MEDITECH 6.0

Training Manual
Training Manual Outline

- Shortcuts
- Main Menu
- Scheduling Desktop
- Header / Footer Bars
- Basic Scheduling
- Set Scheduling
- Medical Necessity / Prior Authorization
- Pending Appointments
- ADM “Process Patient Accounts”
- Resource Schedule
- Search for Appointment
Shortcuts

- **F1**: If unsure of the function of a particular button within an application place the cursor over the button and strike F1 which will provide an information screen
- **F11**: Opens up EMR
- **F12**: Saves information entered – may use this in place of choosing Save
- **F9**: Performs any lookup – may use this instead of selecting the down arrow in any look up field
- **Tab**: Takes cursor to the next section – may use this instead of scrolling with mouse
- **Left/Right Arrow**: Moves to the next answer within any section
- **Space Bar**: Selects the desired answer – may use this instead of the mouse to select appropriate answers
- **T**: T= today’s date; T-1= yesterdays date, T-7= one week ago – this can be used in date/calendar questions
- **N**: N= now – this can be used in time questions
- **Alt + F4**: Closes open window
1: Meditech Information Systems On-line Help
2: Links to Micromedex
3: Print page view
4: Lock Session: temporarily minimize the session and lock it
5: Email
Main Menu

- Main Menu is the default screen after logging into Meditech
- This menu allows access to routines and functions to perform job requirements
- Back: goes back one menu
- Home: Goes back to home page
- Recent: The routines accessed during the current Meditech client session
- Frequent: View frequently accessed routines. This menu displays 20 most frequently used routines
Scheduling Desktop

- The **Patient** button provides the ability for the user to schedule, view, and/or edits a Patient’s visit or visits to the hospital.

- The **Department** button provides the ability to view, book, and/or edit appointments for the department selected.

- The **Appt Book** button provides the user the ability to manage the schedule in a format that resembles a paper appointment book. The appointment book allows for the editing of the resource schedules along with the booking/editing of patient appointments. The appointment book provides the user with a visual diagram of what appointments are using what resources during their visit.

- The **Resource** button provides the user with a view of the selected resource’s schedule. This allows the user to view, edit, and perform other functions relevant to the resource itself. It also allows for the user to book a patient appointment for that specific resource.
Scheduling Desktop cont.

- The **Waitlist** button allows the user to process those patient appointments that have been placed in a pending status, or those that have been waitlisted and determined that they would like to come in earlier than their appointment date. This routine allows you to move the appointment from a pended status to a booked status.

- The **Meeting** button allows the user to book a meeting for the department and block off the necessary resources that the meeting will be using. For instance any personnel that are considered a resource would be looked at as being booked, along with the room resource if the resources are built in the scheduling module.
The buttons at the bottom (footer) of the screen will be available based on each user’s access.

1. The **Display** button determines exactly what appointments are displayed to the user. If the user feels that either too many appointments are being shown or they are having a difficult time locating an appointment, pressing this button allows the user to filter the appointments.
2. The **Letters Forms** button allows the user to either send a letter or form to a Printer or Print Queue or delete a letter/form from the Print Queue.

3. The **Switch Acct** button allows the user to switch the account that is being used on an appointment. This is handy for when either the incorrect account has been selected or the patient’s RCR account has been discharged manually and the future appointments require a new account. When this button is pressed a listing of patient appointments will be displayed at which point you can either select one, or press cancel and create a new account.
4. The **Change Status** button allows the user to change the status of an appointment manually. The routine does not allow you to attend the patient as the registration must be updated at that time, but it does allow you to **Cancel**, **No Show**, or place the appointment in a **Pending** status. When you cancel the appointment you will be prompted for a cancelation reason. Be careful when selecting a reason because certain reasons will have an effect on the Patient’s Medical Record. *(example: A reason of **E – Expired** will cause the patient to go into a **DECEASED** status in Medical Records)*
5. The **Duplicate** button allows the appointment to be duplicated which provides for quick entry when needing to book several appointments which use the same resources without creating a series or set. This will fill out all the details of the appointment without needing to enter in the data except for the date and time of the appointment.

6. The **Allergies** button displays the patient’s allergies and could allow the user the ability to enter/edit the allergies.
7. The **Times** button allows the user to enter the times that the patient arrived for the appointment, when they were actually seen, and when they departed. This allows the statistics of the appointment to be tracked on a deeper level.

8. The **E/E Alerts** button allows the scheduler to enter Alerts on a specified appointment.
BASIC SCHEDULING
### MAIN SCHEDULERS DESKTOP

**Scheduler Desktop**

<table>
<thead>
<tr>
<th>Day</th>
<th>Date</th>
<th>Time</th>
<th>Dur</th>
<th>Type</th>
<th>Status</th>
<th>Account</th>
<th>Pt Type</th>
<th>Location</th>
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<tr>
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**Insurance**

<table>
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</tr>
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**Additional Information**

- Facility
- Prior Location
- Inpatient Room/Bed
- Provider

**Resource**

<table>
<thead>
<tr>
<th>Resource Name</th>
<th>Telephone</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Buttons**

- Display
- Letters
- Forms
- Switch
- Acct
- Change
- Status
- Duplicate
- Allergies
- Times
- E/E Alerts
ENTER PATIENT NAME
RE: LAST,FIRST
You will see this screen pop-up after entering patient’s name. Here we enter the pertinent information keeping in mind to enter entire year re: 2000. Once entered click **OK** or press **F12**.
Patient Selection
When entering information and it is different than what is entered in HIM (lower case vs. upper case letters) this screen will prompt to show the discrepancy in format between what you have entered and what is in HIM. Select **Copy HIM**. Upon copying, please ensure that the patient information traveling over to your scheduling mode, matches your patient accordingly.
Now on to scheduling!

1. Select **Book**, to start the scheduling process.

2. Once you select Book you will then be prompted to select **New Visit** or **Look for Visit**. When scheduling a patient we will select **New Visit**.
Enter the department you are scheduling for, then press F9, or Enter
### CAT Scan Appointment Types

<table>
<thead>
<tr>
<th>Alias</th>
<th>Mnemonic</th>
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<th>Facility</th>
<th>Name</th>
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</table>
Four main headings that will need to be completed prior to every booking:

- Appointment
- Instructions
- Scheduling Additional Info
- SCH Patient Data for SEM

Scheduler Desktop - CCR/CCR.TEST6.OSN/CCR.TEST6.OSN - Heather E Lavoie

Shortcake, Strawberry GS
11/F 02/13/2000

Facility: SEM
Account Num: NEW
Med Rec Num:

* Appointment [Instructions] * Scheduling Additional Info * SCH Patient Data for SEM

* Appt Type: CTLS
  CT Lumbar Spine

* Visit Reason

Patient Data

- Birthdate: 02/13/2000
- *Age/Gen: 11/F
- *SOC Sec Num: 533-31-1118
- *PCP: Oakley, Bernard E, MD

Address/Employer Data

- *Address: 44 UNIT ST NEWTON MA 02298
- *Home Phone: 555231111
- Call Back: 1
- Employer: MINOR
- Work Phone:

Insurance Policy Number
- BCELECT 533311118

Resource Group [Name]
- CT: COMPUTED TOMOGRAPHY
  Start: 0
  Dur: 15
  Use Resource: INCLUDE

Scheduler Notes

* Date
* Time
* Provider Priority

Book On
- 00, 15, 30, 45

Use Inp Loc
- Location: D1.CTEM
- RSIL Group:

Notes

Next Appts
- Critical Care Indicators
- E/E Alerts

First Available
Search
Manual Search
Pending?
Pending? No
Notes
Next Appts
Critical Care Indicators
E/E Alerts
Cancel
Next
Save

[Other software interface elements and icons]
**Shortcake, StrawberryGS**

11/F 02/13/2000

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<th>Instructions</th>
<th>*SCHEDULING ADDITIONAL INFO</th>
<th>*SCH PATIENT DATA FOR SEM</th>
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<td>CT LUMBAR SPINE</td>
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**Patient Data**

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<td>*Diagnosis</td>
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**Address/Employer Data**

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**Auth/Referrals**

| Insurance Policy Number | BCELECT 533311119 |

**Resource Group**

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**Scheduler Notes**

- *Date*
- *Time*
- *Provider*
- *Priority*
- **Book On**: 00, 15, 30, 45
- **Duration**: 15
- **Use Loc**
- **Location**
  - **DI.CTEM**
# Patient Data

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<th>Value</th>
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<tr>
<td>Age</td>
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<tr>
<td>Sex</td>
<td>F</td>
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</tr>
<tr>
<td>Mar Status</td>
<td>S</td>
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<tr>
<td>Race</td>
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## Visit Diagnosis

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<td>2</td>
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<td>3</td>
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</tr>
<tr>
<td>4</td>
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### Address

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<tr>
<td>State</td>
<td>Zip</td>
</tr>
<tr>
<td>Home Phone</td>
<td></td>
</tr>
<tr>
<td>Other Phone</td>
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</tr>
<tr>
<td>Cell Back Phone</td>
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<tr>
<td>Email</td>
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### Alternate Address

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<tr>
<td>Home Phone</td>
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<tr>
<td>Other Phone</td>
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### Employer

<table>
<thead>
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<td>Emp Status</td>
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Insurance Information

Policy Num: 533311118
Subscriber: Shortcake, StrawberryGS
Sub Address: 44 UNIT ST
City: NEWTON
State Zip: MA 02250
US Citizen: F
Phone: 553311111
Birthdate: 02/13/2000
Sex Race: WH
Soc Sec Num: 533-31-1118
Mar Status: S
Sub P1 Num: 5333111118
Rel to Pt: SP
*Fin Class: BC-MC

Ins Name: Blue Care Elect
Ins Address: P.O. Box 986015
City: Boston
State Zip: MA 02296
Phone: Eff Exp Date: 
Elec Check: 
Cov Num: 
Group Name: MINOR
Group Num: 
Emp Status: UE
Emp Name: MIN
Emp Location: 
Deduct Copay: 
Benefit Plan: 

* Mnemonic: BCELECT
Blue Care Elect
Selecting Appointment date / time / provider
Searching for an appointment date/time
Searching for an appointment date/time

<table>
<thead>
<tr>
<th>Search for Appointment Date and Time - SEM (CCR/CCR.TEST6.05N/CCR.TEST6.05N) - Heather F. Lavoie</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Shortcake, StrawberryGS</strong></td>
</tr>
<tr>
<td><strong>11/F 02/13/2000</strong></td>
</tr>
<tr>
<td><strong>Facility:</strong> SEM</td>
</tr>
<tr>
<td><strong>Acct Num:</strong> NEW</td>
</tr>
<tr>
<td><strong>Med Rec Num:</strong></td>
</tr>
<tr>
<td><strong>Earliest Date:</strong> 04/11/11</td>
</tr>
<tr>
<td><strong>Latest Date:</strong> 08/11/11</td>
</tr>
<tr>
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<tr>
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- Click **Find Times** button next to **Previous** and **Next**.
### Searching for an appointment date/time

#### Shortcake, StrawberryGS
11/F 02/13/2000

**Facility:** SEM  
**Acct Num:** NEW

#### Search for Appointment Date and Time

- **Earliest Date:** 04/11/11
- **Latest Date:** 05/11/11

#### Exclusions:
- Monday
- Tuesday
- Wednesday
- Thursday
- Friday
- Saturday
- Sunday

---

#### Page 1

<table>
<thead>
<tr>
<th>Day</th>
<th>Date</th>
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<th>Dur</th>
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<td>CT ROOM 1</td>
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</table>
### Searching for an appointment date/time

**Shortcake, StrawberryGS**

11/F 02/13/2000

**Facility:** SEM  
**Account Num:** NEW  
**Med Rec Num:**

#### Search Criteria

- **Earliest Date:** 04/11/11  
- **Latest Date:** 05/11/11

#### Exclusion

- **Exclude:**  
  - Monday  
  - Tuesday  
  - Wednesday  
  - Thursday  
  - Friday  
  - Saturday  
  - Sunday

#### Schedule

**Page 1**

<table>
<thead>
<tr>
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<td>OAKLEY, BERNARD E MD</td>
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</table>

**Book On:** 00, 15, 30, 45

---

[Click on the image to open the full page view of the appointment search interface.]

---

[Select the appropriate appointment date and time based on the schedule displayed.]
Searching for an appointment date/time

Scheduler Desktop: CCR/CCR.TEST6.05/CCR.TEST6.05N

Facility: SEM
Acct Num: NEW
Med Rec Num:

*Appt Type  CTLS
Visit Reason  LOW BACK PAIN

CT LUMBAR SPINE

Birthday  02/13/2000
Age  11/F
Sex  M
Social Sec Num  533-31-1118
PCP  OAKLEY, BERNARD E MD

Diagnosis

Resource Group  CT
Name  COMPUTED TOMOGRAPHY
Start  0
Duration  15
Use Resource  CRTRM1
I/E/G/L  INCLUDE

Scheduler Notes

*Date  04/12/11
Time  0900
Provider Priority

Book On  00.15.30.45
Duration  15
Pt Type  REF

Use Inp Loc  12:CTEM
Location

Search for Appt
Search for Alias
<table>
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<tr>
<th>Mnemonic</th>
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<th>Type</th>
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<tr>
<td>KADHE</td>
<td>Kadet, Hessa MD</td>
<td>ST.ACTIVE</td>
<td>MED</td>
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**Address**: 11 NEVINS ST, STE 505

**City | State | Zip**
--- | --- | ---
BRIGHTON | MA | 02135

**Telephone | Fax**
--- | ---
6177829210 | 6177828565

**Adm Priv | On Staff | Group**
--- | --- | ---
Y | Y | SEMPCPG01

**Specialty | NPI Number | Pager Number**
--- | --- | ---
MEDI | 1376500400 |
Manual selection of appointment date/time
Scheduler Instructions

SCHEDULER INSTRUCTIONS FOR: CTLS - CT LUMBAR SPINE
***WITH CONTRAST - PATIENTS OVER 50 REQUIRE BUN/CREATININE WITHIN 30 DAYS
***DOCTOR'S OFFICE MUST PROVIDE LEVELS OF SPINE THEY WANT SCANNED***
***DO NOT BOOK:
   CONTRAST STUDIES BEFORE 10:00AM ON SAT

Patient Instructions

PATIENT INSTRUCTIONS FOR: CTLS - CT LUMBAR SPINE
***BLOOD WORK IS REQUIRED***
***IF IV CONTRAST IS USED, PT MUST BE NPO 2 HOURS PRIOR TO START OF SCAN***
Scheduling Additional Info

Queries conditionally required by appointment type:

- *With or without contrast?*  
  - W/WOC

- Age: 11

- CT Prep:

- BUN/CPE in past 30 days:

- Arrival time:

2 of 5  Goto 3
Patient’s who require labs

- *With or without contrast?*  W/WOC
- *CT Prep?*  55
- *BUN/CRE in past 30 days?*  
- *Arrival time:*
*Does pt have Diabetes?
On Metformin or Insulin?
If yes, remind Office re meds/labs post exam
Post exam instructions given?

FLHYS to be done by Radiologist or Ordering MD?
If R&D, book Tue/Thu only

Is the patient pregnant?
Is the diagnosis Nuchal Translucency?
Does pt have Diabetes?
On Metformin or Glucophage?
If YES, REMIND OFFICE RE MEDS/LABS POST EXAM
Post exam instructions given?
FLXYS to be done by Radiologist or Ordering MD?
Is the patient pregnant?
Is the diagnosis Nuchal Lucency?
### Sch Patient Data for SEM cont.

**Shortcake, Strawberry GS**

- **Facility:** SEM
- **Appointment:** \( \text{CT LUMBAR SPINE} \)
- **Date:** 06/22/11
- **Time:** 11:00
- **Provider:** KADEH

**Patient Data**

- **Birthdate:** 02/13/2000
- **Address:** 44 Unit St, Newton, MA 02216
- **PCR:** OAKLEY, BERNARD E, MD
- **Insurance Policy Number:** 553211138

**Resource Group**

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<tr>
<th>Name</th>
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<td>EXCLUDE</td>
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**SCH PATIENT DATA FOR SEM**

- **Referring Physician:** KADEH, KADEH, MD

---
Sch Patient Data for SEM cont.
Sch Patient Data for SEM cont.
Meditech 6.0

SET SCHEDULING
**SET SCHEDULING**

![Scheduling Software Interface](image)

The image shows a screenshot of a scheduling software application. The interface includes fields for Patient, Day, Date, Time, Dur, Type, Status, Account, Pt Type, Location, Insurance, Policy Number, Additional Information, Resource, Resource Name, and Telephone. The interface also includes buttons for various actions such as Display, Letters, Switch Acct, Change Status, Duplicate, View Alerts, and options for Patient, Department, Appt Book, Resource, Part List, Book, Edit, View, Pending, and Search for Appt, Search for Alias.
Set Scheduling - BOOK

Scheduler Desktop - (CCR/CCR.TST6.05N/CCR.TST6.05N) - Heather F Lavoie

Shortcake, Strawberry GS
11/F 02/13/2000

* Appt Type: Mix

Patient Data
- Birthdate: 02/13/2000
- Age/Sex: 11/F
- Soc Sec Num: 533-31-1118
- PCP: Oakley, Bernard E MD

Address/Employer Data
- Address: 44 UNIT ST NEWTON MA 02258
- Home Phone: 552291111
- Call Back: 552291111
- Employer: MINOR
- Work Phone:

Insurance Policy Number
- BCELECT 5335111110

Resource Group
- Name

Start Dur Use Resource I/E/G/L

Scheduler Notes

* Date
* Time
Provider Priority
Book On
* Duration
* Pt Typo

Use Exp Loc
Location
* Proc Group

Appts Critical Care
Indicators  View Alerts
Cancel  Save
### Set Scheduling - BOOK

#### Appointment Type Lookup

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<thead>
<tr>
<th>Alias</th>
<th>Mnemonic</th>
<th>Dur</th>
<th>Facility</th>
<th>Name</th>
<th>Appt Sets</th>
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<td>MRABDOMEN</td>
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<td>30</td>
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<td>SEM</td>
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Instead of appt type MRARTHSHLD, one of these appt sets is Required.

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*Enter Appointment Set*  ARTHRO.SHD
Set Scheduling - BOOK
### Set Scheduling - BOOK

#### Page 1

**Current Search Date**: TUE 04/19/11

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<th>1100</th>
<th>1200</th>
<th>1300</th>
<th>1330</th>
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**Day** | **Date** | **Time** | **Appt Type** | **Duration** |
--------|----------|----------|---------------|--------------|
TUE     | 04/19/11 | 0900     | SPARSET       | 30           |
TUE     | 04/19/11 | 0930     | MRARTHSLHD    | 30           |
### Set Scheduling - BOOK

**Shortcake, StrawberryGS**  
11/F 02/13/2000

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<tr>
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**Facility:** SEM  
**Acct Num:** NEW  
**Med Rec Num:**

---

**Scheduler Desktop**  
(CCN/CCN.TEST6.05N/CCN.TEST6.05N)  
Heather E Lavoie

**Patient**  
**Book**  
**Search for Appt**  
**Search for Alias**
## Set Scheduling - BOOK

### Shortcake, Strawberry GS

- **Facility:** SEM
- **Acct Num:** NEW
- **Mod Rec Num:**

#### Appointment Set

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<td>0930</td>
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**Appointment type CDS**

- **Patient Status:** OUT, OUTPATIENT
- **Right, Left or Bilateral:**

**Is pt on Coumadin or other blood thinner?**

- **N**
  - IF YES, REFER MD OFFICE RE MEDS

**Age:**

- 11

**BUN/CRE in past 30 days:**

**Arrival time:**

---

**Search for Appt**

---

**Resource**

---

**Registration**

---

**View**

---

**Set**

---

**Pending**

---
Set Scheduling - BOOK

- *Pt from Nursing/Group Home: N
- * Fax questionnaire to NH for CT/MRI

- Patient have Legal Guardian:
- Name of Legal Guardian:
- Relationship:
- Phone:
MEDITECH 6.0

Medical Necessity / Prior Authorization
Medical Necessity / Prior Authorization

Patient Order Medical Necessity Compliance Calculator:

- Standard Data
- ICD9 Search
- Display Results

- Patient: FRUITY,TUTI
- User: SEM-HELO1
- *Fin Class: BC-MC
- *Pt Status: REF
- *Facility: SEM
- *Provider: KADHE
- *Location: DI,MRIEM
- *Service Date: 04/19/11
- *Sex: F
- *Birthdate: 05/05/1955
- *Age: 55
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<tr>
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Keyword: HEADACHE
## Medical Necessity / Prior Authorization

### Patient Order Medical Necessity Compliance Calculator

**Patient:** 05/05/1955  
**Fin Class:** BC-MC  
**Provider:** Kadet, Hessa MD  
**Service Date:** 04/19/11

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<table>
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<tbody>
<tr>
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**ABN Status:** PENDING  
**ABN Status Date:** 04/19/11  
**ABN Comment:**
Pending Appointments

Scheduler Desktop - (CCR/CCR.TEST6.05N/CCR.TEST6.05N) - Heather E Lavoie

Fruity, Tuti
55/F 05/05/1955
(617) 244-7986
125-69-7874

Patient

Allergy/Adverse Reaction:

- Day
- Date
- Time
- Duration
- Type
- Status
- Account
- Pt Type
- Location

- Insurance
- Policy Number

- Facility
- Prior Location
- Inpatient Room/Bed
- Provider

- Resource
- Resource Name
- Telephone

Display
Letters
Forms
Switch
Acct
Change
Status
Duplicate
View
Alerts
Pending Appointments
# Pending Appointments

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**Insurance**
- BCHOBLUE
- HSNSEC

**Policy Number**
- MTN92543210
- 125675784

**Additional Information**
- Facility: SEM
- Prior Location: Inpatient Room/Bed
- Provider: Kadot, Hassa MD
MEDITECH 6.0

ADM “Process Patient Accounts”
ADM “Process Patient Accounts”
ADM “Process Patient Accounts”
ADM “Process Patient Accounts”

**Fruity, Tuti**
- **55/F** 05/05/1955
- **(617)254-7696**
- **125-57-9704**
- **Med Rec Num:** EM00000710

**Allergy/AdvReac:**

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**Insurance**  
- BCHMOBLUE  
- HENSEC

**Policy Number**  
- MTN9875643210  
- 125679734

**Additional Information**
- **Facility:** SEM
- **Prior Location:**
- **Inpatient Room/Bed Provider:** Kadet, Hessa MD

**Resource** | **Resource Name** | **Telephone**
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- CTPM1 | **CT ROOM 1** | *
Resource Schedule

April 2011

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Resource Lookup

Search: MR

Mnemonic | Name
---------|------
MRM1     | MRI ROOM 1
MRM2     | MRI ROOM 2
Search for Appointment
Search for Appointment
Search for Appointment