

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”

Patient's Insurance Information [Click on "Add Coverage"](#)

Insurance Carrier

SELF PAY (SELPAY00000001)

Ins. Plan Type: STANDARD

Employer

Coverage Level: Secondary Coverage Type: S - Selfpay Form: H1

Insured Information

First Name: BETTY Middle Name: Last Name: TEST Suffix: Pat. Relation: 1 - Self

Date of Birth: 03/03/1955 Address: 8851 CENTER DR STE. 3061 Address 2:

Gender: Male Female Undiff. City: LA MESA State/Province: CA Zip/Postal Code: 91942 Country: USA

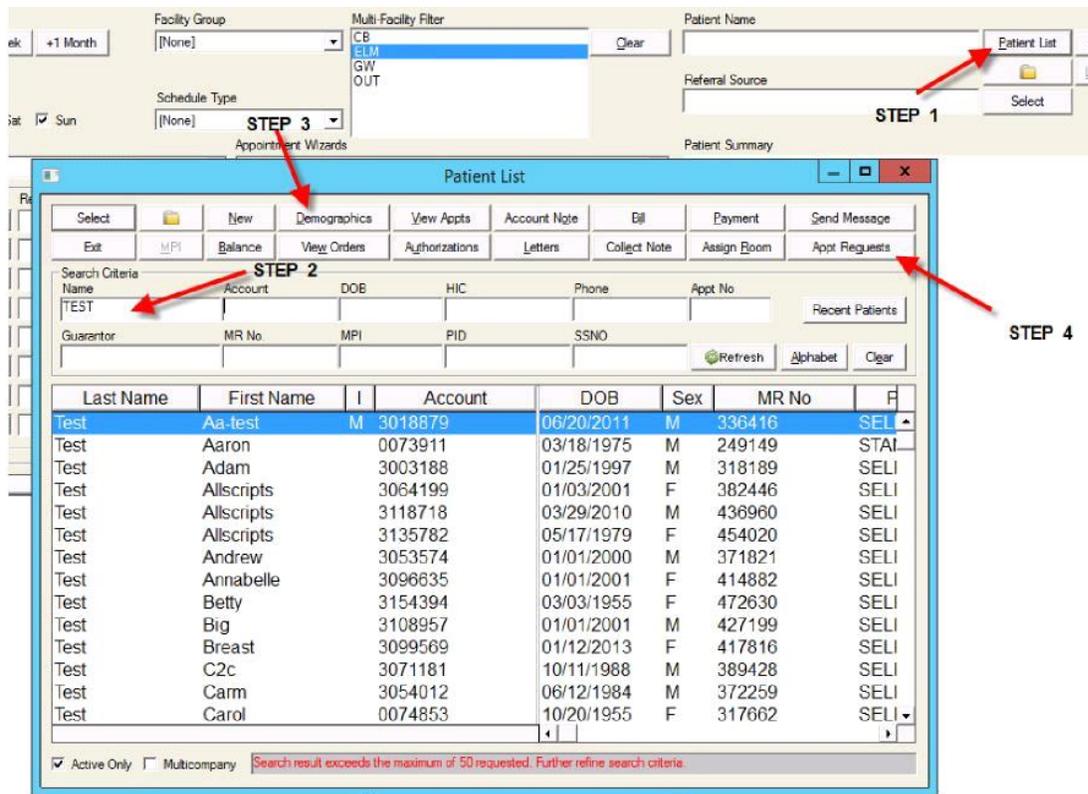
Insured Phone: 619/589-8628 Insured Group: Insured ID/HIC: 5 Special Info:

Insurance Plan: Member ID: Financial Responsibility Type:

MediMedia Payor:

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

Step 4: Click on Appt Requests button -



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.

Appointment Requests for TEST, BETTY

Exit Request Status: [All] Link Appt Books View Search Wizard View Doc. Add Request Edit Request

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	MR	Inbound Fax	PENDING	New	444			N
11/15/2017	CR ABDOMEN COMP ACUTE S	CR	Inbound Fax	PENDING	New	4794			N
11/29/2017	PET SKULL TO MID THIGH	CT	Inbound Fax	CANCELLED	New	5383			N
12/18/2017	PET SKULL TO MID THIGH	CT	Inbound 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

Save Save/Add Cancel H Request ID: 4794 Scan Document Attach Document Change Doc. Type X View Documents

Due Date: 11/15/2017 [15] Today +1 Week +1 Month

Patient Name: TEST, BETTY (3154394) Patient List

Referral: MISC, DOC (113464) Select

Request Status Request Type Workstep

Doc Description	Created	User	File Name

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.”

Appointment Requests for TEST, BETTY

Exit Request Status: [All] Link Appt Books View Search Wizard View Doc. Add Re

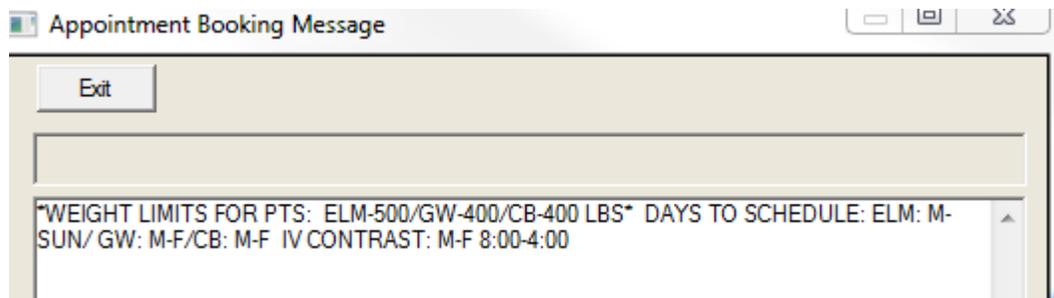
Due Date	Reason	Dept	Req. Type	Req. Status	Work Step	Docs	Re
09/25/2017	CT PET SCAN	CT	Inbound Fax	CANCELLED	New	15	
10/04/2017	MR CERVICAL SPINE WO CON	MR	Inbound Fax	PENDING		444	
11/15/2017	CR ABDOMEN COMP ACUTE S	CR	Inbound Fax	PENDING		4794	
11/29/2017	PET SKULL TO MID THIGH	CT	Inbound Fax	CANCELLED	New	5383	
12/18/2017	PET SKULL TO MID THIGH	CT	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.**
2. 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



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”



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.

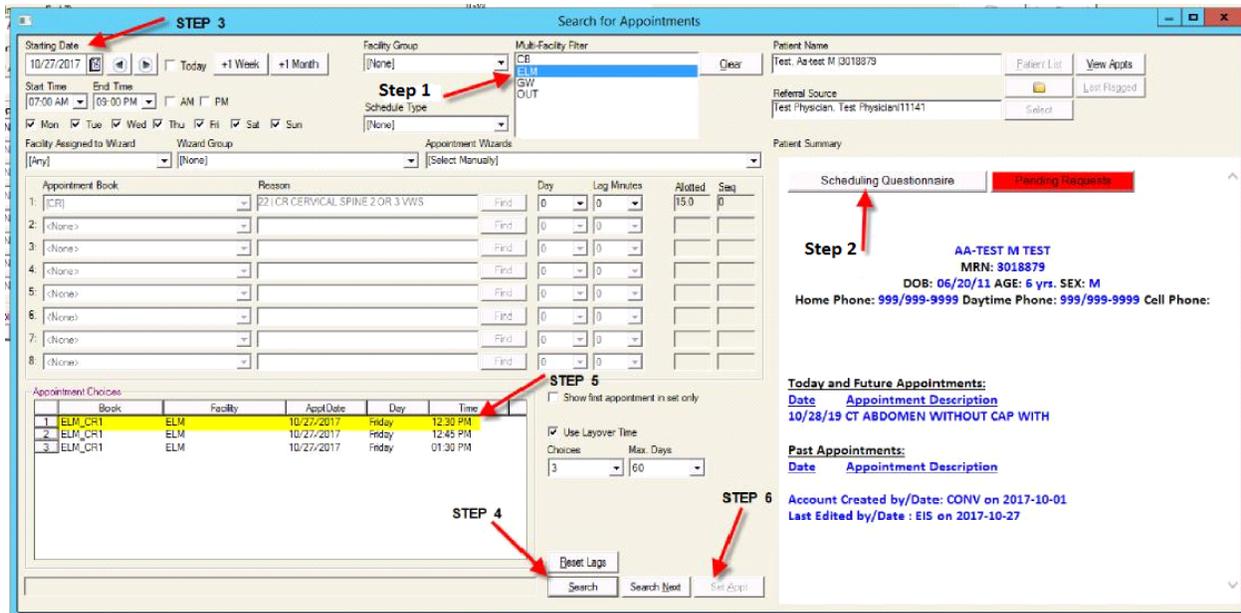
2: Click on Scheduling Questionnaire, “SCREENING QUESTIONNAIRE” window will open, then “Add new” to populate questions for different modalities. You should fill this out for **every** patient. The top questions that are not modality specific are suppose to be filled out for every exam type. Then if the 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



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.

- Convey instructions to the patient. Details such as Appointment instructions (date, check-in time and location, and length of exam).
- 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.
- Click on “Save to Chart” then click Exit.
- Scheduling Screen will pop open then Exit

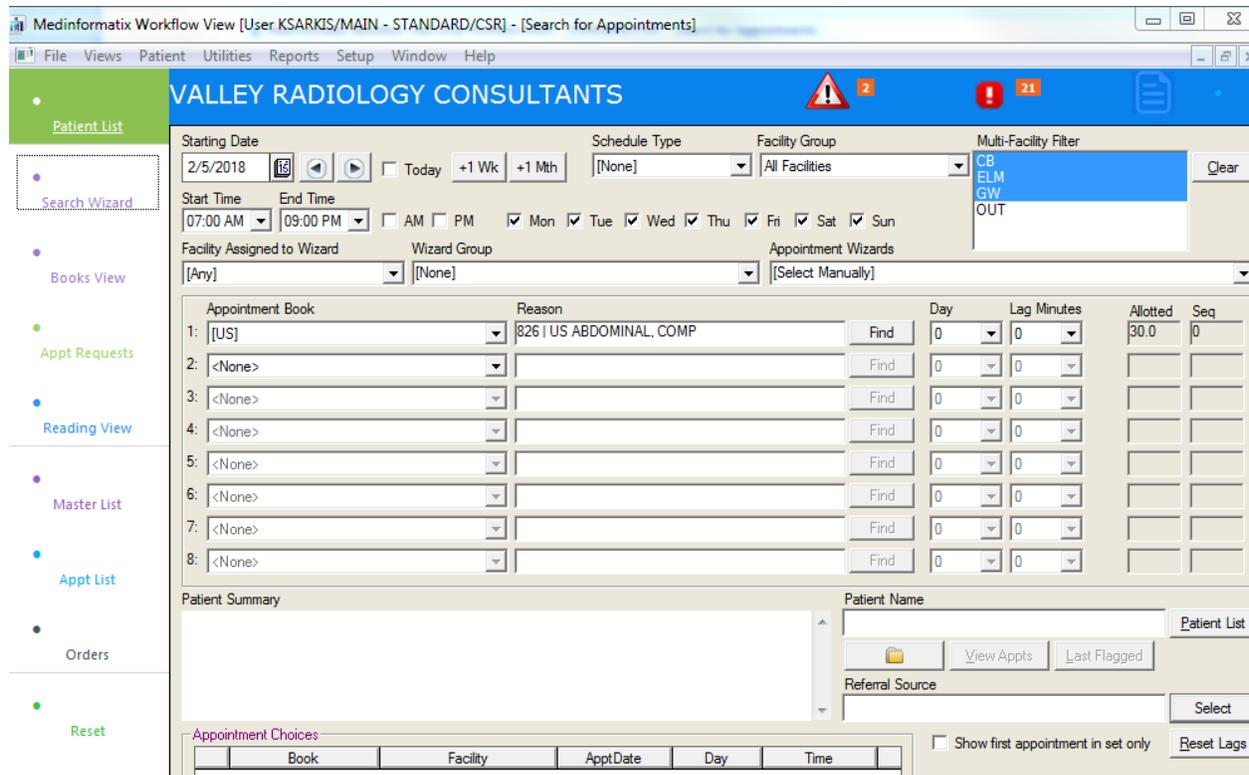
Confirm Appointment			
OK A		Cancel	Create One Time Authorization Appointment Note
Appointment Date: 10/27/17 Friday	A		
Patient will show up at: 12:30 PM			
Actual Book Appt Time: 12:30 PM			
Length of Appointment: 15.0 min.			
Reason: CR CERVICAL SPINE 2DR 3 VWS			
Patient: TEST, AA-TEST M (DOB: 06/20/2011) Book: ELM_CR1			
	v	Coverage Type IN - Heath	A
1 STAT	p.j.*	I None	A Referral Source IT Physician, Test Physician11141
Screening Questionnaire		I	es

	Referral Profile	I	Preferences	
	Name: TEST PHYSICIAN TEST PHYSICIAN Specialty: Unknown Address: None Tel#: None Fax#: 555/555-5		NM I	
I	CC Doctor Profile		Preferences	
	[No CC <u>Doctors</u> Entered _____		N/A	
Order Diagnosis Information				
I	Rank	I	Diagnosis	Description
	NIA		NIA	NIA
Order Procedure 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."



- 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 **every** 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

VALLEY RADIOLOGY CONSULTANTS

Starting Date: 10/27/2017 **STEP 4**

Facility Group: [None] **STEP 3**

Multi-Facility Filter: CB, E311, GW, OUT

Patient Name: Test, Aa test M 3018879

Referral Source: [Select] **STEP 1**

Patient Summary: AA-TEST M TEST, MRN: 3018879, DOB: 06/20/11, AGE: 6 yrs, SEX: M, Home Phone: 999/999-9999, Daytime Phone: 999/999-9999, Cell Phone: [None]

Appointment Book:

1.	Book	Reason	Day	Lag Minutes	Allotted	Seq
1.	[CT]	287 CT ABDOMEN WO CONTRAST	Find	0	30.0	0
2.	<None>		Find	0		
3.	<None>		Find	0		
4.	<None>		Find	0		
5.	<None>		Find	0		
6.	<None>		Find	0		
7.	<None>		Find	0		
8.	<None>		Find	0		

STEP 5

Appointment Choices:

1.	Book	Facility	Appt Date	Day	Time
1.	ELM_CT	ELM	11/07/2017	Tuesday	05:00 PM
2.	ELM_CT	ELM	11/07/2017	Tuesday	05:15 PM
3.	ELM_CT	ELM	11/07/2017	Tuesday	05:30 PM

STEP 7

Use Layover Time: Choices: 3, Max Days: 60

STEP 6 (Set Lags) **STEP 8** (Set Appt)

Buttons: Search, Search Next, 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.

Due Date	Reason	Dept	Req. Type	Req. Status	Work Step
09/18/2017	CT ABDOMEN W CONTRAST	CT	SCMG	SCHEDULED	
09/20/2017	RF FACET INJ THORACIC	RF	Inbound Fax	SCHEDULED	New
09/29/2017	CT ABDOMEN PELVIS W/O W C CT		SCMG	FINALIZED	Docked
09/29/2017	MR ABDOMEN PELVIS WO COIMR		SCMG	CANCELLED	New
09/29/2017	CT ABDOMEN W CONTRAST	CT	Inbound Fax	CANCELLED	New
10/02/2017	MG STEREO BREAST BX LEFTMG		Inbound Fax	CANCELLED	Biopsy Callback
09/29/2017	CT ABDOMEN W WO MULTIPH/CT		Inbound Fax	CANCELLED	New
09/29/2017	CT ANKLE WO CONTRAST LT CT	CT	Inbound Fax	CANCELLED	New
09/29/2017	MR ABDOMEN WO CONTRAST MR		Inbound Fax	CANCELLED	New
09/29/2017	MG DIAGNOSTIC MAMMOGRAMMG		Inbound Fax	CANCELLED	New
09/29/2017	US BREAST ULTRASOUND BILUS		Inbound Fax	CANCELLED	New
10/04/2017	CT ANKLE W CONTRAST RT CT	CT	Inbound Fax	SCHEDULED	New
10/06/2017	CR CERVICAL SPINE 2 OR 3 V1 CR	CR	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 CONTRAST CT	CT	Inbound Fax	SCHEDULED	New
10/26/2017	CT ABDOMEN WITHOUT CAP VCT		Inbound Fax	SCHEDULED	New

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.

Select	STAT	Due date	Work Step	Docs	DOB	Req ID	Dept	Reason	Request
<input checked="" type="checkbox"/>	N	10/06/20	Auto Attempt		06/20/20	726	CR	CR CERVICAL SPINE	

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