Surgical bookings

Version: 1.01 | Last Modified on 05/12/2025 3:19 pm AEDT

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.
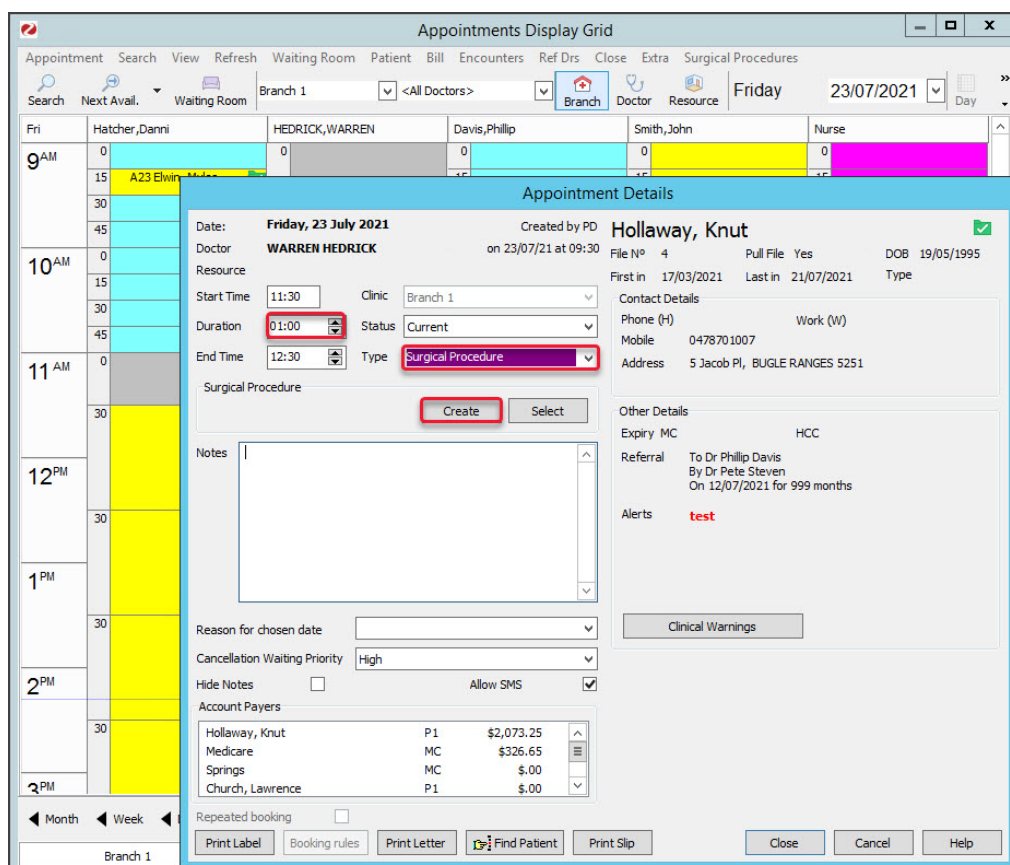
Book a surgical procedure

To book a surgical procedure:

1. Go to Zedmed's **Reception** tab.
2. Select **Appointments**.
3. Right-click the appointment's time slot and select **Add (Patient)**.
4. Search for the patient and select them.

   The **Appointment Details** screen will open.
5. In the **Type** field, select **Surgical Procedure.**

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

6. Select **Create**.

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

The tabs (Checklist through to Services) are used to add items for the Operations List.

The **Operations List** is a report with information about the procedure for the hospital and surgeon.

Fill in the applicable **Add Surgical Procedure** screens, which are explained below.

The Add Surgical Procedure screens

7. **Checklist** tab:
    - Select the items you want to be included in the Operations List.
8. **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:**
    a. 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.
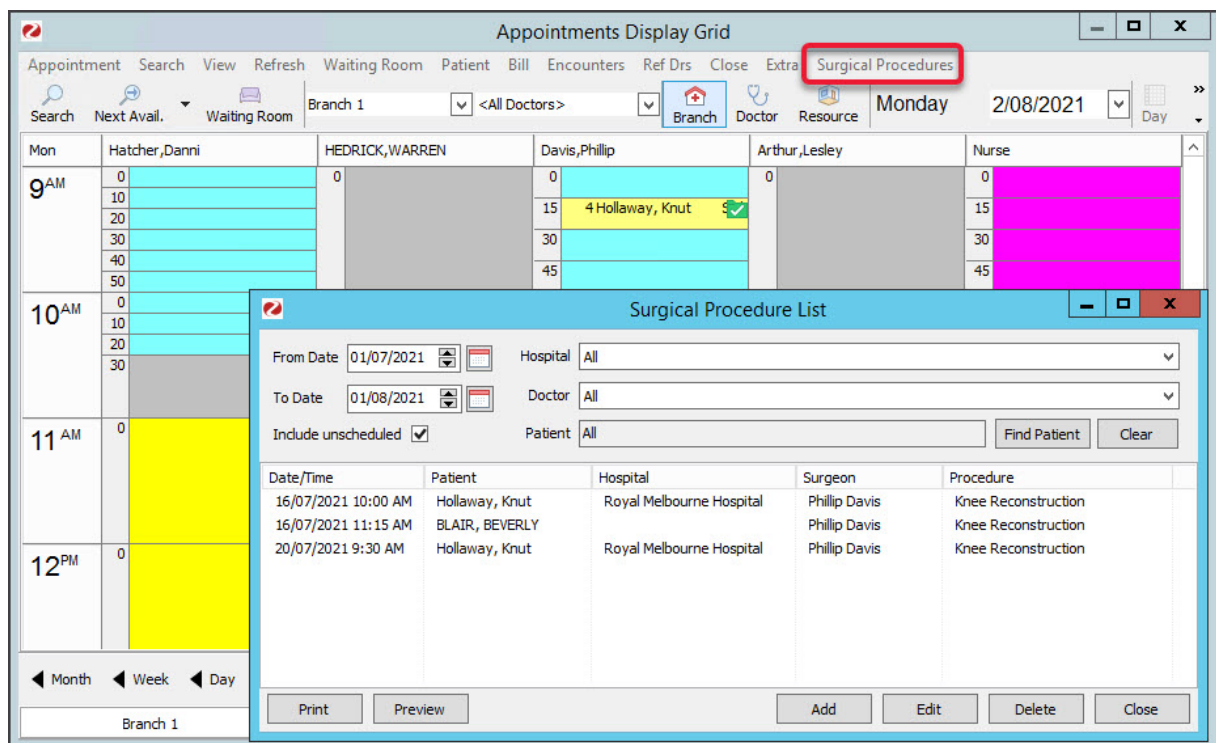
The Surgical Procedure List

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.