SCHEDULING IN MEDINFORMATIX

Start in the Search Wizard.

• Books View is only used if the procedure is a STAT and there are no appointments available.

When a patient calls in to schedule an appointment, you will want to follow the steps below (All Steps are connected to an arrow in the screenshot):

Step 1: Click on the Patient list Button

Step 2: Search for the patient. Use either the Name, Account, DOB, Phone or Appt No Fields and click Enter.

Step 3: Once the patient is found, highlight them and click the Demographics button.

- Verify patients Address
- Verify patients Phone number (home and cell)
- Verify patients email address
- Verify patient's "Preferred Communication Method" (Call, text, or email)
- Add/Verify the patients Insurance Make sure insurance information in the "Insurance Coverages" window is accurate.
 - If Patient is Self-Pay Click on "Add Coverage"
 - "Insurance Search" window will pop up and input "SELF" and click OK
 - "Insurance Carriers" window will pop up highlight "SELF PAY" & click "Select"

- "Patient's Insurance Information" window will pop up, add "5" in the "Insured ID/HIC" window, then click "OK"

Insurance Carrie	r		Remove Eligibility	ОК	Cancel
SELF PAY (SELFPA	Y00000001)	Change	Employer		
Ins. Plan Type: STA	NDARD				C <u>h</u> ange
Coverage Level Secondary	Coverage Typ S - Selfpay	e Fom H1			
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First Name	Middle Name	e Last Name	Suffix	Pat. Relation	
вени		ILEST		1 - Self	•
Date of Birth	Address		Address 2		
03/03/1955	8851 CENTER DR	STE. 3061			
Gender	City	State/Province	Zip/Postal Code	Country	
O Male	LA MESA	CA	91942	USA	▼ H
• Female	Insured Phone	Insured Group	Insured ID/HIC	Special Info	
O Undiff.	619/589-8628		5		
Insurance Plan			Member ID	Financial Responsit	bility Type
		✓ <u>S</u> et Plan Profile			-
MediMedia Payor					
		Change	1		

Click Save button - Screen will automatically route you to Patient List Screen

Step 4: Click on Appt Requests button -

	Facility (Group		Multi-F	Facility Filter				P	atient Name				
1 Month	[None]		•	CB				⊡ear	IF				_	Patient List
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Exit	MPI	Balance	View Or	ders	Authorizations	Lett	ers	Collect N	lote	Assign Room	Appt F	equests		
Search Criteria		ST	EP 2									- X		
Name	-	Account		DOB	HIC		Pho	ine		Appt No				
TEST											Recen	t Patients		
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]										Refresh	Alphabet	Clear		
Last Na	ame	First N	lame	I	Account		D	OB	Se	x MR	No	F		
Test		Aa-test		M 3	3018879		06/20/	2011	М	336416		SEL		
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Test		Adam		3	3003188	(01/25/	1997	M	318189		SELI		
Test		Allscripts		2	3064199	1	01/03/2	2001	F	382446		SELI		
Test		Allscripts		3	3118718	(03/29/	2010	M	436960		SELI		
Test		Allscripts		3	3135782	(05/17/	1979	F	454020		SELI		
Test		Andrew		2	3053574	(01/01/2	2000	Μ	371821		SELI		
Test		Annabelle	÷	3	3096635	(01/01/2	2001	F	414882		SELI		
Test		Betty		3	3154394	(03/03/	1955	F	472630		SELI		
Test		Big		1	3108957	(01/01/2	2001	M	427199		SELI		
Test		Breast		3	3099569	(01/12/	2013	F	417816		SELI		
Test		C2c		3	3071181		10/11/	1988	M	389428		SELI		
Test		Carm		3	3054012	(06/12/	1984	M	372259		SELI		
Test		Carol		(074853		10/20/	1955	F	317662		SELI-		
-							4							

When the "Appointment Requests" screen appears, check if patient already has any **PENDING** requests.

SCENARIO 1: PATIENTS WITH PENDING REQUEST(S).

Step 1: From "Appointment Requests" screen, highlight the pending appointment you would like to schedule for and click on "View Doc" to verify and confirm order information with patient to make sure the correct procedure is being scheduled. In this example, a MRI of Cervical Spine WO Contrast procedure is being scheduled. Confirm with patient to make sure it's the right procedure.

Step 2: Once confirmed then click on "Edit Request." This will route you to "Appointment Request Details" (patient chart). Here you must verify procedure matches what referring Doctor ordered, lab work and other necessary documents.



Appointme	ent Requests for TEST, BETTY	-	-					
Exit	Request Status: [All]	•	Link Appt	Books View Se	earch <u>W</u> izard <u>V</u> i	ew Doc. <u>A</u> dd Request	<u>E</u> dit Req	uest
Due Date	Reason	Dept	Req. Type	Req. Status	Work Step	Docs Req. ID	ApptNo	STAT
09/25/2017	CT PET SCAN	CT	Inbound Fax	CANCELLED	New	15		N
10/04/2017	MR CERVICAL SPINE WO CON	i MR	Inbound Fax	PENDING	New	444		N
11/15/2017	CR ABDOMEN COMP ACUTE S	SECR	Inbound Fax	PENDING	New	4794		N
11/29/2017	PET SKULL TO MID THIGH	СТ	Inbound Fax	CANCELLED	New	5383		N
12/18/2017	PET SKULL TO MID THIGH	CT	Inhound Fax	SCHEDULED	Docked	6791	5019374	N

Step 3: Once all details are verified then click Save, system will route back to "

"Appointment Requests."

Appointment Request Details					a 8 C		Ŀ
Save Save/Add Cancel H Request ID: 4794		Scan Document	Attach Do	cument C	Change Doc.	Туре 🗙	View Documents
Due Date		Doc Descrip	otion	Creat	ted	User	File Name
11/15/2017 🔢 💽 🔽 Today +1 Week +1 Month							
Patient Name							
TEST, BETTY 3154394	Patient List						
Referral							
MISC, DOC 13464	Select						
Request Status Request Type Workstep							

NOTE: If there are multiple pending orders in the system and patient would like to

schedule appointments the same day then highlight each pending order and click on "Search Wizard."

Appointme	ent Requests for TEST, BETTY	-	-	-	_		
Exit	Request Status: [All]	•	Link Appt B	ooks View Sear	rch <u>W</u> izard <u>V</u> iew [)oc	<u>A</u> dd Re
Due Date	Reason	Dept	Req. Type	Req. Status	Work Step	Docs	Re
09/25/2017	CT PET SCAN	СТ	Inbound Fax	CANCELLED	New		15
10/04/2017	MR CERVICAL SPINE WO CON	MR	Inbound Fax	PENDING			444
11/15/2017	CR ABDOMEN COMP ACUTE S	ECR	Inbound Fax	PENDING			4794
11/29/2017	PET SKULL TO MID THIGH	CT	Inbound Fax	CANCELLED	New		5383
12/18/2017	PET SKULL TO MID THIGH	СТ	Inbound Fax	SCHEDULED	Docked		6791

Step 4: The Multi-Part Appointment Request Selection screen will appear. This is where you can change the appointment to reflect what's on the order (if necessary) or add other appointments.

- 1. If Patient only needs/requests one appointment, then click "Continue" button which will route you to "Search for Appointments." Follow **Steps 5 (1-6) below.**
- If Patient also needs another appointment added from an existing order then click (check) the box "All Pending Requests For Patient" - the Screen will show all pending requests



- O X Multi-Part Appointment Request Selection [Test, Betty - 3154394] Cancel Pending Requests For Patient Appointment Book/D T STAT <None> -Select STAT Due date Work Step Docs DOB Req. ID Dept Reason 03/03/1955 4794 11/15/2017 Net CR CR ABDOMEN COMP ACUTE S

- 3. If patient needs another appointment added without an order for example, a Lumbar Spine Xray.
 - a. Add the exam to the top bar under "Appointment Book/Dept" by scrolling down for different modalities.
 - b. For "Reason" click on "Find" to go to "Appointment Reason Selection." Identify the specific procedure.
 - c. Click Select
 - d. Then use the Blue Plus button to add that exam to the selection screen.
 - e. Once appointment is added then click "Continue" button.
 - f. "Appointment Booking Message" will pop up with specific appointment guidelines such as weight limits, so Schedulers will know where and when to schedule.
 - g. Once done with guidelines then click "Exit"

ľ	Appointment Booking Message		23
	Exit		
	WEIGHT LIMITS FOR PTS: ELM-500/GW-400/CB-400 LBS DAYS TO SCHEDU SUN/ GW: M-F/CB: M-F IV CONTRAST: M-F 8:00-4:00	LE: ELM: M-	^

STEP 5: "Search for Appointments" Screen appears, ask patient if they are claustrophobic then follow the steps below:

1: Make sure the "Facility Group" indicates "All Facilities" except for

- If patient is claustrophobic then "Facility Group" should indicate only "Escondido." Or
- If patient wants to go to a specific facility, then "Facility Group" should indicate so.

2: Click on Scheduling Questionnaire, "SCREENING QUESTIONNAIRE" window will open, then "Add new" to populate questions for different modalities. You should fill this out for **every** patient. The top questions that are not modality specific are suppose to be filled out for every exam type. Then if the appointment is for a specific modality, then scroll down to the modality and answer the questions accordingly. Once completed then click on "Done." Then "Exit" out of "SCREENING QUESTIONNAIRE" window.

3: "Search for Appointments" window will open, under "Starting Date" select the date

range that you want to start searching for an appointment.

- 4: Click the 'Search' button
- 5: Highlight the time that the patient agrees on coming in
- 6: Click the 'Set Appt' button

3	STEP 3		11-112	Search for Ap	pointments		
Starting Date		Facility Group	Multi-Fac	ity Fiter		Patient Name	
10/27/2017 📓 💽	Today +1 Week +1 Month	[None]	ELM		<u> </u>	lest, Aakest M (3018879	Patient List View Appts
Start Time End Time		Step 1 🥒	OUT			Referral Source	Lost Regged
		Schedule Type				Test Physician. Test Physician/11141	Select
acility Assigned to Wizard	Wizard Gmup	Appointme	ent Wizards			Patient Summary	
Any]	- [None]	▼ [Select M	lanually]				
Appointment Book	Reason		Day	Lag Minute	s Alotted Seq	Scheduling Questionnaire	Pending Requests
(CR)	221 CR CERV	ICAL SPINE 2 OR 3 VWS	Find	• 0 •	15.0 0	- +	
<none></none>	-		Find 0	- 0 -			
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<none></none>	-		Find 0	- 0 -		M	IN: 3018879
<none></none>	*		Find 0	- 0 -		- DOB: 06/20/ Home Phone: 999/999-9999 Da	11 AGE: 6 yrs. SEX: M ytime Phone: 999/999-9999 Cell Phone
(None)	+		Find 0	- 0 -			yenne Phone: 555,555 5555 cen Phone
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(None)	·		Find 0	× 0 ×		-	
			1	STEP 5		Today and Future Appointment	5:
Book	Facility Ac	otDate Day Ti		Show first appoints	ment in set only	Date Appointment Descript	ion
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3 ELM_CR1	ELM 10/27/	2017 Friday 01:30 Pf	M 0	hoices M	ax. Days	Past Appointments:	
				3 - 6	• •	Date Appointment Descript	ion
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		ST	EP 4			Last Edited by/Date : EIS on 201	7-10-27
				Beset Lags	1		
			-	Search	and Next Service	e [
			Ļ	Source 1	Carden Trees		

The Confirm appointment screen will pop up. You can add any appointment notes, such as

- Name of patient's insurance on file
- Add authorization # if it exists
- Add facility and date of lab works completed if procedure requires lab work done.
- Change referring physician
- Make the appointment a STAT/ASAP.

If 2nd exam exists for the same day, then copy and paste notes to the 2nd exam.

If appointment is a STAT then drop down the STAT box and select "STAT"

Once everything has been filled out, click 'OK' to schedule the appointment.

"Edit Chart Document" screen will open – Appt. prep identifies patient instruction.

- a. Convey instructions to the patient. Details such as Appointment instructions (date, check-in time and location, and length of exam).
- b. Notify patient to arrive 15 minutes early for all modalities except for MRIs which are 30 minutes early arrival time.
 - Note: First MRI at Gateway (Poway) check in at 6:45 a.m.
- c. Click on "Save to Chart" then click Exit.
- d. Scheduling Screen will pop open then Exit

	Confirm Appointment	
OK A Cancel	Cr eate One Time Autholization Appointment Note	
pointment Date: 10/27/17 Friday	A	
Patient mill show up at: 12:30 PM		
ual Book Appt Time: 12:30 PM Length of Appointment: 15.0 min.		
Reason: CR CERVICAL SPINE 2DR 3 VWS Patient: TEST, AA-TEST M (DOB: 06/20/2011) Book: ELM_CR1		
	v Coverage Type IN - Heath	A
1 STAT p _d .* I _[None]	A R _{efern} l Source IT Physician. Test PhysicianI11141	Seled
Screening Questionnaire	Ι	es



		Referral Profile	I		Preferences	
	Name: TEST PI Specialty: Unki Address: None Tel#: None Fax#: 555/555-{	HYSICIAN TEST PHYSICIAN nown		NM I		
I	CC D	octor Profile		F	Preferences	
[No CC <u>D</u>	octors Entered				<u>N/A</u>	
Order Diag	gnosis Informatio	n				
I Ra	nk l	Diagnosis		D	escription	
ľ	NIA	NIA		NIA		
Order Proce	dure Notes					v

SCENARIO 2: PATIENTS WITH NO PENDING REQUEST(S).

From the Search Wizard screen, after verifying/updating demographics and insurance:

Select "All Facilities" under "Facility Group."



i Medinformatix Work	flow View [User KS	ARKIS/MAIN - STANDARD/CSR]	- [Search for Appointments]						0 X
File Views Patie	ent Utilities Rep	orts Setup Window Help								_ 8 >
•	VALLEY R	ADIOLOGY CONS	ULTANTS	Δ	2		0 2			
Patient List	Starting Date		Schedule Type	Facility Group			Multi-Facilit	y Filter		
	2/5/2018	Today +1 Wk	+1 Mth [None]	✓ All Facilities			СВ			Clear
Search Wizard	Start Time Er	nd Time					GW			
(07:00 AM 💌 0	9:00 PM 👻 🗆 AM 🗖 PM 🔤	Mon 🗹 Tue 🔽 Wed 🕅	🛛 Thu 🔽 Fri 🔽 Sat	Sun		OUT			
•	Facility Assigned to	Wizard Group		Appointment	t Wizards					
Books View	[Any]	 [None] 		 [Select Mar 	nually]					•
	Appointment B	ook	Reason			Day	Lag N	linutes	Allotted	Seq
•	1: [US]	•	826 US ABDOMINAL, COM))	Find	0	- 0	-	30.0	0
Appt Requests	2: <none></none>	•			Find	0	- 0	-		
•	3: <none></none>	*	[Find	0	- 0	-		
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	5: <none></none>	v			Find	0	- 0	-		
Master List	6: <none></none>	Y			Find	0	- 0	-		
	7: <none></none>	V			Find	0	- 0	-		
•	8: <none></none>	Ψ.			Find	0	- 0	-		
Appt List	Patient Summary				Patient Nam	е				
•				~						<u>P</u> atient List
Orders							⊻iew Appts	Last Flag	jed	
					Referral Sou	rce				
•				-						Select
Reset	Appointment Cho	bices	1	- 1 -			Show first appo	ointment in set	only	<u>R</u> eset Lags
		Book Facility	ApptDate	Day Time						

- Select/enter type of exam under "Appointment Book." In this example an Ultrasound Abdominal Comp. is being scheduled. "Appointment Reason Selection" window will appear – select the specific exam then click Select. "Appointment Booking Message" will pop up with specific appointment guidelines such as weight limits and for schedulers to know when and where to schedule. Once done then click "Exit."
- Enter referring physician name under "Referral Source" click on "Select"
 - Enter referring physician's last name then click "Enter"
 - If multiple Doctor's with the same name then highlight the correct Doctor, locations and click "Select"

Some physicians have multiple addresses, please verify with patient which location they go to.

If the physician is not in our database, click "Add." Please obtain physicians name, address, phone number, fax, and NPI or License number. Pay close attention to spelling.

The rest is the same as if there were a pending order in the ARV (follow steps from pending order)

From "Patient List" click on "Select" Check and confirm with patient to make sure the correct procedure is picked to be scheduled. Once procedure is identified then highlight it and click on "Search Wizard

Within the Search Wizard, you will want to follow the steps below:

Step 1: Select the patient's referring physician

Step 2: Fill out the Scheduling Questionnaire. You should fill this out for <u>every</u> patient. The top questions that are not under a modality are supposed to be filled out for every exam type. Then if the appointment has specific modality questions, then you will need to fill those out as well.

Step 3: Pick where the patient wants to come in for their exam

Step 4: Select the date range that you want to start searching on

Step 5: Select the Appointment Department and reason in the dropdown(s)

Step 6: Click the 'Search' button

Step 7: Highlight the time that the patient agrees on coming in

Step 8: Click the 'Set Appt' button



Rev. 2/14/18

VALLEY RADIO	LOGY CONSULTANTS					
Starting Date	STEP 4	Facility Group M	uti-Facity Filter B	Qear	Patient Name Tool. Aa-tool M (3018879 Eallient List)	ljew Appte
Start Time End Time 07:00 AM 09:00 PM	AM E PM	STEP 3	W UT		Referral Source	ast Ragged
Mon I Tue Ved	Thu P Fri P Sat P Sun	[None]				
[Any]	[None]	[Select Manually]		•	Patient Summary	
[Any] Appointment Book 1: [CT] 2: -Nones 3: -Okones 5: -Okones 5: -Okones 5: -Okones 6: -Okones 7: -Okones 8: -Okones 8: -Okones 8: -Okones 9: -Okones 8: -Okones 9: -Okones 9: -Okones 1: ELM_CT 3: ELM_CT	[Nanc] Research [2871CT ABDOMENV [(Select Manuality) VO CONTRAST Find Find	Day Log Minutes Alotted 0 0 0 30.0 0 0 0 - - 0 0 0 - - - 0 0 0 - - - - 0 0 0 - - - - - 0 0 0 -		Scheduling Questionnaire Resching Rades Image: Step 2 DOB: STEP 2 DOB: Home Phone: 999/999- DOB: Today and Future Appointments: Date Appointment Description 10/28/19 CT ABDOMEN WITHOUT CAP WITH Past Appointments: Date Date Appointment Description Account Created by/Date: CONV on 2017-10-01 Last Edited by/Date : EIS on 2017-10-27	STEP 1 AA-TEST M TEST MRN: 3018879 : 06/20/11 AGE: 6 yrs. SEX: M 9999 Daytime Phone: 999/999-9999 Cell Phone:
			STEP STEP 6 Search Leas Search <u>N</u> ees	8 Set Appt		

The Confirm appointment screen will then pop up. You can add any appointment notes, change the referring physician, or make the appointment a stat/asap.

Once everything has been filled out, click 'OK' to schedule the exam.

•	Арроі	ntment Red	quests for	TEST, AA-TEST	M	_ D X
Re	quest Status: [All]	Link Appt	<u>B</u> ooks View	Search Wizard	New Doc. Add Request	Edit Request
Due Date	Reason	D)ept	Req. Type	Req. Status	Work Step
09/18/2017	CT ABDOMEN W CONTRAST	T CT		SCMG	SCHEDULED	<u> </u>
09/20/2017	RF FACET INJ THORACIC	RF		Inbound Fax	SCHEDULED	New _
09/29/2017	CT ABDOMEN PELVIS WO/V	VCCT		SCMG	FINALIZED	Docked
09/29/2017	MR ABDOMEN PELVIS WO	COIMR		SCMG	CANCELLED	New
09/29/2017	CT ABDOMEN W CONTRAST	г ст		Inbound Fax	CANCELLED	New
10/02/2017	MG STEREO BREAST BX LE	FTMG		Inbound Fax	CANCELLED	Biopsy Callback
09/29/2017	CT ABDOMEN W WO MULTIF	PH/CT		Inbound Fax	CANCELLED	New
09/29/2017	CTANKLE WO CONTRAST	LT CT		Inbound Fax	CANCELLED	New
09/29/2017	MR ABDOMEN WO CONTRA	STMR		Inbound Fax	CANCELLED	New
09/29/2017	MG DIAGNOSTIC MAMMOGE	RAMG		Inbound Fax	CANCELLED	New
09/29/2017	US BREAST ULTRASOUND	BILUS		Inbound Fax	CANCELLED	New
10/04/2017	CTANKLE W CONTRAST RT	CT		Inbound Fax	SCHEDULED	New
10/06/2017	CR CERVICAL SPINE 2 OR 3	VICR		Inbound Fax	PENDING	Auto Attempt 1 -
10/20/2017	US THYROID US	US		Inbound Fax	SCHEDULED	New
10/23/2017	CT ADDL VIEWS CT	CT		Inbound Fax	CANCELLED	New
10/26/2017	CT ABDOMEN WO CONTRA	ST CT		Inbound Fax	SCHEDULED	New
10/26/2017	CT ABDOMEN WITHOUT CA	PVCT		Inbound Fax	SCHEDULED	New 🗾
						<u> </u>
	507.0					

If additional exams/appt. are needed using the existing order then double click on the pending order

Otherwise, once you are ready, click the 'Continue' button.

Multi-Part Appointment Request Selection [Test, Aa-test M - 3018879]												
Continue Cancel All Pending Requests For Patient												
	Appointment Book/Dept AT <none></none>			Reason					End. 🗿 🖈 🖡 1			
Selec S	TAT Due date	Work Step	Docs DO	B Re	q. ID	Dept		Reason		1	Request	
2	N 10/06/20	Auto Attempt	06/20	/20 726	C	R	CR CE	RVICA	SPINE			
•				A 6 A 0 1 1	4 4 4 5 5 5	444	* * *	# # # 8 8 8	4 4 4	建建设		
Request No	otes											
			~~	1110-01	anna i ann			- 110			1-121	

Once procedure is verified and confirmed then highlight the exam and click "Search Wizard'.