

Surgical bookings

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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

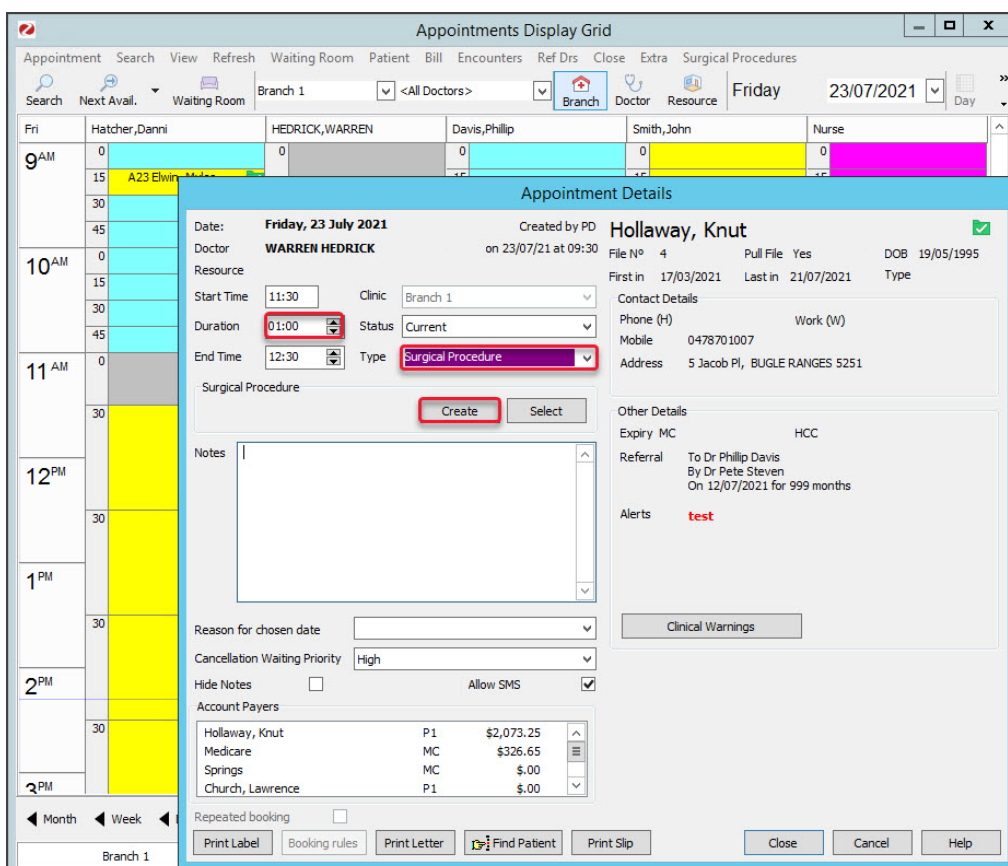
To book a surgical procedure:

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.



The screenshot shows the 'Appointments Display Grid' interface. A modal window titled 'Appointment Details' is open over a 10:30 AM slot. The appointment is for 'WARREN HEDRICK' on 'Friday, 23 July 2021'. The 'Type' dropdown is set to 'Surgical Procedure', and the 'Duration' is '01:00'. The 'Create' and 'Select' buttons are visible below the 'Surgical Procedure' field. The patient details for 'Hollaway, Knut' are shown, including contact information and account payers.

Date:	Friday, 23 July 2021	Created by PD	Hollaway, Knut												
Doctor:	WARREN HEDRICK	on 23/07/21 at 09:30	File No 4 Pull File Yes DOB 19/05/1995												
Resource:			First in 17/03/2021 Last in 21/07/2021 Type												
Start Time:	11:30	Clinic:	Branch 1												
Duration:	01:00	Status:	Current												
End Time:	12:30	Type:	Surgical Procedure												
Surgical Procedure		<input type="button" value="Create"/> <input type="button" value="Select"/>													
Notes															
Reason for chosen date															
Cancellation Waiting Priority		High													
Hide Notes		<input type="checkbox"/>													
Account Payers		<table border="1"> <tr> <td>Hollaway, Knut</td> <td>P1</td> <td>\$2,073.25</td> </tr> <tr> <td>Medicare</td> <td>MC</td> <td>\$326.65</td> </tr> <tr> <td>Springs</td> <td>MC</td> <td>\$.00</td> </tr> <tr> <td>Church, Lawrence</td> <td>P1</td> <td>\$.00</td> </tr> </table>		Hollaway, Knut	P1	\$2,073.25	Medicare	MC	\$326.65	Springs	MC	\$.00	Church, Lawrence	P1	\$.00
Hollaway, Knut	P1	\$2,073.25													
Medicare	MC	\$326.65													
Springs	MC	\$.00													
Church, Lawrence	P1	\$.00													
Repeated booking		<input type="checkbox"/>													
Print Label		<input type="button" value="Booking rules"/> <input type="button" value="Print Letter"/> <input type="button" value="Find Patient"/> <input type="button" value="Print Slip"/>													
		<input type="button" value="Close"/> <input type="button" value="Cancel"/> <input type="button" value="Help"/>													

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 image displays three overlapping screenshots of the 'Add Surgical Procedure' software interface. The top screenshot shows the 'Services' tab with a table of items. The middle screenshot shows the 'Surgery Details' tab with fields for Surgeon, Anaesthetist, Assistant Physician, Referral Doctor, and Hospital. The bottom screenshot shows the 'Patient Details' tab with fields for Name, Date of Birth, Home Phone, Mobile Phone, Email Address, Medicare Number, DVA Number, and Account Payer Information.

Add Surgical Procedure screens

7. Checklist tab:

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

8. Patient Details tab:

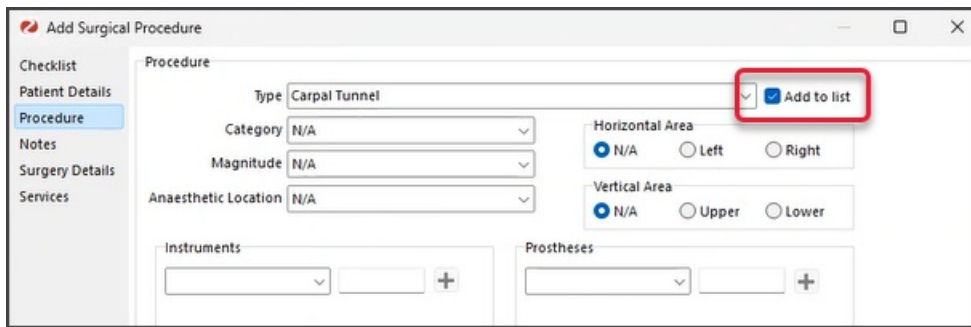
- The patient's information is taken from the patient's record.
- To populate the **Account Payer Information** section, you need to create a quote, as shown in step 12.

9. Select the Procedure tab:

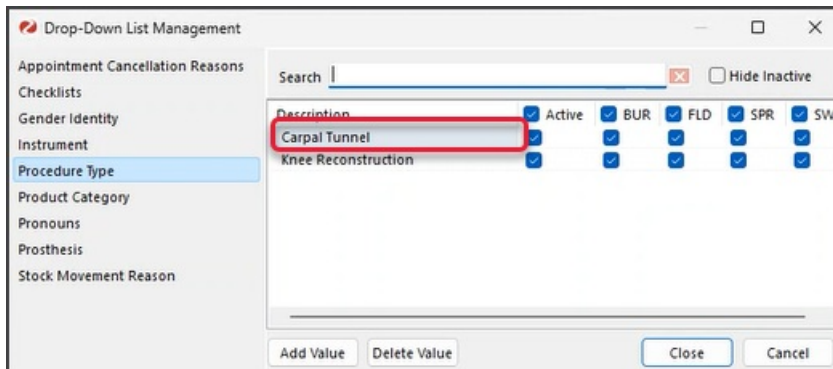
- For **Type**, select the surgical procedure.
- Fill in any fields relevant to the procedure.
- Under **Instruments**, select each item then the + icon to include that item in the Operations List
- To learn about setting up types and instruments, see the [Set up a surgical Appointment Type article](#).

Free text option

A Surgical Procedure 'Type' can be changed using free text. The new text can be a one-off update or added for use with other surgical procedures by selecting the "Add to list" option.



The new Procedure 'Type' is saved when you use **Add to list**.



10. Select the **Notes** tab:
 - o Enter anything you want to be added to the Operations List.
11. Select the **Surgery Details** tab:
 - o Use the **Anesthetist, Referral Doctor and Assistant Physician** fields to make selections relevant to the procedure.
 - o The names come from the address book.
 - o Select the hospital.
 - o 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.

Quotation

Invoice

Patient: Mr Knut Hollaway DVA HCC# Safety Pens. Status None
 File 4 DOB 19/05/1995 (26)

Payer: Hollaway, Knut Add/Edit Payer Payer Debts: Patient 2073.25, Family 2073.25, Credit 0.00
 Applicable Fee Type P1 Deferred 0.00, 0.00

Doctor: HEDRICK, WARREN A

Request/Referral Dr: Dr Pete Steven To: PD Starts: 12/07/2021 Mths: Indef Notes: Fund Details: Fund BUPA # 12345678 Fund Fee Type IF7

Claim: Refund/Gap Calculation: Fund Medicare Invoice Style: Print Gap Corporate

Services

Date	Item#	Description	Fee	Tax	Unit Value	Qty	Amount	Notes	Estim. Refund	Gap
28/07/2021	52440	Cleft lip, unilateral - primary repair,	P1	FRE	576.35	1	576.35		478.80	97.55

Assist Fee Properties Add Change Delete Total 0.00 Disc. 0.00 Gap 0.00

Doctor Assigned Billing Codes Message Add All

Billing Instructions

Combo Inv. Print Email Suppress Cancel Help

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

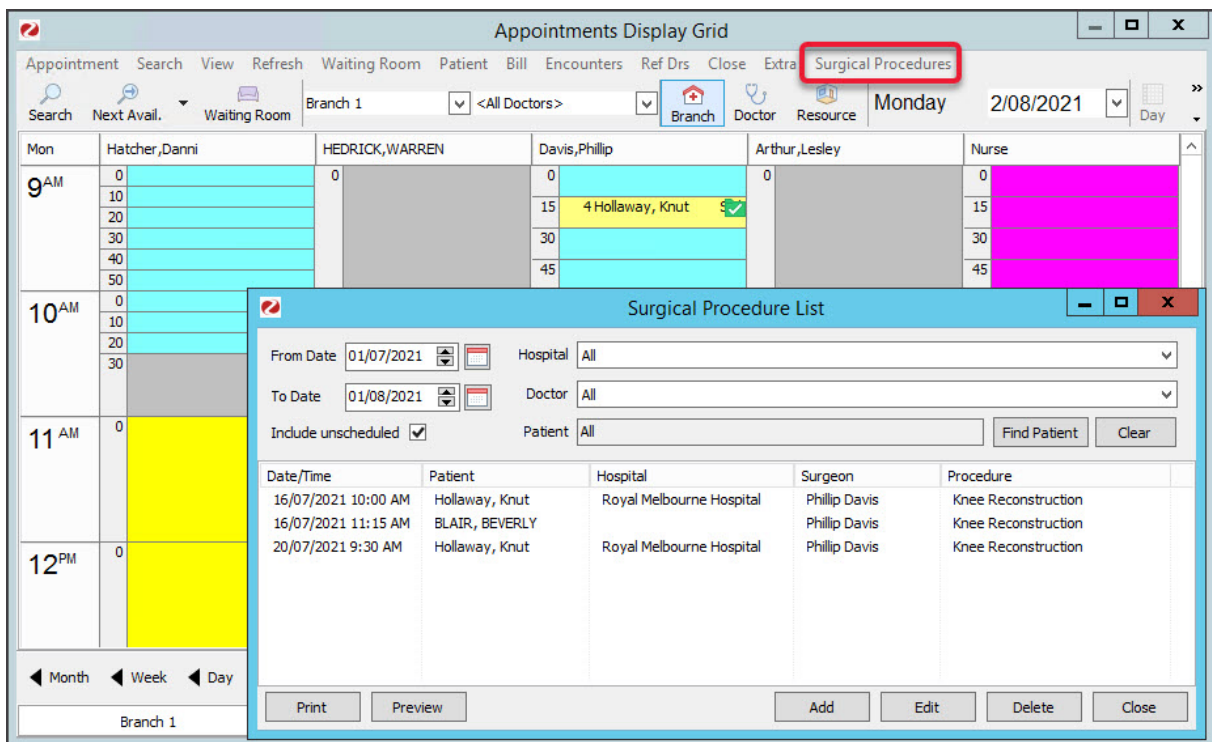
Zedmed allows you to view and manage surgical bookings using the **Surgical Procedure List**. This screen makes it easy to look up surgeries, view and print an appointment's Operations List and create quotes.

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.

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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	

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