Scheduling New Patient - New Exam - Multiple Exams

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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

Search Chiena			_										
Eirst Name: Sa	ara		a	Birth Date	MM-	dd-yyyy		10					
Last Name: te:	est			Phone #:									
	Search Oth	er Variations		Zip Code:									
MRN:]		S	earch	Reset			New Patier	nt / New Appointment	•	
First Name La	.ast Name	Middle Name	Birth Daf	e MRN	Issuer	Gender	Address	City	State	Zip Code	Matching Alternate MRN	Matching Alt	ernate MRN Issuer

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



4. The "Patient Tab" will open

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ttach Inbour	ind Documen	s Patien	t Search	Schedul	e Order: TE	ST, sara #T	3000295 ×					
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General Info	ormation											
Prefix									Issuer	MRN		Active
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Middle		Suffix	-	Birth	place							
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- 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)

Desta line		-						Issue	er	MRN	Ac	tive
Prefix First Last Middle Disable I Decease	Ariel Test N Patient Port	Suffix	•	Birth place Father's name	Sex DOB	Female *	y 7m	sysh C	om Click here to an	T3000012 dd a new row	, .	
Contact Info	rmation						Т	_				
Address 1	15601	Dallas Parkway		Zip	75001		P	hone	(214) 111-111	1 11111		Edi
Address 2	Suite 5	00		Country	US				Mobile	No a	ternate	
City	Addiso	n		Preferred contac	t method	Cell Phone	- E	mail	ariel.young@	solismammo.com		Edi
State	Texas		-	Preferred deliver	y method							
County	Dallas	(Texas)	-	Marketing messa	iges 💿	Cell Phone Email			Do not s	end reminders		
Patient Orig	in			Family History		Home Phone						
Preferred	language	English		Relationship	Family Histo	Mail Work Phone			Ag	e At Diagnosis	Age At I	Dea
Education	level		-	D		Declined						
Religion			-				_					
Ethnicity		[1									
Race			1									
Sexual or	entation		-									

6. Click on "Schedule" Tab

CeeRAD RIS (as Holly Shirley[Hshi	rley])	
File Administration Schedulin	ng Front Desk Help	
Attach Inbound Documents	Patient Search Schedule Order: TEST, SARAH #T3000295 * *	
Patient Patient Notes Cor	tacts / Demographics Order Clinical Schedule Image Request (0) Billing Codes Review Contact I	.og

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)

I.	Schedule Order: TEST, Ariel #T3000012 * *	
l	Patient Patient Notes Contacts / Demographics Order Clinical Schedule Image Request (0) Billing Codes Review Contact Log	
L	Studies	Duration
I	sa	0 0
L	3D Marmogram Soreening Digital WICAD (116)	r study
I	Mammogram Screening Digital W/ CAD (45)	,
L		
L		
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U		

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"

Patient	Patient Notes	Contacts / Demographics	Order	Clinical	Schedule	Image Request (I	0) Billing	Codes	Review	Contact Log		
		Studies				Duration			Room	1	Scheduled Date	
Mammoo	aram Screening D	iqtal W/ CAD x				15					▼ MM-dd-yyyy h.mm a	 8 X
						Click hereto a	add anothe	r study				

10. Search for the additional exam

Patient	Patient Notes Contacts / Demographics Order Clinical Schedule	Image Request (0) Billing Code	s Review Contact Log		
Order	Studies	Duration	Room	Scheduled Date	
A "	Mammogram Screening Digital W/ CAD x	15 0		💌 🛛 MM-dd-yyyy h.mm a 🎫 🔽 🖉 🤶	×
A	bone	¢ ¢		💌 Mil-dd-yyyy h.mm a 💽 🖉 🤶	×
	Bone Density (49) Bone Density Pediatric (144)	re to add another stud	Υ		
	Bone Density w/ IVA (142)				
	Legacy Bone Density (88)				

- 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

	tient Patient Notes C	ontacts / Demographics Order Clinical S	chedule Image Request (0) B
0	rder	Studies	Duration
A	Mammoqram Scre	ening Digital W/ CAD x	15 🚖
A	Bone Density x		30 🚖

Patient	Patient Notes	Contacts / Demographics	Order	Clinical	Image Request (0)	В
Order		Stuc	lies		Duratio	n
A	Bone Density	x			30	÷
A	Mammogram S	Creening 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"
- 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

l	30min on Friday,	March 23,	2018 2	2:30 PM	on	DFW-Southlake BD(192)
l	15min on Friday,	March 23,	2018 3	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!

Search Options	
Region	
Solis Mammography	
Practice	Site group
Solis Mammography	-
Site	
Solis Mammography	Southlake 🔻
Minutes between st	udies
Min 0 🚔 N	lax 0 🚖
Day and time option	ns
Monday	Monday
Wednesday	Earliest
Thursday	10:00 AM
Friday Saturday	Latest
Sunday	4:00 PM
Search Range	
Start Date 03-2	3-2018 🔻
End Date 03-2	7-2018 💌
4 Sear	ch 🔶

Afternoon Mid Aftern	ng 12:05					105	
Mid Aftern		PM	Fri, 0	3-23-2018			
MIG Attern	000 2-20 P	M	0.00	D11 D	Dessite		400
	0011 3.30 P	na la	2:30	PM Bone	Density	ine Diat	194
			3.00	PM Mamn	nogram Screen	ing Digit	190
	Thu 03-22	-2018	3:00	PM Bone	Density	ine Dieli	19.
Morning	7-20 4	1	5.50	PM Mamn	nogram Screen	ing Digit	19
Mid Morni	10:30	AM				Mon, 03-	26-2018
Afternoon	1:00 P	M	4.20	DM Reas	Dessity		40
Mid Aftern	oon 3:30 P	M	1:30	PM Done	Density	ing Digit	19
			2.00	PM Marin	Dereit	ing Digit	190
	Fri. 03-23	-2018	2:00	PM Bone	Density	ing Digit	19.
Morning	7:45 A	M N	2.30	PM Mallin	Descible	ing Digit	150
Mid Morni	ng 10:45	AM	2:30	PM Bone	Density	ing Digit	19
Afternoon	1:00 P	M	5.00	PM Marin	Dessite	ing Digit	19
Mid Aftern	oon 3:30 P	M	3:00	PM Bone	Density	ine Diak	19
			5.50	Fin marini	logram Screen	ing olgi	15
ummary Detai	IIS First ava	Morning	PH 11.25 AM	Other availa	ble rooms	First day in range	
lomino			1.00.04	Afternoon	1:00 PM	· · · · ·	
forning Afternoon	1:00 PM	Afternoon	1.00 PM				

- 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)

Patient Patient Notes Contacts /D	emographics Order[A] Order[B] Clinical Schedule Image Re	quest (0) Billing Codes Review Contact Log			
Order	Studies	Duration	Room	Scheduled Date	a.
A - Bone Density x		30 C/W-Southlake B	0 (192)	- 03-23-2018 3:00 PM 📰 🗇 🧷	2 X
8 - Menmoaren Screening Diat	with CAD x	15 CPW-Southieke M	IG 1 (190)	- 05-23-2016 3:30 PM 📷 🗔 🧷	2 X

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.
 - 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

Schedule Order * x					
Patient Patient Notes Contacts / Dem	ographics Order Clinical Schedule Image Request (0) Billing Codes Review Contact Log				
Reason for order 04-01-2021 Stephanie.Williams - 📝	Referring Details CC Physicians Referring ! Visited at * Img notes Ref. date MM-dd-yyyy III Ord. dept.				
Preferred Location Practice* Mammography-Eastern Site	Flags Direct referral Transportation required STAT exam Special accommodations STAT read Transition of care STAT PreCert Urgency Level *				
Insurance Policies	Billing Method				
Note Carrier Co Carrier Name	Policy # Group Number Group Name Phone Priôrity Eligi (Bill to insurance) (Gill to insurance) (Hill to insurance)				
Manage Policies IVT Notes	Verification not required Insurance verified Amount to collect *				
Order Notes 04-01-2021 Stephanie.Williams -	Scheduling Notes 04-01-2021 Stephanie.Williams -				

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

		1.
Schedule	Modify	
	· · · · ·	

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 libs. HOLLY TEST is scheduled for a Bone Density on Friday March 23, 2018 at 3:00 F - (77080) Bone Density without IVA	M for 30 minutes at Solis Mammography Southlake
Mammogram Screening Digital W/ CAD on Friday - (G0202) MAMMOGRAM SCREEN DIGITAL	March 23, 2018 at 3:30 PM for 15 minutes at Solis Mammography Southlake
Address:	
Solis Mammography Southlake 1545 E. Southlake Bivd. 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 bre

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



21. Then select "Schedule" - AT THIS POINT ALL EXAMS HAVE BEEN SCHEDULED

Schedule

EDITED: 04/02/2021