



Optime – In Basket Change Request

Office Scheduler

Intended Audience: Office Scheduler

Summary: The Office Scheduler will no longer request changes to the case entry form. Instead, use the Case Msg button from the case entry screen to Case Message and In Basket

Case Message

Case 977 - 167 minutes (Scheduled)						
Schedule 🔎 Open Times 🔛 Case Actions 🔻 🖾 Auth/Cert 🛊 Patient 👻 Case Msg						
General Information	General Info					
Questions Instructions	Date:		11/9/2022			

Recipient

- In the Case Message, begin by searching for the pool to send the message to. Surgery scheduling uses two specific pools: GR Surgical Amendment and Regional Surgical Amendment
 - Click the magnifying glass in the **TO** field to open the **Recipients** screen.
 - In the **Pool** field search for the name of the pool for your location. Click the magnifying glass (or hit **Enter**).

٢		•	GR Surgical Amendment (Blodgett, Butterworth, Helen Devos, Lake Drive, Meijer Heart, South Pavilion) Regional Surgical Amendment (Big Rapids, Grand Haven, Gerber, Ludington, Pennock, Reed City, Greenville, Zeeland)
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- Select the correct pool then click 'Add To' to add the pool name in the *To* field of the message.
- Note You will know you have chosen a pool when there is a P in front of the group name in the *To* field of the message.





In Basket Recipients					×	
Individual Recipients		Search Results				
	ò	% Registry Name				
Pools or surgic	0	GR SURGICAL AMENDMENT			Case Mes	ssade
Classes	~	GRAND RAPIDS SURGICAL SU	ITES POOL			
	P	I GI GR 14 SURGICAL SCHEDUL	ING			
		REFERRALS SURGICAL ONCO	LOGY GR		-	
		REFERRALS SURGICAL RESID	ENCY CLINIC GR			
					PCP	
					_	
To Recipients		Add 'T₂' Add 'Cc' Add 'Cc'	Cc Recipients		To: P GR S	SURGICAL AMENDMENT ×
P GR SURGICAL AMENDM	ENT	107000000				
					Subject	
- Remove 'To'			- Remove 'Cc'			
				He Restore	Accept X Cancel	

Case ID and Patient

The Case ID and Patient fields will automatically populate with the information from the case.

Case Action

In the Case Action field choose **Case Amendment Request** from the drop-down list (magnifying glass). Add a general subject in the **Subject** field *i.e.:* case change/date change/location change.

Refrain from placing important case details in the Subject field.

To: P GR SURGICAL AMENDI	MENT ×	O Cc	
Case change			
Case ID	Case Action		t High ↓ Low
	Case Amendment Request	0	

- To the right of the To field is the option to set the priority of each message. Please use High priority for next day changes ONLY.
- For <u>Late Next Day</u> and <u>Same Day</u> changes please ALSO contact the OR directly in additon to submitting an InBasket message.
- Messages received after 5pm will not be submitted until the next business day.

Using SmartTexts

- The body of the message will be completed with a SmartText named SH OR SURGICAL CASE AMENDMENT.
 - In the **Insert SmartText** field, click the clolorful incon on the right to open up the SmartText Lookup window. In the search box type **SH OR SURG** and press **ENTER**.
 - To save yourself time in the future, click the star next to the SmartText in the Matches column to save it as a favorite. This will allow you to quickly access the SmartText every time you come to this screen.

ē	
sh or surg	
Matches	
★ SH OR SURGICAL CASE AMENDMENT REQ	U
sh or surg Matches	U

- Click **Accept** and the SmartText will be added to your message.
- Click in the message so your cursor is at the end of the "AMENDMENT REASON:" Enter in the reason.



- Next click the down arrow in the pink AMENDMENT REASON box. SmartLists are lists of common choices that will help you quickly customize your message.
 - SmartLists without background are single change options. SmartLists with a white background have multiple options that will populate in the message when selected.

AMENDMENT REASON:	
AMENDMENT REASON -	
	IT
Location Change: ***	
Request Submitted by: Ang 🔲 🖶 ADMITTING AMENDMENT	
Date: 11/4/2022 Tim 🔲 着 DIAGNOSIS AMENDMENT	
G PROCEDURE AMENDMENT	
🔲 🖶 CASE STATUS AMENDMEN	Т
EQUIPMENT/INSTRUMENT/IMP	LANT AMENDMENT: ***
OTHER SCHEDULING REQUES	T AMENDMENT: ***

- Click the boxes of all changes being made, and press ENTER.
- In the following example DATE, CASE STATUS, EQUIPMENT and OTHER have been chosen



- Notice the drop-down options for Date, Case Classification and Case Status click to add more specific information regarding each. Utilize the wildcard option (***) by clicking to free text additional information.
- Once all fields in the SmartText are complete, click Accept to send the message and BE SURE TO CLOSE THE CASE to facilitate submission of the change request.
- SPECIAL NOTE: Case Status Amendment has three often used options:



CANCEL = Delete case forever REMOVE = Put case back in Depot DATE CHANGE = Change the Date of the Case and keep current

Corewell Health