



Exa® PACS|RIS

34.1.3

Physician Portal User's Manual

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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



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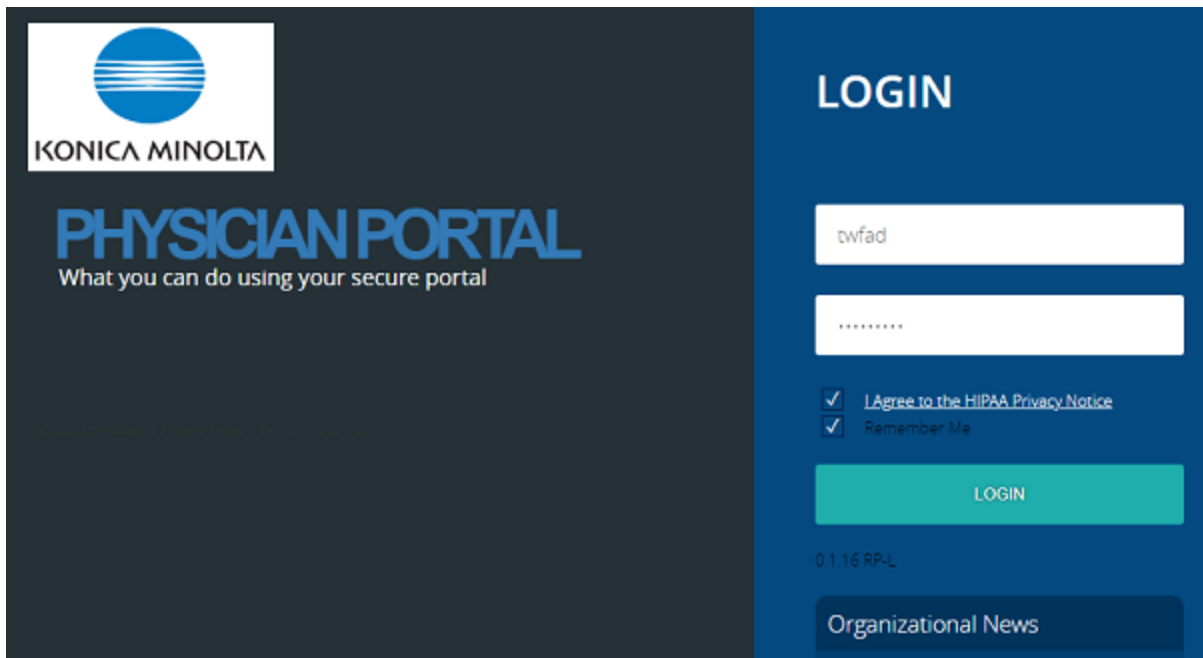
Getting started with Physician Portal

Use Physician Portal

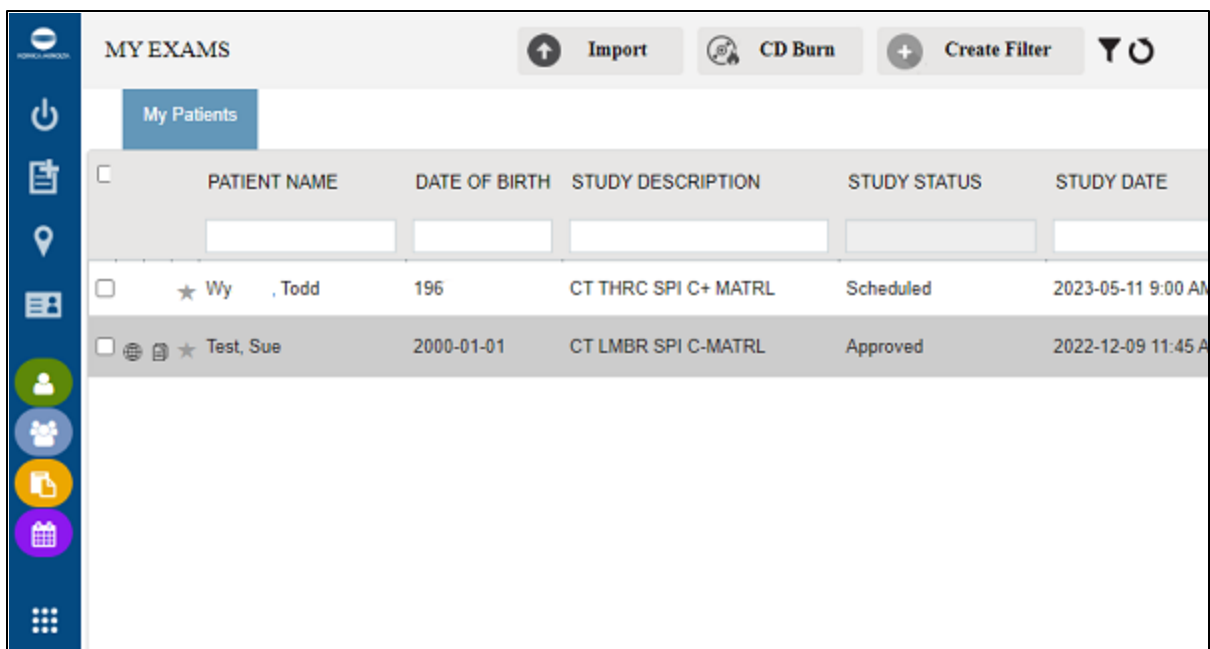
Patient Portal is a web app accessible from Exa PACS/RIS that provides a convenient place to request and view appointments, view your patients' medical records (patient chart), and to send documents requested by your healthcare providers (such as scans of your insurance card).

Sign in to Physician Portal

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

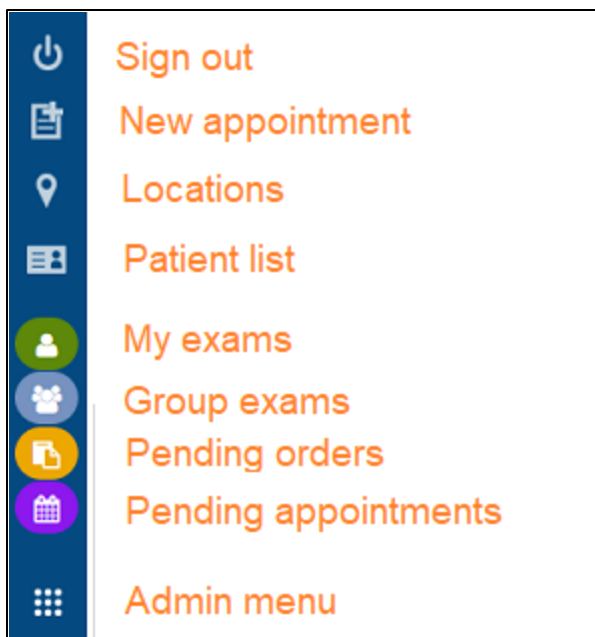


2. On the right pane, type your sign-in credentials, select I Agree to the HIPAA Notice, and then select LOGIN.
Result: The Portal opens to the My Exams worklist, showing all exams with which you are associated (as the primary or "other" physician).



Navigation bar

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



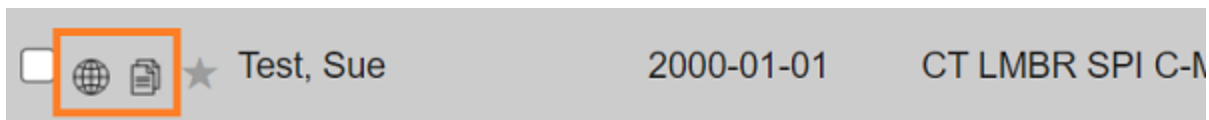
Open images and approved reports

You can open images and reports for viewing and printing.

1. Select  to open the MY EXAMS worklist.

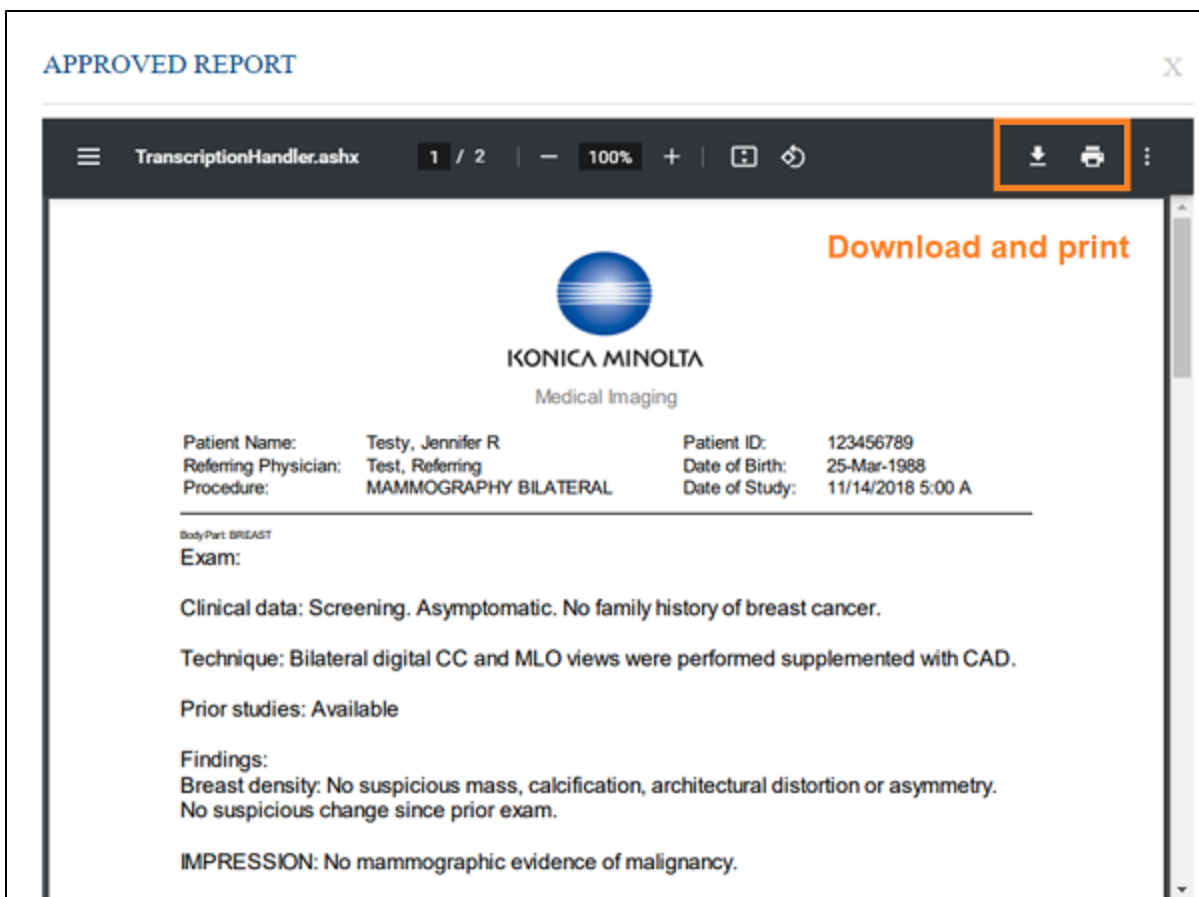
2. Find the study of the images to view.

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

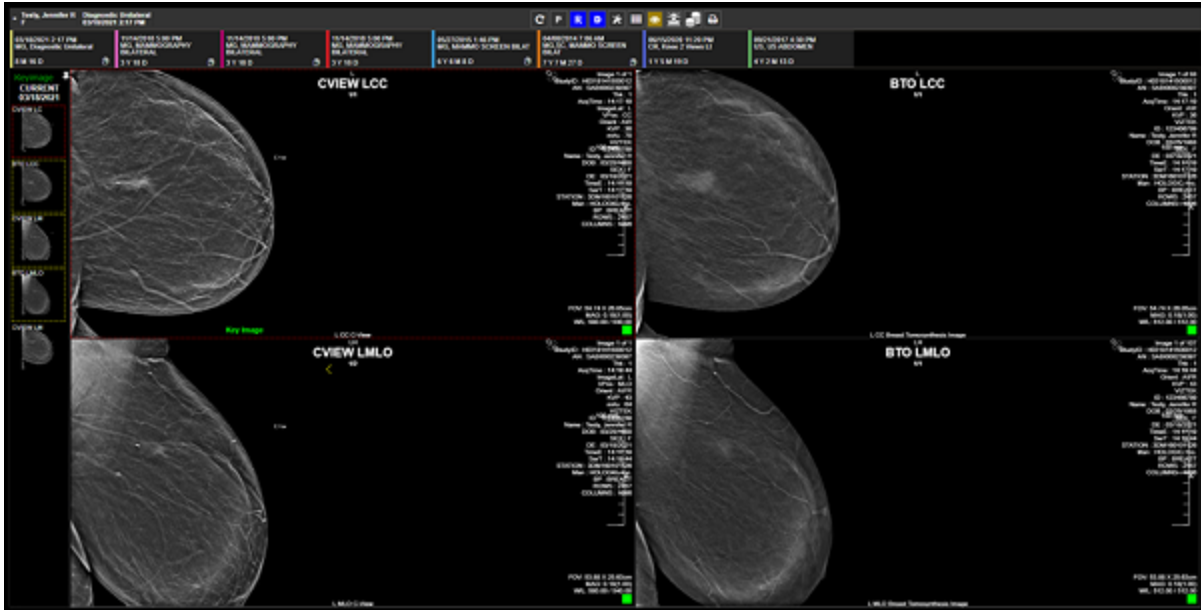


3. To view images, select the viewer  button.
4. To view the approved report, select the report  button.

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	
☐ Gator, Ade	01/01/1995	ABDOMEN X-RAY	Scheduled	11/09/2021 12:00 AM EST	376	Pineapple Under The Sea	Computed Radiography	Doctor, Tessa	
☐ Nuckolls, Thomas	08/19/1980	Requesting Exam	Ordered		256	Kanica Minolta Healthcare Americ	Computed Radiography	Doctor, Nicole	
☐  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	
☐  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	
☐  Testy, Jennifer R	03/25/1988	MMAMMOGRAPHY BILATERAL	Unread	11/14/2018 5:00 PM EST	209	Kanica 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
☐ 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	Requesting Exam	Ordered		391	Eric's Best Practice	MR	Doctor, David		Frequent headaches	

See also [Sign an order](#).

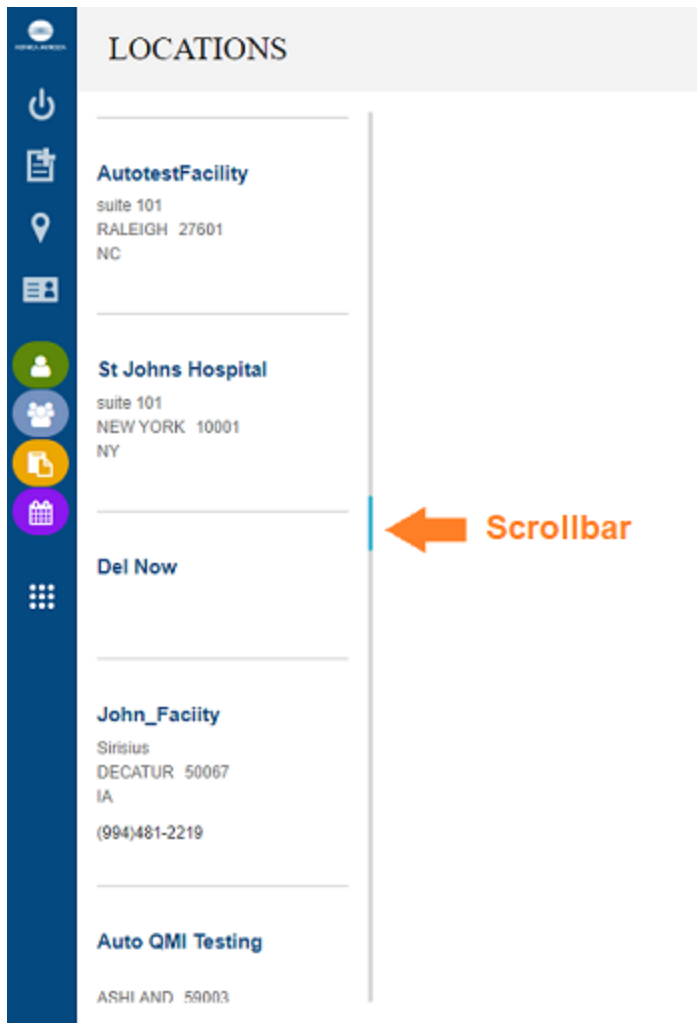
3. Select  to open the PENDING APPOINTMENTS worklist.

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.

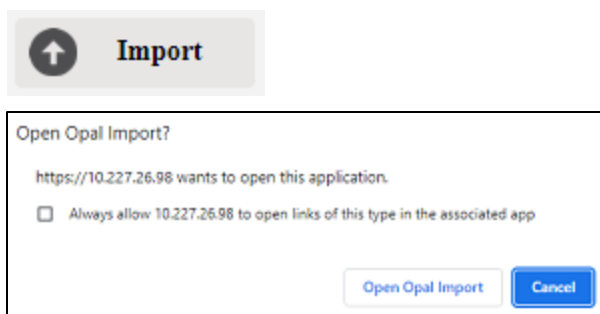


Import images

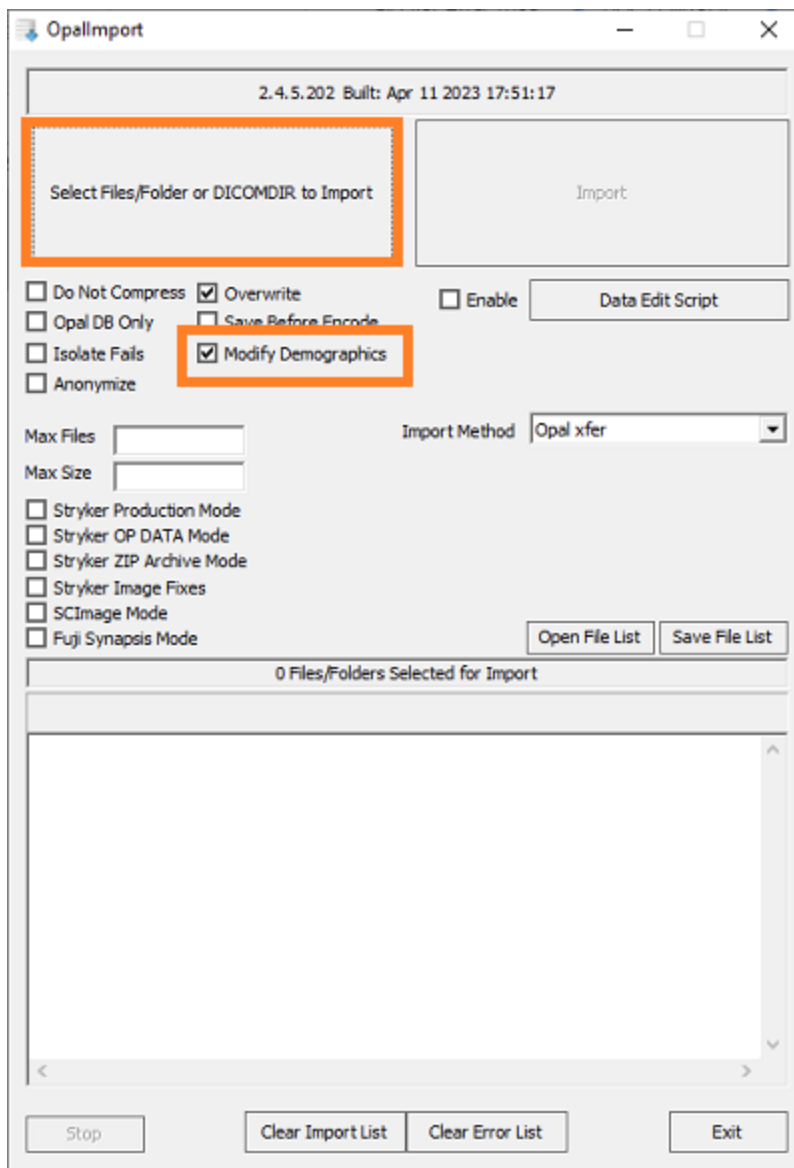
You can import images into studies, such as when a patient brings priors on a CD from another healthcare provider. Imported images appear as new studies on the My Exams worklist of the referring provider. If you or a member of your provider group were not the referring provider, you would have to "break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

Prerequisite: From the admin menu, install Opal Import.

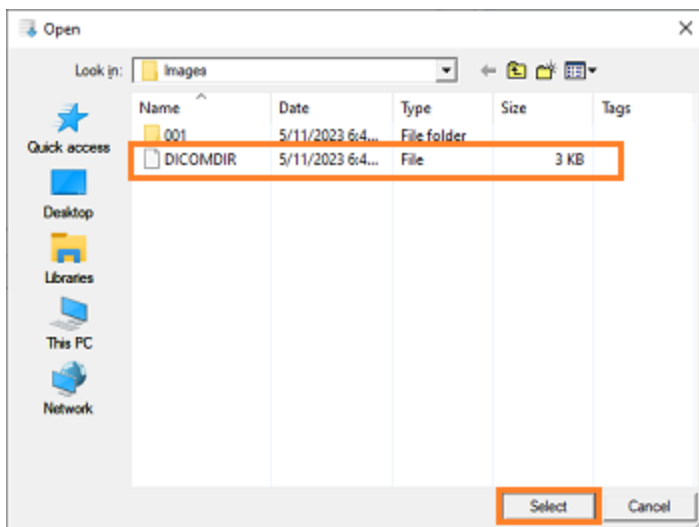
1. On the My Exams worklist, select the import button, and then select Open Opal Import.



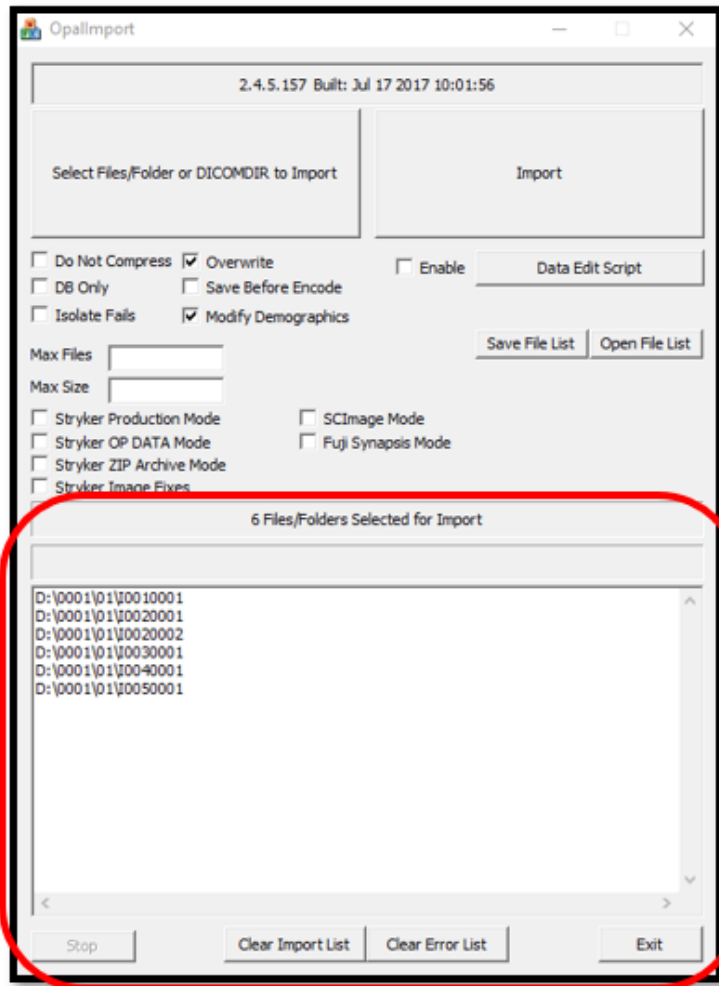
2. In the OpalImport window, select Modify Demographics., and then select Select Files/Folder or DICOMDIR to Import.



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
-----	------	-----

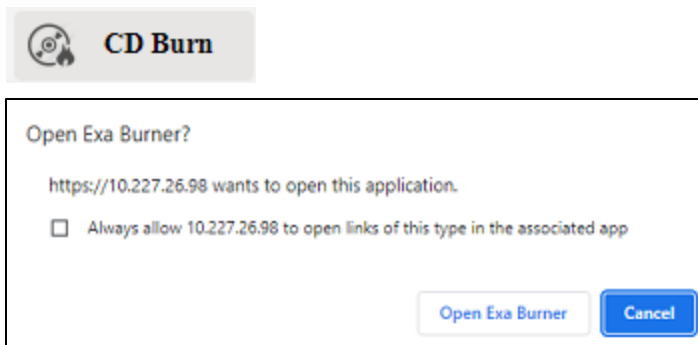
Result: The images are imported.

Burn studies to media

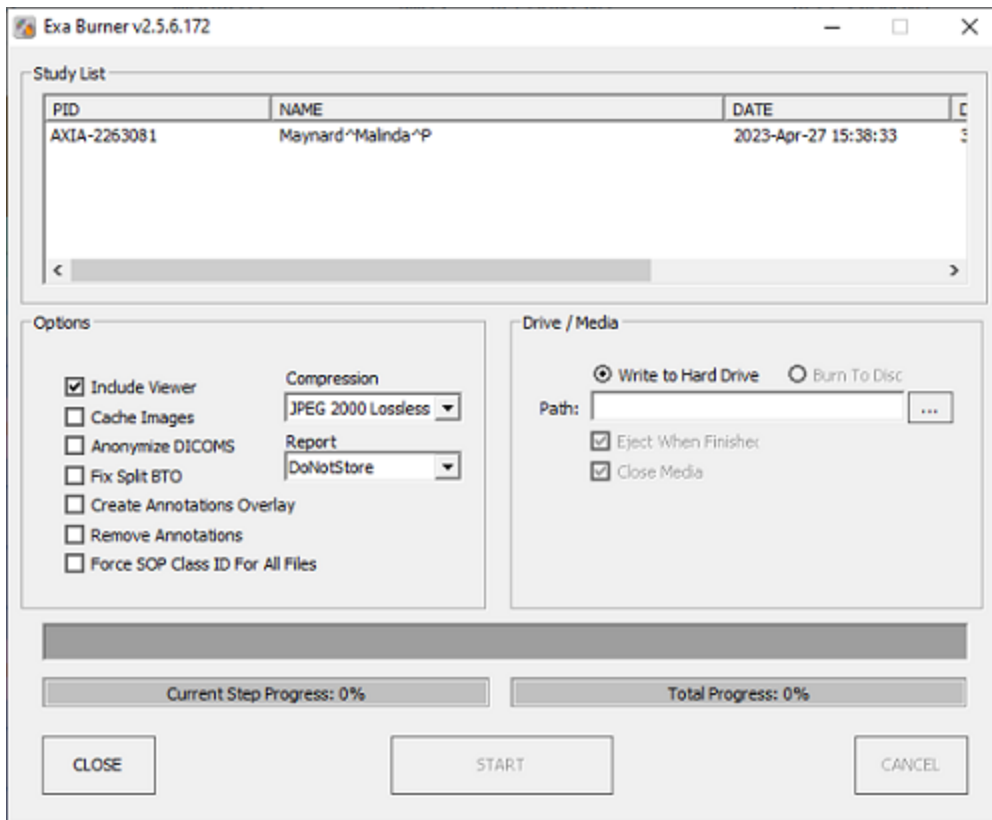
You can burn DICOM studies on the My Exam worklist to a hard disc or removable disc.

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.

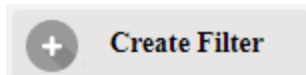
Setting	Description
Eject When Finished	Select to eject the disc after burning.
Close Media	Select to finalize the media after burning so that it is no longer available for writing.

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" row is selected with a checked checkbox. In the "Filter Values" column, the value "W" is entered in the text field corresponding to the selected "Patient Name" 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 "Filter Values" column has corresponding empty text fields for these rows, and two dropdown menus at the bottom labeled "All" and "Please select".

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
First Name Middle Name Last Name Suffix Todd - Wy - DOD Sex Language 19M M Radiol/Clinic /	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
 Test, Sue	2000
 Todd	196

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 File

Patient Forms

Notes

Pain sheet

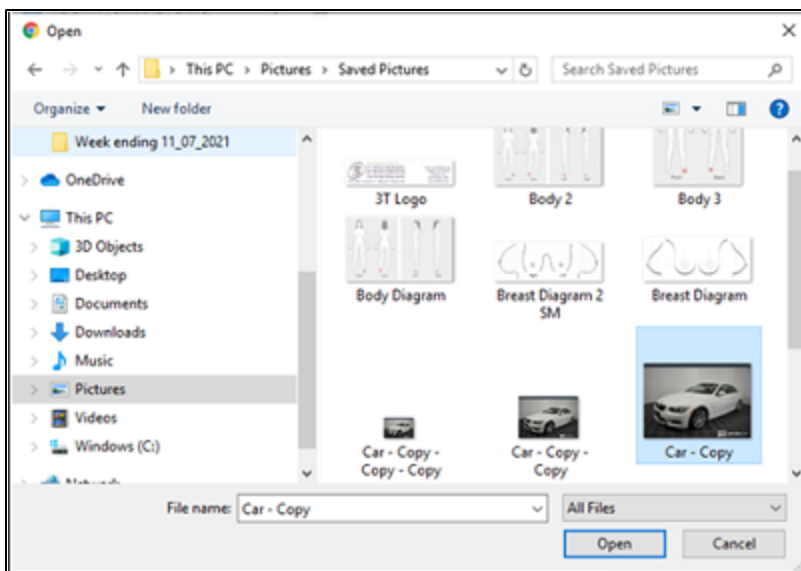
Linked Study

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.



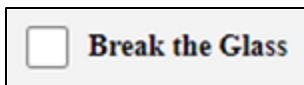
8. Select UPLOAD.

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

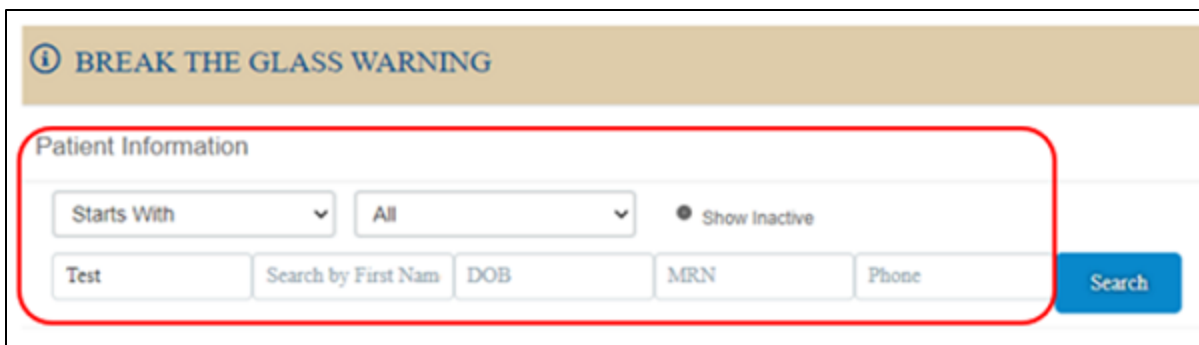
Break the Glass

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 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 section titled "Patient Information" enclosed in a red rounded rectangle. This section contains 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.

Result: Matching patients appear in the list.

① BREAK THE GLASS WARNING

Patient Information

Starts With All ☒ Show Inactive

test Search by First Name DOB MRN Phone

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

3. 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

Verify your credential

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

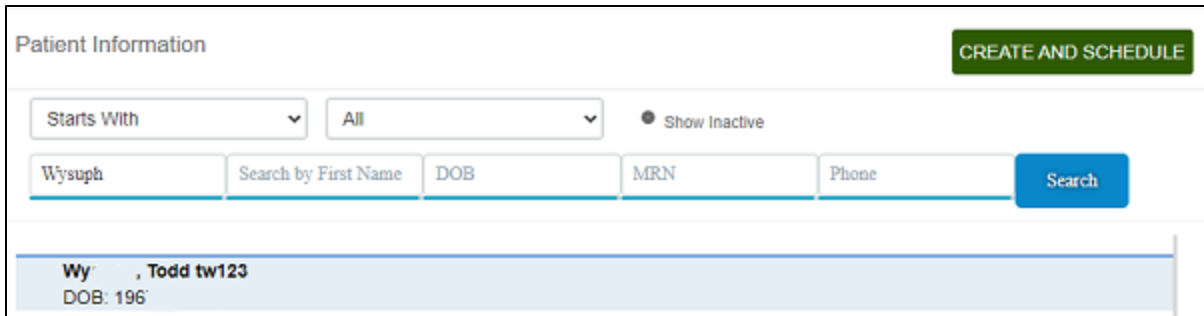
Result: A temporary worklist appears containing the studies of the patient you selected. If you log out of and back into Physician Portal, this worklist is not available unless you repeat the above procedure.

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.

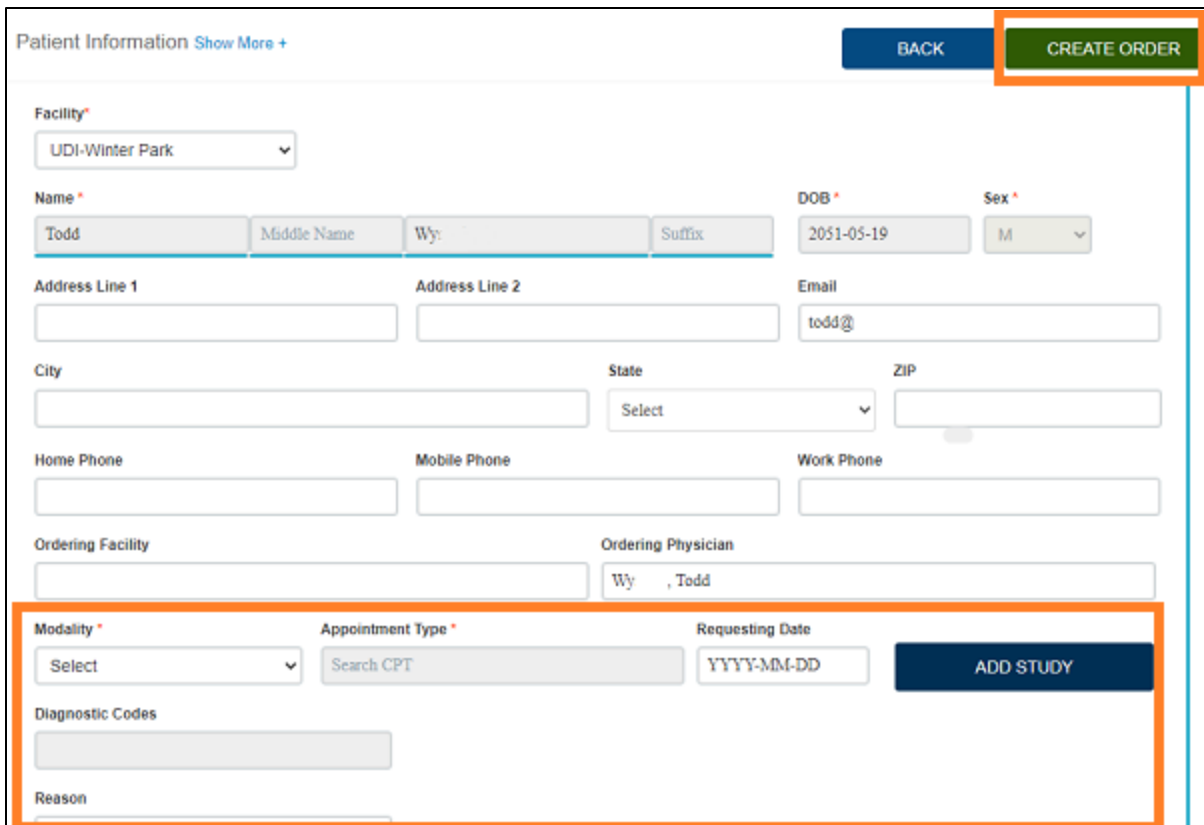
1. Select  and then do one of the following.
 - To create a new patient, select CREATE AND SCHEDULE, and then skip to step 3.
 - To schedule an existing patient, find the patient by entering criteria and selecting Search.

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			
View 2023-05-11 12:57 PM EDT	EXA Logout		User logout: Wy ,Todd (
View 2023-05-11 12:10 PM EDT	EXA Logout		User logout: Wy. Todd (
View 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

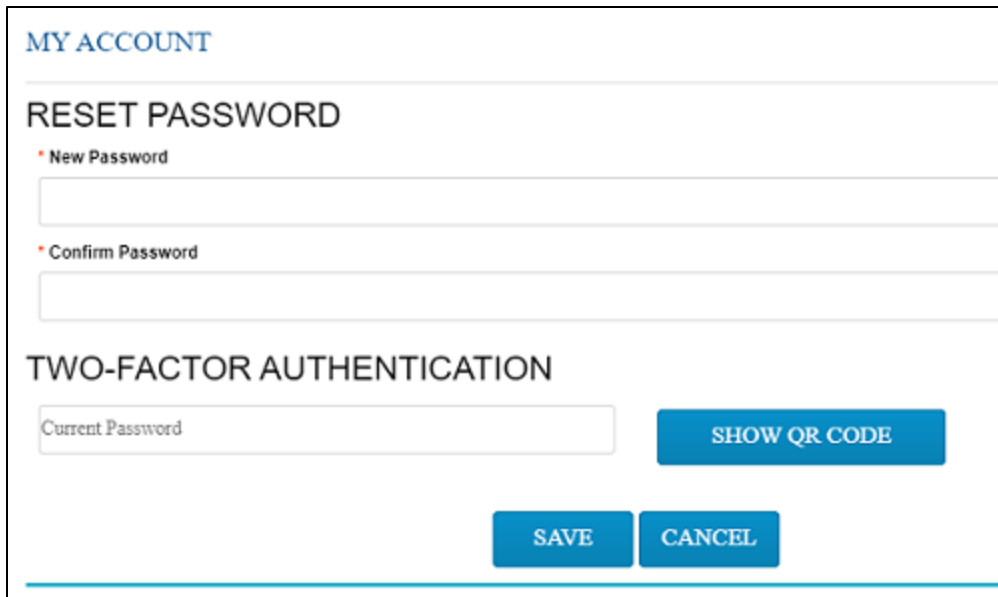
Configure passwords and two-factor authentication

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.

MY ACCOUNT

X

Edit User Settings

Email:

Name

Todd

MI

Wy

Suffix

Title

Dr. Office Name

Phone No.

NPI No.

Federal Tax ID

Taxonomy Code

EIN No.

SSN

Medicare UPIN

License No.

Medicaid Provider No.

Medicare Provider No.

SAVE

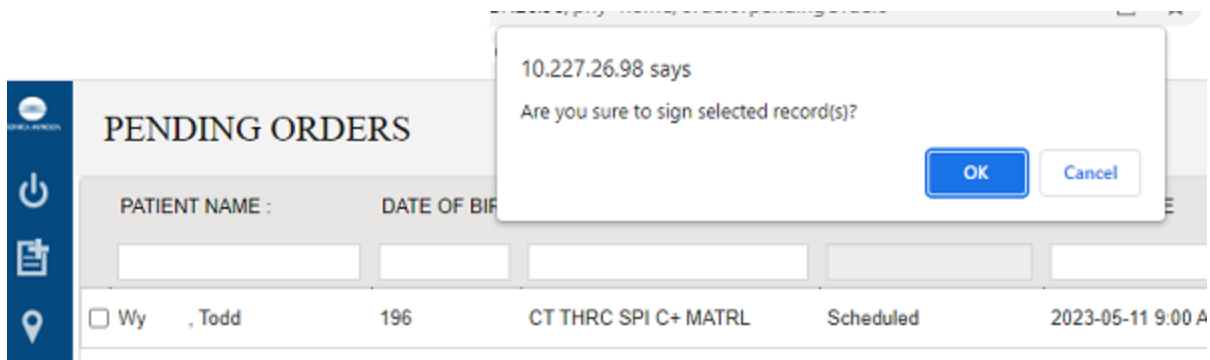
CANCEL

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.

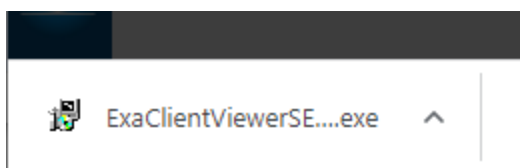
Install Exa Burner

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.