

Exa® PACS|RIS

Feature Summary

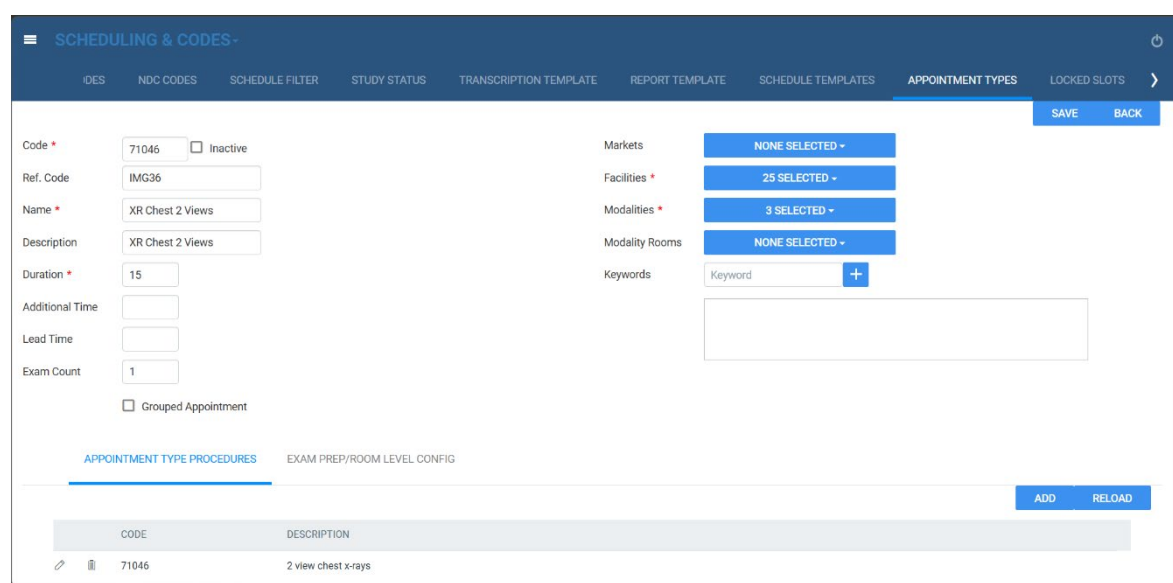
Appointment Templates

Configure appointment types

An *appointment type* defines a set of procedures to perform during an exam. You can configure appointment types for use in scheduling and other parts of the program.

1. On the burger  menu, select **SETUP > OFFICE > Scheduling & Codes > APPOINTMENT TYPES**.
2. Select **ADD** and then enter the following settings.

Setting	Description
Code	Type your internal code for the appointment type.
Ref. Code	Type the reference code.
Name	Type a name for the appointment type.
Description	Type a description for the appointment type.



Setting	Description
Duration	Type the expected duration of the appointment type.
Additional time	Type the additional time needed beyond the default duration (used for scheduling in Find Slots).
Lead time	Type the number of minutes to arrive before the exam begins. This can affect appointment confirmation's arrival times.
Exam count	Type the number of exams to be included.
Grouped appointment	Select for group appointments (see "Configure Grouped Appointments").
Facilities	Select one or more facilities where the appointment type is available.
Modality	Select one or more modalities to use for the appointment type.
Modality room	Select one or more modality rooms where the appointment type can be scheduled.
Keywords	To make the appointment type easier to find during scheduling, type a keyword and select the plus button. Add as many keywords as needed.

3. Select **SAVE**.

Note: For new appointment types, a pop-up window appears prompting you to choose a procedure code or risk inactivation of the appointment type. You can always reactivate an appointment type, but it must be active to use.

The screenshot shows the 'Appointment Procedure' window. At the top, there is a dark blue header with the title 'Appointment Procedure' and a close button (X). On the right side of the header is a 'SAVE' button. The main content area is divided into two sections. The left section contains form fields for CPT code selection: 'CPT Description *' with a dropdown menu showing '2 view chest x-rays' and an 'Inactive' checkbox; 'Code *' with a text input field containing '71046'; and four 'Modifier' fields (M1, M2, M3, M4), each with a dropdown menu. The right section is titled 'Diagnostic Codes' and features a search bar with the placeholder text 'Search ICD' and a magnifying glass icon.

4. On the **Appointment Procedure** screen, choose a CPT code appropriate to the appointment type.
Note: To make the procedure code available to select here, attach the “Diagnostic X-Ray” type to it (see the user manual on how to create a procedure code).
5. Optional. If diagnostic (ICD10) codes or modifiers are needed, select them here.
The codes and modifiers you select are applied to all studies with the appointment type you are configuring.
6. Select **SAVE**.
7. When prompted, select **YES** to start using the appointment type.

Next page: Edit an appointment type

Edit an appointment type

1. On the burger  menu, select **SETUP > OFFICE > Scheduling & Codes > APPOINTMENT TYPES**.
2. Using the column headers to filter and sort, find an appointment type to edit.

SCHEDULING & CODES

◀ ODES NDC CODES SCHEDULE FILTER STUDY STATUS TRANSCRIPTION TEMPLATE REPORT TEMPLATE SCHEDULE TEMPLATES **APPOINTMENT TYPES** LOCKED SLOTS

IMPORT EXPORT HELP ADD RELOAD

Facilities **NONE SELECTED**

CODE	REF. CODE	NAME	DESCRIPTION	MODALITY	GROUPED APPC	ACTIVE
 70465	1478	Complete X-Ray Skeletal Survey	X-Ray Skeletal Survey (Complete)	CR,DX		☒
 70671	1689	2D Digital Bilateral Mammo, Diagnostic	2D Digital Bilateral Mammo, Diagnostic	MG		☒
 70670	1688	2D Digital Screening Mammo	2D Digital Screening Mammo	MG		☒
 70672	1690	2D Digital Unilateral Mammo, Diagnostic	2D Digital Unilateral Mammo, Diagnostic	MG		☒
 70668	1686	3D Digital Bilateral Mammo, Diagnostic	3D Digital Bilateral Mammo, Diagnostic	MG		☒
 70667	1685	3D Digital Screening Mammo				☒
 70669	1687	3D Digital Unilateral Mammo, Diagnostic				☒
 76377	76377	3D RNDR I&R CT MRI US/OTH REQ POSTPCX				☒
 76376	76376	3D RNDR I&R CT MRI US/OTH X REQ POSTPCX	3D RNDR I&R CT MRI US/OTH X REQ POSTPCX	MR,CT		☒
 70294	1304	3D reconstruction MRI for surgical planning	3D reconstruction MRI for surgical planning	MR		☒
 78075	78075	ADRNL IMG CORTEX&/MEDULLA	ADRNL IMG CORTEX&/MEDULLA	NM		☒

Showing 100 of 1365

In the ACTIVE column, you can filter out inactive appointment types.

3. Double-click the appointment type to edit.
4. Edit properties and then select **SAVE**.
5. Optional: On the **APPOINTMENT TYPE PROCEDURES** tab, select the pencil  button to edit CPT codes, or select **ADD** to add one.

APPOINTMENT TYPE PROCEDURES EXAM PREP/ROOM LEVEL CONFIG

ADD RELOAD

CODE	DESCRIPTION
  77067	SCREENING MAMMOGRAPHY BI 2-VIEW BREAST INC CAD

Showing 1 of 1

6. In the **Exam Prep/Room Level Config** dialog, you can edit details of modality rooms.

Exam Prep/Room Level Config

SAVE

Modality Rooms * **NONE SELECTED**

Duration

Additional Time

Lead Time

Prep Instructions

If you have two machines that can perform the same study but at different speeds, you can configure the appropriate durations, which maximizes the number of studies that you can schedule on the schedule book. For example, say your facility has a 16-slice CT machine and a 64-slice machine, both of which can perform a chest and abdomen study. You can configure the modality room with the 16-slice machine to have a 15 minute duration, and the 64-slice room to have a 10 minute duration.

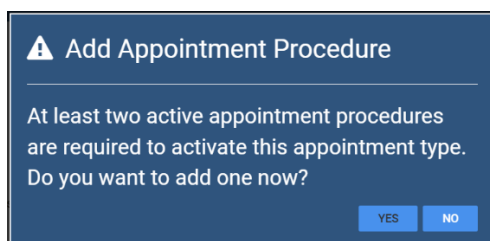
Grouped appointments

A *grouped appointment* is an appointment type that contains more than one billable procedure. Grouped appointments make it easy to schedule more than one procedure or exam during a single patient appointment. Grouped appointments can only be used with Find Slots (they cannot be used on the schedule book). To configure a grouped appointment:

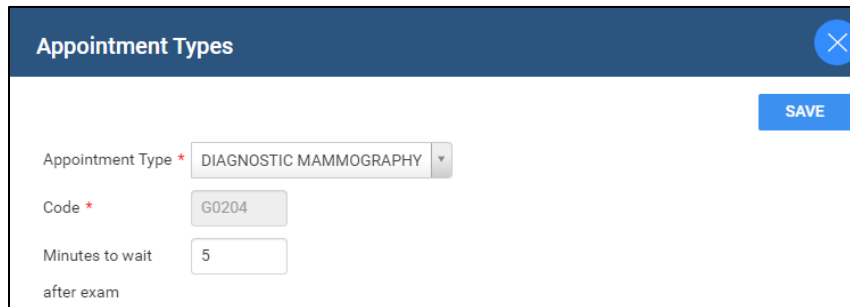
1. On the burger  menu, select **SETUP > OFFICE > Scheduling & Codes > APPOINTMENT TYPES**.
2. On the **APPOINTMENT TYPES** tab, select **ADD**.
3. Select the **Grouped Appointments** checkbox.
4. Enter the following settings.

Setting	Description
Code	Type your internal code for the appointment type.
Ref. Code	Type the reference code.
Name	Type a name for the appointment type.
Description	Type a description for the appointment type.
Duration	Type the expected duration of the appointment type.
Additional time	Type the additional time needed beyond the default duration. (Used scheduling in Find Slots).
Lead time	Type the number of minutes to arrive before the exam begins. This can affect appointment confirmation's arrival times.
Exam count	Type the number of exams to be included.
Grouped appointment	(Already Selected)
Facilities	Select one or more facilities where the appointment type is available.
Modality	Select one or more modalities to use for the appointment type.
Modality room	Select one or more modality rooms where the appointment type can be scheduled.
Keywords	To make the appointment type easier to find during scheduling, type a keyword and select the plus button. Add as many keywords as needed.

5. Select **SAVE**, and then in the message box, select **YES**.

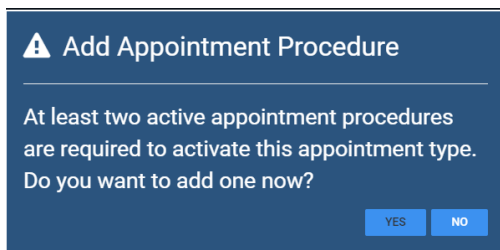


6. In the **Appointment Types** dialog box, select an appointment type to add to the grouped appointment. Optional. In the **Minutes to wait after exam** box, type the expected minutes the patient must wait between appointment types.



The 'Appointment Types' dialog box has a dark blue header with a close button (X) in the top right. A 'SAVE' button is in the top right corner of the main area. The form contains three fields: 'Appointment Type *' with a dropdown menu showing 'DIAGNOSTIC MAMMOGRAPHY', 'Code *' with a text box containing 'G0204', and 'Minutes to wait after exam' with a text box containing '5'.

7. Select **SAVE**, and then in the message box, select **YES**.



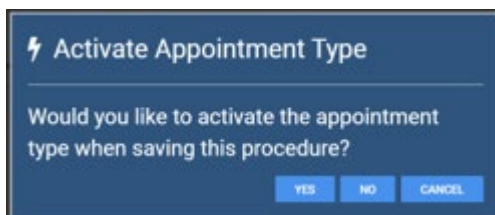
The 'Add Appointment Procedure' message box has a dark blue header with a warning icon and the title. The main text reads: 'At least two active appointment procedures are required to activate this appointment type. Do you want to add one now?'. At the bottom are 'YES' and 'NO' buttons.

8. When prompted to add a second study, select **YES**.
9. Repeat steps above until you add all appointment types to the grouped appointment.
10. On the **APPOINTMENT TYPES** tab, select **SAVE**.

IMPORTANT

Pay special attention to the order of studies to ensure that they are scheduled properly.

11. When prompted to activate the appointment type, select **YES**.



The 'Activate Appointment Type' message box has a dark blue header with a lightning bolt icon and the title. The main text reads: 'Would you like to activate the appointment type when saving this procedure?'. At the bottom are 'YES', 'NO', and 'CANCEL' buttons.

12. In the top right corner, select **SAVE**.

SCHEDULING & CODES

< ODES

NDC CODES

SCHEDULE FILTER

STUDY STATUS

TRANSCRIPTION TEMPLATE

REPORT TEMPLATE

SCHEDULE TEMPLATES

APPOINTMENT TYPES

LOCKED SLOTS

SAVE

CLEAR

BACK

Code *

UAT

☐ Inactive

Ref. Code

GEN-EIR8YQARE

Name *

Test Procedure

Description

Test Procedure

Lead Time

0 minutes (pulled from one of the appointment types below)

Exam Count

2

☒ Grouped Appointment

Markets

NONE SELECTED

Facilities *

MY COMPANY

Keywords

Keyword

+

APPOINTMENT TYPES

ADD

RELOAD