

# **Exa® PACS/RIS**

# **Feature Summary**

## **Scheduler Overview**

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## Schedule appointments by using the schedule book

1. Go to **burger menu** > **Schedule**.
2. Select the facility, date, time, and modality room for the appointment.
3. Double-click a time slot for the appointment.

The screenshot shows the scheduler interface with several callouts:

- Facility Callout:** Select **Facility** to open a dropdown list of facilities, and select a facility.
- Filter Callout:** OR, select **Filter** to open a dropdown list of schedule filters, and select a filter. Depending on the how the filter is built, it may show multiple days, modality rooms, and facilities.
- Calendar Callout:** Select the date to open a calendar, and then select a date to open in the schedule book.
- Navigation Callout:** Select **TODAY** to move the schedule book to today's date. Select **Prev** or **Next** to move to the previous or next date.

4. In the **New Appointment** window, search for the patient

The screenshot shows the 'New Appointment' window with the following callouts:

- Search Fields Callout:** Use these fields to search for patient by demographics such as last name, first name, MRN, or DOB.
- Create & Schedule Callout:** OR select **CREATE & SCHEDULE** to create a new patient and schedule an appointment.

5. In the **New Appointment** screen in the figure below, enter or edit appointment information. Required fields are marked with a red asterisk.

**New Appointment**  
Dorothy TESTTWO

SEARCH   **APPT. INFO**   INSURANCE   EXAM PREP. INSTRUCTIONS   OTHER PHYSICIAN   PROVIDER ALERTS   PATIENT ALERTS   STUDY FORMS

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**Appointment Information**

Location: Garner  
 Modality: CR  
 Appointment Type: Select Appointment Type  
 Available Date: [Calendar Icon]  
 Resource: Fluoroscopy (76000)  
 Referring Physician: Root/Universal exam procedure (Root\_Appt)  
 Ordering Physician: XR Abdomen (Flat) (74020)  
 Attorney: XR Abdomen with Obliques (74910)  
 Stat Level: XR Abdomen with Obliques (74910)  
 Department: [Text Box]  
 Institution: [Text Box]

Reading Physician: Search Read. Physician  
 Body Part: Select  
 Orientation: Select  
 Accession No.: [Text Box]  
 Study Notes: Select Macro Note  
 Reason: [Text Box]

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**Diagnostic Codes**

Search ICD: [Text Box] [Search Icon]

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**Schedule Information**

Ordering Facility: No Ordering Facility Location Selected  
 Place of Service: Select  
 Source: Select  
 Patient Location: Select  
 Patient Room No.: [Text Box]  
 Patient Condition: Select  
 Supervising Physician: Select supervising physician  
 Technologist: Search Technologist

Requesting Date: MM/DD/YY  
 Remind Me for Earlier Appointment:   
 Transportation: Select  
 Injury Date: MM/DD/YY  
 Referral Number: [Text Box]  
 Patient's Condition:  Employment  
 Related To:  Auto Accident  
 Other Accident  
 Accident State: Select  
 Schedule Notes: Select Macro Note

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**Primary Insurance** [RESET]

Existing Insurance: Select  
 Carrier: Search Carrier  
 Provider Type: [Text Box]  
 Group Name: [Text Box]  
 Relationship: Select  
 DOB: MM/DD/YY  
 Sex: Select  
 Country: United States  
 City/State/ZIP: [Text Box] [Select] [ZIP Code] [ZIP Plus]  
 Subscriber Name: First Name [Text Box] MI [Text Box] Last Name [Text Box] Suffix [Text Box]

Policy Number: [Text Box]  
 Group No.: [Text Box]  
 Valid From Date: MM/DD/YY  
 Valid To Date: MM/DD/YY  
 Address Line 1: [Text Box]  
 Address Line 2: [Text Box]

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**Alerts**

**ADD SECONDARY INSURANCE**

**Exam Prep. Instructions**  
 No Exam Prep. Instructions to Display

**Other Physician**  
 No Referring Physician Selected

**Provider Alerts**  
 No Provider Alerts to Display

Schedule Notes appear on the schedule book appointment cards and the Daily Schedule report.

If the patient already has an insurance policy in Exa PACS/RIS, select it under **Existing Insurance**. Otherwise, you can add a primary, secondary, and/or tertiary insurance policy by using the fields.

**Insurance Alerts** appear here.

If the **Appointment Type** has exam prep instructions, they appear here.

Select **Other Physician** here to cc another physician for this appointment. If using the physician portal, cc'ing another physician allows them to also see the exam in the physician's portal

**Provider Alerts** from the referring physician and other physicians appear here.

Patient Alerts

- Diabetic/Metformin
- Difficult Patient
- HX of Breast CA
- Limited Mobility
- Multiple No Show/Cancellations
- Pacemaker/Metal Object
- Self Pay Patient

Custom Alerts

Notes

You can add or remove **Patient Alerts** here. You can also enter **Custom Alerts** and **Notes**. The patient alert bell appears in various places including the technologist screen and patient chart.

Study Forms

Search study forms

- Pregnancy Form  Patient Portal
- XRay Screening Form  Patient Portal
- HIPAA  Patient Portal

**Study Forms** are auto-attached here depending on the study form assignment criteria. Study forms can also be manually attached by selecting them from the dropdown list.

6. Select **Add Study** to add the exam. Add additional exams if needed by following the same steps.
7. When finished, select **Create Order**.

New Appointment

Dorothy TESTTWO ALERTS 1

SEARCH APPT. INFO. INSURANCE EXAM PREP. INSTRUCTIONS OTHER PHYSICIAN PROVIDER ALERTS PATIENT ALERTS STUDY FORMS

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Appointment Information

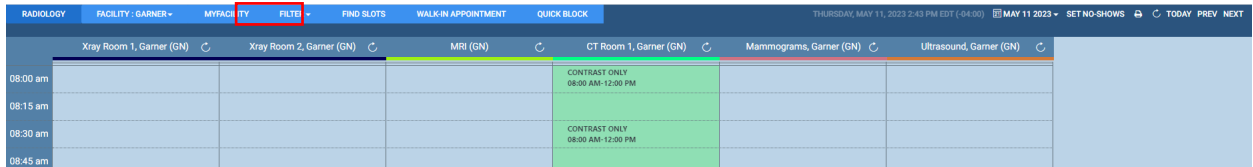
Location	Garner	Reading Physician	Search Read. Physician
Modality	CR	Body Part	Select
Appointment Type	XR Abdomen with Obliques	Orientation	Select
Available Date	05/11/2023 1:00 PM EDT	Accession No.	

No studies added yet

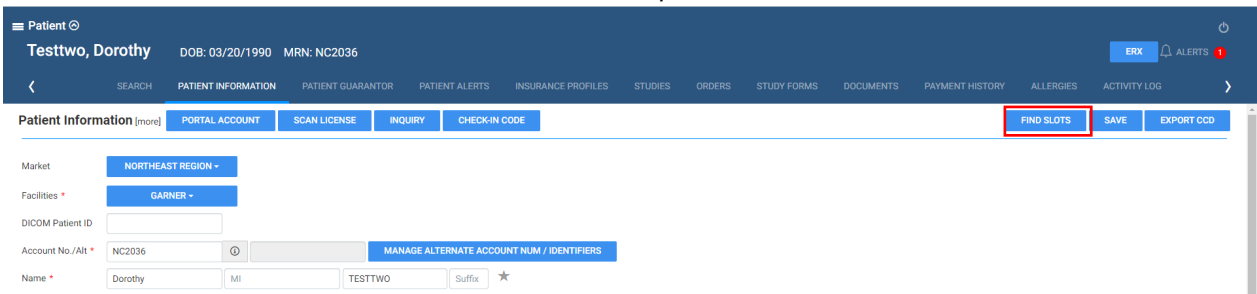
## Schedule an appointment by using Find Slots

The Find Slots feature is available for in various places within Exa PACS/RIS.

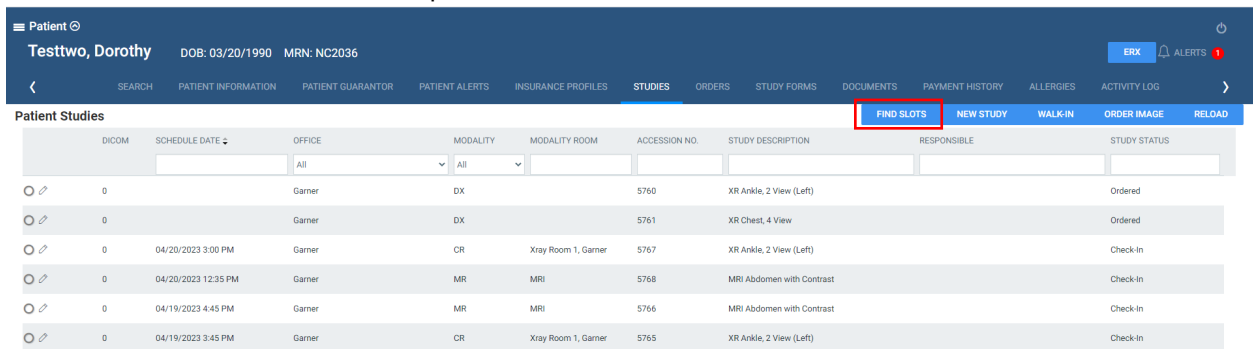
- From the **Schedule Book**



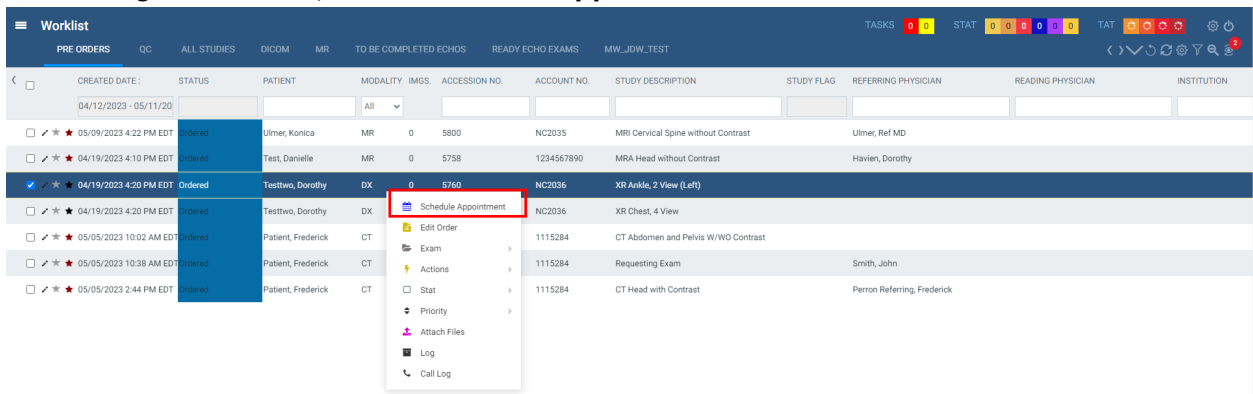
- From the **Patient Information** screen in the patient's chart



- From the **Studies** tab in the patient's chart



- If using **Pre-Orders**, select **Schedule Appointment** on the shortcut menu



1. In the **Find Slots** screen, select restrictions for the appointment such as **Appointment Types, Facility, and Days of the Week**.  
**Result:** Available timeslots appear based on your selection.
2. Select a timeslot, and then add additional exams as needed.
3. Select **Create Order**.

The screenshot shows the 'Available Slots' window with several callouts:

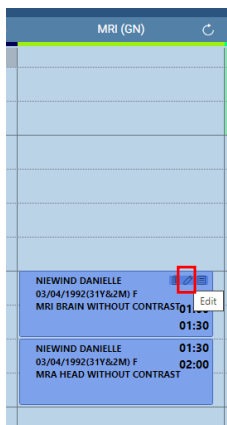
- Top Filters:** A red box highlights the filter section including Distance from Patient, Patient ZIP Code, Patient ZIP Plus, Patient Time Zone, Referring Physician, Carrier, and Appointment Type.
- Facility and Modality Room:** A red box highlights the 'Facility' dropdown (set to 'GARNER') and the 'Modality Room' dropdown (set to 'CT ROOM 1, GARNER').
- Appointment Details:** A red box highlights the 'Appointment Type' dropdown (set to 'CT Abdomen and Pelvis with Contrast') and the 'CREATE ORDER' button.
- Alerts:** A red box highlights the 'Alerts' section, which currently shows 'There are no alerts'.
- Appointment List:** A list of appointment slots is shown with columns for time, date, and location. A red box highlights a green square icon at the end of the 11:00 AM slot, with a callout stating: 'Schedule Template/Rule names appear here if you hover over the block.'
- Provider Alerts:** A red box highlights the text: 'Provider Alerts and Insurance Alerts appear here.'
- Create Order:** A red box highlights the text: 'Select Create Order when all exams have been added to the order.'
- Appointment Selection:** A red box highlights the text: 'Select restrictions to place on the appointment to narrow available timeslots'.

4. In the **Patient Search** screen, select a patient.
5. In the **New Appointment** screen, follow the same steps as when using the schedule book to finish scheduling the appointment.
6. If using **Find Slots** from a pre-order, select a timeslot from the list of available timeslots. Select **Update Order** to then schedule the appointment.

## Edit a study

To edit a scheduled study or order:

1. Double-click the appointment block on the schedule book, or select its edit (pencil) button.



2. In the **Edit Study** screen or **patient chart**, make changes as needed.

Use these tabs to view different areas of the study and patient chart.

## Reschedule an appointment by using the reschedule bucket

1. Go to **burger menu > Schedule**.

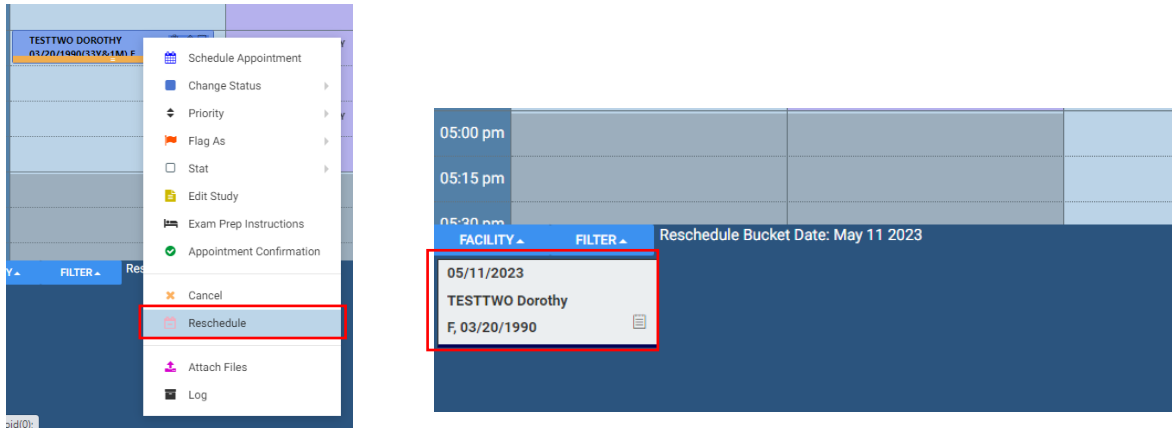
Select a facility or filter to apply to the reschedule bucket

This indicates the date for the reschedule bucket.

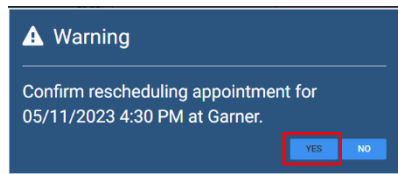
Select this refresh icon to refresh the reschedule bucket. This will refresh the reschedule bucket date to the date that your schedule book is on

Select this arrow to minimize or bring up the reschedule bucket

- Right click the appointment and select **Reschedule** to move the appointment into the reschedule bucket.

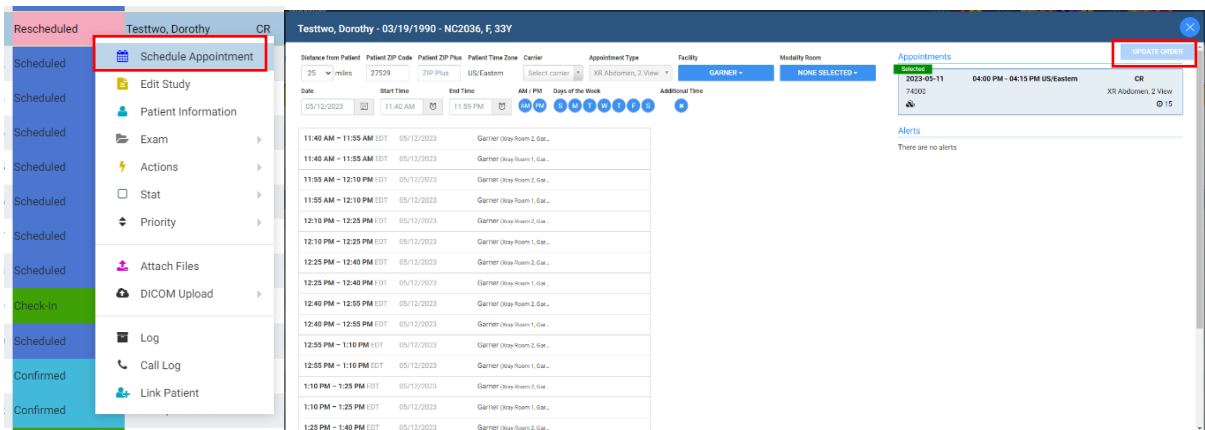


- On the **Schedule Book**, navigate to the new facility, date, and time for rescheduling the appointment.
- Drag the appointment block from the reschedule bucket to the new time slot.
- In the confirmation dialog, select **Yes** to reschedule the appointment.



### Rescheduling an appointment by using Find Slots

- Right-click an exam in “Rescheduled” status and select **Schedule Appointment**.
- In **Find Slots**, select a new timeslot, and then select **Update Order** to reschedule.





### Reschedule by using the schedule book

1. Select the appointment block on the schedule book.
  2. Drag the orange bar to move, shorten, or lengthen the appointment.
- Note:** You can move appointments to different days or facilities this way if using schedule filters that include modality rooms of the same modality type.

The screenshot illustrates the process of rescheduling an appointment. At the top, a zoomed-in view shows an appointment for 'TESTTWO DOROTHY' (DOB: 03/20/1990, 33Y&1M) F. The appointment is initially scheduled for 04:30 pm and is being moved to 04:00 pm, as indicated by the red arrow.

The middle section shows a full schedule grid for 'Xray, Jacksonville (JV)' on Thursday, May 11, 2023, and Friday, May 12, 2023. The grid displays various appointment slots, including 'ARTHROGRAMS ONLY' and 'TESTTWO DOROTHY'. A red arrow points to the appointment being rescheduled.

The bottom section shows the same grid with a red box highlighting a text box that explains the 'study filter' used to find the appointment:

This **study filter** shows all x-ray modality rooms at all locations for the next 5 days. Because the modality of the appointment is the same between these different modality rooms, the appointment can be rescheduled by dragging and dropping it.