

# Converting a Non-PSI Case to a PSI Case

ZSMS How-To Guide / #HT-CSE-010

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NOTE: Uncontrolled after printing. See online content for latest version.

# Converting a Non-PSI Case to a PSI Case

If after boarding a non-PSI case such as a recon or a Materialise PSI case, it changes to a Zimmer PSI case, SMS allows users to use the existing case and convert it to a Zimmer PSI case. This document outlines the steps to accomplish this. Please note, the same requirements apply when converting to a PSI case (e.g. the designated PSI lead time between scan date and surgery date must be met).

## How to Convert a Non-PSI Case to a PSI Case

1. Locate the case that you would like to update (fig. 1).

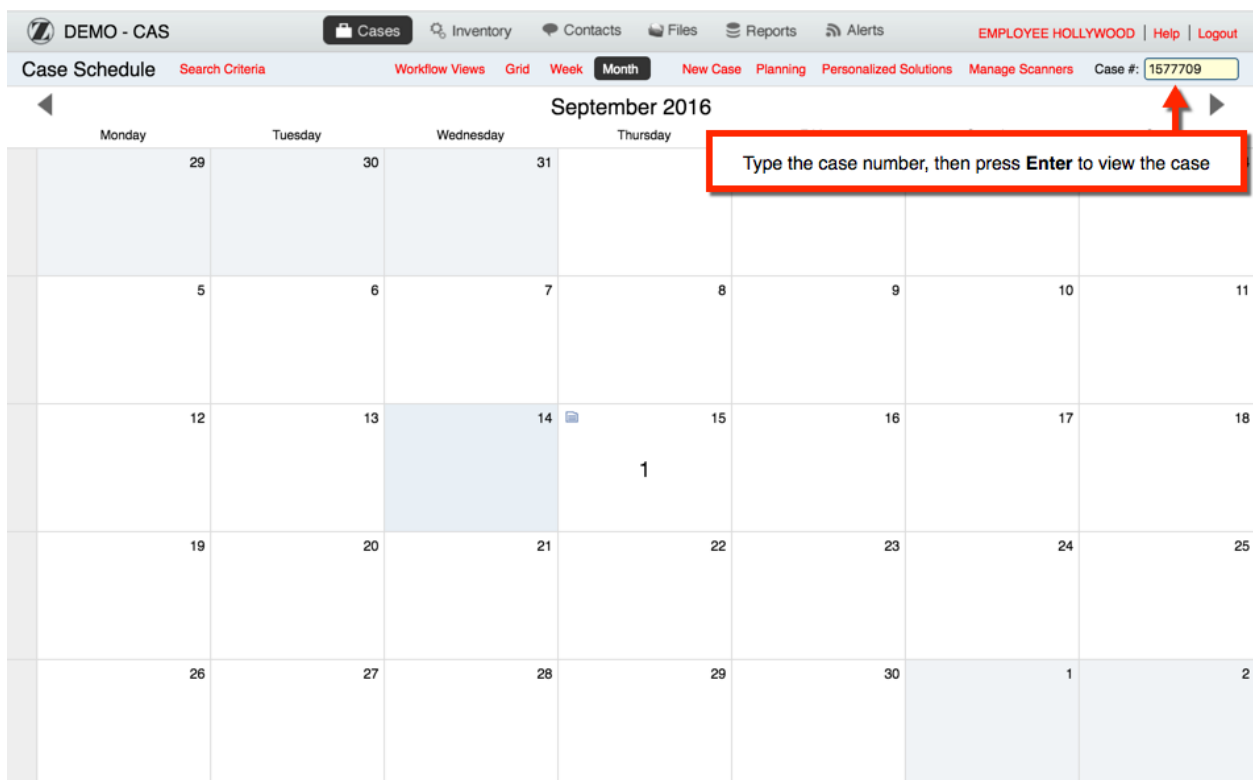


Figure 1

2. Select the **Convert to CAS PSI** link located in the Patient Specific Guide section of the case detail page (fig. 2).

DEMO - CAS

Case #1577709 **PENDING**

Submit Case Fast Forward Add Product Clone Generate Order Create Loaner Request Cancel

**Details** Edit

Site: 01 T0000 LOS ANGELES, CA  
Sales Associate / Team: REP #1 HOLLYWOOD  
Account: HOLLYWOOD MEDICAL CENTER (00002) (24HRS)  
Surgeon: MARY MEYER  
Patient: John Doe (33) (Male / Age 33)  
Coverage: REP #2 HOLLYWOOD  
Surgery: Oct 15, 2016 9:00 AM (Oct 15, 2016 7:00 AM)  
Pickup: Oct 15, 2016

**Distribution** (Show All) Edit

Implants Status: Not Started  
Instruments Status: Not Started  
Loan Orders:  
Return Orders:  
Payback Orders:  
Restock Orders:

**Customer Service** (Show All) Print Edit

CS Status: Not Reported  
Usage Status: Awaiting  
Restock By Date:  
Bills:  
Trans Bill:

**Surgery Information** (Show All) Edit

Description:  
Procedure: Knee - Partial (Z001)  
Body Side: LEFT

**Efficient Care Template**

PS Template Case No

**Patient Specific Guide** Convert to CAS PSI Edit

Materialise PSI Case No

**Additional Info** Edit

PO Rec Date:  
Shipping Carrier:  
Add On / Scheduled:  
Implant Bank Req:  
Implant Bank #:  
Loaner Pool:

**Click Convert to CAS PSI**

Figure 2

3. The Convert Case to CAS PSI window will appear. Fill out all required fields (marked with an asterisk) and click **Save** when done (fig. 3):

DEMO - CAS

Case #1577709 **PENDING**

Submit Case Fast Forward Add Product Clone Generate Order Create Loaner Request Cancel

**Details** Edit

Site: 01 T0000 LOS ANGELES, CA  
Sales Associate / Team: REP #1 HOLLYWOOD  
Account: HOLLYWOOD MEDICAL CENTER (00002) (24HRS)  
Surgeon: MARY MEYER  
Patient: John Doe (33) (Male / Age 33)  
Coverage: REP #2 HOLLYWOOD  
Surgery: Sep 15, 2016 9:00 AM (Sep 15, 2016 7:00 AM)  
Pickup: Sep 16, 2016

**Distribution** (Show All) Edit

Implants Status: Not Started  
Instruments Status: Not Started  
Loan Orders:  
Return Orders:

**Customer Service** (Show All) Print Edit

CS Status: Not Reported  
Usage Status: Awaiting  
Restock By Date:  
Bills:  
Trans Bill:

**Surgery Information** (Show All) Edit

Description:  
Procedure: Hip - Total (Z004)  
Body Side: LEFT

**Efficient Care Template**

PS Template Case No

**Patient Specific Guide** Convert to CAS PSI Edit

Materialise PSI Case No

**Convert Case to CAS PSI**

All fields marked with an asterisk (\*) are required.

Patient \* John Doe Male  
Patient Date of Birth \* 1983 06 17 Age:  
Surgeon \* MARY MEYER  
Knee - Partial is not approved for CAS PSI, please select a new procedure below  
Procedure \* Knee - Total (Z002)  
Modality \* MRI  
Scan Center \* HLYWD SCAN CTR (12)  
Scan Date 9/16/2016

Cancel Save

**After entering the required information, click Save**

Figure 3

- a. **Patient Name** - If a patient name was not entered on the original case, you will be prompted to go back to the case detail page and enter a patient name.
  - b. **Patient Date of Birth** - Enter the date of birth.
  - c. **Surgeon** - If the surgeon was not originally entered, please enter an approved surgeon name.
  - d. **Procedure** - There are four procedure types available for Personalized Solutions PSI cases (Knee - Total, Knee - Persona CR, Knee - Persona PS and Shoulder - Total). If a different procedure type was originally selected, you will be warned that the procedure type is not approved for CAS PSI. Select appropriate option from the drop down menu.
  - e. **Modality** - Select CT or MRI from the drop down menu.
  - f. **Scan Center** - Enter the scan center where the patient scan will occur.
  - g. **Scan Date** - If known, enter the scan date.
4. The case has now been converted to a PSI Case (fig. 4). Note that upon case conversion, the original SMS case number / ID remains the same however, a PSI Case ID is assigned and the PSI case status updates to Case Created/Awaiting Images.

**DEMO - CAS** | Cases | Inventory | Contacts | Files | Reports | Alerts | EMPLOYEE HOLLYWOOD | Help | Logout

**Case #1577709** PENDING | [Submit Case](#) | [Fast Forward](#) | [Add Product](#) | [Clone](#) | [Generate Order](#) | [Create Loaner Request](#) | [Cancel](#)

**Details** [Edit](#)

Site: **01 T0000 LOS ANGELES, CA**

Sales Associate / Team: **REP #1 HOLLYWOOD**

Account: **HOLLYWOOD MEDICAL CENTER (00002)** (24HRS)

Surgeon: **MARY MEYER**

Patient: **John Doe (33)** (Male / Age 33, 06-17-1983)

Coverage: **REP #2 HOLLYWOOD**

Surgery: **Oct 15, 2016 11:00 AM** (Oct 15, 2016 9:00 AM)

Pickup: **Oct 15, 2016**

**Distribution** [\(Show All\)](#) [Edit](#)

Implants Status: **Not Started**

Instruments Status: **Not Started**

Loan Orders:

Return Orders:

Payback Orders:

Restock Orders:

**Surgery Information** [\(Show All\)](#) [Edit](#)

Description:

Procedure: **Knee - Total (Z002)**

Body Side: **LEFT**

**Customer Service** [\(Show All\)](#) [Print](#) [Edit](#)

CS Status: **Not Reported**

Usage Status: **Awaiting**

Restock By Date:

Bills:

Trans Bill:

**Efficient Care Template** [Edit](#)

PS Template Case **No**

**Patient Specific Guide** [\(Show All\)](#) [Print](#) [BOL](#) [Edit](#)

PS Guide Case **Yes** The PS Guide Case option now shows Yes

Scan Center: **HLWYD SCAN CTR (12345)**

Scan Date: **Sep 16, 2016**

Left Body Side

Case ID: **JDO6B7L83MM16US**

Scan Images: [Upload Scans](#)

Status: CASE CREATED/AWAITING IMAGES

**Additional Info** [Edit](#)

PO Rec Date:

Shipping Carrier:

Add On / Scheduled:

Implant Bank Req:

Implant Bank #:

Loaner Pool:

Figure 4