2 Setting Up Patient Information

Patient Information Overview

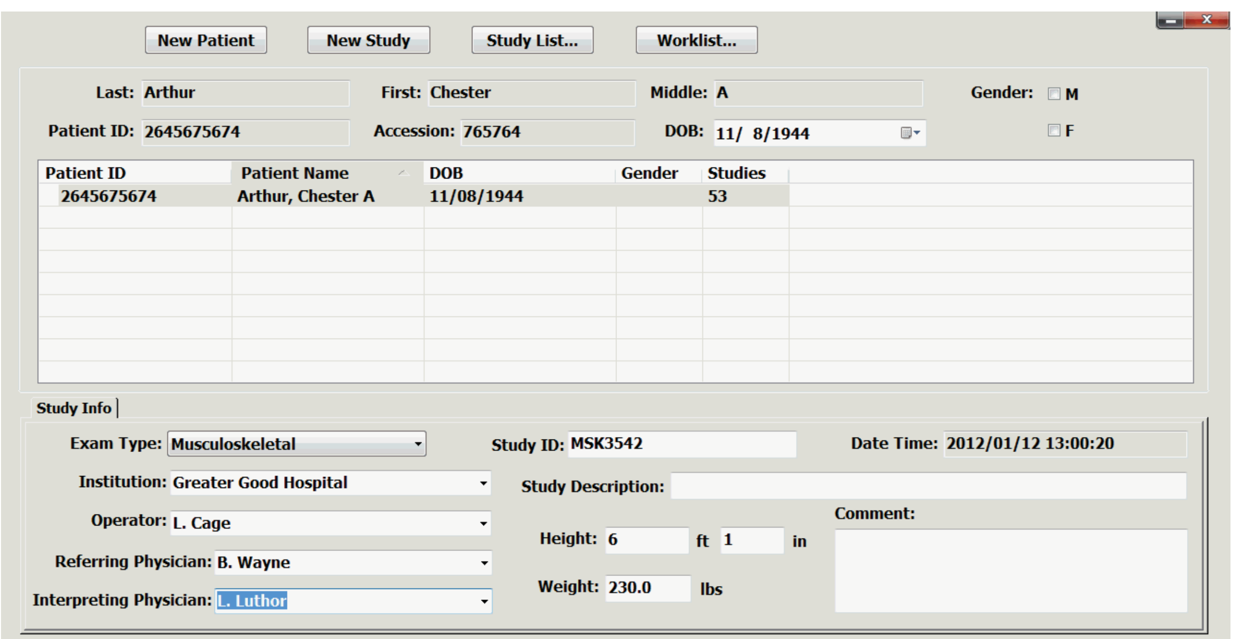
Although you can scan a patient without entering any information about that patient, you cannot save any images or loops from such an exam, so Terason recommends that you define the patient within the system. The patient data can be displayed on the scan to avoid mix-ups and is used to organize saved images.

When you save an image, the Terason software puts it in a study for the specified patient, along with a report.

To work with patient information, you should understand:

- Adding a New Patient, see page 33
- Working With Patient Information, see page 35
- Using an Existing Patient Profile, see page 37
- Updating Patient Information, see page 37
- Deleting Patient Studies, see page 37
- Configuring Reports, see page 38

To view the Patient window, press the Patient key on the console.



Patient Window

A patient profile remains loaded until one of these events occurs:

- You load a different patient’s information
- You open an image or loop in the Imaging window for a different patient
- You click the New Patient button

Adding a New Patient

If you need to start the ultrasound exam immediately, the Terason software lets you skip entering patient information. However, you normally cannot save images without a patient profile. You can enter patient information after starting such an exam (by pressing the Patient key), and images saved after that are associated with the patient info file.

When you add a new patient, the Terason software creates a profile for that patient.

Starting an exam after creating or opening a patient info file creates a new study for the date, and a report. The report file and any saved images are saved in the study.

When you enter a patient name, the total number of characters of the first, last, and middle name is limited to 62 characters. You can type up to 64 alphanumeric or special characters in any one of these fields (not all special characters are supported). However, if the total of the three fields exceeds 62 characters, the Terason software displays an error message when you try to save the patient information.

To add a new patient, complete these steps:

1. Press the **Patient key**.
2. On the Patient window, click **New Patient**.

Caution: The fields are not case-sensitive. Do not enter data that relies on case-sensitive characters.

3. Enter the last, first, and middle **names**.
4. Enter a **patient ID** (sometimes called a Medical Record Number).

   You can enter up to 64 alphanumeric or special characters. You *cannot* use any of the following characters in the Patient ID field:

   * \ |: “< > /?
5. If appropriate, enter the **accession number** from the Hospital Information System.

   You can use up to 16 alphanumeric characters. You cannot use the ‘\’ (backslash) character.
6. Enter the patient’s **date of birth**.

   a. Click the **triangle button** at the right side of the DOB display.

   A calendar showing the current month appears.

   b. Click the **month** in the DOB display, and select the **month** from the drop-down menu.

   c. Click the **year** in the DOB display, then click the up or down arrow until the correct year displays.

d. Click the correct **day** in the calendar.

The calendar disappears, and the date you selected displays in the DOB field.

7. Click in the checkbox for the patient's **gender** - M for male, or F for female.
8. Enter the patient's **height and weight**.

   To change the units of measurements used, see Patient Info Units on page 158.
9. If appropriate, enter a **study ID** number using up to 16 alphanumeric characters.
10. Enter any **comments**.

    You can type directly in the field, or click Extended Comment to type a longer comment.
11. In the **Institution:** field, enter where the exam is taking place, or select the institution name from the drop-down menu.

    You can enter as many alphanumeric characters as fit in the field.
12. In the **Operator:** field, enter the name of the clinician performing the exam, or select the name from the drop-down menu.

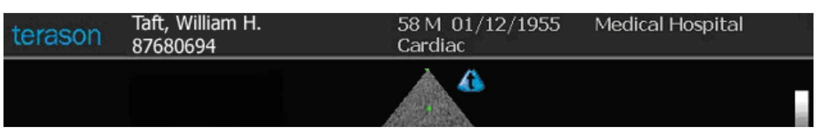
    You can enter as many alphanumeric characters as fit in the field.
13. In the **Study Description:** field, menter a description of the study.

    The description can be up to 62 characters long.
14. Press the **Accept** softkey to save the entered information and open the Imaging window.

The patient information is saved in a study associated with the patient's name. The Imaging window is ready for you to conduct the exam.

After you type in an institution name, an operator name, or a physician name, that name will appear in the associated drop-down list on the Patient window. The last-used institution name automatically fills the field on future patient windows.

The Terason software displays the patient information in the Imaging window, with the last-used scanning mode still selected. The patient information is shown across the top of the window and is saved with scanned images you create for the patient. The calculated age of the patient shows in front of the sex (M or F) indicator.



Patient Information at the Top of the Imaging Window

Working With Patient Information

You can edit and modify patient information files in several ways. See the following topics:

- Default Names in Studies and Reports on page 35
- Modifying Names in Menus on page 36
- Removing Names From Menus on page 36

Default Names in Studies and Reports

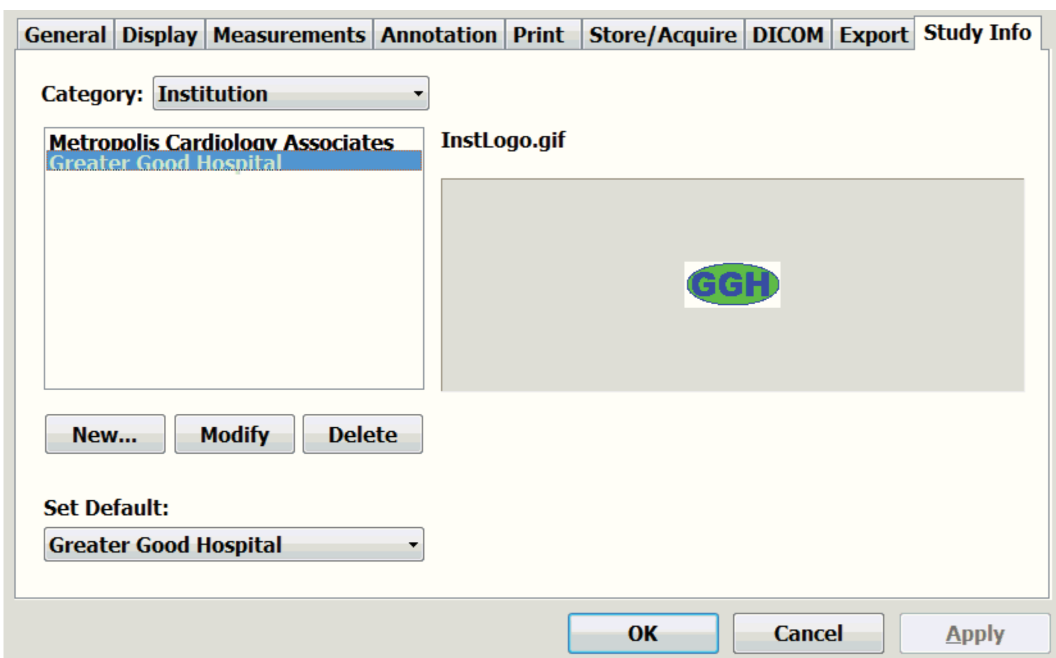
You can set defaults in the Institution, Operator, and Physician fields of Patient windows and reports. When defaults are set, those names will automatically appear in new Patient windows and reports. To change the names in the current report, choose or enter a different name in the Patient window.

Entering a name in one of the fields of the Patient window adds it to the menu of names available for that category in the Setup/Study Info window and in Patient windows.

To set a default name in Patient windows and reports:

1. Press the **Setup key**.
2. Click the **Study Info** tab.

   The Setup/Study Info window opens.

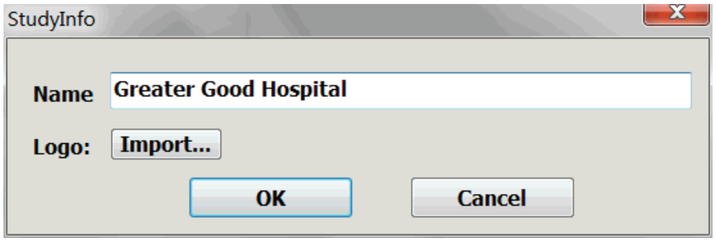


Setup/Study Info Window

3. In the **Category:** menu, select the category you want to set a default name for.
4. In the **Set Default:** menu, select the name you want to set as the default.
5. If the **desired name** is not listed in the menu, add it to the menu:

   a. Click **New...** .

The StudyInfo window opens.



StudyInfo Window

b. In the **Name:** field, enter the desired name..

c. Click **OK**.

d. In the **Set Default:** menu, select the name you want to set as the default.

6. Click **Apply**.
7. Click **OK**.

   The default name shows in green on the list of available names.

Modifying Names in Menus

You can modify an institution physician, or operator name and change the logo associated with the institution name.

To edit a name in the menus of the Patient or Setup/Study Info window:

1. Press the **Setup key**.
2. On the Setup window, click the **Study Info** tab.
3. On the Category: menu, select the **title** of the name you want to delete.
4. On the list of names for that category, select the **name** you want to delete.
5. Click the **Modify** button.

   A confirmation box opens.
6. Click in the **Name** field and .modify the name.
7. To change the institution logo, click **Import...**, and see the procedure Adding a Logo to Reports on page 38.
8. Click **OK.**
9. On the Setup/Study Info window, click **OK.**

Removing Names From Menus

You can remove institution names, physician names, and operator names from the Patient and Setup/Study Info window drop-down menus.

To remove a name from a menu:

1. Press the **Setup key**.

2. On the Setup window, click the **Study Info** tab.
3. On the Category: menu, select the **title** of the name you want to delete.
4. On the list of names for that category, select the **name** you want to delete.
5. Click the **Delete** button.

   The StudyInfo window opens.
6. Click **OK**.
7. On the Setup/Study Info window, click **OK.**

Using an Existing Patient Profile

If the patient has a profile from a previous study, you can load that profile for use with new exams.

To load a patient profile:

1. On the Patient Info window, click the **New Patient** button.
2. Double-click the relevant **patient listing**.
3. Press the **Accept** softkey.

If an exam of the patient was saved to a DICOM server that the Terason ultrasound system has access to, you can use DICOM Worklist to automatically fill in the Patient Info window fields. See Using DICOM Worklist on page 141.

Updating Patient Information

To update a patient's information, complete these steps:

1. Press the **Patient key**.
2. If the profile you want to update is not displayed, click the **New Patient** button, then click the profile to be updated..
3. Enter the **new information** in the appropriate fields.
4. Press the **Accept** softkey to save the changes.

Deleting Patient Studies

You can delete patient's studies.

Note: You cannot recover files deleted using the Terason software as you can when using Windows Explorer. Make sure you want to delete all the information in the profile, including saved scans, before you perform this procedure.

To delete a patient study:

1. Press the **Patient key** on the console.

2. On the Patient window, click the **Study List...** button.

   The Study List. window opens.

3. Click the **study** you want to delete to select it.

   To select multiple studies, hold down the Control key on the keyboard and click each of the studies you want to select.

4. When all the unwanted studies are selected, click **Delete**.

   A confirmation request appears.

5. Click **Yes** to delete the studies.

6. Press the **Close** button.

To archive the study and its associated images before you delete them, see Exporting Studies on page 115.

If you delete all the studies associated with a patient, the patient information is lost. To make a new study of that patient, you must re-enter the patient information as with a new patient.

Configuring Reports

You can set up reports to show the logo of an institution, and to automatically insert the names of an institution, an operator, an attending physician, and a referring physician.. You can also add a signature and a diagnosis to the report. See the following sections:

- Default Names in Studies and Reports on page 35
- Adding a Logo to Reports on page 38
- Adding a Signature to a Report on page 40
- Diagnoses On Reports on page 41

Adding a Logo to Reports

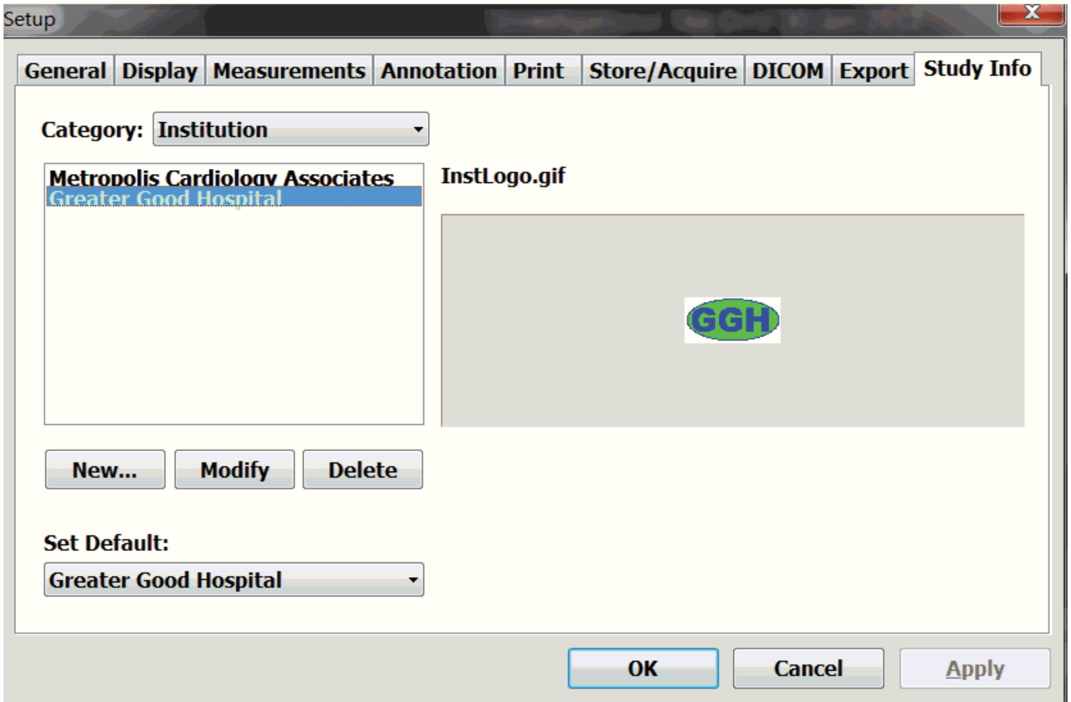
To add the institution logo:

1. Press the **Setup key**.

   The Setup window opens

2. Click the **Study Info tab**

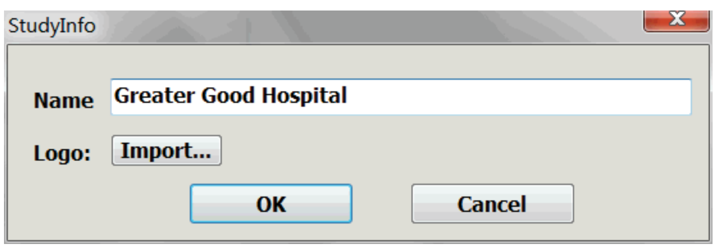
   The Setup/Study Info window opens.



Setup/Study Info Window

3. In the Category: menu, select **Institution**.
4. Click **New...**

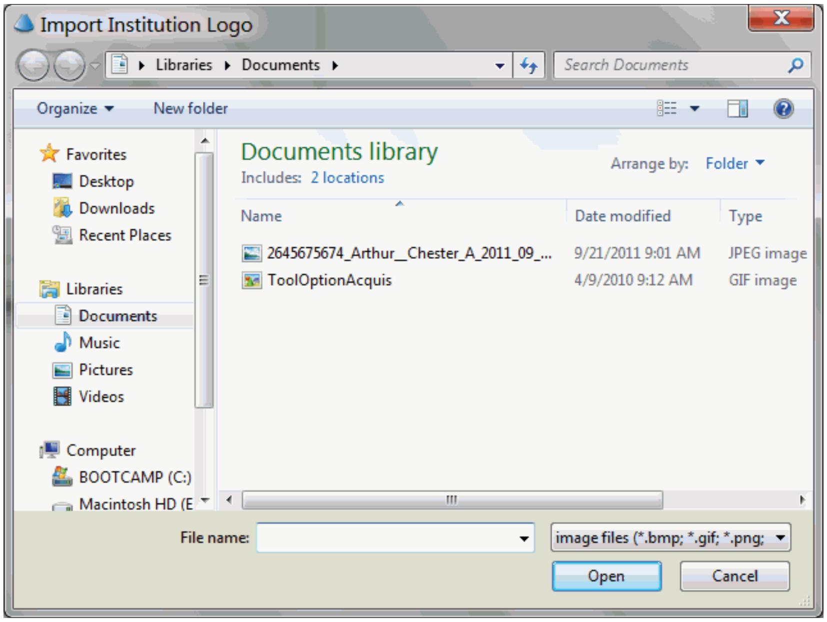
   The StudyInfo window opens.



Study Info Window

5. In the Name field, enter the **name of the institution**.
6. Click **Import...**.

   The Import Institution Logo window opens.



Import Institution Logo window

7. Navigate to the **logo image file** and select it.
8. Click **Open**.

   The software adds the logo to the report, and associates it with the institution name. The Import Institution Logo window closess.

9. In the StudyInfo window, click **Apply**.

When a study is performed and the institution name is chosen, the resulting report will include the institution logo.

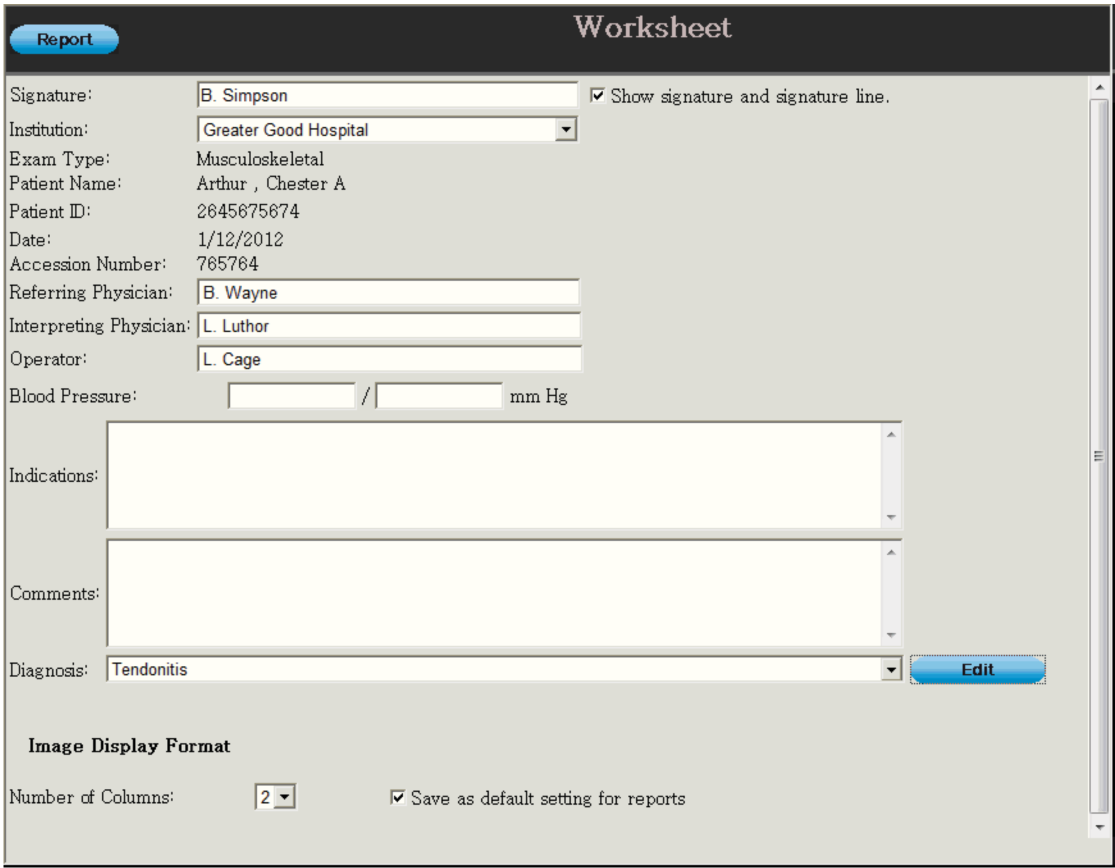
To delete a logo, remove the institution name from the drop-down menu on the Worksheet window. See.Removing Names From Menus on page 36.

Adding a Signature to a Report

To add a signature to a report:

1. On the report window, click **Worksheet**.

   The Worksheet window opens.



Worksheet Window

2. In the Signature: field, type the **signature**.
3. Click **Show signature and signature line** so the checkbox is checked.
4. To return to the report, click **Report**.

Diagnoses On Reports

A diagnosis can be added to the report using the Worksheet window, which opens when you click the Worksheet button on the Report window. The diagnoses available in the drop-down Diagnosis: menu on the Worksheet window are added by typing in the .Diagnosis:field. Diagnoses on the menu can be deleted from the drop-down menu.

Adding a Diagnosis to a Report

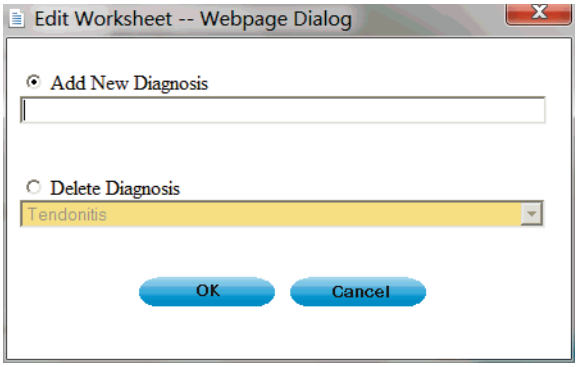
To add a diagnosis to a report:

1. On the Report window, click **Worksheet**.

   The Worksheet window opens.
2. Select the **diagnosis** from the Diagnosis: drop-down menu.
3. If the necessary diagnosis is not on the menu, add it to the list:

   a. Click the **Edit** button next to the Diagnosis: field.

The Edit Worksheet window opens.



Edit Worksheet Window

b. Make sure the **Add New Diagnosis** radio button is selected.

c. Type the **new diagnosis** into the Add New Diagnosis field.

d. Click **OK**.

The new diagnosis is added to the menu.

4. To return to the report, click **Report**.

Removing Diagnoses From the Menu

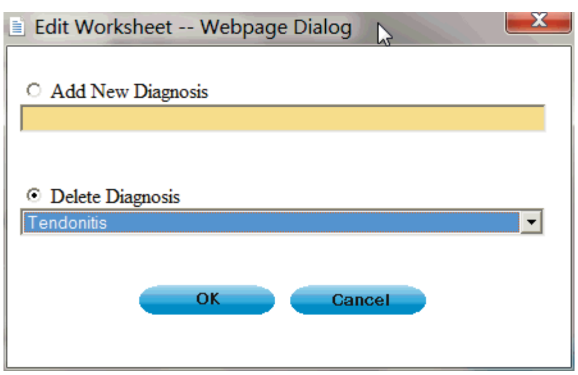
To remove a diagnosis from the drop-down Diagnosis: menu on the Worksheet window:

1. Click the **Edit** button next to the Diagnosis: field.

The Edit Worksheet window opens.

2. Click the **Delete Diagnosis** radio button so it is selected.

The drop-down menu is active.



Edit Worksheet Window with Menu Active

3. On the Delete Diagnosis menu, select the **diagnosis** you want to delete.

4. Click **OK**.

The diagnosis is deleted from the menu.