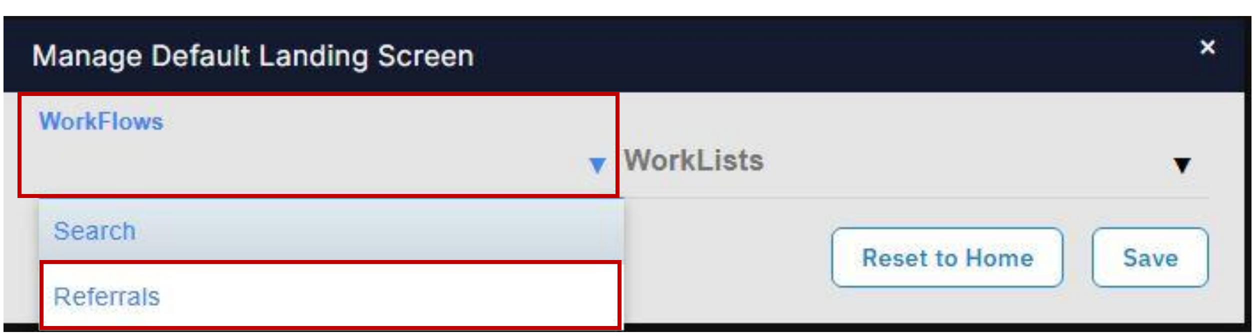
Referring Portal Walkthrough

The updated referring portal now has two total workflows. “Historical Search” and “Patient Search 2020-Present.”

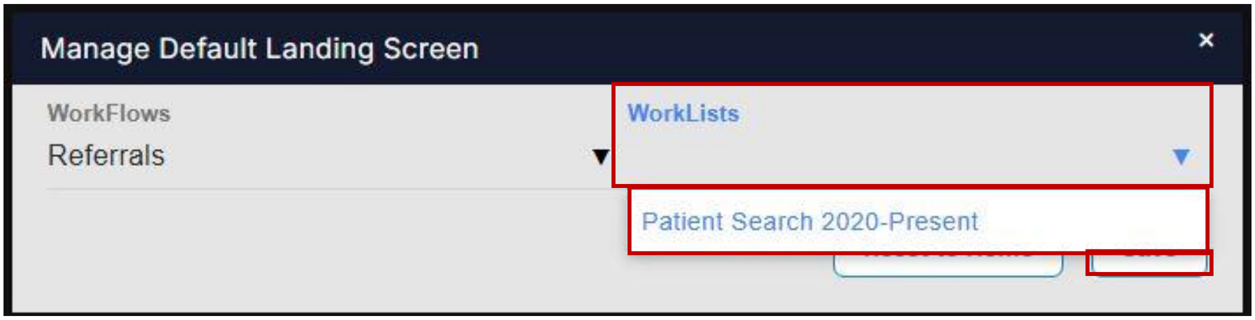
Blank Screen Fix

If your login loads blank like the above image, you can fix this by setting your “Manage Default Landing Screen”. To do this, click on the profile in the top right. Then, select “Manage Default Landing Screen.”

First, click on workflows and select “Referrals” from the drop down

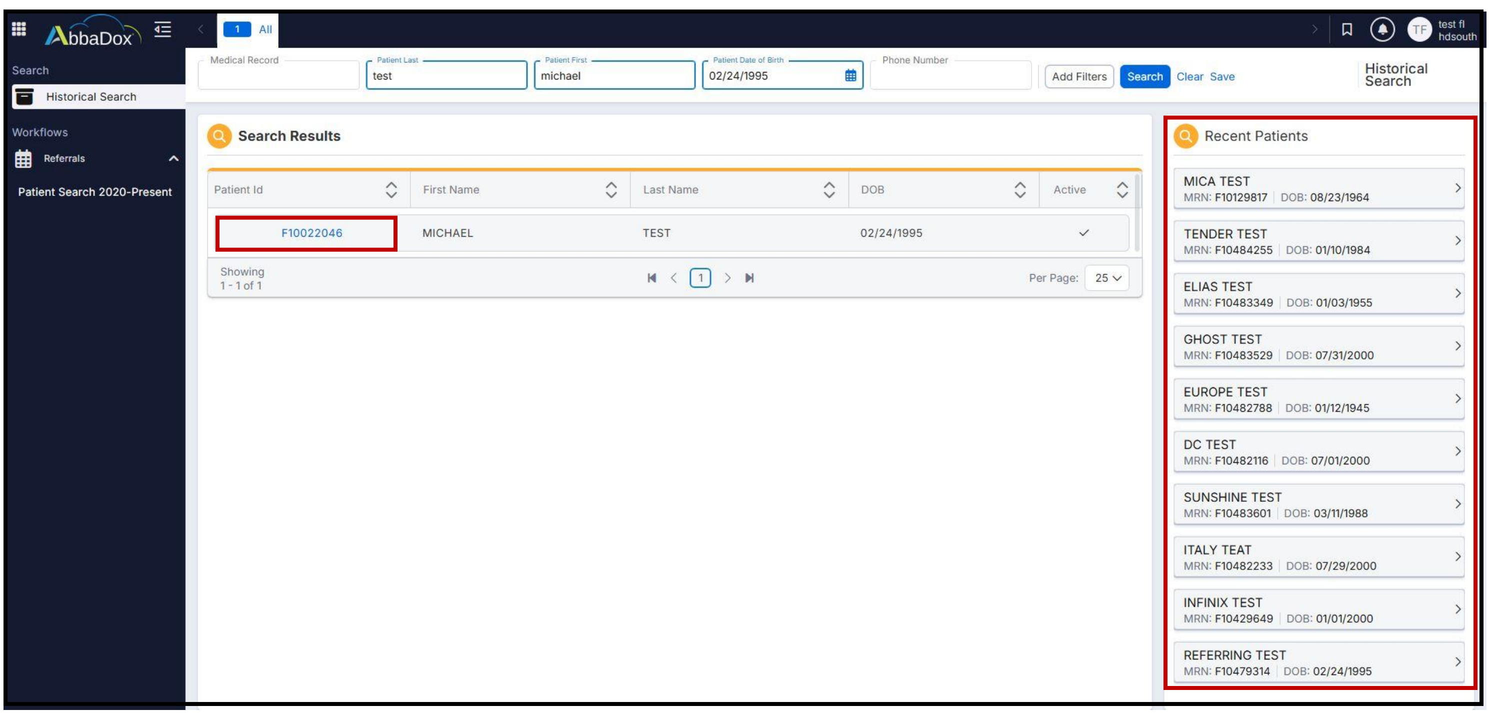


Then, click on “WorkLists” and “Patient Search 2020-Present” from the dropdown, and click “Save.” Next time you log into the system, it will default to display all patients of the doctors associated with the account.

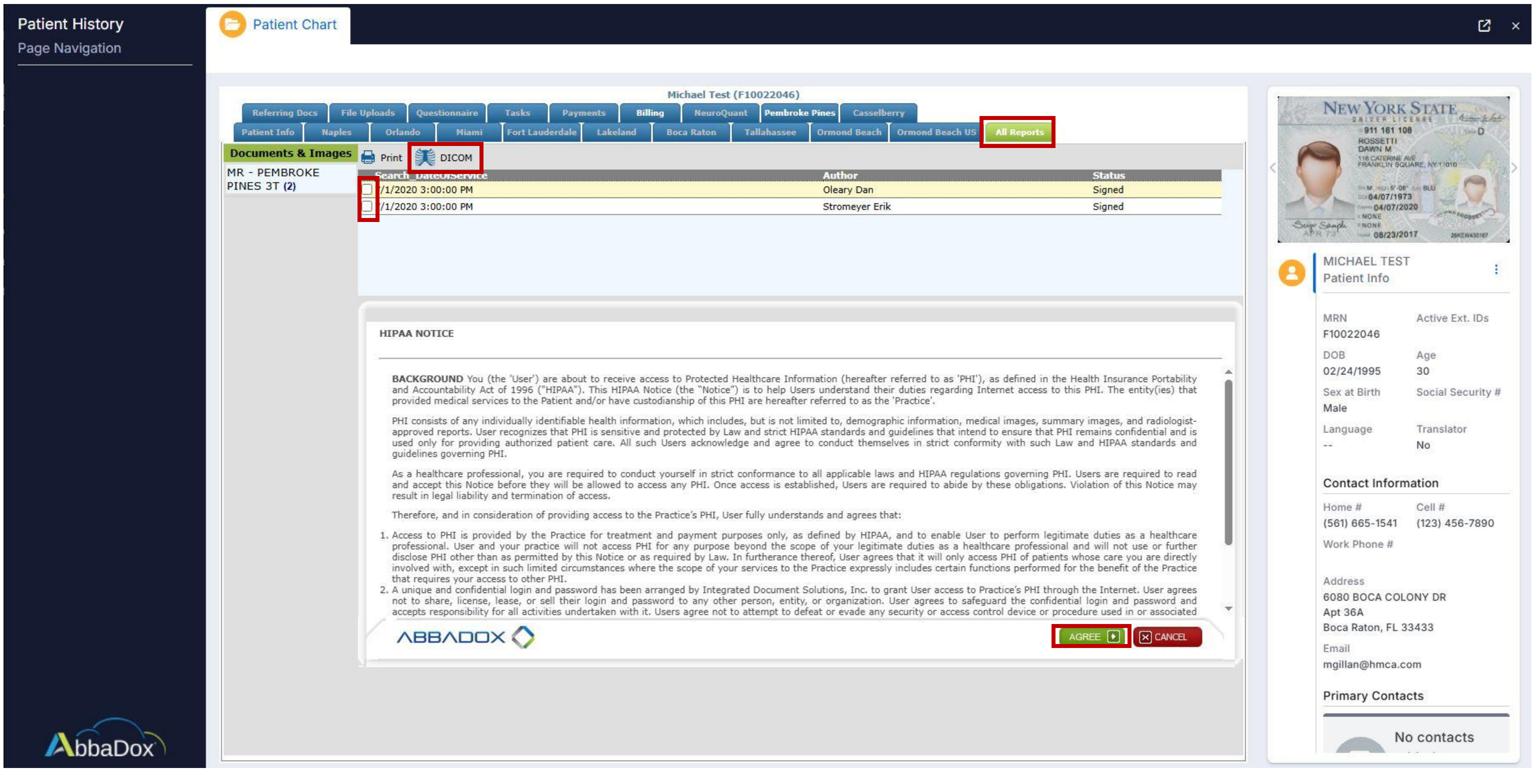


Historical Search

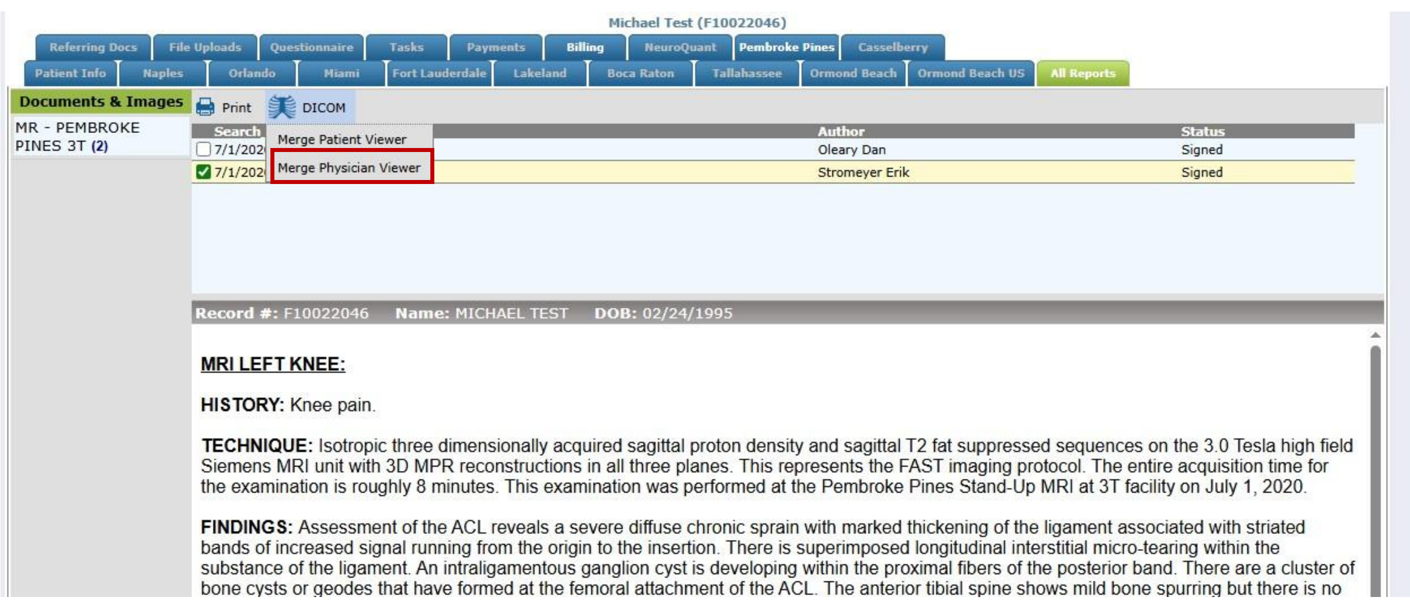
In the “Historical Search” you must search by date of birth, and full first and last name. This search will pull up any patients that match the search. You can also view your last 10 patients. Click on the blue patient’s ID# to open the patient’s chart.



Click on “All Reports” to bring up all scans the patient has completed. Click “Agree” on the HIPAA notice to quick view the reports. To view the images, check off any of the check boxes and click “DICOM.”

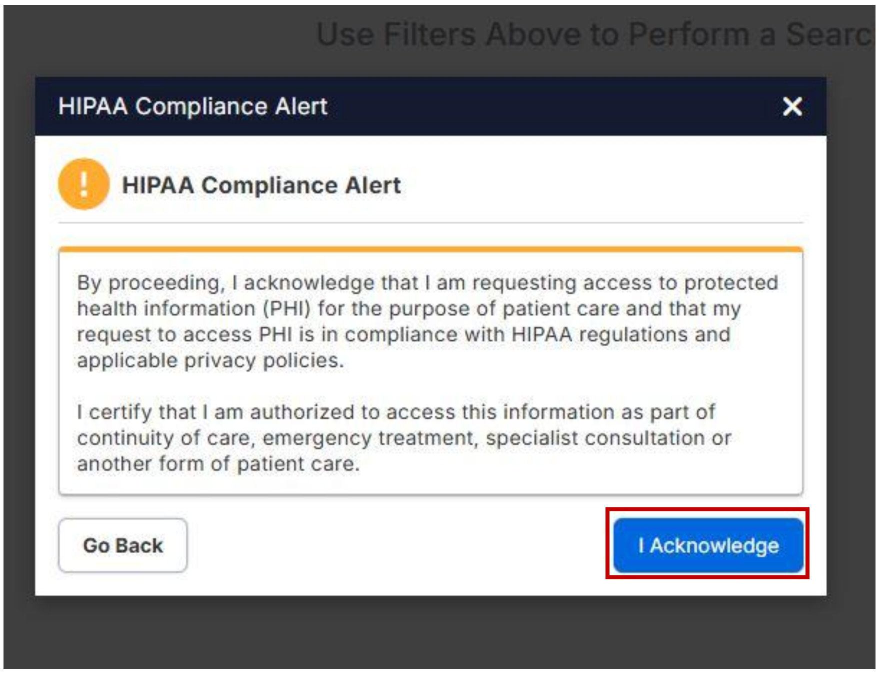


Click on “Merge Physician Viewer” to open the image viewer (pg.12).

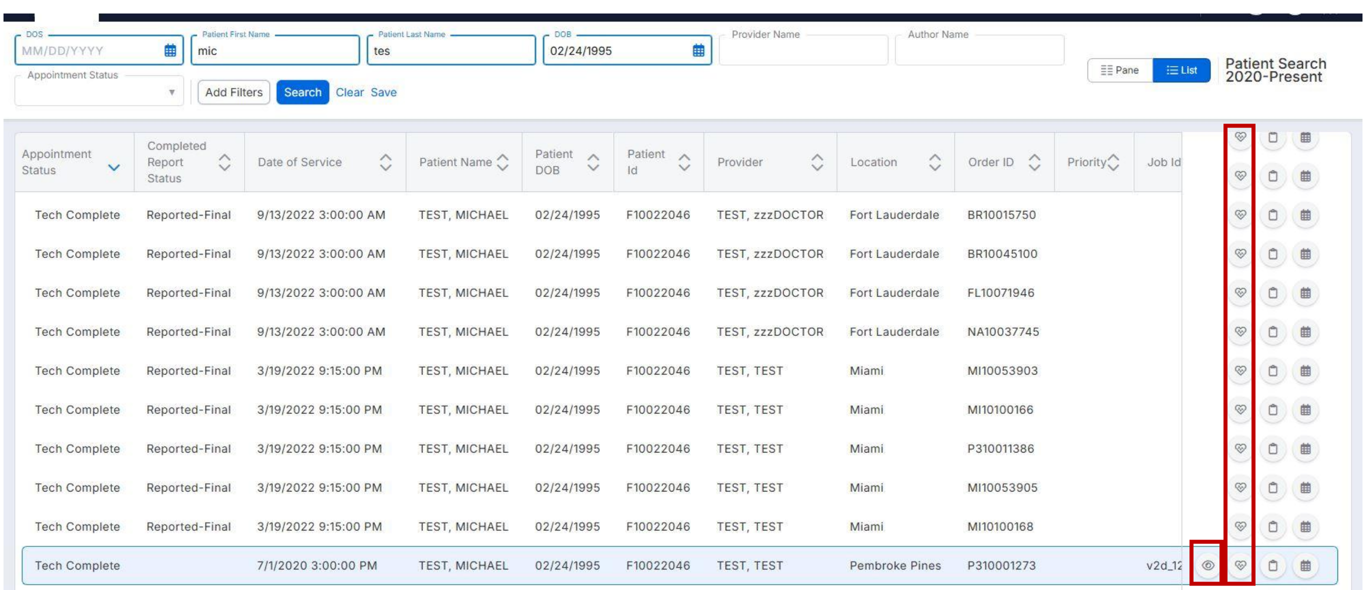


Patient Search 2020-present

In the "Patient Search 2020-Present," you will see all of the patients from the doctors associated with the account. Your patients can be searched by just DOB or the first three of the first and last name. You can also search for any patient by date of birth, and the first three of the first and last name. When you first search for a patient this way in each session you will get the following pop up. Click "I Acknowledge."

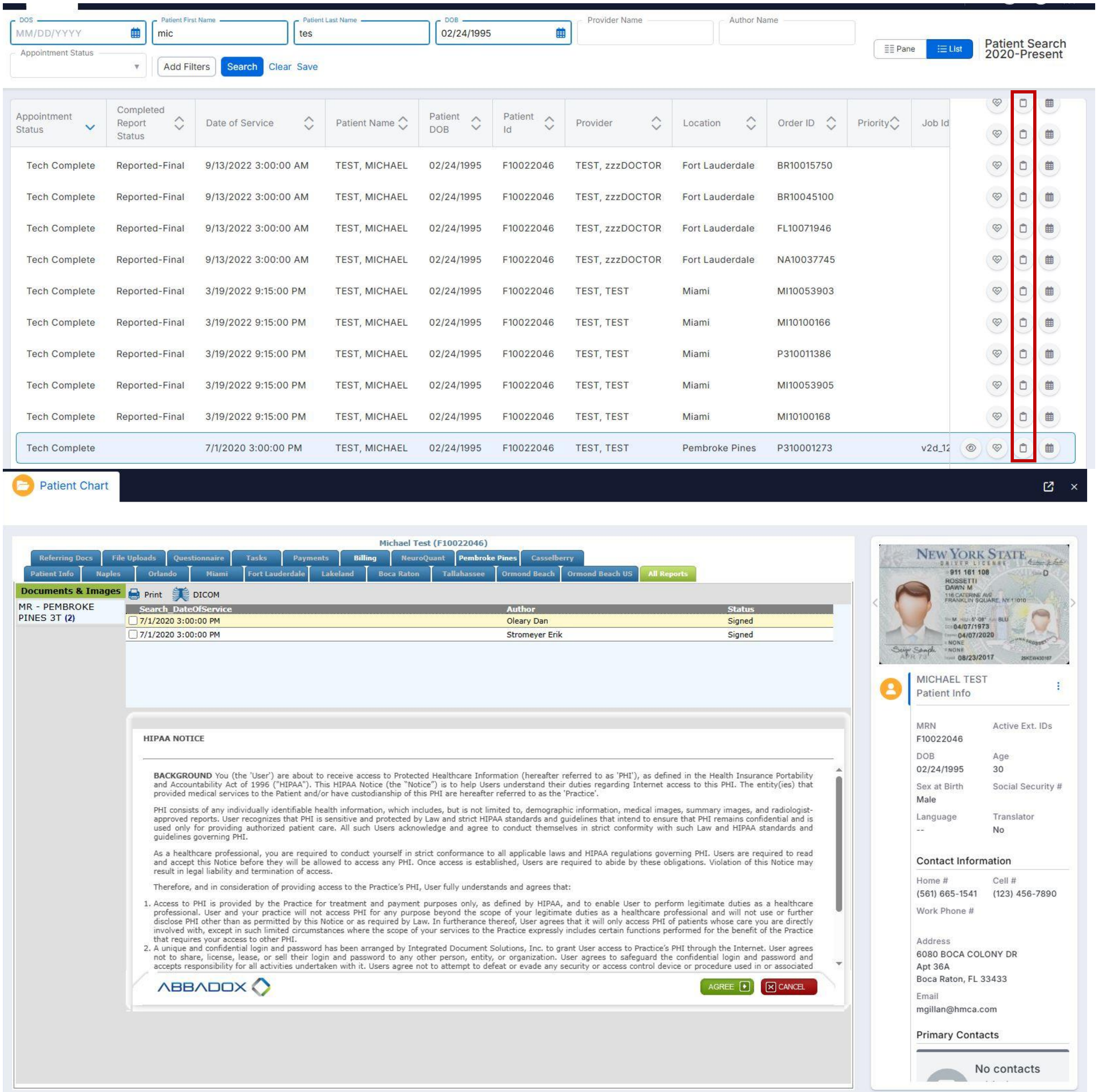


Click the  icon to view the report. Click on the icon to view the image viewer (pg.12).

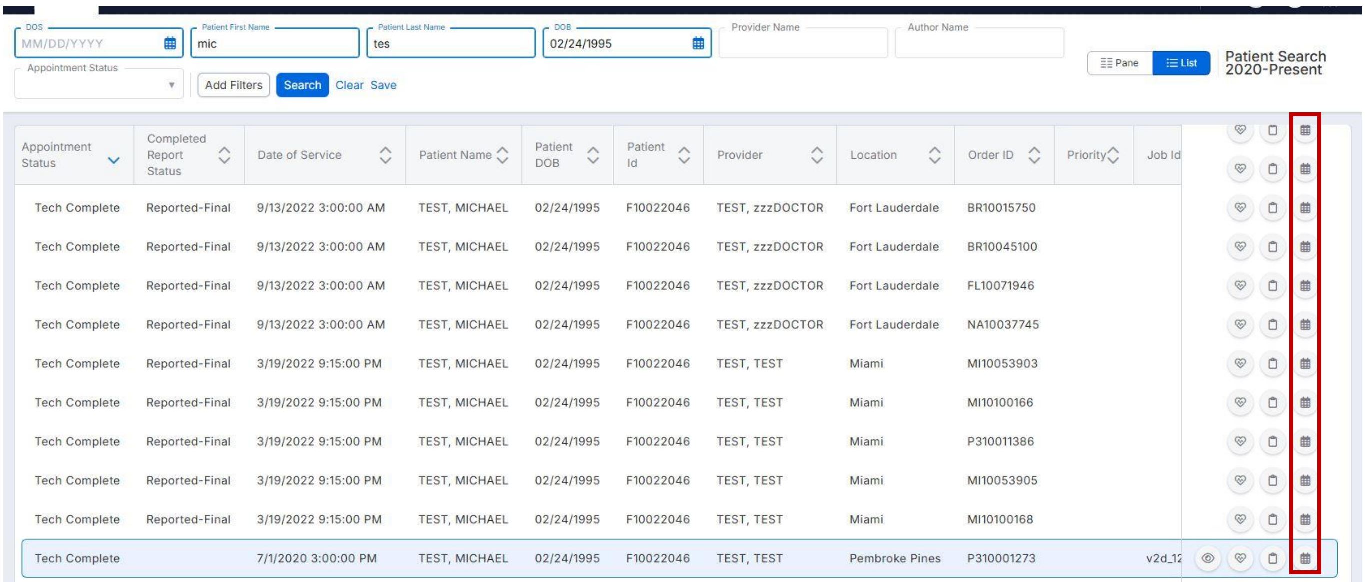


Appointment Status	Completed Report Status	Date of Service	Patient Name	Patient DOB	Patient Id	Provider	Location	Order ID	Priority	Job Id
Tech Complete	Reported-Final	9/13/2022 3:00:00 AM	TEST, MICHAEL	02/24/1995	F10022046	TEST, zzzDOCTOR	Fort Lauderdale	BR10015750		
Tech Complete	Reported-Final	9/13/2022 3:00:00 AM	TEST, MICHAEL	02/24/1995	F10022046	TEST, zzzDOCTOR	Fort Lauderdale	BR10045100		
Tech Complete	Reported-Final	9/13/2022 3:00:00 AM	TEST, MICHAEL	02/24/1995	F10022046	TEST, zzzDOCTOR	Fort Lauderdale	FL10071946		
Tech Complete	Reported-Final	9/13/2022 3:00:00 AM	TEST, MICHAEL	02/24/1995	F10022046	TEST, zzzDOCTOR	Fort Lauderdale	NA10037745		
Tech Complete	Reported-Final	3/19/2022 9:15:00 PM	TEST, MICHAEL	02/24/1995	F10022046	TEST, TEST	Miami	MI10053903		
Tech Complete	Reported-Final	3/19/2022 9:15:00 PM	TEST, MICHAEL	02/24/1995	F10022046	TEST, TEST	Miami	MI10100166		
Tech Complete	Reported-Final	3/19/2022 9:15:00 PM	TEST, MICHAEL	02/24/1995	F10022046	TEST, TEST	Miami	P310011386		
Tech Complete	Reported-Final	3/19/2022 9:15:00 PM	TEST, MICHAEL	02/24/1995	F10022046	TEST, TEST	Miami	MI10053905		
Tech Complete	Reported-Final	3/19/2022 9:15:00 PM	TEST, MICHAEL	02/24/1995	F10022046	TEST, TEST	Miami	MI10100168		
Tech Complete		7/1/2020 3:00:00 PM	TEST, MICHAEL	02/24/1995	F10022046	TEST, TEST	Pembroke Pines	P310001273		v2d_12

Click the icon to view the patient's chart.

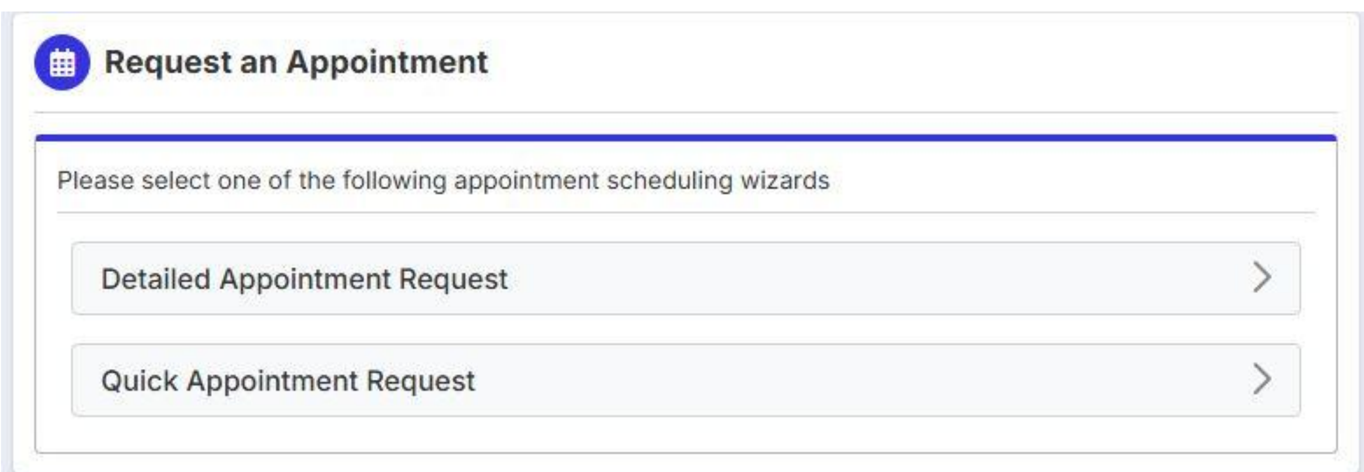


Click the icon to place the patient on our pending list to be scheduled, pre-loaded with the patient's info.



Appointment Status	Completed Report Status	Date of Service	Patient Name	Patient DOB	Patient Id	Provider	Location	Order ID	Priority	Job Id
Tech Complete	Reported-Final	9/13/2022 3:00:00 AM	TEST, MICHAEL	02/24/1995	F10022046	TEST, zzzDOCTOR	Fort Lauderdale	BR10015750		
Tech Complete	Reported-Final	9/13/2022 3:00:00 AM	TEST, MICHAEL	02/24/1995	F10022046	TEST, zzzDOCTOR	Fort Lauderdale	BR10045100		
Tech Complete	Reported-Final	9/13/2022 3:00:00 AM	TEST, MICHAEL	02/24/1995	F10022046	TEST, zzzDOCTOR	Fort Lauderdale	FL10071946		
Tech Complete	Reported-Final	9/13/2022 3:00:00 AM	TEST, MICHAEL	02/24/1995	F10022046	TEST, zzzDOCTOR	Fort Lauderdale	NA10037745		
Tech Complete	Reported-Final	3/19/2022 9:15:00 PM	TEST, MICHAEL	02/24/1995	F10022046	TEST, TEST	Miami	MI10053903		
Tech Complete	Reported-Final	3/19/2022 9:15:00 PM	TEST, MICHAEL	02/24/1995	F10022046	TEST, TEST	Miami	MI10100166		
Tech Complete	Reported-Final	3/19/2022 9:15:00 PM	TEST, MICHAEL	02/24/1995	F10022046	TEST, TEST	Miami	P310011386		
Tech Complete	Reported-Final	3/19/2022 9:15:00 PM	TEST, MICHAEL	02/24/1995	F10022046	TEST, TEST	Miami	MI10053905		
Tech Complete	Reported-Final	3/19/2022 9:15:00 PM	TEST, MICHAEL	02/24/1995	F10022046	TEST, TEST	Miami	MI10100168		
Tech Complete		7/1/2020 3:00:00 PM	TEST, MICHAEL	02/24/1995	F10022046	TEST, TEST	Pembroke Pines	P310001273		v2d_12

There are two options to place the patient on the pending list. "Detailed Appointment Request," a four step process to request an appointment (pg.16) and "Quick Appointment Request," a two step process to request an appointment (pg.19).

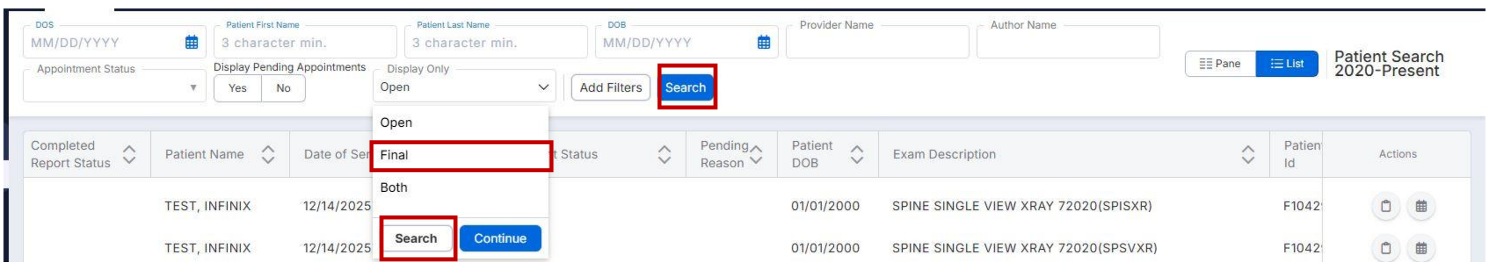


Filters

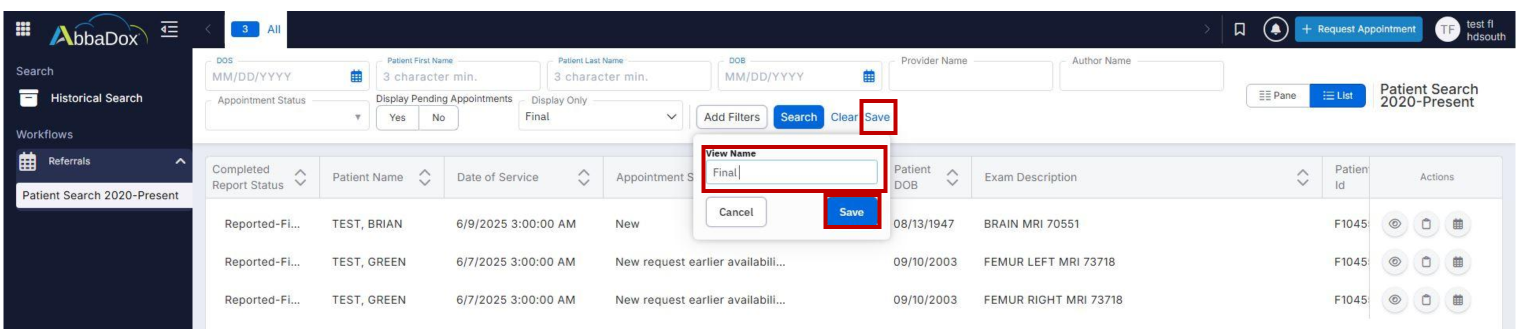
Setting filters will help reduce loading speed and make the system smoother and faster. We recommend creating four filters. One filter for final appointments, one filter for open appointments, one filter for no shows, and one filter for all to search for other patients not referred by doctors associated with the account. You can also create any additional filters as needed. The first step to creating a filter is to set the parameters.

Final Results

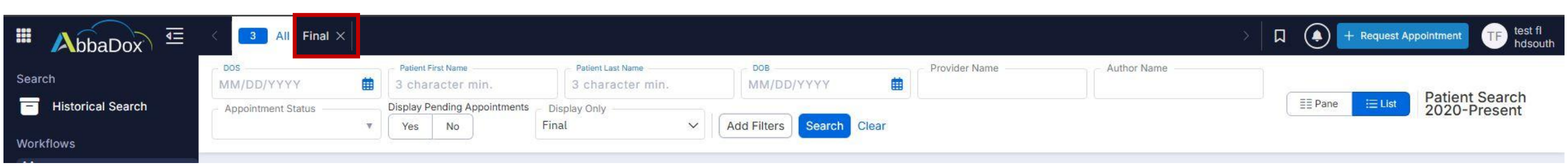
For final results, the only filter needed is to select “Final” under “Display Only” and click on “Search”.



This will display all appointments for patients associated with a referring doctor attached to the portal with a finalized report for the last 60 days. To save the filter click “Save” and name the filter.

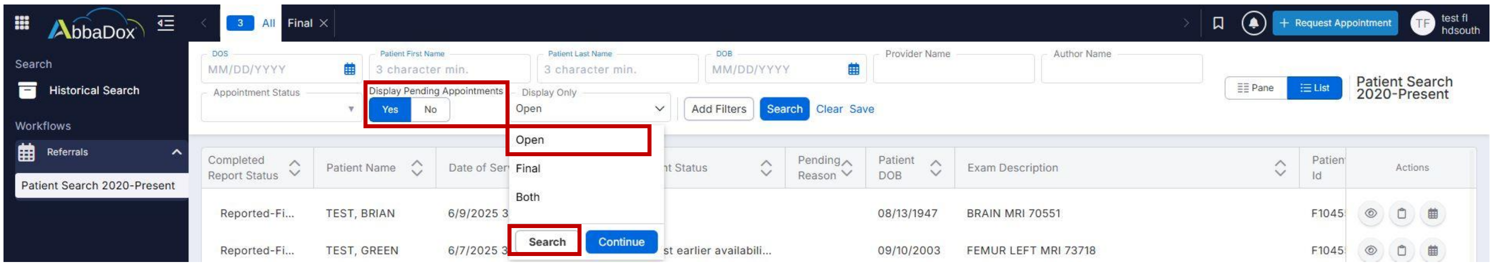


This will create the filter displayed at the top of the screen.

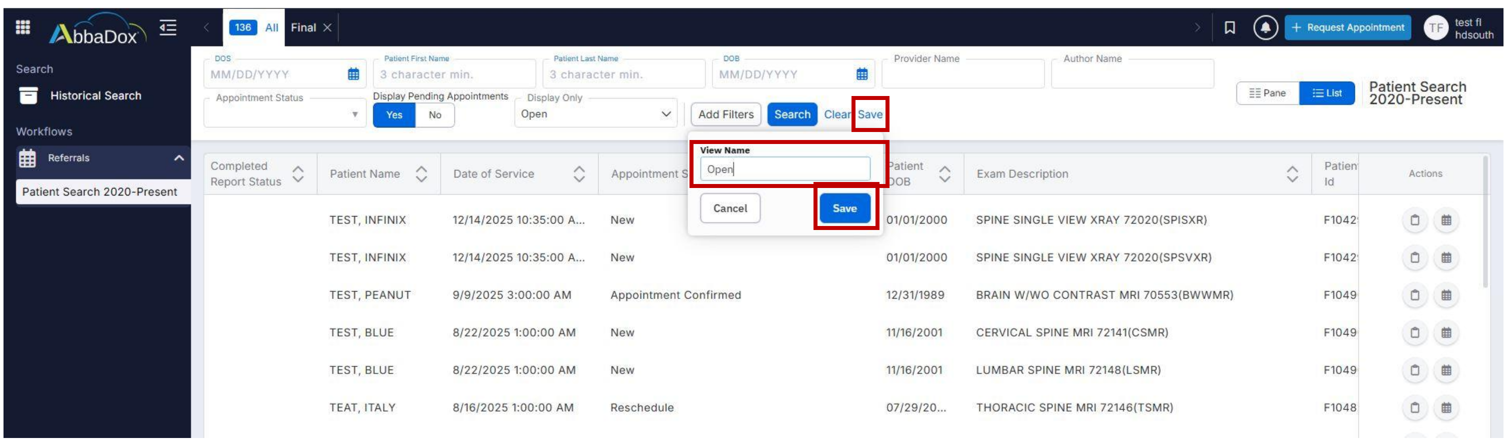


Open Appointments

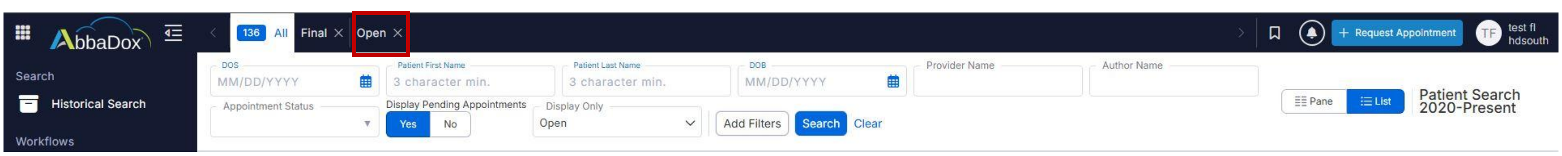
For open appointments, select “Open” under “Display Only.” Also, check off “Yes” under “Display Pending Appointments” and click on “Search.”



This will display all appointments for patients associated with a referring doctor attached to the portal not yet finalized on the schedule including pending appointments. To save the filter, click “Save,” and name the filter.

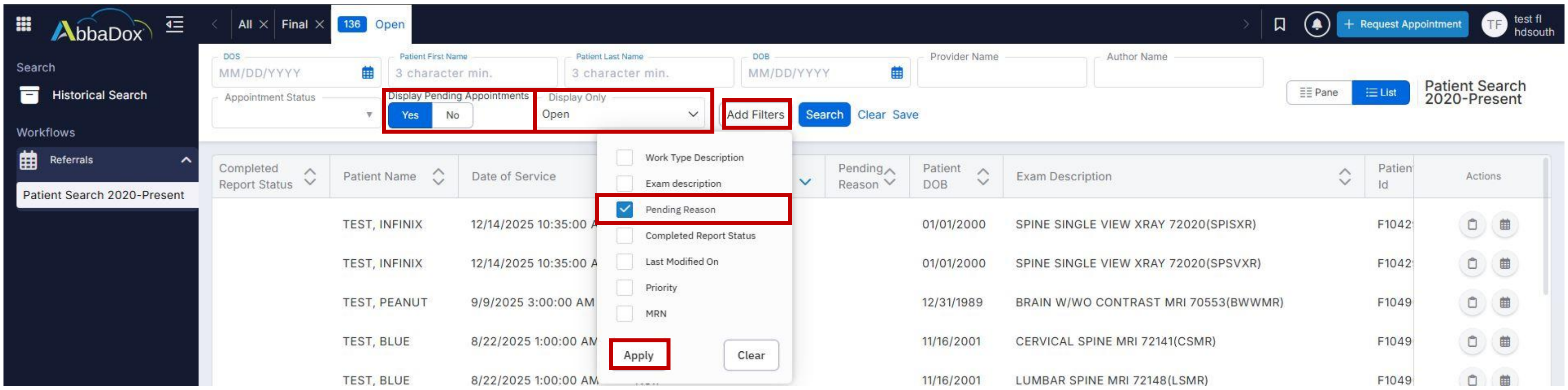


This will create the filter displayed at the top of the screen.

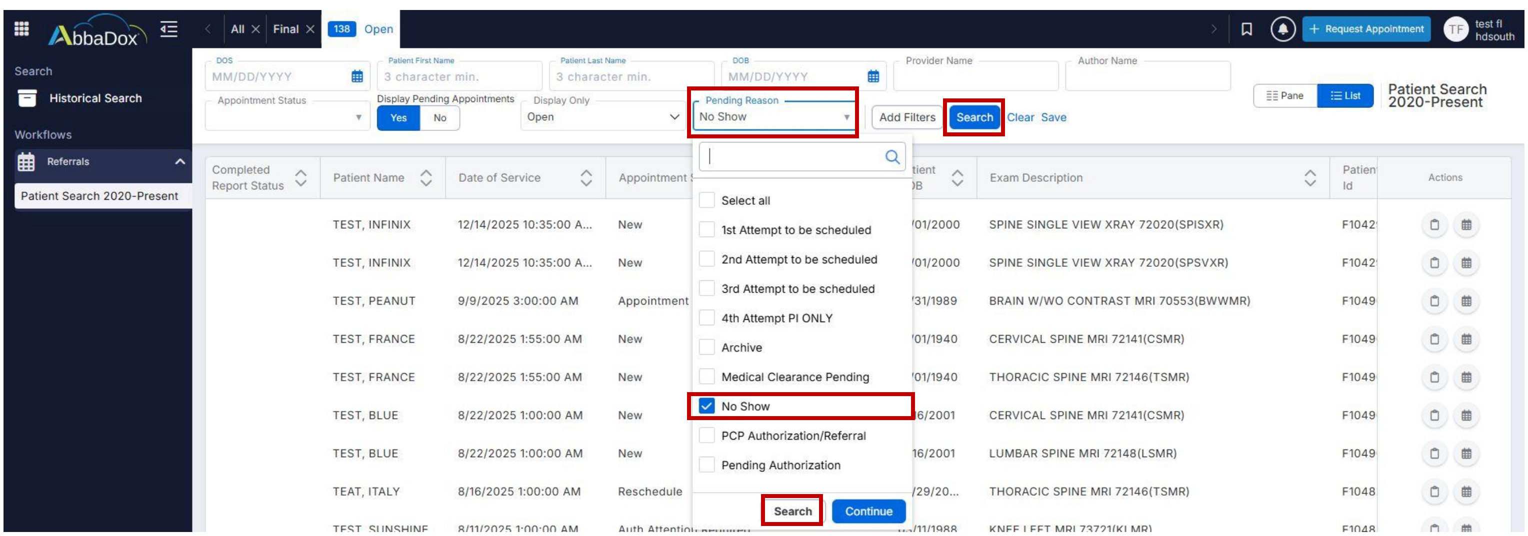


No Shows

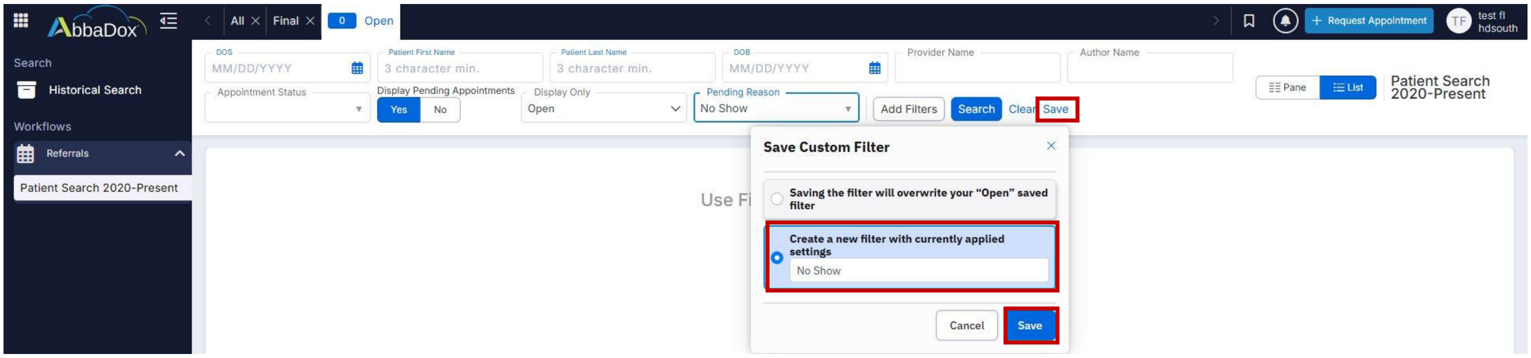
For no shows select “Open” under “Display Only.” Also, check off “Yes,” under “Display Pending Appointments”. The filter of “Pending Reason” needs to be applied by selecting “Add Filtersl,” and click “Apply.”



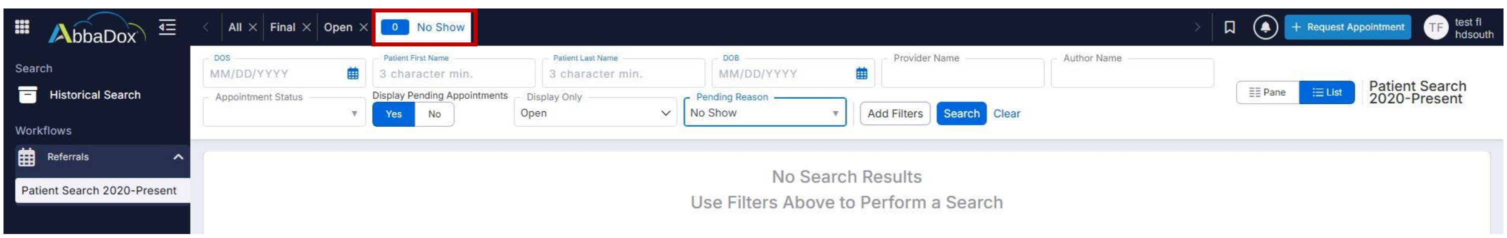
This will display the “Pending Reason” filter. From the dropdown select “No show” and click on “Search.”



This will display all appointments for patients associated with a referring doctor attached to the portal that have no showed to their appointment. When creating a filter from an already customized filter, it will give you the option to update the filter or create a new one. To save the filter click, "save," then check off "Create a new filter with currently applied settings", name the filter and click "Save."

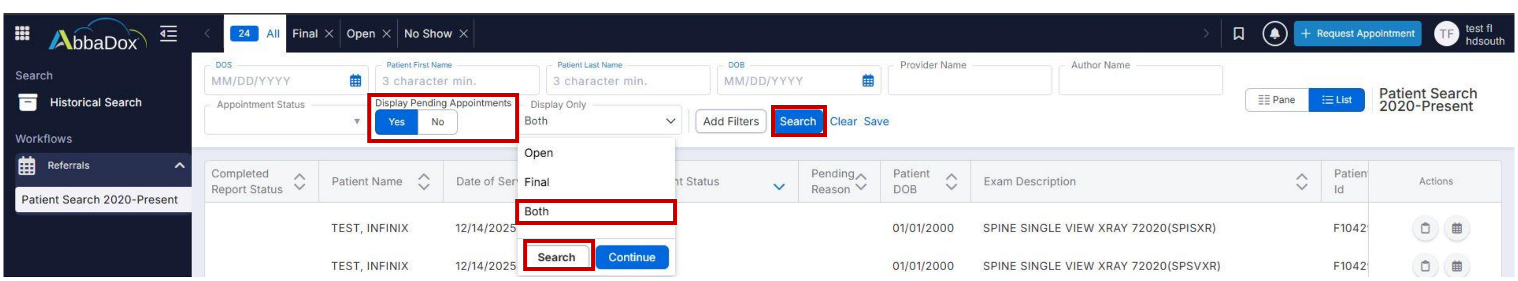


This will create the filter displayed at the top of the screen.

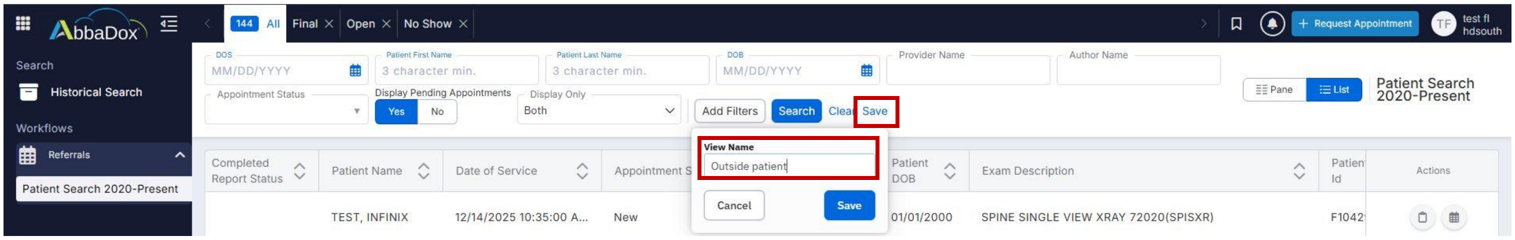


All Patient Search

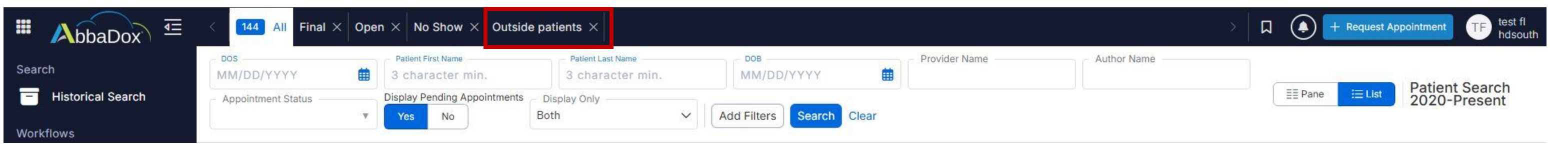
For all patients, select "Both" under "Display Only." Also, check off "Yes" under "Display Pending Appointments," and Click on "Search."



This will display all appointments for patients associated with a referring doctor attached to the portal for both a finalized report for the last 60 days and not yet finalized on the schedule including pending appointments. To save the filter, click “Save,” and name the filter.

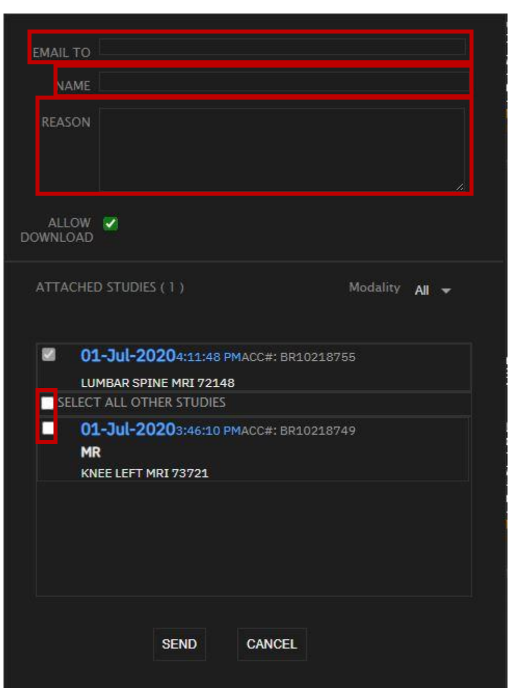


This will create the filter displayed at the top of the screen. In order to search for an outside patient you must enter the full date of birth and the first three of the first and last name.



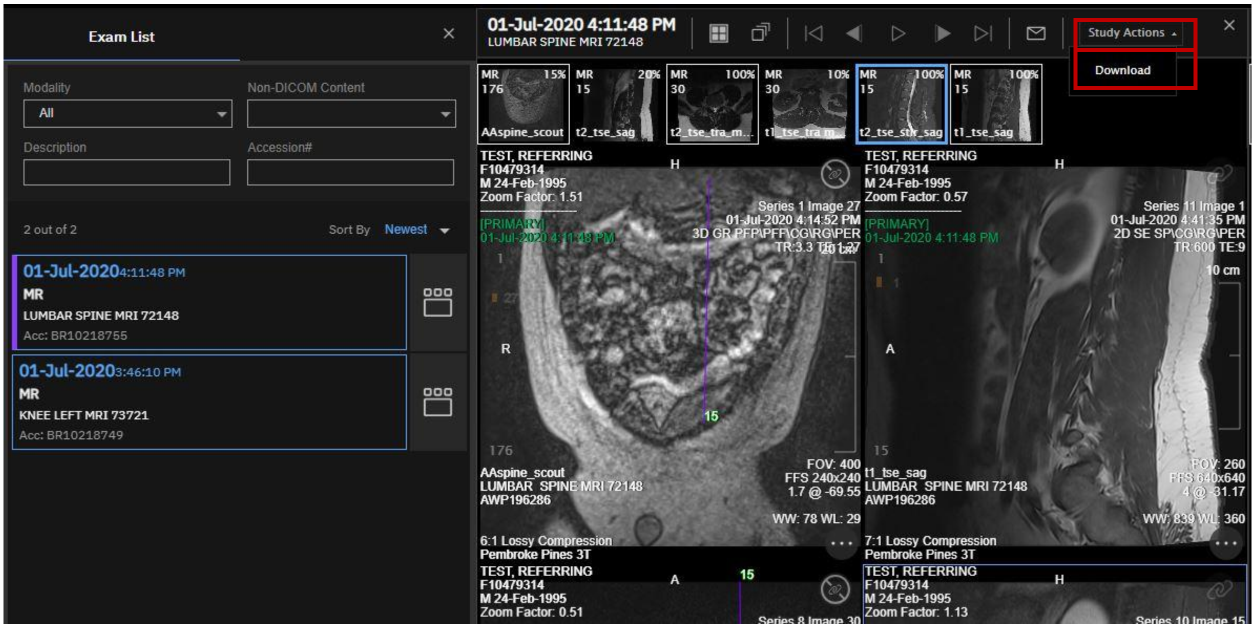
DICOM Image Viewer

Once the DICOM button is pressed, the image viewer will open. The bottom left will show all procedures for the patient. All selected procedures will show the sequences in the main viewer. You can use the tools in the toolbars above the sequences to edit how you view all of the sequences. Click the  icon to send the images via email with a code.

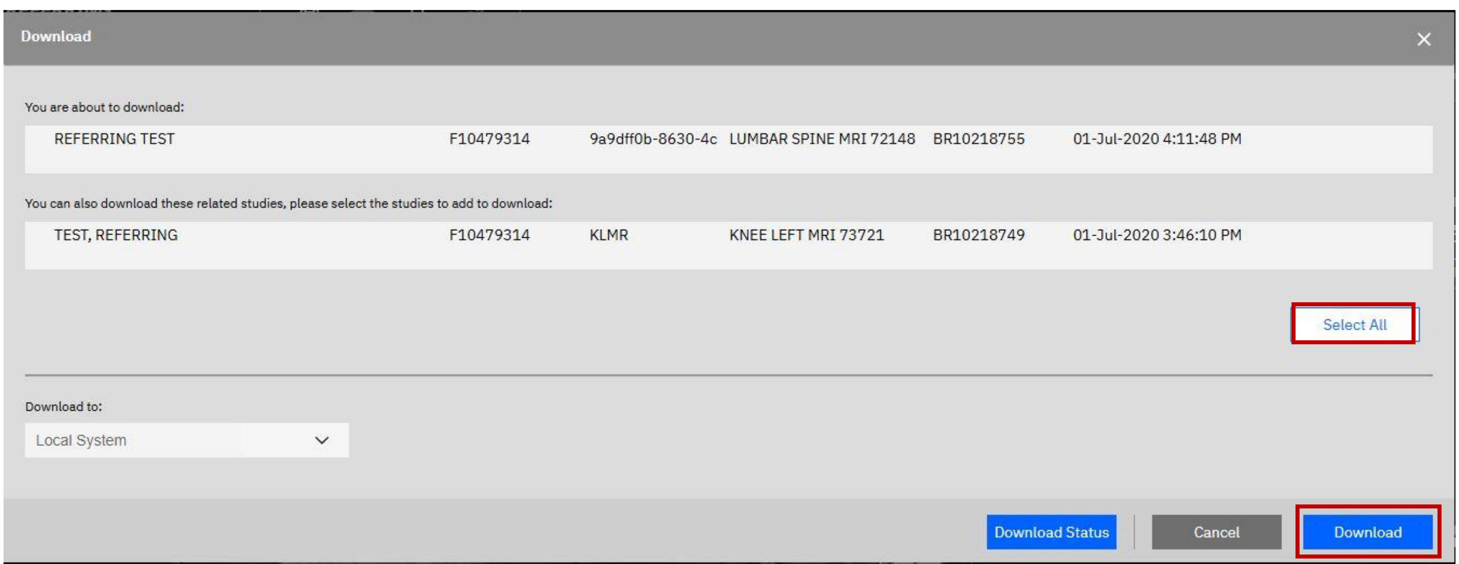


Once clicked, a pop up will appear to email the selected studies. To select an additional study, select the check box or check off “SELECT ALL OTHER STUDIES.” Type in the intended email under “EMAIL TO” (you can only send to one email at a time). Under “NAME” type the patient’s name. Under “REASON” type the procedures being sent. Then click “SEND”. Once sent, a link will be sent to the email and a pop up with the pin code will appear. You must give the one time pin code to the recipient so they can view the images.

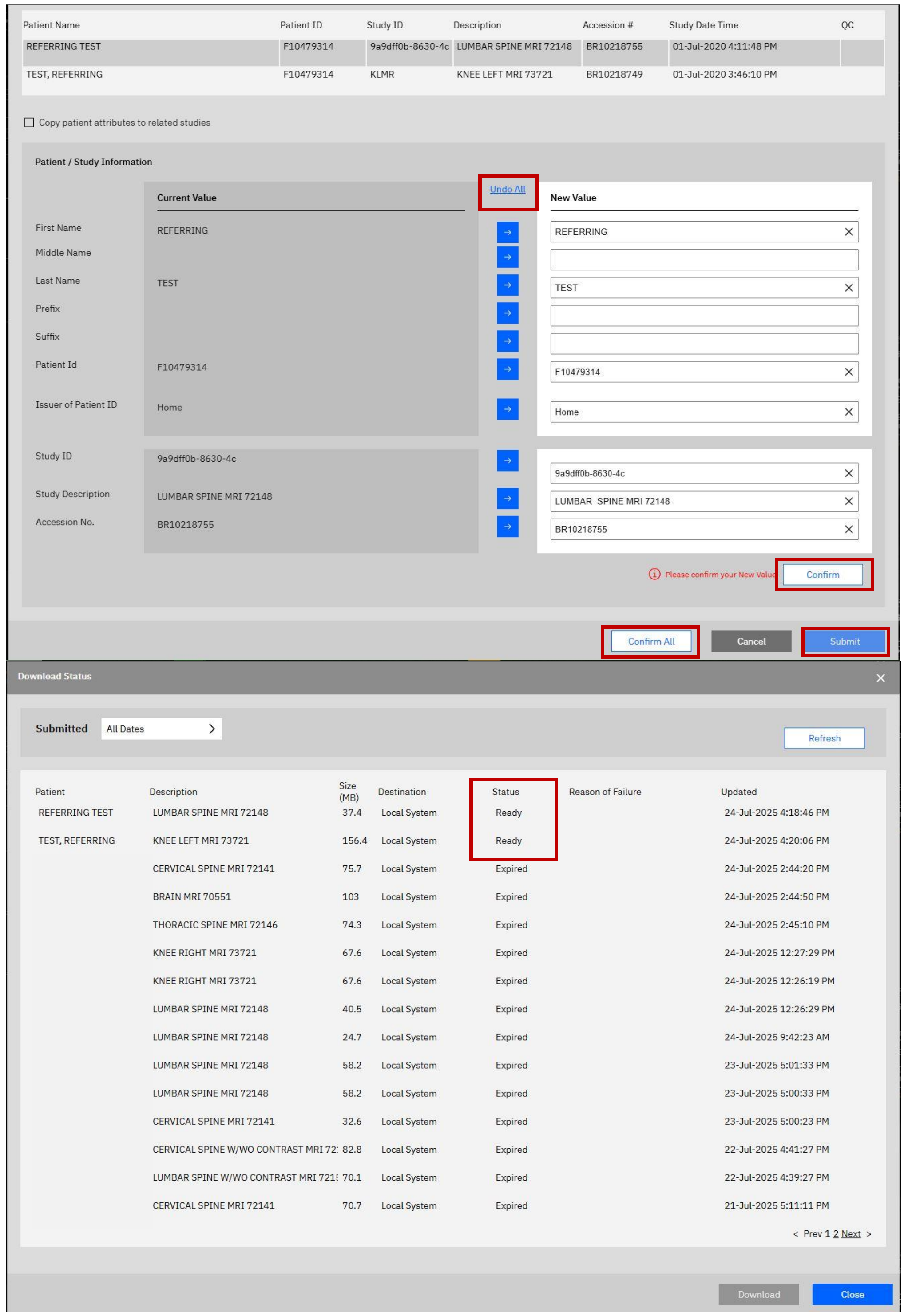
In order to download the images select “Study Actions,” then select “Download.”



In this pop up, select the additional procedures you would like to download and/or click “Select All,” then click “Download.”

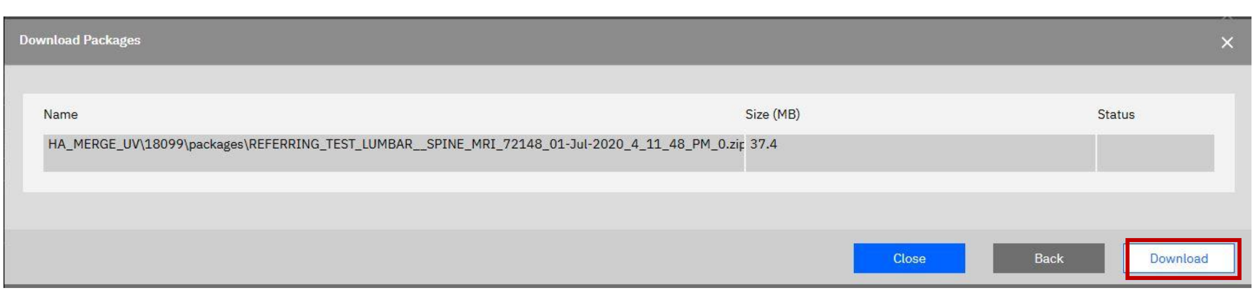


In the next pop up click “Apply All,” fill in any data changes and click “Confirm,” or click “Confirm All” then “Submit.”

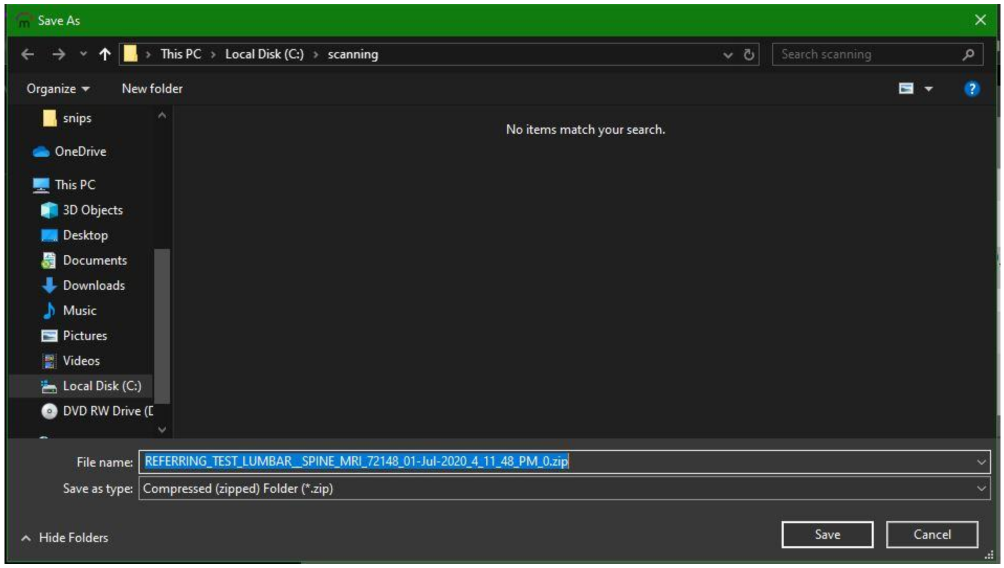


This will trigger a pop up with the statuses of all studies that have been downloaded. Click “Close” once the status says “Ready.”

Then double click the study, and click “Download.”

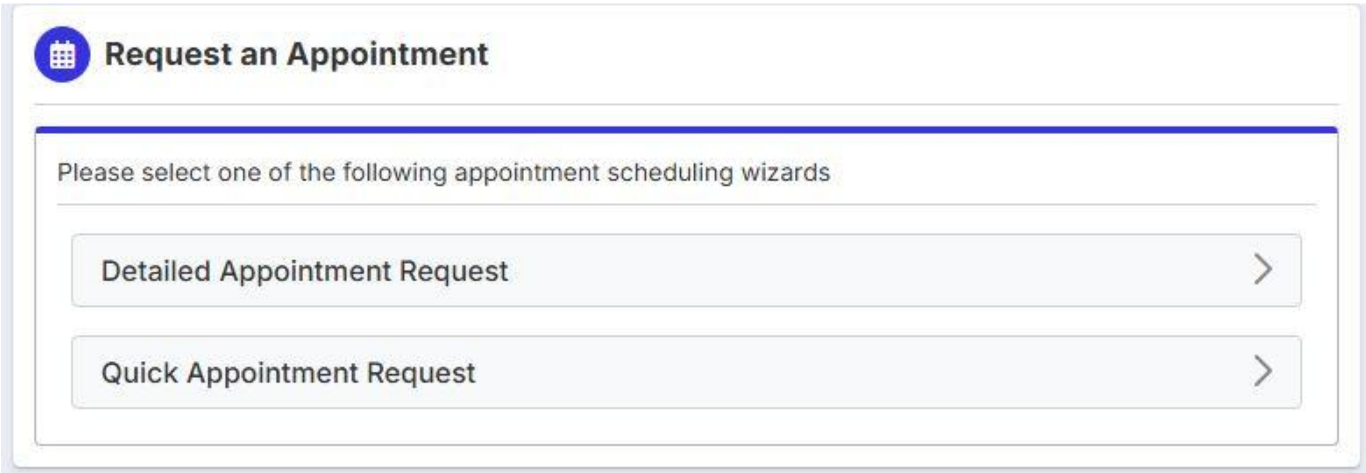


Select the location to save the zip file to your computer, USB, or DISK.



Request appointment

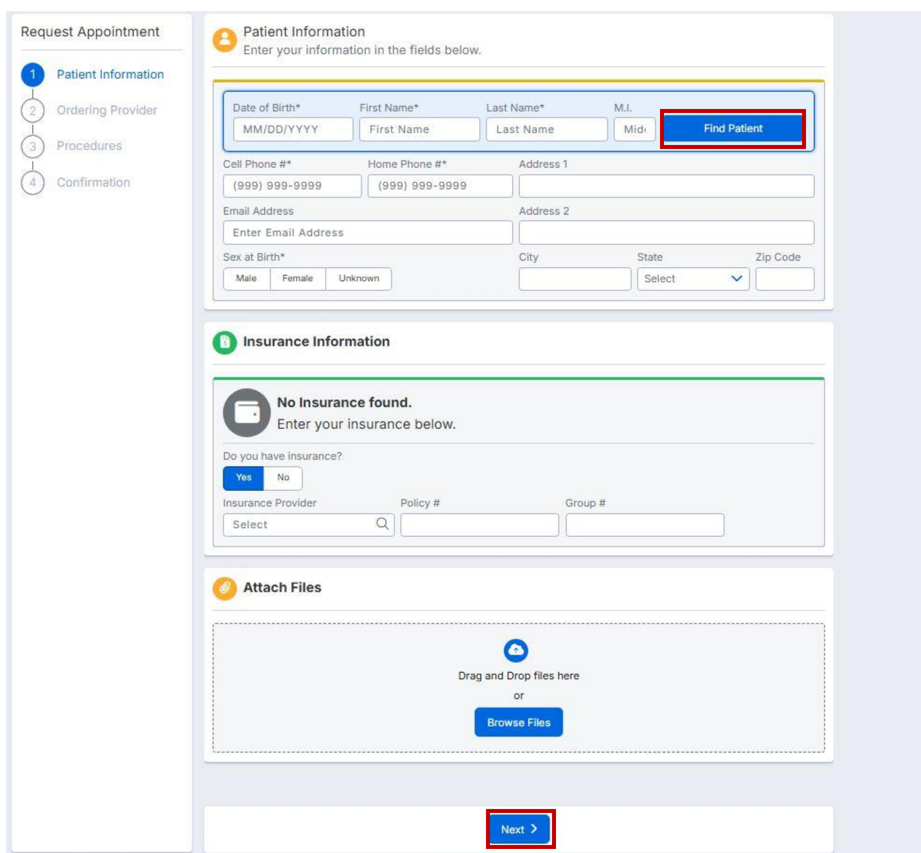
There are two ways to request an appointment "Detailed Appointment Request," and "Quick Appointment Request."



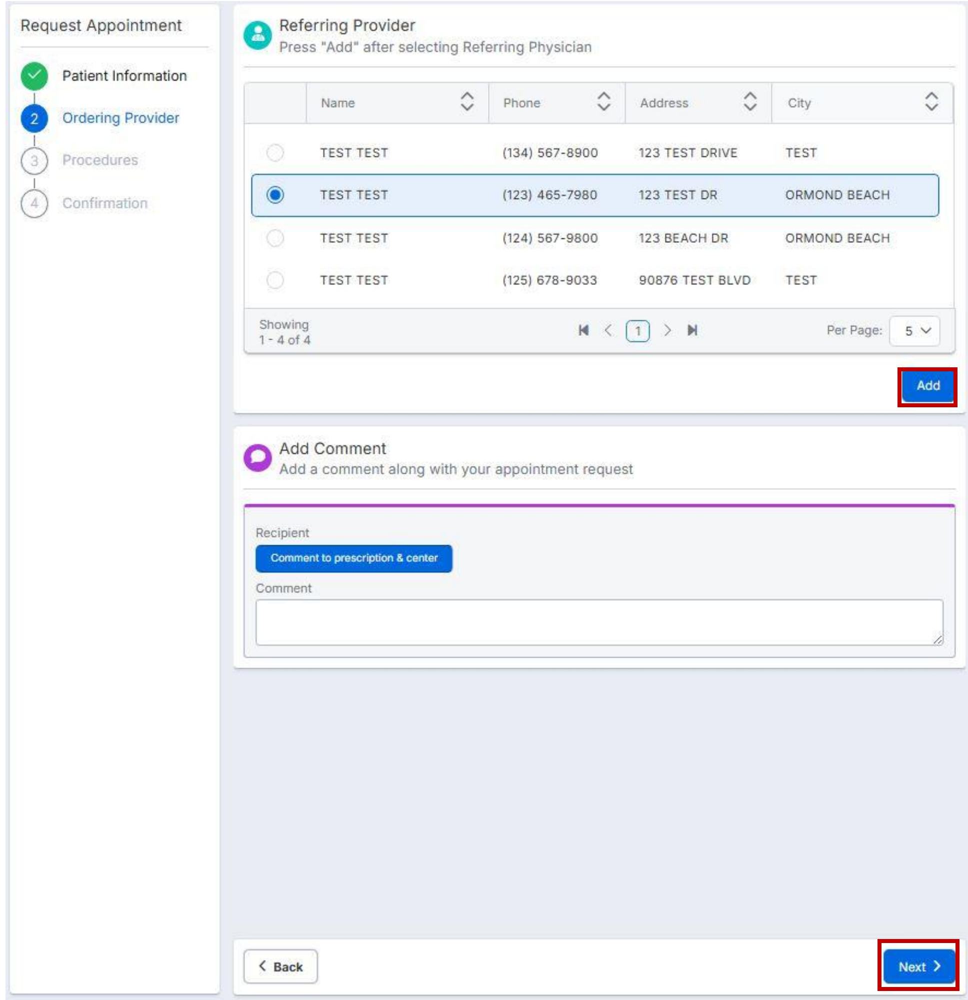
Detailed Appointment Request

The Detailed Appointment Request is a four step process to request an appointment.

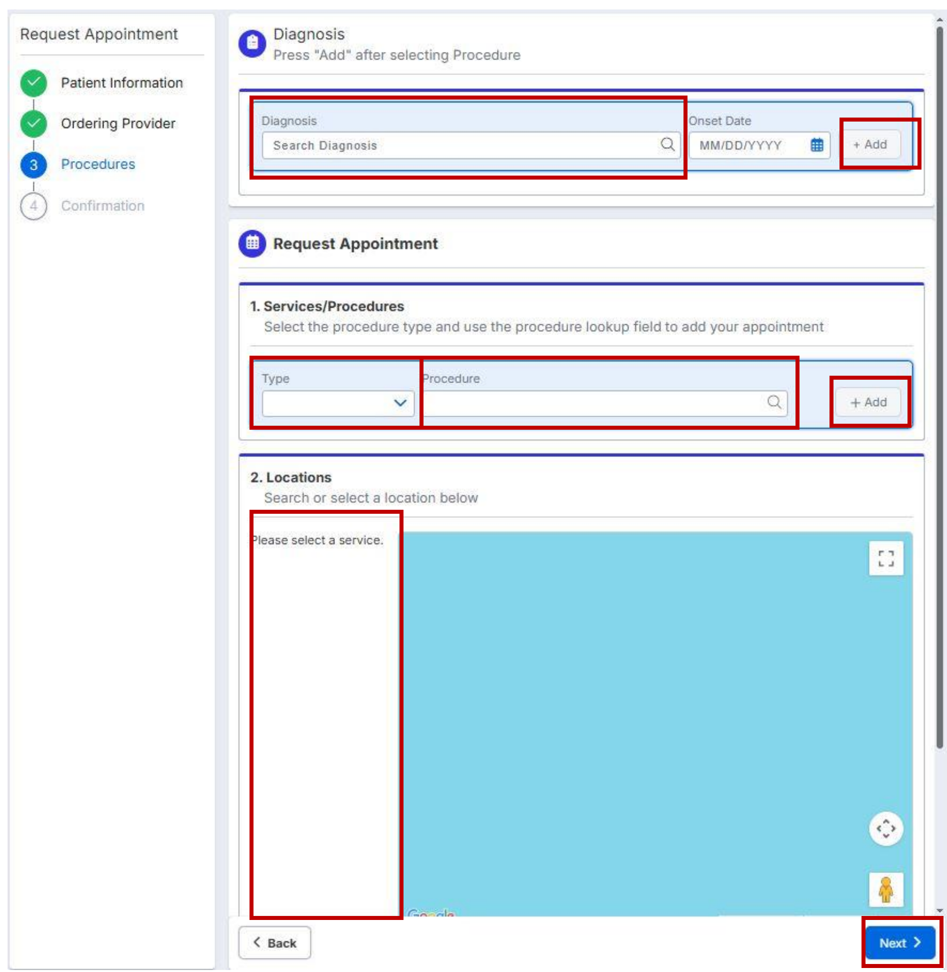
Step one, enter a previous patient's info and hit "Find Patient," or enter a new patient's info. Add the insurance info if applicable and attach any documents that are needed. For example; clinical notes, clearance documents, or an additional RX (a RX is automatically created at the end of the appointment request with an electronic signature). When done, click Next.



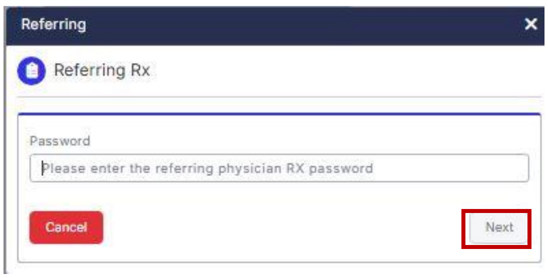
Step two, select the referring physician that is referring the patient and click "Add." Add any comments applicable. Then click "Next."



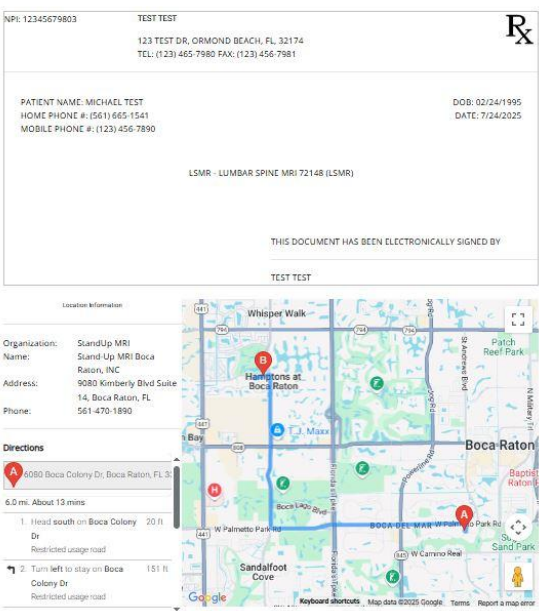
Step three, select the diagnosis if applicable and click "Add." Select the type of scan; MRI or X-ray, then search the procedure(s) and click "Add." Once the procedures are selected, any location that performs the scans listed above will allow you to select a location. Then click "Next."

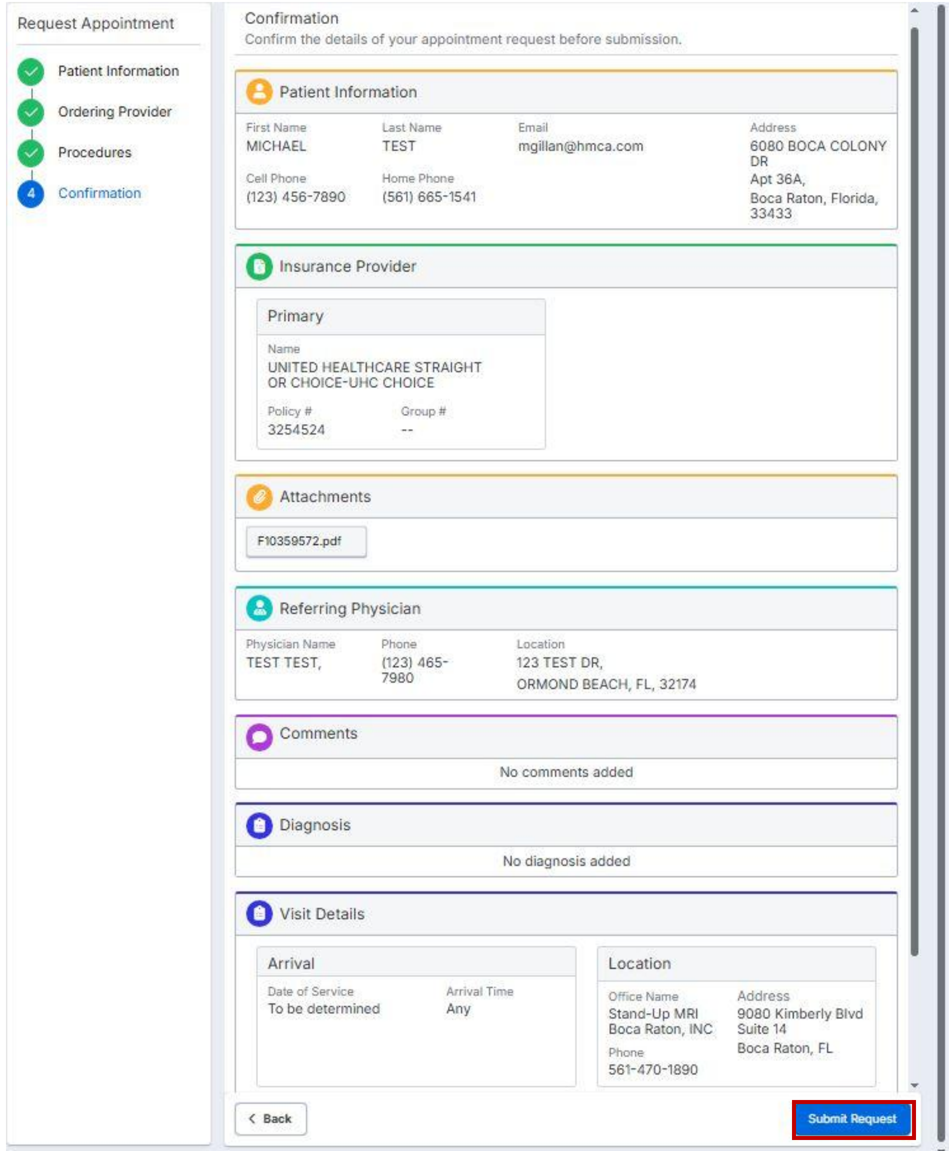


Step four, confirm all the information is correct, and click “Submit Request.” This will trigger a pop up to enter the account’s password and then click “Next.”



Once the password is entered, an RX and a map to the location will generate, and the patient will be added to our pending list to be scheduled.

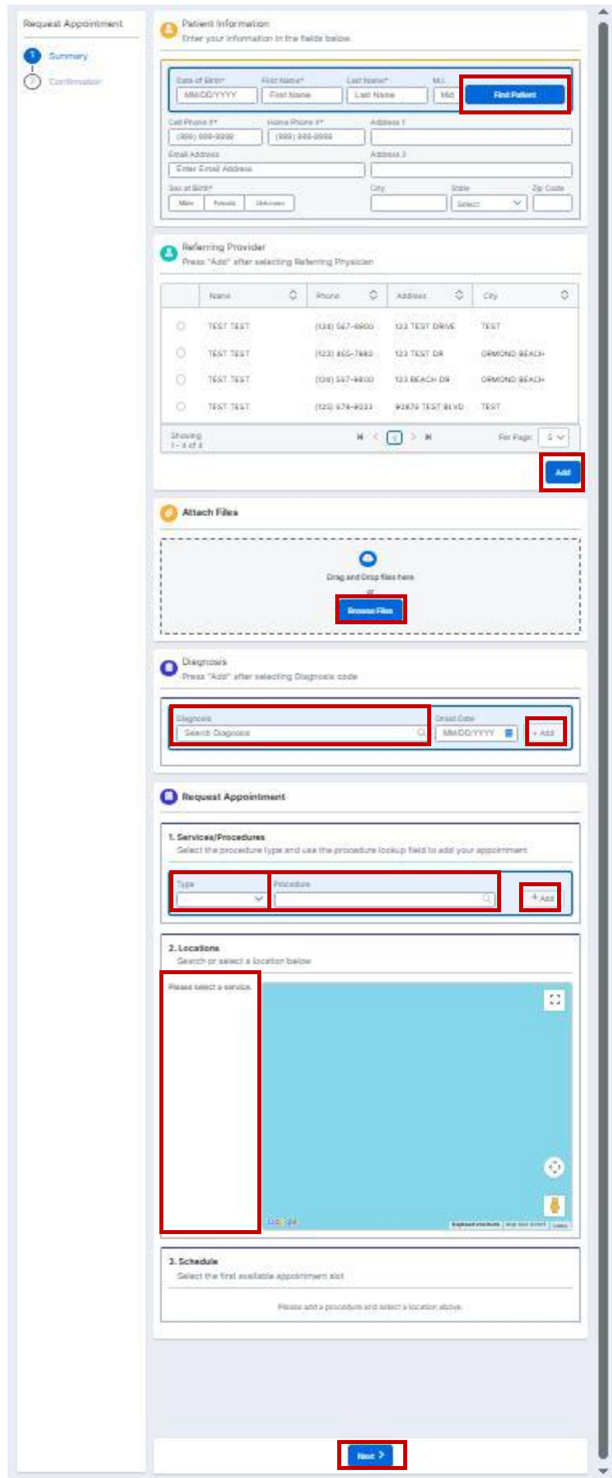




Quick Appointment Request

The Quick Appointment Request is a two step process to request an appointment.

Step one, enter a previous patient's info and hit "Find Patient," or enter a new patient's info. Select the referring physician that is referring the patient and click "Add." Attach any documents that are needed. For example; clinical notes, clearance documents, or an additional RX (a RX is automatically created at the end of the appointment request with an electronic signature). Select the diagnosis if applicable, and click "Add." Select the type of scan; MRI or X-ray then search the procedure(s), and click "Add." Once the procedures are selected, any location that performs the scans listed above will allow you to select a location. Then click "Next."



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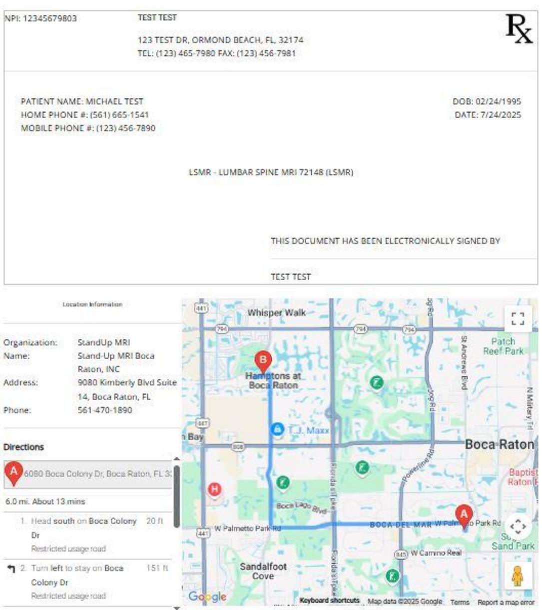
Once the password is entered, a RX and a map to the location will generate and the patient will be added to our pending list to be scheduled.



NPI: 12345679803

TEST TEST

123 TEST DR, ORMOND BEACH, FL, 32174
TEL: (123) 465-7980 FAX: (123) 456-7981

℞

PATIENT NAME: MICHAEL TEST
HOME PHONE #: (561) 665-1541
MOBILE PHONE #: (123) 456-7890

DOB: 02/24/1995
DATE: 7/24/2025

LSMR - LUMBAR SPINE MRI 72148 (LSMR)

THIS DOCUMENT HAS BEEN ELECTRONICALLY SIGNED BY

TEST TEST

Location Information

Organization: StandUp MRI
Name: Stand-Up MRI Boca Raton, INC
Address: 9080 Kimberly Blvd Suite 14, Boca Raton, FL
Phone: 561-470-1890

Directions

6080 Boca Colony Dr, Boca Raton, FL 3

6.0 mi. About 13 mins

1. Head south on Boca Colony Dr 20 ft
Restricted usage road

2. Turn left to stay on Boca Colony Dr 151 ft
Restricted usage road