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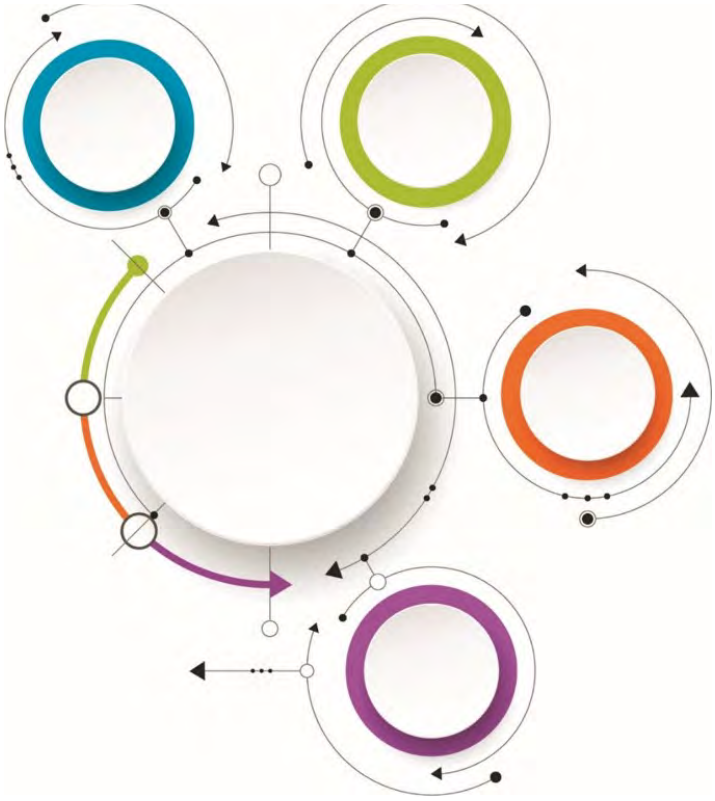

Sonosite Synchronicity Workflow Manager

Administrator User Guide

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Patent: www.sonosite.com/patents

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Introduction

This *Sonosite Synchronicity Workflow Manager Administrator User Guide* provides information about configuring and using Sonosite Synchronicity Workflow Manager.

Document conventions

The document follows these conventions:

- A **WARNING** describes precautions necessary to prevent injury or loss of life.
- A **CAUTION** describes precautions necessary to protect the products.
- A **NOTE** provides supplemental information.
- Numbered and lettered steps must be performed in a specific order.
- Bulleted lists present information in list format but do not imply a sequence.

Getting help

- FUJIFILM Sonosite Technical Support:

United States and Canada	+1 877-657-8118
Europe and Middle East	Main: +31 20 751 2020 English support: +44 14 6234 1151 French support: +33 1 8288 0702 German support: +49 69 8088 4030 Italian support: +39 02 9475 3655 Spanish support: +34 91 123 8451
Asia and Pacific	+61 2 9938 8700
Other regions	+1 425-951-1330 or call your local representative
Fax	+1 425-951-6700
Email	General: ffss-service@fujifilm.com United Kingdom: uk-service@fujifilm.com Europe, Middle East, and Africa: eraf-service@fujfilm.com Asia and Pacific: ffss-apacme-service@fujifilm.com
Web	www.sonosite.com

Software intended use

Sonosite Synchronicity Workflow Manager software allows you to transfer images, clips, reports, notes, and other data from your ultrasound system to your Picture Archiving and Communication System (PACS) using Digital Imaging and Communications in Medicine (DICOM) protocols. You can also use Sonosite Synchronicity Workflow Manager software to send your ultrasound study report to your Electronic Medical Record (EMR) or Electronic Hospital Record (EHR) system.

WARNING
Sonosite Synchronicity Workflow Manager is not intended for diagnostic purposes. Measurements or labels added to images using Sonosite Synchronicity Workflow Manager software are not intended for diagnostic use.

CAUTION
Healthcare providers who maintain or transmit health information are required by the Health Insurance Portability and Accountability Act (HIPAA) of 1996, the European Union Data Protection Directive (95/46/EC), and the General Data Protection Regulation (GDPR) to implement appropriate procedures: to ensure the integrity and confidentiality of information and to protect against any reasonably anticipated threats or hazards to the security or integrity of the information or unauthorized uses or disclosures of the information.

Sonosite Synchronicity Workflow Manager provides settings that enable you to meet the applicable security requirements listed in the HIPAA standard. Users are ultimately responsible for ensuring the security and protection of all electronic protected health information collected, saved, reviewed, and transmitted to and from the application.

NOTE
To protect patient confidentiality, remove all identifying information from patient images, files, or records before sending electronically.

Sonosite Synchronicity Workflow Manager overview

Sonosite Synchronicity Workflow Manager is a point-of-care ultrasound reporting system that streamlines clinical workflow while delivering administrative efficiencies with flexible credentialing tools. It provides a comprehensive solution to the administrative challenges faced by point-of-care ultrasound physicians, enabling standardization of unique workflows both within a department and hospital-wide, which increases efficiency and time spent caring for patients.

Sonosite Synchronicity Workflow Manager provides the following:

- **Simplified workflow** - The intuitive user interface allows for a short adoption period in the hospital department and less time spent on administrative tasks. With a built-in, simple DICOM viewer, the familiar workflow tools can be used on a computer, tablet, or mobile device.
- **Focus on education** - Designed with ACEP guidelines in mind, credentialing programs can be designed to suit your requirements. The configurable worksheets for quality assurance give you flexibility in any rapidly changing environment.
- **Worksheet-driven workflow** - The built-in worksheet templates can be configured to meet your department processes, driving your standardized workflow for quality assurance, credentialing, and exam billing.

- **Scalable to your environment** - From a single clinic to a whole hospital network, Sonosite Synchronicity Workflow Manager can be scaled to meet your requirements for standardization, consistency, and compliance.
- **Shortened implementation time** - Our team, dedicated to IT solution implementations, is with you every step of the way. By understanding your needs from the beginning, your installation of Sonosite Synchronicity Workflow Manager can be completed with little interruption to you and in a time frame that suits your schedule.

Administrator roles

There are two types of administrators within Sonosite Synchronicity Workflow Manager: a System Administrator and a Department Administrator. The roles between the two are almost identical; however, the System Administrator has additional permissions described in the following sections:

- Creating a new user profile [4]
- Deactivating a user profile [5]
- Configuring login security [28]
- Configuring the connection to the LDAP directory [28]
- Configuring the SMTP server [28]
- Configuring EMR submissions [29]
- Configuring DICOM server connections [30]
- Configuring system settings [31]

Managing users and user groups

Managing users

In Sonosite Synchronicity Workflow Manager, you can add users two ways:

- **Automatically** by configuring the LDAP directory
- **Manually** by creating a user profile within Sonosite Synchronicity Workflow Manager

LDAP is a standards-based mechanism for interacting with directory servers. It's often used for authentication and storing information about users, groups, and applications, but an LDAP directory server is a general-purpose data store that can be configured with Sonosite Synchronicity Workflow Manager (if your organization has access to it). For information about configuring Sonosite Synchronicity Workflow Manager to work with LDAP, see Configuring the connection to the LDAP directory [28].

The instructions for creating and editing user profiles are for those organizations that cannot connect with LDAP and need to manually create user profiles.

NOTE
Users must have a department and role assigned to them, or they won't have access to anything when they log in. You have to assign at least one department and role to each user.

Viewing the user profile list

From the main menu ☰, select **Department Admin** or **System Admin**, and click **Profiles**.

Creating a new user profile

Only System Administrators can create new user profiles. Department Administrators can add existing users to their departments and update roles.

1. From the main menu ☰, select **System Admin**, and click **Profiles**.
2. Click **Add**.
3. In the **Email** field, type the user's email address. If there is already a profile for the user, Sonosite Synchronicity Workflow Manager automatically populates the remaining fields.
4. From the **Title** drop-down list box, select a title for the new user.
5. Optionally, from the **Prefix** drop-down list box, select a prefix for the new user.
6. In the **User name** field, type the login name for the user.
7. In the **First name** field, type the first name of the user.
8. In the **Last name** field, type the last name of the user.
9. In the **Mobile Number** field, type the user's 10-digit mobile number.
10. In the **Badge ID** field, type the user's badge ID.

11. In the **Is this user a System Admin** field, select one of the following:
    - **Yes**: go to Step 12.
    - **No**
    a. From the **Departments** drop-down list box, select a department.
    b. From the **Roles** drop-down list box, select one or more roles.
    c. To add another department, click **Add**, and repeat Steps a and b.
12. When done, click **FINISH**.
    Sonosite Synchronicity Workflow Managergenerates the user's system password after you submit the form.

Adding a user to a department

You can add both LDAP users and non-LDAP users to a department.

1. From the main menu ☰, select **Department Admin**, and click **Profiles**.
2. Click **Add**.
3. In the Email field, type the user's email address.
   There should already be a profile for the user. Sonosite Synchronicity Workflow Manager automatically populates most of the remaining fields, and they are read-only.
4. To add a department, click **Add**.
5. From the **Departments** drop-down list box, select a department.
6. From the **Roles** drop-down list box, select one or more roles.
7. To add another department, click **Add**, and repeat Steps 5 and 6.
8. When done, click **FINISH**.

Deactivating a user profile

NOTE
Only System Administrators can deactivate a user profile; this control is hidden from other users.

1. From the main menu ☰, select **Department Admin** or **System Admin**, and click **Profiles**.
2. From the user profile list, find the user profile you want to deactivate, and select the check box by their name.
3. Click **Deactivate**.

To reactivate the user profile, follow steps 1 and 2, and click **Activate**.

Managing user groups

When creating user groups, make sure that each user in the group has the same role that you are adding the group to; for example, if you are creating a "QA" user group, each user must have "QA" as their designated role.

Viewing the user group list

From the main menu ☰, select **Department Admin**, and click **Groups**.

Creating a new user group

1. From the main menu ☰, select **Department Admin**, and click **Groups**.
2. Click **Create**.
3. In the **User Group Name** field, type the name of the user group. For example, Attending, EMED, or QA Reviewers.
4. From the **Users** drop-down list box, select one or more users.
5. In the **User Group Description** field, type a description of the user group.
6. Click **CREATE**.

Editing or deleting a user group

1. From the **User Group** list, search for the user group you want to modify.
2. Click the user group.
3. Make the required changes, and click **UPDATE**.
4. To delete a user group, find the user group you want to delete in the **User Group** list, click the trash icon 🗑, then click **DELETE**.

Resetting studies to unassigned status

There can be situations where studies that have been assigned to one user need to be freed for another person to use. To accommodate this requirement, administrators can use the Reset feature to reset multiple studies at once to unassigned status,

1. From the Sonosite Synchronicity Workflow Manager dashboard, click **All assigned**.
2. (Optional) Select any filters of interest.
3. Select the check box of each study that you want to unassign.

> **NOTE**
> Administrators can reset any study status, except those which are set to *QA archived*, *Deleted*, or *Performing unassigned* status..

4. Click **Actions** at the top of the page.
5. Under **Studies**, click **Reset**.
   The selected items are reset to *Performing unassigned*. They can now be reassigned.

Building custom and QA worksheets

In Sonosite Synchronicity Workflow Manager, you can create custom worksheets in one of two ways: You can copy one of the default templates that are available in the Sonosite Synchronicity Workflow Manager application, or you can copy an existing worksheet.

> **NOTE**
> If you are updating a worksheet that is currently being used for a study, the worksheet is not updated until the next time the worksheet is selected by a user.

The FUJIFILM Sonosite Professional Services team will help you build worksheets for your department when they install the software.

In addition, Sonosite Synchronicity Workflow Manager provides a QA worksheet (one per department) that can be updated based on your department needs.

Building custom worksheets

Viewing the worksheet list

From the worksheet list, you can:

- View all the worksheets
- Create a worksheet from a template or an existing worksheet
- Publish and unpublish a worksheet
- Delete a worksheet

1. From the main menu ☰, select **Department Admin**.
2. From the Department Admin dashboard, select **Custom worksheets**.
3. To sort the list, click **Sort**, and select an option.

Creating a new worksheet from a template

If you don't have many worksheets or want to create one that's brand new, you may want to start with a template. Starting with a template is also helpful if you only have detailed worksheets that you would have to trim down anyway.

If you want to create a worksheet based on an existing worksheet, see Creating a new worksheet from an existing worksheet [8].

1. From the main menu ☰, select **Department Admin**.
2. From the Department Admin dashboard, select **Custom worksheets**.
3. Click **Create from template**.
4. From the list, select the worksheet that is similar to the one you want to create.
5. Click **Copy**.
6. In the **Worksheet name** field, type a new name for the worksheet.

7. Complete the rest of the worksheet. Click one of the following links to jump to that topic:
   - Working with sections [8]
   - Working with questions [10]
   - Adding and removing exams [14]
   - Adding and removing CPT codes [14]
8. To save your changes, click **FINISH**.
9. From the pop-up screen, click **Publish** to allow others to use the worksheet or **Unpublish** to keep the worksheet hidden.
10. Click **SUBMIT**.

Creating a new worksheet from an existing worksheet

If you want to make a new worksheet based on an existing one (for example, using a Cardiac worksheet to create one for eFast), you can choose to copy the Cardiac worksheet and just switch the sections around so the heart section is first instead of the abdomen. Moving sections around in a worksheet is simple and fast.

If you want to create a worksheet based on a template, see Creating a new worksheet from a template [7].

1. From the main menu ☰, select **Department Admin**.
2. From the Department Admin dashboard, select **Custom worksheet**.
3. From the list, select the worksheet that is similar to the one you want to create. A preview of the worksheet displays.
4. To create a new worksheet, click **Edit**.
5. In the **Worksheet name** field, type a new name for the worksheet.
6. Complete the rest of the worksheet. Click one of the links below to jump to that topic:
   - Working with sections [8]
   - Working with questions [10]
   - Adding and removing exams [14]
   - Adding and removing CPT codes [14]
7. To save your changes, click **FINISH**.
8. From the pop-up screen, click **Publish** to allow others to use the worksheet or **Unpublish** to keep the worksheet hidden.
9. Click **SUBMIT**.

Working with sections

> **NOTE**
> If you are updating a worksheet that is already being used for a study, it will not be updated until the next time the worksheet is selected.

Adding a new section to a worksheet

1. In the worksheet form, next to a section, click the copy icon .
2. From the **Copy it** drop-down list, select whether you want the new section to come before or after the section you select from the section drop-down list.

3. Click **Copy**.
4. In the **Section name** field of the copied section, type a new section name.
5. Revise the section as needed.

Editing or deleting a section of a worksheet

1. In the worksheet form, revise the fields in the section, as needed.
2. Click **Save**.
3. To delete a section, in the worksheet form next to the section you want to delete, click the trash can icon .

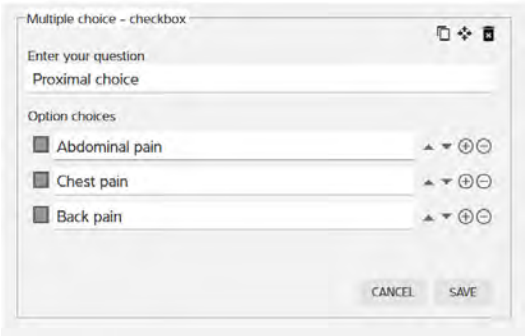
Moving a section in a worksheet

1. In the worksheet form, next to the section you want to move, click the move icon .
2. From the **Move it** drop-down list, select whether you want the new section to come before or after the section you select from the section drop-down list.
3. Click **Move**.

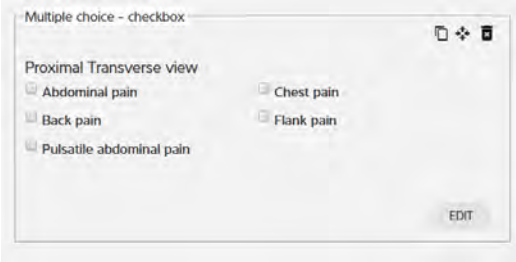
Working with questions

Adding questions and text to a worksheet

1. In the worksheet form, next to the section you want to add the question to, click **New Question** and select one of the following:
   - **Multiple choice - check box** Adds an area for you to create a question and then check box options for the question. Users can select more than one check box for this type of question.

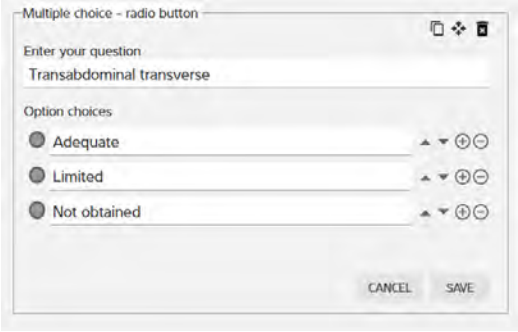


What the question options look like when you're editing



What the question options look like in the actual worksheet

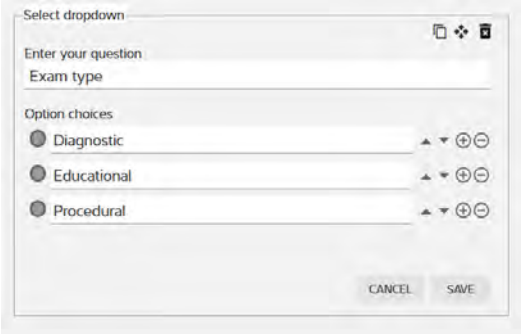
   - **Multiple choice - radio button** Adds an area for you to create a question and then radio button options for the question. Users can select only one radio button for this type of question.



What the question options look like when you're editing

What the question options look like in the actual worksheet

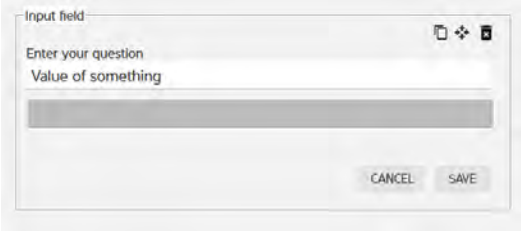
   - **Multiple choice - drop-down** Adds an area for you to create a question with drop-down choices. Users can select only one option for this type of question.



What the question options look like when you're editing

What the question options look like in the actual worksheet

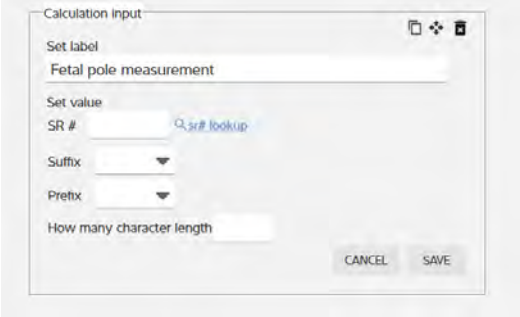
- **Input field** Adds an area for you to create a question and then provides a text field for users to answer the question.



What the question options look like when you're editing

What the question options look like in the actual worksheet

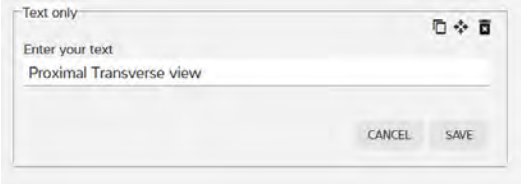
- **Calculation input** Adds an area for you to select a measurement option with a character limit.



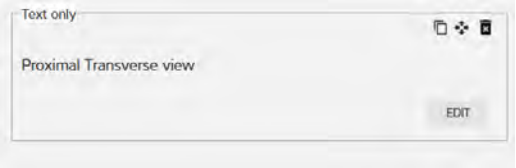
What the question options look like when you're editing

What the question options look like in the actual worksheet

- **Text only** Adds an area for you to type a statement.

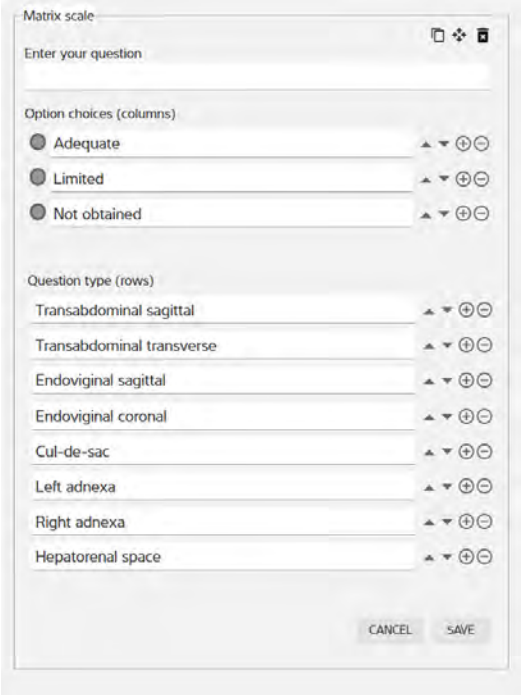


What the question options look like when you're editing

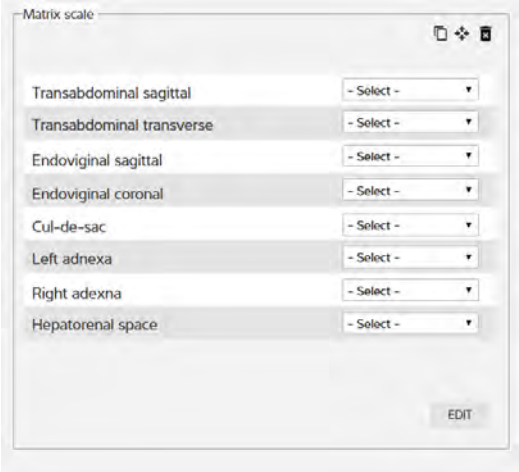


What the question options look like in the actual worksheet

- **Matrix scale** Adds an area for you to type a question, a list of options, and a secondary list of questions. When you save the matrix scale, the options are available in a drop-down list to all of the secondary questions.

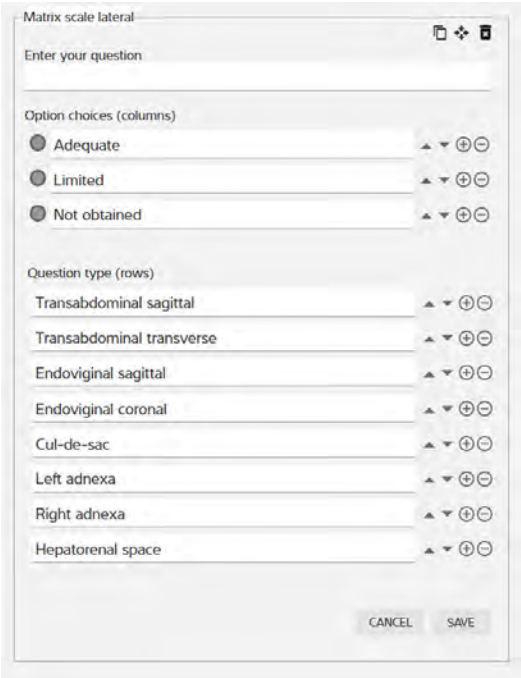


What the question options look like when you're editing

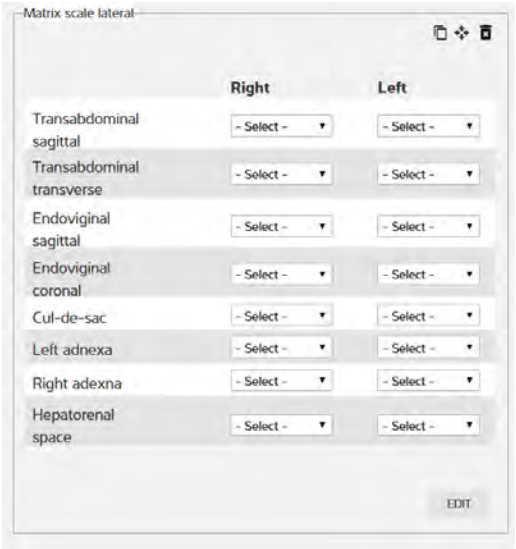


What the question options look like in the actual worksheet

- **Matrix scale lateral** Like the matrix scale, adds an area for you to type a question, a list of options, and a secondary list of questions. When you save the matrix scale lateral, however, the options are available in a drop-down list for all of the secondary questions but are separated into columns labeled Right and Left.

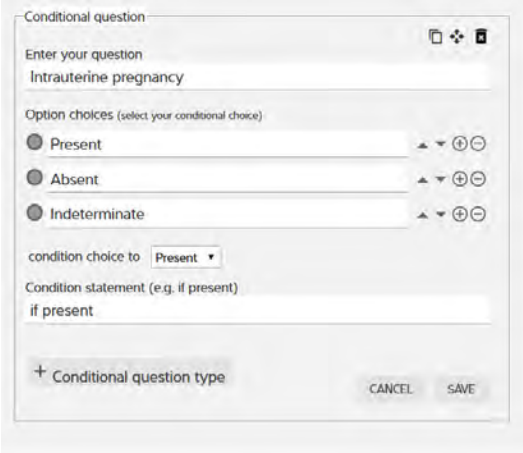


What the question options look like when you're editing

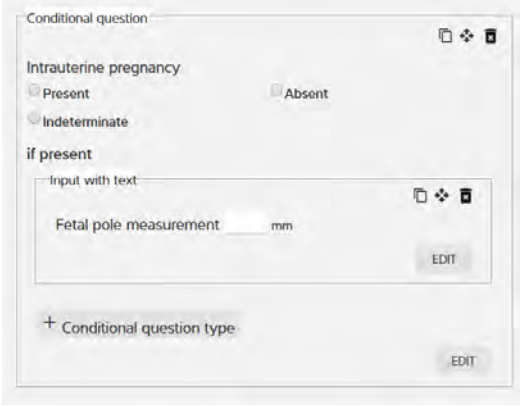


What the question options look like in the actual worksheet

- **Conditional question** Adds a section for a conditional question with primary options and also an optional conditional statement to one of your primary options.

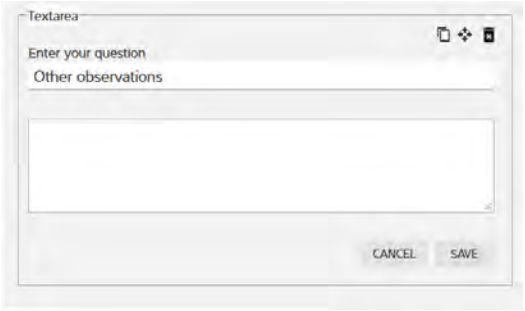


What the question options look like when you're editing



What the question options look like in the actual worksheet

- **Text area** Adds an area for you to create a question and then provides a field for you to prompt users about how answer the question.



What the question options look like when you're editing

What the question options look like in the actual worksheet

2. Within each new question, in the **Enter your question** field, type the new question.
3. In the **Option choices** field(s), type the options. For each option, you can click the:
   - Up and down arrows ▲▼ to move the options within the list
   - Add icon ⊕ to add another option
   - Remove icon ⊖ to remove an option
4. After completing the question and options, click **SAVE**.

Editing or deleting a question

1. In the question area, click **EDIT**, and make your changes.
2. When finished, click **SAVE**.
3. To delete a question, in the worksheet form next to the question you want to delete, click the trash can icon 🗑.

Copying a question

1. In the worksheet form next to a question, click the copy icon ⧉.

2. From the **Copy it** drop-down list, select whether you want the new question to come before or after the question you select from the **question** drop-down list.
3. In the **Section name** field of the copied question, type a new question.
4. Revise the question options as needed.

Moving a question to another part of the worksheet

1. In the worksheet form next to the question you want to move, click the move icon .
2. From the **Move it** drop-down list, select whether you want the new question to come before or after the question you select from the section drop-down list.

Adding and removing exams

You must add at least one predefined exams to a worksheet while creating or editing a new worksheet; however, you can only add those exams that have already been created in Sonosite Synchronicity Workflow Manager. When creating or editing an exam type, you can also associate the exam with existing worksheets. For more information about creating exam types and associating them with worksheets, see Managing exam types [19].

While creating a worksheet, you can also remove the exam types you don't want associated with a worksheet. This comes in handy when you're copying a worksheet from an existing template or worksheet and don't need that particular exam type. When you remove an exam type from a worksheet, it only removes the association to that worksheet; it does not remove the exam type altogether.

1. In the worksheet, under **Exam type**, click an empty part of the box.
2. Select an exam type from the drop-down list. The exam type appears in the box.
3. To remove an exam, in the worksheet, under **Exam type**, click the **x** in the exam type you would like to remove.
   The exam type is removed from the box.

Adding and removing CPT codes

You can add predefined CPT codes to a worksheet while creating or editing a new worksheet; however, you can only add those CPT codes that have already been created in Sonosite Synchronicity Workflow Manager. When creating or editing a CPT code, you can also associate it with existing worksheets. For more information about creating CPT codes and associating them with worksheets, see Managing CPT codes [17].

While creating a worksheet, you can also remove those CPT codes you don't want associated with a worksheet. This comes in handy when you're copying a worksheet from an existing template or worksheet and don't need that particular CPT code. When you remove a CPT code from a worksheet, it only removes the association to that worksheet; it does not remove the CPT code altogether.

1. In the worksheet, under **CPT code(s)**, click an empty part of the box.
2. Select a CPT code from the drop-down list. The CPT code appears in the box.

> **NOTE**
> All modifiers associated with the CPT code are added.

3. To remove a CPT code, in the worksheet under **CPT code**, click the **x** in the CPT code you would like to remove.
   The CPT code is removed from the box.

Unpublishing, enabling, and deleting worksheets

If you need to make changes to an existing worksheet and don't want it to display in the worksheet list, you can unpublish it temporarily.

You can also delete a worksheet. If you try to delete or unpublish a worksheet that is currently being used, it will be available until the study ends. If, however, you try to delete or unpublish a worksheet that is part of a credentialing program that is not yet completed, you will not be able to do so.

- To unpublish a worksheet, from the worksheet list, click to check the box of the worksheet you'd like to hide from users, and click **Unpublish**. The worksheet turns gray in the list and will not be seen by users.
- To enable a worksheet, from the worksheet list, click the worksheet you'd like to enable; it changes from gray to active.
- To delete a worksheet, from the worksheet list, click to check the box of the worksheet you'd like to delete, and click **Delete**. The worksheet is removed from the list.

Building QA worksheets

Sonosite Synchronicity Workflow Manager allows one QA worksheet per department, and the first one (before you make custom updates) is the default ACEP. No matter how many changes you make to the QA worksheet, you can always return to the default ACEP.

Previewing the QA worksheet

1. From the main menu ☰, select **Department Admin**.
2. From the Department Admin dashboard, click **QA worksheet**.

You can also choose a version of the QA worksheet to preview:

- If there haven't been any changes to the QA worksheet, the factory default (ACEP) version displays.
- If there has been an update to the factory default version, from the **View versions** drop-down list, select the version you want to preview based on the date and time stamp.

Updating the QA worksheet

1. From the QA worksheet preview page, click **Edit**.
2. Select the **Custom radio button**, and add, edit, move, and delete questions.

Adding a question

1. Click **New Question** and, from the drop-down list, choose the type of question or text you want to add.
2. Within each new question, in the **Enter your question** field, type the new question.
3. In the **Option choices** field(s), type the options. For each option, you can click the:
   - Up and down arrows ▲▼ to move the options within the list
   - Add icon ⊕ to add another option
   - Remove icon ⊖ to remove an option
4. After completing the question and options, you can add another question or click **SAVE**.

Editing or deleting a question

1. In the question area, click **EDIT**, and make your changes.

2. When finished, click **SAVE**.
3. To delete a question, in the worksheet form next to the question you want to delete, click the trash can icon .

Copying a question

1. In the worksheet form next to a question, click the copy icon .
2. From the **Copy it** drop-down list, select whether you want the new question to come before or after the question you select from the **question** drop-down list.
3. In the **Section name** field of the copied question, type a new question.
4. Revise the question options as needed.

Moving a question to another part of the worksheet

1. In the worksheet form next to the question you want to move, click the move icon .
2. From the **Move it** drop-down list, select whether you want the new question to come before or after the question you select from the **section** drop-down list.

Resetting the QA worksheet back to the ACEP version

1. From the QA worksheet preview page, click **Edit**.
2. Select the **ACEP** radio button.
3. Click **FINISH**.
   The current version is now ACEP.

Managing CPT codes

The American Medical Association (AMA) has a standardized list of Current Procedural Terminology (CPT) codes and modifiers that the Sonosite Synchronicity Workflow Manager uses for billing medical diagnostic services and procedures.

Sonosite Synchronicity Workflow Manager allows for the addition of modifiers to CPT codes to show that a procedure code has been altered. One or more modifiers can be added to the CPT code configuration.

Viewing the CPT code list

1. From the main menu ☰, select **Department Admin**, and click **CPT codes**.
2. To sort the list, click **Sort**, and select an option.

Creating a new CPT code

1. From the main menu ☰, select **Department Admin**, and click **CPT codes**.
2. Click **New**.
3. In the **CPT code number** field, type the CPT code number.
4. In the **Short description** field, type a short description of the CPT code.
5. In the **Full description** field, type a detailed description of the CPT code.
6. In the **Associated worksheet** drop-down list box, select one or more worksheets.
7. Click **Add Modifiers** (if required for the associated CPT code).
8. In the **Modifier number** field, type the modifier number.
9. In the **Description** field, type a detailed description of the CPT code modifier.

> **NOTE**
> There is no limit to the number of modifiers you can add to a CPT code.

10. Click **FINISH**.

Editing a CPT code

1. From the main menu ☰, select **Department Admin**, and click **CPT codes**.
2. From the CPT code list, click the CPT code you want to edit.
3. Make the required changes, and click **UPDATE**.
4. When prompted, click **UPDATE**.

Deleting a CPT code

1. From the main menu ☰, select **Department Admin**, and click **CPT codes**.
2. Find the CPT code you want to delete, and click the trash can icon 🗑.
3. At the prompt, click **DELETE**.

Canceling a CPT code

When creating a CPT code, you can cancel it at any time.

1. When you are creating a CPT code, to cancel it, click the cancel icon .
2. At the prompt, click **DISCARD CHANGES**.

Managing exam types

Sonosite Synchronicity Workflow Manager allows for multiple exam types. Different modalities and tags cans be added to a single exam type.

Viewing the exam type list

1. From the main menu ☰, select **Department Admin**, and click **Exam Types**.
2. To reorder the list of exam types alphabetically (either a to z or z to a), click one of the heading titles (such as **Exam type names** or **Exam type description**).

Creating a new exam type

1. From the main menu ☰, select **Department Admin**, and click **Exam Types**.
2. Click **New**.
3. In the **Exam Type Name** field, type the name of the exam type.
4. In the **Exam Type Description** field, type a description of the exam type.
5. In the **Exam name from modality** field, type the modality and click the add icon ⊕.
   One or more modalities may be added.
6. In the **Tags for exam type** field, type the tag and click the add icon ⊕.
   One or more tags may be added.
7. Click **SAVE**.

Modifying an exam type

1. From the main menu ☰, select **Department Admin**, and click **Exam Types**.
2. Under the **Action** column of the exam type, click the drop-down arrow, and select **View/Modify**.

> **NOTE**
> - All fields can be modified except for **Exam Type Name**.
> - Any changes you make will not impact studies that are in progress; the changes only pertain to new studies.

3. Make the required changes, and click **MODIFY**.

Disabling custom exam types

Although Sonosite Synchronicity Workflow Manager provides a set of default exam types that cannot be disabled or deleted, administrators can disable or delete any custom exam type.

1. From the main menu ☰, select **Department Admin**, and click **Exam Types**.
2. Under the **Action** column, click the drop-down arrow and select **Disable**.
3. When prompted, click **YES**.

Deleting custom exam types

1. From the **Exam Type** list, search for the exam type you want to delete.

2. Under **Action** column, click the drop-down arrow, and select **Delete**.
3. When prompted, click **YES**.

Managing a credentialing program

Sonosite Synchronicity Workflow Manager offers your organization a way to create credentialing programs for students: Either new residents or clinicians needing to be re-credentialed can be part of the program.

Think of a credentialing program as a course with a start and finish date. The curriculum is made up of the required worksheets.

A credentialing program is administered by:

- The Department Administrator who creates and maintains the program
- Attending clinicians who sign off on the studies (and determine if the study is sent to EMR),
- QA reviewers who evaluate and assign credits to each study.

The Department Administrator role

For Department Administrators, Sonosite Synchronicity Workflow Manager lets you:

- Create and manage credentialing programs within your organization
- View programs at either a high-level or detailed view
- Track student credits
- Look at a program to see how quickly students are going through it; for example, who's finished, who's on time, and who's late
- Use reports to review how students are progressing through the different programs

For students, Sonosite Synchronicity Workflow Manager lets them see their scores in a program and how many worksheets they have left to complete. For more information, refer to the*Sonosite Synchronicity Workflow Manager Clinical User Guide.*

Credentialing program process (as an Administrator)

Administrators work through the following steps to manage credentialing programs:

1. Create a credentialing programs, adding appropriate start/end dates, worksheets, clinicians (students), QA reviewers, and attending clinicians.
2. Publish the newly created program, so it automatically begins on the indicated start date. Students can now perform the assigned study and decide whether or not to submit to EMR; Attending signs and approves or declines submissions to EMR; QA reviews and gives credit/no credit.
3. For a consolidated view, administrators can track the list of department programs and sort the list according to criteria.

> **NOTE**
> The default view of the program list shows those programs that are not started, in progress, and unpublished. You can also check the **Completed** check box to show completed programs.

4. The program concludes on the indicated end date.

Creating a new program

Before creating a new credentialing program, it's a good idea to first create the user groups for your department; that way, you can add the appropriate group of users (such as second-year students or QA reviewers) instead of adding each user to the program individually.

> **NOTE**
> Every user in the user group must have the same role assigned to them as the user group being added to the program.

When creating and editing program, you can save the program by clicking the save icon . If you haven't completed the required fields, you are prompted to do so.

You can also click the cancel icon to discard your changes and exit the program page.

1. From the main menu, select **Department Admin**, and click **Credentialing**.
2. Click **New**.
3. Under **Program Details**, in the **Name** field, type a name for the program.
4. From the **Start date** drop-down calendar, select the program start date.
5. From the **End date** drop-down calendar, select the program end date.

> **NOTE**
> The **End date** field can be left blank for open-ended programs.

6. Under **Worksheets**, in the **Select worksheet** drop-down list box, select the worksheet type; click **Add** to select more worksheet types.
7. In the **Credit** field, type the required number of worksheets for each worksheet type.
8. Under **Roles**, in the **Students** drop-down list box, click to select one or more students and/or user groups.
9. In the **Attending** drop-down list box, click to select one or more attending clinicians and/or user groups.

> **NOTE**
> The Attending role is optional in a program.

10. In the **QA/Reviewer** drop-down list box, click to select one or more quality assurance reviewers and/or user groups.
11. Click **FINISH**.
12. Do one of the following:
    - If you are finished and ready to add the program to the program list, select **Publish**, and then click **SUBMIT**.
    - If you are not done making changes to the program (and are not yet ready to publish the program to the program list), select **Unpublish**, and then click **SUBMIT**.
      Unpublish saves the program to the list, but it will only be viewable to you, as the Administrator. You can go back later and publish the program when you're ready for users to view it.

Editing a program

You can only edit programs that are not complete.

1. From the main menu ☰, select **Department Admin**, and click **Credentialing**.
2. Click the name of the program you want to edit.
3. Make the required changes, and click **FINISH**.
4. Do one of the following:
   - If you are finished and ready to add the program to the program list, select **Publish**, and then click **SUBMIT**.
   - If you are not done making changes to the program (and are not yet ready to publish the program to the program list), select **Unpublish**, and then click **SUBMIT**.
     Unpublish saves the program to the list, but it will only be viewable to you, as the Administrator. You can go back later and publish the program when you're ready for users to view it.

Previewing a program

1. From the main menu ☰, select **Department Admin**, and click **Credentialing**.
2. From the program list, click the name of the program you want to preview.

Disabling and enabling programs

- To disable a program, from the program study list, select the program, and click **Disable**.
- To enable a previously disabled program, from the program study list, select the program, and click the disable icon 👁‍🗨 next to the program name.
  You can enable programs:
  - Before the start date
  - After the start date, but before end date
  - That are still in draft form

Deleting a program

1. From the main menu ☰, select **Department Admin**, and click **Credentialing**.
2. Select the check box of the program you want to delete.
3. Click **Delete**.

Reporting

The reporting feature in the Sonosite Synchronicity Workflow Manager lets you view various kinds of reports:

- *Administrative reports* give an overview of departmental operational trends, such as the number of studies performed, percentages of those studies submitted to EMR, and the number of studies that are taking too long to work their way through the Sonosite Synchronicity Workflow Manager.
- *Standard reports* provide a collection of predefined data analytics report templates to perform physician benchmarking reports and department benchmarking reports. These reports include individual key metrics, study completion status, study counts, and more.
- *Educational reports* provide a summary of student activity for a credentialing program. This type of report includes the number of worksheets completed, program due date, percent of credits completed, image quality of studies, accuracy of interpretation, and gold standard percentage.

Viewing administrative reports

1. To view a list of administrative reports, from the main menu ☰, select **Report**.
2. In the upper right corner of the screen, click **View administrative reports**.
3. Select the type of report you want to view from the **Report by** drop-down list box:
   - **Date range** adjusts the report timeframe either by using the slider to set between 1 and 12 months, or by entering a custom calendar date range.
   - **Worksheets** plots the number of each type of worksheet.
   - **Provider** plots the number of worksheets entered by each user.
   - **Exam types** plots the number of worksheets that use each exam type.
   - **Study type** allows you to filter for clinical or educational reports.
   - **User options** lets you choose whether to include deactivated users in your report.

Applying activity indicators to an administrative report

1. Select **Submitted to EMR** to overlay the number of worksheets that have been submitted to EMR for billing.
2. Select **>48hrs** to overlay the number of studies that are taking too long to work their way through the Sonosite Synchronicity Workflow Manager.

> **NOTE**
> If you have changed the ageout threshold setting from its default 48-hour value, the checkbox label will reflect that change. For more information about configuring administrative report settings, see Configuring administrative report settings [31].

3. Select **QA Archived** to overlay the number of worksheets that have been approved by QA.

Filtering an administrative report

You can apply a number of filters to customize your administrative reports. The following filter options are available in the **Refine by** pane on the left side of the **Administrative reports** screen.

1. Use **Date range** to specify the timeframe for your report. You have two ways of selecting your date range:
   - Select any start and ending dates by either:
     - Typing the desired start and end dates for your report into the date range field using the format *YYYY-MM-DD*.
     - Clicking in the date range field, then select your report's start date in the calendar on the left, the end date from the calendar on the right, then click **Apply**.
   - Select a period of time by clicking **Slider**, then moving the slider button along the timeline to adjust the amount of historical data you want to include. For example, move the slider to **12 months** if you want to see data from 12 months ago up to today. In this mode, you can click **Custom** to switch back to using the calendar view.
2. Use **Worksheets** to specify which worksheets you want included in your report by clicking in the **Worksheets** field and selecting each worksheet you want to include.
3. Use **Provider** to specify which people you want included in your report by clicking in the **Provider** field and selecting each person you want to include.
4. Use **Exam types** to specify which exam types you want included in your report by clicking in the **Exam types** field and selecting each exam type you want to include.
5. Use **Study type** to specify whether clinical studies or educational studies should be included in your report by selecting **Clinical** or **Educational**.
6. Select **User options** to include deactivated users in the report.
   Your report will provide updated information about any filter settings below the graph, indicating what date range, providers, study types, worksheets, and exam types are included in the report.
7. If you want to save your filter settings for future use:
   a. Click **SAVE**, enter a unique filter name in the **Save filter** dialog.
   b. Click **ADD** to save it.
   Your new saved filter will appear in the **Refine by** drop-down list.

> **NOTE**
> - You must use a unique name for your saved filter; entering the name of an existing filter will result in an error.
> - If you want to rename a filter, first delete the old filter, then create and save a new version of the filter.

Viewing standard reports

1. To view a list of standard reports, from the main menu, select **Report**.
2. In the upper left corner of the screen, click **standard reports**.
3. Select the type of report you want to view from the **Report type** drop-down list box.

Filtering a standard report

You can apply a filters to customize your standard reports. The following filter options are available in the **Refine by** pane on the left side of the **Standard reports** screen.

1. Use **Date range** to specify the timeframe for your report. You have two ways of selecting your date range:
   - Select any start and ending dates by either:
     - Typing the desired start and end dates for your report into the date range field using the format *YYYY-MM-DD*.
     - Clicking in the date range field , then selecting your report's start date in the calendar on the left, the end date from the calendar on the right, then clicking **Apply**.
   - Select a period of time by clicking **Slider**, then moving the slider button along the timeline to adjust the amount of historical data you want to include. For example, move the slider to **12 months** if you want to see data from 12 months ago up to today. Alternatively, you can click **Custom** to switch back to using the calendar view.
2. Use **Report type** to specify which query report title you want to generate a report.
3. Use **User options** if you want to include deactivated users in the query results report.

Viewing educational reports

1. To view a list of educational reports, from the main menu ☰, select **Report**.
2. To view the details of a specific program, click the desired program's **VIEW DETAILS** button. From here, you can see the:
   - Program due date
   - Number, type, quality, and percentage of worksheets completed
   - Student progress for each type of worksheet

Sending and exporting reports

You can choose to have report summaries either sent to your email or exported to a CSV (Comma Separated Values) file.

Emailing reports

1. From the report page, click the more icon ••• at the right side of the desired report.
2. Click **Email report**.
   A copy of the report will be sent to your email address.

> **NOTE**
> Sending an email report does not affect any scheduled email notification you configure for educational reports.

Scheduling automatic email notifications for educational reports

Educational reports offer an additional email feature: you can schedule the Sonosite Synchronicity Workflow Manager to automatically send email notifications on a periodic basis.

1. From the **Educational Reports** page, click the desired program's **Email notifications** button. It turns green and shows **Yes**.
2. When prompted, select a notification frequency:
   - **Weekly once Monday 8am** starts on the next Monday at 8:00 AM.
   - **Every two weeks Monday 8am** starts on the first and third Mondays at 8:00 AM.
   - **Monthly once Monday 8am** starts on the first Monday of every month at 8:00 AM.
3. Click **Done**.

4. To turn off automatic email notifications, from the report page, click the **Email notifications** button to the left.
   The green color disappears and shows **No**.

You can also change the frequency of existing email notifications by clicking the **edit** button under the desired program's **Email notifications** button in the report page, click, then selecting the notification frequency you prefer.

Exporting reports to CSV

1. From the report page, click the more icon ••• at the right side of the desired report.
2. Click **Export to csv**.

Configuring IT settings

Configuring login security

Users must log in with the system-generated password within 72 hours of it being generated to change their password, or they will be redirected to request a new system-generated password.

1. From the dashboard, select **System Admin** from the main menu ☰, and click **Password Configuration**.
2. Under **Password Complexity**, select a minimum of three password complexity requirements.
3. In the **Password Minimum Length** field, type the minimum password length requirement.
4. In the **User defined password expires in (days)** field, type the number of days before a password expires.
5. In the **History of password reuse restriction count** field, type the number of times users are allowed to reuse a password.
6. In the **Account Lock-Out threshold (unsuccessful attempts)** field, type the number of times users are allowed to attempt entering a password unsuccessfully before they are locked out of the system.
7. Click **Save**.
8. To reset the login security configuration, click one of the following:
   - **Reset** to change back to the previously saved settings.
   - **Reset To Default** to change back to the default settings.

Configuring the SMTP server

1. From the dashboard, select **System Admin** from the main menu , and click **SMTP Configuration**.
2. In the **SMTP Server** field, type the server address.
3. In the **SMTP Port** field, type the port number.
4. In the **From Address** field, type the address (for example, *DoNotReply@TBD.com*).
5. From the **Enable Authentication** drop-down list box, select **Yes** or **No**.
6. From the **Enable SSL** radio buttons, select **Yes** or **No**.
7. In the **Authenticate Username** field, type the authenticated SMTP username.
8. Click **Save**.
9. To revert to the previously saved data, click **Reset**.

Configuring the connection to the LDAP directory

LDAP accounts are maintained by the System Administrator. If the System Administrator deletes or deactivates an account, then the user will no longer have access to the Sonosite Synchronicity Workflow Manager.

1. From the dashboard, select **System Admin** from the main menu ☰, and click **LDAP Configuration**.
2. In the **Type** drop-down list box, select the directory type.
3. In the **Remote Server** field, type the address of the remote server.
4. In the **Access Groups** field, type the groups that should have access.
5. In the **Search Root** field, type the path to the system root directory.
6. In the **LDAP Port** field, type the port number of the LDAP directory.
7. To use Secure Sockets Layer (SSL)/Transport Layer Security (TLS) technology to encrypt your LDAP traffic that is transmitted between the Sonosite Synchronicity Workflow Manager and your LDAP directory, select the **Secured** checkbox.

8. In the **User DN** field, type the Distinguished Name of the user directory that you wish to search.
9. In the **Manager DN** field, type the Distinguished Name of the manager directory that you wish to search.
10. In the **Manager Password** field, type the manager's password.
11. In the **IT Admin User Name** field, type the name of the System Administrator.
12. Click **Test Connection**.

> **NOTE**
> You will receive a message if the connection succeeds or fails. If the connection fails, it may be because the active directory is down, data entered is incorrect or there is a network issue.

13. When prompted, click **Ok**.
14. If the connection fails, check to make sure all the fields are correct, or try again later to see if the server was down and couldn't connect.
15. If the connection succeeds, when prompted, click **Ok**.
16. Click **SAVE & SYNCHRONIZE**.

Configuring Multi-Factor Authentication

1. From the dashboard, select **System Admin** from the main menu ☰, and click **Multi-Factor Authentication**.
2. In the **Type** field, select **Email** to have the system email the MFA code to the user.
3. Select **Expire Time (Minutes)** and then enter the number of minutes users will have to enter the authentication code that is emailed to them before the code expires.
4. Click **Save** to save changes.
5. If you want to cancel your changes, click **Cancel**.
6. If you want to disable multi-factor authentication, in the **Type** field, select **None** and then click **Save**.

Configuring EMR submissions

You can send study reports by either HL7 or EDMS mode:

- In HL7 mode, you have the option of embedding a PDF with the study reports. The Sonosite Synchronicity Workflow Manager sends the department study reports in HL7 message format through the selected channel.
- In EDMS mode, the Sonosite Synchronicity Workflow Manager submits the department study reports in PDF format only.

1. From the dashboard, select **System Admin** from the main menu ☰, and click **EMR Configuration**.

2. From the **Message Mode** drop-down list box, select one of the following:
   - **HL7**
     a. Select the **Embedded PDF** check box if you would like to send an embedded PDF with the HL7 message. If not, leave the box unchecked.
     b. From the **Channel** drop-down list box, select a channel.
     c. In the **Receiving Facility** field, type the name of the receiving facility.
     d. In the **Host Name** field, type the name of the server IP address or host name.
     e. In the **Port** field, type the port number.
     f. In the **User Name** field, type the name of the facility's IT Administrator.
     g. In the **Password** field, type the password of the facility's IT Administrator.
     h. In the **Share Path** field, type the path for outbound mail.
     i. In the **Receiving Facility** field, type the name of the receiving facility.
     j. In the **Host Name** field, type the name of the server connected to the network.
     k. In the **Receiving Application** field, type the name of the receiving application.
     l. From the **Date Format** list box, select the date format for EMR submissions.
     m. Click **SAVE**.
   - **EDMS**
     a. From the **Channel** drop-down list box, select a channel.

> **NOTE**
> If you select **NETWORKSHARE** as the channel, there are a smaller subset of the fields mentioned below to complete.

     b. In the **Host Name** field, type the name of the server IP address or host name.
     c. In the **Port** field, type the port number.
     d. In the **User Name** field, type the name of the facility's IT Administrator.
     e. In the **Password** field, type the password of the facility's IT Administrator.
     f. In the **Share Path** field, type the path for outbound mail.
     g. From the **Date Format** list box, select the date format for EMR submissions.
     h. Click **SAVE**.
3. To revert to the previously saved data, click **Reset**.

Configuring DICOM server connections

1. From the dashboard, select **System Admin** from the main menu ☰, and click **DICOM Server Configuration**.
2. For each configuration, set the following fields:
   - **Configuration name** is a unique network name for the configuration.
   - **Entity** refers to the application entity (typically, a client) that uses the DICOM network service.
   - **Called AE Title** refers to the DICOM Application Entity Title that was called.
   - **IP Address** is the unique identifier to send data to the network.
   - **Port** is the device port number. IP port 104 is typically assigned for DICOM.
   - **Calling AE Title** refers to the DICOM Application Entity Title that is calling.
3. Click **SAVE**.

Configuring system settings

Configuring the DICOM auto-archive frequency

1. From the dashboard, select **System Admin** from the main menu ☰, and click **Settings**.
2. From the **Dicom Auto-Archive Frequency** drop-down list, select the length of time between automatic archives.
3. Click **SAVE**.

Configuring system user notifications

1. From the dashboard, select **System Admin** from the main menu ☰, and click **Settings**.
2. Next to **System User Notification**, click **Enable**.
3. In the text field, enter the message you want to appear whenever a user signs in to the system.
4. Click **SAVE**.

Configuring administrative report settings

Department administrators can customize the following settings for their department's unique requirements.

Configuring the study ageout threshold

Department administrators can have the Sonosite Synchronicity Workflow Manager automatically flag studies that are taking too long to work their way through the system. Each department can specify how much time they want to allow before the system flags a study as aging.

1. From the dashboard, select **Department Admin** from the main menu ☰, and click **Settings**.
2. In the **Study ageout threshold (In hours)** field. enter the amount of time for a study to be flagged as aging.

> **NOTE**
> The default ageout threshold is 48 hours; changing this value will be reflected in the **Administrative reports** screen's **>XXhrs** checkbox (where *XX* is the new value you have entered). For more information about using this activity overlay in an administrative report, see Viewing administrative reports [24].

3. Click **SAVE**.
4. Log out of the system.
   The change to the ageout threshold value will be applied.

> **NOTE**
> You must sign out of the Sonosite Synchronicity Workflow Manager in order for the system to apply the change to the ageout threshold value. Navigating away from this control without logging out will cancel any update.

Configuring accession number settings

1. From the dashboard, select **Department Admin** from the main menu ☰, and click **Settings**.

2. Use **Order preference** to specify whether studies in your department require an accession number when they are submitted to the EMR:
   - Select **Yes** if your department uses an order-based workflow.
   - Select **No** if your department uses an encounter-based workflow.
3. Click **SAVE**.

IT Network

Data backup

- Perform data backups regularly as part of your organization's disaster recovery plan. Doing so will help ensure proper system operation and data integrity. FUJIFILM Sonosite recommends that you allow only the authorized system administrator to back up and restore ePHI, audit log, and system configurable data.
- Keep data backups on modern types of media to ensure data is not lost due to technology obsolescence.

Security and privacy

- The security and privacy-related configurable controls in the Sonosite Synchronicity Workflow Manager are:
  - User roles and responsibilities
  - Automatic user log off
  - User authorization and authentication
  - Data backup and recovery
  - Data encryption (at rest and in transit)

- System and Department Administrators should follow the suggested technical and physical safeguards listed below, as well as the detailed HIPAA guidelines to ensure HIPAA compliance:
  - **Room Access Control:** Local procedures must be put in place to limit physical access to medical equipment, to prevent accidental, casual, or deliberate contact by unauthorized individuals.
  - **System Access Controls:** Recommended system access controls are listed below:
    - Create unique clinical user accounts for each operator.
    - To remotely access the system, go through your organization's defined access control point.
  - **MFA:** Enable Multi-factor authentication (MFA) as an additional method of securely verifying user identities.
  - **Audit Controls:** Review audit logs by your organization's chosen log-viewing application. FUJIFILM Sonosite recommends that the audit log viewing application does the following:
    - Limits read-only access to only the system administrator
    - Maintains audit log events for a minimum of 30 days
    - Allows for the setup of configurable external alerts of system violations
    - Allows external alerts to be stored locally or sent to a system-monitoring application
    - Allows audit logs to be searched for keywords and sorted by date and time
    - Protects audit logs to ensure integrity of logs
  - **Removable media handling:** Removable media that contains images or other medical information must be stored in a secure area that is not accessible by unauthorized individuals.
  - **Transmission Security:** Transmitted data should be encrypted with the use of certificates, when possible, to ensure the confidentiality and integrity of clinical data.
  - **Data Integrity:** Cryptographic methods should be used at all times to ensure the integrity of personal data. When possible, perform integrity checks to identify unauthorized changes in personal data:
    - **Data Encryption:** Data at rest should be encrypted 0at the disk level as well as the database level with a valid FIPS 140-2 compliant encryption method. Encryption keys should be kept secured and maintained only by system administrators.
    - **System Hardening:** The application and database hosting server(s) should be hardened according to the NIST 800-123 server security controls.

Glossary

For ultrasound terms not included in this glossary, refer to *Recommended Ultrasound Terminology, Third Edition*, published in 2011 by the American Institute of Ultrasound in Medicine (AIUM).

CPT code	CPT (Current Procedural Terminology) is a medical code set that is used to report medical, surgical, and diagnostic procedures and services to entities such as physicians, health insurance companies and accreditation organizations.
Credentialing	Credentialing is the process of establishing the qualifications of licensed medical professionals and assessing their background and legitimacy. Many health care institutions and provider networks conduct their own credentialing, generally through a credentialing specialist or electronic service, with review by a credentialing committee.
Department administrator	A department administrator is a person whose job involves helping to organize and supervise the way that departments within an organization or institution function.
DICOM	DICOM (Digital Imaging and Communications in Medicine) is a standard for handling, storing, printing, and transmitting information in medical imaging. It includes a file format definition and a network communications protocol.
EMR	An EMR (Electronic Medical Record) is a digital version of the traditional paper-based medical record for an individual. The EMR represents a medical record within a single facility, such as a clinic or a hospital.
ePHI	ePHI (Electronic Protected Health Information) refers to any protected health information that is covered under HIPAA (Health Insurance Portability and Accountability Act of 1996) security regulations and is produced, saved, transferred, or received in an electronic form.
FIPS 140-2	FIPS (Federal Information Processing Standard) Publication 140-2, is a U.S. government computer security standard used to approve cryptographic modules.
HIPAA	HIPAA (Health Insurance Portability and Accountability Act of 1996) is United States legislation that provides data privacy and security provisions for safeguarding medical information.
HL7	HL7 (Health Level-7) refers to a set of international standards for transfer of clinical and administrative data between software applications used by various healthcare providers.
LDAP directory	LDAP (Lightweight Directory Access Protocol) is a software protocol for enabling anyone to locate organizations, individuals, and other resources such as files and devices in a network, whether on the public Internet or on a corporate intranet.

MFA	Multi-factor authentication (MFA) is a method of securely verifying a user's identity. Users attempting to log into a software application often must complete a MFA process to certify their authorization to do so.
NIST	NIST (National Institute of Standards and Technology) is a unit of the U.S. Commerce Department. Formerly known as the National Bureau of Standards, NIST promotes and maintains measurement standards.
SMTP server	SMTP (Simple Mail Transfer Protocol) is a protocol for sending e-mail messages between servers.
System administrator	A system administrator is a person who is responsible for the upkeep, configuration, and reliable operation of computer systems, especially multi-user computers, such as servers.

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