::: medidata

Mitral Review Case Creation Steps for Site User

If you experience technical difficulties, please contact Abbott or the Medidata Commercial Imaging Team at <u>commercial-imaging@mdsol.com</u>.

For Manual Upload of Images by Logging into the System

(skip to <u>page 10</u> for cases created by a Director push)

- Open *Chrome* as your browser. Should you choose NOT to use Chrome and you wish to use Internet Explorer instead, you will need to download a small piece of software called a transfer agent. The directions for how to use either Internet Explorer or Chrome are listed below (Step 9 and Step 10, respectively).
 - a. Access the platform through the following link: mitralreview.intelegridapp.com
 - b. Log in with your associated credentials



2. To create a case, select the "Cases" tab at the top left of the screen:

Dashboard Cas						Help mageneral-site@mric	tus +
Cases				All Groups	Abbott Mitral Review	• Export G Create a	a Case
Case ID ▼	Patient Initials	Case Status	Hospital Region	Site User	Assigned Sales Rep	Case Type	4
46305		Open Case		abt-projectadmin@mrict.us		Amplatzer	
46304	I.	Open Case		mageneral-site@mrict.us		Amplatzer	
46303	I.	Open Case		mageneral-site@mrict.us		Amplatzer	
46302	AC	Open Case		mageneral-site@mrict.us		Amplatzer	
46300	AC	Open Case		mageneral-site@mrict.us		MitraClip	
46299	AC	Open Case		mageneral-site@mrict.us		MitraClip	
46298	AC	Open Case		abt-projectadmin@mrict.us		Amplatzer	
46294		Open Case		mageneral-site@mrict.us		Amplatzer	
46293		Open Case		mageneral-site@mrict.us		Amplatzer	
46292		Open Case		mageneral-site@mrict.us		Amplatzer	
			 c 1 28 results) 3			

3. Click the blue "Create a Case" button on the top right. The system will confirm the project that you are creating a case for. Click anywhere within the text to create a case:

Select the type of case to create:	
Abbott Mitral Review You have been invited to participate in the Abbott Mitral Review initiative. Click here to create a case.	C Abbott
Cancel	

4. Once confirmed, a "Case Create" form will pop up:

ease provide these	patient details or click here to load from an Exam/Study
First Initial*	
Last Initial*	
MRN Number	
Hospital Name*	
	Begin typing the hospital name and select the correct name from the list.
Case Type*	 Amplatzer MitraClip
Comments	
	Please include any comments regarding the uploaded image.
Access Group	Massachusetts General Boston MA

5. Complete the required fields (with a * symbol: First Initial, Last Initial, Hospital Name, and Case Type). Put in any Initials and choose either Case Type. Choose your Hospital from the Hospital Name dropdown list. (Other hospital names may be similar to the one you are selecting, be careful to choose the correct hospital.) Additional information (Hospital City, State, ID, Rep Name and Email) will auto-fill based upon your responses:

	patient details or click here to load from an Exam/Study		
First Initial*	Т		
Last Initial*	S		
Patient Initials*	TS		
	(first name, last name)		
MRN Number	67867822		
Hospital Name*	Massachusetts General Boston MA		
	Begin typing the hospital name and select the correct name from the list.		
Hospital City	Boston		
Hospital State	MA		
Hospital Region	Southwest		
Hospital ID	999580		
Rep Name	Rep Y		
Rep Email	abbott-RepY@mrict.us		
Case Type*	 Amplatzer MitraClip 		
Comments	Test Comments		
	Please include any comments regarding the uploaded image.		
Access Group	Massachusetts General Boston MA		

6. Click the Create Case button. (The button will only be available when all required fields are complete.)

- 7. You will be taken to the new case page. The patient initials and new Case ID will appear at the top of the case. You will see basic information about the patient.
 - a. Case info: The Case Status should read "Open Case" at the top of the screen.
 - b. Forms: A form will be available on the screen for the Sales Rep (unavailable for completion by the Site User).



- c. Medical Images: When an image is uploaded, a thumbnail will appear. Site Users have the option to open images in PACS, view the DICOM headers, download the image, etc.
- d. Files: Site Users have the option to upload a file (eg, pdf) associated with the case as needed.
- e. Access List: The Site User can confirm the user groups who now have access to this particular case.

medidata Dashboard Cases Configuration		Help mageneral-site@mrict.us •
TS Case 46311		Share Close
① Case # 46311 Info		
Date of Service August 30, 20 Description Abbott Mitral Case Status Open Case Case Type Amplatzer		Abbott
E Forms		
Sales Rep: Patient/Hospital Details and Review		Open
III Medical Images		Actions -
	Upload CD Query PACS Select Study Convert Files	
占 Files		Actions -
No Files		
@ Access List		Actions -
Abbott Mitral Review Team		More -
Massachusetts General Boston	MA	More +

 You can now upload an image to the case using the zero-footprint web transfer tool. Click "Upload CD" under "Medical Images" or click "Attach an Exam/Study" in the Actions Menu. In the next step, ensure you are using the correct set of steps based on your selected browser.

III Medical Images		Actions -
	Upload CD Query PACS Select Study Convert Files	Attach an Exam/Study Create a Study from Files
🖻 Files		Actions -
No Files		
Collaboration		Actions -
	Launch Mobile Video Launch Desktop Video	

- 9. If you are using Chrome, follow steps 9a-9g and skip step 10.
 - a. The Web Transfer Tool should automatically pop up. It looks like this:

inteleGRID Account	PACS/Modality	Upload
	Click the button below to locate your images Select DICOM Folder	
		Close

b. If the Web Transfer Tool does not appear and you get the below error message, ensure that you do not have any other transfer agents installed.



c. If you do, you can uninstall the transfer agent like you would any other software. For the Advanced Transfer Agent in Chrome, you can also open it on your computer's status bar and click "Exit." Try to click "Upload CD" again.



When the Web Transfer Tool appears, proceed to the next step.

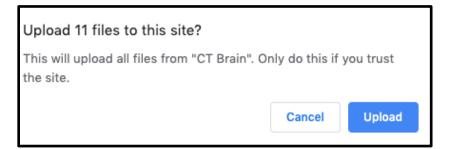
d. Click "Select DICOM Folder."



e. Select the file(s) from your network drive or the CD in the workstation that you want to upload from. Click "Upload".

Select Folder to Upload		×
← → ~ ↑ 🛄 > This PC > Desktop	マ ひ Search Desktop	م
Organize 👻 New folder		
^ Name	Date	т ^
02 Aug 2019 09 38 49STD00000	8/2/2019 9:38 AM	F
02 Aug 2019 09 38 19STD00000		F
02 Aug 2019 09 27 15STD00000	8/2/2019 9:27 AM	F
02 Aug 2019 09 20 10STD00000	8/2/2019 9:20 AM	F
02 Aug 2019 09 20 06STD00000	8/2/2019 9:20 AM	F
02 Aug 2019 09 13 51STD00000	8/2/2019 9:13 AM	F
02 Aug 2019 09 12 21STD00000	8/2/2019 9:12 AM	F
20 Jun 2019 09 57 47STD00000	6/20/2019 9:57 AM	F 🗸
v «		>
Folder: Desktop		

The system will search the selected folder for DICOM files. (The upload will not begin yet.) Since you are working in Google Chrome as a browser, a pop up will appear. Select "Upload" to proceed.



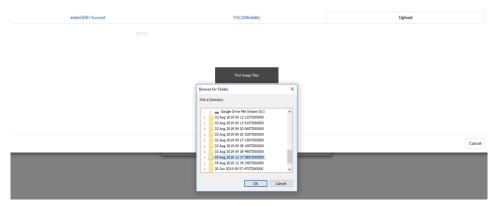
f. Upon clicking "Upload", you will see a list of files available for upload, click "Upload <#> Studies" to proceed.

	inteleGRID Account		PACS/Modality	Upload		
			Click the button below to locate your images Select DICOM Folder			
	Patient	Descriptio	n	Modality	Series	Images
\checkmark	NAME, SAMPLE		W/O CON [70450]01	СТ	1	10
Ci	NAME, SAMPLE		W/O CON [70450]01	СТ	1	10 Upload 1 Study

g. A progress bar will appear at the bottom of your screen. You can complete other tasks while the image uploads, but you must remain in the platform during the process. Click the green checkmark to close the pop-up box below. You have completed a test upload using Chrome/the Web Transfer Tool. Proceed to step 11.

Uploading			~
CT BRAIN W/O CON [70450]01	10 of 10	5.1 MB / 5.1 MB	
		(9

- 10. <u>IF YOU ARE USING INTERNET EXPLORER</u>: Check with your IT team to ensure you have correctly installed the transfer agent (ActiveX).
 - a. Once you have confirmed this, choose the "Upload" tab at the top right and select the exam to be uploaded from the correct location.

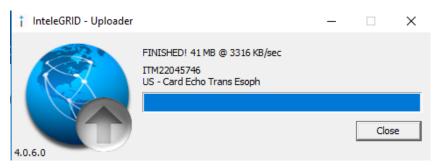


b. When the file is located, click "Submit Image Files"

Close

inteleGRID Account	PACS/N	Nodality	Upload
	Using the checkbox under 'Send', select the studies you wish to send.		
	Send Patient Name	Study Date Study Description Modal	Ser/Img
	ITM22045746	Dec 1, 2017 Card Echo Trans US	1/21

c. The image will complete the upload and a confirmation message will appear. You have now finished uploading an image in Internet Explorer using the ActiveX transfer agent.



Submit Image Files Add More Images

11. Regardless of upload method (based on your browser selection), you'll now see the same Case screen, but there will be a thumbnail of the uploaded image under "Medical Images":

TS Case 46311		Share Close
③ Case # 46311 Info		
Date of Service Description Case Status Case Type	August 30, 2019 Abbott Mitral Review Open Case Amplatzer	Abbott
E Forms		
Sales Rep: Patient/Hospital Det	sils and Review	Open
III Medical Images		Actions -
CT CTA AB Aug 11, 2014 4:2	DOMEN AND PELVIS 11.06 PM	Quick View More +
⊟ Files		Actions -
No Files		
@ Access List		Actions +
Abbott Mitral	Review Team	More -
Massachuse	tts General Boston MA	More +
Southwest R	egion	More *

If the thumbnail doesn't appear, or doesn't look right, this can indicate an issue with the upload process. In the event of an error, select "Remove Study" from the "More" menu on the right of the image:

	Actions -
Quick View	More +
P Open in PACS	;
Send Study to	PACS
Download	
O Burn CD-ROM	1
View DICOM I	Headers
× Manage Serie	s
♥ Upload & Convert File	
Remove Study	

The case should be listed with a case status of "Open Case".

① Case # 46311 Info		
Date of Service Description Case Status Case Type	August 30, 2019 Abbott Mitral Review Open Case Amplatzer	Abbott

This case has been automatically shared with the Sales Rep.

12. The Sales Rep will complete their review and form. If they choose to reject the image, the site user who created the case will receive a notification at the login email address. They should log in and remove the existing uploaded image:

III Medical Images	Actions +
Image: CTA_ABDCOMENTAND_FBLV8 Apt 11: STA 42130 FM Apt 12: STA 42130 FM Andoret in magnetic indication and apt 12: STA 484 Andoret in magnetic indication and apt 12: STA 484 Andoret in magnetic indication and apt 12: STA 484 Andoret indication and apt 12: STA 484	Quick View More +
Annue on bed 31 2019	다 Copen PACS
Lo Pies	Bam CD-ROM Beam CD-ROM Wew CDCMM Headers X Manage Series
© Access List	♥ Uplace & Convert File ■ Remove Study
Abbott Mitral Review Team	More +

A new image can be uploaded using the same process as above. The Case Create form does not need to be completed again unless any of those details have been changed. The Case Status will be updated to "Open Case" again. The Sales Rep will receive a notification that the case is ready for review again, and they can log in and complete their form.

If Images are pushed automatically from your PACS with a Director

- 13. Open your browser. Access the platform through the following link: <u>mitralreview.intelegridapp.com</u>
 - a. Log in with your associated credentials



14. The Director service will have pushed an image automatically from your PACS. The system will associate that image to a new case. To locate the new case, select the "Cases" tab at the top left of the screen. The newest case will appear at the top of the list.

Emedida						Help mageneral-site@mrict.u:	is +
Cases				All Groups	Abbott Mitral Review	▼ ● Export	ase
Case ID ▼	Patient Initials	Case Status	Hospital Region	Site User	Assigned Sales Rep	Case Type	<u>ب</u> ٩
46305		Open Case		abt-projectadmin@mrict.u	ıs	Amplatzer	
46304	1	Open Case		mageneral-site@mrict.us		Amplatzer	
46303	1	Open Case		mageneral-site@mrict.us		Amplatzer	
46302	AC	Open Case		mageneral-site@mrict.us		Amplatzer	
46300	AC	Open Case		mageneral-site@mrict.us		MitraClip	
46299	AC	Open Case		mageneral-site@mrict.us		MitraClip	
46298	AC	Open Case		abt-projectadmin@mrict.u	s	Amplatzer	
46294		Open Case		mageneral-site@mrict.us		Amplatzer	
46293		Open Case		mageneral-site@mrict.us		Amplatzer	
46292		Open Case		mageneral-site@mrict.us		Amplatzer	
			 < 1 2 3 26 results) 3			

15. Use the information in the cases list (eg, Patient Initials, Case ID if you know it) to locate the case you want to update. Click on the case and you will be taken to the new case page.

- 16. The patient initials and new Case ID will appear at the top of the case. You will see basic information about the patient.
 - a. Case info: The Case Status should read "Open Case" at the top of the screen.
 - b. Forms: A form will be available on the screen for the Sales Rep (unavailable for completion by the Site User).



- c. Medical Images: A thumbnail of the image that has been pushed by the Director will appear. Site Users have the option to open images in PACS, view the DICOM headers, download the image, etc.
- d. Files: Site Users have the option to upload a file (eg, pdf) associated with the case as needed.
- e. Access List: The Site User can confirm the user groups who now have access to this particular case.

Case # 46311 Info		
ate of Service lescription ase Status ase Type	August 30, 2019 Abbott Mitral Review Open Case Amplatzer	Abbott
Forms		
ales Rep: Patient/Hospital D	etails and Review	Open
Medical Images		Actions -
CT CTA A Aug 11, 2014	BDOMEN AND PELVIS 12108 PM	Quick View More
∃ Files o Files		Actions -
Access List		Actions -
Abbott Mitr	al Review Team	More
Massachus	etts General Boston MA	More
55		

17. At the upper left of the Case screen, hover over the Case ID. A pencil icon will appear:

∷tmed				
Dashboard	Cases	Image Library	Configuration	
TS Ca	se 463	1		
 Case # 4 	6311 Info			
Date of Servic	e			August 30, 2019
Description				Abbott Mitral Review
Case Status				Reviewed
Case Type				Amplatzer
Forms				
Sales Rep: Pa	atient/Hospit	al Details and Rev	iew	

Click on the pencil icon to edit the "Create a Case" form to provide additional patient details.

Create a Case			
Please provide these	patient details or click here to load from an Exam/Study		
First Initial*			
Last Initial*			
MRN Number			
Hospital Name*			
	Begin typing the hospital name and select the correct name from the list.		
Case Type*	 Amplatzer MitraClip 		
Comments			
	Please include any comments regarding the uploaded image.		
Access Group	Massachusetts General Boston MA		
Cancel	Previous Create Case		

18. Complete the required fields (with a * symbol: First Initial, Last Initial, Hospital Name, and Case Type). Enter Initials and choose either Case Type. Select Hospital from the Hospital Name dropdown list. (Other hospital names may be similar to the one you are selecting, be careful to choose the correct hospital.) Additional information (City, State, ID, Rep Name and Email) will auto-fill based on your responses:

ease provide these	patient details or click here to load from an Exam/Study
First Initial*	Т
Last Initial*	S
Patient Initials*	TS
	(first name, last name)
MRN Number	67867822
Hospital Name*	Massachusetts General Boston MA
	Begin typing the hospital name and select the correct name from the list.
Hospital City	Boston
Hospital State	MA
Hospital Region	Southwest
Hospital ID	999580
Rep Name	Rep Y
Rep Email	abbott-RepY@mrict.us
Case Type*	 Amplatzer MitraClip
Comments	Test Comments
	Please include any comments regarding the uploaded image.
Access Group	Massachusetts General Boston MA

19. Click the Create Case button. (The button will only be available when all required fields are complete.) You'll return to the same Case screen with a thumbnail of the image that was

pushed by the Director under "Medical Images". The case should be listed with a case status of "Open Case".

① Case # 46311 Info		
Date of Service Description Case Status Case Type	August 30, 2019 Abbott Mitral Review Open Case Amplatzer	Abbott

This case has been automatically shared with the Sales Rep.

20. The Sales Rep will complete their review and form. If they choose to reject the image that was pushed from your PACS, the site user who updated the Case Create form will receive a notification at the login email address. They should log in and remove the existing uploaded image:

III Medical Images	Actions -
CTA ABDOMEN AND PELVIS AU ADDAMEN AND PELVIS ADDAMEN AND PELVIS ADDAMEN AND ADDAMEN ADDAMEN AND ADDAMEN ADDAMEN ADDAMEN AND ADDAMEN ADDAM	Guidt View More *
Andhive on Sep 29, 2019	
⊡ Files	Convioad Generation Generation Generation View DICOM Headers
No Files	♥ vmv unuum readens >>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>
© Access List	♥ upoae s. content rue ■ Remore Study
Abbott Mitral Review Team	More *

A new image can be uploaded using the same process as above. The Case Create form does not need to be completed again unless any of those details have been changed. The Case Status will be updated to "Open Case" again. The Sales Rep will receive a notification that the case is ready for review again, and they can log in and complete their form.