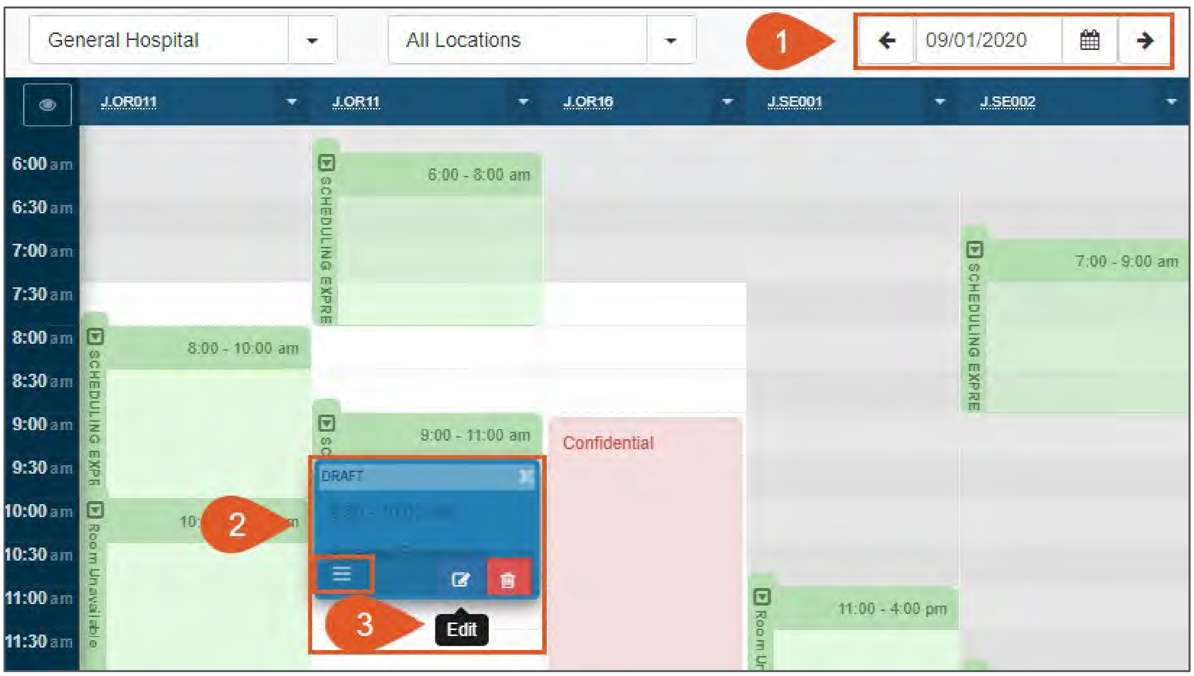
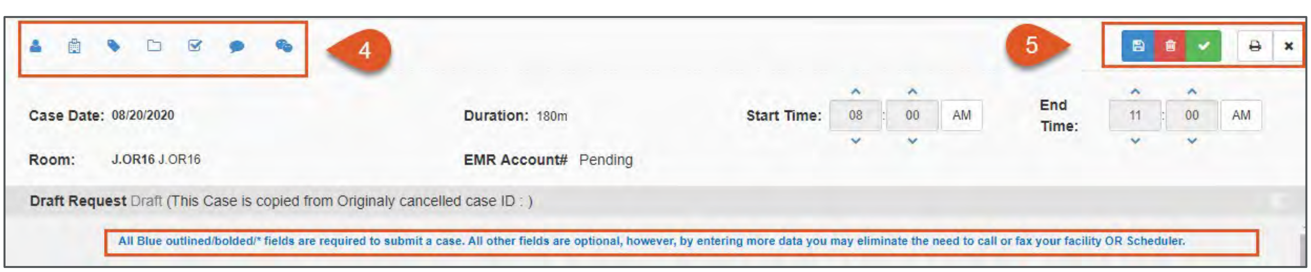
Scheduling Express – Submitting an eRequest for a New Case

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.

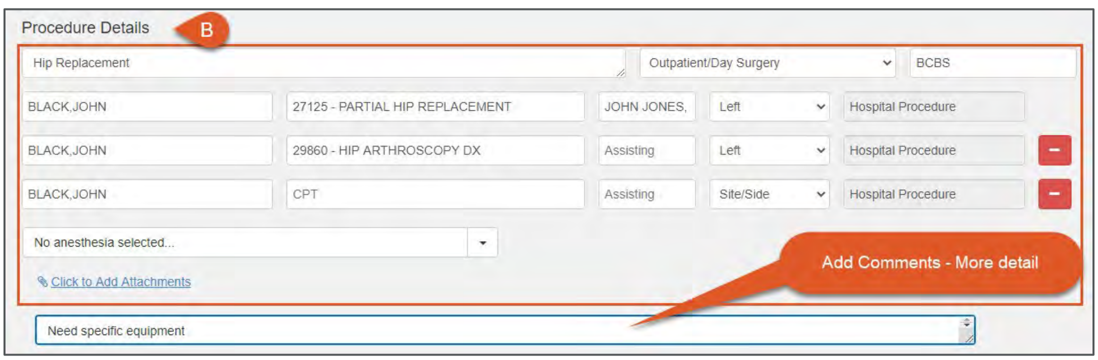


6. Complete the following sections:

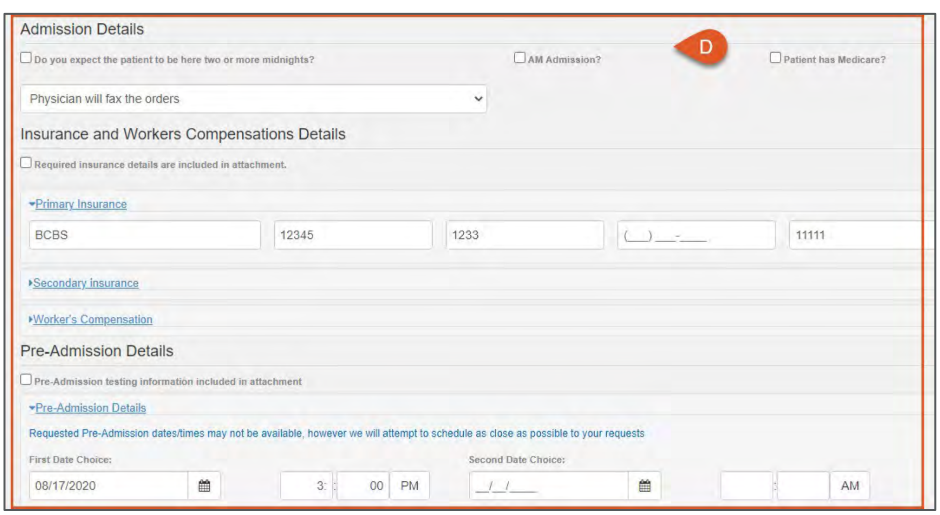
   A. **Patient Details –** Name, Gender, DOB, SSN, Language, Phone/Email.

   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.



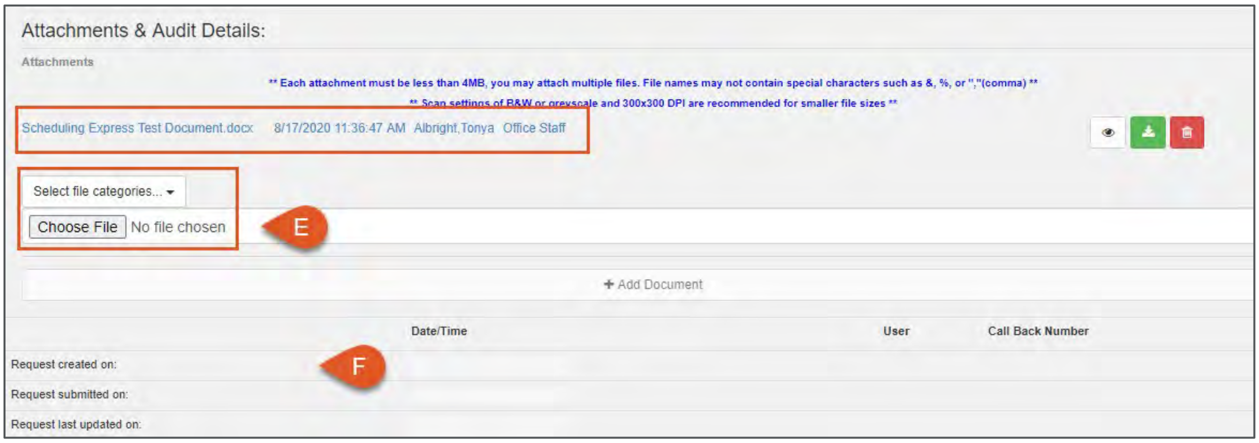
   D. Admission Details, Insurance and Workers Compensation, and **Pre-Admission Details.**



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.