

User Manual

Exo Works[®]

Enterprise



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Introduction



Introduction

Chapter 1

About this user manual

This user manual is intended to provide the instructions for use for Exo Works® Software Workflow Manager. Exo Works is available on the web.

Exo Works is a software program that enables you to manage your point of care ultrasound (POCUS) procedures. Exo Works is an uncomplicated, intelligent, and intuitive ultrasound workflow solution that streamlines the steps to quality care for the patient.

Web and iOS Mobile App

Exo Works is accessible from a web app or Apple iOS mobile app. Both applications are easy to navigate. Refer to Chapter 8, [Apple iOS Mobile App](#), for details specific to the mobile application.

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



Getting Started

Chapter 2

About Exo Works software workflow manager

Exo Works POCUS workflow management program is a simple and intuitive user interface, making it easy to navigate through ultrasound exams, complete exam worksheets, view and share images, as well as reports.

Intended use

Exo Works is a workflow management system intended to provide the tools to manage POCUS programs. Users can manage and view ultrasound exams, document exam results, view exam images and image clips, review educational exams, and perform quality assurance (QA).

Exo Works also provides an option to manage the credentialing of ultrasound users.

Credentialed medical professionals are those that have completed an ultrasound training program defined by the medical institution. POCUS, however, also includes personnel learning on the job (for example, attending physicians, students, and residents), and they are authorized to collect ultrasound images and enter the exam notes; however, they are not credentialed to sign off on the documentation (completing the ultrasound paperwork). Instead, credentialed medical professionals must approve their ultrasound exams.

Exo Works can be configured to automatically archive exams to a Picture Archiving and Communication System (PACS) or Vendor Neutral Archive (VNA) and also transfer ultrasound exam results to an Electronic Medical Record (EMR) system.

Role-based system

Exo Works is a role-based system. The clinical administrator assigns users to a user group in a specific point of care specialty within a facility. The clinical administrator grants specific access permissions to each user group and may limit access to patient and exam data. Access and visibility are based on rights assigned by the clinical administrator.

Caution

A user can only belong to one facility and user group. If a user is added to a new group, the user will be removed from the previous group they were assigned to.

Connectivity

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

Cybersecurity

Caution

Follow all of your institution's security and cybersecurity policies when using Exo Works.

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

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](#).

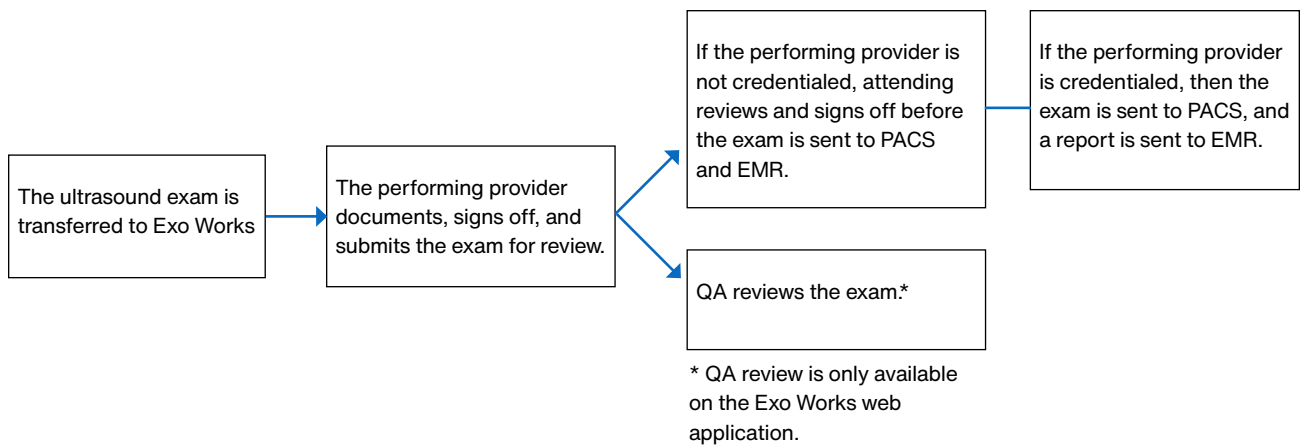
Exo Works configuration

The Exo Works installation team works with clinical administrators to set up and configure the Exo Works facilities, specialties, connectivity, users, and workflow. Refer to [Managing Administrator Tasks](#) for additional details.

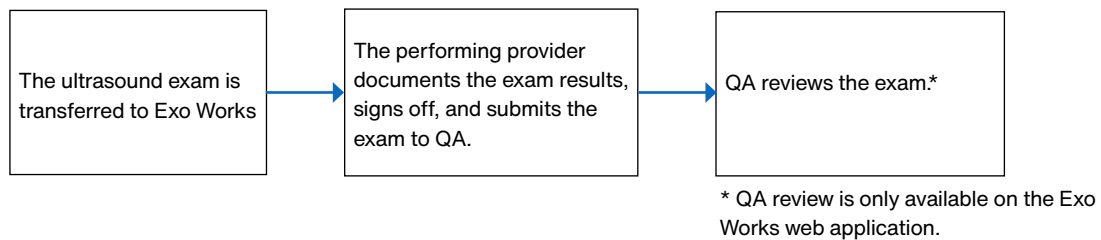
Clinical and Educational Workflows

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.

Clinical Workflow



Educational Workflow



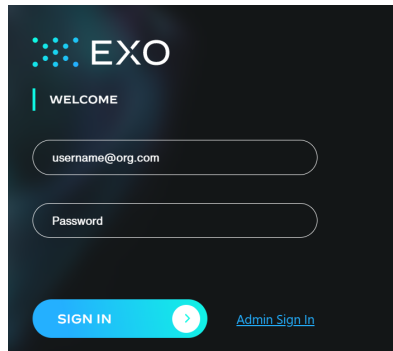
Registering and Signing in and out

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

Registering

To register

1. In the Welcome email, click the link. The Exo Welcome page displays.



2. If you are an administrator, click **Admin Sign In**; otherwise, proceed to Step 3.
3. In the **username@org.com** box, type the login ID you use at your facility.
4. In the **Password** box, type the password you use at your facility.
5. Click **Sign In**.
6. If this is your first time signing in to Exo Works, click **Agree** when the privacy popup displays, then you are directed to your inbox.
 - If you click **Back**, you are redirected to the Welcome page.

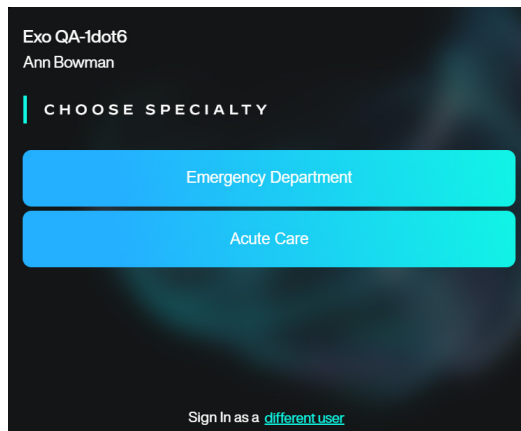
Signing in and out

Once you've registered for Exo Works, signing in is the same, except you won't receive the policy popup.

Signing in

To sign in

1. In the **username@org.com** box, type the login ID you use at your facility.
2. In the **Password** box, type the password you use at your facility.
3. Click **Sign In**.
4. Optionally, if you are assigned to more than one specialty, select the specialty from the pop-up window to perform and view exams for that specialty. You can change to another specialty from the Exo Works home page; see [Changing specialties](#) for more information.

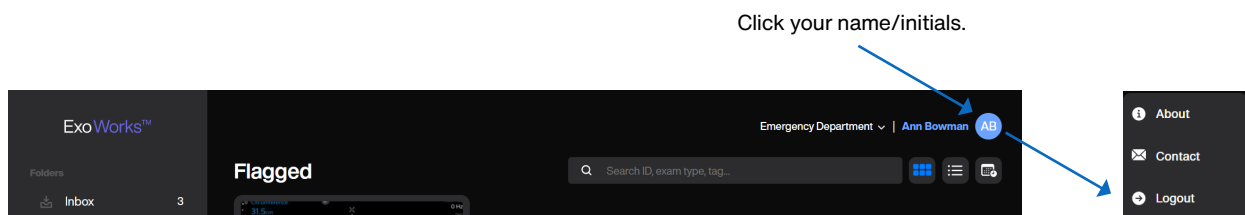


- To return to the previous screen and sign in as a different user, click **different user**.

Signing out

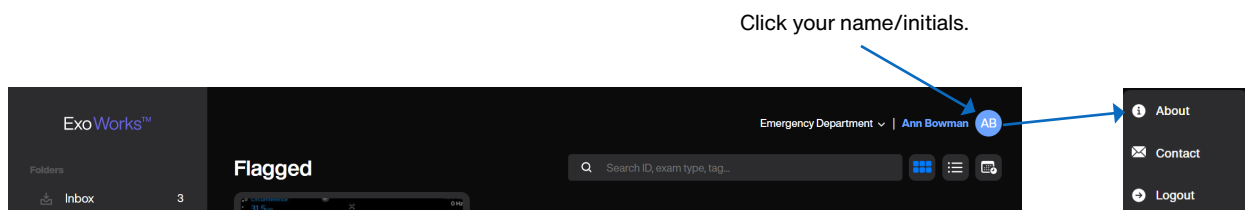
To sign out

- ❖ From the exam card view or exam list view page, click your name/initials at the top right of the screen, and select **Logout**.



Checking the software version

- ❖ To check the current software version, click your name/initials at the top right of the screen, and select **About**.



Managing Exams

3

Managing Exams

Chapter 3

Provider Workflows

Performing provider workflow overview

1. Performs the ultrasound exam, and sends it to Exo Works.
2. Signs into Exo Works, locates the exam, reviews the images and video clips, and documents the exam results on the worksheet.

Note

Refer to [Assigning an exam to yourself](#) if the exam is not already assigned to you.

3. Confirms that the patient and exam data is correct.
4. If it is a clinical exam, assigns an attending to the exam for review and attestation.
5. Signs off on worksheet.
 - The exam is automatically sent to the attending's inbox (if applicable) for review and to the QA reviewer's inbox for quality assurance assessment.
 - If the performing provider is a credentialed attending, the exam is automatically sent to the EMR and PACS.
 - The exam moves to the performing provider's Pending folder.

Attending provider workflow overview

For more detailed information about attending provider tasks, see [Managing Exams as an Attending Provider](#).

1. Signs into Exo Works, locates the exam in their inbox, reviews the images and exam worksheet documentation completed by the performing provider.
2. Signs off on the performing provider's exam to attest to the exam's accuracy.
3. For exams that are clinically indicated, the exam results are automatically sent to the EMR, and the exam images are sent to the PACS/VNA. (Educational exams are automatically sent to the Archived folder.)

The exam is automatically sent to the attending's Archived folder if the transfers to the EMR and PACS are successful.

QA reviewer workflow overview

For more detailed information about QA reviewer tasks, see [Evaluating Exams as a QA Reviewer](#).

1. Signs into Exo Works, locates the exam in their inbox, and reviews the exam for quality.
2. Documents the QA results on the QA worksheet, providing credit for the exam, as required.
3. Sends a request for the performing provider to review the QA results, as needed.

Note

If the performing provider has been asked to review the results of QA, the exam will go to the performing provider's Flagged folder.

4. Signs off on the QA results.
The exam is moved to the QA reviewer's Archived folder

Advanced QA Reviewer Workflow Overview

This section outlines the specific procedures for QA Reviewers when managing exams that have not yet been fully assigned to a Performer or Attending physician, or where the required sign-off processes are incomplete. Understanding these procedures is critical for ensuring proper exam routing and data integrity.

- When a QA Reviewer accesses an exam that has been performed but lacks assignment to a Performer or Attending, the Reviewer can complete the QA worksheet and initiate the routing process by assigning the appropriate clinical personnel.
- If only the Attending physician is assigned initially, the exam will be retained in the Unassigned folder. The exam will only progress through the standard review workflow upon the subsequent assignment of a Performer.
- The QA worksheet remains modifiable by the assigned Performer and Attending until the Attending physician affixes their electronic signature to the exam.
- Upon Attending sign-off, the QA worksheet becomes locked and is no longer editable by any user, including the QA Reviewer.

Note

The QA Reviewer's sign-off action does not transmit the exam results to the Electronic Medical Record (EMR) or the associated images to the Picture Archiving and Communication System (PACS).

For a comprehensive understanding of the rules governing assignment, sign-off behavior, and the subsequent routing of exams, including the implications for EMR/PACS transmission and credentialing eligibility, please see [Advanced QA Assessment Procedures](#).

Working with the Exo Works home page

You can easily access your exams, workflow notifications, and other summary information from the Exo Works home page. The home page is customized for you, whether you are a performing provider, an attending provider, or a QA reviewer. The home page also displays the number of exams in each category.

Viewing assigned exams

To view assigned exams

- ❖ From the Exo Works section of the Home page, select the Inbox folder on the left panel of the screen. A list of assigned exams appears on the right.

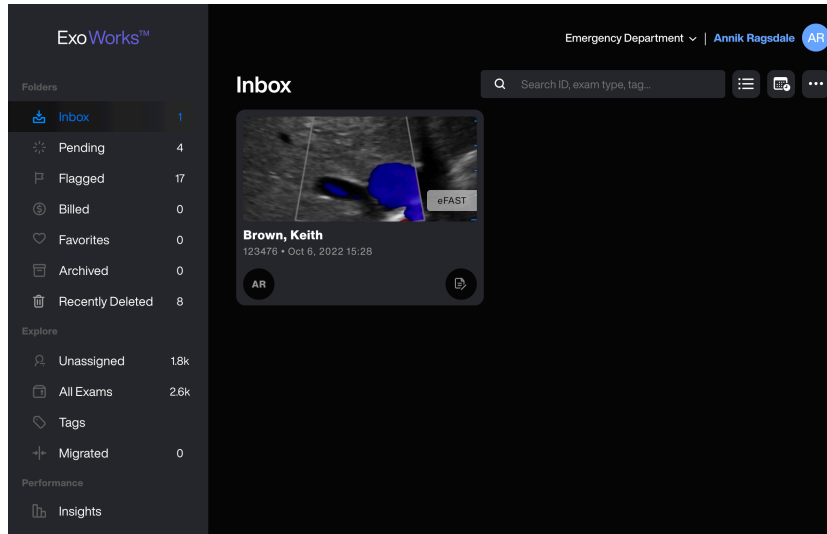
Viewing unassigned exams

To view unassigned exams

- ❖ From the Explore section of the Home page, select the Unassigned folder on the left panel of the screen. A list of unassigned exams appears on the right. To assign an exam to yourself, see [Assigning an exam to yourself](#).

Viewing exams by card view

The exam card view is the default mode.





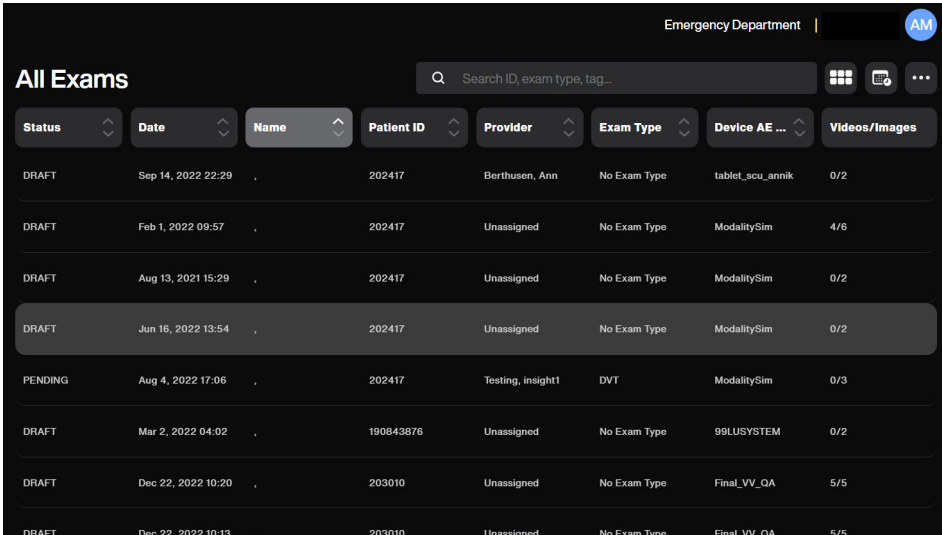
- **Inbox** - As a performing clinician, these are the exams to be completed. As an attending clinician, these are the exams to review. As QA reviewer, these are the exams to assess for QA.
- **Pending** - As a performing clinician, these are the exams waiting for attending and/or QA review.
- **Flagged** - As a performing clinician, these are the exams the QA reviewer assessed and requested you to review for feedback.
- **Billed** - As an attending clinician, these are the completed exams where the CPT codes were sent to EMR for billing.
- **Favorites** - These exams were added as favorites.
- **Archived** - These exams have finished the workflow process.
- **Recently Deleted** - These exams have been deleted within the last 30 days; you can restore one or more to your Inbox.
- **Unassigned** - These exams that do not have a performing provider assigned to them. If an exam is not in your Inbox, look for it in the unassigned folder, and [assign it to yourself](#).
- **All Exams** - All exams received in Exo Works of any status based on the specialty.
- **Tags** - To search for exams in the All Exams database with a specific tag or tags.
- **Migrated** - These exams are exported from a third-party vendor. The exams are read-only.
- **Insights** - Provides exam insights specific to your ultrasound training or billing activity. Clinical admin users have access to insights related to all users within a specialty.

Viewing a list of exams

The icons in the upper right corner of the dashboard toggle between the exam card and list views.

To view a list of exams


- ❖ Click the **Exam Card**  icon to switch to the exam card view.
- ❖ Click the **Exam List**  icon to switch to the exam list view.

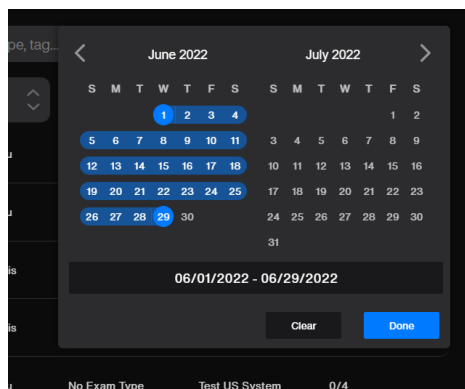


Status	Date	Name	Patient ID	Provider	Exam Type	Device AE ...	Videos/Images
DRAFT	Sep 14, 2022 22:29		202417	Berthusen, Ann	No Exam Type	tablet_scu_annik	0/2
DRAFT	Feb 1, 2022 09:57		202417	Unassigned	No Exam Type	ModalitySim	4/6
DRAFT	Aug 13, 2021 15:29		202417	Unassigned	No Exam Type	ModalitySim	0/2
DRAFT	Jun 16, 2022 13:54		202417	Unassigned	No Exam Type	ModalitySim	0/2
PENDING	Aug 4, 2022 17:06		202417	Testing, insight1	DVT	ModalitySim	0/3
DRAFT	Mar 2, 2022 04:02		190843876	Unassigned	No Exam Type	99LUSYSTEM	0/2
DRAFT	Dec 22, 2022 10:20		203010	Unassigned	No Exam Type	Final_VV_QA	5/5
DRAFT	Dec 22, 2022 10:13		203010	Unassigned	No Exam Type	Final_VV_QA	5/5

Viewing exams from a specific date range

To view exams from a specific date range

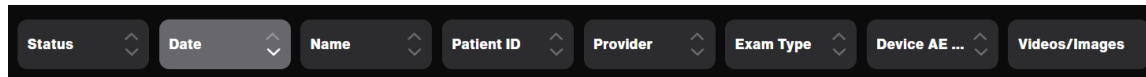
1. Select the **Date Range**  icon.
2. Select the start date, then select the end date. To start again, click **Clear**.
3. Click **Done**.



Sorting a list of exams

To sort exams in the list view

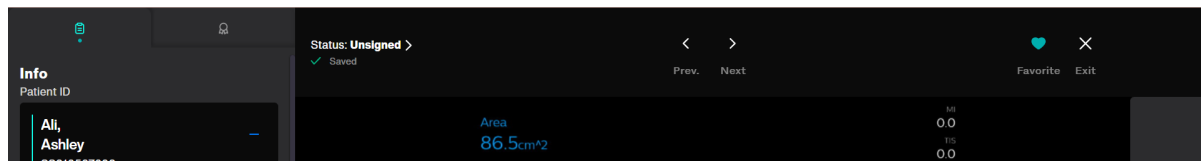
- ❖ Click a column header to switch between descending and ascending order.



- The **Device AE** column shows the ultrasound system that the exam was transferred from.
- The **Videos/Images** column shows the number of videos/images in the exam

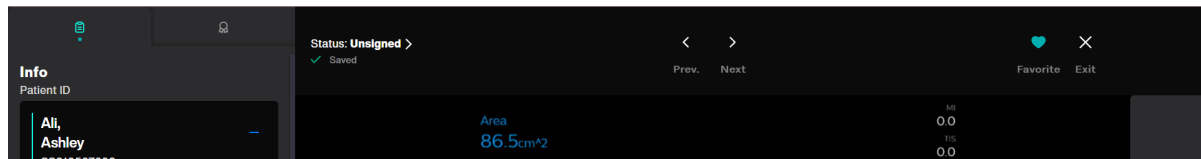
Navigating through a list of exams

You can find the exam navigation controls at the top center of the Image Review screen.



To move from one exam to the next in a list

- ❖ From the List screen, click the right arrow ➡ on the right to open the next exam; click the left arrow ⬅ to open the previous exam.



Searching for an exam

A search bar is located at the top of both the exam card and exam list views. Search for exams based on the following alphanumeric search information:


- **Exam date**—For example, =4 displays all the exams transferred to Exo Works in the past four days.
- **Patient name or medical record number (MRN)**
- **Provider name**
- **Exam category**—For example, a clinical versus an educational exam.
- **Exam type**—For example, a renal or cardiac exam type.
- **Accession #**
- **Exam tags**
- **AE title**

To search for an exam

1. Type the first two letters or numbers of the search criteria. For example, type be to search for a provider with the last name of Bennett. A list of possible matches displays.
2. Select from the displayed list, or continue typing to narrow the list down.
3. To add additional search criteria, select to the right of the already entered search criteria. Enter the first two letters or numbers to view possible matches or continue entering data to further narrow down the list.
4. The exams displayed are updated as the search criteria is entered.

Deleting an exam

To delete an exam

1. From the card or list view, select the exam you want to delete.
2. Click the **Trash**  icon and, when prompted, click **Confirm**.

Changing specialties

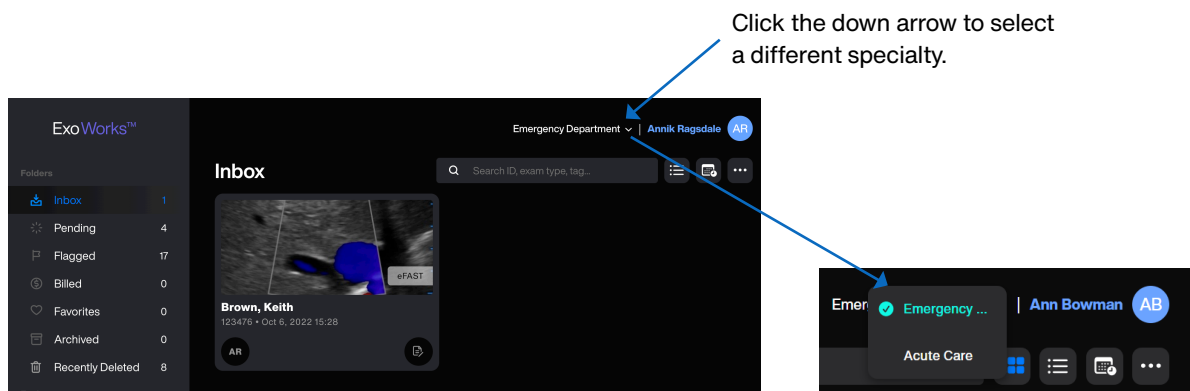
If you are a multi-specialty provider, you can change to another specialty from the Exo Works home page. When you choose a different specialty, Exo Works only shows the exams in that specialty.

Note

When you search within a specialty, the search is contained to only that specialty

To change specialties

- ❖ From the Exo Works home page, select a different specialty to view those exams.



Working with exams

Opening an exam

To open an exam

- ❖ From either the exam card or list view, click the exam you want to open. The exam opens in the Exam Review screen.

Reviewing an exam

Selecting an exam from either the exam card view or exam list view opens the exam in the Exam Review screen.

Exam Review screen

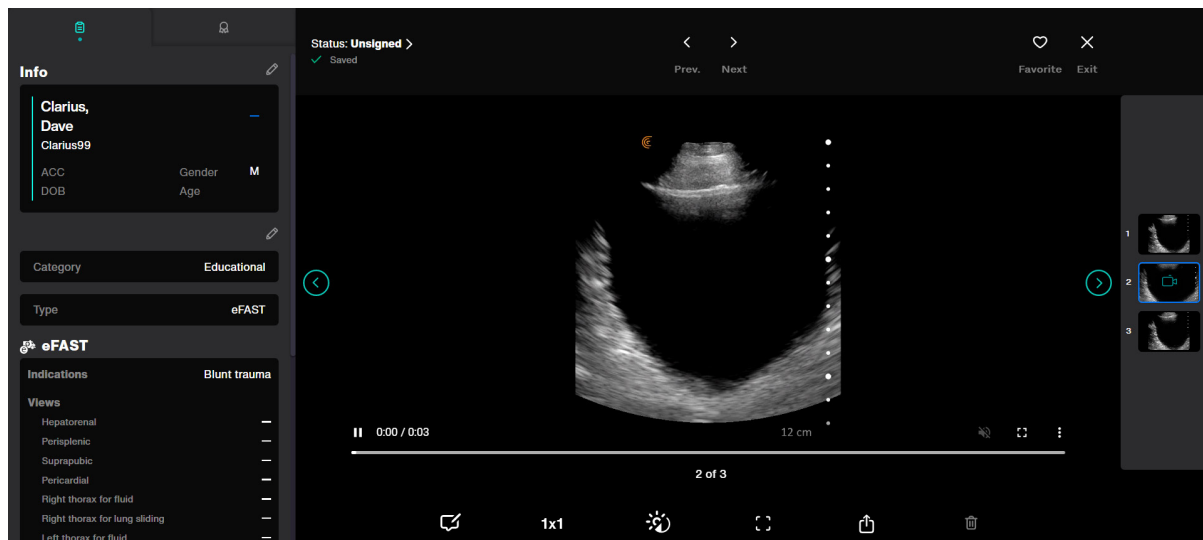
Viewing multiple images/clips in an exam

To view the images/clips in an exam

1. Click the blue arrows on the screen to view each image/clip.

or

2. Click the thumbnail of the image/clip you'd like to see.



3. From the Exam Review screen, you can:

- View the exam's images and video clips.
- Edit patient/exam data.
- Complete or review the exam worksheet.
- Perform a QA review.

Note

- The patient/exam information that displays is dependent on availability. For example, there may not be a patient name listed on the exam card if the information was not entered on the ultrasound system.
- Access and visibility to features in the Exam Review screen are dependent on your permission levels set by the clinical administrator.

Exam details

The diagram shows an exam card with the following details:

- Patient name:** Neal, Stacy
- MRN and date & time of exam:** SS757496289 • Yesterday 16:55
- Exam type:** Biliary
- Exam type status indicator:** A circular icon with a document symbol, which can be hovered over to check the status.
- The initials of the performing provider:** AN. A note states: "Hover over the icon to see the full name. If blank, a provider has not yet been assigned. If desired, you can assign it to yourself."

A legend for the exam type status indicator is provided below the card:

- Draft** - Exam is not signed off by performing provider.
- Pending** - Exam is waiting to be reviewed by the attending provider or QA reviewer.
- Failed archive** - Exam failed to transfer either to the EMR or PACS/VNA.
- Educational exam** - Exam is for educational/ teaching purposes only.
- Archived exam** - Clinical exam successfully transferred to EMR and PACS/VNA.

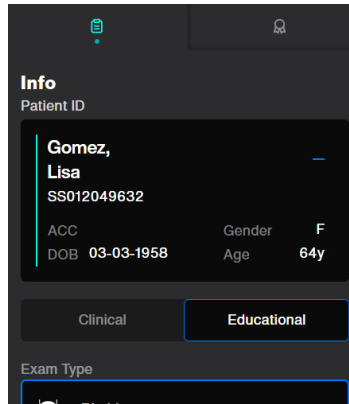
Selecting an exam category

Ultrasound exams can be either for clinical or educational purposes.

- Clinical exams have billing codes (CPT) or billable procedures associated with them, and the CPT codes, along with the exam results, are sent to the EMR.
- Educational exams are not sent to the EMR for billing. These exams are kept in Exo Works for training purposes only.

To select an exam category

- ❖ Select another category.



The screenshot shows a patient information form with the following details:

Info			
Patient ID			
Gomez, Lisa			
SS012049632			
ACC	Gender	F	
DOB 03-03-1958	Age	64y	

Below the patient information, there are two tabs: "Clinical" and "Educational". The "Educational" tab is currently selected. Below the tabs, there is a section labeled "Exam Type" with a dropdown menu.

Assigning and unassigning an exam

You can only assign an unassigned exam to yourself.

Assigning an exam to yourself

If you are a performing provider, you can unassign yourself from an exam (as long as you haven't signed it yet).

To assign an exam to yourself

1. From the Explore section of the Home page, select the **Unassigned** folder on the left panel of the screen. A list of unassigned exams appears on the right.
2. Select the exam you want to assign to yourself. The exam opens with the patient/exam data on the left panel and the image viewing panel on the right.
3. From the Team section at the bottom of the left panel, click the blue (+) next to **Add Performing**.
4. When prompted, click **Confirm**. The exam is added to your inbox.
5. Complete the exam now or later.

Unassigning yourself from an exam

If you are a performing provider and haven't yet signed an exam, you can unassign yourself. You will lose anything you've completed on the worksheet.

To unassign yourself from an exam

1. From the Exo Works home page, select the exam you'd like to unassign.
2. From the Team section, click the blue arrow >.
3. When prompted select Remove. The exam moves to the Unassigned folder.

Changing patient and exam information

Before changing exam and patient data, the performing provider must be assigned the exam.

Changing patient information

You can only change patient if it's an order-based workflow.

To change patient information

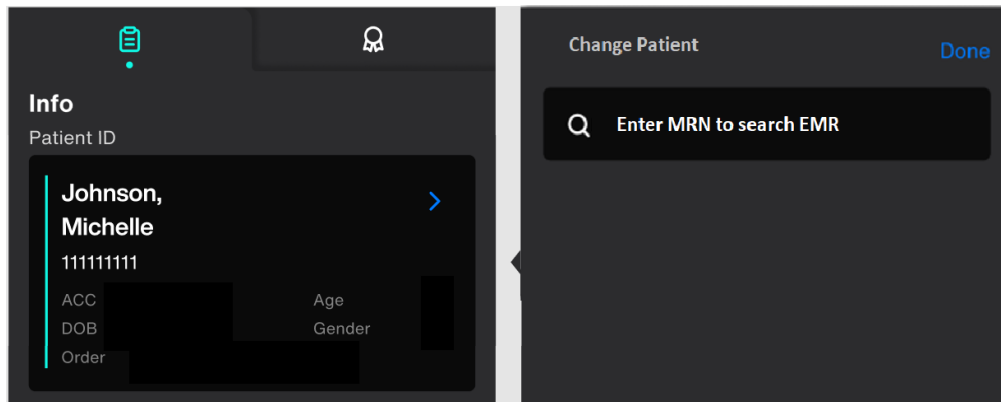
1. From the Exam Review screen, select the blue (—) in the patient ID box on the left panel of the screen.
A list of patient names displays.
2. Search for the correct patient.
3. Click the correct patient.
4. At the prompt, click **Confirm**.

Changing the patient's MRN (patient ID)

You can only change the patient's MRN if it's an encounter-based workflow.

To change the patient's MRN

1. From the Exam Review screen, select the blue (>) in the patient ID box on the left panel of the screen.
2. Type the correct patient MRN.
Exo Works automatically queries the EMR and retrieves the patient information based on the MRN you entered.



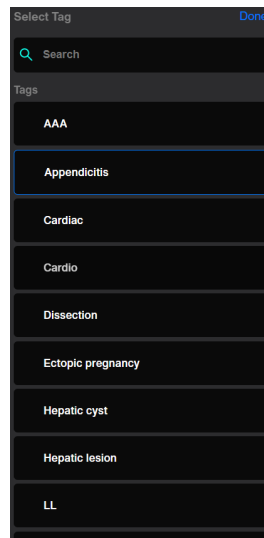
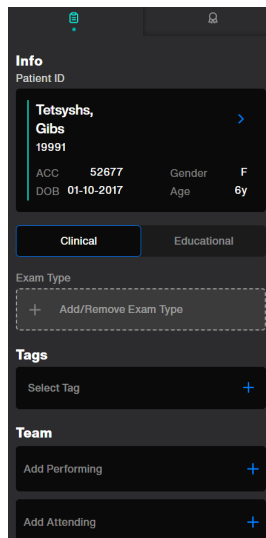
Managing exam tags and favorites

Tagging an exam

You can apply tags to your exam so you can refer to it later. These exams are put in the Tags folder. You can also search for other provider's tagged exams in the exam database.

To tag an exam

1. From the Exam Review screen, select the blue (+) in the Tags box on the left panel of the screen. A list of tags displays.
2. Click one or more tags. Each selected tag has a blue box around it.



3. Click **Done**. The selected tag(s) appears in the Tags box.

Viewing tagged exams


To view tagged exams

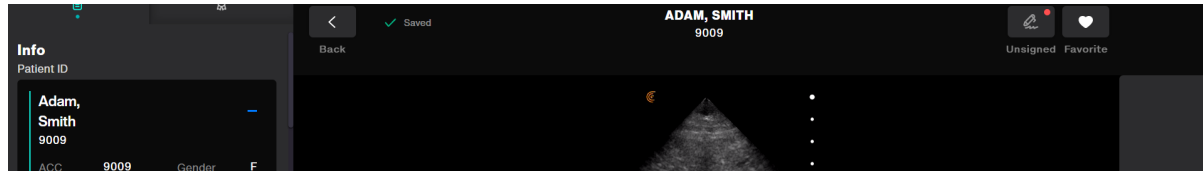
- ❖ To view the exams you have tagged, return to the Home page, and select the Tags folder. To view other providers' tagged exams, select the All Exams folder, and type the tag(s) you would like to view.

Adding a favorite exam

You can mark an exam as a favorite, and Exo Works will add it to the Favorites folder.

To add a favorite exam

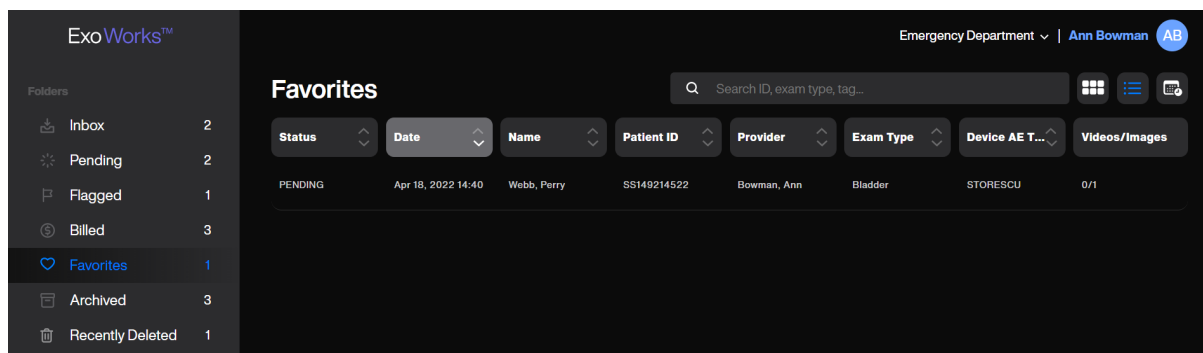
- ❖ Select the **Favorite**  icon to add an exam to the Favorites folder.



Viewing favorite exams

To view favorite exams


- ❖ From the Exo Works section, select the Favorites folder. A list of all the exams selected as favorites is available to view.



Deleting images from an exam

You can only delete images/clips assigned to you.

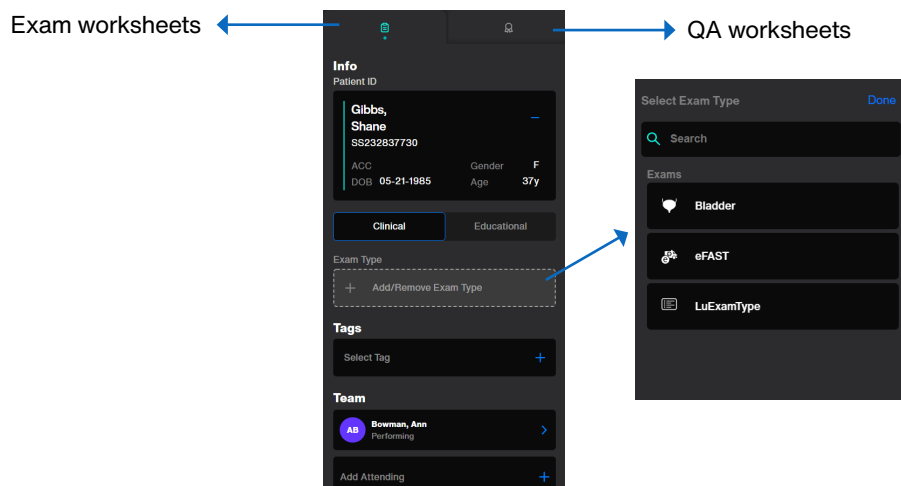
To delete images from an exam

1. From the Exam Review screen, click the **Trash**  icon at the bottom of the screen.
2. When prompted, select one or more images that you would like to remove, and click **Delete**.
3. To cancel the action, click the **X** in the upper right corner.

Using worksheets

There are two worksheets associated with an exam: an Exam worksheet and a QA worksheet. Two tabs at the top let you easily move between the Exam worksheet and the QA worksheet. If you are a performing provider, you can view both worksheets, but only those with QA permissions can complete the QA worksheet.

The permissions are set by the clinical administrator.



The Exam worksheet automatically displays after you select the associated exam type. Use the worksheet to document the exam results. Typically, the worksheet is divided into several sections; for example, indications, views, findings, and interpretation.

Selecting an exam type

Exam worksheets are associated with different exam types. When you select the exam type, the associated worksheet automatically displays.

To select an exam type

1. To display a list of exam types, click the **+** symbol next to **Exam Type**.
2. Select an exam, and click **Done**.

Selecting multiple worksheets

You can add one or more anatomical worksheets for a selected exam. The multiple worksheet option is only available for educational exams.

Note

- Complete the mandatory fields of each worksheet before signing.
- Click Review to view the summary of the exam results and sign off.

To select more than one worksheet

1. Click **Educational** to change the exam category.
2. Click **Add/Remove Exam Type**, and select the worksheets related to the exam.



The screenshot displays the EXO WORKS interface. On the left, the 'Info' section shows patient details: Patient ID SS232837730, Name Gibbs, Shane, ACC, DOB 05-21-1985, Gender F, and Age 37y. Below this, there are tabs for 'Clinical' and 'Educational', with 'Educational' currently selected. Under the 'Exam Type' section, 'eFAST' and 'LuExamType' are listed. At the bottom of this section is a dashed box labeled '+ Add/Remove Exam Type'. On the right, the 'Exams' section shows a search bar and a list of exams. The 'Bladder' exam is selected, and it shows two associated worksheets: 'eFAST' and 'LuExamType', each with a refresh icon and a trash icon.

3. Click anywhere to close the exam list. Complete the worksheets.

Deleting or resetting a worksheet

You can delete any of worksheets you have selected. You can also reset all the values you've selected for a worksheet. This clears the worksheet.


To delete or reset a worksheet

- ❖ Click **Add/Remove Exam Type**, and select either the **Trash**  icon or the **Reset**  icon.

Marking an exam as unremarkable

You can mark an exam as unremarkable. This option automatically populates some sections of the worksheet with predefined selections.

Note

- The predefined fields are determined by the clinical administrator for each exam worksheet.
- Confirm that the patient information is correct before signing the exam.
- In review mode, edit any of the sections by selecting the **Edit**  icon.
- If the performing provider is not credentialed and the exam is clinically indicated, you must select an attending to review the exam and sign off. The exam will automatically be sent to the PACS/ EMR after the attending signs.

To mark an exam as unremarkable

1. Click the **Mark as Unremarkable exam** slider to turn it on.

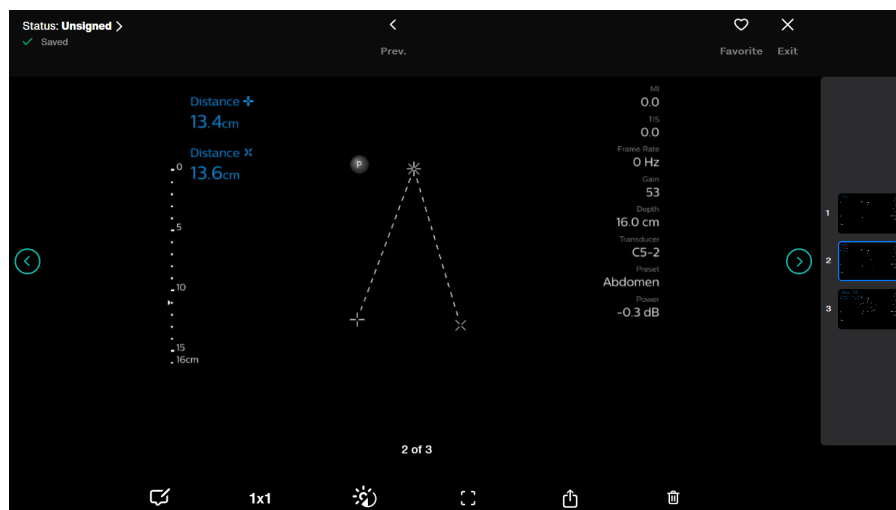
The screenshot shows the 'Info' screen for a patient named Adam, Smith. The patient ID is 9009. The ACC is 9009, Gender is F, DOB is 01-03-1994, and Age is 28y. The 'Exam Type' is 'Appendix'. The 'Worksheet' section has a 'Mark as Unremarkable exam' slider that is turned on. The 'Indications' section has 'Abdominal pain' selected.

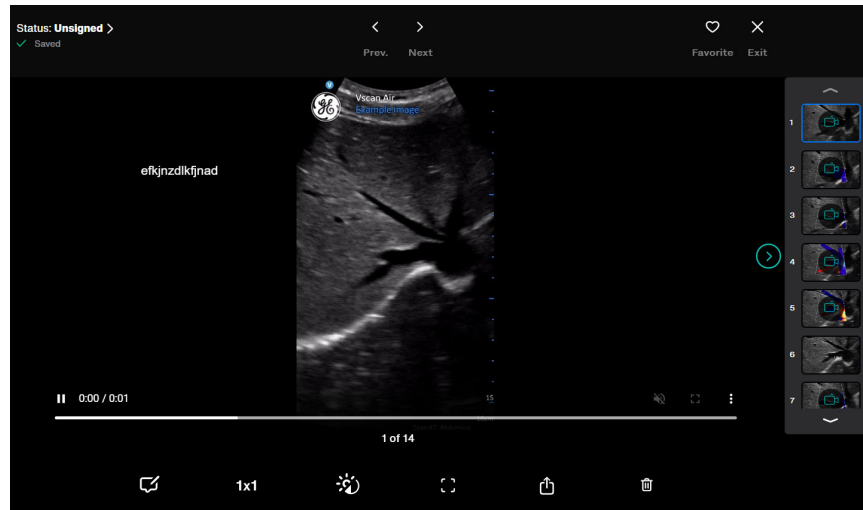
2. Select one or more **Indications**.
3. Click **Review**.

Managing images and clips

When the Image/Video Clips screen opens, there are image thumbnails on the right panel. You can scroll through the thumbnails, and select an individual image or clip to view. You can switch between a single image (1x1), two images (1x2), or four images (2x2) to view by selecting the View Layout icon.

A full screen option is also available in any of the image views.





Reviewing exam images


To review exam images

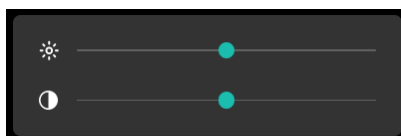
1. Open the exam by selecting the exam of interest from the Exams List screen. The exam thumbnails are shown on the right of the screen, and the patient/exam data is on the left.
2. Scroll through the image thumbnails on the right to advance to the next image or clip. Alternately, advance through the thumbnails using the small arrows on either side of the main viewing area (or by using the arrow keys on the keyboard).
3. Select any image thumbnail to make it the active image on the screen.

Adjusting an image's brightness and contrast

To improve visualization, you can adjust the contrast and brightness level of an ultrasound image.

To adjust an image's brightness and contrast

1. Select the **Brightness**  icon at the bottom of the image viewing screen.
2. Use the sliders to adjust the contrast and/or brightness to the desired level.



3. Optionally, click **Reset** to return to the default levels.

Changing the image view layout

To change the image view layout

1. To toggle to the 1x2 layout, click the **Layout 1x1** icon.
2. Continue to click the **Layout** icon to toggle through the image layout you prefer.

1x1

1 x 1 layout

1x2

1 x 2 layout

2x2

2 x 2 layout

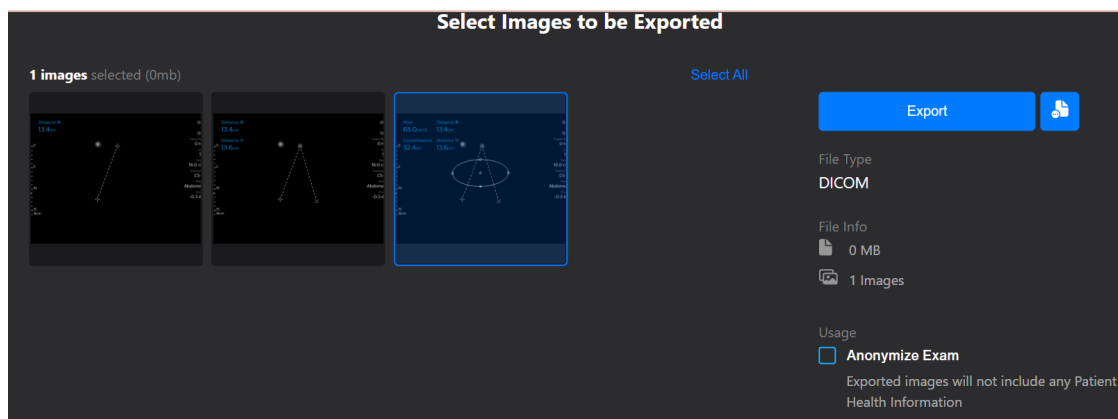
3. To expand to full screen view, click the **Full Screen** icon.
4. To return to the normal screen, click the **Shrink Screen** icon.

Exporting images and clips from an exam

From Exo Works, you can export images and clips to DICOM, JPG/MP4, or all.

To export images and clips from an exam


1. Open the exam you want to export files from.
2. Click the **Export** icon, and browse to where you'd like to save the files.
3. Select one or more images to export, or click Select All.

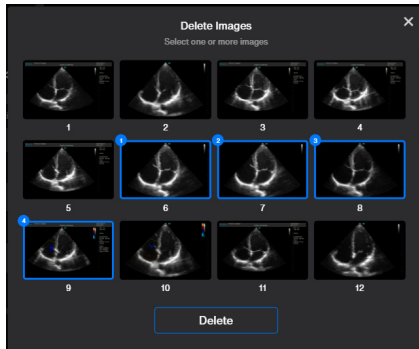


4. Click the **File Type** icon, and choose an option.
5. Optionally, to send only the images/clips without any patient information, click to deselect the **Anonymize Exam** check box.
6. Click **Export**. The exam is exported to the Download folder; do not close the web app while the export is in progress.

Deleting an image

To delete an image



1. Select the **Trash**  icon. The Delete Images screen displays with all the thumbnail images/clips in the study.
2. Select the images you want to delete.



3. Click **Delete** and, when prompted, click **Confirm**.


Playing/pausing a clip

To play a clip

By default, a clip automatically plays when you open it; to pause it, click the **Pause**  button; to play it again, click the **Play**  button.

Adding and deleting annotations

To add annotations to an image

1. Select the image you want to annotate.
2. Click the **Annotation**  icon. A cursor appears in the upper left portion of the image screen.
3. Type a name for your annotation.
4. Click and hold the annotation to drag it to another location.

To delete an annotation

- ❖ Click the **X** next to the text.


Splitting and merging exams

You can split and merge exams from either the card view or the list view.

Splitting exams

You can move one or more images and clips from one exam to a new exam. You can split an exam only if it is assigned to you and not yet signed.


To split images to a new exam

1. From the Exo Works home page, click the **Options**  icon, and select **Split**.
2. Select the exam you'd like to split.
3. Select the images you'd like to move to the new exam, and click **Create New Exam**.
4. At the prompt, click **Yes**. Exo Works creates a new exam with the images/clips you chose.

Merging exams

You can merge two exams that are in your inbox, have the same patient's MRN on both exams, and not yet signed. You cannot merge more than two exams at a time. The images/clips from the child exam will be merged into the parent exam. After the merge is complete, only the parent exam will remain, and the child exam will be deleted.

To merge two exams

1. From the Exo Works home page, click the **Options**  icon, and select Merge.
2. Drag and drop one of the exams you'd like to merge over the other.
3. From the Merge Exams screen click the up/down arrows to change the order of the exams (the parent on top and the child on the bottom).
4. Click **Merge**.
5. At the prompt, click **Yes**.

Viewing exam worksheets

There are two worksheets associated with every exam: An exam worksheet and a QA worksheet. Two icons at the top of the left panel let you toggle between the exam worksheet and the QA worksheet.

Once you've selected an exam type, the exam worksheet automatically displays. Use this worksheet to document the exam results. Typically, the worksheet is divided into several sections such as, indications, views, findings, and interpretation.

Info

Patient ID

**Adam,
Smith**
9009

ACC	9009	Gender	F
DOB	01-03-1994	Age	28y



Note

You can view the QA worksheet, but you can only complete the QA worksheet if you have QA permissions. Permissions are set by the clinical administrator.

To select an exam type

1. From the Exam Review screen, click **Add/Remove Exam Type** in the Exam Type box on the left panel of the screen.
2. Select an exam type from the list.
3. At the prompt, click **Confirm**.
The exam worksheet displays.

To toggle between the worksheets

Once you've selected an exam type; to select QA worksheet, click the QA  icon; to return to the exam worksheet, click the exam  icon.

Understanding Insights



Understanding Insights

Chapter 4

Introduction

With insights, you can review your metrics and create reports. If you are a clinical administrator, you can review the metrics for the organization and enable or disable insights for each user group in the organization, as described in Chapter 7, [Managing Administrator Tasks](#).

Note

Insights are not always the same for credentialed and uncredentialed users.

There are three different insight views:

- Insights for uncredentialed providers
- Insights for credentialed providers
- Insights for clinical administrators

Each view has three subsections, including quality, efficiency and progress/billing. These views are explained in detail.

All of the information displayed in insights corresponds to a specific range of time, and you can select from the following date ranges.

- 7 days
- 30 days
- 90 days
- 1 year
- All time (default)

Viewing Insights

From the Insights page, you can view your metrics and reports for a range of time.

To view Insights

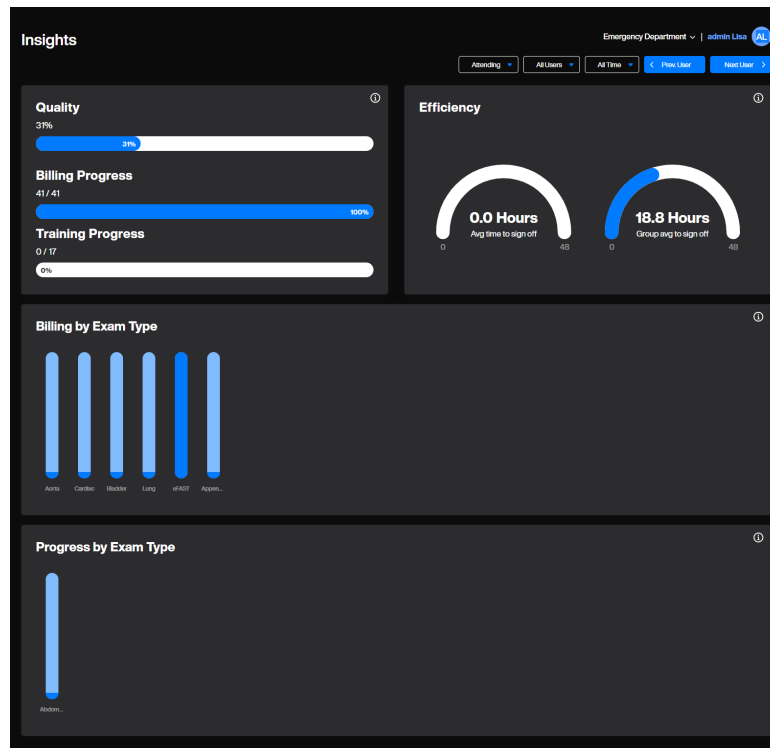
1. From the Home screen, click **Insights** at the bottom of the screen. The default is to show the metrics from the time you started working in Exo Works.
2. To narrow the metrics to a different time period, click the **All Time** list, and select an option.

Insights for uncredentialed providers



- **Quality** is the percentage of exams that meet the quality standards for all the exams performed combined based on all the exams that has been completed and have gone through the QA process over a specific date range. “Meet the quality standards” means that the QA reviewer checked the **Credit Earned** check box.
- **Billing Progress** shows the number of exams completed by the current providers that meet the quality standards over a specific date range based on the total number of exams that have been requested by the clinical administrator for the provider to complete their training.
- **Efficiency** is the average time the provider took to complete their exams (taking into account all the exams completed over a selected date range). The time starts from the moment the exam is received in the provider’s inbox until the exam is signed off is displayed in hours.
 - **Average Time to sign off:** Your average time to complete an exam from the time it’s assigned until it’s signed off.
 - **Group avg to sign off:** The average time of the performing providers in a user group.
- **Progress by Exam Type** is the percentage of exams that meet the quality standards for all the exams performed combined based on all the exams that has been completed and have gone through the QA process over a specific date range. “Meet the quality standards” means that the QA reviewer checked the **Credit Earned** check box.

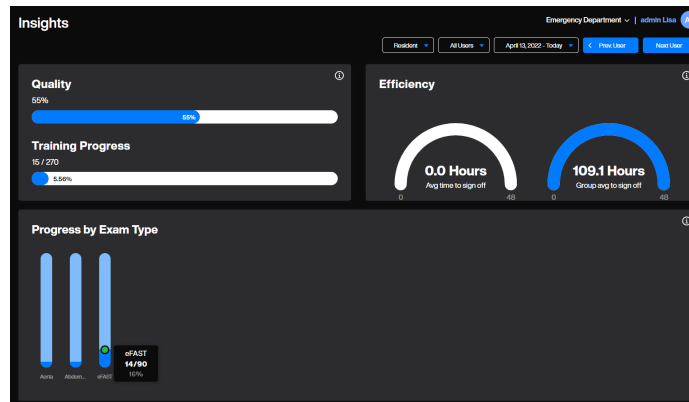
Insights for credentialed providers



- **Quality** is the percentage of exams that meet the quality standards for all the exams performed combined based on all the exams that has been completed and have gone through the QA process over a specific date range. “Meet the quality standards” means that the QA reviewer checked the **Credit Earned** check box.
- **Billing Progress** shows the number of clinical exams completed with at least one billing code selected over a specific date range based on the total clinical exams completed. These exams have been signed off by both the attending and QA reviewer, then applied and archived. These exams could come from either a performing or attending provider.
- **Training Progress** shows the percentage of all exams completed that were assigned to you by the clinical admin over a given period of time. This is a percent ratio of all your exams completed for training to the total number of exams that were assigned to you for training.
- **Efficiency** is the average time the provider took to complete their exams (taking into account all the exams completed over a selected date range). The time starts from the moment the exam is received in the provider’s inbox until the exam is signed off is displayed in hours.
 - **Average Time to sign off:** Your average time to complete an exam from the time it’s assigned until it’s signed off.
 - **Group avg to sign off:** The average time of the performing providers in a user group.
- **Billing by Exam Type** shows the billing progress by exam type. Hover over an exam type to see the number of clinical exams billed versus the total number of clinical exams with or without billing codes.
- **Progress by Exam Type** shows the percentage of exams take into account are those that have been signed by both the attending provider and QA reviewer (if applied and archived) for a specific exam type.

Insights for clinical administrators


The clinical administrator can view the Insights report for a specific user or user group.



- **Filters:**
 - Select a specific user group.
 - Select **All Users** or a specific user.
 - Select a date range.
 - Optionally, click **Previous User** or **Next User** to select another user.
- **Progress by Exam Type** shows the billing progress by exam type. Hover over an exam type to see the number of clinical exams billed versus the total number of clinical exams with or without billing codes.
- The **percentage** of exams take into account are those that have been signed by both the attending provider and QA reviewer (if applied and archived) for a specific exam type.

Exporting Billed Exams

Exo Works provides users with the capability to export all billed exams, facilitating efficient record-keeping and analysis. Follow the steps below to export your billed exams:

1. **Accessing Billed Exams:**
 - Navigate to the **Billed** section within Exo Works.
 - This section contains all exams that have been billed and are ready for export.
2. **Creating a Report:**
 - In the Billed section, locate the **three-dot**  icon positioned at the top right corner of the interface.
 - From the dropdown menu, select **Create Report**.
3. **Downloading the Report:**
 - Exo Works will generate a report containing information about the Billed exams.
 - The report will be automatically downloaded to your device.


Report Contents: The exported report will contain the following details for each billed exam:

- Patient MRN (Medical Record Number)
- Patient Name
- Exam Type
- Performing Name
- Attending Name
- Accession Number
- Exam Date
- Attending Review Date
- Device Manufacturing Name
- Number of Images/Clips
- AE Title
- Specialty
- Account Number
- Order ID
- Exam Status

Exporting All Exams

Exo Works allows users to export All Exams for efficient record-keeping and data analysis. This feature is available to both performers and admins. Follow the steps below to export exam data:

1. Select a Date Range:

- Navigate to the **All Exams** section within Exo Works, click the **calendar**  icon located at the top-right corner above the exam list.
- Choose the desired date range and click **Done**.

2. Creating a Report:

- In the All Exams section, locate the **three-dot**  icon positioned at the top right corner of the interface.
- From the dropdown menu, select **Create Report**.

3. Downloading the Report:

- Exo Works will generate a report containing information about the All Exams.
- The report will be automatically downloaded to your device.

Report Contents: The exported report will contain the following details for each exam:

- Patient MRN (Medical Record Number)
- Patient Name
- Exam Type
- Performing Name
- Attending Name
- Accession Number
- Exam Date
- Attending Review Date
- Device Manufacturing Name
- Number of Images/Clips
- AE Title
- Specialty
- Account Number
- Order ID
- Exam Status
- Performing Signed Date
- QA Review Date
- QA Reviewer Name

Managing Exams as an Attending Provider



Managing Exams as an Attending Provider

Chapter 5

This chapter describes how to use Exo Works as an attending provider.

For general exam management, see [Managing Exams](#).

Reviewing exams

To review an exam

1. From the **Inbox** on the Exo Works home page, select an exam assigned to you.
2. Scroll to the bottom of the left column on the page, and click **Review**.
3. Review the exam images, clips, and worksheet.
4. When you are done with your review, click **Complete and Sign**. The exam is sent to PACS, and a report is sent to EMR.

Evaluating Exams as a QA Reviewer



Evaluating Exams as a QA Reviewer

Chapter 6

This chapter describes how to use Exo Works as a QA reviewer. The QA Reviewer is responsible for the quality assessment of ultrasound exams, which includes completing the QA worksheet and determining if the exam meets institutional quality standards and/or qualifies for credentialing credit. In addition to standard review tasks, QA Reviewers possess the capability to assign a Performer or Attending physician, designate the exam category (Clinical or Educational), and record their QA findings via a sign-off action.

For general exam management, see [Managing Exams](#).

Viewing exams sent for QA review

Viewing assigned QA review exams

As a QA reviewer, you can see all the exams waiting for QA review in your Inbox. Exams routed for QA review are not assigned to a particular QA reviewer; you will see all of them.


To view assigned QA review exams

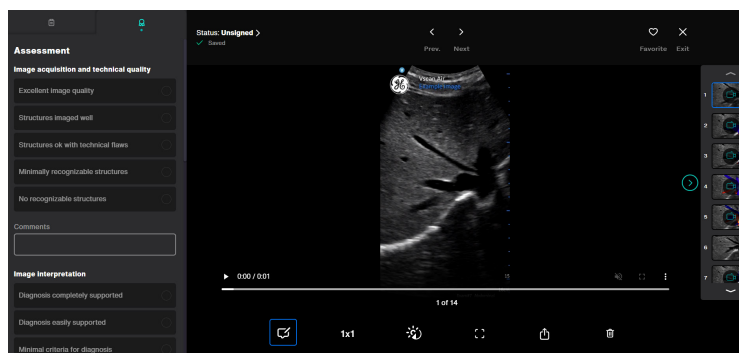
1. From the **Inbox** on the Exo Works home page, select an exam.
2. Review the exam's images, clips, and worksheet.
3. Complete the QA Assessment worksheet.

Completing the QA Assessment worksheet

You can use the QA assessment worksheet to review clinical exams.

To complete the QA Assessment worksheet

1. From the Inbox on the Exo Works home page, select an exam assigned to you.
2. Review the exam's images, clips, and worksheet.
3. From the Exam Review screen, select the QA Assessment  worksheet.



4. Complete each section of the QA worksheet (including any comments to help clarify your assessment, if needed).
5. At the bottom of the worksheet, select the **Credit earned** check box to give credit for the exam; however, if the exam needs to be sent back to the performing provider, leave the check box clear.
6. To route it back to the performing provider, select the **Flag for review** check box and click **Review**.

Note

You can give credit and flag for review at the same time. For example, the flag for review may be a suggestion to turn the brightness up or down.

Advanced QA Assessment Procedures

QA Worksheet Completion and Personnel Assignment

- The QA Reviewer can complete the QA worksheet at any point, either before or after a Performer or Attending physician has been assigned to the exam.

Exam Routing and Sign-off Workflow

- Upon assignment of a Performer, the system automatically routes the exam to the Performer for their electronic sign-off.
- Following the Performer's sign-off, the exam is then routed to the Attending physician for their final electronic review and sign-off.
- If only the Attending physician is assigned initially, the exam will be held in the Unassigned folder. The standard Performer → Attending review workflow will commence only after a Performer is subsequently assigned.

Clinical Worksheet Editability:

- The Clinical worksheet remains editable by both the assigned Performer and the Attending physician until the Attending physician has electronically signed the exam.
- Once the Attending physician has signed the exam, the Clinical worksheet transitions to a read-only status and can no longer be modified by the QA Reviewer, the Performer, the Attending, or any other user.

EMR/PACS Transmission:

- For Clinical exams, the electronic transmission of exam results to the EMR and associated images to PACS is triggered only after both the Performer and the Attending physician have affixed their electronic signatures.
- The QA Reviewer's electronic sign-off action does not initiate the delivery of exam data to the EMR or PACS.

Clinical/Educational Designation:

- The designation of an exam as either Clinical or Educational can be changed at any time until both the Performer and the Attending physician have signed the exam.
- Once both the Performer and Attending have signed, the Clinical/Educational designation is permanently locked.

Restrictions for QA Reviewers:

- QA Reviewers are not permitted to assign themselves as the Performer on any exam that they have performed a QA review on.

Credentialing Credit Eligibility:

- To be eligible for credentialing credit, an exam must have both a completed QA worksheet and an assigned Performer.

Note

Exams that lack either a completed QA worksheet or an assigned Performer do not meet the requirements for credentialing credit, even if the QA review process has been fully completed.

Managing Administrator Tasks



Managing Administrator Tasks

Chapter 7

Overview

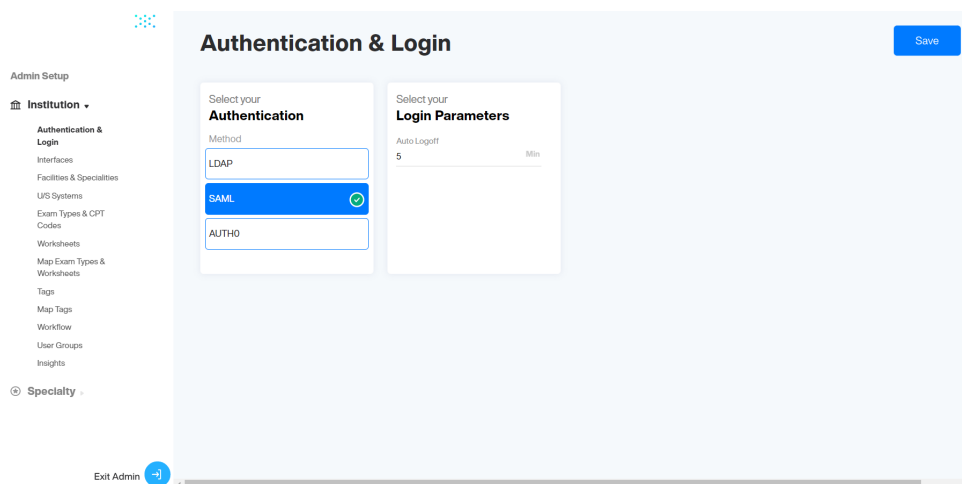
This chapter describes the parameters to setup Exo Works. The administrator tasks described in this section are only available to users with administrator, clinical administrator, and IT permissions.



The administrator setup is a dashboard to configure the Exo Works parameters for each facility/specialty, including users, modality, tags, exam types, billing codes, worksheets, and training.

Accessing the administrator setup options

To access the administrator setup options

1. From the Exo Works home screen, click your name/initials at the top right of the screen, and select **Admin**.
2. Click **Admin**. The Admin Setup screen displays.



- Most screens have these controls at the top.
- Click  to add a new item to the list.
- Click  to **edit** or **remove** an item.
 - ❖ To reactivate an item, click Enable.

Note

An item only gets removed if it's not dependent to an existing exam and if it doesn't have any dependencies. If either of these scenarios are present, the item is disabled instead of removed. Deleting an item permanently removes it from the system, compared to disabling an item, which only makes it unavailable.

Managing the institution

Configuring the authentication method and login

Make sure you first import the user files before configuring the authentication method and login. See [Importing a user into Exo Works](#) for more information.

The login credentials for each user are not maintained in Exo Works. User passwords are stored with the identity provider (SAML, ADFS_OAUTH2, or LDAP).

To configure the authentication method and login

- From the **Admin Setup** screen, click **Authentication & Login**

- Select your Authentication:** To change the authentication method for users to log in, click the appropriate radio button.
- Select your login Parameters:** To change the time setting for how many minutes an ultrasound devices are idle before being automatically logged out of Exo Works, type another number in the **Min** box (a maximum of 60), and click **Save Settings**.

Configuring the interfaces

You can configure the interface based on the selected authentication method at your institution. You can also configure Exo Link to push exams to PACS and EMR. The configuration settings are different for each method.

To configure any of the interfaces

- From the **Admin Setup** screen, select **Interfaces**.
- Make the updates, and click **Save**.

Configuring the ADFS_Oauth2 server

To configure the ADFS_Oauth2 server

1. Select the **ADFS_Oauth2 Servers** tab, and complete the following fields:
 - **Server name** - Type the name of the server; use only alphanumeric characters.
 - **Client ID** - Type alphanumeric characters only.
 - **Relying Party ID** - Type alphanumeric characters only.
2. Click **Save**.

Configuring Exo Link

To configure Exo Link

1. Select the **Exo Link** tab, and complete the following fields:
 - **DICOM IP Address** - Read only.
 - **DICOM Port** - Read only.
 - **HL7 Patient ID Type Code** - Type the MRN.
 - **Barcode/wristband Patient ID Type** - Type the MRN.
2. To test the connection, click **DICOM verify Exo Link**. If the connection fails, check that the information you entered is correct, and test it again.
3. Click **Save**.

Configuring the LDAP server

To configure the LDAP server

1. Select the **LDAP Servers** tab, and complete the following fields:
 - **Host name** - Type the host name.
 - **Port** - Optionally, type the port number.
 - **User Search base** - If multiple values are entered, separate them by a comma.
 - **Group search base** - If multiple values are entered, separate them by a comma.
 - **Service User DN** - Type the user domain name. If multiple values are entered, separate them by a comma.
 - **Service User password** - Type the user password.
 - **Transport Layer Security** - If you enable the transport layer security (TLS), the LDAP traffic between Exo Works and your LDAP directory is encrypted, and an SSL certificate field displays.
2. Click **Save**.

Configuring facilities and specialties

As the clinical administrator, you can create, edit, enable, and delete facilities within the institution. Make sure the facility names are unique. Each institution must have at least one facility. Within each facility, Exo Works automatically adds a list of common specialties. You can add or delete specialties for each facility.

Adding, editing, and deleting a facility

When you add a facility, the following list of specialties are assigned and enabled by default:


- Adult Critical Care (CCU)
- Adult Intensive Care (ICU)
- Anesthesia
- Emergency Medicine
- MSK
- Obstetrics
- Pediatric Critical Care (PCCU)
- Pediatric Intensive Care (PICU)
- Surgery

Note

You can disable default specialties.



Adding a facility

To add a facility

1. From the **Admin Setup** screen, select **Facilities & Specialties**.
2. Click the **Add**  icon to add a new facility to the list.
3. In the **Facility** box, type a unique name.
4. From the **Timezone** box, select the timezone of the facility.
5. Click **Save**. Exo Works saves the facility, and adds it to the Facilities list.



Editing a facility

To edit a facility

1. From the **Admin Setup** screen, select **Facilities & Specialties**.
2. From the list of facilities, select the one you want to edit.
3. Click the **Options**  icon, and then select edit.
4. Click the **Edit**  icon.
5. Make the desired changes, and click **Save**.

Deleting a facility

To delete a facility

1. From the **Admin Setup** screen, select **Facilities & Specialties**.
2. From the list of facilities, select the one you want to delete.
3. Click the **Options**  icon, and then select remove.
4. Click the **Trash**  icon and, when prompted, click **Confirm**.

Adding, editing, and deleting specialties


Only enabled facilities and specialties are available in Exo Works.

Caution

If you disable a specialty, the users assigned to that specialty are also disabled. To enable a user again, contact: exosupport@exo.inc.


Adding a specialty

To add a specialty

1. From the **Admin Setup** screen, select **Facilities & Specialties**.
2. From the list of facilities, select the one you would like to add a specialty to.
3. Click the **Add**  icon to add a new specialty to the list.
4. In the **Facility** box, type a unique name.
5. Click **Save**.



Editing a specialty

To edit a specialty

1. From the **Admin Setup** screen, select **Facilities & Specialties**.
2. From the list of specialties, select the one you want to edit.
3. Click the **Options**  icon, and then select edit.
4. Make the desired changes, and click **Save**.

Deleting a specialty

To delete a specialty

1. From the **Admin Setup** screen, select **Facilities & Specialties**.
2. From the list of specialties, select the one you want to delete.
3. Click the **Options**  icon, then select remove.
4. Click the **Trash**  icon next to the specialty and, when prompted, click **Confirm**.

Managing ultrasound devices

This section displays all the ultrasound device that are either manually configured or transferred from an exam.


The modality parameters are:

You can configure a modality by:

- Manually adding an ultrasound device
- Configuring an ultrasound device sent by an exam

Manually adding an ultrasound device

To manually add an ultrasound device

1. From the **Admin Setup** screen, select U/S Systems.
2. Click the **Add**  icon to add a new ultrasound device to the list.
3. Complete the following:
 - **U/S System AE Title** - Type a unique DICOM application entity title.
 - **Facility** - Type the facility the ultrasound device belongs to.
 - **Specialty** - Select the specialty the ultrasound system is used for.
 - **Exo Works Receives performing physician from** - Select the appropriate DICOM tag; this tag directs the performed exam to a physician's inbox. The tag must be in the format LASTNAME FIRSTNAME or userid.
4. Click **Save**.

Configuring an ultrasound device sent by an exam

Transferring an exam from a new modality creates a new entry; the device's AE Title is automatically populated on the U/S system page. If any other DICOM metadata is present (such as facility or specialty), the information is automatically populated into the new ultrasound device. If only the AE title is available in the DICOM metadata, the entry is highlighted in red in the U/S system page.

Note

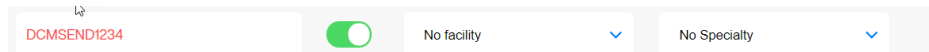
When editing an ultrasound device, you cannot change the AE title.

As the clinical administrator, you will receive an email notification that an exam was transferred into Exo Works without a facility/specialty assigned.

Sending an exam from the ultrasound device

To send an exam from the ultrasound device

1. From the **Admin Setup** screen, select **U/S Systems**.
2. From the email notification, find the AE title in the list.
3. Click the blue down arrow next to Facility, and select one from the list.



If the facility does not appear in the list, refer to the instructions in [Adding, editing, and deleting a facility](#).

4. Click the blue arrow next to Specialty, and select one from the list.



Note

When deleting a modality from the list, all the exams related to it remain in Exo Works in their specific folders.

5. Click **Save**.



Editing an ultrasound device

To edit an ultrasound device

1. From the **Admin Setup** screen, select **U/S Systems**.
2. Click the **Options**  icon, and then select edit.
3. Click the Edit  icon.
4. Make the desired changes, and click **Save**.



Disabling an ultrasound device

To disable an ultrasound device

1. From the **Admin Setup** screen, select **U/S Systems**.
2. Click the **Options**  icon, and then select edit.
3. Click the Edit  icon.
4. Click **Enable** to toggle it off, and click **Save**.

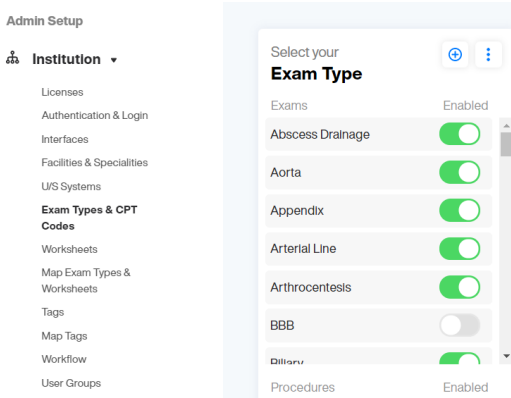
Deleting an ultrasound device

To delete an ultrasound device

1. From the **Admin Setup** screen, select **U/S Systems**.
2. Click the **Options**  icon, then select remove.
3. Click the **Trash**  icon.
4. Make the desired changes, and click **Save**.

Managing exam types, procedures, and CPT codes

As the clinical administrator, you can create, edit, enable, and delete exam types, procedures, and associated CPT codes. Ensure each exam type and procedure has a unique name.



Note

Enabled exam types are the only ones available to Exo Works users.


Adding an exam type or procedure

Note

You cannot delete an exam type if there is an exam associated with it or any CPT code assigned to it. Instead, Exo Works disables the exam type.



Important: An Exam Type cannot be deleted if there is an exam associated with it or any CPT code assigned to it.

To add an exam type or procedure

1. From the **Admin Setup** screen, select **Exam Types & CPT codes**.
2. Click the **Add**  icon to add a new exam type to the list.
3. In the **Exam Type** box, type a unique name.
4. Optionally, in the **Abbreviation** box, type an abbreviation for the exam code.
5. In the **Category** box, select **Exam** or **Procedure**.
6. Click **Save**. Exo Works saves the exam type, and adds it to the Exams list.
7. To associate certain CPT codes with the new exam type, select the exam type you just added, and click to see the list of codes; click **Enable** one or more codes link the appropriate CPT code with the exam or procedure type.



Editing an exam type or procedure

To edit an exam type or procedure

1. From the **Admin Setup** screen, select **Exam Types & CPT codes**.
2. From the list of exams, select the one you want to edit.
3. Click the **Options**  icon, and then select **edit**.
4. Click the **Edit**  icon.
5. Make the desired changes, and click **Save**.



Deleting an exam type or procedure

To delete an exam type or procedure

1. From the **Admin Setup** screen, select **Exam Types & CPT codes**.
2. From the list of exams, select the one you want to delete.
3. Click the **Options**  icon, and then select **remove**.
4. Click the **Trash**  icon.

Disabling an exam type or procedure

To disable an exam type or procedure

1. From the **Admin Setup** screen, select **Exam Types & CPT codes**.
2. Click the **Options**  icon, and then select **edit**.
3. Click the **Edit**  icon.
4. Click **Enable** to toggle it off, and click **Save**.

Managing CPT codes

The American Medical Association (AMA) has a standardized list of Current Procedural Terminology (CPT) codes and modifiers that Exo Works uses for billing medical diagnostic services and procedures. The CPT code enabled for a specific exam type is automatically displayed in the worksheet for a clinical exam.

As a clinical administrator, Exo Works lets you add, edit, delete, and modify the codes of the standardized list to suit the institution.

Select an exam type to display the list of CPT codes.

Exam Types & CPT Codes

Select your **Exam Type**

Exams Enabled

- Abdomen ☒
- Aorta** ☒
- Appendix ☒
- Biliary ☒
- Bladder ☒
- Bladder-GER ☒

Procedures Enabled

- Abscess Drainage ☒
- Arterial Line ☒
- Arthrocentesis ☒
- Central Venous Line ☒
- Foreign Body Removal ☒
- Nerve Block ☒

Enable All ☐


Select your **CPT Codes**

CPT Code Enable

- Paracentesis 49083 ☐
- Ophthalmic 76512 ☐
- Ocular FB localization 76529 ☐
- Soft tissue - head, neck 76538 ☐
- Limited chest 76604 ☐
- Limited abdominal 76705 ☐
- Limited retroperitoneal 76775 ☒
- Limited transabdominal (TA) pregnant uterus 76815 ☐
- Limited transvaginal (TV) pregnant uterus 76917 ☐
- Limited transvaginal (TV) female pelvic 76930 ☐



ADDING A CPT CODE

To add a CPT code

1. From the **Admin Setup** screen, select **Exam Types & CPT codes**.
2. Select an exam type or procedure.
3. From the list of CPT codes, click the **Add**  icon to add a new CPT code to the list.
4. In the **CPT code** box, type the new code.
5. Optionally, in the **Description** box, type a short description for the CPT code.
6. Click **Save**. Exo Works saves the CPT code, and adds it to the CPT code list.



EDITING A CPT CODE

To edit a CPT code

1. From the **Admin Setup** screen, select **Exam Types & CPT codes**.
2. Select an exam type or procedure.
3. From the **CPT Codes** list, click the **Options**  icon, and then select **edit**.
4. Click the **Edit**  icon next to the code you want to change.
5. Make the desired changes, and click **Save**.



DELETING A CPT CODE

To delete a CPT code

1. From the **Admin Setup** screen, select **Exam Types & CPT codes**.
2. Select an exam type or procedure.
3. From the **CPT Codes** list, click the **Options**  icon, and then select **remove**.
4. Click the **Trash**  icon next to the code you would like to delete.

DISABLING A CPT CODE

To disable a CPT code

1. From the **Admin Setup** screen, select **Exam Types & CPT codes**.
2. Select an exam type or procedure.
3. Click the **Options**  icon, and then select edit.
4. Click the **Edit**  icon.
5. Click **Enable** to toggle it off, and click **Save**.

Viewing worksheets

Exo Works provides worksheets for all exam types. To create or edit a worksheet, contact exosupport@exo.inc.

Mapping exam types and worksheets

As the clinical administrator, you can associate an exam type to a specific worksheet. Only one worksheet can be associated to an exam type or procedure.

To map an exam type to a worksheet


1. From the **Admin Setup** screen, select **Map Exam Types and Worksheets**.
2. From the list of Facilities, select a facility.
3. From the list of specialties, select a specialty.
4. From the list of exam types, select an exam type or procedure.
5. If the exam type or procedure is not enabled, click **Enabled** to toggle it on.
6. From the list of worksheets, select a worksheet to be associated with the exam type or procedure.
7. Click **Save**.

Managing tags

The Clinical Admin can create, edit, and delete tags for the institution. You can also map tags to a facility.

Adding a tag

To add a tag

1. From the **Admin Setup** screen, select **Tags**.
2. In the **Enter Tag** box, type a unique tag.
3. Click the **Add**  icon to add the tag to the list.

Editing a tag

To edit a tag

1. From the **Admin Setup** screen, select **Tags**.
2. From the list of tags, select the tag name you want to edit.
3. Make the appropriate changes, and click **Save Edit**.

Deleting a tag

To delete a tag

1. From the **Admin Setup** screen, select **Tags**.
2. From the list of tags, select the tag you want to delete, and click **Delete Tag**.

Mapping tags to a facility and specialty

You can assign tags to a facility and specialty.

To map a tag to a facility and specialty

1. From the **Admin Setup** screen, select **Map Tags**.
2. From the list of facilities, select the one to map the tag to.
3. From the list of specialties, select one.
4. From the list of tags, click **Enabled** to toggle on the tags you'd like to map.

Configuring workflows

You can configure the workflow type for each specialty within a facility.

To configure the workflow

1. From the **Admin Setup** screen, select **Workflow**.
2. From the list of facilities, select the one.
3. From the list of specialties, select one.
4. Select from one of the following:
 - **Encounter Based** - Exo Works queries the EMR to request the order.
 - **Order Based** - The provider places an order for the exam.
5. Click **Save Settings**.

Managing user groups

Every user is assigned to a specific user group that defines the actions that the user can and cannot perform.


Exo Works comes with the following predefined user groups:

- IT
- Clinical admin
- QA reviewer
- Attending
- Student
- Resident
- Fellow
- PA
- NP
- Nurse
- Guest

Adding a new user group

Contact exosupport@exo.inc to configure the permissions and access rights for new user groups.

To add a new user group

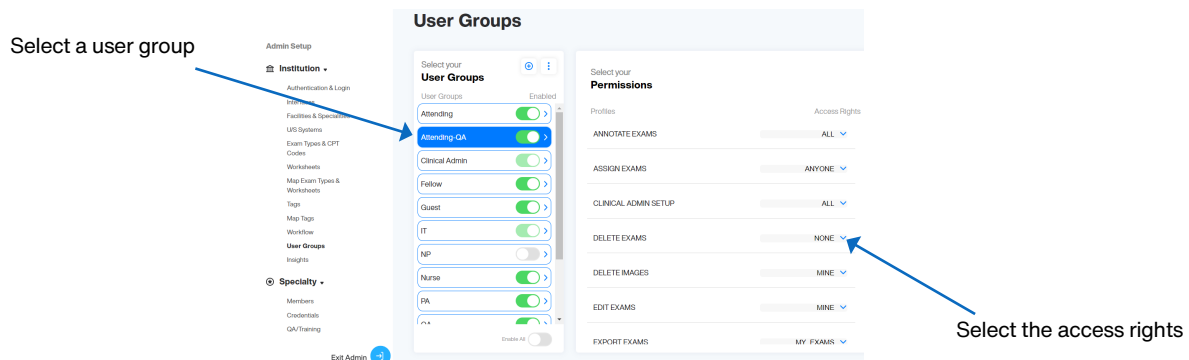
1. From the **Admin Setup** screen, select **User Groups**.
2. From the list of user groups, click the **Add**  icon to add a new user group to the list.
3. In the **User Group** box, type a unique name, and click **Save**. Exo Works saves the user group, and adds it to the user group list.

Configuring the permissions for a user group

To configure the permissions for a user group

1. From the **Admin Setup** screen, select **User Groups**.
2. From the list of user groups, select the user group you'd like to configure; the permissions display in the Permissions box.

Select a user group



Select the access rights

- From the **Permissions** box, click to select the access rights for each permission. Changes are automatically updated in Exo Works.

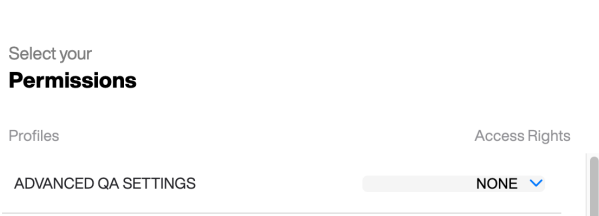
Refer to the following table to see the permission descriptions and access rights.

Permission	Description
View exam	The ability to access and view exams within a user's facility and specialty, including viewing images/clips, patient data, tags, and exam worksheets. Access right levels: All exams and only my exams
Edit exams	The ability to edit exams, including editing patient data, exam data, and exam worksheets. This action cannot be done if an exam has been archived. Access right levels: Only mine (Only exams assigned to myself.)
Assign exams	The ability to assign the performing provider to an unassigned exam. Access right levels: All users and only to myself
Delete exams	The ability to delete exams from the Exam list (any folder). The exam will be deleted from the Exo Works app but will remain stored in the system database. This action cannot be done if an exam is signed, clinically indicated, or archived. Access right levels: All exams and only my exams
Delete images	The ability to delete images/clips from a specific exam. The images/clips will be deleted from the Exo Works app but will remain stored in the system database. This action can only be performed if the performing provider hasn't signed the exam. Access right levels: All exams and only my exams
Annotate exams	The ability to add annotations on an image or clip. Access right levels: All exams and only my exams
Tag exams	The ability to add tags to a specific exam. Access right levels: All exams and only my exams
View QA assessment	The ability to view an exam's QA Worksheet section. Access right levels: All exams and only my exams
View insights	The ability to access and view the Insights screen. Access right levels: All users insights and only my insights
Manually transfer exams	The ability to manually perform the push to PACS and EMR. Access right levels: All exams and only my exams
Perform exams	The ability to be assigned as a performing provider to an exam. Be sure to give them, at a minimum, view, edit, and assign exam permissions. Access right levels: Only exams I'm assigned
Interpret exams	The ability to review and sign an exam as interpreted, such as signing as the exam's attending. A provider with this permission also needs to be credentialed for the exam's exam type Levels (only one): Only exams I'm assigned
QA review	The ability to review, complete, and sign the QA worksheet. Levels (only one): All exams

Permission	Description
Advanced QA settings	The ability to complete the QA worksheet at any point, either before or after a performing or attending provider has been assigned to the exam. Levels (only one): All exams
Clinical admin setup	The ability to access admin setup and configure the parameters. No levels.
Import users CSV	The ability to upload a CSV file with the organization's users. No levels.
Export users CSV	The ability to download a CSV file with the organization's users. No levels.

Configuring advanced QA permissions for a user group

1. From the **Admin Setup** screen, select **User Groups**.
2. From the list of user groups, select the user group you'd like to configure; the permissions display in the Permissions box.
3. From the **Permissions** box, change **ADVANCED QA SETTINGS** from **NONE** to **ALL**. Changes are automatically updated in Exo Works.





Caution

The Advanced QA Setting should only be enabled for **Clinical Admins**, **QA Reviewers**, and **QA Attending** users.

Editing the name of a user group

To edit the name of a user group

1. From the Admin Setup screen, select User Groups.
2. Click the **Options**  icon, and select **edit**.
3. Click the **Edit**  icon next to the user group you want to edit.
4. Make the desired changes, and click **Save**.

Editing the name of a user group

Note

The IT and clinical admin user groups cannot be disabled.

DISABLING A USER GROUP

To disable a user group

1. From the **Admin Setup** screen, select **User Groups**.
2. Next to the user group you want to disable, click **Enabled** to toggle it off.

ENABLING A USER GROUP

To enable a user group



1. From the **Admin Setup** screen, select **User Groups**.
2. Next to the user group you want to enable, click **Enabled** to toggle it off.

DELETING A USER GROUP

Note

The IT and clinical admin user groups cannot be disabled.

To delete a user group

1. From the **Admin Setup** screen, select **User Groups**.
2. Click the **Options**  icon, and select **remove**.
3. Click the **Trash**  icon next to the user group you want to delete.
4. When prompted, click **Confirm**.

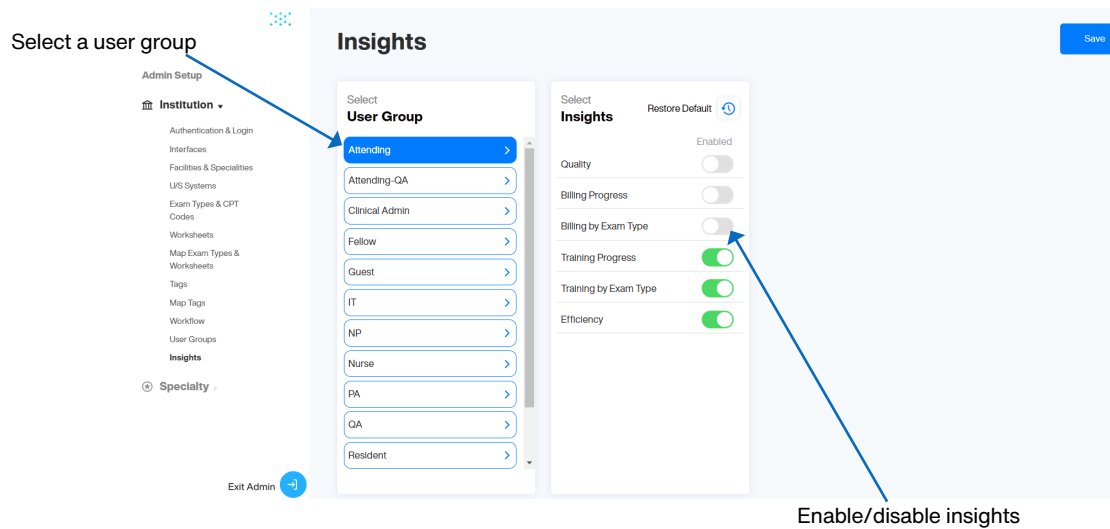
Managing insights

Each user group has their own set of default insights. As a clinical administrator, you can enable or disable the insights for each user group in the organization.

Changing the insights for a user group

To change the insights for a user group

1. From the **Admin Setup** screen, select **Insights**.



2. From the **User Group** box, click to select the user group you'd like to change.
3. From the **Insights** box, enable or disable the insights for that group.
4. If desired, click the **Restore Default** icon to return to the system defaults for that user group.
5. Click **Save**.

Managing specialties

Managing users

As the clinical administrator, you can download the CSV template, import and download the CSV files, and configure the user groups and users for each facility and specialty.

When importing the CSV to add a new user to Exo Works, a welcome email is automatically sent to each user on the list. Users are sent a link with the organization code so they can complete the web registration.

Caution

You can assign a user to one user group and one specialty within a facility. If you assign a user to more than one user group, the user is removed from the first user group and added to the new one.

Importing a user into Exo Works

Here are some important guidelines for completing the CSV file:

- Attributes names are case sensitive
- Order doesn't matter
- Separate fields by a comma
- Email is used as a unique identifier
- Custom user groups are not allowed
- Complete the mandatory fields (logon name, email, facility, and specialty)

To import a user into Exo Works

1. From the **Admin Setup** screen, select **Members**.
2. Click **Download CSV Template**. This template provides instructions on how to complete the CSV file.
3. Complete and save the CSV file.
4. To import the CSV file, click **Import CSV**.

Editing a user's CSV file

To edit a user's CSV file

1. From the **Admin Setup** screen, select **Members**.
2. Click **Download CSV**. The **users_import_template** file is downloaded to the Download folder.
3. Edit and save the file.
4. To import the updated CSV file, click **Import CSV**.

Reviewing a user group and associated users

To review a user group and associated users

1. From the **Admin Setup** screen, select **Members**.
2. From the list of facilities, select a facility.
3. From the list of specialties, select a specialty.
4. From the list of user groups select the one you want to review.

Note

You can enable/disable a user group from the list of user groups.

5. View the list of users. If desired, you can view the list of enabled users by selecting Show Enabled.

Note

You cannot enable/disable a user from the list of users; instead, modify the user in the CSV file.

6. If desired, you can search for a user by first name, last name, or user ID.

Assigning credentials to a user

As the clinical administrator, you can assign each user to the exam types they are credentialed for. A credentialed user can sign off on an exam without an additional signature.

To assign the credentials to a user

1. From the **Admin Setup** screen, select **Credentials**.
2. From the list of facilities, select a facility.
3. From the list of specialties, select a specialty.
4. From the list of user groups, select a user group. The list of users belonging to that group displays.
5. From the list of users, select a user. If desired, you can search for a user by first name, last name, or user ID.
6. From the list of credentials, click to enable the applicable credentials for the selected user.
7. To show all the user's enabled credentials, select **Show Enabled**; to enable all the user's credentials, select **Enable All**.

Managing QA and training

As the clinical administrator, you can assign the percentage of exams to go through QA per user group. In addition, you can set the number of exams required for training by exam type.

Configuring the percentage of exams to go through QA for each user group

To configure the percentage of exams to go through QA for each user group

1. From the **Admin Setup** screen, select **QA/Training**.
2. From the list of facilities, select a facility.
3. From the list of specialties, select a specialty.
4. From the list of user groups, select a user group.
5. From the **% per QA** list, select the percentage from the predefined list.

Default percentage for user groups (if not zero)

User Group	Default percentage for QA
Student	100
Resident	100
Fellow	50
Attending	10
PA	10

Configuring the training for each user group

To configure the training for each user group

1. From the **Admin Setup** screen, select **QA/Training**.
2. From the list of facilities, select a facility.
3. From the list of specialties, select a specialty.
4. From the list of user groups, select a user group. For reference, the list of users belonging to that group displays. If desired, you can search for a user by first name, last name, or user ID.
5. From the list of exam types, type the number of exams required for training. This number is applied to the entire user group.
6. Click **Save Settings**.

Apple iOS Mobile App



Apple iOS Mobile App

Chapter 8

Introduction

Exo Works is accessible from a web browser or Apple iOS mobile app. This chapter contains the details specific to the mobile app. The remaining chapters in this manual pertain to the web, which has more functionality, such as workflow, administration, insights, and QA functions.

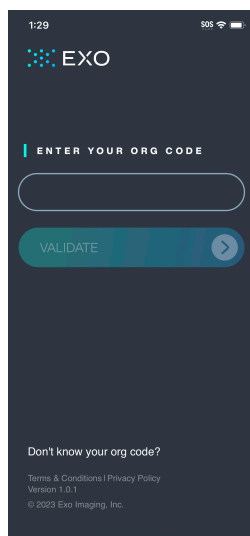
Onboarding

As a new user, you will receive a welcome email from the clinical administrator to sign into Exo Works.

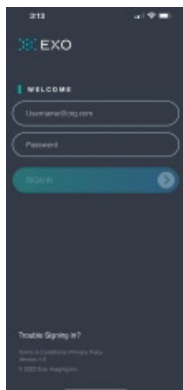
Signing in for the first time

To sign in for the first time

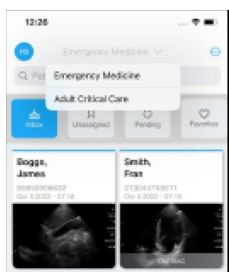
1. From the Apple App Store on your mobile device, search for and download the Exo Works application.
2. Open the application from your phone.
3. Type the org code (first time only), and tap **Validate**.



4. In the **username@org.com** box, type the login ID you use at your facility.



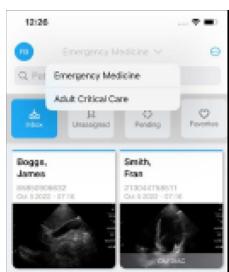
5. In the **Password** box, type the password you use at your facility.
6. Tap **Sign In**. Exo Works opens, displaying your Inbox.
7. Optionally, if you are assigned to more than one specialty, select the specialty from the pop-up window to perform and view exams for that specialty. You can change to another specialty from the Home page; see [Changing specialties](#) for more information.



Signing in and out

To sign in

1. In the **username@org.com** box, type the login ID you use at your facility.
2. In the **Password** box, type the password you use at your facility.
3. Tap **Sign In**. Exo Works opens, displaying your Inbox.
4. Optionally, if you are assigned to more than one specialty, select the specialty from the pop-up window to perform and view exams for that specialty. You can change to another specialty from the Home page; see [Changing specialties](#) for more information.

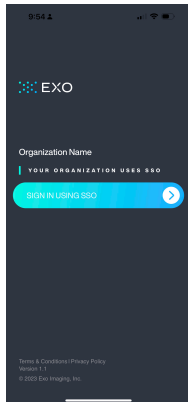


Signing in with SSO

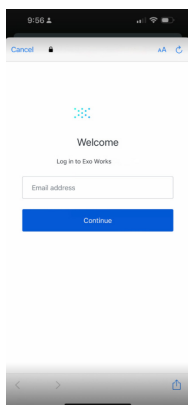
If you are automatically signed out of the Exo Works application, you are redirected to the single sign-on (SSO) screen. SSO combines several different application login screens into one. With SSO, you only have to enter your login credentials one time to access all of your software as a service (SaaS) applications.

To sign in with SSO

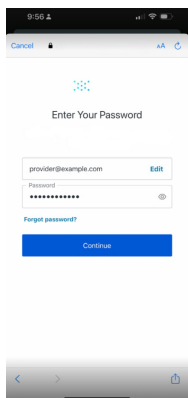
1. When you are redirected to the Exo Works screen, tap the blue arrow.



2. From the Welcome screen, type your email address, and tap **Continue**.



3. From the Enter Your Password screen, type the login ID you use at your facility; then type the password you use at your facility.



4. Tap **Continue**. The Exo Works home page displays.

Note

If you have multiple specialties, Exo Works prompts you to pick a specialty before you are redirected to the home page.

Signing out

To sign out

- ❖ From the Home page, tap the blue circle with your initials in the top left of the screen, then tap **Sign Out**.



Managing exams

You can easily access your exams from the Home page.

- ❖ To see a list of your assigned exams, tap **Inbox**.

Viewing exams

- **Inbox** - These are the exams assigned to you.
- **Unassigned** - These are the exams that are not assigned. If an exam is not in your Inbox, look for it in the Unassigned tab, and assign it to yourself.
- **Pending** - These are the exams waiting for an attending and/or a QA review.
- **Favorites** - These are the exams you added as favorites.
- **Archived** - These are the exams that have been signed off, completing the documentation process.
- **Billed** - These are the completed exams where the exams with CPT codes were sent to EMR for billing.

Exam details

Each exam lists patient name, MRN and date and time of exam and the exam type.

Exam Pending Status and Clarification Indicator

In the Exam Card View, List View and Detailed Exam View, the Pending status is accompanied by a clarifying indicator. Hovering over this indicator provides details regarding why the exam is in a pending status.

Explore the list below for different Pending statuses:

Use Case	Exam Card/List View Hover State Text	Exam Detail Error Text
Exam missing order	Missing Order	Missing: Exam requires an order
Exam pending Attending sign off	Pending Attending Sign Off	Exam pending Attending signoff
Exam does not have an order request and is therefore stuck in pending	Pending Order Request	Exam pending order request
Exam order was matched, but the order results were not sent back to Exo Link from Exo Works.	Pending Order Results	Exam pending order results
Exam did not transfer to PACS but results may have been sent to EMR	Pending transfer to PACS	Exam pending transfer to PACS
The attending or performing individual does not have an associated NPI.	Pending NPI	Missing: NPI required
Exam is pending QA Review	Pending QA Review	Exam pending QA review
No known reason for exam stuck in pending	Pending Exam Error: Contact Support	Pending Exam Error: Contact Support

Searching for an exam

A search bar is located at the top of the Home page. Search for exams based on the following alphanumeric search information:

- **Exam date**—For example, =4 displays all the exams transferred to Exo Works in the past four days.
- **Patient name**
- **Medical record number (MRN)**
- **Provider name**
- **Exam category**—For example, a clinical versus an educational exam.
- **Exam type**—For example, a renal or cardiac exam type.
- **Accession #**

To search for an exam

1. Type the first two letters or numbers of the search criteria. For example, type be to search for a provider with the last name of Bennett. A list of possible matches displays.
2. Select from the displayed list, or continue typing to narrow the list down.
3. To add additional search criteria, select to the right of the already entered search criteria. Enter the first two letters or numbers to view possible matches or continue entering data to further narrow down the list.
4. The exams displayed are updated as the search criteria is entered.

Changing specialties

If you are a multi-specialty provider, you can change to another specialty from the Home page.

To change specialties

- ❖ From the Home page, tap the down arrow next to the current specialty, and select a different one to view those exams.


Opening an exam

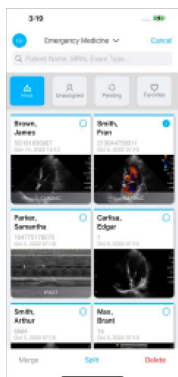
To open an exam

- ❖ Select the desired tab, and tap the exam you want to open. The exam opens in the Exam Summary screen.

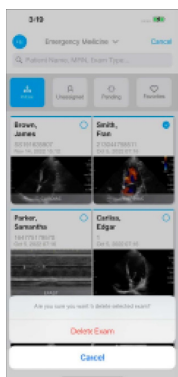
Deleting an exam

To delete an exam

1. From the Home page, tap the **Inbox** tab.
2. Tap the **Options**  icon, and tap to select the exam(s) you'd like to delete.
3. Tap Delete.



4. Tap **Delete Exam**.

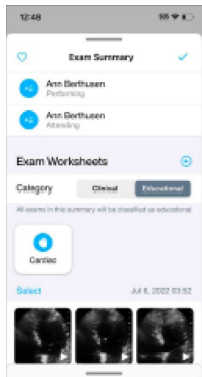


5. At the prompt, tap **Confirm**.

Reviewing an exam

Selecting an exam opens the exam in the Exam Summary screen.

Exam Summary screen



From the Exam Summary screen, you can:

- View the exam's images and video clips.
- Complete or review the exam worksheet.

Note

- The patient/exam information that displays is dependent on availability. For example, there may not be a patient name listed on the exam card if the information was not entered on the ultrasound system.
- Access and visibility to features in the Exam Summary screen are dependent on your permission levels set by the clinical administrator.

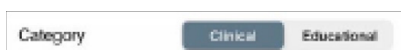
Selecting an exam category

Ultrasound exams can be either for clinical or educational purposes.

- Clinical exams have billing codes (CPT) or billable procedures associated with them, and the exam results are sent to the EMR (if the EMR is configured for it).
- Educational exams are not billed and are kept in Exo Works for training purposes.

To select an exam category

- ❖ To change an exam category, tap the appropriate category.



Assigning and unassigning an exam

You can only assign an unassigned exam to yourself.

Assigning an exam to yourself

If you are a performing provider, you can assign an exam to yourself.

To assign an exam to yourself

1. From the **Unassigned** tab, tap the exam you want to assign to yourself.
2. Tap **Select User**, and tap **Confirm**.
Your name now appears as the performing and is added to your inbox.
3. Complete the exam now or later.

Unassigning yourself from an exam

If you are a performing provider and haven't yet signed an exam, you can unassign yourself. You will lose anything you've completed on the worksheet.

To unassign yourself from an exam

1. From the **Inbox** tab, tap the exam you'd like to unassign.
2. Tap your name as the performing, then tap **Unassign**. The exam moves to the **Unassigned** folder

Changing a patient and patient information

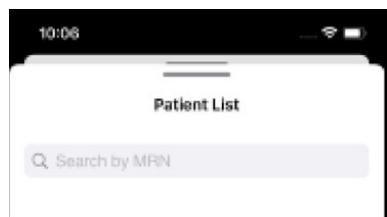
Before changing exam and patient data, the performing provider must be assigned to the exam.

Changing a patient

You can only change to another patient if the exam is encounter-based.

To change a patient

- ❖ Tap to open a patient exam, and search for another patient.



Changing patient information

You can only change patient information if it's an order-based workflow.

To change patient information

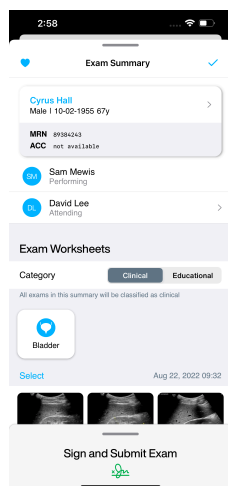
1. From the Exam Summary screen, tap the right arrow in the patient name box. A list of patient names displays.
2. Search for the correct patient.
3. Tap the correct patient.
4. At the prompt, tap **Select**.

Adding a favorite exam

You can mark an exam as a favorite, and Exo Works will add it to the Favorites folder.

To add a favorite exam

- ❖ Select the **Favorite** icon to add an exam to the Favorites folder



Viewing favorite exams

To view favorite exams

- ❖ From the Exo Works section, select the Favorites folder. A list of all the exams selected as favorites is available to view.

Documenting an exam

The exam worksheet automatically displays after you select the associated exam type. Use the worksheet to document the exam results. Typically, the worksheet is divided into several sections: indications, views, findings, and interpretation.

Selecting an exam worksheet

Exam worksheets are associated with exam types.

To select an exam worksheet

- ❖ To display a list of exam worksheets, tap **Add Worksheet**, and select an exam type from the list.


Selecting multiple worksheets

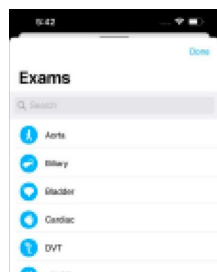
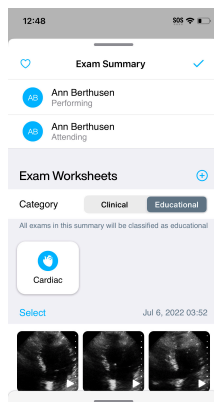
You can add one or more anatomical worksheets for a selected exam. The multiple worksheet option is only available for educational exams.

Note

- Complete the mandatory fields of each worksheet before signing.
- Tap **Sign** and **Submit Exam** to view the summary of the exam results and sign off.

To select more than one worksheet


1. Tap **Educational** to change the exam category.
2. Tap the  icon, and select the worksheets related to the exam.



3. If desired, select additional exam types.
4. Complete the worksheets.


Deleting a worksheet

To delete a worksheet

1. From the **Exam Summary** screen, tap the worksheet you want to delete.
2. Tap the **Options**  icon, and tap **Delete Worksheet**.
3. At the prompt, tap **Delete**.

Clearing a worksheet

To clear a worksheet

1. From the **Exam Summary** screen, tap the worksheet you want to clear.
2. Tap the **Options**  icon, and tap **Clear Worksheet**.
3. At the prompt, tap **Delete**.

Marking an exam as unremarkable

You can mark an exam as unremarkable. This option automatically populates some sections of the worksheet with predefined selections.

1. From the bottom of the Exam Summary screen, swipe up where it says **Sign and Submit Exam**.
2. Tap to select the check box next to the patient name.
3. To sign, swipe the **Slide to Sign** slider from left to right. The screen shows that the exam has been signed.
4. Do one of the following:
 - To move to the next exam, tap **Next Exam**.
 - To go back to the Home page, tap **Back to Inbox**.

Managing images and clips


Reviewing exam images

To review exam images

1. Tap to open an exam.
2. Scroll through the image thumbnails on the bottom of the screen.
3. Tap to select any image thumbnail to make it the active image on the screen.


Deleting an image

To delete an image

1. Tap the image you want to delete.
2. Tap the **Trash**  icon, then tap **Delete**.

Playing/pausing a clip

To play a clip

1. By default, a clip automatically plays when you open it; to pause it, tap the **Pause**  icon.
2. To view the clip at half speed, tap the **Clock** icon.


Splitting and merging exams

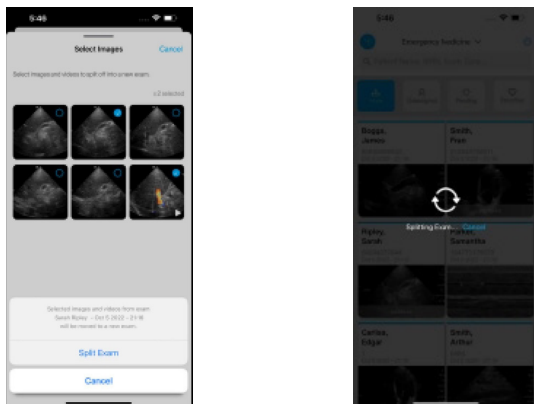
You can split and merge exams in the mobile app.

Splitting exams

You can move one or more images and clips from one exam to a new exam. You can split an exam only if it is assigned to you and not yet signed.

To split images to a new exam

1. From the Home page, tap the **Inbox** tab.
2. Tap the **Options**  icon, and tap to select the exam you'd like to split into a new exam.
3. Tap **Split**. Tap to select the images you'd like to move to the new exam.
4. Tap **Split Exam**.
5. At the prompt, tap **Split Exam**. To cancel the split, tap **Cancel** within five seconds. Exo Works creates a new exam for an unknown patient with the images/clips you choose.




6. Once the split is complete, assign a patient to the new exam. The old exam stays in the Inbox, less the images moved to the new exam.

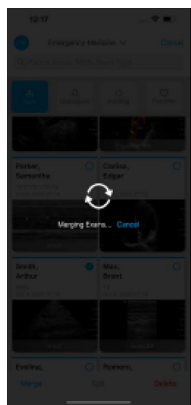
Merging exams

You can merge two exams that are in your inbox. They must have the same patient's MRN on both exams, and must not be signed. You cannot merge more than two exams at a time. The images/clips from the child exam will be merged into the parent exam. After the merge is complete, only the parent exam will remain, and the child exam will be deleted.

To merge two exams

1. From the Home page, tap the **Inbox** tab.
2. Tap the **Options**  icon, and tap to select the two exams with the same MRN you'd like to merge into one exam.
3. Tap **Merge**.
4. Select the primary exam, then tap **Merge Exams**.

- At the prompt, tap **Merge Exams**. All the images are saved to the primary exam, and the other exam is deleted.



More information about Exo

You can find Exo support and contact information in Getting help.

For more information about Exo

- Tap the blue circle with your initials in the top left of the screen, then tap About Exo.
- Choose from the following:
 - Who We Are** - Takes you to the Exo website where you can sign up for a demo.
 - Terms of Use** - Takes you to the Exo terms and conditions of use agreement.
 - Exo and Your Privacy** - Takes you to the Exo privacy policy.

Glossary



Glossary

Chapter 9

Terms

Attending	A physician who has completed residency and practices medicine in a clinic or hospital.
Clinical administrator	A person who is responsible for a medical organization's upkeep, configuration, and reliable operation of computer systems and servers.
CPT code	Current procedural terminology (CPT) is a medical code set that is used to report medical, surgical, and diagnostic procedures and services to entities such as physicians, health insurance companies, and accreditation organizations.
Credentialed provider	A provider that attained certification through an ultrasound accreditation program. Providers with credentialed rights are entitled to complete a worksheet, sign it, and send the associated report to EMR.
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.
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.
Performing provider	A provider who performs the exam on the patient.
Quality Assurance (QA)	The process by which uncredentialed providers get their ultrasound examinations and findings reviewed by a QA reviewer and get feedback.
QA reviewer	A provider with QA permission. Providers with QA permission review the findings of uncredentialed providers enrolled in an ultrasound accreditation program. Their agreements to uncredentialed clinicians' findings count for the required program passing scores.
Uncredentialed provider	A provider that didn't attain certification through an ultrasound accreditation program. Providers 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

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



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