Scheduling Existing Patient - New Exam - Multiple Exams
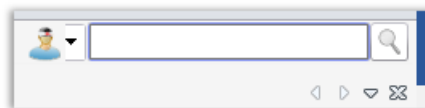
Last Modified on 04/04/2025 6:02 pm EDT

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

    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
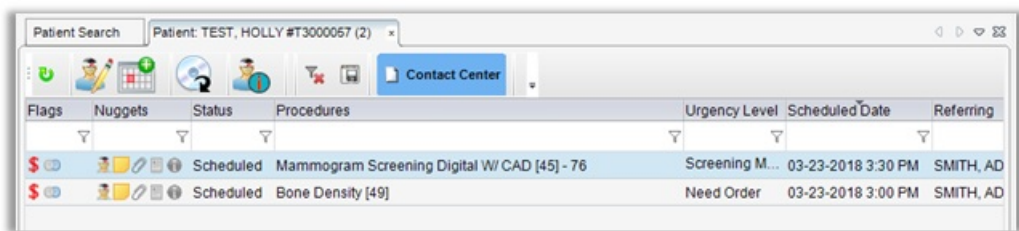
2. Results for search will display

3. Double Click on correct matching patient

4. The patient's exam history will display

5. To review demographics, click on the "Summary Nugget" (person)
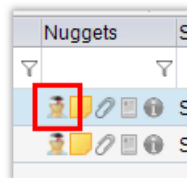
6. Patient's demographic summary will display

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"
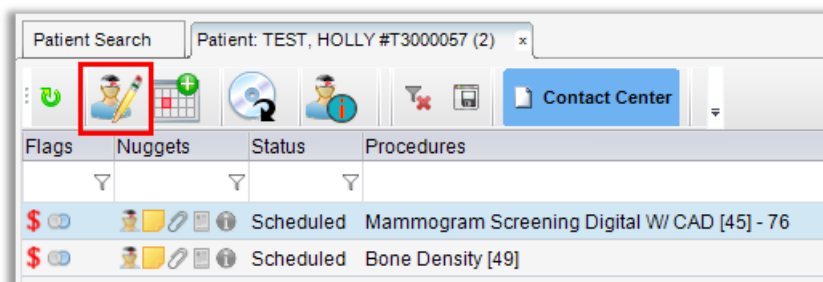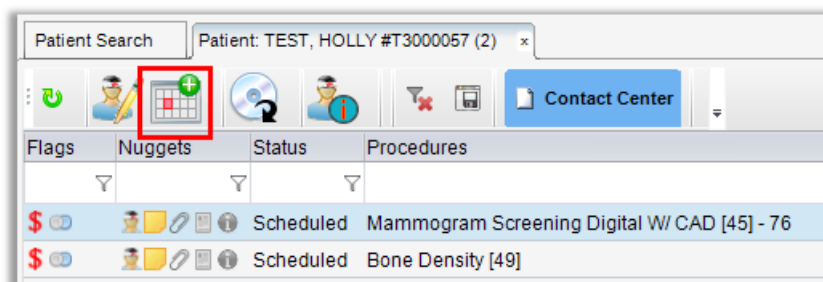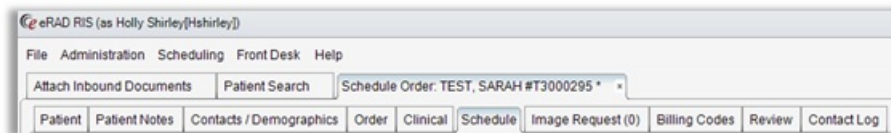
9. Review the patient history before scheduling exam

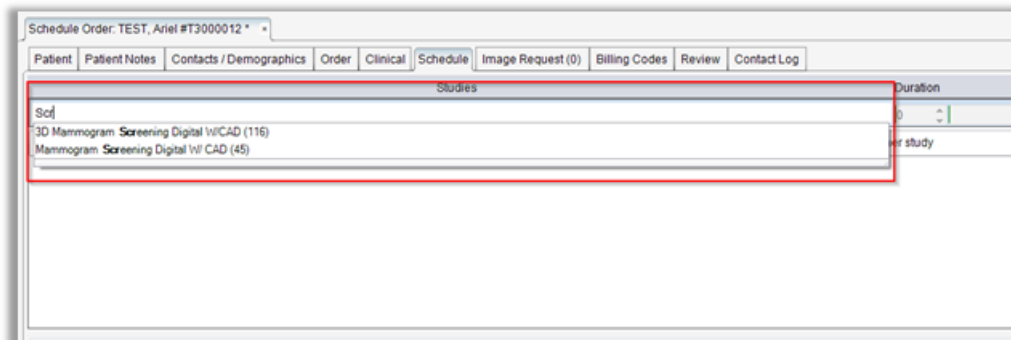10. To schedule, click on the calendar icon

11. The "Schedule Order Tab" will open

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)

13. When Exam Type requires Laterality, IMMEDIATELY select from the drop-down list (middle of page)
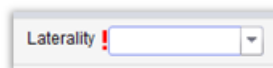
14. To add another exam, select "Click here to add another study"
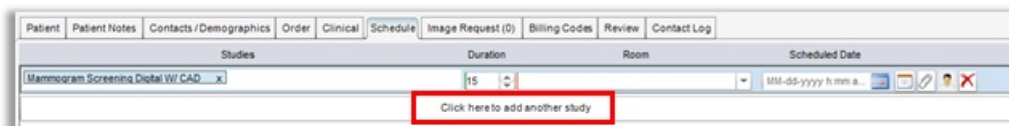
15. Search for the additional exam(s)
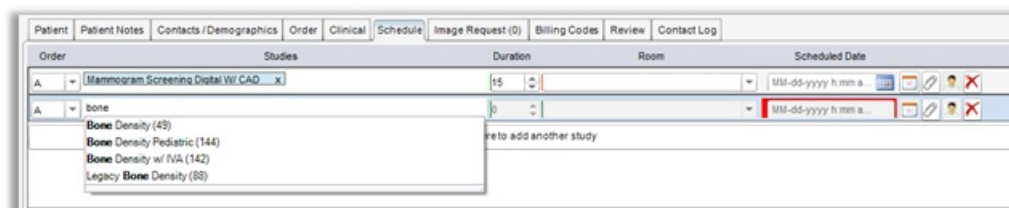
16. Note: The order in which you select the exam MATTERS. Be sure to put them in the order that they should be scheduled according to the scheduling rules. Ex: Diagnostic Mammograms are ALWAYS followed by a Breast Ultrasound

    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

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:

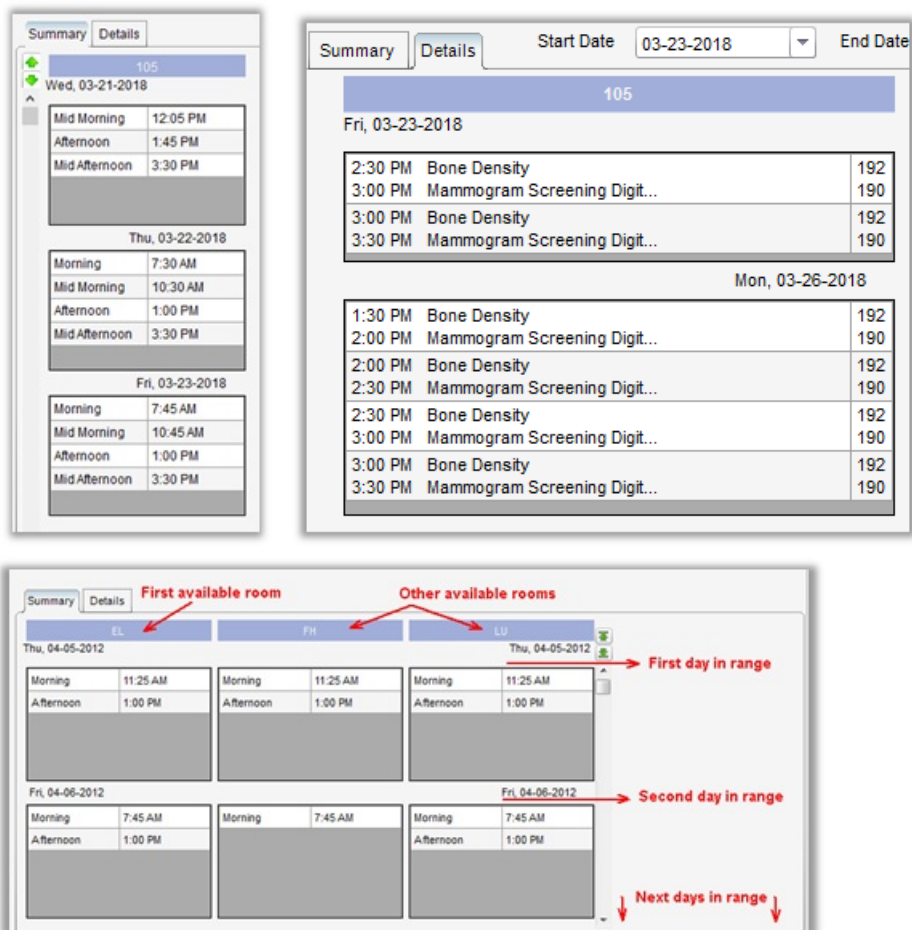   1. Summary Tab – Shows the earliest available search match in the morning, mid-morning, afternoon, and mid-afternoon

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

    2. Details Tab – Shows every search match available

    NOTE: Match times are for ALL exams selected and in the order requested!
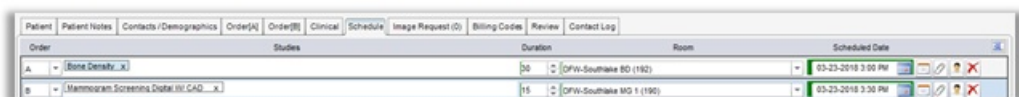
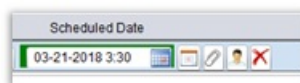   DO NOT SCHEDULE IN YELLOW SLOTS! THESE ARE BLOCKED AND NOT TO BE USED!

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"

22. On the "Order Tab", add the detailed order information

    1. <mark>Reason for Order</mark> - 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.

    2. <mark>Referring Physician Details</mark> - 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. <mark>Class</mark> – This is for the Contact Center to update if prior films are required or not.

    4. <mark>Urgency Level</mark> – This represents the call and/or order status for the exam (Priority Status)

    5. <mark>Manage Policies</mark> – This is where patient insurance information (Carrier and Policy #) will be captured

    6. <mark>Order Notes</mark> – This is for the Contact Center only! Add any notes that were collected on the call from the patient at the time of scheduling

23. Once all appointment information has been entered, click "Schedule" at the bottom right side of the screen.
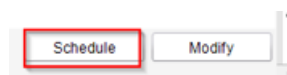
24. If any information is missing, a red exclamation will appear at the right bottom side of the page with the appointment errors. All errors must be correct before scheduling. If an there is an error the bottom right side of the screen will display the error.
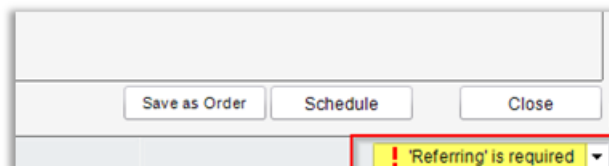
25. The "Schedule Summary" will populate with the patient's appointment confirmation details and Prep Instructions.
    1. recite the exams, exam date/time, and center address to the patient.
    2. Provide the prep instructions for all exams scheduled

Schedule Summary:

Patient reports their weight to be _lbs._
HOLLY TEST is scheduled for a
Bone Density on Friday March 23, 2018 at 3:00 PM for 30 minutes at Solis Mammography Southlake
 - (77080) Bone Density without IVA

Mammogram Screening Digital W/ CAD on Friday March 23, 2018 at 3:30 PM for 15 minutes at Solis Mammography Southlake
 - (G0202) MAMMOGRAM SCREEN DIGITAL

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 calcium supplements the day of or the day before the exam.Patient must wait 10 days from their last barium contrast exam

2 of 2:Mammogram Screening Digital W/ CAD
Please arrive 10-15 minutes earlier than your appointment time. For best results, do not wear talcum powder, deodorant, lotion or perfume under your arms or on your breas

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

☐ Prep Instructions Reviewed

27. Then select **"Schedule"** – <mark>AT THIS POINT ALL EXAMS HAVE BEEN SCHEDULED</mark>

EDITED: 04/02/2021