

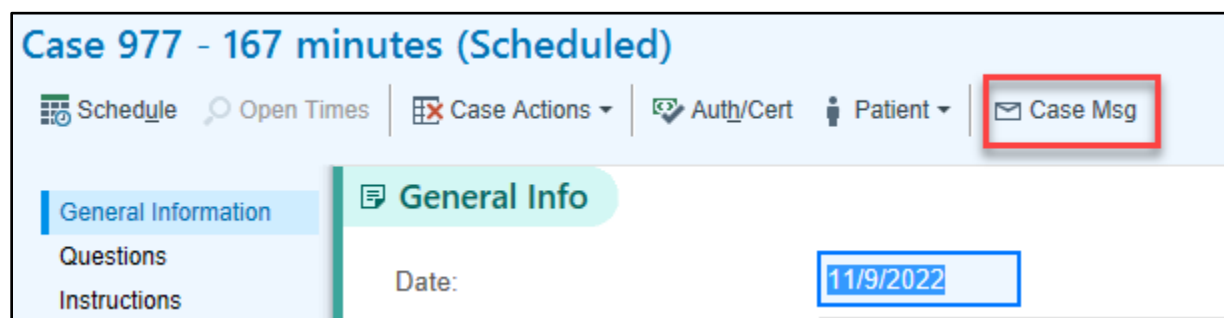
# Optime – In Basket Change Request

## 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



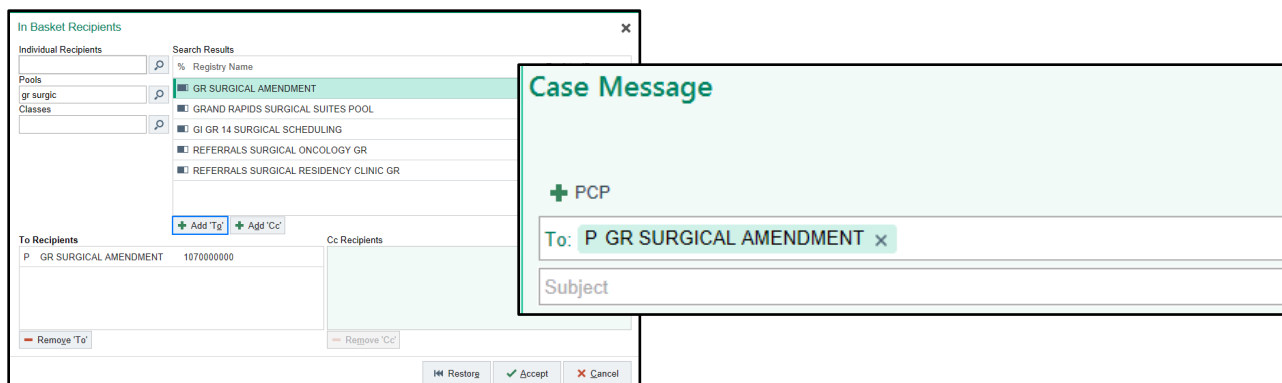
### Recipient

- 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**).

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- 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)

- 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.



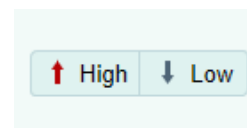
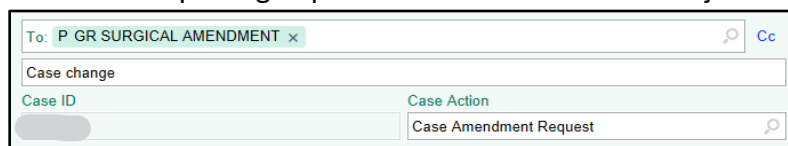
## Case ID and Patient

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*.

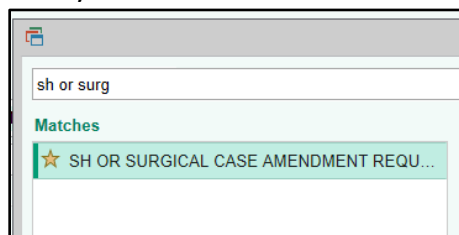
- Refrain from placing important case details in the Subject field.



- To 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 Late Next Day and Same Day changes please ALSO contact the OR directly in addition 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 colorful icon 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.



- 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.

- 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