help.surgerease.com
support@surgerease.com

Start Here: Settings > My Care Team > Surgeon Team Settings

Surgeon Team Settings:
The Surgeon Team Settings is where you add your care team members, surgical locations, patient documents, patient reminders, and checklist. Information from your Surgeon Team Settings is automatically inserted into your cases, streamlining the surgery scheduling and case management processes.

Care Team / Care Team Groups:
Add your care team members to keep everyone informed of case details and notified of case changes in real time. Include everyone that would benefit from following your surgical cases: First Assist, Anesthesia, Billing, Reps or Vendors, Case Managers, Facilities, PA, Nurse, etc. Control access by assigning an Admin permission (can add and edit cases on your behalf) or Member permission (can only view cases assigned to them). Group care team members by procedure, location, billing, etc. to save time inviting your team to a case.

Locations:
Enter the name and address of each of your surgical locations once, and then simply select from this list when creating a case.

Procedures / CPT Codes / ICD-10 Codes:
SurgerEase provides the American Medical Association's standard procedures with corresponding CPT Codes to select from when creating a case. Optionally, SurgerEase provides a means for you to create your own custom procedures and codes. You will find these functions in these three tabs.

Checklist
Preset specific tasks as reminders for your team to complete while the case is in Pending (Pre-Op), Scheduled and Post-Op status. The team can easily see which tasks have been completed and which are still required before and after surgery. Ex: Collect Co-Pay, Attach Labs, Schedule Follow Up Appointment.

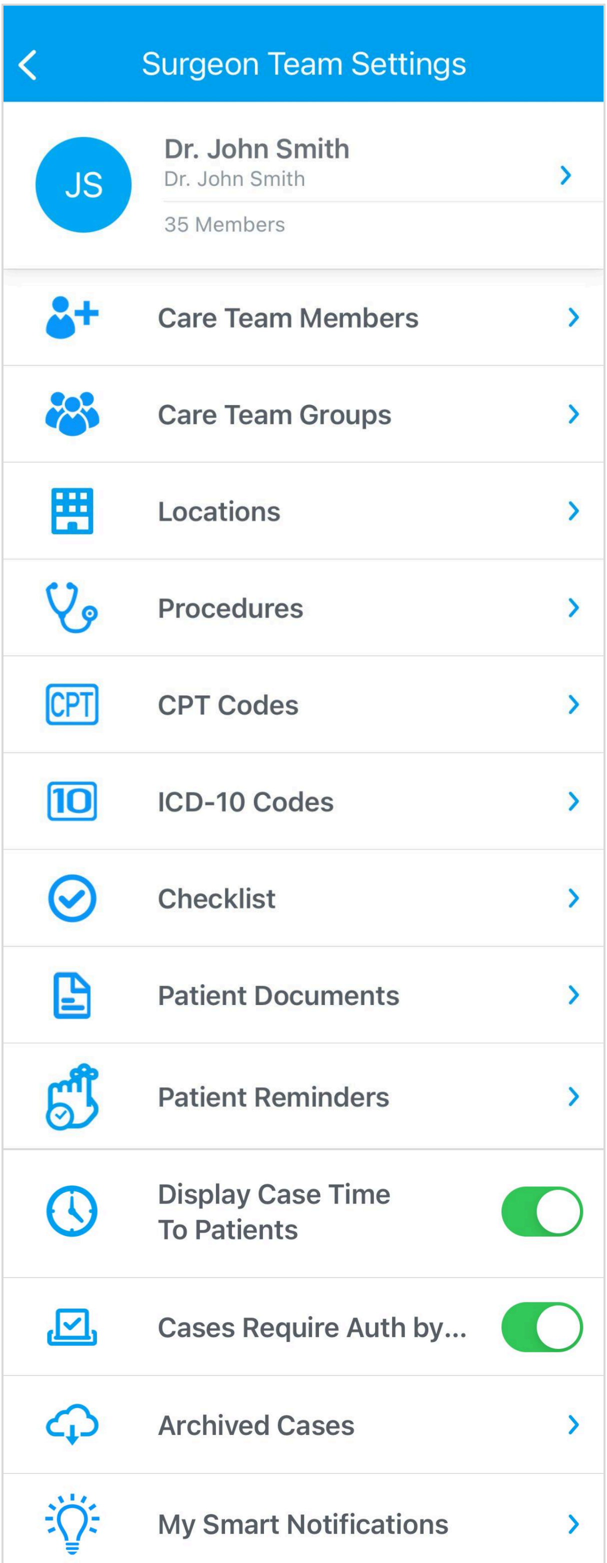
Patient Documents:
Automate delivery of your patient documents, such as HIPPA, privacy, pre and post op instructions, etc. Upload your PDF from our application or simply email PDF documents to the unique SurgerEase email shown in this tab to load them into your settings. Available Documents list all documents available to be emailed to your patient. Move documents into the After Scheduling area to have them sent once your case is scheduled.

Patient Reminders:

Set up patient reminders via text that trigger at specific times and days before and after surgery. No longer do you have to call patients to remind them to stop eating, arrange transportation, or take medication.

help.surgerease.com
support@surgerease.com

Surgeon Team Settings Defined



Information entered in your Surgeon Team Settings is automatically prepared in your cases, streamlining the surgery scheduling process.

Add or Edit your Surgeon's information here.

Add (Invite) and Edit your team members here.

Create care team groups here: makes it easier to invite a team when they are grouped by location or procedure.

Add or Edit your Surgery Locations here.

Add or Edit your Procedures here. (Optional)

Add or Edit your CPT Codes here. (Optional)

Add or Edit your ICD-10 Codes here. (Optional)

Add or Edit your Checklist by Pending, Schedule, or Post Op time frames.

Add or Edit your Patient Documents: Surgical Documents that are automatically sent to your patients via email.

Add or Edit your Patient Reminders: Surgical Reminders that are automatically sent to your patients via text.

Turn ON or OFF Case Time: This will notify your patient of the scheduled time for the surgery as listed on the case.

Turn ON or OFF Cases Require Authorization by Default: When ON, signals whether the case has been authorized.

All of your cases can be found here 30 days after surgery.

Set what changes to a case will trigger your notifications. These are for you personally, not the team.

Cases Tab:

This is where you create new cases and edit existing cases. Existing cases are listed chronologically and sorted by status: To Be Determined (TBD), Pending, Scheduled, and Post-Op. Simply click on a case card to view details on the case and make changes to the team, procedure, date, time, etc. Swipe left on a case card to quickly adjust the status or cancel a case.

Schedule Tab:

This is where you will see all Scheduled, Pending, and Post-Op cases in an easy-to-read calendar. From the Schedule tab, select any case card in order to view the case details page.

Inbox Tab:

This is where all of your invites and pending cases are sent for your review and acceptance. Start here to look for your invites to Surgeon Care Teams and invites to individual surgeries.

Notifications Tab:

This is where all of your notifications appear in the order of which they are received. Each notification is time and date stamped along with who made the modification. Click on the notification to go directly to the case details and view the case.

Settings Tab:

This is where all of your Surgeon Teams settings and personal notifications are found. Click your Care Team access all of your surgery defaults and invite your care team members. The Help Center is located in the Settings tab and is a great resource with videos covering how to use all of the features in SurgerEase.

Create a Sample Case:

Step 1: Create a sample case inside the Cases tab by selecting the plus button in the top right corner of the page. This will open the new case wizard.

Step 2: Walk through each step of the new case wizard by selecting “next” or “skip.” Once finished the new case will appear in the “Pending” status folder in order to review. DO NOT INVITE TEAM MEMBERS TO THE SAMPLE CASE.

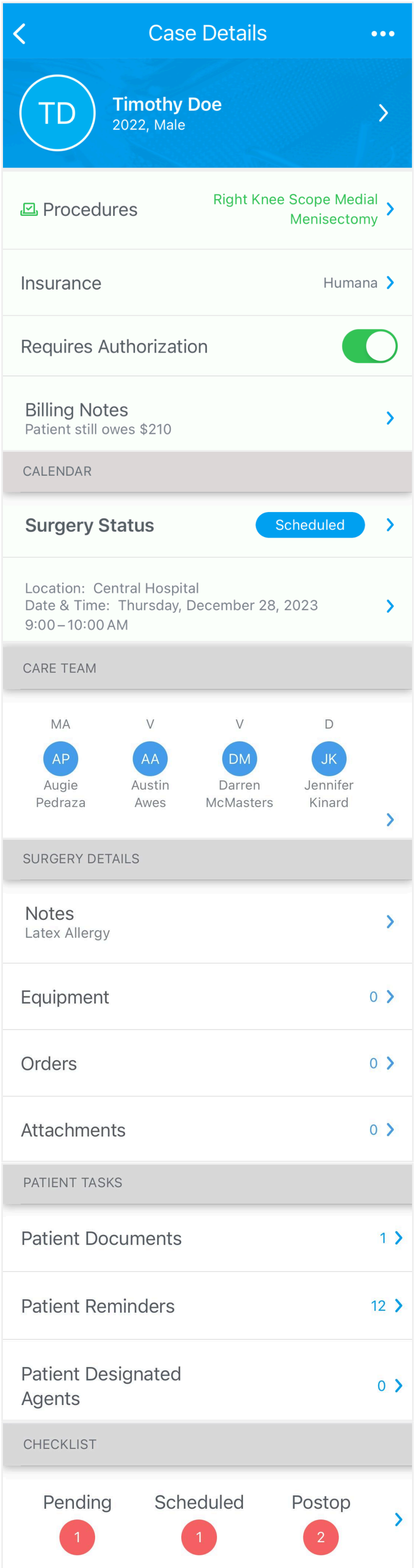
Step 3: Open your new case in the “Pending” folder in order to review the Case Details page. Here you will be able to review, include and adjust insurance, authorization, patient documents and reminders, equipment, notes, etc.

Step 4: Now move the case from “pending” to “scheduled” by clicking on the “Pending” icon. This will move the case to “Scheduled” and it will trigger the invite to you via push notification. You can now “delete” the case by swiping left on the case card or clicking the three dots in the top corner.

surgerease®

help.surgerease.com
support@surgerease.com

Case Details Defined



Print Case Details, Reschedule or Cancel Case here (...).

Edit your Patient Demographics here.

Add and Edit your Procedures here.

Add and Edit Insurance here.

Set Authorization requirements here.

Add Billing Notes here.

Change your Surgery Status here:
Pending / Scheduled / Post Op.

Add or Edit your surgery Location / Date / Time here.

Add or Edit your Care Team on this case here.
Color coded to easily see who will attend: Blue has accepted / Red has declined / Grey has not responded.

Add or Edit any Notes or general info about the case or about the patient here.

Add or Edit any Equipment for the case here.

Add or Edit any Orders for the case here.

Add or Edit any clinical Attachments for the case here.

Add or Edit any specific Patient Documents to be sent here.

Add or Edit any specific Patient Reminders to be sent here.

Selected Patient Designated Agents appear here.

Complete your surgery Checklist or To Do list here.