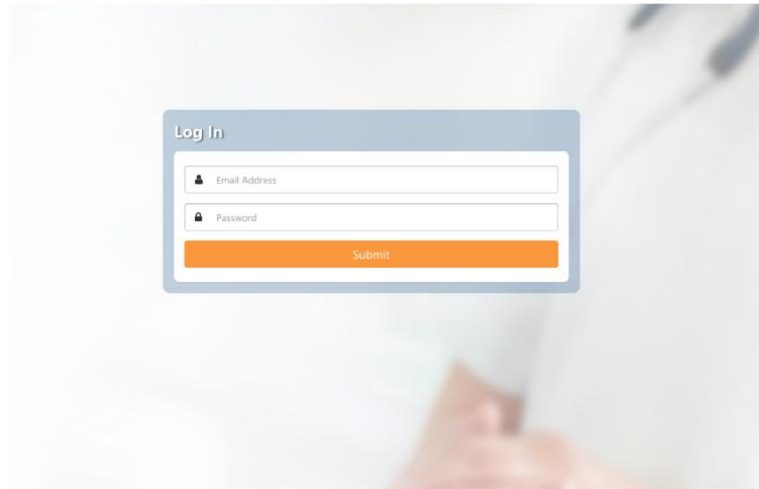


# Referring Scheduler Guide

## 1. Login



1. Go to [portal.opendr.com](https://portal.opendr.com)
2. Login with the unique username and password provided to you. Each scheduler must use their own.

## 2. View Appointments

List of Appointments Dashboard > List of appointments

Table Filters

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

The screenshot shows the 'List of Appointments' interface. A red circle highlights the 'Table Filters' button. Another red circle highlights the 'Column visibility' icon, with three red arrows pointing to it. The filters section includes: Filter By (Appointment Date), Type of Test (10 of 10 items selected), Status (7 of 7 items selected), Date range (December 12, 2018 - December 12, 2018), Appt. Source (All), Location (14 of 14 items selected), and Referred by (Enter referring doctor name). The table below shows 3 entries.

Patient	DOB	Appointment On	Booked On	Modified On	Check-in	Reason	Status	Insurance	Resource
MARINO, Jim	03/12/1996	7:30 am Wed, 12/12/2018	1:30 am Sat, 12/08/2018	1:30 am Sat, 12/08/2018	---	DEXA BONE DENSITY STUDY	Scheduled	Yes	BDC NORTHSIDE (MRI Newtest)
OPENDR, Test	04/19/1976	8:10 am Wed, 12/12/2018	4:57 pm Mon, 12/10/2018	4:57 pm Mon, 12/10/2018	---	DEXA VERTEBRAL FRACTURE ASSESSMENT	Scheduled	Yes	BDC HABANA (BDCH DEXA1)
ORTIZ, Angelis	03/12/1996	8:30 am Wed, 12/12/2018	12:02 pm Mon, 12/10/2018	12:02 pm Mon, 12/10/2018	---	CT UROGRAM-CT ABDOMEN PELVIS	Scheduled	Yes	TRC BLOOMINGDALE (BLM CT1)

Showing 1 to 3 of 3 entries

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

## 3. Click “Schedule Appointment:

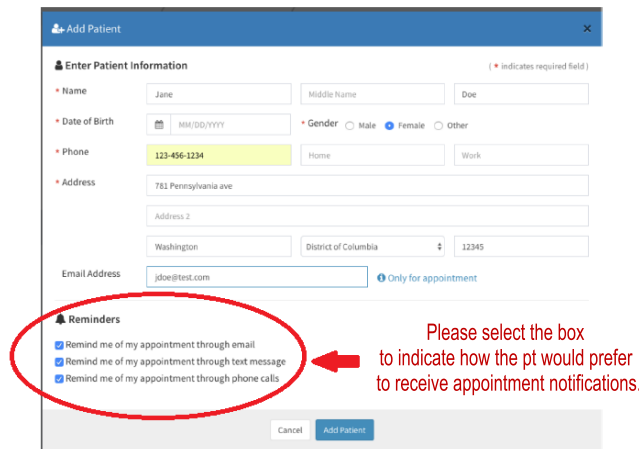
The screenshot shows the openDoctor interface. The 'Schedule Appointment' option in the left sidebar is highlighted with a red circle and a red arrow. The main content area shows the 'List of Appointments' page with the same filters and table as in the previous screenshot.

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

The screenshot shows the 'Schedule Appointment' form. The 'Select Appointment' step is active. The form includes fields for Patient (Last Name, First Name), Type of Test (Select One), Body Part (Select One), and Payment mode (I have insurance, I don't have insurance). A 'Search' button is at the bottom.

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

## 4a. Select “add new patient”

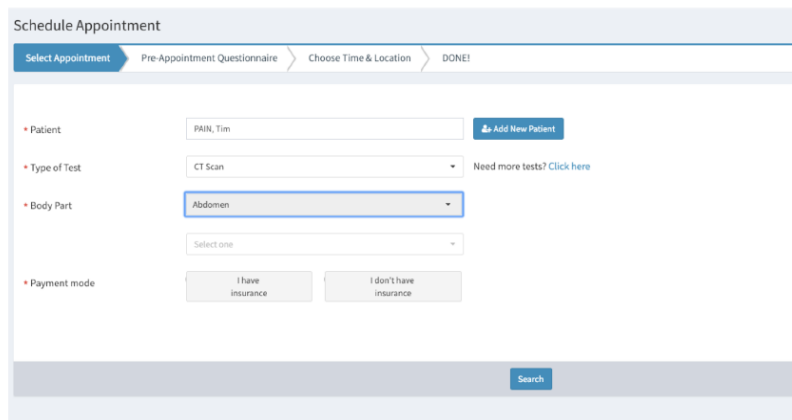


The screenshot shows the 'Add Patient' form. The 'Reminders' section is circled in red, and a red arrow points to it from the text: 'Please select the box to indicate how the pt would prefer to receive appointment notifications.' The 'Reminders' section contains three checkboxes, all of which are checked:

- ☒ Remind me of my appointment through email
- ☒ Remind me of my appointment through text message
- ☒ Remind me of my appointment through phone calls

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

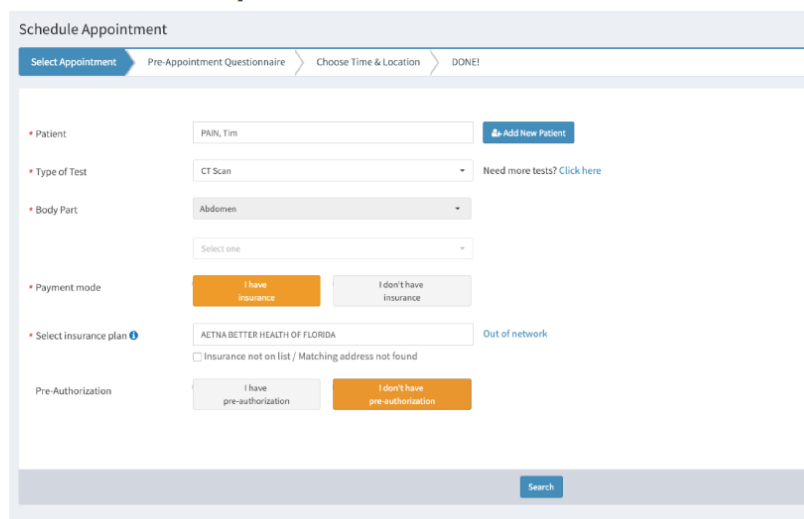
## 5. Enter in “type of test” and “body part.”



The screenshot shows the 'Schedule Appointment' form. The 'Type of Test' field is set to 'CT Scan' and the 'Body Part' field is set to 'Abdomen'. The 'Payment mode' field has two options: 'I have insurance' and 'I don't have insurance'. The 'Search' button is at the bottom right.

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

## 6. Select insurance plan.



The screenshot shows the 'Schedule Appointment' form. The 'Select insurance plan' field is set to 'AETNA BETTER HEALTH OF FLORIDA'. The 'Out of network' checkbox is checked. The 'Pre-authorization' field has two options: 'I have pre-authorization' and 'I don't have pre-authorization'. The 'Search' button is at the bottom right.

## 7. Answer the pre-appointment questionnaires

The screenshot shows a web interface for a pre-appointment questionnaire. At the top, there are four tabs: 'Select Appointment', 'Pre-Appointment Questionnaire' (which is active), 'Choose Time & Location', and 'DONE!'. Below the tabs, there are three questions:

1. How much do you weigh? (with a text input field and 'pounds' label)
2. Do you have prior imaging related to this CT exam? (with 'Yes' and 'No' buttons)
3. Does the script for this CT of Abdomen exam specify: (with a dropdown menu showing 'With Contrast', 'Without Contrast', and 'With and Without Contrast')

At the bottom of the form, there are 'Back' and 'Submit' buttons.

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

## 8. Select a location, date and time.

The screenshot shows the 'Choose Time & Location' screen. At the top, there are four tabs: 'Select Appointment', 'Pre-Appointment Questionnaire', 'Choose Time & Location' (which is active), and 'DONE!'. Below the tabs, the patient's name 'DOE, Jane' is displayed. The main content area shows a list of locations and their available appointment times for 'CT ABDOMEN W CONTRAST'.

Location	RED DEC 12	THU DEC 13	FRI DEC 14	SAT DEC 15	SUN DEC 16	MON DEC 17	TUE DEC 18
TRC BLOOMINGDALE 3355 BELL SIGNALS ROAD Brandon, FL 33511	2:30 pm - 8:00 am 2:30 pm - 9:00 am 9:30 am - 10:00 am 10:30 am - 10:00 am 10:30 am - 11:00 am	8:00 am - 8:30 am 9:30 am - 9:00 am 10:00 am - 9:30 am 10:00 am - 10:30 am 11:00 am - 10:30 am	8:30 am - 8:00 am 9:00 am - 9:30 am 10:00 am - 9:30 am 10:30 am - 10:00 am 11:00 am - 10:30 am	8:00 am - 8:30 am 9:00 am - 9:30 am 10:00 am - 9:30 am 10:30 am - 10:00 am 11:00 am - 10:30 am	8:30 am - 8:00 am 9:00 am - 9:30 am 10:00 am - 9:30 am 10:30 am - 10:00 am 11:00 am - 10:30 am	8:00 am - 8:30 am 9:00 am - 9:30 am 10:00 am - 9:30 am 10:30 am - 10:00 am 11:00 am - 10:30 am	8:30 am - 8:00 am 9:00 am - 9:30 am 10:00 am - 9:30 am 10:30 am - 10:00 am 11:00 am - 10:30 am
TRC BRUCE B DOWNS 3069 GRAND PAULSON DRIVE Tampa, FL 33612	2:30 pm - 8:15 am 2:15 pm - 8:45 am 2:30 pm - 9:15 am 2:40 pm - 9:40 am 3:00 pm - 10:15 am	8:15 am - 8:45 am 8:45 am - 9:15 am 9:15 am - 9:45 am 9:40 am - 10:15 am 10:15 am - 10:45 am	8:45 am - 8:15 am 9:15 am - 9:45 am 9:45 am - 10:15 am 10:15 am - 10:45 am 10:45 am - 11:15 am	8:15 am - 8:45 am 8:45 am - 9:15 am 9:15 am - 9:45 am 9:40 am - 10:15 am 10:15 am - 10:45 am	8:45 am - 8:15 am 9:15 am - 9:45 am 9:45 am - 10:15 am 10:15 am - 10:45 am 10:45 am - 11:15 am	8:15 am - 8:45 am 8:45 am - 9:15 am 9:15 am - 9:45 am 9:40 am - 10:15 am 10:15 am - 10:45 am	8:45 am - 8:15 am 9:15 am - 9:45 am 9:45 am - 10:15 am 10:15 am - 10:45 am 10:45 am - 11:15 am
TRC CARROLLWOOD 14499 N DALE HEBRY HWY Tampa, FL 33618	2:30 pm - 8:00 am 3:00 pm - 8:30 am 4:00 pm - 9:30 am 10:00 am - 10:00 am 11:00 am - 11:00 am	8:00 am - 8:30 am 8:30 am - 9:00 am 9:30 am - 10:00 am 10:00 am - 10:30 am 11:00 am - 11:00 am	8:30 am - 8:00 am 9:00 am - 9:30 am 10:00 am - 10:30 am 10:30 am - 10:00 am 11:00 am - 11:00 am	8:00 am - 8:30 am 8:30 am - 9:00 am 9:30 am - 10:00 am 10:00 am - 10:30 am 11:00 am - 11:00 am	8:30 am - 8:00 am 9:00 am - 9:30 am 10:00 am - 10:30 am 10:30 am - 10:00 am 11:00 am - 11:00 am	8:00 am - 8:30 am 8:30 am - 9:00 am 9:30 am - 10:00 am 10:00 am - 10:30 am 11:00 am - 11:00 am	8:30 am - 8:00 am 9:00 am - 9:30 am 10:00 am - 10:30 am 10:30 am - 10:00 am 11:00 am - 11:00 am

Red arrows point to the 'view all' link and the 'view all' button.

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.

## 9. Enter your referring provider.

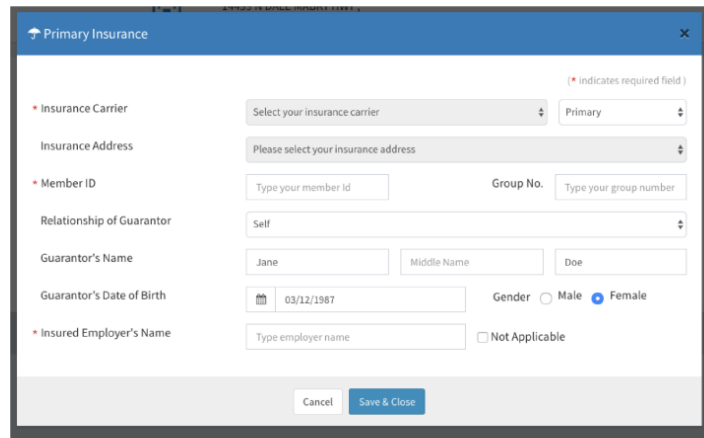
The screenshot shows the 'Schedule Appointment' screen. At the top, there are four tabs: 'Select Appointment', 'Pre-Appointment Questionnaire', 'Choose Time & Location', and 'DONE!'. Below the tabs, the patient's name 'DOE, Jane' is displayed. The main content area shows the appointment details for 'CT ABDOMEN W CONTRAST' on Tuesday, Dec 18, 2018, at 9:30 am, at the TRC CARROLLWOOD location (14499 N DALE HEBRY HWY, Tampa, Florida, 33618).

The 'Referring Provider' field is populated with 'ALEXANDER, MARK' (6309 VENTNOR AVE, VENTNOR CITY, New Jersey). The 'Is patient insured?' field is populated with 'HISLER, DENNIS' (128, Baysquare Avenue, NJ). The 'Add a note' field is empty. The 'Supporting documents' field is empty.

At the bottom, there are 'Cancel' and 'Book' buttons.

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.



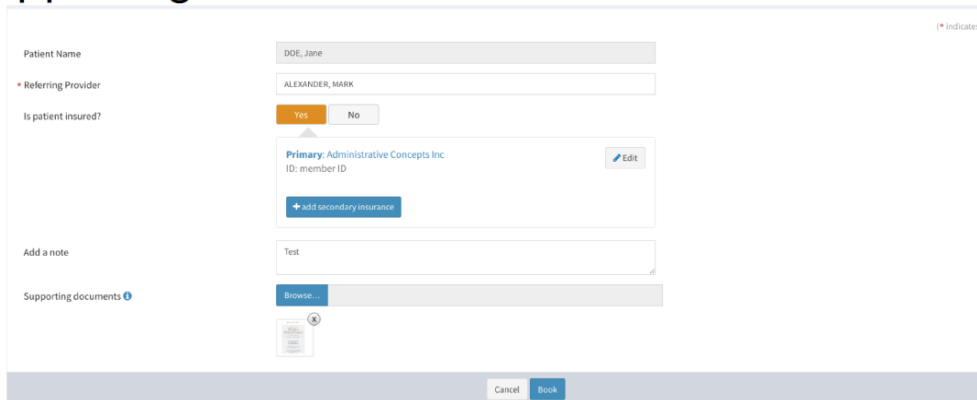
The 'Primary Insurance' form contains the following fields:

- Insurance Carrier:** A dropdown menu with 'Primary' selected.
- Insurance Address:** A dropdown menu with 'Please select your insurance address'.
- Member ID:** A text input field.
- Group No.:** A text input field.
- Relationship of Guarantor:** A dropdown menu with 'Self' selected.
- Guarantor's Name:** Three text input fields for 'Jane', 'Middle Name', and 'Doe'.
- Guarantor's Date of Birth:** A date input field with '03/12/1967'.
- Gender:** Radio buttons for 'Male' and 'Female', with 'Female' selected.
- Insured Employer's Name:** A text input field with 'Type employer name' and a checkbox for 'Not Applicable'.

Buttons at the bottom: 'Cancel' and 'Save & Close'.

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

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



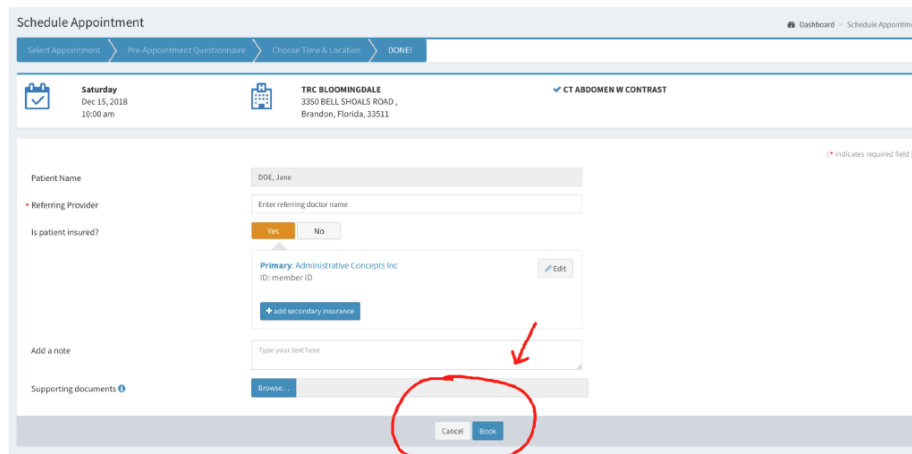
The form displays patient information and options for adding notes or documents:

- Patient Name:** DOE, Jane
- Referring Provider:** ALEANDER, MARK
- Is patient insured?** Yes (selected) / No
- Primary Insurance:** Administrative Concepts Inc. ID: member ID. Includes an 'Edit' button and a '+ add secondary insurance' button.
- Add a note:** A text input field with 'Test'.
- Supporting documents:** A 'Browse...' button and a file upload icon.

Buttons at the bottom: 'Cancel' and 'Book'.

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

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



The 'Schedule Appointment' form shows appointment details and booking options:

- Appointment Details:** Saturday Dec 15, 2018 10:00 am, TRC BLOOMINGDALE 3350 BELL SHOALS ROAD, Brandon, Florida 33511, CT ABDOMEN W CONTRAST.
- Patient Name:** DOE, Jane
- Referring Provider:** Enter referring doctor name
- Is patient insured?** Yes (selected) / No
- Primary Insurance:** Administrative Concepts Inc. ID: member ID. Includes an 'Edit' button and a '+ add secondary insurance' button.
- Add a note:** A text input field with 'Type your text here'.
- Supporting documents:** A 'Browse...' button and a file upload icon.

Buttons at the bottom: 'Cancel' and 'Book'. A red circle and arrow highlight the 'Book' button.

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

The screenshot shows the 'Appointment Details' page for a patient named DOE, Jane. The page is divided into several sections: Patient Information (DOB: 1987-03-12, Gender: Female, Email Address: jane@mailinator.com, Address: 1234 test ave, riverdale, New Jersey 12345), Tower Radiology (34499 N DALE MADDY HWY, Tampa, FL 33618), Appointment Information (Tuesday, 12/18/2018 at 9:30 am, Referring Provider: ALEXANDER, MARK, Status: Scheduled, Reason: CT ABDOMEN W CONTRAST), Insurance Information (Primary: Administrative Concepts Inc, ID: member ID), Supporting Documents, Additional Notes, and Activities. On the right side, there are buttons for 'Appointment Preparations', 'Cancel', 'Reschedule', and 'Edit'.

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

The screenshot shows a confirmation email from openDoctor. The email content includes: 'Hi, Your appointment has been confirmed for Tuesday, April 30th, 2019 at 09:15 AM at: LIBERTY 9151 NE 81ST TERR, STE 250, KANSAS CITY, Missouri 64158'. It also contains links to 'Click here to reschedule or cancel your appointment.' and 'Add to Calendar'. A green button labeled 'Complete Patient Forms' is present. The email ends with 'Thank you, Your Team at Diagnostic Imaging Centers'.

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

This screenshot is identical to the one in step 13, showing the 'Appointment Details' page. A red arrow points to the 'Cancel' button in the 'Appointment Preparations' section on the right side of the page.

The screenshot shows a modal dialog box titled 'Cancel Appointment'. It contains the question 'Are you sure you want to cancel your appointment?' and two buttons: 'No' and 'Yes'.

## 16. Edit your appointment

Patient Name: DOE, Jane

Referring Provider: ALEXANDER, MARK ☐ Not on list

Is patient insured?

Primary: Administrative Concepts Inc  
ID: member ID [Edit](#)

[+ add secondary insurance](#)

Add a note: Text

Supporting documents [Browse...](#)

[Cancel](#) [Book](#)

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

## 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 Fugui to know where this information shows in RIS)

**Additional Notes**

Q/A w ok/ep humana 1135857901 778614 LEFT SHOULDER PAIN DW 7 2 19 no priors DW 7 5 19 confirmed appt

**Activities**

Date	Status	Reason
07/06/2019 10:21 am	Arrived	Appointment > MRI SHOULDER LEFT WITH CONTRAST by LIBMEL, LIBERTY
07/05/2019 12:04 pm	Modified	Appointment > MRI SHOULDER LEFT WITH CONTRAST by LIBMEL, LIBERTY
07/03/2019 10:11 am	Modified	Appointment > MRI SHOULDER LEFT WITH CONTRAST by LIBMEL, LIBERTY
07/02/2019 02:17 pm	Modified	Appointment > MRI SHOULDER LEFT WITH CONTRAST by LIBMEL, LIBERTY
07/02/2019 12:05 pm	Scheduled	Appointment > MRI SHOULDER LEFT WITH CONTRAST

**Notifications**