

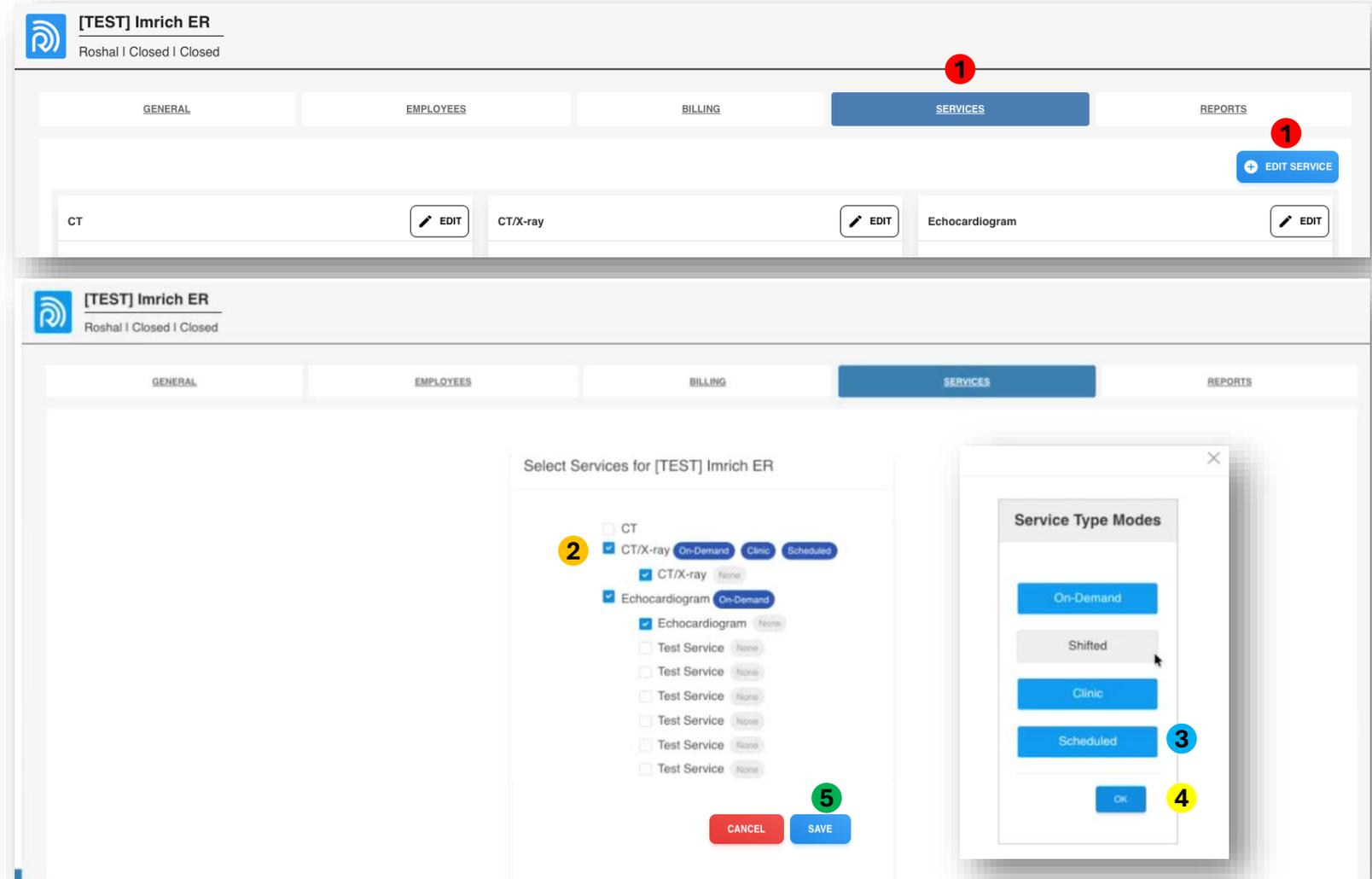
Admin - Scheduled Orders Training

Date: 2/11/26

Configuring the Facility and Service Types

1. Configuring the Facility and Service Types

- 1 • To properly set up a facility with **Scheduled Service Types** navigate to the facility setup screen and select **Services** then **Edit Service**
- 2 • Next, select the specific service that you would like to add and a **pop up** will appear
- 3 • Select the **Scheduled** option to add Scheduled Services to that facility's service type
- 4 • Press **OK** once completed
- 5 • Finally, scroll down to the bottom of the screen and hit **Save**



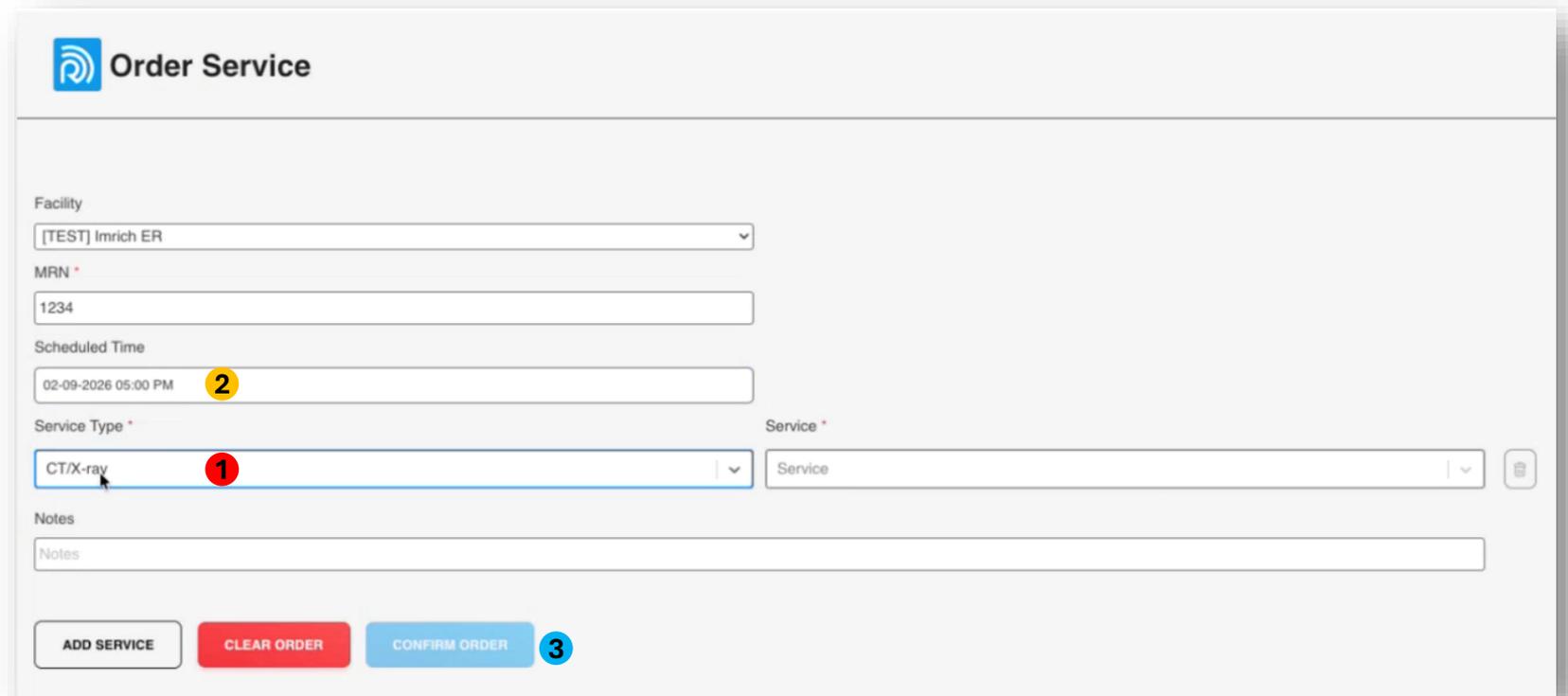
The screenshot displays the Roshal Health facility configuration interface for "[TEST] Imrich ER". The interface is divided into several tabs: GENERAL, EMPLOYEES, BILLING, SERVICES, and REPORTS. The SERVICES tab is active, showing a list of services: CT, CT/X-ray, and Echocardiogram. Each service has an EDIT button. A red circle '1' highlights the SERVICES tab and the EDIT SERVICE button.

The second screenshot shows the "Select Services for [TEST] Imrich ER" dialog box. It lists services with checkboxes and buttons for selecting service type modes. The CT/X-ray service is selected, and the Echocardiogram service is also selected. A yellow circle '2' highlights the CT/X-ray service. A pop-up window titled "Service Type Modes" is open, showing buttons for On-Demand, Shifted, Clinic, and Scheduled. A blue circle '3' highlights the Scheduled button. A yellow circle '4' highlights the OK button. A green circle '5' highlights the SAVE button at the bottom of the dialog box.

Creating the Scheduled Order

2. Creating the Scheduled Order

- 1 • When creating an order, if the selected service type on the specific facility is configured to handle scheduled orders, then you will see a **Scheduled Time** option appear
- 2 • Select the **date/time** you would like to schedule the order for
 - Admins can select any date/time that is in the future
 - Clients must select a date/time that is:
 - At least 2 hours in the future
 - Between 9am – 5pm EST
 - During a weekday
- 3 • Press **Confirm Order** once completed
 - **Market Manager** will receive notifications for the order



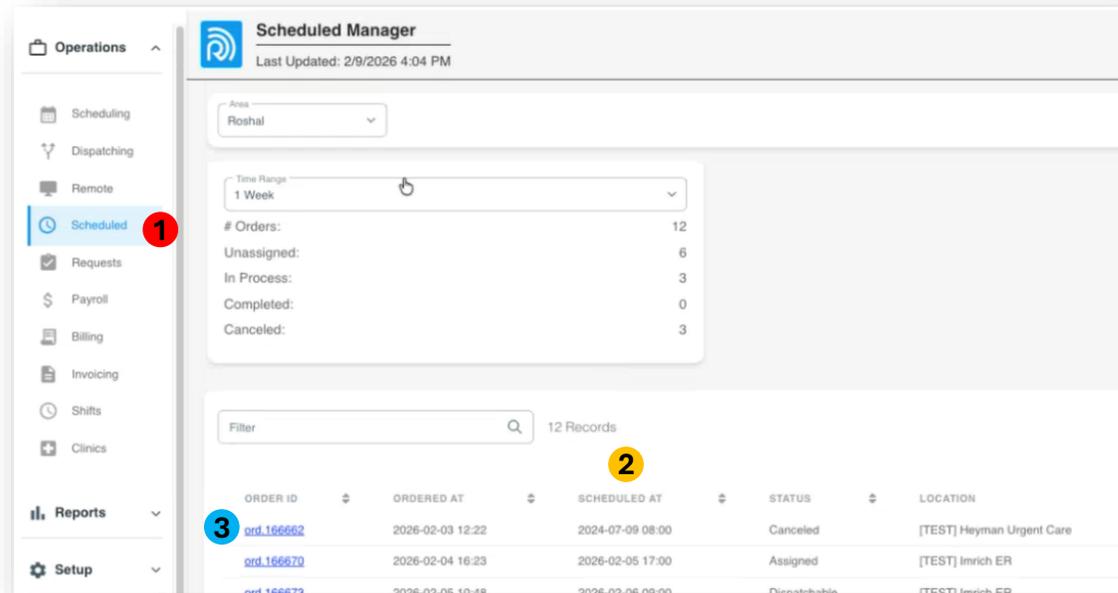
The screenshot shows the 'Order Service' form with the following fields and callouts:

- Facility:** [TEST] Imrich ER
- MRN *:** 1234
- Scheduled Time:** 02-09-2026 05:00 PM (Callout 2)
- Service Type *:** CT/X-ray (Callout 1)
- Service *:** Service
- Notes:** Notes
- Buttons:** ADD SERVICE, CLEAR ORDER, CONFIRM ORDER (Callout 3)

Managing the Scheduled Order

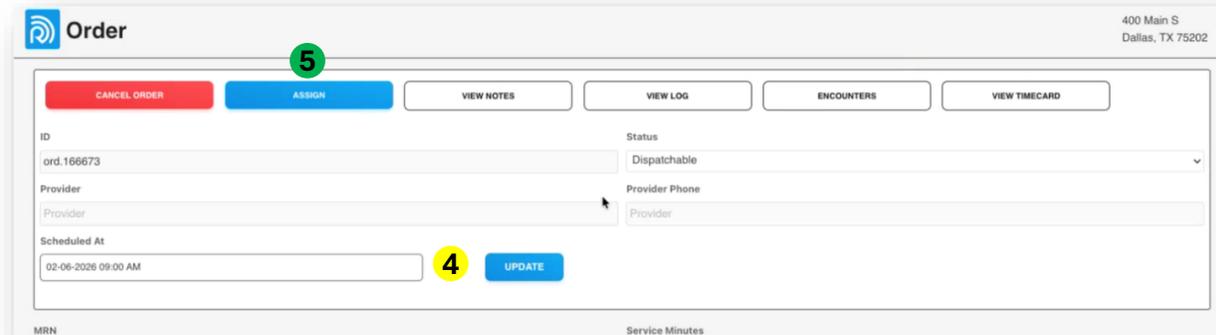
3. Managing the Scheduled Order

- 1 • Navigate to the new **Scheduled** menu tab to review, monitor, and manage all scheduled orders.
- 2 • Refer to the **Scheduled At** column to determine when the order is scheduled for.
- 3 • Click inside of an **Order** to manage it.
- 4 • Once in an order you can update the **Scheduled At** time if need be.
- 5 • As of now, the Manager **must** manually assign the order to a specific provider (once assigned the provider will be notified).
 - NOTE: At some point this will go through dispatch, but for now it is manual.

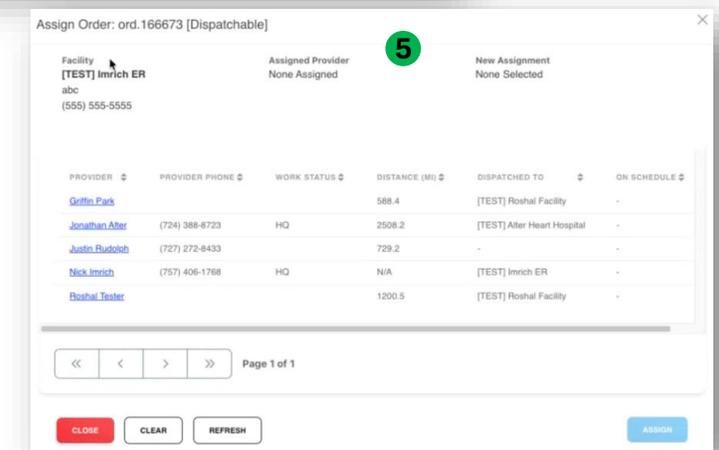


The screenshot shows the 'Scheduled Manager' interface. On the left is a navigation menu with 'Scheduled' highlighted. The main area shows a summary for 'Area: Roshal' with a 'Time Range' of '1 Week'. It lists: # Orders: 12, Unassigned: 6, In Process: 3, Completed: 0, Canceled: 3. Below is a table with 12 records. A red circle '1' is on the 'Scheduled' menu item, a yellow circle '2' is on the 'Filter' search box, and a blue circle '3' is on the first row of the table.

ORDER ID	ORDERED AT	SCHEDULED AT	STATUS	LOCATION
ord.166662	2026-02-03 12:22	2024-07-09 08:00	Canceled	[TEST] Heyman Urgent Care
ord.166670	2026-02-04 16:23	2026-02-05 17:00	Assigned	[TEST] Imrich ER
ord.166673	2026-02-05 10:48	2026-02-06 09:00	Dispatchable	[TEST] Imrich ER



The screenshot shows the 'Order' management interface for order ID 'ord.166673'. It has a status of 'Dispatchable'. The 'Scheduled At' field is set to '02-06-2026 09:00 AM' and is highlighted with a yellow circle '4'. A blue circle '5' is on the 'ASSIGN' button. Other buttons include 'CANCEL ORDER', 'VIEW NOTES', 'VIEW LOG', 'ENCOUNTERS', and 'VIEW TIMECARD'.



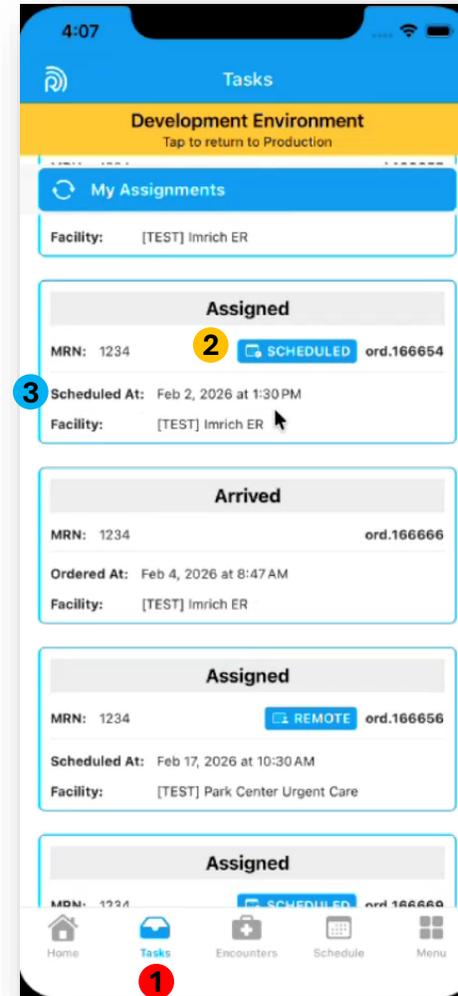
The screenshot shows the 'Assign Order: ord.166673 [Dispatchable]' dialog. It displays the facility as '[TEST] Imrich ER'. The 'Assigned Provider' is 'None Assigned' (highlighted with a green circle '5') and the 'New Assignment' is 'None Selected'. A table lists potential providers with their details.

PROVIDER	PROVIDER PHONE	WORK STATUS	DISTANCE (MI)	DISPATCHED TO	ON SCHEDULE
Griffin Park			588.4	[TEST] Roshal Facility	-
Jonathan Alter	(724) 388-8723	HQ	2508.2	[TEST] Alter Heart Hospital	-
Justin Burdick	(727) 272-8433		729.2	-	-
Nick Imrich	(757) 406-1768	HQ	N/A	[TEST] Imrich ER	-
Roshal Tester			1200.5	[TEST] Roshal Facility	-

Provider App View

4. Provider App View

- 1 • Once notified, the Provider will be able to open their app and under the **Tasks Screen** they will be able to see their **Scheduled Orders**.
- 2 • An order is classified as **Scheduled** if you see the **Blue Scheduled Icon** within the order details.
- 3 • The provider will also be able to see the **Scheduled At** time within their order.





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