



# Exa® PACS|RIS

## 34.1.2

### Physician Portal User's Manual

## Table of Contents

|                                             |   |
|---------------------------------------------|---|
| Welcome to Exa Physician Portal .....       | 3 |
| Introduction .....                          | 3 |
| Getting started with Physician Portal ..... | 5 |

## Welcome to Exa Physician Portal

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

## 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

## Regulatory and compliance



**Konica Minolta Healthcare Americas, Inc.**

2217 U.S. Highway 70 East

Garner, NC 27529 USA

Tel: 1-800-366-5343

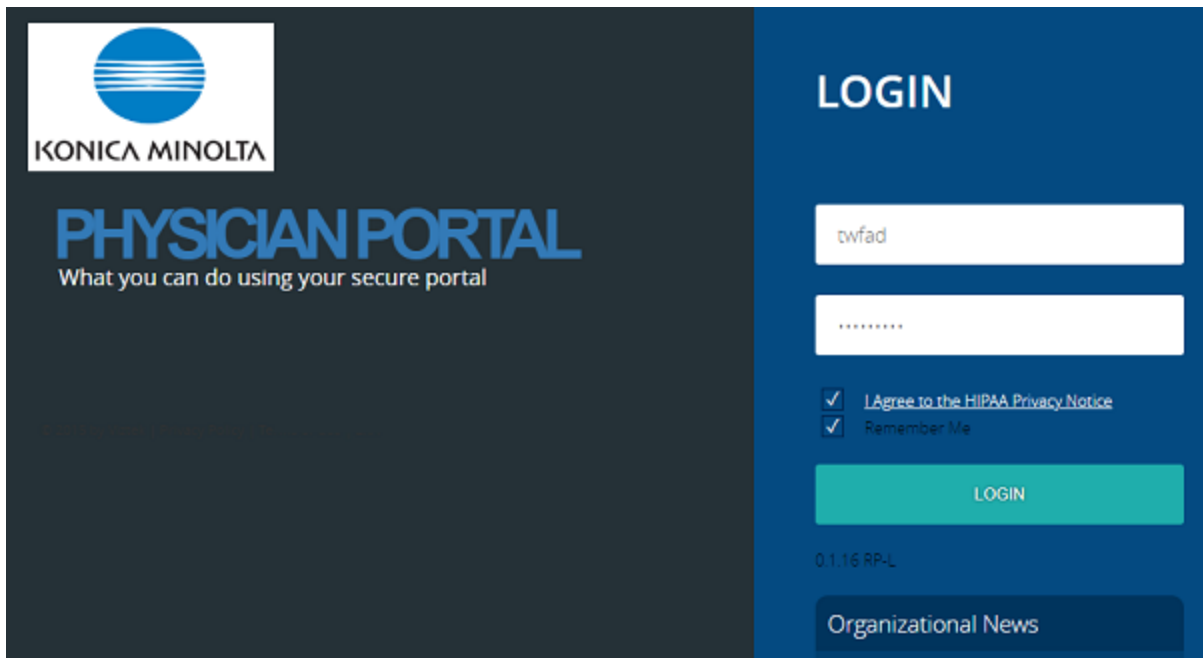
## Getting started with Physician Portal

### Use Physician Portal

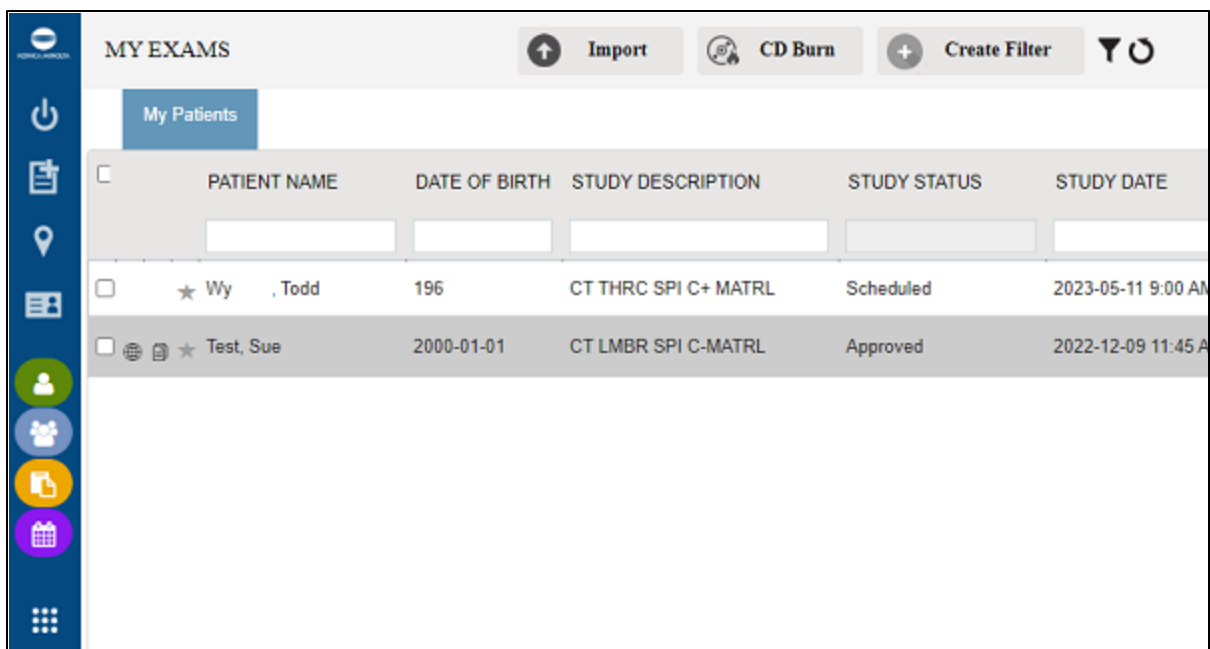
Patient Portal is a web app accessible from Exa PACS/RIS that provides a convenient place to request and view appointments, view your patients' medical records (patient chart), and to send documents requested by your healthcare providers (such as scans of your insurance card).

### Sign in to Physician Portal

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

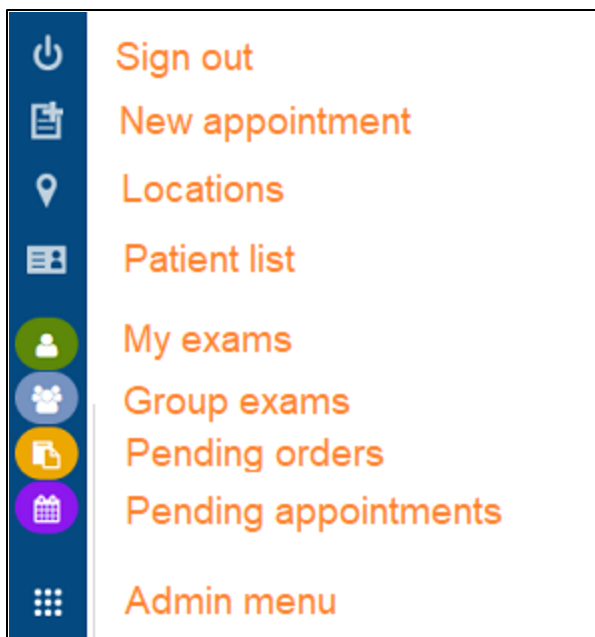


2. On the right pane, type your sign-in credentials, select I Agree to the HIPAA Notice, and then select LOGIN.  
Result: The Portal opens to the My Exams worklist, showing all exams with which you are associated (as the primary or "other" physician).



## Navigation bar

The navigation pane always appears on the left side of the screen, giving you quick access to main features.



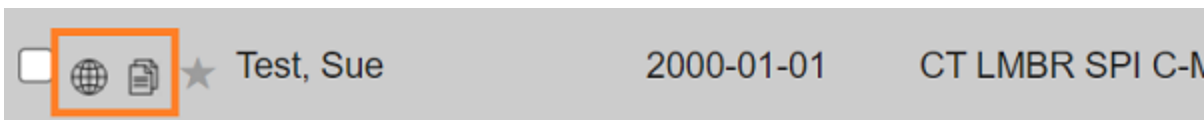
## Open images and approved reports

You can open images and reports for viewing and printing.

1. Select  to open the MY EXAMS worklist.

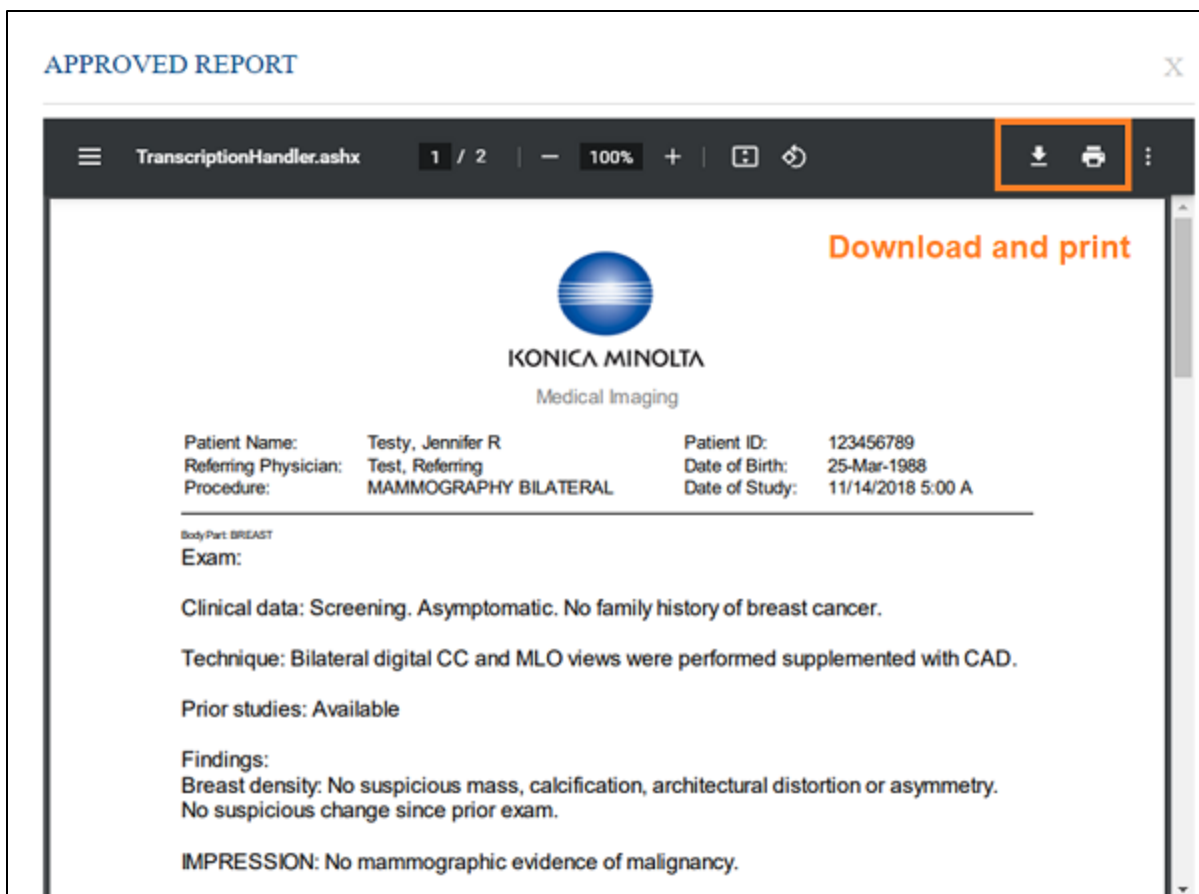
2. Find the study of the images to view.

To filter or sort the worklist, type or select search criteria in column headers.

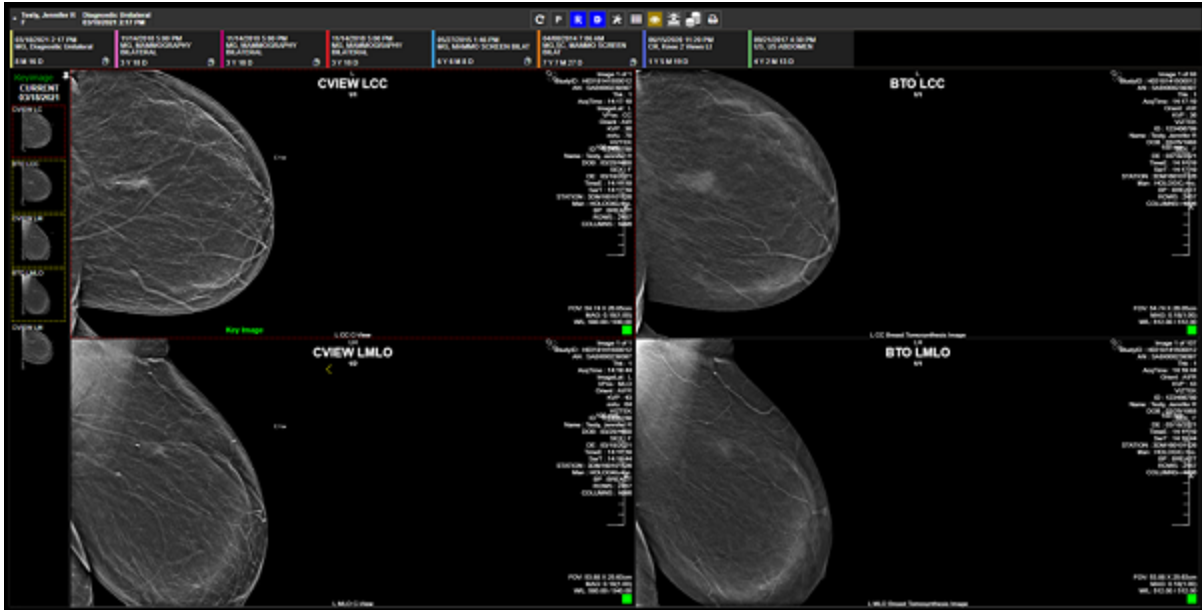


3. To view images, select the viewer  button.
4. To view the approved report, select the report  button.

Example of an approved report:



Example of an image open in the viewer



In the viewer tool bar, the following tools are available.



Refresh - Refresh the viewer

Notes - View study notes

Reports - View prior reports

Documents - View patient documents

Settings - Adjust viewer settings

Tools

Layout - Change the frame layout

Overlays - Show or hide overlays

Cutlines - Show or hide cutlines

Slices - Change slice thickness

Print - Print the images

## View group exams, pending orders, and appointments

You can view a worklist that includes all patients seen by all members of your provider group. You can view worklists of pending orders and appointments.

1. Select  to open the GROUP EXAMS worklist.



| GROUP EXAMS                                                                                                                  |               |                                                                                   |              |                                                                                   |               |                                                                                     |                      |                                                                                                   |  |
|------------------------------------------------------------------------------------------------------------------------------|---------------|-----------------------------------------------------------------------------------|--------------|-----------------------------------------------------------------------------------|---------------|-------------------------------------------------------------------------------------|----------------------|---------------------------------------------------------------------------------------------------|--|
|                                                                                                                              |               |  |              |  |               |  |                      | Select Filter  |  |
| PATIENT NAME                                                                                                                 | DATE OF BIRTH | STUDY DESCRIPTION                                                                 | STUDY STATUS | STUDY DATE                                                                        | ACCESSION NO. | FACILITY                                                                            | MODALITY             | REFERRING PHYSICIAN                                                                               |  |
| <input type="checkbox"/> Gator, Ade                                                                                          | 01/01/1995    | ABDOMEN X-RAY                                                                     | Scheduled    | 11/09/2021 12:00 AM EST                                                           | 376           | Pineapple Under The Sea                                                             | Computed Radiography | Doctor, Trested                                                                                   |  |
| <input type="checkbox"/> Nuckols, Thomas                                                                                     | 08/19/1980    | Requesting Exam                                                                   | Ordered      |                                                                                   | 256           | Konica Minolta Healthcare Americ                                                    | Computed Radiography | Doctor, Nicole                                                                                    |  |
| <input type="checkbox"/>  Test, Marc        | 03/25/1988    | CT ABD & PELVIS W/O CONTRAST                                                      | Approved     | 06/16/2021 4:40 PM EDT                                                            | 254           | Dave's Hospital                                                                     | Computed Tomography  | Test, Referring                                                                                   |  |
| <input type="checkbox"/>  Test, Marc        | 03/25/1988    | CT ABD C+/-C+                                                                     | Approved     | 06/16/2021 4:40 PM EDT                                                            | 204           | Dave's Hospital                                                                     | Computed Tomography  | Test, Referring                                                                                   |  |
| <input type="checkbox"/>  Testy, Jennifer R | 03/25/1988    | MMAMMOGRAPHY BILATERAL                                                            | Unread       | 11/14/2018 5:00 PM EST                                                            | 209           | Konica Minolta Healthcare Americ                                                    | Mammography          | Test, Referring                                                                                   |  |

2. Select  to open the PENDING ORDERS worklist.

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

See also [Sign an order](#).

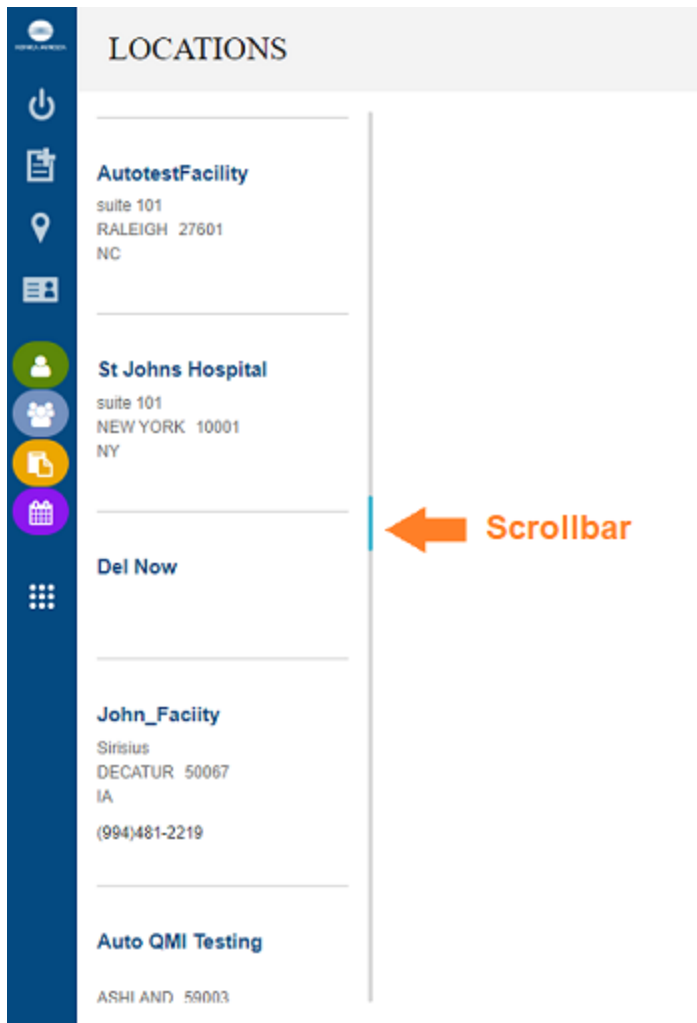
3. Select  to open the PENDING APPOINTMENTS worklist.

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

## View locations

You can open a list of healthcare locations associated with your provider group.

1. Select  to open the locations list.

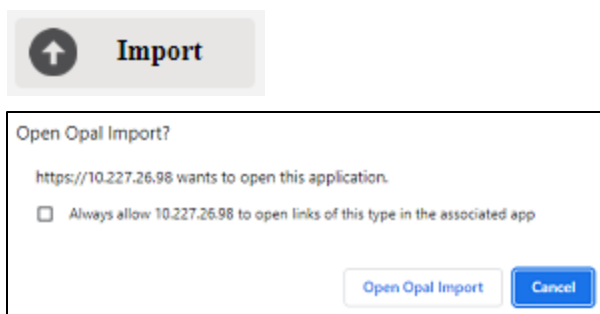


## Import images

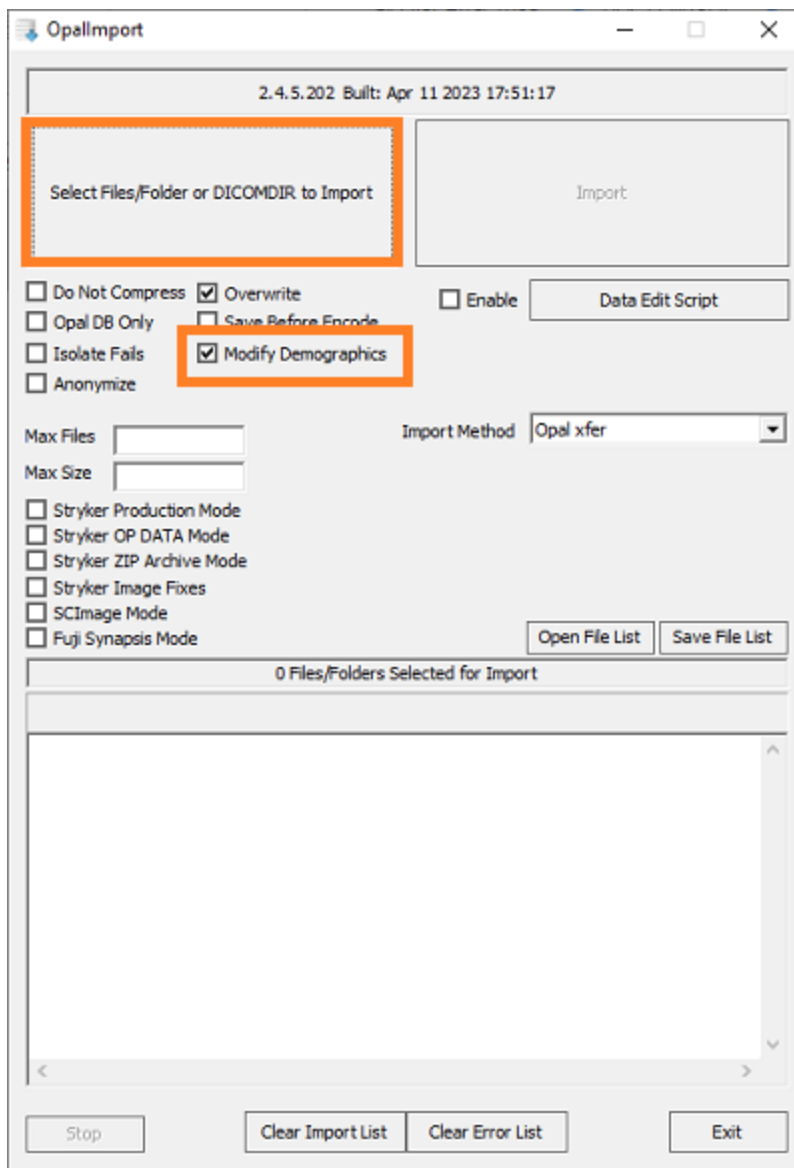
You can import images into studies, such as when a patient brings priors on a CD from another healthcare provider. Imported images appear as new studies on the My Exams worklist of the referring provider. If you or a member of your provider group were not the referring provider, you would have to "break the glass" to view them in Physician Portal.

Prerequisite: From the admin menu, install Opal Import.

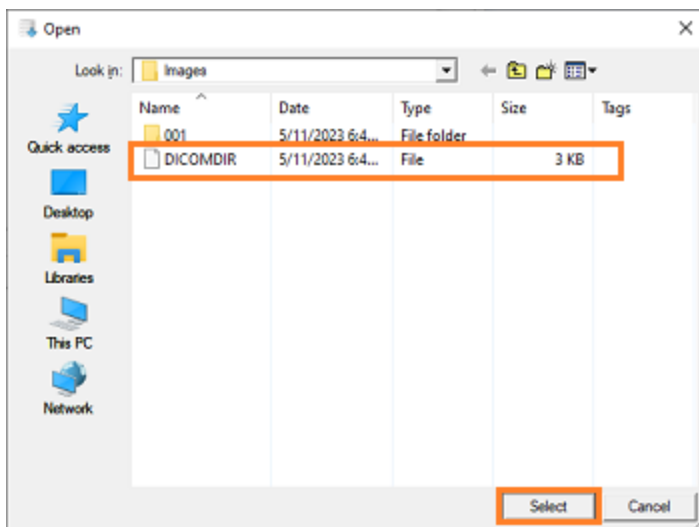
1. On the My Exams worklist, select the import button, and then select Open Opal Import.



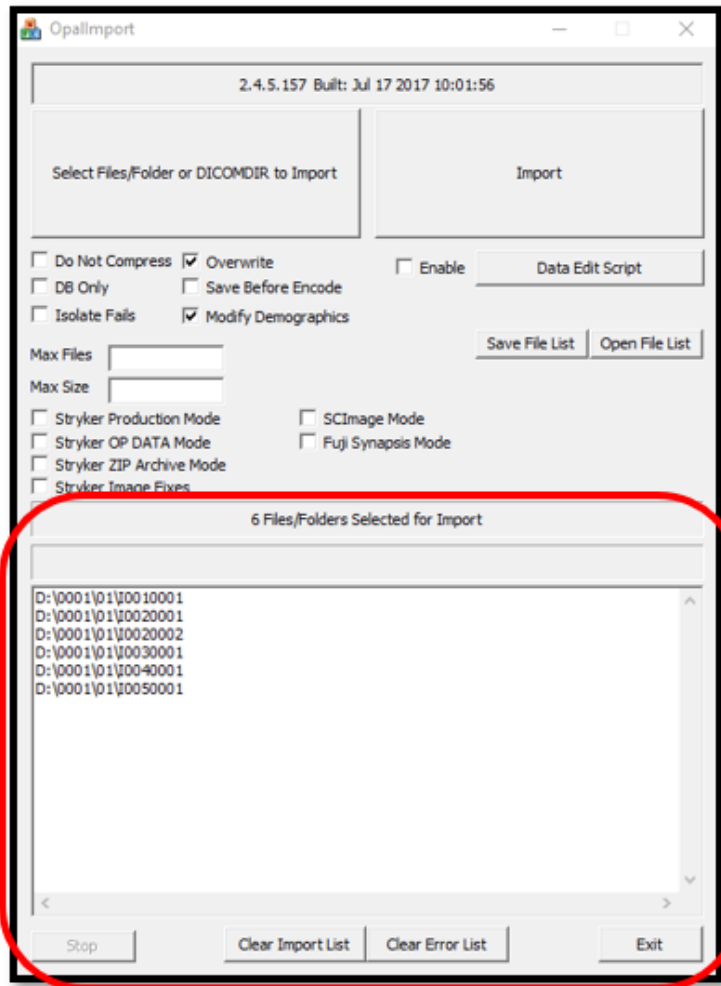
2. In the OpalImport window, select Modify Demographics., and then select Select Files/Folder or DICOMDIR to Import.



3. Browse for and select the DICOMDIR file.



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



5. Select Import.

6. In the Modify/Confirm Demographics screen, enter matching demographics in the proper format for your facility, and then select MODIFY.

Modify/Confirm Demographics

**Current Info**

Id:

Name:

DOB:

Institution:

**New Info**

Id:

Name:

Format: Lastname^Firstname^MI^Prefix^Suffix

DOB:

Format: YYYYMMDD (no slashes or dashes)

Institution:

**DB Query**

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

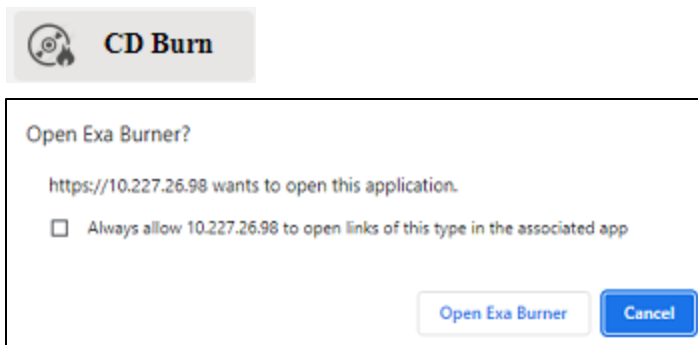
Result: The images are imported.

## Burn studies to media

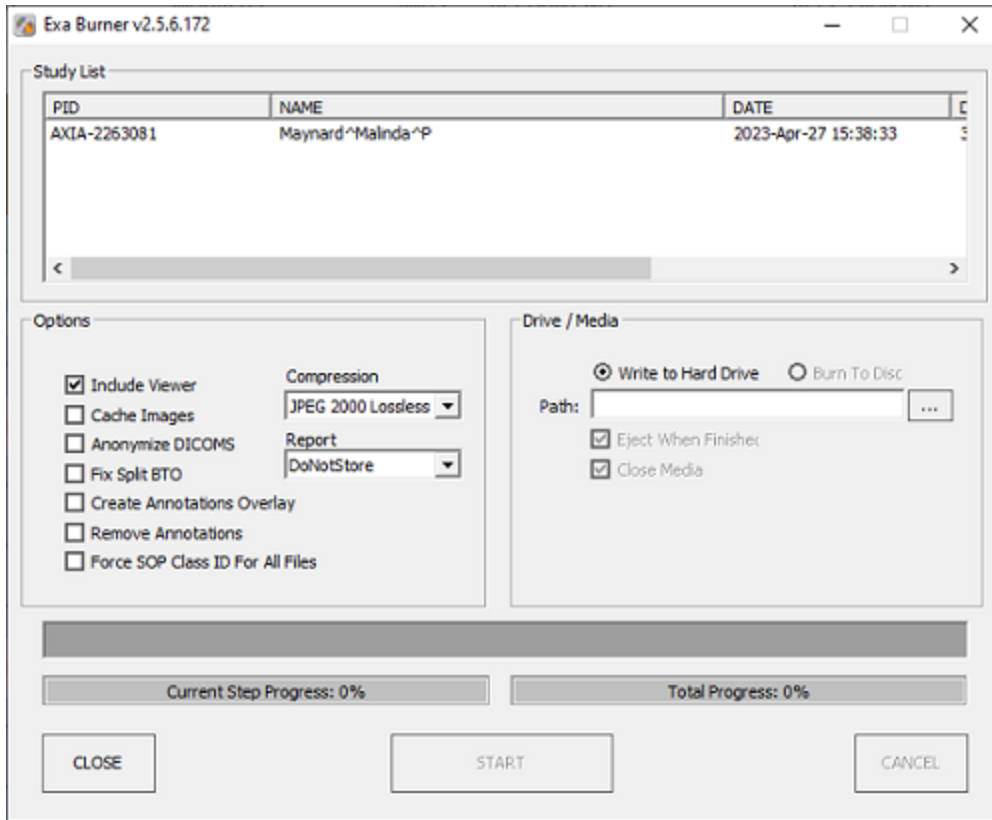
You can burn DICOM studies on the My Exam worklist to a hard disc or removable disc.

Prerequisite: [Install Exa Burner](#).

1. On the My Exams worklist, select the checkboxes of studies that you want to burn to media.
2. Select the CD Burn button, and then select Open Exa Burner.



Result: Exa Burner opens.



3. In Exa Burner, select the following options 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 disc or removable disc.                                        |
| Burn to Disc                     |                                                                                                    |
| Path                             | Select the ellipsis button and then browse for and select a destination drive and/or path.         |

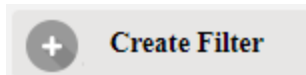
| Setting             | Description                                                                               |
|---------------------|-------------------------------------------------------------------------------------------|
| Eject When Finished | Select to eject the disc after burning.                                                   |
| Close Media         | Select to finalize the media after burning so that it is no longer available for writing. |

4. If using a removable disc, insert the disc in the burner.
5. Select START.

## Create or edit a worklist filter

You can create a filter to customize what information appears on the My Exams worklist.

1. On the My Exams worklist, select the Create Filter button.



2. In the Filter Settings screen, type a filter name, and then select columns and type values by which to filter.

Example: To show only patients whose names begin with "W" :

The screenshot shows the "FILTER SETTINGS" screen. At the top right is a close button "X". Below the title are three buttons: "SAVE", "BACK", and "CLEAR". The "Filter Name" field contains the text "W" patients only. Below this are two columns: "Filter Columns" and "Filter Values". In the "Filter Columns" column, the "Patient Name" checkbox is checked. In the "Filter Values" column, the value "W" is entered in the first row. Other rows in the "Filter Columns" column include "Date of Birth", "Study Description", "Study Date", "Accession No.", "Referring Physician", "Facility", "Modality", and "Study Status", all with unchecked checkboxes. The corresponding "Filter Values" rows are empty or show "All" for the dropdowns.

3. Select SAVE.
4. To use the filter, select it in the Select filter dropdown list.

The screenshot shows the 'My Exams' interface. At the top, there are buttons for 'Import', 'CD Burn', and 'Create Filter'. A dropdown menu is open, showing options: 'Test filter', 'Select Filter', 'Test filter', and '"W" patients only' (which is highlighted). Below the menu is a table with columns: PATIENT NAME, DATE OF BIRT, STUDY DESCRIPTION, STUDY STATUS, STUDY DATE, ACCESSION N, and FACILITY. The first row of data shows a patient named 'W, Todd' with a study description 'CT THRC SPI C+ MATRL', status 'Scheduled', date '2023-05-11 9:00 AM EDT', accession number '30303', and facility 'My Comp'. A star icon is next to the patient name.

- To edit a filter, on the My Exams screen, select the filter settings button, and then select a filter to edit.

This screenshot shows a close-up of the filter settings area. It includes a 'Create Filter' button, a 'Select Filter' dropdown menu, and a filter settings icon (a funnel with a plus sign) which is highlighted with an orange box.

## Open a patient chart

You can open a patient chart to view demographics and other patient related information.

- Select  to open the patient list.

The screenshot shows the 'PATIENT LIST' table. It has columns for PATIENT NAME, DOB, SEX, ACCOUNT NO., and ADDRESS. The first two rows of data are visible:

| PATIENT NAME | DOB        | SEX | ACCOUNT NO. | ADDRESS     |
|--------------|------------|-----|-------------|-------------|
| Test, Sue    | 2000-01-01 | F   | TesS3816    | 111 main st |
| Wy, Todd     | 196        | M   | tw123       |             |

- Double-click a patient to open the patient chart.



**PATIENT DASHBOARD**

| Patient Demographics                                                                                                                                      | Alerts                                 | Results            |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------|--------------------|
| <p>First Name   Middle Name   Last Name   Suffix</p> <p>Todd   -   Wy   -</p> <p>DOD   Sex   Language</p> <p>1981   M  </p> <p>Radiol/Clinic</p> <p>/</p> | No alerts found                        | No results found   |
| Problems                                                                                                                                                  | Medications and Prescriptions          | Allergies          |
| No problems found                                                                                                                                         | No medications and prescriptions found | No allergies found |

## Attach a document to an exam

You can add a scanned document (such as an order form) to an exam. You can also view an existing document by double-clicking it in the patient document window described below.

1. Select  to open the patient list.
2. In the Patient List, in a patient row, select the Upload Patient Document button.

**PATIENT LIST**

| PATIENT NAME                                                                                  | DOB                  |
|-----------------------------------------------------------------------------------------------|----------------------|
| <input type="text"/>                                                                          | <input type="text"/> |
|  Test, Sue | 2000                 |
|  Todd      | 1981                 |

3. In the patient document window, select the Upload Patient Document button.

PATIENT DOCUMENTS FOR TEST, SUE

DOCUMENT TYPE DOCUMENT IMPORT/UPLOAD DOCUMENTS CREATED DATE CREATED BY REQUEST

All All

4. In the MY ACCOUNT window, select a document type.

MY ACCOUNT

Document Type: Patient Forms

File

Notes: Pain sheet

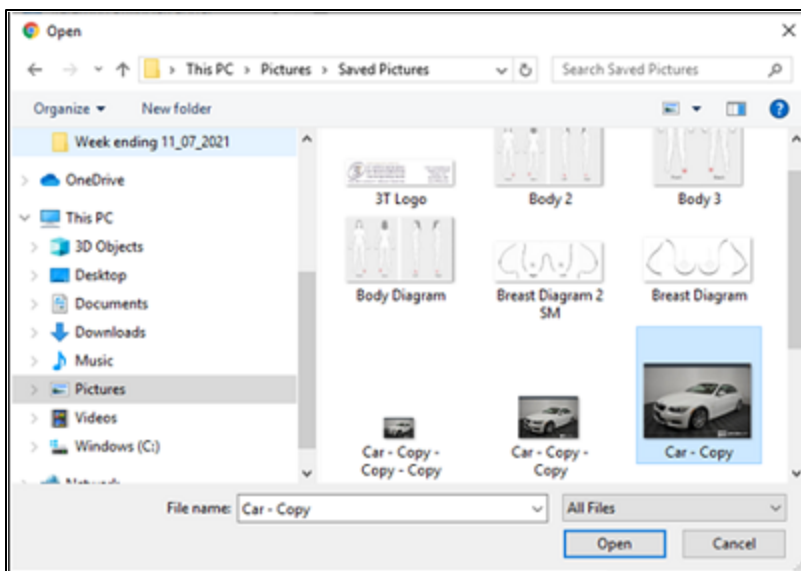
Linked Study

| Accession No. | Description            | Mod Study Date |
|---------------|------------------------|----------------|
| 4679          | CT LMBR SPI C-MATRL CT | 2022-12-09     |

SELECT

UPLOAD CANCEL

5. Optional. Enter notes.
6. Under Linked Study, select to which exam you want to add the document.
7. Select SELECT, and then browse for and select a document to add.



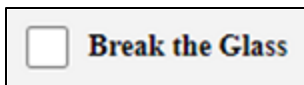
8. Select UPLOAD.

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

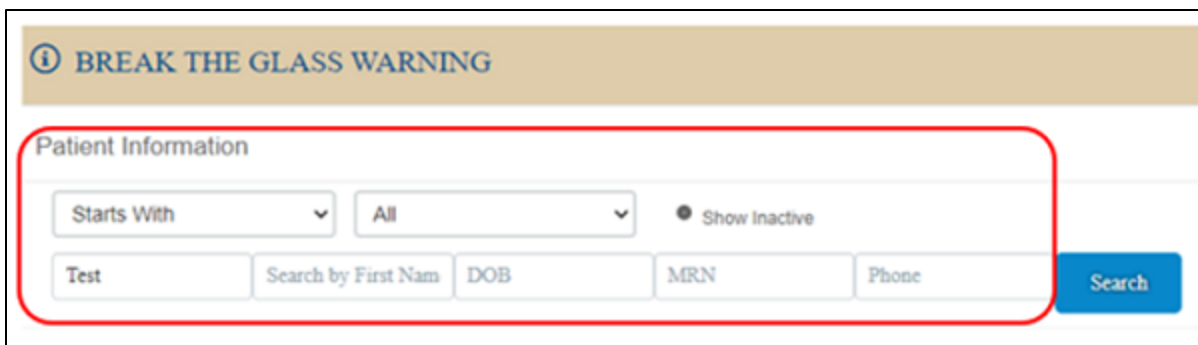
## Break the Glass

If the My Exam worklist contains studies for which you are not the referring or CC provider, and you have been granted the appropriate user rights, you have the option of using the Break the Glass feature to open those studies.

1. On the My Exams worklist, select the Break the Glass checkbox.

A rectangular button with a light gray background. On the left is an unchecked checkbox. To its right, the text "Break the Glass" is displayed in a bold, black, sans-serif font.

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

A screenshot of the "BREAK THE GLASS WARNING" screen. The title bar is gold with a blue information icon and the text "BREAK THE GLASS WARNING". Below the title bar is a white section titled "Patient Information". This section contains a search form with two dropdown menus: "Starts With" (set to "All") and "All" (set to "All"). To the right of these is a radio button labeled "Show Inactive". Below the dropdowns are five input fields: "Test", "Search by First Nam", "DOB", "MRN", and "Phone". A blue "Search" button is located to the right of the "Phone" field. A red rounded rectangle highlights the "Patient Information" section.

Result: Matching patients appear in the list.

① BREAK THE GLASS WARNING

Patient Information

Starts With

All

Show Inactive

test

Search by First Nam

DOB

MRN

Phone

Search

Test, Nuclear M NMTest001

DOB: 10/06/1981

Test, Jenn TesJ1001

DOB: 03/25/1988

Test, Mawc MAWC1

DOB: 03/25/1988

Testy, Jennifer R 123456789

DOB: 03/25/1988

Test, Jenn TESJ175

DOB: 03/25/1988

Test, Mg NCCCHIC17566

DOB: 11/08/1960

Test, Eric tese1005

DOB: 01/01/1980

Test, Barry 1234321

DOB: 10/10/2010

Test, Nicole TesN1007

DOB: 01/01/2000

★ Test, Twana 654e

DOB: 12/12/2001

- Double-click the patient whose studies you want to open.

① BREAK THE GLASS WARNING

X

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

Access Reason

Direct Patient Care

Verify your credential

def

\*\*\*\*\*

ACCEPT

CANCEL

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

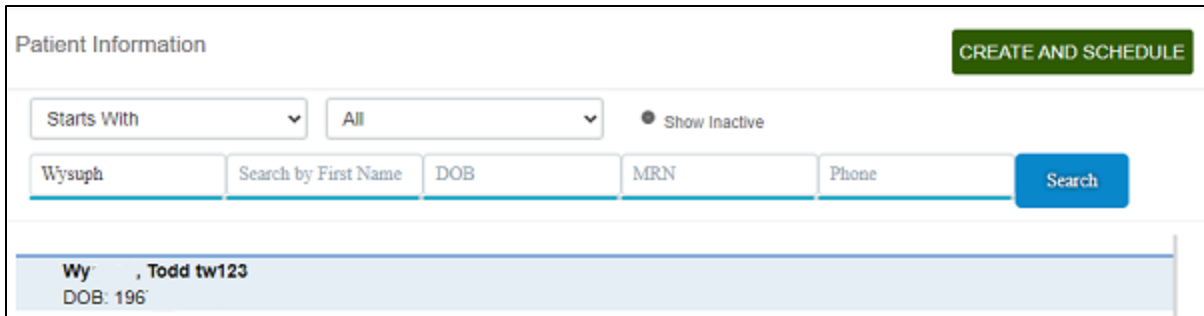
Result: A temporary worklist appears containing the studies of the patient you selected. If you log out of and back into Physician Portal, this worklist is not available unless you repeat the above procedure.

## Create and schedule an exam

You can create an order for an exam. Staff at your facility receive the order and can schedule an appointment.

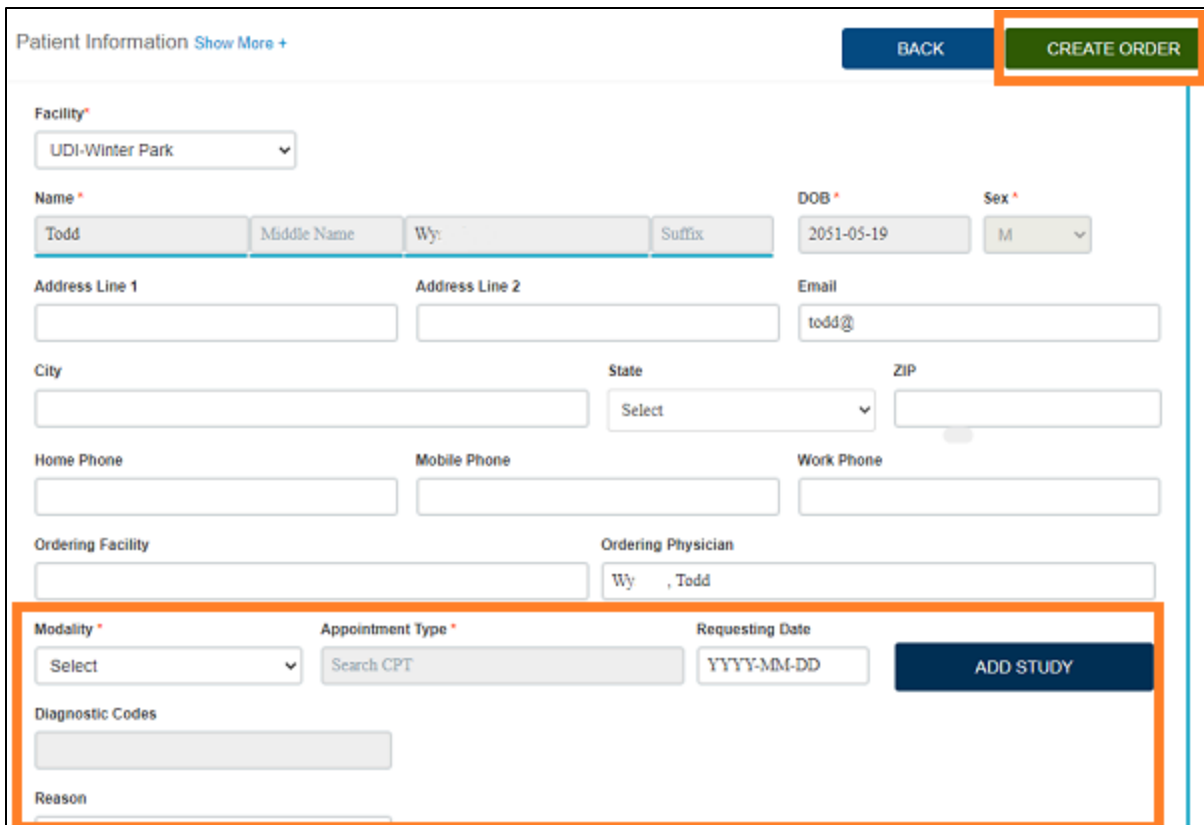
1. Select  and then do one of the following.
  - To create a new patient, select CREATE AND SCHEDULE, and then skip to step 3.
  - To schedule an existing patient, find the patient by entering criteria and selecting Search.

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



Result: Patients matching your criteria appear in a list.

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



3. Enter required information for the exam to order and then select ADD STUDY.
4. Optional. Repeat to add more exams to the order.

- At the top of the screen, select CREATE ORDER.

Result: The order is created and an order summary appears.

The screenshot shows the 'ORDER SUMMARY' window with a close button (X) in the top right corner. The window is divided into three main sections: Patient Details, Physician Details, and Map Location. The Patient Details section lists information for 'Tester, Braxton O', including DOB, gender, address, city/state/zip, home, mobile, and work phone numbers, and email. The Physician Details section lists information for 'Doctor, David', including address, city/state/zip, phone, and fax numbers. The Map Location section is currently blank. Below these sections is the 'Appointment Details' section, which displays a green message: 'Your order has been created successfully'. It also shows the location as 'Eric's Best Practice', the type as 'Pre Order', and the status as 'Ordered'. At the bottom right, there are three buttons: 'PRINT', 'UPLOAD', and 'CLOSE'.

- Optional. To attach a document, select UPLOAD.
- Select CLOSE.

## View the audit log

You can view an audit log of activity on Physician Portal.

- On the admin menu, select the activity log button.



Result: The audit log opens with a list of entries.

| AUDIT LOGS                                   |            |              |                              |
|----------------------------------------------|------------|--------------|------------------------------|
| LOGGED DATE                                  | SCREEN     | PATIENT NAME | LOG DESCRIPTION              |
| 2023-05-09 - 2023-05-11                      |            |              |                              |
| <a href="#">View</a> 2023-05-11 12:57 PM EDT | EXA Logout |              | User logout: Wy ,Todd (      |
| <a href="#">View</a> 2023-05-11 12:10 PM EDT | EXA Logout |              | User logout: Wy. Todd (      |
| <a href="#">View</a> 2023-05-11 11:33 AM EDT | Phy.Login  |              | Add: New worklist filter("W" |

- Double-click an entry to view details.

| MY ACCOUNT   |                                              |
|--------------|----------------------------------------------|
| User:        | twRP                                         |
| Client IP :  | 10.227.8.20                                  |
| Patient :    | -                                            |
| Module :     | Worklist                                     |
| Screen:      | EXA Logout                                   |
| Logged Date: | 2023-05-11 12:57 PM EDT                      |
| Description: | User logout: Wy ,Todd (802) logged out at WP |

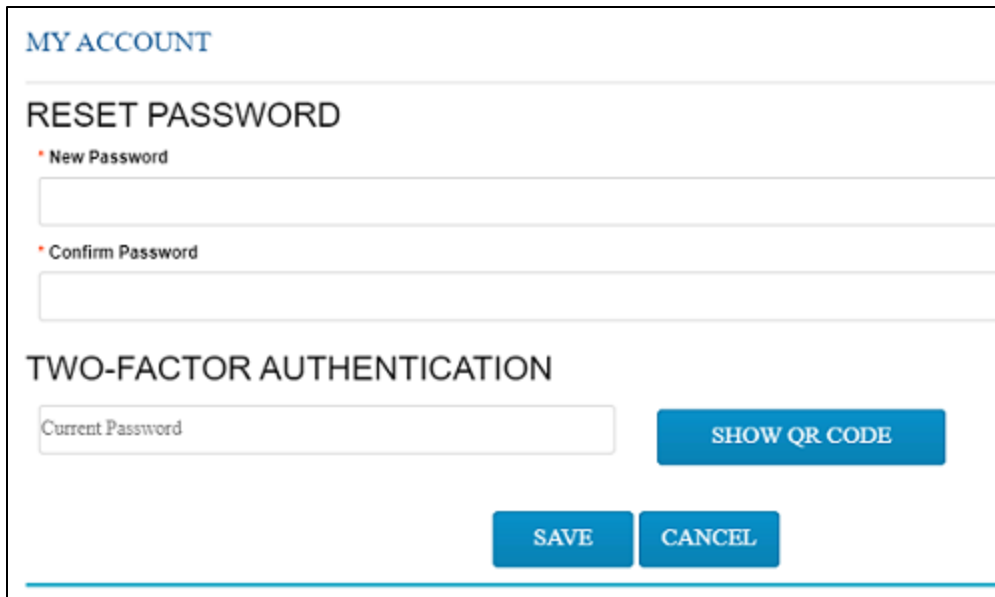
## Configure passwords and two-factor authentication

You can reset your password at any time. If your site purchased a license, you can also configure two-factor authentication (2FA) as described below.

- On the admin menu, select the security button.



- In the My Account dialog, enter a new password, retype to confirm, and then select SAVE.



The screenshot shows a web interface for account management. At the top, it says "MY ACCOUNT". Below that is a section titled "RESET PASSWORD" with two input fields: "New Password" and "Confirm Password". Below this is a section titled "TWO-FACTOR AUTHENTICATION" with a "Current Password" input field and a "SHOW QR CODE" button. At the bottom of this section are "SAVE" and "CANCEL" buttons.

3. Under TWO-FACTOR AUTHENTICATION, type your password, and then select SHOW QR CODE.



The screenshot shows a QR code for two-factor authentication. Below the QR code is a text box containing the alphanumeric string "ZRHCPQQT02BRFP775Q2LR23IQNEETZ4WXCQYY7K". Below this is a "One-Time Passcode" input field and a "Verify" button.

4. Use Google Authenticator to read the QR code and generate the one-time passcode, and then enter it into the box and select Verify.

## Configure your user account

You can edit your account (user profile) directly in Physician Portal. The changes are updated in the Exa PACS/RIS database.

1. On the admin menu, select the profile button.





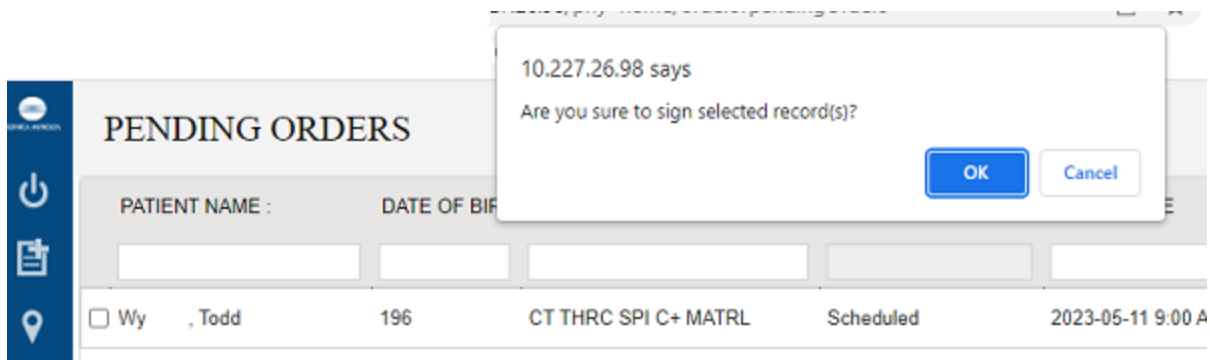
Result: The MY ACCOUNT screen appears with available settings.

2. Edit settings and select SAVE.

## Sign an order

If staff configured a graphical signature file for you, you can add it to orders here. Unsigned orders appear in the Unsigned Orders report if generated in Exa PACS/RIS. Signing an order removes it from that report, and updates the Physician Order Status field in Exa PACS/RIS (found in the Exam Information area of the Edit Study screen). Your signature appears on printed orders in Exa PACS/RIS.

1. Select  to go to the Pending Orders worklist.
2. In the worklist, double-click the exam you want to sign and then select the sign-off  button.



3. In the Are you sure to sign selected record(s)? message window, select OK.

Result: The order is signed, and removed from the Pending orders worklist.

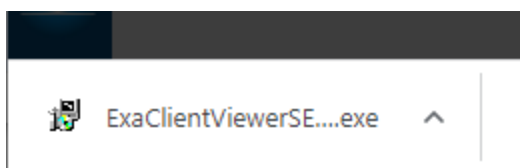
## Install Exa Burner

Before you can use the CD Burn function to burn studies to media, you must install the Exa Burner app by following these steps.

1. On the admin menu, select the Exa Burner button.



Result: Chrome downloads the ExaClientViewerSETUP.exe file.



2. Select the file to run, and follow the on-screen prompts.