User Manual

Exo Works®

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Introduction

Introduction

Chapter 1

About this user manual

This user manual is intended to provide instructions for the use of Exo Works® workflow software for the Connect license subscription.

Document conventions

The user manual follows these conventions:

- A **warning** describes precautions necessary to prevent injury or loss of life.
- A **caution** describes precautions necessary to protect the products.
- A **note** provides supplemental information.
- Numbered and lettered steps must be performed in a specific order.
- Bulleted lists present information in list format but do not imply a sequence.
- Single-step procedures begin with ❖.

Getting help

In addition to the information in this user guide, you can contact Exo Technical Support:

Phone 1-833-633-8396

Email exosupport@exo.inc

Web https://support.exo.inc/hc/en-us

Getting Started

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Getting Started

Chapter 2

About Exo Works

Exo Works is an intuitive point-of-care ultrasound (POCUS) workflow solution that lets you seamlessly document, review, store and manage quality assurance (QA) and proficiency tracking for your ultrasound exams in seconds from anywhere. It's accessible from phone or web and easily connects to your existing hospital IT for storage.

Exo Works is a software program that requires an annual subscription. This manual covers what is included in the software subscription for an Exo Works Connect license.

Web and iOS Mobile App

Exo Works is accessible from an Apple iOS mobile app or web browser.

Intended use

Exo Works is intended to provide the tools to manage POCUS exams for medical professionals in a hospital or clinic setting. Users can manage and view ultrasound exams, document exam results, view exam images and image clips, review educational exams, perform quality assurance (QA), and track proficiency for credentialing.

Exo Works supports administrators or directors who manage POCUS programs, credentialed medical professionals who have completed an ultrasound training program defined by the medical institution and use ultrasound for patient care, and non-credentialed medical professionals who are learning or training for certification.

Non-credentialed medical professionals are authorized to collect ultrasound images and document the exam; however, they are not credentialed to sign off on the documentation.

Role-based system

Exo Works is a role-based system where an approved administrator can create users and assign roles with specific access rights. See Roles section for more information.

Connectivity

Exo Works can be configured to automatically archive exams to a Picture Archiving and Communication System (PACS) or Vendor-Neutral Archive (VNA), and/or to the Exo Works Cloud.

Using standard protocols, Exo Works can be configured to connect with a facility's PACS, and user authentication, providing a more streamlined workflow. Process automation makes it easy to manage both clinical and training ultrasound workflows.

Exo Iris and any DICOM-enabled ultrasound can be configured to automatically send ultrasound exams to Exo Works for workflow management.

Cybersecurity

Exo has taken utmost care to prevent possible cybersecurity vulnerabilities throughout the product lifecycle, from production to customer delivery. However, cybersecurity threats, such as malware attacks, could exist with the use of all mobile devices.

Exo Works stores personal health information (PHI), and Exo makes every effort to protect PHI. Security and confidentiality of patient records should be handled according to your institution's clinical procedures. If you do not know what these policies are, contact your information technology (IT) department. It is the sole responsibility of the user that all further data processing or sharing follows legal standards.

Visit Exo's Security Trust Center to learn more about our protocols.

If you suspect a device malfunction due to a cybersecurity incident, notify your IT department, and check to make sure you have installed the latest software updates.

Exo Works configuration

The Exo team can support set up and configuration of Exo Works. Please contact your customer success representative or reach out to us at exosupport@exo.inc.

Organization Management

The administrative portal provides the tools to manage the facility, specialties and users. Configure Smartlink, access the devices and license and setup the user authentication method.

Users with administrative and specialties roles can access the portal from Exo Works Web by selecting the Admin tab.

To learn more about managing your organizations, please refer to Chapter Managing Admin Tasks.

Roles

Each Exo Works user gets assigned at least one specialty and one role per specialty within a facility. A user can be part or multiple specialties and can be assigned multiple roles. Facility and Specialty Admins manage the users and assigned the role(s) for each user.

User Roles

Administrative Roles

- Customer Admin
- Facility Admin

Clinical Roles

- Specialty Admin
- QA reviewers
- Credentialed
- Non-Credentialed

Detailed Role Descriptions

Role	Description
Customer Admin	▪ Serves as the primary contact for the organization. ▪ Each organization can have only one Customer Admin. ▪ Responsible for managing the facility or creating Facility Admins to manage the facility on their behalf. ▪ They can create users and assign Facility Admin and Specialty Admin roles. ▪ They do not have access to the Exo Iris mobile app. ▪ They do not have access to the Exams on the Exo Works web app. ▪ They cannot be deactivated.
Facility Admin	▪ Responsible for setting up and managing the facility's operations including users, specialties, and connections. ▪ Each organization can have multiple Facility Admins. ▪ Facility Admin information can be updated by the Customer Admin. ▪ They cannot create Customer Admins or other Facility Admins. ▪ They do not have access to the Exo Iris mobile app. ▪ They do not have access to the Exams on the Exo Works web app. ▪ They can be deactivated if required.

Role	Description
Specialty Admin	▪ An organization can have multiple Specialty Admins. ▪ Specialty Admin can manage one or many specialties. ▪ Responsible for setting up proficiency programs and workflows for their specialties. ▪ Manages assigned specialties, including clinical users. ▪ Specialty Admin information updates can be managed by both the Facility Admin and the Customer Admin. ▪ If a user is assigned this clinical role, the specialty needs to be specified. This user cannot be assigned QA Reviewer, Non-Credentialed, and Credentialed roles. ▪ They can perform QA reviews and has the authority to document and sign off exams. ▪ They cannot create or modify users but can view user information. ▪ They can access the Exo Iris mobile app. ▪ They can access the Exams and Admin on the Exo Works web app. ▪ They can be deactivated if required.
QA Reviewer	▪ Set up by authorized Specialty Admins. ▪ An organization’s specialty can have one or many QA reviewers. ▪ QA Reviewers can review exams of all specialties they are part of. ▪ QA Reviewer setup is optional and only if the specialty has a review program set up. ▪ QA Reviewer's information updates can be managed by the Specialty admin from the user management module. ▪ They cannot create other users or update their status. ▪ They can access the Exo Iris mobile app. ▪ They can access only Exams on the Exo Works web app. ▪ They can be deactivated if required.
Credentialed	▪ Set up by authorized Specialty Admins. ▪ An organization’s specialty can have one or many Credentialed users. ▪ Credentialed users can sign off exams of all specialties based on their credentialing for the specific specialty. ▪ Credentialed user setup is optional and only if the specialty's exam performing users are not credentialed. ▪ Credentialed user's information updates can be managed by the Specialty admin from the user management module. ▪ They cannot create other users or update their status. ▪ They can access the Exo Iris mobile app. ▪ They can access only Exams on the Exo Works web app. ▪ They can be deactivated if required.

Role	Description
Non-Credentialed	▪ Set up by authorized Specialty Admins. ▪ An organization's specialty can have one or many Non-Credentialed users. ▪ Can perform and document exams, but only within their assigned specialties. ▪ Typically works under the supervision of Credentialed or Specialty Admins. ▪ Non-Credentialed user setup for a specialty is optional and only needed based on the needs of the specialty for performing physicians. ▪ Non-Credentialed user's information updates can be managed by the Specialty admin from the user management module. ▪ They cannot sign off exams. ▪ They cannot create other users or update their status. ▪ They can access the Exo Iris mobile app. ▪ They can access only Exams on the Exo Works web app. ▪ They can be deactivated if required.

Note Users can be created by the Customer Admin and Facility Admin via the Admin page in the Exo Works web application.

Role Combinations and Access

Role(s) Assigned to an Organization's User				Access to		
Customer Admin	Facility Admin	Specialty Admin (Clinical Role)	Other Clinical Roles[1]	**Exo Works Web - Admin**	**Exo Works Web - Exams**	**Exo Iris Mobile App**
x				Yes	No	No
	x			Yes	No	No
		x		Yes	Yes	Yes
			x	No	Yes	Yes
x	x			Yes	No	No
x		x		Yes	Yes	Yes
x			x	Yes	Yes	Yes
	x	x		Yes	Yes	Yes
	x		x	Yes	Yes	Yes
x	x	x		Yes	Yes	Yes
x	x		x	Yes	Yes	Yes

1 **Other Clinical Roles:** Non-Credentialed, Credentialed, QA Reviewer.

Note

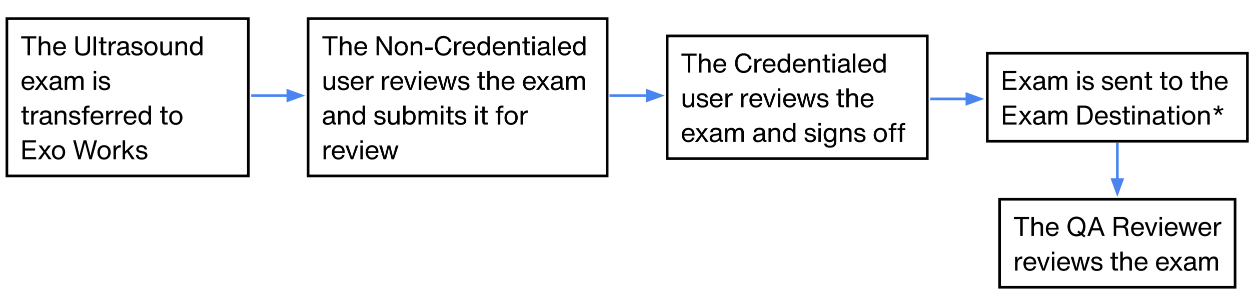
- A user can be assigned multiple roles but only one clinical role (see Clinical Roles on page 12).
- If a user has multiple roles, their access and permissions are dictated by the highest-level role assigned to them.

Exo Works Workflow

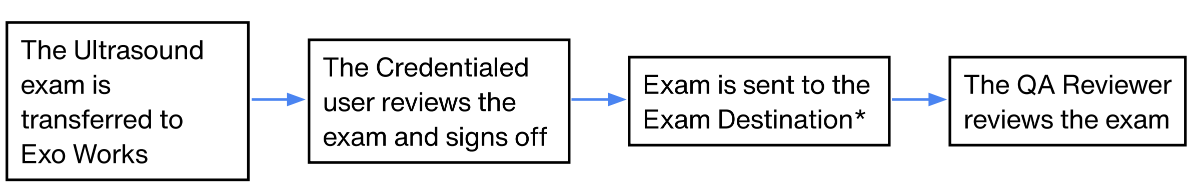
Clinical and Educational workflows

Exo Works workflow management system is an advanced ultrasound workflow manager designed specifically to meet the workflow needs of POCUS users. Exo Works supports both clinical and educational ultrasound workflow solutions. Shown below is a high-level view of each workflow.

Non-Credentialed Workflow



Credentialed Workflow



***Exam Destination:** All exams will be synced to Exo Works Archive. If a PACS is configured by your admin, clinical exams will also be sent to the designated PACS destination. Educational exams will not be sent to PACS.

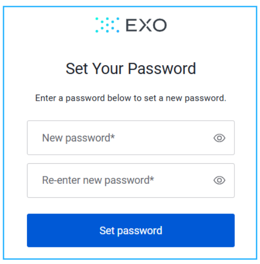
Onboarding and Log In Authentication - Web

As a new user, you will receive a welcome email to register for Exo Works.

Onboarding

TO REGISTER

1. In the Welcome email, click **Setup Password.** This will redirect you to the password setup page.



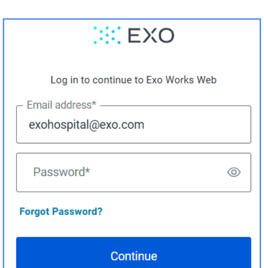
2. Enter your desired password in the **New Password** field.
3. Re-enter your password in the **Confirm Password** field.
4. Click the **Continue**.

Logging in

TO LOG IN

1. Open a web browser and visit the Exo Works login page at https://cloud.exoworks.inc/.

2. In the **Email** field, type the email address associated with your Exo Works account.
3. Select your organization, only necessary if users belong to multiple organizations. Otherwise, skip this step.



4. In the **Password** field, enter the password that you setup using the link provided in the Welcome email (only applicable if using Auth0 authentication).

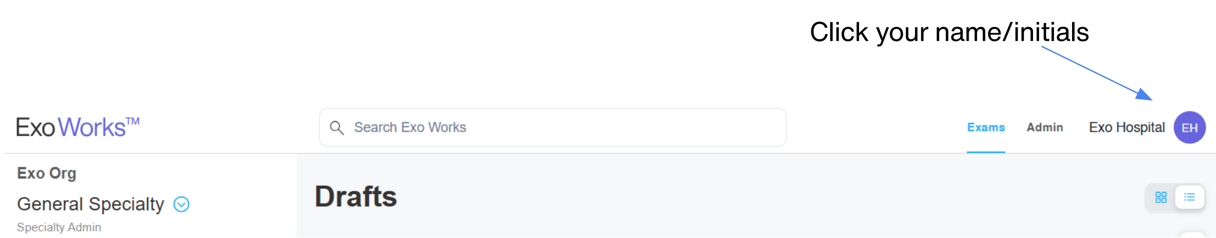
Note	If you are an SSO user, please contact your Admin for account setup.

5. Click **Continue**.
6. Review and agree to the Exo **Terms of Use** and **Privacy Policy**; click **Continue**.
7. Select your **Specialty** (only applicable if you belong to multiple specialties). The specialty selected will become your preferred specialty that is, you will be redirected to this specialty upon subsequent logins.
8. You will be redirected to the Home page for Exo Works web App.

Logging out

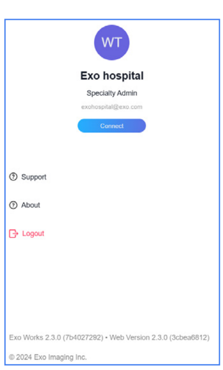
TO LOG OUT

❖ Click on name or initials displayed in the top right corner of the Exo Works screen, and select **Logout**.



Profile

Access your profile page by clicking name or initials displayed in the top right corner of the Exo Works screen. Here you will find:



- User name, User Role and License associated to your account.
- **Support:** How to contact Exo Support and access to user manual.
- **About:** Terms and conditions, privacy policy and the Exo app version.
- **Logout:** Logs out the user.

Onboarding and Log In Authentication- Mobile

As a new user, you will receive a welcome email with instructions to register for Exo Works. The email will guide you through the onboarding process and provide a link to download the mobile app.

Downloading and Setting Up Exo iris App

TO DOWNLOAD AND SET UP IRIS APP

1. Install the **Exo Iris** app from the Apple App Store on your iPhone.
2. On the Welcome page, tap **Let's Go!**.
3. Enter your email address and tap **Continue**.
4. Select your **organization**, if applicable (only required for users belonging to multiple organizations).
5. Enter the password you set up using the link in your welcome email (applicable if using Auth0 authentication).

Note	If you are an SSO user, please contact your Admin for account setup.

6. Set a **6-digit PIN** to secure your account.
7. Optionally, set up quick access with **Face ID** or **Touch ID** (if supported by your phone) and tap **Continue**.
8. Review and agree to the **Exo Terms and Conditions** and **Privacy Policy** and tap **Continue**.
9. Optionally, select an avatar by tapping **Edit** and choosing a photo from your library, or tap **Skip** if you don't want an avatar.

Note	You can add or update your profile picture later from the profile menu.

10. Select your **specialty** (if applicable) to set it as your preferred specialty. You'll be redirected to this specialty upon future logins.
11. Tap **Begin** to enter the Exo Works app.

Logging in to the Exo Iris App

TO LOG IN TO THE EXO IRIS APP

1. Open the **Exo Iris** app on your phone.
2. Enter your **username** and **password**.
3. Enter your **PIN**.

Note

- If you forgot your password, enter your email and select Password Reset on the login screen.
- After five failed login attempts, your account will be locked. Check your email for instructions to unlock your account.
- For SSO users, contact your IT Admin for login assistance.

Note

The mobile app is timed out after 5 mins of inactivity or when the app is put in the background. To resume the session, user must enter their PIN, Face ID or Touch ID depending on the biometric setting, selected during onboarding.

Logging out of the Exo Iris App

TO LOG OUT OF THE EXO IRIS APP

1. Tap your **Profile** icon in the upper-right corner of the screen.
2. Select **Logout**.
3. At the prompt, tap **Logout** again to confirm.

Profile

Access your profile page by tapping on the profile icon. Here, you can find helpful information:

- User name, User Role, email and License associated to your account.
- **Support:** How to contact Exo Support and access to user manual.
- **About:** Terms and conditions, privacy policy and the Exo app version.
- **Settings:** Includes Exo Iris, PIN setup, Exo Works Archive, PACS server and modality worklists, exam policy settings, and app logs.
- **Logout:** Logs out the user.

Installing Updates for Exo Iris App

For optimal performance, ensure you are always using the latest version of the Exo Iris app and firmware for imaging. Regularly check for updates on the Apple App Store and follow any in-app prompts to install new firmware.

Offline Mode in Exo Iris App

When the Exo Iris app is not connected to the internet, you can still perform the following actions in offline mode (you must sign in at least once to enable offline mode):

- Scan
- Save **images** and **clips**
- Complete **worksheets**
- Save exams to the **Drafts** folder

However, the following actions are unavailable in offline mode:

- Access **Support**
- View or access **completed exams**
- Transfer exams to **PACS** or **Exo Archive**
- Access the **Worklist**
- Share, favorite, or delete **exams**

Managing Admin Tasks

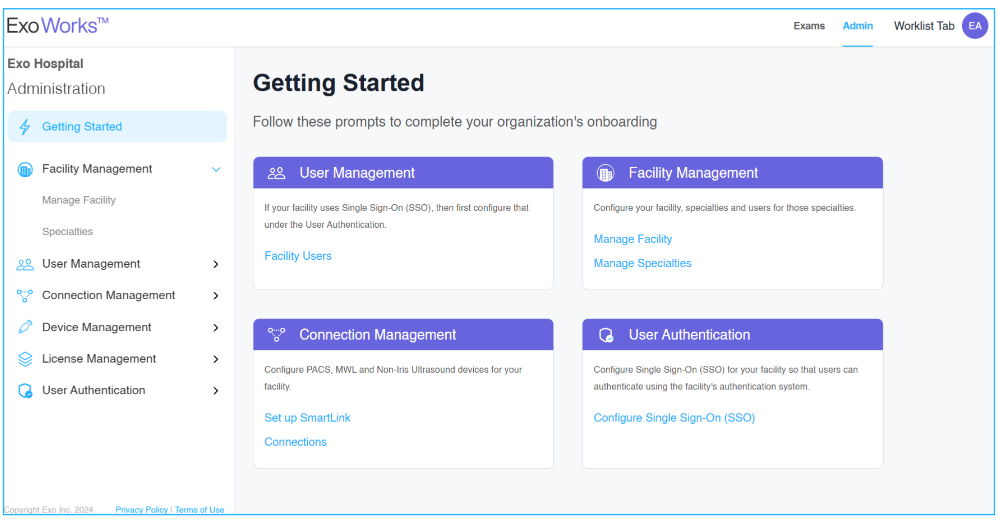
3

Managing Admin Tasks

Chapter 3

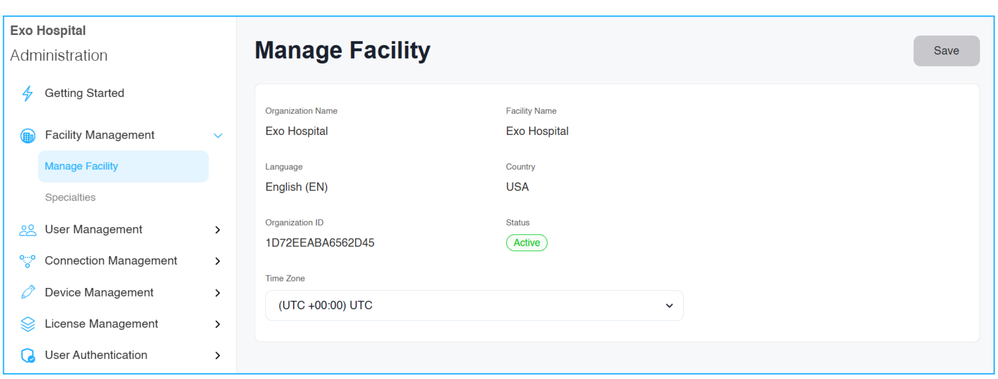
The Exo Works Admin Portal serves as a centralized management hub for organizations. Within this portal, admins can oversee facilities, manage devices and licenses, configure SmartLink, define specialties, create and manage user accounts, and setup the user authentication protocols.

To access the Admin Portal, log into the Exo Works web application with the appropriate administrative credentials (Customer Admin, Facility Admin, or Specialty Admin) and then select the **Admin** tab.



Facility Management

Managing Facility



The Manage Facility section provides detailed information about your facility, including:

- **Organization Name:** The official name of your organization.
- **Facility Name:** The specific name of the facility you're managing.
- **Language:** The primary language used within your facility.

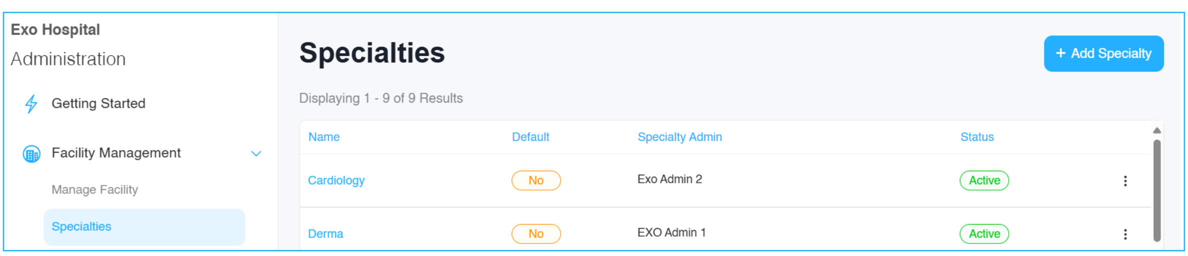
- **Country:** The country in which your facility is located.
- **Organization ID:** A unique identifier for your organization.
- **Status:** The current status of your organization (e.g., active, inactive).
- **Time Zone:** The time zone in which your facility operates.

Note	All fields except for Time Zone are view-only. To modify any field other than Time Zone, please contact Exo Customer Support.

TO CHANGE TIME ZONE

1. Navigate to **Admin** tab.
2. Select **Facility Management**, then click on **Manage Facility.**
3. Go to **Time Zone** section and select the appropriate time zone for your facility from the available options.
4. Click **Save**.

Managing Specialty



TO ADD A SPECIALTY

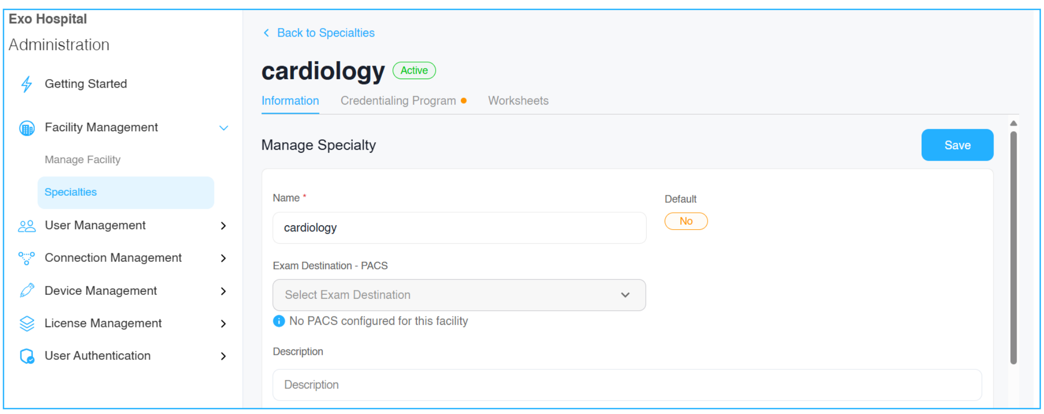
1. Navigate to **Admin** tab.
2. Select **Facility Management**, then click on **Specialties**.
3. Click **+Add Specialty**.
4. Fill the required Fields:
   - **Name:** Enter name for the specialty.
   - **Specialty Admin:** Assign an existing user to be the administrator for this specialty.
   - **Description:** Enter description of the specialty.
   - **Default Specialty (Optional):** Check this box if you want this specialty to be the default selection for users within this organization.
5. Click **Add Specialty** to save the new specialty.

TO MODIFY DEFAULT SPECIALTY

1. Navigate to **Admin** tab.
2. Select **Facility Management**, then click on **Specialties**.
3. Choose the specialty you want to set as the default.
4. Click ⋮ and choose **Make Default**.

Exam Destination

By default, completed exams are stored in the Exo Works Archive. If your specialty has a PACS connection configured through SmartLink, you can add PACS to the exam destination to store exams in both the Exo Works Archive and PACS.



TO CHANGE THE EXAM DESTINATION

1. Navigate to **Admin** tab.
2. Select **Facility Management**, then click on **Specialties**.
3. Choose the desired Specialty.
4. Click ⋮ and select **Edit**.
5. In the Exam Destination - PACS field, select the appropriate PACS connection.
6. Click **Save**.

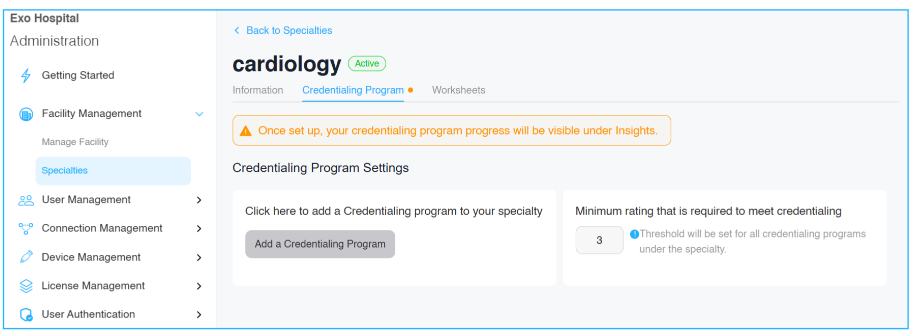
Note	The chosen destination will apply to all completed clinical exams for that specific specialty. Educational exams will not be moved to PACS.

Credentialing Program

Credentialing program ensures doctors are skilled and competent in performing medical procedures. It involves assessing, training, and monitoring doctors to maintain high standards of quality and safety in healthcare delivery. This process helps train users to become credentialed once they have completed a certain number of exams.

The Exo Works credentialing program allows the specialty admin to configure the number of exams to complete per exam type as well as a the number of true positives and false negatives. The exam criteria are set per exam type. Facility and Specialty admins can access the Exo Works Admin portal and setup the credentialing program.

The credentialing can be configured for each specialty and will apply to all the non-credentialed users within that specialty. The minimum rating value to meet credentialing is set to 3. The credentialing program progress will be available in the Insights tab for Web and Mobile.



TO CREATE A CREDENTIALING PROGRAM

1. Navigate to **Admin** tab.
2. Select **Facility Management**, then click on **Specialties**.
3. Select the desired Specialty.
4. Go to the **Credentialing Programs** section.
5. Click **Add a Credentialing Program**.
6. Enter a Title for the program.
7. Choose either **Credentialed** or **Non-Credentialed**.
8. Click **Add Credentialing Program**.

TO ADD AN EXAM CRITERIA

1. Go to the **Credentialing Programs** section.
2. Select the desired credentialing program.
3. Click **Add Exam Criteria**.
4. Choose the Exam Type.
5. Enter the required number of exams, True Positives, and True Negatives (ensure the sum of True Positives and True Negatives equals the total number of exams).
6. Click **Add Exam Criteria**.

Modifying a Credentialing Program

TO MODIFY

1. Navigate to **Admin** tab.
2. Select **Facility Management**, then click on **Specialties**.
3. Select the desired Specialty.
4. Go to the **Credentialing Program** section.
5. Select the program you want to modify.
6. Adjust the necessary settings.
7. Click **Save**.

> **Note**
> - Only two credentialing programs can be created per Specialty: one for Credentialed users and one for Non-Credentialed users.
> - Once a user role is assigned to a program, it cannot be changed for that Specialty.
> - The assigned exam types will be displayed within the program.

Earning Exam Credit for Credentialing Program

Minimum Rating Requirement:

- The credentialing program specifies the minimum rating needed to earn credit for performing scans and documenting patient information.
- Ratings typically range from 1 to 5.

Example: If the minimum rating is set to 3, you will not earn credit if the QA reviewer rates your work as 2.

Determining Credits Earned:

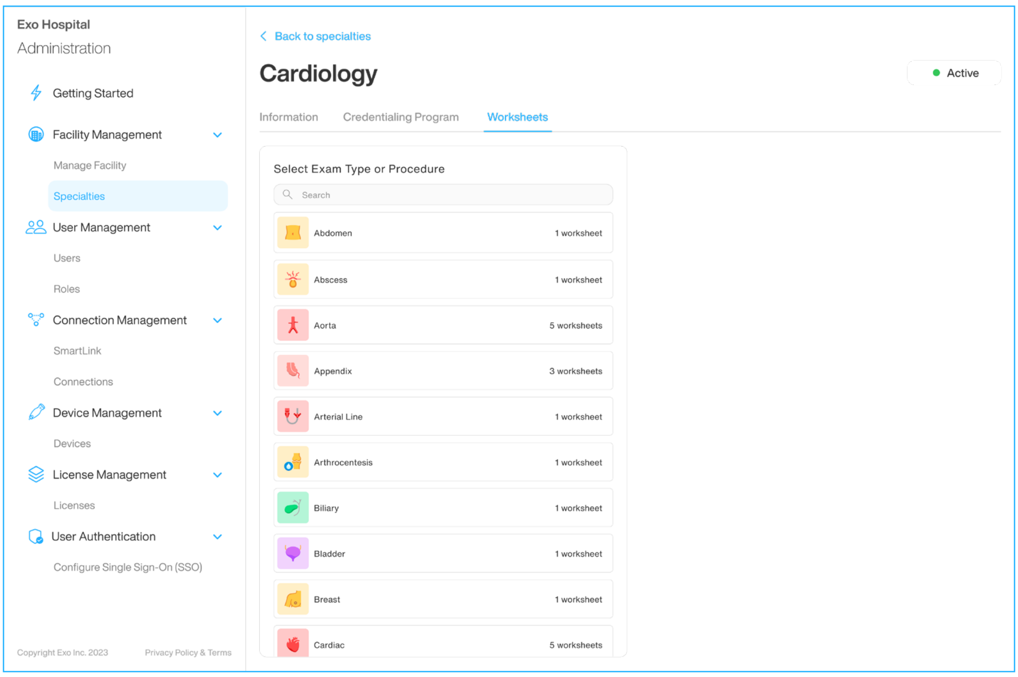
- Credits are based on:
  - The number of exams performed.
  - The required number of true positive or true negative outcomes.

Credentialing Eligibility:

- After accumulating the required credits:
  - You become eligible for credentialing in the specific exam type.
  - This requires passing enough QA evaluations and meeting the credit requirements.

Managing Worksheets

Specialty Admins have the ability to duplicate existing worksheets and customize them to fit the specific needs of their specialty. Default worksheets in Exo Works cannot be modified or deleted.



TO CUSTOMIZE A WORKSHEET

1. Navigate to **Admin** tab.
2. Select **Facility Management**, then click on **Specialties**.
3. Select the desired Specialty.
4. Go to the **Worksheets** tab.
5. Choose the desired exam type.
6. Select the worksheet you want to customize and click the **>** arrow.
7. Click **Edit**.
8. Enter a new name for your customized worksheet (it cannot be the same as the default).
9. Select **Yes** to make this worksheet the default for the exam type, else select **No**.
10. Click **Continue**.
11. Customization options:
    - **Indications:**
        - Add new indications by clicking **New Indication +** and type the indications to add.
        - You can add up to 10 indications (including default).
        - Default indications can be rearranged but not deleted.

- **Views:**
  - Add new views by clicking **New View +** and type the views to add.
  - You can add up to 10 views (including default).
- **Findings and Interpretations:**
  - Add new findings by clicking **New Finding** and type the findings to add.
  - Click **+ Option 1** to add general interpretations.
  - Click **Nested Findings** to add sub-findings.

12. Once you've made your changes, click Save to preserve your customized worksheet.

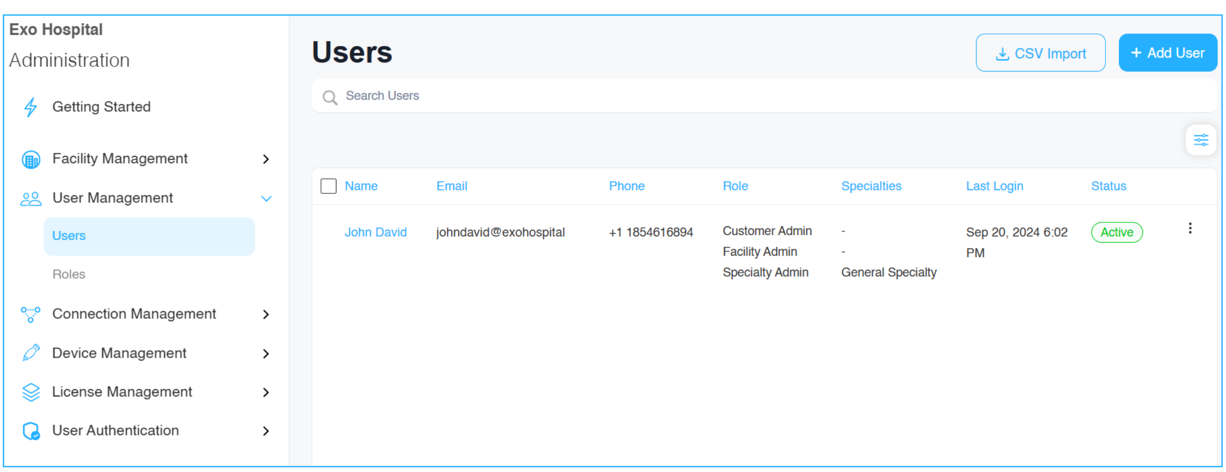
Note

- The new worksheet template will only be applied within the specified Specialty and will not affect other Specialties or the organization.
- Specialty admin can only edit worksheets for their own specialty.

Caution

Before saving customized worksheets, ensure all entered information is accurate. Once saved, the worksheet cannot be modified.

User Management



Adding a User

TO ADD A USER

1. Navigate to **Admin** tab.
2. Select **User Management**, then click on **Users**.
3. Click **Add User** to create a new user.
4. Enter the first name, last name, email address, and phone number in the popup window.
5. Click **Add User**.

Adding Users Using CSV Import

TO DOWNLOAD CSV TEMPLATE

1. Navigate to **Admin** tab.
2. Select **User Management**, then click on **Users**.
3. Click on **CSV Import**.
4. Click **Download template** to get a preformatted file. Fill in the required fields and save it.

TO ADD USERS USING CSV IMPORT

1. Go to the **Admin** tab.
2. Select **User Management**, then click on **Users**.
3. Click on **CSV Import**.
4. If needed, click **Download template** to download CSV import template.
5. Upload the CSV File:
   - **Option 1:** Click the **Import File** to select and upload your CSV file.
   - **Option 2:** Drag and drop the CSV file into the designated area.
6. Click **Add Users** to start the import process.
7. Validation:
   - If the CSV file is valid and the data is correct, you will see a success message with the number of users added.
   - If there are errors, review the file format and data entries, then correct and try again.

> **Note** Ensure the CSV file follows the correct format and includes all necessary details, such as usernames, email addresses, and roles. Refer to the downloaded template for specific field requirements.

Modifying a User

Note

- The Customer Administrator's information is read-only and cannot be modified.
- Reassigning another user as a Customer Admin within Exo Admin is not supported via application. To request this change, please contact Exo Support at exosupport@exo.inc.

TO MODIFY A USER

1. Navigate to **Admin** tab.
2. Select **User Management**, then click on **Users**.
3. Click on name of the user to update.
4. Edit the first name, last name, and phone number in the popup window.
5. Click **+ Assign Role.**
6. Select **Role, Specialty** and **Exams** from the dropdown list.
7. Click **Save**.

Bulk Edit of Users for updating Roles, Specialties

As an admin you can efficiently manage multiple users within Exo Works by using the bulk edit feature. This allows for quick updates to user roles and Specialties.

TO BULK EDIT USERS

1. Navigate to **Admin** tab.
2. Select **User Management**, then click on **Users**.
3. Use filters or select individual users to identify the group you want to edit.
4. Click the **Bulk Edit** button.
5. Modify the desired **Roles**, **Specialties and Exam types (if applicable)** for the selected users.
6. Click **Assign Role** to add more roles to the selected users (maximum of 5 roles per user).
7. Click **Save** to apply the bulk edits to the selected users.

Note

- This feature streamlines user management by allowing you to make changes to multiple users simultaneously.
- Ensure that the selected users and the assigned roles and Specialties are accurate before saving the changes.

Deactivating a User

To deactivate a user, the user's account must first be paused. Once paused, you can proceed with deactivation.

TO PAUSE A USER

1. Navigate to **Admin** tab.
2. Select **User Management**, then click on **Users**.
3. Select the user to deactivate and click ⋮ .
4. Select **Pause User**.

TO UNPAUSE A USER

1. Navigate to **Admin** tab.
2. Select **User Management**, then click on **Users**.
3. Select the user to deactivate and click ⋮ .
4. Select **Un-Pause User**.

TO DEACTIVATE A USER

1. Navigate to **Admin** tab.
2. Select **User Management**, then click on **Users**.
3. Select the user to deactivate and click ⋮ .
4. Select **Deactivate User**.

Note	To deactivate a user, the user must be paused. Once a user is deactivated, the action cannot be undone.

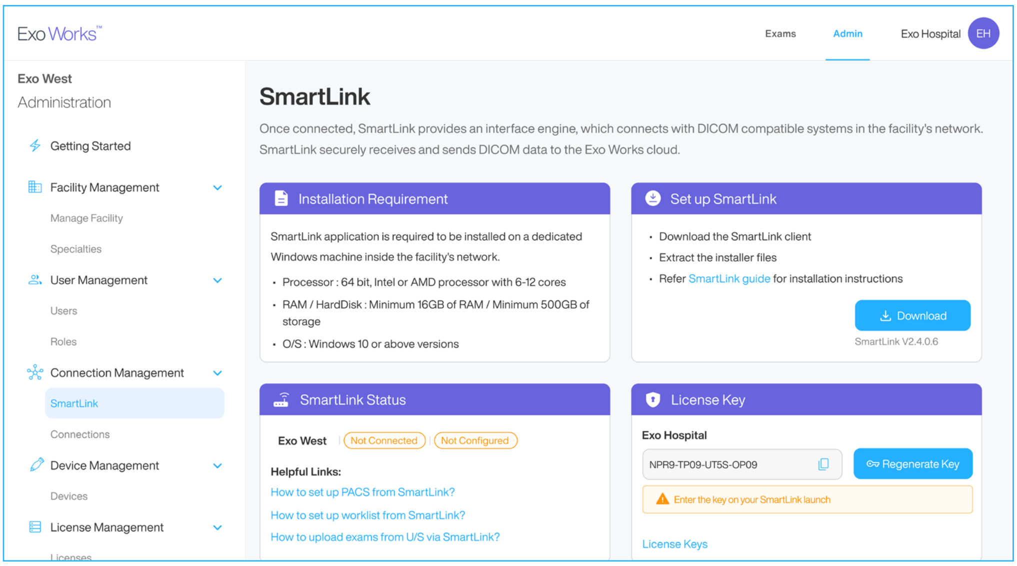
Changing Non-Credentialed to Credentialed User

Once users meet the proficiency requirements and are eligible for credentialing, administrators must confirm their status by reviewing their insights.

TO CHANGE A NON-CREDENTIALED USER TO CREDENTIALED USER

1. Navigate to **Admin** tab.
2. Select **User Management**, then click on **Users**.
3. Locate the user transitioning from non-credentialed to credentialed.
4. Click ⋮ and choose **Edit User**.
5. In the **Roles Assignment** section, find the user's specialty.
6. Under the Exams section, select the exam types for which the user should be credentialed.
7. Click **Save**.

Connection Management



SmartLink

SmartLink is a software platform that securely connects medical imaging devices and systems within your facility's network. SmartLink facilitates the smooth transfer of medical image data between ultrasound machines, worklist management, cloud storage, and image archiving systems.

Installation Requirements

To ensure optimal performance, SmartLink should be installed on a dedicated Windows server machine within your facility’s network. Please verify that your system meets the following minimum requirements:

- **Operating system:** Windows 10 or later
- **Processor:** 64-bit, Intel or AMD processor with 6-12 cores
- **RAM:** 16 GB
- **Hard disk space:** Minimum 500 GB available storage

Note

- The SmartLink application is currently designed exclusively for Windows operating systems. As of this version, the application does not support other operating systems such as macOS, Linux, or any mobile platforms.
- The process of downloading, installing, and configuring SmartLink should be performed exclusively by the Facility Admin. Other admin roles do not have access to these actions.

Download and Install SmartLink

TO DOWNLOAD SMARTLINK

1. Navigate to **Admin** tab.
2. Select **Connection Management**, then click on **SmartLink**.
3. In the **Set up SmartLink** section, locate the **Download** button and click it.
4. The download process will begin. A ZIP file containing the SmartLink installation package will be downloaded to your computer.

TO EXTRACT THE SMARTLINK INSTALLER ZIP FILE

1. Open your computer's file explorer and navigate to the folder where you saved the downloaded SmartLink Installer ZIP file. This is typically the **Downloads** folder.
2. Right-click on the SmartLink Installer ZIP file.
3. In the context menu, choose **Extract All....** option. This will open the **Extract Compressed (Zipped) Folders** wizard.
4. The wizard will prompt you to select a destination folder for the extracted files. You can choose a new location or use the suggested default.
5. Click **Extract** to begin extracting the files.

Once the extraction process is complete, you will find the extracted SmartLink installation files in the specified location.

Note	The exact steps might vary slightly depending on your operating system and file compression software.

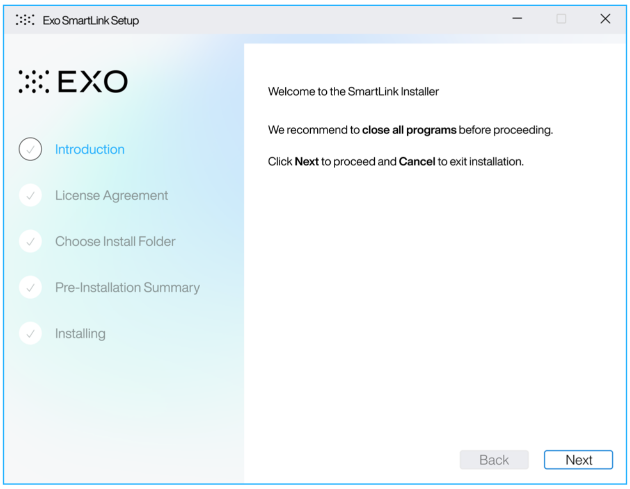
Caution	▪ Do not attempt to install the software without extracting the zip file. ▪ Do not change or rename the downloaded files.

TO INSTALL SMARTLINK

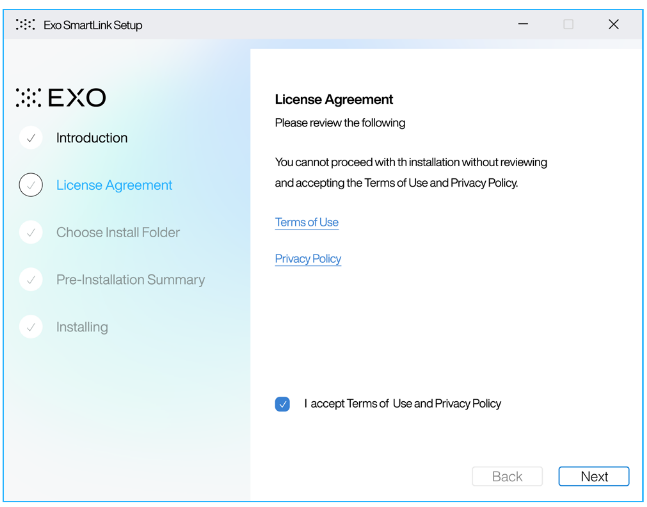
Note	▪ You might encounter a User Account Control prompt during the installation process. If so, please select **Yes** or **Continue** to proceed.

To install the SmartLink application, follow these steps:

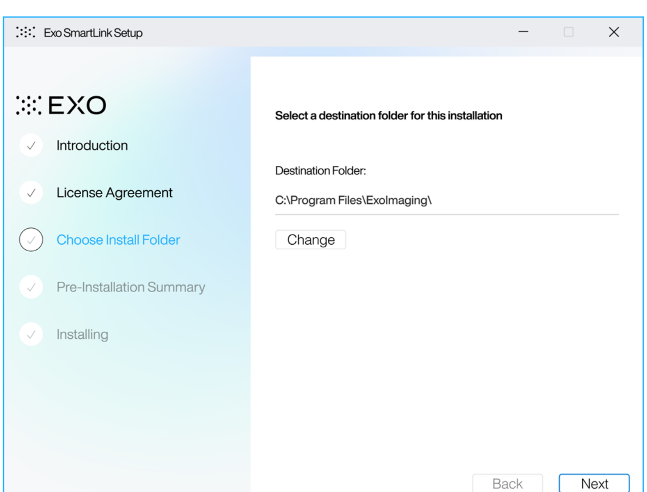
1. Locate the folder where you extracted the SmartLink installer files. Double-click the **installer** icon to initiate the installation process.
2. An Introduction window will appear. Click **Next** to proceed.



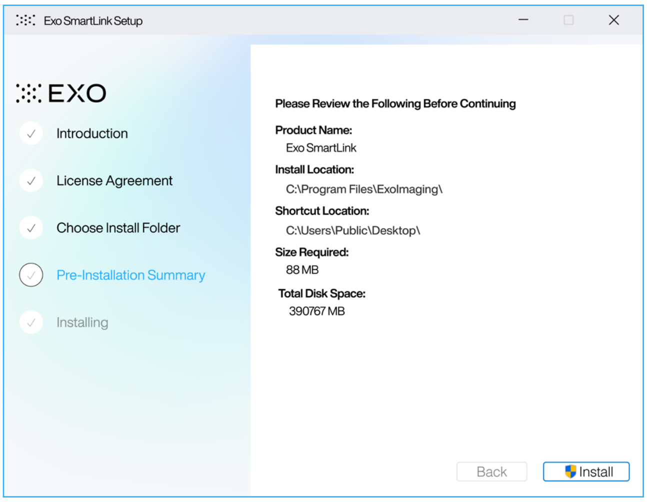
3. Carefully review the software license agreement, including the **Terms of Use** and **Privacy Policy**. Indicate your acceptance by checking the **I accept Terms of Use and Privacy Policy** box and click **Next**.



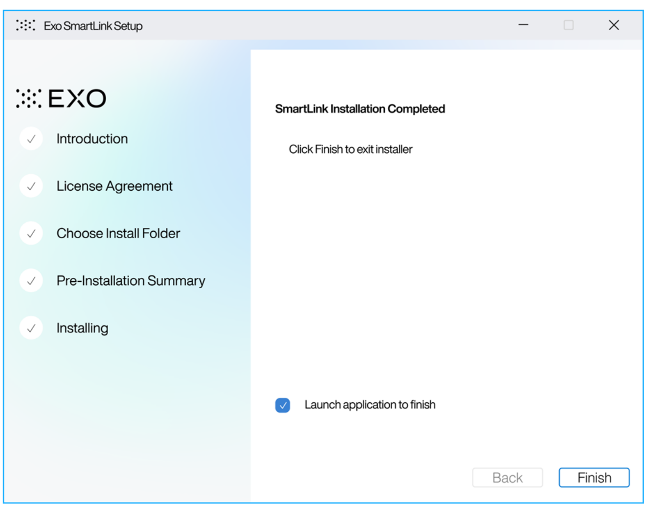
4. Select the preferred location for installing SmartLink. You may choose the default location or specify a different one by clicking **Change**.
5. Click **Next**.



6. Review the installation summary to ensure the settings are correct. Click **Install** to begin the installation process.

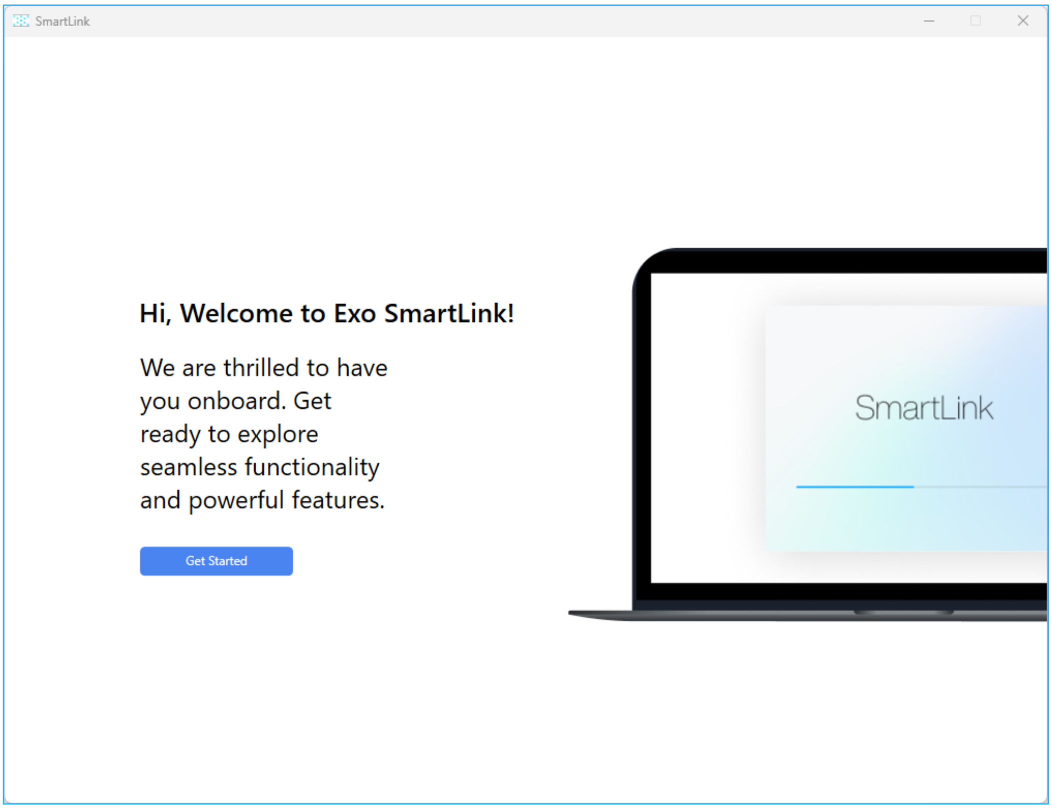


7. Wait for the installation to finish. When completed, click **Finish** to close the installation wizard.



SmartLink's Interface

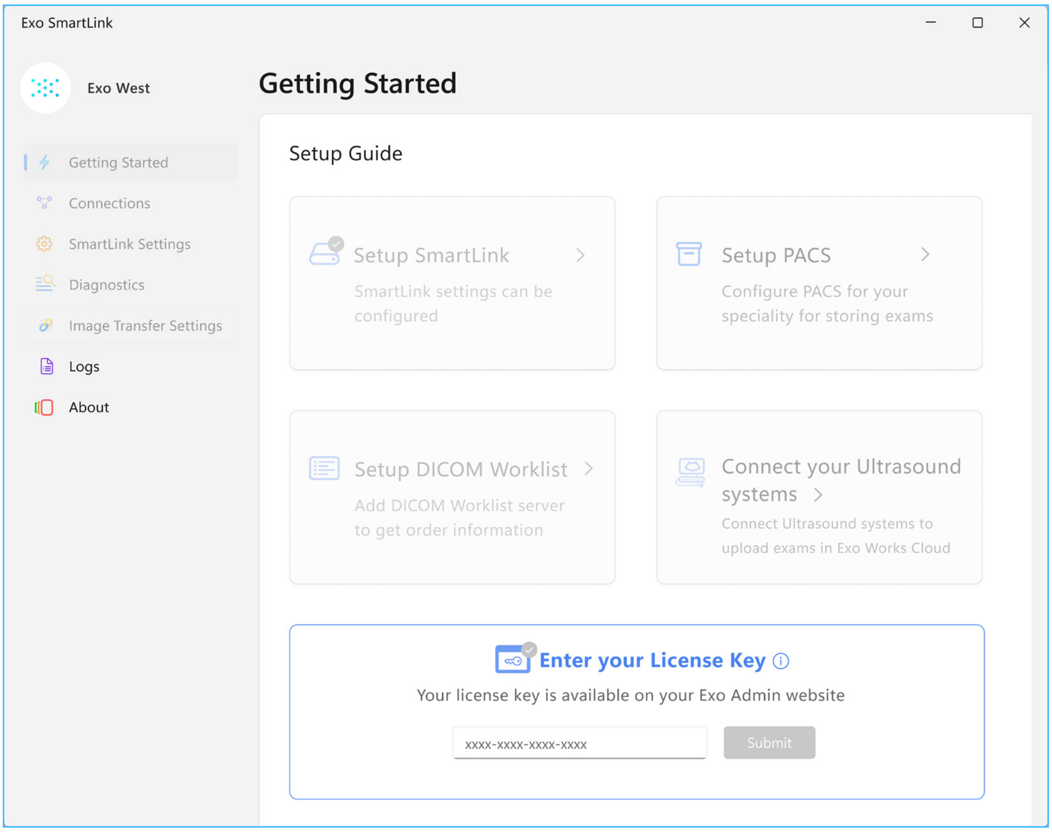
The first time you open the SmartLink application, you will be presented with a welcome screen. To proceed, click **Get Started**.



For subsequent openings of the SmartLink application, the welcome screen will not appear. You will be directly taken to the main application homepage.

The SmartLink homepage is the main entry point for accessing the application's core functionalities. The left panel navigation menu provides access to the following key areas:

- Getting Started
- Connections
- SmartLink Settings
- Diagnostics
- Image Transfer Settings
- Logs
- About


Exo SmartLink
Exo West
Getting Started
Getting Started
Connections
SmartLink Settings
Diagnostics
Image Transfer Settings
Logs
About
Setup Guide
Setup SmartLink
SmartLink settings can be configured
Setup PACS
Configure PACS for your speciality for storing exams
Setup DICOM Worklist
Add DICOM Worklist server to get order information
Connect your Ultrasound systems
Connect Ultrasound systems to upload exams in Exo Works Cloud
Enter your License Key
Your license key is available on your Exo Admin website
xxxx-xxxx-xxxx-xxxx
Submit

Getting Started

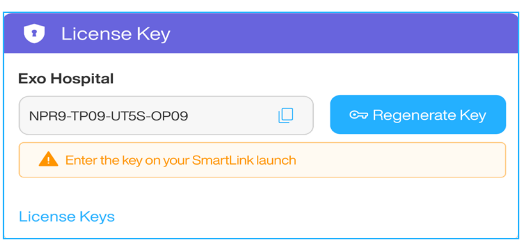
The Getting Started section is your primary entry point to the SmartLink application. It provides a simplified process to activate your license and configure essential settings, ensuring a quick and easy start to using the software.

License Key

To use Smartlink services, a valid license key is required. Without a license key, all Smartlink services are disabled except the Logs and About sections. Once you enter a valid license key, all Smartlink services and features will be enabled, allowing full functionality of the application.

GENERATE A LICENSE KEY FOR SMARTLINK

1. Log in to the Exo Works web application as a **Facility Admin**.
2. Go to the **Admin** tab, then select **Connections**.
3. In the dropdown menu select **SmartLink**.
4. Locate the **License Key** section.
5. Click **Regenerate Key** to generate a new code.



Cautions

- If you are generating a key for the first time, you can ignore the following cautions.
- When regenerating a key:
  - The SmartLink service on the existing windows server will be deactivated.
  - Check for any pending tasks in the SmartLink service before proceeding. Regenerating a key will result in the loss of all pending tasks.
- If you encounter any issues, contact Exo Support for assistance.

ENTER THE KEY IN SMARTLINK

1. Open the SmartLink application.
2. In the **Getting Started** section, paste the copied key into the provided field.
3. In the **License Key** field, enter the newly generated key.
4. Click **Submit**.

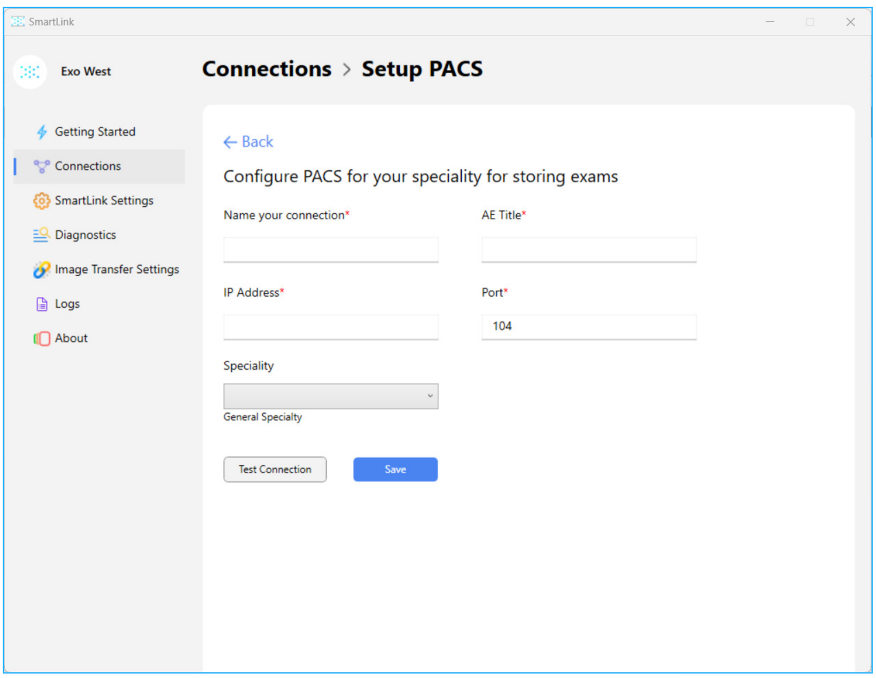
Connections

Adding a PACS Server

Configure the Connection for pushing Completed Exams from Exo Works to a PACS Server

TO ADD A PACS SERVER CONNECTION

1. Navigate to the left panel and select either **Getting Started** or **Connections** and then click **Setup PACS** or **Add PACS**.



2. Complete the following fields:
   - **Name your connection:** Enter a descriptive name to identify the PACS server connection.
   - **AE Title:** Enter the unique identifier assigned to the PACS server within your network.
   - **IP Address:** Specify the network address of the PACS server.
   - **Port:** Enter the port number used by the PACS server for communication.
   - **Specialty:** Select the relevant specialties handled by the PACS server.

3. After entering the PACS server details, click **Test Connection** to verify the accuracy of the information provided. If the connection fails, double-check the entered details and perform the test again.
4. Once the connection is successful, Click **Save** to store the PACS server configuration.

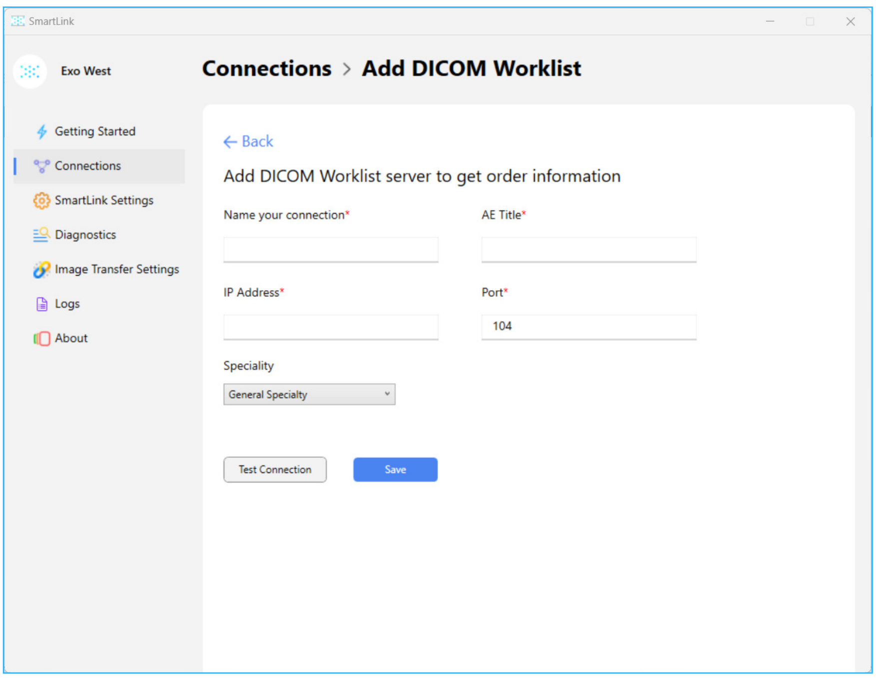
Caution Always test the connection before saving the PACS server configuration. While the SmartLink application allows saving without a successful test, an inactive connection status will be reflected in Exo Works. To ensure smooth data transfer, it is crucial to verify the connection's functionality prior to saving.

Adding a DICOM Worklist server

Configure the Connection to Receive DICOM Data from a Modality Worklist Server

TO ADD THE DICOM WORKLIST SERVER CONNECTION

1. Navigate to the left panel and select either **Getting Started** or **Connections** and then click **Setup DICOM Worklist** or **Add DICOM Worklist**.



2. Complete the following fields:
   - **Name your connection:** Enter a descriptive name to identify the DICOM Worklist server.
   - **AE Title:** Enter the unique identifier assigned to the Worklist server.
   - **IP Address:** Enter the network address of the Worklist server.
   - **Port:** Enter the port number used by the Worklist server for communication.
   - **Specialty:** Select the specific specialty handled by the Worklist server.
3. After entering the Worklist server details, click **Test Connection** to verify the accuracy of the information provided. If the connection fails, double-check the entered details and perform the test again.
4. Once the connection is successful, Click **Save** to store the Worklist server configuration.

Caution Always test the connection before saving the Worklist server configuration. While the SmartLink application allows saving without a successful test, an inactive connection status will be reflected in Exo Works. To ensure smooth data transfer, it is crucial to verify the connection's functionality prior to saving.

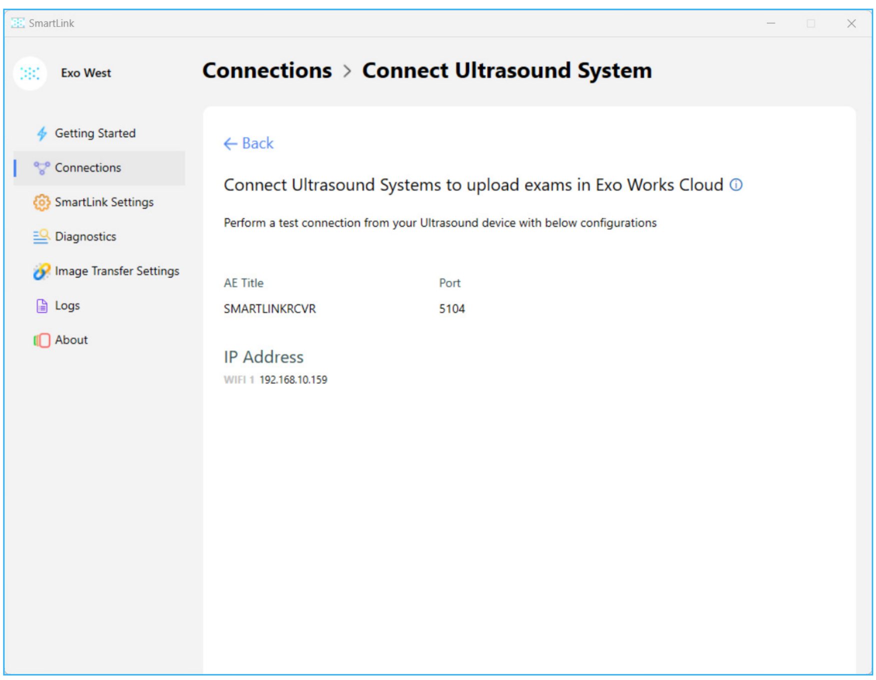
Connecting Ultrasound Systems

TO CONNECT AN ULTRASOUND SYSTEM TO EXO WORKS

Caution

- Always perform a test connection before saving the configuration. Attempting to save without a successful test may result in connection issues and prevent data transfer.
- Ensure that both the SmartLink application and the ultrasound machine are connected to the same network for successful communication.

1. Navigate to the left panel and select either **Getting Started** or **Connections** and then click **Connect Ultrasound Systems**.



2. Find the DICOM setup screen on your ultrasound machine. Most often, this is found in the same general area as your Network configuration screen. If you can't find it, refer to your ultrasound machine user manual.
   a. Complete the following fields on the ultrasound machine's DICOM setup screen:
   - **Name:** Enter a name for the ultrasound system connection.
   - **AE Title:** Enter the AE Title displayed on the SmartLink application.
   - **IP Address:** Enter the IP address displayed on the SmartLink application.
   - **Port:** Enter the port number displayed on the SmartLink application.

3. Click the **Verify** or **Test** on the ultrasound machine to check the connection. If the connection fails, double-check the entered details and perform the test again.

4. If the test is successful, **save** the settings on the ultrasound machine.

> **Note** After successfully adding a new ultrasound device to Smartlink, it will initially be assigned to the default specialty. To modify the specialty, please see Managing connections. Additionally, the device will be assigned the default Dicom tag **Performing Physician's Name (0008,1050),** to change this tag, please see TO assign the specific Dicom Tag.

Managing connections

TO MODIFY A PACS SERVER CONNECTION

1. Navigate to the left panel and select **Connections**.
2. Select the desired PACS server from the list.
3. Click the ⋯ button select **Edit**.
4. Modify necessary fields such as Name of the connection, AE title, IP address, and select the desired specialty(s).
5. Click **Test Connection** to verify the accuracy of the information provided. If the connection fails, double-check the entered details and perform the test again.
6. Click **Save** to apply the modifications.

TO MODIFY A WORKLIST SERVER CONNECTION

1. Navigate to the left panel and select **Connections**.
2. Select the desired Worklist server from the list.
3. Click the ⋯ button select **Edit**.
4. Modify necessary fields such as Name of the connection, AE title, IP address, and select the desired specialty.
5. Click **Test Connection** to verify the accuracy of the information provided. If the connection fails, double-check the entered details and perform the test again.
6. Click **Save** to apply the modifications.

TO MODIFY A ULTRASOUND DEVICE CONNECTION

1. Navigate to the left panel and select **Connections**.
2. Select the desired Ultrasound from the list.
3. Click the ⋯ button select **Edit**.
4. Modify necessary fields such as Name of the connection, select the desired specialty and the DICOM tag (see "Routing 3rd Party Ultrasound Exams to the Performer's Drafts Folder" on page 43) based on third party ultrasound specification.
5. Click **Save** to apply the modifications.

Routing 3rd Party Ultrasound Exams to the Performer's Drafts Folder

To automatically route 3rd party ultrasound exams to the correct performer's Drafts folder in Exo Works:

- Set up your ultrasound device to transmit exams to SmartLink using a specific DICOM tag for identification (see TO assign the specific Dicom Tag).
- Exo Works will automatically parse the DICOM tag and route the exam to the appropriate performer's Drafts folder.

TO ASSIGN THE SPECIFIC DICOM TAG

1. Navigate to the left panel and select **Connections**.
2. Select the desired Ultrasound from the list.
3. Click the ··· button select **Edit** to modify the connection settings.
4. Locate **Performing physician mapped** from and click down arrow to expand the list.
5. From the drop down list, select the DICOM tag based on third party ultrasound specification. The following options are available:
    - **Performing Physician's Name (0008,1050):** Assigns exams to the physician in Exo Works based on the name of the performing physician.
    - **Referring Physician Name (0008,0090):** Assigns exams to the physician in Exo Works based on the referring physician's name.
    - **Operator Name (0008,1070):** Assigns exams to the physician in Exo Works based on the operator's name.
    - **Name of the Physician Reading Study (0008,1060):** Assigns exams to the physician in Exo Works based on the name of the reading physician.
    - **Persons Telecom Information (0040,1104):** Assigns exams to the physician in Exo Works based on the contact information (phone number or email) of the physician.
    - **Map to Unassigned Folder (None):** Assigns the exam to the unassigned folder in Exo works.
6. Click **Save** to apply the modifications.

Caution If there are any discrepancies or typos in the information entered in the third party ultrasound application that do not match the corresponding user information in Exo Works, the exam will be automatically moved to the unassigned folder. To ensure accurate exam assignment, it is crucial to maintain data integrity and consistency between the DICOM tags and Exo Works user records.

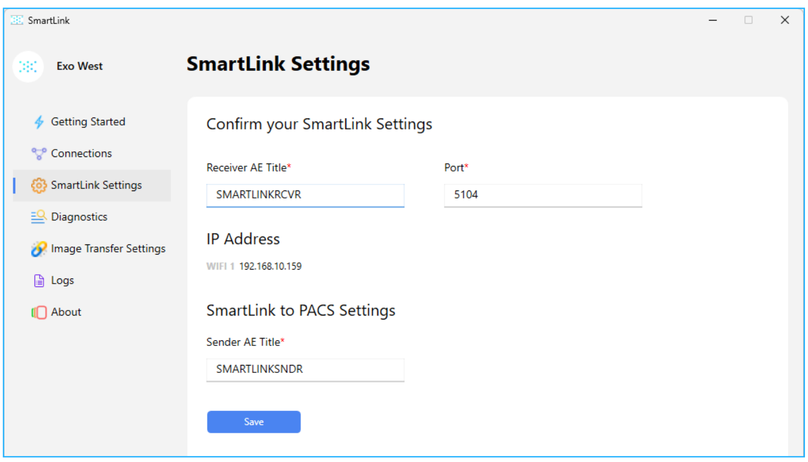
TO DELETE ANY EXISTING CONNECTION

1. Navigate to the left panel and select **Connections**.
2. Select the desired connection from the list.
3. Click the ··· button select **Delete**.

Caution Deleting a connection is permanent and cannot be undone. Exercise caution when deleting connections.

SmartLink Settings

The SmartLink Settings section serves as the main control point for configuring the core parameters necessary to the application's operation. SmartLink Settings is crucial for defining key parameters to ensure smooth communication and data exchange within the DICOM environment.



TO CONFIGURE SMARTLINK SETTINGS

1. Navigate to the left panel and select on either **Getting Started** and then **Setup SmartLink**, or directly select **SmartLink Settings**.
2. Complete the following fields:
   - **Receiver AE Title:** A unique identifier assigned to the SmartLink application for receiving DICOM data within the network.. A default title of "SMARTLINKRCVR" is assigned. Users can assign a custom title if needed.
   - **IP Address:** Displays the system's network addresses. This field is read-only.
   - **Port:** The communication port for the SmartLink application. A default port of "5104" is assigned. Users can specify a different free port if necessary.
   - **Sender AE Title:** A unique identifier assigned to the SmartLink application for sending DICOM data to the PACS server. A default title of "SMARTLINKSNDR" is assigned. Users can assign a custom title if needed.
3. Once you've entered the necessary information, click **Save** to apply the changes.

Diagnostics

The Diagnostics section provides tools for monitoring the health and performance of the SmartLink application and its connections to external systems. Users can track the status of Exo Works cloud and PACS server connections, identify potential issues, and perform troubleshooting steps.

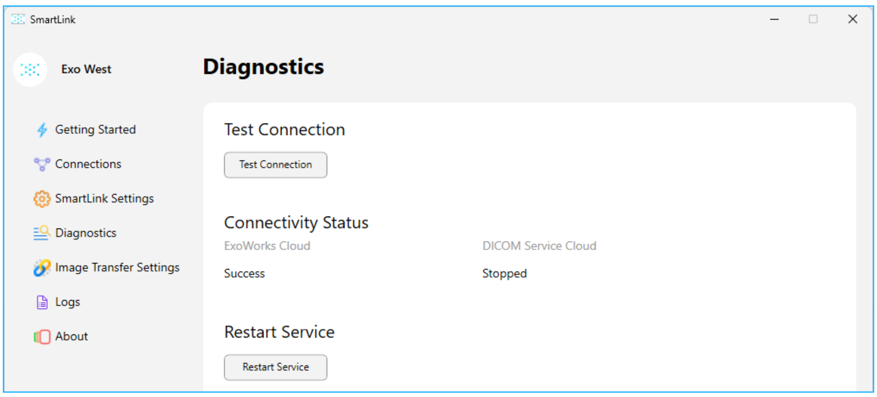


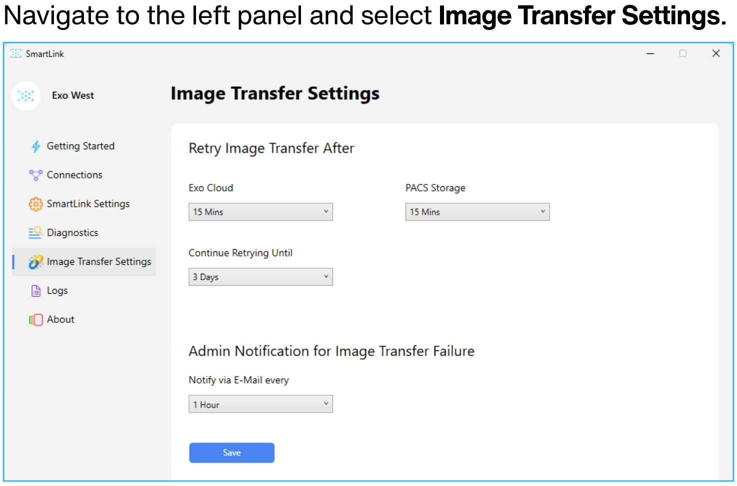
Image Transfer Settings

The Image Transfer Settings section governs the parameters related to the successful transmission of images to Exo cloud and PACS storage. By carefully configuring these settings, users can optimize image transfer reliability and proactively manage potential issues. Key functionalities within this section include:

- **Retry Interval Settings:** Users can configure the frequency at which failed image transfers are re-attempted. This setting allows for flexibility in determining the optimal retry interval based on network conditions and system load.
- **Notification Configuration and Frequency:** The system can be configured to send notifications to specific recipients in case of persistent image transfer failures. These notifications can be directed to facility admin, and Exo internal team to ensure timely intervention and resolution of issues. The frequency of notifications can be set to a desired interval, ranging from every hour to every 24 hours, allowing for customized alert schedules.

TO CONFIGURE IMAGE TRANSFER SETTINGS

1. Navigate to the left panel and select **Image Transfer Settings**.



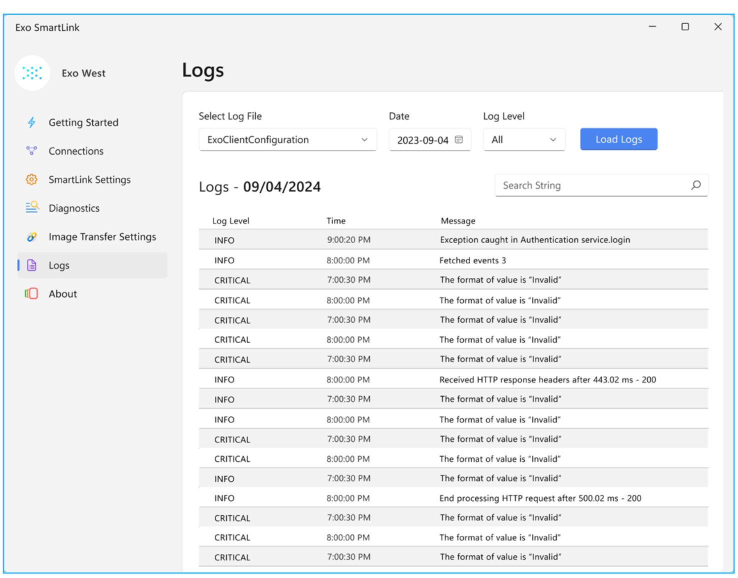
2. Complete the following fields:
   - **Exo Cloud:** Set the desired retry interval for image transfer to the Exo Cloud. Options include every 5, 15, or 30 minutes..
   - **PACS Server:** Specify the retry interval for image transfer to the PACS server. Options include every 5, 15, or 30 minutes.
   - **Continue Retry Until:** Determine the maximum number of days for retry attempts. Options include 1, 2, 3, or 4 days.
   - **Notify via email every:** Set the frequency for sending email notifications to the facility admin in case of continuous retry failures. Options include every 1 to 24 hours.

3. Click **Save** to apply changes.

Logs

The Logs section serves as a comprehensive repository for system activities, precisely documenting actions performed by both ExoClientConfiguration and SmartLink service. The log entries are categorized into different levels of severity:

- **Info:** Provides detailed information about system operations and events.
- **Error:** Records instances of unexpected conditions that may have disrupted normal system functioning.
- **Fatal:** Indicates critical errors that have caused the system to fail or terminate.
- **All:** Includes a comprehensive view of all log entries, encompassing informational, error, and fatal messages.



TO FILTER LOGS

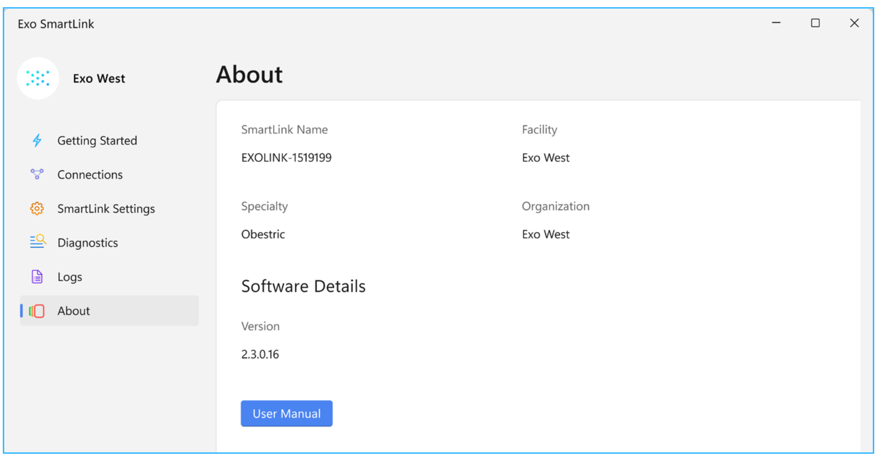
❖ Select Log File type, date and log level, then click **Load Logs**.

TO SEARCH LOGS

❖ Enter keywords in the **Search box** to find specific logs.

About

The About section provides essential details to help users manage and understand their software. It includes information about the facility and specialty that SmartLink supports, along with details about the organization utilizing the application. This section also shows the current version of the software, which is important for troubleshooting and ensuring compatibility. Additionally, users can check for available software updates here, keeping their application up-to-date with the latest features and improvements. For further assistance, users can access the user manual by clicking the **User Manual** button.



Connections

The Connections section displays a list of all current connections and their statuses.

- **Active:** Connections that are currently operational and actively transmitting data. These connections are fully functional and engaged with the system.
- **Inactive:** Connections that are not currently active. These connections are not transmitting data or engaging with the system.
- **Blocked:** Connections that are blocked and unable to communicate with the system. This status typically indicates that the connection is being restricted or has encountered issues preventing its activity.

Ensure you have set up SmartLink to establish connections. For detailed instructions to set up and manage connections please refer to https://support.exo.inc/hc/en-us/article_attachments/28685780241947.

Device Management

Device Management offers a comprehensive view of all Iris devices within your organization. This feature is designed to provide valuable insights into the status and usage of each device.

TO ACCESS DEVICE INFORMATION

1. Navigate to the **Admin** tab, Select **Device Management**.
2. Click **Devices.**
3. For each device, the following information is displayed:
   - **Serial number:** A unique identifier for the device.
   - **Order number:** The reference number associated with the device purchase.
   - **Last Usage By:** The user who last used the device.
   - **Last Used Date:** The date and time of the device's last usage.

License and Feature Management

TO VIEW LICENSES

1. Navigate to the **Admin** tab, Select **License Management**.
2. Click **Licenses.**
3. For each device, the following information is displayed:
   - **License Type:** The specific type of license
   - **Catalog #:** A unique identifier for the license.
   - **Start Date:** Date when the license or subscription started.
   - **End Date:** Date when the license or subscription will expire.
   - **Order ID:** Unique identifiers for each subscription.
   - **Quantity:** Number of licenses available.
   - **Status:** Current status of the licenses (active or inactive).
4. If additional licenses are needed, please reach out to the support team for assistance.

User Authentication

Facility Admin can configure the Single Sign-On (SSO) authentication method to enable users to securely authenticate on both the mobile and web versions of Exo Works.

General Settings

TO CONFIGURE GENERAL SETTINGS

1. Navigate to the **Admin** tab, then select **User Authentication**.
2. Click **Configure Single Sign-On (SSO)**.
3. Go to the General Settings tab.
4. Complete the following fields:
    - **SAML Provider Settings:** Provide the following information to your SAML Identity Provider
        - **Entity ID:** This field is automatically populated
        - **SSO URL:** This field is automatically populated
    - **SAML IdP Settings:**
        - **Metadata URL:** Toggle this option to configure SAML using the Metadata URL.
        - **Sign-In URL**
        - **Sign Certificate**

Advanced Settings

TO CONFIGURE ADVANCED SETTINGS

1. Navigate to the **Admin** tab, then select **User Authentication**.
2. Click **Configure Single Sign-On (SSO)**.
3. Go to the General Settings tab.
4. Complete the following fields:
    - **Disable Sign-Out:** Toggle this option to enable or disable the advanced settings.
    - Make selections for the following fields:
        - **Sign Request Algorithm**
        - **Sign Request Algorithm Digest**
        - **Protocol Binding**
    - **Mappings:**
        - **User ID Attribute**
        - **SAML Attribute for User Name**
        - **SAML Attribute for User Email**

Managing Exams - Web

4

Managing Exams - Web

Chapter 4

Note Accessing the Exams on the Exo Works web application requires a clinical role (see Clinical Roles on page 12).

Exo Works Home screen

After signing in, you will be directed to the home screen. The left panel of the screen displays the following:

- **Specialty:** Indicates the currently selected specialty.
- **Shared Tab:** Displays content shared with you by other users.
- **Insights Tab:** Provides valuable insights and analytics.
- **Quality Tab:** Holds all completed exams that require QA review.
- **Folders:** These folders organize exam locations and serve various purposes.

Switching Specialties

Users who belong to multiple specialties can easily switch between them.

TO SWITCH SPECIALTIES

1. Click the button next to the current specialty on the left side of the home screen.
2. Select the desired **specialty** from the list.

Once you select a new specialty, the home screen will automatically update to reflect your choice.

Folders

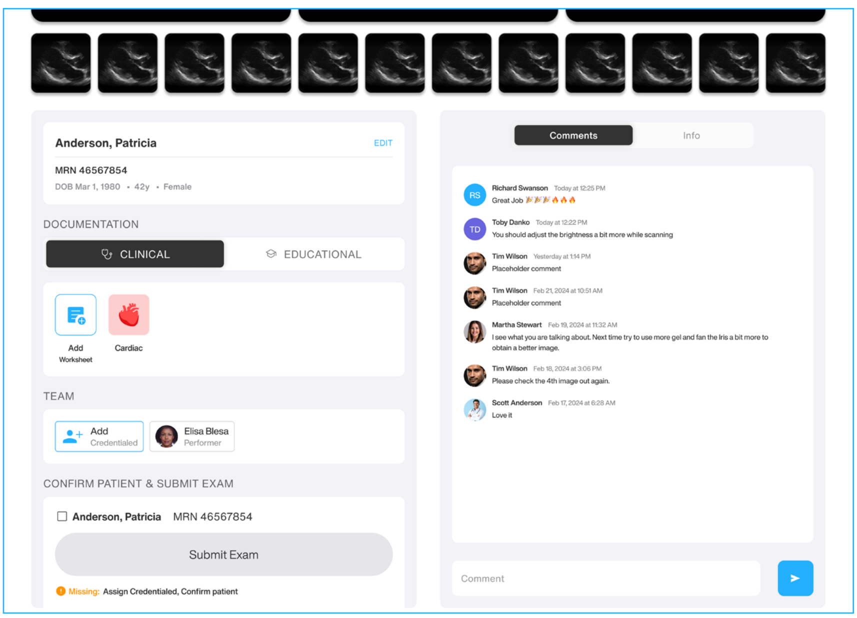
- **All Exams:** Contains all exams within the specialty accessible by the specialty admin.
- **Drafts:** Stores exams that are in progress but not yet completed.
- **Sign Off:** Stores exams awaiting review and sign-off by credentialed users.
- **Feedback:** Stores exams with feedback from the QA team.
- **Unassigned:** Stores exams that have not been assigned to specific users.
- **Favorites:** Stores exams marked as favorites for quick access.
- **Completed:** Stores exams that have been successfully completed.
- **Trash:** Stores deleted exams temporarily before permanent removal.
- **Outbox:** Temporarily holds exams that are being processed for transfer to PACS or Exo Works Archive.

Exam and Image management

Selecting and Viewing an Exam

TO SELECT AND VIEW AN EXAM

1. Select a folder to view the exams it contains.
2. A list of exams with their details will appear.
3. Click on the exam you want to view.
4. Once you open an exam the interface is organized as follows:



- **Top of the Screen:** Displays the images or clips related to the exam.
- **Left Panel:**
  - **Patient Data:** Displays patient information and allows you to edit it.
  - **Documentation:** Toggle between clinical and educational worksheets, add new worksheets, and view associated worksheets.
  - **Team:** Displays the team assigned to the exam and allows you to add performers.
  - **Confirm Patient and Submit Exam:** Enables you to submit the exam.
  - **Destination:** Specifies where the exam will be stored (Exo Works Archive, or Exo Works Archive + PACS).
- **Right Panel:**
  - **Comments:** Shows comments made by performers.
  - **Info:** Displays the exam status and exam information.

Adding a Patient to an Exam

TO ADD PATIENTS

1. Select the **Add/Edit** button within the patient information field.

Note	Iris exams will always have a patient associated once sent to Exo Works cloud and therefore, will only have the update/edit capability. Non-Iris ultrasound exams may require adding of patient.

2. This prompts the ability to manually edit the previously entered information.
3. There are three ways you can change patient information
   - Manually enter/edit patient information by filling out the necessary fields.
   - If you are connected to a DICOM Modality Worklist, you can select the Patient Worklist icon to view existing patients. After selecting the Patient Worklist icon, a list of existing patients will appear. Search by MRN or patient name, then select the desired patient. The patient details will be pulled into the patient information section within the exam.
4. Click **Save Changes**.

Exam Documentation

PRE-DEFINED WORKSHEETS

Exo Works has twenty-two pre-defined worksheets available for documentation.

- Abdomen
- Aorta
- Arterial Access
- Biliary
- Bladder
- Breast
- Cardiac
- Central Venous Line
- Deep Vein
- eFAST/FAST
- GYN
- Lung
- MSK
- Nerve Block
- OB1
- OB2/3
- Ocular

- Paracentesis
- Peripheral Access
- Renal
- Testicular
- Thoracentesis

Reviewing Images Within an Exam

TO REVIEW IMAGES

1. Navigate to any folder and search for the desired exam.
2. Click on the exam to open it.
3. The images or clips will be displayed at the top.
4. Click on a specific image or clip to view it in more detail.
5. If applicable, measurements and selected exam types will be shown below the image.

Searching, Sorting, and Filtering Exams

TO SEARCH AN EXAM

1. Click on the **Search** icon at the top of the home screen.
2. Type in your search term, which can be:
   - Exam Type
   - Patient's Medical Record Number (MRN)
   - Patient's Name
   - Doctor's Name

TO SORT AN EXAM

1. Click button on Right panel above list of exams.
2. Choose from the available options:
   - **Newest First:** To view the most recent exams first.
   - **Oldest First:** To view the oldest exams first.

TO FILTER AN EXAM

1. Click button on Right panel above list of exams.
2. Choose the filters from the available options:
   - Last 24 Hours
   - Last 7 Days
   - Last 30 Days
   - Custom Date Range

Assigning an Unassigned Exam to Yourself

Exams from ultrasounds that are not mapped with any **DICOM tags** can be found under the Unassigned folder

TO ASSIGN AN UNASSIGNED EXAM TO YOURSELF

1. Open the **Unassigned** folder to view all exams that haven't been assigned.
2. If you can't find the desired exam, use the search bar at the top of the **Unassigned** section.
3. Choose the exam you want to assign.
4. The selected exam will open, showing images at the top and patient information below.
5. In the **Team** section at the bottom, click **Assign Performer**.
6. Click **Assign myself as Performer** to confirm
7. Your name will appear under the **Team** section.
8. The exam will be moved from **Unassigned** to the **Drafts** folder, as it now has a performer assigned.

Completing an Exam

Documenting an Exam

TO DOCUMENT AN EXAM

1. Go to **Drafts** folder to select an exam for documentation.
2. Update patient information as needed, see To Add patients section.
3. Select clinical or educational.
   - A clinical worksheet is a structured document used in healthcare to record patient data, examination findings, and treatment plans. If clinical, the exam could be sent to a PACS or VNA and/or the Exo Works Archive for storage.
   - An educational exam cannot be sent to PACS. For an educational exam, if the exam destination is set to PACS and Exo Works Archive, the exam will only be archived to Exo Works, and not sent to PACS.
4. Click **Add Worksheet** to select desired worksheet(s). Minimum of one worksheet is required.
5. Select at least one indication.
6. Select at least one view. When you toggle the **All Views** it auto-populates all the views.
7. Click **>** arrow to navigate to the next section.
8. Complete the Findings & Interpretation section.
   - When you toggle the **No remarkable findings** it auto-populates the associated normal findings.
9. Click **>** arrow again to review the final report.
10. Select the **Mark as Complete** button to complete the worksheet.

Adding additional Performers to Exams

TO ADD ADDITIONAL PERFORMERS

1. Open the **Drafts** folder to view all exams.
2. If you can't find the desired exam, use the search bar at the top of the **Drafts** section.
3. Choose the exam you want to add additional Performers.
4. The selected exam will open, showing images at the top and patient information below.
5. In the **Team** section at the bottom, click on the **Add Additional Performers**.
6. Select up to five performers from the list.
7. Click **Add** to confirm your selection.
8. The newly added performers names will appear under the **Team** section.
9. Once the exam is completed, it will be available in the **Completed** folder of both the main performer and the additional performers.
10. After QA review, the exam will be available in the **Feedback** folder of all performers. All performers will receive credit for the exam.

Note	The performer and specialty admin can assign additional performers.

Assigning an Exam to a Credentialed User

To complete the exam process, a non-credentialed user must assign the exam to a credentialed user for sign off.

TO ASSIGN AN EXAM TO A CREDENTIALED USER

1. After the exam is performed, ensure the worksheet is filled out.
2. In the **Team** section at the bottom, click **Add Credentialed.**
3. A list of users credentialed for the chosen worksheet will appear. Choose the **Credentialed** user to whom the exam should be assigned.
4. Click **Add** to confirm your selection.
5. The exam will appear in the credentialed user's **Sign Off** folder for review and sign-off.

Note	The credentialed user is responsible for reviewing and signing off on the assigned exam.

Exam Destination

You can review where the exam will be archived under the Exam Destination section. All exams will be synced to Exo Works. If a PACS is configured by your admin, exams will also be sent to the PACS destination.

Confirm Patient and Submit Exam

1. Review and confirm the patient by checking the box.
2. Click **Submit**.
3. The signed exam will then move to the **Completed** folder of the non-credentialed user and **Sign Off** folder of the credentialed user.

Sign Off as a Credentialed Reviewer

Credentialed users will find exams awaiting review and sign-off in the **Sign Off** folder on the home screen.

Ensure all clips and images are present in the exam before Sign-off.

TO SIGN OFF AS A CREDENTIALED REVIEWER

1. Open the exam to review patient information and documentation.
2. Verify all information and documentation.
3. If approved, Click **Sign off**.
   - If not approved, edit the performer's work, then proceed with signing.
4. The signed exam will move to the Completed folder of the credentialed user.

Quality Assurance (QA)

Selecting an Exam for QA Review

TO SELECT AN EXAM FOR QA REVIEW

1. Ensure you have the **QA Reviewer** role, which grants access to the **Quality** folder containing exams reviewed by performing and credentialed users.
2. Click **Quality** tab to view exams awaiting QA review. Exams are categorized into:
   - **Pending:** QA review has not yet started.
   - **In Progress:** QA review is underway but not completed.
   - **Reviewed:** Exams that are fully reviewed and submitted by a QA user.
3. Select an exam by browsing through the folders or using the search and sorting features in the search bar (see Searching, Sorting, and Filtering Exams).
4. Click on the exam to assign yourself as the **QA Reviewer**. Your name will appear in the Team section of the exam.
5. Initiate the QA review by clicking the **Rate** button at the bottom of the screen.

Performing a QA Review

TO PERFORM A QA REVIEW

1. Select an exam as described in the [Quality Assurance (QA)] section.
2. Click the **Rate** button to proceed.
3. View the worksheets of the performing and credentialed users. If there are multiple worksheets, they will be displayed at the bottom with their names and icons.
4. Click on worksheet icons to switch between them for review.
5. Complete the QA reviewer's worksheet by:
    - Agreeing with the final report
    - Scanning questions
    - Assessing image quality
    - Providing feedback
    - Adding flags for follow-up requirements
6. Your responses will determine if the performing and credentialed users receive credit.
7. Submit the review by clicking the **Submit** button. The exam will be marked as QA submitted and moved to the completed folder of the QA reviewer and the feedback folder of the performing and credentialed users.

Receiving a QA Feedback

1. Both non-credentialed and credentialed users will receive QA feedback.
2. Reviewed exams will be placed in the **Feedback** folder of both non-credentialed and credentialed users.
3. Open the **Feedback** folder and select the desired exam. The QA review will be displayed beneath the Team section.
4. Click the **Feedback** button or select the worksheet icon to view detailed feedback.
5. If the exam has been flagged, you can unflag it once the issue has been addressed with the QA reviewer.
6. After reviewing the feedback, the exam will remain in the **Feedback** folder of the respective user.

All Exams Folder Access for Specialty Admins

Specialty Admins have exclusive access to the All Exams folder, allowing them to:

- **Reassign Exams to Themselves or Credentialed Users:**
  - Specialty Admins can reassign exams to themselves or other credentialed users.
  - Once an exam has been submitted by the performer, the Specialty Admin can reassign a new credentialed user.
- **Reassign Themselves as QA Reviewers:**
  - Specialty Admins can assign themselves as QA reviewers, provided they have not performed the exam themselves.
  - If the exam has already been assigned a QA reviewer and the QA process is not yet complete, the Specialty Admin can take on this role.

Note	It is not permitted to unassign a user from an exam.

TO REASSIGN YOURSELF OR A CREDENTIALED USER TO AN EXAM

1. Open **All Exams** Folder.
2. Select and open the exam you wish to reassign.
3. Locate the **Team** section and click on the current performer's name.
4. Search and select a credentialed user (yourself or another) from the list.
5. The reassigned user's name will now appear in the **Team** section.
6. The exam will automatically move to the Drafts folder of the reassigned credentialed user.

TO REASSIGN YOURSELF AS A QA REVIEWER

1. Click on the **Quality** tab on the home screen
2. Toggle to **In Progress.**
3. Open the exam you wish to reassign.
4. Click on the current QA reviewer's name in the **Team** section.
5. Click **Assign Myself as QA Reviewer.**
6. Your name will now appear in the Team section as the new QA reviewer.

Delete an Image or Exam

TO DELETE AN IMAGE

1. From Exo Works, images or clips can only be deleted in the **Drafts** Folder.
2. Access the **Drafts** Folder.
3. Click on the image or clip you wish to remove.
4. In the right panel, click **Select** to begin choosing the items to delete.
5. Select the image(s) or clip(s) for deletion. You can choose multiple items. If you select all, the entire exam will be deleted.
6. Click to prompt a confirmation pop-up to confirm the deletion.
7. Once confirmed, the selected image(s) or clip(s) will be permanently removed from the exam.

TO DELETE AN EXAM

1. From Exo Works, Exams can only be deleted in the **Drafts** Folder.
2. Access the **Drafts** Folder.
3. Click the button for the exam to access and select **Delete**.
4. Deleting the exam will move it to the **Trash** folder.

Note	In the **Trash** folder, select the exam and choose to permanently delete it. Alternatively, click on the three-dot icon for the same option to permanently delete. Exams in the **Trash** folder can be recovered within 30 days. After this period, they will be permanently deleted.

Sharing an Image or Exam

TO SHARE AN IMAGE

1. Select the exam to share.
2. Select one or all image(s) or clips(s).
3. Click on the share icon .
4. A share window will appear, Click **Continue**. You will see the file size and number of files for export.
5. Select the file type to export the image in DICOM, JPG/MP4 format, or both.
6. Select the **Export** button to save to your local Downloads folder on your PC.

TO SHARE AN EXAM

1. Open the desired folder.
2. Click the ⋮ button for the exam to access and select **Share**.
3. A sharing window will open, giving you the below options
   - **Share with in my organization:** If you choose this option, a list of team members will appear. Select one or more users, then click **Share Exam**.
   - **Share public link:** Provides a public link, Copy and paste the public link to share the exam externally. The shared public link will expire after 30 days.

TO SHARE WITHIN MY ORGANIZATION

1. You can share the exam with a member of your organization using either of the following:
   - Clicking the ⋮ icon in the exam card menu and select **Share**.
   - Open the exam and click the ··· icon on the top right and select **Share**.
2. Tapping **Share** will open up a list of all clinical users within your organization. Select the desired team members to share the exam with.
3. Once shared, the exam will be moved into the **shared** folder of the user(s) that you have shared the exam with. Exams within the Shared folder are in a read-only format.

TO SHARE PUBLIC LINK

1. Select the exam to share.
2. Click the ⋮ icon for the exam to access and select **Share Exam**.
3. A share window will appear. Select the Share Public Link to copy the secure URL.
4. In web, paste the public link in applications installed on your PC to share externally.
5. The shared public link will expire after 30 days.

Favorite and Unfavorite an Exam

TO FAVORITE AN EXAM

1. Access the exam you want to favorite.
2. There are two ways to Favorite an exam:
   - Click the exam menu option on the exam to access and select **Favorite**.
   - Click on ⋮ icon for the exam to access and select **Favorite**.
3. The exam will be placed in your **Favorites** folder.

TO UNFAVORITE AN EXAM:

1. Access the exam you want to unfavorite.
2. There are two ways to unfavorite an exam:
   - Click the exam menu option on the exam to access and select **Unfavorite**.
   - Click on ⋮ icon for the exam to access and select **Unfavorite**.
3. The exam will be removed from your **Favorites** folder.

Commenting on an Exam

Any user with access can add a comment to an exam.

TO COMMENT

1. Open the exam you want to comment on.
2. Type your comment in the **Add Comment** field at the bottom.
3. Click to post the comment.
4. Your comment will appear beneath any previous comments.

TO DELETE A COMMENT

1. Select your comment.
2. Click to delete the comment.

Note	All comments will be retained for 30 days. After that, they will be automatically deleted from the exam's comment section.

Managing Exams - Mobile

5

Managing Exams - Mobile

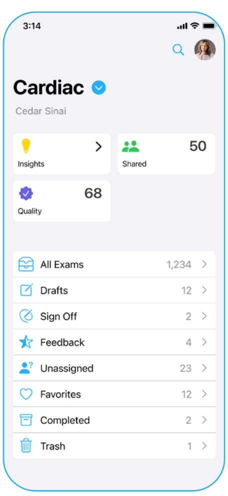
Chapter 5

Exo Iris App Home screen

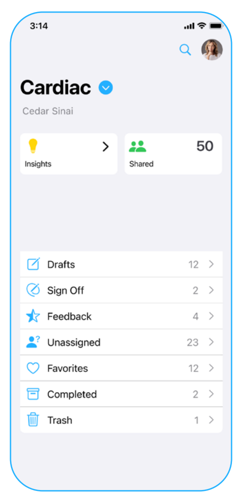
Note Accessing the Exo Iris mobile app requires a clinical role (see Clinical Roles on page 12).

1. Open the **Exo Iris** app on your mobile device.
2. After logging in, you will be directed to the Home Screen, which displays features and options specific to your user role.

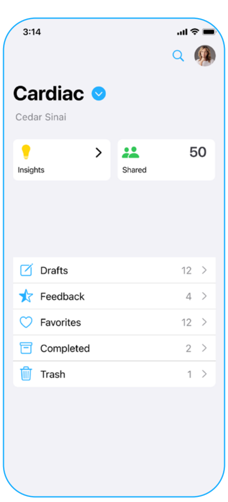
For a QA Reviewer / Specialty Admin



For a Credentialed user



For a Non-Credentialed user



3. The screen displays the following:

- **Specialty:** Indicates the currently selected specialty.
- **Shared Tab:** Displays content shared with you by other users.
- **Insights Tab:** Provides valuable insights and analytics.
- **Quality Tab:** Holds all completed exams that are pending QA, in progress, and QA complete.
- **Folders:** These folders organize exam locations and serve various purposes.

Switching Specialties

Users who belong to multiple specialties can easily switch between them.

TO SWITCH SPECIALTIES

1. Tap on button next to the current specialty.
2. Select the desired **specialty** from the list.

Once you select a new specialty, the home screen will automatically update to reflect your choice.

Changing Preferred Specialty

TO CHANGE PREFERRED SPECIALTY

1. Tap on button next to the current specialty.
2. Tap **Change Preferred Specialty**.
3. Select the specialty you like to make your preferred choice.
4. A confirmation message will appear to ensure you're satisfied with your selection. Once confirmed, you'll be redirected to your updated specialty page.

Folders

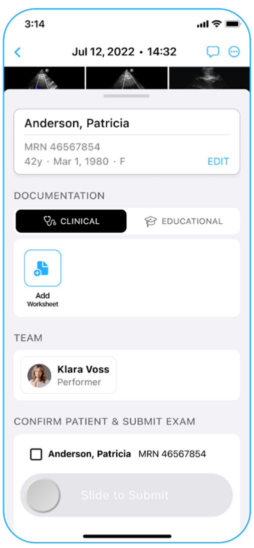
- **All Exams:** Contains all exams within the specialty accessible by the specialty admin.
- **Drafts:** Stores exams that are in progress but not yet completed.
- **Sign Off:** Stores exams awaiting review and sign-off by credentialed users.
- **Feedback:** Stores exams with feedback from the QA team.
- **Unassigned:** Stores exams that have not been assigned to specific users.
- **Favorites:** Stores exams marked as favorites for quick access.
- **Completed:** Stores exams that have been successfully completed.
- **Trash:** Stores deleted exams temporarily before permanent removal.
- **Outbox:** Temporarily holds exams that are being processed for transfer to PACS or Exo Works Archive.

Exam and Image management

Selecting and Viewing an Exam

TO SELECT AND VIEW AN EXAM

1. Tap on a folder to view the exams it contains.
2. A list of exams with their details will appear.
3. Tap on the exam you want to view.
4. Once you open an exam the interface is organized as follows:



- **Media Section:** At the top, displays the images or clips related to the exam.
- **Patient Information:** Directly below the media, patient details will be displayed.

Additional Details (Accessible by Swiping Up):

- **Documentation Type:** Toggle between clinical and educational exams.
- **Worksheets:** Access pre-defined worksheets for documentation.
- **Team:** View the team members involved in the exam.
- **Exam Destination:** Choose where to store the exam (PACS/VNA, Exo Works Archive, or both).
- **Patient Information Confirmation:** Verify the accuracy of patient details.
- **Sign Off:** Submit the final exam after review.

Adding a Patient to an Exam

TO ADD PATIENTS

1. Select the **Add/Edit** button within the patient information field.

> **Note** Iris exams will always have a patient associated once sent to Exo Works cloud and therefore, will only have the update/edit capability. Non-Iris ultrasound exams may require adding of patient.

2. This prompts the ability to manually edit the previously entered information.
3. There are three ways you can change patient information
   - Manually enter/edit patient information by filling out the necessary fields.
   - If you are connected to a DICOM Modality Worklist, you can select the Patient Worklist icon to view existing patients. After selecting the Patient Worklist icon, a list of existing patients will appear. Search by MRN or patient name, then select the desired patient. The patient details will be pulled into the patient information section within the exam.
   - Alternatively, the barcode scanner can be used to populate patient MRN
4. Click **Save Changes**.

Exam Documentation

PRE-DEFINED WORKSHEETS

Exo Works has twenty-two pre-defined worksheets available for documentation.

- Abdomen
- Aorta
- Arterial Access
- Biliary
- Bladder
- Breast
- Cardiac
- Central Venous Line
- Deep Vein
- eFAST/FAST
- GYN
- Lung
- MSK
- Nerve Block
- OB1
- OB2/3

- Ocular
- Paracentesis
- Peripheral Access
- Renal
- Testicular
- Thoracentesis

Reviewing Images Within an Exam

TO REVIEW IMAGES

1. Tap on any folder and search for the desired exam.
2. Tap on the exam to open it.
3. The images or clips will be displayed at the top.
4. Tap on a specific image or clip to view it in more detail.
5. If applicable, measurements and selected exam types will be shown below the image.

Searching, Sorting, and Filtering Exams

TO SEARCH AN EXAM

1. Tap on the 🔍 icon at the top of the home screen.
2. Type in your search term, which can be:
    - Exam Type
    - Patient's Medical Record Number (MRN)
    - Patient's Name
    - Doctor's Name

TO SORT AN EXAM

1. Tap on **SORT BY** above list of exams.
2. Choose from the available options:
    - **Newest First:** To view the most recent exams first.
    - **Oldest First:** To view the oldest exams first.

TO FILTER AN EXAM

1. Tap on **FILTER BY** above list of exams.
2. Choose the filters from the available options:
    - Last 24 Hours
    - Last 7 Days
    - Last 30 Days
    - Custom Date Range

Assigning an Unassigned Exam to Yourself

Exams from ultrasounds that are not mapped with any **DICOM tags** can be found under the Unassigned folder

TO ASSIGN AN UNASSIGNED EXAM TO YOURSELF

1. Tap on **Unassigned** folder to view all exams that haven't been assigned.
2. If you can't find the desired exam, use the search bar at the top of the **Unassigned** section.
3. Tap on the exam you want to assign.
4. The selected exam will open, showing images at the top and patient information below.
5. Scroll down to **Team** section at the bottom, Tap **Assign Performer**.
6. Tap **Assign myself as Performer** to confirm
7. Your name will appear under the **Team** section.
8. The exam will be moved from **Unassigned** to the **Drafts** folder, as it now has a performer assigned.

Completing an Exam

Documenting an Exam

TO DOCUMENT AN EXAM

1. Go to **Drafts** folder to select an exam for documentation.
2. Update patient information as needed, see To Add patients section.
3. Select clinical or educational.
   - A clinical worksheet is a structured document used in healthcare to record patient data, examination findings, and treatment plans. If clinical, the exam could be sent to a PACS or VNA and/or the Exo Works Archive for storage.
   - An educational exam cannot be sent to PACS. For an educational exam, if the exam destination is set to PACS and Exo Works Archive, the exam will only be archived to Exo Works, and not sent to PACS.
4. Tap **Add Worksheet** to select desired worksheet(s). Minimum of one worksheet is required.
5. Select at least one indication.
6. Select at least one view. When you toggle the **All Views** it auto-populates all the views.
7. Swipe left to move to the next page.
8. Complete the Findings & Interpretation section.
   - When you toggle the **No remarkable findings** it auto-populates the associated normal findings.
9. Swipe left to review the final report.
   - Swipe right to make edits if needed.
10. Select the **Mark as Complete** button to complete the worksheet

Adding additional Performers to Exams

TO ADD ADDITIONAL PERFORMERS

1. Open the **Drafts** folder to view all exams.
2. If you can't find the desired exam, use the search bar at the top of the **Drafts** section.
3. Tap on the exam you want to add additional Performers.
4. The selected exam will open, showing images at the top and patient information below.
5. Scroll down to **Team** section at the bottom, tap on the **Add Additional Performers**.
6. Select up to five performers from the list.
7. Tap **Add** to confirm your selection.
8. The newly added performers names will appear under the **Team** section.
9. Once the exam is completed, it will be available in the **Completed** folder of both the main performer and the additional performers.
10. After QA review, the exam will be available in the **Feedback** folder of all performers. All performers will receive credit for the exam.

Note The performer and specialty admin can assign additional performers.

Assigning an Exam to a Credentialed User

To complete the exam process, a non-credentialed user must assign the exam to a credentialed user for sign off.

TO ASSIGN AN EXAM TO A CREDENTIALED USER

1. After the exam is performed, ensure the worksheet is filled out.
2. Scroll down to **Team** section at the bottom, tap **Add Credentialed**.
3. A list of users credentialed for the chosen worksheet will appear. Choose the **Credentialed** user to whom the exam should be assigned.
4. Tap **Add** to confirm your selection.
5. The exam will appear in the credentialed user's **Sign Off** folder for review and sign-off.

Note The credentialed user is responsible for reviewing and signing off on the assigned exam.

Exam Destination

You can review where the exam will be archived under the Exam Destination section. All exams will be synced to Exo Works. If a PACS is configured by your admin, exams will also be sent to the PACS destination.

Confirm Patient and Submit Exam

1. Review and confirm the patient by checking the box.
2. Slide to **sign** and **submit** the exam.
3. The signed exam will then move to the **Completed** folder of the non-credentialed user and **Sign Off** folder of the credentialed user.

Sign Off as a Credentialed Reviewer

Credentialed users will find exams awaiting review and sign-off in the **Sign Off** folder on the home screen.

Ensure all clips and images are present in the exam before Sign-off.

TO SIGN OFF AS A CREDENTIALED REVIEWER

1. Open the exam to review patient information and documentation.
2. Verify all information and documentation.
3. If approved, Slide the bottom bar to sign.
   - If not approved, edit the performer's work, then proceed with signing.
4. The signed exam will move to the Completed folder of the credentialed user.

Quality Assurance (QA)

Selecting an Exam for QA Review

TO SELECT AN EXAM FOR QA REVIEW

1. Ensure you have the **QA Reviewer** role, which grants access to the **Quality** folder containing exams reviewed by performing and credentialed users.
2. Tap on **Quality** tab to view exams awaiting QA review. Exams are categorized into:
   - **Pending:** QA review has not yet started.
   - **In Progress:** QA review is underway but not completed.
   - **Reviewed:** Exams that are fully reviewed and submitted by a QA user.
3. Select an exam by browsing through the folders or using the search and sorting features in the search bar (see Searching, Sorting, and Filtering Exams).
4. Tap on the exam to assign yourself as the **QA Reviewer**. Your name will appear in the Team section of the exam.
5. Initiate the QA review by tapping on the **Rate** button at the bottom of the screen.

Performing a QA Review

TO PERFORM A QA REVIEW

1. Select an exam as described in the Quality Assurance (QA) section.
2. Tap on the **Rate** button to proceed.
3. View the worksheets of the performing and credentialed users. If there are multiple worksheets, they will be displayed at the bottom with their names and icons.
4. Tap on the worksheet icons to switch between them for review.
5. Complete the QA reviewer's worksheet by:
    - Agreeing with the final report
    - Scanning questions
    - Assessing image quality
    - Providing feedback
    - Adding flags for follow-up requirements
6. Your responses will determine if the performing and credentialed users receive credit.
7. Submit the review by Tapping on the **Submit** button. The exam will be marked as QA submitted and moved to the completed folder of the QA reviewer and the feedback folder of the performing and credentialed users.

Receiving a QA Feedback

1. Both non-credentialed and credentialed users will receive QA feedback.
2. Reviewed exams will be placed in the **Feedback** folder of both non-credentialed and credentialed users.
3. Open the **Feedback** folder and select the desired exam. The QA review will be displayed beneath the Team section.
4. Tap on the **Feedback** button or select the worksheet icon to view detailed feedback.
5. If the exam has been flagged, you can unflag it once the issue has been addressed with the QA reviewer.
6. After reviewing the feedback, the exam will remain in the **Feedback** folder of the respective user.

All Exams Folder Access for Specialty Admins

Specialty Admins have exclusive access to the All Exams folder, allowing them to:

- **Reassign Exams to Themselves or Credentialed Users:**
  - Specialty Admins can reassign exams to themselves or other credentialed users.
  - Once an exam has been submitted by the performer, the Specialty Admin can reassign a new credentialed user.
- **Reassign Themselves as QA Reviewers:**
  - Specialty Admins can assign themselves as QA reviewers, provided they have not performed the exam themselves.
  - If the exam has already been assigned a QA reviewer and the QA process is not yet complete, the Specialty Admin can take on this role.

Note	It is not permitted to unassign a user from an exam.

TO REASSIGN YOURSELF OR A CREDENTIALED USER TO AN EXAM

1. Open **All Exams** Folder.
2. Select and open the exam you wish to reassign.
3. Locate the **Team** section and click on the current performer's name.
4. Search and select a credentialed user (yourself or another) from the list.
5. The reassigned user's name will now appear in the **Team** section.
6. The exam will automatically move to the Drafts folder of the reassigned credentialed user.

TO REASSIGN YOURSELF AS A QA REVIEWER

1. Tap on the **Quality** tab on the home screen
2. Toggle to **In Progress**.
3. Open the exam you wish to reassign.
4. Tap on the current QA reviewer's name in the **Team** section.
5. Tap **Assign Myself as QA Reviewer.**
6. Your name will now appear in the Team section as the new QA reviewer.

Delete an Image or Exam

TO DELETE AN IMAGE

1. From Exo Works, images or clips can only be deleted in the **Drafts** Folder.
2. Tap on the **Drafts** Folder.
3. Tap on the image or clip you wish to remove.
4. Select **Select Scans**.
5. Select the image(s) or clip(s) for deletion. You can choose multiple items. If you select all, the entire exam will be deleted.
6. Tap on **Delete** to prompt a confirmation pop-up to confirm the deletion.
7. Once confirmed, the selected image(s) or clip(s) will be permanently removed from the exam.

TO DELETE AN EXAM

1. From Exo Works, Exams can only be deleted in the **Drafts** Folder.
2. Tap on the **Drafts** Folder.
3. Long press the exam to access the option to delete the full exam. Alternatively, open the exam and tap on the ⋮ button on the top right of the screen to prompt a dropdown with the delete option.
4. Deleting the exam will move it to the **Trash** folder.

Note

In the **Trash** folder, select the exam and choose to permanently delete it. Alternatively, click on the three-dot icon for the same option to permanently delete.

Exams in the **Trash** folder can be recovered within 30 days. After this period, they will be permanently deleted.

Recover a deleted exam

TO RECOVER A DELETED EXAM

1. Access the **Trash** folder.
2. There are two ways to recover an exam
   - Long-press on the exam to access and select **Recover**.
   - Tap on ⋮ icon for the exam to access and select **Recover**.

Sharing an Image or Exam

TO SHARE AN IMAGE

1. Select the exam to share.
2. Select one or all image(s) or clips(s).
3. Tap on the share icon.
4. A share window will appear, tap **Continue**.
5. When you tap continue, it will automatically open the iOS share kit where you can share the JPG or MP4 with any of the installed apps that allow sharing. For example, email, text, etc...

TO SHARE AN EXAM

1. Tap on the desired folder.
2. Tap on ⋮ icon at the top right corner for the exam to access and select **Share**.
3. A sharing window will open, giving you the below options
   - **Share with in my organization:** If you choose this option, a list of team members will appear. Select one or more users, then click **Share Exam**.
   - **Share public link:** Provides a public link, Copy and paste the public link to share the exam externally. The shared public link will expire after 30 days.

TO SHARE WITHIN MY ORGANIZATION

1. You can share the exam with a member of your organization using either of the following:
   - Tapping on the exam card menu and tap **Share**.
   - Open the exam and tap on the top right action menu and tap **Share**.
2. Tapping **Share** will open up a list of all clinical users within your organization. Select the desired team members to share the exam with.
3. Once shared, the exam will be moved into the **shared** folder of the user(s) that you have shared the exam with. Exams within the Shared folder are in a read-only format.

TO SHARE PUBLIC LINK

1. Select the exam to share.
2. Tap on ⋮ icon for the exam to access and select **Share Exam**.
3. A share window will appear. Select the Share Public Link to copy the secure URL.
4. In mobile, when you hit continue it will automatically open the iOS share kit where you can share the public link with any of the installed apps that allow sharing. For example, email, text, social, slack.
5. In web, paste the public link in applications installed on your PC to share externally.
6. The shared public link will expire after 30 days.

Favorite and Unfavorite an Exam

TO FAVORITE AN EXAM

1. Access the exam you want to favorite.
2. There are two ways to Favorite an exam:
   - Click the exam menu option on the exam to access and select **Favorite**.
   - Tap on ⋮ icon for the exam to access and select **Favorite**.
3. The exam will be placed in your **Favorites** folder.

TO UNFAVORITE AN EXAM:

1. Access the exam you want to unfavorite.
2. There are two ways to unfavorite an exam:
   - Click the exam menu option on the exam to access and select **Unfavorite**.
   - Tap on ⋮ icon for the exam to access and select **Unfavorite**.
3. The exam will be removed from your **Favorites** folder.

Commenting on an Exam

Any user with access can add a comment to an exam.

TO COMMENT

1. Open the exam you want to comment on.
2. Locate the message icon at the top.
3. After selecting, a text field will appear, showing potential previous comments.
4. Type your comment in the text field at the bottom.
5. Tap on icon to post the comment.
6. Your comment will appear beneath any previous comments.

TO DELETE A COMMENT

1. Select your comment.
2. Tap on icon.

Note	All comments will be retained for 30 days. After that, they will be automatically deleted from the exam's comment section.

Insights

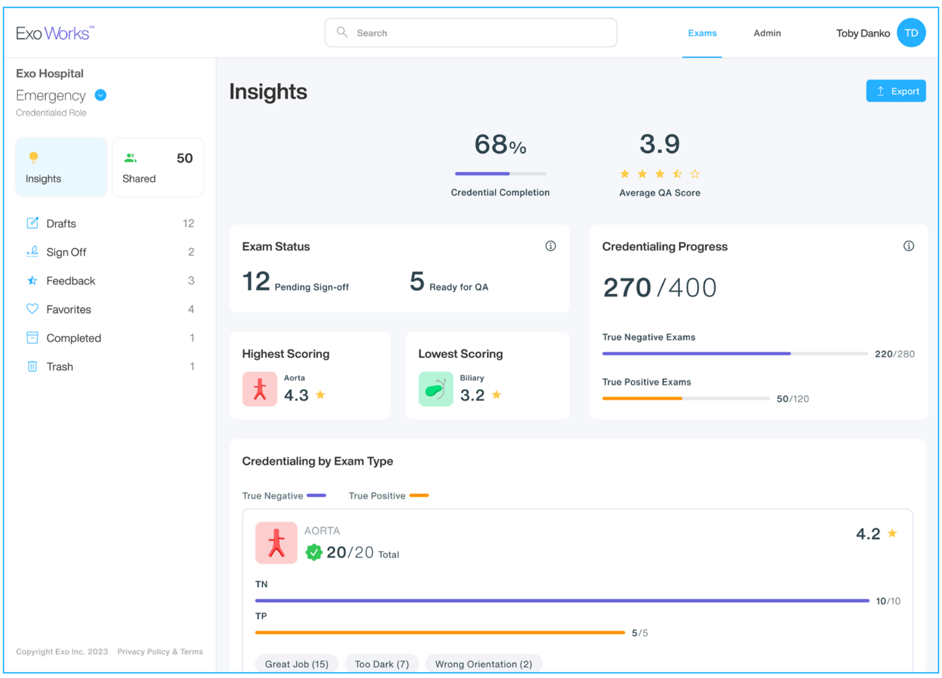
6

Insights

Chapter 6

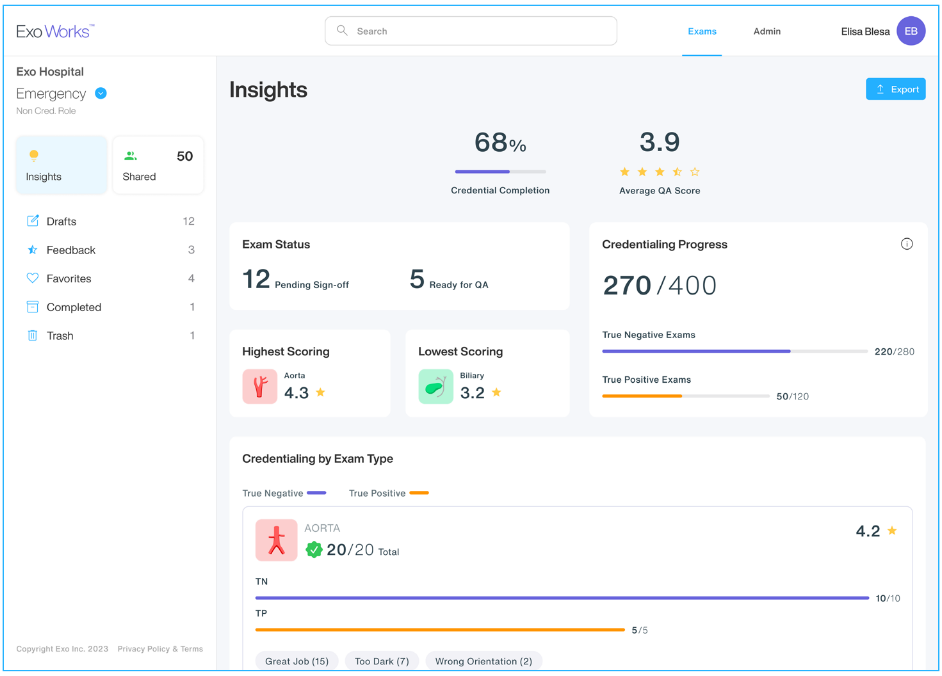
Insights View with Credentialing Program

INSIGHT DISPLAY FOR CREDENTIALED USERS WITH CREDENTIALING PROGRAM



1. **Credential Completion:** Credentialed users can see their completion percentage toward credentialing.
2. **Average QA Score:** User can view the average QA score for completed exams.
3. **Exam Status:** User can track the number of exams pending sign-off and those ready for QA review.
4. **Credentialing Progress:** The system provides a detailed breakdown of total completed exams, including true negatives and true positives breakdown.
5. **Highest Scoring and Lowest Scoring:** Users can monitor their highest and lowest scoring exam types.
6. **Credentialing by Exam Type:**
   - For users pursuing credentialing across multiple exam types, an overview displays earned credits and remaining requirements.
   - Detailed breakdowns by exam type are available for further analysis.
7. **Credentialed Exam Performance:** Users Performance metrics for their credentialed exam types, helps to identify strengths and areas for improvement.

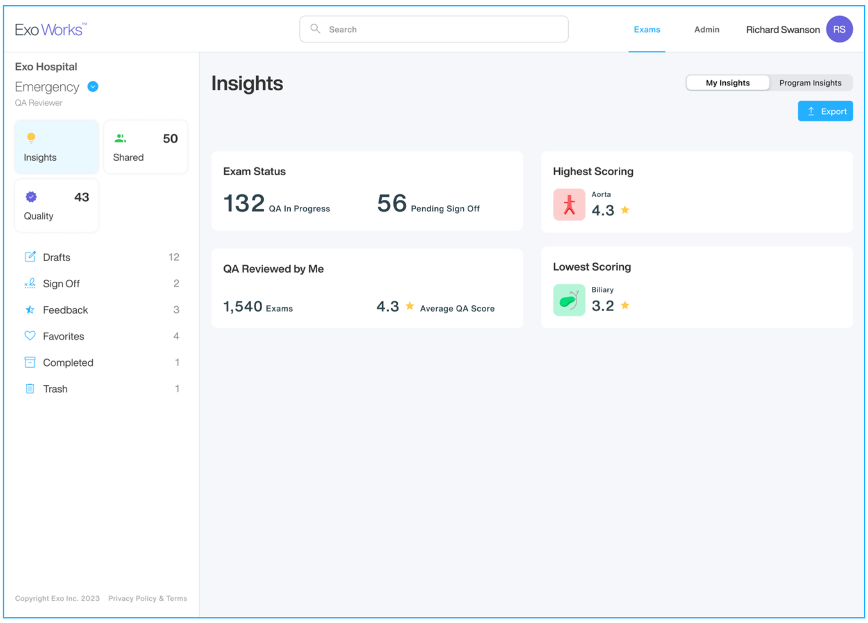
INSIGHT DISPLAY FOR NON-CREDENTIALED USERS WITH CREDENTIALING PROGRAM



1. **Credential Completion:** Non-Credentialed users can see their completion percentage toward credentialing.
2. **Average QA Score:** User can view the average QA score for completed exams.
3. **Exam Status:** User can track the number of exams pending sign-off and those ready for QA review.
4. **Credentialing Progress:** The system provides a detailed breakdown of total completed exams, including true negatives and true positives breakdown.
5. **Highest Scoring and Lowest Scoring:** Users can monitor their highest and lowest scoring exam types.
6. **Credentialing by Exam Type:**
   - For users pursuing credentialing across multiple exam types, an overview displays earned credits and remaining requirements.
   - Detailed breakdowns by exam type are available for further analysis.

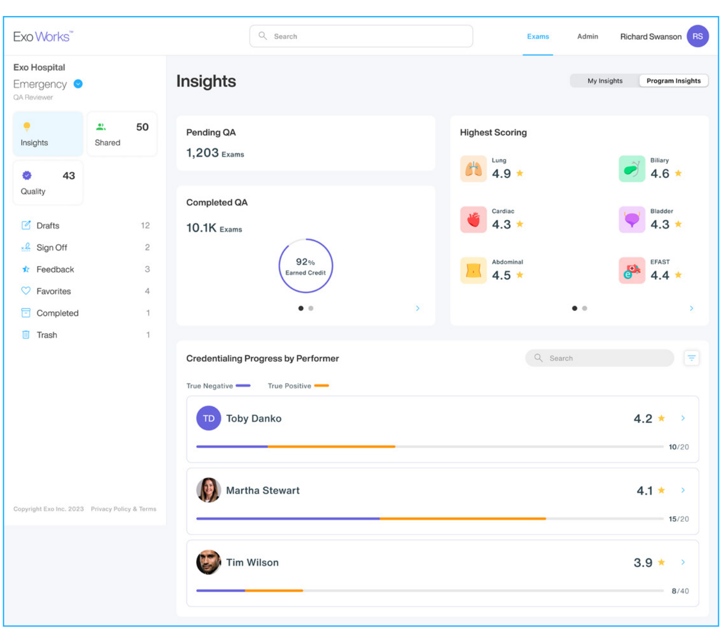
Note	Performers who have completed the required number of exams can still enhance their average QA score by continuing to conduct more exams.

My Insights for QA Reviewers and Specialty Admins



1. **Exam Status:** View the status of exams, including those in QA progress and pending sign-off. See the highest and lowest scoring exam types.
2. **QA Reviewed by Me:** Track your own QA activity, including the total number of exams reviewed and the average QA score provided.
3. **Highest Scoring and Lowest Scoring:** Users can monitor their highest and lowest scoring exam types.

Program Insights for QA Reviewers and Specialty Admins



1. **Pending QA:** Monitor the total number of exams awaiting QA review.
2. **Completed QA:** Track the total number of exams QA'ed, including the percentage earning a credit. Also, view the number of exams QA'ed per exam type.
3. **Exam Type Insights:** See the highest and lowest scores for each exam type.
4. **Credentialing Progress by Performer:** Track credentialing progress by performer, including a breakdown of true negatives and true positives.

Insights View without Credentialing Program

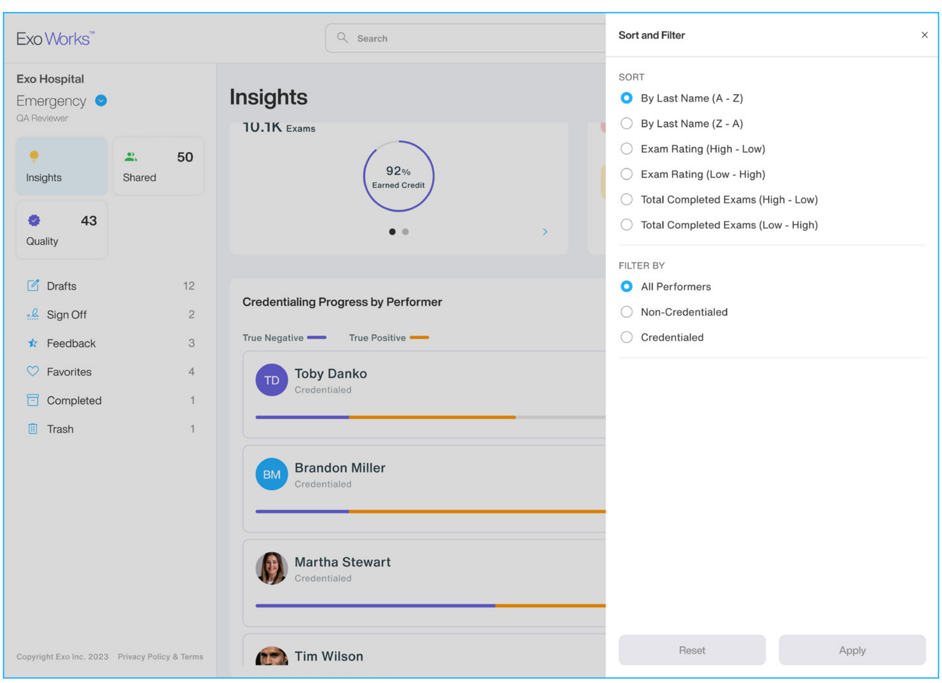
For non-credentialed and credentialed users not involved in a credentialing program:

- The Insights section will show the total number of exams pending sign-off and those ready for QA review.

For QA reviewers without participation in the credentialing program:

- Insights will display the total number of exams currently in QA progress, exams pending sign-off, and exams already reviewed by the QA reviewer.

Searching, Sorting, and Filtering Program Insights



TO SEARCH

1. Click on the **Search** icon in Credentialing Progress by Performer section.
2. Type in your search term, which can be:
   - Performer Name

TO SORT AN EXAM

1. Click button next to **Search** icon in Credentialing Progress by Performer section.
2. Choose from the available options:
   - **By Last Name (A - Z)**
   - **By Last Name (A - Z)**
   - **Exam Rating (High - Low)**
   - **Exam Rating (Low - High)**
   - **Total Completed Exams (High - Low)**
   - **Total Completed Exams (Low - High)**

TO FILTER AN EXAM

1. Click button next to **Search** icon in Credentialing Progress by Performer section.
2. Choose the filters from the available options:
   - All Performers
   - Non Credentialed
   - Credentialed

Exporting Insights

TO EXPORT INSIGHTS FOR CREDENTIALED AND NON CREDENTIALED USERS

1. Navigate to the **Insights** section on the Exo Works homepage.
2. Click **Export**.
3. Follow the on-screen instructions for both mobile and web applications to select PDF format and download location.

TO EXPORT MY INSIGHTS FOR QA REVIEWERS AND SPECIALTY ADMINS

1. Navigate to the **Insights** section on the Exo Works homepage.
2. Select **My Insights** on top right corner below your name/initials.
3. Click **Export**.
4. Follow the on-screen instructions for both mobile and web applications to select PDF format and download location.

TO EXPORT PROGRAM INSIGHTS FOR QA REVIEWERS AND SPECIALTY ADMINS

1. Navigate to the **Insights** section on the Exo Works homepage.
2. Select **Program Insights** on top right corner below your name/initials.
3. Select and open a Performer from the list in Credentialing Progress by Performer Section.
4. Click **Export**.
5. Follow the on-screen instructions for both mobile and web applications to select PDF format and download location.

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Glossary

Glossary

Chapter 9

Terms

Exam	An association of customizations specific to a clinical procedure.
Modality	In medical imaging, any of the various types of equipment used to acquire images of the body, such as radiography, ultrasound, and magnetic resonance imaging.
Credentialing	Process through which a performing provider in an ultrasound accreditation program attains certification.
EMR	An electronic medical record (EMR) is a digital version of the traditional paper-based medical record for a patient. The EMR represents a medical record within a single facility, such as a clinic or a hospital.
Quality Assurance (QA)	The process by which Non-Credentialed users get their ultrasound examinations and findings reviewed by a QA reviewer and get feedback.
QA reviewer	A user with QA permission. Providers with QA permission review the findings of Non-Credentialed users enrolled in an ultrasound accreditation program. Their agreements to Non-Credentialed clinicians' findings count for the required program passing scores.
Credentialed	A provider that attained certification through an ultrasound accreditation program. Users with credentialed rights are entitled to complete a worksheet, sign it, and send the associated report to EMR.
Non-Credentialed	A user that didn't attain certification through an ultrasound accreditation program. Users without credentialed rights can review patient worksheets, set their findings, and mark the worksheet as ready to be reviewed by an attending or QA reviewer.

Abbreviations

DICOM	Digital Imaging and Communications in Medicine
PACS	Picture Archival and Communication System
MWL	Modality Worklist
AE	Application entity
EMR	Electronic medical record
POCUS	Point of Care Ultrasound
MRN	Medical record number
SSO	Single sign-on
VNA	Vendor Neutral Archive

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