

# **Exa<sup>®</sup> PACS/RIS**

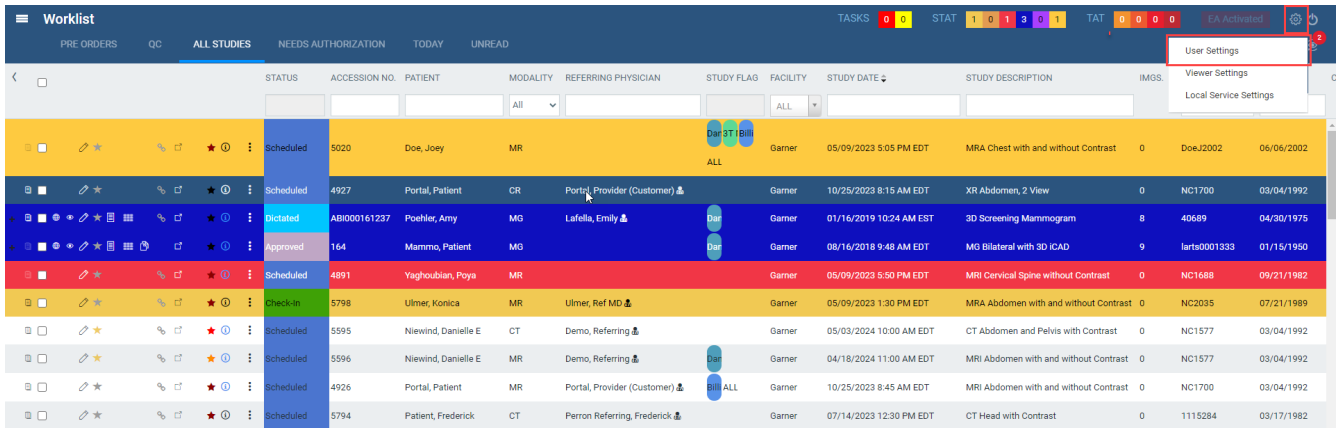
# **Workflow Guide**

## **Worklist and Viewer**

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## User settings

To open user settings, select the **Settings** button in the upper toolbar.



User settings control how the worklist appears and functions. These settings are user-specific; they only apply when the user who configured them signs in.

**User Settings**
✕

SAVE

**Column Order**

- Status
- Patient
- DOB
- Accession No.
- Modality
- Study Description
- Study Date
- Account No.
- Referring Ph
- Facility
- Reading Physician
- Stat
- Imgs.
- Approving Physician
- Approved Date

**User Settings**

- Show Row Number
- Show Priors
- Show QC
- Show Orders Tab
- Auto-Open New Order
- Auto-Open Appointment Confirmation

**Double-Click Behavior**

- Double-Click (Scheduled)
- Default Tab
- Default Filter (Local Cache)
- Default Column
- Sort By

**Web Viewer**

- Edit Order
- All Studies
- Study Date
- Desc
- 4 sec
- Off
- On
- nVoq (ExaTrans)
- Dragon (ExaTrans)
- Dictation (WebTrans)
- Off (None)
- nVoq (ExaTrans)

**Voice Recognition**

**Dragon (Exa Trans)** – Opens Dragon in Exa Trans

**Dictation (Web Trans)** – Opens Exa Dictation/WebTrans

**Off (None)** – Does not open a voice recognition tool.

**nVoq (Exa Trans)** – Open nVoq in Exa Trans

**Show Priors** – Shows the patient's priors when selecting the + icon on the worklist.

Drag to rearrange columns on the worklist into the desired order.

Select or clear checkboxes to show or hide worklist columns.

Change the default tab that the worklist defaults to

Select the default column to sort the worklist by, and the order

## Worklist

Customize the worklist's appearance and functions.

Filters and custom filters appear across the top and/or in the dropdown menu

Reorder the columns by dragging left or right

Type or select criteria in the boxes under the column headers to search and filter the worklist.

The arrows indicate the current sorting column. Click the column header to reverse the sort order.

STATUS	ACCESSION NO.	PATIENT	MODALITY	REFERRING PHYSICIAN	STUDY FLAG	FACILITY	STUDY DATE	STUDY DESCRIPTION	IMGS.	ACCOUNT NO.	DOB
		Doe, Joey	MR	Bar ST Hill	Garner		05/09/2023 5:05 PM EDT				
		Portal, Patient	CR	Portal, Provider (Customer)	Garner		10/25/2023 8:15 AM EDT				
	0161237	Poehler, Amy	MG	Lafella, Emily	Garner		01/16/2019 10:24 AM EST				
		Mammo, Patient	MG		Garner		08/16/2018 9:48 AM EDT				
		Yaghoobian, Poya	MR		Garner		05/09/2023 5:50 PM EDT				
Check-in	5798	Ulmer, Konica	MR	Ulmer, Ref MD	Garner		05/09/2023 1:30 PM EDT	MRA Abdomen with and without Contrast	0	NC2035	07/21/1989
Approved	5595	Niewind, Danielle E	CT	Demo, Referring	Garner		05/03/2024 10:00 AM EDT	CT Abdomen and Pelvis with Contrast	1	NC1577	03/04/1992
Scheduled	5596	Niewind, Danielle E	MR	Demo, Referring	Garner		04/18/2024 11:00 AM EDT	MRI Abdomen with and without Contrast	0	NC1577	03/04/1992
Scheduled	4926	Portal, Patient	MR	Portal, Provider (Customer)	Garner		10/25/2023 8:45 AM EDT	MRI Abdomen with and without Contrast	0	NC1700	03/04/1992

- Expands to **Show Priors** for the patient (must be turned on in **User Settings**)
- Opens a custom filter that displays the patient's prior studies.
- Selects the study for further actions.
- Opens the study in the viewer. This icon will only appear if there are images available.
- Open Exa Trans or WebTrans depending on what is selected under **Voice Recognition** in the **User Settings**
- Opens the multi-panel, which shows notes, prior reports, and more.
- Opens the **Approved Report** of the study.
- Allows the linking and unlinking of reports.
- Appears if there is **Unread DICOM**, select to view unread images.
- Appears if the study is opened by another user. Hover over to view the user.

## Upper and lower toolbar

The **STAT Level** bar indicates how many studies are at each STAT level on your current tab/filter. STATs are placed at the top of the worklist.

The **Turnaround Time (TAT)** bar shows the number of each study at each TAT.

Opens **User Settings** and **Viewer Settings**

Signs user out of Exa PACS/RIS.

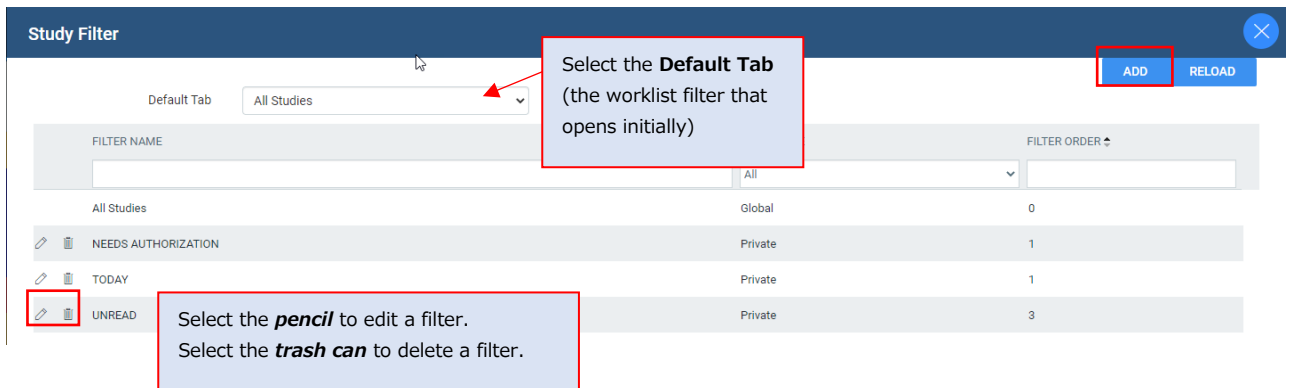
- Refreshes the worklist but keeps manually entered worklist filters.
- Refreshes the worklist but clears any manually entered worklist filters.
- Opens a window to add, edit, and delete filters.
- Opens the disagreement queue for Peer Review

## Create a filter

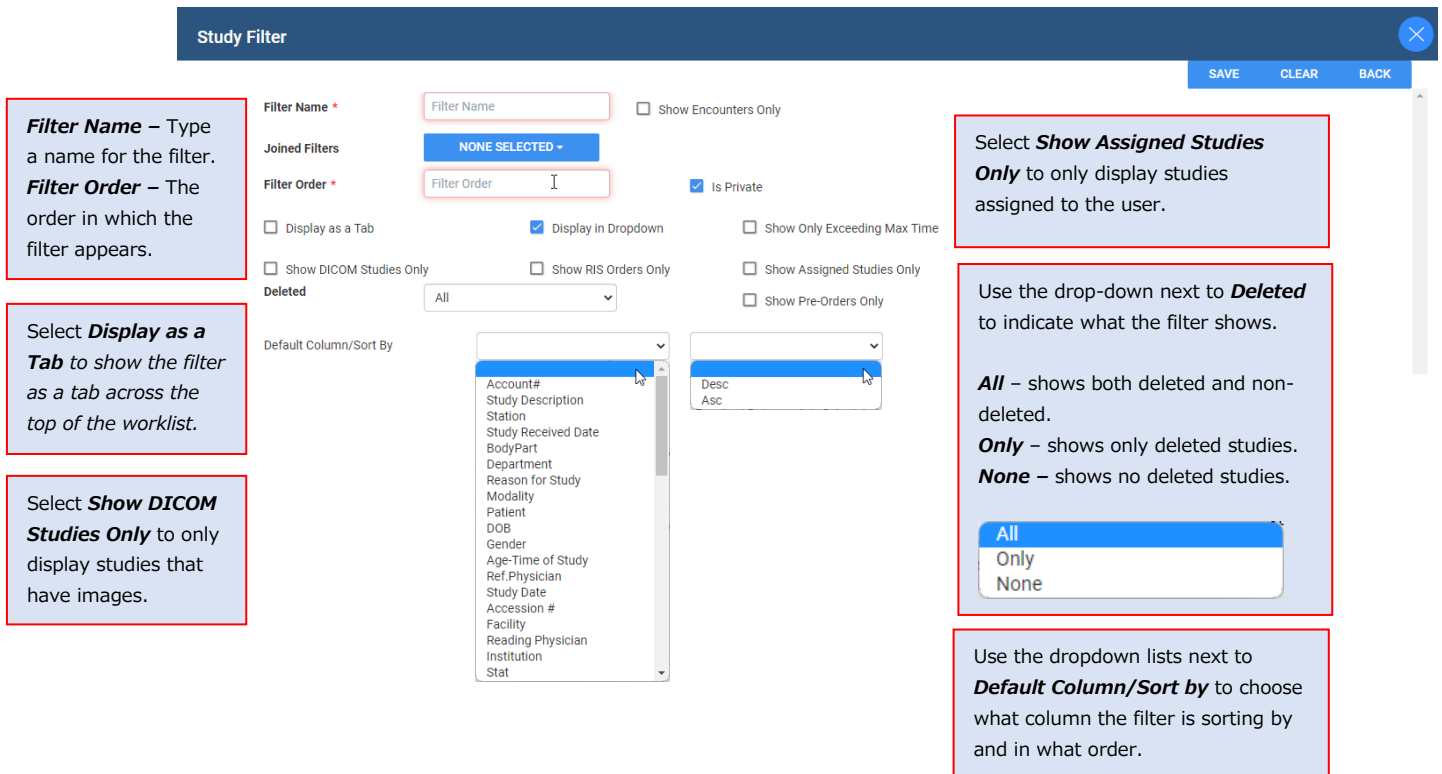
1. To create a filter, select the **Filter** button on the lower toolbar.



2. In the **Study Filter** screen, select **Add**.



3. Enter the **Filter Name** and **Filter Order** first. Then enter other criteria for the filter.



## Date/time

**DATE/TIME**

**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

Select what type of date the filter is looking at under **Date Operations By**.

**Preformatted** – Use the dropdown to select from a list of preformatted dates and date ranges.

- Yesterday
- Today
- Tomorrow
- Last 7 Days
- Last 30 Days
- Last Month
- Next 7 Days
- Next 30 Days

**Last/Next** – Use the empty field to enter a number and use the dropdown to select from a list of units of time.

- Hour(s)
- Day(s)
- Week(s)
- Month(s)
- Year(s)

**Date From/Date To** – Select the calendar button to open a calendar view to select a date or type in the desired date. Select the clock button to select a time.

## Patient information

**PATIENT INFORMATION**

**Patient Name**

- Is
- Is Not
- Contains

**Account No.**

- Is
- Is Not
- Contains

**Alt Account No**

- Is
- Is Not
- Contains

Is/Is Not/Contains

**Is** – Includes the Name/Account No./Alt Account No. that is typed out. It must match exactly to how it appears on worklist to be included.

**Is Not** – Excludes the name/account no./alt account No. that is typed out.

Type out the **Patient Name, Account No., or Alt Account No.** that you wish to include/exclude on the filter. Select + to add it to the list.

The **Patient Names, Account No., and Alt Account No.** that have been added to be included/excluded appear here. Use the trash can icon to remove from the list.

## Study information

DATE/TIME

PATIENT INFORMATION

**STUDY INFORMATION**

RESOURCE

INSURANCE

**Institution**

Is  Is Not

Contains

**Modality**

Is  Is Not

**Modality Room**

Is  Is Not

**Last call category**

Is  Is Not

**Body Part**

Is  Is Not

**Facility**

Is  Is Not

**Ordering Facility**

Is  Is Not

**Status**

Last Changed By Me

Is  Is Not

**Stat**

Is  Is Not

**Flag**

Is  Is Not

**Study Description**

Is  Is Not  Contains

**Last call note**

Is  Is Not  Contains

**Vehicle**

Is  Is Not

**DICOM Study ID**

Is  Is Not  Contains

**Accession No.**

Is  Is Not  Contains

**Report Queue Status**

Is  Is Not

**Report Delivery Method**

Is  Is Not

Filters can be created using **Facility, Modality, Status, Study Description** and more.

To select one or more option from the category, hold down Shift on the keyboard while selecting multiple options.

**Is/Is Not/Contains**

**Is** – Includes the category that is selected.

**Is Not** – Excludes the category that is selected.

**Contains** – Includes the category that contains the word/segment/phrase that is typed out.

## Resource

Filters can be created using various resources such as **Reading Physician, Approving Physician, Referring Physician** and more.

Use **Is** or **Is Not** to include or exclude the resource.

Select the dropdown menu to choose between **Select, Contains** or **Blank**.

**Select** – Includes/excludes resource that matches exactly to what is typed in.  
**Contains** – Includes/excludes resource that contains the name/segment/phrase typed in.  
**Blank** – Includes/excludes if the category is blank.

Use the + icon to add the resource to the list that is to be included or excluded.

Resources that have been added to be included/excluded appear here. Use the trash can icon to remove from the list.

## Insurance

Filters can be created using **Insurance Provider, Insurance Provider Type** and **Insurance Authorization** status.

Use **Is** or **Is Not** to include or exclude the category options.

Use the + button to add to the list of options to include or exclude.

If selecting one than more option, hold Shift on the keyboard and then select multiple options.

## Basic viewer navigation

To open the Exa PACS/RIS viewer, select the **DICOM Viewer** button or double-click on the study on the worklist.

The header displays patient and the current study information.

**Main Toolbar** – Tools and other functions/settings can be set here. If the number of tools exceeds the available space, hover over to access the additional rows of tools.

**Partial Close**  
**Close Study**

The **Priors Bar** shows all the patient's priors. Double-click to open or close the thumbnails for the prior.

The **DM toolbar** shows hanging protocols that are applicable to the current exam and options to save, manage and more.

The **Thumbnail Bar** shows the thumbnail series for the current study and any priors study opened. The red dotted line around the thumbnail indicates the active series in the viewer. The yellow dotted lines around the thumbnails indicate that the series is opened in the viewer.

Right-click to open the **Context Menu** with tools and other functions.

Hover over the top, left, and bottom of each frame opens floating toolbars.