

# Scheduling New Patient - New Exam - Multiple Exams

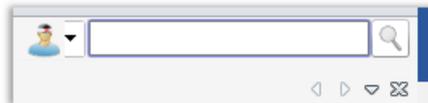
Last Modified on 04/04/2025 6:02 pm EDT



Contact Center  
Scheduling in eRAD RIS  
New Patient - New Exam - Multiple Exams

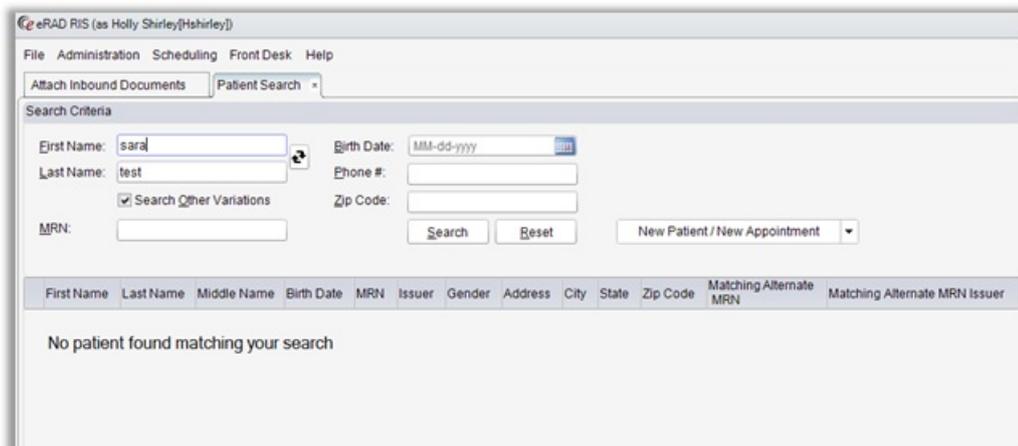
When scheduling a patient, it is always best practice to search for the patient in the system first. This will help to identify whether the patient is existing or new and can provide the details of the patient's history.

1. Search for the patient using the search bar in the top right corner

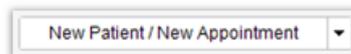


1. Search by Date of Birth
  1. 2 digit month/2 digit day/four digit year
  2. Ex: 07/08/1960 or 07-08-1960

2. Results for search will display



3. If there are no matches, select "New Patient/Appointment"



4. The "Patient Tab" will open

eRAD RIS (as Holly Shirley[Hshirley])

File Administration Scheduling Front Desk Help

Attach Inbound Documents Patient Search Schedule Order: TEST, sara #T3000295

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

**General Information**

Prefix  First \*sara Sex  Last \*test DOB  MM-dd-yyyy

Middle  Suffix  Birth place  Father's name

Disable Patient Portal  Deceased  Claustrophobic

Issuer  MRN  Active

system T3000295

Click here to add a new row

**Contact Information**

Address 1  Zip  Phone 0-  Edit

Address 2  Country  US  Mobile  No alternate

City  Preferred contact method  Email  Edit

State  Preferred delivery method

County  Marketing messages  Permitted  Prohibited  Do not send reminders

**Patient Origin**

Preferred language  Education level  Religion  Ethnicity  Race  Sexual orientation  Gender identity

**Family History**

| Relationship | Family History | Age At Diagnosis | Age At Death |
|--------------|----------------|------------------|--------------|
| b            |                |                  |              |

5. Add all the patient General Information and Contact Information

1. Required Fields:

1. First and Last name (legal name)
2. Sex
3. DOB

2. Additional Fields:

1. Address with city, state, and zip code
2. Phone number
3. Email
4. Preferred Contact method
5. Middle Initial (if applicable)

Patient Patient Notes Attachments

**General Information**

Prefix  First \*Ariel Sex \*Female Last \*Test DOB \*07-08-1960 57y 7m

Middle N Suffix  Birth place  Father's name

Disable Patient Portal  Deceased

Issuer  MRN  Active

system T3000012

Click here to add a new row

**Contact Information**

Address 1 15601 Dallas Parkway Zip 75001 Phone (214) 111-1111 11111 Edit

Address 2 Suite 500 Country US  Mobile  No alternate

City Addison Preferred contact method Cell Phone Email ariel.young@solismammo.com Edit

State Texas Preferred delivery method Cell Phone

County Dallas (Texas) Marketing messages  Permitted  Prohibited  Do not send reminders

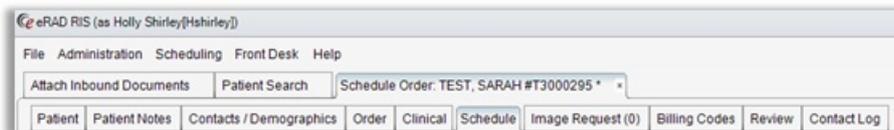
**Patient Origin**

Preferred language English Education level  Religion  Ethnicity  Race  Sexual orientation  Gender identity

**Family History**

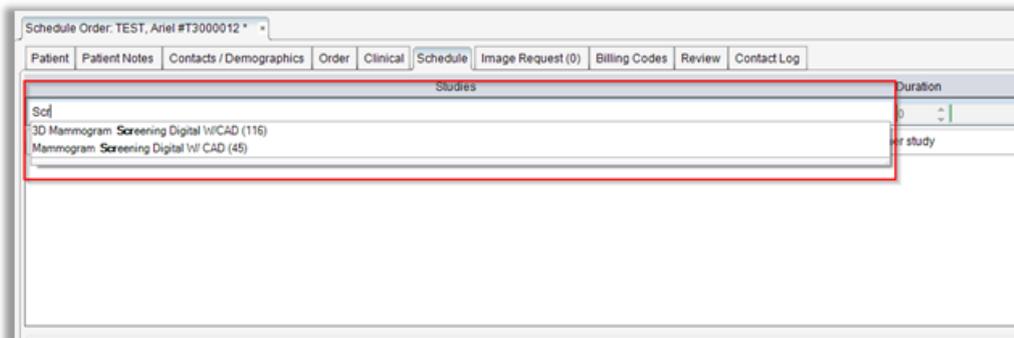
| Relationship | Family History | Age At Diagnosis | Age At Death |
|--------------|----------------|------------------|--------------|
| b            |                |                  |              |

6. Click on "Schedule" Tab



7. On the Scheduling Tab,

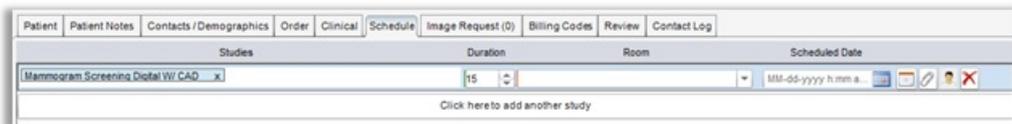
1. Search for the exam you are needing to schedule by typing the exam.
2. The search tool will begin to narrow down the list of exams.
3. Click on the appropriate exam type (with mouse click or by hitting enter)



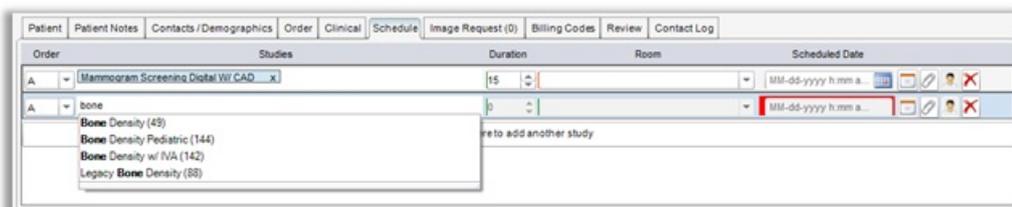
8. When Exam Type requires Laterality, IMMEDIATELY select from the drop-down list (middle of page)



9. To add another exam, select "Click here to add another study"



10. Search for the additional exam



11. Note: The order in which you select the exam MATTERS. Be sure to put them in the order that they should be scheduled according to the scheduling rules. Ex: Diagnostic Mammograms are ALWAYS followed by a Breast Ultrasound

1. Top exam: Will be the first appointment
2. Additional exams: Will follow in order listed
3. To change order, delete and search again

| Order | Studies                              | Duration |
|-------|--------------------------------------|----------|
| A     | Mammogram Screening Digital W/ CAD x | 15       |
| A     | Bone Density x                       | 30       |

| Order | Studies                              | Duration |
|-------|--------------------------------------|----------|
| A     | Bone Density x                       | 30       |
| A     | Mammogram Screening Digital W/ CAD x | 15       |

12. 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 patient preferences. (Not required to use all search options)
    1. Check or uncheck days of the week
    2. Enter Earliest and Latest time range
    3. Enter date range to search
  5. Choose the Search Range according to the patient's preferences
  6. Click "Search"

**Search Options**

Region  
Solis Mammography

Practice  Site group

Solis Mammography

Site  
Solis Mammography Southlake

Minutes between studies  
Min 0 Max 0

Day and time options

|   |          |
|---|----------|
| <input checked="" type="checkbox"/> Monday    | Monday   |
| <input type="checkbox"/> Tuesday              | Earliest |
| <input checked="" type="checkbox"/> Wednesday | 10:00 AM |
| <input type="checkbox"/> Thursday             | Latest   |
| <input checked="" type="checkbox"/> Friday    | 4:00 PM  |
| <input type="checkbox"/> Saturday             |          |
| <input type="checkbox"/> Sunday               |          |

Search Range

Start Date 03-23-2018

End Date 03-27-2018

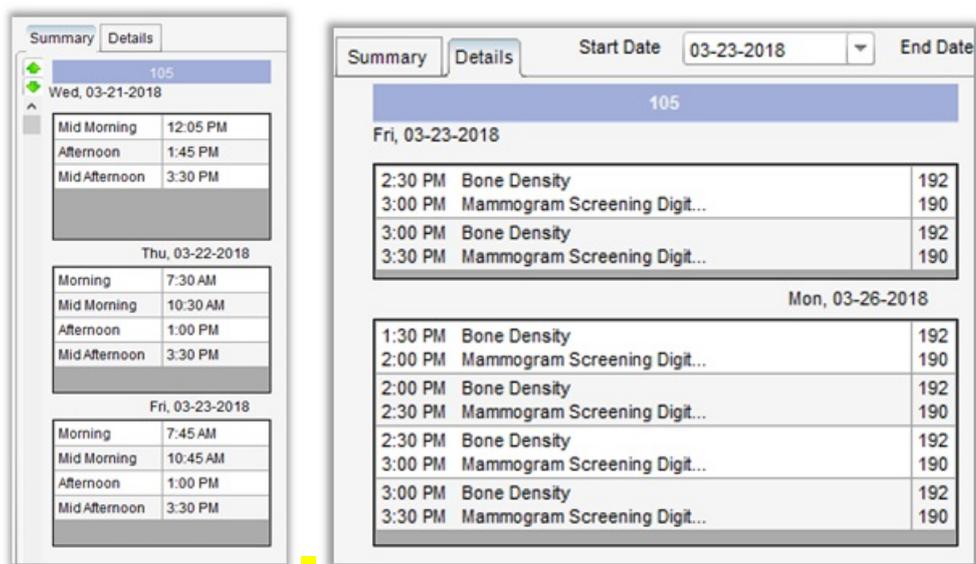
13. Two Search Functions are available:
1. Summary Tab - Shows the earliest available match in the morning, mid-morning, afternoon, and mid-afternoon
    1. Note: Hover over the time to see a break out of the exams and order

30min on Friday, March 23, 2018 2:30 PM on DFW-Southlake BD(192)  
 15min on Friday, March 23, 2018 3:00 PM on DFW-Southlake MG 1(190)

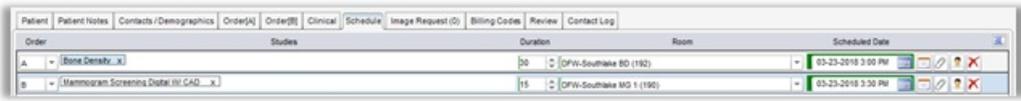
2. Details Tab - Shows every match available

NOTE: Match times are for ALL exams selected and in the order requested!

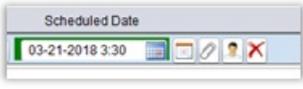
**DO NOT SCHEDULE IN YELLOW SLOTS! THESE ARE BLOCKED AND NOT TO BE USED!**



14. 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)



15. To delete an appointment, select the red X



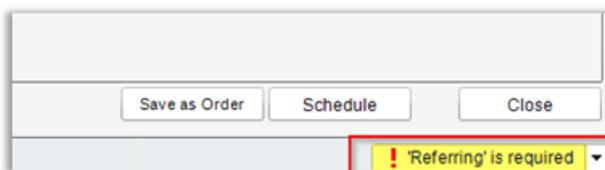
16. Click on the "Order Tab". Add the detailed order information.
1. **Reason for Order** - If already listed, DO NOT UPDATED! If this field is blank, select from the Auto-text options listed. Then copy and paste into Order Notes.
  2. **Referring Physician Details** - Search for the referring physician 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

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



18. 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.



19. 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:

Patient reports their weight to be lbs.  
**HOLLY TEST** is scheduled for a  
**Bone Density on Friday March 23, 2018 at 3:00 PM for 30 minutes at Solis Mammography Southlake**  
 - (77080) Bone Density without IVA

**Mammogram Screening Digital W/ CAD on Friday March 23, 2018 at 3:30 PM for 15 minutes at Solis Mammography Southlake**  
 - (G0202) MAMMOGRAM SCREEN DIGITAL

**Address:**

**Solis Mammography Southlake**  
 1545 E. Southlake Blvd.  
 Suite 200  
 Southlake TX 76092

**Prep Instructions:**  Prep Instructions Reviewed

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

1 of 2 Bone Density w/ IVA  
 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  
 2 of 2 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

20. Once the prep instructions have been provided to the patient, check the “Prep instructions reviewed”

Prep Instructions Reviewed

21. Then select “Schedule” – **AT THIS POINT ALL EXAMS HAVE BEEN SCHEDULED**

Schedule

EDITED: 04/02/2021