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Sonosite Synchronicity
Workflow Manager

Clinical User Guide

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Patent: www.sonosite.com/patents

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Introduction

About this user guide

This user guide provides information on how to use the Sonosite Synchronicity Workflow Manager point-of-care ultrasound reporting system to manage your ultrasound system studies.

To use SonoSite Synchronicity Workflow Manager to manage your departmental processes, see the *Sonosite Synchronicity Workflow Manager Administrator User Guide.*

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:

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Getting Started

About Sonosite Synchronicity Workflow Manager

Sonosite Synchronicity Workflow Manager is a point-of-care ultrasound reporting system that streamlines clinical workflow, while delivering administrative efficiency with flexible credentialing tools. It provides a comprehensive solution to administrative challenges faced by point-of-care ultrasound clinicians and enables the standardization of clinical workflows, 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, and less time spent on labeling images and completing exams and reports. With a built-in simple DICOM viewer, the application can be used on a computer, tablet, or mobile device.
- **Focus on education** - Designed with ACEP guidelines in mind, you can use the SonoSite Synchronicity Workflow Manager to keep track of your completed exams to maintain your credentialing. Exams can be consistently reviewed using quality assurance forms that can be configured to meet your departmental requirements.
- **Worksheet-driven workflow** - The built-in exam worksheets can be configured by your administrator to meet your departmental processes, driving a standardized workflow for quality assurance, credentialing, and exam billing.

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.

Clinical workflow

Sonosite Synchronicity Workflow Manager is designed to be flexible, allowing you to streamline and manage any type of clinical ultrasound workflow. For example, your workflow may include a performing clinician, an attending (credentialed) clinician, and a quality assurance (QA) reviewer. Alternatively, you may have a simplified workflow that allows the performing clinician to combine all three roles.

Once you have linked your ultrasound system to the Sonosite Synchronicity Workflow Manager application, you can directly send it your ultrasound exams. In the Sonosite Synchronicity Workflow Manager software, exams are assigned to performing clinicians who are able to edit patient details, fill out exam worksheets, measure and label images and clips, merge or split data, and then sign and submit their studies. Next steps may include review and sign off by an attending clinician and QA reviewer. The reviewed and approved study can be submitted to the EMR.

Clinical workflow example

1. Ultrasound exam (study) is sent to the Sonosite Synchronicity Workflow Manager application.
2. Study is assigned to the performing, who fills it out and submits it to the next step (for example, to an attending).
3. Attending reviews then signs and submits the study.
4. QA reviews a subset of studies for quality control.
5. Using dashboards, clinicians can view study status and an activity summary.
6. Sonosite Synchronicity Workflow Manager sends images to your PACS.

Credentialing programs

Administrators set up credentialing and educational programs that allow ultrasound clinicians to obtain credit for reviewed and certified ultrasound studies. For further information on how to set up a credentialing program, see the *Sonosite Synchronicity Workflow Manager Administrator User Guide.*

Sonosite Synchronicity Workflow Manager makes it easy for you to keep track of your studies and the credits you have earned, or need to earn, for your credential. In a credentialing workflow, QA reviewers give credits to exams that meet the right criteria. You can also send key studies, images, and clips to a library to use as reference material in an educational program.

Credentialing workflow example

1. Your administrator creates credentialing programs and adds appropriate clinicians (students).
2. Study is assigned to the performing, who fills it out and submits it to the next step (for example, to an attending).
3. Attending reviews then signs and submits the study.

4. QA reviews and gives credit/no credit.
5. Using dashboards and reports, clinicians can view a summary of program activity.
6. The program concludes on the indicated end date.

Logging in and out

You can log into Sonosite Synchronicity Workflow Manager using your current network user ID and password.

If you do not have a network ID and password, contact your administrator to set up a Sonosite Synchronicity Workflow Manager account. Once your administrator has set you up as a user, Sonosite Synchronicity Workflow Manager sends you an email containing a link and a temporary password that expires after 72 hours. Use the temporary password to log in, and change your password following the rules in "Changing and requesting a password". If you try to log in using an expired system generated password, you are asked to request a new password.

1. In the Login page, type your username and password.
2. If you want the application to remember your login information, select **Remember me**.
3. Click or tap **LOGIN**.

4. To log out, click or tap your name or the profile icon 👤 and select **Logout** from the drop-down list box.

📓 **NOTE**

If the password you entered has expired or is temporary, you are redirected to the change password page. See Changing your password [4].

Password management

Your password must meet the following requirements:

• A minimum of eight characters
• Contains at least one character from the following categories:
  • Uppercase characters (A-Z)
  • Lowercase characters (a-z)
  • Numbers (0-9)
  • Non-alphabetic characters: `~!@#$%^&*-+=.,:;?<>
• Must not be any of your previous five passwords

Changing your password

1. Click or tap your name or the profile icon 👤 at the top of the page.
2. Select **Change password** from the drop-down list box.
3. Enter your current password and your new password.
4. To confirm the new password, type it in again, and then click or tap **CHANGE PASSWORD**.
   You are notified if your password change was successful or unsuccessful. Follow the instructions in the notification message.

Requesting a new password

1. If you have forgotten your password, click or tap **Forgot Password?** in the Login page.
2. On the Forgot Password page, enter your username.
3. Click or tap **RESET PASSWORD**.
   If you have entered a valid username, Sonosite Synchronicity Workflow Manager sends you an email notification containing a temporary password and a link to the login page.
4. Log in using your temporary password.
5. To change your password, see Changing your password [4].

Using dashboards

You can easily access your studies, workflow notifications, and other summary information using the Sonosite Synchronicity Workflow Manager dashboard. The dashboard is customized for you whether you are a performing clinician, an attending clinician, or a QA reviewer in your department or credentialing program. Dashboards use widgets to summarize study status and activity data; the dashboard also displays the number of studies in each category.

Using the dashboard, you can:

- Select any category to view a list of its studies
- Filter studies by time period
- View and navigate to studies you have worked on recently
- View reports if you are part of a credentialing program
- View summary information in your overview section

Dashboard features are displayed below:

Select a tab to access the customized dashboard. Some of the tabs may not be visible to you.	
If you are a performing (clinical) or attending clinician, use the widget links and tabs to navigate to filtered study lists.	
If you are a QA/Reviewer, use the widget links and tabs to navigate to clinical studies that need quality control or educational studies that need crediting.	

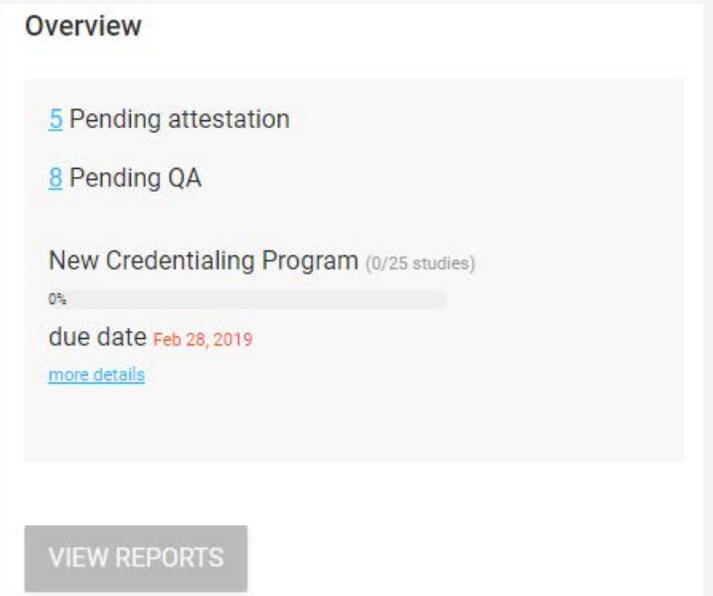You can adjust the date range of the studies displayed on the dashboard and use other filters.

Refine by

Date range · · ·

24 hours   12 months

12 months

Provider

Select one or more users

Quick Filters

All Studies
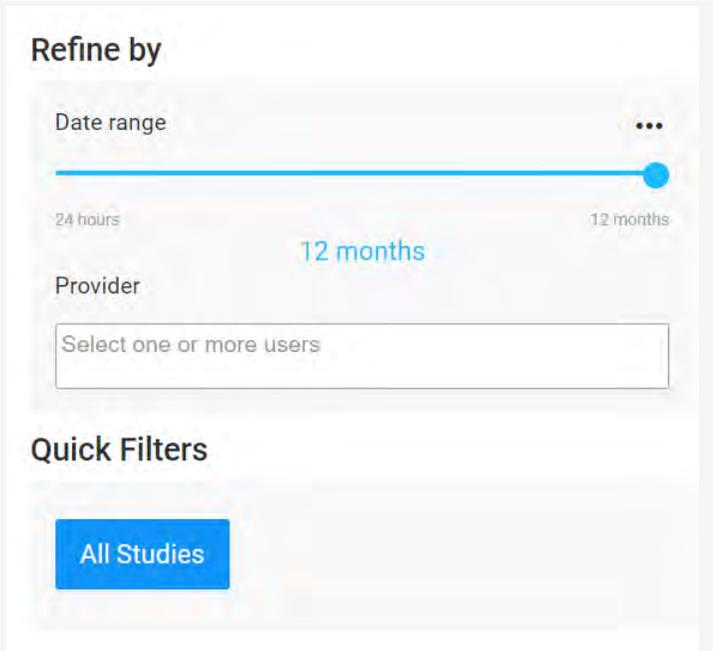
You can view and navigate to studies you have worked on recently.

Recent

Patient details	Study date & time
134383813, Maria Lewis, Sep-01-1987, Other	Jan-23-2019 4:20 PM

Study summary
3 img/1 clips

Patient details	Study date & time
39, Paul Jones, Jan-30-1987, Male	Jan-30-2019 5:13 PM

Study summary
3 img/1 clips
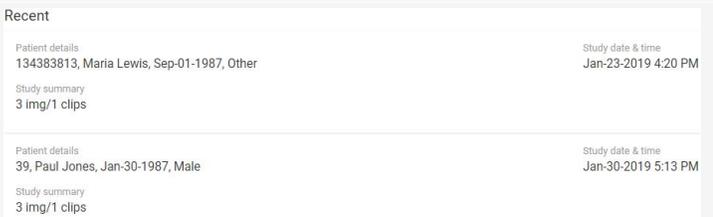
You can view a customized overview of your activity (study status, credentialing program completion, EMR submissions, and billed studies). This example shows the overview of a clinician participating in a credentialing program.

Overview

5 Pending attestation

8 Pending QA

New Credentialing Program (0/25 studies)

0%

due date Feb 28, 2019

more details

VIEW REPORTS

Accessing your dashboard

1. Log into Sonosite Synchronicity Workflow Manager.
   The dashboard you last used appears.
2. Select the dashboard you want to use from the available dashboards on the page.

3. If you have navigated away from the dashboard, you can return to your dashboard by:
    - Clicking or tapping **Dashboard** at the top of the study list page.

    - Selecting **Dashboard** from the main menu ≡ located in the upper left of the page.

Changing user preferences

1. Log into Sonosite Synchronicity Workflow Manager.
2. To change the default time period, do the following:
    a. In the dashboard, click or tap the menu ••• under **Refine by**.
    b. From the **Default** to drop-down list box, select a time period.
        Studies in the dashboard and study list are filtered using the selected time period.
3. To change your department, click or tap the department in the top navigation bar and select the department of your choice from the drop-down list.
    You are able to view studies and receive alerts according to the department currently selected.

> 📝 **NOTE**
>
> You can only change your department if you are a member of multiple departments.

Checking the software version

- From the main menu ≡ in the upper left corner, click or tap **About**.
    The version number is also available on the Login and Forgot Password pages.

Managing Studies

Using study lists

You can use study lists to view study status, study details including number of images and clips, tags, patient information, and the clinician assigned to each study. You can only view unassigned studies, studies that are assigned to you, and studies that you have submitted to the next stage.

Displaying a study list

1. From the dashboard, select a study list. For example, click or tap **All unassigned** to access a study list showing all unassigned studies.
   The study list opens. Study lists display 20 studies per page.

   > **NOTE**
   > You can only view studies specific to your role. For example, a performing clinician can only view studies that need to be assigned to a performing clinician. You cannot view studies that need to be assigned or have been assigned to an attending clinician or QA reviewer, unless it is a study that you have submitted.

2. To view the next 20 studies in the list, click or tap the forward arrow at the top of the page ⟩ .
3. To view studies that you are working on or have worked on, scroll to the bottom of the page, and check the box under **Your studies**.

Sorting and filtering the study list

By default, the study list is arranged by date and time with the most recent patient exam first.

1. To sort the study list, click or tap **Sort** and choose a sorting method from the drop-down list.
   You can sort by patient last name, study date, received date, exam type, and performing last name.
2. Select filters under **Refine by**.
   The filters available to you depend on your role or roles and include the following:

Age Group	Provider (Admin only)
Content Age	Status
Date Range	Study Type
Exam Type	Worksheets
Gender	Location
Global Tags	Your studies

3. To apply the filters to the study list, click or tap **REFRESH**.

4. Click or tap the arrows to reverse the order ↑↓ or clear the filters by clicking or tapping **CLEAR**.

Searching the study list

You can search using patient name (first and last), medical record number (MRN), date of birth, accession number, location, and age group.

1. To open the search drop-down list box located beneath your profile, click or tap the down arrow ▼ .
2. Type full or partial text in any of the search fields.
   As you type, a list of matching terms appears.

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3. Select a term from the list or finish typing.
4. Click or tap **SEARCH**.
   The study list displays studies that match the search term.

Performing an action on a study in the study list

The action menu is not available until you select one or more studies. You can perform certain actions depending on your user privileges.

1. Select the check box next to the study (or studies).
2. To view the Actions drop-down list, click or tap **Actions** at the top of the page.
3. Select an action from the list:
   • Assign or unassign studies to providers or reviewers
   • Archive clinical studies that have been assigned for QA review (for QA reviewers only)
   • Download studies
   • Send studies to your library (see Using a Library [26])
   • Archive studies to your DICOM server
   • Merge or compare two studies

Viewing studies

1. Do one of the following:
   • From the dashboard, click or tap **All assigned** to view the list of studies assigned to you.
   • From the dashboard, click or tap **All unassigned** to view the list of unassigned studies.
2. To open a study from the study list, click or tap on the details of a study (for example, the patient name).
   The view study page opens with study details on the left and the image viewer on the right.
3. To view study details and worksheet in a full page, hide the image viewer by clicking or tapping the

   › in the upper right corner of the details panel.

4. To close a study and return to the study list, click or tap the ⊗ in the upper right of the view study page.

Viewing a study from a filtered study list

1. In the study list, select filters of interest under **Refine by**.
   The study list displays the filtered set of studies.
2. To open a study, click or tap on the details of a study.
   The selected study opens in the browser window.
3. To navigate to the previous or next study in the filtered list, click or tap the back and forward arrows at

   the top right of the page **‹ ›** .
   The total number of filtered studies are displayed beside the navigation arrows.

Assigning and unassigning studies from the study list

1. Select the check box next to one or more unassigned studies from the study list.
2. Click or tap **Actions**, then click or tap **Assign**.
3. In the pop-up window, click or tap **Assign to `my name'** to assign the study to yourself.

---

4. If you are assigning the study to another person, click or tap **Assign to another `Physician'**, click or tap the ▼ , and choose a name from the drop-down list box.

> 📝 **NOTE**
>
> Only users with the appropriate roles can be viewed in the drop-down list box.
>
> If you assign another person to the study, you cannot perform any further actions on the study.

5. Click or tap **UPDATE**.
   You return to the study list, and the assigned clinician appears in the study details.
6. To unassign a study, select the check box next to one or more studies, click or tap **Actions** then **Unassign**.
   The study disappears from your list of assigned studies.

> 📝 **NOTE**
>
> You can only unassign studies that have been assigned to you.

Assigning studies to a performing clinician from a study

1. From the study list, click or tap on the details of an unassigned study to open it.
2. In the Overview section, click or tap **Assign** under Performing.
3. In the Update assigning pop-up window, you can do one of the following:
   • Select **Assign to `my name'** to assign the study to yourself.

   • Select **Assign to another `Physician'**, click or tap the ▼ , and choose a name from the drop-down list.

   • Select additional performing physicians who can then claim credit for the study.

   • Click or tap the ⊗ to return to the study without performing an action.

> 📝 **NOTE**
>
> If you assign another person to the study, you cannot perform any further actions on the study and are returned to the study list. If you opened the study from a list where you applied specific search and sort criteria, you automatically move to the next study in the list.

4. Click or tap **UPDATE**.

Unassigning and reassigning studies from the study page

1. From the study list, click or tap on the details of an assigned study to open it.
2. In the Overview section, click or tap **Unassign** under Performing next to your name.
3. In the Update performing pop-up window, you can do one of the following:
   • Select **Unassign me**.

   • Select **Assign to another `Performing'**, click or tap the ▼ , and choose a name from the drop-down list box.

   • Click or tap the ⊗ to return to the study without performing an action.

4. Click or tap **UPDATE**.

Managing patient data

You can edit patient information for studies that have been assigned to you. Encounter numbers are required before you can submit your study to the EMR.

Patient information fields

- First name
- Last name
- Patient ID
- Middle name
- Accession number
- Encounter number
- DOB (Date of birth)
- Gender

Adding patient data

1. In the view study page, click or tap **Edit** ⊕ at the top of the page.
    The patient information pop-up window appears.
2. Start a search by entering characters in the name, DOB, and Patient ID fields.
    If Sonosite Synchronicity Workflow Manager is connected to your hospital or clinical information system, a list of matching patients and exams appear in the drop-down list box.
3. Select the patient you want to add to the study.
    The patient information appears in the appropriate fields including accession and encounter numbers, if applicable.

> **NOTE**
> If the patient does not exist in your hospital or clinical system, a notification appears.

4. Click or tap **SAVE**.
5. Click or tap **Update Patient Reconciliation**.
    Sonosite Synchronicity Workflow Manager automatically updates unique accession numbers when available from the DICOM Modality Worklist.

Editing patient data

1. In the view study page, view the patient data information at the top of the page.
2. Click or tap **Edit** ⊕ .
3. Edit the patient information in the pop-up window.
4. To save your edits, click or tap **SAVE**.
5. To cancel your changes, click or tap **CANCEL**.

Splitting studies

If you have not already submitted the study, you can move images or clips from your assigned study to a new study. You cannot split a study if the study is not assigned to you.

1. From the study list, click or tap on the details of an assigned study to open it.
2. In the image viewer panel, select the check boxes of the images and clips you would like to move to a new study.
3. Click or tap **Split** from the image viewer header.
   In the Split Study pop-up window, the check box for **Copy data from current study** is selected by default.
4. Do one of the following:
   - Keep the check box for **Copy data from current study** selected.

   > 📝 **NOTE**
   > If you copy data from the current study, you can only edit the accession number field.

   - If you want to edit study data such as performing, exam type, and patient details, uncheck **Copy data from current study** and do the following:

     a. Select **Assign to me** or select **Assign to others**, then click or tap the ▼ to choose a name from the drop-down list box.
     b. If desired, provide an exam type, worksheet, and new patient details. Use the scrollbar to view all of the details.
        If you start to type in patient data, a list of matching terms appears in the drop-down list box.
5. Click or tap **CREATE**.

   > 📝 **NOTE**
   > Both the original study and the new study are labeled "Split study" in the study list.

Comparing studies

1. From the study list, select the check boxes next to two studies.
2. Click or tap **Actions**, then click or tap **Compare**.
   The image viewer page appears.
3. Click or tap on the tab of one of the two studies in the bottom left of the page.
4. From the thumbnails, select the check boxes of the images you want to compare with images from the other study.
5. Select the other study, then select the check boxes of the images you want from the thumbnails.
6. From the image viewer header, click or tap **Compare**.
   The selected images or clips appear in the page in either a side by side or four image view, depending on the number selected.
7. To view an image in a separate window, click or tap the ↗.

Merging studies

You can merge two studies that are assigned to you if the patient information on both studies matches. You cannot merge more than two studies at a time.

1. From the study list, select the check boxes next to two studies.
2. Click or tap **Actions**, then click or tap **Merge**.
3. In the pop-up window, select the study you want to retain.
   The images and clips in the second study are added to the study selected.

4. Click or tap **MERGE** to merge the studies, or select **CANCEL** to cancel the merge.
5. Click or tap **EXIT** to return to the study list, or click or tap **VIEW THE STUDY** to view the study page.
   The study list displays the merged study instead of the original two studies.

Tagging studies

Global tags are visible by all users.

1. In the Overview section of the study page, tap or click the ••• menu.
2. Click or tap **Tag**.
3. Click or tap in the tag box, and start typing a tag description.
4. Finish entering your text, or select a matching tag from the drop-down list box that appears.

> **NOTE**
> Available tags depend on the exam type selected for the study. If you change the
> exam type or worksheet, any previously entered global tag is removed from the
> study and study images.

5. Click or tap **SAVE**, or close the pop-up by clicking or tapping ⊗.
6. To remove a tag, click or tap on the tag.
   You can remove tags from in-progress studies.

Using study worksheets

You can only select worksheets that are available for that study, including custom worksheets published
by your department. Only the performing clinician can change the exam type and worksheet of a study,
and only if the study has been assigned to them.

1. In the view study page under Exam overview, click or tap the ▼ in the Exam type drop-down list
   box to view the available exam types.
2. Select an exam type from the list.
   If only one worksheet is available for the chosen exam type, Sonosite Synchronicity Workflow
   Manager automatically selects and loads the worksheet.
3. In the Worksheet drop-down list box, click or tap the ▼ to view the available worksheets.
4. Select a worksheet from the list.
   Worksheet-specific fields appear following the non-specific exam fields.
5. Fill in the exam overview and worksheet fields with the desired information.
   Your changes are auto-saved.

Submitting studies

You must select an exam type and worksheet before you can sign and submit a study. Depending on your
workflow, you can choose to submit a study to the EMR (which first sends it to an attending clinician) or
directly to a QA reviewer. For successful EMR submission, patient data and order information must be
correct.

Submitting a study directly for QA review

1. Select an exam type, and fill out the worksheet.
2. Scroll to the bottom of the page, and select **No** under the submit to EMR question.

3. Select the signature box.

   To make further changes to the study, remove your signature.
4. Click or tap **SUBMIT**.

   A confirmation message that the study has been submitted to QA appears, and you return to the study list page.

> 📝 **NOTE**
> If you opened the study from a list where you applied specific search and sort criteria, you automatically move onto the next study in the list.

Submitting a study to the attending

1. Select an exam type, and fill out the worksheet.
2. Scroll to the bottom of the page, and select **Yes** under the submit to EMR question.

> 📝 **NOTE**
> You can set this as your default.

3. Select the signature box.

   To make further changes to the study, remove your signature.
4. Click or tap **SUBMIT**.
5. If your study does not have an encounter number, type in the missing information in the pop-up window.

   The encounter number is usually automatically provided if the application is connected to your hospital or clinical information system.
6. Depending on your department's requirements, you may be asked to provide missing accession numbers; tap or click **Yes** to manually type in the accession number, or select the correct exam from the choices presented in the pop-up window.

> 📝 **NOTE**
> You can submit your study without an accession number, but you must provide an encounter number.

7. Click or tap **UPDATE**.
8. In the Update assignee pop-up window, you can do one of the following:
   • Select **Assign to `my name'** if you are also the attending clinician. You do not see this option if you are not an attending clinician.

   • Select **Assign to another `Attending'**, click or tap the ▼ , and choose a name from the drop-down list box.

> 📝 **NOTE**
> • If you assign another person to the study, you cannot perform any further actions on the study and return to the study list.
> • If you opened the study from a list where you applied specific search and sort criteria, you automatically move to the next study in the list
> • If you are both the performing and attending clinician in a clinical workflow, you can submit the study directly to the EMR. Sonosite Synchronicity Workflow Manager auto-attests your study.

9. Click or tap **UPDATE**.
   A confirmation message that the study has been submitted appears, and you return to the study list page.

> 📋 **NOTE**
> If you opened the study from a list where you applied specific search and sort criteria, you automatically move onto the next study in the list.

Submitting a study to the attending from the ultrasound system

1. Select a remote worksheet from your ultrasound system, then select an attending clinician from the drop-down list in the worksheet.
2. Sonosite Synchronicity Workflow Manager automatically assigns the study to the selected clinician.

Submitting preliminary results to the EMR

1. Select an exam type, and fill out the worksheet.
2. Select the signature box.
   Sonosite Synchronicity Workflow Manager submits the study to the EMR in a preliminary status.

Viewing a PDF of the worksheet

After you sign and submit your study, you can generate a PDF of your procedural worksheet and exam details using Sonosite Synchronicity Workflow Manager.

1. Sign and submit your study (see Submitting studies [13]).
2. Log back into the application by hitting the refresh button of your browser.
3. Find your studies by checking the box under **Your studies**.
4. Open the study from the study list, and click or tap **Preview** at the bottom of the page.
   The PDF opens in a new tab.

Procedure report details
The PDF report for a procedure contains the following details:

- Patient name
- Exam type name
- MR (Medical Record) number
- Patient date of birth
- Gender
- Accession number
- MPI (Master Patient Index) ID
- Visit/Encounter number
- Performing physician name
- Referring physician name
- Study date and time
- Date and time stamp of Physician signature
- Details filled in the procedural worksheet
- Exam overview
- Indications
- Views

- Findings
- CPT codes

Downloading and archiving studies

When you download a study, you are downloading the images and clips from the study.

Downloading a study from the study list

1. Select the study or studies you want to download.
2. Click or tap **Actions**.
3. From the **Actions** drop-down list box, click or tap **Download** to open the Download pop-up window.
4. Select the appropriate option to save your files.
   - **DICOM** Save your images and clips, and structured reports in DICOM format.
   - **Multimedia** Save your images as JPG and your clips as MP4.
5. To remove identifying patient information, click or tap **Yes** under **Anonymize your file(s)**.

> **NOTE**
> If you are downloading an anonymized file, you are prompted to mask patient information in the images and clips associated with the study. See Masking a selected region on an image or clip [23].

6. Select **DOWNLOAD** to download the study, or select **CANCEL** to return to the study.
   The study downloads as a zipped file in your browser.

> **NOTE**
> Anonymized data is not sent to the EMR.

Downloading a study from the study page

1. In the Overview section of the study page, tap or click the ••• menu to open a drop-down list box.
2. Click or tap **Download** to open the Download pop-up window.
3. Select the appropriate option to save your file or files.
   - **DICOM** Save your images and clips, and structured reports in DICOM format.
   - **Multimedia** Save your images as JPG and your clips as MP4.
4. To remove identifying patient information, click or tap **Yes** under **Anonymize your file(s)**.

> **NOTE**
> If you are downloading an anonymized file, you are prompted to mask patient information in the images and clips associated with the study. See Masking a selected region on an image or clip [23].

5. Select **DOWNLOAD** to download the study, or select **CANCEL** to return to the study.
   The study downloads as a zipped file in your browser.

> **NOTE**
> Anonymized data is not sent to the EMR.

Archiving a study

A study can only be moved to the DICOM archive if it has been submitted to the EMR and has been QA archived by a QA reviewer.

1. Select the check box next to one or more studies from the study list.
2. Click or tap **Actions**, then click or tap **DICOM Archive**.
3. In the DICOM Archive window, select your PACS from the drop-down list box or type in the address.
4. Click or tap **SUBMIT**.
   The selected studies are sent to the DICOM archive.

Using reports

You can use the reports page to view a summary of your activity on Sonosite Synchronicity Workflow Manager or view a list of scheduled credentialing programs. For each credentialing program, view due dates, percent completion, total number of worksheets and the number completed, credits, scoring, and other information.

1. To navigate to the report page:
   • Click or tap **VIEW REPORTS** at the bottom of the dashboard.

   • From the main menu ☰ in the upper left corner, click or tap on **Report**.
2. To view and sort details, click or tap **View details** under a specific program.
   On the report details page, you can view such details as the number, type, and quality of worksheets completed. You can also view bar graphs of your progress for each type of worksheet.
3. To navigate back to the report home page, click or tap the navigation link to return to the previous page.

Sending email reports and notifications

You can choose to have a summary of your activity sent to your email.

1. On the report page, click or tap the menu •••.
2. From the drop-down list box, click or tap **Email report**.
   A copy of the report is sent to your email.
3. To customize email notifications, do the following
   a. Drag the **Email notifications** slider to the right.
      The slider turns green, and "Yes" appears.
   b. From the pop-up menu, select the email frequency.
   c. Click or tap **edit** to change the email frequency.

Attesting Studies

This section describes how to use Sonosite Synchronicity Workflow Manager as an attending clinician.

Assigning studies to an attending clinician

As an attending clinician, you can assign studies that need their worksheets filled out to a performing clinician. See Assigning studies to a performing clinician from a study [10].

Performing clinicians are able to assign their studies to an attending clinician when they submit their studies. You can also assign studies to an attending (including yourself) if the studies have been submitted for attestation without being assigned.

Assigning a study to the attending from the study page

To use the study list to assign studies, see Assigning and unassigning studies from the study list [9].

1. From the study list, click or tap on the details of a study to open it.
2. In the Overview section, click or tap **Assign** under **Attending**.
3. In the Update assignee pop-up window, you can do one of the following:
   - Select **Assign to `my name'** if you are the attending clinician.
   - Select **Assign to another `Physician'**, click or tap the ▼, and choose a name from the drop-down list box.
   - Click or tap the ⊗ to return to the study without performing an action.
4. Select **UPDATE**, or select **CANCEL** to cancel your action.

> 📝 **NOTE**
> - If you assign another person to the study, you cannot perform any further actions on the study and return to the study list.
> - If you opened the study from a list where you applied specific search and sort criteria, you automatically move onto the next study in the list.

Unassigning and reassigning an attending from the study page

1. From the study list, click or tap on the details of a study assigned to you.
2. In the Overview section, click or tap **Unassign** under Attending next to your name.
3. In the Update assignee pop-up window, you can do one of the following:
   - Select **Unassign me**.
   - Select **Assign to another `Physician'**, click or tap the ▼, and choose a name from the drop-down list box.
   - Click or tap the ⊗ to return to the study without performing an action.
4. Click or tap **UPDATE**.

Submitting studies as an attending

1. From the study list, click or tap on the details of a study assigned to you.
2. In the Overview section, select **No** under the submit to EMR question.

3. Review the study images, clips, and worksheet.

    You can edit study details if it is part of a clinical workflow, but you cannot change the exam type or worksheet.

4. Scroll to the bottom of the page, and select the signature box.

5. Click or tap **SUBMIT**.

6. If your study does not have an encounter number, type in the missing information in the pop-up window.

    The encounter number is usually automatically provided if the application is connected to your hospital or clinical information system.

7. Click or tap **UPDATE**.

8. Depending on your department's requirements, you may be asked to provide missing accession numbers; tap or click **Yes** to manually type in the accession number, or select the correct exam from the choices presented in the pop-up window.

    > **NOTE**
    >
    > You can submit your study without an accession number, but you must provide an encounter number.

9. Click or tap **UPDATE**.

    A confirmation message that the study has been submitted appears, and you return to the study list page

    > **NOTE**
    >
    > If you opened the study from a list where you applied specific search and sort criteria, you automatically move onto the next study in the list.

Dealing with failed submissions

You can view and resubmit studies that have failed EMR submission. Make sure that your system administrator has fixed the reason for the failure before you resubmit to the EMR.

1. To view studies that have failed EMR submission, you can do one of the following:
    - From your dashboard, click or tap on the **failed studies to EMR** link found in the Overview section to view a list of studies that have failed EMR submission.
    - From the study list, select the check box next to **Submission to EMR failed** to filter the study list.

2. To resubmit a study to the EMR, do the following:
    a. From the study list, select the check box next to the study.
    b. Click or tap **Actions**, then click or tap **resubmit to EMR**.
    c. In the Resubmit studies window, click or tap **OK**.

QA Reviewing Studies

This section describes how to use Sonosite Synchronicity Workflow Manager as a QA reviewer.

Viewing studies sent for QA review

1. Do one of the following:
   a. From the QA/Reviewer dashboard, click or tap **Assigned** from either the Clinical or Educational widget to view the list of studies assigned to you for review.
   b. From the QA/Reviewer dashboard, click or tap **Unassigned** from either the Clinical or Educational widget to view the list of unassigned studies that need reviewing.
2. From the study list, click or tap on the details of an assigned study to open it.
3. View the study in the browser window.

Assigning studies to a QA reviewer

As a QA reviewer, you can assign studies that need their worksheets filled out to a performing clinician. See Assigning studies to a performing clinician from a study [10].

Assigning a study to a QA reviewer from the study page

To use the study list to assign studies, see Assigning and unassigning studies from the study list [9].

1. From the unassigned study list, click or tap on the details of a study to open it.
2. In the Overview section, click or tap **Assign** under **QA Reviewer**.
3. In the Update assignee pop-up window, you can do one of the following:
   • Select **Assign to `my name'** if you are the QA reviewer.
   • Select **Assign to another `Physician'**, and choose a name from the drop-down list box.
   • Click or tap the ⊗ to return to the study without performing an action.
4. Click or tap **UPDATE**.

> 📝 **NOTE**
> • If you assign another person to the study, you cannot perform any further actions on the study.
> • If you opened the study from a list where you applied specific search and sort criteria, you automatically move onto the next study in the list.

Unassigning and reassigning a QA reviewer

1. From the assigned study list, click or tap on the details of a study to open it.
2. In the Overview section, click or tap **Unassign** under QA Reviewer next to your name.
3. In the Update assignee pop-up window, you can do one of the following:
   • Select **Unassign me**.
   • Select **Assign to another `Physician'**, and select a name from the drop-down list.
   • Click or tap the ⊗ to return to the study without performing an action.
4. Click or tap **UPDATE**.

Using the QA worksheet

You can use the QA worksheet to review both clinical and credentialing studies.

1. From the assigned study list, click or tap on the details of a study to open it.
2. Review the study images, clips, and worksheet.
3. At the bottom of the page, click or tap the **Quality assurance review** tab (if it is not open already).
    The QA worksheet opens.
4. Fill out the QA worksheet. Worksheet details depend on your departmental settings.
    Any changes you make are auto-saved.
5. For credentialing studies:
    *   To give credit, click or tap **Yes**.
    *   If the study does not meet credit criteria, click or tap **No**.
6. To sign the review, select the signature check box.
7. To provide email feedback to the performing clinician, select the appropriate check box.
8. Click or tap **SUBMIT**.

QA archiving studies

Once a study has been assigned for QA review, the reviewer can move it to the QA archive. QA reviewers can only QA archive studies that are not part of a credentialing program and do not need to be given credit.

1. Select the check box next to one or more QA assigned studies from the study list.
2. Click or tap **Actions,** then click or tap **QA archive**.
    The selected studies are automatically sent to the QA archive.

Managing Images

This section discusses how to view and manage images and clips using Sonosite Synchronicity Workflow Manager. You are able to view and download the images and clips from any study available to you in a study list.

Viewing images and clips

The view study page displays images and clips as thumbnails in the image viewer panel. The image or clip number and total number of images and clips are shown. By default, the first image or clip in a series is displayed in the image viewing area.

1. To view the next or previous image or video clip, click or tap a forward or backward arrowhead located to the right or left of the image or thumbnails.
2. To view a full page image or clip, do one of the following:
   - Click or tap the ⬆ underneath the image to view the image in a new browser window.
   - Click or tap the ‹ in the upper left corner of the image viewer to hide the study details and worksheet.
3. To zoom in and out on the image, click or tap the **Zoom** tool.
4. To view multiple images or clips, repeatedly click or tap **Layout** to view images in single, side by side, or four image format.

Playing a clip

1. In the image viewer, navigate to a clip using the forward and back arrowheads ⌃ ‹ .
2. Click or tap ▶. The clip plays automatically after loading. The load time depends on clip length.
3. While viewing a clip, do any of the following:
   - To freeze the clip, click or tap pause ▐▐. To resume, click or tap ▶.
   - To change the playback speed, click or tap the frame rate icon ⏱ , then select a frame rate from the pop-up list.
   - If the clip is paused, click or tap ▶▌ and ▌◀ to view the clip frame by frame.

Panning, inverting, and rotating an image or clip

1. Click or tap the drop-down arrow to view all the choices under the **Pan/Rotate/Invert** tool.
2. To pan, click or tap the **Pan** tool then click or hold your finger down on the image and drag to move it in the image viewer.
3. To invert, click or tap the **Invert** tool.
   The image appears in contrast color mode.
4. To rotate, click or tap the **Rotate** tool then click or hold your finger down on the image and drag to rotate it.
5. To reset the image or clip, click or tap **Reset**.

Comparing images or clips

1. In the image viewer, select the check boxes of up to four images or clips.

2. At the top of the page, click or tap **Compare**.
   The selected images or clips appear in the page in either a side by side or four image format, depending on the number selected.

Hiding or displaying annotations and measurements

• In the image viewer, click or tap **Hide/Show** on the right side of the image.
  Any annotations or measurements you have added to the image using Sonosite Synchronicity Workflow Manager are hidden or shown.

> **NOTE**
> You cannot hide the annotations and measurements added on the ultrasound system.

Labeling and measuring images and clips

You can annotate images and clips in both the image viewer panel and the full page image viewer on studies that have been assigned to you. Any measurements or annotations made to images and clips are auto-saved.

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

Placing an arrow and adding text to an image or clip

1. In the image viewer, click or tap the **Arrow/ROI/Mask** tool.
2. In the fly-out panel, click or tap the **Arrow** tool.
3. To place an arrow, click or tap where desired and use a dragging motion to determine the size and rotation.
4. To set the arrow, release the mouse button or lift your finger.
   A text box appears next to the arrow.
5. Enter your text in the text box, and click or tap **OK**.

Masking a selected region on an image or clip

> **NOTE**
> If you are masking a clip, pause it first. The masked area applies to all frames.

1. In the image viewer, click or tap the **Arrow/ROI/Mask** tool.
2. In the fly-out panel, click or tap the **Mask** tool.
3. To place a masking box, click or tap where desired and use a dragging motion to size the box.
   The selected area is highlighted by a dotted rectangle, and is masked when the image is downloaded.

Marking a region of interest on an image or clip

1. In the image viewer, click or tap the **Arrow/ROI/Mask** tool.
2. In the fly-out panel, click or tap the **ROI** tool.
3. Draw a shape by connecting the nodes.
4. Close the loop, and click or tap an area outside of the region to start a new shape.

Tagging an image or clip

1. Click or tap ▌ displayed in the image or clip thumbnail.
2. Click or tap in the tag box, and start typing a tag description.
3. Finish entering your text, or select a matching tag from the drop-down list box that appears.

> **NOTE**
> Available tags depend on the exam type selected for the study. If you change the exam type or worksheet, any previously entered global tag is removed from the study and study images.

4. Click or tap SAVE, or close the pop-up by clicking or tapping ⊗.
   Tags are auto-saved.

5. To remove a tag, click or tap ▌, then click or tap the tag in the text box.

Measuring distance

1. In the image viewer, select the **Ellipse/Angle/Length** tool.
2. In the fly-out panel, select the **Length** tool.
3. Click or tap where desired, and use a dragging motion to draw a line.
   The distance in mm appears.
4. Adjust the distance by moving the end points of the line.

Measuring area and circumference

1. In the image viewer, click or tap the **Ellipse/Angle/Length** tool.
2. In the fly-out panel, click or tap the **Ellipse** tool.
3. Click or tap where desired, and use a dragging motion to draw an ellipse.
   The area, mean, and standard deviation appear.
4. To resize the ellipse, click or tap on the handles and drag them.

> **NOTE**
> You can also use the ROI tool to measure an area.

Measuring the angle between two lines

1. In the image viewer, click or tap the **Ellipse/Angle/Length** tool.
2. In the fly-out panel, click or tap the **Angle** tool.
3. Click or tap where desired.
   Three handles appear on the image.

4. Adjust the angle by clicking or tapping on the handles and moving them.

Selecting a label or measurement

Before performing a specific action on a label or measurement, you must select it first.

1. While viewing an image or clip, click or tap the annotation or measurement tool located in the sidebar.
2. In the fly-out panel, click or tap the tool that matches the label or measurement you are selecting.
3. With the tool highlighted, hover over the label or measurement until it turns green.
4. Click or tap the label to select it.
   You are now able to move and change the color of the label or measurement, and perform other actions.

Deleting labels or measurements from an image or clip

1. While viewing an image or clip, select the label or measurement.
2. Double-click using the left mouse button, or double-tap the label or measurement.
   A pop-up window appears.
3. Select **YES** to delete the label or measurement.

Deleting images and clips

- Click or tap the trash can 🗑 displayed in the image or clip thumbnail.
  You can undo the delete action by clicking or tapping **Undo** in the pop-up message. The pop-up disappears after a few seconds.

> 📝 **NOTE**
> Details are logged whenever a user deletes an image or clip from a study.

Using a Library

If you are a part of a credentialing program, you can use Sonosite Synchronicity Workflow Manager software to create a library of images and clips that can be used for educational purposes.

Creating a library

You can create a library by sending studies to your library. You can send unassigned studies or studies that have been assigned to you, but not yet submitted. If you send a study multiple times, the library keeps multiple copies of the study in the state it was sent in.

Sending a study to the library from a study list

1. Select the check box next to one or more studies from the study list.
2. Click or tap **Actions**, then click or tap **Library**.
   The selected studies are automatically sent to the your library.

Sending images and clips to the library

1. From the thumbnails, select the check boxes of one or more images or clips.
2. Click or tap **Send to** in the upper right of the image viewer panel.
3. From the drop-down menu, select **Library**.
   The selected images and clips are sent to your library.

> **NOTE**
> Images and clips sent to your library display the watermark "Education Purpose Only."

Using your library study lists

Your library study list behaves similarly to other study lists. See Using study lists [8].

To view your library study list, do the following:

1. Click or tap the main menu ☰ in the upper left corner.
2. From the drop-down list, click or tap **Library**.
   A list of the studies contained in your library appears.

Applying filters to a library study list

1. In the study list, select filters of interest under **Refine by**.

Provider	Gender
Exam types	Content type
Worksheets	Global tags

The filters available in the library study list differ slightly from other study lists. You can filter a library study list using tags.

> **NOTE**
> If you filter the study list using a tag, clip and image icons appear in the study rows of the studies containing tagged images and clips. To tag images and clips, see Tagging an image or clip [24].

2. To apply the filter to the study list, click or tap **REFRESH**.
3. To clear the filters, click or tap **CLEAR**.

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

Terms

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).

ACEP	American College of Emergency Physicians
Archive	Primarily defined as a copy of files transferred to a DICOM server, and is synonymous with Transfer. However, Archive may be additionally associated with a more rigorous external data management solution that may include, although not be limited to, long-term secure storage and audit trails.
Attending	A physician who has completed residency and practices medicine in a clinic or hospital.
Attestation	A signature provided by a qualified clinician as proof that a procedure performed on a patient has been reviewed and approved. Often used for procedures that have been submitted for billing.
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.
Credentialed clinician	Clinician that attained certification through an ultrasound accreditation program. Clinicians with credentialed rights are entitled to complete a worksheet, sign it, and send the associated report to EMR.
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.
DICOM Structured Report	The DICOM Structured Report (DICOM SR) is a document that uses a standardized set of codes and information.
EHR	An EHR (Electronic Health Record) is a digital record of a patient's health information that is designed to be used by multiple providers and facilities.

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.
Exam	An association of customizations specific to a clinical procedure.
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.
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.
Non-credentialed clinician	A clinician that didn't attain certification through an ultrasound accreditation program. Clinicians without credentialed rights can review patient worksheet data, set their findings and mark the worksheet, as ready to be reviewed by an Attending or QA clinician.
PACS	PACS (Picture Archival and Communication System) is a medical imaging technology used primarily in healthcare organizations to securely store and digitally transmit electronic images and clinically-relevant reports.
Patient study	A collection of one or more image/report data series. A study can have several associated exam types.
Performing	A clinician who performs the exam on the patient.
Practicing physician	The emergency physician not previously exposed to training in emergency ultrasound during residency.
QA clinician	A clinician with QA permission. Clinicians with QA permission review the findings of non-credentialed clinicians enrolled in an ultrasound accreditation program. In C2, their agreements to non-credentialed clinicians' findings count for the required program passing scores.
Quality Assurance (QA)	The process by which non-credentialed clinicians get their ultrasound examinations and findings reviewed by a QA clinician and get feedback.
Resident	A physician in residency training.
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.

Transfer   Communication with an external component (for example, a database
                              server or a remote file system) to duplicate locally stored content.

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