Creating a New Patient in eRAD

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Creating a New Patient in eRAD

When creating a new patient profile in eRAD, it is important to exhaust ALL search options to assure the patient doesn't have an existing profile in our system. Be sure to search by any combination of the following criteria: First Name, Last Name, DOB, Phone #, MRN, Confirmation # or Accession #, BEFORE creating a new file.

1. Once ALL search options have been exhausted, and the patient is still unable to be located in the system, click

the "New Patient/New Appointment button

Patient Search	×	5 5	5								
Search Criteria											
<u>F</u> irst Name: Last Name: MRN:	_Search <u>O</u> th	er Variations	<u>B</u> irth Dat <u>P</u> hone # <u>Z</u> ip Code	e: 07-	-08-1960 <u>S</u> earch	<u>R</u> es	et	Ne	w Patier	nt / New App	pointment 👻
First Name	Last Name	Middle Name	Birth Date	MRN	Issuer	Gender	Address	City	State	Zip Code	Matching Alternate MRN
No patient fo	ound matching	g your search									

IMPORTANT: Information entered will only be saved if scheduling is completed!!!

2. The Schedule Order window will populate with the Patient tab displaying



3. Collect patient information to add to file

NOTE: Enter information in all caps, use patients legal name as it appears on their drivers license or state ID

- First Name
- Last Name
- Sex/Gender
- DOB
- Address City, state and county can be bypassed since entering zip will populate those fields

Primary Address	Preferences				Primary Address	Preferences			
Address 1	5001 N RIVERSIDE DR	County	Tarrant (Texas)	*	Address 1	5001 N RIVERSIDE DR	County	Tarrant (Texas)	٣
Address 2		Zip	76137		Address 2 City	Fort Worth	Zip Country	/613/ US	_
City		Country	US		State	Texas -	,		

- Phone Ability to specify a mobile number or primary number if the patient would like multiple contact numbers listed
- Email

tient Search	Schedule Order: ZTEST, JA	ANE #T4056144 *	×							
atient Patient	Notes Contacts / Demogra	phics Order Clir	nical Schedule	Image Request (0)	Billing	g Codes	Review	EMR	Contact	Log
General Informat	ion									
Prefix		9	Sex Sex	* Female	-	Issuer	r	M	RN	Active
First * LANE	:		DOB	* 07-08-1960	sys	tem	Т	4056144		\checkmark
	-		000	101-00-1300			Click here	to add a	a new row	
last " ZIES	51 		Age	61y 8m						
Viddle	Suffix	Birth place								
Disable Patie	nt Portal	Father's name								
Deceased	Claustrophobic									
Primary Address	Preferences									
Address 1	5001 N RIVERSIDE DR	County	Tarrant (Texas)	- P	hone (9	999) 999-9	9999			Edit
Address 2		Zip	76137			Mobile		No	alternate	
City	Fort Worth	Country	US	E	mail J/	NE.ZTES	ST@SOLIS	SMAMM	O.COM	Edit
	-									

- NOTE: It is best practice to verbally read back all information captured for accuracy
- 4. Once all demographic information has been captured, click on the Order tab

File Adr	ministration Me	essaging Scheduling	Front Desk	Help		
Patient Se	earch Sche	dule Order: ZTEST, JA	NE #T4056145	5* x		
Patient	Patient Notes	Contacts / Demogra	phics Order	Clinical	Schedule	Image Re
General	Information					
Prefix				؛ 濥	Sex	Female
First	* JANE			0	OOB '	07-08-196

- 5. Complete the following fields
 - Reason for Order select from dropdown or free type into field if reason provided is not on list. Copy and paste the Reason for Order into the Order Notes field

-	Ce Autotext	×
Reason for order	Description Content	
	Contains: T Contains:	Ŧ
	ABDOMINAL US NAUSEA	
03-22-2022 Stephanie.vviillams	ABDOMINAL US GALL STONES	
	ABDOMINAL US KIDNEY STONES	
	ABDOMINAL US DISTENTION	
	ABDOMINAL US AAA (ABDOMINAL AORTIC ANEUYRISM)	
	ABDOMINAL US DIARRHEA	
	ABDOMINAL US PAIN	
	ABDOMINAL US ELEVATED LIVER ENZYMES	
	BONE DENSITY SCREENING FOR OSTEOPOROSIS	
	BONE DENSITY OSTEOPOROSIS	
	BONE DENSITY OSTEOPENIA	
	BONE DENSITY BONE DISORDER	
	BONE DENSITY BONE FRACTURE	
	BONE DENSITY MENOPAUSAL STATUS	
	BONE DENSITY OTHER CONDITIONS/DISORDERS	*
	OK	Cancel

• Referring Details - add referring provider name (who will receive the report), and location

Referring De	tails	
Referring *	TEST, DOCTOR K, 👻 🔎	
Visited at *	1234 FAKE ST, Fort Worth, Texas, 76104	-
Img notes		^
		\sim
Ref. date	MM-dd-yyyy III Ord. dept.	*

• Urgency Level (status of the written order) - select from dropdown

Urgency Level	✓ Provided Education	ation
ione Priôrity Eli	Need Order Patient Bringing Order Doctor Sending Order Valid Order	
	Recall Order Issue (CC Use Only) Order Issues Faxed (CC Use Only)	
not required	WhiteRabbit	
iling Notes	1 - First Call Completed (CC Use Only)	
-2022 Stephanie.	2 - Second Call Completed (CC Use 3 - Third Call Completed (CC Use Only) Future: Apr	-

• Class (prior imaging status) - select from dropdown

Class	* <mark>O</mark> u	utpatient	-
Sedatio	on		
Tron		tpatient	
	Pe	nding Or	ders
- Prov	/ide Po	werShare	
Dillio	Pri	iors Prefe	erred
Dillin		Priors	
Bill t	o ir Pri	iors Requ	ested
03-22	2-20 Pri	iors Rece	ived
] Step	han Pri	iors Not N	leeded
	Pri	iors Requ	ired
	_		

• Manage Policies (insurance coverage)

Insu	urance P	olicies			
	Note	Carrier	Co	Carrier Name	Polic
N	lanage F	olicies	1	IVT Notes	
_					

• Order Notes - add documentation, including Reason for Order and any other relevant information



6. Once all fields on the Order tab have been completed, click on the Schedule tab

File	Administration	Messaging	Scheduling	Fron	t Desk	Help		
Patien	t Search 🗙 Sc	hedule Orde	r: ZTEST, JAI	NE #T	4056145	* x		
Patier	nt Patient Note:	s Contacts	s / Demograp	hics	Order	Clinical	Schedule	Image R
Ctud	ico			Dur	ation D	laam		e

- 7. Complete the following fields
 - $\circ~$ Studies type in the exam that the patient is being scheduled for

Patient S	earch	Sche	dule Order: ZTEST	, JA	NE #T	405614	5* X					
Patient	Patient N	lotes	Contacts / Demo	grap	hics	Order	Clinical	Schedule	Image Request (0)	Billing Codes	Review	EMR
Studies			1	Duration Room Scheduled Date					ate			
3D Mamn	3D Mammogram Screening Digital W/C x				¢	MM-dd-yyyy h:mm am/pm					0 🙎 🗙	
					(Click her	e to add a	another study	1			

NOTE: If needing to schedule more than one exam, click "Click here to add another study"

Patient S	earch Sche	dule Order: ZTE	ST, JANI	E #T405	6145 * ×							
Patient	Patient Notes	Contacts / Der	nographi	ics Or	der Clinical	Schedule	Image Request (0)	Billing Codes	Review	EMR		
Studies	Studies Duration Room Scheduled Date											
3D Mamm	30 Mammogram Screening Digital W/C x 15 + MM-dd-yyyy h:mm am/pm											
	Click here to add another study											

• Laterality - only required when scheduling a mammogram

Body part	Breast	✓ Latera	ality 👻

• Use the Search Options to search a specific location, dates and/or times

Search Options	Region – Solis Mammography
Region	Practice – Select correct area to schedule from dropdown
Solis Mammography *	 Site – Location where nations will be scheduled
Practice Osite group	Minutes between studies. Minimum and maximum amount of
(all) 👻	 Willingtes between studies – Willingten and maximum amount of time between sugges (defaults to men of CO)
Site	time between exams (defaults to max of 60)
(all) 👻	 Day and time options – Selections made on patient preferences
Minutes between studies	 Search Range – Specific date range to search (defaults to search 5
Min 0 🗘 Max 60 🇘	business days at a time)
Day and time options Monday Tuesday V Wednesday Thursday Friday Saturday Saturday Sunday	
Search Range	
Start Date 03-22-2022 *	
End Date 03-26-2022 -	
\Rightarrow Search 🔶	

• Once completed, click Search



8. Available appointment times will display on the lower, left-hand portion of the Schedule tab NOTE: Click on the Details tab to view additional times for the dates selected

ummary Details	5	Sur	nmary Deta	ils		
1 Tue, 03-22-20	16 22		DFW-ALLIA	NCE MG 1	DFW-ALLIA	116 NCE MG
Mid Morning	11:15 AM		Tue, 03-22-2	.022		1.5
Afternoon	1:00 PM		11:15 AM	15	11:15 AM	15
Mid Aftern	3:30 PM		11:30 AM	15	11:30 AM	15
			11:45 AM	15	11:45 AM	15
			12:00 PM	15	1:00 PM	15
10/- 1			12:15 PM	15	1:15 PM	15
Wed,	03-23-2022		12:30 PM	15	1:30 PM	15
Morning	8:00 AM		12:45 PM	15	1:45 PM	15
Mid Morning	10:30 AM		1:00 PM	15	2:00 PM	15
Afternoon	1:00 PM		1:15 PM	15	2:15 PM	15
Mid Aftern	3:30 PM		1:30 PM	15	2:30 PM	15
			1:45 PM	15	2:45 PM	15

- DO NOT SCHEDULE IN YELLOW SLOTS! THESE ARE BLOCKED AND NOT TO BE USED!
- Select a time by clicking once, selection will highlight blue



• The Scheduled Date will display the selected date and time at the top (near Studies)

Patient 5	earcn Sche	dule Urder: ZIESI, JANE #	4056145	o^ x_				
Patient	Patient Notes	Contacts / Demographics	Order	Clinical	Schedule	Image Request (0)	Billing Codes	Revie
Studies			Durati	on Room	1	Sch	eduled Date	
3D Mamm	nogram Screening Di	iqital W/CAD(Br x 15	¢ N	LIANCE M	G 1 (227) 🔻	03-22-2022 3:30 PM	N I	

9. Once all required fields have been completed on the Order tab and Schedule Tab, click Schedule on the lower, right-hand corner



NOTE: Do not click Save as Order - no appointment will be scheduled. Clicking close will back out of the scheduling process and all patient information entered will be lost.

10. The Schedule Summary (confirmation) will display - EXAM IS NOT SCHEDULED YET!

Ce Review		-		×
Schedule Summary:				
Patient reports their weight to be Bs. JANE ZTEST is scheduled for a 3D Mammogram Screening Digital W/CAD on Tuesday March 22, 2022 at 3:30 PM for 15 m (7/7063) Tomosynthesis Mammogram Screening with or without CAD - (7/7067) Mammogram Screening with or without CAD	inutes at DFW-Alliance			•
Address:				
DFW-Alliance 3025 North Tarrant Pkwy, Suite 250				Ŧ
Prep Instructions:	Prep Instructions Reviewed			
3D Mammogram Screening Digital W/CAD				
Please arrive 10-15 minutes earlier than your appointment time. For best result	lts, do not wear talcum powder, deodorant, lotion or perfume under your arms or on your	breas	ts on	the
<	Schedule	Mo	dify	>
	Schedule	WO	any	

- Confirm the following information
 - Exam type(s)
 - Scheduled Date
 - Scheduled Time(s)
 - Offer the Center address

- Provide Prep Instructions and check the "Prep Instructions Reviewed" box
- Once confirmation is provided, click Schedule

	>
Schedule	Modify

NOTE: Clicking Modify will close the Schedule Summary window and take you back to the last tab you were on for scheduling. This option allows you to make any necessary updates to the exam type, date or time selected.

- 11. Once the exam is scheduled, you will be returned to the Patient search window
 - Click Search (original search criteria should still be populated in the respective fields)

File Adminis	tration N	lessaging	Scheduling	Front Desk	Help	
Patient Search	x					
Search Criteria	a					
<u>F</u> irst Name:				Birth Date:	07-08-1960	
Last Name:			E	Phone #:		
	Searc	h <u>O</u> ther Var	iations	Zip Code:		
MRN:					<u>S</u> earch	<u>R</u> eset

 $\circ~$ The new patient profile will now display in the search results

Search Criteria										
<u>F</u> irst Name:		Ð	<u>B</u> irth Date:	07-08-196	0					
Last Name:	Carach Oth	as Variations	Phone #:							
MDN	Search <u>O</u> th	er variations	Zip Code:	0			No. Defect (N	A		
IVIRIN.				Search		eset	New Patient / New	Appointment	•	
First Name	Last Name	Middle Name	Birth Date	MRN	Issuer	Gender	Address	City	State	Zip C

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