InteleOrchestrator

4.5 | User Guide

intelerad

Intelerad.com

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Title:	InteleOrchestrator User Guide
Software version:	4.5 (Multiple Patient Multiple Use)
Date:	2024-12-24
Part number:	CLSWEN4.5.0UG-O Issue 005

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1

GETTING STARTED

This section details how to log in to InteleOrchestrator, select a shift, install the correct version of Extender for your dictation microphone, and describes the layout of the InteleOrchestrator user interface.

In this chapter:

About This Help

This help provides instructions for end users, such as radiologists and technologists, on how to use InteleOrchestrator. We recommend that you browse through the entire Help and follow the procedures at your own pace. If you are already familiar with some aspects of InteleOrchestrator, you can use this Help for reference.

Depending on your user role, geographical location, and assigned user permissions, you may not have access to all features and application interface elements described in this document.

Document Conventions

Several conventions are used throughout this document. A list of these and examples of their use are provided below.

Convention	Example
Text that you enter in a field, or on a command line are in `courier font`.	In the Date field, enter `2003/04/04`.
Keyboard commands are in **SMALL CAPS AND BOLD**.	Press **CTRL+C** to copy text.
New terminology or concepts are *italicized*.	The process of automatically distributing the images is referred to as *autorouting*.
Interface elements, such as menus, buttons, options, and preferences are **bold**.	From the **Font** list, choose the desired font.
Menu selections are separated by vertical lines.	Choose **File** | **Print** to print this page.
Information that is important for a user to know when performing a task, such as prerequisite information or restrictions, is represented with a note icon.	To view reports, you must have the Report privilege enabled in your user account.

Convention	Example
Information that is helpful to a user, such as when describing an alternate or simpler way to perform a task, is represented with a tip icon .	You can also use the **CTRL+T** keyboard shortcut to show or hide thumbnail images.
Information that warns users to potential problems in the outcome of what they are doing, such as data loss or data breach, is represented with a warning icon ⚠.	⚠ Image measurements are saved for the current application session only. If you exit the application, all measurements are lost.

Document Revisions

Each issue contains the features up to the version in the Software Version column.

Issue	Document Release Date	Software Version
001	Sep 19, 2023	4.4
002	May 21, 2024	4.5
003	Aug 01, 2024	4.5
004	Aug 30, 2024	4.5

Obtaining Printed Documentation

Intelerad offers printed and bound versions of product documentation free of charge. To request printed copies of Intelerad documentation, contact your Client Success manager. The printed documents will be provided within 7 days or less.

Comments and Questions

At Intelerad, we strive to create accurate and intuitive documentation that provides you with effective product training and troubleshooting support. To better help us develop documentation products that meet your needs, we encourage you to send your comments and questions to documentation@intelerad.com.

Contacting Intelerad Technical Support

Your PACS administrator can assist you with any issues you may encounter. If you require additional assistance, you can contact Intelerad Technical Support, 24 hours a day, seven days a week.

To contact us:	Use:
On the Internet	https://serviceportal.intelerad.com/csm
By telephone	Toll-free North America: 1-866-951-6222 Sans frais Amérique du Nord (français): 1 844-467-7227 Toll-free Australia: 1-800-286-418 Toll-free New Zealand: 0800-467-723 United Kingdom: 0113-360-2615 Other: +1-514-931-7127

These coordinates and a wealth of other information are also available on the Intelerad Service Portal.

https://serviceportal.intelerad.com/csm

You should regularly check the Intelerad knowledge base for the latest version of the documentation, as well as other product-specific resources such as TechNotes, downloads, and videos.

When you contact Intelerad Technical Support to report a problem, please have at hand the following information, as applicable:

- client code and location of your IntelePACS installation
- full error message and the steps required to reproduce the problem
- AE Titles of the affected devices
- operating systems of any affected machines
- description of the problem and when it first occurred

If the problem affects a particular study, please also provide the following:

- patient ID or patient number (M.R.N.)
- accession number/requisition number
- modality type and name

About InteleOrchestrator

InteleOrchestrator offers a functionally rich, vendor-neutral, zero-footprint worklist that aims to achieve worklist perfection for each individual radiologist in your imaging group. Designed with flexibility in mind, InteleOrchestrator ensures that the appropriate radiologist is presented with the appropriate case at the right time, regardless of the complexity or disparate nature of your environment. With the ability to launch over 50 other applications through highly-tailored and dynamic worklists, InteleOrchestrator can adapt to the unique needs of any enterprise.

InteleOrchestrator offers:

- Support for multiple image viewers to integrate disparate medical image repositories.
- "Auto-Next" reading mode that radiologists can trust to present them with the most appropriate exam, without having to return to the worklist.
- Exams distributed across the practice automatically based on real-time variables such as availability, subspecialty, workload, location, and more.
- Dynamic worklist activations to automatically show and hide overflow worklists based on criteria-driven thresholds.
- AI-enabled worklist that can be augmented with actionable data through a vendor-neutral interface.

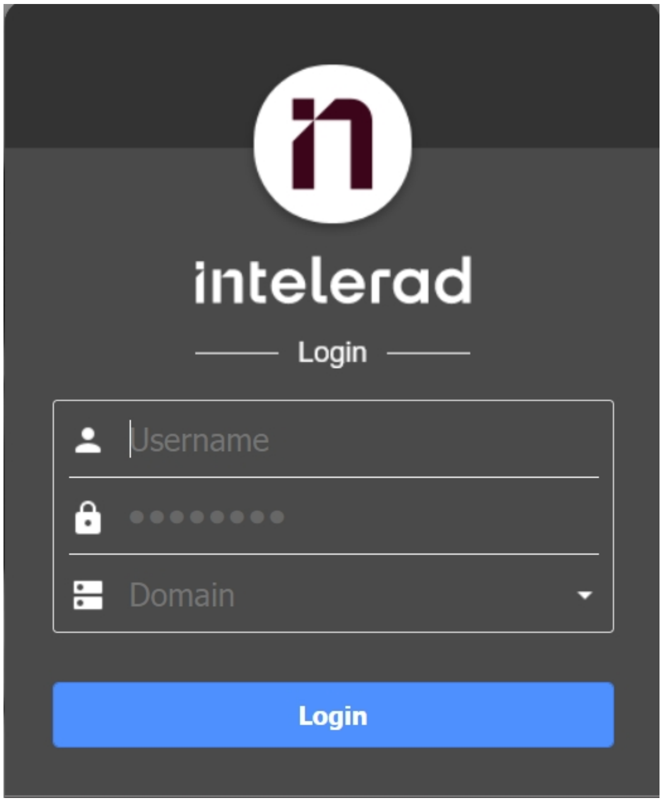
Logging into InteleOrchestrator

1. Open a web browser session and navigate to the InteleOrchestrator URL that you were provided. If you don’t know the URL contact your system administrator.

   You must include the HTTPS:// portion of the URL for proper operation of the browser.

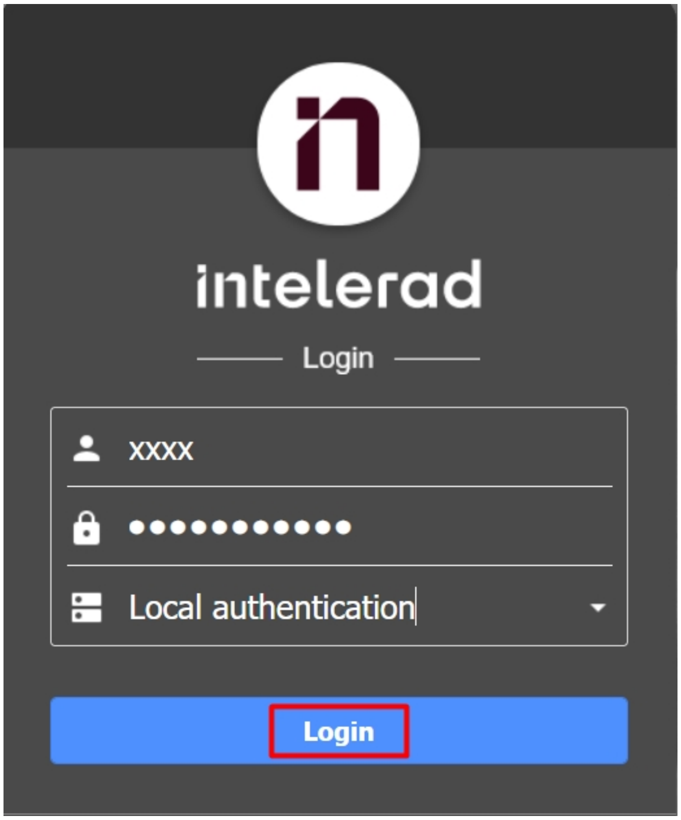
2. In the **Login** field, enter your username.

3. In the **Password** field, enter the password.



4. Select the **Domain** from the drop-down list.

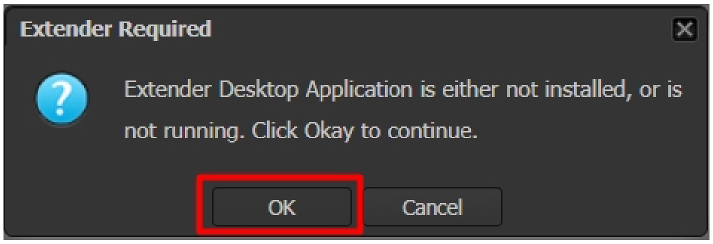
5. Click **Login**.



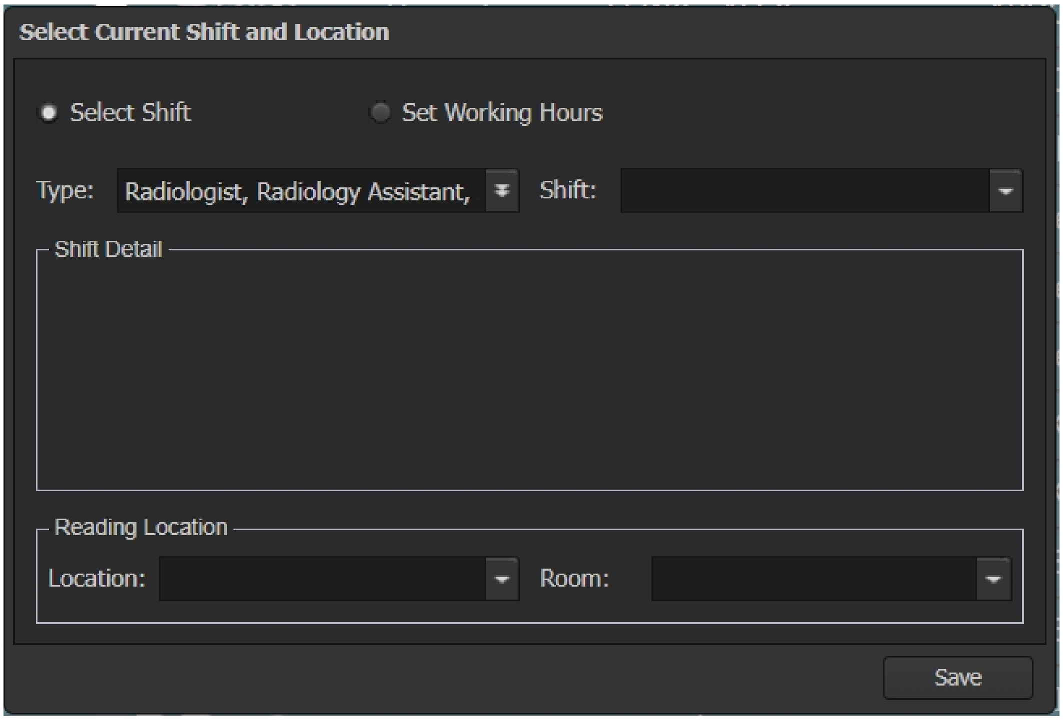
6. InteleOrchestrator software allows for several different configurations, which may affect the screen that is displayed upon your initial login. If this is the case, from the Home Page, click **Worklist**.

7. If the application prompts you to install Extender Desktop Application, Click **OK** to download. If you do not have administrator privileges on your workstation, contact

your system administrator. For more information, see “About Extender"



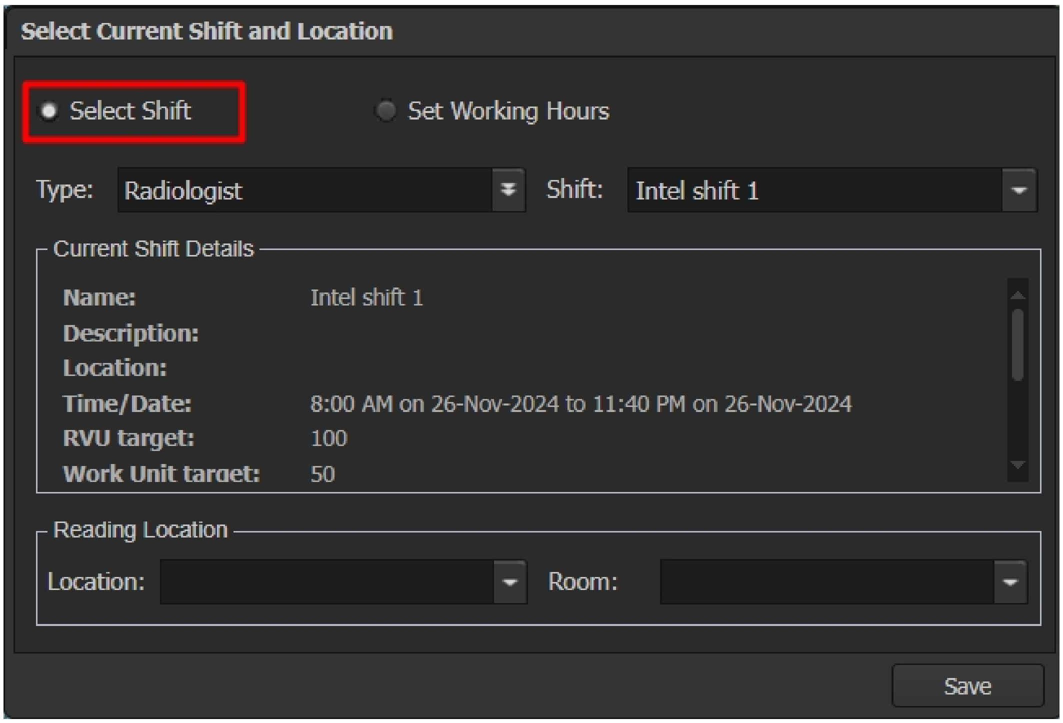
8. The application may prompt you to select your current **Shift**, **Location** and **Room** if it is not already set.



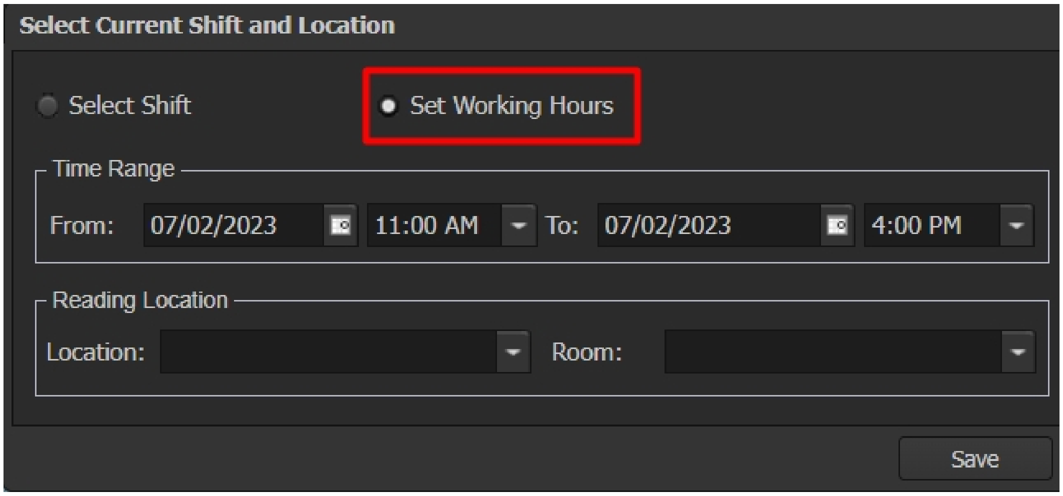
Your practice may have integrated with a scheduling software, such as QGenda or Lightning Bolt or your InteleOrchestrator system administrator has already configured shifts for you. In this case, the InteleOrchestrator will already know the shift you are working when you log in and you will not be prompted to select your shift. For more information, see “Selecting a Shift or Work Hours.”

You may be prompted to select a shift even if you had previously selected and saved a shift. This can happen if you are assigned to more than one shift. For example, you are a Radiologist who is scheduled for a call shift and a day shift. You will need to select your primary shift when you log in to start your day shift. By selecting your primary shift, you will be assigned that shift's My Reading Queue and receive work unit credits for that shift. This is important if your organization is using the Workload Gauge.

• If your group is using a shift-based workflow, select the **Type** and the **Shift**.



• If your group is not using a shift-based workflow, you can also set your working hours from this form. This may be useful to track how many hours you are working and your productivity during those hours.



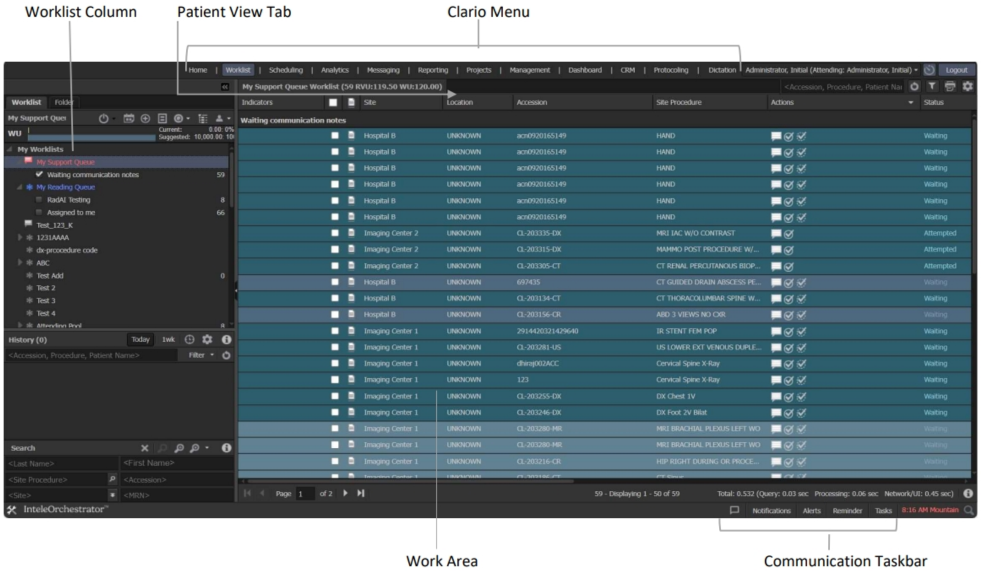
9. Once you have selected your shift or set your working hours, click **Save.**

   Your practice may require you to provide certain information on this page, such as Shift, Location, and Room. If any required information is missing, an error message will prompt you to return and provide the necessary details.

10. The InteleOrchestrator interface is displayed.

Understanding the InteleOrchestrator Interface

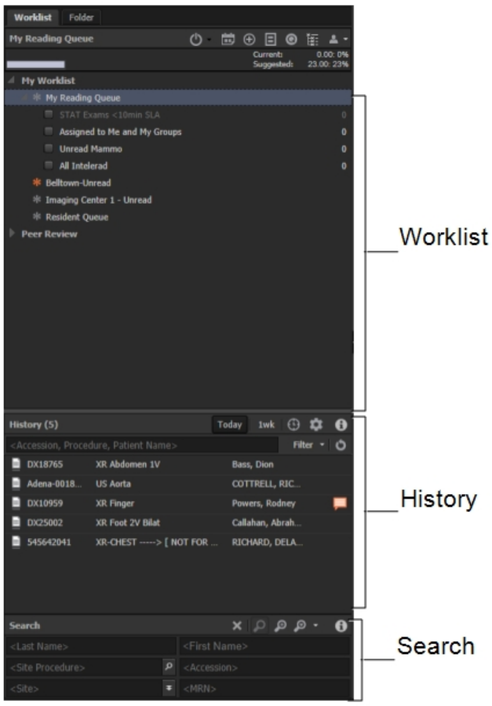
The InteleOrchestrator interface displays all of your worklists, the exams in your worklists, links to other InteleOrchestrator modules, and the means to communicate with other radiologists in your practice.



Section	Contents
Worklist Column	Displays your worklists, your exam history, and a quick search option. See “About the Worklist Column" (page 21)
Patient View Tab	Displays exams that you opened for dictation but have not completed. This allows you to return to your work quickly if you are interrupted or need to change tasks quickly. See “Understanding the Patient View" (page 25) A Patient View tab will not open if you open an exam in View mode. It is only created if you open an exam in dictation or view and dictation mode. See “Opening Exams" (page 95).
InteleOrchestrator Menu	Displays links to other InteleOrchestrator modules you may have access to.
Work Area	Displays the contents of your current worklist. If you click on a worklist in the Worklist Column, the exams in that worklist display in this area. See “Worklists and Exams" (page 90) for more information. If you open an exam, the Patient View for that exam displays in this area. See “Understanding the Patient View" (page 25).
Communication Taskbar	Displays links to communicate with your colleagues. Includes messaging, alerts and notifications. See “Collaboration and Communication" (page 126)

About the Worklist Column

The Worklist column appears on the left side of the InteleOrchestrator interface, and contains panels from which you can access your worklists, view exam history, and search for exams.

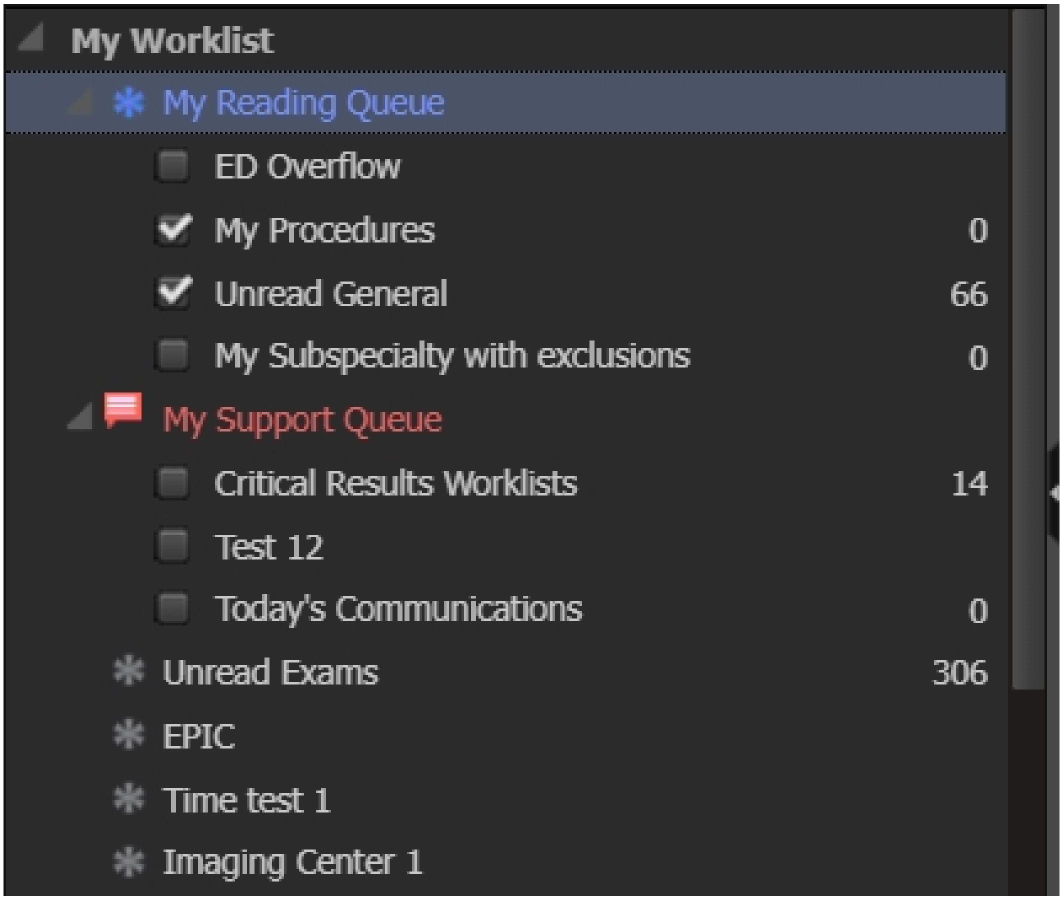


The Worklist Panel

The worklist panel contains all worklists that you have access to view your **My Reading Queue**.

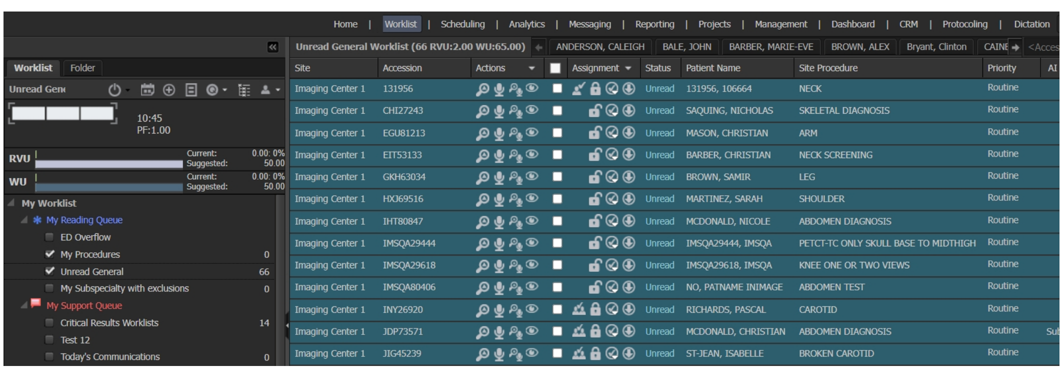
My Reading Queue is considered your “master worklist”. If you are using a shift-based workflow, you will see all worklists associated with a shift under your **My Reading Queue**. These worklists will automatically populate as soon as your shift is selected.

Expand **My Worklist** to locate **My Reading Queue** in the worklist panel.



To view the contents of a worklist:

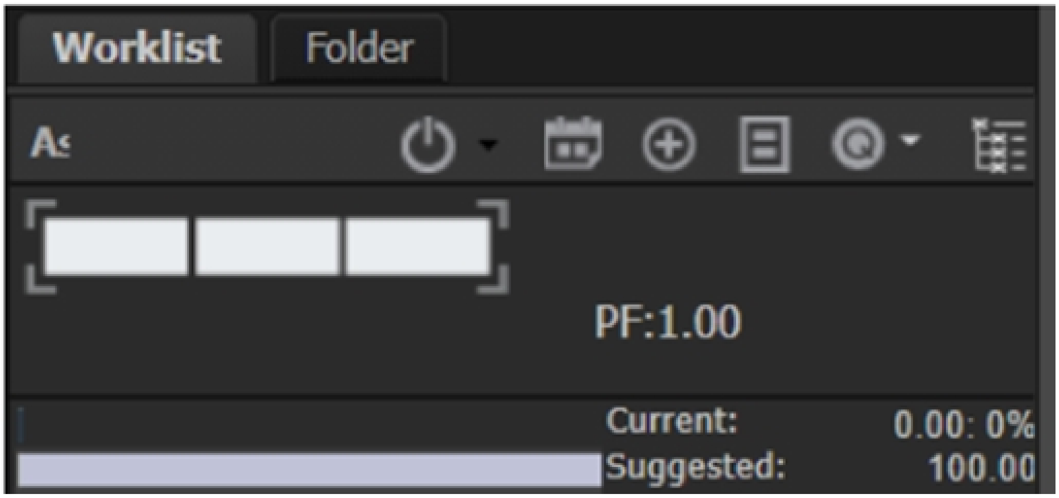
1. Click the icon to expand the queue to display the available worklists.
2. Click a worklist in the worklist section to view the exams it contains in the work area.



Auto-Next Functionality:

Auto-Next is a useful tool when considering Radiologist Workflow. The auto-next feature ensures that every exam in your worklist is read in the predetermined order. This order is established according to how the worklists are set up, i.e., SLA rules, Shift management, subspecialty groups, etc.

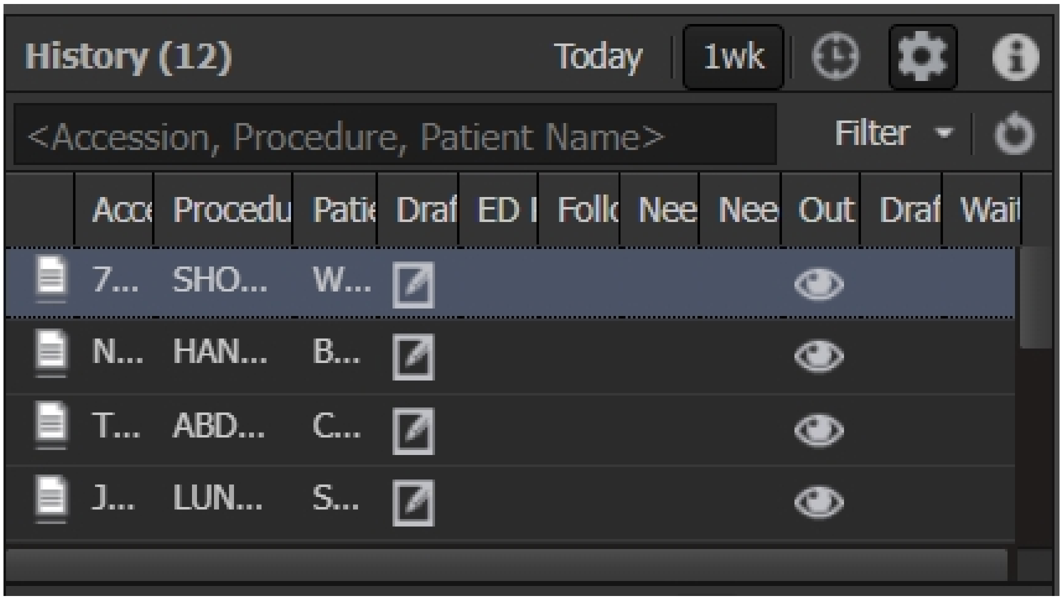
Auto-Next controls are located above the worklists. Click the Auto-Next start icon,  to start the Auto-Next functionality. See “Using Auto-Next” for more information.



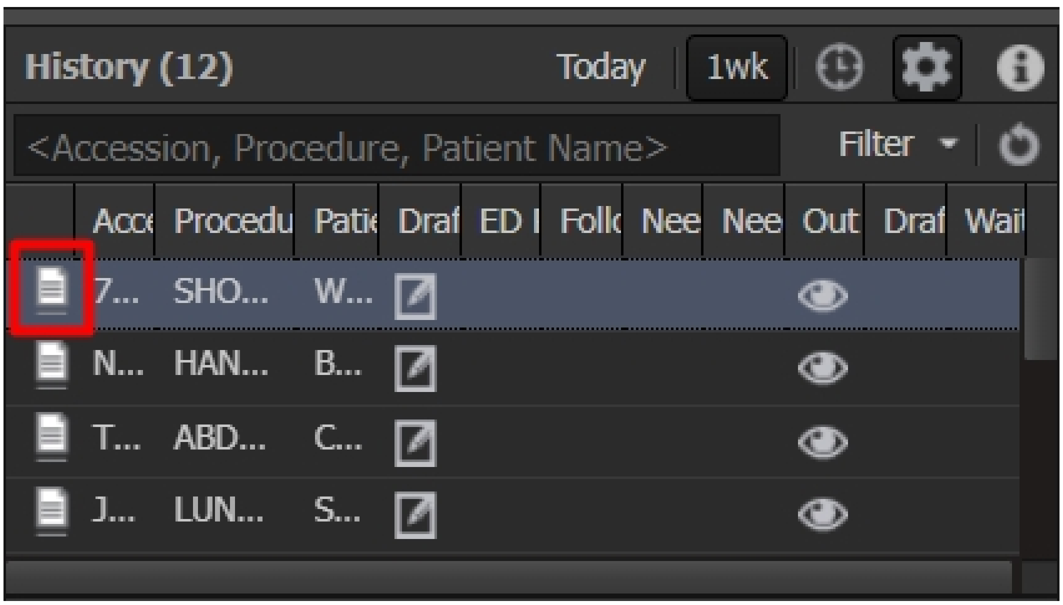
History Panel

The **History** panel contains all the exams that you have dictated or taken action on the specified date range. This includes adding notes or changing exam information. You can search your exam history by selecting **‘Today’**, **‘1wk’** or enter a custom date range by clicking the clock icon. See Searching in Exam History for additional details. To set which actions will appear in this list, see “Setting History Indicators" (page 47). The most common actions include:

- Exams you dictated
- Images you viewed
- Notes you created
- Information about exams you edited

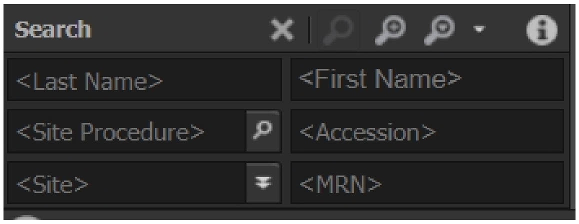


You can hover your mouse over the Report icon to view that patient's report, or you can click an exam to go to that exam's patient view.



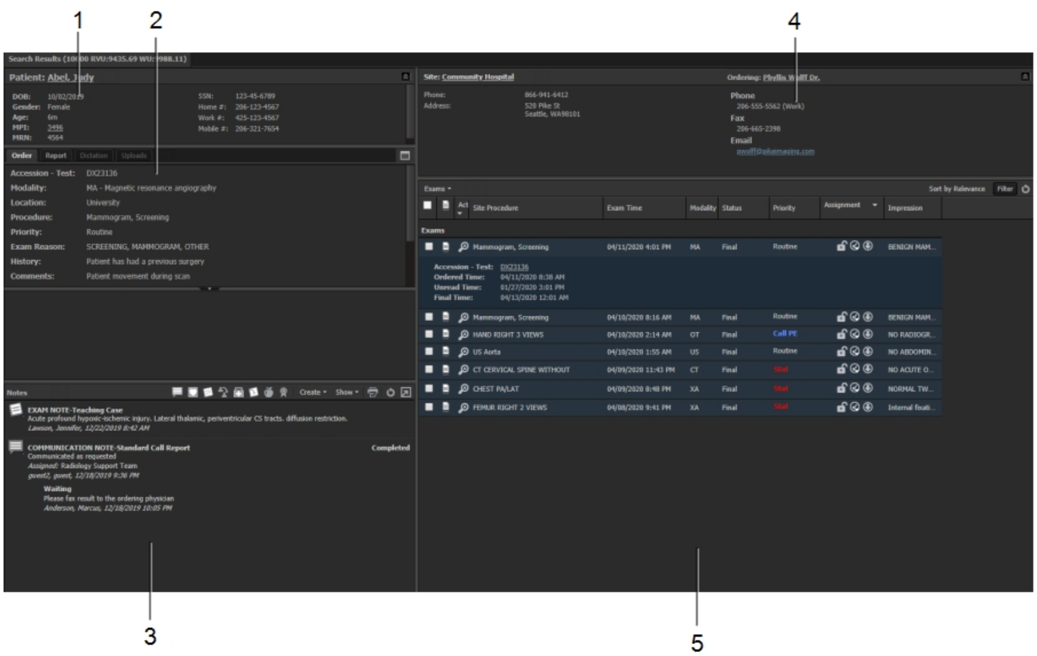
The Search Panel

You can use the Search panel to perform a quick search. The results of your search appear in the work area. See "Quick Search" (page 113) for instructions on how to use this search function.



Understanding the Patient View

The Patient View displays all the patient and exam information in a single view for a specific patient. The Patient View opens when you open an exam to view the exam images, click on an exam in the worklist, or when you double-click an exam for dictation. There are five main sections in the Patient View dialog.



Callout	Section	Description
1	**Patient Information**	Contains patient information, demographics, and contact information. Your InteleOrchestrator system administrator configures the information displayed in this section.
2	**Report Area**	• Displays the order information for exams in the Order tab • Displays the report information in the Report tab if a report has been created for this exam • Displays the dictation area for you to dictate your

Callout	Section	Description
		reports • Displays any uploaded documents
3	**Notes**	Displays all the notes associated with the exam. The notes are sorted with the most recent at the top. You can also create new notes or edit or complete existing notes.
4	**CRM**	The Customer Relationship Management section displays information pertaining to your customer sites and ordering physicians that is captured in the CRM module.
5	**Exam Information**	Lists the patient exams. The exam you opened from the worklist is selected in the exams list. You can view any other exam by clicking it or by hovering your mouse over the Report icon. If you are using InteleOrchestrator Master Patient Index (MPI), you will see all the reports for this patient that reside across multiple facilities. You can also view exam history and edit exam information.

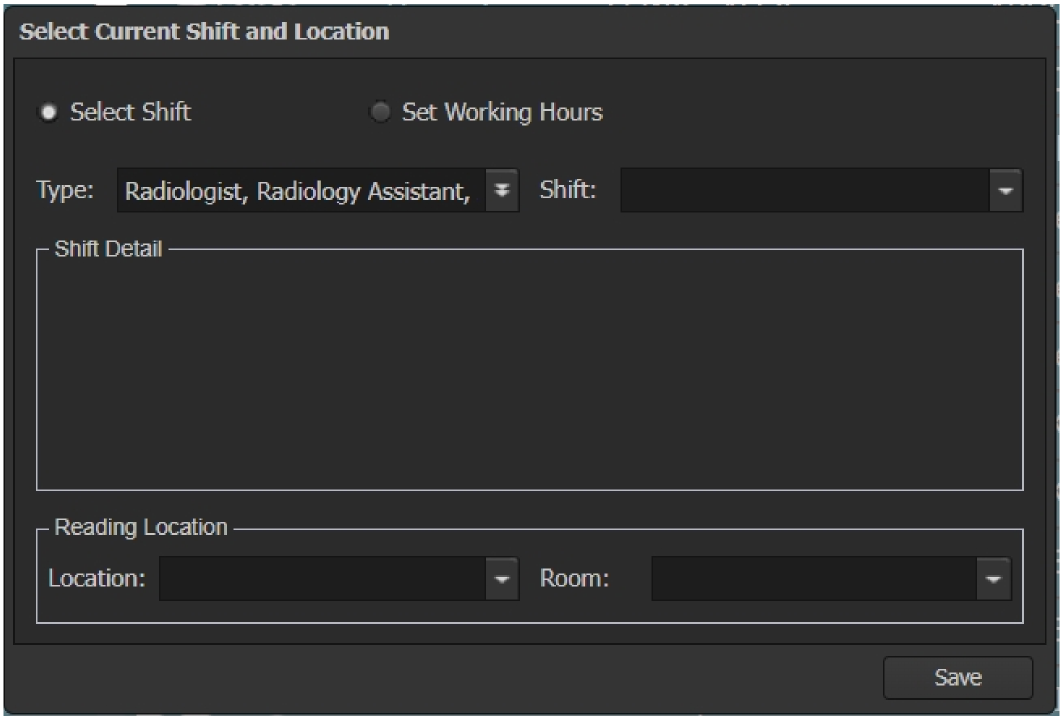
Selecting a Shift or Work Hours

If your practice does not use a scheduling application, such as QGenda or Lightning Bolt, or if your InteleOrchestrator system administrator did not configure shifts for you, you may need to manually select a shift when you log in to InteleOrchestrator. If this is the case, if you do not select a shift, you will have to manually create your own My Reading Queue or work from an individual worklist. See "Managing My Reading Queue" (page 91).

If your practice uses a scheduling application or your InteleOrchestrator system administrator created shifts for your practice, your shift is automatically set when you log in to InteleOrchestrator.

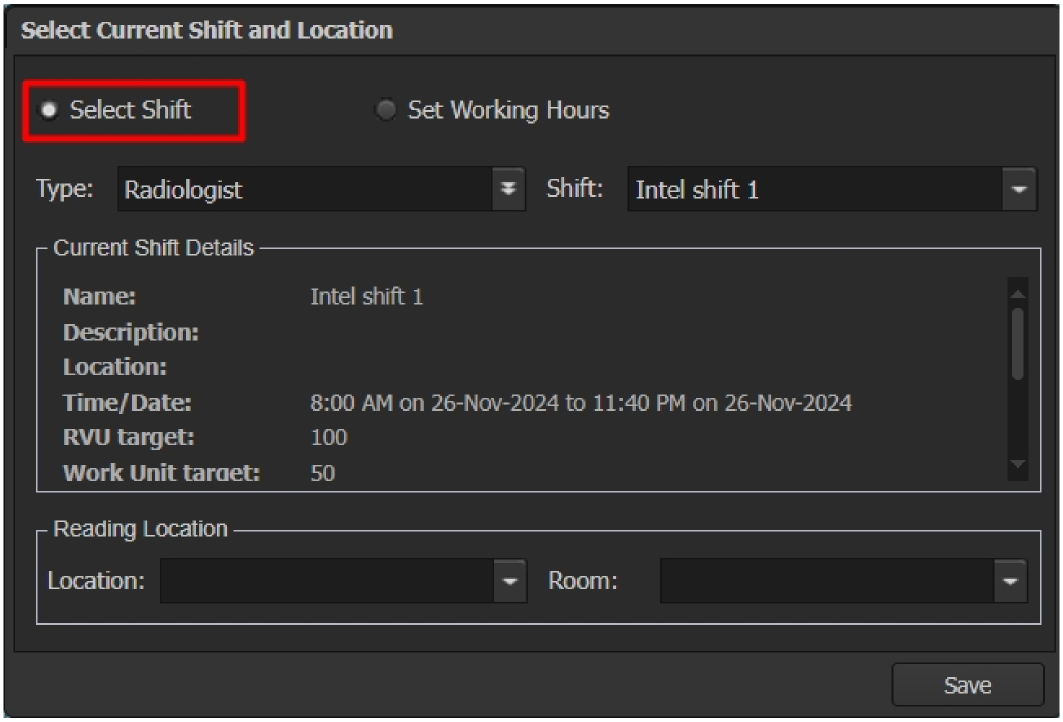
To change your shift:

1. Log in to InteleOrchestrator. See "Logging into InteleOrchestrator" (page 13).
2. In the Select Current Shift dialog, click **Select Shift** or **Set Working Hours**.

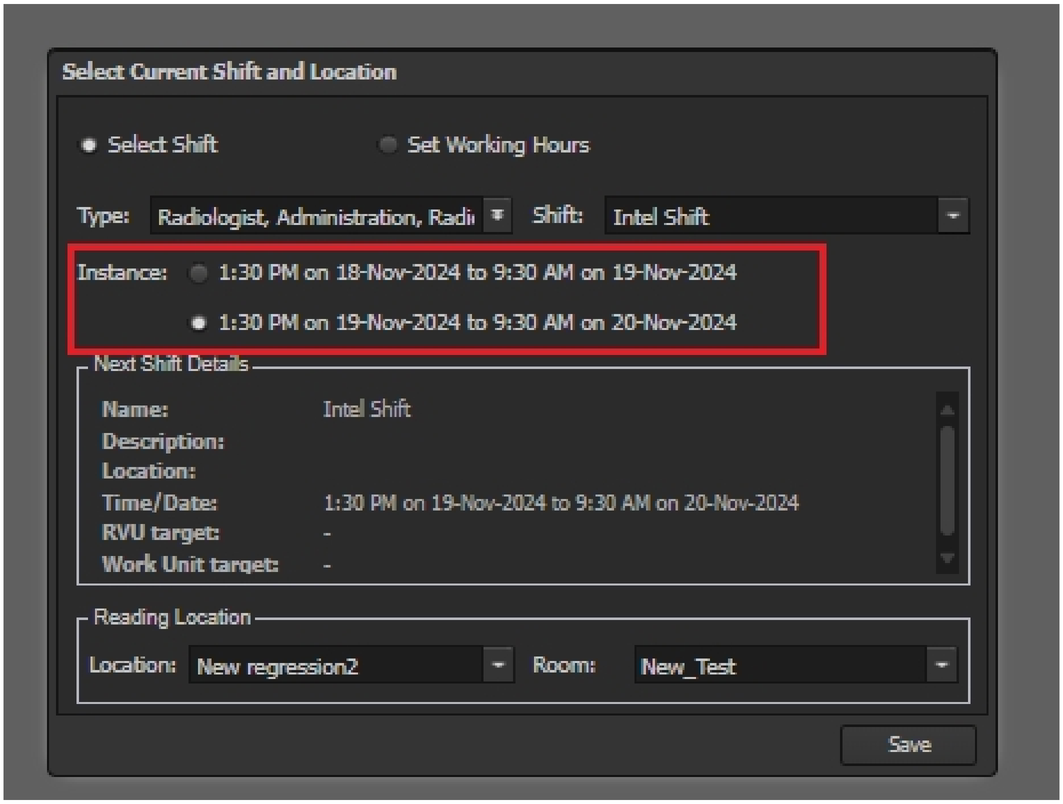


3. Do one of the following:

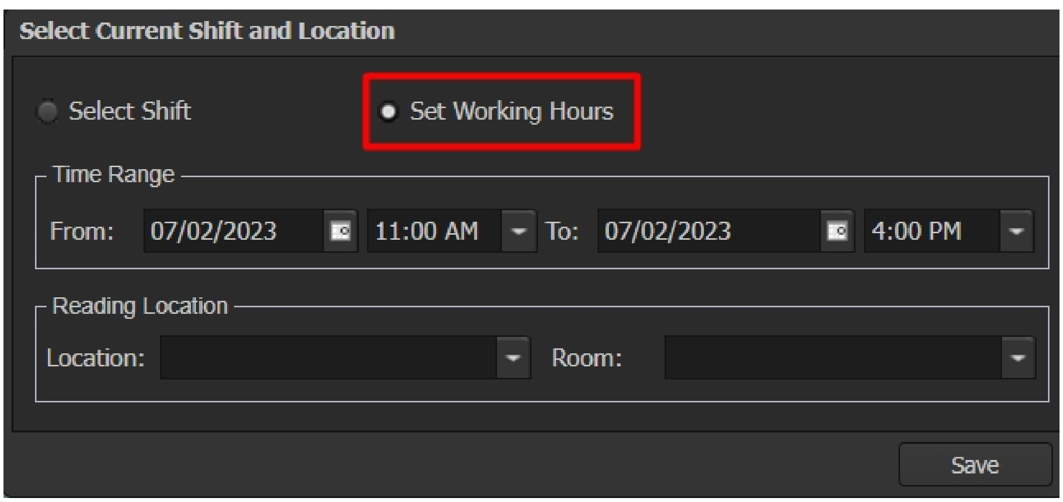
    - To select a shift, select one or more options in the **Type** list, and then select an option from the **Shift** list to set the shift values.



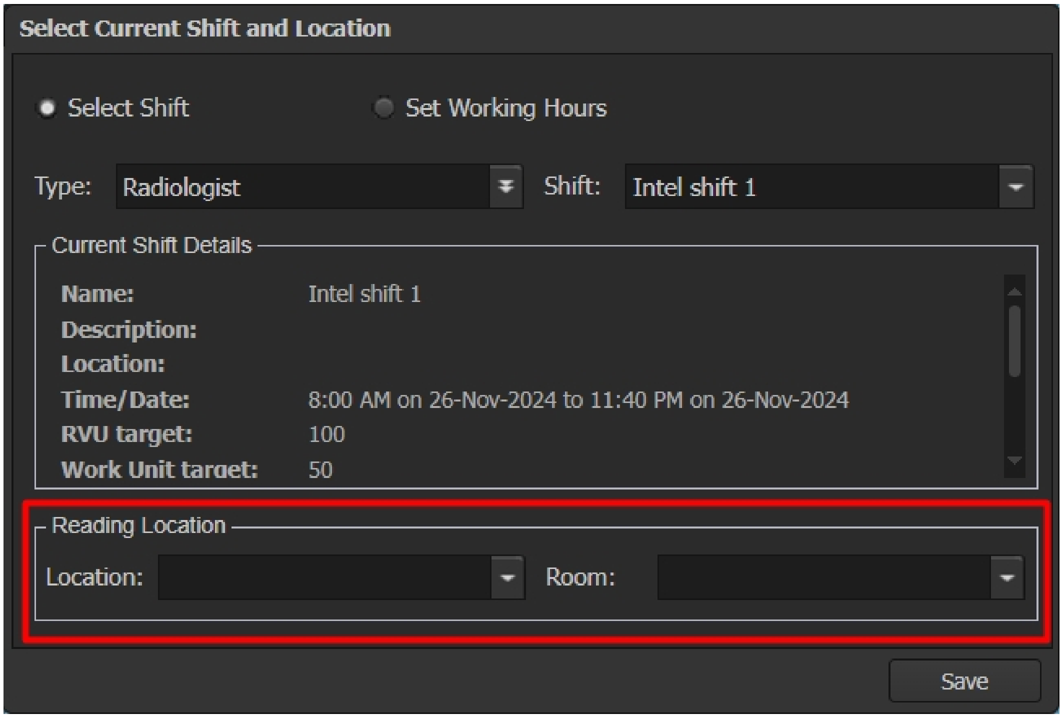
In some cases, there may be multiple instances of the shift that are available for selection. Multiple shift instances will be displayed when this happens. Select one of the instances displayed.



- To set your working hours, in the **From** and **To** fields, enter the date and time range



4. If prompted, select the **Location** and **Room**.

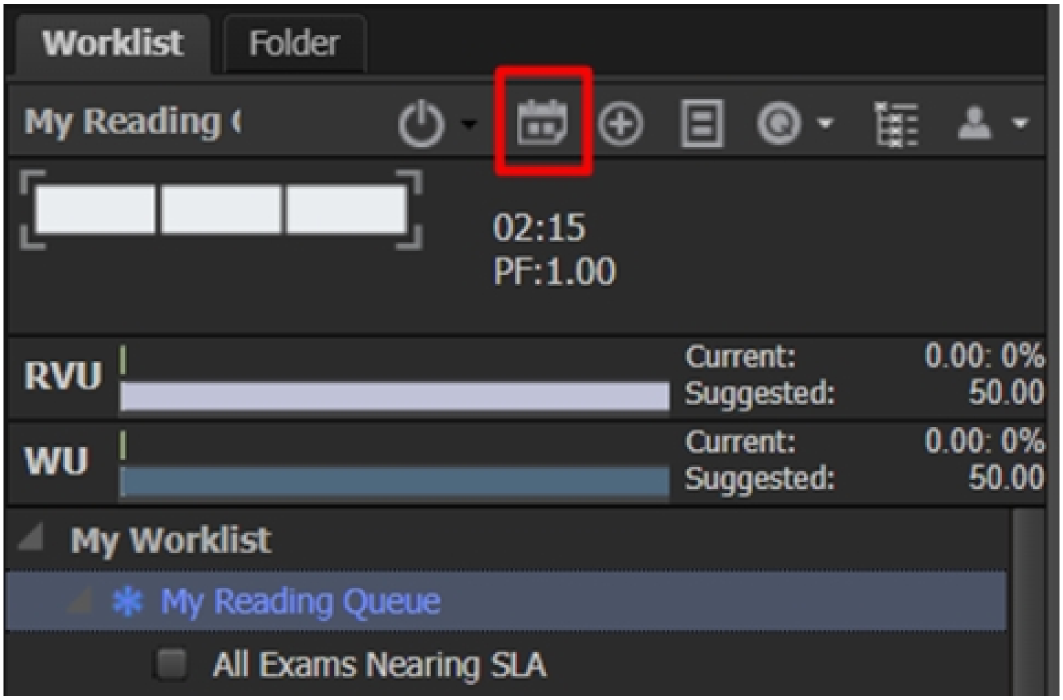


5. Click **Save**.

Your practice may require you to provide certain information on this page, such as Shift, Location, and Room. If any required information is missing, an error message will prompt you to return and provide the necessary details.

Changing Shift or Working Hours

If you need to change your shift after the initial selection at login, you can do this by clicking the “Shift icon” in the top of the worklist panel.



About Extender

The InteleOrchestrator uses the Extender to launch your Viewer and Dictation system. The Extender must be downloaded before these systems can be launched from InteleOrchestrator. You need to do this only once per workstation. After Extender is installed and configured, it will communicate with multiple viewer, dictation, and EHR/EMR client-side or web-based applications to update exams as you read them.

If your practice is using InteleOrchestrator Desktop Monitoring Service, you will not need to install Extender. Ask your InteleOrchestrator system administrator if this step is required.

Installing InteleOrchestrator's Extender Application

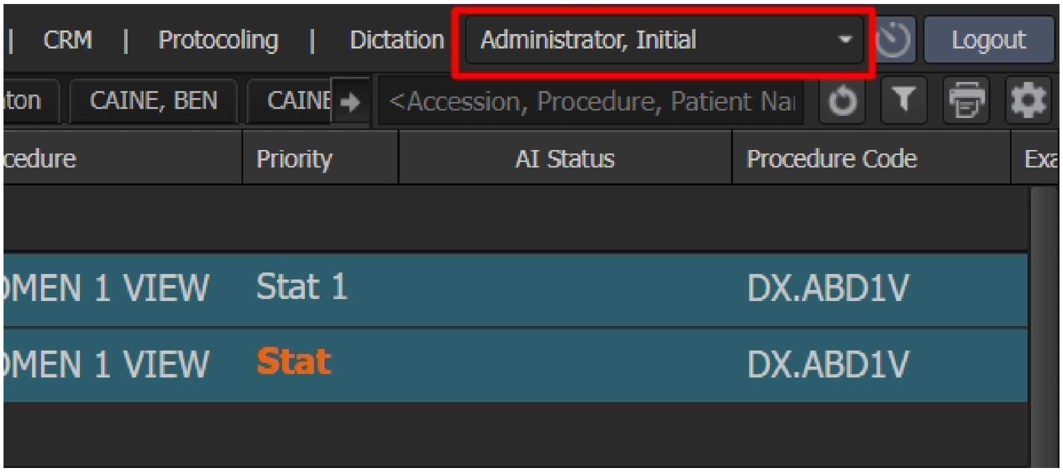
The InteleOrchestrator's Extender application should always be installed.

To install InteleOrchestrator's Extender application:

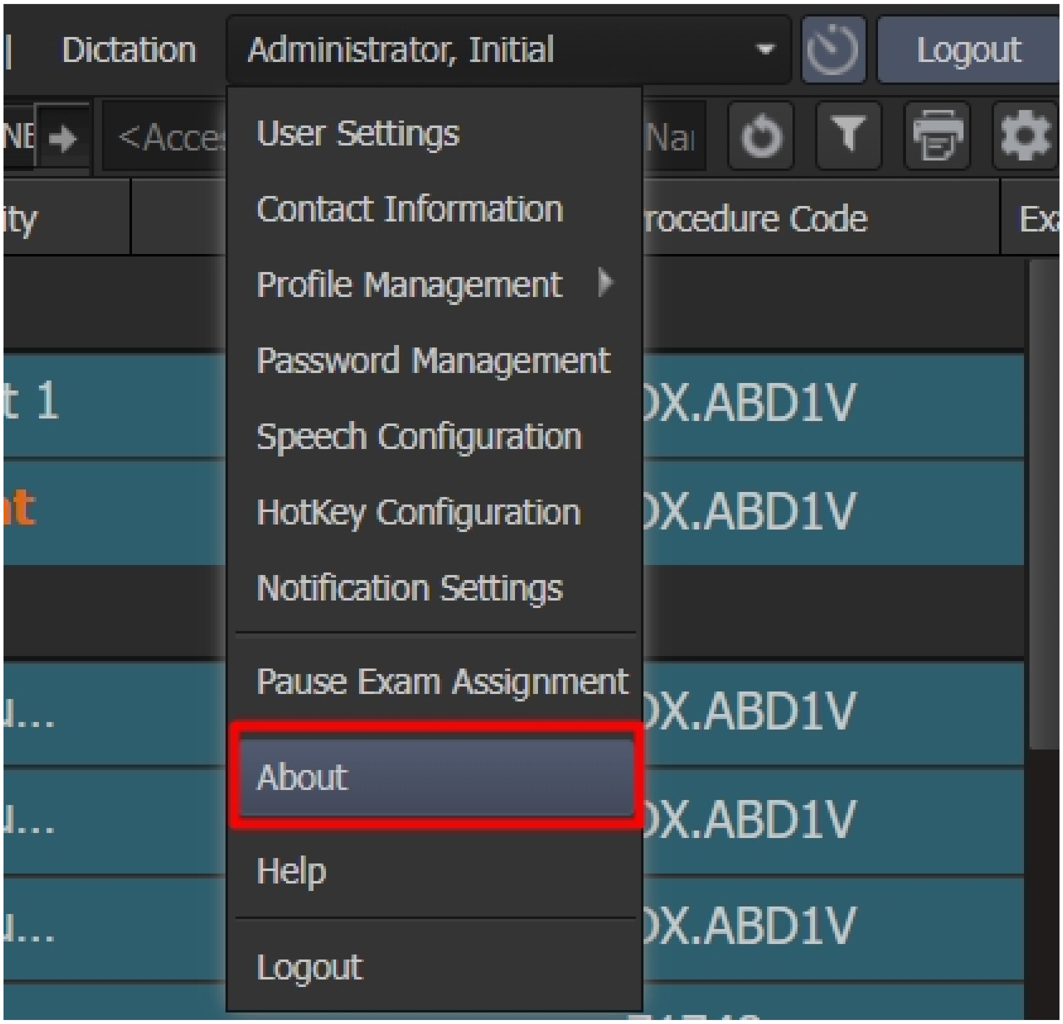
1. Log in to InteleOrchestrator.

   If this is the first time you are logging in to InteleOrchestrator, InteleOrchestrator may prompt you to download the Desktop Installer.

2. Click your user name in the upper-right corner of the InteleOrchestrator interface.



3. Click **About**.



4. The **About** box displays the InteleOrchestrator's Extender application installation choices. Click **Extender Desktop Installer**.

5. Run the InteleOrchestrator's Extender application file.

Once the installation completes and InteleOrchestrator's Extender application is running, the InteleOrchestrator's Extender application icon appears on your workstation taskbar.

Additional Extender Actions

Occasionally, there may be unusual behavior when you are using InteleOrchestrator. To troubleshoot these issues, your InteleOrchestrator system administrator may need access to logs generated by your Extender application. Introduced in version 4.5 R3, log uploading occurs automatically in the background without any action by you. In versions 4.5 R2 and earlier, logs must be manually uploaded.

Here are some Extender actions to take that can make logs available to help your InteleOrchestrator system administrator troubleshoot issues.

Action	Reason	Instructions
Reinitialize	If your InteleOrchestrator system administrator asks you to reinitialize or restart Extender.	1. Right click the Extender icon in your taskbar at the bottom of your screen. 2. Click **Reinitialize**.
View Initialization Logs	File Explorer opens to the location of the initialization log, allowing easy access to logs recorded before the completion of the Extender initialization. This log file contains any relevant errors encountered during this phase, including connection errors and log upload failures.	1. Right click the Extender icon in your taskbar at the bottom of your screen. 2. Click **View Initialization Logs**.
Restart Log	Creates a new log file to help your InteleOrchestrator system administrator and Intelerad Technical Support to troubleshoot issues.	1. Right click the Extender icon in your taskbar at the bottom of your screen. 2. Click **Restart Log**.

Action	Reason	Instructions
Clear the Extender log (Only version 4.5 R2 and earlier)	This will delete the existing Extender logs and restart logging. This action allows your InteleOrchestrator system administrator and Intelerad Technical Support to access the new log files.	1. Right click the Extender icon in your taskbar at the bottom of your screen. 2. Click **Clear Log**.
Upload Log (Only version 4.5 R2 and earlier)	Uploads the logs to InteleOrchestrator to make the logs available to your InteleOrchestrator system administrator.	1. Right click the Extender icon in your taskbar at the bottom of your screen. 2. Click **Upload log**.

Setting Your Status to Away

InteleOrchestrator provides you with the ability to set your status as “Away”. Setting a status as away locks your current InteleOrchestrator session.

When you are ready to resume working, InteleOrchestrator prompts you to select the task that you were performing while away, and credits you with the appropriate RVUs/WUs based on the amount of time you were away and the selected task.

When setting your status to away, you can also choose to:

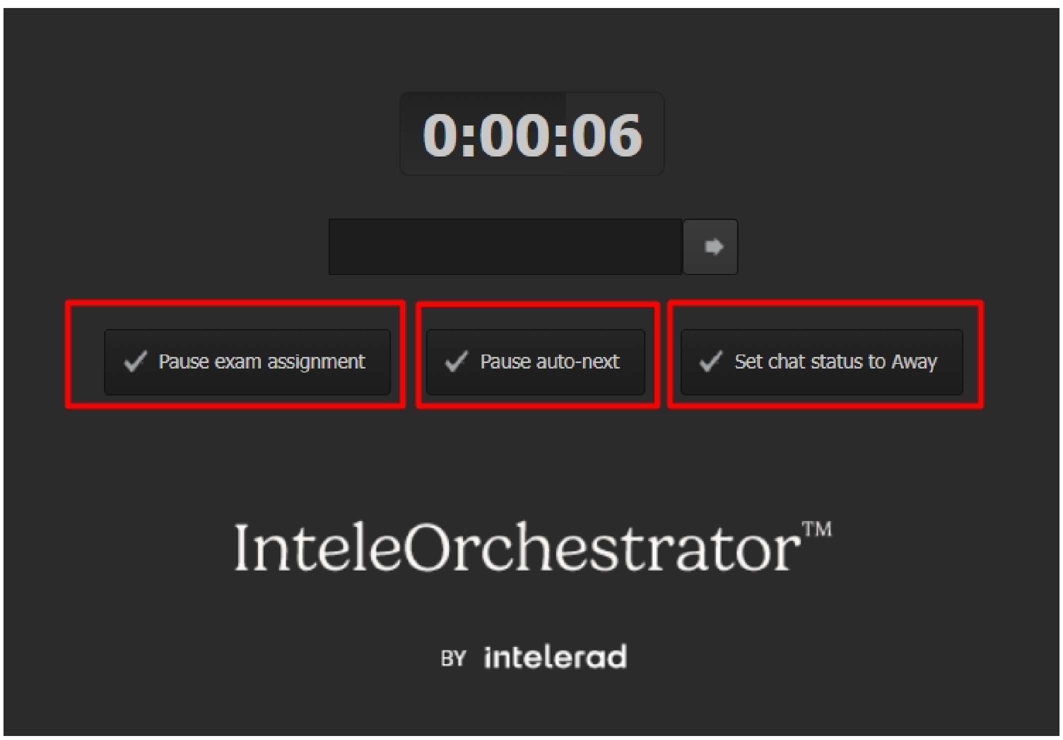
- Suspend exam assignments
- Suspend the Auto-Next functionality
- Set your Messaging status to Away

To activate an away status:

1. Click the **Lock System (Away)** icon (next to **Logout**).
2. In the lock screen, you can choose to apply one or more of the following additional away functions:

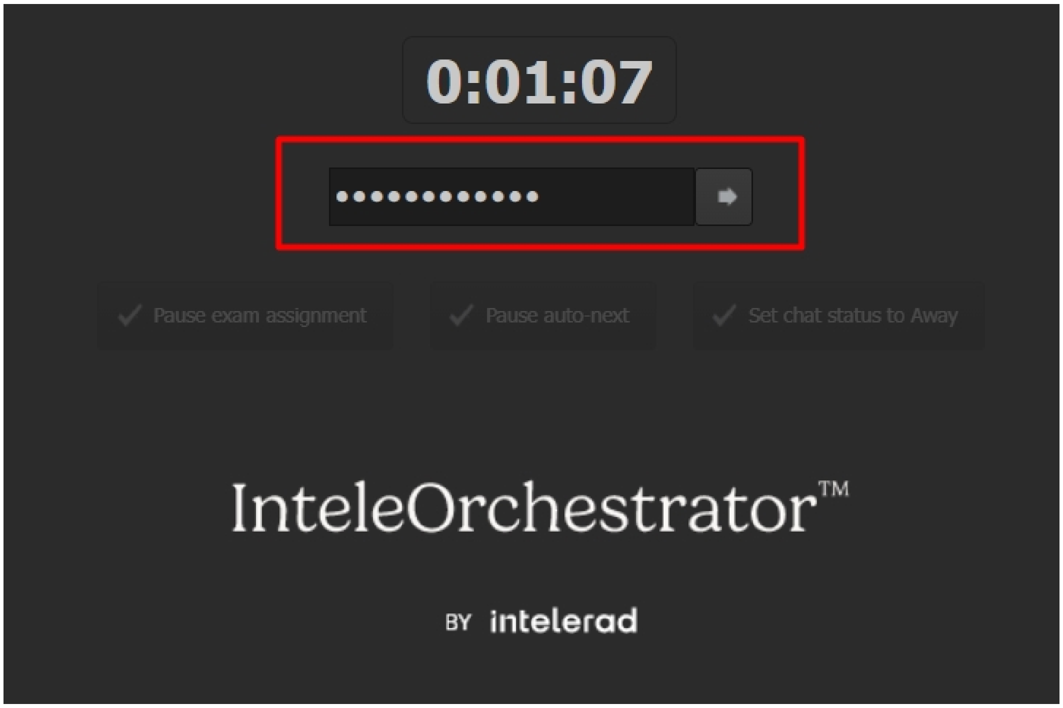
   You have 30 seconds to make your selection before your InteleOrchestrator session locks.

   - **Pause Exam Assignment:** Exams are not automatically assigned to you by the InteleOrchestrator Assignment Engine while you are away. However, Operations users can still manually assign exams to you.
   - **Pause Auto-Next:** The Auto-Next functionality is paused while you are away. See "Using Auto-Next" (page 99) for more details.
   - **Set chat status to Away:** You will appear as "Away" to all other Messenger users. See "About InteleOrchestrator Messaging" for more information.



To resume working after an away status:

1. Enter your password to unlock InteleOrchestrator.

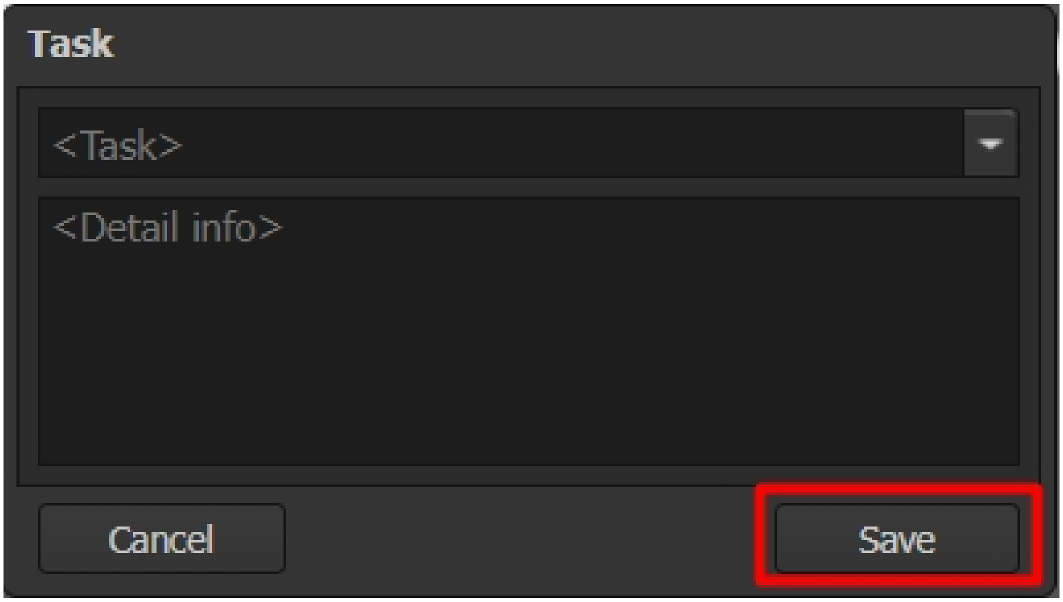


2. From the **Task** list, select the task that you were completing while you were away.

This list of possible tasks is managed by your practice administrators.

3. If required, enter the task details.

4. Click **Save**.



Viewing Your Current Productivity

InteleOrchestrator offers two productivity gauges that you can use to view your current productivity: Productivity Gauge and Workload Gauge.

You can also view the exams for which you received RVU and work units for today.

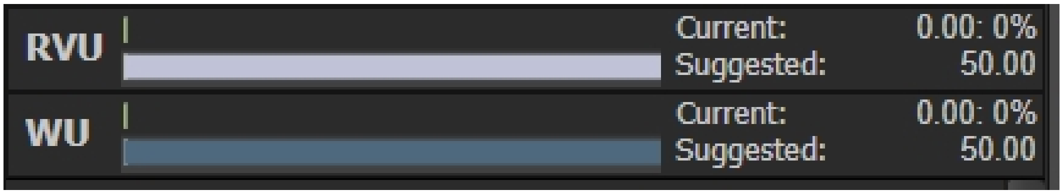
If implemented by your practice, the gauges appear above the worklist menu area in InteleOrchestrator.

To see the exams that you have received RVU credit for today:

- In the Worklist menu, click RVU/WU Credit Detail .

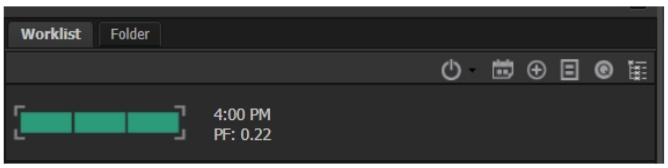
About the Productivity Gauge

The Productivity gauge displays your current productivity for the shift you are working based on an productivity goal that is predetermined by your team. The Productivity gauge consists of two bars. The top bar shows your current productivity followed by the number of RVUs that you have dictated and the percentage in relation to your goal. The bottom bar shows where you should be in relation to your goal for the time of day. This gauge can be configured to show your productivity in RVUs, Work Units, or both. The below image is showing both units.



About the Workload Gauge

The Workload gauge is configured by your practice, and it displays your current productivity in relation to your practice's current workload. The Workload gauge displays in a red/yellow/green format, and your practice may also choose a fourth color, magenta. The color indicates your productivity in relation to your practice's workload.



The practice factor (PF) indicates your practice’s current workload.

PF Value	PF Value Meaning
1	Your practice has the exact amount of work it can handle
>1	Your practice is has more work than it can handle
<1	Your practice has less work than it can handle

Your gauge will also give you insight into your and your practice's workload.

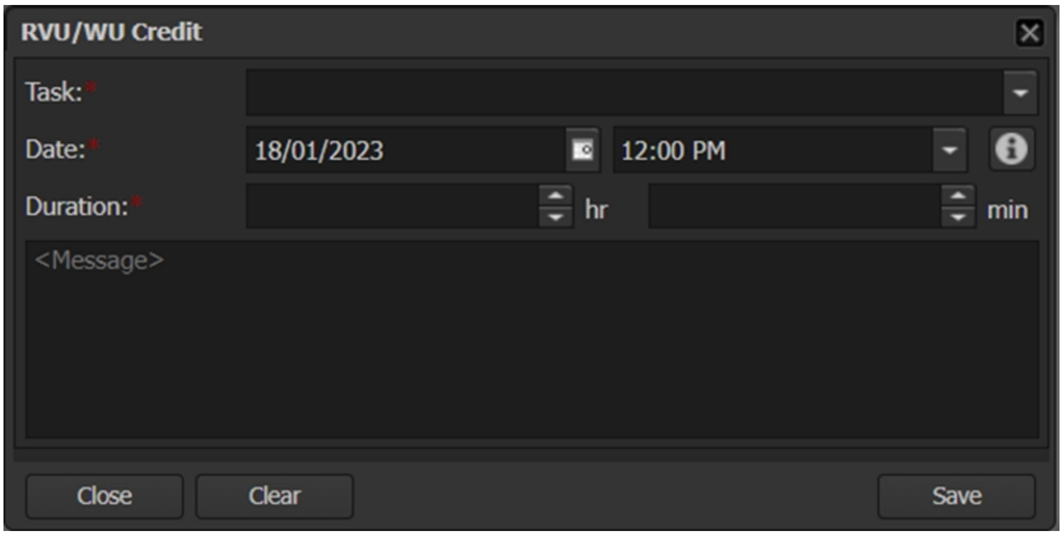
Gauge Color	Meaning
Red	You are behind or your practice is very busy
Yellow	You are slightly behind or your practice is slightly busy
Green	You and your practice are right on target
Magenta	You are reading too fast or your practice is very slow

Entering RVU and WU Credits Manually

Many of the radiologist’s Relative Value Unit (RVU) or Work Unit (WU) credits come from the dictation of exams. However, you may complete non-reading tasks at times, such as a tumor board meeting. If your InteleOrchestrator system administrator has given you permission, you must manually enter RVU or WU credits for these tasks.

To manually enter RVU or WU credits:

1. At the top of the Worklist column, click the **Enter RVU/WU Credits** icon.
2. In the RVU/WU Credits dialog, select the type of task you performed from the **Task** drop-down list.
3. In the **Duration** field, enter the amount of time you spent on that task.
4. If required, change the **Date** field to reflect when you performed the task.
5. If required, enter a comment in the **Message** field.
6. Click **Save**.

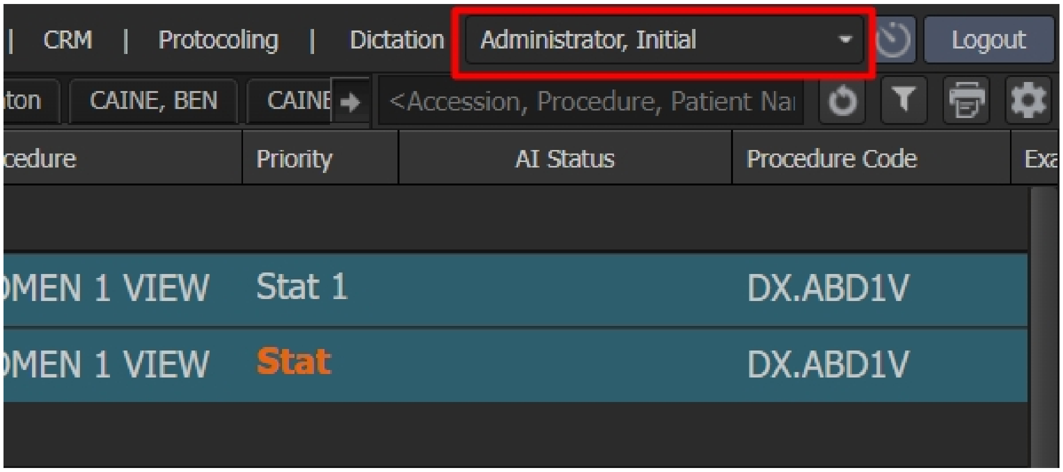


Managing Your User Names and Passwords

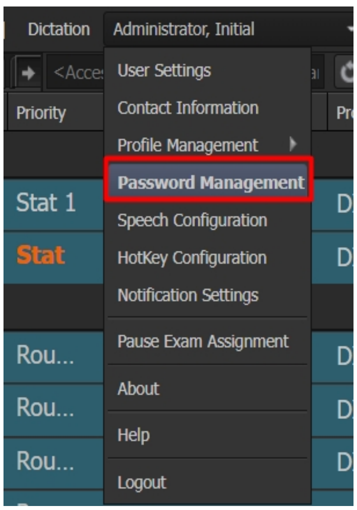
Your group may manage all member passwords via LDAP. If not, you can use these instructions to change your password in InteleOrchestrator. If you launch an image viewer or a dictation engine that is not synchronized through LDAP, you also enter your user name and password for those systems here to log into them.

To specify your user name and new password:

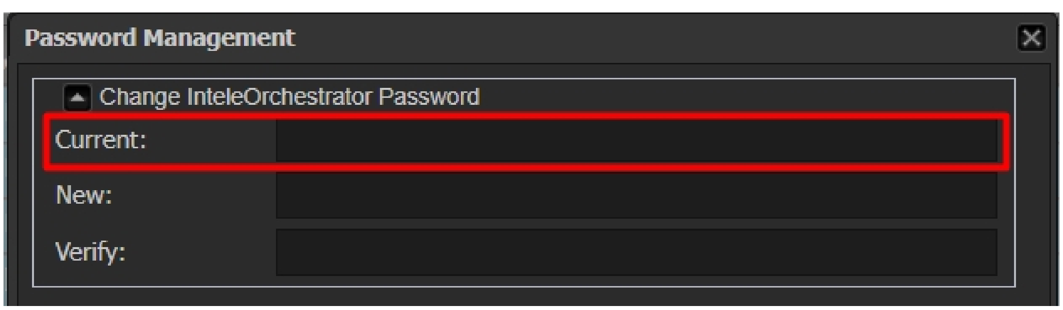
1. Log in to InteleOrchestrator. See “Logging into InteleOrchestrator" (page 13).
2. Click your user name in the upper-right corner of the interface.



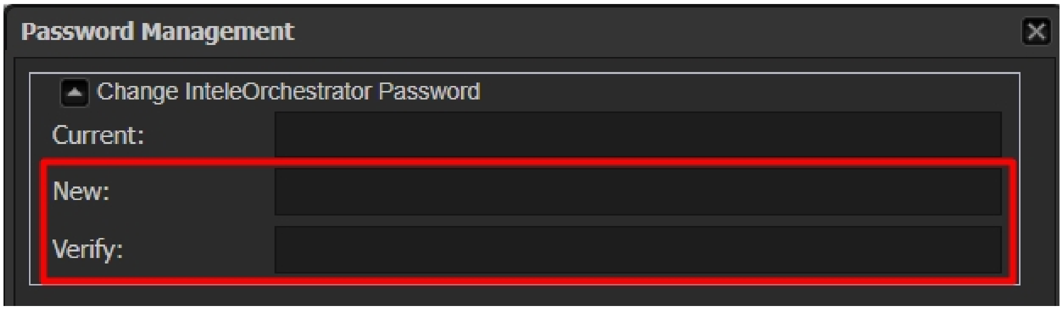
3. Click **Password Management**.



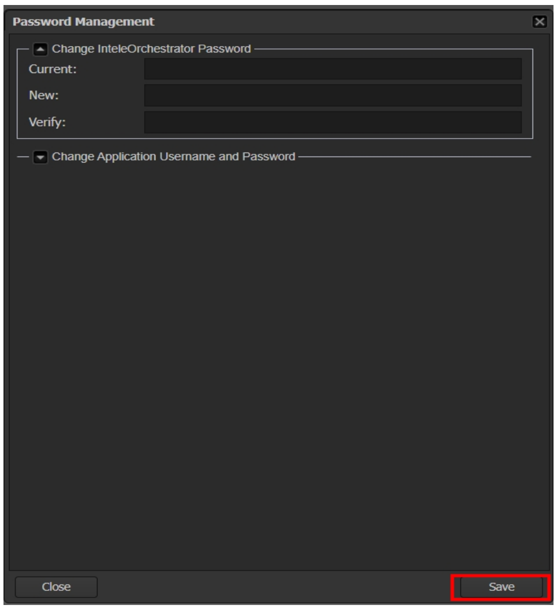
4. In the Password Management dialog, enter your current password in the **Current** field.



5. Enter your new password in the **New** and **Verify** fields.


Password Management
Change InteleOrchestrator Password
Current:
New:
Verify:

6. Click **Save**.


Password Management
Change InteleOrchestrator Password
Current:
New:
Verify:
Change Application Username and Password
Close
Save

2

APPLICATION SETTINGS AND USER PREFERENCES

While most application preferences and settings are set by your InteleOrchestrator system administrator, there are settings that you can change to customize the appearance of the application, ensure that other users can communicate with you, and control how the application notifies you of certain events.

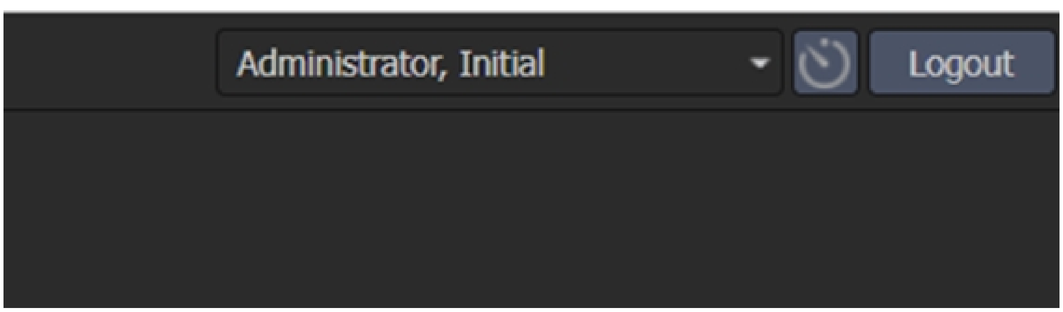
In this chapter:

Viewing Your User Settings

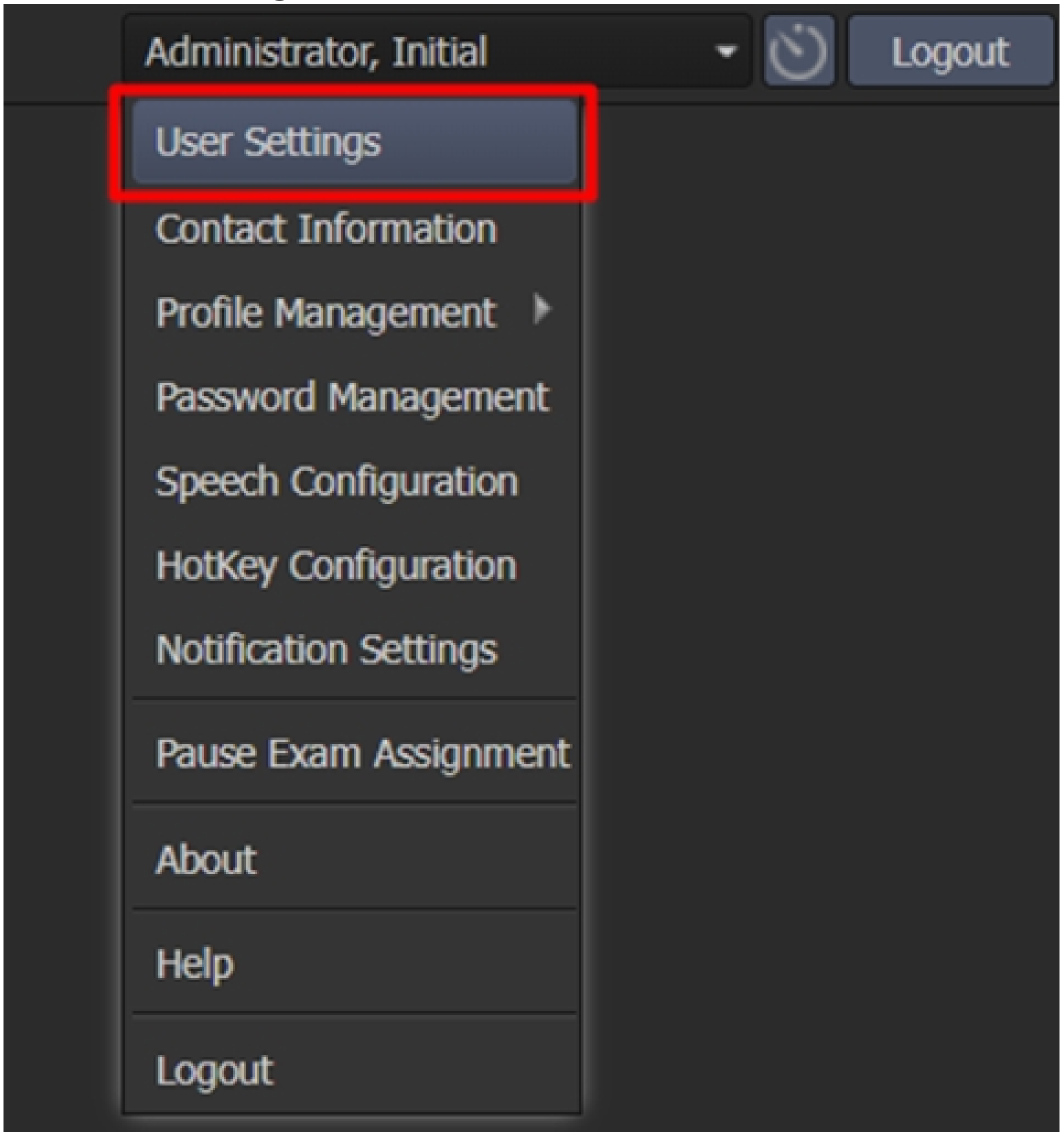
You can view all user settings currently assigned to you, such as what groups you belong to, your subspecialties, your practices, and your roles. View your settings to confirm they are correct. If not, contact your InteleOrchestrator system administrator to modify these settings.

To view your user settings:

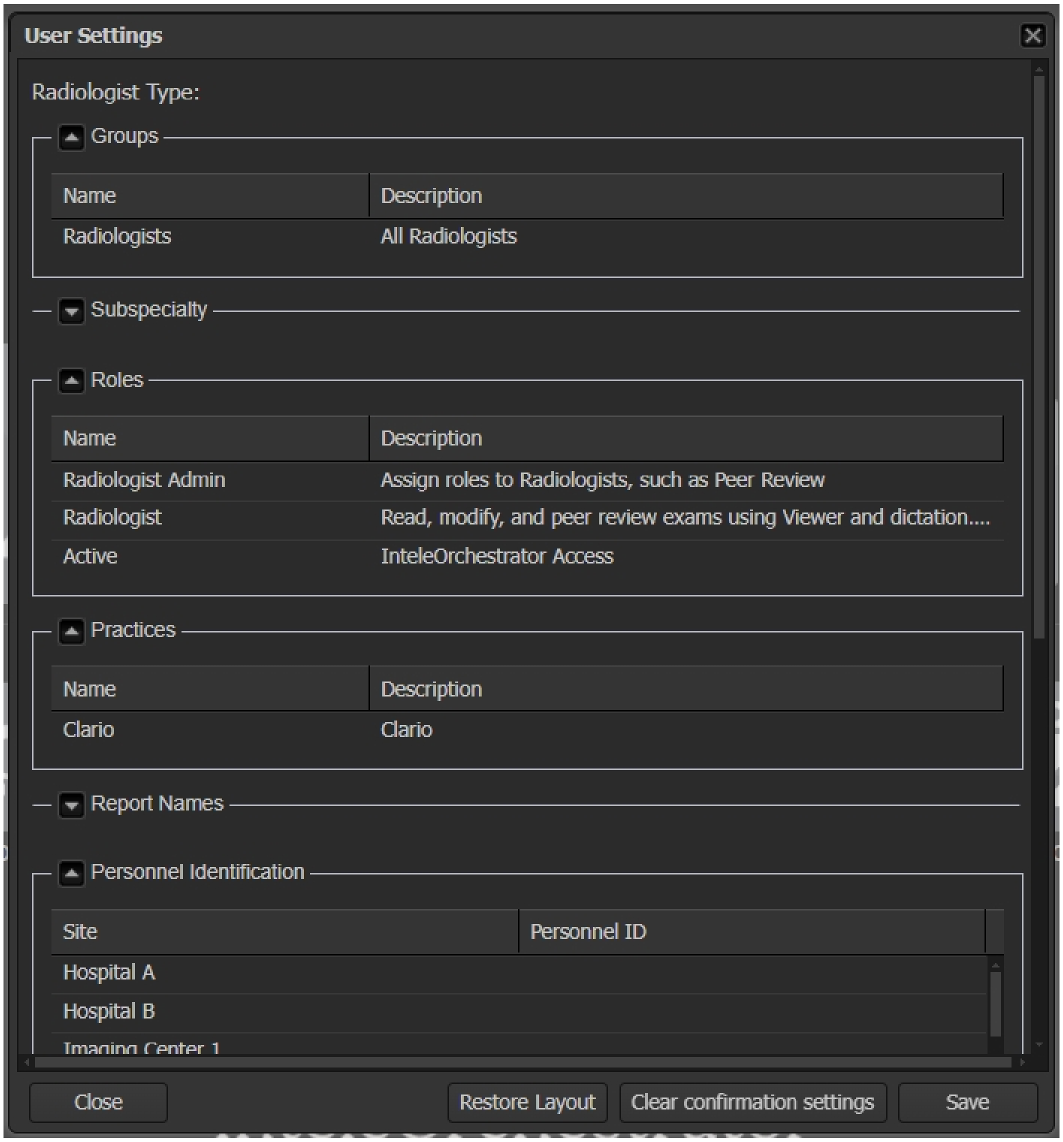
1. Click your username in the upper-right corner of the InteleOrchestrator interface.



2. Click **User Settings**.



3. User settings are displayed.



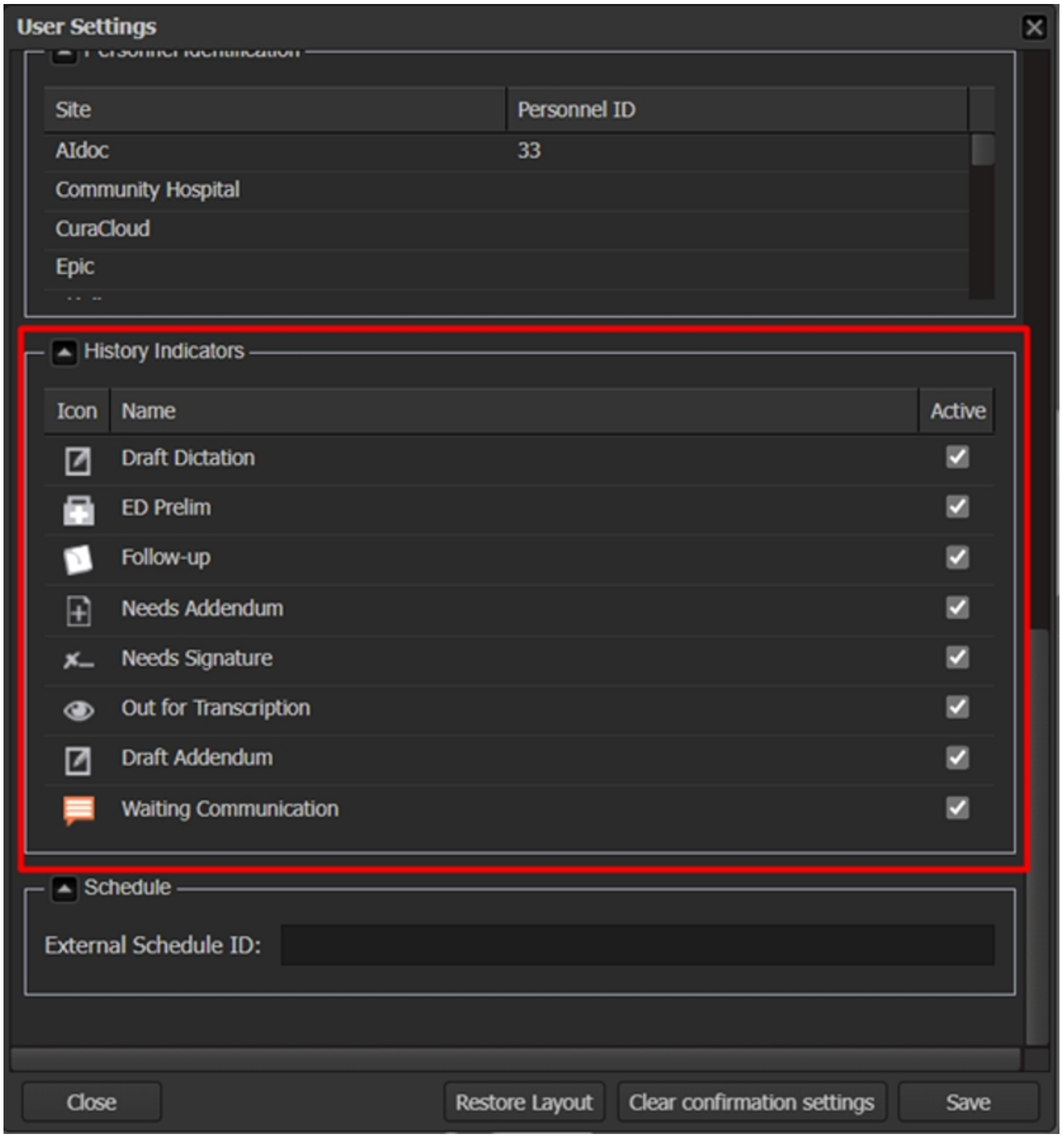
Setting History Indicators

You can view, add, or remove the history indicator icons that appear in the History section of the Worklist tab. See About the Worklist Column for more details. The icons you make active will appear next to relevant exams and alert you to actions needed for an exam or an exam's status.

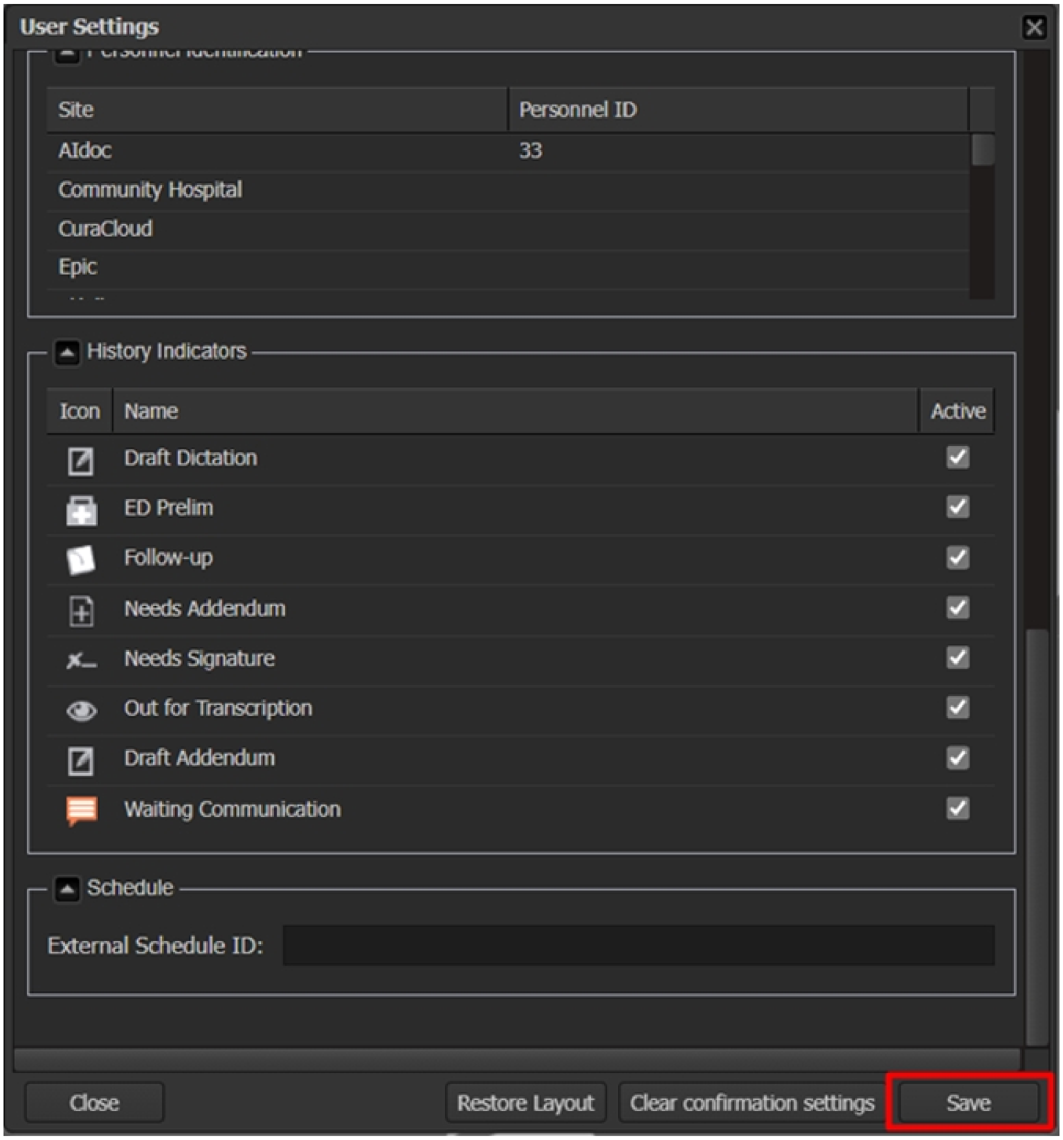
To select history indicators:

1. Click your username in the upper-right corner of the InteleOrchestrator interface.
2. Click **User Settings**.

3. Under the History Indicators, add or remove history indicators as required. To add a History Indicators icon, click a blank space in the desired History Indicators icon row under the Active column. To remove a History Indicators icon, click the checkmark in the History Indicators icon row under the Active column so that the checkmark no longer appears.



4. Click **Save**.



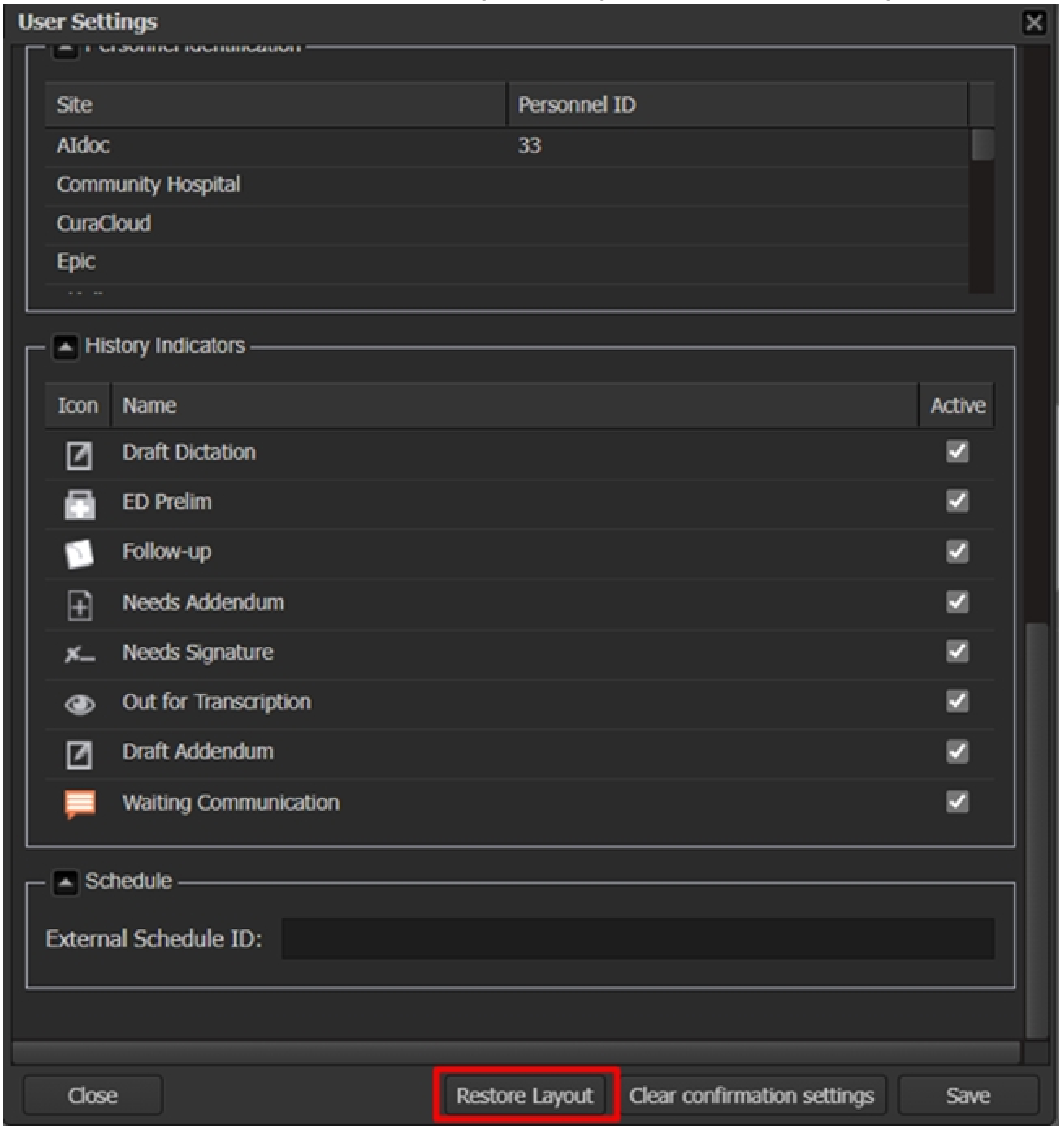
Restoring Your User Settings Layout

If you make changes to your User Settings, you can reset those values to their original value. For example, if you changed the worklist layout, such as column width and order, and panel sizing, you could restore them to the default state. Additionally, if you clicked a

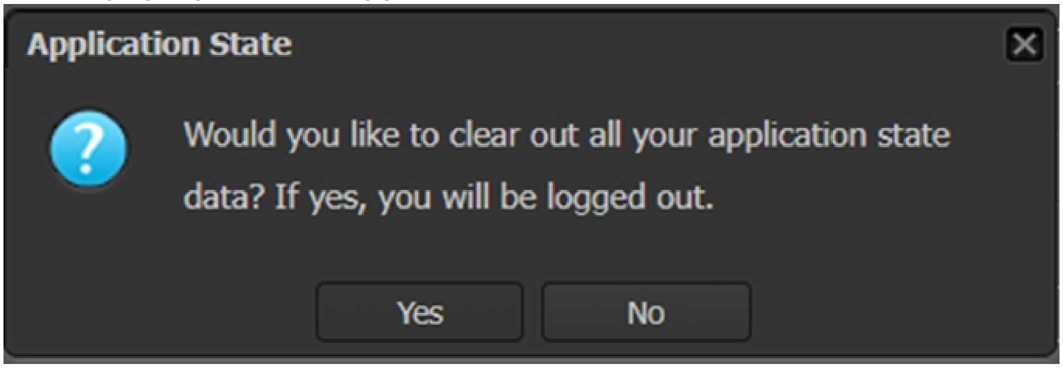
"Never show me this again" response to a notification but need to see them after all, you can reinstate any pop-up settings that you selected to never show.

To restore your worklist layout:

1. Click your username in the upper-right corner of the InteleOrchestrator interface.
2. Click **User Settings**.
3. At the bottom of the User Settings dialog, click **Restore Layout**.



4. A new pop-up window appears.

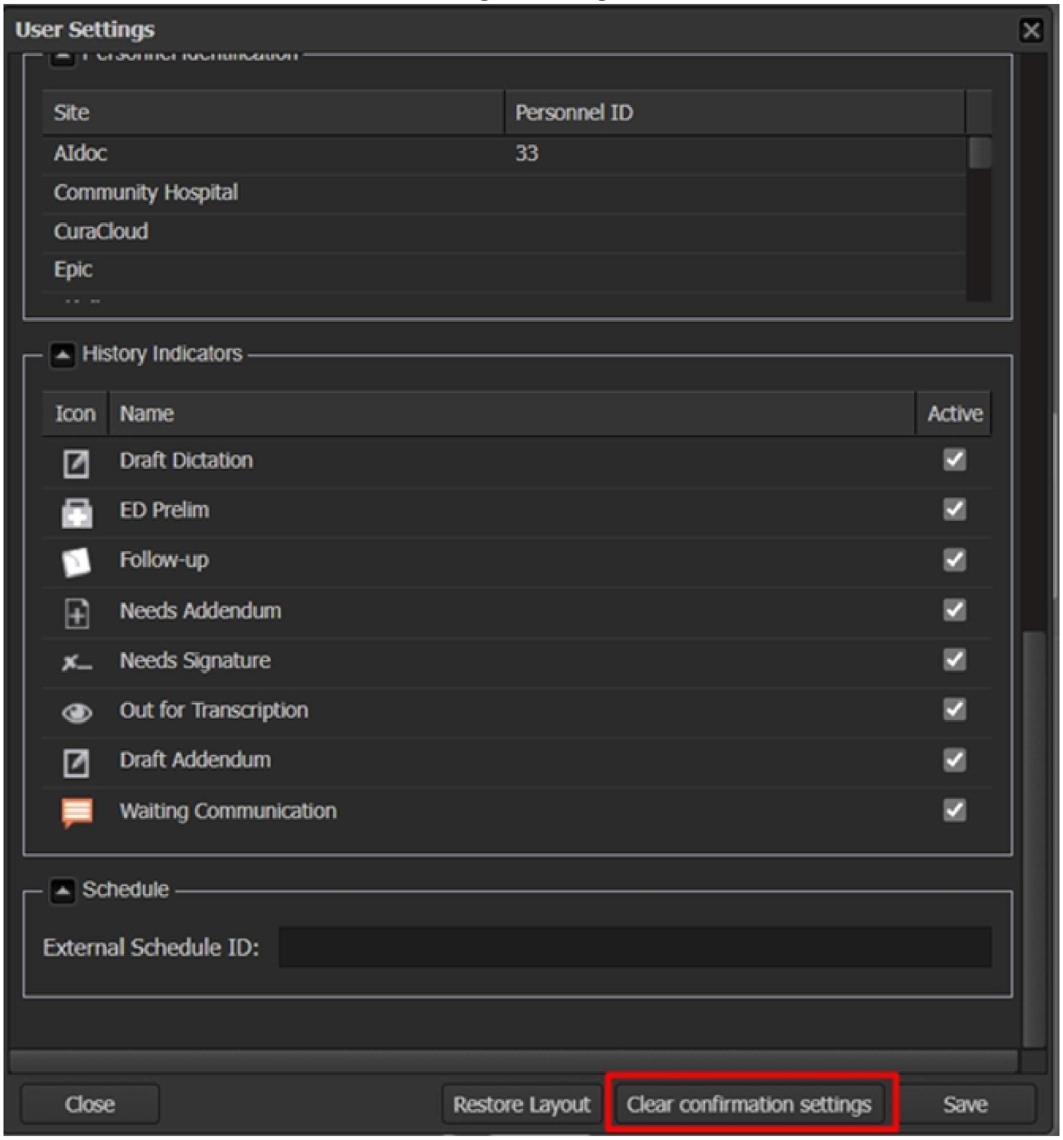


5. Click **Yes** to clear out all your application data to restore layout or Click **No** to cancel.

To receive notifications again:

1. Click your user name in the upper-right corner of the InteleOrchestrator interface.
2. Click **User Settings**.

3. At the bottom of the User Settings dialog, click **Clear Confirmation Settings**.



4. The user settings are cleared. Click Close to close the User Settings dialog box.

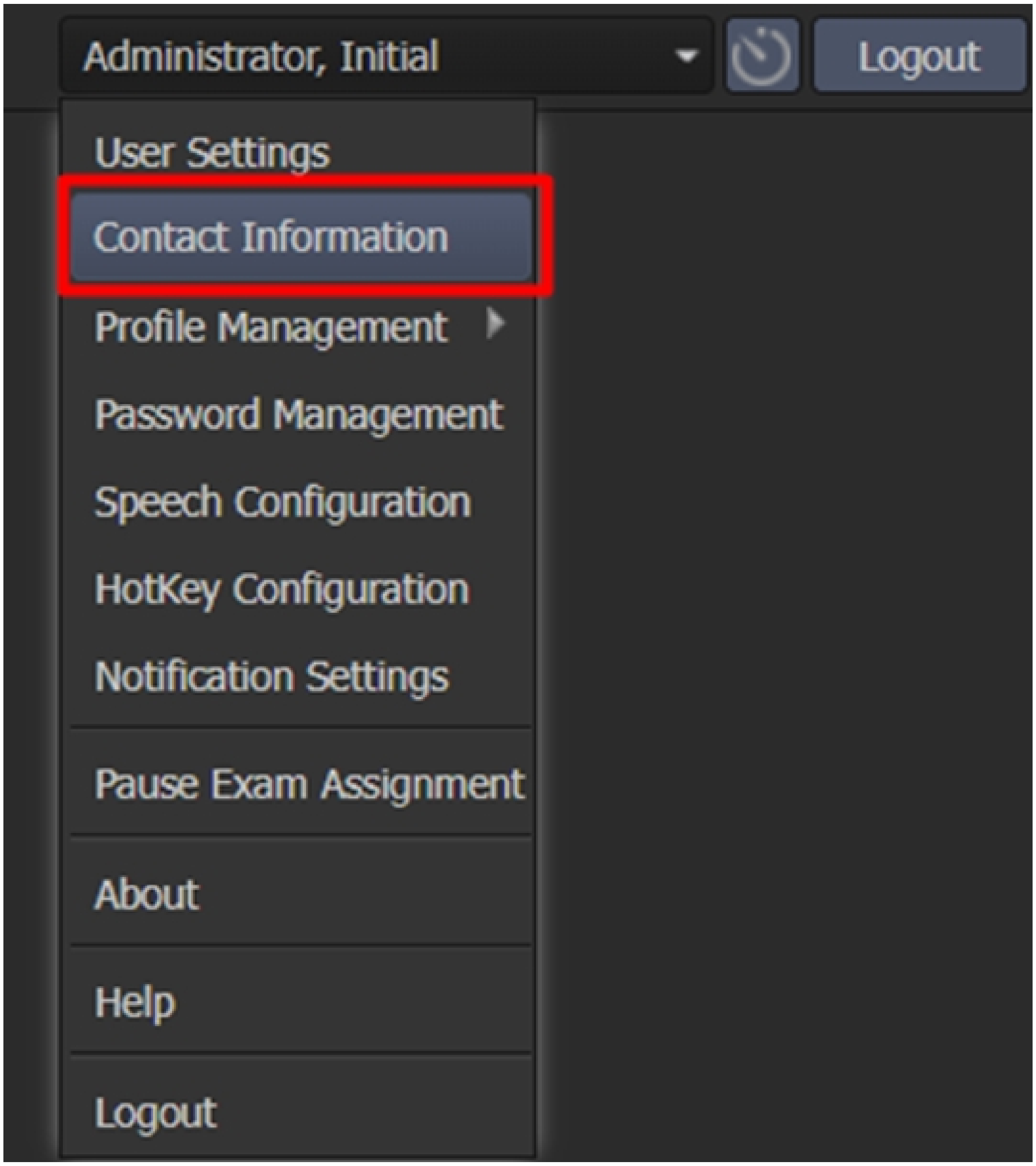
If you click the Close button the User settings dialog box will be closed without saving the changes.

Adding Your Contact Information

For Messaging and Email notification functions to work, you must add your contact information in InteleOrchestrator.

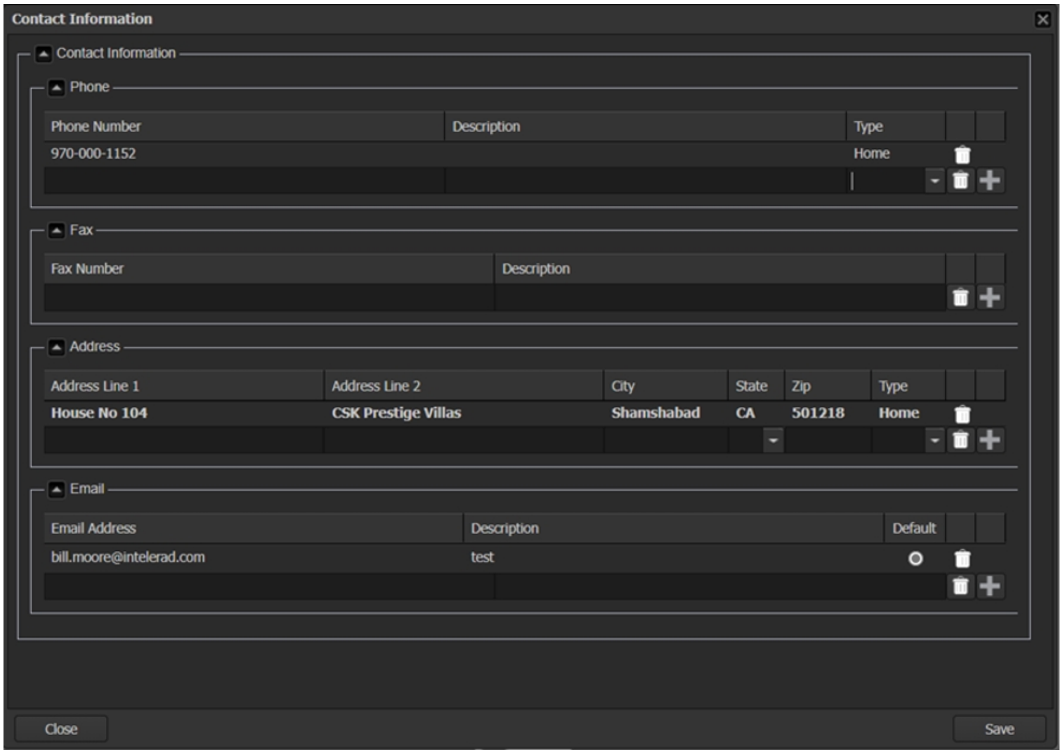
To add your contact information:

1. Click your username in the upper-right corner of the InteleOrchestrator interface.
2. Click **Contact Information**.



3. Enter your contact information in the corresponding fields. Any information you add will appear in the Messaging application.

To add multiple entries for a category, click **+**. To delete contact information, select the row you want to delete and click icon.



4. Click **Save**.

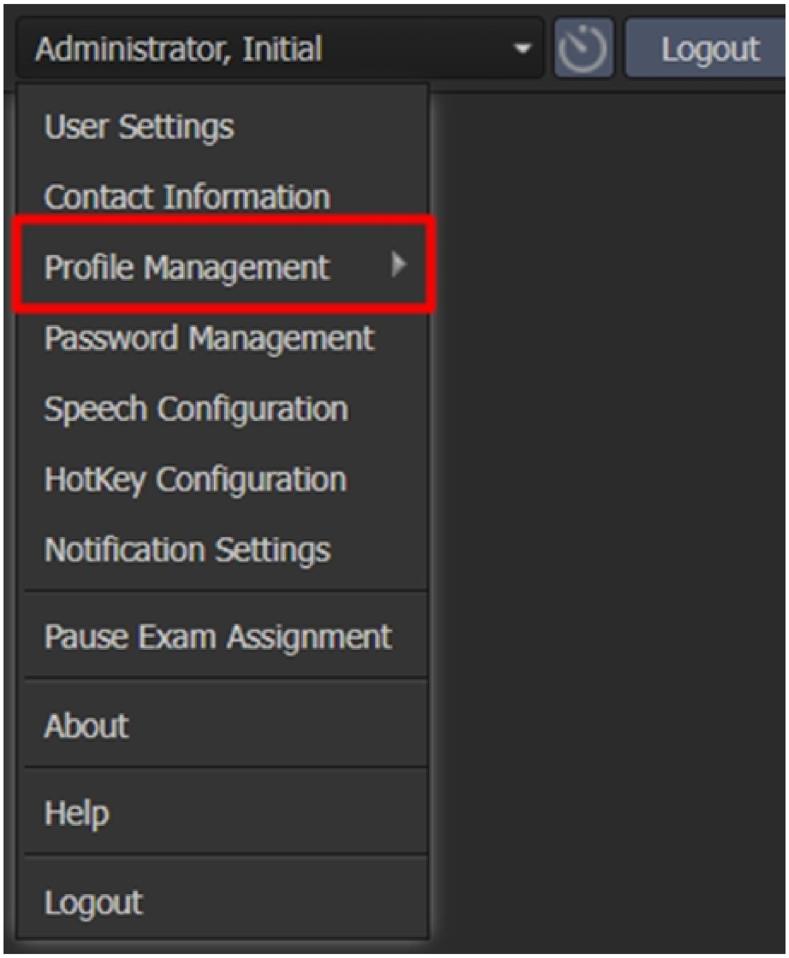
Profile Settings

You may have multiple profiles associated with your InteleOrchestrator user account. Different profiles allow you to apply different settings based on the location you are working at or the role you are working in that day. This can be useful for situations such as working in different locations that use a different computer or workstation setups. If you have multiple profiles, you can then select the profile that best fits your work needs for that location or workflow for the exams you are reading.

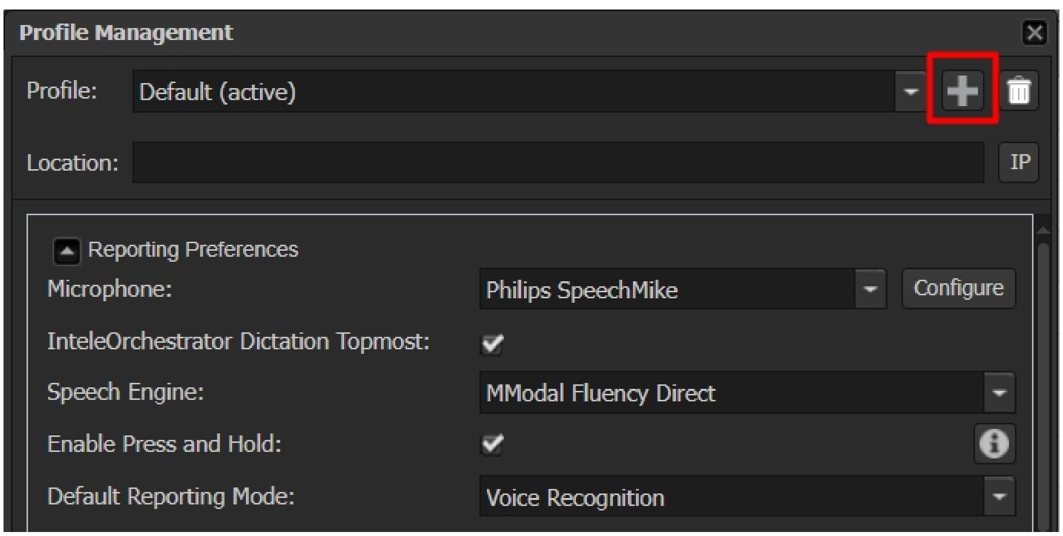
Creating a Profile

To create a profile:

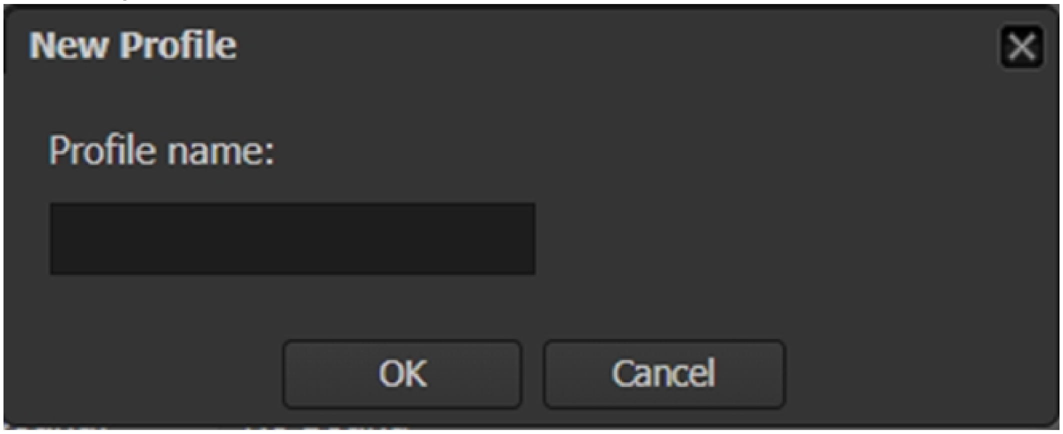
1. Click your user name in the upper-right corner of the InteleOrchestrator interface.
2. Click **Profile Management**.



3. Click Add next to the Profile field.



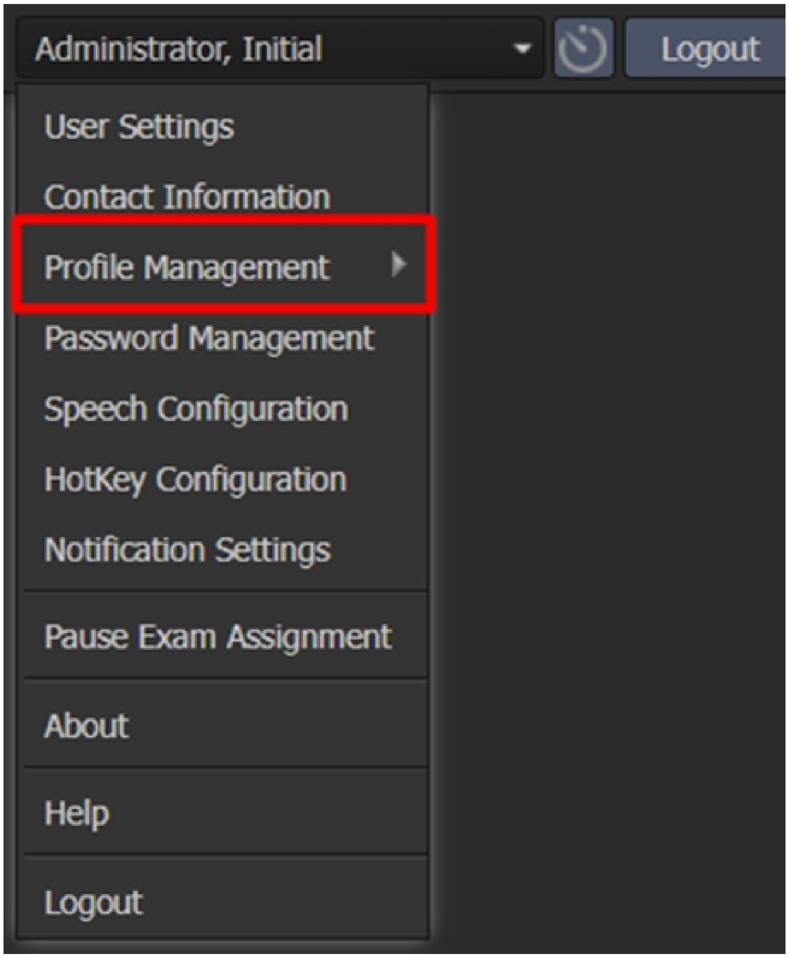
4. Enter a profile name.



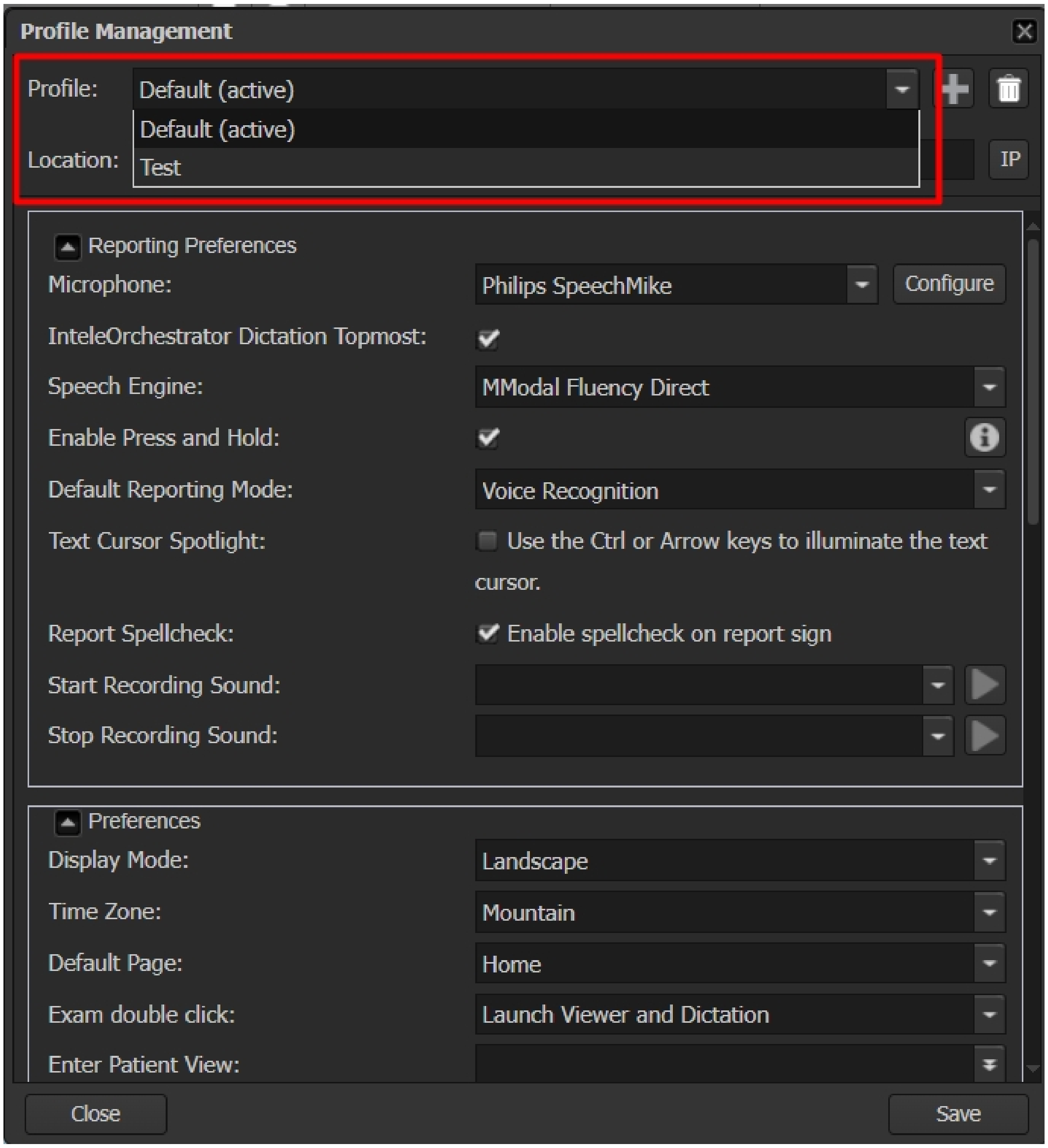
5. Click **OK**.
6. Set the profile settings as needed.
7. Click **Save**. Your new profile now appears in the profile list.

To edit an existing profile:

1. Click your username in the upper-right corner of the InteleOrchestrator interface.
2. Click **Profile Management.**



3. Click the drop-down button from the **Profile** field.



4. Select the desired profile from the list of profile names displayed.
5. Make the desired changes to the selected profile.
6. Click Save.

To change to a different profile:

1. Click your username in the upper-right corner of the InteleOrchestrator interface.
2. Click **Profile Management**. The different profiles will be displayed.

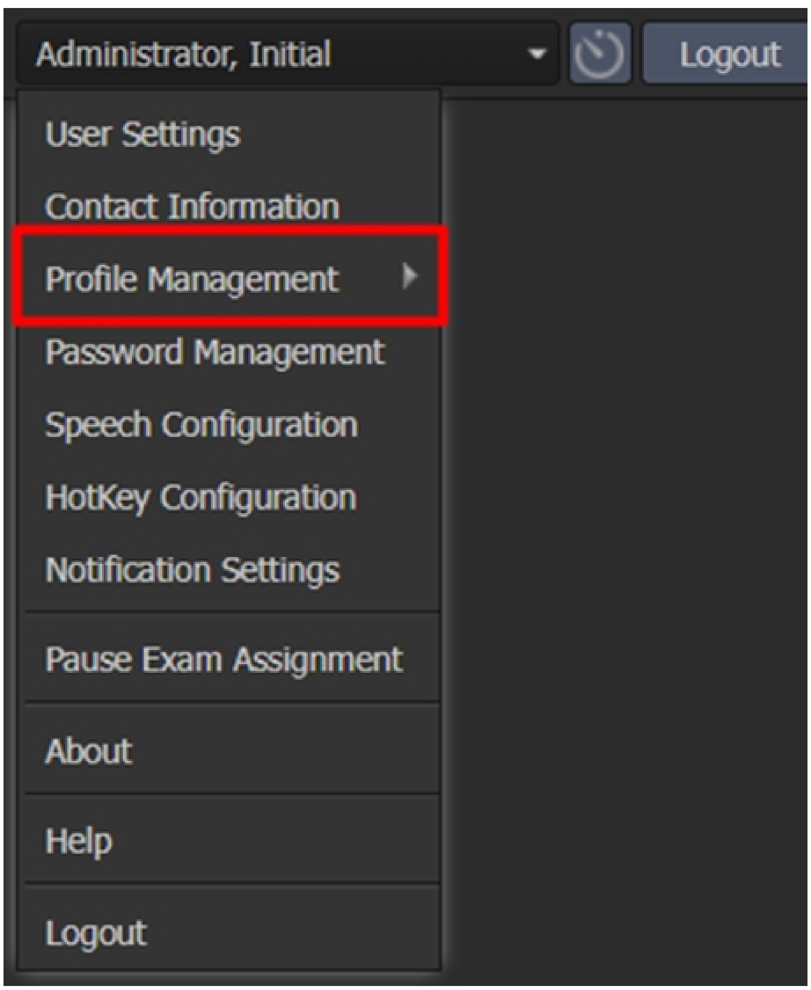
3. Click the profile that you will use during your current shift or work hours. You should now see the change to the behavior as defined in the selected profile.

Setting Your Display Mode

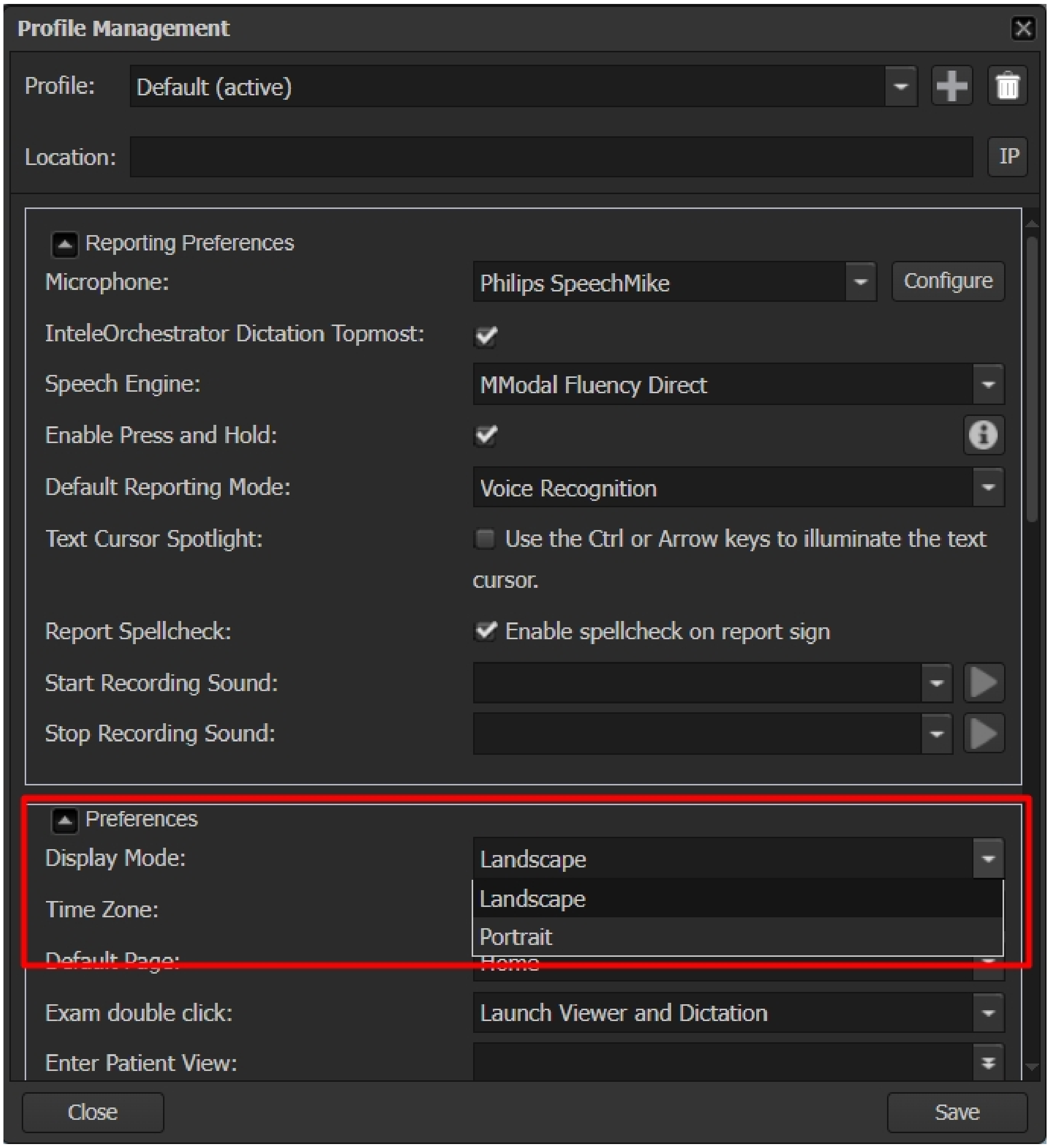
One of the main preferences that you may want to change is the **Display Mode**. You can use this preference to change the report display from landscape mode to portrait mode or the reverse. This will allow you to support the monitor setup that may be different in the different locations that you work.

To set you Display Mode:

1. Click your username in the upper-right corner of the InteleOrchestrator interface.
2. Click **Profile Management.**



3. Under **Preferences**, from the **Display Mode** list, select the mode that you desire.



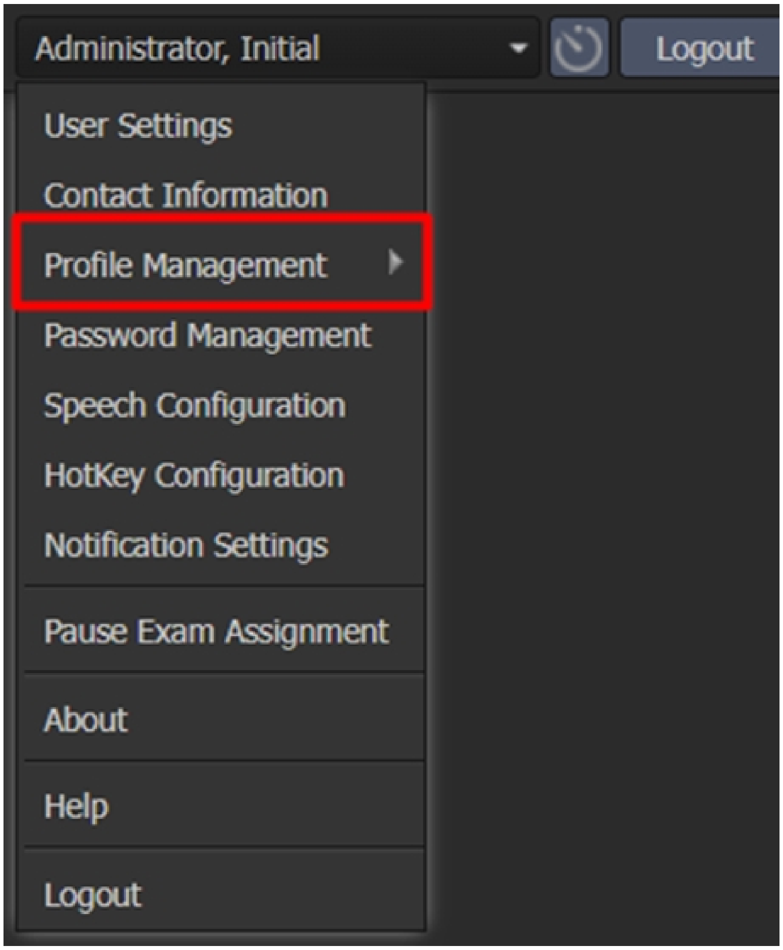
4. Click **Save.**

Setting Your Default Page

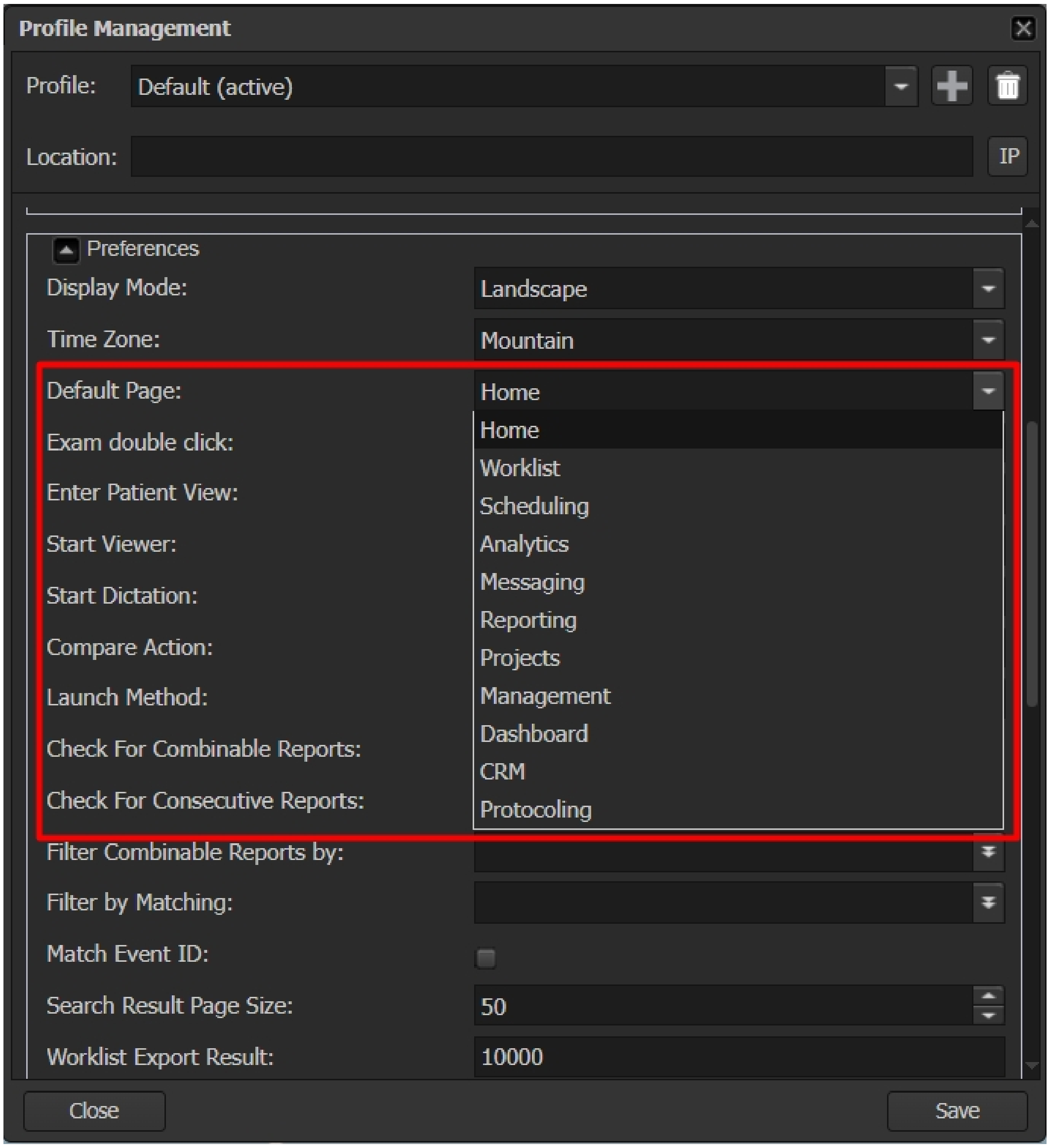
When you log in to InteleOrchestrator, the application opens on the page that is set as your default page. You can choose the **Home** page or any other page to which you have access. Most radiologists select **InteleOrchestrator** as their Default Page to save having to make an extra click at logon.

To set your default page:

1. Click your user name in the upper-right corner of the InteleOrchestrator interface.
2. Click **Profile Management**.



3. Under **Preferences**, from the **Default Page** list, select the page you want as the default.



4. Click **Save**.

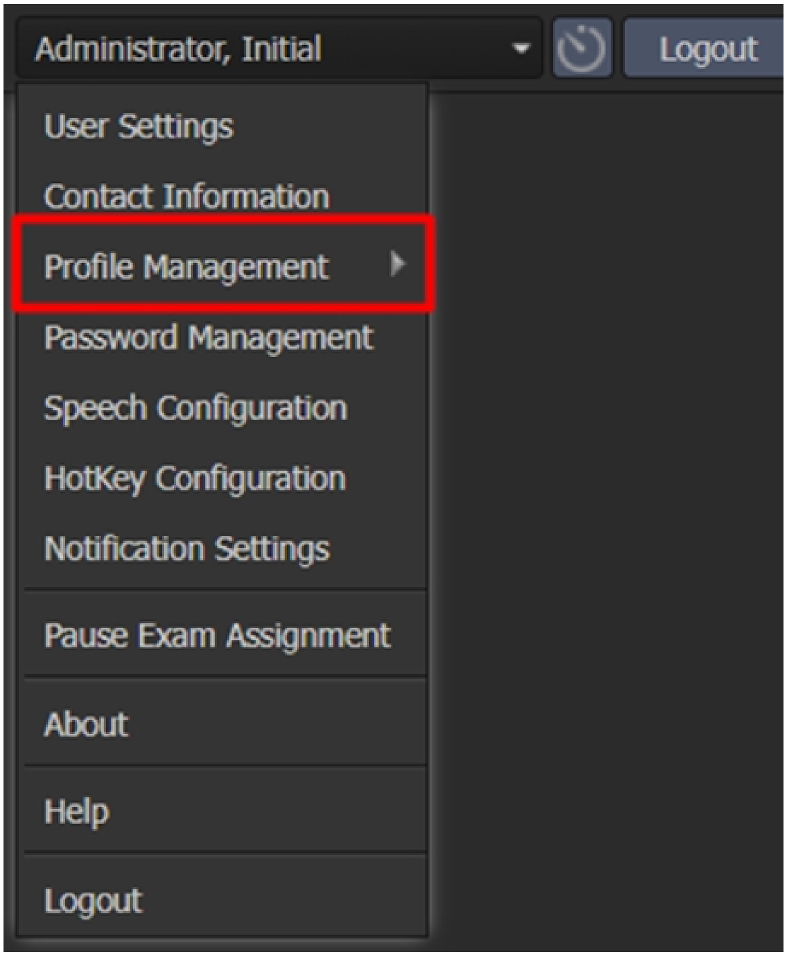
Filtering Your Reading Queue

Use the **Filter My Reading Queue** to exclude exams that have been assigned to another user or to groups that you are not a member of. It's a way to tidy up the worklist a little bit to keep those exams you don't need to see from displaying.

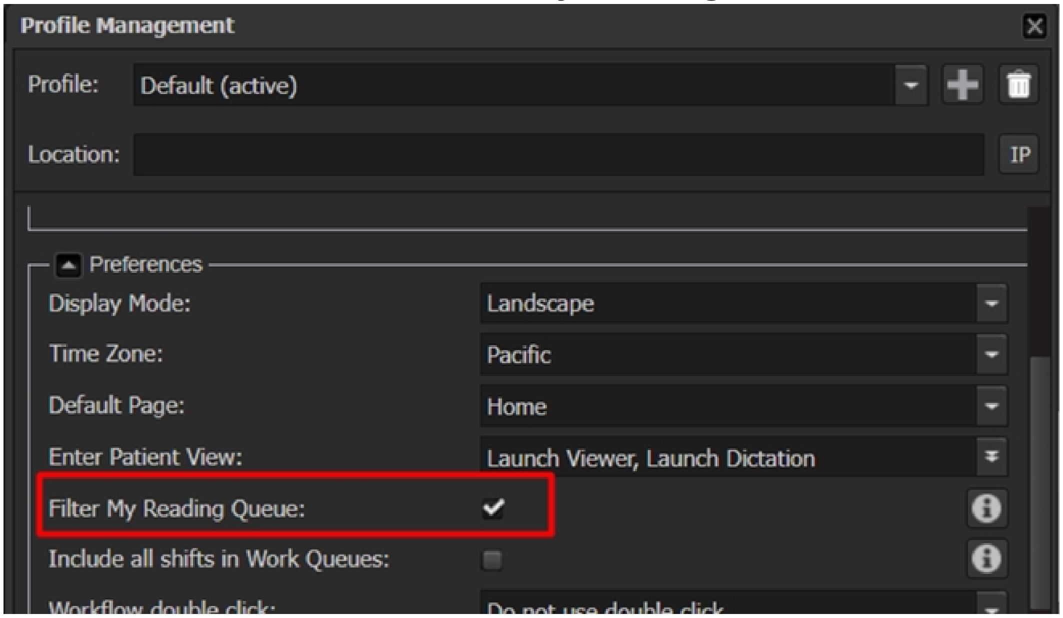
Most practices automatically remove all exams that are assigned to other users from your My Reading Queue.

To set My Reading Queue to show or hide exams assigned to others:

1. Click your user name in the upper-right corner of the InteleOrchestrator interface.
2. Click **Profile Management**.



3. Under **Preferences**, enable **Filter My Reading Queue**.



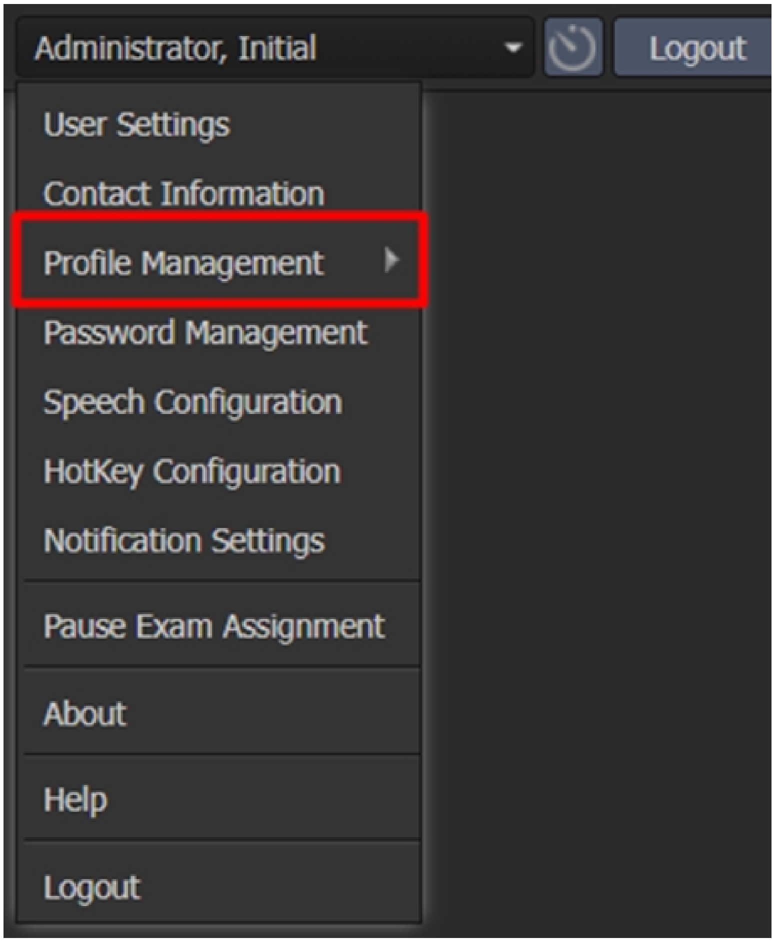
4. Click **Save**.

Including All Shifts On Your Worklist

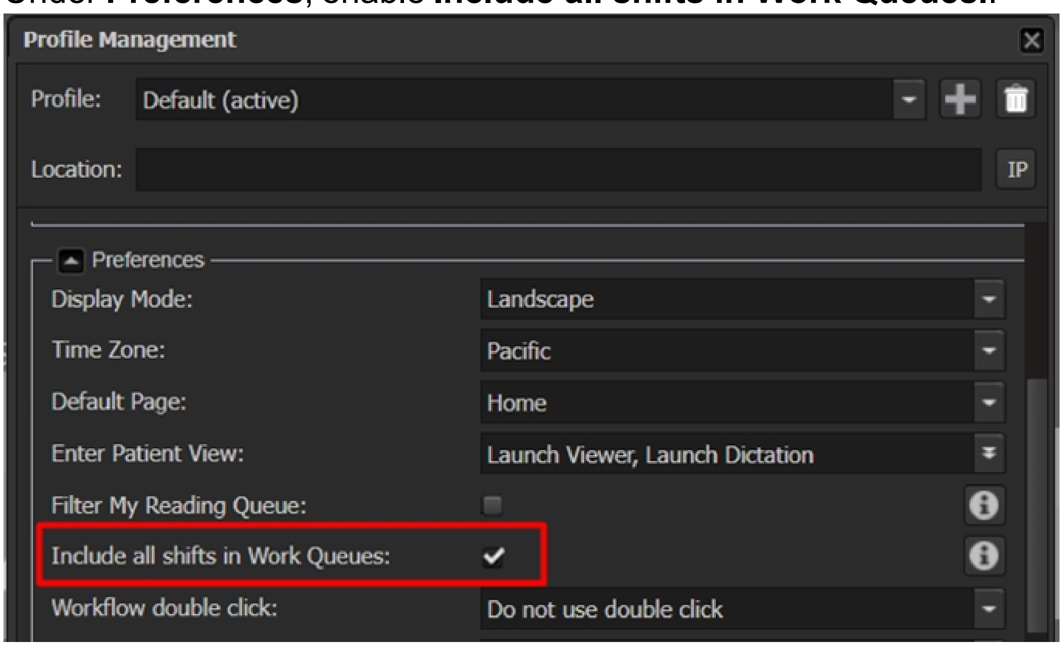
If your practice uses a shift-based workflow, you may be assigned to multiple shifts. If so, InteleOrchestrator prompts you to select your primary shift when you log in. However, you can choose to include all worklists from each shift in your My Reading Queue to see all exams from all shifts that you are reading for that day.

To include all shift worklists in your My Reading Queue:

1. Click your user name in the upper-right corner of the InteleOrchestrator interface.
2. Click **Profile Management**.



3. Under **Preferences**, enable **Include all shifts in Work Queues.**.



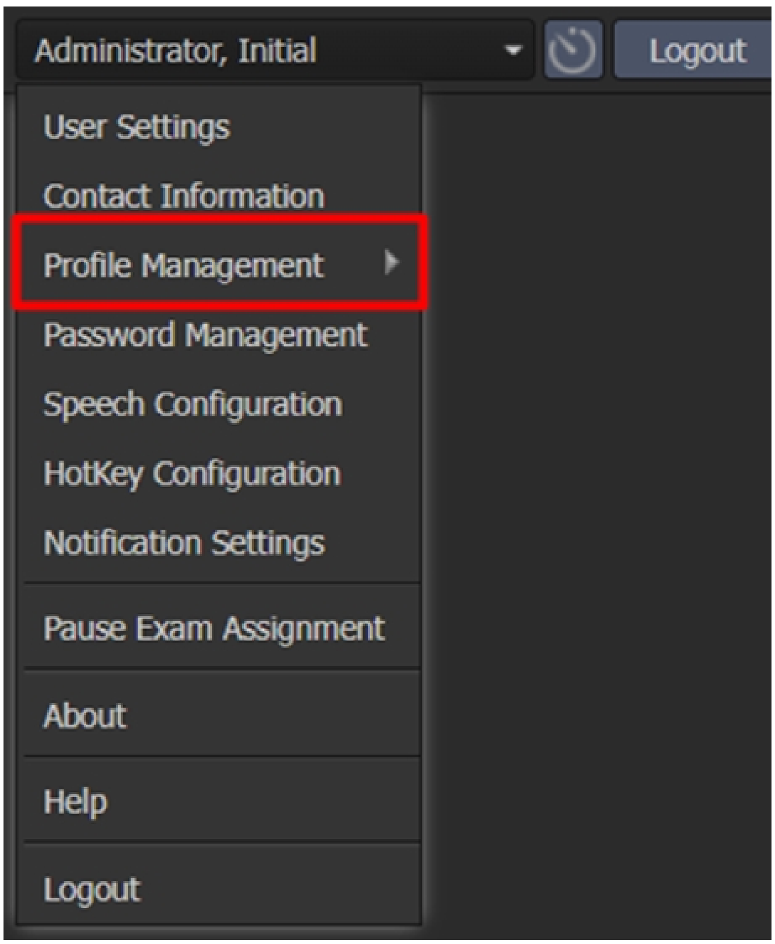
4. Click **Save**.

Exam Double Click

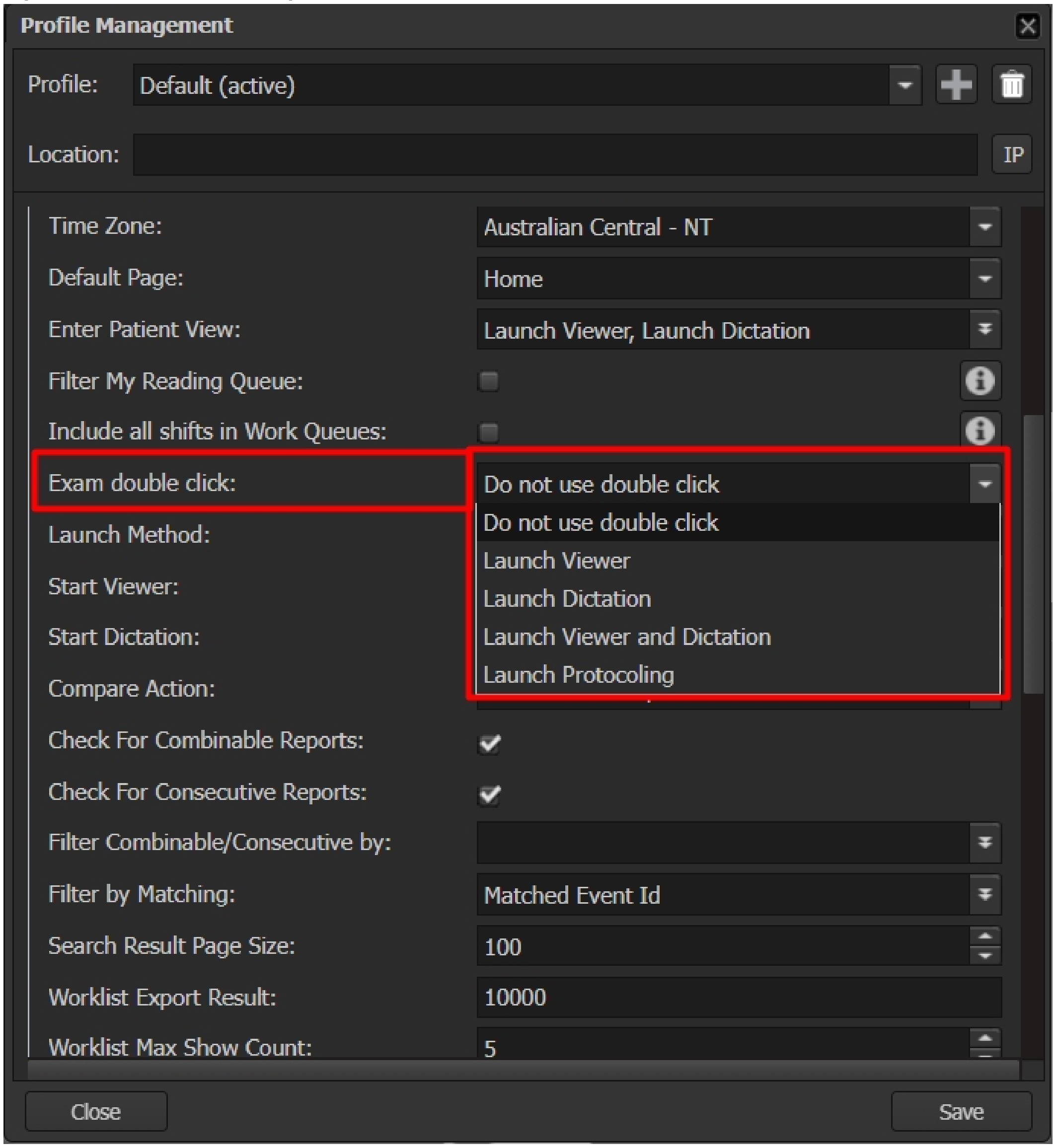
This setting determines the action that InteleOrchestrator will take (if anything) when a user double-clicks on a row within the Worklist/Advanced Search interface. The default behavior is to launch PACS and dictation while entering the patient view.

To set exam double click:

1. Click your user name in the upper-right corner of the InteleOrchestrator interface.
2. Click **Profile Management**.



3. Under **Preferences**, navigate to the **Exam double click** and choose the desired option from the drop-down menu.



4. Click **Save**.

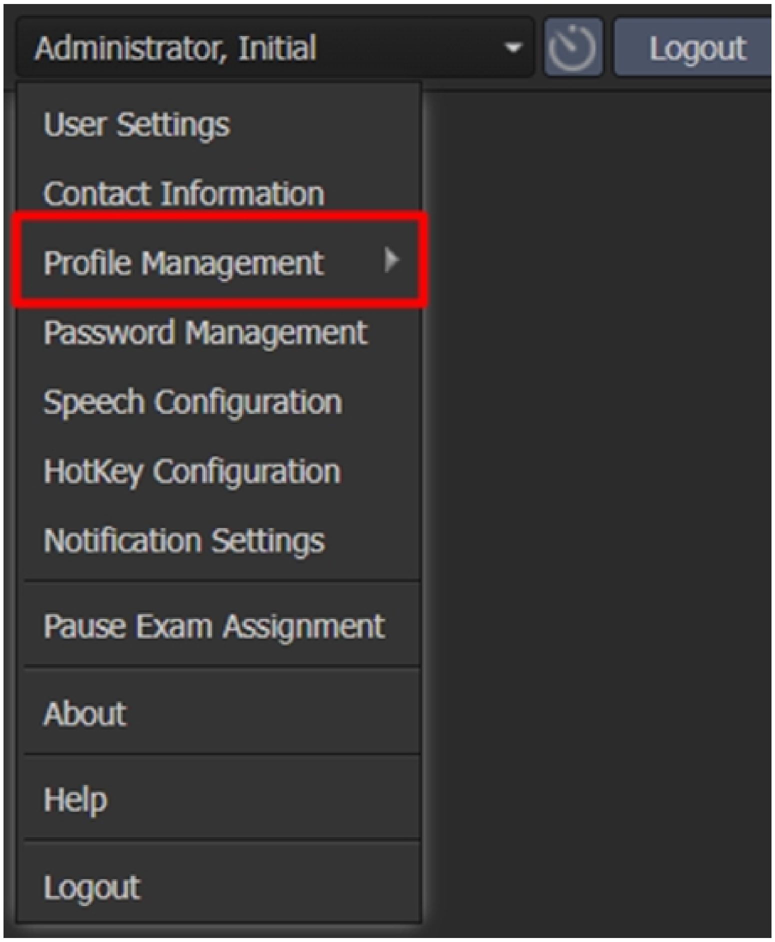
Start Viewer

By checking this box the default PACS system will automatically display when the user launches the Worklist page.

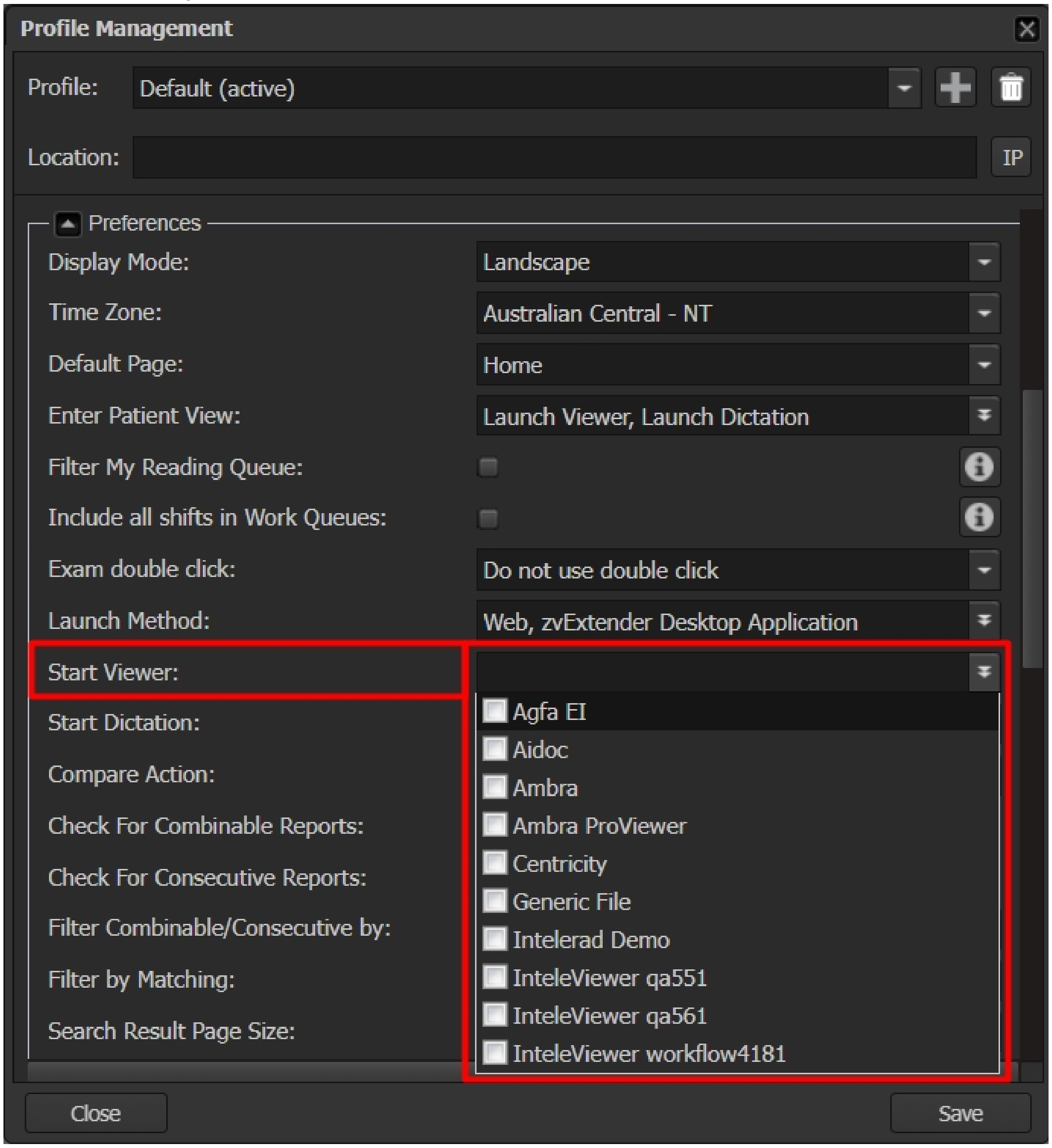
Not all PACS systems can be configured to support this.

To enable the start viewer:

1. Click your user name in the upper-right corner of the InteleOrchestrator interface.
2. Click **Profile Management**.



3. Under **Preferences**, navigate to the **Start Viewer** and choose the desired option from the drop-down menu.



4. Click **Save**.

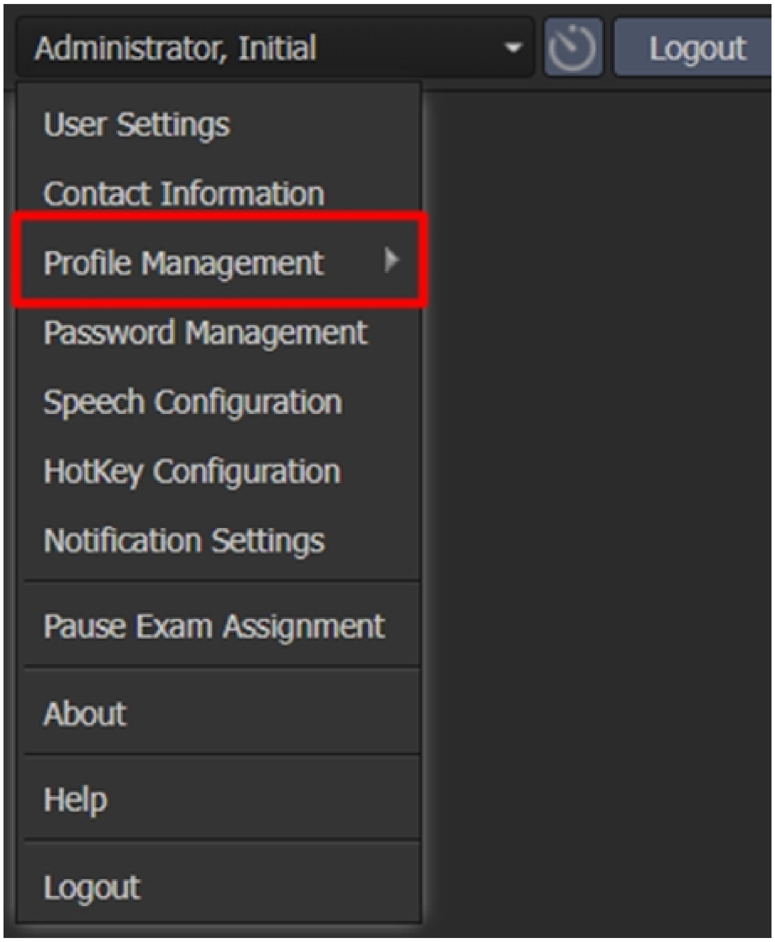
Start Dictation

By checking this box the dictation/voice recognition system will launch based on the selected options when the Worklist page is launched.

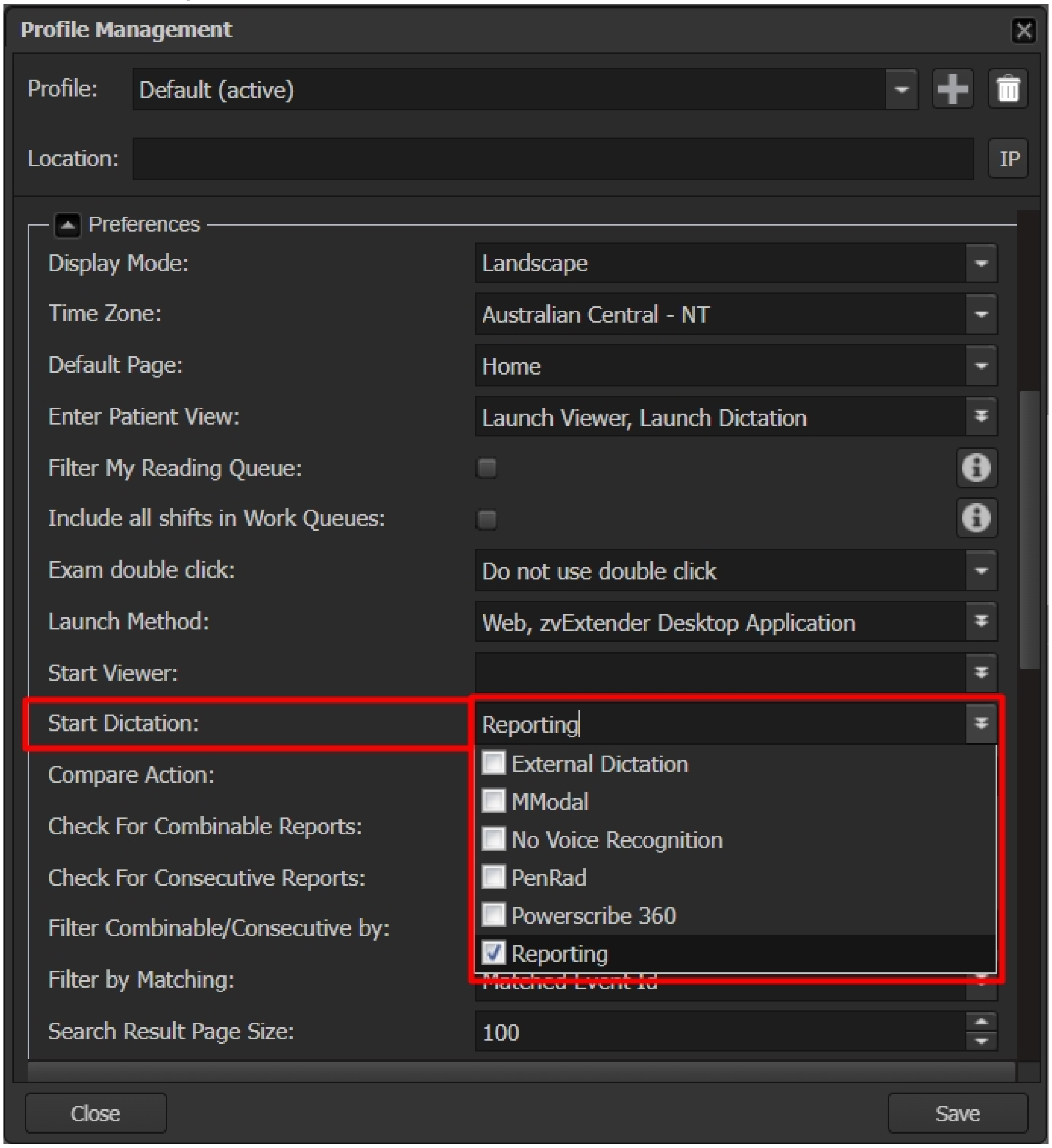
Not all dictation systems can be configured to do this.

To enable the start dictation:

1. Click your user name in the upper-right corner of the InteleOrchestrator interface.
2. Click **Profile Management**.



3. Under **Preferences**, navigate to the **Start Dictation** and choose the desired option from the drop-down menu.



4. Click **Save**.

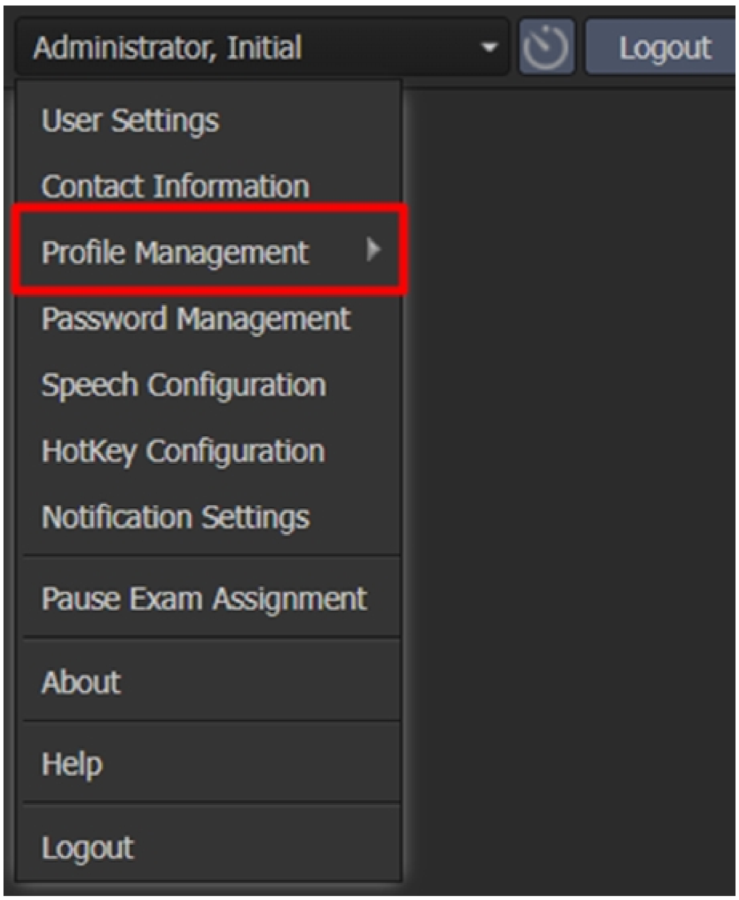
Enabling Combinable or Consecutive Reports

You can configure InteleOrchestrator to prompt you when there are patient exams that could be combined or read consecutively. For example, if you would like to dictate a patient's CT Chest exam and their CT Abdomen/Pelvis exam on the same report, you can configure InteleOrchestrator to prompt you to combine the reports. Or you can configure InteleOrchestrator to prompt you when there are reports that can be read consecutively. For example, your patient may have a screening mammogram that appears in your worklist because of your subspecialty, but also have a breast ultrasound that does not appear in your worklist. If you enable the Consecutive Reports prompt, after you read the screening mammogram, InteleOrchestrator will ask you if you want to read your patient's ultrasound next. This helps ensure all exams for a patient are dictated at the same time.

See Combining Reports and Reading Reports Consecutively to see how to interact with this prompt while reading exams.

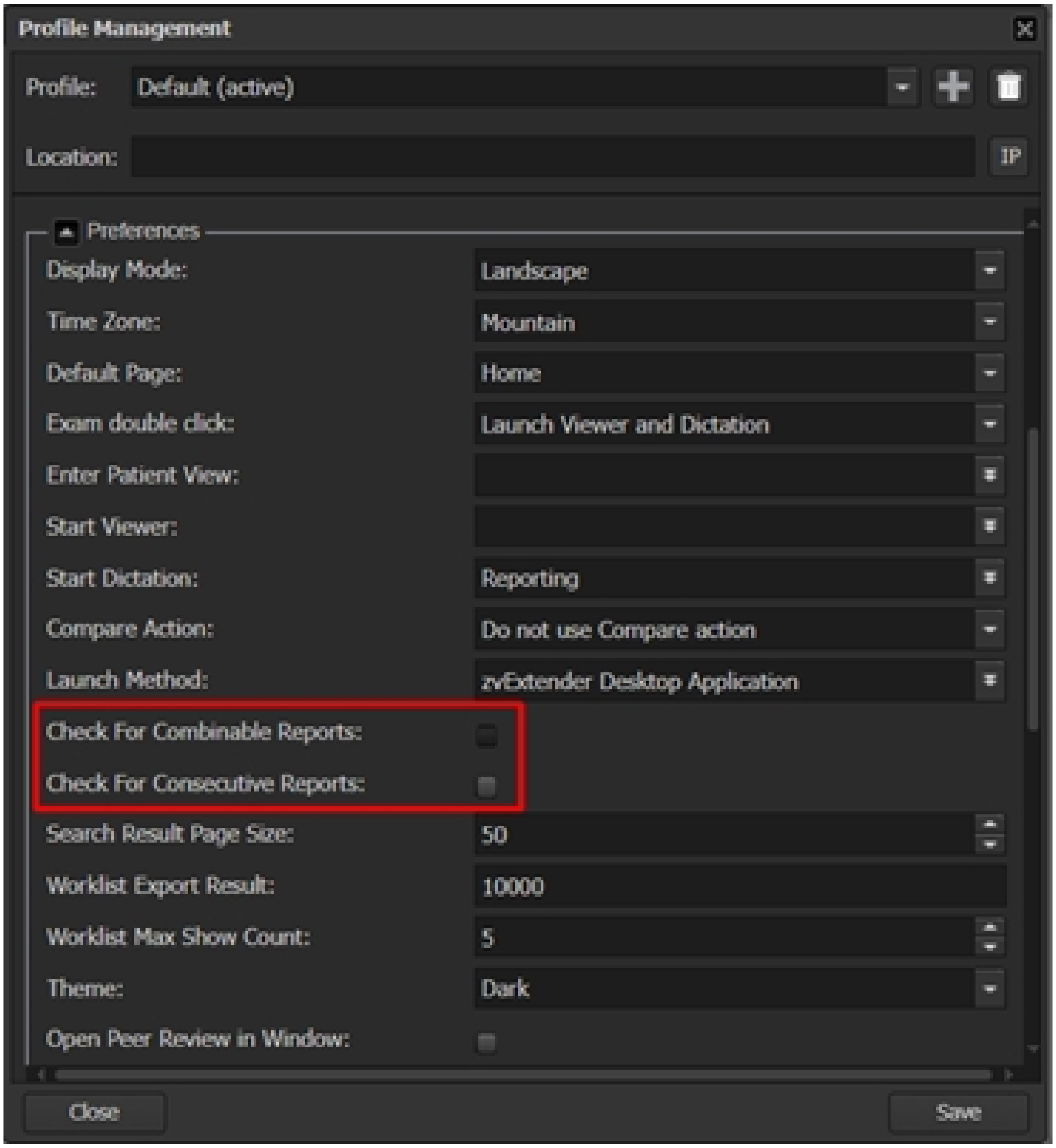
To enable the prompts for combinable or consecutive reports:

1. Click your user name in the upper-right corner of the InteleOrchestrator interface.
2. Click **Profile Management**.

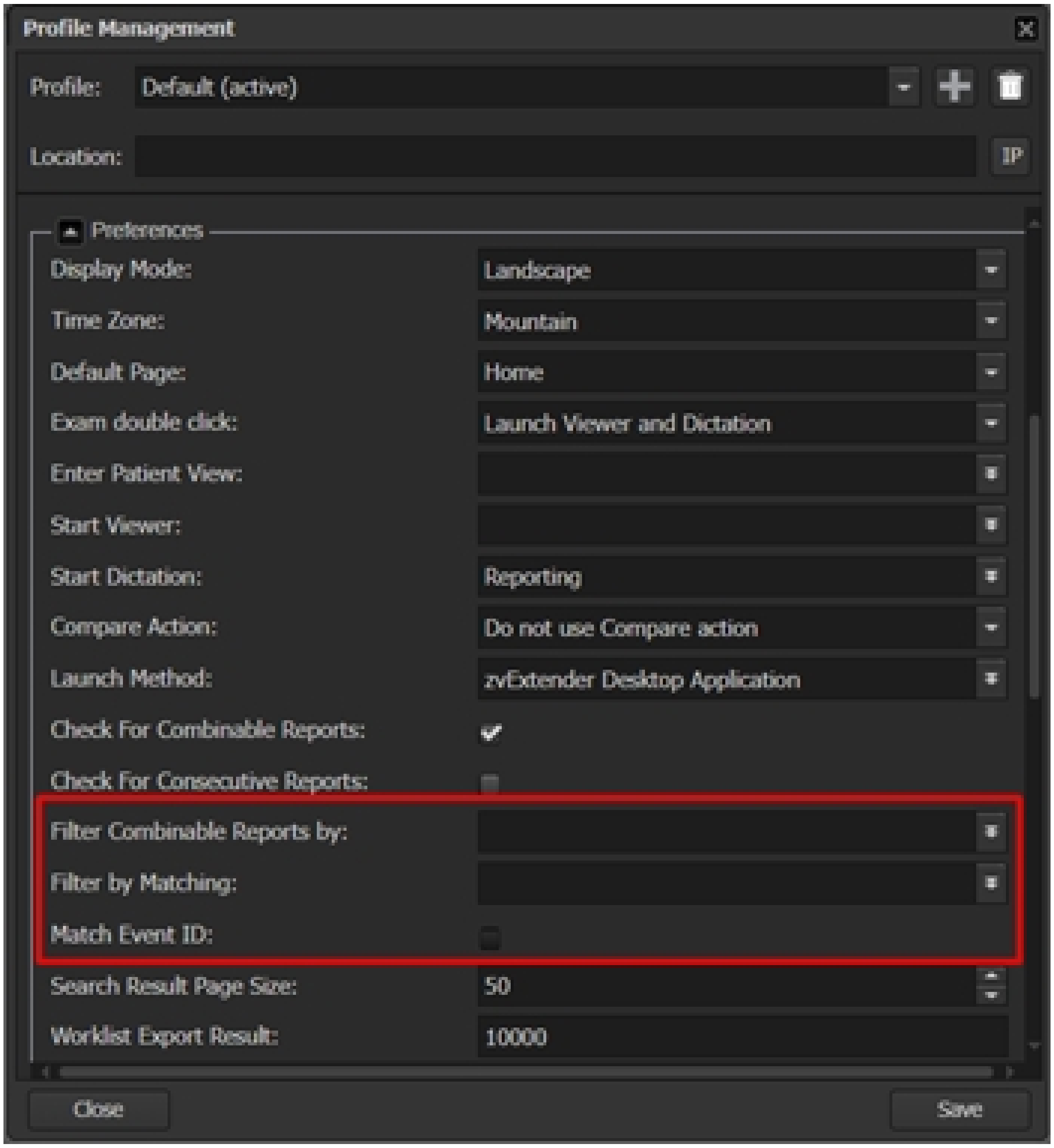


3. Under **Preferences**, do the following:

- Enable Check for Combinable Reports to configure InteleOrchestrator to prompt you to combine the reports.
- Enable Check for Consecutive Reports to configure InteleOrchestrator to prompt you when there are reports that can be read consecutively.



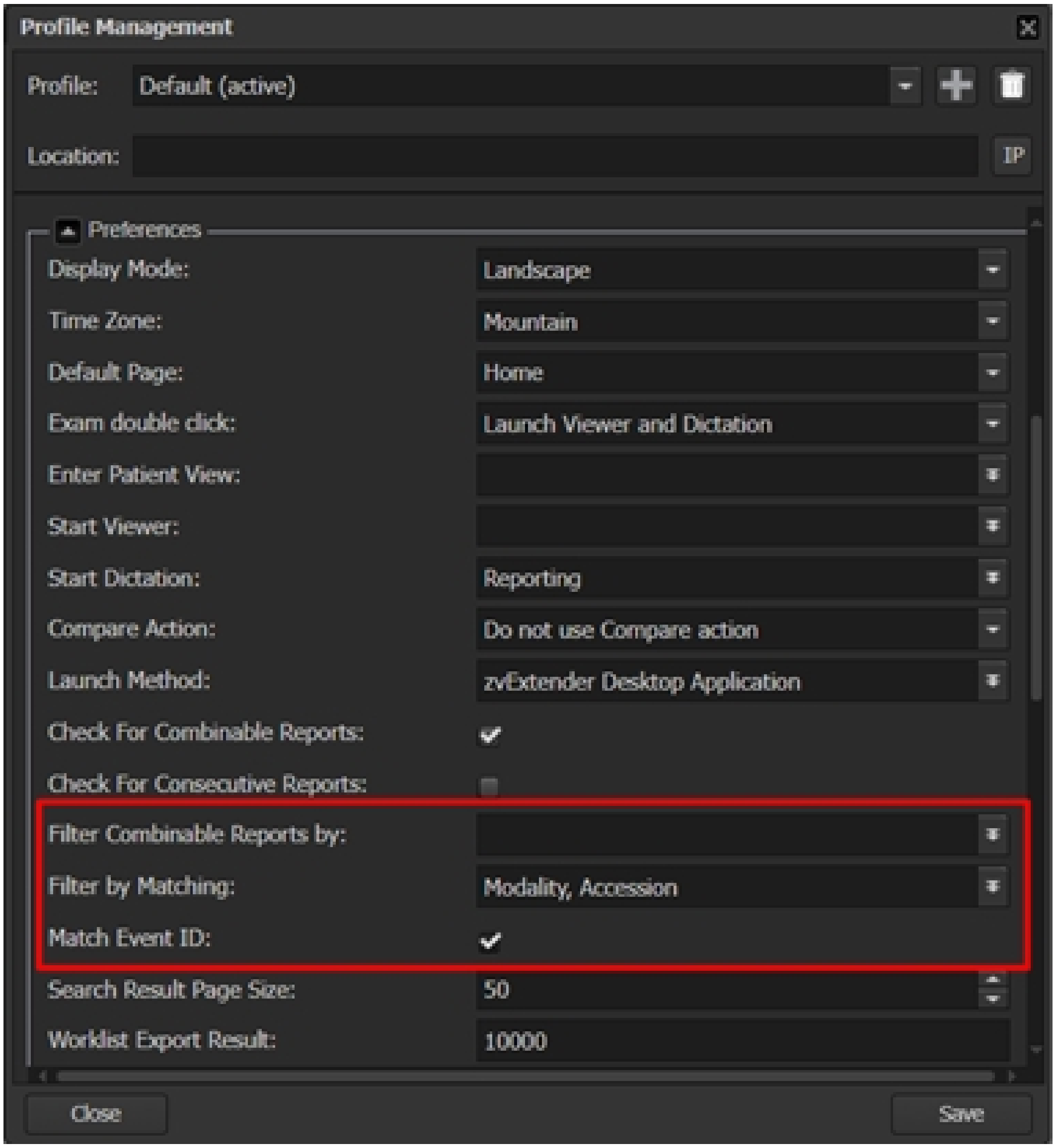
Once **Check for Combinable Reports** is enabled, additional fields such as the **Filter Combinable Reports by**, **Filter by Matching** dropdown and the **Match Event ID** checkbox will appear.



Functionality of each field is as follows:

- **Filter Combinable Reports by**: You can filter the exams to show only exams tagged with specified subspecialty using this field. This might be useful for a subspecialty radiologist who only reads or combines exams within their subspecialty.
- **Filter by Matching**: This field enables you to filter the list to show exams that precisely match the selected criteria, providing a more precise and targeted filtering approach. You can filter the exam list that match the selected criteria such as modality, subspecialty, body part, accession, and site accession.

- **Match Event ID**: This field will find any exams that match the Event ID of the selected exam.



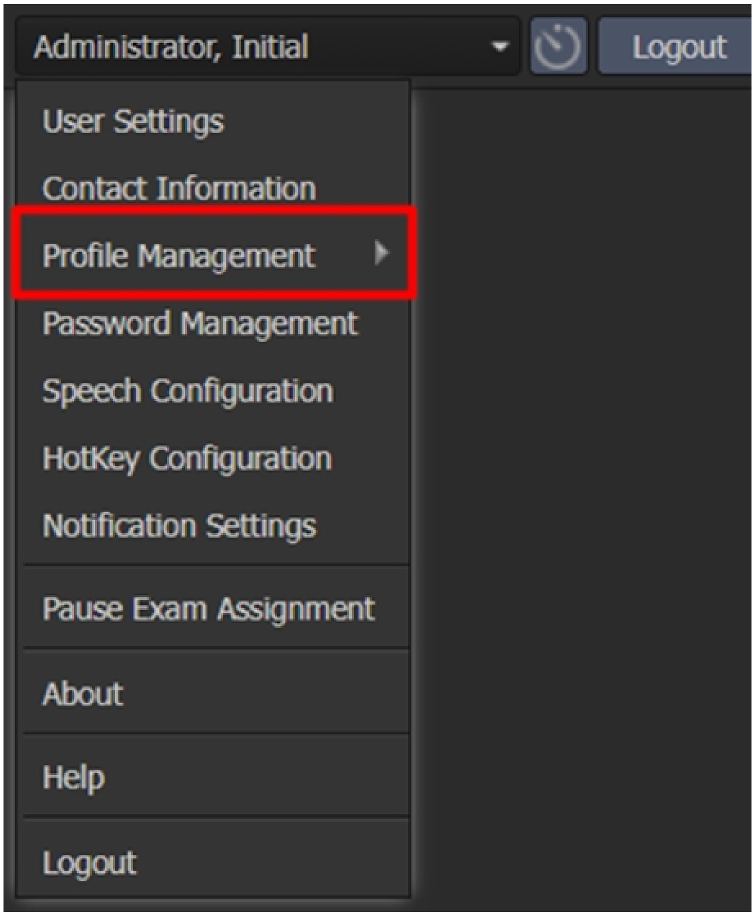
4. Click **Save**.

Selecting Sounds

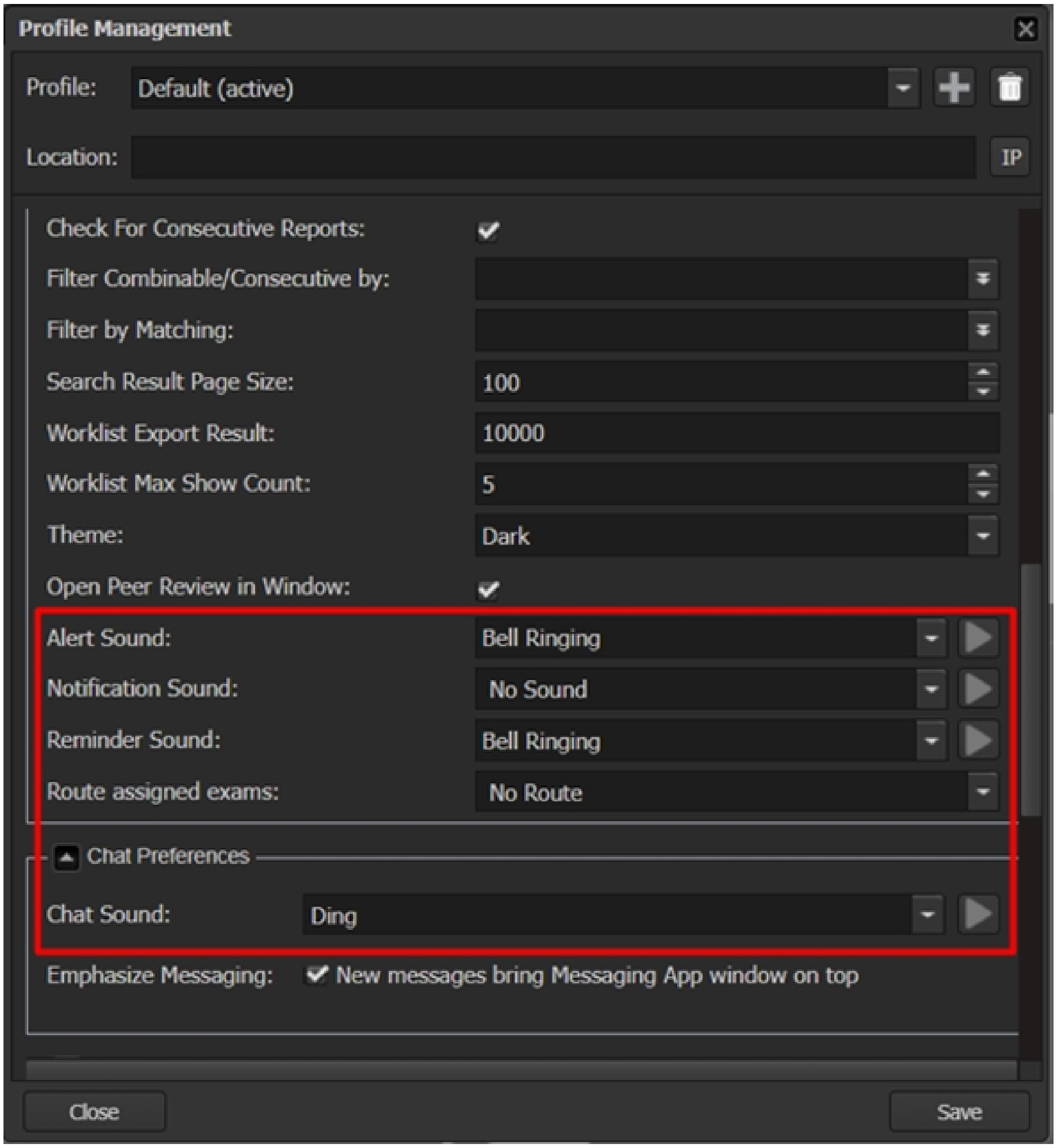
InteleOrchestrator can play sounds when you receive an alert, notification, message, or collaboration in InteleOrchestrator. You can customize or disable the sound for each notification individually.

To select a sound:

1. Click your user name in the upper-right corner of the InteleOrchestrator interface.
2. Click **Profile Management**.



3. Select a sound option from the corresponding list in the **Preferences** section (alert, notification, reminder) or **Chat Preferences** section (Messaging).



Click **Play** to listen to a sample of the currently selected sound.

4. Click **Save**.

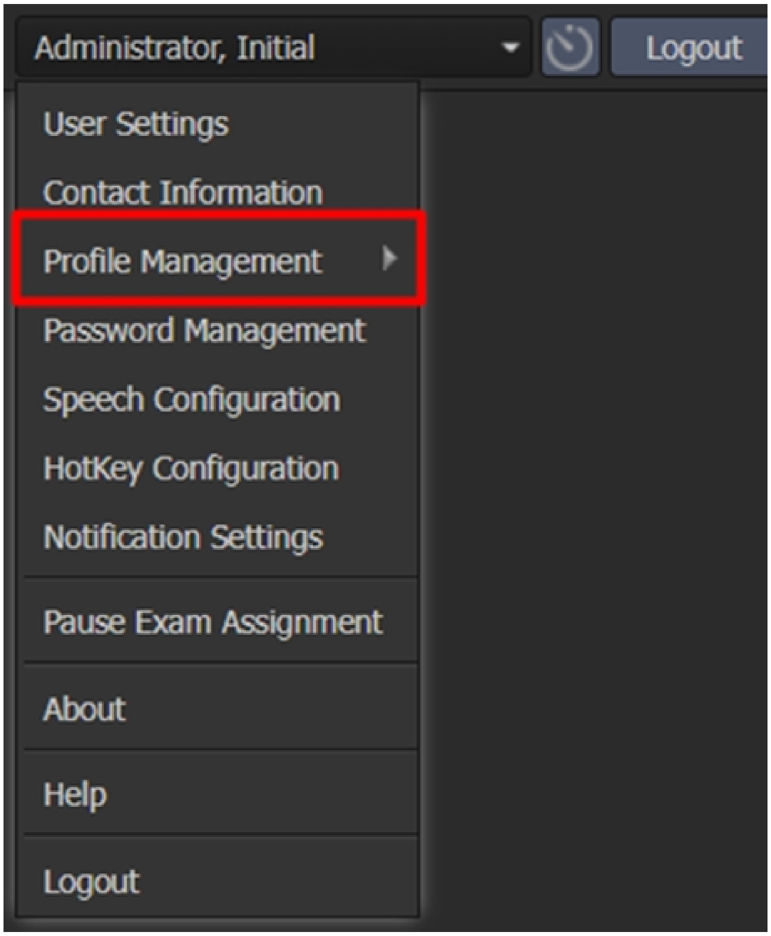
Setting Search Result Page Size

When the Advanced Search functionality is used, InteleOrchestrator will limit the results to a maximum number of exams. Changing this value will set the maximum number of exams returned. This will not have any impact when doing a Count-type search or when doing an Export.

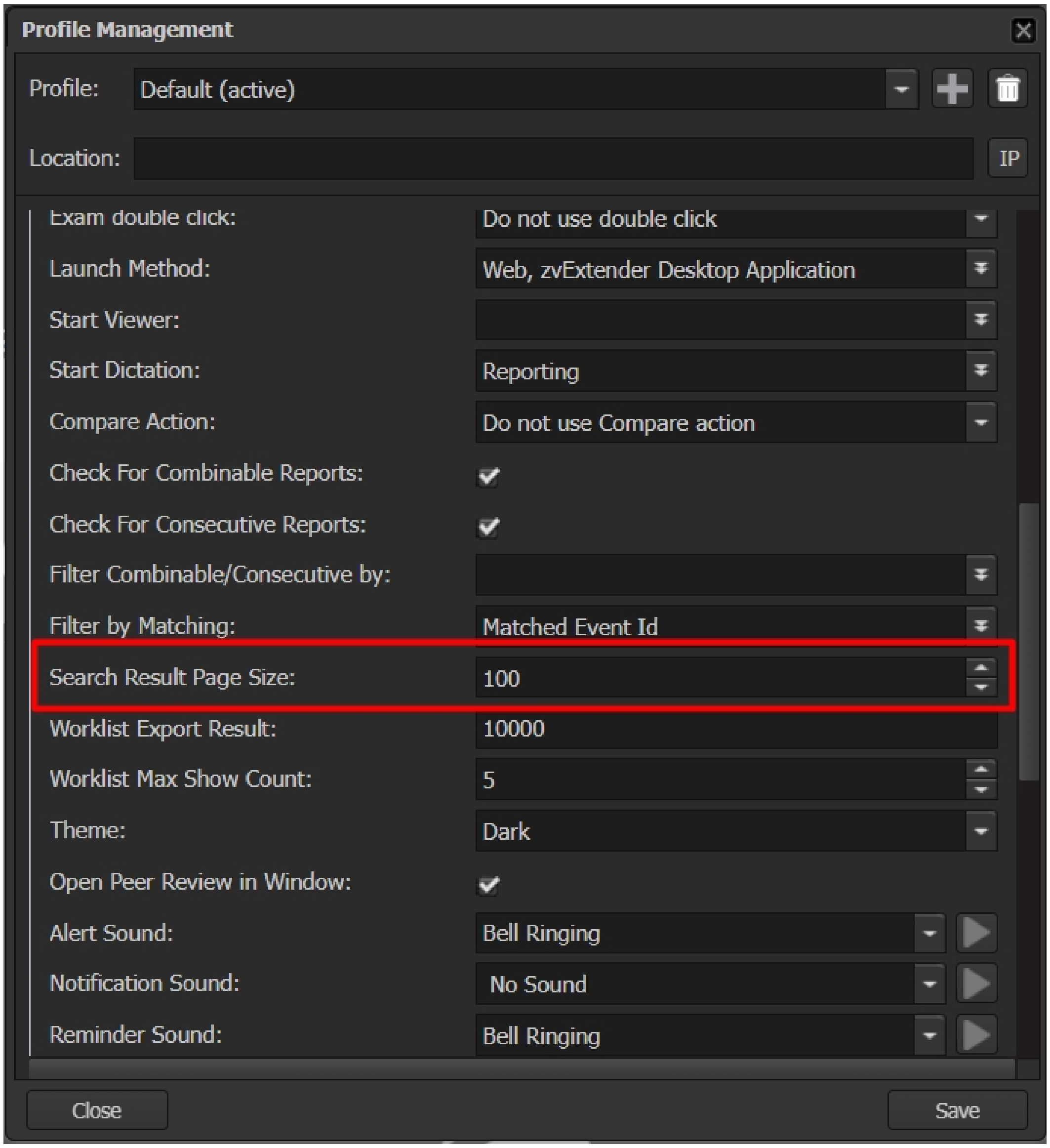
Setting this value to a high number may have performance consequences, both on the user's local system and on the server (potentially impacting all users)

To set up a search result page size:

1. Click your username in the upper-right corner of the InteleOrchestrator interface.
2. Click Profile Management.



3. Under **Preferences**, in the **Search Result Page Size** field, enter the number of exams to display on a single page.



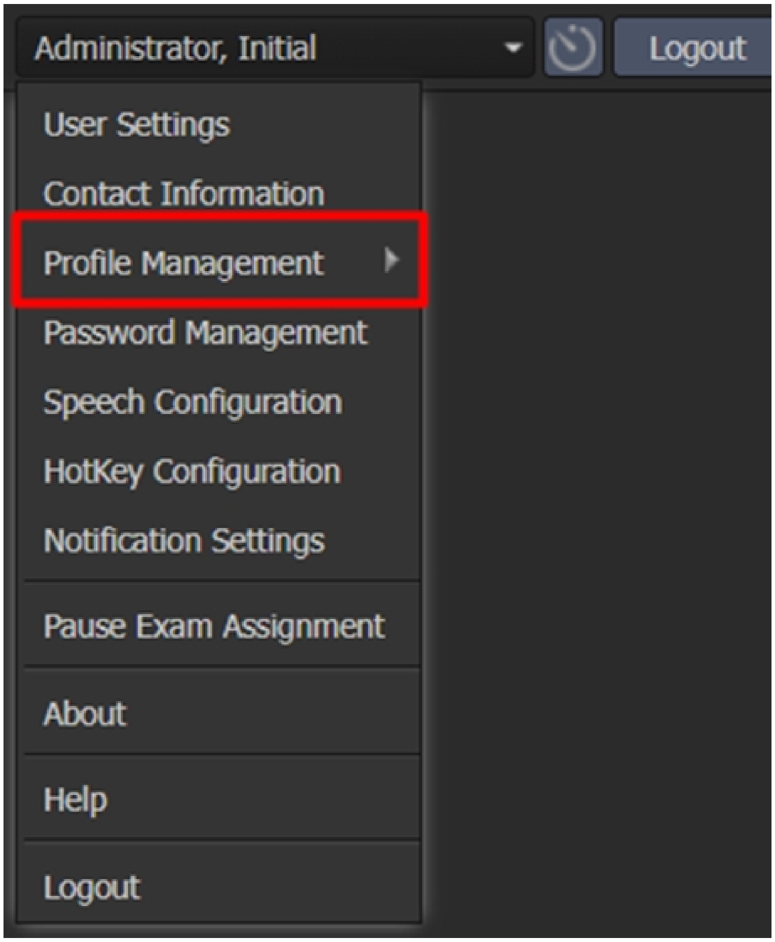
4. Click **Save.**

Worklist Max Show Count

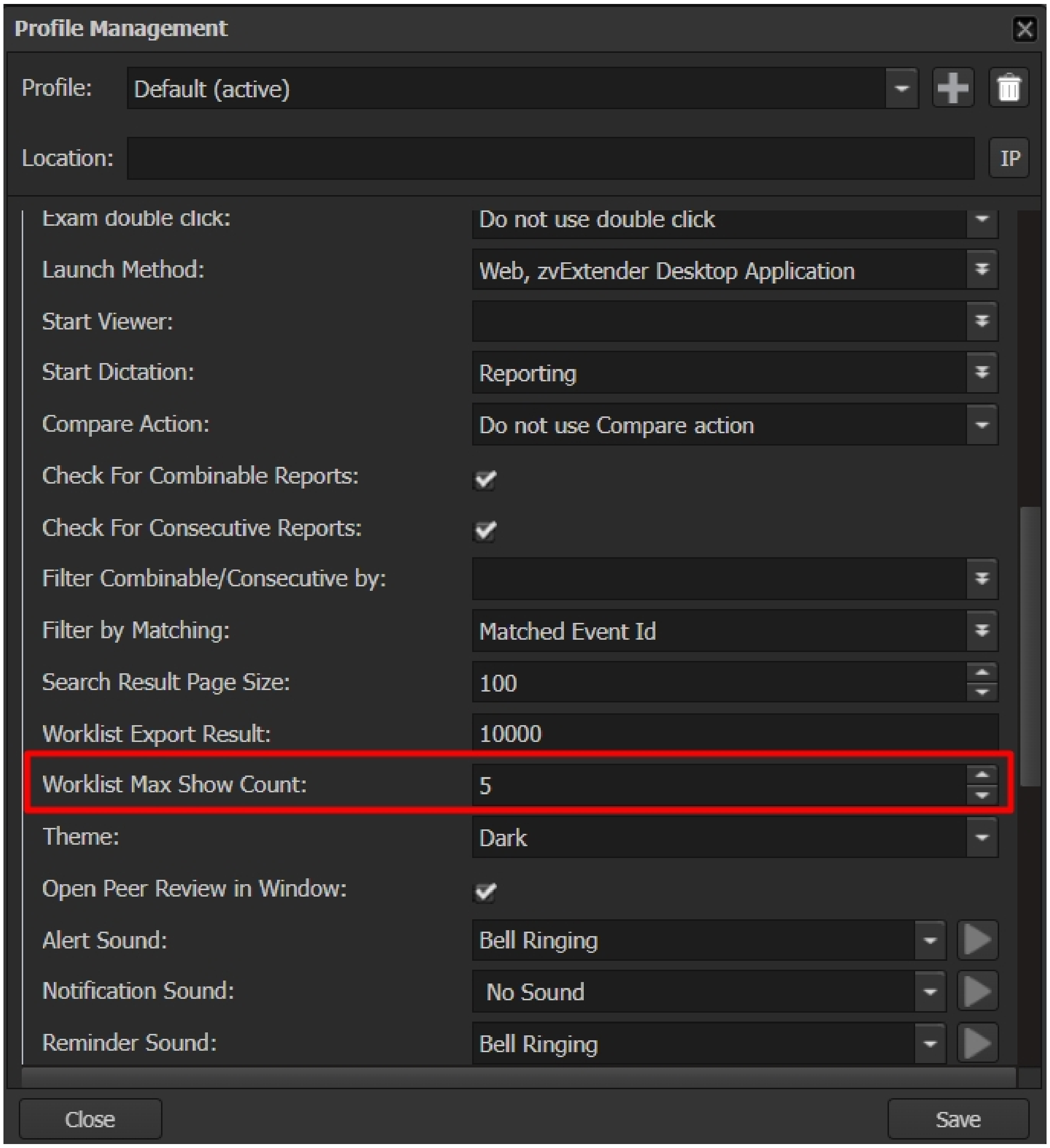
In the Worklist tree on the Worklist page a user can select an option to show a count of how many exams are in a given worklist (without having to actually load the worklist). For performance reasons, the user is normally limited to only being able to turn on Show Count to a few worklists. Adjusting this value will set how many worklists can be set to Show Count.

To set up a worklist max show count:

1. Click your user name in the upper-right corner of the InteleOrchestrator interface.
2. Click **Profile Management**.



3. Under **Preferences**, in the **Worklist Max Show Count** field, enter the number of exams to display on a single page.



To avoid scrolling through an overly long list, a maximum of 200 exams is recommended.

4. Click **Save**.

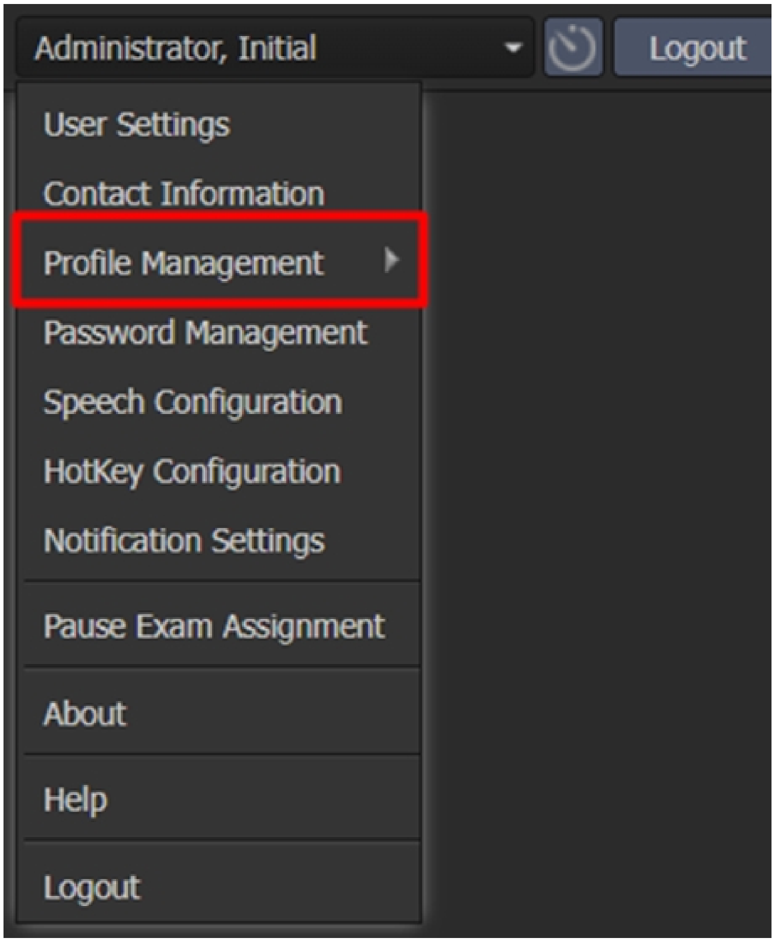
Open Peer Review in Window

Users can configure their profile to open the peer review window when initiating a peer review from a patient view. For more information about using Peer Review, see About Peer Review Workflow.

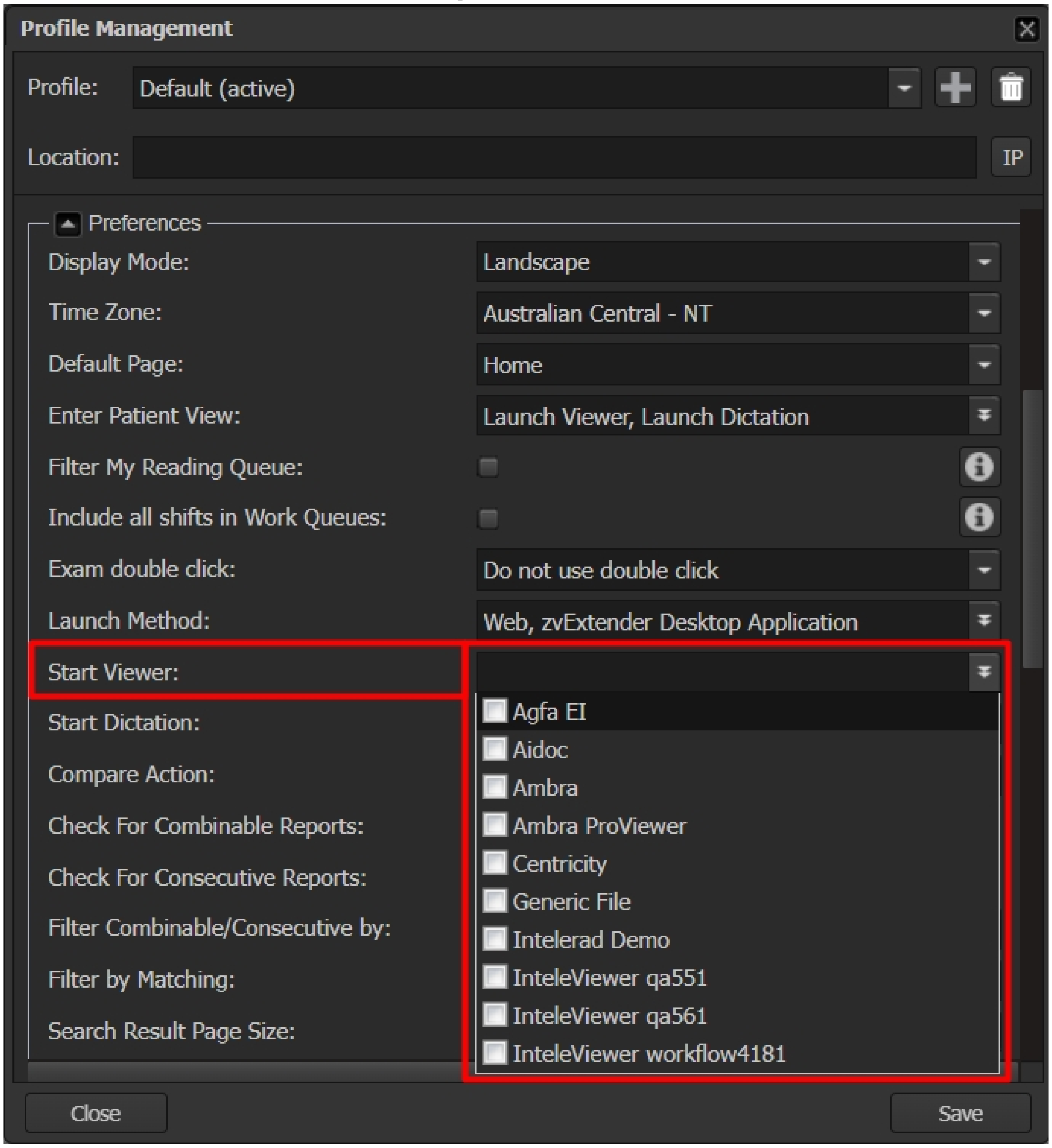
Popup blocker needs to be turned off in order to use this feature.

To open peer review in window:

1. Click your user name in the upper-right corner of the InteleOrchestrator interface.
2. Click **Profile Management**.



3. Under **Preferences**, enable **Open Peer Review in Window**.



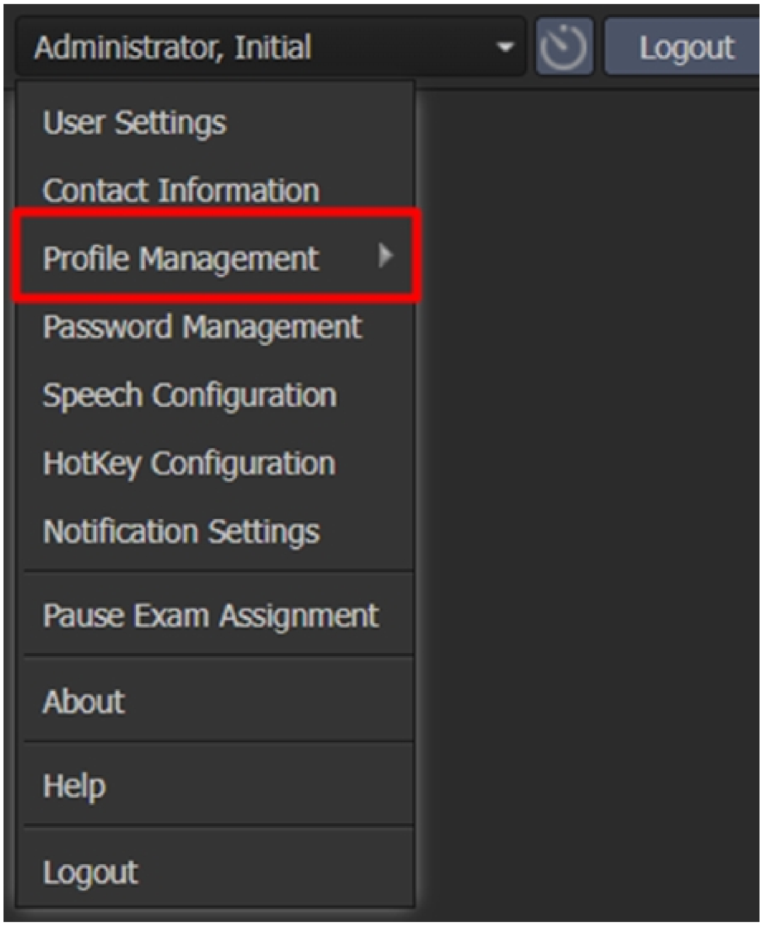
4. Click **Save**.

Changing the InteleOrchestrator Theme

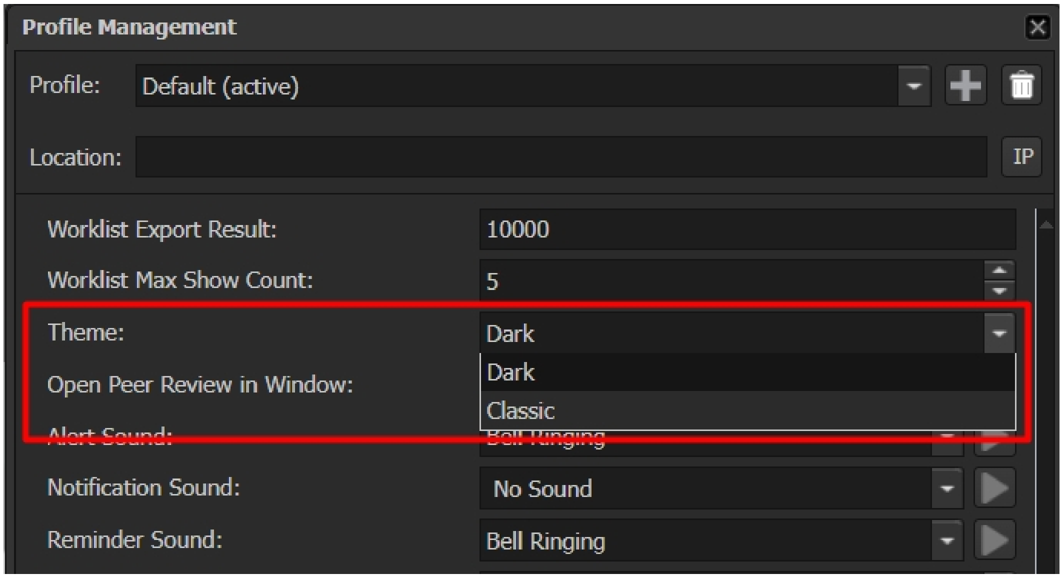
You can change the color theme of the InteleOrchestrator interface to suit your working environment. You can choose between two color themes: Dark (default), or Classic.

To edit the InteleOrchestrator theme:

1. Click your user name in the upper-right corner of the InteleOrchestrator interface.
2. Click **Profile Management**.



3. Under **Preferences**, from the **Theme** list, select the theme you want to use:



- Dark Theme: Darker backgrounds and lighter text.
- Classic Theme: Blue-gray backgrounds with dark text.

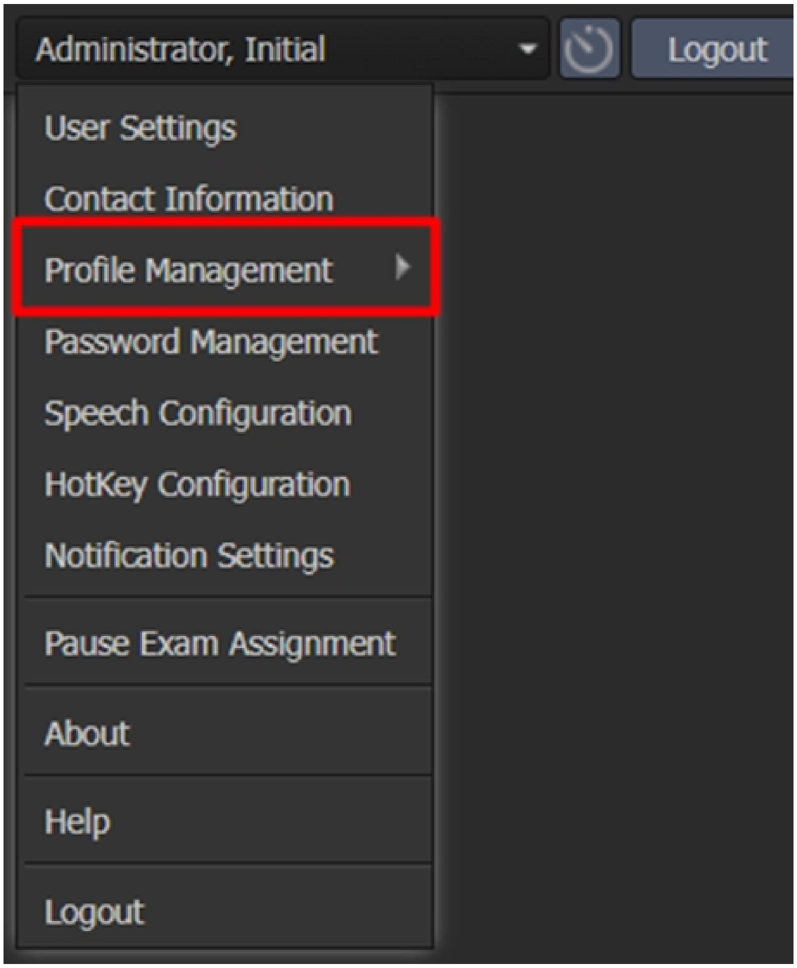
4. Click **Save**
5. Log out of InteleOrchestrator, and then log back in to apply the new theme. See "Logging in to InteleOrchestrator".

Setting the Default Image Viewer and Dictation System

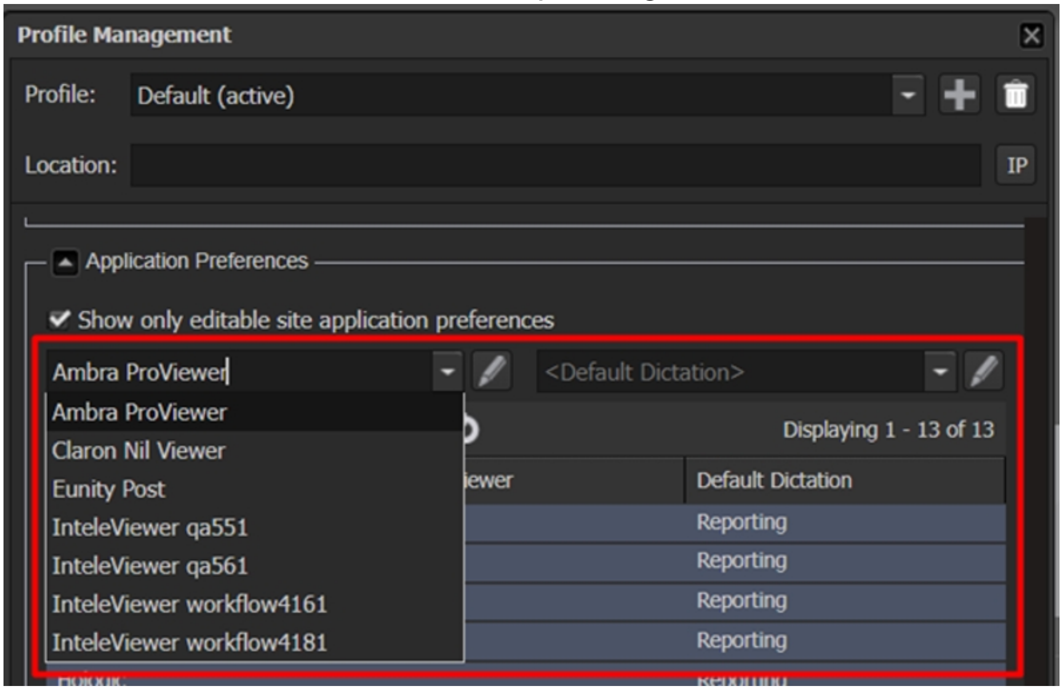
If your practice uses multiple image viewers or dictation systems, you can set the default image viewer and dictation system you want to use, or you can set the viewer and dictation systems individually for each site that you read for in InteleOrchestrator.

To set the default image viewer and dictation system for all sites:

1. Click your user name in the upper-right corner of the InteleOrchestrator interface.
2. Click **Profile Management**.


Administrator, Initial
Logout
User Settings
Contact Information
Profile Management
Password Management
Speech Configuration
HotKey Configuration
Notification Settings
Pause Exam Assignment
About
Help
Logout

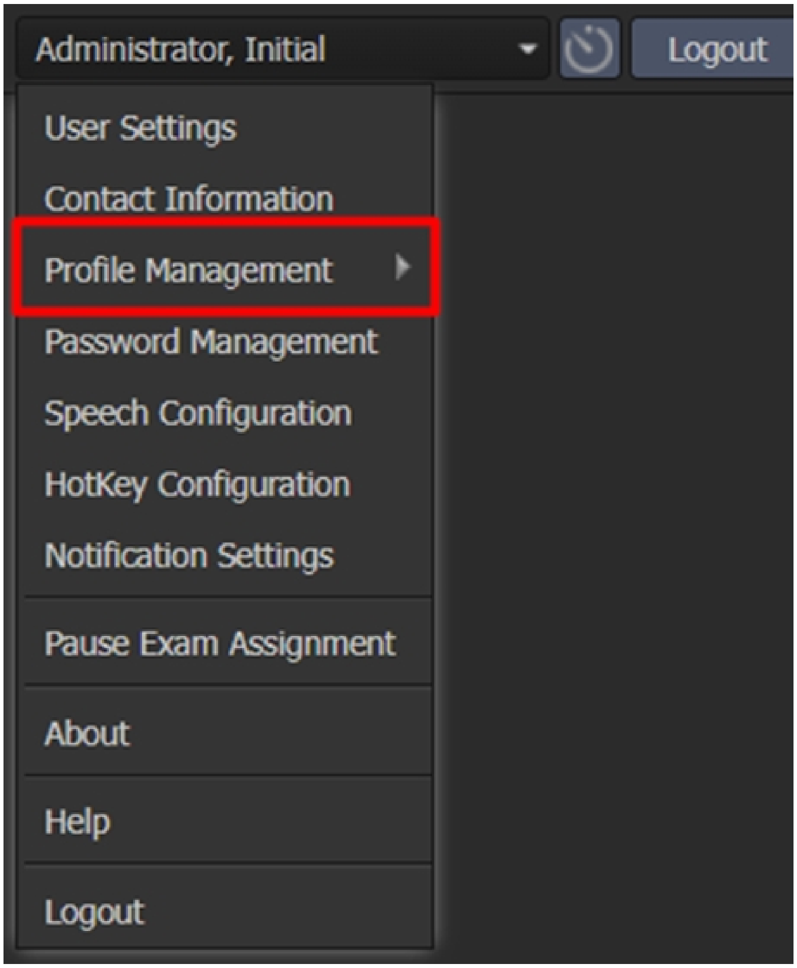
3. Under **Application Preferences**, select an option from the **Default Viewer** or **Default Dictation** list for the corresponding site.



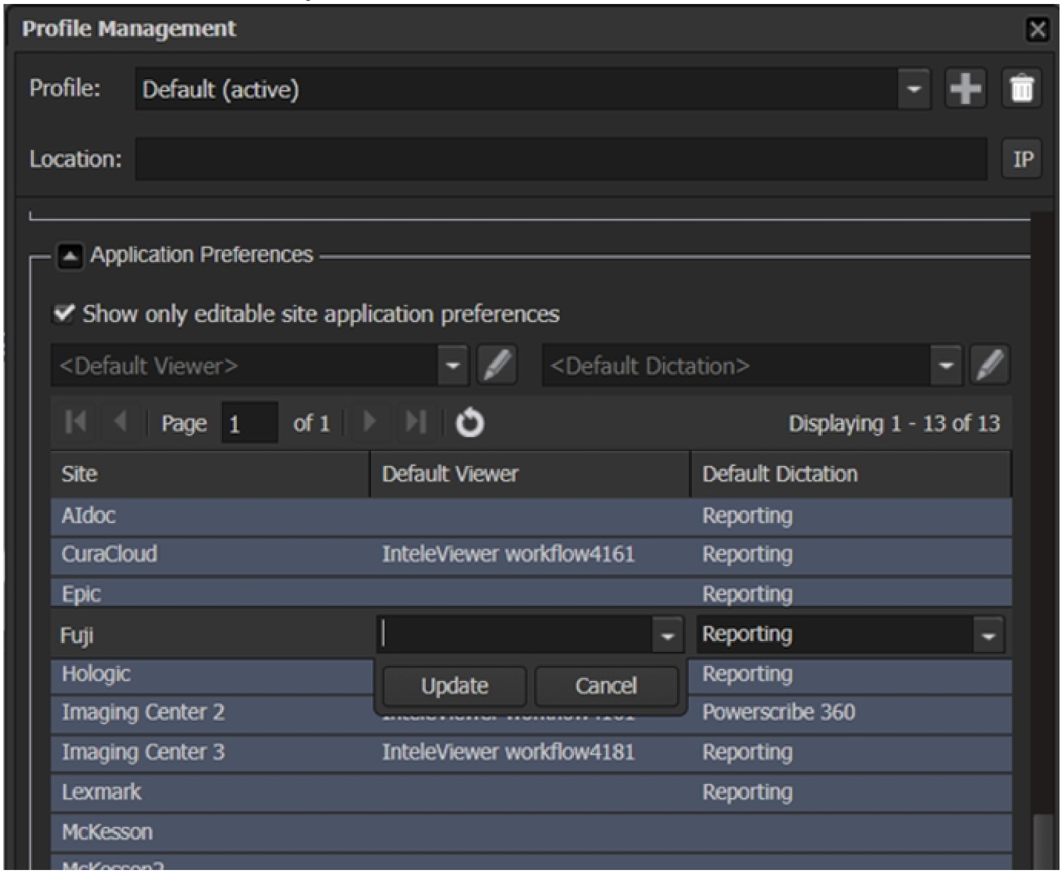
4. Click the pencil icon to apply the selected preference to all sites.
5. Click **Save**.

To set the default image viewer and dictation system for a single site:

1. Click your user name in the upper-right corner of the InteleOrchestrator interface.
2. Click **Profile Management**.


Administrator, Initial
Logout
User Settings
Contact Information
Profile Management
Password Management
Speech Configuration
HotKey Configuration
Notification Settings
Pause Exam Assignment
About
Help
Logout

3. Under **Application Preferences**, click the site in which you want to change the viewer or dictation system.



4. In the drop-down list of options, select the viewer or dictation system you want to use for this site.
5. Click **Update**.
6. Click **Save**.

3

WORKLISTS AND EXAMS

InteleOrchestrator uses your practice's business logic to create worklists customized for you. Using these worklists, you can read exams, dictate reports, collaborate with fellow radiologists, and much more.

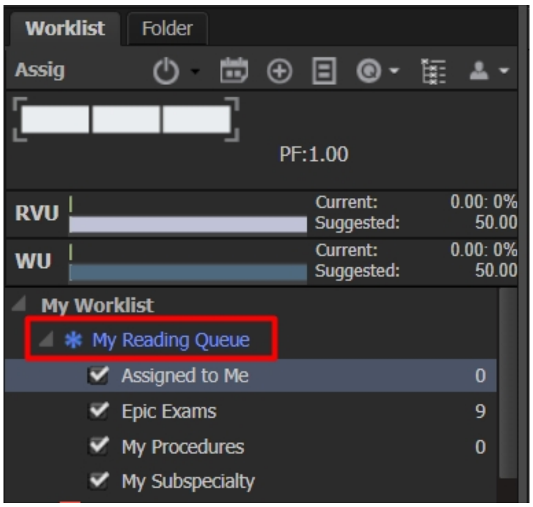
In this chapter:

Managing My Reading Queue

The My Reading Queue section of InteleOrchestrator is considered your master worklist. If you are using a shift-based workflow, you will see all worklists associated with a shift under your **My Reading Queue**. These worklists will automatically populate as soon as your shift is selected.

Expand **My Worklist** to locate **My Reading Queue** in the worklist panel.

If your group is not using a shift-based workflow and you have the permissions, see Manually Creating the My Reading Queue.



The ordering of the worklists within My Reading Queue is important, as this is a combined or stacked worklist based on the shifts you are working.

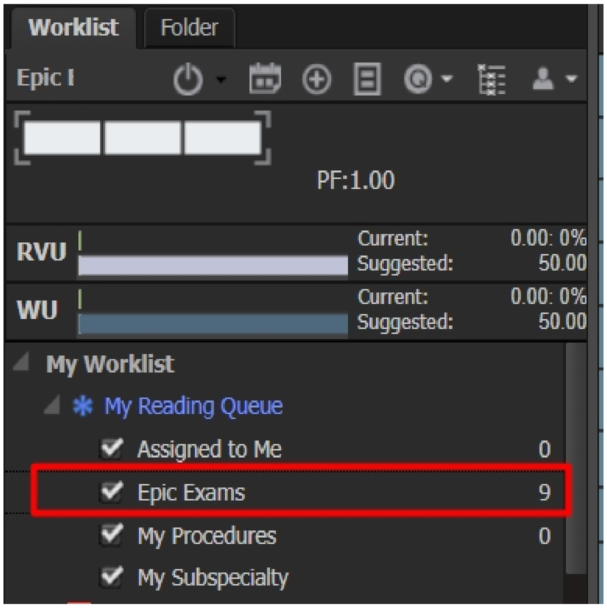
When you begin your shift, you should start at the top of the My Reading Queue and work down through the worklist.

Customizing My Reading Queue

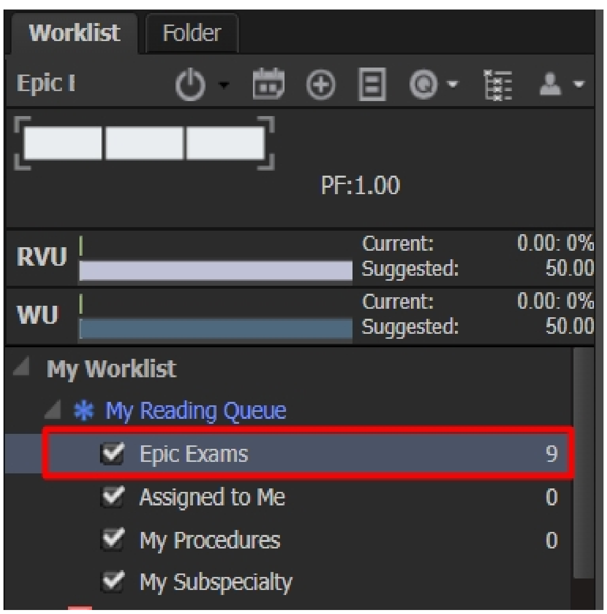
If you desire a different ordering of My Reading Queue and you have the permission to do so, you can drag and drop the worklists to set the reading priority. For example, you may want to read all the exams in the **Epic Exams** worklist first.

To reorder My Reading Queue worklists:

1. Click and hold the worklist that you wish to move.



2. Drag the selected worklist to the new location within the My Reading Queue.



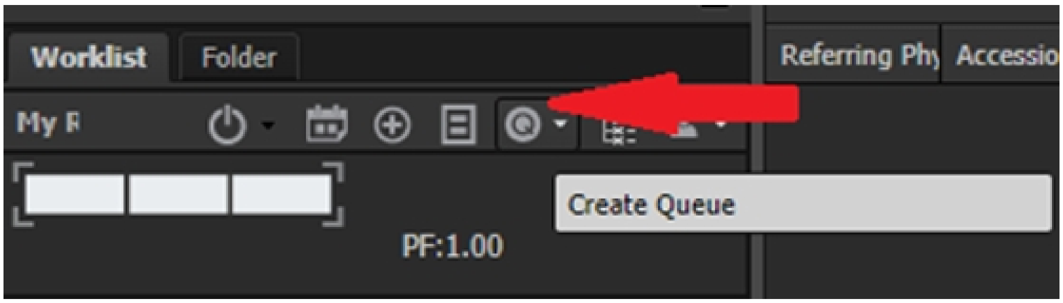
3. The changed worklist order will now take precedence over the default worklist order based on shift. This worklist order will not be saved automatically. You will see the default worklist order the next time you log on.

Manually Creating the My Reading Queue

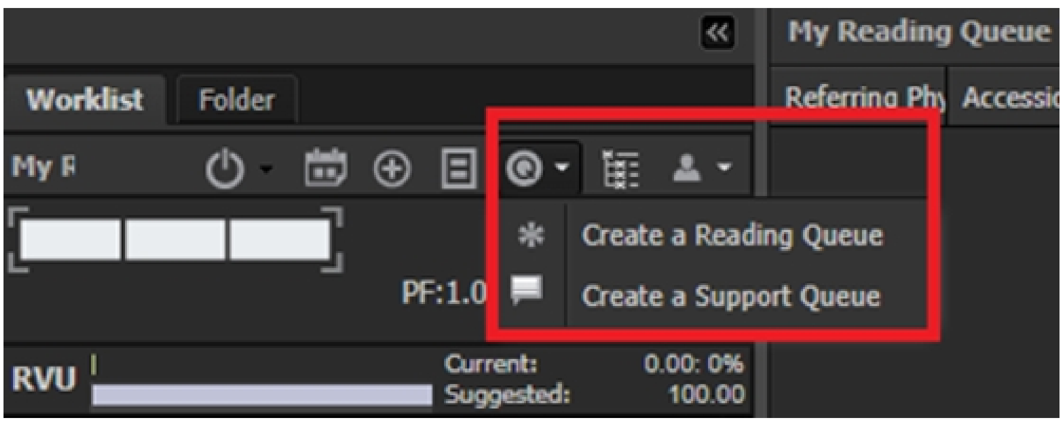
If your group is not using a shift-based workflow and you have the permissions, you can create your My Reading Queue manually.

To manually create your My Reading Queue:

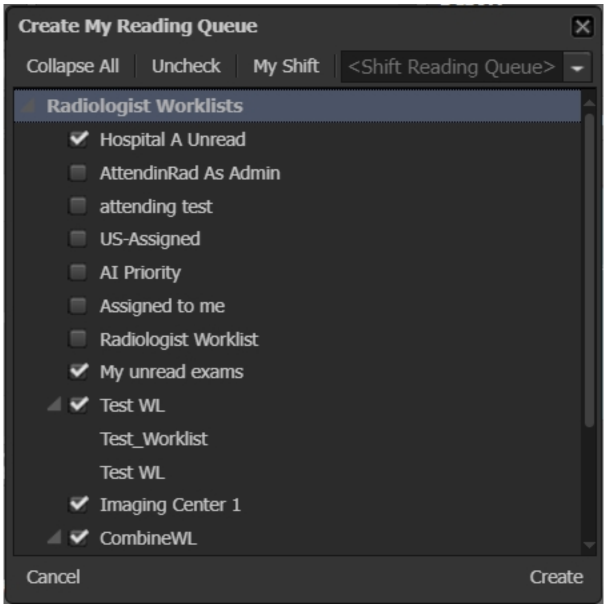
1. In the Worklist column, click the **Create Queue** icon.



2. Select the **Create a Reading Queue** from the drop-down menu.



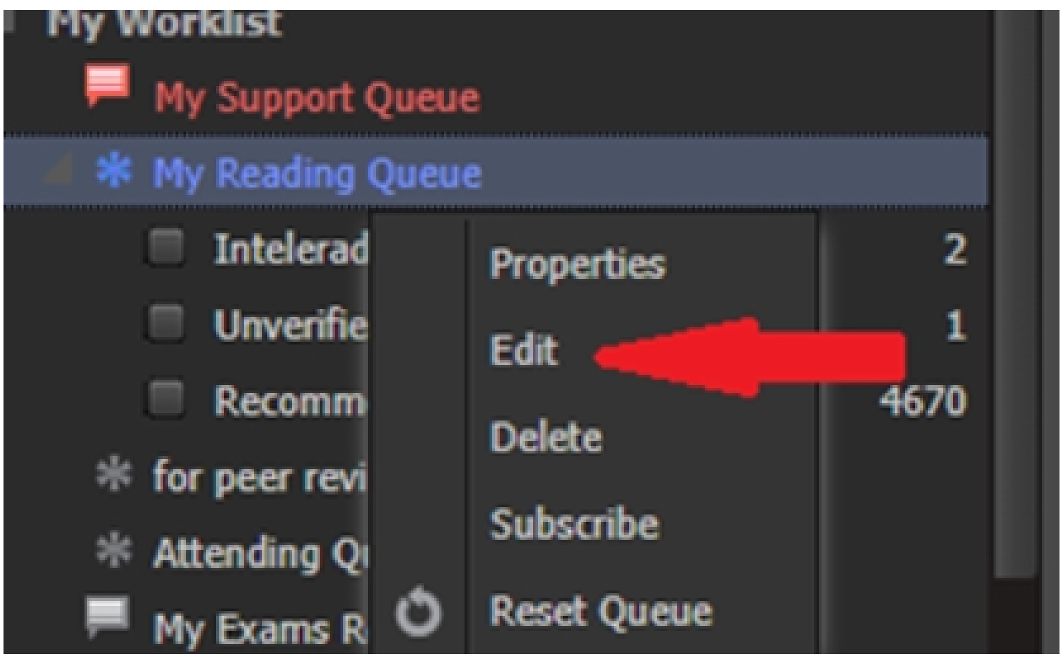
3. Select the worklists that you would like to add to My Reading Queue.



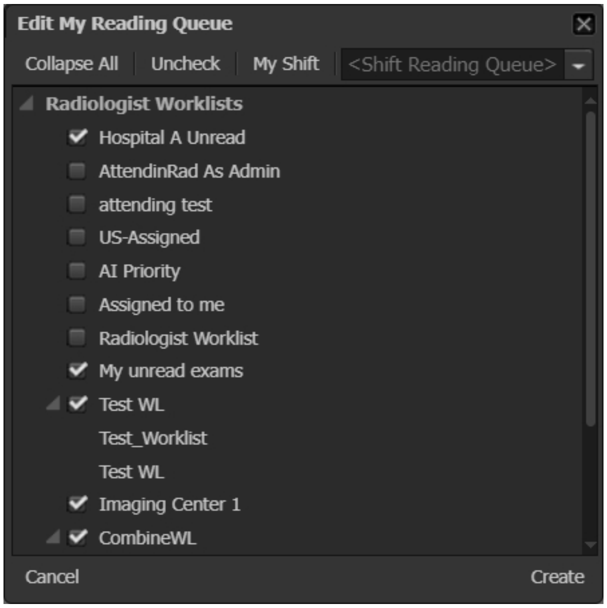
4. Click **Create**.

To edit My Reading Queue after it is created manually:

1. Right-click **My Reading Queue**.
2. Select Edit from the drop-down menu.



3. Make the desired changes to My Reading Queue.



4. Click **Create**.

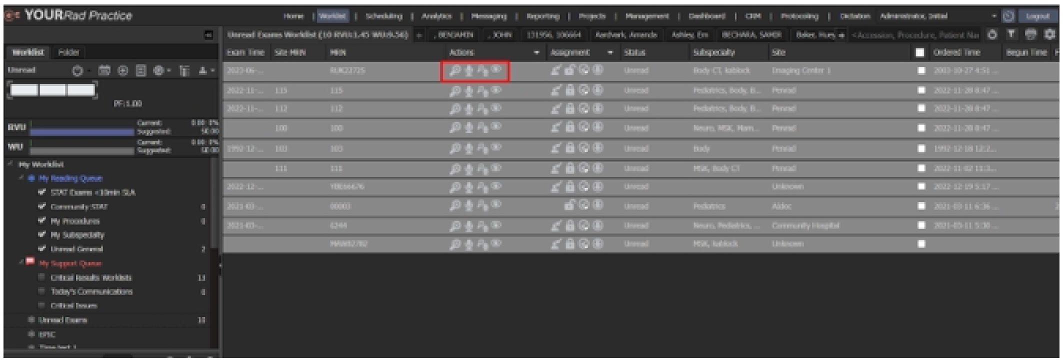
Opening Exams

You can open an exam from the Worklist area. You can choose to open the exam for dictation only, to view exam images only, or both.

You can use Auto-Next to automatically launch the next exam in your worklist when you finish dictating an exam. The exam will open in view and dictation mode. See "Using Auto-Next" (page 99).

To open an exam:

1. Access the desired worklist.
2. In the worklist area, find the exam you want to view and do one of the following:
    - In the Action Column for the required exam, you can single click on any of the below icons.



  - Click to open the exam for dictation mode only
  - Click to view the images only (view mode)
  - Click for both dictation mode and view mode.
  - Click to hide the exam from launching auto next. It acts as a way to pre-skip exams before you start auto next.
- If you do not want to use one of the single click actions icons, you can Double-click the exam to launch in dictation and view mode.

Managing Exam Assignments

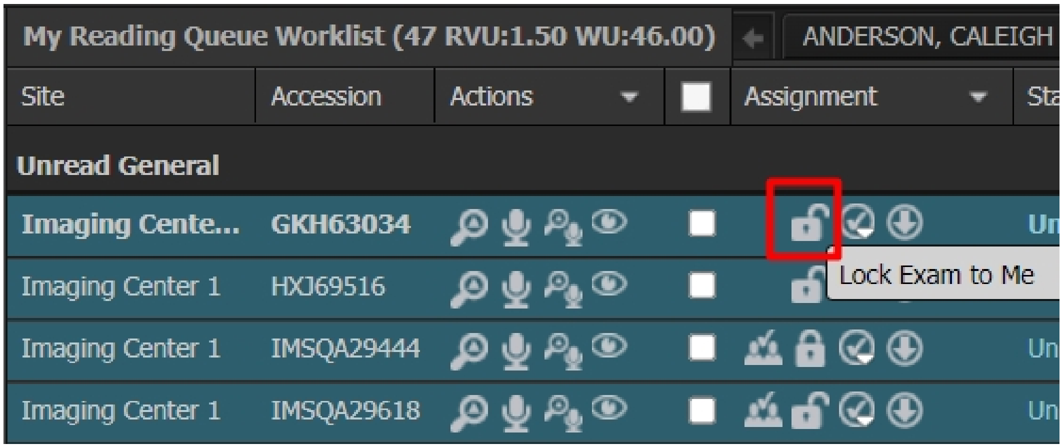
If you have the permissions to do so, you can assign exams to yourself or other users and groups in InteleOrchestrator.

When you assign an exam to yourself, you are locking it for yourself. Depending on how your group worklists are configured, this may remove that exam from everyone else's worklist.

To assign an exam to yourself:

- In the Assignment column of the worklist, click the padlock icon for the exam you want to assign to yourself.

  Starting in InteleOrchestrator version 4.5, when you perform an Assign/Unassign, Lock/Unlock, or Subscribe action on an exam that has been combined with other exams, that action will also apply to all exams within the combination group.

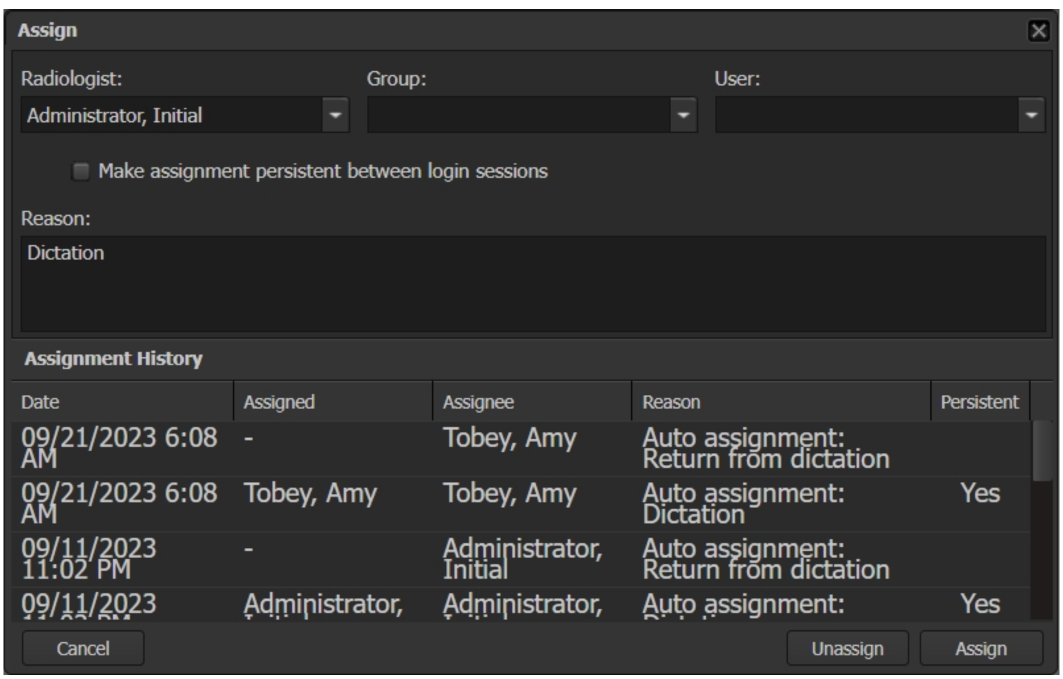


You can unassign an exam that is assigned to you by clicking the padlock icon again.

To assign an exam to someone else:

1. In the Assignment column of the worklist, click the Assign/Lock icon.
2. In the Assign dialog, select a **Radiologist**, **Group**, or **User** to assign the exam to.

   This dialog also shows the assignment history for the exam.



3. If required, enter the reason you're assigning the exam.
4. Click **Assign**.

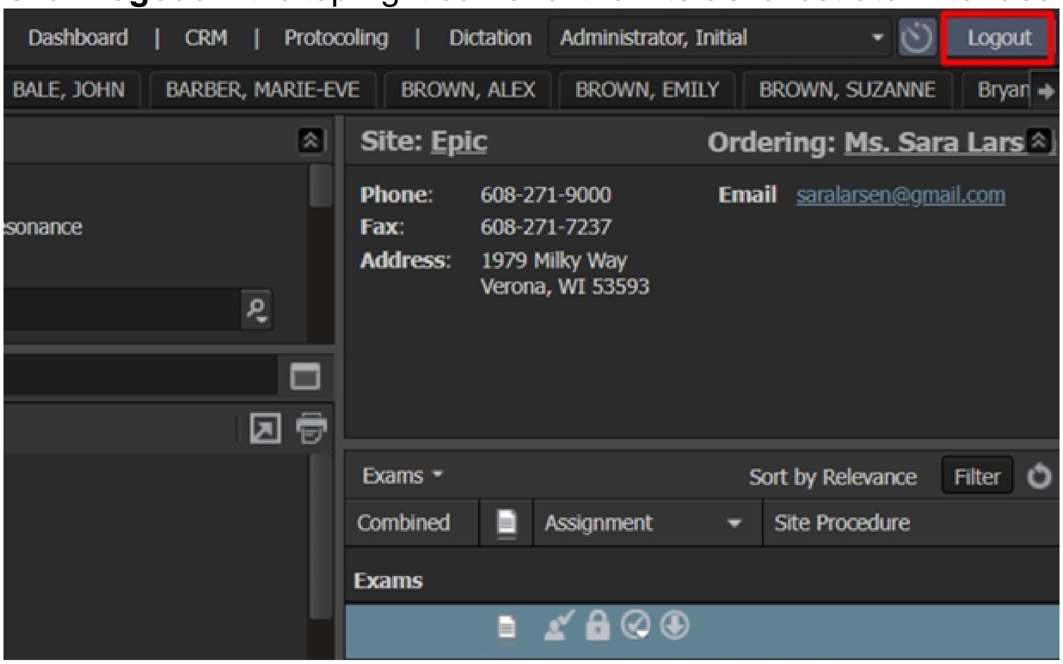
Starting in InteleOrchestrator version 4.5, when you perform an Assign/Unassign, Lock/Unlock, or Subscribe action on an exam that has been combined with other exams, that action will also apply to all exams within the combination group.

Managing Exams Assigned to You when Logging Out

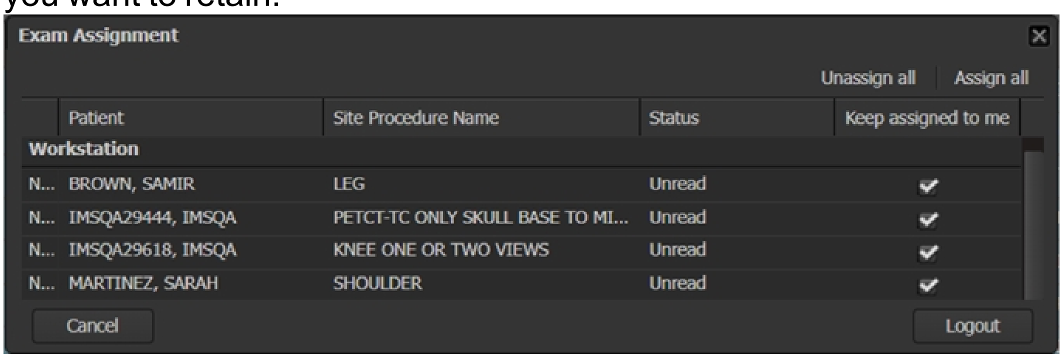
If you log out of InteleOrchestrator while you have exams still assigned to you, the Exam Assignment dialog will be displayed, prompting you to either keep your assigned exams or release your assigned exams back to the reading queue. The released exams can then be reassigned to other Radiologists.

To keep your exams assigned to you when you log out:

1. Click **Logout** in the top-right corner of the InteleOrchestrator interface.



2. In the **Exam Assignment** dialog, leave the check-marks enabled next to the exams you want to retain.



3. At the bottom of the Exam Assignment dialog, click **Logout**.

To release some of your exams to the reading queue when you log out:

1. Click **Logout** in the top-right corner of the InteleOrchestrator interface.
2. In the Exam Assignment dialog, deselect the check-marks next to the exams you want to return to the reading queue.
3. At the bottom of the Exam Assignment dialog, click **Logout**.

To release all of your exams to the reading queue when you log out:

1. Click **Logout** in the top-right corner of the InteleOrchestrator interface.
2. At the top of the Exam Assignment dialog, click **Unassign All**.
3. At the bottom of the Exam Assignment dialog, click **Logout**.

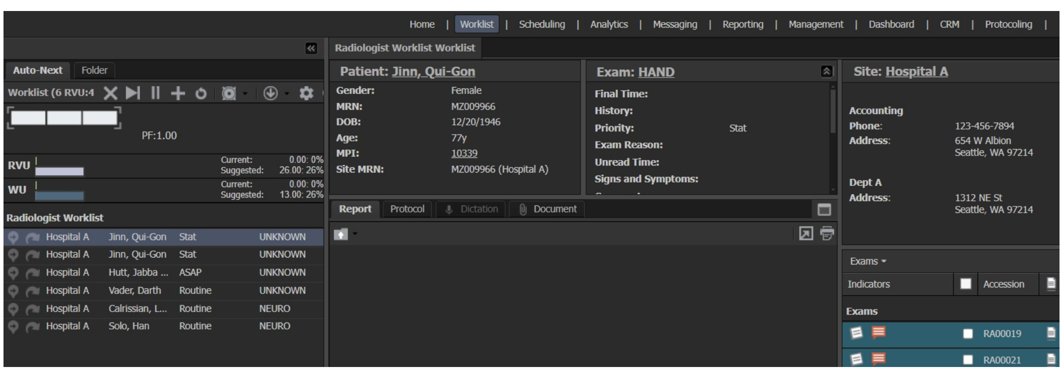
Using Auto-Next

InteleOrchestrator uses your practice's business logic to distribute exams to radiologists, based on their roles and specialties, prioritizing those exams for each user. The Auto-Next feature allows you to save time by automatically launching the next exam on your worklist when you finish dictating an exam.

To start Auto-Next:

- Click the Auto-Next icon above My Reading Queue.

  This immediately launches the first exam on your worklist in your dictation and viewer applications. A mini version of your worklist, your Auto-Next queue, appears in the Worklist tab and the Patient View window for the current patient. For more details on the Patient View, see "Understanding the Patient View" (page 25).



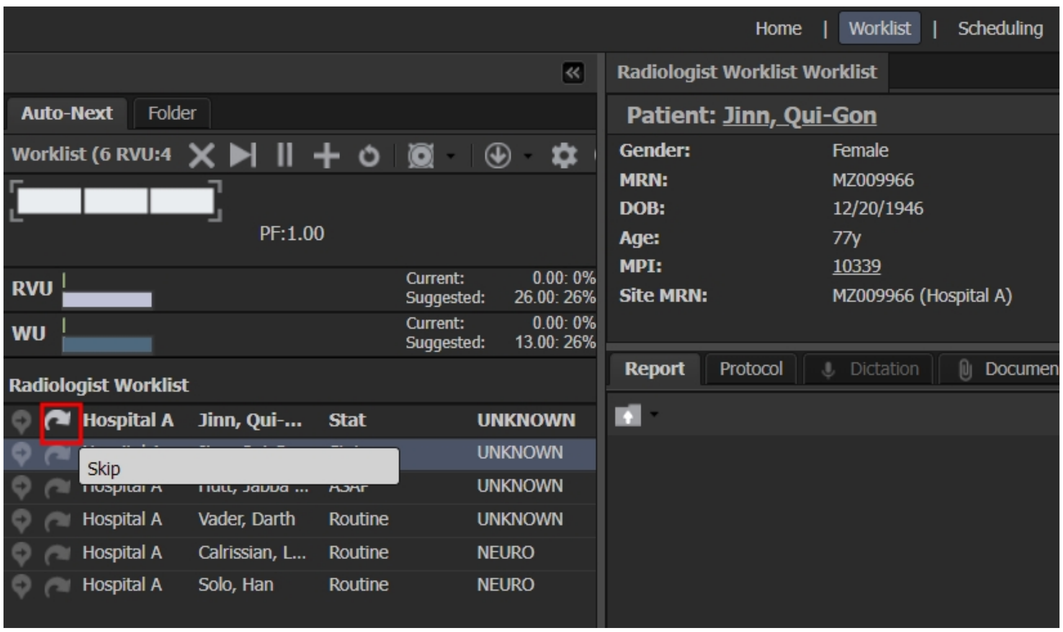
  As soon as you sign the dictation for the current exam, the next exam in your auto-next queue opens.

To skip exams in your Auto-Next queue:

The radiologist can temporarily skip exams in the queue based on urgency or their preference not to report them. Radiologists may prioritize certain types of exams based on factors such as the complexity of the study, the need for consultation, or technical issues.

1. In the Worklist tab, select the exam you want to skip in your Auto-Next queue.
2. Click the Skip icon for that exam. The exam will still appear in your Auto-Next queue, but Auto-Next will not open it for you.

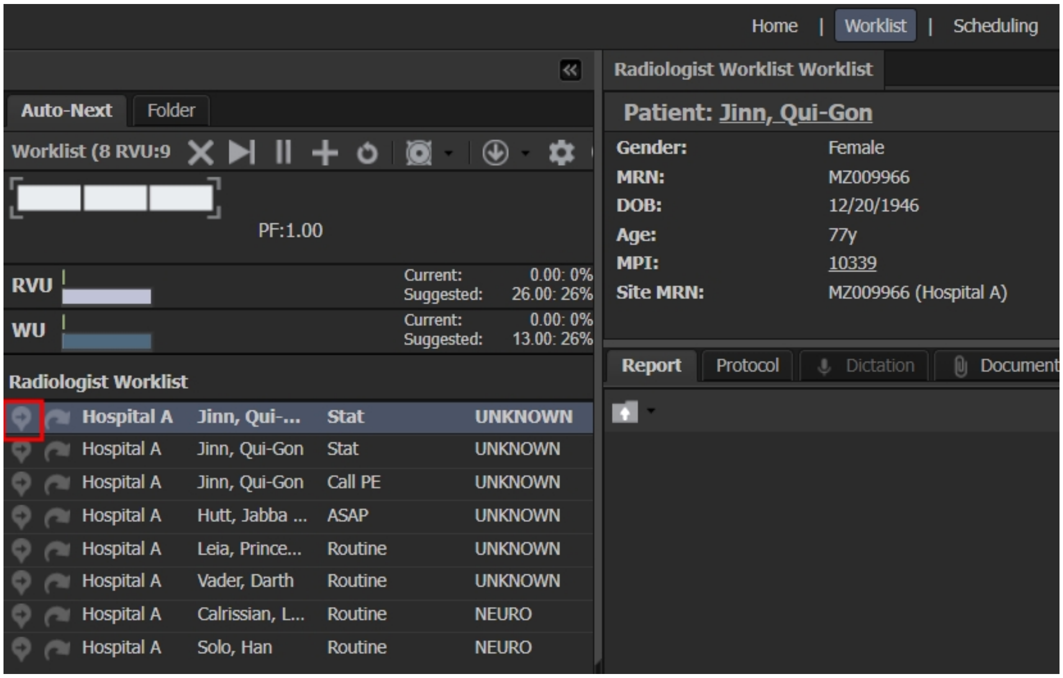
   To return to the exam or "unskip" it, click the Skip icon again.



To set an exam to be next in your Auto-Next queue:

In situations where a radiologist receives a call from a referring provider requesting an urgent review or if a technologist asks them to prioritize an exam, marking it as 'Next' automatically moves urgent or critical exams to the top of the worklist. The case that is marked as “Next” will launch as soon as the radiologist is finished with their current exam.

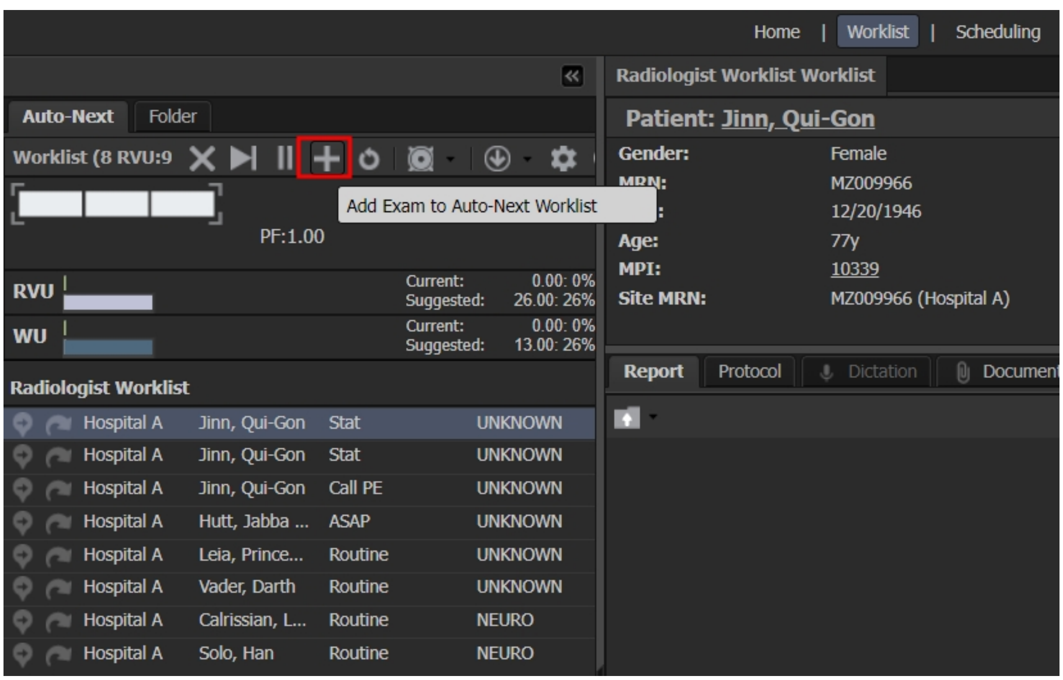
1. In the Worklist tab, select the exam you want to read next in your Auto-Next queue.
2. Click the Next icon for that exam. When you indicate that an exam should be next, that exam is assigned/locked to you and will load as soon as you finish dictating the current exam.



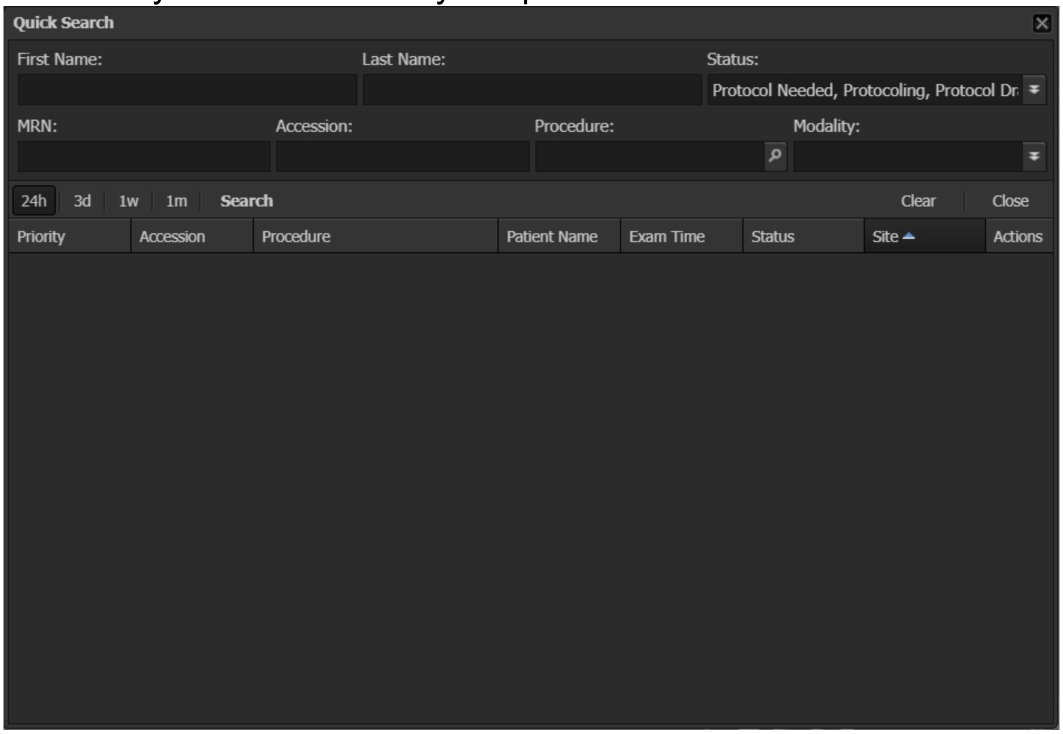
To add an exam to your Auto-Next queue:

If you want to read an exam that does not appear in the Auto-Next queue, you can add that exam to the queue.

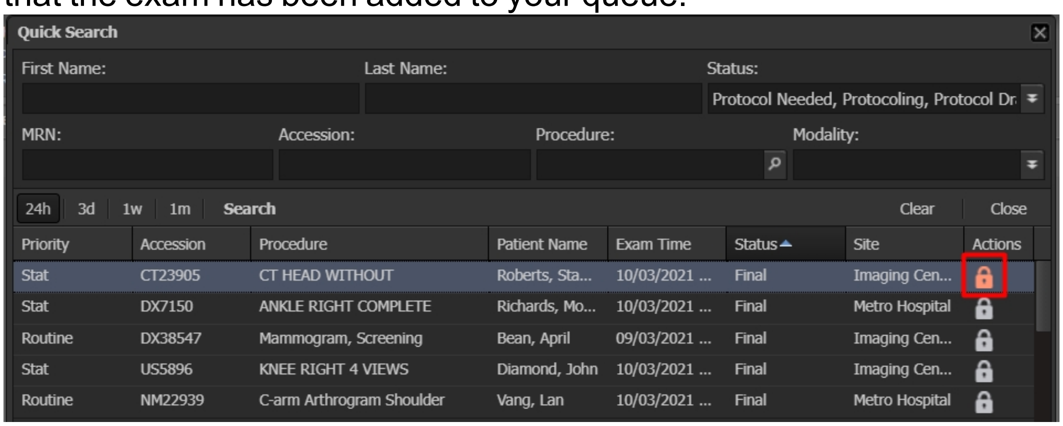
1. In the Worklist tab, click the Add ➕ icon in the Auto-Next toolbar.



2. A new Quick Search window will appear on your screen, where you can search for the exam you want to add to your queue.



3. Search for the exam according to the fields and click the **Search** button.
4. Exams will appear in the search results. Click the lock icon to assign the exam to yourself.
5. After making your selection, the lock icon you clicked will turn orange to indicate that the exam has been added to your queue.

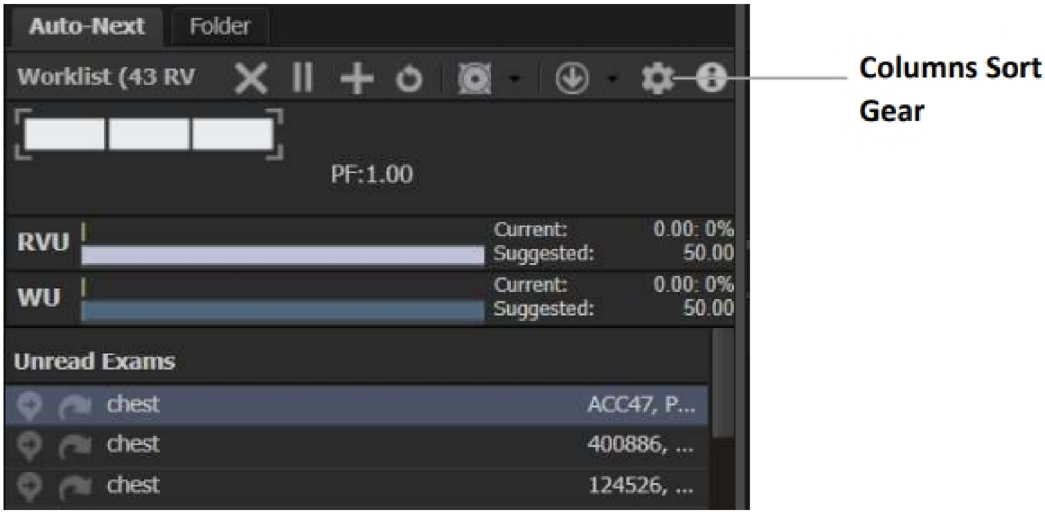


6. To close the window, click on the '**x**' button located in the upper-right corner of the pop-out window.

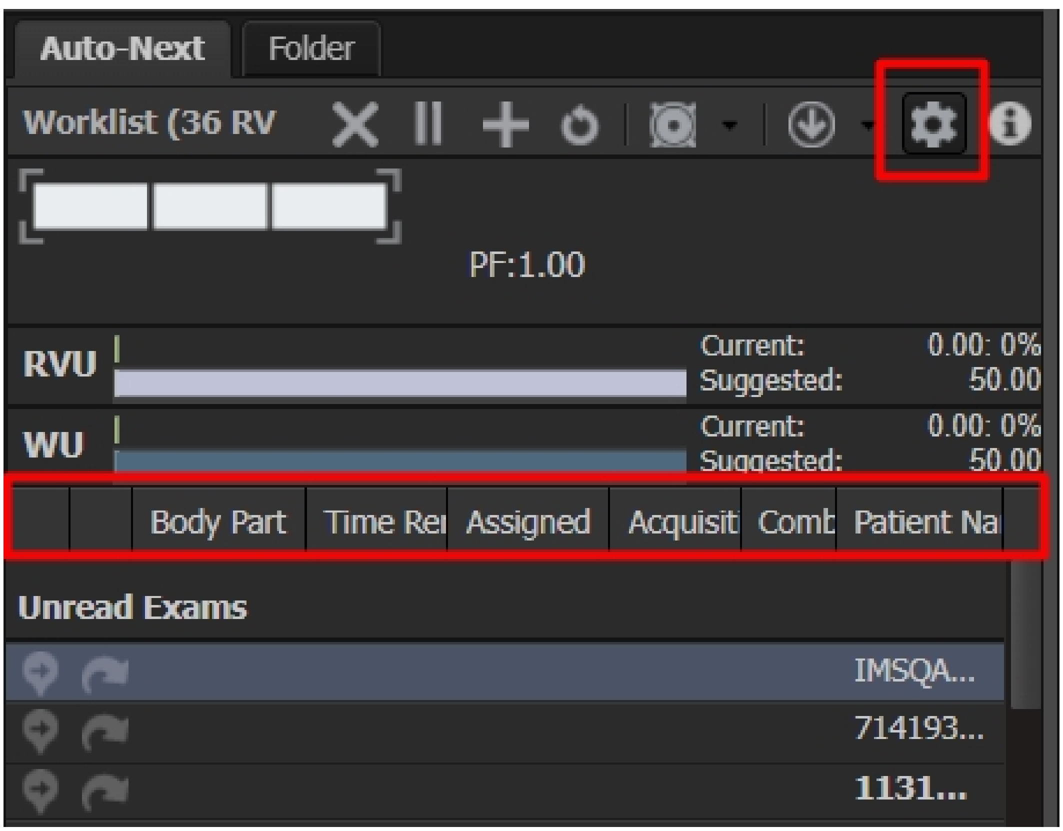
To rearrange your Auto-Next columns:

Your InteleOrchestrator system administrator enables the columns in Auto-Next, but you can rearrange them as required.

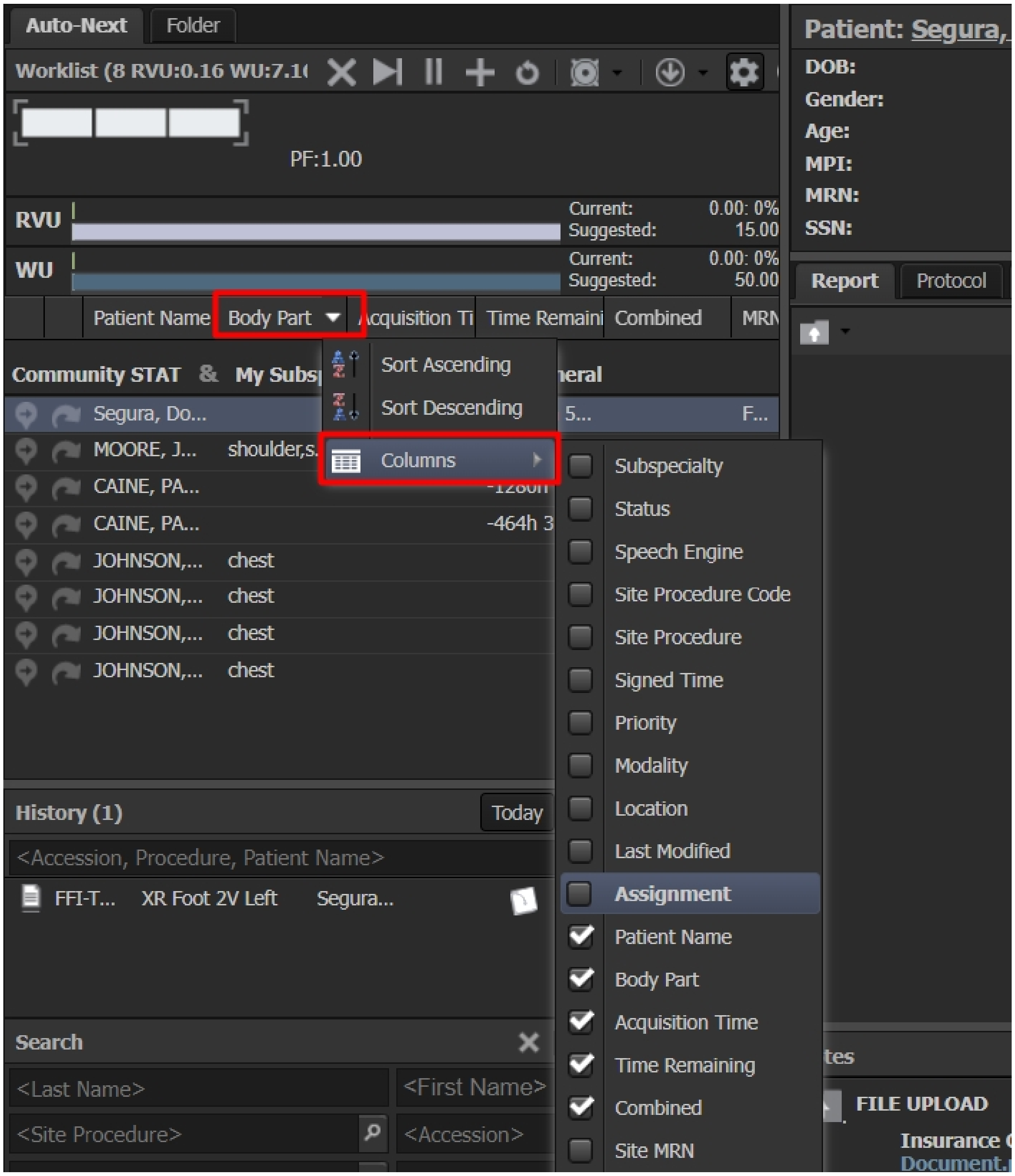
1. Click the gear icon above your Auto-Next queue.



2. Once you click the gear icon, all the column headers for Auto-Next will appear.



3. Click the drop-down arrow on one of the columns and then click **Columns**.

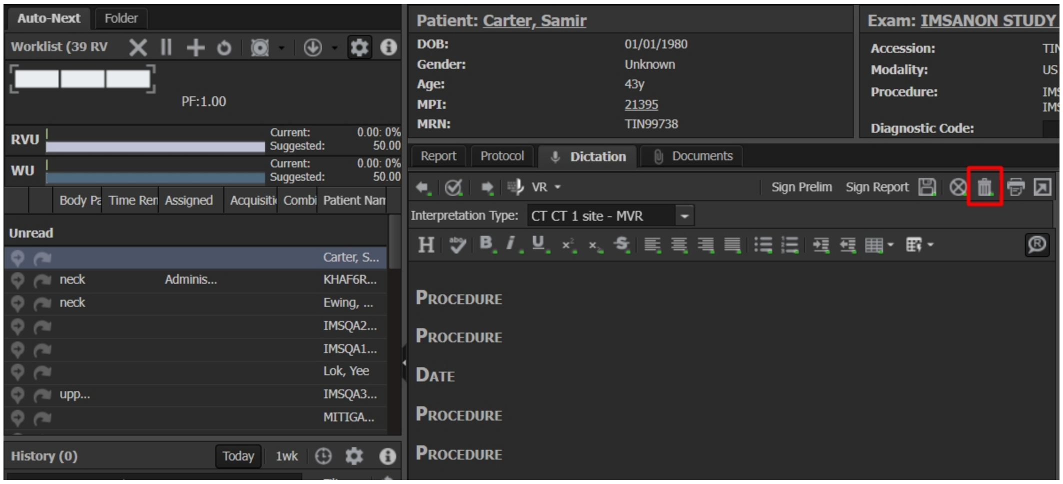


4. Enable or disable a column type to show or hide the column, respectively.
5. Click and drag a column to its new position.

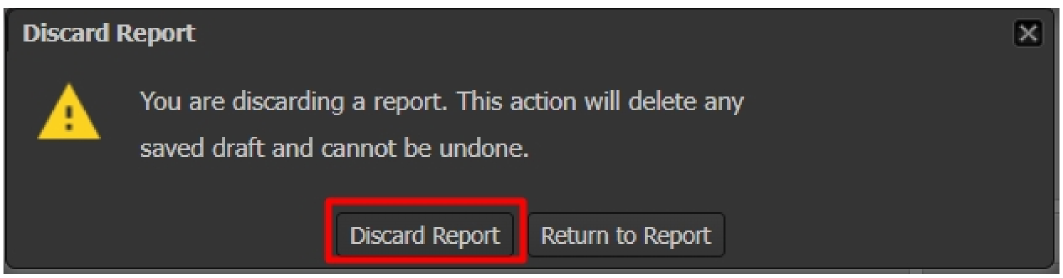
To exit Auto-Next:

When you exit Auto-Next, the main worklist page appears and none of your skipped exams are retained. If you pause Auto-Next, the main worklist appears and your skipped exams are retained for you when you resume Auto-Next.

1. Discard the exam that you are currently reading in your dictation system.

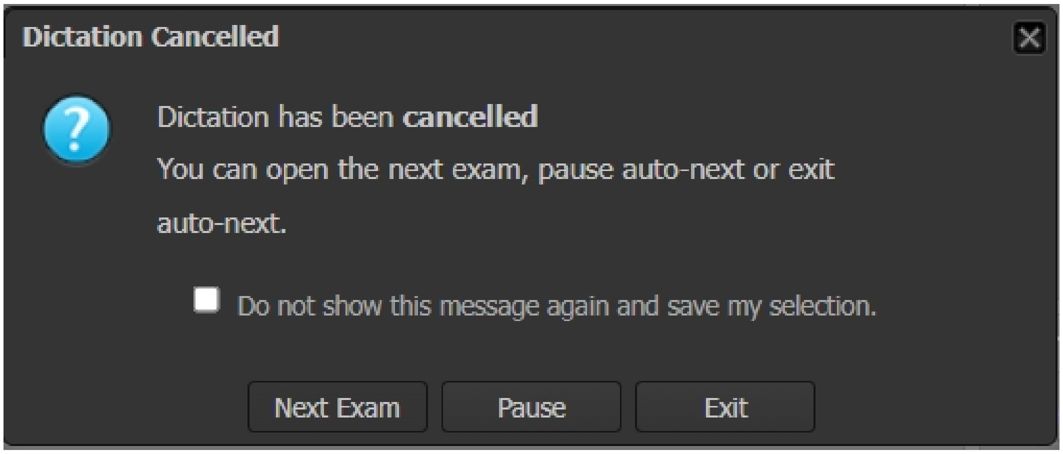


2. In the Discard Report dialog, click **Discard Report**.



3. In the Dictation Cancelled dialog, select whether you want to move to the next exam in your queue, pause Auto-Next, or Exit Auto-Next. Click one of the following:
   - **Next Exam**: discards the current exam and moves to the next exam in your Auto-Next queue.
   - **Pause:** Pauses Auto-Next, leaving the current report open on your screen.
   - **Exit:** Exits Auto-Next and returns you to your My Reading Queue.

You can exit or pause Auto-Next by clicking the or button above your Auto-Next queue.



Using the Auto-Next Optimizer

You can set your Auto-Next queue to prioritize and automatically launch exams based on modality, body part, or application.

For example, if you prioritize by modality and you are currently reading a CT exam, Auto-Next launches the next CT exam in your worklist.

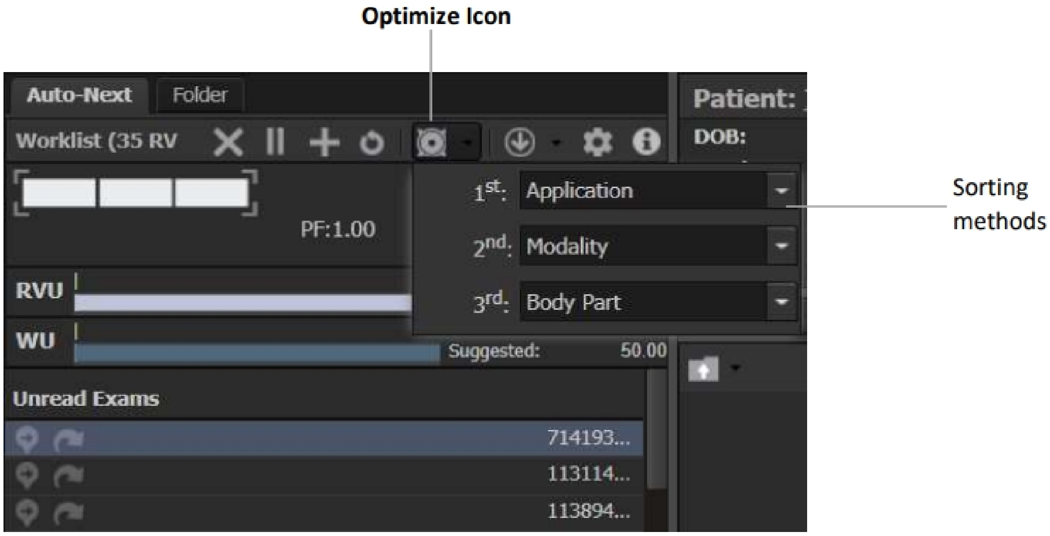
The feature does not re-sort your Auto-Next queue, it simply launches the next exam based on the efficiency settings you selected.

Optimizing by application applies only if your group uses multiple dictation systems or image viewers. For example, if you launch InteleViewer for some exams and Fuji for other exams, Auto-Next launches all InteleViewer exams before launching any Fuji exams.

STAT exams override any optimization settings that you have enabled.

To set and enable Auto-Next optimizer:

1. In the Auto-Next toolbar, click the drop-down menu next to the Optimize Efficiency icon.



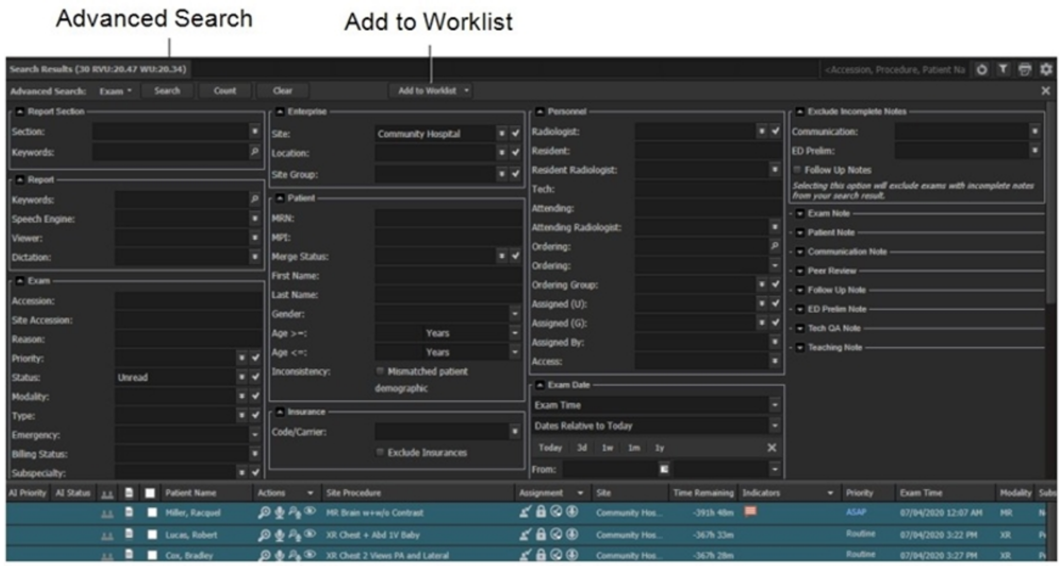
2. Choose an optimization method:
   - By one sorting method only: Select the sorting method (Modality, Body Part, Application) in all three sorting options.
   - By multiple sorting methods: Select the sorting method to apply first in the **1st:** sorting option, and the second sorting method to apply as the **2nd:** sorting option, and the third sorting method as the **3rd:** sorting option. For example, sorting by Application, Modality, then by Body Part.
3. Click the Optimize Efficiency icon to enable the optimizer. This icon turns green to when Auto-Next Optimizer is enabled.

Creating Your Own Worklist

If you have the permissions to do so, you can create your own worklist. Worklists that you create appear for you only.

To create your own worklist:

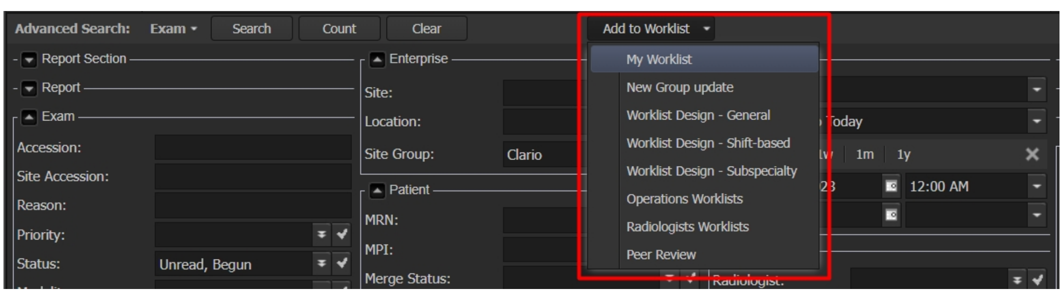
1. Click the Advanced Search icon.



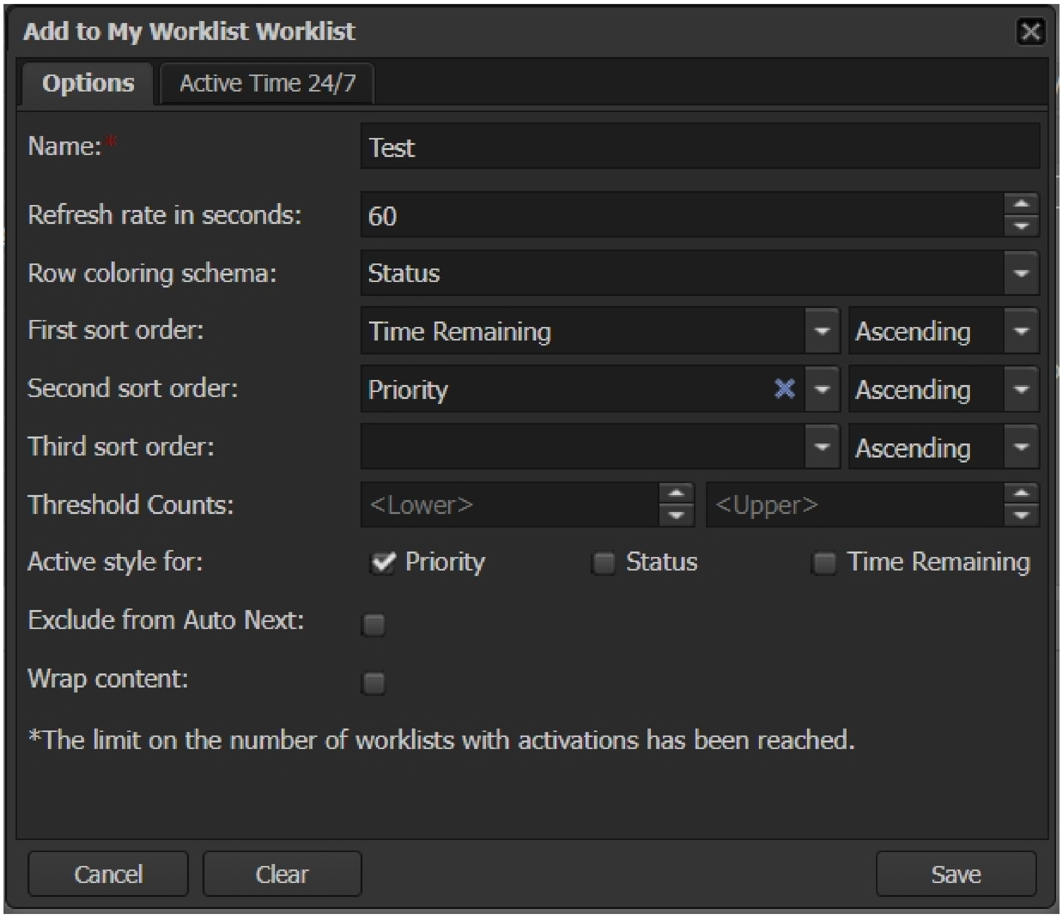
2. Enter search criteria for the exams you want to add to this worklist. For example, if you want to find all unread exams from Community Hospital, select Community Hospital in the **Site** field and Unread in the **Status** field.
3. Click **Search**.

   If you do not see the **Add to Worklist** button now, you do not have permission to create your own worklist.

4. Click **Add to Worklist** and then select **My Worklist** from the list.



5. In the Worklist Properties dialog, enter a **Name** for the worklist, and then select any other desired properties.



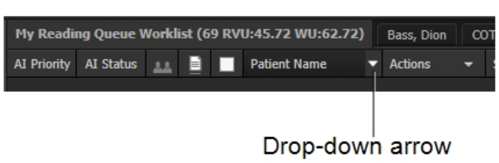
6. Click **Save**. The worklist appears under **My Worklists** in the Worklist tab.

Customizing the Work Area with Worklists

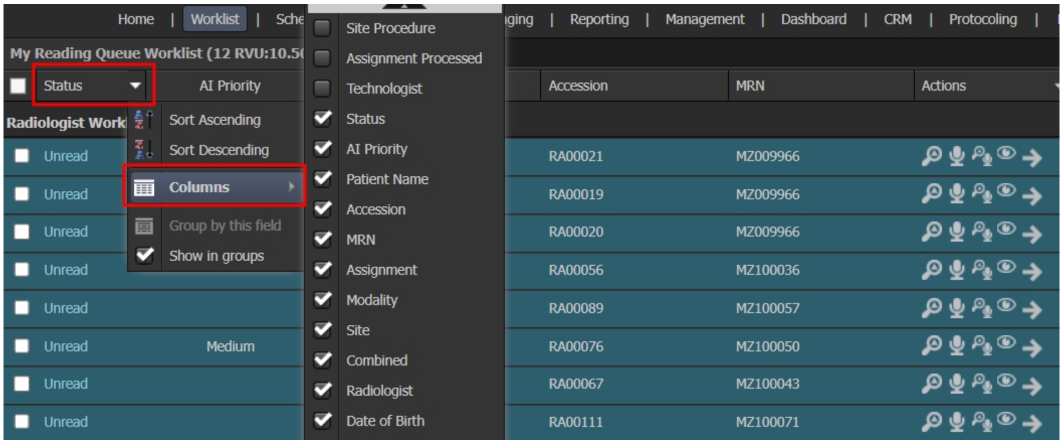
You can customize the columns for the worklists in the work area and resize some of the sections. The changes that you make apply to all your worklists.

To add or exclude columns in your worklist:

1. Ensure that a worklist is currently displayed.
2. Click the drop-down arrow on one of the columns and then click **Columns**.



3. Enable or disable a column type to show or hide the column, respectively.



4. Click **Logout** to save your changes.

Your changes will persist during the current session but will not reappear unless you log out from InteleOrchestrator by using the Logout button. Clicking the (**x**) on your browser will close InteleOrchestrator without saving your changes

To reorder the columns in your worklist:

1. Ensure that a worklist is currently displayed.
2. Click and drag a column to the desired location.
3. Click **Logout** to save your changes.

Your changes will persist during the current session but will not reappear unless you log out from InteleOrchestrator by using the Logout button. Clicking the (**x**) on your browser will close InteleOrchestrator without saving your changes

To change the width of columns in your worklist:

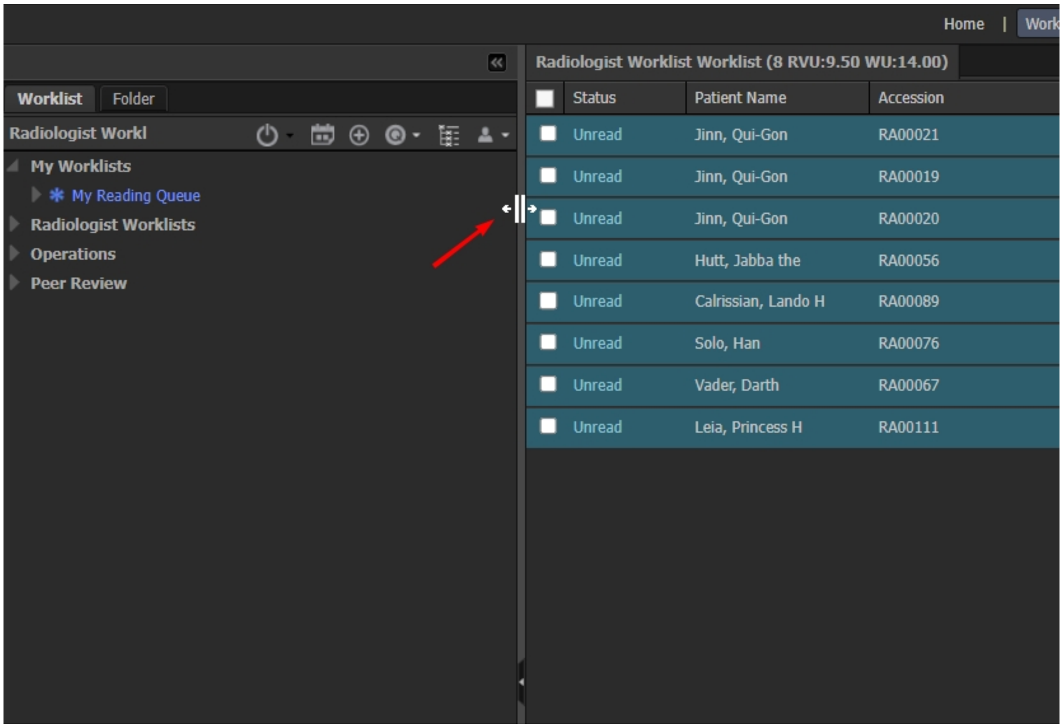
1. Ensure that a worklist is currently displayed.
2. Hover the mouse over a column border until your mouse pointer changes to a dual arrow.
3. Click and drag the column to the desired width.
4. Click **Logout** to save your changes.

Your changes will persist during the current session but will not reappear unless you log out from InteleOrchestrator by using the Logout button. Clicking the (**x**) on your browser will close InteleOrchestrator without saving your changes

You can double-click the column to resize it to the maximum width of the contents of the column.

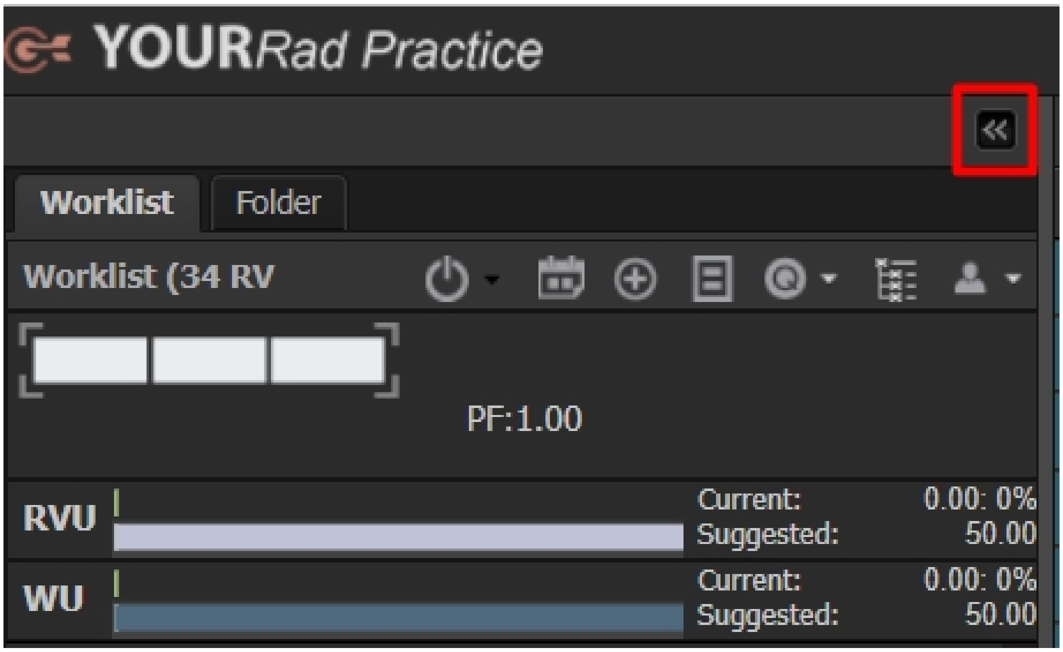
To resize the worklist panel:

1. Place the cursor on the worklist column boundary, that you wish to resize, until the cursor changes to ⇹.



2. Click and drag the boundary to increase or decrease the width of the worklist column.

   You can also click the double arrows « at the top of the worklist menu to completely collapse the worklist panel. Click the double arrows again to expand the worklist panel.



3. Click **Logout** to save your changes.

Your changes will persist during the current session but will not reappear unless you log out from InteleOrchestrator by using the Logout button. Clicking the (**x**) on your browser will close InteleOrchestrator without saving your changes

Searching in InteleOrchestrator

There are four search methods in InteleOrchestrator, and the one you choose to use depends on the exam you want to search for. The following table explains each search functionality, when you would want to use it, and links to instructions for how to conduct each type.

Search Type	Reason for Use	Instructions
Quick Search	When you know the name, procedure, accession number, site, and/or MRN of an active exam you want to find.	"Quick Search" (page 113)
History Search	When you want to search for an exam you have recently opened or read.	"Searching in Exam History" (page 113)
Worklist Search	When you want to search for an exam that is in your worklist	"Searching In A Worklist" (page

Search Type	Reason for Use	Instructions
		115)
Advanced Search	When you want to search for an exam that is outside your worklist.	“Advanced Search" (page 116)

Quick Search

You can use the Quick Search to find an exam in your worklist with a few key pieces of data. The results of your search appear in the work area.

You can search for a partial string when using any of the search functions that are available in InteleOrchestrator. To do so, add an asterisk (*) to the end of the partial string. For example, to search for all patients with a last name that start with the letters “Clar”, enter “Clar*” in the last name search field.

To perform a quick search:

1. In the Search section of the worklist column, enter a patient's name (last and/or first), the procedure, the Accession number, the Site and/or the MRN. For information on where the Search section is, see “About the Worklist Column" (page 21).
2. Press **ENTER** or click the search  icon.

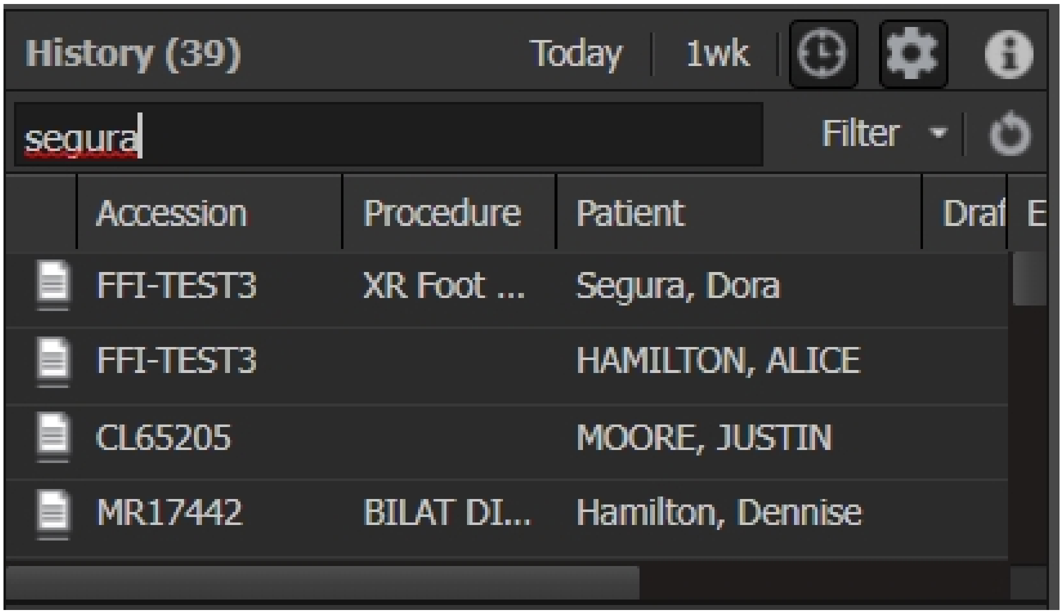
Searching in Exam History

You can search for an exam from the list of exams you have recently opened or read. The results of your search appear in the work area.

You can search for a partial string when using any of the search functions that are available in InteleOrchestrator. To do so, add an asterisk (*) to the end of the partial string. For example, to search for all patients with a last name that start with the letters “Clar”, enter “Clar*” in the last name search field.

To search in your History:

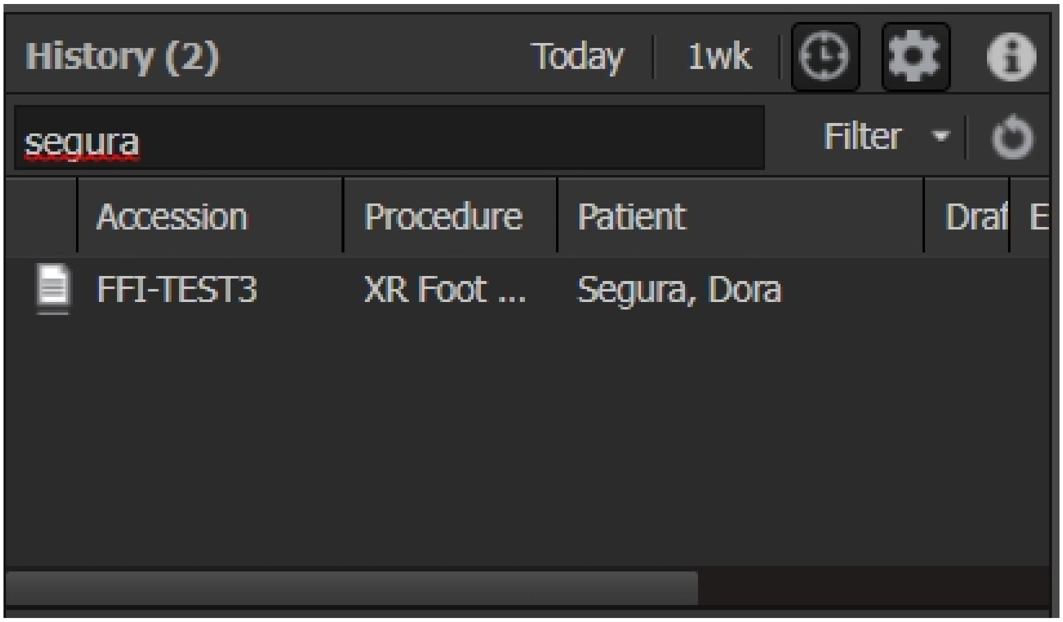
1. In the History section of the worklist column, enter a patient's name (last and/or first), the procedure, the Accession number, the Site and/or the MRN.



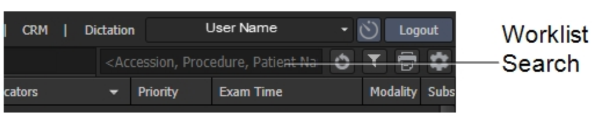
2. If needed, click Filter to enable additional filters.

   - Enable the **Needs Signature** check box to find exams you must sign.
   - Enable the **Waiting Communication** check box to find exams that contain a note that is waiting for some type of action.

3. Press **Enter**.



Searching In A Worklist

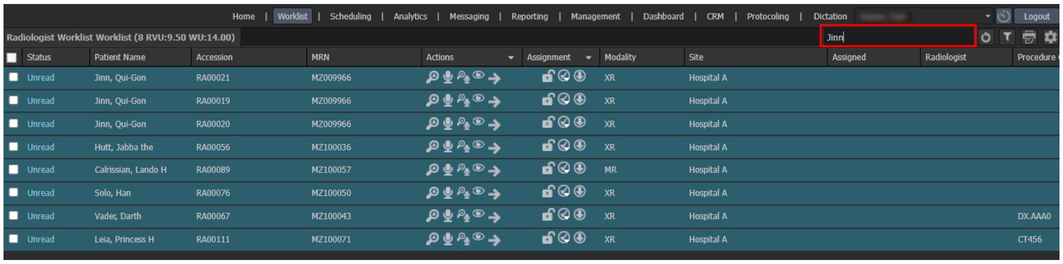


You can search for exams in the currently displayed worklist by using the Worklist Search. The results of your search appear in the work area.

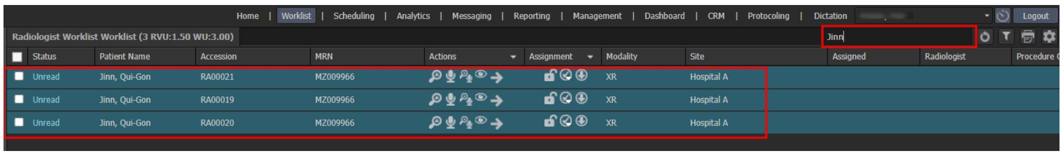
You can search for a partial string when using any of the search functions that are available in InteleOrchestrator. To do so, add an asterisk (*) to the end of the partial string. For example, to search for all patients with a last name that start with the letters “Clar”, enter “Clar*” in the last name search field.

To search for exams in the current worklist:

1. Ensure that a worklist is currently displayed.
2. In the Worklist Search field, enter the search criteria to search by accession, procedure, or patient name.



3. Press **ENTER**.



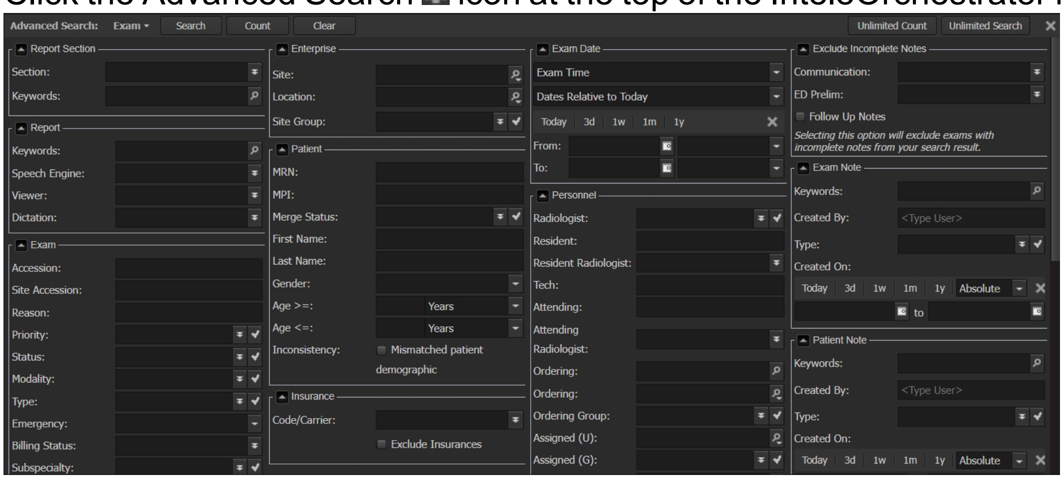
Advanced Search

You can perform an advanced search to find an exam outside your worklist or with advanced search criteria.

You can search for a partial string when using any of the search functions that are available in InteleOrchestrator. To do so, add an asterisk (*) to the end of the partial string. For example, to search for all patients with a last name that start with the letters "Clar", enter "Clar*" in the last name search field.

To perform an advanced search:

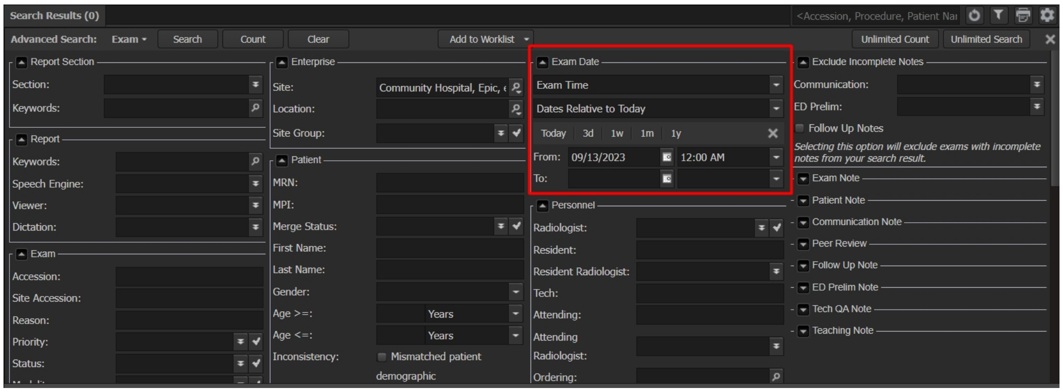
1. Click the Advanced Search icon at the top of the InteleOrchestrator interface.



2. In the Advanced Search dialog, enter the data you want to search for from the exams, such as Patient Note or Subspecialty.

If you do not add enough parameters to make a manageable search, InteleOrchestrator automatically limits the date range to within 3 days.

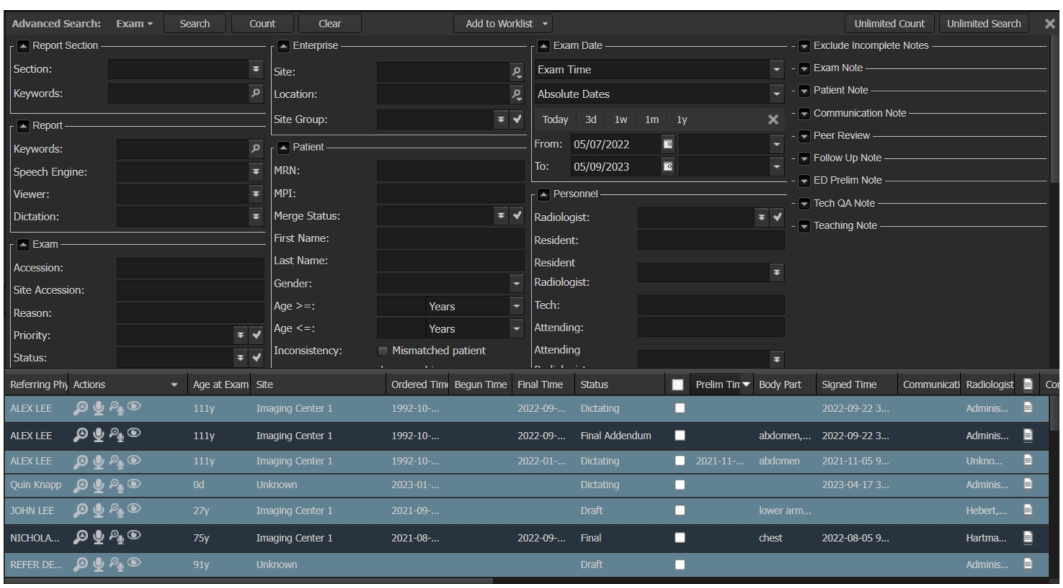
You can change the date range filters to search your data within a specified timeframe of your choosing. You can define a custom date range by choosing the start and end dates. Or, you can select from a list of predefined ranges, such as, Today, 3 days, 1 week, 1 month and 1 year.



3. Click **Search**.

You can click **Count** to see how many results your search criteria returned.

4. The results of your search appear in the work area.

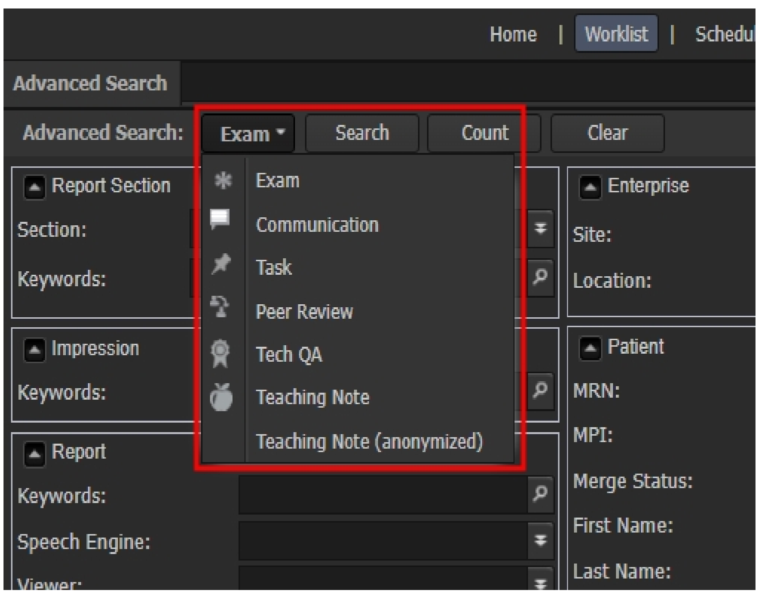


5. To minimize advanced search, click on the "**x**" below the gear.

Type of Advanced Searches:

There are different types of advanced searches. You can save worklists for all search types. The search type you use is dependent on what you are searching for and how you want your worklist to function.

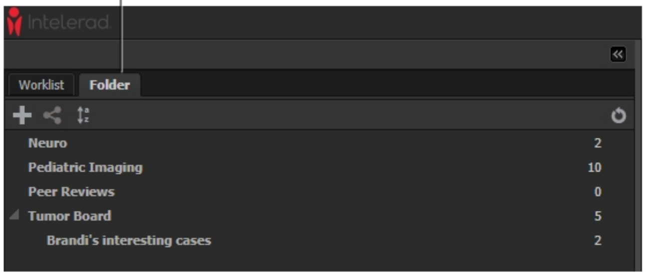
1. Exam - This search focuses on exam related search filters, such as subspecialty, priority, and status.
2. Communication - This search type searches for communication notes.
3. Task - This search type searches for task notes.
4. Peer Review - This search type searches for peer review notes.
5. Tech QA - This search type searches for tech QA notes.
6. Teaching Note - This search type searched for teaching notes.
7. Tech Note (anonymized) - This search type searches for teaching notes, but anonymizes the results.



Using Folders

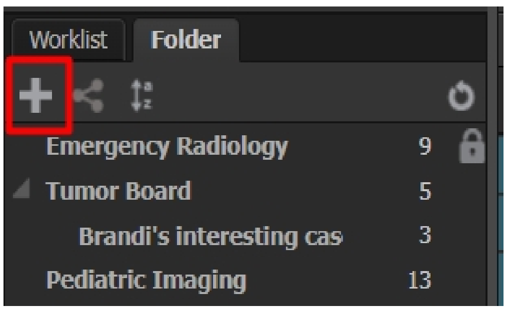
You can track exams in folders in InteleOrchestrator. This feature is commonly used to track interesting cases, cases for a tumor board, or cases for peer learning. The Folder tab is situated next to the Worklist tab.

Folder

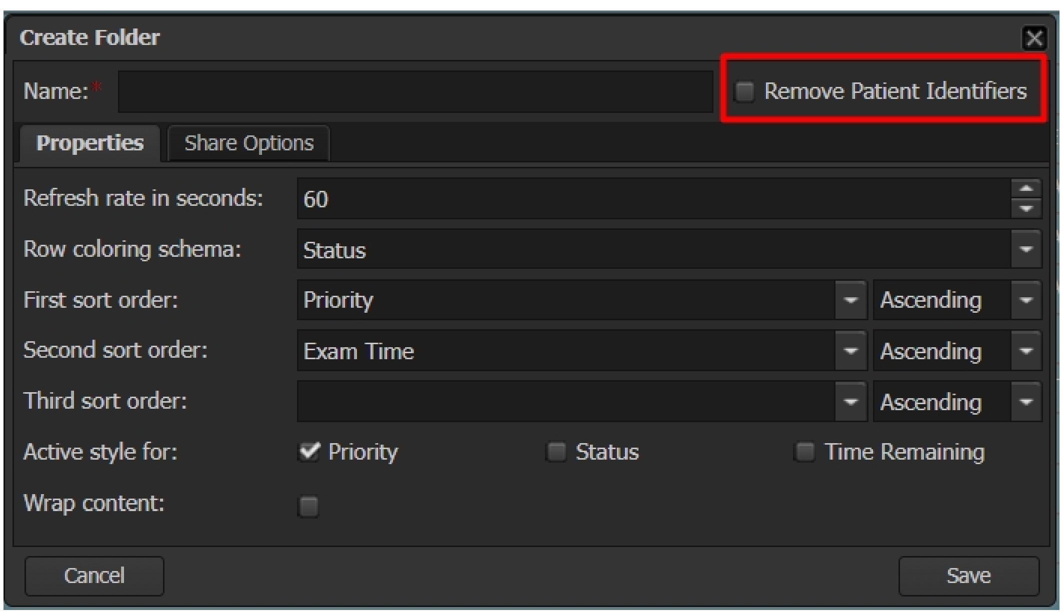


To create a folder:

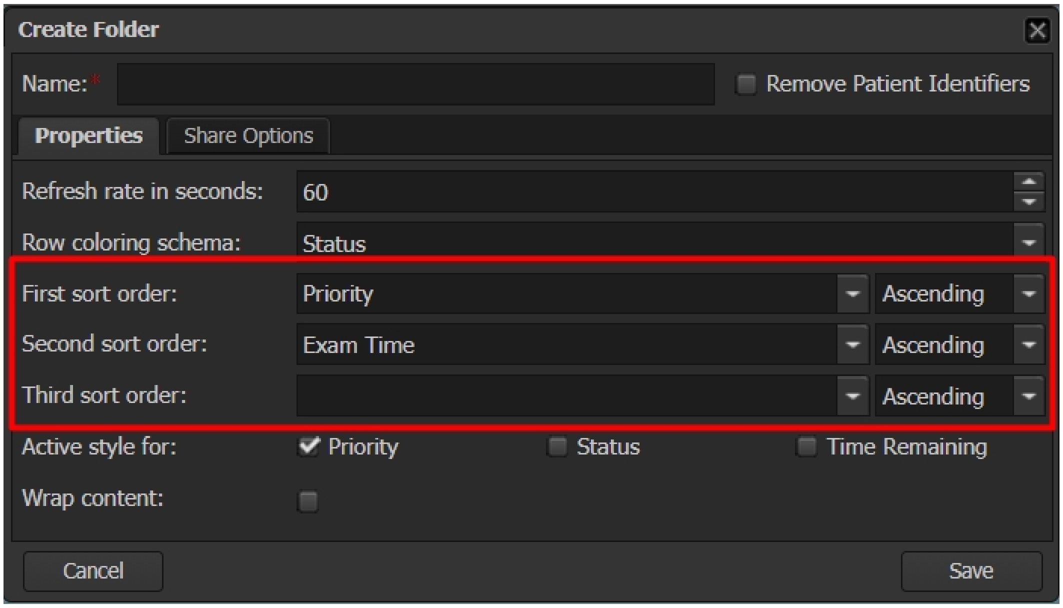
1. In the Worklist column, click the **Folder** tab.
2. Click the Add icon .



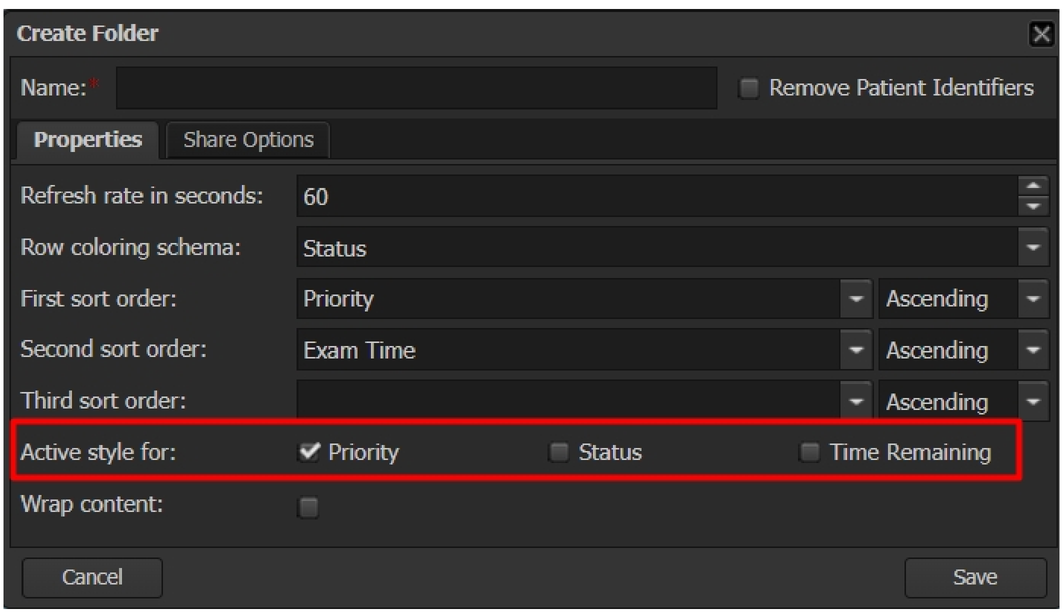
3. Enable the **Remove Patient Identifiers** check box if you need to share the contents of this folder with others.



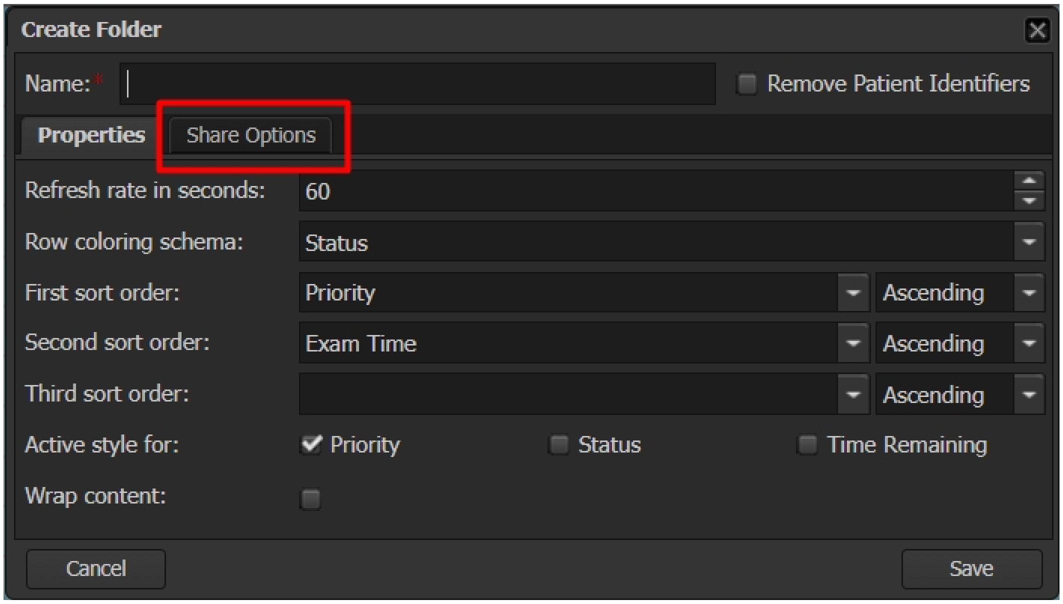
4. Select the sorting and appearance Properties for the exams in the folder, as needed.



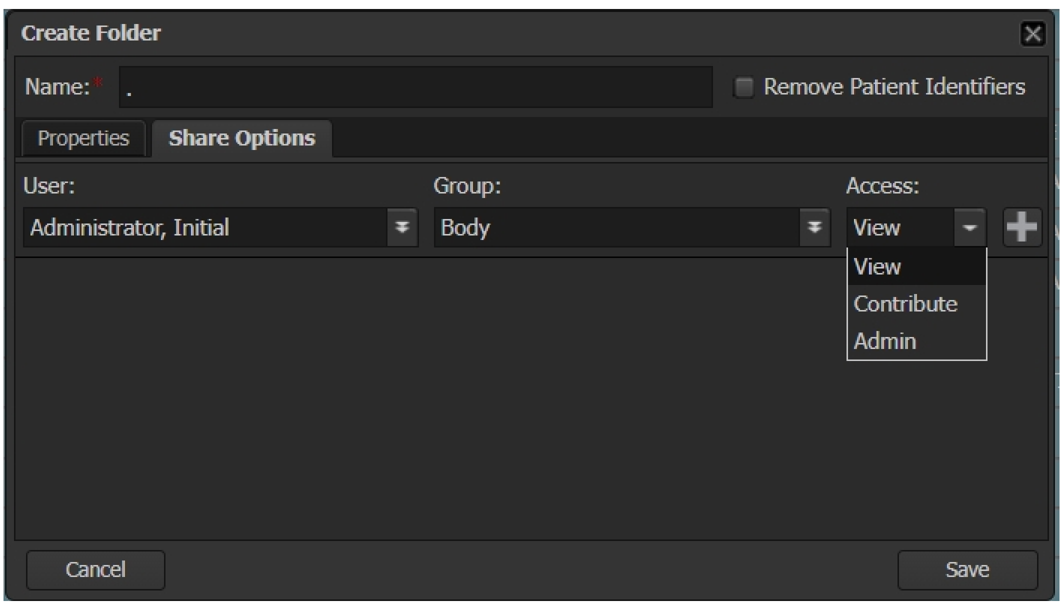
5. Apply the style formatting needed by enabling the **Priority**, **Status**, and/or **Time Remaining** check boxes.



6. If you need to share the contents of this folder with other users, click the **Share Options** tab.



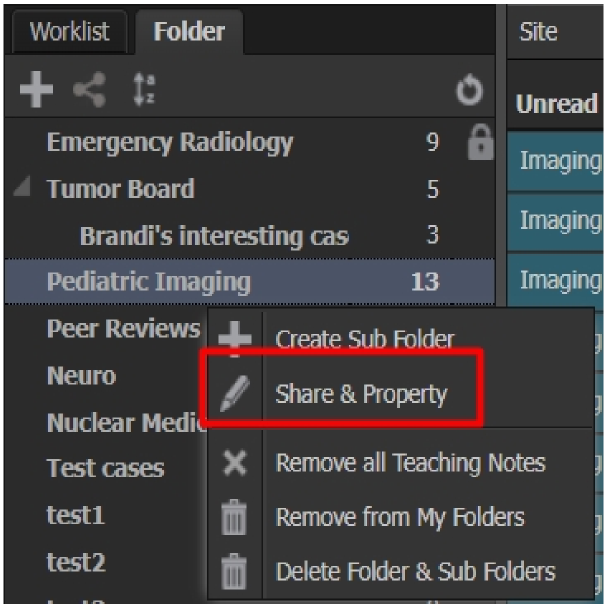
7. Select the level of access you to assign to these users.
   - **View**: users can see the folder and the cases in the folder.
   - **Contribute**: users can add cases to the folder.
   - **Admin**: users can add cases to the folder and edit any of the properties.



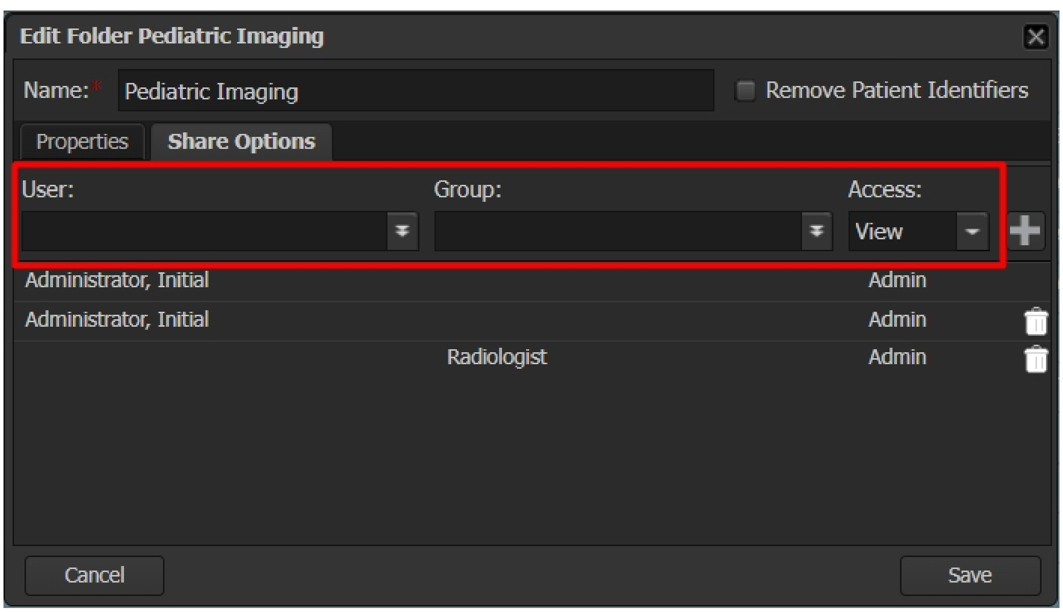
8. Click **Save**.

To share a folder:

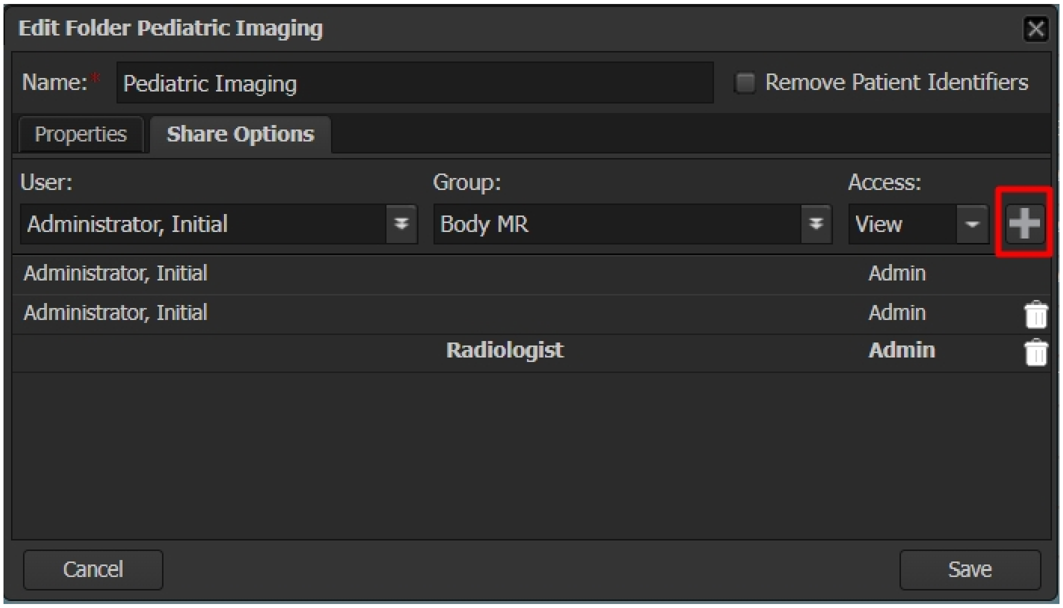
1. In the Worklist column, click the **Folder** tab.
2. In the list of folders, right-click the folder you want to share, and then click **Share & Property**.



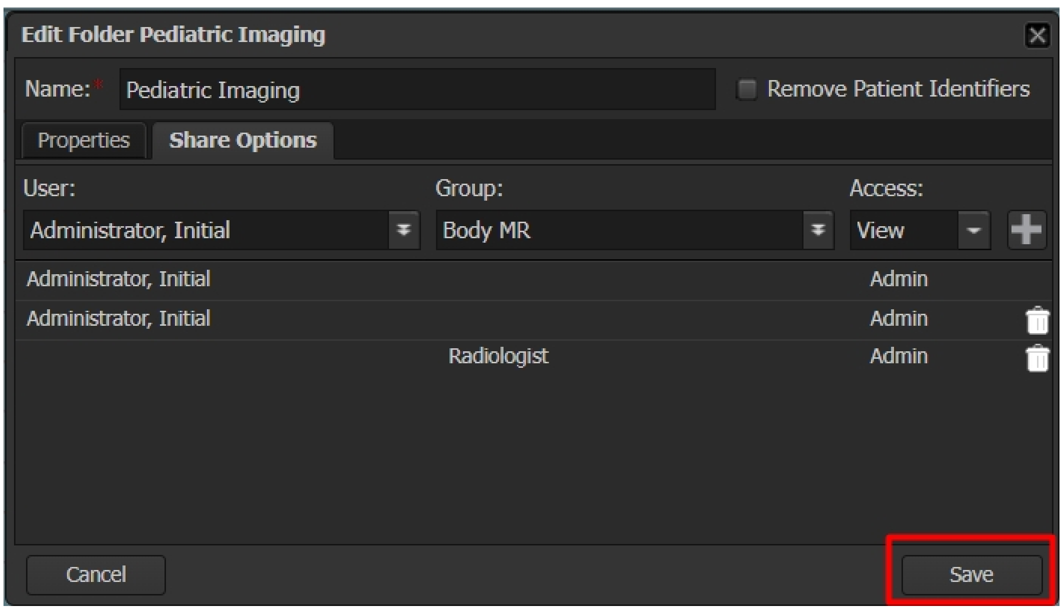
3. In the Edit Folder dialog, click the **Share Options** tab.
4. Select the users or groups with whom you want to share this folder.
5. Select the level of access you want to assign to these users.



6. Click Add  to add this permission set to the folder.



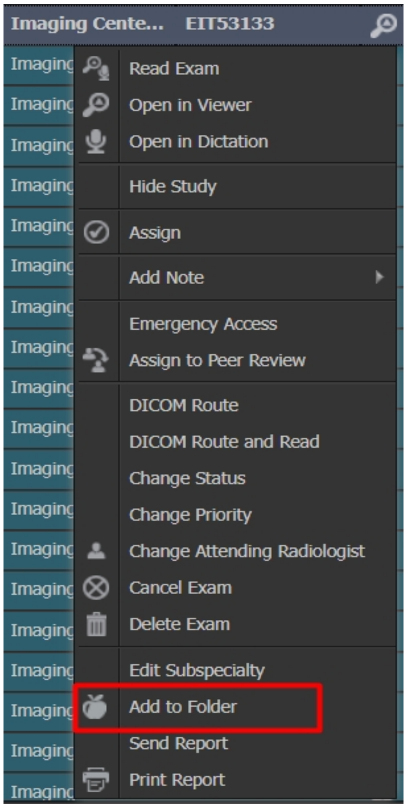
7. Click **Save**.



To add an exam to a folder:

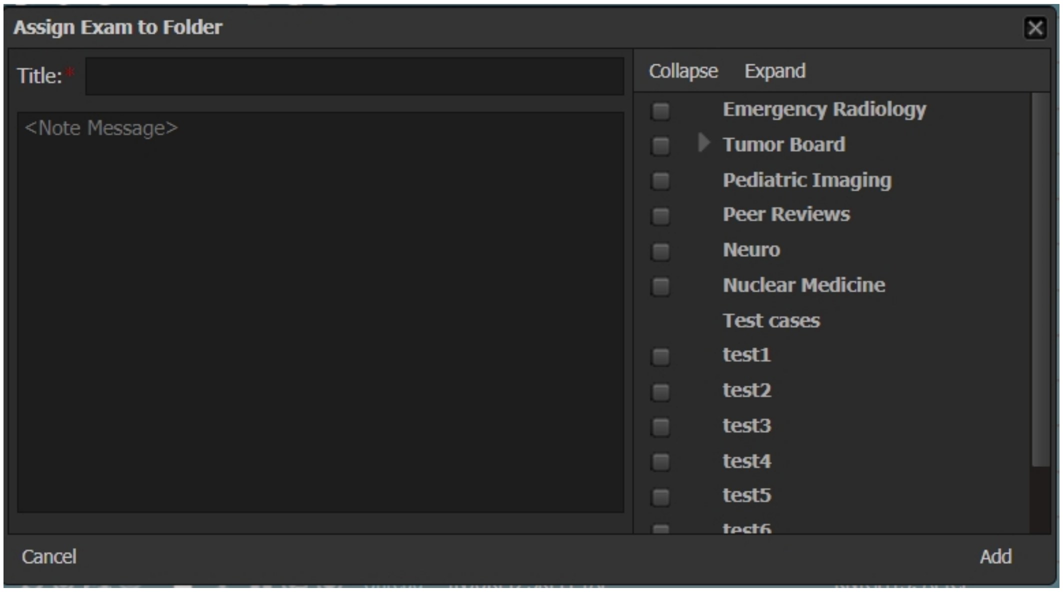
1. Open an exam or a worklist.
2. Do one of the following:

- Right-click an exam on your worklist and select **Add to Folder**.



- From the Notes section of the Patient View, click the Teaching Note icon .

3. In the Assign Exam to Folder dialog, enter the subject of the note in the **Title** field and then enter a message in the **Note** field that describes why you are adding this exam to the folder.
4. Enable the check box for the folder you want to add the exam to.
5. Click **Add**.



To remove an exam from a folder:

1. In the Worklist column, click the **Folder** tab.
2. Click the folder that contains the exam you want to remove.
3. In the list of exams that opens, click the trash can icon next to the exam you want to remove.

To open an exam from a folder:

1. In the Worklist column, click the **Folder** tab.
2. Click the folder that contains the exam you want open.
3. Click the Launch in Viewer icon.

To edit a teaching note for an exam in a folder:

1. In the Worklist column, click the **Folder** tab.
2. Click the folder that contains the exam you want edit.
3. Click the pencil icon.

4

COLLABORATION AND COMMUNICATION

InteleOrchestrator has several built-in features that allow you to communicate with other radiologists, collaborate with other radiologists on exams, and help administrators to broadcast information to the practice.

In this chapter:

Collaborating With Other Radiologists

The Collaboration tool has been deprecated for InteleOrchestrator version 4.4 and later. Please see About Messaging for more information about the replacement for Collaboration.

Collaboration is a tool, available in InteleOrchestrator version 4.3 or earlier, for radiologists to communicate with one another about a specific exam. This feature is only available after you open an exam. When starting or accepting a collaboration, both collaborating radiologists receive a pop-up window that contains information related to the exam. From this window, radiologists can see patient and exam information, preliminary or final reports, and any notes associated with the exam. Collaborating radiologists can chat with one another and the accepting radiologist can easily launch the images.

You must turn off your web browser's pop-up blocker for the collaboration window to open.

To start a collaboration:

1. Open the exam.
2. Click the Collaboration button in the Communication taskbar.
3. Select the **User** with whom you want to collaborate.

   This list is only populated with users who are currently online and using either the worklist or in a patient view.

4. Click **Submit**.

To accept a collaboration:

- Click **Accept** when the collaboration invitation appears on your screen.

Sending Notifications and Alerts

InteleOrchestrator allows users to send notifications and alerts to other InteleOrchestrator users for any type of communication you'd like to track, including critical results, critical tests, and standard call reports. These notifications can also track tasks that a radiologist needs completed before the radiologist is able to read an exam, such as prior reports or exam re-do. These types of notes could be used between the radiologist and their support/operations team. See My Support Queue for how the support/operations team works with communications notifications.

The notification can be created by any InteleOrchestrator user as long as the user has the permission to create the notification and view the notification.

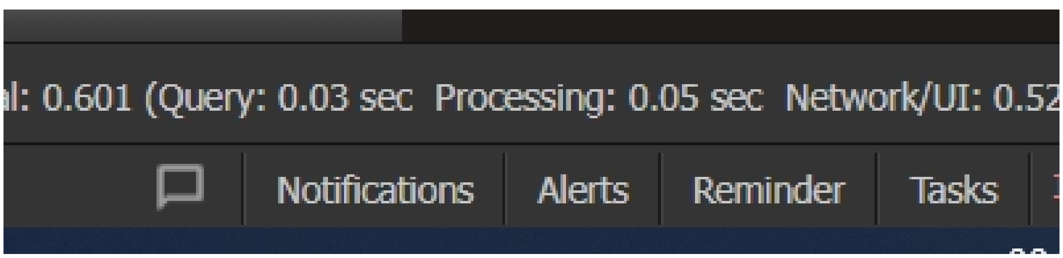
Notifications do not disrupt the radiologist's workflow and are often used for information that is not time sensitive. Notifications that you send to another user appear in the Notifications area on the toolbar.

An alert is a pop-up that the receiving user must acknowledge before resuming to work. As a result, alerts are typically used for time-sensitive information only. Alerts are stored in the lower-right corner of InteleOrchestrator.

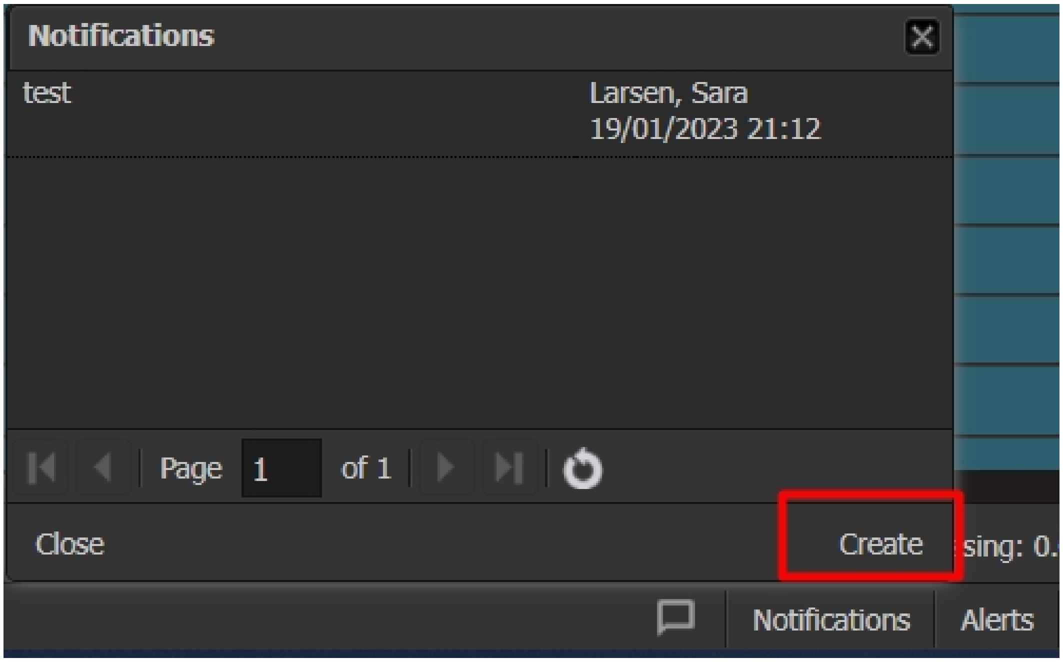
Users can access previous alerts from the Alerts area of the toolbar.

To create a notification or alert:

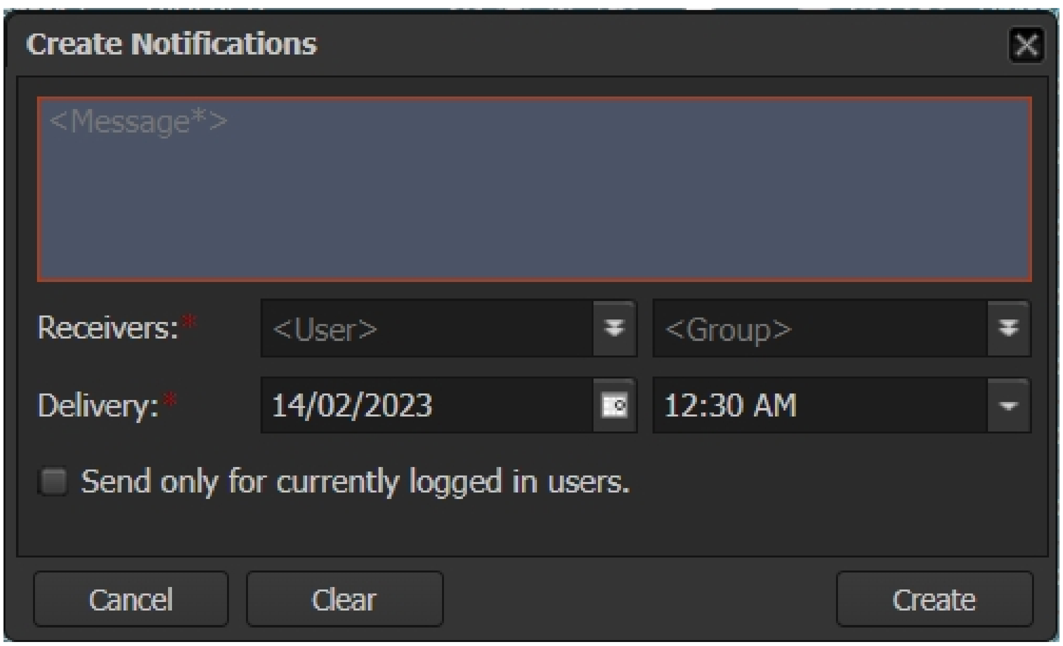
1. In the Communication taskbar, click **Notifications** or **Alerts**.



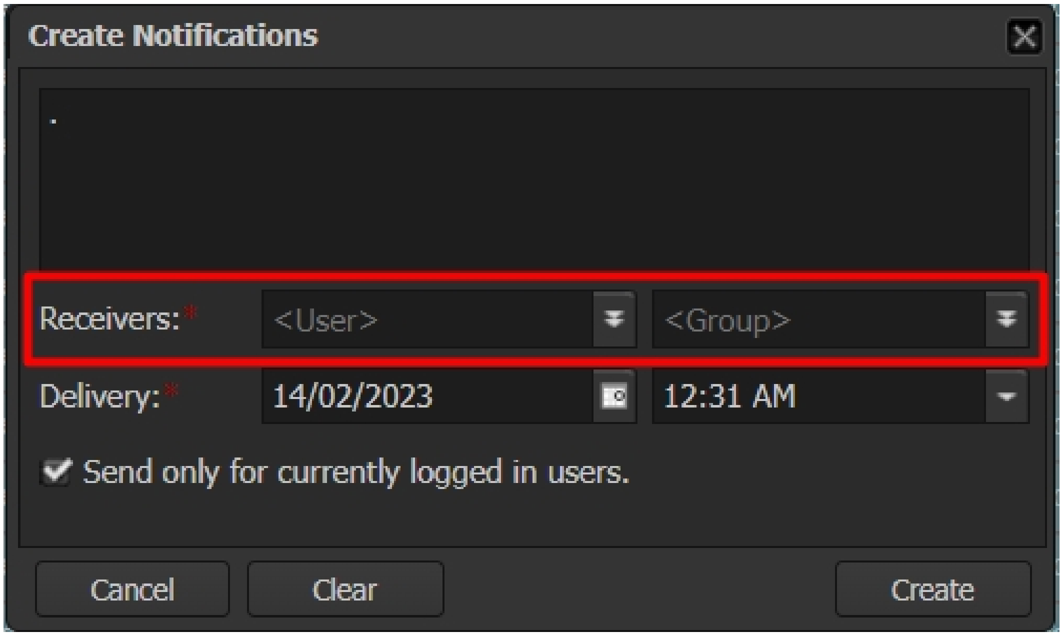
2. In the message dialog, click **Create**.



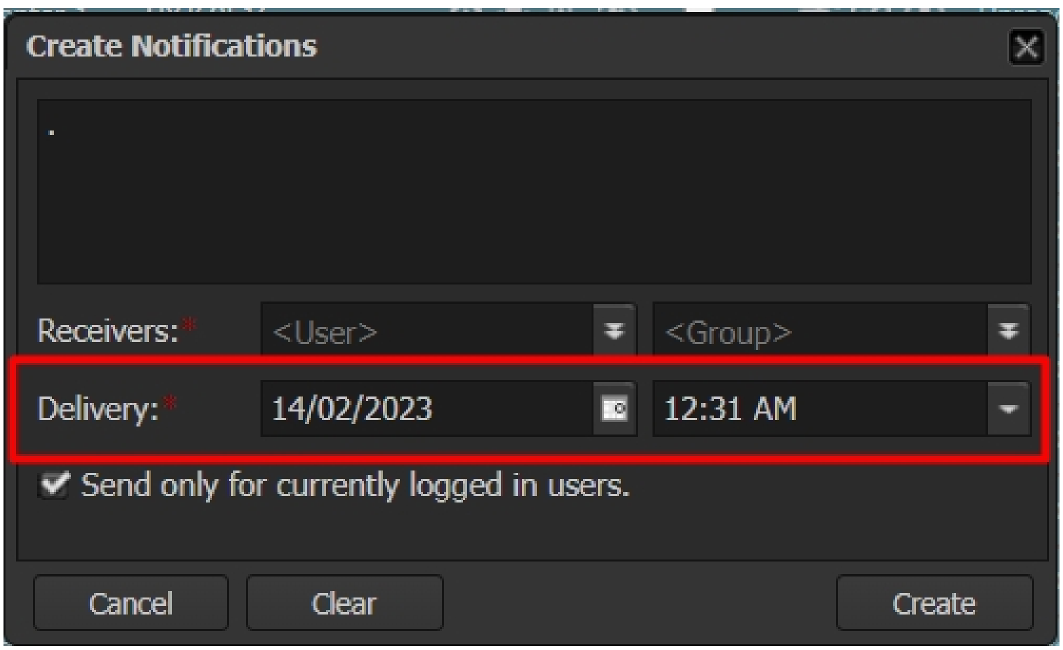
3. Enter the message.



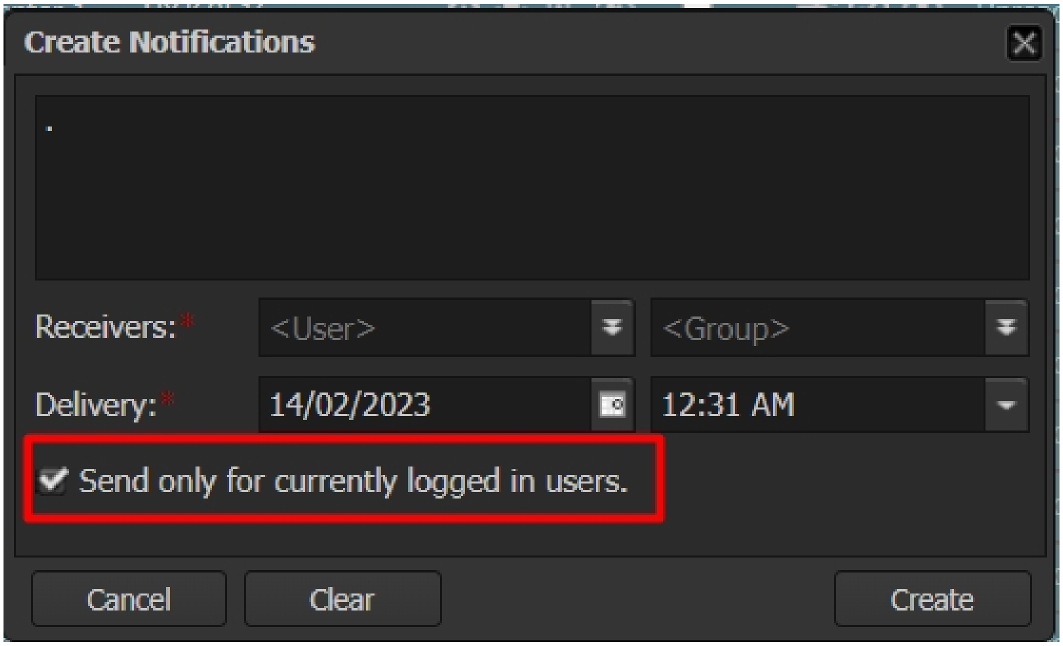
4. Select the users or groups that will receive the message.



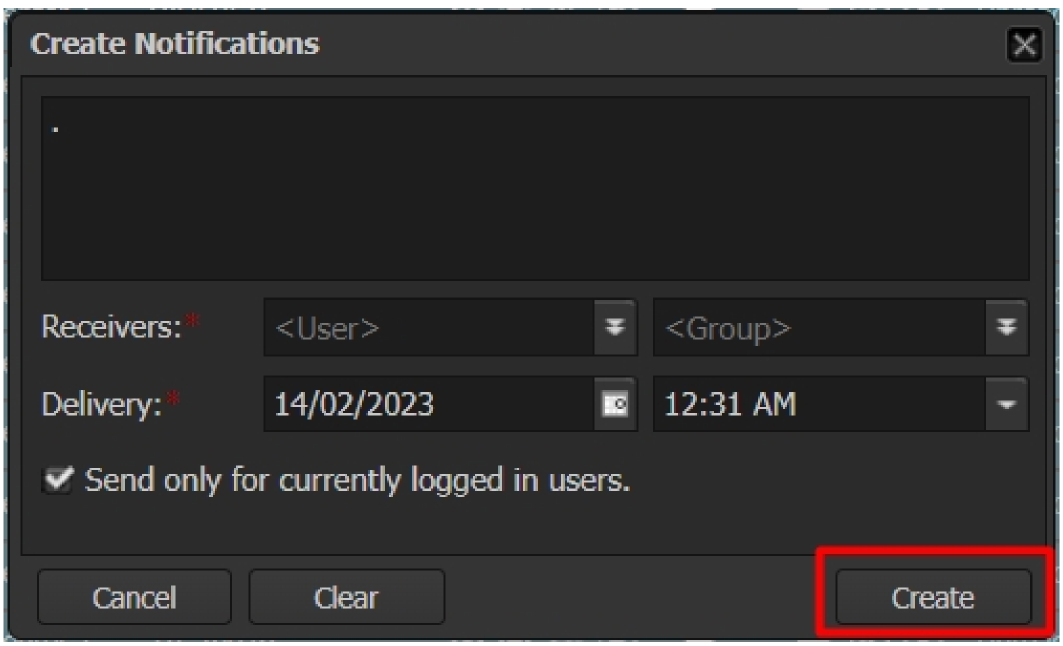
5. Enter the date and time the message will be sent.



6. Enable **Send Only For Currently Logged In Users** if you want the message sent only to users who are logged in at the selected date and time.



7. Click **Create**.



Adding Notes to Exams

You can add different types of notes to exams in InteleOrchestrator.

The available note types depend on the note types your practice decided to deploy. Certain note types can trigger workflows that were configured by your organization. See you InteleOrchestrator administrator for more details.

You can add a note to an exam from:

- the worklist.
- the Patient View.

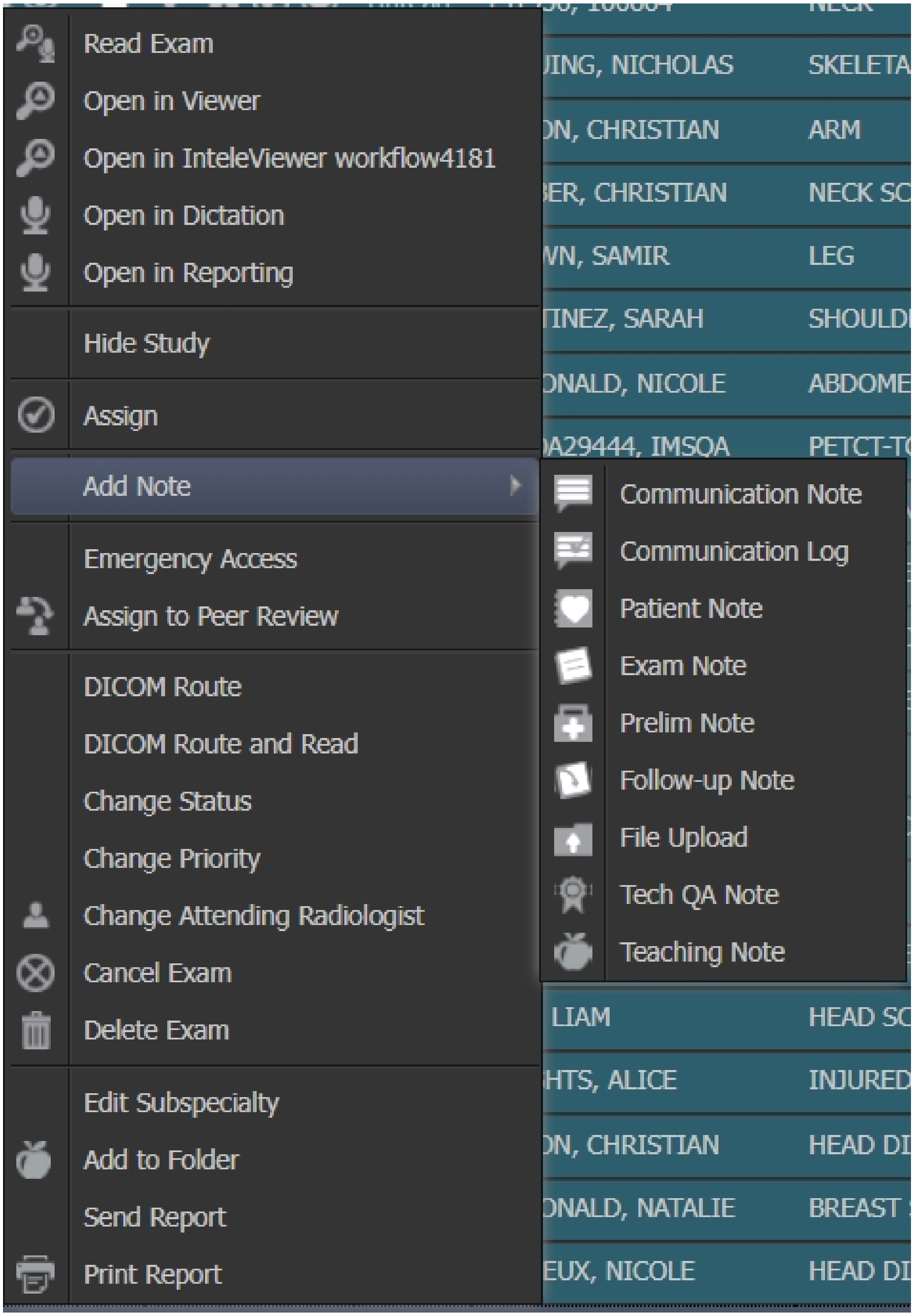
InteleOrchestrator offers the following types of notes for exams:

Note Type	Reason for Use	Icon
Communication note	Communicate different issues with exams. Used mostly to communicate between the radiologist and operations/support staff. Example: Exam is missing images.	
Communication Log	Creates a record of issues with an exam, without assigning the follow-up action(s) to an individual or group.	
Patient Note	Communicate patient-specific information. The patient note will follow the patient throughout the InteleOrchestrator system.	
Exam Note	Communicate exam specific information. The exam note will follow the exam throughout the InteleOrchestrator system. Example: Changing the priority of the exam for a particular reason.	
Peer Review Note	Peer Review specific notes. See Peer Review Workflow for examples where peer review notes are used during the Peer Review workflow.	
Prelim Note	ED prelim notes or other notes from a preliminary read.	
Follow-Up Note	Communicate follow-up appointment needs, such as diagnostic breast follow-ups.	
File Upload	Records the filename and optional note, along with details of who uploaded the file and when.	
Teaching Note	Adds an exam to a Folder and prompts for a Title and a Note to describe why it is being added to that folder.	
Tech QA Note	Communicate to track technologist quality.	

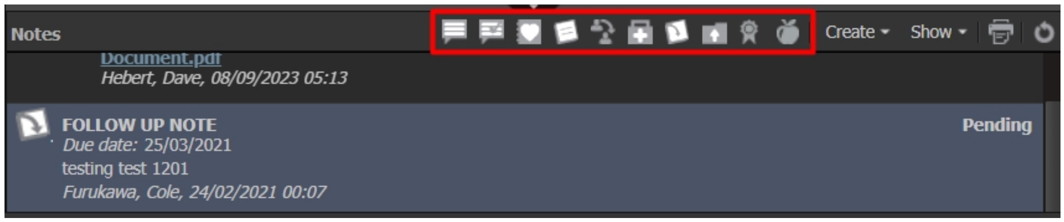
To add a note to an exam:

1. Do one of the following:
   - In the worklist:
     a. Right click on any exam on your worklist.
     b. In the list that appears, hover the mouse over the **Add Note** option.
     c. From the list that appears on the right, select the note type you would like

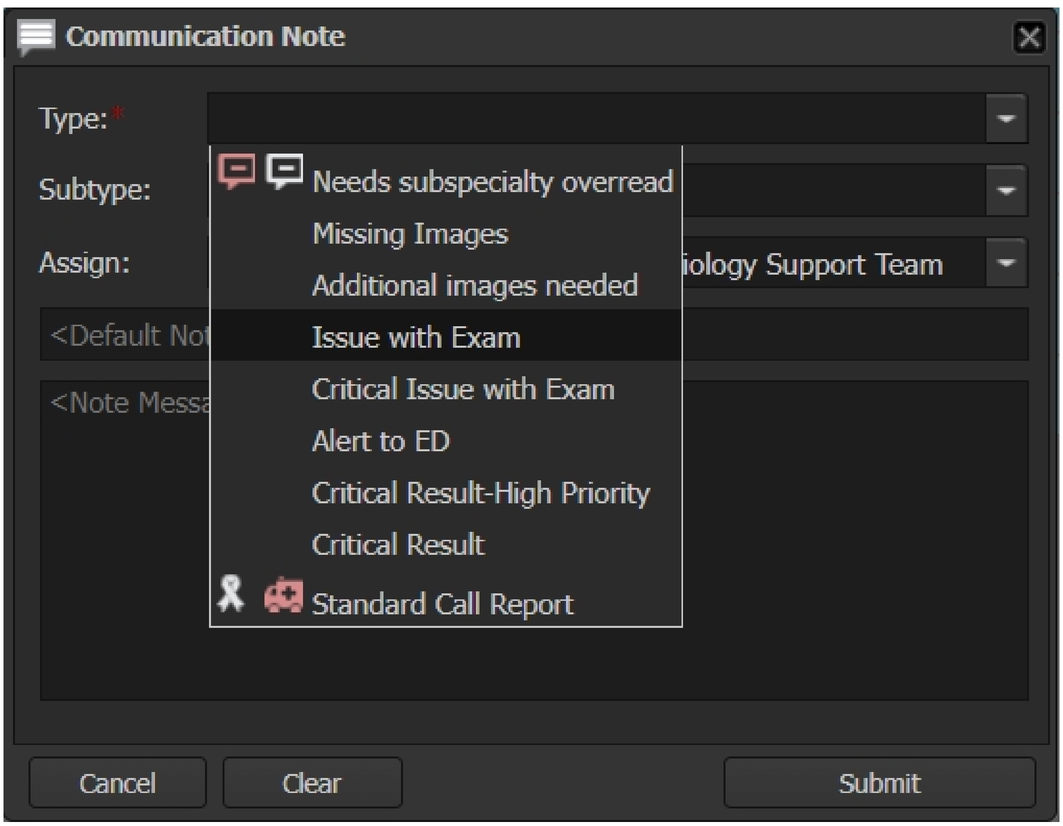
to enter.


Read Exam
Open in Viewer
Open in InteleViewer workflow4181
Open in Dictation
Open in Reporting
Hide Study
Assign
Add Note
Emergency Access
Assign to Peer Review
DICOM Route
DICOM Route and Read
Change Status
Change Priority
Change Attending Radiologist
Cancel Exam
Delete Exam
Edit Subspecialty
Add to Folder
Send Report
Print Report
Communication Note
Communication Log
Patient Note
Exam Note
Prelim Note
Follow-up Note
File Upload
Tech QA Note
Teaching Note

- From the Patient View:
  a. View or read an exam to access the Patient View
  b. From the Notes section at the bottom of the Patient View, click the icon for the type of note you want to use.

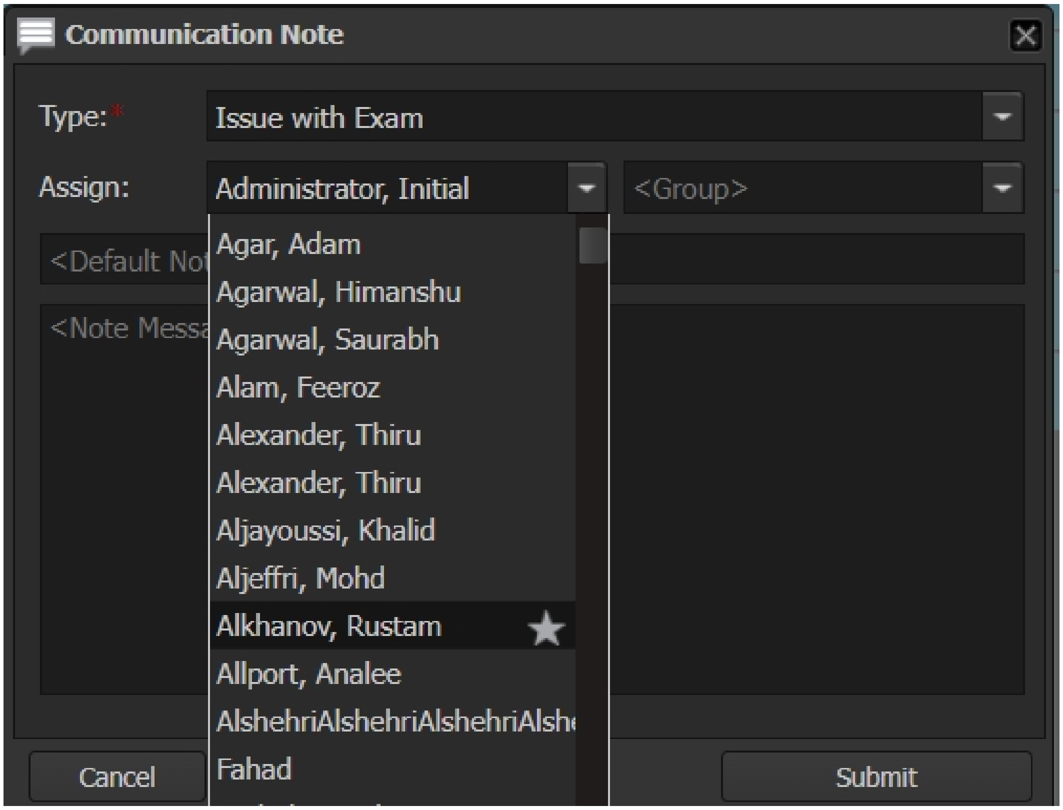


2. For example, click on the Communication Note icon. Populate the fields in the note dialog that opens.
3. Click the **Type** dropdown menu and select the note type.

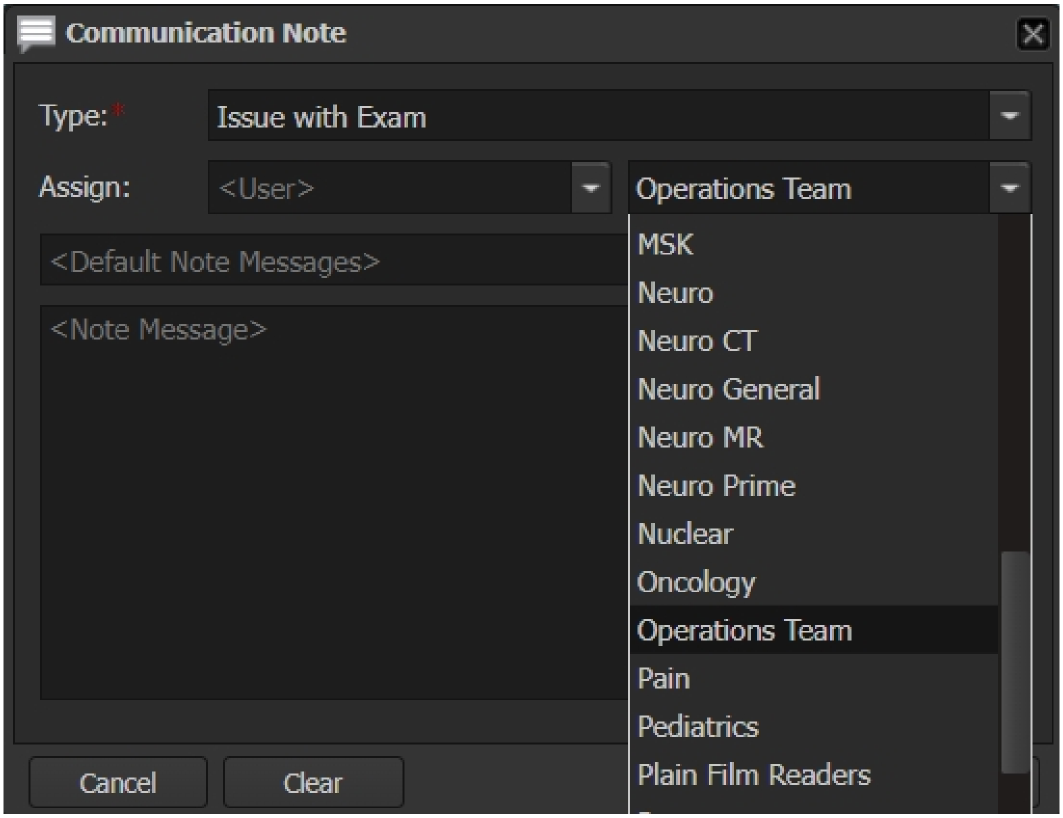


4. Assign to either a specific user(s) or to a group.

- Select the <User> drop-down to assign to specific users.



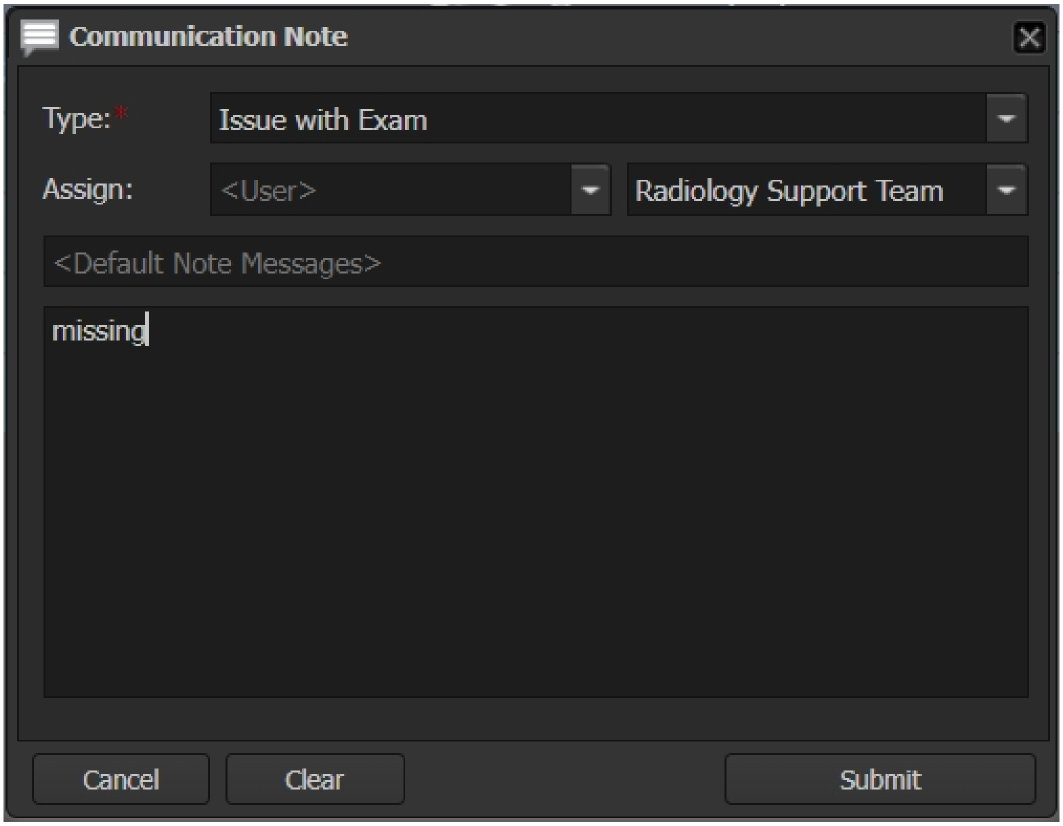
- Select the <Group> drop-down to the note to a group.



- Leave the note unassigned if you want to assign the note to the Operations team/support staff. See Assigning a note to the Operations/Support Staff.

You can click the star next to a user name or group name for those contacts you use often. That will result in those favorites being listed at the top of the drop-down menu. Click the star to deselect the contact to no longer keep that user or group as a favorite in the Assign drop-down list. The user or group will then fall back to the original position in the list.

5. Add text to the message for example missing.
6. Click **Submit**.

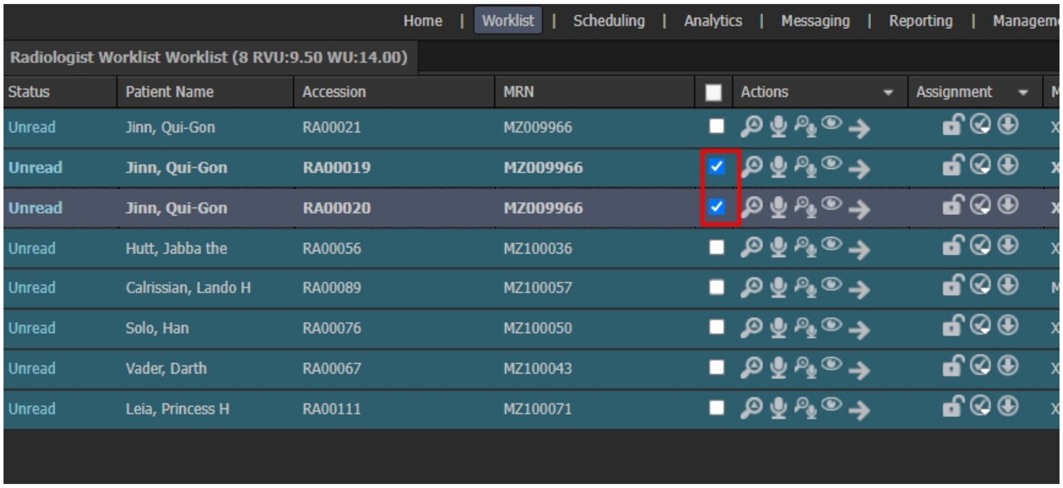


Indicating Public on a note means that the note is visible to anyone who can see the exam in a worklist. Indicating Private on a note means it is only visible to the users or groups indicated in the note.

If the type of note you want to create is not listed in the icons on top of the Notes section, click **Create** to access the other note types.

To add a note to multiple exams from the worklist:

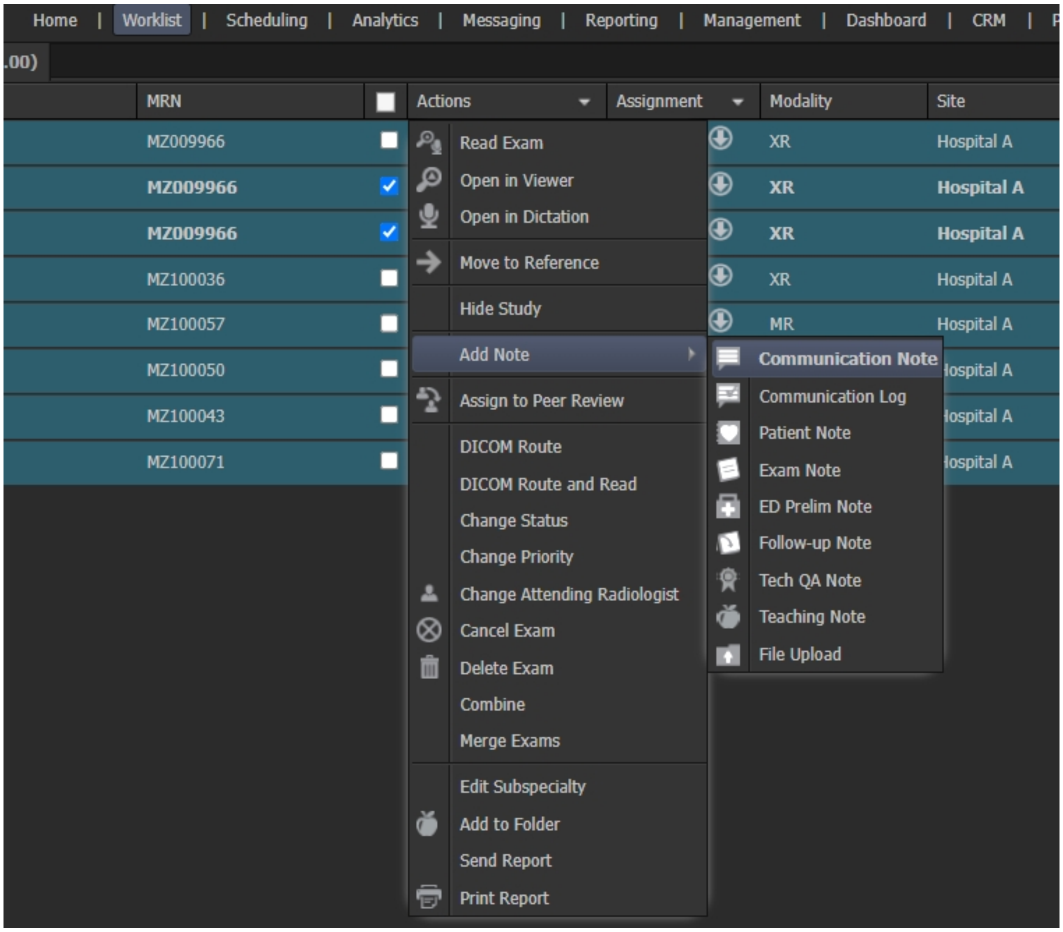
1. Select the check box next to the exams needing notes.



2. Click on the Actions drop down.

3. In the list that appears, hover the mouse over the Add Note option.

4. From the list that appears on the right, select the note type you would like to enter.



Assigning a Note to the Operations/Support Staff

The previous section provided instructions for creating a note that can be assigned to specific groups or other users. You can leave the note unassigned, which would have the effect of sending the note to the whole operations team.

After the note is submitted, the exam containing the note will be removed from the radiologist's worklist and added to the My Support Queue. For more information about the My Support Queue, see My Support Queue.

5

INTELEORCHESTRATOR MESSAGING

InteleOrchestrator Messaging was created to offer improved performance, group management, message notification, and configurable permissions to users. With Messaging, you can quickly send secure messages to any user on the InteleOrchestrator platform - administrators, radiologist assistants, technologists, and other radiologists.

In this chapter:

About InteleOrchestrator Messaging

In InteleOrchestrator versions 4.4 and above, Messaging replaces the Chat and Collaboration features. Messaging was created to offer improved performance, group management, message notification, and configurable permissions to users. With Messaging, you can quickly send secure messages to any user on the InteleOrchestrator platform - administrators, radiologist assistants, technologists, and other radiologists.

With Messaging, you can:

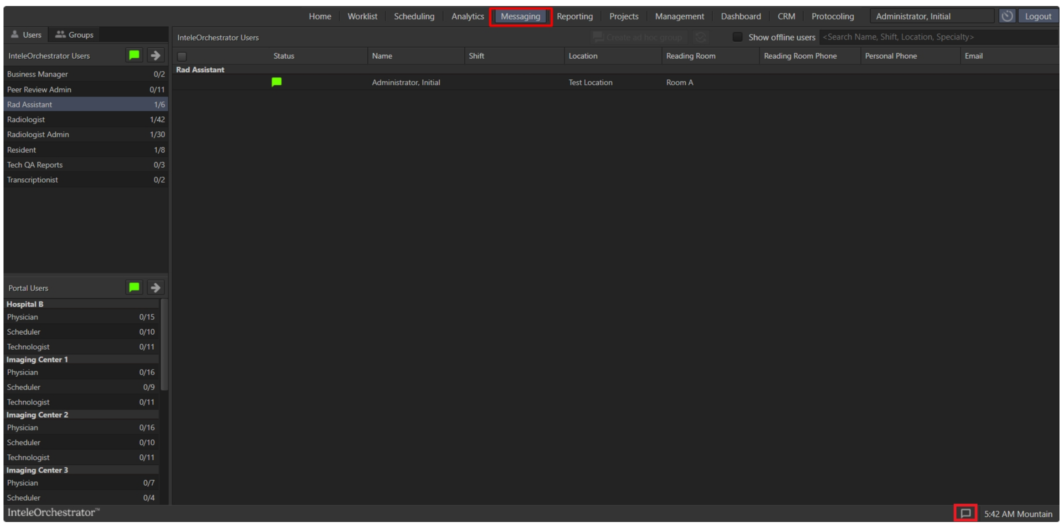
- Find users by searching name, subspecialty, shift, location, and reading room
- Send messages to offline users
- Broadcast messages to multiple users
- View which users are online or offline
- Obtain a user’s telephone number
- Send links of patient studies to provide or request a second opinion
- Set your status to available, busy, or offline
- Know where a user is currently situated

To use this feature, ask your InteleOrchestrator administrator to enable the Messaging permission for your user account.

Opening Messaging

The Messaging page can be opened from:

1. The Home screen.
2. The InteleOrchestrator Menu at the top of any InteleOrchestrator Application.
3. The Messaging icon in the Communication Taskbar.



When you have unread messages, the Messaging icon will be green and will show the number of unread messages.

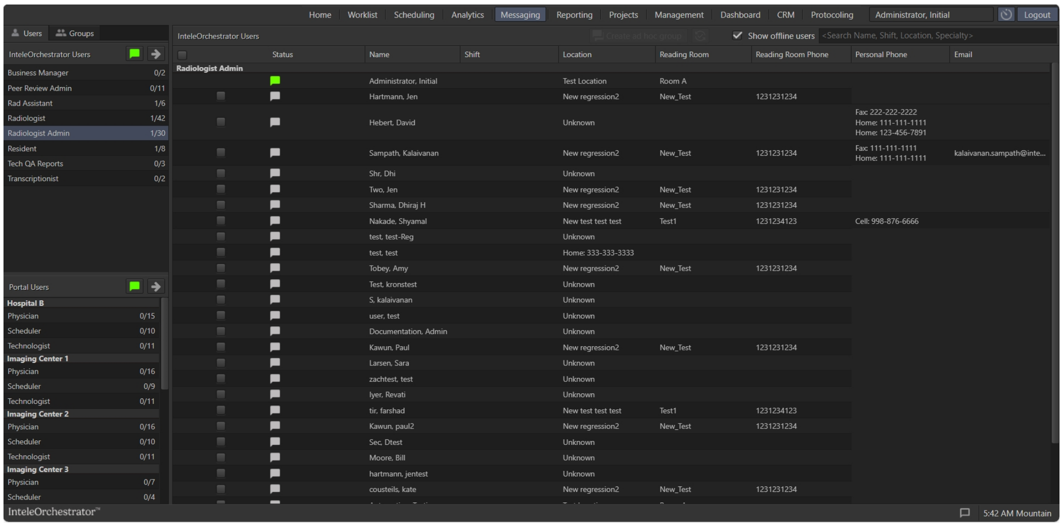
To use the Messaging feature, ensure that your InteleOrchestrator administrator has granted you the Access to User Messaging role within the User Role permissions. If you don't have access to the Messaging module, please reach out to your InteleOrchestrator administrator for assistance.

Understanding the Messaging Page

The Messaging page provides a list of all Messaging users, including their current Status, Name, Specialties, Current Room Location, Department, Personal Phone Number, and Email Address.

This page allows you to initiate conversations, send messages to offline users, broadcast to multiple users, share study links with users, view telephone numbers, and copy email addresses.

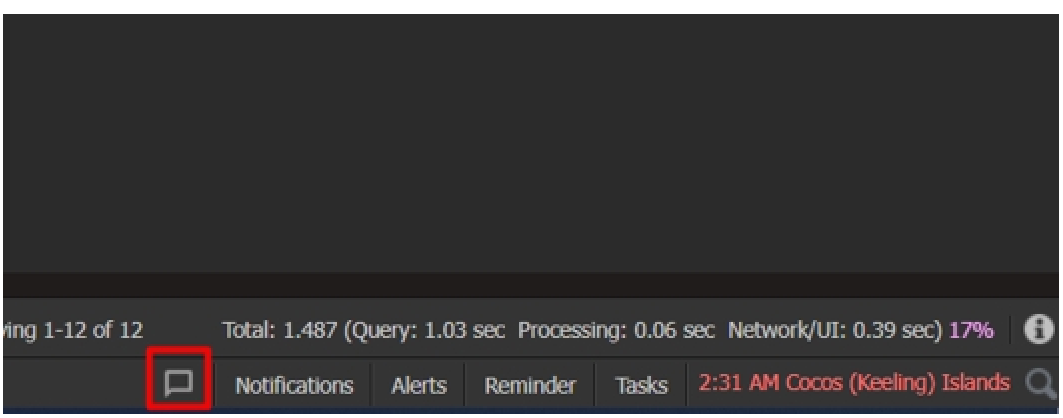
You can also tell who is online by looking at the color of the messaging icon next to their name. In the below screenshot, all users are offline, as indicated by the gray messaging icon.



Opening the Messaging App Window

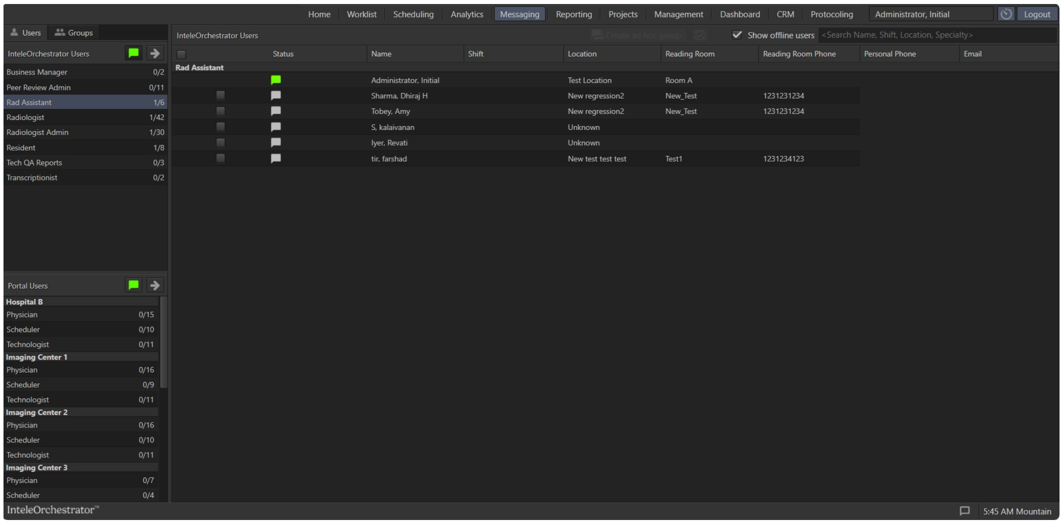
It's important to disable the pop-up blocker in your web browser to allow the InteleOrchestrator Messaging page to open successfully.

1. Click on the Messaging icon in the lower right corner of the Worklist or Messaging page.



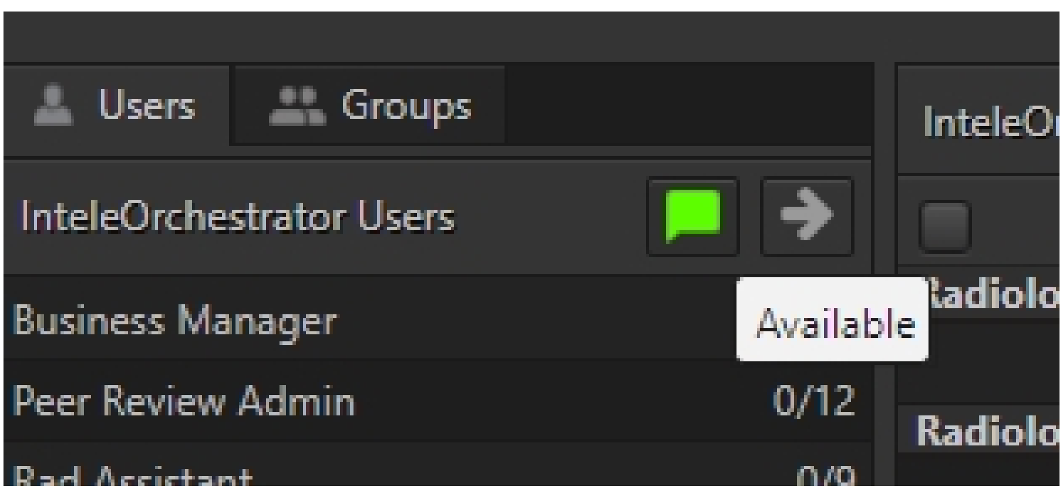
2. If you log in and you have unread messages, this Messaging icon will show green, you can click on it and it will take you to that conversation in the Messaging App window.

   If you do not have any open messages, clicking this icon will open a new browser tab displaying the Messaging page.



Changing your Messaging Status

Your Messaging status determines your availability to communicate with colleagues via Messaging. Upon logging into InteleOrchestrator, your Messaging status icon is automatically set to the color green (Available). This means you are ready to send and receive messages and links related to ongoing orders.



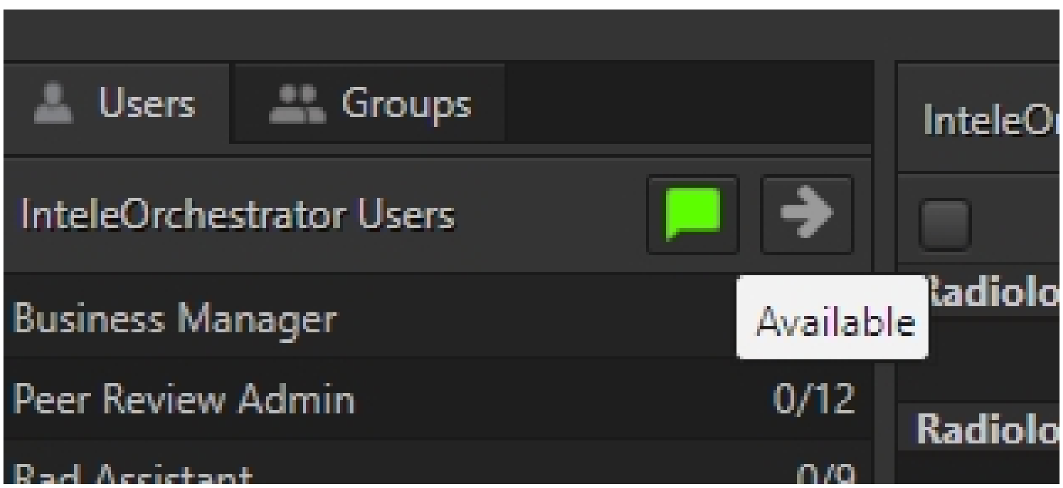
When you log out of the InteleOrchestrator your Messaging status icon automatically changes to the color gray (Offline).

The Messaging status icons are defined as:

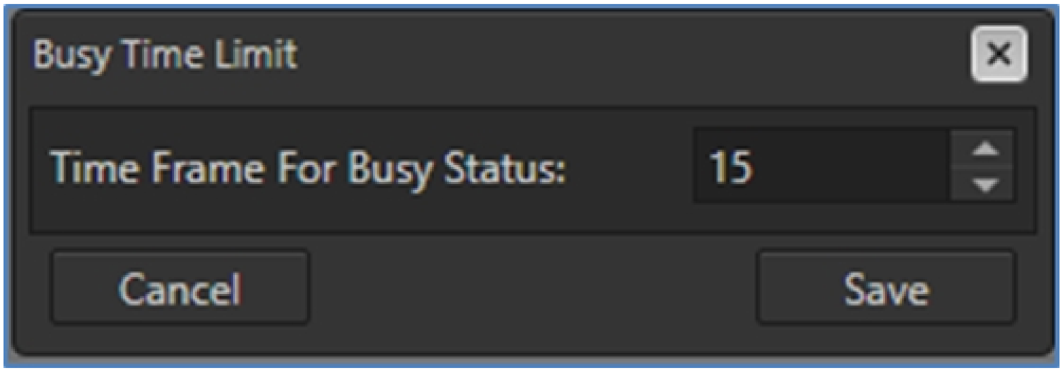
Messaging status icon:	Indicates:
	Available: This status indicates that you are online and actively available to send and receive messages.
	Offline: When your status is set to "Offline," it means you are currently not logged into InteleOrchestrator. However, once you log in, you will receive any messages sent during your offline period.
	Busy: Choosing the "Busy" status signifies that you are online but occupied with other tasks. During this time, colleagues will not be able to send you messages.

To change your Messaging status to Busy:

1. Click your Messaging status icon which is found in the header of the **InteleOrchestrator Users** list. Because you are online your Messaging status icon will show as green (Available).



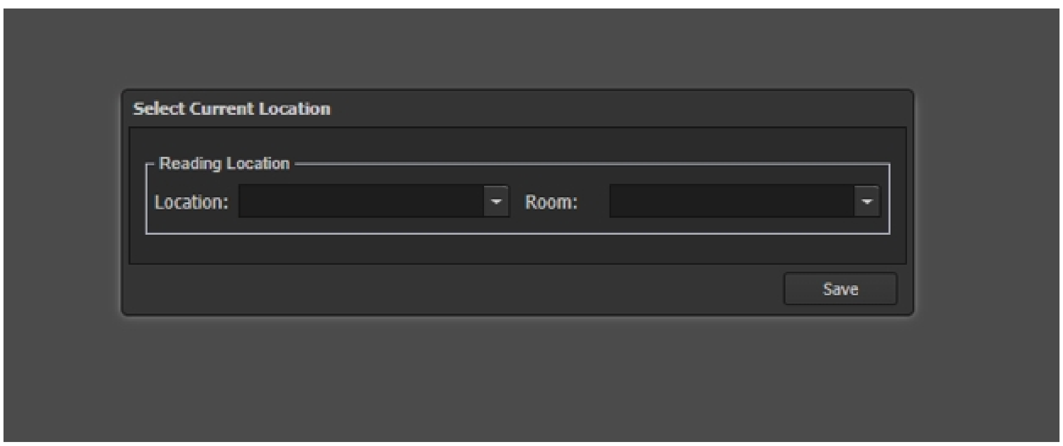
2. A **Busy Time Limit** popup window is displayed. Set the desired time frame for the Busy status. The maximum Busy Time Limit is configured by the Administrator.



3. Click **Save**.
4. Your Messaging status icon will now be red with a line through it (Busy). Your colleagues will see a red Messaging status icon next to your name in their Messaging user list for the next 15 minutes.

Setting Location Information

Location information is set when you open InteleOrchestrator. This pop up will appear at login if that permission is set by the administrator or you can click on the shift icon.



Searching for Messaging Users

To include offline users in the list, check the "Show offline users" checkbox.

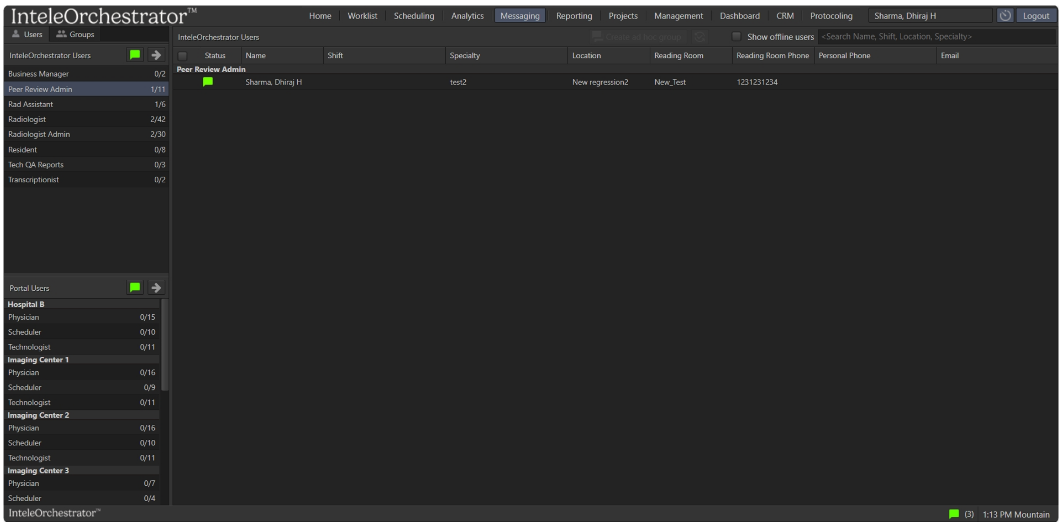
You can filter the list of InteleOrchestrator users by applying filters to display specific information and user groups.

To sort the columns in the Messaging list, simply click on a column heading. To reverse the sort order, click the column heading again. By default, the table is sorted by last name, first name in ascending order, while the Name column displays first name, last name.

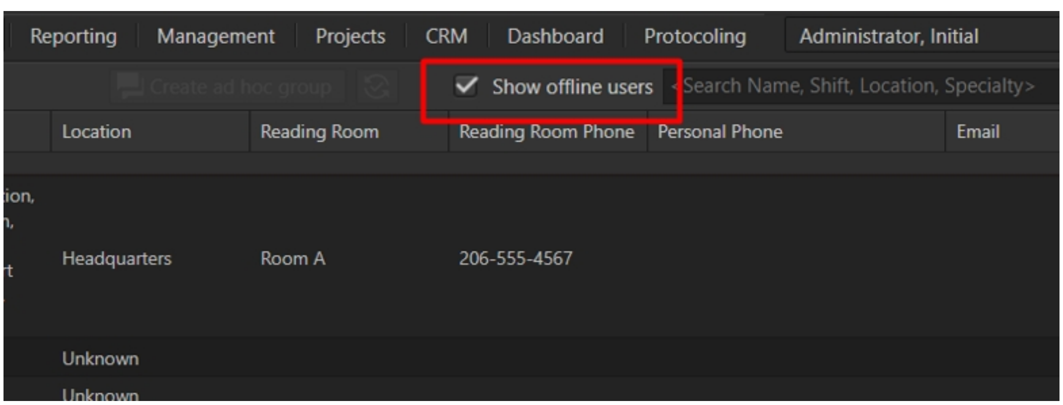
Sending Messages

Sending a Message

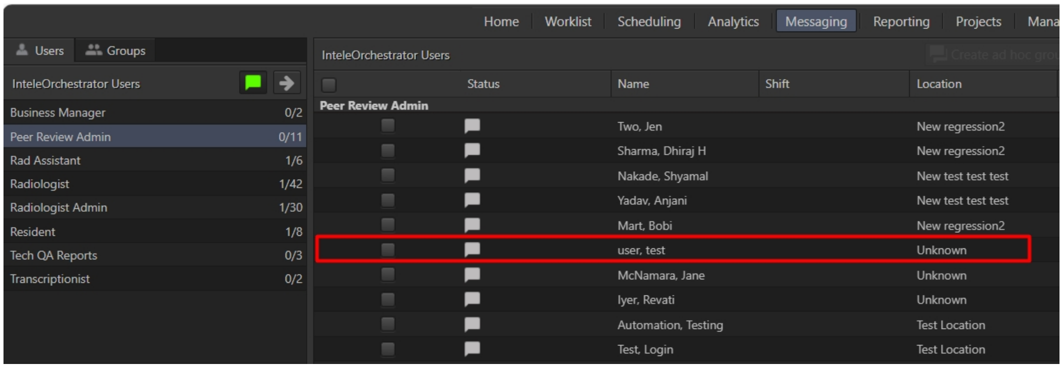
1. Open Messaging. By default, all users online are shown.



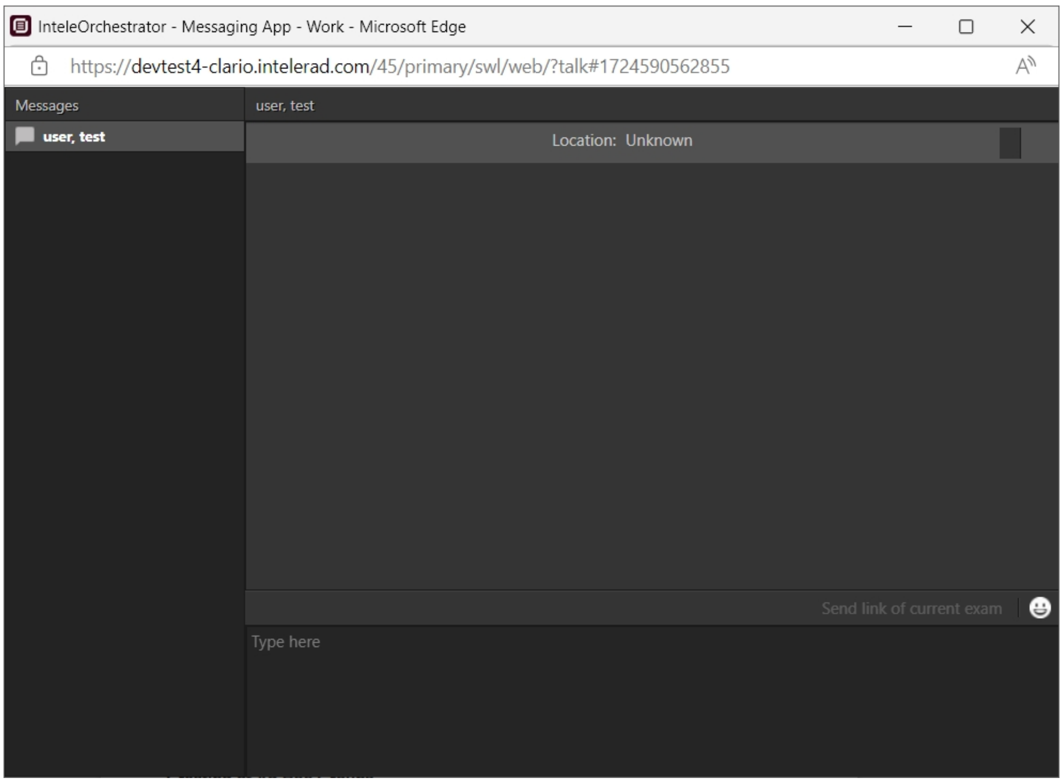
The list only includes online InteleOrchestrator users. If you want to see offline users as well, make sure to select the **Show offline users** checkbox.



2. Double click on the user you want to send a message to.



3. This will open the Messaging App window.



4. In the dialog box, enter your text in the bottom field and press ENTER.

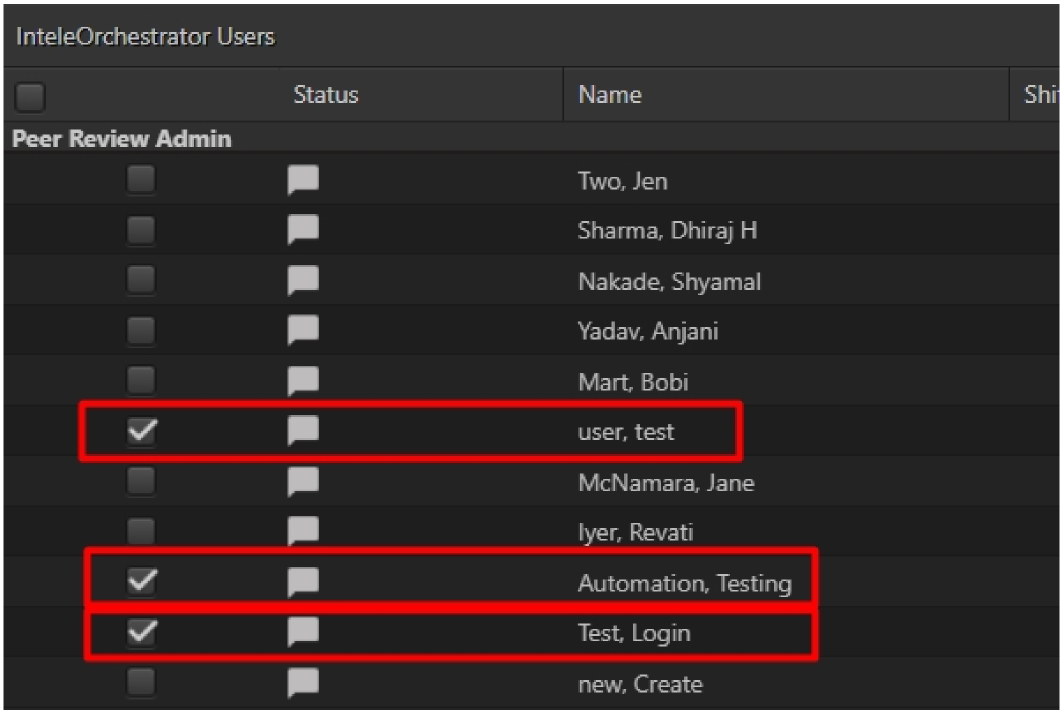
Sending a Message to 2+ Users: Ad Hoc Groups

Creating of Ad Hoc Groups

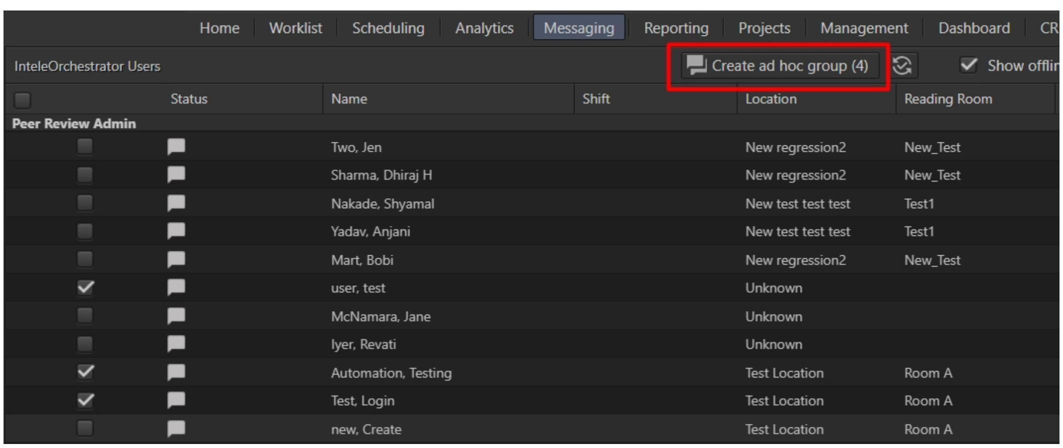
By using the ad hoc group functionality, you can efficiently engage with multiple users without creating a formal group for future messaging purposes.

When we close the Messaging App window, the Ad Hoc group will automatically go away.

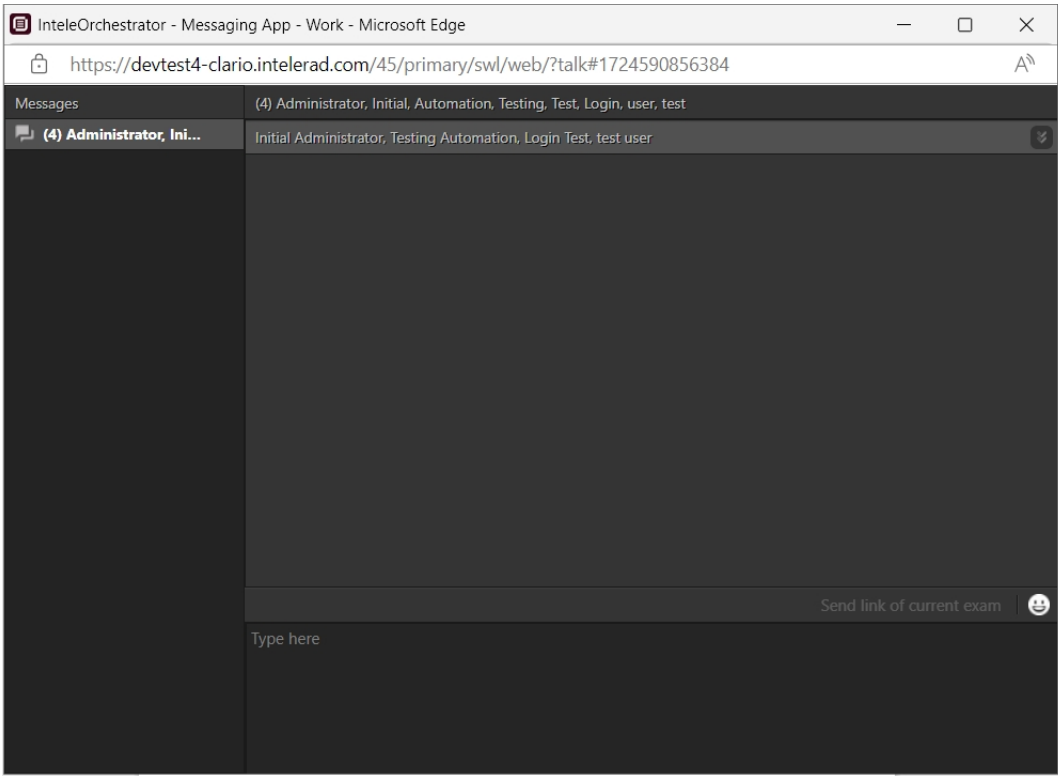
1. On the left side of each user row, click the checkbox to select the desired users. You can select two or more users.



2. Once users are selected, the option **'Create ad hoc group'** will be active.
3. In the upper right corner of the window, click on **'Create ad hoc group'.**

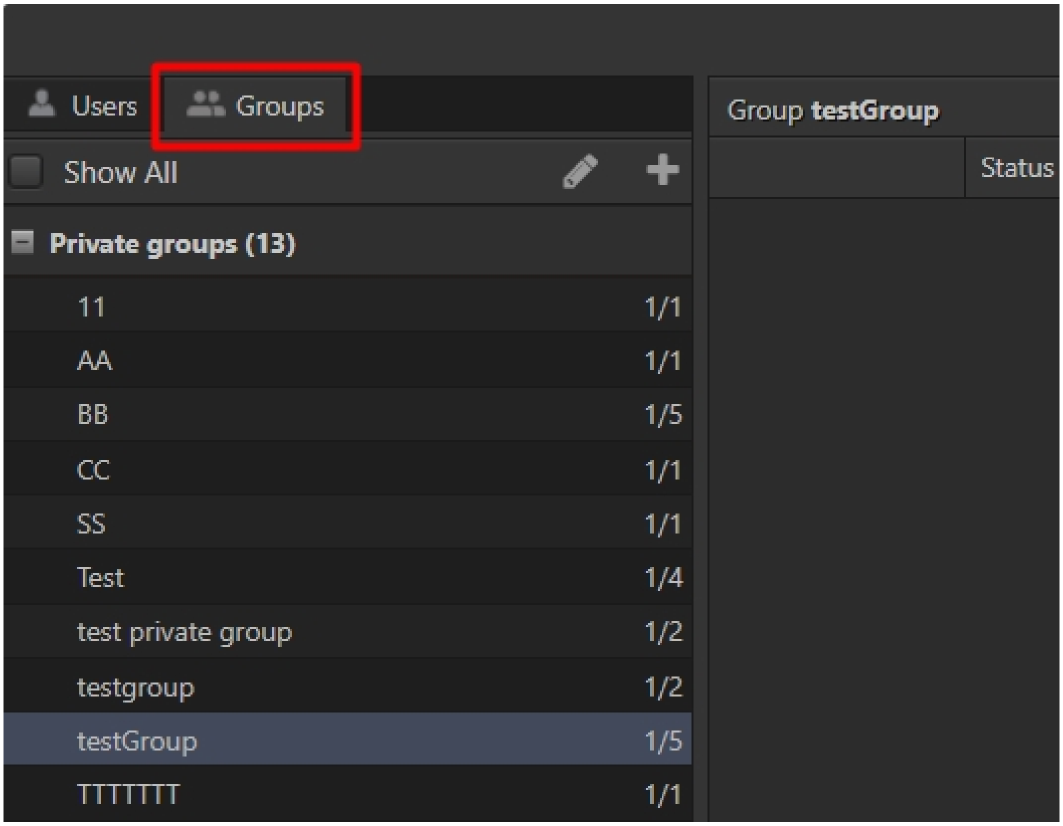


4. A Messaging App window will then appear, presenting an Ad Hoc group conversation that includes all the users selected in the previous step.

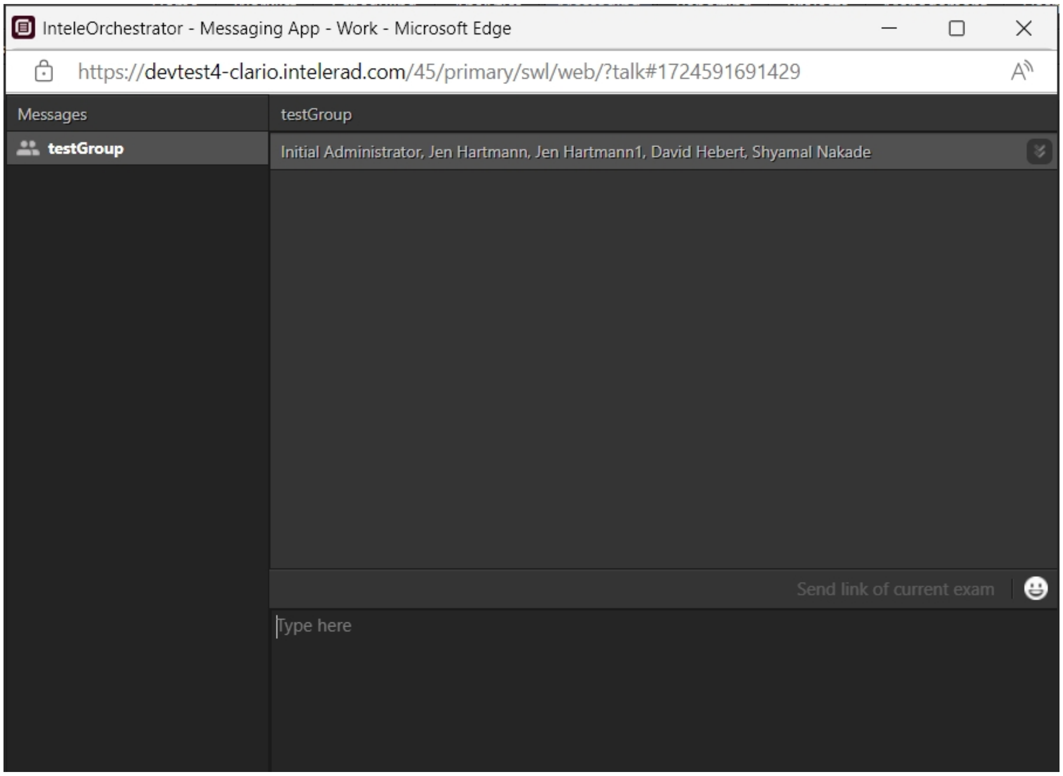


Sending a Message to an Existing Group

1. On the Messaging page, click the Groups tab in order to display groups. For more information about creating private groups see [Creating a Private Group.]



2. Double click on the chosen group to initiate a conversation to open a Messaging App window.



3. In the dialog box, enter your text in the bottom field and press ENTER.

Group Management in InteleOrchestrator Messaging

Private Groups

Anyone with access to Messaging can build a Private Group. These will only be seen by members of the group and InteleOrchestrator administrators.

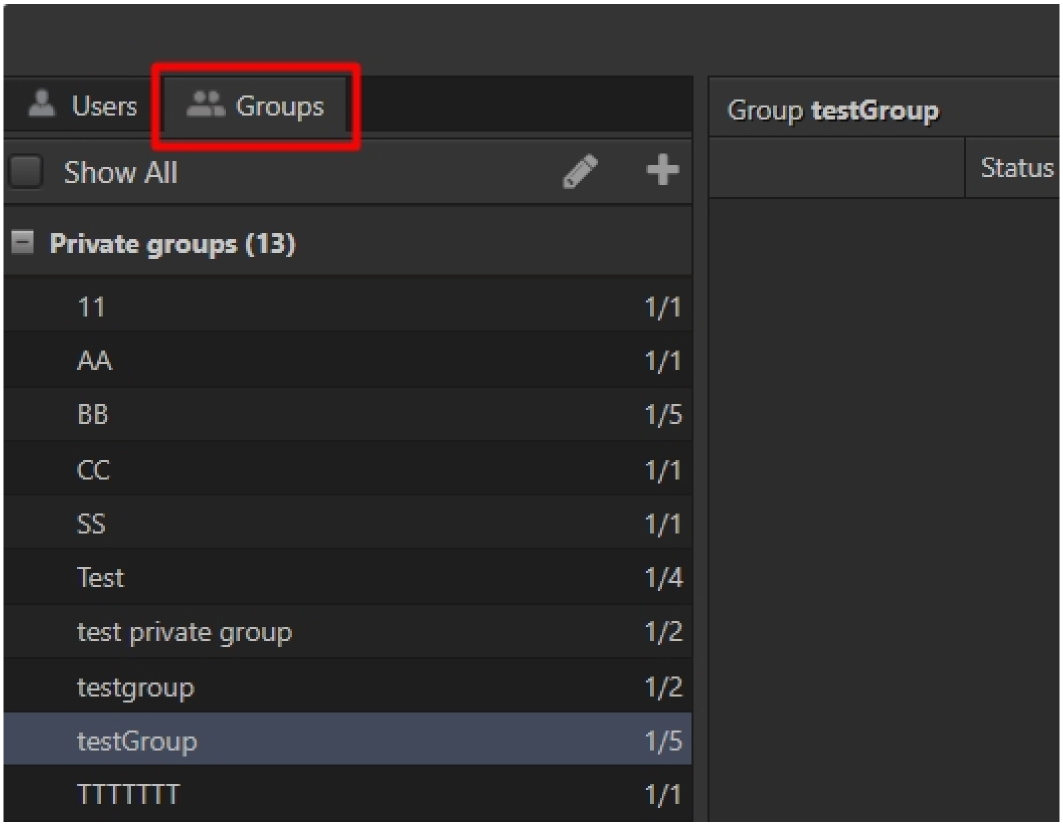
Public groups can be seen by anyone in Messaging. Permission to make them must be granted by the InteleOrchestrator administrator.

Creating a Public or Private Group

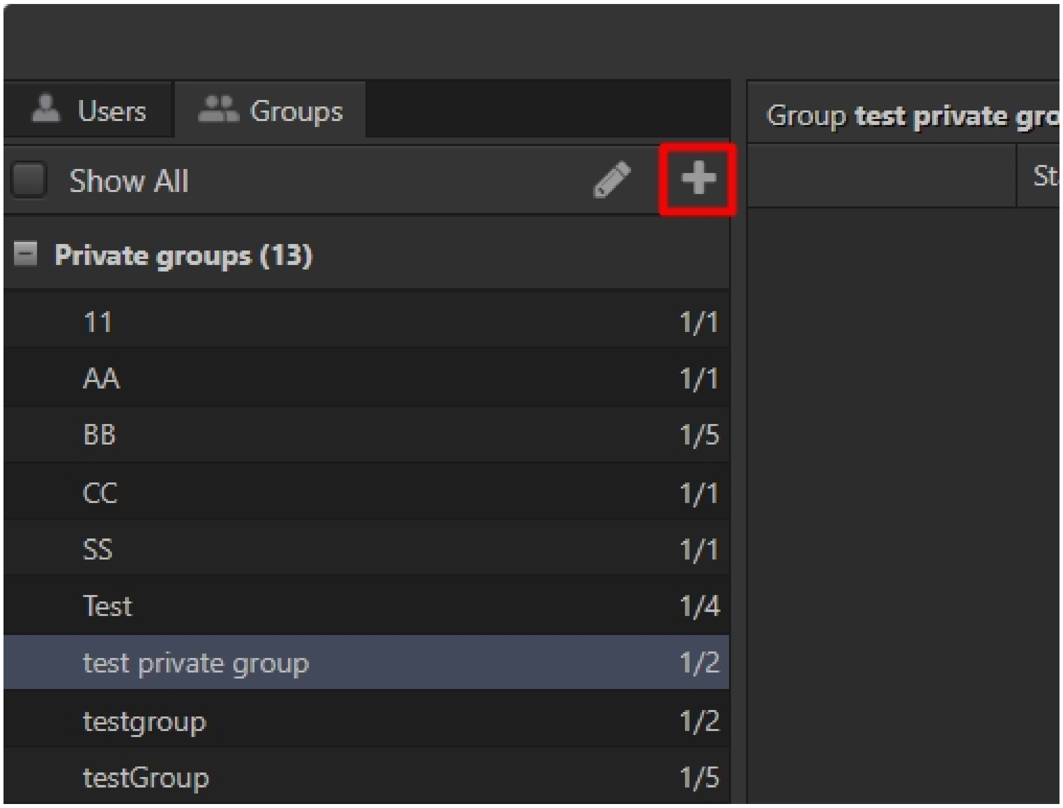
As a user, you have the ability to create a Public or Private group that will remain in the lists of groups until removed. Certain User Role Permissions are required to create a Public group.

To create a group:

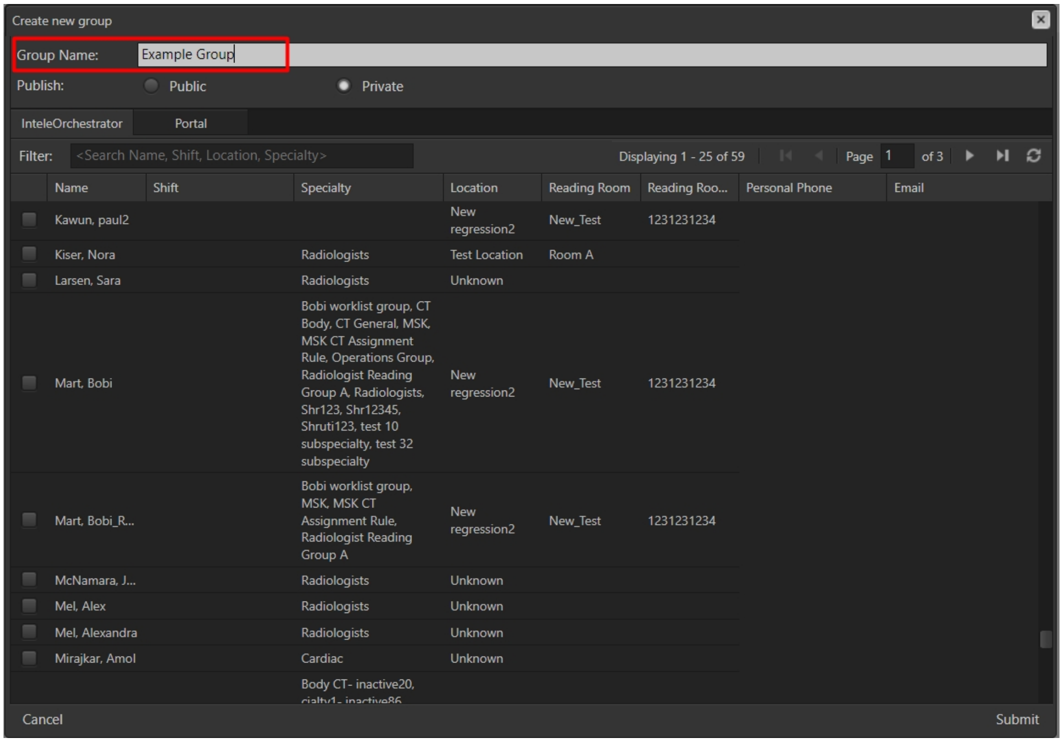
1. On the Messaging page, navigate to the Groups tab.



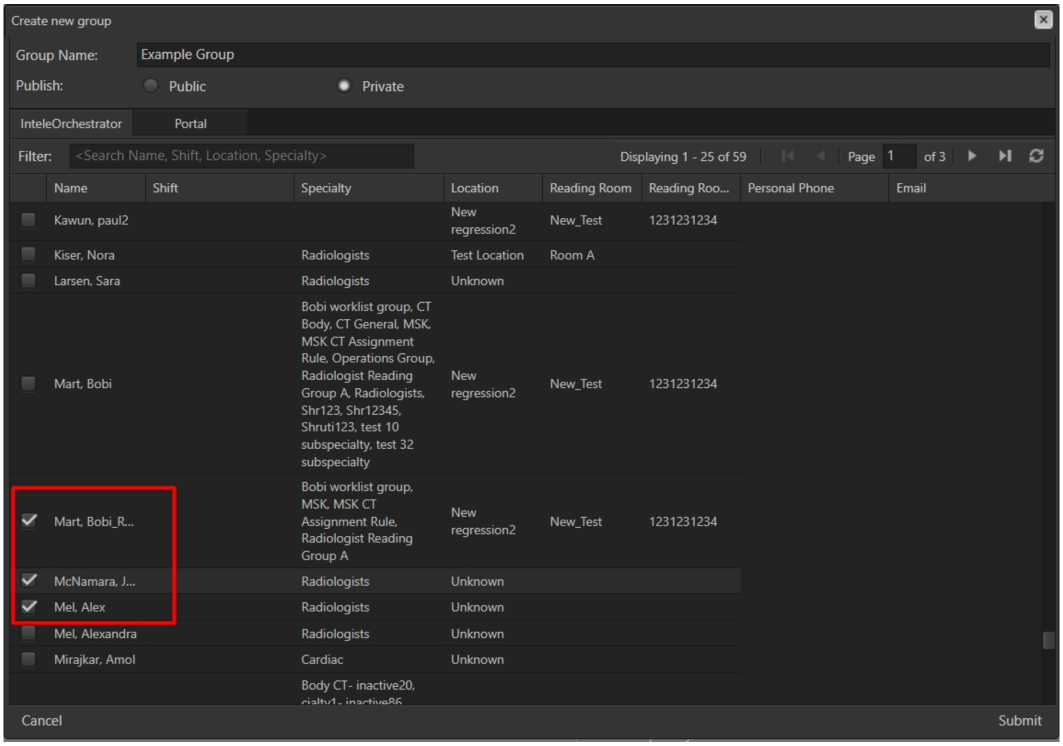
2. Click on the plus icon to create a new group.



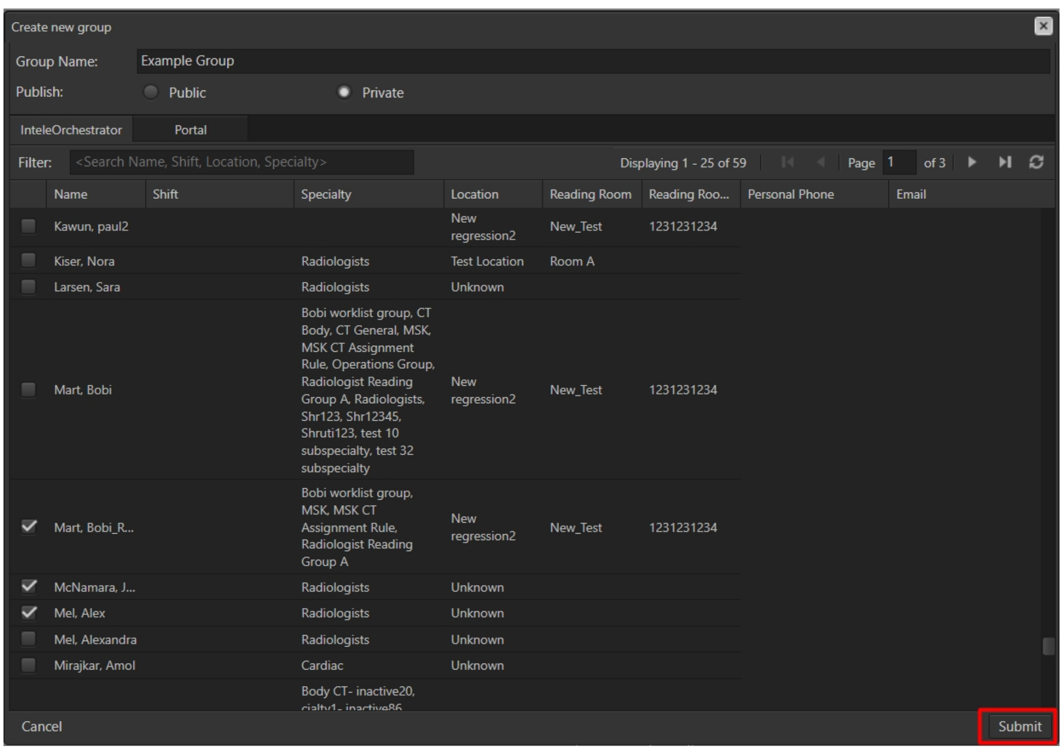
3. Provide a name for the new group.



4. If you have the permission, select either the Public or Private radio button. If you do not have the correct permission, the group will be Private.
5. Select the desired users.



6. Click on the submit button.



7. The group is created and is displayed in the private group list.

8. Both Public or Private groups will remain in the lists of groups until removed.

Deleting a Public or Private Group

Right click the group name in the Groups tab and click Delete.

If you do not see this option, you do not have the Permission set for your role. If you feel this is a mistake, speak to your InteleOrchestrator administrator.

Leaving a Public or Private Group

Right click the group name in the Groups tab and click Leave.

If you do not see this option, you do not have the Permission set for your role. If you feel this is a mistake, speak to your InteleOrchestrator administrator.

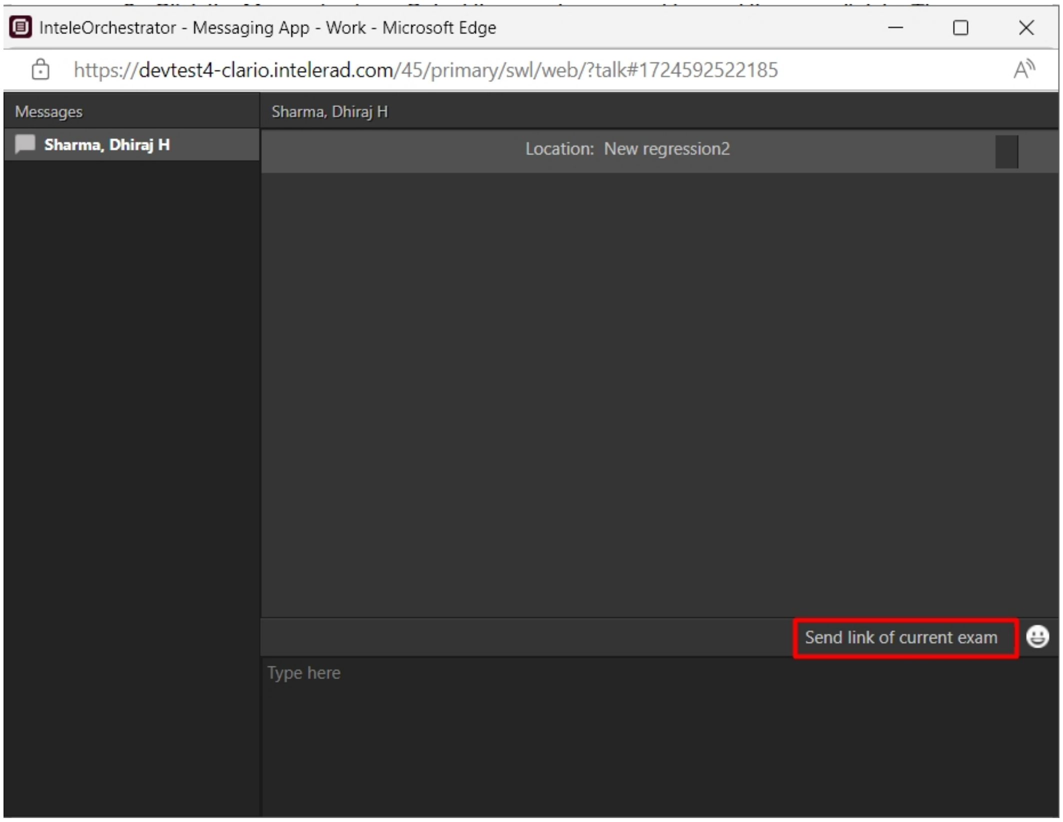
Sending an Exam Link within Messaging

With InteleOrchestrator Messaging, you can send a link to your current exam from the Messaging App. Your exam link can be shared in conversations both with individuals or among a group.

When sharing the exam link with other individuals or a group, the individuals or group members must be credentialed in order to view the exam.

To send an exam link within Messaging:

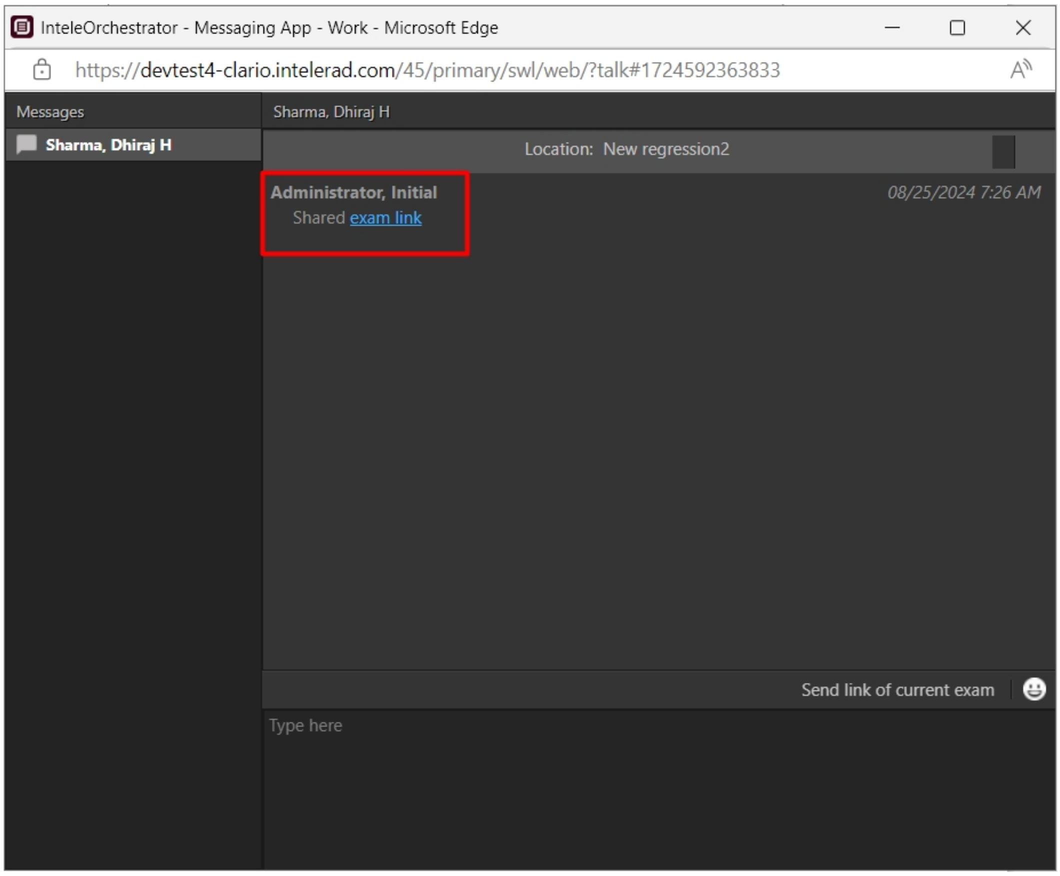
1. Open the exam you want to send a link to.
2. Click the Messaging icon. Select the people you want to send the exam link to. The Messaging App window will open.
3. Click the **Send link of current exam** button.



Whether the exam link will be sent to the users or groups you've added to the message will depend on if those users and groups are credentialed to view the exam.

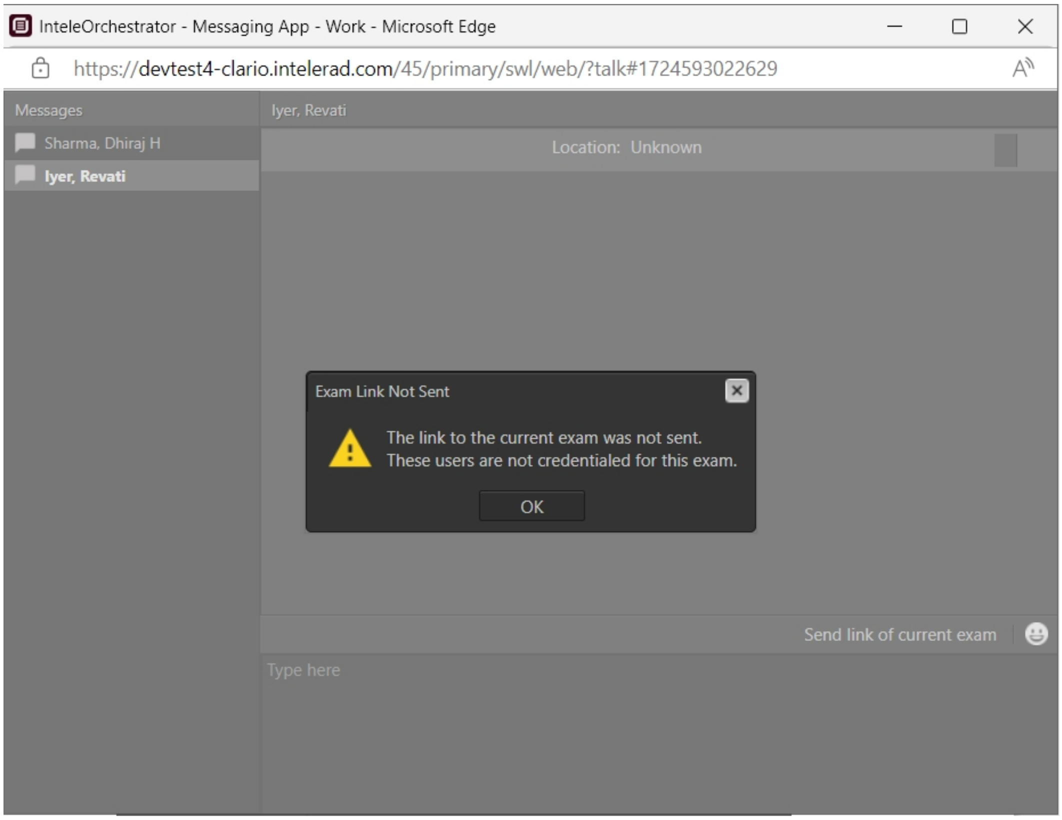
- **All Users are Credentialed**

  If every user in the message is credentialed to access the exam, the message containing the exam link will be sent to all users.



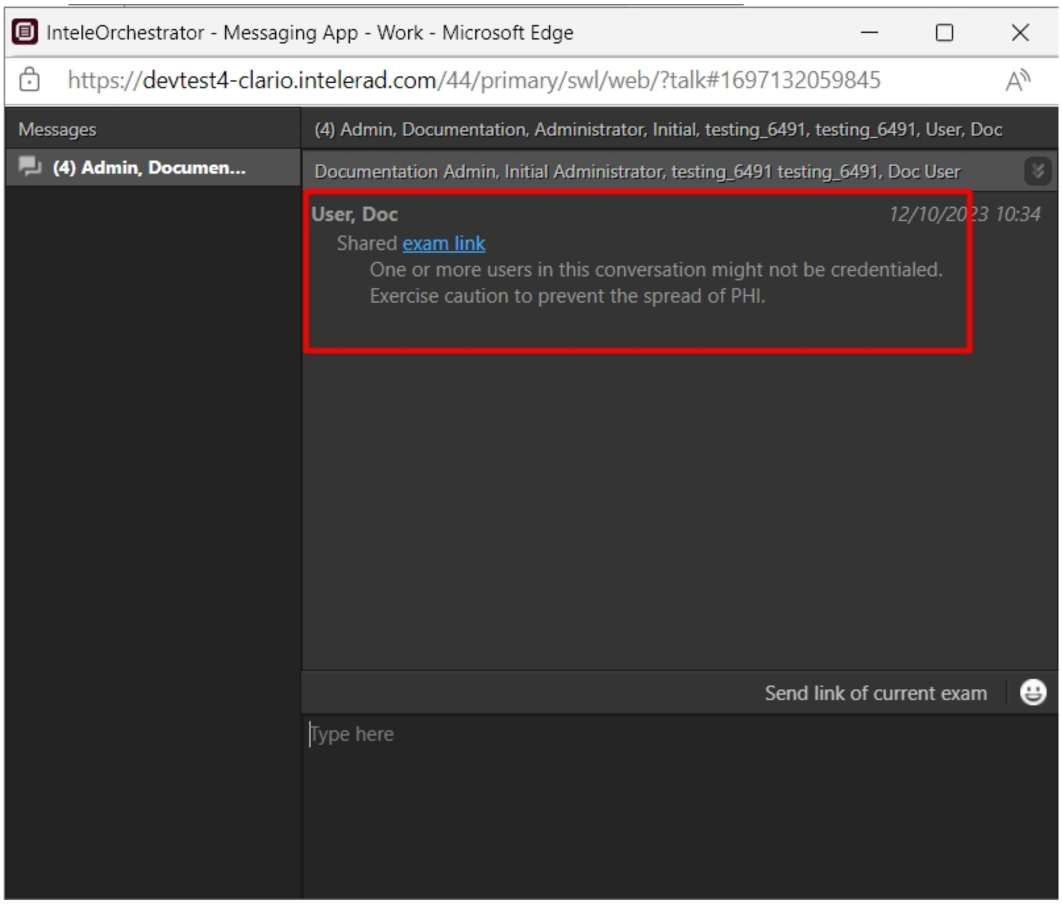
- ## No Users are Credentialed

  In cases where none of the users in the message are credentialed to access the exam, an error message will be displayed, which states: **The link to the current exam was not sent. These users are not credentialed for this exam.**

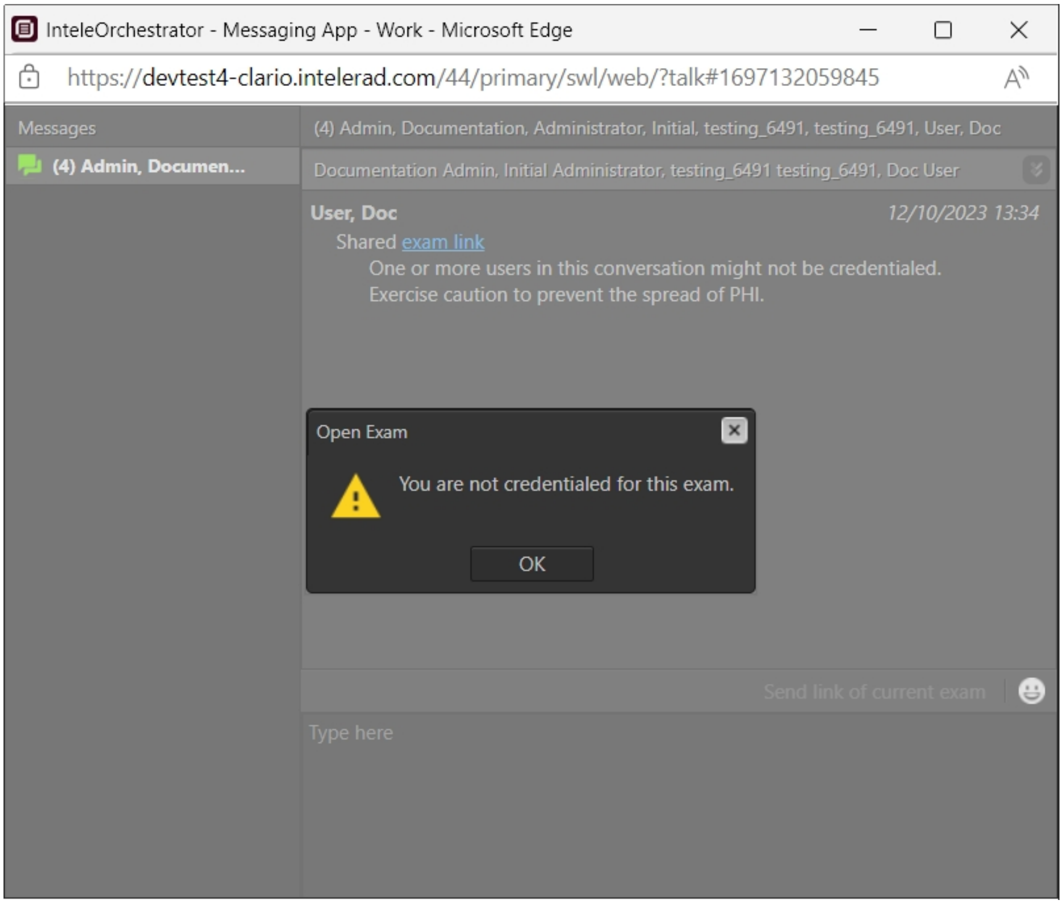


- **Users with Mixed Credentials**

  When some of the users are not credentialed to view the exam, you can send the exam link to the group. However, a warning message will be displayed to the sender and all users within the message, stating: **One or more users in this conversation might not be credentialed.**



Any users without the necessary credentials, attempting to open the exam link will receive an error message: **You are not credentialed for this exam.**


InteleOrchestrator - Messaging App - Work - Microsoft Edge
https://devtest4-clario.intelerad.com/44/primary/swl/web/?talk#1697132059845
Messages
(4) Admin, Documen...
(4) Admin, Documentation, Administrator, Initial, testing_6491, testing_6491, User, Doc
Documentation Admin, Initial Administrator, testing_6491 testing_6491, Doc User
User, Doc
12/10/2023 13:34
Shared exam link
One or more users in this conversation might not be credentialed.
Exercise caution to prevent the spread of PHI.
Open Exam
You are not credentialed for this exam.
OK
Send link of current exam
Type here

6

DICTATION AND REPORTS

InteleOrchestrator Reporting offers a powerful way to use InteleOrchestrator virtually hands-free. Using only your microphone and the speech-to-text functionality, you can open and read exams, then dictate and sign your reports with minimal interaction with your keyboard or mouse. Whether you use this voice recognition functionality or dictate files that are sent to a transcriptionist, InteleOrchestrator makes it easy to dictate reports with report templates and the ability to combine reports or read reports consecutively.

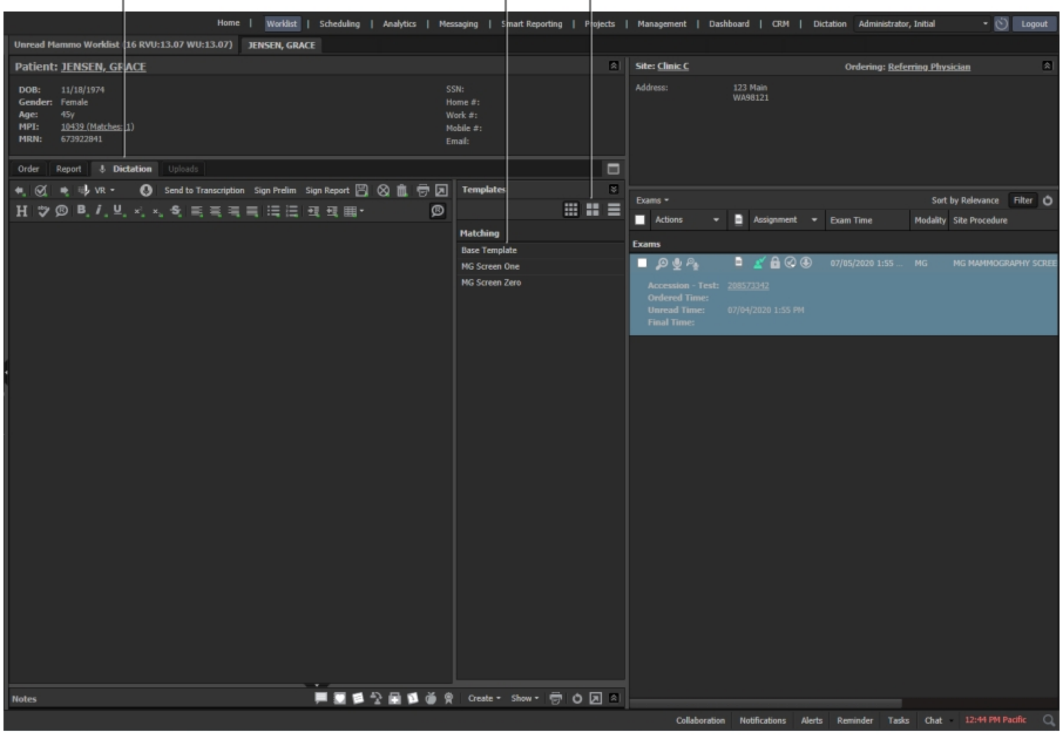
In this chapter:

Dictating Reports

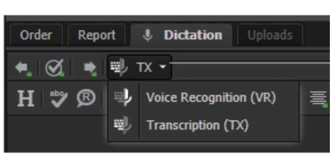
InteleOrchestrator provides users with two methods to dictate reports: dictating an audio file for a transcriptionist, or using InteleOrchestrator "virtually hands-free" navigation that allows you to use speech commands to navigate through InteleOrchestrator and your report, and dictate your findings directly into the fields of the report template you select.

To dictate a report:

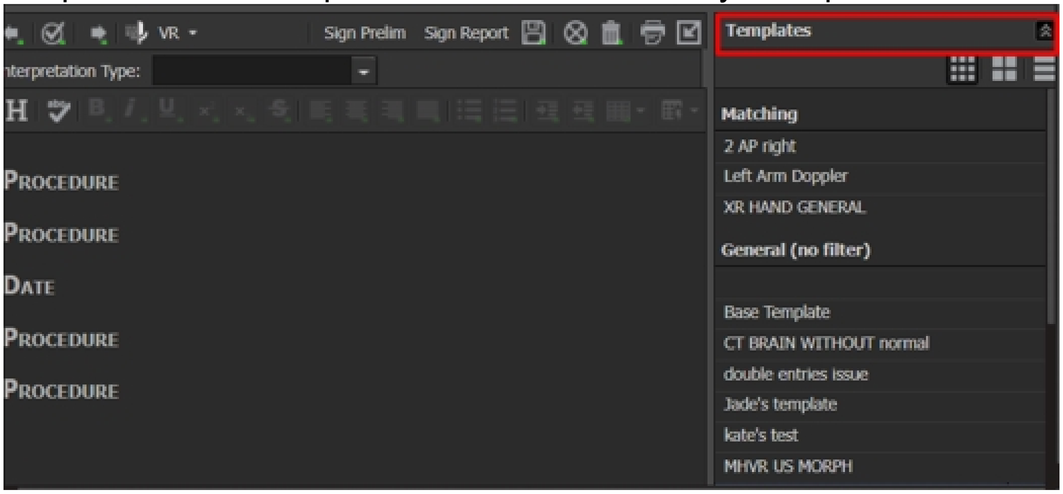
1. Open an exam in dictation mode. See "Opening Exams" (page 95)
2. In the Reports area, click the **Dictation** tab.



3. Under the Dictation tab, select either Voice Recognition (VR) or Transcription (TX) as your Dictation mode.



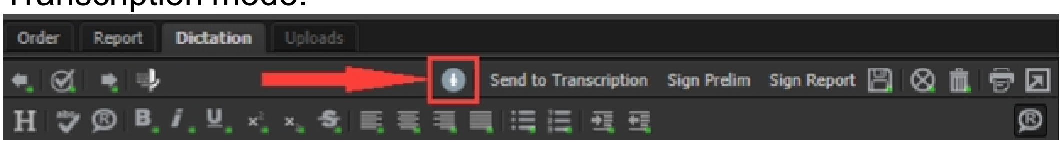
4. From the list of templates in the Template column, select a mapped template or a template structure to provide the framework for your report.



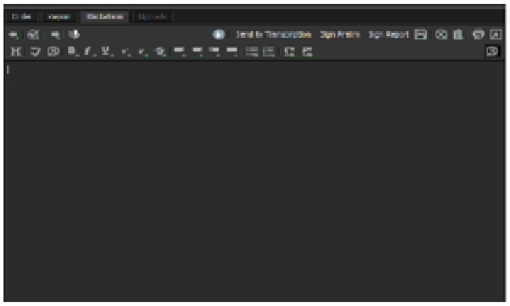
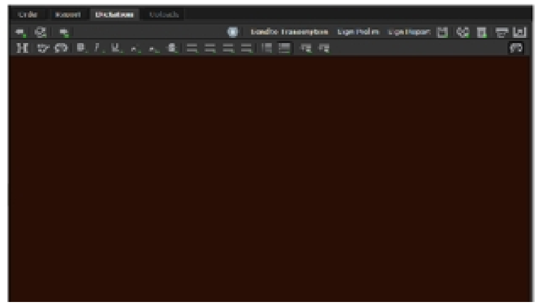
Whether you choose a mapped template or one of the template structures is a personal preference. The template structures can provide some or no structure, guiding you to dictate "free-form" if you wish, while the templates will have distinct fields to enter data into.

5. Do one of the following:

   - Press the button on your microphone that you configured to start dictating the report in Voice Recognition mode. See “Configuring Dictation Microphone Buttons to Perform Commands" (page 179).
   - In the Reports section, click **Start Recording** to start dictating the report in Transcription mode.



If you are using the Transcription mode, the background of the dictation area will change to a dark red background with a light red border to indicate that the microphone is active and audio is being recorded. The recording time indicator updates after you stop recording.

6. Dictate your findings into either the report fields or your transcription file.

   ⚠ If you discover a critical finding that requires immediate action at any time during your dictation, you can click **Sign Prelim** button to create a preliminary report that can be acted on immediately.

7. Do one of the following to finish your report:

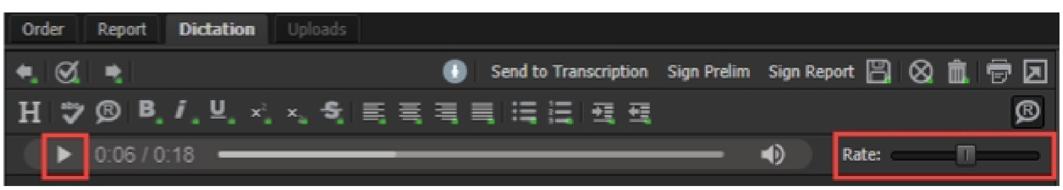
   - For Voice Recognition Mode:

     a. Press the button on your microphone that you configured to stop recording.
     b. Press the button on your microphone that you configured to sign the report, use the voice command to sign the report, or click **Sign Report**.

   - For Transcription Mode:

     a. Click **Stop Recording** .

     The recording time indicator appears or updates. You can now review and add to the dictation, and change the playback speed and volume.



b. When you are ready, click **Send to Transcription**.

There is a series of icons across the top of the Report Area you can use to stop your dictation, or interact with your reports in other ways. The following table explains the icons available and when to use each one.

Action	Icon	Reason for use
Save Report		This saves all of the data you have added to the report, and closes the exam. The exam stays assigned to you. You can open it to continue your reporting by clicking the **Dictation** module in the InteleOrchestrator menu and opening the report from your list of exams.
Cancel Report		This removes all of the changes you have made to the report since it was last saved and closes the exam. The exam stays assigned to you. You can open it to continue your reporting by clicking the **Dictation** module in the InteleOrchestrator menu and opening the report from your list of exams.
Discard Report		This discards all changes you have made to the report, closes the exam, and releases the exam to the queue for someone else to read.
Print Report		This prints the report.
Pop out Report Editor		This expands the Report Editor to its own window. This can work in conjunction with the Profile Management setting to keep the InteleOrchestrator Dictation Window Topmost. Setting this preference will keep the dictation window on top of any other applications you have open, and should prevent your system from losing focus while you are dictating your findings.

Combining Reports and Reading Reports Consecutively

If a patient has multiple unread exams, you can configure InteleOrchestrator to prompt you to combine those exams or read them consecutively. While you can combine exams or choose to read them consecutively from the Patient View at any time, configuring this prompt can help you find exams that may not be visible on your worklist. Here are some examples why you might choose to enable these prompts:

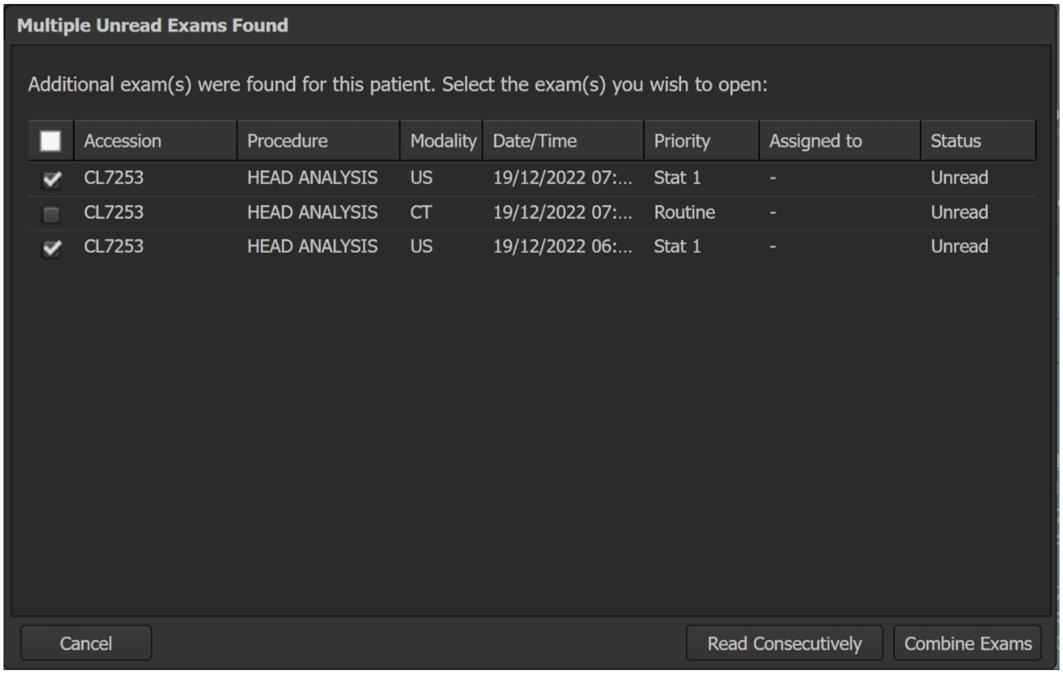
- If your patient has an exam that could be combined with your current exam, InteleOrchestrator will prompt you when you open the exam to determine if you want to combine your current exam with one or more exams that share the same subspecialty or body part, for example. Additionally, your practice may have InteleOrchestrator configured to automatically combine exams based on specific criteria. This configuration will be done by the system administrator. For more information on the configuration, please contact your system administrator
- If your patient has multiple exams that could logically be read consecutively, InteleOrchestrator can ask you if you want another of these patient exams after you finish reading your current exam.

To combine exams from the prompt:

1. If you have not done so already, verify that you have enabled combinable and/or consecutive reports in Profile Management. See “Enabling Combinable or Consecutive Reports" (page 71).
2. Open an exam. See “Opening Exams" (page 95)
3. In the Multiple Unread Exams Found dialog, click the exams you wish to combine or read consecutively.
4. Do one of the following:
    - Click **Read Consecutively** to open the selected exams one at a time after you finish reading the current exam.

      To read exams consecutively, you must use the Auto-Next feature. See “Using Auto-Next" (page 99)

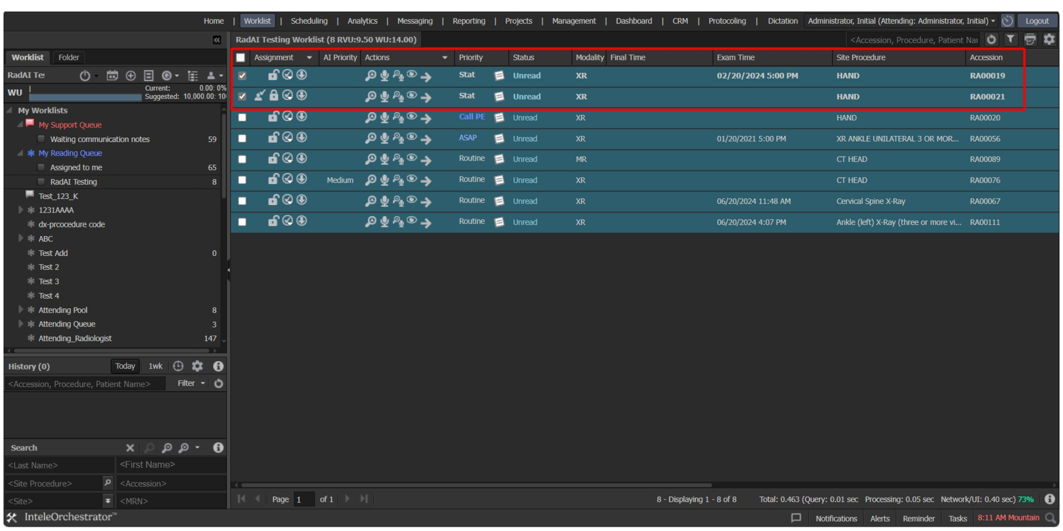
    - Click **Combine Exams** to combine the selected exams and open them together in an image viewer and reporting application.



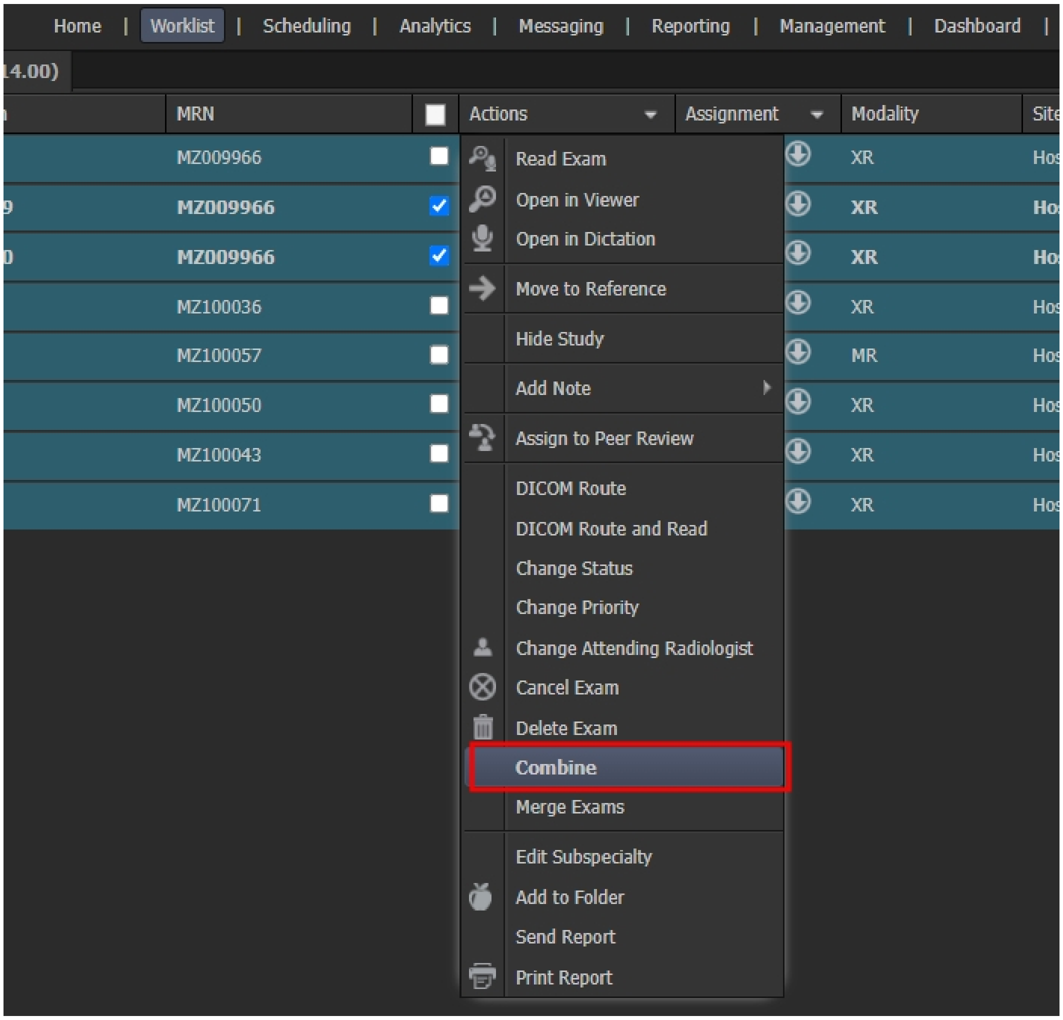
You will not have the option to deselect the exams with the same modality once they are automatically combined.

To combine exams from the Worklist:

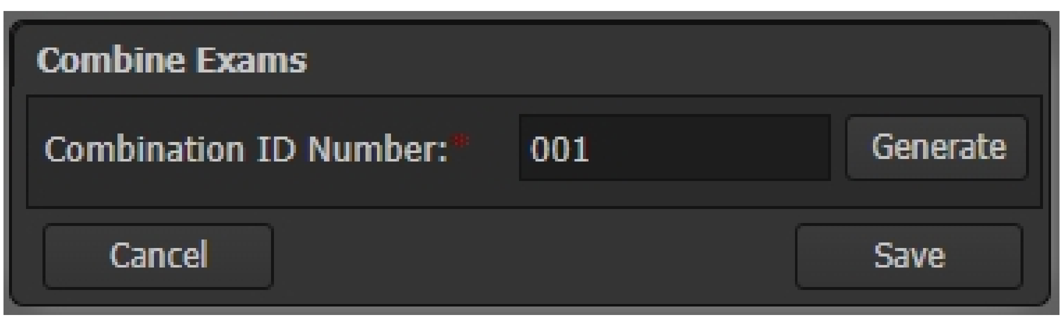
1. Open an exam. See "Opening Exams" (page 95)
2. In the Worklist area, select the exams you want to combine.



3. Click the drop-down arrow in the Actions column at the top of the Worklist area.
4. Select **Combine**.



5. In the Combine Exams dialog, click **Generate** to generate a combination ID number.

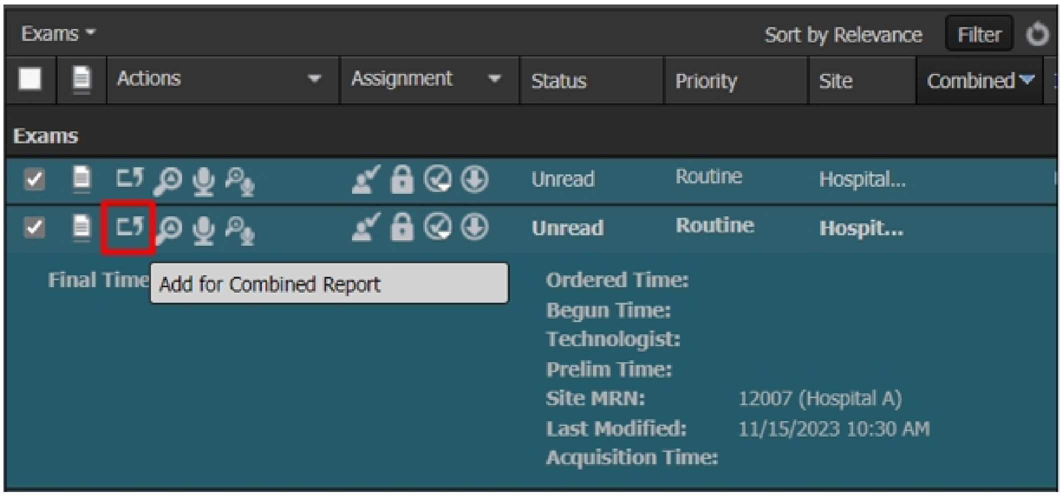


6. Click **Save**.

To combine exams from the Patient View:

When the exam is already open in the Patient View and the user wants to add more exams to the report, the combined report icon is used.

1. Select the exams you want to combine in the Exams area of the Patient View. See “Understanding the Patient View" (page 25) for information about the Exams area.
2. Click the **Add for Combined Report** icon in the actions column to combine the selected exams.



3. If you haven’t already, launch the viewer to see the exams for the combined report.

The exams will be combined only if they are opened in dictation mode.

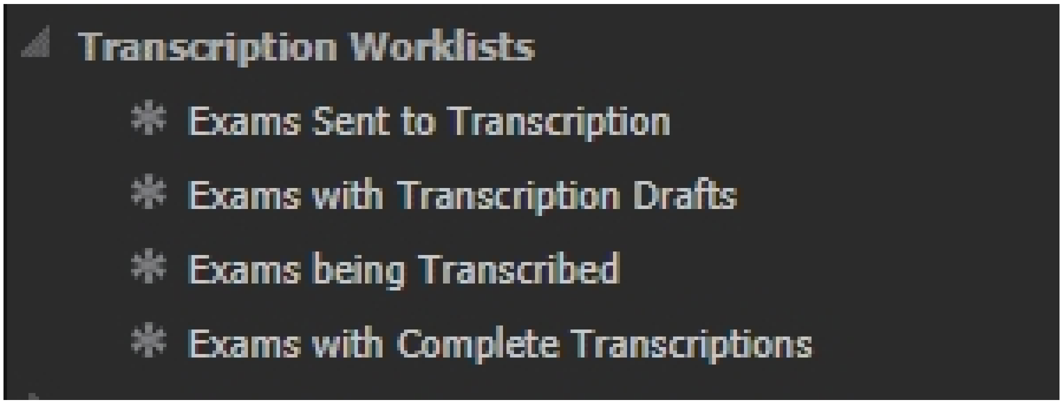
Changing a Dictation File After Submission for Transcription

If you need to make a change to a dictation after you submitted it for transcription, you open the report and append new audio to the transcription file. If your InteleOrchestrator administrators have allowed access to the Transcription worklist, you may also retrieve exams from the Exams Sent to Transcription worklist.

Once the transcriptionist opens an exam and begins transcribing, you can no longer edit the dictation.

To change a dictation you have already submitted for transcription:

1. Search in your exam History or Exams Sent to Transcription worklist to find the exam you want to edit. See “About the Worklist Column" (page 21) for more details on the exam History section.



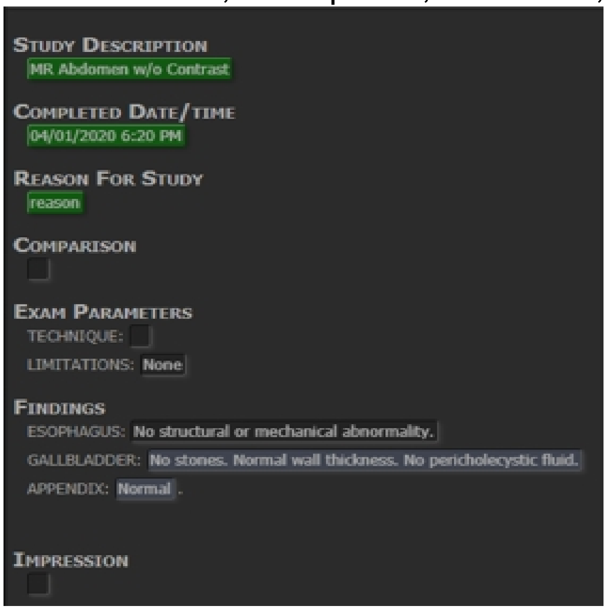
2. Open the exam in dictation mode. See “Opening Exams" (page 95).
3. Add dictation to the file.
4. Click **Send to Transcription** to resubmit the appended file to the transcriptionist.

Template Structure Levels

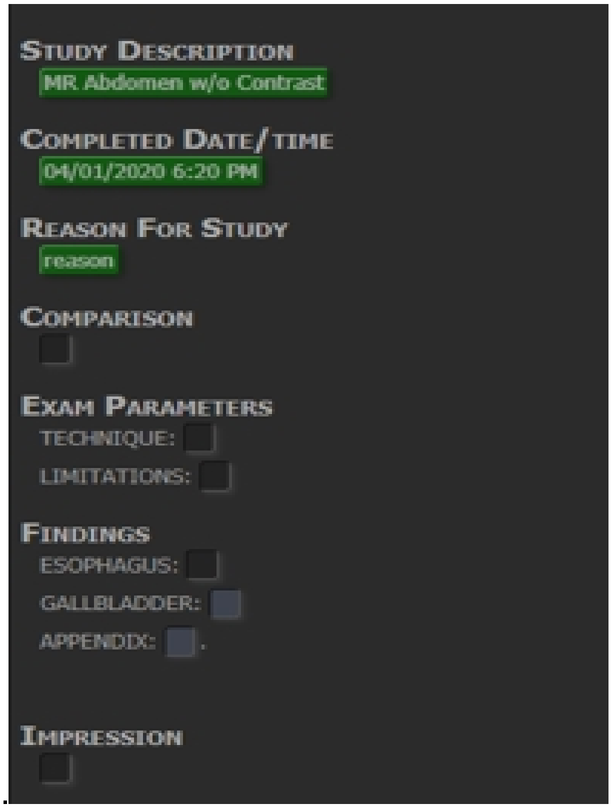
Reporting offers three levels of report structure. The icons for these are located at the top of the report window just below the template header. The three options are Structured Template, Less Structured Template, and Narrative Mode.

These options can be utilized on any template once it has been loaded into the report editor. Select the appropriate structure level by either selecting it manually or using the respective voice command to select it.

- **Structured Template -** Utilizes the entire original template as it was created. It included fields, field options, auto fields, and default text.

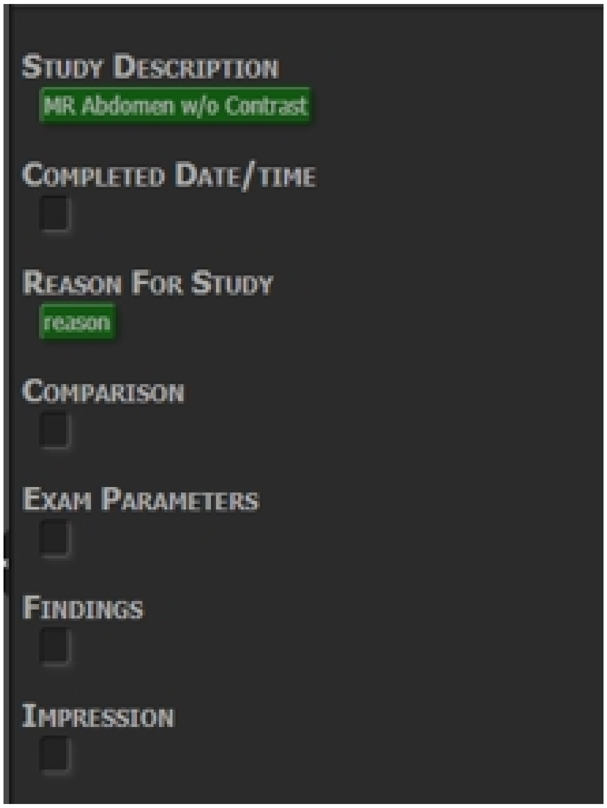


- **Less Structured Template -** This option removes the default field option text from the report editor. However, the field options remain available when the respective field is selected



.

- **Narrative Template -** This option removes all field options and default text from the report editor. It only has auto fields and a single blank field within each section for navigation and to provide dictation.



InteleOrchestrator Speech Commands

If your organization purchased InteleOrchestrator, you can use speech-to-text technology to navigate within InteleOrchestrator and dictate your reports. This allows you to work virtually hands-free for the entire time you are reading your exams. The following commands are configured by default.

These speech commands can be configured by your InteleOrchestrator system administrator, so the commands you use may be different. Contact your InteleOrchestrator system administrator to get new speech commands.

Dictating Commands

The Dictating commands are used when dictating a report. Simply speak the command run the associated action.

Action	Spoken Command
Select a template	"Load [name of template]"
Insert structured template	"Structured template"

Action	Spoken Command
Insert less structured template	"Less structured template"
Insert narrative template	"Narrative template"
Insert a macro	"Insert [name of macro]"
Select option from pick list	"Select [option]"
Begin a new line in the report	"New line"
Go to a different field	"Go to 'field name'" (ex. "Go to 'Reason for Study'"
Save the report as a draft	"Save report"
Finalize the report	"Sign report"
Sign a prelim	"Sign prelim"
Cancel any edits you were making to a draft or prelim	"Cancel report"
Delete or discard your report	"Discard report"
Delete your last statement	"Delete that"
Go to previous field	"Go to previous"
Go to next field	"Go to next"
Agree to default text	"Agree"
Agree to default text and go to next field	"Agree and next"
Cancel the dialog	"Cancel"
Clear the dialog	"Clear"
Highlight your last statement	"Select that"
Highlight the entire report	"Select all"
Make text bold	"Format bold"
Make text italicized	"Format italics"
Make text underlined	"Format underline"
Add a superscript	"Format superscript"
Add a subscript	"Format subscript"
Strikethrough	"Format strikethrough"
Align left	"Format left"
Align right	"Format right"

Action	Spoken Command
Align center	"Format center"
Fit text to window	"Format justify"
Create bullet points	"Format bullets"
Create numbers	"Format numbering"
Indent a line	"Format indent"
Outdent a line	"Format outdent"
Add a template remark	"Add template remark"
Insert dates for today, yesterday, tomorrow, now	"Date [date option]"
Save	Save
Save report	"Save report"
Submit	"Submit"

Worklist Commands

There are commands to navigate worklists. Simply speak the command run the associated action.

Action	Spoken Command
Launch Auto-Next	"Start reading"
Pause Auto-Next	"Pause reading"
Resume Auto-Next	"Resume reading"
Stop/Exit Auto-Next	"Stop reading"
Read first exam on the worklist	"Read first exam"
Refresh worklist	"Refresh my worklist"
Search accession	"Search accession"
Search first name	"Search first name"
Search last name	"Search last name"
Search history	"Search history"
Search MRN	"Search M R N"
Search site	"Search site"
Search site procedure	"Search site procedure"

Action	Spoken Command
Search submit	"Search submit"
Search worklist	"Search worklist"

Notes Commands

There are commands to create the most common notes in exams. Simply speak the command to run the associated action.

Action	Spoken Command
Add a communication note	"Create comm note"
Add an exam note	"Create exam note"
Add a patient note	"Create patient note"

Configuring Dictation Microphone Buttons to Perform Commands

InteleOrchestrator supports the use of several dictation microphones and USB headsets. See the *Intelerad Workstation and Accessories Guide* on the Intelerad Service Portal for a full list of supported microphones.

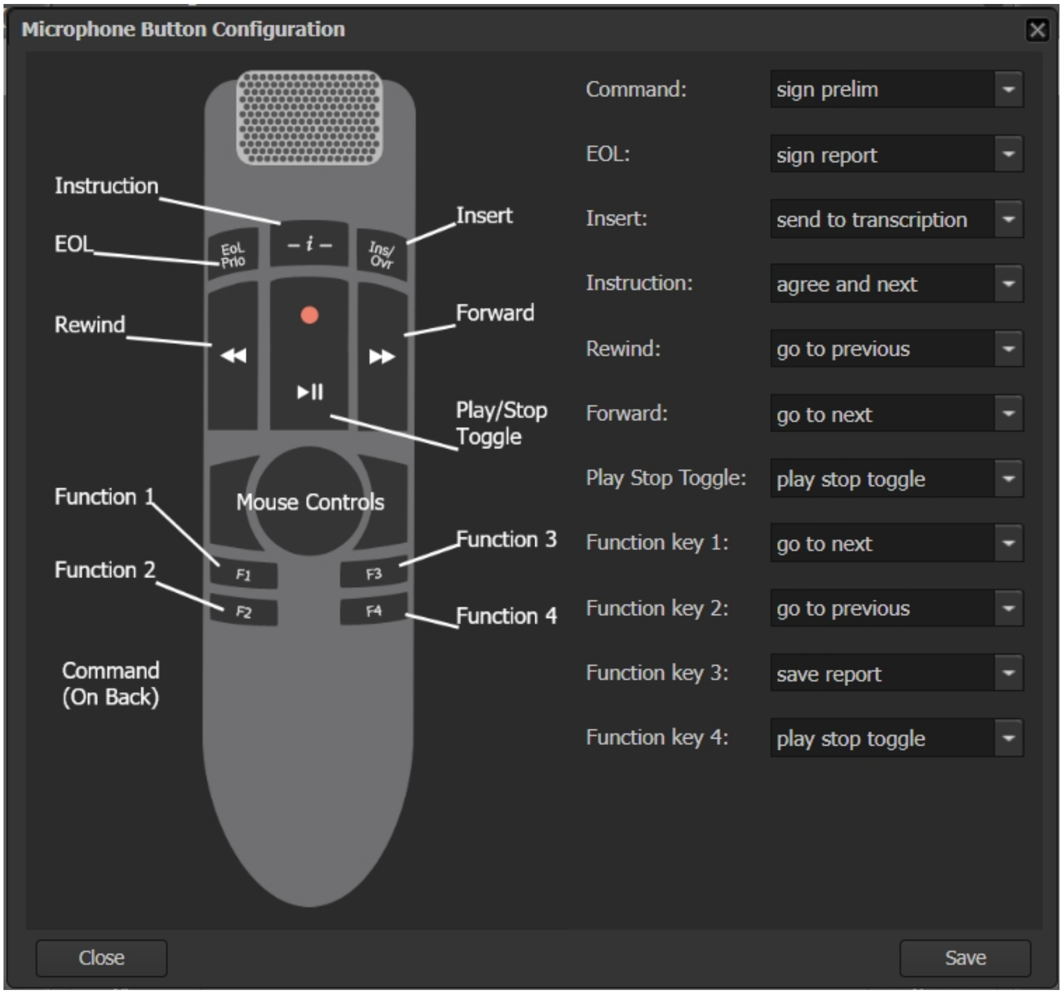
The following configuration options apply to Phillips, Olympus, and Nuance dictation microphones only.

You can configure the handset buttons on your microphone to perform different commands, based on your preference. This feature enables you to read your exams, navigate between auto-text fields, and dictate and sign your reports with minimal interaction with your keyboard or mouse.

To configure handset buttons:

1. Click your user name in the top right corner of the interface, and then select **Profile Management**.
2. In the **Reporting Preferences** section, click **Configure**.

3. In the **Microphone Button Configuration** dialog, for each button, select the associated command.



4. Click **Save**.

7

PROTOCOL WORKFLOW

InteleOrchestrator provides the protocol requests as a worklist of orders requiring protocoling directly in your worklist. These exams are identified from order status from the HL7 message or by special handling rule setup in InteleOrchestrator.

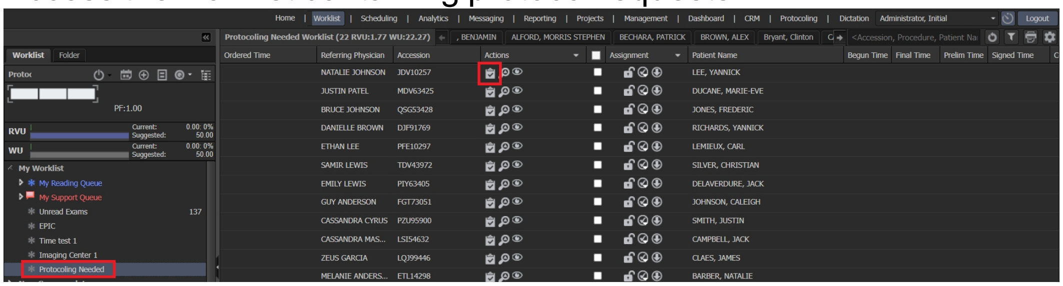
In this chapter:

Opening Exams

From the worklist of orders requiring protocoling, you can open an exam. The exam will open in protocoling mode.

To open an exam:

1. Access the worklist containing protocol requests.



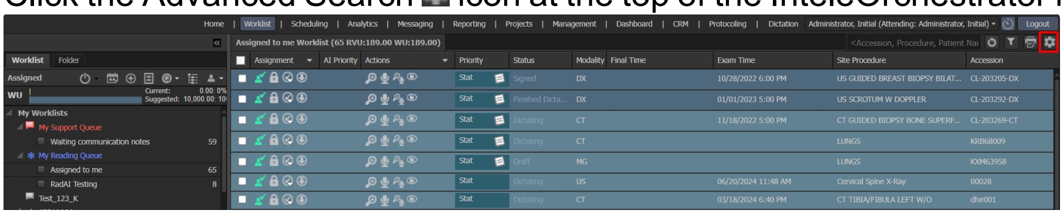
2. In the Action Column for the required exam, click to open the exam for protocoling only.

Performing an Advanced Search

If the desired exam is not in your worklist, you can perform an advanced search to find an exam outside your worklist or with advanced search criteria. The results of your search appear in the work area.

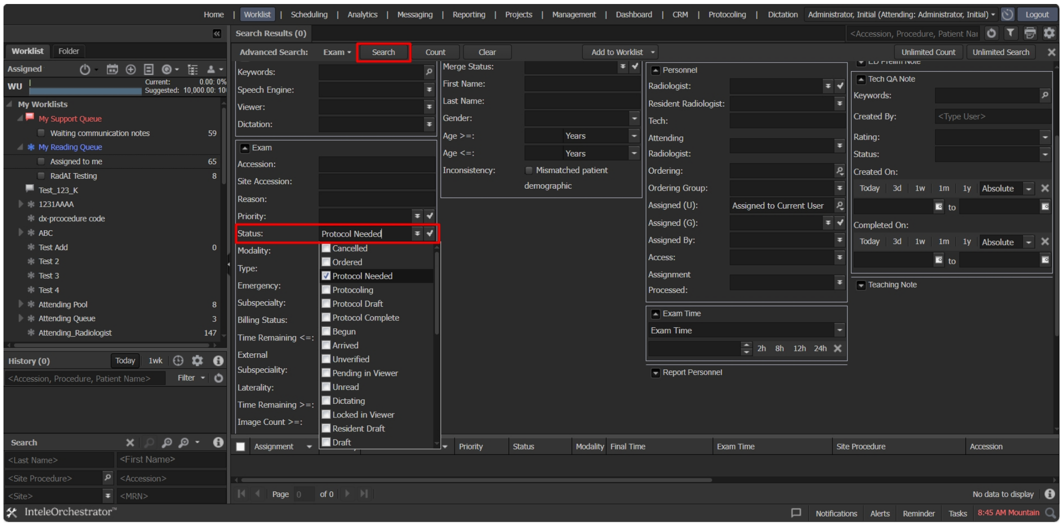
To perform an advanced search:

1. Click the Advanced Search icon at the top of the InteleOrchestrator interface.



2. In the Advanced Search dialog, enter the data you want to search for from the exams.

   For example, if you want to find all protocols that need exams, select Protocol Needed from the drop-down menu in the **Status** field.



InteleOrchestrator automatically limits the date range to within 3 days unless you specify a date range.

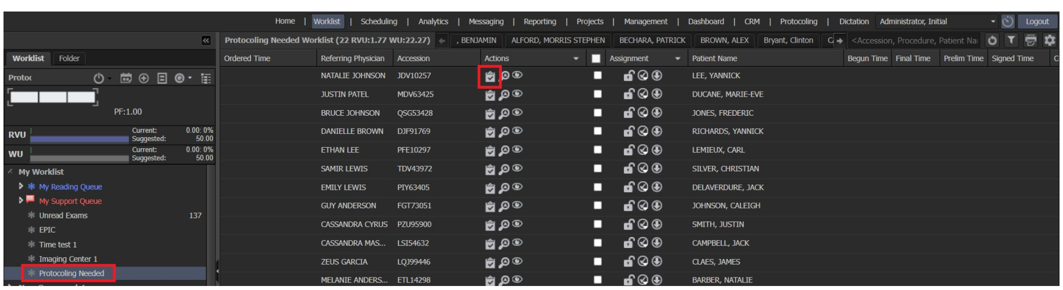
3. Click **Count** to see how many results your search criteria returned. [Optional]
4. Click **Search**.
5. Select the desired exam in the list of exams returned from your search.

Understanding the Protocol Workflow

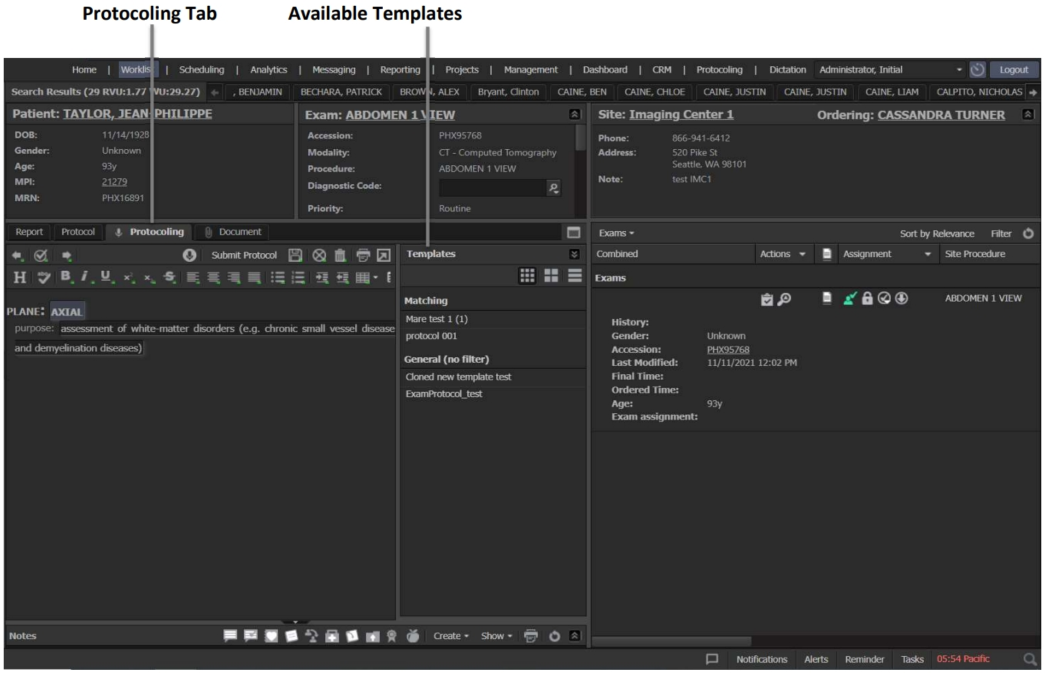
This section provides the different steps to be followed to protocol an exam.

To protocol an exam:

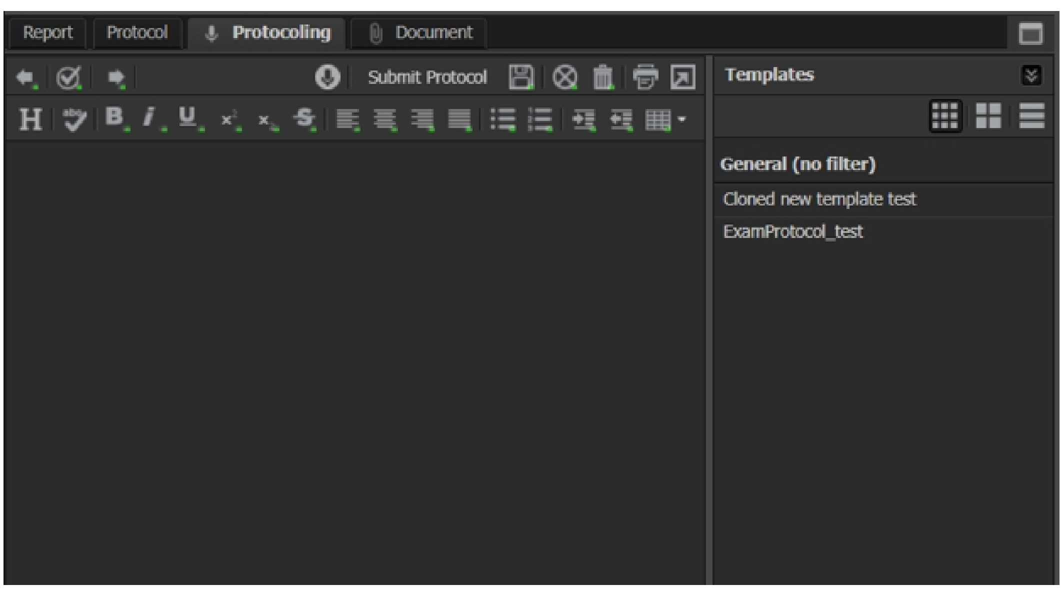
1. If an exam is not opened then open an exam in protocoling mode using the steps as provided in the “Opening Exams" section.



2. The Protocoling tab in patient view will be displayed. From the list of templates in the Template column, select a template to provide the framework for your Protocol. Templates will be shown based on system administrator configuration.



3. Click in a field to edit the text or you can use Voice Recognition mode. Click **Start Recording** to start dictating. For more information, see [Configuring Dictation Microphone Buttons to Perform Commands].



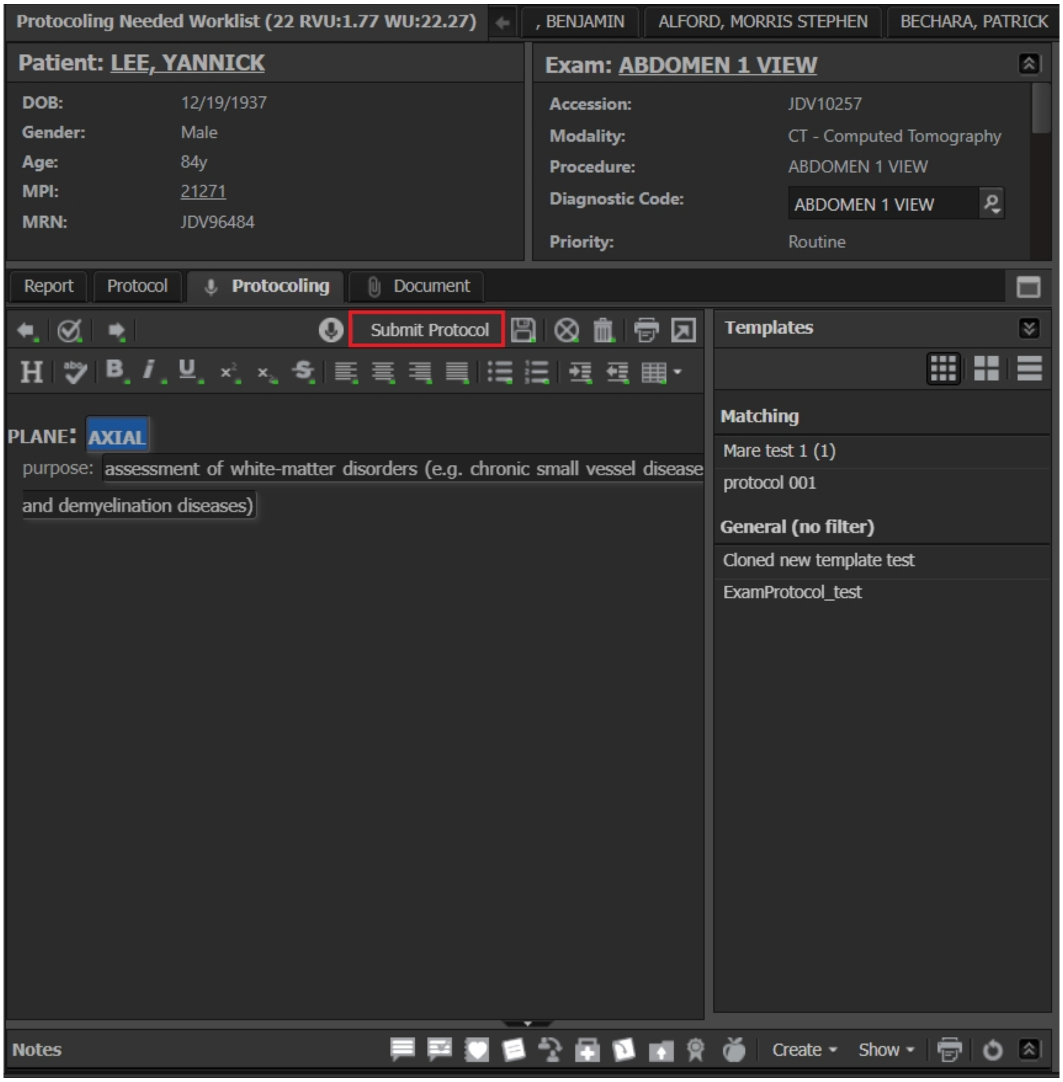
4. Select an icon to interact with your protocol in other ways. The following table explains the icons available and when to use each one.

Action	Icon	Description
Save Report		This saves all of the data you have added to the protocol, and closes the exam. The exam stays assigned to you. You can open it to continue your protocoling by opening the Protocol from your list of exams.
Cancel Report		This removes all of the changes you have made to the protocol since it was last saved and closes the exam. The exam stays assigned to you. You can open it to continue your protocoling by opening the Protocol from your list of exams.
Discard Report		This discards all changes you have made to the protocol, closes the exam, and releases the exam to the queue for someone else to read.
Print Report		This prints the protocol.
Pop out Report Editor		This expands the Protocol Editor to its own window.

5. When you click the save icon for an edited protocol, the protocol will be saved as a draft. Similarly, if you start to edit a protocol and click out to a worklist, the protocol will be saved as a draft.

   If you are not sure which worklist contains your draft protocol, contact your system administrator.

6. When you are finished with the protocol, Click **Submit Protocol**



7. The protocol will be sent to your RIS or EMR based on rules defined by your system administrator.

8

DOCUMENT VIEWER

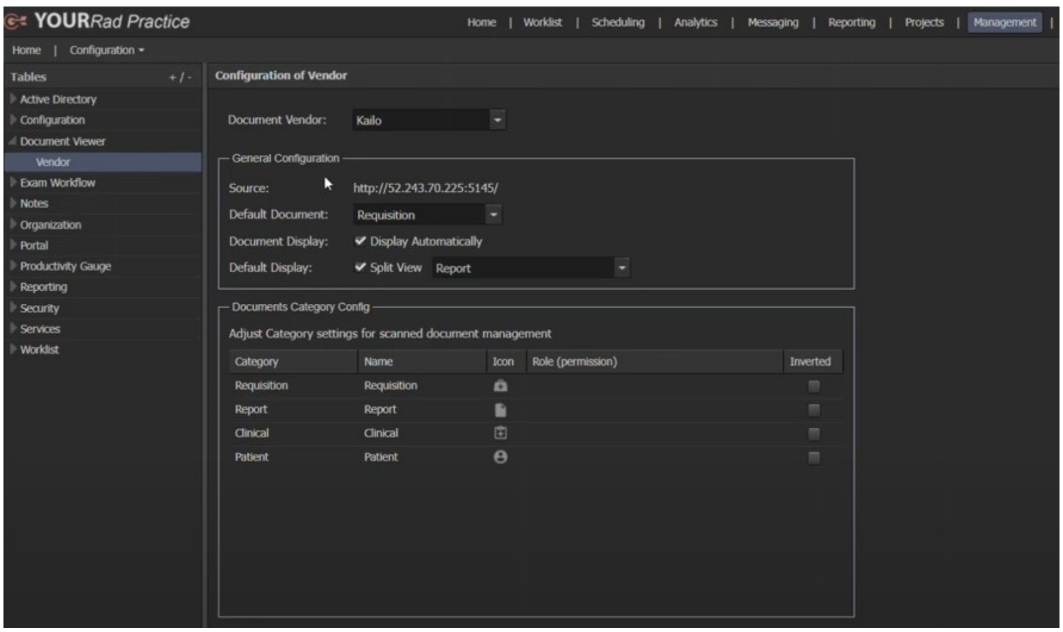
InteleOrchestrator offers a powerful way to view documents directly within the InteleOrchestrator Patient View. This feature allows InteleOrchestrator users to view documents easily when they may be reading from disparate systems where documents are not reliably stored in the same place.

In this chapter:

Verify your Document Viewer Configuration Settings

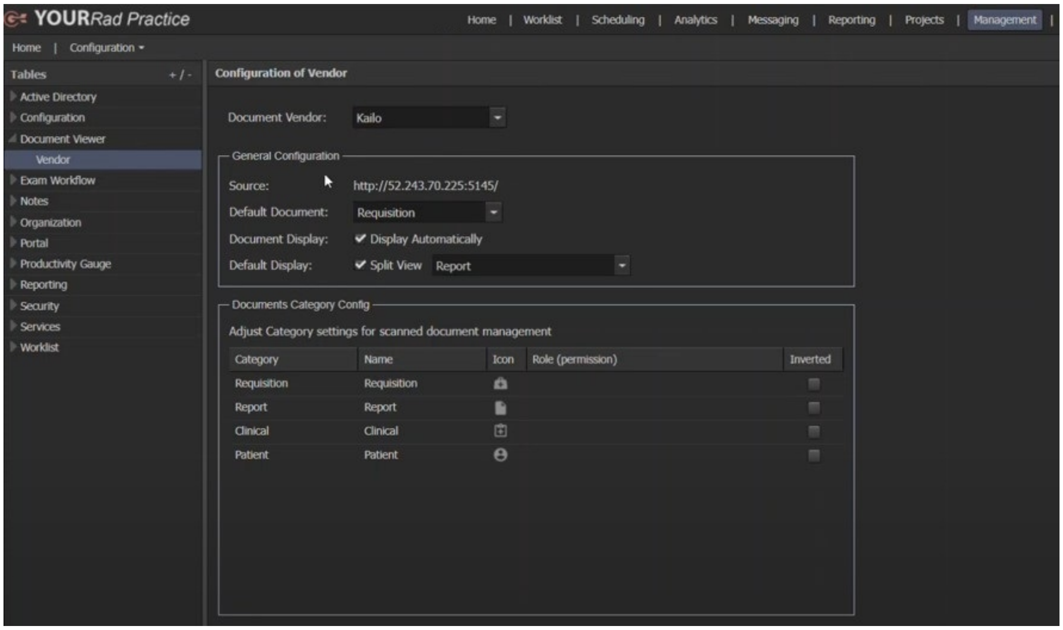
To ensure that the following document viewer settings are enabled:

1. Open a web browser session, and go to the InteleOrchestrator URL.
2. Log in to InteleOrchestrator.
3. From the InteleOrchestrator menu at the top of the interface or from the list of icons, click **Management**.
4. Click **Configuration**.
5. Set the Document Viewer preferences to customize the behaviour of the Document Viewer.



Document Viewer Preferences

Set the Document Viewer preferences to customize the behaviour of the Document Viewer.



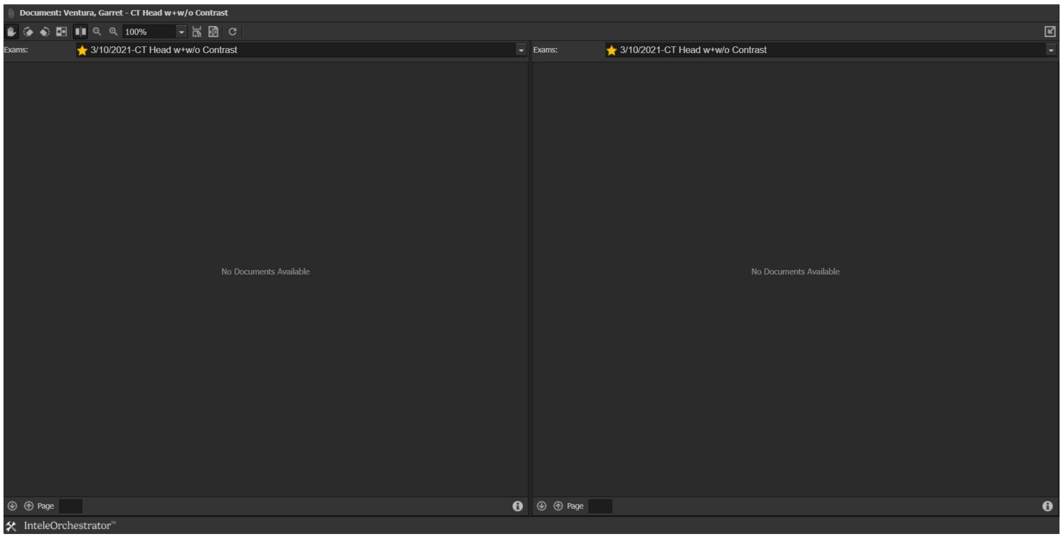
General Configuration

This section is about the configurations specific to vendor.

Default Document – The document type that is displayed upon entering the Document tab in Patient View.

Document Display – When you enable this option and you open an order, the Document Viewer automatically opens and displays the scanned documents that are associated with that order.

Default Display - When you enable this option and you open an order, the display will be in split view and the document specified in drop down will be displayed in the second window.



Documents Category Configuration

This section is about the configurations of each individual document category applies the preferences described below only when you open new orders. These preferences do not affect orders that you have already opened.

Category – Type of documents which are supported.

Name – Ability to rename document type in application.

Icon – Upload different icon for the document type.

Role – Users associated to specific roles are configured in order to have access to that document type.

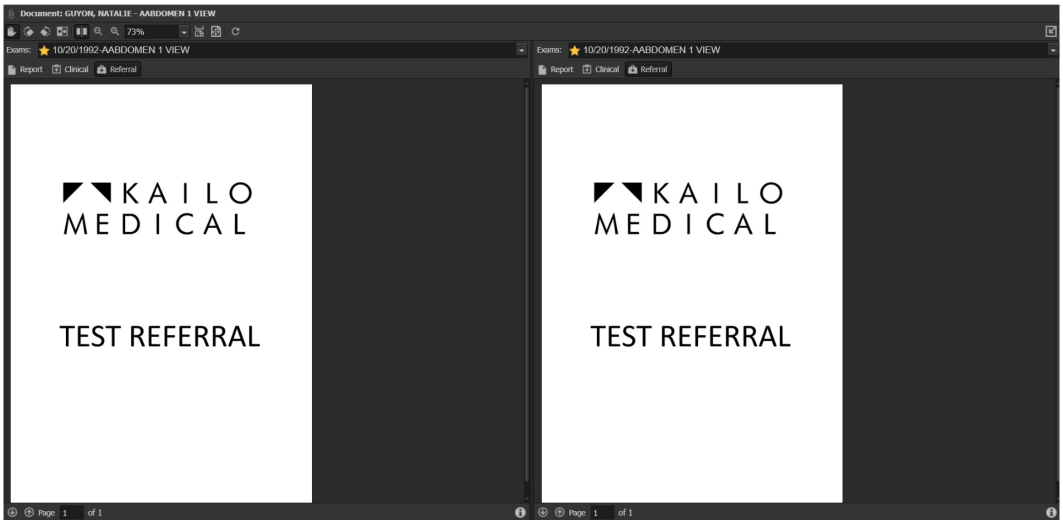
Inverted – Reverses the colors of a scanned document. For example, black text appears white, and a white background appears black.

Viewing Scanned Documents

In the Document Viewer, you can view scanned documents that are associated with an order, such as requisitions and reports stored in RIS. You can also view the scanned documents for all priors associated with the current order.

To use this feature, ask your administrator to enable the Documents Display privilege in your user account.

You can set the Document Viewer to display only documents of specific types, such as REQUISITION and REPORT. If you would like to limit the type of documents that appear in the Document Viewer, have your administrator contact Intelerad Technical Support to filter out the unwanted document types.

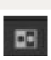
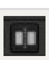


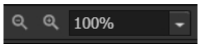
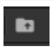
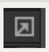
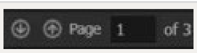
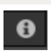
In the Document Viewer, you can view Adobe Portable Document Format (PDF) files and scanned documents saved as the following image files:

- PNG
- JPEG
- BMP
- GIF
- TIFF (including multipage TIFF)

For unsupported document types it will show up as a download link.

You can use the following tools to manipulate scanned document:

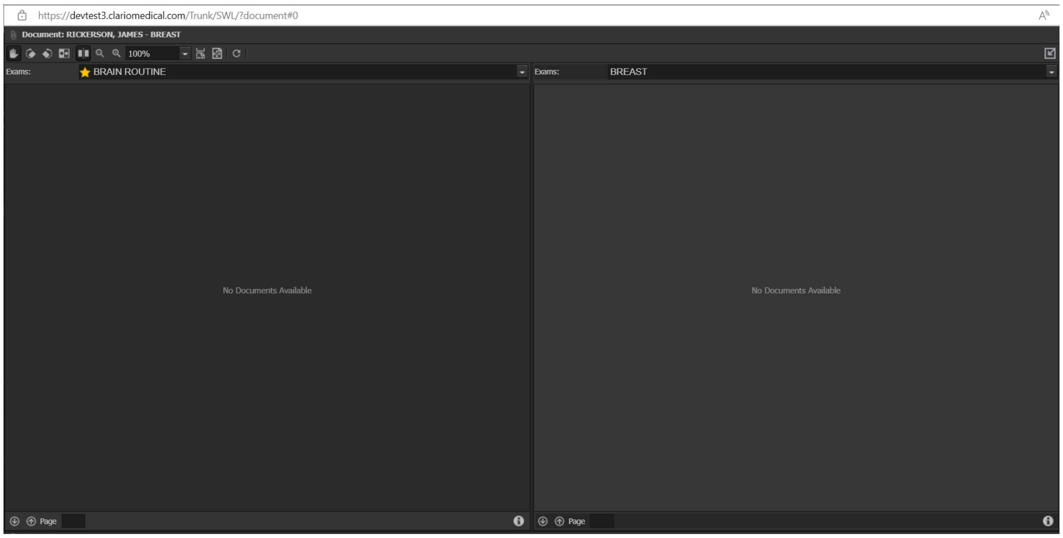
Click :	To:
	Pan around the document when it is larger (zoomed in) than the viewport available.
	Rotate the current page left or right in 90-degree increments.
	Inverts the text and background colours for the document.
	Switch between the single and split screen views for the scanned docs.

Click :	To:
	Choose the magnification of the documents: Fit Page (default), Fit Width, Fit Height, Actual Size, 50%, 150%, or 200%.
	Auto fit the document to the width of the screen.
	Auto fit so the entire document is visible in the screen.
	Revert the documents to their original magnification, orientation, and colour settings.
	Retain the function of uploading scanned docs to an exam, however we'll move that function from the 'file uploads' note to the Scanned Docs tab toolbar. The actual 'note' or upload window that pops up should remain the same.
	Pop the scanned document viewer into a separate browser window (existing functionality).
	Switch between documents in the scanned document viewer.
	Pager if document contains more than one page.
	Information tooltip to provide more information on document.

To view scanned documents:

1. From the worklist or the Search tool, open the order that contains the scanned documents that you want to view. If you have your Document Viewer preferences set to open the Document Viewer automatically, the Document Viewer appears when you open the order.
2. To view the scanned document, click a document thumbnail.
3. To navigate between pages in a multi-page document, use the navigation arrows underneath the scanned document. If the Zoom mode is set to Fit Page, you can use the mouse wheel to scroll between documents or between pages in a multi-page document.
4. To manipulate the scanned document, use the tools in the Document Viewer.
5. To view scanned documents into a separate browser window, click the Pop-out Document icon in the top right corner of the document viewer window. The scanned

documents which open in a separate window helps the users logout sessions.



6. To close the Document Viewer window, click the “x” button in the top right corner of the window. To reopen the Document Viewer, click Show Scanned Documents in the Patient Record tab.

9

PEER REVIEW WORKFLOW

The Peer Review Workflow is an essential component of a comprehensive radiology department quality assurance program. The Peer Review Workflow provides a useful mechanism for evaluating the diagnostic accuracy of the radiologist's reports. InteleOrchestrator can be configured for Peer Review workflows, providing greater efficiency and accuracy in the interpretation of reports.

In this chapter:

Peer Review Workflow

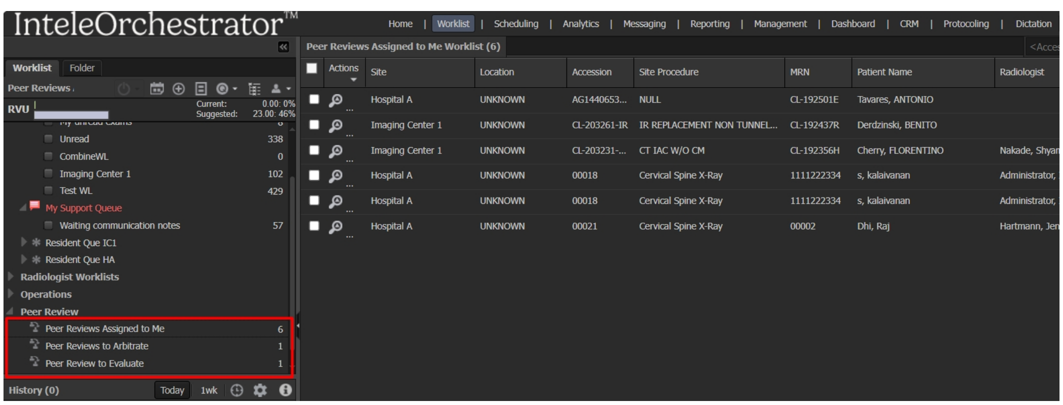
The Peer Review Workflow is an essential component of a comprehensive radiology department quality assurance program. The Peer Review Workflow provides a useful mechanism for evaluating the diagnostic accuracy of the radiologist's reports. InteleOrchestrator can be configured for Peer Review workflows, providing greater efficiency and accuracy in the interpretation of reports.

About the Peer Review Worklist

The Peer Review Worklist displays cases assigned to the radiologist for Peer Review. The Peer Reviews are assigned based on the rules setup by the Peer Review Administrators.

These are the peer review worklists that the system will show by default if Peer Review is configured. These worklists can be customized by your system administrator:

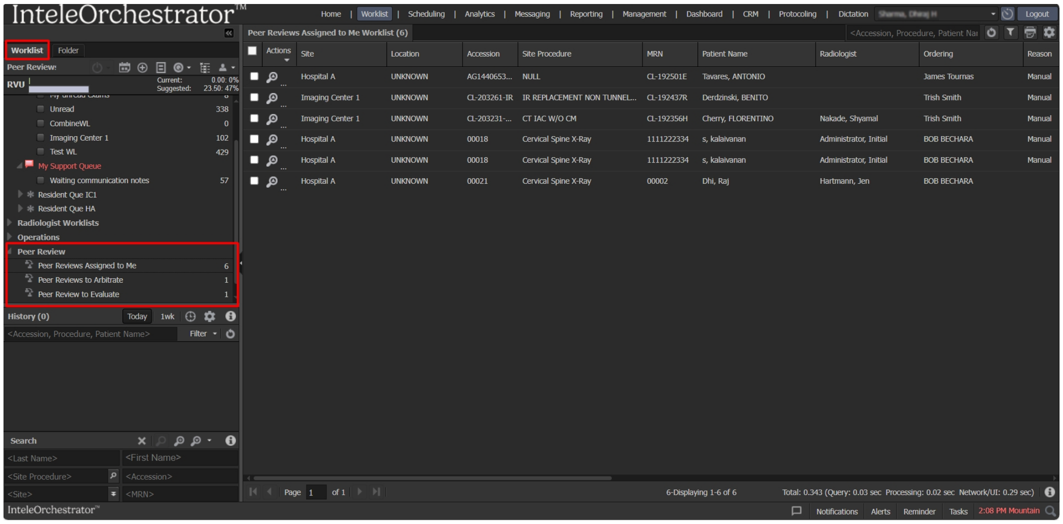
- Peer Reviews Assigned to Me – Peer reviews in a pending status that are assigned to the current user.
- Peer Reviews to Evaluate – Reports that have been peer reviewed by another colleague that the current user needs to review and potentially take action.
- Peer Reviews to Arbitrate – Reports that have been peer reviewed that require the Peer Review Administrator to determine the outcome of a discrepancy between peer review ratings.



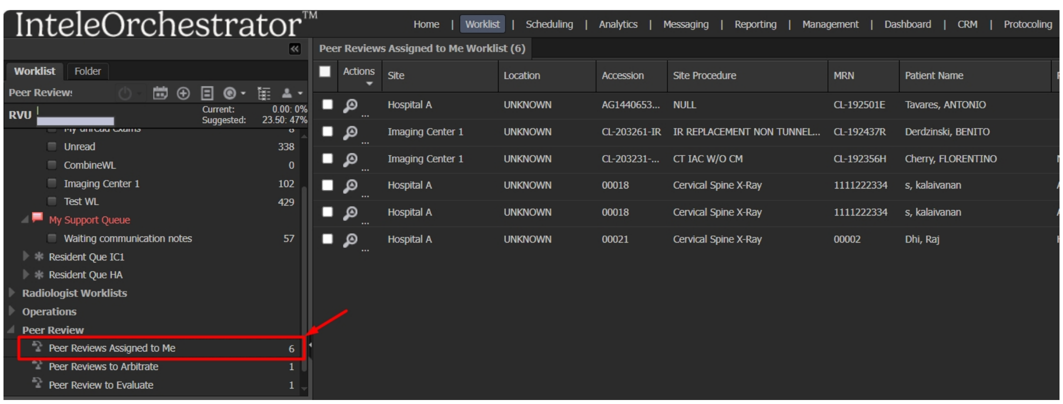
Opening Peer Reviews

To perform a peer review of an exam:

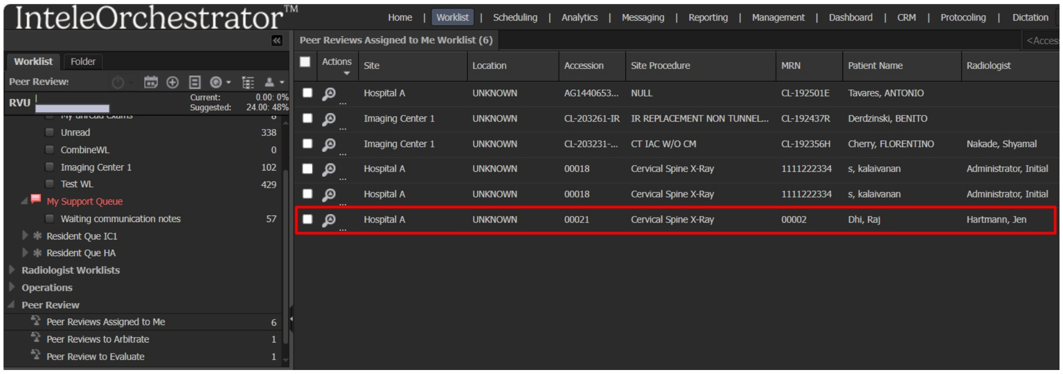
1. Open InteleOrchestrator.
2. If required, set your shift hours and click **Save**.
3. In the **Worklist** column select **Peer Review**. The Peer Review worklist will expand to show multiple choices.



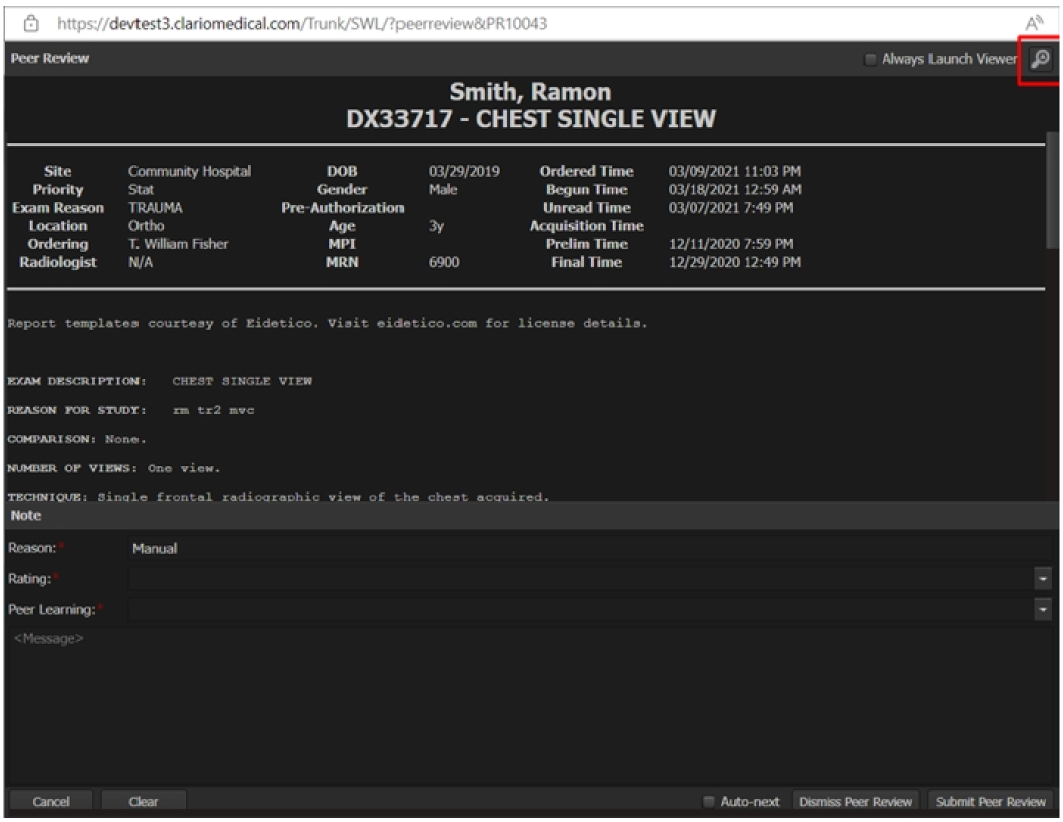
4. Click **Peer Reviews Assigned to Me** from the Worklist column. The Peer Review notes are displayed in the work area.



5. Click a Peer Review note in the work area.

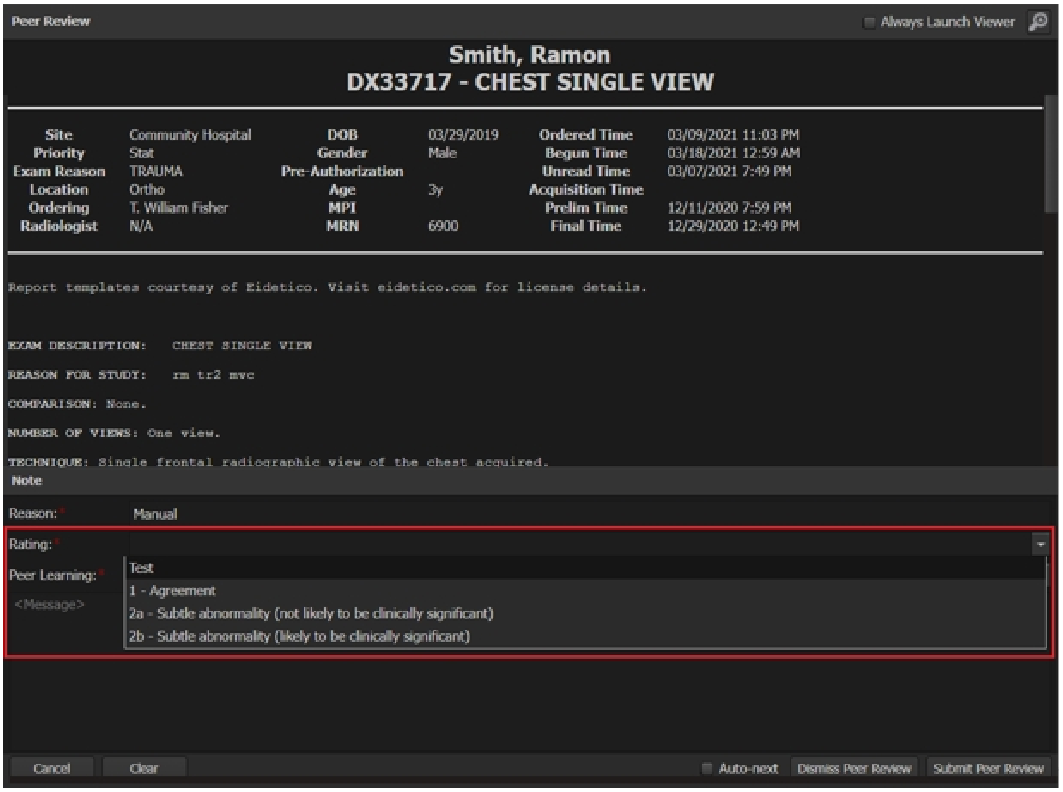


6. The Peer Review note is displayed. Here you can view the order, read the report and launch images in the viewer. Click located in the top right corner to open images in the viewer.

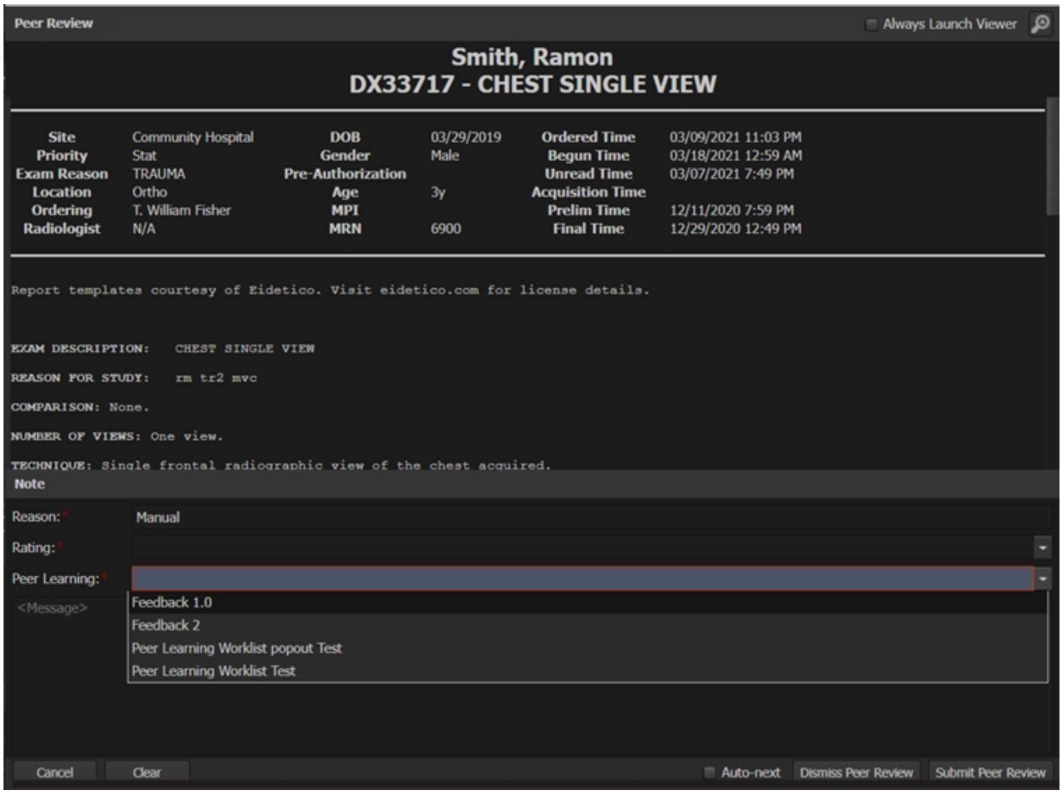


7. You can choose to either dismiss a peer review or perform a peer review. Click **Dismiss Peer Review** if you choose to dismiss the peer review. The peer review will be removed from the assigned worklist.

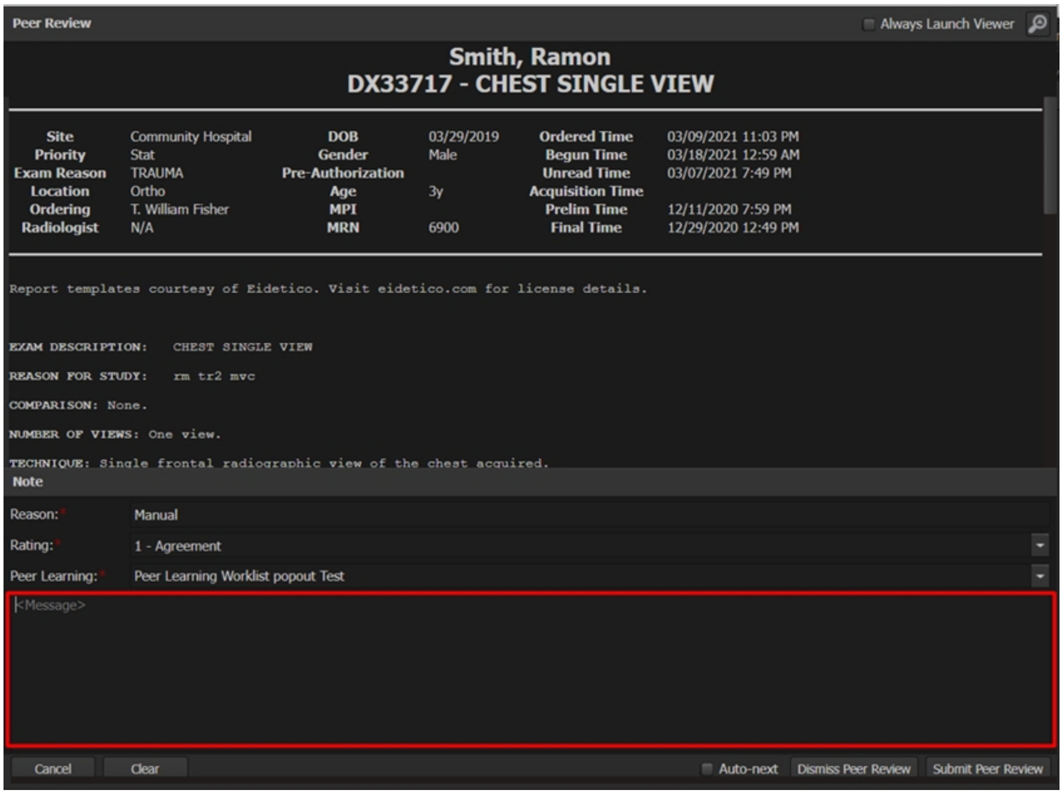
8. To perform a Peer Review, select a peer review **Rating** from the drop down menu.



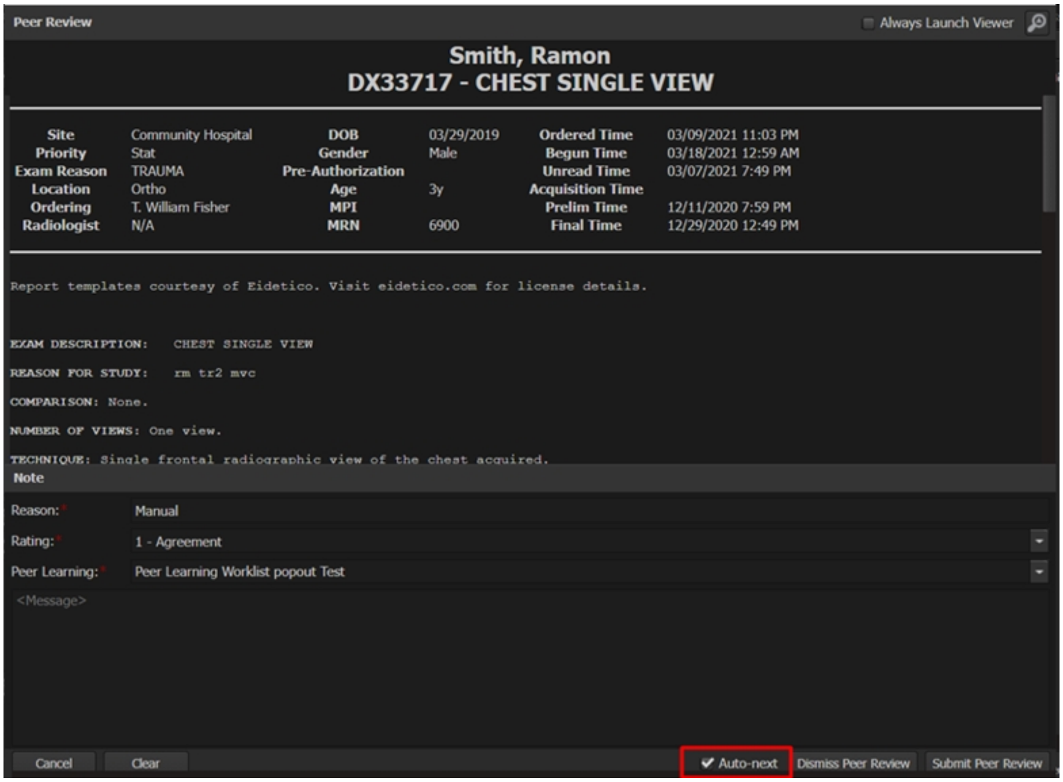
9. If required, select a **Peer Learning** option from the drop down menu.



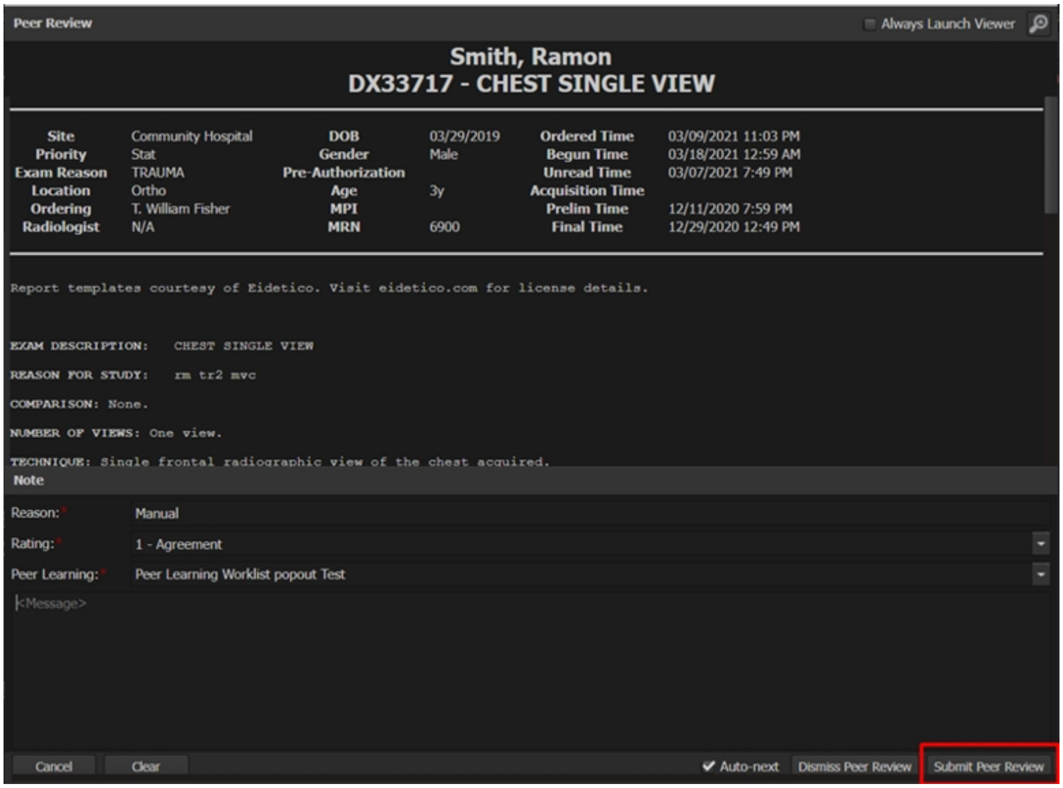
10. Enter a message (Optional).



11. You also have the option to first click **Auto-next** and then click **Submit Peer Review** to automatically go to the next exam to be peer reviewed.



12. Click **Submit Peer Review** to save your changes.

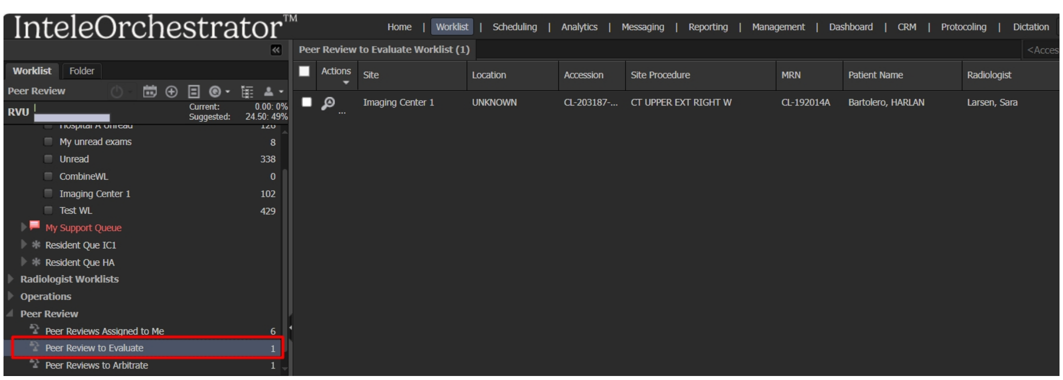


Peer Reviews to Evaluate Worklist

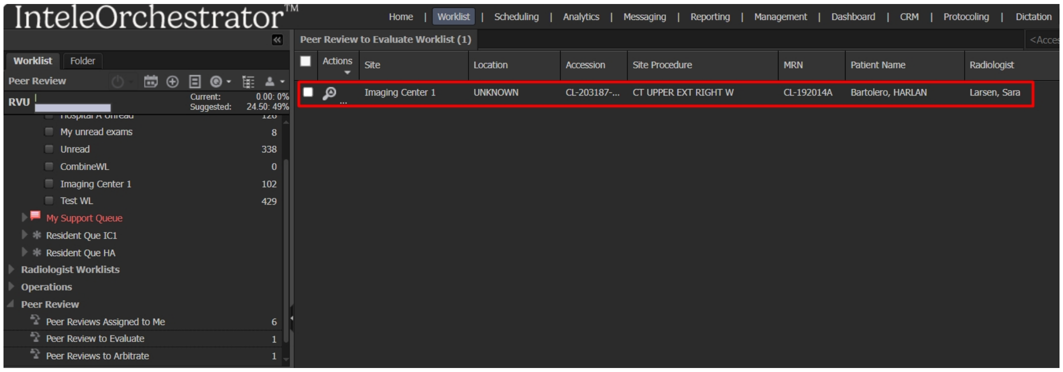
The Peer Reviews to Evaluate Worklist contains reports that have been peer reviewed by another colleague that the current user needs to review and potentially take action.

To evaluate reports that received positive feedback or an unfavorable peer review rating:

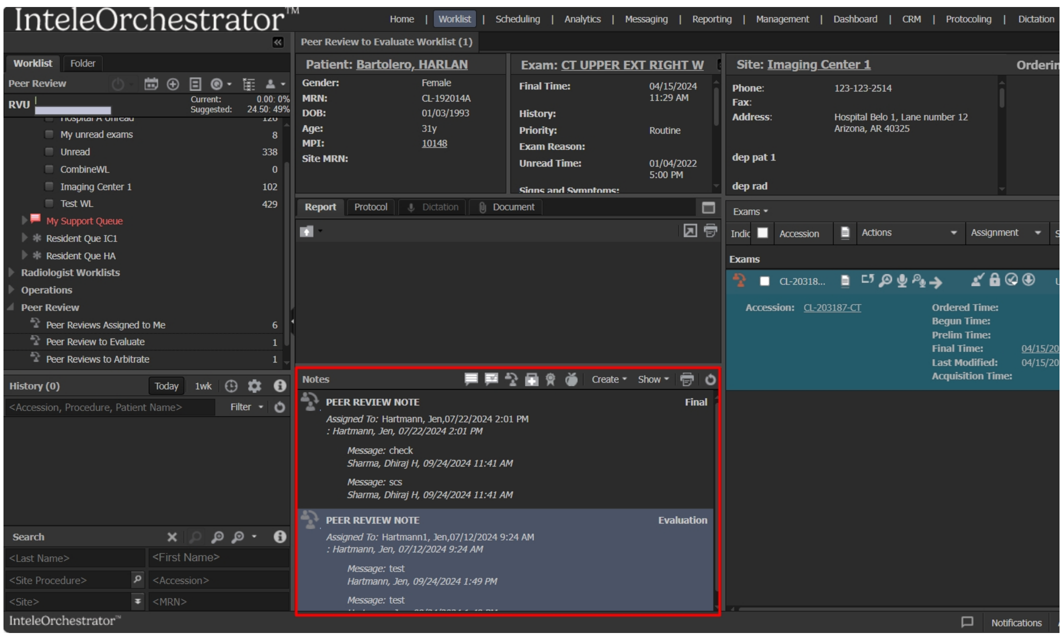
1. Click **Peer Reviews to Evaluate** from the worklist column. The details of the **Peer Reviews to Evaluate** are displayed in the work area.



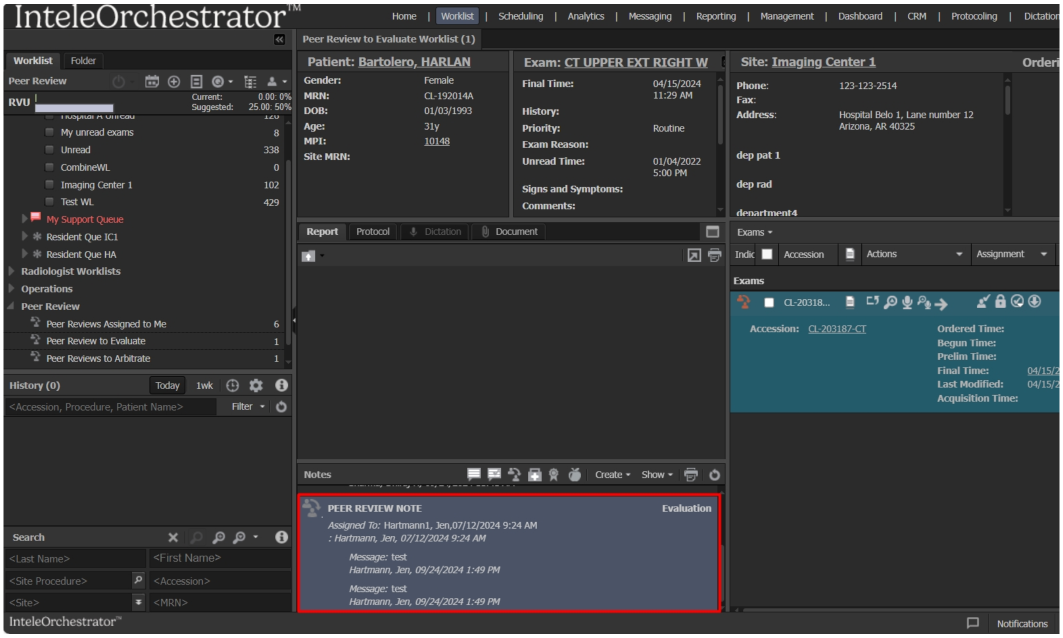
2. Click the Peer Review Note in the work area.



3. This will direct you to the Patient View where you can see the report and view the received Peer Review Notes.

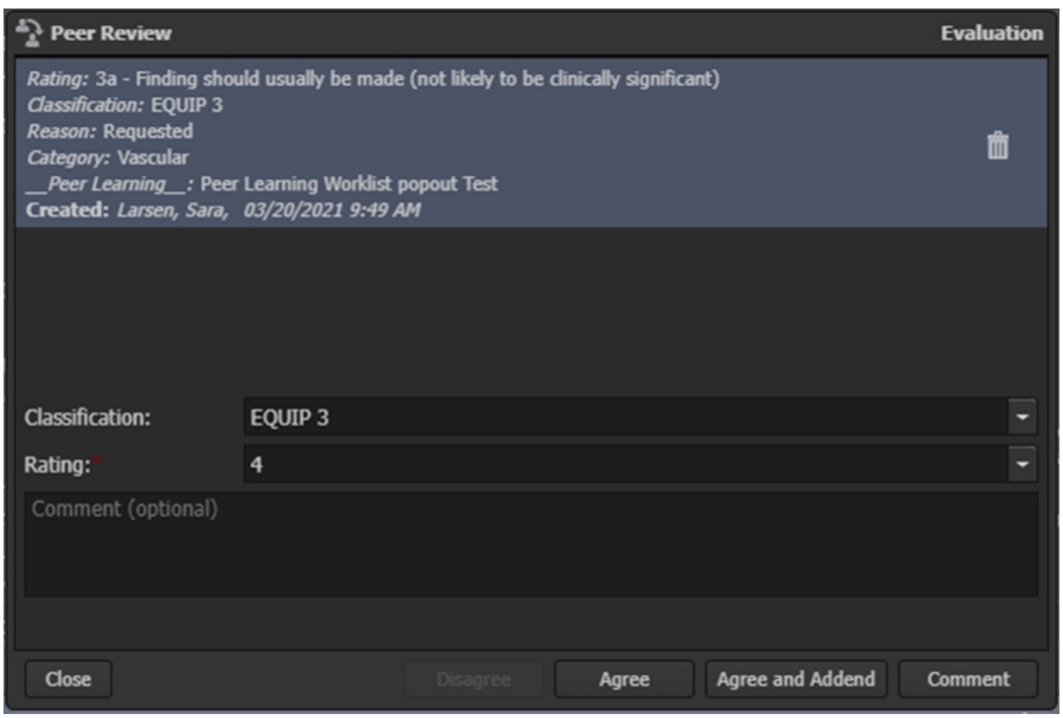


4. Click the Peer Review Note in the Evaluation status of the Notes panel.



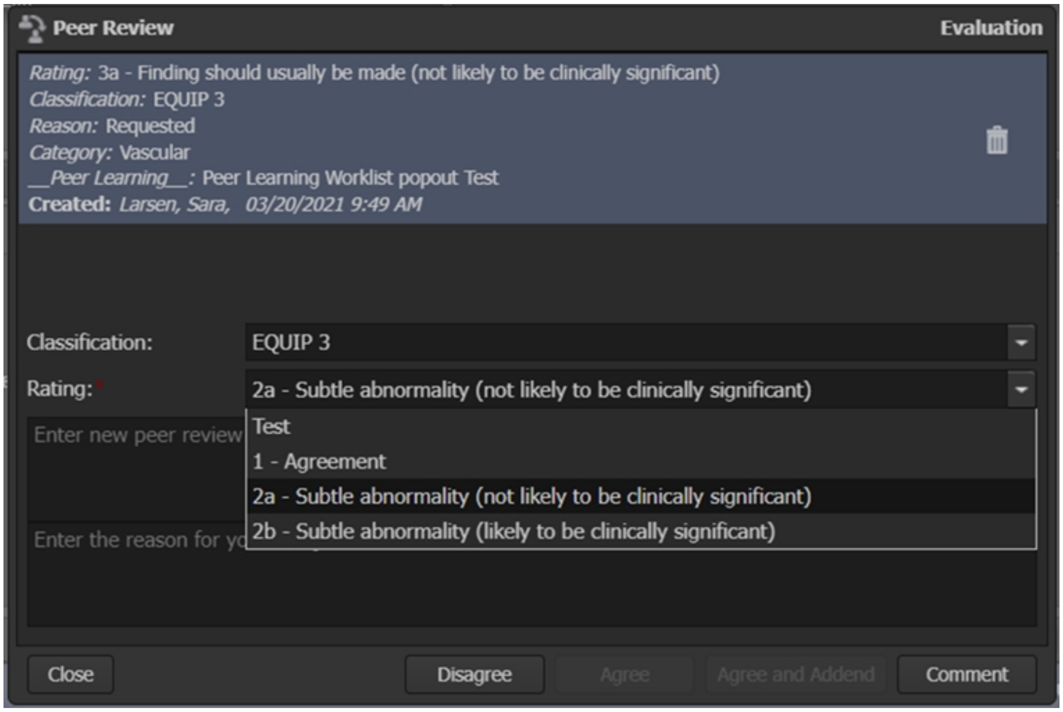
5. A new window opens, where you can agree or disagree with the Peer Review rating.

   To Agree: Click the **Agree** button. The Peer Review will move to final status.



To Disagree: Select a new score from the **Rating** drop-down menu. You have the option to enter a message or reason for your disagreement.

Click **Disagree**, if configured, the peer review will move to an arbitration status for the Peer Review Administrator to review and assign the final rating.

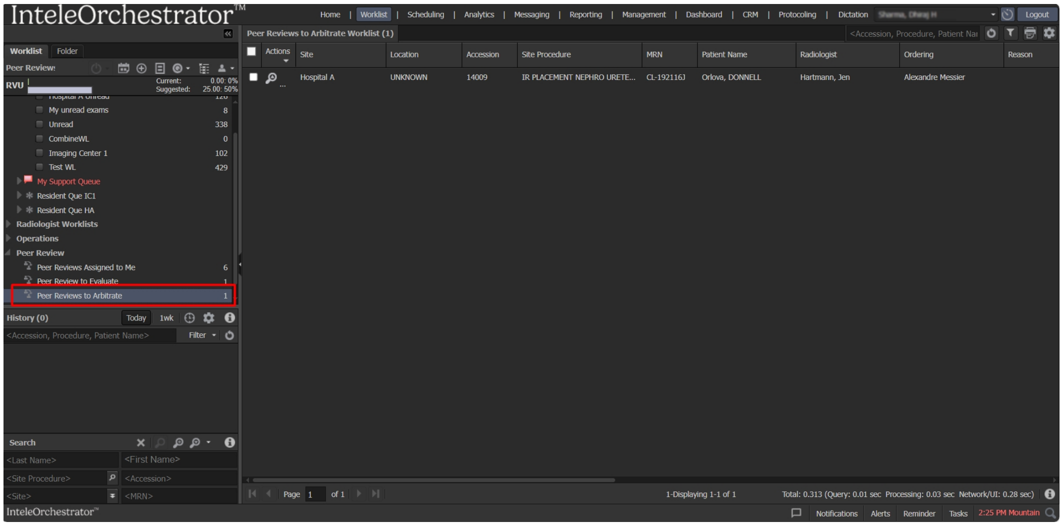


Peer Reviews to Arbitrate Worklist

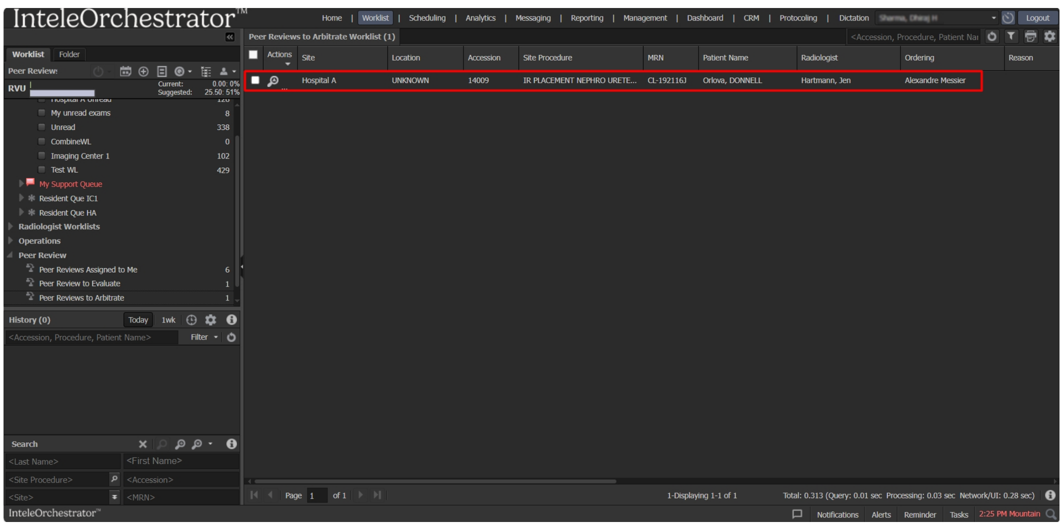
The Peer Reviews to Arbitrate Worklist contains peer reviewed reports that require the Peer Review Administrator to determine the outcome of a discrepancy between peer review ratings. Only the Peer Review Administrator will see this worklist.

To arbitrate exams that received a disagreement for peer review rating during the evaluation:

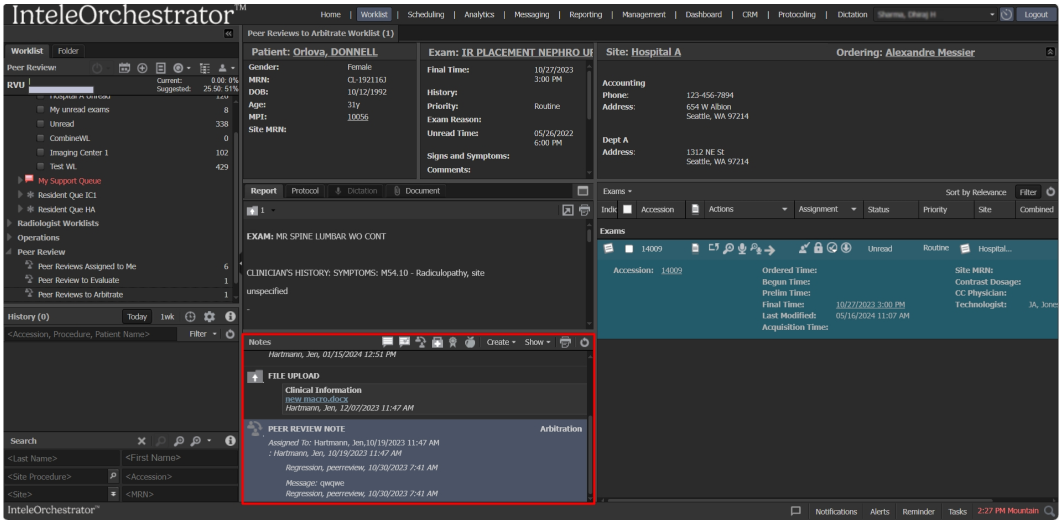
1. Click Peer Reviews to Arbitrate from the Peer Review worklist in the Worklist column. The list of Peer Review Notes are displayed in the work area.



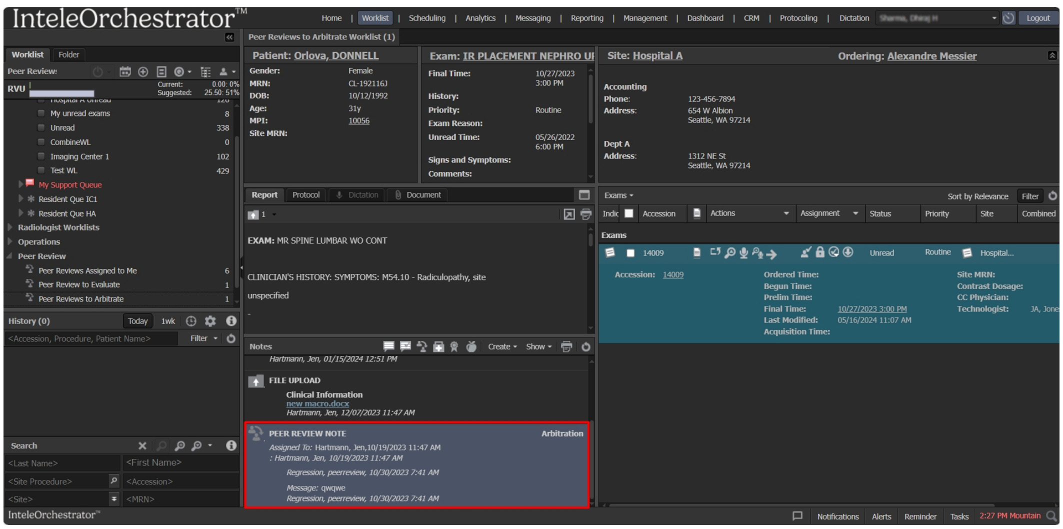
2. Click on a Peer Review Note displayed in the work area.



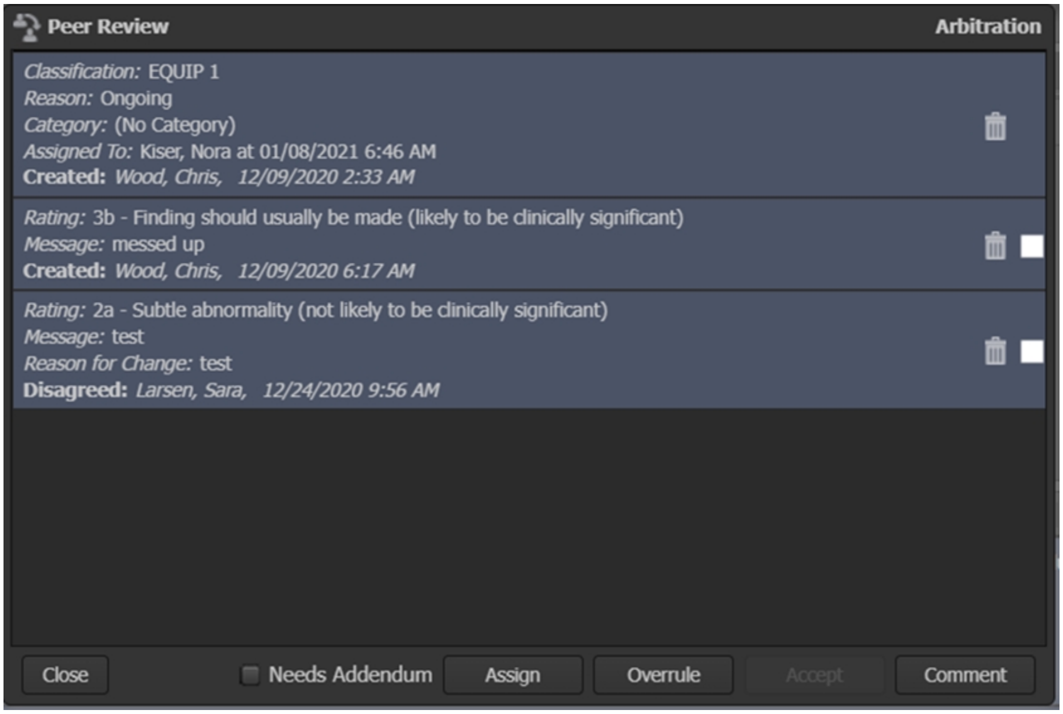
3. This will direct you to the Patient View where you can see the report. You can view the Peer Review Notes received from both the interpreting radiologist and the peer reviewer.



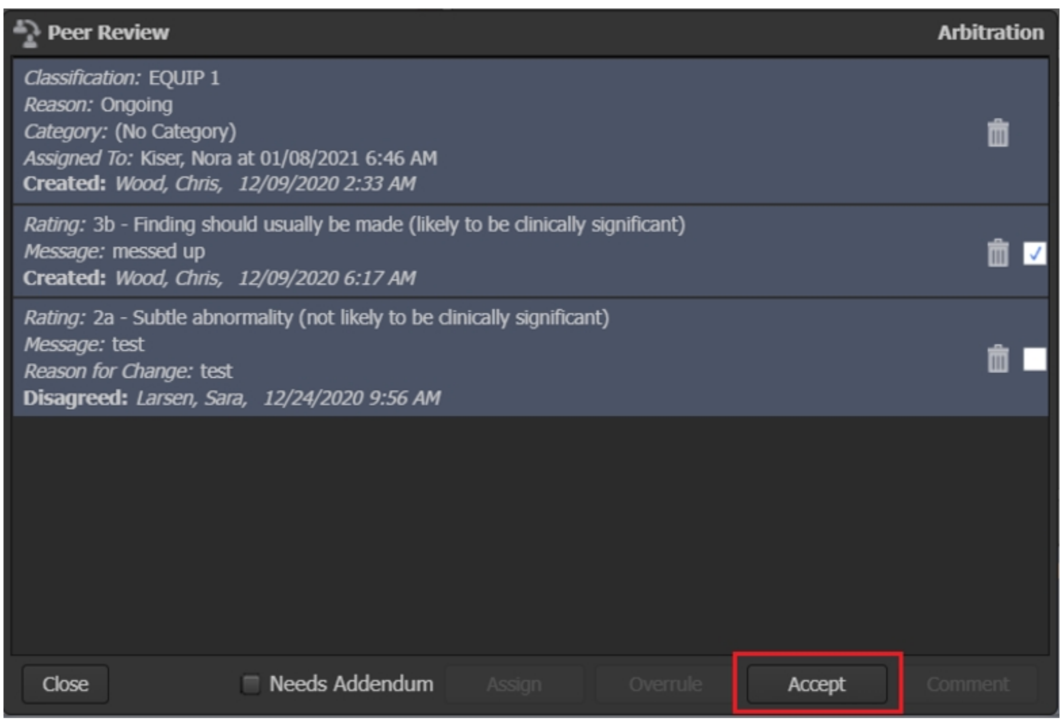
4. Click the note marked **Arbitration** to begin reviewing the Peer Review Note.



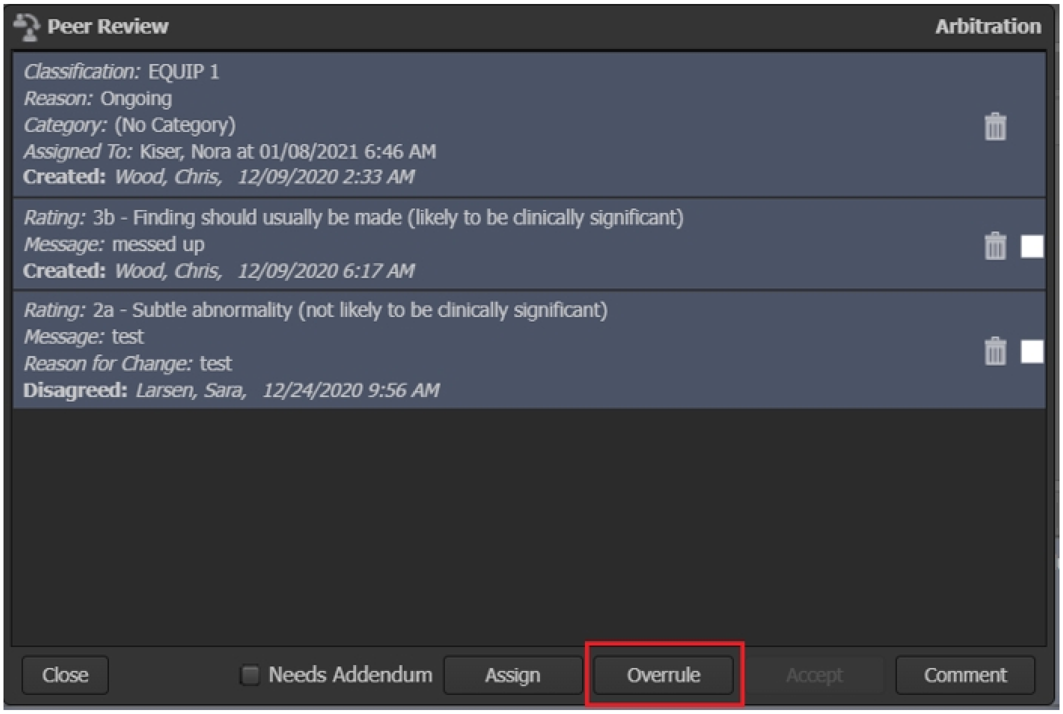
5. A new window opens where you can accept the peer review rating, overrule the peer review rating, or assign the arbitration to a different Peer Review Administrator.



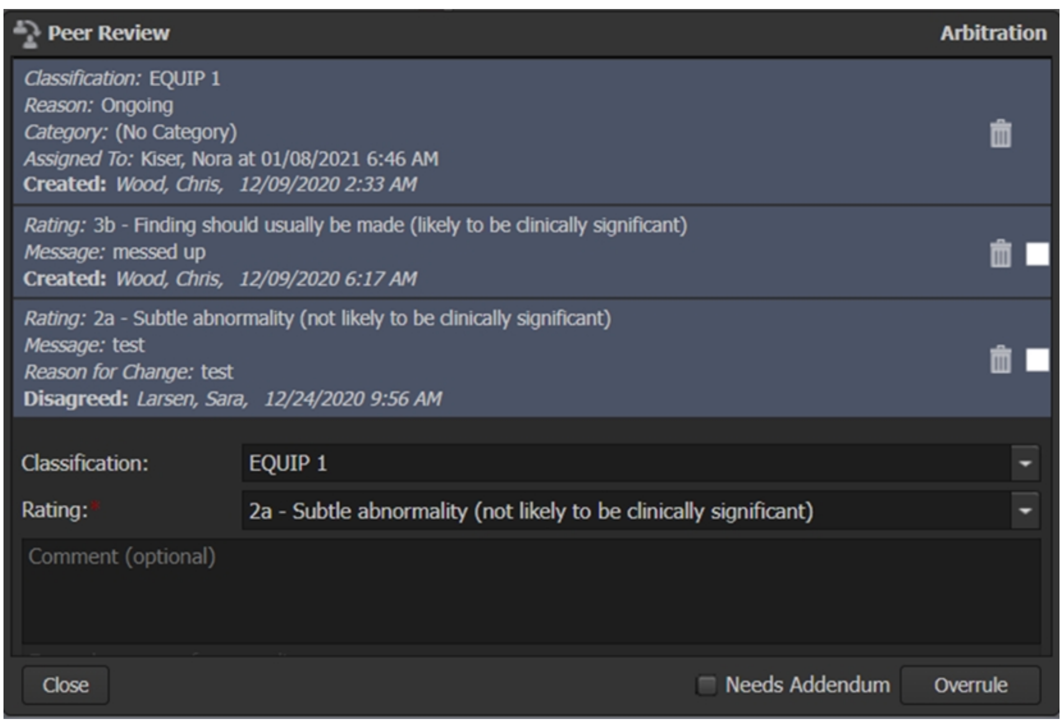
6. To **Accept**: Select the desired Peer Review rating by clicking the checkbox next to the rating you agree with and click **Accept**. The peer review will no longer display in the Worklist.



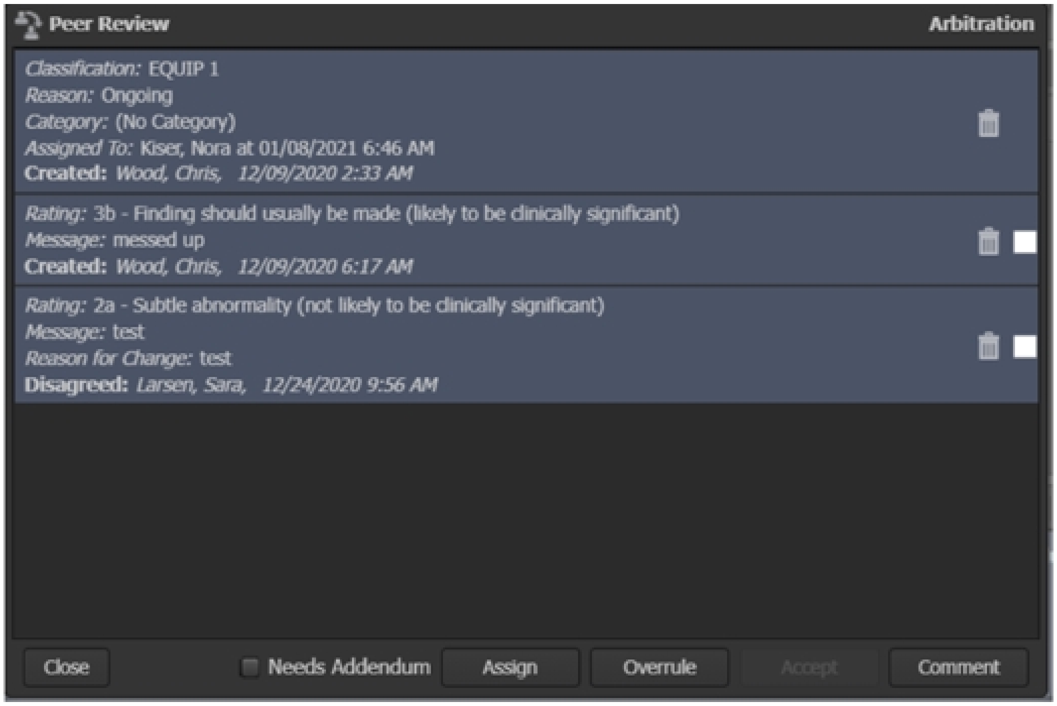
7. To **Overrule**: Click **Overrule**.



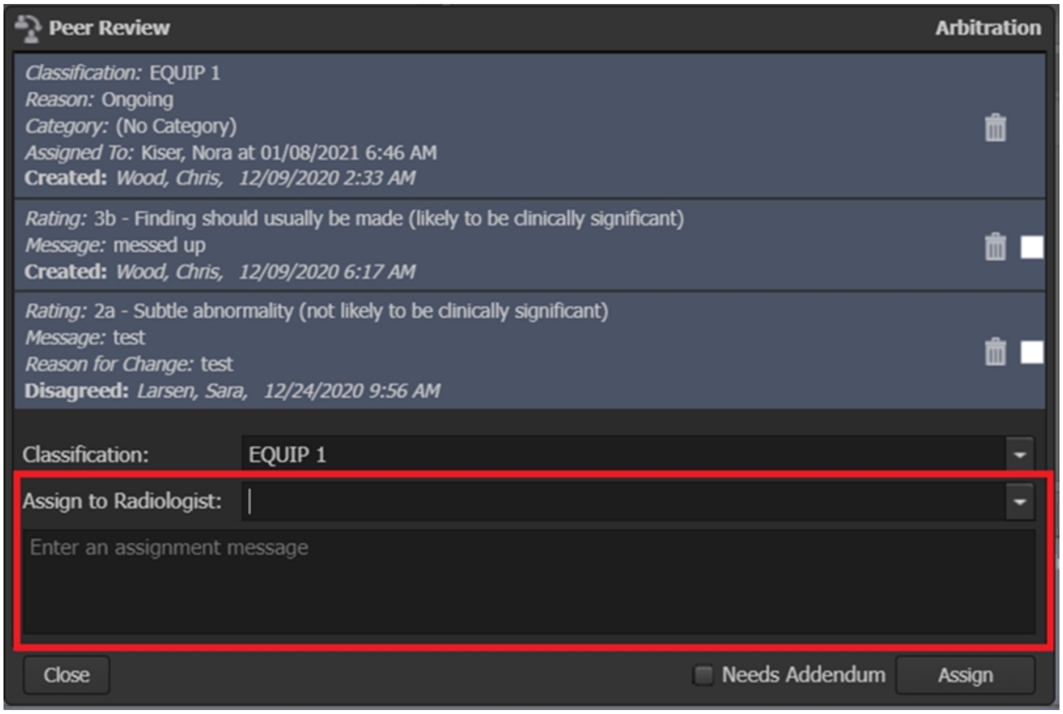
Enter a new rating, enter a comment and click **Overrule** to submit. The peer review will no longer display in the Worklist.



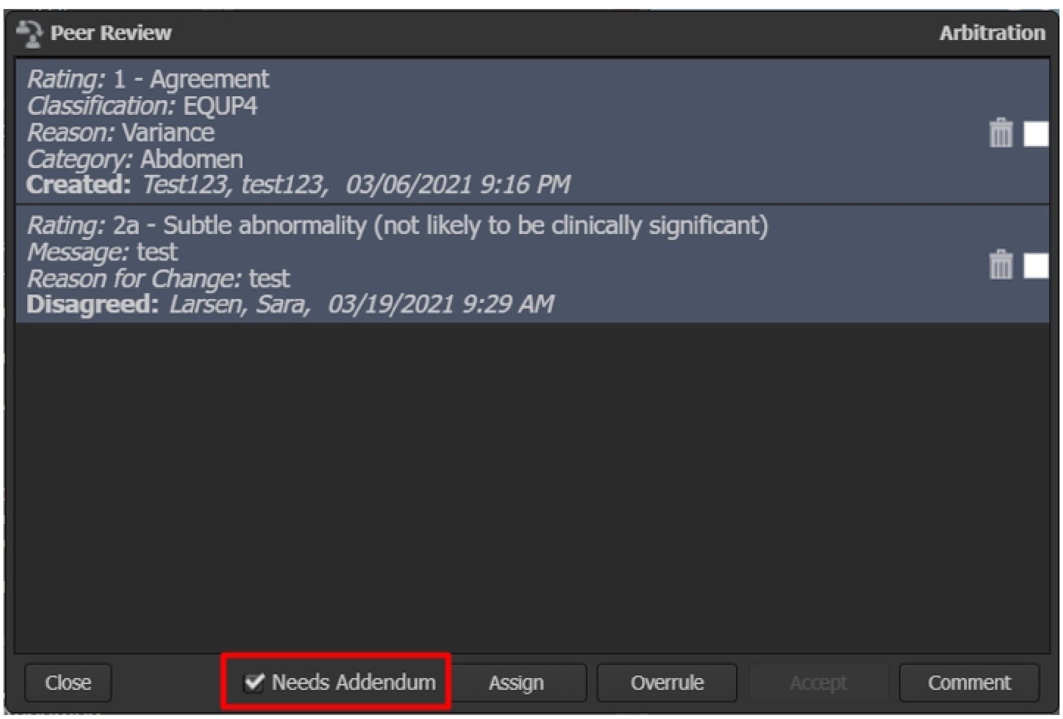
8. To **Assign**: Click **Assign**.



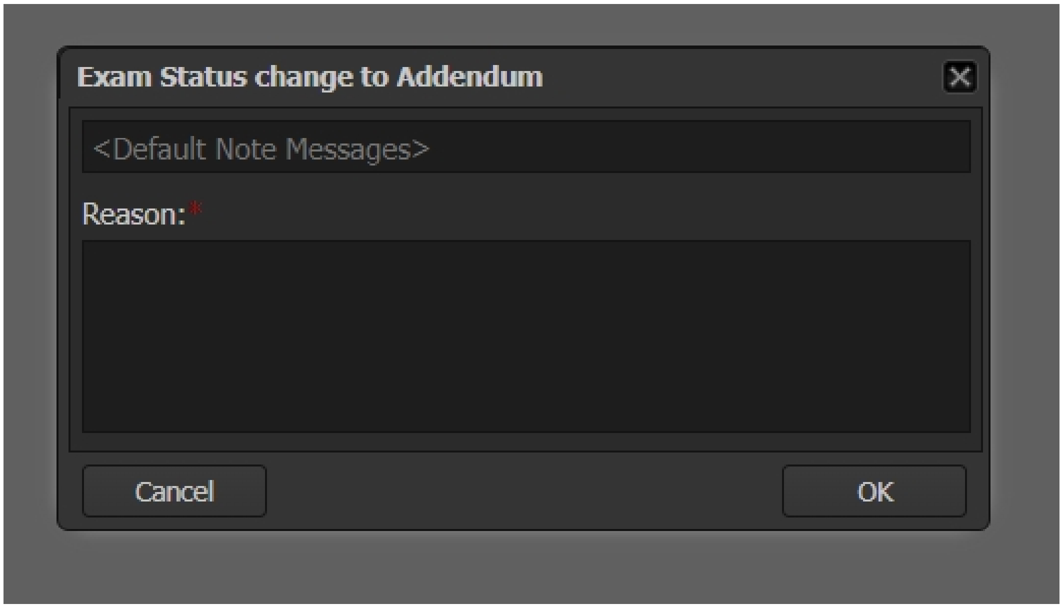
Select a Peer Review Administrator from the **Assign to Radiologist** drop-down menu. Enter a message and click **Assign** to submit. The peer review will remain in arbitration status and will be assigned to the new Peer Review Administrator.



9. When the Peer Review Administrator finalizes a peer review, they have an option to require/request an addendum.



10. A pop-up box will appear. Including in the Reason for the Addendum is required.



11. Click **OK**.

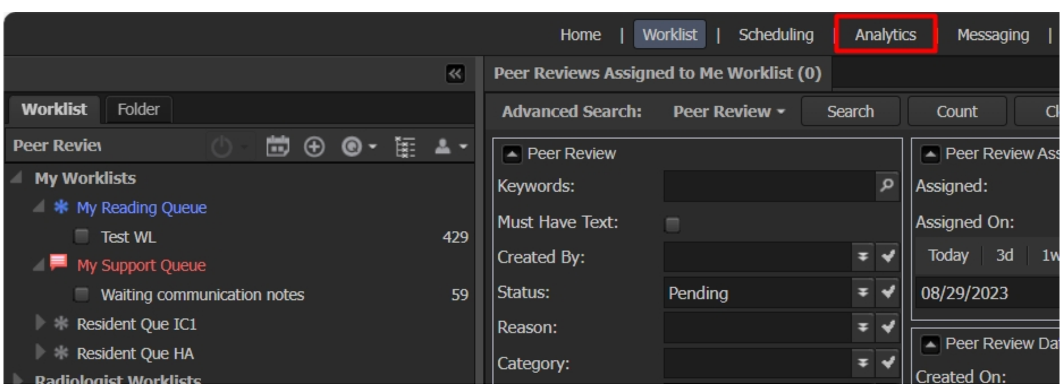
 Note: Peer review ratings are applied against the originating radiologist, even when an addendum is written.

Peer Review Scorecard

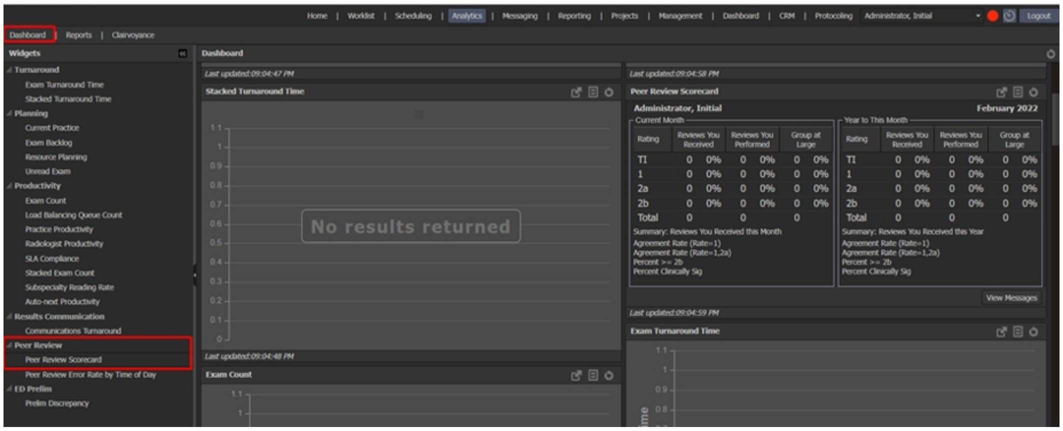
Radiologists can view their own results via the Peer Review Scorecard widget.

To view the Peer Review Scorecard:

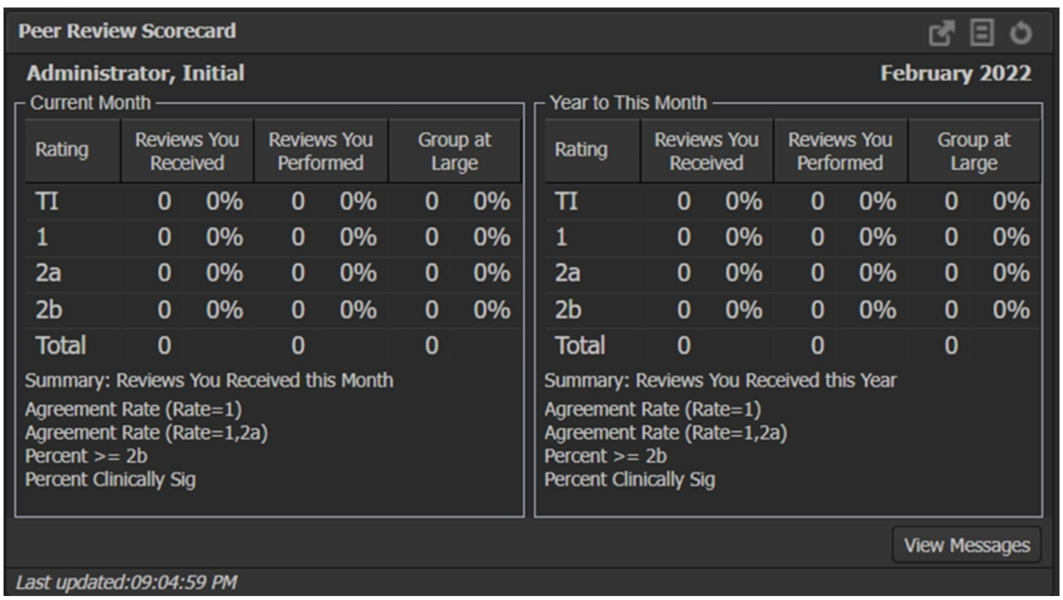
1. Select Analytics on the InteleOrchestrator home screen.



2. Click **Dashboard | Peer Review | Peer Review Scorecard**. The peer review scorecard is displayed in the work area.



3. The scorecard shows the reviews received during the current month or year to the current month.

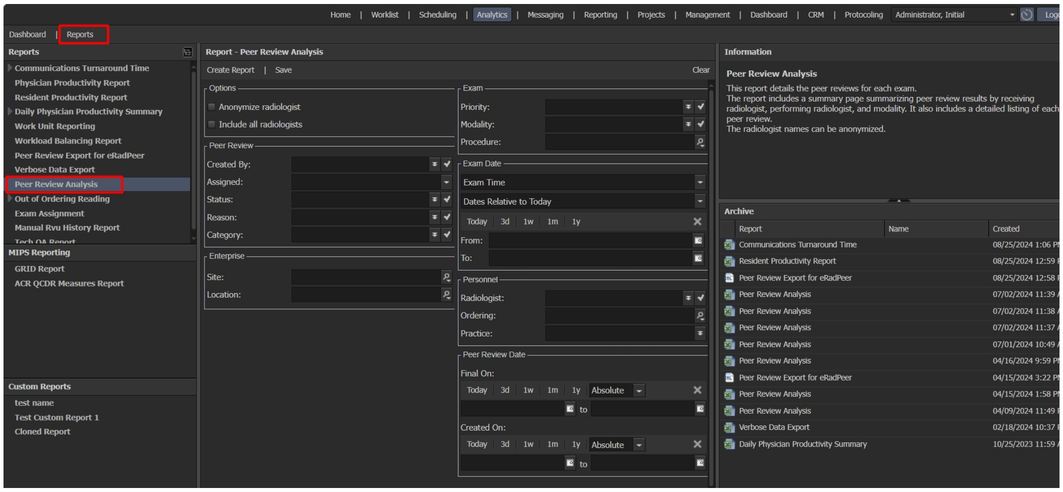


Peer Review Analysis Report

The Peer Review Analysis report includes a summary page summarizing peer review results by receiving radiologist, performing radiologist, and modality. It also includes details of each peer review. Note: If you cannot see the report contact your InteleOrchestrator administrator.

To view the Peer Review Analysis report:

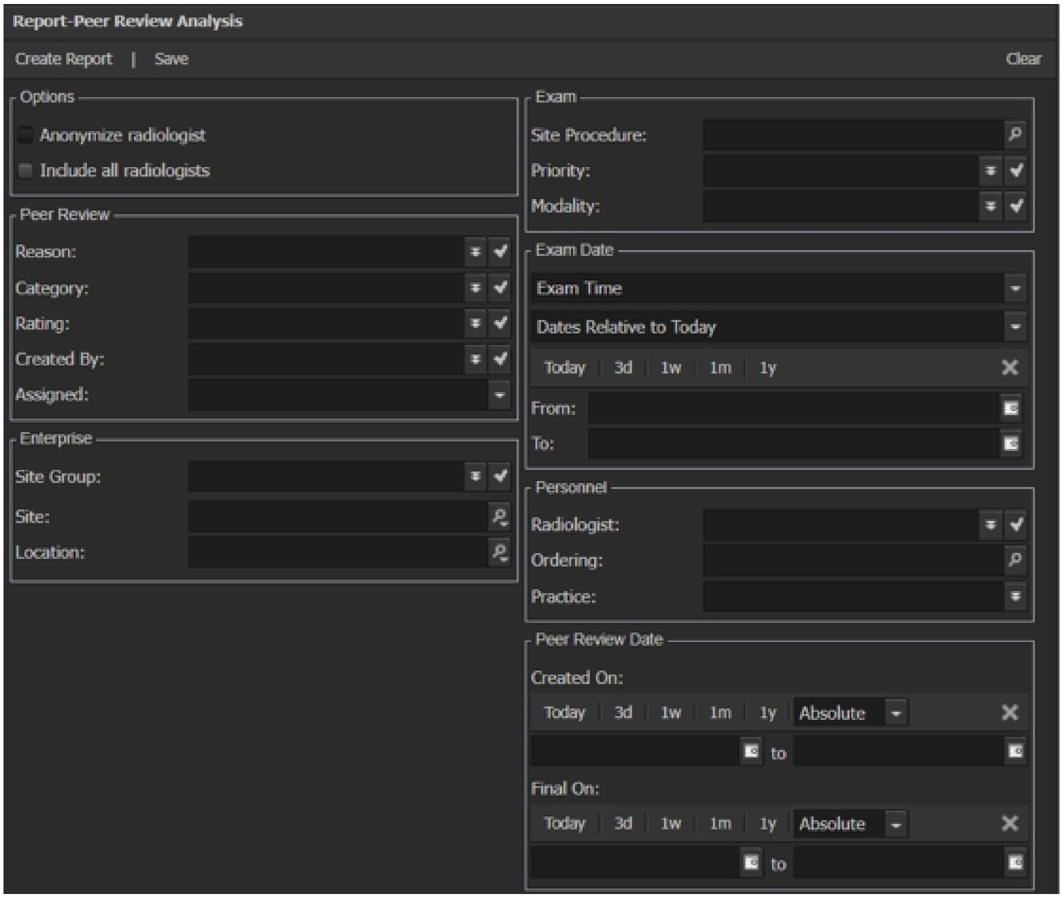
1. Click **Reports | Peer Review Analysis.** The Peer Review Analysis report is displayed in the Archive section.



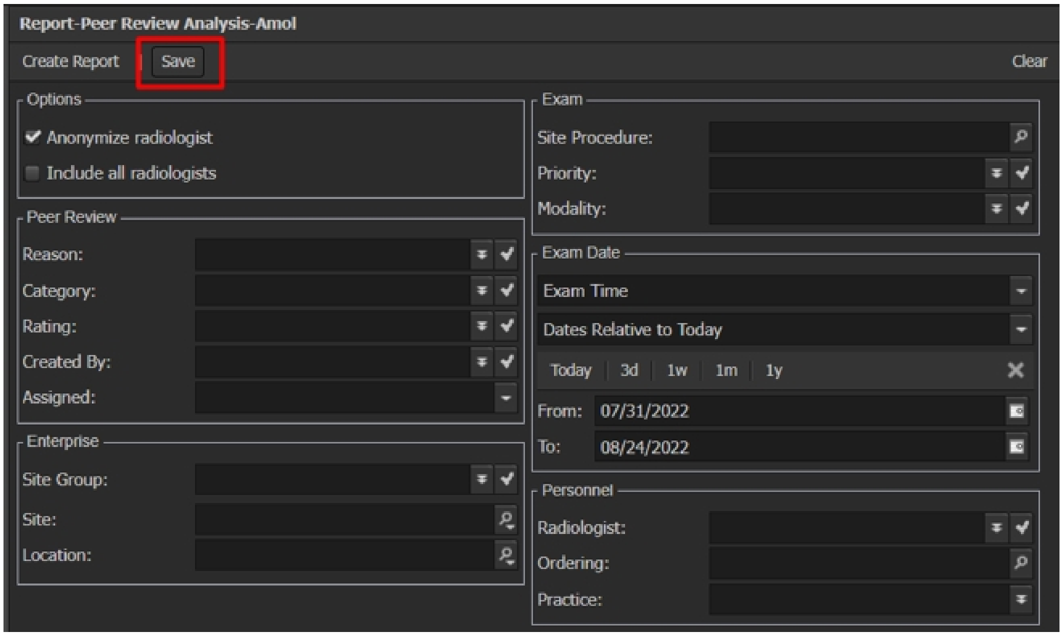
Creating Custom Reports

You can create custom reports by changing the filters as described below. See [Manage Report Data]() section for information about the filters.

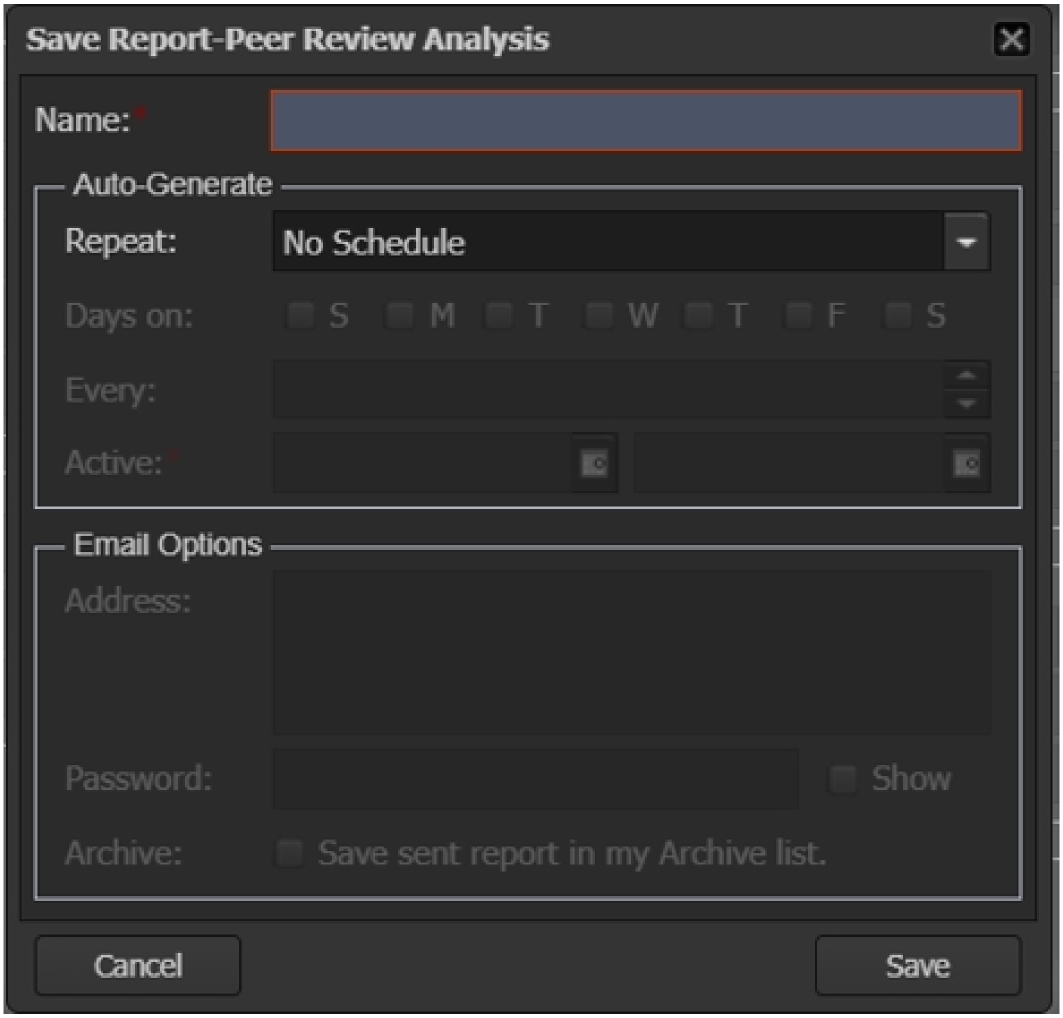
1. To create custom reports, set the filters as needed.



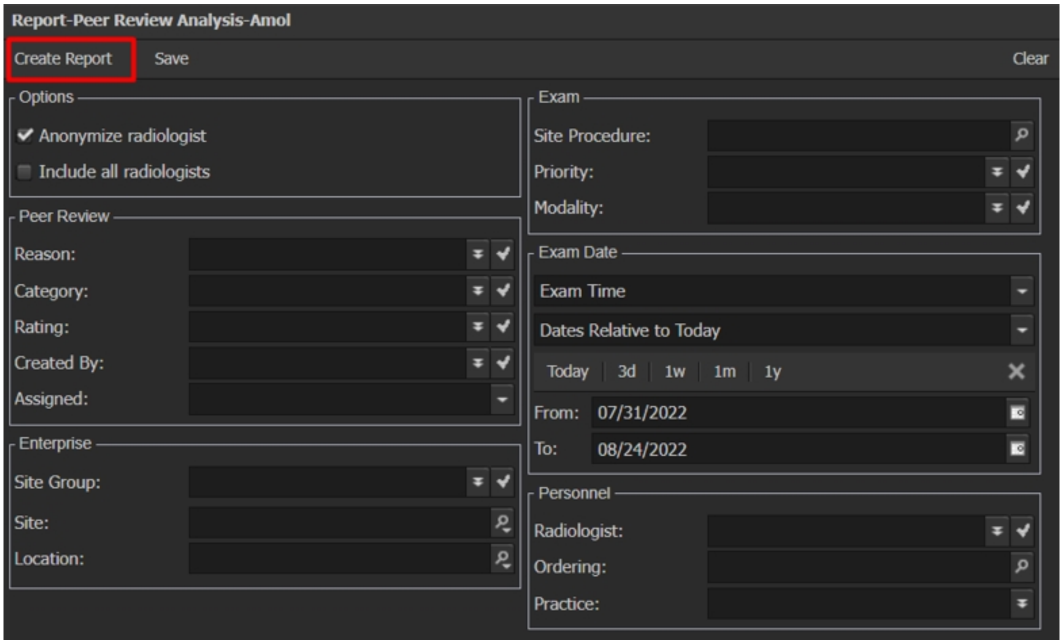
2. Click **Save** to apply the custom filter(s).



3. Enter a name for the custom filter and click **Save**.



4. Click **Create Report** to generate the Peer Review Analysis report.



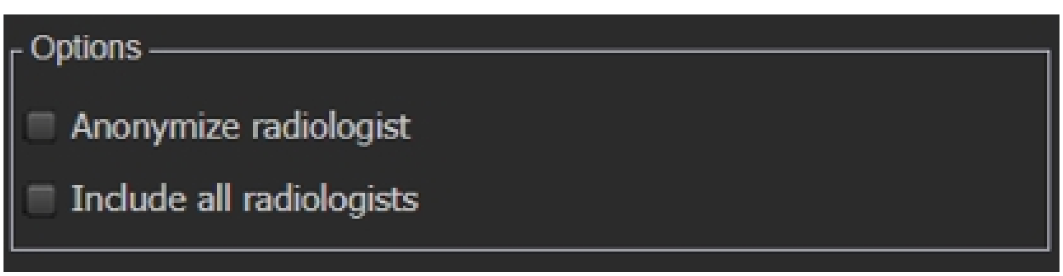
Manage Report Data

To customize Peer Review Analysis report data, you can:

- Anonymize Radiologist
- Select Peer Review type
- Select Enterprise
- Select type of exam
- Set the Exam date and time range
- Select user
- Set Peer Review Date

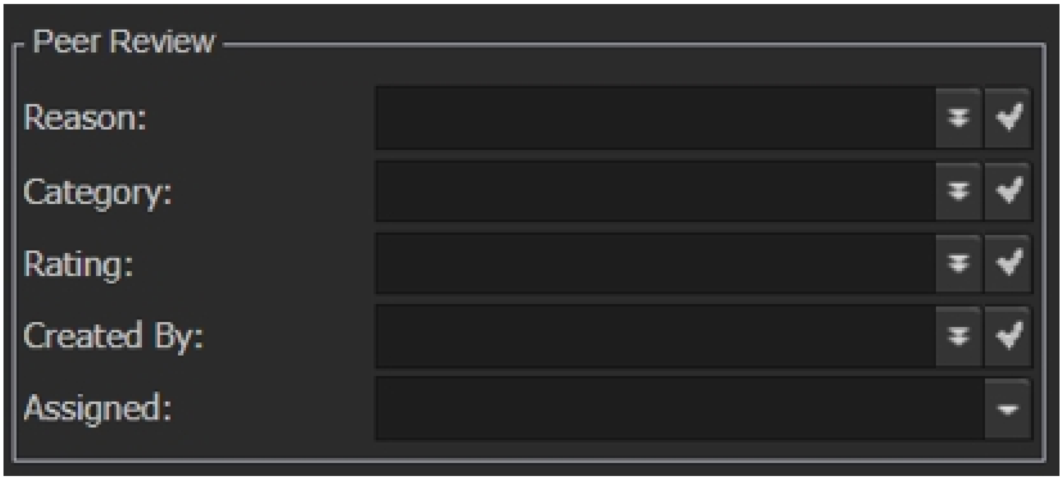
Anonymize Radiologist:

You can filter the report to anonymize radiologists or Include all radiologists (include identifying radiologist information).



Select Peer Review type:

You can filter the Peer Review Reports by selecting peer review details from the drop down menus.

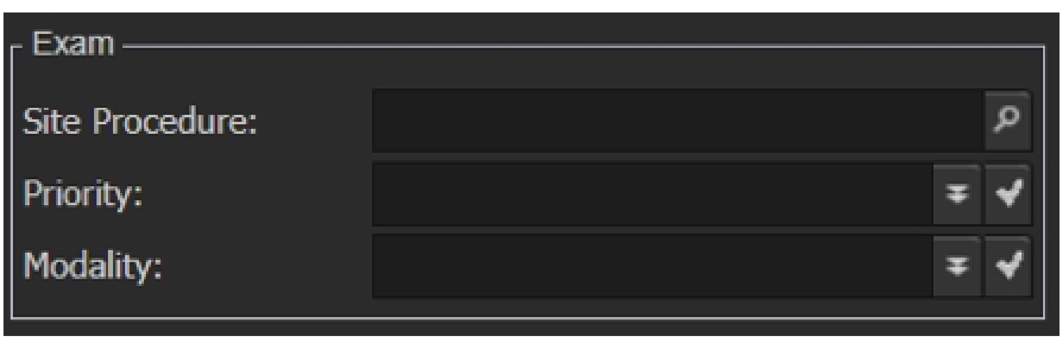


Select Enterprise:

You can filter the Peer Review Report by selecting the Site Group, Site, and Location.

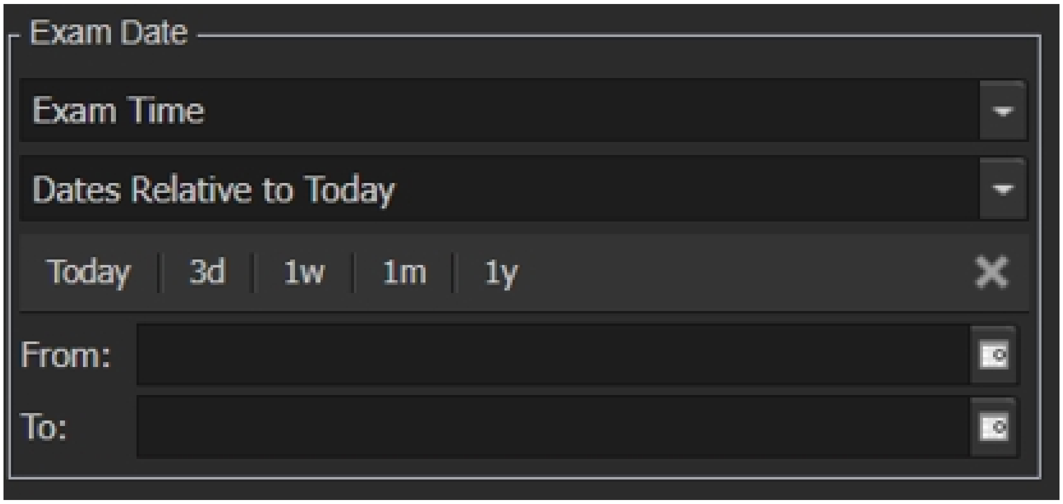
Select type of exam:

You can filter the Peer Review Report by selecting the type of exams from the drop down menu.



Set the Exam date and time range:

You can filter the Peer Review Report by setting the required date range for the report.

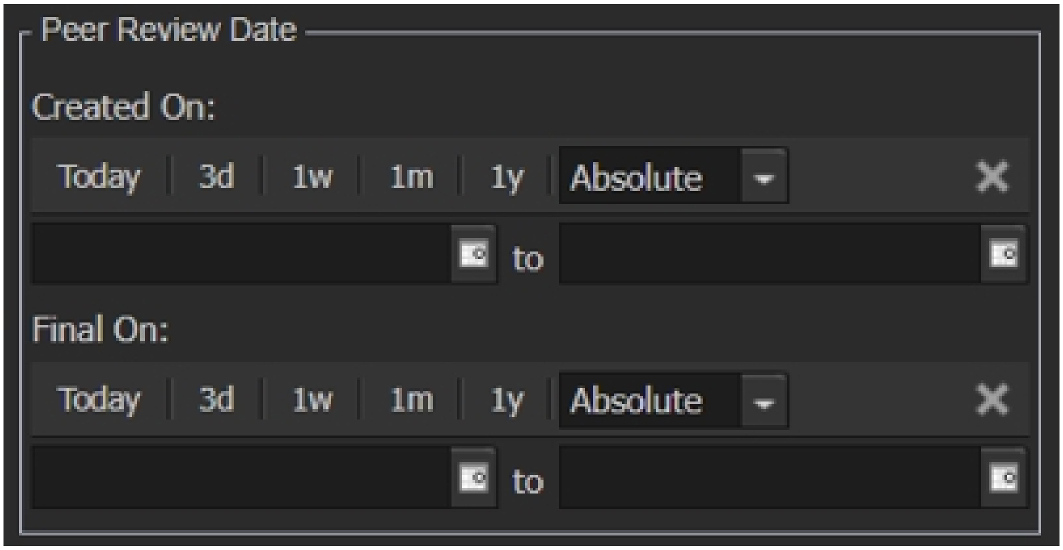


Select user:

You can filter the Peer Review Report by selecting the type of user or practice.

Set Peer Review Date:

You can filter the Peer Review Report by setting the peer review date range.


Peer Review Date
Created On:
Today
3d
1w
1m
1y
Absolute
to
Final On:
Today
3d
1w
1m
1y
Absolute
to

10

INTELEORCHESTRATOR ANALYTICS

InteleOrchestrator Analytics provides enterprise-wide operational data and real-time practice information. InteleOrchestrator creates clear visualizations using data from your worklist.

In this chapter:

Analytics Overview

InteleOrchestrator Analytics provides enterprise-wide operational data and real-time practice information. InteleOrchestrator creates clear visualizations using data from your worklist. If desired, you can generate reports to share with the rest of your organization.

Analyze Your Practice Data

Instead of relying solely on radiologist’s perceptions of where productivity is being lost, InteleOrchestrator software analyzes the practice data. While radiologists can guide the analysis, data always surpasses individual opinions.

Some of the data included in the analysis are:

- Shift and radiologist productivity
- Interruptions
- Interfaces with Operations Staff and Radiology Assistants
- Exam assignment patterns
- Modality, site, subspecialty patterns
- Turnaround Time (TAT) and Service Level Agreement (SLA) compliance patterns
- Inflow of exams and rejection patterns for incomplete exams
- Peer review data as a function of time of day radiologist, and exam type

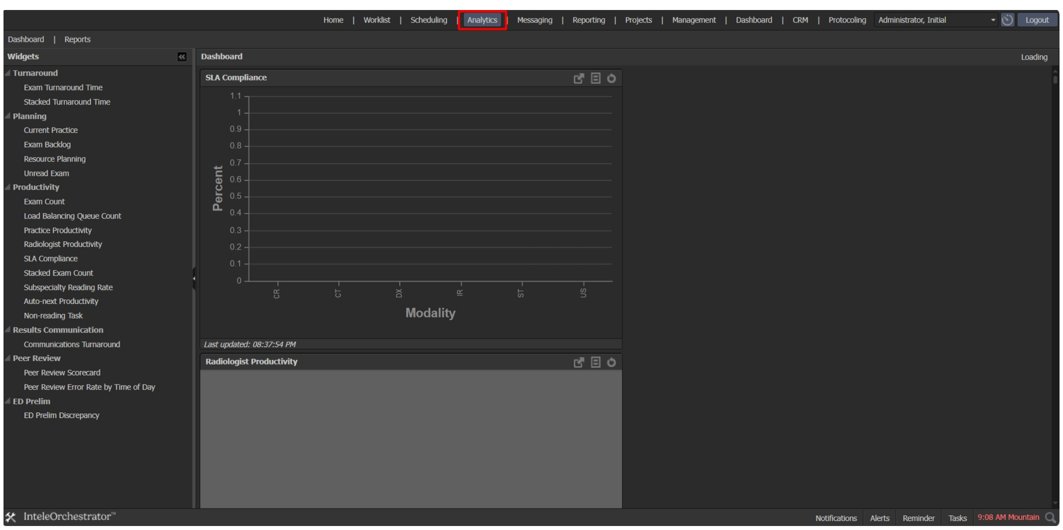
Opening Analytics

There are two ways to open the Analytics page.

Opening the Analytics page from the Home page:

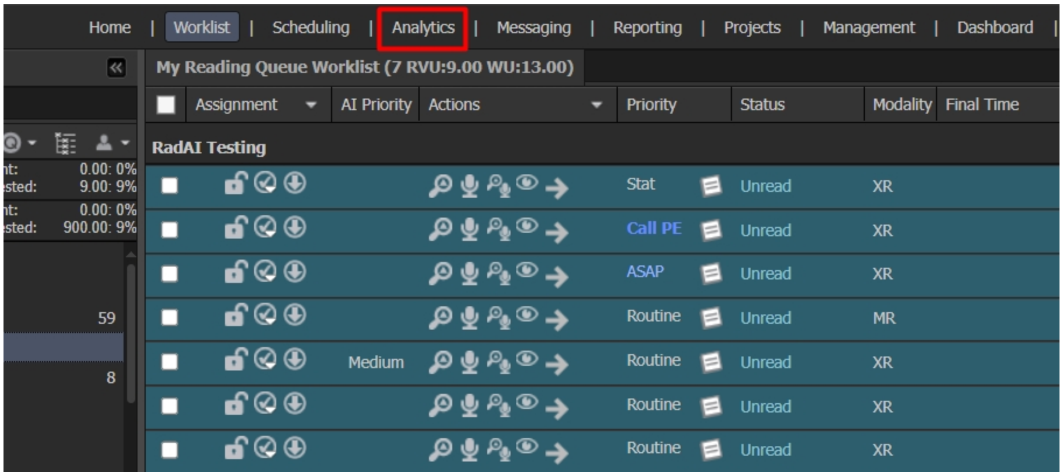
1. From the Home page, click **Analytics**.

2. The Analytics page is displayed.



Opening the Analytics page from another InteleOrchestrator module:

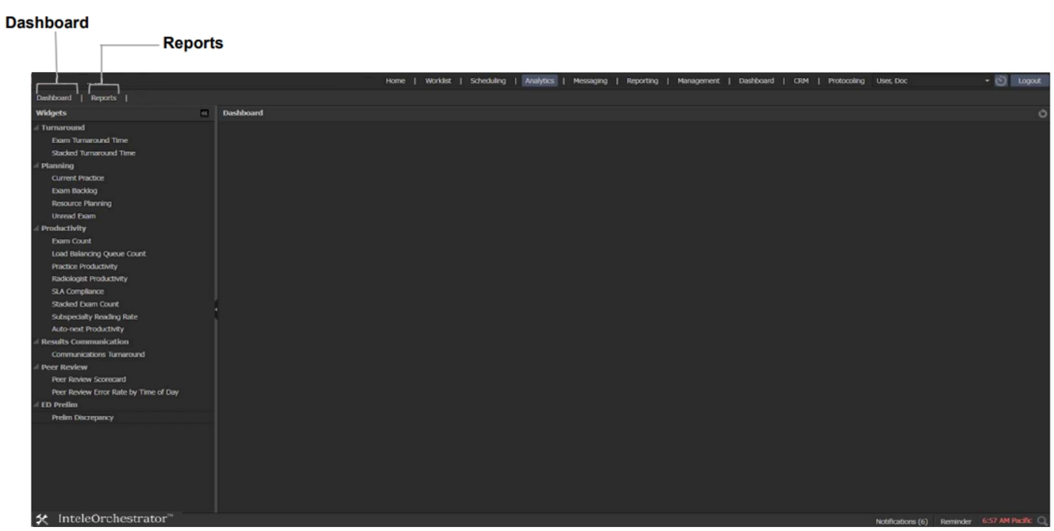
1. From the list of applications click **Analytics**.



2. The Analytics page is displayed.

If you don't have access to the Analytics Module, please reach out to your InteleOrchestrator administrator for assistance.

Understanding the Analytics Page



The Analytics page provides the following tools to view data in InteleOrchestrator:

- Dashboard Widgets - provides a real-time view of exam data.
- Reports - built-in analytic reports with the capability of creating or customizing reports.

Dashboard Widgets

A widget provides a real-time view of data. Accessing these widgets can assist your administration team in understanding the current operation of your practice, aiding in resource planning. Each widget can be filtered by many variables, including shift. In all cases, the data used to generate the graph can be exported to an Excel-readable format.

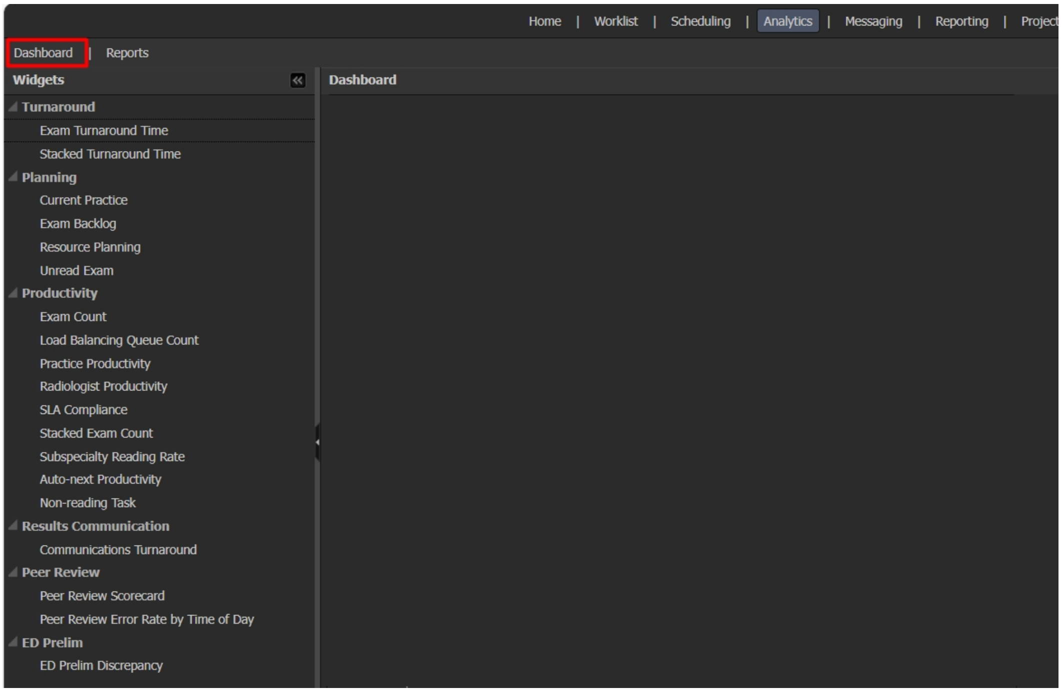
Each widget operates on a permission-based system, with permissions configured in the Management module under User Role Management. Contact your system administrator for more information.

Viewing Widgets

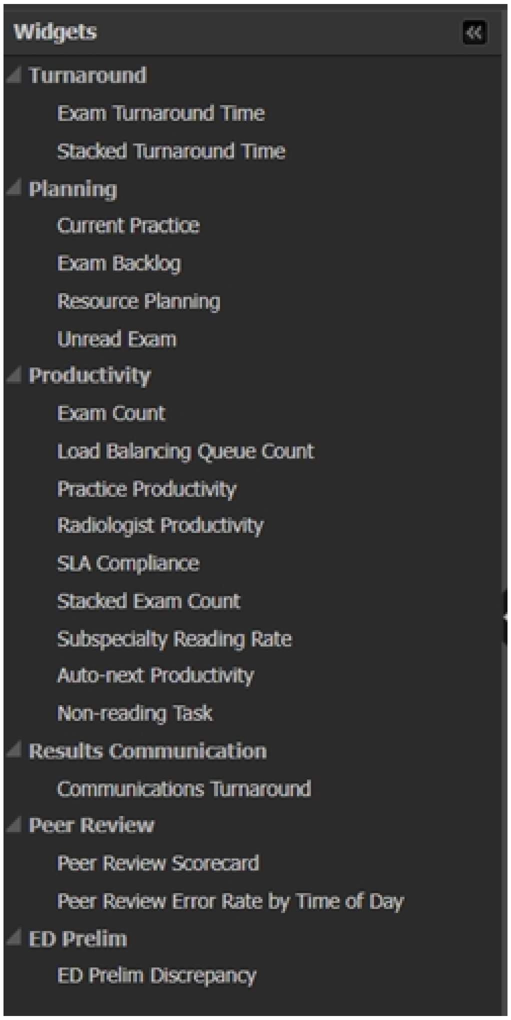
To view available widgets:

1. From the Home page, click **Analytics**.

2. Click **Dashboard**.



3. The list of widgets is displayed.



Each widget is described below:

Widgets	Description
Exam Turnaround Time	Measure exam turnaround time by Modality, Radiologist, Priority, Site and Shift. The turnaround time bubble chart displays three dimensions of data: • Y-axis: Turnaround time = Final Timestamp - Unread Timestamp (Default) Note: Users can define Exam Turnaround time in the widget. • X-axis: Modality, Radiologist, Site, Shift, Priority • Bubble size: Exam count Statuses available: Acquired, Begin, Completed, Escalated, Exam Time, Final, Modified, OnPACS, Ordered, Prelim, Signed or

Widgets	Description
	Unread.
Stacked Turnaround Time	Measure average exam turnaround time for multiple segments of the exam life cycle. The stacked turnaround time widget plots average turnaround time by shift, modality, radiologist, site or priority. You can select multiple turnaround time segments. For example. Exam Time to Unread Time and Unread Time to Final Time.
Current Practice	Shows the current number of exams, open communications, and open tasks for a defined set of sites or site groups: ● For exam count, you must specify exam status. Optionally, you can filter by Modality, Site, Site group or Priority. ● For open communication count, you can select type. If no selection is made all types will be included in the count. ● For open tasks count, you can select type. If no selection is made all types will be included in the count.
Exam Backlog	Plot the number of exams in the Unread status at each interval throughout a day or averaged across multiple days. This graph performs a simple count of exams. The export will not include specific exams and the graph cannot be filtered.
Resource Planning	Assess exam count trends throughout the day, week, or year by averaging longer term data. The resource planning histogram displays the distribution of exam count by hour of day, grouped by Radiologist, Modality, Site, Shift, or Subspecialty. This widget is useful when determining staffing needs.
Unread Exam	Plot exam count by Radiologist, Modality, Site, Shift, or Subspecialty with a stacked third dimension showing time spent in a selected status. The unread exam count chart displays two dimensions of data: ● Y-axis: Exam Count = number of exams in unread status. ● X-axis: Modality, Radiologist, Site, Shift or Subspecialty.
Exam Count	Plot exam count by Modality, Radiologist, Site Shift or Subspecialty. The exam count chart displays two dimensions of data:

Widgets	Description
	● Y-axis: Exam Count = number of exams in Final status. ● X-axis: Modality, Radiologist, Site, Shift or Subspecialty.
Load Balancing Queue Count	Track radiologist's current exam assignment queue for each load balanced assignment rule. The queue count table displays each load balanced assignment rule followed by the radiologists who currently have exams assigned to them by that rule. For each rule, the count of currently unassigned exams is displayed. For each radiologist, the count of exams assigned by that rule and the total count of all assigned exams is displayed.
Practice Productivity	Plot professional RVUs or Work units and exam count by day and month. The Practice Productivity mixed series chart displays three dimensions of data: ● Left Y-axis: Exam count = number of exams in a Final status. ● Right Y-axis: Professional RVUs or Work units = sum of professional relative units for the exams in a Final status. ● X-axis: Time = Day of Week or Month of Year.
Radiologist Productivity	Track radiologist's productivity including exam count, professional RVU or WU and turnaround time. The multi-panel productivity chart displays radiologist productivity as measured by exam count, professional RVUs or Work units count and turnaround time. ● Exam count = number of exams in a Final status ● Total RVUs or Work units = sum of professional relative value units for the exams in a Final status. ● Avg TAT = (Final Timestamp - Unread Timestamp) / (Exam Count)
SLA Compliance	Shows the percent of exams that were read within the defined service level agreement (configured in SLA Management). SLA Compliance can be plotted as a function of modality, radiologist, shift, site, or priority.
Stacked Exam Count	Plot exam count by day or month with a stacked third dimension by Modality, Radiologist, Site, Shift or Subspecialty. The stacked exam count chart displays three dimensions of data:

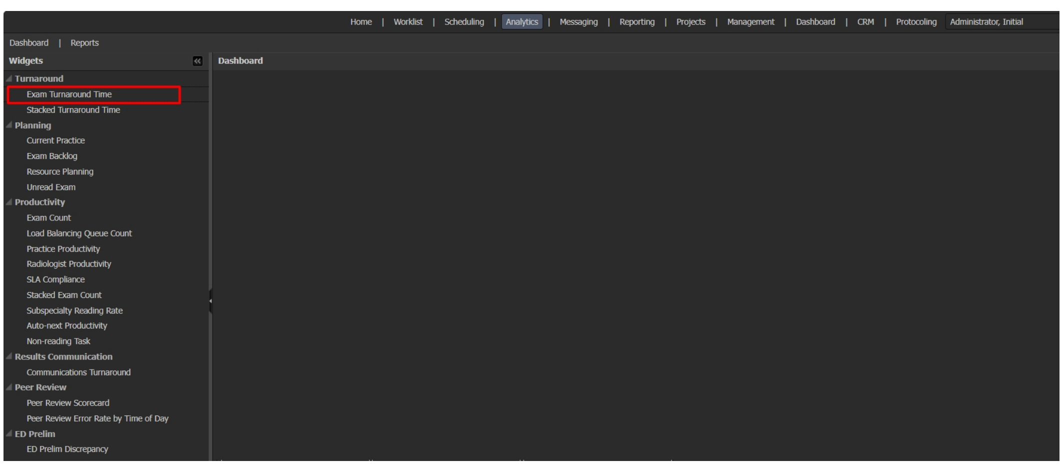
Widgets	Description
	● Y-axis: Exam Count = number of exams in a Final status. ● X-axis: Time = Day of Week or Month of Year. ● Stacked by: Modality, Radiologist, Site, Shift or Subspecialty.
Subspecialty Reading Rate	Shows the percent of exams tagged with a subspecialty that were read by a radiologist within the same subspecialty. Exams with multiple subspecialty tags may be counted more than once. Exams with an unknown radiologist will not be counted.
Auto-next Productivity	Plot monthly radiologist productivity measured by RVU or WU as a percent of exams read in auto-next mode. Each data point shows the total monthly RVU/WU for one radiologist.
Non-reading Task	Plot the number of hours reported for each non-reading task or interruption type. Export to see the breakdown by radiologist, shift, and reading location. The widget is applicable for InteleOrchestrator version 4.3 and earlier.
Communications Turnaround	Measure communication turnaround time by communication type. The communication turnaround time bubble chart displays three dimensions of data: ● Y-axis: Communications Turnaround time = Completed Timestamp - Created Timestamp. ● X-axis: Communication type. ● Bubble size: Communication note count
Peer Review Scorecard	Displays peer review activity for a selected radiologist, for a selected month, and for the year through the selected month. The peer review activity displays peer reviews received and performed by the selected radiologist and compares these to the group at large. You can filter by modality, site and by priority. If no selection is made on these filters, the scorecard will include all modalities, sites and priorities. From the scorecard you can view messages entered on peer reviews for the selected month. The scorecard can be exported to the Excel spreadsheet.

Widgets	Description
	Users with the 'All radiologist access' user permission can select any user from the radiologist dropdown menu. Without this permission, they will only have current user available for selection.
Peer Review Error Rate by Time of Day	Plot the number of unfavorable peer reviews and corresponding error rate as a function of time of day.
ED Prelim Discrepancy	Plot the number of ED Prelims and the percentage resulting in discrepancy. The ED discrepancy mixed series chart displays three dimensions of data: ● Left Y-axis: ED Prelim Note count = number of ED Prelim Notes in a Complete status. ● Right Y-axis: Percentage with Discrepancy = Percent of ED Prelim Notes in a Complete status that resulted in a discrepancy. ● X-axis: Time = Hour of Day, Day of Week, or Month of Year.

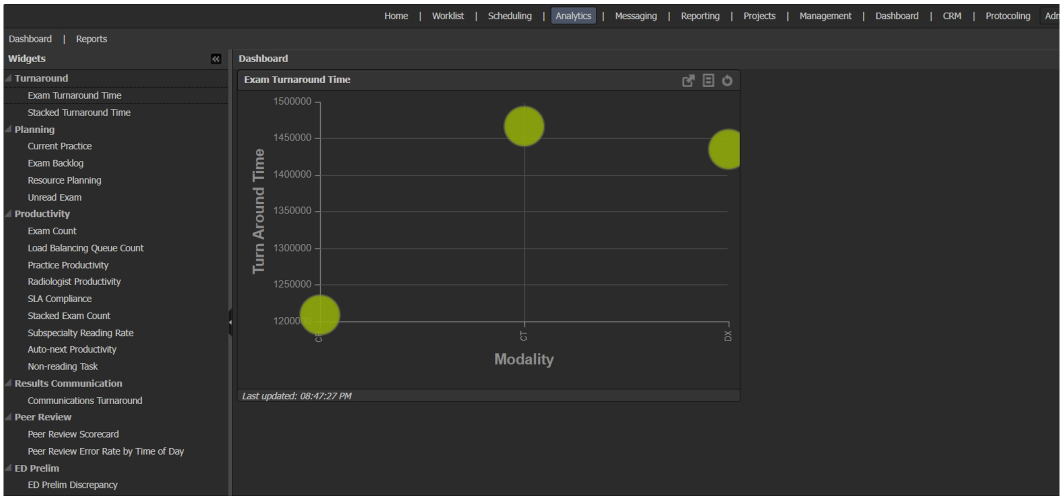
Applying Widgets

To add widget to dashboard:

1. Click on a widget name in the widgets panel on the left side of the dashboard.



2. The selected widget is displayed on the main section of the dashboard.

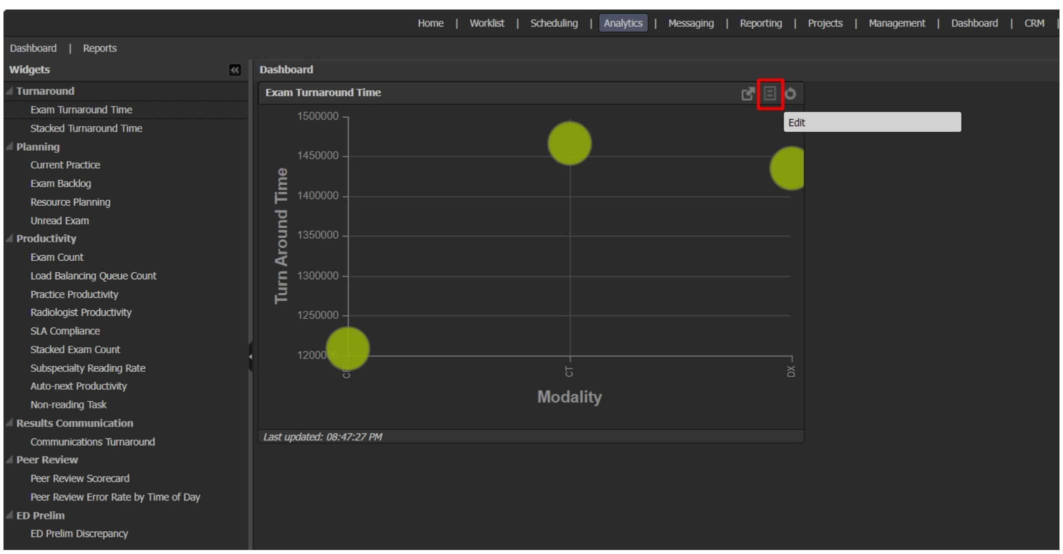


The same widget can be selected and added to your dashboard more than once.

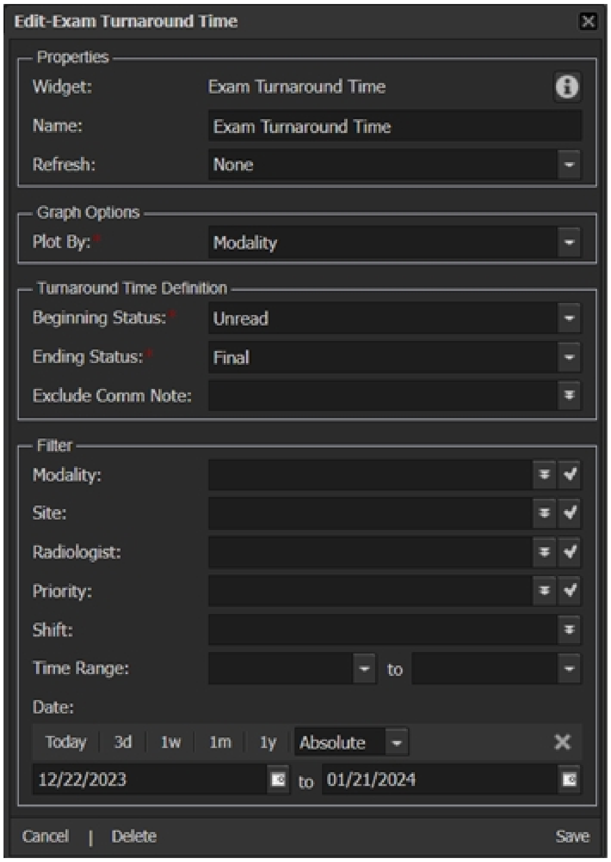
Add the same widget multiple times with different properties and filters applied.

To edit widget:

1. Click the Edit icon in the upper right-hand corner of the widget.

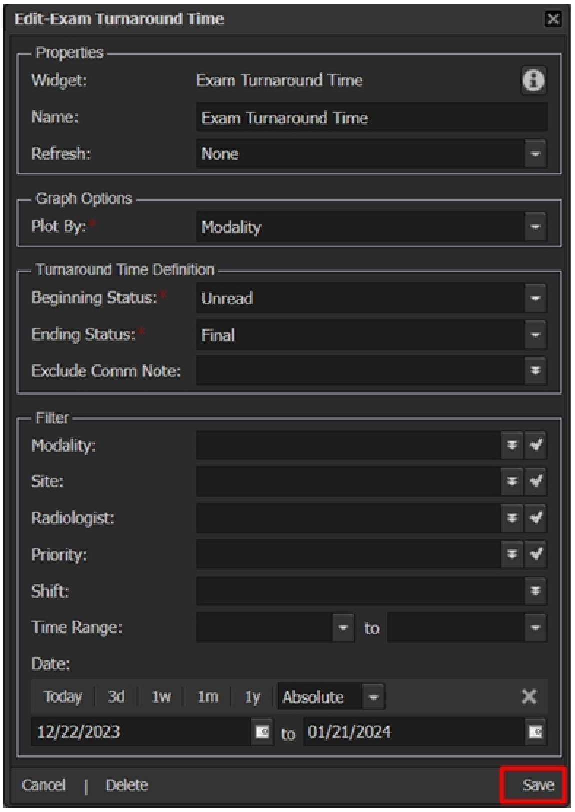


2. Enter the criteria you would like to view in the widget.



Users with only view permissions are currently unable to select options from the site dropdown menu.

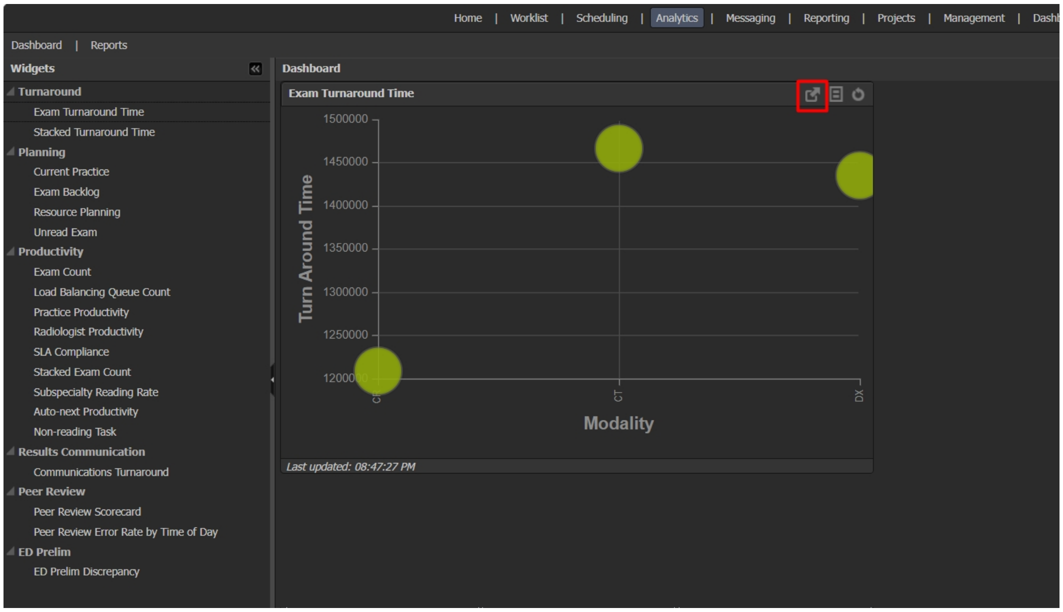
3. Click **Save**.



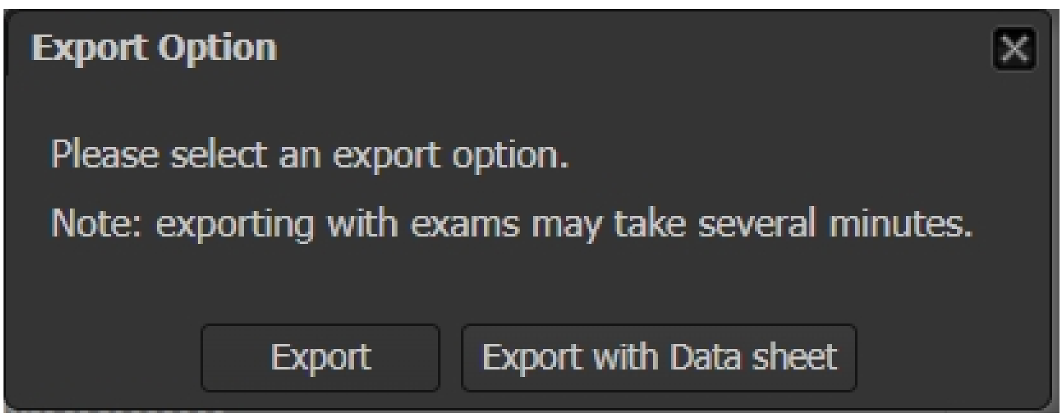
⚠ Caution: Adding excessive widgets that are set to refresh can negatively impact performance. This is especially true when the refresh frequency is high.

To export widget data:

1. Click the Export  icon.

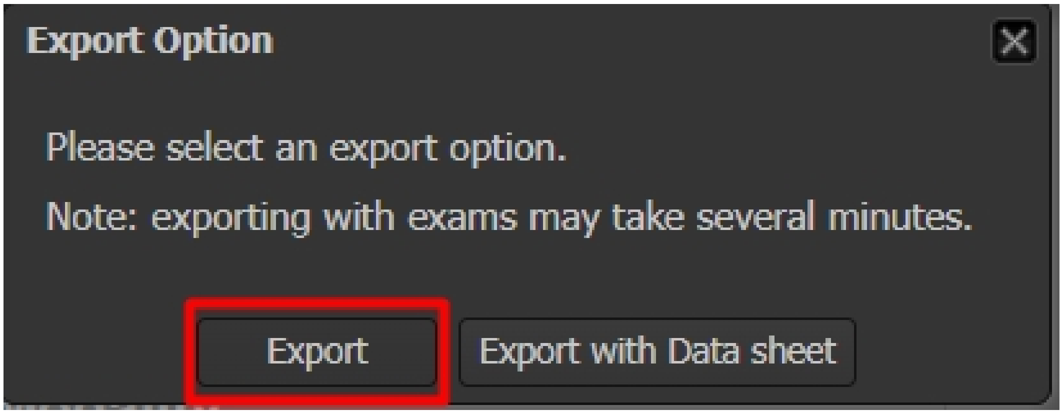


2. A pop-up will appear.



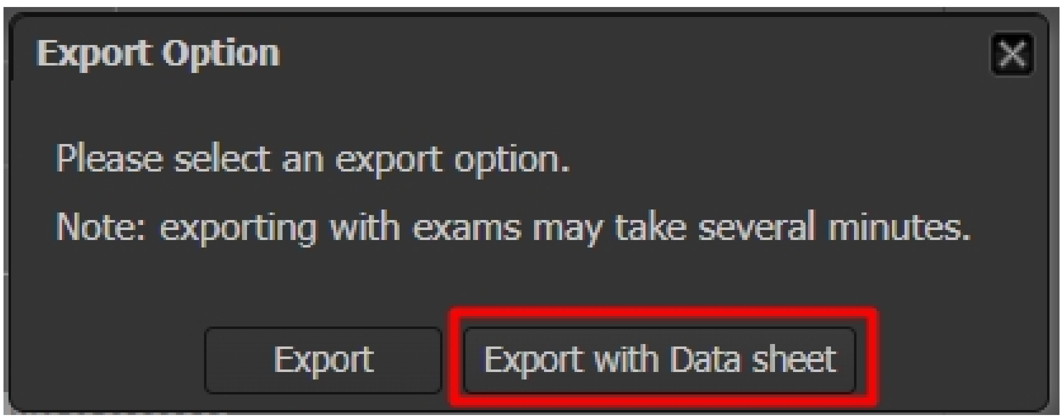
3. Select an export option:

   - Click **Export** to export to an Excel file, a quick view of the information seen in the widget. This view only shows the Summary and the Options tabs.



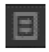
The exported data is presented in the UTC time zone.

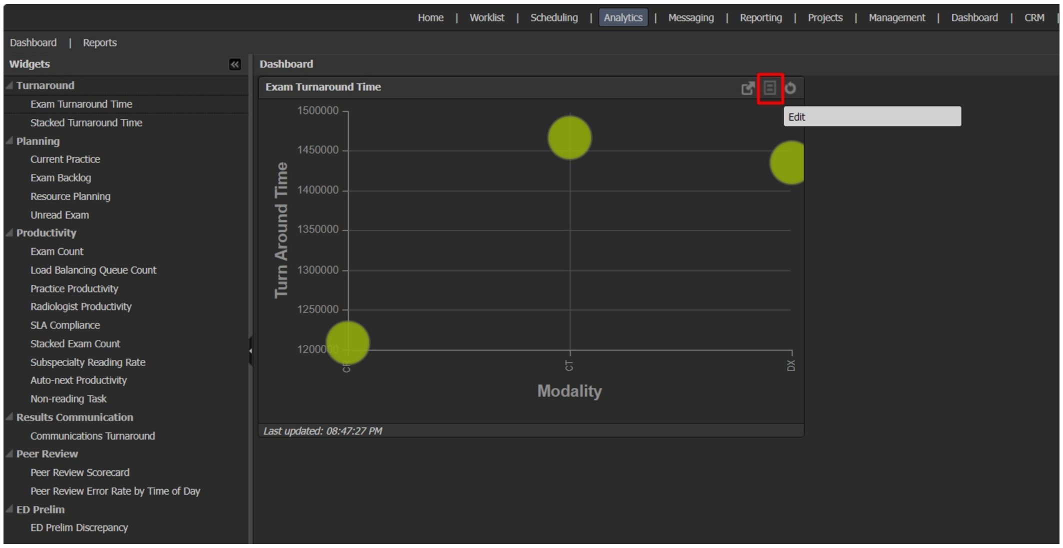
- Click **Export with Data sheet** to export to an Excel file all information, including the exam details.



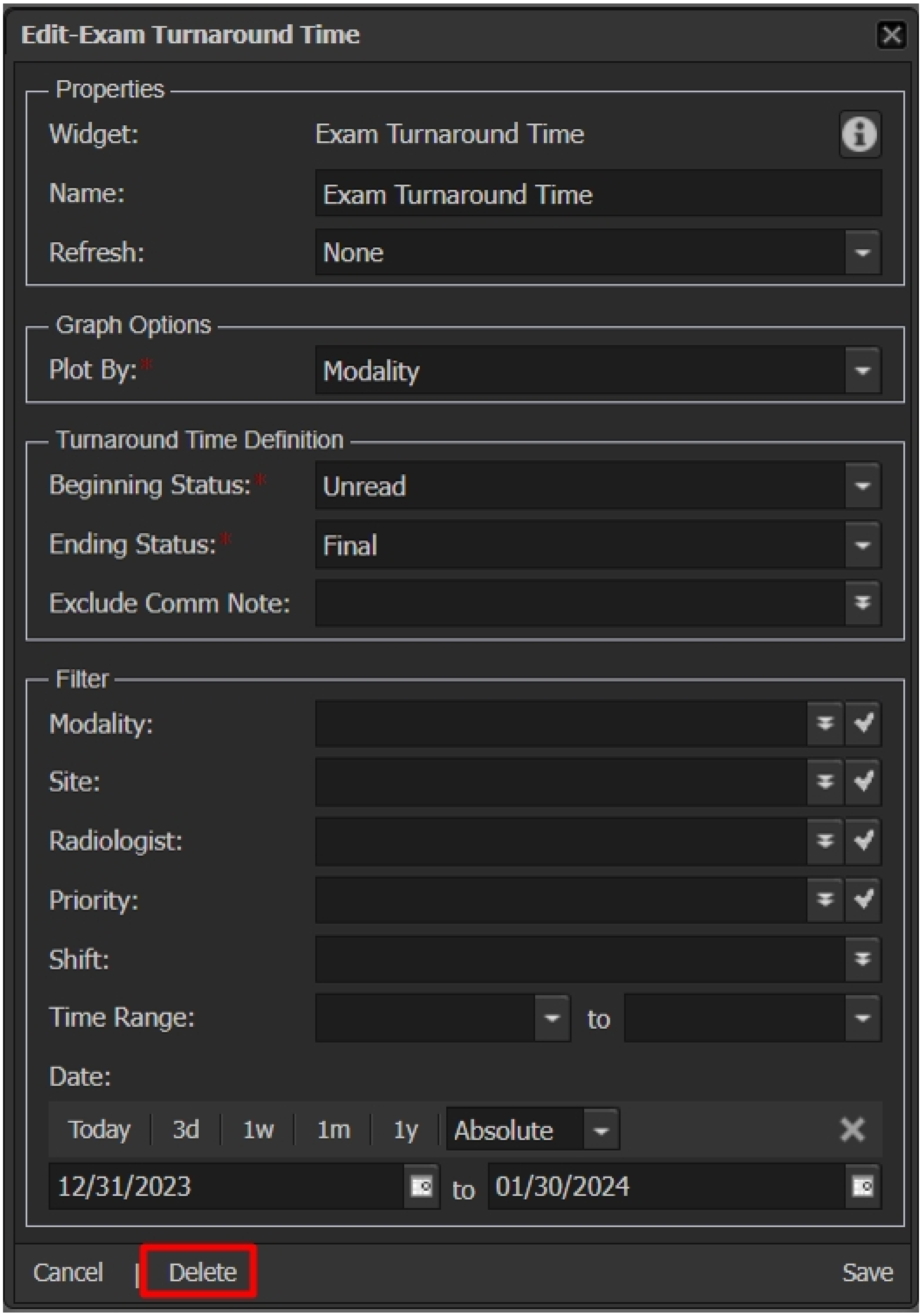
Users must have the Add Exams sheet to widget export permission.

To delete a widget from the dashboard:

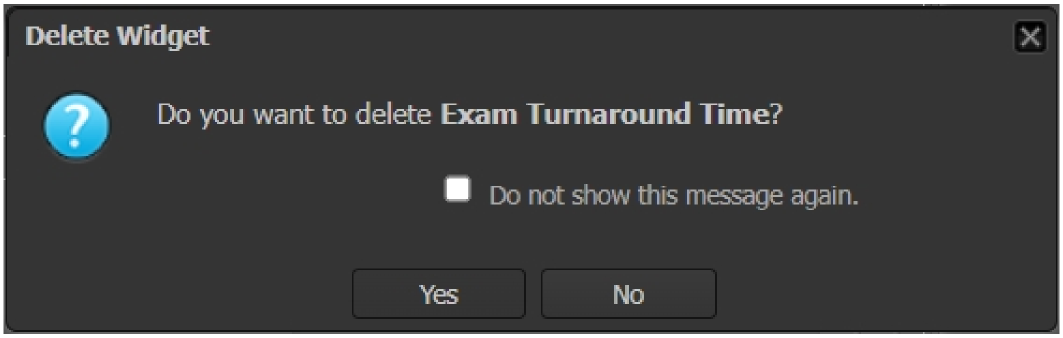
1. Click the Edit icon  in the upper right-hand corner of the widget.



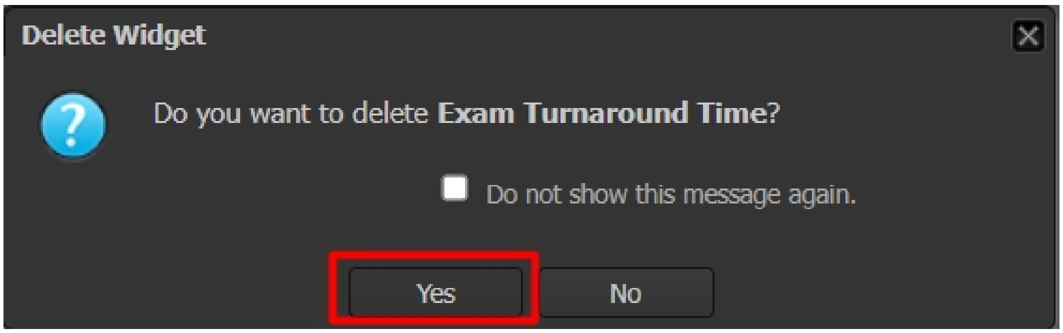
2. Click **Delete**.



3. A pop-up will appear.



4. Click **Yes**.



The Delete Widget is useful to remove any extra copies of a widget when you have added multiple copies of a widget on the dashboard by mistake.

Reports

The Reports module provides enterprise-wide reporting capabilities, offering a comprehensive view of data across the organization.

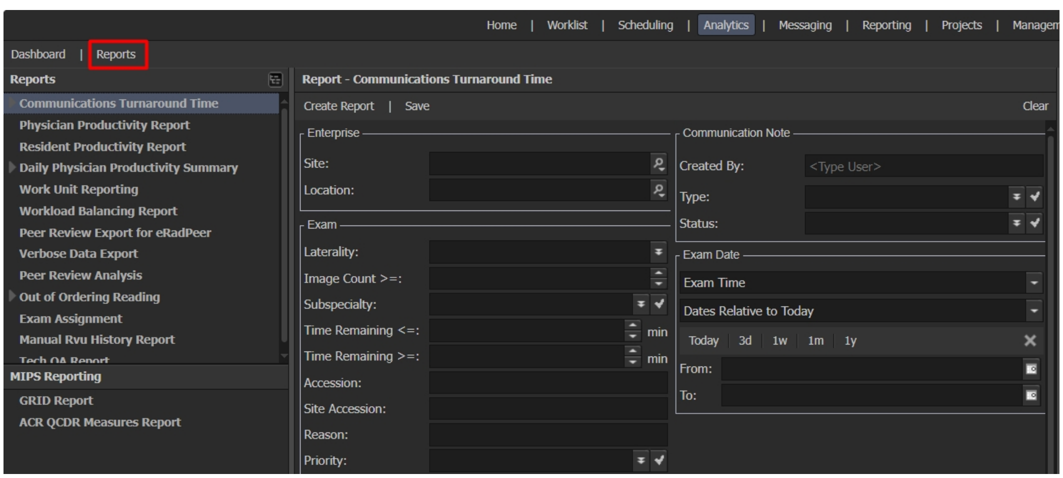
Reports can be accessed through the Analytics module. Reports are downloadable in Excel format, can be scheduled for auto-generation, and can be sent via email to recipients in a password-protected format.

Each report is permission-based, and permissions are configured in the Management module under **User Role Management**.

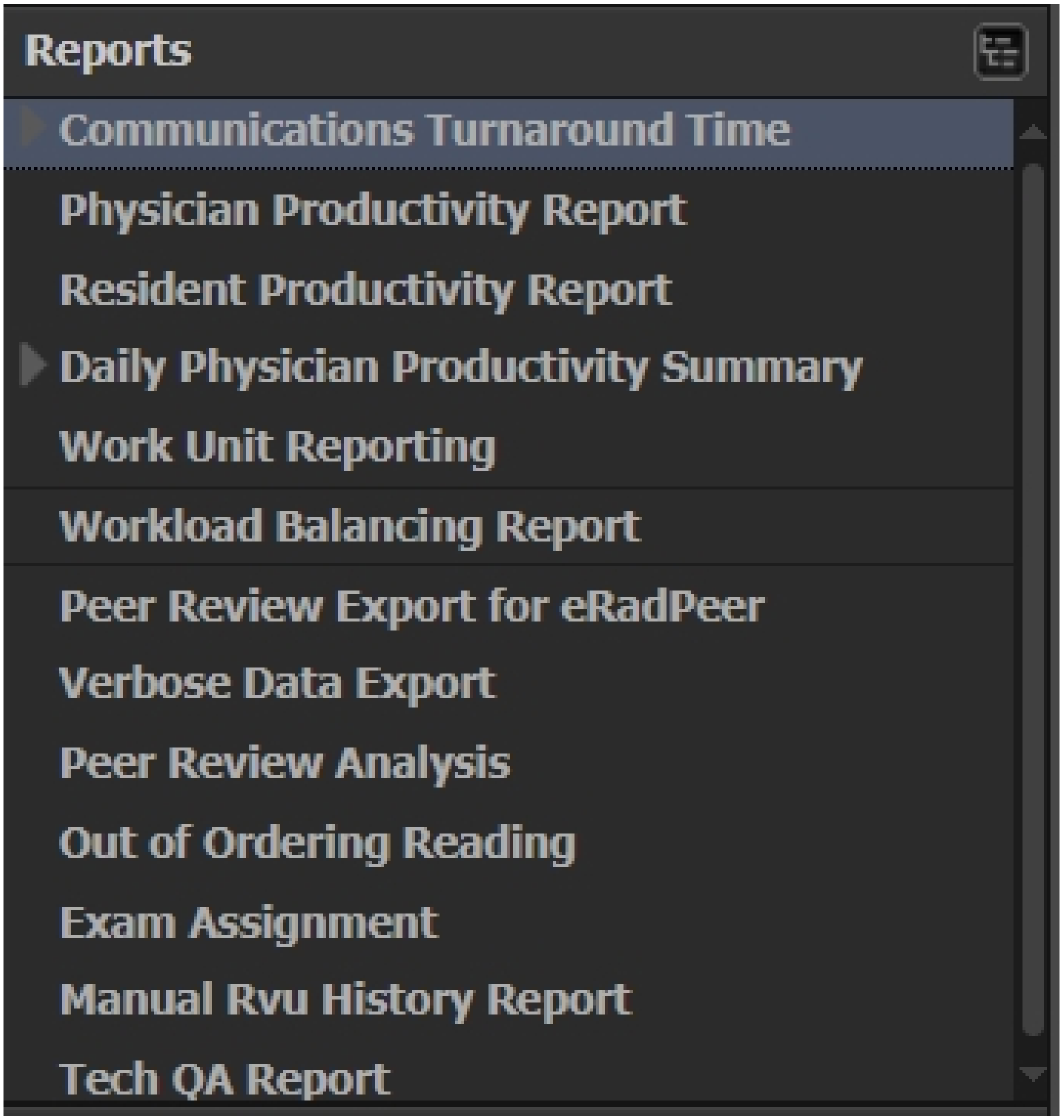
To view available reports:

1. From the Home page, click **Analytics**.

2. Click **Reports**.



3. The list of reports is displayed.



The list of reports displayed here is for InteleOrchestrator version 4.5.

The following reports are available for InteleOrchestrator version 4.5, 4.4 and earlier:

Reports	Description
SLA Compliance	This report summarizes exam turnaround time into predefined time brackets and by priority, modality or patient type. The report includes a summary page showing the number of exams that meet each turnaround time bracket. Individual exam details are included on subsequent tabs for all exams and for each exam priority. Available in InteleOrchestrator version 4.4 and earlier.
Communications Turnaround Time	This report provides a detailed breakdown of communication turnaround times for each exam. Turnaround time is presented in

Reports	Description
	the format Days:Hours:Minutes.
Physician Productivity Report	This report provides a detailed breakdown of physician productivity, both overall and categorized by exam and facility. The report includes measurements of RVUs or Work Units and turnaround time.
Resident Productivity Report	This report provides a detailed breakdown of resident productivity, encompassing overall, by exam, and by facility. The report incorporates measurements of RVUs or Work Units and turnaround time.
Daily Physician Productivity Summary	This report offers a summary for each radiologist assigned to a shift, presenting shift details, login session information, the number of exams read, total RVUs generated, and the number of peer reviews performed. The summary table calculates practice totals and averages. A radiologist must be assigned to a shift to be included in this report, and only exams read by a radiologist assigned to a shift are included in the summary.
Work Unit Reporting	This report summarizes procedure work unit totals. Work units are calculated per modality and totaled by site and radiologist. The report includes measurements of WU, RVU, and turnaround time per exam. The values for WU and RVU can be configured in your management pages.
Workload Balancing Report	This report summarizes work units and load balancing gauge results. Results are calculated per radiologist based on the time interval start time. The Work Unit goal per time interval can be configured in your management pages.
Peer Review Export for eRadPeer	This report generates an XML file for upload to eRadPeer™. Only peer reviews meeting the following requirements will be included in the export: • Reviewer and reviewee must have a RadPeer ID saved in their profile. • Group ID and Site Code(s) must be defined in the configuration file. • Exam modality must be one of the following: DX, US, CT,

Reports	Description
	MR, NM, MG, IR, PT.
Verbose Data Export	This report summarizes all exams within a specified date/time range. ⚠ Caution: Users should select a limited range to avoid performance impact.
Peer Review Analysis	This report provides detailed information on peer reviews for each exam. The report includes a summary page summarizing peer review results by the receiving radiologist, performing radiologist, and modality. Additionally, it contains a detailed listing of each peer review. Radiologist names can be anonymized.
Out of Order Reading	If users are configured to enter a reason for reading an exam out of order, the Out of Order Reading report will provide a summary showing the number of exams read out of order and the number of exams skipped in auto-next for each radiologist. Exam details are provided on additional tabs. One tab displays the exams read out of order and up to 10 of the exams skipped to read that exam. The other tab shows exams that were marked as skipped in auto-next.
Exam Assignment Summary	This report provides a summary of exam assignments made manually and by the assignment engine.
Manual RVU History Report	This report provides a summary of the RVU and Work Unit credits assigned to RVU tasks.
Tech QA Report	Generates a report with Summary page and an Exam Details page. The Summary page shows a count of Tech QA Notes for each technologist, in total and broken down by modality. The Exam Details page shows every Tech QA Note generated during the report time frame. The details include Location, Site Procedure, Modality, Technologist, Radiologist, Referring Physician, Rating, Message, Created By, Created On, Completed On, Note Completed By, Status, and MRN.

Generating Reports

You can view results from existing reports, create new reports or create custom reports, based on existing reports.

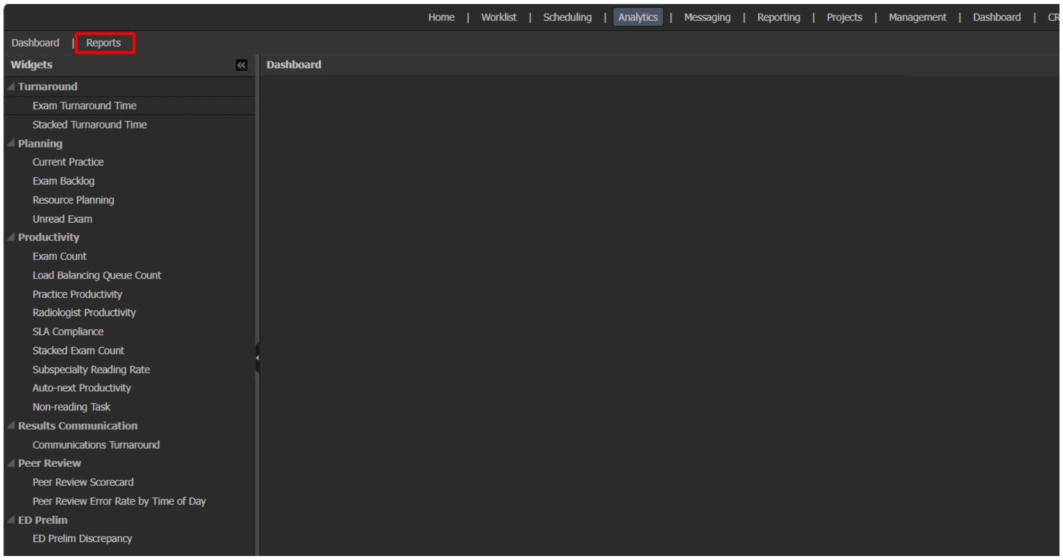
Creating a Report

Users can create, save, or schedule reports for automatic execution or email delivery. When a report is saved, the selected filters are stored under the report name in the report table. This allows users to access and download the report at any time.

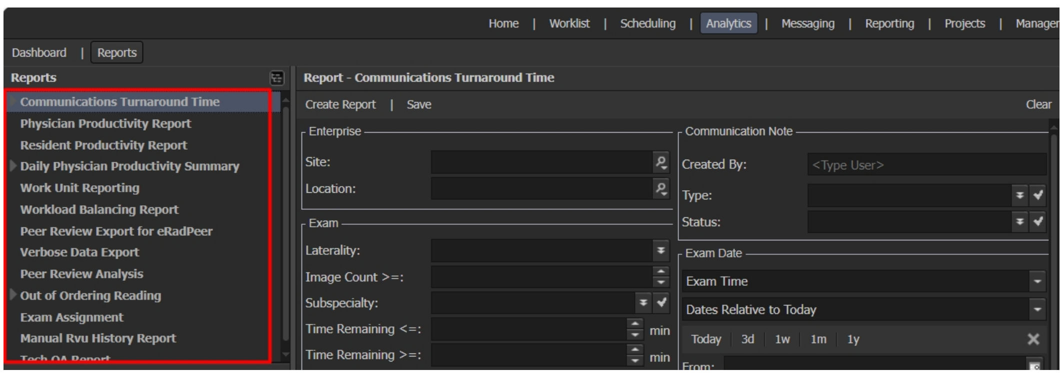
To create a report:

1. From the Home page, click **Analytics**.

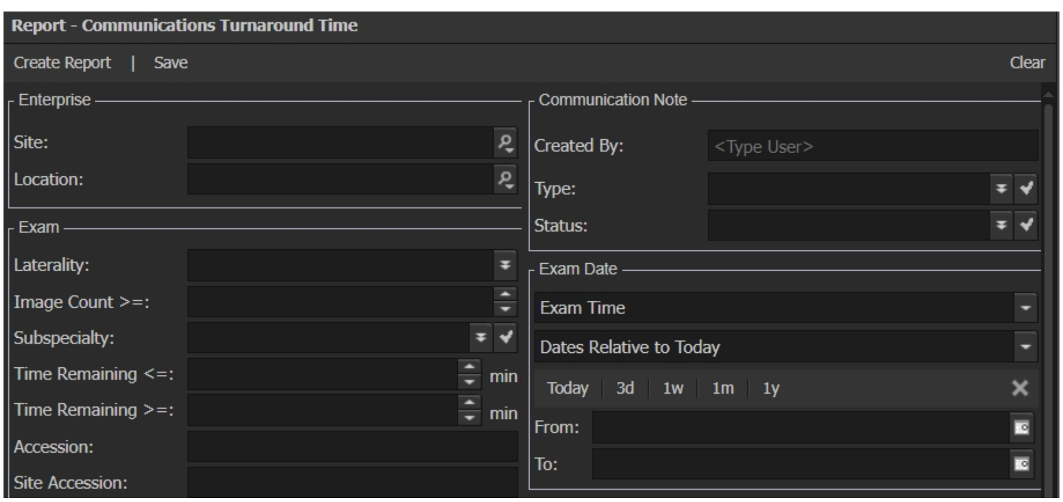
2. Click **Reports**.



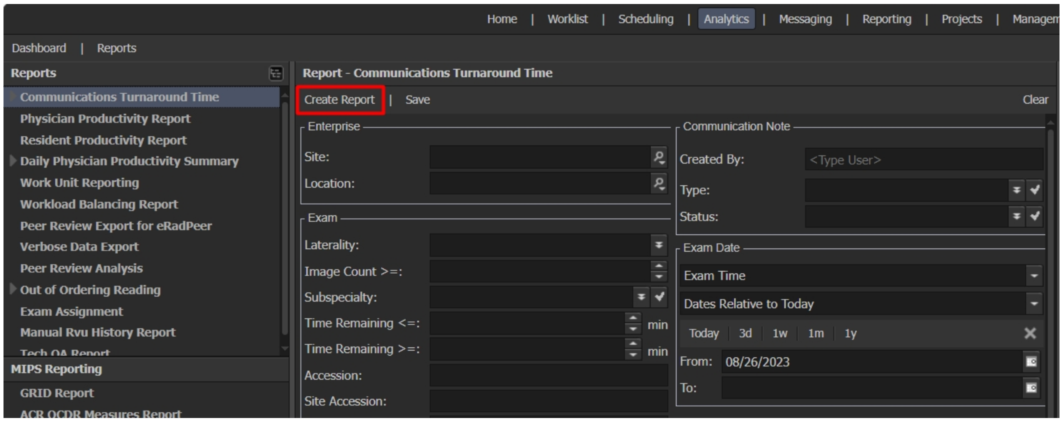
3. Select a report from the available list.



4. Apply the necessary filters to specify the criteria for data extraction.

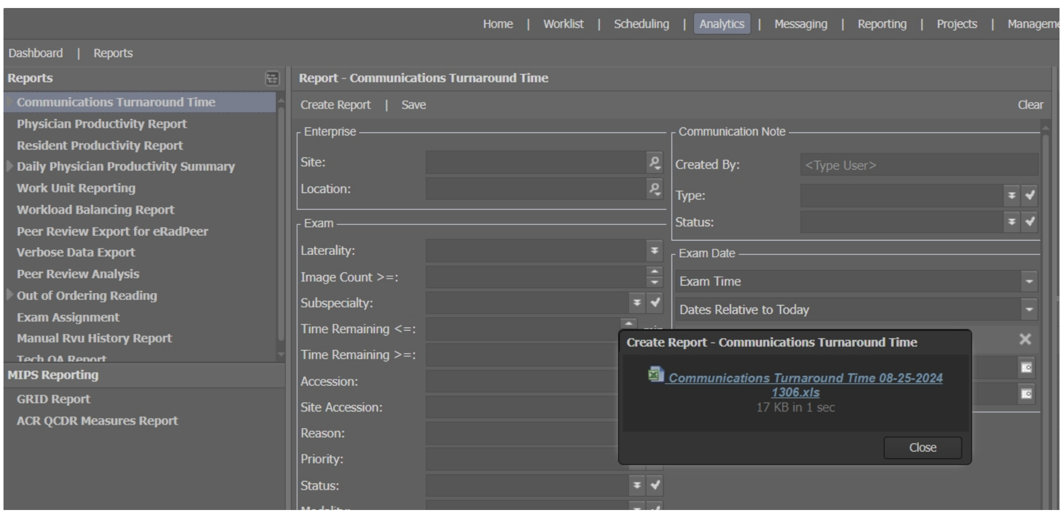


5. Click **Create Report**.

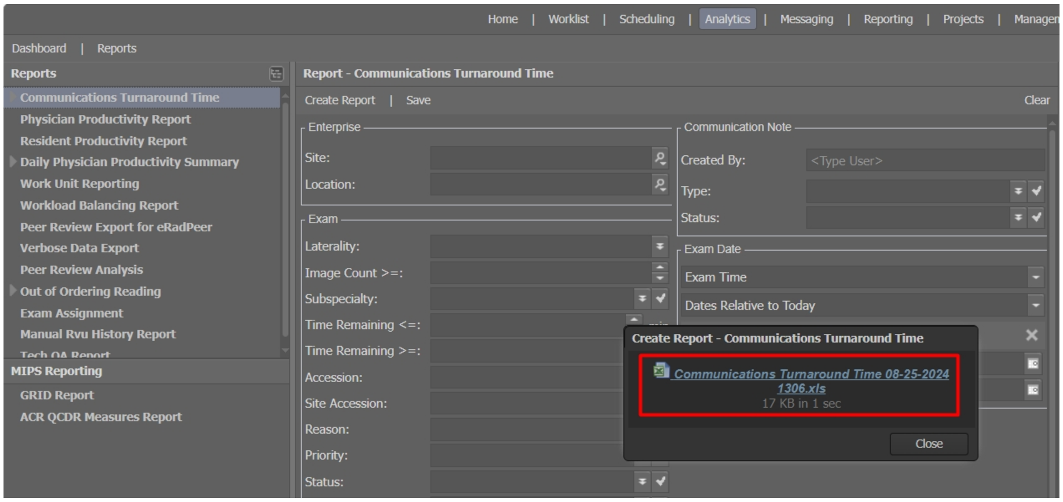


For larger reports, users could receive a pop-up notifying them that the report will take some time to generate. In such cases, they are advised to check back later.

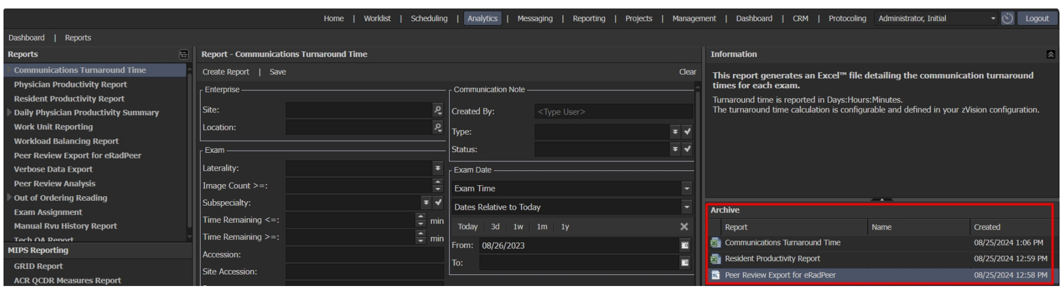
6. Upon successful report creation, a confirmation message will appear at the center of the Home page.



7. In the confirmation message, click on the InteleOrchestrator **Report** to start the download.

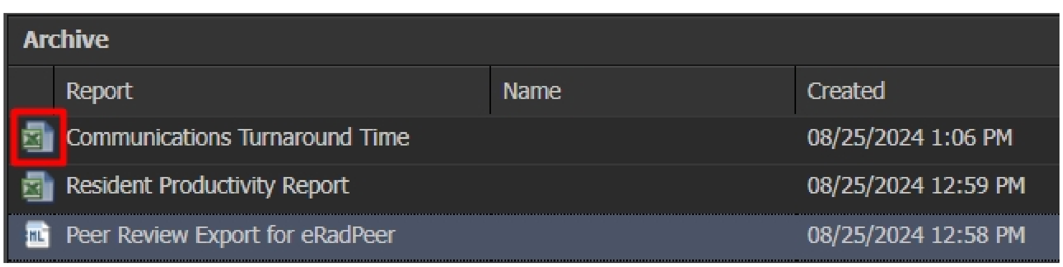


8. Once the report is downloaded, you can access the report in your **Downloads** folder.
9. If you did not download the report at the time it was generated, you can select the report from the Archive section.



The archive section displays the last 20 reports generated in total.

10. Click the Excel icon to download the report.



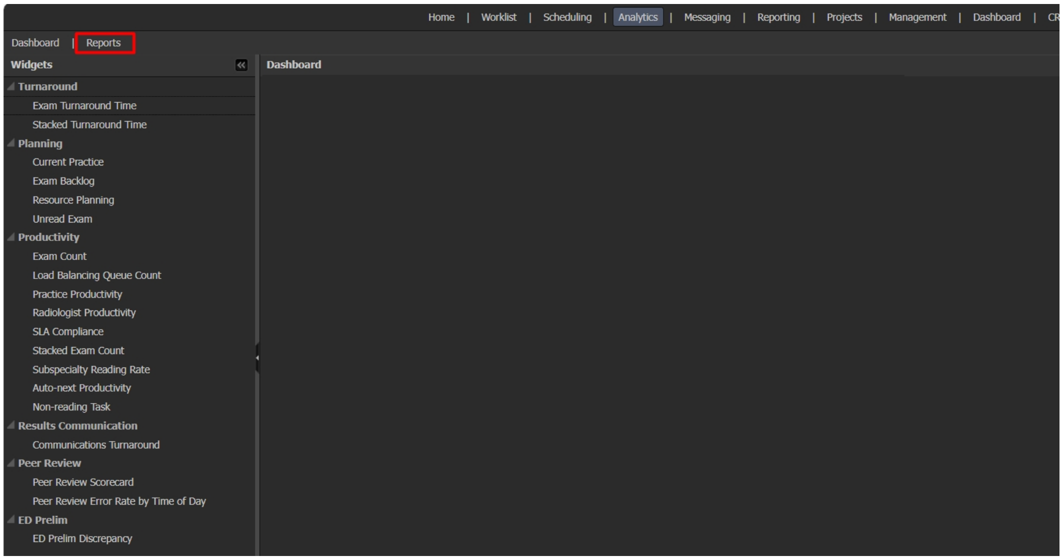
Save and Schedule a Report

In InteleOrchestrator, you can save reports to be regenerated later. You can also configure InteleOrchestrator to generate reports at set intervals. After being generated, InteleOrchestrator can send the reports via email, with optional password protection. For extra security, you can choose to save a copy of the report in your Archive section.

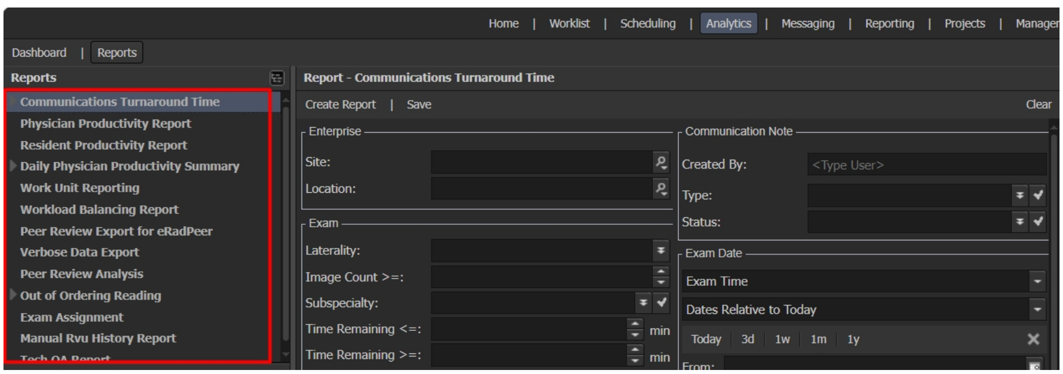
To save a report:

1. From the Home page, click **Analytics**.

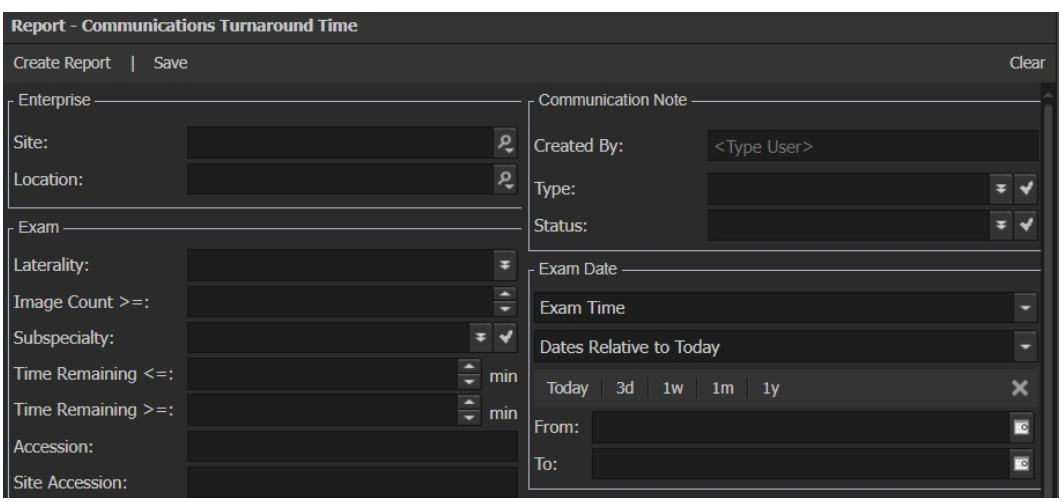
2. Click **Reports**.



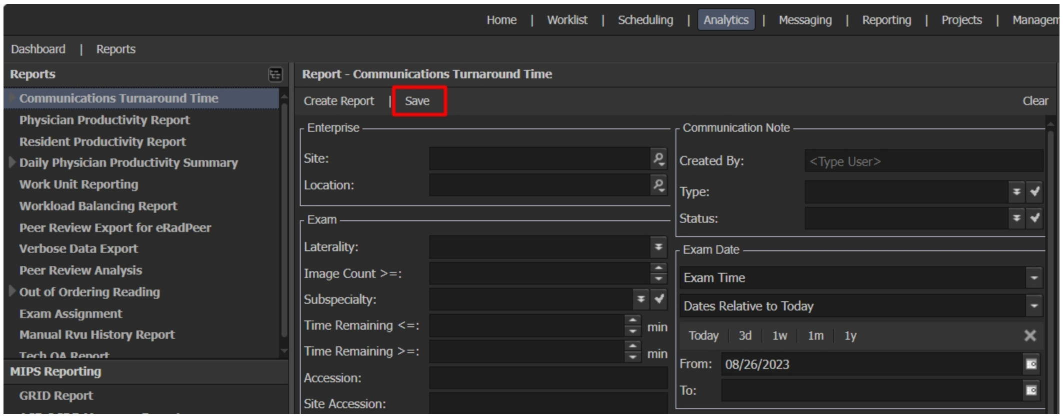
3. Select a report from the available list.



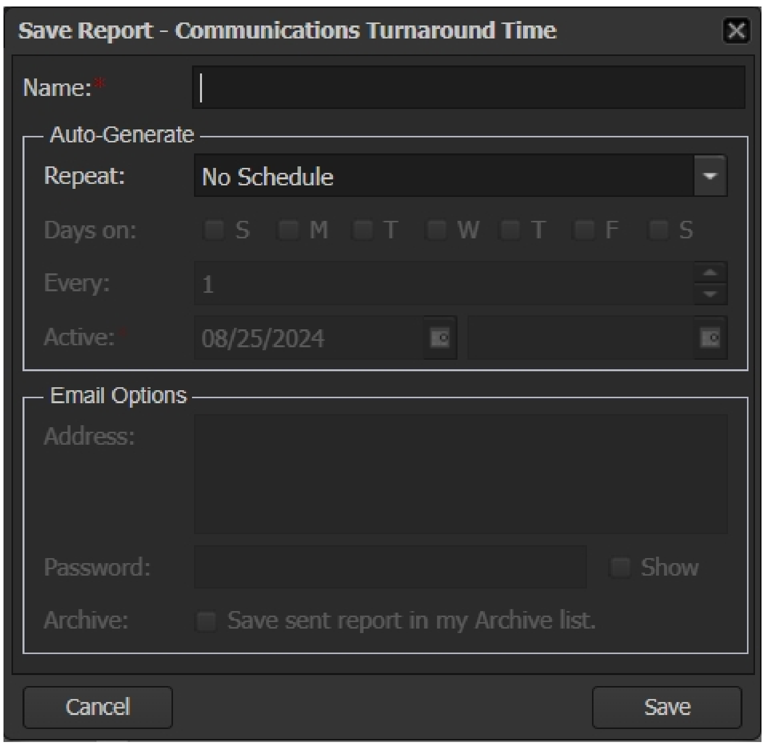
4. Apply the necessary filters to specify the criteria for data extraction.



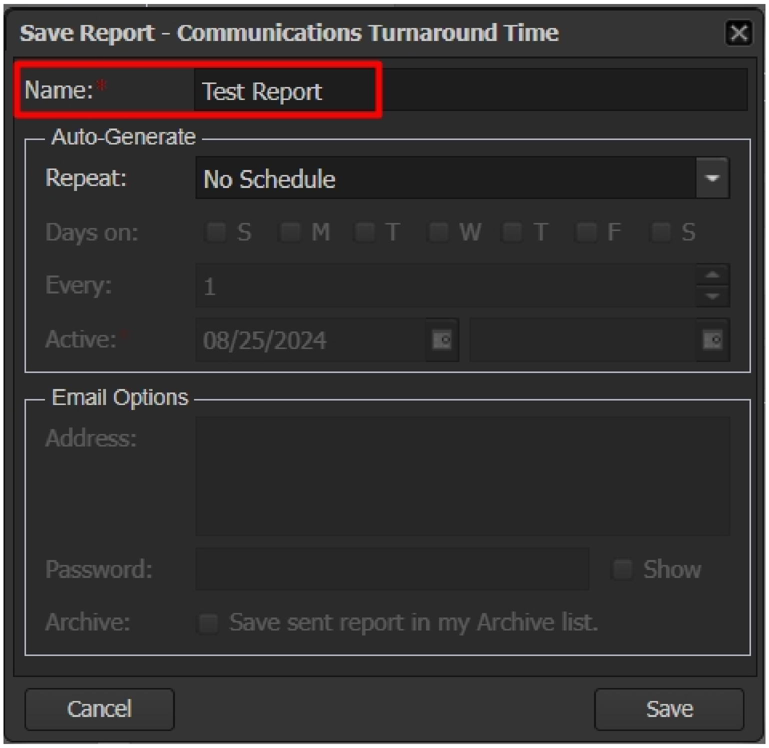
5. Click **Save**.



6. A pop-up screen will appear.



7. Add a name for the report.



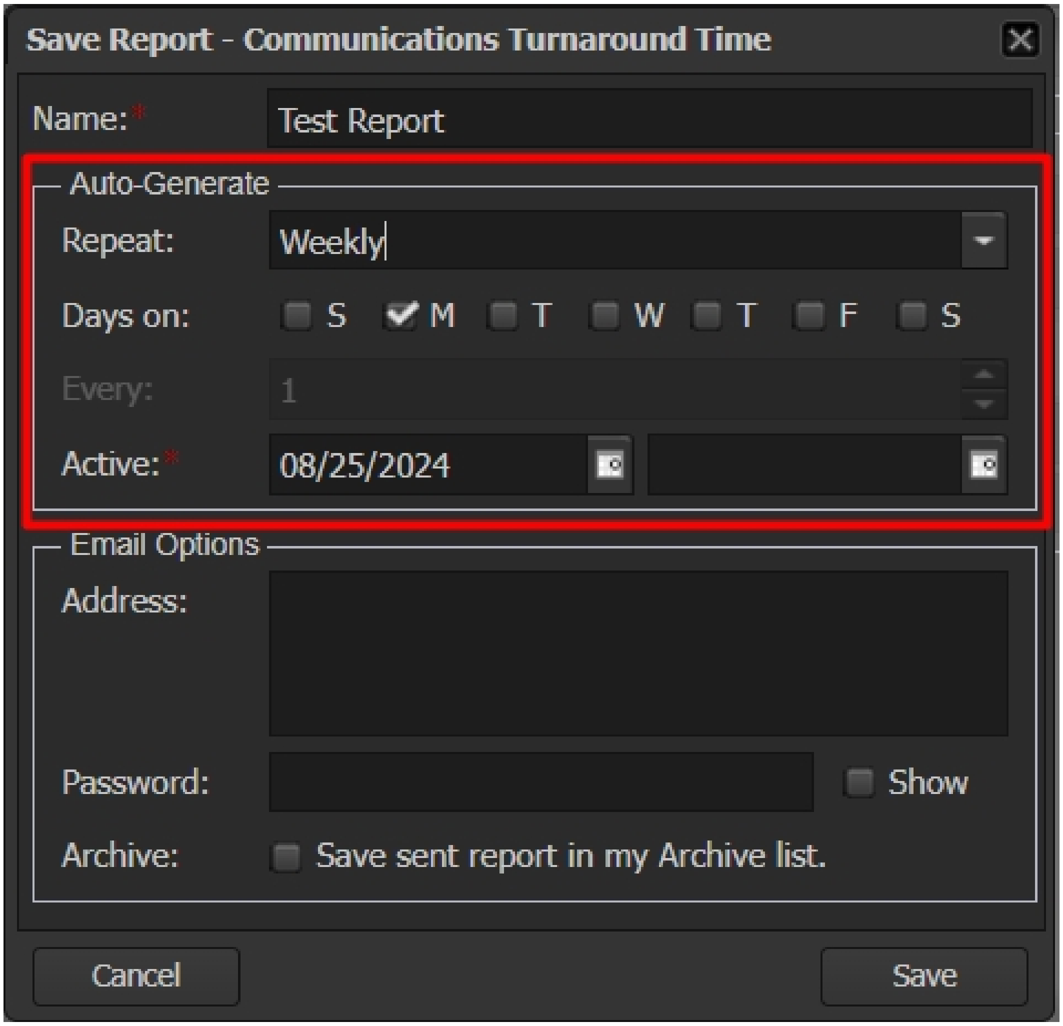
8. Set the frequency for report generation in the repeat field. The frequency can be set to:

   - **No Schedule**: To save the report to be manually generated when desired, in the Auto-Generate section, set Repeat to No Schedule. The report will not be emailed.
   - **Single**: The report is generated only once on the specified date.

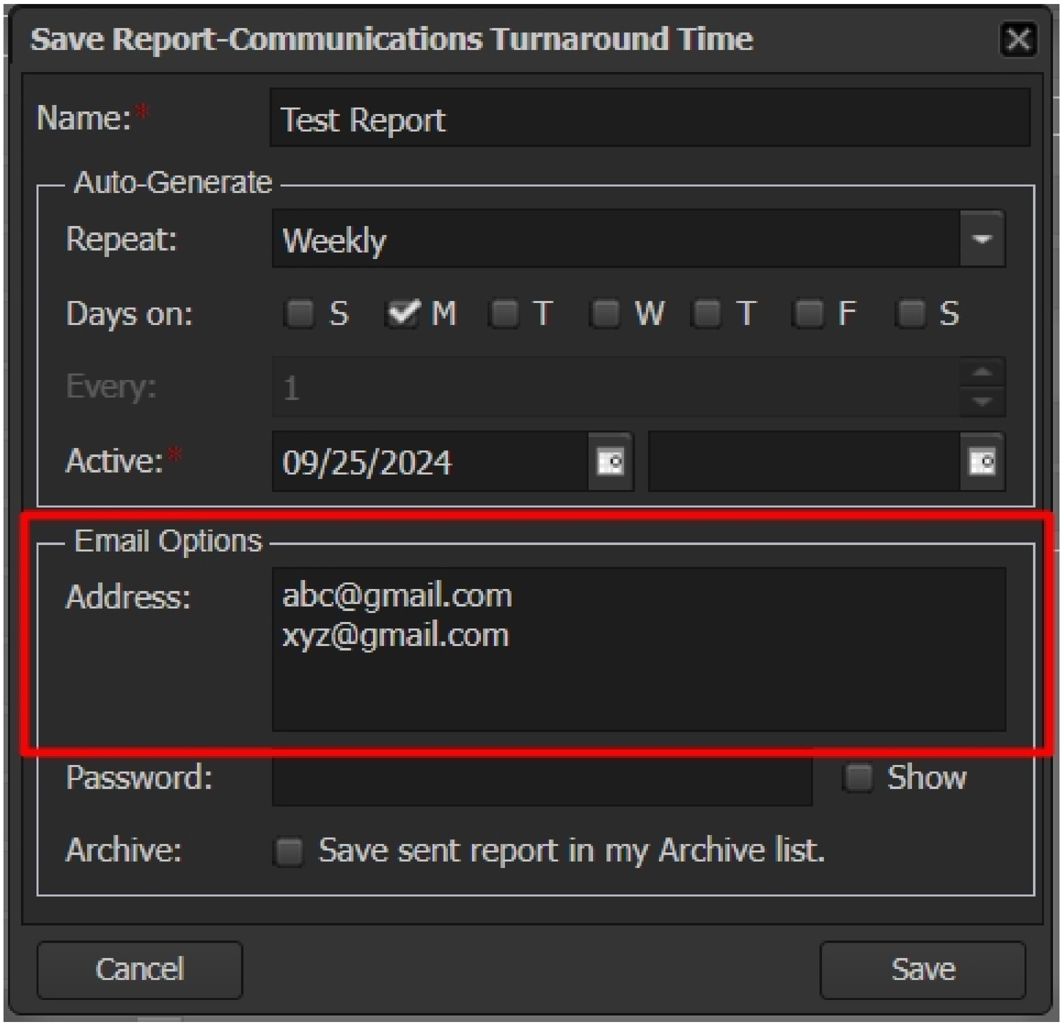
     If you save a report with a report interval to today (single repeat), setting the date to today, and this action occurs after the configured Report Start Time, the report may not generate as expected.

   - **Daily**: The report generation recurs daily. The **Every** parameter denotes the number of days. For example, Repeat: Daily + Every: 1 means the report is sent every 1 day.
   - **Every Weekday**: The report is generated every Monday through Friday, weekly.
   - **Weekly**: The report generation recurs weekly.

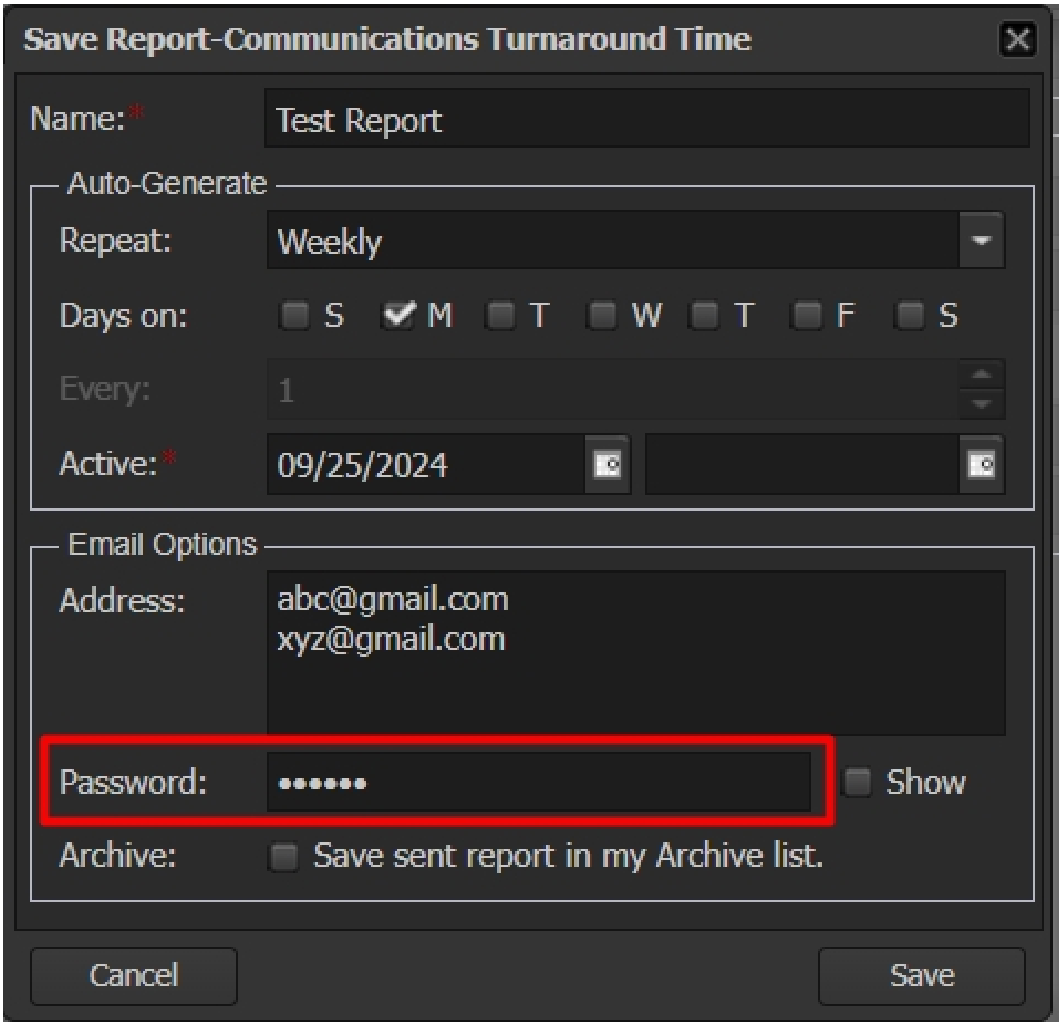
- **Monthly**: The report generation recurs monthly. The Every parameter denotes the number of months. For example, Repeat: Daily + Every: 1 means the report is sent every 1 month.



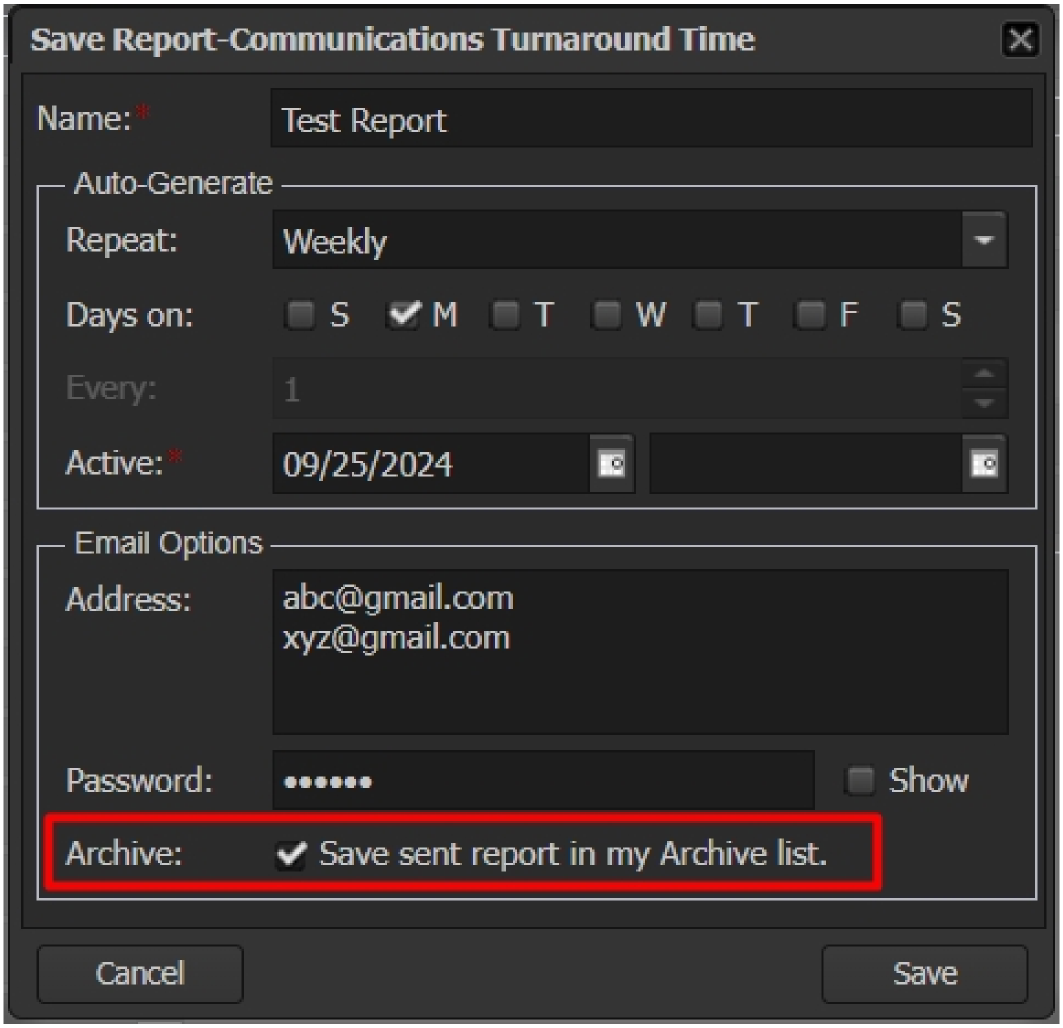
9. In the **Email Options** section, add the email address for each recipient of the report.



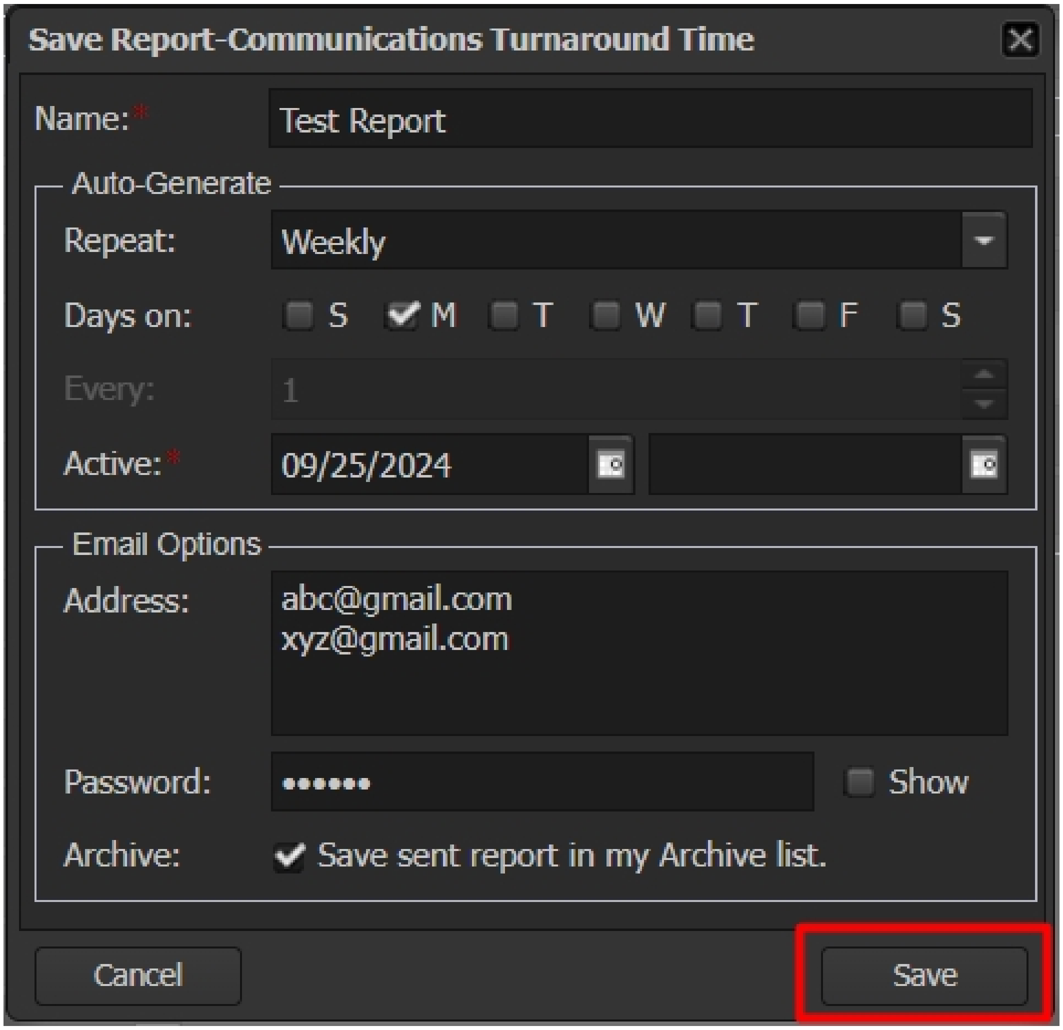
10. Enter a password to add password protection to the report.



11. Choose **Save sent report in my Archive list** to save a copy of the report to your archive list since the report is only sent to the recipients in the address field.



12. Click **Save** to complete scheduling the report.



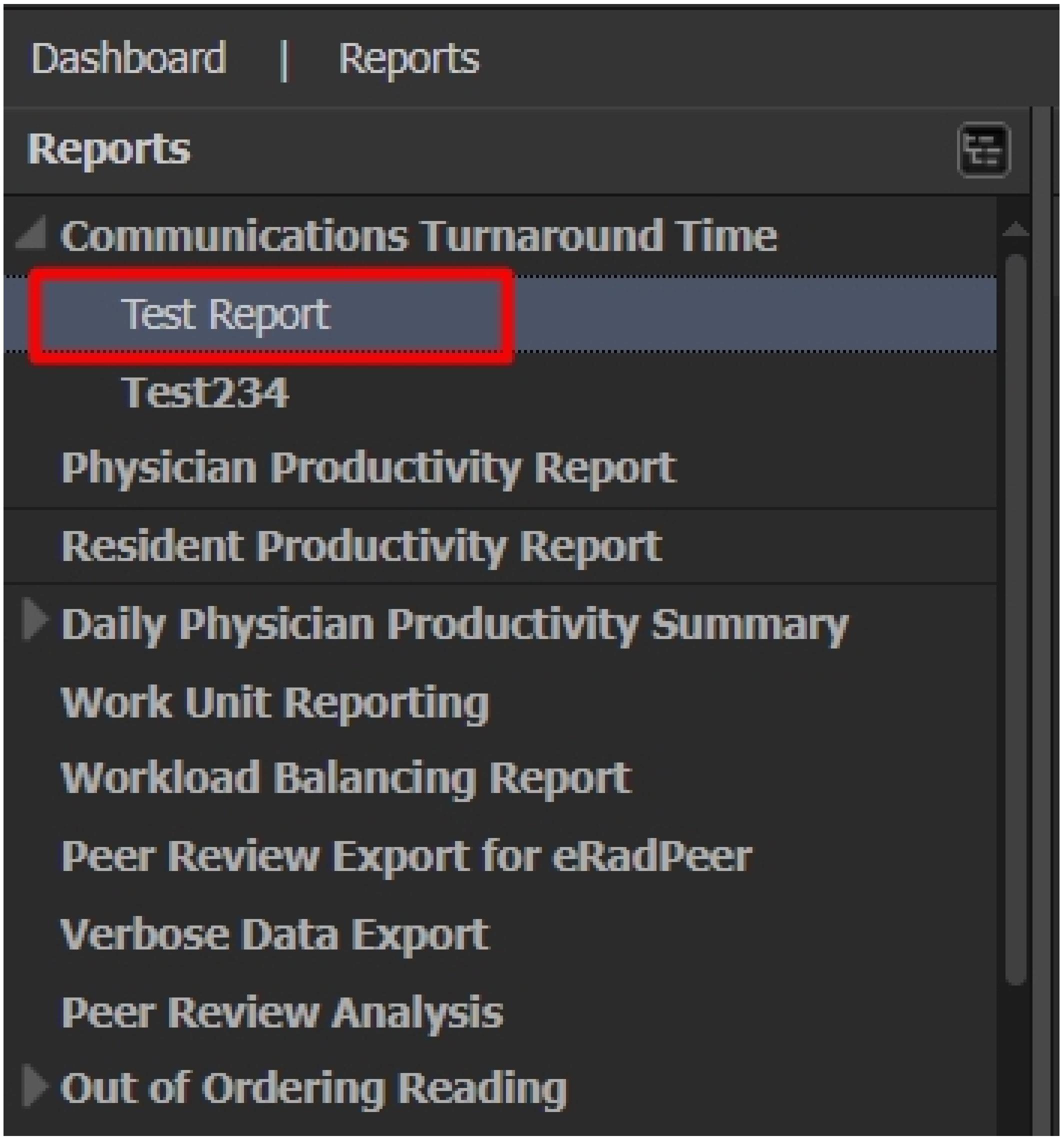
The same widget can be selected and added to your dashboard more than once.

Viewing Report History

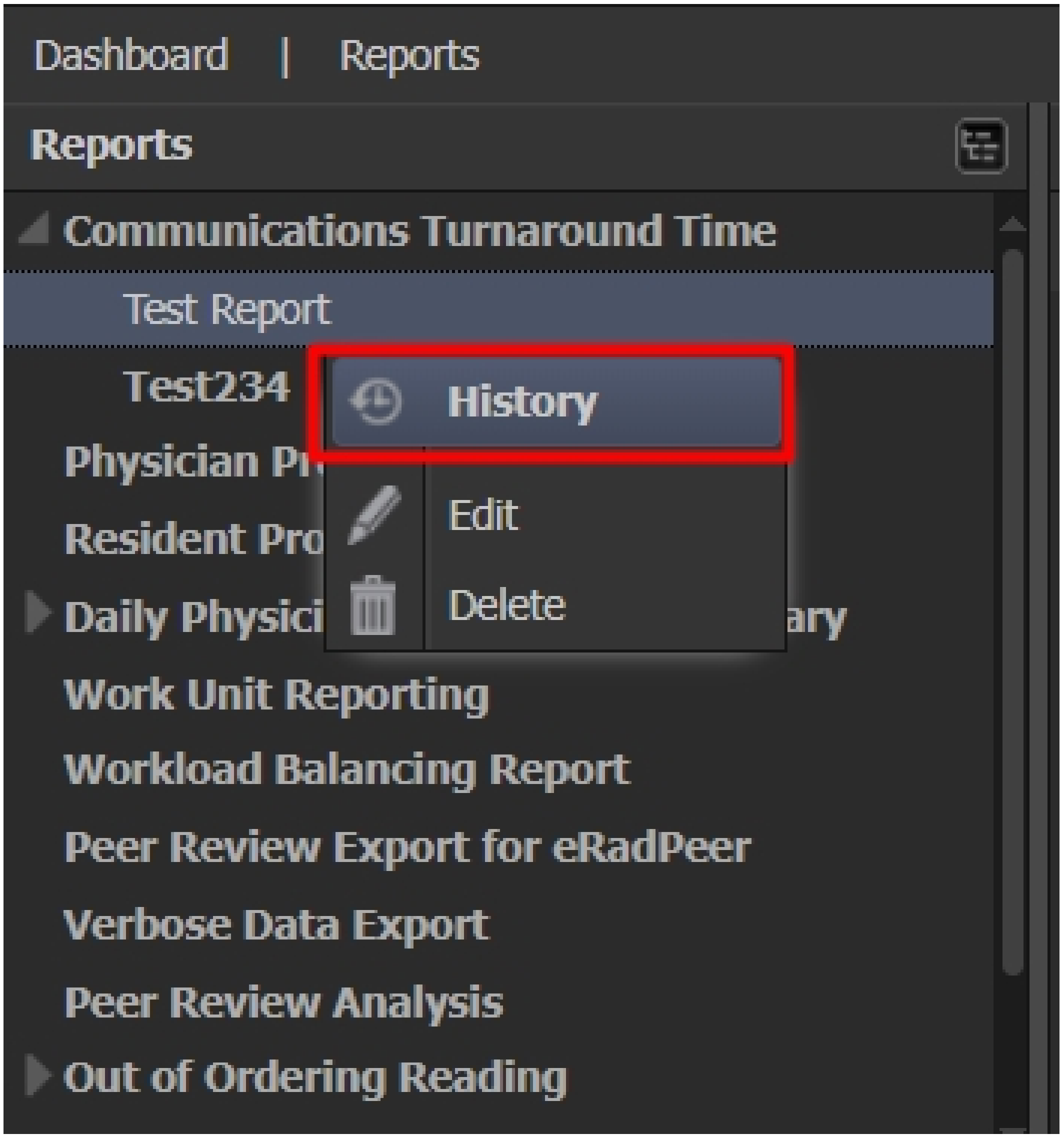
You can view the history of scheduled reports and all the previously generated reports.

To view the history of reports:

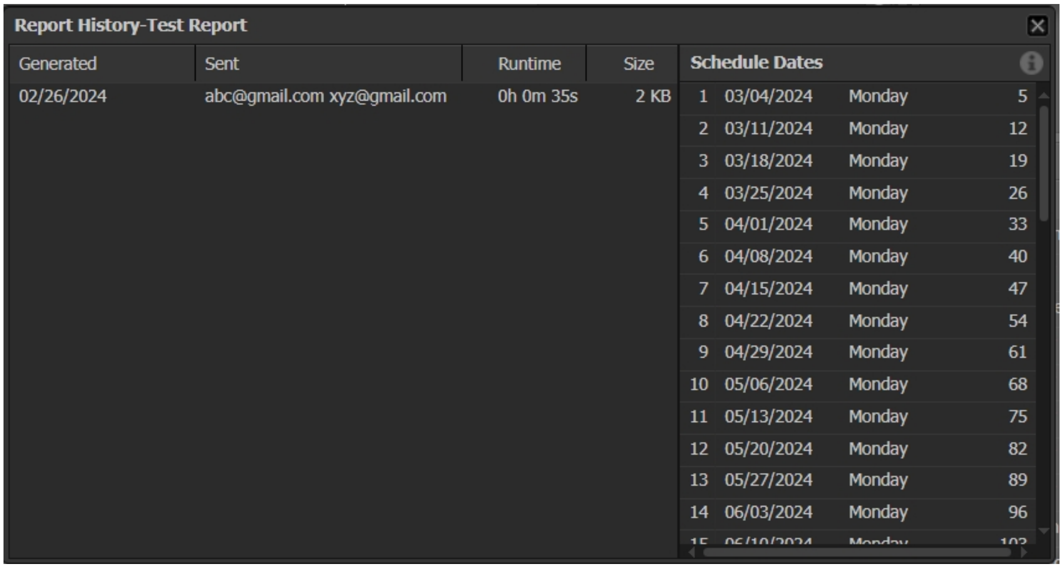
1. In the reports section, expand the report which was saved earlier.



2. Right click the scheduled report.
3. Click **History**.



4. Details of the scheduled reports are displayed.

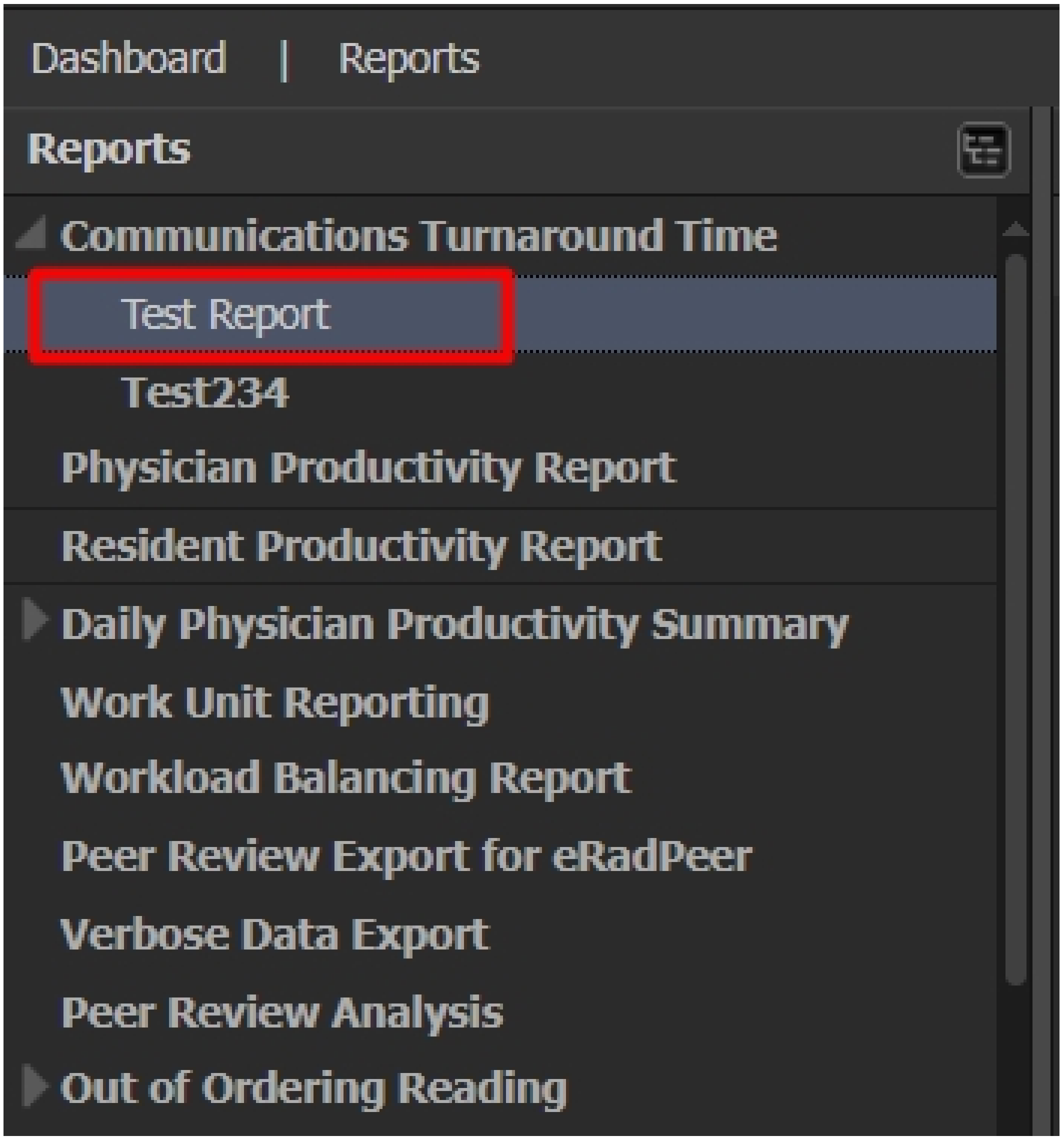


Editing the report scheduling

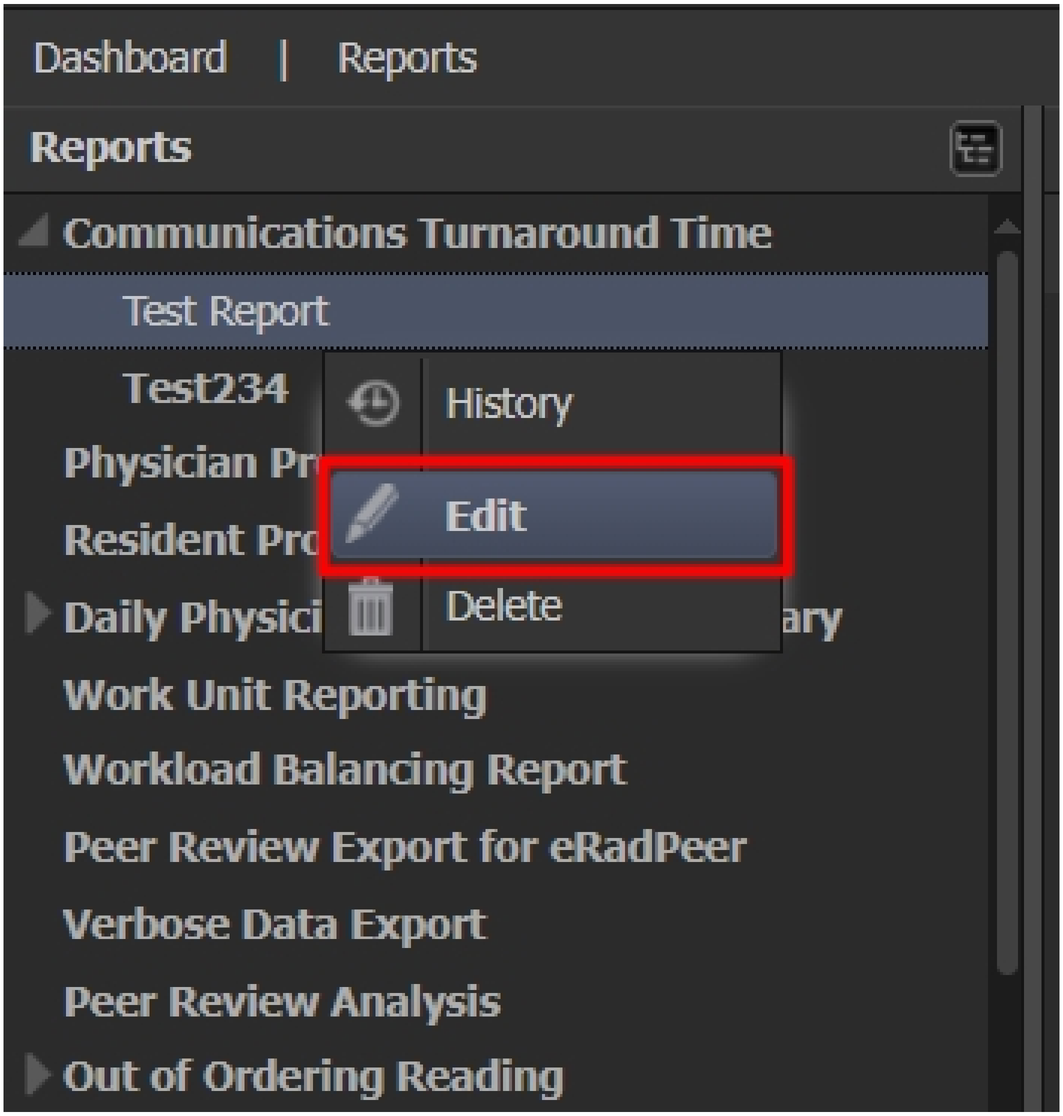
After viewing the report history, you may decide to change the frequency of the report, or the day report is emailed. You can make these changes to report scheduling without having to delete the old schedule and create a new schedule.

To edit the report's schedule:

1. In the reports section, expand the report which you want to edit.



2. Right click the scheduled report.
3. Click **Edit**.



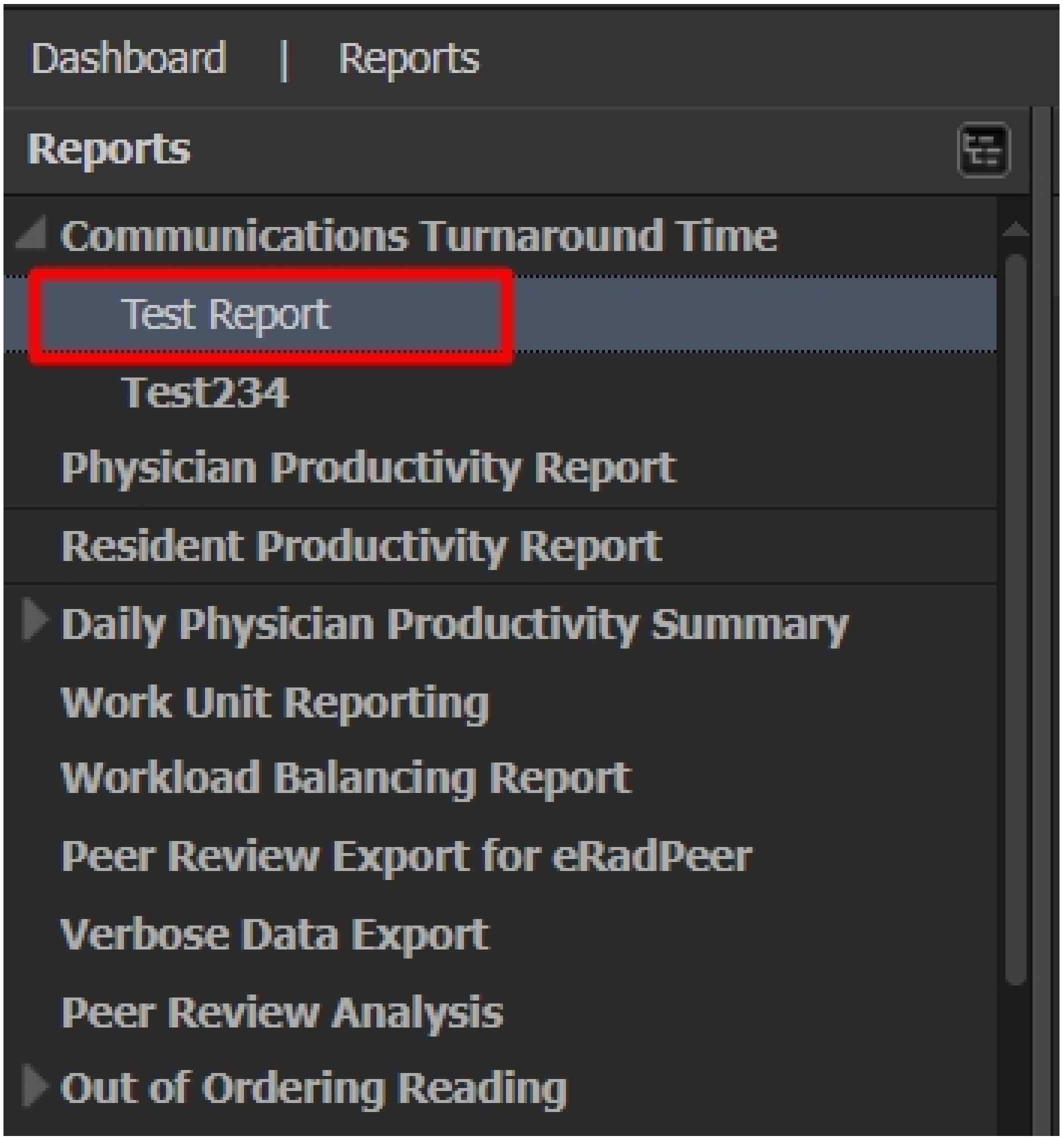
4. Make the desired changes to the schedule.
5. Click **Save**.

Deleting a Scheduled Report:

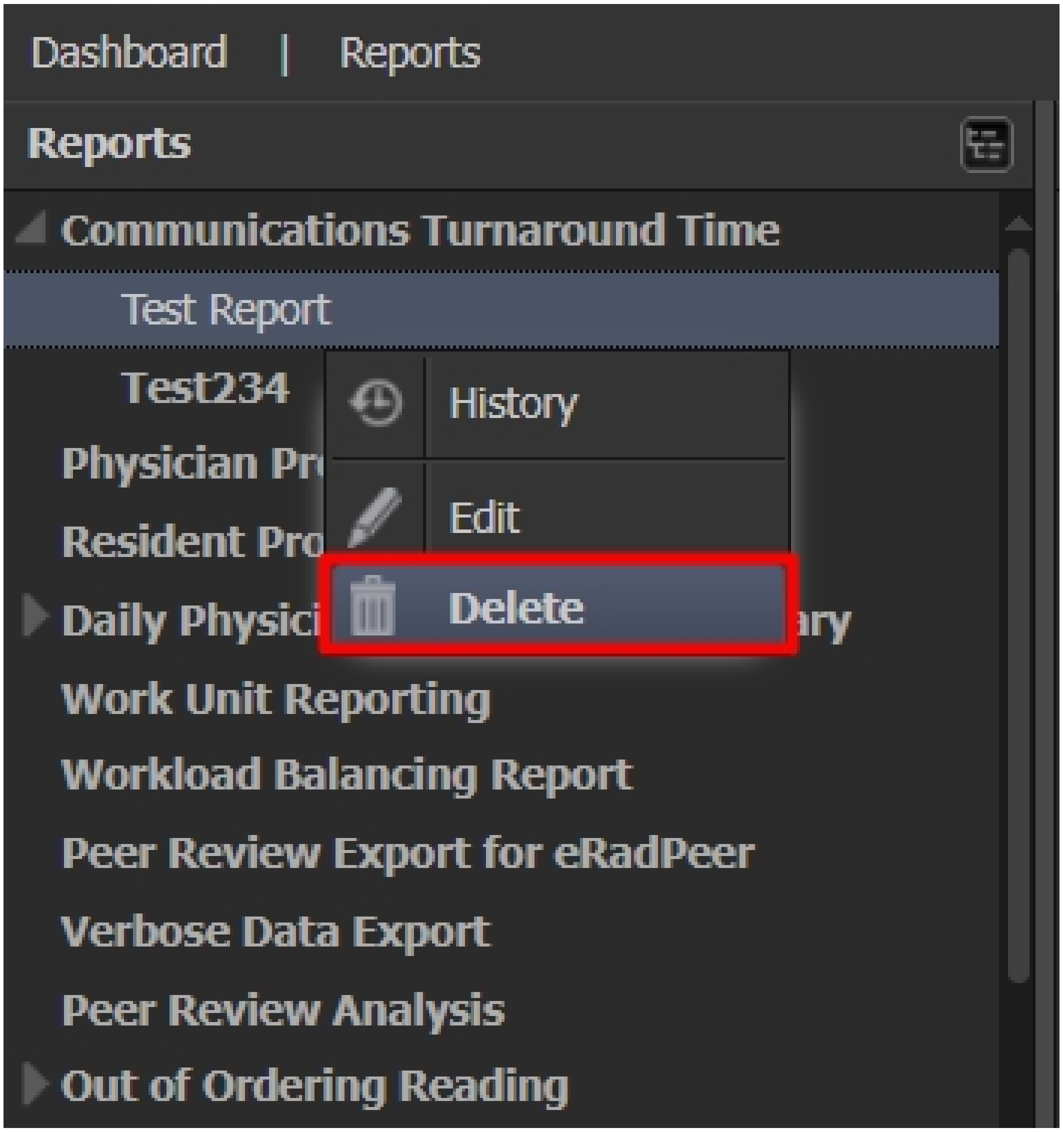
If you no longer need to send out a report, you can delete the report schedule from the **Reports** section.

To delete the scheduled report:

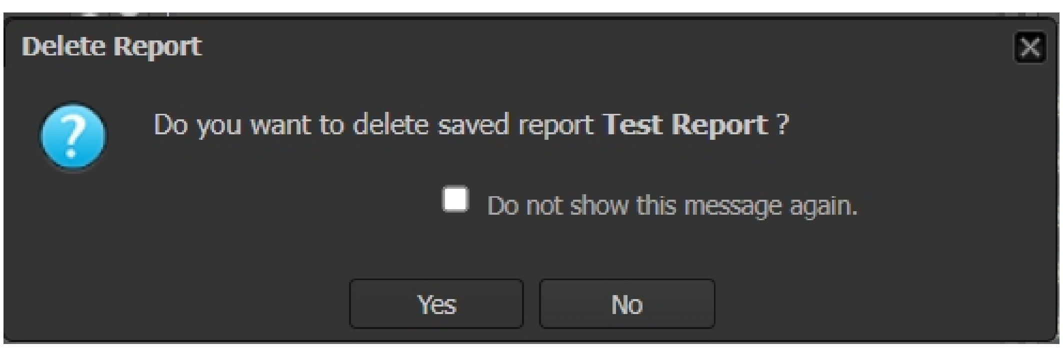
1. In the reports section, expand the report which was saved earlier.



2. Right click the scheduled report.
3. Click **Delete**.



4. In the pop-up dialog, select **Yes** to confirm the deletion or select **No** if you want to keep the report.



Creating a Custom Report

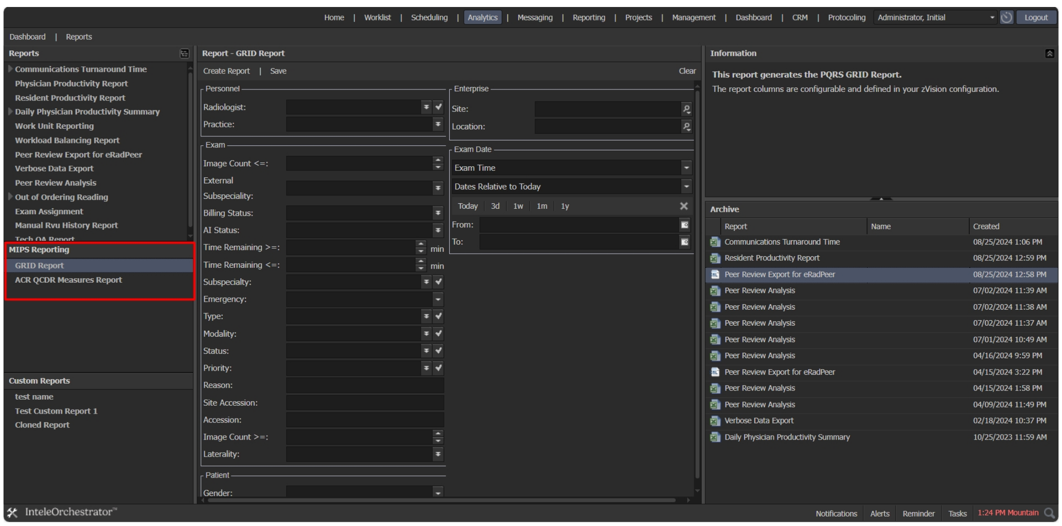
Contact your Customer Success Manager for more information.

MIPS Reporting

Merit-based Incentive Payment System (MIPS) reporting involves submitting data on various measures related to patient care, health information technology, practice improvement, and cost with the goal of encouraging high-quality care, interoperability, and overall improvement in healthcare delivery.

The following reports are available:

Reports	Description
ACR Grid Report	Generates the PQRS Grid Report for MIPS Reporting.
ACR QCDR Measures Report	Generates the ACR QCDR Measures Report for MIPS Reporting.



11

MY SUPPORT QUEUE

My Support Queue is a worklist designed to handle radiologist issues which helps to improve the radiologist productivity. The My Support Queue contains exams with communication Notes assigned to the operations staff. If you are using shift-based worklists, the My Support Queue will be created for you when you log in.

In this chapter:

About My Support Queue

My Support Queue is a worklist designed to handle radiologist issues which helps to improve the radiologist productivity. The My Support Queue contains exams with communication Notes assigned to the operations staff. If you are using shift-based worklists, the My Support Queue will be created for you when you log in.

Some typical communication Notes that you may receive from a radiologist are:

- Prior exams missing
- Needing additional information
- Critical findings
- Contacting the referring physician for more information or follow-up needed

All of these notes are customizable.

All of the worklists contained within My Support Queue are based on communications Notes and not exams. This means that any exams included in the My Support Queue worklists would have to include a communications Note, while the radiologist's My Reading Queue would be exam based and only include exams with no communications Notes or exams with completed communications Notes.

Understanding the My Support Queue Interface

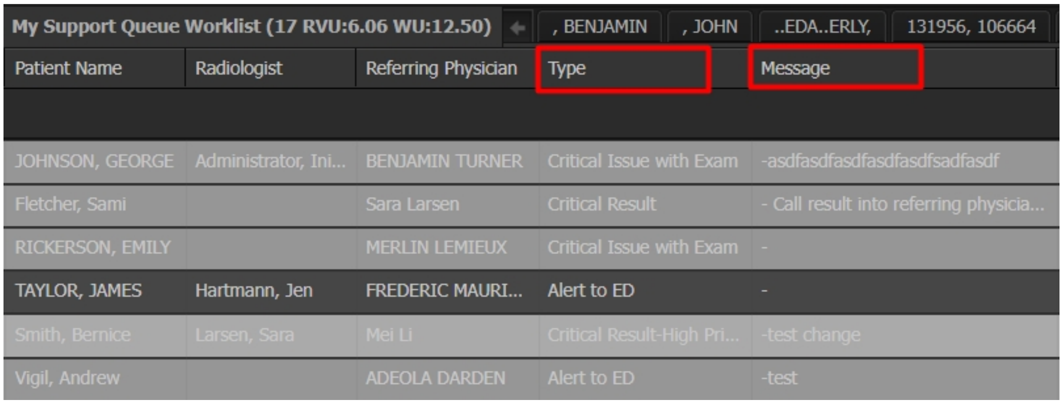
To open the My Support Queue:

1. Log into the InteleOrchestrator. For more information, see Logging in to InteleOrchestrator.
2. InteleOrchestrator allows for several different configurations, which may affect the screen that is displayed upon your initial login. If this is the case, from the Home Page, click **Worklist**.

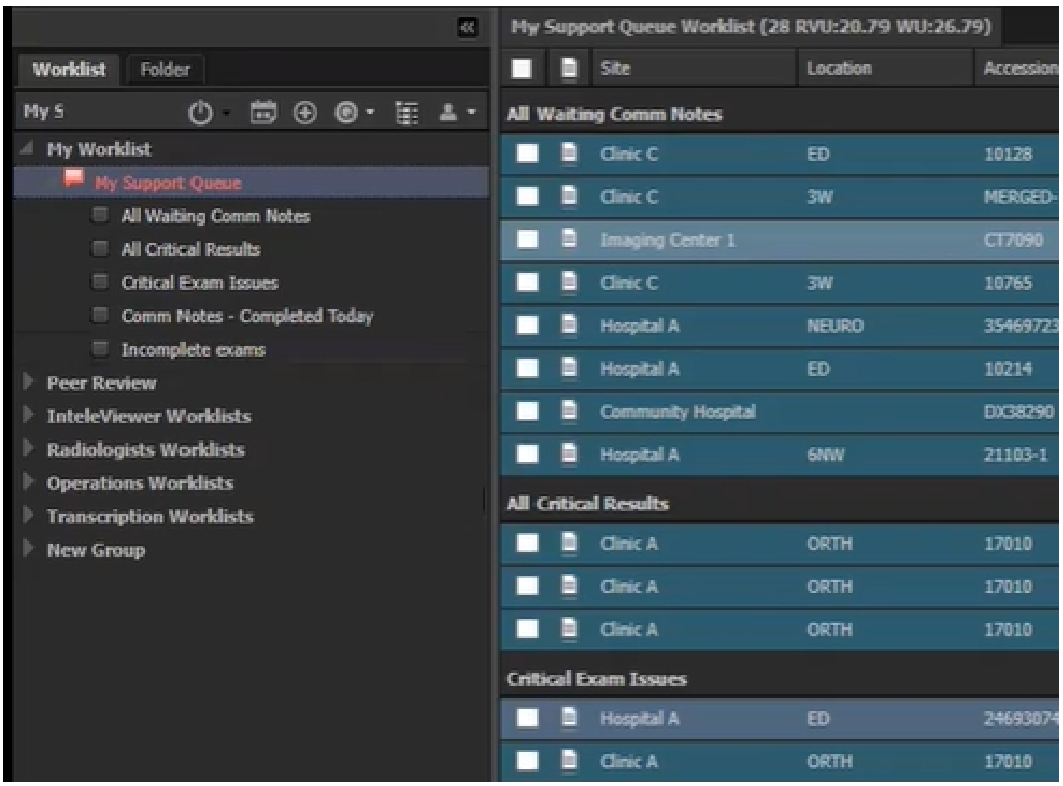
3. Set your shift or set your working hours, click **Save**.
4. The InteleOrchestrator interface displays the My Support Queue.

Some columns that provide information about the communication notes are:

- The **Type** column displays the type of communication Note attached to the exam.
- The **Message** column displays the message that is included in the communication Note.

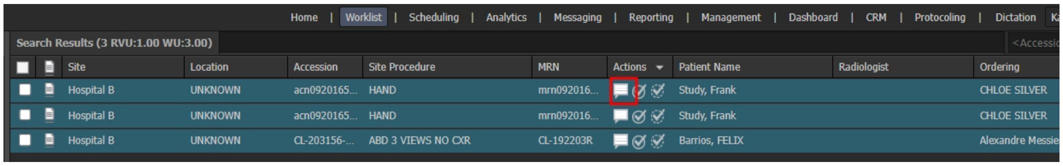


Expand **My Worklist** to locate **My Support Queue** in the worklist panel. You can expand My Support Queue to further see how My Support Queue is broken out into different worklists.

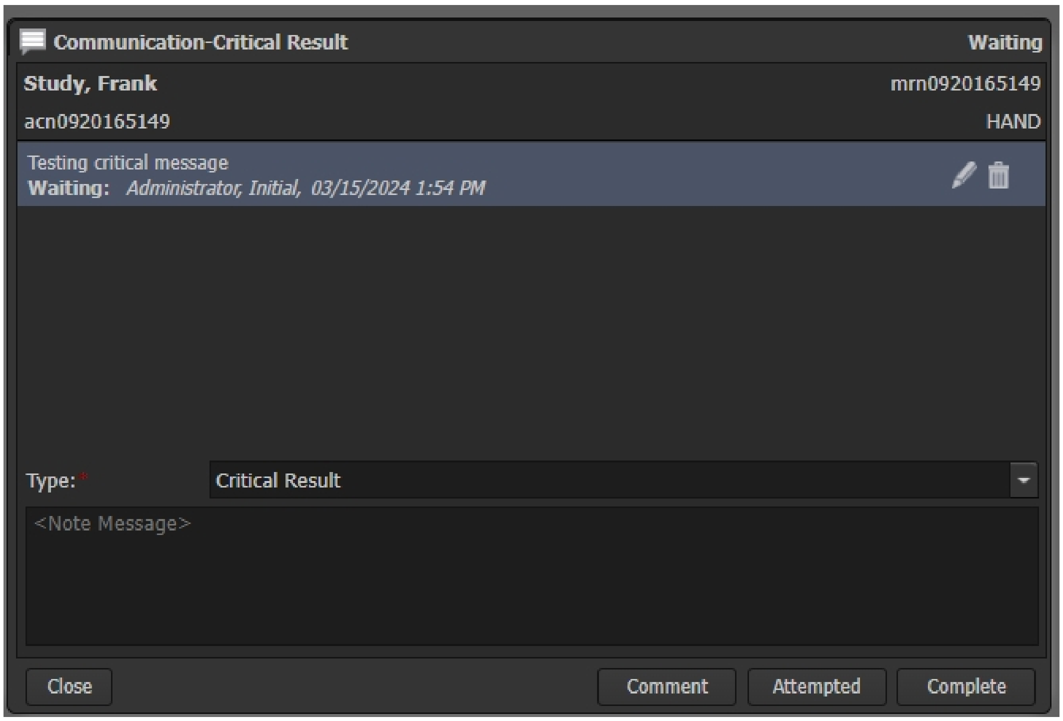


To open the communication Notes directly from the My Support Queue worklist:

1. Click the Open Notes icon.



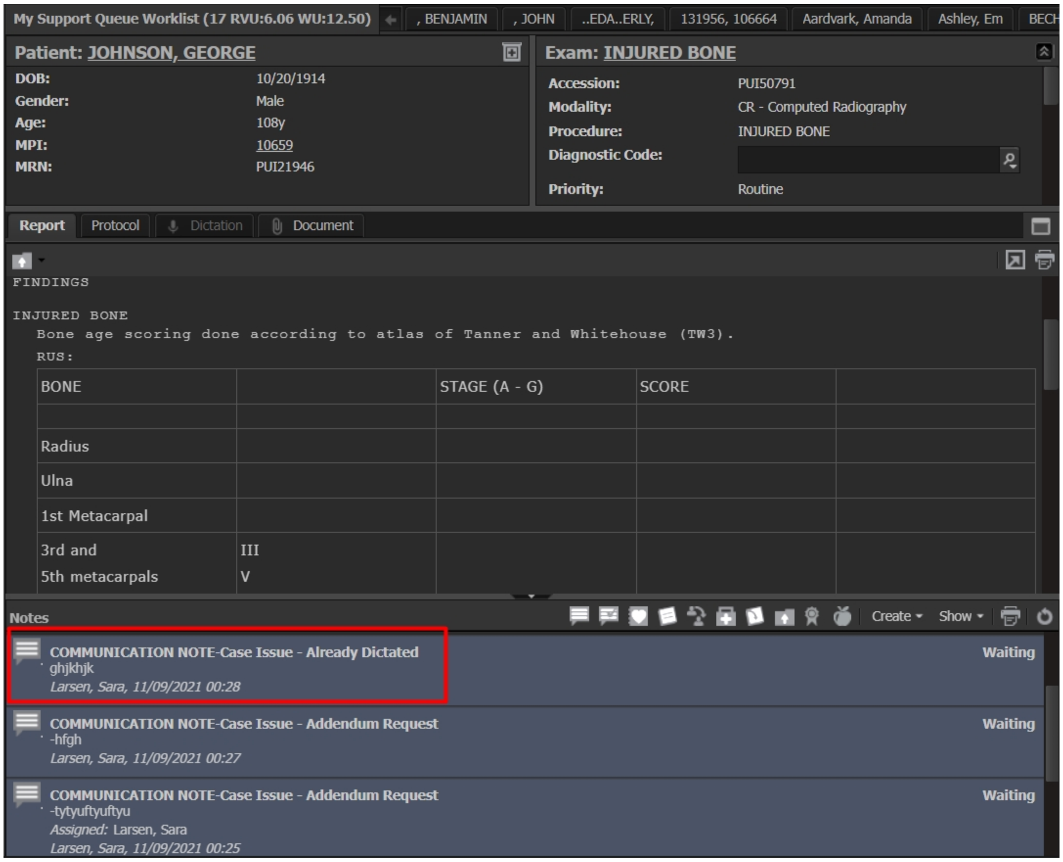
2. The communication Note is displayed.



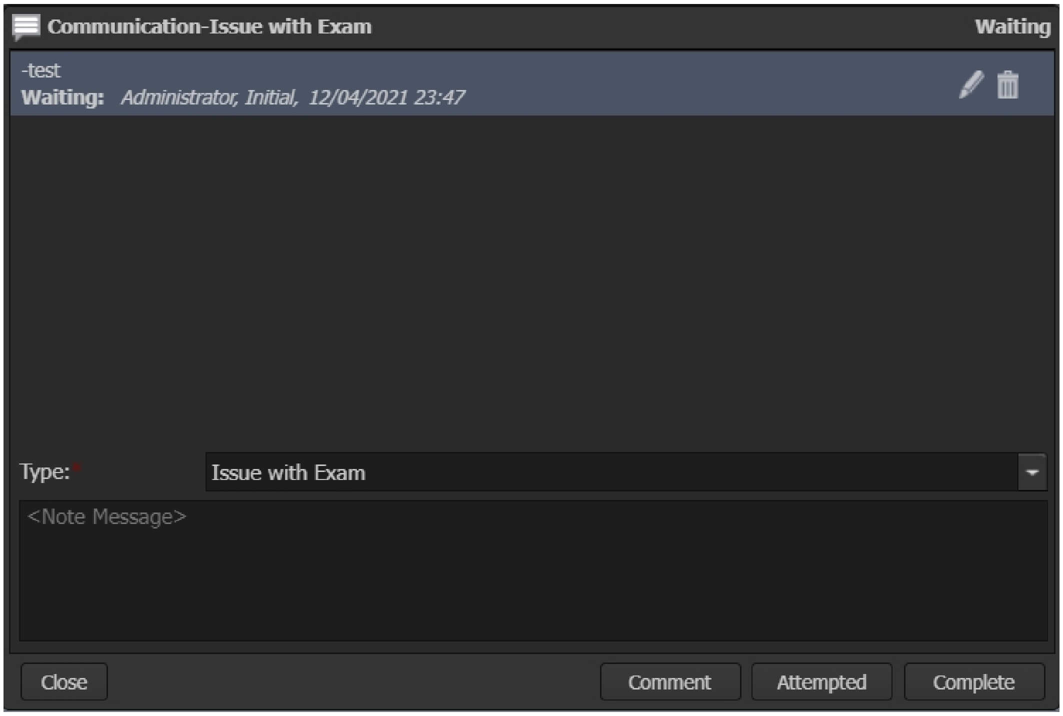
To open a communication Note from Patient View:

1. Click on an exam in the worklist.

2. Click on the communication note in the notes section of the patient view.

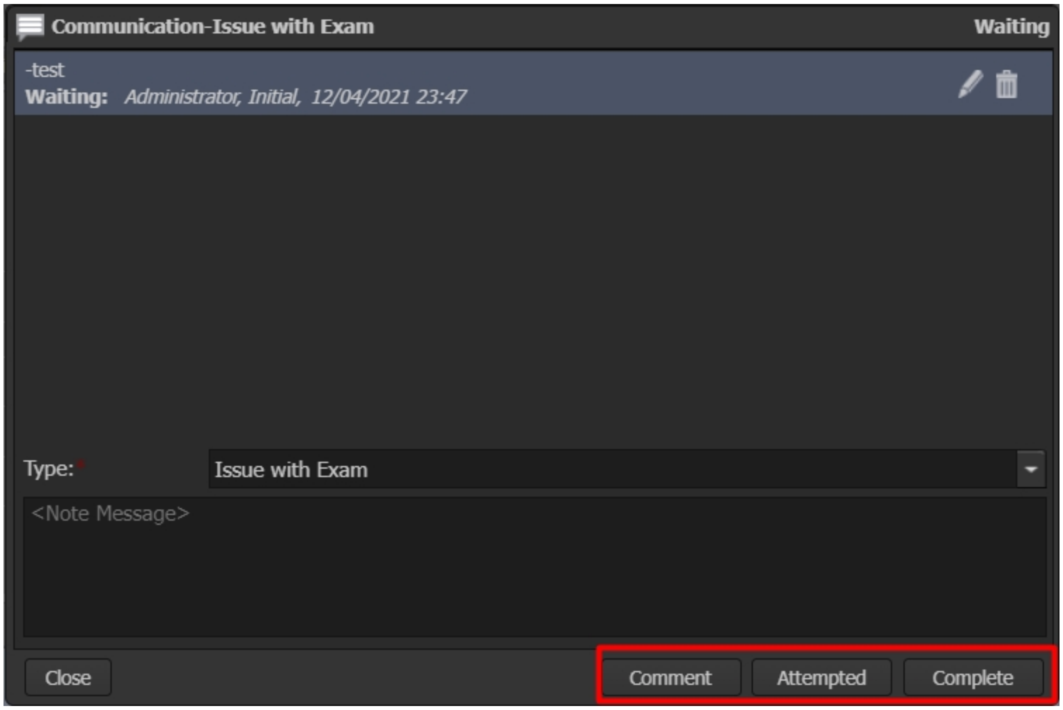


3. The communication Note is displayed.

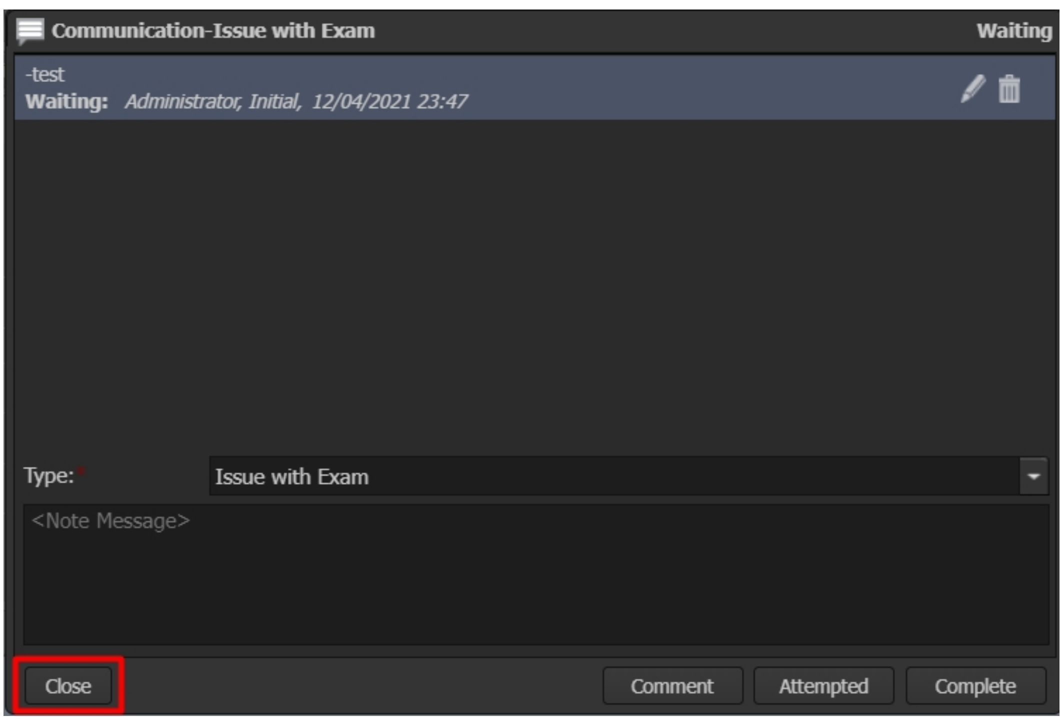


To work with a communication Note:

1. With the communication Note opened you have the following options:
   a. Comment - you can let the radiologist know that you are working on this communication Note and have acknowledged it. When you add a comment, this Note will remain in your My Support Queue worklist because it is not completed.
   b. Attempted - you attempted to find or perform the task requested by the radiologist, but were not able to. When you set the Note to Attempted, this communication Note will remain in your My Support Queue worklist because it is not completed.
   c. Complete - you have now completed the work.



2. You do have an option to type a message back to the radiologist.
3. With each step (comment, attempted, and complete) you can click close to close the note until you have done more work on this Note.



4. Once you set the communication Note to Complete, the communication Note will no longer display as part of your My Support Queue and the exam will automatically display back on the radiologist's worklist.

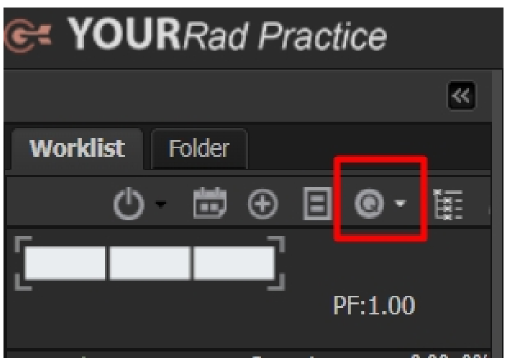
Creating and Editing My Support Queue

If you are using shift-based worklists, the My Support Queue will be created for you when you log in. If you are not using shift-based worklists and have not had a My Support Queue created for you, you can create a My Support Queue for yourself.

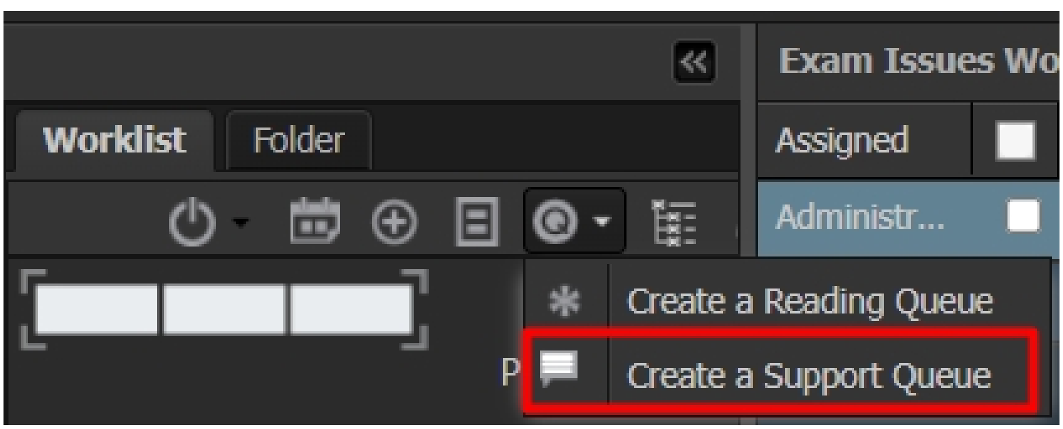
The My Support Queue is also customizable if you have the permissions to do so.

To edit or create a new My Support Queue:

1. Click the Q icon in the top right of the Worklist panel.

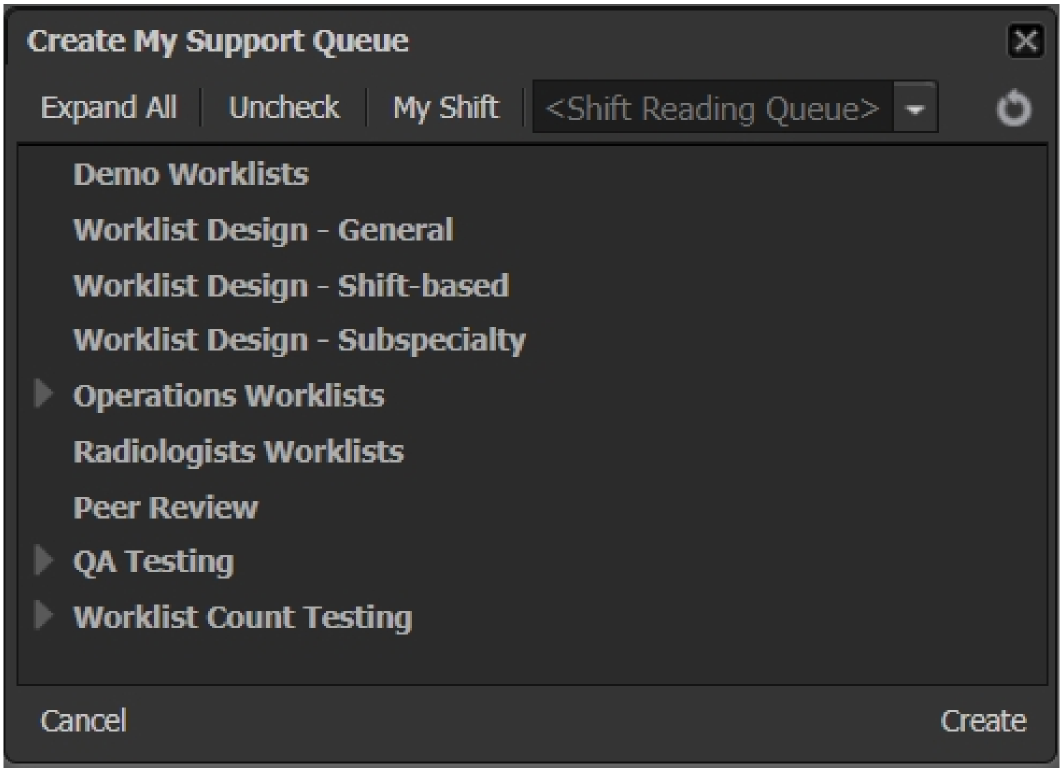


2. Select **Create a Support Queue**.



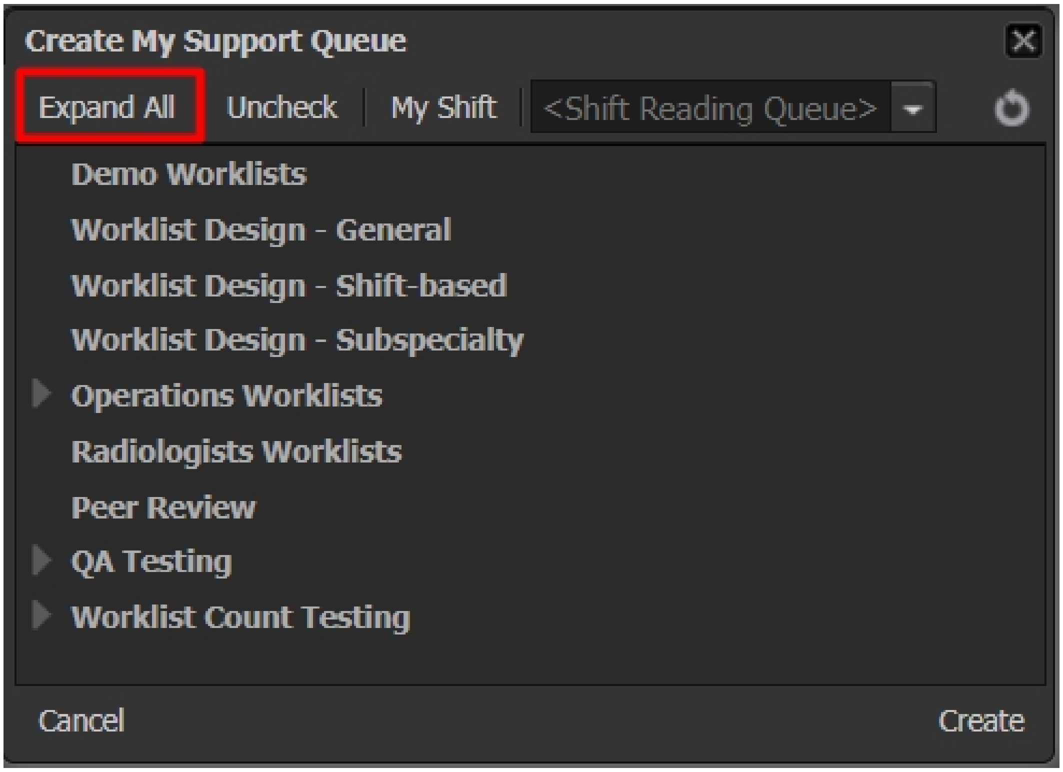
3. Dialog opens where you can create or change your My Support Queue by selecting specific worklists or you can quickly reload your My Support Queue with the default worklists from another shift.

   Only communication note worklists can be included in My Support Queue.

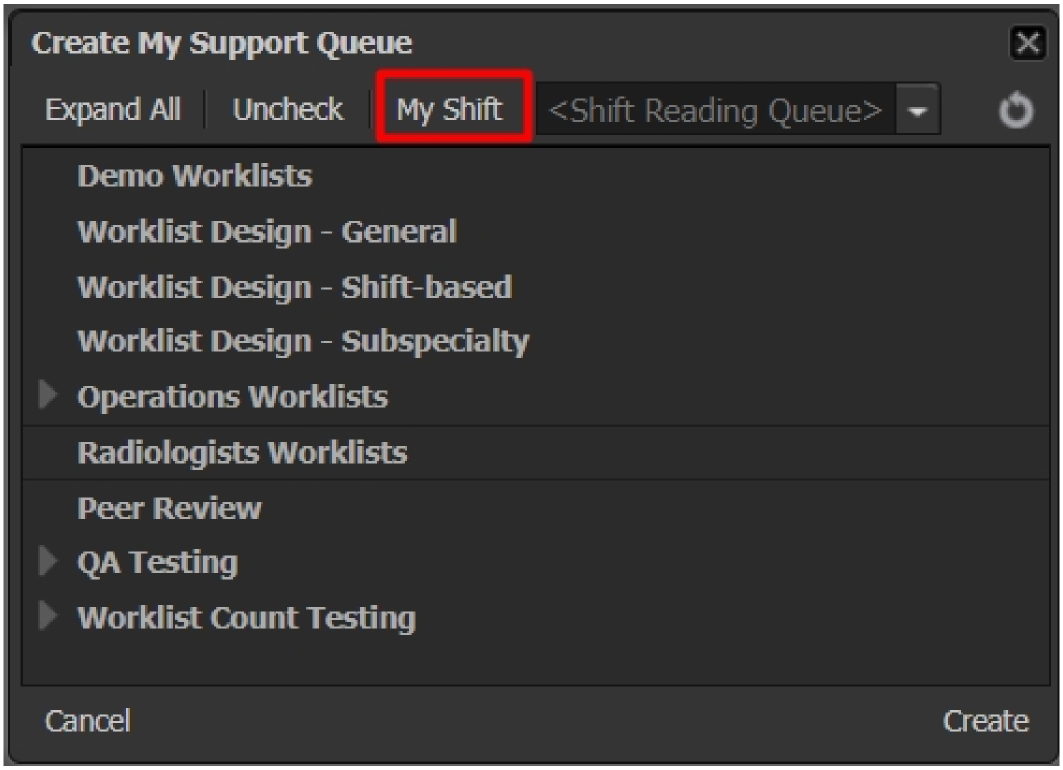


4. You can do the following:

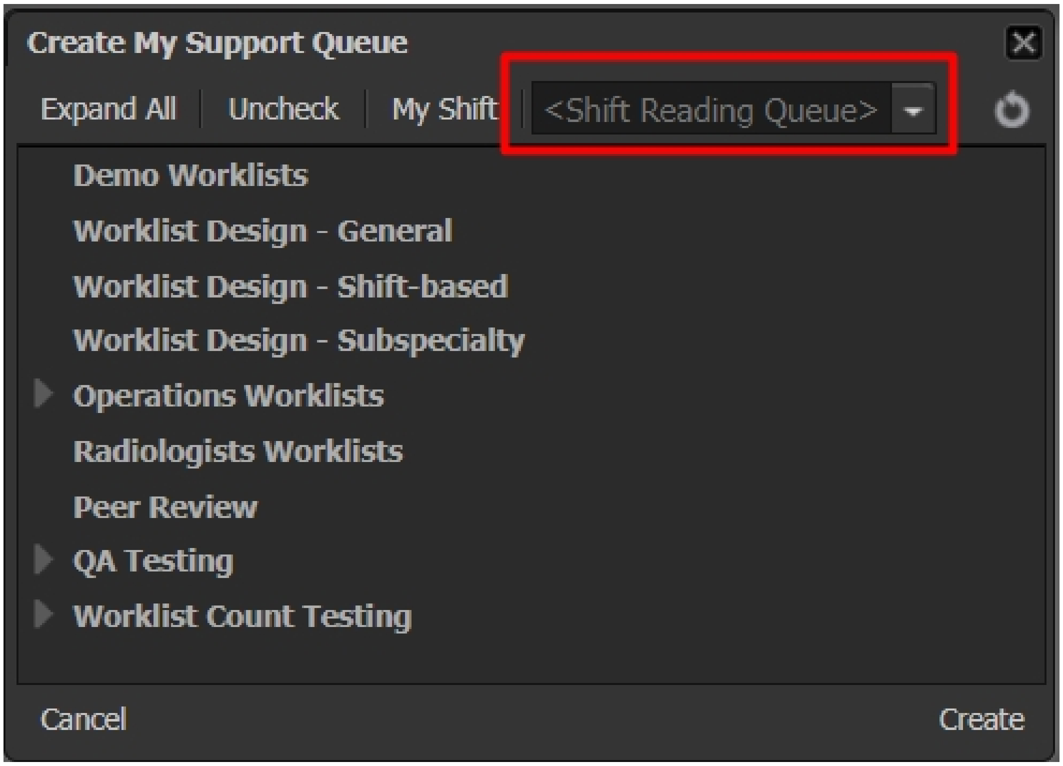
   - Expand the worklist groupings or click **Expand All** to view all worklists and individually add or change your My Support Queue.



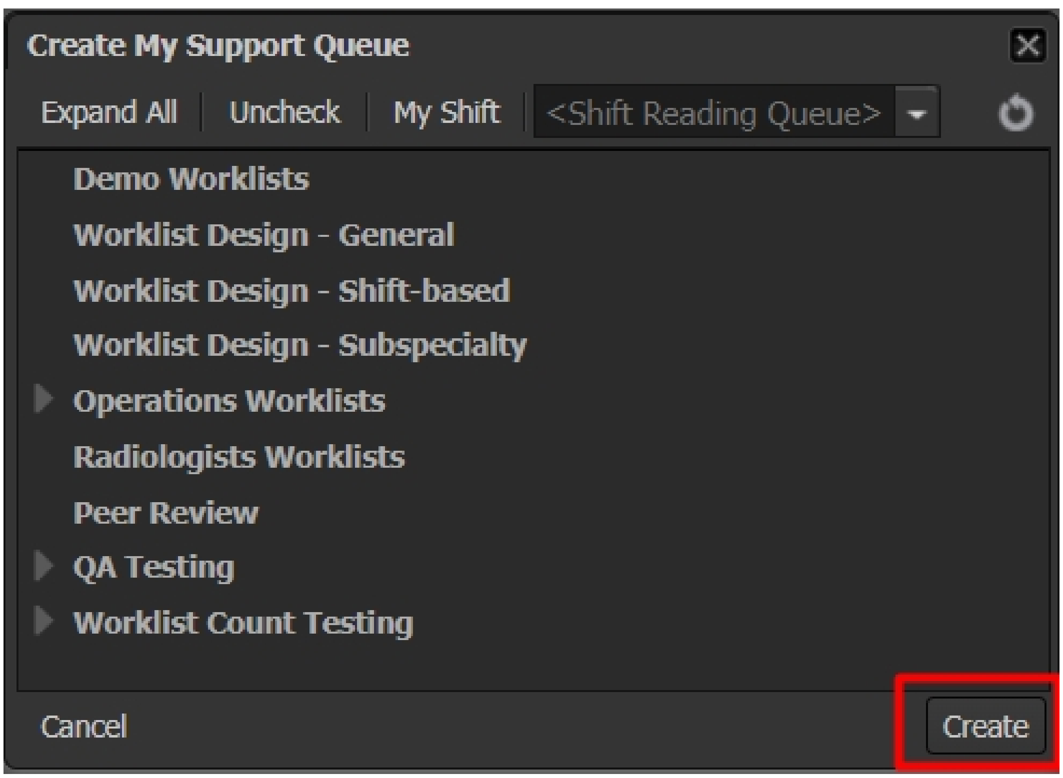
- Select **My Shift** to reload the default worklists associated with your current shift.



- Select another shift from the **Shift Reading Queue** drop-down to load the default worklists associated with a different shift.



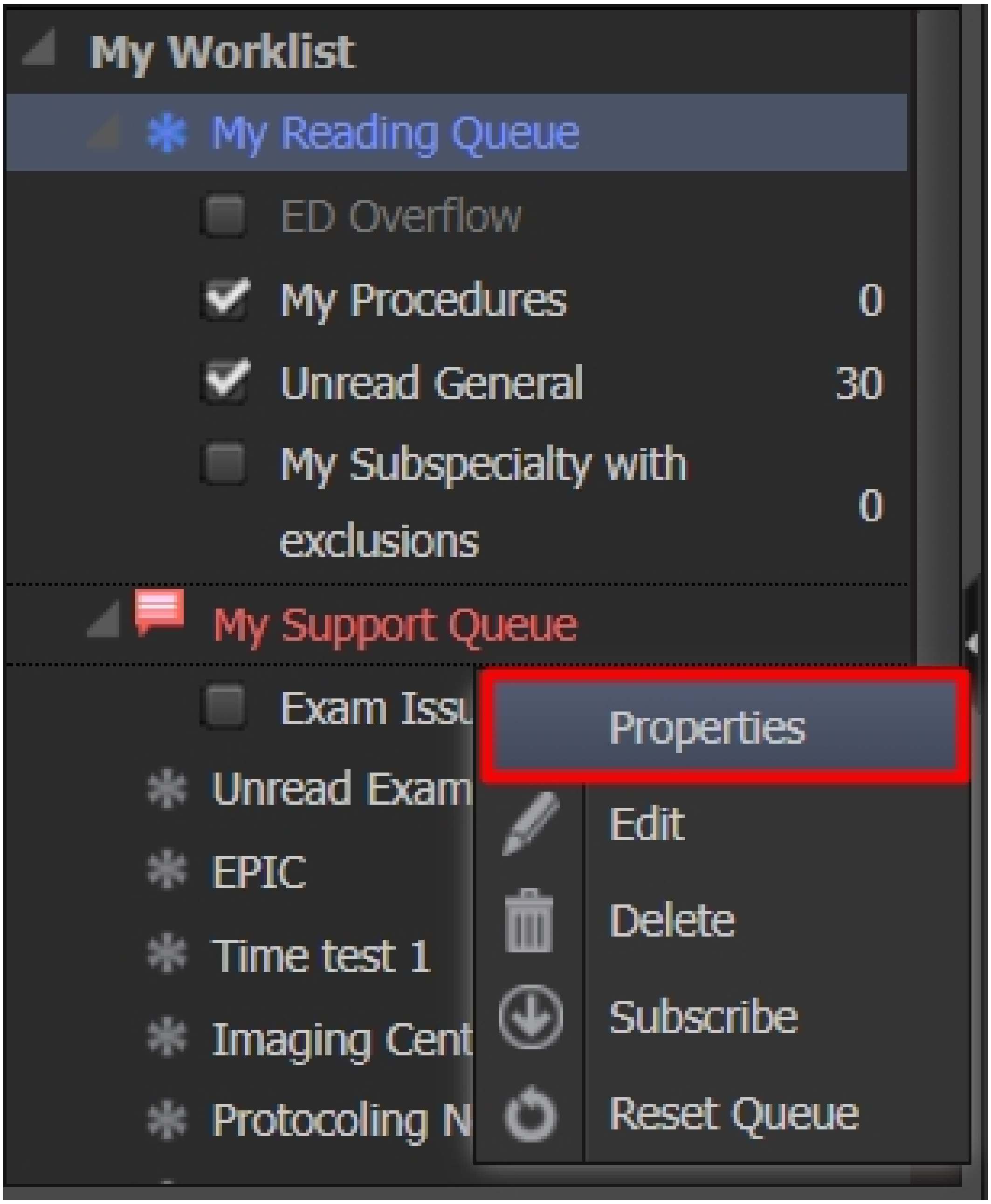
5. Click Create.



6. Worklists will be added to the My Support Queue section.

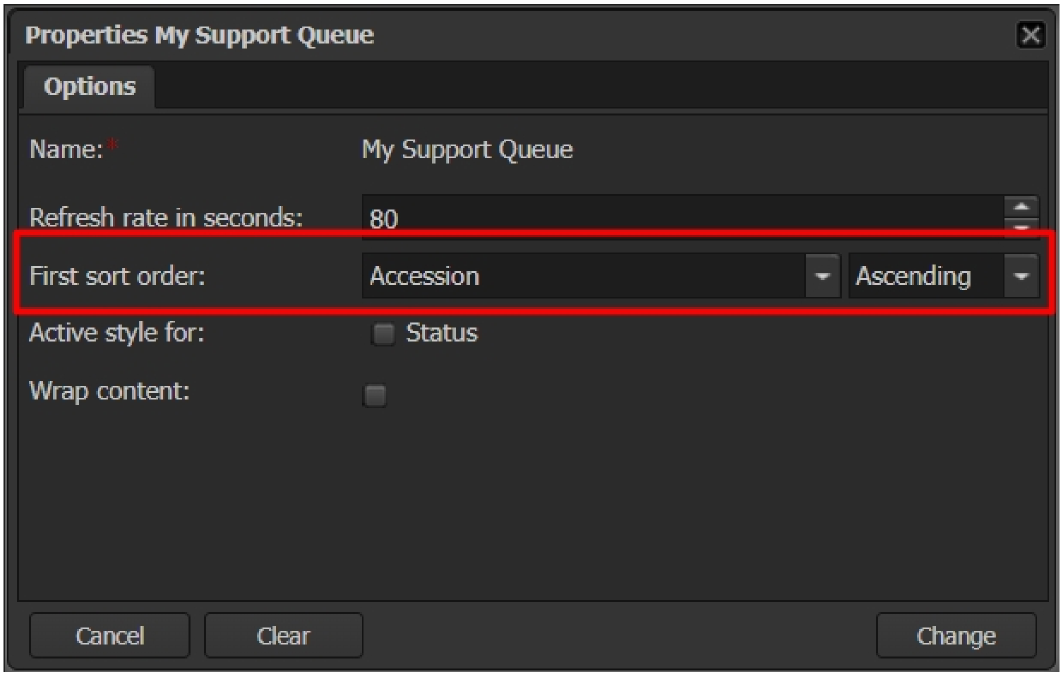
Changing the Properties of My Support Queue

1. Right click on **My Support Queue**.
2. Select **Properties**.

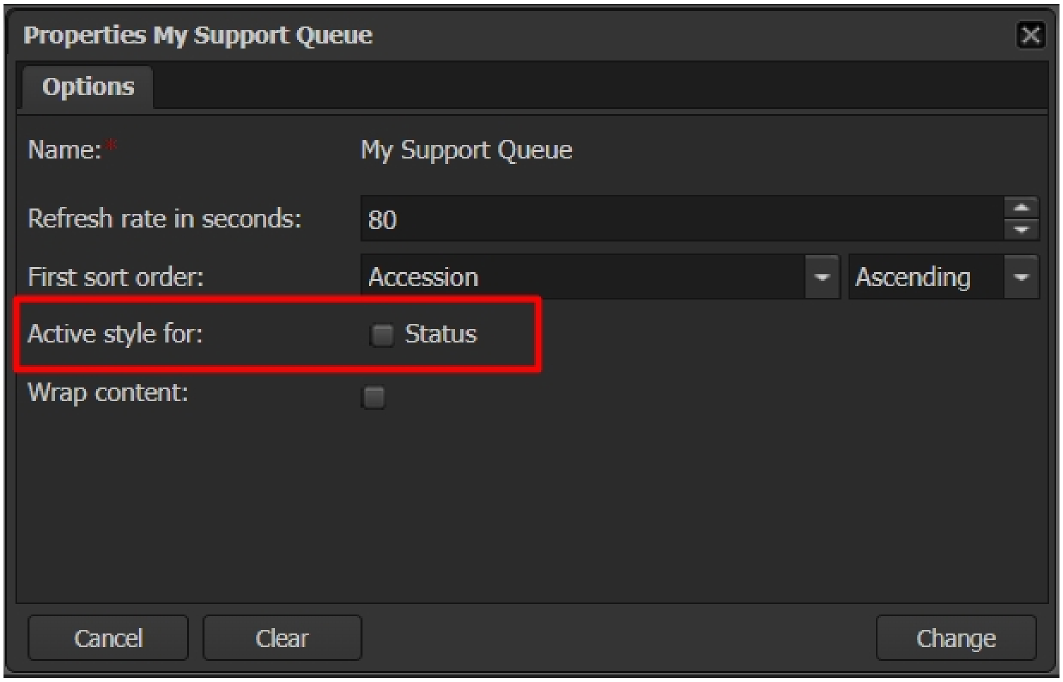


3. Set the Sort Orders, Active Style and optionally you can choose to wrap the My Support Queue content:

   a. Sort Order - Sort order is the selection to define how you want the communications notes to be sorted on the worklist. For example, if it is set to **Accession**, the worklist would be sorted by number order of accession.



   b. Active style -Active style defines the colors used on the worklist. When **Status** is checked, different communication note statuses are displayed in various colors. If **Status** is not checked, the different communication note statuses are displayed in white.



4. Click **Change**.