



Client User Guide

Table of Contents

GETTING STARTED	3
Create an Account	3
USER ROLES	5
Group Admin	5
Clinical Manager	6
CASE LIFECYCLE	10
Manual Upload	10
Grid vs. List View	11
Accessing Reports	12
Merge and Split Cases	13
CLIENT ONBOARDING	14
B-Read	14
DICOM Router	15
How it Works	16
How to reset Ambra Router	17
HL7	18
Technical Integration	18
How it Works	19

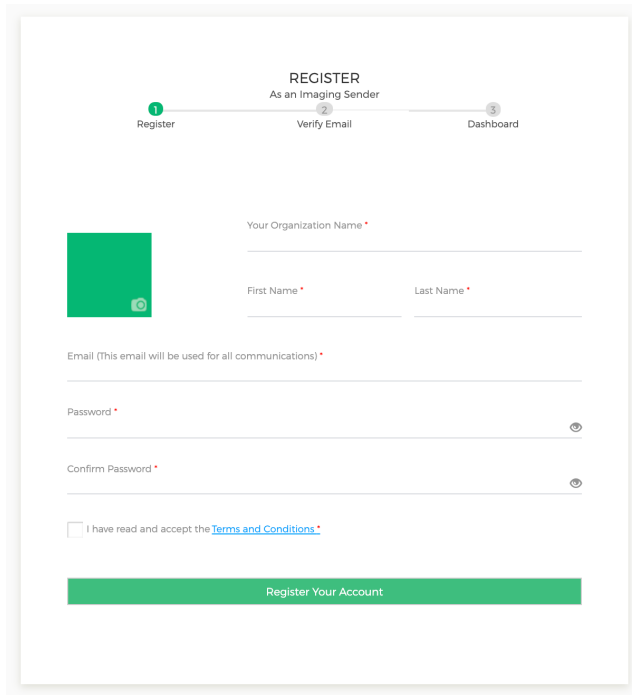
GETTING STARTED

To create an account: <https://app.docpanel.com/#/verifyAndRegister1c>

After verification, login at [docpanel.com](https://app.docpanel.com)

For support contact: support@docpanel.com or call 856-242-7343

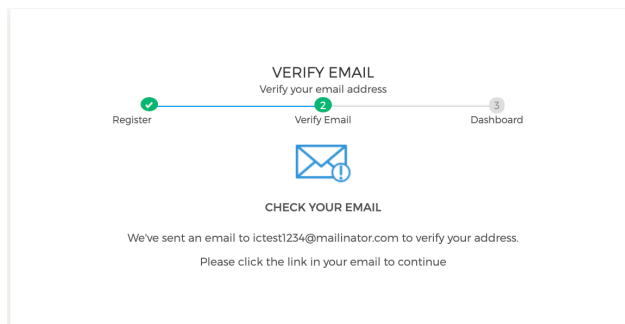
- Register your account by adding the centers information



The screenshot shows the 'REGISTER' page for an imaging sender. At the top, a progress bar indicates three steps: 1. Register (highlighted in green), 2. Verify Email, and 3. Dashboard. The main form contains the following fields and elements:

- A green profile picture placeholder with a camera icon.
- 'Your Organization Name' field with an asterisk.
- 'First Name' and 'Last Name' fields, both with asterisks.
- 'Email (This email will be used for all communications)' field with an asterisk.
- 'Password' field with an asterisk and a toggle icon.
- 'Confirm Password' field with an asterisk and a toggle icon.
- A checkbox labeled 'I have read and accept the [Terms and Conditions](#)' with an asterisk.
- A large green button labeled 'Register Your Account'.

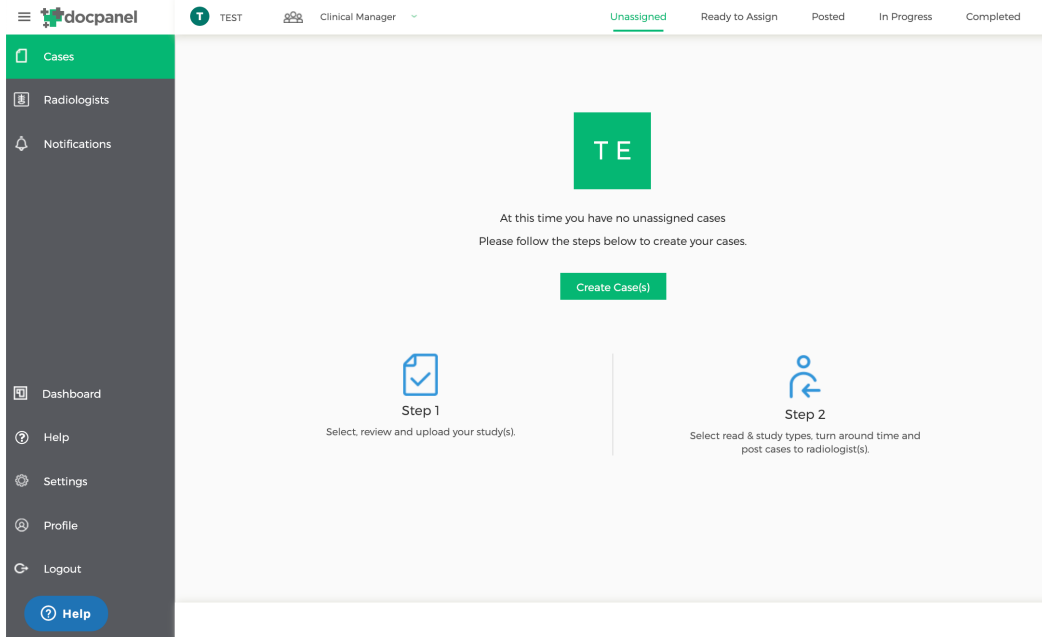
- You will receive an email notification to verify your email address



The screenshot shows the 'VERIFY EMAIL' page. At the top, a progress bar indicates three steps: 1. Register (checked with a green checkmark), 2. Verify Email (highlighted in green), and 3. Dashboard. The main content includes:

- An envelope icon with a checkmark and a '1' in a circle.
- The text 'CHECK YOUR EMAIL'.
- The message: 'We've sent an email to icest1234@mailinator.com to verify your address. Please click the link in your email to continue'.

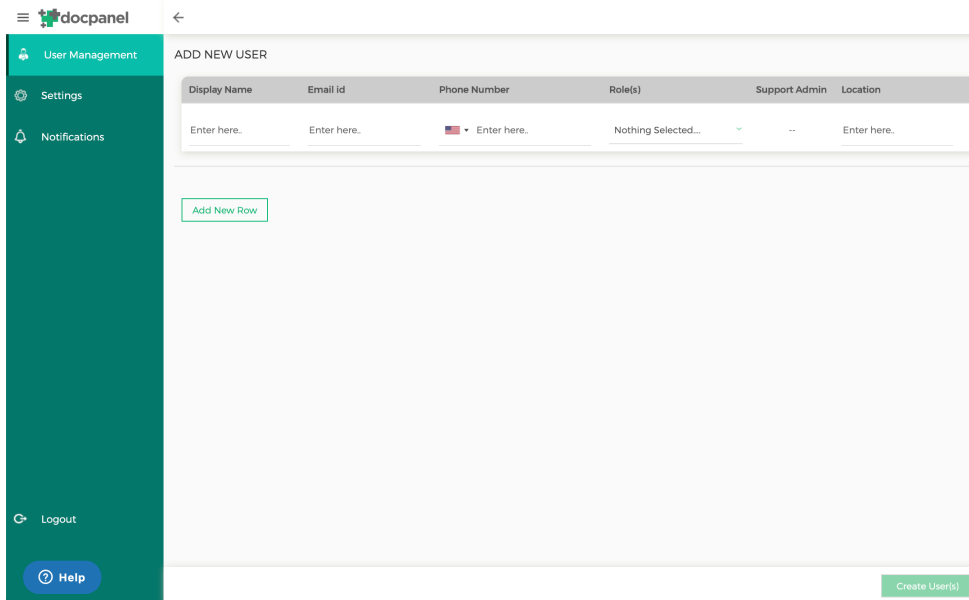
- After verification, you can log into your account which will look like this



USER ROLES

Group Admin

For adding users and payment information to your account. Fill fields shown below to add multiple users in the User Manant tab.



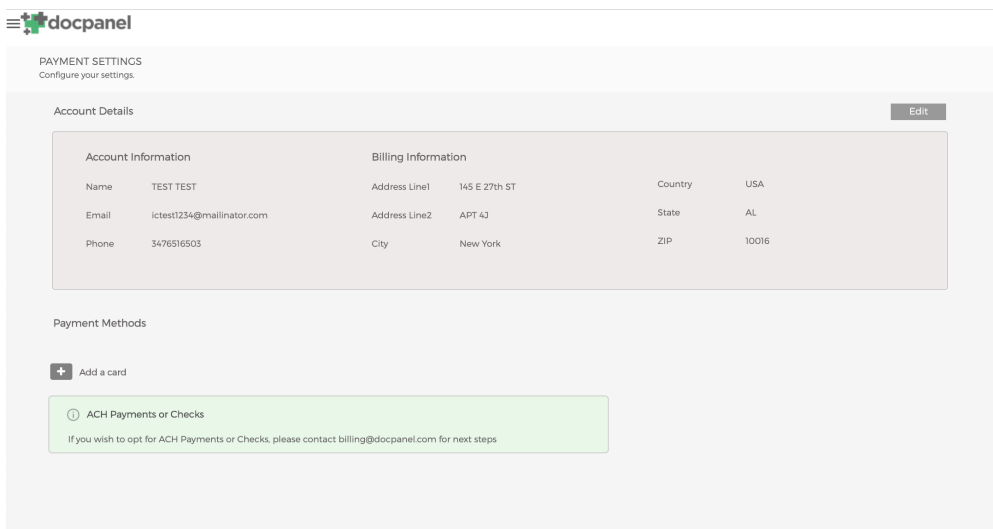
The screenshot shows the 'ADD NEW USER' form in the docpanel interface. The form has a table with the following columns: Display Name, Email Id, Phone Number, Roles, Support Admin, and Location. Each column has an input field with the placeholder text 'Enter here..'. The Roles column has a dropdown menu with 'Nothing Selected...' and a plus sign. Below the table is an 'Add New Row' button. At the bottom right of the form is a 'Create User(s)' button. The left sidebar contains 'User Management', 'Settings', 'Notifications', 'Logout', and 'Help'.

Display Name	Email Id	Phone Number	Roles	Support Admin	Location
Enter here..	Enter here..	🇺🇸 Enter here..	Nothing Selected...	--	Enter here..

Settings

Payments - Your Credit/Debit Cards can be added here

Email billing@docpanel.com if you wish to opt for ACH Payments or Checks



The screenshot shows the 'PAYMENT SETTINGS' page in the docpanel interface. The page has a header 'PAYMENT SETTINGS' and a sub-header 'Configure your settings.'. Below the header is an 'Account Details' section with an 'Edit' button. The 'Account Details' section is divided into two columns: 'Account Information' and 'Billing Information'. The 'Account Information' column contains fields for Name, Email, and Phone. The 'Billing Information' column contains fields for Address Line1, Address Line2, City, Country, State, and ZIP. Below the 'Account Details' section is a 'Payment Methods' section with an 'Add a card' button. Below the 'Add a card' button is a green box with the text 'ACH Payments or Checks' and a note: 'If you wish to opt for ACH Payments or Checks, please contact billing@docpanel.com for next steps'.

Account Information		Billing Information			
Name	TEST TEST	Address Line1	145 E 27th ST	Country	USA
Email	icetest1234@mailinator.com	Address Line2	APT 4J	State	AL
Phone	3476516503	City	New York	ZIP	10016

Clinical Manager

For case management and report retrieval

The screenshot shows the 'READY TO ASSIGN' section of the Clinical Manager. It includes a search bar with fields for Case #, MRN #, Patient Name, Study Description, and Select Modality. Below the search bar are options for 'Select Date Option' and 'Select Your Option'. A table of cases is displayed with columns for Status, Case No, MRN, Patient Name, Age, Gender, Study Date, Modality, Study Description, and No. of Radiologists. The table contains 10 rows of case data.

Status	Case No	MRN	Patient Name	Age	Gender	Study Date	Modality	Study Description	No. of Radiologists
Diagnostic	58206	8July1	8July1	59 Year s	Female	07/08/2020	MAMMO	MAMMO DIAGNOSTIC UNILAT LEFT	
Diagnostic	55390	103995	Dennis E Bitzel	66 Year s	Male	03/23/2020	CT	CT Chest/Abd/Pel W/	
Diagnostic	54891	TEST001	WALTER SHIN	35 Year s	Female	04/14/2020	MR	MRI OF THE THORACIC SPINE WITH CONTRAST ONLY	
Diagnostic	54697	MIMCLOUD_P001	PRODD001 MIMCLOUD	22 Year s	Female	04/06/2020	PET	PET/CT CUERPO	
Diagnostic	48331	Test2	2 Patient	75 Year s	Male	01/24/2020	MAMMO	Mammogram - Diag Tomo	
Diagnostic	48330	Test1	1 Patient	75 Year s	Male	01/24/2020	MAMMO	Mammogram - Tomo	
Diagnostic	47024	PLM5	PLM5	1 Year s	Male	01/21/2020	MAMMO	Mammogram - Diag Tomo	
B-Read	40065	FC2	FC2	75 Year s	Male	11/8/2019	XRAY	chest	
B-Read	40062	FC1	FC1	75 Year s	Male	11/8/2019	XRAY	chest	
Diagnostic	34708	MAMI	MAMIMAMI	-	Female	10/03/2019	MAMMO	IMPLANT SCREENING TomoHD	

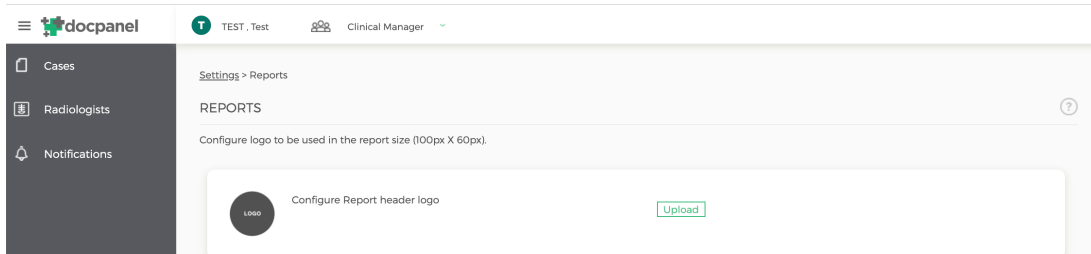
Settings

- Configure Notifications: Set up alerts via text or email

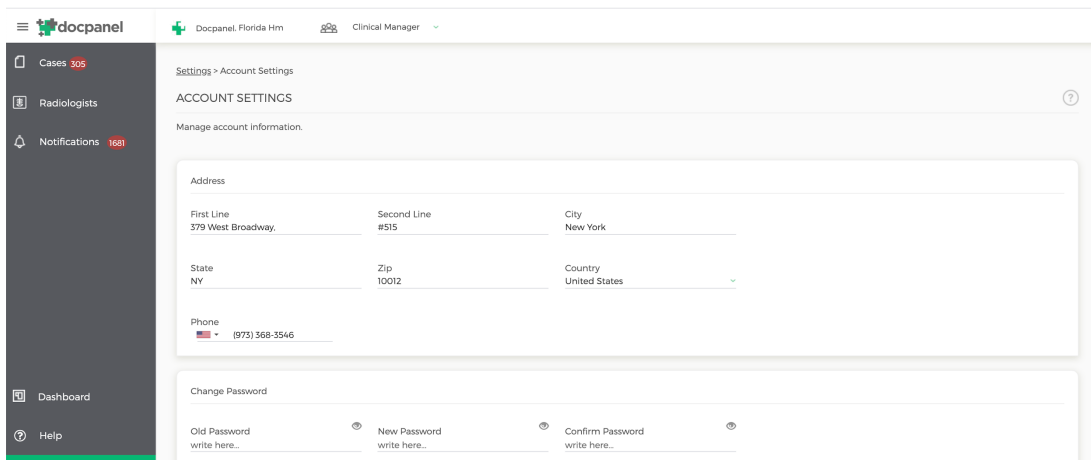
The screenshot shows the 'Settings > Notifications' page. It includes a section for 'Choose Email or Text:' with 'Text' and 'Email' buttons. Below this is a table of notification preferences for 'CASE NOTIFICATIONS' and 'ACCOUNT NOTIFICATIONS'. The 'CASE NOTIFICATIONS' section includes options for 'Uploaded', 'Not Assigned', 'Not accepted by Radiologist', 'Accepted by Radiologist', 'Notify when a case is ignored by all Radiologists', 'Declined Post Acceptance', 'Approaching Due', 'Overdue', 'Report Available', 'Comment on Case', 'Addendum Added', and 'Notify when a report approved'. The 'ACCOUNT NOTIFICATIONS' section includes 'Payment Executed'. The 'Report Available', 'Comment on Case', and 'Addendum Added' options are currently set to 'On', while others are set to 'Off'.

Notification Type	Status
Uploaded	Off
Not Assigned	Off
Not accepted by Radiologist	Off
Accepted by Radiologist	Off
Notify when a case is ignored by all Radiologists	Off
Declined Post Acceptance	Off
Approaching Due	Off
Overdue	Off
Report Available	On
Comment on Case	On
Addendum Added	On
Notify when a report approved	On
Notify when a case is ready for assignment	Off
Payment Executed	On

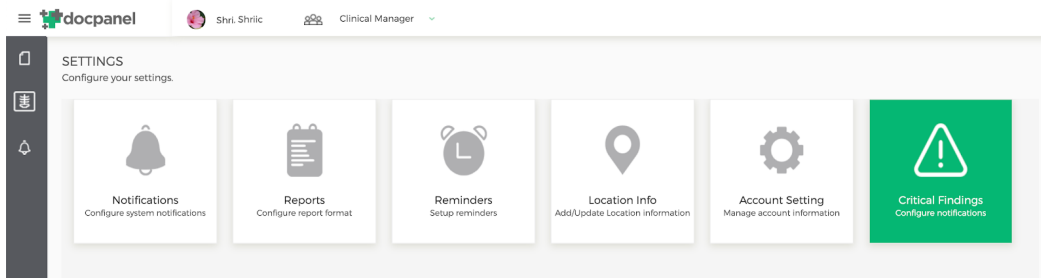
- Customize Reports: A logo can be uploaded to appear on the report header.



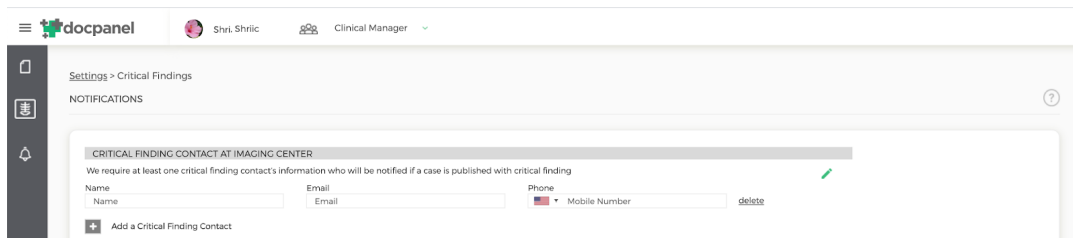
- Account Settings: [How to clear saved passwords from Google Chrome](#)
Change password by entering account information & save changes



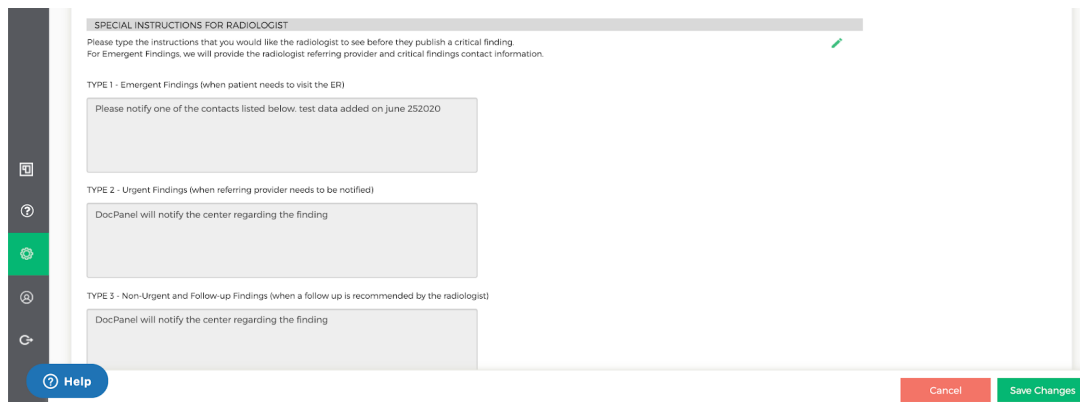
- Critical Findings: This new feature is to configure critical finding contact information and give special instructions to the radiologists



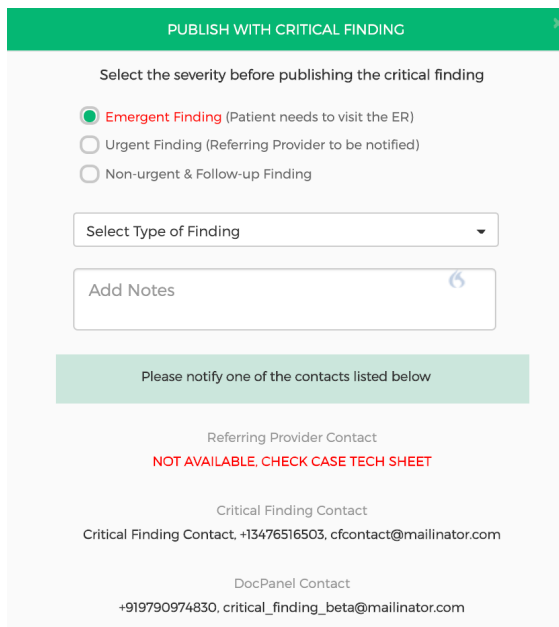
Step 1: Add a critical finding contact to this section who can be contacted when a radiologist reports a critical finding. This information will be shared with the radiologist.




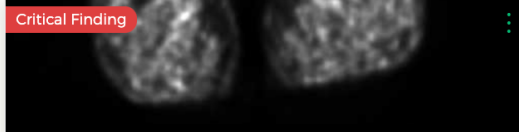
Step 2: Please include instructions for your radiologists to follow before they report a critical finding. Below is an example of instructions you could provide.



The custom instructions added in your settings page will populate for the radiologist before they report a critical finding (example shown below).



Once the case is published, it will either have a red “Critical Finding” status tag or an orange “Critical Finding Pending” status tag. If the case has a red tag, it means that the referring physician or critical finding contact has been notified and no action is required from the center’s side. If the case has an orange tag, the center is required to resolve the issue as soon as possible.

 <p>Case No. : 16510 Series(1) / Images(1)</p>	 <p>Case No. : 16486 Series(3) / Images(213)</p>
<p>29JUN7, O 29 Yrs</p> <p>CHEST Priors - No</p> <p>Final Read Date: 6/29/2020 13:28</p> <p>Shriic</p>	<p>TESTMIM2020, F 64 Yrs</p> <p>PET CT Priors - Yes</p> <p>Final Read Date: 6/29/2020 12:57</p> <p>Shriic</p>

The case can be resolved by clicking “Resolve Issue” in the actions dropdown. The action will display a pop-up requesting the center to add a message to the radiologist notifying them that the case has been resolved.

SEND NOTE TO RESOLVE ISSUE
✕

Write your note to the radiologist below

Referring Provider has received report.

Send

Cancel

CASE LIFECYCLE

Manual Upload

- Click Create Case on the bottom-right corner of the screen. A popup will appear where you can upload case images.



Insert your medical images CD into your computer now.

ImageShare

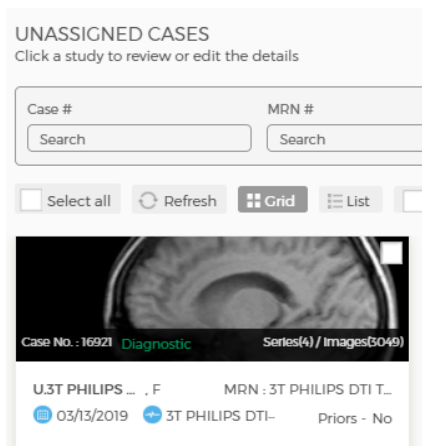
Share medical images with Location

- 1 Select your image CD or file
- 2 Upload and share your images

Choose your images

[Choose File...](#)

- Choose file(s) from your computer and click upload
- Case will appear in Unassigned tab on the top-right corner of the screen



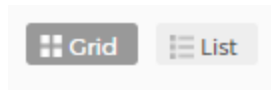
- Add Indication, any necessary paperwork and prior exams to the case
- Click Ready to Assign on the bottom-right of the screen once the case is ready

Status and Tracking Cases

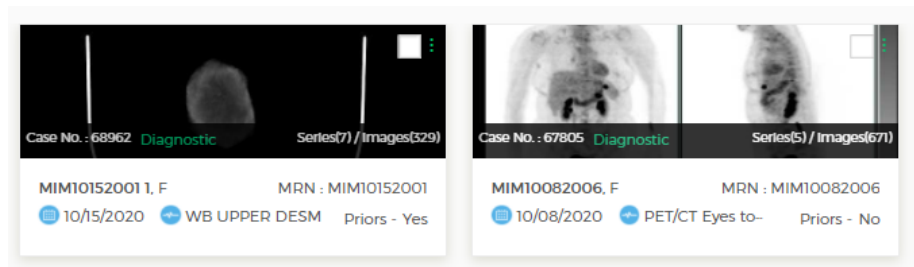
The case lifecycle is broken down into five categories

Unassigned (9) Ready to Assign (231) Posted In Progress (6) Completed (35)

Cases can be displayed in two views



Grid View displays thumbnails for easy access

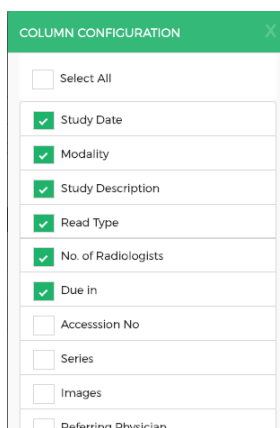


List View displays case details :

You can configure the list view based on your preferences

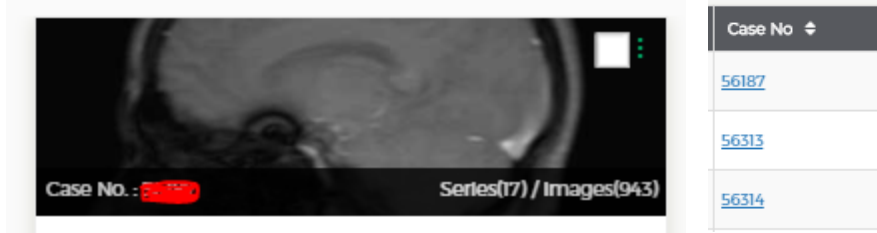
Status	Case No	MRN	Patient Name	Age	Gender	Study Date	Modality	Study Description
Diagnostic	68962	MIM10152001	MIM10152001 1	69 Years	Female	10/15/2020	PT	WB UPPER DESM
Diagnostic	67805	MIM10082006	MIM10082006	35 Years	Female	10/08/2020	PT	PET/CT Eyes to Thigh
Diagnostic	67803	MIM10082008	MIM10082008	35 Years	Female	10/08/2020	PT	PET/CT Eyes to Thigh
Diagnostic	67801	MIM10082005	MIM10082005	69 Years	Female	10/08/2020	PT	WHOLE BODY

Click the Column Configuration button, this will open a pop-up where you can select the columns you would like to see in the table and also re-order the list by dragging and dropping each item in order.

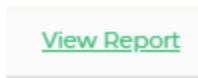


Accessing Reports

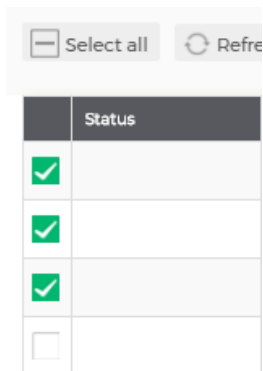
- Click the Completed tab at the top right hand corner of the screen
- Click on the case thumbnail (in grid view) or case number (in list view)



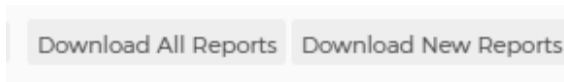
- Click the View Report hyperlink and download your report



- Downloading Multiple Reports: Select the checkboxes of cases you wish to download



- Click Download All or Download New Reports



Merge and Split Cases

We have introduced a new feature to merge and split cases on the platform. You can access it in the List View of Unassigned, Ready to Assign, Posted and In Progress state by clicking the actions button on the most-right

Status	Case No	MRN	Patient Name	Age	Gender	Study Date	Modality	Study Description	No. of Radiologists	Actions
Diagnostic	54834	TR1	TR1	55 Years	Female	04/10/2020	MR	MRI SCREENING		Unassign Case Assign Case Merge Case Split Case
B-Read Diagnostic	54009	CV1	CV1	75 Years	Male	02/19/2020	XRAY	Abdomen		
Diagnostic	53020	MR	MR	55 Years	Female	03/07/2020	MR	MRI SCREENING		
Diagnostic	48331	Test2	2 Patient	75 Years	Male	01/24/2020	MAMMO	Mammogram - Diag Tomo		

column.

Merge Cases

- After clicking on “Merge Case” from the actions drop down list, a pop-up will appear

MERGE CASE ✕

MERGE TO CASE

54009	MRN: CV1	CV1	75 Years	Abdomen	02/19/2020	Ready to Assign
-------	----------	-----	----------	---------	------------	-----------------

MRN Case No

MERGE CASES AS PRIORS

Case No.	MRN	Patient Name	Age	Study Description	Study Date	Radiologist	Status	Include
No Records Found..!								

- The pop-up allows you to search a study using MRN number or Case Number

MERGE CASE ✕

MERGE TO CASE

34699	MRN: PR2	PR2	29 Years	Kidney	08/10/2019	Unassigned
-------	----------	-----	----------	--------	------------	------------

MRN
 Case No

MERGE CASES AS PRIORS

	Case No.	MRN	Patient Name	Age	Study Description	Study Date	Radiologist	Status	Include
<input checked="" type="checkbox"/>	33781	ERA1	ERA1	29 Years	KNEE	09/25/2019		Unassigned	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/>	33783	ERA1	ERA1	29 Years	Kidney	09/25/2019		Unassigned	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

- Once the results show up, you have to select the checkbox on the left side to merge the study as a prior
- You are also given the option to include specific content from a study - the attachments, the case collaboration messages and/or the reports
- Once you have made your selections, you can complete the action by clicking the “Merge Case” button
- The new case number can be found by using the search bar

Note: You can merge multiple studies by typing the Case/MRN numbers in the search bar separated by commas (as shown above).

Split Cases

- After clicking on “Split Case” from the actions drop down list, a pop-up will appear

SPLIT CASE ✕

SPLIT FROM CASE

42885	MRN: prior	prior	1 Years	brain	12/13/2019	Unassigned
-------	------------	-------	---------	-------	------------	------------

SPLIT TO PRIMARY CASES

	Study Number	Study Description	Study Date	Status	Copy
<input type="checkbox"/>	70121	US WHOLE ABDOMEN-2D	12/13/2019	Prior	<input type="checkbox"/> <small>Text</small> <input type="checkbox"/> <small>Attachments</small> <input type="checkbox"/> <small>Messages</small>

Split Case
Cancel

- If the study has priors, they will show up in the pop-up. You can select the checkbox on the left side to split the priors to primary cases.
- You are also given the option to include specific content from the primary study - the clinical details, the attachments and/or the case collaboration messages
- Once you have made your selections, you can complete the action by clicking the “Split Case” button
- The new case(s) will be available in the “Unassigned” state and will have the “NEW” status tag for easy identification.