Rescheduling an Exam in eRAD

Last Modified on 06/10/2025 7:58 pm EDT

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Purpose: This job aid provides step-by-step instructions for Contact Center agents to properly reschedule patient exams in eRAD while ensuring that all necessary documentation and details are retained or updated appropriately.
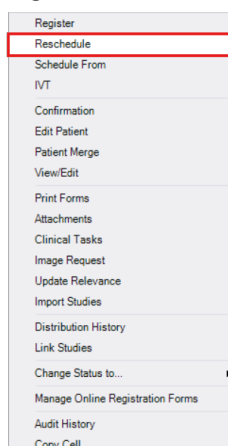
Step 1: Open the Patient Folder

1. Use the **search function** in eRAD to locate and open the correct **Patient Folder**

Step 2: Initiate the Reschedule

1. Select the exam that needs to be **rescheduled**.

2. **Right-click** and select **Reschedule** from the menu options.

3. The **Reschedule** window will populate

==NOTE: If the patient has multiple exams scheduled for the same day, a list will appear. Check the box for each exam that needs to be rescheduled.==

4. Select "**Reschedule**" as the **Reason** from the dropdown list

5. Click **[OK]**

Step 3: Reschedule the Exam

1. The **Reschedule Order tab** will open and default to the **Patient tab**

   - Confirm if there have been any changes to the contact information on file
   - Request any missing contact information

2. Click on the **Schedule tab** to search for new available dates and times.

NOTE: Location may also be updated if requested.

3. Click on the **Order Tab** to add notes under **Order Notes**

4. Click **[Schedule]**

Step 4: Confirm New Appointment Details

- On the **Schedule Summary** (confirmation) page, **verify** the following:

- Exam Type(s)
- Updated appointment date and time

- Ask the caller if they need:

- The **Center address**

- The **prep instructions** reviewed again
- The box next to "**Prep Instructions Reviewed**" should already be checked, if not, please **provide prep** and **check the box.**

- Click **[Schedule]** to complete

  Click **[Modify]** if you need to make changes to date, time, exam type, etc.

What Should Be Collected on the Order Tab During Rescheduling

- **Only collect missing information.** Do not re-enter data unless it was not captured originally.
- Verify and collect the following if missing:
  - **Reason for Order**
  - **Referring Physician**
  - **Insurance/Payor Details**

What Must Be Updated on the Order Tab When Rescheduling

- **Urgency Level** (if different from original)
- **Order Notes**
  - Include brief documentation of the reschedule and any other relevant details.

EDITED: 06/10/2025