

Scheduling Existing Patient - New Exam - Single Exam

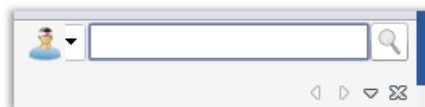
Last Modified on 04/04/2025 6:02 pm EDT



Contact Center
Scheduling in eRAD RIS
Existing Patient - New Exam - Single Exam

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

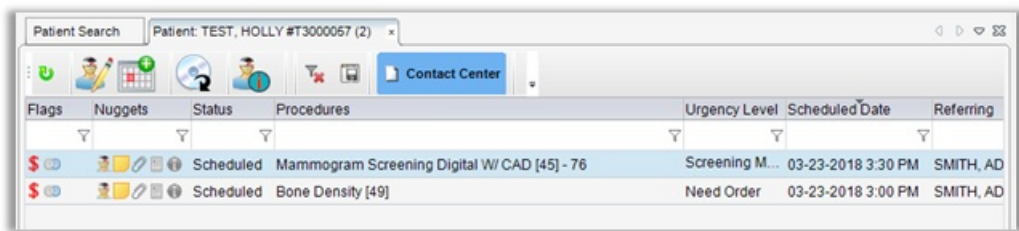
A screenshot of a "Patient Search" window. The "Search Criteria" section includes fields for First Name (HOLLY), Last Name (TEST), Birth Date (MM-dd-yyyy), Phone #, Zip Code, and MRN. There is a checkbox for "Search Other Variations" and buttons for "Search" and "Reset". A dropdown menu shows "New Patient / New Appointment". Below the search criteria is a table with patient search results.

First Name	Last Name	Middle Name	Birth Date	MRN	Issuer	Gender	Address	City	State	Zip Code	Matching Altern
HOLLY	TEST		04-29-1960	T3000057	system	F	15601 DALLAS PARKWAY	Addison	TX	75001	MRN

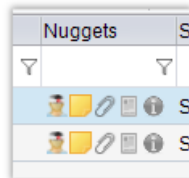
3. Double click on correct matching patient

A screenshot of a "Patient Search" window, identical to the one above, showing the same search criteria and results table.

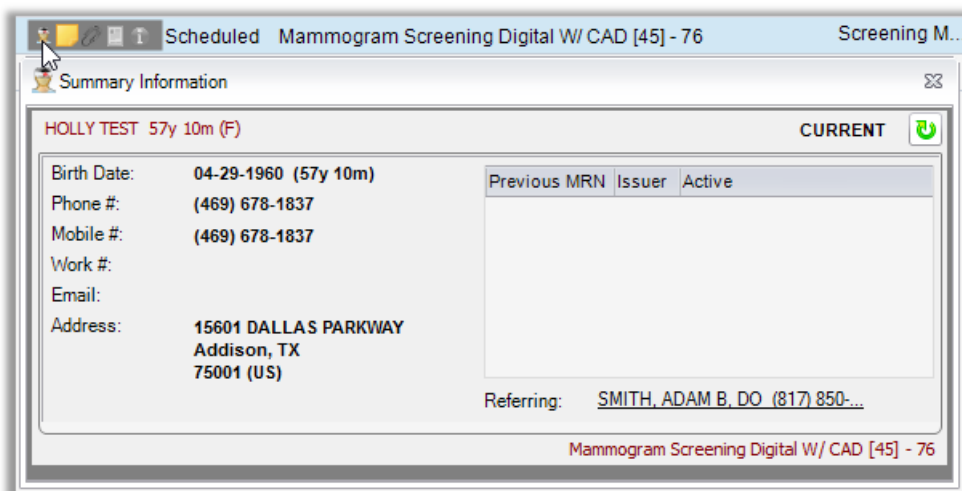
4. The patient's exam history will display



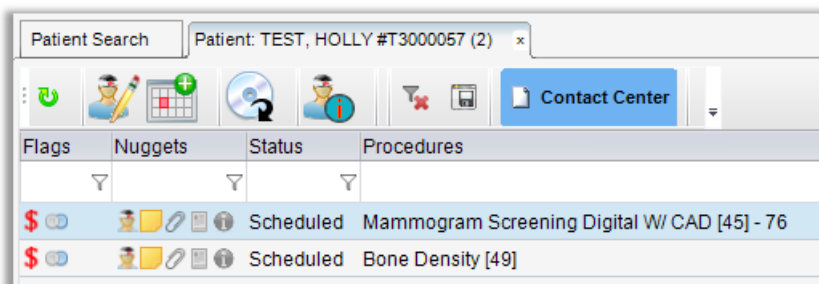
5. To review demographics, click on the Summary Nugget (person)



6. Patient's demographic summary will display



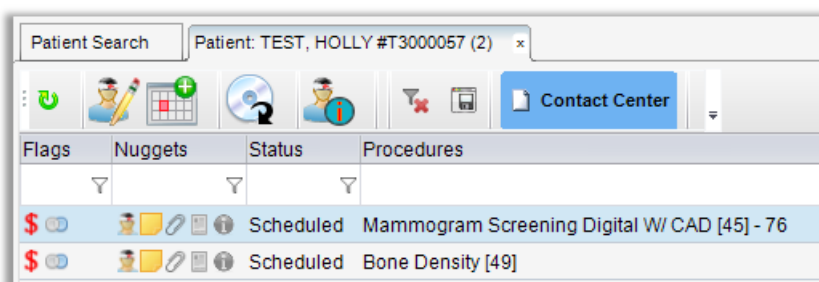
7. If needing to edit existing demographics, click on the Edit Patient (person with pencil) icon



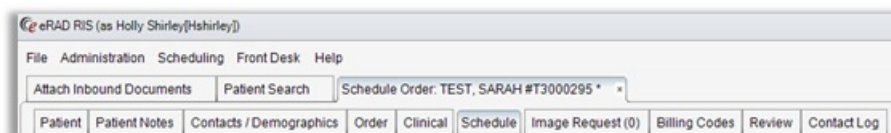
8. The "Patient Tab" will open to allow updates and "Save"

9. Review the patient history before scheduling exam

10. To schedule, click on the calendar icon

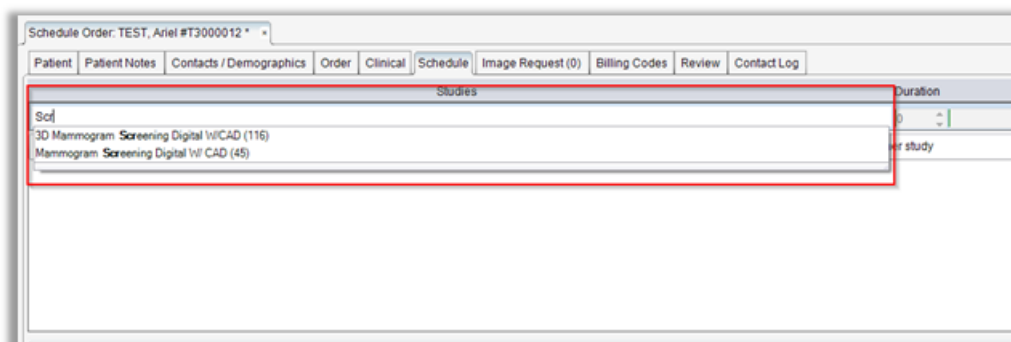


11. The “Scheduling Order Tab” will open



12. On the Scheduling Tab,

1. Search for the exam you are needing to schedule by typing the exam.
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. 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 the patient's 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”

14. Two Search Functions are available:

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

DO NOT SCHEDULE IN YELLOW SLOTS! THESE ARE BLOCKED AND NOT TO BE USED

Summary Details

105

Wed, 03-21-2018

Mid Morning	12:05 PM
Afternoon	1:45 PM
Mid Afternoon	3:30 PM

Thu, 03-22-2018

Morning	7:30 AM
Mid Morning	10:30 AM
Afternoon	1:00 PM
Mid Afternoon	3:30 PM

Fri, 03-23-2018

Morning	7:45 AM
Mid Morning	10:45 AM
Afternoon	1:00 PM
Mid Afternoon	3:30 PM

Summary Details Start Date 03-23-2018 End Date

105

Fri, 03-23-2018

2:30 PM	Bone Density	192
3:00 PM	Mammogram Screening Digit...	190
3:00 PM	Bone Density	192
3:30 PM	Mammogram Screening Digit...	190

Mon, 03-26-2018

1:30 PM	Bone Density	192
2:00 PM	Mammogram Screening Digit...	190
2:00 PM	Bone Density	192
2:30 PM	Mammogram Screening Digit...	190
2:30 PM	Bone Density	192
3:00 PM	Mammogram Screening Digit...	190
3:00 PM	Bone Density	192
3:30 PM	Mammogram Screening Digit...	190

Summary Details

First available room Other available rooms

EL FH LU

Thu, 04-05-2012

Morning	11:25 AM
Afternoon	1:00 PM

Fri, 04-06-2012

Morning	7:45 AM
Afternoon	1:00 PM

First day in range

Second day in range

Next days in range

15. 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)

File Administration Scheduling Front Desk Help

Attach Inbound Documents Patient Search Schedule Order TEST_SARVAH#7300295

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

Studies Duration Rooms Scheduled Date

195 03-21-2018 3:30

Click here to add another study

16. To delete an appointment, select the red X

Scheduled Date

03-21-2018 3:30

Calendar icon Edit icon Delete icon (Red X)

17. For Mammograms, select the Laterality from the drop-down list (middle of page)

Laterality !

Drop-down arrow

18. Click on the "Order Tab"

19. On the “Order Tab”, add the order detailed information.

1. **Reason for Order** - 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. **Referring Physician Details** - 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. **Class** - This is for the Contact Center to update if prior films are required or not.
4. **Urgency Level** - This represents the call and/or order status for the exam (Priority Status)
5. **Manage Policies** - This is where patient insurance information (Carrier and Policy #) will be captured
6. **Order Notes** - This is for the Contact Center only! Add any notes that were collected on the call from the patient at the time of scheduling

The screenshot shows the 'Schedule Order' form with the following sections and highlighted fields:

- Reason for order:** 04-01-2021 Stephanie.Williams -
- Referring Details:**
 - Referring: [Redacted]
 - Visited at: [Redacted]
 - Ref. date: MM-dd-yyyy
 - Ord. dept.: [Redacted]
- Urgency Level:** [Redacted]
- Class:** Outpatient
- Order Notes:** 04-01-2021 Stephanie.Williams -

20. Once all appointment information has been entered, click “Schedule” at the bottom right side of the screen.

The image shows two buttons: 'Schedule' and 'Modify'. The 'Schedule' button is highlighted with a red box.

21. 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.

The image shows the bottom right corner of the form. It includes buttons for 'Save as Order', 'Schedule', and 'Close'. Below these buttons, a red error message is displayed: '! 'Referring' is required'.

22. 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:

Ariel Test is scheduled for a
Mammogram Screening Digital W/ CAD on Monday March 05, 2018 at 9:15 AM for 15 minutes at Solis Mammography Southlake
 - (G0202) MAMMOGRAM SCREEN DIGITAL

Bone Density on Monday March 05, 2018 at 1:30 PM for 30 minutes at Solis Mammography Southlake

Address:

Solis Mammography Southlake
 1545 E. Southlake Blvd., Suite 200

Southlake TX 76092

Prep Instructions:

- Mammogram Screening Digital W/ CAD
 - Bone Density w/ IVA

1 of 2: Mammogram Screening Digital W/ CAD
 Please arrive 10-15 minutes ea
 2 of 2: Bone Density w/ IVA
 No metal buttons or zippers be

☐ Prep Instructions Reviewed

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

☐ Prep Instructions Reviewed

24. Then select "Schedule" – **AT THIS POINT EXAM HAS BEEN SCHEDULED**

Schedule

EDITED: 04/02/2021