



# **Exa PACS/RIS**

## **1.4.32\_P9**

### **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

<b>R<sub>x</sub></b> Only	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
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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

## System requirements

The following are the minimum system requirements for clients of Exa Patient Portal.

### Workstation - User

Component	Specification
CPU	Intel® Core™ series, 4 cores, 8 threads @ 3.0 GHz
RAM	8 GB
Graphics	Integrated - Intel Iris Xe Graphics card must be compatible with and support required resolution on each display, as well as total resolution for all displays.
NIC	Single 1000 MB/s
Storage	SDD, 256 GB
OS	Windows 11 Pro
Display	16:9 Aspect Ratio, 1920 × 1080

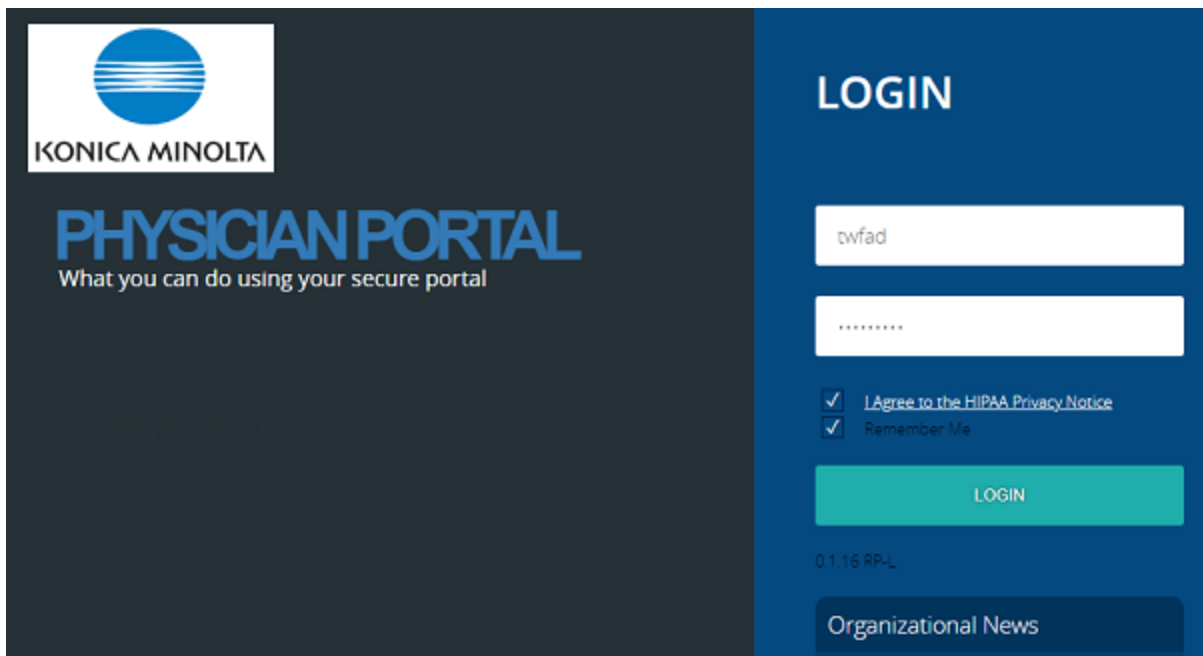
## Getting started with Physician Portal

### 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).

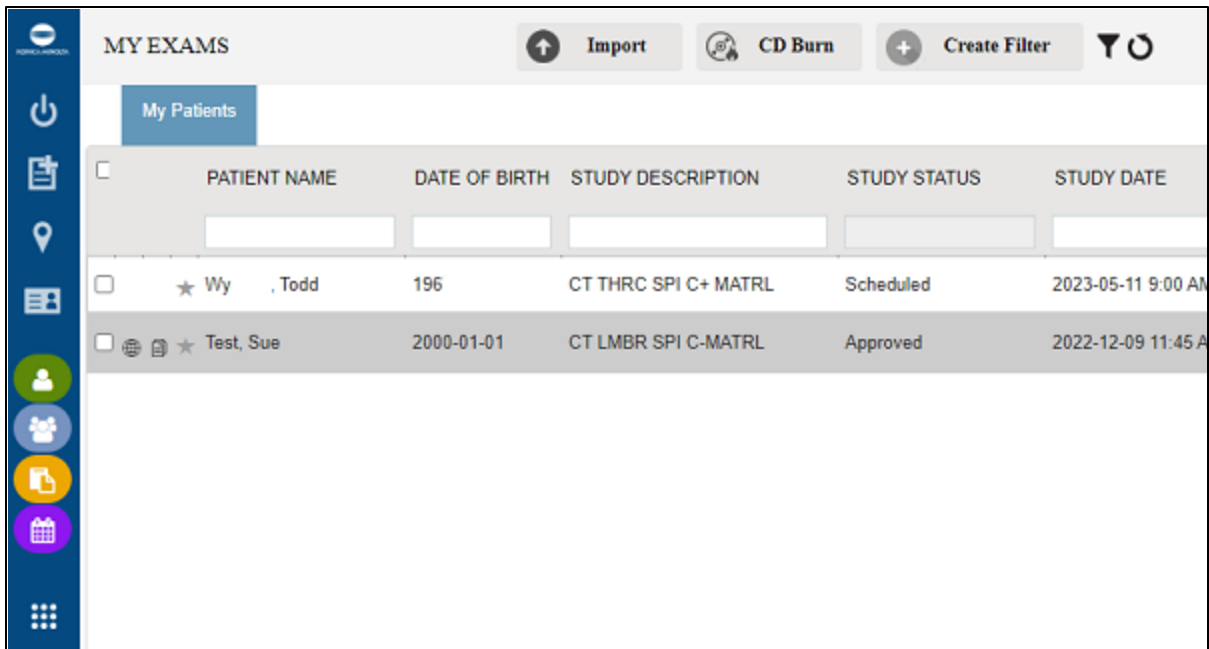
### Sign in to Physician Portal

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



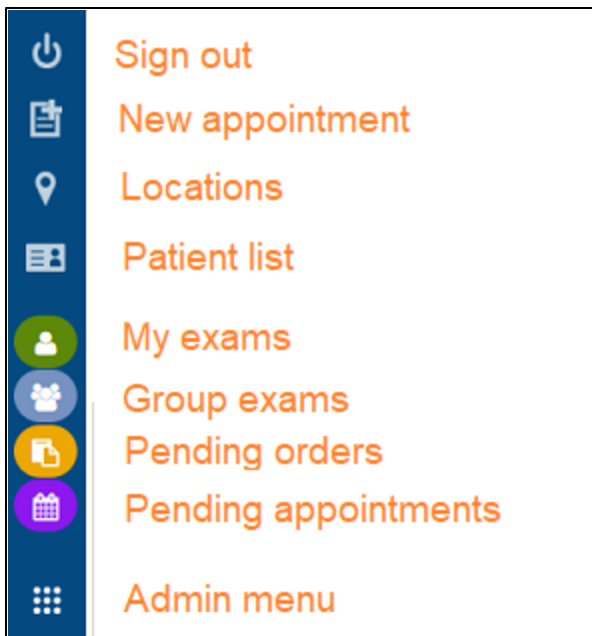
2. On the right pane, type your sign-in credentials, select **I Agree to the HIPAA Notice**, and then select **LOGIN**.

**Result:** The Portal opens to the My Exams worklist, showing all exams with which you are associated.




### Navigation bar

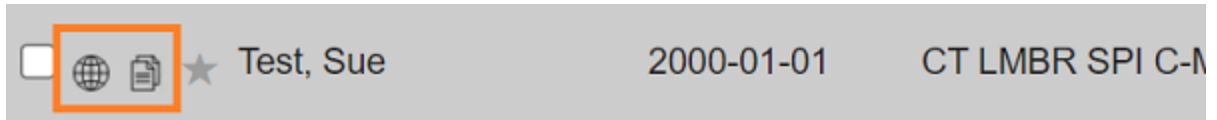
The navigation pane always appears on the left side of the screen, giving you quick access to main features.





## Open images and approved reports

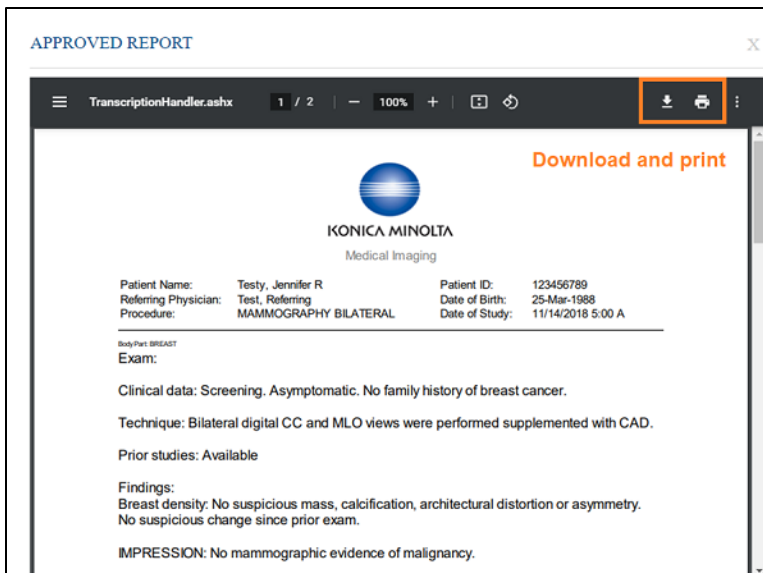
You can open images and reports for viewing and printing.

1. Select  to open the **MY EXAMS** worklist.
2. Find the study of the images to view.

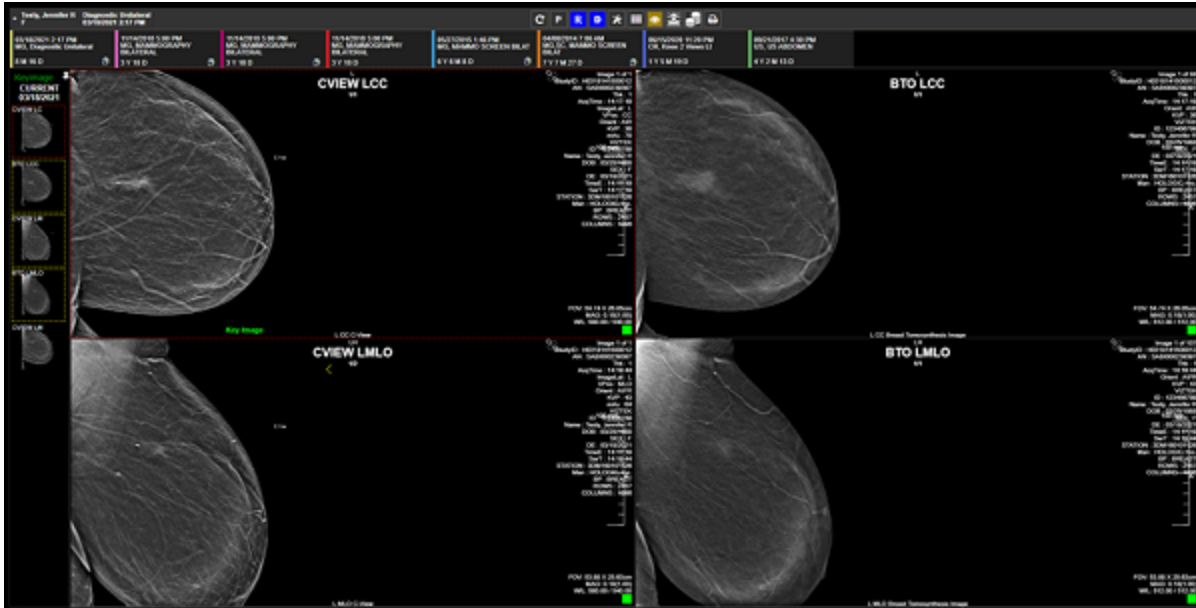


3. To view images, select the viewer  button.
4. To view the approved report, select the report  button.

### 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

You can view a worklist that includes all patients seen by all members of your provider group.


1. Select  to open the **GROUP EXAMS** worklist.



GROUP EXAMS									
PATIENT NAME	DATE OF BIRTH	STUDY DESCRIPTION	STUDY STATUS	STUDY DATE	ACCESSION NO.	FACILITY	MODALITY	REFERRING PHYSICIAN	
Garcia, Ada	01/21/1996	ABDOMEN X-RAY	Scheduled	11/09/2021 12:00 AM EST	376	Pineapple Under The Sea	Computed Radiography	Doctor, Trested	
Nuckols, Thomas	08/19/1988	Requesting Exam	Ordered		256	Konica 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, Rehner	
Test, Marc	03/25/1988	CT ABD C+/-C+	Approved	06/16/2021 4:40 PM EDT	204	Dave's Hospital	Computed Tomography	Test, Rehner	
Testy, Jennifer R	03/25/1988	MAMMOGRAPHY BILATERAL	Unread	11/14/2018 5:00 PM EST	209	Konica Minolta Healthcare Americ	Mammography	Test, Rehner	

## Pending orders and appointments

You can view a worklist of pending orders and pending appointments.

1. 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 SER
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	

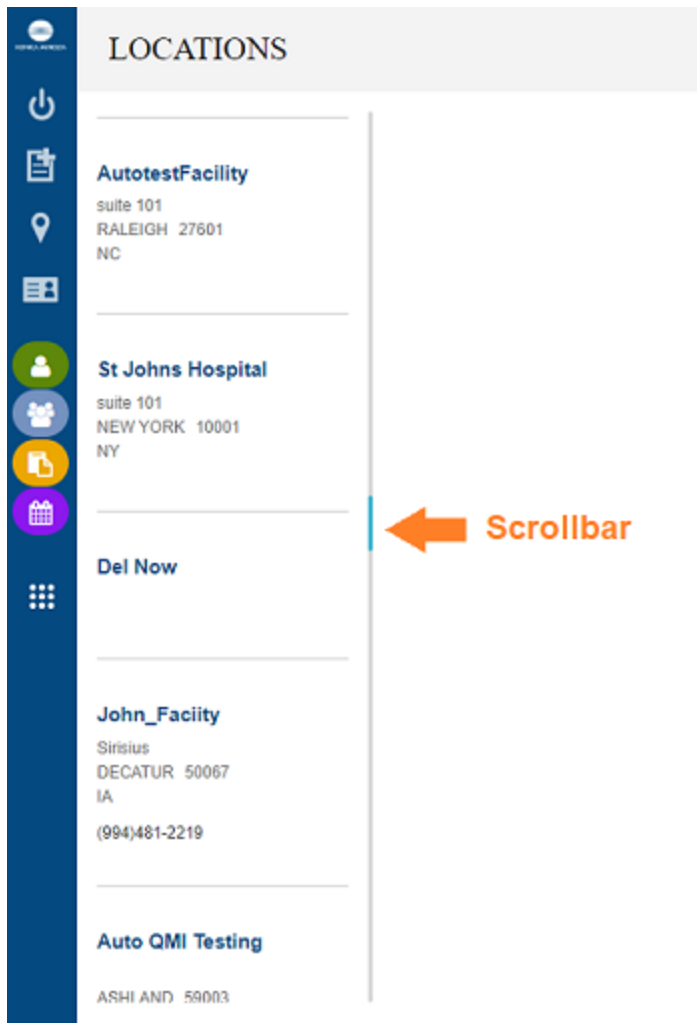
2. Select  to open the **PENDING APPOINTMENTS** worklist.

PENDING APPOINTMENTS											
PATIENT NAME	DATE OF BIRTH	STUDY DESCRIPTION	STUDY STATUS	STUDY DATE	ACCESSION NO.	FACILITY	MODALITY	REFERRING PHYSICIAN	ORDERING FACILITY	REASON	JUSTIFICATION OF SER
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.

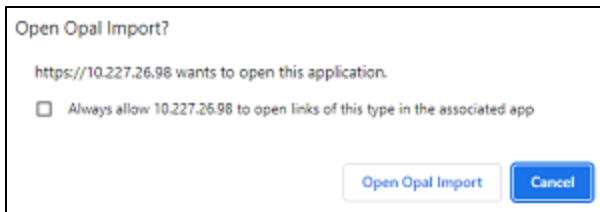


## Import images

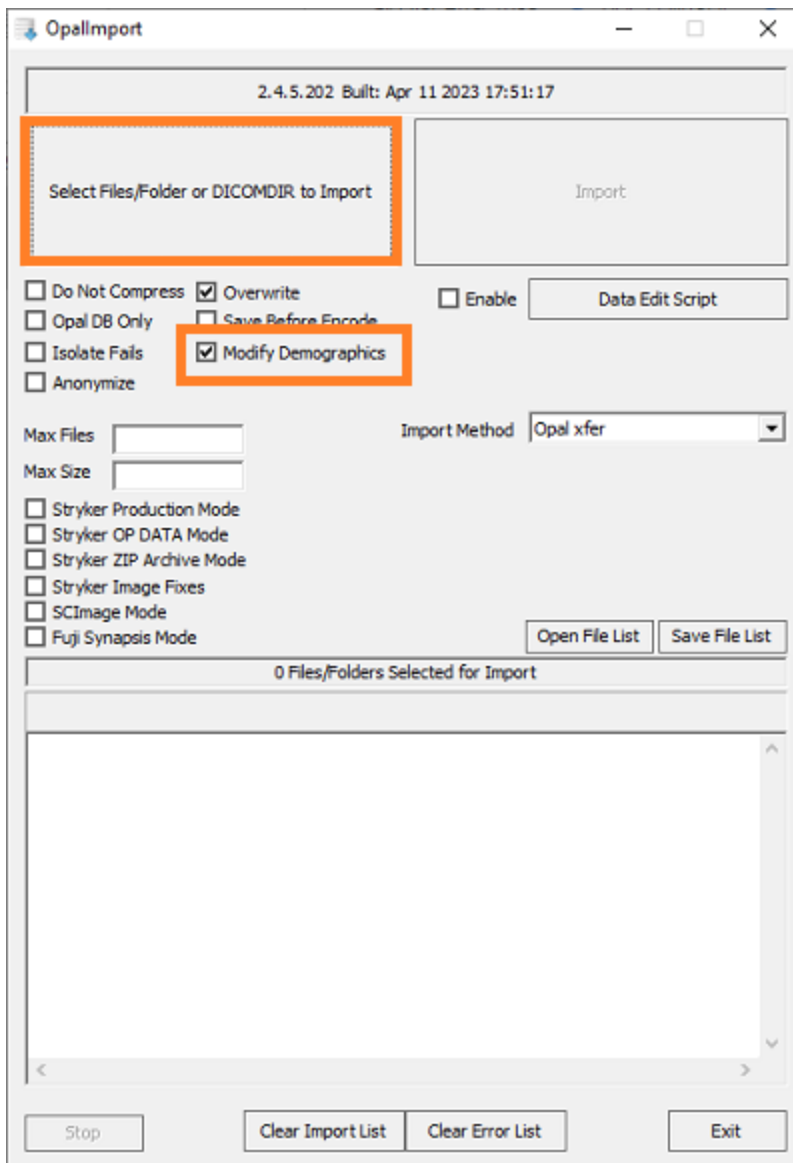
You can import images into studies, such as when a patient brings priors on a CD from another healthcare provider. Imported images appear as new studies on the My Exams worklist of the referring provider. If you or a member of your provider group were not the referring provider, you would have to "break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

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

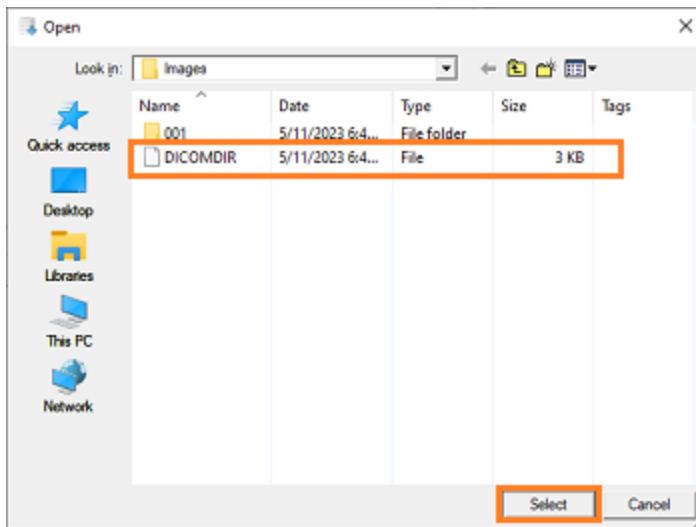




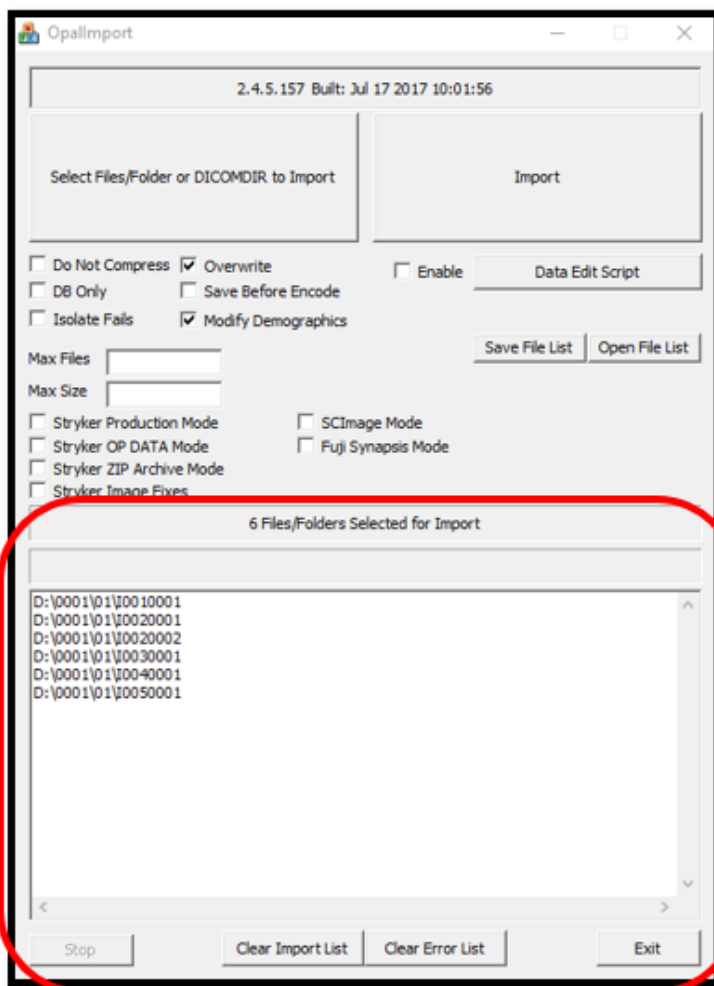
2. In the **OpalImport** window, select **Modify Demographics.**, and then select **Select Files/Folder or DICOMDIR to Import.**



3. Browse for and select the DICOMDIR file.

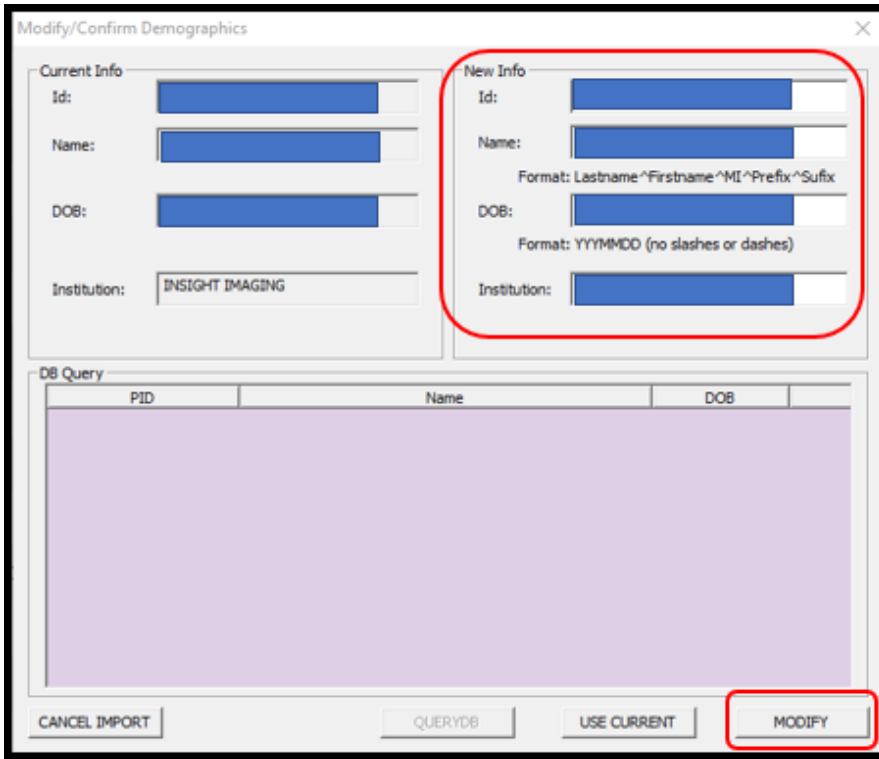


- The selected files appear in the white box, and the status box indicates the number of files selected for import.



- Select **Import**.

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



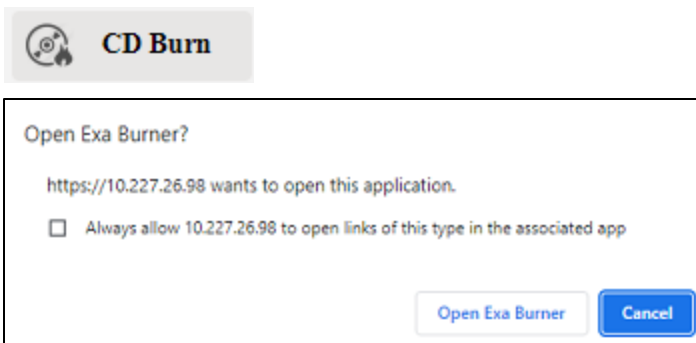
**Result:** The images are imported.

## Burn studies to media

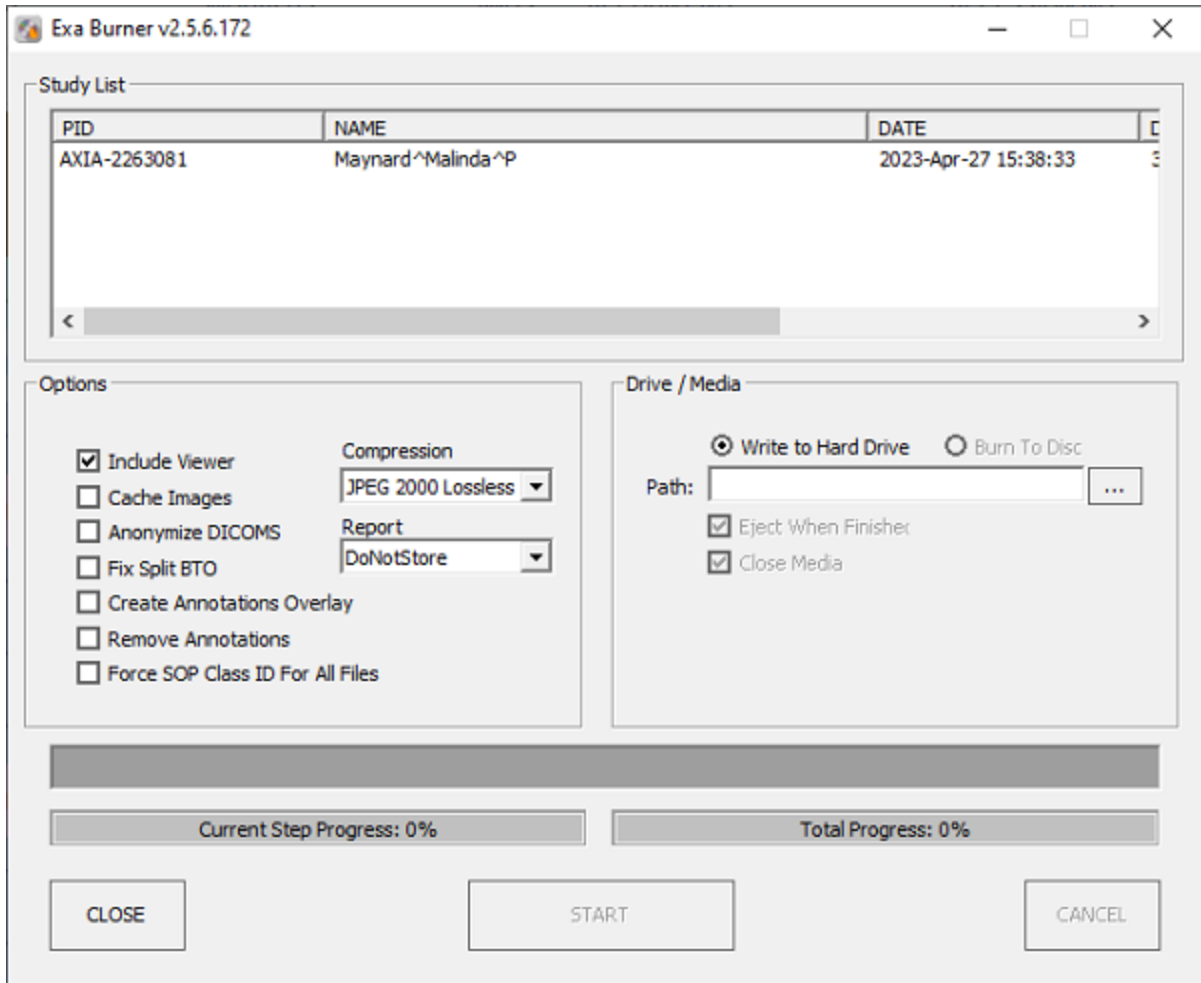
You can burn DICOM studies on the My Exam worklist to a hard disc or removable disc.

**Prerequisite:** [Install Exa Burner](#)<sup>27</sup>.

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.

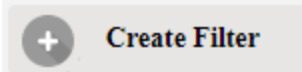
Setting	Description
Write to Hard Drive Burn to Disc	Select whether to write to the hard disc or removable disc.
Path	Select the ellipsis button and then browse for and select a destination drive and/or path.
Eject When Finished	Select to eject the disc after burning.
Close Media	Select to finalize the media after burning so that it is no longer available for writing.

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

## Create 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" :

**FILTER SETTINGS** X

Filter Name:

Filter Columns	Filter Values
<input checked="" type="checkbox"/> Patient Name	<input type="text" value="W"/>
<input type="checkbox"/> Date of Birth	<input type="text"/>
<input type="checkbox"/> Study Description	<input type="text"/>
<input type="checkbox"/> Study Date	<input type="text"/>
<input type="checkbox"/> Accession No.	<input type="text"/>
<input type="checkbox"/> Referring Physician	<input type="text"/>
<input type="checkbox"/> Facility	All <input type="button" value="v"/>
<input type="checkbox"/> Modality	All <input type="button" value="v"/>
<input type="checkbox"/> Study Status	Please select


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

**EXAMS**





PATIENT NAME	DATE OF BIRT	STUDY DESCRIPTION	STUDY STATUS	STUDY DATE	ACCESSION N	FACILITY
W						All
★ W, Todd	196	CT THRC SPI C+ MATRL	Scheduled	2023-05-11 9:00 AM EDT	30303	My Compa

### Open a patient chart

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

1. Select  to open the patient list.




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

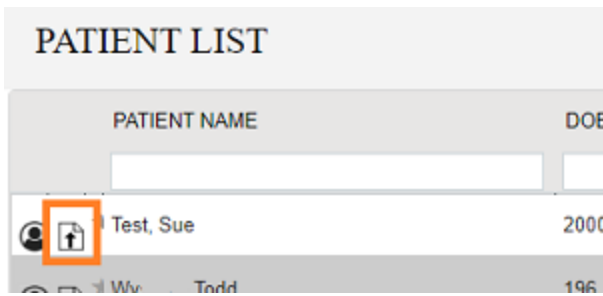
2. Double-click a patient to open the patient chart.

PATIENT DASHBOARD		
Patient Demographics	Alerts	Results
<p>First Name   Middle Name   Last Name   Suffix</p> <p>Todd   -   Wy   -</p> <p>DOB   Sex   Language</p> <p>196   M  </p> <p>Race   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

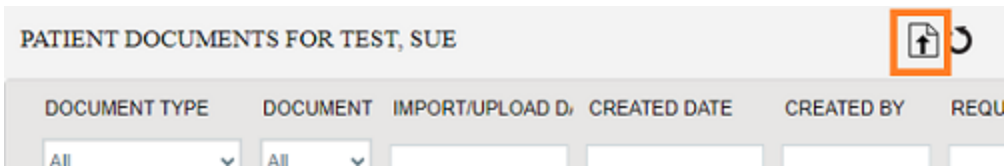
## Attach a document to an exam

You can add a scanned document (such as an order form) to an exam.

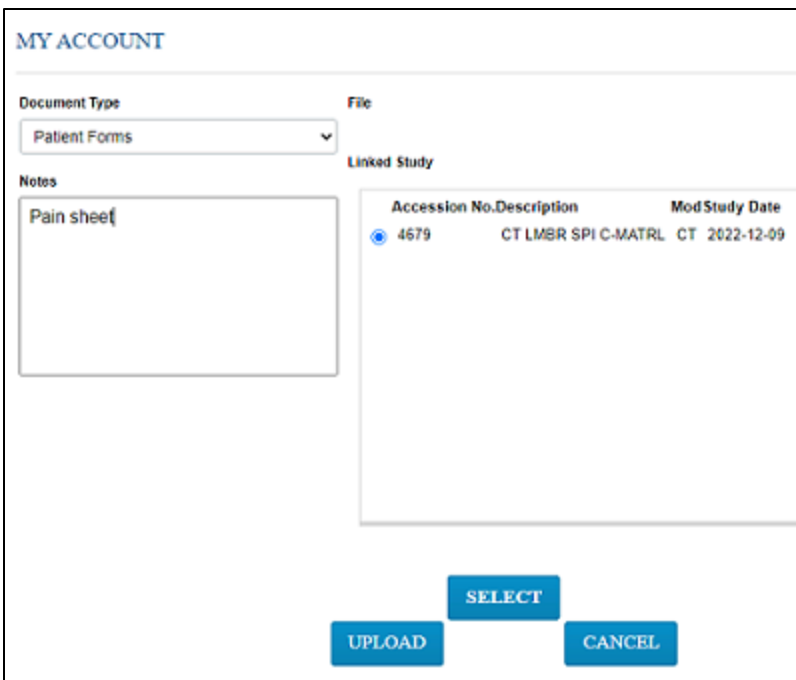
1. Select  to open the patient list.
2. In the Patient List, in a patient row, select the **Upload Patient Document** button.



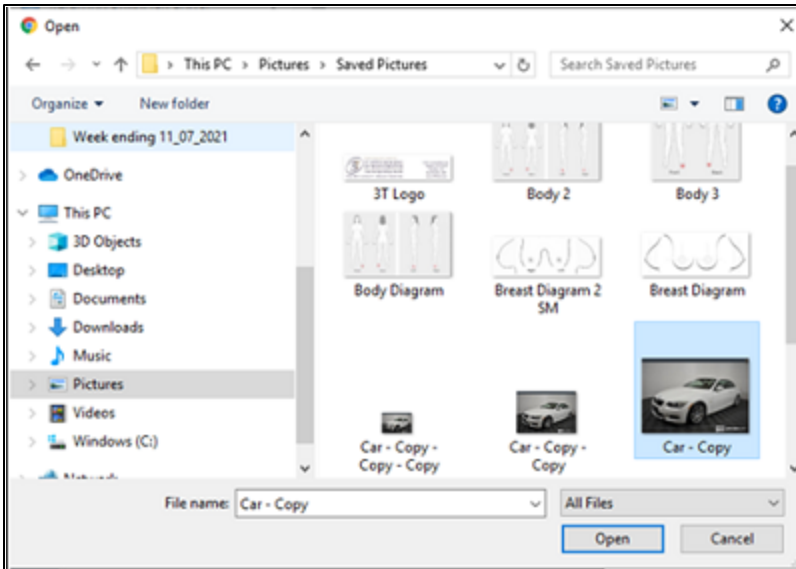
- In the patient document window, select the **Upload Patient Document** button.



- In the **MY ACCOUNT** window, select a document type.



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



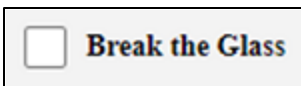
8. Select **UPLOAD**.

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

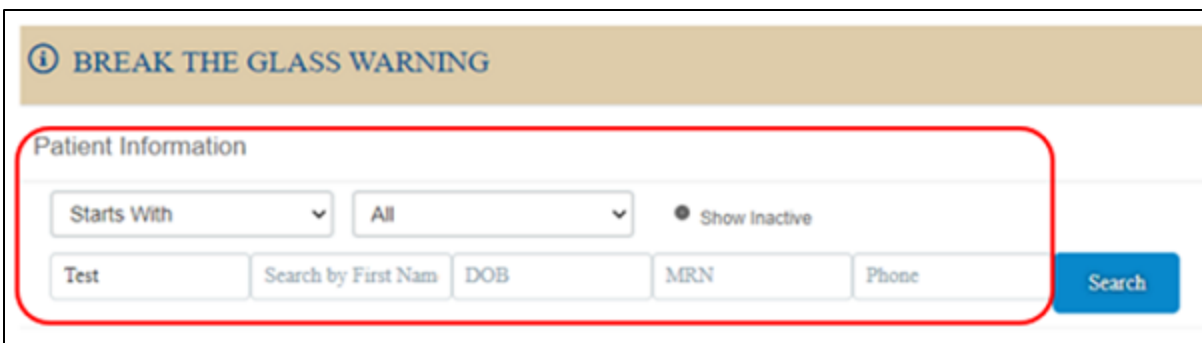
### Break the Glass

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. Select the **Break the Glass** checkbox.



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



**Result:** Matching patients appear in the list.

i **BREAK THE GLASS WARNING**

Patient Information

Starts With All ● Show Inactive

test Search by First Nam DOB MRN Phone Search

<b>Test, Nuclear M NMTes001</b> DOB: 10/06/1981
<b>Test, Jenn TesJ1001</b> DOB: 03/25/1988
<b>Test, Mawc MAWC1</b> DOB: 03/25/1988
<b>Testy, Jennifer R 123456789</b> DOB: 03/25/1988
<b>Test, Jenn TESJ175</b> DOB: 03/25/1988
<b>Test, Mg NCCCHIC17566</b> DOB: 11/08/1960
<b>Test, Eric tese1005</b> DOB: 01/01/1980
<b>Test, Barry 1234321</b> DOB: 10/10/2010
<b>Test, Nicole TesN1007</b> DOB: 01/01/2000
★ <b>Test, Twana 654e</b> DOB: 12/12/2001

3. Double-click the patient whose chart you want to open.

i **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

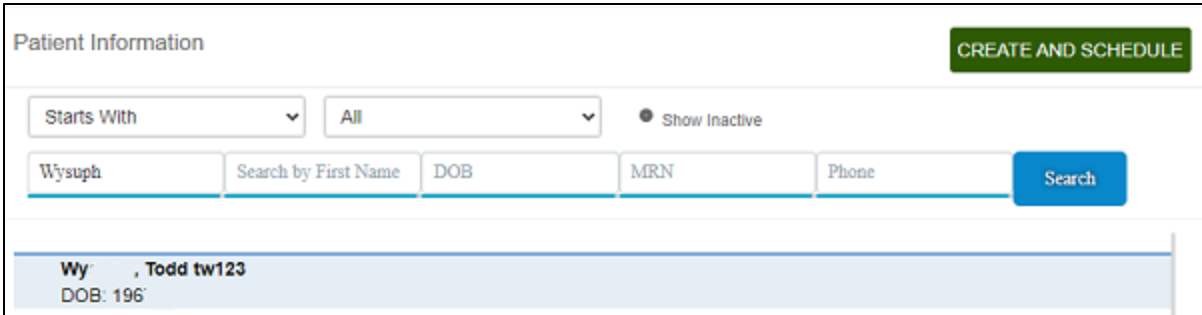
4. Select your **Access Reason**, enter your credentials, and then select **ACCEPT**.

## Create and schedule an exam

You can create and schedule an exam.

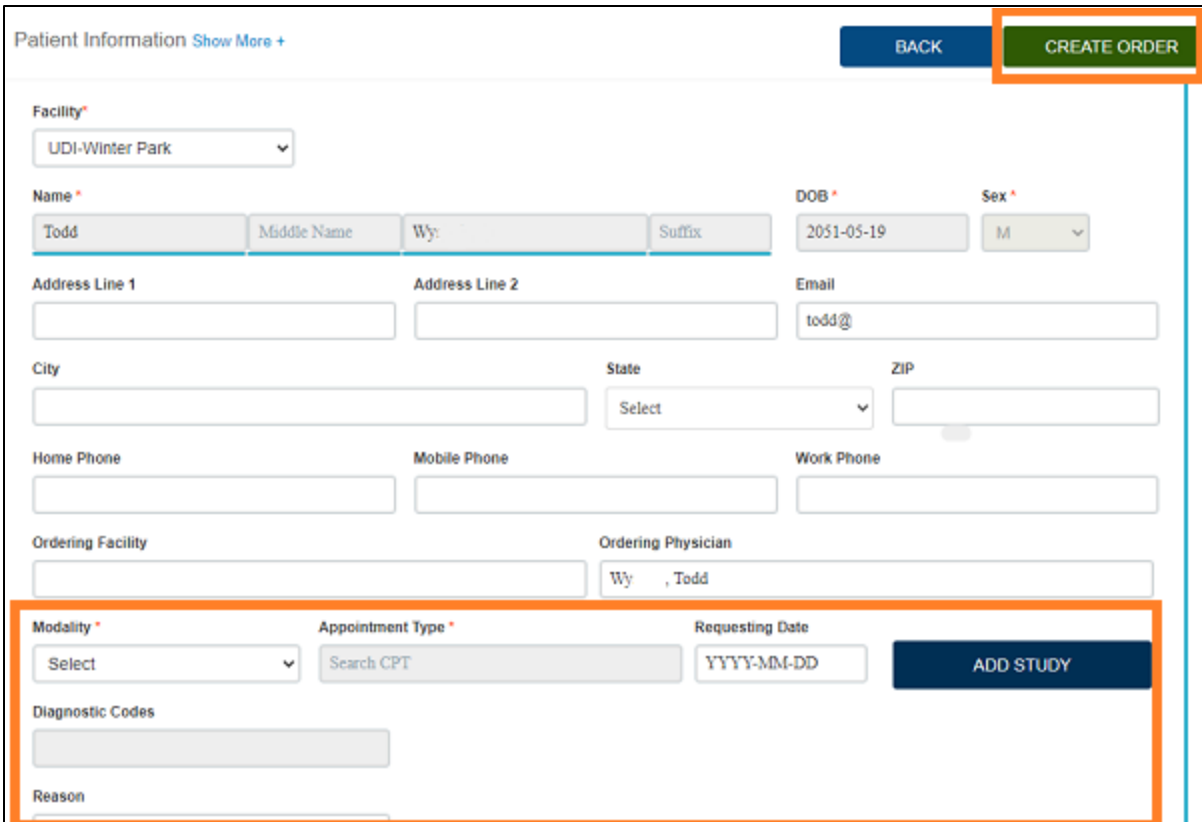
1. Select  and then do one of the following.
  - To create a new patient, select **CREATE AND SCHEDULE**, and then skip to step 3.
  - To schedule an existing patient, find the patient by entering criteria and selecting **Search**.

**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.
5. At the top of the screen, select **CREATE ORDER**.

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

Patient Details	Physician Details	Map Location
<b>Tester, Braxton O</b> DOB   GENDER : 12/16/1993   M Address Line 1 : 123 Any Street Address Line 2 : Apt# 2020 City/State/Zip : RICHARDSON, TX / 75082 Home Phone# : (210)111-4444 Mobile # : (210)222-5555 Work Phone# : (210)666-8888 Email : email@gmail.com	<b>Doctor, David</b> Address line 1 : 123 Any Street Address line 2 : City/State/ZIP : RICHARDSON / TX / 75082 Phone no : Fax no :	
<b>Appointment Details</b> Your order has been created successfully Location : Eric's Best Practice      Type : Pre Order Date :      Status : Ordered		
<input type="button" value="PRINT"/> <input type="button" value="UPLOAD"/> <input type="button" value="CLOSE"/>		

6. Optional. To attach a document, select **UPLOAD**.
7. Select **CLOSE**.

## About CDSM and AUC

The Protecting Access to Medicare Act (PAMA) of 2014 requires practitioners of advanced diagnostic imaging services such as CT, PET, NM, and MRI to consult a qualified *clinical decision support mechanism* (CDSM) before ordering exams for Medicare patients. CDSMs are online apps that use *appropriate use criteria* (AUC) to determine whether exams are clinically relevant (or, "appropriate"). By purchasing a license, Exa Patient Portal can offer access to the LogicNets CDSM app through Physician Portal.

## Create an order with CDSM

When creating orders for advanced imaging (CT, MR, NM, or PT), physicians can use CDSM to determine relevance for Medicare requirements.

**Prerequisite:** Obtain a license for CDMS functionality through your Konica Minolta representative.

### Procedure

1. Follow the standard steps to create and schedule an exam, but on the **Patient Information** screen, select **Show More**.

The screenshot shows a 'Patient Information' form. At the top right, there is a 'Show More +' button with a plus sign, which is highlighted by an orange rectangular box. Below this, the 'Facility' field is a dropdown menu currently showing 'UDI-Winter Park'. The 'Name' field is partially visible below it.

- and then enter the following settings as applicable.

Setting	Description
Facility	Select your facility.
Name	Type the name of the patient.
Address, Email, Phone	Type or select the address, email address, and phone numbers of the patient.
Ordering Facility	Type the ordering facility.
Ordering Physician	Type the name of the physician ordering the exam.
Modality	Select Computed Tomography, Magnetic Resonance, Nuclear Medicine, or Positron tomography.
Appointment Type	Select an appointment type available for the modality.
Requesting Date	Type the date on which you want to perform the exam.
Account No./Alt	Type the patient's account number, PID, MRN, or alternate account number (auto-filled for existing patients).
Place of Service	Select a place of service.
Transportation	Select the mode of transportation the patient uses to go to the exam.
Referral Number	For referrals, type a referral number.
Patient Condition	Select the patient's expected condition on exam day.
Patient Location	If the patient is hospitalized, select the department.
Patient Room No.	If the patient is hospitalized, type the patient's room number.
Diagnostic Codes	Type in the box to dynamically search for a diagnostic code, and then select a code that matches the appointment type. You can add more than one code.
Reason	Type a reason for the exam.
Schedule Notes	Type notes for the scheduling staff.

- Select **ADD STUDY**.
- Optional. Repeat the previous steps to add another study.

5. Select **CREATE ORDER**.
6. If the **AUC Requirement** message appears, if the patient has Medicare insurance, select **YES** (or select NO to skip CDSM).
7. On the **LogicNets Decision Engine** page, answer the questions to obtain a determination.
8. If the CDSM recommends one or more different CPT codes, follow the on-screen instructions to change the codes and match them with appointment types. Select **OK**.
9. On the **Order Summary** page, select to **PRINT** or **UPLOAD** the summary, and then select **CLOSE**.

## View the audit log

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

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



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

 A screenshot of the 'AUDIT LOGS' page. The page has a dark blue sidebar on the left with icons for power, document, location, and a grid. The main content area has a header 'AUDIT LOGS' and a refresh icon. Below the header is a table with columns: 'LOGGED DATE', 'SCREEN', 'PATIENT NAME', and 'LOG DESCRIPTION'. The 'LOGGED DATE' column has a date range filter '2023-05-09 - 2023-05-11'. There are three rows of data, each with a 'View' link.
 

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"

2. 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

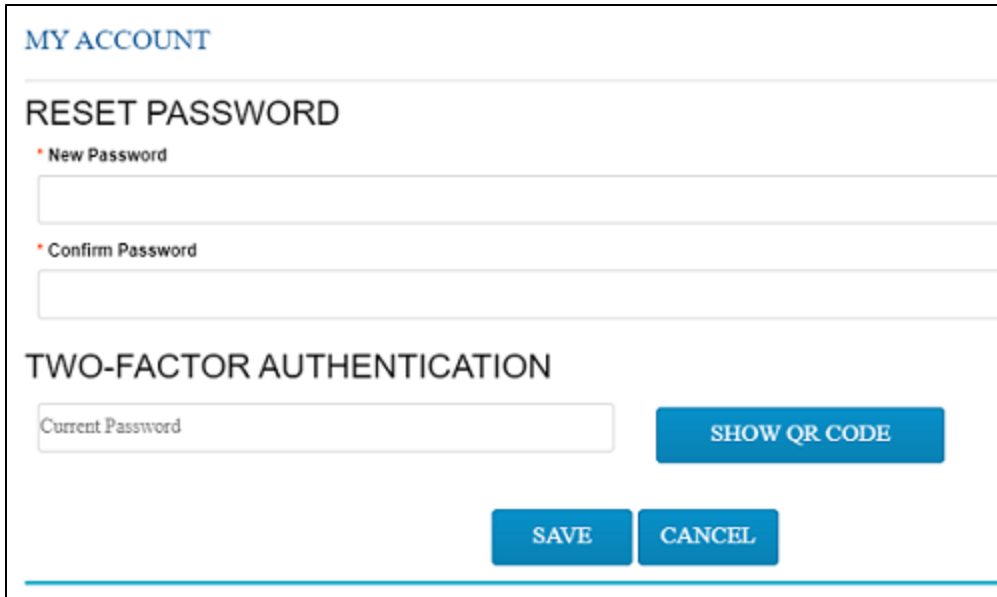
## Configure passwords and two-factor authentication

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.

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



2. 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 "ZRHCPQQT02BRFP775Q2LR23IQNEETZ4WXCCQYY7K". 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 profile

You can edit your 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.

A screenshot of a web form titled "MY ACCOUNT" with a close button (X) in the top right corner. The form is divided into sections. The first section is "Edit User Settings" with an "Email:" label. Below this is a "Name" section with four input fields: "Todd", "MI", "Wy", and "Suffix". The next section is "Title", "Dr. Office Name", and "Phone No." with three input fields. The following section is "NPI No.", "Federal Tax ID", and "Taxonomy Code" with three input fields. The next section is "EIN No.", "SSN", and "Medicare UPIN" with three input fields. The final section is "License No.", "Medicaid Provider No.", and "Medicare Provider No." with three input fields. At the bottom of the form are two blue buttons: "SAVE" and "CANCEL".

2. Edit settings and select **SAVE**.

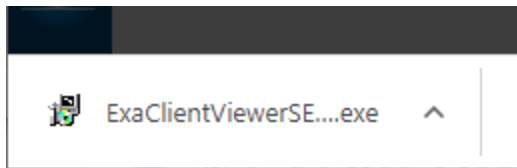
## Install Exa Burner

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.

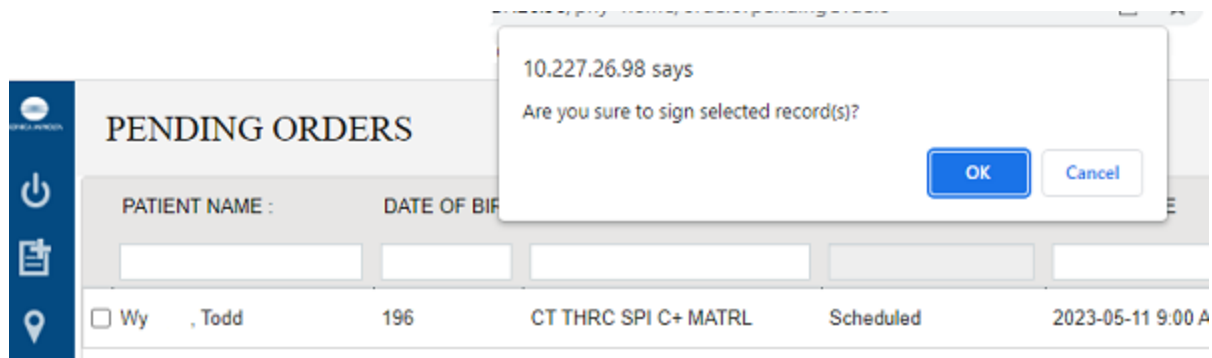


2. Select the file to run, and follow the on-screen prompts.

## Sign an order

If staff configured a graphical signature file for you, you can add it to orders here. Your signature will appear 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.



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.