



Sonosite Synchronicity Workflow Manager

Administrator User Guide

Revision History

Date	Revision	Issue	Description
2-February-2024	C		Updated copyright.
29-November-2023	B	POCUS-187	Added note regarding separators between headings and values in custom worksheets in Creating a New Worksheet from a Template and Creating a New Worksheet from an Existing Worksheet .
		POCUS-177	Added supported characters for Exam type name field in Managing Exam Types Overview .
		POCUS-176	Updated Publish and Unpublish button references in Managing Worksheets .
		POCUS-165	Added Scheduled Reports feature. Added note indicating deleted and deactivated users are included in Education Reports in Viewing Education Reports . Added note indicating deleted and deactivated users are listed in existing credentialing programs when editing in Managing Programs .
		POCUS-164	Added Secondary Email to User profile and Editing User Profile in Managing Users .
24-May-2023	A	NA	Initial release.

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Introduction

About This Guide

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

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

Document Conventions

The document follows these conventions:

- **WARNING**  describes precautions necessary to prevent injury or loss of life
- **CAUTION**  describes precautions necessary to protect the products
- **NOTE**  provides supplemental information
- Numbered and lettered steps must be performed in a specific order.
- Bulleted lists present information in a list form but do not imply a sequence.

Getting Help

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Trademark Information

Feature	Description
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Patent: www.sonosite.com/patents

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Synchronicity Workflow Manager Overview

Sonosite Synchronicity Workflow Manager is a point-of-care ultrasound reporting system that streamlines clinical workflow, while delivering administrative efficiencies with flexible credentialing tools. It provides a comprehensive solution to the administrative challenges faced by point-of-care ultrasound physicians, enabling standardization of unique workflows both within a department and hospital-wide, which increases efficiency and time spent caring for patients.

Sonosite Synchronicity Workflow Manager provides the following:

- **Simplified workflow:** The intuitive user interface allows for a short adoption period in the hospital department and less time spent on administrative tasks. With a built-in, simple DICOM viewer, the familiar workflow tools can be used on a computer, tablet, or mobile device.
- **Focus on education:** Designed with ACEP guidelines in mind, credentialing programs can be designed to suit your requirements. The configurable worksheets for quality assurance give you flexibility in any rapidly changing environment.
- **Worksheet-driven workflow:** The built-in worksheet templates can be configured to meet your department processes, driving your standardized workflow for quality assurance, credentialing, and exam billing.
- **Scalable to your environment:** From a single clinic to a whole hospital network, Sonosite Synchronicity Workflow Manager can be scaled to meet your requirements for standardization, consistency, and compliance.
- **Shortened implementation time:** Our team, dedicated to IT solution implementations, is with you every step of the way. By understanding your needs from the beginning, your installation of Sonosite Synchronicity Workflow Manager can be completed with little interruption to you and in a time frame that suits your schedule.

Administrator Roles

The two types of administrators within Sonosite Synchronicity Workflow Manager are System Administrator and Department Administrator. The roles between the two are almost identical; however, the System Administrator has additional permissions described in the following sections:

[Managing Users](#)

[Deactivating a User Profile](#)

[Configuring Login Security](#)

[Configuring the LDAP Directory for a Single Domain](#)

[Configuring the SMTP Server](#)

[Configuring EMR Submissions](#)

[Configuring DICOM Server Connections](#)

[Configuring System Settings](#)

Managing Users and User Groups

Managing Users

In Sonosite Synchronicity Workflow Manager, you can add users two ways:

- Automatically by configuring the LDAP directory
- Manually by creating a user profile within Sonosite Synchronicity Workflow Manager

LDAP is a standards-based mechanism for interacting with directory servers. It is often used for authentication and storing information about users, groups, and applications, but an LDAP directory server is a general-purpose data store that can be configured with Sonosite Synchronicity Workflow Manager (if your organization has access to it). For information about configuring Sonosite Synchronicity Workflow Manager to work with LDAP, see [Configuring the LDAP Directory for a Single Domain](#).

The instructions for creating and editing user profiles are for those organizations that cannot connect with LDAP and need to manually create user profiles.



Note: Users must have a department and role assigned to them, or they will not have access to anything when they log in. You have to assign at least one department and role to each user.

Viewing the User Profile List

Steps

1. Click  to open the main menu.
2. Select **Department Admin** or **System Admin**, and click **Profiles**.

Creating a New User Profile

Steps

1. Click  to open the main menu.
2. Select **System Admin**, and click **Profiles**.
3. Click **Add**.
4. Enter the email address of the user in the **Email** field. If there is already a profile for the user, Sonosite Synchronicity Workflow Manager automatically populates the remaining fields.
5. Optional: Enter a secondary email address for the user in the **Secondary Email** field to receive automated email communications.
6. Select a title for the new user from the Title drop-down list box.
7. Optional: Select a prefix for the new user from the **Prefix** drop down list box.
8. Enter the first name of the user into the **First name** field.
9. Enter the last name of the user into the **Last name** field.
10. Enter the login name for the user into the **User name** field.
11. Enter the 10-digit mobile number of the user into the **Mobile Number** field.
12. Enter the badge ID of the user into the **Badge ID** field.
13. Select one of the following from the **Is this user a System Admin** field:
 - **Yes:** go to the next step.
 - **No**

- a. Select a department from the **Departments** dropdown list box.
 - b. Select one or more roles from the **Roles** dropdown list box.
 - c. To add another department, click **Add**, and repeat steps a and b.
14. If you added a secondary email address for the user, you are prompted to enter a **Verification Code**.
15. When you are finished making changes, click **FINISH**. Sonosite Synchronicity Workflow Manager generates the system password for the user after you submit the form.
- The verification code is sent to the secondary email address. Either the user or the system administrator can verify the secondary email address. If the system administrator will enter the verification code, obtain the verification code from the user and complete the following:
- a. Enter the **Secondary email verification code**.
 - b. Click **VERIFY**.
 - c. If the Secondary email verification code is expired, click **RESEND** to generate another verification code sent to the secondary email address. Then, repeat these steps to complete verification.

Editing a User Profile

Steps

1. Click  to open the main menu.
2. Select **System Admin**, and click **Profiles**.
3. Click the user profile you want to edit to display the **User profile edit** window.
4. From the **User profile edit** window, make any necessary edits.
5. When finished making changes, click **UPDATE**.

Adding a User to a Department

You can add both LDAP users and non-LDAP users to a department.

Steps

1. Click  to open the main menu.
2. Select **Department Admin** and click **Profiles**.
3. Click **Add**.
4. Enter the user's email address in the **Email** field. There should already be a profile for the user. Sonosite Synchronicity Workflow Manager automatically populates most of the remaining fields, and they are read-only.
5. Click **Add** to add a department.
6. Select a department from the **Departments** drop-down list box.
7. Select one or more roles from the **Roles** drop-down list box.
8. Click **Add**, and repeat Steps 5 and 6 to add another department.
9. When you are finished making changes, click **FINISH**.

Deactivating a User Profile



NOTE

Only System Administrators can deactivate a user profile; this control is hidden from other users.

Steps

1. Click  to open the main menu.
2. Select **Department Admin** or **System Admin**. Click **Profiles**.
3. Find the user profile you want to deactivate in the user profile list. Select the check box next to the name.
4. Click **Deactivate**. The deactivated user profile remains in the list, but is grayed out.
5. Optional: To reactivate the user profile, follow steps 1-3. Click **Activate**.

Managing User Groups

When creating user groups, make sure that each user in the group has the same role to which you are adding the group. For example, if you are creating a **QA** user group, each user must have the designated role of **QA**.

Viewing the User Group List

Steps

1. Click  to open the main menu.
2. Select **Department Admin** and click **Groups**.

Creating a New User Group

Steps

1. Click  to open the main menu.
2. Select **Department Admin** and click **Groups**.
3. Click or tap **+ Create**.
4. Enter the name of the user group in the **User group name** field. For example, EMED, or QA reviewers.
5. Select one of more users from the **Users** drop-down list.
6. Enter a description of the user group in the **User group description** field.
7. Click **CREATE** to create the new user group.

Editing a User Group

Steps

1. Search for the user group you want to modify in the **User Group** drop-down list.
2. Select the preferred group and make the required changes.
3. Click **UPDATE** to save your changes.

Deleting a User Group

Steps

1. Search for the user group you want to delete in the **User Group** drop-down list.
2. Select the preferred group and click the **trash**  icon.
3. Click **DELETE** to delete the selected group.

Resetting Studies to Unassigned Status

In some cases, studies that have been assigned to one user need to be freed for another person to use. To accommodate this requirement, administrators can use the Reset feature to reset multiple studies at once to unassigned status.



NOTE

Administrators can reset any study status, except those which are set to QA archived, Deleted, or Performing unassigned status.

Steps

1. Click **All assigned** from the Sonosite Synchronicity Workflow Manager dashboard.
2. Optional: Select any preferred filters.
3. Select the check box of each study that you want to unassign.
4. Click **Actions** at the top of the page.
5. Click **Reset** under **Studies**. The selected items are reset to **Performing unassigned** and can now be re-assigned.

Building Custom and QA Worksheets

Building Custom and QA Worksheets Overview

In Sonosite Synchronicity Workflow Manager, you can create custom worksheets in one of two ways: You can copy one of the default templates that are available in the Sonosite Synchronicity Workflow Manager application, or you can copy an existing worksheet.

- The FUJIFILM Sonosite Professional Services team will help you build worksheets for your department when they install the software.
- In addition, Sonosite Synchronicity Workflow Manager provides a QA worksheet (one per department) that can be updated based on your department needs.



NOTE

If you are updating a worksheet that is currently being used for a study, the worksheet is not updated until the next time the worksheet is selected by a user.

Related Topics

[Building Custom Worksheets](#)

[Creating a New Worksheet from a Template](#)

[Creating a New Worksheet from an Existing Worksheet](#)

[Unpublishing, Enabling, and Deleting Worksheets](#)

[Previewing QA Worksheets](#)

[Updating the QA Worksheet](#)

Custom Worksheets

Building Custom Worksheets

From the worksheet list, you can:

- View all the worksheets
- Create a worksheet from a template
- Create a worksheet from an existing worksheet
- Publish and unpublish a worksheet
- Delete a worksheet

Steps

1. Click  to open the main menu.
2. Select **Department Admin**.
3. Select **Custom worksheets** from the Department Admin dashboard.
4. Click **Sort** to sort the list and select an option.

Creating a New Worksheet from a Template

If you do not have many worksheets or want to create one that's brand new, you may want to start with a template. Starting with a template is also helpful if you only have detailed worksheets that you would have to trim down anyway.

If you want to create a worksheet based on an existing worksheet, see [Creating a New Worksheet from an Existing Worksheet](#).

Steps

1. Click  to open the main menu.
2. Select **Department Admin**.
3. Select **Custom worksheets** from the Department Admin dashboard.
4. Click **+ Create**.
5. Select **from template**.
6. Click the worksheet that is similar to the one you want to create from the list to display a preview of the worksheet.
7. Click **COPY** to display the Worksheet builder screen.
8. Enter a new name for the worksheet in the **Worksheet name** field.
9. Complete the rest of the worksheet. See **Related Topics** below for links to helpful topics.



NOTE

Add separators as needed to separate titles and descriptions from values. For example, a colon (:) separates the title from the value to be entered in "The ultrasound was performed with the following indication(s): Abdominal pain, Fever".

10. Click **FINISH** to save your changes.
11. Click **Publish** on the screen that displays to allow others to use the worksheet.
12. Optional: Click **Unpublish** on the screen that displays to keep the worksheet hidden.
13. Click **SUBMIT**.

Related Topics

[Working with Sections](#)

[Working with Questions](#)

[Adding and Removing Exams](#)

[Adding and Removing CPT Codes](#)

Creating a New Worksheet from an Existing Worksheet

If you want to make a new worksheet based on an existing one (for example, using a Cardiac worksheet to create one for eFast), you can choose to copy the Cardiac worksheet and just switch the sections around so the heart section is first instead of the abdomen. Moving sections around in a worksheet is simple and fast.

If you want to create a worksheet based on a template, see [Creating a New Worksheet from a Template](#).

Steps

1. Click  to open the main menu.
2. Select **Department Admin**.
3. Select **Custom worksheets** from the Department Admin dashboard.
4. Select the worksheet that is similar to the one you want to create from the list. A preview of the worksheet displays.
5. Click **Edit** to create a new worksheet.
6. Enter a new name for the worksheet in the **Worksheet name** field.
7. Complete the rest of the worksheet. See **Related Topics** below for links to helpful topics.



NOTE

Add separators as needed to separate titles and descriptions from values. For example, a colon (:) separates the title from the value to be entered in "The ultrasound was performed with the following indication(s): Abdominal pain, Fever".

8. Click **FINISH** to save your changes.
9. Click **Publish** on the screen that displays to allow others to use the worksheet.
10. Optional: Click **Unpublish** on the screen that displays to keep the worksheet hidden.
11. Click **SUBMIT**.

Related Topics

[Working with Sections](#)

[Working with Questions](#)

[Adding and Removing Exams](#)

[Adding and Removing CPT Codes](#)

Working with Sections

If you are updating a worksheet that is already being used for a study, it will not be updated until the next time the worksheet is selected.

Adding a New Section to a Worksheet

Steps

1. Click the **copy**  icon that corresponds to the section in the worksheet form that you want to copy.
2. Select whether you want the new section to come before or after the section you select from the section drop-down list from the **Copy it** drop-down list.
3. Click **Copy**.
4. Enter a new section name in the **Section name** field.

Editing or Delete a Section of a Worksheet

Steps

1. Revise the fields in the section, as needed in the worksheet form.
2. Click **Save**.
3. Optional: Click the **trash**  icon that corresponds to the section in the worksheet form to delete it.

Moving a Section in a Worksheet

Steps

1. Click the **move**  icon that corresponds to the section in the worksheet form that you want to move.
2. Expand the **Move it** drop-down list and select whether you want the new section to come before or after the section you select from the section drop-down list.
3. Click **Move**.

Working with Questions

Synchronicity provides multiple options for adding questions to a worksheet. This topic provides a visual preview of each option along with the steps required to create the preferred question type.

- [Adding Questions and Text to a Worksheet](#)
- [Editing or Deleting a Question](#)
- [Copying a Question](#)
- [Moving a Question to Another Part of the Worksheet](#)
- [Visual Preview of Question Types](#)

Adding Questions and Text to a Worksheet

Steps

1. Click **New Question** in the worksheet form, next to the section you want to add the question to, and select one of the following options.
2. Enter the new question in the **Enter your question** field for the question type you select.
3. Enter the preferred options in the Option choices field(s). Select any of the following for each option:
 - Use the up and down arrows   to move the options within the list.
 - Use the **Add**  icon to add another option.
 - Use the **Remove**  icon to remove an option.
4. Click **SAVE** to save your changes.

Editing or Deleting a Question

Steps

1. Click **EDIT** in the question area and make your changes.
2. Click **SAVE** to save your changes.
3. Click the trash  icon that corresponds to the question in the worksheet form to delete it.

Copying a Question

Steps

1. Click the **copy**  icon that corresponds to the question in the worksheet form that you want to copy.
2. Expand the **Copy it** drop-down list and select whether you want the new question to come before or after the question you select from the question drop-down list.
3. Enter an new question in the **Section** name field of the copied question.
4. Revise the question options as needed.

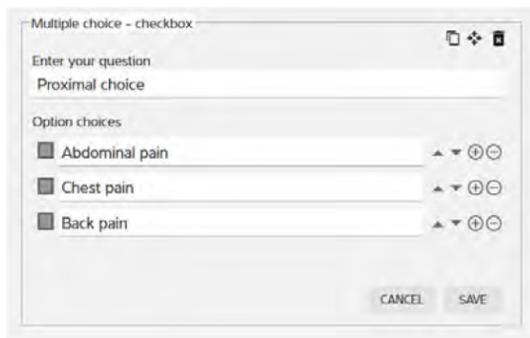
Moving a Question to Another Part of the Worksheet

Steps

1. Click the **move**  icon that corresponds to the question that you want to move.
2. Expand the **Move it** drop-down list and select whether you want the new question to come before or after the question you select from the question drop-down list.

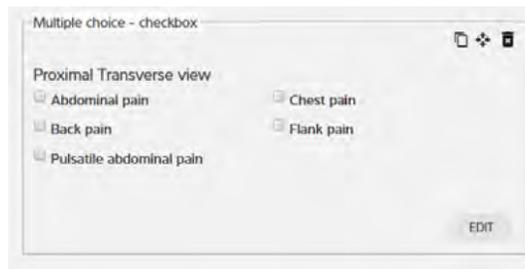
Visual Preview of Question Types

Multiple choice - check box: Adds an area for you to create a question and then check box options for the question. Users can select more than one check box for this type of question.



The screenshot shows the 'Multiple choice - checkbox' editor. It has a title bar with a close button. Below the title bar is a text input field labeled 'Enter your question' containing the text 'Proximal choice'. Underneath is a section titled 'Option choices' with three text input fields, each with a dropdown arrow and a plus/minus icon. The first field contains 'Abdominal pain', the second 'Chest pain', and the third 'Back pain'. At the bottom right are 'CANCEL' and 'SAVE' buttons.

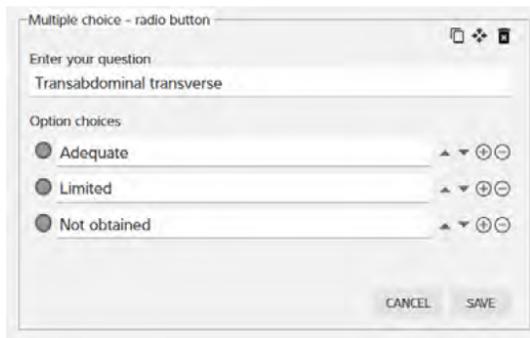
What the question options look like when you're editing



The screenshot shows the 'Multiple choice - checkbox' question as it appears in a worksheet. The question text is 'Proximal Transverse view'. There are six checkboxes arranged in two columns. The first column contains 'Abdominal pain', 'Back pain', and 'Pulsatile abdominal pain'. The second column contains 'Chest pain' and 'Flank pain'. An 'EDIT' button is located at the bottom right.

What the question options look like in the actual worksheet

Multiple choice - radio button: Adds an area for you to create a question and then radio button options for the question. Users can select only one radio button for this type of question.



The screenshot shows the 'Multiple choice - radio button' editor. It has a title bar with a close button. Below the title bar is a text input field labeled 'Enter your question' containing the text 'Transabdominal transverse'. Underneath is a section titled 'Option choices' with three text input fields, each with a dropdown arrow and a plus/minus icon. The first field contains 'Adequate', the second 'Limited', and the third 'Not obtained'. At the bottom right are 'CANCEL' and 'SAVE' buttons.

What the question options look like when you're editing



The screenshot shows the 'Multiple choice - radiobutton' question as it appears in a worksheet. The question text is 'Transabdominal transverse'. There are two radio buttons. The first is labeled 'Adequate' and is selected. The second is labeled 'Limited'. Below them is a third option, 'Not obtained', which is not a radio button. An 'EDIT' button is located at the bottom right.

What the question options look like in the actual worksheet

Multiple choice - drop-down: Adds an area for you to create a question with drop-down choices. Users can select only one option for this type of question.

What the question options look like when you're editing

What the question options look like in the actual worksheet

Input field: Adds an area for you to create a question and then provides a text field for users to answer the question.

What the question options look like when you're editing

What the question options look like in the actual worksheet

Calculation input: Adds an area for you to select a measurement option with a character limit.

What the question options look like when you're editing

What the question options look like in the actual worksheet

Text only: Adds an area for you to type a statement.



The screenshot shows a dialog box titled "Textarea" with a close button. It contains a text input field with the placeholder "Enter your question" and a larger text area below it with the placeholder "Other observations". At the bottom, there are "CANCEL" and "SAVE" buttons.

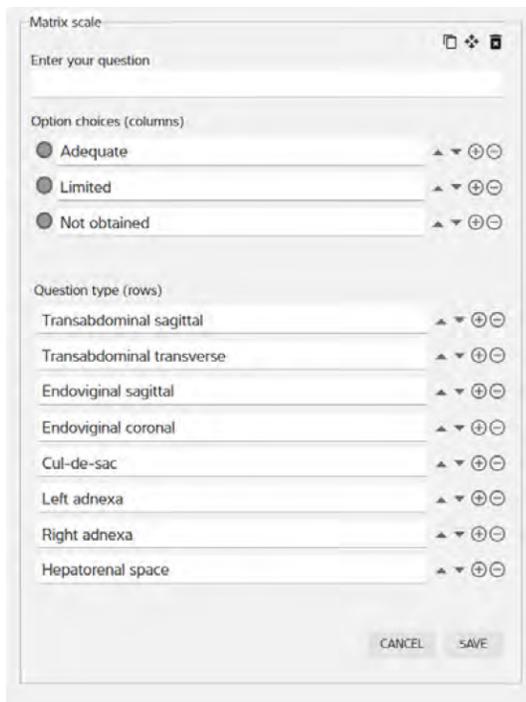
What the question options look like when you're editing



The screenshot shows the "Textarea" dialog box as it appears in the worksheet. It contains a large text area with the placeholder "Other observations" and an "EDIT" button at the bottom right.

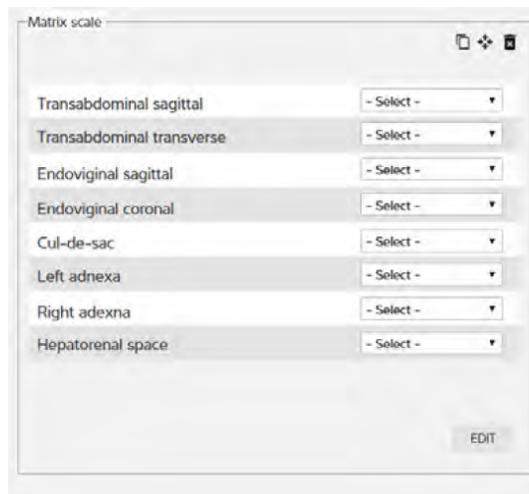
What the question options look like in the actual worksheet

Matrix scale: Adds an area for you to type a question, a list of options, and a secondary list of questions. When you save the matrix scale, the options are available in a drop-down list to all of the secondary questions.



The screenshot shows a dialog box titled "Matrix scale" with a close button. It contains a text input field for "Enter your question". Below it, there are two sections: "Option choices (columns)" with three radio buttons labeled "Adequate", "Limited", and "Not obtained"; and "Question type (rows)" with a list of anatomical terms: "Transabdominal sagittal", "Transabdominal transverse", "Endoviginal sagittal", "Endoviginal coronal", "Cul-de-sac", "Left adnexa", "Right adnexa", and "Hepatorenal space". Each row has a dropdown arrow and a plus/minus icon. At the bottom, there are "CANCEL" and "SAVE" buttons.

What the question options look like when you're editing



The screenshot shows the "Matrix scale" dialog box as it appears in the worksheet. It displays a list of anatomical terms, each followed by a "- Select -" dropdown menu: "Transabdominal sagittal", "Transabdominal transverse", "Endoviginal sagittal", "Endoviginal coronal", "Cul-de-sac", "Left adnexa", "Right adnexa", and "Hepatorenal space". An "EDIT" button is located at the bottom right.

What the question options look like in the actual worksheet

Matrix scale lateral: Like the matrix scale, adds an area for you to type a question, a list of options, and a secondary list of questions. When you save the matrix scale lateral, however, the options are available in a drop-down list for all of the secondary questions but are separated into columns labeled Right and Left.

What the question options look like when you're editing

	Right	Left
Transabdominal sagittal	- Select -	- Select -
Transabdominal transverse	- Select -	- Select -
Endoviginal sagittal	- Select -	- Select -
Endoviginal coronal	- Select -	- Select -
Cul-de-sac	- Select -	- Select -
Left adnexa	- Select -	- Select -
Right adnexa	- Select -	- Select -
Hepatorenal space	- Select -	- Select -

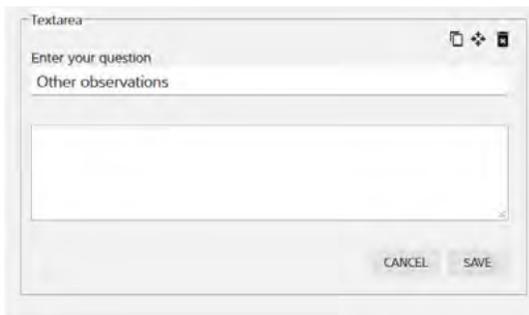
What the question options look like in the actual worksheet

Conditional question: Adds a section for a conditional question with primary options and also an optional conditional statement to one of your primary options.

What the question options look like when you're editing

What the question options look like in the actual worksheet

Text area: Adds an area for you to create a question and then provides a field for you to prompt users about how answer the question.



What the question options look like when you're editing



What the question options look like in the actual worksheet

Adding and Removing Exams

You must add at least one predefined exams to a worksheet while creating or editing a new worksheet; however, you can only add those exams that have already been created in Sonosite Synchronicity Workflow Manager. When creating or editing an exam type, you can also associate the exam with existing worksheets. For more information about creating exam types and associating them with worksheets, see [Managing Exam Types](#).

While creating a worksheet, you can also remove the exam types you do not want associated with a worksheet. This comes in handy when you're copying a worksheet from an existing template or worksheet and do not need that particular exam type. When you remove an exam type from a worksheet, it only removes the association to that worksheet; it does not remove the exam type altogether.

Steps

1. Click an empty part of the box in the worksheet under **Exam type**.
2. Select an exam type from the drop-down list. The exam type displays in the box.
3. To remove an exam, under **Exam type**, click the **x** in the exam type you would like to remove. The exam type no longer displays.

Adding and Removing CPT Codes

You can add predefined CPT codes to a worksheet while creating or editing a new worksheet; however, you can only add those CPT codes that have already been created in Sonosite Synchronicity Workflow Manager. When creating or editing a CPT code, you can also associate it with existing worksheets. For more information about creating CPT codes and associating them with worksheets, see [Managing CPT Codes](#).

While creating a worksheet, you can also remove those CPT codes you do not want associated with a worksheet. This comes in handy when you're copying a worksheet from an existing template or worksheet and do not need that particular CPT code. When you remove a CPT code from a worksheet, it only removes the association to that worksheet; it does not remove the CPT code altogether.

Steps

1. Click an empty part of the box in the worksheet under **CPT code(s)**.
2. Select a CPT code from the drop-down list. The CPT code displays in the box.
3. To remove a CPT code, in the worksheet under CPT code, click the **x** in the CPT code you would like to remove. The CPT code no longer displays.



NOTE

Synchronicity adds all modifiers associated with the CPT code.

Managing Worksheets

Managing Worksheets Overview

Publishing a worksheet makes the worksheet available to users. If you need to make changes to an existing worksheet and do not want it to be available for users, you can unpublish the worksheet.

Published worksheets display with black text in the list of worksheets. Unpublished worksheets display with gray text in the list of worksheets.

Finally, you can delete a worksheet. If you try to delete or unpublish a worksheet which is

- currently in use, the worksheet will be available until the study ends.
- part of a credentialing program that is not yet completed, you will not be able to do so until the credentialing program is completed.

From the worksheet list, do one of the following:

- To unpublish a worksheet, click the check box of the worksheet you would like to make unavailable to users. Click **Unpublish** to make the worksheet unavailable .
- To publish a worksheet, click the check box of the worksheet you would like to make available to users. Click **Publish** to make the worksheet available.
- To delete a worksheet, click the check box of the worksheet you would like to delete. Click **Delete**. The worksheet no longer displays in the list.

QA Worksheets

Previewing QA Worksheets

You can choose a version of the QA worksheet to preview:

- If there haven't been any changes to the QA worksheet, the factory default (ACEP) version displays.
- If there has been an update to the factory default version, from the View versions drop-down list, select the version you want to preview based on the date and time stamp.

Steps

1. Click  to open the main menu.
2. Select **Department Admin**.
3. Click **QA worksheet**.

Related Topics

[Building Custom and QA Worksheets Overview](#)

Updating the QA Worksheet

You can add, edit, move, and delete questions from a QA Worksheet. Start with these two steps and then select the preferred action:

1. Click **Edit** from the QA worksheet preview page.
2. Select the **Custom** radio button.
 - [Adding a Question](#)
 - [Editing or Deleting a Question](#)
 - [Copying a Question](#)
 - [Moving a Question to Another Part of the Worksheet](#)
 - [Resetting the QA Worksheet Back to the ACEP Version](#)

Adding a Question

1. Click **New Question**. From the drop-down list, choose the type of question or text you want to add.
2. Enter the new question in the **Enter your question** field for each new question.
3. Enter the options in the **Option choices** field(s). For each option, you can click any of the following:
 - Up and down ▲▼ arrows to move the options within the list
 - Add ⊕ icon to add another option
 - Remove ⊖ icon to remove an option
4. After completing the question and options, you can add another question or click **SAVE**.

Editing or Deleting a Question

1. Click **EDIT** in the question area. Make your changes.
2. Click **SAVE** when you are finished.
3. To delete a question, click the **trash**  icon in the worksheet form next to the question you want to delete.

Copying a Question

1. Click the **copy**  icon in the worksheet form next to a question.
2. Expand the **Copy it** drop-down list, and select whether you want the new question to come before or after the question you select from the question drop-down list.
3. Enter a question in the **Section name** field of the copied question.
4. Optional: Revise the question options as needed.

Moving a Question to Another Part of the Worksheet

1. Click the **move**  icon in the worksheet form next to the question you want to move.
2. From the **Move it** drop-down list, select whether you want the new question to come before or after the question you select from the section drop-down list.

Resetting the QA Worksheet Back to the ACEP Version

1. Click **Edit** from the QA worksheet preview page.
2. Select the **ACEP** radio button.
3. Click **FINISH**. The current version is now ACEP.

Managing CPT Codes

Managing CPT Codes

The American Medical Association (AMA) has a standardized list of Current Procedural Terminology (CPT) codes and modifiers that the Sonosite Synchronicity Workflow Manager uses for billing medical diagnostic services and procedures.

Sonosite Synchronicity Workflow Manager allows for the addition of modifiers to CPT codes to show that a procedure code has been altered. One or more modifiers can be added to the CPT code configuration.

- [Viewing the CPT Code List](#)
- [Creating a New CPT Code](#)
- [Editing a CPT Code](#)
- [Deleting a CPT Code](#)
- [Canceling a CPT Code](#)

Steps

Viewing the CPT Code List

1. Click  to open the main menu.
2. Select **Department Admin** and click **CPT codes**.
3. Optional: Click **Sort** and select an option.

Creating a New CPT Code



NOTE

There is no limit to the number of modifiers you can add to a CPT code.

Steps

1. Click  to open the main menu.
2. Select **Department Admin** and click **CPT codes**.
3. Click **New**.
4. Enter the CPT code number in the **CPT code number** field.
5. Enter a short description of the CPT code in the **Short description** field.
6. Enter a detailed description of the CPT code in the **Full description** field.
7. Select one or more worksheets from the **Associated worksheet** drop-down list.
8. Click **Add Modifiers** (if the associated CPT code requires it).
9. Enter the modifier number in the **Modifier number** field.
10. Enter a detailed description of the CPT code modifier in the **Description** field.
11. Click **FINISH**.

Editing a CPT Code

Steps

1. Click  to open the main menu.
2. Select **Department Admin** and click **CPT codes**.
3. Click to select the CPT code to edit from the CPT code list.

4. Click **UPDATE** to save your changes when you are finished.
5. Click **UPDATE** when prompted to confirm the update.

Deleting a CPT Code

Steps

1. Click  to open the main menu.
2. Select **Department Admin** and click **CPT codes**.
3. Click the **trash**  icon associated with the CPT code you want to delete.
4. Click **DELETE** when prompted.

Canceling a CPT Code

When creating a CPT code, you can cancel it at any time.

Steps

1. Click the cancel  icon at any time during the CPT code creation process.
2. Click **DISCARD CHANGES** when prompted.

Managing Exam Types

Managing Exam Types

Sonosite Synchronicity Workflow Manager allows for multiple exam types. Different modalities and tags can be added to a single exam type.

Viewing the Exam Type List

Steps

1. Click  to open the main menu.
2. Select **Department Admin** and click **Exam types**.
3. Click one of the heading titles (for example, Exam type names or Exam type description) to reorder the list of exam types alphabetically either ascending (a to z) or descending (z to a).

Creating a New Exam Type

Steps

1. Click  to open the main menu.
2. Select **Department Admin** and click **Exam Types**.
3. Click **New**.
4. Enter the name of the exam type in the **Exam type name** field. Supported characters include forward (/) and backward (\) slashes, uppercase (A-Z) and lowercase (a-z) letters, and spaces.
5. Enter a description of the exam type in the **Exam type description** field.
6. Enter the modality and click the **add**  icon in the **Exam name from modality** field. You can add one or more modalities.
7. Enter the tag and click the **add**  icon in the **Tags for exam type** field. You can add one or more tags.
8. Click **SAVE**.

Modifying an Exam Type



NOTE

- You can modify all fields except the **Exam Type Name**.
- Any changes you make will not impact studies that are in progress; the changes only pertain to new studies.

Steps

1. Click  to open the main menu.
2. Select **Department Admin** and click **Exam Types**.
3. Click the drop-down arrow under the **Action** column of the exam type, and select **View/Modify**.
4. Make the required changes, and click **MODIFY**.

Disabling Custom Exam Types

Although Sonosite Synchronicity Workflow Manager provides a set of default exam types that cannot be disabled or deleted, administrators can disable or delete any custom exam type.

Steps

1. Click  to open the main menu.
2. Select **Department Admin** and click **Exam Types**.
3. Click the drop-down arrow under the **Action** column and select **Disable**.
4. Click **YES** when prompted.

Deleting Custom Exam Types

Steps

1. Search the **Exam Type** list for the exam type you want to delete.
2. Click the drop-down arrow under the **Action** column and select **Delete**.
3. Click **YES** when prompted.

Managing a Credentialing Program

Managing a Credentialing Program Overview

Sonosite Synchronicity Workflow Manager offers your organization a way to create credentialing programs for students: Either new residents or clinicians needing to be re-credentialed can be part of the program.

Think of a credentialing program as a course with a start and finish date. The curriculum is made up of the required worksheets.

A credentialing program is administered by:

- The Department Administrator who creates and maintains the program
- Attending clinicians who sign off on the studies (and determine if the study is sent to EMR)
- QA reviewers who evaluate and assign credits to each study

The Department Administrator Role

For Department Administrators, use Sonosite Synchronicity Workflow Manager to do any of the following:

- Create and manage credentialing programs within your organization
- View programs at either a high-level or detailed view
- Track student credits
- Look at a program to see how quickly students are going through it; for example, who's finished, who's on time, and who's late
- Use reports to review how students are progressing through the different programs

For students, Sonosite Synchronicity Workflow Manager lets them see their scores in a program and how many worksheets they have left to complete. For more information, refer to the Sonosite Synchronicity Workflow Manager Clinical User Guide.

Related Topics

[Administrator Credentialing Program Process](#)

[Creating a New Program](#)

[Managing Programs](#)

Administrator Credentialing Program Process

As an Administrator, complete the following steps to manage credentialing programs.

1. Create a credentialing program, adding appropriate start/end dates, worksheets, clinicians (students), QA reviewers, and attending clinicians.
2. Publish the newly created program, so it automatically begins on the indicated start date.
 - Students can now perform the assigned study and decide whether or not to submit to EMR.
 - The Attending signs and approves or declines submissions to EMR.
 - QA reviews and gives credit/no credit.
 - For a consolidated view, administrators can track the list of department programs and sort the list according to criteria.
 - The program concludes on the indicated end date.



NOTE

- The default view of the program list displays programs that are not started, in progress, and unpublished.
- Select the **Completed** check box to display completed programs.

Related Topics

[Managing a Credentialing Program Overview](#)

Creating a New Program

Before creating a new credentialing program, it's a good idea to first create the user groups for your department; that way, you can add the appropriate group of users (such as second-year students or QA reviewers) instead of adding each user to the program individually.

- When creating and editing a program, you can save the program by clicking the **save** icon . If you haven't completed the required fields, you are prompted to do so.
- You can also click the **cancel** icon  to discard your changes and exit the program page.



NOTE

- Every user in the user group must have the same role assigned to them as the user group being added to the program.
- The **End** date field can be left blank for open-ended programs.
- The **Attending** role is optional in a program.

Steps

1. Click  to open the main menu.
2. Select **Department Admin** and click **Credentialing**.
3. Click **New**.
4. Enter a name for the program in the **Name** field under **Program Details**.
5. Select the program start date from the **Start date** drop-down calendar.
6. Select the program end date from the **End date** drop-down calendar.
7. Select the worksheet type from the **Select worksheet** drop-down list in the **Worksheets** section.
8. Enter the required number of worksheets for each worksheet type in the **Credit** field.
9. Click to select one or more students and/or user groups from the **Students** drop-down list in the **Roles** section.
10. Click to select one or more attending clinicians and/or user groups in the **Attending** drop-down list.
11. Click to select one or more quality assurance reviewers and/or user groups in the **QA/Reviewer** drop-down list.
12. Click **FINISH**.
13. Do one of the following:

If you want to do this ...	Complete these steps ...
Add the finished program to the program list.	Select Publish , and then click SUBMIT .
Save the program to the list without making it visible to anyone but you. Note: Selecting Unpublish saves the program to the list, but it will only be viewable to you, as the Administrator. You can go back later and publish the program when you're ready for users to view it.	Select Unpublish , and then click SUBMIT .

Related Topics

[Managing a Credentialing Program Overview](#)

Managing Programs

You can modify an existing program in any of the following ways:

[Editing a Program](#)

[Previewing a Program](#)

[Disabling and Enabling a Program](#)

[Deleting a Program](#)

Editing a Program



NOTE

Deleted and deactivated users are listed in the credentialing program edit page, but are not available in the user list.

Steps

1. Click  to open the main menu.
2. Select **Department Admin** and click **Credentialing**.
3. Select the credentialing program. C
4. Make the required changes and click **FINISH**.
5. Do one of the following:

If you want to do this ...	Complete these steps ...
Add the finished program to the program list	Select Publish , and then click SUBMIT
Save the program to the list without making it visible to anyone but you	Select Unpublish , and then click SUBMIT
Note: Selecting Unpublish saves the program to the list, but it will only be viewable to you, as the Administrator. You can go back later and publish the program when you're ready for users to view it.	

Previewing a Program

Steps

1. Click  to open the main menu.
2. Select **Department Admin** and click **Credentialing**.
3. Click the name of the program you want to preview from the **program** list.

Disabling and Enabling a Program

Steps

1. To disable a program: Select the program from the **program study list** and click **Disable**.
2. To enable a previously disabled program: Select the program from the **program study list** and click the **disable** icon  next to the program name. You can enable programs:
 - Before the start date
 - After the start date, but before the end date

- If the program is still in draft form

Deleting a Program

Steps

1. Click  to open the main menu.
2. Select **Department Admin** and click **Credentialing**.
3. Select the check box that corresponds to the program you want to delete.
4. Click **Delete**.

Related Topics

[Managing a Credentialing Program Overview](#)

Reporting

Reporting Overview

The reporting feature in the Sonosite Synchronicity Workflow Manager lets you view various kinds of reports:

- Administrative reports give an overview of departmental operational trends, such as the number of studies performed, percentages of those studies submitted to EMR, and the number of studies that are taking too long to work their way through the Sonosite Synchronicity Workflow Manager.
- Standard reports provide a collection of predefined data analytics report templates to perform physician benchmarking reports and department benchmarking reports. These reports include individual key metrics, study completion status, study counts, and more.
- Educational reports provide a summary of student activity for a credentialing program. This type of report includes the number of worksheets completed, program due date, percent of credits completed, image quality of studies, accuracy of interpretation, and gold standard percentage.

Related Topics

[Viewing Administrative Reports](#)

[Viewing Standard Reports](#)

[Viewing Educational Reports](#)

[Sending and Exporting Reports](#)

See Also

[Scheduling Reports Overview](#)

Viewing Administrative Reports

Steps

1. Click  to open the main menu.
 2. Select **Report**.
 3. Click the **Administrative reports** tab in the upper left corner of the screen.
 4. Select the type of report you want to view from the **Report by** drop-down list:
- **Time** adjusts the report timeframe either by using the slider to set between 1 month and 5 years, or by entering a custom calendar date range.
 - **Worksheet** plots the number of each type of worksheet.
 - **Provider** plots the number of worksheets entered by each user.
 - **Exam Type** plots the number of worksheets that use each exam type.

Applying Activity Indicators to an Administrative Report



NOTE

If you have changed the ageout threshold setting from its default 48-hour value, the check box label will reflect that change. For more information about configuring administrative report settings, see [Configuring Administrative Report Settings](#).

Steps

1. Select **Submitted to EMR** to overlay the number of worksheets that have been submitted to EMR for billing.
2. Select **>48hrs** to overlay the number of studies that are taking too long to work their way through the Sonosite Synchronicity Workflow Manager.
3. Select **QA Archived** to overlay the number of worksheets that have been approved by QA.

Filtering an Administrative Report

You can apply filters to customize your standard reports. The following filter options are available in the Refine by pane on the left side of the Standard reports screen.

Steps

1. Use **Date range** to specify the timeframe for your report. Choose one of following options to select your date range:
 - Enter the preferred start and end dates for your report into the **date range** field  using the format **YYYY-MM-DD**.
 - Click in the **date range** field  and select your report's start date in the calendar on the left. Select the end date from the calendar on the right and click **Apply**.
 - Select a period of time by clicking **Slider**, then moving the slider button along the timeline to adjust the amount of historical data you want to include. For example, move the slider to 12 months if you want to display data from 12 months ago up to today. In this mode, you can click **Custom** to switch back to using the calendar view.
2. Use **Worksheets** to specify which worksheets you want included in your report by clicking in the Worksheets field and selecting each worksheet you want to include.
3. Use **Provider** to specify which people you want included in your report by clicking in the Provider field and selecting each person you want to include.

4. Use **Exam types** to specify which exam types you want included in your report by clicking in the Exam types field and selecting each exam type you want to include.
5. Use **Study type** to specify whether clinical studies or educational studies should be included in your report by selecting **Clinical** or **Educational**.
6. Select **User options** to include deactivated users in the report. Your report will provide updated information about any filter settings below the graph, indicating what date range, providers, study types, worksheets, and exam types are included in the report.
7. To save your filter settings for future use, do the following:
 - Click **SAVE**, enter a unique filter name in the Save filter dialog.
 - Click **ADD** to save it. Your newly saved filter displays in the Refine by drop-down list.



NOTE

- You must use a unique name for your saved filter; entering the name of an existing filter will result in an error.
- If you want to rename a filter, first delete the old filter, then create and save a new version of the filter.

Related Topics

[Reporting Overview](#)

Viewing Standard Reports

Steps

1. Click  to open the main menu.
2. Select **Report**.
3. Click **Standard Reports** in the upper left corner of the screen.

Filtering a Standard Report

You can apply filters to customize your standard reports. The following filter options are available in the **Refine by** pane on the left side of the Standard Reports screen.

Steps

1. Use **Date range** to specify the timeframe for your report. Choose one of following options to select your date range:
 - Enter the preferred start and end dates for your report into the **Date range** field  using the format *YYYY-MM-DD*.
 - Click in the **Date range** field  and select the start date of the report in the calendar on the left. Select the end date from the calendar on the right. Click **Apply**.
 - Select a period of time by clicking the **Slider**. Move the slider button along the timeline to adjust the amount of historical data you want to include. For example, move the slider to 12 months if you want to display data from the previous 12 months to the present. In this mode, you can click **Custom** to switch back to using the calendar view.
2. Use **Report Type** to specify which query report title you want to generate a report.
3. To include deactivated users in the query results report, click the **User Options Include Deactivated** check box.

Related Topics

[Reporting Overview](#)

Viewing Educational Reports

Steps

1. Click  to open the main menu.
2. Select **Report**.
3. Click the preferred program's **VIEW DETAILS** button to view the following details of a specific program:
 - Program due date
 - Number, type, quality and percentage of completed worksheets
 - Student progress for each type of worksheet



NOTE

For version 1.3.2 and later, deleted and deactivated users are included in Education Reports, but are grayed out in the program details page.

Related Topics

[Reporting Overview](#)

Sending and Exporting Reports

You can choose to have report summaries either sent to your email or exported to a CSV (Comma Separated Values) file.

Emailing Reports

1. Click the **more** ●●● icon at the right side of the preferred report on the report page.
2. Click **Email report**. A copy of the report is sent to your email address.



NOTE

Sending an email report does not affect any scheduled email notification you configure for educational reports.

Scheduling Automatic Email Notifications for Educational Reports

Educational reports offer an additional email feature: you can schedule the Sonosite Synchronicity Workflow Manager to automatically send email notifications on a periodic basis.

Steps

1. Click the preferred program's Email notifications button from the **Educational Reports** page. The button turns green and displays **Yes**.
2. When prompted, select a notification frequency:
 - **Weekly once Monday 8am** starts on the next Monday at 8:00 AM.
 - **Every two weeks Monday 8am** starts on the first and third Mondays at 8:00 AM.
 - **Monthly once Monday 8am** starts on the first Monday of every month at 8:00 AM.
3. Click **Done**.
4. Click the **Email notifications** button to the left to turn off automatic email notifications, from the report page. The green color on the button disappears and displays **No**.

Optional Steps

As an option, you can follow this optional procedure to change the frequency of existing email notifications.

1. Click the edit button under the preferred program's Email notifications button in the report page.
2. Click to select the preferred notification frequency.

Exporting Reports to CSV

1. Click the **more** ●●● icon at the right side of the preferred report on the report page.
2. Click **Export to csv**.

Related Topics

[Reporting Overview](#)

Configuring IT Settings

Configuring Login Security

Users must log in with the system-generated password within 72 hours of it being generated to change their password, or they will be redirected to request a new system-generated password.

Steps

1. Click  to open the main menu.
2. Select **System Admin** and click **Password Configuration**.
3. Select a minimum of three password complexity requirement under **Password Complexity**.
4. Enter the number of days before a password expires in the **User defined password expires in (days)** field.
5. Enter the number of times users are allowed to reuse a password in the **History of password reuse restriction count** field.
6. Enter the number of times users are allowed to attempt entering a password unsuccessfully before they are locked out of the system in the **Account Lock-Out threshold (unsuccessful attempts)** field.
7. Click **Save**.
8. Click one of the following to reset the login security configuration:
 - **Reset** to change back to the previously saved settings
 - **Reset To Default** to change back to the default settings

Related Topics

[Configuring the SMTP Server](#)

[Configuring the LDAP Directory for a Single Domain](#)

[Configuring Multi-Factor Authentication](#)

[Configuring EMR Submissions](#)

[Configuring DICOM Server Connections](#)

[Configuring System Settings](#)

[Configuring Administrative Report Settings](#)

Configuring the SMTP Server

Steps

1. Click  to open the main menu.
2. Select **System Admin** and click **SMTP Configuration**.
3. Enter the server address in the **SMTP Server** field.
4. Enter the port number in the **SMTP Port** field.
5. Enter the address (for example, DoNotReply@TBD.com) in the **From Address** field.
6. Select **Yes** or **No** from the **Enable Authentication** drop-down list.
7. Select either **Yes** or **No** from the **Enable SSL** options.
8. Enter the authenticated SMTP username in the **Authenticate Username** field.
9. Click **Save**.
10. Optional: Click **Reset** to revert to the previously saved data.

Related Topics

[Configuring Login Security](#)

[Configuring the LDAP Directory for a Single Domain](#)

[Configuring Multi-Factor Authentication](#)

[Configuring EMR Submissions](#)

[Configuring DICOM Server Connections](#)

[Configuring System Settings](#)

[Configuring Administrative Report Settings](#)

Configuring the LDAP Directory for a Single Domain

The System Administrator maintains the LDAP accounts. If the System Administrator deletes or deactivates an account, the user will no longer have access to the Sonosite Synchronicity Workflow Manager.

Steps

1. Click  to open the main menu.
2. Select **System Admin** and click **LDAP Configuration**.
3. Select the directory type from the **Type** drop-down list.
4. Select **Simple** if you are supporting only one domain in the **Authentication** field.
5. Enter the address of the remote server in the **Remote server FQDN (Separated by;)** field.
6. Enter the groups that should have access in the **Access Groups** field.
7. Enter the path to the system root directory in the **Search Root** field.
8. Enter the port number of the LDAP directory in the **LDAP Port** field.
9. Select the **Secured** check box to use Secure Sockets Layer (SSL)/Transport Layer Security (TLS) technology to encrypt your LDAP traffic that is transmitted between the Sonosite Synchronicity Workflow Manager and your LDAP directory.
10. Enter the Distinguished Name of the user directory that you want to search in the **User DN** field.
11. Enter the Distinguished Name of the manager directory that you want to search in the **Manager DN** field.
12. Enter the manager's password in the **Manager Password** field.
13. Enter the name of the System Administrator in the **IT Admin User Name** field.
14. Click **Test Connection**.



NOTE

A message displays letting you know if the connection succeeds or fails. If the connection fails, it may be because the active directory is down, data entered is incorrect or there is a network issue.

15. Click **OK** when prompted.
16. Optional: if the connection fails, check to make sure all the fields are correct, or try again later to see if the server was down and couldn't connect.
17. Optional: click **OK** when prompted if the connection succeeds.
18. Click **SAVE & SYNCHRONIZE**.

Related Topics

[Configuring the LDAP Directory for Multiple Domains](#)

[Configuring Login Security](#)

[Configuring the SMTP Server](#)

[Configuring Multi-Factor Authentication](#)

[Configuring EMR Submissions](#)

[Configuring DICOM Server Connections](#)

[Configuring System Settings](#)

[Configuring Administrative Report Settings](#)

Configuring the LDAP Directory for Multiple Domains

In some cases, clients have their users logging into Synchronicity using LDAP. Administrations using LDAP for Synchronicity login will establish a trust relationship, create an access group and add all users to that group. This configuration ensures that all intended users from multiple domains are able to successfully log into Synchronicity.

LDAP/AD configuration

Type*	<input type="text" value="Choose DirectoryType"/>
Authentication Type*	<input type="text" value="Simple"/>
Remote servers FQDN (Separated by ;)	<input type="text"/>
LDAP port	<input type="text"/> <input checked="" type="checkbox"/> Secured
Access groups	<input type="text"/>
Search root	<input type="text"/>
User DN	<input type="text"/>
Manager DN	<input type="text"/>
Manager password	<input type="password" value="....."/>
IT Admin user name	<input type="text" value="syncadmin"/>



NOTE

- The LDAP/ AD configuration page includes two new options: **Authentication Type**, and the **FQDN (Separated by;)** option, which provides the ability to configure multiple remote servers in the Remote servers FQDN field.
- You must establish the trust relationship between domains prior to creating an access group (and adding users to it).
- As the System Administrator, you must include yourself in the access group you create, otherwise the connection will continue to fail.

Steps

1. Click  to open the main menu.
2. Select **System Admin** and click **LDAP Configuration**.
3. Select the directory type from the **Type** drop-down list.
4. Select **Kerberos** if you are supporting multiple domains in the **Authentication** field.
5. Enter the address(es) of the remote server(s) in the **Remote server FXDN (Separated by;)** field.
6. Enter the groups to have access in the **Access Groups** field.
7. Enter the path to the system root directory in the **Search Root** field.
8. Enter the port number of the LDAP directory in the **LDAP Port** field.
9. Select the **Secured** check box to use Secure Sockets Layer (SSL)/Transport Layer Security (TLS) technology to encrypt your LDAP traffic that is transmitted between the Sonosite Synchronicity Workflow Manager and your LDAP directory.
10. Enter the Distinguished Name of the user directory that you want to search in the **User DN** field.
11. Enter the Distinguished Name of the manager directory that you want to search in the **Manager DN** field.
12. Enter the manager's password in the **Manager Password** field.

13. Enter the name of the System Administrator in the **IT Admin User Name** field.
14. Click **Test Connection**.



NOTE

A message displays if the connection succeeds or fails. If the connection fails, it might be because the active directory is down, data entered is incorrect, you are not a member of the designated access group, or there is a network issue.

15. Click **OK** when prompted.
16. Optional: if the connection fails, check to make sure all the fields are correct, or try again later to see if the server was down and couldn't connect.
17. Optional: click **OK** when prompted if the connection succeeds.
18. Click **SAVE & SYNCHRONIZE**.

Related Topics

[Configuring the LDAP Directory for a Single Domain](#)

[Configuring Login Security](#)

[Configuring the SMTP Server](#)

[Configuring Multi-Factor Authentication](#)

[Configuring EMR Submissions](#)

[Configuring DICOM Server Connections](#)

[Configuring System Settings](#)

[Configuring Administrative Report Settings](#)

Configuring Multi-Factor Authentication

Steps

1. Click  to open the main menu.
2. Select **System Admin** and click **Multi-Factor Authentication**.
3. Select **Email** in the **Type** field to have the system email the MFA code to the user.
4. Select **Expire Time (Minutes)** and then enter the number of minutes users will have to enter the authentication code that is emailed to them before the code expires.
5. Click **Save** to save changes.
6. Click **Cancel** if you want to cancel your changes.
7. Optional: Select **None** in the **Type** field and click **Save** to disable multi-factor authentication.

Related Topics

[Configuring Login Security](#)

[Configuring the SMTP Server](#)

[Configuring the LDAP Directory for a Single Domain](#)

[Configuring EMR Submissions](#)

[Configuring DICOM Server Connections](#)

[Configuring System Settings](#)

[Configuring Administrative Report Settings](#)

Configuring EMR Submissions

You can send study reports by either HL7 or EDMS mode:

- In HL7 mode, you have the option of embedding a PDF with the study reports. The Sonosite Synchronicity Workflow Manager sends the department study reports in HL7 message format through the selected channel.
- In EDMS mode, the Sonosite Synchronicity Workflow Manager submits the department study reports in PDF format only.

Steps

1. Click  to open the main menu.
2. Select **System Admin** and click **EMR Configuration**.
3. Select one the following from the **Message Mode** drop-down list:

HL7

- Select the **Embedded PDF** check box if you would like to send an embedded PDF with the HL7 message. If not, leave the box clear.
- Select a channel from the **Channel** drop-down list box .
- Enter the name of the receiving facility in the **Receiving Facility** field.
- Enter the name of the server IP address or host name in the **Host Name** field.
- Enter the port number in the **Port** field.
- Enter the name of the facility's IT Administrator in the **User Name** field.
- Enter the password of the facility's IT Administrator in the **Password** field.
- Enter the path for outbound mail in the **Share Path** field.
- Enter the name of the receiving facility in the **Receiving Facility** field.
- Enter the name of the server connected to the network in the **Host Name** field.
- Enter the name of the receiving application in the **Receiving Application** field.
- Select the date format for EMR submissions from the **Date Format** list box.
- Click **SAVE**.

EDMS

- Select a channel from the **Channel** drop-down list.



NOTE

If you select **NETWORKSHARE** as the channel, complete the smaller subset of the fields mentioned below.

- Enter the name of the server IP address or host name in the **Host Name** field.
- Enter the port number in the **Port** field.
- Enter the name of the facility's IT Administrator in the **User Name** field.
- Enter the password of the facility's IT Administrator in the **Password** field.
- Enter the path for outbound mail in the **Share Path** field.
- Select the date format for EMR submissions from the **Date Format** list box.
- Click **SAVE**.

4. Optional: Click **Reset** to revert to the previously saved data.

Related Topics

[Configuring Login Security](#)

[Configuring the SMTP Server](#)

[Configuring the LDAP Directory for a Single Domain](#)

[Configuring Multi-Factor Authentication](#)

[Configuring DICOM Server Connections](#)

[Configuring System Settings](#)

[Configuring Administrative Report Settings](#)

Configuring DICOM Server Connections

Steps

1. Click  to open the main menu.
2. Select **System Admin** and click **DICOM Server Configuration**.
3. For each configuration, set the following fields:
 - **Configuration name** is a unique network name for the configuration.
 - **Entity** refers to the application entity (typically, a client) that uses the DICOM network service.
 - **Called AE Title** refers to the DICOM Application Entity Title that was called.
 - **IP Address** is the unique identifier to send data to the network.
 - **Port** is the device port number. IP port 104 is typically assigned for DICOM.
 - **Calling AE Title** refers to the DICOM Application Entity Title that is calling.
4. Click **SAVE**.

Related Topics

[Configuring Login Security](#)

[Configuring the SMTP Server](#)

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[Configuring EMR Submissions](#)

[Configuring System Settings](#)

[Configuring Administrative Report Settings](#)

Configuring System Settings

Configuring the DICOM Auto-archive Frequency

Steps

1. Click  to open the main menu.
2. Select **System Admin** and click **Settings**.
3. Select the length of time between automatic archives from the **Dicom Auto-Archive Frequency** drop-down list.
4. Click **SAVE**.

Configuring System User Notifications

Steps

1. Click  to open the main menu.
2. Select **System Admin** and click **Settings**.
3. Click **Enable** next to **System User Notification**.
4. Enter the message you want to appear whenever a user signs in to the system in the text field.
5. Click **SAVE**.

Related Topics

[Configuring Login Security](#)

[Configuring the SMTP Server](#)

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[Configuring Multi-Factor Authentication](#)

[Configuring EMR Submissions](#)

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[Configuring Administrative Report Settings](#)

Configuring Administrative Report Settings

Department administrators can customize the following settings for their department's unique requirements.

Configuring the Study Ageout Threshold

Department administrators can have the Sonosite Synchronicity Workflow Manager automatically flag studies that are taking too long to work their way through the system. Each department can specify how much time they want to allow before the system flags a study as aging.



NOTE

- The default ageout threshold is 48 hours. Changing this value will be reflected in the Administrative reports screen's >XXhrs check box (where **XX** is the new value). For more information about using this activity overlay in an administrative report, see [Viewing Administrative Reports](#).
- You must sign out of the Sonosite Synchronicity Workflow Manager for the system to apply the change to the ageout threshold value. Navigating away from this control without logging out will cancel any update.

Steps

1. Click  to open the main menu.
2. Select **Department Admin** and click **Settings**.
3. Enter the amount of time for a study to be flagged as aging in the **Study ageout threshold (In hours)** field.
4. Click **SAVE**.
5. Log out of the system. The system applies the new ageout threshold value.

Configuring Accession Number Settings

Steps

1. Click  to open the main menu.
2. Select **Department Admin** and click **Settings**.
3. Use **Order preference** to specify whether studies in your department require an accession number when they are submitted to the EMR:
 - Select **Yes** if your department uses an order-based workflow.
 - Select **No** if your department uses an encounter-based workflow.
4. Click **SAVE**.

Related Topics

[Configuring Login Security](#)

[Configuring the SMTP Server](#)

[Configuring the LDAP Directory for a Single Domain](#)

[Configuring Multi-Factor Authentication](#)

[Configuring EMR Submissions](#)

[Configuring DICOM Server Connections](#)

[Configuring System Settings](#)

IT Network

IT Network

Data Backup

- Perform data backups regularly as part of your organization's disaster recovery plan. Doing so will help ensure proper system operation and data integrity. FUJIFILM Sonosite recommends that you allow only the authorized system administrator to back up and restore ePHI, audit log, and system configurable data.
- Keep data backups on modern types of media to ensure data is not lost due to technology obsolescence.

Security and Privacy

The security and privacy-related configurable controls in the Sonosite Synchronicity Workflow Manager are:

- User roles and responsibilities
- Automatic user log off
- User authorization and authentication
- Data backup and recovery
- Data encryption (at rest and in transit)