

Book a surgical procedure

Last Modified on 08/09/2022 3:58 pm AEST

Book an appointment for a surgical procedure. This includes setting up the Operations List - a report that provides information about the operation for the hospital and surgeon. We will also look at how to check all surgical procedures.

Before you can book a surgical procedure, the Appointment Type and Operations List must be set up in Zedmed. To learn more, see the [Create Appointment Type article](#).

Book a surgical procedure

To book a surgical procedure:

1. Go to Zedmed's **Reception** tab.
2. Select **Appointments**.

The **Appointments Display Grid** screen will open. If the screen was already open, select **Refresh**.

3. Right-click the appointment's time slot and select **Add (Patient)**.

The **Patient Search** screen will open.

4. Search for the patient and select them.

The **Appointment Details** screen will open.

To learn about searching, see the [find a patient's record article](#).

5. Fill in the relevant appointment details:

- In the **Type** field, select **Surgical Procedure**.

The **Create** and **Select** buttons will appear.

- Enter a **Duration** for the operation. The **End Time** will update.
- Use the **Notes** section to record information relevant to the booking.
- Any **Referrals** will appear on the right side.
- The space by **Alerts** shows information from the Alerts section of the patient's record. For example, it could note that the patient needs to pay in advance or that they have missed past appointments.
- The operator's code and booking time are recorded and shown on the **Booking** screen.

6. Select **Create**.

Appointments Display Grid

Appointment Search View Refresh Waiting Room Patient Bill Encounters Ref Drs Close Extra Surgical Procedures

Search Next Avail. Waiting Room Branch 1 <All Doctors> Branch Doctor Resource Friday 23/07/2021 Day

	Hatcher,Danni	HEDRICK,WARREN	Davis,Phillip	Smith,John	Nurse
9 AM	0	0	0	0	0
10 AM	0	0	0	0	0
11 AM	0	0	0	0	0
12 PM	0	0	0	0	0
1 PM	0	0	0	0	0
2 PM	0	0	0	0	0
3 PM	0	0	0	0	0

Appointment Details

Date: **Friday, 23 July 2021** Created by PD **Hollaway, Knut** ✔
 Doctor: **WARREN HEDRICK** on 23/07/21 at 09:30
 Resource: **WARREN HEDRICK** File No: 4 Pull File: Yes DOB: 19/05/1995 Type:
 Start Time: 11:30 Clinic: Branch 1 First in: 17/03/2021 Last in: 21/07/2021
 Duration: 01:00 Status: Current
 End Time: 12:30 Type: **Surgical Procedure**
 Surgical Procedure Create Select

Notes

Reason for chosen date:
 Cancellation Waiting Priority: High
 Hide Notes: ☐ Allow SMS: ☒

Account Payers

Payer	Type	Amount
Hollaway, Knut	P1	\$2,073.25
Medicare	MC	\$326.65
Springs	MC	\$0.00
Church, Lawrence	P1	\$0.00

Repeated booking: ☐

Print Label Booking rules Print Letter Find Patient Print Slip

Close Cancel Help

Other Details

Expiry MC HCC

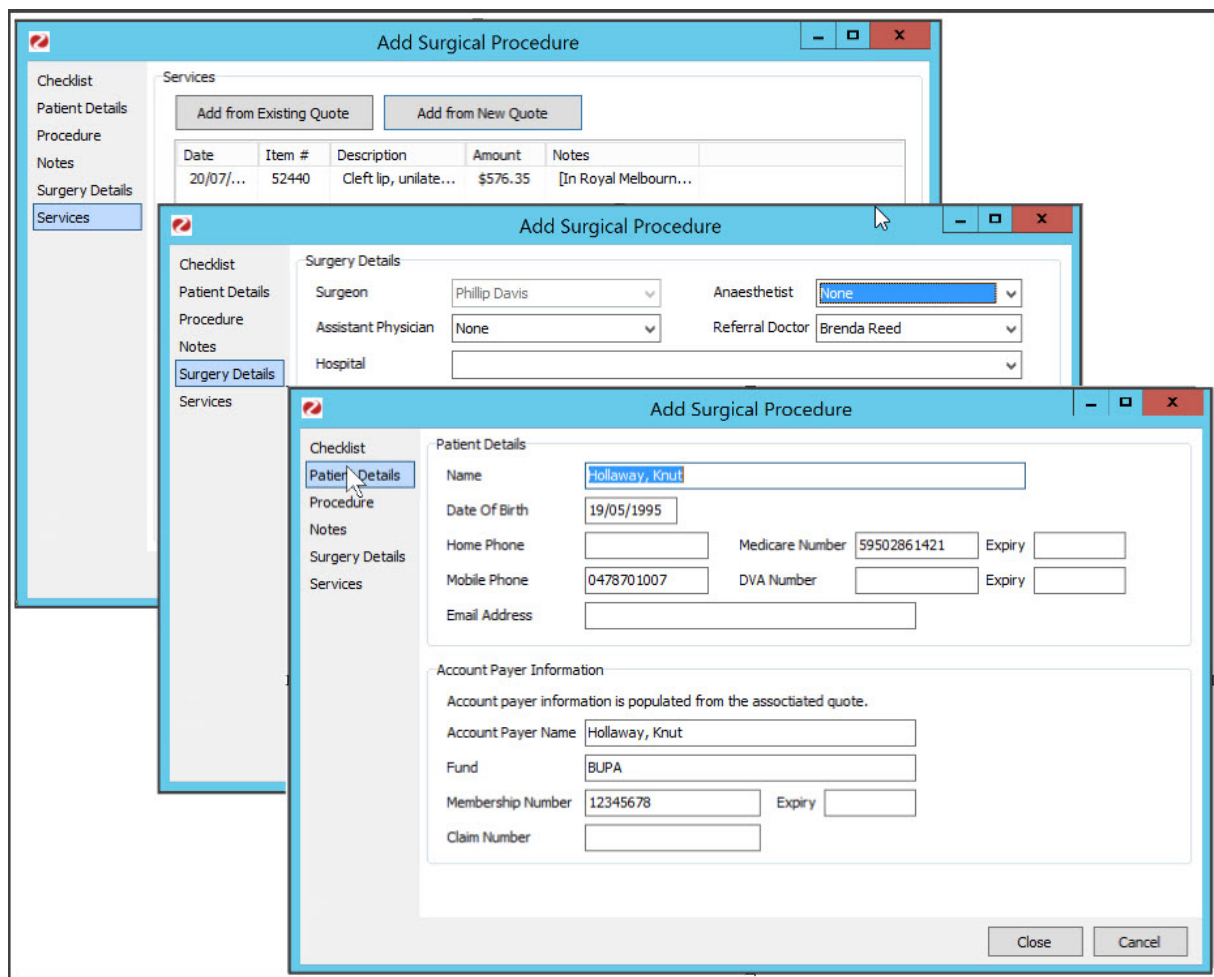
Referral To Dr Phillip Davis
 By Dr Pete Steven
 On 12/07/2021 for 999 months

Alerts **test**

Clinical Warnings

The **Add Surgical Procedure** screen will open.

The tabs on this screen are used to select items for the Operations List, a report that provides information about the procedure for the hospital and the surgeon.



7. Select the **Checklist** tab:

- Select the items you want to be included in the Operations List.

8. Select the **Patient Details** tab:

- The patient's information is taken from the patient's record.
- To populate the **Account Payer Information** section, you need to create a quote as shown in step 12.

9. Select the **Procedure** tab:

- For **Type**, select the surgical procedure.
- Fill in any fields relevant to the procedure.
- Under **Instruments**, select each item then the + icon to include that item in the Operations List.

To learn about setting up types and instruments, see the [Set up a surgical Appointment Type article](#).

10. Select the **Notes** tab:

- Enter anything you want to be added to the Operations List.

11. Select the **Surgery Details** tab:

- Use the **Anesthetist**, **Referral Doctor** and **Assistant Physician** fields to make selections relevant to the procedure. The names come from the address book.
- Select the hospital.
- Review and fill in the admission and surgery fields.

12. Select **Services**:

- Select **Add from New Quote**.

The **Quotation** screen will open. Fill in the **Services** section.

- b. In the **Date** field, select the surgery date.
- c. In the **Item** field, enter the procedure's item code.
- d. Press **Tab**.
- e. If you're charging a health fund, select the patient's fund in the **Fee** field.
- f. Select **Properties**, select the **Hospital/Site**, then select **OK**.

Check that the hospital now shows in the **Notes** field for the service.

- g. Select **Suppress**.

13. Select **Yes** to confirm.

You will return to the **Add Surgical Procedure** screen.

The **Services** tab will now show the quote, and the **Patient Details** tab will show the **Account Payer Information**.

14. Select **Close** to save and Exit.
15. Select **Close** on the **Appointment Details** screen.

The Surgical Procedure List

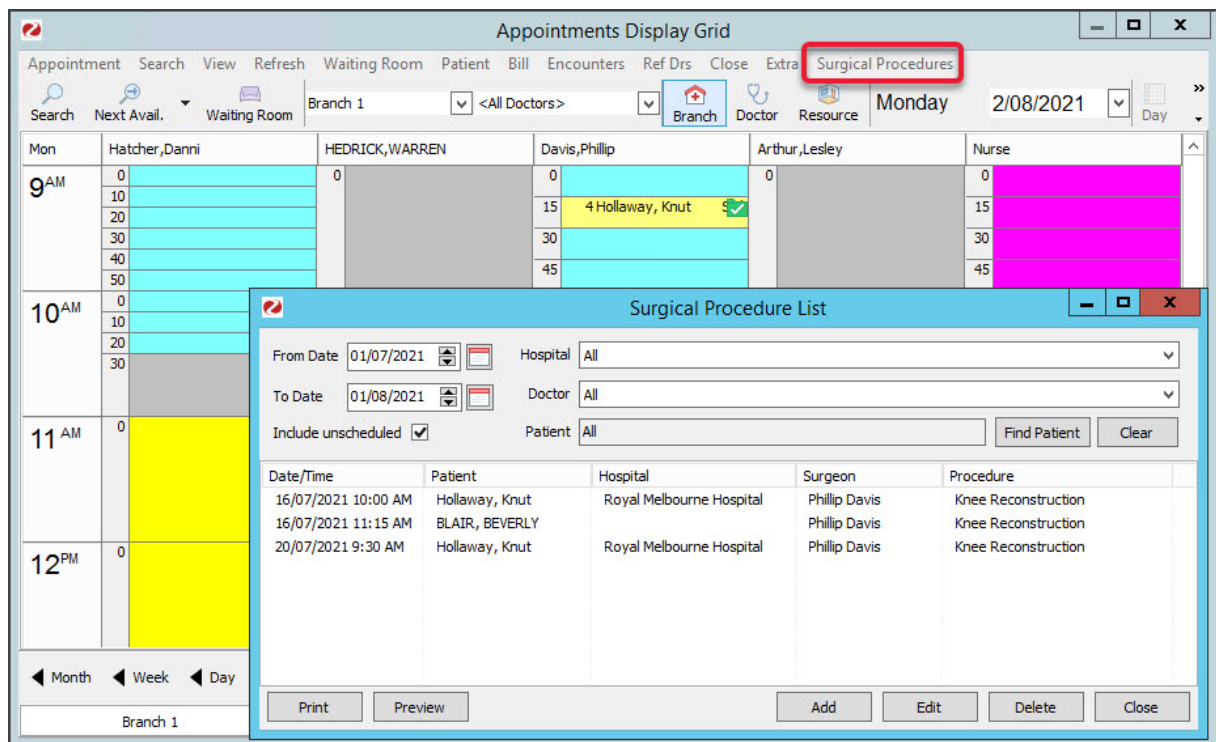
Zedmed allows you to view and manage all surgical bookings using the **Surgical Procedure List**. This screen makes it easy to look up surgeries, view and print an appointment's Operations List and create quotes.

To open the Surgical Procedure List:

1. Go to Zedmed's **Reception** tab.
2. Select **Appointments**.

The **Appointments Display Grid** screen will open. If the screen was already open, select **Refresh**.

3. On the top menu, select **Surgical Procedures**.



Surgical Procedure List activities

You can use the Surgical Procedure list to:

1. **Filter the results** - by changing the **From Date** and **To Date** range and using the **Hospital**, **Doctor** and **Patient** fields.
2. **View an Operations List** - by selecting a patient then **Screen**. The report has **Print** and **Export to PDF** menu options.
3. **Print an Operations List** - by selecting an appointment then **Print**.
4. **Open the Surgical Procedure screen** - by selecting an appointment then selecting **Edit**.
5. **Add a quote for a procedure** - by selecting a patient and selecting **Edit** > **Services** tab > **Add for New Quote**.
6. **Add a new Operations list** - by selecting **Add**. We recommend adding an Operations List when **booking the appointment**.

The Operations List












Provides information about the operation for the surgeon. The information can include the surgical instruments required and the patient's approvals. The list is sent to the hospital so the staff there has all the information they need about a booking.

The Operation List is an option for all appointments created using the **Surgical Procedure - Appointment Type**. You can select what to include using the **Add Surgical Procedure** screen, which opens when you select **Create** on the **Appointment Details** screen. This process is explained in the **first section of this article**.

To print out the Operations List

1. Open the **Appointment Book**.
2. Select **Surgical Procedures** from the top menu.
3. Select the applicable date range.
4. Select the patient/procedure from the list.

5. Select **Print**, or **Preview** to open the list then select **Print**.



1 of 3

Close

Branch 1

Page 1

Surgical Procedure Booking Information

OT Start Time: 11:15 AM Date: 16/07/2021 Surgeon: Phillip Davis Anaesthetist:

Op List Order	Op Time	Consent Attached (Y/N)	Patient Details	Insurance Details	Procedure Details	Other Details
1	11:15 AM	N	BLAIR, BEVERLY DOB: 21/11/1999 11 Joachim Cct PENNANT HILLS 2120 Home Phone: 03 125 12541 Mobile: 0412012100 Medicare: 29508906313		Knee Reconstruction Admission Date & Time: 16/07/2021 9:11 AM Day Surgery	

Page 1 of 3