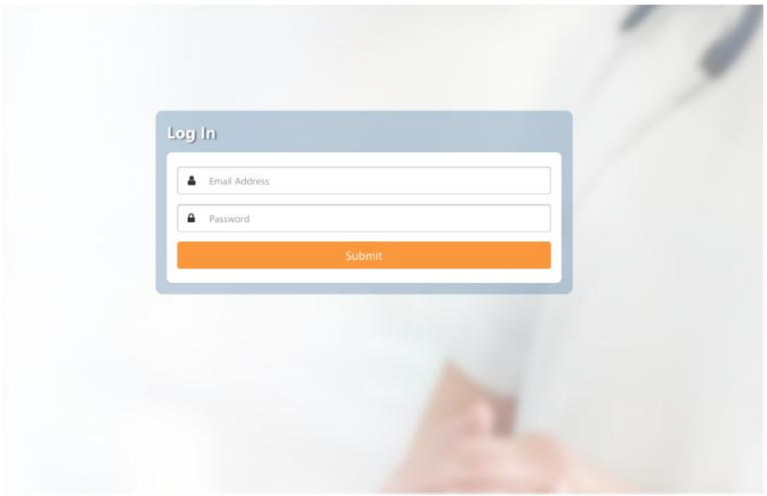
Referring Scheduler Guide

1. Login



1. Go to portal.opendr.com
2. Login with the unique username and password provided to you. Each scheduler must use their own.

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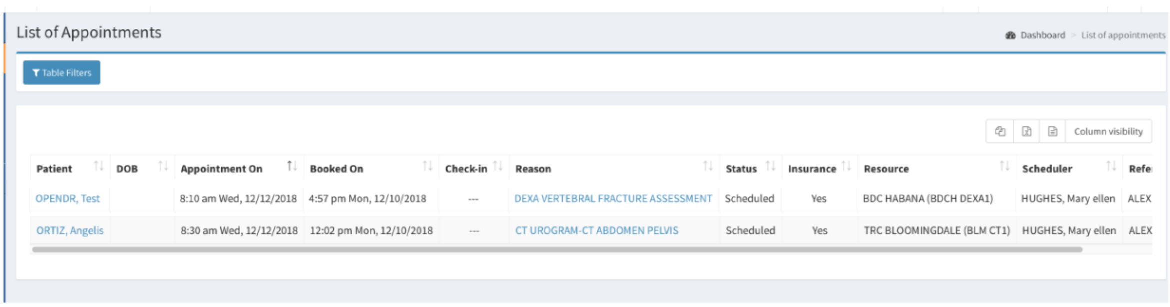
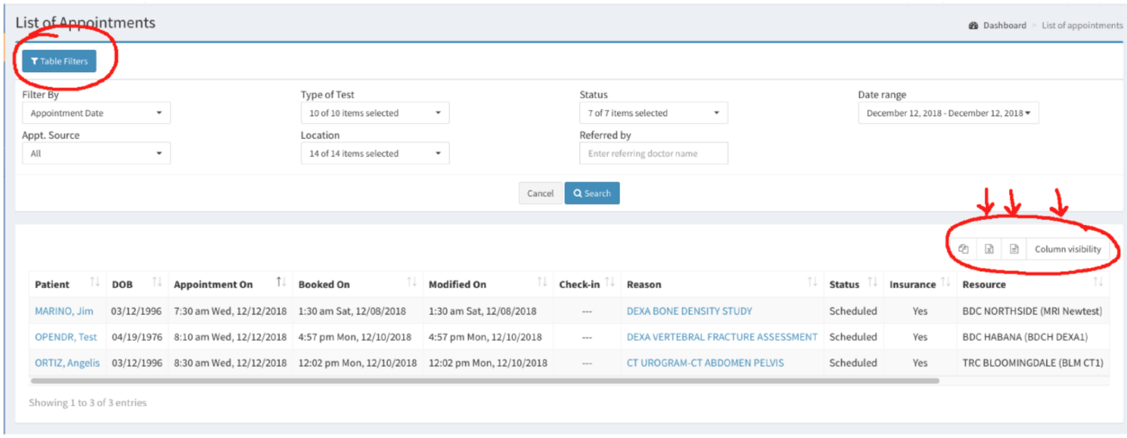
2. View Appointments



Patient	DOB	Appointment On	Booked On	Check-in	Reason	Status	Insurance	Resource	Scheduler	Refe
OPENDR, Test		8:10 am Wed, 12/12/2018	4:57 pm Mon, 12/10/2018	---	DEXA VERTEBRAL FRACTURE ASSESSMENT	Scheduled	Yes	BDC HABANA (BDCH DEXA1)	HUGHES, Mary ellen	ALEX
ORTIZ, Angelis		8:30 am Wed, 12/12/2018	12:02 pm Mon, 12/10/2018	---	CT UROGRAM-CT ABDOMEN PELVIS	Scheduled	Yes	TRC BLOOMINGDALE (BLM CT1)	HUGHES, Mary ellen	ALEX

Appointments reflected here are those booked within the EMR/RIS and online. Online appointments reflect all the appointments booked via OpenDr by YOUR practice. You can view appointments scheduled by the other schedulers in your practice.

2a. Filter Appointments



1. You can filter appointments by selecting “table filters.”

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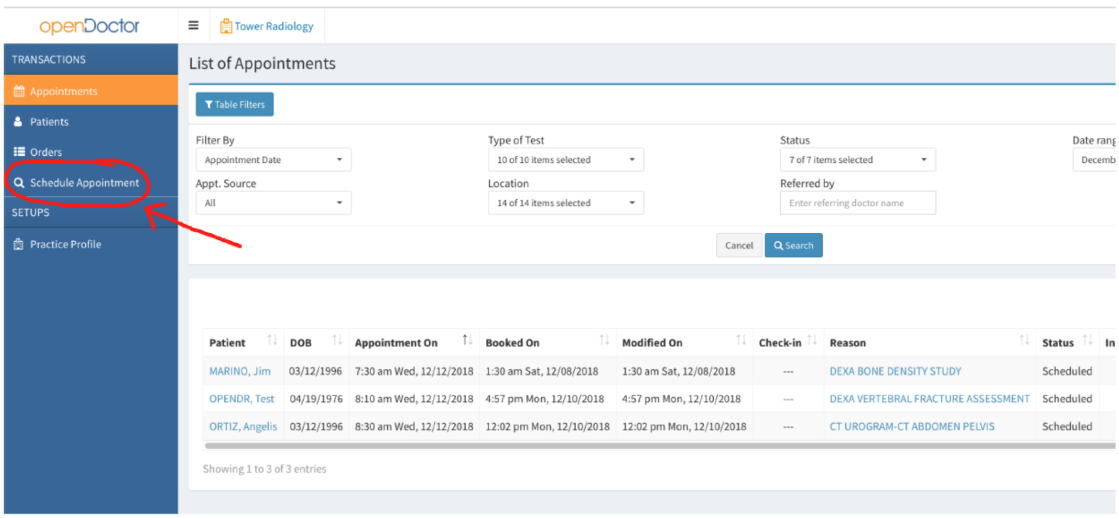
3. Click “Schedule Appointment:



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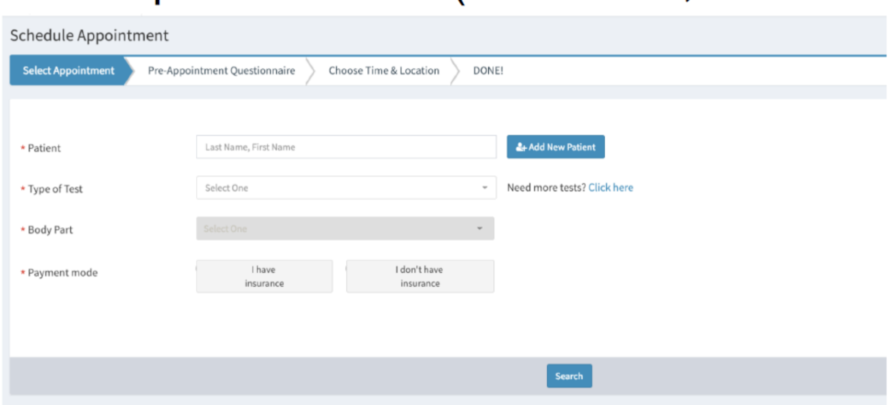
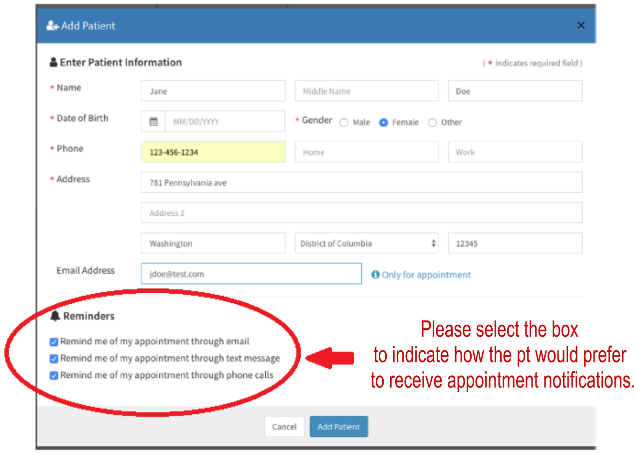
4. Enter patient name (last name, first name)



If patient has been referred by this practice before, their name will populate as you begin typing.

4a. Select "add new patient"



If patient is new to the EMR/RIS and hasn't been referred before, you can enter their information and enroll them.

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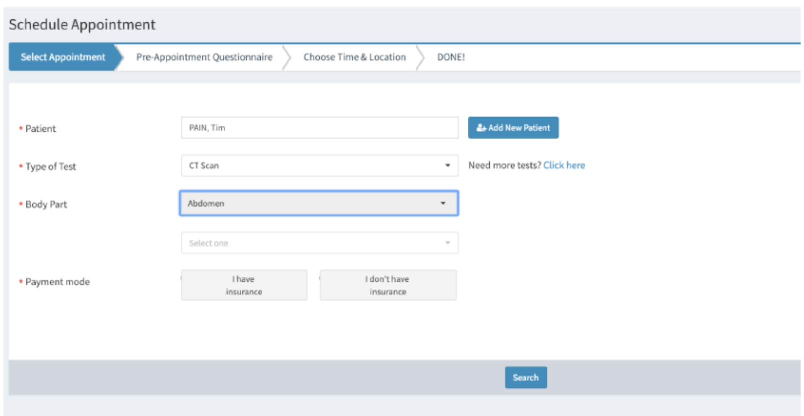
5. Enter in "type of test" and "body part."



You can schedule up to 3 exams at once by selecting "need more tests? Click here."

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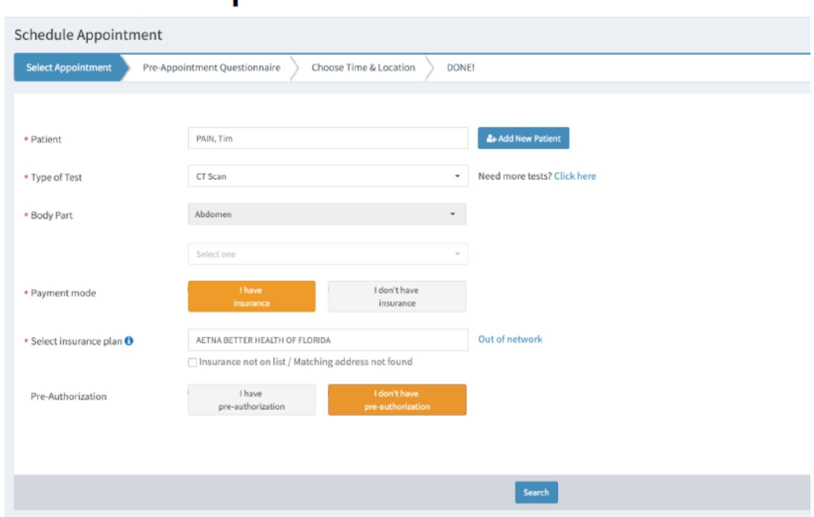
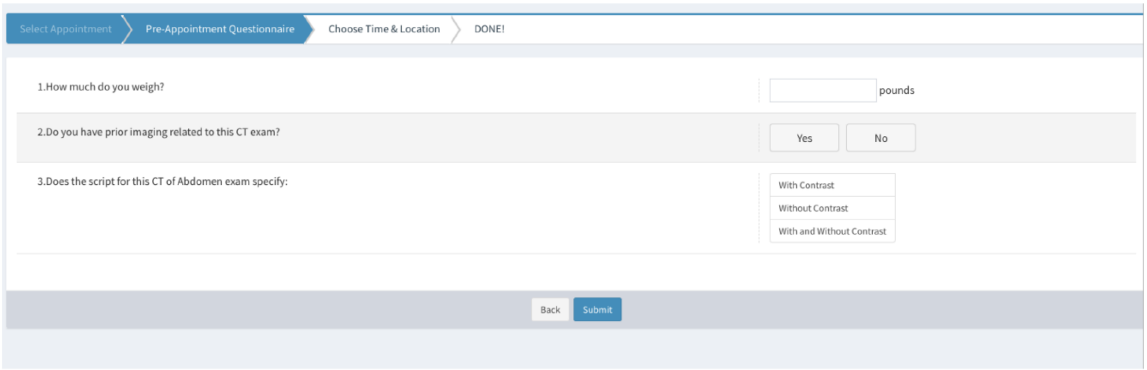
6. Select insurance plan.



7. Answer the pre-appointment questionnaires



The answers to these questions allows the system to determine which specific resource the exam can be booked in.

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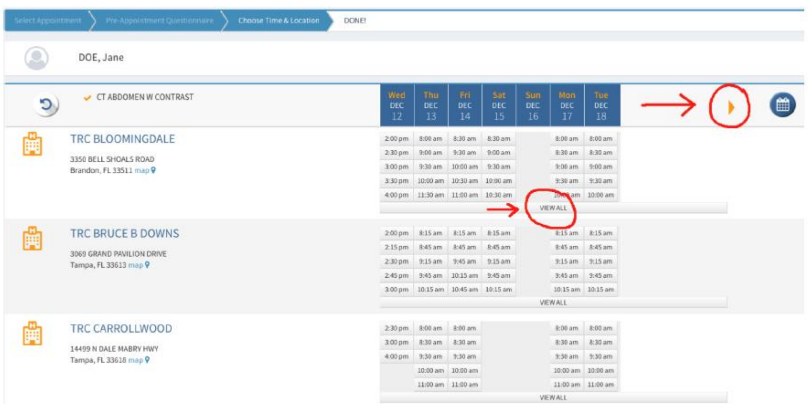
8. Select a location, date and time.



The system displays the *real-time* availability that is reflected in the RIS. You can select “view all” to see the afternoon slots available. To see more dates, you can click the arrow on the top right. Depending on the insurance selected, the appropriate amount of buffer days will be applied in order to provide enough time for the practice to get the prior authorization for this exam.

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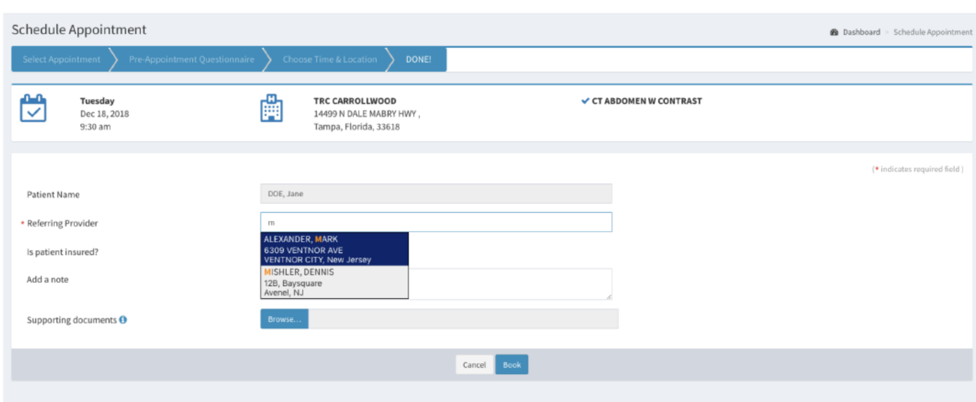
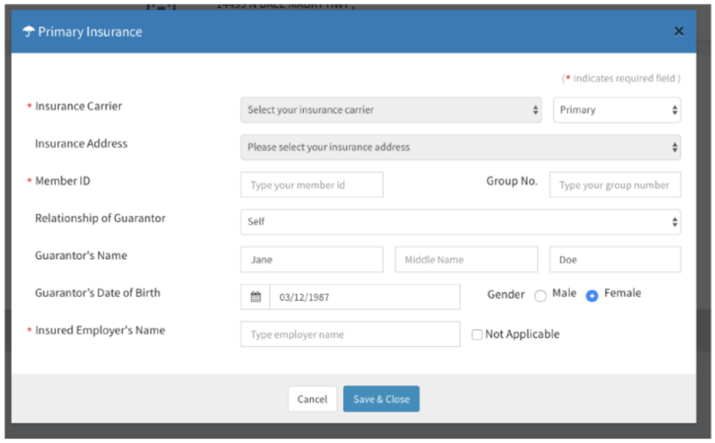
9. Enter your referring provider.



When you begin typing, the providers at your practice will populate. It is important that practice’s update the OD team if a provider is no longer working there in order to remove them from the system immediately.

10. Select the patient's insurance.



If an insurance was selected, you will be prompted to enter member ID, and other insurance information.

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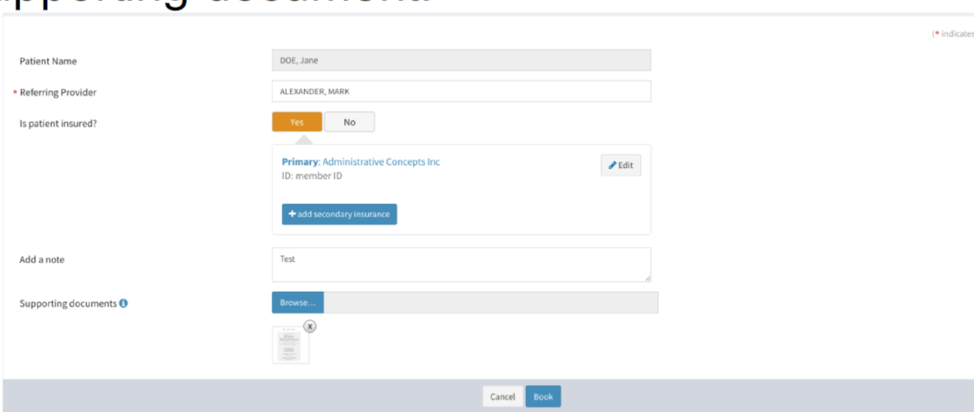
11. Enter a note to the practice (optional) or attach a supporting document.



The "supporting documents" tab accepts PDF, JPEG, JPG, PNG files. You can attach a script, order, report, clinical notes, preauth documentation, etc.

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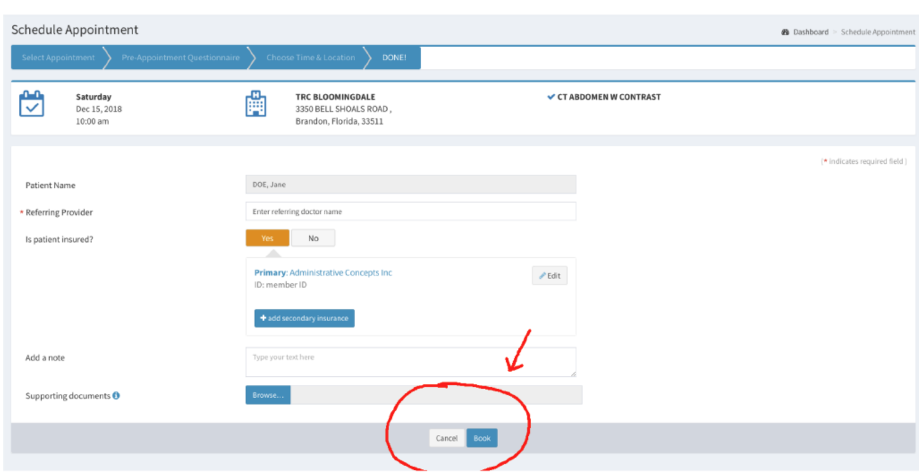
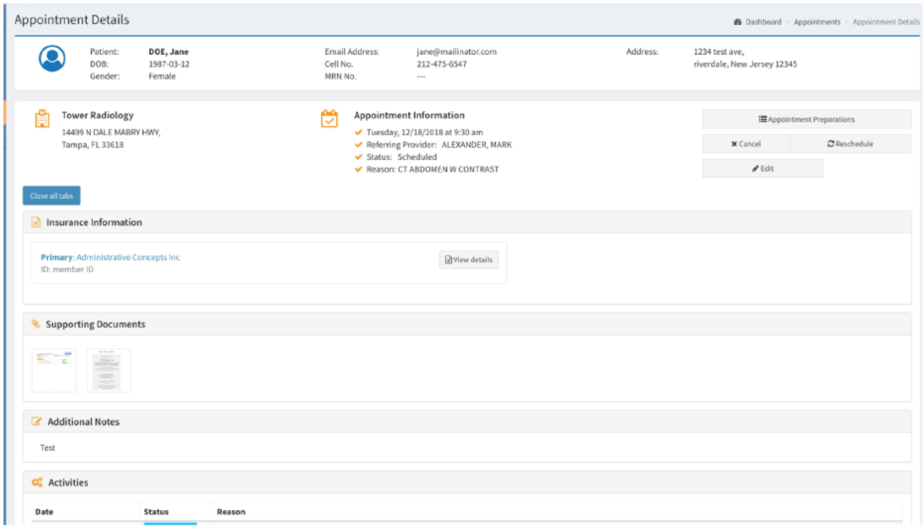
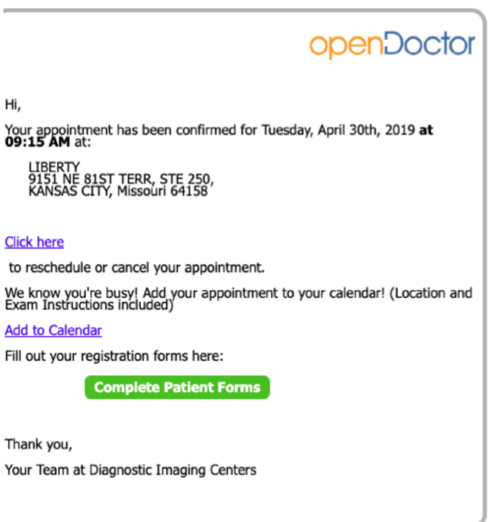
12. Click "book appointment." Appointment is booked online and in the RIS now.



13. You can view summary and details of your appointment.

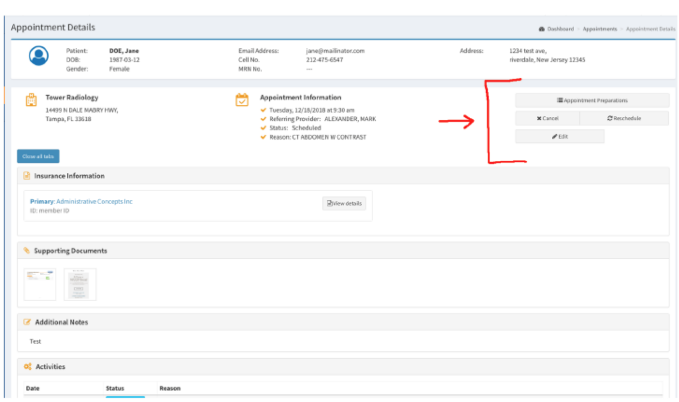


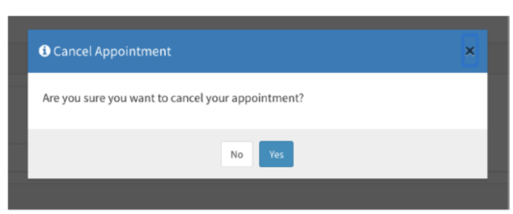
14. Patient will receive a confirmation email once appointment has been booked.



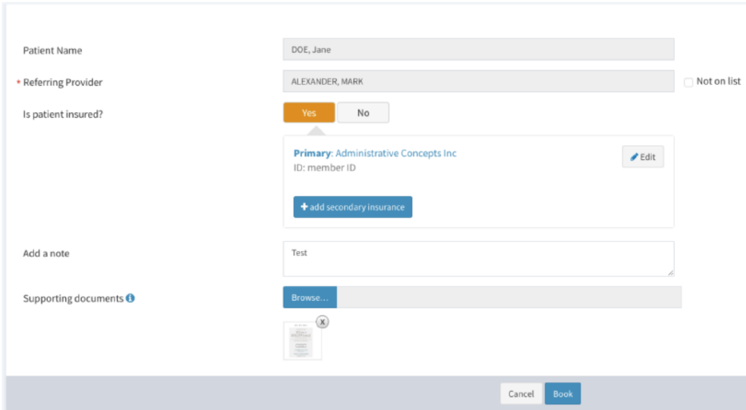
They will also receive a notification if you cancel or reschedule their appointment. The patient could also enroll on the patient scheduling view and their appointment will be reflected there. They can view their appointment preparation or reschedule/cancel their appointment.

15. Cancel or reschedule your appointment here





16. Edit your appointment



If you “edit”, you can change the name of the referring provider, the insurance carrier, or add a new supporting document.

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17. Check on status of appointment

1. Go to patients tab and search by patient name
2. You will be able to see the appointment of the patient and the status associated (scheduled, rescheduled, canceled, arrived, etc) . You should also check under “past appointments” if the appointment date has passed for the patient.
3. When click on appointment, you will even be able to see notes entered by schedulers in RIS. (Note: There is a pending conversation with Fugi to know where this information shows in RIS)