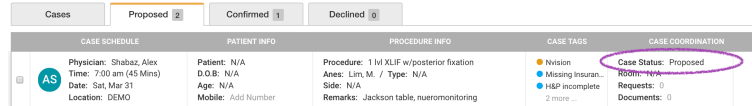


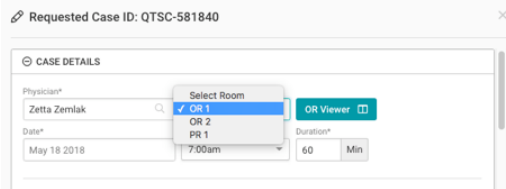
**Add the Proposed Case into AdvantX and include the Casetabs case ID:**

1. Navigate to the **Proposed** tab to view the list of pending cases
  - a. In the right-hand column of each case there will be a **Case Status**. Those cases that are in a "Proposed" status are new bookings.



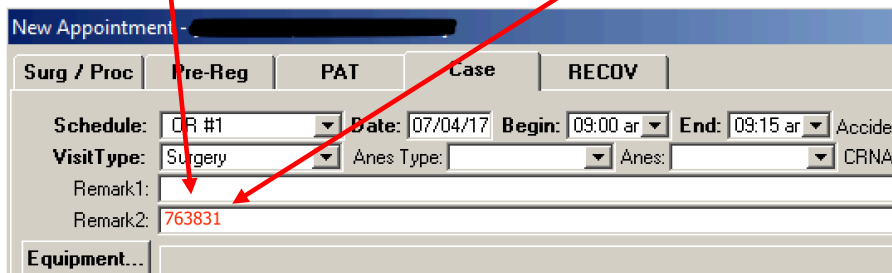
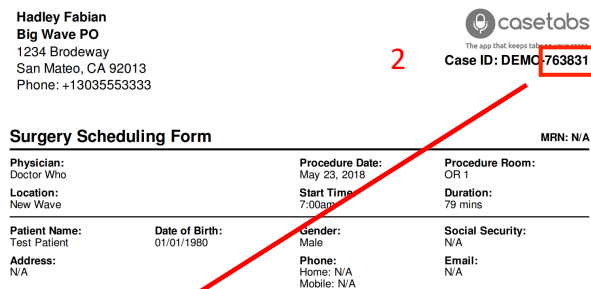
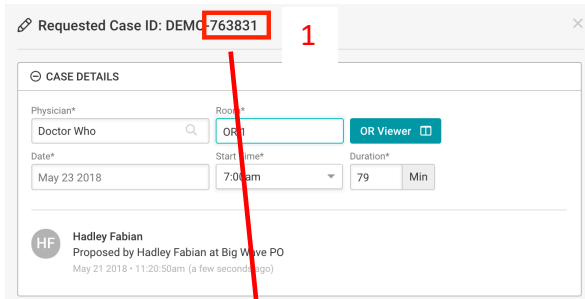
2. Click anywhere on one of your Proposed Cases to open the case to begin the approval and scheduling process

**Select/Confirm the OR** you want this case to be scheduled in:



3. **Edit** any fields you need to prior to approving and/or printing.
4. **NEW:** To eliminate the need for exact name/DOB matching, enter the unique Casetabs case ID in the first part of the AdvantX **Remarks 2** field. You can enter any text needed after the ID, as long as you put a space between the number and the next word (e.g. 763831 additional comments).

You can find/copy the Casetabs unique case ID from both the top of the Proposed Case (1) modal **OR** from the top of a printed Proposed Case scheduling sheet (2).



If you do not enter the Case ID, the fields need to match exactly between Casetabs and your practice management system when you first schedule the case in your practice management system:

- a. Surgeon
- b. DOS
- c. Patient First and Last name
- d. DOB
- e. Time of Surgery (You can send a request to Casetabs Support to have this requirement removed)