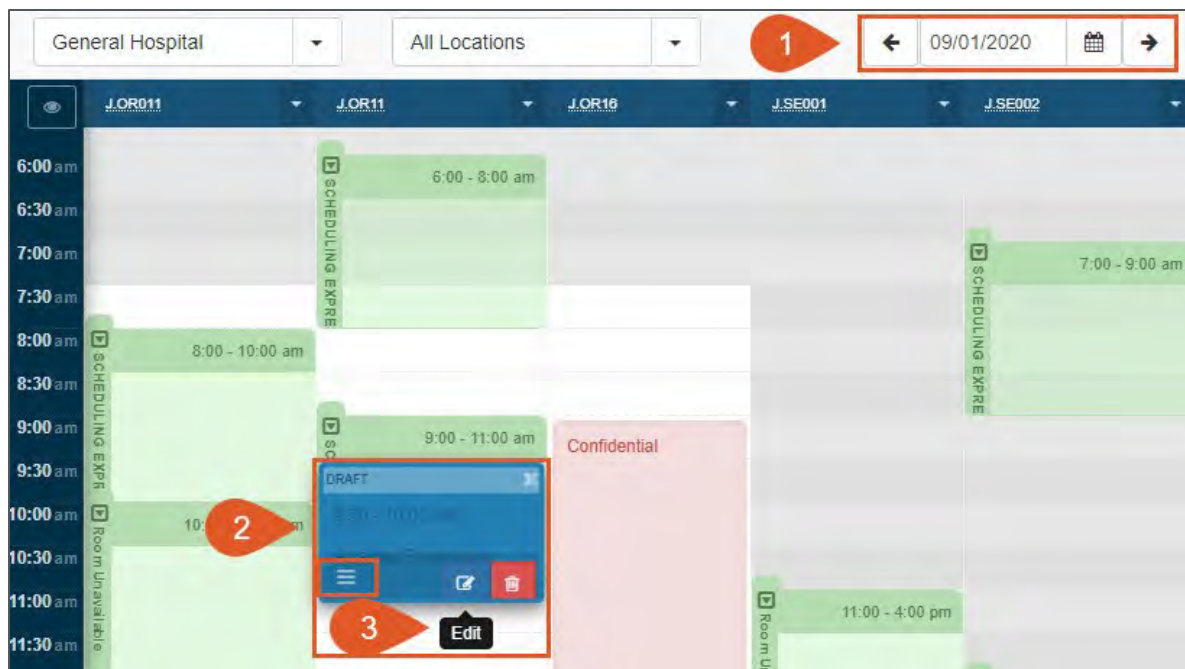
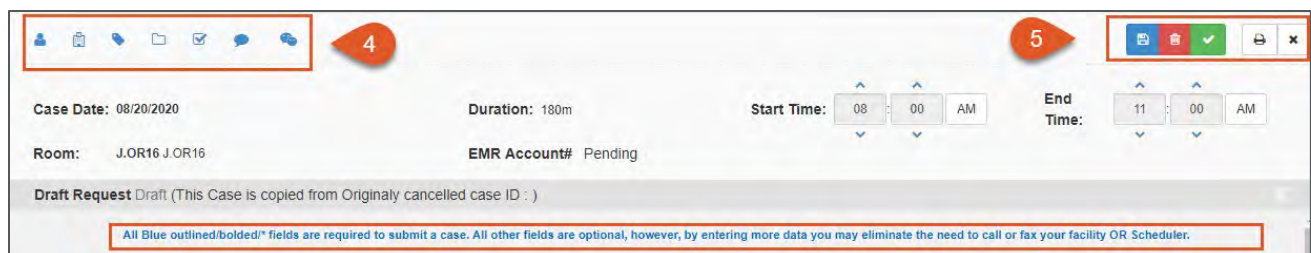


Scheduling Express – Submitting an eRequest for a New Case

1. Choose a **Date** from the calendar.
2. Double click an **open time** on the Schedule View – adjust the duration by clicking and holding on the 3 bars in the lower left corner, and drag the mouse down to the requested stop time.
3. Click **Edit** to open the booking form.



4. The eRequest / Booking form opens. **Required Fields** are highlighted in blue.
 - A. Completing as many fields as possible reduces the need for the OR Scheduler to return the request or call with questions. Navigate to sections of the booking form by using the icons on the left.
5. **Save, delete or submit** by using the buttons on the top right. Save often while completing the form.



6. Complete the following sections:

A. **Patient Details** – Name, Gender, DOB, SSN, Language, Phone/Email.

The screenshot shows the 'Patient Details' form. A red callout bubble labeled 'A' points to the form title. The form contains several input fields: a dropdown for 'Jan', a text field for 'TestCase', a 'Suffix' field, a gender dropdown set to 'Female', a date field for '01/01/1975', a language dropdown set to 'English', a home phone field with '(615) 555-1111', a home address field with '() _-__', and an email field with 'test@email.com'. There is also a '1 checked' dropdown and a 'NA None' button.

B. **Procedure Details** – If you are not certain what procedure to select, select a procedure and then use the comments field to communicate everything the surgeon wishes to do. The OR Scheduler will use your comments to schedule the correct procedure or will contact you for additional clarification.

C. **Attachments and Comments** – Use comments to help clarify anything for the Hospital OR Scheduler to know, for example, special equipment. See **section E** for more on attachments.

The screenshot shows the 'Procedure Details' form. A red callout bubble labeled 'B' points to the form title. The form includes a procedure dropdown set to 'Hip Replacement', a location dropdown set to 'Outpatient/Day Surgery', and a payer dropdown set to 'BCBS'. Below this is a table with three rows of procedure details:

BLACK,JOHN	27125 - PARTIAL HIP REPLACEMENT	JOHN JONES,	Left	Hospital Procedure
BLACK,JOHN	29860 - HIP ARTHROSCOPY DX	Assisting	Left	Hospital Procedure
BLACK,JOHN	CPT	Assisting	Site/Side	Hospital Procedure

Below the table is an anesthesia dropdown set to 'No anesthesia selected...', a 'Click to Add Attachments' link, and a text field for 'Need specific equipment'. A red callout bubble points to a button labeled 'Add Comments - More detail'.

D. **Admission Details, Insurance and Workers Compensation, and Pre-Admission Details.**

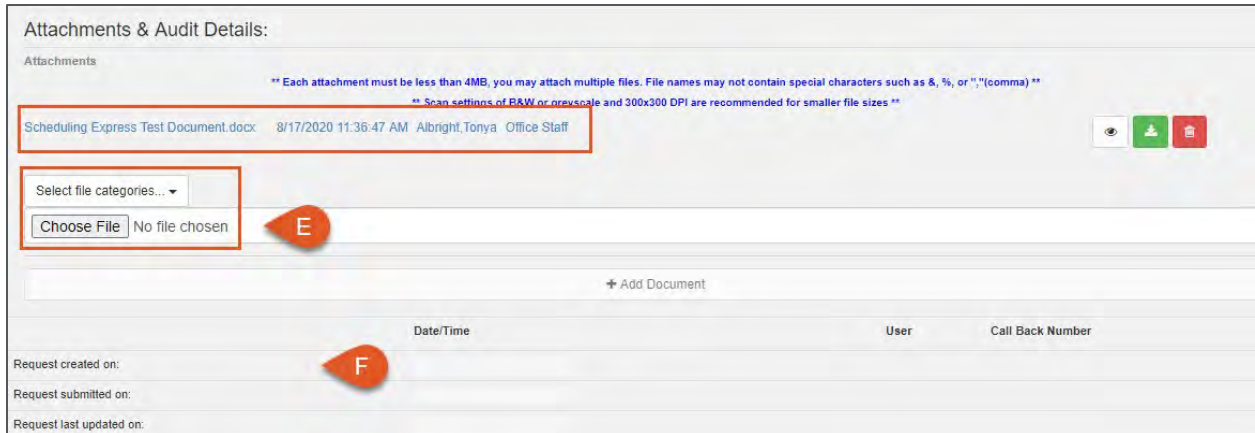
The screenshot shows the 'Admission Details' form. A red callout bubble labeled 'D' points to the form title. The form contains several sections:

- Admission Details:** Includes checkboxes for 'Do you expect the patient to be here two or more midnights?', 'AM Admission?', and 'Patient has Medicare?'. There is a dropdown for 'Physician will fax the orders'.
- Insurance and Workers Compensations Details:** Includes a checkbox for 'Required insurance details are included in attachment.' and expandable sections for 'Primary Insurance', 'Secondary Insurance', and 'Worker's Compensation'. The primary insurance section shows 'BCBS', '12345', '1233', '() _-__', and '11111'.
- Pre-Admission Details:** Includes a checkbox for 'Pre-Admission testing information included in attachment.' and a 'Pre-Admission Details' section with a note: 'Requested Pre-Admission dates/times may not be available, however we will attempt to schedule as close as possible to your requests'. It features two date/time pickers: 'First Date Choice' (08/17/2020, 3:00 PM) and 'Second Date Choice'.

E. **Attachments (PODS sites)** – Select **Choose File** to upload documents from your computer.

i. Attached documents will display the date, time and user name. These can be replaced or removed.

F. **Audit details** display once the form is saved or submitted.



7. Once the booking form is complete, click the **Green Check** to **Submit**

A. Requests can be **Saved** (blue file icon) or **Deleted** (red trash icon).



8. To edit a request that has been submitted or saved, click the **Recall** Icon from the calendar view to return it to draft status. Then click **Edit** to make updates and resubmit.

