To add a patient:

1. From the Scheduling menu, click Add Patient to create the patient record only. The Patient Record screen displays.


ⓒ Note that fields with a red asterisk or exclamation point **!** are required. If required information is not entered, the record cannot be saved. Data errors are numbered and captured in the lower right corner of every page; use the drop-down list to display those errors.

2. Before entering a new patient, search for possible duplicates.

To add an outside read:

Outside reads are images performed at an outside facility for which eRAD RIS users are contracted to perform the professional interpretation only. These images can be digital or analog. This can also be used to document prior films done at another facility.

1. From the Scheduling menu, click the Add Outside Read item.

2. Before entering a new patient, search for possible duplicates.

3. Complete the required information.

4. Use the free-form Patient Notes field to add any additional demographic or relevant biographical data for the patient.

5. Click the Order tab.

6. In the Studies field, start typing the procedure name and select the procedure from the ensuing list.

7. Enter the date the exam was performed in the Exam Date field; you can use the calendar button to select the date.

8. In the Ext Accession field, enter the external accession number if the images will not be imported into eRAD PACS. It can also be edited on the Documentation tab.

9. In the Modality Type drop-down list, select the modality type. This field is required.

10. Enter the patient's specified history into the History field.

11. Click the Attachments button to add the outside document (electronic file, hard copy or verbal order) into the system.

12. To designate the document type before proceeding, click the Advanced button and make a selection from the Document Type drop-down list.
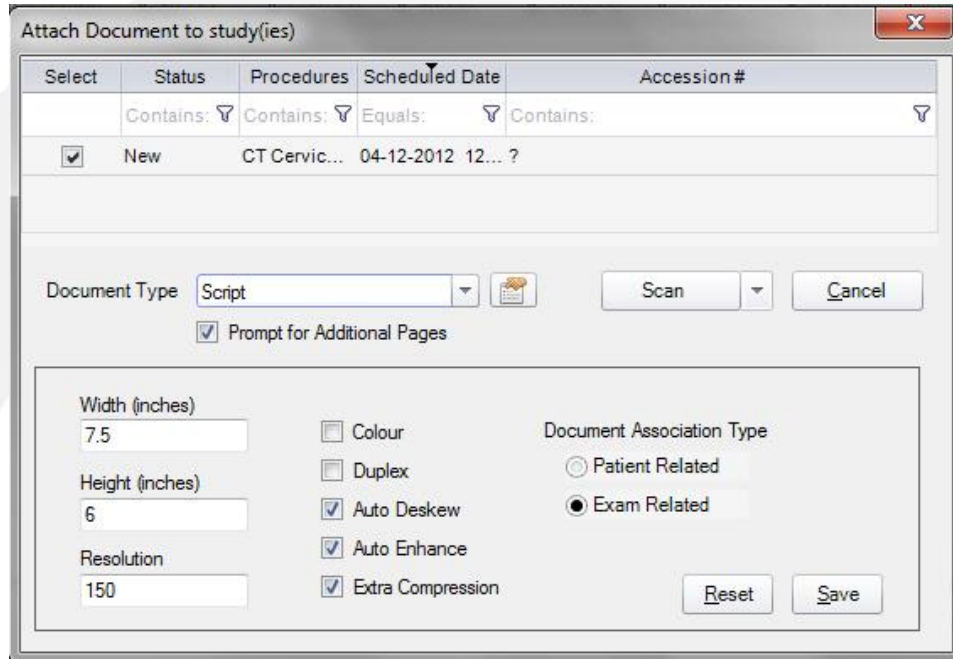
15. Click the down arrow next to the Attachments button to assign a specific radiologist to this study.
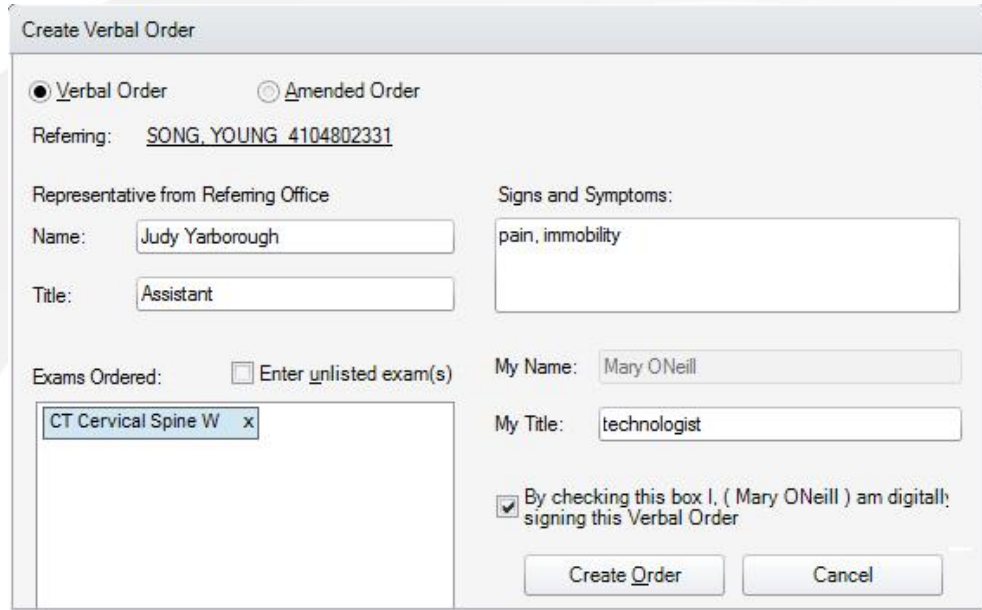
    e Note that an ordering physician may have specified a preferred radiologist. eRAD RIS can capture a preferred radiologist for all exams, for certain modalities or for certain procedures. If that information has been specified (entered), then the Assigned Radiologist field auto-populates according to the ordering physician's preference. If the ordering physician has designated more than one preferred radiologist, then the drop-down list presents with those preferences (prefixed by "Preferred") at the top of the list for selection.

16. Use the down arrow next to the Scan button to choose the appropriate function of that button:

    Scan -- Adds a physical document and opens a dialog box to control the device.
    Import -- Adds an electronic file and opens a browse dialog to find the file.
    Verbal -- Opens a dialog box for entering the order information, specifically the name of the referring physician's representative, the exams on the order and the acknowledgement by the user that the information has been captured.

Create Verbal Order

17. Click the Close button after the document has been added.

18. In the Referring field, which is required, enter any part of the physician's name and click the search button [🔍] to populate the field. If the referring physician's name does not appear in the search results, click the Add Unknown button to add a record for that physician.

19. Click the Visited At drop-down list to select the location where the patient was seen by the referring physician.

20. In the Order Notes field, enter any free-form text that relates to this procedure only.

21. In the CC Physicians field, use the search feature to find the physician(s) who will be cc'd on this procedure, or (for existing patients) click the drop-down arrow to select a physician previously associated with this patient. More than one physician can be cc'd on the order; to remove a physician from this field, click the X next to the physician's name in the field.

22. From the Performed Location drop-down lists, select the practice and site where the exam was performed.

23. If the patient has an MRN in the external system, add it to the External MRN field.
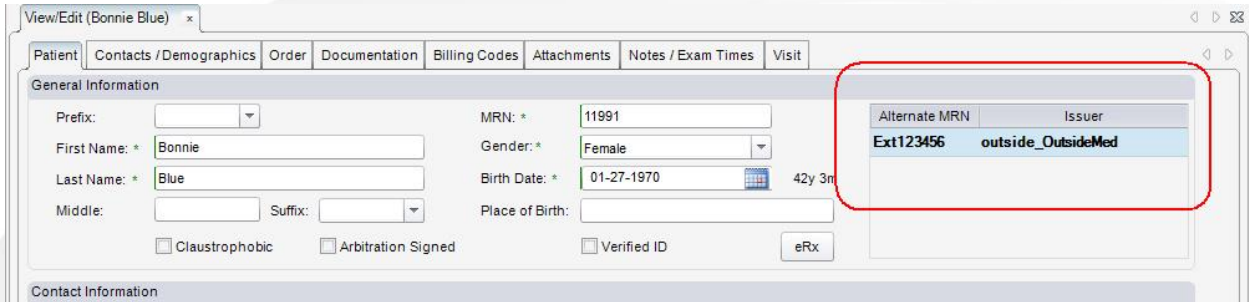
e Note that the alternate MRN will display, but not in bold, when creating a *new* order. If the MRN is bold, that indicates that the open study is an outside read, and its corresponding report is associated with that external MRN.

24. Check the STAT Read box if the order must be read immediately; check the STAT Precert box if the order must go through the pre-certification process immediately. Check the Digital box if one or more of the images are expected to be in eRad PACS. This setting puts the order into the PACS correction workflow; when the radiologist reads the study, the images will load.

25. Click the Manage Policies button to enter the patient's insurance information.

26. Carriers for existing patients will display in the top pane; to add a new carrier, or a carrier for a new patient, click the Add button ❄ and enter the policy information (policy number, group number, etc.) across the row.

27. Check the Use box in the carrier's row to apply that policy to the visit.
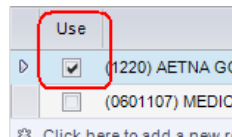
28. The Expired Policies checkbox will activate if the patient's previous policies were known to the system; check this box to view expired policies.

29. Policy Holder information displays in the left pane. From the drop-down list, select the policy holder's relation to the patient. If that person exists in the system, certain contact fields auto-populate. Otherwise, enter the contact information for the policy holder.
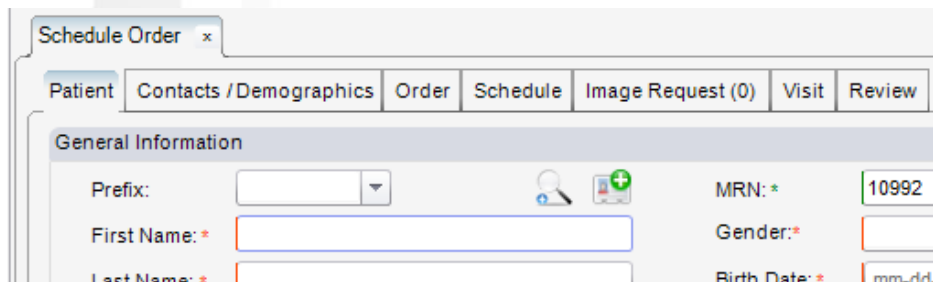
(*e* Note that all data from the patient tab is pulled over to these fields if Self is selected. The Last name and Address fields auto-populate if Spouse or Child is selected. Fields must be completed for all other selections.

30. Injury Details display in the right pane. If the complaint is due to an injury, enter the claim number (or check the Unknown Claim Number box), the date of the injury, the injury's source and location, and the adjuster's contact data.

31. When complete, click the OK button to save the data or click the Cancel button to exit the dialog without saving. You are returned to the Order page.

    (*e* Note that, depending on the policy selected, the Insurance Verification checkbox may activate. Check this box after the insurance has been verified. This action is auditable.

32. Click the Save button to save the outside read to the system, or select the Close button to return a prompt for saving or exiting without saving.

To schedule a new appointment:

Patient Information

1. From the Scheduling menu, click New Appointment.

2. Search for the patient to schedule by entering any part of the patient's first or last name, or by entering the patient's exact birth date, into the appropriate field(s).

3. To search for names with a similar sound or spelling, click the Search Other Variations checkbox. Variations are displayed in red in the results list.

4. Click the search button   to check whether the patient already exists in the system. A list of possible matches is returned. If an exact match is found, as it may be if you entered a birth date, the page is auto-populated with the matching information.

    Note that you can quickly reverse the placement of the name values, if they were entered incorrectly. Click the reverse button   to switch the position of the last name and first name values. The results list automatically updates.

5. If the patient is included in the list, double-click that patient's name, or select the patient and click the Select button at the lower right of the page.

    If the patient does not appear in the list, click the New Patient button to add the patient to the system. Then proceed with the steps outlined below.
    Note that if the patient exists in the system and has orders, or short-term follow-up orders, the system will prompt the user with the Existing Orders window, so that duplicates are avoided. At this prompt, the user must make a selection: existing order(s) from the list or the checkbox at the bottom of the prompt (which proceeds with the new order). If the checkbox is cleared, one or more orders must be selected from the list. Select the OK button to exit the prompt.
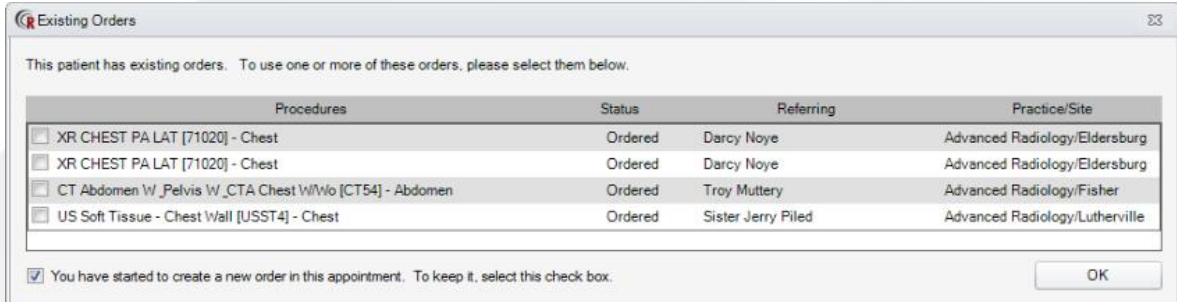
6. Check the Claustrophobic checkbox if this patient has that issue; this ensures that appropriate equipment is made available for the patient's procedure.

Contact Information

1. Click the Contacts / Demographics tab to enter emergency and other contact information.

2. From the Relation drop-down list in the Responsible Party section, select the relationship between the responsible party and the patient; then enter the address and phone information for that party in the remaining fields.

3. From the Emergency Contact drop-down list (in the section to the right), select the patient's emergency contact; then enter the address and phone information for that party in the remaining fields.

4. To manage outside access to the patient's medical records, click the Add button and enter contact information for each party allowed to access the patient's medical records.
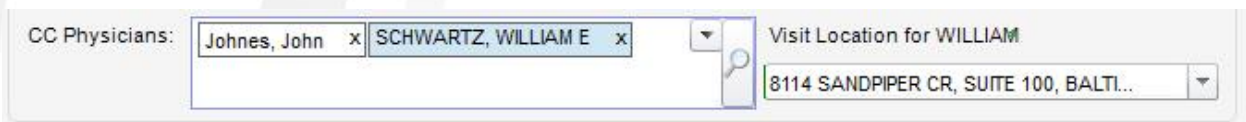
   Ce **Note** that you must scan the signed release form for medical record access and attach it to the patient's record.

5. To view individuals whose access has expired, click the Previous button.

Order Information

1. Click the Order tab to enter information on physicians, priority and insurance.

2. In the Referring field, which is required, enter any part of the physician's name and click the search button [🔍] to populate the field.

3. For existing patients, click the drop-down arrow to select a physician previously associated with this patient.

4. To view referring notes, click one of the two associated icons. Click the Specialty Read icon to open associated notes for the referrer. Click the Protocol Notes icon to open protocol notes. A pop-up window displays the selection.

5. Click the Visited At drop-down list to select the location where the patient was seen by the referring physician.

6. In the Chief Complaint field, enter free-form notes to describe the patient's condition. This field is required.

7. In the CC Physicians field, use the search feature to find the physician(s) who will be cc'd on this procedure, or (for existing patients) click the drop-down arrow to select a physician previously associated with this patient.

If the cc physician's name is not yet known (i.e., does not yet exist in the system), click the Search button and then click the Add Unknown button to add a record for that physician.

8. From the Preferred Location drop-down lists, select the practice and site preferred by the patient. This field is required when saving an order.

    Note that the External MRN field will appear if this is an outside read. Enter or edit the MRN from the external system in this field.

9. Check the STAT Exam box if the procedure is a high priority; this designation affects scheduling.

10. Check the STAT Read box if the order must be read immediately.

11. Check the STAT Precert box if the order must go through the pre-certification process immediately.

12. Check the Transportation Required box, and fill in the subsequently enabled field, if the patient requires transportation.

13. Check the Special Accommodations box if the patient requires an accommodation.

14. From the Class drop-down list, select whether the patient is categorized as outpatient, emergency, etc., by selecting a value.

15. Sedation -- Select the type of sedation necessary for the patient.

16. If the patient will self-pay, select a Billing Method from the drop-down list. Enter any pertinent information in the corresponding text box and skip to step #23. (The Manage Policies section is disabled.)

OR

16. If the patient will be billed to insurance, click the Manage Policies button to enter the patient's insurance information. (The Billing Method list box is disabled.)

17. If the Manage Policies button was selected, carriers for existing patients will display in the top pane; to add a new carrier, or a carrier for a new patient, click the Add button ✿ and enter the policy information (policy number, group number, etc.) across the row.

18. Check the Use box in the carrier's row to apply that policy to the visit.
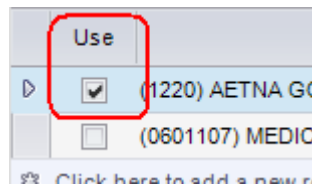
19. To view or add IVT notes for the patient (for this appointment as well as for any other scheduled appointments which are being designated as arrived that day), click the IVT Notes button. This button is visible only to privileged users and only when IVT notes exist. These IVT notes appear (as read-only) in the Exam screen when the technologist is performing the exam.

20. The Expired Policies checkbox will activate only if the patient's previous policies were known to the system; check this box to view expired policies.

21. Enter the contact information for the policy holder.

22. Injury Details display in the right pane. If the complaint is due to an injury, enter the claim number (or check the Unknown Claim Number box), the date of the injury, the injury's source and location, and the adjuster's contact data.

23. When complete, click the OK button to save the data or click the Cancel button to exit the dialog without saving. You are returned to the Order page.

    ⓔNote that, depending on the policy selected, a protocol memo from the carrier may pop up. Review this protocol and select the Close button.
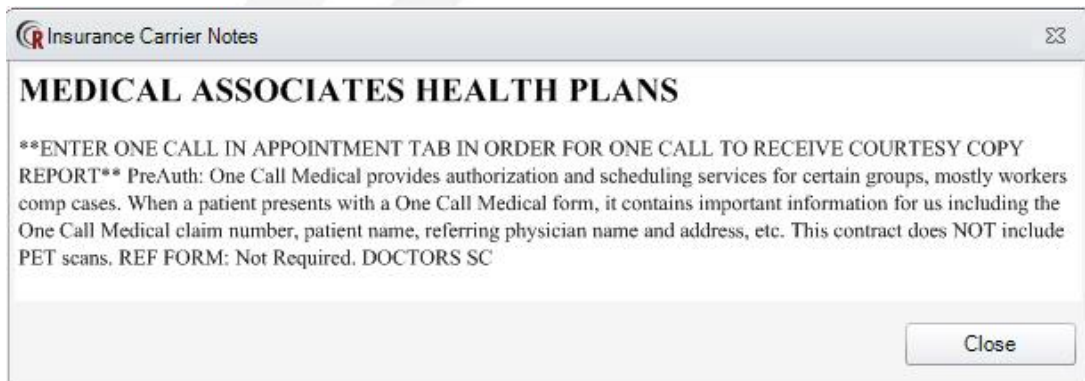
    ⓔNote that, depending on the policy selected, the Insurance Verification checkbox may activate. Check this box after the insurance has been verified.

24. In the Order Notes field, enter any free-form text that relates to this procedure only.

Schedule

1. Click the Schedule tab to specify and schedule the procedure. Click the show/hide button 🔲 on the far right of the header to show the calendar pane if it isn't already displayed.

2. In the Studies field, start typing the procedure name; eRAD RIS immediately supplies a list of possible matches for that procedure. Select the procedure from the ensuing list.

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3. If a laterality modifier (e.g., left side for a wrist arthrogram) is required, the Laterality drop-down list below the procedure rows will enable; select the correct designation (right or left) for that body part.
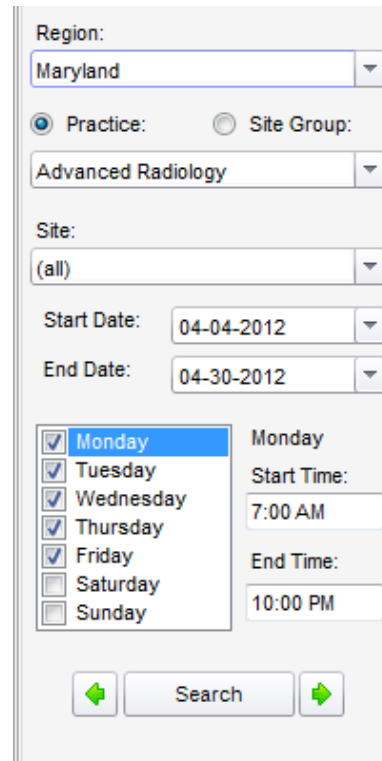
   Note that you can remove the row by clicking the delete button. ✗ Remove only the procedure by clicking the black X next to it.

4. From the Room drop-down list, select a room for the patient's appointment. Only rooms appropriate to the corresponding procedure, patient's weight and patient's fears (i.e., claustrophobia) are made available.

5. To add a second procedure for the patient's visit, click the bar titled "Click here to add another study." Repeat steps 2-5 to add the procedure. The available time slots will reflect the time required to perform all entered procedures.

6. Enter criteria in the calendar (right) pane to search for an available time slot that matches this duration and room choice. Using the drop-down lists, select a practice or site group to narrow down the location best suited to the patient. Also use the drop-down lists to define a date range for scheduling the appointment. Clear the checkboxes next to the days to eliminate from consideration. Enter the start time and end time to define the time range (of each day) to search.

   Note that only those sites and practices assigned to the user's schedule group are made available.

7. Click the Search button. An appointment book, with only the specified dates, opens in the bottom pane. It shows the room with the first available time slot (that matches the criteria) in the first

column; rooms available for subsequent slots are displayed, in order of availability, left to right. If more than one room meet the criteria and are available, they display alphabetically, left to right.

Each day of the date range is a row in the appointment pane. (Scroll down to see more days.) The first available time slots (morning and afternoon) are displayed in each cell.

Note that you can jump to the start of the previous day or the next day by using the green arrows.

9. To choose a specific time for the appointment, click the Details tab. The appointment book shows all available slots for the procedure(s). If multiple modalities are to be schedule in one visit, the Details view shows the available rooms that correspond to the procedures.

10. Click a displayed slot to schedule the appointment for that day and time.

@ Note that you can skip steps 7-9 by using the calendar button 🗓 to select a date and time. Available rooms, based on the user's schedule group are likewise available for selection. You can also skip steps 7-9 by opening the Appointment book from the Scheduling menu and manually entering an appointment. A legend displays to indicate the colors that correspond to any scheduling restrictions displayed on the calendar, as well as the current status of existing appointments.
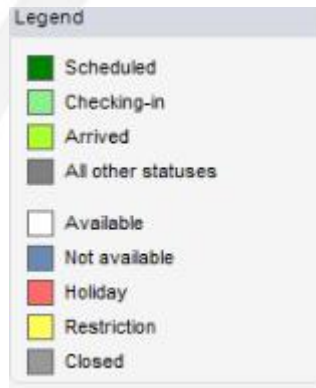
11. Click the Schedule button to schedule the appointment. To save the data as an order (without yet selecting an appointment time), click the Save as Order button; the order is routed to the Orders to Schedule Worklist.

12. Enter the missing data if applicable.

13. When the record is complete, eRAD RIS returns a review page with prep instructions. Click the Prep Instructions Reviewed checkbox to record the prepr review

14. To change any aspect of the appointment, click the Modify button to return to the record. To schedule the appointment, click the Schedule button.

To confirm a scheduled appointment:

1. From the scheduling menu, click Confirmation Worklist.

    ℮ Note that you can filter the worklist to narrow the results.

2. To change the displayed appointments, use the icons just above the worklist:

    ◆ Display appointments for the previous day.

   ➡ Display appointment for the next day.

    ↻ Refresh the list of displayed appointments.

    📅 Open a calendar to select a day of appointments to display.

    Flags to the left of each row indicate necessary information about the appointment at-a-glance.

3. To manage an appointment, click it and select the Confirmation button, or double-click the row.

4. If the appointment includes multiple studies, a prompt will ask whether to process all procedures for the patient. To separate the confirmation for one procedure from another, clear the checkbox for the procedure to leave out of this confirmation process. Click the OK button to proceed or the Cancel button to abort the confirmation.
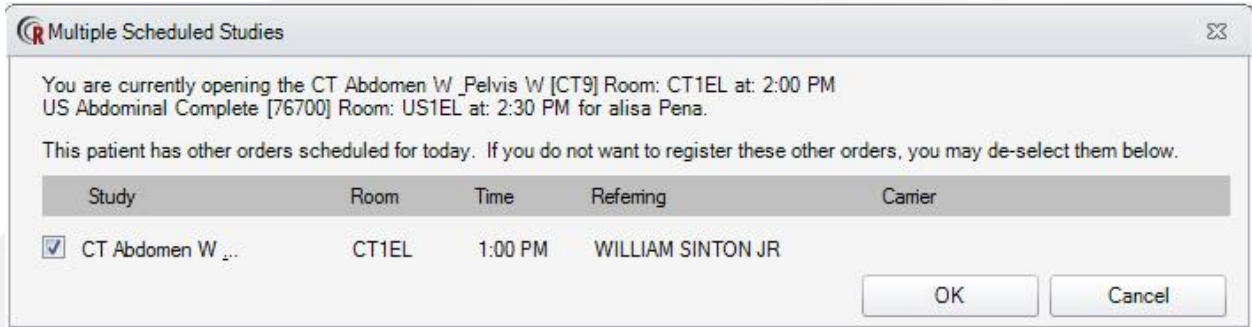
To reschedule a patient:

1. Search for the appointment by patient

2. Click the Reschedule button.

3. A prompt confirms which appointment and procedure to reschedule and requests a reason for the change. The OK button will not activate until a reason is selected from the drop-down list.
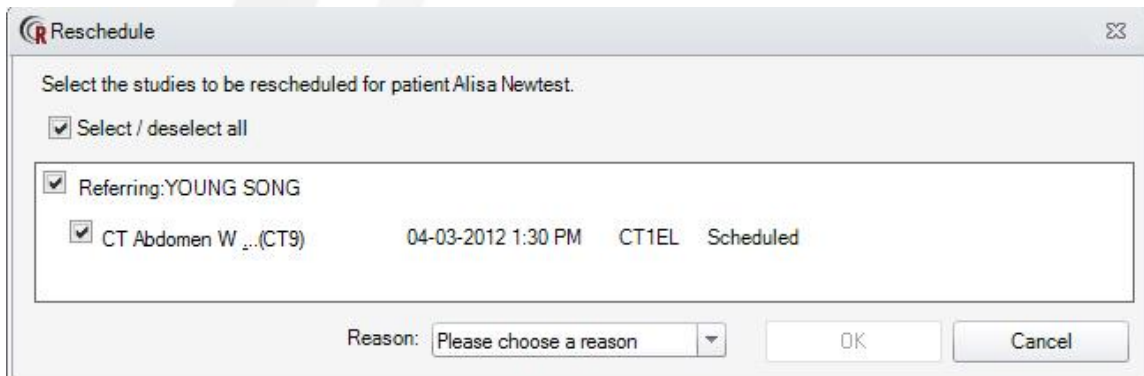
4. Click OK once a reason is selected, or click the Cancel button to abort the reschedule procedure.

5. If OK is selected, the full appointment record is displayed. Click the Schedule tab to find a new day and time for the appointment.

6. Choose one of four buttons at the bottom of the page to process this change:

   Schedule Later -- This selection saves the order to the Orders to Schedule Worklist.

Cancel Study -- This selection cancels the procedure altogether. A prompt pops up to confirm this action, as it will remove the appointment and procedure for this patient. The appointment cannot be rescheduled.

Schedule -- This selection schedules the procedure on the new date selected.

Close -- This selection closes the Reschedule page and prompts the user on whether to save changes.

Note that all exam-level attachments will transfer with the appointment. If Schedule Later is selected, the user will be prompted to save those attachments at the patient level, so as not to lose the information.