GE HealthCare

Workflow Manager 8.0
Common Tasks Quick Reference Guide

ⓘ Some features and functions in this job aid are optional, configurable features and may require appropriate user privileges.

📄 For more detailed information about features in this job aid, refer to the *Workflow Manager User Manual* and the *Universal Viewer User Manual*.

📄 For an overview of worklist components, icons, and preferences, refer to the *Workflow Manager 8.0 Quick Reference Guide*.

Searching for an Exam

Quick Search

1. (Optional) Click ⌄ next to the search fields at the top of the window and select the repositories you want to search.

2. Click in the **Last Name, First Name, MRN/Patient ID**, or **Accession Number** field.

3. Enter your search criteria and then press Enter or click Search 🔍.

Advanced Search

1. Click ⬌ next to the Quick Search fields.

2. Enter your search criteria and then click **Search**.

Tips:

- Click the **Patient Name** field to:

  o Display and select one of your most recent entries.

  o Select a date search option.

- When searching by **MRN/Patient ID** or **Accession Number**:

  o The entries must exactly match the MRN/Patient ID or Accession Number in the database (including any zeroes at the beginning of the number).

  o You can use % to perform wildcard searches.

  o The search uses all dates by default.

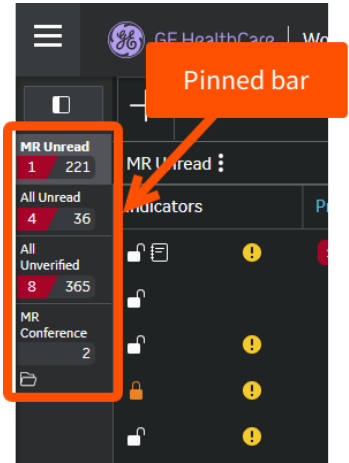- The **Accession Number** field is case sensitive.

Notes:

- You can save an advanced search as a custom worklist (on the Advanced Search window, click **Save as worklist**).

- Advanced search does not support searching remote sites/repositories. Use Quick Search instead.

📋 If you do not have privileges to view confidential patients, patients marked as confidential are not included in your search results.

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Accessing Worklists

➢ In the Workload Manager, click the menu button ☰ and do one of the following:

- o Select a worklist on the Worklists tab.
- o Click **+ Create Worklist** to create and save a new worklist.
- o Select a folder on the Saved Exams tab.

➢ Select a worklist/folder from the pinned bar on the left.

## Pinning Worklists and Folders for Quick Access

Task	Steps
Pin a worklist for quick access	1. Click the menu button ☰ to display the Worklists menu. 2. Hover over the worklist name and click the pin icon 📌.
Remove worklist from pinned bar	1. Click the menu button ☰ to display the Worklists menu. 2. Click the pin icon 📌.
Rearrange worklists in pinned bar	1. Drag and drop the worklists into the desired order. 2. The worklist order persists across sessions.

Full or Split Screen Mode

➢ Click the **Split/Full** button [ ] in the Workload Manager to toggle the screen mode between full and split.

The mode selected is retained and remains the same the next time you log into the system ("sticky").

In card view (split), the button turns blue [ ].

Sorting Worklists

➢ Click a column header.

➢ Click the **Default sort** button above the worklist to return it to the system-defined or user-created worklist settings.
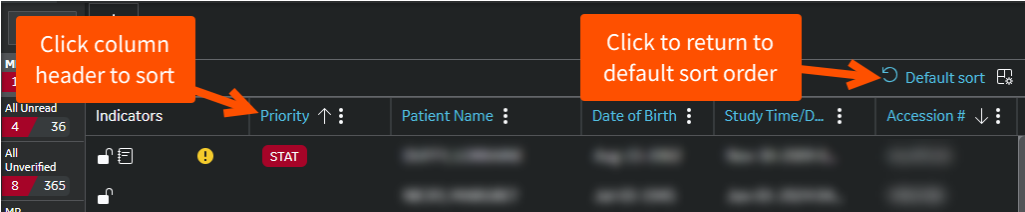
- • The sort order is retained for the current login session and is reset when you log out.

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- You can display STAT (priority) exams at the top, bottom, or in-line with other exams in the worklist. When you sort by priority, you can sort by one additional data element.

- If a worklist is defined to have the highest priority exams on top, then you cannot sort that worklist to display exams in-line with other exams.

Filtering Worklists

A. Click the kabob ⋮ icon next to column header and then enter search text or select from predefined filter items (e.g., modality, status, etc.).

B. Applied filter indicators

C. Removing filters:

- Click the **X** in the filter bubble to remove an individual filter.

- Click **x Clear all** to remove all filters.

- Click the filter icon next to the worklist name in the pinned bar.

Creating a Folder and Saving Exams

Task	Steps
Creating a folder	1. Click the menu button ☰ to display the Worklists menu. 2. Click **Saved Exams**. 3. Click **+ New Folder**. 4. In the **Name of new folder** field, enter a name. 5. (Optional) To require that a user add a description for each exam saved in the new folder, select the **Require description when saving exam** checkbox. 6. (Optional) To nest the new folder under an existing folder, select **Nest folder under** and then select the parent folder. 7. (Optional) To share the folder with others, click **Shared with** and select the user(s)/user group(s) with whom you want to share the folder. 8. Click **Create**.
Saving an exam(s) to a folder	1. Right-click an exam in a worklist, exam tab or the Diagnostic Hub and select **Save Exam**. 2. Create or select a folder and enter a description (if required). 3. Click **Save**.

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Task	Steps
Pinning a saved folder for quick access	1. Click the menu button ☰ and then click **Saved Exams**. 2. Hover over the folder name and click the pin icon 📌. 3. To arrange items in the pinned bar, drag and drop items into the desired order. 4. To unpin, click the pin icon 📌 again.

Resolving Exceptions

Users with appropriate privileges can access the Exceptions Worklist to view and resolve exceptions. Refer to the *Workflow Manager 8.0 Exception Management Job Aid*.

Merging Patient Records

Users with appropriate privileges can merge patients from within WFM via the right-click menu. Refer to the *Workflow Manager 8.0 Merging Patient Records Job Aid*.

Study Management

Users with appropriate privileges can merge studies, split studies, merge series, split series, and change exam information. Refer to the *Workflow Manager 8.0 Study Management Job Aid*.

Scanning Documents

Users with appropriate privileges can scan documents. Refer to the *Universal Viewer and Workflow Manager 8.0 Document Scanning Job Aid*.

Changing Exam Status

➢ For a single exam, right-click the exam in a worklist, the Exam Tab, or in the Diagnostic Hub, and then select a status.

➢ For multiple exams, select the exams using CTRL + Single-click or SHIFT + Single-click, then right-click and select a status.

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Viewing Studies and Images

Previewing a Study

➢ Single-click the exam in the worklist.

   The reporting application and the viewer do not launch.

Viewing Images in Preview Mode without Launching Reporting

➢ With an exam loaded in the Diagnostic Hub, click **View Images**.

   The reporting application does not launch.

Viewing Study Information and Launching Images

➢ Double-click an exam in the worklist.

   The reporting application and the image viewer launch.

Viewing Reports, Order Information and/or Exam Notes for a Primary Exam

➢ With an exam loaded in the Diagnostic Hub, click the appropriate tab in the primary exam packet.

Viewing a Report or Note from the Image Viewer

With a study launched in the viewer, do one of the following:

➢ In the Navigator Timeline, click an underlined date in the timeline tile.

➢ In the Study Selector, click the report icon 📝 in the study row.

➢ In the viewport title bar, click the Show Reports button 📝.

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Manipulating Images and Other Image Viewer Tasks

Enable Window/Level to Alter Brightness or Contrast

Do one of the following:

➢ Press and hold the right mouse button and drag the mouse left/right (for contrast) or up/down (for brightness) and release the mouse when you achieve the desired contrast/brightness. (Default mouse configuration.)

➢ Click **W:** or **C:** in the image overlay (hot zone), then click and drag the mouse left/right (for contrast) or up/down (for brightness) and release the mouse when you achieve the desired contrast/brightness.

   Tip: To reset the mouse function back to its default operation, click the image number (Ser/Img) in the viewport hot zone, click the Page/Scroll button on the toolbar, or enable the Quick Restore Mouse Function keyboard shortcut via the Layout Editor.

➢ Right-click in a viewport, select **Preset Window** and then select a preset.

➢ Click the Window/Level button 🔆 in the toolbar, click and drag the mouse left/right (for contrast) or up/down (for brightness), and release the mouse when you achieve the desired contrast/brightness.

   Note: Preset window levels can be associated with the keys on the numeric keypad for quick selection. Refer to the *Universal Viewer 8.0 Window Level Presets Job Aid*.

Display a Series in a Series Window and Rearrange Displayed Series

Determine where an Image is Located

1. In the Navigator click and hold the thumbnail.

2. The corresponding series window flashes indicating the location of the image.


Tip: Turn on the **Show Viewport Grid** user preference (Navigator Options > Navigator) to display monitor indicators above the thumbnails and a grid on thumbnails indicating the monitor and viewport in which the image displays.
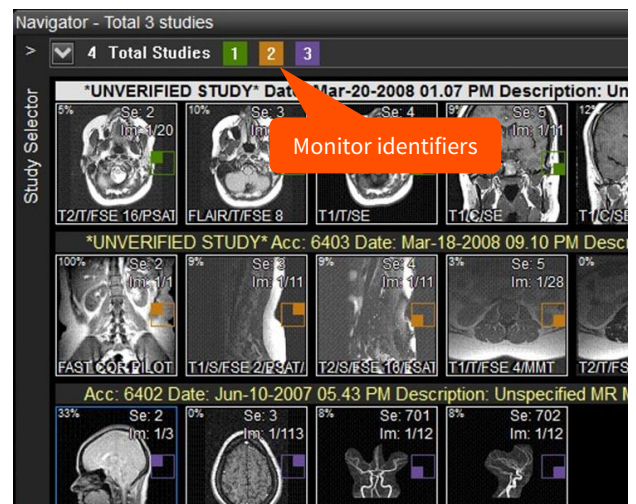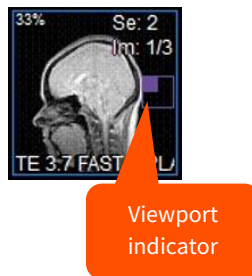
Display a Series using the Navigator

1. In the Navigator, do one of the following:

   • Click a thumbnail and drag it to a series window.

   • Click a thumbnail and drag the mouse cursor slightly within the thumbnail.

   The Snap Tool displays as an overly on the thumbnail. Each monitor is represented as a different color. (If the **Show Viewport Grid** user preference is enabled, a monitor identifier color key displays at the top of the Navigator).
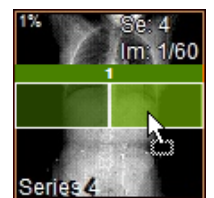
2. Move the mouse cursor to the desired viewport and then release the mouse cursor to display the series the selected viewport.

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Add Thumbnails to the Navigator

Task	Steps
Using the Study Selector	➢ In the Study Selector, click the study to display its thumbnails in the Navigator.

Using the Series Selector	1. To display the Series Selector, do one of the following:
	
	   a. Hover over the series and image number hot zone in the image overlay.
	
	   b. Click the study date and time hot zone in the image overlay.
	
	2. In the Series Selector, hover over the study row to expand the series list and select the series to display.

Page through Images in a Series

Do one of the following:

➢ Click and drag to scroll (down or up).

➢ Use the mouse scroll wheel.

➢ Use the up/down arrow keys.

> 🗒 UV provides many scrolling alternatives, including shortcut keys such as **Insert** to go to the middle image, **Home** to go to the first image, and **End** to go to the last image of the series.

Access Other Viewer Features

Access other features via the:

➢ Main menu.

➢ Main toolbar.

➢ Right-click in a viewport to display the series menu.

> 💡 Hover over any toolbar button to view a tooltip indicating the button's function.

Reporting on an Exam

1. From a worklist, double-click the exam on which you want to report.

   The reporting system automatically launches if you have the **Auto Launch Dictation** user preference enabled. Otherwise, click the **Report** button in the Diagnostic Hub.

2. Interpret the exam and use the reporting system to create the report.

3. Select the appropriate read status in the reporting system.

   The image viewer and reporting system are closed, image viewer Done Options are executed, and the Diagnostic Hub is cleared. Any non-finalized (not signed) exams are added to the Unsigned worklist.

4. If the **Auto Advance Exam** user preferences are enabled, the next unlocked exam launches.

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Closing an Exam without Reporting

➢ Click the **X** on an exam tab in the Diagnostic Hub.

The exam, reporting application, and the image viewer close with a single click and auto advance (if enabled) stops. Double-click an exam to re-start auto advance.
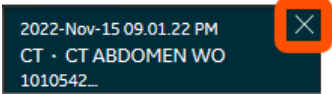
Clearing the Diagnostic Hub

➢ Click the **X** on an exam tab in the Diagnostic Hub.

The exam is removed from the Diagnostic Hub.

Accessing the User Manual

Access from:	Steps
Workflow Manager	➢ Click the username drop down ⌄ in the Masthead and select **Help**.
Universal Viewer	➢ In the main menu, click **Help** and select **Display Help Page.**

Setting User Preferences

1. Click the preferences button ⚙ in the Masthead.

2. Enable/disable items as appropriate.

3. Select **Workflow Preferences** or **Viewer Preferences** to access additional preferences.

> 🗋 For detailed information about user preferences, refer to the *Workflow Manager User Manual* and the *Universal Viewer User Manual*.

Ending Your Session (Logging Out)

➢ Click the username drop down ⌄ in the Masthead and select **Sign Out**.