Exa® PACS/RIS

Feature Summary

Scheduler Overview

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.

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

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

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.

exa-PLATFORM

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   Show Details

SCAN LICENSE   CREATE ORDER
🔔 ALERTS 1

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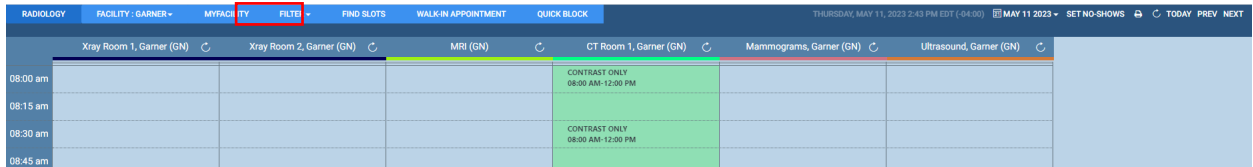
Appointment Information

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

Schedule an appointment by using Find Slots

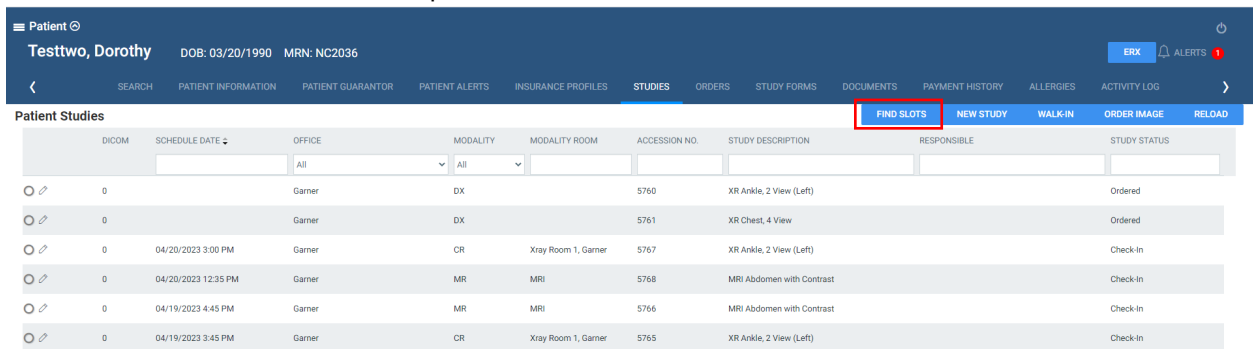The Find Slots feature is available for in various places within Exa PACS/RIS.
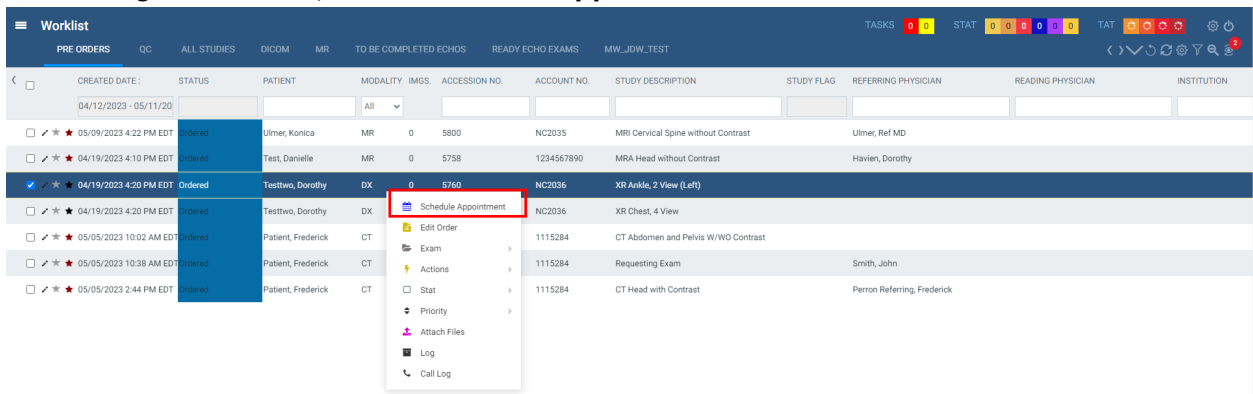
- From the **Schedule Book**

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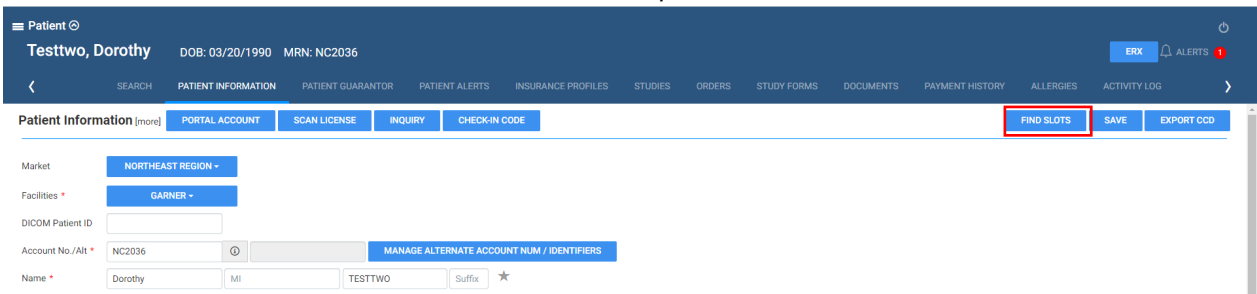
- From the **Studies** tab in the patient's chart

- 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**.

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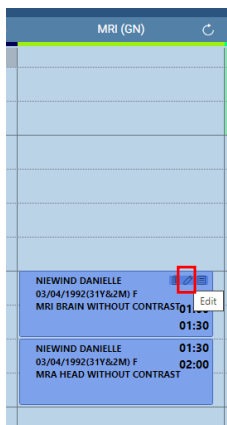
2. In the **Edit Study** screen or **patient chart**, make changes as needed.

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 this arrow to minimize or bring up the reschedule bucket
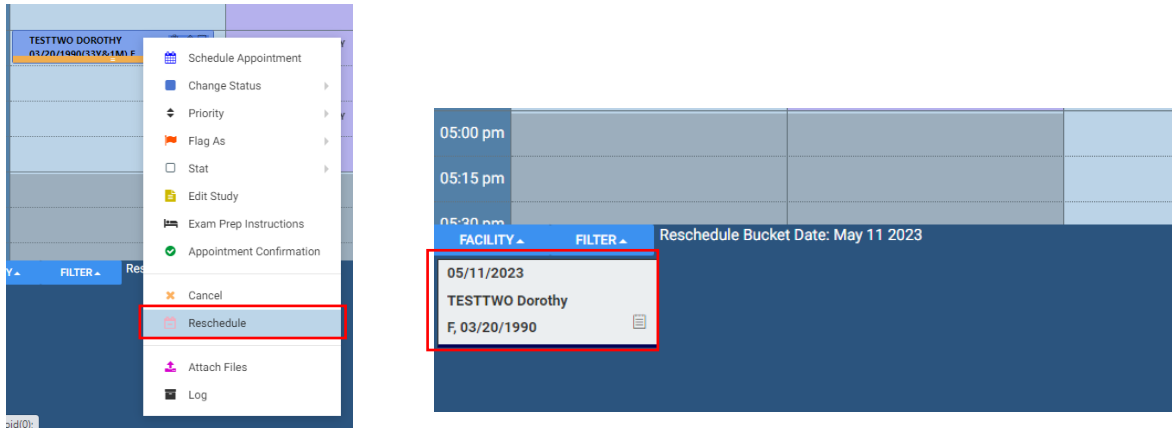
Select a facility or filter to apply to the reschedule bucket

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

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


3. On the **Schedule Book**, navigate to the new facility, date, and time for rescheduling the appointment.
4. Drag the appointment block from the reschedule bucket to the new time slot.
5. In the confirmation dialog, select **Yes** to reschedule the appointment.
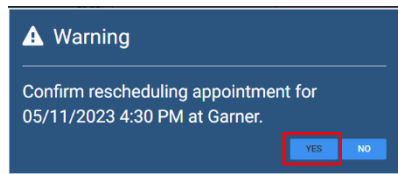
Rescheduling an appointment by using Find Slots

1. Right-click an exam in "Rescheduled" status and select **Schedule Appointment.**
2. In **Find Slots**, select a new timeslot, and then select **Update Order** to reschedule.
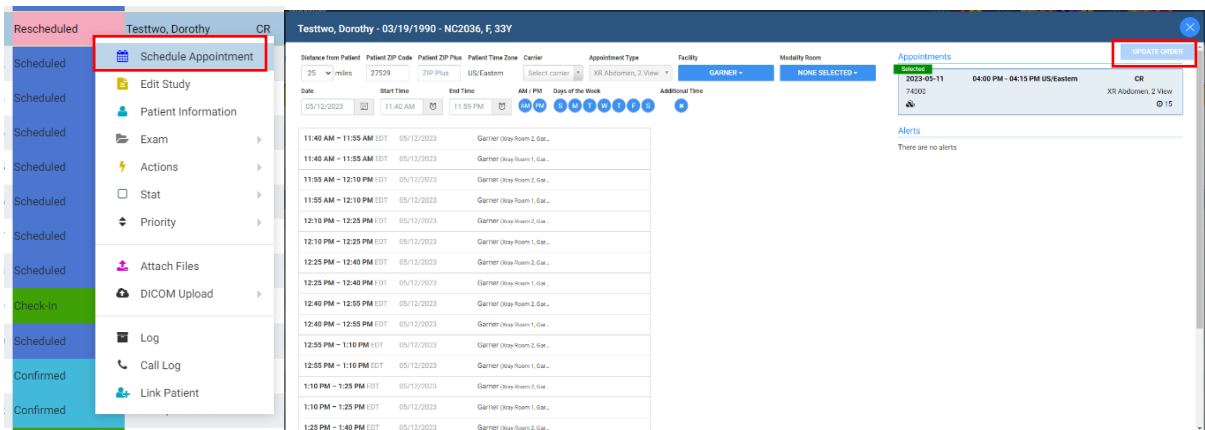
Reschedule by using the schedule book

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.

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.