THE LEADING TELEMEDICINE PLATFORM FOR ROP SCREENING.

Training Manual for Phoenix CONNECT Software

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Welcome to Phoenix CONNECT!

This telemedicine Microsoft Azure cloud platform is administered by Phoenix Technical Group. Users of Phoenix CONNECT are assigned roles by their facility which allow specific access to the system as defined by the role. An overview of the roles is described below.

This user manual is divided into sections according to these user roles.

ROLES:

Upload Technician

Upload technicians are directly associated with individual clinics and this acts as a filter. Each Upload Technician can only view patients uploaded to their corresponding clinic(s). The Upload Technician/Printing Technician receives a text message on their mobile and/or an e-mail when a study has been read. They may also be assigned Administrative rights to add/remove users and receive text notifications for overdue cases.

Printing Technician

Printing Technicians are allowed to print reports for any clinic for which they have permission. They may also be assigned Administrative rights to add/remove users and receive text notifications for overdue cases.

Upload/Printing Technician

A combination of the two roles above

Reading Physicians

Reading Physicians are specialists in the field and may view and interpret images.
Reading Physicians receive a text message on their mobile phone and/or an e-mail when images have been uploaded and are ready for interpretation.

Referring Physicians

Referring Physicians can be individuals or companies and may view interpretations and patient images and download the final report in PDF format.

Administrators

There are two types of administrators.

The *Phoenix CONNECT Master Administrator* oversees and maintains the functionality, data integrity and support of the Phoenix CONNECT platform with full access to all features.

The *Phoenix Client Administrator* is able to perform subset of functions such as adding or deactivating users and clinics.

Upload Technician

Upload Technician

Overview

An important position in the ROP-Telemedicine workflow is the upload technician. Upload technicians are directly associated with individual clinics and this acts as a filter in that each Upload Technician can only view patients uploaded to their corresponding clinic(s).

The Upload Technician/Printing Technician receives a text message when a study has been read.

Phoenix CONNECT Role Features

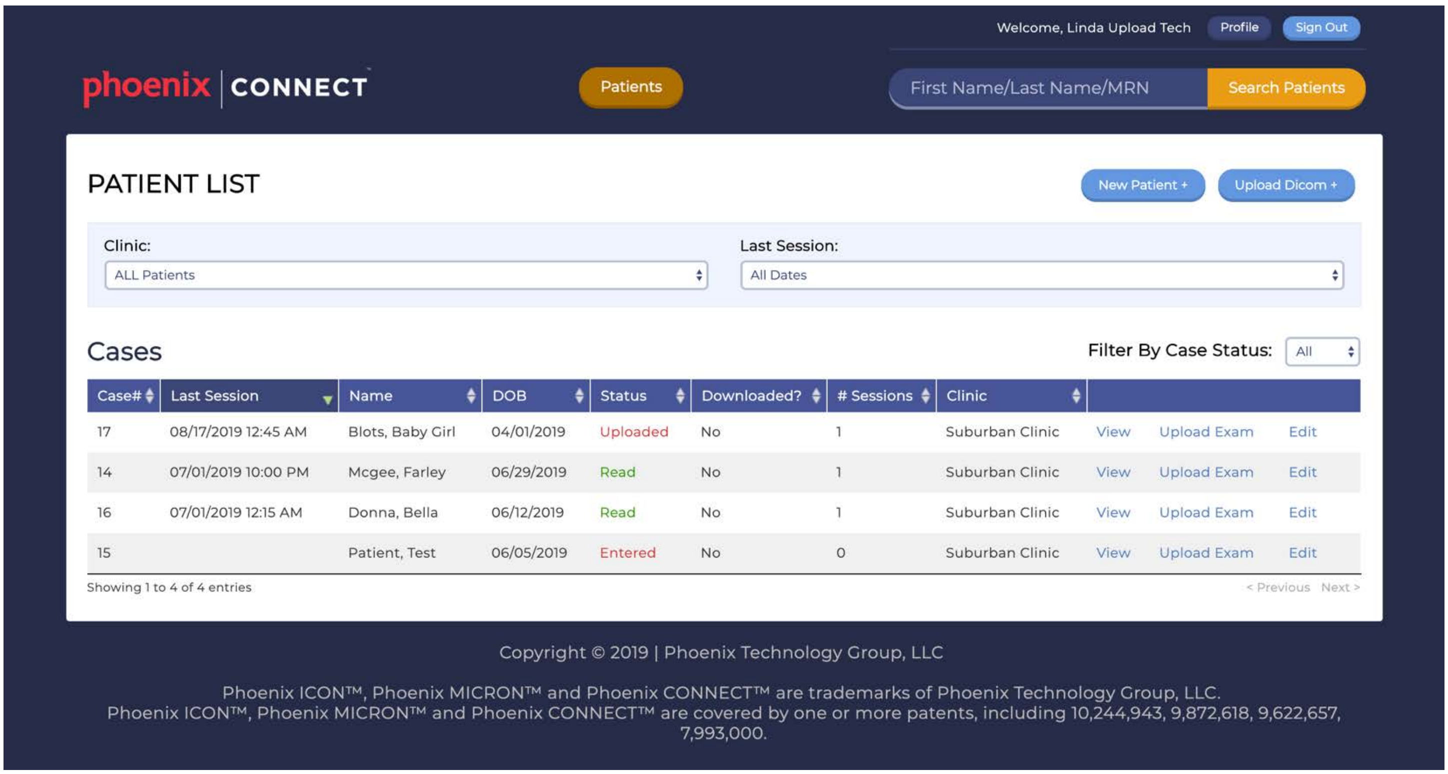
Feature	PTG Master Admin	Client Admin	Upload Tech	Reading Physician	Referring Physician	Referring Physician (upload)	Printing Tech	Upload / Printing Tech	Supervisor
See Case List	X	X	X	X	X	X	X	X	X
Edit Patient Data	X	X	X	-	-	X	X	X	-
View Patient Data	X	X	X	X	X	X	X	X	-
Upload Photo Session	X	-	X	-	-	X	-	X	-
Edit Photo Session	X	-	X	-	-	X	-	X	-
Read Photo Session	X	-	-	X	-	-	-	-	-
View Photo Session	X	-	X	X	X	X	-	X	-
View Report	X	-	-	-	-	-	X	X	-
Download Report	X	-	-	X	X	-	X	X	-
Downloading marks case as "Reviewed"	X	-	-	-	X	X	X	X	-
Add Client	X	-	-	-	-	-	-	-	-
Add Facility	X	-	-	-	-	-	-	-	-
Add Clinic	X	-	-	-	-	-	-	-	-
Edit Clinic	X	X	-	-	-	-	-	-	-
View Users	X	X	-	-	-	-	-	-	-
Add User	X	X	-	-	-	-	-	-	-
Edit User	X	X	-	-	-	-	-	-	-
Receive Text Messages	No	Yes Overdue cases (2nd time reader is reminded)	No They only upload so no report alerts	Yes When images uploaded+ up to 2 reminders	Yes When images are read)	Yes When images are read	Yes When images are read	Yes When images are read	No

Patient List Screen

When an Upload Technician logs in, the screen shall display the patient list.

The user may choose to filter the list to a specific clinic (if applicable) the default is “All Clinics.” To change this, select the clinic from the drop-down menu.

The user may also filter the list by the last session date. The default value is “All Dates.” To change this, select the date range to view from the drop-down menu (e.g. “Within One Week”). The user can also search cases by typing in a Patient’s First Name, Patient’s Last Name or Medical Record Number. The main screen looks something like this:



The patient list is broken up into two separate lists, the Incomplete Photo Sessions list and the Cases List.

Incomplete Photo Sessions List

The Incomplete Photo Sessions list displays cases for which a photo session has not been submitted. The table displays the Case Number, Session Date, Name and Clinic for the patient and a link to "Edit Photo Session." For more on editing an existing photo session see below "Editing a Photo Session."

Incomplete Photo Sessions

Case#	Session Date	Name	Clinic	
30	3/17/2014 1:00 AM	Right, Ami	Clinic1	Edit Photosession
31	3/21/2014 11:00 AM	saturday, baby	Clinic1	Edit Photosession

Showing 1 to 2 of 2 entries < Previous Next >

Cases List

The Cases list displays all cases in the selected clinic. The case list shall display the Case Number, Last Session Date, Name, Date of Birth, Status, Number of Sessions, Clinic, a View link (if images have been uploaded), an Upload Exam link, and an Edit Link.

Status descriptions include:

- **Read** cases are highlighted in green. Images have been reviewed by the physician, but a report has not been downloaded by the referring site.
- **Unread** cases are highlighted in Red. These cases have not been reported on by the physician.
- **Downloaded** refers to whether a report has been downloaded or not.
- **Uploaded** cases have had images posted to the site but have not been reviewed by the reading physician.
- **Entered** cases are patient names that have been input however no images are uploaded yet.
- **Reviewed** cases will be marked as reviewed only when a Referring Physician or Printing Technician downloads the case. Note: If the case is not downloaded in a timely fashion, it will **cause the case to become late.**

Cases

Filter By Case Status: ✓ All / Read / Unread

Case#	Last Session	Name	DOB	Status	Downloaded?	# Sessions	Clinic				
17	08/17/2019 12:45 AM	Blots, Baby Girl	04/01/2019	Uploaded	No	1	Suburban Clinic	View	Upload Exam	Edit	Report
14	07/01/2019 10:00 PM	Mcgee, Farley	06/29/2019	Reviewed	Yes	1	Suburban Clinic	View	Upload Exam	Edit	Report
16	07/01/2019 12:15 AM	Donna, Bella	06/12/2019	Read	No	1	Suburban Clinic	View	Upload Exam	Edit	Report
15		Patient, Test	06/05/2019	Entered	No	0	Suburban Clinic	View	Upload Exam	Edit	

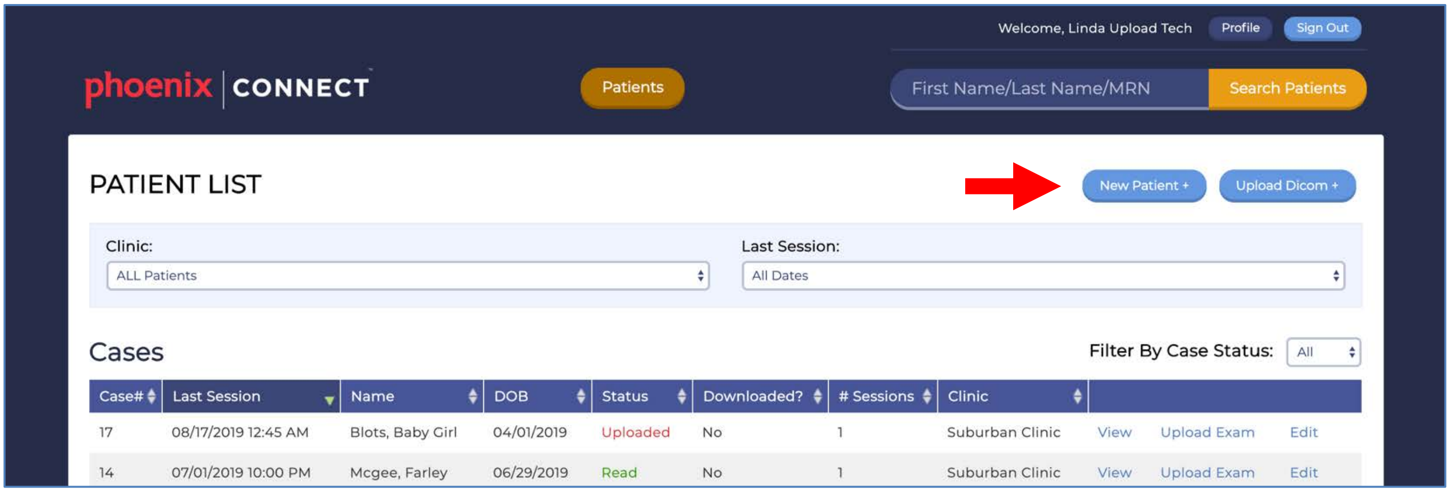
Showing 1 to 4 of 4 entries < Previous Next >

The Cases List may be filtered by choosing "Read, Unread, or All," from the Case Status drop-down menu. Selecting "Read" will show only cases which have a status of "Read" and "Reviewed". Selecting "Unread" will show only cases which have a status of "Entered" or "Uploaded". Selecting "All" will show all cases.

Create a New Patient

The most common activity for an Upload Technician is to create a New Patient for the Reading Physician to read which can be done by clicking the “New Patient” button at the top of the screen.

Clicking on this button will display the Patient Information Screen.

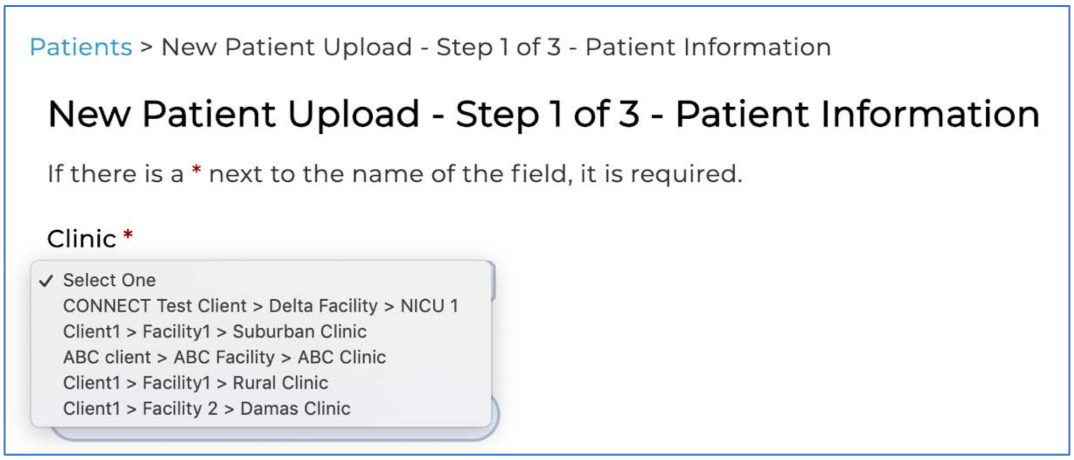


New Patient Upload

Step 1 of 3 - Patient Information Screen

Choose a Clinic

Begin by choosing a clinic from the drop down. The menu will default to the clinic to which the user is assigned.



Enter Demographic Information

Enter in required demographic information in each of the text fields for the patient. The required fields will be designated with a red *. The system will check to make sure that the entries are in the proper format.

If not, you will be notified with a message to check what you have entered.

Duplicate MRN

If you enter a patient with the same medical record number as someone else in the same clinic, you will be notified in the following manner:

The screen will list the name of the duplicate patient. You can either modify the patient's MRN by clicking "Modify MRN and Continue Adding a New Patient" or use the existing patient's record by clicking "Use [Patient Name]'s Existing Record". If you click "Modify MRN and Continue Adding a New Patient", then it will return you to the same page. If you click "Use [Patient Name]'s Existing Record", then it will bring you to the Uploading Patient Images page for that existing patient. *Do not click "Use [Patient Name]'s Existing Record" if the patient is not the same patient as it will place the photo session in the wrong patient's record.*

Duplicate Patient

If you enter a patient with the same first name, last name, date of birth, and gender as someone else in the same clinic, you will be notified in the following manner:

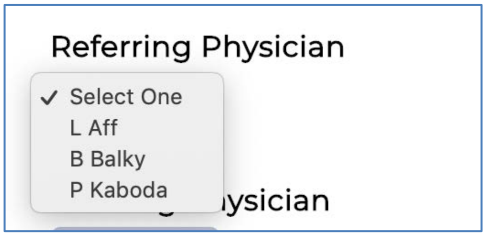
The screen will list the name of the duplicate patient. You can either modify the patient's information by clicking "Modify Demographics and Continue Adding a New Patient" or use the existing patient's record by clicking "Use [Patient Name]'s Existing Record". If you click "Modify MRN and Continue Adding a New Patient", then it will return you to the same page. If you click "Use [Patient Name]'s Existing Record", then it will bring you to the Uploading Patient Images page for that existing patient. *Do not click "Use [Patient Name]'s Existing Record" if the patient is not the same patient as it will place the photo session in the wrong patient's record.*

Choose Referring/Reading Physician

After the demographic and medical information has been entered, a Reading and

Referring Physician must be selected. Please note that Reading and Referring Physicians are ***not necessarily limited to a hospital or clinic*** so the potential Physician pool can be quite large.

Pay close attention to this part since the correct Reading Physician is very important. To select the Reading or Referring Physician, use the drop-down menu as shown:



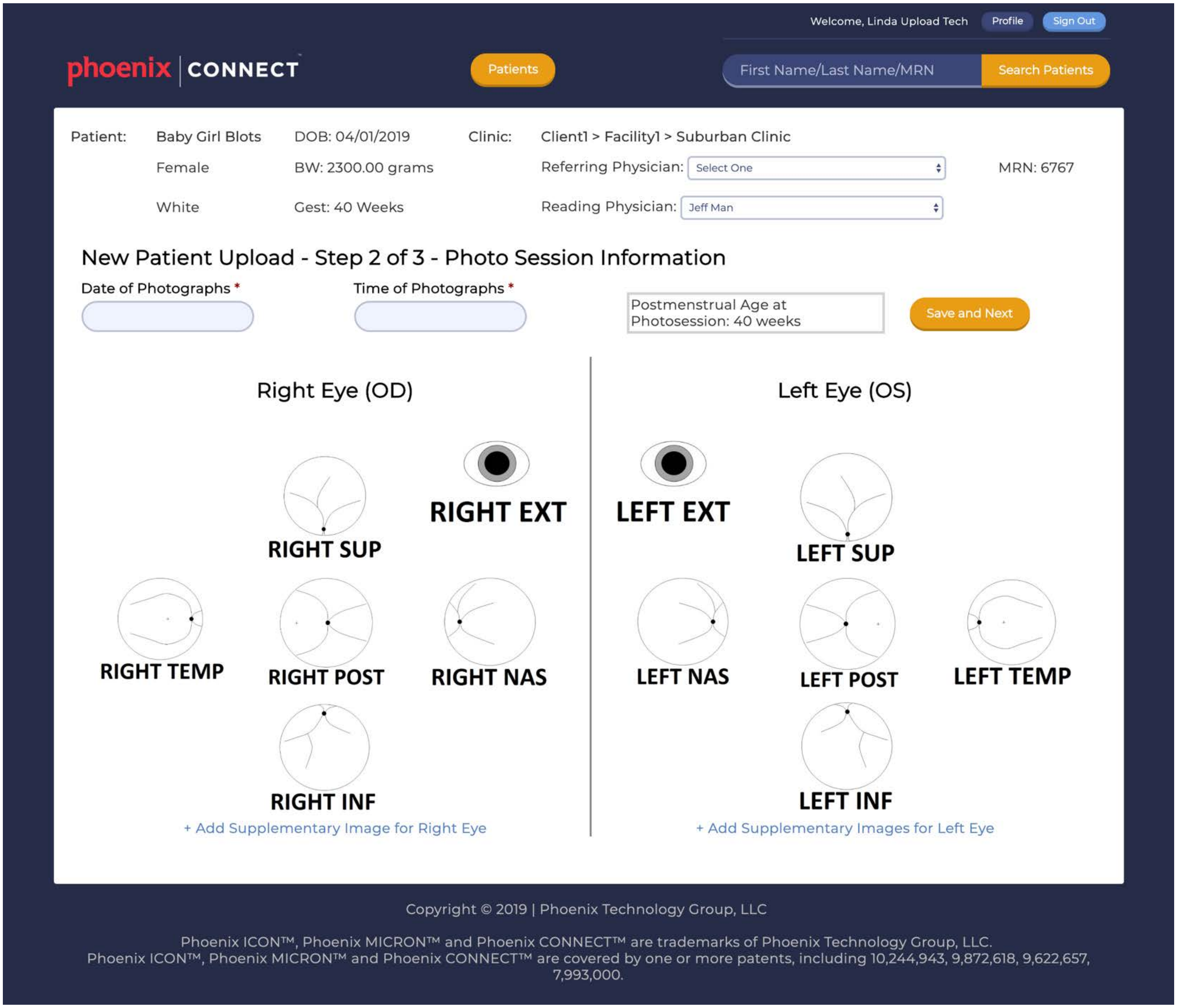
When you are finished with the Patient Information Screen, click "Save and Next."

You will be directed to begin Step 2: Uploading Patient Images.

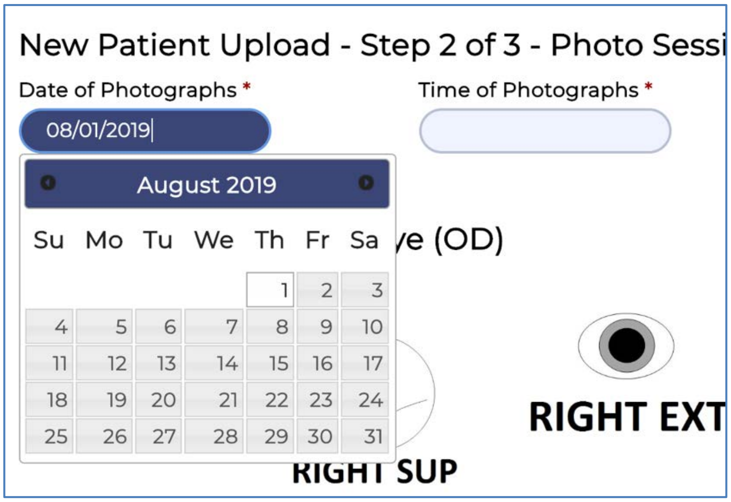
Uploading Patient Images

When you are finished entering patient demographic information, and you click "Save and Next," you will see the "Photo Session Information" screen.

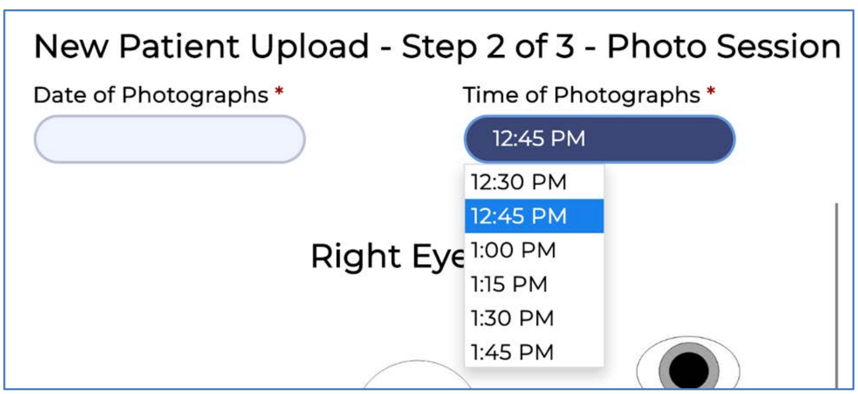
This screen will look like this:



Begin by choosing a date for the photo session from the date picker:



Select the time for the photo session to the nearest half-hour from the drop-down menu. Or enter the time manually if you desire.

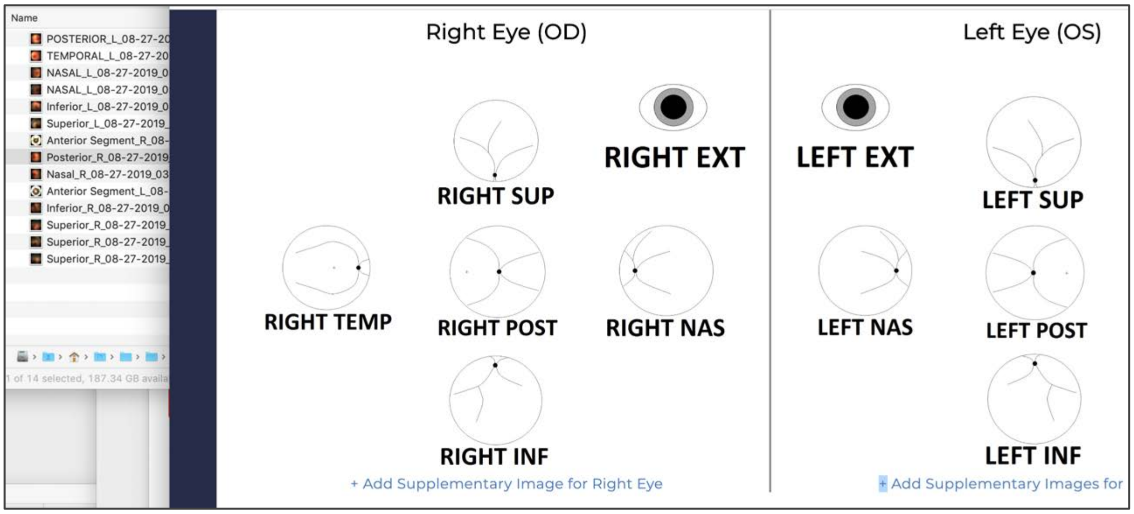


To upload images, you may do this in one of two ways: dragging and dropping images or clicking inside the image container and choosing a file from your computer.

Uploading Images: Dragging and Dropping

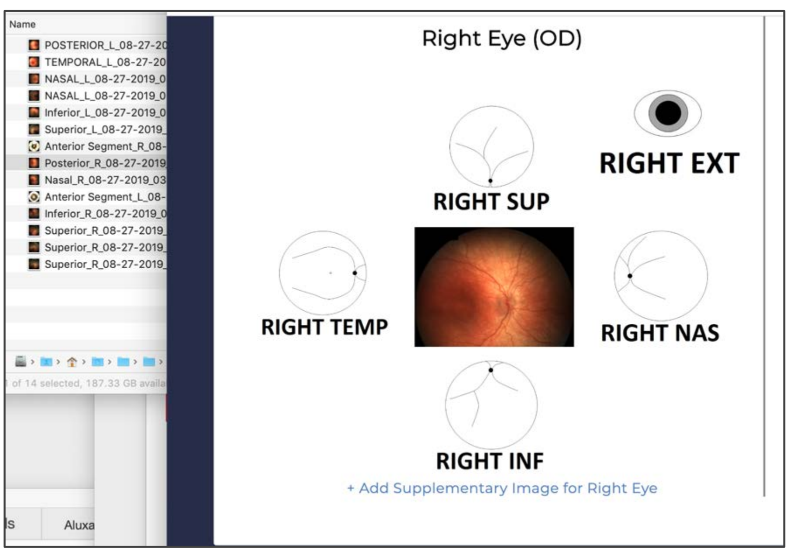
To drag and drop images, do the following:

1) Find the folder on your computer that contains the images you want. Resize the folder so that you can see the browser window.



2) Click on the thumbnail of the image you want to upload.

3) Click and drag that image into the corresponding container.



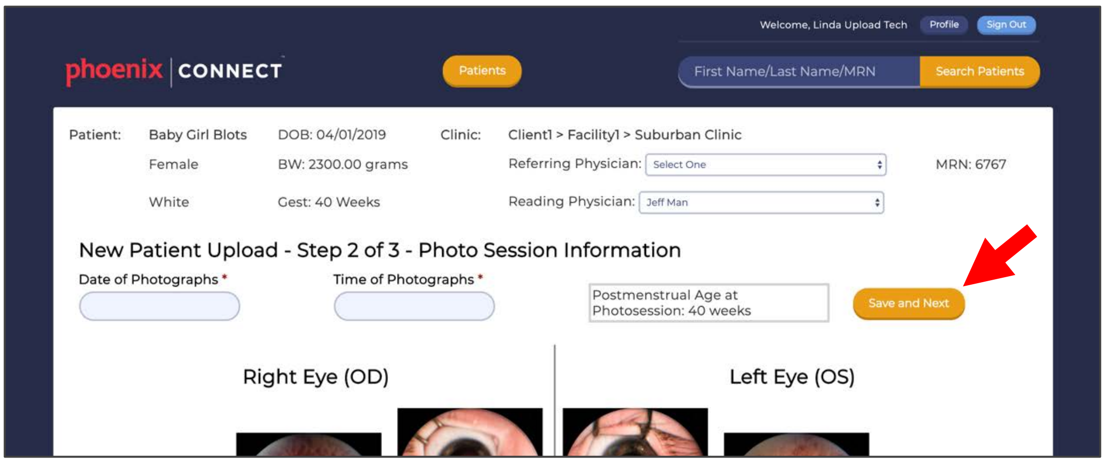
You will see it appear in the browser window. Continue the procedure with the other photos.

Uploading Images: Choosing A File on Your Computer

To upload by choosing a file on your computer, click on the image container where you would like to upload the image. A file browser will appear and allow you to choose an image from your computer.

Adding Extra Images

If you need to add extra images to give the reading physician a better view, click on the “Add Supplementary Images” link under the corresponding eye. Two new containers will appear on the screen and you can place images in them in the same ways listed above.

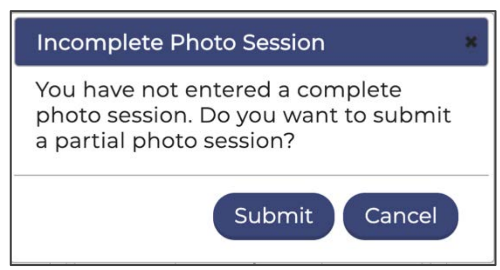


Saving Images

When you are finished uploading images, click the “Save and Next” button at the top of the page.

Uploading a Partial Session

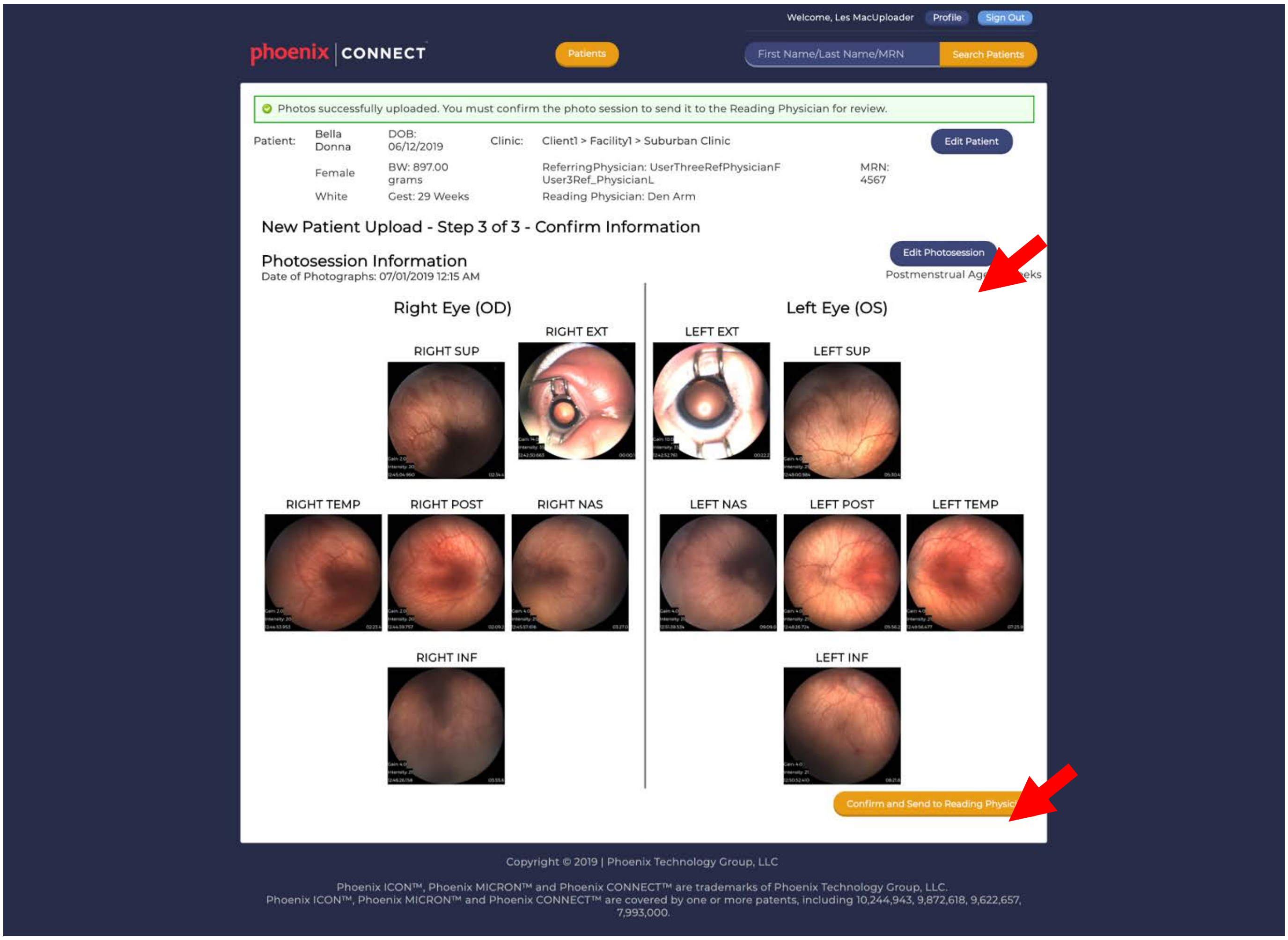
If you choose “Save and Next” and have not supplied all of the images, you will receive a warning that you are about to upload a partial session. If you intended to complete it later, click “Submit.”



Confirming Your Entries

Once you have finished uploading photos and click “Save and Next,” the system will bring you to a confirmation page where you can view all of the photos for this photo session. If they are correct, click the “Confirm and Submit to Reading Physician” button (labeled A in the diagram below).

If they are incorrect, you may edit the photo session by clicking the “Edit Photo Session” button indicated by the first arrow on the following page.



Editing a Photo Session

When you click the Edit Photo Session link from either the Patient List or the confirmation screen, the image containers shall display the images associated with them. If one of the images is incorrect you may:

1) Click on the image container that has an incorrect image. This will bring up a file browser and allow you to choose another image.

2) You may swap images on the screen by dragging and dropping them. For example, if the POST image is in the NAS container, click and drag the image in the NAS container to the POST container and the images will swap with one another.

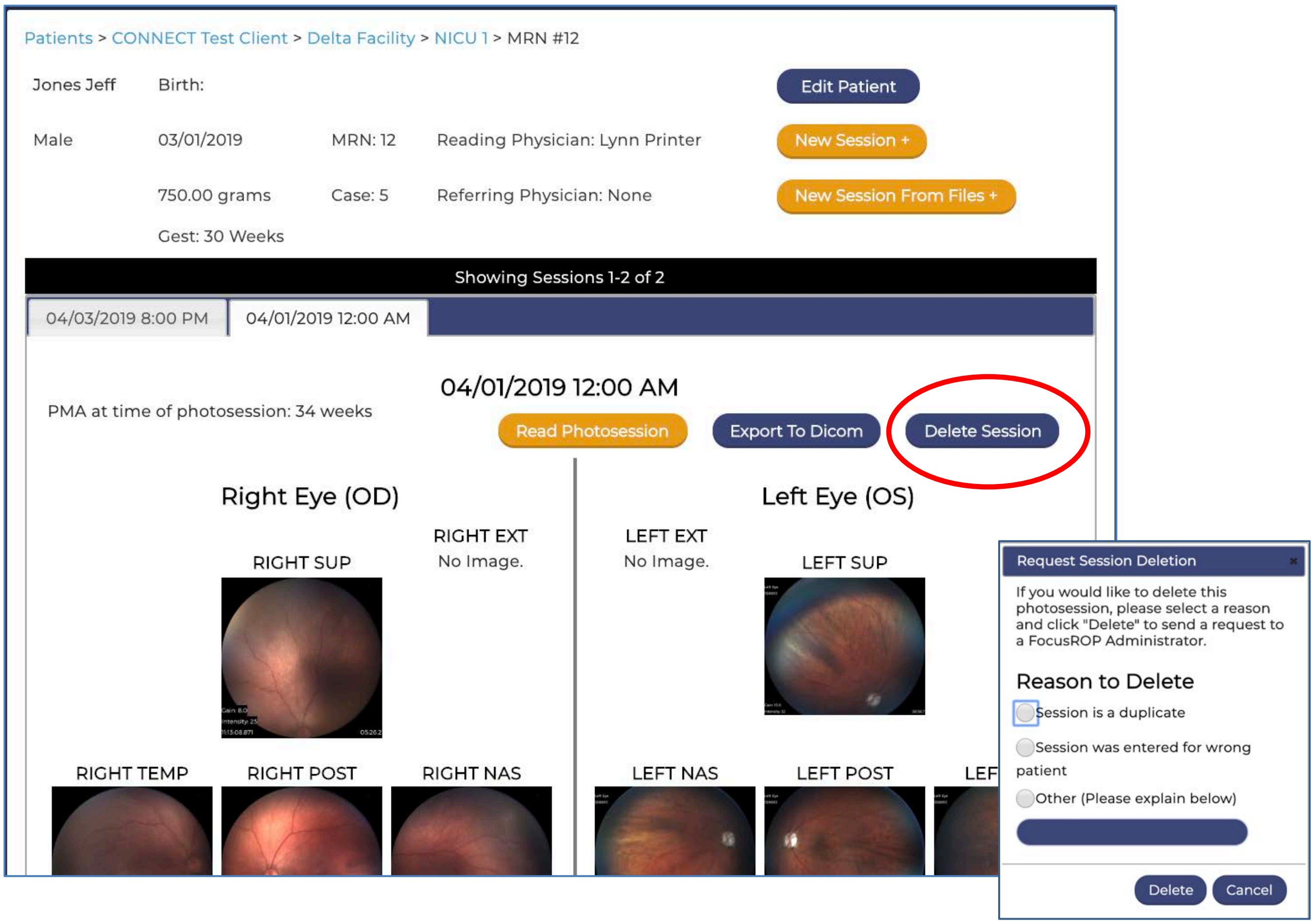
3) You may also drag an image from an incorrect container to an empty container.

When you are finished editing, Click the “Save and Next” button to save your changes.

Deleting a Photo Session

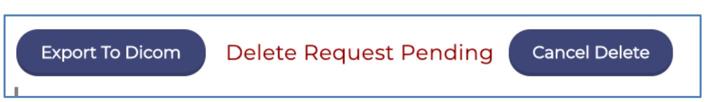
If you have uploaded a session by mistake and wish to mark a photo session for deletion, go to the Patient List, and click the “View” link.

The following will display:



Click the “Delete Session” button which will prompt you to select a reason. Select the reason from the dialog box.

Click the Delete Button. A Delete Request Pending message will display until it is approved by the Administrator.



Actions that You Can Perform from the Patient List

View a Photo Session

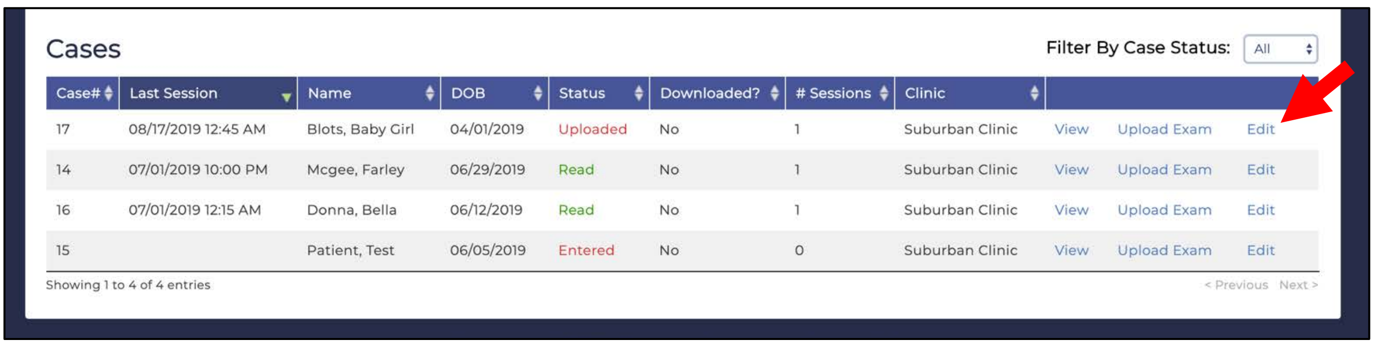
Once a photo session has been uploaded for a patient, you may click the View link to view the photo session as the Physician would see it.

Upload a New Exam

To upload a new exam for an existing patient, click the “Upload Exam” link to be brought to the page to upload a photo session. Follow the steps listed under Uploading Patient Images for more information on uploading images.

Editing Patient Information

If you need to edit an existing patient’s demographic information, go to the Patient List, find the patient whose information you need to edit and click the **Edit** link.


Cases

Filter By Case Status: All

Case#	Last Session	Name	DOB	Status	Downloaded?	# Sessions	Clinic			
17	08/17/2019 12:45 AM	Blots, Baby Girl	04/01/2019	Uploaded	No	1	Suburban Clinic	View	Upload Exam	Edit
14	07/01/2019 10:00 PM	Mcgee, Farley	06/29/2019	Read	No	1	Suburban Clinic	View	Upload Exam	Edit
16	07/01/2019 12:15 AM	Donna, Bella	06/12/2019	Read	No	1	Suburban Clinic	View	Upload Exam	Edit
15		Patient, Test	06/05/2019	Entered	No	0	Suburban Clinic	View	Upload Exam	Edit

Showing 1 to 4 of 4 entries

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This will display the Patient Information Screen again with the information that has been previously filled out. You may make the necessary changes and then click “Save”. You will be returned to the Patient List Page and notified that your changes have been saved.

Reading Physician

Reading Physician

Overview

Reading Physicians are specialists in the field and may view and interpret images.

Reading Physicians receive a text message on their mobile phone and/or email when images have been uploaded and are ready for interpretation.

Phoenix CONNECT Role Features

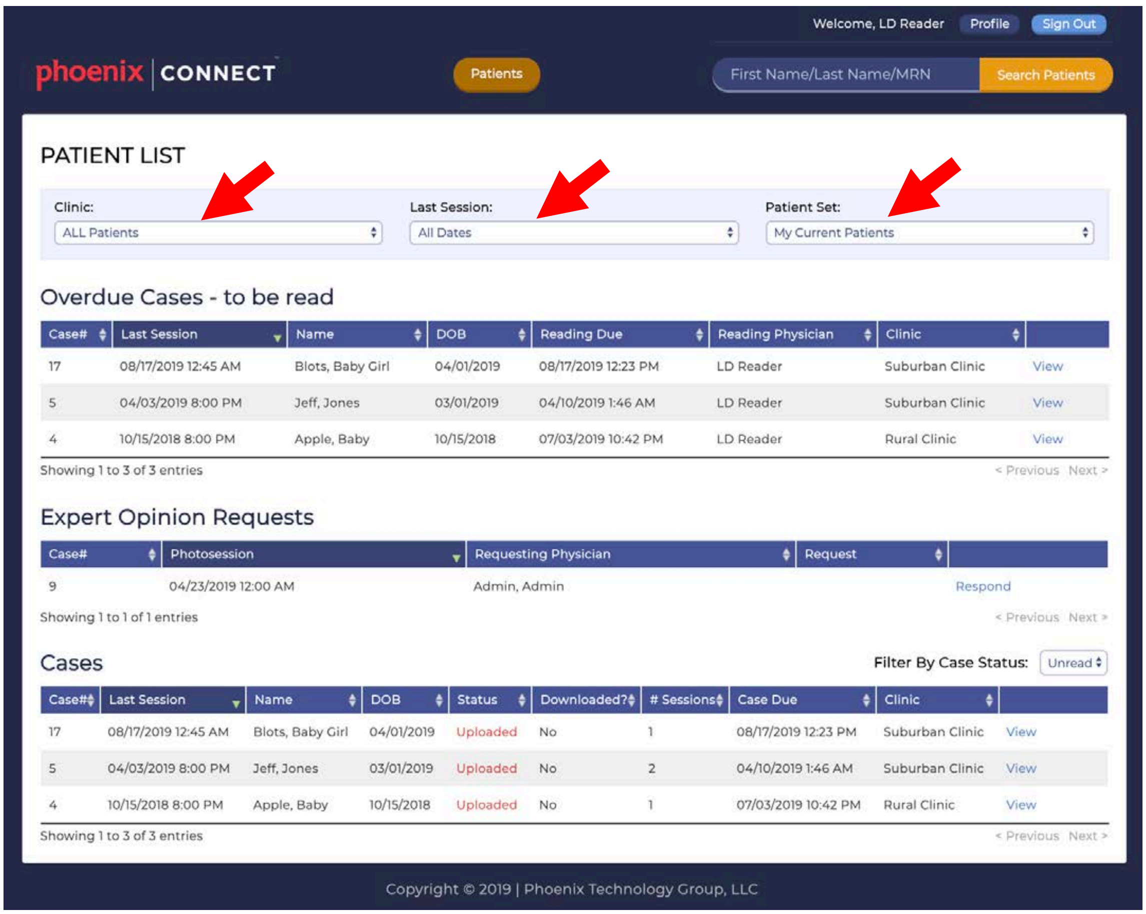
Feature	PTG Master Admin	Client Admin	Upload Tech	Reading Physician	Referring Physician	Referring Physician (upload)	Printing Tech	Upload / Printing Tech	Supervisor
See Case List	X	X	X	X	X	X	X	X	X
Edit Patient Data	X	X	X	-	-	X	X	X	-
View Patient Data	X	X	X	X	X	X	X	X	-
Upload Photo Session	X	-	X	-	-	X	-	X	-
Edit Photo Session	X	-	X	-	-	X	-	X	-
Read Photo Session	X	-	-	X	-	-	-	-	-
View Photo Session	X	-	X	X	X	X	-	X	-
View Report	X	-	-	-	-	-	X	X	-
Download Report	X	-	-	X	X	-	X	X	-
Downloading marks case as "Reviewed"	X	-	-	-	X	X	X	X	-
Add Client	X	-	-	-	-	-	-	-	-
Add Facility	X	-	-	-	-	-	-	-	-
Add Clinic	X	-	-	-	-	-	-	-	-
Edit Clinic	X	X	-	-	-	-	-	-	-
View Users	X	X	-	-	-	-	-	-	-
Add User	X	X	-	-	-	-	-	-	-
Edit User	X	X	-	-	-	-	-	-	-
Receive Text Messages	No	Yes Overdue cases (2nd time reader is reminded)	No They only upload so no report alerts	Yes when images uploaded+ up to 2 reminders	Yes When images are read (report ready for download)	Yes When images are read	Yes When images are read	Yes When images are read	No

Patient List

When a Reading Physician logs in, the screen shall display the patient list.

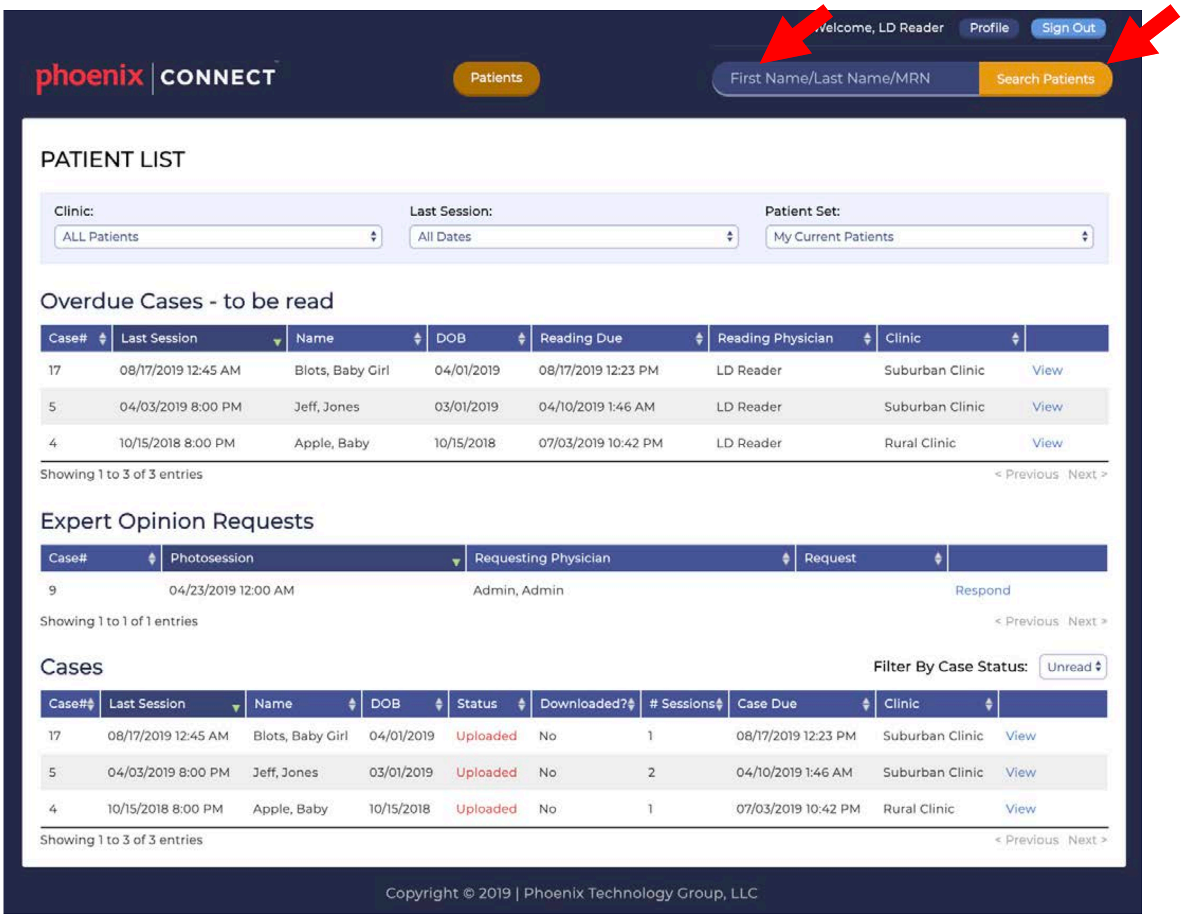
The user may choose to filter the list to a specific clinic (if applicable) the default is "All Clinics." To change this, select the clinic from the drop-down menu.

The user may also filter the list by the last session date. The default value is "All Dates." To change this, select the date range to view from the drop-down menu (e.g. "Within One Week").



The user can also search cases by typing in a Patient's First Name, Patient's Last Name or Medical Record Number.

The main screen looks something like this:



The cases are categorized according to their status.

Overdue Cases to Be Read

The Overdue Cases to Be Read list displays all of the cases that are overdue for the physician. The information for each case includes: Case Number, Last Session Date, Name, DOB, Reading Due, Reading Physician and Clinic. Each record has a view link which allows the Reading Physician to view the Case.

At the time of this writing, a case is considered Overdue at 6 hours if it has not been read.

At the time of this writing, the case may be overdue for 2 hours after which the CONNECT Administrator will be notified. This is called the Overdue Limit. (e.g. If a case is overdue at 12:50 p.m., and the overdue limit is 2 hours, the CONNECT administrator will be notified at 2:50 p.m. if the case is still overdue.)

Overdue Cases - to be read

Case#	Last Session	Name	DOB	Reading Due	Reading Physician	Clinic	
17	08/17/2019 12:45 AM	Blots, Baby Girl	04/01/2019	08/17/2019 12:23 PM	LD Reader	Suburban Clinic	View
5	04/03/2019 8:00 PM	Jeff, Jones	03/01/2019	04/10/2019 1:46 AM	LD Reader	Suburban Clinic	View
4	10/15/2018 8:00 PM	Apple, Baby	10/15/2018	07/03/2019 10:42 PM	LD Reader	Rural Clinic	View

Showing 1 to 3 of 3 entries < Previous Next >

Expert Opinion Requests

This list displays cases for which the Reading Physician has been requested to provide an expert opinion. The list displays the following: Case Number, Last Session Date, Requesting Physician and Request.

Expert Opinion Requests

Case#	Photosession	Requesting Physician	Request	
9	04/23/2019 12:00 AM	Admin, Admin		Respond

Showing 1 to 1 of 1 entries < Previous Next >

Cases List

The Cases list displays cases for which you have been assigned as the Reading Physician or you have read previously.

The case list shall display the Case Number, Last Session Date, Name, Date of Birth, Status (Read cases are highlighted in green, Unread cases are highlighted in Red), Downloaded (refers to whether a report has been downloaded or not), Number of Sessions, Case Due, Clinic, A View Link (if images have been uploaded) and a Report Link (if a report has been provided).

Cases

Filter By Case Status: Unread

Case#	Last Session	Name	DOB	Status	Downloaded?	# Sessions	Case Due	Clinic	
17	08/17/2019 12:45 AM	Blots, Baby Girl	04/01/2019	Uploaded	No	1	08/17/2019 12:23 PM	Suburban Clinic	View
5	04/03/2019 8:00 PM	Jeff, Jones	03/01/2019	Uploaded	No	2	04/10/2019 1:46 AM	Suburban Clinic	View
4	10/15/2018 8:00 PM	Apple, Baby	10/15/2018	Uploaded	No	1	07/03/2019 10:42 PM	Rural Clinic	View

Showing 1 to 3 of 3 entries < Previous Next >

The cases list may be filtered by choosing “Read, Unread, or All,” from the Case Status drop-down menu. Selecting “Read” will show only cases which have a status of “Read” and “Reviewed”. Selecting “Unread” will show only cases which have a status of “Entered” or “Uploaded”. Selecting “All” will show all cases.

Cases

Filter By Case Status: All / Read / Unread

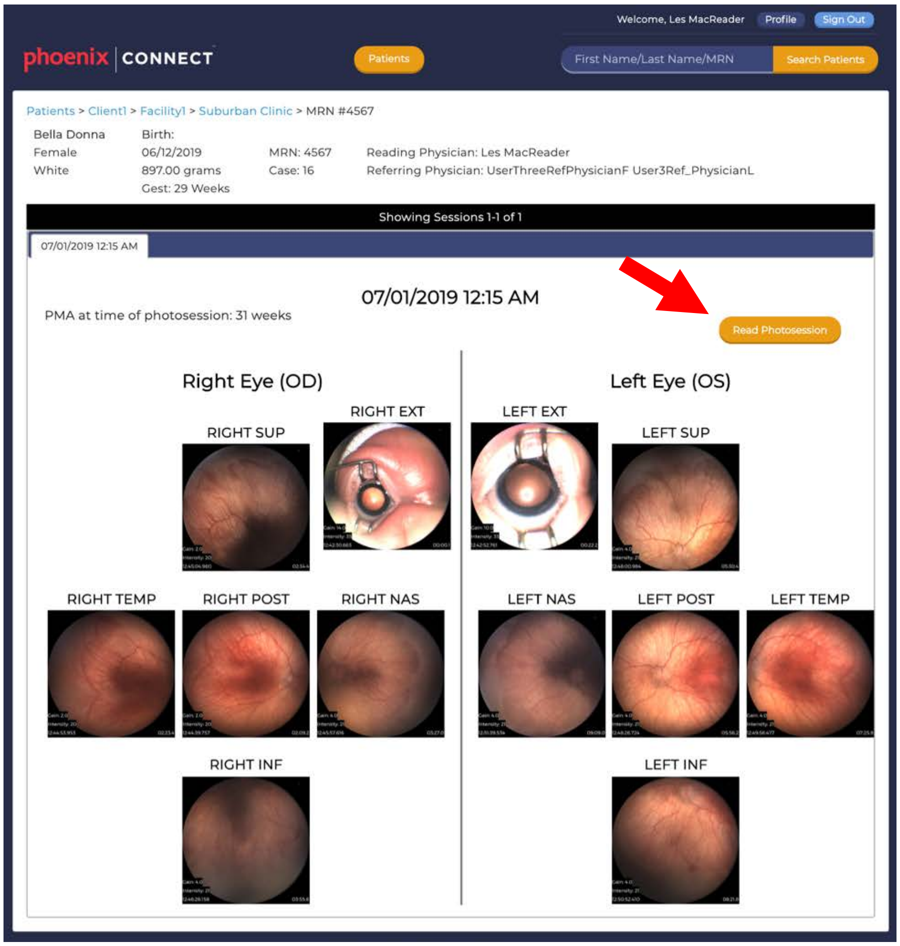
Case#	Last Session	Name	DOB	Status	Downloaded?	# Sessions	Case Due	Clinic	
17	08/17/2019 12:45 AM	Blots, Baby Girl	04/01/2019	Read	No	1	09/10/2019 6:12 PM	Suburban Clinic	View
16	07/01/2019 12:15 AM	Donna, Bella	06/12/2019	Read	No	1	07/20/2019 5:30 AM	Suburban Clinic	View
5	04/03/2019 8:00 PM	Jeff, Jones	03/01/2019	Uploaded	No	2	04/10/2019 1:46 AM	Suburban Clinic	View
3	04/01/2019 12:15 AM	Test-A, Baby	04/01/2019	Read	No	1	05/29/2019 3:10 PM	Suburban Clinic	View
4	10/15/2018 8:00 PM	Apple, Baby	10/15/2018	Uploaded	No	1	07/03/2019 10:42 PM	Rural Clinic	View

Showing 1 to 5 of 5 entries < Previous Next >

Reading a Case

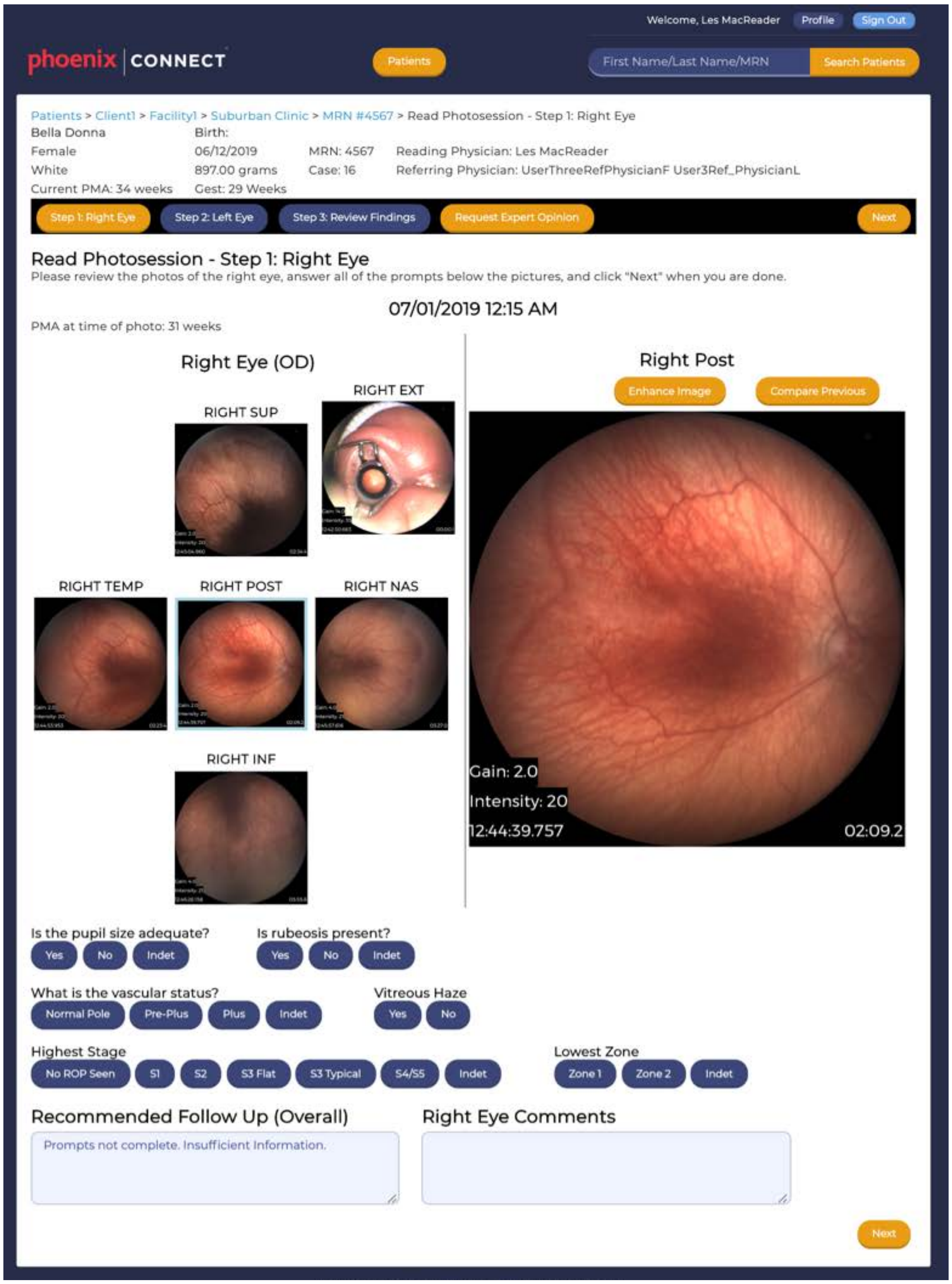
The Reading Physician will click the "View" Link which will display the Patient Details page.

The most recent unread photo session shall be displayed first. To begin a Reading, click the "Read Photosession" button in the upper right corner.

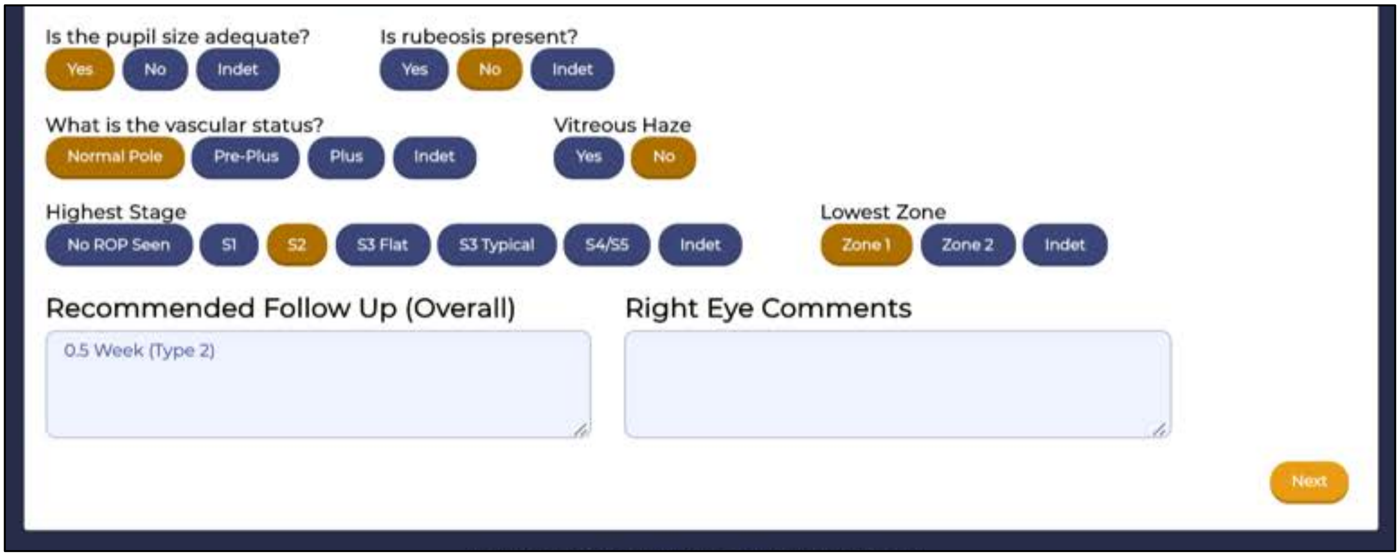


The images that correspond with the Right Eye are shown first. On the left-hand side of the screen are thumbnail images. On the right-hand side of the screen, a larger version of the highlighted image appears.

You may click on the thumbnails you wish to view. Alternatively, you may click through them by hovering over the larger image with the mouse and clicking on the left arrow to go to the previous image, or the right arrow to move to the next image.



Answer the prompts below the images by clicking on the corresponding buttons as shown. For example: What is the Pole status?



Make sure you answer all prompts before you continue.

To continue reading the left eye, click the “Next” button at the bottom of the screen or the “Step 2: Left Eye” button at the top of the screen.

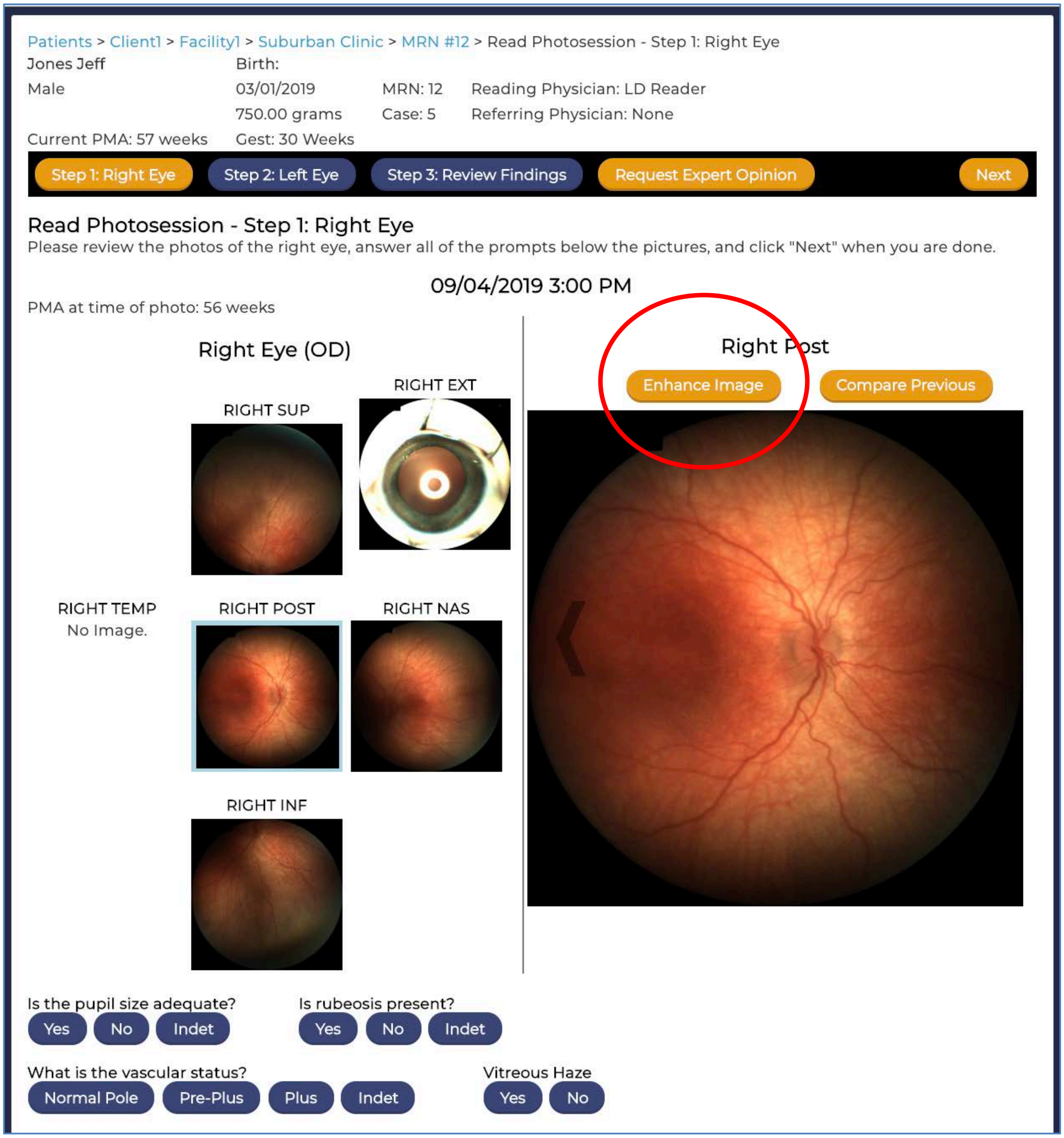
Reading the left eye is performed in a similar fashion to reading the right eye. When finished, click the “Next” button at the bottom or click “Step 3: Review Findings”.

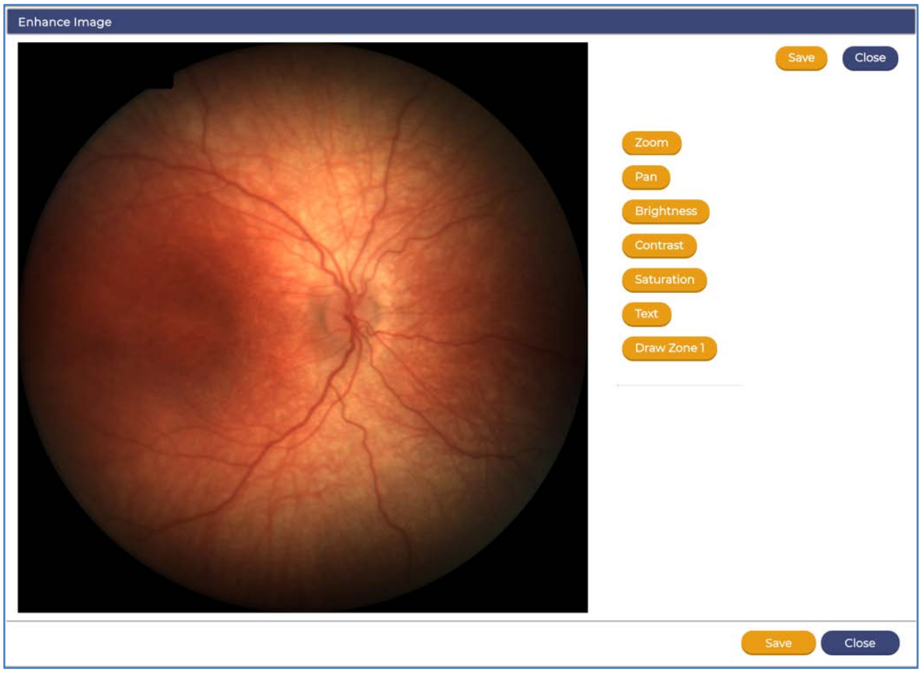
While reviewing a case, the following tools may be helpful to you:

Enhancing Images

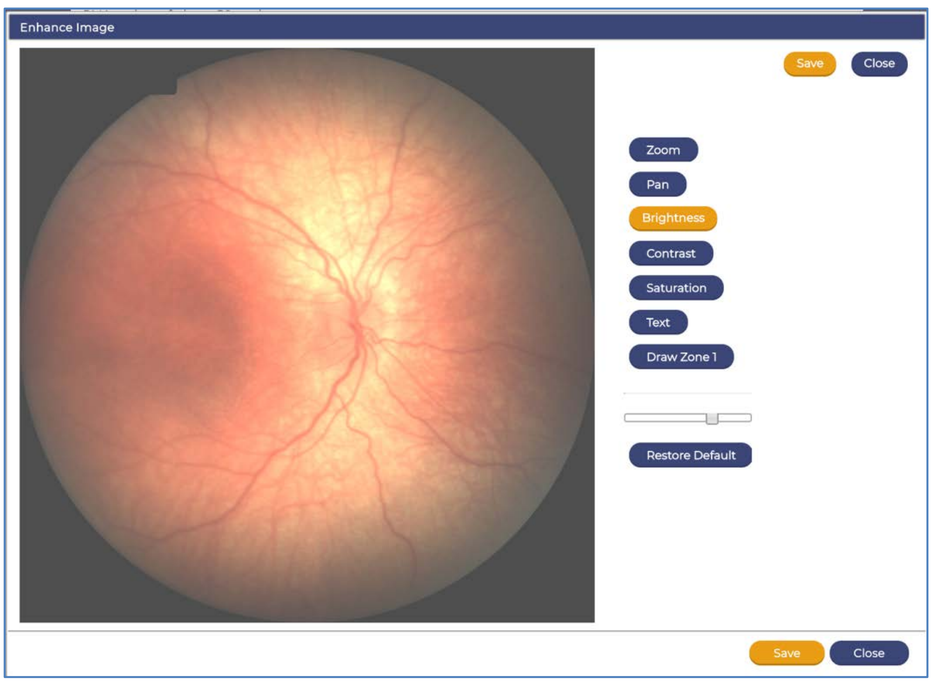
If you find you need to enhance an image to get a clearer view, click the "Enhance Image" button above a given image.

Doing so will bring up an image editing panel.

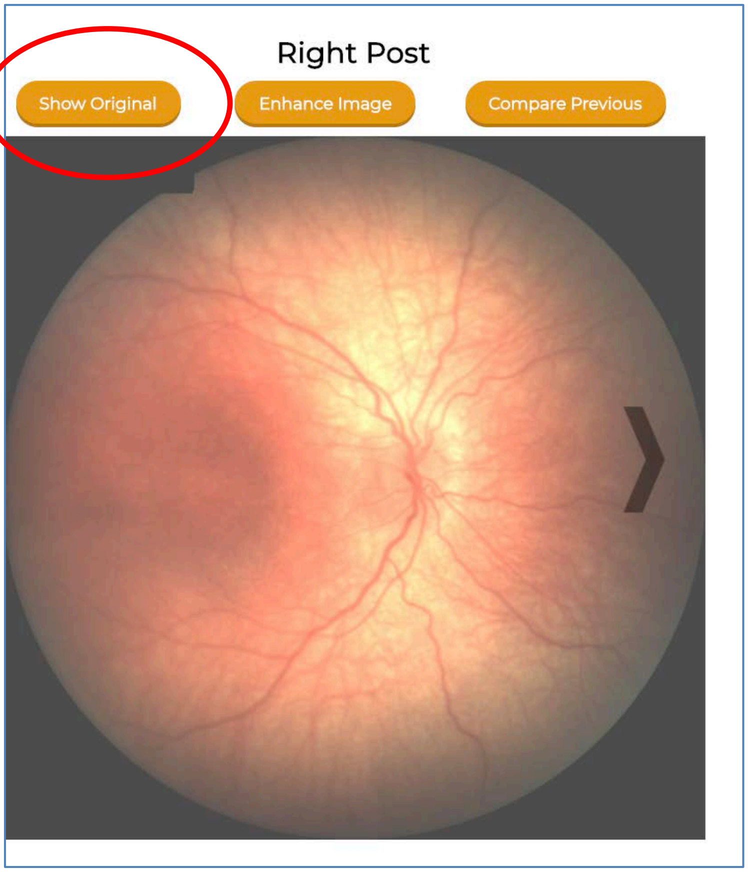




Click the button for the type of adjustment you wish to make (e.g. Brightness).



Adjust the slider as necessary. After you have made the appropriate adjustment, you may click another type of image enhancement and adjust that. After you have made all of your adjustments, click the Save button. Your image will now appear in the appropriate container on the previous page.

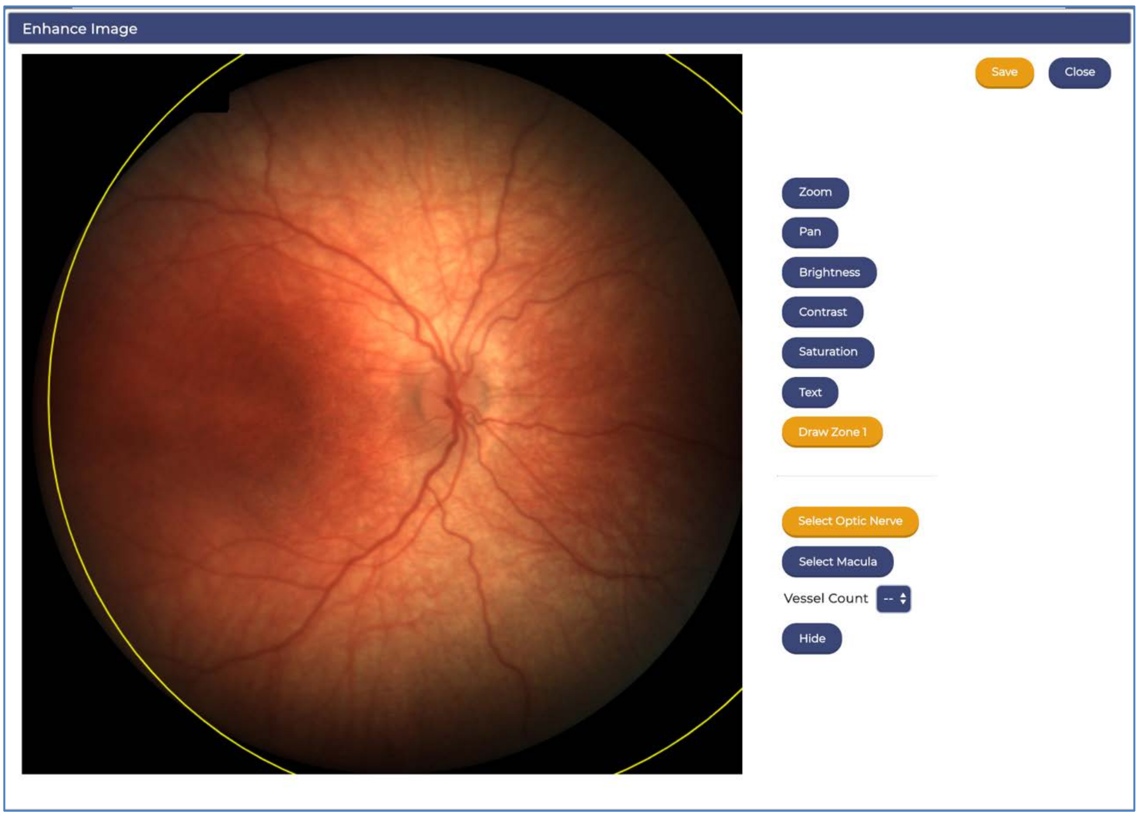


At any time you may choose to view the original image by clicking on the container with the enhanced image and clicking the “Show Original” button.

Draw Zone 1

One of the options in the enhance image panel is to Draw Zone 1. To do so:

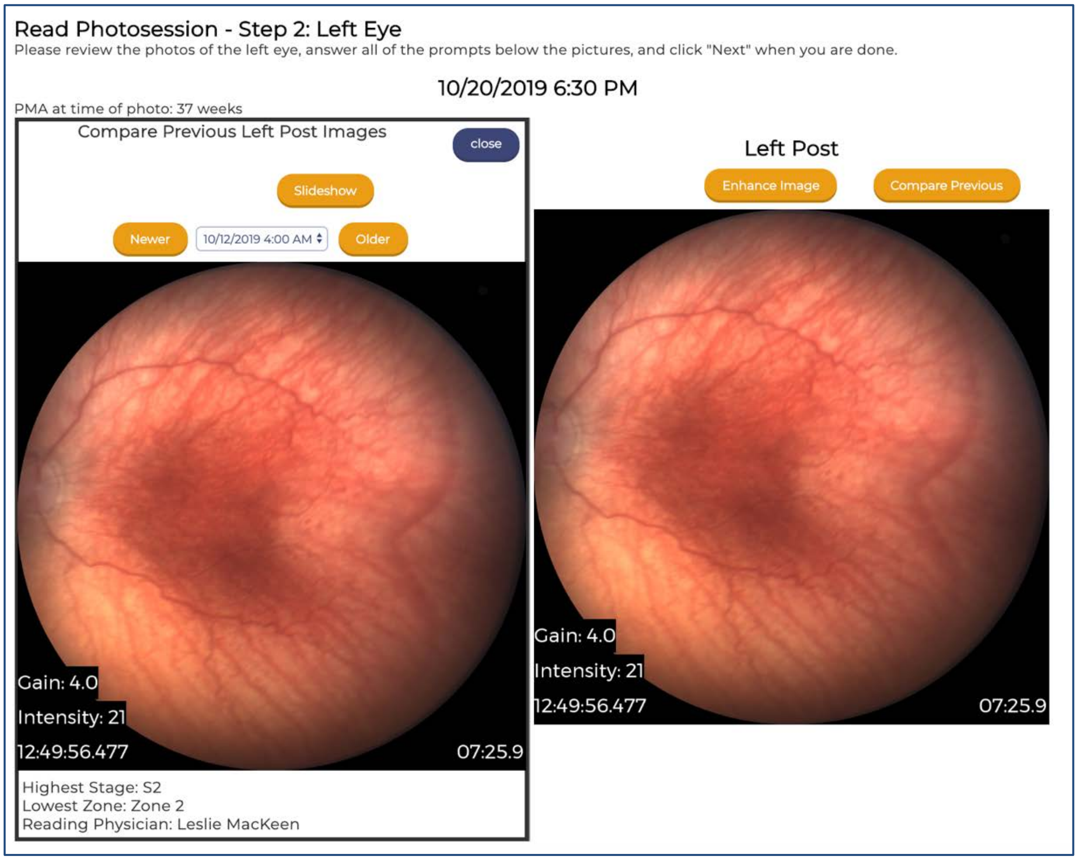
1) Click “Draw Zone 1”
2) “Select Optic Nerve” will be highlighted. Click on the image over the optic nerve.
3) “Select Macula” will be highlighted. Click on the image over the macula.
4) The system will draw a circle corresponding to Zone 1 in yellow.
5) Choose “Save” to save the image which will replace the current thumbnail.



Comparing Previous Images

If you would like to compare the current image to a previous image, click the "Compare Previous" button. It will launch a window on the left-hand size which shall display the most recent previous image.

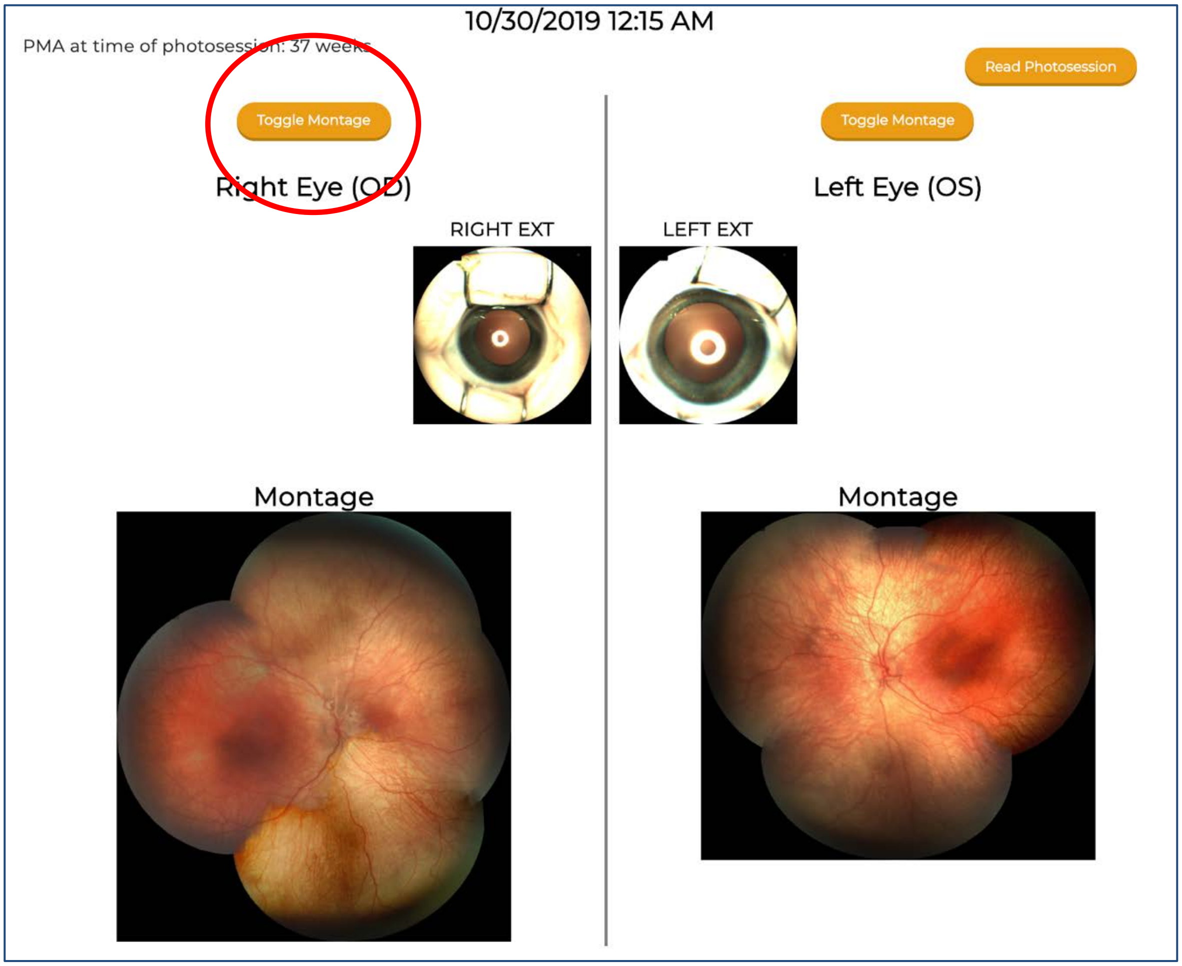
You may view earlier images (if available) by clicking the "Newer" and "Older" buttons. You may also choose a specific date from the drop-down box.



Viewing Montaged Images

The system will automatically montage the SUP, POST, NAS, TEMP and INF images for each eye when possible. To view the montaged images, click the “Toggle Montage” button.

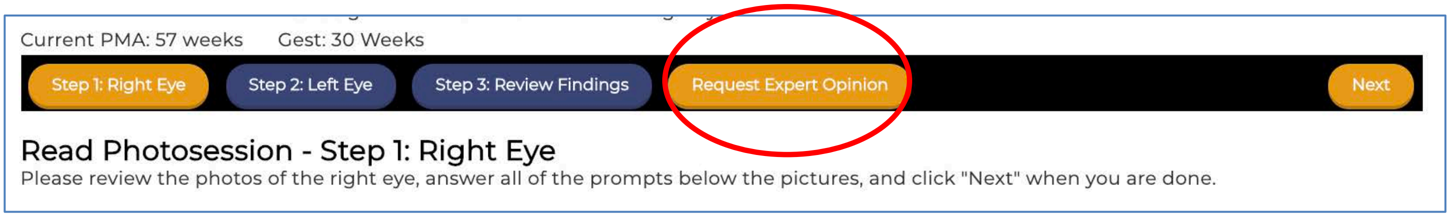
It will display the montage in place of the thumbnails as shown:



Click the “Toggle Montage” button a second time to turn the montage off.

Request Second Opinion

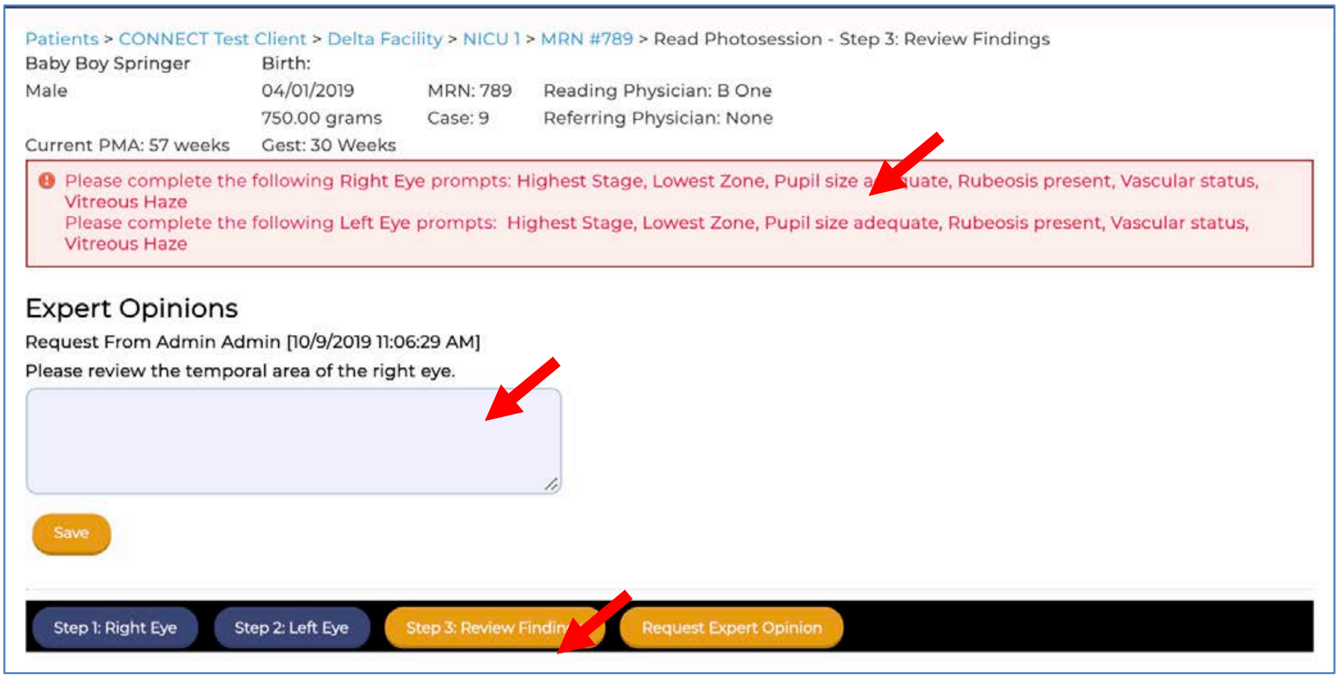
If in the course of your review, you wish to get a second opinion on an image or set of images, click on the “Request Expert Opinion” button. This will launch a second opinion window.



Select the name of another Reading Physician whose opinion you would like to receive from the drop-down menu.

Type a message to the other physician and click “Add.”

You will see the message you typed to the other physician appear on the Review Findings screen. Their answer will appear below. Before they have answered the message: “Response from [Other Physician] still pending” will appear instead.



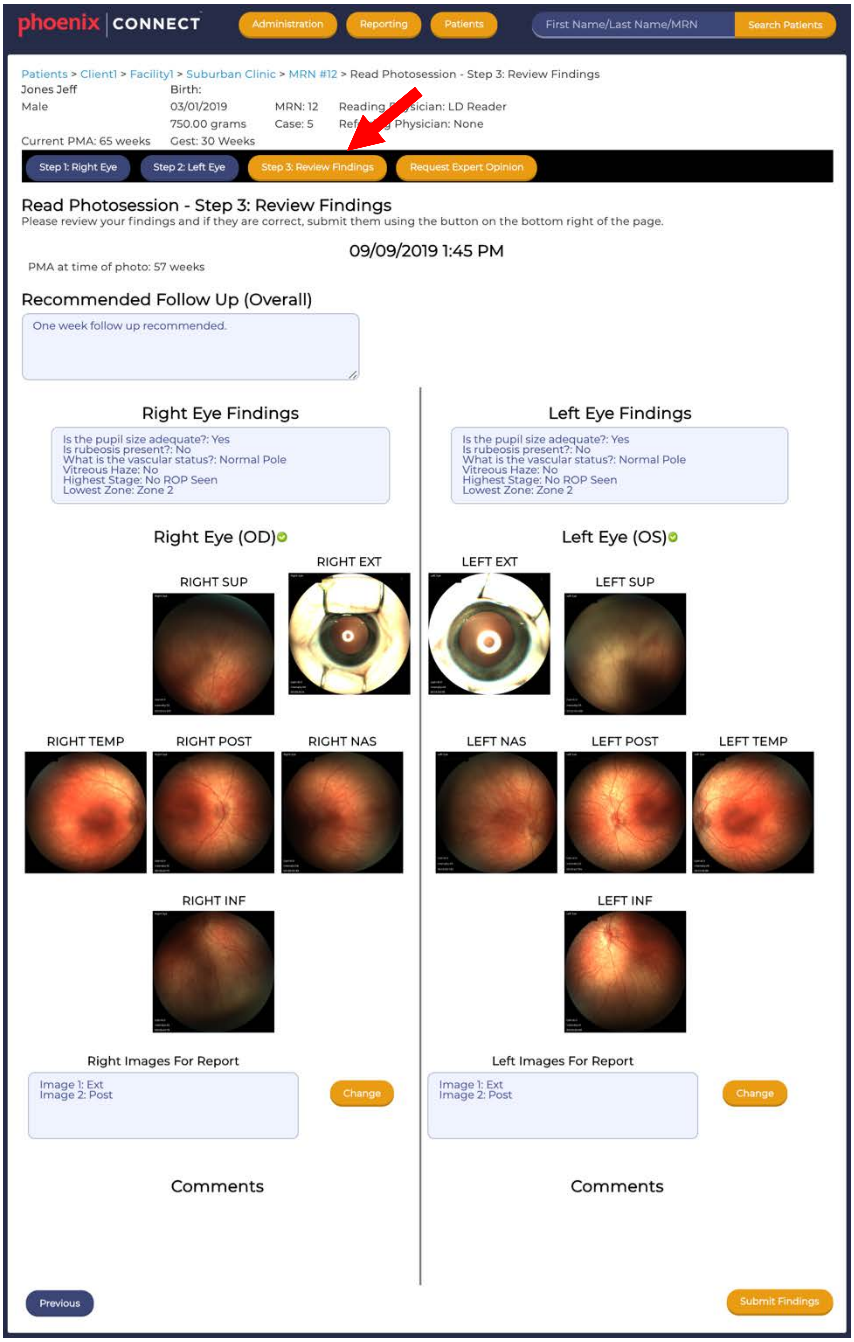
Reviewing Findings

The Review Findings screen allows you to verify that the reading has been completed correctly. If there are any prompts that have not been answered, you will receive an alert at the top of the screen to go back and check them.

You should check the findings boxes for each eye to make sure they are accurate. If not, you may change them by changing the reading in the following way:

1) Click on the appropriate button “Step 1: Right Eye” or “Step 2: Left Eye” to return to the screen
2) Make the necessary changes to the prompts.
3) Click “Save”. The findings boxes on the Review Findings screen will change accordingly.

Whatever appears on the Review Findings screen in the Findings boxes is what will appear on the report.



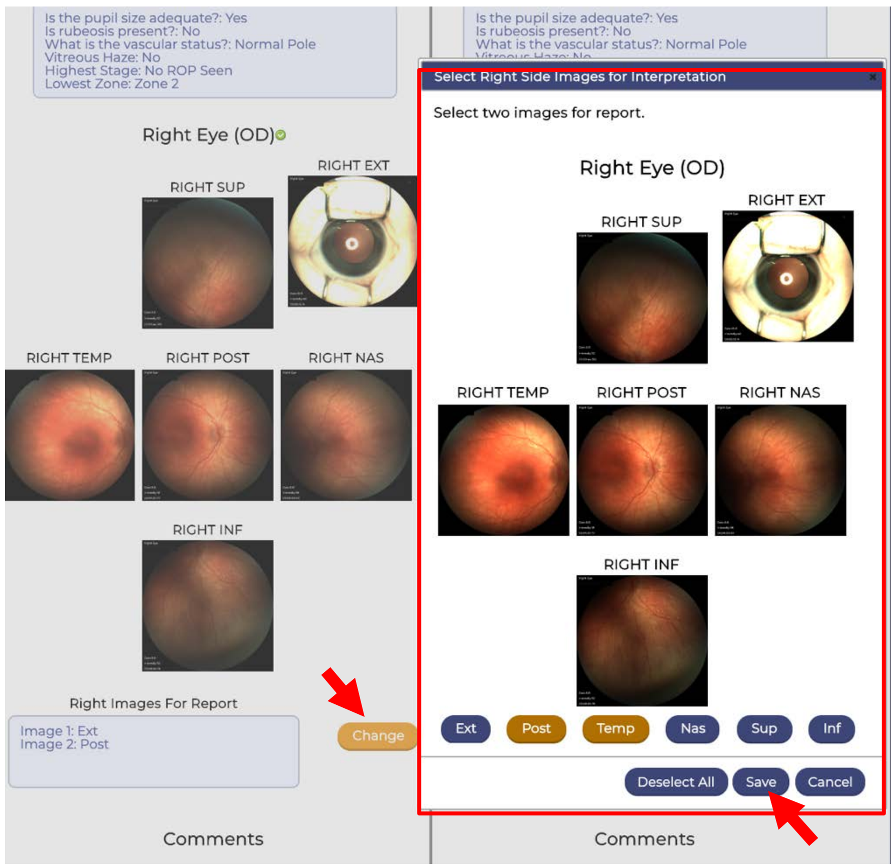
Change Images for Report

Also, while Reviewing Findings, you may choose which images will appear on the report. By default, the EXT and POST images appear on the report for each eye.

To change the images, click on the "Change" button next to the "Images for Report" box under the eye you wish to change.

Click the buttons or the thumbnails corresponding to the images you wish to include.

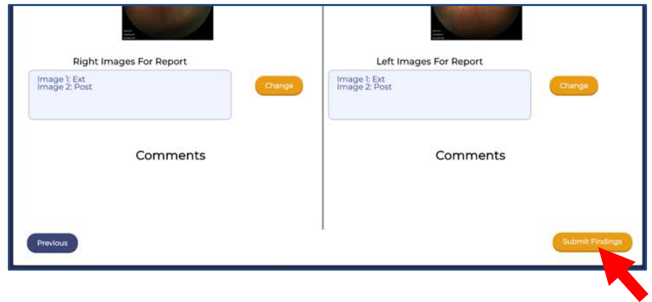
When you are satisfied with your choices, click "Save."



Submitting Your Reading

To submit your reading, click the “Submit Findings” button.

Once you have submitted your findings, they will be stored in the database and the record will change to “Read” status.

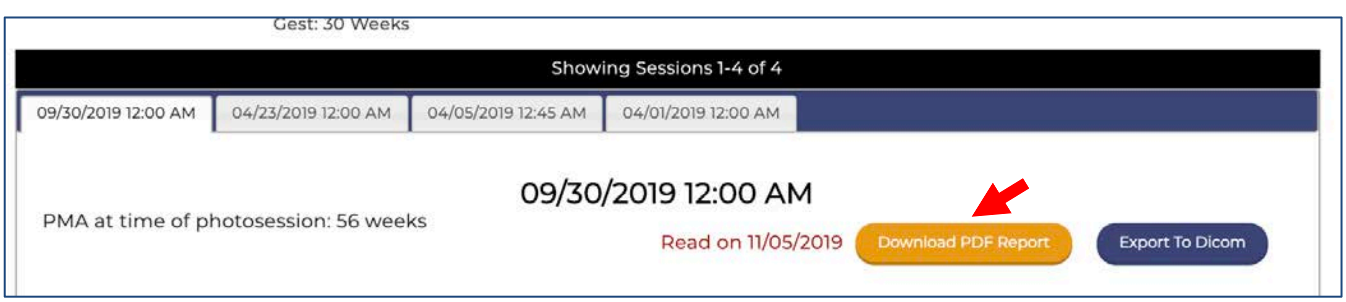


Case#	Last Session	Name	DOB	Status	Downloaded?	# Sessions	Case Due	Clinic				
9	09/30/2019 12:00 AM	Springer, Baby Boy	04/01/2019	Entered	No	4	10/09/2019 4:56 PM	NICU 1	View	Upload Exam	Edit	Report
5	09/09/2019 1:45 PM	Jeff, Jones	03/01/2019	Uploaded	No	4	10/10/2019 2:04 AM	Suburban Clinic	View	Upload Exam	Edit	Report
17	08/17/2019 12:45 AM	Blots, Baby Girl	04/01/2019	Read	No	1	09/10/2019 6:12 PM	Suburban Clinic	View	Upload Exam	Edit	Report
12	07/08/2019 4:45 AM	Monday, Baby Girl	04/01/2019	Uploaded	No	3	07/12/2019 7:14 PM	NICU 1	View	Upload Exam	Edit	Report
14	07/01/2019 10:00 PM	Mcgee, Farley	06/29/2019	Reviewed	Yes	1	07/11/2019 7:43 PM	Suburban Clinic	View	Upload Exam	Edit	Report
16	07/01/2019 12:15 AM	Donna, Bella	06/12/2019	Read	No	1	07/20/2019 5:30 AM	Suburban Clinic	View	Upload Exam	Edit	Report
11	05/06/2019 1:15 AM	Morning, Monday	04/01/2019	Read	No	1	05/06/2019 5:31 PM	Suburban Clinic	View	Upload Exam	Edit	Report

You will return to the Patient Details page where you can see all of the photo sessions for a patient. The most recent one will be on top marked with a “Read On: [Date].”

Downloading a Report

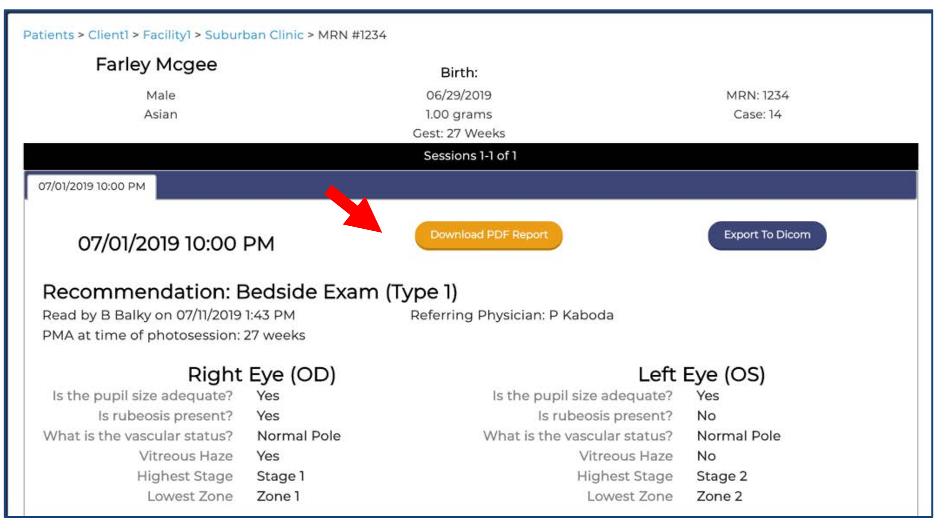
To download a report, click the “Download PDF” button on the Patient Details page to download a copy of the report to your computer.



You may also download the report by going to the Patient List. It is easier to find the case if you filter the Patient List by "Read" cases by choosing "Read" in the drop-down.

Then click the "Report" link for the patient whose report you wish to view. This will display the Interpretation page.

To download the report, click the "Download PDF" button.



Printing Your Report

You may print a copy of your report once it has been downloaded by printing the PDF file.

Important: Please note that your action of downloading the case will not mark the case as "Reviewed" in the database. That will only happen when a Referring Physician or Printing Technician downloads the case.

Please note: to download a previously filed report, click on the tab corresponding to the date of the report you wish to print and follow the instructions above.

Referring Physician

Referring Physicians

Referring Physicians can be individuals or companies and may view interpretations and patient images and download the final report in PDF format.

Phoenix CONNECT Role Features

Feature	PTG Master Admin	Client Admin	Upload Tech	Reading Physician	Referring Physician	Referring Physician (upload)	Printing Tech	Upload / Printing Tech	Supervisor
See Case List	X	X	X	X	X	X	X	X	X
Edit Patient Data	X	X	X	-	-	X	X	X	-
View Patient Data	X	X	X	X	X	X	X	X	-
Upload Photo Session	X	-	X	-	-	X	-	X	-
Edit Photo Session	X	-	X	-	-	X	-	X	-
Read Photo Session	X	-	-	X	-	-	-	-	-
View Photo Session	X	-	X	X	X	X	-	X	-
View Report	X	-	-	-	-	-	X	X	-
Download Report	X	-	-	X	X	-	X	X	-
Downloading marks case as "Reviewed"	X	-	-	-	X	X	X	X	-
Add Client	X	-	-	-	-	-	-	-	-
Add Facility	X	-	-	-	-	-	-	-	-
Add Clinic	X	-	-	-	-	-	-	-	-
Edit Clinic	X	X	-	-	-	-	-	-	-
View Users	X	X	-	-	-	-	-	-	-
Add User	X	X	-	-	-	-	-	-	-
Edit User	X	X	-	-	-	-	-	-	-
Receive Text Messages	No	Yes Overdue cases (2nd time reader is reminded)	No They only upload so no report alerts	Yes when images uploaded+ up to 2 reminders	Yes When images are read (report ready for download)	Yes When images are read	Yes When images are read	Yes When images are read	No

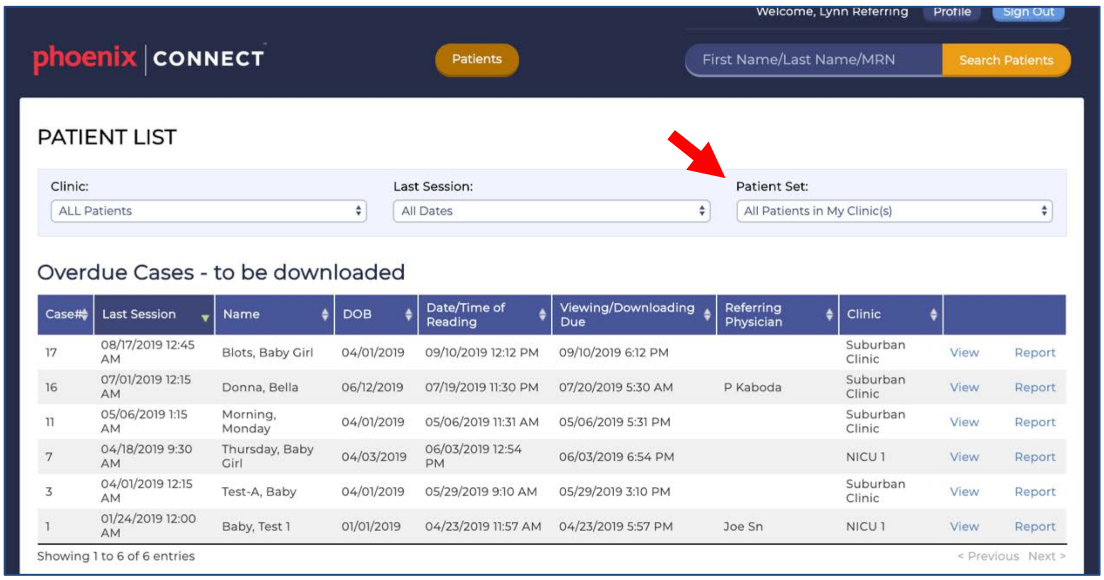
Overview

When a Referring Physician logs in, the screen shall display the Patient List.

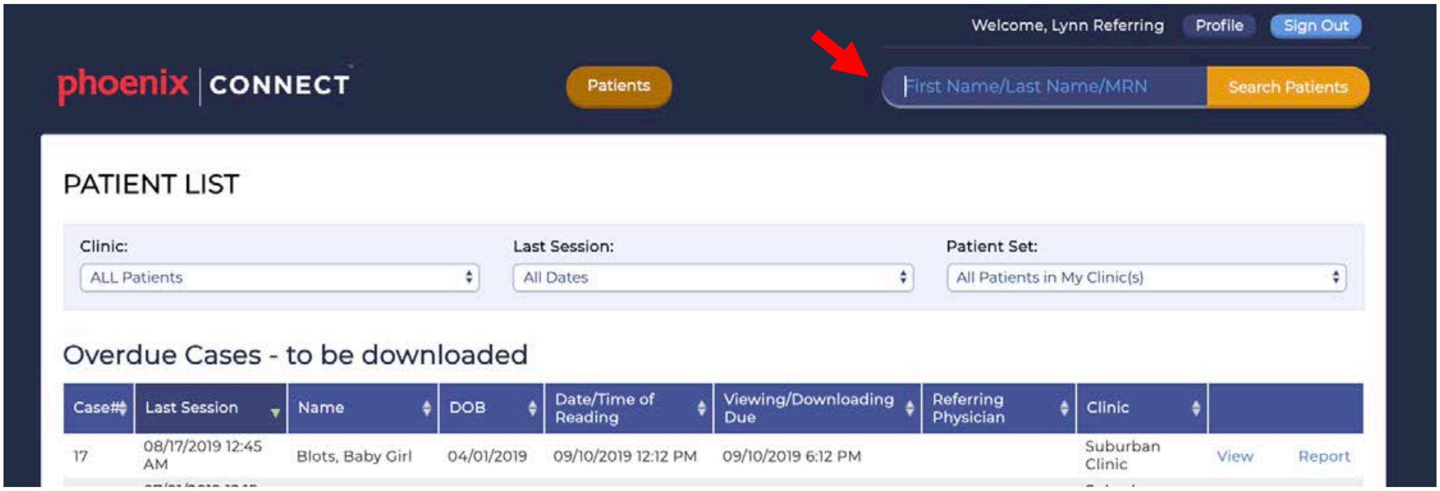
The user may choose to filter the list to a specific clinic (if applicable) the default is “All Clinics.” To change this, select the clinic from the drop-down menu.

The user may also filter the list by the last session date. The default value is “All Dates.” To change this, select the date range to view from the drop-down menu (e.g. “Within One Week”)

The user may choose to view his own patients or all Patients in the clinic by choosing from the Patient Set drop-down.



The user can also search cases by typing in a Patient's First Name, Patient's Last Name or Medical Record Number. The main screen looks something like this:



The Referring Physician will see the following lists on the main patient page:

Overdue Cases to Be Downloaded

The Overdue Cases to Be Downloaded list displays all of the cases that are overdue to be downloaded. The information for each case includes: Case Number, Last Session Date, Name, DOB, Reading Due, Viewing/Downloading Due Date, Referring Physician and Clinic. Each record has a view link which allows the Referring Physician to view the Case. The case also has a Report Link which allows the user to view the Reading Physician's Report.

Overdue Cases - to be downloaded

Case#	Last Session	Name	DOB	Date/Time of Reading	Viewing/Downloading Due	Referring Physician	Clinic		
17	08/17/2019 12:45 AM	Blots, Baby Girl	04/01/2019	09/10/2019 12:12 PM	09/10/2019 6:12 PM		Suburban Clinic	View	Report

Cases to Be Downloaded

The Cases to Be Downloaded list displays all of the cases that are ready to be downloaded. The information for each case includes: Case Number, Last Session Date, Name, DOB, Reading Due, Viewing/Downloading Due Date, Referring Physician and Clinic. Each record has a view link which allows the Referring Physician to view the Case. The case also has a Report Link which allows the user to view the Reading Physician's Report.

Cases - to be downloaded

Case#	Last Session	Name	DOB	Date/Time of Reading	Viewing/Downloading Due	Referring Physician	Clinic		
9	09/30/2019 12:00 AM	Springer, Baby Boy	04/01/2019	11/05/2019 8:43 AM	11/05/2019 2:43 PM		NICU 1	View	Report

Showing 1 to 1 of 1 entries   < Previous Next >

Cases List

The Cases list displays cases for which an interpretation has been rendered. The case list shall display the Case Number, Last Session Date, Name, Date of Birth, Status (Read cases are highlighted in green, Unread cases are highlighted in Red), Downloaded (refers to whether a report has been downloaded or not), Number of Sessions, Case Due, Clinic, A View Link (if images have been uploaded) and a Report Link (if a report has been provided).

Cases

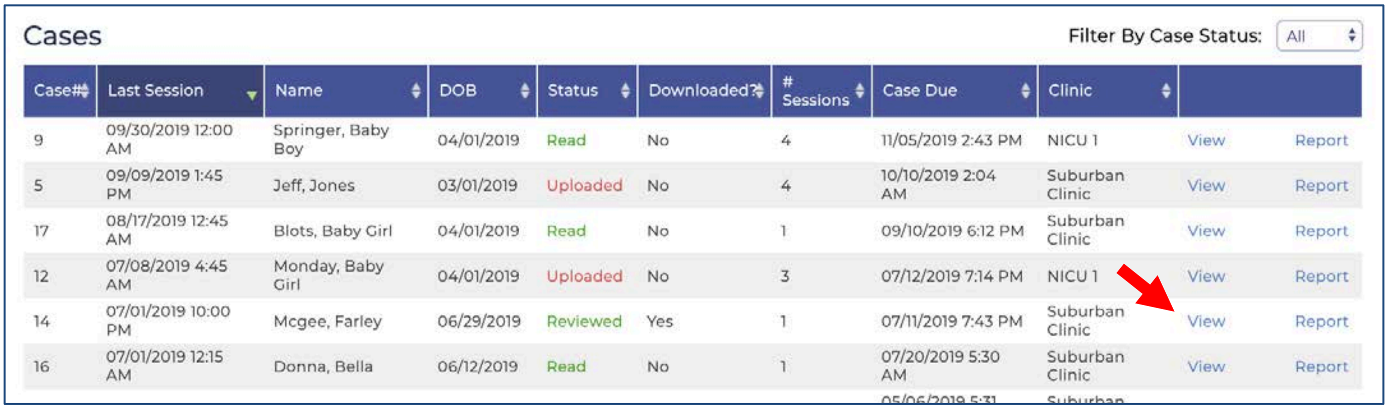
Filter By Case Status: All

Case#	Last Session	Name	DOB	Status	Downloaded?	# Sessions	Case Due	Clinic		
9	09/30/2019 12:00 AM	Springer, Baby Boy	04/01/2019	Read	No	4	11/05/2019 2:43 PM	NICU 1	View	Report
5	09/09/2019 1:45 PM	Jeff, Jones	03/01/2019	Uploaded	No	4	10/10/2019 2:04 AM	Suburban Clinic	View	Report
17	08/17/2019 12:45 AM	Blots, Baby Girl	04/01/2019	Read	No	1	09/10/2019 6:12 PM	Suburban Clinic	View	Report
12	07/08/2019 4:45 AM	Monday, Baby Girl	04/01/2019	Uploaded	No	3	07/12/2019 7:14 PM	NICU 1	View	Report
14	07/01/2019 10:00 PM	Mcgee, Farley	06/29/2019	Reviewed	Yes	1	07/11/2019 7:43 PM	Suburban Clinic	View	Report
16	07/01/2019 12:15 AM	Donna, Bella	06/12/2019	Read	No	1	07/20/2019 5:30 AM	Suburban Clinic	View	Report
							05/06/2019 5:31	Suburban		

Please note: It is possible for a case to appear as unread for a Referring Physician and to show a view and a report link. Both links will display a previously completed interpretation and report for the case, and the “Unread” status means that there is a new photo session still to be read for that patient.

Viewing an Interpretation

The Referring Physician will click the "View" Link which will display the Patient Details page.



Cases

Filter By Case Status: All

Case#	Last Session	Name	DOB	Status	Downloaded?	# Sessions	Case Due	Clinic		
9	09/30/2019 12:00 AM	Springer, Baby Boy	04/01/2019	Read	No	4	11/05/2019 2:43 PM	NICU 1	View	Report
5	09/09/2019 1:45 PM	Jeff, Jones	03/01/2019	Uploaded	No	4	10/10/2019 2:04 AM	Suburban Clinic	View	Report
17	08/17/2019 12:45 AM	Blots, Baby Girl	04/01/2019	Read	No	1	09/10/2019 6:12 PM	Suburban Clinic	View	Report
12	07/08/2019 4:45 AM	Monday, Baby Girl	04/01/2019	Uploaded	No	3	07/12/2019 7:14 PM	NICU 1	View	Report
14	07/01/2019 10:00 PM	Mcgee, Farley	06/29/2019	Reviewed	Yes	1	07/11/2019 7:43 PM	Suburban Clinic	View	Report
16	07/01/2019 12:15 AM	Donna, Bella	06/12/2019	Read	No	1	07/20/2019 5:30 AM	Suburban Clinic	View	Report

The most recently interpreted photo session shall be displayed first.

To get a close up of the images in the interpretation, you may click on one of the thumbnails which will display a bigger version.

You may also edit the images in the following way:

Enhancing Images

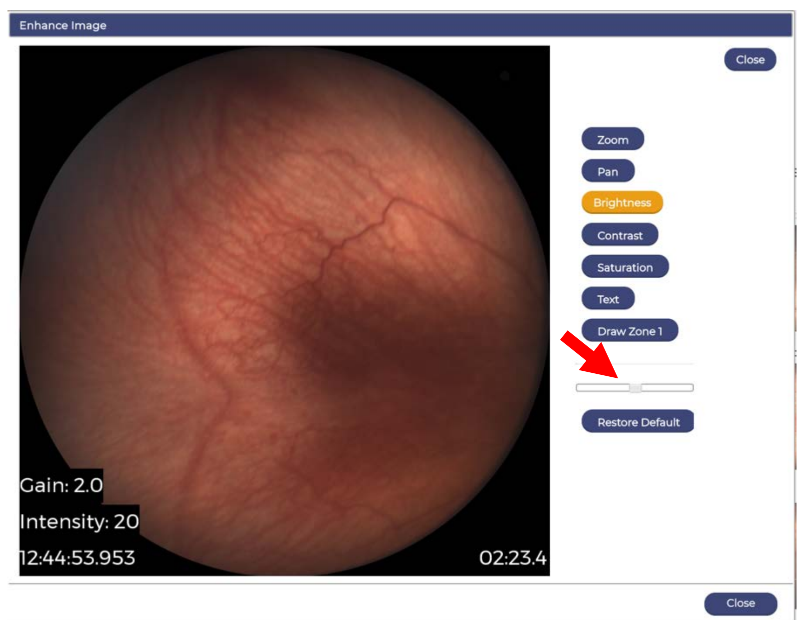
If you find you need to enhance an image to get a clearer view, click on the thumbnail of the image as described above.

Doing so will bring up an image editing panel.

Click the button for the type of adjustment you wish to make (e.g. Brightness).

Adjust the slider as necessary to change your view.

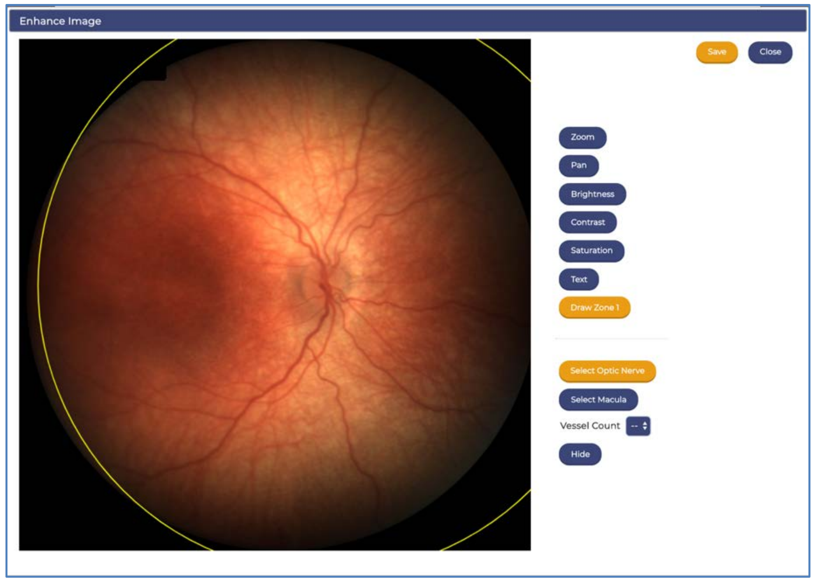
Image edits may NOT be saved.



Draw Zone 1

One of the options in the enhance image panel is to Draw Zone 1. To do so:

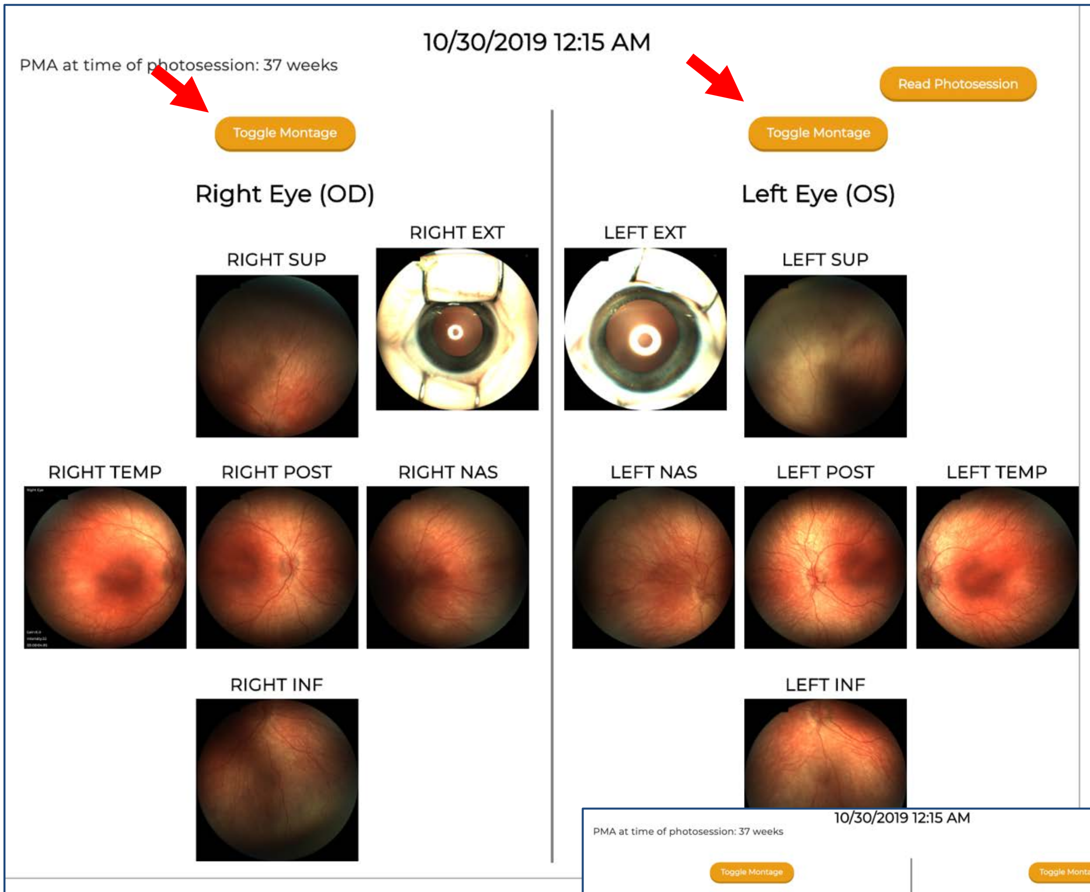
1) Click "Draw Zone 1"
2) "Select Optic Nerve" will be highlighted. Click on the image over the optic nerve.
3) "Select Macula" will be highlighted. Click on the image over the macula.
4) The system will draw a circle corresponding to Zone 1 in yellow.

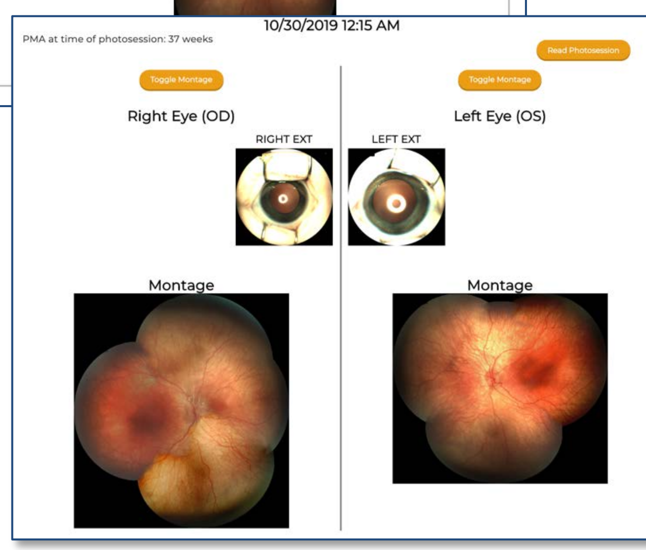


Viewing Montaged Images

The system will automatically montage the SUP, POST, NAS, TEMP and INF images for each eye when possible. To view the montaged images, click the “Toggle Montage” button.

It will display the montage in place of the thumbnails as shown:

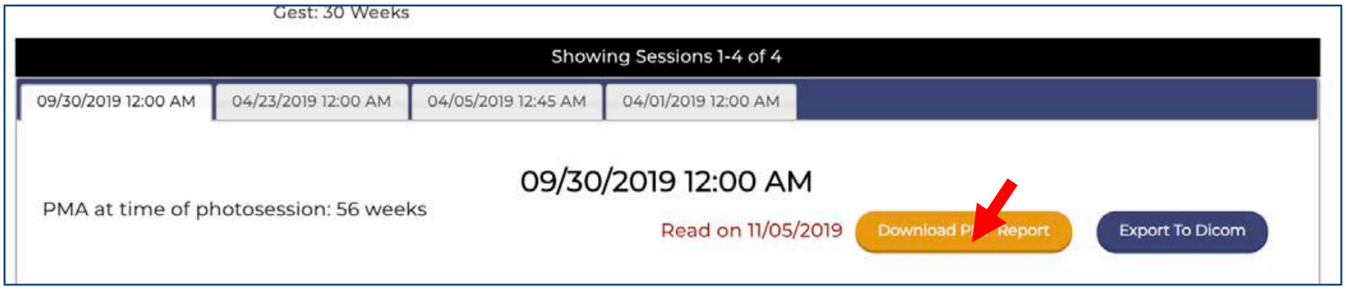




Click the “Toggle Montage” button a second time to turn the montage off.

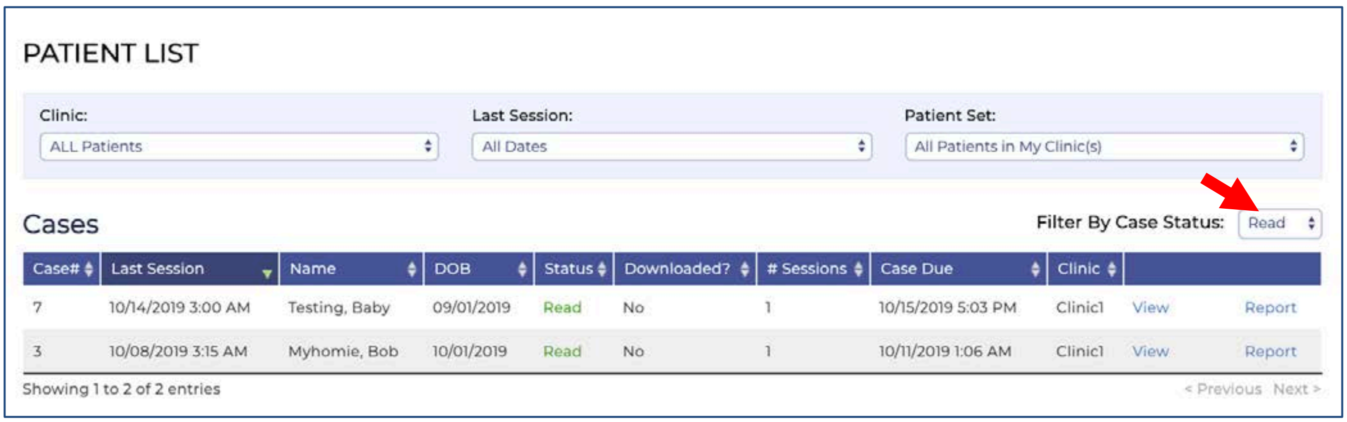
Downloading a Report

To download a report, click the “Download PDF” button on the Patient Details page to download a copy of the report to your computer.



OR

You may also download the report by going to the Patient List. It is easier to find the case if you filter the Patient List by “Read” cases by choosing “Read” in the drop-down.



Then click the “Report” link for the patient whose report you wish to view. This will display the Interpretation page.

To download the report, click the “Download PDF” button.

Please note: to download a previously filed report, click on the tab corresponding to the date of the report you wish to print and follow the instructions above.

Printing Your Report

You may Print a copy of your report once it has been downloaded by printing the PDF file.

Important: Please note that you MUST download the report in order for the case to be marked as “Reviewed” in the database. Otherwise it will show as “Read” but not “Reviewed”. This will also cause the case to become late if it isn’t downloaded in a timely fashion.

Printing Technician

Printing Technicians

Printing Technicians are allowed to print reports for any clinic for which they have permission.

Overview

When a Printing Technician logs in, the screen shall display the Patient List.

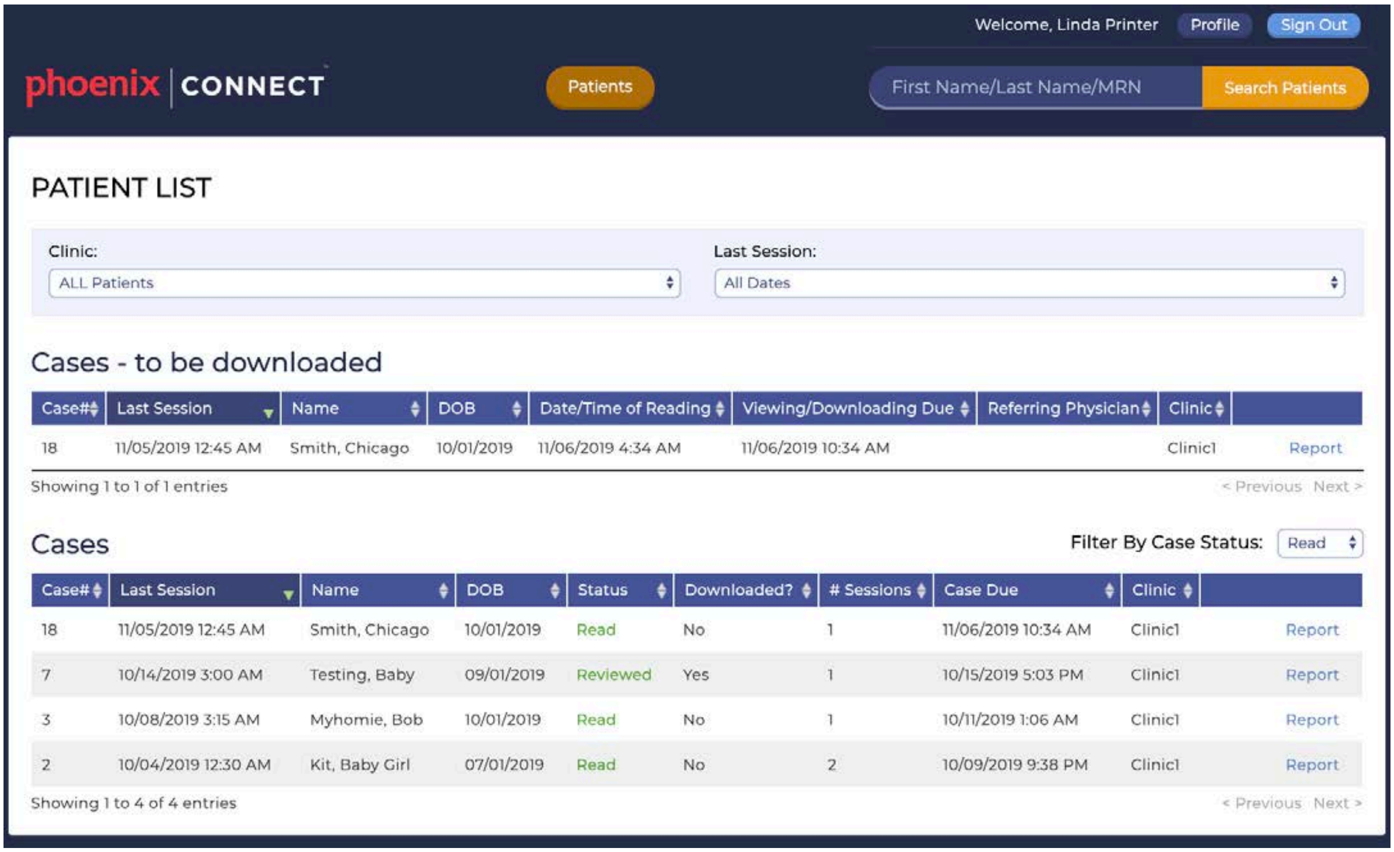
The user may choose to filter the list to a specific clinic (if applicable) the default is "All Clinics." To change this, select the clinic from the drop-down menu.

The user may also filter the list by the last session date. The default value is "All Dates." To change this, select the date range to view from the drop-down menu (e.g. "Within One Week".

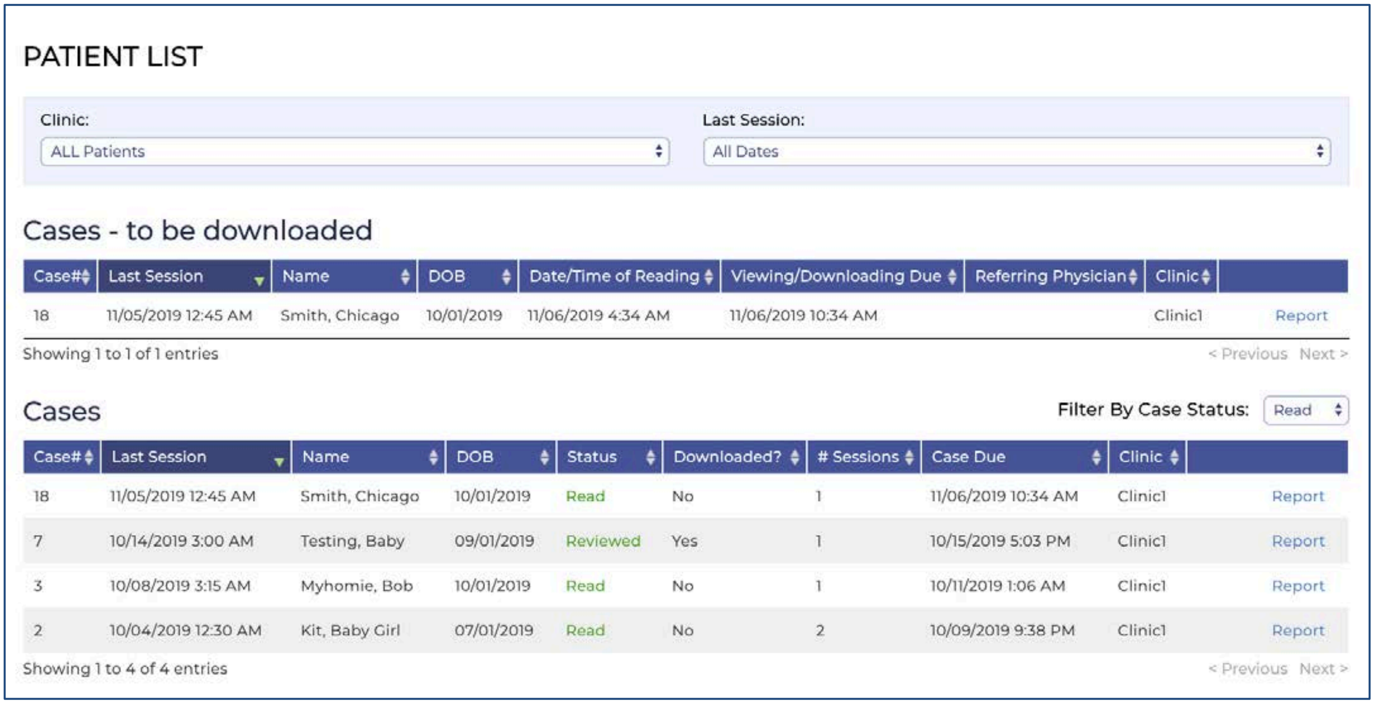
Phoenix CONNECT Role Features

Feature	PTG Master Admin	Client Admin	Upload Tech	Reading Physician	Referring Physician	Referring Physician (upload)	Printing Tech	Upload / Printing Tech	Supervisor
See Case List	X	X	X	X	X	X	X	X	X
Edit Patient Data	X	X	X	-	-	X	X	X	-
View Patient Data	X	X	X	X	X	X	X	X	-
Upload Photo Session	X	-	X	-	-	X	-	X	-
Edit Photo Session	X	-	X	-	-	X	-	X	-
Read Photo Session	X	-	-	X	-	-	-	-	-
View Photo Session	X	-	X	X	X	X	-	X	-
View Report	X	-	-	-	-	-	X	X	-
Download Report	X	-	-	X	X	-	X	X	-
Downloading marks case as "Reviewed"	X	-	-	-	X	X	X	X	-
Add Client	X	-	-	-	-	-	-	-	-
Add Facility	X	-	-	-	-	-	-	-	-
Add Clinic	X	-	-	-	-	-	-	-	-
Edit Clinic	X	X	-	-	-	-	-	-	-
View Users	X	X	-	-	-	-	-	-	-
Add User	X	X	-	-	-	-	-	-	-
Edit User	X	X	-	-	-	-	-	-	-
Receive Text Messages	No	Yes Overdue cases (2nd time reader is reminded)	No They only upload so no report alerts	Yes when images uploaded+ up to 2 reminders	Yes When images are read	Yes When images are read	Yes When images are read	Yes When images are read	No

The user can also search cases by typing in a Patient's First Name, Patient's Last Name or Medical Record Number. The main screen looks something like this:



The Printing Technician may see the following lists on the main patient page:


PATIENT LIST

Clinic: ALL Patients

Last Session: All Dates

Cases - to be downloaded

Case#	Last Session	Name	DOB	Date/Time of Reading	Viewing/Downloading Due	Referring Physician	Clinic	
18	11/05/2019 12:45 AM	Smith, Chicago	10/01/2019	11/06/2019 4:34 AM	11/06/2019 10:34 AM		Clinic1	Report

Showing 1 to 1 of 1 entries < Previous Next >

Cases

Filter By Case Status: Read

Case#	Last Session	Name	DOB	Status	Downloaded?	# Sessions	Case Due	Clinic	
18	11/05/2019 12:45 AM	Smith, Chicago	10/01/2019	Read	No	1	11/06/2019 10:34 AM	Clinic1	Report
7	10/14/2019 3:00 AM	Testing, Baby	09/01/2019	Reviewed	Yes	1	10/15/2019 5:03 PM	Clinic1	Report
3	10/08/2019 3:15 AM	Myhomie, Bob	10/01/2019	Read	No	1	10/11/2019 1:06 AM	Clinic1	Report
2	10/04/2019 12:30 AM	Kit, Baby Girl	07/01/2019	Read	No	2	10/09/2019 9:38 PM	Clinic1	Report

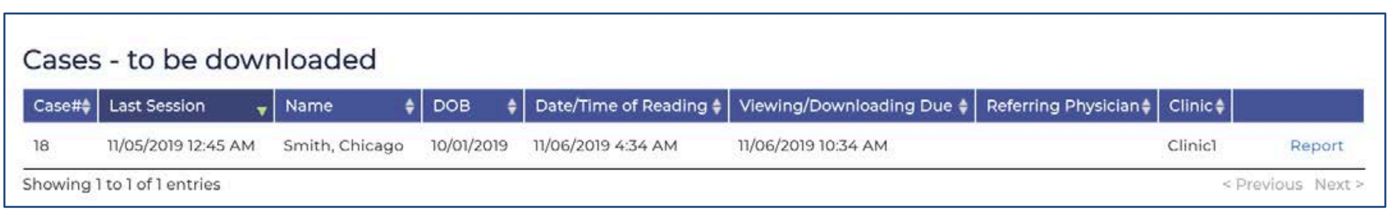
Showing 1 to 4 of 4 entries < Previous Next >

Overdue Cases to Be Downloaded

The Overdue Cases to Be Downloaded list displays all of the cases that are overdue to be downloaded and printed. The information for each case includes: Case Number, Last Session Date, Name, DOB, Date/Time of Reading, Viewing/Downloading Due, Referring Physician and Clinic. The case also has a Report Link which allows the user to view the Reading Physician's Report. This list will not be shown if there are no overdue cases to be downloaded.

Cases to Be Downloaded

The Cases to Be Downloaded list displays all of the cases that are available to be downloaded. The information for each case includes: Case Number, Last Session Date, Name, DOB, Date/Time of Reading, Viewing/Downloading Due, Referring Physician and Clinic. Each record has a view link which allows the Referring Physician to view the Case. The case also has a Report Link which allows the user to view the Reading Physician's Report.


Cases - to be downloaded

Case#	Last Session	Name	DOB	Date/Time of Reading	Viewing/Downloading Due	Referring Physician	Clinic	
18	11/05/2019 12:45 AM	Smith, Chicago	10/01/2019	11/06/2019 4:34 AM	11/06/2019 10:34 AM		Clinic1	Report

Showing 1 to 1 of 1 entries < Previous Next >

Cases List

The Cases list displays cases for which readings have been submitted. The case list shall display the Case Number, Last Session Date, Name, Date of Birth, Status (Read cases are highlighted in green, Unread cases are highlighted in Red), Downloaded (refers to whether a report has been downloaded or not), Number of Sessions, Case Due, Clinic, and a Report Link (if a report has been provided).

Cases

Filter By Case Status: Read

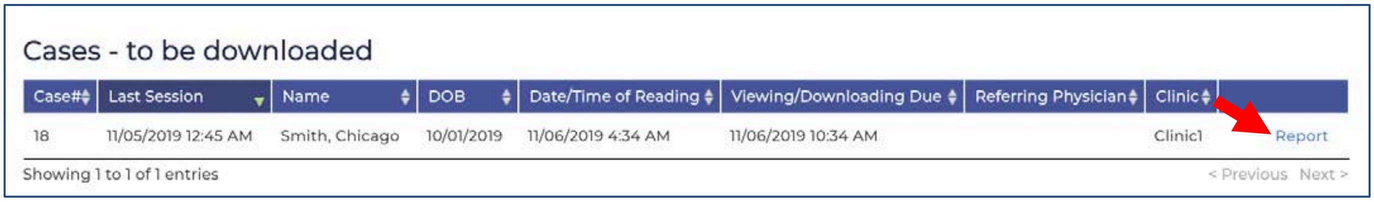
Case#	Last Session	Name	DOB	Status	Downloaded?	# Sessions	Case Due	Clinic	
8	11/06/2019 1:15 PM	K, Ajay	10/12/2019	Read	No	4	11/06/2019 10:48 AM	Clinic1	Report
18	11/05/2019 12:45 AM	Smith, Chicago	10/01/2019	Read	No	1	11/06/2019 10:34 AM	Clinic1	Report
7	10/14/2019 3:00 AM	Testing, Baby	09/01/2019	Reviewed	Yes	1	10/15/2019 5:03 PM	Clinic1	Report
3	10/08/2019 3:15 AM	Myhomie, Bob	10/01/2019	Read	No	1	10/11/2019 1:06 AM	Clinic1	Report
2	10/04/2019 12:30 AM	Kit, Baby Girl	07/01/2019	Read	No	2	10/09/2019 9:38 PM	Clinic1	Report

Showing 1 to 5 of 5 entries < Previous Next >

Please note: It is possible for a case to appear as unread for a Printing Technician and to show a report link. The report link will display a previously completed report for the case, and the "Unread" status means that there is a new photo session still to be read for that patient.

Downloading a Report

To download a report, click the “Report” link for the patient whose report you wish to view. This will display the Interpretation page.



Cases - to be downloaded

Case#	Last Session	Name	DOB	Date/Time of Reading	Viewing/Downloading Due	Referring Physician	Clinic	
18	11/05/2019 12:45 AM	Smith, Chicago	10/01/2019	11/06/2019 4:34 AM	11/06/2019 10:34 AM		Clinic1	Report

Showing 1 to 1 of 1 entries   < Previous Next >

To download the report, click the “Download PDF” button.

Please note: to download a previously-filed report, click on the tab corresponding to the date of the report you wish to print and follow the instructions above.

Printing Your Report

You may Print a copy of your report once it has been downloaded by printing the PDF file.

Important: Please note that you MUST download the report in order for the case to be marked as “Reviewed” in the database. Otherwise it will show as “Read” but not “Reviewed”. This will also cause the case to become late if it isn’t downloaded in a timely fashion.

Phoenix CONNECT Administration

Administrative Functions

Overview

The administrative functions available in the Phoenix CONNECT system allow a Phoenix CONNECT administrator to perform a variety of administrative functions.

Main Administration Screen

When a Client Administrator logs in, the screen shall display a menu of links to the administrative functions for which the user has administrative rights. For the purpose of this manual, we will assume that the administrative user is a Phoenix CONNECT administrator and has access to all of the administrative capabilities in the system. Other users who are Client Administrators may only have a subset of these capabilities depending on the level of management they are provided by Phoenix Technology Group when the account is created. Client Administrators do not have access to Reporting features.

Phoenix CONNECT Role Features

Feature	PTG Master Admin	Client Admin	Upload Tech	Reading Physician	Referring Physician	Referring Physician (upload)	Printing Tech	Upload / Printing Tech	Supervisor
See Case List	X	X	X	X	X	X	X	X	X
Edit Patient Data	X	X	X	-	-	X	X	X	-
View Patient Data	X	X	X	X	X	X	X	X	-
Upload Photo	X	-	X	-	-	X	-	X	-
Edit Photo Session	X	-	X	-	-	X	-	X	-
Read Photo Session	X	-	-	X	-	-	-	-	-
View Photo Session	X	-	X	X	X	X	-	X	-
View Report	X	-	-	-	-	-	X	X	-
Download Report	X	-	-	X	X	-	X	X	-
Downloading	X	-	-	-	X	X	X	X	-
Add Client	X	-	-	-	-	-	-	-	-
Add Facility	X	-	-	-	-	-	-	-	-
Add Clinic	X	-	-	-	-	-	-	-	-
Edit Clinic	X	X	-	-	-	-	-	-	-
View Users	X	X	-	-	-	-	-	-	-
Add User	X	X	-	-	-	-	-	-	-
Edit User	X	X	-	-	-	-	-	-	-
Receive Text Messages	No	Yes Overdue cases (2nd time reader is reminded)	No They only upload so no report alerts	Yes when images uploaded+ up to 2 reminders	Yes When images are read (report ready for download)	Yes When images are read	Yes When images are read	Yes When images are read	No

After signing in, to access the administration screen, click on the "Administration" button in the menu bar.

The administration screen will appear.

The administration screen shall allow a user to access:

- Clinic Management
- User Management

Overall Process

If you need to add a new clinic to the system, you will need to follow these general steps:

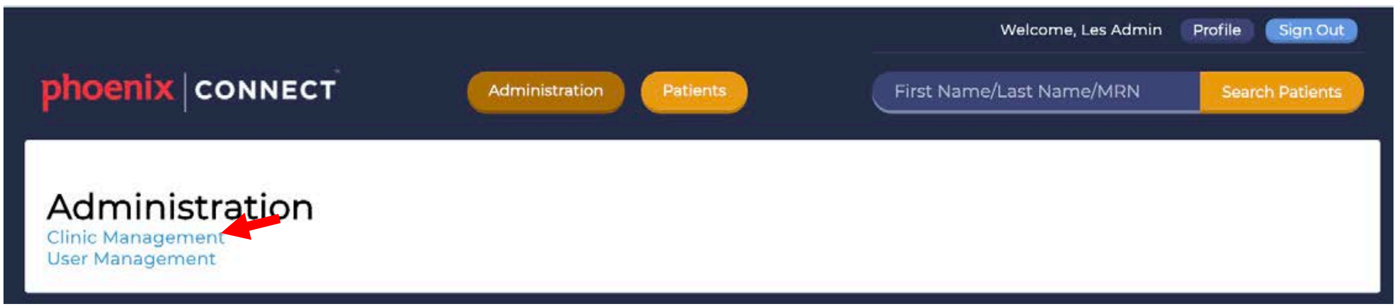
(Add a Clinic (e.g. Specific NICU)

1) Add a user
    a) Add a specific user
    b) Edit the specific users profile you just added to assign a user role
        i) Specify the type of user (e.g. reading physician)
        ii) Specify the clinic(s) to which a user has access
        iii) Specify whether or not the user has administrative acces

Clinic Management

To access the Clinic Management portion of the system, click on the "Administration" button in the menu bar.

The administration screen will appear.

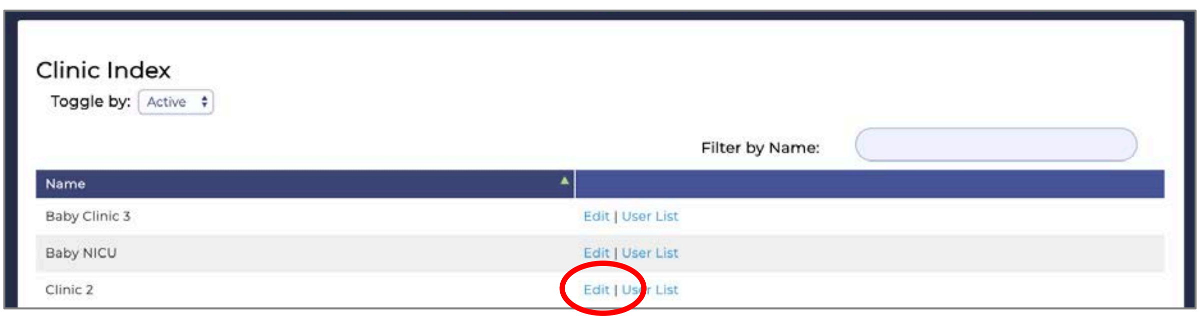


Click the Clinic Management link on the Administration Page to bring up the Clinic Index.

If you do not see the name of the clinic you are looking for on the Clinic Index page, you may begin to type a name in the "Filter by Name" field and all of the clinics that match those criteria will be shown in the list below.

Editing a Clinic

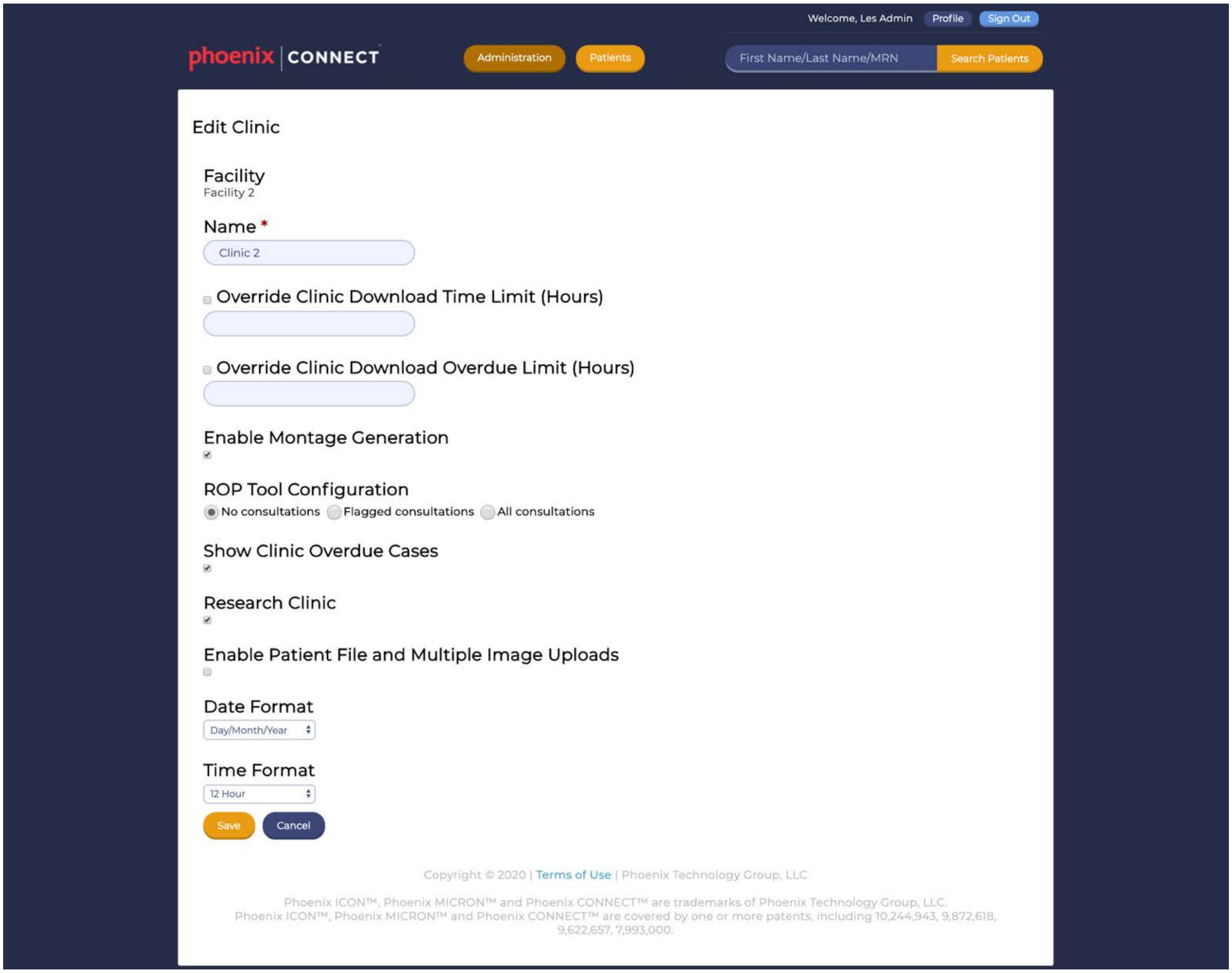
Find the name of the clinic whose information you wish to edit and click the "Edit" link beside the clinic's information.



Clicking on this link in either location shall display the Clinic's information as previously entered.

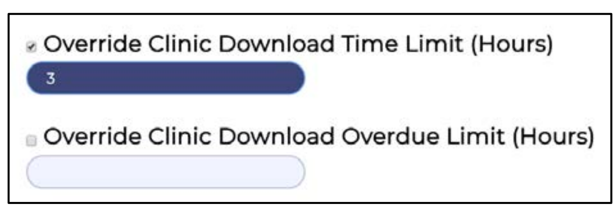
Make the necessary changes and click "Save."

Edit Clinic Details



Name: You may change or update the Name of the clinic.

Override Clinic Download Time Limit (Hours):



To close the loop and ensure that the uploading screening clinic has received a report by the ophthalmologist, there is a Clinic Download Time Limit enforced. The standard Download Time Limit for reports to be downloaded after images are read is set by default for the entire platform by Phoenix Technology Group. Your trainer will tell you what that time limit is. Once that time limit passes, the case is considered overdue. The time limit for overdue cases can also be set.

To change the number of hours that constitute an overdue case, click in the check box next to the override you wish to apply and enter the number of hours in the text box.

Enable Montage Generation

To turn montage capabilities on for a clinic, click the checkbox next to Enable Montage generation.

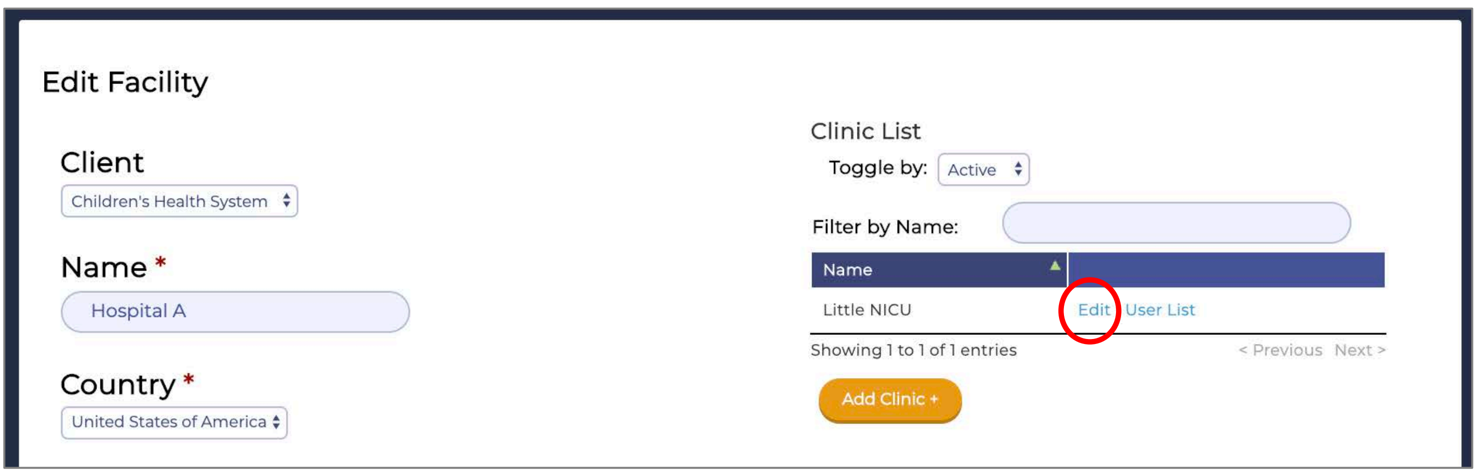
ROP Tool Configuration is an inactive feature and should be set to No consultations.

Research Clinic should be left with the box unchecked. If the box is checked, no users will receive notifications at the specified clinic when images are uploaded.

Enable Patient File and Multiple Image Uploads is an inactive feature and should be left with the box unchecked.

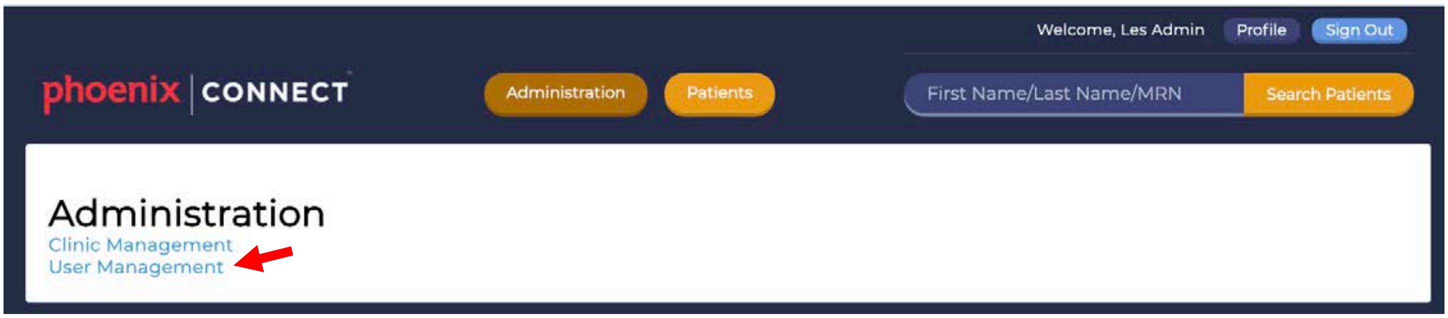
Date Format: Choose from a selection of day, month, year options for the data to be displayed.

Time Format: Choose a 12 or 24 hour time display.

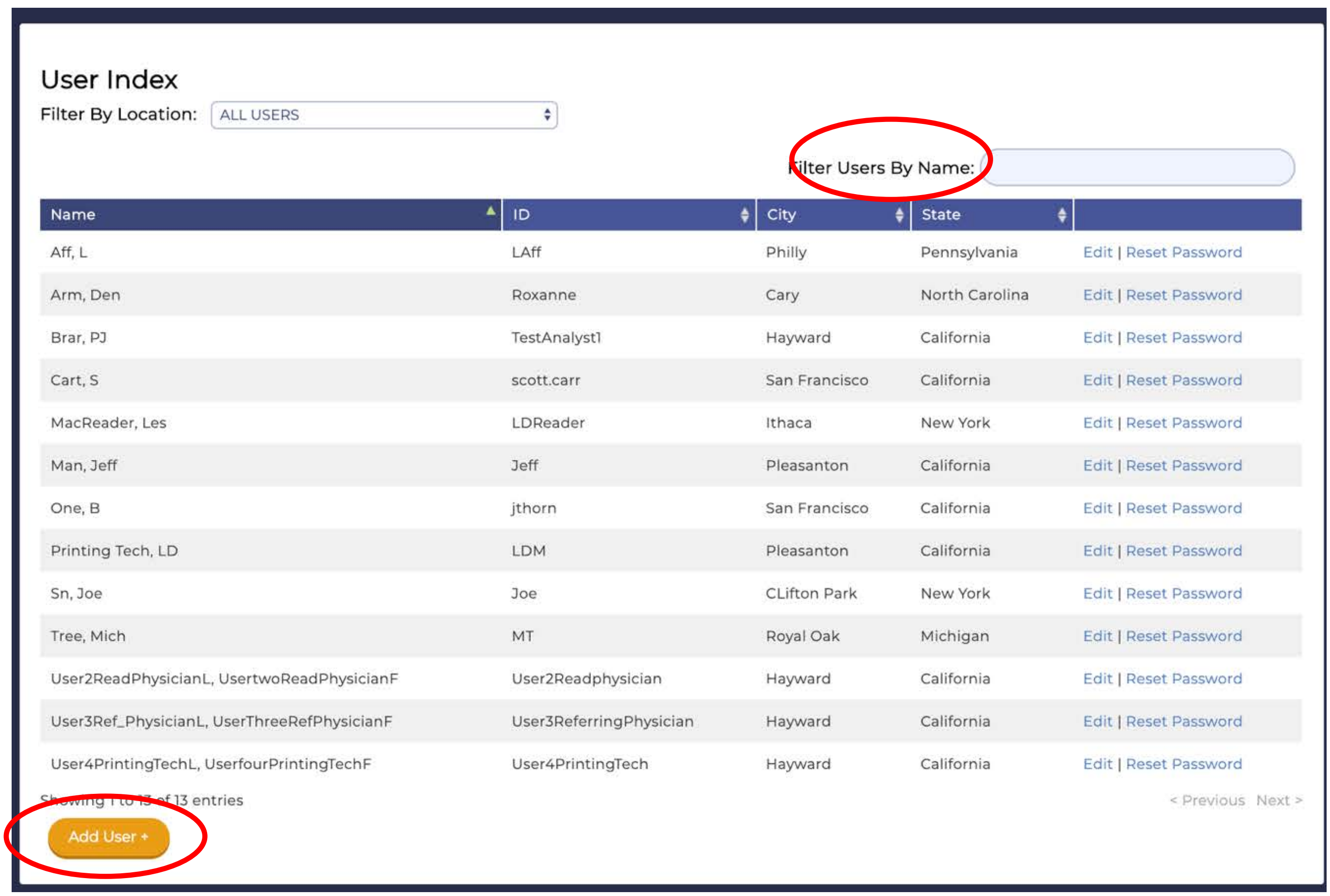


User Management

To access the User Management portion of the system click on the “Administration” button in the menu bar.



This will bring up the User Index.



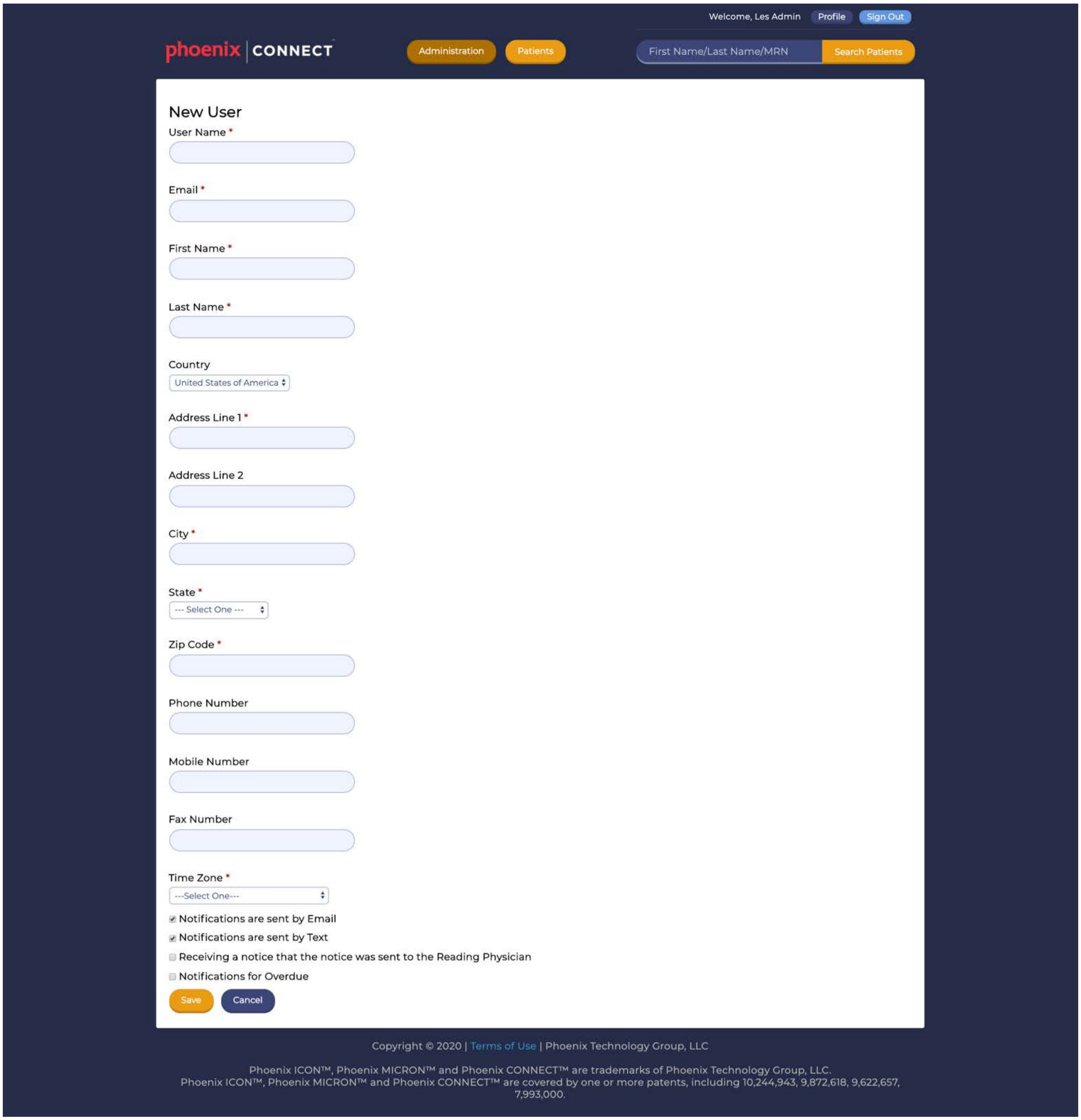
You may search for a user by typing in part of the user’s name and all of the users that match the search criteria will be shown in the list below. If you cannot find a match, you will need to add a new user.

Adding a New User

To add a new user, click on the “Add User” button. This will display the New User page.

New User Page

Begin by entering the user’s information into the textboxes. The required fields will be designated with a red *.



The system will check to make sure that all of the necessary information has been entered into the system. If there is information missing the system will notify you that required information is missing or formatted incorrectly.

When finished entering the new user information, click the "Save" button. The new user will appear in the user index.

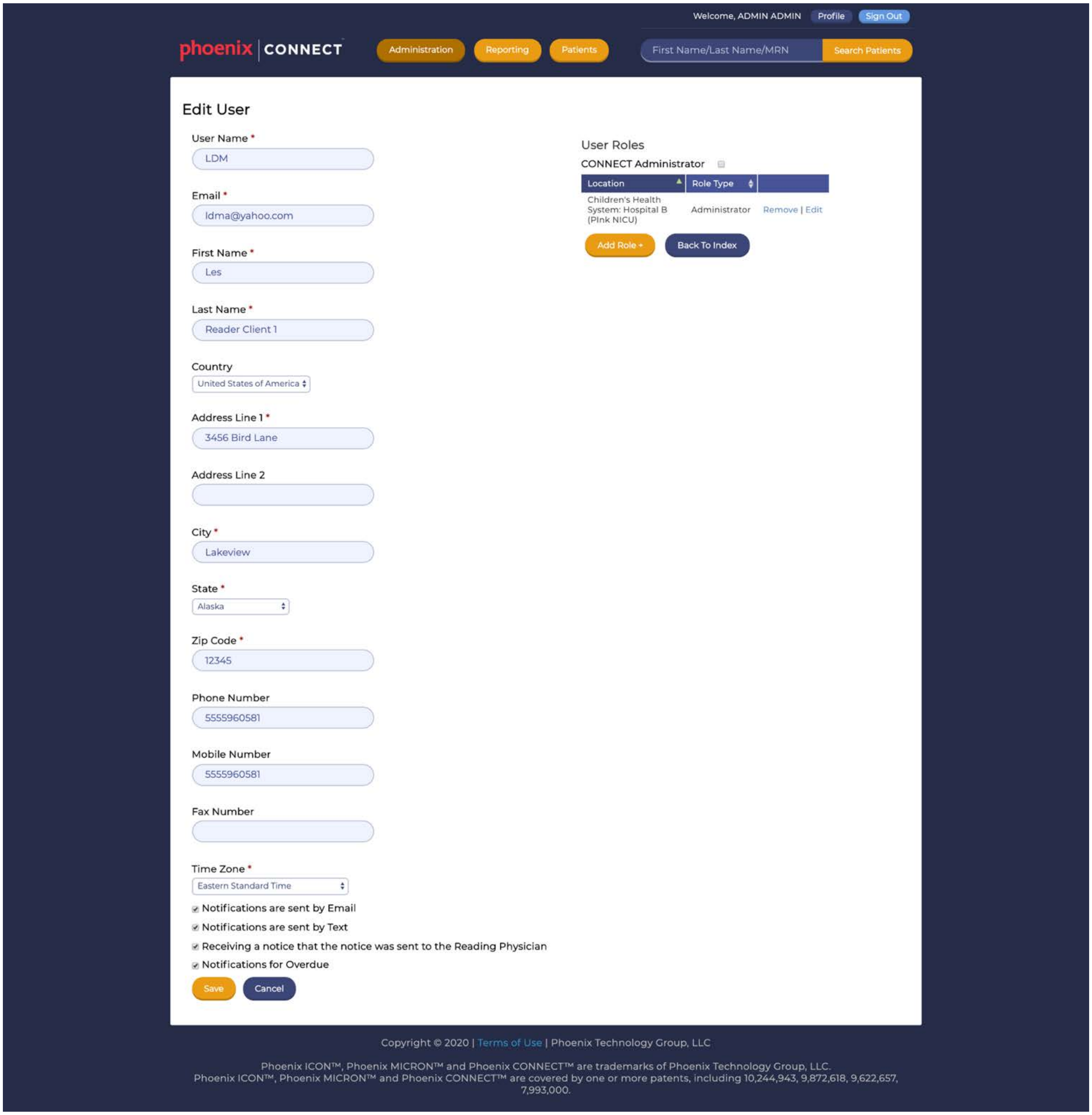
Please note: In order to fully add a user to the system, they must also be assigned a user role. Assignment of user roles requires a second step whereby the administrator to Edit a User's Profile to add one. Please see "Adding a User Role" for more information on how to add a role to a user's account.

Editing an Existing User

If you need to edit the information for an existing User, go to the User Index page by clicking the User Management link on the administration page.

Find the name of the user whose information you wish to edit and click the "Edit" link beside the user's information.

You may also use the "Filter By Location" dropdown to find users by location.

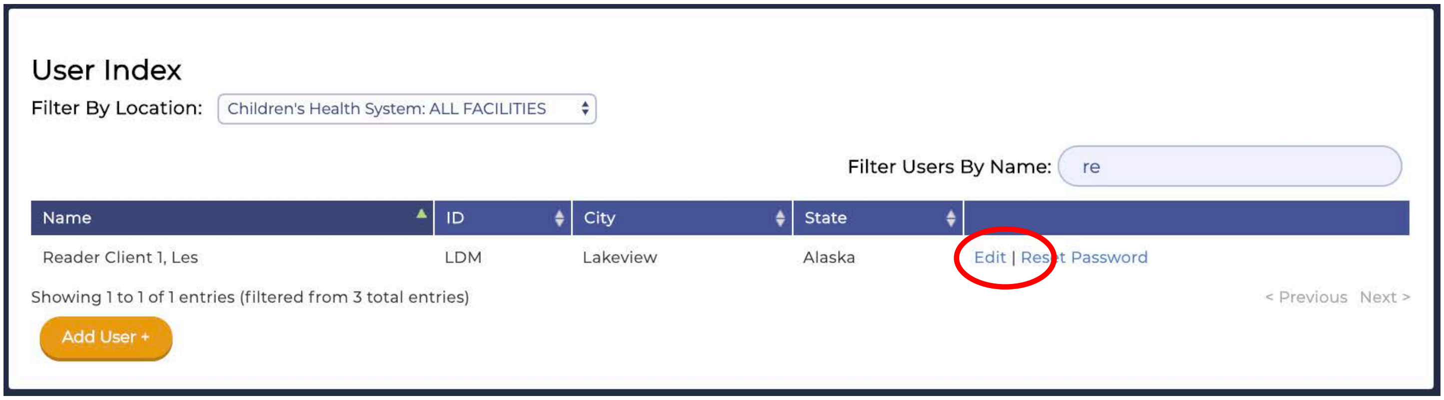


Clicking on this link in either location shall display the User's information as previously entered. Make the necessary changes and click "Save."

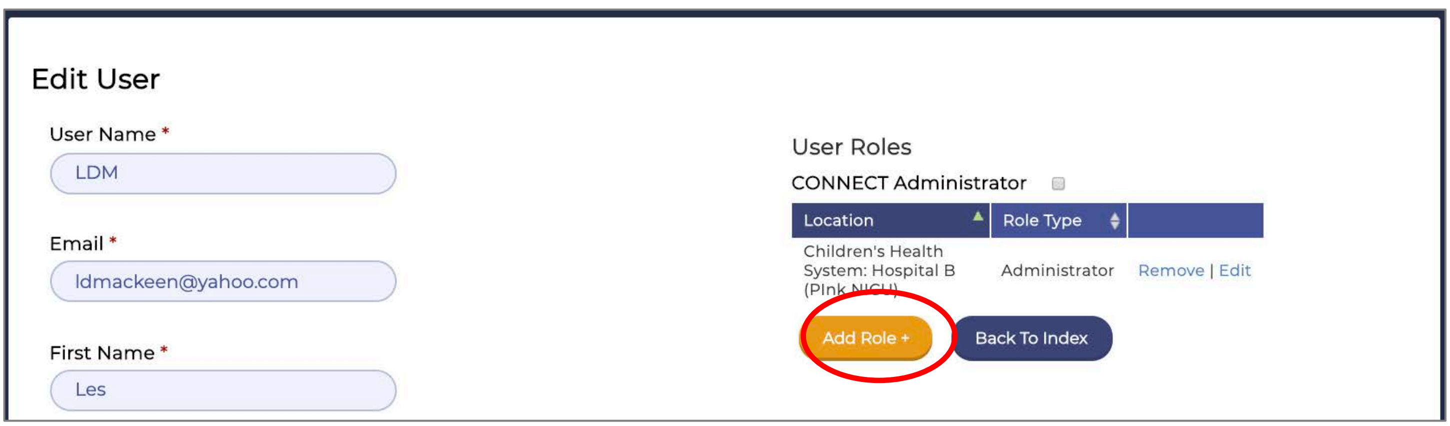
Adding a New Role

If you need to add a new role to an existing User, go to the User Index page by clicking the User Management link on the administration page.

Find the name of the user whose information you wish to edit and click the "Edit" link beside the user's information.

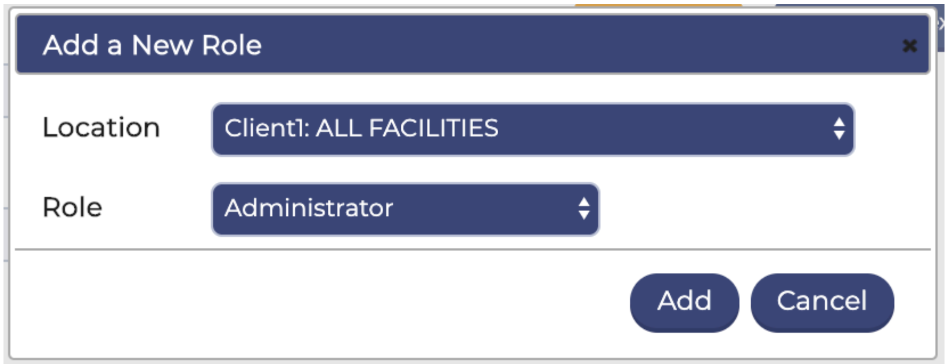


Clicking on this link shall display the User's information as previously entered.



To add a new role, click on the "Add Role" Button on the right side of the Edit User Screen.

This will display the following dialog box.



Choose a location for which the access is being assigned and the role that the user should be granted at that location and click “Add”

The new role will now appear in the user’s profile.

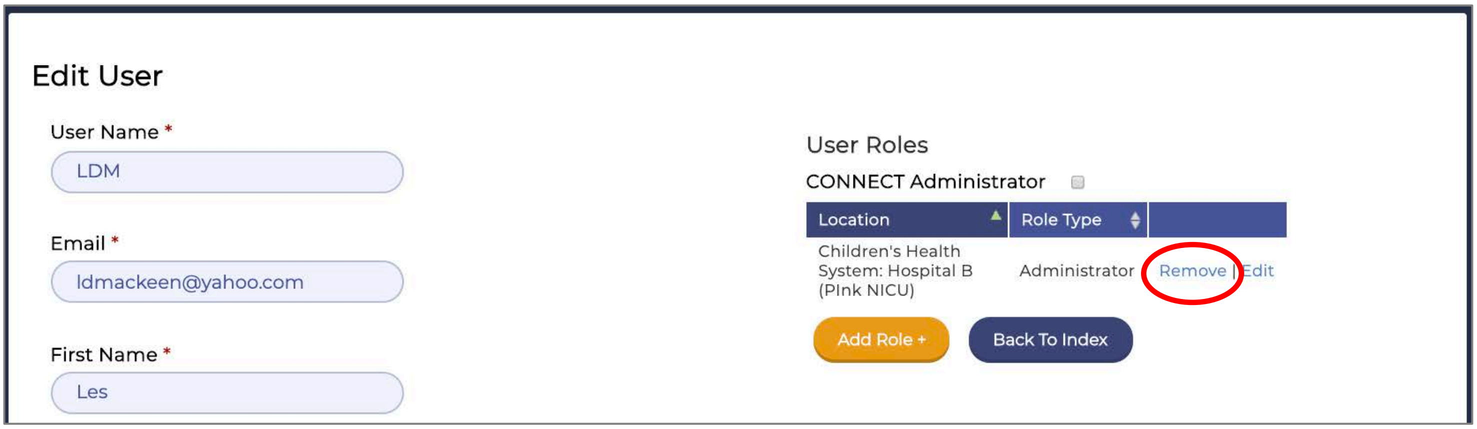
Removing a Role

If you need to remove a role from an existing User, go to the User Index page by clicking the User Management link on the administration page.

Find the name of the user whose role you wish to remove and click the “Edit” link beside the user’s information.

Clicking on this link shall display the User's information as previously entered.

To remove a role, click on the "Remove" link next to the role in the list that you wish to remove on the right-hand side of the Edit User Screen.



The role will be removed from the list.

Please remember that without a user role assigned, a user does not have access to the system.

Password Resets

An administrator can request a password reset for a user. To do so, go to the User Index page by clicking the User Management link on the administration page.

Find the name of the user to whom you wish to send a Password Reset email and click the “Password Reset” link. The system will send an email to the user to allow them to reset their password.

Once you click Reset Password, the status will say “View Token”.

If you click the “View Token” link, it will provide you with a link that you may e-mail the user in the event that the automated password reset message from the CONNECT platform goes to their spam folder.