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**Where do you start?**

Velox Suite – is a web-based system and is accessed via the interface of the web browser.

Every user is going to have a unique user name and password combination. To login in the system you can use any browser, but we recommend NOT to use Internet Explorer, as it can have limited functionality.

To login the application you should launch Velox Suite Application icon on your desktop, which will bring you to the login page. If for any reason you don’t have Velox Suite Application icon on your desktop, you can just type or copy this URL [http://app1.veloximaging.net](http://app1.veloximaging.net) into the address bar of your browser.

After that just put your unique user name ID and password and press LOGIN.
**Velox Suite navigation**

On the top of the screen you will see the name of the clinic. Before starting work, please make sure that it is the name of your clinic, otherwise you can switch between the clinics using white arrow next to the clinic name. Your name and login should appear on the left side of the window.

You can see main navigation menu just under the name of the clinic. You can switch between pages using those buttons: Reception, Transcription, PACS, Management, Billing, and Administration. When opened, the name of the page is highlighted in grey oval shape indicating that you on that particular page. For example, on the screenshot below Management page is opened. You will always see this navigation menu no matter which page is opened, so that you can always easily navigate across the system.

Within the page you can switch between subcomponents as well. For example on Management page there are 2 subpages – Dashboard and Encounters. You can switch between them using icons of a lower menu.

Global search enables you to search for any patient by entering the health card number or last name on top corner search bar and press enter.
Management Dashboard

Management Dashboard is a comprehensive tool for general overview and management of the clinic. You can see all locations at a glance or see an overview of the work of your clinic. Key component here is a performance data for the clinics.

On the screenshot below we can see 3 different locations. The columns in front of the name of the clinic represent different stages of encounter workflow, so that we can see number of the patients on each stage of the study execution. For example, at Acme Digital Imaging clinic there are 35 patients checked-in, 11 patients have done their studies already and we can see that their images are attached in the system, 7 cases have been dictated and 2 are finalized.

In the last 2 columns you can see Rejected cases. If it was rejected by typist or by the radiologist, rejected cases will appear in those columns. It helps to keep track on a smooth workflow of each case and to take immediate steps to fix any problems occurring.

On the top of the dashboard (marker 1) you can see alerts for Emergency, Rejected and Not linked cases. So if any case needs your special attention it is just in front of your eyes.
Top 10 Referrers box (marker 2) helps you to see right away which referrals are sending you the most patients. This quick box allows you to keep track on all your referral statistics and manage your referral relationships better. You can choose different time frames to see top 10 referrals within 1 week, 3 days, 1 day and 12 hours.

You can keep an eye on the Worklists of your Radiologists and see how many studies are assigned to each radiologist in the Radiologist Worklist (marker 3). For example, in the case shown on the screenshot there are 2 studies that are not assigned to any of the radiologist, 7 and 4 studies assigned to Dr. Sample and Dr. Swatch accordingly. You can also see what the oldest study is and what the time of recent login of each radiologist is.

The beauty of this dashboard is that while you have the overview of your clinic, you can drill down at any stage of an encounter workflow. If we click any number on the dashboard it will open up those cases for you, giving us an opportunity to go deeper in the details about any particular case, examine reports and edit encounters.
**Encounter Management**

Encounter management contains all encounter information - status, number of study images, patient and referrer information, all related to the study documents and workflow progress.

You can use comprehensive filters to sort out the encounters by the clinics, modalities, workflow statuses, patient ID and service dates.

What is more, you can easily manage grouped encounters by choosing SELECT ALL, UNSELECT ALL buttons. Here you can change statuses and assign/reassign radiologists for the multiple studies at one shot. To do that just checkmark needed encounters and click on the Radiologist icon on the top of the filter field. In the opened dropdown select name of radiologist to assign/reassign the cae.

You can get more detailed information about each of the Encounters by clicking on the button with a pencil icon. It will bring you to the Edit Encounter page. You can view all related to the study documents and images, listen to the audio file, change statuses and assign radiologist, easily edit patient or referrer information, and print reports on this page.
Edit Encounter

Encounter management is conducted from Edit Encounter page.
1) **Encounter**

This section contains basic information about Encounter: the location, the day and time of the Encounter creation. You can edit encounter details using Edit icon: This icon appears when you move your mouse in the bottom right corner of the element.

- Change Encounter location
- Change the date of the Encounter
- Change the priority of the case

2) **Patient**

Here you can review and update all the patient profile information. You can edit or update patient information using Edit icon. Chose another patient from the database of existing patients by typing his/her last name in the Last Name field.

3) **Referrer**

Get the details about the referrer in this section. You can update Referrer information with the Profile button, or choose another Referrer using Swap.

4) **Correspondence**

Keep track on encounter documents and reports delivery.

5) **Billing**

In this section you can review encounter billing – type of insurance, # of claims submitted and claims’ totals. B Claim will show technical fees, C Claim – professional. Graphical diagrams next to sums show amount submitted and paid.

6) **Documents**

Manage and scan encounter documents in this section. Scan requisition sheets using Scan icon.

7) **Services**

Easily add studies to the encounter and choose a service you want to add from the list opened in a new window. You can change or delete service using first button next to the service name. Scan all related to the study documents with a Scanner icon.
You can change Service status or assign/reassign radiologist by clicking links of service status or name of the referrer on the panel. Document icons show number of files of each type in the encounter.

View and manage study images and reports, work sheets and audio files in this section.

**Calendar**

You can book and schedule appointments for the patients.

You can find Calendar under Reception tab of the main Manu.

In the left corner you can see a mini calendar (marker 1), which allows you to switch between days/weeks/month, finding needed day very quickly. You can switch between the Day and Week view of the calendar (marker 4).

Under mini calendar you see clinic locations and resources (marker 2). Select needed location and checkmark resource (room/technician/modality/machine). Check marked resources will be displayed in the calendar as soon as you mark them. Color indication will help you to determine resources on the calendar.

To book appointment just double click in the calendar in the spot of required resource, day and time. Opened in a new wizard will help you to create a new appointment step by step.
In an opened window you will see a patient registration form to fill in the information about the patient (marker 1). Use Clear Form function if you want to clear up all the filled in fields. You can close the form without saving any data using Cancel button.

To book patient in advance click Save button, when the patient arrived check in the patient with a Check in button.

If patient has previous or upcoming appointments, you will be able to see them under the registration form (marker 2) in Appointments section. To manage associated with the encounter appointments, you can check-mark some/all of them and make needed manipulations.
Workflow management

Starting your work please make sure that you are operating within the domain of your clinic. For that check the name of the clinic at the top of the page. You can change a name of the clinic using white arrow next to the clinic name.

8) Patient registration

To start checking-in a patient, you should select RECEPTION at the navigation menu. It will open you a new patient registration window, where you can check-in a new patient.

9) Fill in patients information

Patient registration window contains all necessary information fields to fill in the patient’s data.
For a new patient:

• Swipe a Health card through the magnetic health card reader. Information of the patient will automatically fill up all the corresponding fields on the form. *(Please note: if the information is not filled out properly, this might be the issue with the magnetic stripe scanner. Please check if it is working on another workstation before contacting technical support).*

• Or enter all data in the fields manually.

• If a patient doesn’t have Health number, remove OHIP number table on the left of the screen by pressing trash bin icon.

• If patient has a Health Card issued by other province, please change insurance ID by clicking ADD INSUARENCE ID and choosing name of the province from the list.

• Verify that all information has been transferred correctly and all fields are filled in properly.

• If there is any additional information regarding patient which has to be saved (like particular care instructions, or medication status), please insert it into ADDITIONAL INFORMATION field.

• Press SAVE PATIENT button once you are done.
For the returning patient:

- Swipe a Health Card through the magnetic health card reader. Information of the patient will automatically fill up all the corresponding fields on the form. *(Please note: if the information is not filled out properly, this might be the issue with the magnetic stripe scanner. Please check if it is working on another workstation before contacting technical support).*

- Fill in the information fields automatically by choosing the patient from the database of the existing patients. To do that you can just start typing the last name of the patient in the Last Name field and the system will offer you matching options from the database.

- If there is any additional information regarding patient which has to be saved (like particular care instructions, or medication status), please insert it into ADDITIONAL INFORMATION field.

- Press UPDATE PATIENT button once you are done.

Next you will get to the patient Encounter page.

10) **Choose study status**

On the **Encounter page** you can choose **study status** – Regular, Urgent, STAT from the list of study statuses.

If on this stage you realize that you have made a mistake and chose a wrong patient, you can press CHANGE PATIENT button, it will bring you back to the Registration page where you can make all needed alterations.
11) **Choose referring physician**

The next step – is **choosing a referring physician**. To do that you can go for one of the following options:

- Start typing the last name of the referrer in the Referrer info field (marker 1) and the system will offer you the list of matching options to choose from (marker 2).
- Choose an existing referral from the database of the clinic by clicking a magnifying glass icon next to the Referral field (marker 3).
- If it is a new referral doctor you can add a referral physician in a database by clicking magnifying glass and ADD NEW REFERRER (marker 4) at the bottom of the pop-up window.

![Image of VELOX Imaging interface](image)

12) **Choose modality and study**

Choose modality and a study from the list on the page. You can choose more than one modality and study for the encounter.

Once you are done press SAVE ENCOUNTER button.
After the encounter has been created, you will be transferred to **encounter information page** where you can scan and add requisition sheet and any other supporting documents.

13) **Scan Requisition sheet**

To scan requisition sheet you need to press scanner icon next to the Documents label (marker 1). Scanned documents will appear on the screen in the Documents window after you scanned them.

14) **Scan Work sheet**

After study is done, scan work sheet for the study. For that you should press Scanner icon next to the name of the study (marker 2). If there is more than one study, you should scan each work sheet for each study separately.

15) **Check images attached**

Check whether images are attached to the study. If images are not attached for any reason, go to PACS page (marker 1) using navigation menu at the top of the page. Press GROUP BY SERIES (marker 2). After that images will get grouped and the system will conduct matching to the existing encounters. You will be offered matching options to link your images. Link images using LINK IMAGES (marker 3).
16) **Assign radiologist**

Assign radiologist by clicking UNASSIGNED next to the study. System will offer you a list of all radiologists to choose from in the pop-up window.

Choose a radiologist from the list.
17) Check Radiologist/Typist Rejected columns on the Management Dashboard

After study is assigned to the radiologist it automatically gets to the Velox Radiology Viewer radiologist worklist. Once radiologist dictates, audio report gets to the Dictated column on the Management Dashboard and typist can make a report. Either radiologist or typist can reject a study due to the insufficient quality of images or audio report. Check Rejected columns on the Management Dashboard to make steps to fix occurred problems.

If radiologist has rejected a case, check whether all images and documents are attached to the study. Rescan missing documents or attach images on the PACS page (for more info go to Check Images attached paragraph).

If the case was rejected by typist check audio file. If audio file doesn’t have any technical flaws, reassign case to the radiologist for re-dictation. If audio file has some problems call technical support.

18) Send Reports

To send report, you should go to Encounter page, open report with a View button, print it out and fax to the referring physicians.
19) Archive Finalized cases

Once case is finalized you can Archive it by choosing a Flag indicator on the Encounters list page and choosing the corresponding status Archived in the list of statuses.

You can also archive case from the Encounter itself. For that just choose a status under the study name and change it to ARCHIVED.
Staff management

1) Adding new staff

Go to ADMINISTRATION STAFF menu.

To add a new staff you should press ADD STAFF button.

Select the Staff Category from the drop-down menu on top.

Please note: Sometimes it is possible for the staff to combine several roles (i.e. sometimes Receptionist can transcribe reports also, or radiologist can be clinic owners). It is possible to select several staff categories at once. The access to pages each staff category will have is set by clinic manager separately.

Fill up the obligatory fields marked with *.

The upper part of the form contains the minimum necessary information of the employee - name and phone number.

Please note: if there is some information missing in fields which are obligatory, the system will show notification on top of the form and fill out the form line.

The middle part of the form will be shown for the referring physicians only. It includes the information of the clinic and information for reports delivery.
The billing code has to be obligatory entered for radiologist. It is also required field for referring doctor, but it’s possible to enter the referrer and return to this page and fill in billing number later. The notification of missing report delivery information or missing billing code number is shown in alerts for receptionist and for billing.

The degree and specialty code refers to radiologist only. The degree will be showing on the final reports, and the specialty code is essential for billing purpose.

Hit save button below once all information is filled in. For new users the login information window has to open.

2) Managing user account

After new employee has been added, the form for managing user account pops up. By default newly created user has no access to the system until it is enabled.

The password is not shown by default. The system can be set in a way that the default password is defined by manager and should be changed later on. Email address is not an obligatory field, but it is highly recommended to enter it for the user. It is also possible to forward login information with link to the web-page and user information to this address.
It is highly recommended to choose the clinic the employee will be working with for receptionists, typists and radiologists. This is speeding up the process as it identifies the default clinic the user will see when working with the system. This also improves the search for employees by clinic.

In case the user has forgotten his password or locked the account, the password can be changed in this window.

The access for user can be temporarily or permanently disabled via Access options. Delete button is used for permanent removing of account, or status is set as disabled if the account is put on hold temporarily.

3) Searching for an existing employee

There is entry box for typing employees’ last name, and additional filters by staff category and clinic name. As soon as you start entering last name, the system initiates the search and will show you the list of people matching the criteria.

You can narrow the search results choosing clinic name and staff category.

Please note: there is not always attachment to clinic for employees. The referring physicians ARE NOT exclusively affiliated to clinics.

Once the search is completed is returns you the proper information in pop up window with results, you can select the user and update the profile, manage user account, or disable it.
Technical Support

If you have any questions or facing some challenges, our technical staff will be happy to assist you.

Technical support number is +1(905) 669 4944 and +1(416) 699 4125

The Support Center operates during business hours 9.00am – 5.00p.m, Monday through Friday, excluding statutory holidays.

Quick workflow hints

1) How to register the patient

- Click on “Registration”
- Enter OHIP #, version code and expiration date (when there is one)
- With Quebec patients click on + add insurance (enter the number on card)
- Enter patient information; name, DOB, address, telephone # (if it is not already in the system
- Click on “Save Patient”
- Enter referring physician in box that says “referrer” (if physician is not there click on + add new referrer and enter information) to enter physician information go in section category and change to referrer, it is IMPORTANT to have physician name, telephone #, fax # and billing #.
- Click save to continue patient registration
- Click on exam to be done
- Click “Save Encounter”

** If patient is for a Chest X-ray, check for previous in “encounters”

** If patient is already in the system always make sure to double check the OHIP expiry date!
2) How to make an encounter correction

If you need to make a correction on patient information

- Enter OHIP # in “search encounters”
- Go onto study and click on the pencil
- Click +add study to add exam
- To change exam click on the 3 lines on right

3) How to deal with Private Billing

- Go to Registration
- On the left where it says OHIP, click on the garbage can and delete it
- Register Patient (Name, DOB etc.)
- Save Patient
- Under encounters it says OHIP, click and change to other.

4) How to scan worksheets (requisitions if they were not scanned while registering the patient)

- Enter OHIP# in section “search encounters”, press enter OR go to Management at the top of the screen find your clinic and click on the number under “checked-in”
- Click on the pencil on the right, then the study on the right scanner icon in the section of “documents” (for requisitions ONLY), Scan requisition
- To scan worksheets for (Ultrasound, Mammography, BMD) click on the scanner icon on the section “studies”, Scan worksheet.
- Before assigning the study to the radiologist, verify that ALL images are arrived.** PRESS F5 TO REFRESH
- After verifying click on “check in” and change to “images attached” then assign study to radiologist reading images

** For CHIRO, in the “check in” box put as “archived” and assign to DR.CHIROPRACTOR
5) **How to print reports**

- Go to Management at the top of the screen
- Go to clinic
- Click on the number in the column “finalized”
- Click on select all
- Click on the tab on the right that looks like a piece of paper with 2 check marks
- Print Reports

**Once printed, click on flag on the right and archived them!**

For Single Reports.

- Click on the study and go in “ study reports” ( click on the eyeball)
- Print Report
- Click on the back arrow and archive the patient (change finalized to archive)

6) **How to make a CD**

- Put a CD in driver
- Put OHIP # in “Search Encounters”, click on the pencil at the right
- Click on “ save images”
- Click on “CD/DVD disk”
- Click Start

7) **How to delete an image**

- Click on the study, then click on the “unlink button” on the right
- Box will pop up and ask if you are sure, click OK
- Images will go into PACS
- Go to PACS on the top of the screen
- Click on “Group by series”
- Check mark on images to be deleted
- Go back to top and click on “Delete Images”

8) **How to link images**

If images do not link automatically, you must do it manually. Just follow these steps.

- Once in patient study, click on pencil
- Go to PACS on top of the screen
- Beside “Dicom File” click on group by series
- Scroll all the way down click on “Show more results” (as newer cases will be at the bottom)
- Find Patients name and check mark it in the box on the left
- Scroll up to find patient on the right, then check mark those boxes
- Then at the top click on “LINK IMAGES”
- Right click to go back to study
- Press F5 to refresh screen
- The number of images should appear (make sure ALL IMAGES are there)
- Switch “checked-in” to “images attached”
- Assign to radiologist