Rev 2/13/18

Master Order Processing

This contains processes for analog, efax, SCMG e-order, website and in-person:

ANALOG FAX:

- Faxes that are still sent to the front desk are notated with Greg Nesler the marketer.
- Orders should be processed if not already in RIS.
- Check Pt. chart for duplicate requested exams before requesting a new order.

IN PERSON:

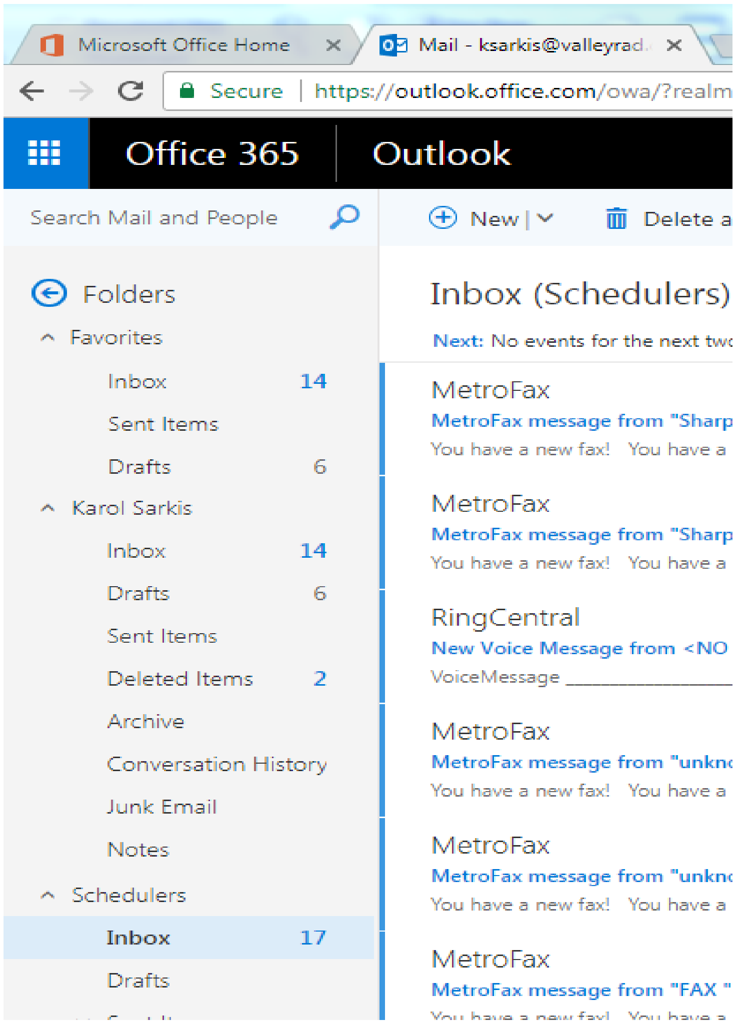
- Patients that walk in to schedule will be added to the schedule either the day of, or at the patient's preference.
- If the pt. walks in with an order and needs additional documents, schedule the pt. and initiate the "**Chaser**" process. **THE PT WILL BE INFORMED THAT THEY WILL BE SCHEDULED OUT AND DOCUMENTS WILL BE OBTAINED AS NEEDED.**
- **ALL STAT PTS WILL BE ADDED TO THE SCHEDULE, INFORM THE TECHNOLOGIST OF ANY ADD ONS.**
- **REFERRERING PHYSICIANS WILL OBTAIN STAT AUTH, FOLLOW UP IF AUTH ISNT IN THE SYSTEM AT THE TIME OF THE APPTOINTMENT.**

WEBSITE ORDERS:

- Check for pt. existing acct in RIS
- If pt. is not in RIS, documents that are needed should be requested on **"referring provider checklist form"** and faxed to pt referring doctor.
- Follow up with the pt. to confirm online requests have been received and clarify status of pending appt.

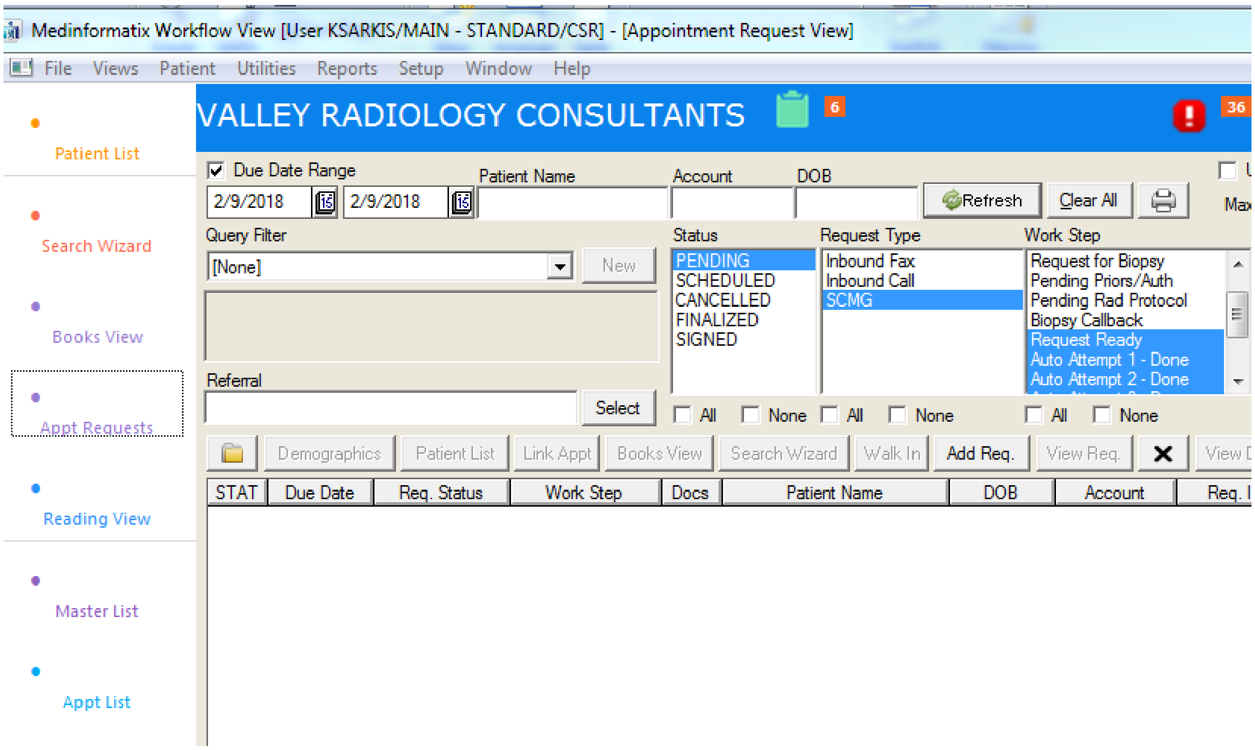
E-Fax Processing using Nuance PDF Software

Step 1: Open Valley Radiology Email Folder "Schedulers" and click "Inbox"

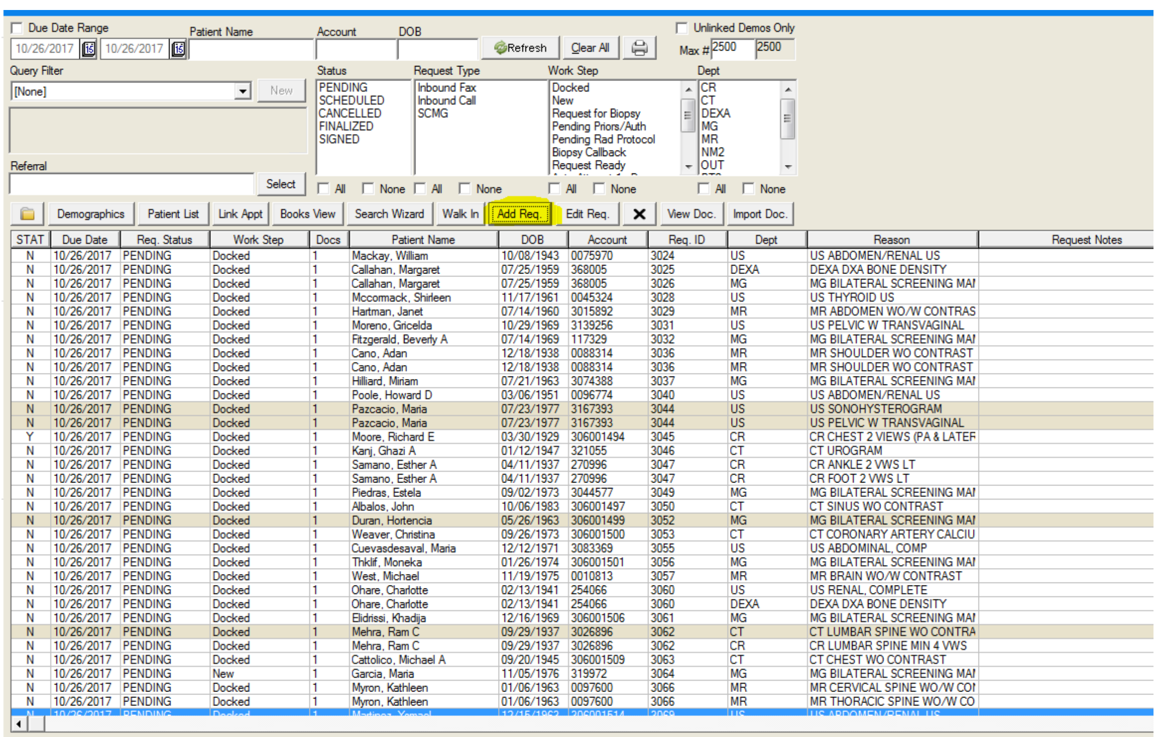


Step 2: Go to Medinformatix to verify if order is not in our system

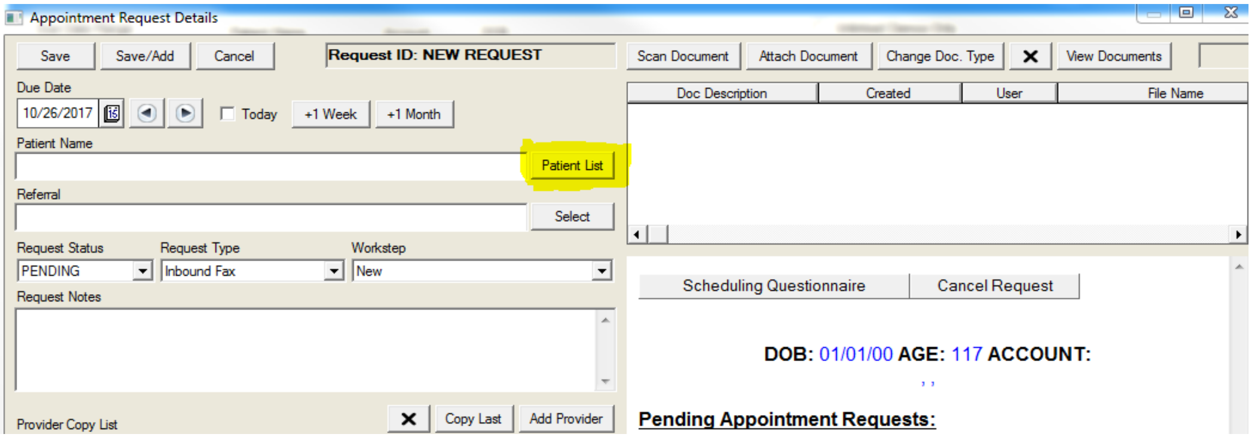
Step 3: From Medinformatix Tree click on "Appt Requests"

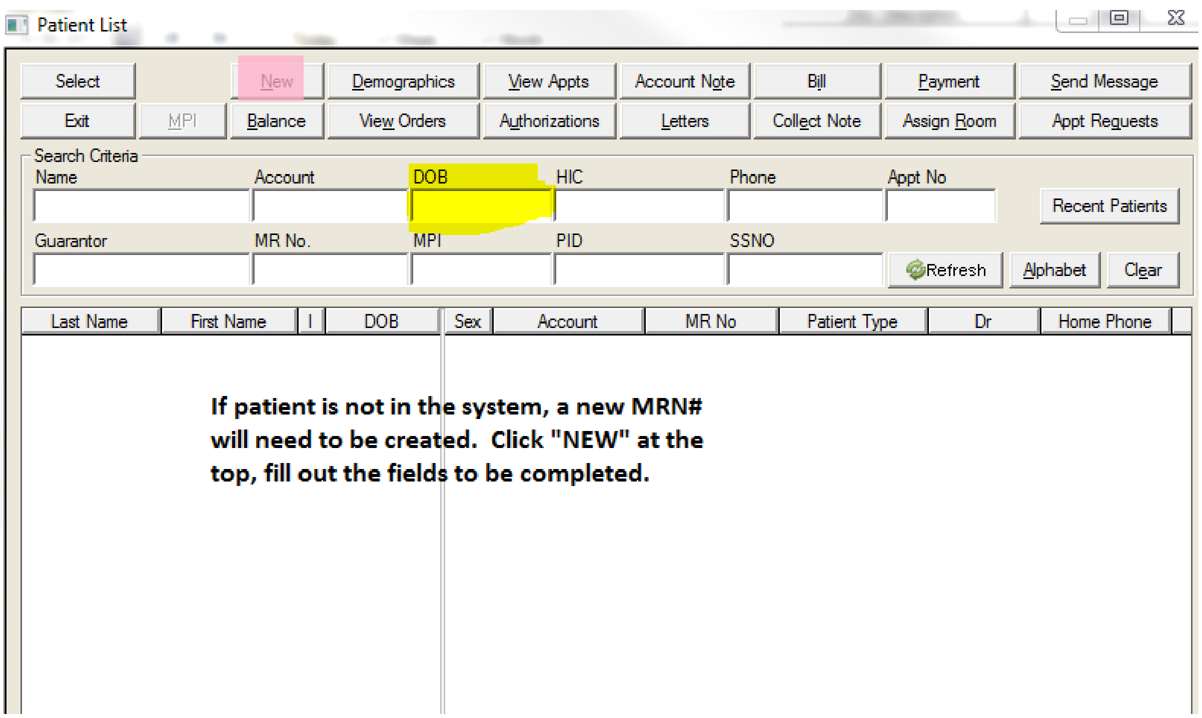


Step 4: Once in "Appointment Request View" then click on "Add Req."

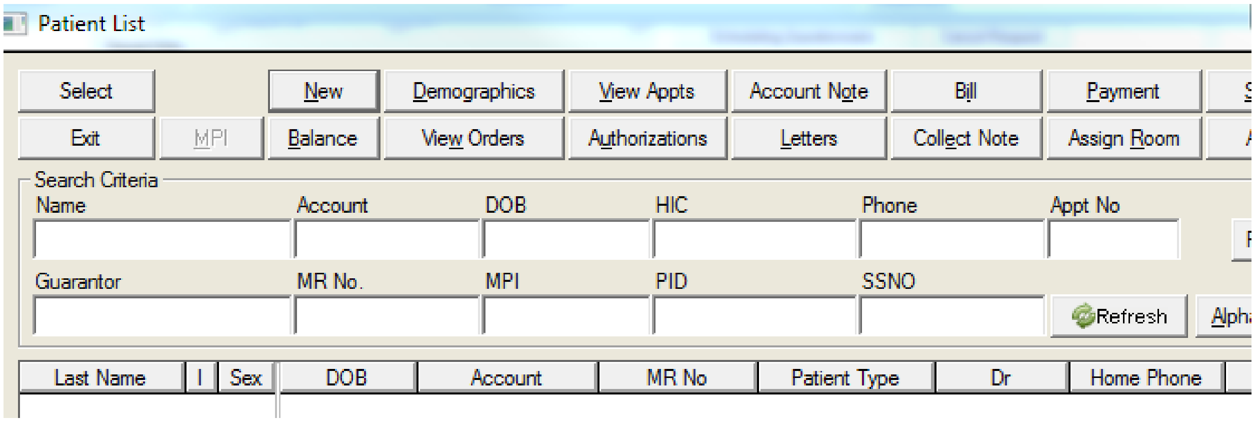


Step 5: "Appointment Request Details" will open up then click on "Patient List" – Search for patient by DOB and click Enter

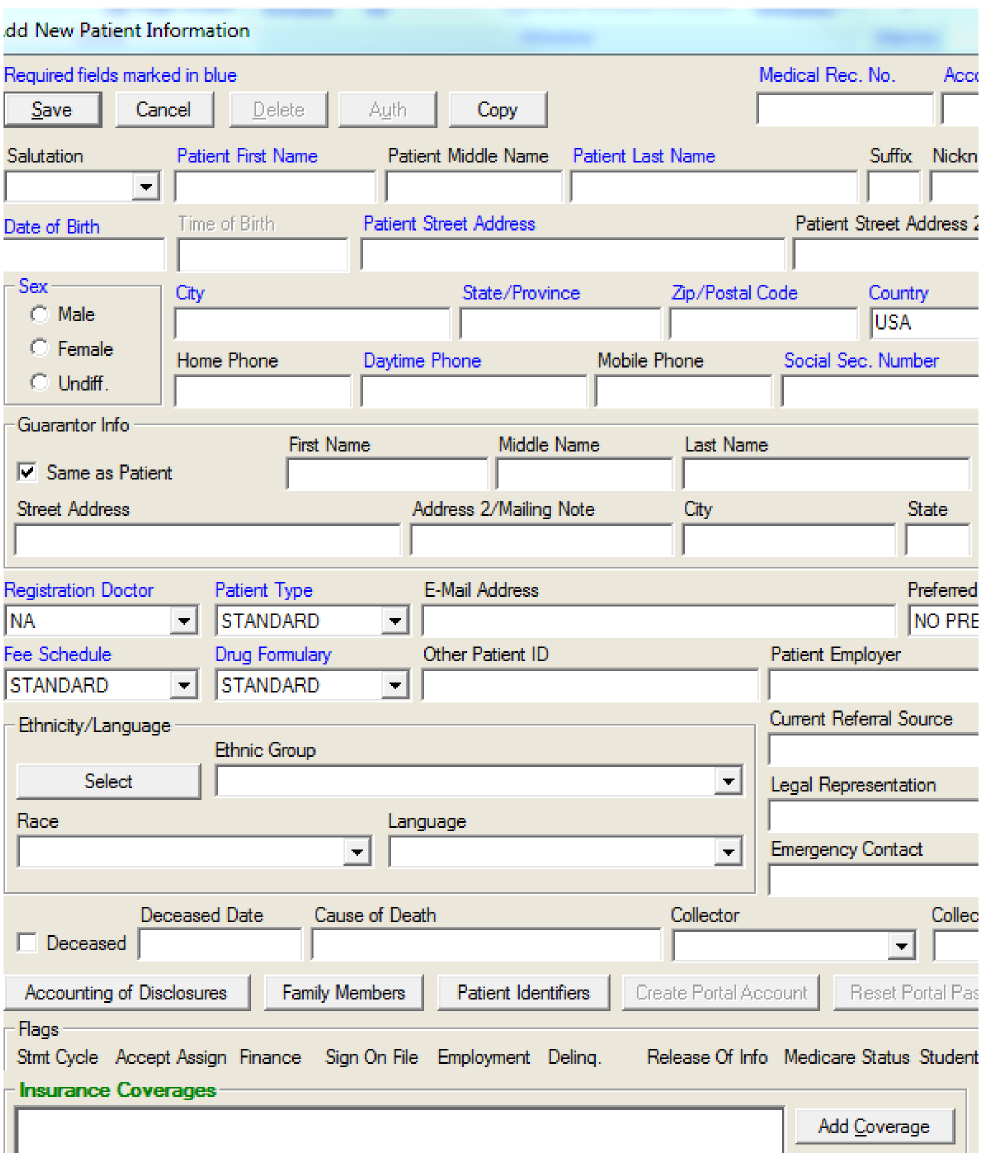




a. If patient is not in the system "Patient List" then click "New" to establish a new patient record



b. "Add New Patient Information" window will pop open and click "Auto" for system to automatically populate "Medical Rec. No." and "Account No."

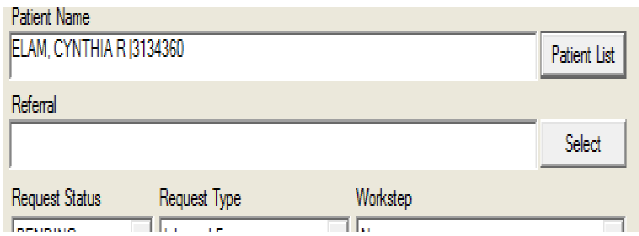


c. Fill in information in the required fields marked in blue then save
   - Make sure address, insurance, phone #s are included
   - Also fill in “E-mail Address” and “Preferred Communication Method”
   - If no social security # then input 000-00-0000.

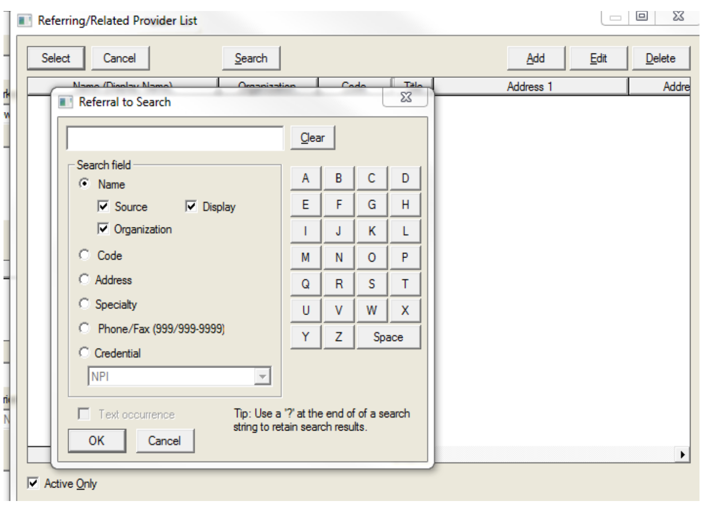
d. Click Save and “Patient List” window will appear

e. Once patient is identified, highlight then click “Select”

Step 6: “Appointment Request Details” window will open – go to – “Referral” field to select referring doctor and click “Select”



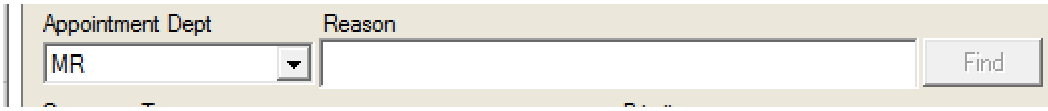
Step 7: “Referral to Search” window will open – input referring Doctor’s name and click “Ok” or use other ways to find the referring doctor such as phone # or address.



Step 8: Once the correct Doctor is identified (verify address and phone #) then double click on the doctor and click “Select.”

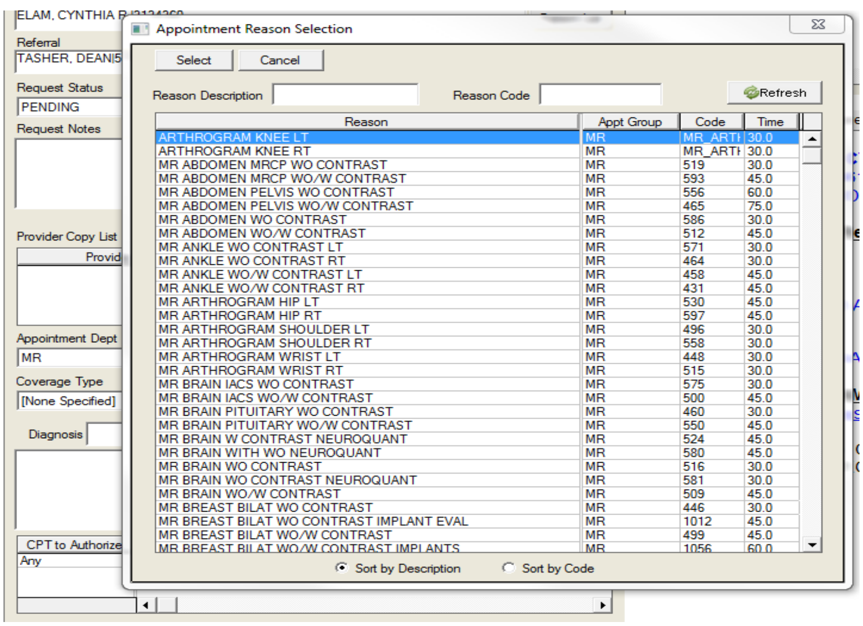
Step 9: “Appointment Request Details” window will open - In order for the patient to be called automatically go to "WORKSTEP" dropdown and select "DOCKED"

Step 10: Go to "Appointment Dept" dropdown and select the relevant modality



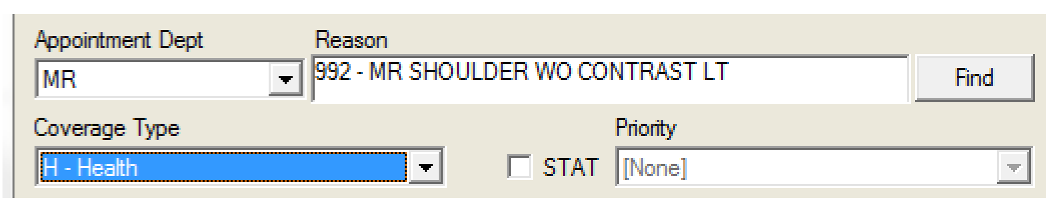
Step 11: Will be routed to "Appointment Reason Selection" window – identify and pick the right procedure and click "Select"

a. Note: Screening Mammograms are always **"Bilateral Screening"**
b. Diagnostic Mammograms are (1st one) **"Bilateral Diagnostic" or "left" or "Right" Breast**



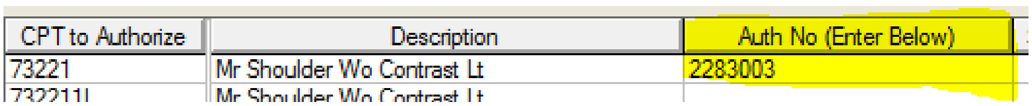
Step 12: "Appointment Booking Message" window will appear. Then click "Exit"

Step 13: If patient health insurance information is available then go ahead and select "H -Health" if there is NOT then you could leave it blank or select what best describe the "coverage type"



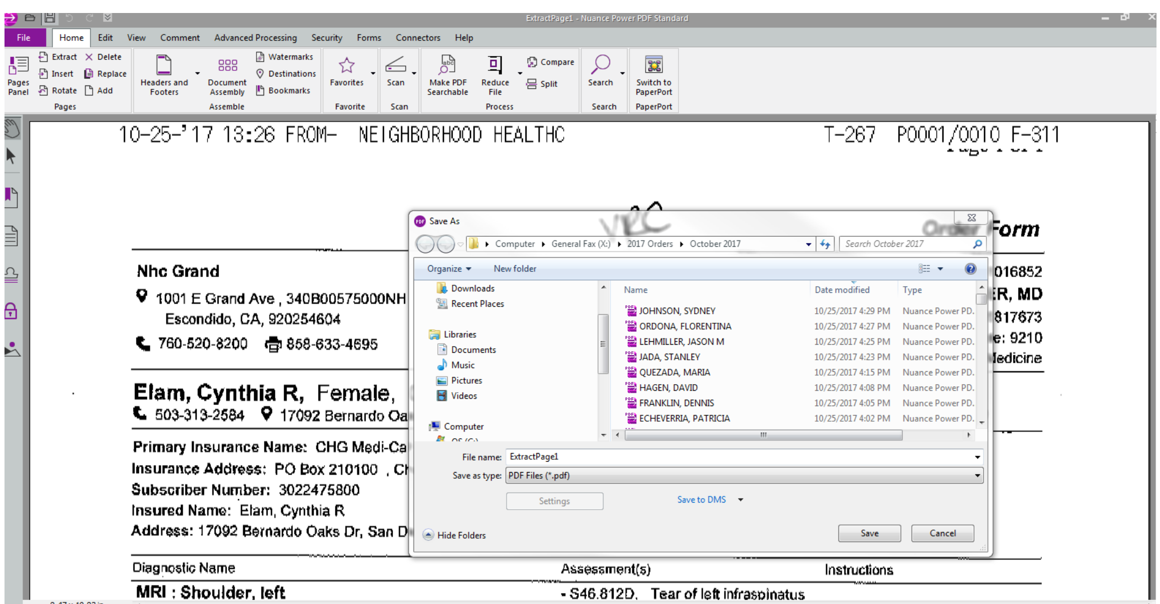
Step 14: Go to “Diagnosis” field and enter diagnosis code-if given- should be on patient order, under “Reason for Exam.” It should be a letter and a number. Then hit “Tab” if more than one diagnosis code exists then add another diagnosis code and verify.

Enter Diagnosis if given

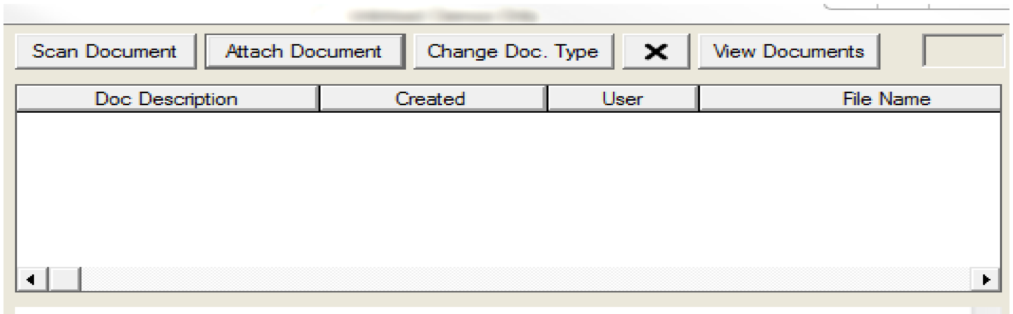


Step 15: Go to “Auth No (Enter Below)” field and enter Authorization No. – It should be with patient’s order on a separate sheet.

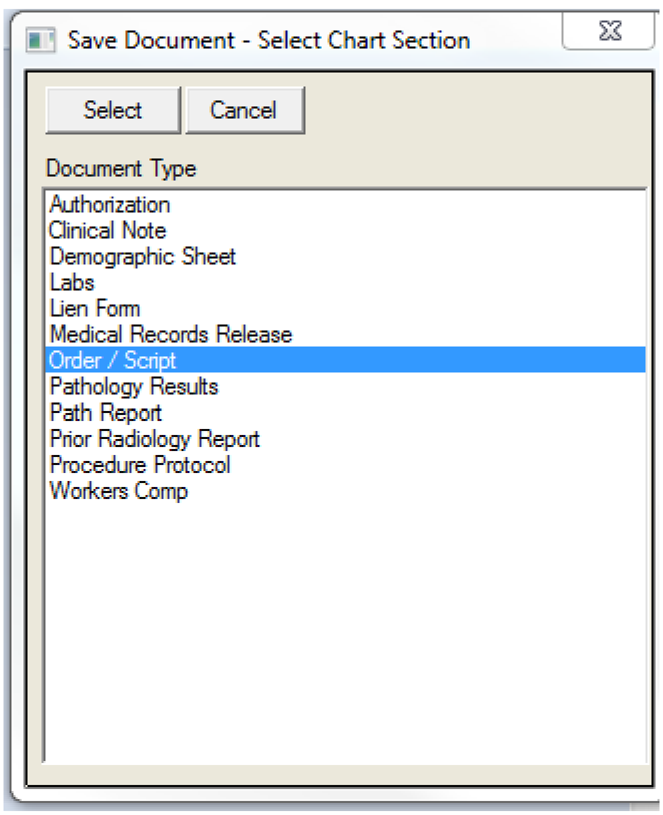
Step 16: Go to the fax right click and "Save As" Last name, First name it will prompt you to a PDF extract the file and select the pages to be save in our "GENERAL X DRIVE" again rename by last name, first name. After saving close pdf.



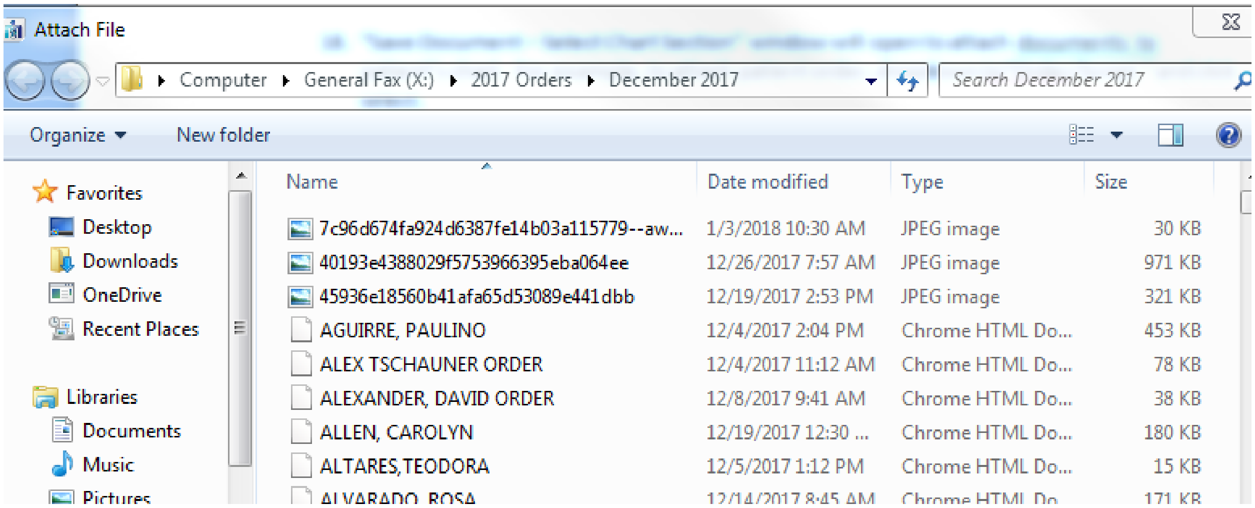
Step 17: Go back to Medinformatix - "Appointment Request Details" and select "Attach Document" - to attach documents to patient's chart. You may attach documents such as Dr. notes/Clinical notes, primary or secondary insurance.



Step 18: "Save Document – Select Chart Section" window will open to attach documents to patient's chart. For example, to attach patient order, dropdown to "Order/Script," and click select.

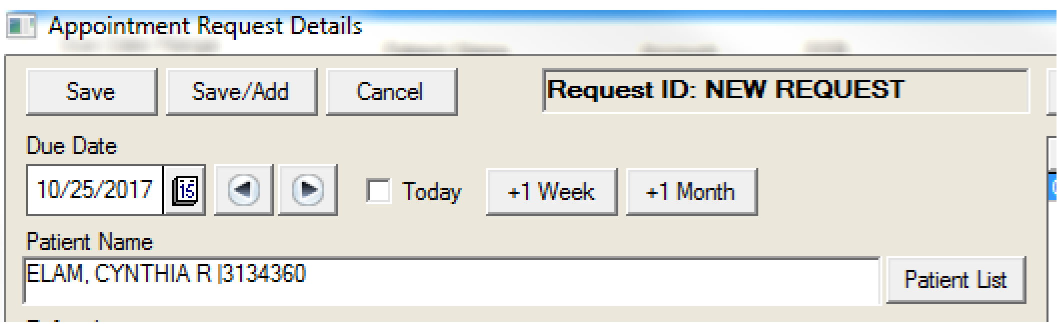


Step 19: "Attach File" window will appear then pick and highlight patient's order for example (TEST, BETTY ORDER) and click on "Open." Repeat steps for each attached document such as authorization, lab works, clinical notes and etc.



Step 20: Once all documents are attached to confirm the attachments then double click on "View documents" – all attached documents should appear on this screen. Then Exit

Step 21: If there is no more order/attachments to enter then select the "save" bottom or "save/add" if needed



Step 22: Go back to download and Exit

Step 23: Once all is done then delete email from Valley Rad Email page

IF ADDITIONAL DOCUMENT IS RECEIVED AND ORDER IS IN THE SYSTEM ALREADY,

Step 1: Click on "patient list"

Step 2: Search by DOB locate patient (double click on patient name)

Step 3: Locate exam scheduled from paperwork/fax received

Step 4: Click on "RESPOSITORY"

Step 5: Depends on what kind of paperwork/fax you received (ex: AUTH, LABS, Clinic Notes, Eligibility) on the "document repository" screen, click on "IMPORT"

Step 6: Choose "Document Type" select document you have saved on the "unprocessed folder"

Step 7: SAVE

FOR X-RAY ORDERS

Step 1: Print patient order and save to “Computer General Fax”
Step 2: Double click on X-Ray 2018 orders – whatever month you’re working with (for example if you’re in “February” then click on month of February
Step 3: Add patient name and save

PATIENT WITH PENDING REQUESTS FOR TODAY/FUTURE EXAMS

Step 1: If patient has today and future exams – Go to Medinofromatix Big Tree to “Patient List”
Step 2: Enter DOB
Step 3: Double click on Appt.
Step 4: Repository
Step 5: Save order – Insurance
Step 6: Back to Repository to “Import”

Step 7: “Appointment Request Details” will show the patient and look for pending request for today and future exams.

IF NO PENDING ORDER OR NO APPOINTMENT IS SCHEDULED

Step 1: Create an order on patient chart

Step 2: Highlight and click on “copy” patient name from Medinformatix

Step 3: Click on download button from the email order

Step 4: Open the download and do “Ctrl P” to print – document must be in “Cute PDF Writer” or “Nuance” page 1 and hit print

Step 5: Printing Screen (Save as box) appears – Paste the saved patient name and save and type in the name of the document such as (Order, Authorization, Lab Work, Insurance Card)

Step 6: If there is a 2nd page – then click print to print 2nd page – (Save as box) appears – Identify the patient and save patient name and “Insurance Card” and click save

Step 7: Close download

SCMG E-Orders Workflow

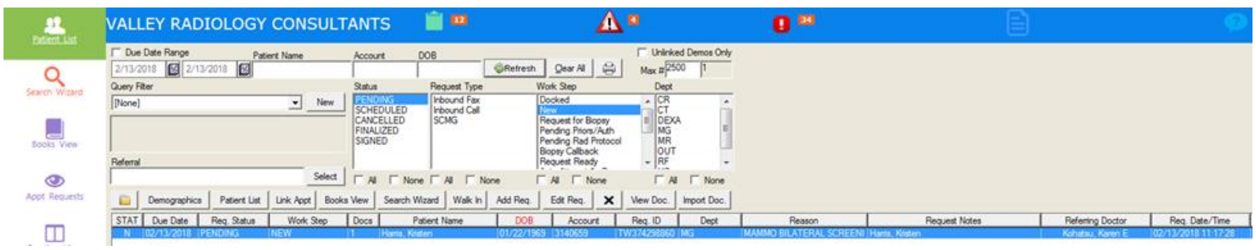
How to dock a SCMG E-Order

Step 1: Select the Appt. Request View(ARV)

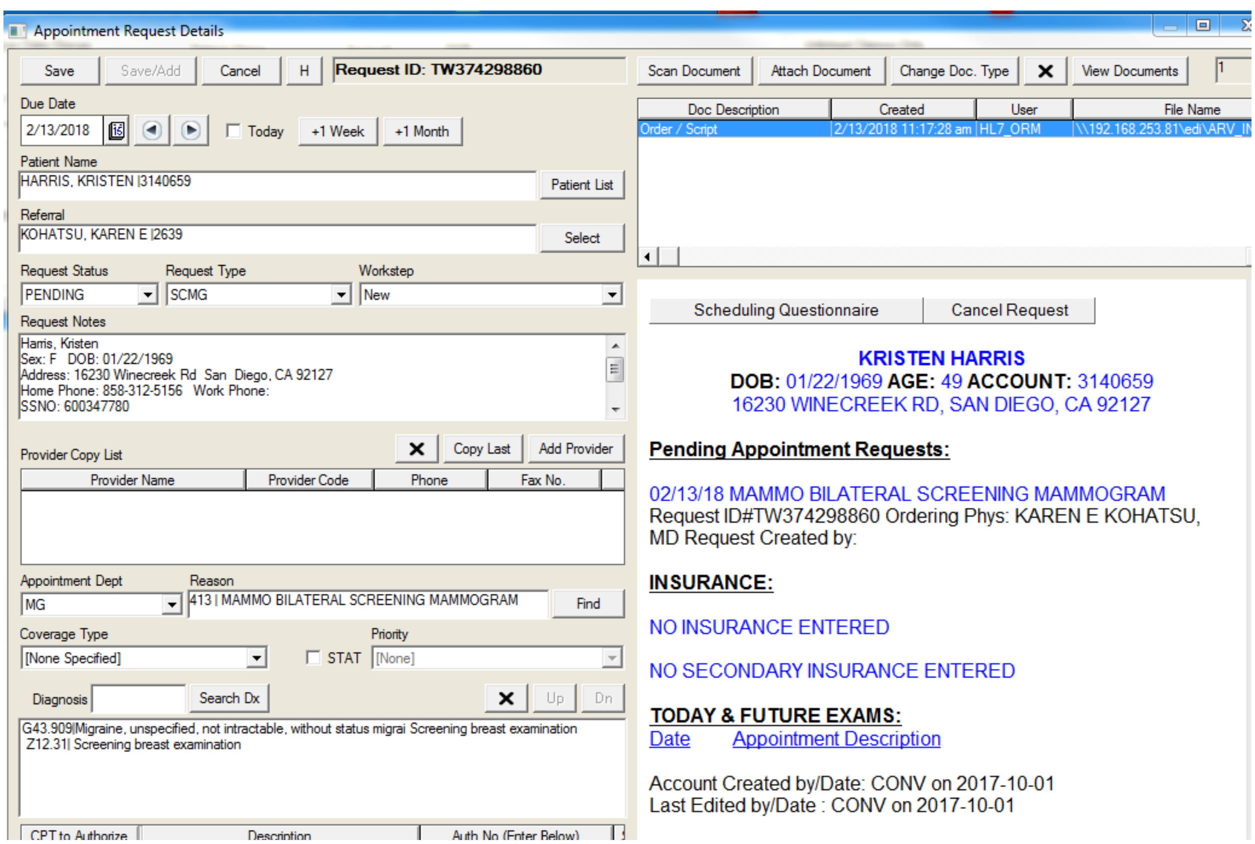
Step 2 Un-select the Due Date Range

Step 3 Select PENDING in Status and Select NEW in Work Step; click Refresh.

Step 4 Select patient. Note the TW00000000 under the Req. ID tab – this denotes they are SCMG orders.



Step 6 click – Edit Request button. Anew drop down will appear named Appointment Request Details.



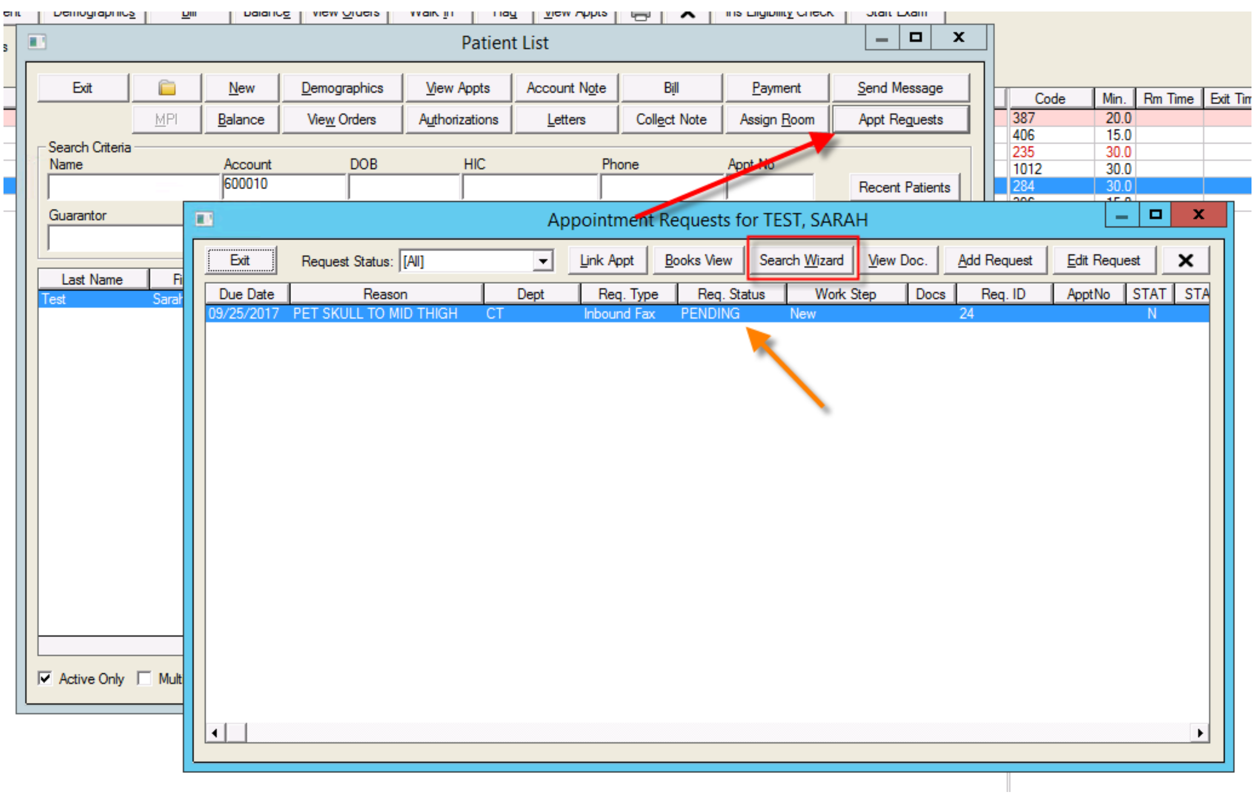
Step 7 Click the drop-down menu in Workstep: Then change from NEW to DOCKED:

Step 8 click SAVE

Steps to locate an SCMG E-Order in MI

If a patient comes to the front desk to schedule an appointment, you will want to check in the Appt Requests to see if an order **already exists.**
To do this, follow the below steps:

1. When you go to search for the patient using the PATIENT LIST, make sure to click on the 'Appt Requests' button on the top right. (red arrow)
2. When the Appt Requests screen opens, you will want to look for PENDING requests. If there are no pending requests, then you will need to look in the Unprocessed folder (on the fax server). If there is pending requests (orange arrow), you can schedule that order straight from this screen by using the Search Wizard button (red box). It will then default everything from the order in the search wizard for you automatically, and the only thing you'll need to do is find the time/date the patient wants to come in and set the appointment. Make sure you are still filling out the scheduling questions (this will be in the Search Wizard to fill out using the 'Scheduling Questionnaire' button on the Patient Summary).



Changing an E-Order Protocol

- If an E-Order needs to be changed **DO NOT** change it in MI.
- Authorizations Department will change the order and authorization if they recognize it is incorrectly ordered.
- VRCMG staff will call the referring physicians office to change the order in their EMR; not MI.

If the patient is in office: Call the referring physician's office and let them know the patient is waiting in the office; ask if they can expedite the order change and authorization if needed based on the radiologist protocol. If they cannot; the patient will be rescheduled. VRCMG will NOT request to have a paper order faxed.

- Technologist will monitor the SCMG As-Requested folder for the new order; or designate a staff member to watch for it. (When the [-order is changed by referring physician the patient appointment will disappear from the RIS schedule; the new [-Order will be rescheduled in the open spot if in a reasonable amount of time; patients should not wait longer than 30 minutes; case by case basis and Site Lead may request to reschedule patient instead of having them wait)
- VRCMG will make notes in the Administration Tab notes section about calling office to change order etc.
- VRCMG will communicate to the patient that their order and authorization is being changed based on the Radiologist protocol for safety; the Authorization to be changed so they do not receive a bill from their insurance company. The patient can make the decision to wait or reschedule depending on procedure. The patient may call VRCMG within 2 hours to re-schedule or we can offer to call them when VRCMG receives the new E-Order. Apologize for the inconvenience.

Changes within 24-72 hours & scheduled patients: Call the referring physician's office to request to the E-order and authorization to be changed per radiologist's protocol.

- VRCMG staff will then call the patient to reschedule the patient within 5 days of the original appointment date. This allows time for the new E-Order and Authorization to be updated. **DO NOT** Cancel the exam or change the exam in RIS.
- Technologist will make notes in the Technologist Notes section in MI about the E-Order change so that VRCMG staff does not schedule the patient. (The incorrect E-Order will disappear when it has been changed by the referring physician)