

# Patient Search in eRAD - Best Practices Job Aid

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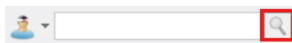


## Patient Search in eRAD - Best Practices Job Aid

When scheduling a patient, it's best practice to search for them first—by name and date of birth (DOB)—to determine if they already have a profile in the system. This helps avoid duplicate records and ensures access to their history.

### Start Your Search Here

- Use the search bar in the top-right corner of the screen.



NOTE: By clicking the magnifying glass, you can open the Patient Search Tab, where search criteria can be placed in specific queries

### DOB Format Options Accepted in eRAD

- You can enter dates in any of these formats:

- MMDDYY → 070860
- MM/DD/YY → 07/08/60
- MM-DD-YY → 07-08-60
- MMDDYYYY → 07081960
- MM/DD/YYYY → 07/08/1960
- MM-DD-YYYY → 07-08-1960

### Name Search Formats

- eRAD supports a variety of name entry formats:

- DOE, JANE (Last, First)
- JANE DOE (First Last)
- D, J (Initials)
- DO, JA (Partial Name Search)

## Phone Number Search Options

- These formats are accepted:
  - 1234567890 (No separators)
  - 123-456-7890
  - 123/456/7890
  - (123) 456-7890

## Viewing the Patient Folder

- Once your search results display:

The screenshot shows the 'Patient Search' window. The search criteria are: First Name: RHONDA, Last Name: ZTEST, Birth Date: MM-dd-yyyy, Phone #: , Zip Code: , MRN: . There are 'Search' and 'Reset' buttons, and a dropdown for 'New Patient / New Appointment'. Below the search criteria is a table of results:

First Name	Last Name	Middle Name	Birth Date	MRN	Issuer	Gender	Address	City	State	Zip Code	Matching Alternate MRN	Matching Alternate
RHONDA	ZTEST		12-07-1953	863390	system	F	1234 zee lane	aty	TX	76067		
RHONDA	ZTEST		02-14-1985	3250336	system	F						
Rhonda	Ztest		02-14-1978	6696885	system	F				77535		
RHONDABURLESON	ZTEST		02-14-1976	3049169	system	F	1234 NOT A REAL ADDRESS	Mont Belvieu	TX	77523		
RhondaRose	ztest		11-11-1980	3242005	system	F						

- Double-click the patient's name to open their **Patient Folder**.
- To better understand the **Patient Folder**, review the [Understanding the Patient Folder in eRAD](#) job aid.

## Can't Find the Patient

- After trying all options:
  - Results section will display "No patient found matching your search"

The screenshot shows the 'Patient Search' window with search criteria: First Name: MISTY, Last Name: ZTEST, Birth Date: 08-29-1985, Phone #: , Zip Code: , MRN: . There are 'Search' and 'Reset' buttons, and a dropdown for 'New Patient / New Appointment'. Below the search criteria is a table with the following message: 'No patient found matching your search'.

First Name	Last Name	Middle Name	Birth Date	MRN	Issuer	Gender	Address	City	State	Zip Code	Matching Alternate MRN	Matching Alternate MRN Issuer	Matching Alternate First Name	Matching Alternate Last Name	Phone Numbers	Email Addresses
No patient found matching your search																

- Click [New Patient/New Appointment]
- Follow the steps in the [Creating & Scheduling a New Patient in eRAD](#) job aid

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## Tips to Improve Your Search

- Confirm spelling (watch for hyphens, apostrophes, etc.)
- Ask for **previous names** (maiden, married, nicknames)
- Use **partial searches** (first few letter of first or last name)
- Try **first name only** or **last name only** + DOB
- Avoid over-filtering, too many filters can prevent existing profiles from appearing. Keep it simple when in doubt.

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