SELF-GUIDED PRACTICE WORKBOOK [N81] CST Transformational Learning

WORKBOOK TITLE: RadNet- Clerk (MI Clerk / MI Supervisor)







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SELF-GUIDED PRACTICE WORKBOOK

Duration	8 hours				
Before getting started	 Sign the attendance roster (this will ensure you get paid to attend the session). Put your cell phones on silent mode. 				
Session Expectations	 This is an instructor led learning session. The workbook provides different scenarios that are applicable to your daily workflow. Each scenario will allow you to work through different learning activities at your own pace. 				
Key Learning Review	 At the end of the session, you will be required to complete a Key Learning Review. This will involve completion of specific activities that you will have had the opportunity to practice through in the scenarios. 				

Introduction

Welcome to the Medical Imaging classroom session. This workbook contains scenarios meant to mimic the functionalities used in your daily practice. This workbook is designed to introduce you to a variety of Cerner system functionalities. While working through this workbook, you may find yourself completing tasks that are not be specific to your role, however all tasks are designed to cover key functionalities of the system that you can apply to your own work.



Using Train Domain

You will be using the train domain to complete activities in this workbook. It has been designed to match the actual Clinical Information System (CIS) as closely as possible.

Please note:

- Scenarios and activities are designed to demonstrate CIS functionality and may not reflect exact workflows.
- Some clinical scenario details have been simplified for training purposes.
- Some screenshots may not be identical to what is seen on your screen and should be used for reference purposes only.
- **Follow all of the steps outlined** to be able to complete activities.
- If you have any trouble, please raise your hand for assistance immediately in order to use classroom time effectively.



PATIENT SCENARIO 1

Learning Objectives

At the end of this Scenario, you will be able to:

- Access the patient and encounter details in PowerChart
- Register patients using Department Order Entry (DOE)
- Use DOE to create an order and activate future orders
- Modify, replace and cancel orders at Radiologist's request in RadNet
- Check allergies and add notes to an order

SCENARIO

This first part of the course is a step by step guided introduction to PowerChart and RadNet. You will be asked to accomplish a variety of tasks that are part of your daily workflow, and you will be guided through them. Follow the guidelines included to move through the scenario.



Activity 1.1 - PowerChart - The Patient's Electronic Health Record

1 When you start your shift, you will be using a device to log onto the computer called **Tap n' Go**. This will either look like a black device resting near your keyboard or it will be plugged into a USB port on the side of your Workstation on Wheels (WOW). You must log into your workstation at the beginning of your shift using your password; the rest of the day you will be able to tap your Photo ID card to log in and out.

After you log in, your name will display at the top right hand corner of your screen. This is important to note as you <u>must not</u> use anyone else's login for privacy and security reasons. In the top left corner of your screen you will see the Launchpad and a variety of apps you will use in your day to day documentation of patient care. You can also click into the Launchpad where you will see the Citrix StoreFront.

Citrix StoreFront			
			Q Search Desktops
Details Online Work List	Exam Management	Details Department Order Entry	Details Order Viewer
Details Scheduling Appointment Book	Details PowerChart		

This is where you will access the same RadNet applications as displayed on your top toolbar. Applications include PowerChart (for accessing the patient chart), the Online Work List, and Department Order Entry etc. where you will be doing the majority of your work. You should only have one of each application open at a time. Having more may cause errors in your work.

2 **PowerChart** is the main patient record where all clinical information is stored.

Access Patient Charts using the **PowerChart** Icon in Store Front. As soon as you open PowerChart, your landing page will be the **Ambulatory Organizer**. Ambulatory Organizer shows booked appointments for a selected resource. Resources are organized by hospital, departments, clinics and rooms. Depending on the resource selected, the Organizer will display the booked appointments and statuses for that day or week.

If you have moved onto other areas of the patient chart, you can always return to the Ambulatory

Organizer by selecting the sel



P	PowerChart Organizer for Train, Clerk-RadNet1 – 🗖 🗙
Task Edit View Patient	Chart Links Navigation Help
🗄 🎬 Ambulatory Organizer 🔸	Patient List 🚨 Multi-Patient Task List 🎬 CIS Help 🖕 🤅 😋 CareConnect 🤤
🗄 📶 Exit ं AdHoc 🍰 PM Cor	iversation 👻 🕂 Add 👻 🛅 Documents 🚆 Scheduling Appointment Book 👘 🊆
🔅 😋 Patient Health Education M	aterials 🜊 SHOP Guidelines and DSTs 🜊 UpToDate 🝦
	MICLERKONE, AARON 👻 🌾 Recent 🗸 Name 🔷 🔍
Ambulatory Organizer	[므] Full screen 🖷 Print 💸 52 minutes ago
A 1 10	0% 🔹 🕒 🚰
Ambulatory Organizer	
Day View (6) Calen	dar Open Items (0)
September 25, 20	118 Patients for: LGH CT Rm 1 -

3 Since this is the first time the Ambulatory Organizer has been accessed, no patient information will display until a resource location has been selected. The screen will look similar to this and be defaulted into the Day View. Once this has been set up, the location will be defaulted each time you log in.

	@ Recent - Name	- م
Ambulatory Organizer	[므] Full screen 👘 Print	€ 8 minutes ago
🏔 🐚 📥 🖿 🔍 🔍 100%	- 😋 🔲 🗳	
Ambulatory Organizer		
Day View Calendar	Open Items (0)	
 August 8, 2018 	Patients for: No Resource Selected -	
	A Drivert Found	٢
	No Patients Found	

To view the exam appointment schedule of one or more locations:

- 1. Select the drop-down arrow beside No Resource Selected
- 2. Click in the search field and begin typing LGH CT (you will use your modality in your work)
- 3. Scroll through the list and select the name LGH CT Rm 1 from the Add Other section
- 4. Select **Apply** to display the schedule.



Patients for: No Resource Selected 👻 🚹
LGH CT 2
LGH CT Oral Contrast Prep Resource
LGH CT Radiologist
□ LGH CT Rm 1 3
L LGH CT Rm 2

The appointments booked for today will now populate. You can also see future or past appointments by changing the date on the calendar.

The color status on the left side of the booked appointment slot and calendar assists you to understand the flow of the clinic. The status of a patient will update based on documentation completed by a clerk, technologist, nurse, or provider.

Color Status	Definition
	Light blue indicates a confirmed appointment.
	Medium blue indicates a checked in appointment.
	Green indicates seen by nurse, medical student, Tech, Allied Health or custom status.
	Orange indicates a seen by physician, mid-level provider, resident, or custom status.
	Dark grey indicates the appointment has been checked out.
	White indicates a no show, hold, or canceled appointment (these appointment types are displayed if the system administrator has configured them to display).



Appointment details are displayed in columns that can be sorted by selecting the column header.

Day View(1	1) Cal	lendar Open Item	is (0) atients for: LGH CT R	.m 2 🔻					
Time	Duration	Patient	Details	Status	Notes	۲	ŀ	August 8, 2018	
△ Clinic - LGH Med Imaging								Wednesday	
7:30 AM	30 mins	MITECH, WILLIAM 79 Years, Male	CT Inpatient	Confirmed	Chief Complaint: P.		11 am	CT Interventional MITECH, JASON CT Interventional MITECH, CARLT CT Interventional MITECH, CARLT	^
8:00 AM	30 mins	MITECH, ENRIQUE 79 Years, Male	CT Inpatient	Confirmed	Chief Complaint: p.		12 pm	CT Interventional MITECH, JAKE CT Interventional MITECH, GUILL CT Interventional CT Interventional	
8:30 AM	30 mins	MITECH, ROBERTO 79 Years, Male	CT Inpatient	Confirmed	Chief Complaint: P.		2 pm	CT Interventional CT Interventional	
9:00 AM	30 mins	MITECH, BRETT 79 Years, Male	CT Inpatient	Confirmed	Chief Complaint: p.		3 pm	CT Interventional CT Interventional CT Interventional	
9:30 AM	30 mins	MITECH, NOEL 79 Years, Male	CT Inpatient	Confirmed	Chief Complaint: P.		4 pm	MI Block	
10:00 AM	30 mins	MITECH, GLEN	CT Inpatient	Confirmed	🕌 Chief Complaint: p.	~	5 pm		~

Click the patient's name to enter their clinical record. Ensure you select the patient on your training card.



4

NOTE: This is only one way to access a patient's record, and does not necessarily reflect the MI workflow of all departments.

Chart Familiarity

In the Application Toolbar (shown below and reflected on your screen) you will see different icons that will be relevant throughout the workbook and in practice.

Locate the **PHSA PACs** and **VCH and PHC PACS** and **CareConnect** buttons where you will be able to view previous or recently completed images, reports and documentation.



Locate the other applications **Scheduling Appointment Book**, **PM Conversation** and the **Medication Administration (MAW)**.

Task Edit View Patient	Chart Links Navigat	ion Help			
🗄 🎬 Ambulatory Organizer 🛔 P	atient List 🔉 Multi-Patio	ent Task List 📲 CIS Help	🚽 🕴 🕄 CareConnect 🔍 PHSA PA	CS 🔍 VCH and PHC PACS	🜊 FormFast WFI 🝦
🗄 🎞 Tear Off 🚽 Exit ष AdHoo	🚨 PM Conversation 👻	🕂 Add 👻 🖻 Documents	🖀 Scheduling Appointment Book 🛛	Discern Reporting Portal	😨 Patient Locator 🖕
2 Ratient Health Education Ma	aterials 🔃 SHOP Guidelii	nes and DSTs 🕄 UpToDat	e _		



Below the grey Application Toolbar, is the **Patient Banner Bar**. This toolbar displays your patient's demographic data, alerts, their location, and current encounter.

0 1	, ,	,					
VALIDATE, MICLERKONE					List	Recent + Name	- 9
VALIDATE, MICLERKONE	DOB:13-Aug-1938	MRN:760002019	Code Status:Attempt CPR, Full Code 26-Jul-	Process:Falls Risk	Locat	ion:LGH 6E; 6EL; 03	
	Age:80 years	Enc:760000002019		Disease:	Enc Ty	/pe:Inpatient; Active	
Allergies: Peanuts	Gender:Male	PHN:9860002019	Dosing Wt:80 kg	Isolation:	Attend	ding:Train, GeneralMedicine-Phy:	sicia

Under the Patient Banner Bar, the patient's chart will default open to the **Imaging Technologist View** in the menu bar. There are various tabs to the right such as Imaging Synopsis which gives an overview of the most recent results for that patient. There are several tabs designed to support specific workflows. Click each **tab** to see the differences.

Menu [‡]	< 🖂 🔸 🚹 Imaging	General					jî	🗅 Full screen 🛛 🗍	rint 🛛 🏖 3 minutes a	ago
Imaging General	A	100% - 🖉 🜑 🟠								
Appointments	Imaging Synopsis	🔀 🛛 Future Orders		XX +						
Results Review							_			
Orders 🕂 Add	Patient Information	≣∙⊙	Allergies (1) 💠			≣∙⊗	Clinical Research	i (0)	≡• ⊙	~
Patient Information	Chief Complaint:	Productive cough and fever	All Visits				Documonts (1)		=- 0	
	Reason For Visit:	An 80 year old male	Peanuts	Hive	es		All Market		@	
Allergies		presents to the ED with fever and productive courds					All VISIts 🔻			
CareConnect	Primary Physician:	Train, GeneralMedicine-	Measurements ar	nd Weights	(2)	=• 🔊	My Documents			
Chaired Bassach		Physician17, MD	All Visits				Note Type	Author	Date/Time	
	Attending Physician:	Train, GeneralMedicine-		Latest within	Previous within	Change	General Medicine	TestUser, ConoralModicino	24/09/18	
Diagnoses and Problems	Admitting Physician:	Physician1/, MD Test Iser, GeneralMedicine-	Height/Length	180 cm			Progress Note	Physician, MD	13.39	
Form Browser	Admitting Physician.	Physician, MD	Measured	29 hrs						
Histories	Service:	General Internal Medicine	Weight Dosing	80 kg			Medications		= - 📀	
MAR Summary	Room/Bed:	6EL-03		29 hrs			Selected visit			
Single Patient Task List	Admit Date: Targeted Discharge Date:	23/0//18 No results found	Labs			=- 🔿	⊿ Scheduled (0) Nex	t 12 hours		
	Advance Directive:	No results found	Last 90 days for all vi	eite 👝			∠ Continuous (0)			
	Last Visit:	No results found	Last 90 days for all vi	5165 🗸			△ PRN/Unscheduled	Available (0) Last 48	hours	
	Code Status:	Attempt CPR, Full Code		Today within	Previo within	us n	Administered (0) L	ast 24 hours		
	△ Diet and Activity (2)		⊿ Primary Labs (3)				Discontinued (0) La	ast 24 hours		
	Diet General	26-Jul-2018 13:40 PDT	Urea		2.0	6.7			,	~
	Activity as rolerated	20-JUI-2018 13:40 PD1			26 hrs	27 hrs	Home Medication	ns (0)	≡•⊗	

There is a Refresh icon in the top right corner ^{2 2 minutes ago}. This is because the chart can be worked on simultaneously by multiple clinicians; each page must be refreshed separately. Click the **refresh** icon **2** to ensure that your display is up-to-date. **Refresh frequently**.

View Results

5

To see a report for a required laboratory result, click **Labs** in the header which will open the **Results Review** section of the chart.

Labs			=- @
Last 90 d all vis	its 🔻		
	Today within	Prev wit	rious hin
⊿ Primary Labs (3)			
Urea	2.0 6 hrs	6.7 7 hrs	- ^
Glomerular Filtration Rate Estimated	114 6 hrs	48 7 hrs	
WBC Count	10.3 7 hrs		
⊿ Laboratory (42)			
WBC Count	10.3 7 hrs		
RBC Count	• 4.12 7 hrs		
Hemoglobin	120 7 hrs		
Hematocrit	• 0.36		

Locate any lab result, and double-click on the result number in the **cell** to view the result details.



P F	Result Details - VALIDATE, MITEC	CH - CBC	- • ×
Result H	istory		
Value	Valid From Valid Until		
10.3	08-Aug-2018 07:30 PDT Current		
Result	Action List		_
WBC Co	ount 10.3 (HI)		
Normal	Low 3.9 Normal High 10.2		
Date/Tir	me WEDNESDAY, 08-AUGUST-2018	07:30 PDT	
Contrib	utor System TRAINDB_SYS		
Accessio	on Number T2015		
Status	AUTH (VERIFIED)		
Trend			2
219396152	!	Forward	Close

6 Future Orders

Providers can place orders for future exams that are non-schedulable (e.g. XR Chest) in PowerChart. These orders will display in the **Future Orders** tab (all other modalities will be scheduled and will NOT be activated from this tab).Click the **Home** button to go back to the landing page in your patient's chart.

- 1. Select Imaging Technologist from the Menu bar on the right
- 2. Select the Future Orders tab. Orders are listed by specialty.
- 3. Access the **Rad** (Radiology) orders and explore the information available here.
- 4. Search back over 4 months or more if no orders appears.





7 You are able to review results from previously completed exams on the patient.

- 1. In the left hand Menu, select Results Review. The results tabs will open.
- 2. Click on Diagnostics tab to access Medical Imaging results.
- 3. Double-click on the CT to review the exam report.
- 4. The Document Viewer window will open with the results. Review the final report using the scroll bar.
- 5. Click Close (X) when done.

Menu [‡]	< > 🔸 👘 Results Review						
Imaging Technologist							
Interactive View and I&O							
MAR	Recent Results Advance Care Planning Lab - Recent Lab - Extended Pathology Microbiology Cultures Microbiology Other Transfusion Diagnostics 2 Recent Vitals - Extended						
Results Review	Flowsheet: Diagnostics View v Table O Group O List						
Medication List	Caturday, 09 August 2015 14:25 DDT, Thursday, 09 August 2010 14:25 DDT, (Taired						
Orders + Add	אריין ארי אריין אריין אריי						
Single Patient Task List	Navigator Show more results						
Allergies 🕂 Add	Computed Longstephy Diagnostics View 08-Aug-2018 14:02 PDT						
Appointments	Computed Tomography Computed Tomography Cf Dest Abdo Balis w/ Contract						
CareConnect	Diagnosti Kadiology						
Clinical Recearch	XR Chest XR Chest *						
P	Document Viewer - VALIDATE, MITECH - 760002014						
왜 🛍 🔊 🛲 🗙 🗶							
	* Final Report *						
Reason For Exam							
pain							
Report							
EXAM TYPE:							
CT Chest Abdo Pelvis w/ Cont	rast						
HISTORY:							
Trauma, MV A							
COMPARISON:							
No previous imaging to compar	re						
FINDINGS:							
tissue abnormalities ; pelvis bla	contrast, rindings cinest, normal ex am no evidence of no tractures; abdomen normal abdominal contents no visible soft dider unremarkable no fractures of the bony margins of the pelvic rim						
IN URDER STON							
CT chest abdomen pelvis with	contrast normal findings no evidence of fractures or trauma						
Signature Line							
***** Final *****							
Dictated DT/TM: 01-AUG-201	18 06:00						
Signed by: Dr.SYSTEM, SYST	TEM Cerner						
Signed (Electronic Signature):	01-AUG-2018 06:00						
	L						

8

View Orders

You can view all orders for the patient by clicking the **Orders** button on your menu bar. Adjustments to the settings may be required to view all of the active orders and discontinued orders that have been placed on the patient's encounter.

- 1. Select **Display: All Active Orders** and ensure that under Advanced Filters, all the boxes are selected as below.
- 2. Click **Apply** and then close the window.





NOTE: You must be in the correct encounter to see the active and completed orders.

9 View Previous Imaging and Other Results

You can view images from previous exams in VCH and PHC PACS, PHSA PACS and check results from other acute settings in **CareConnect** from the main toolbar. You will have to search for the patient using their PHN.



The CareConnect button in the menu will open in patient context in the CareConnect viewer.

Menu	,
Imaging General	
Appointments	
Results Review	
Orders	🕈 Add
Patient Information	
Alleraies	
CareConnect	
Clinical Research	



10 MAR Summary

Review any medications a patient may be taking. If the patient you are viewing has an outpatient encounter, there may not be any medications available to view.

- 1. Click on the MAR summary from the menu.
- 2. Any scheduled medications for the patient will be visible.
- 3. Filter your search and explore the options in the drop-down menu.

Menu	.	< 🖂 👻 👫 MAR S	< 🔉 👻 者 MAR Summary					een (
Imaging General		All Medications	(System)	×	A reday,	18-Septem	ber-2018 00	00 - Tue
Appointments			., ,		3			
Results Review		 Show All Rate Change 	Show All Rate Change Documentation					
Orders •	🕈 Add	Time View	25-Sep-2018 0000 - 2359	24-Sep-2018 0000 - 2359	23-Sep-2018 0000 - 2359	22-Sep-2018 0000 - 2359	21-Sep-2018 0000 - 2359	20-Sep- 0000 - 1
Patient Information		PRN						
		acetaminophen	PRN					
Allergies		650 mg, PO, q4h, PRN						
CareConnect		form: tab, start: 26-Jul-20						
Clinical Research		dimenhyDRINATE	PRN					
Diagnoses and Problems		(dimenhyDRINATE PRN range dose)						
Form Browser		dose range: 25 to 50 mg,						
Histories			2					
MAR Summary								
Single Patient Task List	1_							

11

Click the **CIS Help** icon in the grey toolbar. Here, you can access all the Medical Imaging and Registration workbooks as well as Help Topics that go over education that may not be in the workbooks. If you have any questions about the CIS, access resources here first.

NOTE: You can also access CIS Help from your StoreFront

CIS Help			(D) Full scree	n 👘 🧟 0 minutes ag	
AA B 40 B 4, 4, 100% · 60 6 🛆					
eCoach Learnin	gLIVE			1	
CLICK A LINK BELOW TO GO TO CIS HELP > Not return results	e the Search on this screen does not	All Users 🗸	Additional Resources 🗸	Tech Support Q	
Click to Go To CIS Help	EMERGENCY	View All	MATERNITY	View All	
	Emergency		Maternity		
or click a Specialty link	Emergency * TEST		Add a Pregancy TEST		
1000 C	CIS Help JIRA TEST		MENTAL HEALTH	View At	
	INPATIENT MEDICAL AND SURGE	View All	Mental Health		
CLINICAL SUPPORT SERVICES VIEW All	Inpatient Medical & Surgical		AMBULATORY	View All	
Medical Imaging	CRITICAL CARE	View All	Ambulatory		
Laboratory	Critical Care		ONCOLOGY	View At	
PHARMACY View All	SURGERY & ANESTHESIA	View All	Oncology		



Activity 1.2 – Register a Patient and Place an Order Using Department Order Entry (DOE)

RadNet is where you will spend most of your working hours. This application will allow you to complete the daily tasks in your department. For further education regarding RadNet, please complete the Learning Hub e-learning module. This will review the main functionalities of RadNet including: **Department Order Entry (DOE)**, **Online Work List**, **Exam Management**, **Scheduling Appointment Book** and **Order Viewer**.

A patient needs to be registered in the Clinical Information System in order to have clinical procedures performed. Each order or clinical procedure needs to be attached to an encounter (formally known as the account number); either a Current Encounter or a New Encounter. A patient can have more than one encounter open at a time; this is why it is important to choose the correct encounter when you work with a patient. You can place multiple orders on the same encounter.

Department Order Entry (DOE) will primarily be where you create orders for an outpatient who requires an exam.

In this scenario, your outpatient arrives with a requisition from their GP for an ankle X-ray. You will **Register** them with a **New Encounter** and place an order for **XR Ankle Right**.





1

Open **DOE** from Storefront by clicking on the icon. Once in the application:

- 1. First select the **Client** (1) which you will select from the drop-down menu. In this scenario, select **LGH Medical Imaging** (2). **Note**: this will be your site's Medical Imaging area.
- 2. You will then select the **Person Name.** It is a registration best practice to open your patient via the Person Search. Click on the **Magnifying Glass** (3). The Person Search will open and you can now search for your patient. Please use the same patient from the first activity.

E	Department Order Entry - Order Entry				
Task Edit View Order Customize Help	Department Order Entry - C	Loc: Admitting:	Attending:		
LGH North Shore Hospice LGH OCC Medical Daycare LGH OCC Universal Clinic	DOB:	Admitted:			



2 Add an Encounter

The Encounter Search window will open. Search for your patient using their Last Name and First Name.

NOTE: In your work, you will search for patient using their MRN or PHN first. If you do not find your patient, you can search by their Last Name, First Name and Date of Birth. For more information on this and how to create a New Registration, please refer to your Registration classroom training.

- 1. After clicking **Search**, your patient will be viewable in the top box. Select your **patient** to highlight it in blue. Their list of the patient's encounters will open in the box below.
- 2. Next click **Add Encounter**. (If you clicked on an encounter the patient already has, the order would be added to that encounter.) You will see the Organization Box open.

<u>3</u>		Encour	nter Search						×
BC PHN:	MD Decent /	ne ne		N	DO.	in /	<u>,</u>	Canal	- Add
	g F	Process Alert 986	60002014 760002	014 VALIE	ATE, MITECH 13	Aug-1938 11:36 7	79 Years	Male	201
MRN:									1
Last Name:									
validate									
First Name:									
mitech									
13-Aug-1938									
Gender:									
v									
Postal/Zip Code:	1								
Any Phone Number:	Facility	Encounter #	Visit #	Enc Type	Med Service	Unit/Clinic	Room	Bed	Est Am
Encountry #	39 LGH LIONS Gate	760000002014	760000002014	Inpatient	General Internal Me	edicine LuH 6E	6EL	02	
Encounter #:									
Visit #:									
Historical MRN:									
<u>S</u> earch <u>R</u> eset									
MPI Search									
	<								>
					1	4			
			UK	Cancel	Preview	Add Person	A	dd <u>E</u> nco	bunter



3. Select LGH Medical Imaging and click OK.

Organization ×					
Please select the facility where you want to view person aliases.					
Facility Name Facility Alias					
LGH Med Imaging					
Facility:					
LGH Med Imaging					
OK Cancel					

NOTE: Warning pop-ups may alert you that your patient has an active encounter. Because DOE is primarily for walk-in patients, you likely will be creating a new encounter for their exam.

3 The Register Outpatient box will open. You will see various tabs to review and input information.

ALERTS Patient Information Encounter Information Insurance Insurance Summary Additional Contacts

All mandatory fields are highlighted in yellow.

Complete all yellow fields with the following patient information:

- 1. Review and ensure information under the **Patient Information** tab is correct.
- 2. Under the Encounter Information tab
 - a) **Encounter Type =** *Outpatient*
 - b) Medical Service = Medical Imaging
 - c) Reason for Visit = X-Ray
 - d) Source of ID = BC Services Card with Photo
 - e) PCP Verified? = Yes
 - f) Referring Provider = Kroll, Edward Steve
- 3. Under the Insurance tab
 - a) Status in Canada = Insured Resident
 - b) Accident Related Visit? = No
 - c) Search for Health Plan button, type in MSP ... Then select see card British Columbia
- 4. Click **Complete**, once the information is entered. If there are any required fields not complete, it will move your cursor to what is missing. You are required to complete any missing information before moving to the next step.



1	Register Outpatient – 🗖						
1							
fedical Record Number:	Encounter Number:	Last Name:	First Name:	Middle Name:		Preferred Name:	
60002014		VALIDATE	MITECH				
revious Last Name:	Maiden Name:	Date of Birth:	Age:	Gender:		BC PHN:	
/alidate		13-Aug-1938	79Y	Male	~	9860002014	
Images ALERTS Patient Information	on Encounter Information Insuran	ce Insurance Summary Addition	nal Contacts				
Images ALERTS Patient Informatie Encounter Type: Dutratient	Medical Service:	ce Insurance Summary Addition	nal Contacts Referral Source:	Arrival by Ambulance:	So	ource of ID:	
Images ALERTS Patient Informati Encounter Type: Outpatient	on Encounter Information Insuran Medical Service:	ce Insurance Summary Addition Reason for Visit: V X-ray	nal Contacts Referral Source:	Arrival by Ambulance:	So V B	ource of ID: IC Services Card With V	
Images ALERTS Patient Informati Encounter Type: Outpatient Location Facility	on Encounter Information Insuran Medical Service: Medical Imaging Building:	ce Insurance Summary Addition	Referral Source:	Arrival by Ambulance:	So Bi	ource of ID: C Services Card With V	
Images ALERTS Patient Informati Encounter Type: Outpatient Location Facility: LGH Med Imaging	Medical Service: Medical Imaging Building: IGH Med Imaging	ce Insurance Summary Addition Reason for Visit: X-ray Unit/Clinic: LGH Med Imaging v	Referral Source:	Arrival by Ambulance:	v B	ource of ID: IC Services Card With v olation Precautions:	
Images ALERTS Patient Informati Encounter Type: Outpatient Location Facility: LGH Med Imaging Care Providers	on Encounter Information Insuran Medical Service: Medical Imaging Building:	ce Insurance Summary Addition Reason for Visit: Xray Unit/Clinic: LGH Med Imaging v	Referral Source:	Arrival by Ambulance:	So Bi	ource of ID: IC Services Card With v olation Precautions:	
Images ALERTS Patient Informati Encounter Type: Outpatient Location Facility: LGH Med Imaging Care Providers Attending Provider:	on Encounter Information Insuran Medical Service: Medical Imaging Building: LGH Med Imaging Primary Care Provider (PCP):	ce Insurance Summary Addition Reason for Visit: Xray Unit/Clinic: LGH Med Imaging PCP Verified?:	Referral Source:	Arrival by Ambulance:	v B	ource of ID: IC Services Card With v olation Precautions:	

ALERTS Patient Information Encounter Information Insurance Insurance Summary Additional Contacts
MSP Eligibility Verify Date: Verify Time: Not Checked 08-Aug-2018 ↓ 14:49 ↓
Inquire if patient has proof of other Provincial or Federal health insurance coverage (if YES, select Insured Resident) Status in Canada: Insured Resident v UNINSURED Residency Information
Accident/Injury Information Accident Related Visit?:
PRIMARY INSURANCE
Self v Search for Health Plan

4

A pop-up window with the Encounter number and visit identification number will appear. Click OK.





Create an Order

5

The Department Entry – Order Entry which remained opened in the background is now populated with your patient information. Identify the **Orderable** section and type in the order you want to place: *XR Ankle Right* and press the **Enter** button on your keyboard. After your selection, the information for this order will populate below.



NOTE: If the search cannot find your order or you want to explore other orders, you can also click the **Magnifying Glass** to see all order options available. For example, if you type *XR* and click the **magnifying glass**, all XR orders will populate.

Orderable: XR Ankle Right				
* Requested Start Date/Time:	* Priority:	* Reason for Exam:	Special Instructions / Notes to Sc	Provider Callback Number:
20-Jul-2018 🗘 🗸 1054 🌲	Routine v			
Pregnant:	Transport Mode:	Performing location:	Special Handling:	If Portable, specify reason:
	•	•		· · · · ·
Other Reason for Portable:	Request Received Date/Time:	CC Provider 1: (Name)	CC Provider 2: (Name)	CC Provider 3: (Name)
	······································	``	<u></u>	
CC Provider 4: (Name)	CC Provider 5: (Name)	* Ordering Physician: (Name)	* Order Date/Time:	* Order Communication Type: Y
				Add Submit



NOTE: If the order doesn't move into the working space, double-click the order.

6 Complete the mandatory information shown in yellow.

- 1. Reason for Exam = slip and fall.
- 2. Ordering Physician (Name)= Kroll, Edward Steve, MD
- 3. Click Add

NOTE: If a patient requires multiple orders, keep entering the subsequent exams into the orderable and click Add. Once all orders are in the Ordered area, you can move to the next step.

* Requested Start Date/Time: 08-Auq-2018	*Priority: Routine v	* Reason for Exam: slip and fall	Special Instructions / Notes to Sc	Pregnant.
Transport Mode:	Performing location:	Special Handling:	If Portable, specify reason:	Request Received Date/Time;
CC Provider 1: (Name)	CC Provider 2: (Name)	CC Provider 3: (Name)	CC Provider 4: (Name)	* Ordering Physician: (Name) Koll, Edward Steve, MD
[•] Order Datel lime: 08-Auq-2018 ↓ 1508 ↓	[•] Order Communication Type: Paper/Fax ✓			Add 3



7 You are now ready to submit your order. Review the information in the box below and then click **Submit**. The Order Status changed to *Submitted*. The Accession Number is assigned at this time.

Anything submitted that is in an ordered status, will also show up on the Online Work List.



8

To see your Order in the Online Work List, click on the **Online Work List** icon **Storefront**. This is another application in RadNet and is used to show orders and order statuses. This is the main area technologists will add allergies, cc other providers, as well as start and complete exams in **Exam Management**.



NOTE: An Options pop-up will occur if this is the first time you opened the Online Worklist. Click OK to pass through.

Set Filters for the Online Work List

When you first open the **Online Work List**, you will need to set your filters appropriately to view your order. When you have your own login you can set it up to your specific location and modality. You will likely select the current date plus or minus 12 hours.

For this activity, In the Exam Filters window:

- 1. Select your Location= LGH Lions Gate LGH Lions Gate
- 2. Select the Date/Time interval for your current date, plus/minus 3 days
- 3. Click OK

Y Exam	n Filters	×
Locations Description BCG XR SS BCG XR Port 1 CON XR Rm 1 CON XR	Date/Time ● 08-Aug-2018 (Today, Current Time) Plus 3 ↓ days ∨ Minus 3 ↓ days ∨ Only show today's items ○ Date **_***** ↓ ↓ ○ Between **_**** ↓ ↓ And **_****_*** ↓ ↓ OK Can	2 cel



```
9
```

You should now see your order in the Online Work List.

E		Cerner	Imaging:	Online Work List		- 🗆 🗙
Task View Launch Help)					
🏹 😔 🛕 🙋 😂 🔉 🔈	0 📝 🔒 🚳					
Filters 08-Aug-2018 + 3 days to - 3	days					As of:03:32 PM
Department: LGH Med Imaging	Section: All sections		Subsect All subse	ion: ections	Exam Room: All exam rooms	
Exam Transcription						
Show completed exams						
Patient Name	Allergies	Patient Type		Procedure Name	Accession Number	Priority
VALIDATE, ADAM	<u> </u>			CT Abdomen w/ + w/o Co)	Routine
VALIDATE, ADAM	<u> </u>			MRI Pelvis w/ Contrast		Routine
VALIDATE, ADAM	4			MRI Pelvis w/ Contrast	_	Routine
VALIDATE, MITECH		Outpatient		XR Ankle Right	112-XR-18-3000079	Routine
<						>
Total cases: 4					Deta	ils Exit



NOTE: You can set colour preferences from the view button to identify order types such as STAT, portable etc. once you have your own account to set personal preferences.



Activity 1.3 - Activate a Future Order from Department Order Entry (DOE)

Providers within our system can place orders for future exams that are either schedulable (e.g. MRI, CT, Ultrasound and IR exams) as well as non-schedulable (X-rays).

X-rays are typically ordered exams in Department Order Entry. These will display on a Future Orders tab. All other modalities will be scheduled for appointments via the Scheduling Appointment Book area and will NOT be activated from this tab.

The process for Activating Future Orders is very similar to the previous activity.

1 In order to see future orders placed on a patient, access **DOE** from Storefront by clicking on the icon.

NOTE: You can use the **DOE** already opened and minimized but ensure you are using the correct patient. You should only have one of each application open at a time.

2 Select **Task** and **Clear Orders** to remove previous patients.



Enter the *Client* as **LGH Medical Imaging.** Using the magnifying glass, search for your patient and Add a New Encounter using the same information you previously used in Activity 1.2, Section 3.

After finishing this, your patient will be populated in the Demographics area in DOE with their new Encounter Number.

Client: LGH Medical Imaging	✓ Person nar	me: VALIDATE, MITECH		
Demographics	FIN: 760000010042	MRN: 760002014	Loc: LGH Med Imaging	/ LGH Med Imaging / LGH Medical Imaging
VALIDATE, MITECH	Gender: Male	Age: 79 years DOB: 13-Aug-1938	Admitting: Admitted: 08-Aug-201	Attending: 8 15:58



To activate a future order on this specific encounter.

- 1. Click on Task.
- 2. Click on Activate Future Orders.

æ	-11	Department Order Entry - Order Ent	ry
Tas	k View Order	Customize Help	
~	Order Entry	E 🛅 📑 E 🖉 🚳 🛍 💩 🔈 🏷	
	Accession Add On		
	Cancel Orders	Person name:	
	Modify Orders		
	Batch Orders		
	Activate Future Orders	Ane:	Loc ∆dn
	Patient Registration	2 r. DOB:	Adn

3 The window with **Future Orders** from the patient's PowerChart opens:

- 1. Click the **Rad** tab.
- 2. Choose the order you want to activate (**XR Chest**). This will highlight in blue.
- 3. Click Activate at the bottom of the list.

1è			Future Order	'S	_ 🗆 🗙
🍕 🗚 📚 🟠					
Future Orders	X	+			
Future Orders	_	_	_	_	≣∗⊗
Look back (Overdue): Ordering Location: All Lab (0) Rad (2	Locations V	ok forward (Upco	oming): 1month	✓ Provider: AI	Providers
Order	Grace Period	Order Date	Provider	Ordering	Details
∠ Overdue (2)					
XR Chest	26/07/2018 - 26/07/2018	26/07/2018 2	TestUser, GeneralMedicin e-Physician, MD	LGH 6E	26-Jul-2018, Routine, Reason: cough, Order for future visit
XR Wrist Left	26/07/2018 - 26/07/2018	20707/2018	TestUser, GeneralMedicin e-Physician, MD	LGH 6E	26-Jul-2018, Routine, Reason: #?, Order for future visit
Due (0) Upcoming (0)					3
				🍣 Refresh	Activate Cancel/Discontinue

4. Search back over 4 months or more if no orders appears.





4 The Department Order Entry – Activate Future Orders screen appears with your patient information populated. Double-click the **order** to move it into the orderable area.

You will now be able to verify/modify information entered by the Ordering Provider such as Requested Date, Priority, and Reason for Exam etc. which you can do from the paper X-ray Requisition.

Demographics FIN: 760000001004 VALIDATE, MITECH Gender: Male			760000010042 der: Male	MRN:760002014Loc:Age:79 yearsAdmittDOB:13-Aug-1938Admitt				LGH Med Imaging / LGH Med Imaging / LGH Medical Ima titing: Attending: tted: 08-Aug-2018 15:58					
Orderable XR Chest	Order Status Future	D	epartmental Status n Hold	Start Date/Time 26-Jul-2018 13:4	45	Order Details 26-Jul-2018 13:45 F	PDT, Routine, R	eason: c	ough, Order for future visit				
* Requested Sta 08-Aug-2018	art Date/Time:	*	* Priority: Routine	¥		* Reason for Exam: cough			Special Instructions / Note	es to Sc		^	
Provider Callba	ck Number:]	Pregnant:			Transport Mode:	~]	Performing location:		•		
Special Handlin	ng:		lf Portable, specify r	eason:		Other Reason for Po	ortable:]	Request Received Date/T	ime: 1345			
CC Provider 1: (Name)		CC Provider 2: (Nan	ne)	٩,	CC Provider 3: (Nam	ne)		CC Provider 4: (Name)		٩		
CC Provider 5:	Name)	Q	Order for future visit			* Ordering Physician TestUser, GeneralMedi	i: (Name) icine-Physician, M	I 🔍	* Order Date/Time: 26-Jul-2018	134	1	~	
									Add		Submit		

1. Click Add.

- 5 You are now ready to submit your order. Review the information in the box below and then click **Submit**. The Order Status changed to Submitted. The Accession Number is assigned at this time.
 - **NOTE**: Anything submitted that is in an ordered status, will also show up on your Online Work List.
- 6 To see your Order in the worklist, click into the **Online Work List** from Storefront. Click the grey bar to arrange each column alphabetically or by date. Identify your Order.

Exam Transcription										
Show completed exams										
Patient Name	Allergies	Patient Type	Procedure Name	Accession Number	Priority					
VALIDATE, ADAM	<u> </u>		CT Abdomen w/ + w/o Co		Routine					
VALIDATE, ADAM	<u> </u>		MRI Pelvis w/ Contrast		Routine					
VALIDATE, ADAM	<u> </u>		MRI Pelvis w/ Contrast		Routine					
VALIDATE, ADAM	<u> </u>	Outpatient	NM Bone Marrow	112-NM-18-3000000	Routine					
VALIDATE, MITECH	<u> </u>	Outpatient	XR Chest	12-XR-18-3000080	Routine					
VALIDATE, MITECH	<u> </u>	Outpatient	XR Ankle Right	112-XR-18-3000079	Routine					



Activity 1.4 – Create a Duplication Order using DOE

You may get a request from a patient, Health Records, or another health care provider to supply a copy of the patient records. To do this, it is required to create a Duplication Order in the CIS.



- 1. Open **Department Order Entry (DOE)** is by clicking on its icon.
- 2. Choose the Client from the drop-down list. Then, search for the patient name by clicking on

the	Magnifying Glass icor	n ៉ which will open the Encou	nter Search window
📒 Dep	aartment Order Entry - Order Entry		
Task	Edit View Order Customize Help		
0 -	🕨 🚫 🔌 💷 🅦 🔍 🔍 🔜 🏣	iii 😔 🚳 🧶 iii 🔈 📎	
Clien	t LGH Intensive Rehabilitation Outpatient f	Person name:	
-Demo	LGH Joint Replacement Access Clinic JF LGH Lab Northmount LGH Laboratory	AC FIN:	MRN:
	LGH Lions Gate Hospital LGH Medical Imaging LGH Neuro Rehab Outpatient Clinic	Gender:	DOB:
	LGH North Shore Hospice	•	

- 3. Search for your Patient.
- 4. Select your Patient and the encounter you want to create the Duplication Order against.

3					Enco	unter S	Search									×
BC PHN:	VIP 1	Deceased	Alerts Process Alert	BC PHN 9860002014	MRN 760002014	Name 4 VALID	ATE, MITECH	DOB 13-Aug-19	38 11:36	Age 80 Years	Gender Male	Address 2015 West Br	roadway	Address (2)	City Vancouv	Po er V6
Last Name:																
First Name: mitech DOB: ss_sess_sess																
Gender: ✔ Postal/Zip Code:	<														4	>
Any Phone Number:	Facili Mil Li	ity GH Lions Gati	Encounter‡ e 760000000	Visit #	E 0002014 ir	nc Type npatient	Med Service General Intern	al Medicine	Unit/Clir LGH 6E	nic Room 6EL	Bed E	ist Arrival Date	Reg Da 23-Jul-2	ate 2018 11:36	Disch Date	Atter Testl
Visit #:																
Search Reset																
MPI Se 3	<															>
								OK		Cancel		Preview	Add	Person	Add Enco	iunter

You will now see your patient populated in the banner bar in DOE.

5. Click **Magnifying Glass** icon beside Orderable.



🔚 Dep	artmen	t Order E	Entry - Ord	ler Entry							
Task	Edit	View	Order	Customize	Help						
	- 0	S	1	8 🗹	i 🖿 📑 📑						
Clier	t LGH	Medica	l Imaging	J	•						
Dem	ographi	ics									
C											
Orde	rable:										

The Find Orderable window will open.

- 6. Search for the modality followed by Duplication. Using our previous example of **XR Chest**, select **XR Duplication**.
- 7. Click OK

6	Find Orderable	
ind: KR Duplication		Search
Orderable:		P
Orderable	Description	Department Display Name
XR Consultation Email	XR Consultation Email	XR Consultation Email
XR Consultation External Study	XR Consultation External Study	XR Consultation External Study
XR Consultation Phone	XR Consultation Phone	XR Consultation Phone
XR Duplication	XR Duplication	XR Duplication
XR Elbow Bilateral	XR Elbow Bilateral	XR Elbow Bilateral
XR Elbow Left	XR Elbow Left	XR Elbow Left
XR Elbow Right	XR Elbow Right	XR Elbow Right
XR Facial Bones	XR Facial Bones	XR Facial Bones
XR Femur Bilateral	XR Femur Bilateral	XR Femur Bilateral
XR Femur Left	XR Femur Left	XR Femur Left
XR Femur Right	XR Femur Right	XR Femur Right
XR Finger Left	XR Finger Left	XR Finger Left
XR Finger Right	XR Finger Right	XR Finger Right
YR Foot Rilateral K	YR Foot Rilataral	YR Foot Rilateral 7
		OK Cancel

The Order will now populate into the DOE window.

- 8. Fill out the Ordering Physician mandatory field using Test, Alex.
- 9. Select Add

Orderable: El Duplica	ton						8				
* Priority: Routine	÷	*Reason for Exam: Duplication	Q	*Requested Sta 30-Nov-2017	rt Date/Time:	* Ordering Physician: (Name)		* Order Date/Time 30-Nov-2017	1153	*	
* Order Communication Paper/Fax	n Type: •										
										9	ļ
										Add	Submit



10. The Order will now move to the bottom window. Click **Submit**.

									Add	Subm	nit
											10
. A	ction	Client	Medical Record Nu	Financial Number	Person Name	Catalog Type	Procedure	Accession	Submission St	Start Date/	10
0	Order	LGH Lions Gate Hos	760002014	760000002014	VALIDATE, MI	Radiology	XR Duplication	112-XR-18-30	Submitted	14-Aug-20	lo

You can now find the Duplication Order in the **Online Work List**.

11. Right-click the Order in the **Online Work List** and select **Exam Management**.

Exam Transcription					
✓ Show completed exams					
 Patient Name	Allergies	Patient Type	Procedure Name	Accession Number	Priority
ED-Phy-Seven, Monty	Anorgios	Emergency	XR Chest	112-XR-18-3000083	Urgent
IP-PHY-Six, Jane	<u> </u>	Inpatient	XR Chest	112-XR-18-3000082	Routine
MITECH, MICHAEL	<u> </u>	Outpatient	XR Wrist Left	112-XR-18-3000081	Routine
MITECH, MICHAEL	<u>^</u>	Outpatient	XR Chest	112-XR-18-3000079	Routine
MITECH, MICHAEL	<u>^</u>	Outpatient	XR Ankle Right	112-XR-18-3000080	Routine
VALIDATE, MITECH	<u> </u>	Inpatient	XR Chest	112-XR-18-3000084	Routine
VALIDATE, MITECH	<u> </u>	Inpatient	XR Duplication	112-YR-18-3000085	- 11
				Print\Reprint Patient Pa	cket
				Exam Management	
				Transcription	

The **Exam Management** window opens. By default, your name will display in the Personnel List.

- 12. Click **Start** changing the status to Started.
- 13. Click **Complete**.

G		С	erner Imaging: Exam Managem	ient		- 🗆 🗙
Task Edit View Select By	y Launch Help					
🗾 🚫 🧟 😂 🌚 🖉 🏹	> 🛼 🗹 💫 🙋 👪 🔈	11				
			Personnel		Date/Time	
* Accession: 112-XR-18-300	00085 🔍 🔍 🛕 🗛	lergy	Name Primary Train, Medicallma Additional	gingTechnologist-Ra	Use current date/time	
Patient Information						
MRN: 760002014 Name: VALIDATE, MITE DOB: 13-Aug-1938	сн	^			Show completed exams	Show all accessions
Age: 80 Years						
Encounter type: Inpatie	ent				Institution: LGH Lions Gate	¥
Location: LGH 6E / 6EL	/ 02	~		Clear	Room: LGH Clerical Rm	~
	1					
Procedure	Comment	Reason for Exam	Accession	Start Dt/Tm	Complete Dt/Tm	Status
XR Duplication		Duplication	112-XR-18-3000085	14-Aug-2018 14:57	7 14-Aug-2018 15:03	Completed
٢					12	13 >
				Image Manage	ment Start Comple	te Exit
Ready.						15:03

The Exam Management Bill- Only Charging window opens.

- 14. Select the **Bill-Only/Category** to bill to.
- 15. Use the right-facing arrow to move it to the **Charges** window.
- 16. Click **OK**. You can now exit out of the Exam Management Screen.



Exam Management Bill-O	nly Charging: VALIDATE, MITECH - 760002014
Accession: 112-XR-18-3000085 Order Date/Tin Procedure: XR Duplication Responsible perso	ne: 14-Auq-2018 🔷 🗙 1457 🖕 on: Train, MedicallmagingTechnologist-F 🗸
New Charges Previously Charged	
Default selections All bill-onlys Categories:	Charges:
Bill-Only/Category CPT	Quantity Bill-Only CPT
Duplication Bill Onlys Duplication Legal	1 Duplication Patient Request
Imported or Copied Study by Clerk	Quantity: 16
imported or Copied Study by Tech	
	× 15
	~~
	_
L	<u> </u>
	OK Cancel Apply



Activity 1.5 – Exploring the RadNet Online Work List: Modify Order Details, Replace and Cancel Orders

Actions on the order such as modify, replace or cancel, can be accessed from the **Online Work List**. Prior to choosing the action, click on the order to highlight it in blue.



NOTE: Most of the actions available in the menu bar at the top are also available to you by selecting the patient/exam and right-clicking.

Modify an Exam

Use the same patient from the previous activity and modify the **XR Chest**.

- 1. Select the order you would like to modify by highlighting it in blue.
- 2. Right-click on the order and select **Modify Order Details**.

Patient Name	Allergies	Patient Type	Procedure Name	Accession Number	Priority
VALIDATE, ADAM	<u> </u>	Outpatient	XR Chest	112-XR-18-3000079	Routine
VALIDATE, ADAM	<u>à</u>	Outpatient	Print'Reprint Patient Packet	112-CT-18-3000019	Routine
VALIDATE, ADAM	<u> </u>	Outpatient	Exam Management	112-XR-18-3000080	Routine
			Transcription		
			Schedule Inquiry		
			Protocol		
			Add Interesting Case File		
			Comments		
			Allergies		
			Patient Exam History		
			Document Image		
			Modify Order Letails		
			Replace		
			Details		

The Order Details pop-up window opens. You can modify the order details here as required such as adding their transport mode, whether an interpreter is required or cc'ing another provider so they can get a copy of the patient's results. Explore all the fields and ensure all yellow mandatory fields are complete.

- 1. Add a new CC: Provider: Test, Med E.
- 2. Click OK



*Requested Start Date/Time:	*Priority:	*Reason for Exam:
10-Aug-2018 ≑ 🗙 0828 ≑	Routine	v broken rib
Special Instructions / Notes to Scheduler:	Provider Callback Number:	Brannaut
		Fleynani
Transport Mode:	Performing location:	Special Handling:
	·	×
If Portable, specify reason:	Other Reason for Portable:	Request Received Date/Time:
		10-Aug-2018 😴 🗸 0831 😴
CC Provider 1:	CC Provider 2:	CC Provider 3:
Test, Med E, RPh		
CC Provider 4:	CC Provider 5:	
Radiologist Worklist:	Research Study:	Lateria Handled In Defension
	×	Isolation ruentilieu by Patient/Provider?
Interpreter Required?:	Language:	*Ordering physician:
	×	V Test, Alex
*Communication type:	*Order DT/TM:	

2 Replace an Exam

The Radiologist comes to you and says that they'd like to change the **XR Chest** to an **XR Chest/Abdomen Single Exposure**.

- 1. Select **XR Chest** so it is highlighted
- 2. Right-click and select **Replace**.

Patient Name	Allergies	Patient Type	Procedure Name	Accessio	n Number	Priority
VALIDATE, ADAM	<u> </u>	Outpatient	XR Chest	112 112	10 0000070	in é
VALIDATE, ADAM	<u> </u>	Outpatient	CT Chest w/o Contrast	112	Print\Reprint Patient	t Packet
VALIDATE, ADAM	<u> </u>	Outpatient	XR Ankle Right	112	Exam Management	
					Transcription	
					Schedule Inquiry	
					Protocol	
					Add Interesting Case	e File
					Comments	
					Allergies	
					Patient Exam History	,
					Document Image	
					Modify Order Details	s
					Replace	
				L	Details	

The Replace Procedure window pops up. Explore this window. You can scroll and choose from a list of most usual exams used to replace the initial order. If the requested replacement exam is not in the list, type it in the *Replace with* in the textbox.



NOTE: Click the Show all procedures box to see more procedures.

- 1. Choose the replace with **XR Chest/Abdomen Single Exposure** from the drop-down menu.
- 2. Select the Replace Reason of **Changed by Radiologist as per Protocol**.
- 3. Ensure that the **Copy accession to new order** box is checked.
- 4. Click **OK**.



🗴 🗟 Replace Proc	edure	×
Patient Information		
Name: VALIDATE, ADAM		
ID: 760002141		
Accession: 112-XR-18-3000079		
Procedure: XR Chest		
* Replace with:		
XR Chest/Abdomen Single Exposure		
XR Chest PH Probe		÷.
<		>
Replace reason:		
Changed by radiologist per protocol		~
Person authorizing replace:		
		<u> </u>
Communication Type:		
Paper/Fax		~
Ordering Physician:		
Test, Alex		<u> </u>
Exam room for new order:		
LGH XR Rm 5		~
Copy accession to new order		
Show all procedures		
Modify order details		
	ок	Cancel
Ready		

NOTE: You can only replace within the same modality. If you are changing modalities, you **must cancel and reorder**.

Click the Modify order details box to change the details in one step.

In the Online Work List both orders are displayed with the same accession number. The old order, XR Chest, has the status changed to *Replaced*, while the new order's status is *Ordered*, as long as the **Show completed exams** box is checked.

Show completed ex	ams							
Patient Name	Allergies	Patient Type	Procedure Name	Accession Number	Priority	Status	Requested DT/TM	Status D
VALIDATE, ADAM	<u> </u>	Outpatient	CT Chest w/o Contrast	112-CT-18-3000019	Routine	Ordered	10-Aug-2018 08:29	10-Aug-
VALIDATE, ADAM	<u> </u>	Outpatient	XR Ankle Right	112-XR-18-3000080	Routine	Ordered	10-Aug-2018 08:30	10-Aug-
VALIDATE, ADAM	<u> </u>	Outpatient	XR Chest/Abdomen Sing	112-XR-18-3000079	Routine	Ordered	10-Aug-2018 08:28	10-Aug-
VALIDATE, ADAM	<u> </u>	Outpatient	XR Chest	112-XR-18-3000079	Routine	Replaced	10-Aug-2018 08:28	10-Aug-

3

Cancel an Exam

You will now learn how to cancel an exam. Your patient's Primary Care Provider calls and asks for the **XR Ankle Right** to be **cancelled**.

1. Right-click on the exam in the Online Worklist and select **Exam Management**.

Patient Name	Allergies	Patient Type	Procedure Name	Accession Number	Priority	Status	Requeste
VALIDATE, ADAM	<u> </u>	Outpatient	CT Chest w/o Contrast	112-CT-18-3000019	Routine	Ordered	10-Aug-2
VALIDATE, ADAM		Outpatient	XR Ankle Right	112-XR-18-3000080	Den altere	L	10-Aug-2
VALIDATE, ADAM	<u> </u>	Outpatient	XR Chest/Abdomen Sing	112-XR-18-3000079	Print\Reprint Pat	ient Packet	10-Aug-20
VALIDATE, ADAM	<u>^</u>	Outpatient	XR Chest	112-XR-18-3000079	Exam Managem	ent	10-Aug-20
					I ranscription		
					Schedule Inquiry	,	
					Dretecel		
					Protocol		
					Add Interesting	Case File	



The Exam Management window will open.

1. Identify the Cancel exam icon in the menu bar and click it.

50
Task Edit View Select By Launch Help
📝 🚳 🕿 📽 🗢 🖏 💺 🗹 👪 🖉 🗷 🖉
* Accession: 112-XR-18-3000080
MRN: 760002141
Name: VALIDATE, ADAM
DOB: 15-Aug-1938
Age: 79 Years
Gender: Male

The Order Details window opens.

- 1. Choose the **Cancel Reason =** *No Longer Medically Indicated*
- 2. Enter the **Communication Type =** Verbal
- 3. Enter the *date and time* of cancellation.
- 4. Click OK

NOTE: By entering "t" in the Date and "n" in the Time section (3), the system automatically populates it with the current date and time

E	Order Details for 1	112	-XR-18-3000080: XR Ankle Right		-		×
*Cancel Reason: No Longer Medically In *Communication type:	licated v		*Cancel DT/TM: 10-Aug-2018 V 0930 *Canceling physician:				
Verbal Cancel Comment	۷		Test, Alex				
		ŝ					
]	_			
			ОК	R		Cance	:I

You can click **Exit**. Within the Online Work List, the order's status changes to **Canceled**. You may need to refresh your Online Work List. You can do this by clicking the **As of:** *TIME* in the top right

С	orner As of:11:0	00 AM						
	Show completed example	ams						
	Patient Name	Allergies	Patient Type	Procedure Name	Accession Number	Priority	Status	Reque
	VALIDATE, ADAM	<u> </u>	Outpatient	XR Ankle Right	112-XR-18-3000080	Routine	Canceled	10-Au
	VALIDATE, ADAM	<u> </u>	Outpatient	CT Chest w/o Contrast	112-CT-18-3000019	Routine	Ordered	10-Au
	VALIDATE, ADAM	<u> </u>	Outpatient	XR Chest/Abdomen Sing	112-XR-18-3000079	Routine	Ordered	10-Au
	ALIDATE, ADAM	1	Outpatient	XR Chest	112-XR-18-3000079	Routine	Replaced	10-Au



Activity 1.6 – Exploring the RadNet Online Work List

Review Allergies

In the Online Work List, identify the Allergies column (1). There are four types of notifications:

- 1. ANR = Allergies Not Recorded
- 2. NKA = No Known Allergies,
- 3. NKMA = No Known Medication Allergies
- Image: second states and the presence of allergies. 4.

Exam Transcription

1.1

 Show completed exams 						
Patient Name	Allergies	Patient Type	Procedure Name	Accession Number	Priority	Requested DT/TM
MICLERKONE, ADRIAN	<u> </u>	Outpatient	XR Chest	112-XR-18-3000082	Routine	13-Sep-2018 09:14
MICLERKONE, ADRIAN	<u> </u>	Outpatient	XR Duplication	112-XR-18-3000086	Routine	13-Sep-2018 09:17
MICLERKONE, ADRIAN	<u> </u>	Outpatient	US Abdomen	112-US-18-3000006	Routine	13-Sep-2018 09:53
MICLERKONE, ADRIAN	<u> </u>	Outpatient	XR Chest/Abdomen Sing	112-XR-18-3000082	Routine	13-Sep-2018 09:14
MICLERKONE, JIM		Outpatient	XR Chest	112-XR-18-3000083	Routine	13-Sep-2018 09:14
MICLERKONE, JIM	<u> </u>	Outpatient	XR Duplication	112-XR-18-3000084	Routine	13-Sep-2018 09:16
MICLERKONE, JIM		Outpatient	XR Abdomen Single View	112-XR-18-3000083	Routine	13-Sep-2018 09:14
MICLERKTWO, BRIAN	<u> </u>	Outpatient	XR Ankle Right	112-XR-18-3000079	Routine	13-Sep-2018 08:58
MICLERKTWO, JUSTIN		Outpatient	XR Ankle Right	112-XR-18-3000080	Routine	13-Sep-2018 08:58
MICLERKTWO, JUSTIN	<u> </u>	Outpatient	XR Knee Right	112-XR-18-3000081	Routine	13-Sep-2018 09:01
MICLERKTWO, JUSTIN	<u> </u>	Outpatient	CT Head Spine Cervical	112-CT-18-3000019	Routine	13-Sep-2018 09:55
MITECH, GLEN	<u> </u>	Outpatient	XR Chest	112-XR-18-3000090	Routine	13-Sep-2018 09:40
MITECH, GLEN	<u> </u>	Outpatient	XR Chest/Abdomen Sing	112-XR-18-3000090	Routine	13-Sep-2018 09:40
MITECH, GLEN	<u> </u>	Outpatient	XR Ankle Right	112-XR-18-3000087	Routine	13-Sep-2018 09:20
MITECH, MICHAEL	<u> </u>	Outpatient	XR Chest/Abdomen Sing	112-XR-18-3000089	Routine	13-Sep-2018 09:37
MITECH, MICHAEL	<u> </u>	Outpatient	XR Chest	112-XR-18-3000089	Routine	13-Sep-2018 09:37
MITECH, MICHAEL	<u> </u>	Outpatient	XR Ankle Right	112-XR-18-3000088	Routine	13-Sep-2018 09:24
MITECH, NOEL	<u> </u>	Outpatient	XR Ankle Right	112-XR-18-3000085	Routine	13-Sep-2018 09:20
MITECH, NOEL		Outpatient	XR Chest	112-XR-18-3000091	Routine	13-Sep-2018 09:43
MITECH, NOEL		Outpatient	XR Chest/Abdomen Sing	112-XR-18-3000091	Routine	13-Sep-2018 09:43

Mark Allergies as Reviewed

2

Allergies must be reviewed for a patient on every encounter. Check the allergies on your patient with the XR Chest/Abdomen Single Exposure:

1. Right-click your patient and select **Allergies**.

VALIDATE, ADAM		Outpatient	CT Chest w/o Contrast	112-CT-18-3000019	Rou
VALIDATE, ADAM	<u> </u>	Outpatient	XR Chest/Abdomen Sing	112 VD 10 2000070	Dai
VALIDATE, ADAM	<u> </u>	Outpatient	XR Chest	Print\Reprint Patient Packet	
				Exam Management	
				Transcription	
				Schedule Inquiry	
				Protocol	
				Add Interesting Case File	
				Comments	
				Allergies	
				Patient Exam History	

The patient's allergy profile opens. After reviewing the allergies:

- 1. Click Mark All as Reviewed.
- 2. You will note that the Reviewed and Reviewed By columns have changed to the current time



and your name will populate.

*							Allerg	y/ADR Profi	le				х
Alle	ergy												
	Mark All as Review	ed	Refresh (last at 1	15:21 PDT)									
+	Add Modif	ý 💭 No K	nown Allergies	🔾 No	o Known I	Medi	cation Allergi	es 🔗 Reve	rse Allergy Ch	eck	Display All	~	
+.	Add Modif	y ÖNo K	nown Allergies Reactions	Seve	Known l	Medi C.	cation Allergi Est. Onset	es Reve	rse Allergy Ch Updated By	eck Source	Display All Reviewed	✓ Reviewed By	I
+ . D.	Add Modif	y ONo K Category Food	Reactions Hives	Seve Severe	Type Allergy	Medi C.	cation Allergi Est. Onset	Reaction S Active	Updated By 26-Jul-201	eck Source	Display All Reviewed 14-Aug-2018 15:21 PDT	 Reviewed By Train, Medicallmagin 	I

3

Add a Comment

Comments can be added to a patient for various reasons. For example, one of the patients coming today for an exam needs assistance to walk. You need to add a note to the order.

1. Select the **order** by highlighting it in blue. Right-click and select **Comments**.



The Comments window will open. Choose the appropriate tab (**Order Comment, Order Note** or Cancel Reason).

- 2. Click **Edit** and type in the free text box = *needs* assistance to walk.
- 3. Click OK.
- 4. Click Close.

			Comments		
Order C	Comment	Order Note	Cancel Reason		
VALIDA	TE, ADAM		XR Chest/Abdomen	Single Exposure	
76000		Edi	t Comment		
	Comment typ	pe:			^
	Order Com	nent		×	
	Comment				
	Needs a	ssistance to wa	lk	^	
			2		
			_		
			3	J.	
	₫ 1		ОК	Cancel	· · · · ·
			Close	Add	Edit
			4	~~~~	Luk

Your comment can be viewed if you right-click the patient name and select Comments. The



comments column will now have the Comments icon present; you may have to scroll to the right.

VALIDATE, ADAM		Outpatient	CT Chest w/o Contrast	112-CT-18-3000019	Routine	Ordered	10-Aug-2018 08:29	
VALIDATE, ADAM	<u> </u>	Outpatient	XR Chest/Abdomen Sing	112-XR-18-3000079	Routine	Ordered	10-Aug-2018 08:28	9
VALIDATE, ADAM	<u> </u>	Outpatient	XR Chest	112-XR-18-3000079	Routine	Replaced	10-Aug-2018 08:28	

NOTE: Order Comments will be displayed both in the RadNet Online Work list as well as other areas where the Order is visible, such as PowerChart. Order Notes are displayed only within the RadNet system and should only be used for departmental documentation.

Review Patient Exam History 4

Check your patient's exam history in order to see what other orders were placed and completed on this patient. From any of the orders placed on the patient,

1.	Right-click	to acc	cess the	drop-down	menu and	d click o	n Patient	Ex	am	History.	
				_							

		T				
Status	Priority	Patient Name	Procedure Name	Tr	Or	Requested DT/TM
On Hold	Routine	CSTPRODMI, TESTADRIENNE	MRI Spine Cervical w/o Contrast		ě	08-Dec-2017 15:05
Ordered	Routine	CSTPRODMI, TESTADRIENNE	CT Chest Abdo Pelvis w/ + w/o Contrast	D.:		
On Hold	Routine	CSTPRODMI, TESTADRIENNE	NM Myocardial Perfusion Rest	Pri	nt\Kepr	nt Patient Packet
On Hold	Routine	CSTPRODMI, TESTADRIENNE	NM Myocardial Perfusion Treadmill	Exa	m Man	agement
Completed	Routine	CSTPRODMI, STLGH	RF Esophagus Stomach Duodenum	Tra	nscripti	on
Completed	Routine	CSTPRODMI, STLGH	RF Esophagus Stomach Duodenum	Sch	nedule I	nguiry
Completed	Routine	CSTPRODMI, STLGH	CT Duplication	Dee		
Completed	Routine	CSTPRODMI, STLGH	CT Elbow Arthrogram Left	PIC		
Completed	Routine	CSTPRODMI, STLGH	CT Elbow Arthrogram Right	Ad	d Intere	sting Case File
Completed	Routine	CSTPRODMI, STLGH	CT Elbow w/ + w/o Contrast Right	Co	mment	
Completed	Routine	CSTPRODMI, STLGH	CT Elbow w/ + w/o Contrast Left	A11		
Completed	Routine	CSTPRODMI, STLGH	CT Elbow w/ Contrast Right	410	ennes	
Completed	Routine	CSTPRODMI, STLGH	CT Elbow w/ Contrast Left	Pat	ient Exa	m History

NOTE: Only exams that have been ordered/ completed since the CIS went live at your site will be visible.

The Order Viewer will open. Here you can see displayed the entire list of orders placed on the patient, and the status.

1. The menu bar allows you to see what other functions you are able to do from here. Click to explore.

Task View Select	By Launch Help	1					
C G R G G G	ent 1950 mm (mg) date mm						
* Patient name: CS	TPRODMI, TESTADRIENNE	As of: 8:35 Allergy					
Patient Information							
Name: CSTPR MRN: 700003 Accession:	ODMIL TESTADRIENNE 789	D A G	OB: 25-May- ge: 22 Years ender: Fema	1995 sle			
No Exclusion Filter	s Applied						
* Request DT/TM	Accession	Order	Priority	Status	Exam Status	Report Status	Order Details
12-Dec-2017 10:00		NM Myocardial Perfusion Treadmill	Routine	Future	On Hold	New	12-Dec-2017 10:00 PST, Routine, Reason: cetest, Weight: 50, Transport, Ambulatory
12-Dec-2017 08:00		NM Myocardial Perfusion Rest	Routine	Future	On Hold	New	12-Dec-2017 08:00 PST, Routine, Reason: cetest, Weight: 50, Transport, Ambulatory
11-Dec-2017 08:19	112-CT-17-0004994	CT Chest Abdo Pelvis w/ + w/o Contr	Routine	Ordered	Ordered	New	11-Dec-2017 08:19 PST, Routine, Reason: Query pneumonia
08-Dec-2017 15:05		MRI Spine Cervical w/o Contrast	Routine	Future	On Hold	New	08-Dec-2017 15:05 PST, Routine, Reason: test future on request queue, Order for future visit, Schedu
08-Dec-2017 14:33	112-CT-17-0004980	CT Abdomen w/ Contrast	Routine	Ordered	Ordered	New	08-Dec-2017 14:33 PST, Routine, Reason: Abdomen Pain
08-Dec-2017 13:30		CT Elbow Arthrogram Left	Routine	Canceled	Canceled	Canceled	08-Dec-2017 13:30 PST, Routine, Reason: Query fracture, Transport. Ambulatory
08-Dec-2017 13:30	112-CT-17-0004968	CT Elbow w/ Contrast Left	Routine	Ordered	Ordered	New	08-Dec-2017 13:30 PST, Routine, Reason: Query fracture, Transport: Ambulatory
08-Dec-2017 08:50	112-IR-17-0001826	IR Biopsy Liver Transjugular	Routine	Ordered	Ordered	New	08-Dec-2017 08:50 PST, Routine, Reason: MI IR Workbook, Transport Ambulatory, Scheduling Loca
07-Dec-2017 16:45		CT Ankle wi + w/o Contrast Left	Routine	Future	On Hold	New	07-Dec-2017 16:45 PST, Routine, Reason: Query Fracture, Transport Ambulatory
07-Dec-2017 09:32	112-XR-17-0006485	XR Chest	Routine	Ordered	Ordered	New	07-Dec-2017 09:32 PST, Routine, Reason: Query Pneumonia
07-Dec-2017 08:58	112-US-17-0003816	US Abdomen and Doppler	Routine	Canceled	Canceled	Canceled	07-Dec-2017 08:58 PST, Routine, Reason: Query gallstones, Baggoo, Alan Kieth
07-Dec-2017 08:58	112-US-17-0003816	US Abdomen	Routine	Canceled	Replaced	Canceled	07-Dec-2017 08:58 PST, Routine, Reason: Query galistones, Baggoo, Alan Kieth
07-Dec-2017 08:42	112-XR-17-0006480	XR Abdomen Single View	Routine	Ordered	Ordered	New	07-Dec-2017 08:42 PST. Routine. Reason: Lung Test



5 Print\Reprint Patient Packet

If you need to re-print the patient packet (requisition and labels) from the XR Chest

- 1. Select the exam
- 2. Right-click on the exam and select **Print\Reprint Patient Packet**

Exam Transcription					
Show completed exams	;				
Patient Name	Allergies	Patient Type	Procedure Name	Accession Number	Prio
ED-Phy-Seven, Monty	<u> </u>	Emergency	XR Chest	112-XR-18-3000083	Urg
IP-PHY-Six, Jane	<u>^</u>	Inpatient	XR Chest	112-XR-18-3000082	Ro
MITECH, MICHAEL	<u> </u>	Outpatient	XR Wrist Left	112-XR-18-3000081	Ro
MITECH, MICHAEL	<u>^</u>	Outpatient	XR Chest	112-XR-18-3000079	2
MITECH MICHAEL	<u> </u>	Outpatient	XR Ankle Right	112-XR-18-3000080	
VALIDATE, MITECH	<u> </u>	Inpatient	XR Chest	Print\Reprint Patient Packe	t T
VALIDATE, MITECH	4	Inpatient	XR Dup	Even Management	
				Exam Management	
				Transcription	

The Reprint Packet window opens.

- 1. Click on checkboxes to choose the document you want to print
- 2. The type of document can be selected
- 3. Select the printer
- 4. Click on the **ellipsis** button (to choose the printer and the location. It will automatically default to the pre-selected printer

	R	eprint Packet	×
Reprint	Туре	Printer	
	Folder Label	lgh_usxray_t2_fold	✓ …
	Content Label	lgh_usxray_t2_cont	¥
	Requisition	lgh_xray_l1_req	¥
Save pr	inter preference		
Clear a	all preferences	Reprint	Cancel

To change the printer location, from the **Output Destination** pop-up window choose new output device, the **location**, and the **type**. Click **OK** to print.

Task View		Out	put Destinatior	1	
Default Always t Always t	reat my personal default output o use the default output destination	lestina n asso	ation as the default ciated with the comp	uter that I am using	
Output Dev Favorites Filter By:	Other Output Devices	~	Device Type:	Printer	~
\$\$\$\$\$\$\$\$\$ ************	BCG Bella Coola General Ho: BCG Medical Imaging EGH Evergreen House HTH Hilltop House LGH Breath Program LGH Cardiac Home Care LGH Cardiology Lab LGH Cast Clinic	sp ^	Device Name	Location	Type
				OK	Cancel


The packet consists of three components: the **Requisition**, the **Content label** and a **Folder label**.

The Folder label does not contain a barcode and can be used to give to a porter or on other forms.



The **Content** label is placed on the back side of the requisition and the accession number on the label can be scanned.

BEBE, T	INY			
BUPHN:	9875098253	Fin Class:		
WHN:	740002057	Gender:	Female	
DOB:	10 – AUG – 1978	Age:	48 Years	
Enc:	7400000003725			
XR Abdo	men 2 Views			
Exam Dat	e: 10-AUG-201	8		
Ordering Accession	MD: Pliska, Benja 1: 112 - XR - 18	amin Tobia:	s, DEN	

The **Requisition** will print and three fields need to be completed by the technologist:

112-XF		REPRINT	Ł	LGH Lions Gate Hospital					
_			DODUN	BEBE,	TINY				
Exam:	XR Abdomen 2 Views		BCPHN:	9876098253					
Accession:	112-XR-18-1000101		DOB:	10-AUG-1970					
Research Study:			Age:	48 Years					
Isolation:			Gender:	Female					
Disease Alert:			Dosing Wt:	Ht:					
Fall Risk Score:			Enc #:	740000003725					
Patient Type:	Emergency		Primary He	alth Plan					
Patient Loc:	LGH ED								
	Room: ACWR								
Requested Date/	Time: 10-AUG-2018 10:20	Ordering Phys: Pliska, Benja	amin Tobias, Di	EN 55	197				
Priority:	Routine	Physician Phone: 604732	26333						
Transport Mode:	Not specified	Ordered By: Young,	, Gil						
Reason for Porta	able:	Provider Callback Number:							
		Ordered Date/Time: 10-AU	G-2018 10:21						
Relevant Lab	s:								
Creatinine:									
eGFR:									
INR:									
PTT:									
Allergies:									
Tech Commen	ts:								
Fluoro Time:		[
		Imaging Protocol and	Priority (Radio	ologist's Use Only)					
Images:		Imaging Protocol and	Priority (Radio Rad	ologist's Use Only) fiologist's Initials					
Images:		P1 P2 P3	Priority (Radio Rad	ologist's Use Only) fiologist's Initials pecified Date:					



1. **Technical comments** including: Anticoagulant stoppage time, patient supplied medications, medications, patient history, LMP, Pregnancy status, contrast/radiopharmaceuticals, and if shielding was used.

- 2. The Fluro time in HH:MM:SS format
- 3. The number of Images archived to PACS.

If additional comments are needed, use the reverse side of the requisition.

Practice

 Practice registering your patient in DOE adding a new outpatient encounter and creating an order with the modality your work in like US abdomen.

Key Learning Points

- You can insert today's date and time using the shortcuts T and N.
- There are usually at least two ways to access functionality within RadNet ("to do things in the system") from the icons in the menu bar at the top of the window, or by right-clicking on the item you are interested in, and choosing the action from the pop-up menu.
- If you replace an order in the same modality, the new order will retain the accession number as long as you have the Copy Accession Number to new Order box checked.
 - By modifying order details you can add additional CCs for distribution of the final report.



PATIENT SCENARIO 2

Learning Objectives

At the end of this Scenario, you will be able to:

- Access the Scheduling Appointment Book (SchApptBook)
- Set personal preferences for optimal use
- Use Appointment Inquiry
- Book appointments
- Use the Request Queue
- Schedule Outpatients and Inpatients
- Block and Unblock Schedule slots

SCENARIO

This is a step by step guided introduction to the Scheduling Appointment Book. You will be guided through a variety of tasks that are part of your daily workflow and shown how to book appointments. Follow the guidelines included to move through the scenario. Afterwards you will practice what you have learned by booking your own appointments.



Activity 2.1 – Overview of Scheduling Appointment Book

This first activity will guide you through the Scheduling Appointment Book (SchApptBook) application. This is where you will book all of the appointments for your department. Appointments can be booked from paper requisitions that will print in your department or from request queues.

- <complex-block>
 - 1. Menu Bar- Includes Task, Edit, View and Help options.
 - 2. **Toolbar-** Includes icons of additional app elements (e.g. Person Management, Request List Inquiry, Modify, Cancel, Reschedule, Print, Shuffle, Create Group Session, Swap Resources, and Exit) to facilitate accomplishing a task.
 - 3. Demographics Bar- Displays Patient's Name, Age, Date of Birth, Gender and MRN.
 - 4. **Calendar-** Assists in booking appointments by the days, weeks and months of a particular year.
 - 5. **Bookshelf** Contains the Scheduling Appointment Books that are used to schedule and manage appointments.
 - 6. Work in Progress (WIP)- An area where a partially completed appointment resides until you are ready to book and confirm it.
 - 7. **Scheduling Grid** Contains appointment slots with Resources (e.g. person, equipment, location) schedules. This is where appointments are scheduled and managed.

2 User Preferences:

Within the Scheduling Appointment Book application, there are several options which are set at the user preference level. Once these preferences are applied, the information will not need to be entered or edited in the future unless different preferences are required.

Setting Default Location/Book

1. Click **View** in the Toolbar and select **Options**.





The Options window opens which has a number of tabs. **User Defaults** is the first tab and it allows you to set a default location (refer to screenshot below). The location entered in this field will always appear in the **Appointment Location** field when scheduling an appointment. It is only appropriate to enter a default location if you schedule appointments for one location.

Options						? 🗙								
User Defaults	Appointment	Navigation	Details	Allergies	Confirm	CI∢►								
Default location:														
Default Appointm	nent Type													
Default app	pointment type synd	nym 2												
No default	appointment type s	vnonvm												
 Default app 	pointment type sync	onym:			3									
Appointment Sch	neduling Range		ppointment (detail fields:										
Days in past:	0		Person Name Appointment	e Location										
Days in future:	0		Appointment	Туре										
Allow multiple a Upon move to the Role	appointment location work in-progress, e	n values expand the tree t	o level (Defa	ult = Role):										
Amount of inactive	time (in seconds) t	pefore automatic	ally refreshin	g request lists	and queries	-								
				ОК		Cancel								

- 1. **Default Location** can be chosen from the drop-down menu. This function would be used if a user schedules consistently for one location, e.g. LGH Medical Imaging. Once this is set, it will automatically populate within the Appointment Location.
- 2. **Default Appointment Type Synonym** can be activated by selecting the associated check box.
- 3. **Appointment Synonym** can be selected from searching in the box for the desired appointment type. This option can be used if a user consistently schedules one appointment type because it will automatically default into the appointment type field.



		2018										
4		_	July	,	_	•						
Su	Mo	lu	We	Ιh	Fr	Sa						
1	2	3	4	5	6	7						
8	9	10	11	12	13	14						
15	16	17	18	19	20	21						
22	23	24	25	26	27	28						
29	30	31	1	2	3	4						
5	6	7	8	9	10	11						
_												

4. Click on the Navigation Tab. This is where you can set a default Bookshelf and Book.

Options					?	×									
User Defaults	Appointment	Navigation	Details	Allergies	Confirm Cl	►									
Default bookshe	Default bookshelf:														
<none></none>		•													
Default book:	Default book:														
	v														
- Toolbar Prefere Number of ite	ences ems to retain in most	recently displaye	d list:												
15		,,-													
V Home bu	ton returns to curren	t date													
Back/For	ward buttons retain (date context													

Default Bookshelf - Enter the name of the **Bookshelf** that you would like to default open when you log into the SchApptBook application. There is a list available to assist you in selecting a predefined bookshelf.

Default Book- Enter the name of the **Book** that you would like to default open when you log into the SchApptBook application. There is a list available to assist you in selecting a predefined book. In the example below, the default Bookshelf is the **LGH Medical Imaging Bookshelf** and the default Book is the **LGH CT Book.**

•		2018 Books Appointment																							
4 50	Mo	Tu	July Wo	Th	Fr	•	В	ooks	helf -	LGF	l Med	ical Ir	nagi	ng Be	ooks	helf								Open	
1	2	3	4	5	6	7									5 ð									Select	
8	9	10	11	12	13	14		Bool		Book	Bool	Bool		Bool	n m z e										
15	16	17	18	19	20	21		8	5 2	Щ Q	Ϋ́	- 	5 8	ЩЩ Ц	<u>s s</u>										
22	23	24	25	26	27	28				Ы	Ē	E E	Í E	E	E B										
29	30	31	1	2	3	4		Ĩ	ê P	2 4	, S P	1 2 9	3 2	ĭ d	티핑										
5	6	7	8	9	10	11		L L																	
									_																
	17-Jul-2018 - LGH CT Book																								
	LGH CT Rm 1																								
7:00	7:00 CT P3/4													<u> </u>	CT P3/4	w/o Contr	rast		ICT	FP3/4 w/o Contrast	CT I	nterventio	nal	_	
7:05	7:05 CT P3/4 w/o Contrast								F P3/4	w/o C	Contrast				- 1										
7:10															_ I.					J.		<u> </u>			
7:15	7:15 CT P2 w/o Contrast							CT P2 w/o Contrast						CT P2 w/o Contrast CT P2 w/o Contrast						1					
7:20															- 1										
7:25																									



Book Settings:

3

Book settings determine the view of the appointment book. These can be accessed by rightclicking in the scheduling grid and selecting **Book Settings** and then **View**.

THE REAL PROPERTY OF THE REAL	Actions	•		
	Add New Appointment			
CT Inpatient	Book Request			
	Confirm Request			
CT Inpatient	Remove Request			
LGH Med Ima	Recur Appointment			
	Navigation	•		
LGH Med Imag	Inquiry	•		
	Report	•		
CT Inpatient LGH Med Ima	Applications	•		
	Person	•		
	Slots	• ////////		
	Resources	• ////////////////////////////////////		
CT Inpatient	Book Settings	▶ View	Non	-proportional Single-day
LGH Med Imaging		Date and T	ime • Prop	ortional, Single-day
VALIDATE, ADAN	A CT Urgent	Properties.	Prop	onional, iviuitipie-day
CT Inpatient			Wee	k
			Mor	th

Proportional, Single-day View- This is the default and recommended view that allows the user to see all of the breaks in the day. The times are at the left-hand side of the book.

Appointment Book Properties:

Appointment book properties include settings such as the Begin and End time of the scheduling grid, the data that displays in a scheduled appointment and the time interval of the scheduling grid. Appointment book properties can be accessed by right-clicking on the scheduling grid, selecting **Book Settings** then selecting **Properties**.





General Tab



- 1. **Begin Time-** In military time, this determines the time that the appointment book will start; this crosses all books and bookshelves.
- 2. End Time- In military time, this determines the time that the appointment book will end; this crosses all books and bookshelves

NOTE: If there are any slots beyond the designated time, they will not be visible on the books. However, by using suggest, you can still schedule into these.

3. **Display fields-** These are the fields that will show in a scheduled appointment on the scheduling grid. By clicking the up or down arrows, you can change the order in which they are displayed.

Icons Tab

By selecting any of the icons listed, a symbol will appear if the criteria are met. Example: if the Slot Icon **Comments** is checked a bubble will appear on the slot if any comments are entered.

	Ap	pointm	ent Book Properties ? ×
General	lcons	Fonts	View - Proportional, Single-day
Slot icons:	omments elease Time: oup Session formation licks	5	(4) (5)
Appointme	ent icons: ergies opointment L omments oup Session otocol ecurring toose and B o Not Move gibility Statu	inking 1 look s Ambiguou	JS V
			OK Cancel



NOTE: Making changes to the default settings for this is not recommended.



Fonts Tab

Fonts as they appear in the appointment book can be changed using this tab.

Appointment Book Properties ?														
General Icons	Fonts	View - Proportional, Single-day												
Font	Default													
MS Shell Dlg														

View Proportional Single-day

	Ap	pointm	ent Book Properties 🛛 ? 🗙
General	lcons	Fonts	View - Proportional, Single-day
Display	binder 1		
Time interv 5 Column V O Cus	val: 2 Width (In Pix stom width:	^{tels)} 3	*
) Size	e to fit all, wi e to fit all	ith minimun	n width:
Start displa	ny at: 4	current dat	e start at current time
			OK Cancel

- 1. **Display binder** By checking or un-checking this option, the binder on the left side of the appointment book will be visible or not.
- 2. **Time interval-**This option determines the increments of time (in minutes) for the slots.
- 3. Custom width- This option determines the width of the slots under the resources.
- 4. **Start Display at** You can set the time and day that you wish to display when you first log on to the application.

4 Opening a Bookshelf/Book:

- 1. Select the **Books** tab, click the **Select** button.
- 2. Select the LGH Medical Imaging Bookshelf and click OK.



Books Appointment Books 1			Open
	Select Bookshelf Market Bookshelf Market Cardiogy Lab Perioperative Services Market Cardiogy Lab Ambulatory Bookshelf Market Cardiogy Lab Perioperative Services Market Cardiogy Bookshelf Market All Dupptient Crines Bookshelf Market All Crines Bookshelf Market All Crines Bookshelf Market All Crines Bookshelf Market All Crine	? ×	2018

3. Double-click on the modality **Book** where you typically work.

	2018 Books Appointment																														_				
•			July			•		Boo	ksh	elf -	LG	ΗМ	edic	all	maq	jing	j Bi	ook	she	elf												1		Open	
Su	Мо	Tu	We	Th	Fr	Sa			2			7	$ \rightarrow $					1		1,		4													
1	2	3	4	5	6	7								8			7	5	×	e ð	ð													Select	1
8	9	10	11	12	13	14		1 de la	00K	200K	ð,	Š	Book	R	Sook		δ a		Bog	e B	E E														
15	16	17	18	19	20	21			Ë	0 E	B		IM E	0	RF E	ł			E R	Car	18														
22	23	24	25	26	27	28		1 E	ĬĬ	Ë	H		1 Ho	2	Ë		Ĕ	3 1		Da	, jä														
29	30	31	1	2	3	4		Πz	Ĭ	Ĕ	2	리의	Ч	F	Ľ		i d		Ċ	J	E														
5	6	7	8	9	10	11	[<u> </u>	_					-							Ľ														
																																			_
																												24-Ju							
								L	GH	CT	Rm 1												LGH CT Oral Contrast Prep Resource												
07:0										ſ	:T P3	/4 w,	o Co	ntras	st							٦	СТО	ral Con	trast P	eparatio	n				СТ	Oral (Contras	t Preparation	٦
07:0	5 CT I	P3/4 v	/o Co	ntrast																															
07:1	0																					J													
07:1	5 CT I	P2 w/o	Contr	ast						Υ	T P2	w/o	Contr	ast								n													
07:2	D																																		
07:2	:25																																		
07:3	:30 CT P2 w/o Contrast							C	CT P2 w/o Contrast																										
07:3	(:35																																		
07:4															77.		77.			┥															
07:4		CTE)/IP//	///	////	/////	///	///	///	10	G YC	i Urg	ent	///	///	///	///																		

5 Appointment Inquiry (Schedule Inquiry)

Appointment Inquiry allows the users to view appointments in a list format. Schedule Inquiry allows you to enter the parameters required to view the schedule associated with a specific person or resource.

There are four available options for using Schedule Inquiry: *Person tab, Resource tab, Location tab and Request List tab.* Each of these is described below, along with the available elements for each tab.

The Appointment Inquiry can be accessed in two different ways.

1. Click the Appointment Inquiry icon (eye icon) located at the top of your screen.



2. Right-click anywhere on the scheduling grid, select **Inquiry**, and then select **Appointment Inquiry**.



Actions	+	
Add New Appointment		
Book Request		
Confirm Request		
Remove Request		
Recur Appointment		
Navigation	•	
Inquiry	•	Appointment View
керон		Appointment History View
Applications	ŀ	Appointment Inquiry
Person	F	Request List Inquiry
Slots		View Appointment Information
Resources	• "	
Book Settings	•	

3. The Appointment Inquiry window appears on your screen.

1	2	3	4	Age:
Person	Resource	Location	Request Li	st
Inquiry: Person	Schedule Ind	quiry - Standa	rd	~
Person: Start date 27-Jul-20	e: 018 📮 🗸	Start time:	▲ ▼	
End date		End time: 2355	▲ ▼	
Fi	nd	Clear		Close

- 1. **Person Inquiry Tab** Use this inquiry to view information (such as confirmed appointments, no-show, inquiry with orders) associated with a specific patient in the SchApptBook.
- 2. **Resource Inquiry Tab-** Use this inquiry to view information (such as displaced appointments, open slots available, booked outside of slot) associated with a specific resource in the SchApptBook.
- 3. **Location Inquiry Tab-** Use this inquiry to view information (such as location with person name, check-in) associated with a specific location in the SchApptBook.
- 4. **Request List Inquiry Tab-** Use this inquiry to view information (such as request list by location, cancellation list, and request queues) associated with a specific request list in the SchApptBook.

Select the appropriate parameters to run any of the above inquiries to view results.



Activity 2.2 – Appointment Scheduling

There are several different methods for scheduling an appointment within the Scheduling Appointment Book application. This section will discuss each of these methods and explain when one method should be used over the others. Use the outpatient on your training card to follow along.



Pre-requisite Steps for Booking an Appointment

These are the pre-requisite steps for booking an appointment prior to selecting one of the three methods.

1. Click the **Appointment** tab.

2. The first few fields for the required information appear in the window. You may begin to schedule the appointment.



NOTE: Mandatory fields are marked with red asterisks (*) and highlighted in yellow meaning you will need to complete these fields in order to move to the next step in scheduling an appointment.

- 3. Click the Ellipsis button beside the Person name field .
- Search for the patient, by entering the PHN, then click OK (if you do not have a PHN, search by partial last name and first name or date of birth and gender).
 If you have found the correct patient, click only ONCE on their name to select, then click OK.

3)	
BC PHN: [MRN:	No persons found.



NOTE: If Yes is entered into the Interpreter Required? An interpreter must be scheduled. Interpreters are not scheduled in the CIS.

NOTE: Refer to Registration's EMPI Reference material to learn about requesting a new PHN for a brand new patient. Approximately 99% of all **BC** Residents are registered in the EMPI.



5. The Organization window appears. Click on the Ellipsis button.

🖪 Organization 🛛 💽						
Please select the facility where you want to view person aliases.						
Facility Name Facility Alias						
[
Facility:						
OK Cancel						

6. Scroll down through the list of the clinics/departments until you see **LGH Med Imaging**, select it, and then click **OK**.

B	Organization	×					
Please select the aliases.	e facility where you want to view perso	on					
Facility Name	Facility Name Facility Alias						
LGH Medical	Imaging						
LGH Medical	Imaging						
Facility:							
LGH Medical Imaging							
	OK Can	cel					

- 7. The EMPI window will appear momentarily as your patient is checked against the EMPI database.
- 8. The Future Requests/Appointments window will appear for the patient if they have appointments that are booked in the future. Click **OK** to close the window.

	Request Action	Appointment Typ	Earliest Request	Date	Latest Request	Date	Created By	Date Created			
<	e object accourt	iment(s):									
	Current State Confirmed	Appointment Type CT Inpatient	Location LGH Med Imaging	₽ 	n Date/Time ug-2018 - 09:15	End 08-A	Date/Time ug-2018 - 09:3	Created By 30 TestUser. C	Jerk-RadNet	Date Created 26-Jul-2018 - 1	5.26

- 9. The patient's name will now display in the **Person Name** field.
- 10. Click the **Ellipsis** button beside the *Appointment Location* field and double-click **LGH Medical Imaging** to select.

NOTE: The Appointment Location may be defaulted based on user preferences.

11. Select the Ellipsis beside the Appointment Type field and double-click on an appointment



type to select or start typing the appointment type and press enter.

Books Appointment		
Person name:		
	Appointment Type Help ?	×
*Appointment location:	Annaistment Tune	^
LGH Med Imaging	CT Abdomen	
*Appointment type:	 CT Abdomen Pelvis 	
CT	= CT Ablation	
	= CT Angio Body = CT Angio Extremity	

12. Once an Appointment Type is selected, additional fields will appear.

NOTE: This list of fields is referred to as Accept Format Fields.

- 13. Complete any mandatory fields then click the **Move** button to move the appointment into the **Work In Progress (WIP)**. The appointment guidelines open, read and click **OK**.
- 14. The Appointment Attributes window opens. Click the correct order from the *Optional* tab, so it displays in the top box.
- 15. Add a *Reason For Exam,* check the *priority* and select a *MI Assigned Priority* if protocolled by the radiologist. Click **OK**.

Image: Wallbart, ADAM Details Orders Resource List Guidelines Appointment Eligibility	
08Aug 2018	^
CT Abdomen w/ + w/o Contrast Routine]
Image: Second	
Optional Search Existing Orders Privileges AOS Required <	
CT Abdomen w/ Contrast CT Abdomen w/o Contrast Provider Caliback Number:]
Pregnart:	×

2 Two Methods of Booking an Appointment

Once the appointment information is in the WIP, use any of the following two methods (Drag & Drop and Suggest) to move the request into a Pending status on the scheduling grid.

Drag and Drop Method

The drag and drop functionality is a quick and simple method for scheduling single appointments. It should be used when you need to schedule an appointment in a pre-determined date and time. This method works best for departments that do not book appointments too far into future.

Highlights:

- Quick method for booking a single appointment.
- Allows you to schedule an appointment to a pre-determined date and time.
- Works well for clinics that do not book appointments far in advance.



1. Left-click on the selected resource (the resource directly below the clinic name) and **drag the cursor** to the appropriate resource and start time.

• 2018 •	Books Appointment			Work in progress
Konguit Auguit Auguit Su Su Mo Tu Wo Th Fs Sa Sa Mo Tu Wo Th Sa Sa Sa Sa Mo Tu Sa Sa Sa Sa Sa Sa Mo Tu Sa Sa Sa Sa Sa Sa Mo Tu Sa	CC Previder 1 CC Previder 2 CC Previder 3	ୁ ଜା ଆଜ	Nove + Net Cear	Construction Construction
		International Contract Contract Contract	Pro Hed	
12.36 12.36 12.36 12.740 12.40 12.40 12.40 12.40 12.40 12.40 12.40 12.40 12.40 12.40 12.40 12.40 12.40 13.40 1		CT lager. ST lager ST lager ST lager. ST lager.		₽.

2. Release the mouse button, the Schedule window will display on the screen. Verify that the Resource and the time slot fields are correct. After reviewing the information, click **OK**.

	Resource: [IGH CT Rm 1 V Default slot:
	<none> v</none>
	Time:
	1020
12:30 CT P2 w/ Contrast 12:35	Duration:
12:40 12:45 CT ED//P	Hour(s) 15 Minutes Day
	Distinguish setup and cleanup durations
12.555 13.000 CT ED/IP	Apply Duration Change to Order
13.05	OK Cancel

NOTE: You can change the duration of the exam at this time.

3. The appointment will show in the slot in a pending state, which will be denoted by the red books in the **WIP** and yellow background.

- 2010 F	Books Appointment			Work in progress:		
4 August +	CC Provider 1	*	Moon b	🖶 🖸 VALDATE ADAM	Schedule	
Su Mo Tu We Th Fr Sa	CC Proder 2	Net	Not Sec Classification Converting	Confirm		
3 3 3 1 2 3 4				Recur		
12 13 14 15 16 17 18		Cear		Summer		
19 20 21 22 23 24 25		Alterna Contraction		oograa		
26 27 28 29 30 31				a Patient	Piequest	
1.5. 0. 5. 5. 5. C. C.					haet	
Ave free		LGH CT Re 1			·	
12:25 CT P2 w/ Contrast		CEUpen				
12:30 CT P2 w/ Contrast		CT Urgent				
12.35						
12.45 CT ED/IP		T xt types				
12:50 VALIDATE ADAM						
13:00 CT Abdomen 13:00 LIGH Med Imaging		CT Uppert				
13.05						

4. The appointment will appear in the scheduling grid in a Pending state.



NOTE: If you attempt to Drag your appointment to a room that is not set up for that type of exam (i.e. w/ Contrast, w/o Contrast etc.), you may have Slot not Valid pop-up occur. Please see overriding a timeslot below for information on this.



Suggest Method

The system can suggest available times at which an appointment can be scheduled based on date and time parameters that are set. This provides available date and time options without having to search through the scheduling grid. This method is recommended for those areas where available appointment times are limited and also for more complicated appointments.

Highlights:

- Helps you to find the FIRST available appointment at the clinic.
- Allows you to set a date range for the appointment search.
- Avoids scheduling conflicts (resources/patients will never be doublebooked).

With your appointment in the Work In-Progress area,

1. Click the Suggest button to open the Suggested Schedules window.

Work in progress:	
🖃 🌍 VALIDATE, ADAM	Schedule
'⊟≪ CT Abdomen	0.5
🖮 🛅 Current Schedule	Contim
៉ 📶 LGH Med Imaging	Recur
LGH CT Rooms w/ Contrast	
Patient	Suggest
	Request
	Insert

2. Check the set Preferences and modify if needed (for example: the number of options returned), click on the **Preferences** tab in the Suggested Schedules window.

6						Su	ggested Sc	hedu	les					? ×
• \$	Patient VALIDATE, ADAM	Appointment Location LGH Med Imaging	Appointment Type CT Abdomen	Primary Order CT Abdomen w/ +	w/o Contrast	Schedule	d Date/Time	Patient I 15 Minu	Duration tes					
Suggest C Number of s Number of c	riteria Preference suggestions to return : days in date range:	es		10 • 30 •		Pat Dur 15 Minutes 15 Minutes 15 Minutes 15 Minutes	Pat Date/Time 08-Aug-2018 - 08-Aug-2018 - 08-Aug-2018 - 08-Aug-2018 - 08-Aug-2018 -	13:45 14:00 14:15 14:30	Person VALIDATE, ADAM VALIDATE, ADAM VALIDATE, ADAM VALIDATE, ADAM	Appt Date/Time 08-Aug-2018 - 13:45 08-Aug-2018 - 14:00 08-Aug-2018 - 14:15 08-Aug-2018 - 14:30	Appt Type CT Abdomen CT Abdomen CT Abdomen CT Abdomen	Resource LGH CT Rm 1 LGH CT Rm 1 LGH CT Rm 1 LGH CT Rm 1	Appt Loc LGH Med Imaging LGH Med Imaging LGH Med Imaging LGH Med Imaging	Primary Order CT. Abdomen w/ + w/o Cor CT. Abdomen w/ + w/o Cor CT. Abdomen w/ + w/o Cor CT. Abdomen w/ + w/o Cor
Default time Success rat Acceptable Mon	range: io: time variation: Tue N	Ned Thu	0800	2355 × 100 × hour v Sun		15 Minutes 15 Minutes 15 Minutes 15 Minutes 15 Minutes 15 Minutes	08-Aug-2018 - 08-Aug-2018 - 08-Aug-2018 - 08-Aug-2018 - 08-Aug-2018 - 08-Aug-2018 -	14:45 15:00 15:15 15:15 15:30 15:45	VALIDATE, ADAM VALIDATE, ADAM VALIDATE, ADAM VALIDATE, ADAM VALIDATE, ADAM VALIDATE, ADAM	08-Aug-2018 - 14:45 08-Aug-2018 - 15:00 08-Aug-2018 - 15:15 08-Aug-2018 - 15:15 08-Aug-2018 - 15:30 08-Aug-2018 - 15:45	CT Abdomen CT Abdomen CT Abdomen CT Abdomen CT Abdomen CT Abdomen	LGH CT Rm 1 LGH CT Rm 1	LGH Med Imaging LGH Med Imaging LGH Med Imaging LGH Med Imaging LGH Med Imaging	CT Abdomen w/ + w/o Cor CT Abdomen w/ + w/o Cor
Do not allow multiple secondary suggestions First available with sequencing Display day of week with date-firme Optimize patient time Return suggestions in														
Next	Next Day	r Clear	Select		٢								ОК	Cancel

- 3. Click Suggest for the system to display suggested times that the appointment could be scheduled.
- 4. If the suggested times do not work, click **Next** to display the next available times.
- 5. If the suggested dates do not work, click **Next Day** to display the available times for the next day.
- 6. Once you have found a suggested date and time to use, click **Select**. A red checkmark will appear next to the selected date and time.



7. Click OK to close the Suggested Schedules window and schedule the appointment.

0					S	uggested Sched	ules					2	×
Patient /	opointment Location GH Med Imaging	Appointment Type CT Abdomen	Primary Order CT Abdomen w/ •	w/o Contrar	Scheluk st 09-Aug-2	ed Date/Time Patier 2018 - 16:00 15 Me	t Duration nutes						
Suggest Criteria Preferences					Pat Dur	Pat Date/Time	Person	Appt Date/Time	Appt Type	Resource	Appt Loc	Primary Order	^
Number of suggestions to return : Number of days in date range:		(aaa) (#)	10 🗘	*	15 Minutes 15 Minutes 15 Minutes 15 Minutes	09-Aug-2018 - 13:30 09-Aug-2018 - 13:45 09-Aug-2018 - 15:15 09-Aug-2018 - 15:45	VALIDATE, ADAM VALIDATE, ADAM VALIDATE, ADAM VALIDATE, ADAM	09-Aug-2018 - 13:30 09-Aug-2018 - 13:45 09-Aug-2018 - 15:15 09-Aug-2018 - 15:15	CT Abdomen CT Abdomen CT Abdomen CT Abdomen	LGH CT Rm 1 LGH CT Rm 1 LGH CT Rm 1 LGH CT Rm 1	LGH Med Imaging LGH Med Imaging LGH Med Imaging LGH Med Imaging	CT Abdomen w/ + w/k CT Abdomen w/ + w/k CT Abdomen w/ + w/k CT Abdomen w/ + w/k	0
Default time range: Success ratio: Acceptable time variation:		0	100 🔮		15 Minutes 15 Minutes 15 Minutes 15 Minutes	09-Aug-2018 - 17.30 09-Aug-2018 - 17.30 09-Aug-2018 - 18.15 10-Aug-2018 - 08.15 10-Aug-2018 - 11.30	VALIDATE ADAM VALIDATE ADAM VALIDATE ADAM VALIDATE ADAM	09-Aug-2018 - 17:30 09-Aug-2018 - 17:30 09-Aug-2018 - 18:15 10-Aug-2018 - 08:15 10-Aug-2018 - 11:30	CT Abdomen CT Abdomen CT Abdomen CT Abdomen	LGH CT Rm 1 LGH CT Rm 1 LGH CT Rm 1 LGH CT Rm 1	LGH Med Imaging LGH Med Imaging LGH Med Imaging LGH Med Imaging	CT Abdomen w/ + w/s CT Abdomen w/ + w/s CT Abdomen w/ + w/s CT Abdomen w/ + w/s	0
Mon Tue We	sd Thu suggestions	Fn Sa	Sun		15 Minutes 15 Minutes 15 Minutes 15 Minutes	10 Aug-2018 - 15 15 10 Aug-2018 - 15 45 10 Aug-2018 - 15 45 10 Aug-2018 - 16 00 10 Aug-2018 - 17 30	VALIDATE, ADAM VALIDATE, ADAM VALIDATE, ADAM VALIDATE, ADAM	10 Aug-2018 - 15:15 10 Aug-2018 - 15:15 10 Aug-2018 - 15:45 10 Aug-2018 - 16:00 10 Aug-2018 - 17:30	CT Abdomen CT Abdomen CT Abdomen CT Abdomen	LGH CT Rm 1 LGH CT Rm 1 LGH CT Rm 1 LGH CT Rm 1	LGH Med Imaging LGH Med Imaging LGH Med Imaging LGH Med Imaging	CT Abdomen w/ + w/s CT Abdomen w/ + w/s CT Abdomen w/ + w/s CT Abdomen w/ + w/s	0
First available with sequencing Display day of week with date to Optimize patient time Return suggestions in	me 5 v	day v		8 8 8 8	15 Minutes 15 Minutes 15 Minutes 15 Minutes 15 Minutes	10.Aug-2018 - 18.15 13.Aug-2018 - 08.15 13.Aug-2018 - 08.15 13.Aug-2018 - 11.30 13.Aug-2018 - 15.45 13.Aug-2018 - 15.45 13.Aug-2018 - 15.45	VALIDATE ADAM VALIDATE ADAM VALIDATE ADAM VALIDATE ADAM VALIDATE ADAM	10-Aug-2018 - 18:15 13-Aug-2018 - 08:15 13-Aug-2018 - 08:15 13-Aug-2018 - 11:30 13-Aug-2018 - 15:15 13-Aug-2018 - 15:45 13-Aug-2018 - 15:45	CT Abdomen CT Abdomen CT Abdomen CT Abdomen CT Abdomen	LGH CT Rm 1 LGH CT Rm 1	LGH Med Imaging LGH Med Imaging LGH Med Imaging LGH Med Imaging LGH Med Imaging LGH Med Imaging	CT Abdomen w/ + w// CT Abdomen w/ + w//	0
Next Next Day	Cear	Select		¢					200-00		ОК	Cancel	•

NOTE: Please ensure you note the time/date of the appointment. Depending on your clinic, you might have available appointments outside of the work day. Your calendar may not be set up in a 24 time clock and you will not see the yellow unconfirmed appointment.

3 Overriding a Time Slot

If you use Drag and Drop the exam into an area that is prescheduled for a different type of procedure, A warning message, *Slot Not Valid* displays. Click **Override** if appropriate.

Slot Not Valid			— ×
MR ED/IP is not a valid slot for LGH M	R Rm 1.		
Cancel	Override	Gu	idelines

You are required to enter an Override reason.

- 1. Select an Override Reason from the drop-down list and
- 2. Select OK.

Slot Not Valid	x
Override	
*Override Reason:	
_Scheduling Error	-
Consent not Received	
Delay Treatment	
_Order Modification	
_Scheduling Error	
Unavailable Equipment	
_Unavailable Nurse	
_Unavailable Provider	
_Unavailable Staff	
_Unavailable Technologist	
SN - Linking Appointments	
SN - Scheduling Need	
SN - Scheduling PAC	
	_
OK Cancel	



NOTE: If the duration of the exam is longer than the duration of the slot or if the offsets between multiple appointments don't fit into the slot you may receive more than one override message.

Confirming an Appointment

4

Once the appointment moves to Pending (yellow) status in the scheduling grid (using any of the above two methods), follow the below steps to **Confirm** and create a **Pre-outpatient Encounter** for the appointment.

- 1. Click the <u>Confirm</u> button beside the WIP to confirm the appointment. The Confirm window will display a summary of the appointment including any patient preparations/instructions.
- 2. Click **OK** in the Confirm window.

m		Confirm		? 🗙
Name: VALIDATE, ADAM		BC PHN: 10760002141	Gender: Male	Person Comments:
Preferred Name:	MRN: 760002141	DOB: 15-Aug-1938	Language:	Location: LGH 6E/6EL/05
Disease Alert: None	Process Alert: Falls Risk	Age: 79 Years	Interpreter Required:	Preferred Phone: (604) 123-4587
VALIDATE, ADAM	Summary General Resource View	Guidelines Notification	Conversation Summaries Itinerarie	s Locks Eligibility Booking Notes
Get Med Imagin	VALIDATE, ADAM Allergies: Allergies 09-Aug-2018 - 16:00 15 Minute Orders: CT Abdomen w/ + w/o Contrast Preparations: Your exam is booked at Lion's Gal Please arrive at the hospital 15 mi allow time to find parking and regis Please bring your BC services can	Med Rec Nbr: es CT Abdomen te Hospital - Medical Imagin nutes before your schedule ter In Medical Imaging. d OR your CareCard with a	760002141 LGH Med Imaging LGH ng Department. d appointment time (this is the time government issued photo ID with yn Q	CT Rm 1 at the top of the page on the left), to bu to your appointment. tions Print Print ABN OK Cancel

The Encounter Selection window will open with the patient's previous and current encounters.

3. Click the Add Enc button to create a new encounter for this appointment.

The Available Conversations window appears.

4. Select Pre-Register Outpatient. Then OK.

Available Conversations	×
Please select the conversation you would like to use:	
l	•
Pre-Register Outpatient	
Pre-Register Patient To A Bed	

The External MPI window appears momentarily to ensure you have the most up-to-date demographics on the patient. It will not find your patient in the Train environment. A pop-up may occur telling you the patient already has an active encounter. Click OK.

The Pre-Register Outpatient window will appear for you to complete the pre- registration. Only the **Patient** and **Encounter Information** tabs are necessary to complete a preregistration.



5. If you are not in contact with the patient to confirm the information, leave the Pre-Reg

Status as Incomplete Status: verify all the information, update the Pre-Reg Status to **Complete**.

6. Verify the demographic information in the Patient Information tab on every visit.

ALERTS Patient Information Encounter Information Insurance Insurance Summary Additional Contacts

- 7. Click on the Encounter Information tab.
- 8. Verify that the Building and Unit/Clinic are correct. In the Location section, the Facility is auto-populated.

— Location ———					
Facility:		Building:		Unit/Clinic:	
LGH Med Imaging	-	LGH Med Imaging	•	LGH Med Imaging	-

9. In the Current Encounter Information section, complete the mandatory fields as below:

Encounter Type: Pre-Outpatient

Medical Service: Medical Imaging





NOTE: The Reason for Visit carries over from the appointment.

The other fields are not mandatory on the Pre-outpatient Encounter.



NOTE: the Estimated Arrive Date and Time are auto-populated from appointment date and time.

- 10. Click **Complete** to finish.
- 11. The Pre-Register Outpatient window displays. Verify and click OK.



NOTE: Some exams will not require an encounter until check in. Refer to the help topic on CIS Help (sentinel nodes, fine wires).



5 Adding a Patient to a Request Queue

When a request for an exam requires protocolling and tracking it may need to be added to the request queue before the appointment can be scheduled. Each exam modality and priority has separate request queues. These are accessed from the **Appointment Inquiry icon** (eyeball) located at the top of your screen and when ready, they can be scheduled directly from this area.



In order to place patients on the request queues, follow the steps to book an appointment 1-14 in section 1. Once your client is moved into the WIP you would normally schedule using Drag and

Drop or Suggest, but instead we will click the **Request** button Request to add to the queue.

The Request to Book window opens and defaults to the Scheduling Criteria with the Request List Selection. The Selected Request Lists box will automatically default with the MI Modality Initial Queue defaulted.

If you want to change the request list, you can select the Show All button below and use the arrows to move your selection over. Find the list you want to default your patient to and click OK. The patient will be removed from the WIP and will now be on that Request Queue for scheduling at a later date.

We will learn more about Request Queues and how to schedule off of a request queue in Scenario 4.

•		Request for Book		? ×
Name: VALIDATE,	ADAM	BC PHN: 10760002141	Gender: Male	Person Comments:
Preferred Name:	MRN: 760002141	DOB: 15-Aug-1938	Language:	Location: LGH 6E/6EL/05
Disease Alert: None	Process Alert: Falls Risk	Age: 79 Years	Interpreter Required:	Preferred Phone: (604) 123-4587
- VALIDATE, ADAM	Scheduling Criteria Summary	General Details Orders Guidelin	es Notification Conversation S	ummaries Eligibility Booking Notes
⊞Q2 US Breast	Appointment Date Requested date range:	08-Aug-2018	▲ V 07-Se	ap-2018
	O Request in:	1 🗘 Day	s v From: 08-AL	ıg-2019 🔹 ✓
	Mon Tu	ue Wed	Thu Fri	Sat Sun
	Appointment Time	0800	▼ 1800	
	Time restrictions:	AM Only		•
	Request List All request lists:		Selected request lists:	
			MI US Initial Queue	
			4	
			et Default	
	Show all			
	J=L			OK Cancel

Practice

Using your outpatient on your training card,

 Please book 3 separate commonly used appointments in your respective modality (XR, CT, MR etc.). Use Drag and Drop to schedule one appointment. Then use the Suggest method to schedule the second appointment. Add the third appointment to the modality Initial queue.



```
6
```

Inpatient Placeholder – please use your patient from Scenario 1.

1. Follow the steps (1 to 14) from Step 1 for Booking an Appointment to fill in the Person Name and Appointment Location fields in the accept format.

Books Appointment		Work in progress:	
*2		UALIDATE, ADAM	Schedule
* <u>P</u> erson name:	Move 🕨	US Inpatient	Confirm
VALIDATE, ADAM	 Next	Current Schedule	Committ
*Appointment location:	 	🗇 🗐 LGH Med Imaging	Recur
LGH Med Imaging	Clear	EGH US/IK Kms Inpatient	Current
*Appointment type:	Allergies		Suggest
US Inpatient			Request
US Inpatient			

2. Complete the below mandatory fields and click **Move** button:

Appointment Location: LGH Med Imaging

Appointment Type: i.e. XR Inpatient; CT Inpatient; MR Inpatient etc.

Comments: add any applicable comments (exam name)

3. Click Move to move the patient into the WIP.



NOTE: If you are booking a Nuclear Medicine appointment for an inpatient you must book it the regular way with the full requested NM appointment type (i.e. NM Parotid etc.)

4. Use either **Drag & Drop** or **Suggest** button to book a **Pending** appointment. Click **Confirm** button.

Work in progress:	
🖃 🧒 VALIDATE, ADAM	Schedule
ia ◆ US Inpatient iaiiii Current Schedule	Confirm
LGH US/IR Ros Innation	Recur
eoriosintins inputent 	Suggest
	Request
	Insert

- 5. Click **OK** to close the Confirm window.
- 6. Review the summary of the Patient and click OK.

•		Confirm			?	×
Name: VALIDATE, /	ADAM	BC PHN: 10760002141	Gender: Male		Person Comments:	
Preferred Name:	MRN: 760002141	D08: 15 Aug 1938	Language:		Location: LGH 6E/6EL/05	
Disease Alert: None	Process Alert: Falls Risk	Age: 79 Years	Interpreter Require	d: ·	Preferred Phone: (604) 123-45	587
I VALIDATE ADAM	Summary General Resource View	Guidelines Notification	Conversation Summaries Itir	neraries Locks	Eligibility Booking Notes	
G Inpatient GH Med Imagin GH US Rm 1 VALIDATE, AL	VALIDATE, ADAM Allergies: Allergies	Med Rec Nbr:	760002141			
	08-Aug-2018 - 07:00 40 Minut	es US Inpatient	LGH Med Imaging	LGH US Rm 1		
< >				Options	Pirt Pirt ABN .	
					OK Cancel	



7. The appointment is booked with an Inpatient encounter.

08:20	VALIDATE, ADAM
08:25	US Inpatient
08:30	LGH Med Imaging
08:35	lump
08:40	Confirmed
08:45	30 Minutes



Blocking Schedules

There are times when you will need to block off a schedule so that appointments are not booked into those times.

To block just a few slots, you can use the appointment type Blocked Time. When you have confirmed it, the slot will turn grey and cannot be scheduled into.

- 1. Follow the steps (1 to 4) from Step 1 to go to the Appointment tab.
- 2. Select an Appointment Location from the drop-down list (**NOTE**: Skip the Person Name field).
- 3. Select Blocked Time in the Appointment Type field.
- 4. Add any appropriate comments in the Comments field in the Accept Format Fields.
- 5. Click on the Move button to move the appointment to Work in Progress (WIP) area.

Scheduling Scheduling Appendment Book				
and Box Diew Hirlp				
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► fack + -+ -> [2] /3				
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	- MER			
4 2017 i 80	olts Appointment		Weight an inclusion	
i Hevenber i Ta	ana nane		Meve a	
Su Mo Tu We Th Pr Sa			Bl Current Schedule	
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5 5 7 8 9 10 11	an Gan		Cee Se	
			and the second sec	
1 7 1 1 1 1	Lawrence in the second s		Test Contraction	
	used the			

- 6. Use either Drag & Drop or the Schedule button option to block the time on calendar.
- 7. Click **Confirm** to complete booking the Blocked Time appointment.



NOTE: If you want to block multiple slots, click next to move another blocked slot into the WIP until you have the correct number of slots in the WIP. Confirm each blocked slot.



PATIENT SCENARIO 3

Learning Objectives

At the end of this Scenario, you will be able to:

- Modify an Order within SchApptBook
- Reschedule an appointment
- Check In a patient
- Cancel an Appointment

SCENARIO

This part of the course is a step by step guided introduction to making changes within SchApptBook. You will be asked to accomplish a variety of tasks that are part of your daily workflow, and you will be guided through them. Follow the guidelines included to move through the scenario.



Activity 3.1 – Modifying Appointment Information, Order Details and Patient Information

Modifying Information

1

There are three different types of modifications that can be made. You can modify Appointment information such as the Referring Provider, Referral Received Date, Reason for Visit, and Special Instructions, etc.

You can also modify the Order as long as it stays within the same modality. As you learned in Activity 1.4, if you must change modalities, you will have to cancel the appointment or order in the Request Queue and reorder it either via DOE or SchApptBook.

You can also modify Patient information such as their Date of Birth, Last Name, and Phone Number, etc.

Modifying the Appointment Information

1. Right-click the appointment, select Actions, and then Modify.

									mnn.					
												Confirm		
						_					<u> </u>	Contact		
		2018	;		Þ	Books	Appoir	ntment				Modify		
		Augu	st		•	Person	name:					Reschedule		
Mo	Tu	₩e	Th	Fr	Sa							Hold		
30	31	1	2	3	4							Cancel		<u> </u>
6	7	8	9	10	11	Аррон	ntment loc	ation:				No Show		
13	14	15	16	17	18	LGH M	led Imagin	g				Check In		
20	21	22	23	24	25	* <u>A</u> ppoi	ntment typ	e:				Check Out		
27	28	29	30	31	1							Patient Seen		
3	4	5	6		8							Batch Reschedule		
												Request	•	
1	VALIE	DATE.	ADAN	1								Verify Reorder		
	MR P	elvis										Group Session	•	
	LGH I	Med Im	aging									l'al.		
	pain											LINK		
	Confir	med						Actions		•		Unlink		
and the second	<u>30 Mi</u>	nutes					0707	Add Nev	v Appointment		1010			onon
								Navigati	on	+	 			
<u>.</u>								Inquiry		×				

2. The Modify window will pop up allowing you to make any changes.

D		Modify		f 🗾 🗙
Name: VALIDATE	, ADAM	BC PHN: 10760002141	Gender: Male	Person Comments:
Preferred Name:	MRN: 760002141	DOB: 15-Aug-1938	Language:	Location: LGH 6E/6EL/05
Disease Alert: None	Process Alert: Falls Risk	Age: 79 Years	Interpreter Required:	Preferred Phone: (604) 123-4587
C VALIDATE, ADAM	General Summary Details Modify geason: Comments:	Orders Guidelines Notification	Conversation Summaries Itineraries	Locks Booking Notes



3. Click the **Details** tab to make changes to the appointment information.

Ge	neral	Summary	Details	Orders	Guidelines	Notification	Conversation Summaries	ltineraries	Locks	Booking Notes		
*(rdering	Priority:										^
F	outine										~	
*e	GFR R	lesults Been F	Received?:									
Y	es										~	
*	leques	t Received Da	ate/Time:									
0	3-Aug-2	2018					🛉 🗸 1439				•	
М	Timed	Duration:										
3	0										~	

NOTE: It is not possible to modify the Appointment Type, Location, or Patient Name. These changes will require the apppointment to be rescheduled.

4. You can type in any additions you need or delete information, then click **OK** to save.

Modifying the Order

To modify the order (i.e., the Radiologist asked for the order to be changed to expand the view or select a more specific exam), click on the **Orders** tab.

General	Summary	Details	Orders	Guidelines	Notification	Conve	rsation Summaries	ltineraries	Locks	Booking Notes	
Options MRI I MRI I MRI I	ATE, ADAM Pelvis w/ Cor al Search I Pelvis w/ + w/r Pelvis w/ Cont Pelvis w/o Cor	Existing Ord D Contrast rast	ers Privileş	ges AOS	Required		Requested Start D 08:Aug-2018 Priority: Routine Reason for Exam: pain MI Assigned Priorit P3 Request Received 08:Aug-2018 Special Instructions Provider Callback N	y: Date/Time: / Notes to Sche	l l l l l l l l l l l l l l l l l l l	1439	
										ОК	Cancel

1. You can see options in the *Optional* window below. You can find your new exam there and double-click to replace the exam. Once the exam moves to the working window. You must select a new MI Assigned Priority for the new exam.

NOTE: If you do not see the exam you need in the Optional tab, you can select Search and find your order within the same modality this way.



2. Right-click the old exam and select Cancel and add a Cancel Reason for the first exam.

General	Summary	Details	Orders	Guidelines	Notification	Conver	sation Summaries	ltineraries	Locks	Booking Notes	
CSTBU US Hi	ILDMI, TEST	SCHEDULI	NG				*Cancel Reason:				~
US Hi	ip Bilateral	2									3
Optiona	I Search E	Existing Ord	ers Privileg	ges AOS	Required						
US Hij US Hij US Hij	p Bilateral p Left p Right										
						1					
									[OK	Cancel

Modifying Patient Information

To modify patient information, you will need to highlight that person's appointment,

1. Right-click, go to **Person**, and select **Modify Person**.

		Actions	+			
		Add New Appointment			View Person	
		Book Request			Modify Person	
		Confirm Request			Person Comments	
		Remove Request			View Encounter	
		Recur Appointment			Add Encounter	
		Navigation	•		Modify Encounter	
		Inquiry	•		Encounter Comments View All Encounters	
		Report	+			
		Applications	•		Allergies Post Encounter Payment	
	Г	Person	•		Post Guarantor Payment	
		Slots	•]
		Resources	۲			
		Book Settings	•	····		

- 2. Select Facility Name in the Organization window. The EMPI window briefly launches.
- 3. On your screen you will see the system loading patient information, and opening the Modify conversation. When the **Add Person** window opens, you can make any changes that are required.



Medical Record Number: Last Name: First Name: Middle Name: Preferred Nam 760002141 VALIDATE ADAM Middle Name: Preferred Nam Maiden Name: Date of Birth: Birth Time: Age: Gender: 15-Aug-1938 V 12:30 79Y Male	e: Previous Last Name: Validate BC PHN: ✓ 0750002141
Medical Record Number: Last Name: First Name: Middle Name: Preferred Nam 760002141 VALIDATE ADAM Middle Name: Preferred Nam Maiden Name: Date of Birth: Birth Time: Age: Gender: 15-Aug-1938 V 12:30 79Y Male	e: Previous Last Name: Validate BC PHN: 0760002141
Adden Name: Date of Birty Birth Time: Age: Gender: 15-Aug-1938 V 12:30 V 79Y Male ALERTS Patient Information Insurance Additional Contacts Address and Contact Information Address Information: Previous Addr - Clear (c): Mailing Addr - Clear (c): Temporary/Secondary Addr - Clear (c):	BC PHN: 0760002141
ALERTS Patient Information Insurance Additional Contacts Address and Contact Information Address Information: Previous Addr - Clear (c): Mailing Addr - Clear (c): Temporary/Secondary Addr - Clear (c):	
Address and Contact Information Address Information Address Information: Previous Addr - Clear (c): Mailing Addr - Clear (c): Temporary/Secondary Addr - Clear (c):	
Permanent Address: Previous Address: Mailing Address (If different from Permanent); Temps 2142 West Broadway Add Address Add Address Add Address Add Address Canada Canada Canada Canada Canada Canada	prary/Secondary Address: ddress
Preferred Phone: Home Phone Number: Mobile Phone Number: Work Phone Number: Work Extension: Home Phone Number v [604]1234587 [] ·	Alternate Phone Number:
Email Address:	
Araital Status: Religion: VIP - Personal Information Marital Status: VIP - Person Lev VIP - Person Lev VIP - Person Lev	et 🗸
Primary Care Provider (PCP): Train, GeneralMedicine	
	Complete Cance

4. After you have made your changes, click **Complete** to save.



Activity 3.2 – Rescheduling a Patient's Appointment

Rescheduling a Patient

There are multiple methods for rescheduling an appointment.

- 1. Right-click on the appointment within an Appointment Inquiry.
- 2. Right-click on the appointment within the Scheduling Grid area.
- 3. Drag-and-Drop into WIP.

Right-click on the appointment within an Appointment Inquiry

- 1. Open the Schedule Inquiry window by clicking on the eyeball icon in the Toolbar.
- 2. Search by the patient name using a Person Inquiry Person Schedule Inquiry Standard
- Select the Inquiry type of your choice, fill out the appropriate search criteria and press the FIND button.
- 4. Highlight the appointment you wish to reschedule, right-click and choose **Reschedule**.

Person Resource Location Request List		BEG DATE	DURATION	STATE	APPT TYPE	REQ DOCTOR	RESOURCE	
		08-Aug-2018 - 08:20	30	Confirmed	US Inpatient		LGH US Rm 1	
Inquiry:		08-Aug-2018 - 09:15	15	Confirmed	CT Inpatient		LGH CT Rm 1	
Person Schedule Inquiry - Standard	~	08-Aug-2018 - 09:45	30	Confirmed	MR Pelvis		I CU MD D. 1	
	_	09-Aug-2018 - 16:00	15	Confirmed	CT Abdomen	Confin	m	
Person:						Conta	:t	
VALIDATE, ADAM						Modify		
						widding		
Start date: Start time:						Resche	dule	
08-Aug-2018 😴 🗸 0000 👻						Hold	16	
End date: End time:						Cance		
						No Sh	214/	
						NO SH		
						Check	In	
						Check	Out	

- 5. The Future Requests/Appointments window may display. Press **OK** to move to the next step.
- 6. The Existing Encounter warning may display if your appointment currently has an active encounter associated. Press the **YES** button to retain the encounter association.



7. The Appointment Attributes window will display. Press the **OK** button within this window. Make sure there is only one order in the top window.



8. The appointment information will now display within the WIP.

Work in progress:	
UNIDATE, ADAM	Schedule
	Confirm
■ · · · · · · · · · · · · · · · · · · ·	
i umaing LGH Med Imaging	Recur
LGH MR Rms w/ Con Enterography	Suggest
Patient	
	Request
	Insert

- From this point, you will find a new available appointment time using one of the methods previously described. Find a new appointment time and press the **Confirm** button. The Confirmation window will display. Press the **OK** button.
- 10. The Reschedule window will display. Select a reason from the dropdown and press the **OK** button.

*Reason: Auto Discharge Cancellation List Booking Cancellation List Booking Cancellation List Booking Cancent not Received Delay Treatment Deam Replaced Incomplete Prep Incomplete Requisition Job Action Leave of Absence No Show Order Contraindicated Order Modification Patient Refused Patient Discharged Patient Discharged Patient Refused Patient Refused Patient Refused Patient Refused Patient Refused Patient Refused Patient Maited To Long Patient Refused Patient Wated Too Long Patient Maited Too Long Patient Maited Too Long Incovide Reguest Scheduling Eror Surgery Rescheduled Unavailable Refused Unavailable Reguest Unavailable Remode	8	Reschedule	? 🗙
Juto Discharge ▲ _Cancellation List Booking ▲ _Care Transfer _ _Consent not Received _ _Delay Treatment _ _comn Replaced _ _incomplete Requisition _ _Job Action _ _Order Konganotte _ _Patient Medited to Hospital _ Patient Requestd _ _Patient Requestd _ <	*Reason:		
Auto Discharge			~
Cancellation List Booking Care Transfer Consent not Received Delay Treatment Down Replaced Incomplete Prep Incomplete Prep Incomplete Requisition Job Action Leave of Absence No Show Order Contraindicated Order Modification Patient Admitted to Hospital Patient Admitted to Hospital Patient Refused Patient Refused Patient Refused Patient Refused Patient Unable to Tolerate Patient Change Transfator Request Scheduling Error Surgery Rescheduled Transfator Request Unavailable Equipment Unavailable Equipment Unavailable Environment Patient State	_Auto Discharge		^
Care Transfer Consent not Received Delay Transfer Consent not Received Delay Transfer Consent not Received Discrete Requisition Locomplete Requisition Locomplete Requisition Lave of Absence Loave of Absence Dorder Modification Patient Admitted to Hospital Patient Discharged Patient Refused Patient Refused Patient Refused Patient Refused Patient Refused Patient Valted Too Long Patient Refused Scheduling Error Surgery Rescheduled Transfetor Request Scheduling Error Surgery Rescheduled Transfetor Request Unavailable Request	_Cancellation List Booking		
Consent not Received Delay Treatment Lown Replaced Incomplete Prep Incomplete Requisition Job Action Leave of Absence No Show Order Contraindicated Order Modification Patient Addited to Hospital Patient Discharged Patient Discharged Patient Refused Patient Refused Patient Refused Patient Refused Patient Refused Patient Refused Patient Wated To Long Provider Request Scheduling Error Surgery Rescheduled Irenplac Change Irenplac Change Irenplac Dang	_Care Transfer		
Delay Treatment Disom Replaced Theomplete Requisition Job Action Leave of Absence No Show Order Contraindicated Order Modification Patient Admitted to Hospital Patient Admitted to Hospital Patient Refused Patient Refused Patient Refused Patient Refused Patient Unable to Tolerate Patient Unable to Tolerate Scheduling Error Surgery Reschedueld Tremplate Change Translator Required Unavailable Equipment Unavailable Equipment Unavailable Environ	Consent not Received		
Even Replaced Incomplete Requisition Job Action Leave of Absence No Show Order Contraindicated Order Motification Patient Admitted to Hospital Patient Life Refore Seen Patient Refused Patient Refused Patient Life Refore Seen Patient Refused Invalidation Refused Unavailable Refore Refused Unavailable Refore Refused Unavailable Refore Refuse Unavailable Refore Refore Unavailable Refore Refore	_Delay Treatment		
Incomplete Requisition Job Action Job Action Leave of Absence Jorder Contraindicated Order Modification Patient Modification Patient Discharged Patient Discharged Patient Discharged Patient Refued Patient Refued Patient Refued Patient Requested Patient Wated Too Long Provider Request Scheduling Error Surgery Rescheduled _Translator Required _Unavailable Equipment _Unavailable Environ	_Exam Replaced		
Incomplete Requisition Job Action Leave of Absence No Show Order Contraindicated Order Modification Patient Admitted to Hospital Patient Admitted to Hospital Patient Regred Patient Regred Patient Regred Patient Regresed Patient Regresed Patient Regresed Patient Unable to Tolerate Patient Unable to Tolerate Patient Unable to Tolerate Patient Unable to Tolerate Scheduling Error Surgery Reschedueld Itemplate Change Itemplate Change Unavailable Equipment Unavailable Equipment Unavailable Equipment	_Incomplete Prep		45
Job Action Leave of Absence No Show Order Contraindicated Order Motification Patient Lischerged Patient Lischerged Patient Lischerges Seen Patient Refused Patient Refused Patient Refused Patient Refused Patient Refused Patient Refused Patient Refused Scheduling Eror Surgery Rescheduled Imavailable Equipment Unavailable Rume Unavailable Rander	Incomplete Requisition		
Leave of Absence Jorder Contraindicated Order Modification Patient Admitted to Hospital Patient Discharged Patient Left Before Seen Patient Left Before Seen Patient Refused Patient Refused Patient Refused Patient Nable to Tolerate Patient Wated Too Long Provider Request Scheduling Error Surgery Rescheduled _Translator Required _Unavailable Equipment _Unavailable Patient _Unavailable Patient	_Job Action		
No Show Order Contraindicated Order Modification Patient Admitted to Hospital Patient Left Before Seen Patient Reguest Patient Reguested Patient Unable to Tolerate Patient Unable to Tolerate Patient Wated Too Long Provider Request Scheduling Error Surgery Reschedueld _Translator Required _Unavailable Equipment _Unavailable Equipment _Unavailable Envider	Leave of Absence		
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Order Modification Patient Admitted to Hospital Patient Left Before Seen Patient Left Before Seen Patient Reguested Patient Requested Patient Requested Patient Request Scheduling Error Scheduling Error Scheduling Error Linavailable Requement Linavailable Rupement Linavailable Rupement Linavailable Rupement	_Order Contraindicated		
Patient Admitted to Hospital Patient Discharged Patient Discharged Patient Reguested Patient Reguested Patient Nate to Tolerate Patient Wated Too Long Patient Wated Too Long Provider Request Scheduling Error Surgery Reschedueld _Translator Required _Unavailable Equipment _Unavailable Patient Linavailable Patient	_Order Modification		
Patient LBischarged Patient LBischarged Patient LBischarged Patient LBischarged Patient Refused Patient Refused Patient Refused Patient Valeed Too Long Provider Request Scheduling Error Surgery Rescheduled Translator Required Unavailable Equipment Unavailable Remoder	_Patient Admitted to Hospital		
Patient Pregnancy Status Unknown Patient Reguested Patient Refused Patient Refused Patient Nable to Tolerate Patient Wated Too Long Provider Request Scheduling Eror Scheduling Eror Translator Requeed Translator Requeed Unavailable Reguement Unavailable Patient Unavailable Patient	_Patient Discharged		
Patient Pregnancy Status Unknown Patient Preguested Patient Requested Patient Unable to Tolerate Patient Valled Too Long Provider Request Scheduling Error Surgery Rescheduled Translator Required Unavailable Equipment Unavailable Nurse Unavailable	_Patient Left Before Seen		
_ratert Netused Patient Requested Patient Requested Patient Valted Too Long Provider Request Scheduling Error _Surgery Rescheduled _Translator Required _Unavailable Equipment _Unavailable Required _Unavailable Patient _Unavailable Patient	_Patient Pregnancy Status Ur	iknown	
Pratert Helpested Pratert Helpeste to Tolerate Provider Request _Scheduling Error Surgery Rescheduled _Template Change _Translator Requed _Translator Requed _Unavailable Equipment _Unavailable Patient _Unavailable Patient	_Patient Refused		
_raterit Unable to Tolerate _Paterit Water Too Long _Provider Request _Scheduling Error _Surgery Rescheduled _Template Change _Translator Required _Unavailable Equipment _Unavailable Nurse _Unavailable Nurse _Unavailable Nurse	_Patient Requested		
_ratert value loc long _rovider Request _Scheduling Error _Surgery Rescheduled _Translator Required _Unavailable Equipment _Unavailable Retert _Unavailable Patient _Unavailable Patient	Patient Unable to Tolerate		77
_rrower nequest _scheduling Eror _Surgery Rescheduled _Template Change _Translator Required _Unavailable Equipment _Unavailable Patient	_Patient waited 100 Long		
_coreoling_biol _surgery Rescheduled _Template Change _Translator Required _Unavailable Equipment _Unavailable Patient _Unavailable Patient	_Provider Request		
_ouger resoluteuteut Trensitet Change _Transitor Required _Unavailable Equipment _Unavailable Patient _Unavailable Patient	_Scheduling Error		
tempate change translator Required Unavailable Equipment Unavailable Patient Unavailable Patient	Tomplate Change		
Unavailable Equipment Unavailable Patient Unav	Translator Required		
Unavailable Lapapiera Lunavailable Nurse Unavailable Patient Unavailable Patient	Linavailable Equipment		
_Unavailable Patient	Linavailable Nuree		
Linavailable Provider	Linavailable Patient		
	Linavailable Provider		

11. Your appointment will now appear in a Confirmed status in the new appointment time and the previous appointment time will be removed.



NOTE: The attached encounter will be updated with the new date and time.

Right click on the appointment within the scheduling grid area

1. You may also reschedule appointments directly within the grid area. To accomplish this, right-click on the appointment, go to **Actions**, and then click **Reschedule**.



IE MD Control	Actions	Con	firm	
ID MR Cardiac	Add New Appointment	Con	tact	
25	Rook Request	Mod	dify	
30	Confirm Request	Reso	thedule	
35	Remove Request	Hold	d	-
0	Recur Appointment	Can	cel	
IS MR w/ Contrast	Recur Appointment	No S	Show	
55	Navigation) Che	ck In	
10	Inquiry	> Che	ck Out	
15	Report	 Datio 	ent Seen	
0	Applications	▶ Bate	h Reschedule	
5	-	- Dute		_
20	Person	Requ	uest 🕨	
D MB w/ Contract	Slots	Verif	ły	
	Resources	Med	Nec Check	
MR Pelvis	Book Settings	+ Lock	k	
IS LGH Med Imaging		Unic	 ock	
i0 pain				-
5 Confirmed		Shuf	tte	
U 30 Minutes		Swa	p Resources	

2. From the WIP, continue to reschedule the appointment as previously shown.

Drag-and-Drop into WIP

1. To reschedule an appointment Drag & Drop into the appointment into the WIP.

4 2010 →	Books Appointment	Work in progress:
August Jugust Jugust 10 Tu We Th Fr Sa 10 30 31 1 2 34 4 12 13 14 15 16 17 10 12 13 14 15 16 17 10 19 20 21 22 23 34 1 2 3 4 5 6 7 8	Image: construct Declined Image: construct Declined Image: construct Declined Image: construct Declined <th>C VALDATE ADMA CON REPAirs CON REPAIRS</th>	C VALDATE ADMA CON REPAirs CON REPAIRS
	2018 - LGH MR Nes w/ Con Enterography LGH MR Nes 1	
30 MR w/ Contrast 33 €VALUATE, ADAM 40 MR Petvis 45 LGH Med insigng 50 pain 155 Confirmed 00 80 Minutes		

2. From the WIP, continue to reschedule the appointment as previously shown.



NOTE: You can also use this function if you need to un-check in an appointment that was checked in incorrectly.



Activity 3.3 – Checking In a Patient



Checking in a Patient

Checking-in appointments activates the order and assigns an accession number so that the exam can be started in RadNet. This is also a good way to keep track of patients who have shown up for their appointments and those who have not.

There are multiple options for Checking-In appointments, however the following is the one you will use most often:

Right-click on the appointment within the scheduling grid area

1. Right-click the appointment you want to check in, select Actions then Check In.



The Check In window will display, click **OK**.

2. Select **Register Outpatient** from the drop-down list and click **OK**.

54		Check In		7 100								
Name: VALIDATE, /	ADAM	BC PHN: 10760002141	Gender: Male	Person Comments:								
referred Name:	MRN: 760002141	D08: 15-Aug-1938	Language:	Location: LGH 6E/6EL/05								
isease Alert: None	Process Alert: Falls Risk	Age: 79 Years	Interpreter Required:	Preferred Pho	ne: (604) 123-4587							
VALIDATE, ADAM NM Bone Marrow Is	General Summary Details Ord	ers Guidelines Notification	Conversation Summaries Itin	eraries Locks Eligibility	Booking Notes							
	08-Aug-2018	1 ×	1535									
	Trading locator:											
	<none></none>											
	Comments: A Availa	able Conversations	*									
	Person Name Eric Type VALIDATE, ADAM Pre-Odpatient											
	Request Information Medical record requested: No	Guar Pint Enc 1	Pat. Mew	Modfy Set Enc	Charges							
c >												



- 3. The EMPI will search for the patient. Click OK.
- 4. The Register Outpatient Conversation window opens.
- 5. All the available mandatory fields will display in yellow. In order to Check-In a patient for an appointment, a **full registration of the patient information is needed**.
- 6. In the *Encounter Information* tab select **Outpatient** for Encounter Type and complete the rest of the mandatory fields.

ALERTS Patient Information	Encounter Information Insurance In	nsurance Summary Additional Cor	ntacts
Encounter Type:	Medical Service: Medical Imaging	Reason for Visit: pain	Referral Source: Arrival by Ambulance: Source of ID: V V V
Facility:	Building: / LGH Med Imaging V	Unit/Clinic: LGH Med Imaging	Patient Accom Requested: Accom Form Signed: Isolation Precautions:
Attending Provider:	Primary Care Provider (PCP):	PCP Verified?:	Referring Provide:

- 7. Complete the *Insurance* tab by adding an **Insured Resident**, **No** *Accident Related Visit* and **MSP** for *Health Plan, see card.*
- 8. Click **Complete**. If you missed any mandatory fields it will take you to the missed field.

LGH NM Inj Rm 1	LGH NM
07:40 3 NM MPI Rest Inj 07:45	4 NM MPI Rest Inj
07:50 MI Block	MI Block
07:55	
08:00 VALIDATE, ADAM	6 NM MPI Rest Inj
08:05 NM Bone Marrow Inj	

The appointment is now in a *Checked In* status and the appointment will turn green in the Scheduling Appointment book.



NOTE: The Outpatient Encounter Types will be automatically discharged (autodischarged) by the system. The auto-discharge will occur <u>one day after</u> the registration date, and will be backdated to 23:59 on the registration date.



Activity 3.4 – Mark a No Show and Cancel an Appointment

1 Mark an Exam as a No Show

Mark a patient as No-Show if they do not show up for their appointment. This will put them back on the request queue and save you from having to re-enter all of the appointment and encounter information you have already created.

1. Right-click on the patient select Actions and then No Show.

	- 10 H	× 📼	<u> </u>	Ξ.	00		······································		
Nan	ne:								Confirm Contact
									Modify
			0010	_			Rooks Appointm		Reschedule
•			2018			•	BOOKS Appointin		Hold
4			Janua	ry T.	-	•	*Appointment type:		Cancel
Su	Мо	Iu	We	Ih	Fr	Sa			No Show
31	1	2	3	4	5	6	Appointment location		
7	8	9	10	11	12	13			Check In
14	15	16	17	18	19	20			Check Out
21	22	23	24	25	26	21	Person name:		Patient Seen
20	23	50	7	0	4	10			Batch Reschedule
4	5	0		0		10			Request +
									Verify
4			LGł	I XR	Rm	4	LGH XR Rm 5		Med Nec Check
	10:3	5						1	Lock
T	10:40	XF	R Any				XR Any		Unlock
-	10:4	5							
L	10:50								Shuttle
T	10:5	5							Swap Resources
-	11-00								Reorder
4	11:0								Group Session
	11.0	line.							Cali A
T	11.1.1		STPF DAm		VII, TE	= 5 }			LINK P
-	11:18		R AN	-	A	tions	•	_	Unlink
	11:20	J 			A	dd New	Appointment		
1	11-2	5 K							

A No-Show window will appear.

2. Select the number of No Shows for the patient under **Scheduling No Show #** (e.g. If this is their first time No Show-ing, select 1).

🔁 No Show															? *
	TEO	TOPOT							MBN:	7000025	583		DOB: 22-Fel	o-1980	
Name: CSTPRODM	, IES	TCAST	CLINIC						Age:	37 Years			Sex: Male		
	General	Summany	Details	Ordorr	Suidelines	Notification	Conversation	ummarias	Hiperaries	Locks	Rooking Notes				
	General	Summary	Details		Juidennes	Notification	Conversation .	Jummaries	tuneranes	LOCKS	booking Notes				
	*Schedu	ling No Show	#:												
	cl														•
	2														
	4														
															*
	Person	Name		Enc Type											
	CSTP	RODMI, TESTO	LASTCLINIC	Pre-Outpatie	ent										
												Mour		Modfu	Cancel Eng
												view		modary	Cancer Life
														OK	Cancel



3. Click on the **Orders** tab and select the **Cancel Reason** as **Patient No Show**. Click **OK** and the patient's timeslot will appear in grey.

IMe: CSTPRODM	1, 159	ICASI	CLINIC				Age:	Age. 37 Years		Sex: Male		
【 CSTPRODUNL TESTCAST 业 ◆ XR Any	General CSTPI XR C Option XR A XR A XR A XR A XR A XR A XR A XR A	Summary KODMI. TEST alcaneus Lef Search. Jai Search. Johnen 2 Vie Johnen 2 Vie John	Details ICASTCLINK ft Existing Orde was and Ones le View Jar Joint Blat Jar Joint Blat Jar Joint Blat	Orders C C C C C C C C C C C C C C C C C C C	Guidelines	Required	Conversation Summaries	Rimeranies Accessed Patients Accessed Patients Accessed Patients Accessed Patients Pati	Locks Passon: to Show my Heractic Order moved placed or ischarged Schow or ischarged Schow Ischarged Schow Ischarged Schow Ischarged Schow Ischarged Schow Ischarged Schow Ischarged Schow Ischarged Schow Ischarged Schow Ischarged Schow Ischarged Schow Ischarged Schow Ischarged Schow Ischarged Schow Ischarged Schow Ischarged Ischarged Schow Ischarged	Booking Notes		ŀ

2 Cancelling an Appointment

Right-click on the appointment within the Appointment Inquiry

- 1. To cancel an appointment from an Inquiry, first open the **Schedule Inquiry** window by clicking on the eyeball icon in the Toolbar.
- 2. Use one of the many available Inquiries to find the appointment:
 - Search by the patient name using a Person Inquiry Person Schedule Inquiry Standard
- 3. Select the Inquiry type of your choice, fill out the appropriate search criteria and press the **Find** button.
- 4. Highlight the appointment you wish to cancel, right-click and choose **Cancel**.

Person Resource Location Request List		BEG DATE	DURATION	STATE	APPT TYPE	REQ DOCTOR
		08-Aug-2018 - 08:00	10	Checked In	NM Bone Marrow Inj	
Inquiry:		08-Aug-2018 - 08:20	30	Confirmed	US Inpatient	
Person Schedule Inquiry - Standard	~	08-Aug-2018 - 09:15	15	Confirmed	CT Inpatient	
_		08-Aug-2018 - 09:45	30	Rescheduled	MR Pelvis	
Person:		08-Aug-2018 - 10:35	30	Confirmed	Carlor	
VALIDATE, ADAM		09-Aug-2018 - 16:00	15	Confirmed	Confirm	
a					Contact	
Start date: Start time:					Modify	
08-Aug-2018 🚽 🖌 0000					Reschedule	
End data: End time:					in the	
					Hold	
					Cancel	
					No Show	

5. The Cancellation window will display. Select an appropriate reason in the **Cancel Reason** drop-down and press **OK**.



Genera	Summary	Details	Orders	Guidelines	Notification	Conversation Summaries	ltineraries	Locks	Booking Notes		
*Cancel <u>r</u>	eason:										
_Provide	er Request										7
Comment	s:										
										1	
											-
Persor	Name	Enc Type									
VALID	ATE, ADAM	Inpatient									
											1
							View		Modify	Cancel Enc	
									ок	Cancel	

The appointment is now in a cancelled state. If there is an order associated to the appointment, the order will get auto-cancelled.

Discharge the Encounter

6. The next step is to Cancel or Discharge the encounter which is covered in Registration's Foundation training.



NOTE: Cancel the encounter if there are no orders/documents associated with it and discharge the encounter if there are orders /documents associated with it.

Right-click on the appointment within the scheduling grid area

You may also cancel appointments directly within the grid area. To accomplish this,

1. Right-click on the appointment; click Actions, then Cancel.

٩	August						Bookshelf - LGH Medical Ima			
Su	Mo	Tu	We	Th	Fr	Sa		_	Hold	
29	30	31	1	2	3	4			Cancel	
5	6	7	8	9	10	11	ook Sook Sook Sook		No Showง	
12	13	14	15	16	17	18			Check In	_
19	20	21	22	23	24	25	H H H H H H H H		Check Out	
26	27	28	29	30	31	1			Patient Seen	
2	3	4	5	6	7	8			Batch Reschedule	
									Request •	
									Verify	
9:50	MR	w/Co	ntrast						Med Nec Check	
0.25	1								-	
0:33	1 S	VALIE	DATE,	ADAM					Link	
0:40		MR P	elvis							
0:45		LGH I	Med Im	aging			Actions		Unlink	
0:50		pain					Add New Appointment			
0:55		Confin	med				Deale Dearent			
1:00		30 Mir	nutes				BOOK Request			

2. The Cancellation window will display. Follow the steps (4 to 6) from Appointment Cancellation Option 1 to complete cancelling an appointment.



Practice:

Please use your 3 pre-booked exams to practice the following:

- 1. Practice modifying your patient's appointment information and modifying the order itself.
- 2. Reschedule the patient for the next day.
- 3. Check-in the patient from the second appointment.
- 4. Cancel their appointment.

Key Learning Points

- When you want to modify an exam in the request queue list that changes the modality, it is mandatory to cancel the exam and schedule under the new appointment type.). When you move a request from one queue to another, it does not automatically remove it from the prior queue.
- The scheduling window using suggested timeslots has customizable preferences. You can attend to patient's scheduling needs by customizing the search for a slot based on the parameters the patient may have. The system will suggest timeslots that correspond to those parameters
- Required order/scheduling details must be filled in before you can place/ schedule an order.
- When you reschedule an appointment, keep the same encounter for the new date and time

If you schedule an appointment incorrectly, please see the QRG on how to resolve this issue.


PATIENT SCENARIO 4

Learning Objectives

At the end of this Scenario, you will be able to:

- Modify appointments Request Queues location
- Scheduling appointments from the Request Queue

SCENARIO

This part of the course is a step by step guided introduction to Request Queue in SchApptBook. You will be asked to accomplish tasks that may be part of your daily workflow, and you will be guided through them. You check the queue as a part of your daily tasks and begin to schedule one of the appointments for your patient. Follow the guidelines included to move through the scenario.



Activity 4.1 – Request Queues

In Activity 2.1 box 5, we added a patient to a Request Queue. Now we will learn how to move patients between queues and schedule an appointment from the Request Queue.

Orders that come in as a Future Order (excluding most of XR) land in the respective modality Initial Request Queue. Requests can either be scheduled directly from the Initial Queue or can be moved to another Request Queue.

1 Moving between Request Queues

To move the exam between Request Queues, from SchAppBook, select the Request List

Inquiry Icon 💷 in the top toolbar.

This will take you into the Request List where you can select the appropriate Queue and location to work from.

Request List	
Inquiry:	
Request List by Location	~
Request List Queues:	
	~
Location type:	
Ambulatory(s)	~
Location:	
LGH Med Imaging	~

2

To move a patient between Queues after they have been assigned a priority, there are two tasks you must complete:

Use the outpatient that was added to the **Initial Queue** from Activity 2. Their new assigned Priority is **P2**. You need to move them to the Modality P2 Queue.

- 1. Right-click your patient and select Modify.
- 2. Open the **Orders** tab and change their MI Assigned Priority from Unassigned to **P2**.
- 3. Select OK.

VALIDATE, ADAM	*Requested Start Date/Time:	
	08-Aug-2018	-
MRI Pelvis w/ Contrast	*Priority:	
	Routine	v
	*Reason for Exam:	
	pain .	++
	*MI Assigned Priority:	
	P3	×
	P3 P3	~
Optional Search Existing Orders Privileges AOS Required	P3 P	•
Optional Search Existing Orders Privileges AOS Required	P3 12 12 12 12 12 12 12 12 12 12 12 12 12	•
Optional Search Existing Orders Phylioges AOS Plegured	P3 P1 P3 P4 P3 P4 P3 P4 P3 P4 P3 P4 P3 P3 P3 P3 P3 P3 P3 P3 P3 P3	•
Dotional Search Existing Orders Privileges AOS Required MRI Pelvis w/ > w/s Contrast MRI Pelvis w/ Contrast MRI Pelvis w/ Contrast	P3 P1 P3 P4 P3 P4 P3 P3 P3 P3 P3 P3 P3 P3 P3 P3 P3 P3 P3	•
Dational Search Existing Orders Privileges AOS Required MRI Revis w/ - w/o Contrast MRI Revis w/ Contrast MRI Revis w/o Contrast	P3 P1 P3 P4 Research Usastigned Usastigned Usastigned	>
Dational Search Existing Orders Privileges AOS Required MRI Review /- w/o Contrast MRI Review // Contrast MRI Review /o Contrast	P3 P3 P3 P4 P4 P4 P5 P4 P5	



Modify the actual request to move them to a different queue.

1. Right-click the patient and select **Modify Request**.

Action MRN Person Name Appointment Type Order Priority Received Date Requested Date Encounter Type F Book 760002006 MITECH, MICHAEL CT Abdomen CT Abdomen w/o Contrart Double 14 Aug 2010 - 08:00 Outpatient a Image: Confirm		Age:									
Book 760002006 MITECH, MICHAEL CT Abdomen CT Abdomen w/o Contract Deating 14 Aug 2012 - 08:00 Outpatient c Confirm Contact Modify c c c c Hold Contact Contact Contact Contact Contact	Reason for Exa	Encounter Type	d Date	Requested	Received Date	Priority	Order	Appointment Type	Person Name	MRN	Action
Cancel Cancel Add New Appointment Complete Request Modify Request	abd pain	Outpatient	110 - 08:00	ent	firm tact ihedule d cel New Appointme oplete Requect dify Request	Con Con Moo Hold Can Add	CT Abdomen w/o Contra	CT Abdomen	MITECH, MICHAEL	760002006	Book

The Modify Request window opens into the Request List tab. You will see your patient on your modality's Initial Queue in the Selected Request List.

Request List Gen	eral Request	ed Action D	letails	Scheduling Criteria	Notificatio
All Request Lists:				Selected Request List:	
Waitlist Waitlist by Prov	ider	^		MICT Initial Queue	
MI BD Initial Que	eue				
MICT P1 MICT P2			4		
MICT P3		×			

In the left box titled All Requests List are the other requests lists you are able to select from.

- 2. Move your patient to the new list by clicking and using the arrows to move it to the Selected Request List.
- 3. Move your patient off the current list by moving them off the Initial Queue using the arrow.
- 4. Click **OK** to save.

H		Modify Request		? ×
Name: MITEC	H, MICHAEL	BC PHN: 9860002006	Gender: Male	Person Comments:
Preferred Name:	MRN: 760002006	DOB: 13-Aug-1938	Language:	Location: LGH 6E/6
Disease Alert: None	Process Alert: Falls	. Age: 80 Years	Interpreter Required:	Preferred Phone: (6
E- G MITECH, MICH	IAEL Request List en (Book) All Request Waitlist b MI BD Init MI CT P1 MI CT P3 MI CT P4 MI FC Init <	General Requested Actio	n Details Scheduling Criter	ia Notification
				OK Cancel

Your patient will now be moved off the Initial Queue and into the P2 Request Queue.



Activity 4.2 – Scheduling from a Request Queue

Schedule from a Request Queue

Now that the patient has been protocolled and put on the correct P2 Request Queue, the appointment can be scheduled.

1. Right-click on the patient's name in the Request Queue and select **Schedule**.



- 2. Appointment Guidelines will appear. Read through these and then click OK.
- 3. The Appointment Attributes window will appear with yellow mandatory fields. Complete these as per your modality.
- 4. SchApptBook will open and the patient will be in the WIP.
- 5. Schedule your patient using the **Suggest** and confirm their appointment.
- 6. Ensure you select Add Enc to create a Pre-Register Outpatient encounter.

Key Learning Points

- When you move a request from one queue to another, it does not automatically remove it from the prior queue.
- Right-click the order from the queue to schedule an appointment.



PATIENT SCENARIO 5

Learning Objectives

At the end of this Scenario, you will be able to:

- Schedule a Multi-modality appointment
- Schedule an appointment that crosses departments

SCENARIO

In the following two activities you will need to schedule a series of different types of Nuclear Medicine appointments. The appointments will be scheduled on the same patient, and you will be able to build on previously acquired knowledge in accomplishing the tasks.



Activity 5.1 – Schedule a MultiModality Appointment

1 Book a Multimodality Appointment

Use the same patient. Click the **Appointment** tab to start booking a **NM CSF Leak/IR Lumbar Puncture** at LGH Med Imaging department.

1. Complete the Appointment details with the information given.

Books Appointment		
*Person name:	 ^	Move 🕨
	 ľ	Next
LGH Med Imaging		Clear
*Appointment type:		Allergies
NM CSF Leak/IR Lumbar Puncture		
	*	

2. Move your patient into the WIP.

The Appointment Guidelines window will open. This explains the procedure necessary to select the appropriate RF Injection order before scheduling.

3. Click Close.

8	Appointment Guidelines	?	×
[LGH Med Imaging] - VALIDATE, ADAM			~
All NM Rm 1 and 2 components in the prot Pharmaceutical/Treadmill orders MUST be	ccol MUST be scheduled in the same NM room. Also, 1 and 2 day scheduled in the same NM room.	MPI Rest and	d
Consult with NM Supervisor before schedu radiopharmaceutical.	ing, rescheduling and canceling to coordinate advance ordering a	nd canceling	of
After printing the summary page, highlight the numbers will be listed).	ne NM telephone number in the patient preparations (2 or more boo	king phone	
			× .
		Close	,

- 2 The Appointment Attributes window opens
 - 1. Highlight the NM CSF Inj/IR Lumbar Puncture.
 - 2. Ensure you are open to the Orders tab.
 - 3. Fill out any yellow mandatory fields.
 - 4. Click OK.



NOTE: You may have to add more detailed orders from the Optional/Search window depending on the exam



8		Aj	pointment Attril	outes		? ×
VALIDATE, ADAM	Details Order	Resource List Guidelin	es Appointment	Eligibility		
IGH Med Imagina IGH	VALIDATE, AD/ IR Lumbar PL NM CSF Leak	M	AOS Required			
	-				ОК	Cancel

- 3 Your patient is in the WIP area. The appointment appears with all the rooms listed and is ready to be scheduled.
 - 1. Click the Suggest button to find an appointment for your patient.
 - 2. The Suggested Schedules window opens with all the necessary components preselected.
 - 3. Change your Suggest Criteria as necessary and click **Suggest** to populate potential appointments in both the **NM and RF** rooms.
 - 4. Click OK.

4		5	uggested	Sched	ules						?
Patient VALIDATE, VALIDATE, VALIDATE, VALIDATE, VALIDATE,	Appointment Location ADAM LGH Med Imaging ADAM LGH Med Imaging ADAM LGH Med Imaging ADAM LGH Med Imaging ADAM LGH Med Imaging	Appointment Type NM CSF Leak/IR Lumbar Punctun NM CSF Inj/IR Lumbar Puncture NM CSF Leak 4 Hr NM CSF Leak 24 Hr NM CSF Leak 48 Hr	Primary Ord	er Sch ak 09-	neduled Date/Tim Aug-2018 - 07:00	e Patie 1 Ho 1 Ho	ent Duration pur(s) pur(s)				
Suggest Criteria Pre Appointment Date Date range: Schedule in: Date restrictions:	ferences	▼ 31-Oct-2018 ▼ From: 09-Aug-2018 ↓ ▼ ▼		'at Dur	Pat Date/Time	Person	Appt Date/Time	Appt Type	Resource	Appt Loc	Primary Orde
Appointment Time Time range: Time restrictions: Schard lie as viet with	0800 AM Only	Sat Sun Exception	•								
 Schedule as visit with Override suggested d Schedule multiple per 	ate and time sons to mixed Group Sessions	udy V									

5. You will return to the WIP window and **confirm** your appointments.



NOTE: To see the times and rooms make sure that the rooms are expanded by clicking the + sign.

- 6. The Summary of Appointments window will open. Once you have reviewed it, click **OK**. The Encounter Selection window opens.
- 7. Click **Add Enc** to create a new **pre-recurring encounter** for this appointment. Associate the same encounter with each component of the scheduled appointment.

NOTE: If the patient has an active inpatient or emergency encounter, ensure to choose that encounter, if it will be performed on that encounter.

Ģ	8			E	ncounter Selection			? ×
	Encounter Number	Enc Type	Disch Date	Admit Type	Facility	Nurse Unit	Encounter Prsnl	Provider Name
	760000002141	Inpatient			LGH Lions Gate	LGH 6E	Attending Provider	TestUser, GeneralMe
	760000010038	Pre-Recurring			LGH Med Imaging	LGH Med Imaging		
	<						1	>
	Modify	Add Enc					ОК	Cancel

8. Check the **RF** and the **NM books** on the appropriate dates to see the appointments.





Activity 5.2 – Scheduling a Recurring Appointment Across Departments

Now let's book a NM MPI Rest and Treadmill 1 Day for your outpatient.

- 1. Click on the Appointment tab and complete the mandatory fields for this exam.
- 2. Click **Move** to bring your patient into the WIP.



1

NOTE: If you type NM and the ellipses beside appointment type, more NM exams will populate.

3. Fill out mandatory information in the Appointment Attributes window. Click on **NM MPI Stress Injection 1 day/ Card** which has two components (2). One of these is a NM order (NM Myocardial Perfusion Treadmill), while the other is a Cardiology order (Graded Exercise Test) (2). Because the Graded exercise order belongs to a different department, the reason for procedure (3) in this case is a drop-down menu to choose from, unlike the MI procedures reasons that are free text.

8	Appointment Attributes	? ×
VALIDATE, ADAM	Details Orders Resource List Guidelines Appointment Eligibility	
 WM MPI Rest and Treadmill 1 Day □ LGH Med Imaging □ WM MPI Rest Inj 1 Day □ WM MPI Rest Scan □ WM MPI Stress Inj 1 Day/ □ WM MPI Stress Scan 	VALIDATE, ADAM Graded Exercise Test NM Myocardial Perfusion Treadmill Routine Reason for Procedure (multi-select):	
()	Optional Search Existing Orders Privileges AOS Required Patient has Pacemaiser: No Patient has ICD: No ICD Shock Zone (in BPM): Patient on Oral Anticoagulants: No Optional Search Existing Orders Privileges AOS Required Patient has ICD: No ICD Shock Zone (in BPM): Image: Comparison of the image of the im	▼ ▼ ▼
	ОК	Cancel

4. Select a **Reason for Procedure** to proceed with the appointment booking. Click **OK**. You can click other for the NM MPI reason for procedure.

Chest Pain	
Arrhythmia(s)	
Cardiac Rehab Assessment	
Dyspnea or Shortness of Breath	
Palpitations	
Pre-operative evaluation	
Pre-Transplant Assessment	
Syncope or Pre-syncope	
Post Procedure	
Post Operative	
Functional Capacity	
Other (please specify)	



6					Suggested	Schedules					? ×
	Patient	Appointment Location	Appointment Type		Primary Order	s	Scheduled Date/Time	Patient	t Duration		
00 m ∎ 00 00	VALIDATE, ADAM VALIDATE, ADAM VALIDATE, ADAM	LGH Med Imaging LGH Med Imaging LGH Med Imaging LGH Med Imaging	NM MPI Rest and Treadmill 1 Da NM MPI Rest Inj 1 Day NM MPI Rest Scan	y Graded Evercise	NM Myocardial Perfusio	on Rest					
4	VALIDATE, ADAM VALIDATE, ADAM	LGH Med Imaging	NM MPI Stress Scan	alaueu Exercise	www.wyocardiar.Pendsk	on neadmin					
Suggest C	riteria Preference	es			Pat Dur	Pat Date/Tim	e Person		Appt Date/Time	Appt Type	Resource ^
Appointm	ent Date			🔳 की	3 Hour(s) 30 Minutes	14-Aug-2018	- 08:00 VALIDATE	ADAM	14-Aug-2018 - 08:00	NM MPI Rest Inj 1 Day	LGH NM
Date rate	ange: 094	Aug-2018 📮	✓ 08-Sep-2018	¥		14-Aug-2018	- 10:00 VALIDATE,	ADAM	14-Aug-2018 - 10:00	NM MPI Stress Inj 1 Day/Card Graded Exercise	LGH NM
◯ Sched	ule in: 1	▲ Davs ∨ F	mm· 09-Aug-2018	~		14-Aug-2018	- 11:10 VALIDATE,	ADAM	14-Aug-2018 - 11:10	NM MPI Stress Scan	LGH NM
		• 0 0 y 5 • 1	1011	#	3 Hour(s) 20 Minutes	14-Aug-2018	- 08:10 VALIDATE,	ADAM	14-Aug-2018 - 08:10	NM MPI Rest Inj 1 Day	LGH NM
O Date re	estrictions: Nex	d 2 Days	~			14-Aug-2018	- 09:10 VALIDATE,	ADAM	14-Aug-2018 - 09:10	NM MPI Hest Scan	LGH NM
Mag	Tue	Thu Da	Cat Cup Exceptio			14-Aug-2018	- 11:10 VALIDATE	ADAM	14-Aug-2018 - 10:00	NM MPT Stress Inj T Day/Card Graded Exercise	LGH NM
MOT	lue weu		Sat Sun Exceptio	is in the	3 Hour(s) 30 Minutes	15-Aug-2018	- 08:00 VALIDATE	ADAM	15-Aug-2018 - 08:00	NM MPI Rest Ini 1 Day	LGH NM
						15-Aug-2018	- 09:10 VALIDATE	ADAM	15-Aug-2018 - 09:10	NM MPI Rest Scan	LGH NM
Appointm	ent Time					15-Aug-2018	- 10:00 VALIDATE	ADAM	15-Aug-2018 - 10:00	NM MPI Stress Inj 1 Day/Card Graded Exercise	LGH Carr
Time ra	ange: 080	0	2355			15-Aug-2018	- 11:10 VALIDATE,	ADAM	15-Aug-2018 - 11:10	NM MPI Stress Scan	LGH NM
	-			- <u>I</u> #	3 Hour(s) 20 Minutes	15-Aug-2018	- 08:10 VALIDATE,	ADAM	15-Aug-2018 - 08:10	NM MPI Rest Inj 1 Day	LGH NM
⊖ Time re	estrictions: AM	Only	~			15-Aug-2018	- 09:10 VALIDATE,	ADAM	15-Aug-2018 - 09:10	NM MPI Rest Scan	LGH NM
				_		15-Aug-2018	- 10:00 VALIDATE.	ADAM	15-Aug-2018 - 10:00	NM MPI Stress Inj 1 Day/Card Graded Exercise	LGH Carr
Schedu	le as visit within	1	day 🗸			15-Aug-2018	- 11:10 VALIDATE,	ADAM	15-Aug-2018 - 11:10	NM MPI Stress Scan	LGH NM
_				= m	3 Hour(s) 30 Minutes	16-Aug-2018	- 08:00 VALIDATE,	ADAM	16-Aug-2018 - 08:00	NM MPI Rest Inj 1 Day	LGH NM
Override	e suggested date and	time				16-Aug-2018	- 09:10 VALIDATE,		16-Aug-2018 - 09:10	NM MPI Rest Scan	LGH NM
E Cabada	la andrata anna ta					16-Aug-2018	- 10.00 VALIDATE,		16-Aug-2018 - 10:00	NM MPI Strate Scan	LGH NM
Schedu	le multiple persons to	mixed Group Sessions		=1 ef-	3 Hour(s) 20 Minutes	16-Aug-2018	- 08:10 VALIDATE	ADAM	16-Aug-2018 - 08:10	NM MPI Best Ini 1 Day	LGH NM
			Clear Suggest	<	o nooney zo minutoo				107.09 2010 00.10		>
Next	Next Day	(Clear	Select							OK	Cancel

5. Click **Suggest** to find an appointment for the patient.

- 6. Change the Suggest Criteria as appropriate. Click **Suggest**.
- 7. Select an appointment, noting the date and time. Click OK.
- 8. **Confirm** the appointment in the WIP. Ensure you have the correct day selected to view the appointments in the different books.
- 9. Add an Encounter.

B					Encounter Sel	ection		? ×
End	counter Number	Enc Type	Disch Date	Admit Type	Facility	Nurse Unit	Encounter Prsnl	Provider Name
760	0000002141	Inpatient			LGH Lions Gate	LGH 6E	Attending Provider	TestUser, GeneralMedicine-Physic
-								
<	_							>
	Modify	Add En	c					OK Cancel

10. Ensure you select a **Pre-Recurring** Encounter Type. Once you click OK, you will see a box appear with the Encounter number. Note this number and associate the new encounter to the rest of the appointments.

[ALERTS Patient Information	Encounter Information Insura	nce Insurance Summary Addi	tional Contacts	
	Encounter Type: Pre-Recurring	Medical Service: Medical Imaging	Reason for Visit: chestpain	Referral Source:	
	─ Location ─ Facility: LGH Med Imaging ∨	Building: LGH Med Imaging V	Unit/Clinic: LGH Med Imaging 🗸 🗸	Accommodation Reason:	Patient Accom Requested:



8			Enc	ounter Selectio	on		? ×
Encounter Number	Enc Type	Disch Date	Admit Type	Facility	Nurse Unit	Encounter Prsnl	Provider Name
760000002141	Inpatient			LGH Lions Gate	LGH 6E	Attending Provider	TestUser, GeneralMe
760000010038	Pre-Recurring			LGH Med Imaging	LGH Med Imaging		
<							>
Modify	Add Enc					ок	Cancel

11. Confirm your appointment by looking in the **NM book** and then opening the **Cardiology bookshelf** to see the cardiac appointment.



12. Open the LGH NM/Card Book to see both of the appointments in the same book.





Key Learning Points Scheduling a multimodality appointment will require booking rooms in different Scheduling Books. While the system will suggest those rooms automatically, you need to make sure that all the components' details are completed. When you add a new encounter for outpatient NM exams, always choose Pre-Recurring for the encounter type unless it is an inpatient or emergency encounter choose that encounter. All the components of an order must be scheduled on the same (newly created) pre-recurring encounter For the appointments across multiple departments (i.e. MI and Cardiology), you must enter the reasons for exam separately using Appointment Attributes. You can do this by highlighting each order. In other departments the reasons may be pre-defined drop-down items, while in MI they are free text. In addition to NM orders, the XR Colon Transit Study needs to be scheduled as a Pre-recurring encounter.



PATIENT SCENARIO 6 (Supervisors Only)

Learning Objectives

At the end of this Scenario, you will be able to:

- Remove a completed exam on an incorrect patient
- Run Reports using Discern Reporting Portal

SCENARIO

As a supervisor you have some extra tasks to complete. A tech informs you that an exam was completed on the wrong patient but has not yet been reported on. You will now learn how to remove the exam so it does not get reported on by the Radiologist. After you will run a departmental report.



Activity 6.1 – Removing a Completed Exam (Supervisors Only)

There may be an occasion where a technologist has completed an exam on an incorrect patient. You can remove this by following the steps below. Please note that as per your site, you will need to reorder the exam on the correct patient following this activity if you have not done so already. In order to complete this activity you **must be logged in as a supervisor.**

- Find the completed XR Chest/Abdomen Single Exposure exam for your patient on the Online Work List.
 - 1. Right-click on the Exam and select **Details**.

NOTE: Make sure you have the Show completed exams ticked.

ſ	Show complete	ed exams								
	Status	Priority	2 t Name	Procedure Name			Transport Mode	Or	Requested DT/TM	Accession Number
	On Hold	Routine	CSTPRODMI, TEST PATIENT BOB	RF Aspiration Foot Left					05-Sep-2017 15:00	
	On Hold	Routine	CSTPRODMI, TEST PATIENT BOB	CT Ablation Bone			Ambulatory	ě	06-Sep-2017 11:30	
	Completed	Routine	CSTPRODMI, TESTAC	XR Ankle Right		ninet\ Demoir	t Datiant Daalast		05-Sep-2017 12:13	112-XR-17-0002629
	On Hold	Routine	CSTPRODMI, TESTAC	NM Lymphatic Sentinel No		nnt\kepnr	it Patient Packet		07-Sep-2017 13:00	
	Completed	Routine	CSTPRODMI, TESTAC	NM Bone Whole Body	E	xam Mana	gement		05-Sep-2017 13:22	112-NM-17-00003
	Completed	Routine	CSTPRODMI, TESTAC	MRI Shoulder w/ Contrast F	Т	ranscriptio	n		05-Sep-2017 13:15	112-MR-17-00011
	Completed	Routine	CSTPRODMI, TESTAC	MRI Head w/ Contrast	s	chedule In	quiry		05-Sep-2017 14:30	112-MR-17-00011
	Ordered	Routine	CSTPRODMI, TESTAC	MRI Head Stereotactic w/ C	D	rotocol	1		05-Sep-2017 13:12	112-MR-17-00011
	Completed	Routine	CSTPRODMI, TESTAC	IR Tube Removal Biliary		TOLOCOT			05-Sep-2017 13:05	112-IR-17-0000450
	Completed	Routine	CSTPRODMI, TESTAC	CT Wrist w/ Contrast Bilatera	Α	dd Interes	ting Case File		05-Sep-2017 13:09	112-CT-17-0003014
	Completed	Routine	CSTPRODMI, TESTAC	CT Head w/ Contrast	C	omments			05-Sep-2017 10:55	112-CT-17-0002949
	Completed	Routine	CSTPRODMI, TESTAC	BD Single Area		llorgies			05-Sep-2017 13:11	112-BD-17-0000202
	On Hold	Routine	CSTPRODMI, TESTADRIENNE	RF Arthrogram Ankle Right		alergies			05-Sep-2017 14:15	
	Canceled	Routine	CSTPRODMI, TESTADRIENNE	MRI Ankle Arthrogram Righ	P	atient Exar	n History		05-Sep-2017 14:45	
	On Hold	Routine	CSTPRODMI, TESTADRIENNE	CT Sinogram or Fistulogram	D	ocument I	mage		07-Sep-2017 09:00	
	Canceled	Routine	CSTPRODMI, TESTANNAB TES	XR Calcaneus Left	N	Andify Ord	er Details		05-Sep-2017 00:30	112-XR-17-0001736
	On Hold	Routine	CSTPRODMI, TESTANNAB TES	RF Arthrogram Hip Right					ep-2017 13:45	
	On Hold	Routine	CSTPRODMI, TESTCASTCLINIC	CT Head Spine Cervical	R	enlace			ep-2017 08:15	
	On Hold	Routine	CSTPRODMI, TESTEASE	CT Spine Cerv/Thor w/ + v/o	D	etails			06-Sep-2017 09:15	
					_					

2

In the Order Detail Inquiry, note the patient's MRN and their Financial number (their Encounter #).





³ Next, select the **Remove Exam** icon 🥢

from Store Front. Find your patient by clicking the

magnifying glass and using the person search.

	VIP Deceased A	lerts BC PHN	MBN N	ame	DOB	Age	Gender	Address	Address	2) City	Postal/Zip Code	Home Phon	e Historical MR	N
	6	9876785151	700005072 C	STPRODMI, TESTA	C 05Jan-1983	34 Years	Female	100 Main S	t	Vancouver	V687J7			
	-													
	1													
÷ •														
· · · · · · · · · · · · · · · · · · ·	Facility	Encounter #	Visit #	Enc Type	Med Service		Unit/Clinic	R	oom Bed	Est Arrival Dat	e Reg Date	Dis	ch Date	Attending Provide
	📲 LGH Lions Gate	700000015548	70000001554	8 Inpatient	General Internal	Medicine	LGH 3W	3	01A 01A	30-Nov-2017	3:00 27-Nov-20	17 11:09		Plisvco, Wesley, I
	- WHC Med Imag	ng 7000000011458	20000001152	3 Emergency	Emergency		WHC Med In	maging			05-0ct-20	17 9:42		Provider, Emerger
	📲 WHC Med Imag	ng 7000000011359	2 0001142	1 Outpatient	Medical Imaging		WHC Med I	maging		03-Oct-2017 1	5:30 03-0ct-20	17 14:28 03	Oct-2017 23:59	Plisvca, Rocco, N
	- Carrier magn	g 7000000000002	000398	32 Outpatient OB	Medical Imaging		LGH Med Im	naging		05-Sep-2017	4:30 05-Sep-20	17 10:49 27-	Nov-2017 11:05	Plisvcc, Trevor, N
	LGH Med Imagir	g 700000009438	70000000947	'9 Outpatient	Medical Imaging		LGH Med In	naging		24-Aug-2017	14:00 24-Aug-20	17 11:50 24	Aug-2017 23:59	
	STELEN LIONS GALE	700000000315	70000000895	i6 Inpatient	General Surgery		LGH 3W	3	27 01B	24-Aug-2017	2:00 14-Aug-20	17 10:36 17	Aug-2017 8:10	Plisvce, Noe, MD
	LGH Lions Gate	700000008283	70000000831	9 Emergency	Emergency		LGH ED	A	CWR	02-Aug-2017	3:50 28-Jul-201	713:10 08-	Aug-2017 10:24	Provider, Emerger
	34 LGH Lions Gate	700000007604	70000000763	39 Inpatient	Medical Imaging		LGH 3W	3.	21 01C		14-Jul-201	7 9:06 27	Jul-2017 11:15	Plisvca, Rocco, M
et														

Only people in Supervisor positions have the ability to remove exams; an exam would be removed if completed on the wrong patient (data remediation). If you have difficulties, please address your instructor.

4 The Remove Exam window will reopen.

- 1. Select the **Exam** you wish to remove.
- 2. Choose a **Remove Reason** from the drop-down list.
- 3. Select **Remove**.

k View Select Help								
()								
-								
/led rec: 700005072								
tient Information								
Name: CSTPRODMLTESTAC		DOB: 05-Jan-1983		Gen	der: Female			
MRN: 700005072		Age: 34 Years		Gen	der. remaie			
		2						
	Describer	0	01-1-1	O				
ession 2-RD-17-0000202	BD Single Area	Comment	New	05-Sep-2017 13:13				
2-CT-17-0003014	CT Wrist w/ Contrast Bilateral		New	05-Sep-2017 13:10				
2-IR-17-0000450	IR Tube Removal Biliary		New	05-Sep-2017 13:08				
2-MR-17-0001195	MRI Shoulder w/ Contrast Right		New	05-Sep-2017 13:17				
			New	05-Sep-2017 13:23				
2-XR-17-0002629	XR Ankle Right		New New	05-Sep-2017 13:23 05-Sep-2017 12:15				
2-XR-17-0002629	XR Ankle Right		New	05-Sep-2017 13:23 05-Sep-2017 12:15				
2-XR-17-0002629	XR Ankle Right	1	New New	05-Sep-2017 13:23 05-Sep-2017 12:15				
- MM- 17-00002629 2-XR-17-0002629	XR Ankle Right	1	New New	05-Sep-2017 13:23 05-Sep-2017 12:15				
2-XR-17-0002629	XR Ankle Right	1	New New	05-Sep-2017 13:23 05-Sep-2017 12:15				
	XR Ankle Right	1	New New	05-Sep-2017 13:23 05-Sep-2017 12:15				
- HH 17-0002629	XR Ankle Right	1	New New	05-Sep-2017 13:23 05-Sep-2017 12:15				
	XR Ankle Right	1	New New	05-Sep-2017 13:23 05-Sep-2017 12:15				
-WA 17-0002629	XR Ankle Right	1	New New	05-Sep-2017 13:23 05-Sep-2017 12:15				
	XR Ankle Right	1	New	05-8ep-2017 13:23 05-8ep-2017 12:15				
	XR Ankle Right	1	New New	05-8ep-20171323 05-8ep-201712:15				
	XR Ankle Right	1	New New	05-8ep-20171323 06-8ep-201712:15				
2444-329009262 2XR-17-0002629	XR Ankle Right	1	New New	05-Sep-2017 13:23 05-Sep-2017 12:15				
14 MA 14 2000955 2007 17 2002629	XR Ankle Right	1	New New	05-8ep-20171323 06-8ep-201712:15				
1414 - 1 - 9000905 - XYR-17-0002629	XR Ankle Right	1	New New	05-8ep-20171323 05-8ep-201712:15				
2404-3-2009265 22R-17-0002629	XR Ankle Right	1	New New	05-8ep-20171223 05-8ep-201712:15				
2004 - 12 0002659 2XR-17:0002659	XR Ankle Right	1	New New	05-8ep-20171323 06-8ep-201712:15	3			
vow removed exama	y XR Ankle Right	2	New New	05-8ep-20171323 05-8ep-201712:15	3	Remove	Clear	Exit



An Alert will pop up.

4. Click Yes



The exam will be removed.

5. Click Exit.

The exam's status will be listed as **Removed** on the **Online Work List**.

Г	Status			Patient Name	Procedure Name
I	Removed	5	e	CSTPRODMI, TESTAC	XR Ankle Right
h	Un Hold		e	CSTPRODMI TESTAC	NM Lymphatic Sentinel Node Breast BILAT



Activity 6.2 – Run Reports from Discern Reporting Portal (Supervisors Only)

The **Discern Reporting Portal** tool will be used by techs, clerks, database analysts (DBAs), database coordinators (DBCs), and supervisors to generate reports on Medical Imaging activity such as Run, Cancel, Removed, and Replaced Exams by Personnel report. This activity will show you how to run a report.

- 1
- 1. Select the **Discern Reporting Portal** icon *from StoreFront or you can find it in the toolbar in PowerChart.*



A list with all reports opens up.

		Reporting Portal		
eporting Portal			Welcome: Train, Superviso	r-RadNet1 Settings He
Reporting Portal		Q Sear	ch for Report Title	
Filters	All Reports (20) My	/ Favorites (0)		1 0
	Report Name	 Categories 	Source	♦ Favorite ♦
Source	Completed Exams	Imaging - Radiology Reports	Operational Public	
Categories All Imaging (0/11)	Completed Non-Final Ex to Date	ams Week Imaging - Radiology Reports	Operational Public	
 Imaging - Radiology Operational Imaging - Radiology Scheduling ((Credited MI Charges	Imaging - Radiology Reports	Operational Public	
 Imaging - Radiology Tech (0/11) Medication Administration (0/18) 	Detail Daily Exam Log	Imaging - Radiology Reports	Operational Public	
Research (0/1)	Exam Statistics Report b	y Exam and _{Imaging} - Radiology Reports	Operational Public	
Recent Reports	Exam Volumes by Order	Imaging - Radiology Reports	Operational Public	
	Exams on Time	Imaging - Radiology Reports	Operational Public	
	Exams with Add'l Charge 4 ICD-9 Codes	s B. Os, CPT Imaging - Radiology Reports	Operational Public	
>	Fluoroscopy Time	Imaging - Radiology	Operational Public	- Sat
				TO

You can select the reports by **Source** or by **Categories**. The Categories will help you narrow down your reports by selecting the appropriate imaging folders: Imaging – Radiology Operational etc.



Scroll to see the different reports available, use the numbers or arrows to change the page.
 NOTE: Depending on your position, you are permitted access to all folders or only certain folders. You can add a report to your favorites by selecting the star which will then be highlighted in yellow and the report will appear in the My Favorites tab.



- 1. Click **Categories** to find the Imaging reports.
- 2. Select the Imaging Radiology Operational box.
- 3. Click on the report titled **Completed Exams**.
- 4. Click Run Report.

Filters	All Reports (20)	My Favorites (0)					1 0	
	Report Name	▼ Cate	egories	¢	Source		Favorite 🗢	1
Source	Completed Exams	lma Rep	ging - Radiology Operational orts		Public		\overleftrightarrow	
 Categories All Imaging (0/11) Imaging - Radiology Operational Imaging - Radiology Scheduling ((Imaging - Radiology Tech (0/11) Medication Administration (0/18) Medication Administration - Trout 	Description: This report shows the number of completed exam in a user define timeframe.	Suggested Report Suggested Report Frequency: Support Reference 1e090ba0-80f2-46 9647-a067384c91	User: Reporting Application: DA2 Alternate Name: Number: be- 15		Run Report	n Repor	kground Run	
Research (0/1)	Completed Non-Fin to Date	al Exams Week Ima Rep	ging - Radiology Operational orts		Public		$\stackrel{\wedge}{\sim}$	

- 3 A window pop- up requesting for you to select the Exam Complete DT/TM, department and Section before you can execute the report.
 - 1. Click the **icons** to choose the appropriate dates, departments and section you want to display in your report.
 - 2. Click Execute.

)	Completed Exams	
Exam Complete DT/TM		
Department	88	
Section	BO	
	Execute Cancel	



NOTE: The reports in the Train domain may not produce any results. The criteria you enter will differ depending on the report you run.

2



4

The report will load and then display. If you would like to save this report, you can export it and you can save it directly onto your desktop. You can also print this report by selecting the printer icon and choosing your printer. Hover to discover over each of the icons.

NOTE: If you chose to save your report on the portal it will only be saved for a period of 24 hours.

	Reporting Portal	- 🗆 ×
Reporting Portal Completed Exams X		
Change Runtime Prompts		
Completed Exams		
Showing page 1 of 1		√l √ ▷ I▷ Go to page: 🔁
Page #: 1 / 1 Report Completed Exams		
Date: Aug 1, 2018, 1:01 PM Executed by: Train, Supervisor-RadNet1 Date 2018-07-20 0000002018-08-01 23:59:59 Parameters: Selected LGH Med Imaging Department(s):		
Exam Complete Medical Record Patient Name Accession Order Proced DT/TM Number	<u>ure Department</u> Section <u>Completed</u> <u>Volume</u>	
Ľ		T0783

Key Learning Points

- Only supervisors can remove exams for data remediation.
- Exams can only be removed if they haven't been reported on by a radiologist.
- Use Discern Reporting Portal to run reports.



PATIENT SCENARIO 7

Learning Objectives

At the end of this Scenario, you will be able to:

Understand your role in an Interventional Radiology case

Clerk will be able to create an encounter, schedule a protocolled IR patient and receive the patient for check-in

SCENARIO

A faxed requisition arrives in your department from an outpatient from their Provider for an **US Drainage Chest Left**. Using PowerChart and RadNet the MI Clerk will register the patient, prepare the order for protocoling, schedule the exam, and check-in the patient on the day of the procedure. The IR Radiologist will protocol the order, and place relevant orders for the patient in Cerner, prior to scheduling. The IR Radiologist, IR Technologist and IR Nurse will perform the pre-procedural, intra-procedural and post-procedural related tasks and documentation.





Activity 7.1 – Create an Encounter and Document the Pre-Procedure Checklist (IR Only)

PM office is person management and will have been taught in your registration class. You can use this application to register patients without scheduling an appointment.

Open PM Office 🥌 from Storefront or from the Schapptbook.

1. Click the dropdown arrow to choose your conversation. Here we will choose to **Pre-Register Outpatient**.

NOTE: Please refer to IR Help Topic to determine the appropriate encounter type and conversation to be used depending on the exam (ex. Pre-register patient to a bed for a day surgery procedure).

2. Click OK.

1



2 The Person Search window will open. Search for the patient listed on your training card and then click **Search**. Select your patient and click **Add Encounter**.

			Persor	n Search									×
o search on the I	ioreign system.											Clo	se
P Deceased	Alerts	BC PHN	MRN	Name		DOB	Age	Gender	Add	ress		Address (2) City
	Process Alert	10760002141	7600021	41 VALIDATE	, ADAM	15-Aug-1938 12:3	0 79 Years	Male	214	2 West	Broadway		Vancou
													>
acility	Encounter	# Visit #		Enc Type	Med Se	ervice	Unit/Clinic	1	Room	Bed	Est Arrival D	Date	Reg Date
LGH Med Imag	ing 76000000 • 76000000	10038 76000 02141 76000	00010038	Pre-Recurring	Medica	l Imaging I Internal Medicine	LGH Med Im	haging	EI.	05	14-Aug-201	8 09:10 8 09:00	25.101.2018
, can cions ad	. 1000000	52141 10000	00002141	mpation	achera		Edition			05	14 Aug 201	0 00.00	230012010
													>
					ОK	Cano	el	Preview		A	dd Person	Add	Encounter
	citity LGH Med Imag	o search on the foreign system.	search on the foreign system.	citity Encounter # Visit # LGH Med Imaging 760000001038 76000000141 7600000141 76000000141 76000000141 76000000141 760000000141	cility Encounter # Visit # Enc Type LGH Med Imaging 500000010138 760000010038 760000010038 760000010038 7600000000000000000 760000000000000000	Person Search > search on the foreign system. P Decessed Alerts BC PHN MRN Name Process Alert 10760002141 7600002141 VALIDATE, ADAM Image: Search on the foreign system. Image: Search on the foreign system. Image: Search on the foreign system. Image: Search on the foreign system. Image: Search on the foreign system. Image: Search on the foreign system. Image: Search on the foreign system. Image: Search on the foreign system. Image: Search on the foreign system. Image: Search on the foreign system. Image: Search on the foreign system. Image: Search on the foreign system. Image: Search on the foreign system. 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Image: Search on the foreign system. <td>cilly Encounter # Visit # Enc Type Med Service ILGH Lions Gate 7600000012141 760000010038 Pre-Recurring Medical Imaging General Internal Medicine 760000012141 Value And Service Medical Imaging General Internal Medicine USA Value And Service Visit # Enc Type Medical Imaging General Internal Medicine USA Value And Service Visit # Enc Type Medical Imaging General Internal Medicine USA Value And Service USA Value And Service USA Value And Service USA Value And Service USA Value And Service USA Value And Service Value And Service Value And Service V</td> <td>Person Search</td> <td>Person Search Search on the foreign system. P Decessed Alerts BC PHN MRN Name D0B Age Gender Process Alert 10760002141 760002141 VALIDATE, ADAM 15:Augr133812:30 79 Years Male Image: Search Image: Search</td> <td>Person Search</td> <td>Person Search</td> <td>Person Search P Decessed Alerts BC PHN MRN Name DOB Age Gender Addless P Process Alert 10780002141 7600002141 7600002141 VALIDATE, ADAM 15-Aug-133312:30 73 Years Male 2142:West Broadway Image: Search on the foreign system Image: Search on the foreign system Image: Search on the foreign system Image: Search on the foreign system Image: Search on the foreign system Image: Search on the foreign system Image: Search on the foreign system Image: Search on the foreign system Image: Search on the foreign system Image: Search on the foreign system Image: Search on the foreign system Image: Search on the foreign system Image: Search on the foreign system Image: Search on the foreign system Image: Search on the foreign system Image: Search on the foreign system Image: Search on the foreign system Image: Search on the foreign system Image: Searc</td> <td>Person Search citizy BC PHN MRN Name DDB Age Gender Address Address Process Alert 10760002141 750002141 VALIDATE, ADAM 15-Aug 1333 12:30 73 Years Male 2142 West Broadway Image: Stress Alert 10760002141 750002141 VALIDATE, ADAM 15-Aug 1333 12:30 73 Years Male 2142 West Broadway Image: Stress Alert Image: Stress Aler</td>	cilly Encounter # Visit # Enc Type Med Service ILGH Lions Gate 7600000012141 760000010038 Pre-Recurring Medical Imaging General Internal Medicine 760000012141 Value And Service Medical Imaging General Internal Medicine USA Value And Service Visit # Enc Type Medical Imaging General Internal Medicine USA Value And Service Visit # Enc Type Medical Imaging General Internal Medicine USA Value And Service USA Value And Service USA Value And Service USA Value And Service USA Value And Service USA Value And Service Value And Service Value And Service V	Person Search	Person Search Search on the foreign system. P Decessed Alerts BC PHN MRN Name D0B Age Gender Process Alert 10760002141 760002141 VALIDATE, ADAM 15:Augr133812:30 79 Years Male Image: Search Image: Search	Person Search	Person Search	Person Search P Decessed Alerts BC PHN MRN Name DOB Age Gender Addless P Process Alert 10780002141 7600002141 7600002141 VALIDATE, ADAM 15-Aug-133312:30 73 Years Male 2142:West Broadway Image: Search on the foreign system Image: Search on the foreign system Image: Search on the foreign system Image: Search on the foreign system Image: Search on the foreign system Image: Search on the foreign system Image: Search on the foreign system Image: Search on the foreign system Image: Search on the foreign system Image: Search on the foreign system Image: Search on the foreign system Image: Search on the foreign system Image: Search on the foreign system Image: Search on the foreign system Image: Search on the foreign system Image: Search on the foreign system Image: Search on the foreign system Image: Search on the foreign system Image: Searc	Person Search citizy BC PHN MRN Name DDB Age Gender Address Address Process Alert 10760002141 750002141 VALIDATE, ADAM 15-Aug 1333 12:30 73 Years Male 2142 West Broadway Image: Stress Alert 10760002141 750002141 VALIDATE, ADAM 15-Aug 1333 12:30 73 Years Male 2142 West Broadway Image: Stress Alert Image: Stress Aler



11

3 Using your previous knowledge go through the steps of registration. Make sure you are registering the patient as **Pre-Outpatient**.

NOTE: When undertaking this task make sure to choose the correct type of encounter (pre-outpatient, pre-daycare, pre-minor procedure etc.)

Medical Record Number: 700003789	Encounter Number:	Last Name: CSTPRODMI	First Name: TESTADRIENNE	Middle Name:	Preferred Name:
Age: 22Y	Gender: Female 1	BC PHN: 9876952828	Pre-Reg Status:	Images	
ALERTS Patient Information	Encounter Information Insur	ance Insurance Summary Ad	ditional Contacts		
Encounter Type: Pre-Outpatient	Medical Service: Medical Imaging	Reason for Visit: ▼ IR	Referral Source:]	
Pre-Outpatient Pre-Outpatient in a Bed Pre-Outpatient op Pre-Outpatient op Pre-Becurring	Building: 2 Ied Imaging	Unit/Clinic: - LGH Med Imaging -	•		

4 Add an estimated date and time of the expected appointment. It does not need to be exact, as the scheduling date of the patient will override this date. Select **Complete**.

Pre-Reg User Name:	Estimated Arrive Date:	Estimated Arrive Time:	•
		Complete	Cancel



NOTE: You can use the shortcuts T and N to populate Today's date and the current time.

5 After you complete registration of the patient, write the encounter number on the requisition. Open **PowerChart** from **Storefront** and find your patient.

Pre-Register Outpatient	×
The following LGH Medical Imaging aliases have been assigned for VALIDATE, ADAM: Encounter Number: 760000010039 Visit Id: 7600000010039	
ОК	

Lab and other previous results can be viewed on the **Imaging General** (1) page, **CareConnect** (2) and **VCH and PHC PACS** and/or **PHSA PACS** (3). Print out previous Labs and other relevant documentation for the patient and attach them to the original paper requisition.



NOTE: Print relevant reports directly from the **CareConnect** tab accessed via **PowerChart.**

Realth Education Materi	als 😋 SHOP Guidelines and DSTs	UpToDate _						
VALIDATE, ADAM								
VALIDATE, ADAM		DOB:15 Aug-1938 Age:79 years	MRN:760002141 Enc:760000010038	Code Status Previous code status	details available.26	Jul-2018 1Process Disease	Fells Risk	
Allergies: Peanuts		Gender:Male	PHN:10760002141	Dosing Wt:80 kg		Isolation		
Menu ?	🗧 🤄 🔹 🛖 Imaging	General						
Imaging General	ABLABIA	1005 100 0 0						
Appointments	Tananing Fungerin	et Salue faite		1				
Results Review	turndling skuppers	25 Potore order		t-				
Orders + Add	Patient Information		1	💷 🔿 🛛 Allergies (3) 🌩			≡• ⊗	Clinical Research (0)
Patient Information	Chief Complaint:	No result	found	All Visits				Concernant and the Party of the
	Reason For Visit:	chestpain		Peanuts	Hive	5		Documents (1)
	Primary Physician:	Train, Ge	neralMedicine-Physician17, MD					All Volts -
Allergies	Attending Physician:	No result	Measurements and Weight			≡• ⊙	My Documents	
CareConnect	Admitting Physician:	No result	tound	All Visits				New Tupe
Clinical Research	Room/Red:	No result	found		Laters	Previous	Disease	General Medicine Progress I
Diagnoses and Problems	Admit Date:	No result	found	Mainhill anoth Maximud	uidus 180	- within	Usigi.	
Form Browser	Targeted Discharge Date:	No result	; found	Helging Cengur Heastined	10000	10		
Weterler	Advance Directive:	No result	i found	Weight Dosing	80 -	-	**	Medications
	Last Visit:	25/07/18	(Inpatient)		6 days			Selected visit
MAR Summary	Code Status:	No resul	ts found					A Scheduled (0)
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6 Documenting in the IR Procedure Checklist

- 1. Open Ad-Hoc documentation by clicking on the button on the toolbar.
- 2. Check the IR Procedure Checklist and click Chart to start documenting.

Edit View Patient Chart	Links Navigation H	lelp		
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- 1. Enter the **procedure** from the requisition in the free text box.
- 2. Add any outpatient medications that may be listed on the requisition.
- 3. Select **Yes** to Previous Imaging if there are relevant imaging results viewable in CareConnect or PACS. Select **Yes** for ready for Radiologist protocol.
- 4. Click the Check sign (4) to sign the form.

NOTE: Signing will add the protocolling request to the IR Radiologist's **Multi Patient Task List**, indicating that the patient is ready for protocolling. The window will close automatically. The paper requisition with all the printouts will be passed to the IR Radiologist.

(P)	Interventional Radiology Procedure Checklist - VALIDATE, ADAM	- 🗆 🗙
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- Status	Maximum ordered 650 mg, PO, q4h, PRN pain-mild or fever, o	lruc V
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Related Results		
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Medications (Outpatient)		
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Ready for Radiologist Protocol	O No O Yes	
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At this point, the IR Radiologist will access their Multipatient Task List, review the request, and mark the requisition with IR procedure to be scheduled. When you receive the requisition back you can schedule the procedure with the encounter already created.

7



Key Learning Points

- Reviewed creating Encounters and registering the patient to print relevant reports from PowerChart, accessing PACS and CareConnect.
- Completing the AdHoc documentation for IR Procedure Checklist that prepares the patient to be protocolled by the Radiologist.
- Schedule the protocolled order as usual, ensuring to keep the previously made encounter.



b End of Book

You are ready for your Key Learning Review. Please contact your instructor for your Key Learning Review.