medidata

Mitral Review Case Creation Steps for Site User

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

For Manual Upload of Images by Logging into the System
(skip to page 10 for cases created by a Director push)

1. 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:

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.

Abbott

Cancel

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

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

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:

Create a Case

Please provide these patient details or click here to load from an Exam/Study

Field	Value
First Initial*	T
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 ▼

Cancel   Previous   Create Case

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

Mitral Review Site User Steps

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.
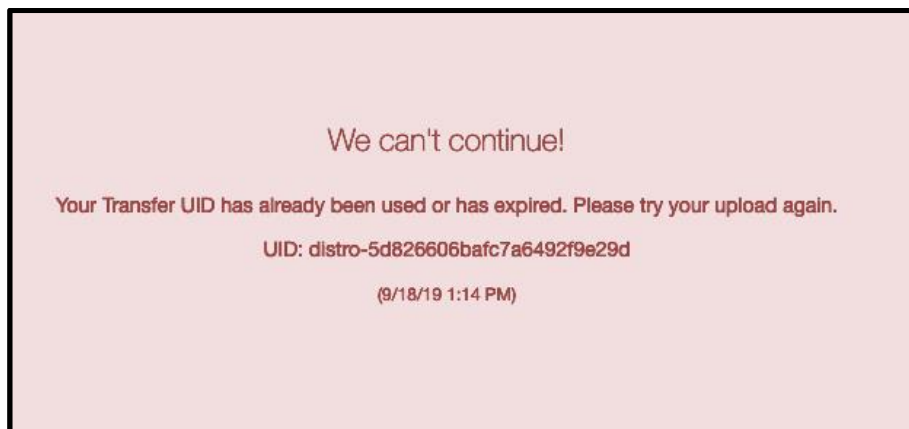
Mitral Review Site User Steps

8. 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.
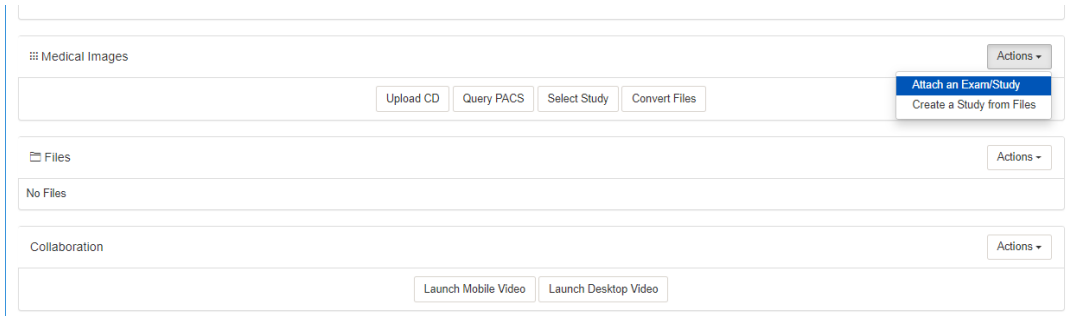
9. If you are using Chrome, follow steps 9a-9g and skip step 10.
    a. The Web Transfer Tool should automatically pop up. It looks like this:
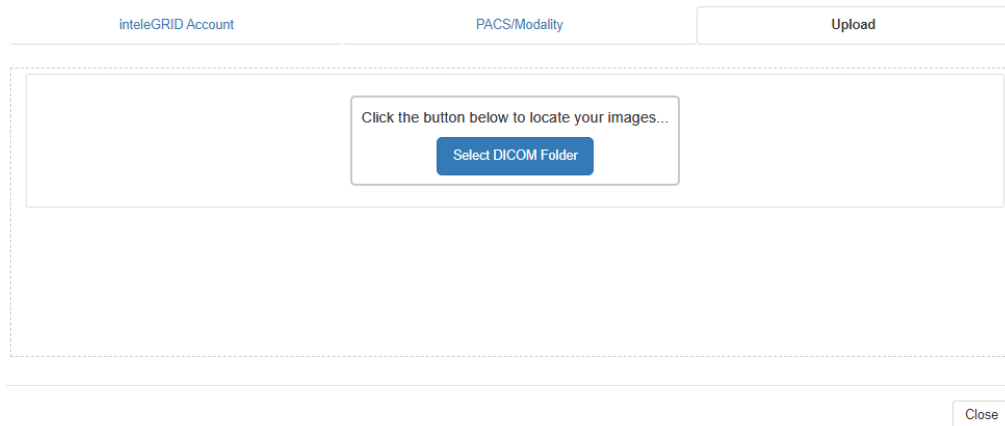
    b. If the Web Transfer Tool does not appear and you get the below error message, ensure that you do not have any other transfer agents installed.

We can't continue!

Your Transfer UID has already been used or has expired. Please try your upload again.

UID: distro-5d826606bafc7a6492f9e29d

(9/18/19 1:14 PM)

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.
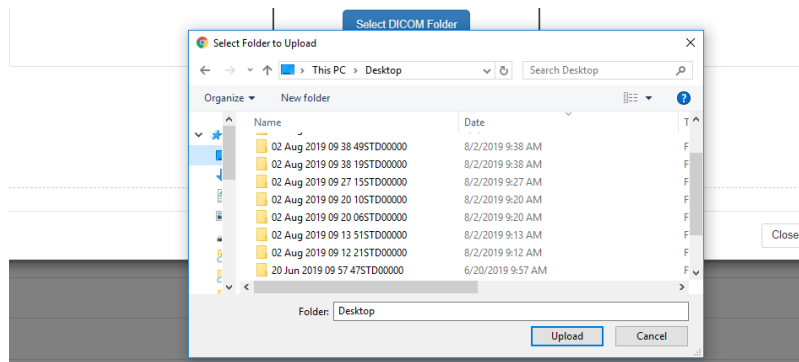

When the Web Transfer Tool appears, proceed to the next step.

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".


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.
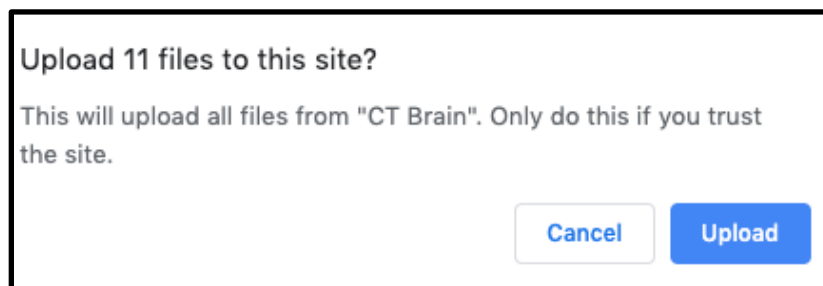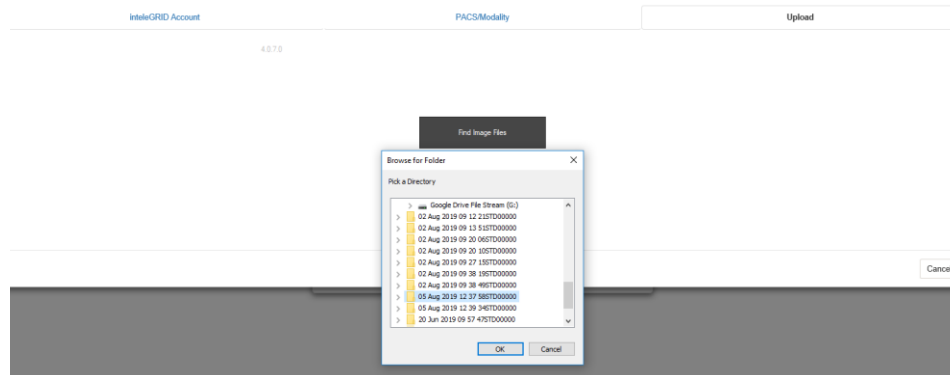

f. Upon clicking "Upload", you will see a list of files available for upload, click "Upload <#> Studies" to proceed.
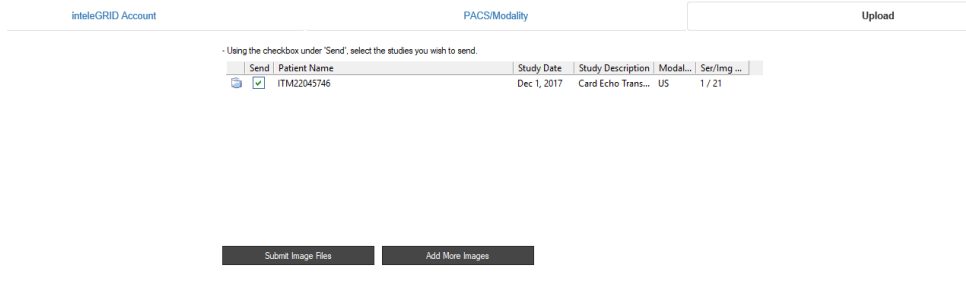
6
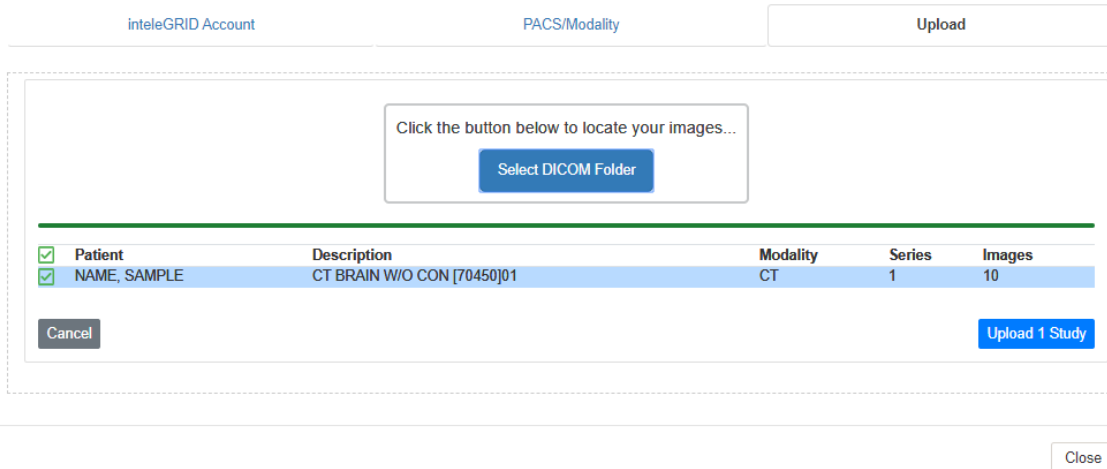
g. A progress bar will appear at the bottom of your screen. You can complete other tasks while the image uploads, but you must remain in the platform during the process. Click the green checkmark to close the pop-up box below. You have completed a test upload using Chrome/the Web Transfer Tool. Proceed to step 11.
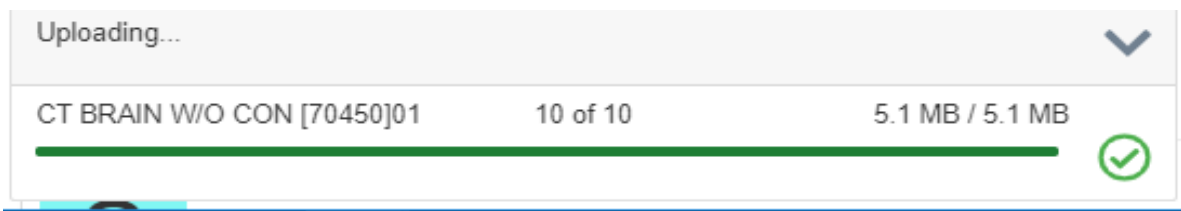

10. IF YOU ARE USING INTERNET EXPLORER: Check with your IT team to ensure you have correctly installed the transfer agent (ActiveX).
    a. Once you have confirmed this, choose the "Upload" tab at the top right and select the exam to be uploaded from the correct location.


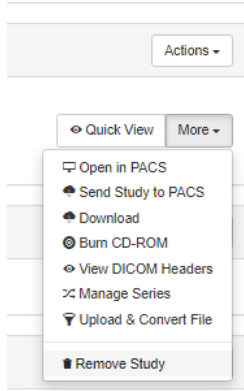   b. When the file is located, click "Submit Image Files"

Mitral Review Site User Steps

inteleGRID Account	PACS/Modality	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

Submit Image Files   Add More Images

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.
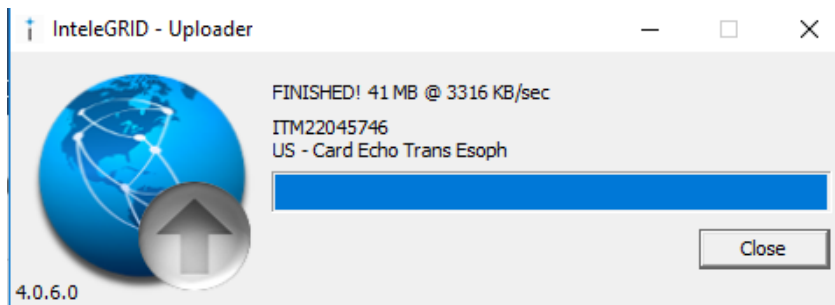
11. Regardless of upload method (based on your browser selection), you'll now see the same Case screen, but there will be a thumbnail of the uploaded image under "Medical Images":
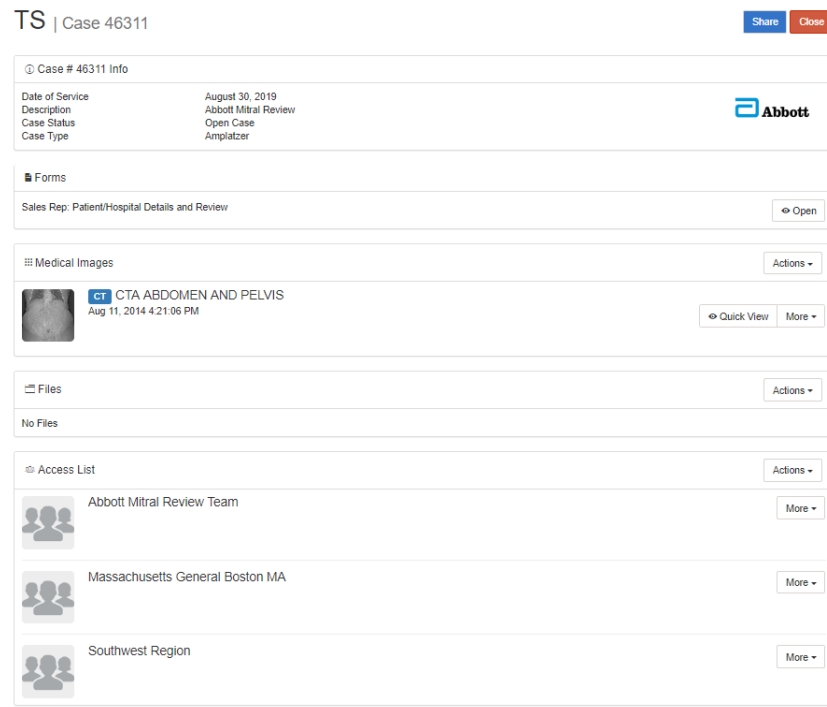
If the thumbnail doesn't appear, or doesn't look right, this can indicate an issue with the upload process. In the event of an error, select "Remove Study" from the "More" menu on the right of the image:

Mitral Review Site User Steps

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

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:
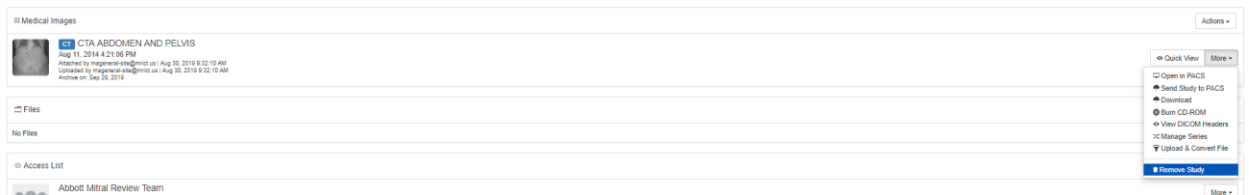
A new image can be uploaded using the same process as above. The Case Create form does not need to be completed again unless any of those details have been changed. The Case Status will be updated to "Open Case" again. The Sales Rep will receive a notification that the case is ready for review again, 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:
    mitralreview.intelegridapp.com
    a. Log in with your associated credentials
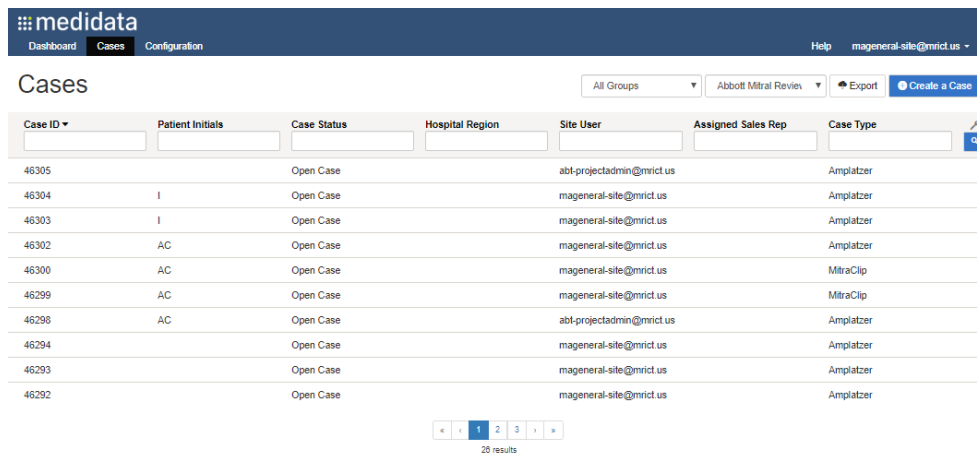
14. The Director service will have pushed an image automatically from your PACS. The system will associate that image to a new case. To locate the new case, select the "Cases" tab at the top left of the screen. The newest case will appear at the top of the list.
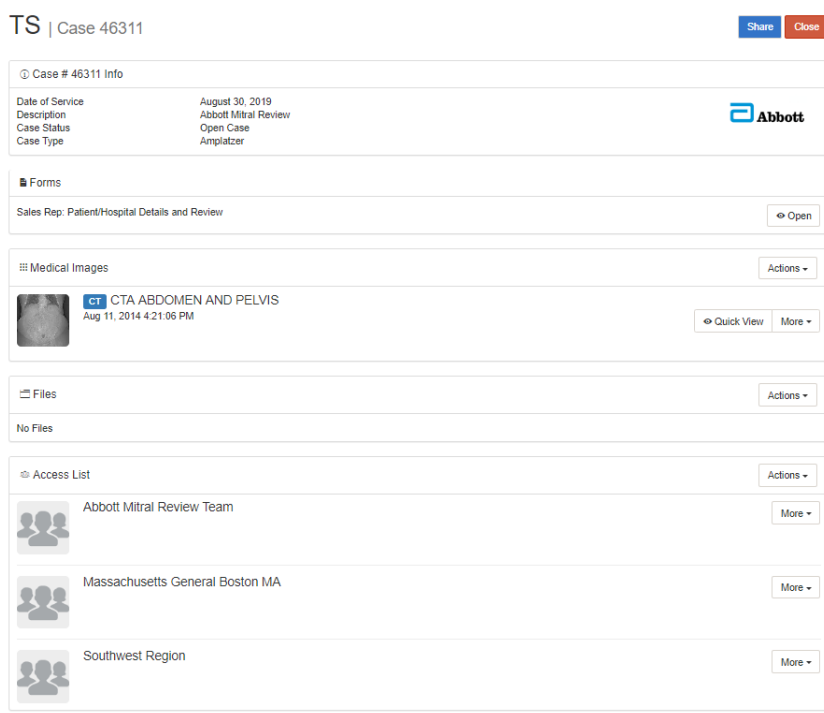

15. Use the information in the cases list (eg, Patient Initials, Case ID if you know it) to locate the case you want to update. Click on the case and you will be taken to the new case page.

Mitral Review Site User Steps

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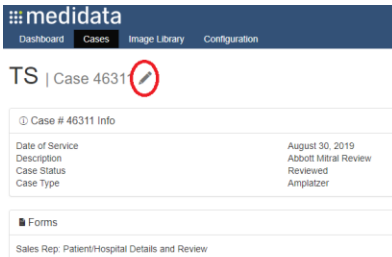   a. Case info: The Case Status should read "Open Case" at the top of the screen.
    b. Forms: A form will be available on the screen for the Sales Rep (unavailable for completion by the Site User).

    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.

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

Mitral Review Site User Steps

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

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:

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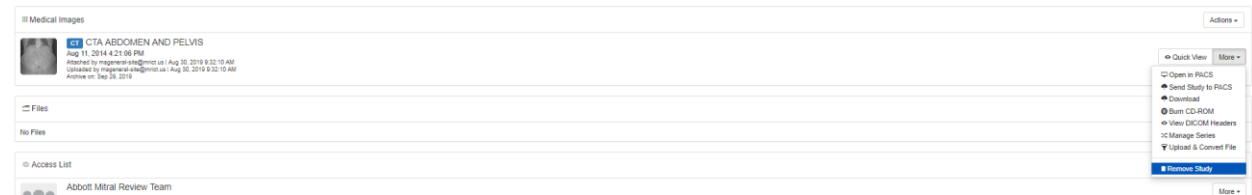
pushed by the Director under "Medical Images". The case should be listed with a case status of "Open Case".

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:

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.

Mitral Review Site User Steps