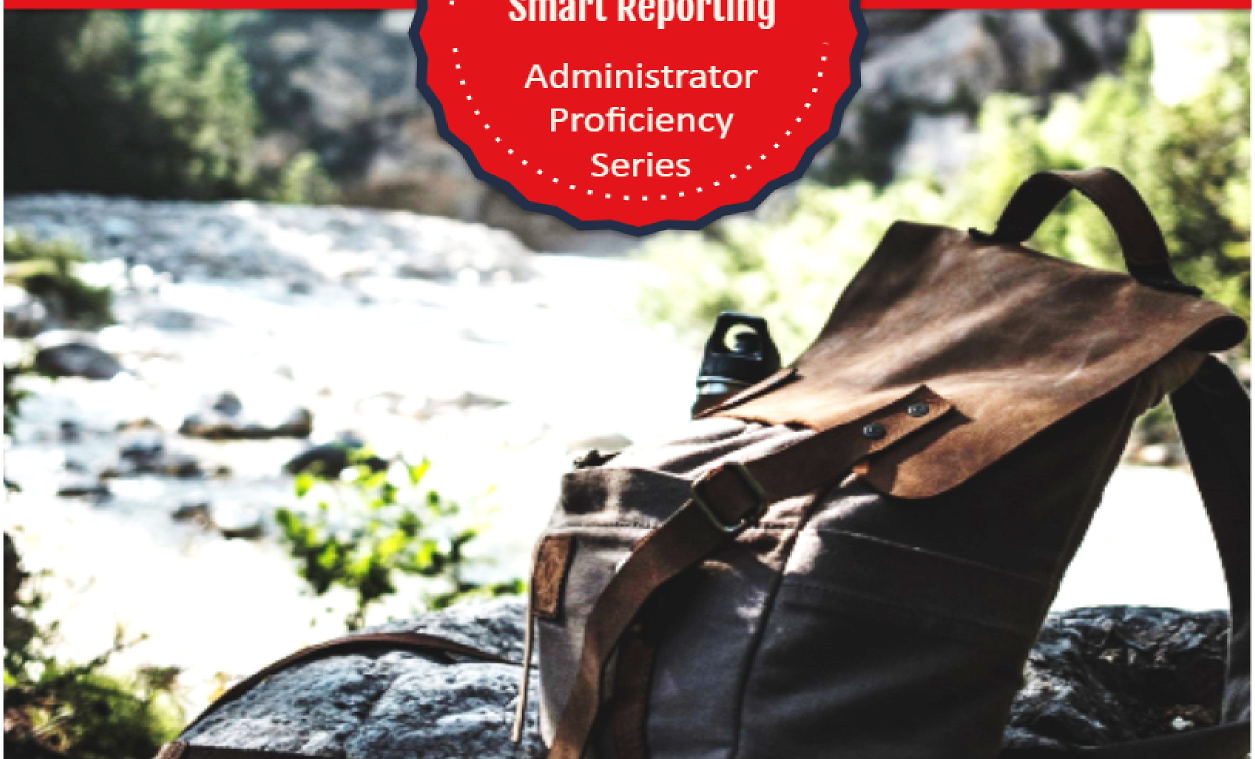
Clario
Smart Worklist &
Smart Reporting

Administrator
Proficiency
Series



Clario Smart Worklist & Smart Reporting

Training Packet for PACS Admins

CLARIO SmartWorklist™

This packet will provide clients a guide to supporting Clario SmartWorklist.
All patient data shown in this packet is fake patient data within our demo system. This document does not contain any PHI.

Table of Contents

Access

The first step as a PACs Administrator is accessing the system. In this section we will cover the different options available for setting up Access to the Clario Smartworklist.

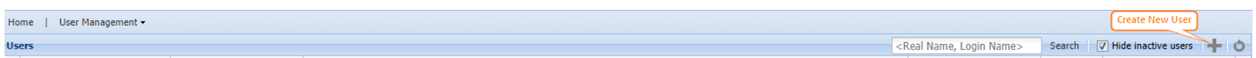
Local User Access

Local users are configured in User Management. Navigate from the Home Screen to the Management Module and select User Management.

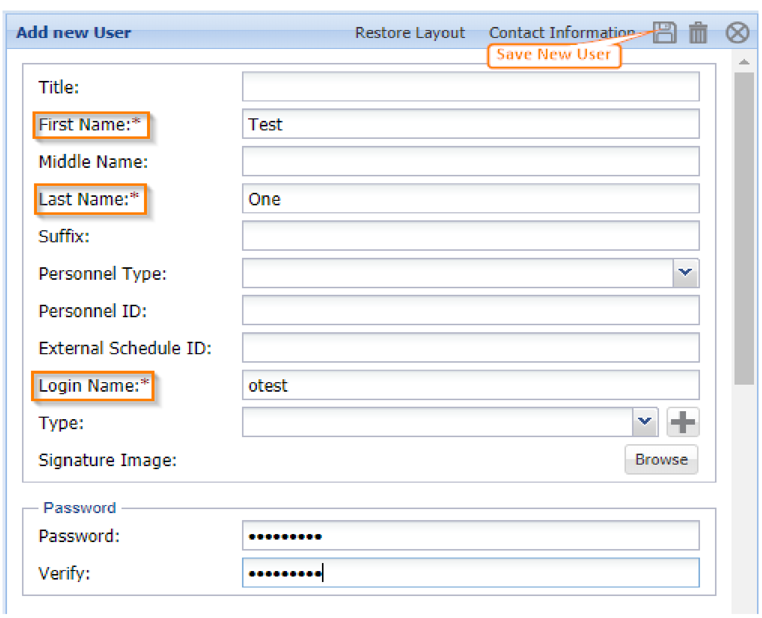
Creating New Users

Within User Management the following steps detail how to add a new local user:

As seen in Figure 1, to create a new user, simply select the "+" icon at the top of the screen. To the right a blank template will appear to fill out.

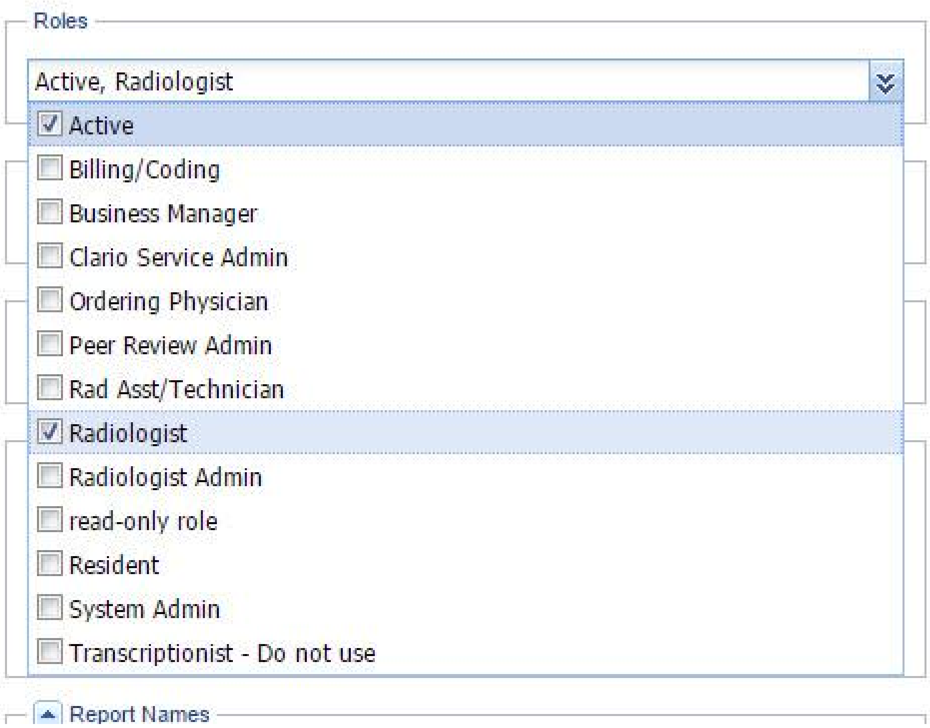


In Figure 2, many of the areas have already been filled out. Take note that all areas with a red asterisk are mandatory fields when initially creating a user. In addition, create a temporary password. The fields outlined with an orange box in Figure 2 indicate the asterisked fields. When done creating a user, simply select the disk (save) icon in the upper right portion of the screen.



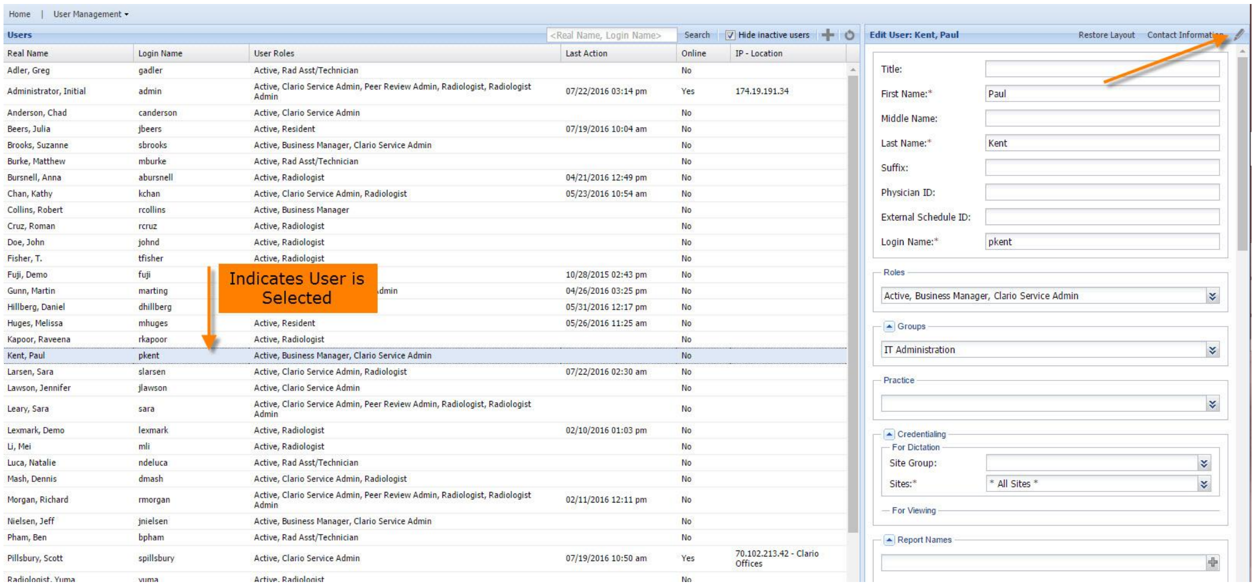
Making a user "Active"

It is also important, when creating a new user, to make the user "active" in the system. If a user is not made active in the system, he or she will be unable to log in to Clario. Making a user "active" is managed in the "roles" section of the create and edit new user template. Assign the user an "active" role as well as any other User Roles pertaining to the user. See Figure 3.



Editing Users in User Management

Editing a user in Clario is done so in the User Management section of Clario. Select the user from the User List on the left hand side of the screen by clicking on the user. The user will then indicate a "highlighted" bar across the name indicating the user is selected. See Figure 1. When ready to edit the selected user, simply select the pencil icon in the upper right portion of the screen (as seen in Figure 1.).



Once the pencil icon is selected, the "Edit" user template will allow the user to manipulate and make changes to the selected user. If the pencil is not selected, the user will be unable to edit any fields or information. Once done editing the user, simply select the "save" icon in the upper right portion of the screen. (See Figure 2).

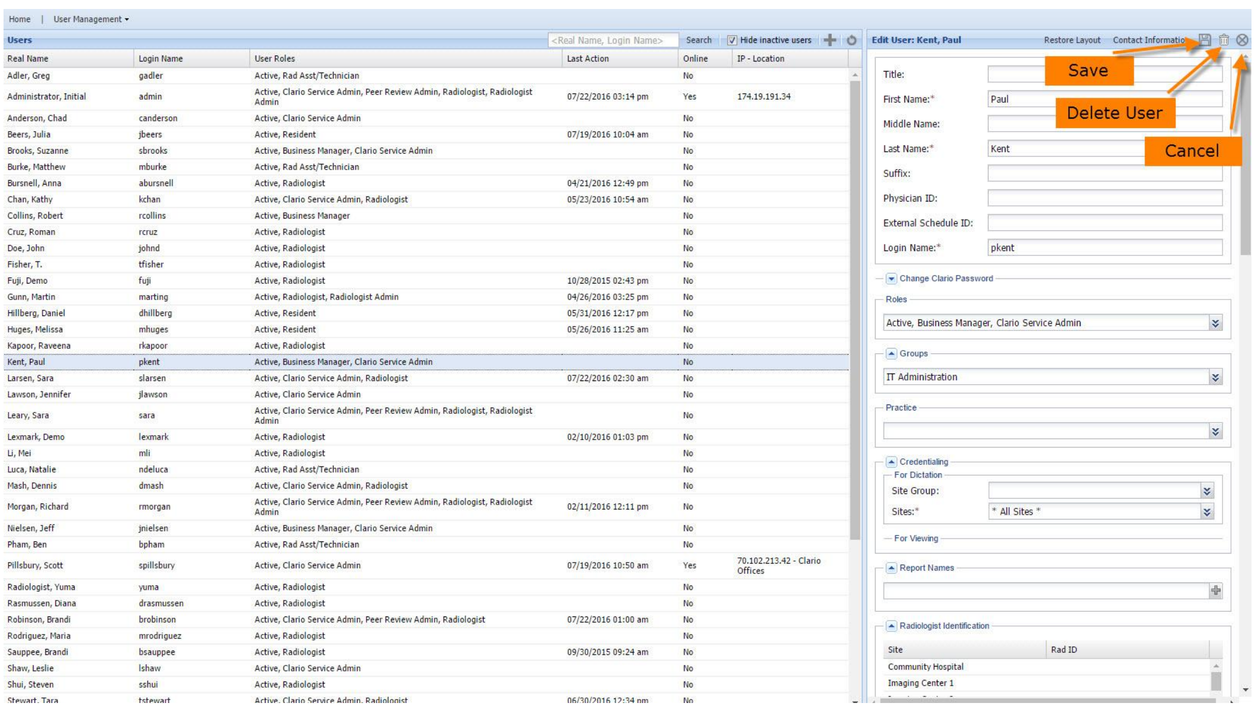
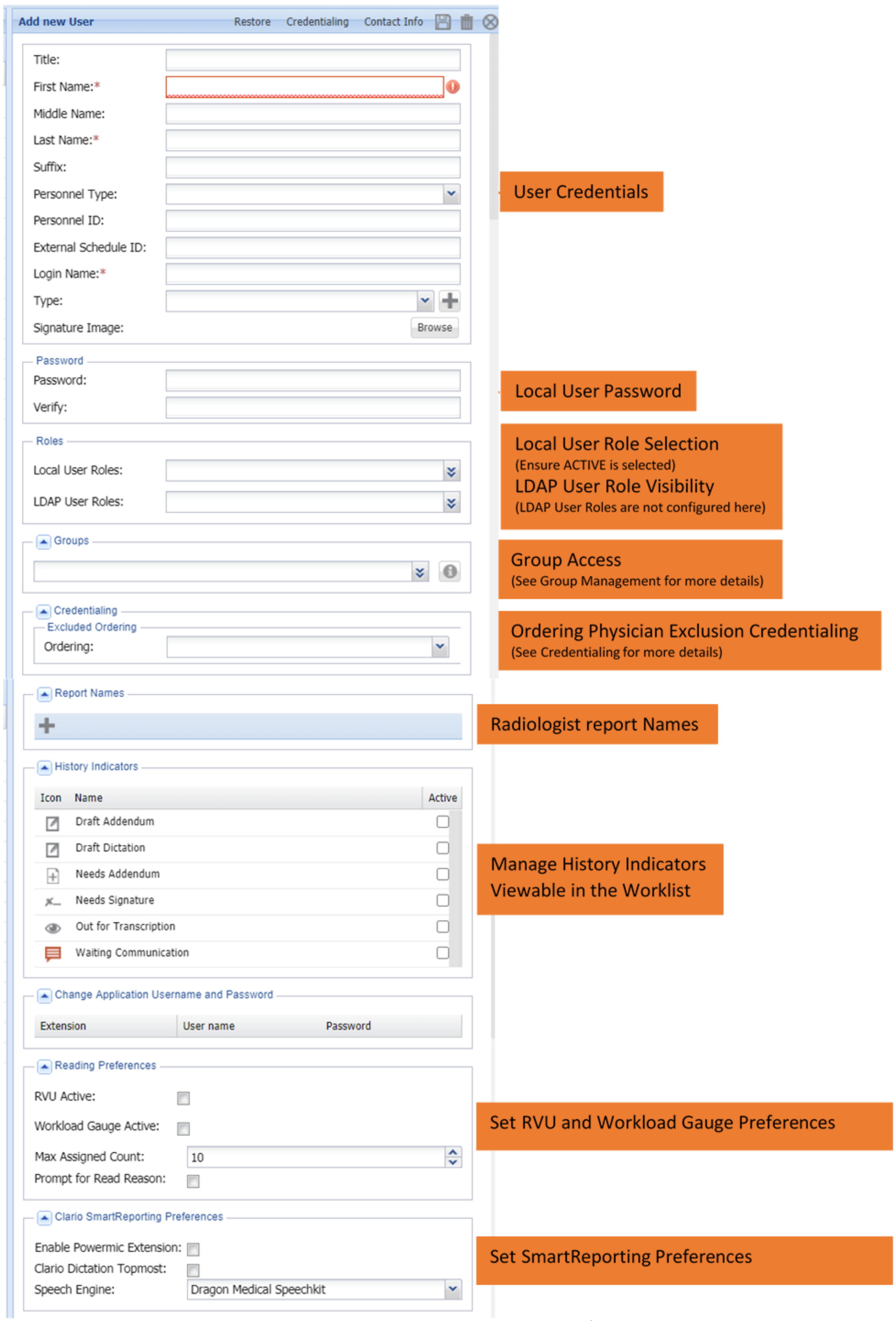
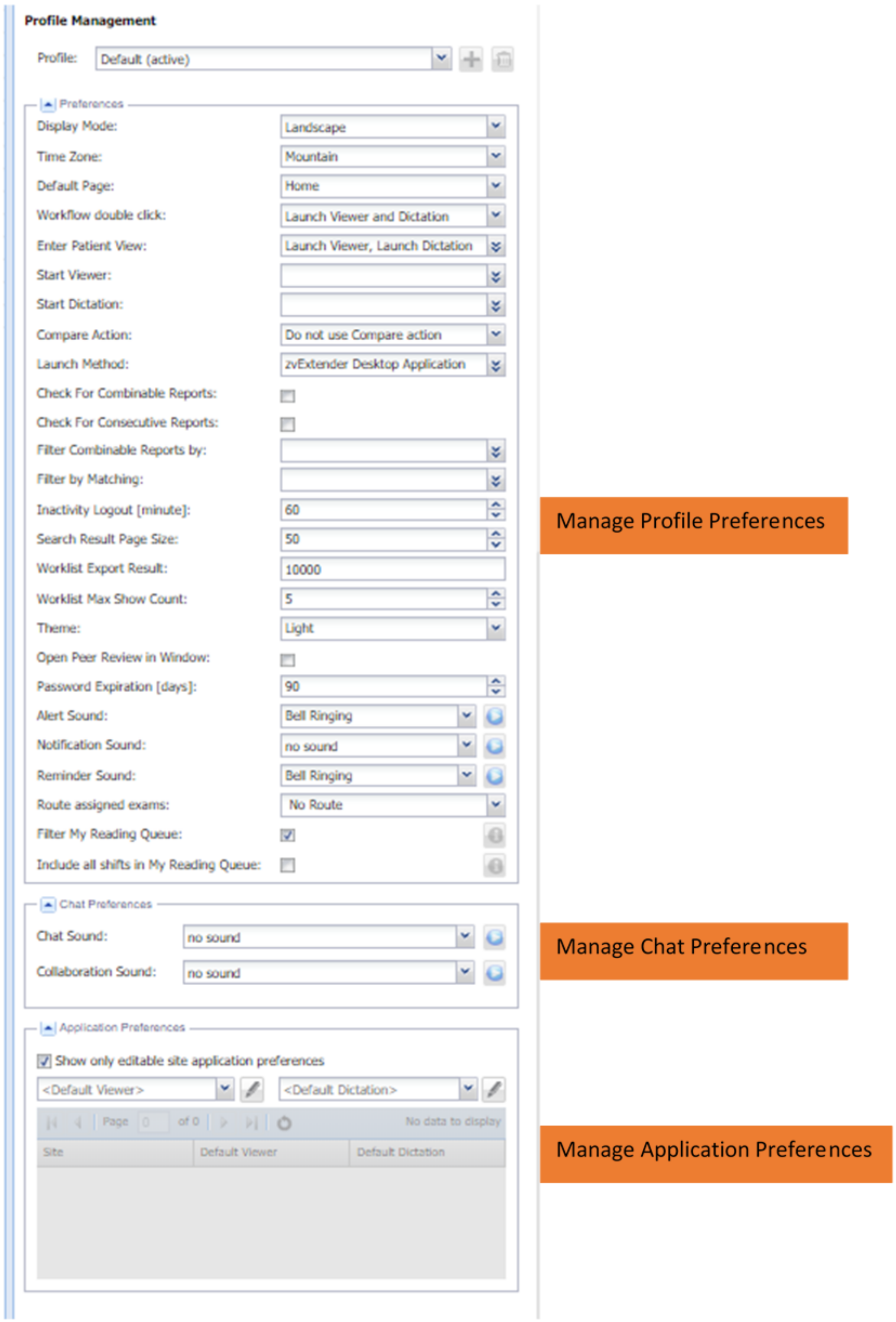


Fig. 2 Save, Delete and Cancel functionality in User Management.

Overview of User Management Page

Now that you know how to add a new local user to Clario SmartWorklist, it is important to understand all of the fields on the User Management page.





User Credentials

Entering in the User Credentials is the first step in creating a user in Clario. Fields indicated with a red asterisk are mandatory. First Name, Last Name and Login Name are all mandatory fields in this section. A Title and Suffix can be applied to the user as well as a Middle Name entered, but not mandatory.

The user is also able to enter a Personnel ID and External Schedule ID.

Personnel ID is populated if the customer chooses to send the Personnel ID through the ORU message. In doing so, this will match the Personnel ID to the signed report in Clario populating the signed report appropriately. If the Personnel ID field is populated the Report Name field will NOT need to be filled out.

External Schedule ID is utilized when a customer integrates with a Scheduling Application such as qGenda.

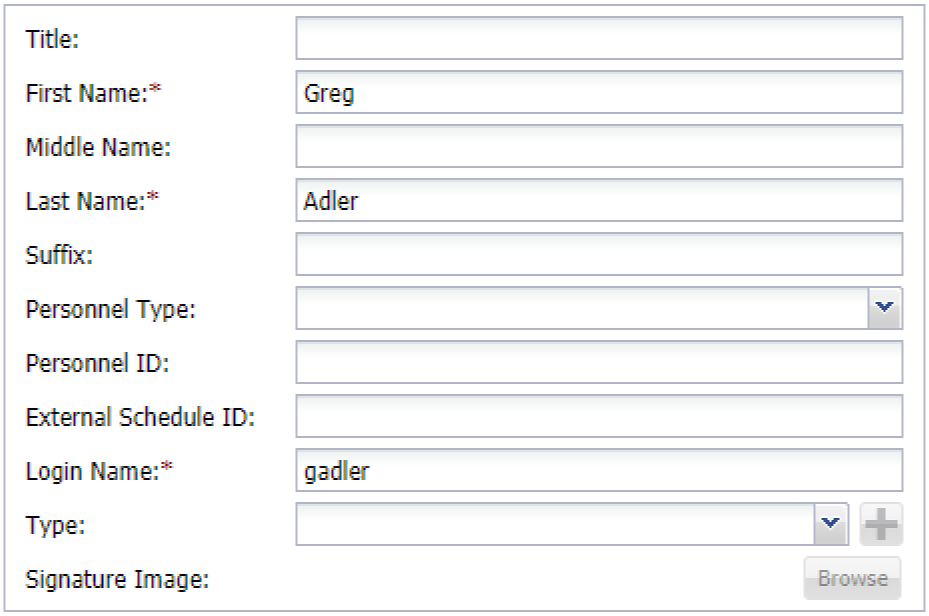


Fig. 1: Clario User Credentials in User Management

Report Names

In User Management, it is very important that the Report Name is identified if the Physician ID is not captured through the ORU message. (See Figure 1).

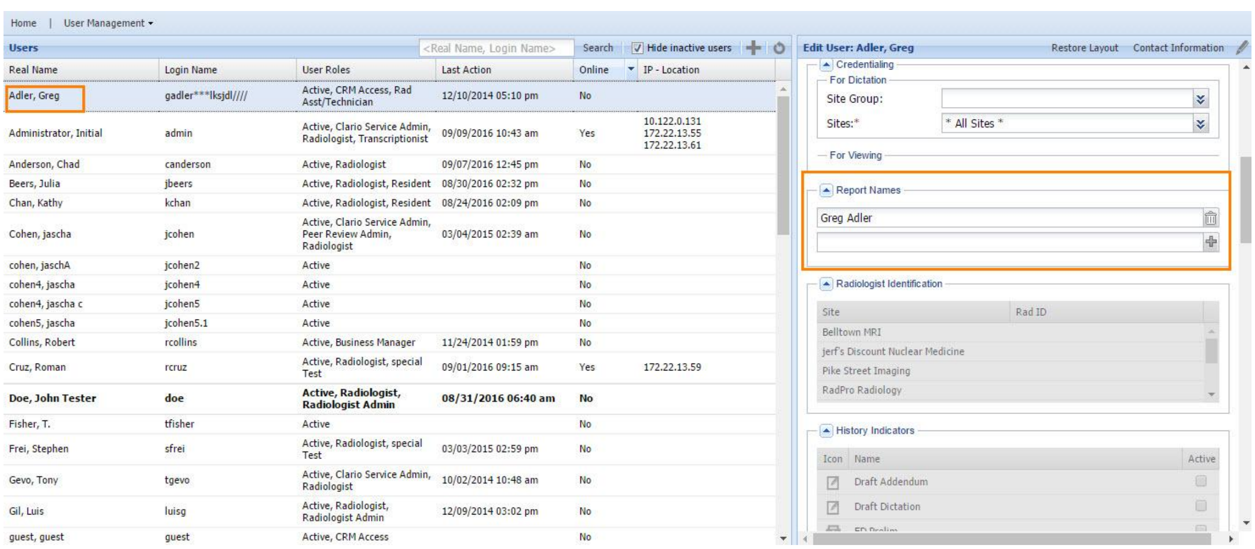


Fig 1: Report Name "Greg Adler" is associated with user Adler, Greg in Clario.

Identifying exactly how the report name will appear in the HL7 message, including case, is imperative for the following reasons:

1) Peer Review: Peer Review will not work appropriately if the Physician ID or Report Name is not identified as the radiologist will appear in Clario as an "Unknown" radiologist (See Figure 2)

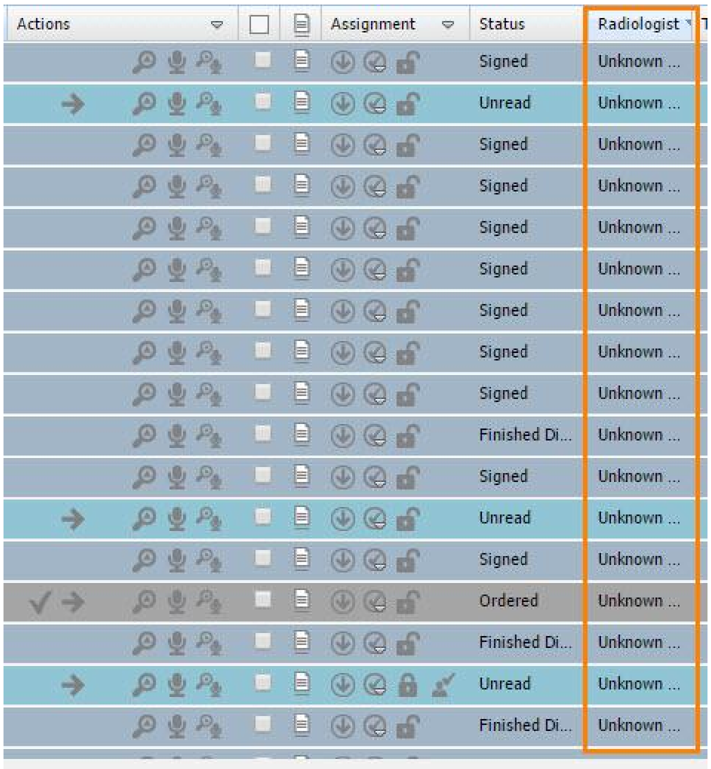


Fig. 2: Unknown Radiologists appearing in the worklist due to Physician ID or Report Name not being mapped correctly.

2) RVU Tracking and RVU Gauge: RVUs will not work without the Physician ID or Report Name identified as the radiologist will not be associated with the RVU.

3) Analytics and Reports: Certain widgets and reports in analytics will not work appropriately without the Physician ID or Report Name identified as the radiologist will not be mapped within Clario and therefore will not be counted in the data.

More than one Report Name can be entered as it is important to identify each and every way the radiologists' names will come across in the HL7 message. By simply selecting the + Icon and entering in the report name more than one report name can be added (See Fig 3.) Remember to select the pencil icon in the upper right corner to open the user for "editing" and select the save icon when finished entering report names. These names are case sensitive and must match exactly what is coming out of the RIS.

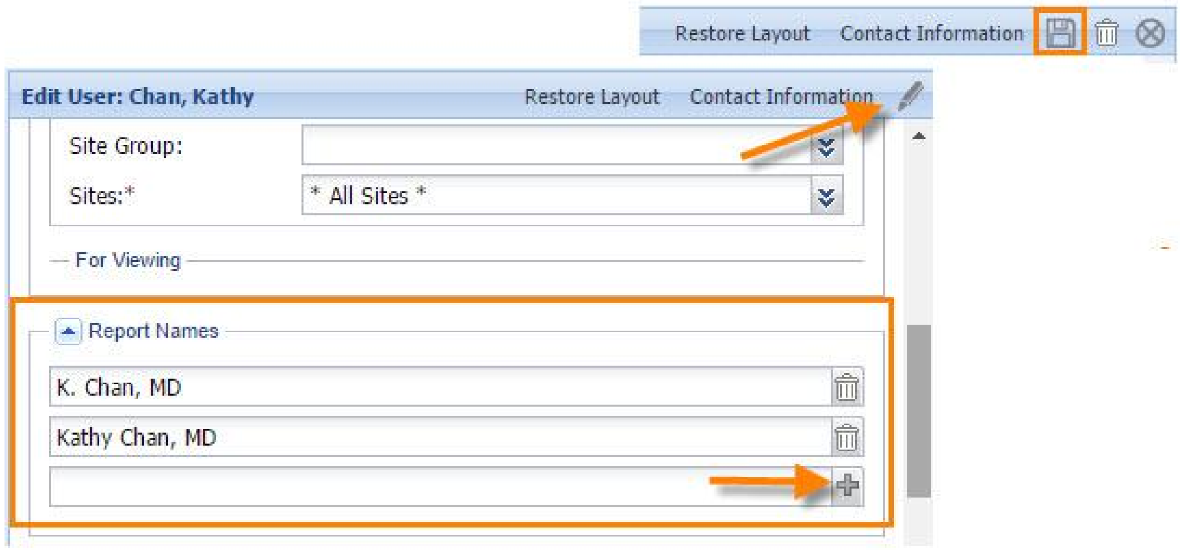


Fig 3: Entering more than one report name in Clario is done so by typing in the report name on the next available line and then selecting the + icon. Once the report names have been successfully entered, ensure to select the save icon in the top right of the screen to save all entered report names.

History Indicators

In the Worklist section of Clario, the History Panel shows all of the exams the user has dictated or changed for the specified date range. The user is able to view the status of exam tasks using the History Indicators (See Figure 1).

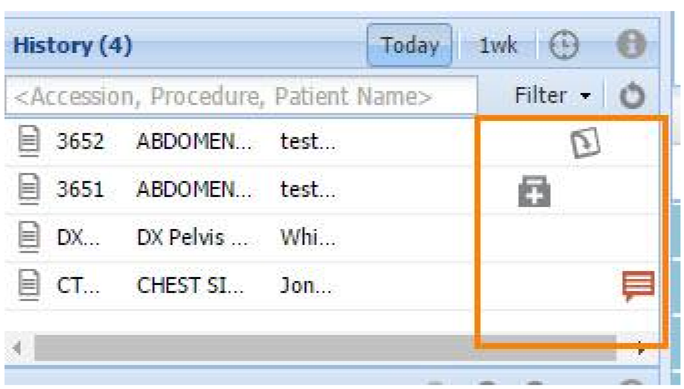


Fig. 1: Exam Tasks are visible by the History Indicators displayed in the History Panel of the Worklist.

The History Indicators are configured in the User Management section (See Figure 2) or in the User Settings accessed from the User Menu in the top right corner of Clario (See Figure 3).

Fig. 2: When a History Indicator is marked active in User Management (or User Settings accessed from the User Menu), the exam task indicator will then appear in the History Panel of the Worklist.

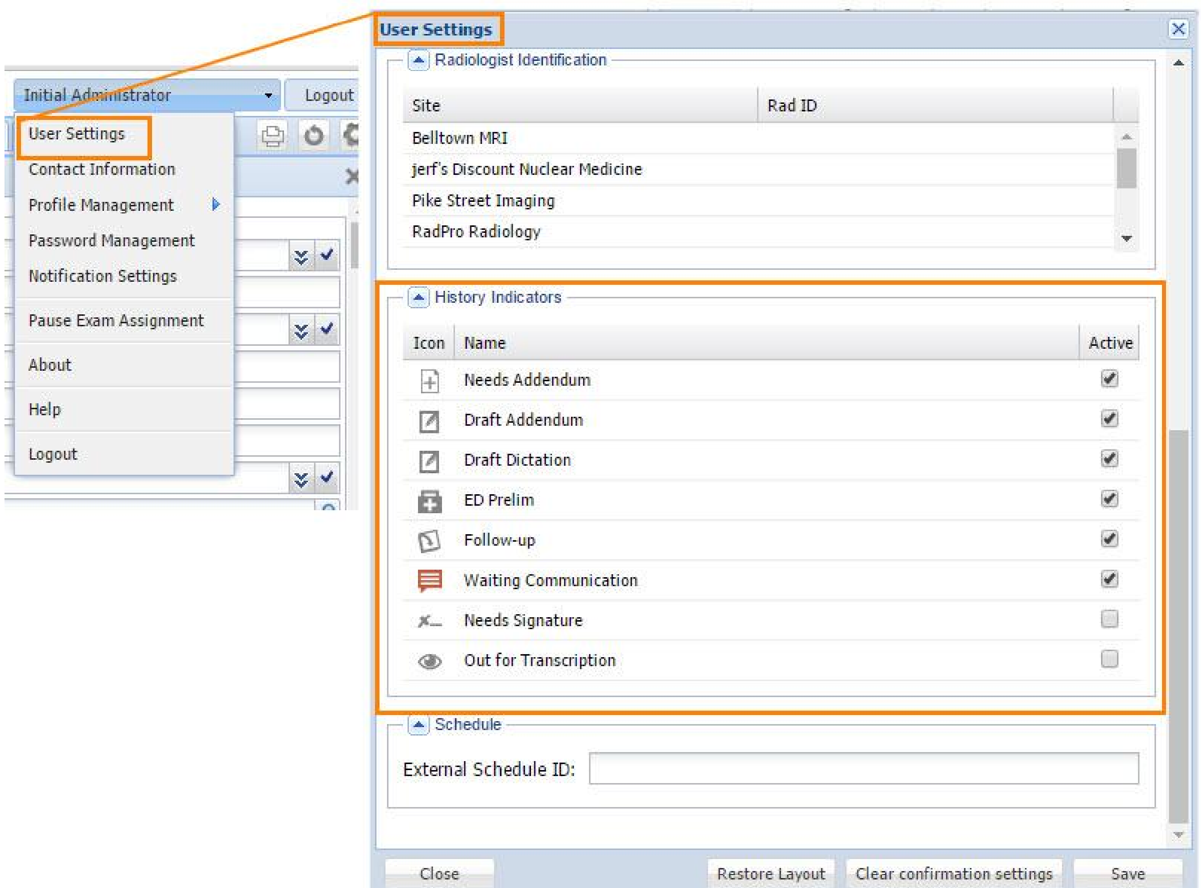


Fig. 3: User Settings are accessed from the User Menu drop-down in the upper right corner of Clario (selecting the username). History Indicators can also be configured here.

Profile Management

Default Profile and Creating Additional Profiles in Clario

Clario understands that users may be logging in from different locations throughout the workweek. Users may prefer to have different interface settings while they are in the office as opposed to when they are at home. Profiles allow the user to have several predefined collections of settings and be able to rapidly and easily switch between them.

Within User Management, the user is able to identify his or her default profile (See Figure 1.) This includes the configurations set forth in "Preferences", "Chat Preferences" and "Application Preferences".

Fig. 1: The default profile is the primary profile within Clario.

Users can create additional profiles by selecting the + icon and configuring the Preferences, Chat Preferences and Application Preferences for the new profile. (See Figure 2.)

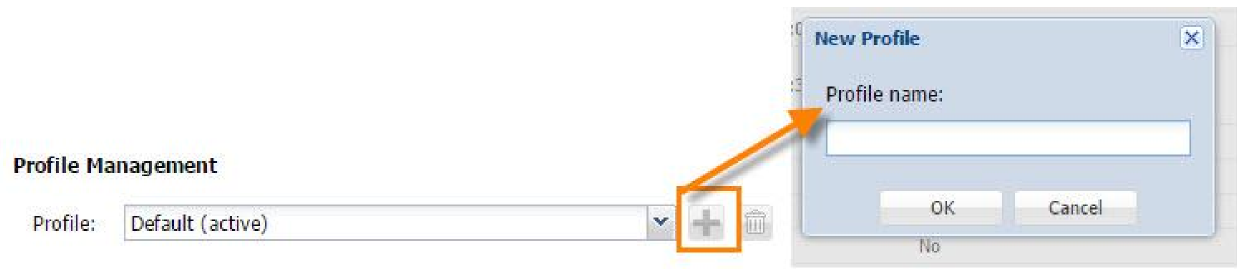


Fig. 2: When selecting the + icon, the user will be prompted to name the profile being created.

IMPORTANT NOTE: It is important to note that a new profile created will not appear until the user LOGS OUT and logs back in to Clario by selecting "Logout" at the top of the screen. (See Figure 3.)

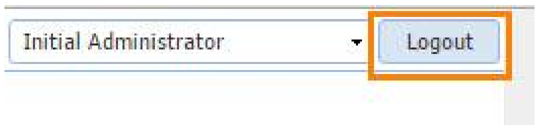


Fig. 3: Logout is found in the upper right corner of Clario. Saving changes is done so by logging out. If the user simply closes the browser, changes will not be saved.

Navigating between the different profiles is done so in the User Menu by selecting "Profile Management" (See Figure 4.) The user's profiles will appear to the right of Profile Management. The active profile will be defined with a check mark next to the said profile.

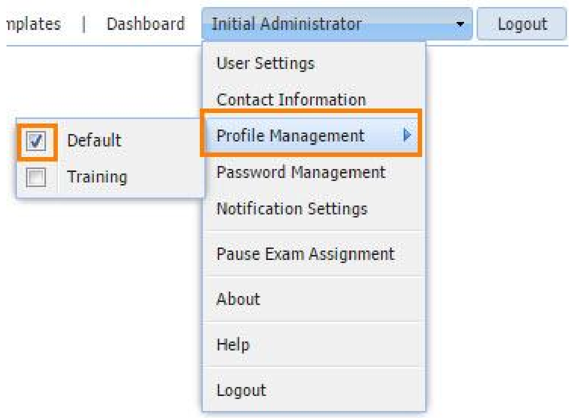


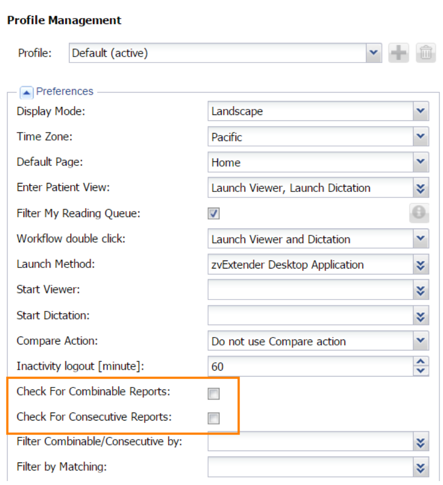
Fig. 4: Profile Management found in the User Menu displays all of the user's profiles with the active profile selected.

The Clario worklist can be set up to check for exams that might need to be combined or read consecutively. When enabled, if the radiologist selects to read an exam and the patient has multiple unread exams, the radiologist will be prompted to select which exam to combine and/or read consecutively.

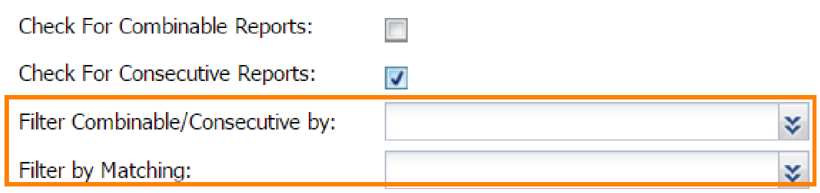
Managing Combinable and Consecutive Reports in Profile Management.

Go to User Management or select Profile Management from your user menu

Select "Check for Combinable Reports and/or "Check for Consecutive Reports"

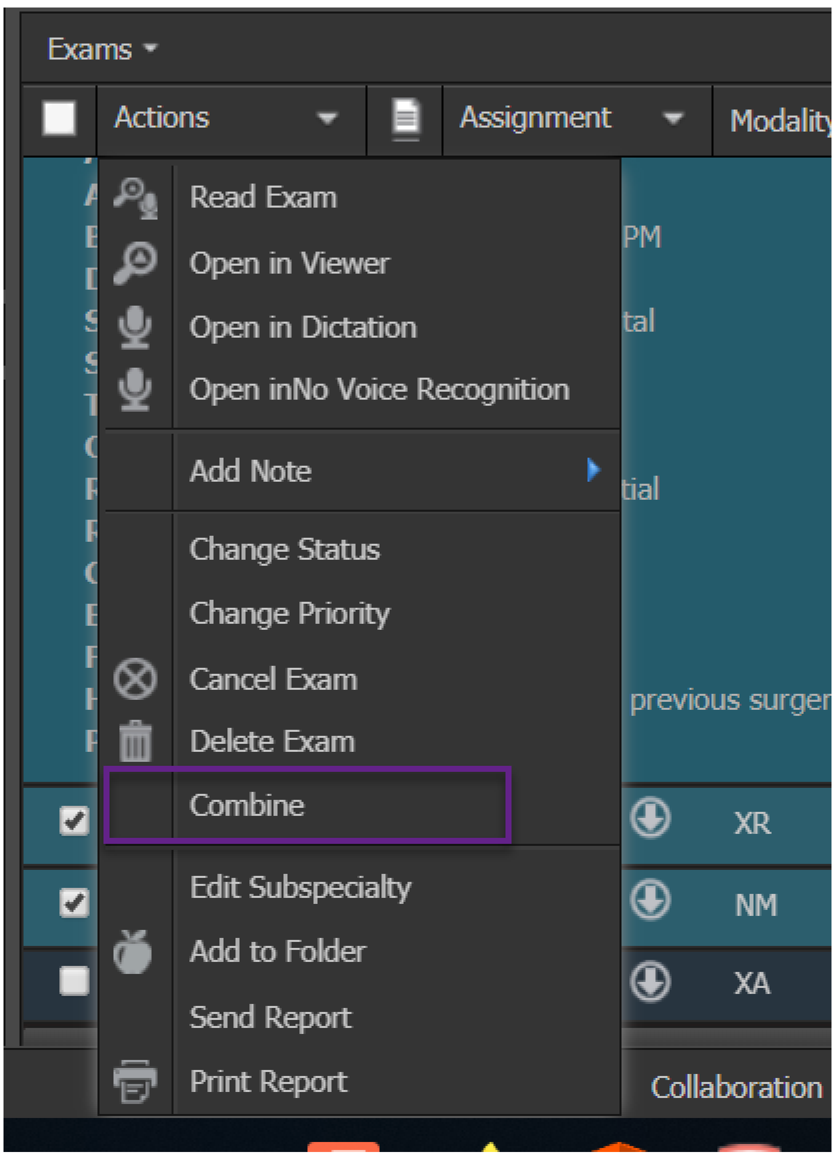


There are two options to define how the prompt behaves. You can filter the exams to show only exams tagged with specified subspecilaty using the "Filter Combinable Reports by" option. This might be used by a subspecialty radiologist who would not ever read or combine exams outside of his subspecialty. And, you can filter the list to only show exams that match the modality of the exam selected to ready by enabling the "Filter by Matching Modality" option.

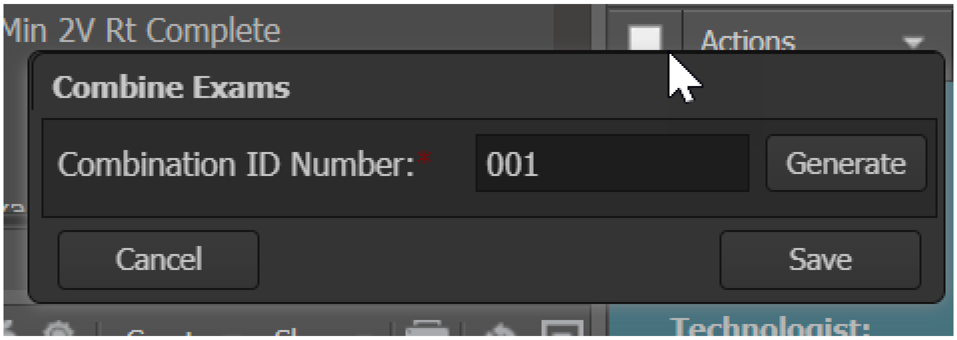


You can combine and uncombine exams in patient view. Combined exams will be opened together in an image viewer and reporting application.

To combine an exam in patient view, check mark the exams in patient view that you would like to combine. Next, click the drop down menu on the actions column and select "combine".



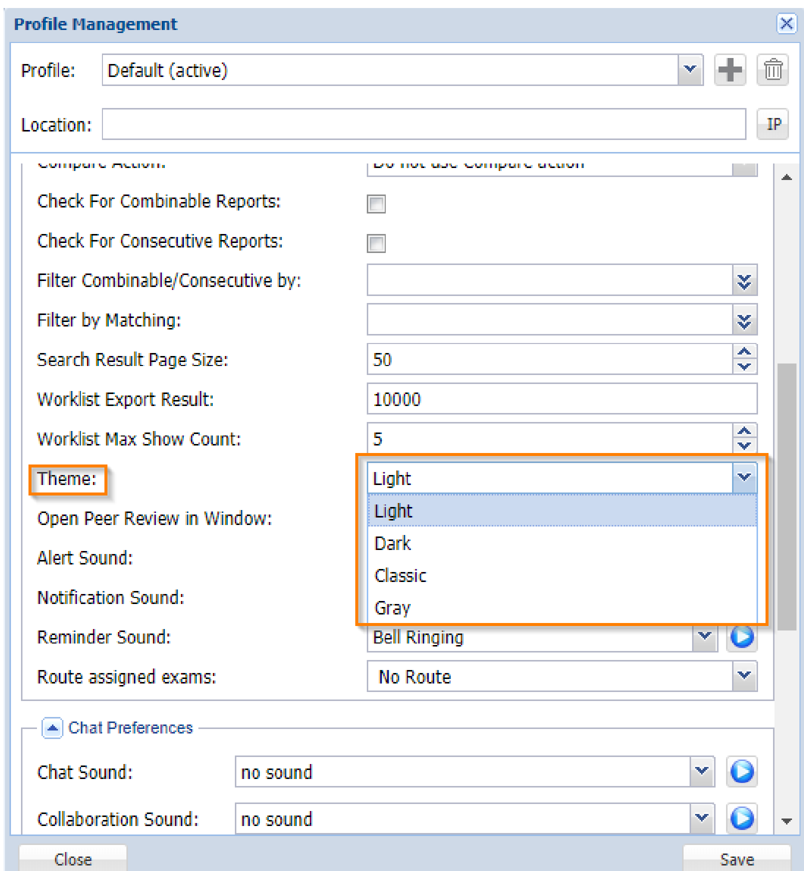
Generate a combine ID.



Proceed with launching the viewer and/or reporting software.

Managing Background Theme in Profile Management

Locate the "Theme" row and select the theme color from the drop down. Ensure to select "Save" in the bottom right of the window.



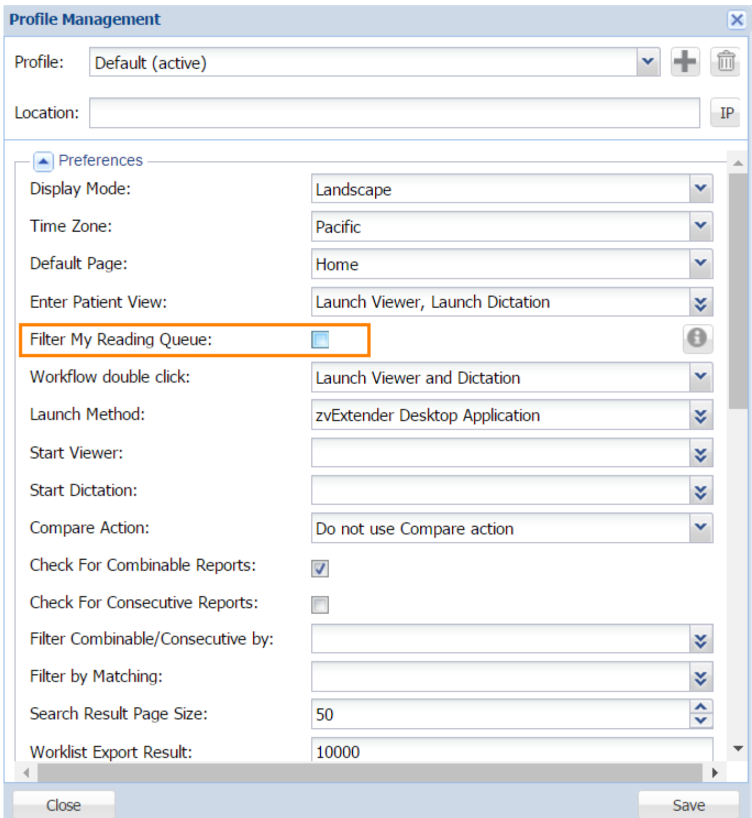
In order to see this change, make sure to Log out and back in to view your new theme.

Filter My Reading Queue in Profile Management

Clario users have the option to filter their My Reading Queue to not show exams assigned to other users and groups, or not filter and show all exams.

To configure My Reading Queue Filter:

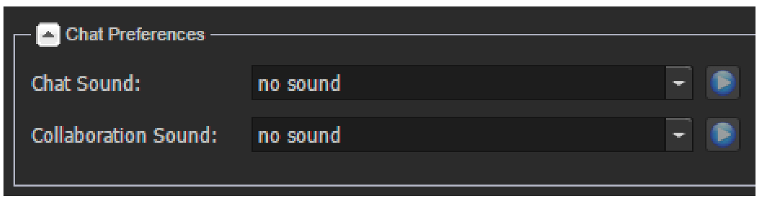
1. Go to User Management or select Profile Management from your user menu
2. Check "Filter My Reading Queue" to not show exams assigned to other users or groups
3. Do not check "Filter My Reading Queue" to show all exams, including exams assigned to other users and groups.



Chat Sound Preferences in Profile Management

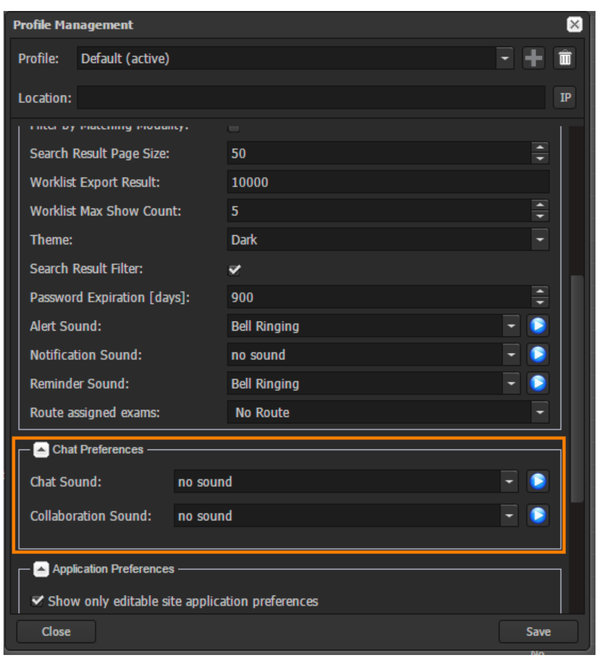
Chat sound preferences can be set by administrators or by each individual SmartWorklist user.
If you are an admin user and would like to set chat sound preferences for your team, this can be done in the Management Module.

1. Open the Management Module
2. Choose User Management
3. Select a user profile or choose to create a new user
    a. If selecting an existing profile, click the edit icon
    b. If creating a new user, click the create new user icon.
4. Scroll down to Chat Preferences
5. Select a sound
6. Click Save



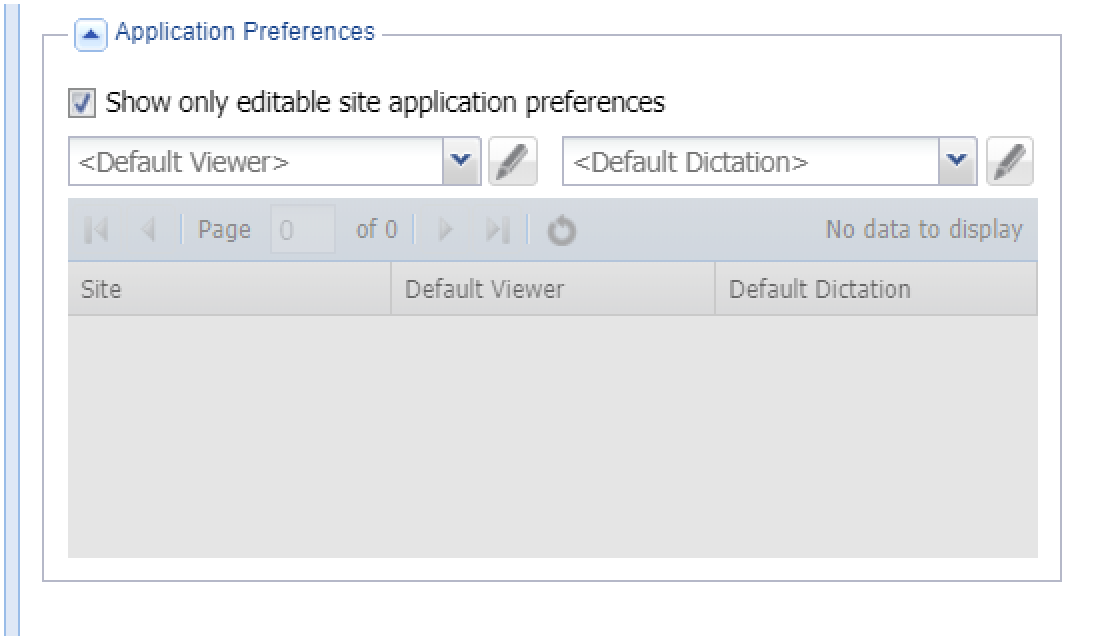
If you are not an administrator, but would like to set or change your chat preferences, this can be done from your user menu.

1. Click on your user menu in the upper right hand corner of the worklist
2. Choose Profile Management
3. Scroll down to Chat Preferences
4. Choose your chat sound
5. Click Save



Application Preferences in Profile Management

If your practice has more than one viewer or more than one dictation system configured, you can select the default viewer and default dictation per user per site.



Active Directory (AD) Access

If your practice is using AD for your user management, you will need to first ensure your users are added to their respective AD Groups within your own AD. Once this is completed, you can continue on with the configuration of AD within the SmartWorklist in order to allow the AD user access.

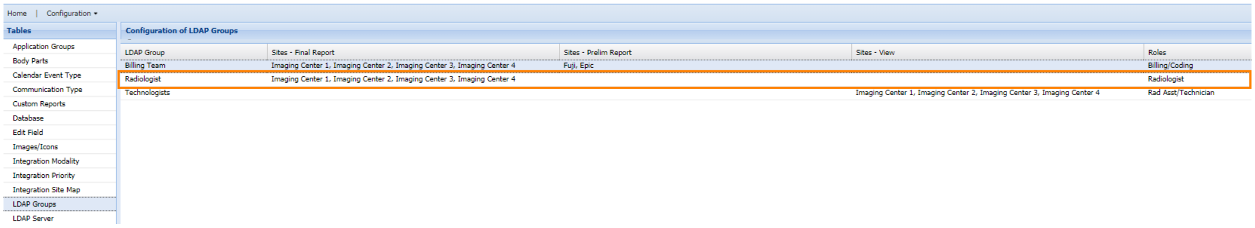
Understanding LDAP or AD Groups in Clario

Within your LDAP Domain Server, user groups can be created. These groups can then be added to the Clario UI so User Roles and/or Site Credentialing can easily be managed at a group level instead of an individual user level.

For example, an IT group could be created in LDAP. Within Clario, you can give the IT group their user role permissions at once (ex: System Admin), without the need to edit each individual users profile.

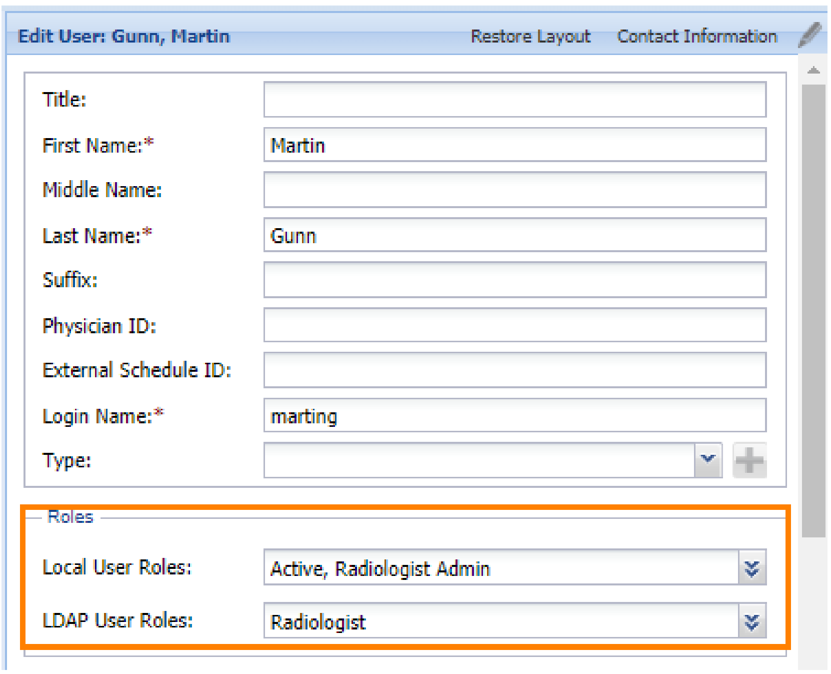
Clario recommends managing the main user roles and permissions through LDAP groups, but keep the smaller user role permissions managed locally. See example below.

In this example, all users in the Radiologist LDAP group will be given the Radiologist user role.



In addition to having the "Radiologist" user role, in Clario User Management, you have the option to also give "local user roles". As discussed previously, this is recommended for additional permissions such as Radiologist Admin or Peer Review.

User Gunn, Martin will now have all Radiologist and Radiologist Admin permissions.



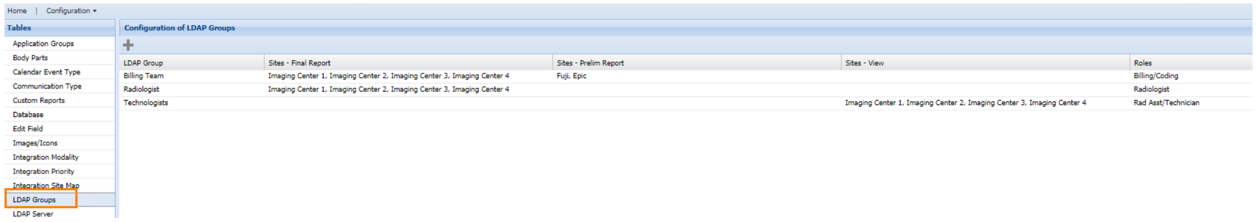
Optionally, customers can also manage Site Credentialing at a LDAP Group level. In the example below, a Community Radiologist LDAP Group was created. All users within this group will be credentialed at Community Hospital and receive the Radiologist user role.

Configuring LDAP or AD Groups

To configure LDAP Groups go to Management-->Configuration-->LDAP Groups and select "Add New LDAP Group"

LDAP Groups configured in Clario need to match **exactly** to the group names in the LDAP Domain Server

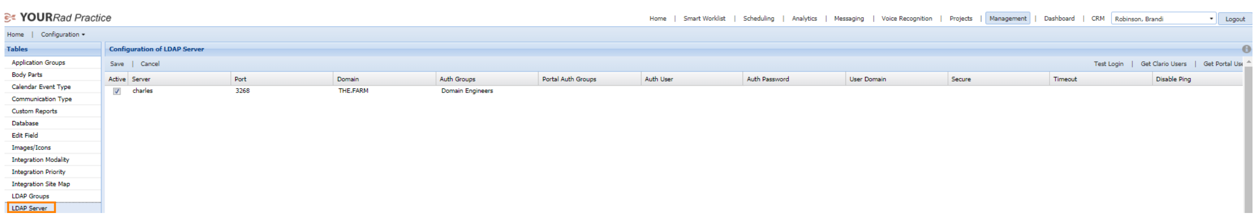
When finished selecting the appropriate configurations for the LDAP Group, hit "Save" located in the bottom right hand corner of the window.



Configuring LDAP or AD Servers

The LDAP Server configuration page is where your LDAP Domain Server is configured within Clario. Any additional AD Servers are configured by Clario Service and can be edited by the customer. The Domain Server is the "parent" where all of your LDAP users are managed.

To configure LDAP Groups go to Management-->Configuration-->LDAP Server



Ensure to enter the proper IP, Port(s), Domain and User Domain information.

Ensure to select “Save” after all pertinent information has been entered.

User Role Management

Standard SmartWorklist User Roles Defined

Standard User Roles

The Clario SmartWorklist is automatically configured with a set of standard user roles. These standard user roles have been configured based on the general needs of our customers. As each of our customer’s needs are unique, we have designed the system with complete configurability. Therefore each of the user roles can be configured to the exact needs of the customer. It is important to keep in mind that user roles are considered “Additive”. That is, if a user has multiple roles, one will not supersede the other, but rather the user will have all access enabled in all of the multiple roles added together.

The standard user roles are as follows:

Active: Clario SmartWorklist Access

Business Manager: Create practice wide reports and communicate results to customers (ED, referring physicians)

Clario Service Admin: Perform any task, except ready, modifying, or peer reviewing exams.

Multi-System User: Multi-System user role.

Peer Review Admin: Create practice wide Peer Review reports

Rad Assistant: Perform tasks so that the Radiologist/ Resident can read the exam

Radiologist: Read, modify, and peer review exams using Viewer and dictation. Create reports on their own statistics.

Radiologist Admin: Assign roles to Radiologists, such as Peer Review

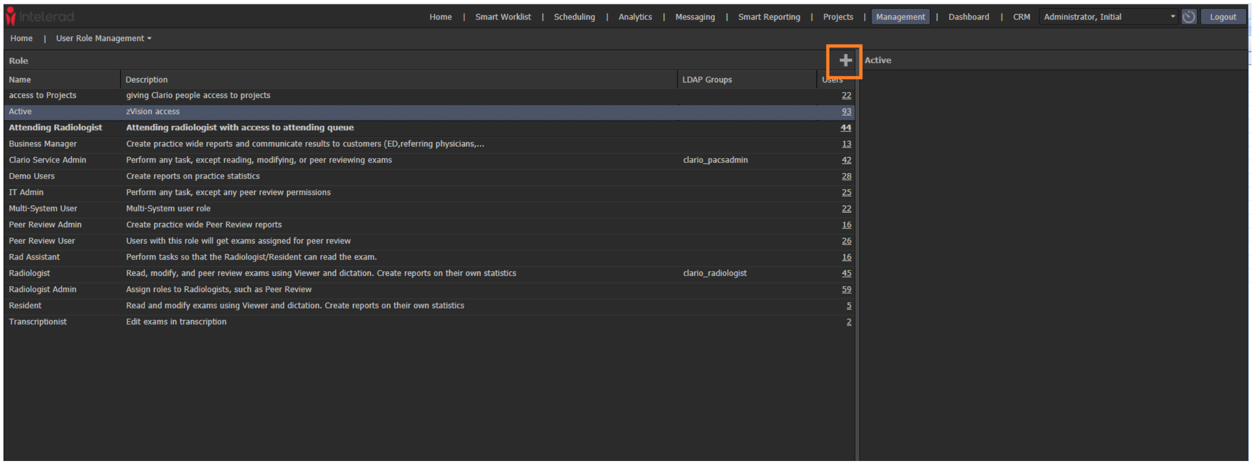
Resident: Read and modify exams using Viewer and dictation. Create reports on their own statistics.

System Admin: Perform any task, except any peer review permissions.

Role	
Name	Description
Active	zVision access
Business Manager	Create practice wide reports and communicate results to customers (ED, referring physicians, ...
Clario Service Admin	Perform any task, except reading, modifying, or peer reviewing exams
Multi-System User	Multi-System user role
Peer Review Admin	Create practice wide Peer Review reports
Rad Assistant	Perform tasks so that the Radiologist/Resident can read the exam.
Radiologist	Read, modify, and peer review exams using Viewer and dictation. Create reports on their own statistics
Radiologist Admin	Assign roles to Radiologists, such as Peer Review
Resident	Read and modify exams using Viewer and dictation. Create reports on their own statistics
System Admin	Perform any task, except any peer review permissions

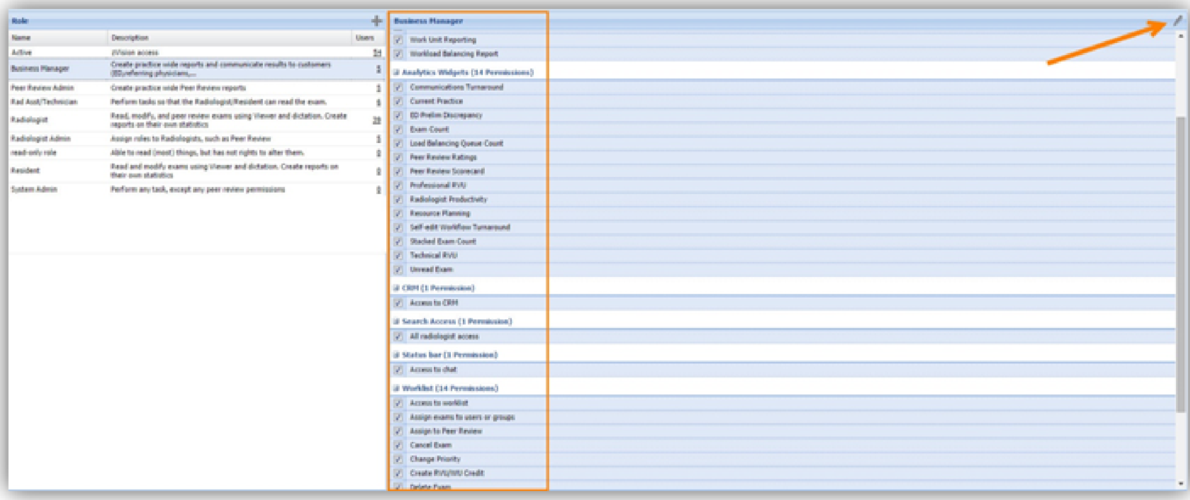
How to Create a User Role

Creating a new User Role in the Clario SmartWorklist is quite simple.
Navigate to Management> User Role Management
Select the + Icon.
A Panel to the right will open up allowing you to select the permissions to enable for the user role, as well as name the user Role.
You will also be able to indicate if the User should be mapped to an LDAP Group here.
Once done configuring, ensure to select the save button.

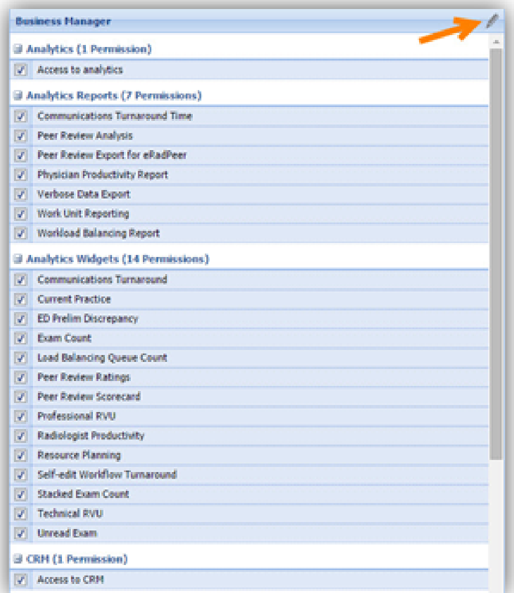


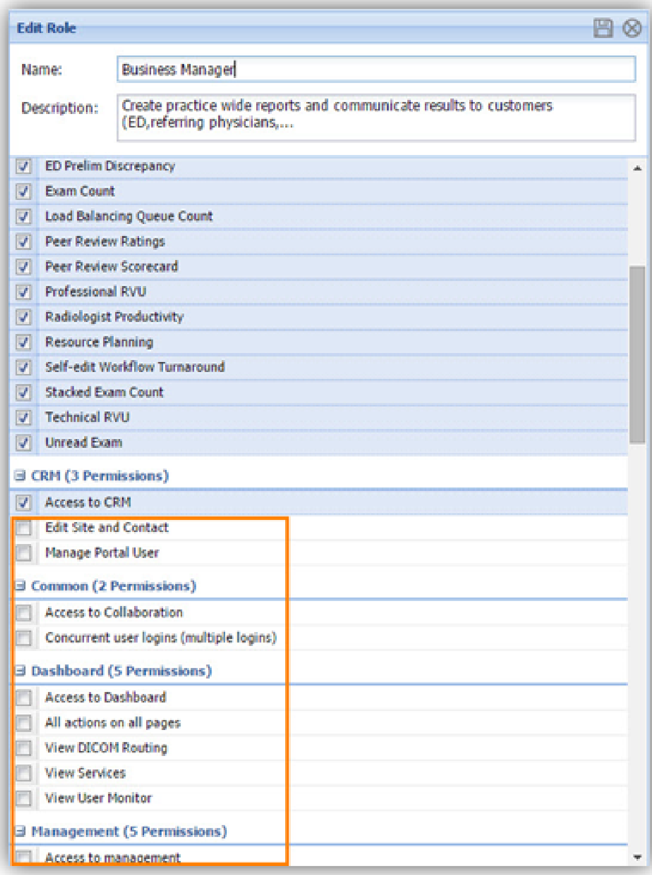
How to Edit a User Role

When selecting a user role, it may appear that all permissions for the role (listed to the right of the role) are enabled. However, unless the role is in edit mode (selecting the pencil in the upper right corner), one will only see enabled permissions.



By selecting the pencil to edit the user role, the permissions will expand to display all permissions: those enabled and those that are not.



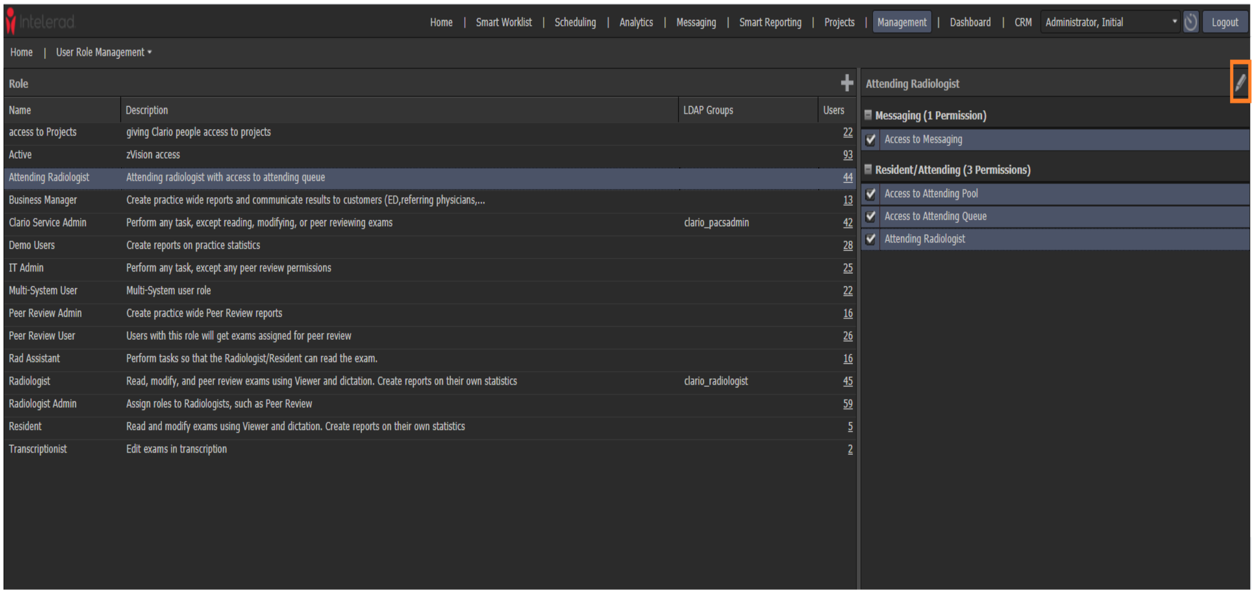


Notice the permissions that appeared unchecked. These permissions are not standard for this user role, however can be checked to enable for said user role.

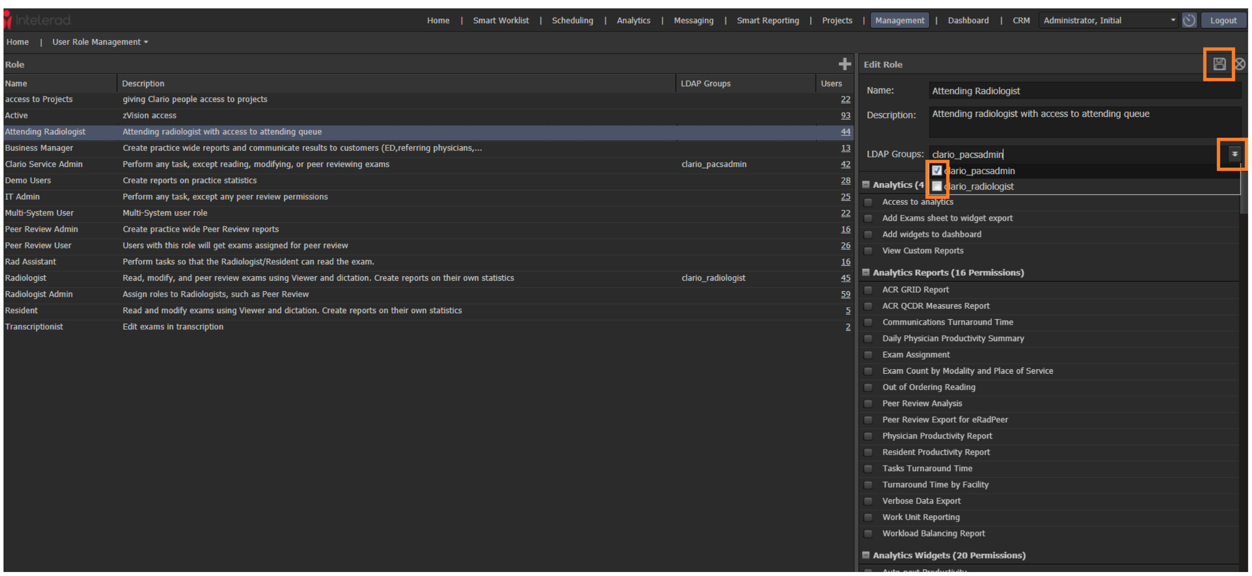
Once done editing, ensure to select save.

How to Link a User Role to Active Directory Groups

Linking a User Role to an Active Directory Group within the Clario SmartWorklist application is quite simple.
Once the LDAP Server and LDAP Groups have been configured in the Configuration section of Clario
See: LDAP Groups and Configuring LDAP Server
You can then link corresponding AD Groups to User Roles.
Navigate to Management> User Role Management.
Select the User Role you would like to link to an AD Group.
Select the Pencil Icon to Edit the User.



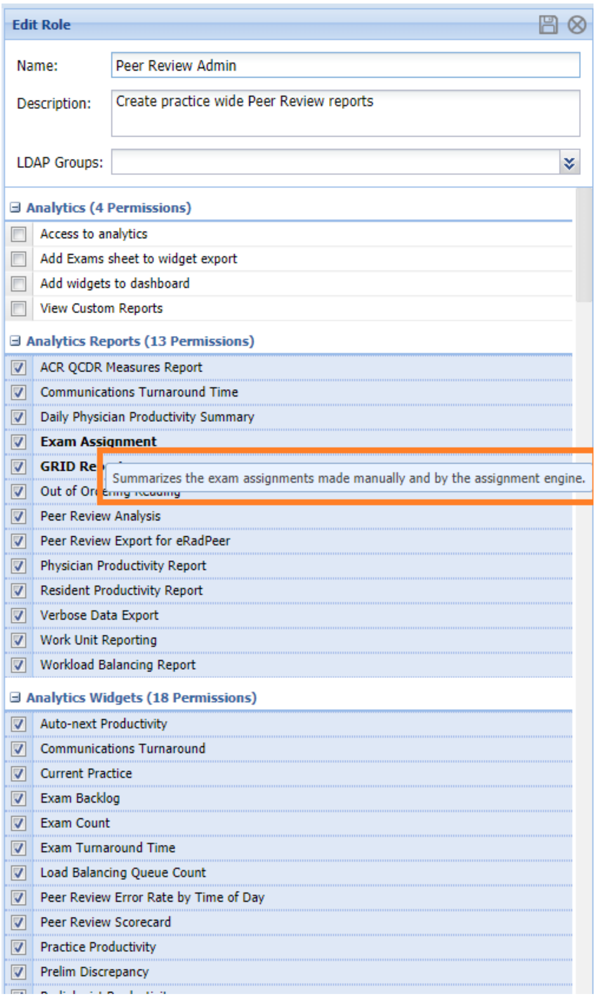
Once in Edit Mode, Select the Corresponding LDAP Group(s) to link to the User Role. More than one LDAP Group can be linked to a User Role.



Ensure to select save when complete.

Understanding User Role Permissions

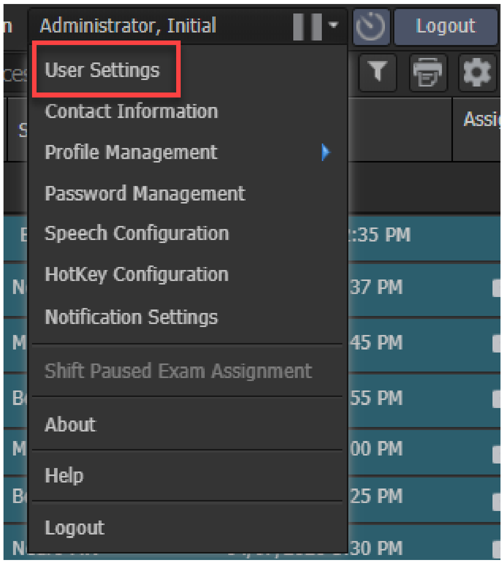
The Clario SmartWorklist has many user role permissions to enable. With each new version release, more user role permissions may be added to the table. Thus to ensure users are most up to date on user role permission functionality, we have enabled a feather that allows the user to hover over the permission (while in edit mode) to see a description of what the user role permission enables.



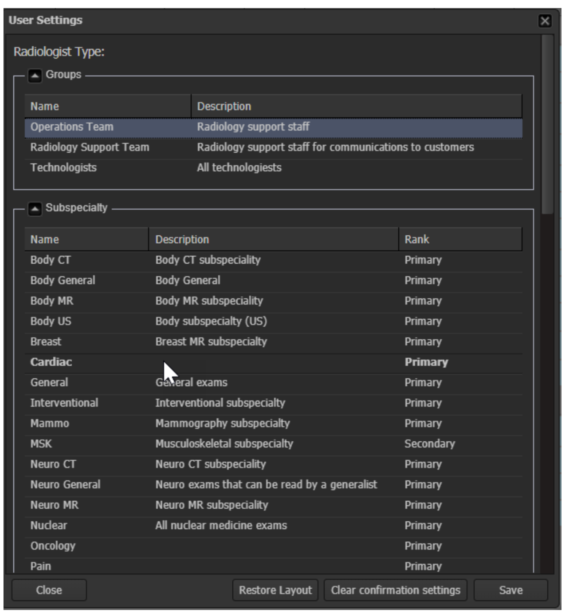
User Preferences

User Settings

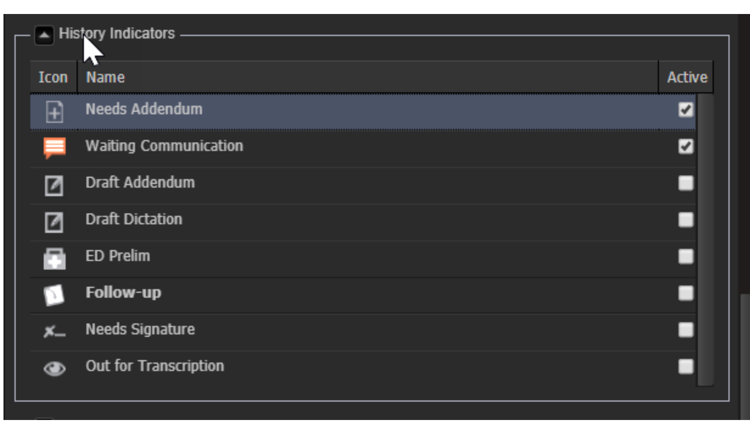
You have the ability to view all of your user settings by going to the “User Settings” menu (Selecting your login name in the upper right hand corner of your screen).



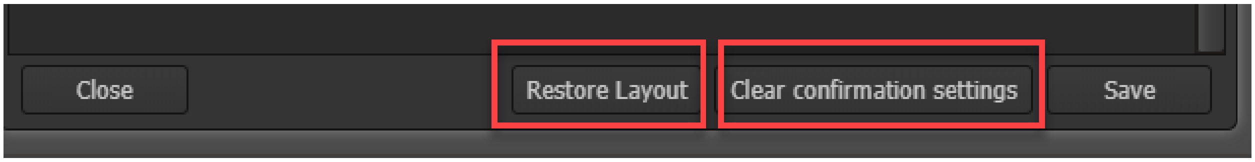
This menu will show you all of your user settings, such as what groups you are in, your subspecialties, practices, and roles.



You can also select history indicators from this menu. To do this, scroll down to the history indicators section of user settings. You can activate or deactivate certain history indicators, depending on how many icons you like to see on your worklist.

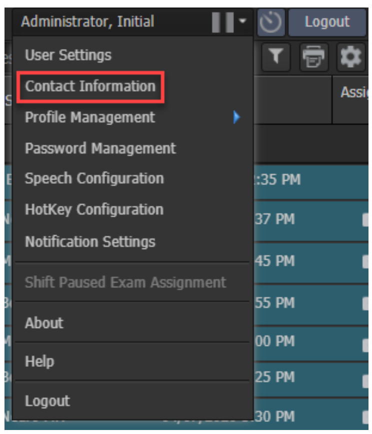


From user settings, you can also restore your layout and clear any confirmation settings. Restoring your layout will take your worklist layout, such as column width/order and panel sizing, back to default. Clearing any confirmation settings will clear any pop up settings that you have selected to “never show again”.



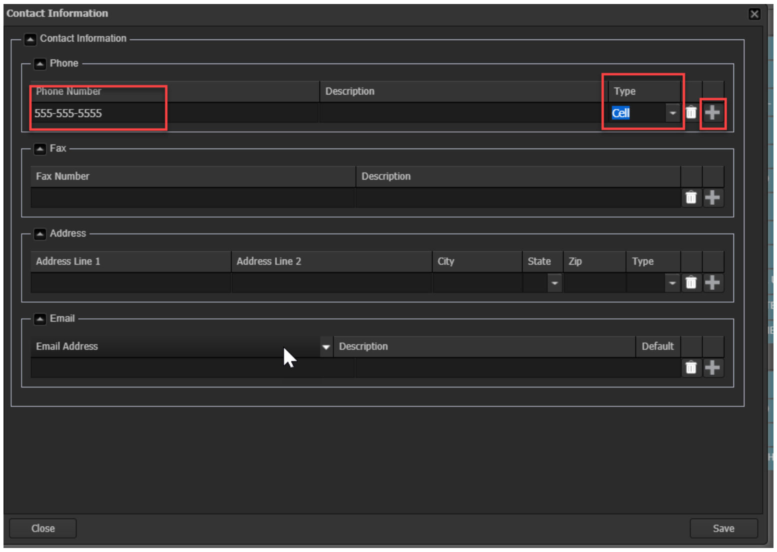
Contact Information

In order for specific functionality to work within the Clario SmartWorklist, such as notifications via email, or emailed reports, you will want to add your contact information into the Smart Worklist. To do this, go to contact management in the top right corner of the screen.



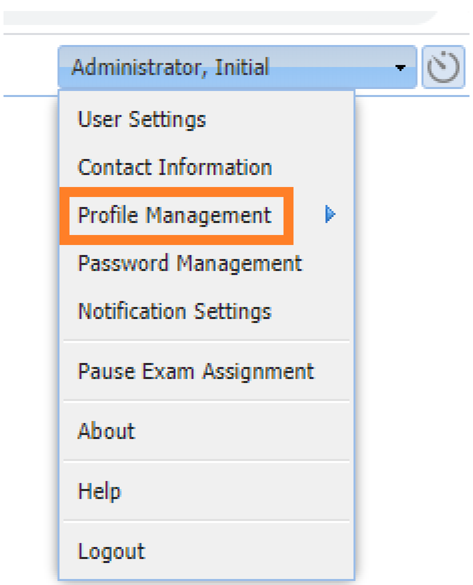
You will be presented with a pop out window where you may add your phone number, fax number, address, and email address. If you add any of this information, it will populate in the messaging application. For more information about the messaging application, please see the messaging section of this packet. If you enter your email, you will be able to receive email notifications from the Smart Worklist.

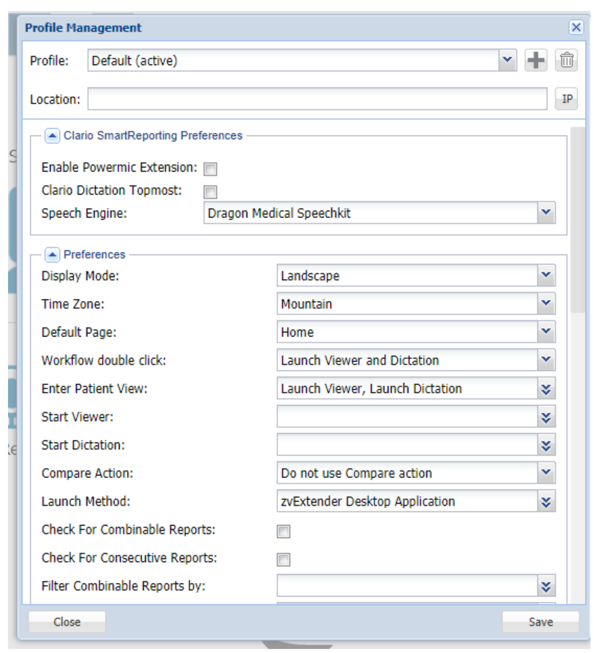
Enter the desired information, select a type (if applicable), then click the “+” button to add the information. Don’t forget to save. You delete contact information at any time by selecting the trash can icon.



Profile Management

As discussed in the Access> User Management Overview> Profile Management section of this guide, users can set up multiple profiles as well as change profile settings. By selecting “Profile Management” from the drop down when selecting your user name in the upper right hand corner, a pop out window will appear with all of the Profile Management configurations for that specific user.

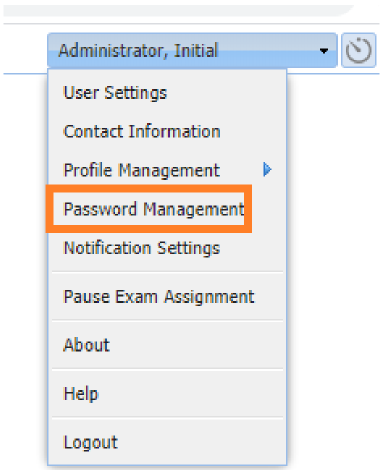




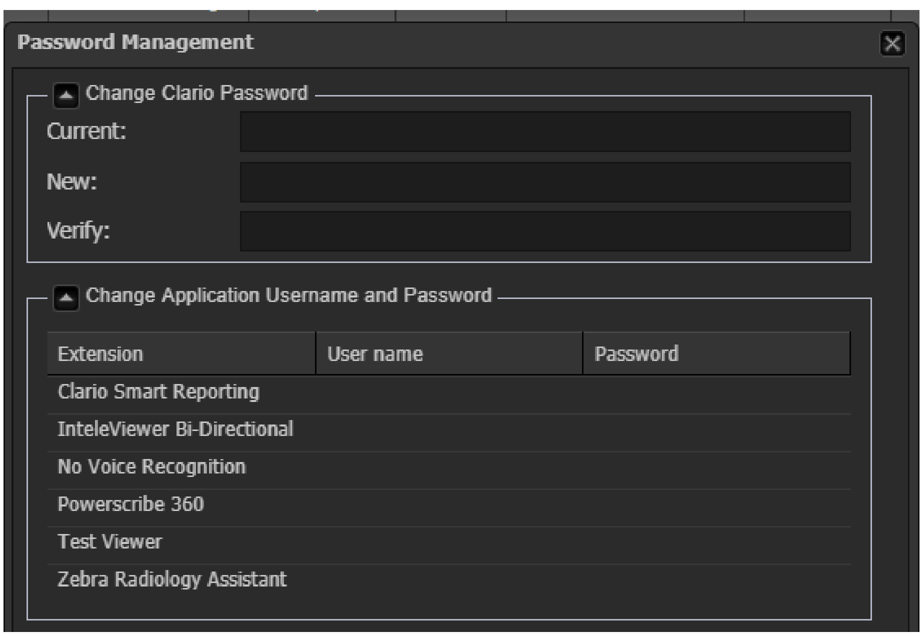
Password Management

If ever there is an application that Clario SmartWorklist is launching wherein user credentials are not managed in your AD, you will use this section to allow each user to enter their specific passwords for individual applications. If the application is managed by LDAP, this section is not applicable.

To manage your password in the Smart Worklist, go to the “Password Management” selection in the upper right hand corner of the screen.

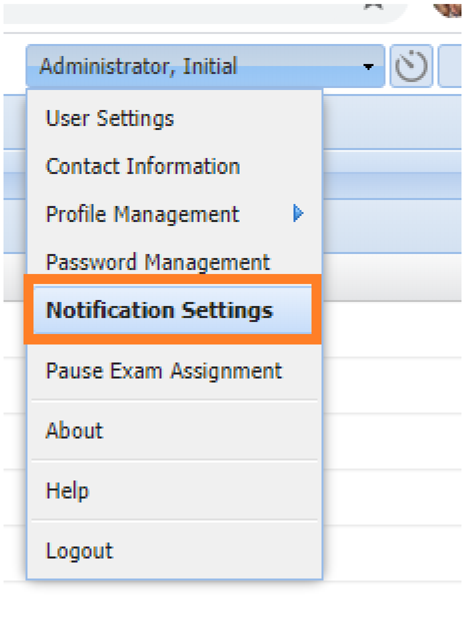


From this window, you can edit your current Smart Worklist password. You can also enter your username and password for other applications that you are launching from the Smart Worklist.

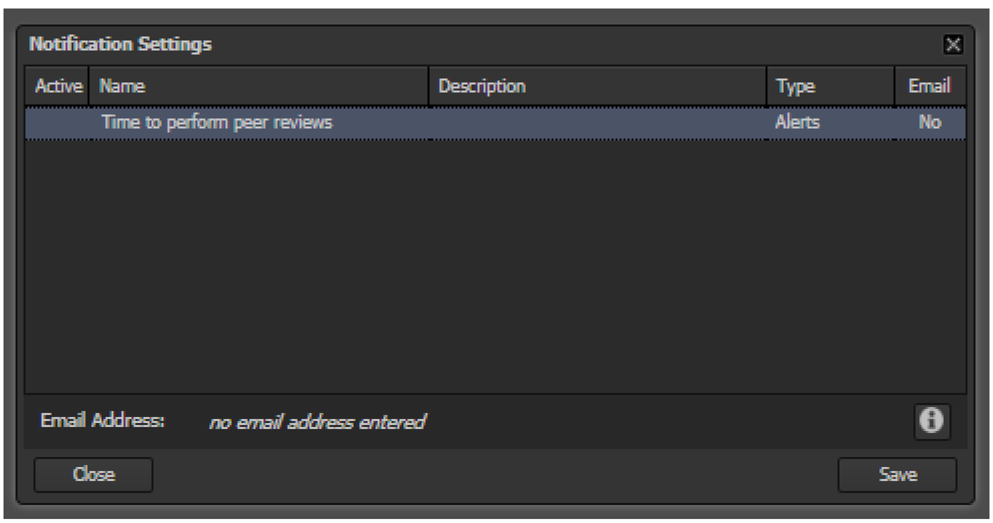


Notification Settings

When selecting your name in the upper right hand corner, the last selectable option is “Notification Settings”. By selecting “Notification Settings” the user is able to visibly see all of the notifications and alerts they are configured to see in the system.



A Pop Out window displays all of the different notifications. If the notification was configured to allow users to “Opt Out” of seeing the notification, they would be able to do so in the Pop Out Window.



Management

Credentialing

Within Clario- users can be given credentialing permissions to dictate or view exams.

User Credentialing Module

There are three levels of credentialing:

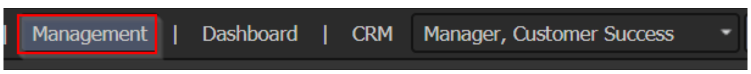
Final- Can launch VR and dictate a report

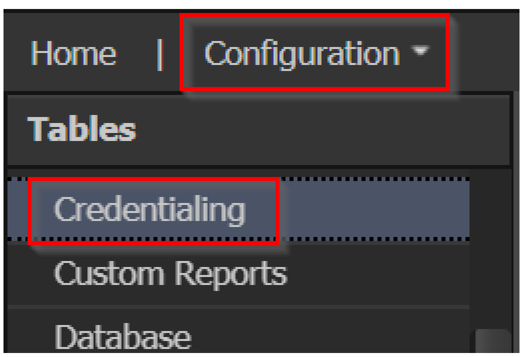
Prelim- Can launch VR and dictate a prelim report (Only applicable if using Clario Reporting)

View- Can view the exam and launch the viewer but can not launch VR

Credentialing Configuration

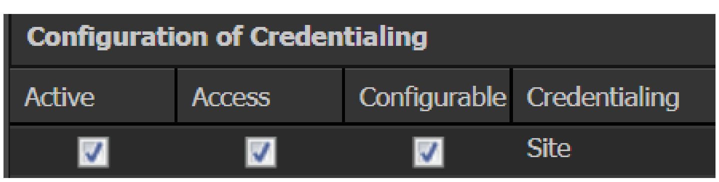
In order to turn on credentialing, users will need to go to their management tab, then into configuration. Once under the configuration tab- please select the credentialing module.





Configuration Stages of Credentialing

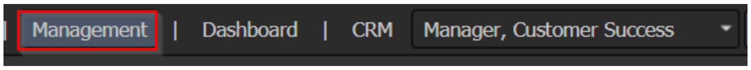
Active- a user will not be able to see exams related to that site, subspecialty, etc.
Access- a user will still be able to access exams related to that site, subspecialty, etc.
Configurable- an administrative user can configure the credentialing before making it active

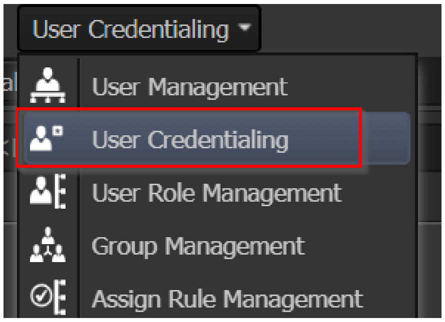


Configuration of Credentialing			
Active	Access	Configurable	Credentialing
☑	☑	☑	Site

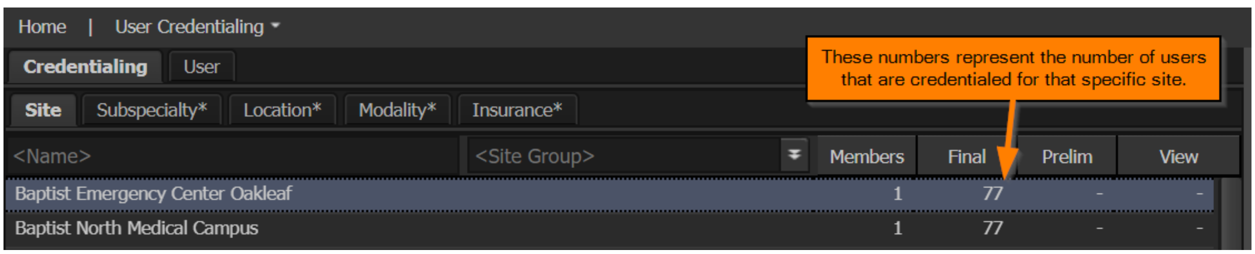
How to credential a user

To Credential a user, admins will need to go into their management tab and select the user credentialing module from the drop down menu.

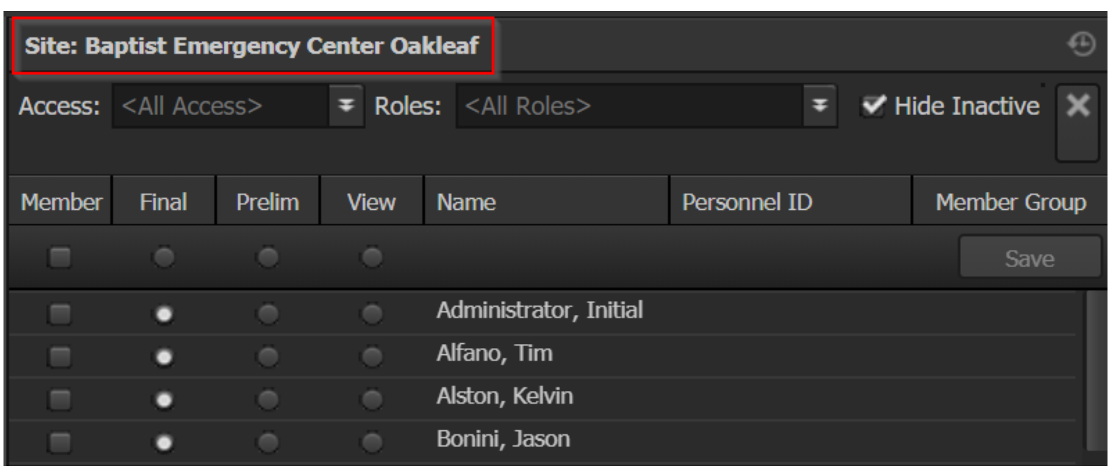




Once you are in the user credentialing module, you will see all the sites listed. Each site will quickly tell you how many users it has credentialed in it by glancing at the number to the right of the site (shown here)



However if you click on each site - you will see an updated window will appear on the right side of the screen showing all the users in the system and how they are credentialed.



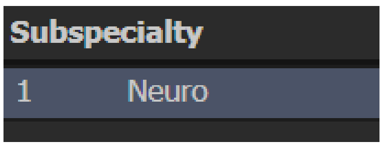
Group Management

Groups are used to tag a set of exams with a subspecialty name or to define a group of users.

Subspecialty Groups vs Groups

Subspecialty groups

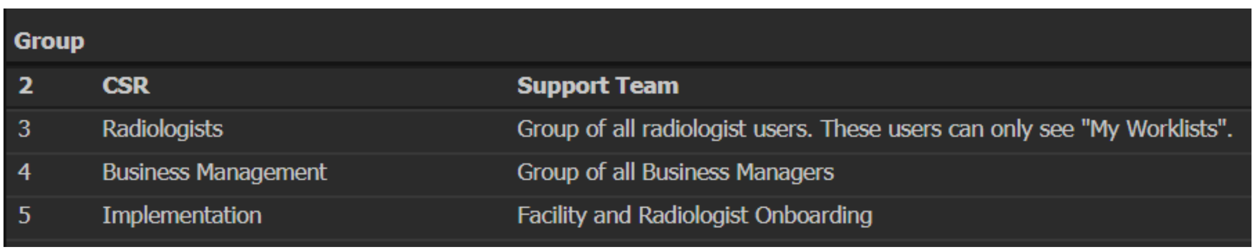
Used to group exams based on exam definition and tag it with a subspeciality name



Subspecialty	
1	Neuro

Groups

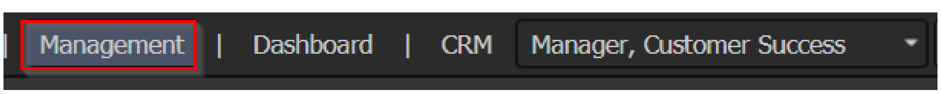
Used to define a group of users

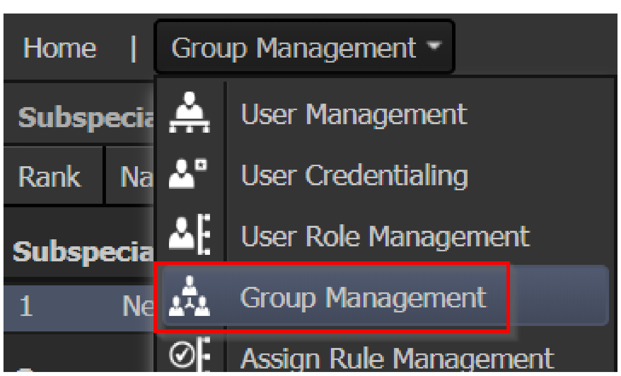


Group		
2	CSR	Support Team
3	Radiologists	Group of all radiologist users. These users can only see "My Worklists".
4	Business Management	Group of all Business Managers
5	Implementation	Facility and Radiologist Onboarding

How to Add a Group

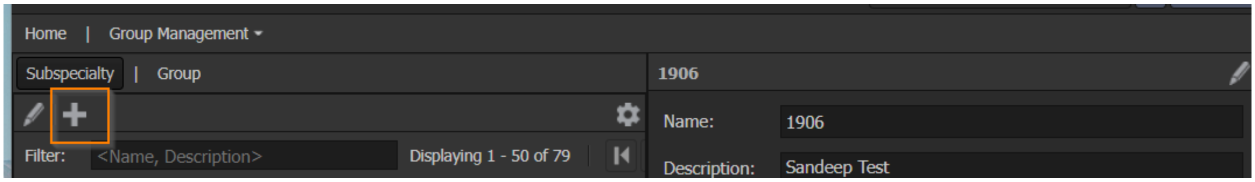
In order to create a new group, admins will need to open the management tab and click the group management module from the drop down menu.



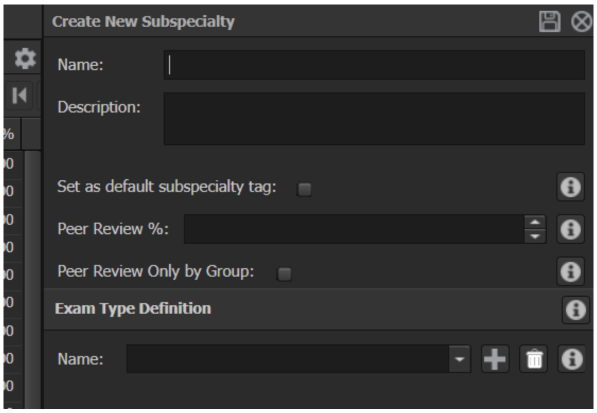


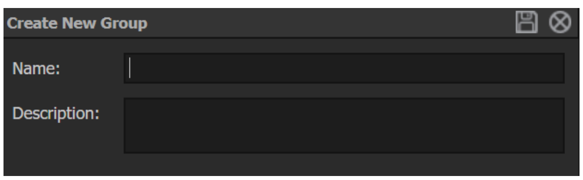
Once the group management module is opened, admins will see a list of current groups. In order to create a new group, click on the '+' icon in the upper right of the module.

Once the add icon has been selected a drop down appears asking which group is being created- select either subspeciality or group.



Once you have selected the type of group you are creating- an empty group definition page will appear on the right hand side of the screen. Enter as much information as you would like. Once you have the information filled in, select the save button in the top right corner.



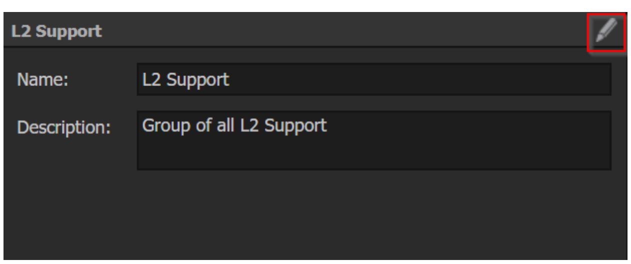


How to Edit a Group

In order to edit an existing group- admins will need to select the management tab and select the group management tab.

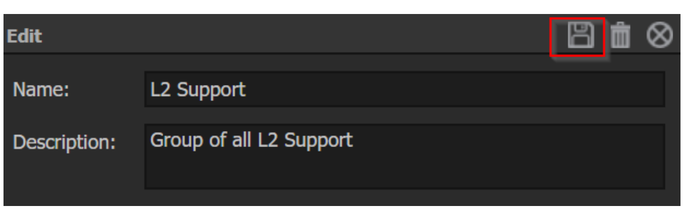
Select the group to edit from the group panel

Click the edit icon in the top right of the selected group panel



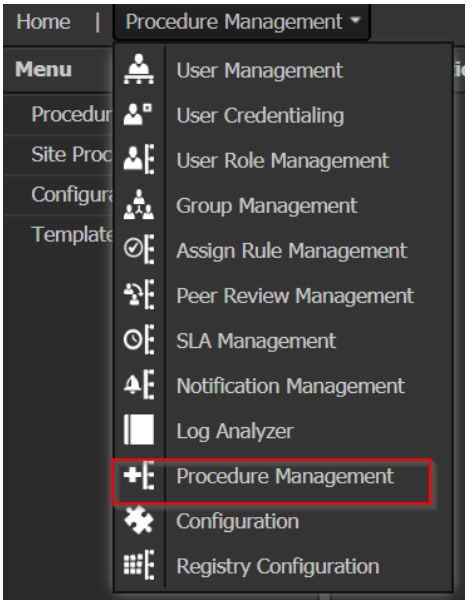
Perform the desired edits

Click the save icon in the top right corner of the edit panel



Procedure Management

To open the procedure management module - admins will need to select the management module and then select procedure management from the dropdown menu.



Procedure VS. Site Procedure Defined

Procedure: On this page you define your normalized procedure codes.
Site Procedure: This shows all Site Procedures (name and code) received into Clario and the values for each field

Procedure

In order to map the procedures- click on the word procedure on the left hand column.
Procedures refers to the internal, normalized Procedure Name and Procedure Code combination for the radiology practice. Any Site Procedures that are mapped to a Procedure, will adopt the properties from the normalized Procedure.
Procedure Name and Code: Procedures must be unique, meaning the combination of Procedure Name and Procedure Code must be unique.
Subspecialty: If you choose to manage subspecialty tagging in Procedure Management, you can set subspecialty on each Procedure individually.
Modality.
Body Part: Body part is automatically populated based on key words identified in the procedure name.
HCPCS/CPT: You can map your procedures to CPT codes, making it easier to manage Tech RVU, Pro RVU, Work Unit and MIPS Code mapping.
Special Handling: Processes can be configured by Clario Service to process specific procedures differently than normal.

Site Procedure

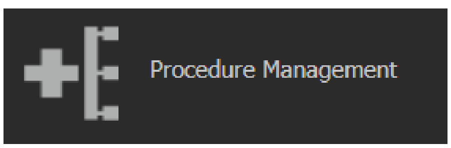
In order to open the site procedure module, click on the words site procedure on the left hand column.

A Site Procedure refers to the combination of Site, Site Procedure Name and Site Procedure Code.
Site Procedures must be unique within each site using one of two configuration options:
The combination of Site, Name and Code must be unique.
The combination of Site and Code must be unique. If the Name is different you can configure Name to override or not override.

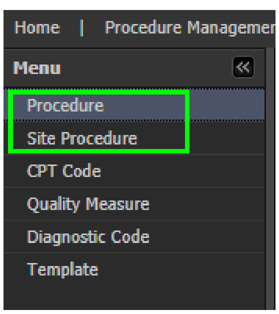
Please note, Site Procedures (Site Procedure Name and Site Procedure Code) are automatically added to the Site Procedures configuration page with an inactive flag.

Creating a new Procedure Code or Site procedure Code

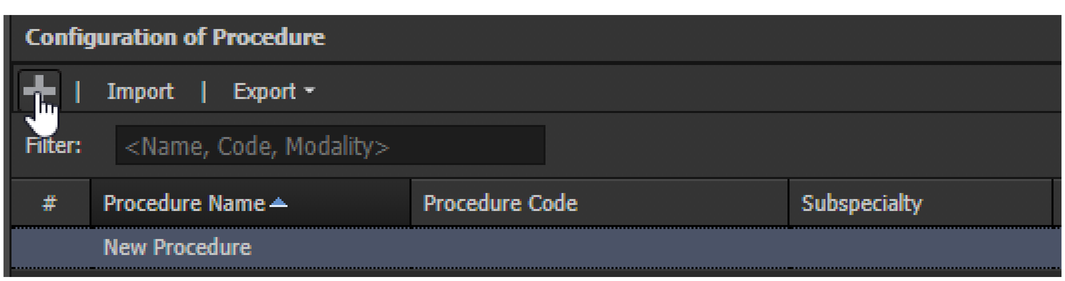
1. Log into Clario > Management > Procedure Management



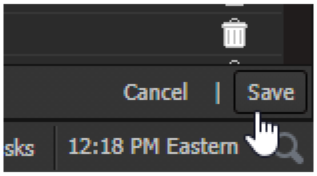
2. Select Procedure or Site Procedure



3. For Procedure Codes
   a. Click the  sign.
   b. A new Row will be created. Double click in the columns to insert the information needed.



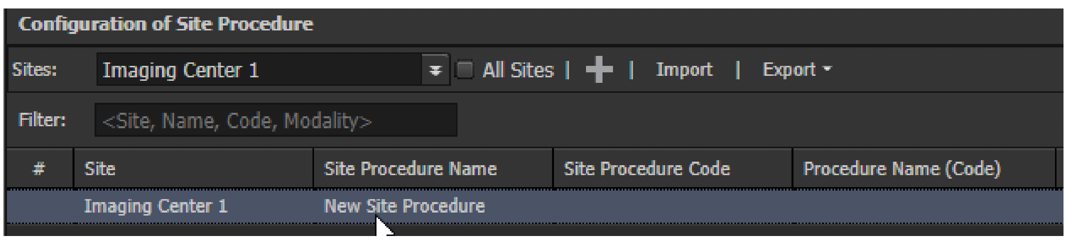
   c. Once completed, Save new entries.



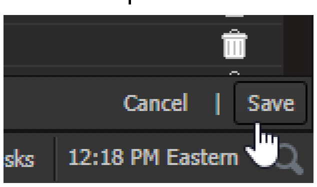
4. For Site Procedures
    a. Select the individual Site(s) or check All Sites

    b. Click the  Sign to create a new Site Procedure Code

    c. A new row will appear. Double click the columns to enter the information needed.

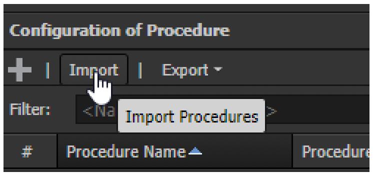


    d. Once Completed Save New Entries

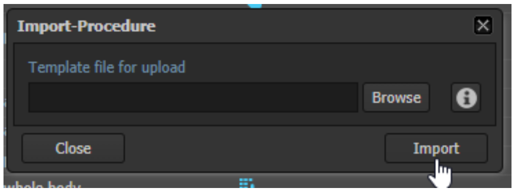


Importing New Procedure or Site Procedure Codes

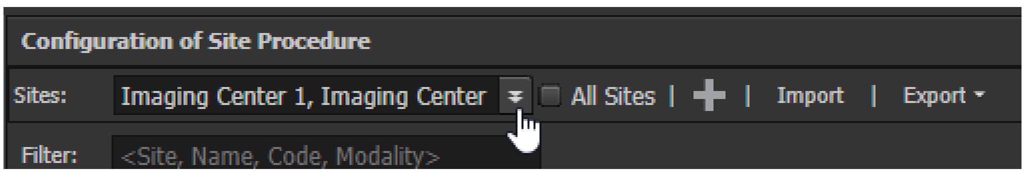
1. Prior to importing the procedure management file, ensure it is formatted correctly to ensure a successful import.
2. Log into Clario > Management > Procedure Management
3. Select Procedure or Site Procedure Table
4. For Procedure Codes
    a. Select Import



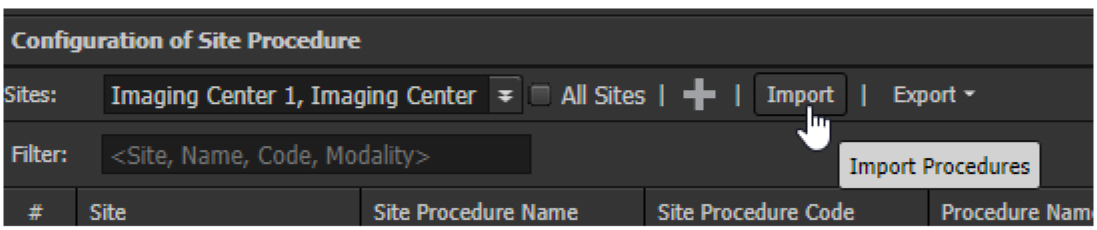
b. Browse to the file location and Import



5. For Site Procedures.
    a. Select the individual Site(s) or check All Sites



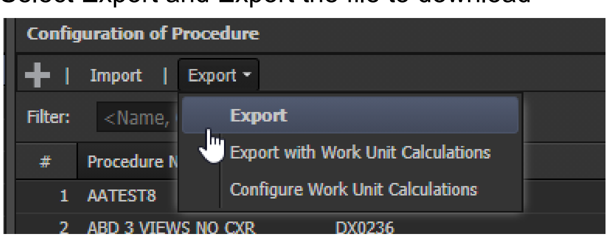
    b. Select Import



    c. Browse to file and Import

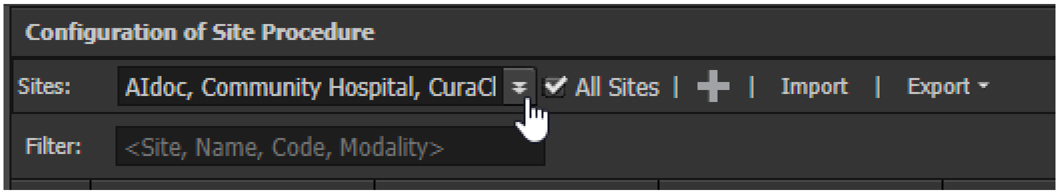
Exporting Procedure or Site Procedure Codes

1. Log into Clario > Management > Procedure Management
2. Select Procedure or Site Procedure Table
3. For Procedure Codes
    a. Select Export and Export the file to download

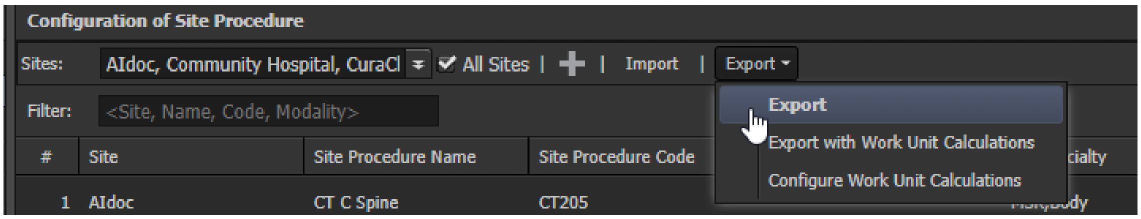


4. For Site Procedures
    a. Select the individual Site(s) or Check All Sites

i. If multiple sites or all sites are selected, Clario will download a file for each Site.



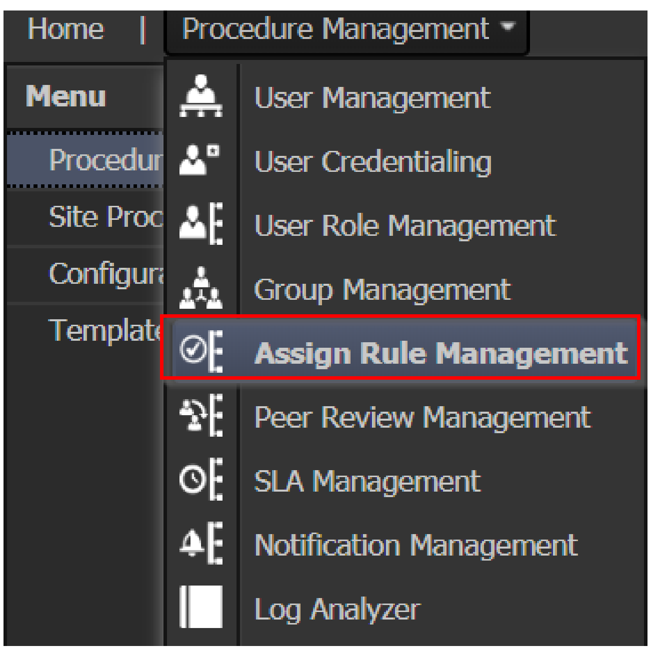
b. Select Export to download the file



Assignment Rule Management

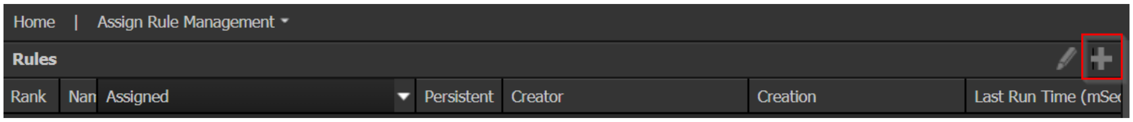
Clario can be setup to automatically assign exams to users, groups or shifts or assignments can be load balanced across a group or shift.

To open the assignment rule module, admins will need to open their management tab and select Assign Rule Management from the dropdown menu.

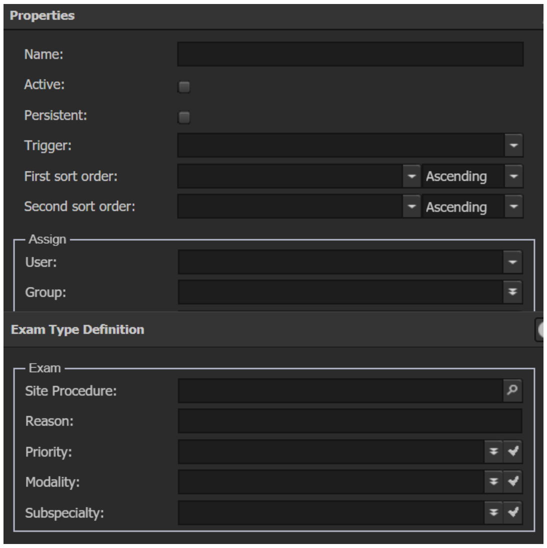


How to create an Assignment Rule

Click the Add New Rule (plus) icon in the top right corner of the Assignment Rules panel.

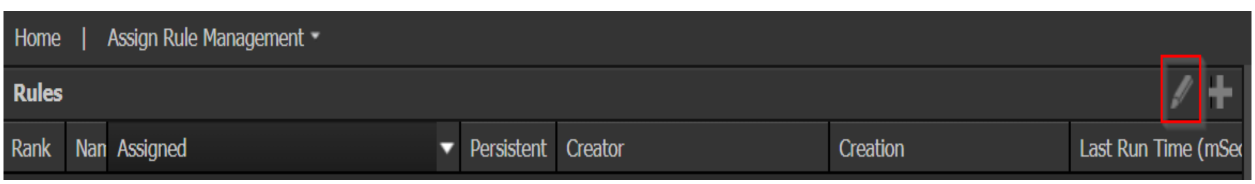


Define the assignment rule based on the properties- be sure to hit the save button in the upper right corner.

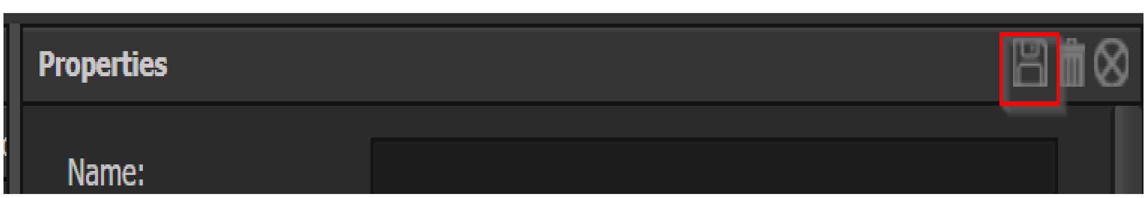


How to edit an Assignment Rule

Select the rule that needs to be edited.
Click the edit icon (pencil) in the top right corner



Perform the desired edits
Save all changes by selecting the save button in the top right corner.



Assignment Rules Overview

Properties

Name- Descriptive name of the assignment rule

Persistent - Enable persistent assignment to assign the exam even if the user/group is not currently logged in and keep it assigned if the user/group logs out of Clario.
Trigger- The exam's status that triggers the assignment rule to run. Currently, there are 2 statuses used to trigger exam assignments: Unread and Prelim
Sort Order- Order in which to assign pool of exams (Exam time, Time Remaining, Priority)
Assign- select either a user or a group
User- Select a single user for assignment.
Group- Select a group or multiple groups for assignment.
Active times- An assignment rule "Active Time" can be set to define the time the rule should be active.
DICOM Route- Enable to route the exam to a specified AE title when the exam is assigned.
Load Balancing- Load balancing must be enabled if the rule assigns exams to a shift. Optionally load balancing can be enabled to assign to members of a group. There are two types of load balancing algorithms that define how an exam in assigned

- Assign to each group/shift member evenly. Assignment engine will assign exams to each group or shift member evenly and sequentially.
- Assign to each group/shift member by RVU target. Assignment engine will keep RVUs balanced across users. RVUs target can be set in User Management and Shift Management

Exam Type Definition

Exam - Procedure, Reason, Priority, Modality,CPT Code, Subspecialty
Enterprise - Location, Site
Patient - Gender, Age
Personnel - Resident, Tech, Attending, Ordering, Ordering Group
Report Personnel - Search current report or report history by Personnel or Personnel Type: Ex: Assign exam read by ResidentA to RadiologistX

SLA Management

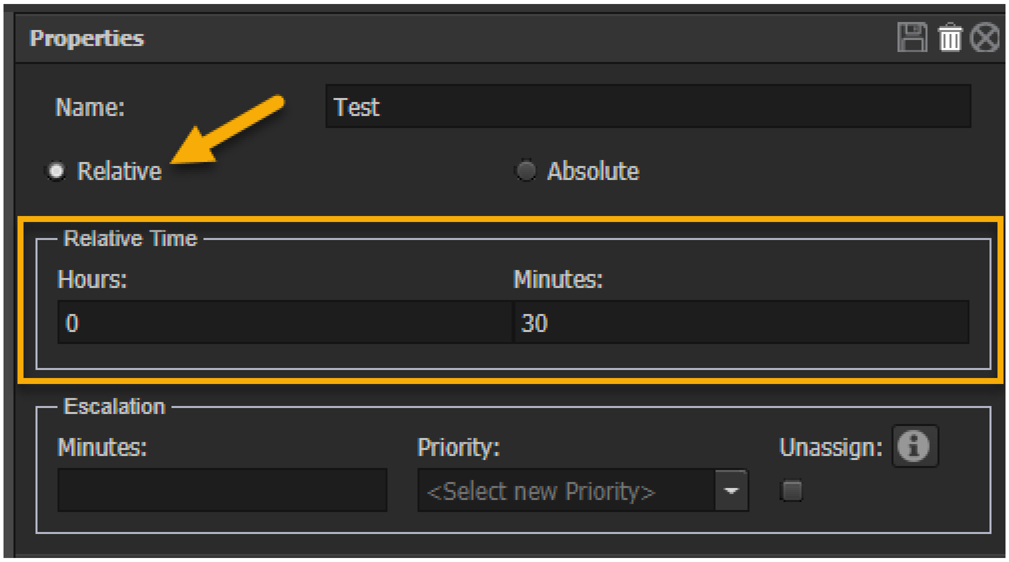
Clario can be set up to help manage your service level agreement (SLA) targets and display the time remaining until SLA is met on the worklist for the radiologist.

How to create an SLA Rule

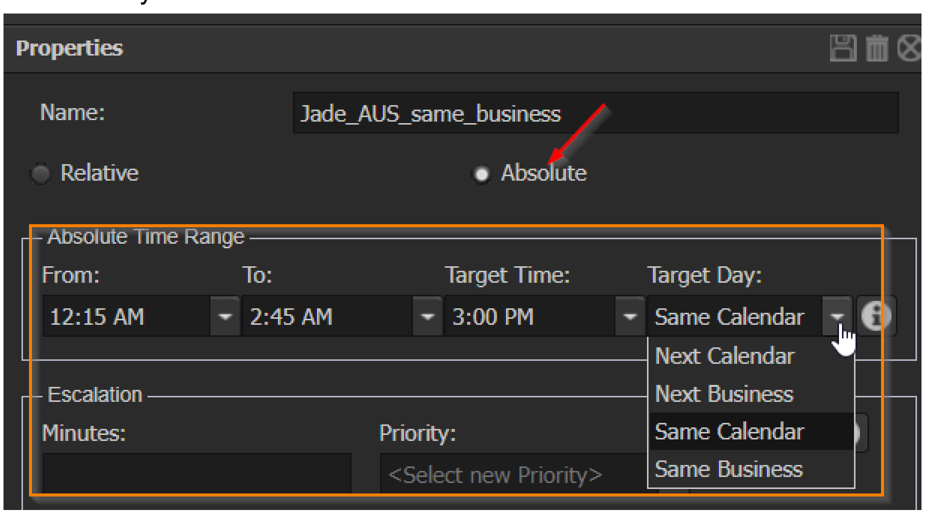
Click the Add New Rule icon in the top right corner of the SLA Rules panel

Enter a name and Select Relative or Absolute.

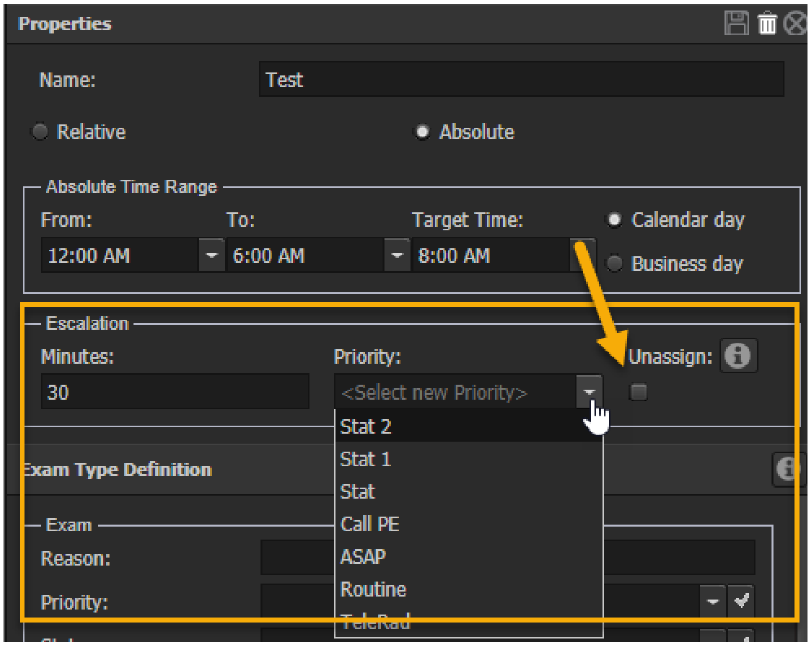
Relative SLA will set the target completion time relative to the time the exam becomes available to read (e.g., moves to an ‘Unread’ status). For example, you might have an agreement that all STAT exams must be read within 30 minutes.



If **Absolute,** there are 4 options, Next calendar day, Next business day, Same calendar day or Same business day to assist in setting the Absolute Time Range and the Target Time.
For example, you might have an agreement that all exams received between midnight and 6am must be read by 8am of the same day.

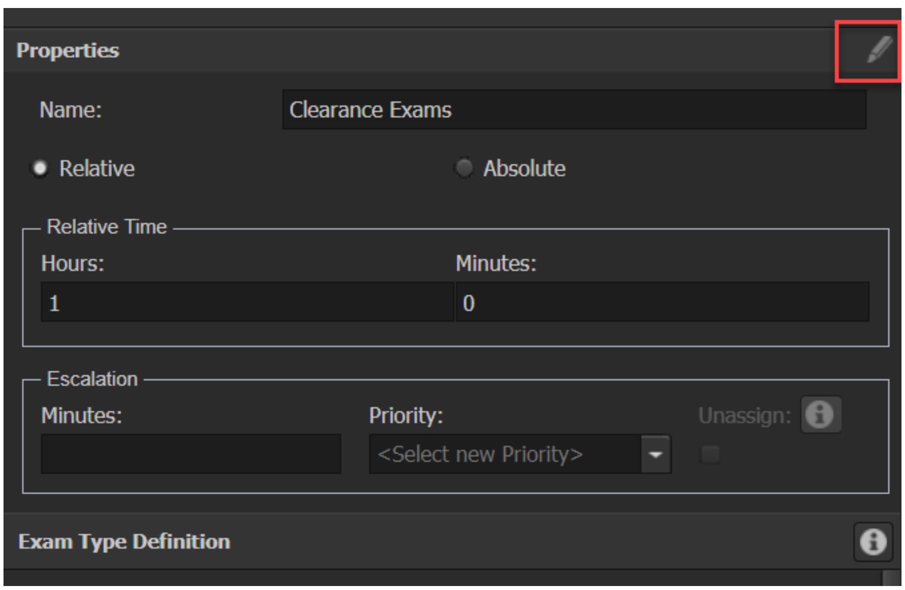


Optionally, set an Escalation
Enter the Minutes. For example, if you enter 30 minutes then when there are 30 minutes left on the exam the priority will be escalated
Enter the Priority to escalate the exam to
Check the Unassign box to unassign the exam from a user or group so it can be read by someone else



How to edit an SLA Rule

In order to edit an SLA, select the specific SLA Rule from the module
Once it is highlighted, select the pencil icon on the far right



Perform desired edits.
Click the Save icon in the top right corner of the Properties panel.

Notification Management

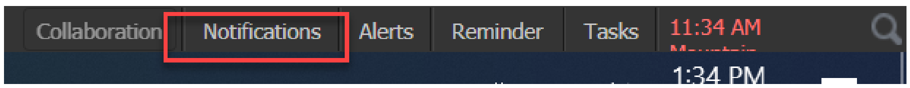
Notification vs Alert

A notification can be used in less urgent scenarios as it does not disrupt workflow. For instance- Cookies in the break room should be sent via notification.

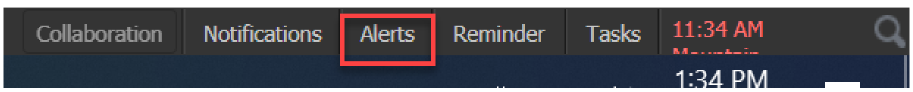
An alert is of a more urgent nature and will disrupt the workflow of end users. This should be used in the instance of STAT OR Read needed for room 20.

How to create a Notification or Alert

To create a notification- users will need to select the word ‘notification’ along the bottom of their worklist



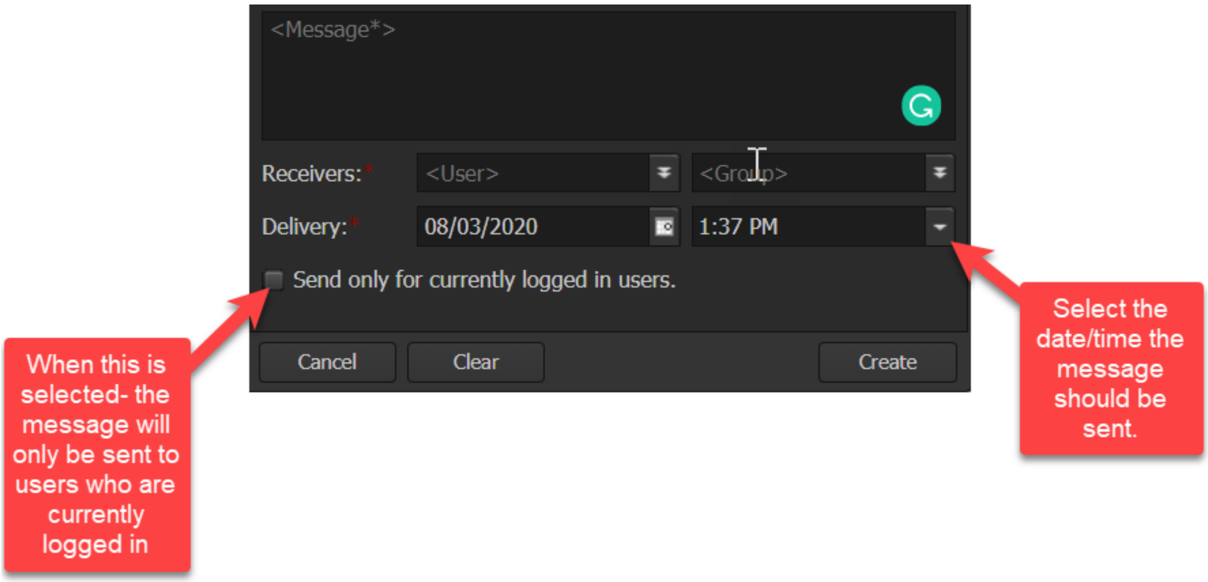
To create an alert- users will need to select the word ‘alert’ along the bottom of their worklists



Once either word has been selected, a new popup will display in which users may type in the information they are wishing to get out to the end users.

Properties Overview

Both notifications and alerts will open a message box like the one displayed below.
<u>Message-</u> Type in the message being sent to end users, ‘Cookies in the break room’
<u>Receivers-</u> Select a specific user or a group of users by using the drop down menu
<u>Delivery-</u> Select the date and time the message should be sent



worklist

Configuration

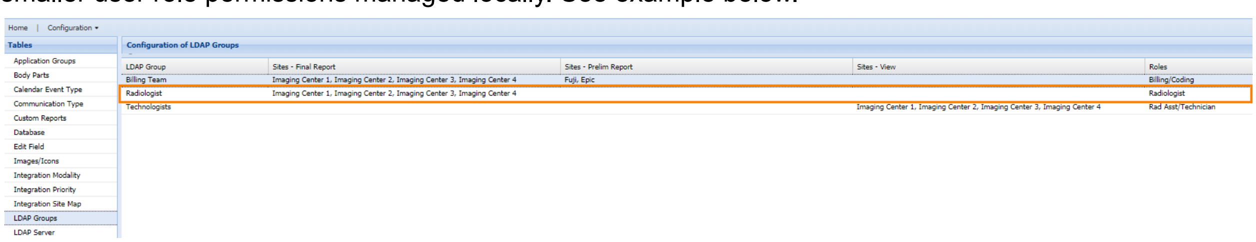
The Sub-Module “Configuration” is found in the Management section of the Clario SmartWorklist. Many of the modules within the SmartWorklist are configured in this section.

Active Directory

LDAP Groups

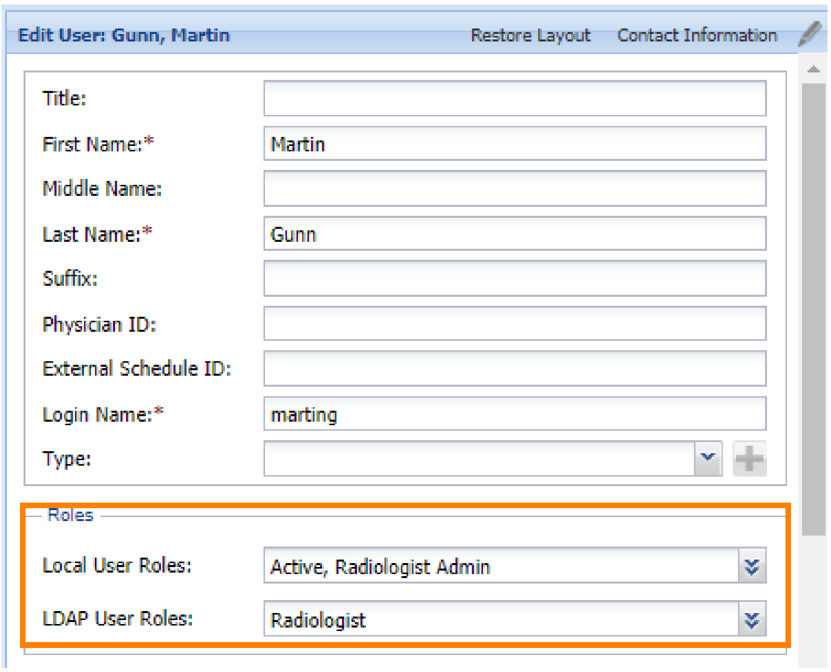
Within a customer’s LDAP Domain Server, user groups can be created. These groups can then be added to the Clario UI so User Roles and/or Site Credentialing can easily be managed at a group level instead of an individual user level.

For example, an IT group could be created in LDAP. Within Clario, you can give the IT group their user role permissions at once (ex: System Admin), without the need to edit each individual user's profile. Clario recommends managing the main user roles and permissions through LDAP groups, but keep the smaller user role permissions managed locally. See example below.



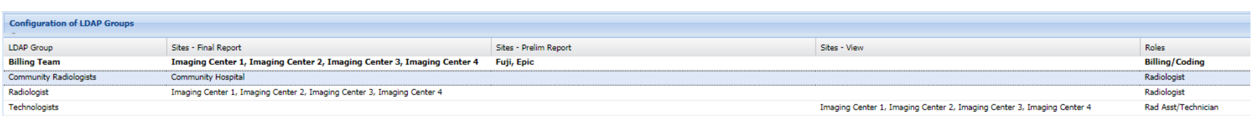
In this example, all users in the Radiologist LDAP group will be given the Radiologist user role.

In addition to having the "Radiologist" user role, in Clario User Management, you have the option to also give "local user roles". As discussed previously, this is recommended for additional permissions such as Radiologist Admin or Peer Review.



User Gunn, Martin will now have all Radiologist and Radiologist Admin permissions.

Optionally, customers can also manage Site Credentialing at a LDAP Group level. In the example below, a Community Radiologist LDAP Group was created. All users within this group will be credentialed at Community Hospital and receive the Radiologist user role.



Configuration of LDAP Groups

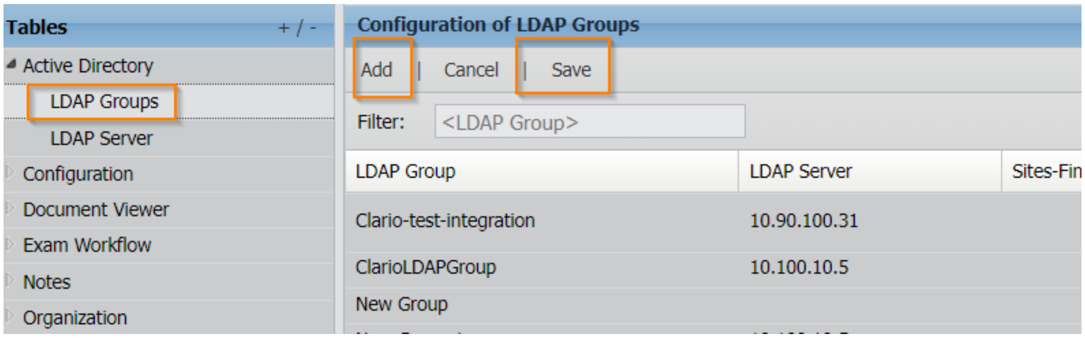
LDAP Group	Sites - Final Report	Sites - Prelim Report	Sites - View	Roles
Billing Team	**Imaging Center 1, Imaging Center 2, Imaging Center 3, Imaging Center 4**	**Fuji, Epic**		**Billing/Coding**
Community Radiologists	Community Hospital			Radiologist
Radiologist	Imaging Center 1, Imaging Center 2, Imaging Center 3, Imaging Center 4			Radiologist
Technologists			Imaging Center 1, Imaging Center 2, Imaging Center 3, Imaging Center 4	Rad Asst/Technician

Configuring LDAP Groups:

Select "Add"

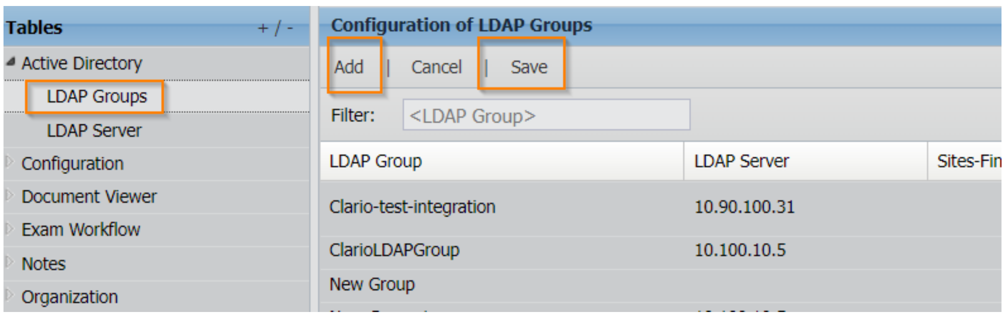
LDAP Groups configured in Clario need to match exactly to the group names in the LDAP Domain Server

When finished selecting the appropriate configurations for the LDAP Group, hit "Save"



LDAP Server

The LDAP Server configuration page is where your LDAP Domain Server is configured within Clario. This is configured by Clario Service and can be edited by the customer. The Domain Server is the "parent" where all of your LDAP users are managed.



Configuration

Body Parts

Body Parts are configured in the system by default. These are only really important if a customer is using Clario Reporting. This configuration allows you to narrow templates down per procedure/body part

Credentialing

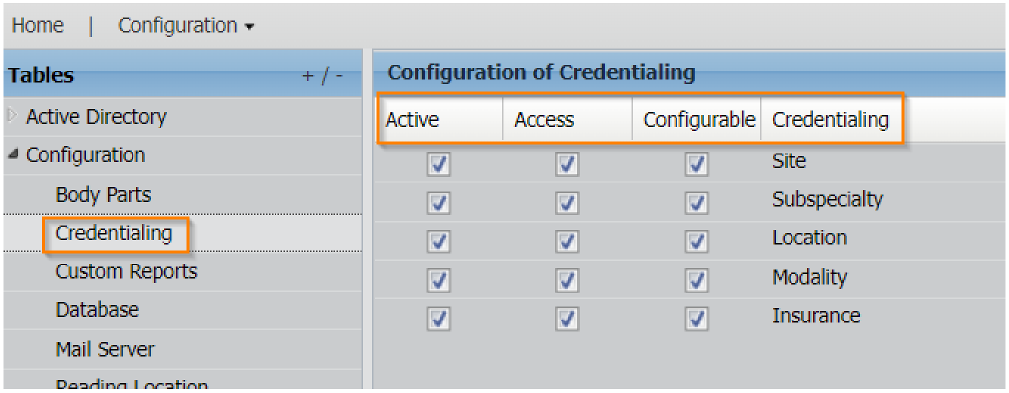
This is where the credentialing module is configured to give certain user permissions.

There are three phases to the credentialing configuration:

Configurable: where you configure the credentialing piece

Access: where you credential the users with "access" to the specific sites/ subspecialty groups/ location, etc. but the credentialing rule is not active in this phase, thus the rule does not apply.

Active: Once configuration and access phases are complete, you are able to make the credentialing rule active.



For more information on Credentialing, see the “Management> User Credentialing” section of this guide.

Custom Reports

Custom reports can be created by Clario Service. This section is not manageable by the client.

Database

Used by the Clario service team only. This section is not manageable by the client. Name formatting and the “Stop SLA Time Remaining Clock” are configured in this section.

Mail Server

This is configured by the Clario Service Technical Team.

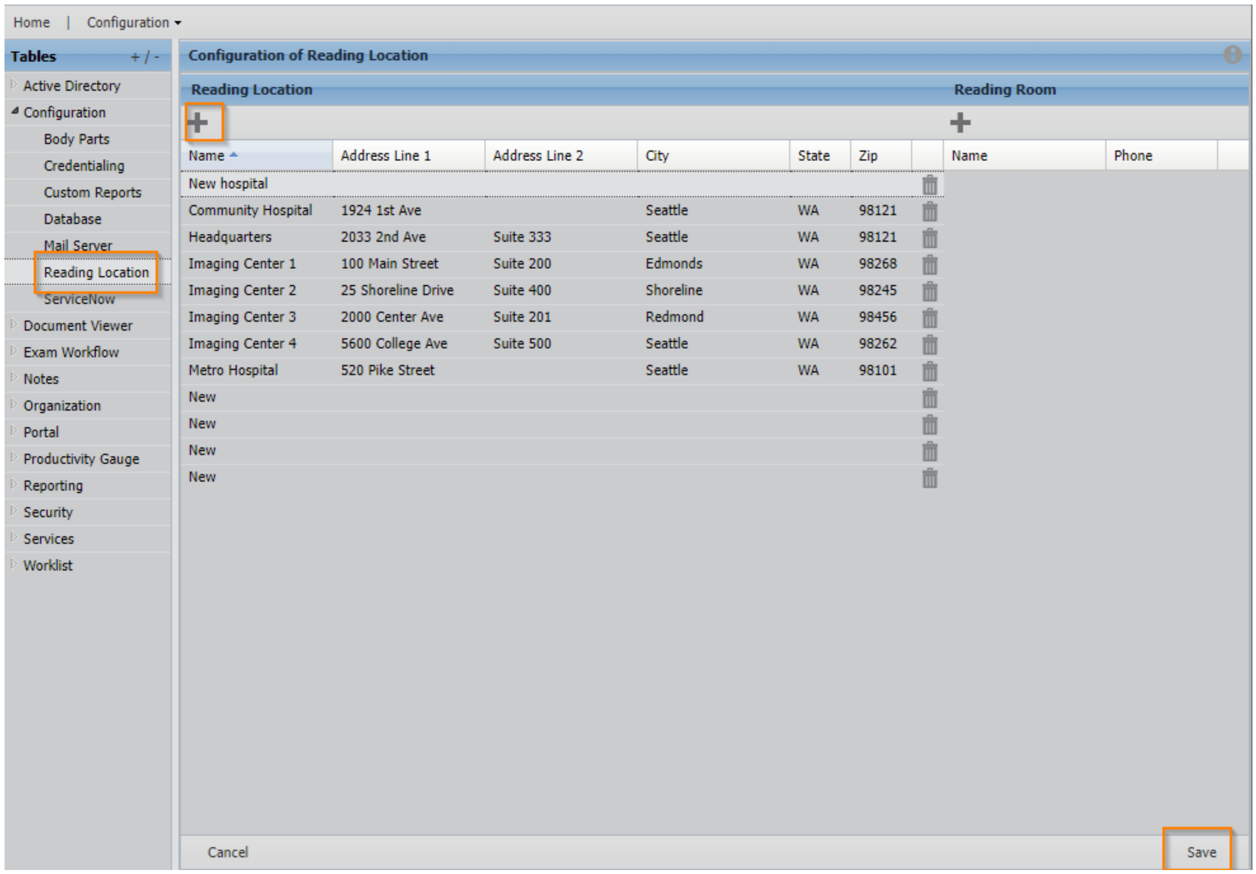
Reading Location

You can configure your Clario worklist to either automatically detect reading location or prompt the radiologist to select reading location.

How to Configure Reading Locations

1. To add a reading location, click the "+" icon below the Reading Location heading
    1. A new row will be added with the name, "New"
    2. Change the name and optionally enter location address

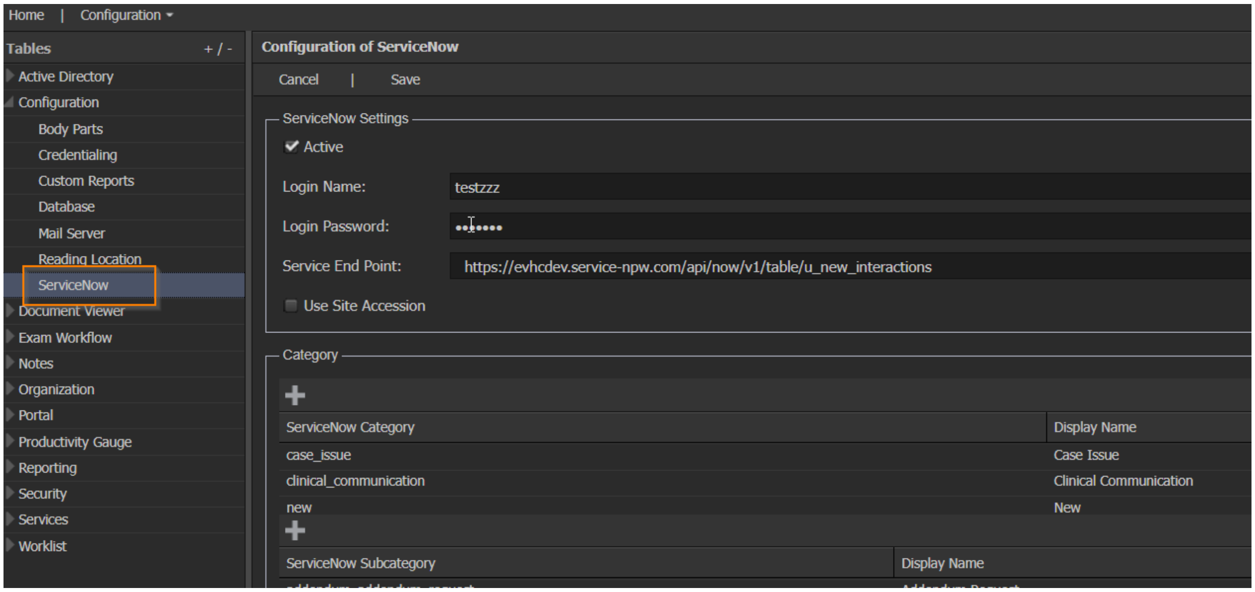
2. With a location selected, click the "+" icon below the Reading Room heading
    1. A new row will be added with the name, "New"
    2. Change the name and optionally enter location phone number
3. Click 'Save' in the bottom right corner of the page. - Note: If no save/cancel button on the page is visible, open window further.It should appear



Service Now

Clario is able to integrate with Service Now to create support tickets. See the attached link to the documentation to assist in configuring this in your system.

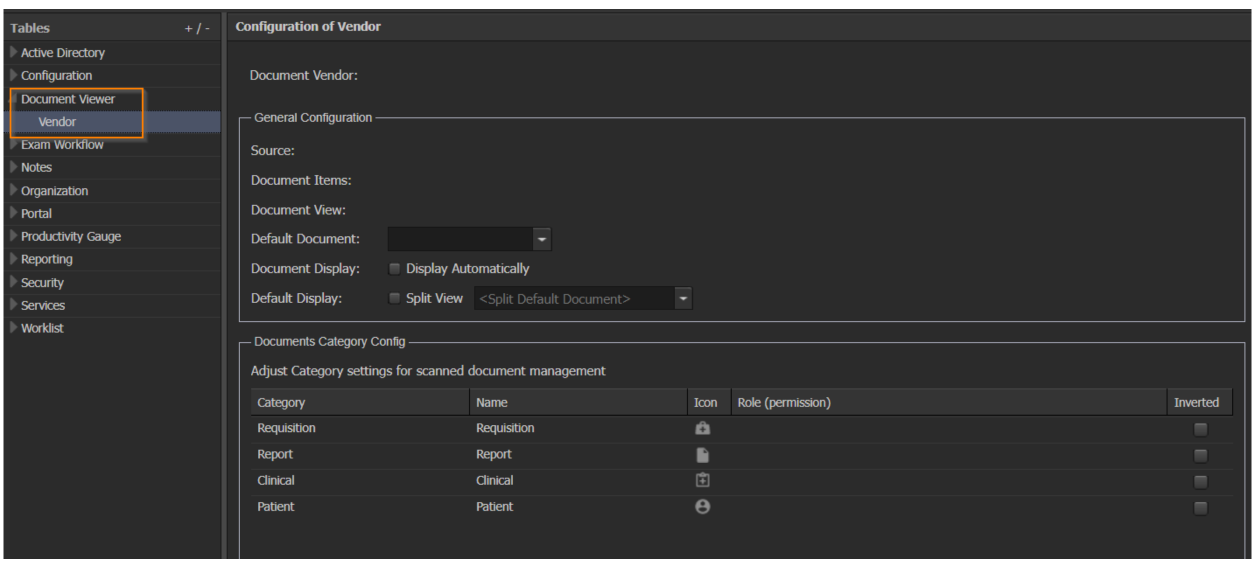
[Service Now Documentation]



Document Viewer

Vendor

Clario is able to connect to 3rd party vendors for document scans



Exam workflow

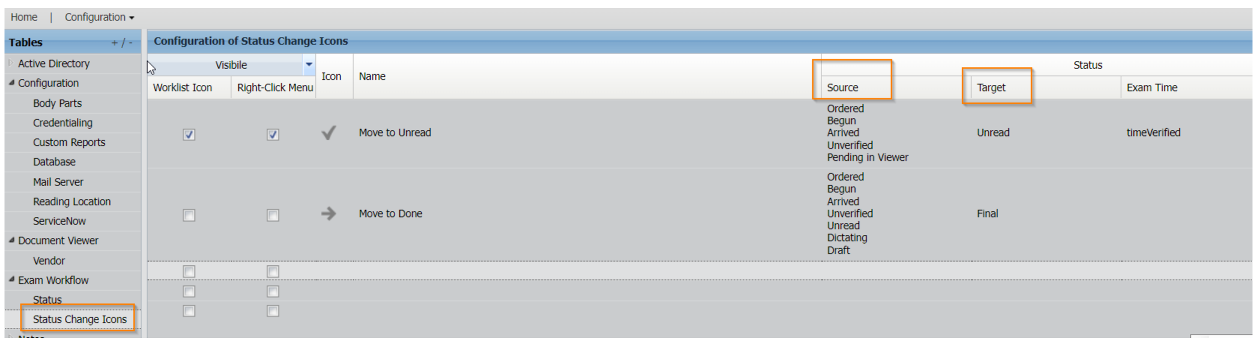
Status

This page should only be edited with the guidance of a Clario Technical Resource. Changing any fields on this page can result in the entire worklist page breaking as well as the entire radiologist workflow. This part of the configuration module allows the user to configure actions that can be taken when an exam is a specific status.

Status change icons

Customers often need a manual solution for status change workflow within Clario. Configuring the Status Change Icon allows the customer to incorporate an updated "unread" timestamp within the workflow when utilized as opposed to "right clicking" and changing the status which will not update the timestamp accordingly.

For Complete Configuration, please contact Clario Customer Service.

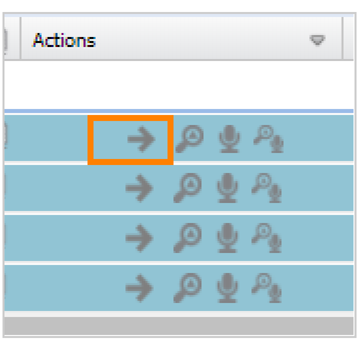


Source - indicates the status the exam is currently in to allow for the status change
Target indicates the status the exam will change to when the status change icon is selected.

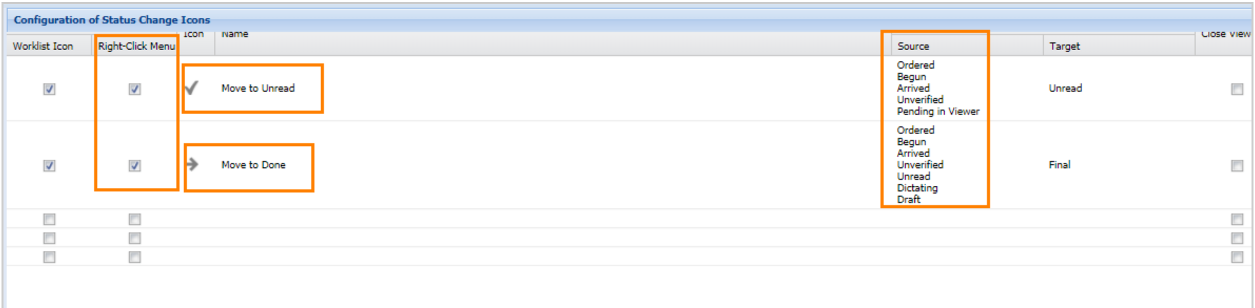
The customer is able to identify whether the icon will be accessible via the worklist and/or the right click menu by selecting the corresponding boxes.

When the worklist icon is selected, and the exam is in the status (source) allowing for the status change, the icon will appear in the "Actions" column of the worklist.

Actions Column in the worklist shows the "Move to Done" Icon. The Icon will also appear in the Actions Column in Patient View when "Worklist Icon" is enabled.



When the Right-Click Menu icon is selected, and the exam is in the status (source) allowing for the status change, the icon will appear in the right click menu for the user (see below)



"Move to Done" Icon is visible in the "Right-Click Menu" for the user.

Selecting "Close Viewer" will close the integrated viewer when the status change icon button is selected for the exam.

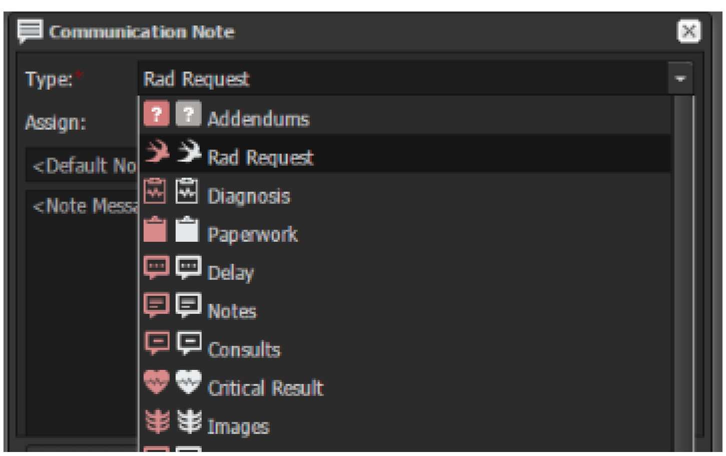
To save any changes made to this configuration page, the "Save" button is located in the bottom right of the screen.

Notes

In this section, you are able to configure the different default note types within the Clario SmartWorklist application. Note Types are not able to be deleted, however you can activate and deactivate them. You can also configure the Note Types to be available as a Single Click option in the Patient View area of the Worklist.

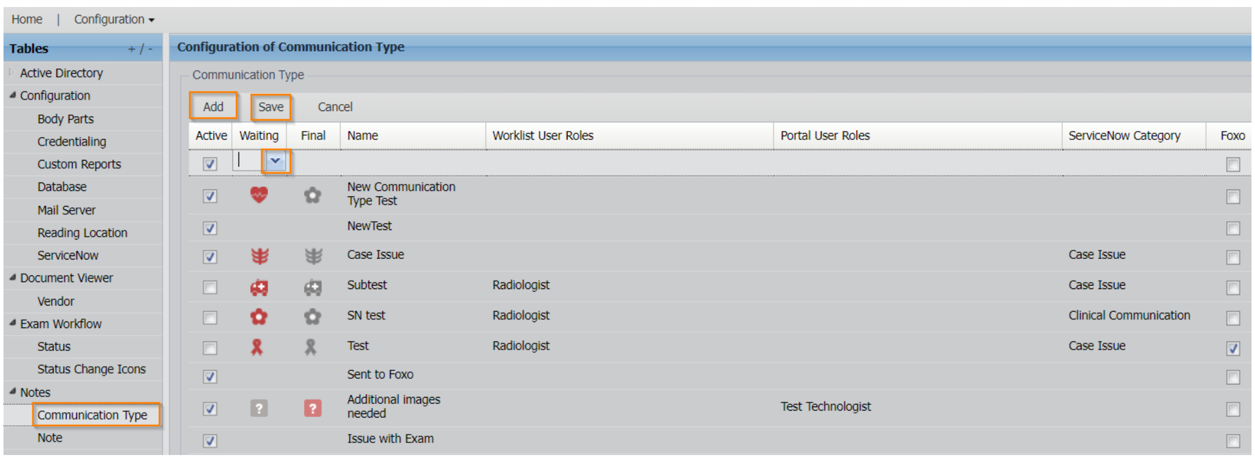
Communication Type

Communication Note Types can be defined for users to select from when adding a Communication Note to an exam

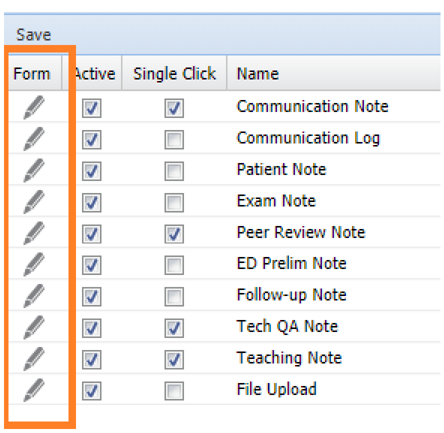


Users have the option to add new Communication Types or edit the names of existing Communication Types.

1. To add a new Communication Type, select "Add". A new row will be added to the table for the user to add a new Communication Type.
2. Enter the Communication Type Name and select Save.
3. Users can select icons for each Communication Type by selecting the space in the "Waiting" and "Final" columns.
    a. Waiting means the note is waiting to be completed, so the icon will be red.
    b. Final means the note is completed, so the icon will be gray
4. Users can deactivate Communication Note Types by unchecking the "Active" box. You cannot delete a communication note type.
5. You can limit Communication Types by User Role. To do this, select the Worklist User Roles and Portal User Roles that should have access to each Communication Type.

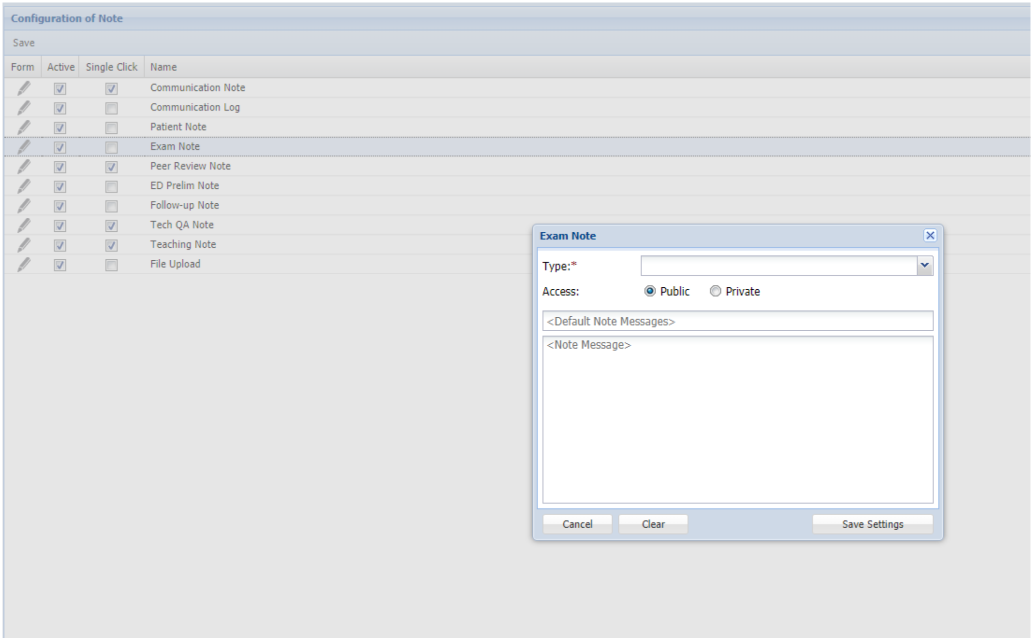


As noted in the image below, only some of the Notes are marked active.

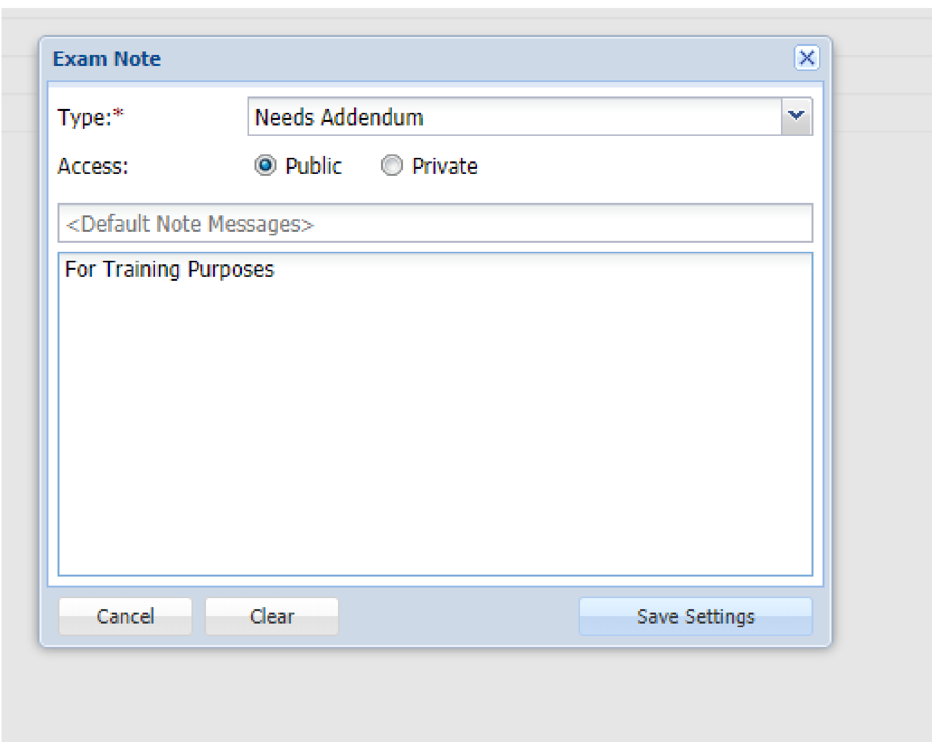


By selecting the Pencil Icon, we are able to configure the default Note that will appear in the worklist when a user selects that particular note.

For instance, in the below example, we will configure the default note for the Exam Note. Selecting the Pencil Icon to the left of Exam Note, a Pop Out window appears displaying the Exam Note default.



In this example, the default Type select for Exam Note is now configured to “Needs Addendum” The Default Note Message will read “For Training Purposes”. Selecting “Save Settings” will commit the changes to reflect in the worklist.

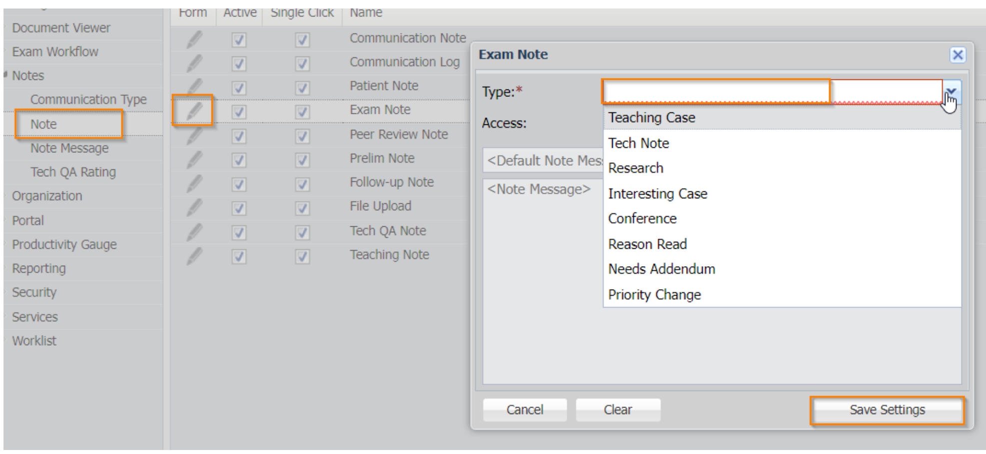


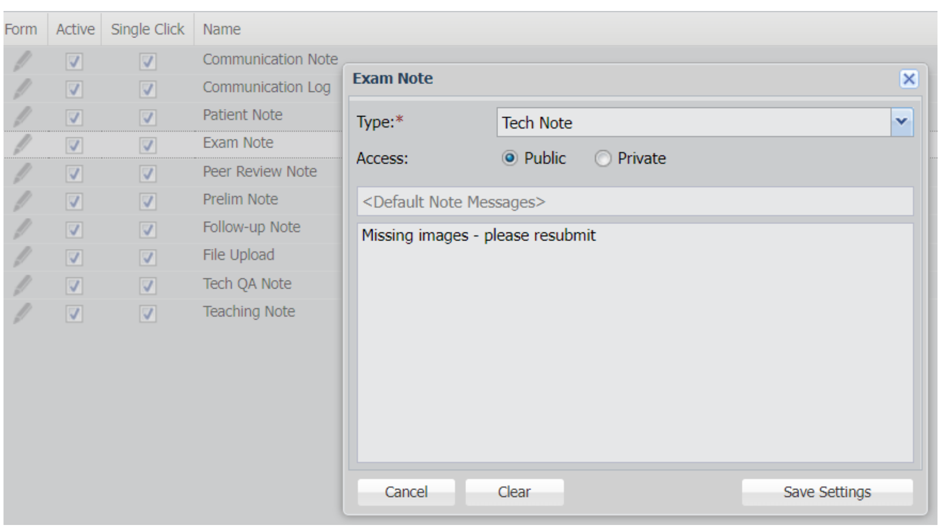
Single Click

Notice in the image all Note Types are selected for Single Click. This functionality is useful for radiology workflow in that it allows the radiologist to quickly add that note type to an exam without having to select the "Create" Button. If Single Click is selected on this configuration page for a Note Type, the user will be able to select the icon associated with the Note Type with a "single click" rather than having to select create and then selecting the note type from a drop down.

Default Note Types

By selecting the Pencil Icon, we are able to configure the default Note that will appear in the worklist when a user selects that particular note.
For instance, in the below example, we will configure the default note for the Exam Note. Selecting the Pencil Icon to the left of Exam Note, a Pop Out window appears displaying the Exam Note default.





In this example, the default Type select for Exam Note is now configured to “Missing images” Selecting “Save Settings” will commit the changes to reflect in the worklist.

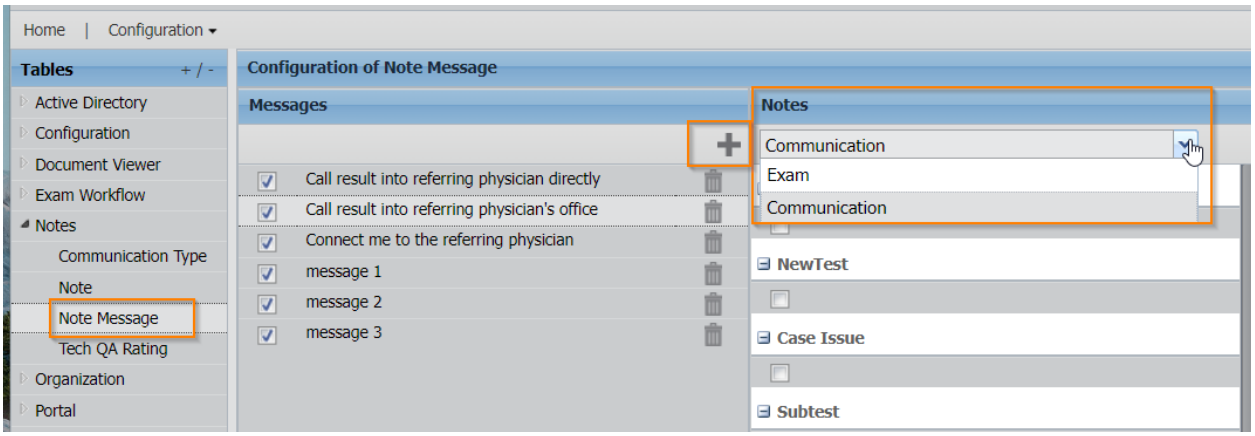
Back on the worklist page, after refreshing the worklist, selecting the “Exam Note” displays the default configuration settings that were set up on the Configuration Page.

If at any time the need arises to clear out the configuration default settings this can be done by selecting “clear” and then saving the settings.

Note message

Communication and Exam Notes can be configured to have "canned" responses or "note messages" for each Communication Type.

In the Notes panel, select Communication or Exam to define Note Messages for each type of note.



Users have the option to add a new Note Message or edit an existing note message.
To add a new Note Message select the plus icon in the Messages panel.

To edit an existing Note Message simply click on the text and type the new message.

Users can add the Note Messages to the selected Note Type by dragging and dropping the Note Message to the Note Type.

When finished, select "Save" in the bottom right hand corner of the page.
See below for an example of how the Note Message will appear in the Communication Note window.

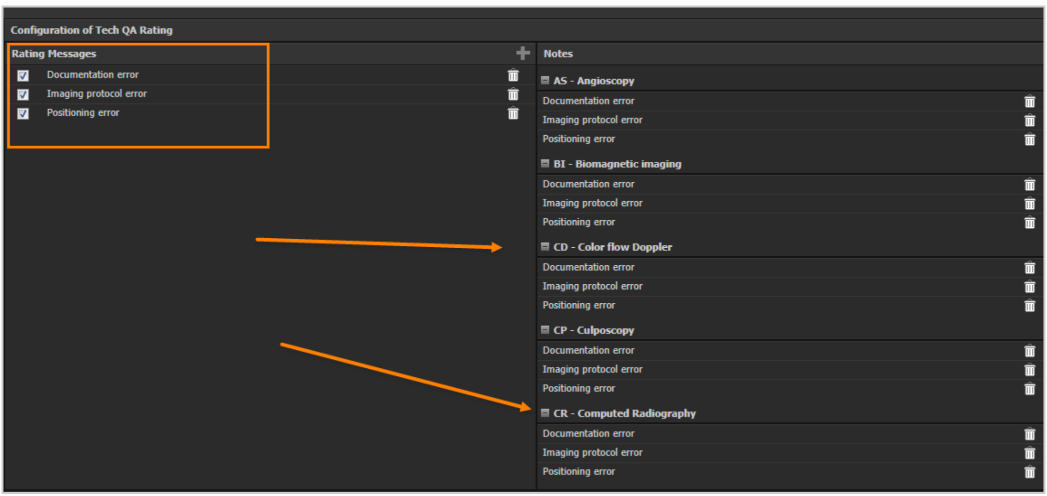
Tech QA rating

Tech QA Notes can be utilized to incorporate QA of technologist work into radiology workflow. Ratings are given on the tech and only view-able to admin personnel who have been granted user role permission to see the Tech QA Notes.

Added a new admin permission for Tech QA notes in version 4.2.

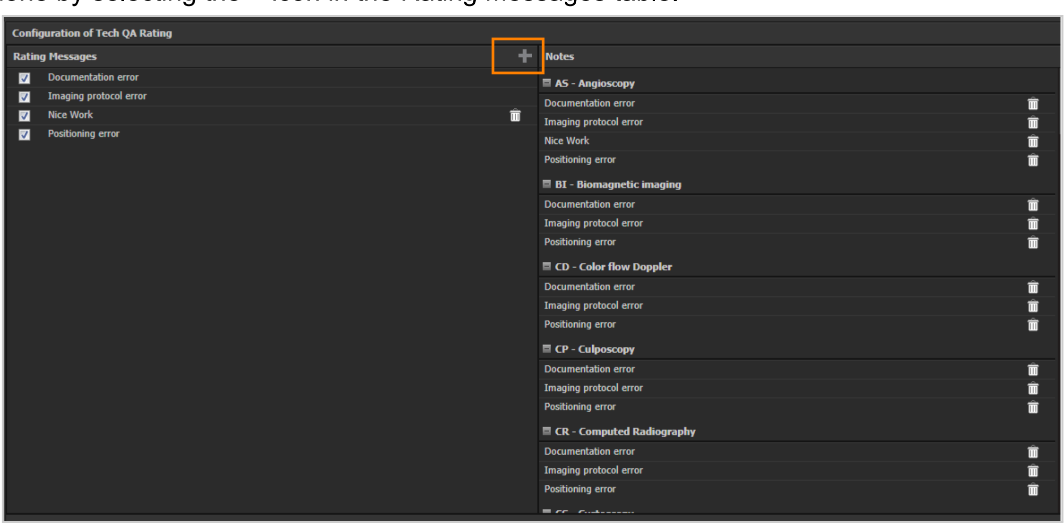
Tech QA Ratings are configured in Management > Notes > Configuration.

Each Modality is configured with its own set of Tech QA Ratings.



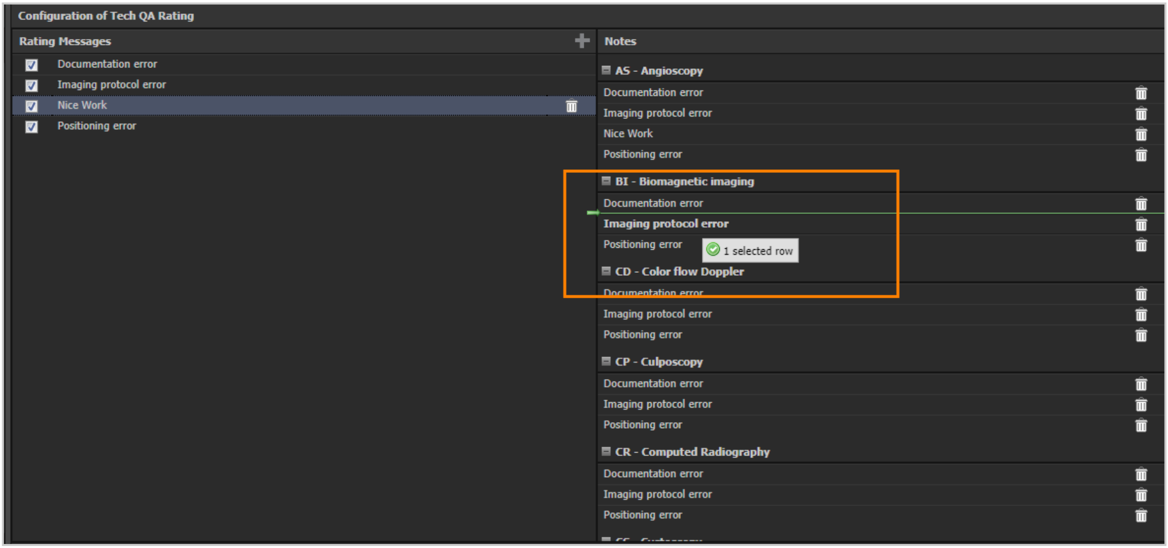
The picture above shows the Configuration page for Tech QA Ratings in Management > Configuration > Notes > Tech QA Rating.   The rating messages are added on the left, and then enabled on the right for each modality. Each modality can essentially have a different set of Tech QA Rating Messages.

To add a Tech QA Rating Message to a modality, one must first add it to the Rating Messages list. This is done by selecting the + icon in the Rating Messages table.



A checkbox next to the Rating Message indicates an Active Rating Message. To remove a rating message, simply select the trash can icon.

To add a Rating Message to a Modality, simply drag and drop the Rating Message below the Modality table on the left side. A green check box will appear when successfully added to the Modality. In the picture below, "Nice Work" was dragged, dropped and added successfully to the Modality "BI Biomagnetic imaging".



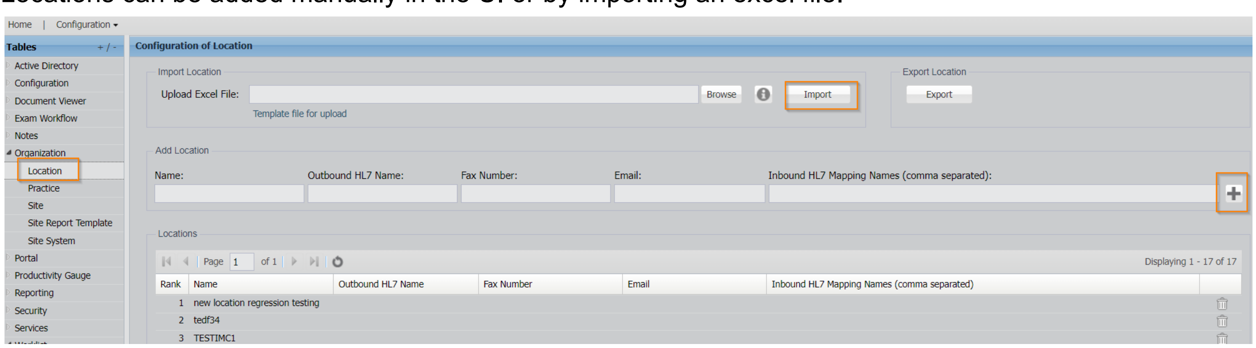
The Tech QA Ratings can then be used in the Tech QA Notes workflow.

Organization

Location

How to add a location

Locations can be added manually in the UI or by importing an excel file.

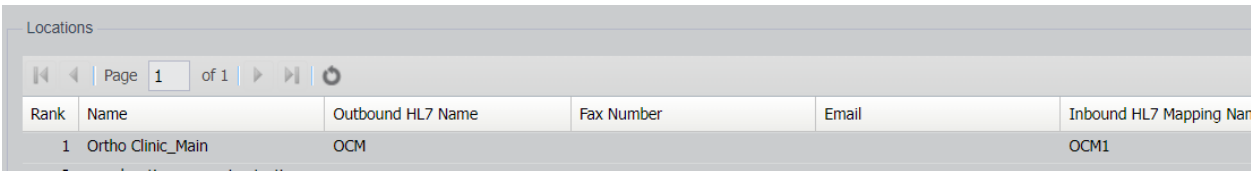


Manual process

Navigate to the Location configuration page and find the "Add Location" panel

1. Enter the Location name
2. Enter the Outbound HL7 Name - This should match at least one of the Inbound HL7 names
3. Optionally enter Fax Number
4. Optionally enter Email
5. Enter the Inbound HL7 Name - More than one can be entered (comma separated)

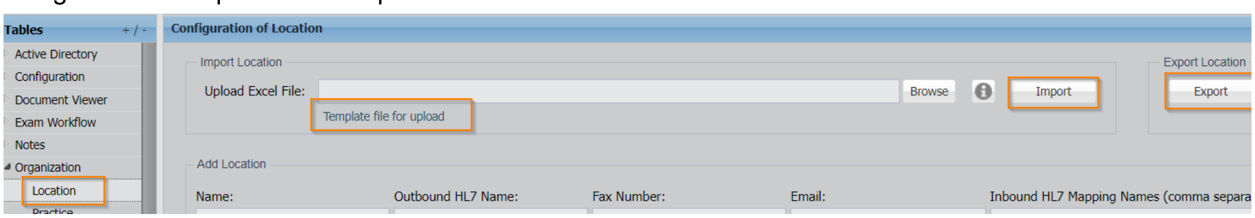
•Note: Whenever Clario receives an inbound message with the information entered in the Inbound HL7 field, it will match to the Location name it's associated with
Example from screenshot above: Clario receives a message with A entered in the Inbound HL7 field. This will be matched to Location name: Location 1



- If the location name Ortho Clinic_Main is selected in the sender, Clario will send the Outbound HL7 name

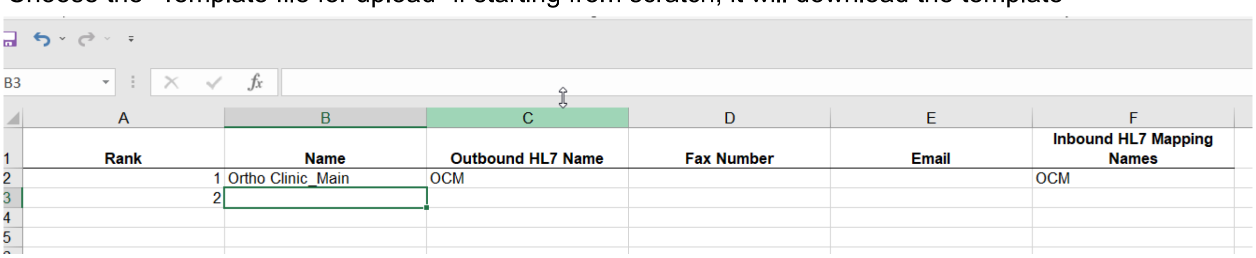
In the Locations table, drag and drop the location to the appropriate Rank. The Rank is the order in which the list will display in the Location drop downs throughout the UI.

Importing Locations
If you have a list of locations that need to be added, it might be quicker to use the import option.
Navigate to the Import Location panel



Choose the export locations option to edit or add to the locations that are already configured

If starting from scratch, enter the information in the fields listed below
Choose the "Template file for upload" if starting from scratch, it will download the template



- Enter all locations, Outbound and Inbound HL7 information
- Navigate back to the "Import Location" panel in the UI
- Choose "Browse" to select your file then Choose "Import"
- The new locations will appear in the Locations panel

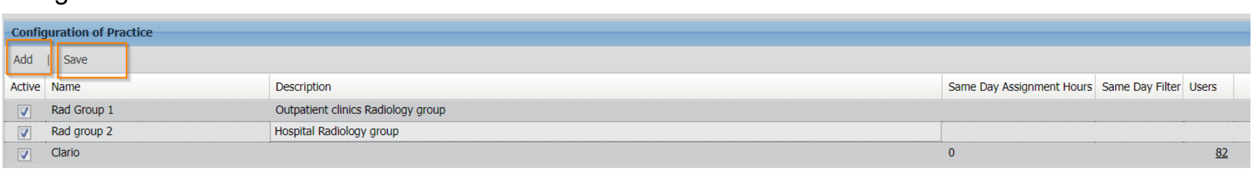
If adding to an existing list of locations

- Export the current locations - Found in the Export Location panel
- Insert new rows into the top of your excel file
- Input the location name, outbound HL7 name and inbound HL7 name
- If you prefer the location drop down list to be alphabetical, sort the "name" column alphabetically
- Delete the numbers in the "Rank" row
- Re-add the rank starting with number 1
- This will update the drop down list to be displayed alphabetically
- Save your file and Import into the UI
- The import can take a few minutes

Practice

Practices are useful when a customer is composed of multi practice groups. Simply put, a practice is a group of people linked to a feature set in Clario. This feature set could be Peer Review, the display of users in chat, worklist groupings, etc. Assigning a user to a practice will identify which feature set the user has access to and how according to how the practice is configured.

Practices are created and configured by the customer in the Configuration section of Clario., selecting Practice from the Configuration List takes the user to the section wherein Practices are created and configured within Clario.



To Add a Practice, simply select the Add button.
A new line item will appear.

Double clicking on the field(s) will allow the user to rename or enter information in the corresponding fields. Ensure to select "Save" when complete.

Practices can not be deleted. However, they can be made inactive by simply unchecking the "Active" box to the left of the practice name.

Ensure to select "Save" when complete to save the changes made.

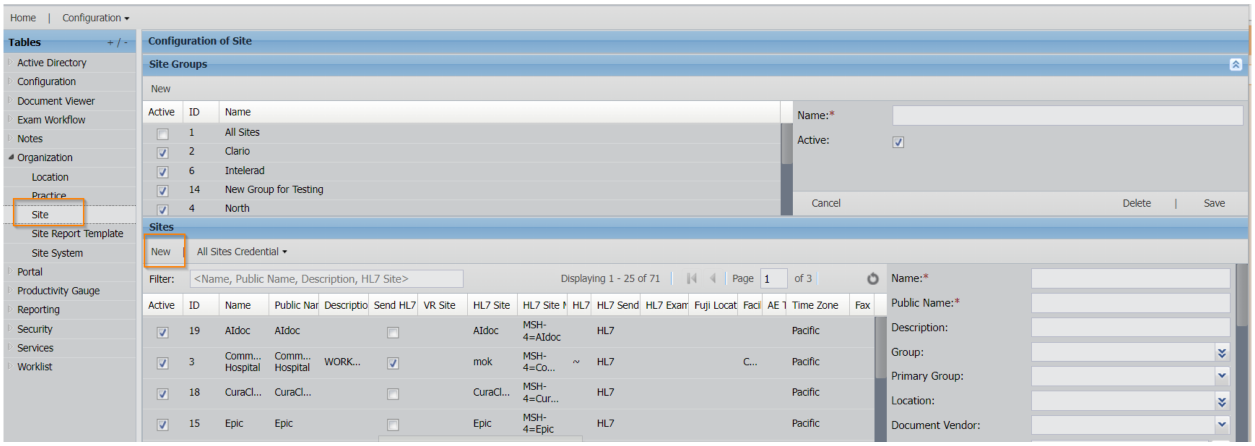
Site

Sites and Site Groups are configured in this section of the application.

How to add a Site in Clario?

1. Configuring Sites in Clario is done in Management > Configuration> Organization> Sites.
2. To add a site simply select "New" midway down the Page under Sites.
3. Your cursor will then move to the table to the right.

4. Fill out the following information: During initial set up Name, HL7 information, and time zone are likely the only information that can be added.



The HL7 box indicates areas needed for ingesting correct HL7 information

Name, Public Name and Time Zone are the **only** mandatory fields

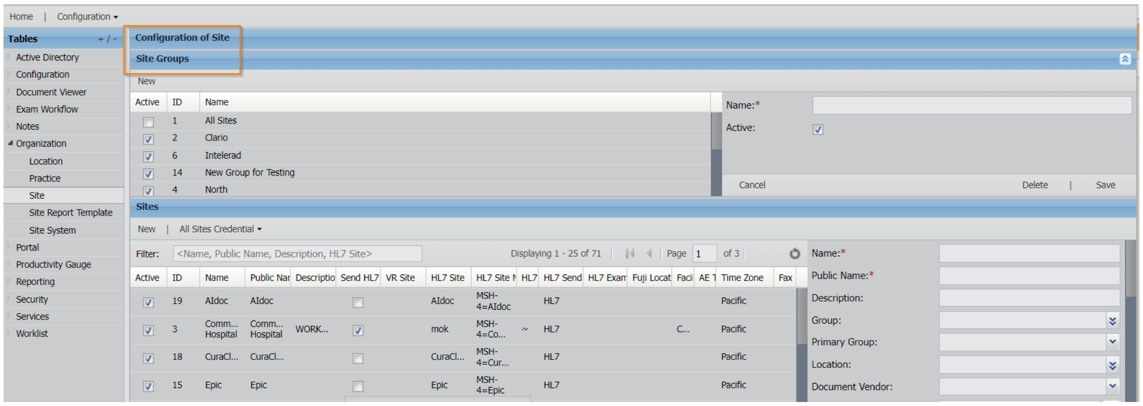
Name:

- Public Name: (users will see this name within in the Site column of the Smart Worklist)
- Group: (Only needed if you are using Site Groups.)
- Description:
- Primary Group: (Only needed if you are using Site Groups.)
- Location: (Only needed if your site is using locations)
- Document Vender:
- ServiceNow Facility ID:
- VR Site:
- HL7 Site: (This is the Site code usually located in MSH 4)
  - Example: FRC or Fairfax
- HL7 Site Map: (MSH-'site code field'='Site Code')
  - Example: MSH-4=FRC or MSH-5=Fairfax
- HL7 Newline:
- LDAP Groups (if these are being used)
- Facility: (used for Peer Review)
- AE Title
- Time Zone:
- Viewer: (Select all viewers in the system that apply to this site.)
- Default Viewer (select Main viewer if multiple were selected for this site.)
- Dictation: (select all dictation systems that apply to this site.)
- Default Dictation: (Select Main dictation system if more than 1 selected for this site.
- Upload Logo: (Add if exporting reports or sending reports from the Clario Smart Worklist. This will appear at the top of the report)
- Active: (leave checked)

Select Save once done adding information.

Site Groups

Site Groups are useful when many sites within the system will require the same configurations or workflows.



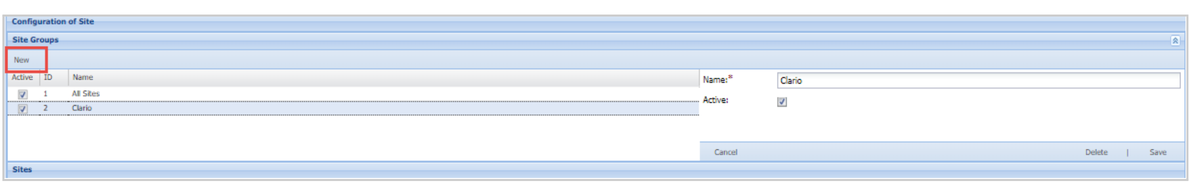
Site Groups are simply a group of sites within the system.

Site Groups are often used in the following ways:

- User Credentialing
  - Grouping sites together for ease of credentialing users rather than credentialing site by site
- Assignment Rules
  - Grouping sites together for ease of creating assignment rules based on certain groups of sites.
- SLA Management
  - Grouping sites together for ease of creating SLA rules based on certain groups of site
- Peer Review
  - Grouping sites together for ease of creating specific Peer Review rules for specific groups of sites.
- Notification management
  - Grouping sites together for ease of sending out notifications or alerts to groups of sites in the system.
- Workload Gauge
  - Site Groups must be configured in order for the Workload Gauge to work.
- Worklist Groups
  - Managing access to worklist Groups

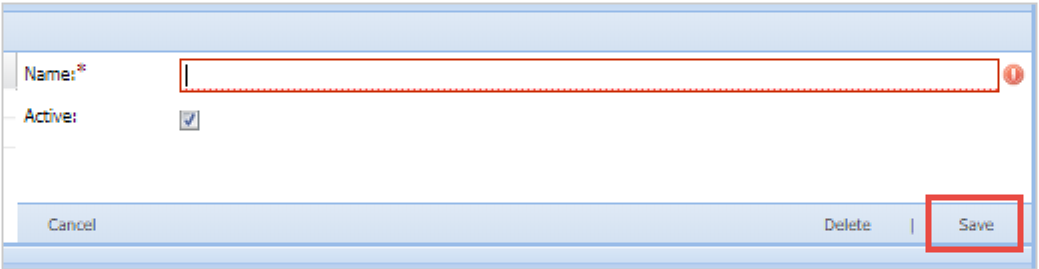
To begin configuring site groups, navigate to Management > Configuration > Organization >Site.

In order to configure site groups, sites must first be configured in the system.

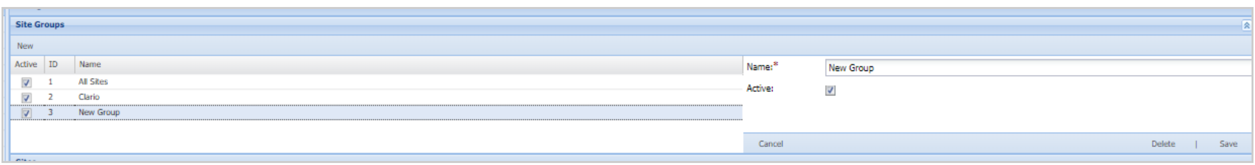


At the top of the page, in the Site Group table, select "New"

Your cursor will move to the right of the page, first prompting you to determine a name for the new Site Group.



Once you determine the name of your new Site Group, and select save, the new Group will appear in the list on the left in the table.



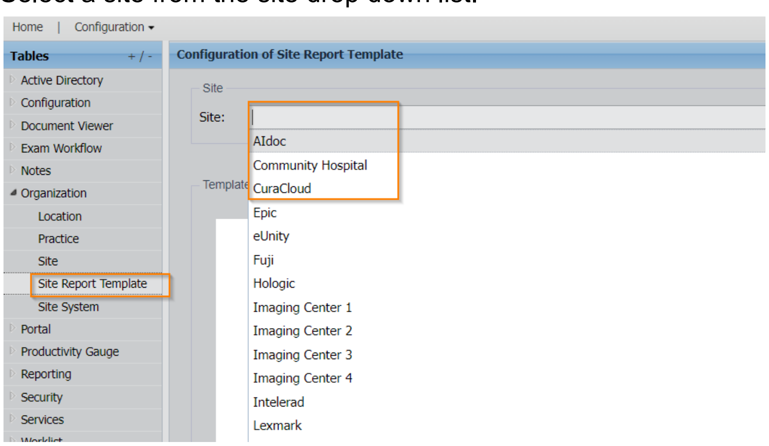
To associate sites with a site group, first select the site from the site list in the table below site groups.
To the left, identify which site group(s) the site should be a part of.
Select Save when complete.

Site Report Template

Clario users can create and modify their own HTML files for report distribution templates.

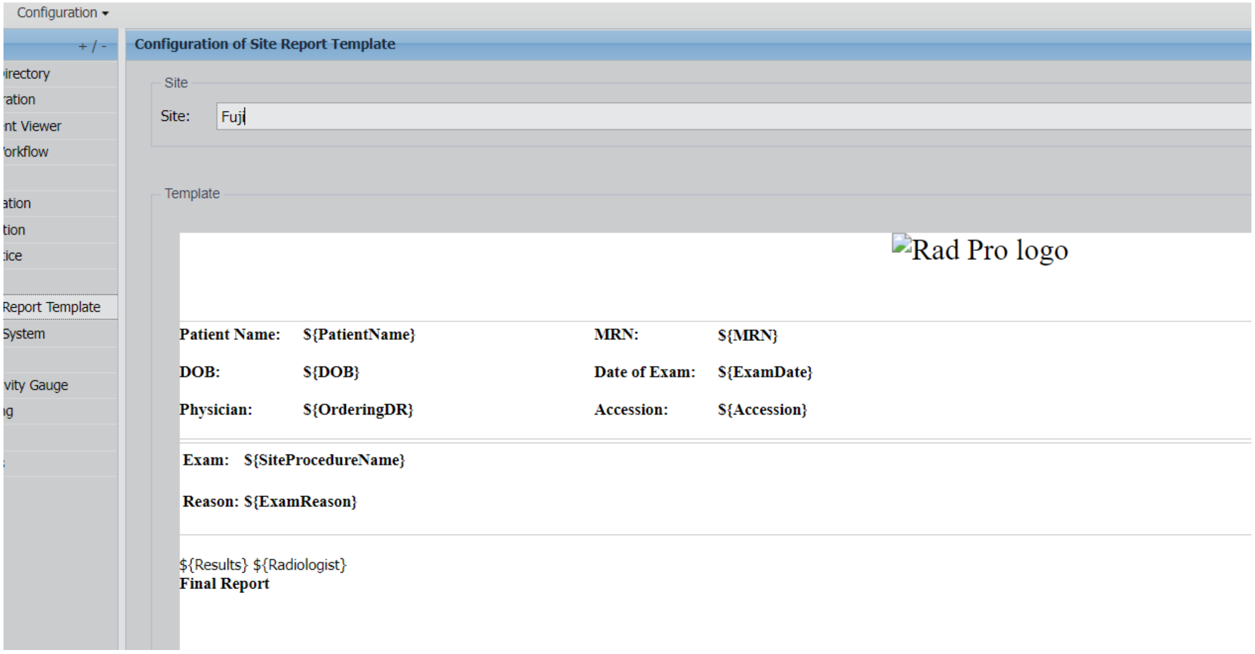
The site groups added to the Site tables are available in this module

Navigate to the Management module → Configuration → Organization → Site Report Template
Select a site from the site drop down list.



Choose Export if you would like to export the current template, modify it and re-upload
Select Upload to upload an HTML file

The report template will appear in the Template window.



Site System

Only relevant if using the “Linq” workflow (two Clario systems connected). This is not a feature Clario is currently utilizing.

Portal

Portal Order Generation
This is configured by Clario Service.

Productivity Gauge

Calendar Event Type

The calendar module is found with the Scheduling Module in the Clario SmartWorklist. The Calendar module can be used to create reminders, give RVU or Work Unit Credit based on different calendar events. The Calendar Events can be imported via the Qgenda integration or created manually.

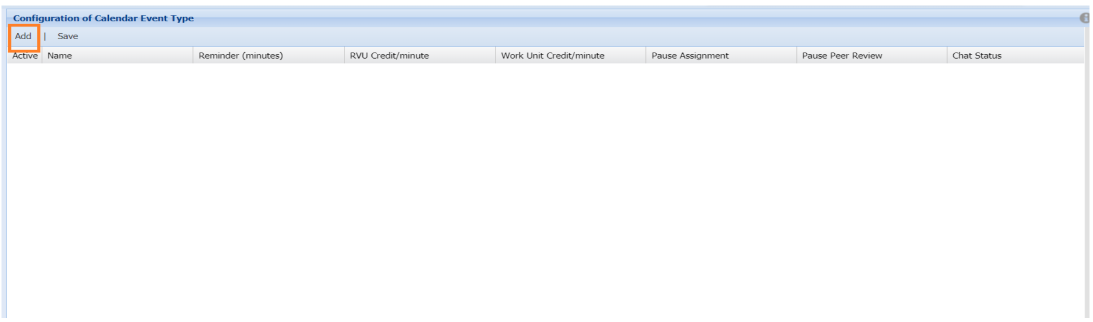
Adding a Calendar Event

In order to proceed with creating a Calendar Event, the Calendar Event Types should be configured in the configuration section of Clario.

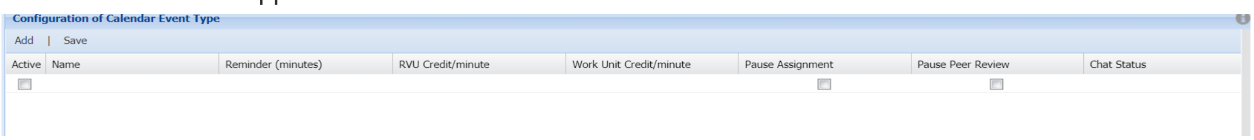
In the Management> Configuration> Calendar Event Type section of Clario, admin level personnel can define different types of Calendar events, and their worth within the system.

- This is where you can pre-define credits and other details for different event types
- If an admin needs to schedule an event for a user, they can select from the predefined list so the user will get the configured credit and settings
- You are not able to delete an event type, but you can rename or make inactive.

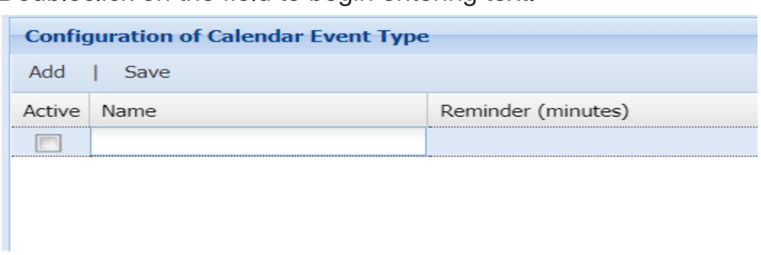
To add a Calendar Event Type in the configuration page, simply select “Add”



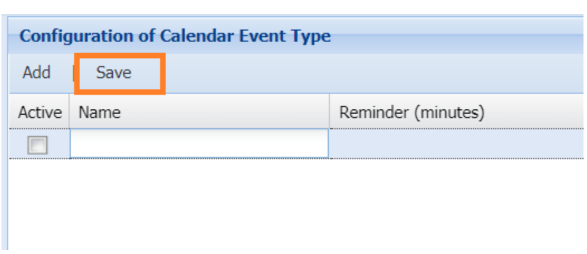
A new blank row will appear.



Doubleclick on the field to begin entering text.



Select save when complete.



Calendar Event Fields Explained

Reminder (minutes): Identify how many minutes before the event you would like the recipients to be reminded.

RVU Credit/minute: Identify how many RVU credits should be given to the recipient per minute.

Work Unit Credit/minute: Identify how many Work Unit credits should be given to the recipient per minute.

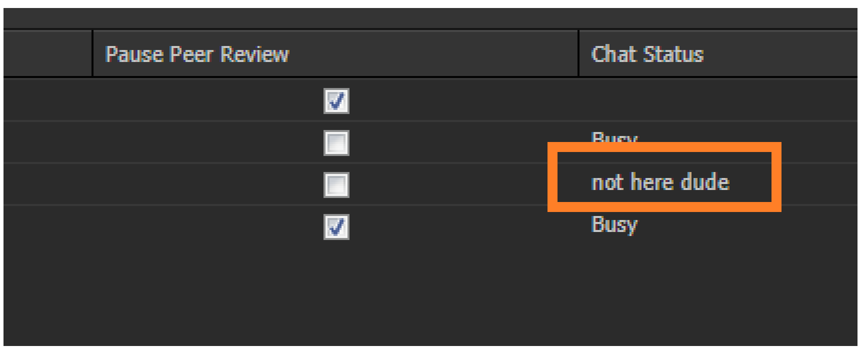
Pausing Assignment/ Pausing Peer Review

If a radiologist is a peer review user or is set up to have exams assigned to him or her via an assignment rule, this feature can be very useful. If the radiologist has a meeting, will be out of the office a day or on vacation for an extended period of time, you can choose to pause exam and/or peer review assignment during that time.

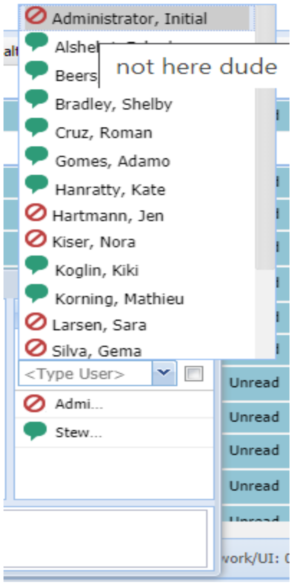
Pause Assignment: If checked, exam assignment will be paused for the recipients while in the event.

Pause Peer Review: If checked, peer review will be paused for the recipients while in the event.

Chat Status: Manually configure the Clario Chat status on the worklist page for the recipient while they are in the event. This can be useful to create a default away message or busy message. For instance in the picture below, the chat status "not here dude" was configured to display for the user when they were in the specific event.



The user is in the specific event in the system, and their chat status on the worklist displays "not here dude"



RVU Task

RVU Task Credit

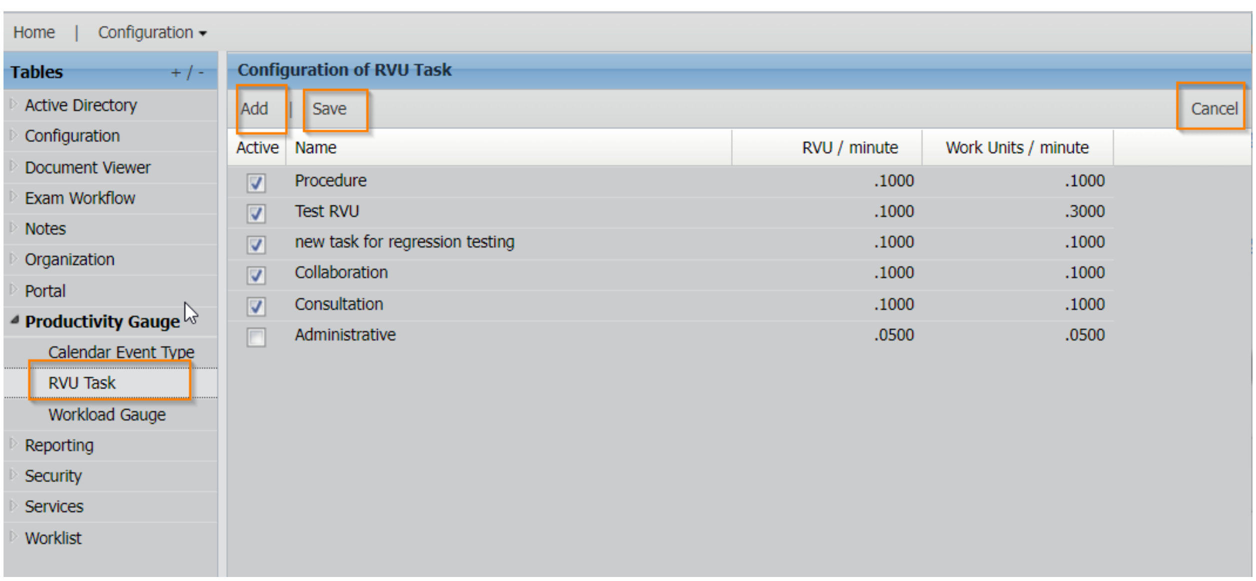
The radiologist has the option to add RVU task credit by selecting a task from a task list that a practice administrator defines.

To create RVU Tasks:

Click Add

Enter a Name and how much RVU credit per minute the user should receive for completing the task.

Click Save.

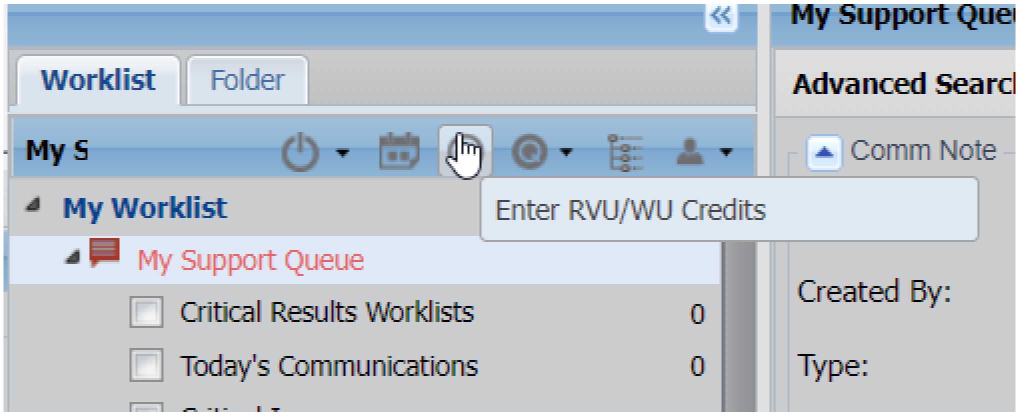


RVU Tasks cannot be deleted, but they can be inactivated by unchecking the Active box next to the task. Once inactive, the Radiologist will no longer have the option to select that task.

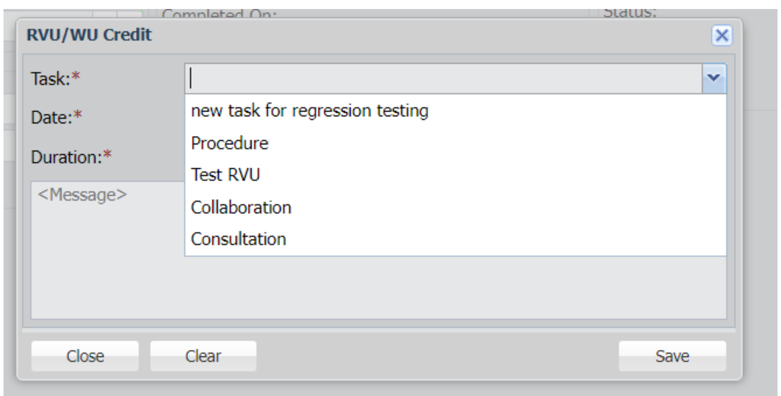
Once you have configured your RVU tasks, you can give radiologists permission to manually add RVU credits. This can be utilized for them to give themselves credit for tasks such as meetings, long procedures, or consultations.

To add RVU credit:

From the work list click the Enter RVU/WU Credits icon.

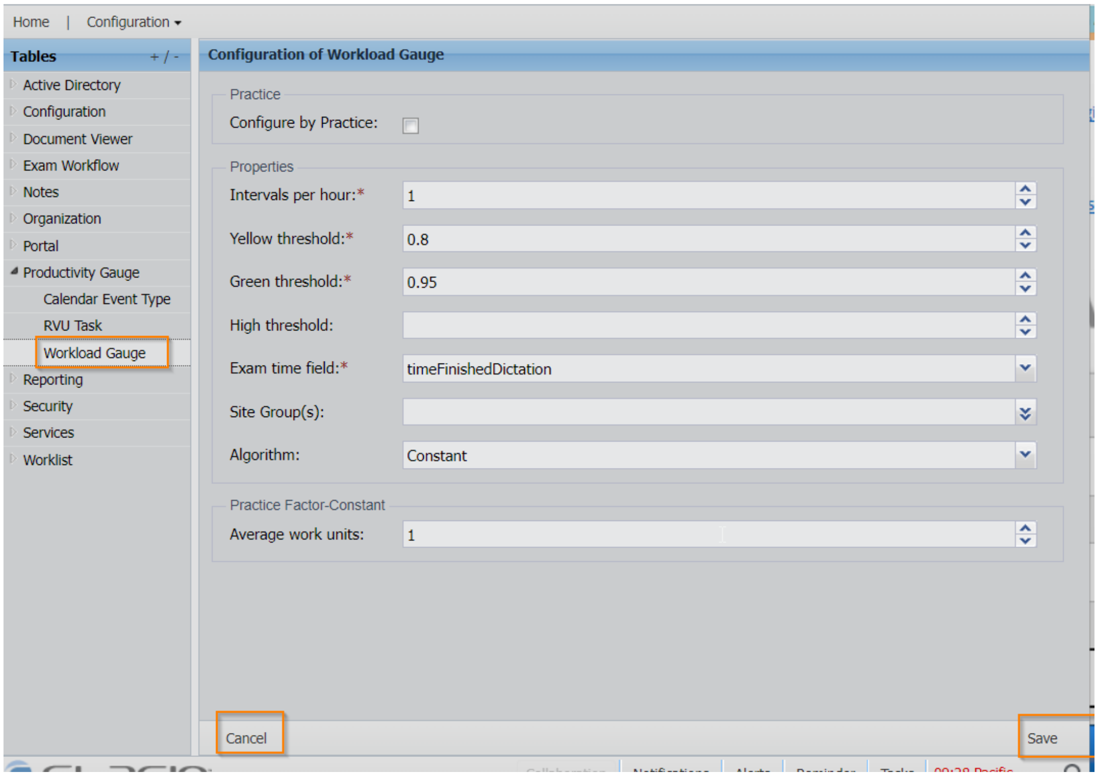


Select a Task from the drop down menu, enter the date and time of the task, and the duration. Click Save.



Workload Gauge

This part of the Configuration Module allows the user to configure the Workload Gauge in Clario. For a better understanding of what the Workload Gauge is, please reach out to your account manager.



The above picture shows the default settings of this page.

Intervals Per Hour means how many intervals periods in 1 hour. The setting of 4 means there are 4 intervals for the hour which equates to 15 minutes (60 minutes divided by 4 intervals is 15 minutes). This can be changed to a different interval setting, but it must be divisible by the 60 min. hour.

Thresholds can be configured to your practice liking as well. This value is based off of the target WVUs set per shift and/or per user.

The default for yellow is set to .8 and green set to .95. Thus when a user gets to .8 WVUs on their shift, their gauge will then turn to yellow. Once they get to .95 the gauge will turn to green.

A high threshold can be set if your practice so chooses. You will need to identify the value and the color for the high threshold. The default configuration is such that the high threshold is not active.

How to compute Thresholds

Some of our customers have pulled analytical data to determine what the thresholds should be for yellow and green and changed that value to reflect accordingly. (The Workload Balancing Report would have this data, even if you are not using the gauge).

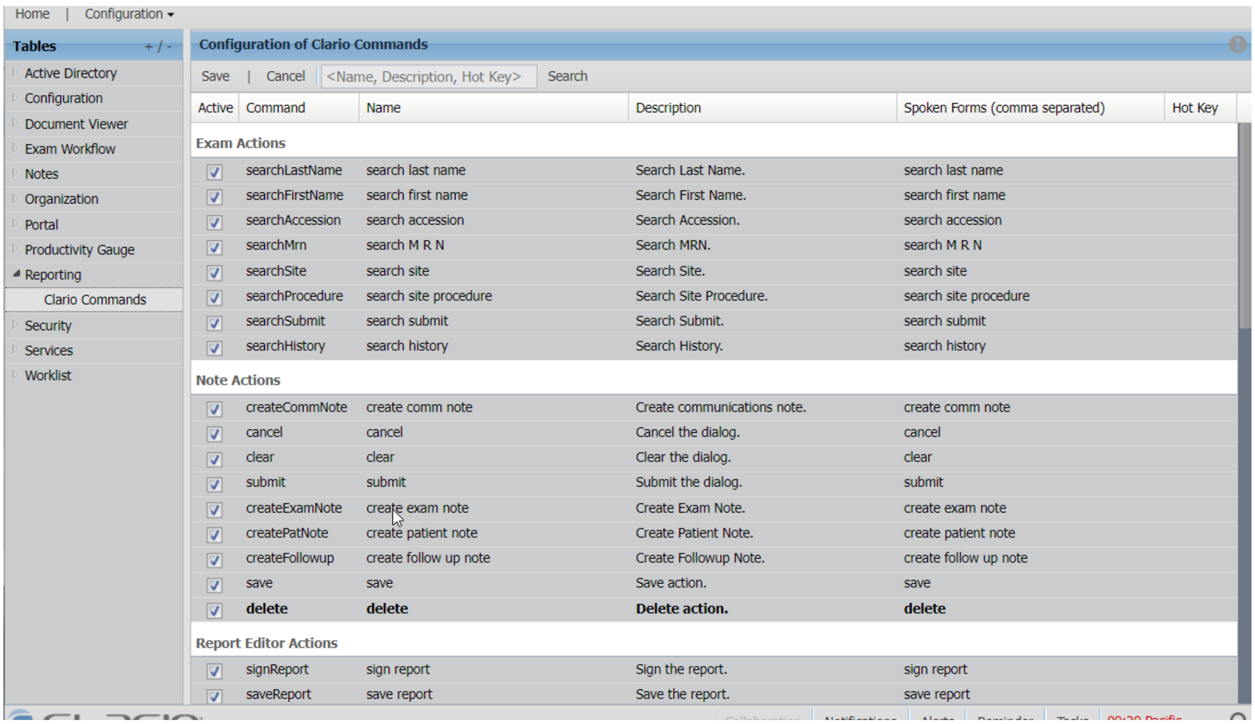
Essentially, you are asking your practice, what would define yellow (how many work value units) for this shift. We could suggest taking a look over the past year and identifying the average work values worked on each of those shifts and then identifying a threshold in that way, or just taking a rough estimate guess. Our customers have done both.

For more information on Work Value Units, reach out to your account manager.

Reporting

Clario Commands

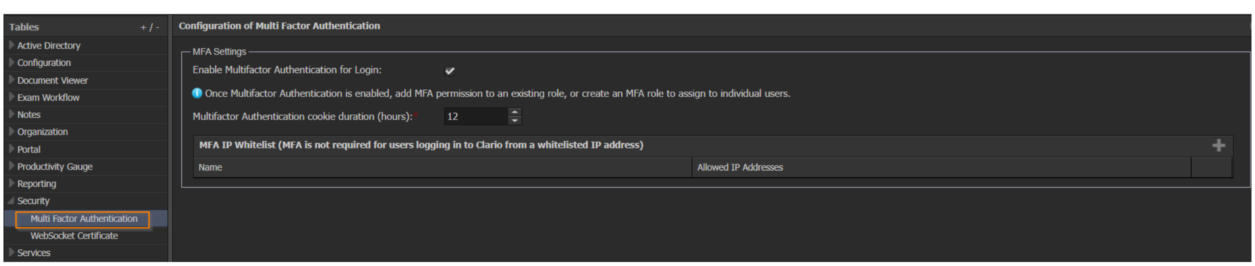
Clario provides numerous commands that can be activated/inactivated.



Security

MultiFactor Authentication

Allows the site to turn on MultiFactor Authentication for security purposes as an extra layer of protection. When accessing the application remotely, this prevents inappropriate access.



Websocket certificate

Websocket certificates are configured by the Clario SmartWorklist service team.

Services

AI Navigator

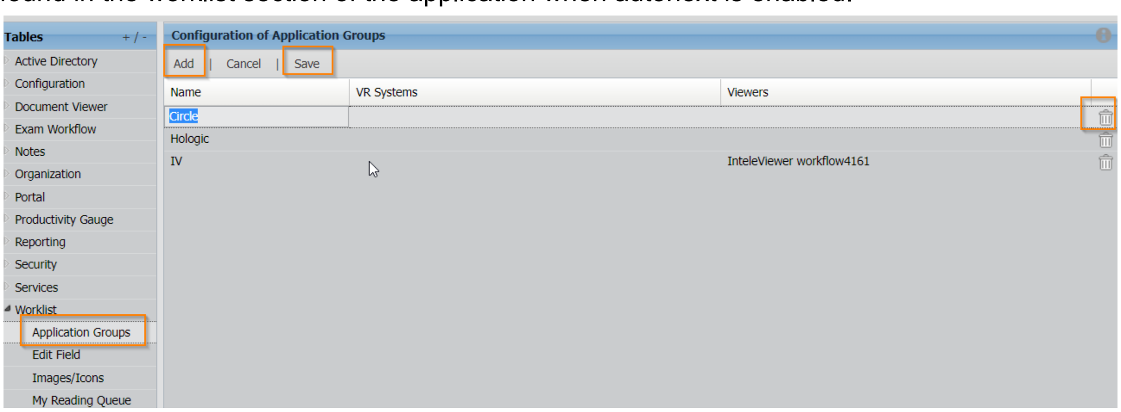
Third party AI configuration is done in the AI Navigator.

fz Worklist

Application groups

If different groups utilize different applications for PACS viewers or VR systems, those are configured here.

This is where you configure the applications used for the autonext "optimizer." The autonext optimizer is found in the worklist section of the application when autonext is enabled.



The optimizer is used in auto-next to minimize switching between applications, modality and body part. This will minimize switching between applications by preferentially selecting exams to read that use the same applications.

See the "Worklist> Auto Next" section of the guide for more information on this feature.

Edit Field

This is where fields for certain sections in the worklist such as the patient section, order section, report hover can be edited.

This section is divided into two parts - Fields and Configuration

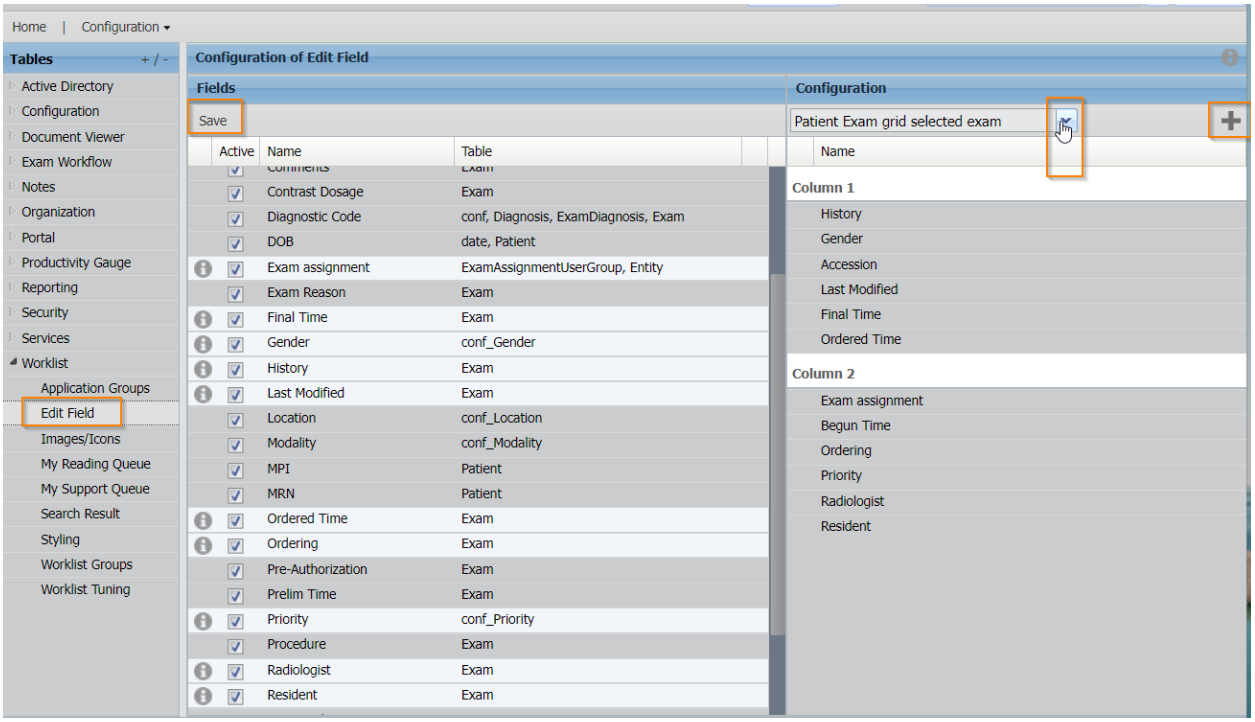
Fields: These are data elements stored in the database. The Name fields are checked Active by default. If they are unchecked they will be hidden from the Patient View Order tab. The Table column shows what database table the data resides.

- To add a field, drag and drop any of the fields under the Column 1 section.
- To delete a field, simply click the garbage can icon on the right hand side of the corresponding line.

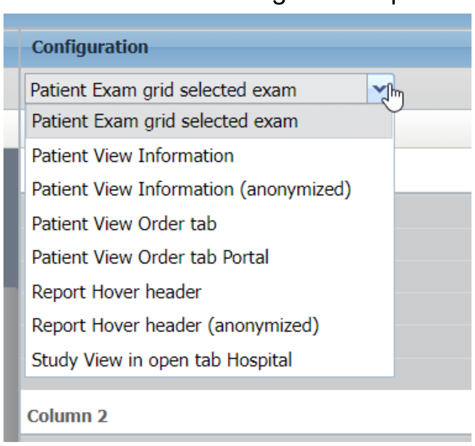
Configuration: The drop down allows you to access different sections of the application where the Fields can be added or removed.

- To add a new column click the plus sign icon and Column 2 will populate in the Configuration field.
- To delete a column, delete all the fields. When the last field is removed the column will be removed.
- Drag over whatever information you would like to see displayed in the new column. In this example "Site" was dragged over to populate Column 2.
- Use the garbage can icon to remove any of your selections. When you delete the last item the column is removed as well.
- This Patient View field can also be configured to display only anonymized information.
- By default this option will display only DOB, Gender and Age. (MPI and MRN are removed)
- Add or remove fields in the same way - dragging/dropping to add and click the garbage can icon to remove.

Note: It is possible to add PHI by adding fields. Be aware of what you are adding if you wish this view to remain anonymized.



There are several configuration options available in the drop down menu for customization



Images/Icons

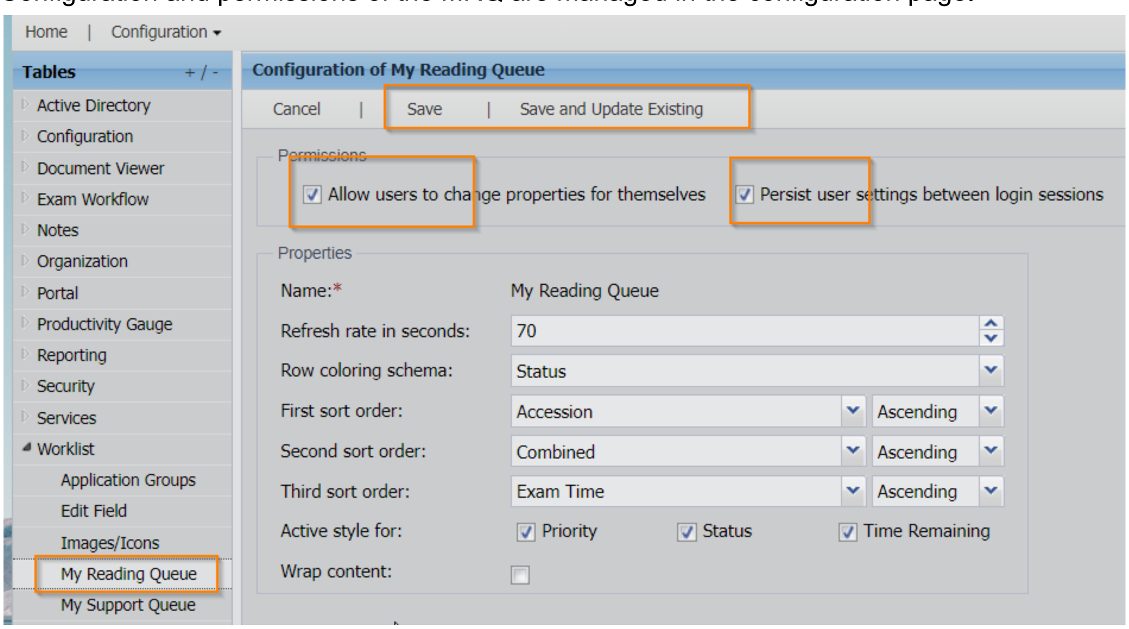
- This is where the logos displayed on the Home screen, worklist header, portal home screen, and portal header for each worklist theme: Light theme, classic theme, dark theme are configured.
- Adding Logos to the Customer Login Screen as well as page headers is quite easy!
- It is important to note that the Clario system is particular about the image size. Take note that the height measurement is quite important.
- The image can be either .png or .jpg.
- For the big logo, used on the login page, the Clario system requires nothing larger than 600px by 280px.

- For the smaller logo, used as the page headers in the system, the Clario system requires nothing larger than 300px by 28px.
- It is also important to note that a logo needs to be added for each background in Clario.
- Clario has 4 different background types (themes): Dark, Gray, Classic and Light.
- The user setting up the logos in the system will want to make sure that a logo is added for each theme.
- The system allows different logos to be used on different background themes.

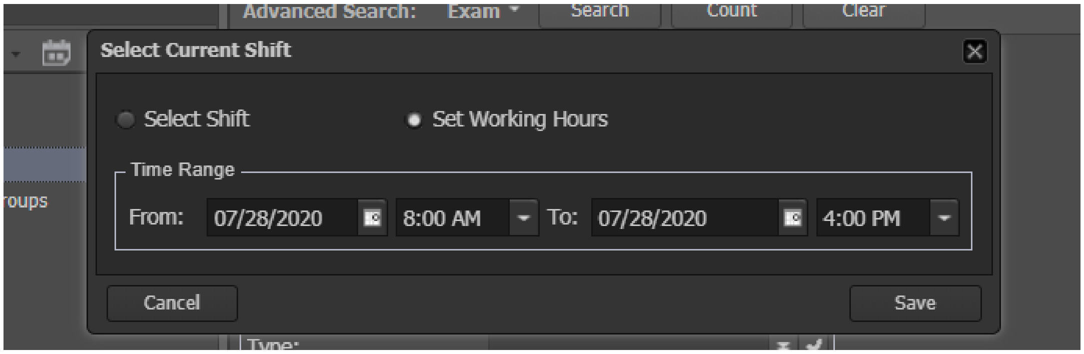
MRQ (My Reading Queue)

My Reading Queue is a worklist designed to help you sort and organize your worklist according to your specific reading priorities.

Configuration and permissions of the MRQ are managed in the configuration page.

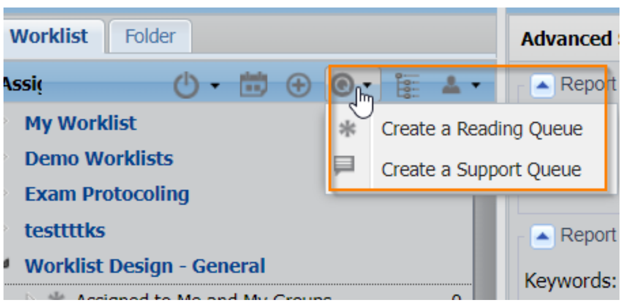


Clario is currently using shift based workflow wherein MRQ will be built for the radiologists upon login once they select their appropriate shift.



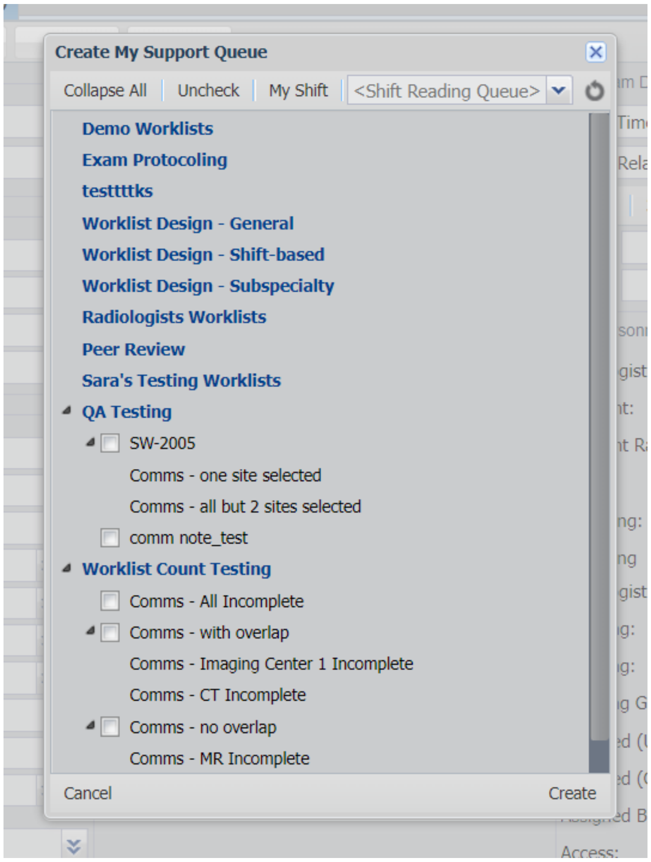
My Support Queue

The My Support Queue (MSQ) is analogous to the radiologist's My Reading Queue(MRQ), with all the same functionality, applied to Comm Note worklists:

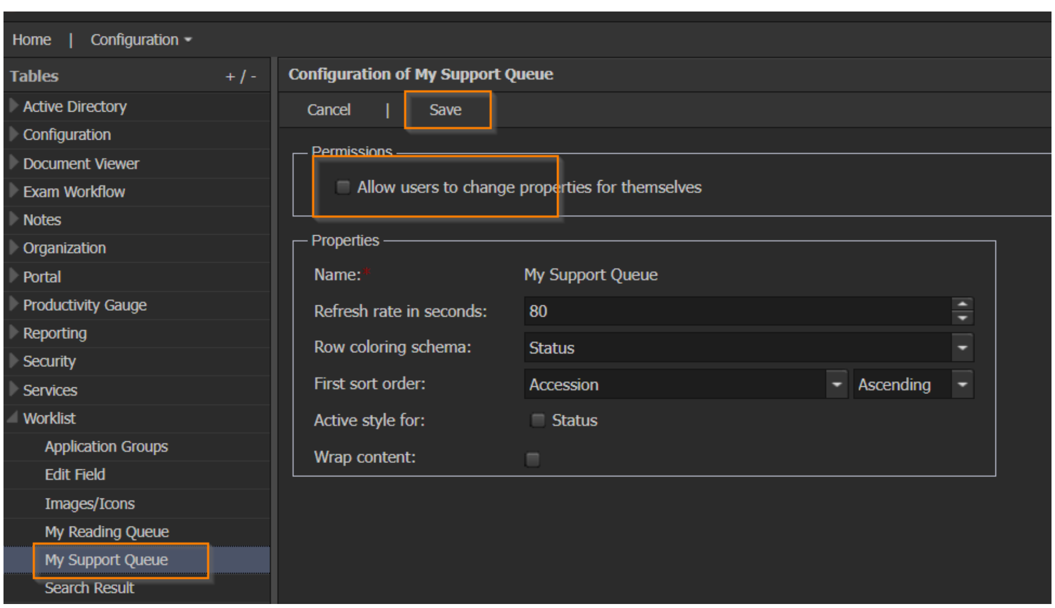


A new option is now available on the worklist toolbar to

"Manage My Support Queue"". The pop-up allows support teams to build their MSQ from Comm Note worklists.



Checking the permissions allows Admin team to limit users ability to change their MSQ properties

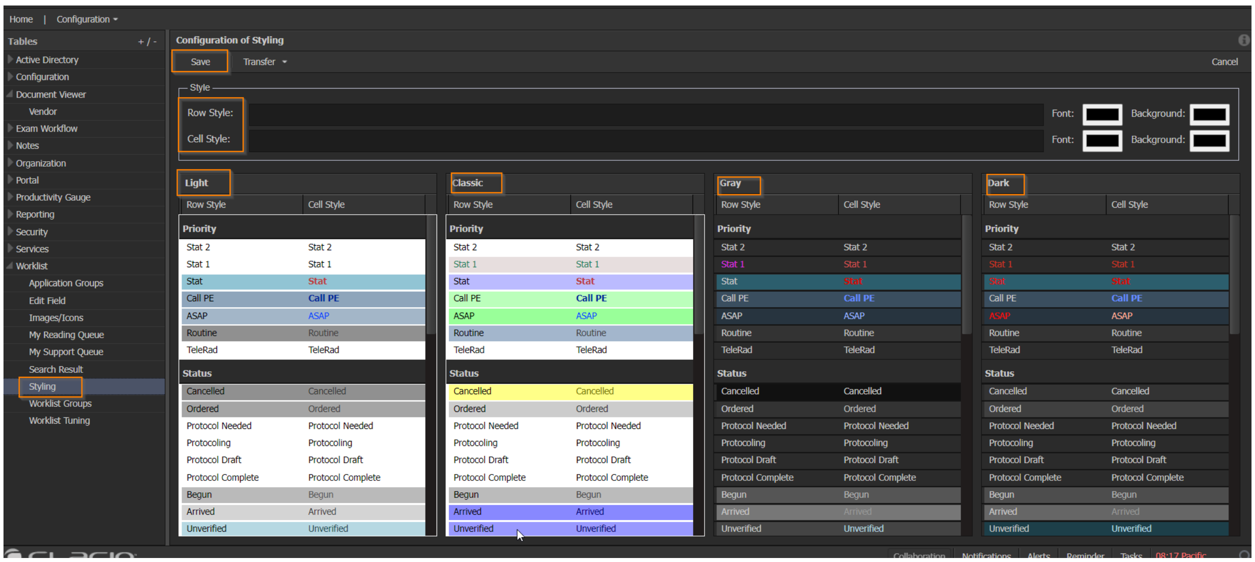


Search Result

This page should only be edited with the guidance of a Clario Technical Resource. Changing any fields on this page can result in the entire worklist page breaking. This part of the configuration module allows the user to configure and arrange columns for each type of advanced search within the worklist as well as patient view and other areas in the application.

Worklist Styling

Users now have the ability to change the color of their status icons and backgrounds.



Worklist groups

In this part of the configuration module, users can set up groupings for worklists. Access to worklists groupings by site, group or practice is also configured in this section.

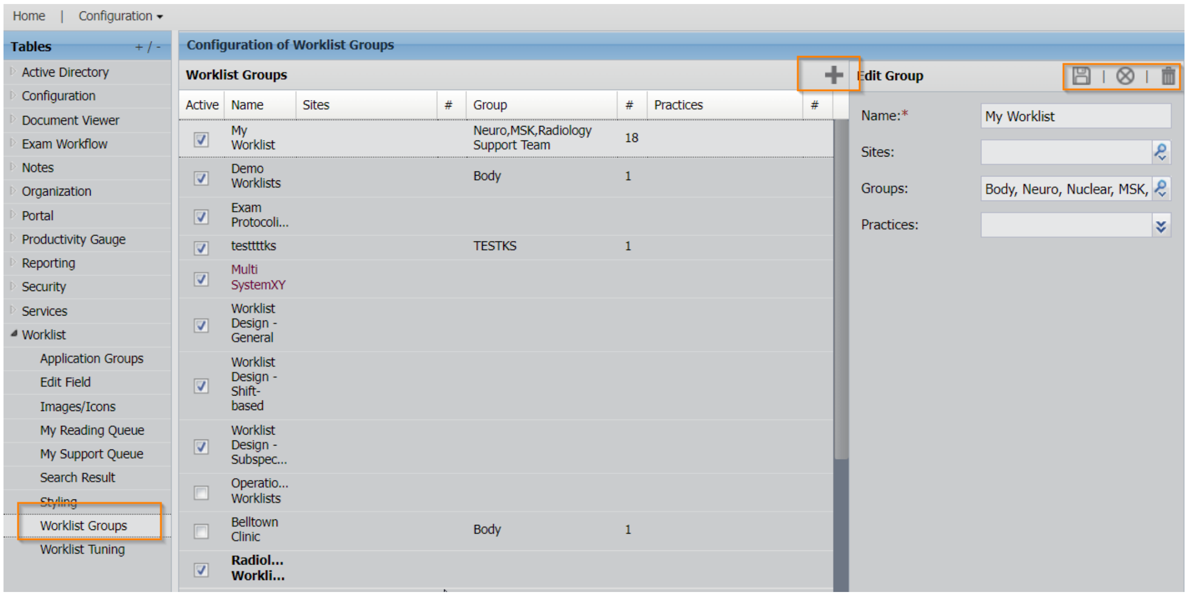
How to Create Worklist Groups

Worklist Groups need to be configured so global worklists can be added to these groupings. Worklist Groups can only be created by users who have the "Create/Edit Group and Enterprise Worklists" permission.

To create Worklist Groups

1. Navigate to Management --> Configuration > Worklist > Worklist groups.
2. Select the "Worklist Groups" table.
3. Select the plus icon to "Add New Group".
4. Create a name for the new group.
5. Optionally, set access to the worklist group by site credentialing or by practice.

6. Check "Active" in order to see the new group on the worklist --> Uncheck "Active" or select the trash can icon to remove the group from the worklist.
7. Select "Save".



You can grant access to a particular worklist group to groups of people by selecting the group. For example, if you only wanted the "Body" group to see the "Belltown Clinic" worklist group, then you can select "Body" under the group drop down. Once this is saved, any user that is not in the body group will not be able to see that worklist group. *This feature should be utilized in replacement of the "practices" feature.*

Access to Worklist Groups

Managing access to worklist groups may be important for your practice if there are certain sites that do not need access to certain worklists.
In order to manage access to worklist groups, go to Management > Configuration > Worklist > Worklist Groups.
For example, if only users credentialed for particular sites should have access to a workiist

1. Click on the worklist group that you want to limit access to.
2. Click in the "Sites" column and a drop down menu will appear with a list of all possible sites.
3. Select the sites that you would like to have access to the worklist group.
4. You must click the "Save" button at the bottom on the page or your changes will not be saved.

Once all of these steps are completed, only the users credentialed for the specified sites will be able to see the selected worklist group.

If you do not select any sites for the worklist groups, all sites will be able to see that worklist group.

Worklist Tuning

This is where you:

1. Manage enterprise worklist counts
2. Set the global count refresh configuration – default 60 seconds
    - This is the interval in which the count will refresh.
    - This is not the refresh rate of the worklist (worklist refresh rate is set in worklist properties)
3. Where you turn on worklist counts
4. Where you turn off worklist counts
5. View details about the worklist such as the seconds it takes to refresh and number of exams on the worklist
6. View Worklist Refresh Rate Logs:
    - Start: Each start time of count refresh
    - Duration: How long it takes to refresh all worklists with an 'active' count
    - Worklists: Number of worklists with an 'active' count

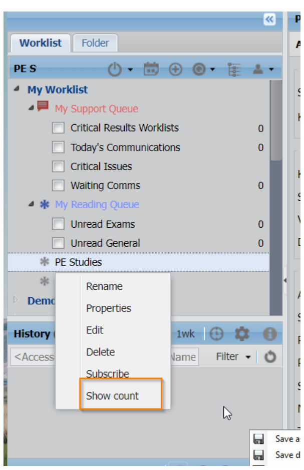
Configuring Worklist Count

Clario allows users to display an exam count for each worklist. The exam count is the number of exams currently on the corresponding worklist. For enterprise (global) worklists, administration will need to activate the exam count display and set the global count refresh rate.

User specific worklists such as "Assigned to Me" or Assigned to My Groups" will need to be turned on manually by each individual. With the enhancement in Clario the Exam Count widget can now include both final and prelim exams.

To turn on counts for user specific worklists (ex:assigned to me):

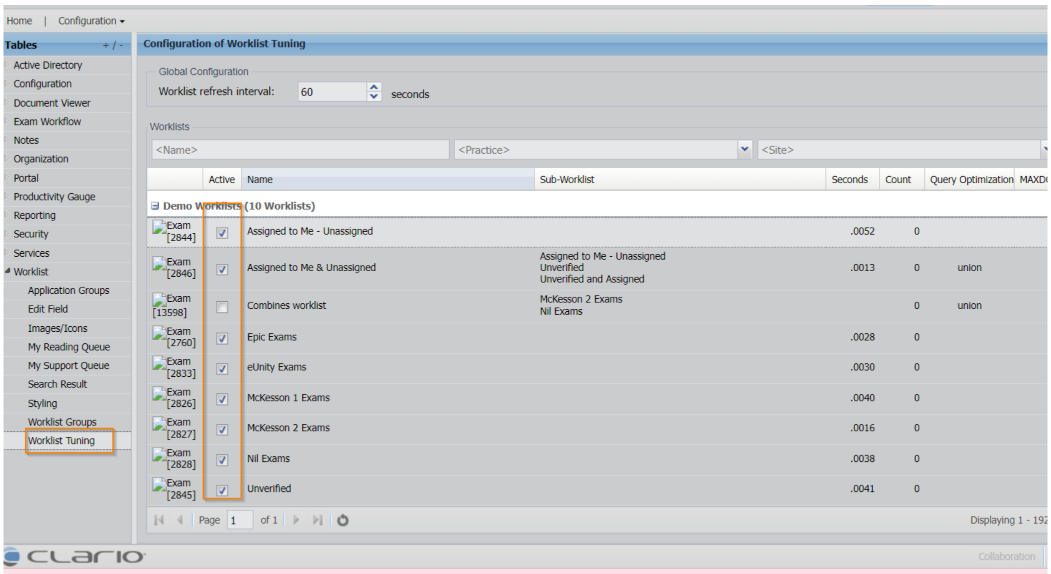
1. Right click on the worklist
2. Choose "Show Count"



To manage counts for enterprise worklists:

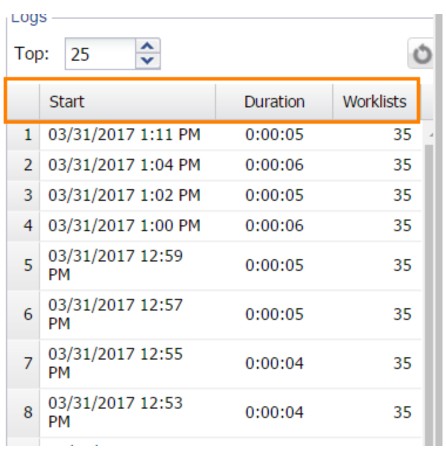
1. Go to the Management module.
2. Select Configuration.
3. Select the Worklist Tuning table.

4. Set the Global configuration for the count refresh rate.
    - This is the interval in which the count will refresh.
    - This is not the refresh rate of the worklist (worklist refresh rate is set in worklist properties).
5. Check the 'Active' box to display count for each worklist.



Explanation of Logs table

- Start: Each start time of count refresh.
- Duration: How long it takes to refresh all worklists with an 'active' count.
- Worklists: Number of worklists with an 'active' count.



To help investigate the issues with worklist queries, a new tool has been added in version 4.1 which is accessed by right clicking on the worklist tab title and clicking the export button. This exposes the actual query statement and allows the user to export the statement for a deep analysis on the worklist query. This tool is used by support or dev teams.

Scheduling

Shift Management

Clario offers a scheduling tool to manage radiologist shifts and shift workflow and to ensure your radiology staff is scheduled to meet expected exam load. Clario offers three options for how shifts can be populated into the scheduling tool.

1) Clario will integrate with QGenda to automatically populate the schedule with shifts created in the QGenda tool and to automatically log radiologists into their appropriate shift for the day.
2) Shifts can be manually created.
3) Schedules can be imported into Shift Management using a template provided by Clario.

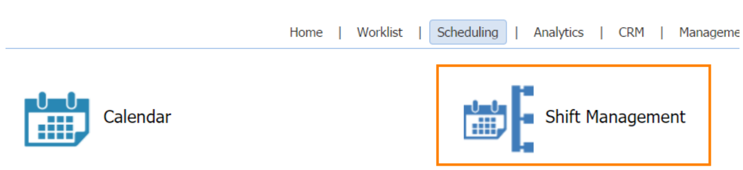
One of the major benefits of using Clario's Shift Management tool is to automatically build radiologists My Reading Queue when they log into Clario. My Reading Queue provides the radiologist with the worklists and exams that they need while working a specific shift. Other benefits such as shift RVU/WU goals and shift exam assignment can be utilized when using Clario's Shift Management tool.

There is also an option in Schedule Management to associate Comm Note worklists with a shift by creating a “My support queue”

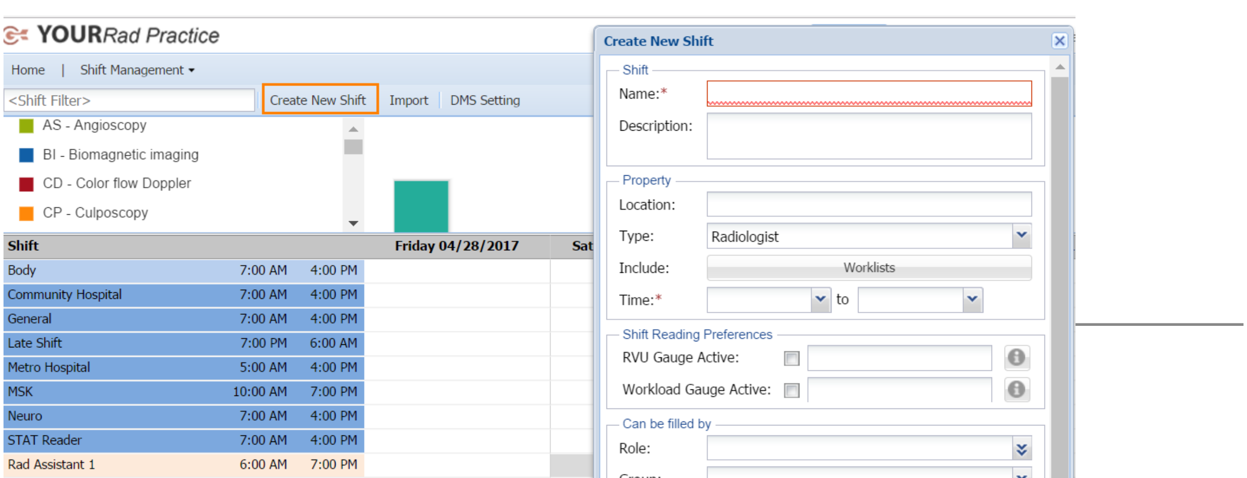
There is a pop-up option that allows the support team to build their MSQ from comm note worklists

How to create a shift

Open the Scheduling tool and select Shift Management

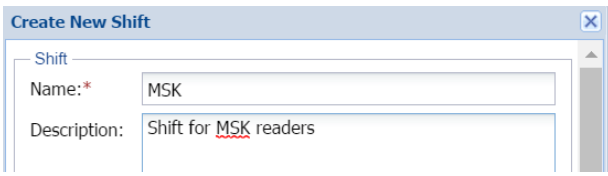


Select "Create New Shift"



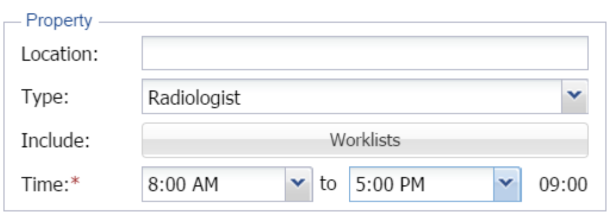
Shift

Enter a name and description of the shift



Property

Enter the properties of the shift

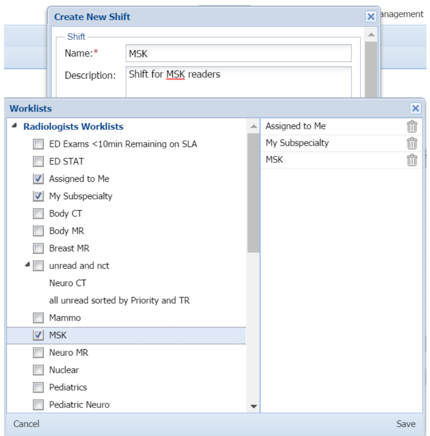


Type:

If the shift was created by QGenda, the Property type would default to "QGenda". In order for Clario to match QGenda's shifts, the type must not be changed to anything other than QGenda. If manually created, you may select a different type.

Include: (Worklists):

Select the worklists button to add and arrange worklists that will appear in users My Reading Queue when logged into this shift



Check the box next to the worklists you would like included in the shift

In the right panel, drag and drop the worklists in the default order you would like them to appear in My Reading Queue.
Select Save when complete.

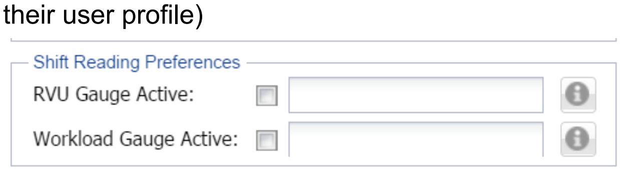
Time:

Enter the time the shift will be active

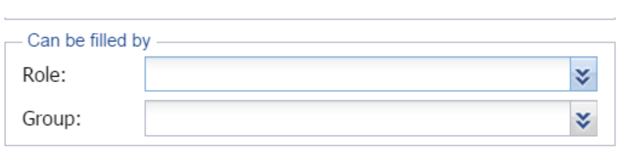
Shift Reading Preferences

Check the box next to the RVU Gauge or Workload Gauge to activate either gauge per shift

Set the RVU or WU Goal per shift (Note: This goal will overwrite a users personal RVU or WU goal set in their user profile)



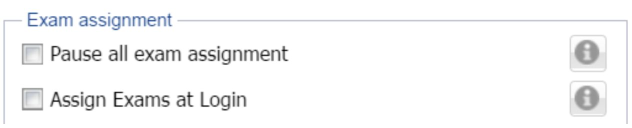
Optionally select who the shift can be filled by



Exam Assignment

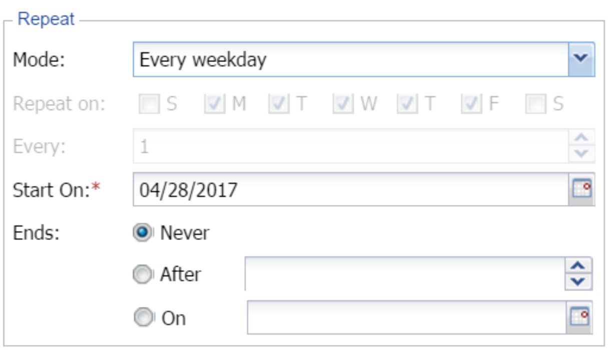
Optionally, users can choose to pause all automated exam assignment for radiologists logged into this shift

Optionally, users can choose to "batch assign" exams at login.



Repeat

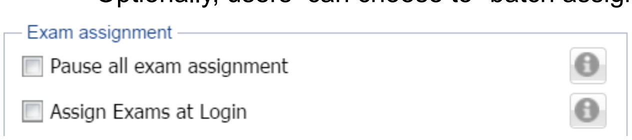
Set the repeat mode



Exam Protocol

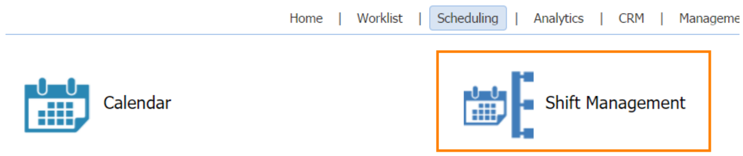
Add new exam assignment triggers Clario to assign an exam when a Protocol is needed. Added Protocol tab to the study panel for viewing completed protocols, and now when an exam is in any of the protocoling statuses, the Dictation tab becomes the Protocolling tab with the report editor for creating/editing protocols. The Protocol tab is only visible if the feature is licensed.

Optionally, users can choose to "batch assign" exams at login.

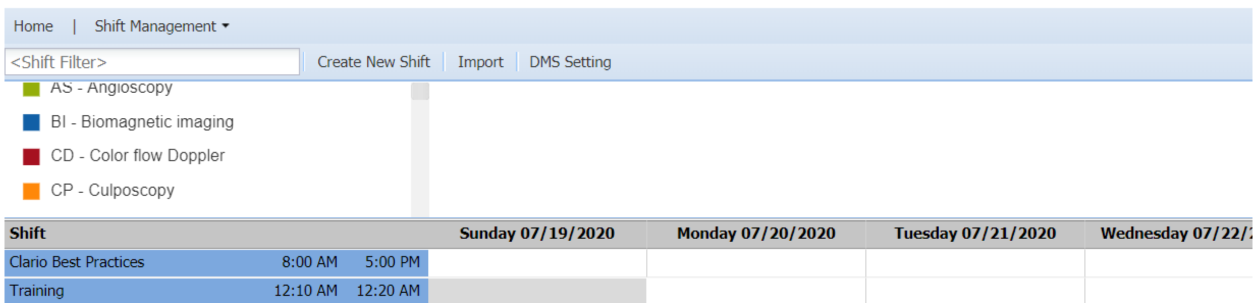


How to edit a shift

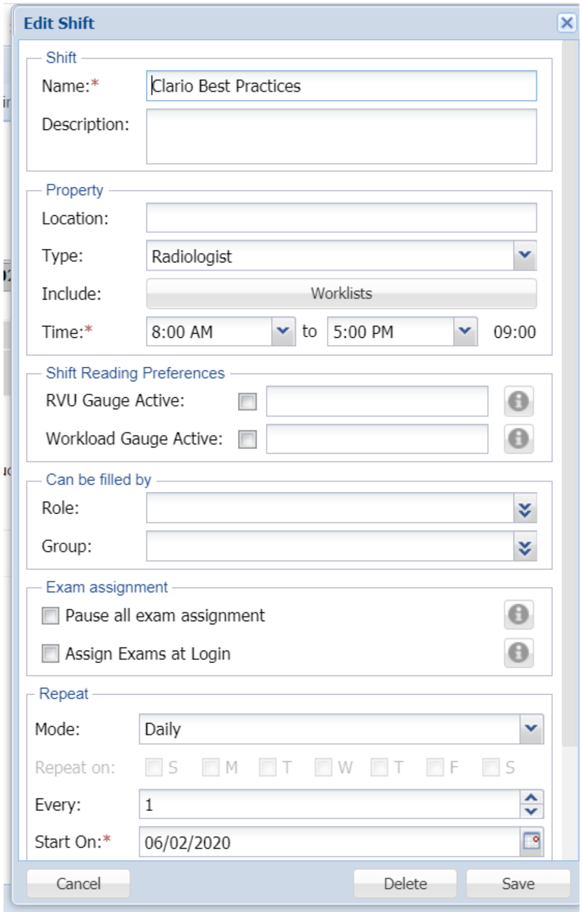
Open the Scheduling tool and select Shift Management



Select the shift you would like to edit from the left hand side by clicking on the name of the shift..



A pop-out window will open up wherein the shift parameters are in “Edit Shift” Mode.

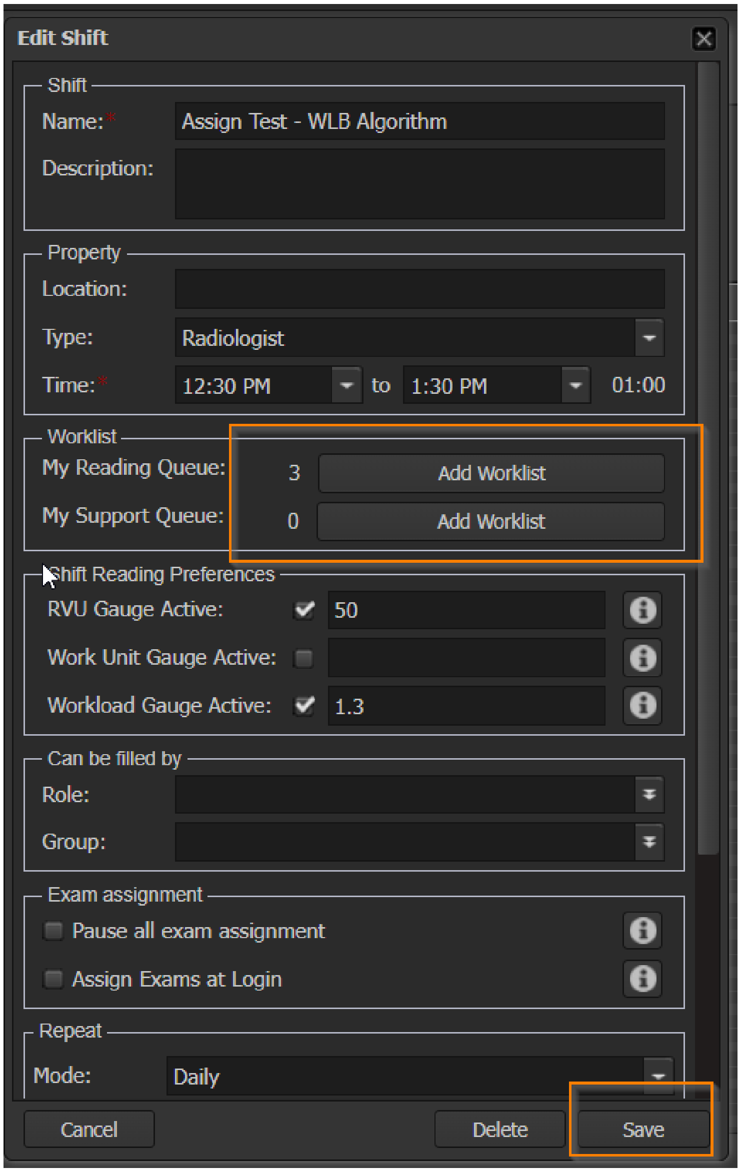


Make the needed edits and select save when complete.

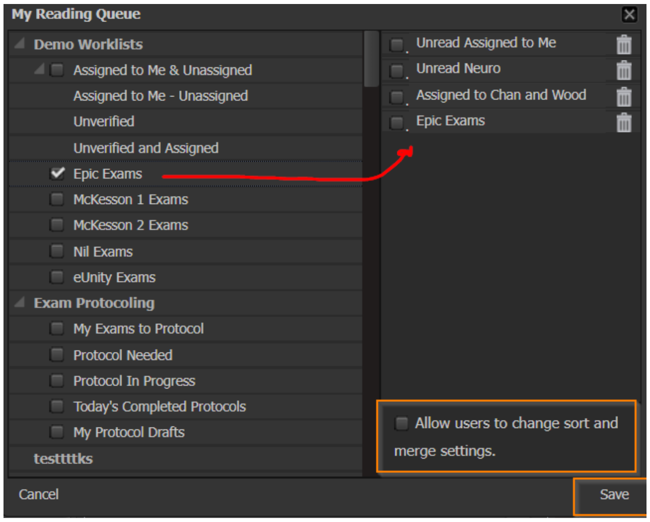
How To Associate Worklists with Shifts

Once you have built all of your desired worklists, it is time to associate those worklists with a shift. In order to do this, you will need to navigate to the shift management page in Clario. From the Clario home page, go to Scheduling > Shift Management.

Once you are in the shift management page, select the shift that you would like to associate a worklist to by clicking on that shift name. When you click on the shift name, a pop up will appear with a list of options for that shift. Select "Worklist".



After selecting "Add Worklist", another popup will appear. In that popup, you will see a listing of all possible worklists on the left hand side. In order to associate a worklist with that shift, drag and drop the worklist to the right hand side of the screen. Once you have moved all the appropriate worklists for that shift to the right hand side of the screen, you can drag and drop them into the desired order. The order that you put them into on this screen is the order they will show up for in the radiologists reading queue. Therefore, this order should be the desired reading order, so that the radiologists can work through their reading queue from the top down.



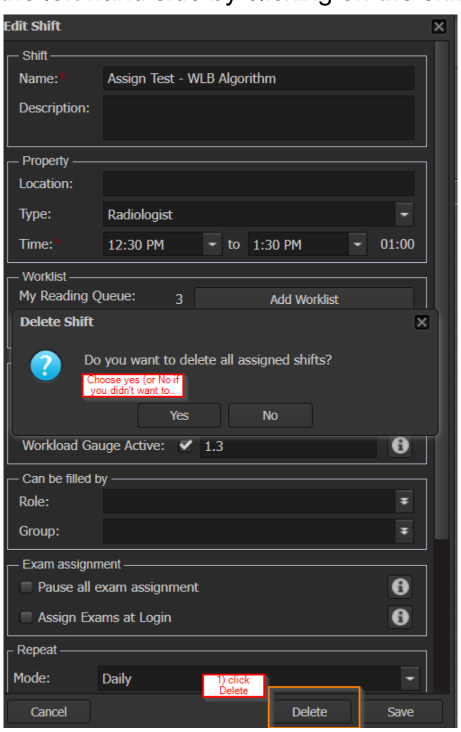
You can control whether users can edit the sort order or merge these shifts.

If you DO NOT want to allow users to merge or move the order of the shifts, do not check "allow users to change sort and merge settings".

If you DO want to allow users to merge or move the order of the shifts, check "allow users to change sort and merge settings"

How To Delete a Shift

To delete a manual shift from Clario (Note Qgenda shifts can not be deleted), simply select the shift from the left hand side by clicking on the shift name.



A popout of the shift preferences will open up. Simply select “Delete”

Qgenda Integration

If the client has a Qgenda Integration in place with Clario wherein the shifts will pull from Qgenda and populate in the Clario Scheduling Module.

Clario uses radiologist shift information in two ways:

- Ensure that the radiologist reads the right exams: When Clario knows which shift a radiologist is working, the radiologist's 'My Reading Queue' can be auto-generated with the right worklists for that shift. Also, assignment rules can be built to auto-assign exams to the person covering the shift.
- Analyze productivity per shift: When Clario knows which shift the radiologist is working, the system will save the shift to which the rad was assigned when the exam was read. You will be able to analyze which exams were read on specific shifts and measure productivity per shift.

Clario can connect to your QGenda account and populate Clario's Schedule module with shifts and scheduling. The Clario-QGenda integration uses a web service call that is configured to run once/day at 2 am.

Setting up QGenda users in Clario

To enter the QGenda IDs in Clario:

- Go to Management

- Select User Management

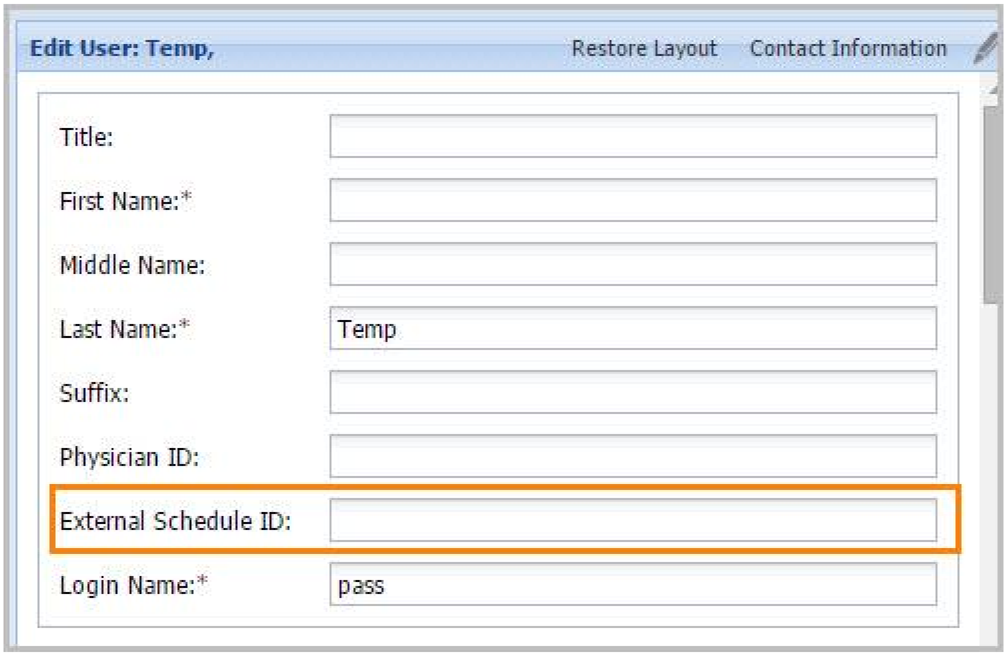
- Select the user from the list

Users <Real Name, Login Name> Search

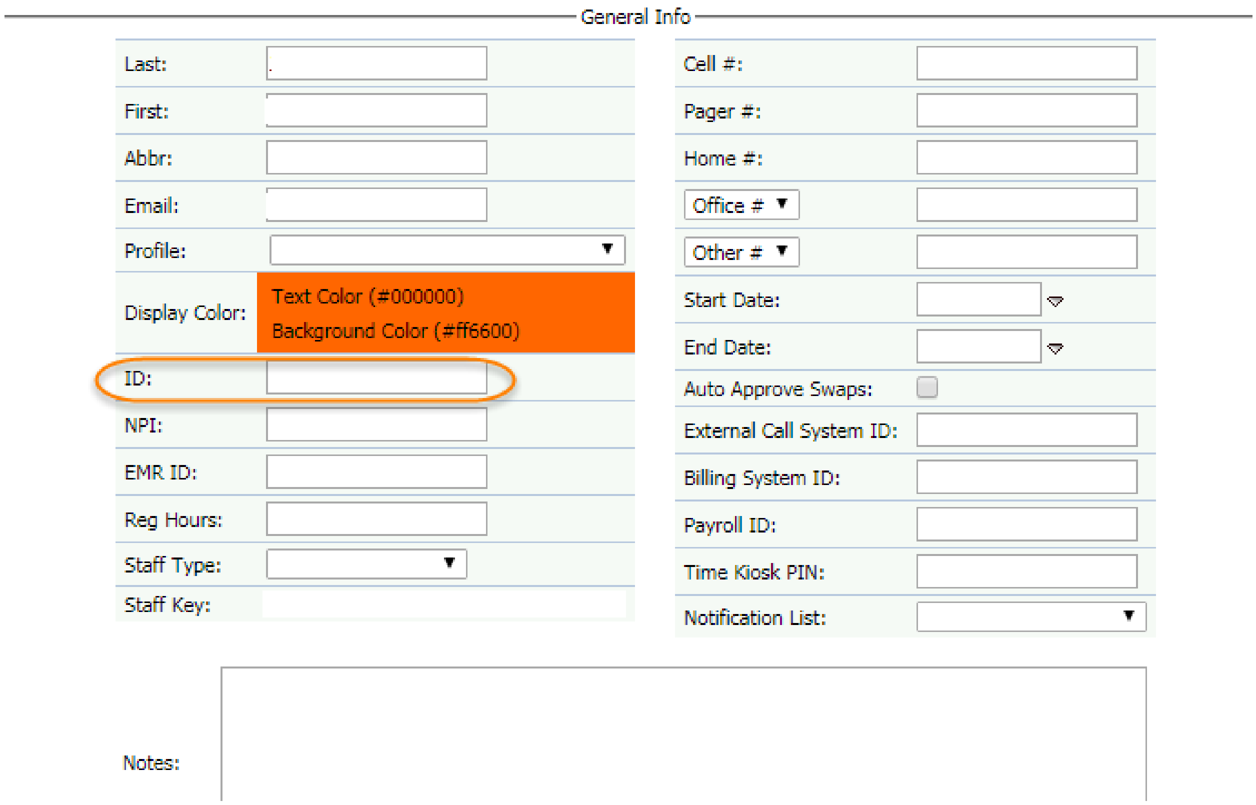
Real Name	Login Name	User Roles	Last Action	Online
test97, test97	**test97**	**Active**		**No**
test98, test98	test98	Active		No
test99, test99	test99	Active		No

- Select the pencil in the upper right corner to edit the user 

- Find the "**External Schedule ID"** field. Here is where you enter the User's QGenda ID:



The QGenda ID is found under General Info in QGenda. The ID can be an arbitrary number but the QGenda ID and the Clario External Schedule ID must match.



- Make sure to select the save icon when finished! (Upper Right)

Troubleshooting the Qgenda Integration

If shifts are not populating correctly in Clario, there may be an issue with how the shift is configured in Qgenda. Here are some helpful tips with the Qgenda Integration.

- Qgenda is web based scheduling software that can populate Shifts in Clario's Shift Management and assign the appropriate Radiologists to that shift.
- There is a daily Qgenda file that the Integration Daemon picks up and will make updates on a daily basis.
- Same day changes wont be seen in this Integration, the pass of information is only done 1 time a day.
-
- Qgenda is divided into two categories:
  - "Staff"
  - "Tasks"
- The goals is to get the proper "Tasks" into Shifts in Clario Scheduling and the proper "Staff" associated to the Clario Users in User Management
- The Start and Stop times will be pulled in from the integrations and must be in a positive value.

- Tasks cannot have a Start and Stop time with zero length = 7:00am - 7:00am (This might be interpreted as 24 hours, but could be seen as zero time in this integration)
- Note: The time value "00:03:00" (3 minutes after midnight) is a "reserved" time by QGenda and is basically the same thing as entering no time at all.
  All shifts must have a start and end time that are not the same, or are not 3 minutes after midnight.

Calendar

Calendar Overview

The calendar module is found with the Scheduling Module in the Clario SmartWorklist. The Calendar module can be used to create reminders, give RVU or Work Unit Credit based on different calendar events. The Calendar Events can be imported via the Qgenda integration or created manually.

Configuration> Calendar Event Type

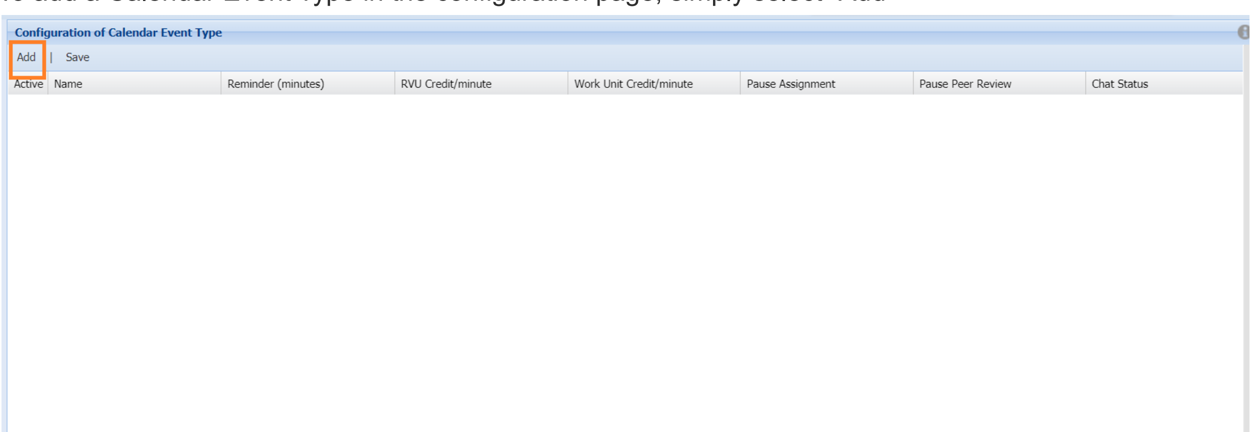
Adding a Calendar Event

In order to proceed with creating a Calendar Event, the Calendar Event Types should be configured in the configuration section of Clario.

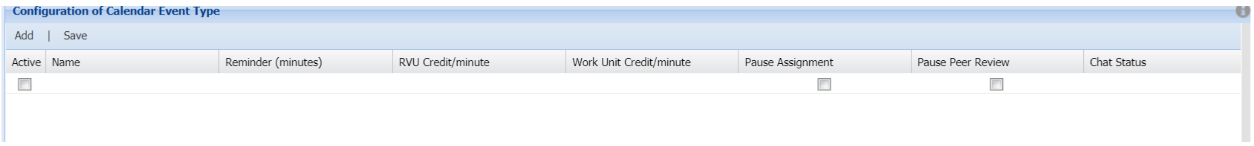
In the Management> Configuration> Calendar Event Type section of Clario, admin level personnel can define different types of Calendar events, and their worth within the system.

- This is where you can pre-define credits and other details for different event types
- If an admin needs to schedule an event for a user, they can select from the predefined list so the user will get the configured credit and settings
- Can’t delete an event type, but you can rename or make inactive.
-

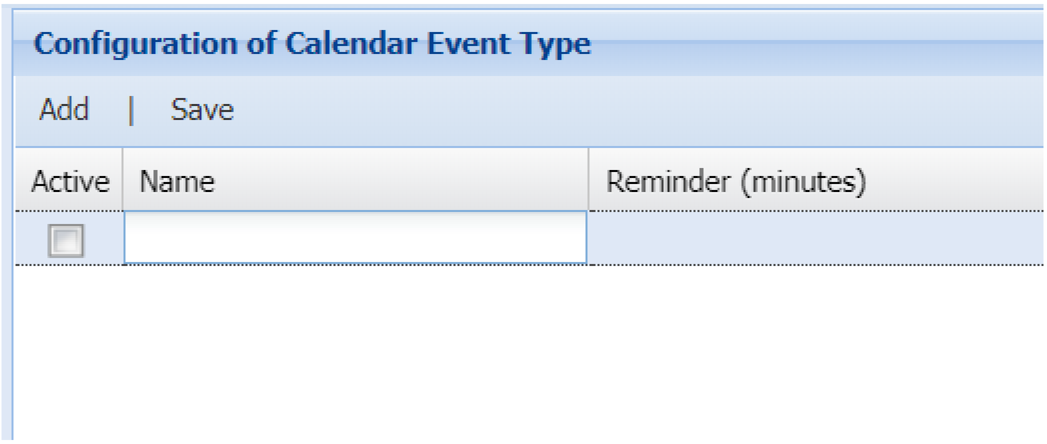
To add a Calendar Event Type in the configuration page, simply select “Add”



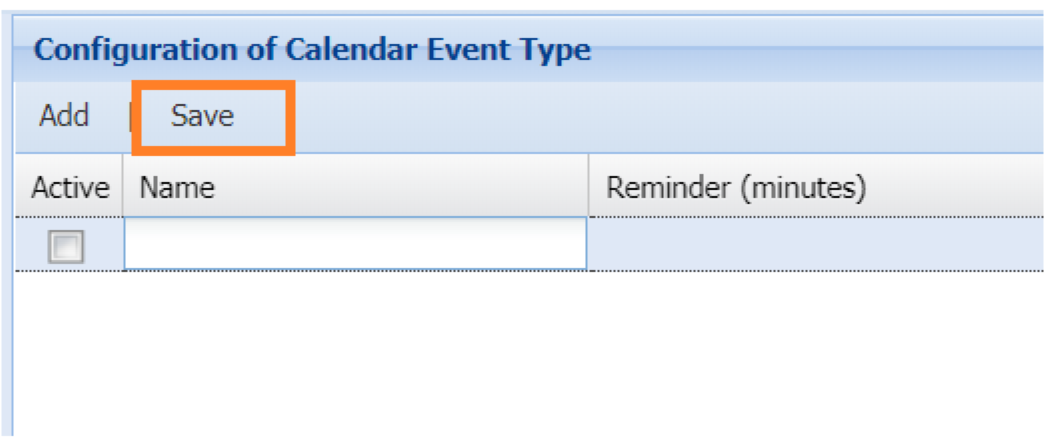
A new blank row will appear.



Doubleclick on the field to begin entering text.



Select save when complete.



Calendar Event Fields Explained

Reminder (minutes): Identify how many minutes before the event you would like the recipients to be reminded.

RVU Credit/minute: Identify how many RVU credits should be given to the recipient per minute.

Work Unit Credit/minute: Identify how many Work Unit credits should be given to the recipient per minute.

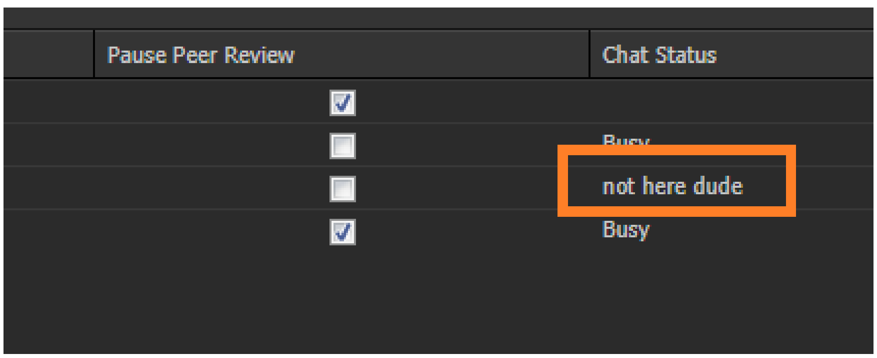
Pausing Assignment/ Pausing Peer Review

If a radiologist is a peer review user or is set up to have exams assigned to him or her via an assignment rule, this feature can be very useful. If the radiologist has a meeting, will be out of the office a day or on vacation for an extended period of time, you can choose to pause exam and/or peer review assignment during that time.

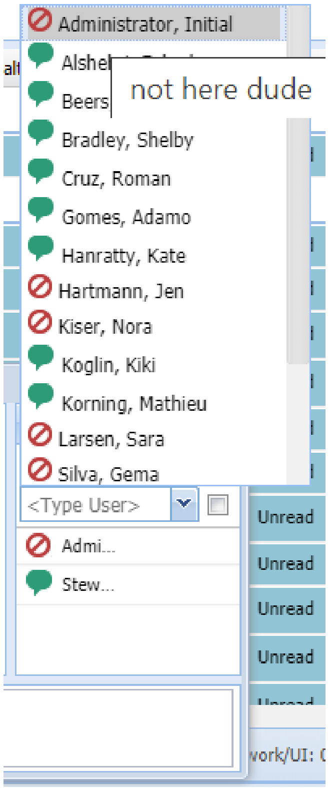
Pause Assignment: If checked, exam assignment will be paused for the recipients while in the event.

Pause Peer Review: If checked, peer review will be paused for the recipients while in the event.

Chat Status: Manually configure the Clario Chat status on the worklist page for the recipient while they are in the event. This can be useful to create a default away message or busy message. For instance in the picture below, the chat status “not here dude” was configured to display for the user when they were in the specific event.

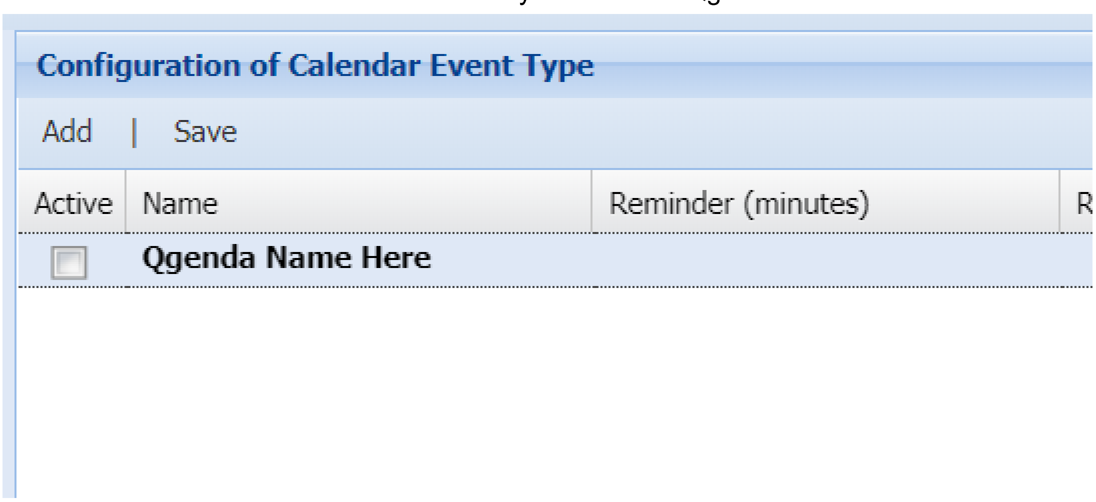


The user is in the specific event in the system, and their chat status on the worklist displays “not here dude”



Qgenda Calendar Events

In order to populate the Clario SmartWorklist with Qgenda Meetings and Tasks that are not "shifts", the Qgenda integration must first be in place. Once the Qgenda integration is in place, simply make the Calendar Event name in Clario match exactly the name in Qgenda.

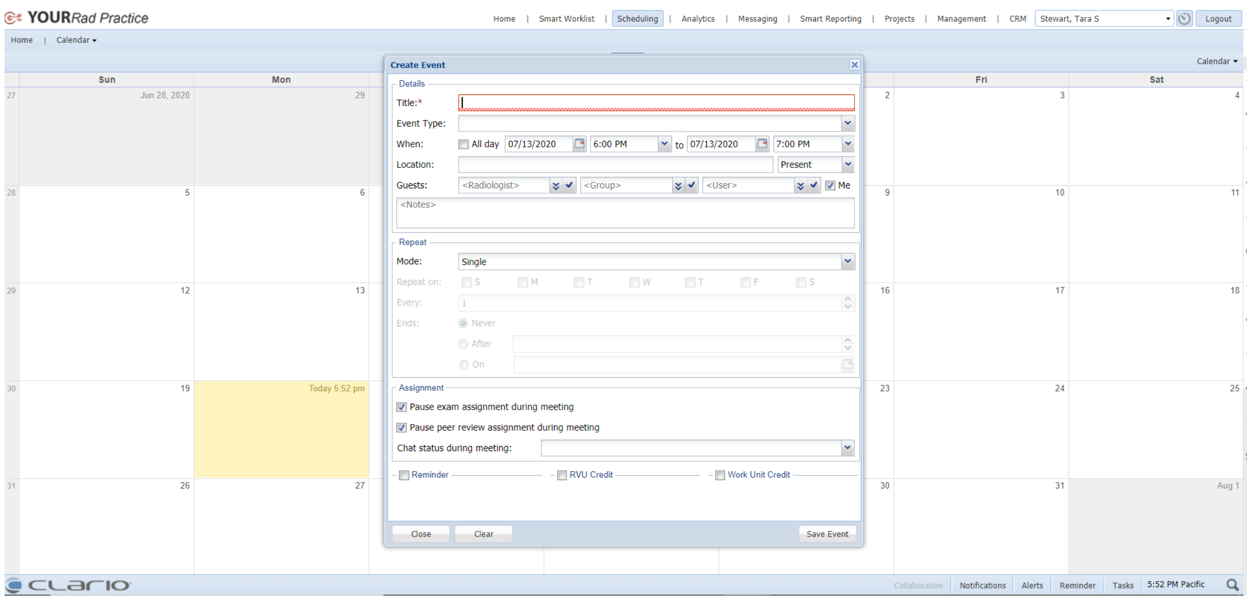


The integration will match the Name in the two systems and populate the calendar appropriately as long as the recipients have their Schedule IDs configured in User Management.
Continue with configuring the rest of the fields as indicated in the previous section.
Select Save when complete.

Manual Calendar Events

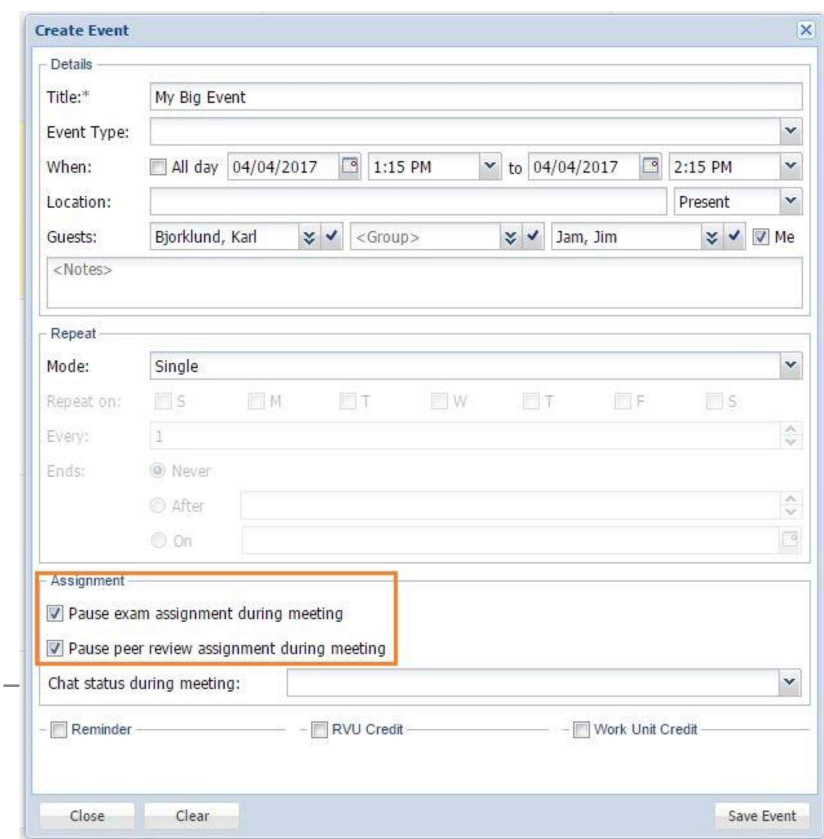
Navigating to the Scheduling Module> Calendar, you are able to see the calendar in the Clario System. Users are able to see the calendar events related to their Username in the Calendar.

To create a Manual Calendar Event, simply click on the date of the event. A Pop out window will appear.



Under **Assignment** you can set the parameters as needed.

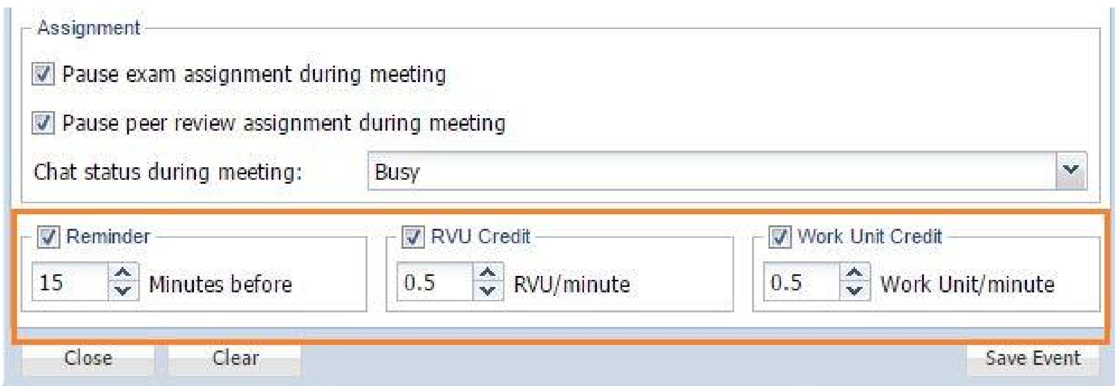
When finished click **Save Event** to save the event.

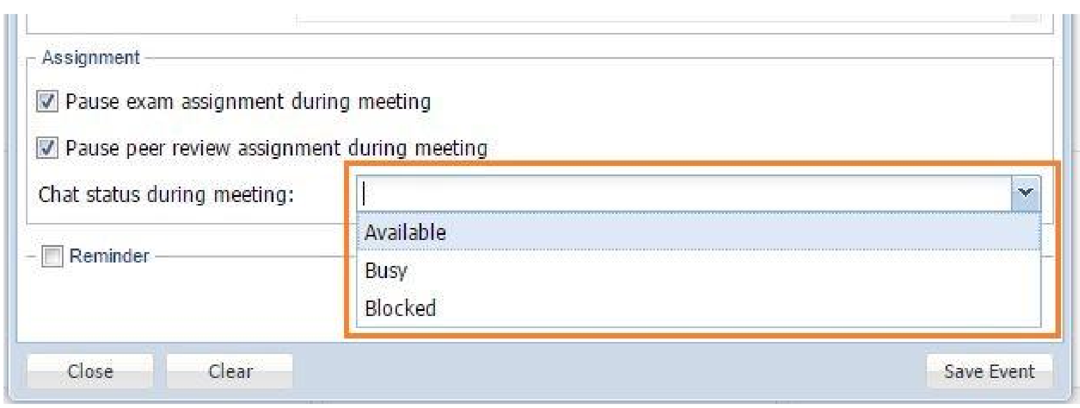


The different assignment settings can be configured with the following default parameters:

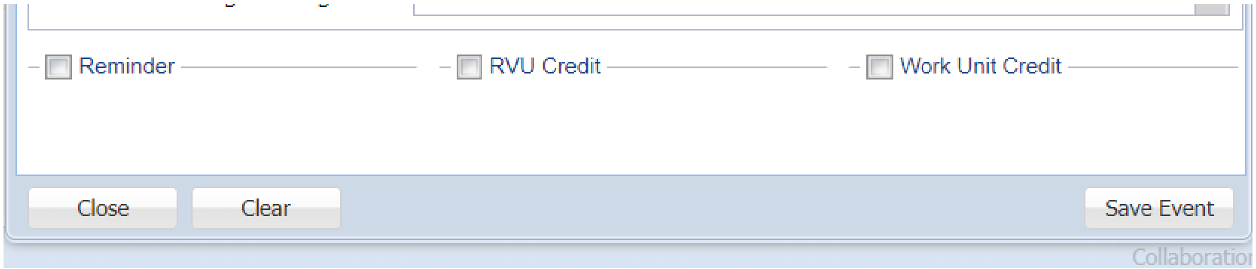
- Pause exam assignment: Checked or unchecked
- Pause peer review assignment: Checked or unchecked
- Chat status: From drop-down choose: Available, Busy or Blocked or whatever was preconfigured in the Configuration> Calendar Event Type for the specific Event Type
- Reminder: Check to set time (minutes)
- RVU Credit: Check to set RVU/minute

Work Unit Credit: Check to set Work Unit/minute





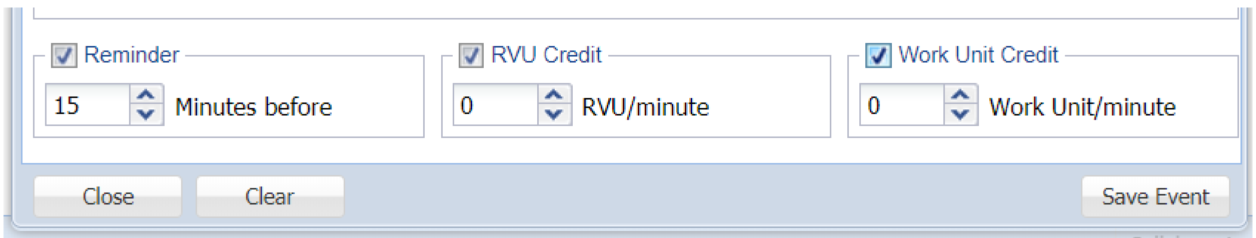
Selecting Reminder, RVU Credit or Work Unit Credit



If the checkbox for Reminder is checked, you are able to identify how many minutes before the event that the recipient should be reminded.

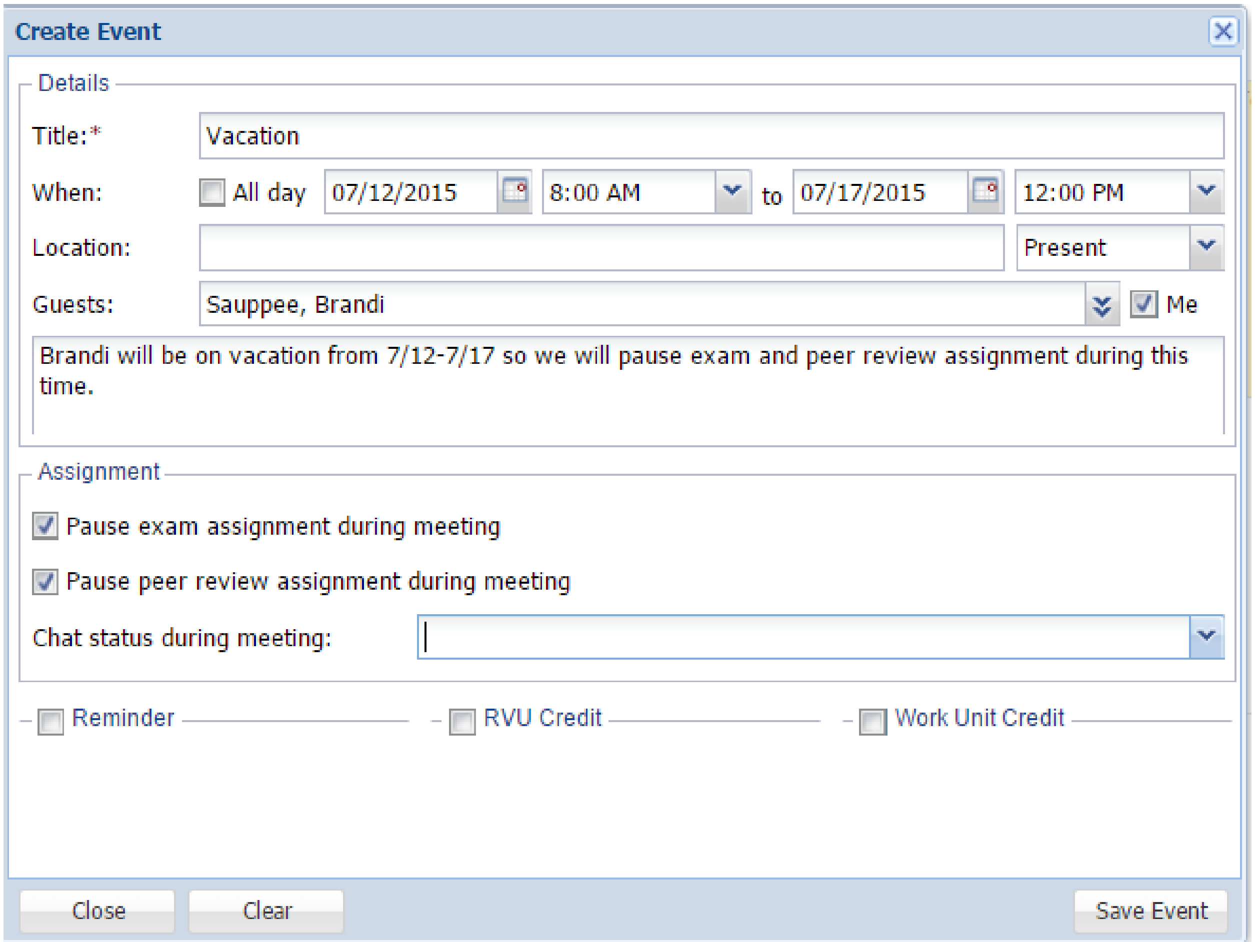
If the RVU Credit checkbox is checked, you are able to identify how many RVU credits should be given to the recipient per minute.

If the checkbox for Work Unit Credit is checked, you are able to identify how many Work Unit credits should be given to the recipient per minute.



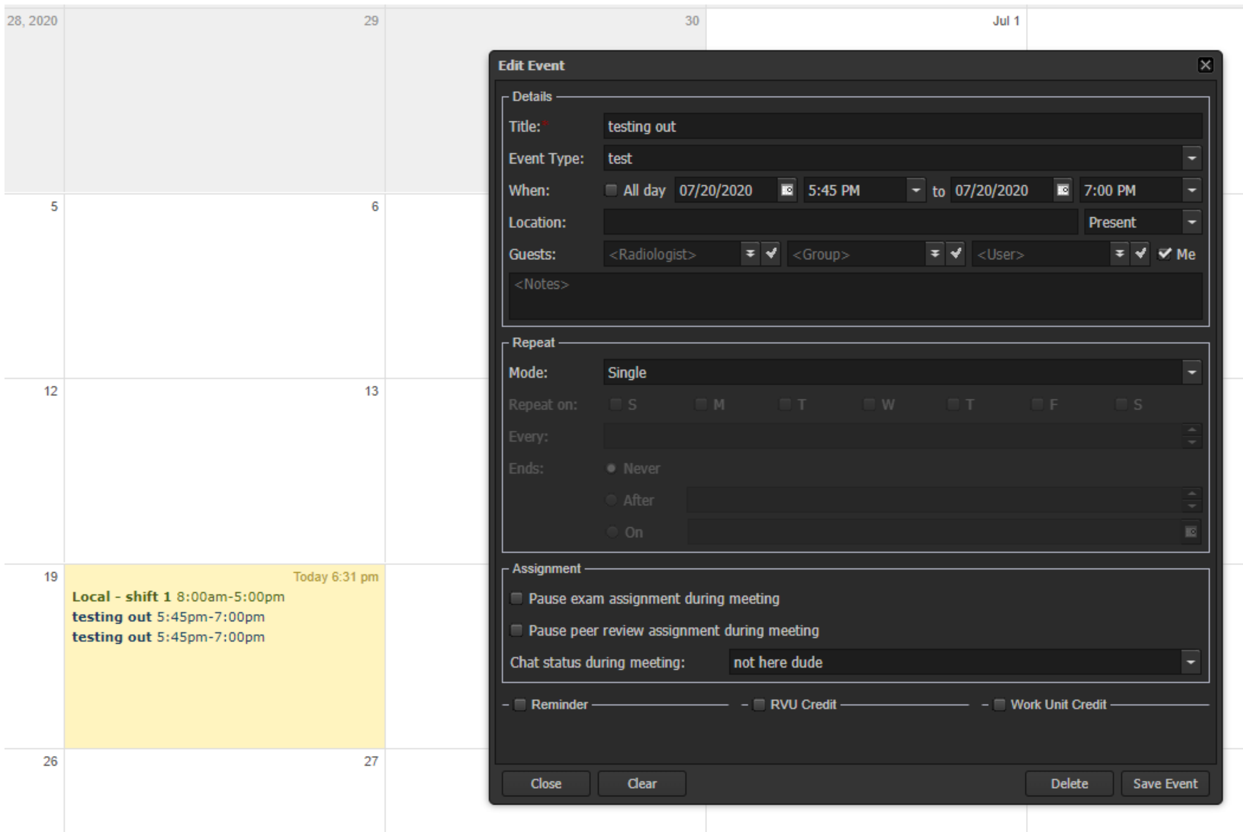
How to pause Exam/ Peer Review Assignment: Manual Calendar Event

1. Open the Scheduling module
2. Select Schedule
3. Click on the first day of the event you wish to schedule
4. Give the event a Title
5. Select All day or enter a specific time frame
6. Select the user
7. Check Pause exam assignment during meeting and/or Pause peer review assignment during meeting
--> If you are pausing peer review assignment, the event needs to be created on the day/time peer reviews are assigned out (weekly or monthly)
8. Select Save Event



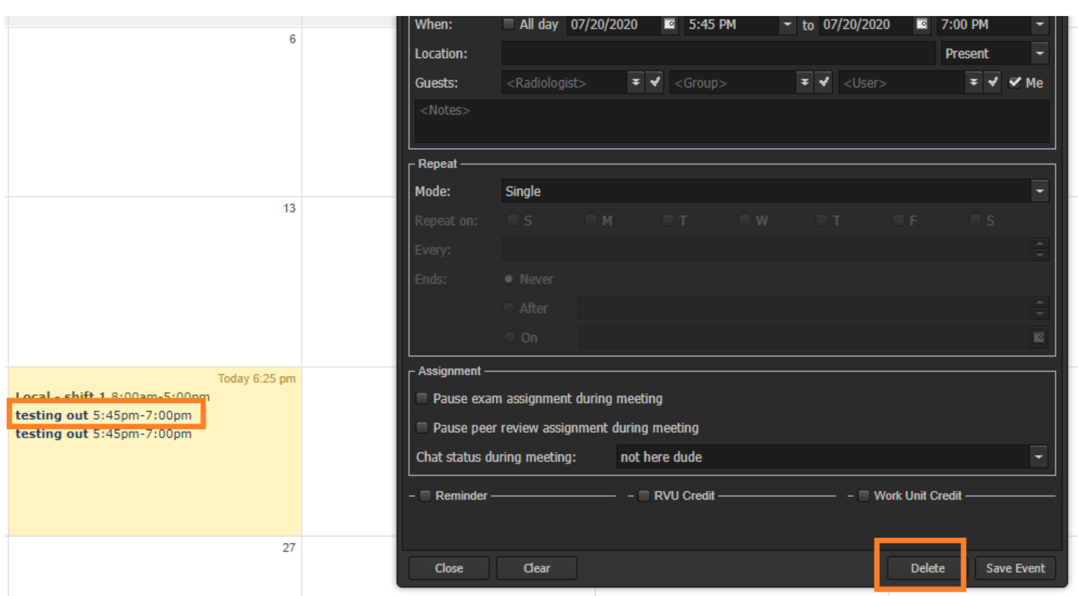
How to Edit a Manual Calendar Event

In order to edit a manual calendar event, simply select the event from the calendar. The pop out window will open up for the event. Make the needed changes to the calendar event and then select “Save Event”



How to Delete a Manual Calendar Event

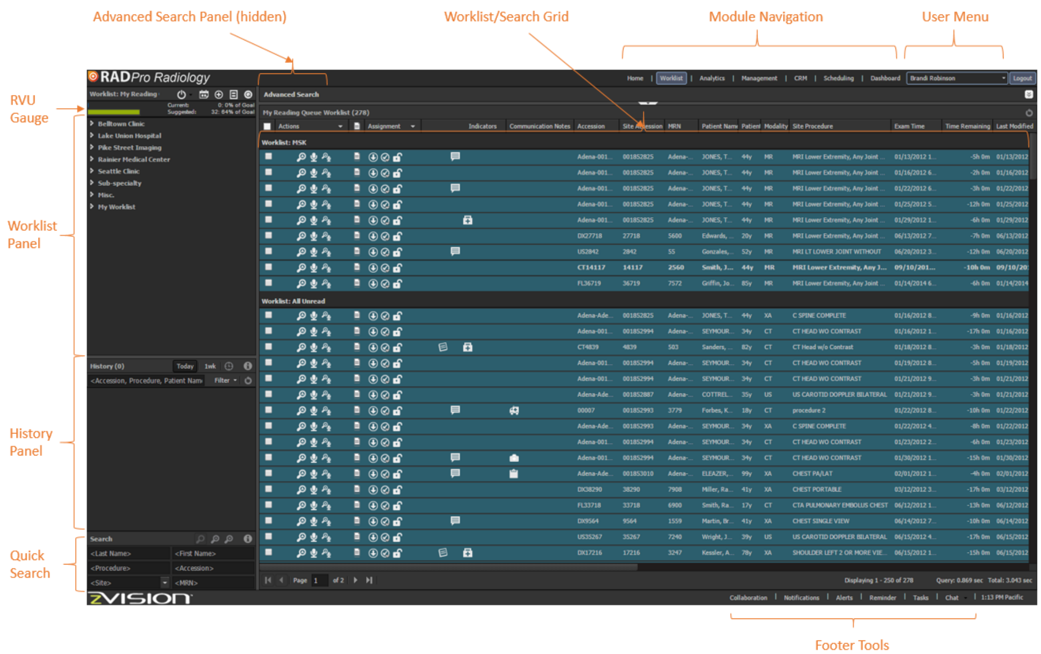
In order to delete a manual calendar event, simply select the event from the calendar. The pop out window will open up for the event. Select "Delete".



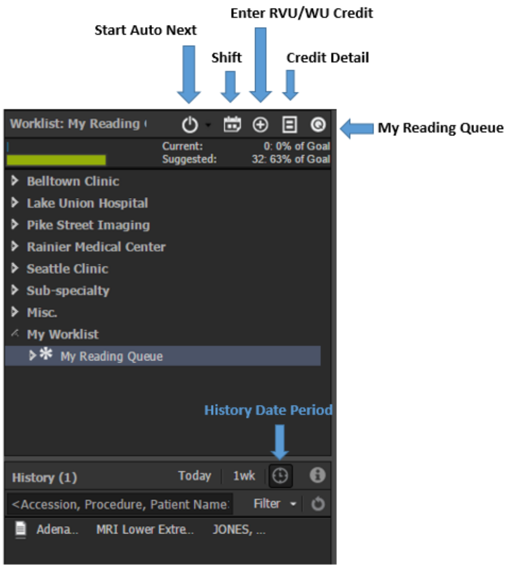
Worklist

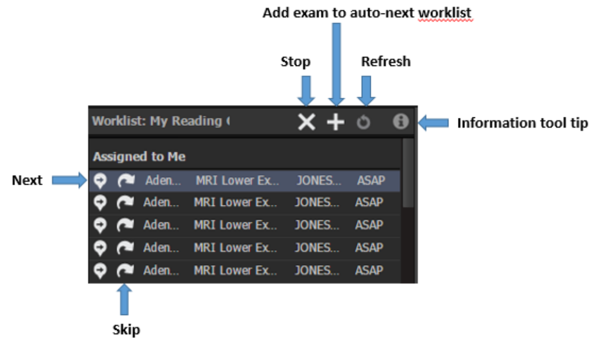
Overview of Worklist Page Layout

The worklist page is divided into panels. The diagram below describes the panels on your worklist page.



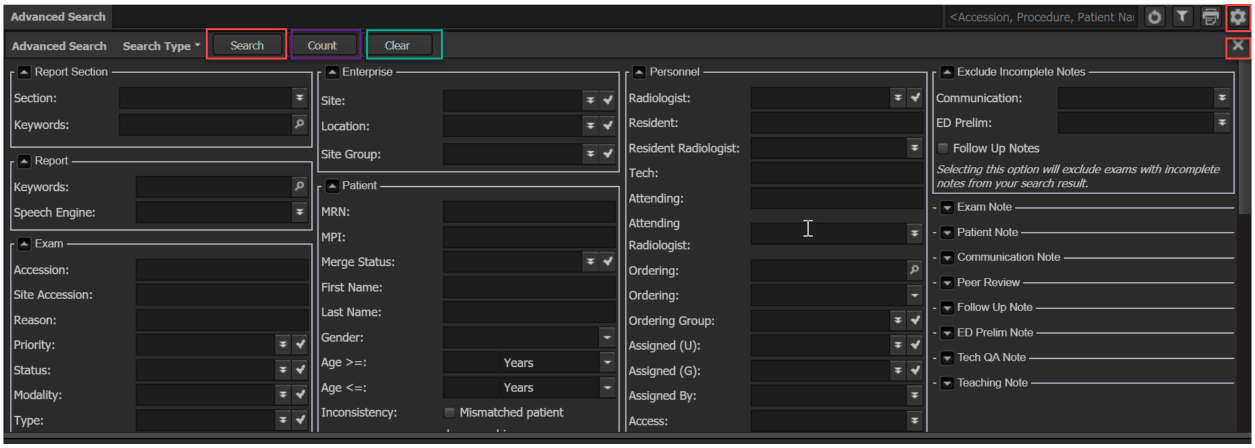
The screenshots below display Clario's worklist, history and auto-next panel layouts.





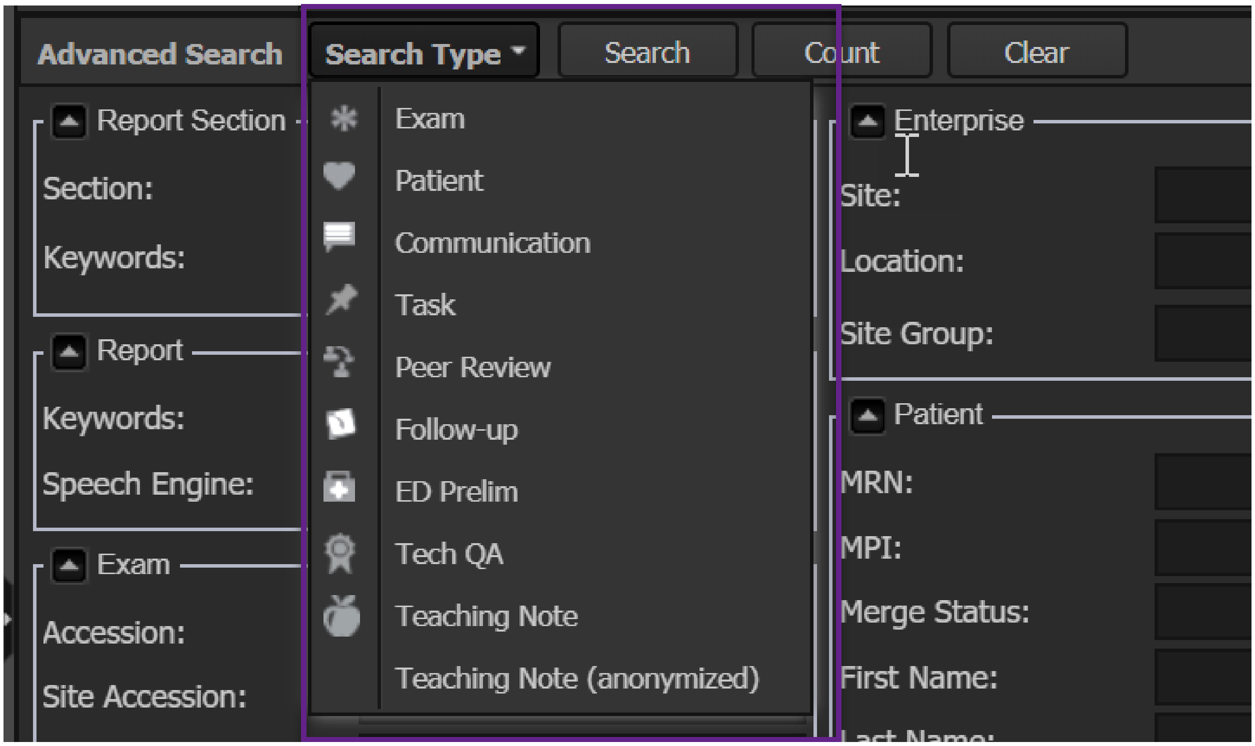
Advanced Search

Advanced Search is used to search exam criteria but also to create worklists. Worklsits are built using Advanced Search Filters.
Advanced Search within the Clario Smart Worklist hosts a variety of search options. The search options that you see in advanced search will be dependent on the version you are on. If you would like to add a search option, simply put in a ticket. There are some custom fields that can be added to your advanced search.
To find advanced search, click on the gear icon in the top right hand corner of the screen.
To minimize advanced search, click on the "x" below the gear.
To see how many exams your search filter will return, click "count".
To submit the search, click "search".
To clear all search parameters, click "clear".



There are ten 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. Patient - This search focuses on patient related search filters, such as name and patient age.
3. Communication - This search type searches for communication notes.
4. Task - This search type searches for task notes.
5. Peer Review - This search type searches for peer review notes.
6. Follow up - This search type searches for follow up notes.
7. ED Prelim - This search type searches for ED prelim notes.
8. Tech QA - This search type searches for tech QA notes.
9. Teaching Note - This search type searched for teaching notes.
10. Tech Note (anonymized) - This search type searches for teaching notes, but anonymizes the results.



How worklists are built using filters

Worklists in Clario are saved searches or saved filters of all the data in the Clario database. As the database changes, the worklists will be updated accordingly.

For example, a worklist defined to display ‘Unread CT’ will continuously update as the exam status changes. An exam will be removed from the list when the status changes from ‘Unread’ to ‘Final’ and an exam will be added when an exam status changes from a ‘Begun’ to ‘Unread.’ Similarly, a worklist that is defined to show ‘Today’s MRI’ will display all the MRI for the current day.

There are two types of worklists: Group Worklists and My Worklists. Group Worklists are defined and managed by Admin users and are available to all Clario users. My Worklists is a listing of worklists defined and managed by each individual user. These worklists are not shared with all users.

Worklists are created with the Advanced Search function. Using the search parameters, you can define any search you’d like. These searches can be based on:

- Exam information, including modality, procedure keyword, and status.
- Patient information, including age, gender and specific identity.
- Enterprise, if you’re reading for multiple sites or want to read for specific locations in the hospital.
- Personnel, including ordering physician and technologist.
- A date range, using relative days or absolute dates.

How to create a worklist:

Open Advanced Search

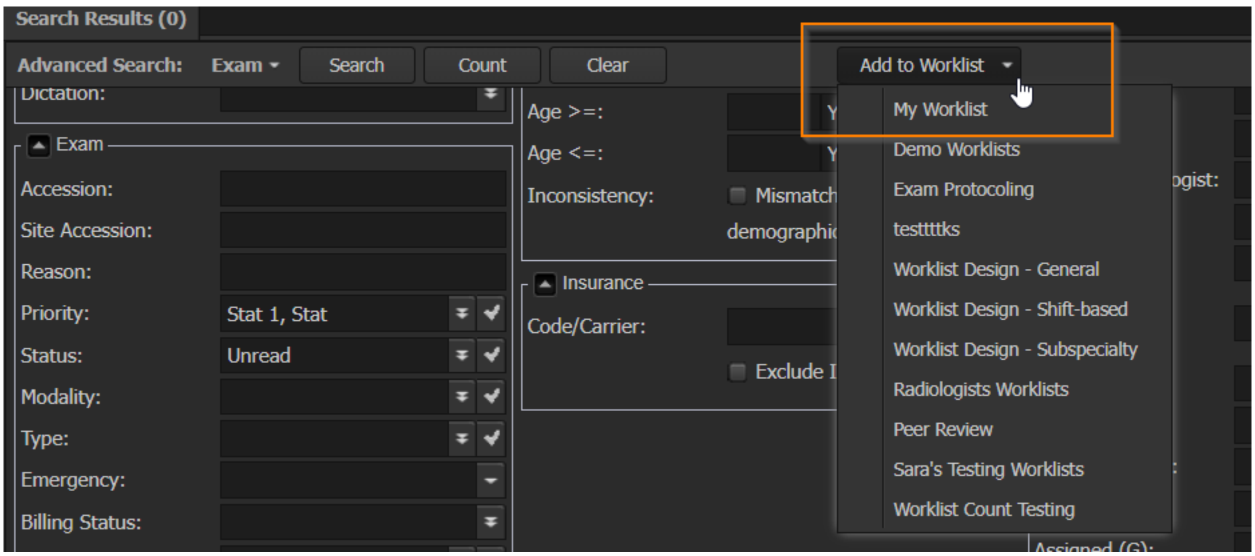
Select the filters needed to create your worklist

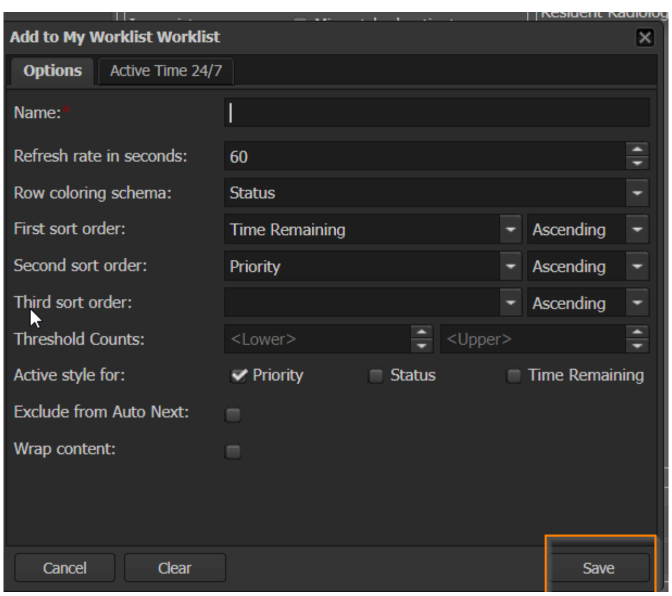
Select "Search"

Select "Add to Worklist" --> All users can have the option to add to "My Worklist". Users will only have the option to add to worklist groups if they have the "Create/Edit Group and Enterprise Worklist" permission.

Name the worklist and set the properties

Select "Save"



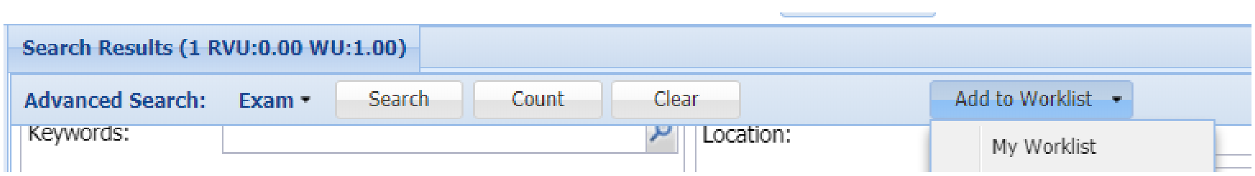


Worklist Tree

The Worklist Tree is found in the Worklist Panel of the Worklist Page (Left Hand Side of the Page). Within this panel, the worklists visible to the user are displayed. Worklist visibility is defined in the Worklist Groups Page. See the section "Worklist Group Configuration" for more information.

My Worklist

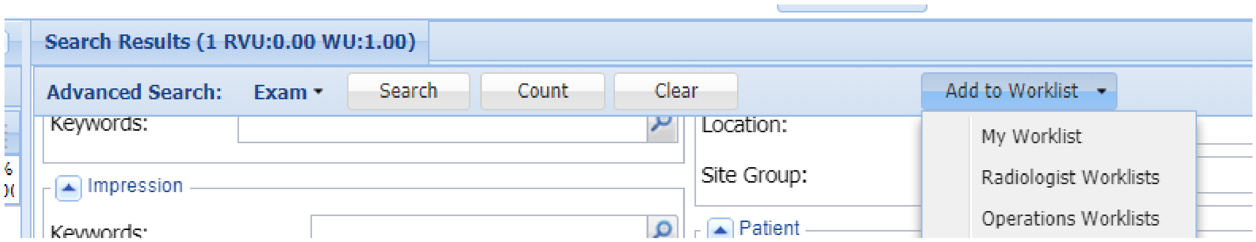
is specific to the logged in user. Thus if a user has the permission to create worklists they will be able to create their own worklists and store them under "My Worklist"



Again, if a user stores a worklist under "My Worklist" it will only be visible to that specific user.

Global Worklists

On the other hand, Global Worklist Groups are set up to manage and maintain types of worklists. If a user has the permission to create a Global Worklist and store it under the appropriate Worklist Group Category, they will be able to see that from their dropdown selection when saving the worklist.

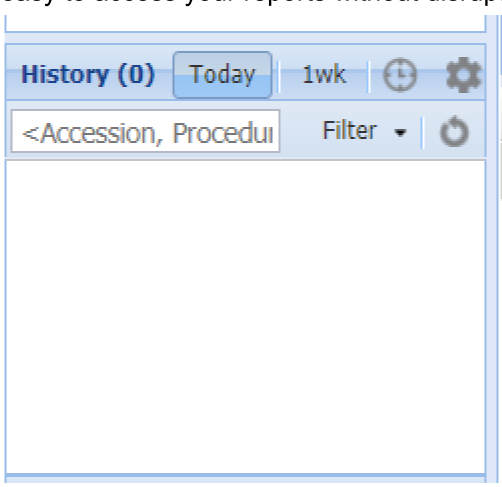


If a user does not have permission to create worklists, they will not have the ability to “Add to Worklist” when doing a search in advanced search.

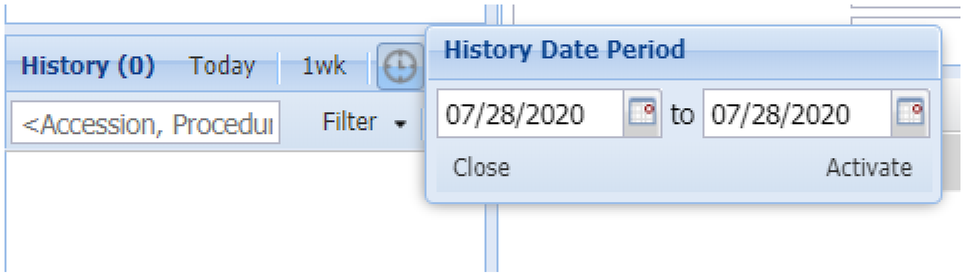
Sample Radiologist Worklists and Operations Worklists are Worklist Groups that are configured for Clients. Going forward, additional worklist groups may be configured to continue organizing specific worklists within the system. Worklist Groups are maintained in the Configuration section. Please refer to the Worklist Group Configuration section of this module for more information.

History

The History Panel lists all of the exams that you have somehow affected. Typically, for the radiologist, this means that you dictated the report. Therefore, the History panel is a listing of the exams for which you have dictated the report. However, any change that you make to an exam will result in the exam showing up in your history. This includes adding notes or changing exam information. The History panel makes it easy to access your reports without disrupting your current work.



You can set a date range using the quick links, or enter a specific date range.

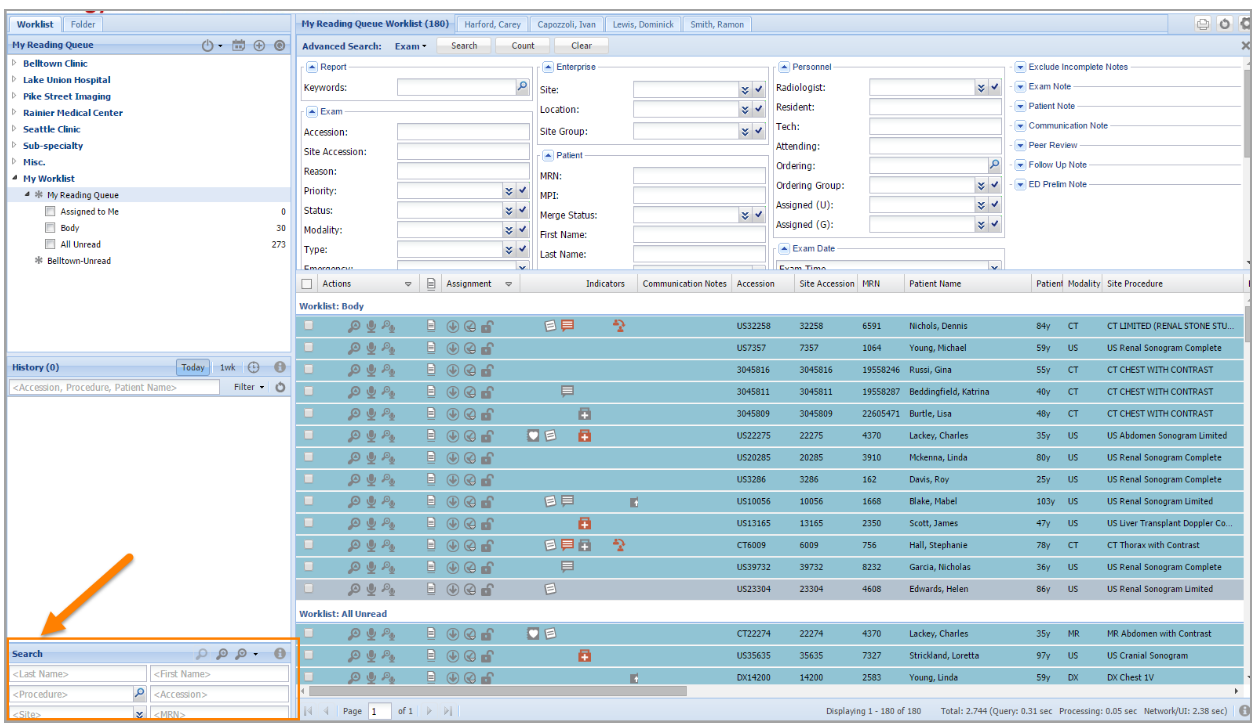


You can use the filter/search box to quickly search for patient name, accession, or procedure keywords.

The History panel also includes indicator icons, which will show any exams in your history that have outstanding tasks to be completed. These can include waiting communications, reports needing signature, etc. You can customize these icons in your User Preferences.

Quick Search

Often times customers need to find an exam in the worklist quickly. Clario accommodates this need with the "Quick Search" feature located on the bottom left part of the screen when viewing the worklist.



The Search Bar has 3 magnifying glasses (one with a drop down of options for the user).

Quick Search Magnifying Glass

The first magnifying glass initiates "Quick Search" when selected. This will not become "active" for search until search criteria is entered into one of the search fields.

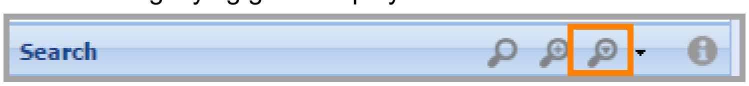
Note: The user can simply press "Enter" on his/her keyboard to activate the "Quick Search" as well.

Advanced Search Magnifying Glass

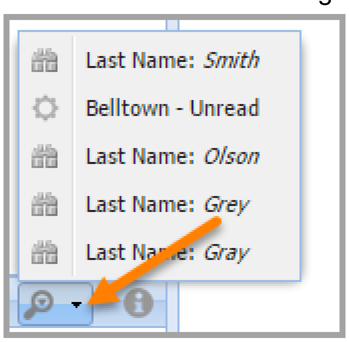
The second magnifying glass opens up the "Advanced Search" table when selected.

Last Search Magnifying Glass

The third magnifying glass displays the data for the "Last Search" the user completed when selected.



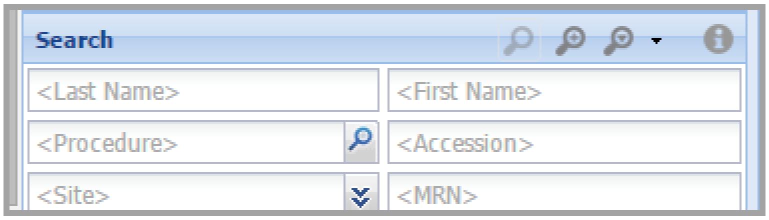
The dropdown will display a list of the most recent searches the user performed. The user is then able to select which search to navigate back to.



Quick Search Fields

Within "Quick Search" the user is able to perform a variety of searches:

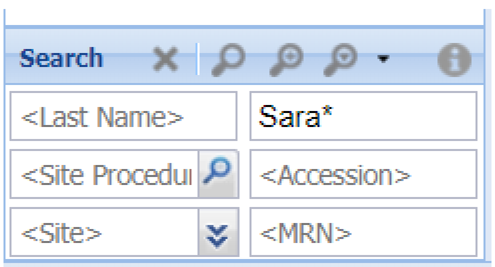
- Last Name
- First Name
- Procedure
- Accession
- Site
- MRN



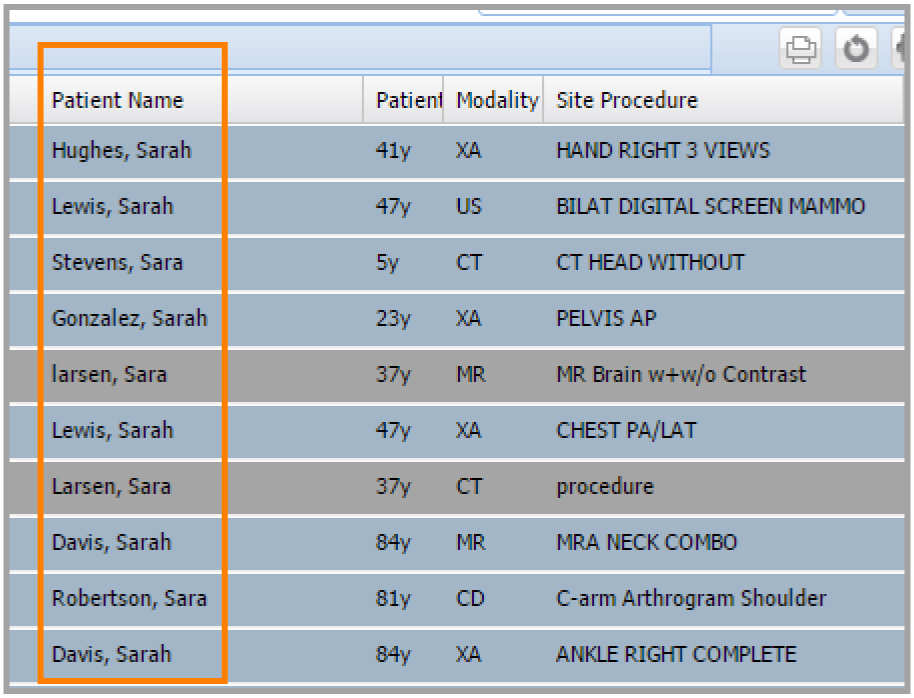
Note: Remember the "Quick Search" magnifying glass will not show "active" until data is entered into the search fields.

- Last Name and First Name:

These fields use exact character search. To use a wildcard search, you must use a * after Sara to search for Sara or Sarah*.



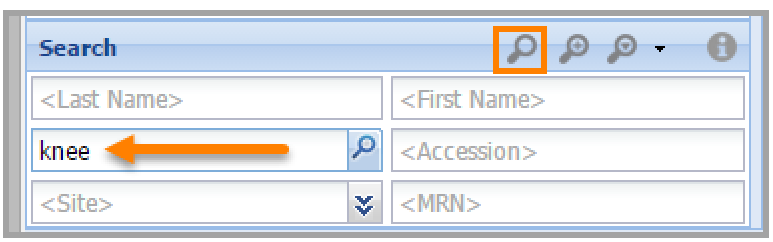
As you can see below, any patients with the first name Sara or Sarah display in the worklist to the right of the "Quick Search" when searching for "First Name" Sara*.



Patient Name	Patient	Modality	Site Procedure
Hughes, Sarah	41y	XA	HAND RIGHT 3 VIEWS
Lewis, Sarah	47y	US	BILAT DIGITAL SCREEN MAMMO
Stevens, Sara	5y	CT	CT HEAD WITHOUT
Gonzalez, Sarah	23y	XA	PELVIS AP
larsen, Sara	37y	MR	MR Brain w+w/o Contrast
Lewis, Sarah	47y	XA	CHEST PA/LAT
Larsen, Sara	37y	CT	procedure
Davis, Sarah	84y	MR	MRA NECK COMBO
Robertson, Sara	81y	CD	C-arm Arthrogram Shoulder
Davis, Sarah	84y	XA	ANKLE RIGHT COMPLETE

- Procedure:

This field search uses an exact match to words in the procedure name. Wildcard search is not available in this field. A search on knee will not return knees.

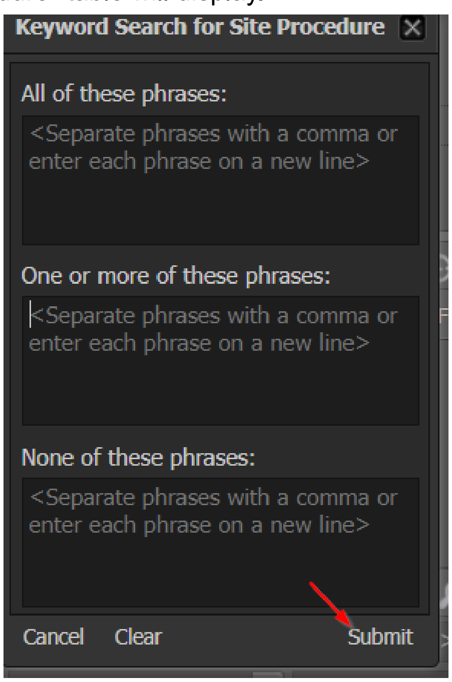


As you can see below, any patients with the exam "Site Procedure" of knee display in the worklist when searching for "Procedure" knee.

Patient	Modality	Site Procedure
47y	XR	knee
15y	XA	KNEE RIGHT 4 VIEWS
29y	XA	KNEE RIGHT 4 VIEWS
4y	XA	KNEE RIGHT 4 VIEWS
18y	XA	KNEE RIGHT 4 VIEWS
21y	XA	KNEE RIGHT 4 VIEWS
96y	XA	KNEE RIGHT 4 VIEWS
100y	XA	KNEE RIGHT 4 VIEWS
70y	XA	KNEE RIGHT 4 VIEWS
93y	XA	KNEE RIGHT 4 VIEWS
91y	XA	KNEE RIGHT 4 VIEWS
28y	XA	KNEE RIGHT 4 VIEWS
13y	XA	KNEE RIGHT 4 VIEWS

- Keyword Search for Procedure

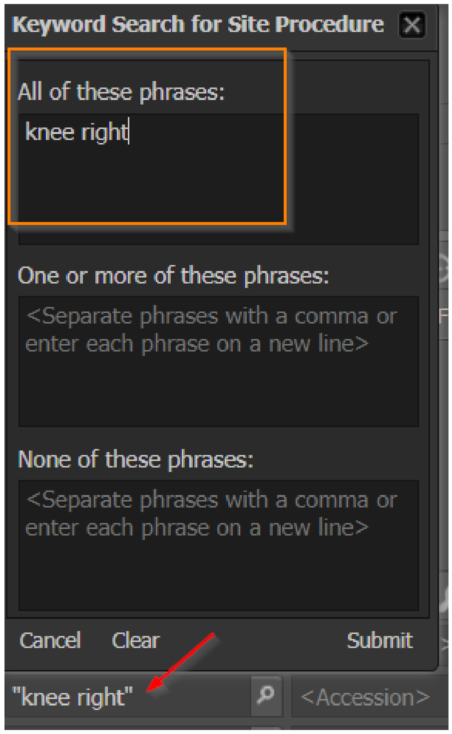
When selecting the small magnifying glass to the right of the "Procedure" field, the "Keyword Search for Procedure" table will display.



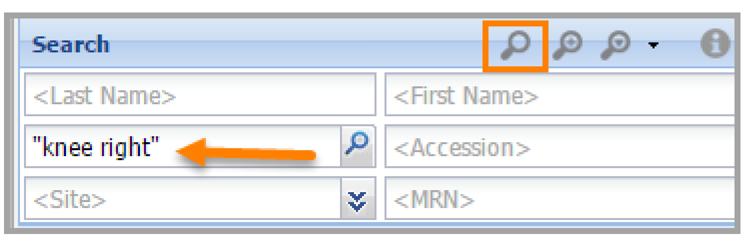
This table allows for searching with more specificity.

- *"All of these phrases:"*

When typing data into the "All of these phrases" field, the text will appear below in the "Procedure" search in quotation marks.

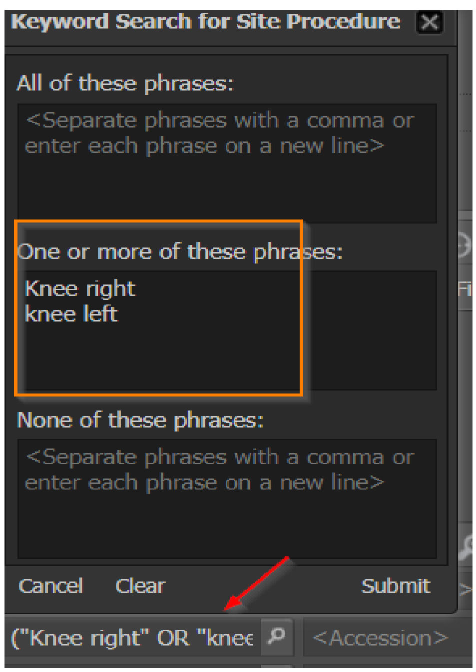


The user must then select "OK". The user now needs to initiate the search of the phrase by either selecting the appropriate magnifying glass or pressing enter on his/her keyboard.

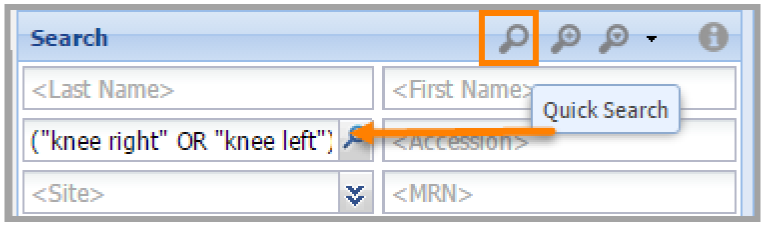


When searching via the phrase "knee right", all exams with the exam "Site Procedure" knee right will appear in the worklist when using the "Keyword Search for Procedure" "All of these phrases" filters.

- *"One or more of these phrases:"*
  - When typing data into the "One or more of these phrases" field, the text will appear below in the "Procedure" search in quotation marks within parentheses. Each phrase will be separated with the word "OR". However, when typing the phrases into the "Keyword Search for Procedure" table, each phrase must be separated with a comma.



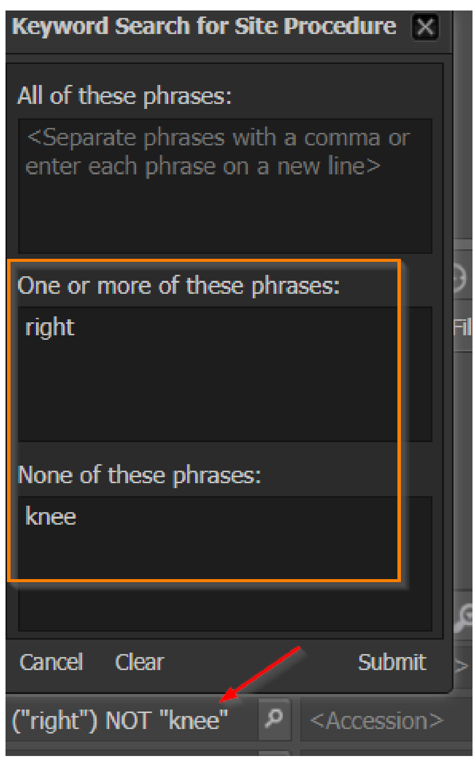
The user must then select "OK". The user now needs to initiate the search of the phrase by either selecting the appropriate magnifying glass or pressing enter on his/her keyboard.



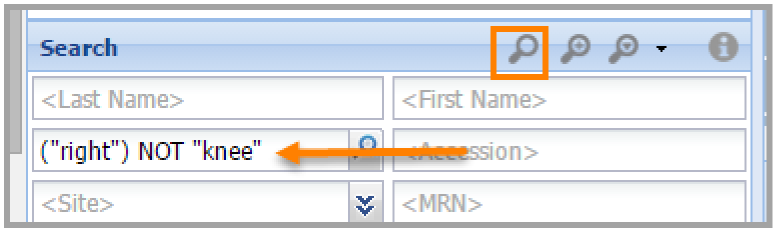
When searching via the phrase ("knee right" OR "knee left"), all exams with the exam "Site Procedure" knee right or knee left will appear in the worklist when using the "Keyword Search for Procedure" "One or more of these phrases" filters.

- *"None of these phrases:*

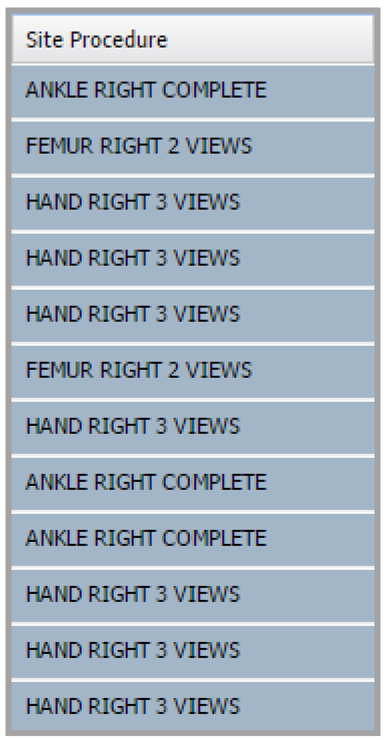
When typing data into the "None of these phrases" field, the text will appear below in the "Procedure" search in quotation marks preceded by the word NOT.
For the sake of this training, we are going to search based on the following criteria: to include the phrase "right" but not to include the phrase "knee".



The user must then select "OK". The user now needs to initiate the search of the phrase by either selecting the appropriate magnifying glass or pressing enter on his/her keyboard.



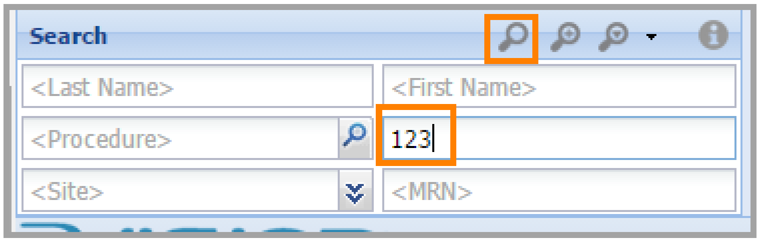
When searching via the phrase ("right") NOT "knee": (includes the phrase right excludes the phrase knee), all exams with the exam "Site Procedure" right will appear in the worklist and no exams with the "Site Procedure" knee will appear in the worklist when using the "Keyword Search for Procedure" "One or more of these phrases"/ "None of these phrases" filters.



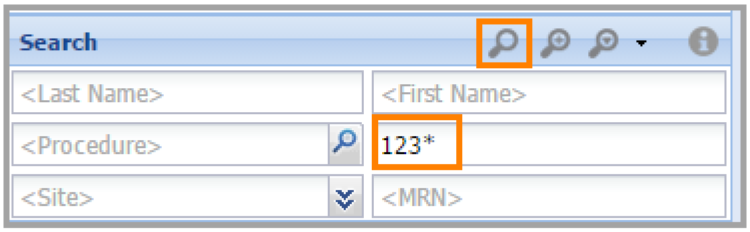
- Accession and MRN :

These fields use an exact match by default. You may use the * operation to conduct a wildcard search. An accession search on 123 will return exams with an exact accession of 123. A search on 123* will return all exams with accessions beginning with 123. The same is true for MRNs

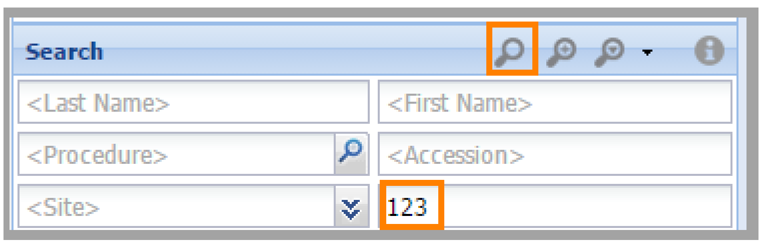
Exact Accession search of 123

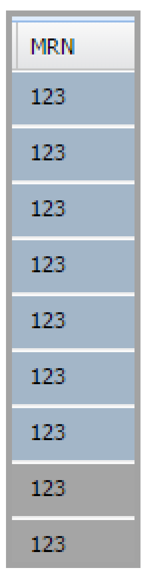


Accession search of exams beginning with Accession 123

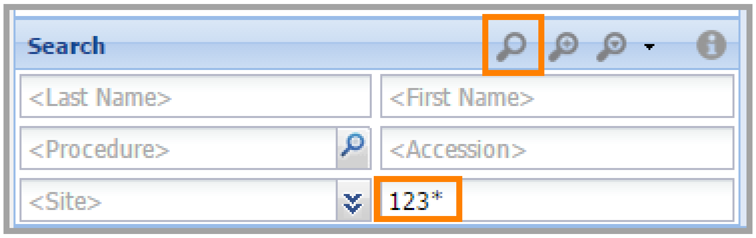


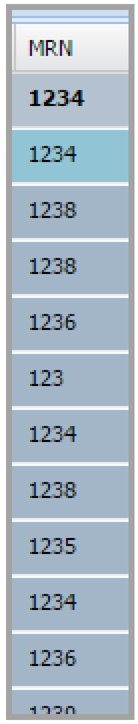
Exact MRN search of 123





MRN search of exams beginning with MRN 123

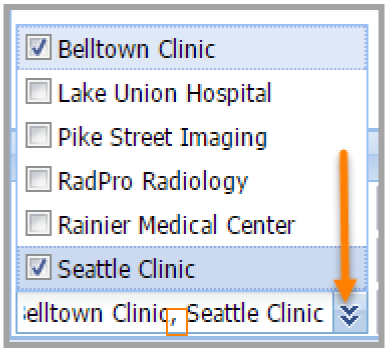




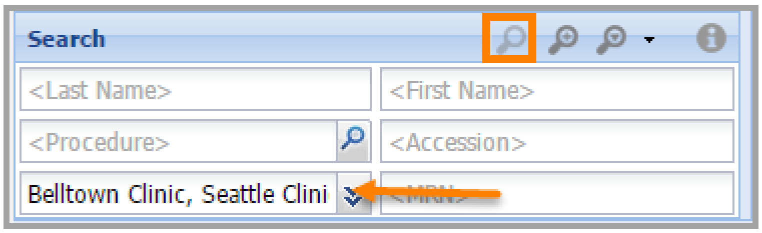
- Site:

The site field allows the user to select from a dropdown which site(s) he or she would like to view exams from. The user must have access to the sites, which is configured in the "User Management" section of Clario

By selecting the dropdown arrow, the list of sites the user is credentialed at appears. The user is able to select as many sites he or she wishes to view exams from. Each site will be separated by a comma below. If no sites are checked, then that means "all sites" are selected when the search is initiated.



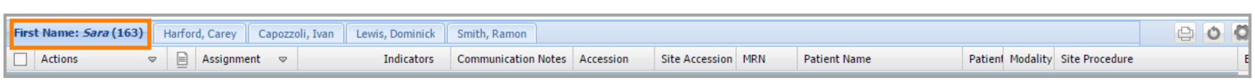
The user must then select "OK". The user now needs to initiate the search of the phrase by either selecting the appropriate magnifying glass or pressing enter on his/her keyboard.



When searching via the sites selected, the exams from selected site(s) will appear in the worklist to the right of the "Quick Search" table.

How to double check search criteria on the worklist

Users are often so busy that they forget what it was that they last searched for. A simple way to see the criteria that was searched for, and the number of exams meeting that criteria, is to look at the top of the worklist displayed.
In the upper left portion of the worklist, the search criteria as well as number of exams meeting that search criteria is displayed:



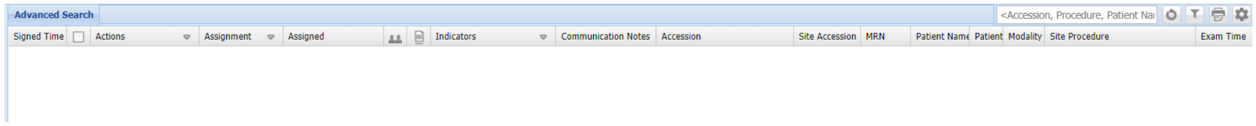
Here the user is able to see that when performing the "First Name" search of Sara, 163 exams display in the worklist.

Worklist Layout

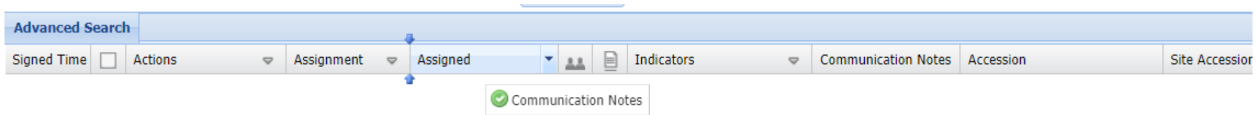
Column Configuration

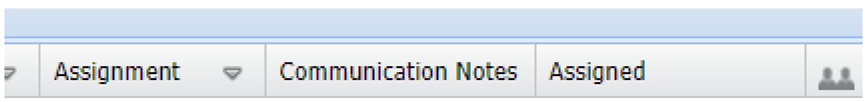
The worklist itself is completely configurable per user. Meaning, radiologists are able to drag, drop, and expand columns visible to them to their liking.

As you can see in the screenshot below, the columns are currently displayed the following way.



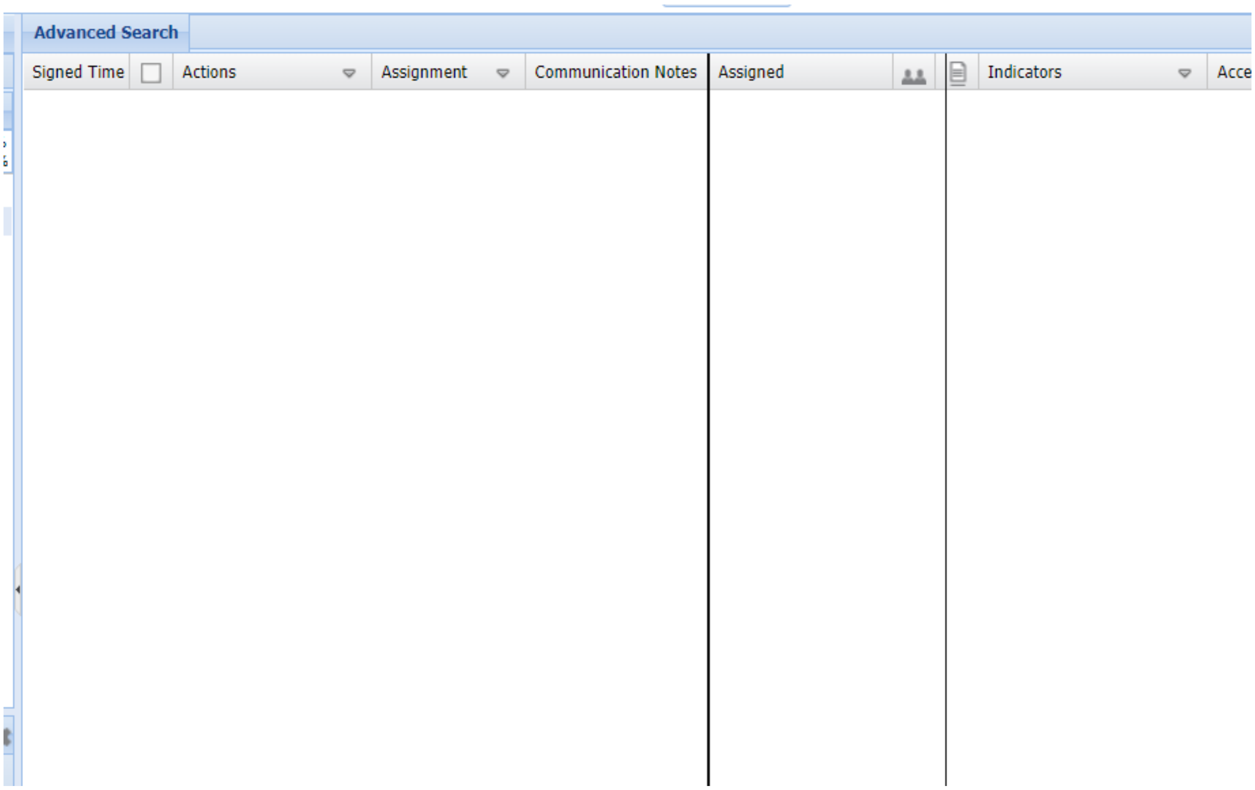
A user is able to drag and drop columns to the order they would like.
Grabbing the Communication Notes Column and dragging it over and dropping it in between "Assignment" and "Assigned" will result in the following:



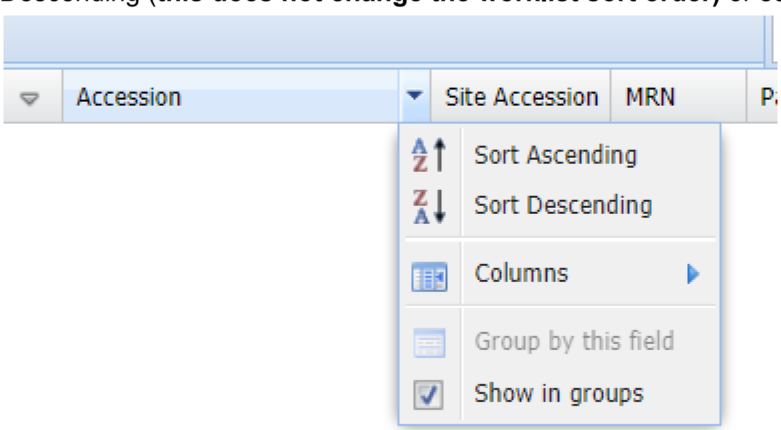


A user is also able to expand and minimize column width by hovering over the bars in between columns until the following indicator appears:

Dragging the column widths allows the user to expand or minimize the column to their liking.

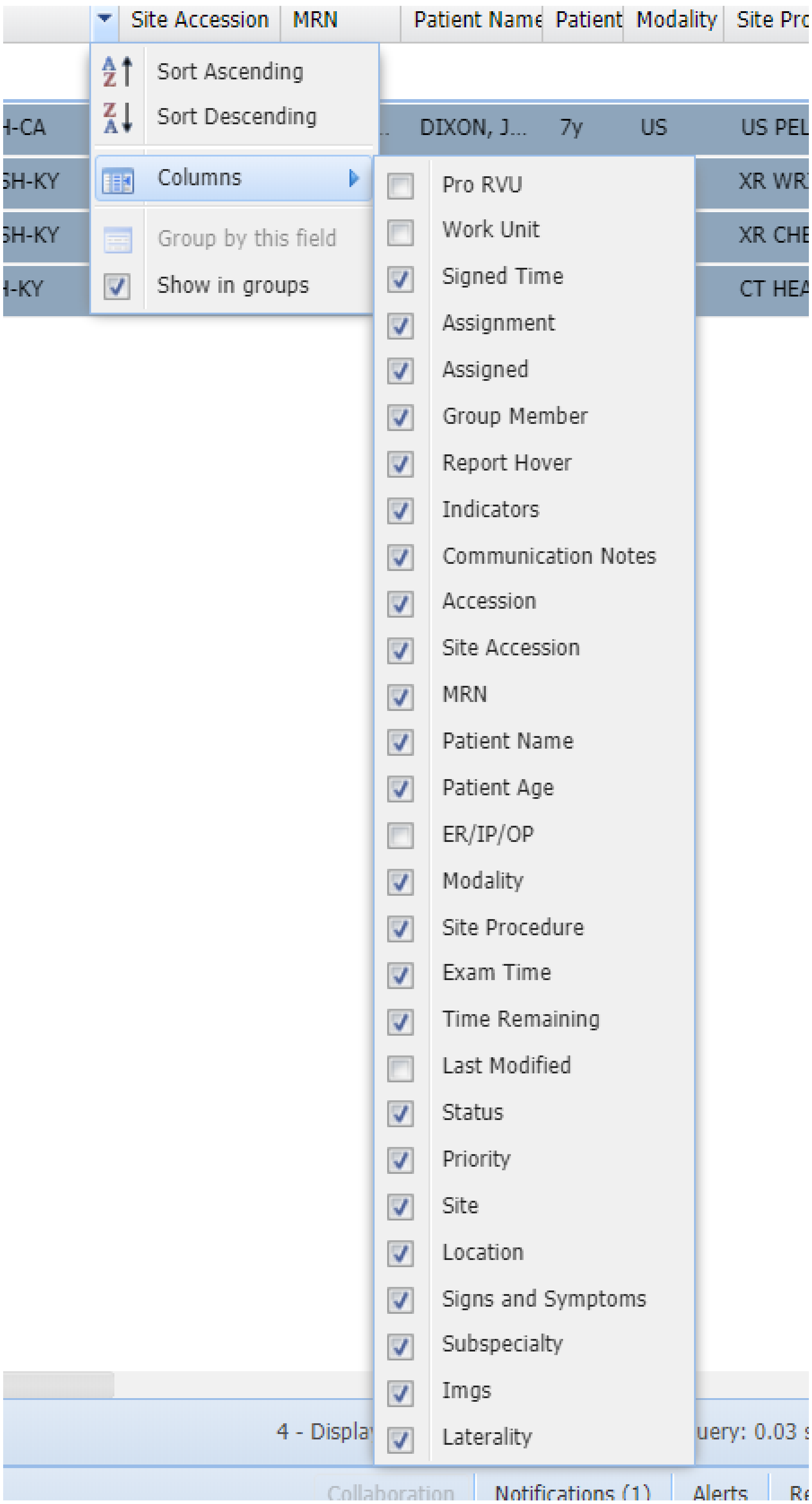


The user is also able to add and remove columns by selecting any carrot dropdown from the column headers OTHER THAN Actions, Assignment or Indicators. Selecting the carrot dropdown for those three columns will display different results. In the example below, we have selected the Accession column, and clicked on the carrot drop down. The user is able to sort the results on the page by Ascending or Descending (**this does not change the worklist sort order)** or select “Columns”.

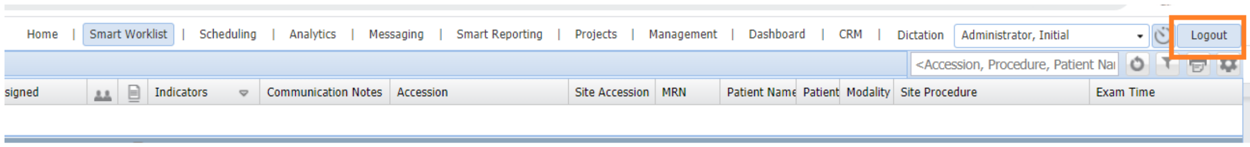


When “Columns” is selected, the currently visible columns available will appear in a table to the right. All column headers with a checkbox next to them are currently visible. However, a user is able to uncheck or check appropriate boxes to remove or add columns to their liking. Again, this is a user role permission. Thus if you do not want users having the ability to add or remove columns, you will want to limit this permission in their associated user role.

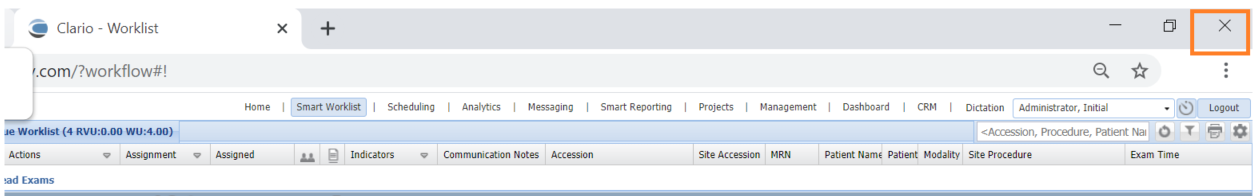
If there are columns that your practice needs to display but are not currently visible in the dropdown menu, contact the Clario Technical Support team to identify which columns need to be visible. This is something configured in the Configuration section of Clario, but must be configured with the help of a Clario Technical Support member, as the configuration page can break the system if not handled properly.


Site Accession
MRN
Patient Name
Patient
Modality
Site Pro
Sort Ascending
Sort Descending
Columns
Group by this field
Show in groups
DIXON, J...
7y
US
US PEL
XR WR
XR CHE
CT HEA
Pro RVU
Work Unit
Signed Time
Assignment
Assigned
Group Member
Report Hover
Indicators
Communication Notes
Accession
Site Accession
MRN
Patient Name
Patient Age
ER/IP/OP
Modality
Site Procedure
Exam Time
Time Remaining
Last Modified
Status
Priority
Site
Location
Signs and Symptoms
Subspecialty
Imgs
Laterality
4 - Displa
uery: 0.03
Collaboration
Notifications (1)
Alerts

All changes made to the layout and display of the worklist are saved per user when they select “Logout”. That is, if a user logs out at the end of the day, they will not need to make these changes again once logging in again, as the system will have saved all changes made.



If a user selects the red X in the upper right hand corner at the end of their day, their changes will not be saved.



Explanation of Column Functionality

Most columns are self explanatory regarding what they will display. The following is an explanation of the columns that may not be as intuitive for the end user:

Checkbox

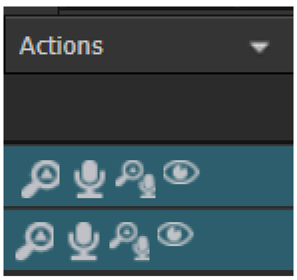
This column allows a user to check appropriate exam(s) to then perform an action on.

Actions

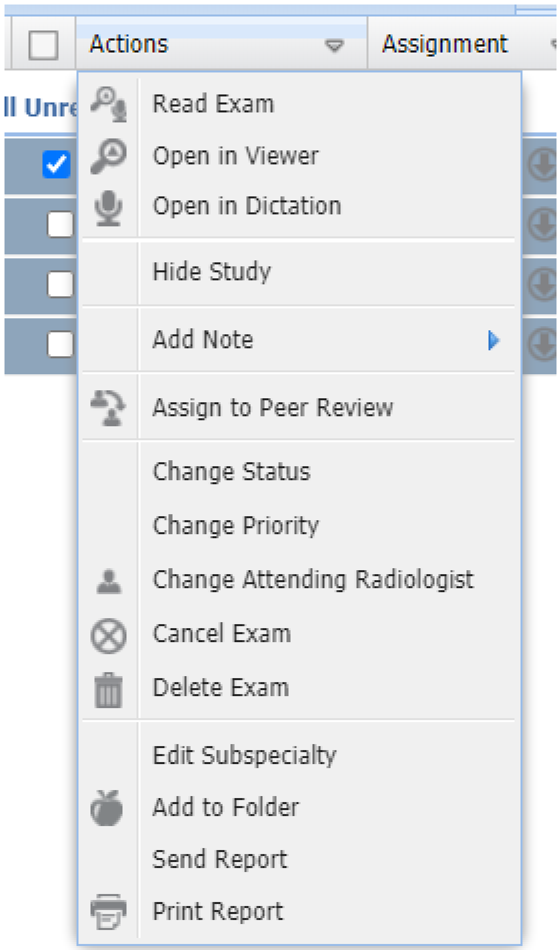
The action column in Clario is a special column that all radiologists will need to access.

The action column holds 4 different functions.

1. Open in dictation - The open in dictation will launch the exam in your dictation system only. 
2. Open in viewer - The open in viewer button will launch the exam in your viewer only. 
3. Read Exam - The read exams button will launch the exam within the viewer and dictation system. 
4. Hide Study - The hide study button will hide the study from launching auto next. It acts as a way to pre-skip exams before you start auto next. 

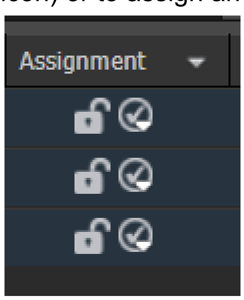


When selecting the carrot drop down in the Actions Column, the appropriate, predefined actions that are allowed to be taken on the exam based on the client's configurations as well as the exam's status will be displayed. This menu can also be displayed by right clicking in the line of the patient you want to perform the action on.



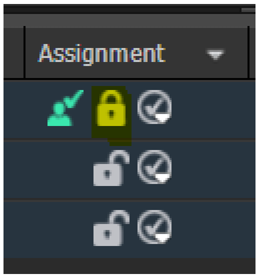
Assignment

The assignment column allows the user to either lock an exam to themselves (by selecting the lockbox icon) or to assign an exam to another user by selecting the circle icon with a checkmark in the middle.



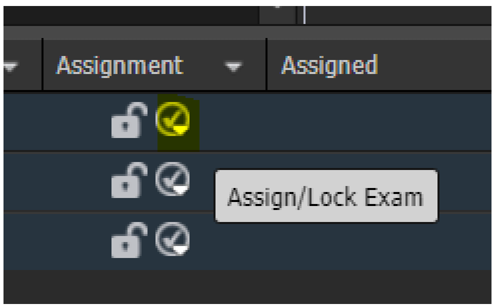
Assignment to oneself

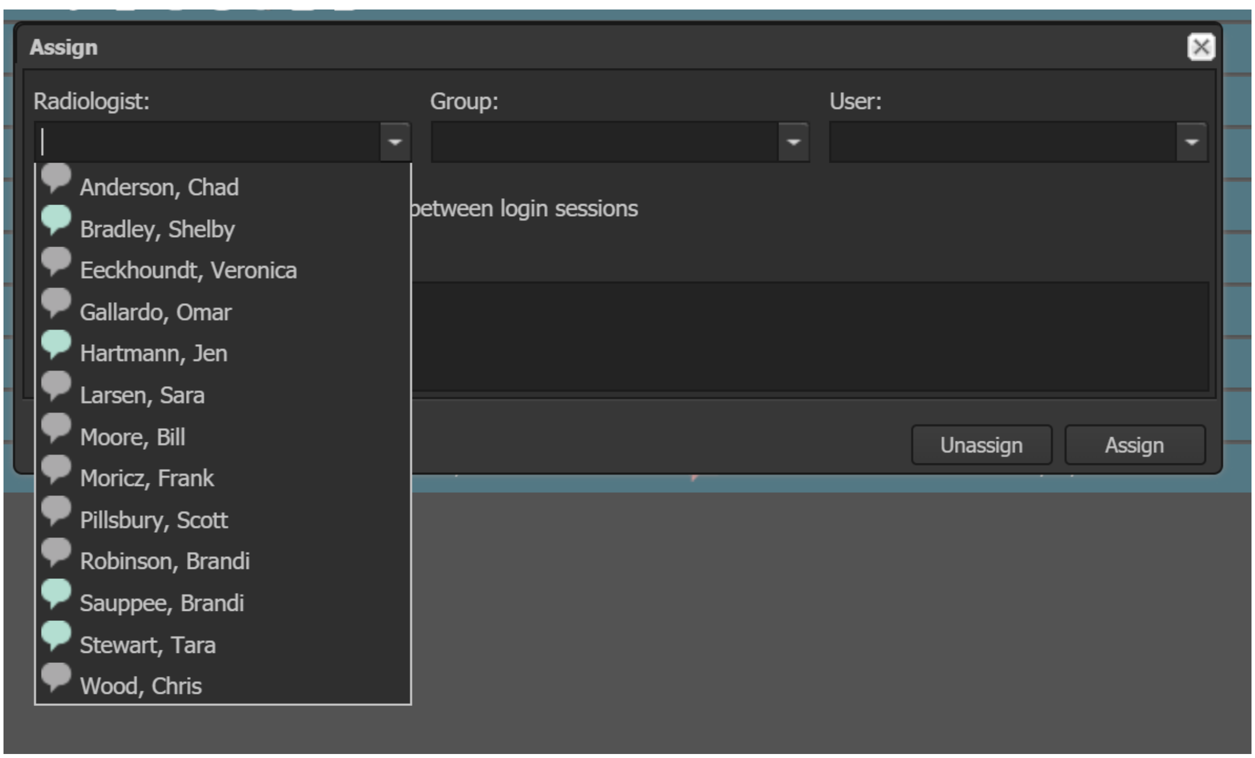
When the lockbox is selected to sign to oneself, the lockbox will appear “locked” and the green person icon to the left of the lockbox will appear green.



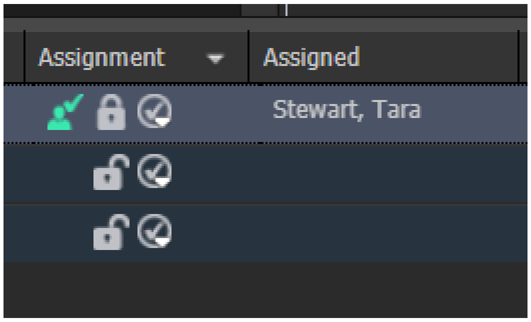
Assigning to another user

Selecting the Assign Icon will allow the user to assign or lock an exam to another user.

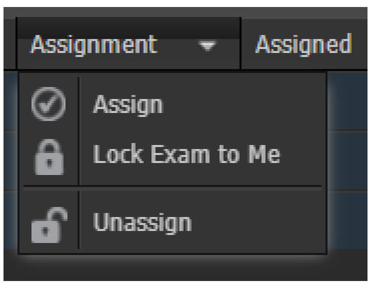




When the exam is assigned to a user, whether using the lockbox or the assign icon, the “Assigned” column will then display who the exam is assigned to.

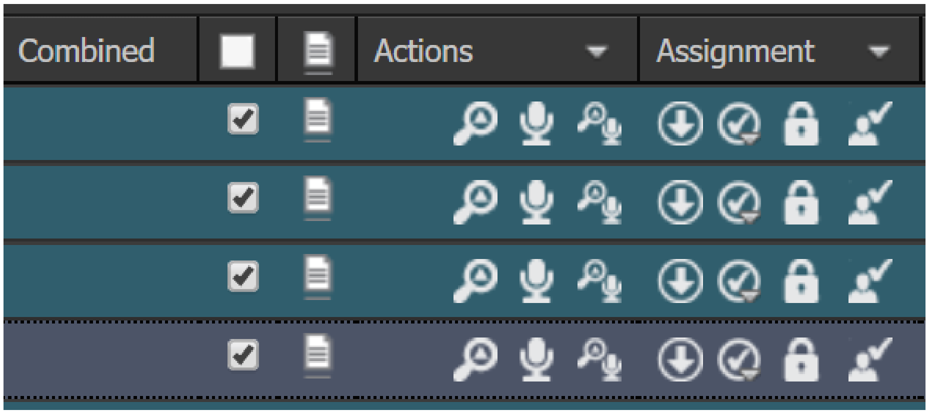


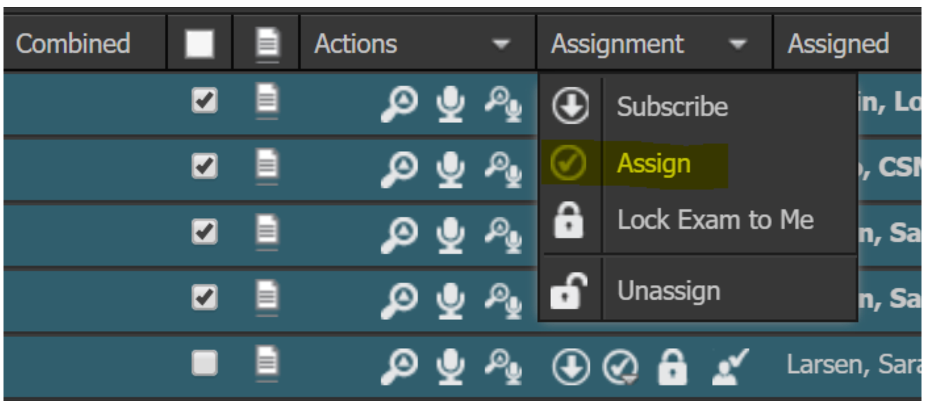
Selecting the carrot dropdown on the Assignment Column will display the applicable options for that specific exam. Depending on the status of the exam as well as what has been configured in the system, the options may vary.

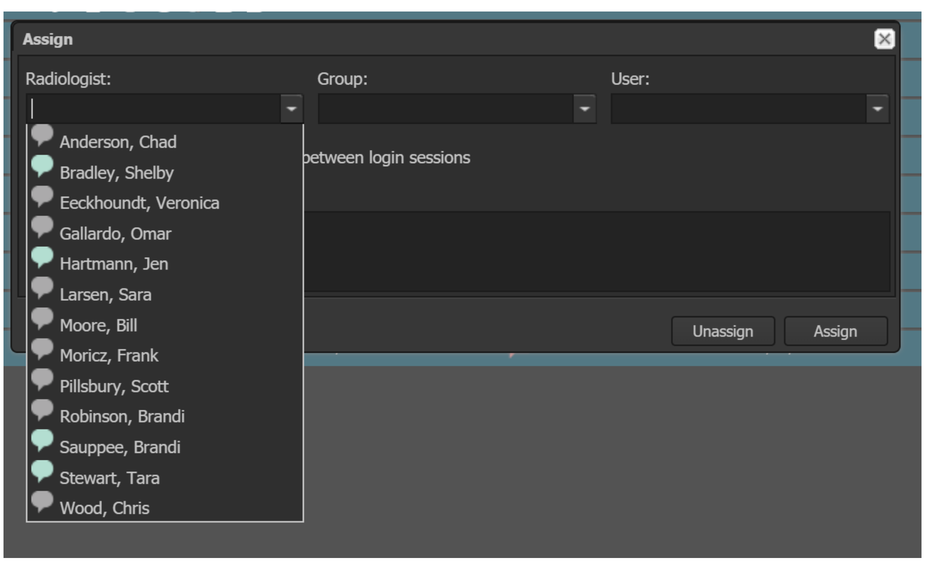


Batch assign/reassign an exam:

- Click the checkbox(s) next to the exam(s).
- Select the dropdown in the "Assignment" column header and select "Assign"
- Then select assignment by Radiologist, Group or User
- You can make the assignment persistent by checking "Make assignment persistent between login sessions". If you make an assignment persistent, this means the exam will stay assigned to that user whether they are logged in or not.
- To reassign, simply select "Assign" again and it will open the assignment pop up. Make any desired changes and click "Assign".

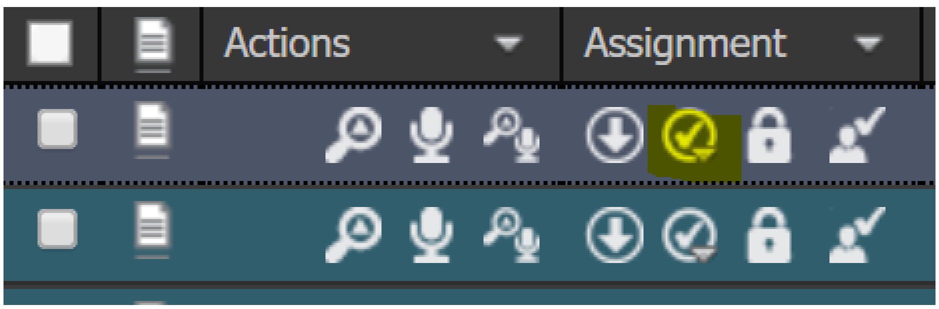

Combined
Actions
Assignment

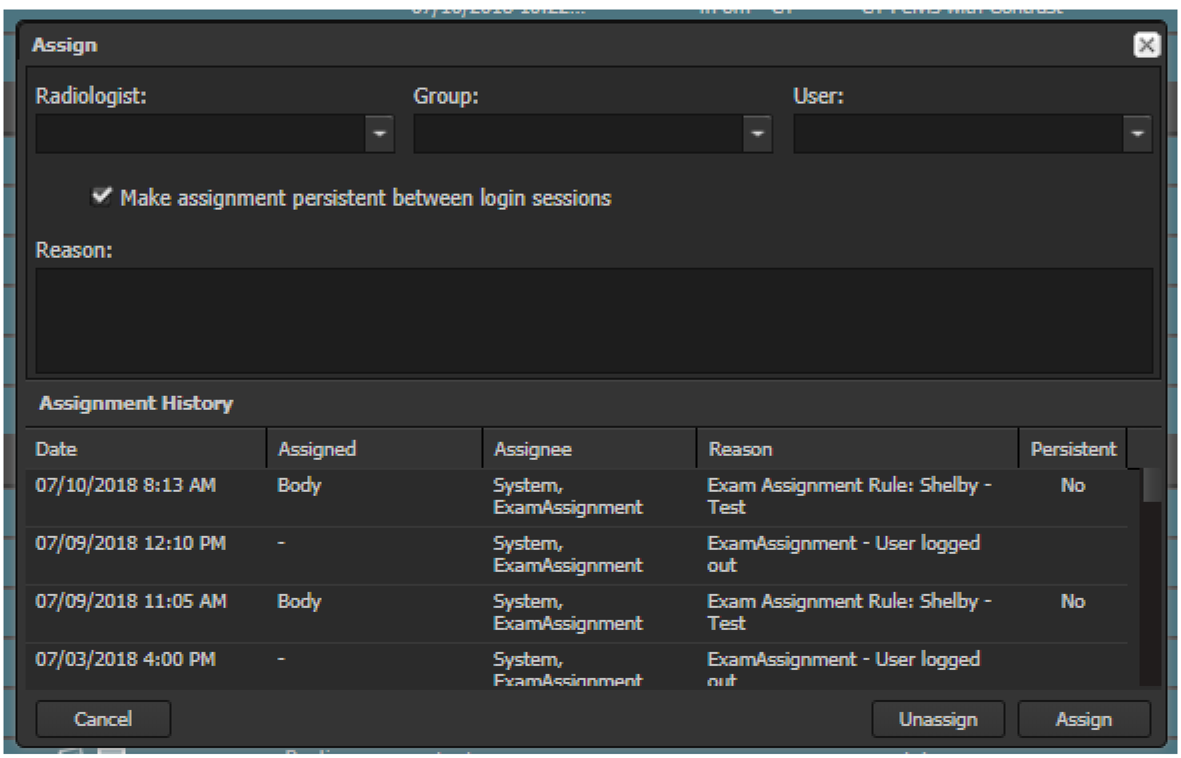

Combined
Actions
Assignment
Assigned
Subscribe
Assign
Lock Exam to Me
Unassign
Larsen, Sara


Assign
Radiologist:
Group:
User:
Anderson, Chad
Bradley, Shelby
Eeckhoundt, Veronica
Gallardo, Omar
Hartmann, Jen
Larsen, Sara
Moore, Bill
Moricz, Frank
Pillsbury, Scott
Robinson, Brandi
Sauppee, Brandi
Stewart, Tara
Wood, Chris
between login sessions
Unassign
Assign

Assign/reassign an individual exam:

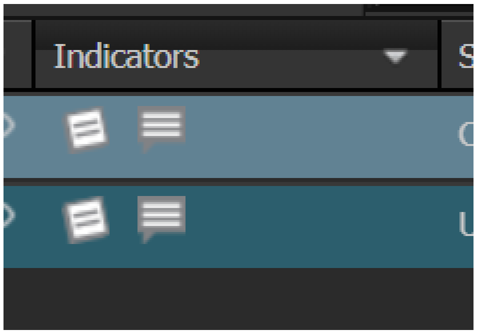
- Click the "Assign/Lock exam' circle-check icon for the individual exam to reassign
- Then select by Radiologist, Group or User and click "Assign". You can add a reason for assigning on this page and also see the exams assignment history.
- You can make the assignment persistent or non-persistent.
- To reassign, simply click the "Assign/Lock Exam" button again and it will open the assignment pop up. Make any desired changes and click "Assign".



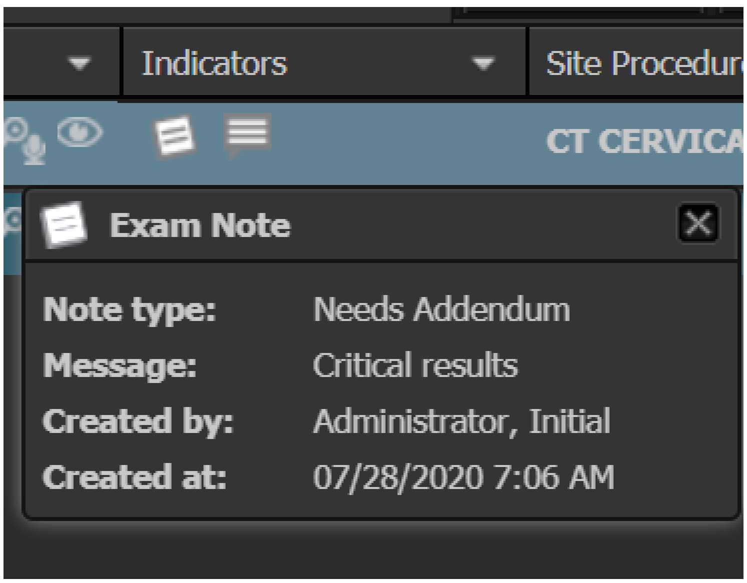


Indicators

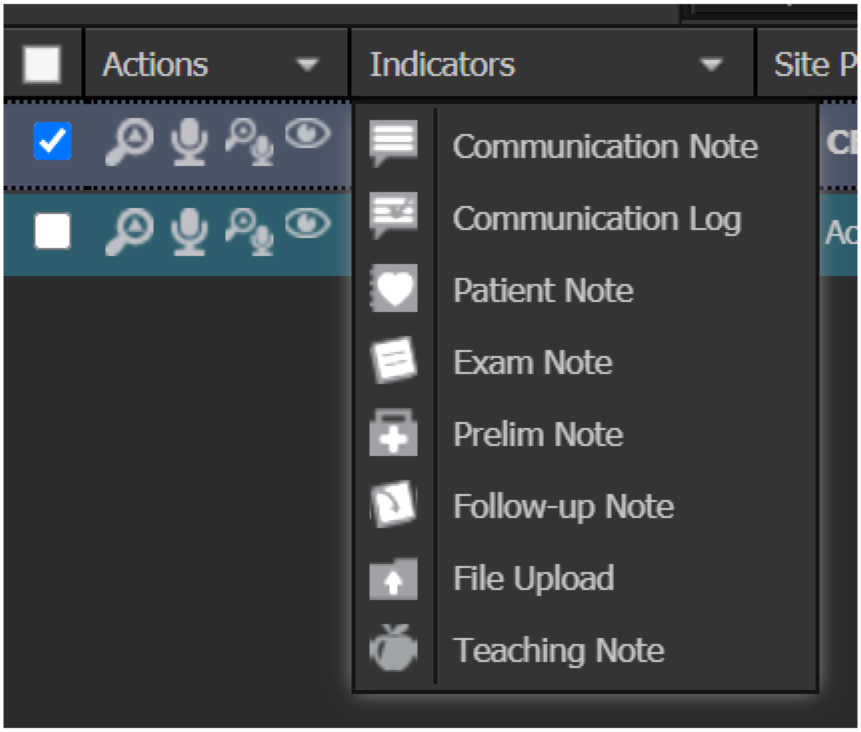
The Indicators column will display any notes on the exam in the system. This can be communication notes, exam notes, peer review notes, etc. The associated icon with the note type (which is configured in the configuration section of Clario) will display in the Indicators column. The color and style of the indicator is configurable.



Hovering over the indicator will display the note information. In the example below, we have hovered over the far left indicator, which is the Exam Note. The information on the Exam Note is displayed.



If an exam is selected in the checkbox column, and the user selects the carrot dropdown on the Indicators column, the appropriate indicators that have been configured will display. At this point, the user is able to create a “New” Indicator from here, if the user role permission is enabled to do so.

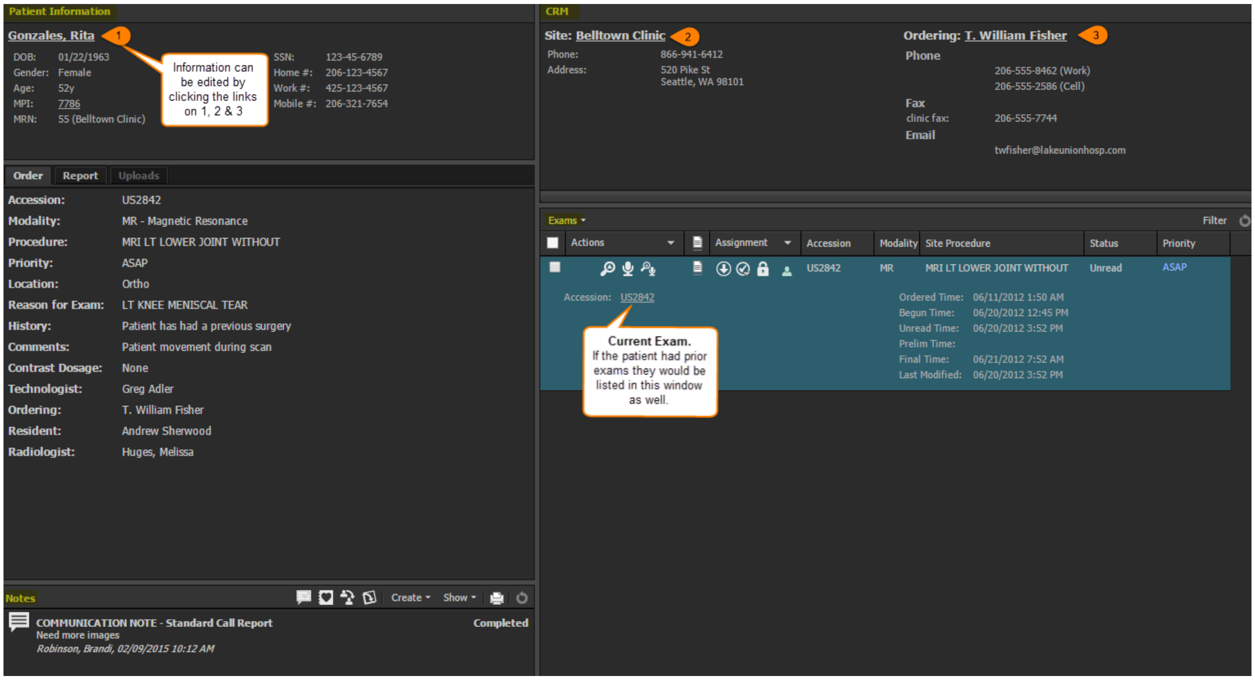


Patient View

Patient View will open when you select an exam (single click to view or double click to read). The Patient View will display all of your patient and exam information in one view. There are five panels in Patient View:

- Patient Information
  - This panel contains patient information, demographics and contact information. The information displayed is configurable.
- Order/Report
  - This panel will display the order information for exams that do not yet have a report. The information included in this panel is configurable. Once there is a report associated with the exam, it will be displayed here. You can easily tab between order and report.
- Notes
  - This panel displays all the notes associated with the exam. The notes are sorted with the most recent at the top. In this panel you can create new notes or edit/complete existing notes.
- CRM
  - This is the Customer Relationship Management panel. It will display information for your customer sites and ordering physicians that is captured in the CRM module.
- Exams
  - This is the listing of exams for the patient. The exam you selected from the worklist is also selected in the exams list. You can view any other exam by clicking it or using the report hover. If you are using Clario's MPI, you will see all the reports for this patient that

may be residing across multiple facilities. From this panel you can view exam history and edit exam information.



Worklists

Worklist Filters Explained

Worklists in Clario are saved searches or saved filters of all the data in the Clario database. As the database changes, the worklists will be updated accordingly.

For example, a worklist defined to display ‘Unread CT’ will continuously update as the exam status changes. An exam will be removed from the list when the status changes from ‘Unread’ to ‘Final’ and an exam will be added when an exam status changes from a ‘Begun’ to ‘Unread.’ Similarly, a worklist that is defined to show ‘Today’s MRI’ will display all the MRI for the current day.

There are two types of worklists: Group Worklists and My Worklists. Group Worklists are defined and managed by Admin users and are available to all Clario users. My Worklists is a listing of worklists defined and managed by each individual user. These worklists are not shared with all users.

Worklists are created with the Advanced Search function. Using the search parameters, you can define any search you’d like. These searches can be based on:

- Exam information, including modality, procedure keyword, and status.
- Patient information, including age, gender and specific identity.
- Enterprise, if you’re reading for multiple sites or want to read for specific locations in the hospital.
- Personnel, including ordering physicians and technologists.

- A date range, using relative days or absolute dates.

How to create a worklist:

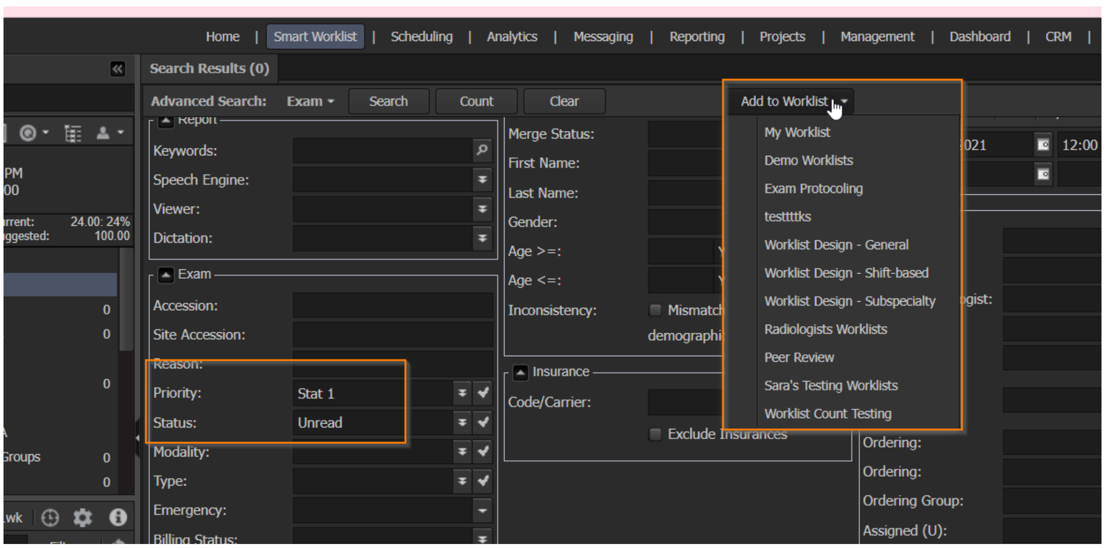
Open Advanced Search

Select the filters needed to create your worklist

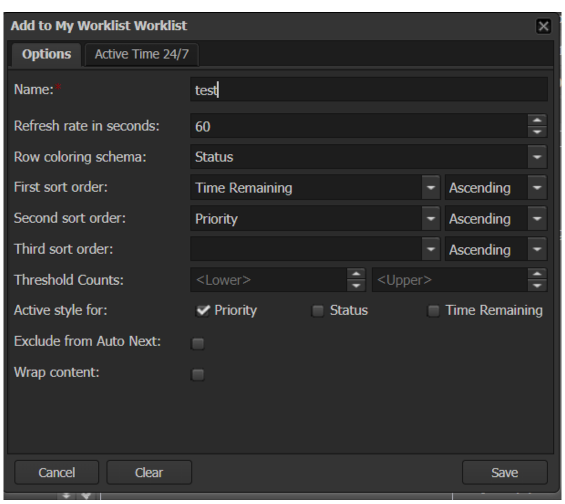
Select "Search"

Select "Add to Worklist" --> All users can have the option to add to "My Worklist". Users will only have the option to add to worklist groups if they have the "Create/Edit Group and Enterprise Worklist" permission.

Name the worklist and set the properties

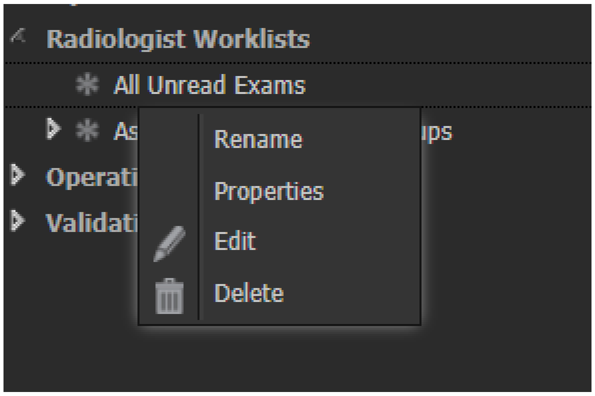


Select "Save"



How to Edit a Worklist

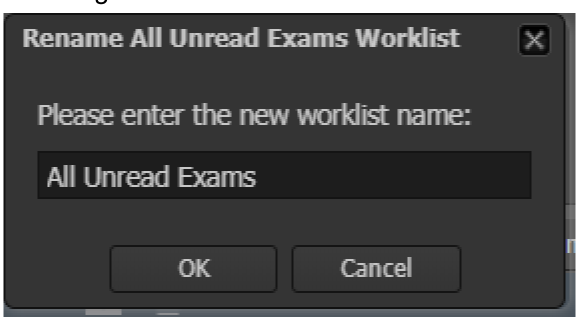
To edit a worklist, simply right click on the worklist to display the following options:



It is important to note that this is user role permission based, and also only available on a worklist that is NOT in My Reading Queue (MRQ).

Rename

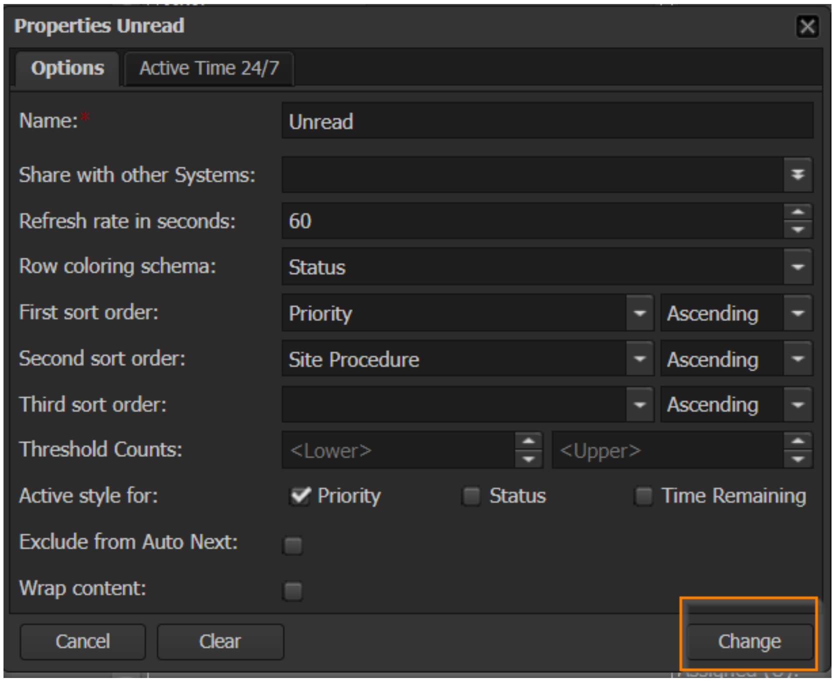
Selecting “Rename” allows the user to rename the worklist



If the worklist is a Global Worklist, the rename will be visible to all users.
Select OK when done renaming the worklist or cancel to cancel out.

Properties

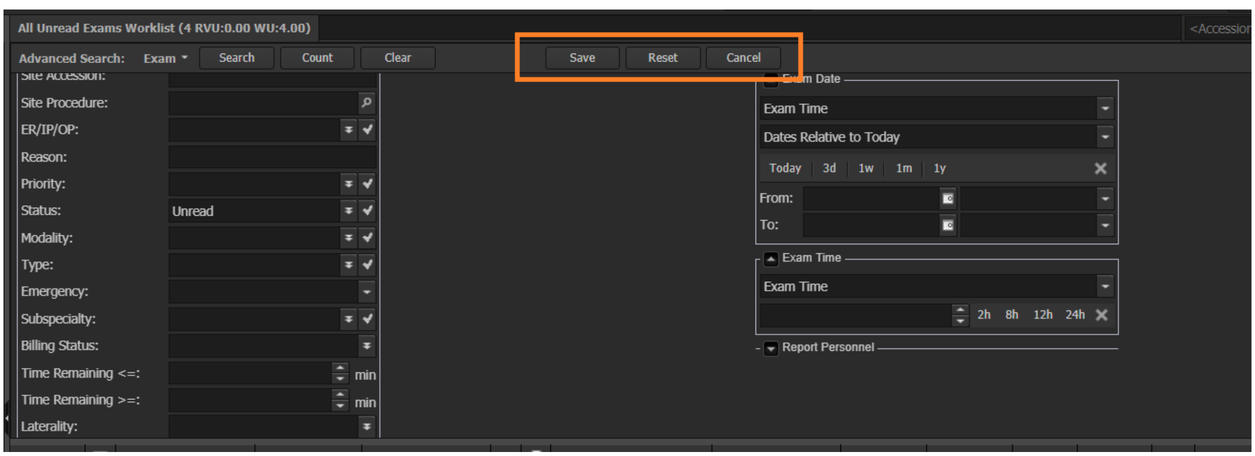
Selecting “Properties” displays the properties that were initially set up when the worklist was created.



If applicable, the user will have the ability to clear the properties and redefine all new properties, or make changes to the appropriate fields. Once complete, the user selects "Change" to save the changes, or selects "Cancel" to cancel out.

Edit

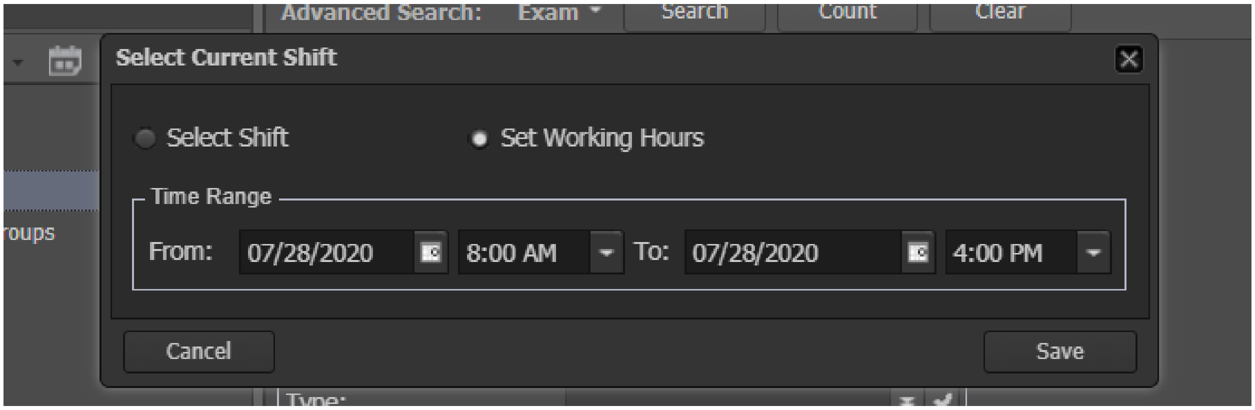
Selecting Edit opens the worklist advanced search. The user is able to make any changes needed to the worklist filter, and then select, Save, Reset or Cancel.



MRQ (My Reading Queue)

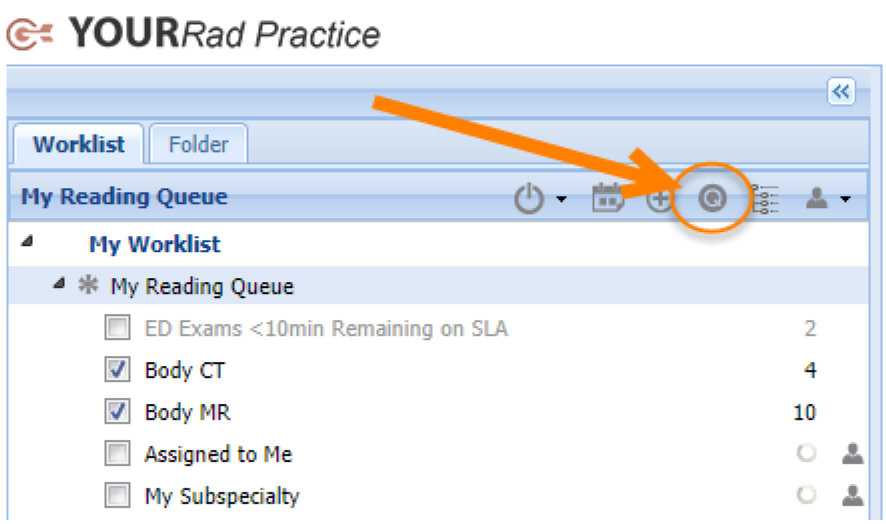
My Reading Queue is a worklist designed to help you sort and organize your worklist according to your specific reading priorities.

Clario is currently using shift based workflow wherein MRQ will be built for the radiologists upon login once they select their appropriate shift.

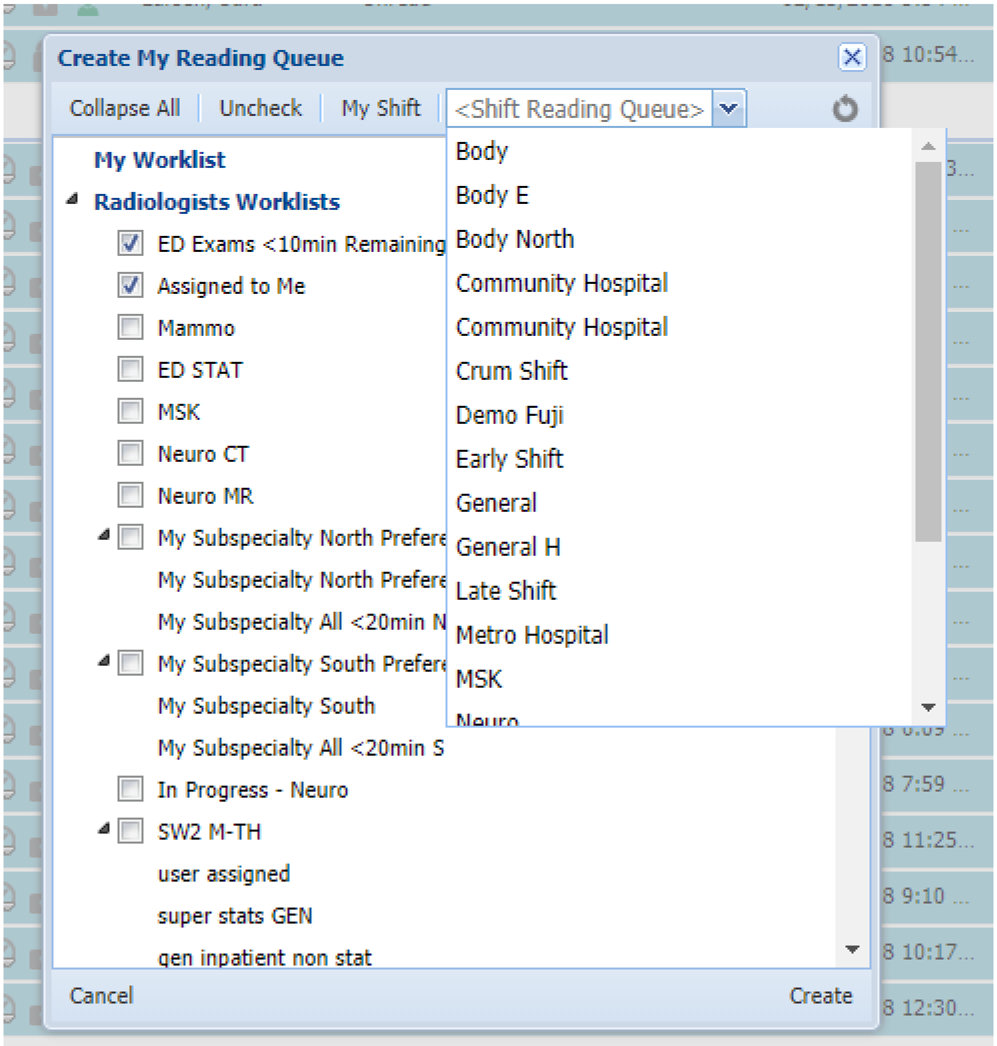


Creating My Reading Queue

If you are using shift-based worklists, your Reading Queue will be created for you when you log in. If you want to edit or create a new Reading Queue, click the Q icon in the top right of the Worklist panel.



This will open the dialog to Create My Reading Queue



From this dialog you can create or change your Reading Queue by selecting specific worklists or you can quickly reload your Reading Queue with the default worklists from another shift.

- Select worklists
    - Expand the worklist groupings or click 'Expand All' to view all worklists and individually add or change your reading queue. *Personal worklists are not eligible to added to MRQ, they must be global worklists*
    - 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.
- Click 'Create'
- "My Reading Queue" will be added to your MyWorklist section.

Organizing My Reading Queue

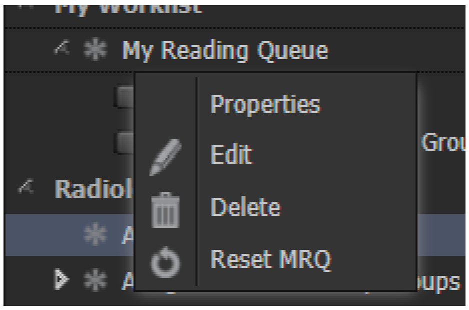
- Sort: You can drag and drop worklists to change their sort order. Clar

- Combine: Selecting the checkbox to the left of the worklist will combine the worklists into a
- single worklist. Combined worklists will be positioned at the top of My Read

How to edit MRQ

Editing the MRQ is user role permission based. If the user has the appropriate user permission to do so, they can right click on the MRQ to display the following options:

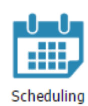
As with editing a worklist, the same functionality applies for MRQ.



Selecting Reset MRQ allows the user to result all of the settings back to the default status which was originally set up for the user (usually done so in Shift Management).

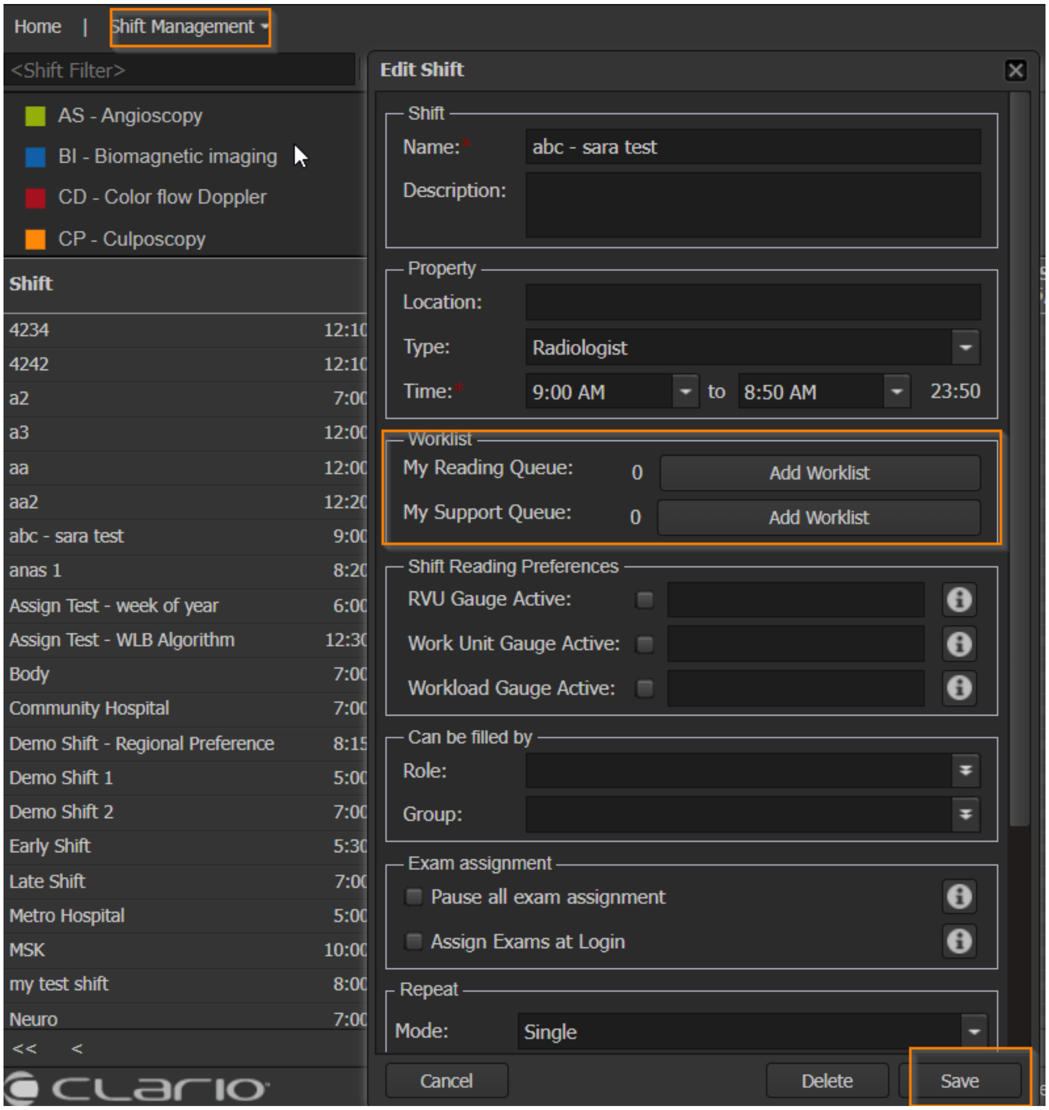
MRQ Sort Order Managed in Shift Management

Editing the worklist sort order for My Reading Queue can be done from Shift Management.

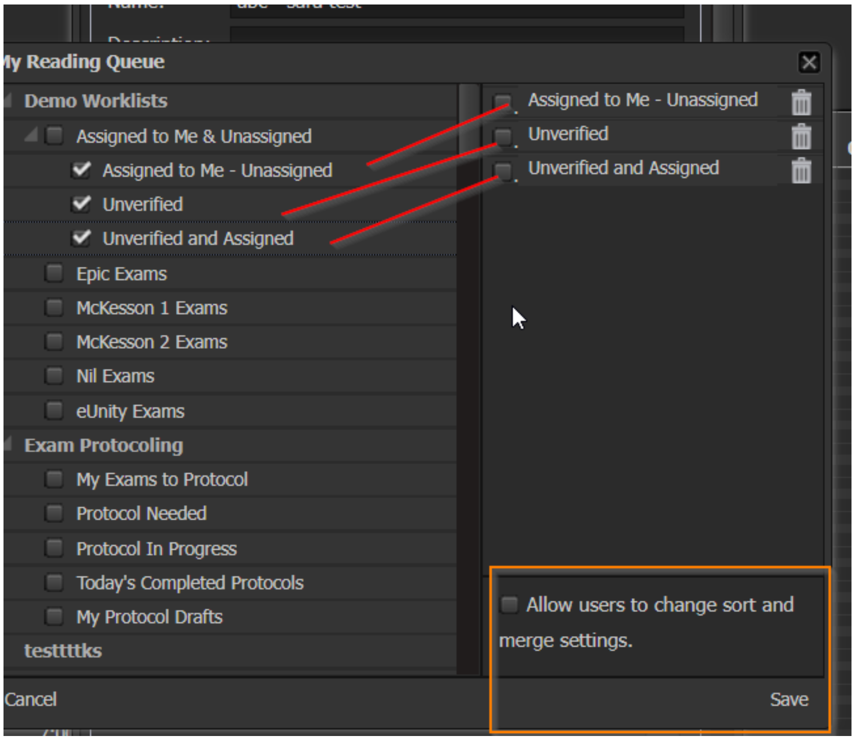
Login to Clario Worklist and select the Scheduling module 

Select Shift Management and click on the desired Shift that you want to edit the "My Reading Queue" (MRQ)

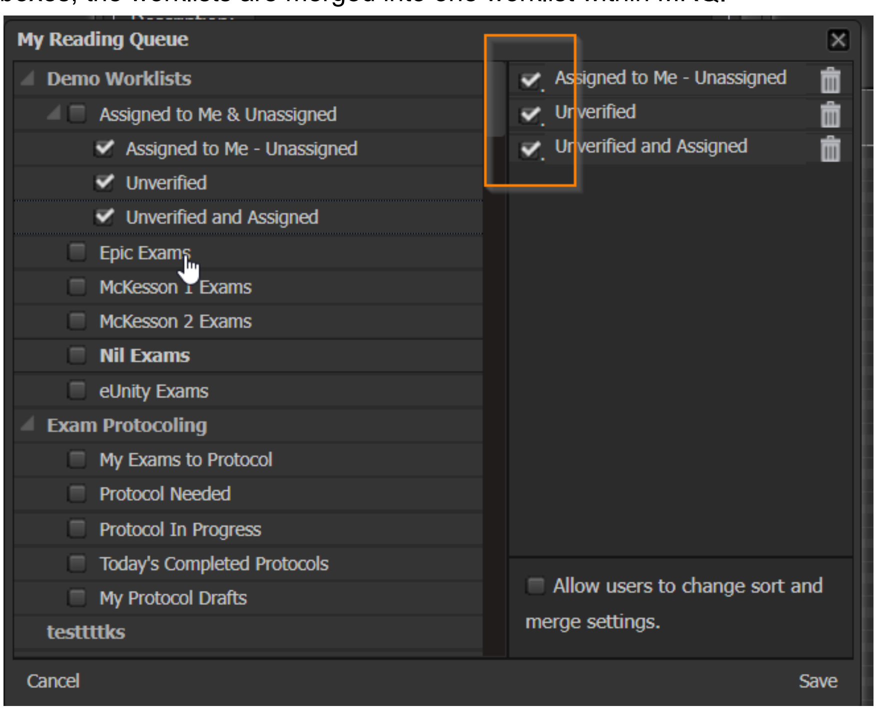
Once the shift is highlighted, click on "Worklists"



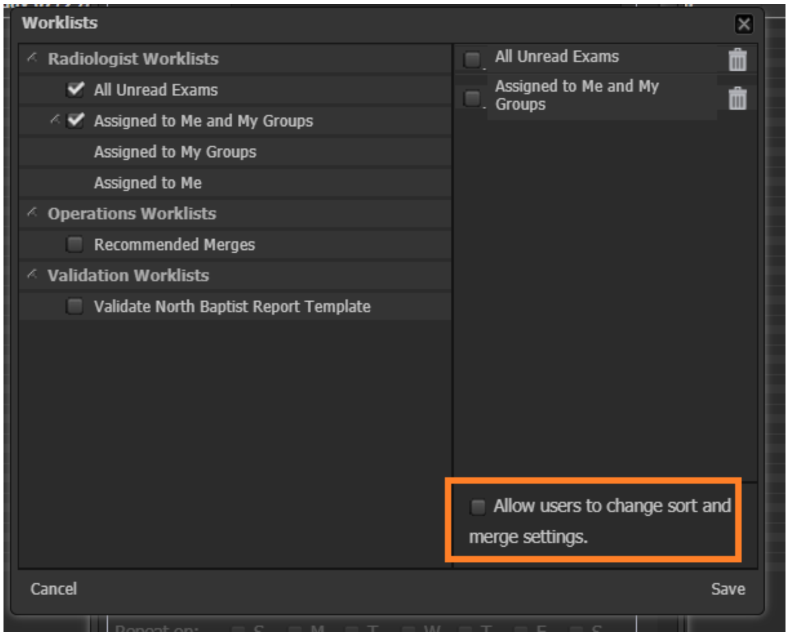
Once the window for the Worklists is open - the sort order for My Reading Queue is on the right side.



This order will determine the sort order for My Reading Queue when the user has selected that shift. You can drag and drop any of the worklists to resort. When you are done, click save.
You can also predefine which worklists are combined within the MRQ for the shift. By selecting the boxes, the worklists are merged into one worklist within MRQ.



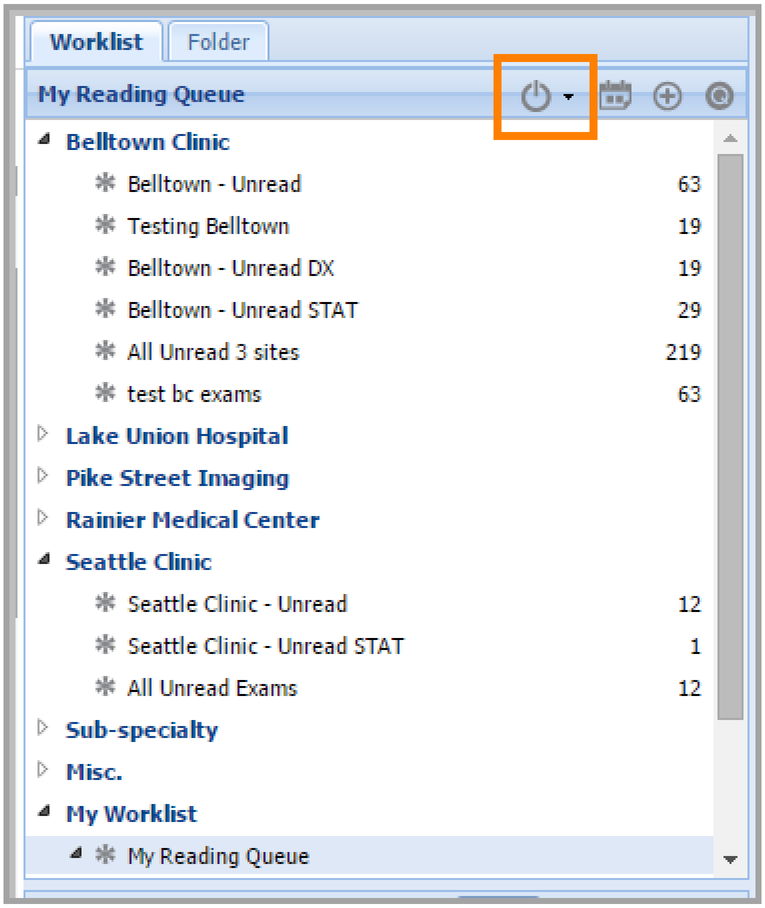
Lastly, you can also define if users should be allowed to change the sort and merge settings of the worklists in their MRQ by selecting the appropriate permission.



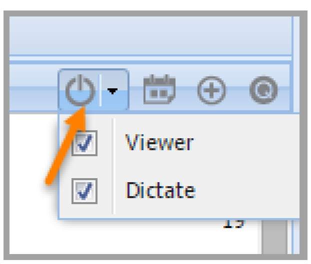
Auto-Next

To encourage productivity within a practice, Auto-Next should be used to maximize and optimize reading capabilities amongst radiologists.

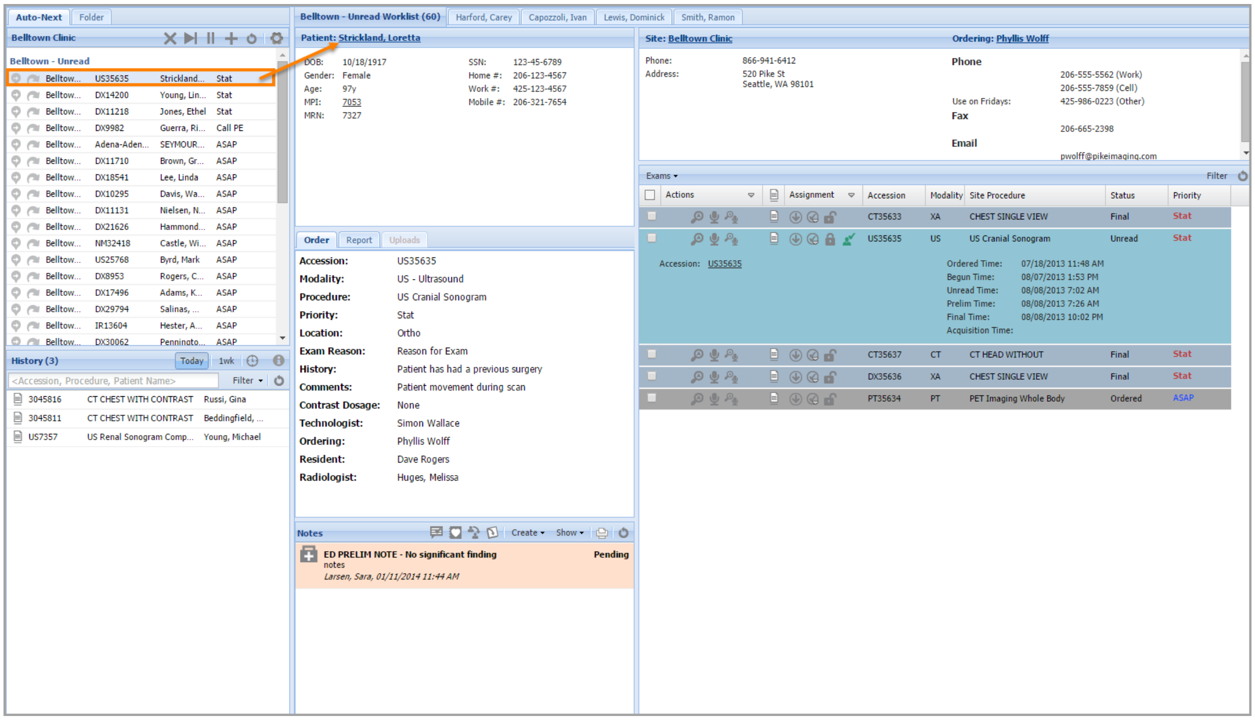
The auto-next control is found in the upper left portion of the user's screen in the "My Reading Queue" area. A worklist must be selected in order to start Auto-Next. Ideally, a radiologist will start Auto-Next with their MRQ selected as this is the work that has been defined for them to complete on their shift.



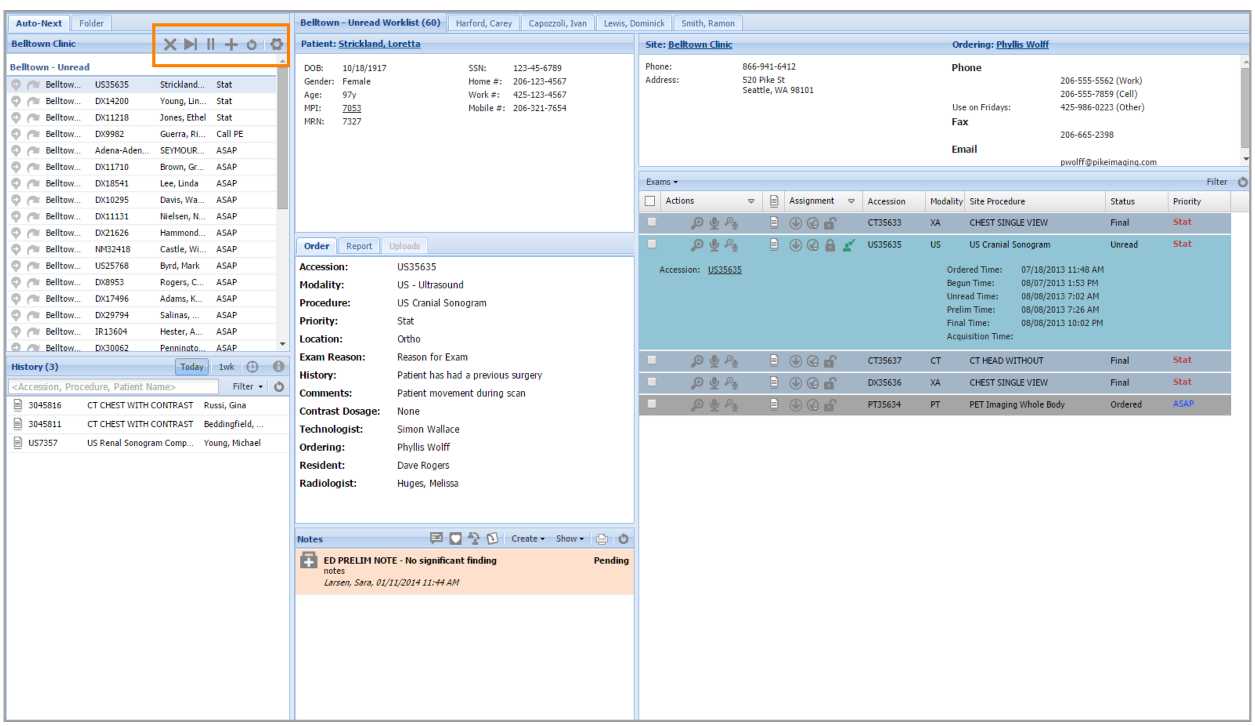
Selecting the drop-down next to the "auto-next" control will display "Viewer" and "Dictate" If selected, the options will open with "auto-next". If unchecked, the options will not open with "auto-next".



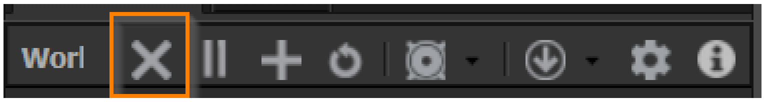
As you can see, the first exam on the "Auto-Next" worklist to the left is displayed in "Patient View" to the right.



Auto-Next tools are found at the top right of the "Auto-Next" Worklist.



To stop "Auto-Next" simply select the following:

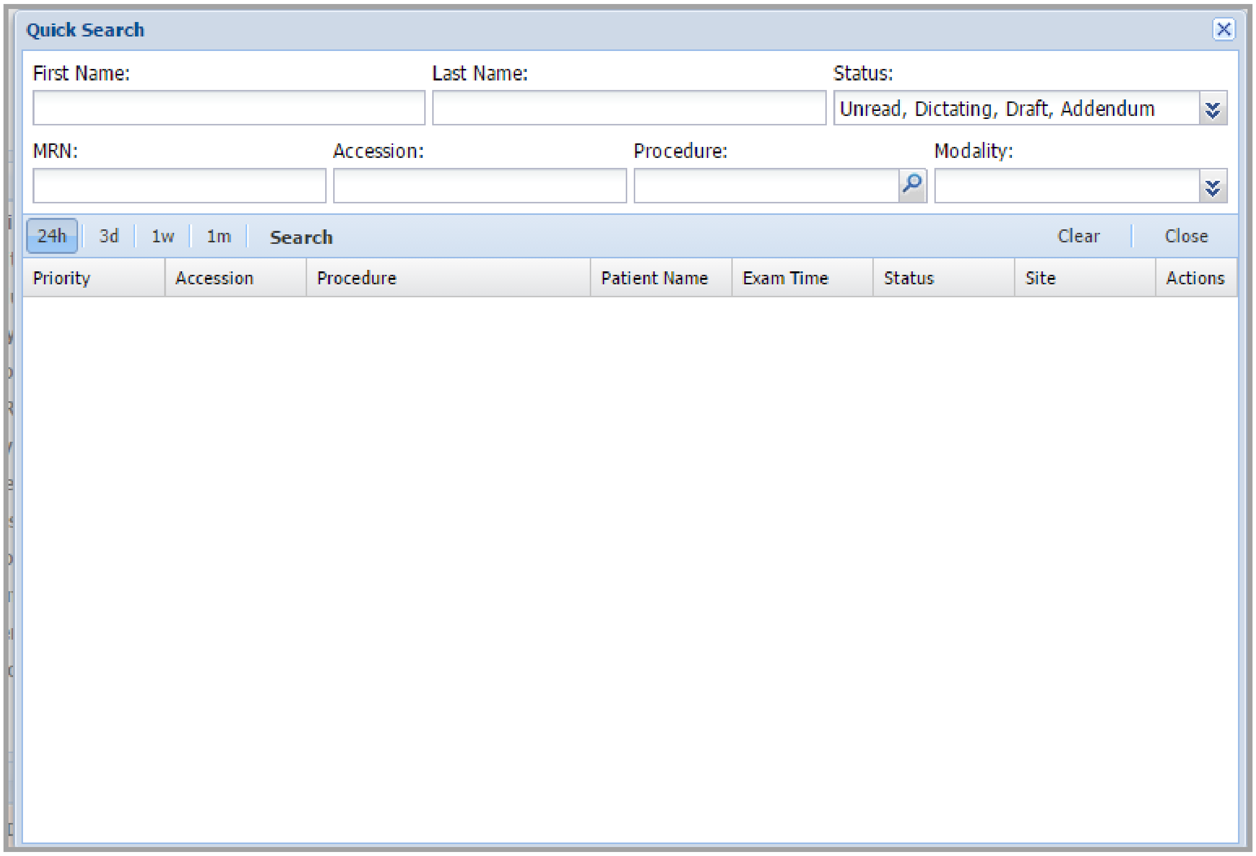


To skip to the next exam, simply select the following:

To pause "Auto-Next", simply select the following:

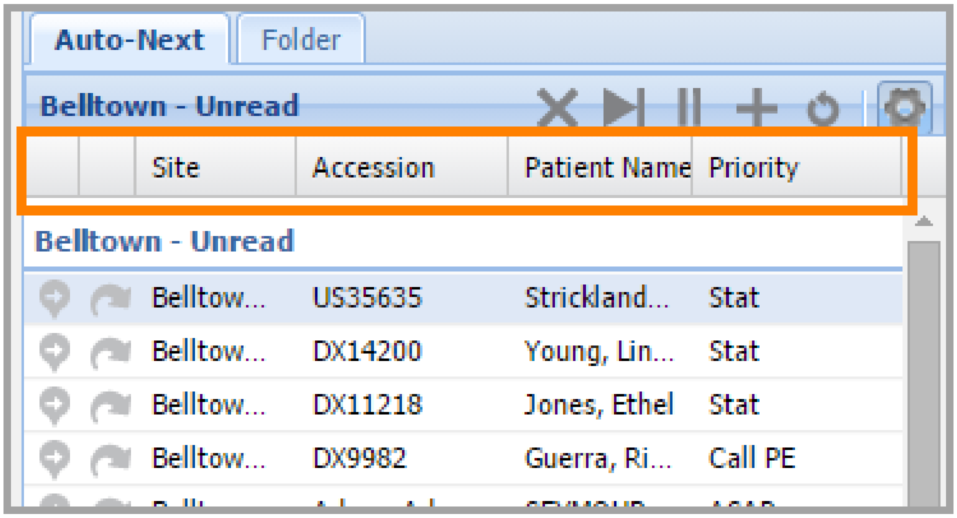
To add an exam to the "Auto-Next" worklist, simply select the following:

A "Quick Search" box will open, wherein the user is able to search for the exam to add to the "Auto-Next" worklist.

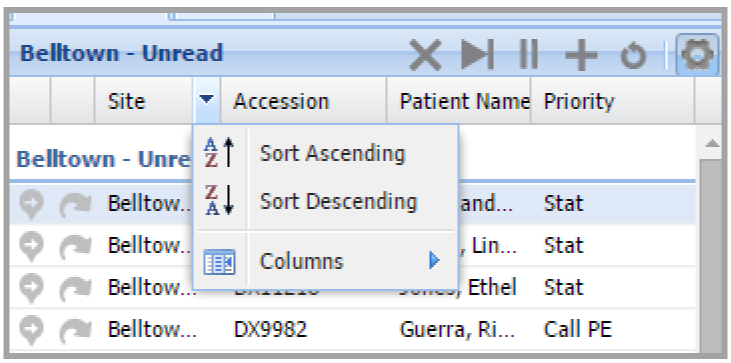


To refresh the worklist, simply select the following:

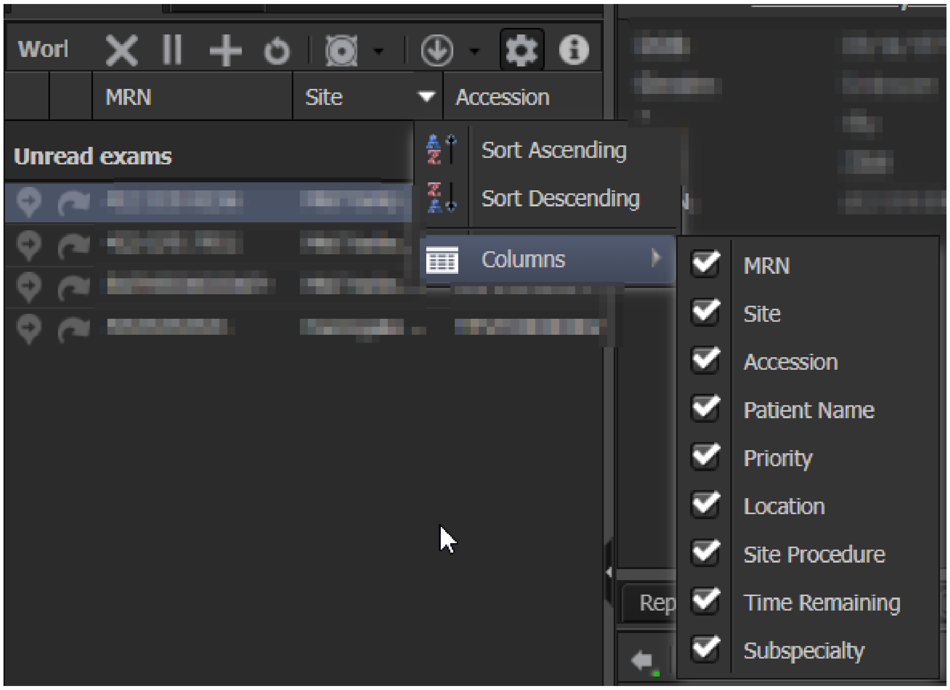
To view the worklist headers, simply select the following:



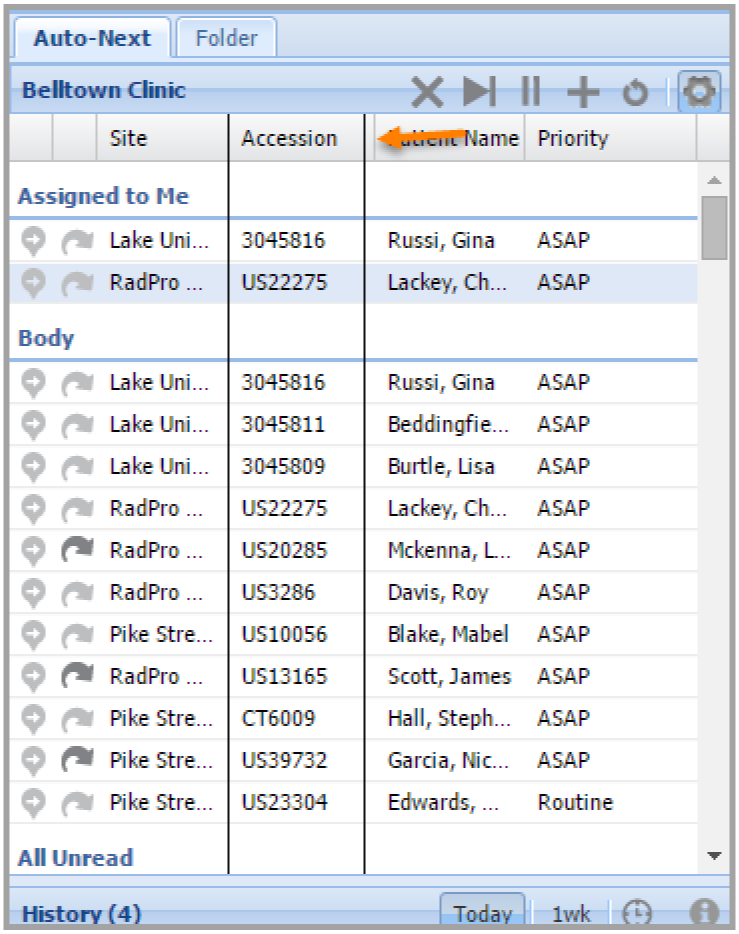
If the "Set Auto-next Columns" permission is enabled, users have the ability to re-sort columns while in auto-next by selecting the drop-down of the column. This sort does not persist if auto-next is paused or exited.



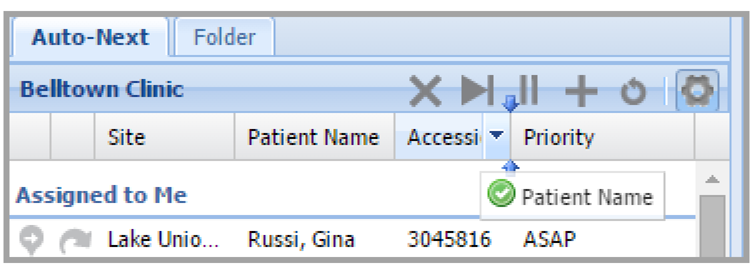
The worklist columns the user can add in Auto-Next are: Priority, Accession, Procedure Name, MRN, Patient Name, Site, Ordering Physician, Time Remaining, and Pro RVU. It appears you can add other columns, but the data will be empty on the auto-next worklist.



If enabled, the user can also rearrange and resize columns. These settings are not persisted between login sessions.

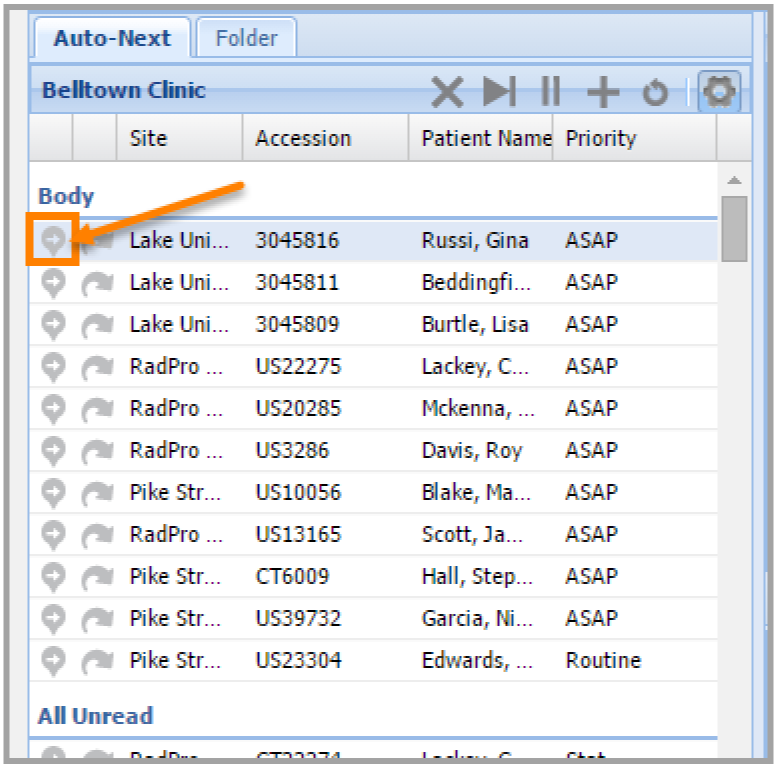


Selecting the column borders and dragging them allows the user to size the columns according to the width the user desires.

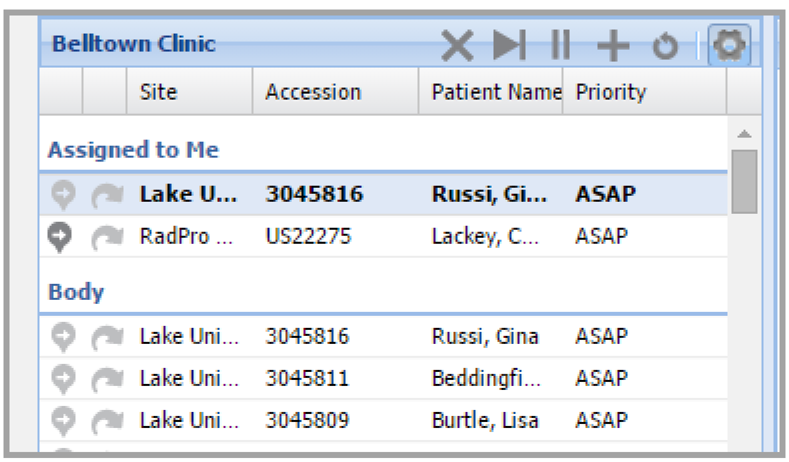


Dragging and "dropping" the columns allows the user to sort the columns in the order the user desires

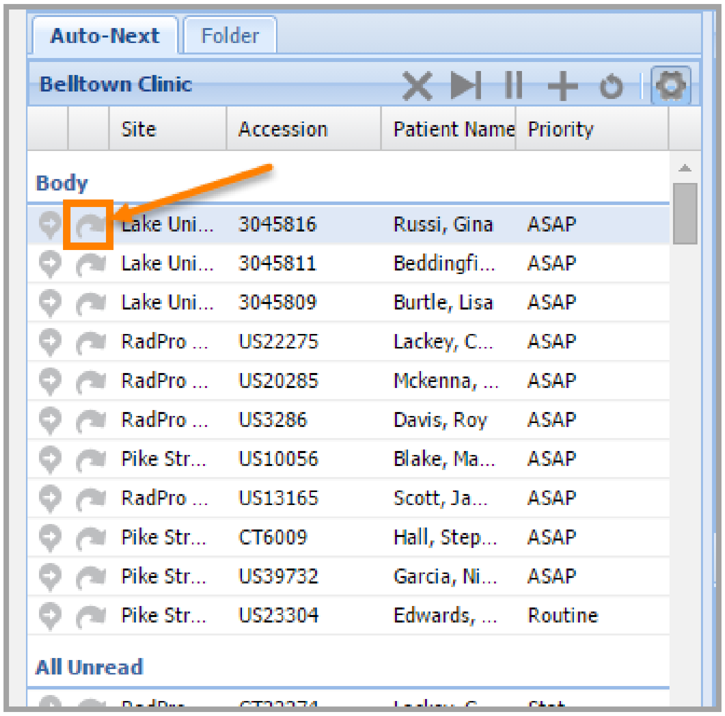
To mark an exam as the "next" exam to read in "Auto-Next", simply select the following:



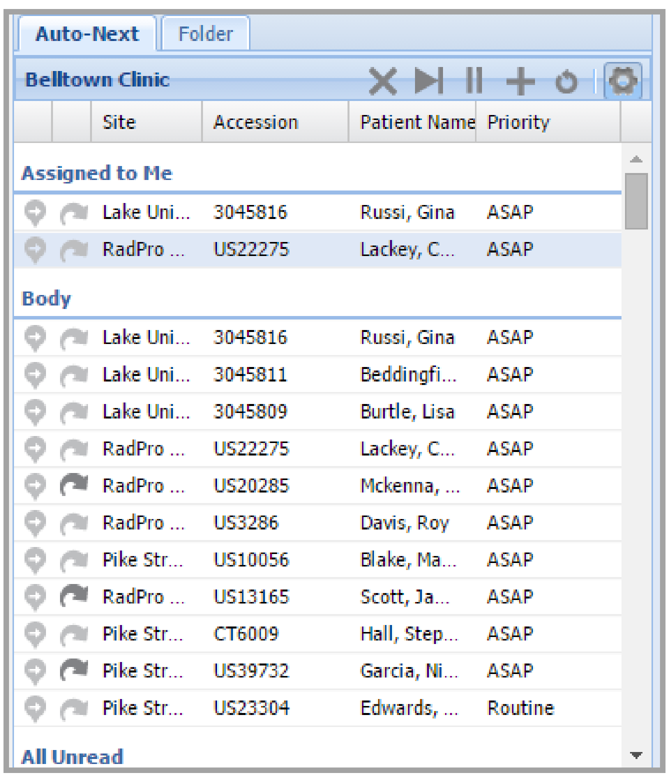
The icon next to the exam marked as "next" to read will then be darkened.



To skip an exam, simply select the following on the worklist:



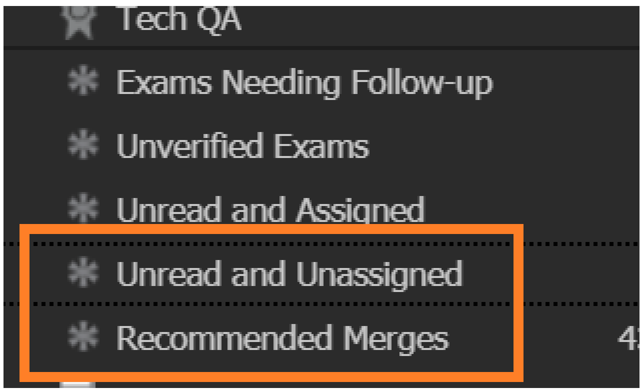
The icon(s) next to the exam(s) to be skipped will appear darkened.



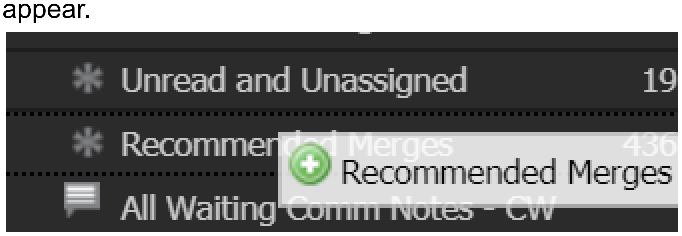
Combining Worklists

Sometimes a worklist can not be built using just one set of filters. In this case, a combined worklist may need to be configured. In order to do so, both worklists must first be created. Select one of the worklists, and drag and drop it on top of the other worklist. A pop out window will appear prompting the user to name the combined worklist.

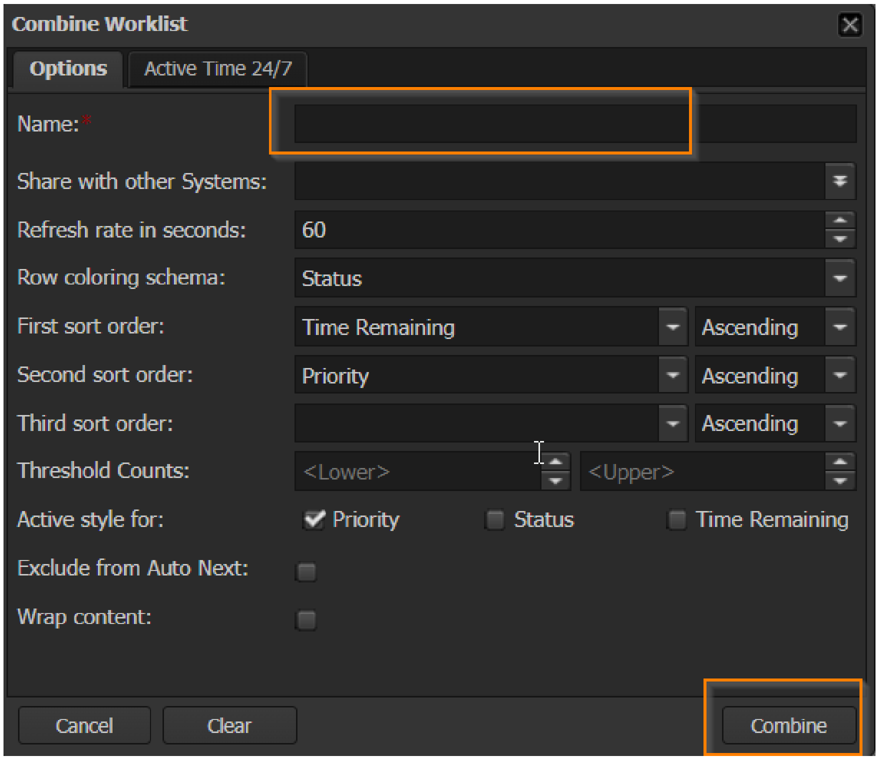
In the example below, the worklist "Recommended Merges" will be combined into the "Unread and Unassigned" worklist.



Selecting Recommend Merges and dragging it on top of Unread and Unassigned, a green plus sign will appear.

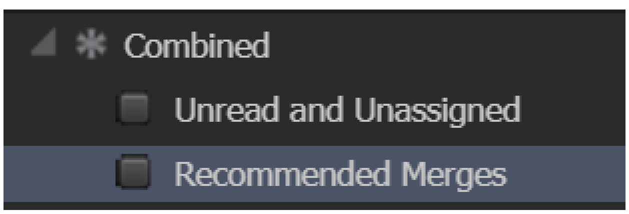


Name the combined worklist and set the appropriate settings.



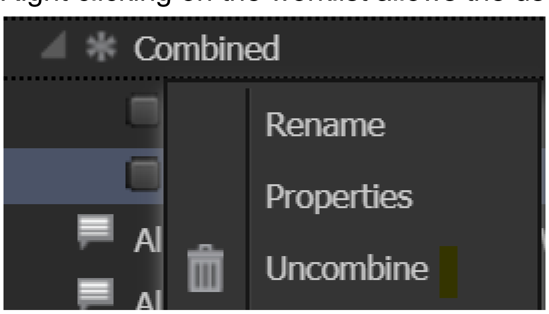
Ensure to select Combine when finished.

In our example, we named the new worklist “Combined”. The two worklists that are combined together to create the “Combined” worklist are listed underneath the worklist name.



How to Uncombine a Combined Worklist

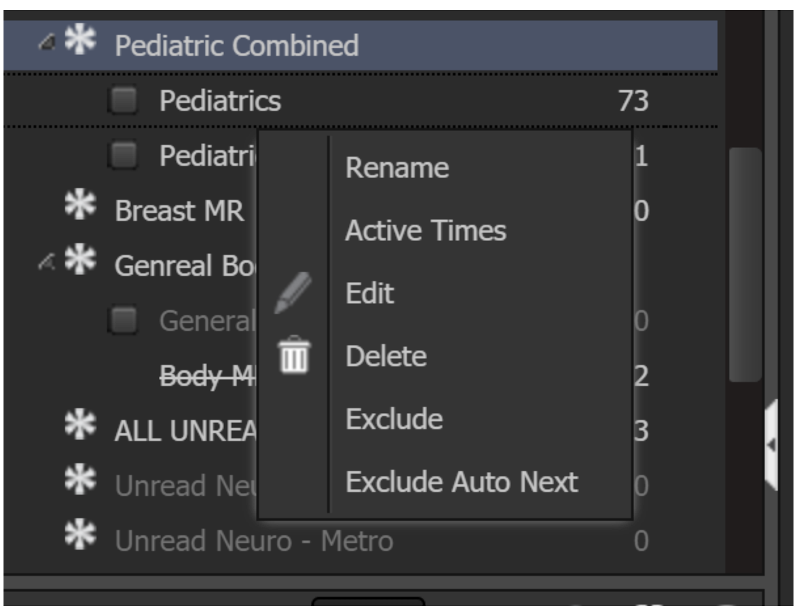
Right clicking on the worklist allows the user to uncombine the combined worklists.



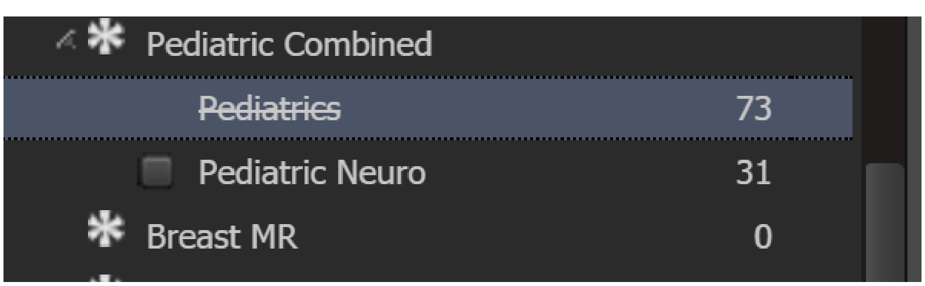
Excluding Worklists

Occasionally a practice may need to exclude specific search criteria from a worklist. In order to do so, a combined worklist must first be created (See Combining Worklists). Excluding a worklist from a combined worklist allows a user to only see one portion of the combined worklist. In the below example, we have a Pediatric Radiologist that only wants to look at the Pediatric Neuro worklist.

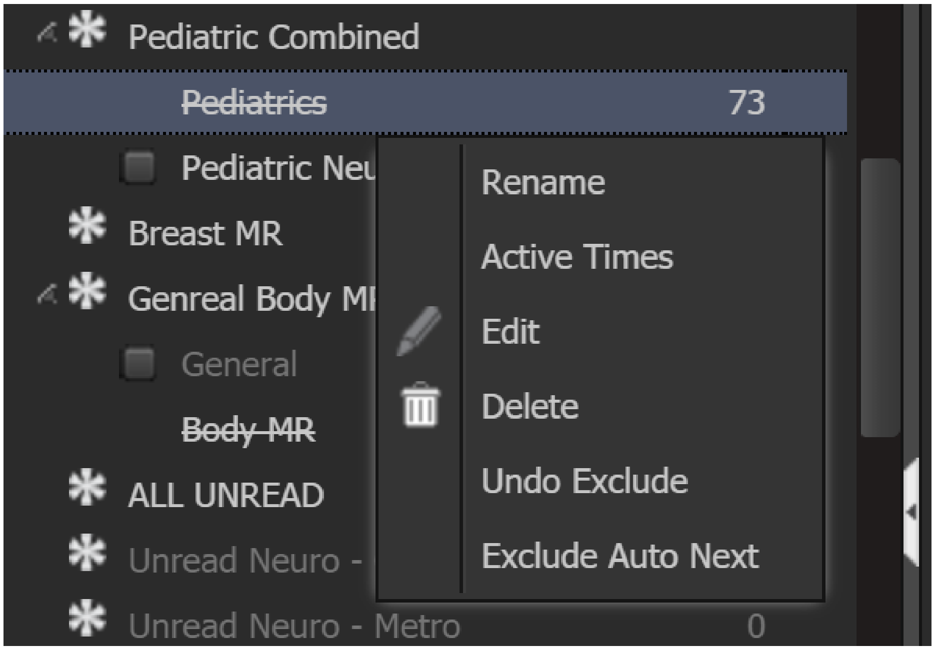
From there, you will then need to identify which of those worklists needs to be excluded. Simply right click on the worklist that needs to be excluded and select "Exclude". In the below example, we want to exclude the "Pediatrics" worklist from the "Pediatric Combined" Worklist, in order for the radiologists to only see the "Pediatric Neuro" Worklist.Right click on the Pediatrics worklist and a list of options appear..



After I select "Exclude", the excluded worklist will then have a line through it, as depicted below.

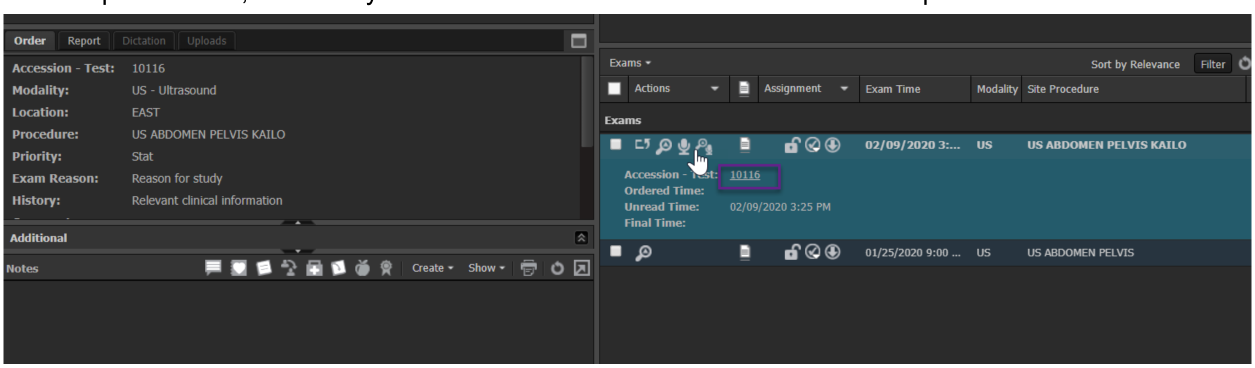


Whenever the user is ready to see the entire worklist again, they simply have to right click on the worklist and hit "Undo Exclude".



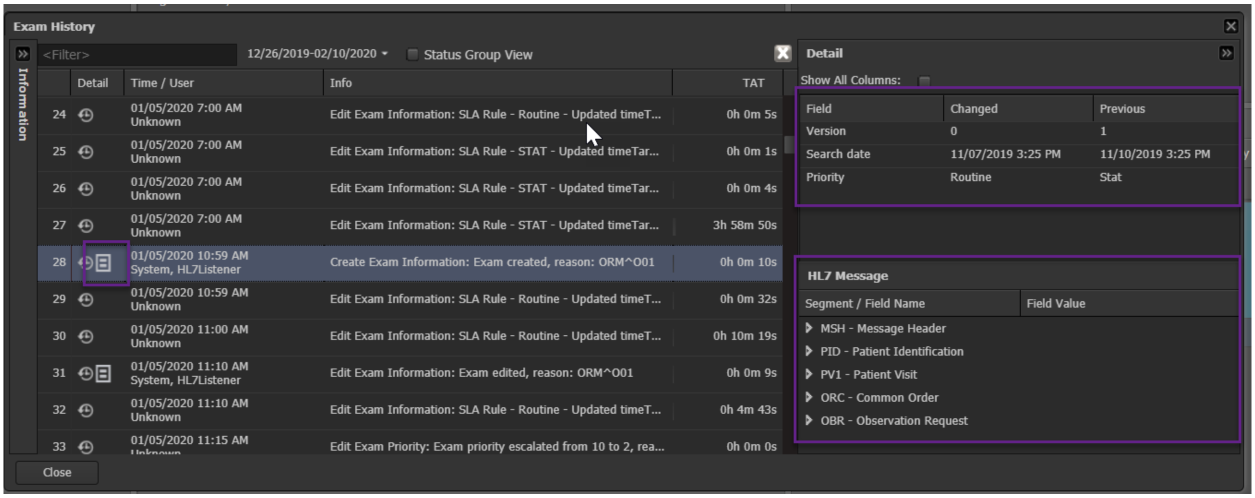
Exam History / Exam Audit

While in patient view, users may select the accession number of the exam to open the exam audit.

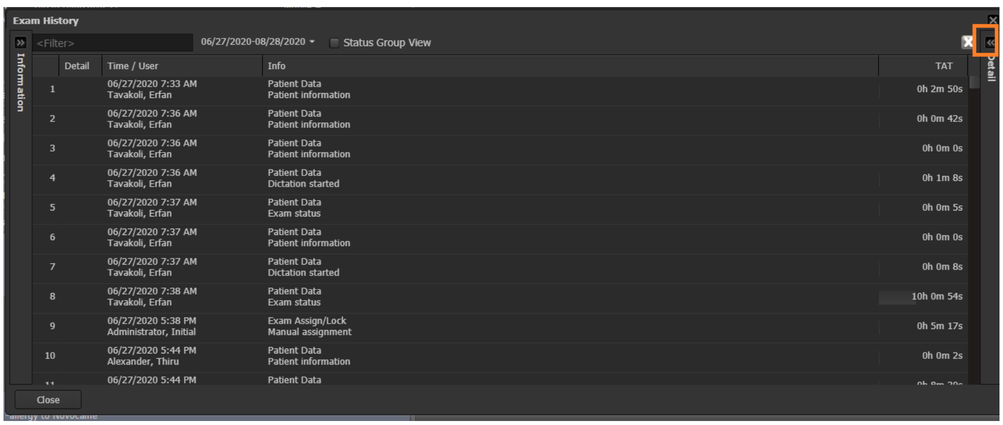


Once the hyperlink accession number is clicked upon, the audit will open in a new box. This box will open the exam’s history. By selecting the paper icon next to the HL7 message- the user will be able to drill down further into the HL7 messages.

For example, in this screen shot- we are viewing the HL7 message that caused the exam to change from STAT to Routine.

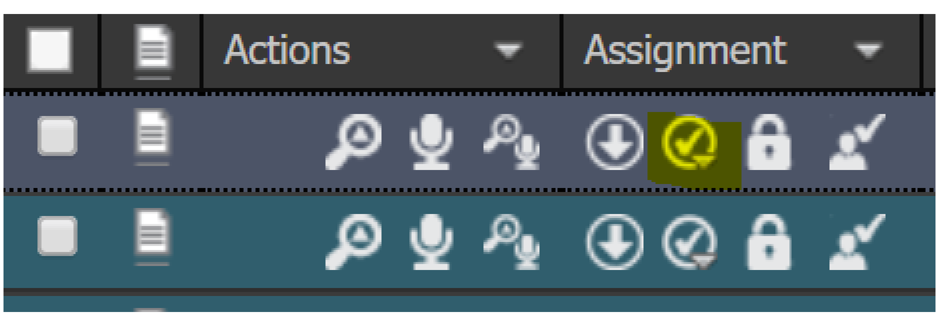


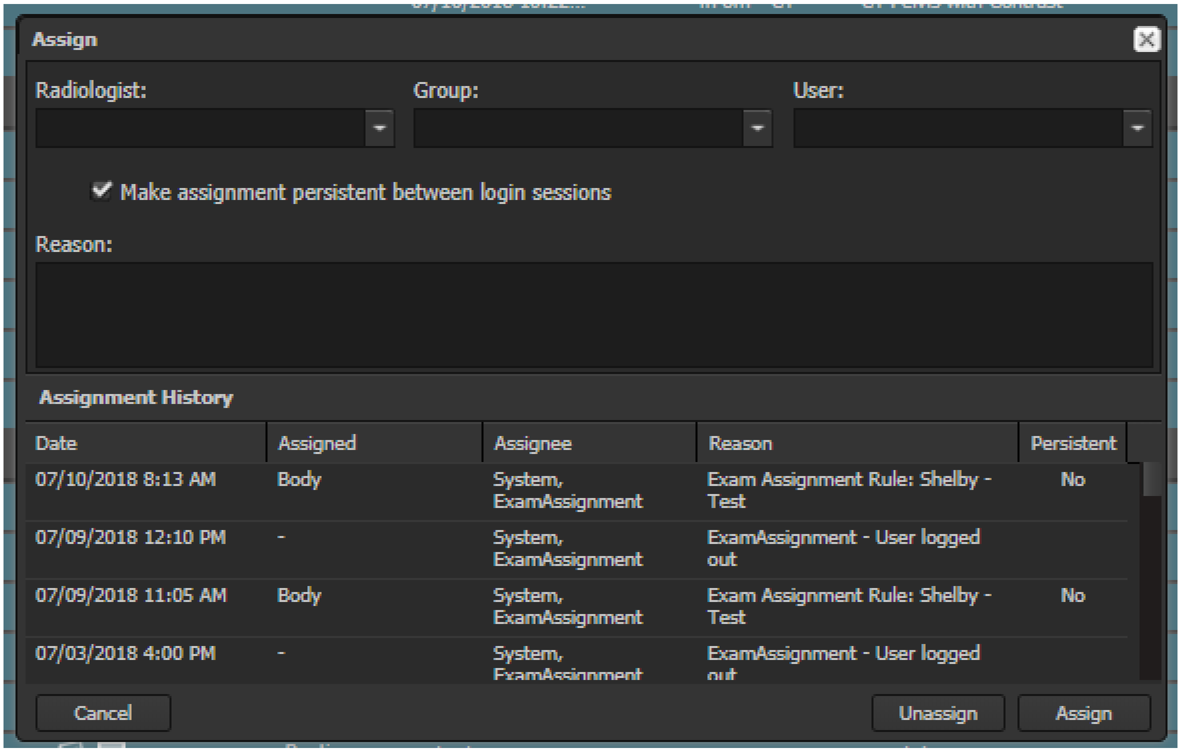
Note: The Detail and HL7 Message fields may be minimized by default. The user will need to simply expand the box to display the fields.



Assignment History

The assignment history of an exam is found from the worklist section of the Clario SWL. Selecting the assignment icon will open up a pop up window displaying the assignment history of the exam.





Under the Assignee column, the user is able to identify if the exam was signed by an assignment rule or manually assigned by a person. System, ExamAssignment indicates an assignment rule.

Persistent indicates whether or not the assignment rule was a persistent assignment rule assigning the exam. For more information on Persistent Assignment rules, please refer to the Assignment rule section.

MPI

Master Patient Indexing (MPI)

MPI is a service that Clario provides to match patient records from multiple facilities. The purpose of MPI is to have the option to merge patient information together by either a Clario automatic merge, a recommended merge or a manual merge. The clinical value of an MPI merge is providing the radiologist with all prior reports, regardless of which site they came from, when reading the current exam. This service is running at Envision. **It is important to note that the merges in the MPI are only within the Clario system and do not affect or change any other systems.**

Clario Smart Worklist - MPI Match Criteria

1. Patient Last Name
2. Patient First Name
3. Patient Middle Initial
4. Patient DOB

5. Patient Gender

Each area is weighted a specific percent. The default settings for the MPI in Clario are as follows:

The default weight given to each by the technical services team is:
DOB - 15, Firstname - 35, lastname - 40, gender 10, middle - 0

The technical services team then can tweak this to the customer's specifications.

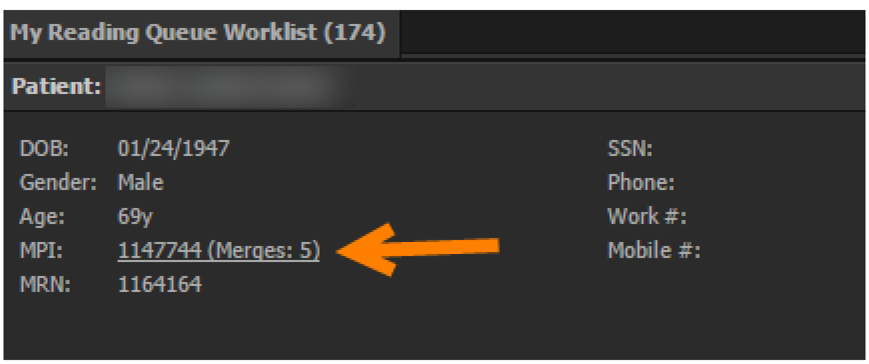
How to Merge Patients in Clario with the MPI service.

Automatic Merge

If the MPI service is running, by default, Clario will automatically merge patient records if patient information matches 100%. This is a configurable score and can be adjusted by your service team.

Recommended Merge

If there was not a 100% match of patient information, but some of the patient information matches, Clario will recommend a merge. In this case you will see MPI: # (Merges: 1) located in the patient view in the patient information window.



To Confirm or Reject a Recommended Merge:

1. Select the MPI merge link in Patient View
2. Under the Unconfirmed Merges tab you will see the current patient's information and the recommended merge patient's information
3. ->Information that matches exactly will be displayed in green text. Information that is not an exact match will be in red text
4. Select Confirm or Reject

-->If confirmed, the merged patient will appear on the Confirmed Merges tab

--> If rejected, the rejected merge will appear on the Rejected Merges tab

To undo a merge:

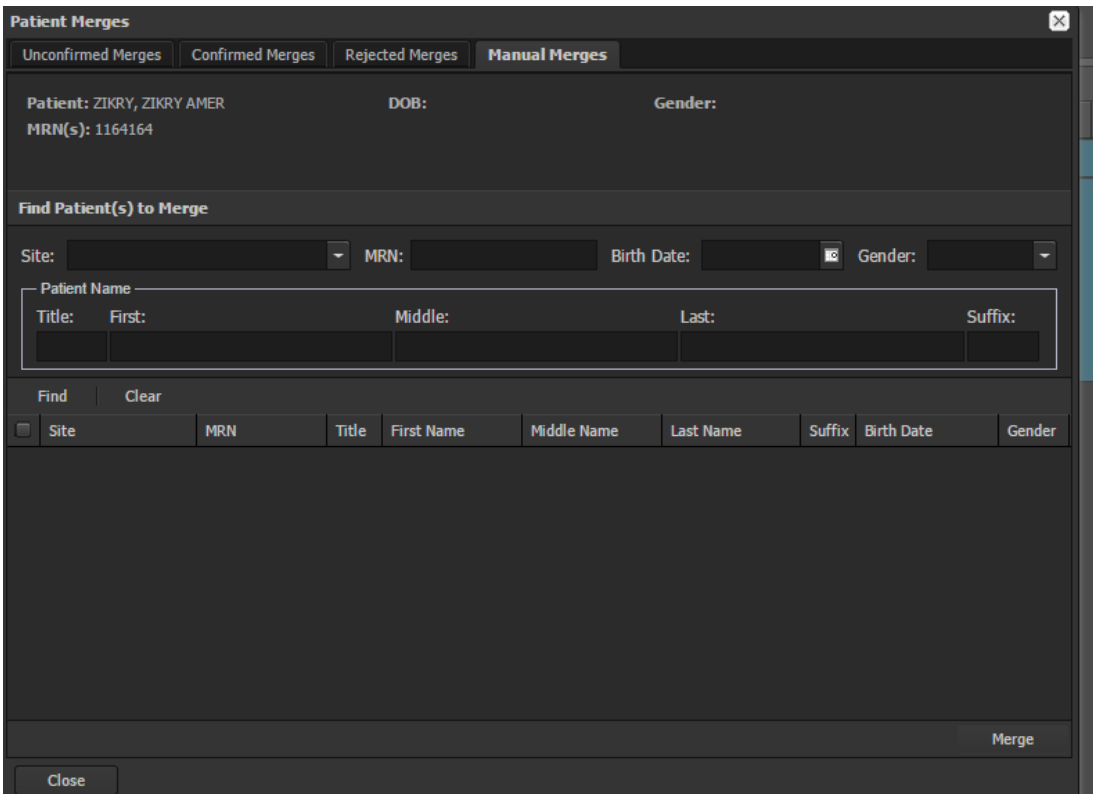
Select the Confirmed Merges tab and click reject

1. The rejected merge will now show up under the Rejected Merges tab
2. Rejected merges can be undone by selecting Undo Reject

To manually find patients to merge:

1. Click the MPI merge link
2. Select the Manual Merge tab
3. Enter patient information under “Find Patient(s) to Merge” and click find
4. Select the patient(s) you would like to merge and click merge

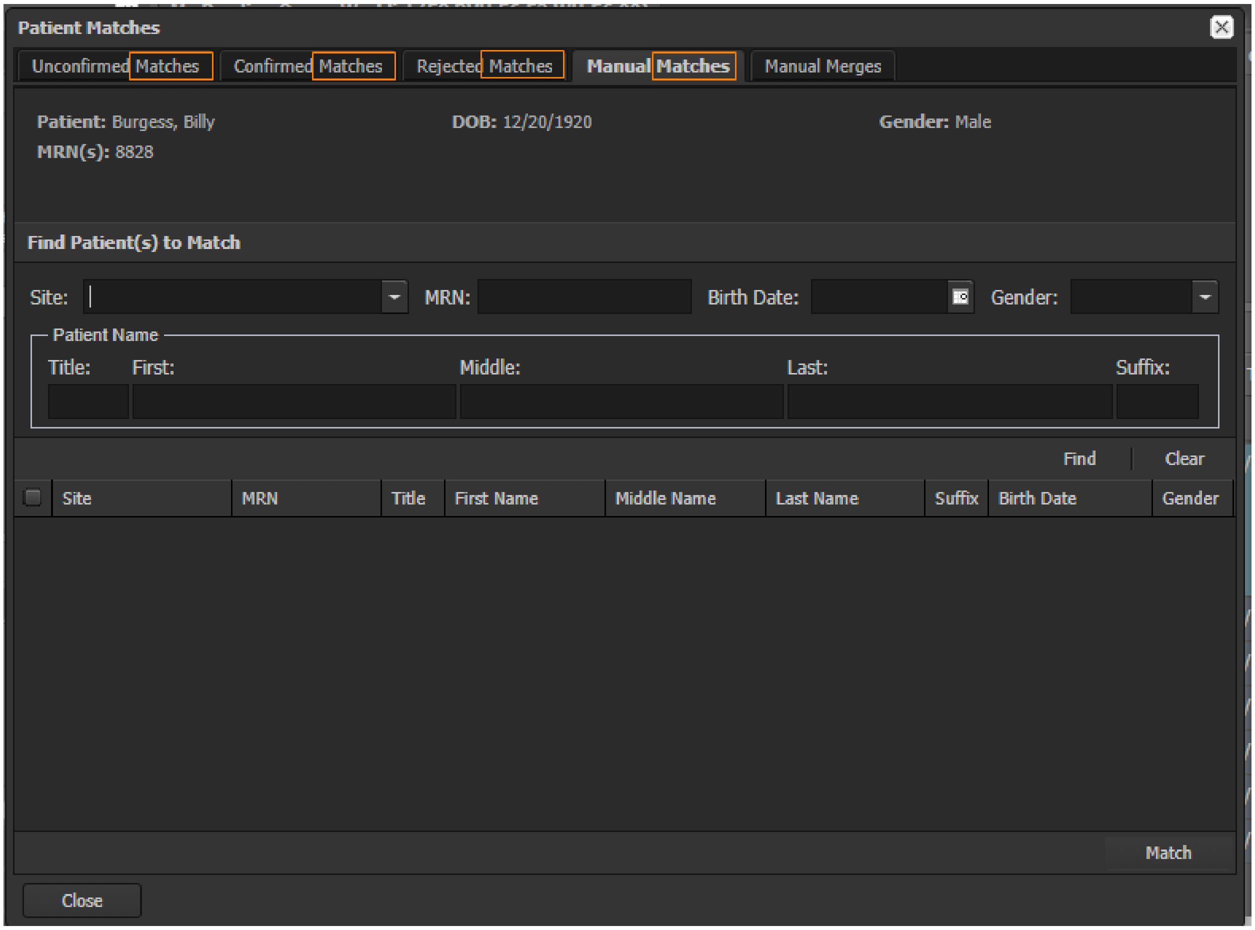
-- Manual merges can NOT be undone



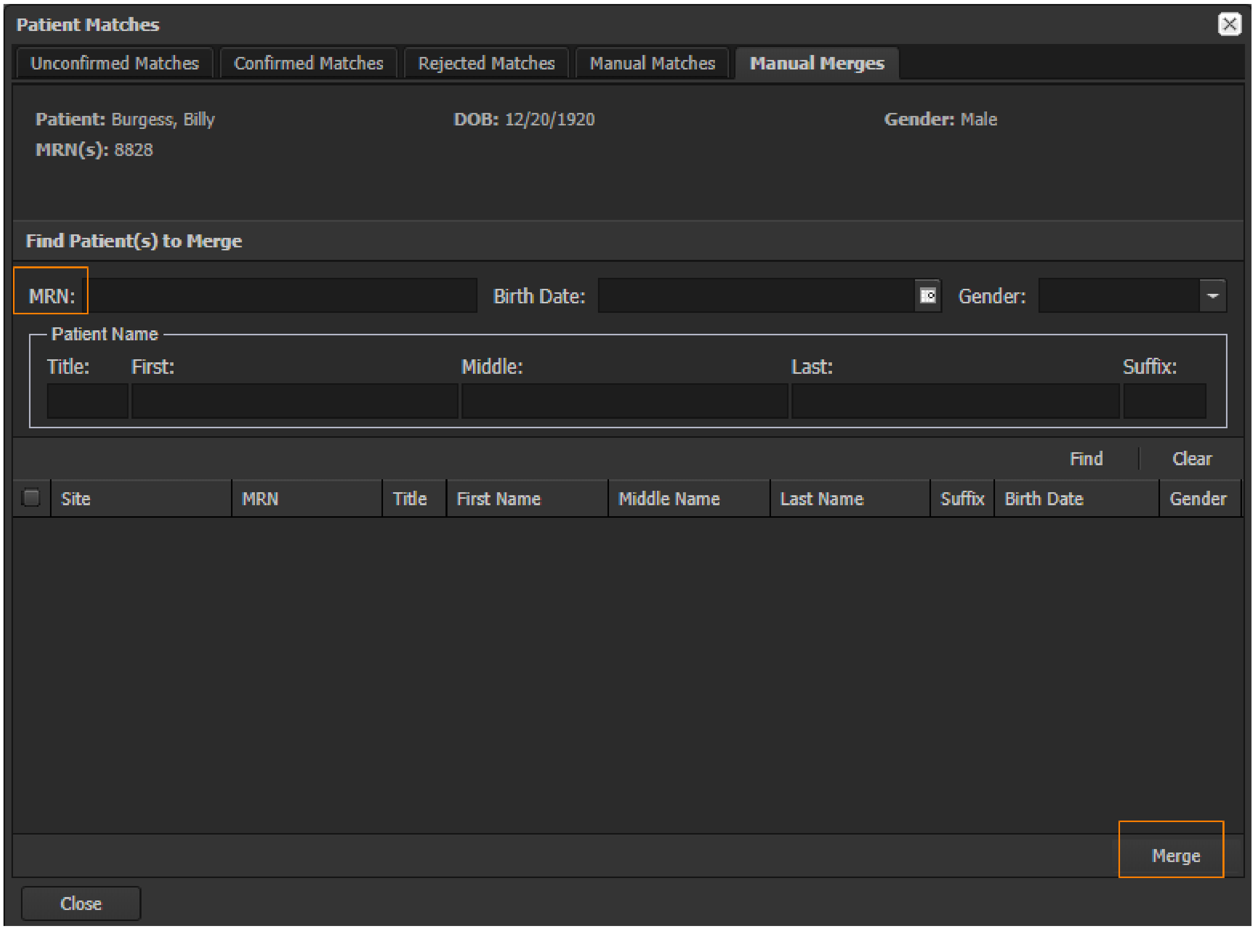
Patient MRNs

Patient MRNs can be merged.

The previous Merge function in earlier versions has been renamed "**Match**" in Clario. It is renamed Match due to the fact that it is matching patients under one MPI.

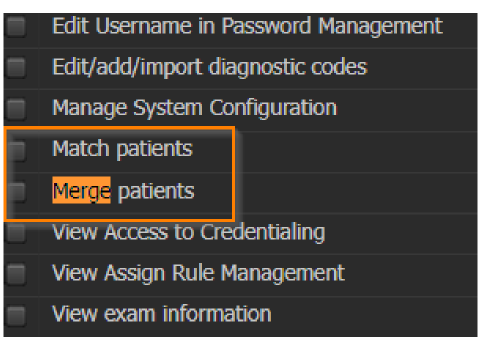


The new merge feature is a true merge feature wherein the user can select the MRN and other fields to **replace** in the merge.



MPI Permissions

The permissions for a manual merge and confirming an automated match are separated. The permissions are under Management > User Role Management > Management and the permission for a manual merge is called "Merge Patients" and the permission for confirming an automated match is called "Match Patients".



FaxLogic Integration

Clario will go live with the Clario SmartWorklist with an integration with FaxLogic in place. With this integration, when sites are configured to receive a faxed report, Clario will automatically send the report.

In order to troubleshoot any issues with the FaxLogic integration, such as whether or not a report was received, the Intelerad PACs Admin team must consult the FaxLogic Portal as this is not visible within Clario.

Analytics

Analytics Overview

Clario's Analytics module provides enterprise wide operational data and real-time practice information. All the data you need to completely optimize your radiology practice is in a properly deployed unified worklist.

How do we do it?

First, we capture the right data

The Clario unified worklist captures much more practice efficiency data than any other system in your enterprise. Not only do we capture information about ALL your exams, but the depth of information is much greater.

Data	Source
Exam date/time stamps	HL7
Assignment history	Clario
Time spent selecting exam	Clario
Time spent reading exam	Clario
Shift	Integration with Rad Scheduling software
Consultations	Clario
Interruptions	Clario
Radiologist information (Subspecialty and profile)	Clario
Location	Clario
Peer Review Score (for a % of exams)	Clario

Next, we analyze your practice data

Before jumping to solutions based upon radiologists "feelings" about where they are losing productivity, we look at the practice data. Radiologists can point the analysis in the right direction, but data is always greater than opinion. Here are some things we will look at:

- Shift and radiologist productivity
- Interruptions
- Interfaces with Operations Staff and Radiology Assistants
- Exam assignment patterns
- Modality, site, subspecialty patterns
- TAT and 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

Customers can use the following tools to view data in the Clario system:

Dashboard Widgets

- 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.

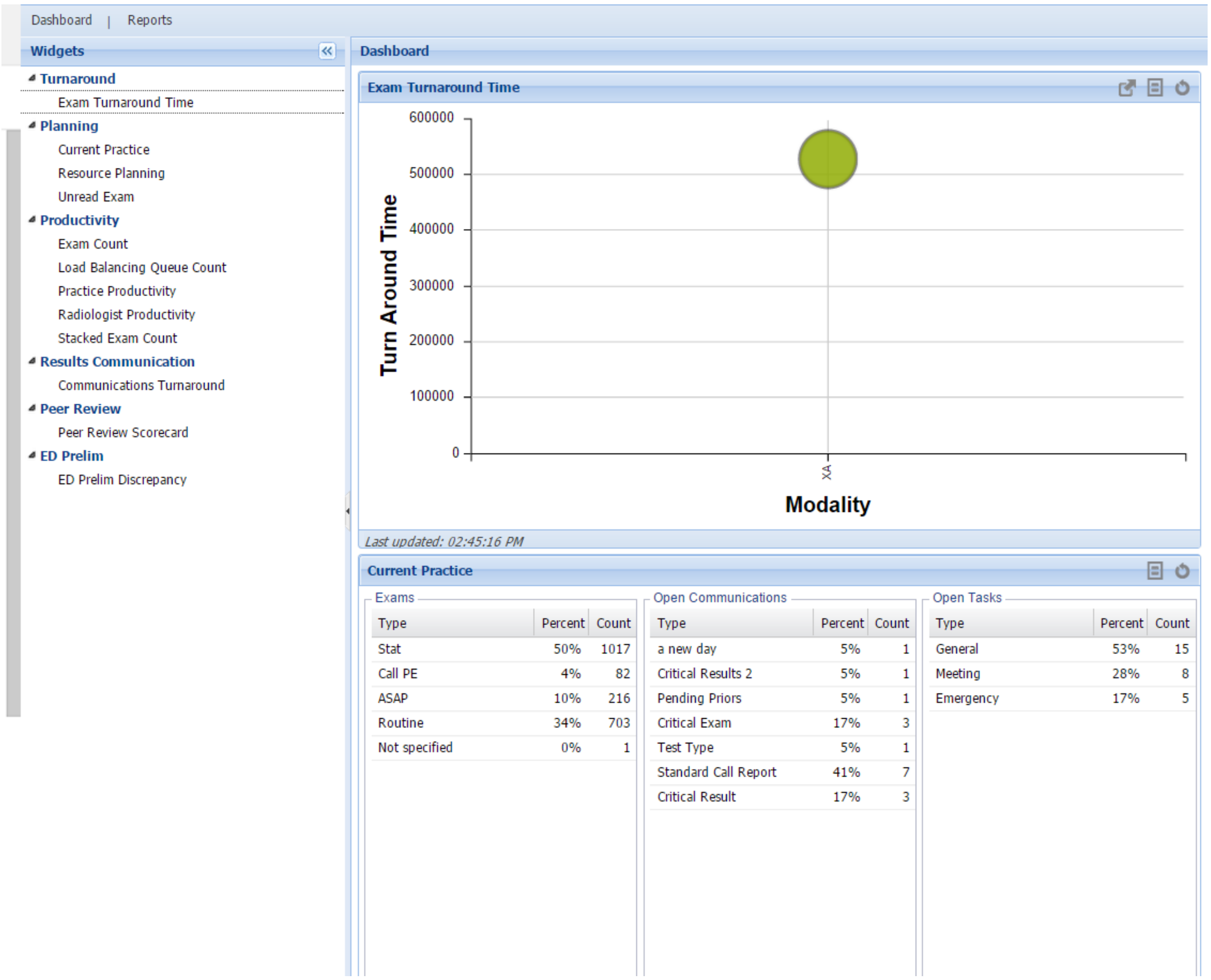
Widgets can be accessed from the Analytics module. A widget is a real time view of exam data. Having access to these widgets can help your administration team see how your practice is currently operating, which can help with resource planning.

Each widget is permission based. Permissions are set in the Management module under User Role Management.

To view available Widgets visit the Dashboard folder.

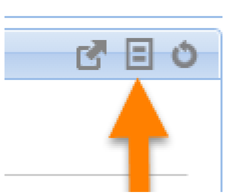
How to add a widget to your dashboard

Click on a widget name in the widgets panel on the left side of the dashboard
-->The selected widget should now appear on the main section of the dashboard
-->The same widget can be selected and added to your dashboard more than once

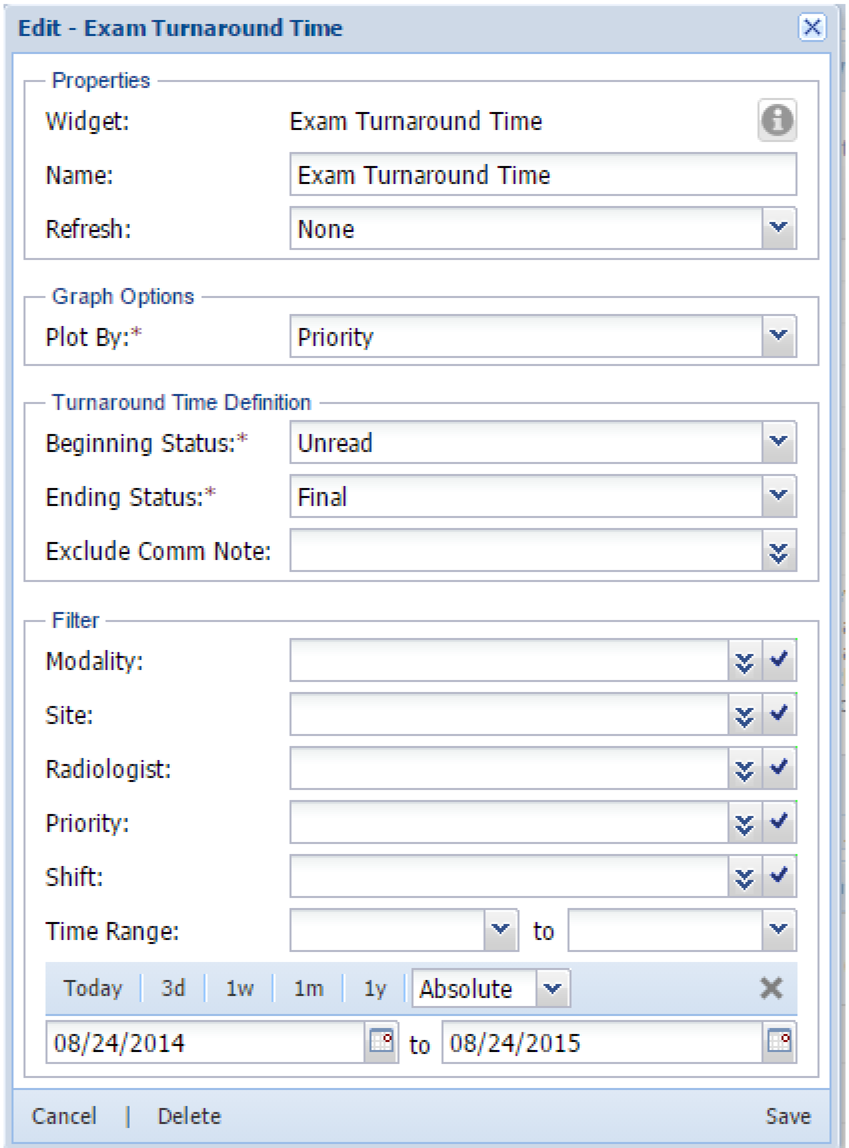


How to Edit/Filter a widget

Click the Edit icon in the upper right hand corner of the widget

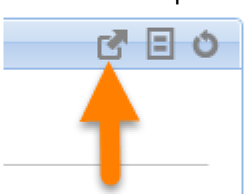


2. Enter the criteria you would like to see in the widget
-->From here you can choose to Save or Delete the widget

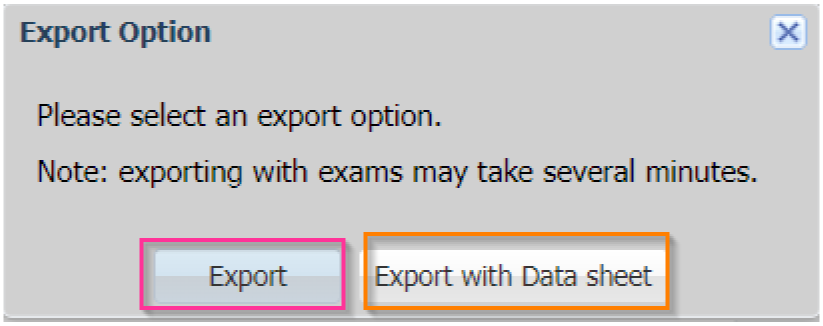


How to Export widget data

Choose the Export icon



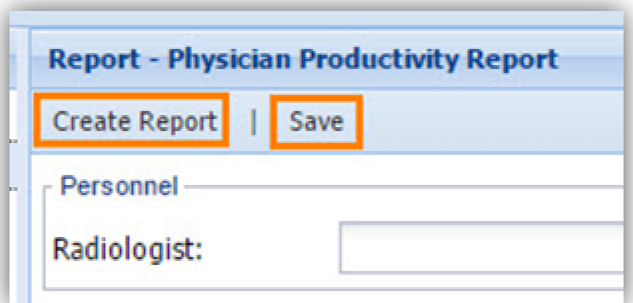
Select Export to export a quick view of the information seen in the widget
Select Export with Data Sheet to export a detailed file with exam information (permission required for this functionality)



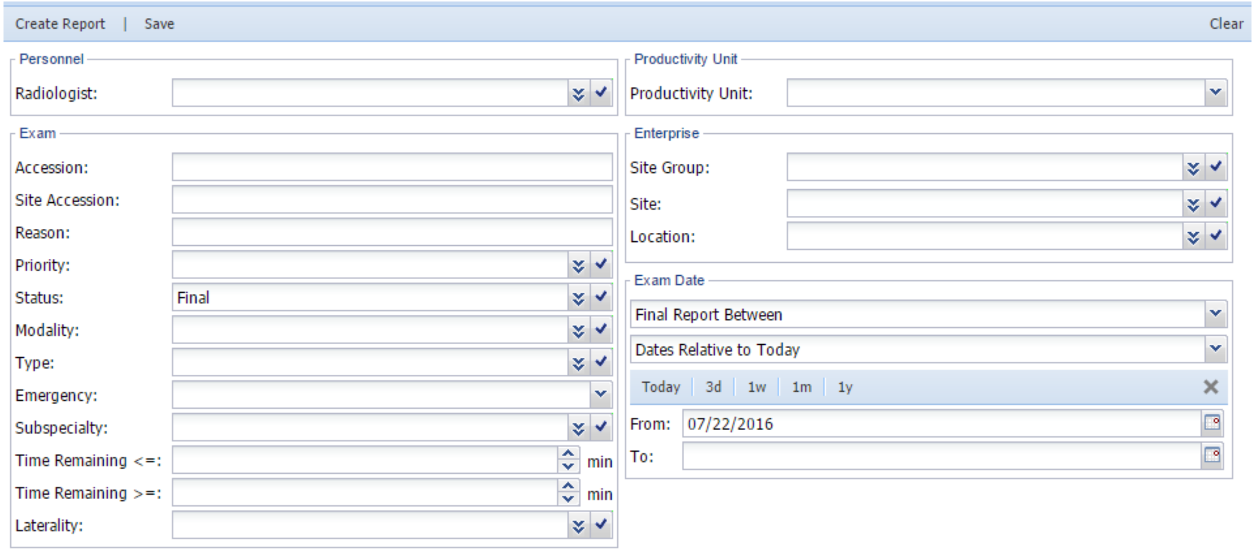
Reports

- Each report can be scheduled to auto-generate on a schedule and get auto-emailed to a list of recipients in a password protected format.
- If a custom report is needed, the customer can work with the Clario team to create the report and have it available in the "custom reports" section of the reports module.

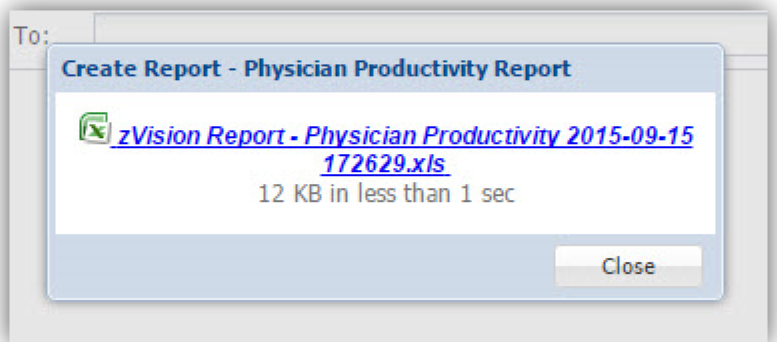
A user is able to create a report, save a report or schedule a report to automatically run or be sent via email. If saved, the selected filters will save under the report name in the report table where it can be accessed to download at any time.



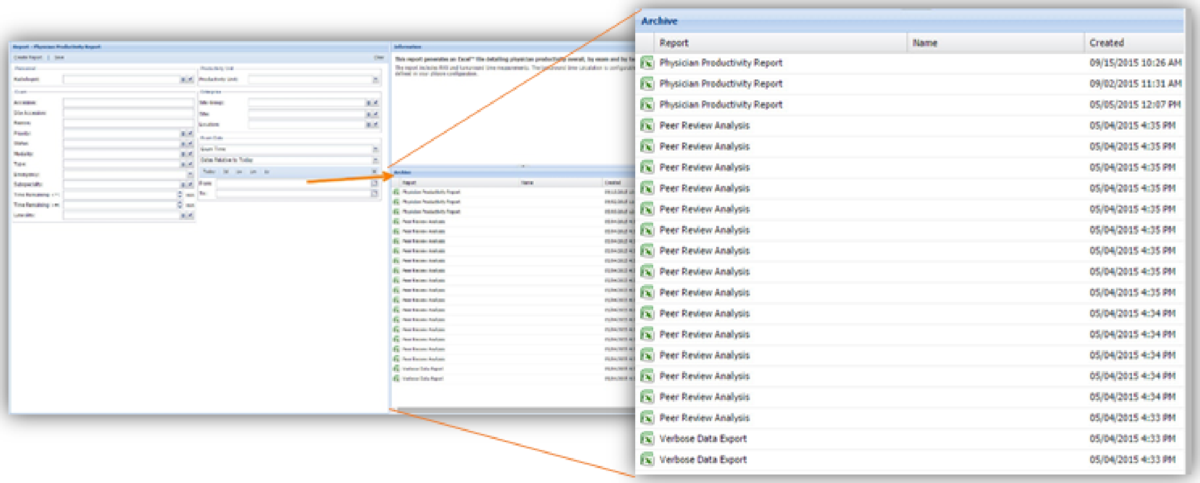
Select the filters needed for the report



Once a report is created, a message will appear on the center of the user's screen:



The report can also be found to the right in list format in the "Archive" field. Select the excel icon to download the report.



Access to Analytics

Clients must ensure that the proper access is given to the analytics module. Because this module houses PHI as well as very important information regarding the practice and radiologist productivity, it is essential to assess the access level given to users.

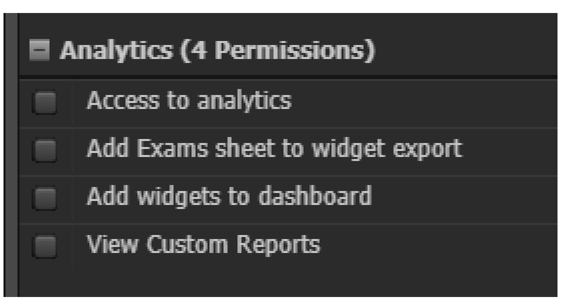
Analytics Access is managed in the Management> User Role Management section of Clario.

Once a user role is in edit mode, or a new user role is being created, the list of all available options for Analytics is housed in three areas:

- Analytics
- Analytics Reports
- Analytics Widgets

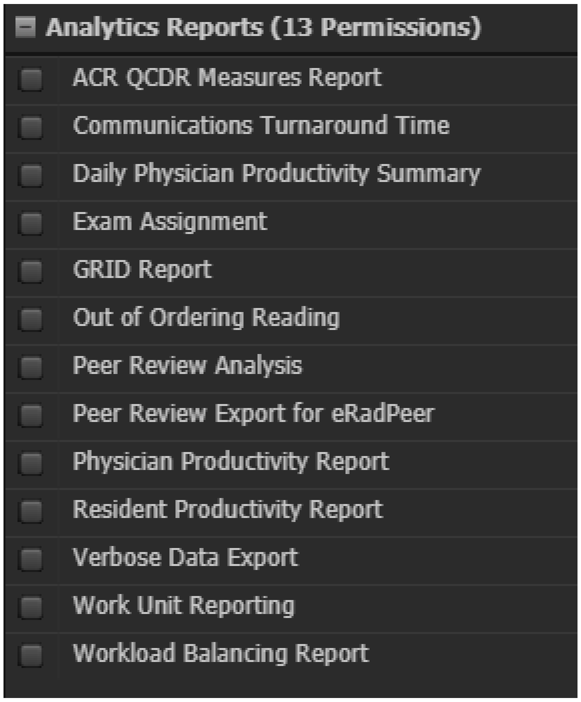
Analytics

In this section, access to the analytics module is granted as well as other overall module functionality. Hovering over the specific user role permissions allows the users to see an explanation of what the user role permission allows.



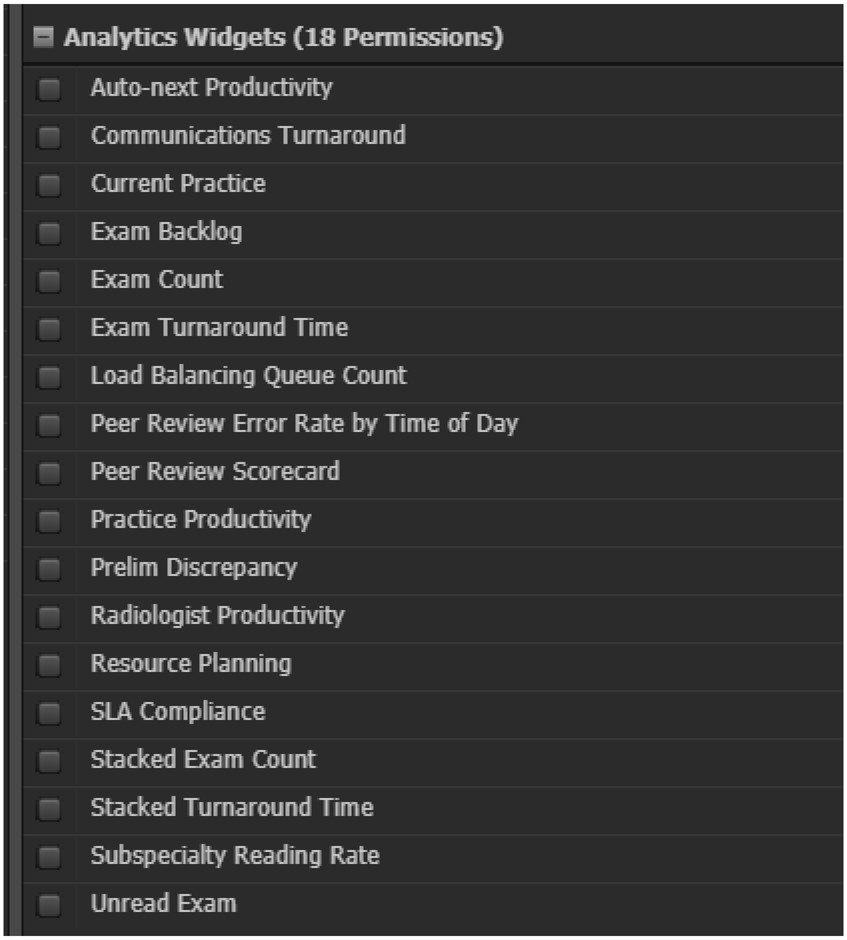
Analytics Reports

In this section, access to the different analytics reports is granted.



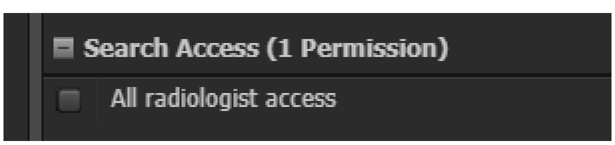
Analytics Widgets

In this section, access to the different analytics widgets is granted.



Limiting Visibility to the User (Search Access)

Remember, a practice may want a user or a radiologist to see only their own analytical data (perhaps for peer review purposes, etc.). If the user is granted access to a specific widget or report within the system, they may still be able to see other user's information if the following user role permission is enabled:



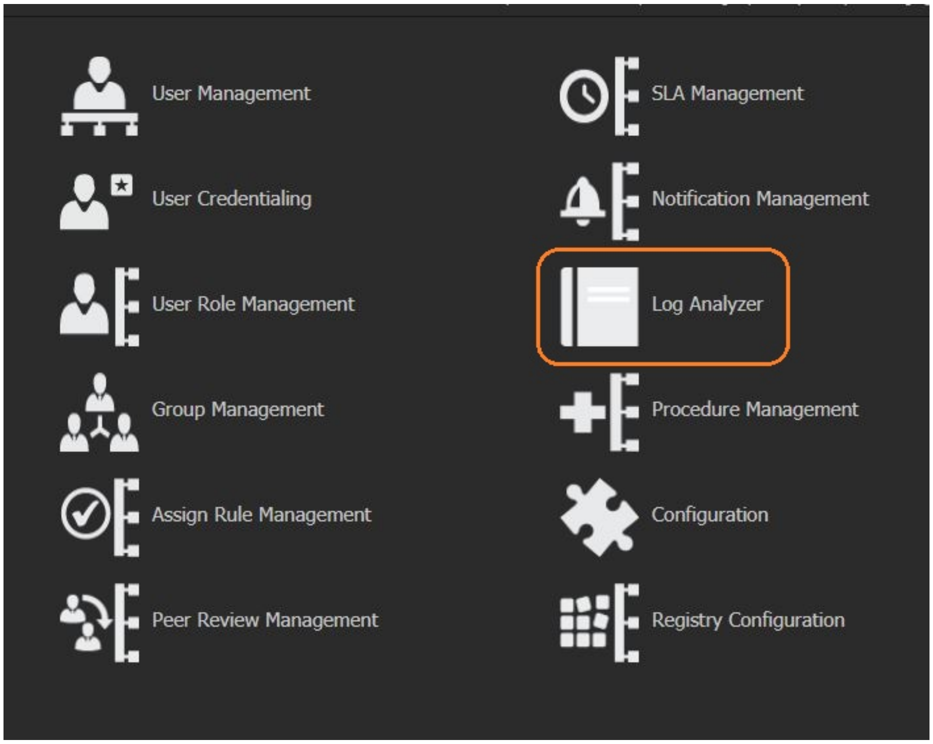
With "All radiologist access" enabled, radiologists are able to see other radiologist's information within the system, to include analytical data. Removing this permission limits the radiologist to only see their information in the system, to include their own analytical data.

Troubleshooting

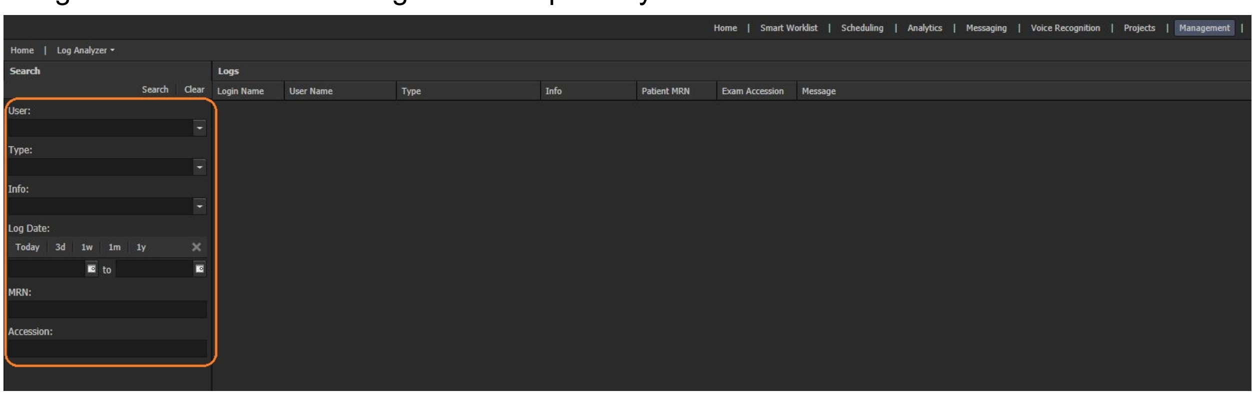
Log analyzer

Clario's log analyzer allows admins to dig deeper into User and Application details to assist with troubleshooting. For instance, you can search a specific user to see what worklist they have created, to see what actions a radiologist took on a given day, to see searches done by users.

To open the log analyzer admins will need to be in the management module and select log analyzer



Once in the log analyzer- admins will need to refine their search - there are six search categories that can be used together or separately.



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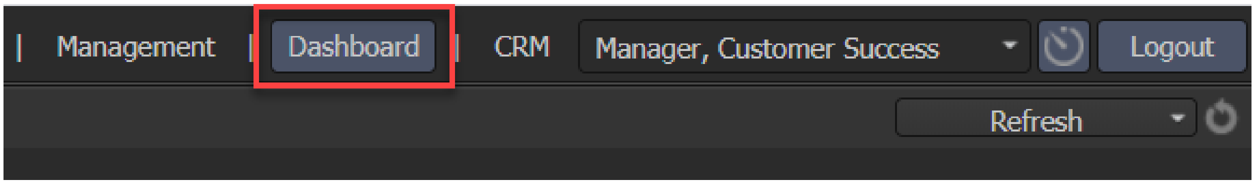
Dashboard

Admins have the access to view Clario's dashboard. To view this, admins will need to select the module.

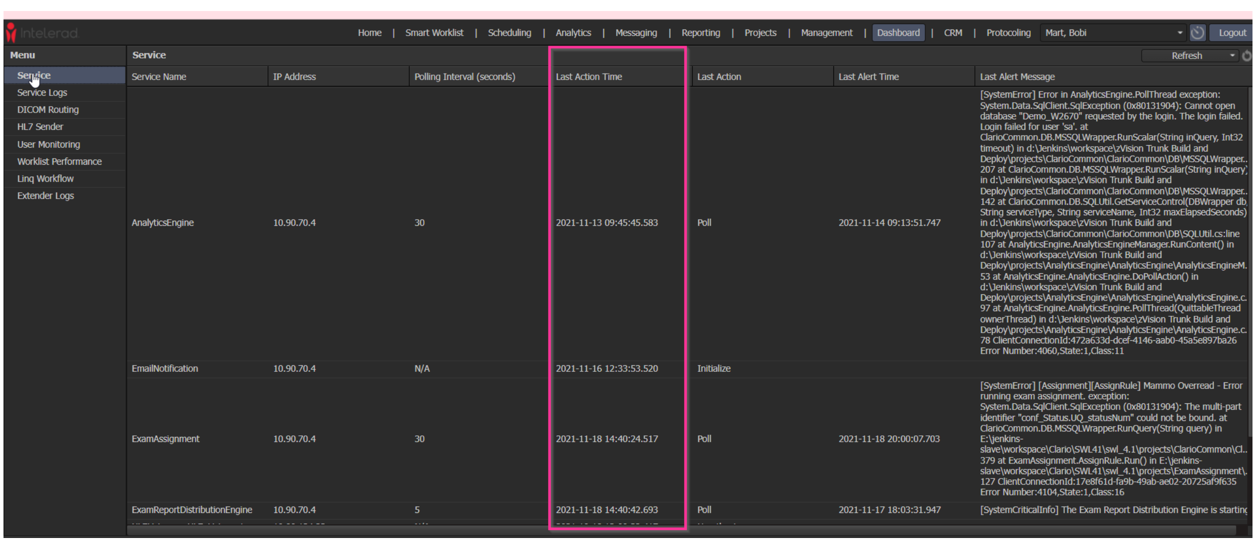


Monitoring SWL Services

All Clario SWL Services (HL7 Listener, Exam Assignment, Integration Daemon, WebSocket, etc) utilize a 'heartbeat' function to update the database with status.
The 'last action' column of the 'heartbeat' table is monitored for any lapses in reporting. If a lapse is detected and alert is triggered.

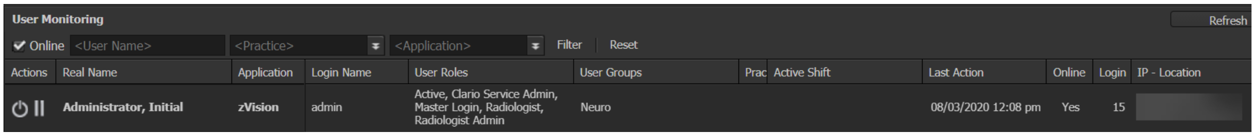
Service

The 'heartbeat' data, including the 'last action' column is available via the 'Services Dashboard'



User Monitoring

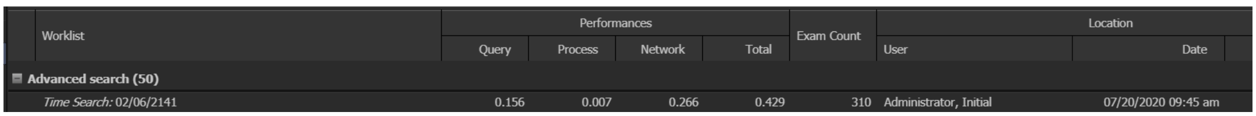
Allows admins to see who is currently logged into the system, if they are logged into a shift, and what IP address they are on.



Worklist performance

Allows admins to run query audits on worklists to ensure the application is running in a timely manner.

In the example below, advanced search for the date of July 6th was run by the user Admin. The query time is how long it took Clario to process the search. Clario automatically color codes anything alarming in the colors of yellow (medium alert) and red (high alert).



Extender

What is Extender (aka: zvExtender)?

The Extender client is a .net application that is installed on every client computer where exams are read. Extender utilizes the WebSocket protocol to communicate with the Clario WebSocket Manager software. The Clario WebSocket Manager is installed on one of the Clario servers located in the data center.

Why is the Extender used?

zvExtender client is required for radiologists to launch viewers and VR when reading exams from the Clario Smart Worklist. zvExtender communicates with multiple viewer, dictation and EHR/EMR client-side/web-based applications to update exams as they are read.

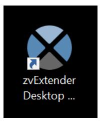
Where is the Extender installed?

Default installation folder is:
C:\Program Files (x86)\Clario Medical\zVision Extender\
Extender logs may be found in the ‘..\logs**’ subfolder**

Interacting with the Extender

Typically users will not need to interact with the Extender. It is configured to start, and remain running, whenever the user logs into Windows. This is accomplished by adding a link to the 'Start up' folder of Windows. This can be confirmed by looking for the Extender icon in the Windows System tray:

If the Extender is not running, users may restart it using the shortcut icon found on the desktop:

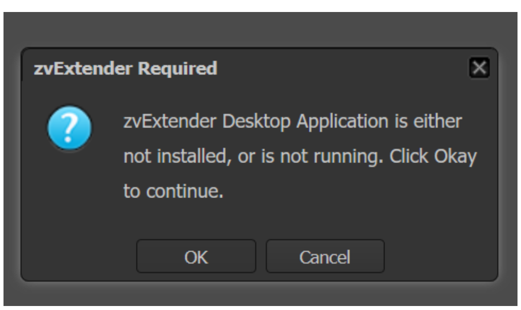


Extender 'right click' options from system tray

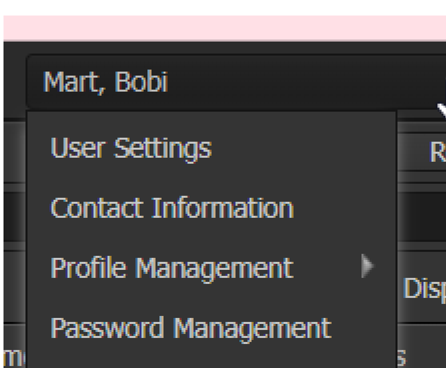
View log - launches a file reader application allowing user to view log in real time
Upload logs- compress & protects the logs to be uploaded into Clario
Clear log - clears the log
Reinitialize - Closes any 3rd party applications configured for use with the Extender (viewers, voice rec, RIS, etc) and resets the Extender.
About - Displays Extender software version

Extender Not Running

If the Extender is not running when the user launches the Worklist page, they will be prompted to download and install



Conversely, the user is able to navigate to the about page to locate the Extender Desktop Installer to initiate installation if the extender does not automatically initiate installation at startup.



Clario Desktop Monitoring Service

The Clario Desktop Monitoring Service (DMS) is a proprietary windows service created to assist network administrators in the distribution and maintenance of the SWL Extender.
The DMS is installed on the client workstation and will run as a service whenever the client workstation is booted.
Administrator privileges are required to install the DMS on the client workstation.

Two functions of the Desktop Monitoring Service

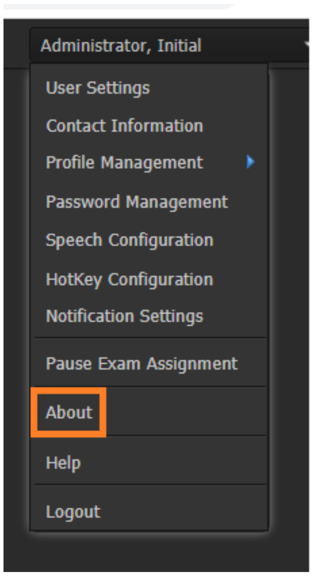
There are two functions of the DMS:

1. Confirms the correct version of Extender is installed. If a newer version is available, it will automatically download and install the new version of the Extender.
2. Ensures the Extender application is always running. This allows for a smoother and much quicker initialization of the Extender when users open the Worklist tab.

Clario SWL Extender - Basic Triage

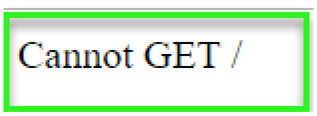
Extender won’t initialize

The Extender requires connection to the Websocket Service. This can be tested by navigating to the ‘About’ panel and selecting ‘Test socket connectivity’.

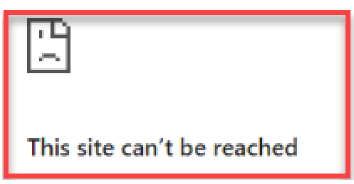


This will attempt a connection to the Websocket Service in a browser tab.

A successful test will result in “Cannot GET/” being displayed.



An unsuccessful test will result in an HTTP 404 error.



Common causes for the Websocket service to fail for individual users:

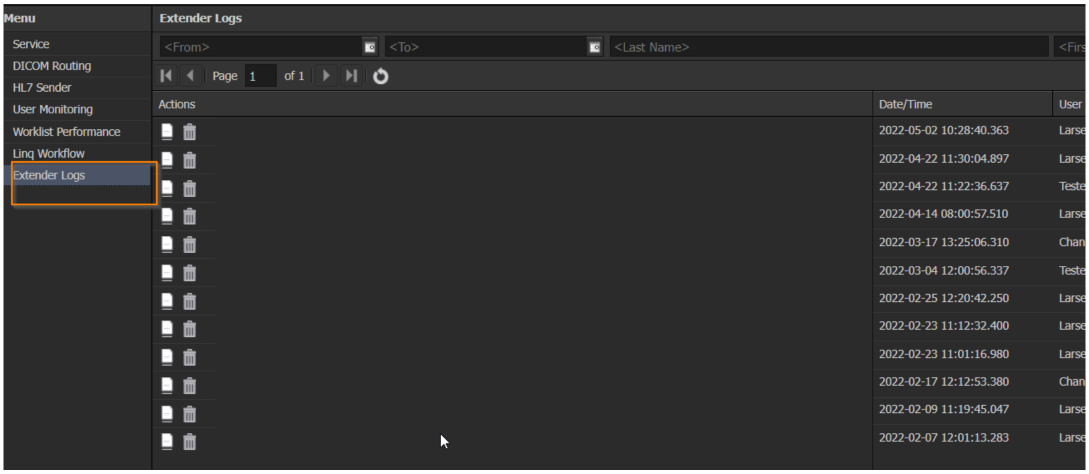
- Network connectivity, blocked port, etc
- DNS resolution of the Websocket URL

Common causes for global Websocket service failure:

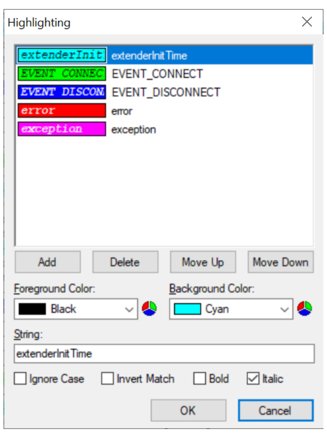
- Certificate expiration
- Websocket service on Server has stopped causing errors (check dashboard)

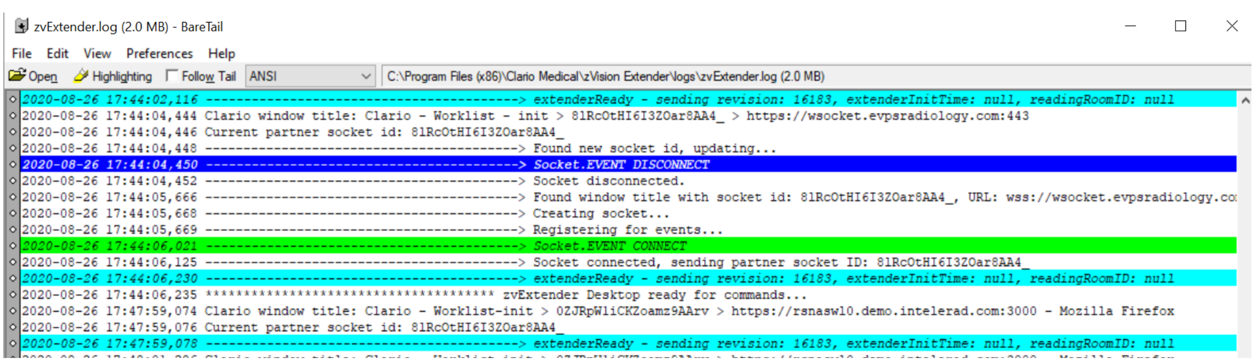
Reviewing the Extender logs

Dashboard > Extender Logs



Common words to search for are error or exception.



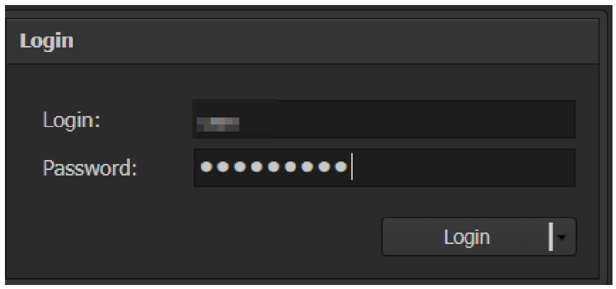


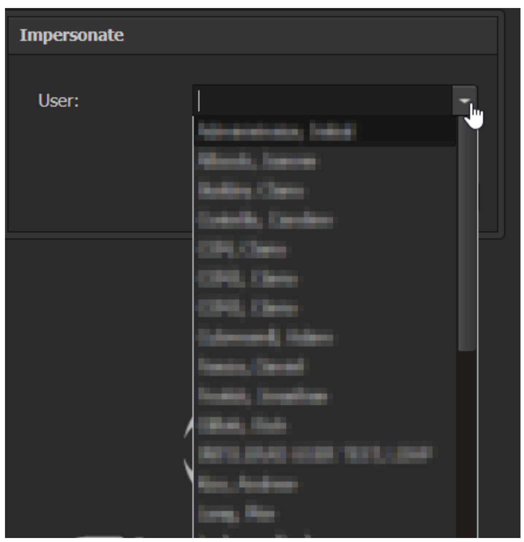
If a user needs to install the zvExtender- they may select their name within Clario and go to the about page and select download the ZV as shown in the screenshot below.

Master Login

If enabled- this user permission allows users to log in as another user in ‘ghost mode. This will allow admins to see the screen the way the end user is seeing the application without impacting assignments or ability to dictate exams.

In order to use master login, when the admin is logging into the application after entering their password, a new empty drop down menu will appear. This will allow the admin to select the specific user they would like to log in as (shown in the screenshot below)





Restore Layout / Clear Confirmation Settings

Restore Layout

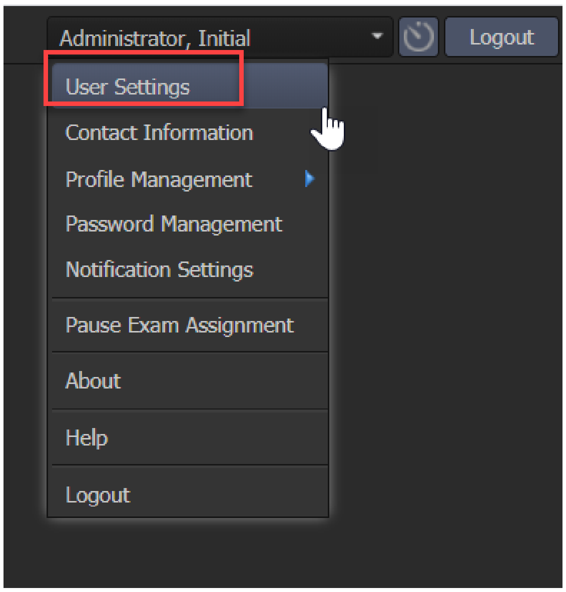
Restore Layout will erase any personal layout settings that the user has saved- this will bring the application back to the default settings for the user. This will only impact one user, not all users. This will impact the column alignment, be sure the radiologist understands they will need to personalize their worklist once this restore is complete.

Clear Confirmation Settings

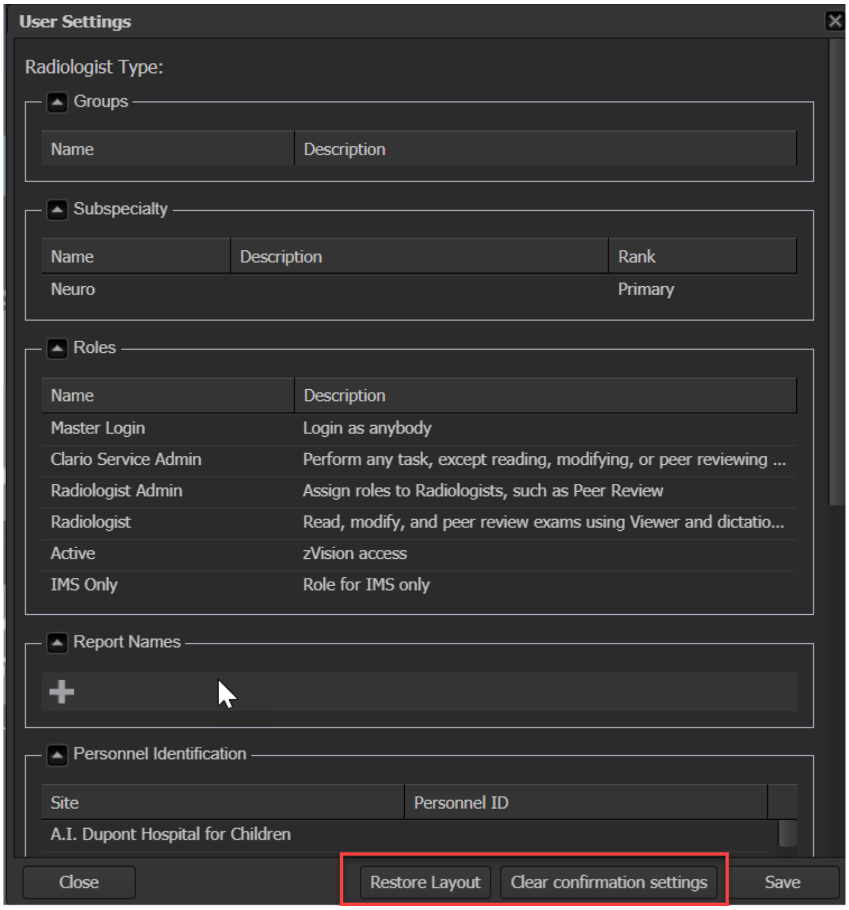
Clear Confirmation Settings will erase any settings that were saved from a pop up box. For instance a pop up box would appear saying ‘Do you always want to do this action’ the end user selects yes, but down the road wants to erase that saved action- this will erase that save.

In order to do either of these actions, admins must be logged in as the user or walk the user through these steps:

Select ‘User Settings’



This will open a new box with some personal user settings.   Towards the bottom of the page users will see the option to restore the layout or clear the confirmation settings. Once this is done though, you can not undo it, the user will need to make their selections again.


User Settings
Radiologist Type:
Groups
Name
Description
Subspecialty
Name
Description
Rank
Neuro
Primary
Roles
Name
Description
Master Login
Login as anybody
Clario Service Admin
Perform any task, except reading, modifying, or peer reviewing ...
Radiologist Admin
Assign roles to Radiologists, such as Peer Review
Radiologist
Read, modify, and peer review exams using Viewer and dictatio...
Active
zVision access
IMS Only
Role for IMS only
Report Names
Personnel Identification
Site
Personnel ID
A.I. Dupont Hospital for Children
Close
Restore Layout
Clear confirmation settings
Save