

Creating & Scheduling a New Patient in eRAD

Last Modified on 06/10/2025 9:53 pm EDT



Creating & Scheduling a New Patient in eRAD

Purpose: Creating a new patient profile in eRAD should only occur after confirming the patient does not already exist in the system. Follow the step below to ensure proper search and accuracy of capturing patient information.

Step 1: Exhaust All Search Options

Before creating a new **Patient Folder**, search using **multiple combinations** of the following:

- First Name + Last Name
- Date of Birth
- Phone Number
- Medical Record Number (MRN - formerly known as Jacket Number)
- Accession Number (also known as confirmation number)

The screenshot shows the "Patient Search" window in the eRAD system. The "Search Criteria" section includes fields for First Name (MISTY), Last Name (ZTEST), Birth Date (08-25-1985), Phone #, Zip Code, and MRN. There is a checkbox for "Search Other Variations" which is checked. Below the search criteria are "Search" and "Reset" buttons, and a dropdown menu for "New Patient / New Appointment". At the bottom, a table lists search results with columns: First Name, Last Name, Middle Name, Birth Date, MRN, Issuer, Gender, Address, City, State, Zip Code, Matching Alternate MRN, and Matching Alternat. A message box at the bottom of the table states "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 Alternat
No patient found matching your search												

Only create a new patient profile if the patient is NOT found after exhausting all search options.

Step 2: Begin New Patient Entry

Click [New Patient/New Appointment] if the patient cannot be located

New Patient / New Appointment

Important: Information will only be saved if the scheduling process is fully completed. Incomplete workflows will not retain data.

Step 3: Complete the Patient Tab

The **Schedule Order Tab** will open, displaying the **Patient tab**. Enter demographic information in **ALL CAPS** using the **patient's legal name** (as shown on their driver's license or government-issued photo ID):

Patient Search | **Schedule Order: ZTEST, MISTY #T6457776** X

ZTEST, MISTY | 08-29-1985 (39y9m) | Female | #T6457776

Patient | Patient Notes | Contacts / Demographics | Order | Clinical | Schedule | Image Request (0) | Billing Codes | Review | Contact Log

General Information

Prefix: [] Sex: Female Issuer: system MRN: T6457776 Active: [x]
First: MISTY DOB: 08-29-1985
Last: ZTEST Age: 39y 9m
Middle: [] Suffix: [] Birth place: []
☐ Disable Patient Portal Father's name: []
☐ Deceased ☐ Claustrophobic

Primary Address | Preferences

Address 1: 1234 FAKE LN.
Address 2: []
City: Washington
State: Washington D.C.
County: District of Columbia (Washington D.C.)
Zip: 20002
Country: US

Phone (in order of preference)

Description	Phone	Cell?
Mobile	(123) 333-3333	[x]
Alternate	[]	[]

Click here to add a new row

Email (in order of preference)

Email
STEPHANIE.JOHNSON2@SOLISMAMMO.COM

Click here to add a new row

Patient Origin

Preferred language: []
Education level: []
Religion: []
Ethnicity: []
Race: []
Sexual orientation: []
Gender identity: []

Family History

Relationship	Family History	Age At Diagnosis	Age At Death
[]	[]	[]	[]

Request SecurePIC | Save as Order | Schedule | Close

- First Name
- Last Name
- Sex/Gender
- Date of Birth
- Address (typing the zip code into the appropriate field will auto-populate the City, State, and County)
- Phone number (specify mobile)
- Email Address
- Preferred Language (if not English)

Best Practice: Verbally verify all information by reading it back to the patient for accuracy.

Step 4: Complete the Schedule Tab

- **Add Study (Exam Type):**

Patient Search: Schedule Order: ZTEST, MISTY #T6457776 * X

ZTEST, MISTY | 08-29-1985 (39y 9m) | Female | #T6457776

Patient | Patient Notes | Contacts / Demographics | Order | Clinical | **Schedule** | Image Request (0) | Billing Codes | Review | Extra Data | Contact Log

Studies	Duration	Room	Scheduled Date
3D Mammogram Screening Digital W/CAD(...) x	15		MM-dd-yyyy h:mm am/pm

[Click here to add another study](#)

- Type in the exam name(s) or exam code(s)
- To add more than one exam, click "**Click here to add another study**"

- **Laterality (for mammograms only)**

Laterality *!

- Bilateral
- Bilateral Implants
- Left
- Left Implant
- Right
- Right Implant

- **Set Search Criteria**

Search Options

Region: Solis Mammography

☒ Practice ☐ Site group

Washington Radiology

Site: DC-2141 K ST

Minutes between studies: Min 0 Max 60

Day and time options:

<input checked="" type="checkbox"/> Monday	Monday
<input checked="" type="checkbox"/> Tuesday	Earliest
<input checked="" type="checkbox"/> Wednesday	6:00 AM
<input checked="" type="checkbox"/> Thursday	Latest
<input checked="" type="checkbox"/> Friday	10:00 PM
<input checked="" type="checkbox"/> Saturday	
<input checked="" type="checkbox"/> Sunday	

Search Range:

Start Date: 06-16-2025

End Date: 06-20-2025

Search

- Select preferred location, date, and/or time.

- **Click [Search]**

- Available appointment times will display on the lower-left of the the window

3D Mammogram Screening Digital W/CAD

Appointment Times

Summary

Details

285

Mon, 06-16-2025

Morning	6:45 AM
Mid Morning	10:30 AM
Afternoon	1:00 PM
Mid Afternoon	3:30 PM

Tue, 06-17-2025

Morning	6:45 AM
Mid Morning	10:30 AM
Afternoon	1:00 PM
Mid Afternoon	3:30 PM

Wed, 06-18-2025

Morning	6:45 AM
Mid Morning	10:30 AM

3D Mammogram Screening Digital W/CAD

Appointment Times

Summary

Details

285

DC-2141 K ST MG 1

Mon, 06-16-2025

6:45 AM	15
7:00 AM	15
7:15 AM	15
7:30 AM	15
7:45 AM	15
8:00 AM	15
8:15 AM	15
8:30 AM	15
8:45 AM	15
9:00 AM	15
9:15 AM	15
9:30 AM	15
9:45 AM	15

- **Summary Tab:** Shows first AM, mid-AM, PM, mid-PM, etc.
- **Details Tab:** Shows ALL available appointment slots

- **Select the desired time (click once, it will highlight blue)**

Patient Search

Schedule Order: ZTEST, MISTY #T6457776

ZTEST, MISTY | 08-29-1985 (39y 9m) | Female | #T6457776

Patient

Patient Notes

Contacts / Demographics

Order

Clinical

Schedule

Image Request (0)

Billing Codes

Review

Extra Data

Contact Log

Studies

Duration

Room

Scheduled Date

3D Mammogram Screening Digital W/CAD

15

C-2141 K ST MG 1 (929)

06-16-2025 8:30 AM

Click here to add another study

3D Mammogram Screening Digital W/CAD

Appointment Times

Summary

Details

285

DC-2141 K ST MG 1

Mon, 06-16-2025

6:45 AM	15
7:00 AM	15
7:15 AM	15
7:30 AM	15
7:45 AM	15
8:00 AM	15
8:15 AM	15
8:30 AM	15
8:45 AM	15
9:00 AM	15
9:15 AM	15
9:30 AM	15
9:45 AM	15

Request SecurePIC

Save as Order

Schedule

Close

Search Options

Region

Solis Mammography

Practice

Site group

Washington Radiology

Site

DC-2141 K ST

Minutes between studies

Min 0

Max 60

Day and time options

Monday

Tuesday

Wednesday

Thursday

Friday

Saturday

Sunday

Monday

Earliest

6:00 AM

Latest

10:00 PM

Search Range

Start Date

06-16-2025

End Date

06-20-2025

Search

Step 5: Complete Exam Questionnaires (If Applicable)

If a questionnaire is associated with the exam(s) selected, an additional tab will appear for each exam that has an associated questionnaire once a time is selected:

Patient Search Patient: ZTEST, MISTY #T6457776 (2) Schedule Order: ZTEST, MISTY #T6457776 X

ZTEST, MISTY | 08-29-1985 (39y9m) | Female | #T6457776

Patient Patient Notes Contacts/Demographics Order Clinical Schedule Image Request (0) Billing Codes Review Extra Data Contact Log *Solis- DEXA

Page 1

DEXA

Have you had any exam using ingested barium within the past 7 days? ☐ Yes ☒ No

You may proceed with scheduling this appointment.

- Ask the patient the required questions
- Accurately enter their responses into eRAD
- **You must complete the questionnaire before proceeding.**
- **You cannot save or finalize without entering questionnaire responses when required.**

Step 6: Complete the Order Tab

Fill in all required information:

- Reason for Order

Reason for order

06-09-2025 stephanie.johnson2 - ANNUAL/ROUTINE SCREENING MAMMOGRAM

- Select from the dropdown or free-type if reason is not listed in dropdown options

- Referring Details

Referring Details

Referring * TEST, DOCTOR K.

Visited at * 1234 FAKE ST, Fort Worth, Texas, 76104

Img notes

Ref. date MM-dd-yyyy Ord. dept.

- Add the referring providers name
- Confirm a portion of the providers address to assure confidential reports are sent to the intended office

- Urgency Level (Order Status)

- Choose based on whether an order is provide or pending (e.g., Order Attached, Need Order, etc.)

- **Class (Prior Imaging Status)**

- Select the appropriate Class based on whether outside related imaging is necessary for comparison purposes

- **Manage Policies/Billing Method**

- Click **[Manage Policies]** to add payor information (insurance, non-profit, etc.), **OR**
- Change dropdown under "**Billing Method**" to convert patient to self-pay if insurance is not available.

- **Order Notes**

- Add notes related to the exam
 - *"PT AWARE OF PREP - ADVISED TO BRING INS CARD, PHOTO ID, AND ORDER TO EXAM"*

Step 7: Finalize & Confirm Appointment

- Click **[Schedule]** in the bottom right

- Do **not** click **[Save as Order]** or **[Close]** - doing so will **not save** the appointment

Step 8: Schedule Summary (Confirmation Screen)

Before finalizing, confirm:

Review

Schedule Summary:

Patient reports their weight to be lbs.

MISTY ZTEST is scheduled for a
3D Mammogram Screening Digital W/CAD on Monday June 16, 2025 at 8:30 AM for 15 minutes at DC-2141 K ST

- (77063) Tomosynthesis Mammogram Screening with or without CAD
- (77067) Mammogram Screening with or without CAD

Address:

DC-2141 K ST
2141 K ST NW
Suite 900
WASHINGTON DC 20037

Prep Instructions: ☐ Prep Instructions Reviewed

3D 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 breasts on the day of your appointment. Also, please make arrangements to have onsite

Schedule Modify

- Exam type(s)
- Scheduled date and time
- Center name
 - Offer address
- Prep Instructions
 - Check the "Prep Instructions Reviewed" box
- Click [Schedule] to complete
 - Click [Modify] if you need to make changes to date, time, exam type, etc.

Step 9: Verify Patient Profile was Created

You'll return to the Patient Search tab:

Patient Search X

Search Criteria

First Name: MISTY Birth Date: 08-29-1985

Last Name: ZTEST Phone #:

☒ Search Other Variations Zip Code:

MRN: Search Reset New Patient / New Appointment

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 MRN	Matching Alternate MRN Issuer	Phone Numbers	Email Address
MISTY	ZTEST		08-29-1985	T6457774	system	F	1234 FAKE ST	Washington	DC	20002					(123) 999-5555 (primary)/(mobile)	STEPHANIE.JOHNSON2@S

- Click [Search] (your previous search details remain populated)
- The new profile should now display in the results

EDITED: 06/09/2025