

settrax Remote Vendor Scheduling

Schedule Cases from Your Dashboard

Some facilities offer **remote vendor scheduling**, allowing vendors to create and manage cases directly from the Settrax dashboard — no kiosk visit required before scheduling. This saves time on emergent and last-minute cases and lets you coordinate with your team more efficiently.

When Remote Scheduling is Available

- Facility must enable remote scheduling for your account.
- Enables quick case entry from any device — no need to wait until you're onsite.
- Allows you to share your schedule with teammates and couriers to ensure proper, on-time delivery.
- Helps prevent processing delays caused by incomplete or inaccurate case labels.

Remote Scheduling Steps

Schedule a New Case Remotely

(at select locations only)

1. Log in with your vendor credentials (one rep per login)
2. Go to the **Schedule** tab
3. Click **+ New Case** and select facility from drop down
 - a. Input case information including: case date + time, procedure, surgeon, patient initials. All other fields are optional.
4. Hit **Save**. The system will update to reflect the new case on the facility's schedule page as well as your own.

Important Guidelines

- Remote scheduling is facility specific. **Not all facilities offer remote scheduling.**
- Remote scheduling does NOT replace in-person check-in. The vendor must still complete the case check-in at the facility kiosk before the procedure
- If a facility doesn't appear in the dropdown, either the facility does not have remote scheduling enabled or the facility must grant you facility access.
- Works with vendor link + courier workflows



Troubleshooting Quick Tips

- **New Case button missing?** Remote scheduling is not enabled for that facility.
- **You were told scheduling is enabled, but you don't see it?** Ask the facility admin to grant access or contact Settrax support.

live chat | support@settrax.com | 866-900-0375

Weekdays 5am-5pm PT