

Adding a Referring Provider to an Exam in eRAD

Last Modified on 06/10/2025 6:05 pm EDT



Adding a Referring Provider to an Exam in eRAD

Purpose: This job aid provides step-by-step instructions for Contact Center agents to add or update referring physician information in a patient's exam within eRAD.

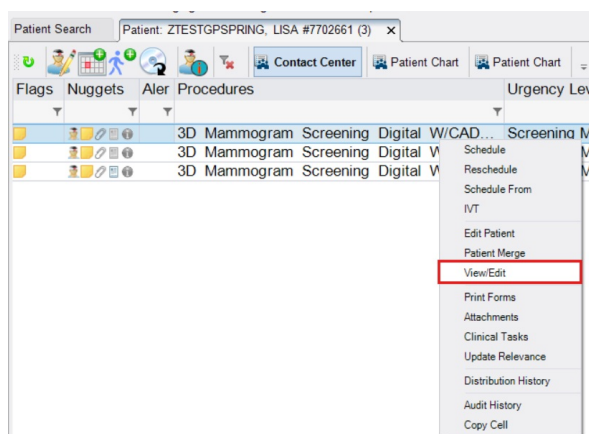
Step 1: Open the Patient Folder

- Use the **search function** in eRAD to locate and open the correct **Patient Folder**.

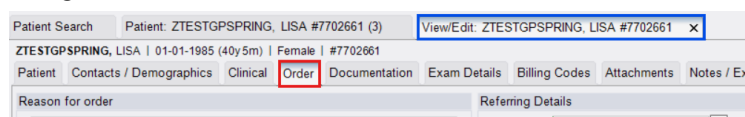
Step 2: Open the Exam / Access the Order Tab

1. From the Patient Folder

a. From a Scheduled Exam:



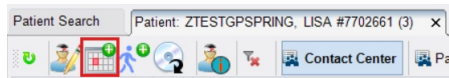
- Select the **accession** that needs to be **updated**
- Right-click** and select **View/Edit**
- The **View/Edit** tab will open
 - Navigate to the **Order** tab



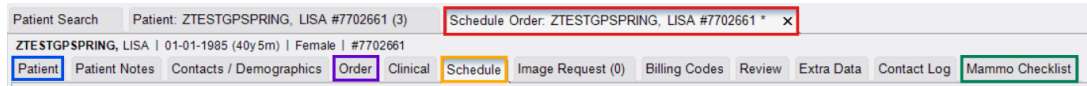
- Continue to Step 3 below**

b. While Scheduling (New Appointment or Ordered Accession)

- i. **Double-click** on the ordered accession **OR** click the **New Appointment** button from the **toolbar**



- ii. **Complete** required workflows for the **Patient tab**, **Schedule tab**, **Exam Questionnaire** (if applicable), and **Order tab**



- iii. **Continue to Step 3 below**

Step 3: Add or Update the Referring Physician

- **To Select a Past Referring Physician** (if available)
 - Use the **dropdown** in the **Referring** field to select from the **patient's previously used providers**.

- **To Add a New Referring Physician**
 - Start typing the **providers name** in the **Referring** field.
 - Press **Enter** or click on the **magnifying glass** to search.

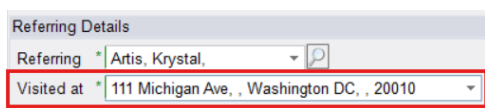
- **Review** the list of **results**

Last Name	First Name	Middle Name	Summary	Primary Office	Additional Office	Refer
TEST	DOCTOR	KEEP ACTIVE ERAD T	User ID: testdoc DOCTOR KEEP ACTIVE Male pam.bergendahl@deephi Internal ID: 1436 NPI: 12345678	Report Delivery: Fax 11234 FAKE ST Fort Worth, Texas 761 Fax: (817) 123-3333 Phone: (817) 123-4567		

- Once the **correct provider** has been located, **double-click** to select.
- If the **referring provider** is not in the results, try using **other search criteria** (e.g., phone number, NPI, etc.)
- If you are **still unable to locate the provider**, use **"UPDATE REQUIRED PHYSICIAN"** as the placeholder and leave **detailed notes** regarding the situation under **Order Notes**.

Step 4: Assign the Visited At Location

- If the provider only has **one location**, the address will populate automatically in the "**Visited At**" field

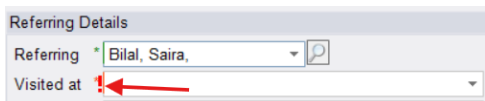


Referring Details

Referring * Artis, Krystal, [search icon]

Visited at * 111 Michigan Ave, , Washington DC, , 20010

- If the physician has **multiple locations**, a red exclamation mark will appear:

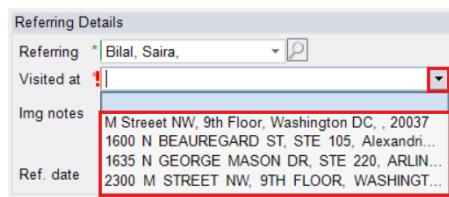


Referring Details

Referring * Bilal, Saira, [search icon]

Visited at ! [dropdown arrow]

- Select the correct location from the dropdown by **confirming** with the **patient or caller**.



Referring Details

Referring * Bilal, Saira, [search icon]

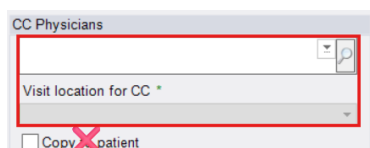
Visited at ! [dropdown arrow]

Img notes

Ref. date

- M Street NW, 9th Floor, Washington DC, , 20037
- 1600 N BEAUREGARD ST, STE 105, Alexandri...
- 1635 N GEORGE MASON DR, STE 220, ARLIN...
- 2300 M STREET NW, 9TH FLOOR, WASHINGT...

Step 5: Add Additional (CC) Providers



CC Physicians

[search icon]

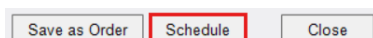
Visit location for CC *

☐ Copy ~~X~~ patient

- Search for additional CC providers the same way you added the primary referring provider.
- Select the provider and choose the correct Visited at location.
- Repeat as needed to add all CC providers.
- **Do NOT check the "Copy to patient" box**

Step 6: Save Changes

- **From a Scheduled Exam:**



Save as Order Schedule Close

- Click **[Save]** from the bottom right corner

- **While Scheduling (New Appointment or Ordered Accession)**



Schedule Modify

- Changes will be saved when the exam is scheduled by clicking the **[Schedule]** button on the **Schedule Summary** (confirmation) window.