



Philips Radiology Information System

Desktop System User Guide

Confidential

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Intended Use and Safety

Intended Use

Philips RIS is an information management system, whose intended use is to provide all those who participate in the radiology care and related services, the ability to access the clinical data they need and manage the radiology workflow, from referral order creation to diagnostic report distribution, or a sub-set of the end-to-end workflow.

It serves hospitals and other radiology imaging providers, which enter, store, view, manage, and transmit patient and exam related data. Philips RIS can interface with other software operating in the healthcare organization for data streaming.

The system is to be used by trained professionals including, but not limited to, referring physicians, clerks, medical technicians and radiologists. In addition, some of the system functionalities are used by patients up front.

Who Should Use This Product

All relevant personnel within the radiology department, including schedulers, receptionists, technicians, and radiologists or any other resource who is related to the radiology department.

Safety Disclaimer

As Philips RIS has powerful, configurable functionality, you must ensure that the software is used appropriately:

- Philips RIS lets users capture and insert data from other applications into a diagnostic report.
- This tool is **not intended** to capture radiological images for diagnostic use.
- Philips RIS does not provide encryption for emails. If confidential information or protected patient information is included in an email, you must ensure that encryption is available for your facility.
- You can set up scheduling rules for your site. Alerts are only available when you (or service personnel) set up the scheduling rules. You must ensure that the scheduling rules reflect the desired criteria. Verify the results after you have configured the scheduling rules.
- Creation or alteration of clinical values is prohibited; in addition there shall be no support by Philips personnel to create such calculations.
- This product must be installed, maintained, and serviced according to maintenance procedures by Philips HCIS personnel, or other qualified maintenance personnel approved in writing.
- The system, in whole or in any part, may not be modified in any way without prior written approval from the manufacturer.
- Unauthorized personnel must be prevented from accessing the system.
- If the system does not operate properly, or if it fails to respond to the controls described in this manual, contact the nearest field service office to report the incident and await further instructions.

- The images and tools provided by this system are intended as tools for the competent user only. They are explicitly not to be regarded as a sole incontrovertible basis for clinical diagnoses. Operators are encouraged to study the literature and reach their own professional conclusions regarding the utility of the system.
- The user must be aware of the product specifications and of the system accuracy and limitations. These limitations must be considered before making a decision based on quantitative values. When in doubt, consult the nearest field service office.

Warning and Caution Indications



WARNING

Warnings are directions, which if not followed, could cause harm to a user, patient or other person, or could lead to a misinterpretation, and/or loss/damage of patient related data.



CAUTION

Cautions are directions, which if not followed, could cause damage to the equipment described in this Instructions for Use and/or any other equipment or goods, and/or cause environmental pollution.

General Limitations of Use



WARNING

Do not use Philips RIS for any application until you have received adequate and proper training in its safe and effective operation. If you are unsure of your ability to operate this equipment safely and effectively DO NOT USE IT.



WARNING

Philips RIS must be operated in an environment where the minimum specified requirements for hardware and network performance are met.



WARNING

Do not use Philips RIS for any purpose other than those for which it is intended.



WARNING

When running Philips RIS Client with a virtualization solution (Citrix XenDesktop®), a degradation in image quality, as well as skipped frames, may occur, based on the network bandwidth and virtual machine configuration.



WARNING

Before the study is closed, verify that images are copied or backed up successfully.



WARNING

Before the study is deleted, verify that images are copied, archived or backed up successfully.



WARNING

Be careful when editing the Report. In some parts of the report it is possible to change the information created automatically.



WARNING

Make sure that you are using appropriate monitors, and that they are properly configured.



WARNING

Never switch the IT equipment off using the POWER ON/OFF switch while the software product is still running, as this may damage data integrity, which can lead to loss/damage of patient-related data. Always exit the software product before switching off the IT equipment.



WARNING

Do not install unsupported software on Philips RIS system as this could interfere with diagnosis/interpretation, and/or cause loss of or damage to patient-related data, and/or introduce computer viruses.



WARNING

Hardware Characteristics, resolution settings, and viewing environment all affect the displayed image quality. It is the responsibility of the user to ensure that the displayed image quality is fit for purpose. Incorrect monitor setup can lead to misdiagnosis/misinterpretation. Check the display performance regularly.

Contents

Intended Use and Safety	iii
General	1
About RIS and PACS	1
Basic Concepts	3
Roles	3
Workflows	4
Patient Statuses	5
Worklists	8
Worklist Components	9
Optimize the Worklist to Your Preferences	12
Customize the User Interface	12
Select a Viewing Mode	14
Arrange the Worklist Columns	15
Split a Window	19
Make More Screen Space for the Worklist	20
Working with Filters	20
Filter by Text	21
Filter for Specific Information	21
View Filtered Columns	22
Remove a Filter	23
Remove All Filters	23
Working with Flags	23
Work with Flag Options	24
Save Your Worklist Customizations	29
Save MyViews	29
Update MyView	29
Additional Common Features	30
Perform a Patient Search	30
Refresh the Worklist	31
Set Double-Click Actions	31
Work with Transaction History	31
Work with the Patient Log	32
RIS Layouts	33
Data Windows	37
Getting Started	38
Log On	38
Switch Between Roles	38
Use Worklists	39

Log Out	39
Close RIS	39
Share a Workstation / Switch User	39
Switch Between Worklists for Different Areas	40
Scheduling	42
The Schedule Form	42
Access the Schedule Form	43
Schedule Form Components	43
Edit Procedure Details	47
Exam Statuses upon Completion of Scheduling	49
Automatic Adjustment of the Schedule Form to Specific Actions	49
Schedule Appointments	50
Use the Procedure Picker	51
Procedure Picker Window Components	51
Study Filters	53
Use Advanced Settings	56
Set Time and Availability Filters	57
Hide/Show Modalities	58
Automatic Scheduling	59
Modality Priority	60
Delaying a Search	60
Resource Scheduling	60
Indication of Requested Resources	61
Indication of Scheduled Resources	61
Add Resources Manually	62
Change Scheduled Resources	63
Define Resource Groups	64
Manual Scheduling	65
Manage Proposed Bookings	66
Manage Active Appointments	66
Manage Non-Active Appointments	67
Preparation Time	67
Preparation Time Calculation	68
Duration Modifier	69
Save Calendar Views as MyViews	70
View Modality Utilization	71
View Modality Availability	72
Schedule Walk-In Patients	72
User Preferences	73
Documenting	78
The Document Form	78
Access the Document Form	78
Document Form Components	81
Perform Document Together Actions	83
Add a Procedure to an Exam in the Performed Procedures List	83

Change an Exam in the Performed Procedures List	85
Add an Exam to the List of Documented Exams	87
Complete the Document Together Operation	89
 Acronym List	 90
 Symbols Glossary	 91

General

Philips Radiology Information System streamlines workflow within a Radiology Department by managing every step of a patient's journey through order receipt, scheduling, registration, examination, documentation, dictation, transcription, report distribution, and billing.

See:

[Basic Concepts](#)

[Worklists](#)

[Getting Started](#)

[Scheduling](#)

[Documenting](#)

NOTE: In the context of this document, the product name (Radiology Information System) may be referred to as RIS.

About RIS and PACS

About RIS

Philips RIS, a workflow management solution, is designed to improve productivity, efficiency, and information accuracy in diagnostic imaging departments, ultimately improving patient care. Below are some of the ways that RIS optimizes the radiology workflow:

- Enables the Radiology Department to schedule and manage exams
- Facilitates dictation via voice recognition and transcription
- Provides capabilities for reporting and results distribution
- Captures signatures electronically
- Manages inventory levels
- Transmits exam data electronically
- Prints patient letters specific to various types of exams
- Enables mammography reporting

- Manages film tracking
- Enables integration into existing financial systems

Philips RIS can be customized to meet the unique operational requirements of your hospital specialty, patient medical condition, or specific departmental workflow.

About PACS

A Picture Archive & Communication System (PACS) is an image management system that allows radiology departments and imaging clinics to store, retrieve, review, diagnose, and distribute large volumes of medical images. PACS coupled with RIS provides a fully integrated PACS/RIS solution.

Philips RIS and PACS together

The unified solution of Philips RIS and PACS provide all the tools you need to obtain optimal speed and efficiency with no compromise in data accuracy or patient care. The full solution automates diagnostic workflow and enables efficient creation, storage and distribution of the patient's complete radiology record. It provides diagnostic quality review of exam images - complemented by display of patient information - so radiologists can quickly consult a patient's complete clinical status for fast, accurate exam interpretations.

Basic Concepts

Some of the basic concepts in the Philips RIS system include:

[Roles](#)

[Workflows](#)

[Patient Statuses](#)

[Worklists](#)

[Layouts](#)

[Data Windows](#)

Roles

A role is a specific job function within the department. The functionality and workflow of Philips RIS is based on roles. The system administrator at your site will assign you to a role that ties in to your user account. Once assigned to a role, the RIS software only displays the relevant features and choices for your job function. The table provides an overview of each role and who might typically be assigned to each role.

NOTE: Some users might be assigned to more than one role.

Role	Who?	What?
Administration	Department heads and RIS administrators in the Radiology department	Set up and maintain user accounts, define system settings and site-specific customization
Scheduling	Schedulers for the Radiology department	Schedule exams, handle incoming pending orders, handle registration, manage the worklist, handle confirmation, manage technical documentation for all studies and examinations
Film Maker	Film Managers, Film Clerks; personnel managing the film for the site	Manage the physical location of film, handle film loans and returns

Role	Who?	What?
Reception	Radiology department personnel who interact with patients (front desk)	Check in patients, work with insurance and validate patient information
Technologist	Technologists who perform examinations to create images for diagnoses	Prepare completed images and documentation for the Radiologist reading process
Radiologist	Radiologists, Radiographers, and Radiology Assistants	Complete Diagnostic Reports
Transcriptionist	Transcriptionists	Transcribe recorded dictations and create reports
Referring	Users in the referring community who are waiting for results from the Radiology department to begin the Care Plan for a patient	Create orders, monitor status, read diagnostic results
Nurse	Nurses who confirm patient appointments	Confirm exam information, schedule details, and medical history with patients

Workflows

Philips RIS supports and is integrated into your site's workflow.

The following describes a common scenario that might be similar to the workflow at your site. The steps of the workflow are recorded, tracked, and enabled in RIS using worklists and statuses.

NOTE: See [Worklists](#) for in-depth information about working with worklists.

- Orders can come into the inbox electronically through RIS or from another system (typically a HIS) via HL7 or EDI.
- An order from the inbox is scheduled to be performed at a modality.
- The PACS is notified (via DICOM) of the examination so relevant priors can be fetched or analog films are fetched from the film archive for review.
- A patient letter may be created for an out-patient, to inform the patient about the scheduled examination and how to prepare for the exam.
- When the patient arrives in the X-ray department, the arrival is registered.
- Billing activities may be performed (country/site specific).

- The staff at the modality greets the patient and performs the examination. Information is registered such as who performed the exam, what contrast material was used, what inventory items were used, etc.
- When the exam is complete, it is now ready for reading (dictation).
- The radiologist reads the examination from a worklist of exams that are available for reading. If the radiologist is working on an integrated workstation then the images automatically display when the radiologist selects the exam for reading in RIS.
- The dictation can optionally be submitted for speech recognition by NUANCE SPEECHMAGIC.
- If online recognition is used then the radiologist can complete the transcription. If batch recognition is used then the transcription needs to be completed by the transcriptionist.
- The transcriptionist works from a worklist of examinations that need to be transcribed. If a recognized text from SPEECHMAGIC exists, the transcriptionist can select that text and compare it to the dictation; otherwise the transcriptionist listens to the dictation and transcribes it.
- The report is now ready to be signed by qualified radiologists. RIS supports from zero to three signatures. The reports are signed electronically by radiologists that select them from a worklist of reports that need signing.

NOTE: On an integrated PACS/RIS workstation, the images are automatically displayed when a report that needs signing is brought up.

- Once signing is complete, the exam is approved. The report may be sent automatically to a referring party. If the report is not sent electronically, then it needs to be printed and sent to the referring party. When the report is approved, the examination is in many cases cleared for billing and an HL7 message with billing information may be sent to the HIS.

Patient Statuses

The patient record is always associated with a status. The status lets you (and other personnel at your site) track the patient/exam through the workflow. The following is an example - you can have as many or as few statuses and workflows that make sense for your work area. There is a set of default statuses with the standard RIS software, and your system administrator can add or remove as appropriate for your site.

As the patient moves through the workflow and changes statuses with each step, all information that anyone enters in RIS is only entered once. All information stays with the order, and accessible to you, throughout the workflow.

Status	Who might assign it?	What does it mean?
Scheduled	Scheduler	This status begins the patient journey through the Radiology department. The patient has pre-scheduled the appointment, but has not yet arrived.

Status	Who might assign it?	What does it mean?
Arrived	Receptionist, Registrar	The patient has arrived at the front desk. The front desk staff changes the status to Arrived and provides the patient with any necessary paperwork to complete before the exam. This status lets you capture your patient wait time.
In Progress	Technologist	After the technologist has greeted the patient and begins the exam, they manually changes the status to In Progress.
Exam Done	Technologist	After the technologist has completed the exam and finalized documentation of the exam on the screens and protocol tabs in RIS, the technologist changes the patient status to Exam Done. The patient is now ready for the radiologist to read the exam.
Dictated	Radiologist	After the radiologist has read and dictated the report, the status automatically changes to Dictated. The report is now ready for the transcriptionist to type. If reports are linked, the linked reports have a status of Linked and only the main report has a status of Signed.
Transcribed	Transcriptionist	After the transcriptionist has typed the report, the status is changed to Transcribed. The report is now ready for the radiologist to review and modify or sign the transcribed report. For credentialing, a report can be signed twice. The first signature (Sign 1) changes the status to CoSign.
Approved, Signed	Radiologist	After the radiologist has reviewed and approved the transcribed report for accuracy, or if the report was a standard normal, the radiologist checks Sign 2 to automatically change the status to Signed.
Scheduled, Signed, Approved	Referring Physician	At the front end, the referring physician can enter a new patient, order an exam, and schedule the exam (using the Scheduled status). After the exam is complete, the referring physician can review and approve the report (Signed and Approved statuses).

Other possible status changes:

Status	Who might assign it?	What does it mean?
Discontinued	Technologist	The exam was started then stopped before completion. For example, the technologist determines that there is a contraindication during the exam, or the patient might be claustrophobic, uncomfortable, unwell, etc.
Cancelled	Reception, Referring, Scheduler	The exam is cancelled before it has started. When you change the status to Cancelled, a dialog box opens where you select the reason and type a note with more explanation if appropriate. Example reasons for the cancellation: Facility: The exam is cancelled due to the facility. An example is a contraindication determined at confirmation for insurance reasons or equipment failures. Patient: The exam is cancelled due to the patient. For example, the patient is ill. Referring Doctor: The exam is cancelled by the referring doctor. Not Done: The technologist determines that there is a contraindication. No Show: A patient does not arrive on the scheduled date / time of the exam. At end of day, the front desk staff changes all patients left on the worklist to No Show.
Rejected	Reception, Scheduler	Example reasons for the rejection: Holiday: The exam was scheduled on a holiday. Facility: The facility cannot take the patient.

Worklists

All users work with at least one of the RIS worklists. There are several types of worklists, and they are all based on patient exams. Each type of worklist functions in the same way. Each has a common set of features and views along with a wide variety of possibilities for customization by site and by user. The customization possibilities are intended to provide you with the optimal experience in efficiency and usability.

The worklists vary by the information that is included in each, but the way you use them is the same. This training guide will instruct you on the general use of the worklists and how to optimize them for your personal use.

While working in RIS, each type of user begins at a worklist for most tasks. The worklists are continually updated, and with your help, the worklists manage the patient's steps through the healthcare experience.

Interacting with a worklist

Depending on your role, you might interact with a worklist by entering or reviewing information (for example, information regarding the patient, the order, and the patient's health insurance), checking for patients that are ready for their exams, or checking for exams that are ready to be read, transcribed, or reviewed.

Some users will change the status of the patient when the patient is ready to move to the next stage in the workflow. In some cases, this status change causes the exam to leave one worklist and appear on a different worklist. Some common examples are below:

User	Worklist	Common Tasks
Schedulers	Ordered Worklist	Enter or locate patients and schedule the exams that have been ordered.
Nurses	Scheduled Worklist	Confirm the scheduled exam with the patients.
Film Managers	Scheduled Worklist	Fetch archived analog film from prior exams for the scheduled patients.
Receptionists	Scheduled Worklist	Track the list of today's exams and register patients as they arrive. Alert the technologists when a patient is ready for the examination.
Technologists	Tech Worklist	Track patients that are ready for their exams. Greet patients and perform the exams.

User	Worklist	Common Tasks
Radiologists	Exam Done, Justification, Protocol Required, Transcribed, Signed Worklists	Read the exams that have been performed by the technologists. Review the transcribed reports.
Transcriptionists	Dictated Worklist	Transcribe the reports that have been completed using voice recognition software.
Administrators	Signed Worklist	View all the completed exams.
Referring Physicians	Results, Critical Results, My Orders Worklists	Order an exam to be scheduled, schedule an exam, or review the completed exams for your patients.

See:

[Worklist components](#)

[Optimize the worklist to your preferences](#)

[Work with filters](#)

[Work with flags](#)

[Save your worklist customizations](#)

[Additional Common features](#)

Worklist Components

Date WL Scheduled: 23/11/2018

Page: 1

Patient Wait List

Signed 1 WL

Exam Done WL Page: 1

TEST, A

Patient ID: 9003354

Birth Date: 1/01/1970

Age: 48Years

Scheduled Date: 23/08/2018

Pacs SPS ID: 5002804319

Status: Exam Done

MR

Flags	Patient ID	Permission Level	Scheduled date	First name	Last Name	Study Description	Modality type
	9003354	0	23/08/2018	A	TEST	XRAY Neck	DX
	9003354	0	24/08/2018	A	TEST	CT Chest	CT
	9003354	0	24/08/2018	A	TEST	CT Abdomen a...	CT
	9003354	0	24/08/2018	A	TEST	CT Brain	CT
	9003354	0	24/08/2018	A	TEST	CT Ankle - Left	CT
	9003354	0	27/08/2018	A	TEST	XRAY Neck	DX
	9003354	0	27/08/2018	A	TEST	CT Brain	CT
	9003354	0	27/08/2018	A	TEST	CT Ankle - Left	CT
	TT9000039101	0	11/09/2018	Test Female	Test Female	CT Brain	CT
	TT9000039101	0	11/09/2018	Test Female	Test Female	CT Temporal B...	CT
	014	0	27/09/2018	Mike	Ross	CT Ankle - Left	CT
	0000001	0	12/10/2018	model	test	CT Cervical Spine	CT

	Description	Function
G	Navigation bar	Provides buttons to access most tasks. Most worklists have panels for Worklists, Patient, and Actions. You can drag and drop the navigation bar to any location on the user interface, or temporarily hide it to gain screen space. The navigation bar is interactive; buttons become disabled or enabled depending on where you are in the user interface, what you have selected, etc.
H	Inactive tab	Represents another worklist or task that you have opened or started. Click the tab to switch to the other worklist or task, or press Ctrl+Tab on your keyboard to move between tabs without clicking. To close the worklist or task, right-click the tab and select Close .
I	Active tab	The active tab identifies the activity or screen that displays (in the example above, the active screen is the Scheduled worklist). When you do another task, you can always return to the worklist by clicking the tab. You can have multiple tabs at the top of the screen - each tab represents a task that you can access at any time. To close the worklist, right-click the tab and select Close .
J	MyView bar	Displays your saved views. Click to change the worklist to display with the look and information that you previously saved.

11/09/2018	NN	2018-09-11 17...	TT90000...	Test Female	Test Female	N	32
27/09/2018	NN	2018-09-27 10...	014	Ross	Mike	N	13
12/10/2018	NY	2018-10-12 12...	0000001	27/01/2010 1...	test	model	N
13/11/2018	NN	2018-11-13 13...	16	harvey	spectre	N	

K

Rows 1 to 13, selected: 1 [total: 13]

Hover over each status indicator to view a tooltip, these indicate the worklists that are being monitored and provide an exam count.

	Description	Function
K	Status bar	Indicates RIS status, for example, "Retrieving Worklist." Provides the number of rows in the worklist. If filters are applied, the status bar lists the number of rows display and total, for example, '8 of 121 rows'.
L	Status indicators	Provide a visual indication of the worklists. RIS monitors the worklist counts and displays various icons when counts reach specific levels. The levels are configurable for your site.

Optimize the Worklist to Your Preferences

There are many ways to customize the worklist:

1. Your site administrator can customize the worklists on a facility-wide level to best fit the workflow.
2. Some users can save customized views for a group of users.
3. All users can:
 - Change the way the worklist appears on the screen or change the location of any of the information in the worklist.
 - Filter the worklist for the information you need most often.
 - Save the worklist the way you want it for quick access every time you log on. You can create and save multiple views, and save one as your default view (a default MyView).

See:

[Customize the user interface](#)

[Select a viewing mode](#)

[Arrange the worklist columns](#)

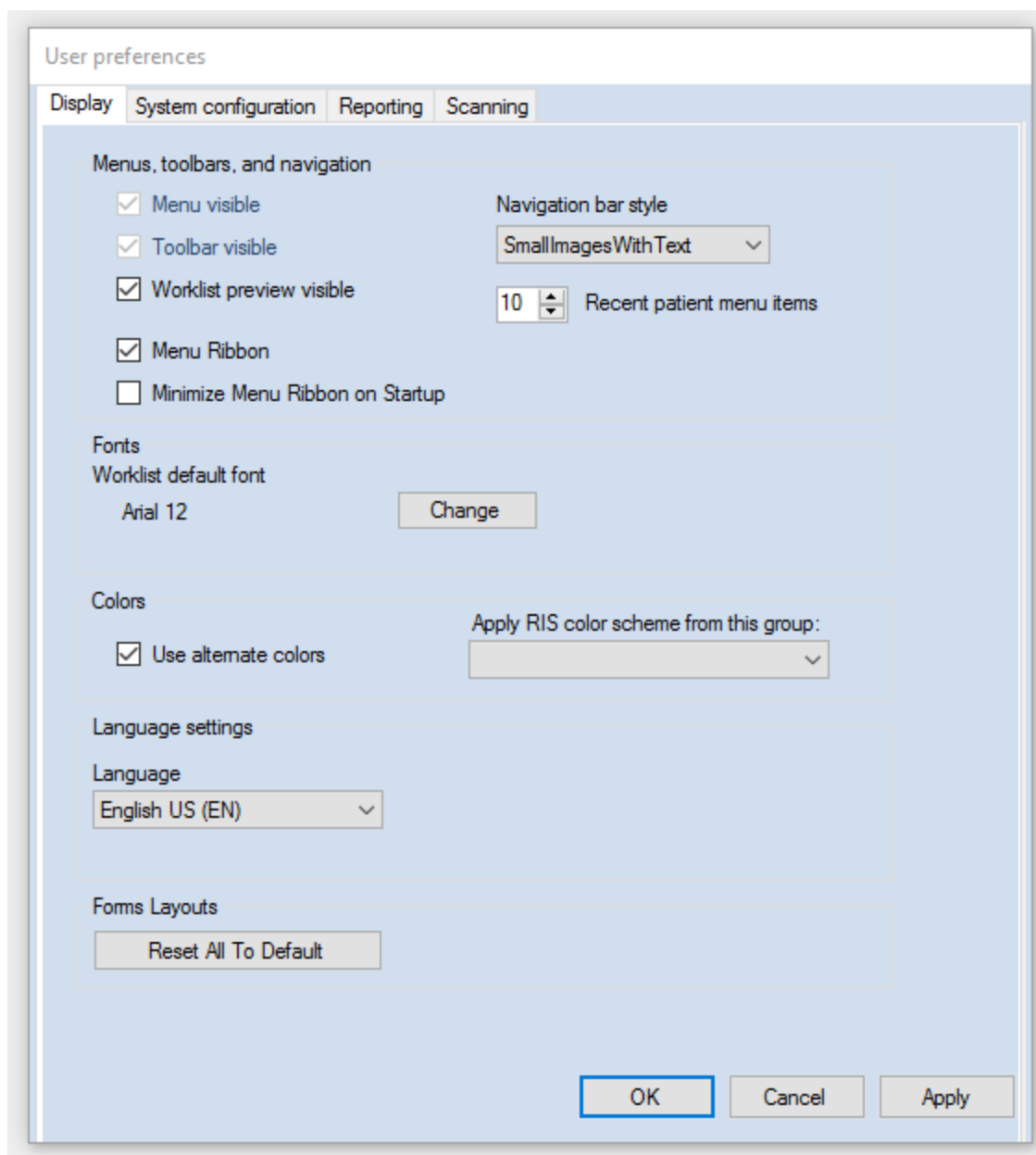
[Split a window](#)

[Make more screen space for the worklist](#)

Customize the User Interface

This training shows how to optimize your worklists. In addition to the worklists, the full user interface is customizable. Usually the system administrator customizes the user interface to optimize it for your site's workflow. Then you can decide how to work most effectively by making selections that only apply to your user account. Below is a quick overview of some of the possibilities.

1. Set up your system preferences. Once set up, the user interface appears the way you decided each time you log on. Select **Tools>User Preferences>Display** to customize your settings for the appearance of menus and toolbars, fonts in the worklist, themes, and language.



2. Configure other system settings via **Tools>User Preferences** for features such as report creation, SpeechMike, and foot pedals (on the Reporting Control tab).
3. Customize how you want the navigation bar to display. If you want maximum screen space for the worklist, you can hide or auto-hide the navigation bar, or move it to another place on the screen. You can place it on top of the worklist. Drag and drop near an edge and the navigation bar will attach to the edge. Drag and drop away from an edge and the navigation bar will float where you drop it.

Select a Viewing Mode

You can view the worklists in two modes: the default Worklist mode, and Patient History mode. You can easily switch back and forth between the two modes.

In Worklist mode (the default), the worklist may display by date (for example, the Scheduled worklist displays exams scheduled for today or for a selected date) (A) or by exam status (for example, the Exam Done worklist displays all completed exams).

Navigation: Date WL Scheduled: 23/11/2018 Page: 1 Exam Done WL Page: 1

TEST, A (A)

Patient ID: 9003354
Birth Date: 1/01/1970
Age: 48Years

Scheduled Date: **23/08/2018**
Pacs SPS ID: 5002804319

Status: Exam Done

Flags	Patient ID	Permission Level	Scheduled date	First name	Last Name	Study Description
	9003354	0	23/08/2018	A	TEST	XRAY Neck
	9003354	0	24/08/2018	A	TEST	CT Chest
	9003354	0	24/08/2018	A	TEST	CT Abdomen a...
	9003354	0	24/08/2018	A	TEST	CT Brain
	9003354	0	24/08/2018	A	TEST	CT Ankle - Left
	9003354	0	27/08/2018	A	TEST	XRAY Neck
	9003354	0	27/08/2018	A	TEST	CT Brain
	9003354	0	27/08/2018	A	TEST	CT Ankle - Left
	TT9000039101	0	11/09/2018	Test Female	Test Female	CT Brain
	TT9000039101	0	11/09/2018	Test Female	Test Female	CT Temporal B...
	014	0	27/09/2018	Mike	Ross	CT Ankle - Left
	0000001	0	12/10/2018	model	test	CT Cervical Spine
	16	0	13/11/2018	spectre	harvey	XRAY Elbow - L...

Navigation: Patient search, Patient history (B), Patient log

In Patient History mode, you view the worklist with all activity for the selected patient. To switch to Patient History mode, click to select a patient in the worklist (or search for a patient), then click Patient History (B). The worklist displays the patient's worklist in a new tabbed page.

Navigation: Date WL Scheduled: 23/11/2018 Page: 1 Exam Done WL Page: 1 Patient History: harvey, spectre Page: 1

harvey, spectre (C)

Patient ID: 16 (D)
Birth Date:
Age:

Scheduled Date: **23/11/2018**
Pacs SPS ID: 5002804779

Status: Arrived

Receipt/Sched Pt View

Flags	Scheduled date	Scheduled TI	Patient ID	First name	Last Name	Status
			16	spectre	harvey	Cancelled by RIS
	23/11/2018	11:00	16	spectre	harvey	Arrived
	13/11/2018	13:15	16	spectre	harvey	Exam Done
	27/09/2018	10:45	16	spectre	harvey	Signed 1

Navigation: Patient log, Refresh (E)

To switch back to Worklist mode at any time, click the worklist tab such as in the example above (C).

NOTE: The Patient History tab (D) remains available, letting you easily switch back and forth, until you right-click the tab and select Close.

Notice that the options on the navigation bar (E) also change when you switch to Patient History mode.

Arrange the Worklist Columns

See the following topics for ways to optimize the worklist for your preferences.

[Move columns](#)

[Resize columns](#)

[Select columns to display](#)

[Sort a column](#)

[Group by columns](#)

[Stack columns](#)

NOTE: Each worklist is independent from other worklists. When you optimize a worklist, only that worklist is changed.

Once you have customized the worklist, you can save your work as a MyView for quick access. See [Save Your Worklist Customizations](#).

Move Columns

You can move the position of the columns in the worklist to optimize the order of the information that displays. To move a column, click and hold the top of the column, and drag to the new location. When the red arrows appear, release the mouse.

Receipt/Sched Pt View		Default worklist	
Scheduled date ▾	Scheduled Ti	Last Name	Status
	A	A	A
		harvey	Cancelled by RIS
23/11/2018	11:00	harvey	Arrived
13/11/2018	13:15	harvey	Exam Done
27/09/2018	10:45	harvey	Signed 1

Receipt/Sched Pt View		Custom worklist after drag & drop	
Scheduled date ▾	Status	Scheduled Ti	Last Name
	Cancelled by RIS		harvey
23/11/2018	Arrived	11:00	harvey
13/11/2018	Exam Done	13:15	harvey
27/09/2018	Signed 1	10:45	harvey

Resize Columns

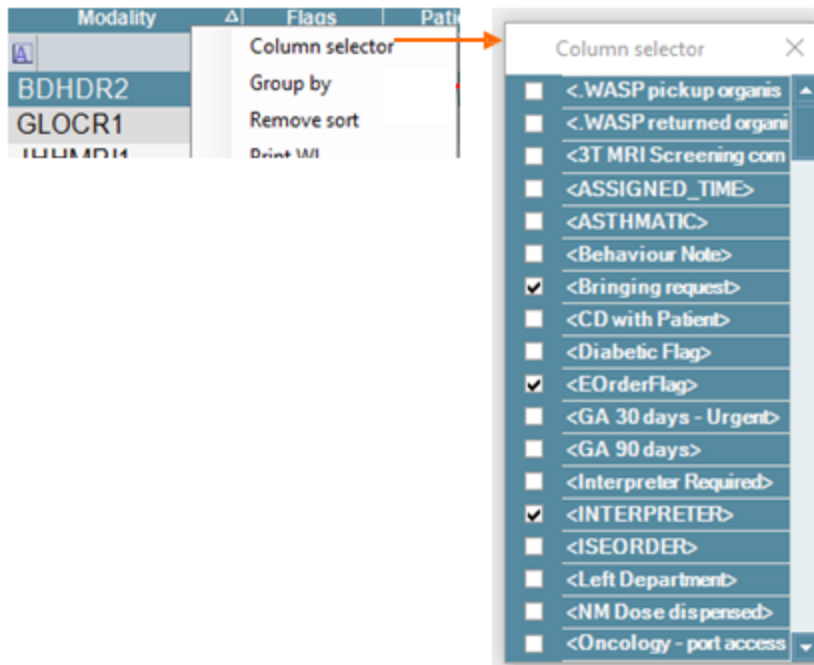
Find the divider line by moving your cursor over the top of a column border until the black arrows appear. Drag the line between two column headings.

Receipt/Sched Pt View				
Scheduled date ▾	Status	Scheduled Ti	Last Name	Study Description
	Cancelled by RIS		harvey	
23/11/2018	Arrived	11:00	harvey	XRAY Lumbar...
13/11/2018	Exam Done	13:15	harvey	XRAY Elbow - L...
27/09/2018	Signed 1	10:45	harvey	MRI Abdomen

You can also double-click the line between columns to automatically resize the column to the widest.

Select Columns to Display

You can select which columns to show and hide in the worklists. Right-click the column heading, then select **Column Selector**:



Click to select the columns to show or hide.

You can also drag a column from the Column Selector onto the worklist to control where it appears.

Sort a Column

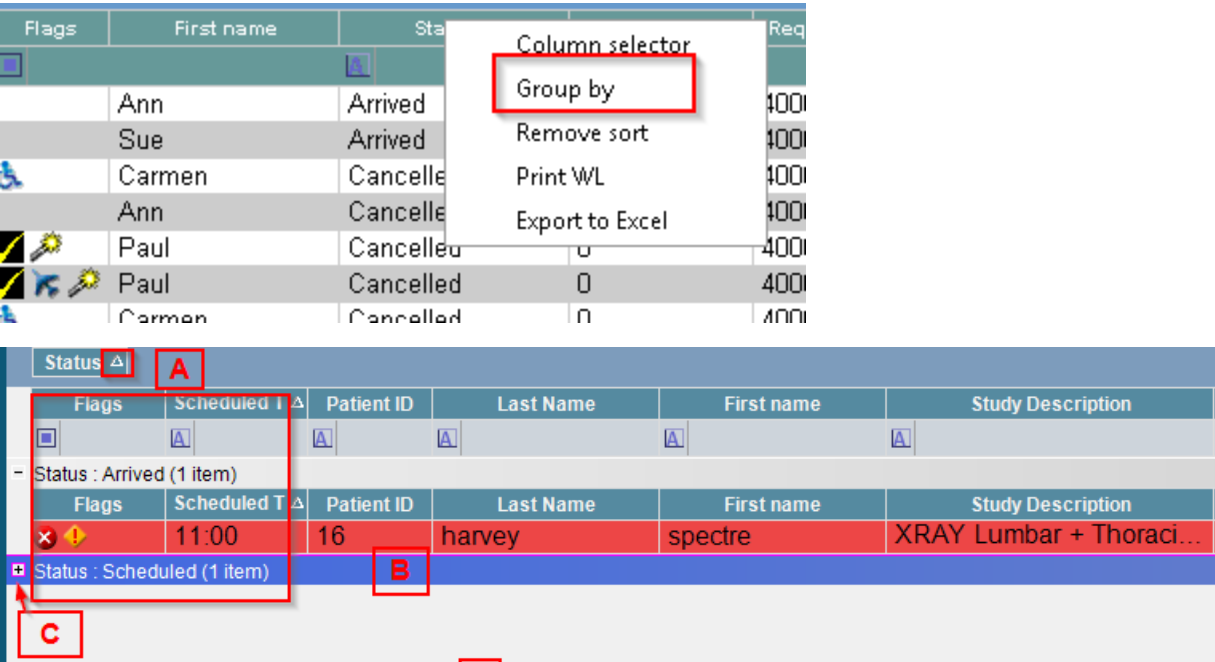
To sort a column in ascending (a to z) or descending (z to a) order, click the text portion of the column header. Click once for ascending and again for descending.

1. To add columns to the sort, hold the **Shift** key and click each additional column header.
2. To remove a column from the sort, hold the **Ctrl** key and click each column header.

Click arrow to sort ascending or descending			
Scheduled date	First name	Last Name	
23/08/2018	A	TEST	
24/08/2018	A	TEST	
24/08/2018	A	TEST	
24/08/2018	A	TEST	
24/08/2018	A	TEST	
27/08/2018	A	TEST	
27/08/2018	A	TEST	
27/08/2018	A	TEST	

Group by Columns

Group columns to collapse the information (to make the worklist more readable). To group by a column, right-click the column header and select **Group by**.



	Function
A	Indicates the grouped column. Click the arrow to change the sort direction of the list (ascending or descending).
B	The worklist rows. The number of exams in each group displays in parentheses.
C	'+' and '-' icons let you expand or compress the group.

To remove the grouping, drag the button (A) back to the worklist where you want the column to display.

Stack Columns

Stack columns, one on top of the other, to condense the information that appears on the screen. Drag the column header to its new location. When the black horizontal arrows appear above or below the column headings, release the mouse button.

- If the arrows are lined up with the **top** border of the target column, the dragged column appears above the target column.

- If the arrows are lined up with the **bottom** border of the target column, the dragged column appears below the target column.

Flags	Scheduled Time	Patient ID	First name	Status
	Scheduled date		Last Name	
	11:00	16	spectre	Arrived
	23/11/2018		harvey	
	13:15	16	spectre	Exam Done
	13/11/2018		harvey	
	10:45	16	spectre	Signed 1
	27/09/2018		harvey	

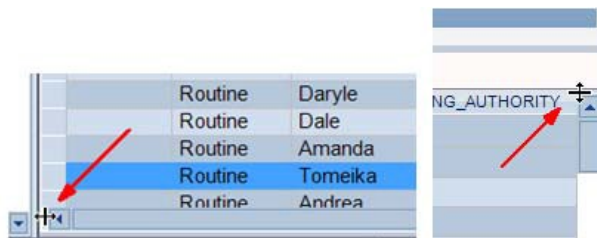
Split a Window

To view pieces of information that are not near each other in the worklist, you can divide the window into multiple panes - separate frames that provide a different view of the same window. Split the window into two or four panes, depending on how many different parts you want to see at once.

When you split a window, each pane contains an identical copy of the entire window. When you make a change to the window in one pane, the same change is applied to the other panes.

To compare different rows in the same window, use a **horizontal split**. To compare different columns in the same window, use a **vertical split**. To split a window horizontally, vertically, or both:

- Find the splitter controls on the lower left and upper right corners.
- Drag either control to split the window into two panes. As you drag, a gray bar appears showing where it will divide the window. The splitter bars can be repositioned later.
- Within each pane, scroll to the cells you want to see.



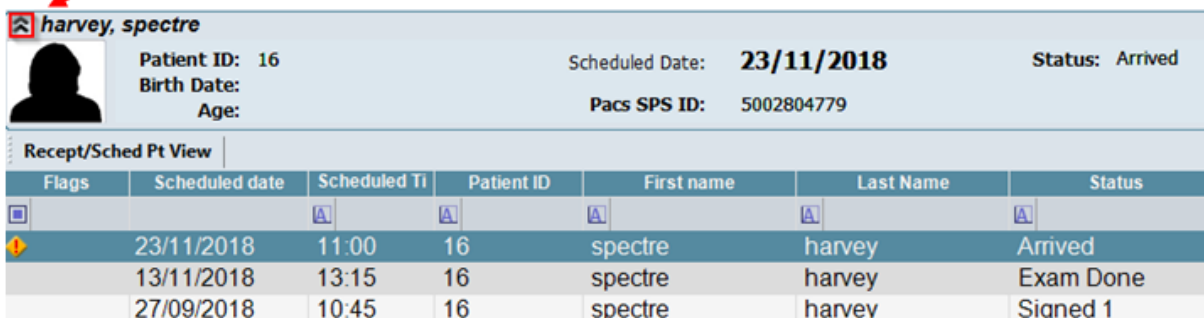
Drag the splitter controls to display the worklist in multiple frames. Then scroll to display the cells that you want to compare side-by-side.

To remove your panes, drag the splitter bar back to the edges of the window.

Make More Screen Space for the Worklist

You can show or hide the read-only patient information at the top of the screen (for the selected patient) to obtain more space for your worklist.

Click here to hide the patient details.



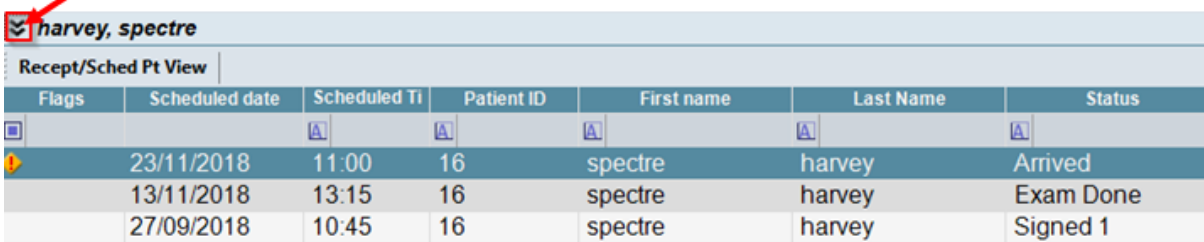
harvey, spectre

Patient ID: 16 Scheduled Date: **23/11/2018** Status: Arrived
 Birth Date: Pacs SPS ID: 5002804779
 Age:

Receipt/Sched Pt View

Flags	Scheduled date	Scheduled Ti	Patient ID	First name	Last Name	Status
	23/11/2018	11:00	16	spectre	harvey	Arrived
	13/11/2018	13:15	16	spectre	harvey	Exam Done
	27/09/2018	10:45	16	spectre	harvey	Signed 1

Click again to show the information.



harvey, spectre

Receipt/Sched Pt View

Flags	Scheduled date	Scheduled Ti	Patient ID	First name	Last Name	Status
	23/11/2018	11:00	16	spectre	harvey	Arrived
	13/11/2018	13:15	16	spectre	harvey	Exam Done
	27/09/2018	10:45	16	spectre	harvey	Signed 1

Working with Filters

Another way to customize your worklist is to apply a filter to one or many columns. You can filter any of the worklist columns to quickly view the most useful information for you.

Below are some examples of the ways different users may set up their worklists:

Area	Possible Use of Filters
Reception/Registration	By Status (Scheduled, Arrived)
Nurse	By Status (Scheduled)
Technologist	By Exam Room
Radiologist	By Reading Radiologist and by Reading Room
Transcriptionist	By Reading Radiologist or by Reading Room

If you need to view the same information frequently, you can save the filter as a MyView for quick access. See [Save Your Worklist Customizations](#).

See also:

[Filter by text](#)

[Filter for specific information](#)

[View filtered columns](#)

[Remove a filter](#)

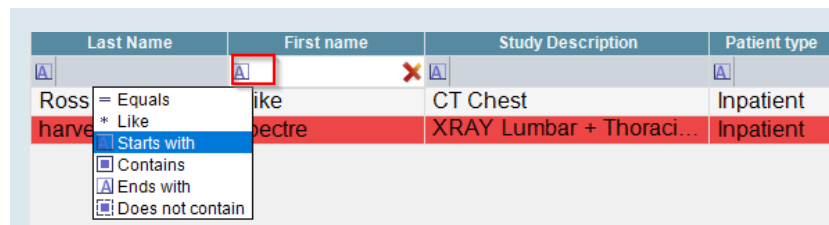
[Remove all filters](#)

Filter by Text

Filtering by last name, patient ID, etc. helps you quickly find an existing patient record. To filter by last name, click the top of the Last Name column (or another column for other information) and type the information.

Click in the filter row (beneath the column heading) and type the last name, or just the beginning of the last name. The worklist filters as you type.

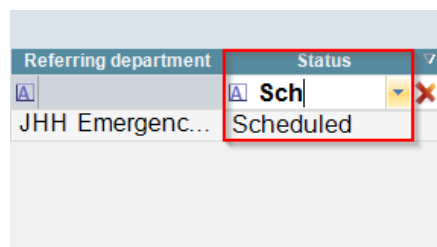
NOTE: There are several advanced search options to assist searches when exact and full details are not known:



Last Name	First name	Study Description	Patient type
Ross	Mike	CT Chest	Inpatient
Harvey	Spectre	XRAY Lumbar + Thoraci...	Inpatient

Filter for Specific Information

You might regularly want to view exams for a specific modality, exams with a specific status, etc. In this example, the Status are filtered to display only the Scheduled Studies. You can filter multiple columns.

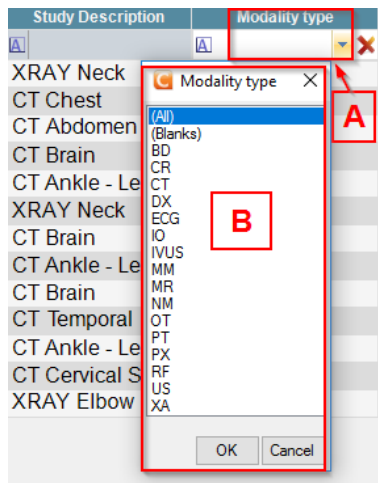


Referring department	Status
JHH Emergenc...	Scheduled

1. Click the arrow beneath the column header (A). A menu displays all the available types of information in that column (B).

NOTE: Alternatively, you can click in the filter row (beneath the column heading) and type a filter.

2. Select the item that you wish to view (B) and click OK.



- All - displays all rows (this is another way to remove filters that have been applied to this column).
 - Blanks - displays only the rows with no flags
 - Any of the items in the list - to display only rows with that item
3. The worklist filters to display only the information you selected:

Study Description	Modality type
[A]	= CT
CT Chest	CT
CT Abdomen a...	CT
CT Brain	CT
CT Ankle - Left	CT
CT Brain	CT
CT Ankle - Left	CT
CT Brain	CT
CT Temporal B...	CT

NOTE: The number of exams that display in the worklist with the filter applied is reported in the status bar, for example, "Ordered WL - 28 of 157 rows."

NOTE: Identify a filtered column by the filter that displays at the top of the column.

View Filtered Columns

Identify the filtered columns by the filter name at the top of the column:

Filtered columns			
Study Description	Modality type	PACS Accession Number	Status
= CT Brain	= CT		= Exam Done
CT Brain	CT	5002804344	Exam Done
CT Brain	CT	5002804363	Exam Done
CT Brain	CT	5002804420	Exam Done

Remove a Filter

To clear one filter at a time, click the X icon in the column header.

Study Description	Modality type	PACS Accession Number	Status
= CT Brain 	= CT		= Exam Done
CT Brain	CT	5002804344	Exam Done
CT Brain	CT	5002804363	Exam Done
CT Brain	CT	5002804420	Exam Done

Remove All Filters

To clear all filters and return the worklist to an unfiltered state, click .

Last Name	Study Description	Modality type	PACS Accession Number
	= CT Brain	= CT	
TEST	CT Brain	CT	5002804344
TEST	CT Brain	CT	5002804363
Test Female	CT Brain	CT	5002804420

Working with Flags

One of the common feature of all worklists is flags. Flags are small icons that display in the worklist. They represent different alerts and pieces of information that are associated with the exam/patient. They are used to:

- Alert you to check further into the patient record.
- Allow you to alert others to check further into the patient record.

Scheduled date	Patient ID	First name	Last Name	Flags	Status	Study Description
	A	A	A		A	A
	007	James	Bond	!	Cancelled by RIS	
	007	James	Bond		Cancelled by RIS	
31/10/2018	007	James	Bond		Approved	XRAY Cervical...
12/10/2018	007	James	Bond		Started	XRAY Chest
9/10/2018	007	James	Bond		Started	CT Brain
3/10/2018	007	James	Bond	! !	Scheduled	Ultrasound Abd...
29/09/2018	007	James	Bond		Scheduled	Ultrasound Abd...
29/09/2018	007	James	Bond		Scheduled	Ultrasound Breast
28/09/2018	007	James	Bond		Scheduled	Mammography...
17/09/2018	007	James	Bond		Signed 3	XRAY Skull
17/09/2018	007	James	Bond		Signed 1	XRAY Facial Bo...

The flag icons display in the worklist. From the worklist, you can also view more information about the flags, for example, what each icon represents. If there is related information with the flag, you can view that as well. For example, an allergy flag is represented by an "A" in the worklist. When you view more information about the flag, you can view the specific allergen for that patient.

Flags can be customized for your site by the system administrator based on several factors such as the relevance of the flag to the workflow at different points. For example:

- Some flags may display each time a patient appears in the worklist, while other flags may display only once for a patient, where the specific requested procedure appears in the worklist.
- Flags can be set to display automatically or manually. Automatic flags always display, while you must request manual flags to display. You can view whether the flag is automatic or manual from a right-click in the worklist and select **Flags > View All Flags**.
- You can show or hide some types of flags on the worklist. For example, if a flag is not relevant to your workflow, then you can hide it from the worklist - unless the system administrator has designated that the flag will always display. An example of a flag that the system administrator might designate as always shown (unable to be hidden) is one that indicates an infection risk. Flags that should not be hidden under any circumstance are those that indicate a potential danger to the patient or to those around the patient.

See:

[View flag options](#)

Work with Flag Options

To view flag options, right-click the worklist, and select **Flags**.

Flags	Requested procedure ID	Scheduled procedure step ID	Status	Last updated
	4000005492	5000005551	Cancelled	2/8/2018
	4000005490	5000005549	Cancelled	2/8/2018
	4000005491	5000005550	Cancelled	2/8/2018
	4000005493	5000005552	Cancelled	2/8/2018
	4000005505	5000005564	Exam Done	2/9/2018
	4000005505	5000005505	Exam Done	2/9/2018
			Exam Done	2/8/2018
			Arrived	2/8/2018
			Exam Done	2/9/2018
			Cancelled	12/4/2017
			Arrived	2/8/2018

Post exam
Diagnostic Report(s) Bulk Approve and Print
Change Status Approved
Transaction history
Add to conference...
Flags
Critical Results Accept

Flags legend
Set flags
Show Optional Flags

See:

[Filter flags](#)

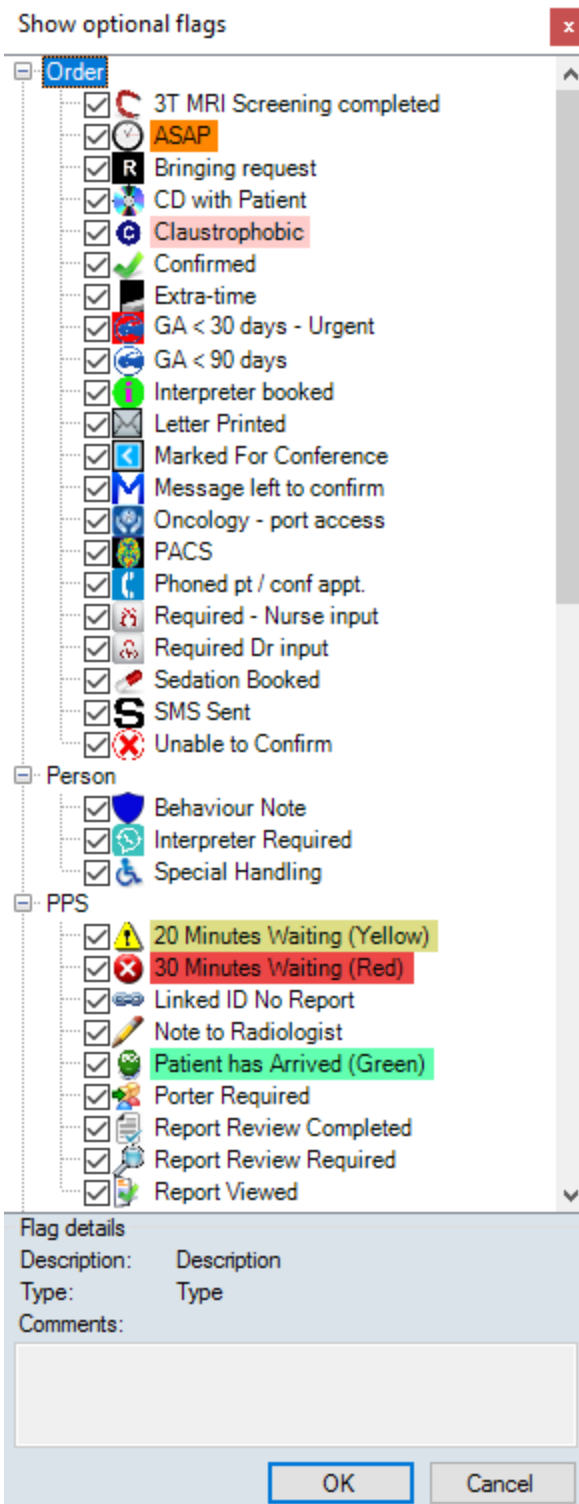
[Set flags](#)

[Arrange the location of the flags in the worklist](#)

[Filter the worklist for a flag](#)

Filter Flags

You can determine which of the optional flags display in the worklist. Optional flags are those that are not automatically displayed. They have been designated as optional by your system administrator.



To hide an optional flag on the worklist, click to remove the check, and then click OK. The optional flag is now hidden from the worklist.

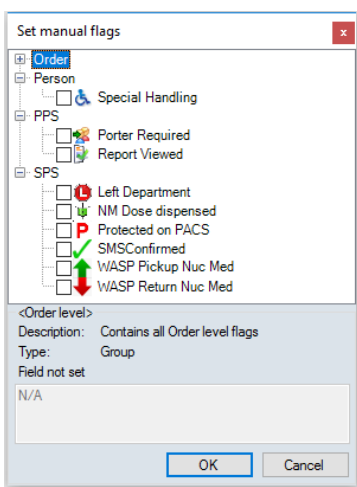
NOTE: Only the optional flags appear in this dialog. Automatic and required flags do not display on the Filter Flags dialog.

NOTE: In this and the other Flags dialogs, you can click the - or + signs to minimize or expand the list. For example, click the - in front of “Requested,” and the list of requested flags is minimized. Click it again to expand the list.

Set Flags

Use this option to apply manual flags to the patient/exam in the worklist. An example is a flag that alerts the radiologist to check on something related to the exam, or a flag that indicates that a porter is required to transport the patient for this exam. Right-click the exam in the worklist, and select Flags > Set Flags.

To apply these temporary flags to the exam/patient, click to select the checkbox.



Click the checkboxes as appropriate and click OK. The temporary flags now appear on the worklist for that patient/exam.

NOTE: Only the flags that are set up as manual appear in the Set Flags dialog. Automatic flags are not available here because they always display on the worklist.

Arrange the Location of the Flags in the Worklist

You can arrange the location of the flags column in the worklist to your preferences. Drag the Flags column header to reposition it or stack it above or below as described in [Optimize the Worklist](#).

Once you have customized the flags column in your worklist, you can save your work as a MyView for quick, easy access. See [Save Your Worklist Customizations](#).

Filter the Worklist for a Flag

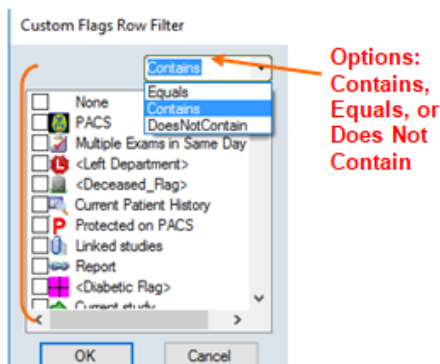
- From the worklist, click the arrow below the Flags column heading.

First name	Last Name	Study Description	Flags	Modality type	PAC S Accession Number	Status
A	A	A		A	A	A
A	TEST	(Custom)		DX	5002804319	Exam Done
A	TEST	(Blanks)		CT	5002804342	Exam Done
A	TEST	(Non Blanks)		CT	5002804343	Exam Done
A	TEST	PACS		CT	5002804344	Exam Done
A	TEST	Multiple Exams in Same Day		CT	5002804345	Exam Done
A	TEST	<Left Department>		CT	5002804360	Exam Done
A	TEST	<Deceased_Flag>		DX	5002804363	Exam Done
A	TEST	Protected on PACS		CT	5002804364	Exam Done
A	TEST	CT Brain		CT	5002804420	Exam Done
A	TEST	CT Ankle - Left		CT		
Test Female	Test Female	CT Brain		CT		

The menu lists the flags in the current worklist. Scroll down through the menu to view all the flags that are applied in the worklist.

- Choose one of the following to filter the worklist:
 - Custom** - displays all rows with custom flags. In the dialog that opens, click to select the flag to filter the worklist then click OK.

Click one or more check boxes to select flags.



- Blanks** - displays only the rows with no flags
 - Non-blanks** - displays only the rows with flags
 - Any of the flags - to display only rows with that flag applied
- In this example, this worklist has been filtered for “Order Scanned,” the flag that indicates that the patient’s referral and/or other documentation have been scanned into the patients’ file. Only the rows that are marked with an Order Scanned flag display in the worklist.

Study Description	Flags
CT Cervical Spine	<Order Scanned>

Save Your Worklist Customizations

Once you have customized the worklist to your preferences, you can save it as a MyView.

See:

[Save MyViews](#)

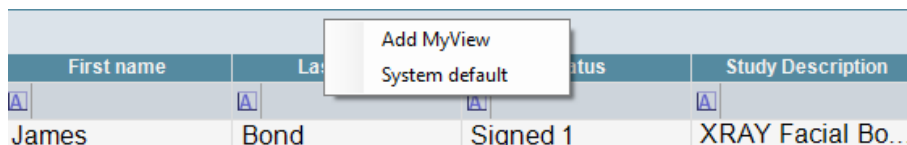
[Update MyViews](#)

Save MyViews

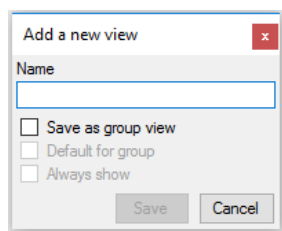
You can save multiple MyViews for quick access. Save one MyView as your default (the view that automatically displays when you open the worklist).

NOTE: Your MyViews only apply to the current worklist.

1. To save a MyView, right-click the header row above the worklist.



2. Select **Add MyView**.



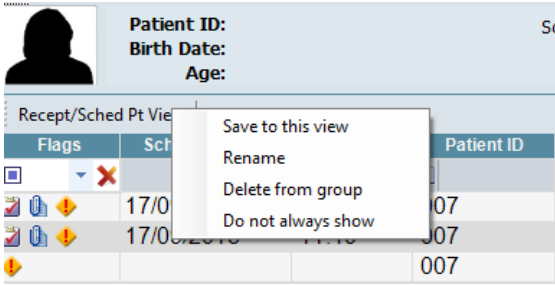
3. Enter a descriptive name.
4. If this worklist view should be saved for other users, click **Save as Group View** or **Default for Group**. (This feature is only available for some users based on permissions.)
5. Click **Save**. A new button appears at the top of the worklist with the name you entered.
6. Click the button to quickly apply the view any time.

See :

[Save Calendar Views as MyViews](#)

Update MyView

Right-click the MyView button to make any updates:



- **Save to this view** - Make any changes to the view, for example, add or delete a column's filters, and save the changes to this view.
- **Rename** - This will allow you to rename the view
- **Delete** - Delete the view if it no longer applies.
- **Set as default** - This view becomes the way the worklist displays each time you log on.

Additional Common Features

Common features and actions include, amongst others:

[Perform a Patient Search](#)

[Refresh the worklist](#)

[Set double-click actions](#)

[Work with transaction history](#)

[Work with the patient log](#)

Perform a Patient Search

All worklists provide a patient search feature where you can quickly locate the patient:



1. Enter your search criteria (A) and press the Enter key to open the Patient Search dialog with your results.

Or

Click  (B) to open the Patient Search dialog. Enter search criteria in the top panel (C) and then click Search (D).

NOTE: Click Reset to search again.

Date WL Scheduled: 26/11/2018 Page: 1 Ordered WL Page: 1 Patient search

Patient Search

Last Name: ☒ Starts with ☐ Whole word ☐ Sounds like

First name: ☒ Starts with ☐ Whole word ☐ Sounds like

Patient ID:

Birth Date:

C

D Search Cancel Reset

A total of 1 patient(s) were found. Page 1 of 1

Patient ID	Last Name	First name	Middle name	Birth date	Assigning authority	Street address	OTHER DESIGNA
007	Bond	James			Local Health Servic...		

The results appear in the lower section of the screen.

- Click the patient and then click Select (or double-click the patient). The selected exam appears in the worklist.

Refresh the Worklist

All worklists let you refresh to ensure that you are viewing the most current information.

To refresh, click on the navigation bar.

Set Double-Click Actions

You can set the action that occurs each time you double-click in the worklist. Right-click in the worklist and select **Set Double Click Action...** <your choice> (the possibilities vary by the type of worklist).

To remove or change the double-click assignment, right-click in the worklist and select **Set Double Click Action...** and then de-select the menu item or select a different menu item.

Work with Transaction History

From any worklist, you can view the transaction history for a patient. RIS keeps a history of important transactions with a patient record. This transaction information can be important when troubleshooting any issues or when tracking the access of patient information for purposes related to HIPAA, etc.

Transaction history: 16 - harvey, spectre

Log time	Performed by	
13/11/2018 1:23:35 PM	(CARESTREAM@HNE) Carestream Service	Order for XRAY Upper Limb, requested on 13/11/2018 has
13/11/2018 1:23:35 PM	(CARESTREAM@HNE) Carestream Service	Order for XRAY Upper Limb, requested on 13/11/2018 sign
13/11/2018 1:24:16 PM	(CARESTREAM@HNE) Carestream Service	Order for XRAY Upper Limb, requested on 13/11/2018 hav
13/11/2018 1:24:42 PM	(CARESTREAM@HNE) Carestream Service	Order for XRAY Upper Limb, requested on 13/11/2018 hav
13/11/2018 1:25:31 PM	(CARESTREAM@HNE) Carestream Service	Order for XRAY Upper Limb, requested on 13/11/2018 deta
13/11/2018 1:25:32 PM	(CARESTREAM@HNE) Carestream Service	XRAY Elbow - Left (13/11/2018 1:15 PM, GLOCR1, 500280
13/11/2018 1:25:32 PM	(CARESTREAM@HNE) Carestream Service	XRAY Elbow - Left (13/11/2018 1:15 PM, GLOCR1, 500280
13/11/2018 1:26:42 PM	(CARESTREAM@HNE) Carestream Service	Performed procedure "XRAY Elbow - Left" was added
13/11/2018 1:26:42 PM	(CARESTREAM@HNE) Carestream Service	Scheduled step "XRAY Elbow - Left (13/11/2018 1:15 PM,
13/11/2018 1:26:43 PM	(CARESTREAM@HNE) Carestream Service	Performed step "XRAY Elbow - Left" created and status set
13/11/2018 1:28:22 PM	(CARESTREAM@HNE) Carestream Service	XRAY Elbow - Left study information retrieved.

☐ Show all patient transactions

Close

To access Transaction History:

1. Click to select a study in the worklist.
2. Right-click and select **Transaction History**.
3. Click the check box for **Show all Patient Transactions** if you want to view all transactions for the patient.
4. Click **OK**.

Work with the Patient Log

From many worklists, you can view or type in the patient log. The log displays information that anyone along the workflow can enter or view for that order.

1. Click to select the patient on the worklist.
2. From the navigation bar, click **Patient Log** (or right-click and select Patient Log). The **Patient Log** appears with any information for that order.
3. Review the log items.
4. To save a new log item, select the comment type (Clinical or Other) (A), type the item in the field (B)

and click **Save** (C).

Patient Log: 16 - harvey, spectre

Date	Performed by	Comment	Organization structure	Type
23/11/2018 10:04:18 AM	(CARESTREAM@HNE) Carestream Service	Patient has iodine allergy	Hunter New England Imaging	Clinical
23/11/2018 10:05:31 AM	(CARESTREAM@HNE) Carestream Service	Patient is partially blind	Hunter New England Imaging	Clinical

A (points to the 'Comment type' dropdown menu)

☐ Current Order ☒ Entire Patient Log

Comment type: Clinical

Patient is partially blind

B (points to the text input field)

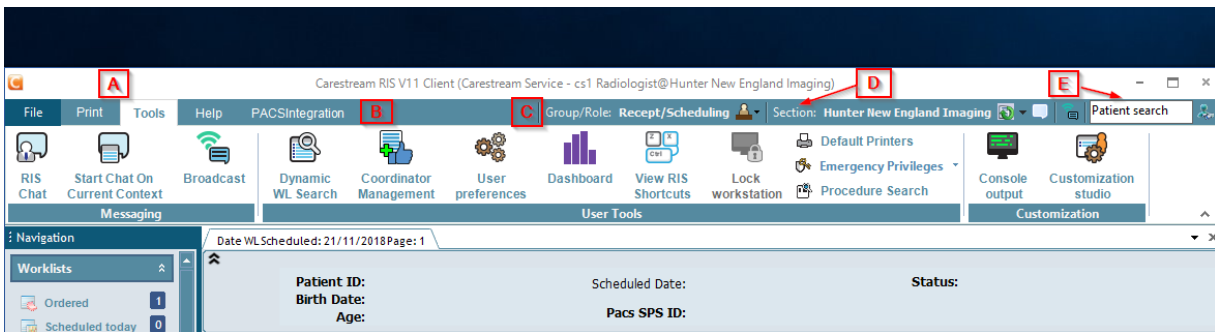
C (points to the 'Save' button)

New Edit Delete Save Close

RIS Layouts

The following shows a standard RIS layout. Your system administrator works with Philips to customize the layout for your site.

NOTE: Because of the customization work that provides optimized software and layout for your site, the screen shots in these training modules are likely to vary from the RIS software at your site. The screens in the training manuals are intended to serve as examples only, to help you become oriented to the screens and capabilities of the software.



	Description	Function
A	Header bar	Identifies the user that is logged on.
B	Menu bar	Access to general tasks. These vary by site, but some examples are: • File > Logout, Switch User, Exit • Print > Management Reports, Labels and Forms, Letters • Tools > Audio Wizard, User Preferences, Change Password, Lock Workstation • Help > About RIS
C	Role menu	Change to a different role. This menu is not available to many users, as most users will not need to switch roles.
D	Section menu	Change to view the worklist for a different area. If you are responsible for more than one section (department, facility, etc.), then you can select the area to display in the worklist. The sections that are available for selection are based on the user account.
E	Patient Search field/icon	Provides quick access to the patient search functionality.

TEST, A

Patient ID: 9003354
 Birth Date: 1/01/1970
 Age: 48Years

Scheduled Date: **23/08/2018**

Pacs SPS ID: 5002804319

Status: Exam Done

Flags	Patient ID	Permission Level	Scheduled date	First name	Last Name	Study Description	Modality type
	9003354	0	23/08/2018	A	TEST	XRAY Neck	DX
	9003354	0	24/08/2018	A	TEST	CT Chest	CT
	9003354	0	24/08/2018	A	TEST	CT Abdomen a...	CT

	Description	Function
F	Active tab	In this example, the active tab identifies the worklist that displays. Use the tabs to move between any activities that you have started.
G	Inactive tab	Represents another worklist or task that you have opened or started. There might be several tabs at any time.
H	Patient information for the selected patient	The patient information is read-only and configurable by site. Your system administrator will determine the information that appears here to optimize workflow for your site.
I	Column header row	Click the filter row to select or enter a filter for the column. Learn more about filters in Worklists .
J	Filter row	Click the filter row to select or enter a filter for the column. Learn more about filters in Worklists .
K	Worklist rows	A worklist is a schedule of appointments at various stages of the site's workflow. There are several worklists in RIS, and the information that displays in the rows depends on the type of worklist and the criteria that is defined for the worklist. Learn more about this in Worklists .

The screenshot shows the RIS Worklist interface. On the left is a 'Navigation' sidebar with sections: Worklists (containing 'Ordered' with count 1, 'Scheduled today' with 0, 'Scheduled for date' with 0, 'Justification required' with 0, 'Protocol required' with 3, 'Exam done' with 13, 'Signature 1' with 10, and '<Protocol Complet...' with 0), Actions (containing 'Protocol Together' and 'View conferences'), and Patient (containing 'Patient search', 'Patient history', and 'Patient log'). The main area displays patient information for 'TEST, A' (Patient ID: 9003354, Birth Date: 1/01/1970, Age: 48 Years, Scheduled Date: 27/08/2018, Status: Scheduled, Pacs SPS ID: 5002804359). Below this is a table with columns: Scheduled date, Flags, Last Name, First name, Status, Modality type, and Modality. The table contains three rows of scheduled exams. Callouts are placed as follows: 'L' points to the 'Protocol Review' tab; 'M' points to the 'TEST' last name in the first row; 'N' points to the status bar at the bottom right showing 'Selected: 1 [total: 3]'; 'O' points to the 'Modality' column header; and 'P' points to the 'Patient log' link in the sidebar.

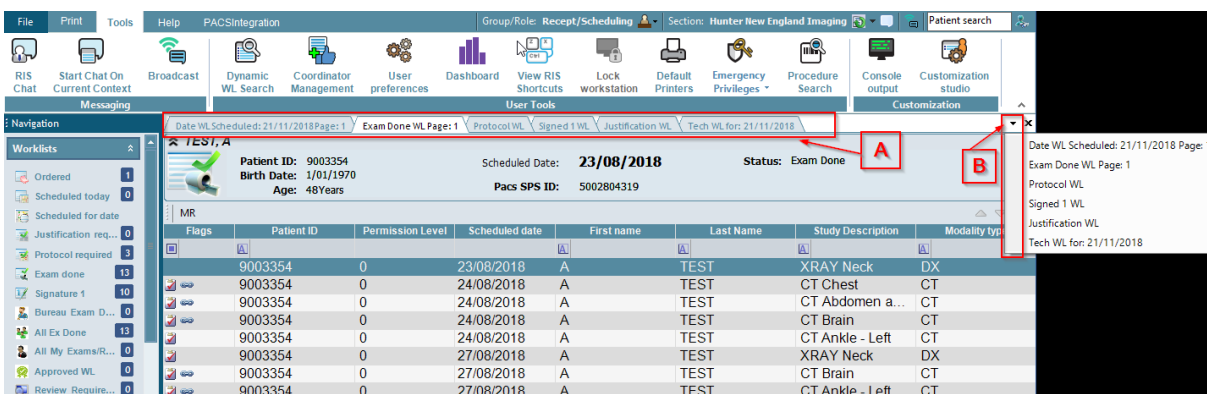
	Description	Function
L	MyView bar	Displays saved views (customized versions of the worklist). Learn more about this in Worklists .
M	Selected patient	When you click to select a patient, the row becomes highlighted in the worklist.
N	Status bar	Indicates RIS status, for example, "Retrieving Worklist." Provides the number of rows in the worklist. If filters are applied, the status bar lists the number of rows display and total, for example, "8 of 121 rows." Worklist status indicators provide a visual indication of the worklists. Learn more about this in Worklists .
O	Worklist columns	You can arrange the columns in a variety of ways to meet your preferences. Learn more about this in Worklists .

	Description	Function
P	Navigation bar	Provides buttons to access most tasks. Most worklists have panels for Worklists, Patient, and Actions. You can drag and drop the navigation bar to any location on the user interface, or temporarily hide it to gain screen space. The navigation bar is interactive; buttons become disabled or enabled depending on where you are in the user interface, what you have selected, etc

Data Windows

Several of the RIS screens are data windows, or customizable, dynamic forms where you enter patient-specific information.

Multiple data windows can be open at the same time, allowing you to start one thing and then move on to another activity before finishing the first. Move through the different data windows by clicking the tabs at the top of the screen.



Data windows separate patient information into groups.

The elements in data window groups are called controls. Controls range in complexity from text-based controls (including text box and list box controls), to controls that are similar to spreadsheets (including data grid controls).

You might have more tabs open than can display in the tab row at the top (A). If so, click the arrows at the right (B) to view more open tabs.

To close a tab, right-click the tab and select **Close**. If you have not finished the activity, a dialog will ask you to confirm that you want to close without saving.

Getting Started

These are the initial actions you may want to familiarize yourself with when you get started:

[Log On](#)

[Switch between Roles](#)

[Use Worklists](#)

[Log Out](#)

[Close RIS](#)

[Share a Workstation/Switch Users](#)

[Switch between Worklists](#)

Log On

1. Enter your Login ID.
2. Enter your Password.
3. Click **OK**.

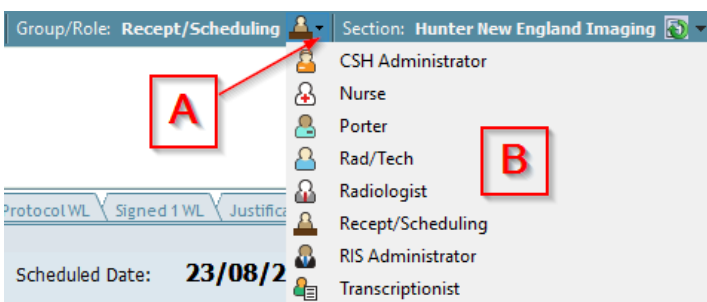
Switch Between Roles

You can easily work in multiple roles if your job function requires it.

NOTE: Many users will not see the role selection drop-down menu as most users do not switch roles.

To switch between roles:

1. At the top of the RIS screen, locate the Role button. Click the drop-down arrow (A).
2. Click a role from the list (B).



Use Worklists

All users work with at least one of the RIS worklists. There are several types of worklists, and they are all based on patient exams. Each type of worklist functions in the same way, with a common set of features and a wide variety of possibilities for customization. The worklists vary by the information that is included in each.

While working in RIS, each type of user begins at a worklist for most tasks. The worklists are continually updated and with your help, the worklists manage the patient's steps through the healthcare experience.

For more information, see [Worklists](#).

Log Out

1. Select **File > Logout** from the menu bar.
2. At 'Are you sure you want to logout?' click **Yes**.

Close RIS

Select **File > Exit** from the menu bar.

Share a Workstation / Switch User

Although you share computers, DO NOT share usernames and passwords. When sharing a workstation with others, it is important that you do not use someone else's login information. Always switch to your username and password to perform any work in RIS in order to:

- Access your optimized settings and layouts. Your settings are associated with your user account, so if you do not log on with your account, you will not find your saved settings and layouts.

- If you use voice recognition, your profile is tied to your user account. The profile provides you with consistent speech results on all workstations.
- Allow the system to maintain accurate transaction history in the Audit Log. This transaction information can be important when troubleshooting any issues or when tracking the access of patient information for purposes related to HIPAA, etc.

To switch users while sharing a computer:

1. Select **File > Switch User**. The login screen appears.
2. Enter your login ID and password.

NOTE: See your system administrator if you do not know your user ID and/or password.

3. Click **OK**.

Switch Between Worklists for Different Areas

A section is a location: an area, a facility, an office, a clinic. If you need to access patients and exams for multiple locations, you can select a section from the list to change the view between the sections.

1. At the top of the RIS screen, locate the **Section** button. Click the drop-down arrow.

A screen displays the available sections in a hierarchal view. Selecting a section at the top level provides the worklist entries (patients/exams) for all the sections underneath.

The sections that are available to you depend on the permissions that are associated with your user account. Sections that are not available to you are disabled (unselectable) in the list.

2. Click a section from the list. The worklist changes to show the patients/exams for the selected section.

Section: Hunter New England Imaging Patient search

Tech WL for: 21/11/2018

Status:

Procedure ID	Scheduled procedure step ID

Organization structure

- HNELHD-Hunter New England Local Health District
 - HNEI - Hunter New England Imaging**
 - Nuclear Medicine - Nuclear Medicine
 - Northern - Northern
 - TRRHNUC - Tamworth Nuclear Medicine
 - Southern - Southern
 - CMNNUC - Calvary Mater Nuclear Medicine
 - JHHNUC - John Hunter Nuclear Medicine
 - Radiology - Radiology
 - Hunter - Hunter
 - CDHRAD - Cessnock Radiology
 - MCHRAD - Merriwa Radiology
 - MDHRAD - Muswellbrook Radiology
 - SDHRAD - Singleton Radiology
 - SMHRAD - Scone Radiology
 - LMNC - LMNC
 - BCHSRAD - Bulahdelah Radiology
 - GSMHRAD - Gloucester Radiology
 - MRRHRAD - Manning Radiology

If you select the top level section, all sections will display together in the worklist. Choosing a level lower in the hierarchy, will result in worklist entries for all sections within and below that hierarchy selection.

Scheduling

Scheduling is the operation of booking time slots for patients on available modalities for the performance of requested imaging procedures. This operation is carried out in the **Schedule** form by a user with scheduling permissions (a Scheduler role) either for an existing order or as part of the process of creating a new order. The booking may be done either by manually marking an available time slot in the calendar or by letting the system automatically search for, and propose, the first available time slot.

Scheduling of procedures takes into consideration various factors such as appropriateness of the modality for the requested exam, modality availability, patient type, exam duration, required date and time frames, required resources (optional), and others. Additionally, the scheduling of the requested procedure is affected by machine priority, resource priority, and filters such as the scheduling group assigned to the user and organizational structure. When all the requested bookings are shown in the calendar of the **Schedule** form, you proceed to carry out the actual scheduling by saving all these proposed time slot bookings.

See:

[The Schedule Form](#)

[Schedule Appointments](#)

NOTE: Depending on the Philips RIS version installed and specific configuration implemented at your site, the User Interface of the scheduling operation in the system you are using may present slight differences compared with the User Interface presented in this help. Consult your site administrator.

The Schedule Form

You use the Schedule form to book and save time slots for the performance of medical imaging procedures.

See:

[Access the Schedule Form](#)

[Schedule Form Components](#)

[Edit Procedure Details](#)

[Exam Statuses upon Completion of Scheduling](#)

[Automatic Adjustment of the Schedule Form to Specific Actions](#)

Access the Schedule Form

The **Schedule** form serves to schedule both existing orders and newly created orders, as well as to change existing scheduling. You access the window by selecting the Schedule Order, New Order + Schedule, or Edit Schedule actions in the Navigation bar.

See:

[Layouts](#)

[Exam Statuses upon Completion of Scheduling](#)

Schedule Form Components

The screenshot displays the Schedule Form interface for a patient named Bob. The form is divided into several sections, each labeled with a letter from A to J:

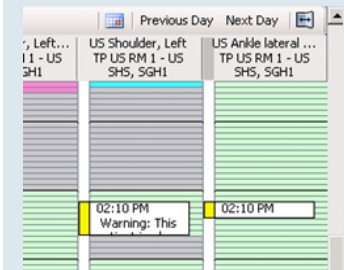
- A**: Procedure Selection table showing details for two procedures: Adrenal Venous Sampling and 2nd Read Additional Study.
- B**: Procedures for Selected Study section.
- C**: Patient Reporting Time section.
- D**: Patient Type and Duration Modifier section.
- E**: Zoom and Show Details/Day View section.
- F**: Search and Navigation buttons.
- G**: Previous Day and Next Day buttons.
- H**: Main scheduling grid showing time slots (3-9) and resources (Angio1-0K, Angio2-0K, Angio3-0K).
- I**: Anesthesia section.
- J**: Visit ID section.

Request	Study	Start time	Minutes	Modality	Mod	Resources
Angiography Abdomen	Adrenal Venous Sampling	1/9/2019 6:23 AM	50	Angio1Angio1	-100	1/1 (1)
Angiography Abdomen	2nd Read Additional Study	1/9/2019 6:23 AM	41	Angio1Angio1	39	0/0

	Description	Function
A	Procedure Selection	A grid listing the studies to be scheduled. If you accessed the Schedule form based on an existing order, information of the study is displayed, including the requested procedure, the study description and the actual procedure or procedures of the study (see B). Also included are the duration of the exam (Minutes column) and the amount of time by which the duration was modified by you, if you have modified it (Mod column). For actions you perform in the Procedure Selection grid, see C. When a time slot is proposed, the modality name is added to the grid. If resource scheduling is used, the grid also displays the number of resources requested for the procedure and the number of resources scheduled. See Resource Scheduling. A  sign in the grid indicates that an available time slot was found and proposed for that study. An  indicates that no proposed booking exists as yet for this study. This may also indicate that there is an error with the proposed booking. See Appointment Validity Indications in Manage Active Appointments. A  indicates that there is a warning regarding the selected time slot.
B	Procedures for Selected Exam (Study)	A list of the procedures included in the selected exam (study) row in the Procedure Selection section. The list includes the procedures selected in the Procedure Code Selection (Procedure Picker) for the selected study. Right-clicking in the procedure list section allows you to do the following: • Duplicate a procedure (without laterality and modifiers) • Delete a procedure from the list • Edit a procedure—Select the Edit Procedure option from the right-click menu to open the Edit Procedure Details window, where you can add or change procedure details, such as procedure code or laterality. See: Edit Procedure Details Use Procedure Picker

	Description	Function
C	Action Buttons	• Patient Type—If you are scheduling an existing order, patient type is normally selected. Changing a patient type affects the modality availability displayed in the appointment calendar. It may also affect the delay value. • Duration Modifier—Increase or decrease the study duration, for example if you estimate that the required time is longer than the time originally set for that study due to the patient's mobility limitations. The value you select in Duration Modifier appears in the Mod column, and the overall modified study length appears in the Minutes column. • Add/Edit—Click to open the Procedure code selection window (Procedure Picker), in which you select the study group, the study, and the procedure of the study. You can also filter the studies and procedures in the Procedure Picker by scheduling group and organization structure (see Study Filters). The studies and procedures you select in the Procedure Picker are immediately listed in the Procedure Selection grid and the Procedures for Selected Study list in the Schedule form. See Use the Procedure Picker. • Cog Icon—Click to open the Study Filters window. Selecting a filter affects the study group, study and procedure options displayed in the Procedure Picker and the modalities displayed in the appointment calendar. Filters include Scheduling Group and Organization Structure and Protocol Organization (if applicable). The cog icon is available both from the Schedule form and from the Procedure Picker window. When filters are set in the Study Filters window, the cog icon becomes a cog with a filter. See Study Filters. • Delete—Click to delete the selected row in the Procedure Selection grid. • Delay—Determine a number of days by which the automatic search for an available time slot will be delayed, starting from today. • Search—Click to let the system find and propose the nearest available time slot. The search takes into account all study filters, including scheduling group and organizational structure, modality priority (configurable), and all the advanced settings you selected, including time ranges, modality availability indications, and resources (configurable). See F. By default, the search covers the displayed modalities starting at the current day. You can use the Search drop-down list to start the search from the next day, next week, or next month. The search starts from the beginning of next day, week, or month, respectively. Selecting next year will start the search a year from today (rather than at the beginning of next year). When an available slot is found, the booking is proposed by marking the time slot in the appointment calendar, displaying the time and name of the procedure (configurable) and a color serving as a validity indicator (configurable). See Appointment Validity Indications in Manage Active Appointments.

	Description	Function
		• Next, Previous—Moves the proposed booking forward or backward in the calendar to the next or previous available time slot found by the search mechanism. These buttons become available only when the first available time slot found is proposed and booked in the calendar. See a description of manual and automatic scheduling of studies.
D	The date of the current view	The date represents the selected view (day view of today by default). Selecting a different view affects the displayed date. See E - Views.
E		• Zoom—Allows you to zoom the appointment calendar display. • Show Details—Displays additional details of the exam (configurable). • Views—Allows you to do the following: • Change the calendar view from a daily view to a monthly view. • Display the level of modality utilization. See View Modality Utilization. • Display Modality Availability. See View Modality Availability.
F	Advanced Settings	Allows you to use settings and criteria to narrow down the automatic search for available time slots. Click the Advanced Setting icon  to display the Advanced Settings pane. You can use the following settings: • Specify date and time ranges. • Specify availability indicators marked by different colors. • For multiple study scheduling, determine whether all appointments will be at the same hospital • Request resources (if the scheduled study is set as a multi-resource study). See: Use Advanced Settings Resource Scheduling.
G	Previous [time unit], Next [time unit]	Depending on the selected view (day or month), you can click the Next and Previous buttons to display the modalities of the next or previous time unit. You can also click the calendar icon  to select a different date that is not immediately following or prior to the currently selected view.

	Description	Function
H	Appointment Calendar	The appointment calendar appears when at least one study appears in the Procedure Selection grid. By default, the calendar displays a day view of all the modalities associated with all studies displayed in the Procedure Selection grid. Each column represents one modality. The column heading displays the name of the modality and its location in the organization structure. For each modality, colored availability indicators mark the different types of availability (configurable). A cross-modality black marking (configurable) in the calendar indicates that the patient is already booked for an exam at that time, and therefore should not be scheduled for another procedure at that time slot. If a modality is defined as closed, it does not show in the calendar. NOTE: When two different studies with two different availability templates are being scheduled on the same modality, the calendar displays a split view, where the same modality is shown in two columns with two different templates for the different studies.  Hover over a scheduled procedure to display additional details: start and end time of the exam, its duration, and its description. Regardless of the date displayed in the calendar, double-clicking a study name in the Study column of the Procedure Selection grid changes the calendar view to display the date of the booked appointment for that study. To remove a proposed booking, right click and select Remove Appointment.
I, J		Areas displaying site-specific information configured in scheduling data windows. (Consult with your system administrator).

Edit Procedure Details

Right-click a procedure in the **Procedures for Selected Studies** list in the **Schedule** form to edit a selected procedure.

Edit Procedure Details

Procedure code
+ (L, 2mod) CT_CT3DF CT 3D Face

Laterality: L
Modifier code: 2mod

Extra Code list:
ATA (selected)

Buttons: Add, Delete, OK, Cancel

NOTE: The window allowing you to edit the procedure details is a data window that can be configured to meet your site requirements and therefore may look different in different sites.

In the window illustrated here, the procedure can be edited as follows:

- Select laterality from the **Laterality** drop-down list. A laterality notification is added as a prefix to the Procedure code name.
- Select a code from the **Modifier code** drop-down list. The modifier code typically indicates whether the procedure requires any special treatment, for example IV or O2 (Oxygen). A modifier code notification is added as a prefix to the procedure name in the **Procedure code** box. In the current illustration, the added code prefix is **2mod**.
- Select a code from the **Extra Code** drop-down list. Use the **Add** button to select multiple codes if needed. Extra codes are typically billing-related codes that are added to the procedure, for example TC for 'technical component' only (read is done somewhere else). An extra code notification is added as a prefix to the procedure name in the **Procedure code** box. In the current illustration, the added code prefix is **+**.

The prefixes added to the procedure name appear in the **Procedures for Selected Studies** list in the **Schedule** form.

Procedures for Selected Study
+ (L, 1mod) CT_CT3DF CT 3D Face

NOTE: You may select laterality in the **Edit Procedures Details** window even if no laterality has been associated with the procedure. In such cases, the procedure appears in the **Procedure code selection** window (Procedure Picker) twice, once without laterality and once with. This duplicity is

valid only for the current session to allow the Procedure Picker to reflect your settings in the **Edit Procedure Details** window. See [The Procedure Picker Window](#).

Exam Statuses upon Completion of Scheduling

A scheduled exam (study) may be either in Scheduled status or in Arrived status.

When you have completed the scheduling operation, you can do one of the following:

At the right-hand side of the **Patient History** window section at the bottom of the screen:

- Click **Save**—All scheduled appointments are saved and a Scheduled status is assigned to the scheduled studies

Or

- Click **Arrive**—All scheduled appointments are saved and an Arrive status is assigned to the scheduled studies, allowing the technologist/radiographer to start documentation of the studies.

Patient history - Selected: 0 [total: 11]

Flags	Requested procedure ID	Scheduled procedure step ID	Scheduled date	First name	Last updated	Patient flagset
	4009146593	5009260436	5/3/2018	-	2/3/2019	
	4009150683	5009264582	12/31/2018	-	1/8/2019	
	4009150683	5009264583	1/13/2019	-	1/23/2019	
	4009150683	5009264584	1/13/2019	-	1/23/2019	

Arrive Save Close

Automatic Adjustment of the Schedule Form to Specific Actions

The **Schedule** form may vary slightly, depending on the action you are performing:

- Schedule Order**—You are scheduling an existing order that is selected in the WL grid for a patient that already exists in the system. The **Schedule** form does not include a section designated for providing patient details. The **Procedure Selection** section of the **Schedule** form lists the ordered studies. See [Schedule Form Components](#).
- New Order + Schedule**—You are creating a new order and scheduling it in a single operation. Two scenarios are possible:
 - You are creating an order for a patient who exists in the system.
 - You are creating an order for a patient who does not exist in the system.

In both cases, the **Schedule** form includes a **Patient** section allowing you to create a new patient or search for an existing one.

Patient	Temp ID	Order:
ID:	Search	New Visit: New Order EN
123456		

If you are scheduling a new order for a patient who exists in the system, some patient details are already filled in.

When you are scheduling a new order, the Procedure Selection section of the Schedule form lists the ordered studies. See [Schedule Form Components](#).

NOTE: While you are engaged in the scheduling operation of a newly created order and before you save your scheduling you may switch between patients.

- **Edit Schedule**—You are using the **Schedule** form to make changes to an already scheduled appointment selected in the WL. In this scenario, the **Schedule** form does not include a section designated for providing or changing patient details. The **Procedure Selection** section of the **Schedule** form lists the selected study as well as other studies that have been originally scheduled together with this study as part of a multi-study scheduling operation. See [Booking Appointments for Multiple Studies](#).

Schedule Appointments

The appointment scheduling operation includes the following stages:

1. List the exams (studies) in the Procedure Selection grid in the Schedule form. If the studies are already listed when you open the Schedule form, you may add or change studies. You manage the study list using the Procedure code selection window ([Procedure Picker](#)) and in the [Study Filters](#) window.
2. Once all the required studies and procedures are listed in the Schedule form, you proceed to find and book available time slots in the calendar.

You can adjust the appointment calendar view to meet your requirements. See [Schedule Form Components](#) and [Use Advanced Settings](#).

You can also set user preferences to meet your specific requirements. See [User Preferences](#).

The appointment scheduling process comprises these principal actions:

- a. Set time and availability filters to narrow down searches for available time slots in automatic scheduling. See [Use Advanced Settings](#).
 - b. Request resources (for studies that are set as multi-resource studies). See [Resource Scheduling](#).
 - c. Book available time slots in the calendar using either an automatic search or manual time slot selection. See [Automatic Scheduling](#) and [Manual Scheduling](#).
 - d. Make changes in proposed bookings marked in the calendar. See [Manage Proposed Appointment Bookings](#).
 - e. Set shortcuts to calendar views that include your preferred settings. See [My Views](#).
3. Save all bookings marked in the appointment schedule. All marked bookings in the calendar are actually proposed bookings. They become scheduled appointments only when you click Save in the Schedule form. See [Exam Statuses upon Completion of Scheduling](#).

See:

- [Use Procedure Picker](#)
- [Use Advanced Settings](#)
- [Automatic Scheduling](#)
- [Resource Scheduling](#)
- [Manual Scheduling](#)
- [Manage Proposed Bookings](#)
- [Preparation Time](#)
- [Save Calendar Views as MyViews](#)
- [View Modality Utilization](#)
- [View Modality Availability](#)
- [Schedule Walk-in Patients](#)
- [User Preferences](#)

Use the Procedure Picker

Use the Procedure Picker to select exams (studies) and procedures for scheduling.

See:

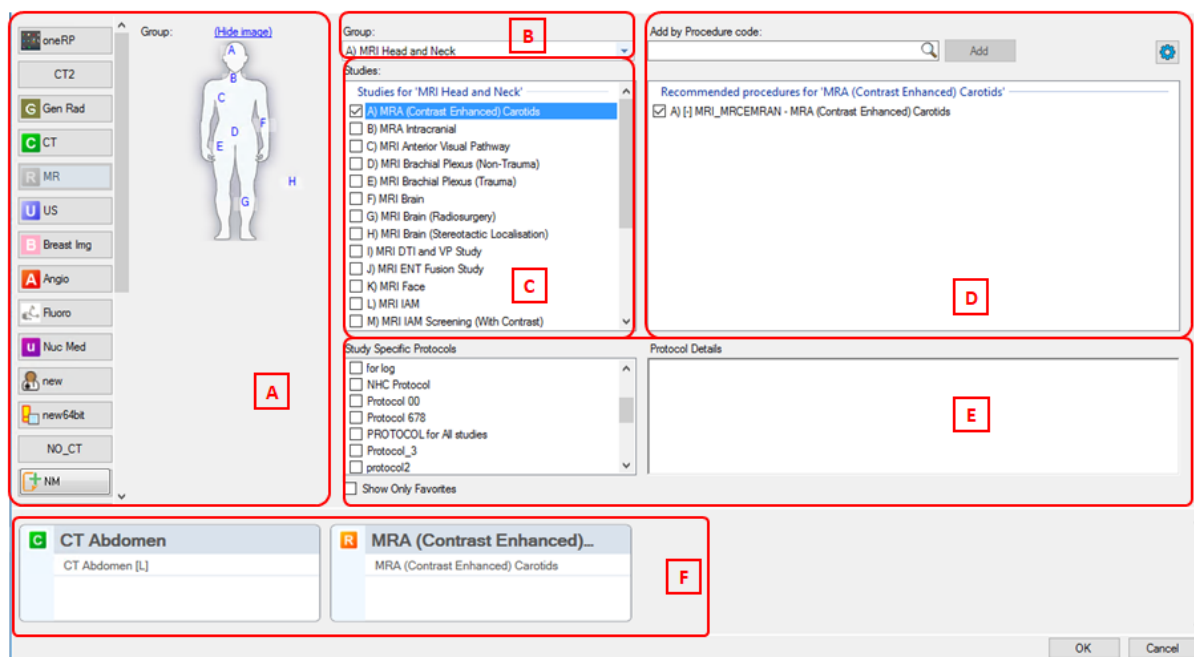
[Procedure Picker Window Components](#)

[Study Filters](#)

Procedure Picker Window Components

Click the **Add/Edit** button below the **Procedure Selection** section in the [Schedule form](#) to open the **Procedure code selection** window (Procedure Picker). The exams (studies) and procedures you select here will then appear in the **Schedule** form. The studies and procedures available to you for selection are affected by the scheduling group assigned to you. See [Study Filters](#) for the selection of scheduling groups.

Procedure Picker Window Components



	Description	Function
A	Filter buttons for study groups	Buttons showing the study groups for which you have scheduling permissions (based on the scheduling group assigned to you). If the site is so configured, you can click a button to display an image of a body outline and markings of the different body parts. Click a body part in the image to display the study group for that body part in the Group box. Alternatively, you can use the Group drop-down to select a study group. You can display or hide the image by clicking Show/Hide Image . At the bottom of the list, separated by a space, are buttons for study series.
B	Group	The Group drop-down list includes all study groups (equivalent to RPs) which you have permissions to schedule, as defined in the scheduling group (s) assigned to you. An RP normally comprises the modality type and body part, for example CT Head and Neck or Angiography Abdomen. The Group drop-down list is named Series if you are selecting series studies and procedures.
C	Studies	The Studies list includes all the studies available for the selected study group. Each study included represents an SPS. When the studies are listed, check the required study or studies. The recommended procedures included in that study are displayed on the right-hand side.

	Description	Function
D	Procedures	A list of procedures proposed for the selected studies. For each procedure in the list, a prefix indicates laterality, for example [L], [R], or [B]. If no laterality is associated with the procedure, the prefix is [-]. NOTE: Laterality is propagated with the procedure throughout the workflow - order through SPS and PPS. If you wish to add procedures to the ones listed already, click the search icon in the Add by Procedure Code box and search for the procedure in the Procedure Code Search window. Select a procedure from the list, and click OK. In the Procedure Code Selection window (Procedure Picker), click Add.
E	Protocols	An optional component in the Procedure Picker, controlled by configuration. See your site administrator.
F	Summary	Tiles summarizing the selected studies and procedures, including laterality, if exists. Clicking on a tile updates the display in the upper part of the Procedure Picker to the study and procedures of that tile. Hovering over a tile allows you to delete a study or procedure from the selection in the Procedure Picker.

Study Filters

Study filters allow you to change scheduling group, filter modalities by organization structures, and determine default settings. Changes you make in the **Study Filters** window affect the list of study groups and studies available to you in the **Procedure Code Selection** window ([Procedure Picker](#)) and the modalities available in the calendar.

NOTE: A scheduling group is an association between study, modality, and availability template (as well as setting of patient type). Every RIS user who has permissions to schedule appointments is assigned at least one scheduling group.

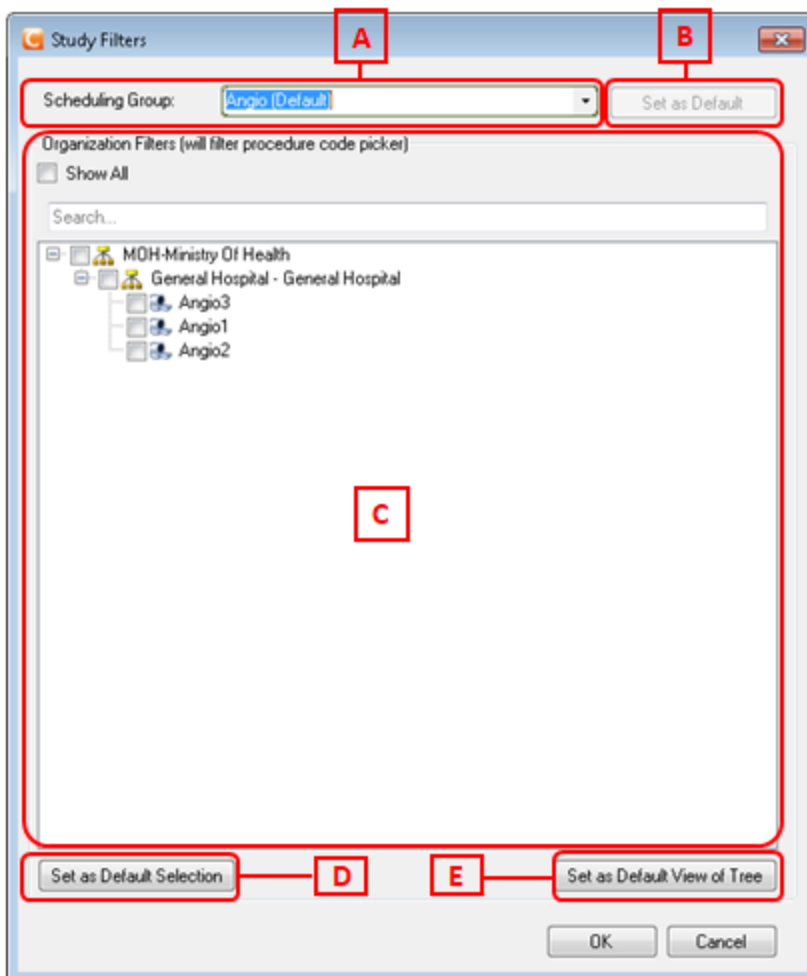
Study filters are available by clicking the cog icon either in the Procedure Picker window (top right) or in the Schedule form (in the action bar below the **Procedure Selection** grid).

NOTE: If you apply any filters, a filter icon is added to the cog .

Hover over the cog icon to display a tooltip indicating your current scheduling group and the current modality organization and protocol organization (if applicable). For information on protocoling, see your site administrator.



Click the cog icon in the Procedure Picker or in the **Schedule** form to open the **Study Filters** window.



	Description	Function
A	Scheduling Group	A list of all scheduling groups to which you are assigned. A scheduling group is a mapping of modality to study and availability template. Each scheduling group is set for a specific patient type. Changing the selection of a scheduling group in the Study Filters window affects the list of study groups and studies available to you in the Procedure Code Selection window (Procedure Picker). Scheduling groups highlighted with a color in the Scheduling Group list in the Study Filters window are groups that do not include at least one of the studies listed in the Procedure Selection grid in the Schedule form. If the Study Filters window is opened from the Procedure Picker, the colors denote studies that are checked in the Procedure Picker. If you change your scheduling group to a group that does not comprise all listed studies (a highlighted group), a message appears listing the studies that you will not be able to schedule and notifying you that these studies will be deleted. Clicking OK in the message box removes these studies from the Procedure Selection list in the Schedule form.
B	Set as Default	Sets the currently selected scheduling group as your default scheduling group.

	Description	Function
C	Main display area	Organization Filters An organizational structure tree containing all organization structure units that have at least one modality included in the selected scheduling group. You can select any organization structure level in order to show in the calendar only the modalities included in these organizational units. NOTE: Your selection in the Study Filters window affects the modalities and organizational structure shown in the Hide/show modalities setting in the Advanced Settings pane of the Schedule form. See Use Advanced Settings. Search Box Allows you to search for an organizational structure unit by name. If you enter the text CT, for example, the organizational tree displays all organizational units and modalities containing the letters CT. The searched text appears bold in the tree. Show All When selected (default), the organizational structure tree is disabled. All modalities included in the selected scheduling group are shown in the calendar. The Hide/show modalities setting in the Advanced Settings pane shows all modalities selected. You can then decide to show or not show some modalities in the calendar by canceling the selection of certain modalities in the Hide/show modalities setting. See Use Advanced Settings. You can also use My Views for controlling which modalities to show. See MyViews.
D	Set as Default Selection	Sets the currently selected modality organizational structure as the default for the selected scheduling group. The calendar will display only the modalities included in the selected organizational units. Selecting a default is not obligatory. You can also select Show All as the default organizational structure. This means that the calendar will display all modalities of the organizational structure.
E	Set as Default View of Tree	Saves the current organizational tree view as the default view. The tree will always open with this level of expansion when the window is opened.

Use Advanced Settings

The Advanced Settings pane allows you to set criteria that narrow down the automatic search for available time slots.

1. Click the Advanced Setting icon  to display the Advanced Settings pane.
2. In the Advanced Setting pane, expand the different window sections to set criteria.



The Search criteria pane allows you to [set time and availability filters](#)

The [Hide/Show Modalities](#) pane shows a list of modalities to be used.

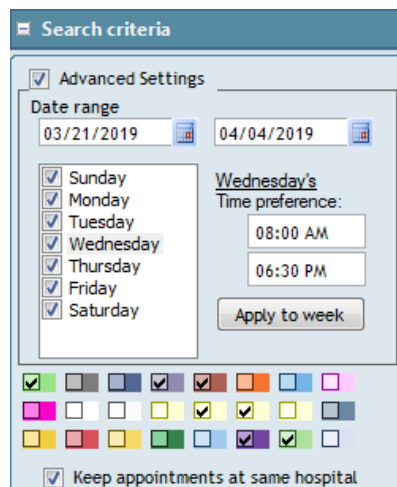
The Resource requests pane allows [Resource Scheduling](#).

The Legend pane shows [availability indications](#).

Set Time and Availability Filters

Selecting Time Criteria and Availability Indicators

Expand the **Search criteria** window section in [Advanced Settings](#) to display time and availability criteria that will affect the automatic search and book time slots that meet these criteria.



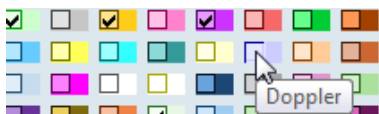
To enable the search criteria, select the **Advanced Settings** checkbox at the top of the window section.

The search criteria window section allows you to select a date range for the search and to set specific days of the week and specific hour spans during which the search will attempt to find available time slots.

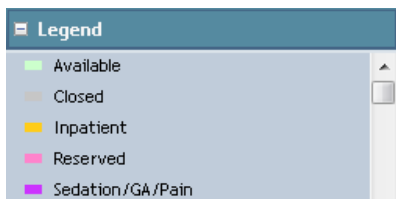
Additionally, you can limit the search by selecting specific availability indicators. Each modality availability indicator is represented by a different color.

To find out what indicator each color represents, you can do one of the following:

- Hover over the different colors to display a tooltip specifying the indicator which that color represents.



- Alternatively, you can expand the Legend window section to see descriptions of all availability indicator sections.



Keep Appointments at Same Hospital

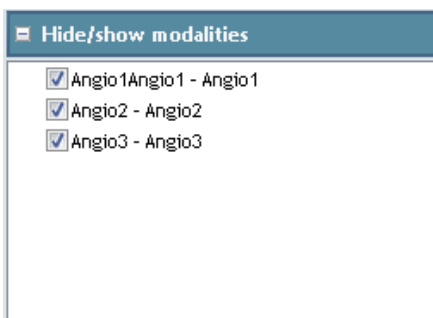
This option is selected by default.

For sites with several hospitals, this option makes sure that when you schedule multiple studies for a patient, the proposed bookings resulting from the automatic search will all be at the same hospital.

Cancel the selection of this option if your scheduling may be in different hospitals.

Hide/Show Modalities

Expand the **Hide/show modalities** window section in [Advanced Settings](#) to show a list of all the modalities that can be used for the listed studies, as detailed in your scheduling group.



The list of modalities is affected by your selections in the **Study Filters** window. See [Study Filters](#).

You can select or cancel the selection of each of the modalities. The calendar will show only the selected modalities and the automatic search will propose time slot bookings only on these modalities.

The **Show Unavailable Modalities** option may appear at the bottom of this window section, depending on configuration and on your selection in **User Preferences**. See [Hiding Unavailable Modalities](#) for a description of the **Hide unavailable modalities** option in User Preferences.

Unavailable modalities are modalities that have less than five consecutive minutes available in a day.

Select this checkbox to include such modalities in the calendar view.

Automatic Scheduling

Appointment booking may be done either by manually double-clicking a time slot in the calendar or by letting the system automatically search for, and propose, the first available time slot. This topic explains the automatic scheduling process. See [Manual Scheduling](#).

Book Appointments for a Single Study

To automatically schedule a study listed in the [Procedure Selection](#) list, click **Search**. The system proposes the first available time slot on the appropriate modality, taking into account the availability and priority of the modality, the study duration, and the advanced settings, including availability indications, organizational structure, searching in same hospital, and resources required. See [Use Advanced Settings](#).

The search starts from the day currently displayed in the calendar appointment and covers 14 days ahead (configurable). It searches for the first available 50 slots (configurable).

The first proposed booking is marked on the calendar as a white time block. You may then click the **Next** and **Previous** buttons to move the proposed booked time slot to the next (or previous) available time slot. When you exhaust all the time slots found by the search engine, no more available time slots are proposed for booking.

NOTE: If you click **Search Next Day**, **Next Week**, **Next Month**, or **Next Year** rather than **Search**, the calendar will display these times, and the search will start from there.

Book Appointments for Multiple Studies

If the [Procedure Selection](#) grid lists more than a single study, the search for available time slots is done for all listed studies. In these cases, in addition to searching for the nearest available time slots, the search attempts to book the different studies as close to each other as possible in terms of time slots (taking into account exam durations). To have all studies booked on modalities located at the same hospital, make sure the option **Keep Appointments at Same Hospital** in the [Advanced Settings](#) pane is selected.

Book Appointments for Study Series

Some imaging examinations comprise a series of studies. These are available in the **Procedure Code Selection** window ([Procedure Picker](#)) via a Series button.

The studies in a series need to be performed in a certain order and with a certain time interval between them. For example, in nuclear medicine, a study in which the patient is injected radioactive material must precede the study in which the patient is scanned. The time slot for which the system searches must include the duration of both studies in the series as well as the interval between them (unlike scheduling of multiple studies, where the search tries to book time slots that are as close to each other as possible).

The interval between the two studies of the series in the current example may allow for some flexibility, 90-120 minutes, for example, but the scheduling will not propose a time block with a larger interval. You may move the studies manually away from each other. However, you must remain within the allowed interval. If

the scheduled interval between the two studies is booked for the maximum allowed (120 minutes, in the current example), trying to move one of the studies (the scan, for instance) will prompt a message asking you whether to change the booking of the first study (the injection) as well.

NOTE: Intervals may be set to zero, for emergency cases, for example. See your site administrator.

See:

[Modality Priority](#)

[Delaying a Search](#)

Modality Priority

Modality priority allows sites to assign lower priority to older equipment, for example. A 16-slice CT takes much longer to perform a scan than a new 64-slice CT, so is often given lower priority for all studies.

As modality priority is based on the type of study, it is possible to prioritize for efficiency based on groups of exams. For example, the site may prioritize MR exams using a certain coil on a specific modality to avoid changing the coil between exams.

If your site is configured to use modality priority, the search for the next available time slot following the currently proposed booking takes into account the modality priority rather than time availability.

The search will always try to have the modality fully booked before it goes on to the next one. For example, an appointment is booked for 09:00 o'clock on Modality A, which has priority 1, and the next available time slot is at 09:15 on Modality B, which has priority 2. The next available time slot after 09:15 is at 09:30 on Modality A. Clicking **Next** in the **Procedure Selection** grid in the [Schedule form](#) grid to find the next available time slot will propose a booking at 09:30 on Modality A because of its higher priority rather than at the earlier hour of 09:15 on Modality B, which has a lower priority.

Delaying a Search

Certain patient types are associated with a delayed search for an available time slot, for example, patients who require several days of preparation prior to the exam. For such patients, the **Delay** button in the **Procedure Selection** grid in the [Schedule Form](#) grid displays a number of days by which the search will be delayed. When you click Search for such a patient, the starting point of the search for an available time slot will be delayed by the set number of days starting from today (rather than from the day currently displayed in the appointment calendar).

Resource Scheduling

For resource scheduling see:

[Indication of Requested Resources](#)

[Indication of Scheduled Resources](#)

[Add Resources Manually](#)

[Change Scheduled Resources](#)

[Define Resource Groups](#)

Indication of Requested Resources

If a study is set to require one or more resources, the **Procedure Selection** grid in the [Schedule](#) form includes an indication of the number of resources required for performing the selected procedure.

When you add a study to the Procedure Selection grid in the Schedule form, the Resources column displays x/y, reflecting the number of scheduled resources (x) out of the requested number of resource (y). In the following illustration, the figure in the Resources column in the Procedure Selection grid, 0/2, indicates that two resources have been requested for the study, and that these resources have not been scheduled.

		Request	Study	Start time	Minutes	Modality	Mod	Resources
▶	✗	US ABDOMEN - PELVIS	Ecotomografía de Abdomen A B R		15		0	0/2

The automatic search and manual booking take into account not only the modality availability and other settings you selected, but also the availability of resources requested for the procedure.

The availability colors in the calendar reflect not only the modality availability but also the availability of resources requested for the study. For each study, if there is at least one available resource, the color reflects the modality availability. If no resource is available, the time slot in the calendar appears as unavailable.

To see what type of resources has been requested, expand the Resource requests section of the [Advanced Setting](#) pane. In the following illustration, the type of resource requested for the selected study in the Procedure Selection grid is Nurse.

Resource requests

Type	Prio	Resource	Selection	..
▶ Nurse			Auto	...

Add Remove ☐ Ignore Priority

Indication of Scheduled Resources

When the study is scheduled, and a time slot is marked in the calendar, the Resources column in the **Procedure Selection** grid in the [Schedule](#) form changes to indicate that all [requested resources](#) have been scheduled. For example, if two resources are requested for the procedure, 0/2 would become 2/2 when the two requested resources are scheduled.

		Request	Study	Start time	Minutes	Modality	Mod	Resources
▶	✓	US ABDOMEN - PELVIS	Ecotomografía de Abdomen A B R	25/03/2019 11:45	15	ECLAEC03	0	2/2 (1, 2)

In the [Advanced Settings](#) pane, Resource Requests displays the following information:

- Resource type—The resource role.
- Resource name.
- Resource priority— The priority of the booked resource. Resource priority allows the site to assign a higher priority to senior, more skilled, staff for certain advanced studies. Junior staff may be given a higher priority for the less advanced exams. This allows both senior and junior resources to be used as efficiently as possible. You may still manually assign a lower priority resource if a high priority resource is unavailable for an earlier time slot.

Resource priority takes precedence over time availability. If a resource has high priority, the scheduling will attempt to schedule this resource even at the cost of selecting a later time slot. The resource priority is shown in parentheses in the **Procedure Selection** grid in the [Schedule](#) form.

- Method of selection—An indication of whether the scheduling of the resource was done automatically by the system while searching the availability of all potential resources, or whether the scheduling took into consideration the availability of a specific resource selected manually. See [Add Resources Manually](#).

Resources can also be selected as groups. See [Define Resource Groups](#).

Resource requests					
	Type	Prio	Resource	Selection	...
▶	❗ Radi			Group	...
	Radi	2	Doe	Auto	...
	Radi	1	Smith	Manual	...

Add Resources Manually

You may add a specific resource from the [Advanced Settings](#). When you book appointments using the automatic search, the system will look for the availability of the particular resource you have added.

NOTE: If you do not add resources manually, the automatic search will search for the availability of all potential resources rather than a specific one.

1. Click the search icon of the **Resource** column in the [Resource Requests](#) grid.

Resource requests					
	Type	Prio	Resource	Selection	..
▶	❗ Nurse			Auto	...
❗	Radiolo			Auto	...

2. In the **Person Resource Search** window, click **Search**. To narrow down the search, you can first start typing a code or a last name or select a role, and then click **Search**.
3. From the list of available resources, select a resource and click **OK**.

Change Scheduled Resources

Person Resource Search

Code Search

Last Name Reset

Resource Role Key

ID	Last Name	Role
▶ 123456	Doe	NUR

OK Cancel

- The resource name appears in the **Resource** column in the **Resource Requests** grid, and the value in the **Selection** column changes to **Manual**.

Resource requests					
	Type	Prio	Resource	Selection	..
	Nurse		Doe	Manual	...
▶ !	Radiolo			Auto	...

Change Scheduled Resources

To change a requested resource, you can do one of the following:

- Right click the booked time slot in the calendar, hover over **Change Allocated Resources** and click a resource.

3:25 AM for 155 min (Adrenal Venous Sampling).

Zoom Level
Reset Study Duration
Remove Appointment
Change Allocated Resources
Move Together

Nurse

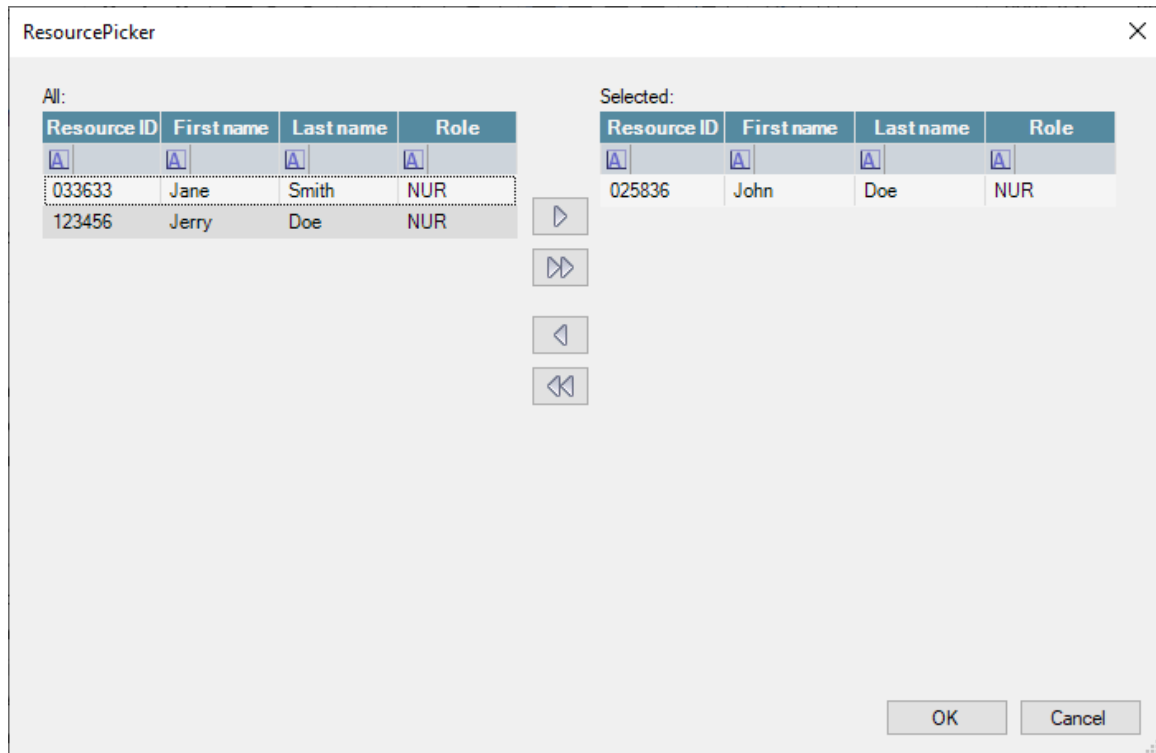
025836, Doe John (PR: 2)
033633, Smith Jane (PR: 1)

- Click **Add** or **Remove** in the **Resource requests** window to add or delete a row.

Resource requests					
	Type	Prio	Resource	Selection	...
▶	Nurse	1	resource1	Auto	...
Add Remove Ignore Priority					

Define Resource Groups

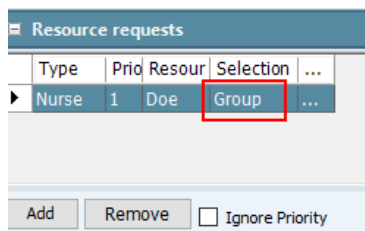
1. In the [Resource requests](#) window in [Advanced Settings](#), click the column marked as  to display the **ResourcePicker** window.



If no appointment is booked in the calendar, the **Selected** list shows all resources configured for the study, regardless of the resource location. If an appointment is booked on a specific modality, the **Selected** list shows only the resources configured for this modality's resource location.

2. From the list in the left hand side of the **ResourcePicker** window, select resources and move them to the **Selected** column to create the group. Use the left and right arrows to move resources between the columns.

The resources appearing in the **Selected** list on the right-hand side are the members of the group you are creating.



When you search for available time slots by clicking the **Search** button in the [Schedule](#) form, the system will look only for resources that are members of the group you have created.

Manual Scheduling

Booking an Appointment for a Single Study

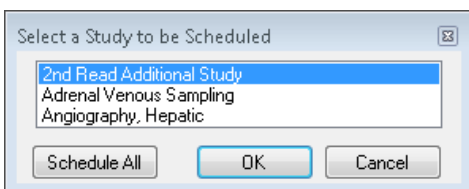
To schedule an appointment manually, double-click a time slot in the calendar. A proposed booking for the study in the **Procedure Selection** grid in the [Schedule](#) form is marked in the calendar as a white block. The appearance of the proposed booking is the same as that of an [automatic scheduling](#). However, unlike automatic scheduling, where an appointment cannot be booked in the past or when a modality is closed, for example, manual booking is always possible.

NOTE: Even though manual booking is possible, the booking still needs to be validated against user scheduling permissions. See your site administrator.

Booking Appointments for Multiple Studies

If the **Procedure Selection** grid in the [Schedule](#) form lists more than a single study (for example you added studies via the [Procedure Picker](#) or you are editing a study that was originally scheduled together with other studies) and you double-click a time slot on a certain modality, a booking will be proposed only for studies that can be performed on that modality.

If the modality on which you are performing the manual scheduling is appropriate for more than one of the listed studies, a **Select a Study to be Scheduled** window appears, in which you select which of the studies you would like to book an appointment for. You can also select **Schedule All** to schedule all studies that can be booked on that modality.



Booking Appointments for a Study Series

Series of studies need to be performed in a certain order and within a defined time interval between them. See Book Appointments for a Study Series in [Automatic Scheduling](#). If the manual booking of the series does not match the order or time interval set for that series, a message is displayed in which you determine whether to keep to the original series settings or not.

The manual time slot will be proposed, overriding the original series settings. (The original settings remain unchanged).

Manage Proposed Bookings

Proposed bookings appear as white blocks in the calendar. The details that appear on that time block include the procedure description and booked time. Additional details appear when you hover over the booked time slot. Both the text in the marked booking in the calendar and the additional details are configurable. Color strips on the white block indicate validity.

See:

[Manage Active Appointments](#)

[Manage Non-Active Appointments](#)

Manage Active Appointments

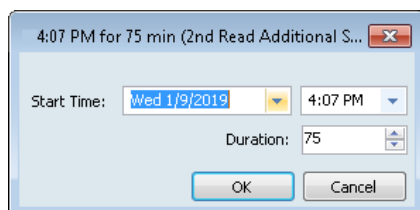
Once a booking has been proposed (either by an automatic search or by manual booking) and is marked as a white time block in the calendar, the appointment remains active throughout the scheduling session until you save the scheduling. Right-clicking an active appointment allows you to remove the appointment, reset its duration if it has been changed via the **Duration Modifier** button, change zooming, and select an option of moving appointments together.

NOTE: A booking marked in the calendar but not yet saved is not reserved in the system and therefore may be overridden by a different user.

Change a Proposed Time Slot Booking

You may change the proposed time slot in one of the following ways:

- Drag the white block marking the appointment to a different time slot (or a different modality) in the calendar.
- Double-click a different time slot in the calendar.
- Double-click the time slot to open a window in which you can set new start and end times and a different duration.



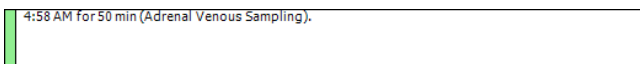
Delete Proposed Time Slot

To delete a time slot booked for an appointment, click on the time slot and press the Delete keyboard key or right click the appointment and select **Remove Appointment**.

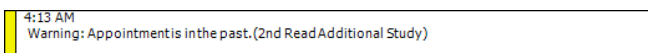
Appointment Validity Indicators

Proposed time slot bookings are marked with colors on the left-hand side of the white block on the calendar. The colors are configurable. See your site administrator.

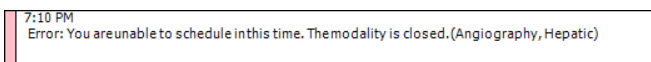
A valid booking may be indicated by green.



A warning may be indicated by yellow. For example, if the booking is in the past (manual booking). A warning message is displayed, but it would be possible to save the proposed booking.

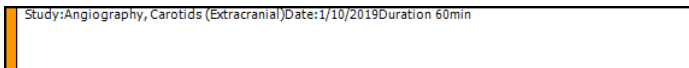


An error may be indicated by pink. For example if you are attempting to book an appointment at a time when the modality is closed. An error message is displayed and the proposed booking will not be saved. The study will be marked by an  in the **Procedure Selection** grid in the [Schedule form](#) to indicate that the study has no valid booking.



Manage Non-Active Appointments

Non-Active appointments are appointments that are saved in the system. They are indicated by default by an orange color (configurable. See you site administrator).



Right clicking a non-active appointment allows you to display details, change zoom level and edit the appointment. Clicking **Edit Appointment** opens a new session of the [Schedule form](#) designated for editing the scheduling (same as Edit Schedule action).

NOTE: You cannot work in the same session on active appointments that are in the process of being scheduled and non-active appointments with a saved scheduling.

Preparation Time

The Preparation Time capability allows distinction between preparation time and actual scanning time within the overall exam duration, thus affording more effective scheduling and modality utilization in cases when a patient is scheduled for two or more successive exams requiring the same type of preparation on the same modality, for example a Right Knee Ultrasound exam immediately following a Left Knee Ultrasound exam, or a CT Neck exam immediately following a CT Head exam.

NOTE: This feature is applicable to both single studies and studies that are part of a scheduled series.

See:

Preparation Time Calculation

Duration Modifier

Preparation Time Calculation

For any two successive exams requiring the same preparation time and scheduled for the same patient on the same modality, the scheduled duration of the second exam becomes shorter than that of the first exam, as the second exam now does not need to include the preparation time already performed on the patient for the first exam. For example, a 30-minute Knee Ultrasound exam may be set in the system to include a 10-minute preparation time and 20-minute scanning time. If a Right Knee Ultrasound is scheduled to immediately follow a Left Knee Ultrasound, the scheduled duration of the Right Knee Ultrasound in the [Schedule form](#) is automatically reduced to 20 minutes.

Schedule

Procedure Selection									
		Request	Study	Start time	Minutes	Modality	Mod	Resources	
▶	✓	US	US Ext. Lower	US Knee - Left	01/01/2020 12:45	30	NewModali	0	0/0
	✓	US	US Ext. Lower	US Knee - Right	01/01/2020 13:15	20	NewModali	0	0/0

<Patient Type Emergency <Duration Modifier 0 [Reset Resources] [Add / Edit] [Delete]

Org 1 All modalities Bug 30515 Default My View Walk In test

Zoom Show Details Day View

US Knee - Left, US Knee - Right
TUS2 - OT
HB11

11

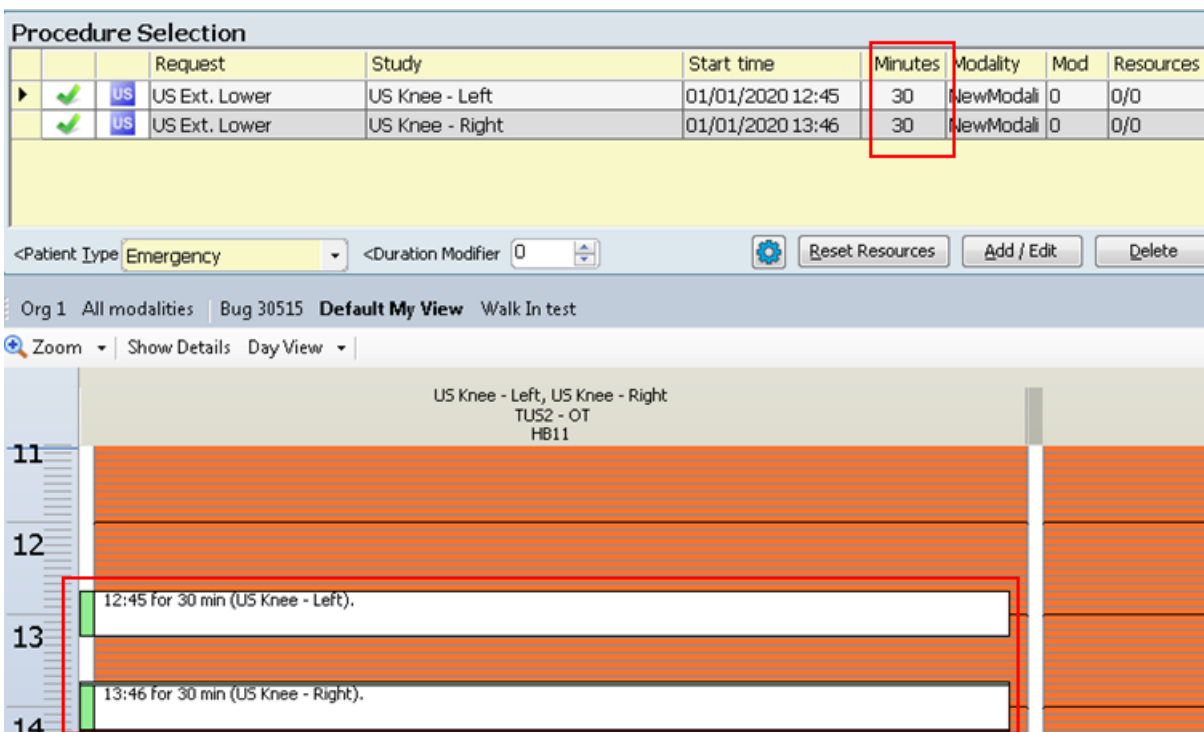
12

13

12:45 For 30 min (US Knee - Left).

13:15 For 20 min (US Knee - Right).

Dragging the second exam in the calendar to a different time slot that does not immediately follow the first exam causes the duration in the calendar to return to the original set duration that includes both the preparation time and the actual scanning time (30 minutes in this example).



If the preparation time of the first exam is set in the system to be longer than that of the second exam, the duration of the second exam is reduced to its actual scanning time.

If the preparation time of the first exam is set to be shorter than that of the second exam, the total duration of the second exam will comprise of its actual scanning time and the 'missing' preparation time, so that the overall duration for the first and second exams remains sufficient.

Duration Modifier

Use the Duration Modifier to increase or decrease overall exam durations. However, you cannot decrease an exam duration below a certain value (see your site administrator).

NOTE: Changes performed using the Duration Modifier never affect the actual scanning time, only the overall duration.

		Request	Study	St
✗		CT Head and Neck	CT 3D Face	
✗		MRI Head and Neck	MRA Intracranial	
✗		MRI Head and Neck	MRI Anterior Visual Pathway	

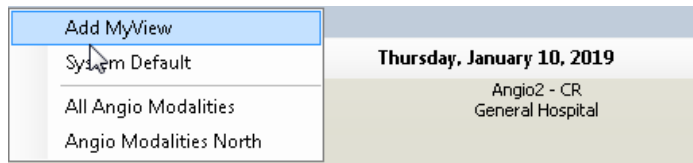
Patient Type: Day Surgery (DS-NCC) Duration Modifier: -5

Save Calendar Views as MyViews

The MyView capability allows you to save shortcuts for calendar views for easy access in the future, including all advanced settings you used. For example, if it is convenient for you to have a view that includes modalities only from a certain area of the organizational structure, you may determine the modalities you want displayed via the Advanced Settings pane, and then save the view under MyView. The next time you want this view displayed, you'll be able to use the MyView shortcut rather than re-set the modalities via the Advanced Settings pane.

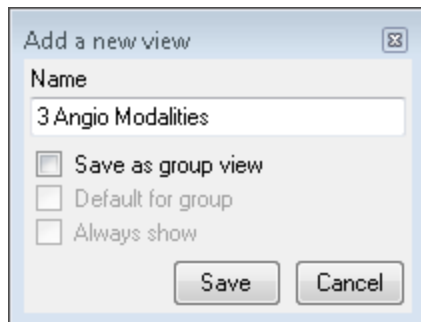
To set a calendar view as MyView:

1. Right-click the grey strip located above the calendar title (the date of the displayed day), and select **Add MyView**.



2. In the **Add a new view** window, enter the name of the view. You may want to save the view as a group view, which will make the view available to all members of your scheduling group. See [Study Filters](#) for a description of scheduling groups.

You can also determine which view will be your default view.



3. Click **Save**.

The views you created appear in the gray strip above the calendar. Views saved as group views appear to the left of the splitter. The current view is bold.



NOTE: MyViews - both individual and group views - are associated with scheduling groups. If you switch to another scheduling group other views may be displayed (see [Study Filters](#)).

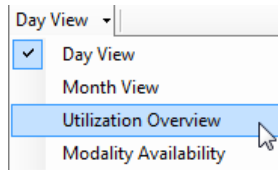
NOTE: Selecting settings in the Advanced Settings and saving them as MyViews does not affect the original setting determined in the Customization Studio editors. For example, indicators selected in the Availability Indicators editor as included in the search and therefore appear as selected in the

[Advanced Settings](#) pane will remain selected for other views, even if you canceled their selection for a specific MyView.

View Modality Utilization

To display a list showing the level of utility of each of the modalities currently displayed in the calendar:

1. From the Views drop-down menu immediately above the calendar, select **Utilization Overview**.



The calendar is replaced by a list of modalities showing the percentages of usage of each of the currently displayed modalities.

2. To display the level of utilization over a specific period, set the dates and times on the left-hand side. You can also choose to display only some of the modalities by selecting or canceling the selection of the modalities on the left-hand side.

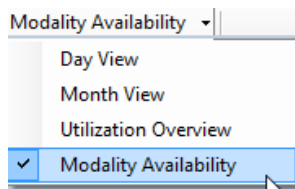
 A screenshot of the 'Utilization Overview' view in a software application. The interface includes a 'Date range' section with date pickers for '03/21/2019' and '04/20/2019'. Below this is a list of days of the week with checkboxes, all of which are checked. To the right of the days is a 'Wednesday's Time preference:' section with two time pickers set to '05:00 PM' and '04:30 PM', and an 'Apply to week' button. At the bottom left, there is a list of modalities with checkboxes: 'Angio1Angio1 - Angio1', 'Angio2 - Angio2', and 'Angio3 - Angio3', all of which are checked. An 'Apply' button is at the bottom center. On the right side, there is a table showing the usage percentage for each modality.

Modality	Usage %
Angio1Angio1: General Hospital -	0
Angio2: General Hospital -	65
Angio3: General Hospital -	70

View Modality Availability

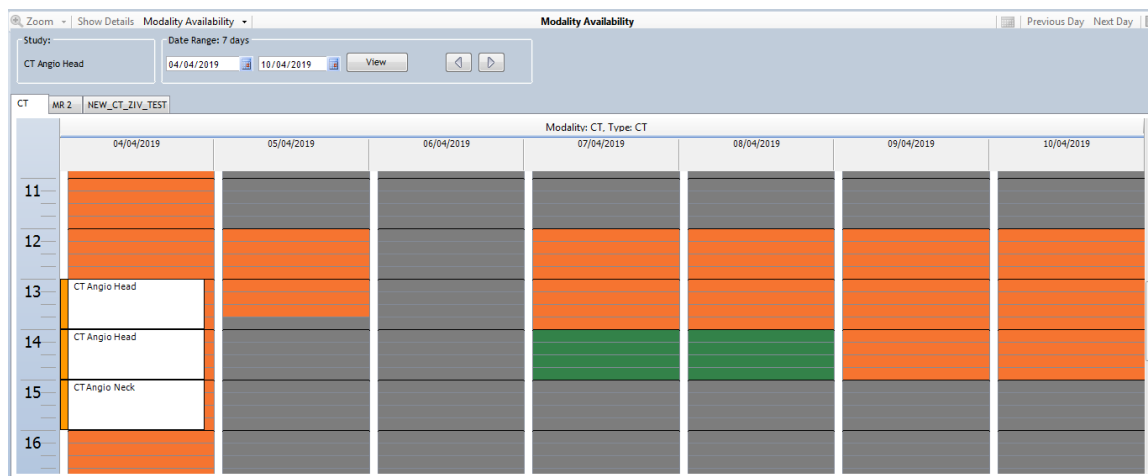
You can display in the calendar a view of the modality rather than a day or week, and show the availability of this modality each day for a period of time you define. For example, you may find it useful to see the availability and booked appointments of a particular modality over the entire week.

1. From the Views drop-down menu immediately above the calendar, select **Modality Availability**.



2. Define the study and period of time.

The calendar displays the modality availability by days for the defined period of time. Each column represents a day. To view the different modalities, click the modality tab above the columns.

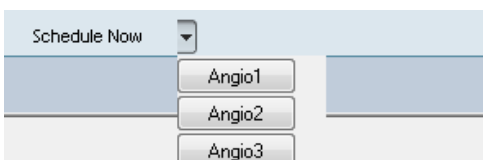


Schedule Walk-In Patients

You may need to schedule an appointment for a walk-in patient. The [Schedule](#) form of walk-in patients may differ from that of other patients and depends on RIS action settings and data window configuration. For example, the **Search** button may be replaced by **Schedule Now**, and the Schedule form may appear without a graphic display of the calendar and modalities.

To schedule an appointment for a walk-in patient using a **Schedule Now** button:

From the **Schedule Now** drop-down, select a modality.



The appointment is scheduled on the modality in the present time, and the booking is shown in the calendar area. If the RIS action is set to hide the calendar, the booking is shown in textual form.

NOTE: If you have chosen not to hide the calendar, you may click in the modality to manually book the appointment.

NOTE: Scheduling of walk-in patients may overbook previously booked appointments.

User Preferences

Certain user preferences offered by RIS affect the Scheduling operation.

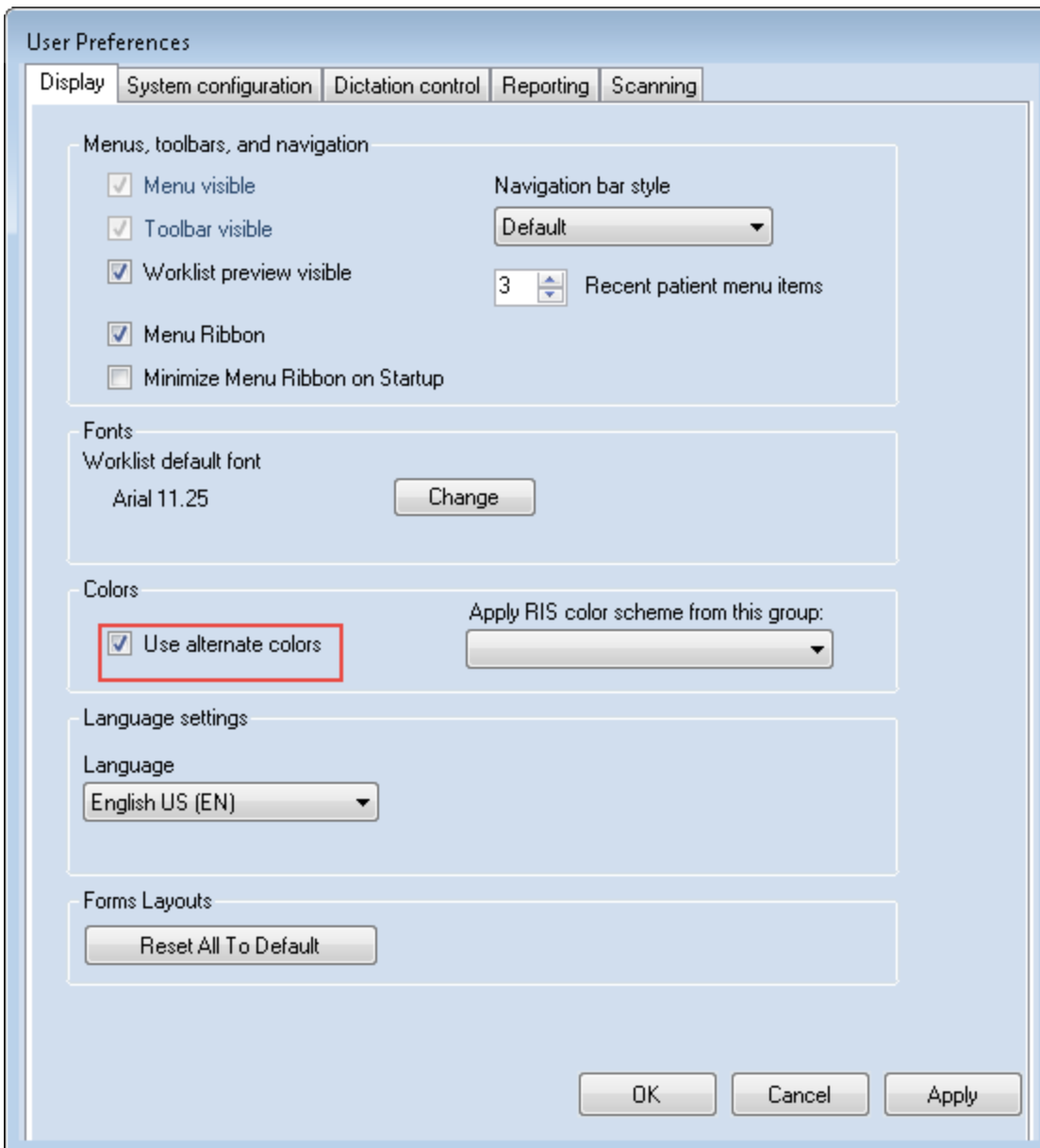
To display User Preferences,

From the **Tools** ribbon, select **User Preferences**.



Use Alternate Colors

In the **Display** tab, you can choose to display alternate colors. Alternate colors are set in the Availability Indicators editor. See your system administrator for setting alternate colors.



The image shows a 'User Preferences' dialog box with the 'Display' tab selected. The dialog has five tabs: 'Display', 'System configuration', 'Dictation control', 'Reporting', and 'Scanning'. The 'Display' tab contains several sections: 'Menus, toolbars, and navigation' with checkboxes for 'Menu visible', 'Toolbar visible', 'Worklist preview visible', 'Menu Ribbon', and 'Minimize Menu Ribbon on Startup'; a 'Navigation bar style' dropdown set to 'Default'; a spinner for 'Recent patient menu items' set to '3'; 'Fonts' with 'Worklist default font' set to 'Arial 11.25' and a 'Change' button; 'Colors' with 'Use alternate colors' checked (highlighted by a red box) and an 'Apply RIS color scheme from this group:' dropdown; 'Language settings' with a 'Language' dropdown set to 'English US (EN)'; and 'Forms Layouts' with a 'Reset All To Default' button. At the bottom are 'OK', 'Cancel', and 'Apply' buttons.

User Preferences

Display System configuration Dictation control Reporting Scanning

Menus, toolbars, and navigation

☒ Menu visible

☒ Toolbar visible

☒ Worklist preview visible

☒ Menu Ribbon

☐ Minimize Menu Ribbon on Startup

Navigation bar style

Default

3 Recent patient menu items

Fonts

Worklist default font

Arial 11.25

Change

Colors

☒ Use alternate colors

Apply RIS color scheme from this group:

Language settings

Language

English US (EN)

Forms Layouts

Reset All To Default

OK Cancel Apply

Determine the Modality Display Order

In the **System Configuration** tab, you can determine the display order of modalities in the calendar. Available options are sorting by location/room or sorting by modality type.

User Preferences

Display System configuration Dictation control Reporting Scanning

Barcode scanning

Scan type
Patient ID

☒ Double-click after scan

Settings

☒ Show debug messages
☒ Show procedure picker image

Default Scheduling group
NHC_Scheduling_Group

Default Protocols organization

Default patient type
Day Surgery (D)

Scheduling

Modality sort order
Sort by location/room

☒ Hide unavailable modalities

Film Management

Folder selection mode
AllFolders

☒ Default to exam mode
☒ Show procedures

Inventory Items

☒ Notice when regenerating items

Procedure Search

Default Option:

<Keyboard>

☒ Allow RIS Keyboard Shortcuts

OK Cancel Apply

Hide Unavailable Modalities

In the **System Configuration** tab, the **Hide unavailable modalities** option appears if the configuration item HideUnavailableRooms is set to Y. Select this option to hide unavailable modalities (modalities with less than five consecutive available minutes) in the calendar in the [Schedule](#) form.

When this option is selected, the **Show Unavailable Modalities** option is added to the **Hide/Show modalities** section of the [advanced settings](#) in the Schedule form. You can select this option to display unavailable modalities in the calendar.

User Preferences

Display System configuration Dictation control Reporting Scanning

Barcode scanning

Scan type
Patient ID ▾

☒ Double-click after scan

Settings

☒ Show debug messages

☒ Show procedure picker image

Default Scheduling group
NHC_Scheduling_Group

Default Protocols organization

Default patient type
Day Surgery (D) ▾

Scheduling

Modality sort order
Sort by location/room ▾

☒ Hide unavailable modalities

Film Management

Folder selection mode
AllFolders ▾

☒ Default to exam mode

☒ Show procedures

Inventory Items

☒ Notice when regenerating items

Procedure Search

Default Option:
▾

<Keyboard>

☒ Allow RIS Keyboard Shortcuts

OK Cancel Apply

Select Settings

The **Settings** section in the **System Configuration** tab allows you to select the **Show procedure picker image** option to enable the display of an image near the filter buttons in the [Procedure code selection window](#) (Procedure Picker).

Settings

☒ Show debug messages

☒ Show procedure picker image

Default Scheduling group
NHC_Scheduling_Group

Default Protocols organization

Default patient type
Day Surgery (DS) ▾

You can also select a default patient type in the Default Patient Type drop-down list. The patient type you select here is the default type when you schedule an exam in a new order.

NOTE: When scheduling an order, if the default patient type is not set as part of the scheduling group in the Modality to Study Map editor, the default patient type of the scheduling group is selected.

The cog icon in the Settings section allows you to select a default scheduling group, default organization structure and a default view. See [Study Filters](#).

The settings section also allows you to set a default protocoling organization. See your site administrator for protocoling configuration.

Documenting

Radiographers and Technologists may need to use the exact same documentation for more than a single exam (study). The **Documentation** form allows users to perform a single documentation operation and automatically apply it to all studies selected for that purpose, thus saving them the need to open each of the studies in a separate window and perform copy and paste actions from one study to the other. The Document Together capability can be applied only to studies of the same status (Arrived, In Progress, or Exam Done) which belong to the same order, same patient, same modality type, and same Document Together group.

A Radiographer or Technologist using the Document Together capability chooses the set of studies requiring the same documentation and then selects the study that is to serve as the basis for the documentation of the other studies in the set (requires appropriate configuration). The user can also add studies to the set of initially selected studies after the documentation operation has begun. This may be required when, for example, while performing the scan, the user decides to perform an additional scan that does not exist in the worklist. If the newly added study belongs to the same group as the selected set, it will be added to the list of studies being documented under the same documentation operation. Additionally, the user may also add procedures to a study or change a study that was initially selected to be part of the set of studies requiring simultaneous documentation.

See:

[The Documentation form](#)

NOTE: Depending on the Philips RIS version installed and specific configuration implemented at your site, the User Interface of the documentation operation in the system you are using may present slight differences compared with the User Interface presented in this help. Consult your site administrator.

The Document Form

In addition to documenting a single exam (study), a radiographer or technologist uses the Document form to carry out simultaneous documentation of several studies.

See:

[Access the Documentation Form](#)

[Document Form components](#)

Access the Document Form

Simultaneous documentation of multiple exams (studies) is performed in the **Document** form.

NOTE: This form serves to document both a single study and multiple studies.

To open the form, in the worklist select the studies that are to be documented simultaneously and select the **Documentation Together** action from the Navigation bar. (For configuration of the action and action name, see your site administrator).

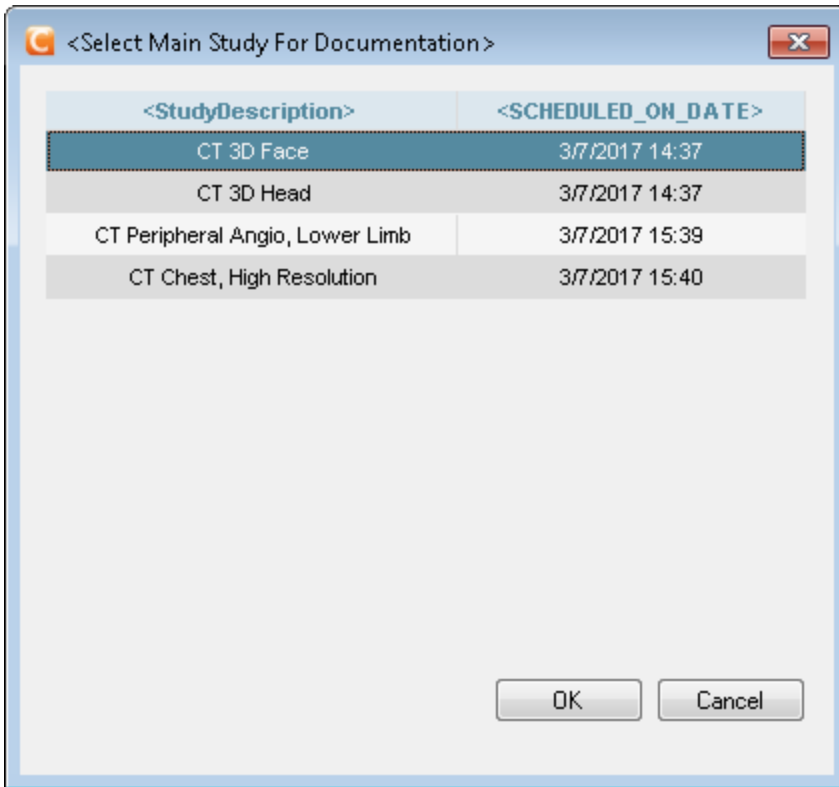
The screenshot shows a software interface with a left-hand navigation pane and a main worklist area. The navigation pane has three sections: 'Navigation' (with 'Cancel Order', 'Cancel Study', and 'View Order'), 'Patient' (with 'Patient Log', 'Patient History', and 'Add New Patient'), and 'Actions' (with 'Documentation' and '<QA Documentation Together>'). The 'Actions' section is expanded, and '<QA Documentation Together>' is highlighted with a mouse cursor. The main area shows a header 'Tech WL for: 3/7/2017' and a table of worklist items.

Flags	Ordered Procedures	Patient ID	Permission	Last Name	First name	Modality type	Status	Ordered pr
	CT 3D Spine	TEMP1037475...	0	AVIRA...	AVIR...	CT	Arrived	40091324
	CT 3D Face, C...	EM900004935	0	Inv		CT	Arrived	40091324
	CT 3D Face, C...	EM900004935	0	Inv		CT	Arrived	40091324
	CT Chest and...	4444	0	zed		CT	Arrived	40091324
	CT Chest and...	4444	0	zed		CT	Arrived	40091324

NOTE: The name of the Document Together action is configurable per site. See your site administrator.

Select the Primary Exam

If you selected more than one exam (study) in the worklist, the **Select Main Study for Documentation** window opens, where you select the primary study. The information you enter during the documentation operation in the study defined as the primary study serves as the basis for the simultaneous documentation and will be automatically copied to the other simultaneously documented studies.



NOTE: Some fields of the primary study may be configured to prevent their being copied to the other studies when the simultaneous documentation operation is executed. In such cases, these fields will appear only in the primary study. See your site administrator.

NOTE: The appearance of the **Select Main Study for Documentation** window depends on configuration. If the window is not set to appear, the first study on the list will automatically serve as the primary study. See your site administrator.

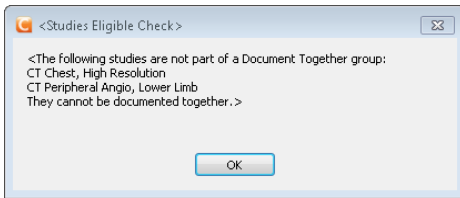
Click **OK** in the **Select Main Study Documentation** window.

Same Group Verification

When you have selected the primary study, the system checks whether all the selected studies belong to the same Document Together group.

If any of the studies you selected do not belong to the same group, an error message appears, listing the studies that do not belong to the group and therefore will not be included in the simultaneous documentation operation.

If any of the studies you selected do not belong to the same group, an error message appears, listing the studies that do not belong to the group and therefore will not be included in the simultaneous documentation operation.



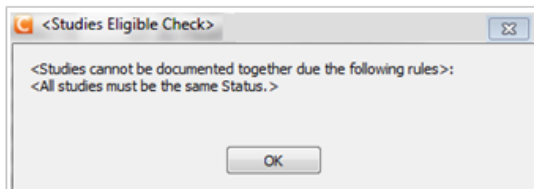
Eligibility Verification

In addition to the group check, the system performs a series of checks to verify the eligibility of the selected studies for simultaneous documentation. In order for the simultaneous documentation capability to be applied, the studies that are candidates for the operation must meet several conditions:

- Studies must have the same status (Arrived, In Progress, or Exam Done).
- Studies are scheduled on the same modality or modality type.
- Studies must belong to the same order.
- Studies must have the same Document Together group.

NOTE: If the start times of the earliest and latest scheduled study differ by more than a configured number of minutes, a warning message is displayed alerting the user to the time discrepancy and allowing them to continue with the process. See your site administrator for configuration issues.

If any of the selected studies does not meet one or more of these rules, an error is displayed:



Document Form Components

Following the [eligibility verification](#), the **Document** form opens.

The screenshot shows a software interface for patient identification and documentation. Red boxes and callouts identify the following components:

- A:** Patient Identification section at the top, containing fields for Patient ID, Gender, First Name, Last Name, Middle Name, and Age.
- B:** A large central section containing fields for Technologist 1, Technologist 2, Nurse, Radiologist, Notes, Start Time, End Time, Performed In (dropdown), Film Information (Digital, Films, Rejected, Retakes, Reason for Retakes), Radiation Safety, and History / Surgery.
- C:** The Performed Procedures table, which lists procedures and their associated studies.
- D:** Add and Change buttons located to the right of the Performed Procedures table.
- E:** The Inventory Items table, which lists items used during the scan.
- F:** The bottom status bar containing fields for Page, Ordered procedure ID, Scheduled procedure step ID, Scheduled date, First name, Last updated, Patient flagset, and Order flagset.
- G:** Paste button.
- H:** New study button.
- I:** Complete button.
- J:** OK button.

	Description	Function
A	Patient Identification	Details of the patient whose exams (studies) are being documented.
B	Technologist	Information you insert as part of the documentation process, including the technologist/radiographer details, scan time, film-related information, radiation-related information and information related to the patient's history or past surgeries.
C	Performed Procedures	A list of procedures performed in the studies being documented together. The list specifies the procedure and the study to which it belongs. All studies included in this list are documented simultaneously in a single documentation operation.
D	Add/Change Buttons	Buttons allowing you to add procedures to the list and to change studies.
E	Inventory Items	Information you insert relating to material and equipment that was used during the scan.

	Description	Function
F	Patient History	All prior studies of the patient whose studies are being documented.
G	Paste	Disabled when the Document form is first opened. When the Next button is clicked to open a documentation form for the next study, the Paste button becomes available in the new form. Clicking Paste copies information from the form that was open for the previous study to the newly opened form.
H	New Study	A button allowing you to add a study to the list of studies being documented. Only studies belonging to the same group as that of the studies listed in the Performed Procedures grid will be added to that list and included in the single documentation operation for the entire set. You can also add multiple studies.
I,	Complete	Click Complete to execute the documentation operation. Documentation information is copied from the study defined as the primary study to all studies included in the Performed Procedures list.
J	Next	Click the Next button to complete the documentation of the open form and opens a documentation form for the next study.

Perform Document Together Actions

When you document several exams (studies) together, you may perform the following actions:

[Add a Procedure to an Exam in the Performed Procedures List](#)

[Change an Exam in the Performed Procedures List](#)

[Add an Exam to the List of Documented Exams](#)

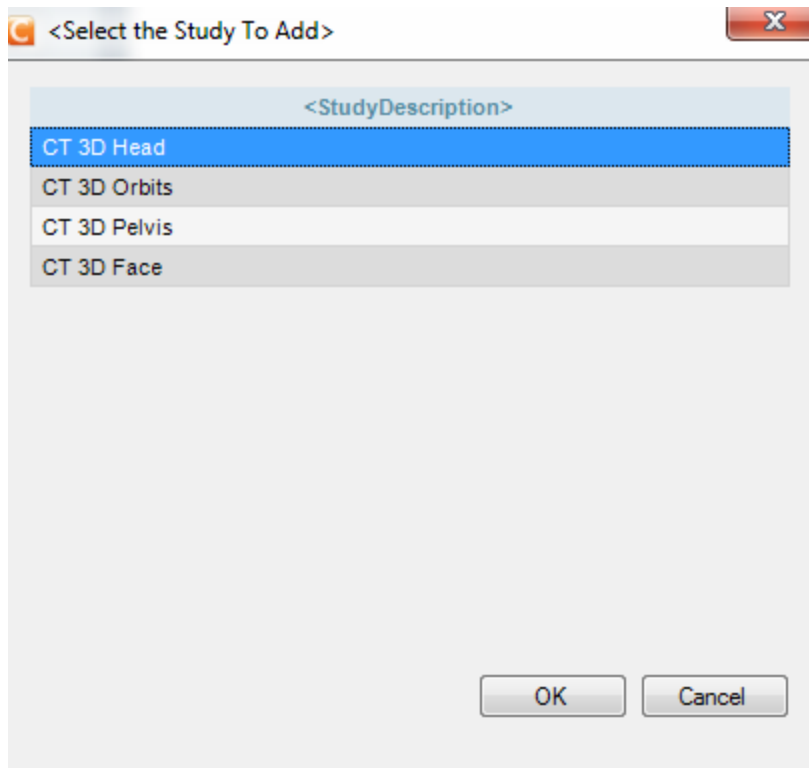
[Complete the Document Together Action](#)

Add a Procedure to an Exam in the Performed Procedures List

Every exam (study) listed in the **Performed Procedures** section of the [Document form](#) has at least one procedure. The list may include more than a single procedure per study.

You can add procedures to the listed studies.

1. Click **Add** in the **Performed Procedures** section.
2. In the **Select the Study to Add** window, select the study to which you would like to add the procedure and click **OK**.



An empty row is added to the **Performed Procedure** list of the [Document form](#).

3. Click the search icon in the **Procedure** column of the empty row.

	Study	Procedure	Laterality	Modifier Single
	CT 3D Head	CT_CT3DHEAD,CT 3D Head		
▶	CT 3D Head			
	CT 3D Face	CT_CT3DF,CT 3D Face		

4. In the **Procedure Code Search** window, search for the procedure you would like to add and click **OK**.

Procedure Code Search

Code

Description

Code	Description
VIR_HNL	Steroid and lignocaine joint/soft tissue injection
VIR_ANGCVCNT	CVC Non Tunnelled
VIR_ANGEMBH	Embolisation, Hepatic
VIR_ANGSTELB	Angioplasty, Lower Limb Arterial with Stent, Both
VIR_ANFOLLUP	Angiography, Follow Up Study
VIR_ANAVFAPLAL	AVF Angioplasty, Left
VIR_ANAVFMR	AVFistulogram, Right
VIR_ANAVGAPLL	AVG Angioplasty, Left
VIR_ANDILOTH	Dilatation - Others
VIR_ANGEVLTR	Endovenous Laser Therapy, Right
VIR_OTAN	Operating Theatre Angiography
VIR_ANGDRAO	Percutaneous Drainage, Others
VIR_ANGIORD	Thrombolysis, Mycotic Others

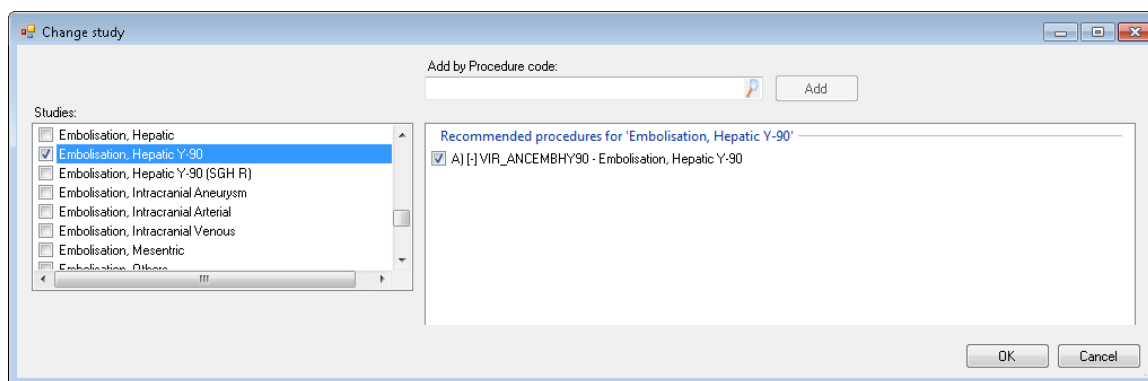
The procedure is added, with an indication of the study to which it belongs.

Study	Procedure	Laterality	Modifier Single
CT 3D Head	CT_CT3DHEAD,CT 3D Head		
CT 3D Head	CT_ANGIORD,CT Angiogram Renal Donor		
CT 3D Face	CT_CT3DF,CT 3D Face		

Change an Exam in the Performed Procedures List

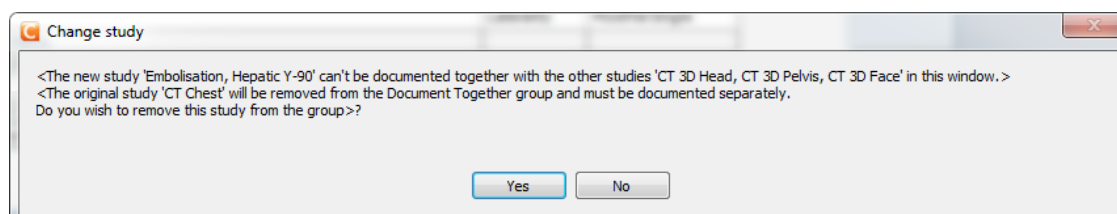
You may find that you need to change one of the exams (studies) that appear in the Performed Procedures list in the [Document form](#), for example if the study that was selected in the worklist is not the required study, and you actually need to perform another type of scan.

1. In the Performed Procedures section of the [Document form](#), select a study and then click **Change**.
2. In the **Change Study** window, select the study you want to perform and click **OK**.

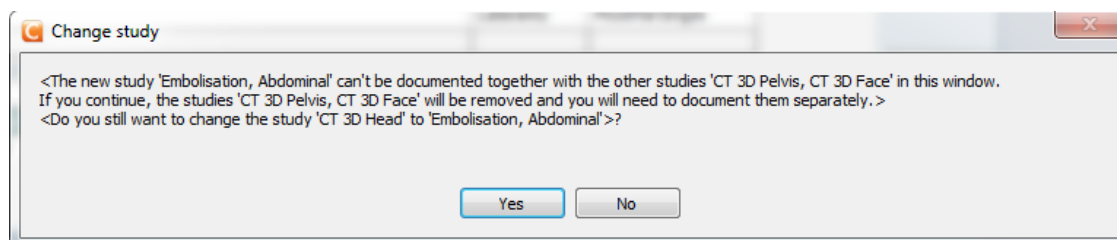


- If the study in the Performed Procedures list and the study with which you want to replace it are of the same Document Together group, the study is replaced, and the newly selected study appears in the list.
- If the study in the Performed Procedures list and the study with which you want to replace it are not of the same Document Together group and the study in the list is not the primary study, an error message appears, alerting you to the mismatch in Document Together groups.

Clicking **Yes** in the error message will cause the replaced study to be removed from the list. It will no longer be possible to document it together with the other studies in the list under the same documentation operation.



- If the study in the **Performed Procedures** list of the [Document form](#) and the study with which you want to replace it are not of the same Document Together group and the study in the list is the primary study, an error message appears, alerting you to the mismatch of Document Together groups.
- Clicking **Yes** in the error message will cause all of the listed studies to be removed from the Performed Procedures list. They will no longer be part of the current Document Together operation.

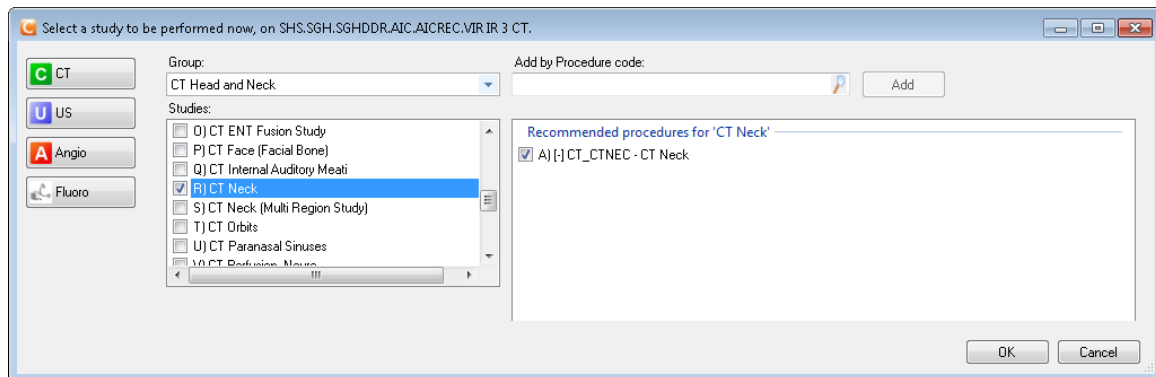


Add an Exam to the List of Documented Exams

You may add exams (studies) to the list of studies that will be included in the single simultaneous documentation operation you are currently performing (listed in the **Performed Procedure** list in the [Document form](#)). Adding a study may be done at any time. For example, if after you have already begun a scan, it becomes clear that an additional scan is needed that does not yet exist in the worklist.

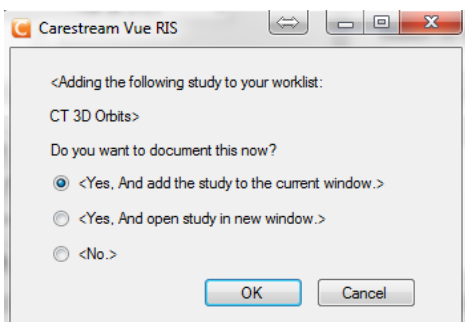
To add a study:

1. Click the **New Study** button at the bottom of the [Document form](#).
2. From the window that opens, select the study you want to perform and click **OK**.



Add an Exam that belongs to the Same Group

If the exam (study) you are adding belongs to the same group as the one being documented, the following message appears:



The message allows you to do one of the following:

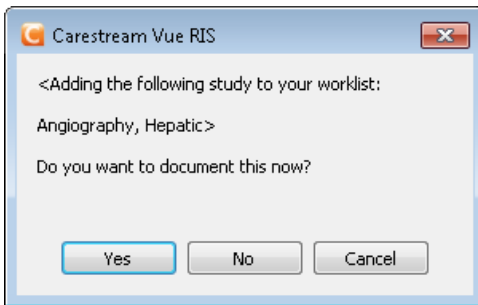
- Add the study to the current [Document form](#) so that it will be included in the **Performed Procedures** list and be documented together with the other studies in the list.
- Create a new study that will be opened in a separate documentation window. The current simultaneous

documentation operation will not be applied to this study.

- Create a new study without documenting it.

Add an Exam that Does Not Belong to the Same Group

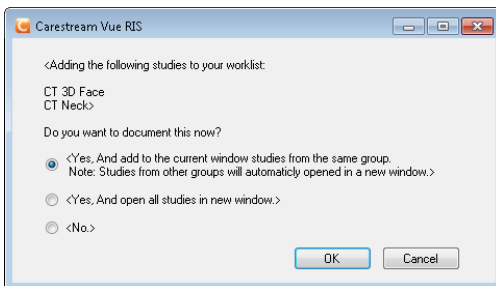
If the exam (study) you are adding does not belong to the same group as that of the studies being documented, the following message appears:



In this scenario, you are not offered the option to add the study to the current documentation window, as the newly added study is not of the same group and cannot be documented together with the studies listed in the **Performed Procedures** list of the current [Document form](#). The study will be added to the worklist, and you will be able to document it separately.

Add Multiple Exams to the Group

You may select multiple exams (studies) to be added to the currently documented set of studies. If some of the studies you wish to add belong to the same group as the currently documented studies and some do not, the following message appears.



Only the studies that belong to the same group as those in the current documentation window can be added to this documentation operation. The message offers you for these studies the same options as those described for a single study in [Add an Exam that belongs to the Same Group](#).

Complete the Document Together Operation

To save all the information you have inserted in the [Document form](#), including added or changed procedures and studies, click OK at the bottom of the Document form. This does not actually start the simultaneous documentation operation. It only saves the information, leaving all studies in the same status they were before.

To execute the simultaneous documentation operation, click **Complete** at the bottom of the Document form. This action copies all the information from the primary study to the other studies listed in the **Performed Procedures** section. The status of all documented studies changes to Exam Done.

To suspend the documentation operation, select **Discontinue** from the **Complete** drop-down menu. The documentation operation is not executed.

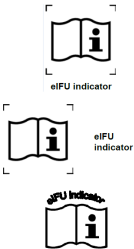
To resume the process, select **Start** from the **Complete** drop-down menu. The status of all documented studies changes to In Progress.

Acronym List

Acronym	Description
CT	Computed Tomography
DICOM	Digital Imaging and Communications in Medicine
EDI	Electronic Data Interchange
HIPPA	Health Insurance Portability and Accountability Act
HIS	Hospital Information System
HL7	Health Level 7
ID	Identity
IV	Intravenous
PACS	Picture Archiving and Communication System
PPS	Performed Procedure Step
RIS	Radiology Information System
RP	Requested Procedure
SPS	Scheduled Procedure Step
TC	Technical Component

Symbols Glossary

The following symbols may appear in the product documentation or on the labels attached to the product.

Symbols	Symbol Name	Symbols Description	Standard / Regulation Number & Name	Symbol Reference Number
	Manufacturer	Indicates the name and address of the manufacturer	EN ISO 15223-1:2016 ¹	5.1.1
	Date of manufacture	Indicates the date when the device was manufactured.	EN ISO 15223-1:2016 ¹	5.1.3
	Batch code	Indicates the full Software Release/Version number.	EN ISO 15223-1:2016 ¹	5.1.5
	Consult instructions for use	Indicates the need for the user to consult the instructions for use or electronic instructions for use (eIFU). When a symbol is accompanied by additional text, it denotes the location of the instructions for use.	EN ISO 15223-1:2016 ¹	5.4.3
	eIFU Indicator	When used to indicate an instruction to consult an electronic instructions for use (eIFU), this symbol is accompanied by an eIFU indicator. This indicator may represent the manufacturer's eIFU website or any other appropriate indication on the use of eIFU (e.g. "Refer to IFU Kit"). The indicator may be placed either alongside, beneath or surrounding the symbol.	EN ISO 15223-1:2016 ¹	5.4.3

Symbols	Symbol Name	Symbols Description	Standard / Regulation Number & Name	Symbol Reference Number
	Caution and/or Warning	WARNINGS are directions which if not followed could cause fatal or serious injury to a user, patient or other person, or could lead to clinical misdiagnosis, and/or loss or damage of patient- related data. Also: This symbol is used on the device label to highlight the fact that there are specific warnings or precautions associated with the device, which are not otherwise found on the label.	EN ISO 15223-1:2016 ¹	5.4.4



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