



**Clario
Smart Worklist &
Smart Reporting**

Radiologist
Proficiency
Series

Clario Smart Worklist & Smart Reporting

**Training Packet for
Radiologists**

TRAINING PLAN APPROVAL			
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This training packet will provide generic information on how a radiologist can utilize the Clario Smart Worklist and Smart Reporting.

All patient data shown in this training packet is fake patient data within our demo system. This document does not contain any PHI.

Table of Contents

Clario Smart Worklist Radiologist Training Checklist	5
Explanation of the zvectender:	7
How to select a shift:	9
My Reading Queue and how to manage:	10
How to navigate the worklist page:	12
How to customize the worklist page:	15
How to create your own worklist:	16
How to read your productivity gauges:	18
How to manually input RVU and WU credits	20
How to use the “Away” button	21
Profile Management:	22
User Settings and History Indicators:	28
Contact Management:	30
Password Management:	31
How to use the assignment column and manage your assignments:	32
How to read an exam:	34
How to use auto next:	35
How to combine or read reports consecutively:	41
Explanation of patient view:	44
How to use collaboration:	46
How to use the resident and attending workflow	48
Notes workflow:	54
Folder workflow:	60
Notifications and Alerts:	65
Messaging	66
Clario Smart Reporting Radiologist Training Checklist	67

How to manage your microphone	69
Smart Reporting specific user preferences	70
Smart Reporting Speech Commands	71
How to use different template structure levels	73
How to use transcription mode	75
Accessing Transcription Worklists	76
Signing Worklists	76

Clario Smart Worklist

This portion of the training packet will cover the Clario Smart Worklist functionality. All patient data shown in this training packet is fake patient data within our demo system.

Clario Smart Worklist Radiologist Training Checklist

Scope:

This document provides a generalized guideline of basic radiologist training. You can copy these pages and utilize them as a training checklist for your radiologists.

Items to Review

1. Logging In

- a. How to Log In to Clario
- b. Explanation of LDAP and all services that will be launched by Clario
- c. Selecting Worklist Module to read
- d. Explanation of zVextender
- e. How to reinitialize zVextender
- f. Selecting Shift
- g. Identifying MRQ (My Reading Queue) is correct

2. Overview of Worklist Page (Starting in upper left, explanation of page layout)

- a. MRQ and worklist tree
- b. History
- c. Quick Search
- d. Advanced Search
- e. How to create a worklist
- f. Worklist

3. Setting Up Worklist Page for Optimal Reading Preferences

- a. Expand and collapse Advanced Search
- b. Expand and minimize history box, worklist box, etc.
- c. Drag and drop columns
- d. Expand and collapse columns
- e. Add/ Remove Columns
- f. Profile Management
 - i. Page Layout
 - ii. Theme
 - iii. Sounds: Alerts, Chat, etc.

- iv. Read Consecutively/ Combined Reports
- v. Filter MRQ
- vi. How to create a new Profile
- g. User Settings and History Indicators
- h. Contact Information
- i. How to save settings (Log Out, do not hit red X when done)

4. How to Read an Exam

- a. Manage MRQ
- b. Changing Shifts
- c. Explanation of Columns
 - i. Actions
 - ii. Assignment
 - iii. Indicators
- d. Launching to read an exam
 - i. Double Click or Read Icon
 - ii. Explanation of Single Click
- e. Auto Next
 - i. Starting
 - ii. Stopping
 - iii. Pausing
 - iv. Skipping
 - v. Next Exam

5. Patient View (Starting in upper left, explanation of page layout)

- a. Patient Information
- b. Order Information
- c. Notes
- d. Ordering/ Site Information
- e. Priors Table

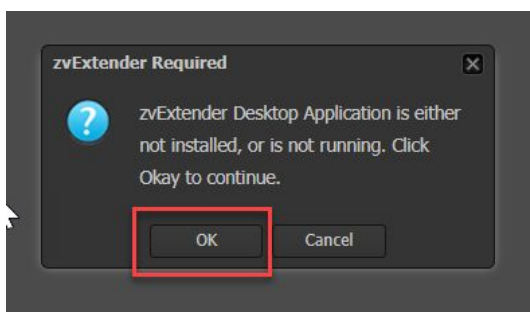
6. Notes Workflow

- a. How to Create a Note
- b. Note Lifecycle
- c. How to view a note from the worklist

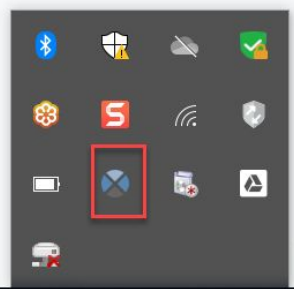
Explanation of the zVextender:

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

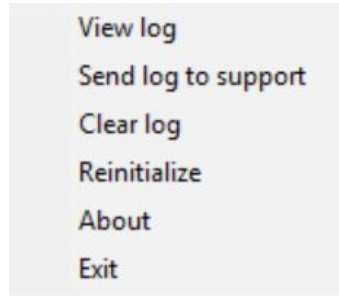
When you first log into the Clario Smart Worklist, you will be prompted to download the zVextender. Click “okay” and run after the zVextender is downloaded. If you do not have administrator privileges on your workstation, you will need your IT department to download the zVextender for you on your workstation.



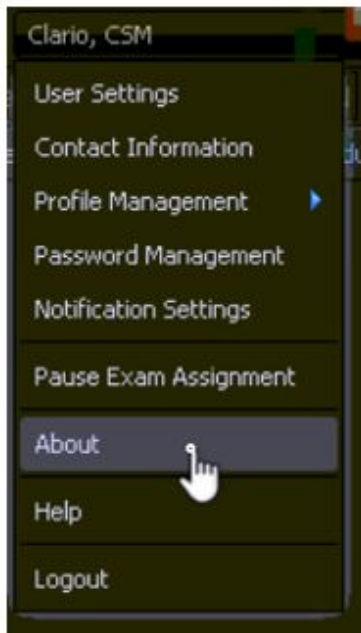
You will know that the zVextender is running when you see the zVextender logo in the taskbar of your workstation



If you right click on the zVextender icon, you can view the zVextender log, clear the log, reinitialize the zVextender, and send logs to support.



You can also reinitialize the extender, by going clicking on your name in the right hand corner and go to **About** and select the **zvExtender Desktop installer**.



How to select a shift:

Your practice may have integrated with a scheduling software, such as Qgenda or Lightning Bolt. If this is the case, the Smart Worklist will already know the shift you are working when you log in. If not, you will need to manually select your shift.

If you need to manually select your shift, you may be presented with a pop up window when you first log in. From this window, you can select the type of shift, most likely radiologist, and the shift.

Select Current Shift

Select Shift Set Working Hours

Type: Radiologist Shift: IV General

Current Shift Details

Name: IV General
 Description:
 Location:
 Date/Time: 7:00AM -5:00PM on 04/03/2020
 RVU target: 50
 Worklists:

Cancel Save

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

Select Current Shift

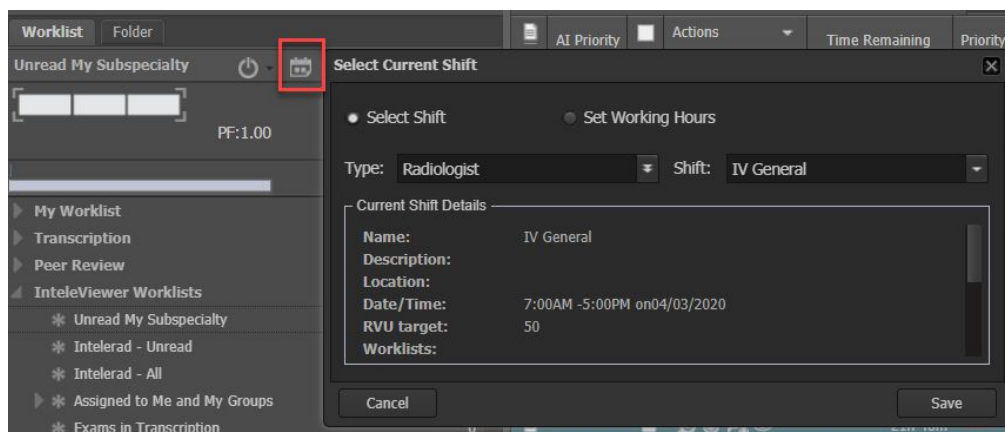
Select Shift Set Working Hours

Time Range

From: 04/03/2020 7:00 AM To: 04/03/2020 5:00 PM

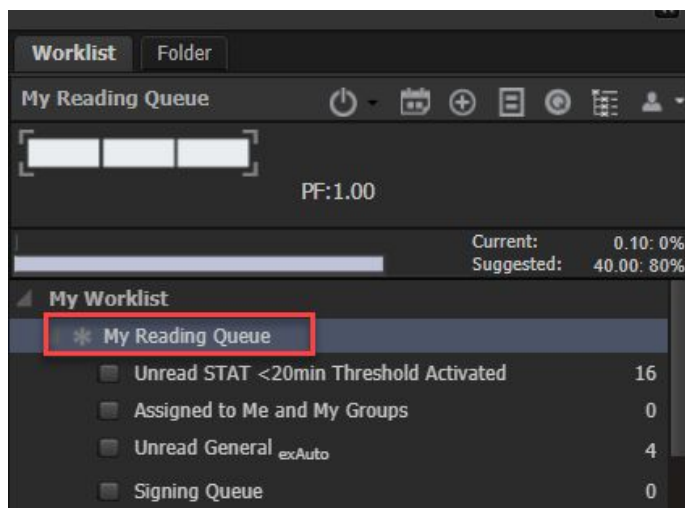
Cancel Save

If you need to change your shift after the initial selection at login, you can do this by clicking the “calendar icon” in the top left corner of the Smart Worklist.

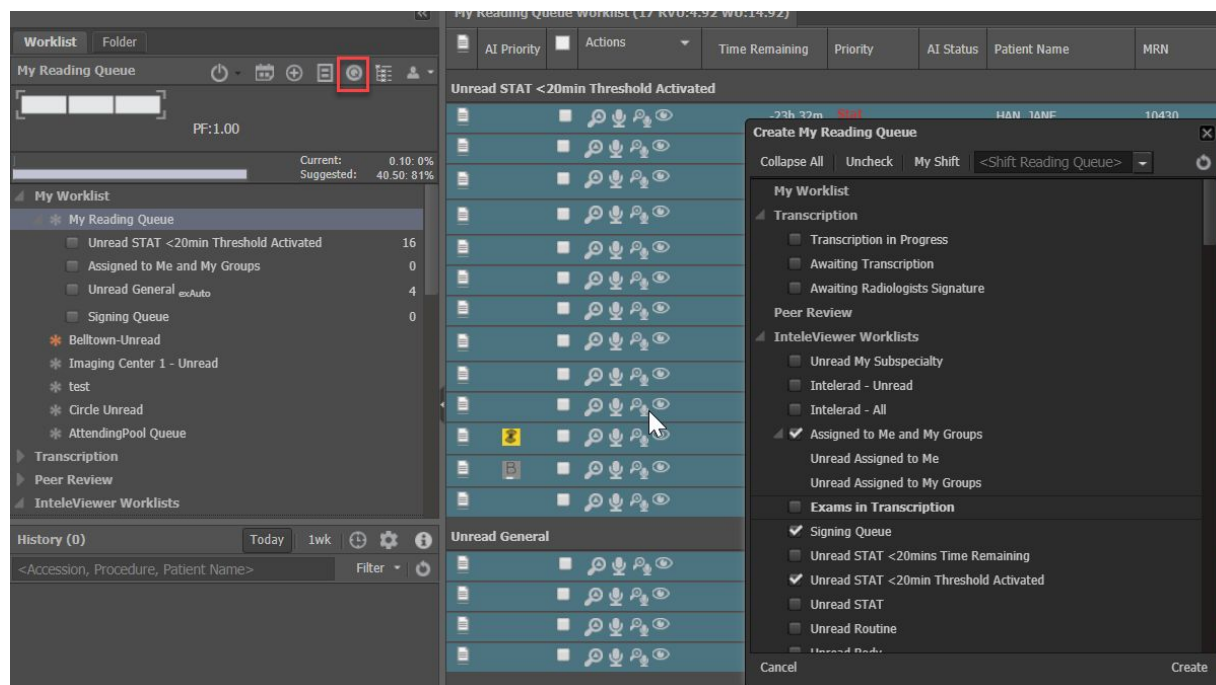


My Reading Queue and how to manage:

A “My Reading Queue” in Clario Smart Worklist is considered your “master worklist”. If you are using shift-based workflow, you will see all worklists associated with the shift under your “My Reading Queue”. These worklists will automatically populate, as soon as your shift is selected. You can see your “My Reading Queue” under “My Worklists” in the worklist panel.



If your group is not using a shift-based workflow, you can manually build your own “My Reading Queue”. To do this, click on the “Manage My Reading Queue” icon. From here, you will be presented with a “Create My Reading Queue” window. You can click on the worklists that you would like to populate your “My Reading Queue”, then click “Create”.

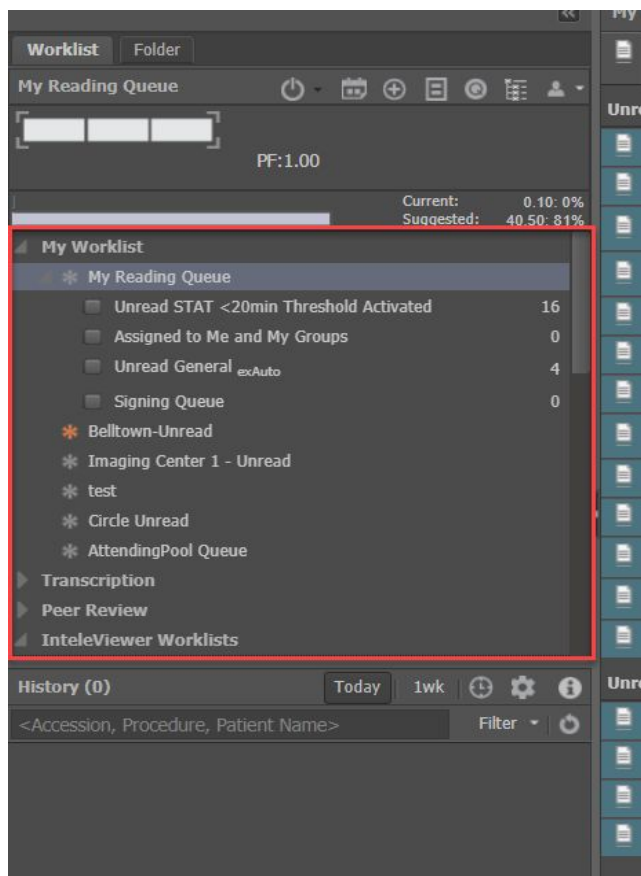


How to navigate the worklist page:

The Clario Smart Worklist page includes many features. This section will provide an overview of where to find those features.

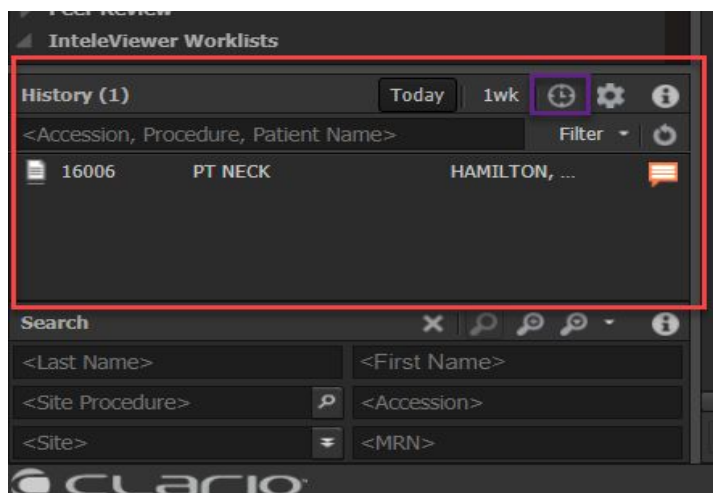
The Worklist Panel

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



The history panel

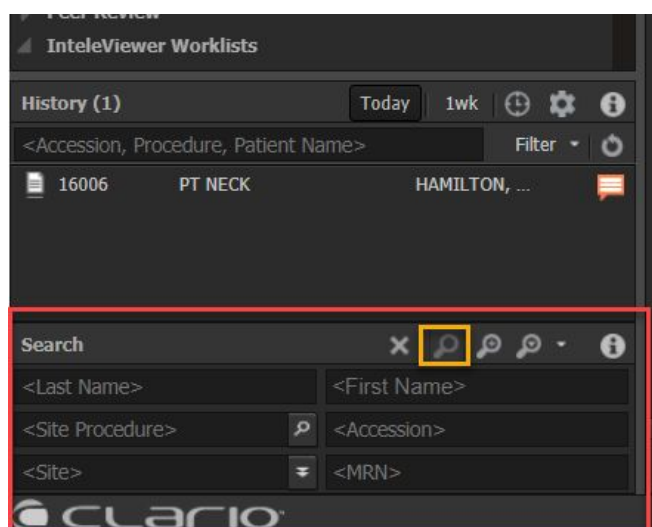
The history panel lives below the worklist panel and contains all exams that you have taken action on today. This action includes reading the exam, launching the images, creating a note, and editing any exam information. You can search your history or edit the filter to show a different date by clicking on the clock icon in the purple square. From the history panel, you can use the report hover icon to view that patient's report. You can also single click on an exam to go to that exam's patient view.



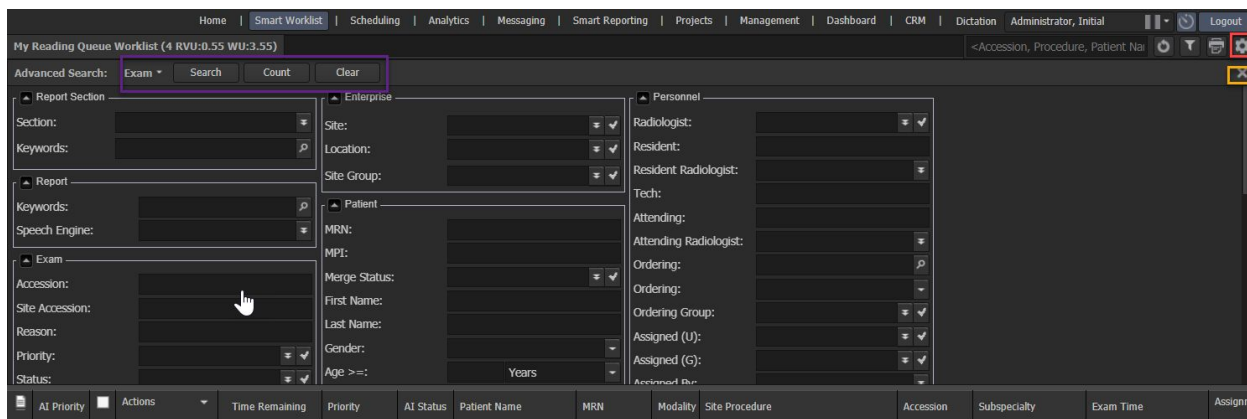
Search options

You have three search options from the smart worklist page.

1. Quick Search - Quick search lives below the history panel and is the most commonly used search for radiologists. You can search by patient last name, first name, site procedure (i.e. "ct chest"), site, accession, or MRN. You can also use any combination of these options. For example, you could search for all patients with the last name "Jones" from Community Hospital. In all of the Clario search features, you can search for a partial string by putting a "*" at the end. For example, if I wanted to find all patients that had a last name starting with the letters "Clar", I could type "Clar*" in the last name search field. To execute the search, hit "Enter" on your keyboard or click on the magnifying glass in the yellow box.



- Advanced Search - You can find advanced search by clicking on the gear icon in the top right hand corner of the screen. If you click on this gear, advanced search will pop out. If you click on the “X”, advanced search will pop in. From this panel, you have a large number of search options. Advanced search works as a filter, so you can set your filters and hit search. You can also hit “count” to see how many exams your search will return.

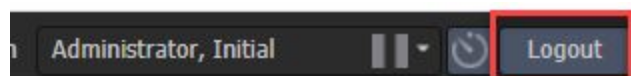


- Worklist Search - You search within a certain worklist by using the worklist search. This search will only search for exams within the worklist that you are currently viewing. In the example screenshot below, we will search for a patient with the last name “Hamilton” in the worklist that I am currently viewing. Once you hit “enter” on your keyboard, the search will be submitted. You can use this search to search by accession, procedure, and patient name.



Log out

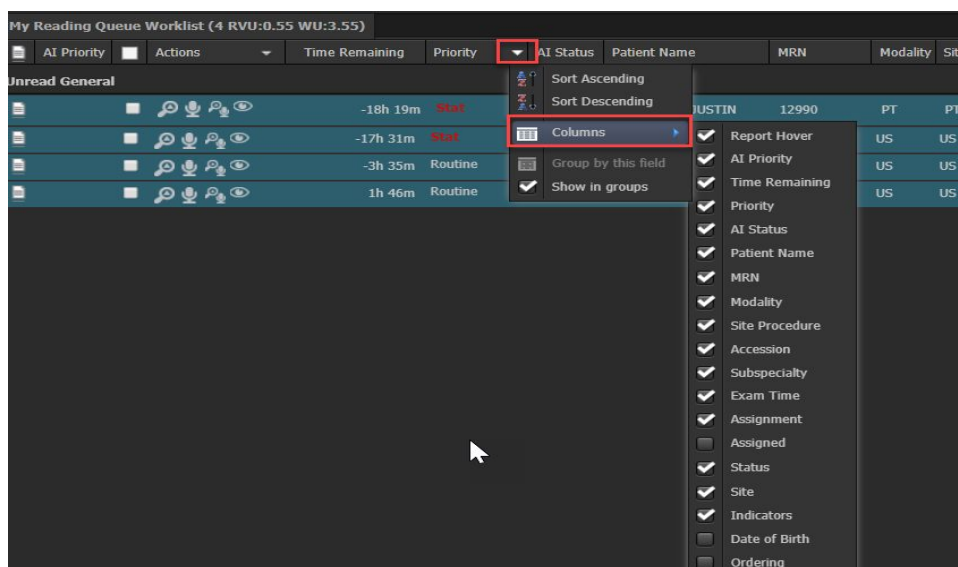
To log out of Clario, you must hit the “Logout” button in the top right hand corner of the window. This will save any layout changes you have made within the worklist and provide an assignment logout prompt. For more information on the logout assignment prompt see “How to use the assignment column and manage your assignments”.



How to customize the worklist page:

You can customize the columns on the worklist page and any panel sizing. This will help you get your worklist setup exactly the way you want.

To customize the columns you see in the worklist, click the drop down arrow on one of the columns and then hover over the word 'columns'. From here, you will see a list of all possible columns that you can display on your worklist. Check mark the ones you want to see and uncheck the ones you do not want to see.

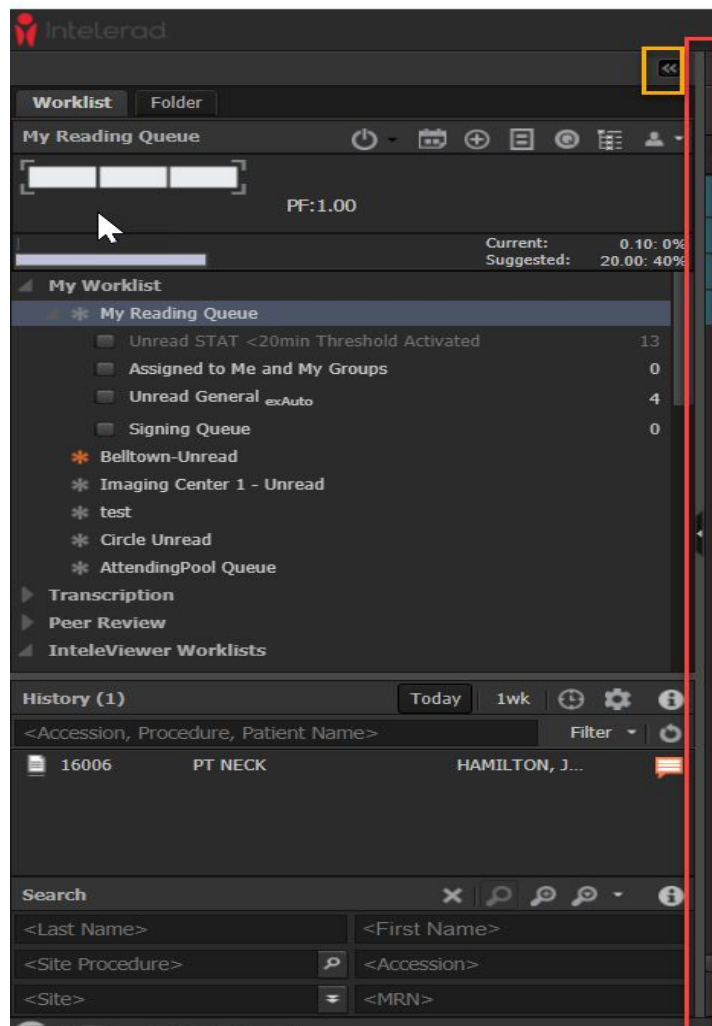


You can also click and hold to drag and drop columns into the desired order. Next, you can hover in between the columns to edit the width of each column.

To edit the worklist panel size, hover your mouse over the gray line in between the worklist panel and the worklist (red square below). You can drag and drop this panel to make it wider or more narrow. You can also click the double arrows in the orange square to completely collapse the worklist panel.

You can use the same drag and drop method to expand or decrease the history panel.

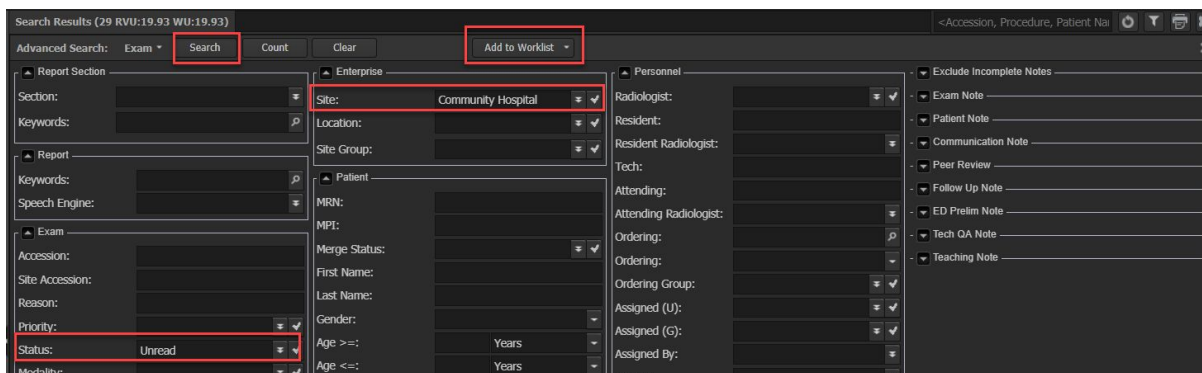
In order for your changes to save, you must hit the "logout" button in Clario. If you do not logout from Clario via this logout button, your changes will not save. Hitting the red "X" in your browser will NOT save these changes.



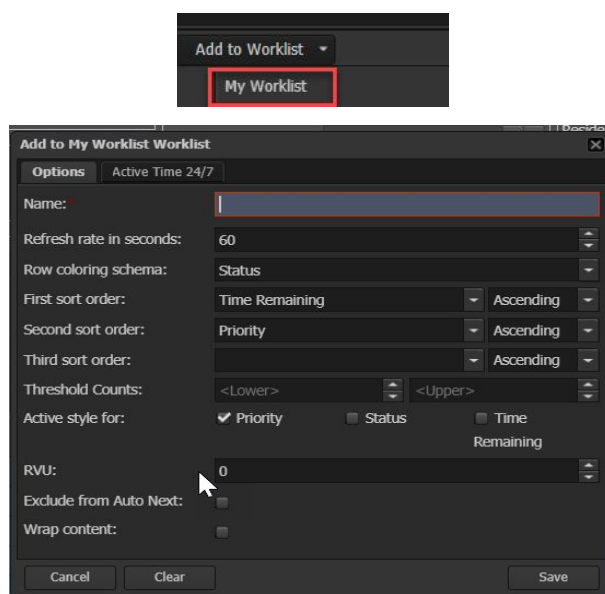
How to create your own worklist:

If you have permissions to create your own worklist, you can do this from advanced search.

Go to advanced search and input your filters. For example, if you want to find all unread exams from Community Hospital, select Community Hospital in sites and Unread in status. Next, hit search. After you hit search, you will see the “Add to Worklist” button appear. It is very important to note that you will not see the “Add to Worklist” button until after you hit search. If you do not have permission to build your own worklist, you will not see this option after you hit search.



Once you hit “Add to Worklist”, select “My Worklist”, then you will be presented with the worklist properties option. A “My Worklist” is a worklist that only you will see.



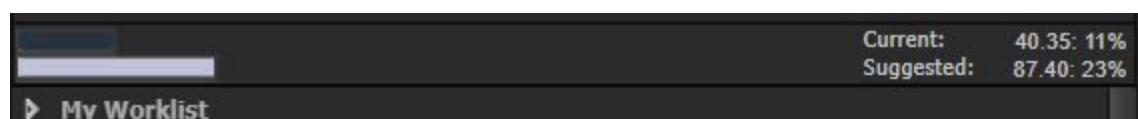
From this page, you can give the worklist a name and select the sort order. Many of the other options on this page are managed by your IT team. Once you are done, select save. This worklist will populate under your “My Worklists” on the top of the worklist panel.

How to read your productivity gauges:

There are two different productivity gauges within the Clario Smart Worklist; Workload Gauge and RVU Gauge.

How to read the RVU Gauge:

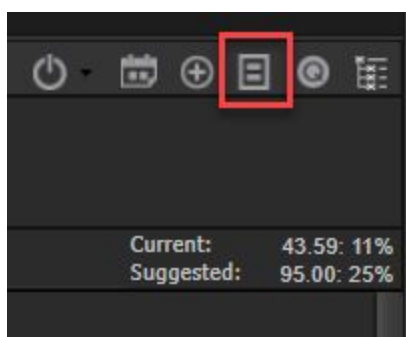
The RVU gauge displays where your productivity is at, for the shift you are working, based on an RVU goal that is predetermined by your team.



The RVU gauge is made up of two bars that quickly display your current productivity in comparison to your suggested productivity.

1. The top bar shows your current productivity and is followed by the number of RVUs that you have dictated and the percentage in relation to your goal. In the above screenshot, this radiologist has read 11% of their RVU goal.
2. The second bar shows where you should be at in relation to your goal and the time of day. In the above screenshot, this radiologist should have read 87.40 RVUs and 23% of the RVUs for the shift.

You can quickly see the exams that you have received RVU credit for today by going to your RVU gauge detail.



Gauge Detail

Current: 43.59: 11%
Suggested: 95.00: 25%

Exams							
Accession	Modality	Procedure	Procedure Code	Final Time	Time Finished Dictation	RVU	WU

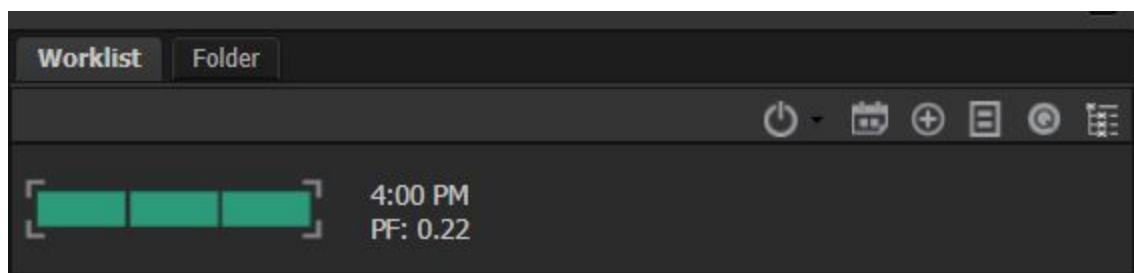
How to read the Workload Gauge:

The Workload Gauge displays your productivity in relation to your current practice's workload. This gauge is highly configurable and your practice will need to provide you information about how they decided to configure the gauge.

The Workload Gauge displays in a red/yellow/green format. Your practice may also choose a 4th color, magenta. The color indicates how you are doing in relation to your practice's workload.

The practice factor (PF), will let you know your practice's current workload.

- If your PF is 1, your practice has the exact amount of work as what your practice can handle.
- If your PF is greater than one, your practice is busier than what it can handle.
- If your PF is less than one, your practice has less work in the system than it can handle.



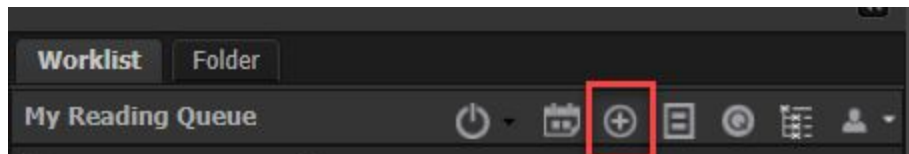
- If your gauge is red, this means you are behind or your practice is very busy.
- If your gauge is yellow, this means you are slightly behind or your practice is slightly busy.
- If your gauge is green, this means you and your practice are right on target.
- If your gauge is magenta, this means you are reading too fast or your practice is very slow.

In the example screenshot above, this radiologist's gauge is green and their PF is .22. This means that the practice has 22% of the workload that it can handle, so they are not currently busy. Therefore, the radiologist is green because they are keeping up with the practice and the practice is very slow, currently.

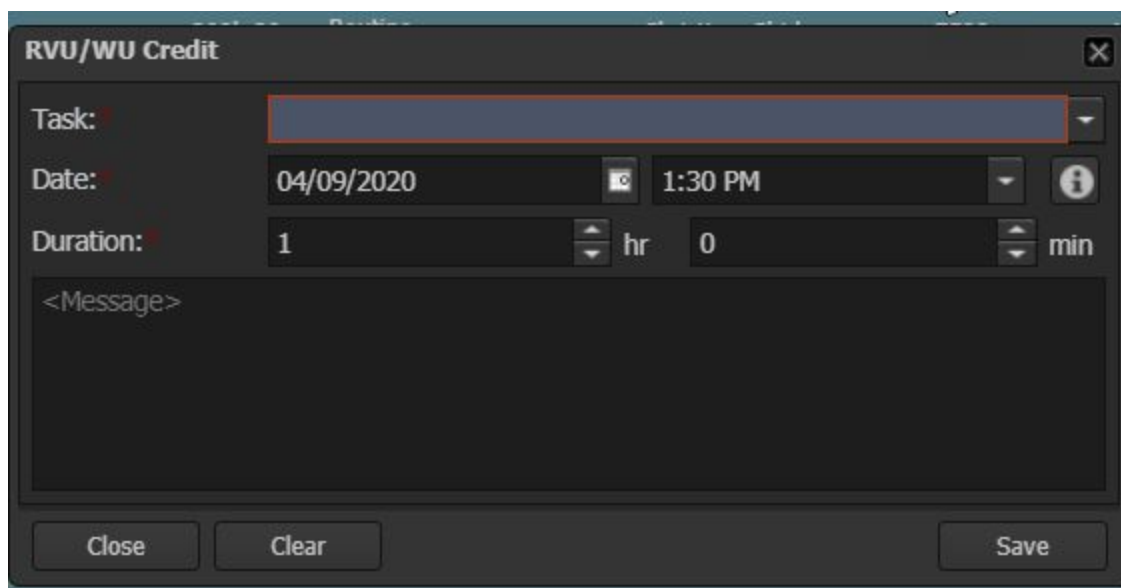
How to manually input RVU and WU credits

Many of the radiologist's RVU or Work Unit credits will come from the dictation of certain exams. However, you may complete "non-reading tasks" at times, such as a tumor board meeting. If you have the permission, you can manually give yourself RVU or WU credits for these tasks.

To do this, click on the icon in the red square below.



This will lead you to a page where you can manually enter your credits. You will need to enter the task type from the list that has been predefined by your practice. Next, you will need to select the duration of time that you spent completing that task. The date will automatically populate based on the current date and time.

A screenshot of a dialog box titled 'RVU/WU Credit'. The dialog box has a dark theme and a close button (X) in the top right corner. It contains the following fields:

- Task:** A dropdown menu with a blue bar.
- Date:** A date field showing '04/09/2020' and a time field showing '1:30 PM'. There is a calendar icon next to the date and an information icon next to the time.
- Duration:** A field with '1' in the hours and '0' in the minutes, with 'hr' and 'min' labels and up/down arrows.
- Message:** A text area containing the placeholder '<Message>'. There is a small red error icon in the top left corner of this area.

At the bottom of the dialog box, there are three buttons: 'Close', 'Clear', and 'Save'.

How to use the “Away” button

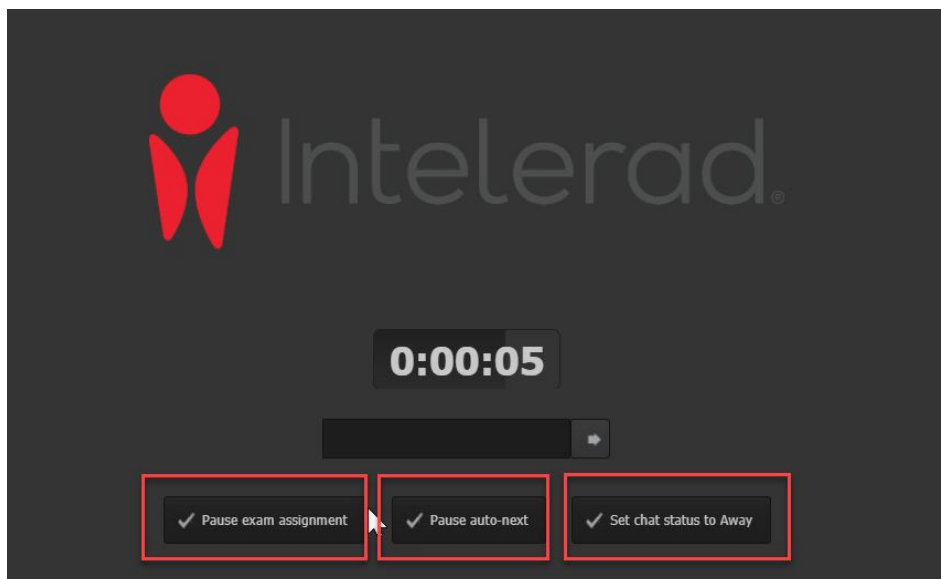
Within Clario, you have the ability to mark yourself as “away”. When you mark yourself as “away”, you can pause exam assignment, pause auto next, and/or make your messaging status “away”. This functionality will also count the number of minutes you are “away” and give you the appropriate RVU or WU credits, depending on the task.

To mark yourself as “away”, click on the Away Button next to the Logout Button.



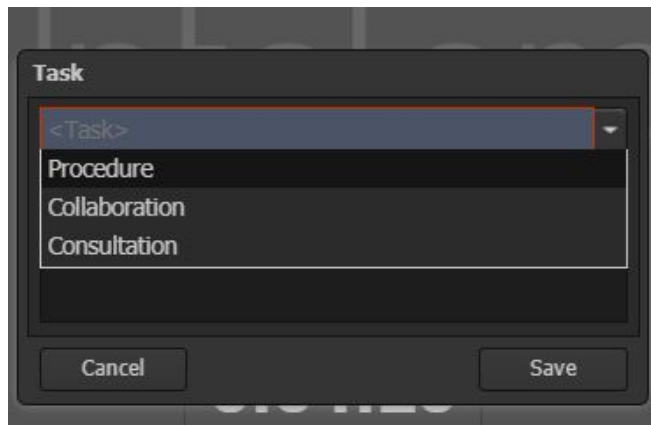
Once you press this button, you will be presented with the lock screen and have 30 seconds to select the desired actions.

- If you “Pause Exam Assignment”, no exams will automatically be assigned to you by the Clario Assignment Engine. Operations users will still be able to manually assign exams to you.
- If you pause auto next, your auto next session will be paused. See the auto next section of this packet for more details about auto next.
- If you set your chat status to away, this will show you as “away” to all other messenger users. See the messaging section of this packet for more information about messaging.
- If you do not select any of these options, your screen will simply be locked.



Once you return to your workstation to continue you working, you will enter your password to unlock the Smart Worklist.

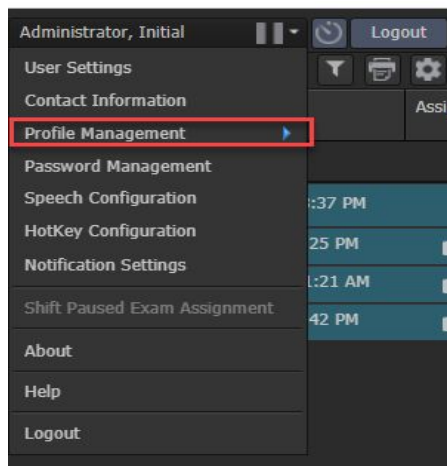
At this time, you will be prompted to identify the task you were completing. The list of possible tasks is managed by your practice administrators. Once you hit save, you will be logged back into the system and can begin reading again. You will be credited with the appropriate number of RVUs and Work Units, based on the time you were away and the task you were completing.



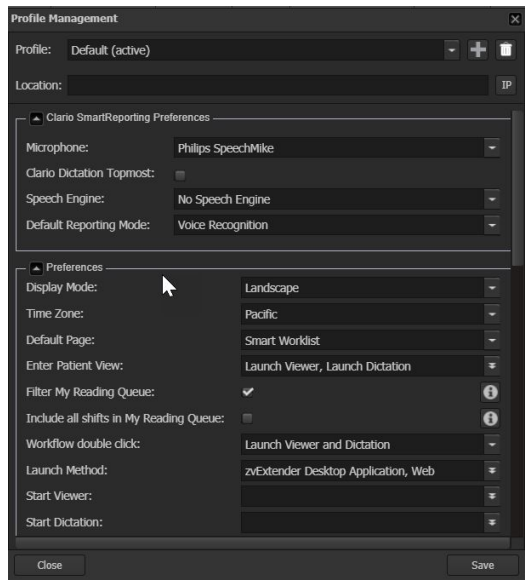
Profile Management:

As a radiologist, there are a few settings in profile management that you may want to edit. Many of the settings are managed by your PACS Administrators, therefore, this section will only cover the settings that you may want to edit.

To get to profile management, click on your name in the top right corner of the Smart Worklist, then select “Profile Management”.



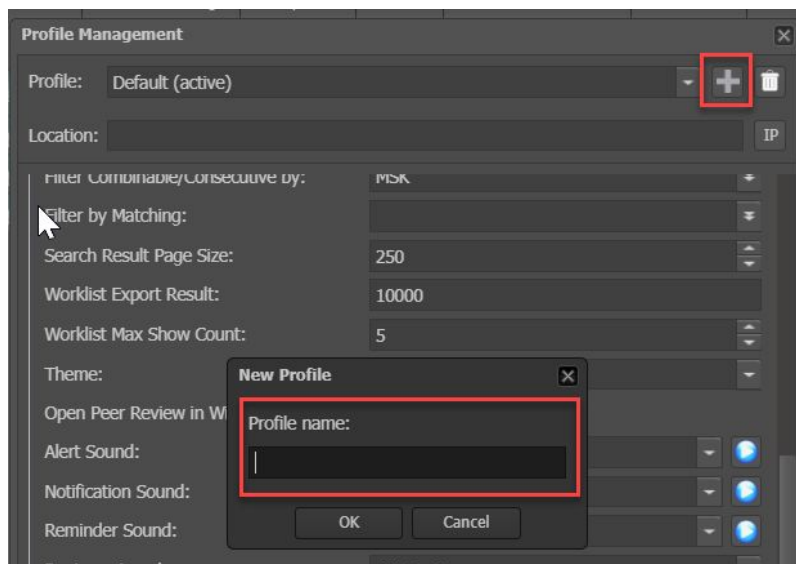
Once you select “Profile Management”, you will be presented with a list of profile options.



How to create a profile:

You can have multiple profiles within your Smart Worklist. Different profiles are useful if there are different settings that you would like to deploy, depending on the location you are working that day. If you have multiple profiles, you will be prompted to select your desired profile when you log in each day.

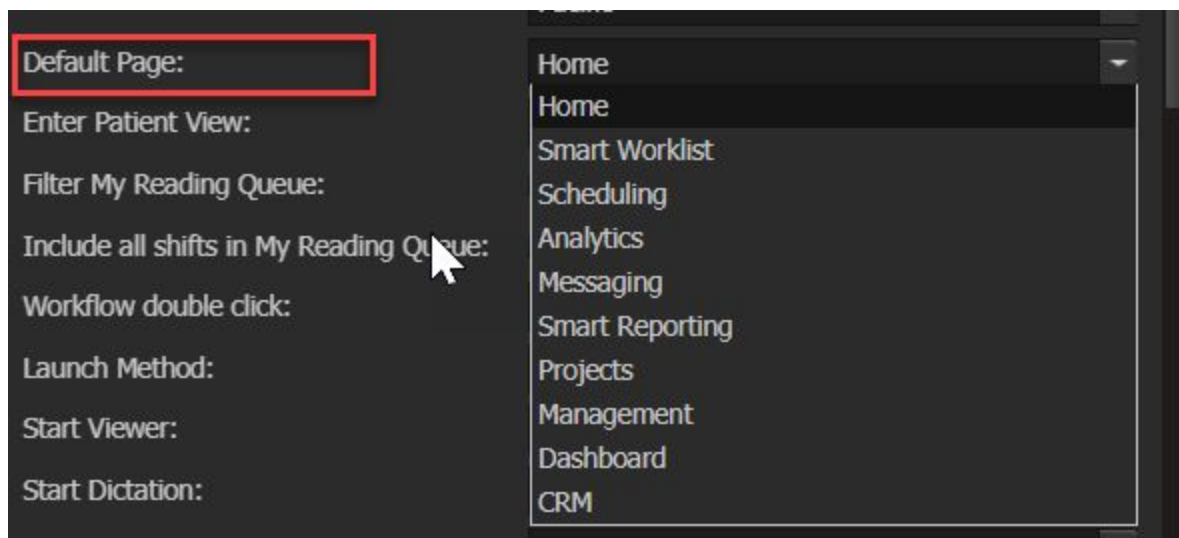
To build a new profile, simply click the “+” button, give your profile a day, and click “OK”.



Once you have saved your new profile, it will be present in the profile dropdown list. You can select that profile, make any profile changes, then hit save.

How to edit your default page:

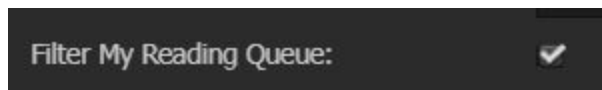
When you first log in to the Smart Worklist, you will be directed to the page that is set as your default page. You can make this any page you have access to view. Many radiologists like the Worklist page to be their default page. To make this change, select the “default page” drop down menu and choose your desired default page. Don’t forget to save.



How to filter your My Reading Queue:

Your practice may have automatically removed all exams that are assigned to other users from your My Reading Queue. However, if they did not, you can “filter your “My Reading Queue”. If you filter your My Reading Queue, your My Reading Queue will never show exams that are assigned to other users.

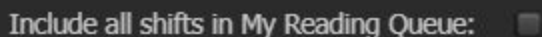
To enable this feature, simply check the box next to “Filter My Reading Queue”. Don’t forget to save.



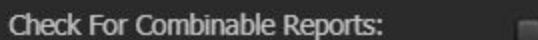
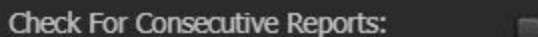
How to include all shift worklists in your My Reading Queue:

If your practice is using a shift based workflow, you may be in multiple shifts. If you are in multiple shifts, you will be prompted to select your primary shift when you log in. However, you can choose to include all worklists from each shift in your My Reading Queue.

To enable this feature, simply check the box next to “Include all shifts in My Reading Queue”. Don’t forget to save.



How to check for combinable or consecutive reports:

You will have the option to combine reports from the Smart Worklist. For example, if you would like to dictate a CT Chest and a CT Abdomen/Pelvis on one report, you can do this by combining the reports in the Smart Worklist. For more information on how to do this, see the section on how to combine reports. To enable this feature, simply check the box next to “Check for combinable reports”.

You also have the option to check for consecutive reports from the Smart Worklist. If you are in auto next, this feature will re-sort the auto next worklist queue to present you with exams on the same patient, all in a row. This is a nice feature if you prefer to ensure all patients exams are dictated at the same time. For more information on how to use this feature, see the section on how to read exams consecutively. To enable this feature, simply check the box next to “Check for Consecutive Reports”.

Don’t forget to save.

How to filter combinable or consecutive reports:

If you are checking for combinable or consecutive reports, you may want to filter these by a certain subspecialty, modality, or body part. For example, if you have the modality filtering set, the system will only prompt you to combine or read consecutively, if the exams are within the same modality. To enable this filtering, select either option below and make your filtering selection. Don’t forget to save.





How to edit the search results page size:

Each time you load a worklist, you are essentially loading a saved search. By default, the page will show 50 exams. This means that, if your search/worklist returned 51 exams, the 51st exam would be on page 2. To get to that 51st exam, you would need to go to the next page. Some radiologists would prefer that their page showed more exams, so that they next have to go to a next page and can simply scroll down, instead.

To make this edit, you can set your “search result page size” to a large number, such as 200. Don’t forget to save.



How to edit your theme:

You have 4 different “theme” or color options within the Smart Worklist; Light, Dark, Classic, and Gray. The “Dark” theme is the default theme and is demonstrated in all screenshots within this training packet. You can select your desired theme within the “Theme” drop down menu. Don’t forget to save. You will need to refresh the worklist page for the theme change to take effect.

Light Theme Example:

My Reading Queue Worklist (4 RVU:0.55 WU:3.55)				
AI Priority	Actions	Time Remaining	Priority	
Unread General				
<input type="checkbox"/>		-20h 20m	Stat	
<input type="checkbox"/>		-19h 32m	Stat	
<input type="checkbox"/>		-5h 36m	Routine	
<input type="checkbox"/>		-0h 15m	Routine	

Classic Theme Example:

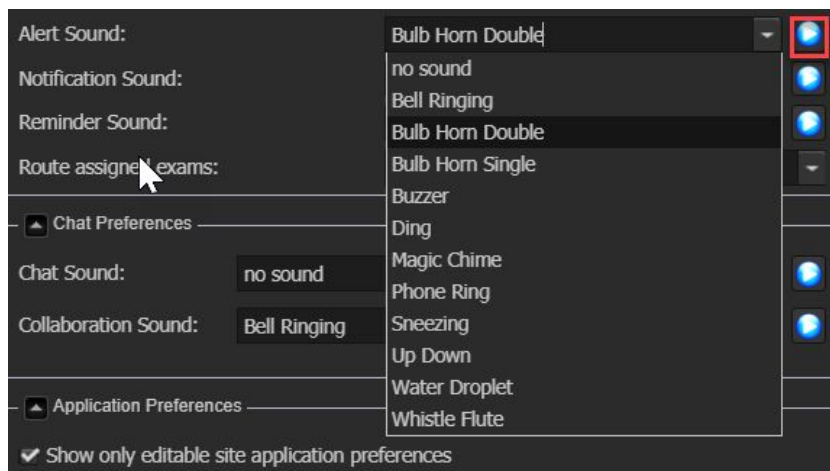
My Reading Queue Worklist (4 RVU:0.55 WU:3.55)				
AI Priority	Actions	Time Remaining	Priority	
Unread General				
<input type="checkbox"/>		-20h 21m	Stat	
<input type="checkbox"/>		-19h 33m	Stat	
<input type="checkbox"/>		-5h 37m	Routine	
<input type="checkbox"/>		-0h 16m	Routine	

Gray Theme Example:

My Reading Queue Worklist (16 RVU:4.11 WU:14.11)				
AI Priority	Actions	Time Remaining	Priority	
Unread STAT <20min Threshold Activated				
		-22h 7m	Stat	
		-21h 5m	Stat	
		-20h 57m	Stat	
		-20h 47m	Stat	
		-20h 42m	Stat	

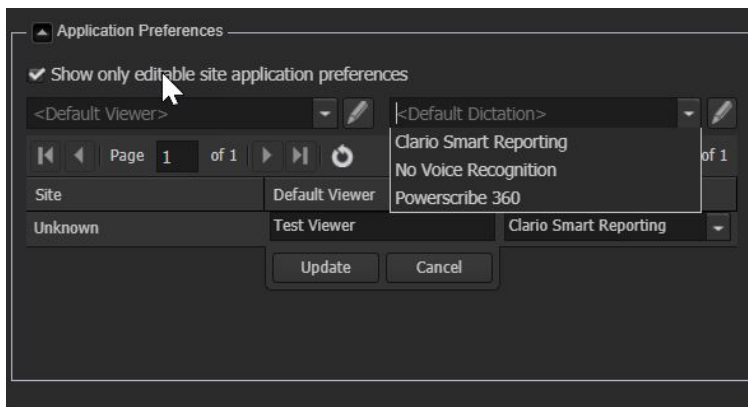
How to edit sounds:

You may want to hear certain sounds when you receive an alert, notification, message, or collaboration in the Smart Worklist. You can set these sounds within the profile management page. You can also use the blue play button to test out the sounds. Don't forget to save.



How to edit default launch methods:

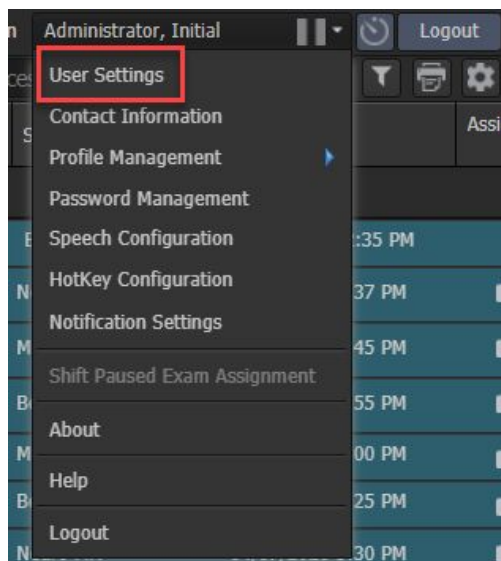
Each site that you read for out of the Smart Worklist has a default launch method for the viewer and dictation system. If your practice is only using one viewer and one dictation system, this section will not pertain to you. If your practice is using multiple viewers and dictation systems, you can set your own default method. For example, you set Clario Smart Reporting to be your default dictation system within the "default dictation" menu below. Don't forget to save.



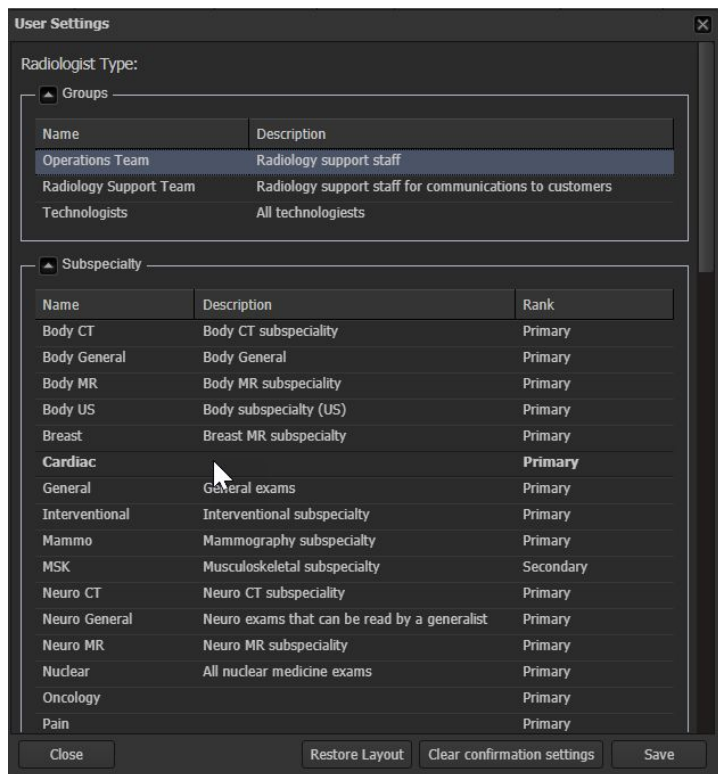
Right below the default viewer and dictation system selections, you can select the default viewer or dictation system for each individual site.

User Settings and History Indicators:

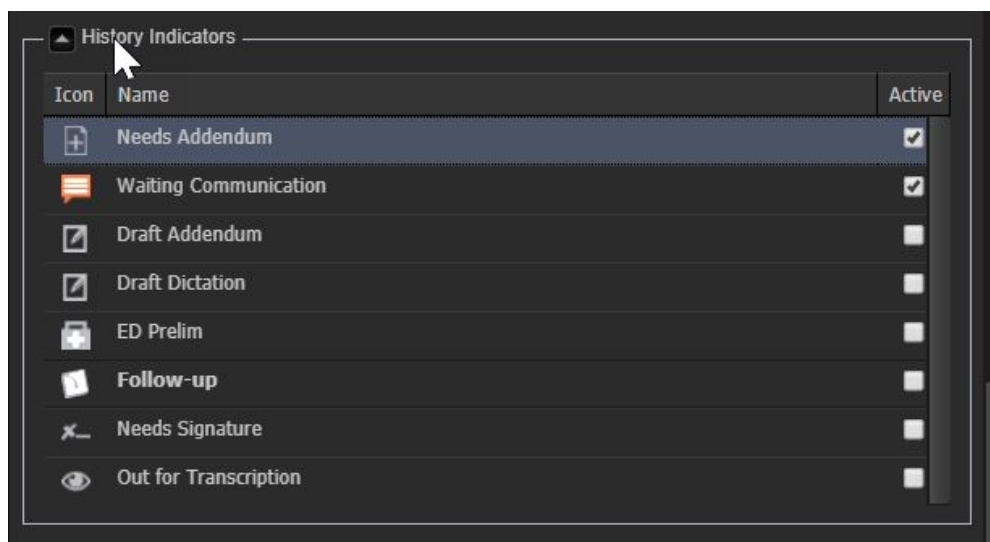
You have the ability to view all of your user settings by going to the “User Settings” menu.



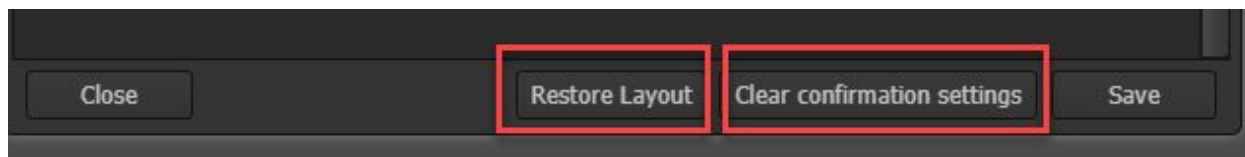
This menu will show you all of your user settings, such as what groups you are in, your subspecialties, practices, and roles.



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

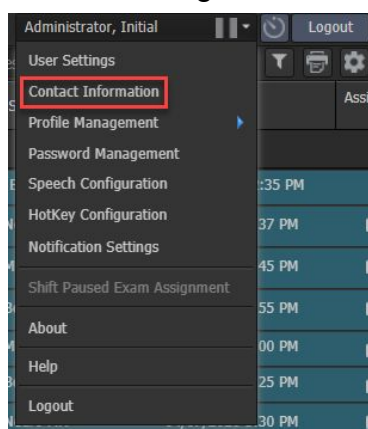


From user settings, you can also restore your layout and clear any confirmation settings. Restoring your layout will take your worklist layout, such as column width/order and panel sizing, back to default. Clearing any confirmation settings will clear any pop up settings that you have selected to “never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



Contact Management:

You may want to add your contact information into the Smart Worklist. To do this, go to contact management in the top right corner of the screen.



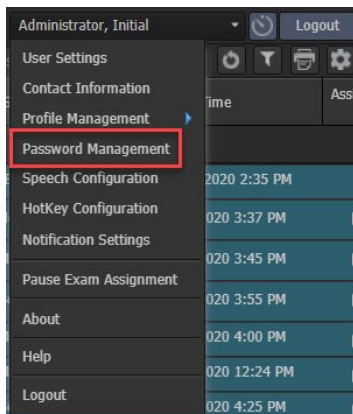
You will be presented with a pop out window where you may add your phone number, fax number, address, and email address. If you add any of this information, it will populate in the messaging application. For more information about the messaging application, please see the messaging section of this packet.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

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

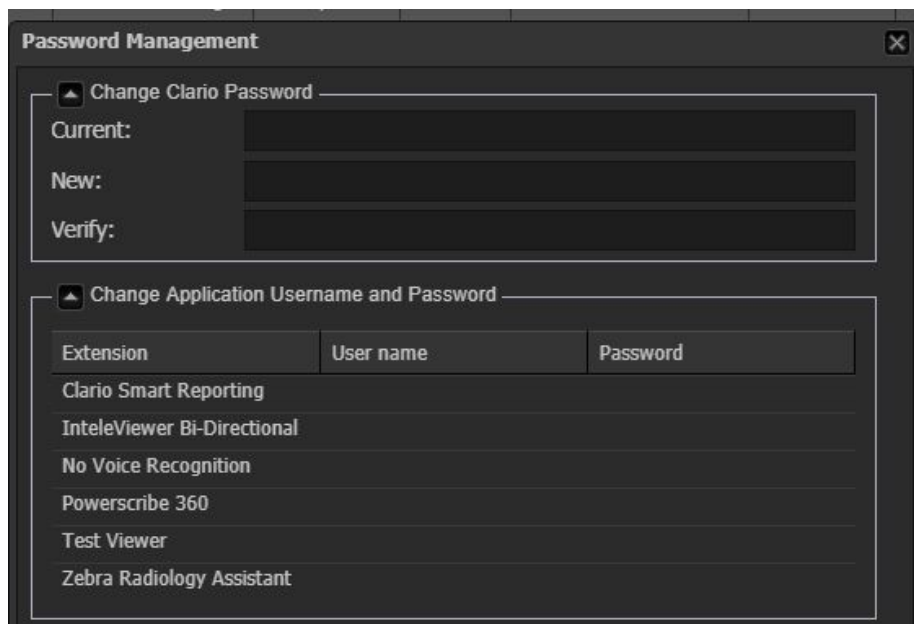
Password Management:

Your group may be managing all of your passwords via LDAP. If they are not, this section will review how you can manage your password in the Smart Worklist.

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



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

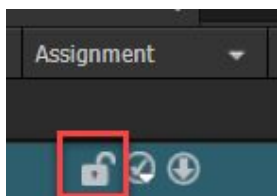


How to use the assignment column and manage your assignments:

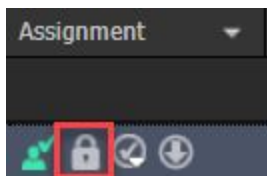
Within the Smart Worklist, if you have the permissions, you can assign exams to yourself or other users and groups. When you assign an exam to yourself, you are locking it to yourself. Depending on how your group has the worklists configured, this may remove that exam from everyone else's worklist.

Assigning exams to yourself

If you have the permission, you can assign an exam to yourself by clicking the padlock icon in the assignment column. This will move the padlock icon into the locked position.

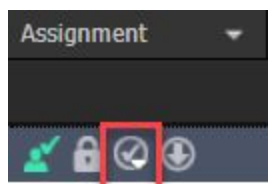


You can unassign an exam to yourself by clicking the padlock icon again. This will move it back into the unlock position.



Assigning exams to someone else

If you have the permission, you can assign an exam to someone else. To do this, go to the icon in the red square below.



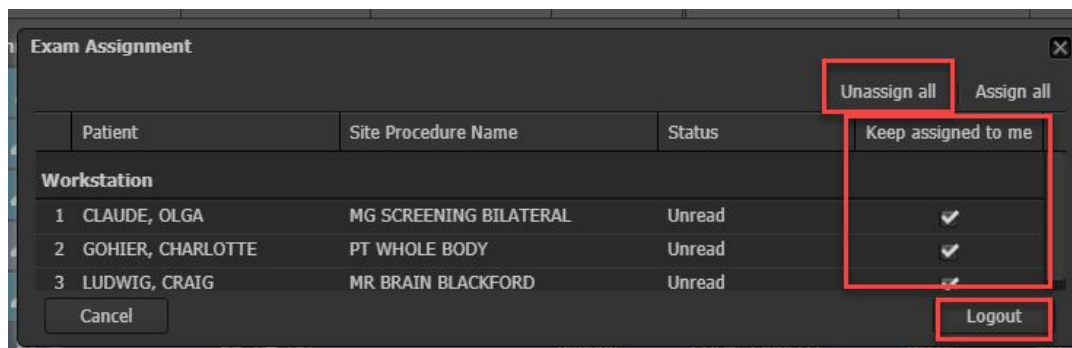
Selecting this icon will take you to the assignment window, where you can assign the exam to another user or group. You can input a reason, if desired. From this window, you can also see all of the assignment history for that exam.

 A screenshot of the "Assign" window. It features three dropdown menus for "Radiologist:", "Group:", and "User:". Below these is a checked checkbox labeled "Make assignment persistent between login sessions" and a text area for "Reason:". At the bottom, there is an "Assignment History" table with columns for Date, Assigned, Assignee, Reason, and Persistent.

Date	Assigned	Assignee	Reason	Persistent
04/12/2020 3:13 PM	-	Administrator, Initial	Unlock	
04/12/2020 3:11 PM	Administrator, Initial	Administrator, Initial	Lock Exam to Me	Yes
04/12/2020 2:04 PM	-	resident, test	Auto assignment: Return from dictation	
04/12/2020 2:04 PM	resident, test	resident, test	Auto assignment: Dictation	Yes
04/12/2020 7:33 AM	-	Larsen, Sara	Auto assignment: Return from	

How to utilize the logout prompt to manage assignments in the Smart worklist

When you logout of the Smart Worklist by clicking on the "Logout" button in the top right hand corner of the screen, you will be presented with a list of all exams currently assigned to you. If you have no exams currently assigned to you, you will simply be logged out. From this window, you can choose to unassign all exams, or pick and choose which ones you would like to leave assigned. You can choose a particular exam to unassign by unchecking that exam. Once you are done making your selections, simply click the "Logout" button.

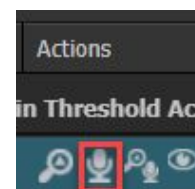


How to read an exam:

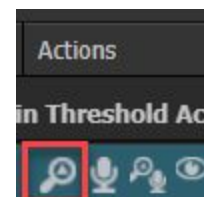
Within the Smart Worklist, you have 3 options for dictating an exam.

1. Action Column: Within the action column, you can launch in exam for dictation only, launch the images only, or launch both.

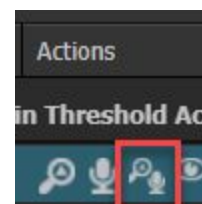
- a. For dictation only, use the “Open in Dictation” button.



- b. For viewer/images only, use the “Open in Viewer” button.



- c. For images and dictation, use the “Read Exam” button.

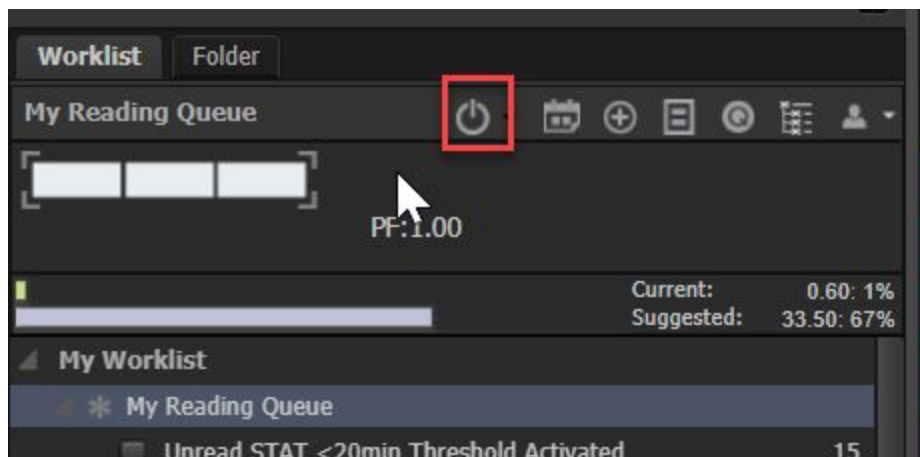


2. Double click: From the worklist page, you can double click on the exam that you would like to launch. If you double click within any of the text columns, such as the “Patient Name” column, the exam will launch in dictation and the viewer. This action works the same as using the “Read Exam” icon shown above.
3. Auto Next. See the next section for a full description of auto next.

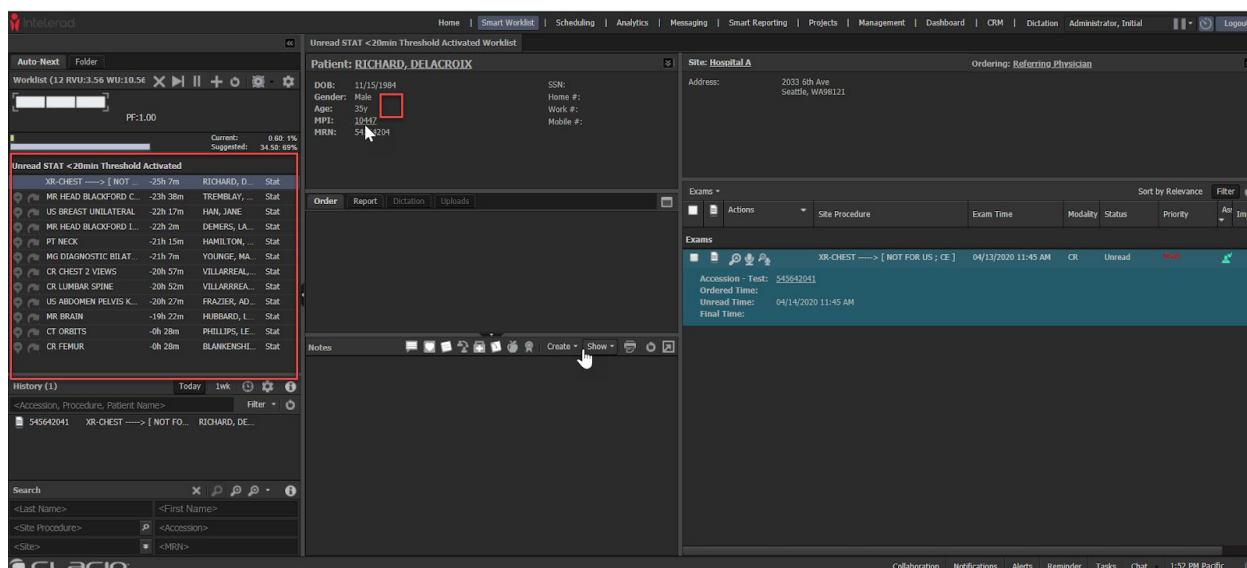
How to use auto next:

The auto next feature within the Smart Worklists allows the radiologist to save time, by auto launching the next exam on their worklist.

To start auto next, click on the power icon above your My Reading Queue.



This will immediately launch the first exam on your worklist within your dictation and viewer applications. You will see a mini version of your worklist, or your “auto next queue”, on the left hand side of the screen and the patient view window for the current patient. (For more details on patient view, please see the patient section of this training packet.)



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

You can skip exams within your auto next queue by clicking the skip icon next to that exam. This will keep the exam in your auto next queue until someone else dictates that exam, but auto next will not launch that exam for you. In the below screenshot, I have skipped the US Breast exam, therefore, when I finish reading the MR head, auto next will skip the breast exam and load the next MR Head.

Unread STAT <20min Threshold Activated

XR-CHEST -----> [NOT ...	-25h 25m	RICHARD, D...	Stat
MR HEAD BLACKFORD C...	-23h 56m	TREMBLAY, ...	Stat
US BREAST UNILATERAL	-22h 35m	HAN, JANE	Stat
MR HEAD BLACKFORD I...	-22h 20m	DEMERS, LA...	Stat
PT NECK	-21h 33m	HAMILTON, ...	Stat
MG DIAGNOSTIC BILAT...	-21h 25m	YOUNGE, MA...	Stat
CR CHEST 2 VIEWS	-21h 15m	VILLARREAL,...	Stat
CR LUMBAR SPINE	-21h 10m	VILLARRREA...	Stat
US ABDOMEN PELVIS K...	-20h 45m	FRAZIER, AD...	Stat
MR BRAIN	-19h 40m	HUBBARD, L...	Stat
CT ORBITS	-0h 46m	PHILLIPS, LE...	Stat
CR FEMUR	-0h 46m	BLANKENSHI...	Stat

You can also move an exam to be the next exam in your auto next queue by clicking the next icon to the left of the skip icon. When you indicate that an exam should be next, that exam will be assigned/locked to you and will load as soon as you finish dictating the current exam. In the below screenshot, the MR Brain has been marked as next, is locked to the user, and will load as soon as they complete the XR-chest.

Unread STAT <20min Threshold Activated

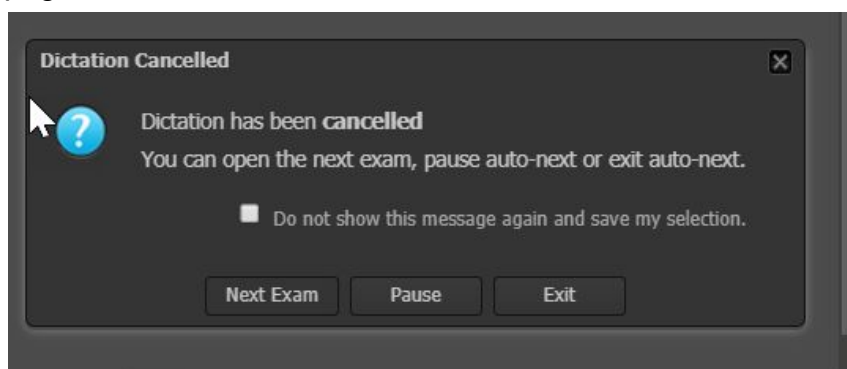
XR-CHEST -----> [NOT ...	-25h 36m	RICHARD, D...	Stat
MR HEAD BLACKFORD C...	-24h 7m	TREMBLAY, ...	Stat
US BREAST UNILATERAL	-22h 46m	HAN, JANE	Stat
MR HEAD BLACKFORD I...	-22h 31m	DEMERS, LA...	Stat
PT NECK	-21h 44m	HAMILTON, ...	Stat
MG DIAGNOSTIC BILAT...	-21h 36m	YOUNGE, MA...	Stat
CR CHEST 2 VIEWS	-21h 26m	VILLARREAL,...	Stat
CR LUMBAR SPINE	-21h 21m	VILLARRREA...	Stat
US ABDOMEN PELVIS K...	-20h 56m	FRAZIER, AD...	Stat
MR BRAIN	-19h 51m	HUBBARD, L...	Stat
CT ORBITS	-0h 57m	PHILLIPS, LE...	Stat
CR FEMUR	-0h 57m	BLANKENSHI...	Stat

Exit vs. pausing auto next:

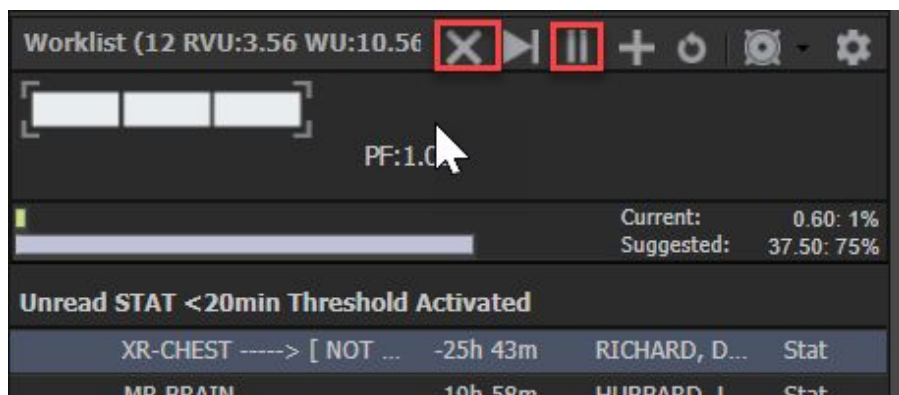
When you exit auto next, you will be taken back to the main worklist page and none of your skips will persist. When you pause auto next, you will be taken back to the worklist page and your skips will be there when you resume auto next again.

How to exit auto next:

To exit auto next, discard the exam that you are currently reading in your dictation system. Once you do this, you will see a pop up in Clario that asks what you would like to do next. Once you make your selection, you will be taken back to the main worklist page.

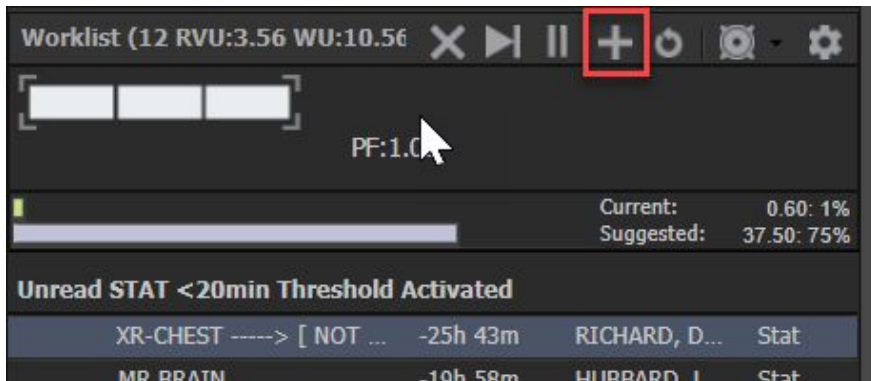


You can also exit or pause auto next by using the buttons above your auto next queue. The “X” will exit auto next and the pause button will pause auto next.

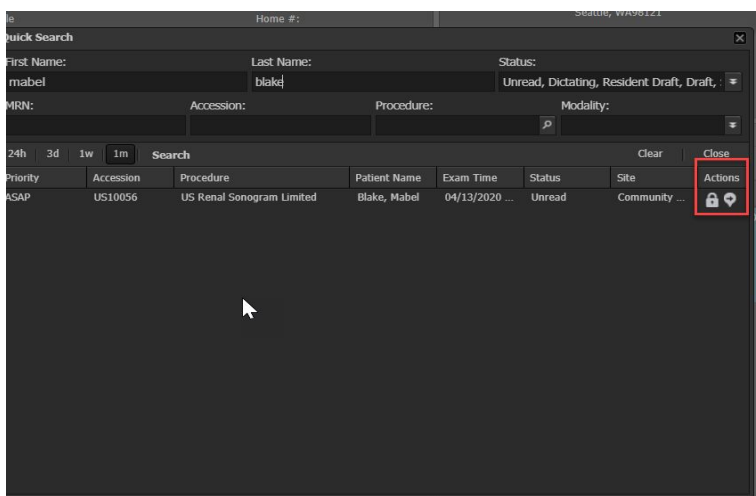


How to add an exam to your auto next queue:

If there is an exam that you need to read, but you do not see it in your auto next queue, you can add an exam to your queue by clicking the “+” button.



This will pop out a window where you can search for an exam to add to your queue. From this window, you can search for the exam, lock it to you, or lock and make it the next exam in your queue.



Once you make your selection, the button you selected will turn orange, and you can hit the "x".

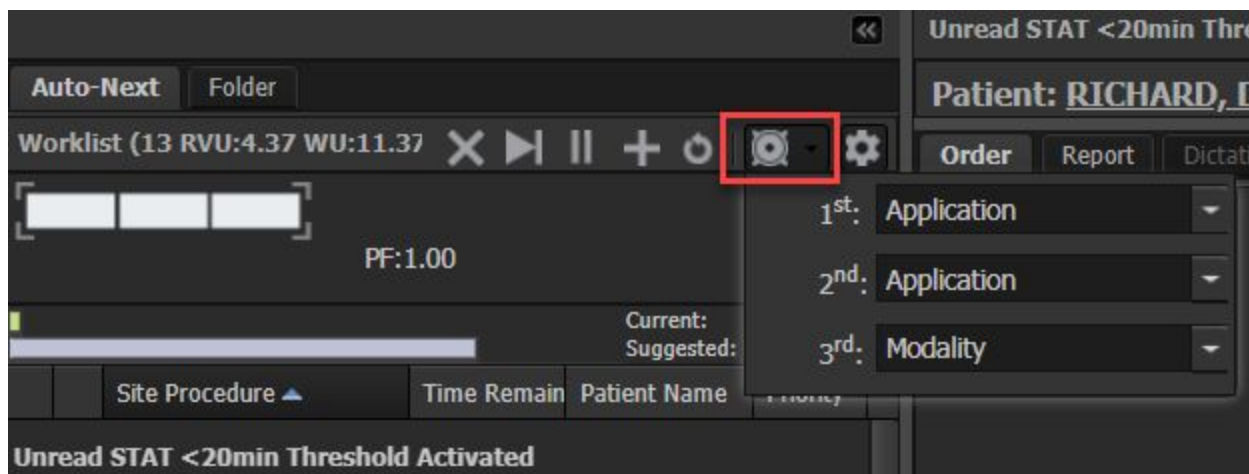
How to use the auto next optimizer:

As a radiologist, you may be interested in optimizing your auto next queue by modality, body part or application. This feature would automatically launch the next exam on your worklist, based on modality body part or application. For example, if you have optimization by modality enabled and you are currently reading a CT, auto next will launch the next CT on your worklist. This feature essentially re-sorts the worklist to launch exams based on the type of optimization you have enabled and was designed for radiologists that feel more efficient when they read within the same modality or body part. Optimizing by application is only relevant if you group is launching multiple voice recognition systems or viewers. For example, if you are launching Inteleviewer for

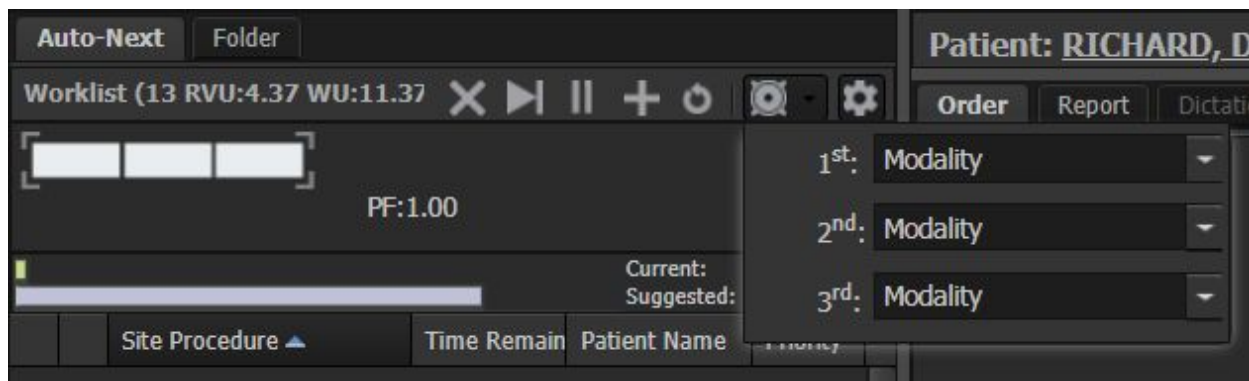
certain studies and Fuji for other studies, we could launch all Inteleviewer studies before we launch any Fuji studies. This will minimize the amount that you are switching between systems.

****Note that STAT exams override any optimization settings that you have enabled.**

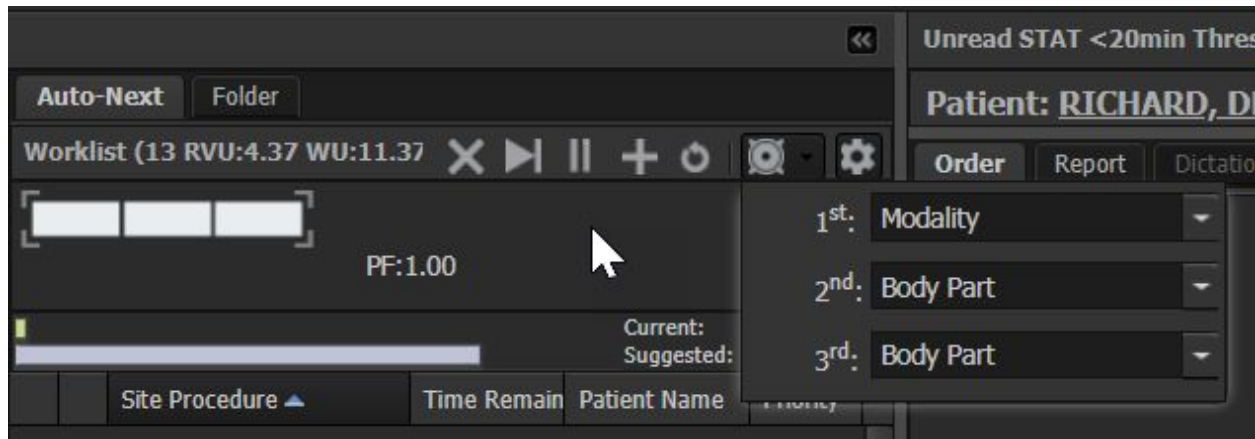
To turn on the auto next optimizer, select the drop down next to the “Optimize efficiency” icon. From this menu, you will be able to decide how you would like to optimize your auto next queue.



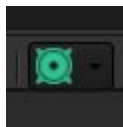
There are three different levels that you can choose for optimizing your efficiency. If you would only like to optimize based on modality, you would simply make modality your first, second, and third choice, as depicted below.



If you would like to optimize by modality and then body part, you could choose modality as your first level and body part as your second level, as depicted below. This would launch all exams within the same modality first and, within that modality, all of the exams with the same body part. For example, it would launch all CT Abdomens first, then all CT Chests.

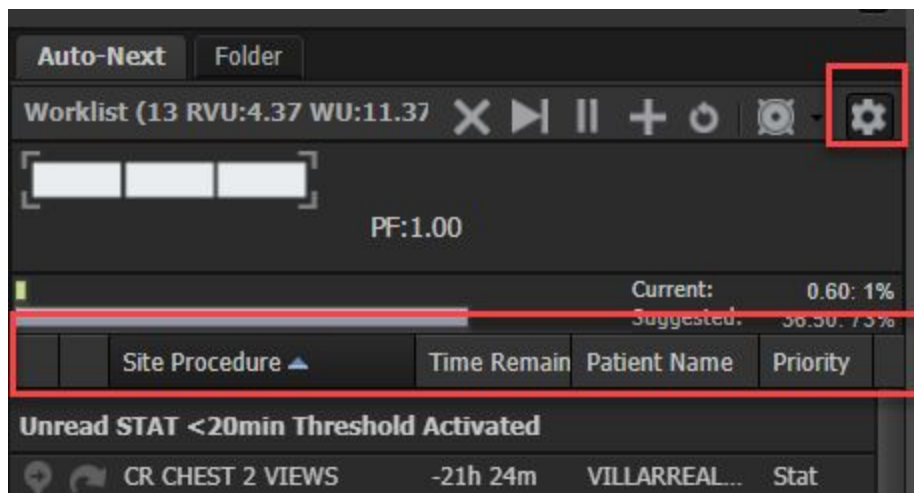


Once you make your optimization selection, turn on the optimizer by clicking on the “optimize efficiency” icon. This will turn the icon green. ****Note: The feature does NOT actually re-sort your auto next queue, it simply launches the next exam based on the efficiency settings you have selected.****



How to sort your auto next columns:

Your PACS administrator will enable certain columns in auto next, but you can re-sort them. To do this, click the gear icon above your auto next queue. Once you click this icon, you will see all auto next column headers. You can drag and drop the columns into your preferred order, similar to the main worklist page.

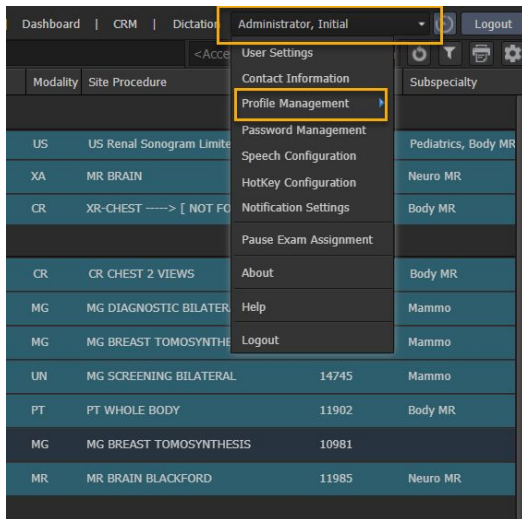


How to combine or read reports consecutively:

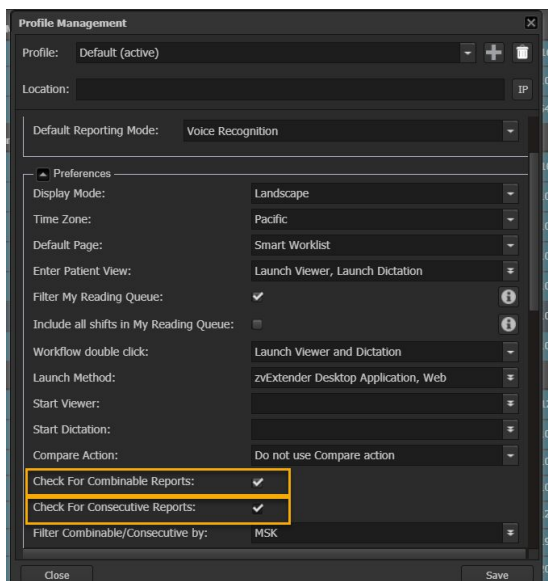
The Clario SmartWorklist can be set up to check for exams that might need to be combined or read consecutively. When enabled, if you select to read an exam and the patient has multiple unread exams, you will be prompted to select which exam to combine and/or read consecutively.

To configure a user profile to be prompted to combine and/or read consecutively:

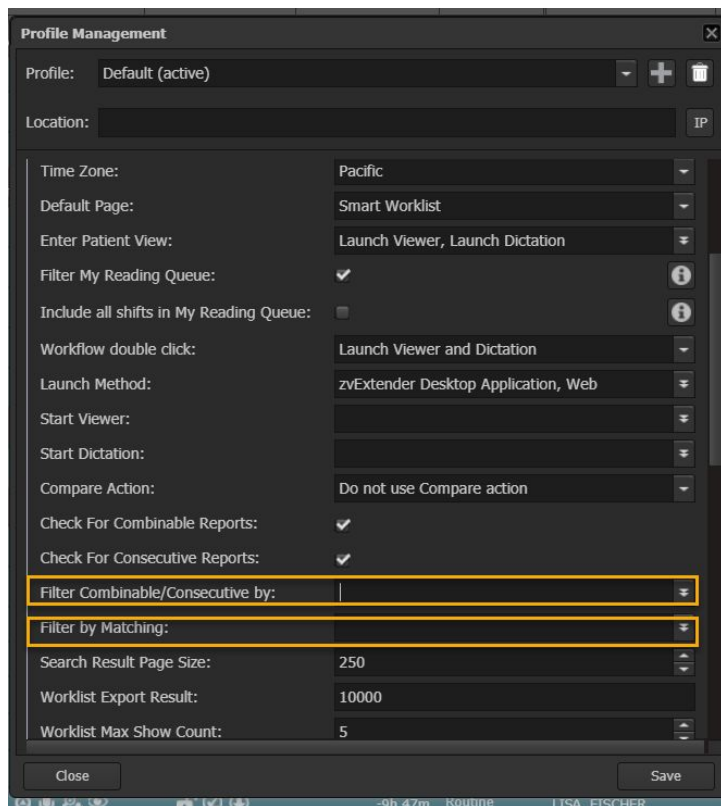
Go to Profile Management by selecting your username in the upper right corner.



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



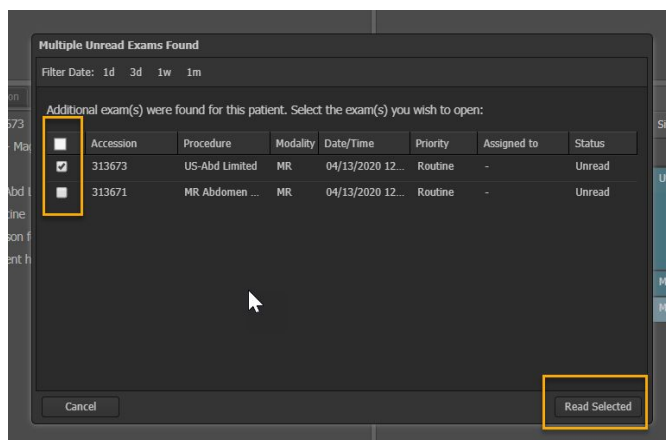
There are two options to define how the prompt behaves. You can filter the exams to show only exams tagged with specified subspecialty using the "Filter Combinable Reports by" option. This might be used by a subspecialty radiologist who would not ever read or combine exams outside of his subspecialty.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



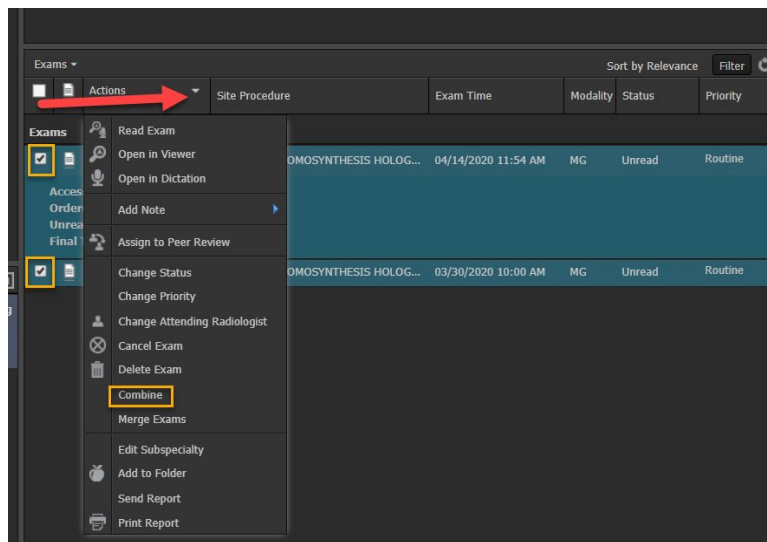
How Combine and/or Read consecutively works:

If “Check For Combinable Reports” or “Check For Consecutive Reports” is selected in your profile, and you have exams that are eligible to combine or read consecutively, you will receive a prompt asking you how you would like to proceed with the exams.

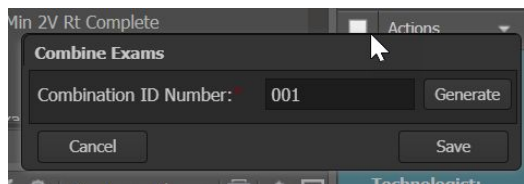
Simply mark the exams you would like to read consecutively or combine (check mark next to exam) and then select the action you would like to take: “Read Selected” (combined) or “Read Consecutively”. Combined exams will be opened together in an image viewer and reporting application.



You can also combine and uncombine exams in patient view. To combine an exam in patient view, select the exams in patient view that you would like to combine (by checking the box next to the exam). Next, click the drop down menu on the actions column and select "combine".



Generate a combine ID.



Proceed with launching the viewer and/or reporting software.

Explanation of patient view:

Patient View, which opens when you select an exam (single click to view or double click to read), displays all of your patient and exam information in one view. There are five panels in Patient View:

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

Search Results (10000 RVU:9435.69 WU:9988.11)

Patient: Abel, Judy 1

DOB: 10/02/2019 SSN: 123-45-6789
 Gender: Female Home #: 206-123-4567
 Age: 6m Work #: 425-123-4567
 MPI: 3496 Mobile #: 206-321-7654
 MRN: 4564

Site: Community Hospital 4

Phone: 866-941-6412
 Address: 520 Pike St
 Seattle, WA98101

Ordering: Phyllis Wolff Dr.

Phone: 206-555-5562 (Work)
 Fax: 206-665-2398
 Email: pwolff@pikeimaging.com

Order 2 Report Dictation Uploads

Accession - Test: DX23136
 Modality: MA - Magnetic resonance angiography
 Location: University
 Procedure: Mammogram, Screening
 Priority: Routine
 Exam Reason: SCREENING, MAMMOGRAM, OTHER
 History: Patient has had a previous surgery
 Comments: Patient movement during scan

Notes 3

EXAM NOTE-Teaching Case
 Acute profound hypoxic-ischemic injury. Lateral thalamic, periventricular CS tracts. diffusion restriction.
Lawson, Jennifer, 12/22/2019 8:42 AM

COMMUNICATION NOTE-Standard Call Report Completed
 Communicated as requested
 Assigned: Radiology Support Team
guest2, guest, 12/18/2019 9:36 PM

Waiting
 Please fax result to the ordering physician
Anderson, Marcus, 12/18/2019 10:05 PM

Exams 5 Site Procedure Exam Time Modality Status Priority Assignment Impression Sort by Relevance Filter

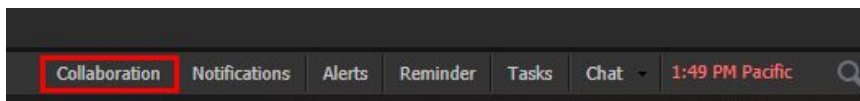
Exams	Exam Time	Modality	Status	Priority	Assignment	Impression
Mammogram, Screening	04/11/2020 4:01 PM	MA	Final	Routine		BENIGN MAM...
Accession - Test: DX23136 Ordered Time: 04/11/2020 8:38 AM Unread Time: 01/27/2020 3:01 PM Final Time: 04/13/2020 12:01 AM						
Mammogram, Screening	04/10/2020 8:16 AM	MA	Final	Routine		BENIGN MAM...
HAND RIGHT 3 VIEWS	04/10/2020 2:14 AM	OT	Final	Call PE		NO RADIOGR...
US Aorta	04/10/2020 1:55 AM	US	Final	Routine		NO ABDOMIN...
CT CERVICAL SPINE WITHOUT	04/09/2020 11:43 PM	CT	Final	Stat		NO ACUTE O...
CHEST PA/LAT	04/09/2020 8:48 PM	XA	Final	Stat		NORMAL TW...
FEMUR RIGHT 2 VIEWS	04/08/2020 9:41 PM	XA	Final	Stat		Internal fixati...

How to use collaboration:

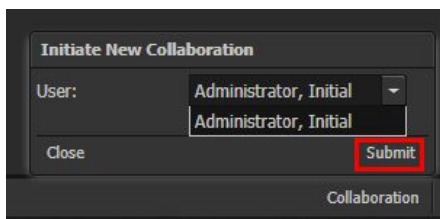
Collaboration is a tool for radiologists to communicate with one another about a specific exam. This feature is only available when accessing the exam through the Patient View.

To start a collaboration:

1. Launch the exam (single-click to view or double-click to read).
2. From Patient View, select the collaboration option located at the bottom of the Clario window.

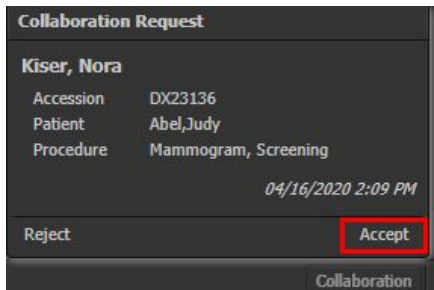


3. From the drop-down menu select the user with whom you want to collaborate with and click submit



To accept a collaboration:

1. Click "Accept" when the collaboration pops-up on your screen.



Collaboration Window.

Whether Starting or Accepting a Collaboration, both users will receive a pop-up window that contains information related to the exam. From this window, users can see patient and exam information, any prelim or final reports, and any notes associated with the exam. Users can also chat with one another and the Accepting Radiologist can easily launch the images.

Clario - Collaborate - Google Chrome

rsnasw10.demo.intelerad.com/?collaborate&162421587071373562

Abel, Judy (DX23136 - Mammogram, Screening)

Abel, Judy

DX23136 - Mammogram, Screening

Site	Community Hospital	DOB	10/02/2019	Ordered Time	04/11/2020 8:38 AM
Priority	Routine	Gender	Female	Begun Time	01/28/2020 4:35 PM
Status	Final	Age	6m	Unread Time	01/27/2020 3:01 PM
Exam Reason	SCREENING, MAMMOGRAM, OTHER	MPI		Prelim Time	04/06/2020 9:41 AM
Ordering Radiologist	Phyllis Wolff Wood, Chris	MRN	4564	Final Time	04/13/2020 12:01 AM

Report templates courtesy of Eidetico. Visit eidetico.com for license details.

EXAMINATION: MAMMO ROUTINE BILAT

REASON FOR STUDY: SCREENING, MAMMOGRAM, OTHER. COMPARISON: None.

TECHNIQUE: Standard craniocaudal and mediolateral oblique views of each breast recorded using digital acquisition.

LIMITATIONS: None.

DENSITY: Scattered; 25-50% fibroglandular tissue.

FINDINGS: Findings present which are benign by mammographic criteria. No suspicious masses, calcifications or architectural distortion. Read with the assistance of CAD.

CAD: COHC Imaging R2 Cenova Version 1.3 CGH R2 Checker Version 1.1.5.0 OMH R2 Checker Version 9.2 CEMC ICAD Version 7.2H

IMPRESSION: BENIGN MAMMOGRAPHIC FINDINGS. BIRADS 2

RECOMMENDATION: ROUTINE SCREENING

BIRAD: 2 BENIGN FINDING(S)

PATIENT NOTIFIED BY LETTER. American College of Radiology, American Cancer Society, and American College of Obstetrics and Gynecology recommend an annual screening mammogram for women aged 40 years or over. Each patient will receive a reminder letter prior to the anniversary date of her mammogram. The American College of Radiology (ACR) has developed recommendations for screening MRI of the breasts in certain patient populations, to be used in conjunction with mammography. Breast MRI surveillance may be appropriate for women with more than 20% lifetime risk of developing breast cancer as determined by genetic testing, significant family history of the disease, or history of mantle radiation for Hodgkin's Disease. ACR Practice Guidelines 2008. Coverage is provided by signing physician for supervising physician

EXAM NOTE-Teaching Case: Acute profound hypoxic-ischemic injury. Lateral thalamic, periventricular CS tracts. diffusion restriction.
Lawson, Jennifer, 12/22/2019 8:42 AM

COMMUNICATION NOTE-Standard Call Report: Communicated as requested
guest2, guest, 12/18/2019 9:36 PM

Waiting-: Please fax result to the ordering physician
Anderson, Marcus, 12/18/2019 10:05 PM

Chat with Radiologist: Kiser-test, Nora

Type here to chat...

*Note: Popup blocker needs to be turned off to allow the collaboration window to open.

How to use the resident and attending workflow

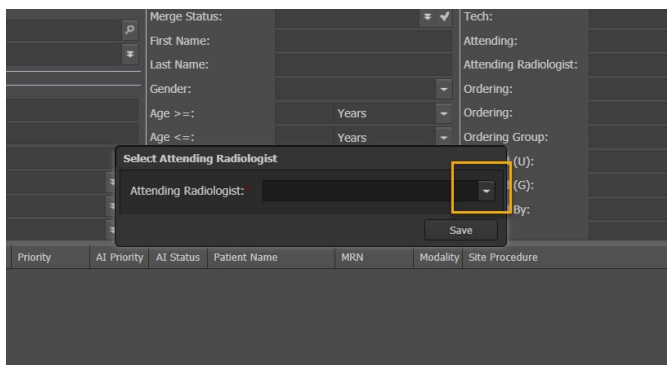
The Smart Worklist hosts a workflow for your resident radiologists to collaborate with their attending physicians.

Starting with the Resident portion of this workflow, the resident will log in to the SmartWorklist and select "Worklist"

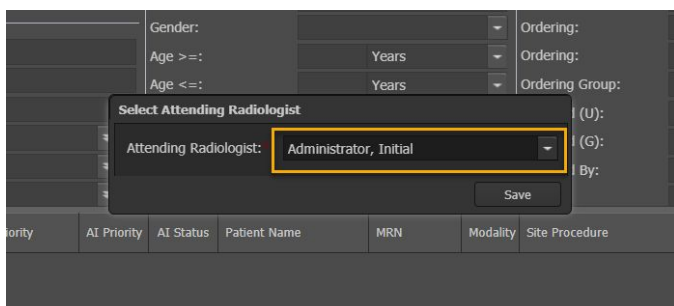
Selecting the Attending

The resident will be prompted to select the attending radiologist he or she will be working with. By selecting the attending radiologist, a queue of all exams read by the resident will be created for the specified attending radiologist.

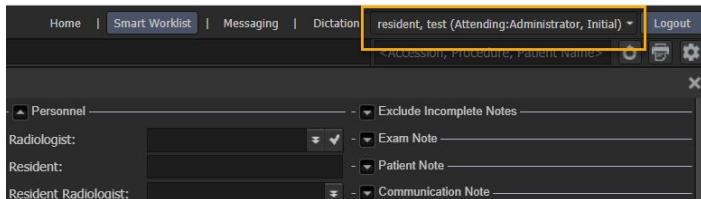
>>>> NOTE: If the Resident selects "NONE" from the dropdown, all resident drafted exams will go into an "Attending Pool". Any Attending Radiologists with access to the Attending Pool will then have the ability to see these exams.



Radiologist: "Initial Administrator" is selected as the attending for the purpose of this training.



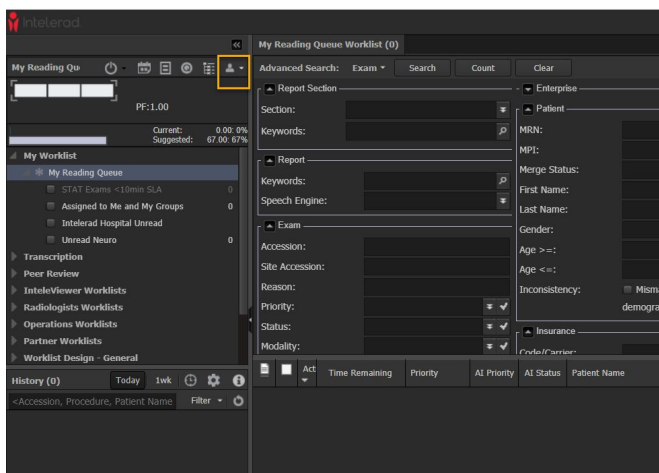
The selected attending resident will be noted next to the user's name in the top right corner of the screen.



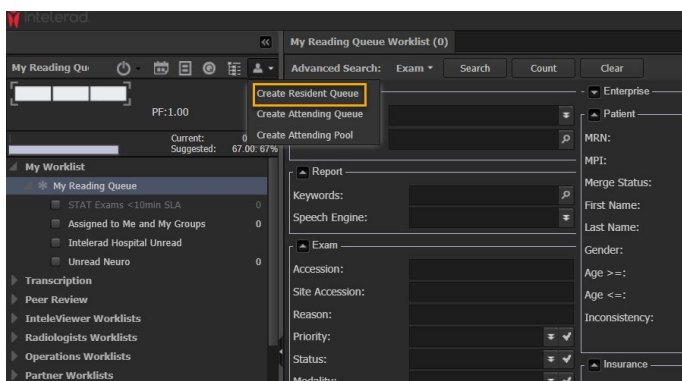
Creating Resident Queue

The resident should first build his or her "Resident Queue"

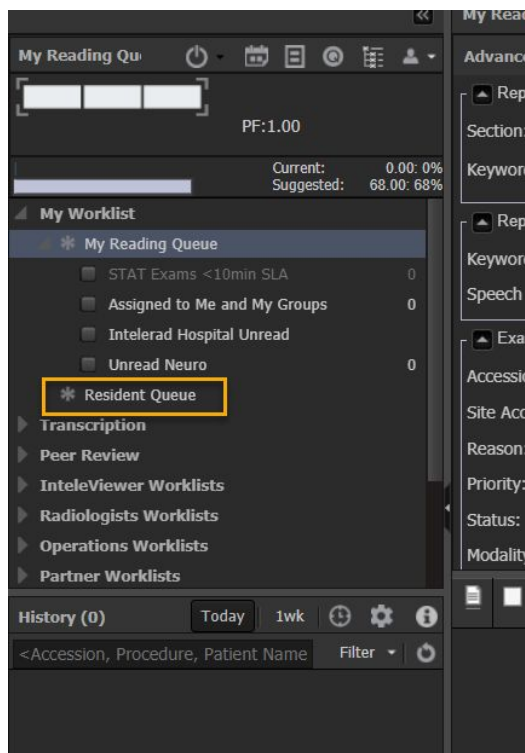
To do so, simply select the profile icon.



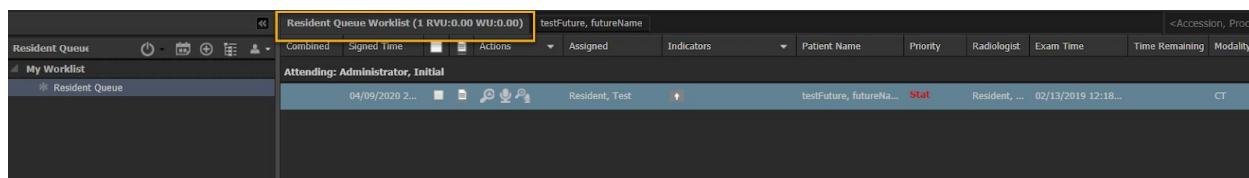
And select "Create Resident Queue"



The resident queue will appear under "My Worklist"

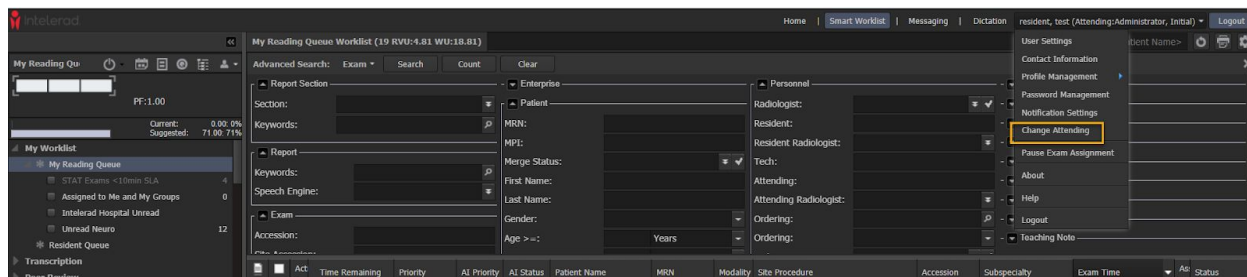


The purpose of the Resident Queue is to capture all of the "Resident Drafts" the resident creates. Thus as a resident "reads" exams, they will appear in his or her Resident Queue. As you can see, there is currently 1 exam in "Draft" status waiting for the attending to evaluate.

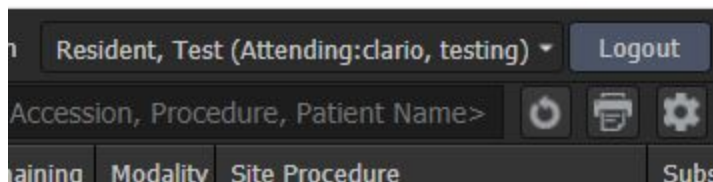


Changing the Attending

Oftentimes a resident will need to work with more than one attending radiologist. To change the attending radiologist simply select the username in the upper right hand corner of the screen. A drop down will appear. Select "Change Attending"

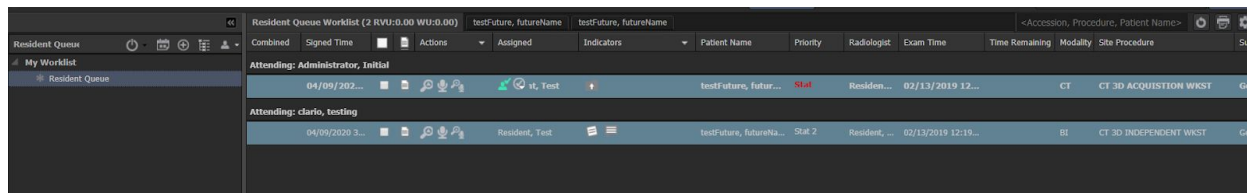


The newly selected attending will appear in the upper right corner of the screen next to the user name.



Resident Queue with multiple Attending

Notice, the exams the resident saves as drafts are saved in tab form at the top of his or her page, however are divided up by the attending they are assigned to in the Resident Queue



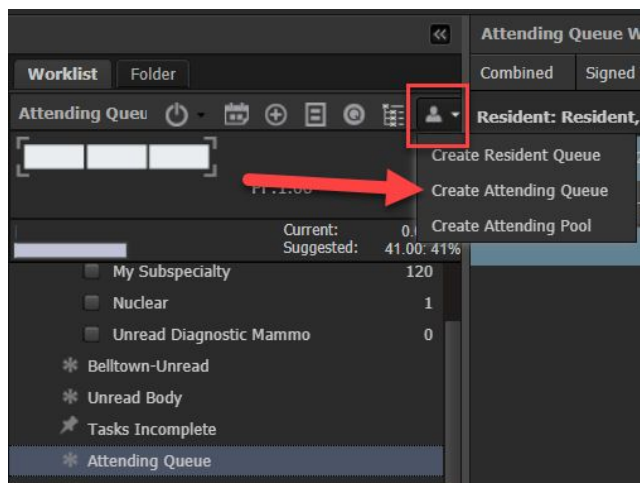
Attending

Now that our resident has assigned exams to a couple of attending radiologists, we will take a look at the "Attending" portion of this workflow.

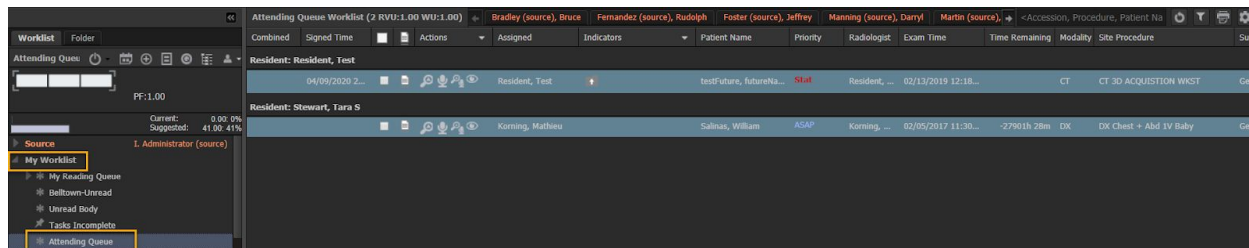
Creating Attending Queue

The resident should first build his or her "Attending Queue". This will pull any exams that have been assigned to him or her by a resident.

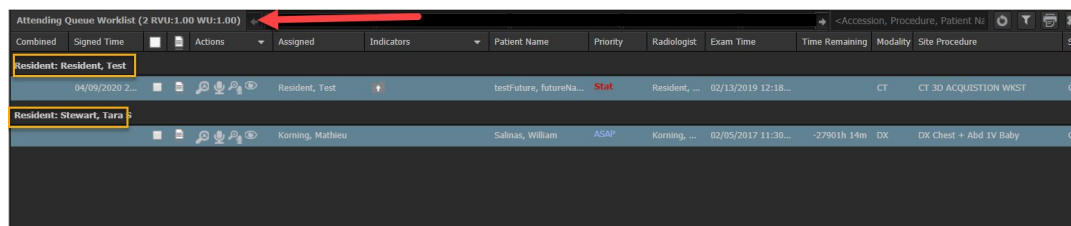
To do so, simply select the profile icon and select "Create Attending Queue".



The Attending Queue will appear under "My Worklist"



The attending radiologists' worklists will appear in stacked form separated out by the different residents.

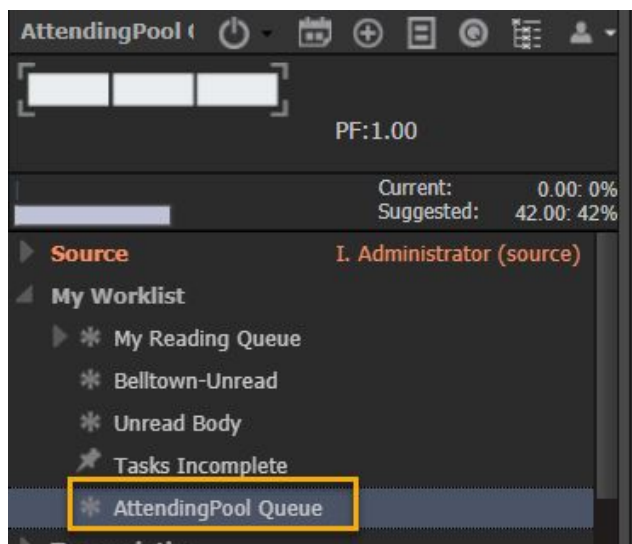
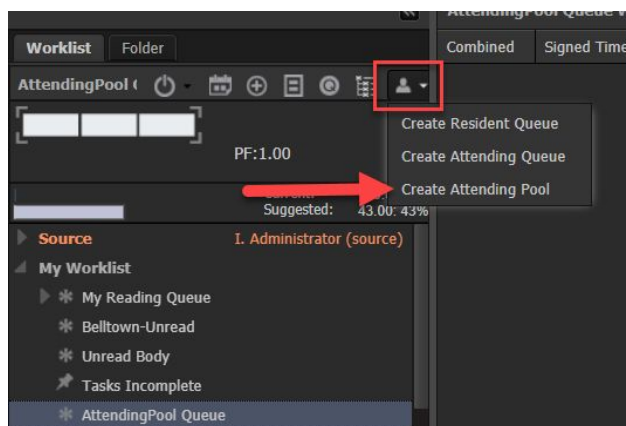


The attending radiologist is then able to read the exams in the worklists.

Creating the Attending Pool

If a resident chooses "NONE" as an attending radiologist, all of his or her exams will be entered into the Attending Pool. An Attending Radiologist can then create an Attending Pool to view all of these exams.

The Attending Pool is created exactly like the Attending Queue as seen above. By selecting the icon, and then selecting Create Attending Pool, the user will then have the "Attending Pool Queue" appear in their "My Worklists".

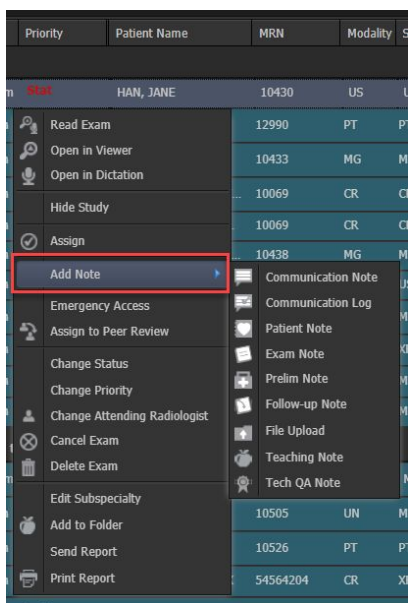


Notes workflow:

You have the ability to input many different note types within the Clario Smart Worklist. This section will review all of the different note options. The note options you see on your worklist is dependent on the note types your practice decided to deploy.

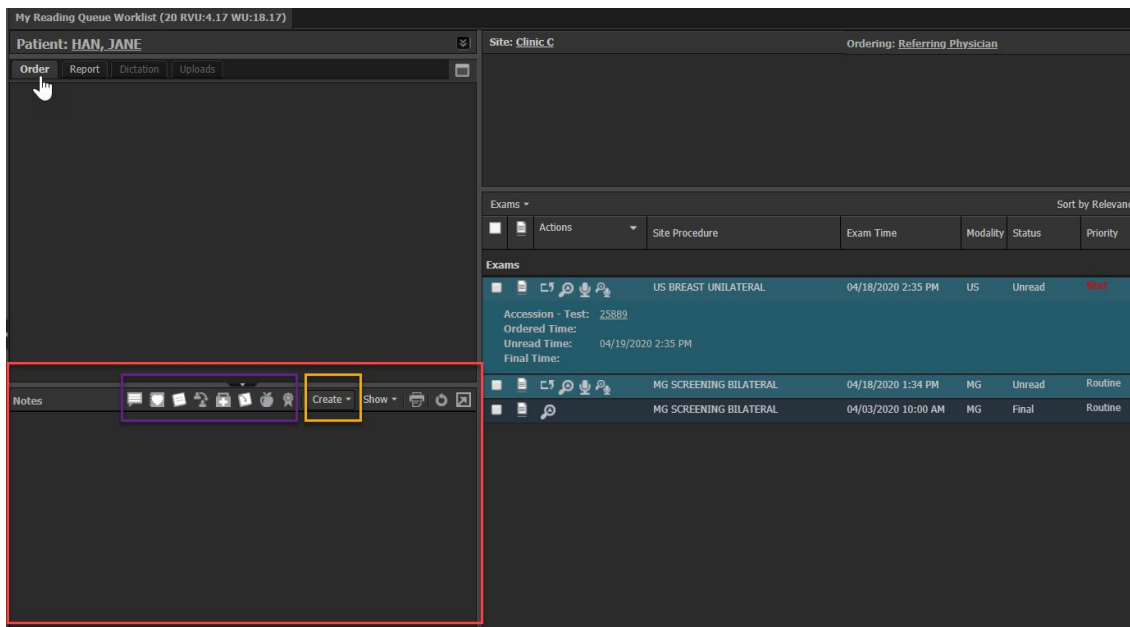
You can input any of these note types from two locations:

1. Right click from the worklist - If you right click on any exam on your worklist, you will see a list of options, based on the permissions that your group has set up for you. Hover over the “Add Note” option and another list will appear to the right. From that list, you can select the note type you would like to input.



2. Patient View - When you single click on an exam, or launch an exam to read, you will see patient view for that exam. Within patient view, you will see a notes panel, where you can input notes for that exam. Your practice will set up single click icons, in the purple box, for the note types you use the most often. You can still get to all other note types by clicking the “Create” button. This panel is where

you will see all of the notes associated with that exam.



Communication Notes

The most commonly used note within the Smart Worklist is the communication note. This note can be utilized to communicate different issues with exams. For example, if there is an exam with missing images, you can input a note with that message and the exam can then go to someone on your operations team to triage. Your practice can also configure your worklists in a way that removes the exam from your worklist until the problem is resolved. In our current example, the exam would not come back to your worklist until all of the images are received.

To input a communication note, use the right click option from the worklist, or select the communication note icon in patient view.



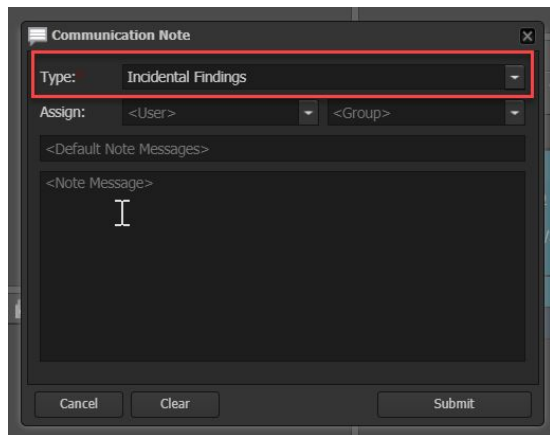
You will then see the communication note dialog box. From this box, you will first need to select a communication note type. The list of types is defined by your practice.

Next, if applicable, select a user or a group that this note should be assigned to. Your practice will define the note workflow and let you know if you need to pick an assignment group or not.

Next, if applicable, select a default note message. This list is defined by your practice.

Next, input a note message, if necessary, that describes the issue with the exam.

Finally, submit the note.

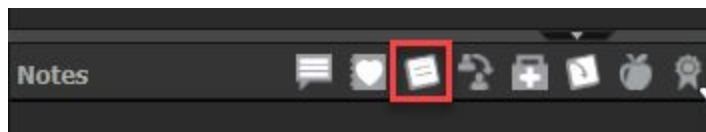


Once you have submitted the note, you can move on to reading a different exam, while your operations team address the issue within your note.

Exam Note

An exam note is a note that contains exam specific information. For example, you could input an exam note if you need to change the priority of the exam for a particular reason.

To input an exam note, use the right click option from the worklist, or select the exam note icon in patient view.



Next, select an exam note type. This list of exam note types is managed by your team.

Next, you can make the exam note public or private.

Next, select a default note message, if applicable.

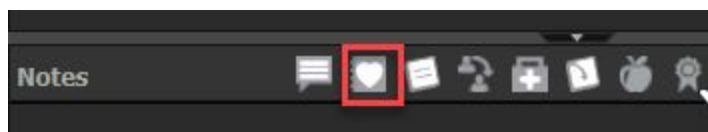
Next, input a note message, if necessary, that describes the issue with the exam.

Finally, submit the note.

Patient Note

A patient note is a note that contains patient specific information. This note will display for all exams completed for that patient.

To input a patient note, use the right click option from the worklist, or select the patient note icon in patient view.



Next, select a patient note type. This list of patient note types is managed by your team.

Next, you can make the patient note public or private.

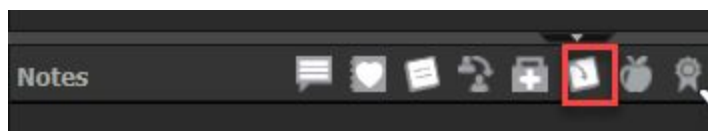
Next, input a note message, if necessary, that describes the patient information you would like to track.

Finally, submit the note.

Follow Up Note

Your practice can use follow up notes to track follow up appointment needs, such as diagnostic breast follow ups.

To input a follow up note, use the right click option from the worklist, or select the follow up note icon in patient view.



Next, select the desired date of the follow up and type in a note message regarding what type of follow up needs to occur.

Finally, submit the note.

Follow-up Note

Due Date:

<Note Message>

April 2020

S	M	T	W	T	F	S
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	1	2
3	4	5	6	7	8	9

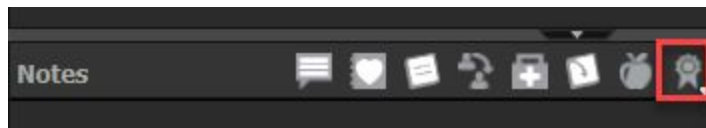
Today

Cancel Clear Submit

Tech QA Note

Your practice can use tech QA notes to track technologist quality.

To input a tech QA note, use the right click option from the worklist, or select the tech QA note icon in patient view.



The tech QA note will be customized based on the modality of the exam. Your practice can configure different rating systems, based on each modality.

Select the rating you would like to give this technologist.

Next, add a note message describing the reasoning for your rating.

Finally, submit the note.

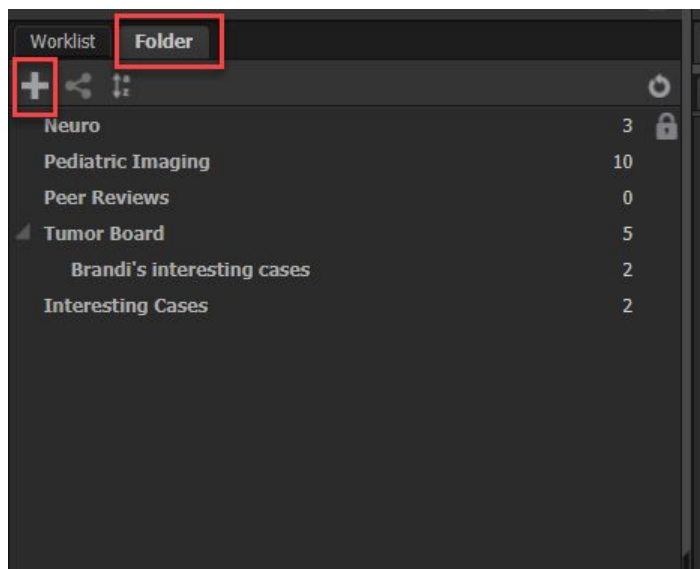
Folder workflow:

You have the ability to track exams in folders within the Smart Worklist. This feature is commonly used for tracking interesting cases, cases for tumor board, or cases for peer learning.

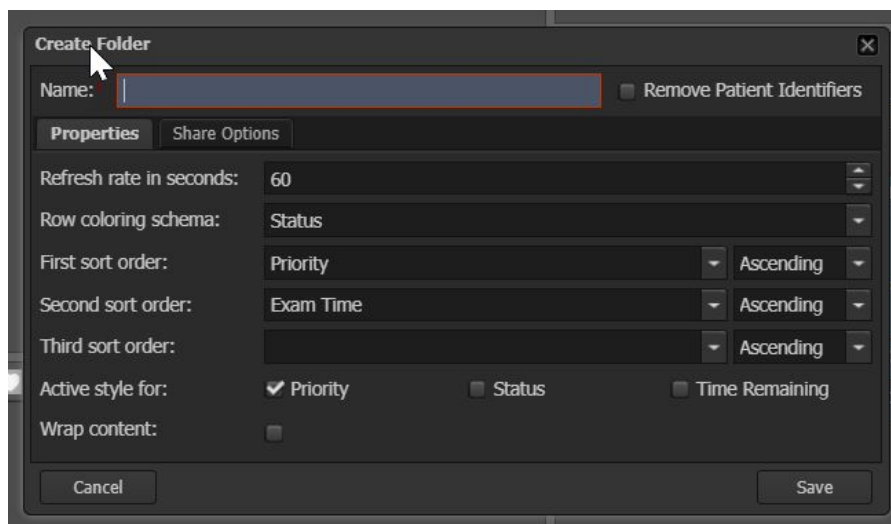
First, you will need to create your folder.

How to create a folder

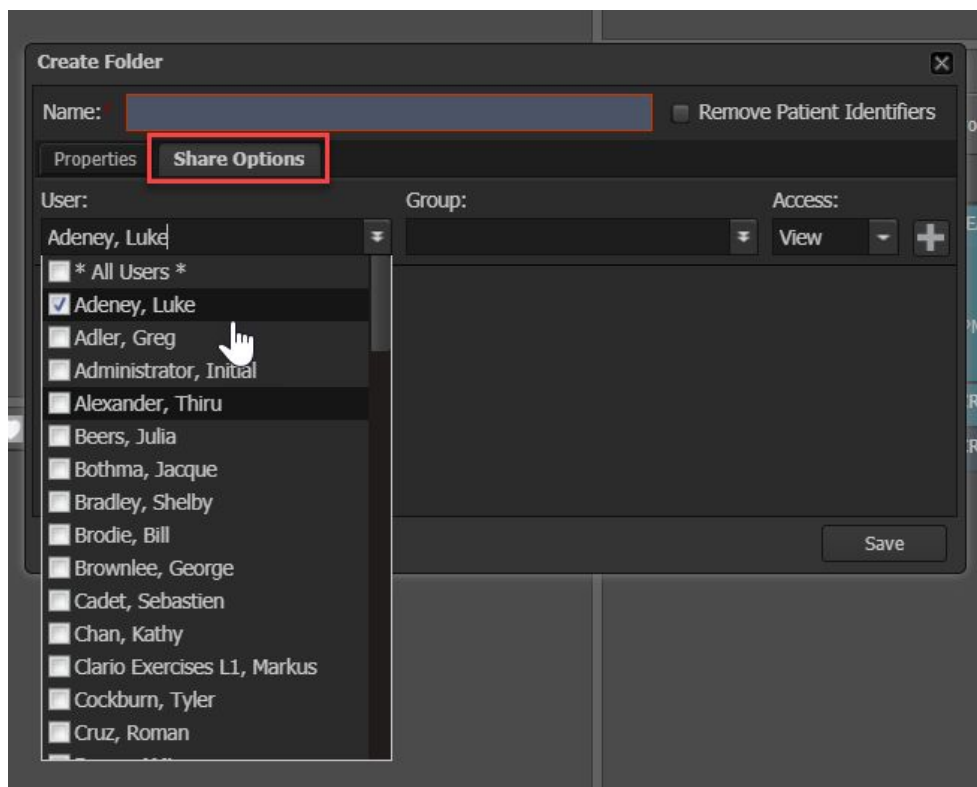
To create a folder, go to the Folder tab, next to the worklist tab, and click on the “+” icon.



Next, give your folder a name and select any desired properties for that folder.

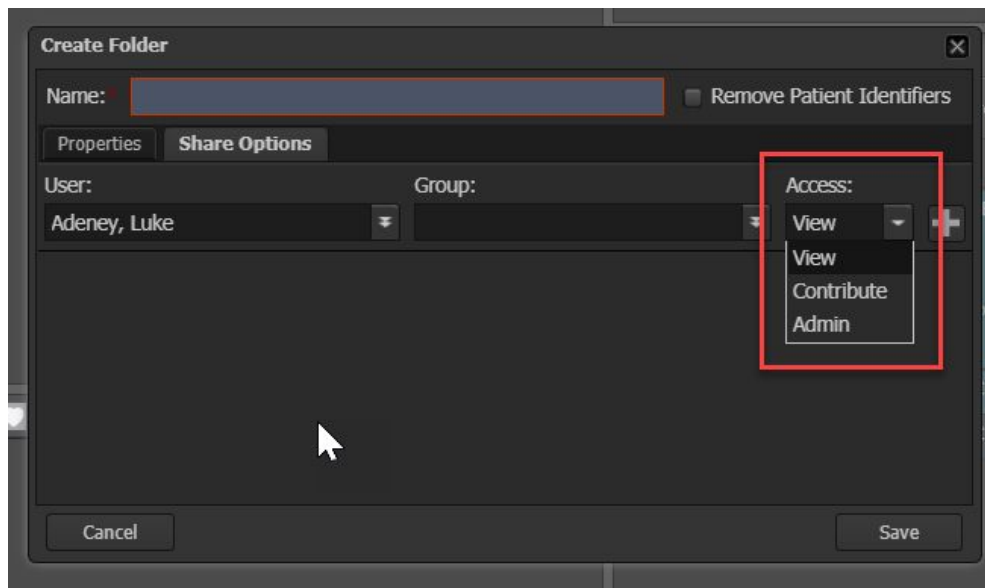


Next, if you would like to share your folder with other users, go to the “share options” tab. You can select a particular user or group of users with which you would like to share this folder.

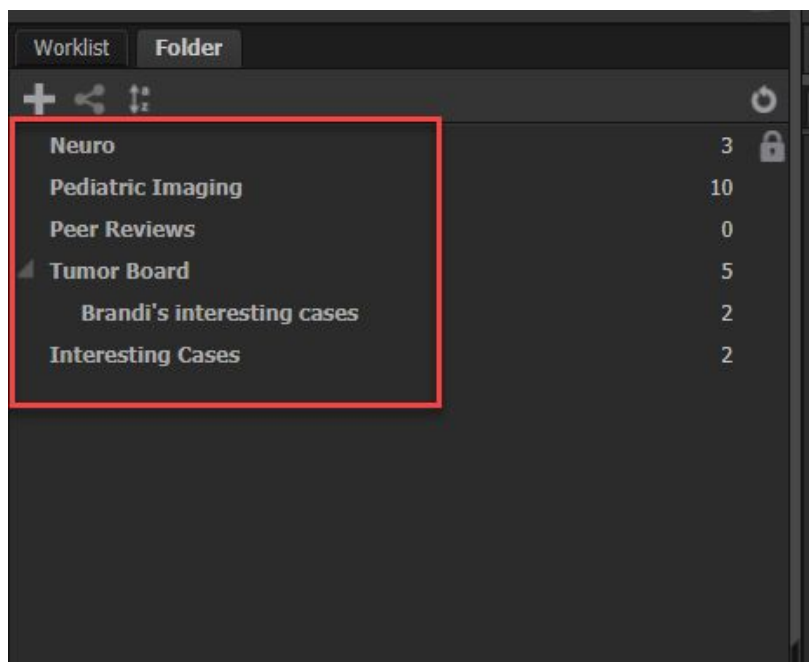


Next, you must decide which type of share access to give this user or group of users.

- If you give them “view” access, they will be able to see the folder and the cases within the folder.
- If you give them “contribute” access, they will be able to add cases to the folder.
- If you give them “admin” access, they add cases to the folder and edit any of the properties.



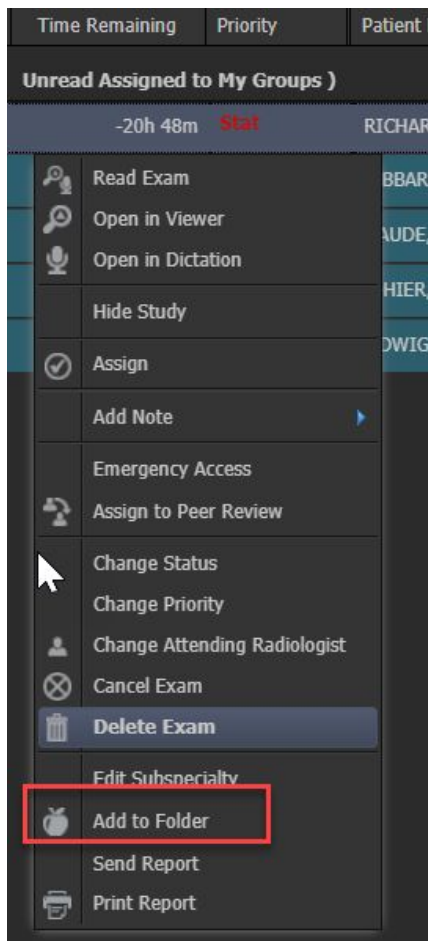
Next, click the “+” button next to the access menu and hit save. You will now see this folder listed with your other folders in your folders tab.



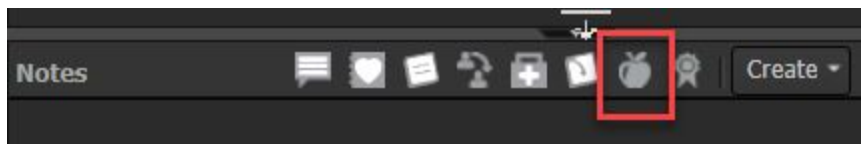
How to add an exam to a folder

There are two ways for you to add an exam to a folder.

1. Right click menu - Right click an exam on your worklist and select “Add to Folder”.



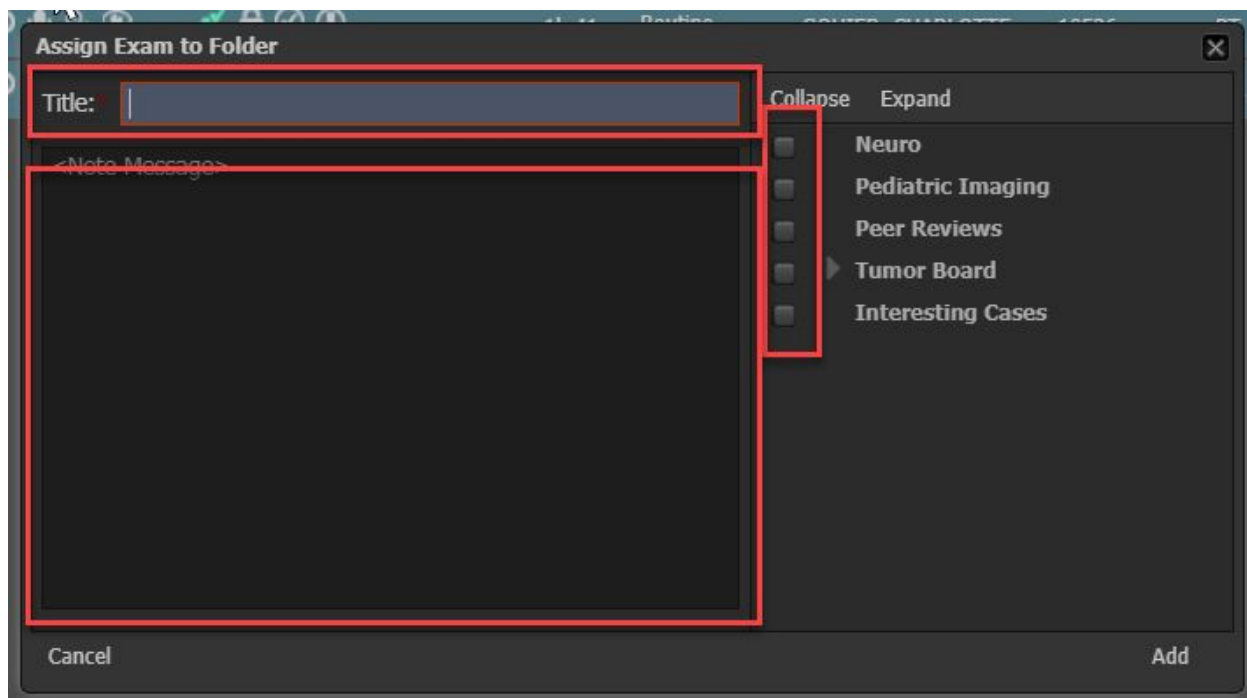
2. Patient view - Within the notes section in patient view, you can add a “teaching note” to an exam. Select the teaching note icon within the notes panel of patient view.



Once you have selected “add to folder” from the right click menu or selected the teaching note icon in patient view, you will be presented with the below dialog box. From this box, you will need to add a title and a note message that describes why you are adding this exam to the folder.

Next, select the folder you would like to add the exam to, by checking the appropriate box on the right.

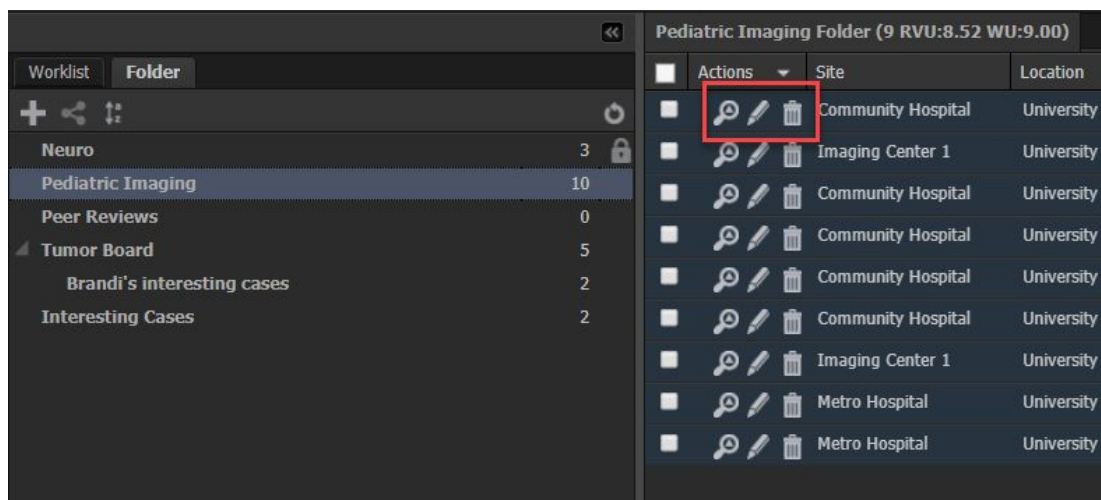
Finally, select “add”. This exam will now be in the selected folder.



How to manage an exam within your folder

Once you have created folders and added cases to folders, you can remove exams from folders by going to that folder and selecting the trash can icon.

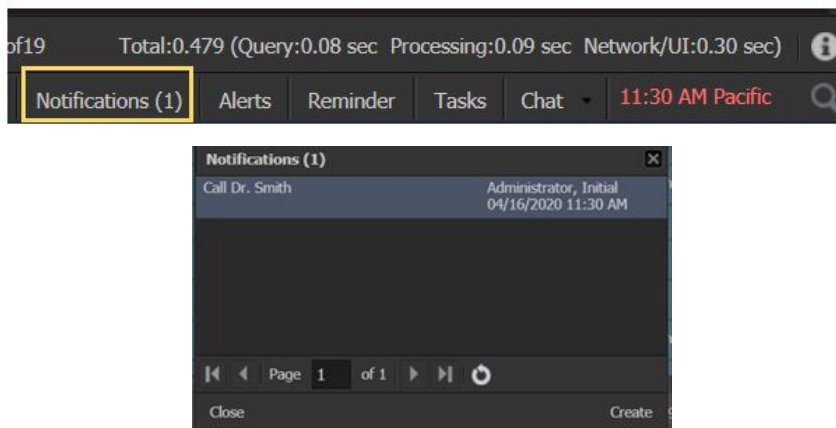
You can also launch the exam from this same actions column and use the pencil icon to edit the teaching note.



Notifications and Alerts:

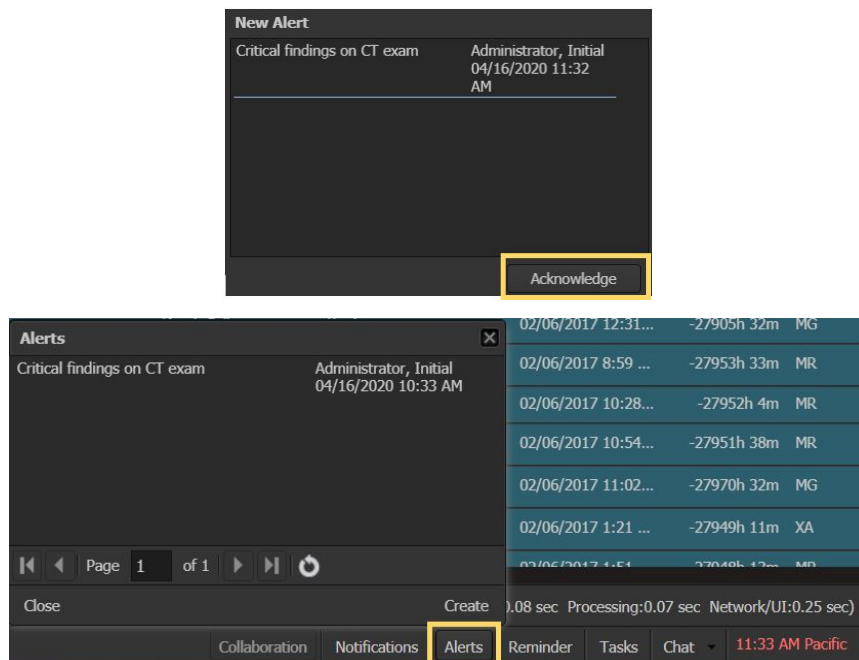
Notifications

Notifications do not disrupt the radiologist's workflow and are often not time sensitive, as shown in the example below. These notifications are stored in the lower right hand corner of Clario. If a user has unread notifications- a number will be presented next to the word notifications. Click on notifications - a window will appear containing the users notifications.



Alerts

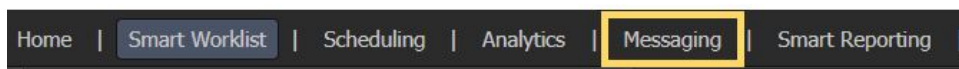
Alerts will act as pop ups and stop radiologist mid-work. These must be acknowledged before the radiologist can continue reading. Alerts should be used for time sensitive situations, as shown in the example below. These alerts will also be stored in the lower right hand corner of Clario.



Messaging

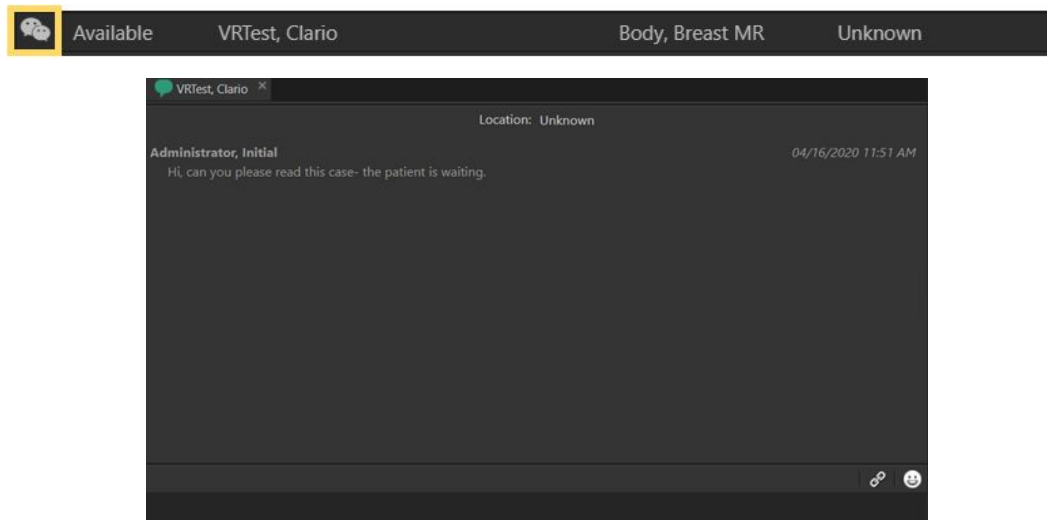
In order to utilize messaging- users must have the “access to messaging” turned on under the user role permissions.

To use the function of messaging- users will need to click the word ‘messaging’ located on the top right corner of Clario. Once this is click, a new page will appear containing the messaging system. This system is used as a communication tool between users who have the permission turned on.



To start a conversation with another Clario user- click the icon (messaging bubbles) to the left of the selected user’s status. This will open the talk window- this window contains multiple talk sessions for the user. Click on each individual's name in order to see the message history or to continue messaging.

Please note that the pop up blocker must be disabled in order to allow the talk window to appear.



Claro Smart Reporting

This portion of the training packet will focus on radiologists usage of Claro Smart Reporting. All patient data shown within this training packet is fake patient data within our demo system.

Clario Smart Reporting Radiologist Training Checklist

Scope:

This document provides a generalized guideline of basic radiologist training for Clario Smart Reporting. You can copy this portion of the document and use it as a checklist for your radiologist training.

Items to Review

1. Before Logging In

- a. Ensure microphone is plugged in
- b. If using Inteleviewer, ensure link between IV and any other dictation system is disabled
- c. Ensure the mic you are not using is unplugged

2. Logging In

- a. Ensure web launching is enabled in user management
- b. Download zvextender
- c. See red dot to know that VR is active
- d. If using Powermic, ensure the nuance extension is running

3. User Preferences

- a. How to manage speech configuration
- b. How to configure compare action

4. Show Nuance Speech Control

- a. Enable press-and-hold
- b. Manage vocabulary

5. How to Read an Exam

- a. How to launch a case
- b. Choosing templates
- c. Selecting a favorite template
- d. Select template structure level
- e. Select macros and fields
- f. Review voice commands
- g. Formatting options
- h. How to discard

- i. How to cancel
- j. How to sign
- k. How to pop out and pop in dictation window
- l. “Oops” Factor
- m. How to use compare action

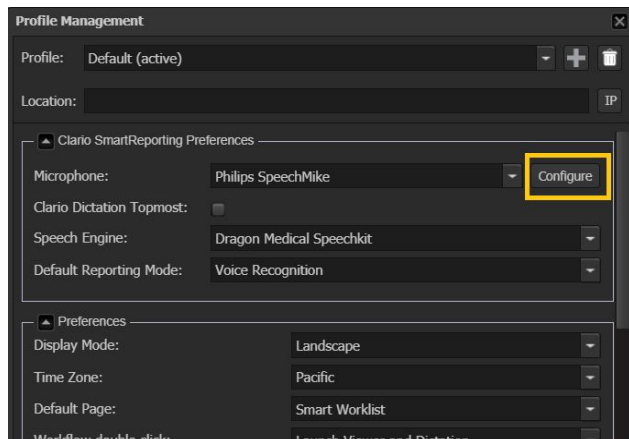
How to manage your microphone

In version 3.9, Clario Smart Reporting supports the use of microphones from Phillips, Nuance and Olympus. The use of USB headsets is also possible.

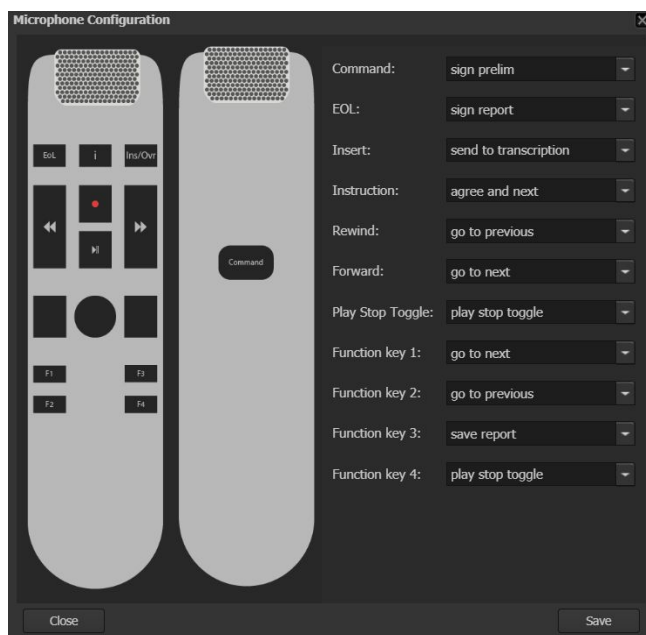
The following configuration options only apply for Phillips Speechmike.

When using a compatible Phillips Speechmike, it is possible to configure the handset buttons to perform different commands, according to the user's preference.

The configuration options can be accessed by navigating to Profile Management, and selecting the "configure" option under Clario Smart Reporting Preferences



This will launch the Microphone Configuration window, where the user can assign specific commands to individual microphone buttons. Available options include functionality for signing or drafting a report, navigating between autotext fields, or navigating to search fields within the Smart Worklist.



Smart Reporting specific user preferences

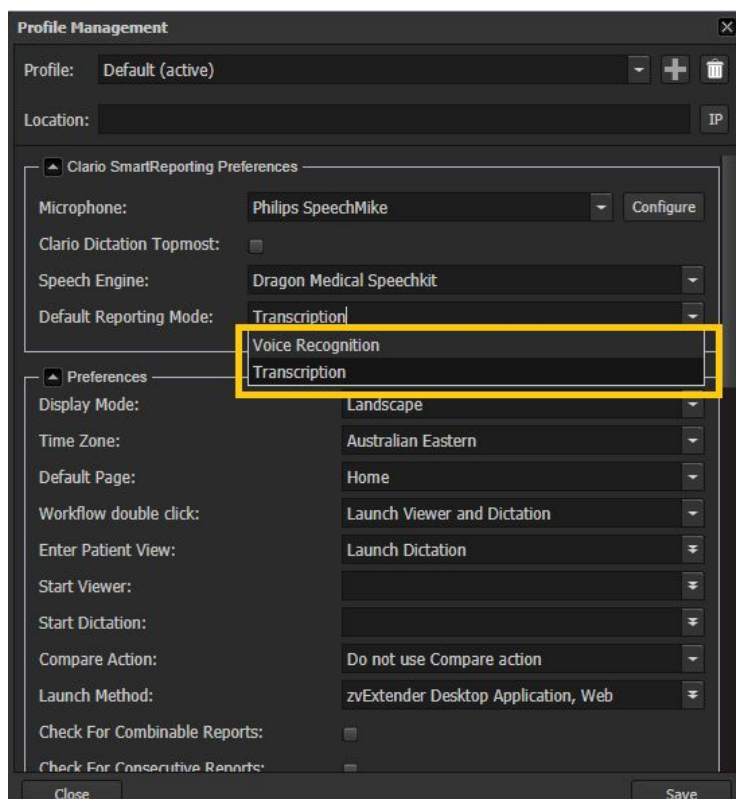
Smart Reporting User Preferences are located in the Profile Management tab

Clario Dictation Topmost

When checked, this user preference will keep the dictation window visible on screen as the user is dictating, regardless of what applications may have been opened in front of it.

Default Reporting Mode

If both voice recognition and transcription modes are enabled in Smart Reporting, the user can switch between modes under Profile Management. After changing modes, it is recommended that the user log out and in again before continuing to report.



Smart Reporting Speech Commands

The following commands are by default enabled for Smart Reporting. The Dictating Commands are used when dictating a report. Simply dictate the command in order for the associated action to initiate.

Additionally, there are commands that can be used when on worklists. Those are Worklist Commands and Notes Commands .

Dictating Commands

Action	Command
Select a template	"Load [name of template]"
Insert structured template	"Structured template"
Insert less structured template	"Less structured template"
Insert narrative template	"Narrative template"
Insert a macro	"Insert [name of macro]"
Select option from pick list	"Select [option]"
Begin a new line in the report	"New Line"
Go to a different field	"Go to 'field name'" ex. "Go to reason for study"
Save the report as a draft	"Save Report"
Finalize the report	"Sign Report"
Sign a prelim	"Sign Prelim"
Cancel any edits you were making to a draft or prelim	"Cancel Report"
Delete or discard your report	"Discard Report"
Delete your last statement	"Delete that"
Go to previous field	"Go to previous"
Go next field	"Go to next"
Agree to default text	"Agree"
Agree to default text and go to next field	"Agree and next "
Cancel the dialog	"Cancel"
Clear the dialog	"Clear"
Highlight your last statement	"Select that"
Highlight the entire report	"Select all"
Make text bold	"Format bold"
Make text italicized	"Format italics"
Make text underline text	"Format underline"
Add a superscript	"Format superscript"
Add a subscript	"Format subscript"
Strikethrough	"Format strikethrough"
Align left	"Format left"
Align right	"Format right"
Align center	"Format center"
Fit text to window	"Format justify"
Create bullet points	"Format bullets"
Create numbers	"Format numbering"

Indent a line	"Format indent"
Outdent a line	"Format outdent"
Add a template remark	"Add template remark"
Insert dates for today, yesterday, tomorrow and now	"date [date option]"
Save	"Save"
Save report	"Save report"
Submit dialog	"Submit"

Worklist Commands

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

Note Commands

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

How to use different template structure levels

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



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

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

STUDY DESCRIPTION
MR Abdomen w/o Contrast

COMPLETED DATE/TIME
04/01/2020 6:20 PM

REASON FOR STUDY
reason

COMPARISON

EXAM PARAMETERS
TECHNIQUE:
LIMITATIONS: None

FINDINGS
ESOPHAGUS: No structural or mechanical abnormality.
GALLBLADDER: No stones. Normal wall thickness. No pericholecystic fluid.
APPENDIX: Normal.

IMPRESSION

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

STUDY DESCRIPTION
MR Abdomen w/o Contrast

COMPLETED DATE/TIME
04/01/2020 6:20 PM

REASON FOR STUDY
reason

COMPARISON

EXAM PARAMETERS
TECHNIQUE:
LIMITATIONS:

FINDINGS
ESOPHAGUS:
GALLBLADDER:
APPENDIX:

IMPRESSION

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

STUDY DESCRIPTION
MR Abdomen w/o Contrast

COMPLETED DATE/TIME

REASON FOR STUDY
reason

COMPARISON

EXAM PARAMETERS

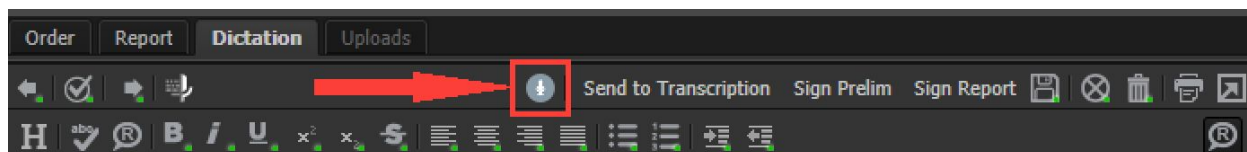
FINDINGS

IMPRESSION

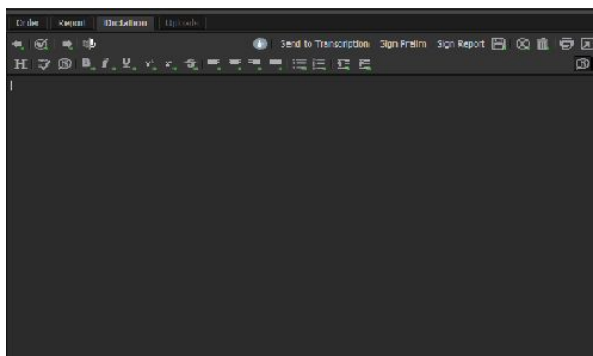
How to use transcription mode

Transcription mode allows the user to record and save a voice file of their dictated report for transcription by a typist. Once transcribed, the report is available for review and approval.

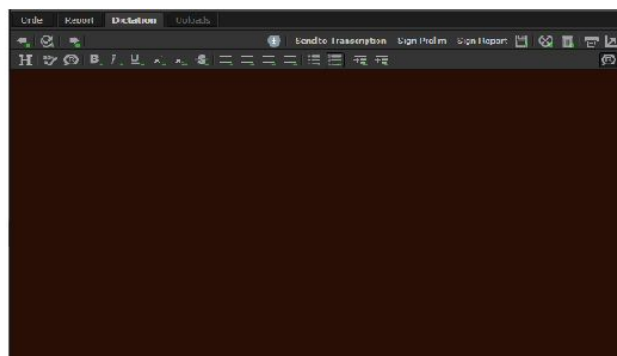
To start recording a dictation in transcription mode the user can use a configured button on their microphone, or click the Start Recording button on screen



The background of the dictation workspace will change to a darker colour to indicate that the microphone is active and audio is being recorded. *Please note that the recording time indicator will only update once the recording is stopped.*



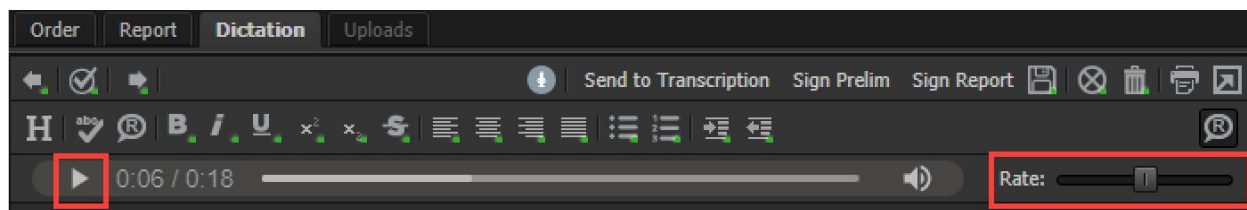
Microphone is idle



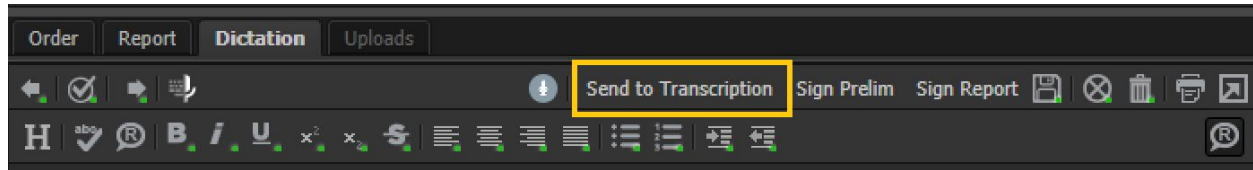
Microphone is active

The recording can be stopped by using the microphone, or the Start Recording Button on screen. The recording time indicator will then appear or be updated.

The dictation can be reviewed, and added to, and the playback speed and volume can also be adjusted.

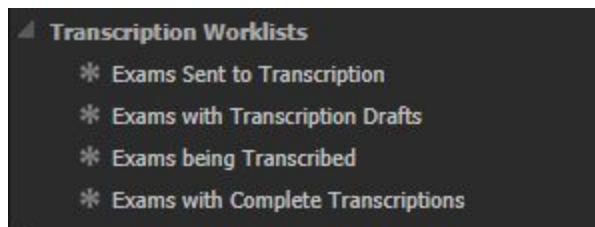


To submit a dictation for transcription, select the Send to Transcription button on screen (or a pre-configured microphone button)



Accessing Transcription Worklists

If changes need to be made to a dictation after it has been submitted for transcription, the History Search will allow the user to quickly locate recently viewed exams. Provided the administrators have allowed access to the Transcription worklist the exam could also be retrieved from the Exams Sent to Transcription worklist

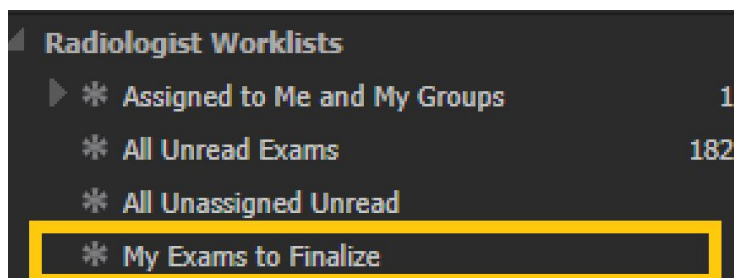


The exams on this worklist can be opened for editing, and resubmitted for transcription.

Once an exam is opened by the typist and transcription is underway the dictation can no longer be edited.

Signing Worklists

After a dictated report has been transcribed and is ready for approval, it will be available for signature in the My Exams to Finalize worklist



Please note: depending on the configuration of the specific organisation's worklists, the signing worklist may be found under My Reading Queue, and may have a customised worklist name.

