Healthinc OCCAM RIS
Quick Reference Guide

Booklet 2- Administration

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1. OCCAM RIS Administration

1.1. OCCAM RIS Keyboard Fundamentals

1.1.1. Tab Key versus Enter Key

After entering information in OCCAM RIS data fields, it is preferable to use the **Enter** key rather than the Tab key to navigate to the next field. This will ensure the information is committed, validated, and populated with correct details.

1.1.2. Uppercase versus Lowercase

OCCAM RIS data fields are case sensitive, which means information must be entered in the either uppercase or lowercase. OCCAM is generally set up in all uppercase.

1.1.3. Help

In most screens, context sensitive information will appear on screen when the cursor is hovering in a data box. The information relates specifically to the field in which the cursor is located. In most cases, pressing **F1** to display further help and **F1** again to display the online manual.

1.1.4. Date Entry

Date entries can be typed in full in the dd/MM/yyyy format however there exists many shortcuts to streamline the entry of date fields.

- You can omit the slash characters such as 01011960 to for 01/01/1960
- Enter T and press Enter for today's date.
- Enter just the DAY numbers of the current date and press enter and OCCAM will default to that day in the current month and year.
- You can also enter +1, +2 or -1, -2 to go forward or backwards from the current day.

1.1.5. F2 Key: Save

It is important at the end of data entry on any screen to press or click the F2 key rather than clicking the X at the top right of the screen. Any data entered will be lost if not saved with F2 first.

1.1.6. F3 Key: Search

In many data fields there is the option to search for the correct value. Pressing F3 key will give you further search options, this helps if you do not know the code of a scan, initials of your staff and or the other modalities.

1.1.7. Data Grid Add/Remove

There are numerous data fields throughout OCCAM RIS which are presented in Data Grids. Grids in which there are frequent alterations will have + and – buttons to enable you to easily Insert or Delete rows from the grid. For rows where these controls do not exist you can use the **CTRL+Insert** and **CTRL+Delete** keys on your keyboard to insert and delete rows respectively.

Notes

1.2. How To Launch OCCAM RIS workstation

1. Double click on the **OCCAM Screen** icon on your workstation Desktop

2. Next you will be prompted to login. Enter your initials and password and press the **Connect** button

Note: The initials and password fields are both case sensitive. Also note that you can use your Enter Key the navigate through the fields

Your password has been initially set to **XXXX** (case sensitive)

When logging in for the first time or if you have your password reset you will be required to enter your password in as above (four upper case 'x' characters)

You will then be prompted to assign your own password. As with any password you should keep this password secret.

Notes

1.3. OCCAM RIS Toolbar

From left to right the icons on the OCCAM RIS Toolbar are as follows

1. **Appointments** Make or view appointments.
2. **Arrivals** - here is where you will arrive your patients, see who is next or who is running late.
3. **Radiographer Worklist**- Tech's Sonographers can see if their patient has arrived, view their medical history, reports and referrals an can scan worksheets and documents into their file. You will also itemise and complete the scan from the worklist.
4. **Enter Item Numbers** – Entering billing item numbers to consultation.
5. **Type/Amend Report**- (Typists)
6. **Billing**- to bill a patient consult- can also be done from the Traffic lights
7. **Receipting**
8. **Payor Notes**
9. **Patient Status (Traffic lights)** will show you your patient status, how they were processed, check the report status, send consult offsite for typing, scan documents, view medical history, view referrals, print reports and bill all from this screen.
10. **Consultation Enquiry**- here you will be able see all information about this consult, you can make a payment, resend the download, view reports, open their file or their doctors file and much more.
11. **Patient Registration**- here is where you would register a patient if they are **not** booked in for an appointment e.g. Walk in Examination
12. **Referrer Enquiry**- you can look up doctors in your system from this icon.
13. **Scan**- to scan documents into patients consult
14. **Claim Status**- what has or hasn't been paid from Medicare
15. **Message Status**
16. **Print Labels**
17. **Estimated Cost**-provide an estimation of the costs for an exam to a patient (informed financial consent)

Notes

1.4. Traffic Lights – Patient Status Screen

1. Click on the **Patient status** icon on the OCCAM RIS Toolbar

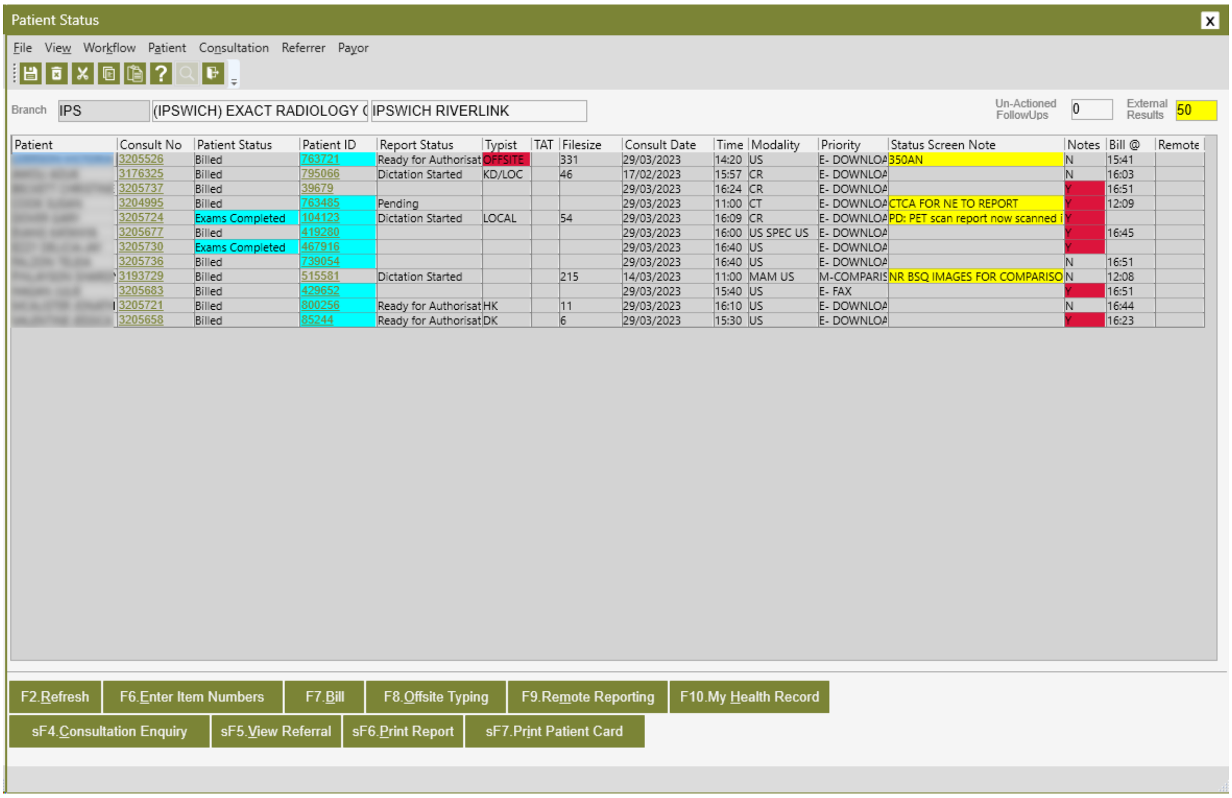
2. This will bring you to the Patient Status screen – often referred to as the **Traffic Lights**.

   This screen is a convenient launch pad for many workflows within OCCAM RIS as it displays a list of active consultations within OCCAM RIS. A consultation is considered active if it is either not yet billed and/or not yet had the associated report Authorised. The status of both is displayed in this screen. The Patient (Billing) Status and the Report Status columns.

   This screen is terrific to get a status update on any current consultation.

   Amongst other activities you can quickly launch the Enter Item Numbers and Billing workflows, perform enquiries on related records such as the patient, referrer, and payor.

3. Once the consultation is billed and their report is authorised it will disappear from this worklist after a configurable timeframe. However it can be redisplayed in this list by selecting "Show All Today" or Show All Yesterday from the View Menu.



Notes

1.5. How To Arrive and Register Patients with an Appointment

Below will explain step by step the way to register a patient's appointment from the OCCAM workstation.

1. Click on the **Arrivals** icon on the OCCAM RIS Toolbar

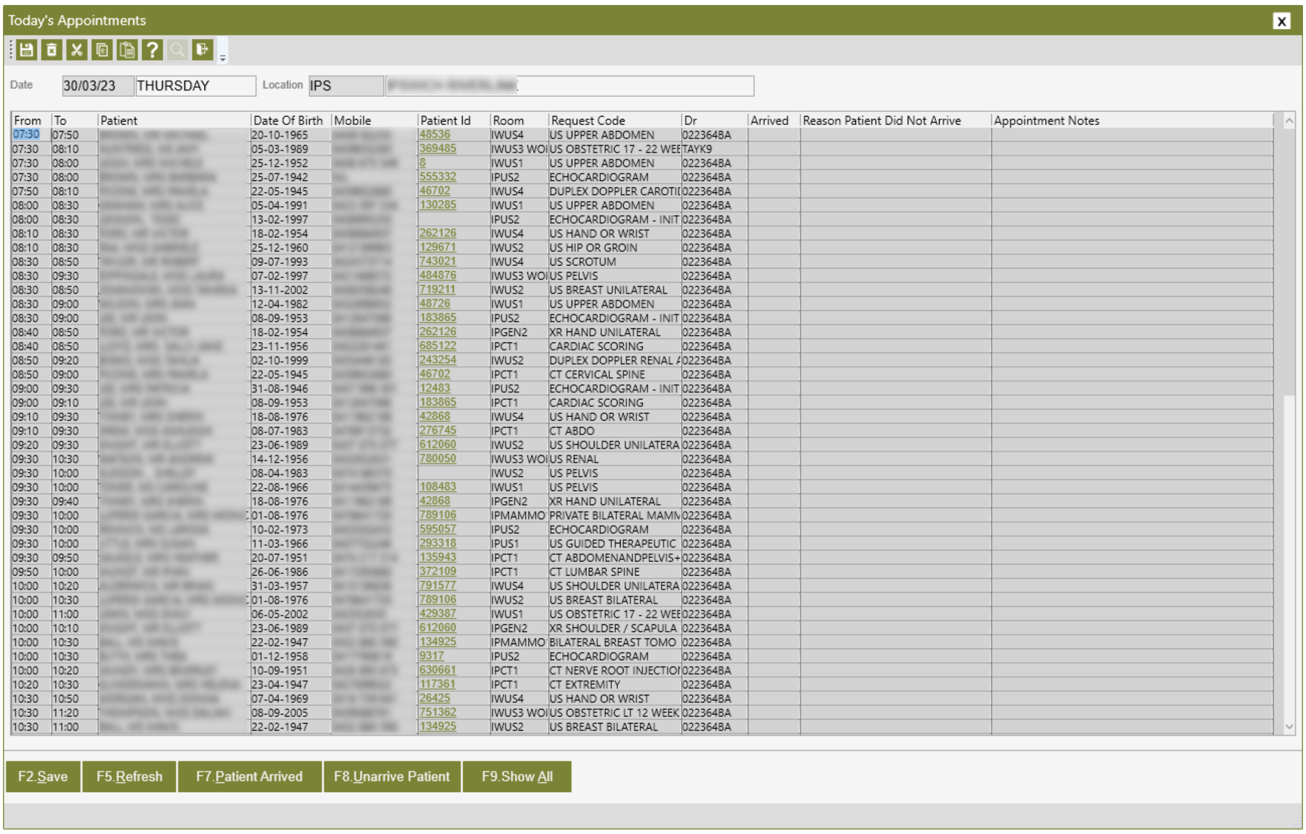
2. This will bring you to Today's Appointments – Arrivals worklist screen,

1.5.1. Arrivals Worklist

The Arrivals worklist displays for a chosen location, appointments which are scheduled for the chosen date. It enables you to quickly register consultations for patients who arrive for a scheduled appointment.

From this worklist you can view expected arrivals, arrive and unarrive patient appointments and record Did Not Arrive reasons. Depending on configuration, appointments which are arrived will disappear from this list after a preconfigured time.

Appointments which have not yet been arrived but are past due will appear highlighted.



Notes

1.5.2. Arriving Appointments

1. Enter the branch and Date that you wish to view. Note: these fields will default to your branch and today's date so you can easily and quickly ENTER key through these fields. A list of scheduled appointments will then appear.
2. Select the Patient in the list that you wish to arrive and press the **F7 Key** or Click the **F7 - Patient Arrived** button.
3. The Date of Birth and/or Mobile Number are good fields from which to can confirm that you have identified the correct patient in the list.

   Note: A patient who has multiple appointments will appear on this list multiple times – in most cases they are referred by the same referrer and can registered and billed as a single consultation. You do not need to arrive each entry. Arriving one of the entries will automatically arrive the subsequent entries.

   Additionally, if an appointment has been Arrived already you may arrive them again.

1.5.3. Un-Arriving Appointments

You can also **Unarrive** a patient if for example you have arrived an incorrect patient.

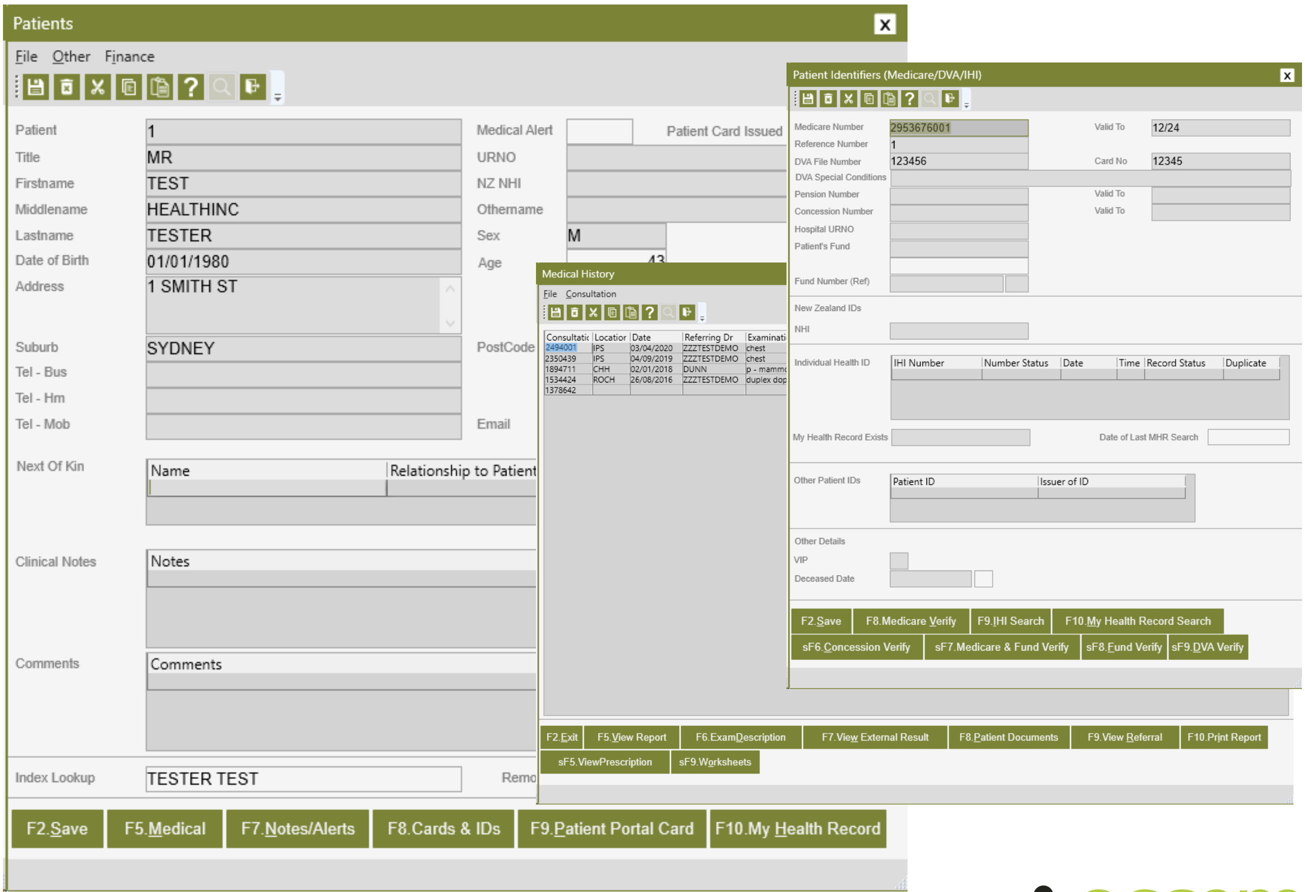
1. Enter the branch and Date that you wish to view. Note: these fields will default to your branch and today's date so you can easily and quickly ENTER key through these fields. A list of scheduled appointments will then appear.
2. Select the Patient in the list that you wish to arrive and press the **F8 Key** or Click the **F8 – Unarrive Patient** button
3. If you do not see the patient that you wish to unarrived press the **F9 – Show All** button, select the patient from the list, and Click the **F8 – Unarrive Patient** button

Notes

1.5.4. Patient Registration

1. Patient Demographic which was entered in the appointment will transfer into the Patient details screen. If this is an existing patient and demographics such as phone numbers have changed, then you will be asked if you wish to update these fields.
2. If any notes have been made in the appointment you will be displayed those notes and given the option of adding them to Patient Clinical notes, comments or to discard them.
3. Using your **Enter** key, navigate through these fields being very careful that you are collecting and typing in the most current and correct details. (Caps Lock)
4. While in this screen click **F5 Medical** this will show you the patients medical history (previous consultations).
5. **F8 Cards and IDs**- you will need to check and/or update the patients cards such as;
    a. Medicare, DVA, Pension/Concession cards
    b. **Verify** cards once added or updated
    c. Click the **F2-Save** Button
6. **F9 - Patient Portal Card** can be used to issue a patient portal card (optional feature)
7. Click the **F2-Save** button
8. You will be asked the following question; **Do You want to Enter Referral details now. Click YES**

Remember to use the ENTER key to navigate through the fields



Notes

1.5.5. Referral Entry (Appointment)

Here you are required to enter the details for the consultation from the information given on the referral. If provided during the appointment some of these fields will be populated with the details from the appointment. Many fields are also automatically populated by configuration.

Remember to use the ENTER key to navigate through the fields

1. **Patient** This is the Patients ID number auto fills, along with Surname and age.
2. **Patient Type** The patient type in OCCAM RIS is a classification applied to a consultation which determines the fees which are charged, who is the payor, gaps which are applied and other settings such as whether they can be included in claims. Notable Patient Types are;

    a. **BULK** – Medicare Bulk Bill
    b. **DVA** – Department of Veteran Affairs
    c. **PRIV** – Private
    d. **WC** – Workers Compensation/Third Party

    Note: Your system may have been configured with additional patient types. Please consult with your practice manager as to the appropriate billing/patient type for consultations

    BULK has been set to default to change. Press the **F3** key to choose a different patient type or if you know the patient type code you can enter it here i.e.: "**PRIV**" and press the Enter key

3. If registering a patient who has multiple appointments, you will be presented a list of Request Codes;

    a. Choose the Request codes that you wish to include in this registration by entering **Y** for each item on the list,
    b. Alternatively Press the Select All button to register them all

OR if just a single appointment/request exists the **Request details**, namely the request code will be auto entered.

Please confirm the request codes are correct. Adjust them if necessary by simply Backspace/Delete the incorrect entry, **F3** to search the correct Exam request.

A consultation can have many request codes so long as they are referred by the same referrer and will be billed as the same Patient Type

4. **Enter** through to **Referrer**

   If the referrer was entered in the Appointment, it will be automatically populated. **Please compare the PROVIDER NUMBERS**

   Otherwise search for the correct referrer by performing an **F3** search – the provider number is the best search field. If not found create a new Referrer by pressing the **F9-New Referrer** Button.

   Other options exist such as ***LOST, HOSPITAL, EMERG, NR***

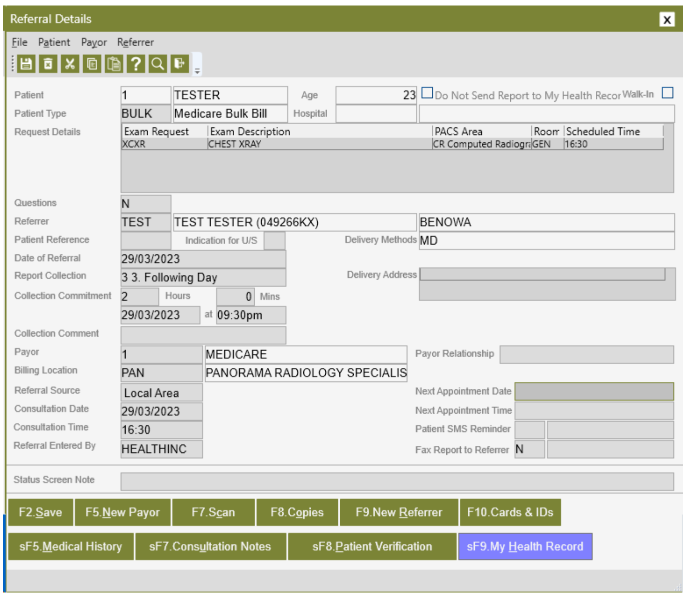
   Patient Reference this will be bypassed.

5. **Date of Referral** there needs to be date here if it is not on the referral you will need to check with the patient or call the clinic.
6. **Report Collection** depending on the urgency or when the patient is returning to the doctor, you would select the appropriate delivery method that complements the doctors request, **F3** to search the methods unless you know the code. ENTER d
7. **Payor** will depend on the Patient type. If this is BULK patient type consultation it will Autofill to "1" Medicare ("2" for DVA).
   a. If Private you will need to **F3** and search for the appropriate payor name.

      Or

   b. Create a new Payor by pressing the **F5 – New Payo**r button. Press Enter on the next screen and the payor's details will be automatically populated with those of the patient. You can change and update them accordingly and upon saving with **F2-Save** OCCAM RIS will attempt to detect duplicate entries.

8. **Referral Source F3** select the appropriate referral source (such as LOCAL or INTERSTATE, HOSPITAL etc) These are configurable in **Setup > Referrer > Referral Source**
9. **Referral Entered By** your initials
10. **F7 Scan** to Scan referral and any relevant documents.
11. **F2 Save**



Notes

1.6. How To Register a Walk in Patient/Consultation

If a patient arrives without an appointment you can create a patient record (or select the existing patient record) and register a consultation..

Click on the **Patient Registration** icon on the OCCAM RIS Toolbar

1.6.1. Patient Registration (Walk-in)

1. **Perform an F3-Search** to determine if the patient has been entered in OCCAM RIS already. Searching by DOB and/or Medicare Card is a great way to correctly search for and select correct patients.
2. **Select the Patient record if one is found**

   Or

   Create a new Patient record by entering in all mandatory fields and navigating by your Enter key,

3. **F8 Cards and IDs** – Enter or check the patients Medicare, DVA, Pension/ Concession card and verify where appropriate.
4. **F2-Save** to save the patient Card details
5. **F2 Save** to save the patient record
6. You will be prompted as to whether you wish to Enter referral details now. Select **Yes**

Notes

1.6.2. Referral Entry (Walk-in)

Here you are required to enter the details of the consultation from the information given on the referral. Many fields are also automatically populated by configuration. This process is the same as that for Referral entry of appointments but requires you to enter in all details which might have otherwise been captured during the appointment.

Remember to use the ENTER key to navigate through the fields

1. **Patient** This is the Patients ID number auto fills, along with Surname and age.
2. **Patient Type** The patient type in OCCAM RIS is a classification applied to a consultation which determines the fees which are charged, who is the payor, gaps which are applied and other settings such as whether they can be included in claims. Notable Patient Types are;

    a. **BULK** – Medicare Bulk Bill
    b. **DVA** – Department of Veteran Affairs
    c. **PRIV** – Private
    d. **WC** – Workers Compensation/Third Party

    Note: Your system may have been configured with additional patient types. Please consult with your practice manager as to the appropriate billing/patient type for consultations

    BULK has been set to default to change. Press the **F3** key to choose a different patient type or if you know the patient type code you can enter it here i.e.: "**PRIV**" and press the Enter key

3. Enter the Request Codes as indicated on the referral form. Use the **F3 Search** key to identify the correct request codes. When searching you can enter in parts of the description such as "CHEST"

    Confirm the request codes are correct. Adjust them if necessary, by simply Backspace/Delete the incorrect entry, **F3** to search the correct Exam request.

A consultation can have many request codes so long as they are referred by the same referrer and will be billed as the same Patient Type

Notes

4. **Enter** through to **Referrer**

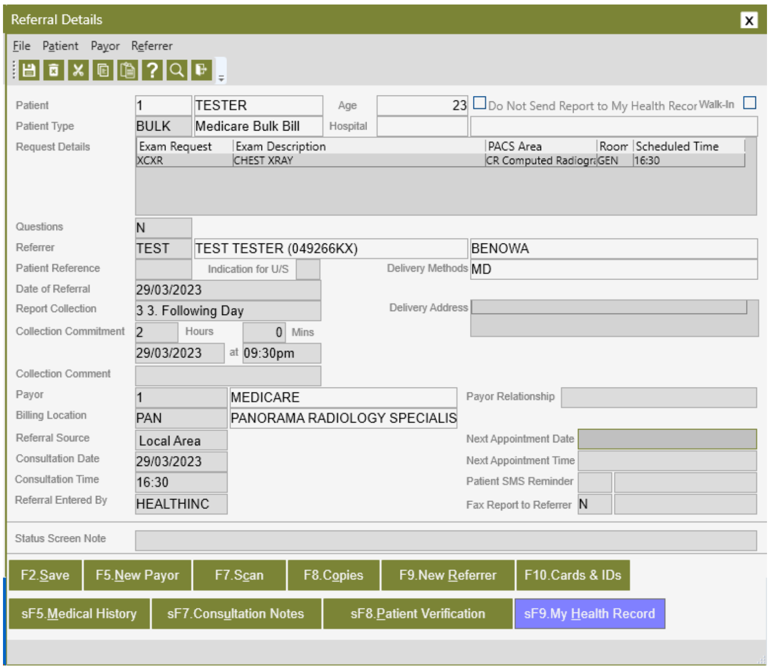
   Search for the correct referrer by performing an **F3 Search** – the provider number is the best search field. If not found create a new Referrer by pressing the **F9-New Referrer** Button.

   Other options exist such as ***LOST, HOSPITAL, EMERG, NR***

5. **Patient Reference** this will be bypassed
6. **Date of Referral** there needs to be date here if it is not on the referral you will need to check with the patient or call the clinic.
7. **Report Collection** depending on the urgency or when the patient is returning to the doctor, you would select the appropriate delivery method that complements the doctors request, **F3** to search the methods unless you know the code.
8. **Payor** will depend on the Patient type. If this is BULK patient type consultation it will Autofill to “1” Medicare (“2” for DVA).
   a. If Private you will need to **F3** and search for the appropriate payor name.

      Or

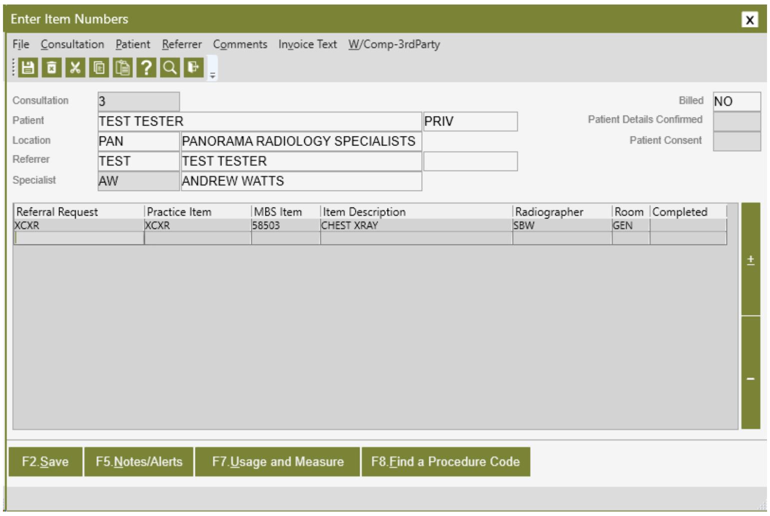
   b. Create a new Payor by pressing the **F5 – New Payor** button. Press Enter on the next screen and the payor’s details will be automatically populated with those of the patient. You can change and update them accordingly and upon saving with **F2-Save** OCCAM RIS will attempt to detect duplicate entries.
      I
9. **Referral Source F3** select the appropriate referral source (such as LOCAL or INTERSTATE, HOSPITAL etc) These are configurable in **Setup > Referrer > Referral Source**
10. **Referral Entered By** your initials
11. **F7 Scan** to Scan referral and any relevant documents.
12. **F2 Save**



Notes

1.7. How To Enter Item Numbers for a Consultation

Depending on the preferences of the practice, item numbers (billing numbers) can be entered by either the technical staff (Radiographers, Sonographers etc) or by Administration staff at the time of billing.



1.7.1. Radiographer Workflow

1. Click on the **Radiographer Worklist** icon on the OCCAM RIS Toolbar

2. Once your patient has been registered and finished their scan you are able to **itemise** the study by identifying and selecting the consultation on the **worklist**.
3. **F6 Items** – Enter Item Numbers
4. **F2 Save**

1.7.2. Administration Staff Workflow

5. Click on the **Enter Item Numbers** icon on the OCCAM RIS Toolbar

1. Search for the Consultation using **F3 Search** (a blank search will provide a list of consultations requiring Item numbers)
2. Enter in Billing Specialist, Item Numbers being sure to select the appropriate Radiographer and Exam Room.
3. **F2-Save** and you will be prompted as whether you wish to Bill the Consultation. Choose Yes or No accordingly.

Notes

2. Common Administration Tasks

2.1. Add Additional (Copy To) Referrers to a Consultation

How to re-send a report to another Referrer's Medical Objects file, this would be a different Referrer to the actual referrer.

1. Click on the **Consultation Enquiry** icon on the OCCAM Main Toolbar

2. Enter the consultation number OR **F3** Search to find and select the correct consultation.
3. **Click the following menu item from the Consultation Enquiry screen; Consultation > Change Consultation After Billing**
4. **F7 Copy To**
5. **F3 Search** to search for the delivery method if unsure of code (MD)
6. **F3** to search for the up the additional copy to referrer details or type in referrer code if known.
7. **F2 Save**
8. **F2 Save** again
9. **If the consultation has been authorised, then please follow steps outlined in [2.1.2 How To Recreate Referrer Email]**

2.1.2. How To Recreate Referrer Email

Recreate Referrer Email in circumstances where delivery failed, adding additional referrers after the consultation report has been authorised or if the referrer asks for it be resent.

1. Click on the **Consultation Enquiry** icon on the OCCAM Main Toolbar

2. Type consultation number that you wish to resend OR **F3 Search** to and select the correct study to be re-sent.
3. **Click the following menu item from the Consultation Enquiry screen; Consultation > Change Consultation After Billing**
4. **F5 Recreate Email**

   This will cause the consultation report to be placed on to the delivery queue according to the referrer's delivery preferences (i.e.: Medical Objects, HealthLink etc)The outbound queue can be viewed by selecting the following menu item **Patients > Remove Consultation From Email List**

Notes

2.1.3. How To Add a New Referrer to OCCAM RIS

1. From OCCAM RIS Main Menu click on **Setup > Referrers > Referrers**
2. **Code** First 3 initials of their surname 1st letter of their first name if this code already exists add a 1 on the end and so on until you secure a code .e.g. Dr Jennifer Aniston (ANIJ) OR (ANIJ4) All text to be in capitals.
3. **Active** Y or N if Dr is no longer using this provider number.
4. **Date inactive** Bypass this if Y

> *Remember to use the ENTER key to navigate through the fields*

5. **Title** Dr/Mrs/Ms/Miss/Mr/Prof.
6. **Last Name/First Name/Middle Name** Make sure you are doing this is the order asked.
7. **Practice Name** If the patient can't remember or the referral doesn't state this, do try to get this information somehow.
8. **Address** Fill in as much detail as you can.
9. **Suburb, Postcode, State, Country** F3 to type and search or type it in.
10. **Telephone (business)** Make sure you are inputting the area code prior to number (07) ********
11. **Fax (business)** The area code is a must otherwise your automatic faxes will not go through. (+617) ********
12. **Mobile** As long as the doctor has given you their number.
13. **Marketing email address** you might like to have this for future campaigns.
14. **Provider number** 8 characters, it will prompt you if incorrect or invalid.
15. **Specialist Field** F3 to search or you may know the abbreviation already. (CHIRO) (DENT)
16. **Deliver Report By** The most common delivery method is via Encrypted Email, to check if this Dr is registered you will need to look them up on Medical Objects if you have access. Some might prefer a Fax, maybe they have neither but have access to a PACS software. **F3** and select correct method.

    Note: referrers can have multiple report delivery methods including MD, FAX etc.

17. Enter all the way through to **Copies to.**
    a. **Copies To -** You can add automatic copy to referrers to the referrer so that the reports referred by this referrer will be automatically sent to the additional referrers that you define here.

       For example; A referrer may require that a copy of their reports to be sent to an additional location from which they operate from. Use this feature to fulfill their preference and avoid having to manually add a copy to referrer at registration – a process which is prone to human error or not being done.

    b. **Referrer Code** - F3 to search and select the doctor. If this doctor is not in the system at this other location, they will need a file created just like you are now and then added as a copy doctor.
18. **Referral Source** (F3) you will see a list of other Radiology Companies, you would select the one that matches the referrals that you're processing. (This will help with future stats)
19. **F5 Comments** Leaving comments is a great why to know what the Dr requires; this will pop up at registration time, for example: Referrer Requires Film
20. **F2 Save**

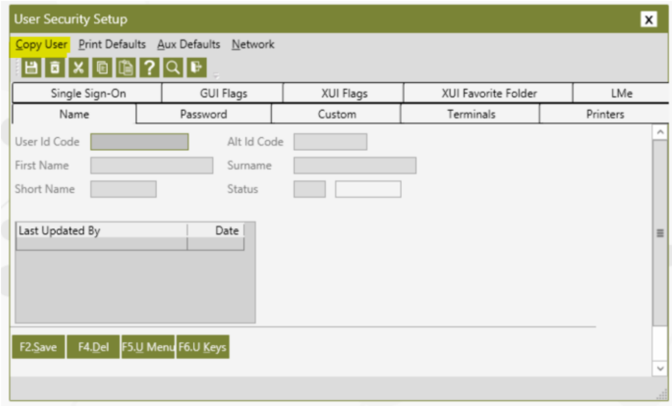
Notes

2.1.4. Set up new user login

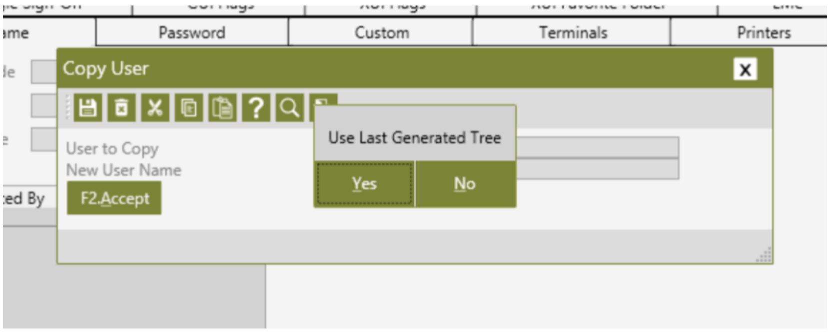
Setup>Users>User logins

Will then ask for a password in which you logged in to the computer with.

Click on ***Copy User***



F3



Yes

Choose a staff member in the same role (reception) double click!

Next line down type what the new users' initials are going to be.

Accept

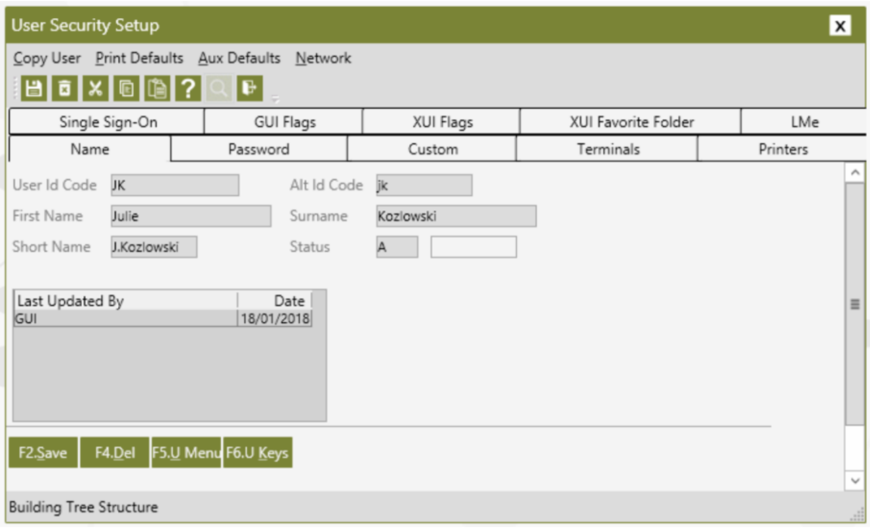
User ID Code -the new user initials in CAPITAL

Alt ID Code- initials in lower case

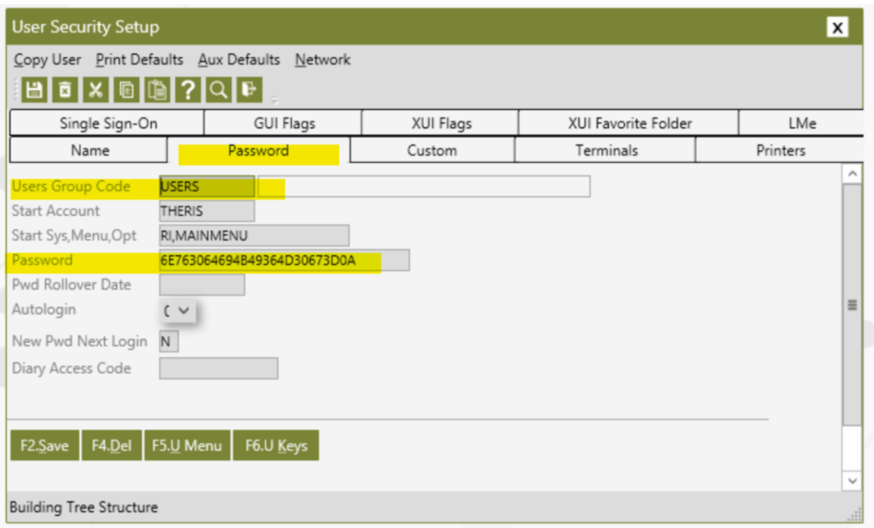
First name and **Surname**

Short Name will autofill

Status needs to be set to **A** for active. (staff who have resigned can be changed to R)



Click the tab across to the right **Password**



User Group Code- this is where you can check or change the users category eg Admin, Managers, Tech.

Password- Back space the current password and enter XXXX (same if you need to ever reset a PWD)

New PWD Next Login- Y

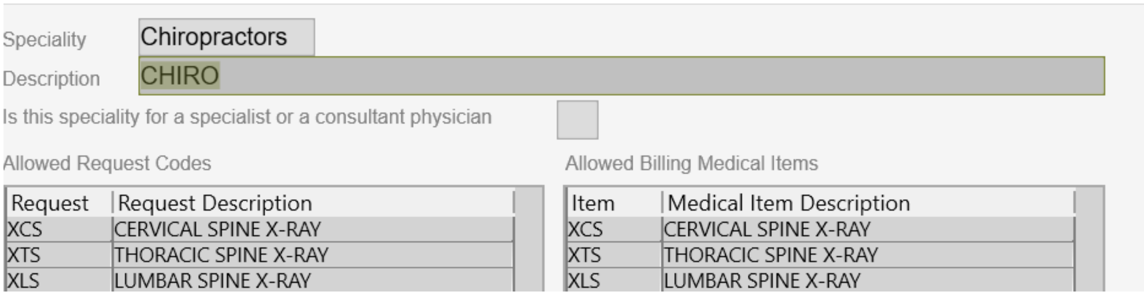
Save

Notes

2.1.5. How to Add Referrer Specialties to the System

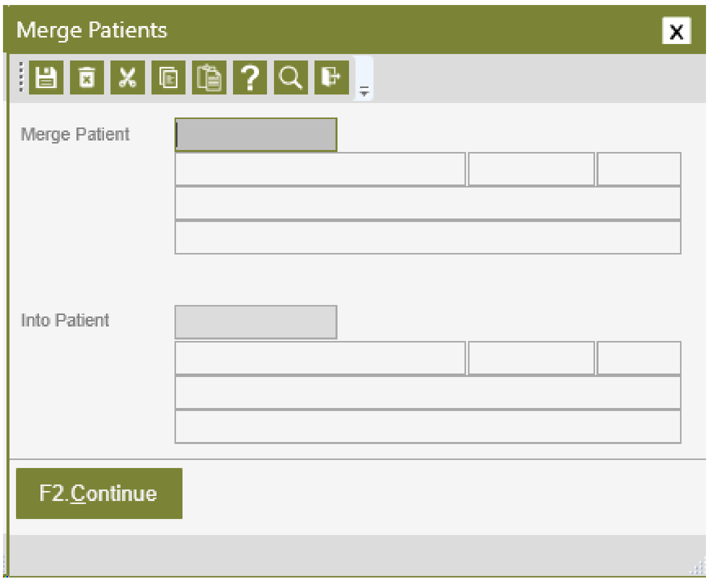
Adding a new specialty field and code, along with which items this specialty can request and be billed for.

1. **Setup> Referrers > Referring Specialties**
2. **Specialty** Enter the Speciality Code i.e.: CHIRO
3. **Description** Enter the Description of the Referrer Speciality i.e.: Chiropractors



2.1.6. How To Merge Patient Records

A **Patient Merge** would normally occur when a duplicate record has been inadvertently created.



1. From OCCAM RIS main menu click on **Setup > Merges >Merge Patients**
2. **F3 Search** or type patient ID here (This patient's reports will merge over to the below patient file)
3. **F3 Search** or type patient destination patient ID
4. **F2 Continue to perform the Merge.**

Merges are NOT reversable.

Notes

2.1.7. Commonly used reports

REPORTS>CONSULTATIONS>CONSULTATIONS OUSTANDING BY PERIOD

REPORTS>CLAIMS>UNBATCHED MEDICARE AND DVA CONSULTATIONS

REPORTS>REFERRER>REFERRING DR PATIENT

REPORTS>REFERRER>TOP REFERRING TO MAILMERGE OPTION

REPORTS>REFERRER> REFERRING DR ADDED TO DATABASE

REPORTS>GST>GST SUMMARY BY CONS DATE ACCRUAL

REPORTS>AUDIT TRAILS>BILLED/CANCELED BILLS

REPORTS>AUDIT TRAILS>REFUNDS

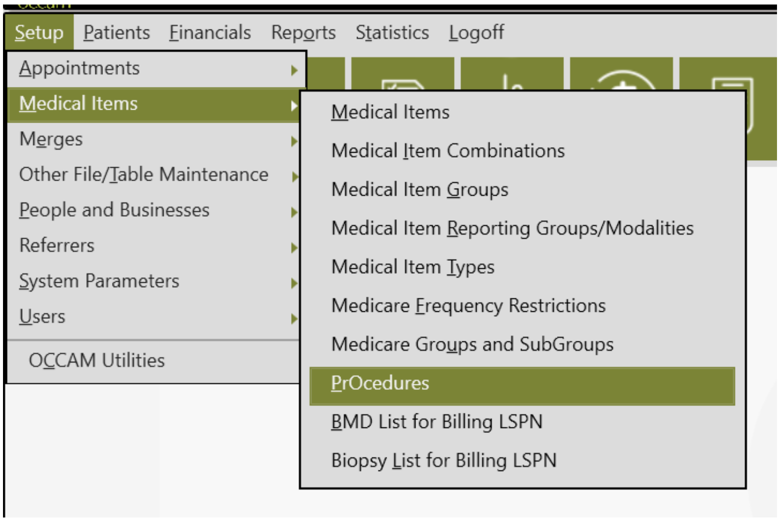
REPORTS>AUDIT TRAILS>WRITE OFFS

STATISICS>EXAMS>EXAMS BY MODALITY-TOTALS ONLY

REPORTS>PAYOR> PAYOR FOLLOW NOTES- (TO ADD A NOTE FINANCIALS>PAYOR>PAYOR FINANCIAL NOTES)

2.1.8. Adding in Procedure codes (PROC CODE)

Setup>Medial Items> Procedures

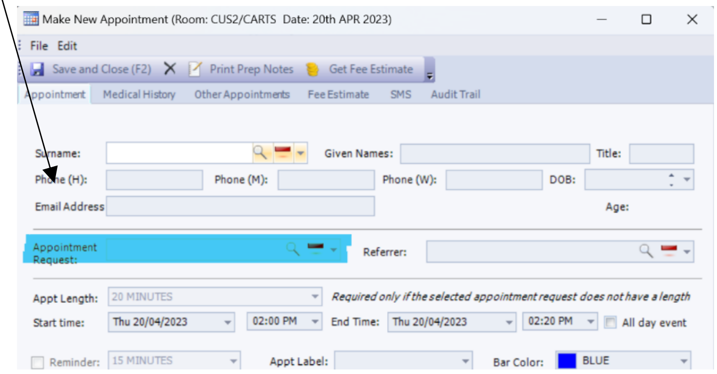


- Create your Proc code or F3 to search a Proc code.
- Type in your description of this procedure
- **Medical item** -if you know the item code type in or F3 to search by name or Medicare item number.
- **Save**

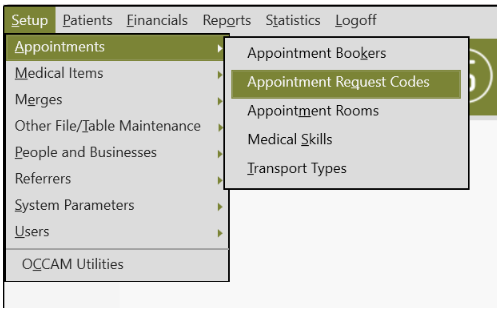
Notes

2.1.9. How to add an Item or PROC code to the Appt request codes.

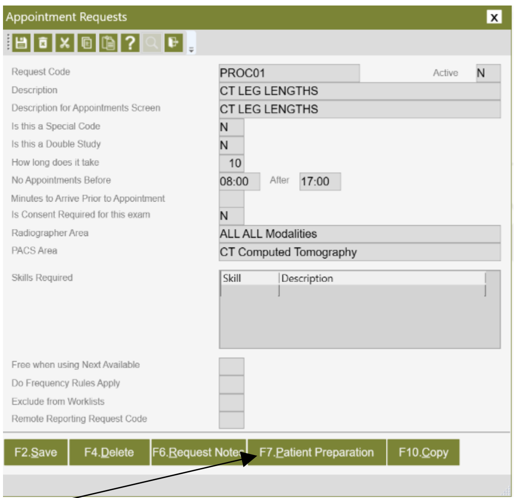
This is so it can be viewed in the appointment requests when making a booking.



Setup>Appointments>Appointment Request Codes



- Add in the request code or F3 to search for one. If it is a new code you will be able to fill in the below or edit an pre-existing code.



Here is where you will add the preparation notes that are linked to this type of scan/procedure.

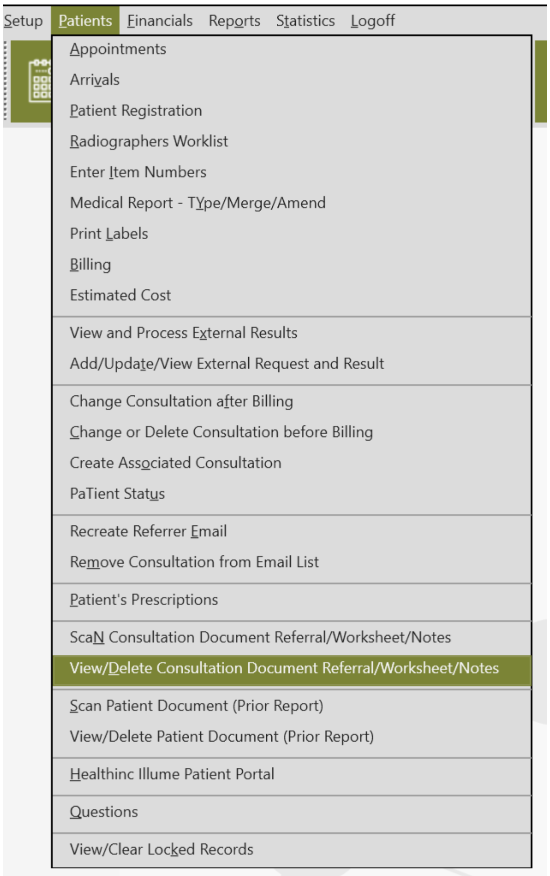
You will also see these notes when you are booking an appointment.

Notes

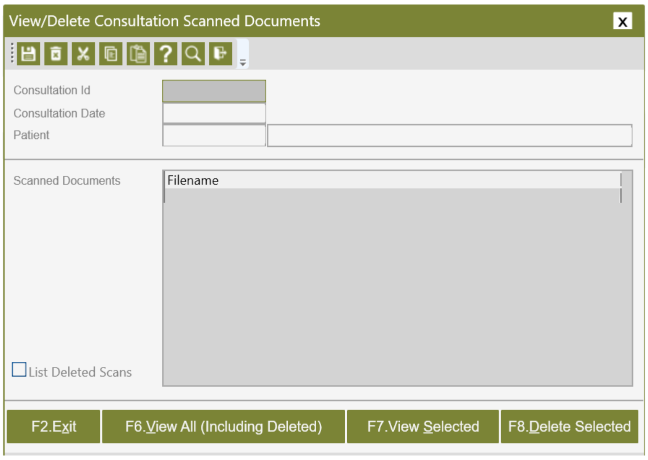
2.2. How to Delete documents out of a Patients file

If a referral or document has been scanned in to the wrong pt file this is how you would delete it.

Patients> View/Delete consultation Document Referral/worksheet/notes



Search Consultation number, All files that have been scanned will populate below filename.



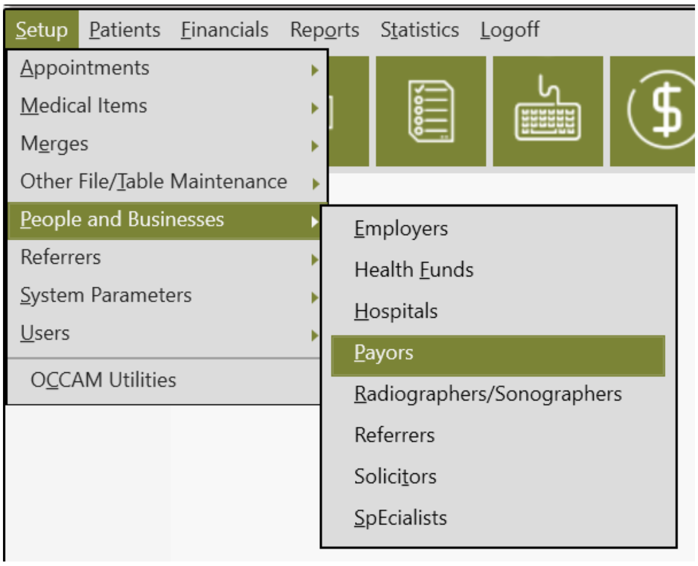
To check that you are deleting the right file click on each and then click **View Selected** if that is the one you want to delete then click on **Delete Selected**. This will then make those files inactive marking them Red

Notes

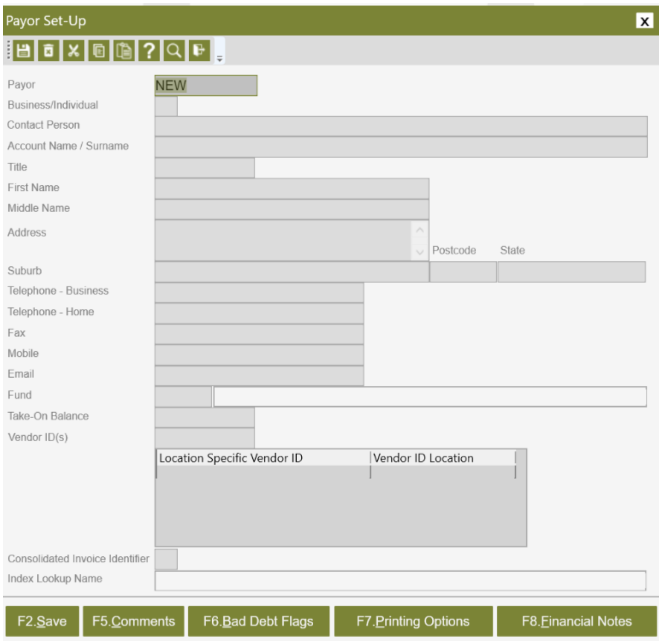
2.2.1. How to Set up New Payor from Main Occam Screen

A New Payor can be set up either at the time of patient registration by clicking **New Payor** or it can be done from the Occam Main Screen.

Setup>People and Businesses>Payors



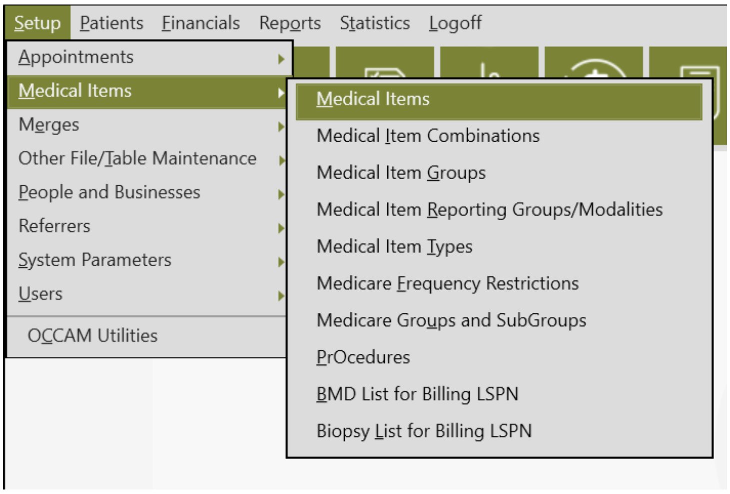
- Click **Enter** if New payor or **F3** to search existing Payor
- For Business select (**B**)
- For a patient/individual select (**I**)
- Continue to fill in all necessary information
- **Save**

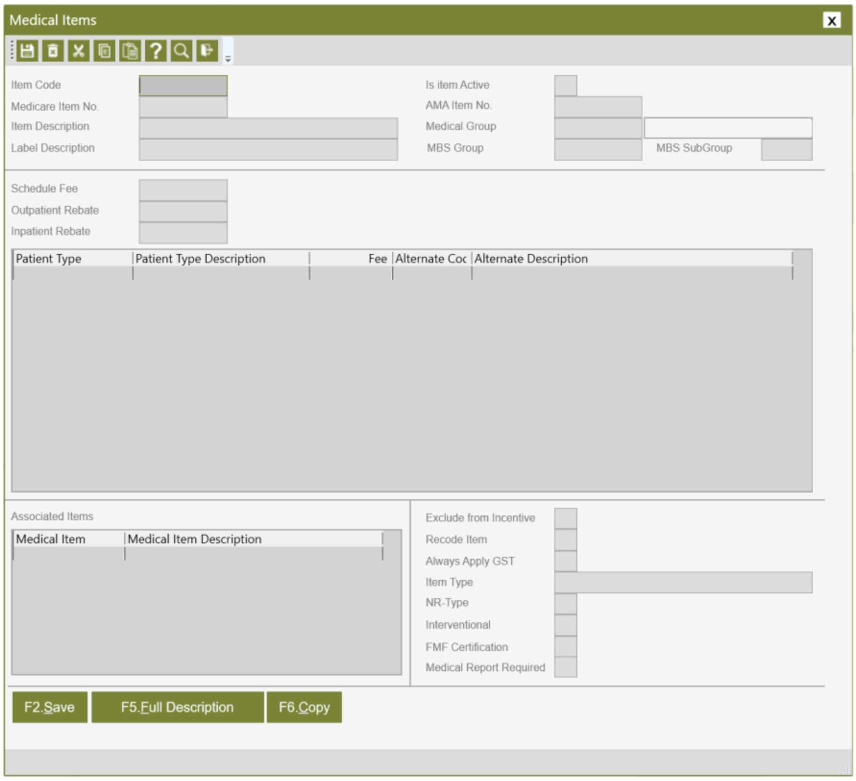


notes

2.2.2. Adding in or Viewing Medial Items

Setup>Medical Items> Medical Items





To make your life easier when creating a new Item code try and find the same item in your system to **Copy**, so that all details eg fee's and Full Description come across, all you then need to do it update the **Item code**.

(you can make up your own item code) at the top and the **Item Description.**

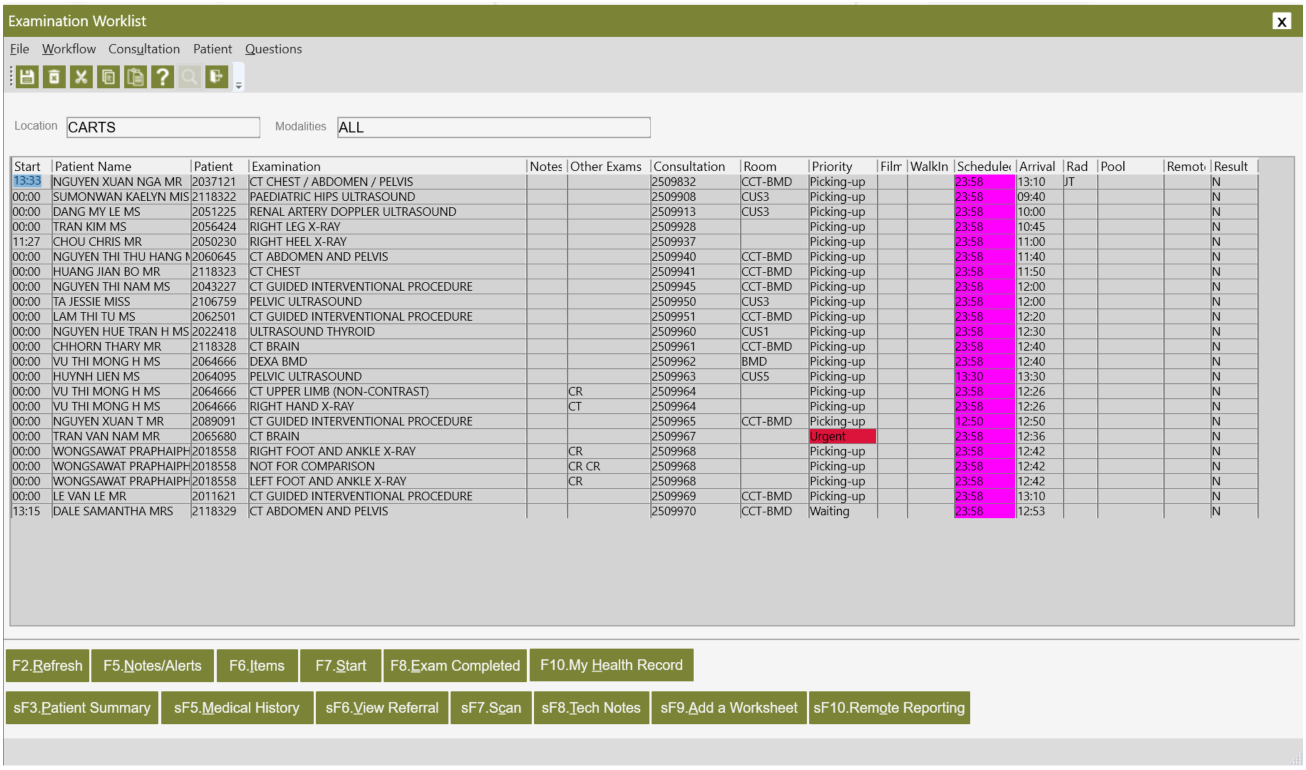
notes

3. Radiographer/Sonographer Workflow

3.1. Radiographer Worklist

From the toolbar on the OCCAM RIS screen select the icon **Examination Worklist**

The Examination worklist will inform you of the patients who have been registered for an examination, you will see if their scan has been started, which room they are book into, their scheduled time along with the arrival time. You are also able to view the priority that they have been registered as, this will help you determine when the patients doctor will expect the report. Which then helps the patient organise when they are to see their doctor next



Start	Patient Name	Patient	Examination	Notes	Other Exams	Consultation	Room	Priority	Film	WalkIn	Schedule	Arrival	Rad	Pool	Remote	Result
13:33	NGUYEN XUAN NGA MR	2037121	CT CHEST / ABDOMEN / PELVIS			2509832	CCT-BMD	Picking-up			23:58	13:10	JT			N
00:00	SUMONWAN KAELYN MIS	2118322	PAEDIATRIC HIPS ULTRASOUND			2509908	CUS3	Picking-up			23:58	09:40				N
00:00	DANG MY LE MS	2051225	RENAL ARTERY DOPPLER ULTRASOUND			2509913	CUS3	Picking-up			23:58	10:00				N
00:00	TRAN KIM MS	2056424	RIGHT LEG X-RAY			2509928		Picking-up			23:58	10:45				N
11:27	CHOU CHRIS MR	2050230	RIGHT HEEL X-RAY			2509937		Picking-up			23:58	11:00				N
00:00	NGUYEN THI THU HANG M	2060645	CT ABDOMEN AND PELVIS			2509940	CCT-BMD	Picking-up			23:58	11:40				N
00:00	HUANG JIAN BO MR	2118323	CT CHEST			2509941	CCT-BMD	Picking-up			23:58	11:50				N
00:00	NGUYEN THI NAM MS	2043227	CT GUIDED INTERVENTIONAL PROCEDURE			2509945	CCT-BMD	Picking-up			23:58	12:00				N
00:00	TA JESSIE MISS	2106759	PELVIC ULTRASOUND			2509950	CUS3	Picking-up			23:58	12:00				N
00:00	LAM THI TU MS	2062501	CT GUIDED INTERVENTIONAL PROCEDURE			2509951	CCT-BMD	Picking-up			23:58	12:20				N
00:00	NGUYEN HUE TRAN H MS	2022418	ULTRASOUND THYROID			2509960	CUS1	Picking-up			23:58	12:30				N
00:00	CHHORN THARY MR	2118328	CT BRAIN			2509961	CCT-BMD	Picking-up			23:58	12:40				N
00:00	VU THI MONG H MS	2064666	DEXA BMD			2509962	BMD	Picking-up			23:58	12:40				N
00:00	HUYNH LIEN MS	2064095	PELVIC ULTRASOUND			2509963	CUS5	Picking-up			13:30	13:30				N
00:00	VU THI MONG H MS	2064666	CT UPPER LIMB (NON-CONTRAST)		CR	2509964		Picking-up			23:58	12:26				N
00:00	VU THI MONG H MS	2064666	RIGHT HAND X-RAY		CT	2509964		Picking-up			23:58	12:26				N
00:00	NGUYEN XUAN T MR	2089091	CT GUIDED INTERVENTIONAL PROCEDURE			2509965	CCT-BMD	Picking-up			12:50	12:50				N
00:00	TRAN VAN NAM MR	2065680	CT BRAIN			2509967		Urgent			23:58	12:36				N
00:00	WONGSAWAT PRAPHAIPH	2018558	RIGHT FOOT AND ANKLE X-RAY		CR	2509968		Picking-up			23:58	12:42				N
00:00	WONGSAWAT PRAPHAIPH	2018558	NOT FOR COMPARISON		CR CR	2509968		Picking-up			23:58	12:42				N
00:00	WONGSAWAT PRAPHAIPH	2018558	LEFT FOOT AND ANKLE X-RAY		CR	2509968		Picking-up			23:58	12:42				N
00:00	LE VAN LE MR	2011621	CT GUIDED INTERVENTIONAL PROCEDURE			2509969	CCT-BMD	Picking-up			23:58	13:10				N
13:15	DALE SAMANTHA MRS	2118329	CT ABDOMEN AND PELVIS			2509970	CCT-BMD	Waiting			23:58	12:53				N

3.1.1. Resend to the Radiographer Worklist

If a consultation is not appearing on the radiographer worklist, it may have been completed or some other error may have occurred. You can resend the back to the worklist by the following;

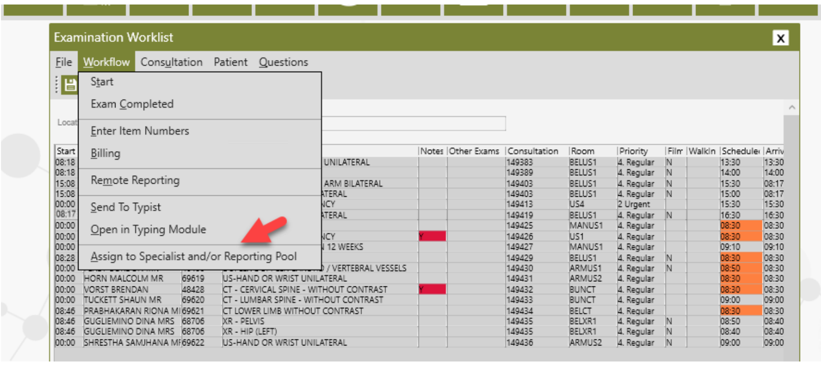
1. Go to the Patient Status (Traffic lights) Screen
2. Locate and select the consultation of concern
3. From the Patient Status Menu select **Workflow > Resend to Worklist**
4. The consultation of concern should now appear on the Radiographer Worklist

Notes

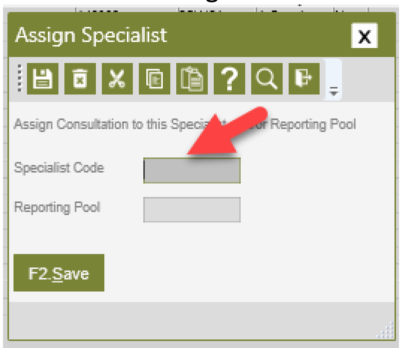
3.1.2. Assigning Radiologist to reports

All consultations are normally visible for all Dr's as that enhances the reporting flow. They can then assign cases to themselves or someone else if that is the agreement between them but generally all unreported consultations are visible to all Dr's.

If someone is going to be "assigning" consultations to specific Dr's for reporting they would do that from the Examination Worklist under Workflow > Assign to specialist.



And then entering their initials as registered in Occam



Dr's usually prefer to assign(select) their own cases, they will right click on a consultation and then click assign this will be from the Radiologist's worklist.

Notes

3.1.3. How to Start a Consultation

Starting an examination allows the capturing of statistics and manages workflow amongst team members. To start a consultation, do the following;

1. Locate and select the consultation that you wish to start in the Radiographer Worklist
2. Press the **F7-Start** button.

3.1.4. How To Complete a Consultation

1. Click on the **Radiographer Worklist** icon on the OCCAM RIS Toolbar

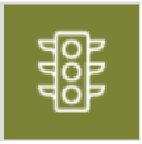
2. If the patient examination is complete, all worksheets have been completed and the consultation is ready to be reported by the radiologist you may now Complete the consultation.
3. Select the consultation from the Radiographer Worklist and press the **F8 Exam Completed button.**
4. You will be asked are you sure you want to complete this exam? **CONTINUE**
5. This will complete and remove from worklist and mark it as ready for reporting on the Radiologist worklist.
6. If a consultation has multiple examinations of the same MODALITY, then completing one of those consultations will automatically complete the additional exams of the same modality for that consultation.
7. If however a patient has other examinations of a different MODALITY then those other requested procedures with a different modality will need to be Completed separately by repeating the above process.

Notes

4. OCCAM RIS Billing

4.1 How To Bill a BULK Patient from the Traffic Lights

1. Navigate your way to the OCCAM Toolbar and click on the **Traffic Lights** icon



- Enter through the top fields making sure you have selected the correct clinic location
- Find and select patients name
- Check that the patient status is marked as **Exam Complete**
- **F7 Bill**
- Billing screen will open type your **initials** in the grey space to the right
- **Enter** through checking each field as you go
- **F2 Save**

4.1.1. How To Bill a Private Patient Consultation

1. If you are taking immediate payment once the patient has come from their scan you will be able to find them easily from the **Traffic lights (Patient Status)**

Check that the patient status is marked as **Exam Complete**

- Select the consultation from the Traffic Lights worklist
- **Press F7 Bill button**
- **Bill Consultation**
- **Make Payment**
- **Clinic Location**
- **Initials**
- Click in space **Card/ Cash** which ever may be patients preferred option
- Type payable fee
- **Patient name or payor name**
- Take payment EFT/Cash
- **F2 Finalise Payment**
- Print Invoice (attached Eft Receipt if applicable/ and note down Cash takings)

Notes

4.1.2 How To Cancel a Bill

1. From the OCCAM RIS Main menu select **Financials** > **Financial Transactions > Cancel a Bill**
2. Search for and select the appropriate consultation **Enter**
3. Add your **Initials**
4. **Select the Bill Consultation you wish to cancel**
5. **F6 Cancel the Bill**
6. Record the reason for the cancellation
7. **F2 Save**

Note: Consultations which have been batched will first need to be removed from the Batch before they can be cancelled.

4.1.3 Change or Delete Consultation Before Billing

The process on how to change/update and or delete a consultation prior to it being billed. (If this consult has been billed you will need to cancel the bill first)

1. From your OCCAM RIS Main menu select **Patients > Change or delete Consultation Before Billing**
2. Search for and select the appropriate consultation **Enter**
3. Make the required changes and **F2 Save**

4.1.4 How to Batch a claim

1. From the OCCAM RIS Main menu Select **Financials > Claims> Claim Creation for Bulk Bill and DVA claims**
2. **Claim Payor**
   a. 1 for Medicare
   b. 2 for DVA
3. Enter Mandatory Fields including the specialist for whom you wish to create a batch for
4. You want asked whether the contents of the batch should be sorted in **Original Order** or **Patient Order**
5. **Choose your desired answer as per your personal preferences.**
6. **Consultations which need to be batched will appear in the list**
7. **F2 save**
8. **The claim will be transmitted to Services Australia for processing.**

Notes

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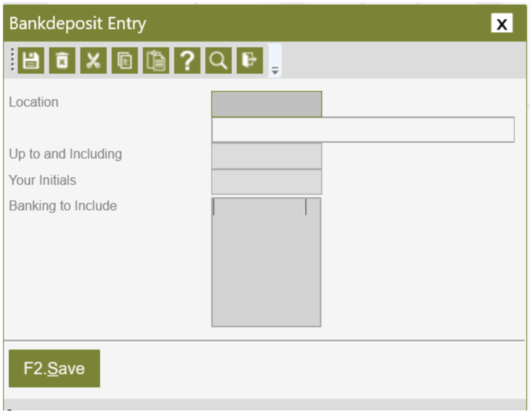
4.1.5 End Of Day Banking

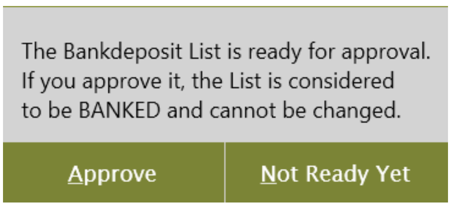
How to show and approve your daily takings

1. Click on the **Reports** tab from the ribbon along the top of your OCCAM screen

- **End of day/End Of Period>Bank Deposit**
- Press **Esc** to end this display



- **Location- F3** lookup location or type location initials
- **Up to and including** The bank deposit list will include all receipts up to and including this date that have not appeared on a bank deposit list
- **Your Initials** type in your initials
- **Banking Including** you can **F3** to open the options and choose from the list (Cash, Cheque, Direct Payments, EFTPOS
- **F2 Save**
- **Bank deposit list** cross check this list with your daily takings
- If correct and happy to proceed click **File** top left corner
- **Print**



- Warning will appear
- **Approve** if correct
- **Not Ready Yet**- you can then get back in to approve prior to close.

The Quick User Guide is covers high level overview and fundamentals of OCCAM RIS and a guidance on some of the common features you may use throughout your daily routine.

Please seek support from our friendly Healthinc Team for further guidance

Email support@healthinc.com.au
Phone 1800 882 443