**SELF-GUIDED PRACTICE WORKBOOK [N30]**
CST Transformational Learning

WORKBOOK TITLE:

# Surgery: Registration and Scheduling

*Last update: March 19, 2018 (v2)*

# TABLE OF CONTENTS

# SELF-GUIDED PRACTICE WORKBOOK

| Duration | 8 hours |
|---|---|
| **Before getting started** | ▪ Sign the attendance roster (this will ensure you get paid to attend the session)<br>▪ Put your cell phones on silent mode |
| **Session Expectations** | ▪ This is a self-paced learning session<br>▪ A 15 min break time will be provided. You can take this break at any time during the session<br>▪ The workbook provides a compilation of different scenarios that are applicable to your work setting<br>▪ Work through different learning activities at your own pace |
| **Key Learning Review** | ▪ At the end of the session, you will be required to complete a Key Learning Review<br>▪ This will involve completion of some specific activities that you have had an opportunity to practice through the scenarios. |
|  | ▪ When you see this icon, please refer to the datasheet for your patients. It is indicating a change in patient. |

# SCENARIO 1 – ALL CLERICAL POSITIONS

**Learning Objectives**

At the end of this Scenario, you will be able to:

- Create a Referral Encounter
- Convert the Referral Encounter into the Surgical Pre Registration Encounter
- Use Work Queue Monitor
- Navigate Perioperative Tracking
- Display and Navigate the Patient's Chart

## Overview

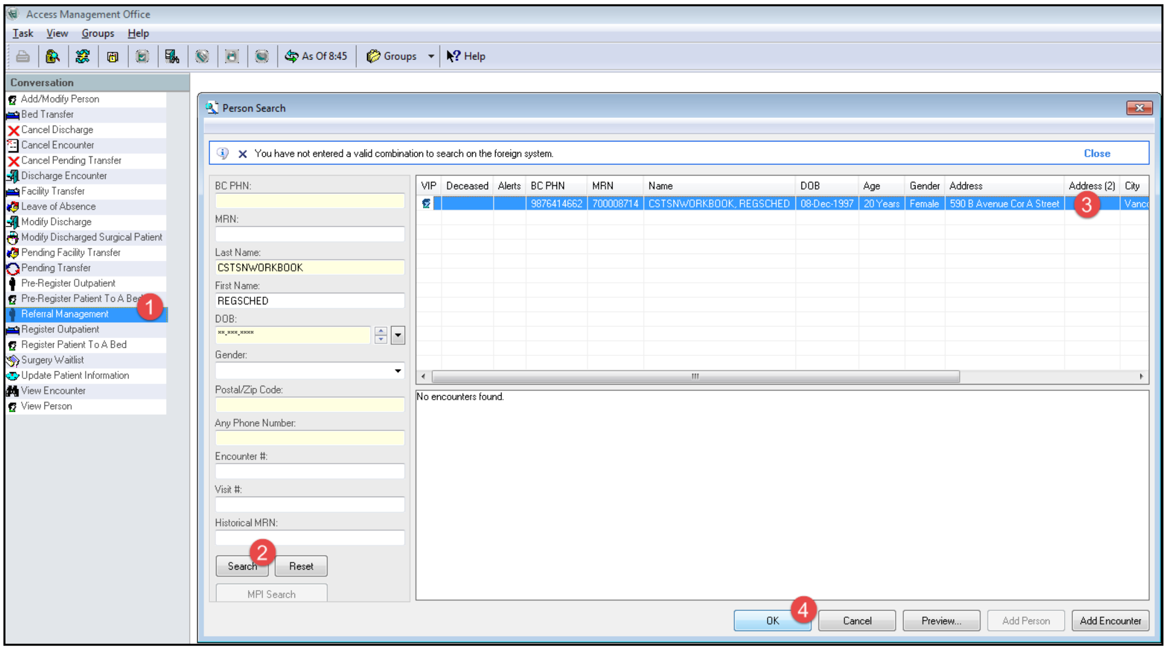
This work package includes Surgery related Registration and Scheduling specific supplementary material, to be learned in addition to the Scheduling Foundation Course and Registration Foundation Course.

To complete the activities within this workbook, one must successfully have completed a base learning prior in:

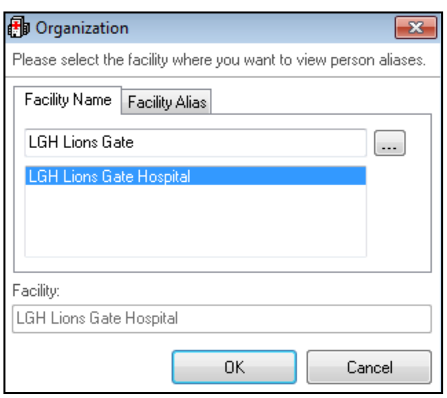
- Work Queue Monitor (from the Scheduling Foundation Course)
- Referrals (from the Registration Foundation Course)

# Activity 1.1 – Create a Referral Encounter

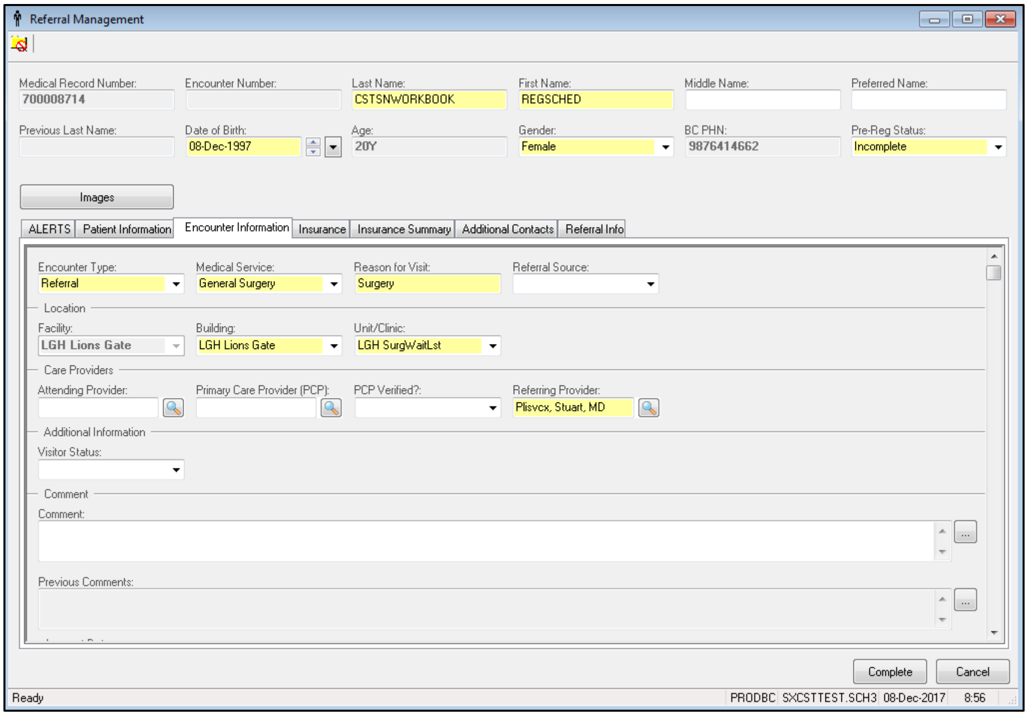
1 Before a surgeon can place an order for a patient on the day of consultation, an encounter is required. The encounter is created in PMOffice, through the Referral Management Conversation.




1. Login to PM Office to open the Access Management Office
2. Double click **Referral Management** under the **Conversation** list
3. Search for the patient using the CIS and EMPI search criteria
4. Select the corresponding patient record from *Person Search* window
5. Click on **Add Encounter**




6. Enter the corresponding facility = **LGH Lions Gate Hospital**
7. Click **OK**
8. Click **Close** on the EMPI External MPI window.




9. On the Patient Information tab, in the **Preferred Phone** field, select Home Phone Number.
10. Click the **Encounter Information** tab
11. Use the following information to complete the patient's record:
    - **Encounter Type** = *Referral*
    - **Medical Service** = *General Surgery*
    - **Reason for Visit** = *Surgery*
    - **Building** = *LGH Lions Gate*
    - **Unit/Clinic** = *LGH SurgWaitLst*
    - **Referring Provider** = *Plisvcx, Stuart*
12. Click the **Referral Info** tab
    - **Referral Received Date** = <Date>
    - **Referral Status** = Accepted
13. Click **Complete**
    - Encounter Number and Visit Id are displayed
    - Click **OK**

## Key Learning Points

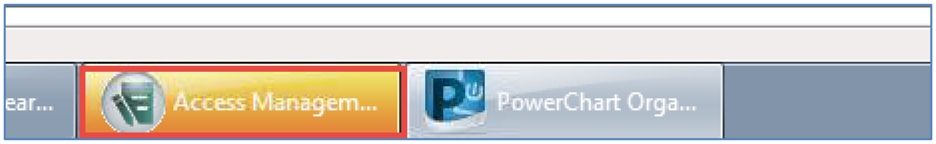
- Access the Referral Management Conversation
- Create and Complete a Referral Encounter

# Activity 1.2 – Convert a Referral Encounter to a Surgical Pre Registration Encounter

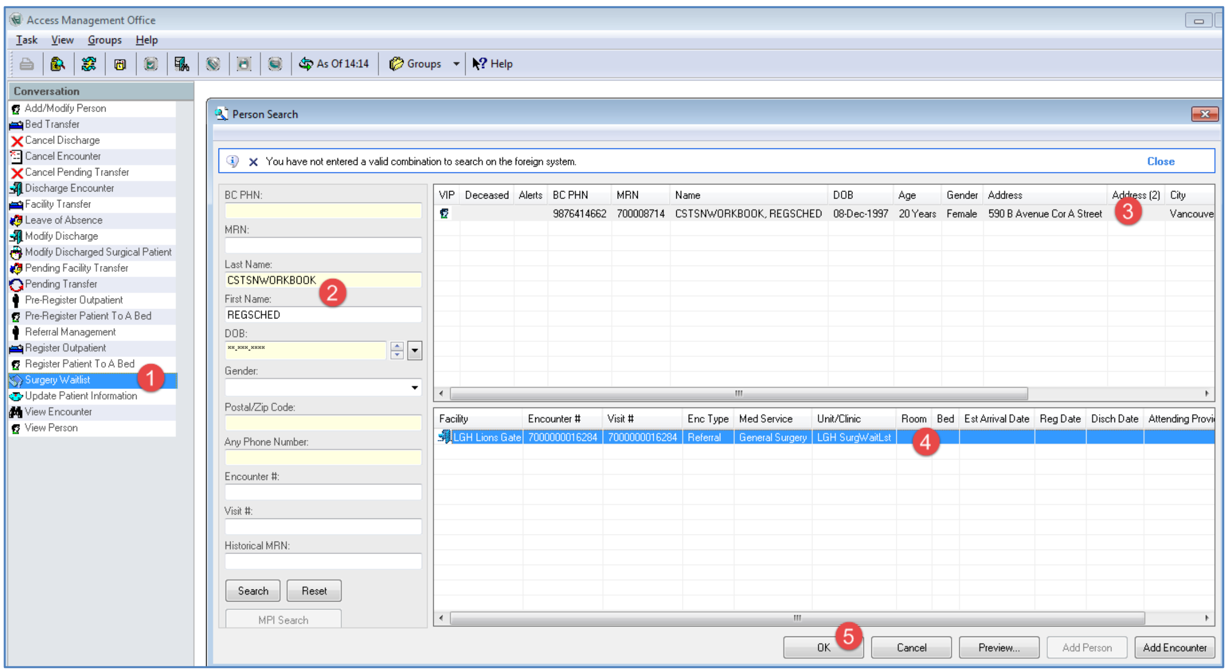
1

Before the Scheduling Clerk can place the patient into the Request List, the Clerk must convert the existing Referral Encounter associated with the patient into one of the types of the Surgical Pre-Registration Encounters (Refer to the Registration Foundation Course).

Clerk reopens PM Office again to convert the Encounter.




1. Click **Access Management Office** from the Task Bar above.




1. Double Click **Surgery Waitlist** under the Conversation list.
    - **Person Search** window displays
2. Search for the patient using the CIS and EMPI search criteria
3. Select the corresponding patient record from *Person Search* window
4. Select the **Encounter** where Enc Type Column displays as *Referral*

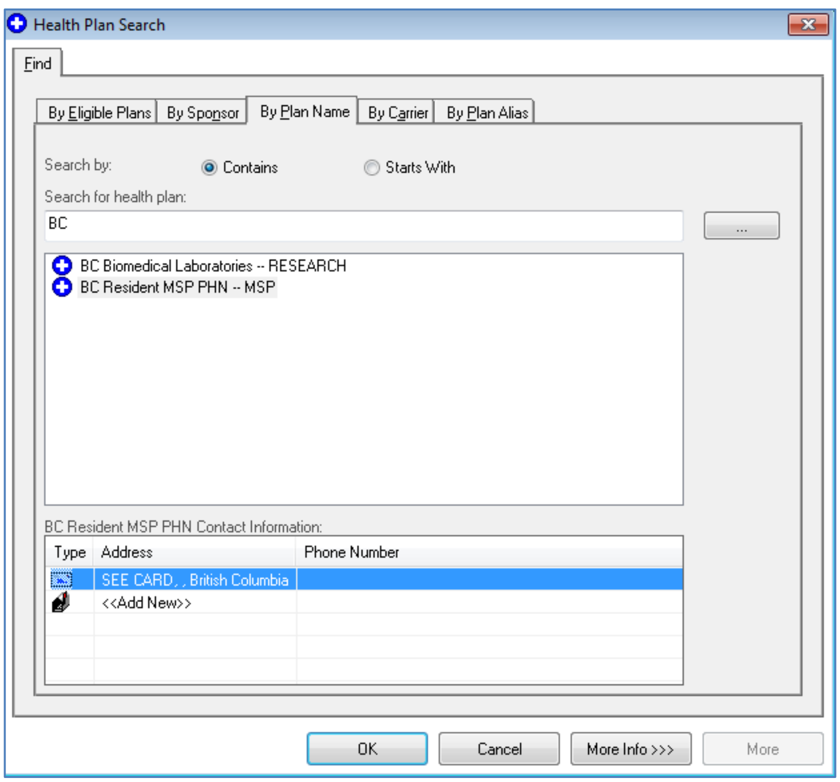
**Note**: If a referral encounter does not exist, a Surgical Waitlist Encounter will be created by clicking on Add Encounter.

5. Click **OK**
6. Click **Close** to close the External MPI window
7. The Change to Preadmit? window displays
    - Click **Yes** to continue

8. Use the following information to complete the patient's fields:
9. Click the Encounter Information Tab
    - **Encounter Type** = *Pre-Day Surgery*
    - **Medical Service** = *General Surgery*
    - **Reason for Visit:** *Surgery*
    - **Building** = *LGH Lions Gate*
    - **Unit/Clinic** = *LGH SurgWaitLst*
    - **Referring Provider** = *Plisvcx, Stuart*
    - **Attending Provider** = *Plisvcw, Tyler*
    - **Estimated Arrival Date** = *<Christmas Day>*
    - **Estimated Arrival Time** = *12:00*

**Note:** For definitions of each field, please refer to the Registration Foundation Course

10. Click the **Insurance** Tab and use the following information below to complete the necessary fields
11. Click **Search for Health Plan** in the Primary Insurance section
    - **Health Plan Search** window displays




12. Enter in the **Search for health plan** = *BC* and **click** the ellipsis button.
13. Select ***BC Resident MSP PHN – MSP*** from the result list
14. Select *SEE CARD,, British Columbia* from the **BC Resident MSP PHN Contact Information**
15. Click **OK**

16. From the Status In Canada drop-down, select **Canadian Citizen**
    - Mandatory fields display:
        - **Residency > 6 Months?** = <Yes>
        - **Document Type** = <Birth Certificate>
        - **Document Number** = <XX00001-10>

**Note:** For definitions of each field, please refer to the Registration Foundation Course

17. Click the **Waitlist Info** tab and use the following information below to complete the necessary fields:

    - **Referral Date** = *<Date>*
    - **First Consult Date** = *<Date>*
    - **Ready to Treat Date** = *<Date>*
    - **Booking Package Rec'd Date** = *<Date>*
    - **Admit Day Prior** = *0*
    - **Cancer?** = *Not Suspected*

| Fields | Description |
|---|---|
| Referral Date | Date when the Referral took place |
| First Consult Date | Date when the first consult occurred with the Surgeon |
| Ready to Treat Date | Date when the decision of surgery took place |
| Booking Package Rec'd Date | Date when the Booking Package is received |
| Admit Day Prior | Number of days when the patient arrives before the Admit Day |
| Admit Day Reason | Reason why the patient arrives early |
| Estimated Length of Stay | Estimated Length of the stay of the patient in the hospital.<br>Put '0' for Day Surgery procedures |
| Bed Type | Bed requirement for the case. E.g., ICU Bed |
| Monitoring | Patient condition that requires monitoring E.g., Section Apnea Monitoring |
| Cancer? | Flag to notify if Patient is Cancer suspected, Cancer Proven or Not suspected at all |
| Clinical Stage? | Stage of Cancer |
| Recurrent Cancer | Indicate if Cancer is Recurring |
| Has patient been assessed pre-operatively by a multi-disciplinary team? | Status of if patient has been assessed by another care team prior to surgery |
| C-Section Preferred Start Date | The earliest date the C-Section can be done |
| C-Section Preferred End Date | The latest date the C-Section can be done |
| EDC Date by Ultrasound | Estimated delivery date of Ultrasound |
| Unavailable Start Date 1 | Patient's unavailable start date |
| Unavailable End Date 1 | Patient's unavailable end date |
| Unavailable Reason 1 | Patient's reason for being unavailable, either Medical, Personal, Vacation, Work or Other |
| Unavailable Reason Comment | Free text field to expand the reason of being Unavailable |

**Note**: There are rules in defining the Unavailable Dates:

- Unavailable Dates cannot be overlapped and should be sequential
- Each Unavailable duration must be at least 14 days
- Each Unavailable duration must not exceed 1 year

18. Click **Complete**

- Encounter Number and Visit Id are displayed
- Click **OK**
- Document Selection Window Displays
- Click **OK**

### Key Learning Points

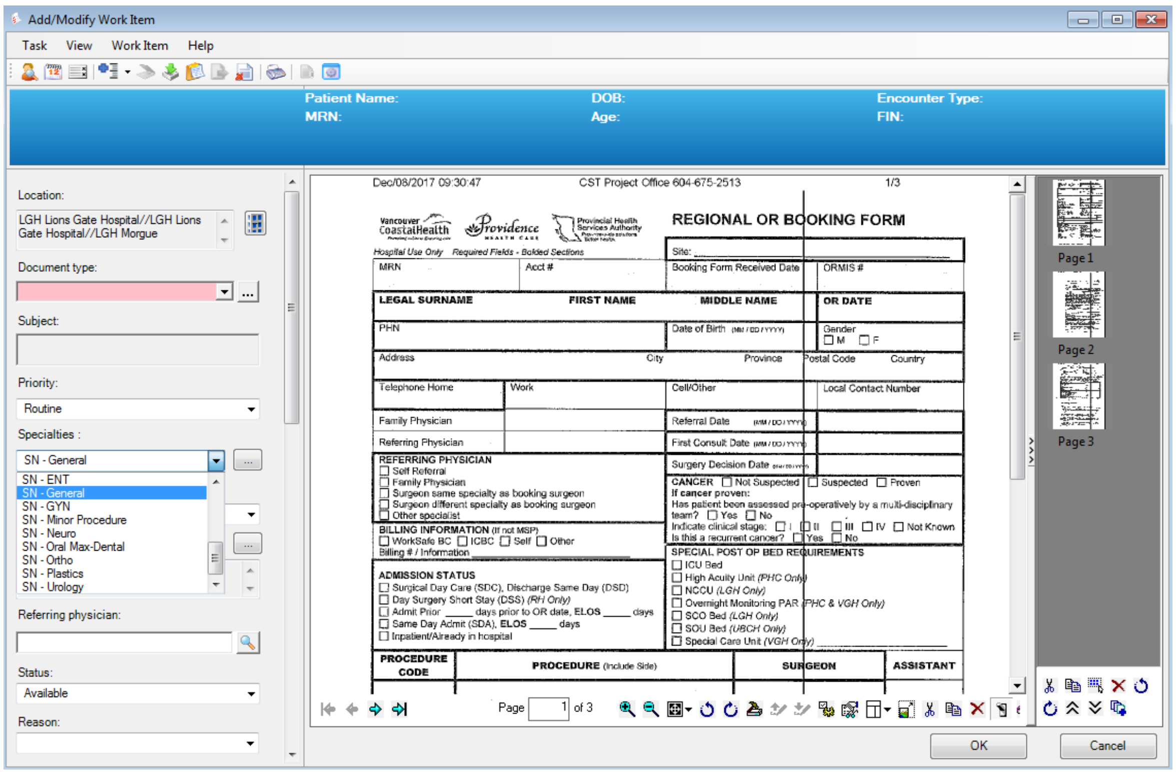
- Click Documentation in the Menu to review associated Patient Documentation
- If there is a pre-existing Referral Encounter, the Scheduling Clerk will convert that encounter into a Surgery Waitlist Encounter before scheduling the appointment

# Activity 1.3 – Work Queue Monitor

**1** When the Surgeon's office faxes the Booking Package to the Booking Office, it will be received as a work item in the **Work Queue Monitor**.

**NOTE**: A fax number is associated to a work queue (tab) in **Work Queue Monitor**.

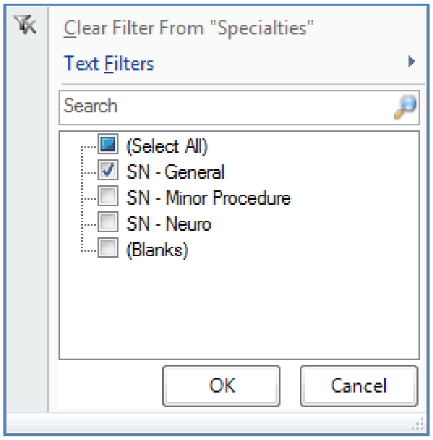
The Clerk views and tags work items by specialty.




1. Login to **Cdiworkqueuemonitor** to launch **CPDI Work Queue Monitor**
2. Click the appropriate **Work Queue** = *LGH SURG All Other Services* (if not yet displayed)
3. Double Click the corresponding work item
   a. **Add/Modify Work Item** window displays
4. In the **Specialties** field, click on the ellipsis, then double click on = *SN – General*
5. Click **OK**
6. Click **OK** once again when the document appears in the main window.
7. Click **Yes** when asked to continue the submission without completing the requested fields

2

Filtering allows you to pull out only the information you require for your specialty. To filter the Work Queue based on SN – General specialty:



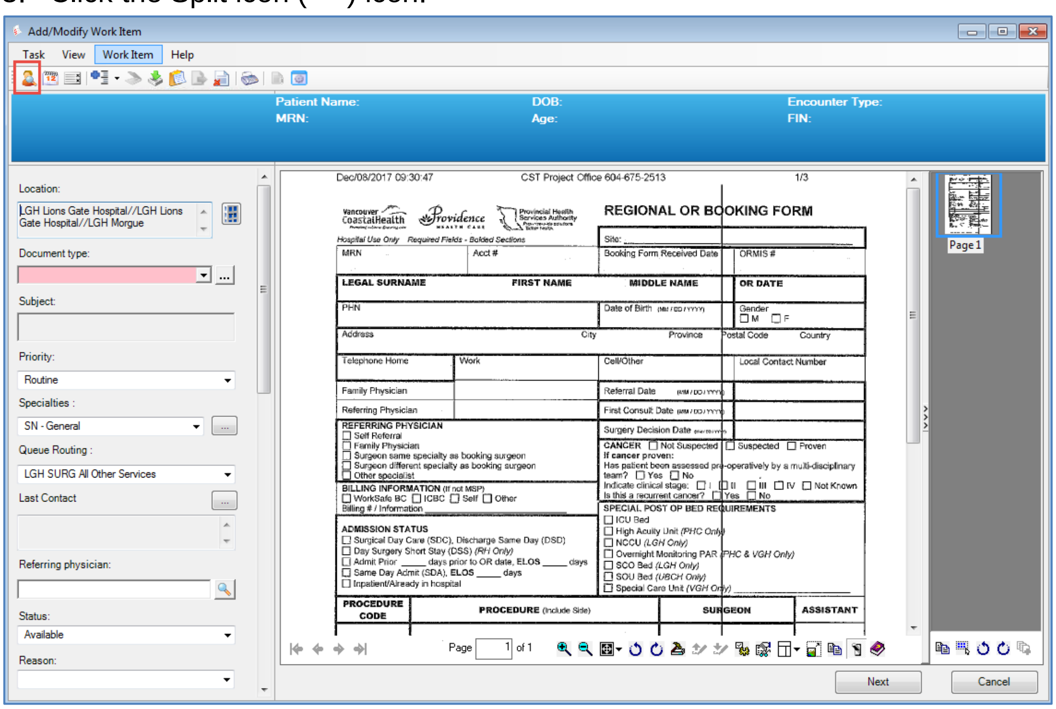

1. Click the Filter ( ) icon in the Specialties column heading.
2. Click the checkbox to uncheck the (Select All)
3. Click the checkbox for **SN - General**
4. Click **OK**

3

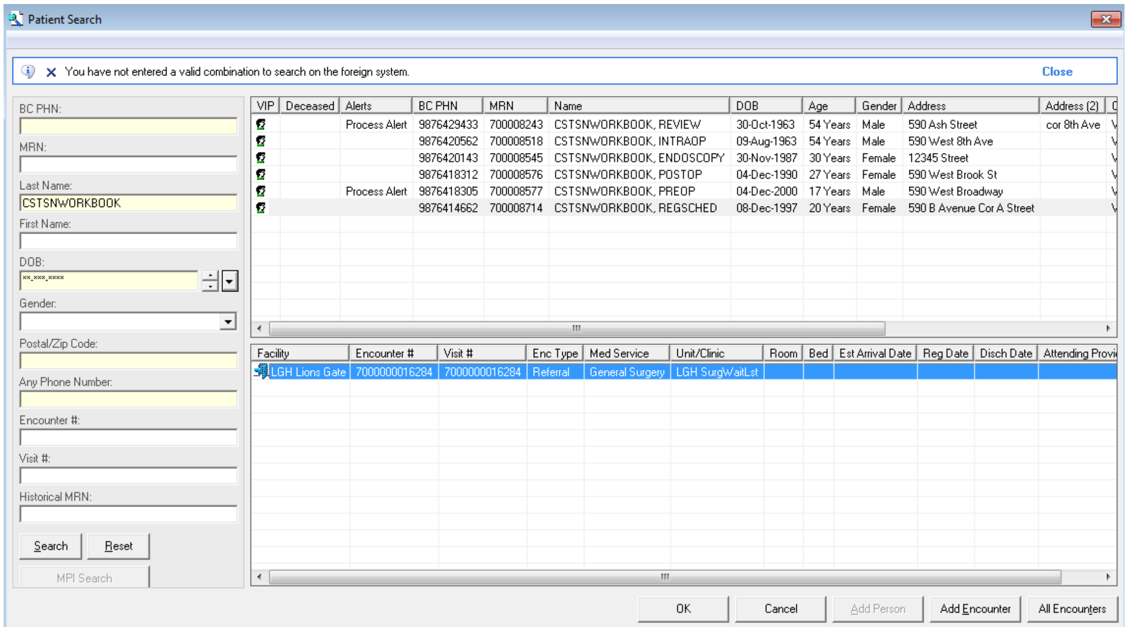
Clerk will need to associate the work item to a Patient's chart.

When the Booking Package is received as one file, the clerk needs to split the scanned document and process it individually.

1. Double click the corresponding work item
   - Add/Modify Work Item window displays
2. Click Page 1 of the Booking Package document in the All Page View Bar.
3. Click the Split icon ( ) icon.

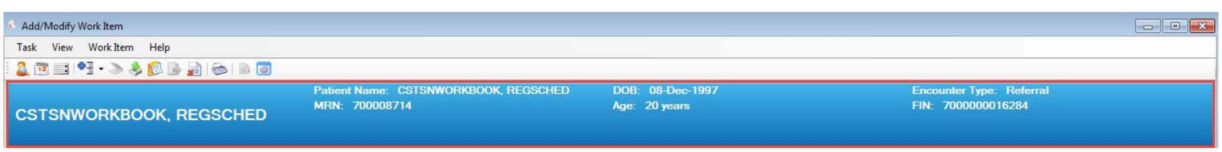


4. Click **Select a Patient** () icon
   - Person Search window displays

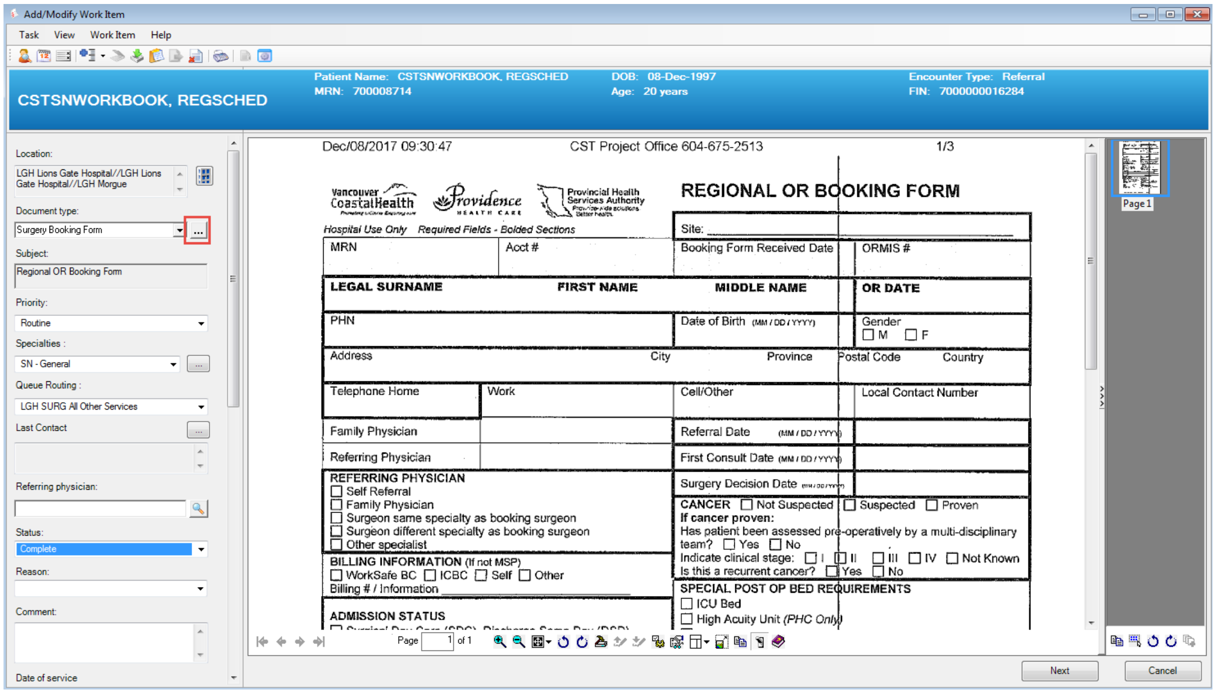



5. Enter the Patient's information:
   - **First Name** = *<first name>*
   - **Last Name** = *<last name>*
6. Click **Search**
7. **Select** the patient from the result list **and select** their Surgery Waitlist encounter.

**Note**: You can also associate documents to a Referral Encounter.

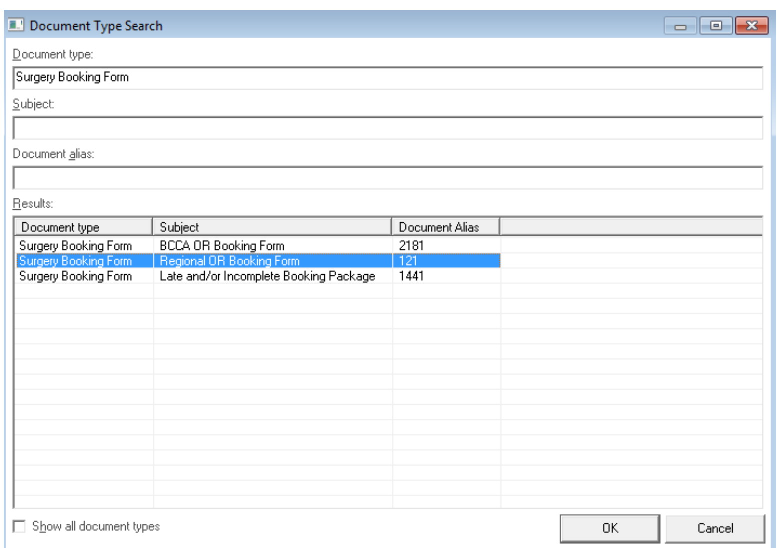



8. Click **OK**
   - The selected Patient is now displayed in the Banner Bar of the Add/Modify Work Item window
9. Click **Close** to close the External MPI window.




10. At the Document Type field, click the **Ellipsis** (...) icon

- Document Type Search window displays




11. Enter the **Document Type** = *Consent Procedure*
    - **Subject** = *Consent – Surgical Operation, Special Procedure or Treatment and Special Considerations*
    - **Document Alias** = *1*
12. Click **OK**
    - Document Type Search window closes
    - Document Type and Subject are now filled with the selected values
13. Select **Status** = *Complete*

14. Click **Next**
    - Maintain Information window displays
15. Click **Maintain Patient Context** checkbox
16. Click **OK**
    - The Work Item displays with the remaining scanned documents

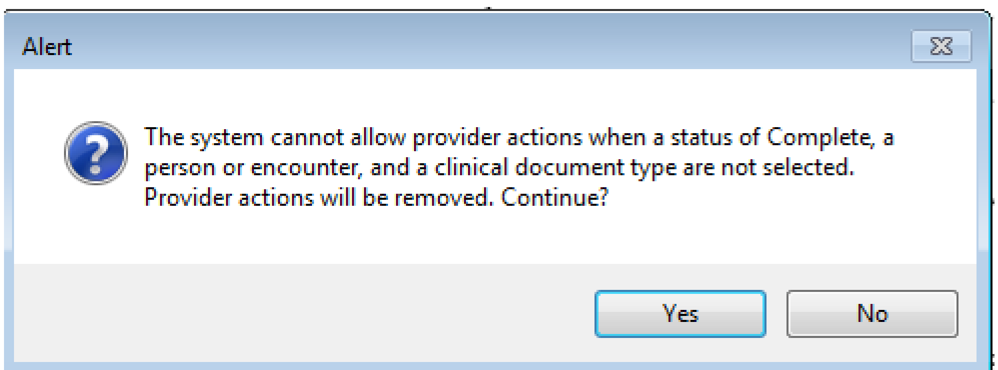
**Note:** The Second Consent Form, Medical Questionnaire and Surgery Booking Form can be associated in the same way by repeating these steps.

Associate the remaining document types, using the steps above:

For Second Consent Form:

- **Document Type** = *Consent Blood Products*
- **Subject** = *Consent Blood Products*
- **Document Alias** = NA

This Alert will appear between each split:




Click **Yes**.

Associate the remaining document types, using the steps above:

For the third document, Medical Questionnaire:

- **Document Type** = *Medical Questionnaire*
- **Subject** = *Medical Questionnaire (Surgery)*
- **Document Alias** = 1289

For the fourth document, *Surgery Booking Form*

- **Document Type** = *Surgery Booking Form*
- **Subject** = *Regional OK Booking Form*
- **Document Alias** = *121*

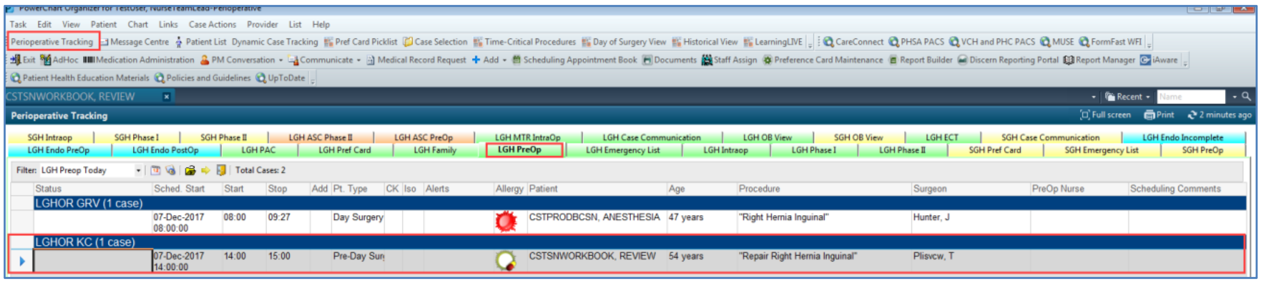
Please refer to the Scheduling Foundation Course for further information on Work Queue Monitor.

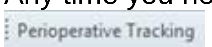
## Key Learning Points

- A fax number is associated to a work queue (tab) in Work Queue Monitor
- Work Queue Items can be filtered based on specialties
- Work Items can only be associated to a patient with an existing encounter
- Booking Packages received as one file will need to be split and processed individually

# Activity 1.4 – Navigate Perioperative Tracking

1 **Perioperative Tracking** will display various views (or tabs) depending on your area/login. Utilization of **Perioperative Tracking** views (e.g., LGH Preop) is recommended to access patient charts within the PAC and Surgical units. Perioperative views act as a slate, a communication tool, and eliminates the need to search for patients individually.



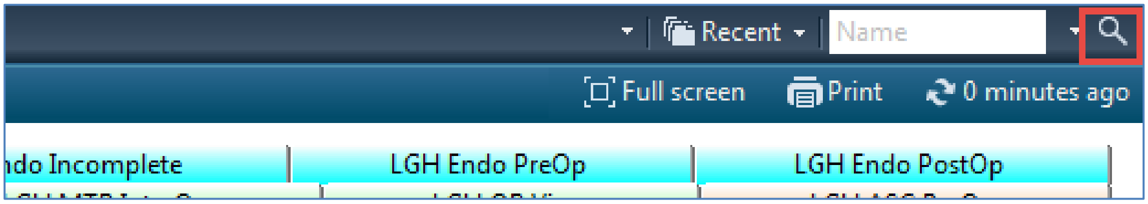

1. Login to PowerChart to access **Perioperative Tracking**.
2. Any time you need to navigate back to Perioperative Tracking you can click   from the Toolbar.
3. Patients will display in their specified tracking view.
4. Each row within this table represents a patient. They are typically arranged by room (e.g. OR).

## Key Learning Points

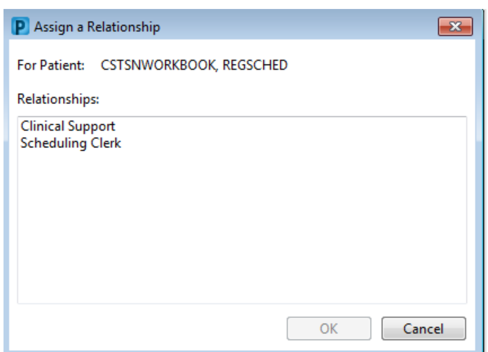
- You can use the Perioperative Tracking within the toolbar to return to Tracking Views from any other area of PowerChart

# Activity 1.5 – Display and Navigate the Patient Chart

1



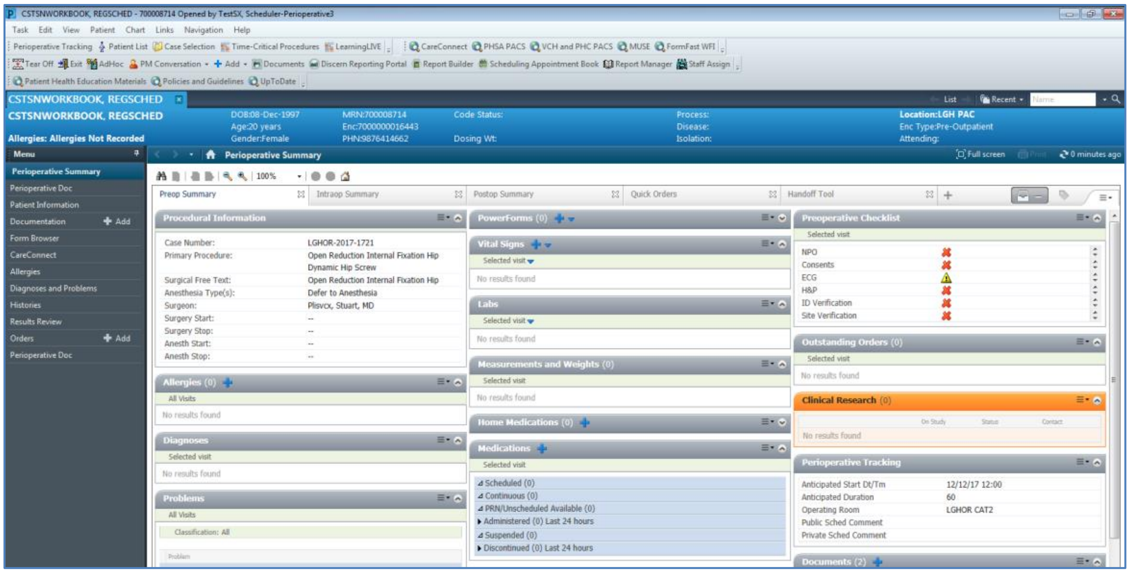

1. Open the patient's chart in **Perioperative Tracking** by clicking the magnifying glass located on the top right hand corner of the application
    a. **Encounter Search** window displays
2. Enter the Patient's information:
    a. **First Name** = *<first name>*
    b. **Last Name** = *<last name>*
3. Click **Search**
4. **Select** the patient from the result list **and select** their existing encounter
5. Click **OK**




6. If this is the first-time logging in a patient's chart, the **Assign a Relationship** window will display, verify this is the correct patient. Select **Scheduling Clerk** to assign relationship.

**Note:** If this is the wrong patient, Click **Cancel** to return to **Tracking View**

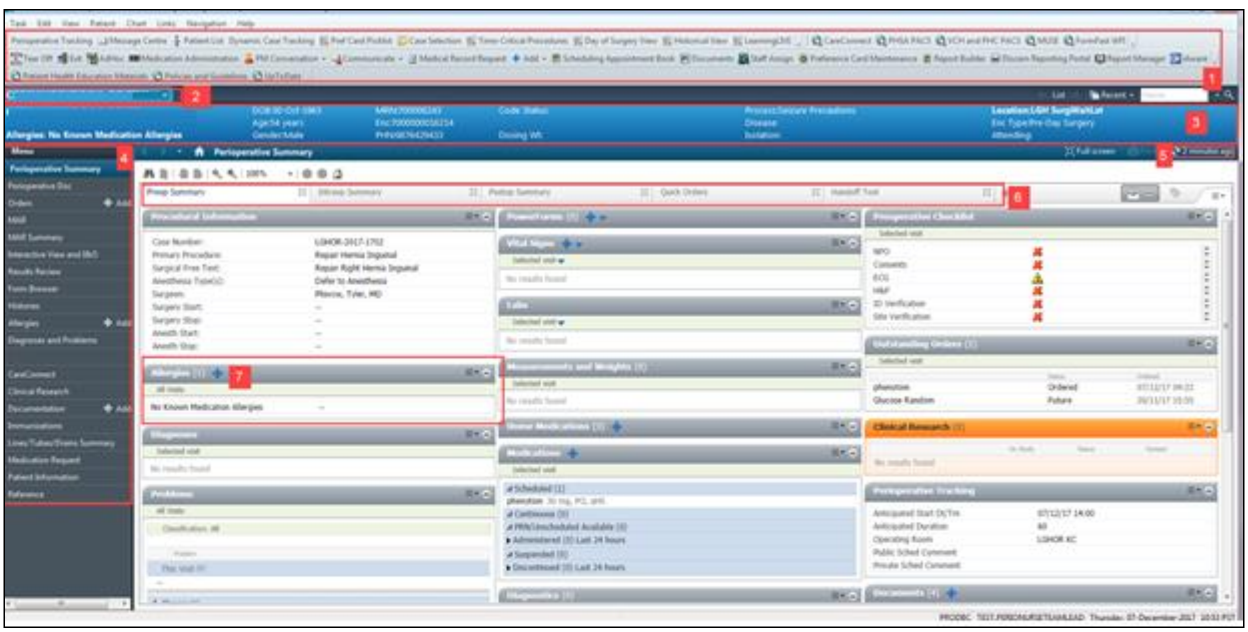
7. Click **OK**




8. **Perioperative Summary** displays when you access a patient's chart. Verify this is the correct patient's chart that has opened.

2 Navigate the Patient chart

Upon accessing the patient's chart you will see the **Perioperative Summary** page open. The Summary will provide views of key clinical patient information.



1. The **Toolbar** is located above the patient's chart and it contains buttons that allow you to access various tools within the Clinical Informatics System.

2. **Patient** tab – displays patient's name and clicking on ✖ will close the chart.

3. The **Banner Bar** displays patient demographics and important information that is visible to anyone accessing the patient's chart. Information displayed includes:

- **Name**
- **Allergies**
- **Age, date of birth, etc.**
- **Encounter type and number**
- **Code status**
- **Weight**
- **Process, disease and isolation alerts**
- **Location of patient**
- **Attending Physician**

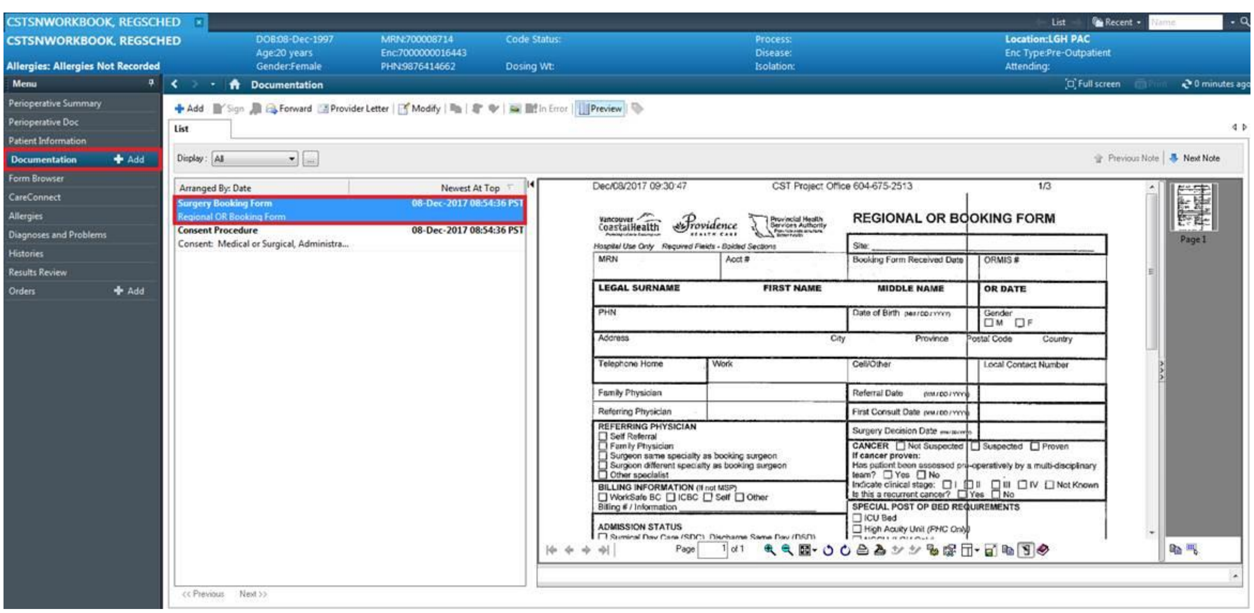
4. The **Menu** on the left allows access to different sections of the patient chart. This is similar to the coloured dividers within a paper-based patient chart. Examples of sections included are Orders, Medication Administration Record (MAR) and more.

5. The **Refresh** icon updates the patient chart with the most up to date entries when clicked. It is important to refresh the chart frequently especially as other clinicians may be accessing and documenting in the patient chart simultaneously.

6. There are different tabs (e.g. Preop Summary, Intraop Summary, Postop Summary, Quick Orders, Handoff Tool, and Discharge) that can be used to learn more about the patient. Click on the different tabs to see a quick overview of the patient.

7. Each tab has different components. You can navigate to different sections of the chart by clicking on the component link(s) e.g. clicking on the **Allergies** link Allergies (1) or Add is the same as clicking on the Allergies band in the Menu.

| 3 | Now that the Booking Package has been associated into the Patient's Chart, the documents can be viewed from PowerChart. |
|---|---|



1. Click **Documentation** from the Menu
2. Click each Documentation (E.g., Surgery Booking Form and Consent Procedure)

## Key Learning Points

- The blue arrow indicates that you have selected a patient in the tracking view
- Users accessing a patient's information for the first time are prompted to assign the relationship with the patient e.g. Scheduling Clerk.
- Verify the correct patient's chart has opened.
- The Perioperative Summary page provides an overview of the patient information and allows for navigation elsewhere in the chart.

# SCENARIO 2 – OR SCHEDULING CLERK

**Learning Objectives**

At the end of this Scenario, you will be able to:

- Book an Elective Appointment
- Use Request Lists / Request List Inquiry
- Cancel a Confirmed Appointment
- Cancel a Request
- Interfacililty Transfer
- Staff Assign

## Overview

This work package includes Surgery related Registration and Scheduling specific supplementary material, to be learned in addition to the Scheduling Foundation Course and Registration Foundation Course.

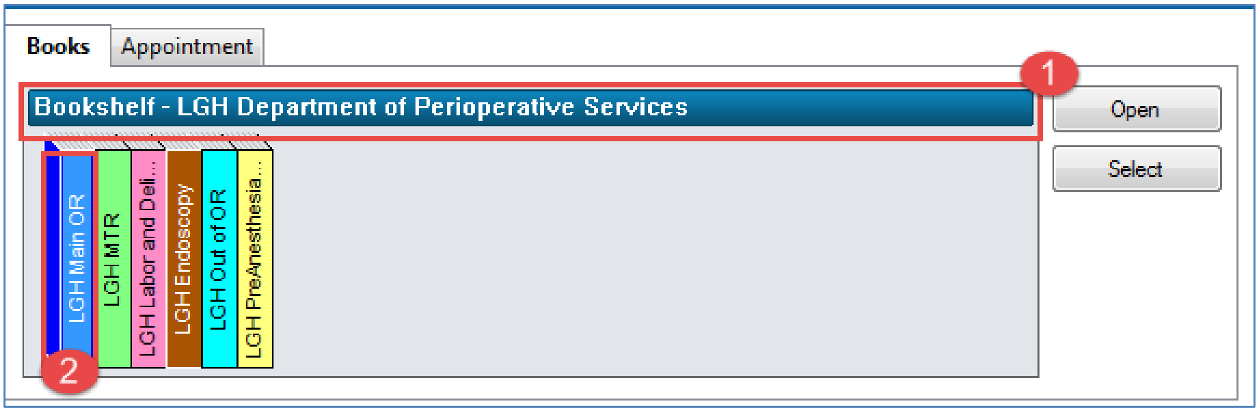
To Complete the activities within this workbook one must successfully have completed a base learning prior in:

- Request Lists (Scheduling Foundation Course)
- Appointment Scheduling (Scheduling Foundation Course)
- Referrals (Registration Foundation Course)

**Note:** For Minor Procedure Clerks please also complete Activity 5.2 in addition to this Scenario

# Activity 2.1 – Navigating the SAF for an Elective Appointment

1 Login to Schapptbook to launch the Scheduling Appointment Book




To begin, ensure that your scheduling grid displays the LGH Main OR.

If not, Open the Bookshelf – **LGH Department of Perioperative Services** and Select the **LGH Main OR Book** (Please refer to the Scheduling Foundation Course, to review steps on how to access the Bookshelf and Books)

2 When booking an appointment, it is important to note that there are several Appointment types in Surgery:

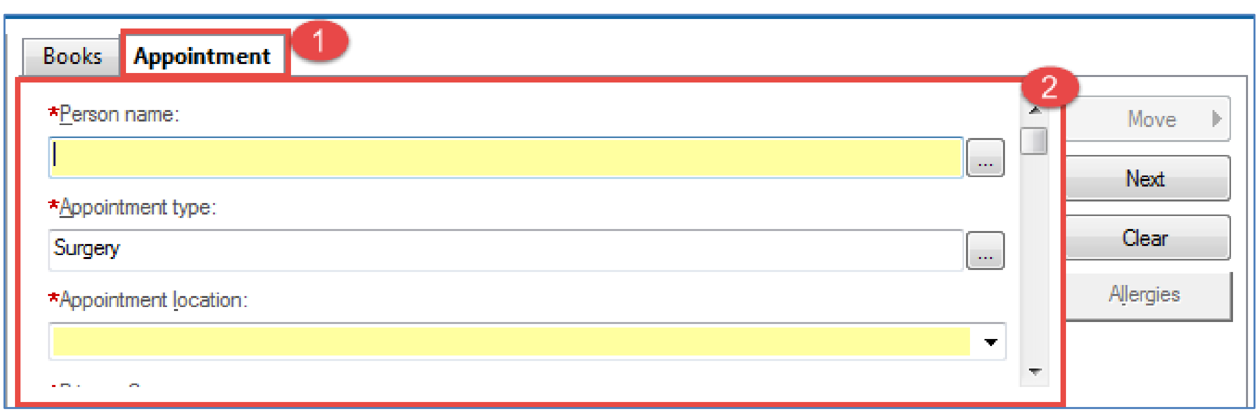
- Surgery
- Surgery Rapid
- Surgery Minor Procedure
- Surgery Endoscopy
- Surgery PAC
- Surgery PAC Anesthesia Only
- Surgery PAC JRAC
- Surgery PAC Nurse and Anesthesia
- Surgery PAC Nurse Visit
- Surgery PAC Other
- Surgery PAC Phone Call
- Surgery PAC RASC
- Surgery PAC W/ Screening
- Surgery Anes Out of the OR/Non- Surgical
- OB Anesthesia

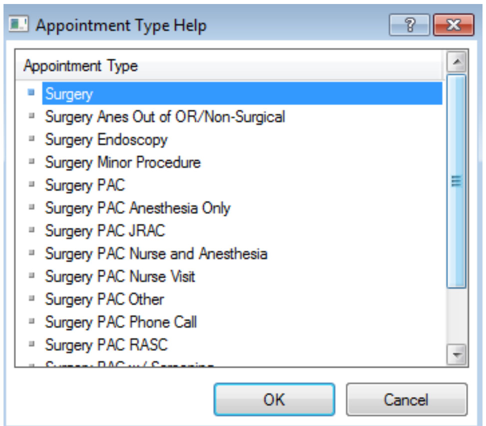
| Appointment type | Definition |
|---|---|
| Surgery | Used for booking an Elective appointment |
| Surgery Rapid | Used for booking an Emergency appointment |
| Surgery Minor Procedure | Used for booking a Minor Treatment appointment |
| Surgery Endoscopy | Used for booking an Endoscopy appointment |
| Surgery PAC | Used for booking stand-alone PAC Appointment without confirmed Surgical appointments |
| Surgery PAC Anesthesia Only | Used for booking stand-alone PAC appointments to see Anesthesiologists only |
| Surgery PAC JRAC | Used for booking PAC appointment for JRAC patients |
| Surgery PAC Nurse and Anesthesia | Used for booking PAC appointment to see Nurse and Anesthesiologist |
| Surgery PAC Nurse Visit | Used for booking PAC appointment to see Nurse only |
| Surgery Other | Used for booking PAC appointment to see other specialty provider |
| Surgery Phone | Used for booking PAC appointment via phone call |
| Surgery PAC RASC | Used for booking PAC appointment for RASC patients |
| Surgery PAC w/ Screening | Used for booking PAC screening appointment |
| Surgery Anes Out of the OR/Non-Surgical | Used for booking Anesthesiologist time out of the OR |
| OB Anesthesia | Used for booking epidural for expectant mother |

**To book an elective appointment:**

1. Click on the **Appointment Tab**
2. Fields Within the Appointment Tab are called **Scheduling Accept Format** fields (or simply **SAF** fields). Selecting an **Appointment Type** will modify the **SAF** fields.

**Note:** For definitions of each field, please refer to the Scheduling Foundation Course






Continue by selecting an Appointment type:

3. Click the **Appointment** Tab in Schapptbook
4. Enter **Surgery** in the Appointment Type field
5. Click the Ellipsis (...) icon next to the Appointment Type Field
6. Appointment Type Help window displays
7. Select **Surgery**
8. Click **OK**

Note: By selecting "Surgery" as an Appointment type, it displays the following SAF fields that may be needed to book this appointment.

- *Person name
- *Appointment location
- *Primary Surgeon
- Anesthesiologist
- Patient Type
- Priority
- Add On
- PAC Required?
- BC Diagnosis/PCATs Code
- Revision Reason
- Preop Diagnosis Comment
- Reason for Procedure
- Surgeon – Secondary
- First Assistant
- Out of Town
- Sched Event ID
- IOL Payment Received?
- Private Surgical Comments
- Public Surgical Comments

**Note:**

* - these fields are always present in the Appointment tab.

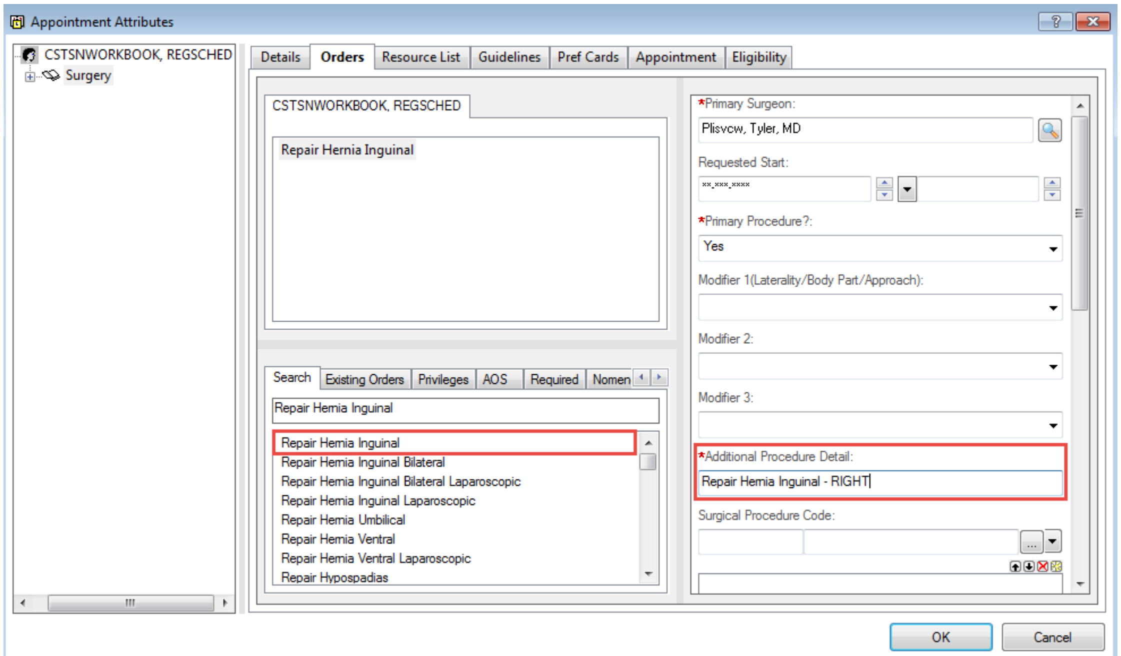
Mandatory fields will also change depending on the Appointment tab

Surgery Rapid and Surgery PAC will be discussed in later activities.

3

Continue following these steps to complete the booking of an Elective Appointment into the Work in progress (Refer to the Scheduling Foundation Course as an additional resource if needed):

1. Click the Ellipsis (...) icon beside the **Person Name** Field
    - **Person Search** window displays
2. Enter the Patient's information:
    - **First Name** = *<first name>*
    - **Last Name** = *<last name>*
3. Click **Search**
4. Select the patient from the result list and select the appropriate **Encounter =** *Pre-Day Surgery*
5. Click **OK**
6. Click **Close** to close the External MPI window
7. The Appointment Tab Displays.
8. Select **Appointment location** from the drop down = *LGH Main OR*
9. Enter **Primary Surgeon** = *Goldberg, Aron*
10. Select **Patient Type** = *DSS – Day Surgery Short Stay*
11. Verify that **Priority** = *Elective* (if not, Select **Elective** from the drop down)
12. Verify that **Add On?** = *No* (if not, Select **No** from the drop down)
13. Verify that **PAC Required?** = *Defer to PAC Screening* (if not, select Defer to PAC Screening from the drop down)
14. Enter **BC Diagnosis/PCATs Code** = *AGENL30SYAA on the first box* and press **Enter** from the keyboard
    - Nomenclature Search window displays
15. Select the correct Diagnosis from the Nomenclature Item section
    - Source String = *12W Inguinal or femoral hernia*
    - Code = *AGENL30SYAA*
16. Click **OK**
17. Click **Move**
    - **Appointment Attributes** window displays (Orders tab is displaying by default)




18. Search the Procedure by entering in the Search text field = *Repair Hernia Inguinal* and press **Enter**.
19. Double Click on the corresponding Procedure *Repair Hernia Inguinal* from the list
20. Enter the **Additional Procedure Detail** = *Repair Hernia Inguinal – RIGHT*
21. Click **OK**

At this point, the appointment is now in the **Work in progress (WIP)** section of Schapptbook.

If the Surgery Date is **KNOWN,** you would drag and drop the appointment into the Calendar (Please refer to the Scheduling Foundation Course). If the Surgery Date is **UNKNOWN,** (which it is for this course), then proceed to the next Activity.

## Key Learning Points

- There are several Appointment Types in Surgery
- Fields within the SAF will change depending on the Appointment Type selected

# Activity 2.2 – Request Lists / Request List Inquiry

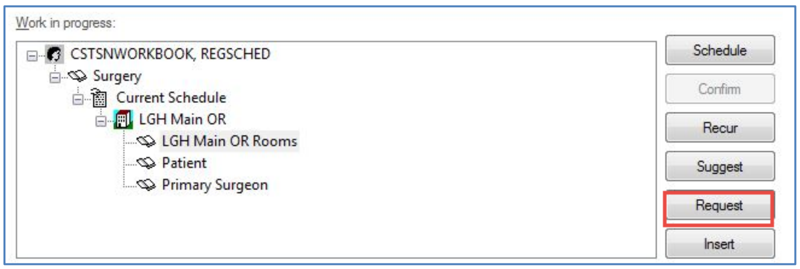
1

An appointment without a confirmed Surgical or PAC date is called a Request. The Surgical Request List Inquiry holds a list of patients without a confirmed date.

There are two ways for a Scheduling Clerk to place a request into the Request List. The first is through the Work in progress Window and the second is by postponing a confirmed appointment (To be discussed in Activity 2.5).

2

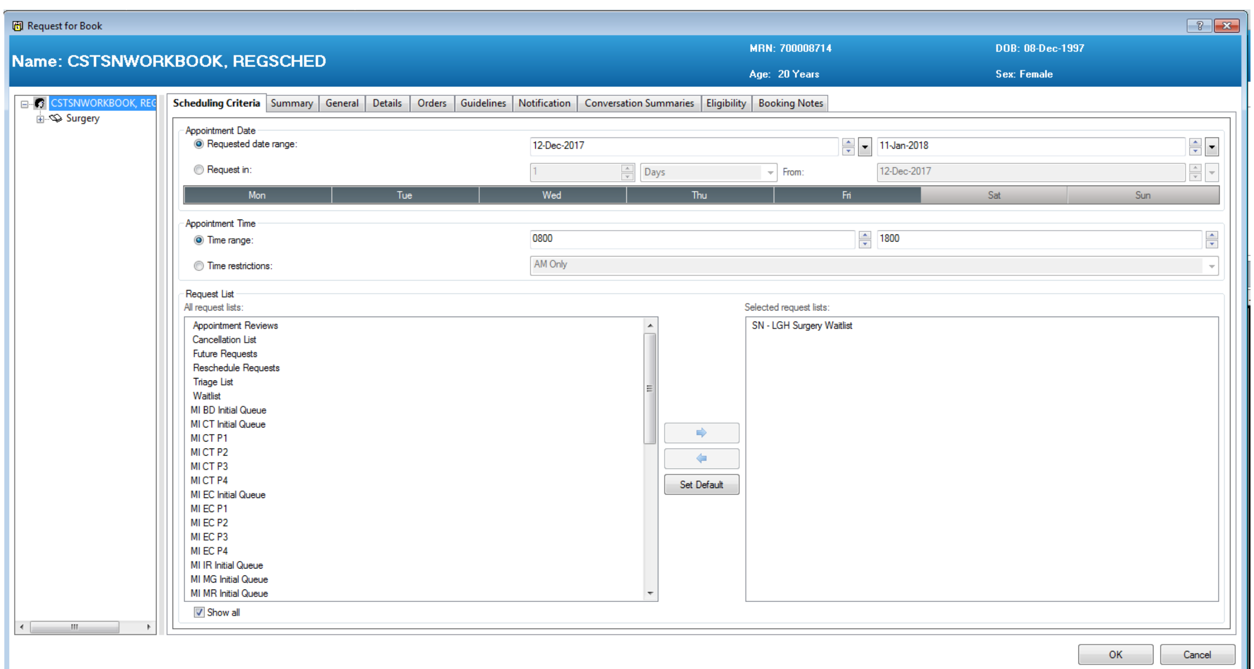
## A. Placing a Patient into the Request List via Work in progress




To begin this activity, ensure that your patient is located in the Work In progress Window (Refer to Activity 2.2).

1. Click **Request**

   - Request for Book window displays




2. Verify the ***SN-LGH Surgery Waitlist*** displays in the Selected Request Lists Window.

   **Note:** If the request list is incorrect, select the appropriate request queue by Referring to the Scheduling Foundation Course

3. Click **OK**
   - Request for Book Window Closes

The Request has now been put to the Request List Inquiry.

## 3 Access the Request List Inquiry


1. Click **Request List Inquiry**  within the toolbar
   - **Schedule Inquiry- Request List by Location** window displays

Within the Request List Inquiry, the Scheduling Clerk can do a variety of different activities to a Request. This can include monitoring the request list, cancelling a request, moving a request from one list to another, or completing the request into a confirmed date and time (Refer to the Scheduling Foundation Course) on how to complete the different variations.

There are different  Search Filters within the Request List Inquiry defined below:

| Fields | Description |
|---|---|
| Inquiry | A way to search by certain criteria (e.g, cancellations, requests) Note: Always Select Inquiries prefixed with Surgery |
| Request List Queues | Hold lists of appointment requests based on the type of appointment Note: Always Select Request List Queues prefixed with SN |
| Location Type | Type of Location. Note: Always Select Surgery |
| Location | Surgical Area |

Use the following information to complete the search window:

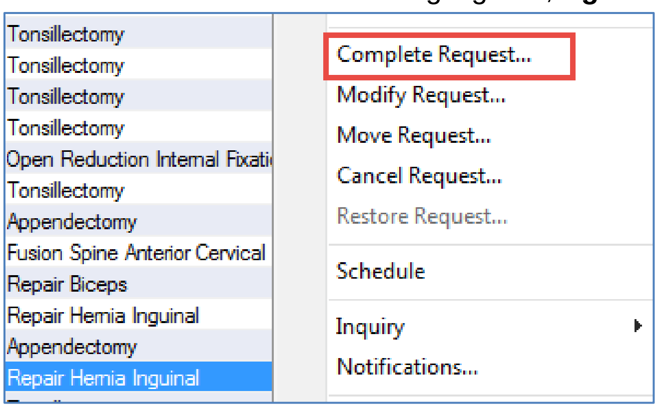
- **Inquiry** = *Surgery Case Request By Queue*
- **Request List Queues** = *SN - LGH Surgery Waitlist*
- **Location Type** = *Surgery*
- **Location** = *LGH Main OR*

2. Click **Find**
    - Search Window Populates
3. **Click** the Patient
    - Patient's row is highlighted

**Note**. When you locate your patient, their status within the Action Column should display as "Book". This indicates that your patient has been put to the request list for the first time. If the patient's status within the Action Column displays as "Reschedule", this indicates that your patient is a postponed patient (To be discussed further in Activity 1.9).

To complete a patient's request into the Scheduling Grid:

4. With the Patient's Row still highlighted, **right-click**.




5. Click **Complete Request** from the drop-down list
    - Appointment Attributes Window Displays
6. Click **OK**
7. Continue to complete the patient's request via **drag and drop** from the Work In progress window into the Scheduling Grid (Refer to the Scheduling Foundation Course).
8. **Note: If** necessary, **Select** Override to place the patient into the OR as per your data sheet.
9. Close the Request List Inquiry Window.
10. Click **Confirm**.
11. Click **OK**.

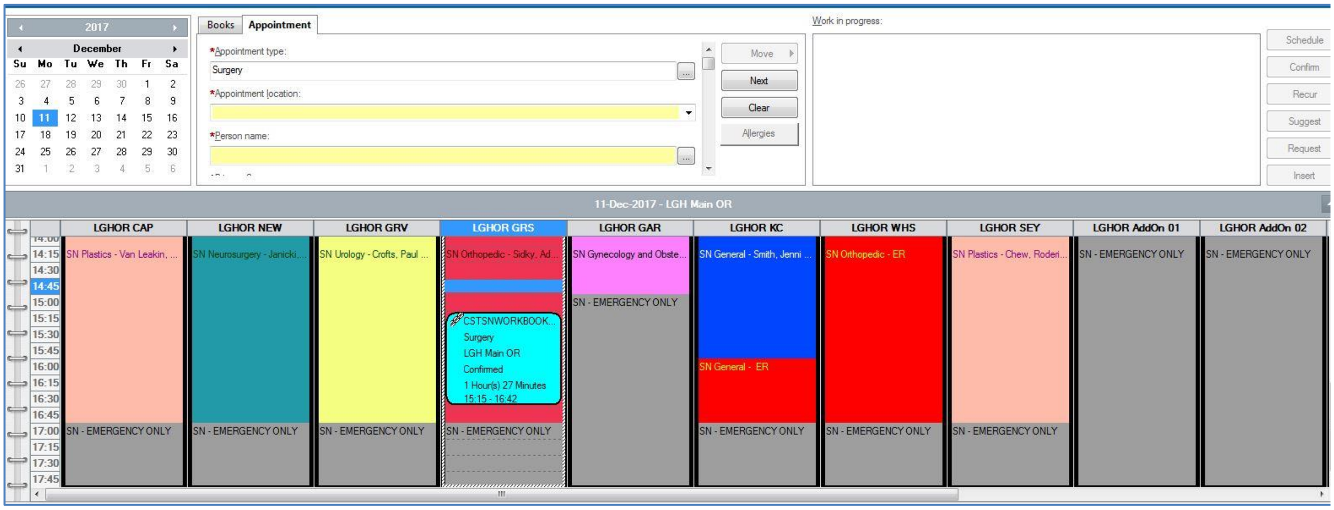
### Key Learning Points

- A patient's request within the Work In progress can be put into the Request list by selecting the Request button
- Access the Request List by selecting the Request List Inquiry Icon from the toolbar
- The Action Column within the request list indicates whether a patient has a new request "Book" or a postponed request "Reschedule"

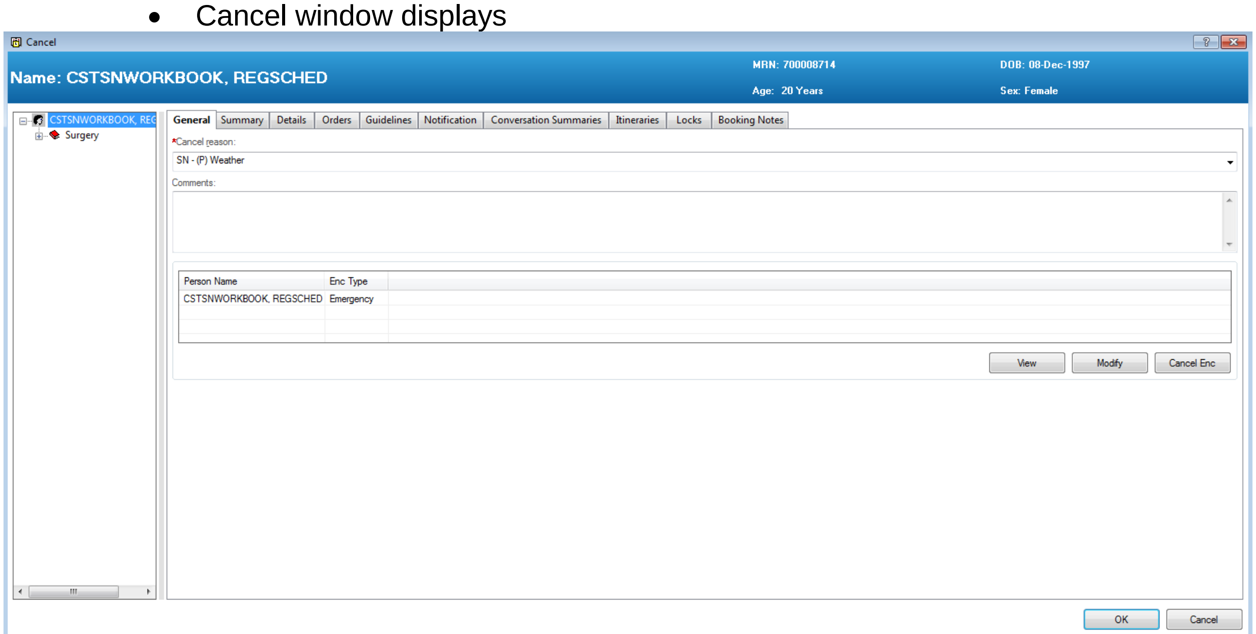
# Activity 2.3 – Cancel A Confirmed Appointment

1 Cancel a Patient’s Confirmed Surgical Appointment.

The functionality taught in this activity only relates to confirmed appointments. Confirmed appointments are colored blue within the scheduling grid (Refer to the Scheduling Foundation Course).




1. Right Click the Patient’s Confirmed appointment within the scheduling grid
2. Hover over **Actions** from the drop-down
3. Click **Cancel**
4. Since the Patient has a Linked Appointments Icon, the Linked appointments will Display (Refer to the Scheduling Foundation Course to learn more about Linked Appointments)
5. Click **OK**
   - Cancel window displays



Enter the true cancellation reason for the case as this removal reason will be sent down to the Surgical Patient Registry.

Only choose Surgery applicable Cancellation reasons will be prefixed with “SN- (R)” as shown below.

| Surgery Removal Codes | |
|---|---|
| SN - (R) Administrative Error | SN - (R) Patient Scheduled Elsewhere |
| SN - (R) Done as Emergency | SN - (R) Removed from WL by Hospital |
| SN - (R) Multiple Appt Date Refused | SN - (R) Removed from WL by Patient |
| SN - (R) Patient Deceased | SN - (R) Removed from WL by Surgeon |

6. Select ***SN- (R) Done as Emergency*** from the Cancel Reason field
7. Click **OK**
    - Patient’s Appointment will display as red on the scheduling grid

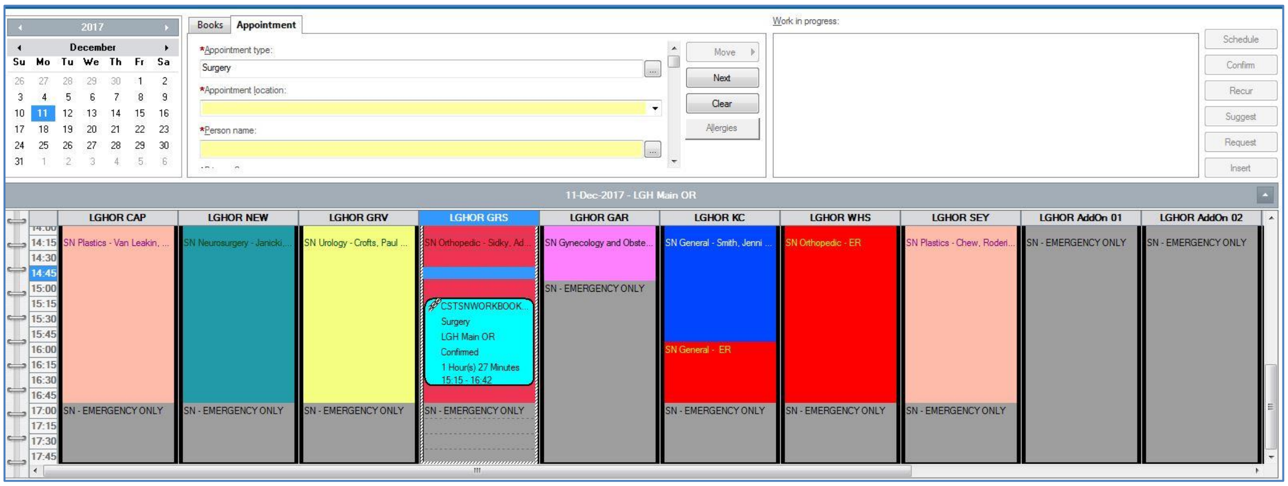
## Key Learning Points

- The Cancel functionality within the scheduling grid only applies to Confirmed Appointments
- Surgery Applicable Cancellation reasons will be prefixed with “SN- (R)”

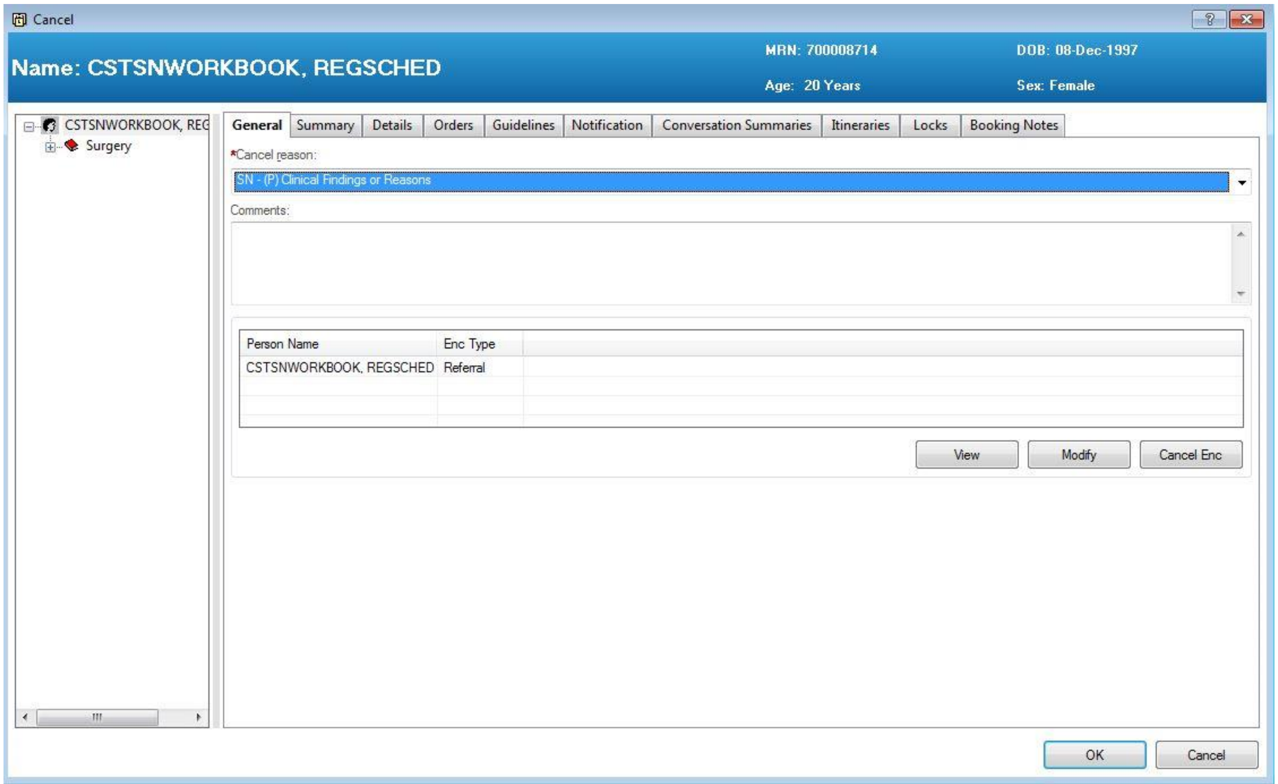
# Activity 2.4 – Postpone a Confirmed Appointment

1

If a patient cannot undergo/attend their confirmed appointment, the appointment will need to be waitlisted. To do this the Scheduling Clerk will first need to cancel the appointment off of the scheduling grid, and then reschedule the appointment into the Request List. This process is known as postponing a patient's surgical appointment.




1. Right click the Patient's confirmed appointment within the scheduling grid
2. Hover over **Actions** in the drop-down
3. Click **Cancel…**
   - Since the Patient has a Linked Appointments Icon, the Linked appointments will Display (Refer to the Scheduling Foundation Course to learn more about Linked Appointments)
4. Click **OK**
   - Cancel Window Displays

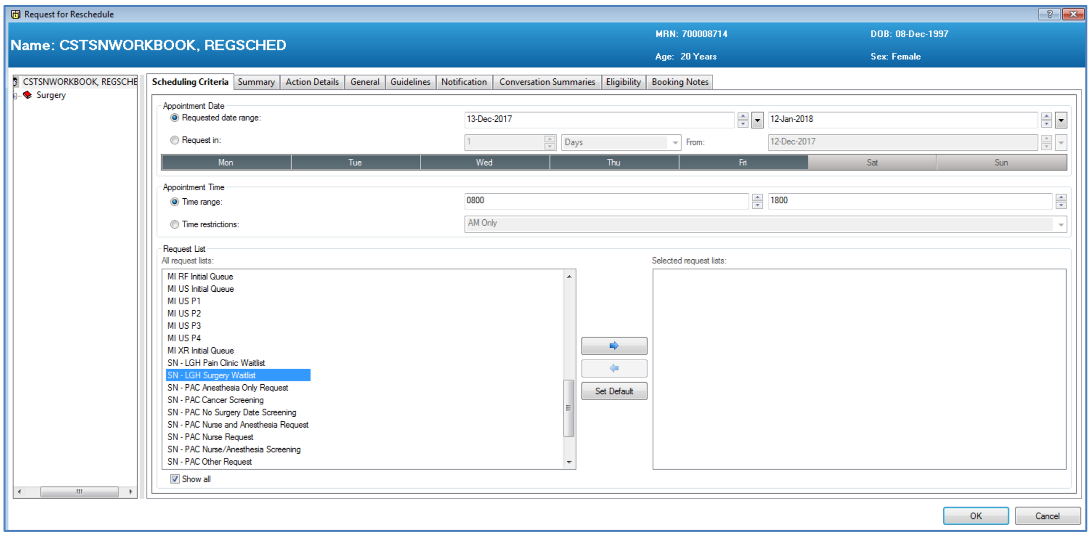



Enter the true Postponement reason for the case as this will be sent down to the Surgical Patient Registry.

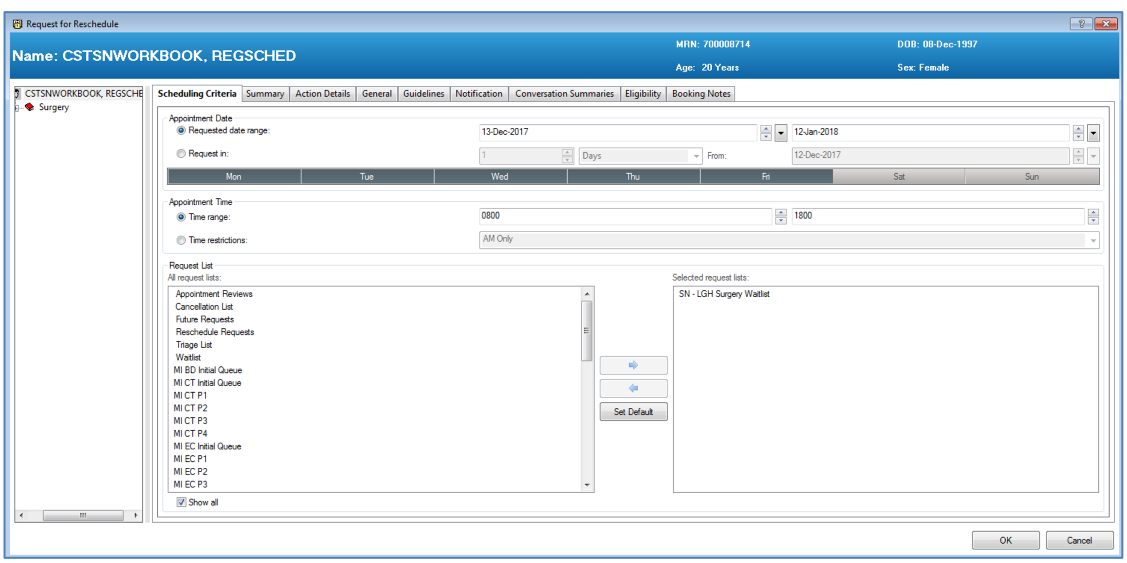
Only choose Surgery applicable Postponement reasons prefixed with “SN- (P)” as seen below:

| Surgery Postponement Codes | |
|---|---|
| SN - (P) Anesthesia Unavailable | SN - (P) Surgeon Unavailable |
| SN - (P) Bumped by Emerg | SN - (P) Transportation/No Ride |
| SN - (P) Case Overrun | SN - (P) Unit Bed Unavailable |
| SN - (P) Clinical Findings or Reasons | SN - (P) Weather |
| SN - (P) Code Triage | SN - (P) Surgeon Unavailable |
| SN - (P) Disaster Code | SN - (P) Transportation/No Ride |
| SN - (P) Equipment Unavailable | SN - (P) Unit Bed Unavailable |
| SN - (P) ICU Bed Unavailable | SN - (P) Weather |
| SN - (P) Job Action | |
| SN - (P) Move From Prev Day Add-On List | |
| SN - (P) No Show | |
| SN - (P) Nurse Unavailable | |
| SN - (P) Patient Ate or Drank | |
| SN - (P) Patient Cancelled | |
| SN - (P) Patient No Consent | |
| SN - (P) Patient Refused | |
| SN - (P) Patient Too Sick to Come In | |
| SN - (P) Patient Unavailable | |
| SN - (P) Postponed by Surgeon | |
| SN - (P) Preparation Not Complete | |

5. Select ***SN- ( P) Clinical Findings or Reasons*** from the Cancel Reason field
6. Click **OK**
   - Patient's Appointment will display as RED and fall to the bottom of the scheduling grid
7. Right click the Patient's Cancelled appointment (colored RED) within the scheduling grid
8. Hover over **Actions** from the drop down
9. Hover over **Request** from the drop down
10. Click **Reschedule**
    - Request for Reschedule window displays




11. Click the Show All Checkbox on the bottom left hand corner if not already selected.
12. Click ***SN – LGH Surgery Waitlist*** from the All Request lists window
13. Click the Blue Arrow 




14. Click **OK**

The Appointment is now postponed. For more information (Refer to the Scheduling Foundation Course)

## Key Learning Points

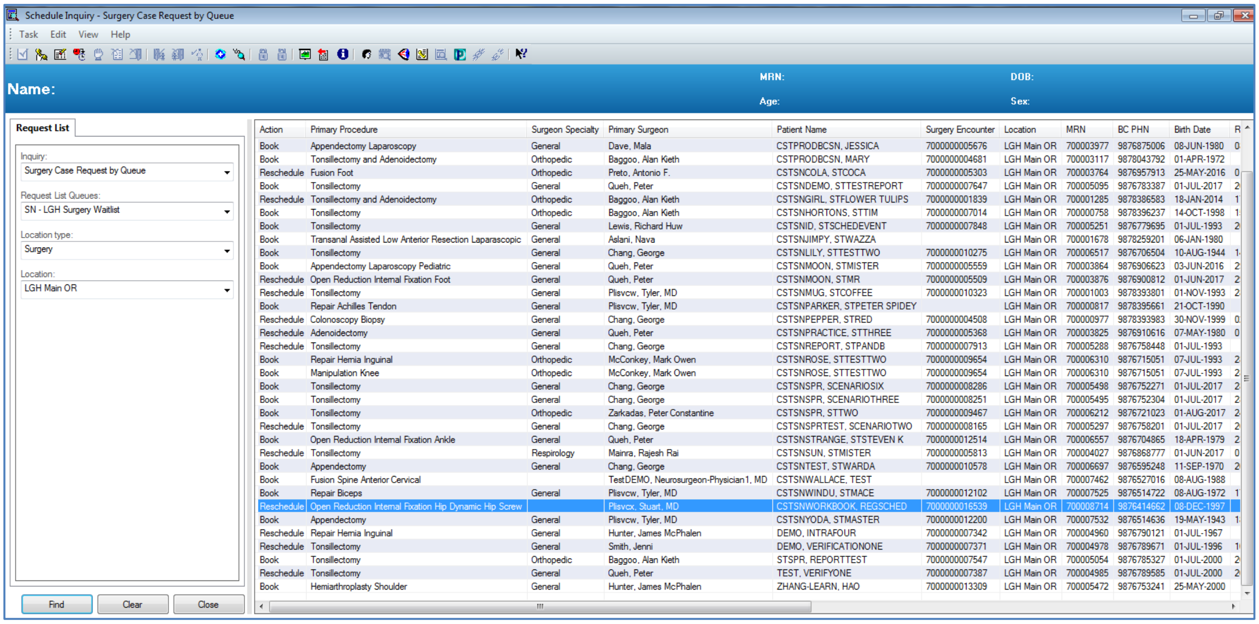
- The Postpone functionality within the scheduling grid only applies to Confirmed Appointments
- To Postpone an appointment: First Cancel the Confirmed Appointment. Then Reschedule it to the Request List
- Surgery applicable Postponement reasons are prefixed with “SN- (P)”

# Activity 2.5 – Cancel Request

DATASHEET

## 1 Cancel a patient's request from the Request List Inquiry

1. Click **Request List Inquiry** within the toolbar




Use the following information to complete the search window:

2. **Inquiry** = *Surgery Case Request By Queue*
3. **Request List Queues** = *SN - LGH Surgery Waitlist*
4. **Location Type** = *Surgery*
5. **Location** = *LGH Main OR*
6. Click **Find**
7. Review that the Action Column in the Patient's Row displays as either "Book" or "Reschedule"

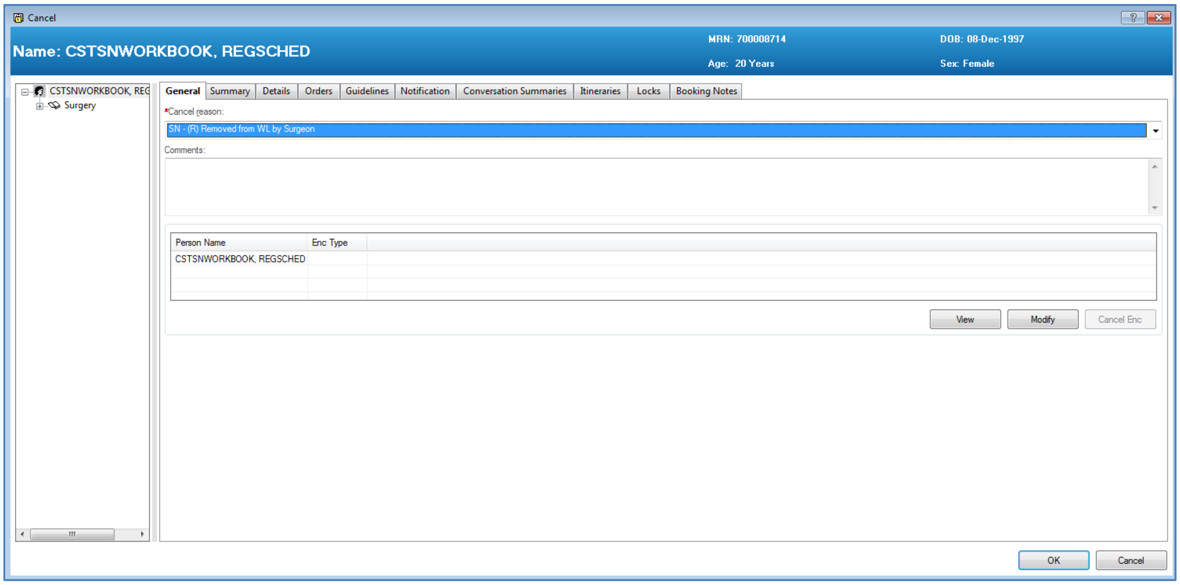
When you locate your patient, their status within the Action Column should display as "Book" or "Reschedule". "Book" indicates that your patient has been put to the request list for the first time. If the patient's status within the Action Column displays as "Reschedule", this indicates that your patient is a postponed patient.

**Note:** It is important to differentiate the two as both actions, especially when cancelling them off the request list. If the proper method is not used, the cancellation reason will be sent down to the Surgical Patient Registry incorrectly.

## 2 Action Column Displays as "Book"

| | | | | |
|---|---|---|---|---|
| Book | Repair Hernia Inguinal | General | Plisvcw, Tyler, MD | CSTSNWORKBOOK, REGSCHED |
| Book | Appendectomy | General | Plisvcw, Tyler, MD | CSTSNYODA, STMASTER |

1. Right Click the Patient's Row
2. Click **Cancel Request**
    - Cancel Window Displays

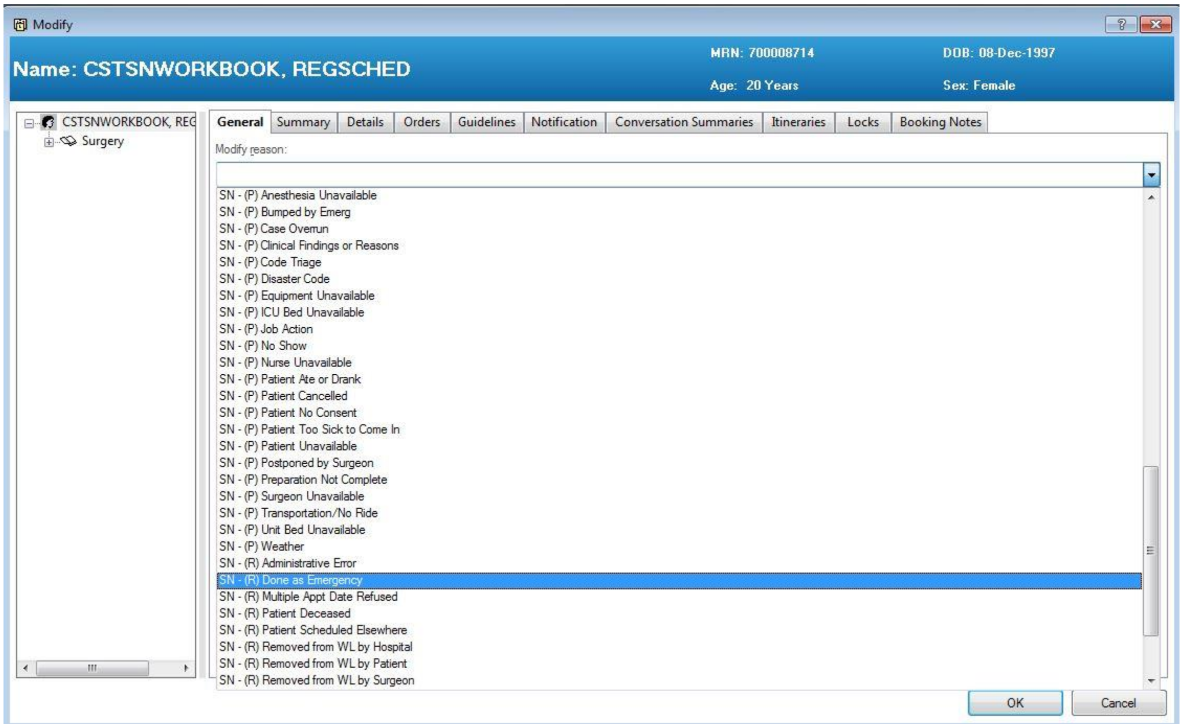



3. Click ***SN – (R) Removed From WL By Surgeon***
4. Click **OK**

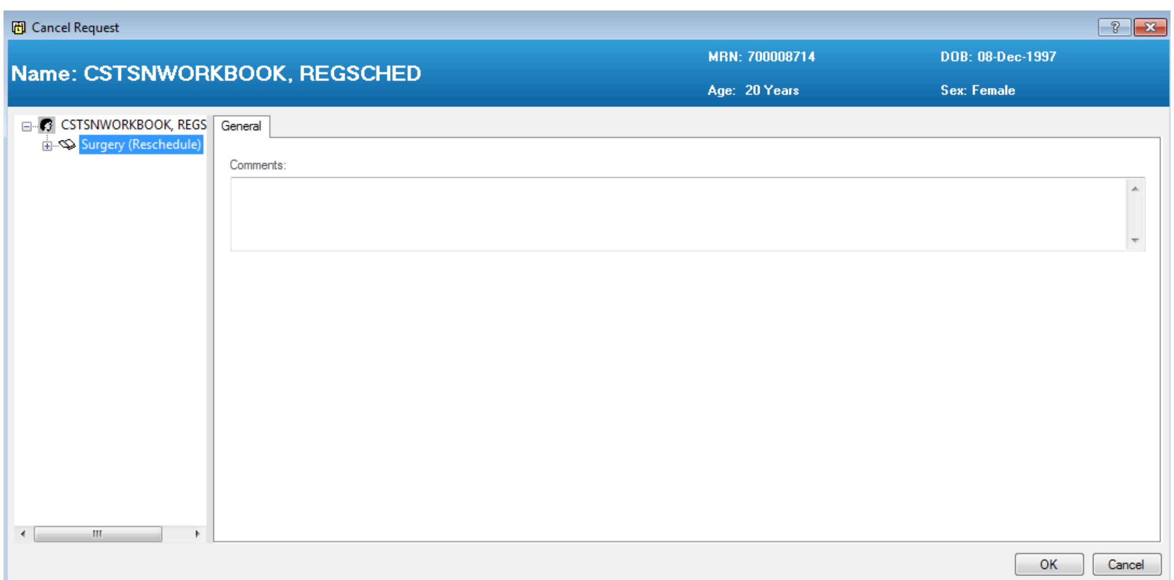
## 3 Action Column Displays as "Reschedule"

| | | | | | |
|---|---|---|---|---|---|
| Book | Repair Biceps | General | Plisvcw, Tyler, MD | CSTSNWINDU, STMACE | 7000000012102 |
| Reschedule | Open Reduction Internal Fixation Hip Dynamic Hip Screw | | Plisvcx, Stuart, MD | CSTSNWORKBOOK, REGSCHED | 7000000016539 |
| Book | Appendectomy | General | Plisvcw, Tyler, MD | CSTSNYODA, STMASTER | 7000000012200 |

1. Right Click the Patient's Row
2. Click **Modify**
    - Linked Appointment Window Displays
    - Click **OK**
    - Existing Request Window Displays
    - Click **OK**
    - Modify Window Displays




3. Click the ***SN – (R) Done as Emergency***
4. Click **OK**
5. Right click the Patient's Row
6. Click **Cancel Request**
   - Cancel Window Displays




7. Click **OK**
8. Close the Request List Inquiry

## Key Learning Points

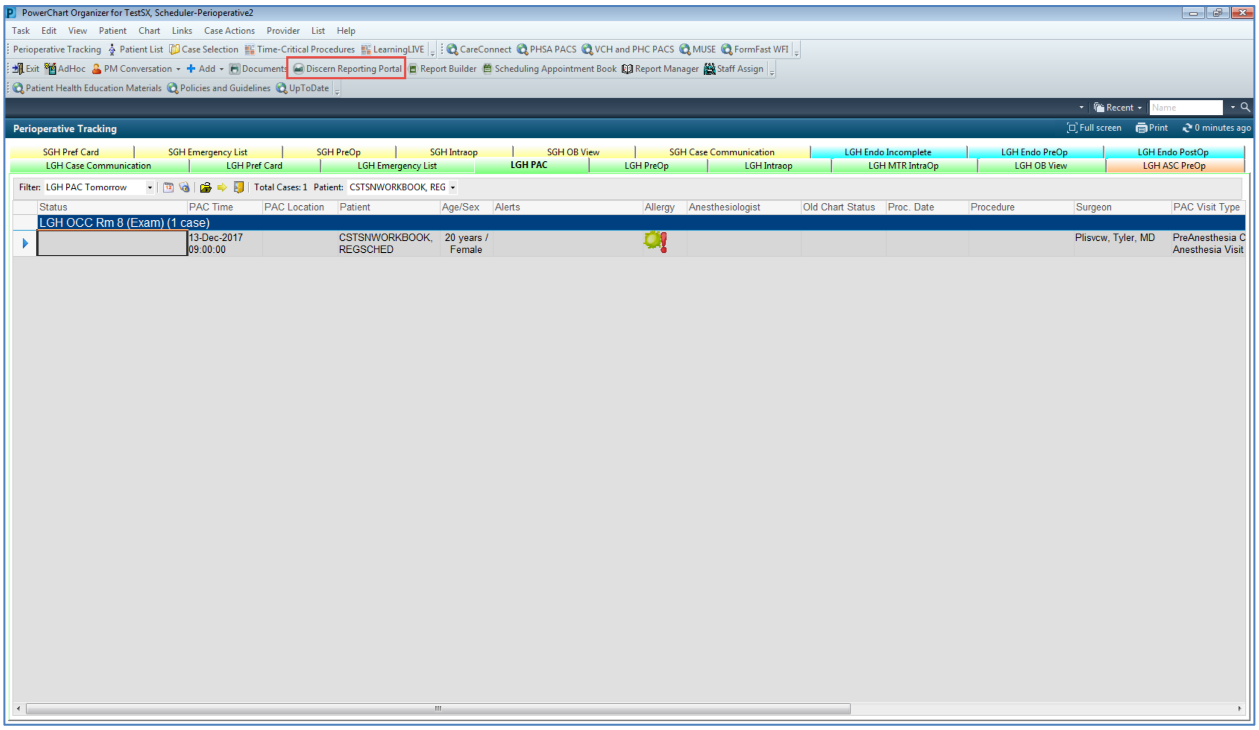
- Review the Action Column to verify if the request displays “Book” for a new appointment or “Reschedule” for a postponed appointment
- If the request displays as “Book”:  Cancel the Request and enter the cancellation reason
- If the request displays as “Reschedule”: Modify the Request to enter the cancellation reason, and then Cancel the Request

# Activity 2.6 – Discern Reporting Portal

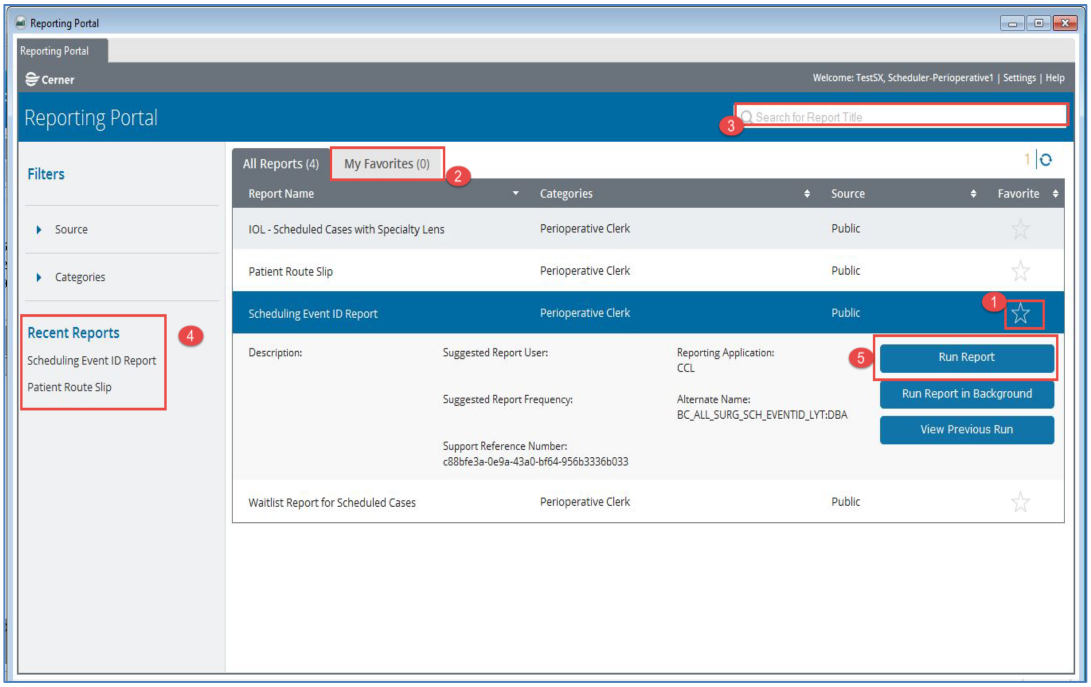
1 The Scheduling Clerk will need to run, view, and print reports.

Reports are accessed through **Discern Reporting Portal** in Powerchart.

Login to PowerChart to begin the activity.




1. Click  Discern Reporting Portal
    - Discern Reporting Portal will display



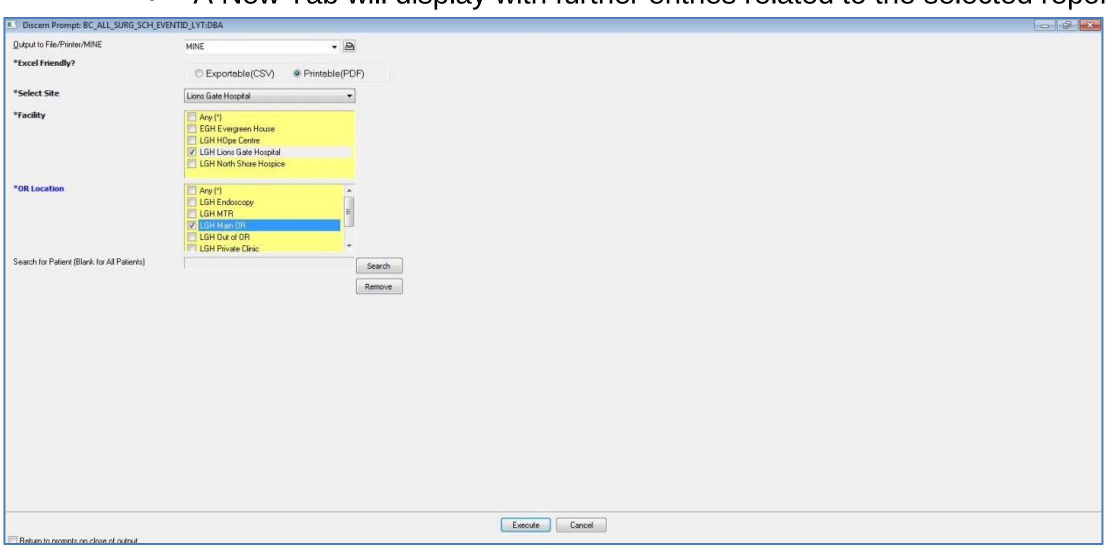

1. Favourite a report by clicking the star icon
2. Click the My Favourites Tab to view favourited reports
3. Search for reports in this window
4. Recently accessed reports display here
5. Run reports by selecting the Run Report button

**Note:** The Reporting Portal will only display reports that your position has access to view.

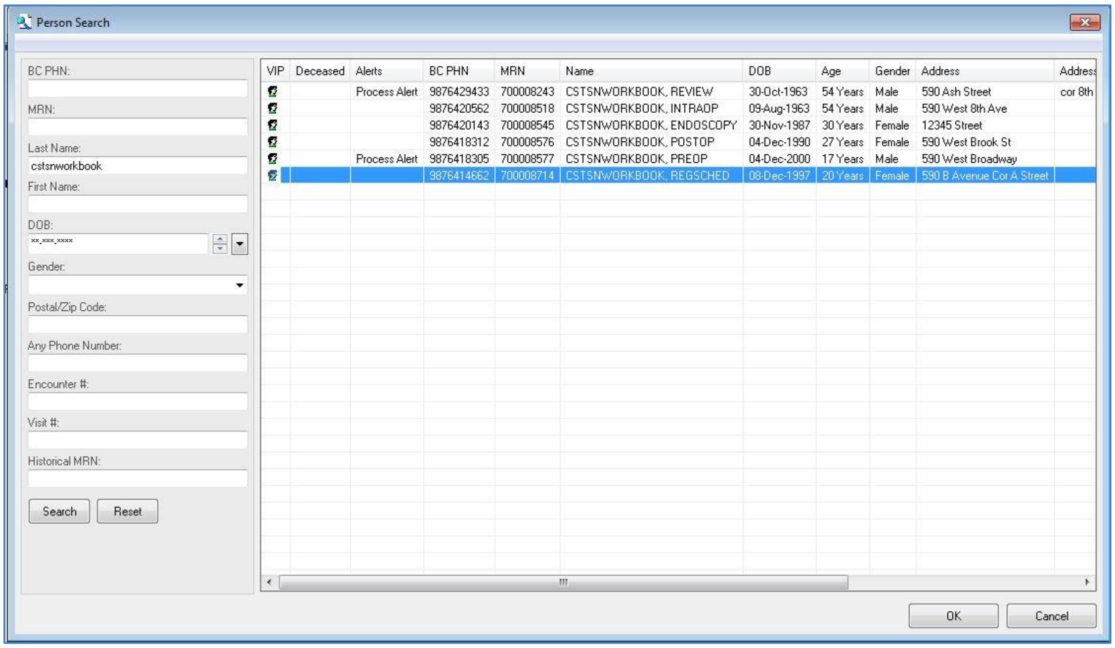
2

Access the Schedule Event ID Report

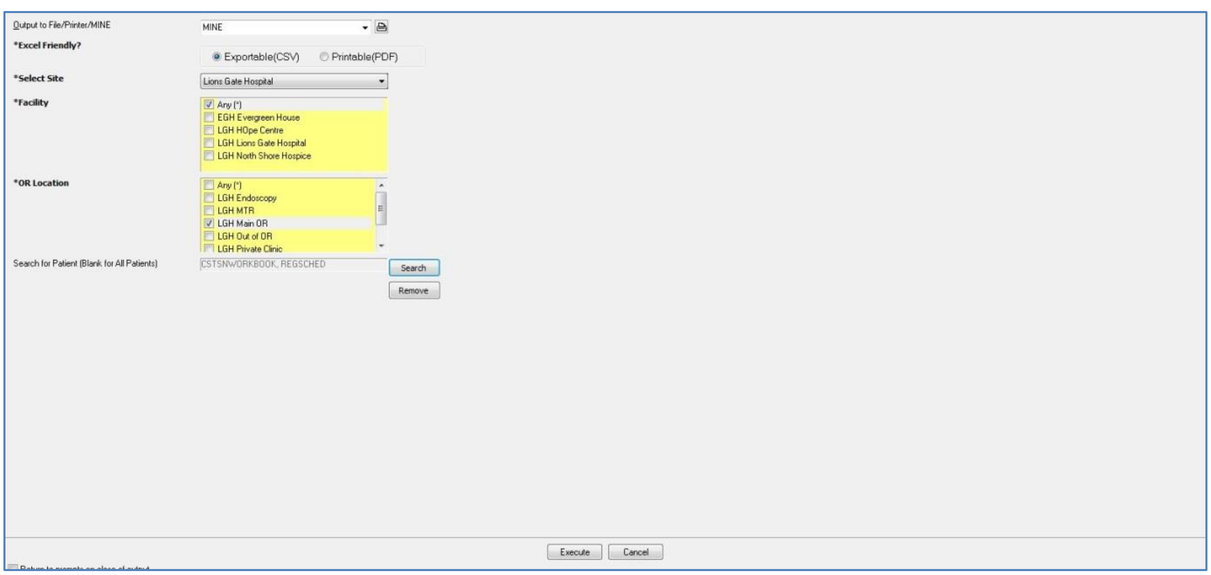
1. Click the ***Schedule Event ID*** Report to highlight the row
2. Click **Run Report**
    - A New Tab will display with further entries related to the selected report



3. Click the Maximize  button in the toolbar
   Use the following information to complete fields:
   - ***Excel Friendly?** = Printable (PDF)
   - ***Select Site** = LGH Lions Gate Hospital
   - ***Facility** = LGH Lions Gate Hospital
   - ***OR Location**= LGH Main OR
4. Click **Search** in the Search for Patient Field




   - Person Search window displays
5. Search for the patient
6. Select the corresponding patient record from Person Search window
7. Click **OK**




8. Click **Execute**
   - Report will display

SCHEDULING EVENT ID REPORT

Site: LGH Lions Gate; OR Location: LGH Main OR

Submitted By: TestSX, Scheduler-Perioperative

Submitted On: 06-MAR-2018 09:43

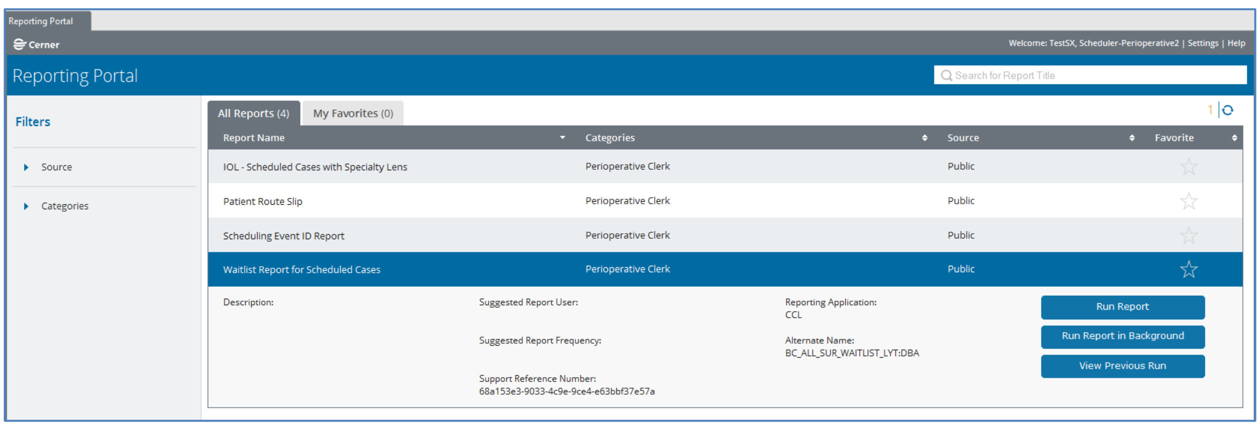
| Patient Name | Birth Date | MRN | BC PHN |
|---|---|---|---|
| Surgery Scheduling - CheckedIn | 16-JAN-1965 | 760000596 | 10760000596 |
| Drew | | | |

| Scheduling Event ID | Original Appt Date and Time | Cancellation Date Time | Primary Procedure | Primary Surgeon | Surgery Encounter | Location | Priority | Appointment Type |
|---|---|---|---|---|---|---|---|---|
| 4409821 | 06-03-2018 14:10 | | Arthroplasty Knee | Plisvcw, Tyler, MD | 7600000000596 | LGH Main OR | Elective | Surgery |

** * End of Report * **

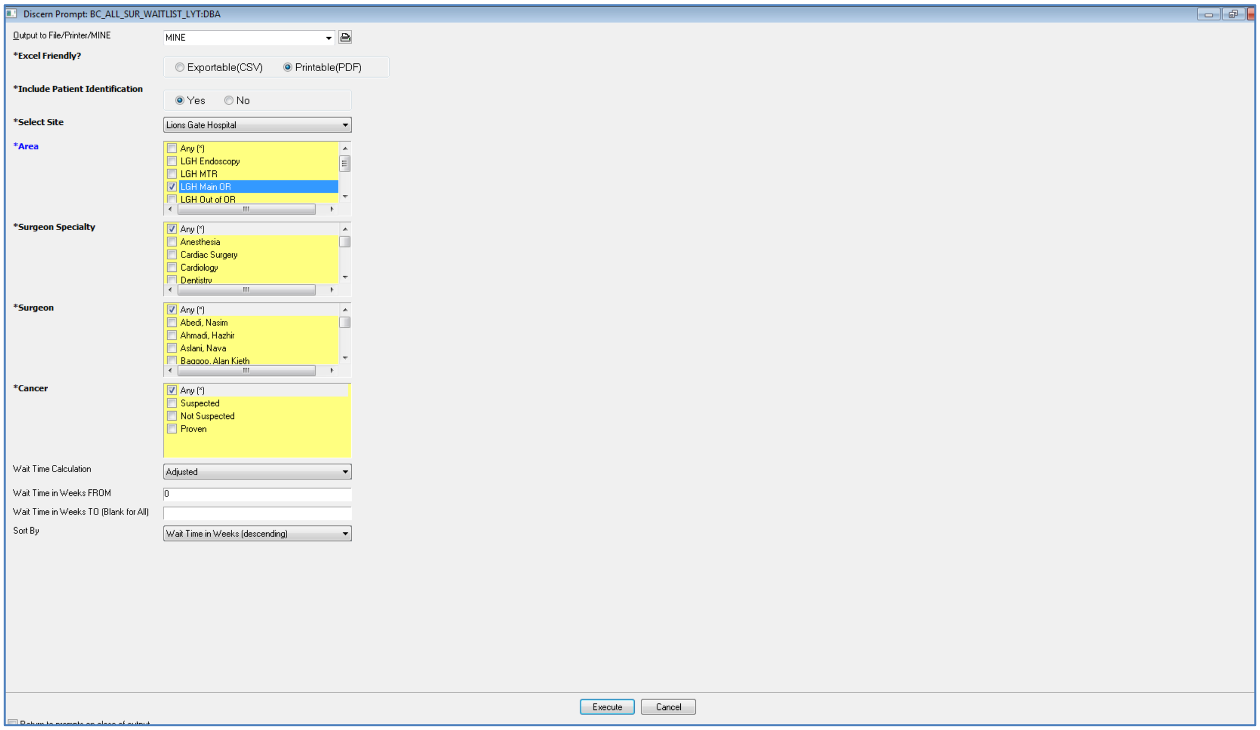
9. Click to close the report

## 3 Accessing Waitlist Report for Scheduled Cases




10. Click ***Waitlist Report for Scheduled Cases*** Report to highlight the row
11. Click **Run Report**

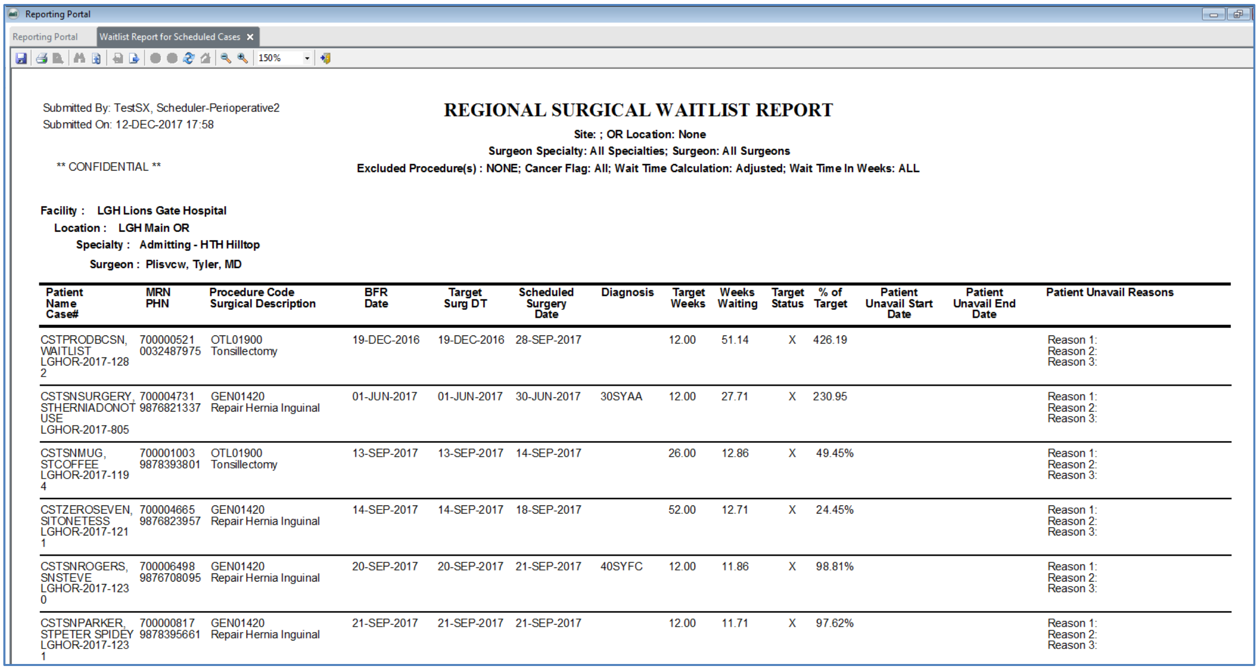
- A New Tab will display with further entries related to the selected report




Use the following information to complete fields:

- ***Excel Friendly?** = Printable (PDF)
- ***Select Site =** LGH Lions Gate Hospital
- ***Area =** LGH Main OR
- ***Surgeon Specialty** = Any(*)
- ***Surgeon** = Any(*)
- ***Cancer** = Any(*)
- ***Wait Time Calculation** = Adjusted
- ***Sort by**= Wait Time in Weeks (descending)

12. Click **Execute**



Reporting Portal

Reporting Portal | Waitlist Report for Scheduled Cases

150%

Submitted By: TestSX, Scheduler-Perioperative2
Submitted On: 12-DEC-2017 17:58

** CONFIDENTIAL **

**REGIONAL SURGICAL WAITLIST REPORT**

**Site: ; OR Location: None**
**Surgeon Specialty: All Specialties; Surgeon: All Surgeons**
**Excluded Procedure(s) : NONE; Cancer Flag: All; Wait Time Calculation: Adjusted; Wait Time In Weeks: ALL**

**Facility : LGH Lions Gate Hospital**
**Location : LGH Main OR**
**Specialty : Admitting - HTH Hilltop**
**Surgeon : Plisvcw, Tyler, MD**

| Patient Name Case# | MRN PHN | Procedure Code Surgical Description | BFR Date | Target Surg DT | Scheduled Surgery Date | Diagnosis | Target Weeks | Weeks Waiting | Target Status | % of Target | Patient Unavail Start Date | Patient Unavail End Date | Patient Unavail Reasons |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| CSTPRODBCSN, WAITLIST LGHOR-2017-128 2 | 700000521 0032487975 | OTL01900 Tonsillectomy | 19-DEC-2016 | 19-DEC-2016 | 28-SEP-2017 | | 12.00 | 51.14 | X | 426.19 | | | Reason 1: Reason 2: Reason 3: |
| CSTSNSURGERY, STHERNIADONOT USE LGHOR-2017-805 | 700004731 9876821337 | GEN01420 Repair Hernia Inguinal | 01-JUN-2017 | 01-JUN-2017 | 30-JUN-2017 | 30SYAA | 12.00 | 27.71 | X | 230.95 | | | Reason 1: Reason 2: Reason 3: |
| CSTSNMUG, STCOFFEE LGHOR-2017-119 4 | 700001003 9878393801 | OTL01900 Tonsillectomy | 13-SEP-2017 | 13-SEP-2017 | 14-SEP-2017 | | 26.00 | 12.86 | X | 49.45% | | | Reason 1: Reason 2: Reason 3: |
| CSTZEROSEVEN, SITONETESS LGHOR-2017-121 1 | 700004665 9876823957 | GEN01420 Repair Hernia Inguinal | 14-SEP-2017 | 14-SEP-2017 | 18-SEP-2017 | | 52.00 | 12.71 | X | 24.45% | | | Reason 1: Reason 2: Reason 3: |
| CSTSNROGERS, SNSTEVE LGHOR-2017-123 0 | 700006498 9876708095 | GEN01420 Repair Hernia Inguinal | 20-SEP-2017 | 20-SEP-2017 | 21-SEP-2017 | 40SYFC | 12.00 | 11.86 | X | 98.81% | | | Reason 1: Reason 2: Reason 3: |
| CSTSNPARKER, STPETER SPIDEY LGHOR-2017-123 1 | 700000817 9878395661 | GEN01420 Repair Hernia Inguinal | 21-SEP-2017 | 21-SEP-2017 | 21-SEP-2017 | | 12.00 | 11.71 | X | 97.62% | | | Reason 1: Reason 2: Reason 3: |

13. Click to close the report

## Key Learning Points

- A quick way to access Discern Report Portal is through the icon in Powerchart
- Discern Reporting Portal is a hub for Reports
- Access to reports are restricted by your position

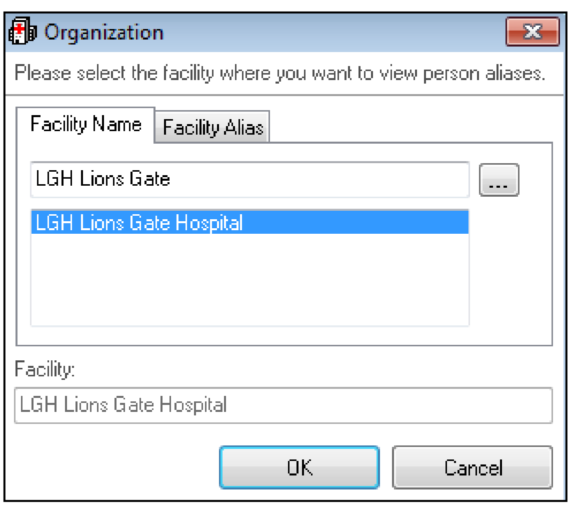
# Activity 2.7 – Interfacility Transfer

1

For a transfer of one facility to the next (e.g, LGH to SGH) the Scheduling Clerk must create a new Surgery Waitlist encounter for the new facility

Clerk reopens PM Office again to convert the Encounter. Click **Access Management Office** from the Task Bar.


1. Double Click **Surgery Waitlist** under the conversation
    a. Person Search window displays
2. Search for the patient using the CIS and EMPI search criteria
3. Select the corresponding patient record from *Person Search* window
4. Click **Add Encounter**




5. Enter the corresponding facility = **SGH Squamish General Hospital**
6. Click **OK**

7. Click **Close** to close the External MPI window
8. Surgery Waitlist window displays
9. On the Patient Information tab, in the **Preferred Phone** field, select Home Phone Number.
10. On the Encounter Information tab, use the following information to complete the patient's encounter:

    - **Encounter Type** = *Pre-Day Surgery*
    - **Medical Service** = *General Surgery*
    - **Reason for Visit**: *Surgery*
    - **Building** = *SGH Squamish General Hospital*
    - **Unit/Clinic** = *SGH SurgWaitLst*
    - **Referring Provider** = *Plisvcx, Stuart*
    - **Attending Provider** = *Plisvcw, Tyler*
    - **Estimated Arrival Date** = *<Christmas Day>*
    - **Estimated Arrival Time** = *12:00*

11. Click the **Insurance** Tab and use the following information below to complete the necessary fields (if Insurance is not previously populated)
    a. Click Search for Health Plan
    b. Enter in the **Search for health plan** = *BC*
    c. Select *BC Resident MSP PHN – MSP* from the result list
    d. Select *SEE CARD,, British Columbia* from the **BC Resident MSP PHN Contact Information**
    e. Click **OK**
    f. If the **Status In Canada** drop-down is Mandatory, Select Canadian Citizen
        i. Residency > 6 Months? = <Yes>
        ii. Document Type = <Birth Certificate>
        iii. Document Number = <XX00001-10>

12. Click the **Waitlist Info** tab and use the following information below to complete the necessary fields
    - **Referral Date** = *<Date>*
    - **First Consult Date** = *<Date>*
    - **Ready to Treat Date** = *<Date>*
    - **Booking Package Rec'd Date** = *<Date>*
    - **Admit Day Prior** = *0*
    - **Cancer?** = *Not Suspected*
14. Click **Complete**

    - Encounter Number and Visit Id are displayed
    - Click **OK**

2 To transfer a Confirmed Appointment to another facility

Launch Schapptbook

1. Drag and Drop the Confirmed Appointment into the Work In progress Window (Refer to the Scheduling Foundation Course)
    - If the Linked Appointment window displays, click **OK**
2. The Existing Encounter window displays.
3. Click **No.** If you see another Existing Encounter window, click **OK.**

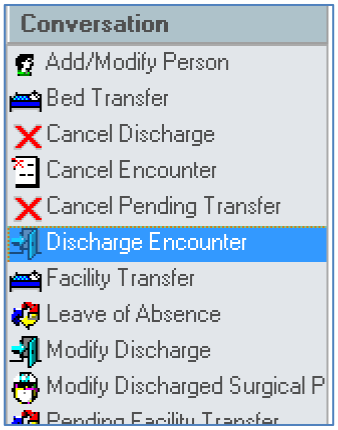
   **Note:** Do not retain the Existing Encounter as it is now associated with the old site. We will attach the new encounter created when confirming the appointment
4. Appointment Attributes Window Displays
5. Click **OK**
6. **Select** <SGH Main OR> in the Appointment Location field within the Scheduling Accept Format
7. Click **Move**
    - Appointment Attributes Window Displays
8. Click **OK**
9. Drag and Drop Appointment from the Work In progress window to the Scheduling Appointment Grid (Refer to the Scheduling Foundation Course)
10. Click **Confirm**.
11. Click **OK**.
12. **Select** the previously made SGH Encounter and click **OK**
    - Reschedule Window Displays

Enter the true Reschedule reason for the case as this will be sent down to the Surgical Patient Registry. The Postponement reasons will be prefixed with “SN- (P)”

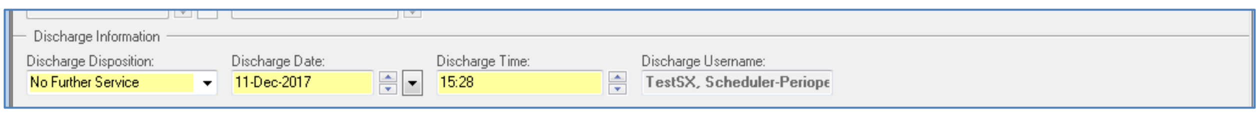
13. **Select** *<SN- ( P) Clinical Findings or Reasons>*
14. Click **OK**

3 Discharge the Encounter of the Previous Facility

Clerk reopens PM Office again to discharge the Encounter. Click **Access Management Office** from the Task Bar.




1. Double Click **Discharge Encounter** under the conversation
    - Person Search window displays
2. Search for the patient using the CIS and EMPI search criteria
3. Select the corresponding patient record from *Person Search* window
4. Select the previous Encounter where Unit/Clinic Column displays as *LGH SurgeryWait*List
5. Click **OK**
6. Discharge Encounter window displays




Use the following information to complete:

- **Discharge Disposition** = *No Further Service*
- **Discharge Date =** *<Enter Today's Date>*
- **Discharge Time =** *<Enter Current Time>*

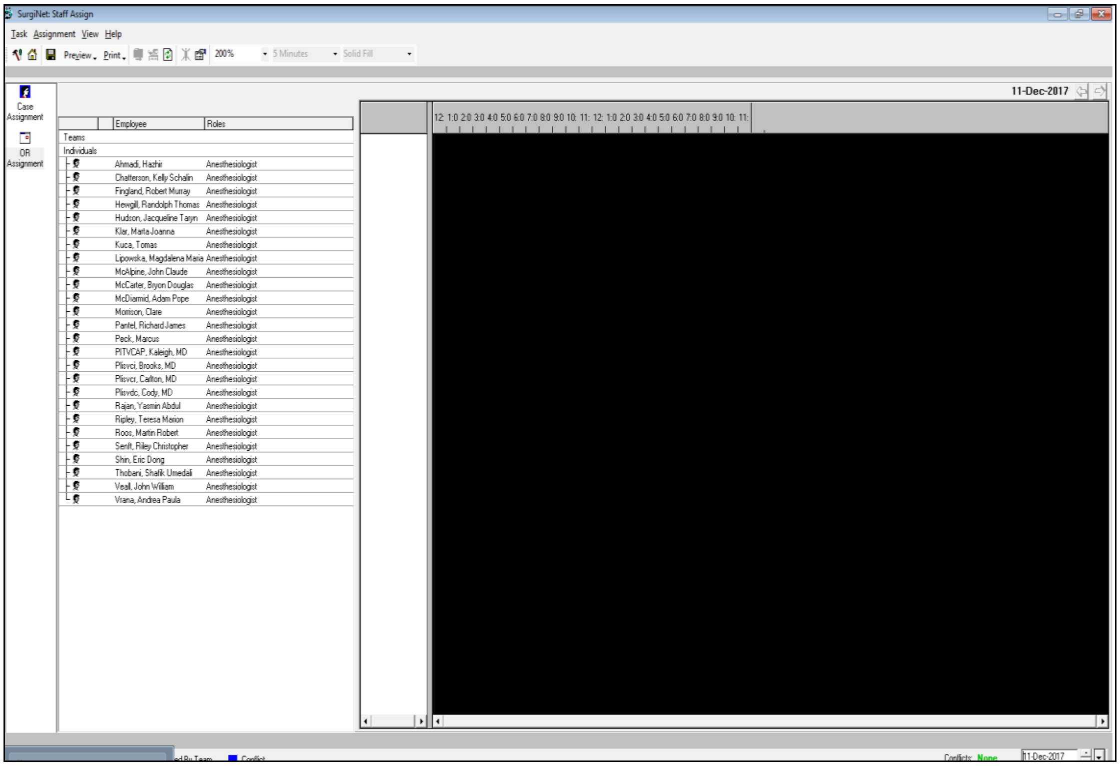
7. Click **Complete**

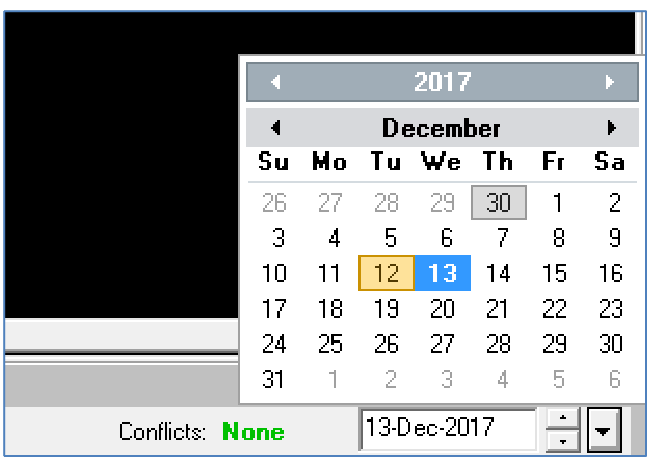
## Key Learning Points

- Create one encounter per facility when completing a Facility Transfer
- Discharge the Previous Encounter's Facility

# Activity 2.8 – Staff Assign

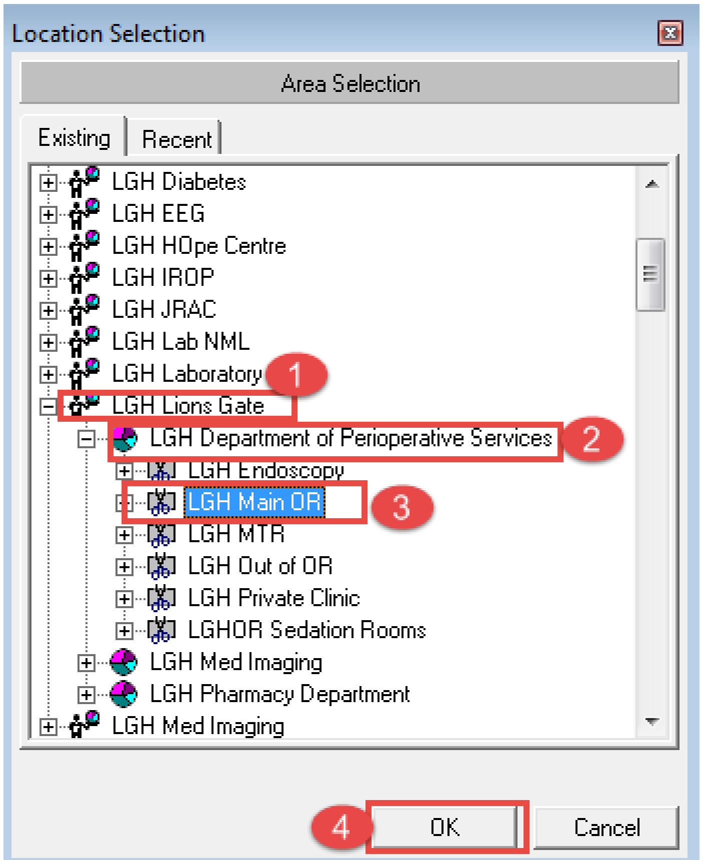
1 This application can be found in PowerChart, and is used to assign an Anesthetist to an OR Location which will also appear on the Surgical Slate.



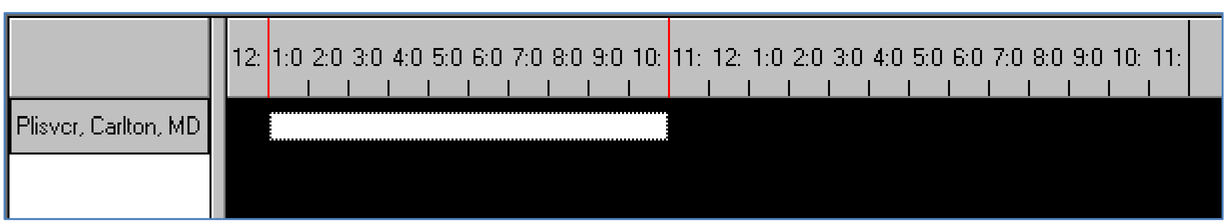

1. Click the **Staff Assign** button.
2. Click the Arrow Next to the Date on the Bottom Right Hand Corner
3. Click **the date** one week from today.
4. Click **Change Surgery Area** Icon from the top Toolbar

- Location Selection Window Displays

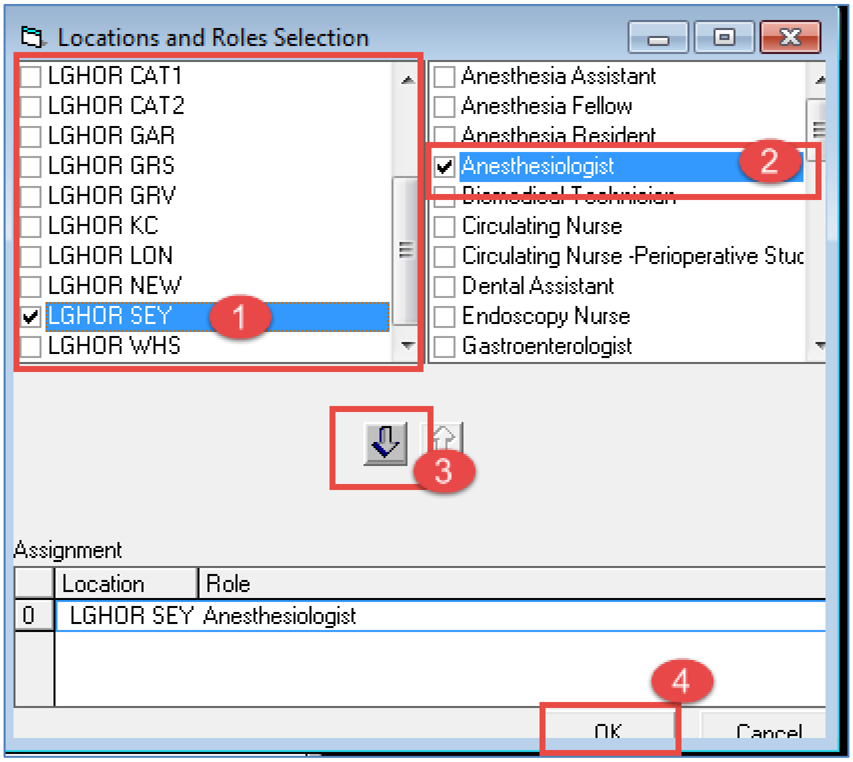



5. Click the ⊞ to expand LGH Lions Gate
6. Click the ⊞ to expand LGH Department of Perioperative Services
7. Select **LGH Main OR**
8. Click **OK**
    - Window on the left displays Schedulable Anesthetist Resources

9. Click the Anesthetist
    - Anesthetist Name will populate on the right hand window



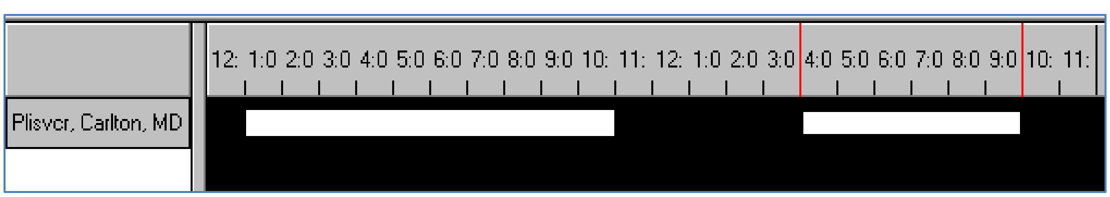

10. Move the cursor to the start time, then click and drag within the White Lines fields from <1:0 to 10:0> to schedule the Anesthetist for an allotted Time
    - Locations and Roles Selection Window Display



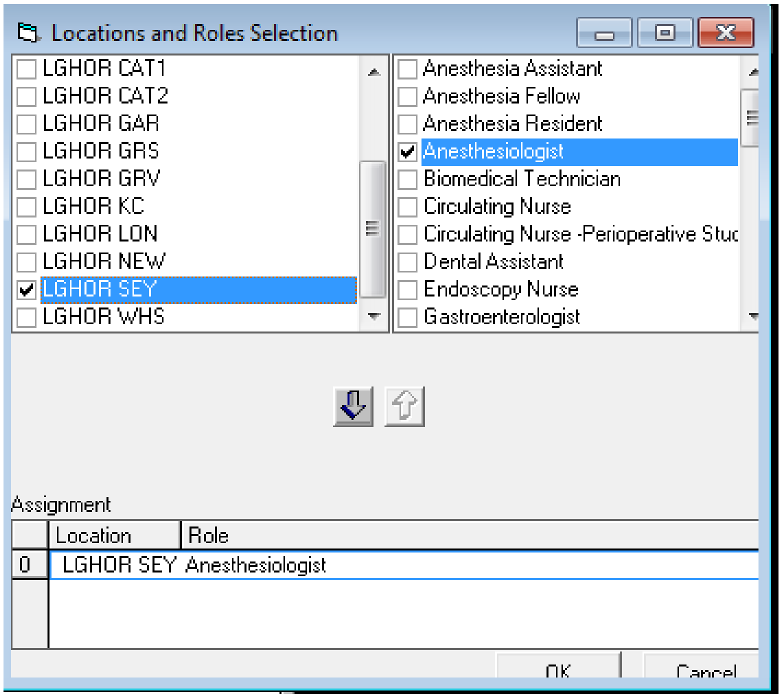

11. Click the Location <LGHOR SEY> in the window to the left
12. Click <Anesthesiologist> in the window to the right
13. Click the down arrow 
14. Click **OK**
15. 

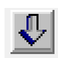
16. Verify Conflicts Display as None
17. Click Save  in the Toolbar

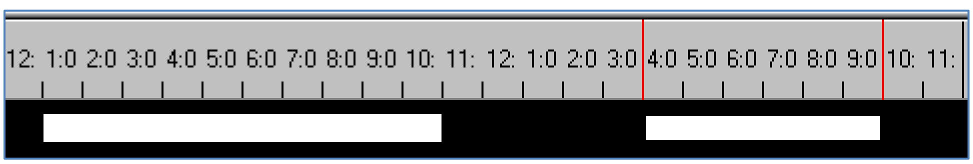
2



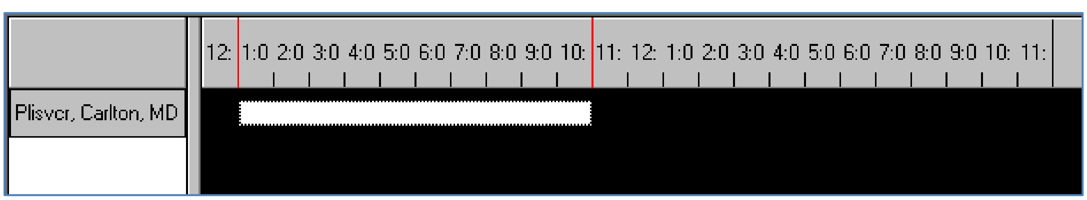

1. Click and drag Within the White Lines fields from <4.0 to 9.0> to schedule the Anesthetist for a second time allotment
2. The Locations and Roles Selection window display




3. Click the Location <LGHOR SEY> in the window to the left
4. Click <Anesthesiologist> in the window to the right
5. Click the down arrow 
6. Click **OK**




7. Click the white bar between <4:00 to 9:00>  to have it highlight in RED
8. Click **Delete Assignment**  in the toolbar
   - Allotted time is removed




## Key Learning Points

- Use Staff Assign to assign an Anesthetist as a resource to an OR Location
- Delete a Resource by selecting the Delete Assignment icon within the toolbar

# SCENARIO 3 – OR UNIT CLERK

**Learning Objectives**

At the end of this Scenario, you will be able to:

- Booking an Emergency Appointment
- Bumping Elective Appointments
- Booking Time Critical Procedure Appointment
- Reschedule Elective to Rapid

## Overview

This work package includes Surgery related Registration and Scheduling specific supplementary material, to be learned in addition to the Scheduling Foundation Course and Registration Foundation Course.

To complete the activities within this workbook, one must successfully have completed a base learning prior in:

- Request Lists (Scheduling Foundation Course)
- Appointment Scheduling (Scheduling Foundation Course)
- Referrals (Registration Foundation Course)

# Activity 3.1 – Book an Emergency Appointment

DATASHEET

1 Login to Schapptbook to launch the Scheduling Appointment Book

To select an Appointment type:

1. Click the **Appointment** Tab in Schapptbook
2. Enter **Surgery** in the Appointment Type field
3. Click the Ellipsis (...) icon next to the **Appointment Type** field
    - **Appointment Type Help** window displays
4. Select **Surgery Rapid**
5. Click **OK**

**NOTE**. By selecting **Surgery Rapid** as an Appointment type, the following **SAF** fields display and may be needed to book this appointment.

- *Person name
- *Appointment location
- *Primary Surgeon
- Anesthesiologist
- Patient Type
- Priority
- Add On
- PAC Required?
- Preop Diagnosis
- Hip Fracture Diagnosis Code
- Time Critical Procedure Time (hrs)
- Sched Event ID
- Private Surgical Comments
- Public Surgical Comments

2 Below are the steps to book an Emergency Appointment into the **Work in progress**:

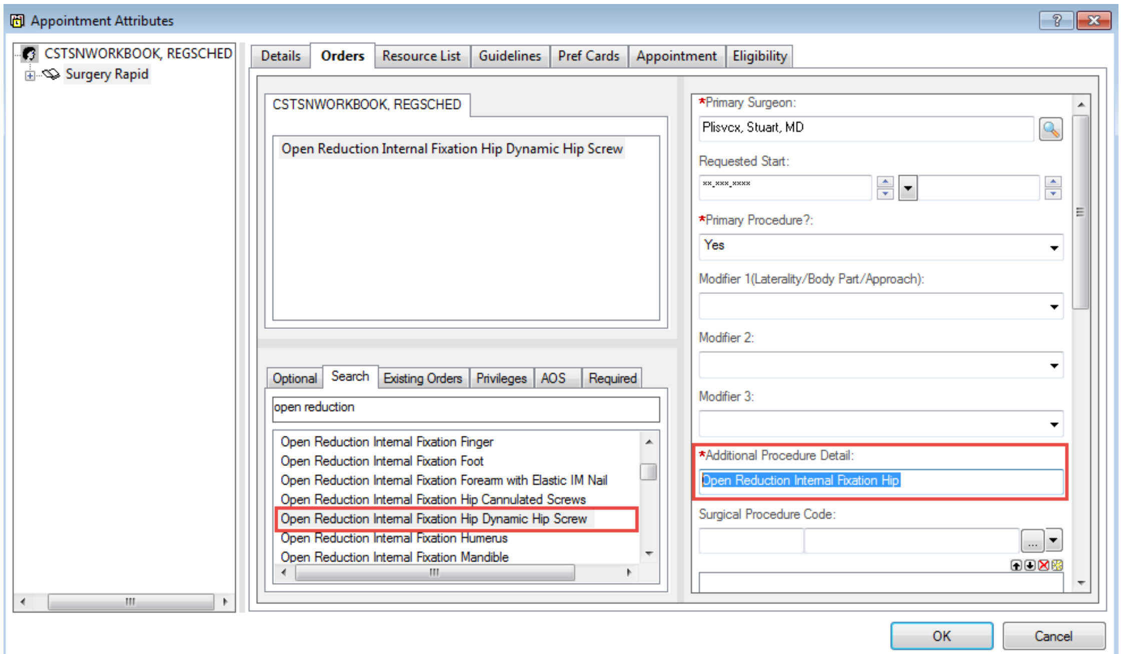
1. Click the Ellipsis (...) icon next to the **Person Name** field

Enter the Patient's information:

- **First Name** = *<first name>*
- **Last Name** = *<last name>*

2. Click **Search**
3. **Select** the patient from the result list **and select** the existing emergency encounter
    - **Note:** The **Med Service** column will display as = *Emergency*
4. Click **OK**
5. Click **Close** to close the External MPI window
6. Select Appointment location from the drop down = *LGH Main OR*

7. Enter **Primary Surgeon** = *<provider name>*
8. Select **Patient Type** = *SDA – Same Day Admit*
9. Select **Priority** = *E4: < 48 hours*
10. Verify that **Add On?** = *Yes (if not, Select Yes from the drop down)*
11. Click **Move**
    - **Appointment Attributes** window displays (Orders tab is displaying by default)




12. Search the Procedure:
    - **Enter** in the Search text field = *Open Reduction Internal Fixation Hip Dynamic Hip Screw*
13. Double Click on the corresponding **Procedure** = *Open Reduction Internal Fixation Hip Dynamic Hip Screw* from the list
14. Enter the **Additional Procedure Detail** = *Open Reduction Internal Fixation Hip Dynamic Hip Screw*
15. Click **OK**
    - At this point, the appointment is now in the **Work in progress (WIP)** section of Schapptbook.
16. Click the selected resource (LGH Main OR Rooms) and drag and drop it to the available room (LGH AddOn) and to the appropriate time slot

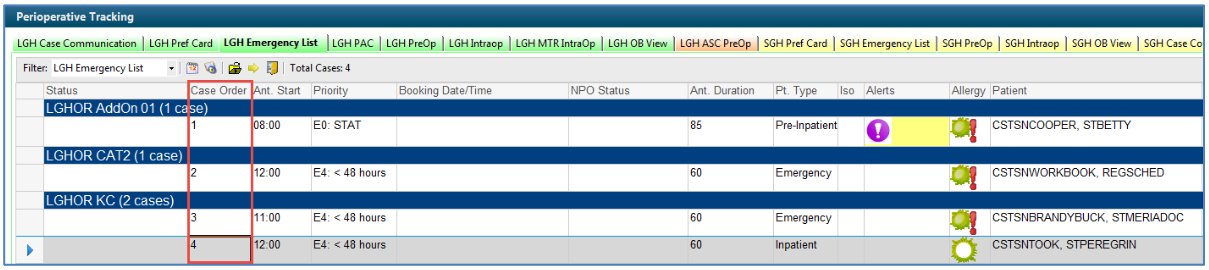
**Note**: AddOn rooms are not physical rooms in LGH. They are used to waitlist Emergency cases until they are scheduled to a specific operating room.

17. Click **OK**.
18. The appointment will show in the slot in the *Pending* state and is colored YELLOW
19. Click **Confirm**
20. Confirm window displays
21. Verify the information in the window
22. Click **OK**

3 Login to PowerChart  and Access **Perioperative Tracking**

In the Emergency List tracking view, the case Order column can be used to set the priorities of the Emergency cases.

To set the **Case Order**:




1. Click **LGH Emergency List** tracking view
2. Double click the **Case Order** column for your patient.
3. **Enter** a sequential number (E.g., 2 or 10) and press **Enter**.

## Key Learning Points

- The Appointment Type for Emergency Cases is Surgery Rapid
- Selecting Surgery Rapid will change the fields within the Surgery Accept Format (SAF)
- Emergency Cases booked within Schapptbook will display in the LGH Emergency List Tracking View
- Sort the Case Order of Emergency Cases by double clicking the Case Order Column

# Activity 3.2 – Bumping Elective Appointment(s)

1

Reopen Schapptbook for this Activity

An Emergency appointment needs to be rescheduled to a specific operating room. If the selected operating room has a prior scheduled confirmed Elective appointment, then the Emergency appointment will bump that Elective appointment.

An Emergency appointment can be rescheduled into a specific operating room using Schapptbook. This will only be applicable if the Elective appointment(s) that will be bumped are all non-checked in (The appointment(s) is/are colored Blue).

**NOTE**: The following steps are similar steps discussed in the Scheduling Foundation Course – Reschedule via Drag and Drop.

1. Drag and Drop the confirmed appointment you just completed from the Scheduling Grid into the **Work in progress**
    - Existing Encounter window displays
2. Click **Yes.** (If you get another Existing Encounter window**,** click **OK.)**
    - Appointment Attributes window displays
3. Click **OK**
    - Appointment is now in the Work in progress section

**To bump an Elective appointment :**

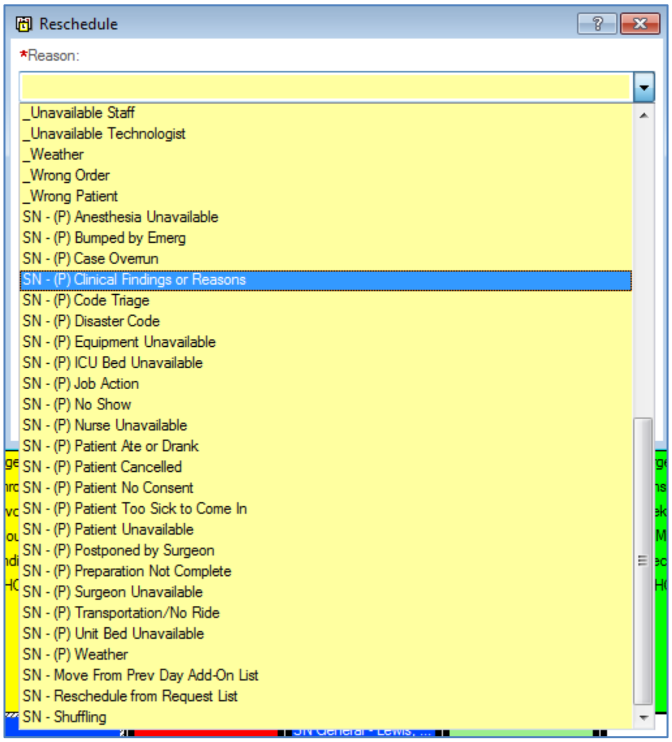
4. Click the appointment within the **Work in progress** and drag and drop it to the available room (E.g., *LGHOR LON*) and to the same timeslot of an existing Elective Appointment

    **NOTE:** If the Slot Not Valid window displays:

    - Click **Override**
    - Select **Override Reason** = *SN – Scheduling Need*
    - Click **OK**
    - Insert – Surgery Rapid window displays
5. Click **OK**
6. Appointment Book window displays. Click Yes button
    - **Confirm Insert\Bump** window displays

    Click OK

    - **Confirm** window displays
7. Click **OK**
    - **Reschedule** window displays




8. Select **Reason** = *SN – (P) Clinical Findings or Reasons*
9. Click **OK**
    - The Emergency appointment and the bumped Elective Appointment(s) are all confirmed and are colored CYAN

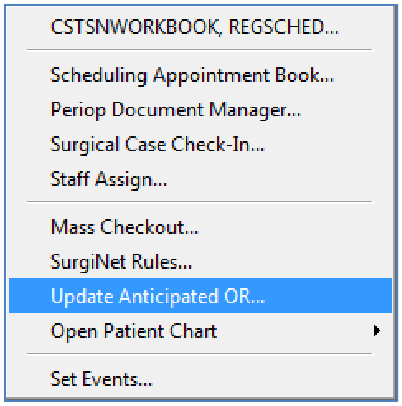
2

Reopen PowerChart for this Activity

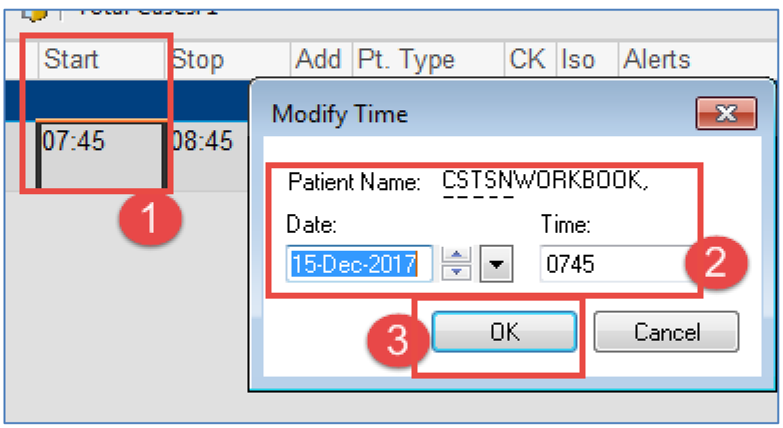
If one of the Elective appointments that will be bumped is checked in (colored GREEN), the reschedule should be done in PowerChart.

**Note**: The Clerk can use the Schapptbook to see if there are Elective appointments in the designated operating room that are checked in.

1. Click the **LGH Emergency List** tracking view
2. Search for the corresponding Emergency appointment that needs to be rescheduled to a specific operating room



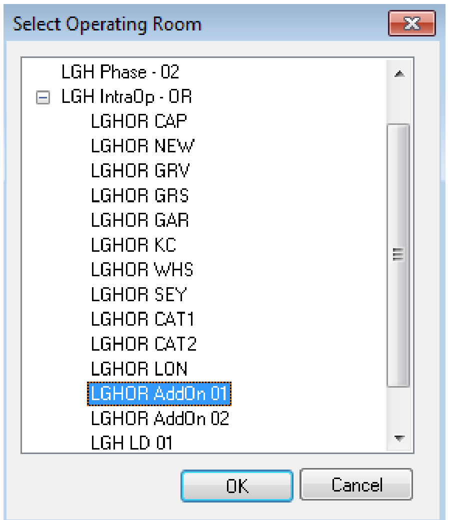

3. Right click anywhere on the patient's row and select **Update Anticipated OR…** from the drop down list
    - Select **Operating Room** window displays
4. **Select** the operating room the patient will be moved to <e.g, LGHOR GRV>
5. Click **OK**
6. Click **LGH Intraop** tracking view




7. Search the corresponding Emergency appointment and Double click the **Start column** of the patient's row
    - Modify Time window displays
8. Enter the **Estimated Start Time** (the nurse has advised you it needs to be 30 minutes later than the current time.)
9. Click **OK**

If the Surgery of the Bumped patient is not happening within the same day, the Bumped Patient is moved to the AddOn room.

10. Right Click anywhere on the Bumped patient's row and Select **Update Anticipated OR…** from the drop down



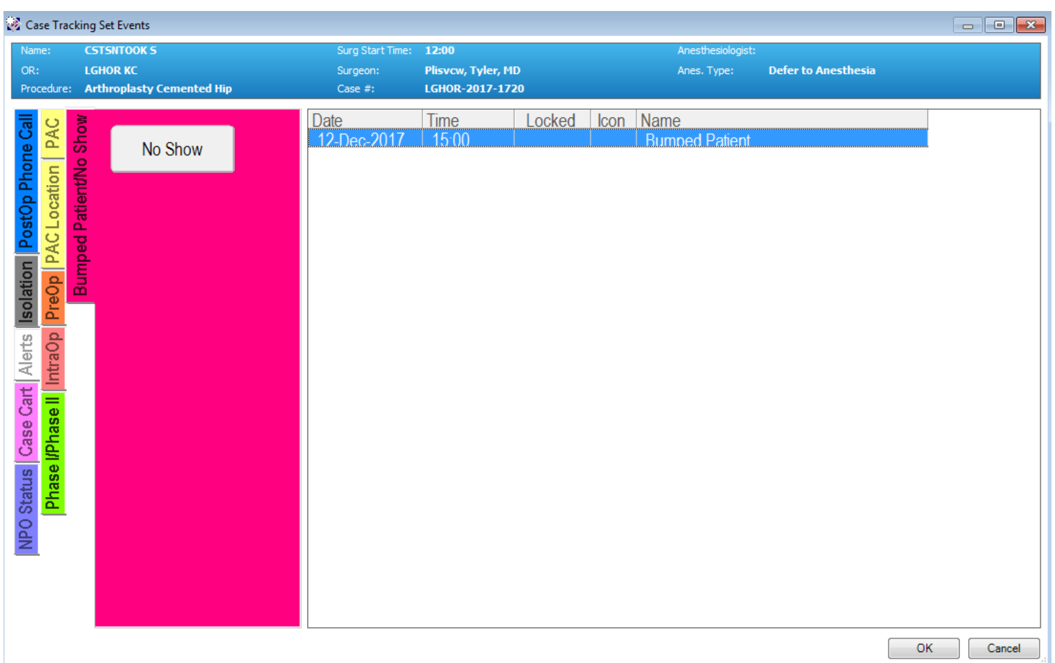

11. Select the available AddOn room (e.g, LGHOR AddOn 01)
12. Click **OK**

3

A Bumped patient can be flagged by an Event called *Bumped Patient* for faster identification.

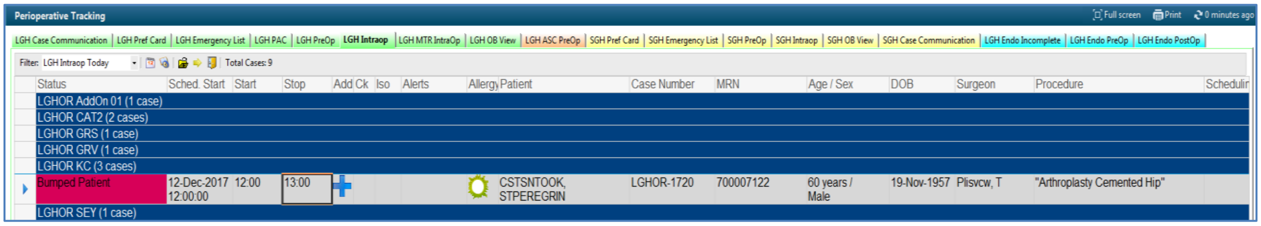
To set the Event:

1. Click the corresponding Tracking view where the Bumped patient is displayed. For this activity, click **LGH Intraop** Tracking View
2. Right click anywhere on the patient's row and Select **Set Events** from the drop down list



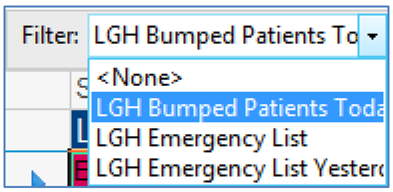

3. Click the **Bumped Patient/No Show** tab

4. Click **Bumped Patient**
5. Click **OK**
6. Verify that the patient status has been updated on Perioperative Tracking

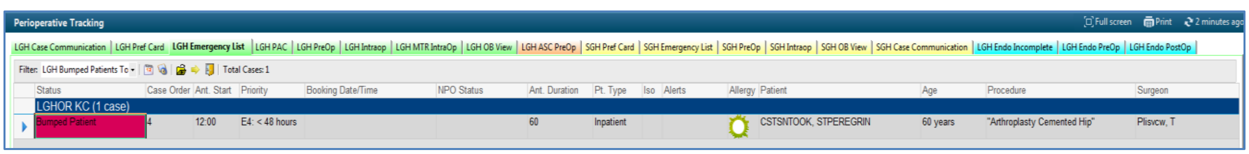



4

Setting filter to see all Bumped Patients Today




1. Click the LGH **Emergency List Tracking** View
2. Click **Filter** drop down and Select *LGH Bumped Patients today*
   a. The Tracking View will only display all appointments that has **Status** = *Bumped Patient*




## Key Learning Points

- Bump Confirmed appointments via Schapptbook by rescheduling the appointment into the same date and time slot of the existing appointment
- Bump Checked-In appointments via Powerchart. By updating the Anticipated OR and Start Time.
- The Bumped Patient filter can be set to all appointments that have been bumped whether Checked-in or Confirmed
- Filters can be utilized within the LGH Emergency List Tracking View to display only Bumped patient appointments

# Activity 3.3 - Book a Time-Critical Procedure Appointment

**1**

Reopen Schapptbook for this Activity

The Time Critical Procedure Appointment is booked the same way as booking an Emergency Appointment. There are 2 important fields that need to be populated:

| Fields | Description |
|---|---|
| Hip Fracture Diagnosis Code | This flags whether the Emergency patient is in-hospital (admitted originally to the site) or out-hospital (transfer from other site) |
| Time Critical Procedure Time (hrs) | This number is used to calculate the remaining time for the procedure |

To book a Time Critical Procedure Appointment:

- Follow the same steps from the Booking of Emergency Appointment (Activity 3.1) but enter the following:
- Search for **Arthroplasty Cemented Hip** in Appointment Attributes, **add it and the following two fields of info in the SAF**:


  - Enter **Hip Fracture Diagnosis Code** = *Acute Hip Fracture – In Hospital*
  - Enter **Time Critical Procedure Time (hrs)** = *48*

2. Confirm the Appointment the same way as the Booking of Emergency Appointment (Activity 3.1)

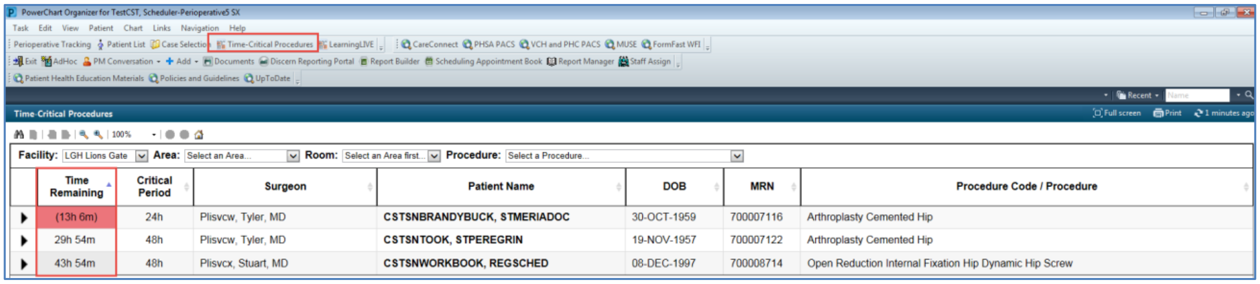
**NOTE:**

- If the **Hip Fracture Diagnosis Code** is set to *In Hospital*, the calculation of **Time Critical** is based on the Provider's order to Admit Date/Time.
- If the **Hip Fracture Diagnosis Code** is set to *Out of Hospital*, the calculation of **Time Critical** is based on the Transfer

**2**

The **Time-Critical Procedures** mPage is used to show all the Time Critical Procedure appointments and their timers.

To access the Time-Critical Procedure mPage, reopen Powerchart:




3. Click the **Time-Critical Procedures** from the Toolbar

4. Select Facility = LGH Lions Gate

| Fields | Description |
|---|---|
| Time Remaining | This column shows the timer of the Time Critical Procedure.<br>It turns Yellow if the remaining time is less than12 hours<br>It turns Red if the remaining time is overdue. This will also turn red if the time remaining has an ERROR |
| Critical Period | This is the same as the Time Critical Procedure (hrs) in the SAF |
| Surgeon | Name of the attending surgeon |
| Patient Name | Name of the patient |
| DOB | Date of Birth |
| MRN | Medical Record Number |
| Procedure Code / Procedure | Name of the Surgical Procedure |

**NOTE**: The MPage can be filtered using pre-defined filters:

- By Facility
- By Area
- By Room
- By Procedure

## Key Learning Points

- Time Critical procedures use the Surgery Rapid Appointment Type
- Populate two new fields *Hip Fracture Diagnosis Code* and *Time Critical Procedure Time (Hrs)* for Time Critical Procedures within the Scheduling Accept Format (SAF)
- The Time-Critical Procedures MPage is used to show all Time Critical Procedure appointments and their Time Remaining

# Activity 3.4 – Reschedule Elective to Rapid

DATASHEET

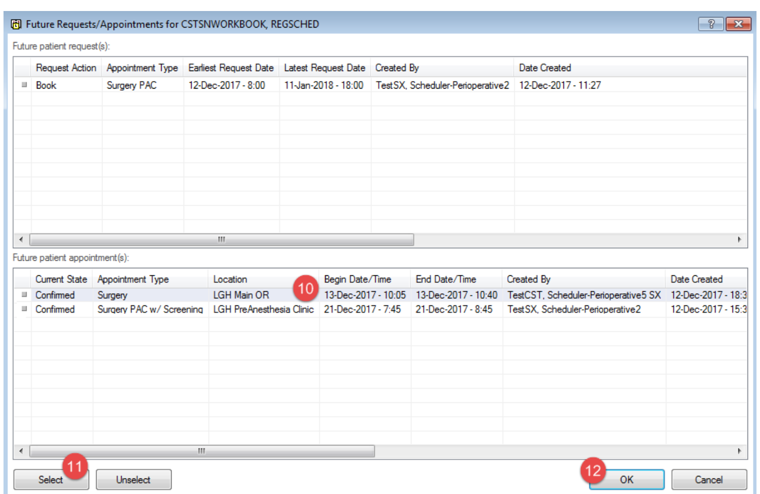
1 Reopen Schapptbook for this Activity

Existing Elective appointment can be converted to an Emergency appointment.

To convert an existing Elective appointment to an Emergency appointment:

Select an Appointment type:

1. Click the **Appointment** Tab in Schapptbook
2. Enter **Surgery** in the **Appointment Type** field
3. Click the Ellipsis (…) icon next to the Appointment Type Field
    1. **Appointment Type Help** window displays
4. Select **Surgery Rapid**
5. Click **OK**
6. Click the Ellipsis (…) icon next to the person name field
7. Enter the Patient's information:
    1. **First Name** = <*first name*>
    2. **Last Name** = <*last name*>
    3. Click **Search**
8. Select the patient from the result list **and** their Pre-Day encounter.
9. Click **OK**
10. Click **Close** to close the External MPI window**.**
11. Future Requests/Appointments window displays




12. Click the **Elective appointment** from the Future patient appointment(s) section
13. Click **Select**

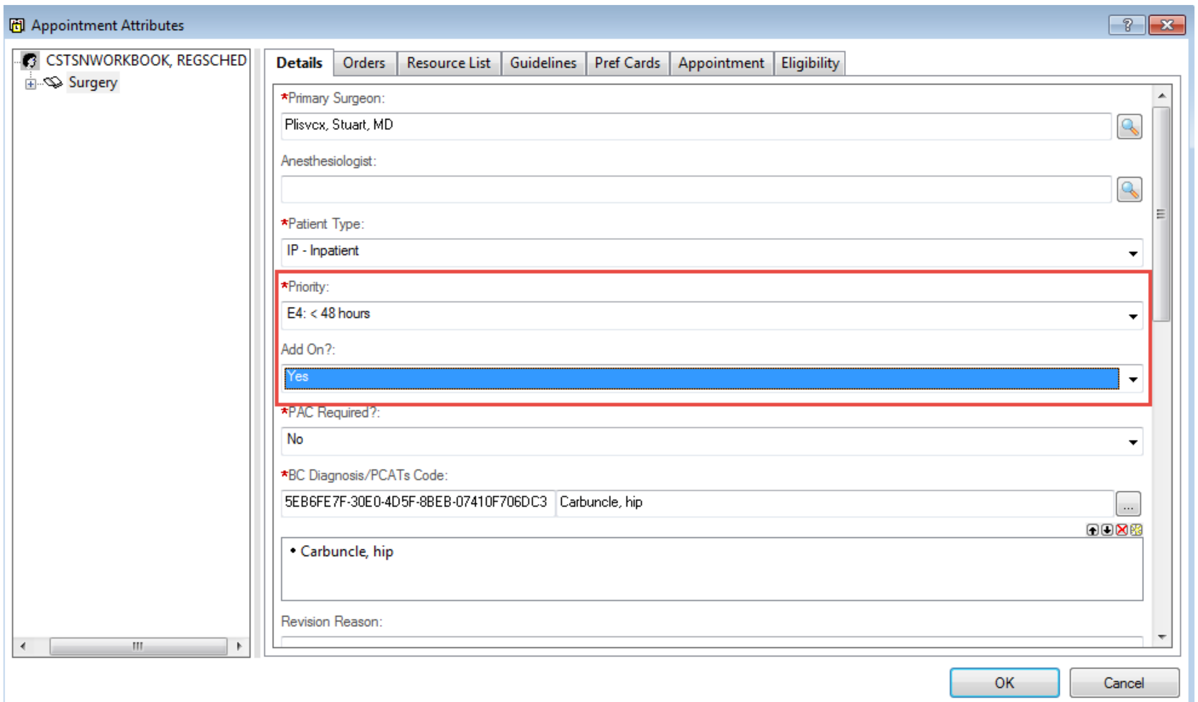
- The Elective appointment will have a *Red* checkmark

14. Click **OK**

- **Existing Encounter** window displays

15. Click **No. (**If a second Existing Encounter displays, click **OK.)**

- **Appointment Attributes** window displays




16. Click the **Details** Tab
17. Check to see if the **Provider** has changed.
18. Modify **Priority** = *E: < 48 hours*
19. Modify **Add On?** = *Yes*
20. Click **OK**

- The appointment is now in the **Work in progress** section of the Schapptbook

21. Click the selected appointment from the **Work in progress** window and drag and drop it to the available room (**LGH AddOn**) and to the appropriate time slot

- **Note**: If you see a **Schedule – Surgery** window displaying, click **OK**.
- The appointment will show in the slot in the *Pending* state and is colored YELLOW

22. Click **Confirm**

- **Confirm** window displays
- Verify the information in the window

23. Click **OK**
    - **Encounter Selection** window displays
24. Select the existing **Encounter** = *Pre-Day*
25. Click **OK**
    - **Reschedule window** displays
26. Select **Reason** = *SN* **–** *(P) Clinical Findings or Reasons*
27. Click **OK**
    - The appointment is now confirmed and is colored CYAN

**Note:** Although this appointment will display as **Appointment type** = *Surgery* within the scheduling grid, please remember that this appointment will be treated as an Emergency due to changing the values of Priority and the Add On? Fields

## Key Learning Points

- The Future Requests/Appointments window allows you to convert an existing elective appointment into a rapid appointment
- Elective Appointments will be regarded as an emergency if the *Priority* and *Add On?* Fields are populated

# SCENARIO 4 – OR LOGGER POSITION

| Learning Objectives |
|---|
| At the end of this Scenario, you will be able to:<br>■ Populate the Implant Log Segment |

## Overview

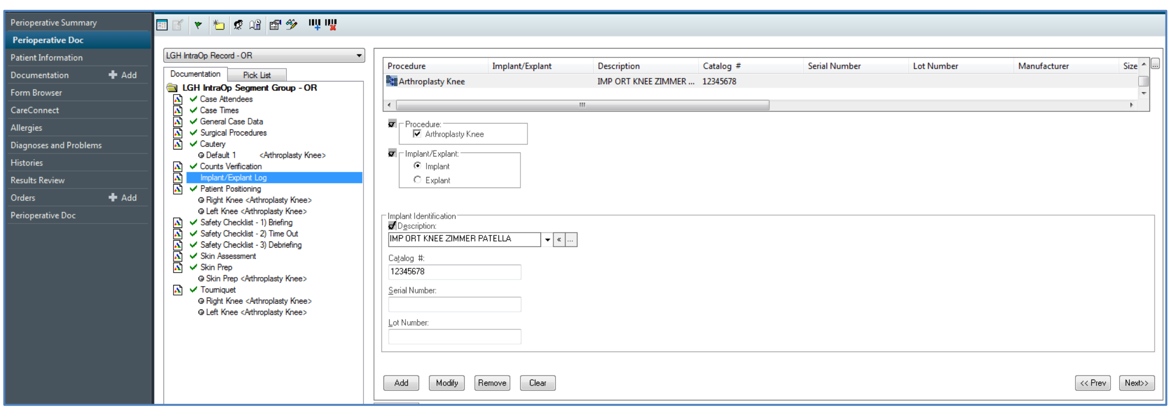
This work package includes Surgery related Registration and Scheduling specific supplementary material, to be learned in addition to the Scheduling Foundation Course and Registration Foundation Course.

# Activity 4.1 – Implant Log Segment

1 The OR Logger will add non-scanned Implants within the Perioperative Documentation - Implant Log Segment.

OR Logger logins to PowerChart to begin to access the patient chart:

1. **Click** Case Selection
2. Verify the Location is LGH Main OR.
    - If the location is not LGH Main OR**, click** Location
    - Location Selection window displays
3. Click **OK**
4. **Click** Case Number under the Select By heading and enter the patient’s case number: <LGHOR-2018-###>) – see your data sheet
5. **Click** Retrieve




6. Select the patient’s case to highlight it blue
7. **Click** Open
    - Assign a Relationship window displays
8. **Select** Clinical Support and click **OK**.
    - Patient’s Chart displays
9. **Click** Perioperative Doc within the menu on the left
10. Click **Implant/Explant Log segment**
11. Click the Implant listed below the Procedure heading:
    - **Verify Description displays correct implant name** = *IMP ORT KNEE ZIMMER TRAY PATELLA*

12. Enter the following:
    - **Implant Site** = *<Knee Left>*
13. Click **Modify (because you modified the implant)**
14. Click **Next**
    - **Confirm Save** window displays
15. Click **Yes**
16. Click **Ok**
    - **Tourniquet** segment displays

17. Click **Green Flag**  from the icons bar
    - **Document Verified** window displays
18. Click **Yes**

The **Perioperative Doc** Segments have been finalized and saved.

## Key Learning Points

- Implant Documentation is found within the Implant/Explant Log Segment within Perioperative Doc
- If the Encounter is discharged, retrieve the patient's record by locating the encounter in the Case Selection Window]
-

# SCENARIO 5 – PAC SCHEDULING CLERK

**Learning Objectives**

At the end of this Scenario, you will be able to:

- Use Request Lists/ Request List Inquiry
- Complete a Surgical Case Check In
- Display and Navigate the Patient's Chart
- Orders
- Access a Patient Route Slip

## Overview

This work package includes Surgery related Registration and Scheduling specific supplementary material, to be learned in addition to the Scheduling Foundation Course and Registration Foundation Course.

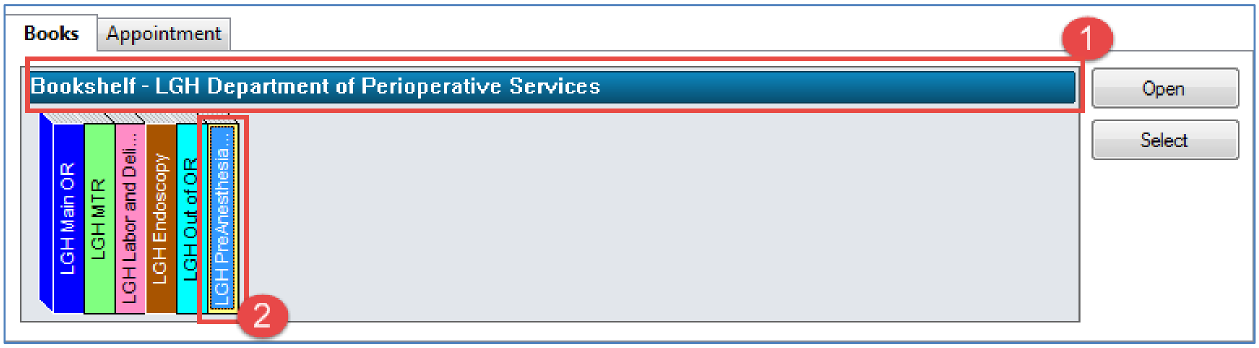
To Complete the activities within this workbook one must successfully have completed a base learning prior in:

- Request Lists (Scheduling Foundation Course)
- Appointment Scheduling (Scheduling Foundation Course)
- Pre-Registrations (Registration Foundation Course)

# Activity 5.1 – Request Lists / Request List Inquiry (PAC)

1

Login to Schapptbook to launch the Scheduling Appointment Book




To begin, ensure that your scheduling grid displays the LGH Main OR.

If not, open the Bookshelf – **LGH Department of Perioperative Services** and select the **PreAnesthesia Clinic Book** (Please refer to the Scheduling Foundation Course, to review steps on how to access the Bookshelf and Books)

An appointment without a confirmed Surgical or PAC date is called a Request. The Surgical Request List Inquiry holds a list of patients without a confirmed date.

There are two ways for a PAC Request to display in the **Request List**. The first is for the request to be put on the request list by a scheduling clerk. The second occurs when the PAC Clerk put the **PAC Request** to the **Request List** manually.

2

## Manually Creating A PAC Request

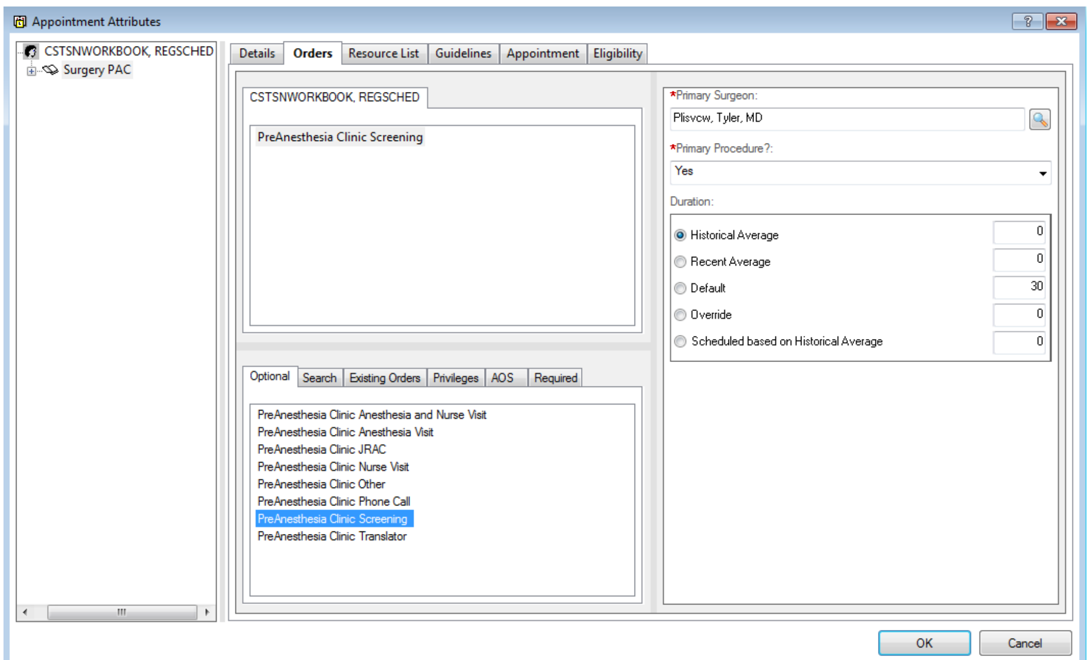
To select an Appointment type:

1. Click the **Appointment** Tab in Schapptbook
2. Enter **Surgery** in the Appointment Type field
3. Click the Ellipsis (...) icon next to the **Appointment Type** field
    - **Appointment Type Help** window displays
4. Select **Surgery PAC**
5. Click **OK**
6. Click the Ellipsis (...) icon beside the **Person Name** field
    - **Person Search** window displays
7. Enter the Patient's information:
    - **First Name** = *<first name>*
    - **Last Name** = *<last name>*
8. Click **Search**
9. Select the patient from the result list

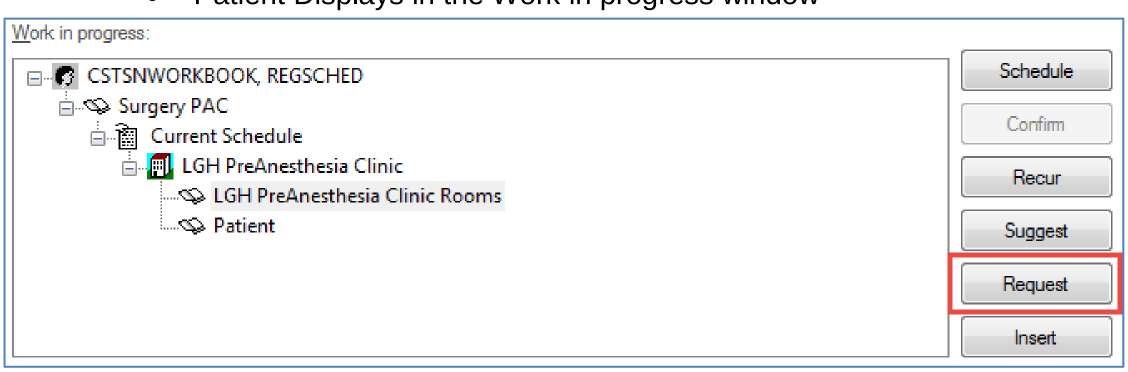
10. Click **OK**
11. The Organization window displays.
12. Enter LGH and click the ellipsis.
13. Select LGH Preanesthesia Clinic.
14. Click OK.
15. Click Close to close the External MPI window.
    - **Appointment Tab** displays

Use the following information to complete the **Scheduling Accept Format (SAF)**:

16. **Appointment Type** = *Surgery PAC*
17. **Appointment Location** = *LGH PreAnesthesia Clinic*
18. **Primary Surgeon** = *<Provider Name>*
19. Click **Move**
    - **Appointment Attributes** window displays

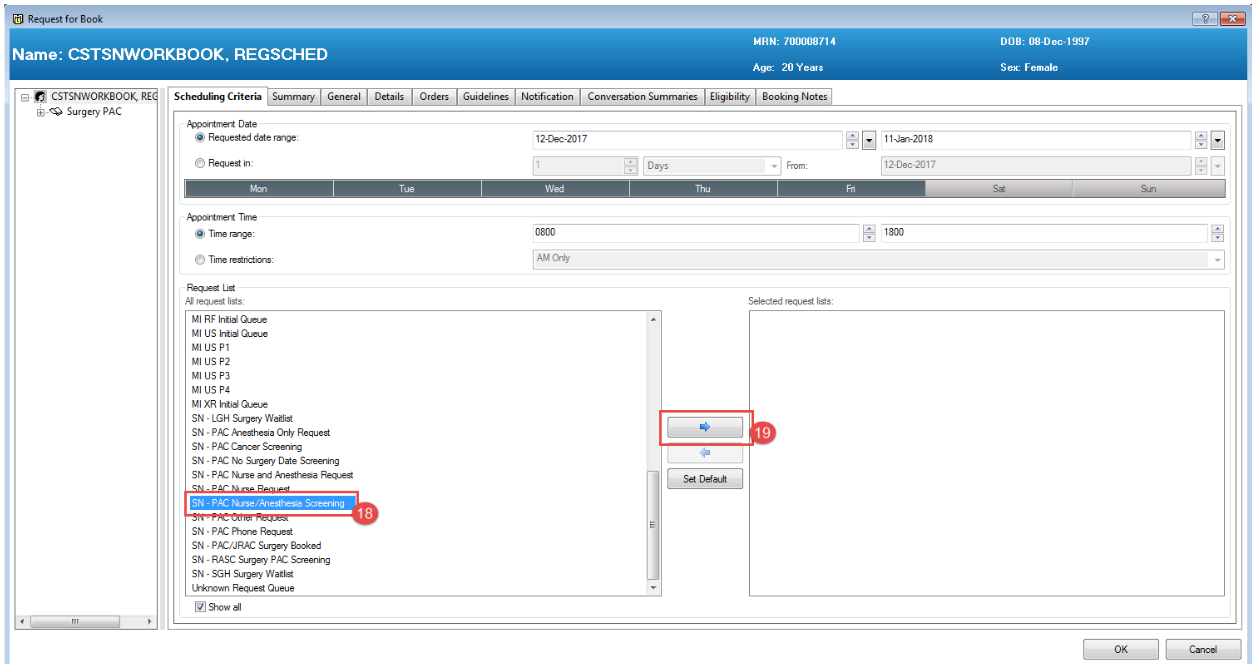



20. Double click **PreAnesthesia Clinic Screening**
    - PreAnesthesia Clinic Screening Displays in the top hand window
21. Click **OK**
    - Patient Displays in the Work in progress window



22. Click **Request**

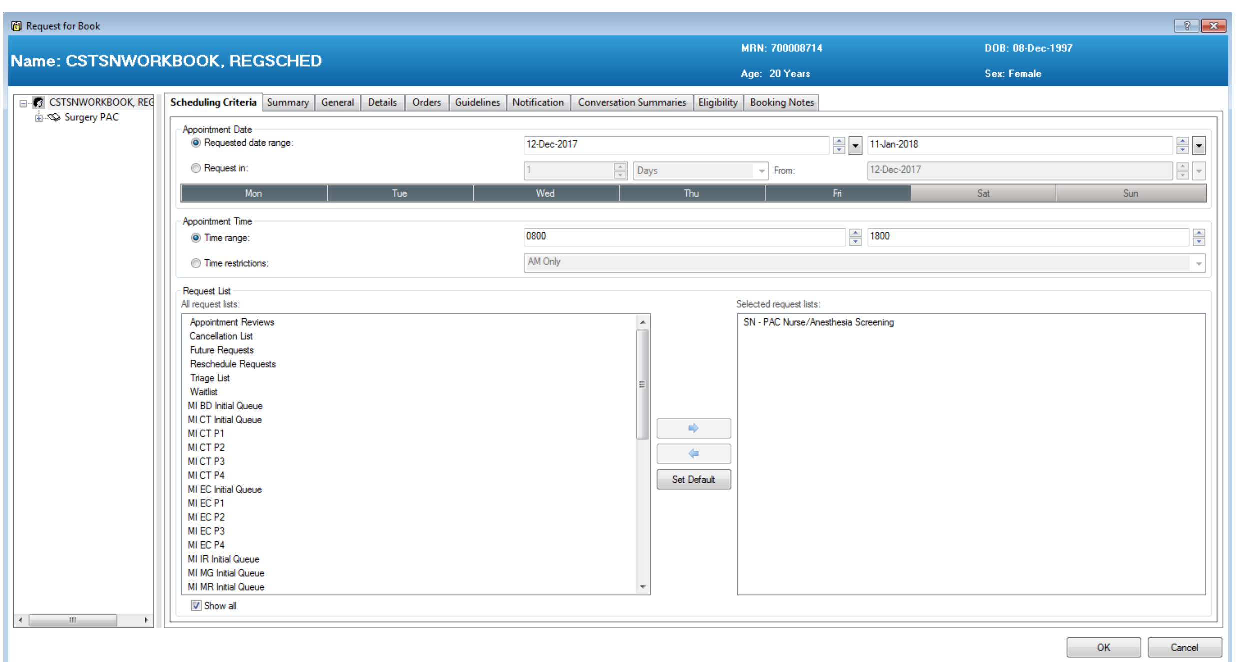
- Request for Book Window Displays




23. Click the Patient’s correct request list <SN- PAC Nurse/Anesthesia Screening>

24. Click the Blue Arrow 

- The SN-PAC Nurse/Anesthesia Screening Request list displays under the Selected Request List Window

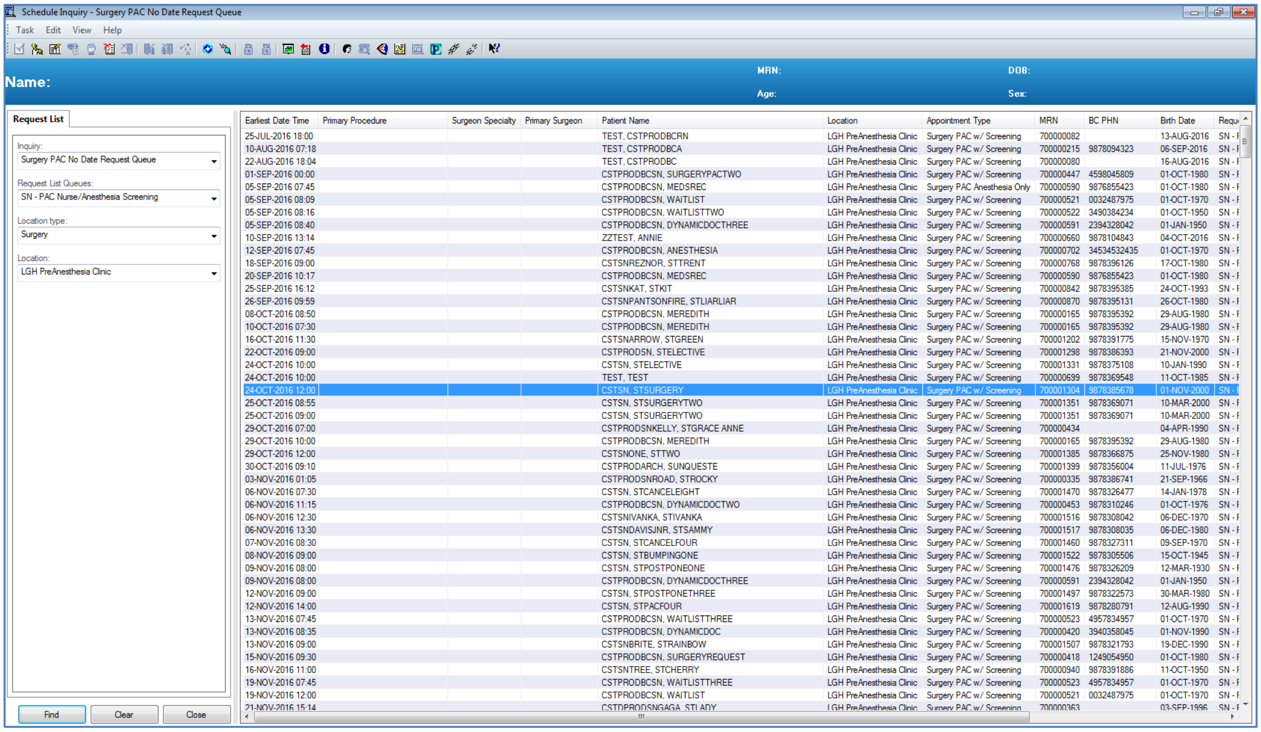



25. Click **OK**

- Request for Book Window Closes

The Request has now been put to the Request List Inquiry.

### Access Request List Inquiry




26. Click **Request List Inquiry**  within the toolbar
    - Schedule Inquiry- Request List by Location window displays

Within the Request List Inquiry, the PAC Clerk can do a variety of different activities to a Request. This can include monitoring the request list, cancelling a request, moving a request from one list to another, or completing the request into a confirmed date and time (Refer to the Scheduling Foundation Course) on how to complete the different variations.

There are two Inquiries that a PAC Clerk will need to schedule off of. This includes the Surgery PAC Request Queue and the Surgery PAC No Date Request Queue.

Within the Inquiries are Request List Queues. When given direction from the Screening Nurse, the Clerk can find requests within the Request List Queues to complete.

| Fields | Description |
|---|---|
| Inquiry | A way to search by certain criteria (e.g, cancellations, requests) Note: Always Select Inquiries prefixed with Surgery PAC |
| Request List Queues | Hold lists of appointment requests based on the type of appointment. **Note**: Always Select Request List Queues prefixed with SN - PAC |
| Location Type | Type of Location. Note: Always Select Surgery |
| Location | Surgical Area |

**Activity 5.1b – Completing PAC Request off Request List**


Use the following information to complete the search window:

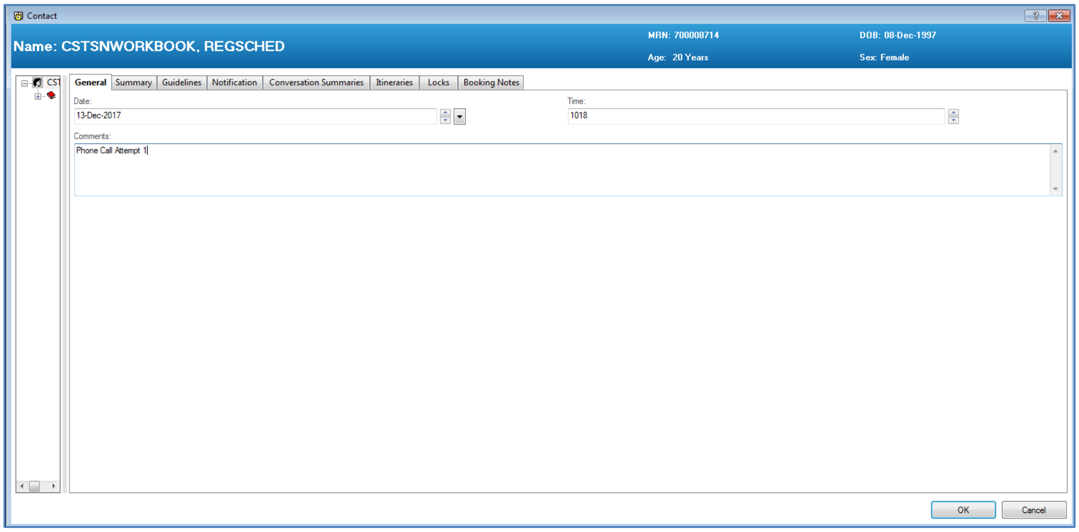
27. **Inquiry** = *Surgery  PAC No Date Request Queue*
28. **Request List Queues** = *SN – PAC Nurse/Anesthesia Screening*
29. **Location Type** = *Surgery*
30. **Location** = *LGH PreAnesthesia Clinic*

31. Click **Find**
    - Search Window Populates
32. **Click** the Patient

Patient's row is highlighted

3 Phone Call Attempt

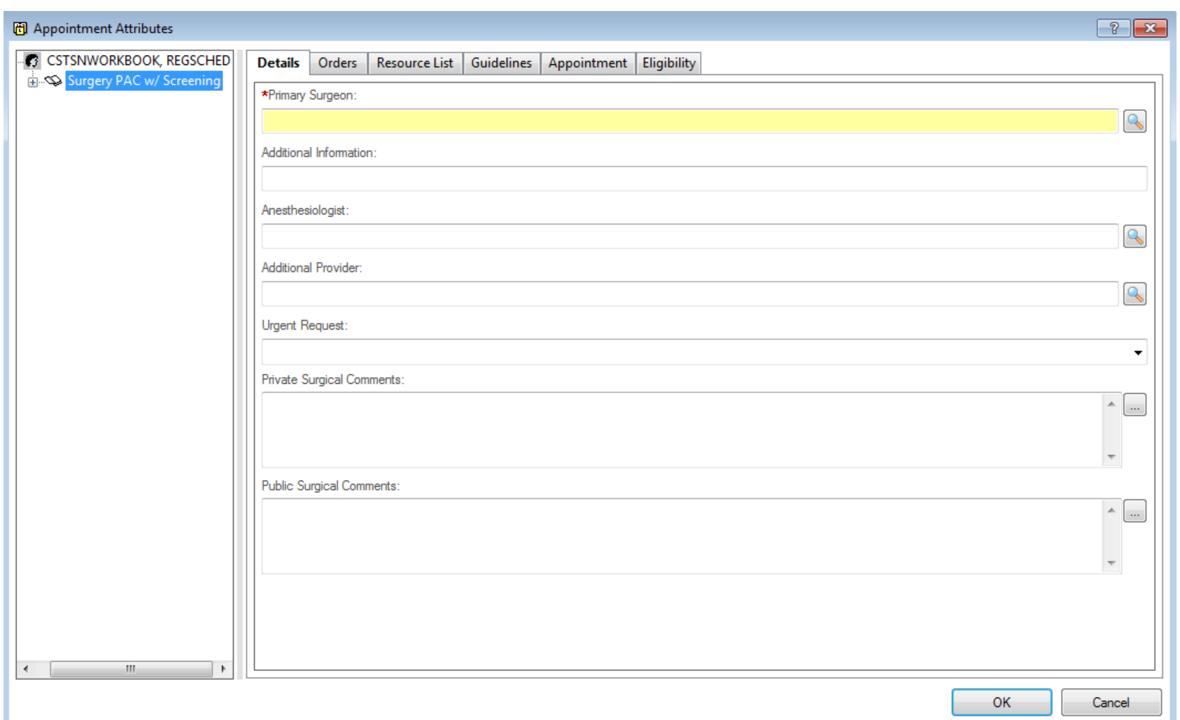
1. Right Click the PAC Request
2. Click **Contact**
    i. Contact Window Displays



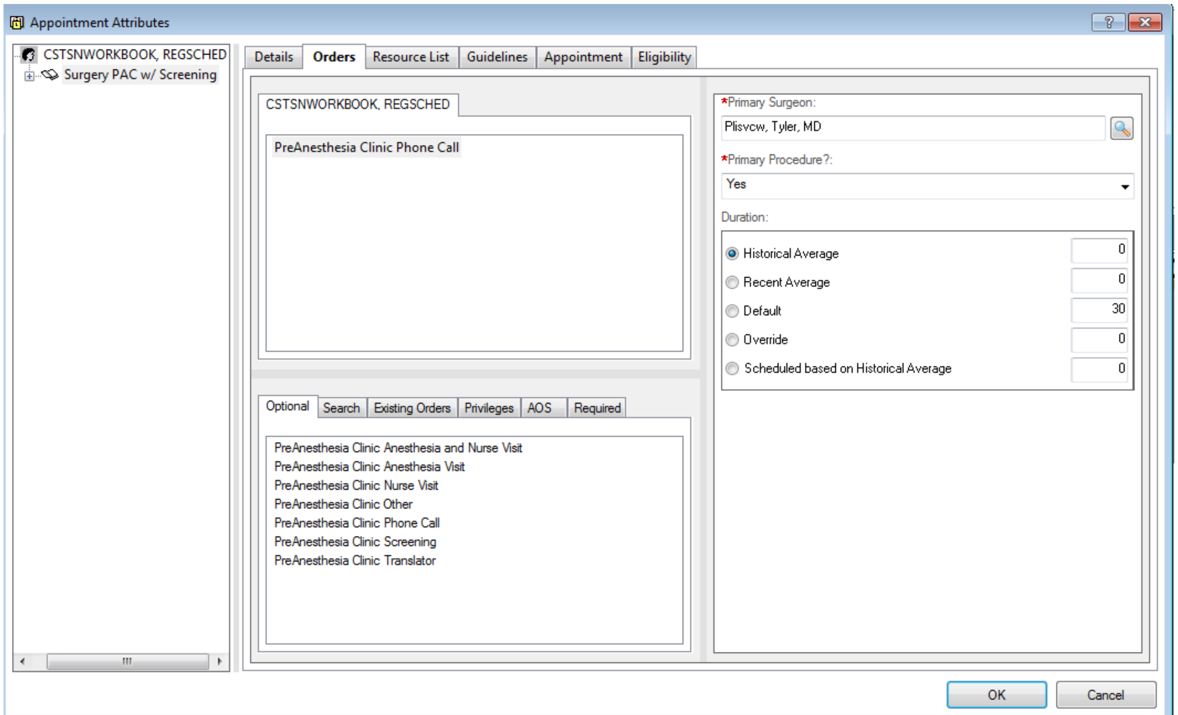

3. Enter Contact Comments <Phone Call Attempt 1>
4. Click **OK**

To Complete a patient's request into the Scheduling Grid

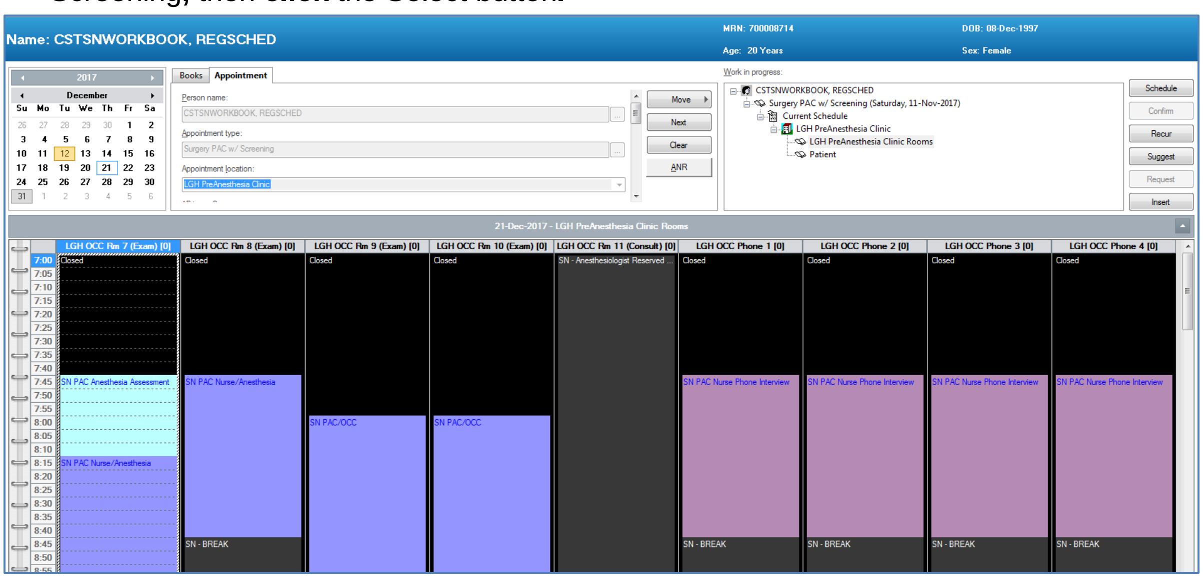
5. Right- click the Patient and click **Complete Request** from the drop-down list
    - Linked Appointments Window will display if the patient has a linked appointment. Click **OK** to close the window (Refer to the Scheduling Foundation Course)
    - Appointment Attributes window displays



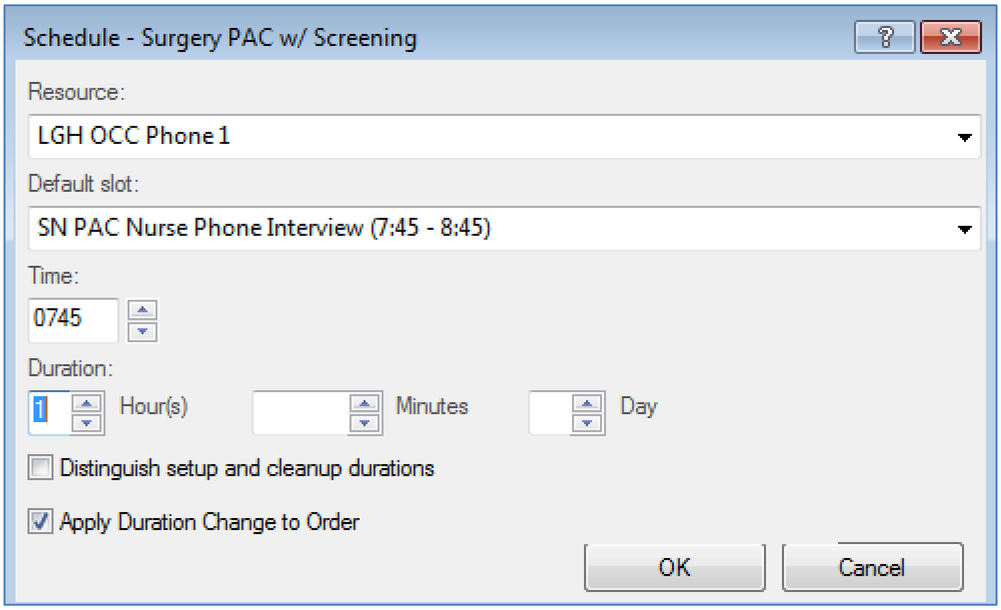

6. Enter Primary Surgeon, *Plisvcr, Carlton*
7. Click the **Orders** Tab



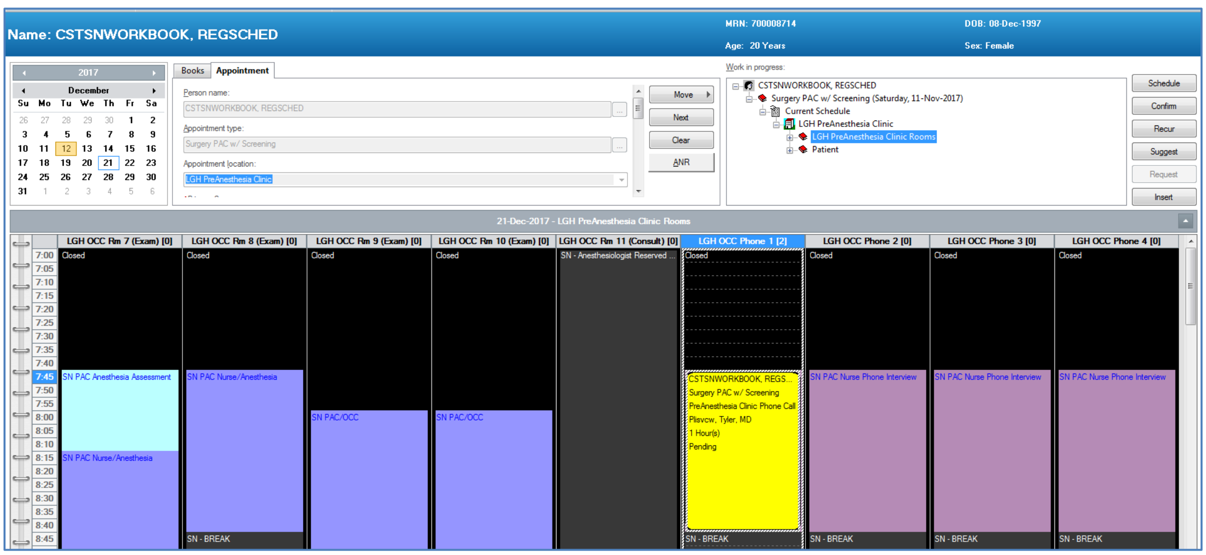

8. Double - click <PreAnesthesia Clinic Phone Call>
9. Click **OK**
10. **Note: If you see** a Duplicate Primary Order window here**, select** the PreAnesthesia Clinic Screening**,** then **click** the Select button**.**




11. Drag and drop the patient’s request from the Work In progress window two weeks from today into the Scheduling Grid for <SN PAC Nurse Phone Interview> (Refer to the Scheduling Foundation Course)
    - Schedule Window Displays



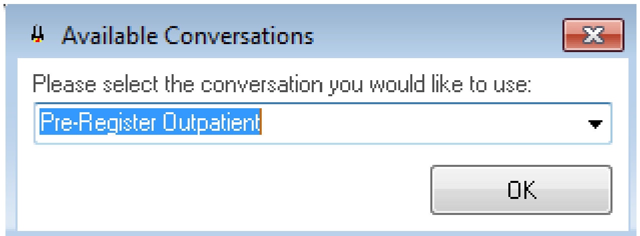

12. Click **OK**



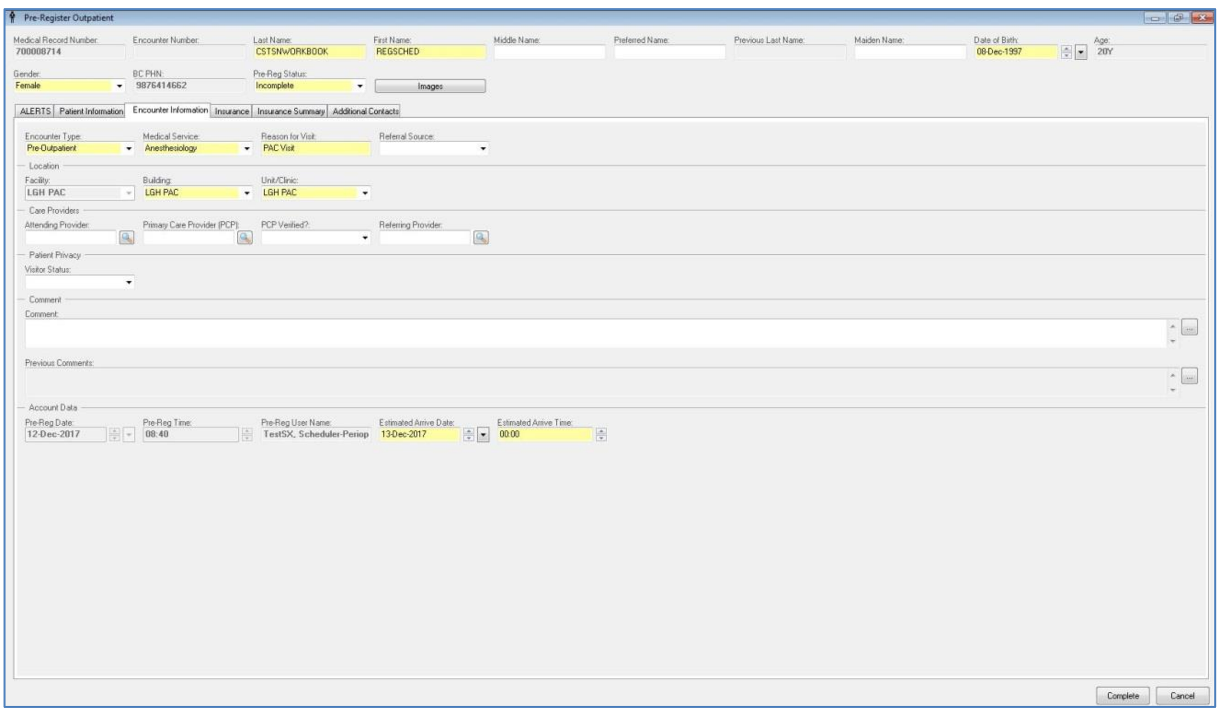

13. Patient displays in the Scheduling Grid In a Pending State
14. Click **Confirm**
15. Confirm Window Displays
16. Click **OK**
17. Encounter Selection Window Displays
18. Click **Add Enc**
19. Available Conversation Window Displays

4 Creating a Pre-Register Outpatient Encounter

PAC Appointments do not use the same Encounter type as a Surgical Appointment. For PAC visits we use Outpatient Encounters…..




1. Click **Pre-Register Outpatient**
2. Click **OK**
3. Click **Close** to close the External MPI window
4. If you see the message below, click OK.
5. Pre-Register Outpatient window displays




6. In the Patient Information tab, select Home Phone in the **Preferred Phone** field.
7. Click **Encounter Information** Tab

Use the following information to complete the Pre-Register Outpatient Encounter:

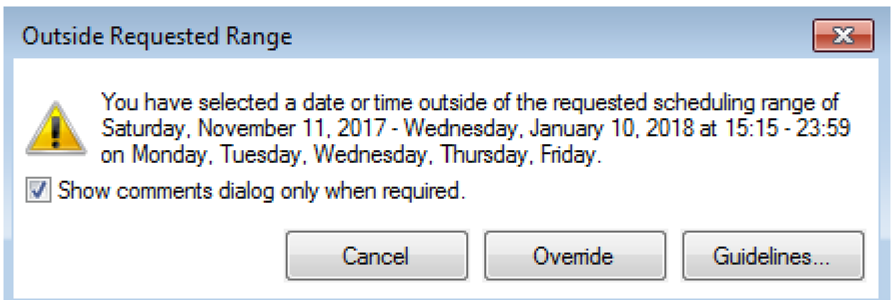
- **Encounter Type** = *Pre-Outpatient*
- **Medical Service** = *Anesthesiology*
- **Reason for Visit** = *PAC Visit*
- **Building** = *LGH PAC*

- **Unit/Clinic** = *LGH PAC*
- **Estimated Arrive Date** = <*Today’s Date*>
- **Estimated Arrive Time** = <*Current Time*>

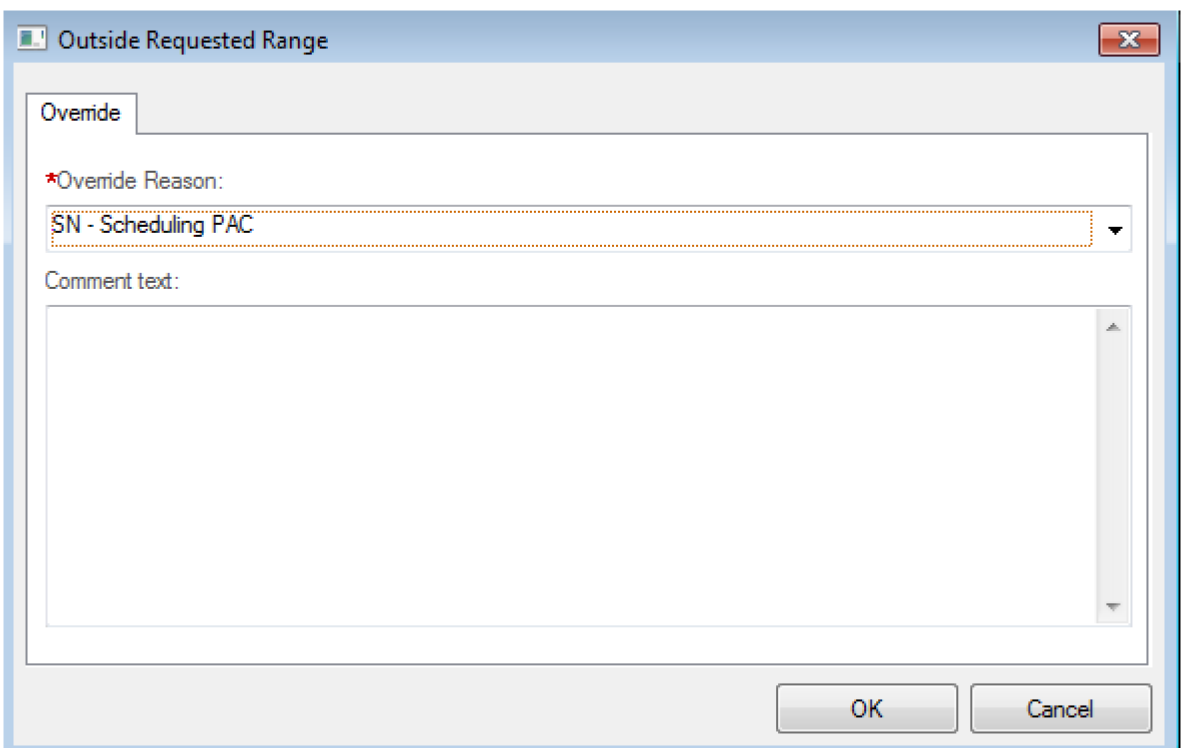
8. Click **Complete**
   a. **Pre-Register Outpatient** window displays
9. Click **OK**
10. Appointment is now confirmed within the scheduling grid

5 Patients Outside the Requested Range

If a patient’s request is scheduled outside of a two week radius, the system will prompt you with this error:




Click **Override** to Disable the Prompt.




Select your override Reason <**SN-Scheduling PAC**> and Click **OK**. After that, carry on with your normal scheduling process.

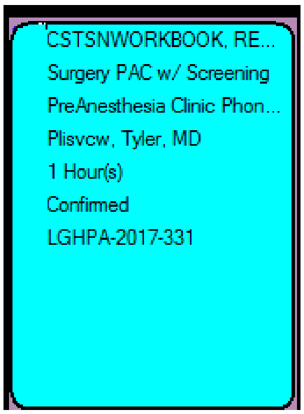
6 Linked Appointments

Appointment link functionality allows you to manually tie two unrelated appointments together for a particular patient situation (e.g., a Patient's Elective appointment can be linked to their PAC Appointment)

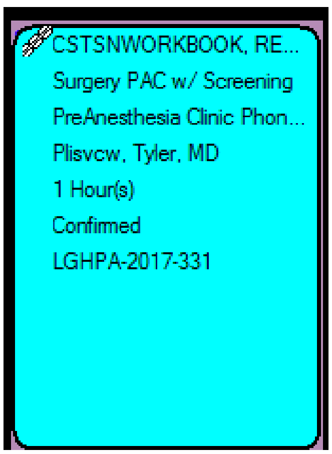
You have two options for linking appointments:

Option 1: Link to an existing (previously confirmed) appointment

Option 2: Link to a new appointment




**Note:** If the Patient's PAC Appointment does not have a Linked Appointment Icon  and has an associated Surgical Appointment (Refer to the Scheduling Foundation Course) on how to set a link.




**Note:** If the Patient has a **Linked Appointment** icon , this signifies that two or more appointments have been tied together to the confirmed PAC Appointment.

## Key Learning Points

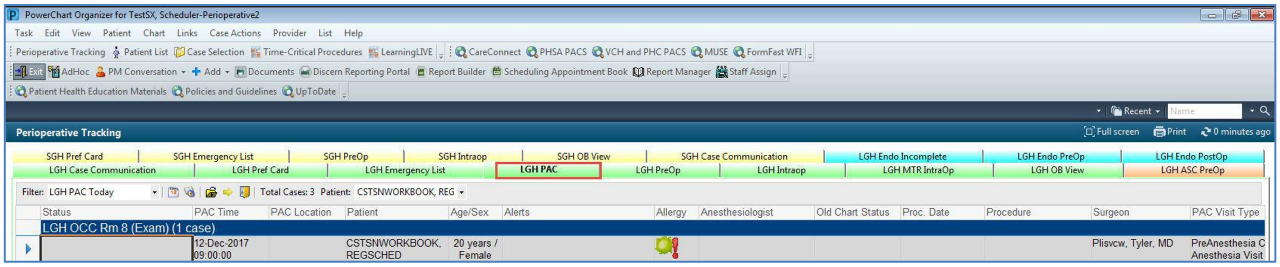
- PAC Appointments require a Pre-Registration Outpatient Encounter
- A patient's request within the Work In progress can be put into the Request list by selecting the Request button
- Access the Request List by selecting the Request List Inquiry Icon from the toolbar
- If a Patient is scheduled outside the requested range, you will be prompted with the *Outside Requested Range* window
- The Linked Appointment Icon displayed on a confirmed appointment signifies that the patient has a visit tied to their surgical appointment

# Activity 5.2 – Perform a Surgical Case Check-In

DATASHEET

1 Login to PowerChart and access **Perioperative Tracking**.

Check In Patient In Perioperative Tracking is only done for Minor Procedures and PAC Appointments.



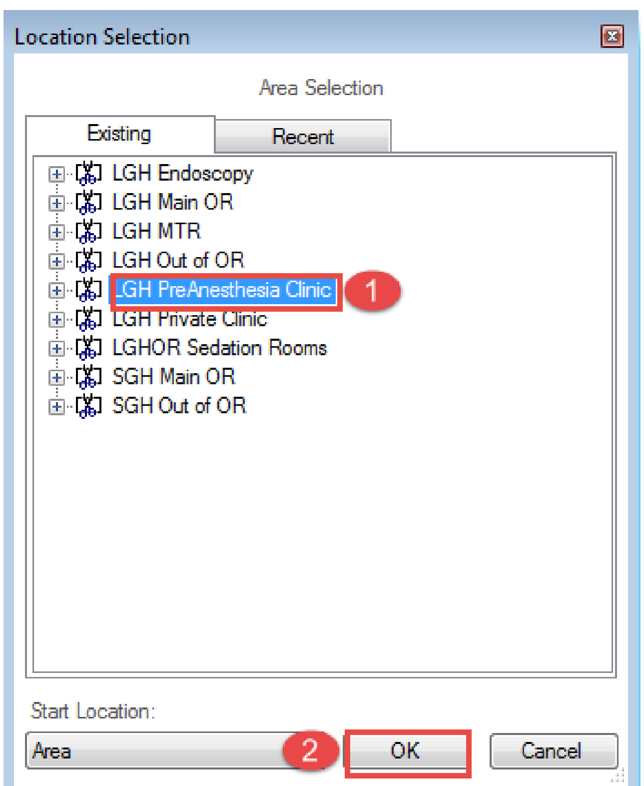

1. Select the **LGH PAC** view.

**Note:** For Minor Appointments, select **LGH MTR IntraOp** View

2. Select the patient.

3. Click Surgical Check In 

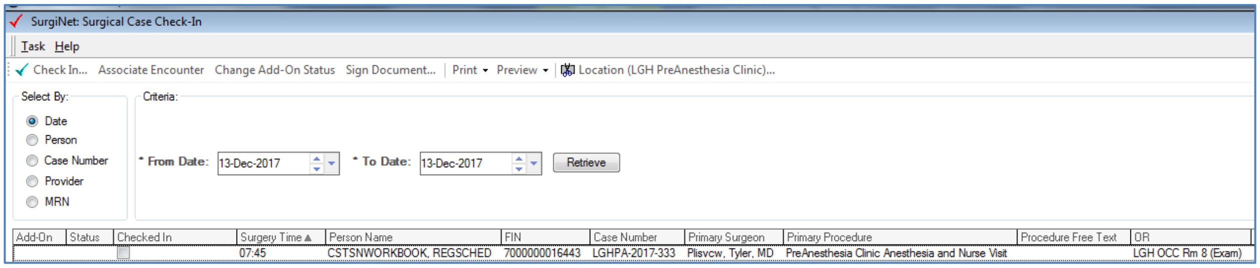
- If the Location Selection window displays, follow these instructions:




4. Click **LGH PreAnesthesia Clinic**

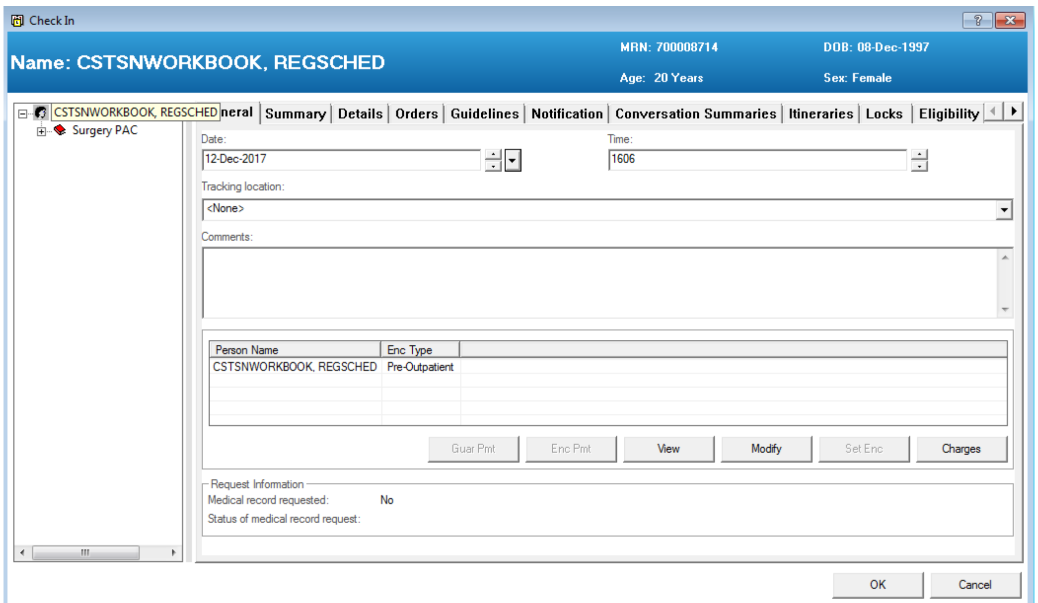
5. Click **OK**

   - **SurgiNet: Surgical Case Check-In** window displays

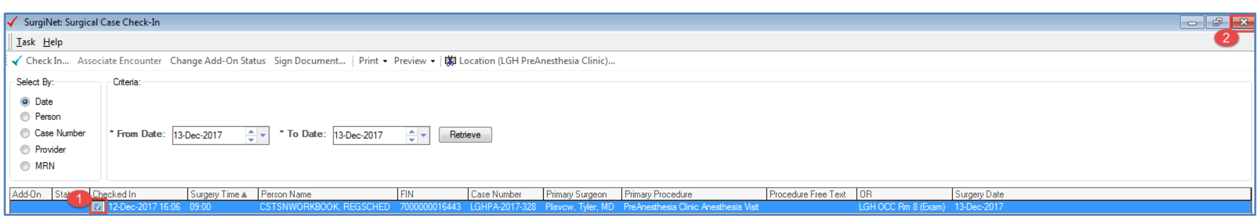



6. Click inside the Check Box to create a check mark and select it

   - **Check In** window displays




7. Click **OK**



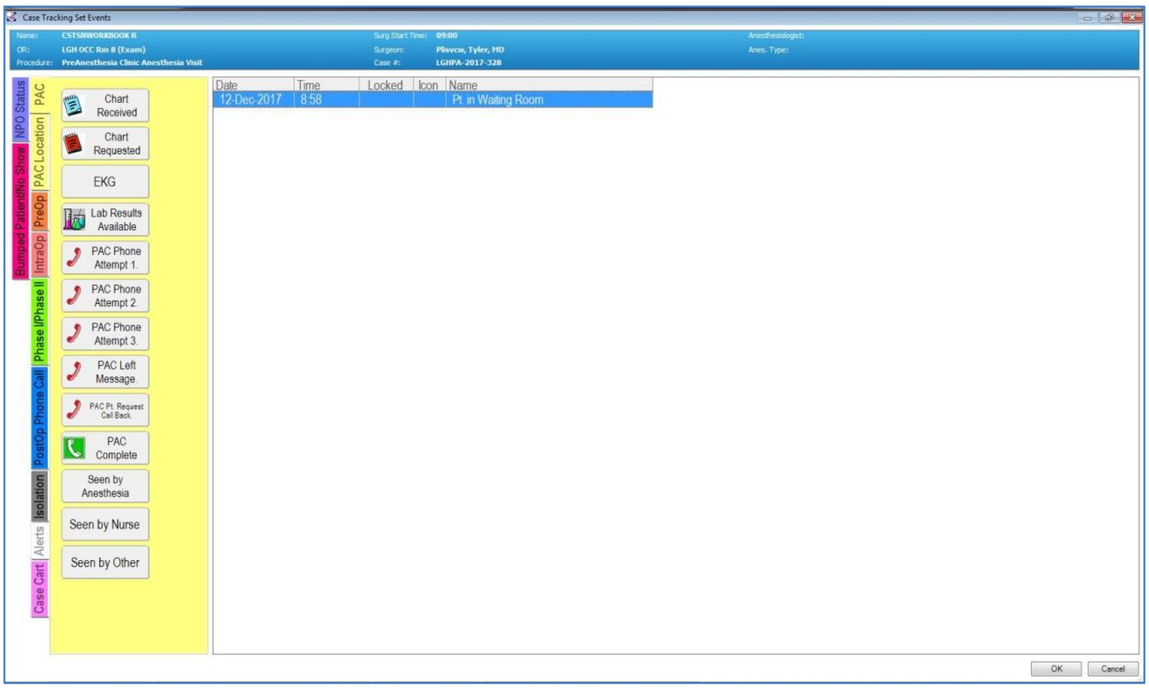

## Key Learning Points

- Surgical Case Check-In applies to PAC appointments and Minor Procedure Appointments

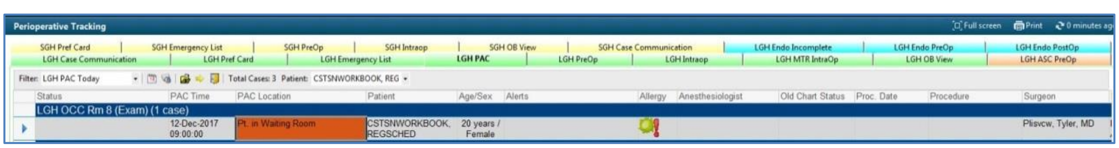
# Activity 5.3 – Navigate Perioperative Tracking and Setting an Event

**1** *Login to PowerChart and access **Perioperative Tracking**.*


1. *Click the corresponding Tracking view where the Bumped patient is displayed. For this activity, click **LGH PAC** Tracking View*
2. *Right click anywhere on the patient's row and select **Set Events** from the drop down list*
    - ***Case Tracking Set Events** window displays*




3. *Click the **PAC** tab on the left*
4. *Click on **Pt. in Waiting Room***
5. *Click **OK***



## Key Learning Points

- Communicate the patient’s current location by setting the Patient in Waiting Room Event

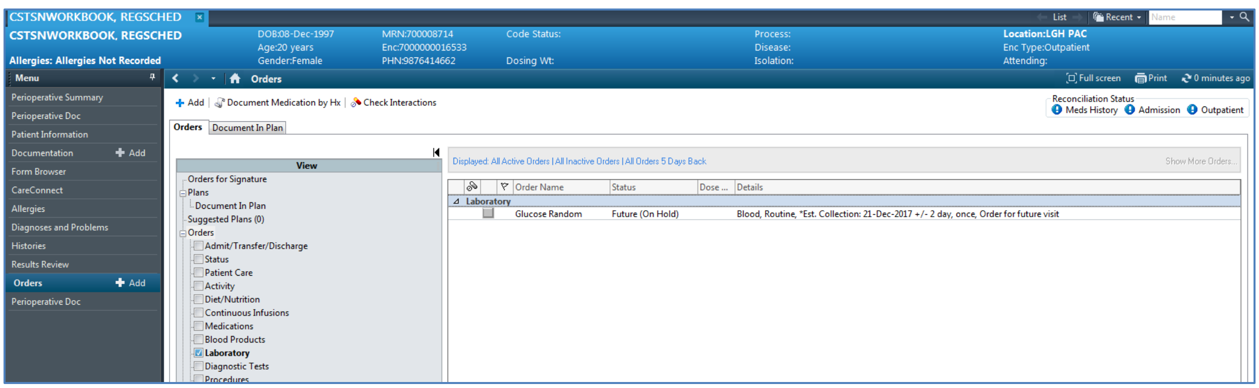
# Activity 5.4 – Activate Orders

1 Opening the patient's chart in **Perioperative Tracking**

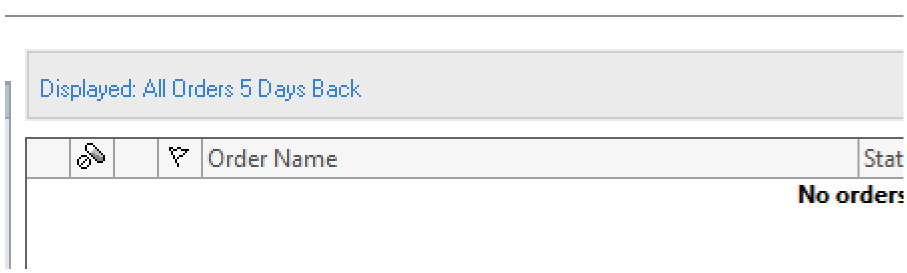
1. Select the appropriate patient by clicking on the row. A Blue arrow will appear.
2. Double click the Blue arrow next to the patient's chart to open their chart.
3. If this is the first-time logging in a patient's chart, the **Assign a Relationship** window will display, verify this is the correct patient. Select **Scheduling Clerk** to assign relationship.
   **Note:** If this is the wrong patient, click the cancel button to return to Tracking View.
4. Click **OK**
5. **Perioperative Summary** displays when you access a patient's chart. Verify this is the correct patient's chart that has opened.

2 To navigate the **Order Page** and review the orders:

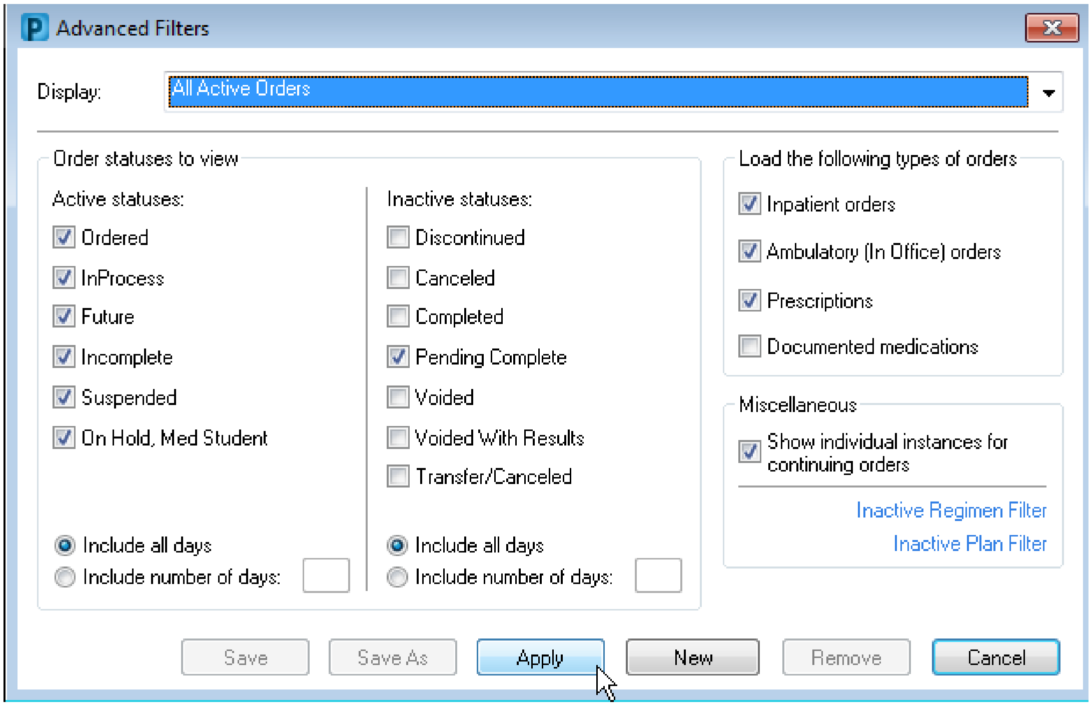
Orders Overview

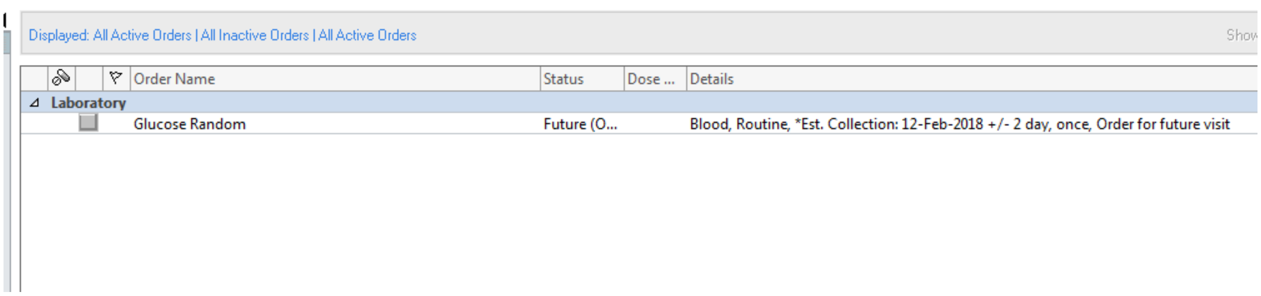



1. Select **Orders** from the **Menu**
   **Note**: if you do not have orders displaying, follow these steps:
   1. Click the Blue Hyperlinked Displayed Title Above the Orders Window




   2. Select All Active Orders from the drop-down and Click Apply. All Active Orders Will display




**Note**: if you do see Orders, continue here:

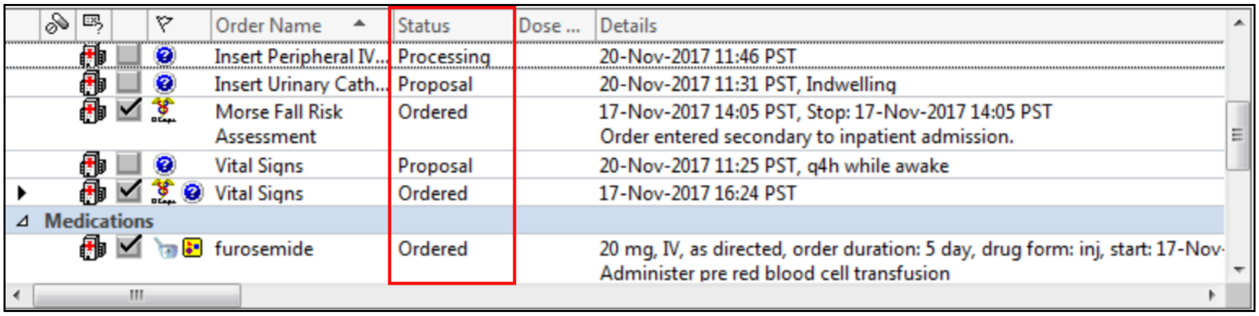
On the left side of the Orders Page is the Navigator (View) which includes several categories including:

- **Plans**
- **Categories of Orders**
- **Medication History**
- **Reconciliation History**

On the right side is the Order Profile where you can:

- Review the list of orders

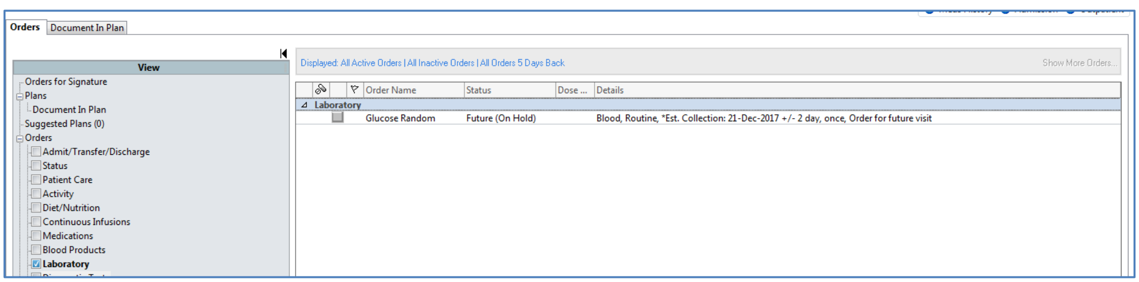
Moving the mouse over order icons allows you to hover to discover additional information. Orders are classified by status including:




**Processing** - order has been placed but the page needs to be refreshed to view updated status
**Ordered** - active order that can be acted upon
**Proposal** - are proposed by non-providers. These are suggestions sent for provider review and should not be acted upon until signed by a provider. Once signed, these will become active and status will change to Ordered as above
**Future** – An order that can be activated within a specified time range

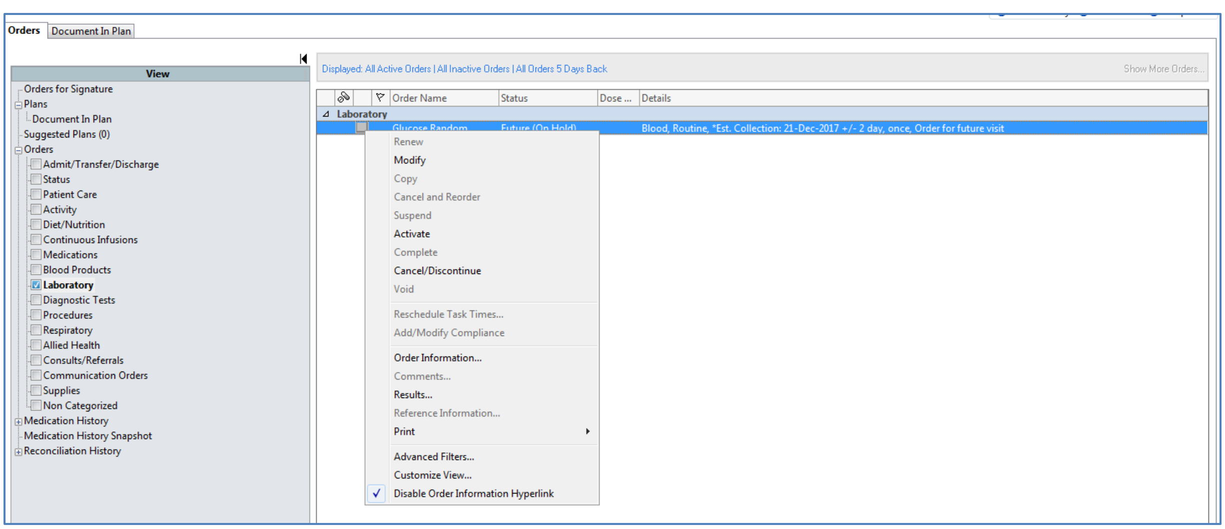
While on the **Orders** page:

1. Locate the **Laboratory** category to the left side of the screen under View.

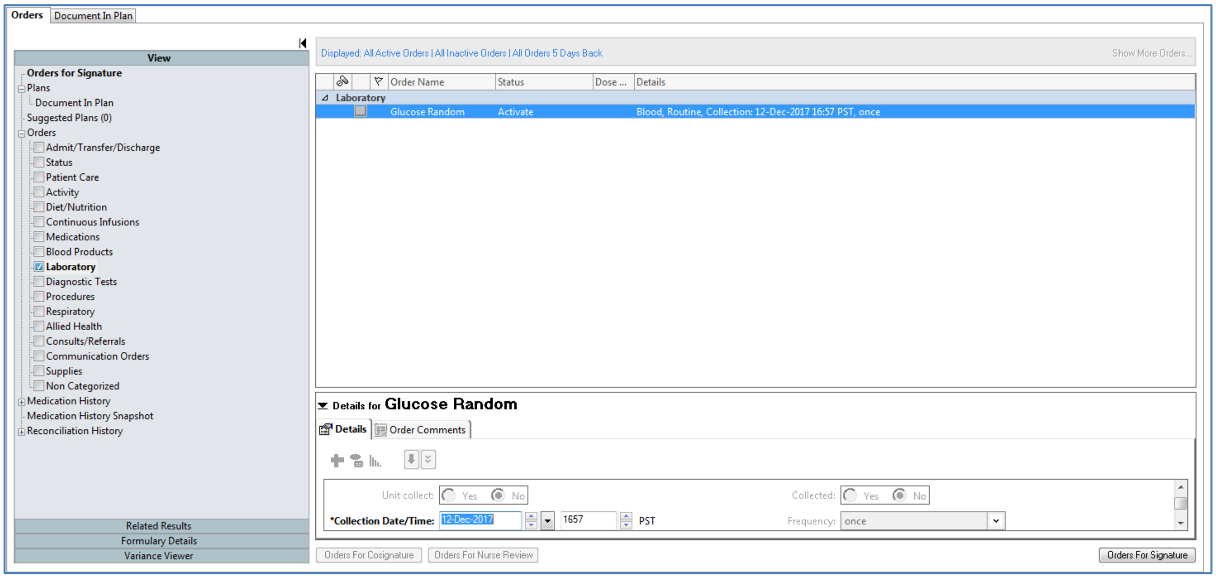


2. Review orders with a Status of **Future (On Hold)**

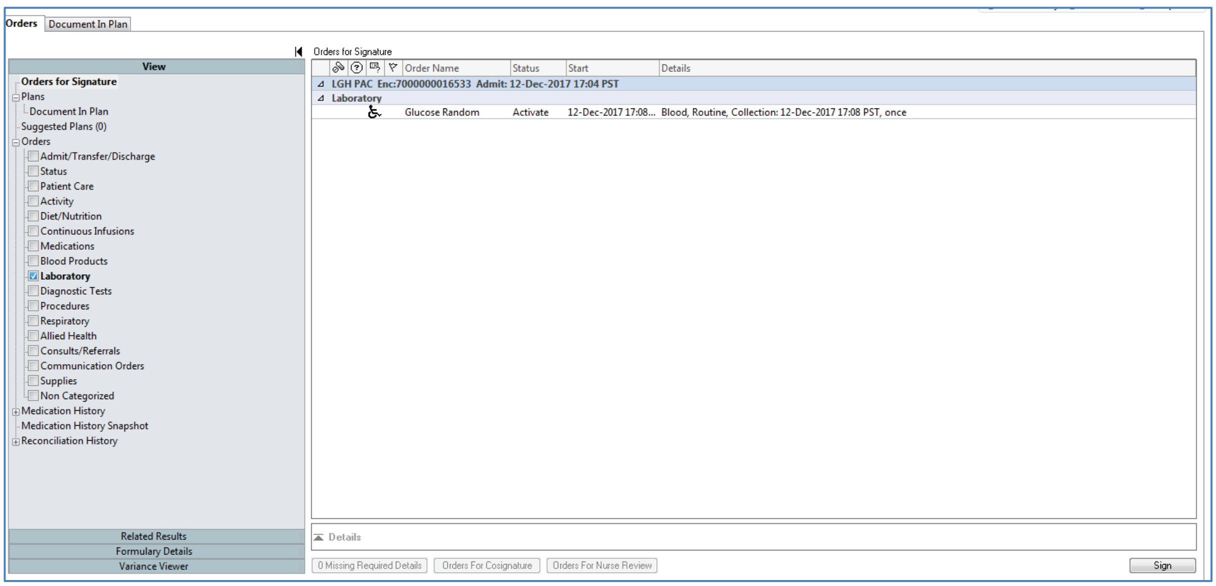
   **Note:** Only Activate Orders with a Status of **Future (On Hold)**



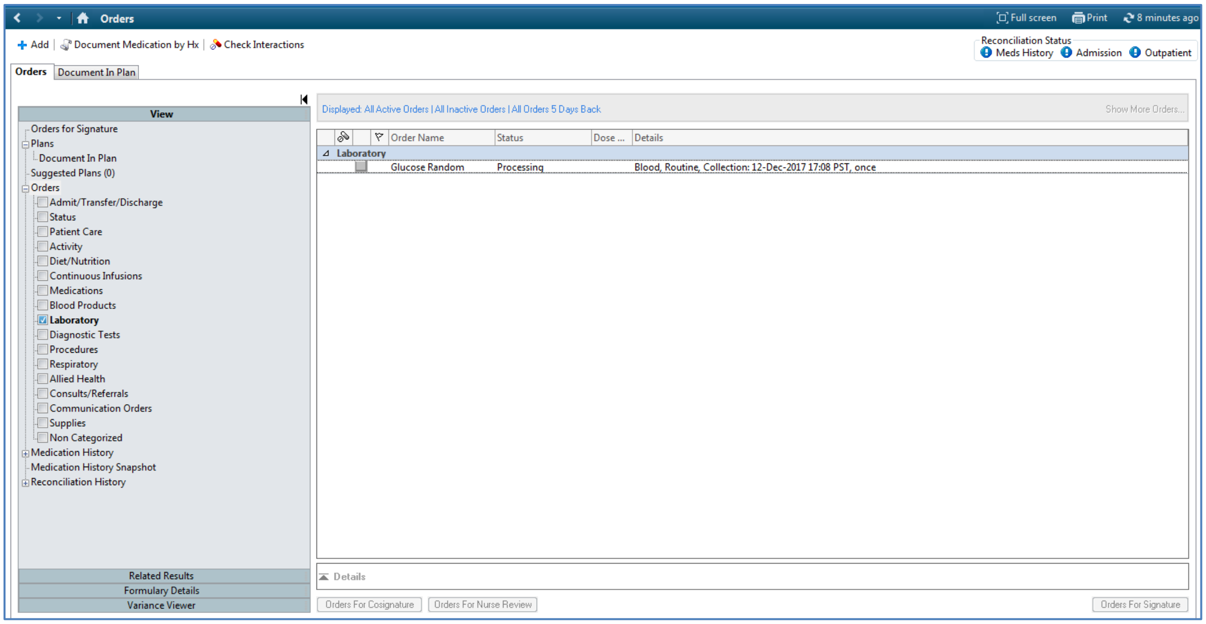
3. Right Click **Glucose Random Order**
4. Click **Activate**



5. Click **Orders For Signature**



6. Click **Sign**




7. Click **Refresh**

**Note:** Activating Order's allows them to pull into the **Patient Route Slip** (Refer to Activity 5.6). If the Order is not activated before printing the report, data will be missed.

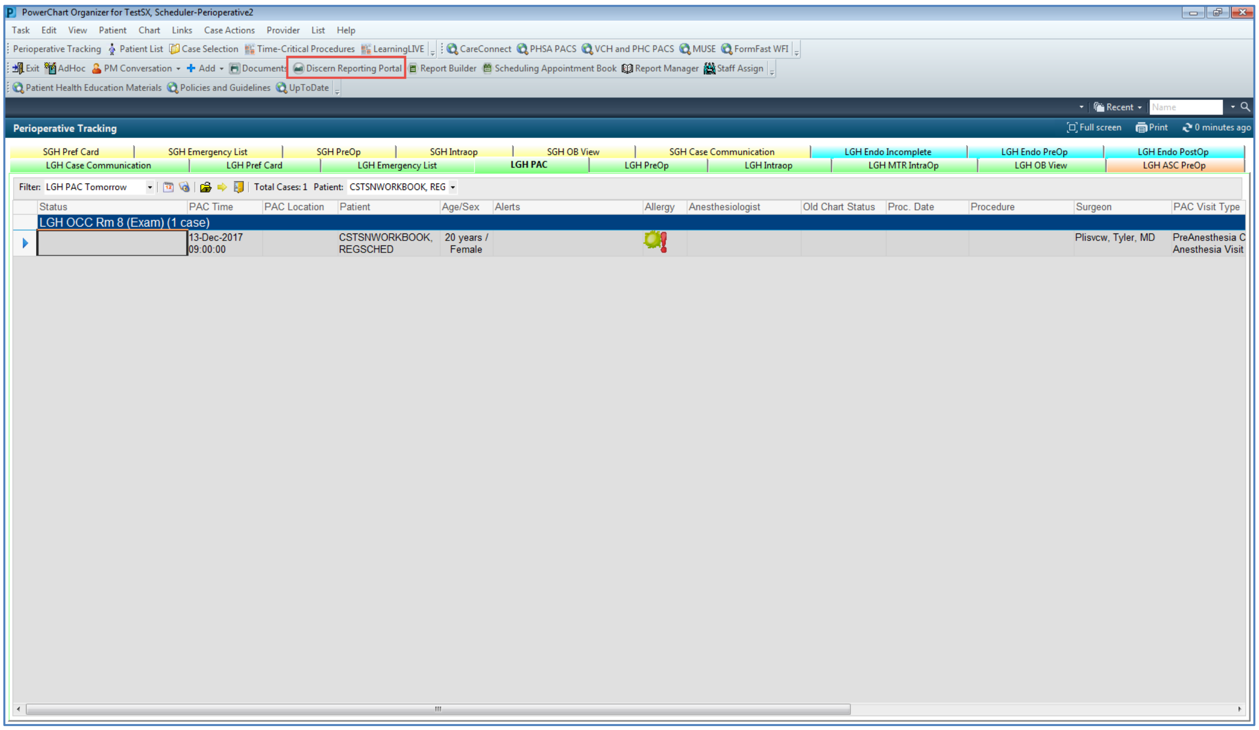
## Key Learning Points

- Orders with a status of Future (On Hold), are orders that will need to be Activated
- Activate Patient's Orders before printing the Patient Route Slip Report

# Activity 5.5 – Access the Patient Route Slip

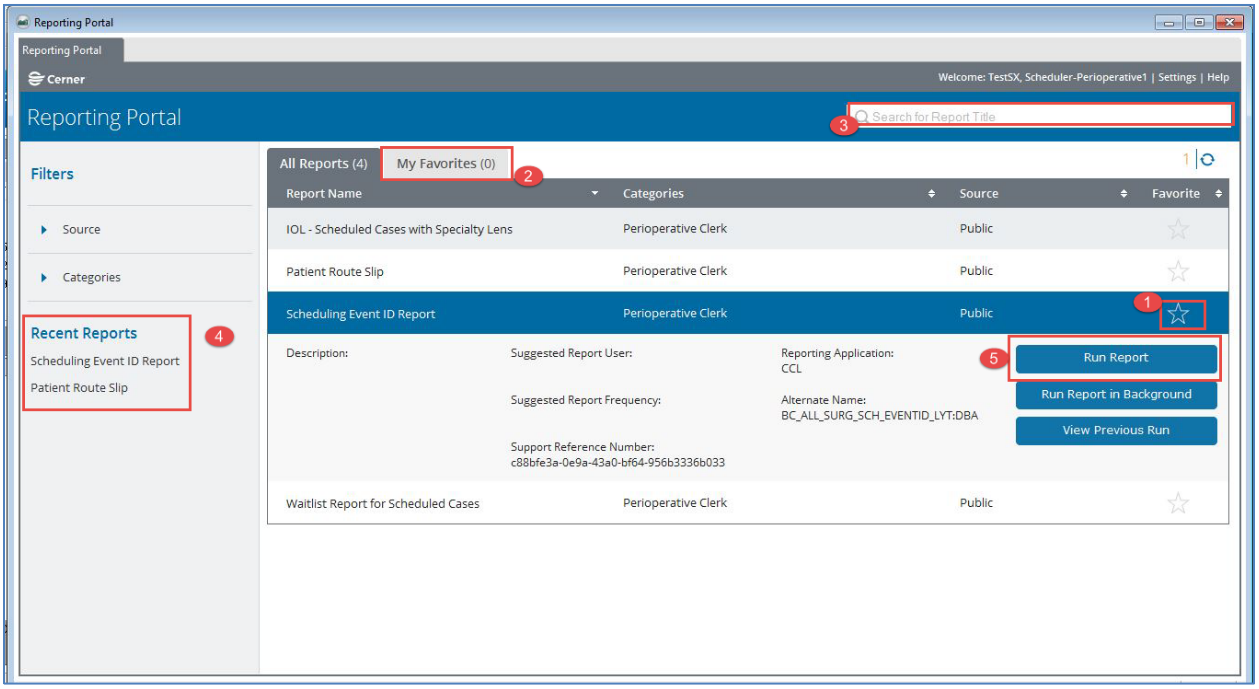
1

The PAC Clerk will need to run, view, and print reports. Reports live in **Discern Reporting Portal**. The PAC Clerk can access the reporting portal through PowerChart.
Login to PowerChart to begin the activity.




1. Click 

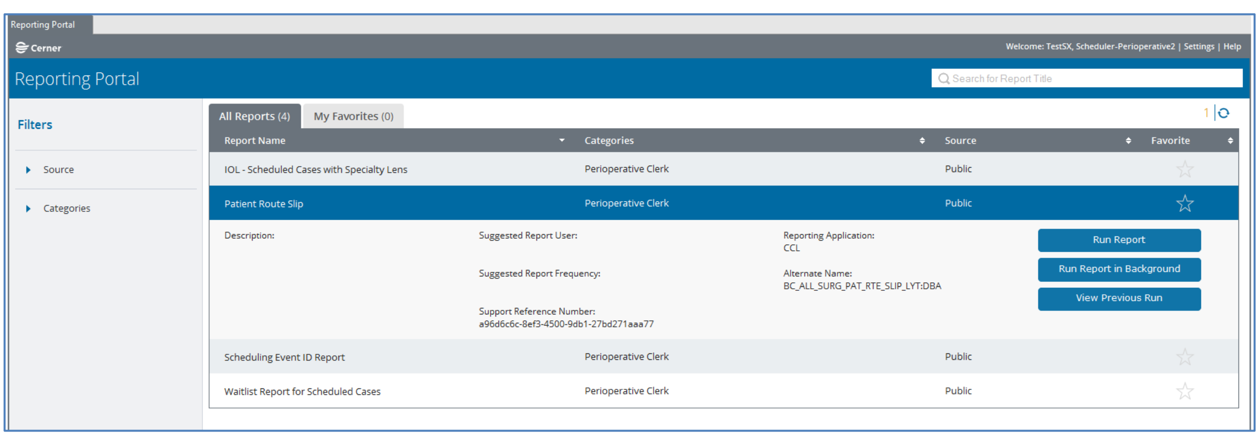
**Discern Reporting Portal**
   - **Discern Reporting Portal** will display



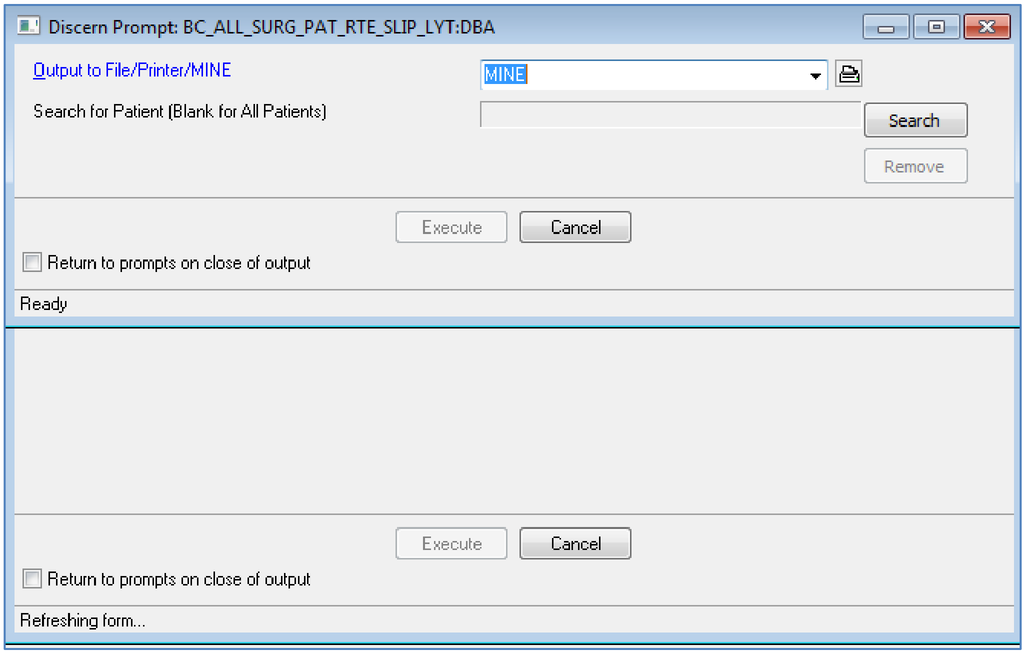

1. Favorite a report by clicking the star icon
2. Click the **My Favorites Tab** to view favorited reports
3. Search for reports in this window
4. Recently accessed reports display here
5. Run reports by selecting the **Run Report** button
    - New Tab will display with further entries related to the selected report

**Note:** The Reporting Portal will only display reports that your position has access to view.

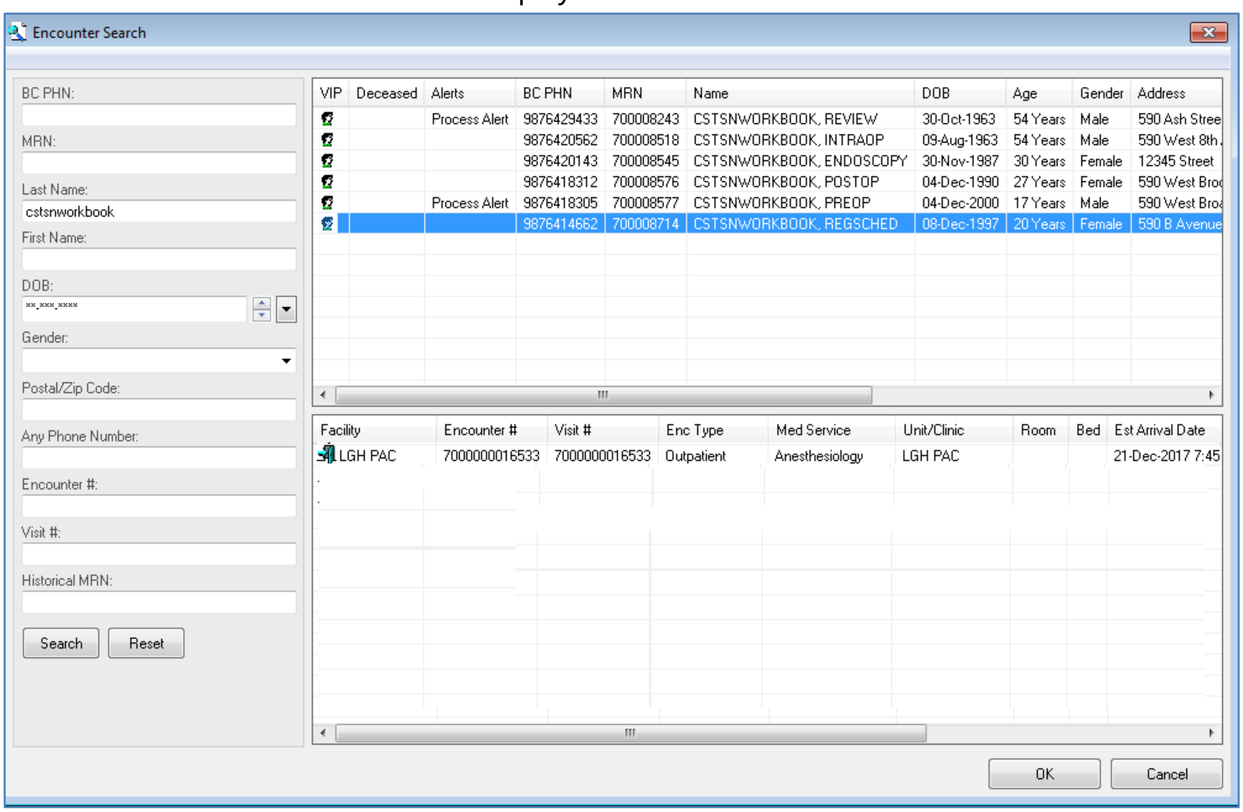
2 Accessing Patient Route Slip Report



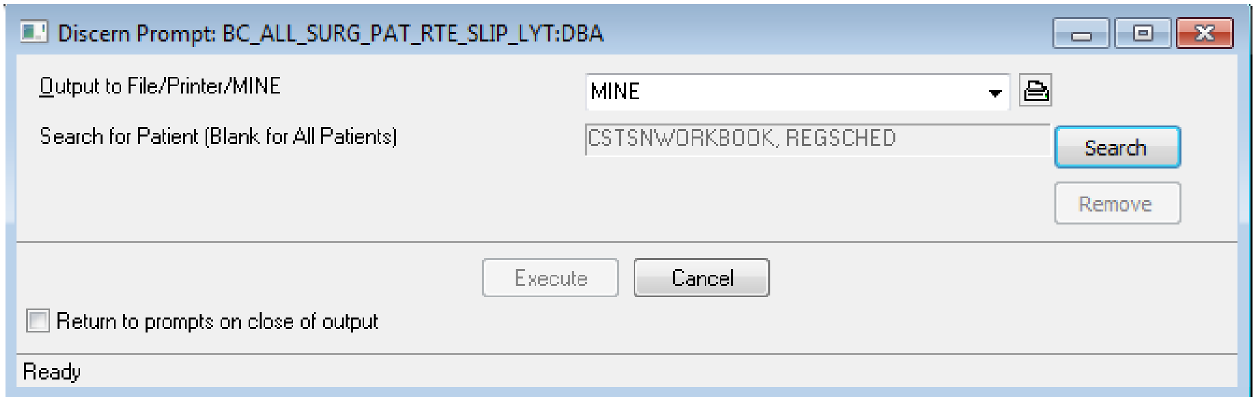

6. Click ***Patient Route Slip*** Report to highlight the row
7. Click **Run Report**
    - A New Tab will display with further entries related to the selected report



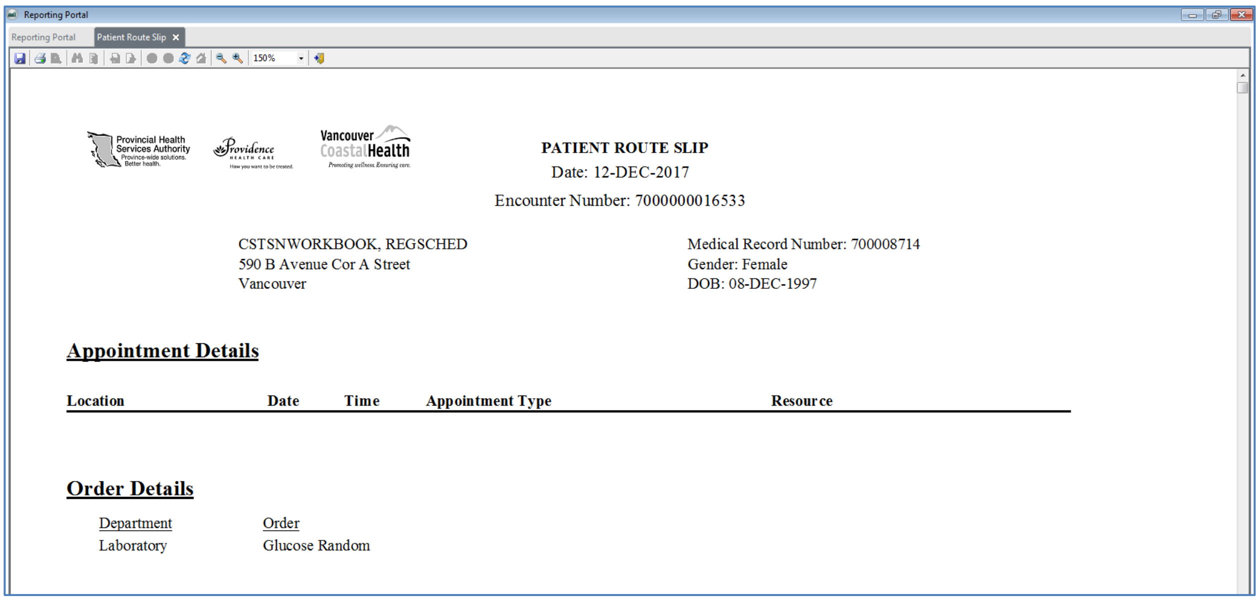

8. Click **Search**
    - Person Search window displays




9. Search for the patient
10. Select the corresponding patient record from **Person Search** window
11. Select the appropriate **Encounter**
12. Click **OK**




13. Click **Execute**




14. Click to close the report

## Key Learning Points

- A quick way to access **Discern Report Portal** is through the icon in PowerChart
- **Discern Reporting Portal** is a hub for Reports
- Access to reports are restricted by your position

# End of Workbook

You are ready for your Key Learning Review. Please contact your instructor for your Key Learning Review.