

# Scheduling an Existing Patient (Single or Multiple Exams)

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## Scheduling an Existing Patient (Single or Multiple Exams)

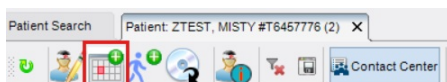
**Purpose:** To guide agents through accurately searching for an existing patient and scheduling either a single exam or multiple exams in eRAD.

### Step 1: Open the Patient Folder

- Use the search function in eRAD to locate and open the correct Patient Folder.
- Always search first to avoid creating duplicate records and to view the patient's history.

### Step 2: Confirm/Update Patient Contact Information

1. Click the **New Appointment** button from the toolbar to open the **Schedule Order Tab**



2. **Review/Update** patient contact information on the **Order Tab**

A screenshot of the Patient Order Tab in eRAD. The patient information is displayed at the top: "ZTEST, MISTY | 08-29-1985 (39y 9m) | Female | #T6457776". Below this is a tabbed interface with "Patient" selected. The "General Information" section contains fields for Prefix, First, Last, Middle, Suffix, Birth place, Sex, DOB, Age, and Father's name. The "Primary Address" section contains fields for Address 1, Address 2, City, State, County, Zip, and Country. The "Phone" section contains fields for Description, Phone, and Cell?. The "Email" section contains fields for Email and a "Click here to add a new row" link. The "Schedule Order" tab is highlighted with a red box. The "Schedule Order" tab contains a table with columns for Description, Phone, and Cell?. The "Schedule Order" tab is highlighted with a red box. The "Schedule Order" tab contains a table with columns for Description, Phone, and Cell?. The "Schedule Order" tab is highlighted with a red box.

### Step 3: Complete the Schedule Tab

## 1. Navigate to the Schedule Tab

Patient Search | Patient: ZTEST, MISTY #T6457776 (2) | 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

### a. 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] | 15 | | MM-dd-yyyy h:mm am/pm  
 Click here to add another study

- In the **Studies** box, type the exam name (list will filter as you type) Select the correct exam.
- If **Laterality** is required, select from the dropdown.
- For **multiple exams**:
  - Click "**Click here to add another study**"
  - Follow the above steps to search for and select the additional exam(s)
- **IMPORTANT**: Exams will schedule in the order they appear:
  - **Top exam** = scheduled first
  - **Subsequent exams** follow

### b. Set Appointment Preferences:

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  
 Earliest 6:00 AM Latest 10:00 PM  
 Search Range  
 Start Date 07-14-2025 End Date 07-18-2025  
 Search

- **Region**: Solis Mammography
- **Practice**: Washington Radiology
- **Site**: Select the location where the patient would like to be seen  
**DO NOT** select Progressive Radiology (PR) locations
- **Day and time options**: Select preferred days of the week or times of day
- **Search Range**: Search anywhere from 1-30 days at a time
- Click **[Search]**

### c. Appointment Times:

- **Summary Tab**: Shows first AM, mid-AM, PM, mid-PM, etc.

- **Details Tab: Shows ALL available appointment slots**

The left screenshot shows the 'Summary' tab with a list of times for Monday, Tuesday, and Wednesday. The right screenshot shows the 'Details' tab with a grid of times and durations.

- Click on the desired time once to select (it will highlight blue)

The screenshot shows the 'Details' tab with a time slot highlighted in blue.

- Appointment details will appear in the top pane

The screenshot shows the 'Appointment Details' window with the 'Studies' tab selected. The 'Duration' is set to 30, the 'Room' is DC-2141 K ST BD 1 (936), and the 'Scheduled Date' is 07-16-2025 6:45 AM.

## Step 4: Complete Exam Questionnaire (if applicable; if no questionnaire, skip to Step 5)

### 1. Navigate to the Exam Questionnaire (if applicable)

The screenshot shows the 'Exam Questionnaire' window with the 'DEXA' section selected. The question is: 'Have you had any exam using ingested barium within the past 7 days?'. The 'No' radio button is selected. A yellow message box says: '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.**

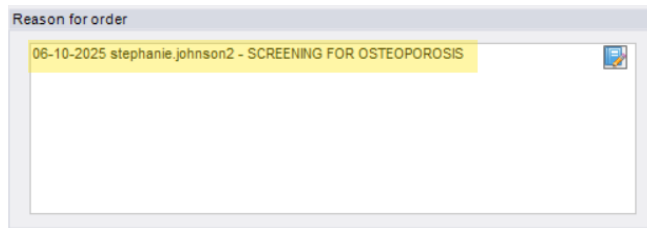
## Step 5: Complete the Order Tab

### 1. Navigate to the Order Tab

The screenshot shows the 'Appointment Details' window with the 'Order' tab selected.

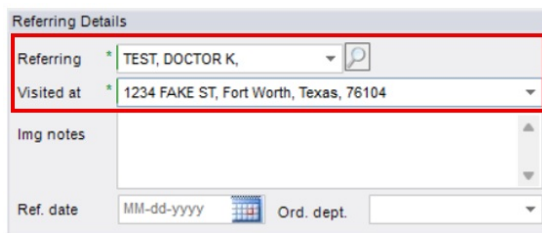
a. Complete all required fields:

- Reason for Order



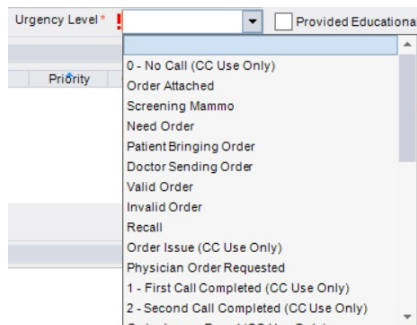
- Select from the dropdown or free-type if reason is not listed in dropdown options

- Referring Details



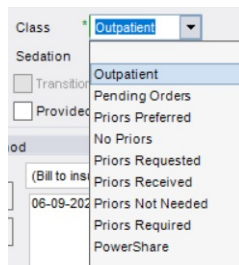
- Add the referring providers name
- Confirm a portion of the providers address to assure confidential reports are sent to the intended office

- 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

Insurance Policies

Note	Carrier Code	Carrier Name	Policy #	Group Number	Group Name	Phone	Priority	Card	Eligibility	Billing Method
										<div> <div>Bill to Insurance</div> <div>(Bill to Insurance)</div> <div>Self Pay</div> </div>

Manage Policies IVT Notes Verify

Amount to collect \*

- 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

Order Notes

06-09-2025 stephanie.johnson2 - PT AWARE OF PREP - ADVISED TO BRING INS CARD, PHOTO ID, AND ORDER

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

## Step 6: Finalize & Confirm Appointment

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

Save as Order Schedule Close

- 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.

**MBSTY Z TEST** is scheduled for a Bone Density on Wednesday, July 16, 2025 at 6:45 AM for 30 minutes at DC-2141 K ST - (77080) Bone Density without IV A

Address:

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

Prep Instructions: ☐ Prep Instructions Reviewed

Bone Density

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 before scheduling a bone density exam.

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.

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