Scheduling Existing Patient - New Exam - Multiple Exams

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Contact Center Scheduling in eRAD RIS Exisiting Patinet - Multiple Exams

When scheduling a patient, it is always best practice to search for the patient in the system first. This will help to identify whether the patient is existing or new and can provide the details of the patient's history.

1. Search for the patient using the search bar in the top right corner

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	- 53

- 1. Search by Date of Birth
 - 1. 2 digit month/2 digit day/four digit year
 - 2. Ex: 07/08/1960 or 07-08-1960
- 2. Results for search will display

Patient Search	ж										3 0 0
earch Criteria											
Eirst Name:	HOLLY		2	Birth Date:	MM-dd	-уууу					
Last Name:	TEST			Phone #:							
	Search (other Variations	6	Zip Code:							
MRN:					Sea	arch	Reset	New Patient	t / New	Appointmen	t 🔻
First Name	Last Name	Middle Name	Birth Date	MRN	la cuer	Gender	Address	(7).	Challe	Zip Code	Matching Alter
		Middle Name			Issuer			City	State		MRN
HOLLY	TEST		04-29-1960	T3000057	system	F	15601 DALLAS PARKWAY	Addison	TX	75001	

3. Double Click on correct matching patient

earch Criteria											
Eirst Name:	HOLLY		æ	Birth Date: MM-dd-yyyy							
Last Name:	TEST			Phone #:							
	Search (Other Variations		Zip Code:							
MRN:					Sea	arch	Reset	New Patien	t/New	Appointmen	t 🔻
First Name	Last Name	Middle Name	Birth Date	MRN	Issuer	Gender	Address	City	State	Zip Code	Matching Alter
						F	15601 DALLAS PARKWAY	Addison		75001	

4. The patient's exam history will display

Patien	t Sei	arch Patier	nt: TEST, HOLI	Y #T3000067 (2) ×			0008
U	3		2 🦾	Tx 🗊 Contact Center			
Flags	1	Nuggets	Status	Procedures	Urgency Level	Scheduled Date	Referring
	∇	2	7 7	7	Y	Ŷ	
\$ @D		1000	Scheduled	Mammogram Screening Digital W/ CAD [45] - 76	Screening M	03-23-2018 3:30 PM	SMITH, A
\$ @		20/00	Scheduled	Bone Density [49]	Need Order	03-23-2018 3:00 PM	SMITH, A

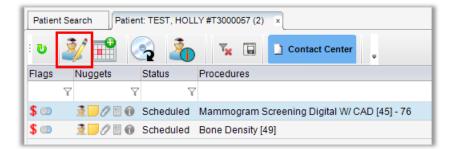
5. To review demographics, click on the "Summary Nugget" (person)



6. Patient's demographic summary will display

X 📙 🖉 🖺 🗊	Scheduled Mammogram Scre	ening Digital W/ CAD [45] - 76 Screening
Summary Info	ormation	Σ
HOLLY TEST 57	7y 10m (F)	CURRENT 😈
Birth Date: Phone #: Mobile #: Work #: Email:	04-29-1960 (57y 10m) (469) 678-1837 (469) 678-1837	Previous MRN Issuer Active
Address:	15601 DALLAS PARKWAY Addison, TX 75001 (US)	Referring: <u>SMITH, ADAM B, DO (817) 850</u>
		Mammogram Screening Digital W/ CAD [45] - 76

7. If needing to edit existing demographics, click on the "Edit Patient" icon (person with pencil)



- 8. The "Edit Patient Tab" will open to allow updates and "Save"
- 9. Review the patient history before scheduling exam
- 10. To schedule, click on the calendar icon

Patien	t Search	atient: TEST, HC	DLLY #T3000057 (2) ×
5	ž /	l 🔄 🤰	〕 🍹 🗐 🗋 Contact Center 💂
Flags	Nuggets	Status	Procedures
	∇	Y	\forall
\$ 💿	1. O 🗉	Schedule	d Mammogram Screening Digital W/ CAD [45] - 76
\$ 🗊	2 . 0	Schedule	d Bone Density [49]

11. The "Schedule Order Tab" will open

CeRAD RIS (as Holly Shirley[Hshirley	geRAD RIS (as Holly Shirley[Hshirley])											
File Administration Scheduling Front Desk Help												
Attach Inbound Documents P	Patient Search Schedule	Order: TEST, SARAH	1#T3000295 * ×									
Patient Patient Notes Contac	cts / Demographics Order	Image Request (0)	Billing Codes	Review	Contact Log							

12. On the Scheduling Tab,

- 1. Search for the exam you are needing to schedule by typing the exam into the Studies box.
- 2. The search tool will begin to narrow down the list of exams.
- 3. Click on the appropriate exam type (with mouse click or by hitting enter)

Schedule Order: TEST, Ariel #T3000012 * •	
Patient Patient Notes Contacts / Demographics Order Clinical Schedule Image Request (0) Billing Codes Review Contact Log	
Studies	Duration
Sof	0 0
3D Mammogram Screening Digital WICAD (116)	er study
Mammogram Screening Digital \// CAD (45)	an soudy

13. When Exam Type requires Laterality, IMMEDIATELY select from the drop-down list (middle of page)

Laterality	Ŧ

14. To add another exam, select "Click here to add another study"

Patient Patient	Notes Contacts / Demographics	Order (Clinical	Schedule	Image Request (0)	Billing Codes	Review	Contact Log		
	Studies	1000			Duration		Room	1	Scheduled Date	
Mammogram Scr	eening Digital W/ CAD x			15 🗘				💌 MM-dd-yyyy h.mm a 📰 🗁 🖉 🧟	K	
				- [Click hereto add	another study				

15. Search for the additional exam(s)

Patient	Patient Notes	Contacts / Demo	graphics	Order	Clinical	Schedule	Image	Request	(0)	Billing C	odes F	Review	Contact L	og					
Order	er Studies					Duration					Room			Scheduled Date					
A	Mammogram Screening Digital W/ CAD x							15			-	MM-dd-yyyy h.mm	a 18	0	8	×			
A .	bone							þ	4	:				*	MM-dd-yyyy h:mm	a	0	8	×
		Bone Density (49) Bone Density Pediatric (144)							re to add another study										
		Bone Density w/ IVA (142)																	
	Legacy Bone	Density (88)																	

- 16. Note: The order in which you select the exam MATTERS. Be sure to put them in the order that they should be scheduled according to the scheduling rules. Ex: Diagnostic Mammograms are ALWAYS followed by a Breast Ultrasound
 - 1. Top exam: Will be first appointment
 - 2. Additional exams: Will follow in order listed
 - 3. To change order of exams, delete and search again

Patient	Patient Notes	Contacts / Demographics	Order	Clinical	dule Image I	Request (0)) B
Order		Stud	ies			Dura	tion
A	Mammogram S	Creening Digital W/ CAD x	1			15	÷
A	Bone Density	x				30	÷

Patient	Patient Notes	Contacts / Demographics	Order	Clinical	Schedule	Image R	Request (0) B
Order		Stud	lies				Durat	tion
A 🔻	Bone Density	x					30	÷
A 🔻	Mammoqram S	Creening Digital W/ CAD x]				15	ŧ

- 17. Use the Search Options to select Location, Date, and Time of exam:
 - 1. Select a Region (Solis Mammography or Washington Radiology)
 - 2. Select a Practice (Region)
 - 3. Select a Site (Center)
 - 4. Select the day and time options according to patient preferences. (Not required to use all search options)
 - Check or uncheck days of the week
 - Enter Earliest and Latest time range
 - Enter date range to search
 - 5. Choose the Search Range according to the patient's preferences
 - 6. Click "Search"
- 18. Two Search Functions are available:
 - 1. Summary Tab Shows the earliest available search match in the

morning, mid-morning, afternoon, and mid-afternoon

1. Note: Hover over the time to see a break out of the exams and order

30min on Friday, March 23, 2018 2:30 PM on DFW-Southlake BD(192) 15min on Friday, March 23, 2018 3:00 PM on DFW-Southlake MG 1(190)

2. Details Tab - Shows every search match available

NOTE: Match times are for ALL exams selected and in the order requested!

DO NOT SCHEDULE IN YELLOW SLOTS! THESE ARE BLOCKED AND NOT TO BE USED!

earch Options						
Region						
Solis Mammog	raphy	-				
Practice	C) Site group				
Solis Mammog	raphy					
Site						
Solis Mammog	raphy	Southlake 🔻				
Minutes betw	een sti	udies				
Min 0	‡ N	lax 0 🚖				
Day and time	optior	ıs				
Monday		Monday				
Vednesd	lav	Earliest				
Thursday	-	10:00 AM				
Friday Saturday		Latest				
Sunday		4:00 PM				
Search Range						
Start Date	03-23	3-2018 🔻				
End Date	03-2	7-2018 🔻				
	Searc	sh 🔶				

Ved, 03-21-201	8	105	
Mid Morning	12:05 PM	Fri. 03-23-2018	
Afternoon	1:45 PM	11,00-20-2010	
Mid Afternoon	3:30 PM	2:30 PM Bone Density	19
		3:00 PM Mammogram Screening Digit	19
		3:00 PM Bone Density	19
T	nu, 03-22-2018	3:30 PM Mammogram Screening Digit	19
Morning	7:30 AM		_
Mid Morning	10:30 AM	Mon, 03-26-20	18
Afternoon	1:00 PM	1:30 PM Bone Density	19
Mid Afternoon	3:30 PM	2:00 PM Mammogram Screening Digit	19
		2:00 PM Bone Density	19
F	Fri, 03-23-2018	2:30 PM Mammogram Screening Digit	19
Morning	7:45 AM	2:30 PM Bone Density	19
Mid Morning	10:45 AM	3:00 PM Mammogram Screening Digit	19
Afternoon	1:00 PM	3:00 PM Bone Density	19
Mid Afternoon	3:30 PM	3:30 PM Mammogram Screening Digit	19

hu, 04-05-201	EL 🕊		FH -		LU Thu, 04-05-20	12 ±	
Morning	11:25 AM	Morning	11:25 AM	Morning	11:25 AM	Tâ.	First day in range
Afternoon	1:00 PM	Afternoon	1:00 PM	Afternoon	1:00 PM	_	
					E-1 04 00 2012	-	
Fri, 04-06-2012	2				Fri, 04-06-2012		Second day in range
Fri, 04-06-201; Morning	2 7:45 AM	Morning	7:45 AM	Morning	Fri, 04-06-2012 7:45 AM		Second day in range

- 19. To select a time slot, click on the time ONCE
 - 1. The scheduled date will display the exam date and time in the top pane
 - 2. If the box around time is red, click time slot requested again (once)



20. To delete an appointment, select the red X



21. Click on the "Order Tab"

e Administration Scheduling Front C	lesk Help										
dach Inbound Documents Patient S	earch Schedu	ale Order: 1	TEST, SARAH	T3000295 · ·							
Patient Patient Notes Contacts / Den	nographics Orde	r Clinica	N Schedule	Image Request	(0) Billing Codes	Review	Contact Lo	2			
Reason for exam	Referrence					CC Physic	cians				
03-21-18 hshirley -	Referring *			-2						1	1
	Visited at *				*	Visit loc	ation for CC				
	img notes				~	1					
					~	Copy	to patient				
	Ref. date	MM-05-7	yyy 📰								
Preferred Location	Flags										
Practice * Solis Mammography *		erral [Transportatio	n required				Class	*Outpatient	Ψ.	
Site +			pecial accomm				-	Sedation		+	
	STAT rea	d						Transi	tion of care		
	STAT Pre	Cert			Urgency Level			Provid	ed Educational	Resou	rce
nsurance Policies							Billin	Method			
Note Carrier Code Carrier Name	Policy # Group No	imber Gro	oup Name Pho	one Pridity Elig	ibility						_
								03-21-18	hshirley -		
							•				
Manage Policies IVT Notes							Amos	int to colle	d.		18
Order Notes				Schedulin	no Notes						
03-21-18 hshirley -					8 hshirley -						

- 22. On the "Order Tab", add the detailed order information
 - 1. Reason for Order If already listed, DO NOT UPDATED! If this field is blank, select from the Auto-text options listed. Then copy and paste into Order Notes.
 - Referring Physician Details Search for the referring physician by name [last name, first name] and click the magnifying glass. Confirm the appropriate physician by stating the address in the Primary Office field. CC Physician- If requesting to add additional physicians, add into this section.
 - 3. Class This is for the Contact Center to update if prior films are required or not.
 - 4. Urgency Level This represents the call and/or order status for the exam (Priority Status)
 - 5. Manage Policies This is where patient insurance information (Carrier and Policy #) will be captured
 - 6. Order Notes This is for the Contact Center only! Add any notes that were collected on the call from the patient at the time of scheduling

Schedule Order * ×	
Patient Patient Notes Contacts / Der	nographics Order Clinical Schedule Image Request (0) Billing Codes Review Contact Log
Reason for order 04-01-2021 Stephanie.Williams - 🕎	Referring Details CC Physicians Referring 1 Visited at * Visited at * Visit location for CC * Img notes Copy to patient
Preferred Location Practice* Mammography-Eastern ▼ Site ▼	Flags Direct referral Transportation required STAT exam Special accommodations STAT read ISTAT PreCert Urgency Level
Insurance Policies Note Carrier Co Carrier Name	Policy # Group Number Group Name Phone Priôrity Eligi (Bill to insurance) ▼ 04-01-2021 Stephanie.Williams -
Manage Policies IVT Notes Order Notes 04-01-2021 Stephanie Williams -	Verification not required Insurance verified Amount to collect * E

23. Once all appointment information has been entered, click "Schedule" at the bottom right side of the screen.

		-
Schedule	Modify	11
	· · · ·	- 1.

24. If any information is missing, a red exclamation will appear at the right bottom side of the page with the appointment errors. All errors must be correct before scheduling. If an there is an error the bottom right side of the screen will display the error.

Save as Order	Schedule	Close
		'Referring' is required 🝷

- 25. The "Schedule Summary" will populate with the patient's appointment confirmation details and Prep Instructions.
 - 1. recite the exams, exam date/time, and center address to the patient.
 - 2. Provide the prep instructions for all exams scheduled

Schedule Summary:	
Patient reports their weight to be Ibs.	
HOLLY TEST is scheduled for a	
Bone Density on Friday March 23, 2018 at 3:00 PM - (77080) Bone Density without IVA	for 30 minutes at Solis Mammography Southlake
Mammogram Screening Digital W/ CAD on Friday M - (G0202) MAMMOGRAM SCREEN DIGITAL	Barch 23, 2018 at 3:30 PM for 15 minutes at Solis Mammography Southlake
Address:	
Solis Mammography Southlake	
1545 E. Southlake Blvd.	
Suite 200	
Southlake TX 76092	
Prep Instructions:	Prep Instructions Reviewed
- Bone Density w/ IVA - Mammogram Screening Digital W/ CAD	
1 of 2:Bone Density w/ IVA No metal buttons or zippers below the waist. No	o calcium supplements the day of or the day before the exam.Patient must wait 10 days from their last barium contrast exan
2 of 2 Mammogram Screening Digital W/ CAD Please arrive 10-15 minutes earlier than your ap	ppointment time. For best results, do not wear talcum powder, deodorant, lotion or perfume under your arms or on your brea

26. Once the prep instructions have been provided to the patient, check the "Prep instructions reviewed"

Prep Instructions Reviewed

27. Then select "Schedule" - AT THIS POINT ALL EXAMS HAVE BEEN SCHEDULED

EDITED: 04/02/2021