

Exa® PACS|RIS

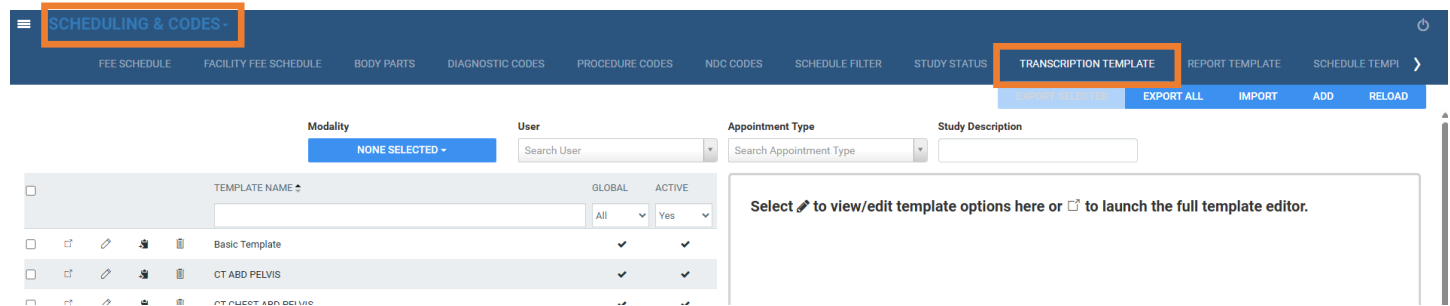
Feature Summary

Version 35.0.1 or Later

Transcription Templates

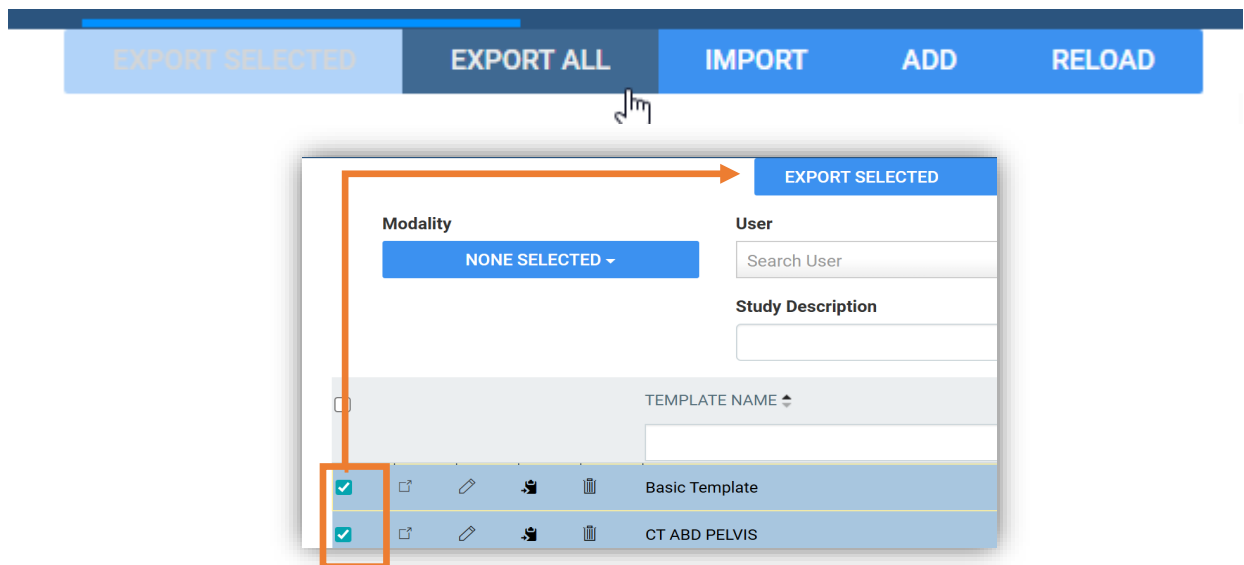
Transcription template screen

Select burger  > **SETUP** > **OFFICE** > **Scheduling & Codes** > **TRANSCRIPTION**.



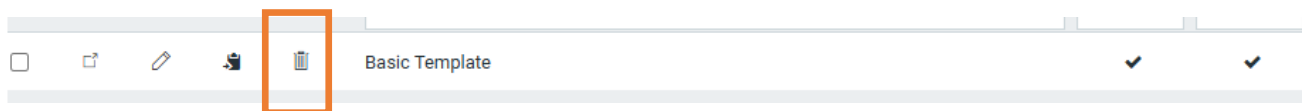
Export templates (Exa to Exa)

You can export all templates or only ones you select from the list.

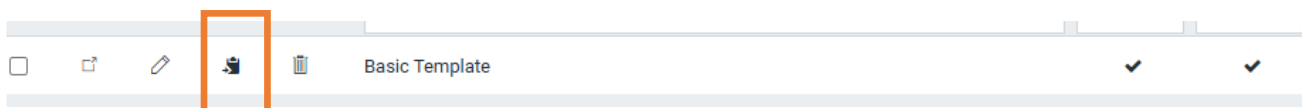


Copy or delete templates

To **delete** a template, select its **trashcan** button in the template list.



To **copy** a template and use it as the starting point for a new one, select the **clipboard** button.



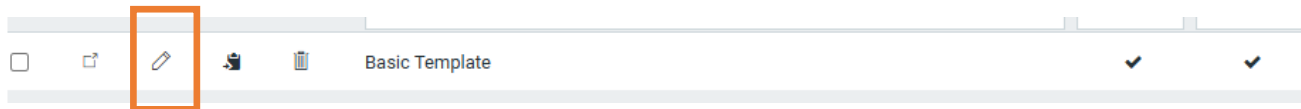
Edit a template

- Click the **Copy** (square) button to open the template in the template editor.
- In the template editor, you can view and edit the template settings and scope, and use the text editor.



Quick view/edit template options of a template

- To quickly review a template's settings and scope, click the **Edit** (pencil) button.
- This opens on the right pane. This is a lighter view because the system does not load the template text editor.
- Values are read-only by default. Select **EDIT** to make changes, then save your updates.

A settings panel for a template. At the top right are two blue buttons: 'COPY' and 'EDIT'. The panel is divided into several sections:

- Template Name ***: A text input field containing 'Basic Template'.
- Inactive**: A checkbox.
- Global**: A checked checkbox.
- Modalities ***: A blue button labeled 'ALL SELECTED (17) -'.
- User**: A search input field with a dropdown arrow and a blue '+' button.
- Require All Match**: A checkbox.
- Markets**: A blue button labeled 'NONE SELECTED -'.
- Facilities**: A blue button labeled '4 SELECTED -'.
- Institution**: A text input field with a blue '+' button.
- Appointment Types**: A search input field with a dropdown arrow and a blue '+' button.
- Body Part**: A blue button labeled 'NONE SELECTED -'.
- Study Description**: A search input field with a dropdown arrow and a blue '+' button.

Create a template

1. Click **ADD**
2. Enter a **Template Name (1)**, and then select one or more **Modalities (8)** to define the template's applicability. Further restrict the availability of your template by entering one or more criteria in any of the categories described below.

Template Name * **1**

☐ Inactive ☐ Global **2**

Macro Keyword **3**

User **4**

Search Appointment Types **5**

☐ Require All Match **6**

Facilities **7**

Modality * **8**

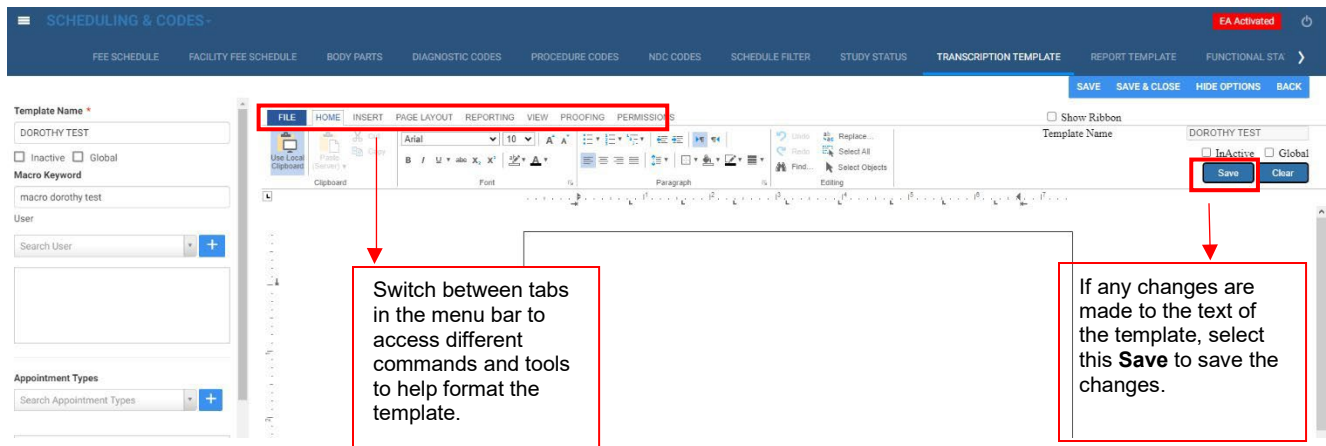
Body Part **9**

Study Description **10**

Institution **11**

1. **Template Name** – Type a name for the template.
2. **Inactive** – Select to inactivate the template.
Global – Select to make template available for all users.
3. **Macro Keyword** – Type a macro keyword that is voice-recognized to open the template Exa Trans.
TIP: Add a starter word before the keyword for better recognition. (Example: “macro chest”)
4. **User** – Restricts availability of the template to the users you select.
5. **Appointment Types** – Restricts availability of the template to studies with the appointment types (CPT codes) you select.
6. **Require All Match** – Restricts availability of the template to users and studies that match all the criteria.
7. **Facilities** – Restricts availability of the template to facilities you select.
8. **Modalities** – Restricts availability of the template to studies with the modalities you select.
9. **Body Part** – Restricts availability of the template to studies of the body parts you select.
10. **Study Description** – Restricts availability of the template to studies having the descriptions you select.
11. **Institution** – Restricts availability of the template to institutions you select.

3. Select **SAVE** to open the template editor.



4. To add merge fields to the template select **Reporting > Insert Merge Field**.

