

Scheduling Express - How to Update an Existing eRequest

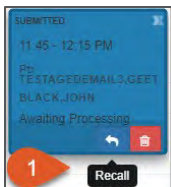
Deleting a Draft Request

1. From the scheduling grid, click on the draft request and select the red **Delete** icon.
2. A message pops up to confirm the deletion. Click **OK**.
 - The request will be removed from the scheduling grid.

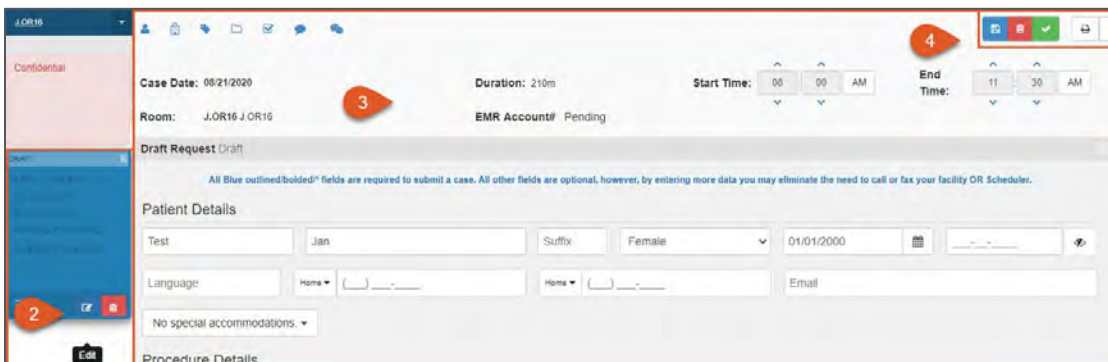


Update a Submitted Request

1. To update a previously submitted eRequest, click the blue **Recall** icon.
 - This removes the request from the facility scheduler's worklist until it is resubmitted.



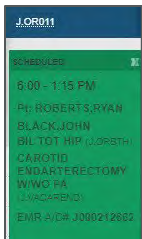
2. Click the blue **Edit** icon.
3. Make changes to the form as needed.
4. Click the **green check box** icon to **resubmit** the request or the red **delete** icon if the request is no longer needed.



Additional Actions

Surgeon Office users can edit a submitted request in order to update/reschedule, cancel, transfer, Swap (re-sequence), or attach documents (for sites using PODS).

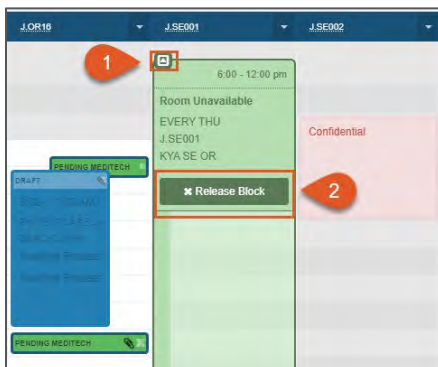
1. Double-click a **scheduled case** on the scheduling grid.



2. Select the appropriate action, make updates, and then click the submit icon.

Release a Block

1. To send a request to release a block of time that a physician or group has reserved, hover the mouse cursor over the reserved block of time on the scheduling grid and a **Release** button will appear.
2. Click **Release** and follow the associated instructions.

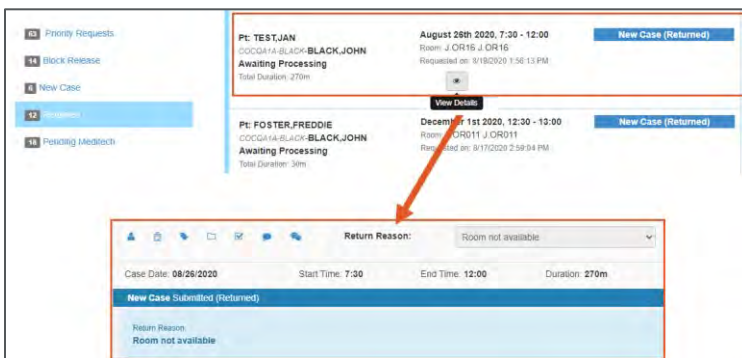


Hospital OR Scheduler eRequest Actions

When an edited request is submitted to the hospital scheduler, they will do one of the following:

Return

- If the hospital scheduler needs more information, they may contact the office or return the request
 - If returned, it will appear on the **Schedule** and **Worklist** tab as **Returned**. The reason will display on the case header. An email is also sent when returned.
 - Click **Recall** to open the request, **update** as needed, and then **resubmit** the request. *Optional:* Open a chat with the OR Scheduler if clarifying information is needed.



In Review

- If the hospital scheduler is reviewing the request, the request will appear on the worklist tab in yellow as **In-Review**.



Confirm/Book

- Once the hospital scheduler decides a request can be fulfilled, they update the Meditech schedule and click **Pending Meditech** in Scheduling Express. The request status will change to **Pending Meditech** on the schedule view.
- Once processing is complete in Meditech, the request reads **Scheduled** and an email confirmation is sent.

