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	3
•	SCENARIO 1 – ALL CLERICAL POSITIONS	4
	Activity 1.1 – Create a Referral Encounter	5
	Activity 1.2 – Convert a Referral Encounter to a Surgical Pre Registration Encounter	ter7
	Activity 1.3 – Work Queue Monitor	11
	Activity 1.4 – Navigate Perioperative Tracking	17
	Activity 1.5 – Display and Navigate the Patient Chart	18
•	SCENARIO 2 – OR SCHEDULING CLERK	22
	Activity 2.1 – Navigating the SAF for an Elective Appointment	23
	Activity 2.2 – Request Lists / Request List Inquiry	28
	Activity 2.3 – Cancel A Confirmed Appointment	32
	Activity 2.4 – Postpone a Confirmed Appointment	34
	Activity 2.5 – Cancel Request	
	Activity 2.7 – Interfacility Transfer	48
	Activity 2.8 – Staff Assign	52
•	SCENARIO 3 – OR UNIT CLERK	56
	Activity 3.1 – Book an Emergency Appointment	57
	Activity 3.2 – Bumping Elective Appointment(s)	60
	Activity 3.3 - Book a Time-Critical Procedure Appointment	65
	Activity 3.4 – Reschedule Elective to Rapid	68
•	SCENARIO 4 – OR LOGGER POSITION	71
	Activity 4.1 – Implant Log Segment	72
•	SCENARIO 5 – PAC SCHEDULING CLERK	74
	Activity 5.1 – Request Lists / Request List Inquiry (PAC)	75
	Activity 5.2 – Perform a Surgical Case Check-In	87
	Activity 5.3 – Navigate Perioperative Tracking and Setting an Event	
	Activity 5.4 – Activate Orders	91
	Activity 5.5 – Access the Patient Route Slip	96



***** SELF-GUIDED PRACTICE WORKBOOK

Duration	8 hours
Before getting started	 Sign the attendance roster (this will ensure you get paid to attend the session) Put your cell phones on silent mode
Session Expectations	 This is a self-paced learning session A 15 min break time will be provided. You can take this break at any time during the session The workbook provides a compilation of different scenarios that are applicable to your work setting 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 This will involve completion of some specific activities that you have had an opportunity to practice through the scenarios.
DATASHEET	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.

Access Management Office												
<u>T</u> ask <u>V</u> iew <u>G</u> roups <u>H</u> elp												
a 🔒 🕱 🛛 🗐 🖏	🛞 🛅 🗑 🏟 As Of 8:45 🖗 Grou	os 🕶	R? Help									
Conversation												
👩 Add/Modify Person												
🚘 Bed Transfer	Search Person Search											×
Cancel Discharge												
Cancel Encounter			1 1	1.1								
Cancel Pending Transfer	You have not entered a valid combination	tion to se	earch on the	toreign s	ystem.							Llose
Discharge Encounter												
Facility Transfer	BC PHN:	VIP	Deceased	Alerts	BC PHN	MBN	Name	DOB	Age	Gender	Address	Address (2) City
🧔 Leave of Absence		2			9876414662	200008714	CSTSNWORKBOOK, REGSCHE	D 08-Dec-1997	20 Years	Female	590 B Avenue Cor A Stree	at 3 Vance
🚮 Modify Discharge	MBN:											-
🐣 Modify Discharged Surgical Patient												
🧔 Pending Facility Transfer	Last Name:											
Pending Transfer	CSTSNWORKBOOK											
Pre-Register Outpatient	First Name:											
Pre-Register Patient To A Be	REGSCHED											
🛊 Referral Management	DOB:											
🚔 Register Outpatient	NR ROLE ROCK											
👩 Register Patient To A Bed	Candan											
Surgery Waitlist	Liender:											
Update Patient Information	•	4					m					P.
View Encounter	Postal/Zip Code:	No en	counters fou	nd								
😰 View Person	ánu Phone Number											
	Any Filoric Humbon.											
	Encounter #:											
	Visit #:											
	Historical MRN:											
	Search Reset											
	MPI Search							•				
							OK	4 Ca	ancel	Previ	ew Add Person	Add Encounter

- 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.



🛉 Referral Management						
I a						
Medical Record Number: 700008714	Encounter Number:	Last Name: CSTSNWORKBOOK	First Name: REGSCHED		Middle Name:	Preferred Name:
Previous Last Name:	Date of Birth: 08-Dec-1997	Age: 20Y	Gender: Female	•	BC PHN: 9876414662	Pre-Reg Status:
Images		a Inurana Cumman Addi	ional Contrato Deferral Infe			
Encounter Type: Referral	Medical Service:	Reason for Visit: Surgery	Referral Source:	•		_
 Location Facility: LGH Lions Gate 	Building: LGH Lions Gate	Unit/Clinic: LGH SurgWaitLst	•			
Care Providers Attending Provider:	Primary Care Provider (PCP):	PCP Verified?:	Referring Provider:	<u></u>		
 Additional Information Visitor Status: 	-	5				
Comment Comment	•					
						·
Previous Comments:						×
L						Complete Cancel
Ready					PRODBC SXCS	TTEST.SCH3 08-Dec-2017 8:56

- 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

1



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

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.

W Access Management Office														
<u>Iask View Groups Help</u>														
😑 🚯 🗱 🗃 😥 👫 👀 🖻 🥯 🎝 As Of 14:14 🕼 Gro	oups 👻	R? Help												
Conversation														
Add/Modify Person Add/Modify Person														
Bed Transfer														
X Cancel Discharge														
🔁 Cancel Encounter	ation to s	earch on the I	ioreian :	sustem									C	ose
Cancel Pending Transfer				.,										
Discharge Encounter	VIP	Decessed	Alarte	RC PHN	MRN	Name		DOR	0.08	Gender	Address		Address (2	1 020
Facility Transfer		Doceased	MIDICO	0070414000	700000714	COTON: COD		00.0 1007	70g0	Cicildoi	500 D 4	0.00	2000	, city
Deave of Absence	w.			30/0414002	700006714	COTONWOR	NDUUN, NEUSUNEL	00-Dec-1337	20 reals	remale	JOU D AVE	nue cor A Street		varicouve
Modify Discharge														
Hodify Discharged Surgical Patient														
Pending Facility Transfer														
O Pending Transfer														
Pre-Register Outpatient First Name:														
Pre-Register Patient To A Bed REGSCHED														
Referral Management DOB:														
Register Outpatient														
g Register Patient To A Bed Gender:														
Surgery Waitist														
Update Patient Information Restal/Zin Code:	•										i.			4
View Encounter	Facil	ity	Enco	ounter #	Visit #	Enc Type	Med Service L	Jnit/Clinic	Room	Bed Est	Arrival Date	Reg Date Di	sch Date Al	tending Provi
2 View Person	30	GH Lions Gat	e 7000	000016284	70000000162	34 Referral	General Surgery L	.GH SurdWaitLst						
Any mone number:									4					
Encounter #:														
Visit #:														
Historical MRN:														
Search Heset														
MPI Search	1													•
Mi i Sedicit								5						
							0	эк 💙 📃	Cancel		Preview	Add Pers	on Ad	d Encounter

- 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	
Eind	
By <u>E</u> ligible Plans By Spo <u>n</u> sor By <u>P</u> l	an Name By C <u>a</u> rrier By <u>P</u> lan Alias
Search by: O Contains	─ Starts With
Search for health plan:	
BL	
BC Resident MSP PHN Contact Informa	tion
Type Address	Phone Number
SEE CARD, , British Columbia	
Add New>>	
	OK Cancel More Info >>> More

• 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 the stay of the patient in				
Estimated Length of Stay	the hospital.				
	Put '0' for Day Surgery procedures				
Bed Type	Bed requirement for the case. E.g., ICU Bed				
Monitoring	Patient condition that requires monitoring				
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	Status of if patient has been assessed by				
a multi-disciplinary team?	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				
Linavailable Reason 1	Patient's reason for being unavailable, either				
	Medical, Personal, Vacation, Work or Other				
Linavailable Reason Commont	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.

🄄 Add/Modify Work Item						x
Task View Work Item Help						
i 🚨 📴 📑 📲 - 🔈 🎄 🚺 🕞 📄 i 🍩 i						
	Patient Name: MRN:	DOB: Age:		Encounter Ty FIN:	ype:	
Location:	Dec/08/2017 09:30:47	CST Project Office	e 604-675-2513	1/3		
LGH Lions Gate Hospital//LGH Lions Gate Hospital//LGH Morgue	Vancouver CoastalHealth Prov	Provincial Health Services Authority	REGIONAL OR BO	OKING FORM		
Document type:	Hospital Use Only Required Fie MRN	Ids - Bolded Sections Acct #	Site: Booking Form Received Date	ORMIS#	Page 1	
· ··· ·	LEGAL SURNAME	FIRST NAME	MIDDLE NAME	OR DATE		
Subject:	PHN		Date of Birth (Marcorryny)	Gender	E Page 2	
Priority	Address	City	Province	Postal Code Country		
Boutine	relephone Home	Vvork	CellPOther	Local Contact Number		
Specialties :	Family Physician		Referral Date (MM/DOUTYY)	1		
SN General	Referring Physician		First Consult Date and to my)	Page 3	
SN - ENT	Self Referral		Surgery Decision Date and more and the surgery Decision Date and the surgery Decision Date of the surgery date of th			
SN - General SN - GYN	Parmy Prysician Surgeon same specialty Surgeon different special Other specialist	as booking surgeon ty as booking surgeon	If cancer proven: Has patient been assessed proteam?	-operatively by a multi-disciplinary		
SN - Minor Procedure SN - Neuro	BILLING INFORMATION (IT	not MSP)	Indicate clinical stage: 1 [Is this a recurrent cancer?	II III II V Not Known Yes No		
SN - Oral Max-Dental	Billing # / Information		SPECIAL POST OP BED REC	UIREMENTS		
SN - Plastics	ADMISSION STATUS	Discharge Same Davi (DSD)	High Acuity Unit (PHC Only)		
	Day Surgery Short Stay (DSS) (RH Only) prior to OR data ELOS dave	Overnight Monitoring PAR	PHC & VGH Only)		
Referring physician:	Same Day Admit (SDA),	ELOS days	SCO Bed (LGH Only) SOU Bed (UBCH Only)	M		
	PROCEDURE	PROCEDURE (Include Side)	SUR	GEON ASSISTANT		
Status:	CODE				- 🖌 🖻 🖷 🗙 🖒	5
Reason:	(+ + + +)	Page 1 of 3 🔍 🔍	🔟 - 👌 🖒 🎽 🏷 🕉	/ 🗞 🕵 🗖 • 🗃 🐰 🗈	× 🖲 ℓ 🖒 ∧ × 🗞	
· · · ·					OK Cancel	

- 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





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

K	<u>C</u> lear Filter From "Specialties" Text <u>F</u> ilters ▶
	Search 🔎
	···· ☑ (Select All) ···· ☑ SN - General ···· 〗 SN - Minor Procedure ··· 〗 SN - Neuro ···· 〗 (Blanks)
	OK Cancel

- 1. Click the Filter (\mathbf{V}) 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

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 (¹) icon.

Add/Modify Work Item							
Task View Work Item Help							
🚨 📴 🖃 - 🍛 🕹 😰 📄 🔒	> 🗈 🧿						
	Patient	Name:	DOB:		Encounter	Туре:	
	MRN:		Age:		FIN:		
Location:	<u>^</u>	Dec/08/2017 09:30:47	CST Project Offic	e 604-675-2513	1/3	<u>^</u>	
GH Lions Gate Hospital//LGH Lions		Vancouver CoastaiHealth	Providence Provincial Health Bervices Authority	REGIONAL OR B	OOKING FORM		
water notipitality continengate		Hospital Use Only Require	ed Fields - Bolded Sections	Site:			Rano 1
Document type:		MRN	Acct#	Booking Form Received Dat	ORMIS#		rager
···· •	E	LEGAL SURNAME	FIRST NAME	MIDDLE NAME	OR DATE	-	
Subject:		PHN		Date of Birth (Neuropryyny)	Gender		
		Address	City	Province	Postal Code Country		
Priority:		Telephone Home	Work	Cell/Other	Local Contact Number		
Routine -		Family Physician		Referral Date and man			
Specialties :		Referring Physician		First Consult Date www.mouro		,	
SN - General 👻 📖		REFERRING PHYSICI	AN	Surgery Decision Date europ		- 3	
Queue Routing :		E Family Physician	ale a la la la sur a	CANCER ON Not Suspecte	d 🗋 Suspected 🔲 Proven		
IGH SURG All Other Services		Surgeon same speci Surgeon different sp	arry as booking surgeon eciality as booking surgeon	Has patient been assessed ;	pre-operatively by a multi-disciplina	<i>η</i> .	
		BILLING INFORMATIO	N (If not MSP)	Indicate clinical stage:		«n .	
Last Contact		Billing # / Information	BC Self Other	SPECIAL POST OP BED R	EQUIREMENTS		
×		ADMISSION STATUS		GU Bed	nije		
-		Day Surgical Day Care (5	SDC), Discharge Same Day (DSD) Itay (DSS) (RH Only)	NCCU (LGH Only) Overnight Monitoring PAi	R IPHC & VGH Only)		
Referring physician:		Admit Priord	lays prior to OR date, ELOS days DA), ELOS days	SCO Bed (LGH Only)			
٩,		Inpatient/Already in I	hospital	Special Care Unit (VGH C	Drily)		
Status:		CODE	PROCEDURE (Include Side)	su	RGEON ASSISTAN	et i	
Available				. 1			
Reason:	 4	•	Page 1 of 1 🔍 🔍	፱-002≥2/	2/ 😼 🕼 🖬 + 🗃 🖻	ا 🖉 🕈	<u>n ≣ 0 0 €</u>
						Next	Cancel
	T						

3



- 4. Click Select a Patient (²) icon
 - Person Search window displays

Process Alert Process Alert	9876429433 9876420562 9876420143 9876418312 9876418305 9876414662	700008243 700008518 700008545 700008576 700008577 700008714	CSTSNWORKBOOK, RE CSTSNWORKBOOK, INT CSTSNWORKBOOK, EN CSTSNWORKBOOK, PR CSTSNWORKBOOK, PR CSTSNWORKBOOK, RE	VIEW RAOP DOSCOPY STOP EOP GSCHED	30-Oct-1963 09-Aug-1963 30-Nov-1987 04-Dec-1990 04-Dec-2000 08-Dec-1997	54 Years 54 Years 30 Years 27 Years 17 Years 20 Years	Male Male Female Female Male Female	590 Ash Street 590 West 8th A 12345 Street 590 West Brool 590 West Brool 590 B Avenue I	.ve k St dway Cor A Street	cor 8th #
Process Alert	9876420562 9876420143 9876418312 9876418305 9876414662	700008518 700008545 700008576 700008577 700008514	CSTSNWORKBOOK, INT CSTSNWORKBOOK, EN CSTSNWORKBOOK, PO CSTSNWORKBOOK, PEI CSTSNWORKBOOK, REI	RAOP DOSCOPY STOP EOP GSCHED	09-Aug-1963 30-Nov-1987 04-Dec-1990 04-Dec-2000 08-Dec-1997	54 Years 30 Years 27 Years 17 Years 20 Years	Male Female Female Male Female	590 West 8th A 12345 Street 590 West Broo 590 West Broa 590 B Avenue 1	k St dway Cor A Street	
Process Alert	9876420143 9876418312 9876418305 9876414662	700008545 700008576 700008577 700008714	CSTSNWORKBOOK, EN CSTSNWORKBOOK, PO CSTSNWORKBOOK, PRI CSTSNWORKBOOK, REI	DOSCOPY STOP EOP GSCHED	30-Nov-1987 04-Dec-1990 04-Dec-2000 08-Dec-1997	30 Years 27 Years 17 Years 20 Years	Female Female Male Female	12345 Street 590 West Broa 590 West Broa 590 B Avenue	k St dway Cor A Street	
Process Alert	9876418312 9876418305 9876414662	700008576 700008577 700008714	CSTSNWORKBOOK, PO CSTSNWORKBOOK, PRI CSTSNWORKBOOK, REI	STOP EOP GSCHED	04-Dec-1990 04-Dec-2000 08-Dec-1997	27 Years 17 Years 20 Years	Female Male Female	590 West Broo 590 West Broa 590 B Avenue	k St dway Cor A Street	
Process Alert	9876418305 9876414662	700008577 700008714	CSTSNWORKBOOK, PRI CSTSNWORKBOOK, RE	EOP GSCHED	04-Dec-2000 08-Dec-1997	17 Years 20 Years	Male Female	590 West Broa 590 B Avenue	dway Cor A Street	
	9876414662	700008714	CSTSNWORKBOOK, RE	GSCHED	08-Dec-1997	20 Years	Female	590 B Avenue	Cor A Street	
	,							, ,		
Encounter ‡	Visit #	End	Type Med Service	Unit/Clinic	Room	Bed Est	Arrival Da	te Reg Date	Disch Date	Attendir
ions Gate 700000001	5284 700000	0016284 Ref	erral General Surgery	LGH SurgW-	aitLst					
ic	Encounter #	Encounter # Visit # vnii Gate 7000000016284 700000	Encourter # Visit # Enc vn: Gate 7000000015284 7000000015284 Ref	Encounter # Visit # Enc Type Med Service nn: Gale 7000000015284 7000000015284 Referral General Surgery	Encounter # Visit # Enc Type Med Service Unit/Clinic nrs Gate 7000000016284 7000000016284 Referral General Surgery LGH Surgiv	Encounter # Visit # Enc Type Med Service Unit/Clinic Room. nrs Gate 7000000016284 7000000016284 Retenat General Surgery LGH Surg/Walt.tt	Encounter # Visit # Enc Type Med Service Unit/Clinic Room Bed Est	Encounter # Visit # Enc Type Med Service Unit/Clinic Room Bed Est Arrival Da nr: Gate 7000000016284 7000000016284 Referral General Surgery LGH Surg/valLat	Encourter # Visk # Enc Type Med Service Unit/Clinic Room Bed Est Arrival Date Reg Date nr: Gate 7000000016284 7000000016284 Referral General Surgery LGH SurgWatLat Encourter # Comparison of the strain of the surgWatLat Encourter # Comparison of the surgWatLat # Comparison of	Encounter # Visit # Enc Type Med Service Unit/Clinic Room Bed Est Arrival Date Reg Date Disch Date nr: Gate 700000016284 7000000016284 Reternal General Surgery LGH SurgWalLst Control Control Contr

- 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.

🚯 Add/Modify Work Item				
Task View Work Item Help				
🚨 🗉 🖷 • 🔿 🌲 😰 🗟 📾 🗈 🐻				
CSTSNWORKBOOK, REGSCHED	Patient Name: CSTSNWORKBOOK, REGSCHED MRN: 700008714	DOB: 08-Dec-1997 Age: 20 years	Encounter Type: Referral FIN: 700000016284	

- 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.



Add/Modify Work Item					
Task View Work Item Help					
i 🚨 🕮 📑 🎴 • 🍛 🚸 😰 🕒 📄 🚳 🗈 💿					
CSTSNWORKBOOK, REGSCHED	Patient Name: CSTSNWORKBOOK, R MRN: 700008714	EGSCHED DOB: 08- Age: 20 yr	Dec-1997 pars	Encounter Type: Refer FIN: 7000000016284	nı
Location: LGH Lions Gate Hospital//LGH Lions Gate Hospital//LGH Morgue	Dec/08/2017 09:30:47	CST Project Offic	REGIONAL OR BO	1/3 OKING FORM	A District of the second secon
Surgery Booking Form	Hospital Use Only Required Fields - Bol MRN A	ided Sections cot #	Site: Booking Form Received Date	ORMIS#	E
Priority:		FIRST NAME	MIDDLE NAME	OR DATE	
Specialties :	Address	City	Province	Denider F Postal Code Country	
Queue Routing :	Telephone Home Work		Cell/Other	Local Contact Number	*
Last Contact	Family Physician		Referral Date (MM / DD / YYY)		
	Referring Physician REFERRING PHYSICIAN		First Consult Date (MM / DD / YYY)		
Referring physician:	Self Referral Family Physician Surgeon same specialty as book Surgeon different specialty as to Other specialist BILLING INFORMATION (If not MSF WorkSafe BC ICBC Self Billing # / Information	ing surgeon woking surgeon) Other	CANCER Not Suspected If cancer proven: Has patient been assessed pre- team? I Yes No Indicate clinical stage: I I Is this a recurrent cancer? SPECIAL POST OP BED REQ ICI I Bed	Suspected Proven Suspected Proven operatively by a multi-disciplinary II III IV Not Known WIREMENTS	
Comment:	ADMISSION STATUS	R @-00 ≥ 2 2 %	High Acuity Unit (PHC Only)		- BB - O C BA
Date of service +					Next Cancel

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

• Document Type Search window displays

ocument type:			
Surgery Booking Form			
jubject:			
)ocument <u>a</u> lias:			
esults:			
Document type	Subject	Document Alias	
Surgery Booking Form	BCCA OR Booking Form	2181	
Surgery Booking Form	Regional OR Booking Form	121	
Surgery Booking Form	Late and/or Incomplete Booking Package	1441	

- 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:

Alert		23
?	The system cannot allow provider actions when a status of Complete, a person or encounter, and a clinical document type are not selected. Provider actions will be removed. Continue?	
	Yes No	



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.

Task Edit View Patient Chart Links CaseActions Provider List Help										
Perioperative Tracking 🔤 Message Centre 🙀 Patient List Dynamic Case Tracking 🞇 Pref Card Picklist 🕲 Case Selection 🖺 Time-Critical Procedures 🐃 Day of Surgery View 🞇 Historical View 🞇 Learning UNE 💧 🗒 CareConnect 🔞 PHSA PACS 🎕 VCH and PHC PACS 🎕 MUSE 🎕 FormFast WR										
📲 East 👹 AdHoc 🞟 Medication Administration 🔒 PM Conversation - 🎍 Communicate - 📄 Medical Record Request 💠 Add - 着 Scheduling Appointment Book 🛞 Documents 🎇 Staff Assign 🙊 Preference Card Maintenance 着 Report Builder 🔬 Discern Reporting Portal 🏨 Report Manager 📴 (Aware										
Q Patient Health Education Materials Q Policies and Guidelines Q UpToDate										
CSTSNWORKBOOK REVIEW										
[c] full screen										
SCH Introp SCH Phase I LCH ASC										
Filter: LGH Preop Today 🔹 🔹 🔞 🙀 🛸 🔋 Total Case: 2										
Status Sched. Start Start Stop Add Pt. Type CK iso Alerts Allergy Patient Age Procedure Surgeon PreOp Nurse Scheduling Comments										
LGHOR GRV (1 case)										
072-Dec-2017 08:00 09:27 Day Surgery Di CSTPRODBCSN, ANESTHESIA 47 years "Right Hemia Inguinal" Hunter, J										
LGHOR KC (1 case)										
07-Dec-2017 14.00 15.00 Pre-Day Sun 14.00:00 CSTSINWORKBOCK, REVIEW 54 years Repair Right Hemia Inguinal Plissce, T										

- 1. Login to PowerChart to access Perioperative Tracking.
- 2. Any time you need to navigate back to Perioperative Tracking you can click Perioperative Tracking 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

		🝷 🛛 🍋 Recei	nt 🚽 🛛 Name	<u> </u>
		[□] Full screen	Print	€ 0 minutes ago
ido Incomplete	LGH Endo Pre	Ор	LGH Endo	PostOp
	I LOUGDY	· 'r		

- 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

P Assign a Relationship
For Patient: CSTSNWORKBOOK, REGSCHED
Relationships:
Clinical Support Scheduling Clerk
5
OK Cancel

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



CSTSNWORKBOOK	REGSCHED - 70	0008714 Opened by Test5X. Schedule	rr-Perioperative3	_							- 6
Task Edit View P	atient Chart	Links Navigation Help									Contract Contract Contract
Perioperative Tracking	4 Patient List	Case Selection STime-Critica	Procedures KLearningLIVE	Connect	C PHSA PACS C VCH and PH	IC PACS 👸 MUSE 👸 Form	Fast WFI				
Tear Off	AdHoc & PI	M Conversation + + Add + H Doc	uments 🚘 Discern Reporting Portal 💼 Repo	ert Build	er 🕅 Scheduling Appointment B	look 🕼 Report Manager 🕌	Staff Assign				
Patient Health Educa	ation Materials	O Policies and Guidelines O UpTo	oDate _								
CSTSNWORKBOO	K. REGSCH	ED R							List	Recent -	laime .
CSTSNWORKBOO	K, REGSCH	IED DOB:08-Dec Age-20 year	-1997 MRN:700008714 s Enc:700000016443	Coc	de Status:	Pr Di	ocess: sease:		Location:LGH PA Enc Type:Pre-Out	I C patient	
Allergies: Allergies N	ot Recorded	Gender:Fem	ale PHN:9876414662		sing Wt:		plation:		Attending:		
Menu	•	S 🔹 🕈 Perioperativ	a Summary						<u>,0</u> ,	Full screen 🗌 🗐 🖻	2 0 minutes
Perioperative Summar	y .	🗚 🗎 🖥 🎥 🔍 🔍 100%	- 0 0 G								
Perioperative Doc		Preop Summary	11 Intraop Summary	23	Postop Summary	23 Quick Orders	53	Handoff Tool	£3 +		- • · · =
Patient Information	- A44	Procedural Information		• •	PowerForms (0) 🐥 🚽		≣• ⊙	Preoperative Checklis	1		≡• ♠
Form Browser								Selected visit			
CareConnect		Case Number: Primary Procedure:	LGHOR-2017-1721 Open Reduction Internal Eixation Hin		Vital Signs 💠 👻		≡• ∞	NPO			\$
Alleraies		standary troccounter	Dynamic Hip Screw		Selected visit 🖝			Consents	*		\$
Diagonses and Problems		Surgical Free Text:	Open Reduction Internal Fixation Hip		No results found			ECG	<u>A</u>		0.0
Histories		Anesthesia Type(s):	Defer to Anesthesia		Labs		Er o	ID Verification	2		-
Paralle Daview		Surgery Start:			Celected visit			Site Verification			0
Order	-	Surgery Stop:	-		No could found						-
Berlansenting Des	- maa	Anesth Start:			140 LISTORS (OUTIN			Outstanding Orders (0		=- ~
Peroperative Doc		Anesta Stop:			Measurements and Weig	hts (0)	≡• 🔦	Selected visit			
		Allergies (0) 🐳		• •	Selected visit			No results found			
		All Visits			No results found			Clinical Research (0)			=- @
		No results found			(Annual Section of the section of th			C			
					Nome Medications (0)			No results found	ON BRAN	2000	Constant.
		Diagnoses	-	- •	Medications		≡• 🍝				
		Selected visit			Selected visit			Perioperative Trackin			=- ~
		No results found			⊿ Scheduled (0)			Anticipated Start Dt/Tm	12/12	/17 12:00	
		Problems	-		⊿ Continuous (0)			Anticipated Duration	60		
		All Visits		and a state of the	4 PRN/Unscheduled Available	(0)		Operating Room	LGHO	R CAT2	
		Classification: All			 Administered (0) Last 24 hor A Surmanded (0) 	85		Public Sched Comment			
					 Discontinued (0) Last 24 hot 	#3		Friedue Scheo Committent			
		Problem						Documents (2) 🔶			=• ~

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.

COMMON DATA								iare +
Westweise Allergies	DOBIECO (1983) AgeCH year) CondectMate	Anity Topological State		Code Status During Mr.	Protect Declary Protections Decease Declaration		Leader Life Legiturian Inc Type Pre-Cas Surpey Intending	
A Print Parties	versitive Summary		_				X full area	5 22
ABIRDINA	100.002							
Prep Scentury	11 (10104-5	and a second sec	11.0	ette Serenary III Quick Only	Nami II Hand	1 facel	H. 6	200
Concession of the local division of the loca	**			Possilium II 🔶 🖛	1040	Prosperative Checkfed		
Con Montain Regist There Test Methods Test Test Methods Test Test Test Test Test Test Test Test	Generative Repair flog Generative Photos IV - - - - -	ur Lindu Mara Dopula Hi Hama Dopula Nethera Ann, MD		And a set of		MO Consetto 400 INM 20 setfuzione 544 verticatione 544 verticatione 10 setfuzione 10 s	# 4 # #	100 ()
And In Court Performent	inges -			Re coude formed		Glucios Kandom	Pulare	26/10/17 202
			No. Co	Street March attach (1) :	24.5	Clock of Research (11)		
I Salected use Salected state				Contraction (- K. +	the results beaut		
(Contraction)			-	at Scheduled (1)		Prosperator linebarg		
A ten Contrator A 				A Continues (0) Continues (0) Continues (0) Continues (0) Continues (0)		Antoquenel Dart Dy'tre Antoquenel Daratise Opending Rues Pablic Sched Comment Hinute Sched Comment	87(12)(17 14:00 88 129408 KC	
1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1			_	and a second sec		Access to a de		

- 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:

3



- 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.

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

CSTSNWORKBOOK,	REGSCH	ED 🖬							🔶 List 🚽 🤷 Reco	ent • Name • Q
CSTSNWORKBOOK	REGSCH	ED	DOB08-Dec-1997	MRN:700008714 Enc:700000016443	Code Status:		Process: Disease		Location:LGH PAC	
Allergies: Allergies Not	Recorded		Gender:Female	PHN:9876414662	Dosing Wt:		Isolation:		Attending:	
Menu	9	K > + 👘	Documentation						[0] Full screen	📅 Print 👌 O minutes ago
Perioperative Summary		Add Mr Sign	Enrward Provid	er Letter	er = It in Front	Preview				
Perioperative Doc		list	And other states of the states of	and a second sec	A 1 met met to solo 1					4.5
Patient Information		LBL								
Documentation	🕈 Add	Display : All	•						같 Pre	vious Note 📑 Next Note
Form Browser			· ·	11-11-11-11-11-11-11-11-11-11-11-11-11-		Dec/08/2017 09:30:47	CST Droject Off	ce 604.675.2513	10	and Descentrally
CareConnect		Arranged By: Dat	te a Form	08-Dec-2017.08-	436 PS1	Decroa/2017 02:30 47	Gon Project On	1	110	
Allergies		Regional OR Boo	king Form			vancouver the P	Provincial Health	REGIONAL OR BO	OKING FORM	
Diagnoses and Problems		Consent Proced	ure al co Succional Administra	08-Dec-2017 08:	4:36 PST	Loastaineattn	The case of American		1	Page 1
Histories		Consent medici	ar or sorgicel, Administre			MRN	Acct #	Booking Form Received Date	LORMIS #	100
Results Review						020032	1.1864 B	and the second second second	100000	E
Orders	+ Add					LEGAL SURNAME	FIRST NAME	MIDDLE NAME	OR DATE	
						PHN		Date of Birth perropryry	Gender	
						Address	Cr	ly Province P	ostal Code Country	
						Telephone Home	Work	Cell/Other	Local Contact Number	***
						Family Physician		Referral Date pourcourne		
						Referring Physician		First Consult Date (ww/co/mme		
						REFERRING PHYSICIAN		Surgery Decision Date meaning		
						Family Physician Surgeon same specially a Surgeon different special Other specialist	as booking surgeon ty as booking surgeon	CANCER Not Suspected If cancer proven: Has putient been assessed pro- team? Yes No_	Suspected Proven	
						BILLING INFORMATION (# WorkSafe BC] ICBC Billing # / Information	not MSP) Self Other	Indicate clinical stage: 1 1 Is this a recurrent cancer? 1 1 SPECIAL POST OP BED RECK	II III IV INCLENCEN	
						ADMISSION STATUS	21	High Acuty Unit (PHC On)		-
					14 4			08299880	• 🖬 🖻 🔗	B2 110
						and a state				10
		C Distance -	last vv							(*)
		A CETERIOUS IN	COM //							



- 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

1



Activity 2.1 – Navigating the SAF for an Elective Appointment

Login to Schapptbook to launch the Scheduling Appointment Book

Books Appointment	1
Bookshelf - LGH Department of Perioperative Services	Open
CH Main OR LGH MTR LGH Labor and Deli LGH Ort of OR LGH PreAnesthesia	Select

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

Books Appointment		
*Person name:	2	Move 🕨
*Appointment type:		Next
Surgery		Clear
*Appointment location:		Allergies
	-	



	Appointment Type Help	x
Ap	opointment Type	
	Surgery	
	Surgery Anes Out of OR/Non-Surgical	
	Surgery Endoscopy	
	Surgery Minor Procedure	
	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	
	Current DAC und Companying	
	OK Cancel	

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)



Appointment Attributes	2	×
CSTSNWORKBOOK, REGSCHED	Details Orders Resource List Guidelines Pref Cards Appointment Eligibility	_
	CSTSNWORKBOOK, REGSCHED Primary Surgeon: Pisvew, Tyler, MD	-
	Repair Hernia Inguinal Requested Start:	
	*Primary Procedure ?:	Е
	Yes Modfiler 1(Laterality/Body Part/Approach):	
	Search Easting Orders Privileges AOS Required Nomen (* >>	
	Repair Hemia Inguinal Modifier 3:	
	Repair Hemia Inguinal Bilateral Repair Hemia Inguinal Right Repair Hemia Inguinal - RIGHT	
	Repair Hemia Inguinal Laparoscopic Repair Hemia Umbilical Surgical Procedure Code:	
	Repair Hemia Ventral Laparoscopic	
۰ (ا		
	OK Cancel	

- 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

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

1

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

🕞 Request for Book					? 💌
Nama: CSTSNWOE	PROOF RECOULED		MRN: 700008714	DOB: 08-Dec-1997	
Name. Coronwor	ARBOOK, REGISCHED		Age: 20 Years	Sex: Female	
CSTSNWORKBOOK, REG	Scheduling Criteria Summary General Details Orders	Guidelines Notification Conversation Summ	naries Eligibility Booking Notes		
⊪-⇔ Surgery	Appointment Date	12-Dec-2017	A 11Ja	n-2018	
	Request in:	1 Days	+ From: 12-De	ac-2017	× v
	Mon Tue	Wed	Thu Fri	Sat	Sun
	Appointment Time				
	Time range:	0800	1800		
	Time restrictions:	AM Only			· · · · · · · · · · · · · · · · · · ·
	Request List Arepointment Reviews Cancellation Last Future Requests Rechedule Requests Trape List Watst Watst MI BD Initia Queue MI CT P III MI CT P 2 MI CT P 3		Selected request lats: SN - LGH Surgery Wattst		
<u>در س</u> ۲	MICT P4 MIEC Intel Queue MIEC P1 MIEC P2 MIEC P3 MIEC P4 MIR Intel Queue MIR Intel Queue MIR Intel Queue MIR Intel Queue		Set Default		OK Cancel

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

3

• Request for Book Window Closes

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

					IRN:		DOB:				
ame.					ge:		Sex:				
equest List	Action	Primary Procedure	Surgeon Specialty	Primary Surgeon	Patient Name	Surgery Encounter	Location	MRN	BC PHN	Birth Date	1
la la constante de la constante	Book	Vital Signs		Plisvca, Rocco, MD	CST-TTT, TOBIAS	700000013472	LGH Main OR	700007371	9876541221	13-JAN-1944	
nquiy:	Book	Tonsilectomy and Adenoidectomy		CERNER, CERNER	CSTPRODARCH, SUNQUESTE		LGH Main OR	700001399	9878356004	11-JUL-1976	
Surgery Case Request by Queue 👻	Book	Bronchoscopy Flexible	General	Aslani, Nava	CSTPRODBCDA, STAB		LGH Main OR	700005273	9876759701	01-JAN-1960	
	Book	Appendectomy Laparoscopy	General	Dave, Mala	CSTPRODBCSN, JESSICA	700000005676	LGH Main OR	700003977	9876875006	08-JUN-1980	£.
Aquest List Queues:	Book	Tonsilectomy and Adenoidectomy	Orthopedic	Baggoo, Alan Kieth	CSTPRODBCSN, MARY	700000004681	LGH Main OR	700003117	9878043792	01-APR-1972	Ĺ
SN - LGH Surgery Waitlist 👻	Reschedule	Fusion Foot	Orthopedic	Preto, Antonio F.	CSTSNCOLA, STCOCA	700000005303	LGH Main OR	700003764	9876957913	25-MAY-2014	ŝ
	Book	Tonsilectomy	General	Queh, Peter	CSTSNDEMO, STTESTREPORT	700000007647	LGH Main OR	700005095	9876783387	01-JUL-2017	
zcauoritype.	Reschedule	Tonsillectomy and Adenoidectomy	Orthopedic	Baggoo, Alan Kieth	CSTSNGIRL, STFLOWER TULIPS	700000001839	LGH Main OR	700001285	9878386583	18-JAN-2014	
Jurgery +	Book	Tonsilectomy	Orthopedic	Baggoo, Alan Kieth	CSTSNHORTONS, STTIM	700000007014	LGH Main OR	700000758	9878396237	14-OCT-1998	1
20 m	Book	Tonsilectomy	General	Lewis, Richard Huw	CSTSNID, STSCHEDEVENT	700000007848	LGH Main OR	700005251	9876779695	01-JUL-1993	
cation:	Book	Transanal Assisted Low Anterior Resection Laparascopic	General	Aslani, Nava	CSTSNJIMPY, STWAZZA		LGH Main OR	700001678	9878259201	06-JAN-1980	
GH Main OR 🗸 🗸	Book	Tonsilectomy	General	Chang, George	CSTSNLILY, STTESTTWO	700000010275	LGH Main OR	700006517	9876706504	10-AUG-194	ŧ
	Book	Appendectomy Laparoscopy Pediatric	General	Queh, Peter	CSTSNMOON, STMISTER	700000005559	LGH Main OR	700003864	9876906623	03-JUN-2016	j.
	Reschedule	Open Reduction Internal Fixation Foot	General	Queh, Peter	CSTSNMOON, STMR	700000005509	LGH Main OR	700003876	9876900812	01-JUN-2017	ł
	Reschedule	Tonsilectomy	General	Plisvow, Tyler, MD	CSTSNMUG, STCOFFEE	700000010323	LGH Main OR	700001003	9878393801	01-NOV-1991	3
	Book	Repair Achilles Tendon	General	Plisvow, Tyler, MD	CSTSNPARKER, STPETER SPIDEY		LGH Main OR	700000817	9878395661	21-OCT-1990	j,
	Reschedule	Colonoscopy Biopsy	General	Chang, George	CSTSNPEPPER, STRED	700000004508	LGH Main OR	700000977	9878393983	30-NOV-1997	j
	Reschedule	Adenoidectomy	General	Queh, Peter	CSTSNPRACTICE, STTHREE	700000005368	LGH Main OR	700003825	9876910616	07-MAY-198	ŝ
	Reschedule	Tonsilectomy	General	Chang, George	CSTSNREPORT, STPANDB	700000007913	LGH Main OR	700005288	9876758448	01-JUL-1993	
	Book	Repair Hemia Inguinal	Orthopedic	McConkey, Mark Owen	CSTSNROSE, STTESTTWO	700000009654	LGH Main OR	700006310	9876715051	07-JUL-1992	
	Book	Manipulation Knee	Orthopedic	McConkey, Mark Owen	CSTSNROSE, STTESTTWO	700000009654	LGH Main OR	700006310	9876715051	07-JUL-1993	
	Book	Tonsilectomy	General	Chang, George	CSTSNSPR, SCENARIOSIX	700000008286	LGH Main OR	700005498	9876752271	01-JUL-2017	
	Book	Tonsilectomy	General	Chang, George	CSTSNSPR, SCENARIOTHREE	700000008251	LGH Main OR	700005495	9876752304	01-JUL-2017	
	Book	Tonsilectomy	Orthopedic	Zarkadas, Peter Constantine	CSTSNSPR, STTWO	700000009467	LGH Main OR	700006212	9876721023	01-AUG-201	ş
	Reschedule	Tonsilectomy	General	Chang, George	CSTSNSPRTEST, SCENARIOTWO	700000008165	LGH Main OR	700005297	9876758201	01-JUL-2017	ſ
	Book	Open Reduction Internal Fixation Ankle	General	Queh, Peter	CSTSNSTRANGE, STSTEVEN K	700000012514	LGH Main OR	700006557	9876704865	18-APR-197	ŝ
	Reschedule	Tonsilectomy	Respirology	Mainra, Raiesh Rai	CSTSNSUN, STMISTER	700000005813	LGH Main OR	700004027	9876868777	01-JUN-201	ĩ
	Book	Appendectomy	General	Chang, George	CSTSNTEST, STWARDA	700000010578	LGH Main OR	700006697	9876595248	11-SEP-1970	j.
	Book	Fusion Spine Anterior Cervical		TestDEMO, Neurosurgeon-Physician 1, MD	CSTSNWALLACE, TEST		LGH Main OR	700007462	9876527016	08-AUG-198	3
	Book	Repair Biceps	General	Plisvow, Tyler, MD	CSTSNWINDU, STMACE	700000012102	LGH Main OR	700007525	9876514722	08-AUG-197	2
	Book	Appendectomy	General	Plisvow, Tyler, MD	CSTSNYODA, STMASTER	700000012200	LGH Main OR	700007532	9876514636	19-MAY-194	3
	Reschedule	Repair Hemia Inguinal	General	Hunter, James McPhalen	DEMO, INTRAFOUR	700000007342	LGH Main OR	700004960	9876790121	01-JUL-1967	
	Reschedule	Tonsilectomy	General	Smith, Jenni	DEMO, VERIFICATIONONE	700000007371	LGH Main OR	700004978	9876789671	01-JUL-1996	
	Book	Tonsilectomy	Orthopedic	Baggoo, Alan Kieth	STSPR, REPORTTEST	700000007547	LGH Main OR	700005054	9876785327	01-JUL-2000	
	D 1 11		New A				1		Too and the second second		

- 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.

Tonsillectomy	_		
Tonsillectomy	Cor	mplete Request	
Tonsillectomy	Mo	dify Request	
Tonsillectomy	Mo	ve Request	
Open Reduction Internal Fixati	-		
Tonsillectomy	Car	ncel Request	
Appendectomy	Res	tore Request	
Fusion Spine Anterior Cervical			
Repair Biceps	Sch	iedule	
Repair Hemia Inguinal	Inc	uin	
Appendectomy	Inq		
Repair Hemia Inguinal	Not	tifications	

- 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



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).

4 2017 b	Books Appointment			Work in progress:			
I December →	*Annointment type			New A			Schedule
Su Mo Tu We Th Fr Sa	Surgery			MOVE P			Confirm
26 27 28 29 30 1 2	*Appointment location:			Next			Becur
3 4 5 6 7 8 9				Clear			
17 18 19 20 21 22 23	*Person name:			Allergies			Suggest
24 25 26 27 28 29 30							Request
31 1 2 3 4 5 6	.n. n		-				Insert
		1	11-Dec-2017 - LGH Main OR				
LGHOR CAP	LGHOR NEW LGHOR GRV	LGHOR GRS	IGHOR GAR IG	HOR KC LGHOR WHS	IGHOR SEY	LGHOR AddOn 01	LGHOB AddOn 02
14.15 SN Plattos - Van Laskn 14.30 15.00 15.15 15.30 15.45 15.46 16.15 16.45 16.45 16.45 17.00 N - EMERGENCY ONLY 17.30 N - EMERGENCY ONLY 17.35 17.45	SN Neurosurgery - Jancki, SN Urokogy - Corts, Paul SN - EMERGENCY ONLY SN - EMERGENCY ONLY	SN Othopedic - Sidy, Ad. SN Gy Sr CSTSIWORKBOOK. Suppy LGH Man OR Cortined 116/06/32 Minutes 15/15-16.42 SN - EMERGENCY ONLY.	necology and Obste SN General IMERGENCY ONLY SN General SN General SN - EMER	I-Sindh, Jern LI-ER IGENCYONLY SN-EMERGENCYONLY	SN Plattica - Chew, Roden	SN - EMERGENCY ONLY	SN - EMERGENCY ONLY

- 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

e: CSTSNWOR	READON REGISCHE	ח	MRN: 700008714	DOB: 08-Dec-1997
	aboon, nedoone.		Age: 20 Years	Sex: Female
STSNWORKBOOK, REG	General Summary Details	Orders Guidelines Notification Conversation Summaries Itiner	raries Locks Booking Notes	
Surgery	*Cancel reason:			
	SN - (P) Weather			
	Comments:			
	Person Name	Enc Type		
	COTONNON RECOON	Linegency		
	-			View Modify Cancel E
4				



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

DATASHEET

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.

4 2017 >	Books Appointment	1				Work in progress:				
← December →	*Appointment type				A Mouse h					Schedule
Su Mo Tu We Th Fr Sa	Surgery									Confirm
26 27 28 29 30 1 2	*Appointment location:				Next					Recur
10 11 12 13 14 15 16				- 11	Clear					Sunnest
17 18 19 20 21 22 23	*Person name:				Allergies					002300
24 25 26 27 28 29 30										Request
31 1 2 3 4 3 6										Insert
					Main OR					-
LGHOR CAP	LGHOR NEW	LGHOR GRV	LGHOR GRS	LGHOR GAR	LGHOR KC	LGHOR WHS	LGHOR SEY	LGHOR AddOn 01	LGHOR	AddOn 02 ^
14:00 14:15 SN Plastics - Van Leakin, 14:30 14:45	SN Neurosurgery - Janicki	SN Urology - Crofts, Paul	SN Orthopedic - Sidky, Ad	SN Gynecology and Obste	SN General - Smith, Jenni	SN Orthopedic - ER	SN Plastics - Chew, Roderi	SN - EMERGENCY ONLY	SN - EMERGI	ENCYONLY
15:00 15:15 15:30 15:45 16:00			CSTSNWORKBOOK Surgery LGH Main OR Confirmed	SN - EMERGENCY ONLY	SN General - ER					
16:15 16:30 16:45 17:00 SN - EMERGENCY ONLY 17:30 17:45	SN - EMERGENCY ONLY	SN - EMERGENCY ONLY	1 Hour(s) 27 Minutes 15:15-16:42 SN - EMERGENCY ONLY		SN - EMERGENCY ONLY	SN - EMERGENCY ONLY	SN - EMERGENCY ONLY			E

- 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



) Cancel							? <mark>×</mark>
				MRN: 70	0008714	DOB: 08-Dec-199	
ame. Coronwon	RBOOK, REGISCILE			Age: 20	Years	Sex: Female	
CSTSNWORKBOOK, REG	General Summary Details *Cancel reason: SN- (P) Clinical Findings or Reasons Comments: Comments:	Orders Guidelines	Notification	Conversation Summaries	Itineraries Locks	Booking Notes	Cancel Enc
< <u>III</u> >							
						ОК	Cancel

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

🔞 Request for Reschedule						-? 💌				
Name: CSTSNWOD	VROOK BECSCHED	MBN: 700008	8714	DOB: 08-Dec-195						
Name. Coronwork	RBOOK, REGISCHED		Age: 20 Yea	13	Sex: Female					
CSTSNWORKBOOK, REGSCHE	Scheduling Criteria Summary Action Details Genera	I Guidelines Notification Conversation Summ	naries Eligibility Booking Notes							
i∂-� Surgery	Appointment Date	13-Dec-2017		12-Jan-2018						
	Request in:	1 🛋	ys 👻 From:	12-Dec-2017		<u>м</u> т				
	Mon Tue	Wed	Thu	Fri	Sat	Sun				
	Appointment Time									
	Time range:	0800		1800						
	Time restrictions:	AM Only				·				
	Pequeit List A inquest las: Selected request list:									
	M RF hind Douve M US hind Douve M US P1 M US P2 M US P2 M US P3 M NS hind Douve SN - 164 Pan Chro Wattet SN - 164 Pan Chro Scientify SN - 164 Pan Chro Scientify SN - 164 Pan Annu America SN - 164 Pan Annu A		dig ga Sat Dafasit							
< <u> </u>	V Snow all									
						OK Cancel				

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

Request for Reschedule												? 💌
						MRN: 7000087		DOB: 08-Dec-1997				
Name. Coronwon	KBOOK, REGSCHE							Age: 20 Years		Sex: Female		
CSTSNWORKBOOK, REGSCHE	Scheduling Criteria Summary	Action Details	General	Guidelines	Notification	Conversation Summa	es Eligibility	Booking Notes				
⊵ Surgery	Appointment Date				13-Dec	-2017			🛋 💌 12-Jan-2018	1		
	Request in:				1	Days		v From:	12-Dec-201	7		× v
	Mon		Tue		Wed	1	Thu		Fri	Sat	Sun	
	Appointment Time				0000				1000			
	Ime range: To the range:				AM Cr	A.			1000			
	Time restrictions:				AM OF	iy						· ·
	All request List							Selected request lis	ts:			
۲	Apporting Reviews Concellation List Future Requests Reschedd Requests Media Mic The Request Mic The Regulat Mic The Regulat Mic The Regulat Mic The Regulat Mic The Regulat Mic The Regulation Mic The Regu					× E	📫 付 Set Default	SN - LGH Surgery	Wallat			
· · · · · · · · · · · · · · · · · · ·											ок	Cancel
										l.		

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



Cancel a patient's request from the Request List Inquiry

1. Click Request List Inquiry kithin the toolbar

4 🏡 🔣 🤨 🖞 🖄 🗇 🐘 🖓 🏠	🌣 🍬 🛱 🗃 🛃	🛚 🙍 🟮 🕫 💐 🍕 😹 🖾 📝 🖉 🤘	2							
				h	IRN:		DOB:			
ame:				,	.ge:		Sex:			
equest List	Action	Primary Procedure	Surgeon Specialty	Primary Surgeon	Patient Name	Surgery Encounter	Location	MRN	BC PHN	Birth Date
	Book	Appendectomy Laparoscopy	General	Dave, Mala	CSTPRODBCSN, JESSICA	700000005676	LGH Main OR	700003977	9876875006	08-JUN-198
quiry:	Book	Tonsilectomy and Adenoidectomy	Orthopedic	Baggoo, Alan Kieth	CSTPRODBCSN, MARY	700000004681	LGH Main OR	700003117	9878043792	01-APR-19
Surgery Case Request by Queue	 Reschedule 	Fusion Foot	Orthopedic	Preto, Antonio F.	CSTSNCOLA, STCOCA	700000005303	LGH Main OR	700003764	9876957913	25-MAY-20
	Book	Tonsilectomy	General	Queh, Peter	CSTSNDEMO, STTESTREPORT	700000007647	LGH Main OR	700005095	9876783387	01-JUL-20
equest List Queues:	Reschedule	Tonsillectomy and Adenoidectomy	Orthopedic	Baggoo, Alan Kieth	CSTSNGIRL, STFLOWER TULIPS	700000001839	LGH Main OR	700001285	9878386583	18-JAN-20
6N - LGH Surgery Waitlist	 Book 	Tonsilectomy	Orthopedic	Baggoo, Alan Kieth	CSTSNHORTONS, STTIM	700000007014	LGH Main OR	700000758	9878396237	14-0CT-19
	Book	Tonsilectomy	General	Lewis, Richard Huw	CSTSNID, STSCHEDEVENT	700000007848	LGH Main OR	700005251	9876779695	01-JUL-19
ocation type:	Book	Transanal Assisted Low Anterior Resection Laparascopic	General	Aslani, Nava	CSTSNJIMPY, STWAZZA		LGH Main OR	700001678	9878259201	06-JAN-19
Surgery	 Book 	Tonsilectomy	General	Chang, George	CSTSNLILY, STTESTTWO	700000010275	LGH Main OR	700006517	9876706504	10-AUG-1
	Book	Appendectomy Laparoscopy Pediatric	General	Queh, Peter	CSTSNMOON, STMISTER	700000005559	LGH Main OR	700003864	9876906623	03-JUN-2
ocation:	Reschedule	Open Reduction Internal Fixation Foot	General	Queh, Peter	CSTSNMOON, STMR	700000005509	LGH Main OR	700003876	9876900812	01-JUN-2
LGH Main OR	 Reschedule 	Tonsilectomy	General	Plisvow, Tyler, MD	CSTSNMUG, STCOFFEE	700000010323	LGH Main OR	700001003	9878393801	01-NOV-1
	Book	Repair Achilles Tendon	General	Plisvow, Tyler, MD	CSTSNPARKER, STPETER SPIDEY		LGH Main OR	700000817	9878395661	21-0CT-1
	Reschedule	Colonoscopy Biopsy	General	Chang, George	CSTSNPEPPER, STRED	700000004508	LGH Main OR	700000977	9878393983	30-NOV-1
	Reschedule	Adenoidectomy	General	Queh, Peter	CSTSNPRACTICE, STTHREE	700000005368	LGH Main OR	700003825	9876910616	07-MAY-1
	Reschedule	Tonsilectomy	General	Chang, George	CSTSNREPORT, STPANDB	700000007913	LGH Main OR	700005288	9876758448	01-JUL-19
	Book	Repair Hemia Inguinal	Orthopedic	McConkey, Mark Owen	CSTSNROSE, STTESTTWO	700000009654	LGH Main OR	700006310	9876715051	07-JUL-19
	Book	Manipulation Knee	Orthopedic	McConkey, Mark Owen	CSTSNROSE, STTESTTWO	700000009654	LGH Main OR	700006310	9876715051	07-JUL-19
	Book	Tonsilectomy	General	Chang, George	CSTSNSPR, SCENARIOSIX	700000008286	LGH Main OR	700005498	9876752271	01-JUL-20
	Book	Tonsilectomy	General	Chang, George	CSTSNSPR, SCENARIOTHREE	700000008251	LGH Main OR	700005495	9876752304	01-JUL-20
	Book	Tonsilectomy	Orthopedic	Zarkadas, Peter Constantine	CSTSNSPR, STTWO	700000009467	LGH Main OR	700006212	9876721023	01-AUG-2
	Reschedule	Tonsilectomy	General	Chang, George	CSTSNSPRTEST, SCENARIOTWO	700000008165	LGH Main OR	700005297	9876758201	01-JUL-20
	Book	Open Reduction Internal Fixation Ankle	General	Queh, Peter	CSTSNSTRANGE, STSTEVEN K	700000012514	LGH Main OR	700006557	9876704865	18-APR-19
	Reschedule	Tonsilectomy	Respirology	Mainra, Rajesh Rai	CSTSNSUN, STMISTER	700000005813	LGH Main OR	700004027	9876868777	01-JUN-20
	Book	Appendectomy	General	Chang, George	CSTSNTEST, STWARDA	700000010578	LGH Main OR	700006697	9876595248	11-SEP-19
	Book	Fusion Spine Anterior Cervical		TestDEMO, Neurosurgeon-Physician 1, MI	CSTSNWALLACE, TEST		LGH Main OR	700007462	9876527016	08-AUG-1
	Book	Repair Biceps	General	Plisvcw, Tyler, MD	CSTSNWINDU, STMACE	700000012102	LGH Main OR	700007525	9876514722	08-AUG-1
	Reschedule	Open Reduction Internal Fixation Hip Dynamic Hip Screw		Plisvex, Stuart, MD	CSTSNWORKBOOK, REGSCHED	700000016539	LGH Main OR	700008714	9876414662	08-DEC-19
	Book	Appendectomy	General	Plisvow, Tyler, MD	CSTSNYODA, STMASTER	700000012200	LGH Main OR	700007532	9876514636	19-MAY-19
	Reschedule	Repair Hemia Inguinal	General	Hunter, James McPhalen	DEMO, INTRAFOUR	700000007342	LGH Main OR	700004960	9876790121	01-JUL-19
	Reschedule	Tonsilectomy	General	Smith, Jenni	DEMO, VERIFICATIONONE	700000007371	LGH Main OR	700004978	9876789671	01-JUL-19
	Book	Tonsilectomy	Orthopedic	Baggoo, Alan Kieth	STSPR, REPORTTEST	700000007547	LGH Main OR	700005054	9876785327	01-JUL-20
	Reschedule	Tonsilectomy	General	Queh, Peter	TEST, VERIFYONE	700000007387	LGH Main OR	700004985	9876789585	01-JUL-20
	Book	Hemiarthroplasty Shoulder	General	Hunter James McPhalen	ZHANG-LEARN HAO	700000013309	LGH Main OR	700005472	9876753241	25-MAY-20

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.



Action Column Displays as "Book"

Paula Assessment Constant Discourt Tyles MD COSTANTS AGOVINGTON	REGSCHED	CSTSNWORKBOOK, REG	Plisvcw, Tyler, MD	General	Repair Hemia Inguinal G	Book R
Book Appendectomy deneral Pilsvcw, Tyler, MD CSTSINTODA, STMAST	STER	CSTSNYODA, STMASTEF	Plisvow, Tyler, MD	General	Appendectomy G	Book Ap

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

Cancel				8
ame: CSTSNW/OE	RROOK PECS		MRN: 700008714	DOB: 08-Dec-1997
ame. Coronwor	KBOOK, HEGS		Age: 20 Years	Sex: Female
CSTSNWORKBOOK, REG	General Summary D	etails Orders Guidelines Notification Conversation	n Summaries Itineraries Locks Booking Notes	
👜 🖘 Surgery	*Cancel reason:			
	SN - (R) Removed from WL	by Surgeon		
	Comments:			
	Person Name	Enc Type		
	CSTSNWORKBOOK, RE	GSCHED		
				View Modify Cancel Enc
	L			
				OK Cancel

- 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	700000012102
Reschedule	Open Reduction Internal Fixation Hip Dynamic Hip Screw		Plisvex, Stuart, MD	CSTSNWORKBOOK, REGSCHED	700000016539
Book	Appendectomy	General	Plisvcw, Tyler, MD	CSTSNYODA, STMASTER	700000012200

- 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



🔁 Modify						? ×
			MRN: 70	00008714	DOB: 08-Dec-1997	
Name: CSTSNWOR	KBOOK, REGSCHED		Age: 20	Years	Sex: Female	
CSTSNWORKBOOK, REG	General Summary Details Order Modify reason: SN - (P) Anesthesia Unavailable SN - (P) Bumped by Emerg SN - (P) Bumped by Emerg SN - (P) Case Overun SN - (P) Case Overun SN - (P) Case Overun SN - (P) Case Overun SN - (P) Case Overun SN - (P) Disaster Code SN - (P) Disaster Code SN - (P) Disaster Code SN - (P) Disaster Code SN - (P) Disaster Code SN - (P) Disaster Code SN - (P) Disaster Code SN - (P) Disaster Code SN - (P) Astrone Unavailable SN - (P) Disaster Code or Drank SN - (P) Patient Are or Drank SN - (P) Patient Concelled SN - (P) Patient Consciled SN - (P) Patient Unavailable SN - (P) Patient Unavailable SN - (P) Patient Unavailable SN - (P) Patient Unavailable SN - (P) Patient Unavailable SN - (P) Patient Unavailable SN - (P) Patient Unavailable SN - (P) Patient Unavailable SN - (P) Patient Unavailable SN - (P) Patient Unavailable SN - (P) Patient SN - (P) Weather SN - (R) Administrative Error SN - (R) Administrative Error SN - (R) Administrative Error SN - (R) Patient Deceased SN - (R) Removed from WL by Patient SN - (R) Removed from WL	s Guidelines Notification	Conversation Summaries	Itineraries Locks	Booking Notes	
					ОК	Cancel

- 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

Cancel Request			? 💌
Name OSTENIMODEROOK D	ECOCUED	MRN: 700008714	DOB: 08-Dec-1997
Name. CSTSNWORKBOOK, R	EGSCHED	Age: 20 Years	Sex: Female
CSTSNWORKBOOK, REGS General			
			*
			v
			OK Cancel

- 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

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

DATASHEET

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

Login to PowerChart to begin the activity.

Kowers hart Urganizer for Lestsa, Scheduler-Perioperative/	
Task Edit View Patient Chart Links CaseActions Provider List Help	
Perioperative Tracking 🖕 Patient List 🔛 Case Selection 🎬 Time-Critical Procedures 🎆 LearningLIVE 📄 😨 CareConnect 🕲 PHSA PACS 🕲 VCH and PHC PACS 🕲 MUSE 🕲 FormFast WFI 📄	
📲 Exit 🎬 AdHoc 🍒 PM Conversation 🔹 🛧 Add 👻 🗐 Document 🍙 Discern Reporting Portal 👼 Report Builder 👼 Scheduling Appointment Book. 🔛 Report Manager 🎆 Staff Assign 🔤	
© Patient Health Education Materials @ Policies and Guidelines @ UpToDate	
	✓ @ Recent + Name + Q
Perioperative Tracking	🖽 Full screen 📾 Print 🕹 0 minutes ago
SGH Pref Card SGH Freemenory List SGH PreOn SGH Intrann SGH OR View SGH Case Communication IGH Endolmore	malete I GH Endo PreQa
LGH Case Communication LGH PreOp LGH Intraop LGH Emergency List LGH PAC LGH PreOp LGH Intraop LGH Intraop	R IntraOp LGH OB View LGH ASC PreOp
Filter: LGH PAC Tomorrow 🔹 💿 🔞 🝰 🜩 関 Total Cases: 1 Patient: CSTSNWORKBOOK, REG -	
Status PAC Time PAC Location Patient Age/Sex Alerts Allergy Anesthesiologist Old Chart Status Pror	c. Date Procedure Surgeon PAC Visit Type
LGH OCC Rm 8 (Exam) (1 case)	
13-Dec-2017 CSTSNWORKBOOK, 20 years / 09:00:00 REOSCHED Female	Plisvcw, Tyler, MD PreAnesthesia C Anesthesia Visit
۲ <u>ا</u>	4

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



Reporting Portal				
Reporting Portal			Welcome: TestSX	, Scheduler-Perioperative1 Settings Help
Reporting Portal			3 Search for Report Title	
Filters	All Reports (4) My Favorites (0) Report Name	Categories	♦ Source	1 <mark>⊙</mark> ♦ Favorite ♦
► Source	IOL - Scheduled Cases with Specialty Le	ns Perioperative Clerk	Public	t.
 Categories 	Patient Route Slip	Perioperative Clerk	Public	\$
Pagant Panarta	Scheduling Event ID Report	Perioperative Clerk	Public	● ☆
Scheduling Event ID Report	Description:	Suggested Report User:	Reporting Application: 5	Run Report
Patient Route Slip		Suggested Report Frequency:	Alternate Name: BC_ALL_SURG_SCH_EVENTID_LYT:DBA	Run Report in Background
		Support Reference Number: c88bfe3a-0e9a-43a0-bf64-956b3336b033		View Previous Run
	Waitlist Report for Scheduled Cases	Perioperative Clerk	Public	4
-				

- 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.

Access the Schedule Event ID Report

- 1. Click the Schedule Event ID Report to highlight the row
- 2. Click Run Report

2

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

Discern Prompt: BC_ALL_SURG_SCH_EV	/ENTID_LYT:DBA					
Output to File/Printer/MINE	MINE	- 8				
*Excel Friendly?	Exportable(CSV)	Printable(PDF)				
*Select Site	Lions Gate Hospital	•				
Facility	Any () EGH Evergreen House LGH HOpe Centre CLGH Lions Gate Hospit	l ce				
OR Location	Any () LGH Endoscopy LGH MTR V LGH Men OR LGH Ovt of OR LGH Private Chris	F				
Search for Patient (Blank for All Patients)		Se	rch			
		Re	love			
				Execute Cancel		



- 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

BC PHN:	VIP	Deceased	Alerts	BC PHN	MRN	Name	DOB	Age	Gender	Address	Addre
MBN:	000		Process Alert	9876429433 9876420562 9876420143	700008243 700008518 700008545	CSTSNWORKBOOK, REVIEW CSTSNWORKBOOK, INTRAOP CSTSNWORKBOOK, ENDOSCOPY	30-Oct-1963 09-Aug-1963 30-Nov-1987	54 Years 54 Years 30 Years	Male Male Female	590 Ash Street 590 West 8th Ave 12345 Street	cor 8t
.ast Name:	2			9876418312	700008576	CSTSNWORKBOOK, POSTOP	04-Dec-1990	27 Years	Female	590 West Brook St	
cstsnworkbook			Process Alert	9876418305	700008577	CSTSNWURKBUUK, PREUP	04-Dec-2000	17 Years	Male	590 West Broadway	
First Name:	22			3070414002	700000714	CSTORWORKBOOK, NEUSCIED	00-0-60-1337	20 16 815	remaie	Stort Avenue Cor A Silee	
DOB:	-										
ки, кок, кини											
Gender:	-										
Postal/Zip Code:											
Any Phone Number:											
Encounter #:	-										
√isit #:	-										
Historical MRN:											
Search Reset											
	1					III		2			

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

Output to File/Printer/MINE	MINE • D
*Excel Friendly?	Exportable(CSV) O Printable(PDF)
*Select Site	Lions Gate Hospital
*Facility	Image: Control Image: Control Image: Contro Image: Contro<
*OR Location	LOH Francesop LOH Francesop U CoH MTR U CoH Man OR LIGH How of OR LIGH How of OR
Search for Patern (Blank (or Al Paternt)	CSTSNVORKEDOK, REGSCHED Remove
= n	Execute Cancel

- 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	760000000596	LGH Main OR	Elective	Surgery

* * End of Report * *

9. Click is to close the report

3

Accessing Waitlist Report for Scheduled Cases

Reporting Portal				
😂 Cerner				
Reporting Portal			Q Search for Report	Title
Filters	All Reports (4) My Favorites (0)			1 0
	Report Name	 Categories 	♦ Source	♦ Favorite ♦
 Source 	IOL - Scheduled Cases with Specialty Lens	Perioperative Clerk	Public	Å
Categories	Patient Route Slip	Perioperative Clerk	Public	$\stackrel{\sim}{\sim}$
	Scheduling Event ID Report	Perioperative Clerk	Public	Ŕ
	Waitlist Report for Scheduled Cases	Perioperative Clerk	Public	\$
	Description:	Suggested Report User:	Reporting Application: CCL	Run Report
		Suggested Report Frequency:	Alternate Name: BC_ALL_SUR_WAITLIST_LYT:DBA	Run Report in Background
		Support Reference Number: 68a153e3-9033-4c9e-9ce4-e63bbf37e57a		VIEW Previous RUN

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



Discern Prompt: BC_ALL_SUR_WA	AITLIST_LYT:DBA	
Output to File/Printer/MINE	MINE	- 🖻
*Excel Friendly?		0.011.01.005
	U Exportable(CSV)	Printable(PDF)
*Include Patient Identification	• Yes O No	
*Select Site	Disc Catellinead	
Scher She	Lions Liate Hospital	•
Area	Any ()	<u>_</u>
	LGH MTR	-
	LGH Main OR LGH Out of OR	•
	•	•
Surgeon Specialty	Any ()	<u>^</u>
	Cardiac Surgery	
	Cardiology	-
	< [III	+
Surgeon	Any ()	<u>^</u>
	Abedi, Nasim	
	Aslani, Nava Rangoo, Alan Kiath	-
	< III	•
Cancer	🔽 Any ()	
	Suspected Not Suspected	
	Proven	
Wait Time Calculation	Adjusted	•
Wait Time in Weeks FROM	0	
Wait Time in Weeks TO (Blank for All)		
Sort By	Wait Time in Weeks (descen	ding) 👻
Poture to promote on close of output		

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 R	leport for Schedu	led Cases 🗙												
🖬 🎯 n. A 🗃 🖓 🖬		2 🔍 🔍 150% 🔹 🐗												
Submitted By: Test Submitted On: 12-D ** CONFIDENTI.	SX, Scheduler DEC-2017 17:3 AL **	r-Perioperative2 58	Excluded Pro	REGIO Suri cedure(s) : NOM	NAL SUR Site geon Specialty: IE; Cancer Flag;	GICAL e: ; OR Locatio All Specialtie : All; Wait Tim	WAIT on: None s; Surgeo e Calculat	LIST F n: All Surg tion: Adjus	REPO Jeons Sted; Wai	RT it Time In 1	Weeks: ALL			
Facility : LGH Lie Location : LGI Specialty : Surgeon	ons Gate Hos H Main OR Admitting - H : Plisvcw, Ty	pital HTH Hilltop Ier, 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	х	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	х	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	х	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	х	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	х	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	х	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

-	

DATASHEET	

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.



- Double Click Surgery Waitlist 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. Click Add Encounter

🗗 Organization
Please select the facility where you want to view person aliases.
Facility Name Facility Alias
LGH Lions Gate
LGH Lions Gate Hospital
Facility:
LGH Lions Gate Hospital
OK Cancel

- 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.



Conversation
😴 Add/Modify Person
🚘 Bed Transfer
🗙 Cancel Discharge
🔁 Cancel Encounter
XCancel Pending Transfer
🚮 Discharge Encounter
🚔 Facility Transfer
🤣 Leave of Absence
📲 Modify Discharge
👸 Modify Discharged Surgical P
💏 Pending Facility Transfer

- 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 SurgeryWaitList
- 5. Click OK
- 6. Discharge Encounter window displays

Discharge Disposition: Discharge Date: Discharge Time: Discharge Username:	Discharge Information -		
No Evenage Service - 11Dec.2017 15:28 - Testage Service - Testage Service	Discharge Disposition:	Discharge Date: Discharge Time: Discharge Username:	
	No Further Service	I1-Dec-2017 If 28 Inc. Inc.	

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



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.

girvec stari Assign						
ssignment ⊻iew <u>H</u> elp						
Denim Dist	ii w 🖪 Y 🚽	a 200% - 5 Minutar - Sol	64 EN			
Preview, Print,	〒 尚 🖻 木 🖻					
						11-Dec-2017
*				2 110 20 30 40 50 60 70 80 90 10 11 12 110 20 30 40 50 60 70	0.80.90.10.11	
- Emplo	yee	Roles				
Teams						
Individuals						
nt - 🖸 Ahma	di, Hazhir	Anesthesiologist				
- 🞗 Chatte	erson, Kelly Schalin	Anesthesiologist				
- 🞗 Fingla	nd, Robert Murray	Anesthesiologist				
- 🞗 Hewg	ill, Randolph Thomas	Anesthesiologist				
- 😥 Hudso	on, Jacqueline Taryn	Anesthesiologist				
- 🕏 Klar, N	farta Joanna	Anesthesiologist				
- 9 Kuca	Tomas	Anesthesiologist	1			
- 9 Lipow	ska. Magdalena Maria	a Anesthesiologist				
- 9 McAk	ine John Claude	Anesthesiologist	1			
- Ø McCa	der, Bryon Douglas	Anesthesinlogist				
- C McDia	amid Adam Pone	Anesthesiologist	1			
- 6 Merrie	on Flate	Anertherinkrist				
- 6 Panla	I Richard James	Anetherinlovit	1			
B Dack	Macous	Anethoridogic				
	AD Kalaiak MD	Anotherinkein				
E Dive	, AP, Kaleigh, MU	Anesthesislesist				
Pisvo	I, BIDOKS, MU	Anesthesisle sit				
F X FISVO	T, Caliton, MD	Aneonesologist				
PISVO	C, LOOY, MU	Anesmesologist				
F V Hajan	, Tasmin Abdul	Anesthesiologist				
- 12 Hipley	, Leresa Marion	Anesthesiologist				
- X Hoos,	Martin Hobert	Anesthesiologist				
- 92 Senit,	Hiley Unristopher	Anesthesologist				
- 9 Shin, I	Enc Dong	Anesthesiologist				
- 9 Thoba	anı, Shahk Umedalı	Anesthesiologist				
- 😥 Veal,	John William	Anesthesiologist				
⊢¶ Viana	, Andrea Paula	Anesthesiologist				
			I I			
			I I			
			I I			
			I I			
			I I			
				1		
			الغريبي	1		
	_					
	ed By Te	an Confict			Cr.	officts: None 11-Dec-2017

				2017			•
	•		De	ecemt	ber		•
	Su	Мо	Tu	We	Th	Fr	Sa
	26	27	28	29	30	1	2
	3	4	5	6	7	8	9
	10	11	12	13	14	15	16
	17	18	19	20	21	22	23
	24	25	26	27	28	29	30
	31	1	2	3	4	5	6
Conflicts: N	one	13-Dec-2017			÷	•	

- 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

Location Selection
Area Selection
Existing Recent
 Here and the formula of the formula o
EGH Laboratory CGH Lions Gate CGH Department of Perioperative Services 2 CGH Main OR CGH MAIN CGH CH CGH CH
EGH Med Imaging

- 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

	12: 1:0 2:0 3:0 4:0 5:0 6:0 7:0 8:0 9:0 10: 11: 12: 1:0 2:0 3:0 4:0 5:0 6:0 7:0 8:0 9:0 10: 11:
Plisver, Carlton, MD	

- 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



🔄 Locations and Roles Selection	_										
LGHOR CAT1	🔺 🗌 Anesthe	esia Assistant 📃 🔒									
LGHOR CAT2	🗌 🗌 Anesthe	esia Fellow 👘									
LGHOR GAR		esia Besident									
LGHOR GRS	🔜 🖌 🖌 🖌 🖌	esiologist 2 +									
LGHOR GRV	🗌 🔁 Diemedi	ical Technisian									
LGHOR KC	🔄 🗌 Circulati	ing Nurse									
LGHOR LON	🗧 🗌 Circulati	ing Nurse -Perioperative Stuc									
LGHOR NEW	🗌 🗌 Dental A	Assistant									
✓ LGHOR SEY	🔄 🗌 Endosco	opy Nurse									
LGHOR WHS	🔫 🔲 Gastroe	enterologist 📑									
Assignment											
Location Role											
0 LGHOR SEY Anesthesiologist											
		4									
		OK Cancel									

- 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**



	12	2: 1	1:0	2:0	3:0	4:0	5:0	6:0	7:0	8:0	9:0	10:	11:	12:	1:0	2:0	3:0	4:0	5:0	6:0	7:0	8:0	9:0	10:	11:
Plisver, Carlton, MD		I																	ī						

- 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



	🖏 Locations and Roles Selection
	LGHOR CAT1 Anesthesia Assistant
	LGHOR CAT2 Anesthesia Fellow
	LGHOR GAR
	□ LGHOR GRS
	LGHOR GRV Biomedical Technician
	LGHOR KC
	LIGHOR LON EL CHORNEL A Structure - Chornel A substant
	CHOR SET Endoscopy Noise Gestroenterologist
	III A
	Anderson
	Location Hole
	OK Cancel
3	Click the Location < LGHOR SEY> in the window to the left
⊿.	Click Anotheoiologist, in the window to the right
4.	Click <anestnesiologist> in the window to the right</anestnesiologist>
F	
э.	
6.	Click OK
	12: 1:0 2:0 3:0 4:0 5:0 6:0 7:0 8:0 9:0 10: 11: 12: 1:0 2:0 3:0 <mark>4:0 5:0 6:0 7:0 8:0 9:0</mark> 10: 1
7.	Click the white bar between <4:00 to 9:00> to have it highlight in RED
Q	Click Delete Assignment II in the teelbar
0.	
	Allotted time is removed

	12:	1:	:0	2:0	3:0	4:0	5:0	6:0	7:0	8:0	9:0	10:	11:	12:	1:0	2:0	3:0	4:0	5:0	6:0	7:0	8:0	9:0	10:	11:	
						1	1	1	1		1	1														
Plisver, Carlton, MD																										

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

\frown
DATASHEET

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

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

2

- 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)

Appointment Attributes		-?
CSTSNWORKBOOK, REGSCHED	Details Orders Resource List Guidelines Pref Cards Appointment Eligibility	
🗄 🖘 Surgery Rapid		
	CSTSNWORKBOOK REGSCHED *Primary Surgeon:	
	Plisvex Stuart MD	
	Open Reduction Internal Fixation Hip Dynamic Hip Screw	
	Requested Start:	_
		×
	*Primary Procedure?:	=
	Yes	•
	Modifier 1(Laterality/Body Part/Approach):	
		_
	Modfier 2:	
		-
	Optional Search Existing Orders Privileges AOS Required	
	open reduction Modifier 3:	
	Occur Bady strand Don't an Dense	•
	Open Reduction Internal Exation Front Additional Procedure Detail:	
	Open Reduction Internal Fixation Forearm with Elastic IM Nail	
	Open Reduction Internal Fixation Hip Cannulated Screws	
	Open Reduction Internal Fixation Hip Dynamic Hip Screw Surgical Procedure Code:	
	Open Reduction Internal Fixation Humerus	🔻
		• 🛛 🕅
III N		-
···· F		
	ок	Cancel

- 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:

Perio	perative Tracking												
LGH	Case Communication LGH Pre	f Card LG	H Emergency Li	st LGH PAC	LGH PreOp LGH Intraop	LGH MTR IntraOp LGH OB View	LGH ASC PreOp	SGH Pref Card	SGH Emergen	cy List SGH PreO	p SGH Intraop	SGH OB View	SGH Case Co
Filter: LGH Emergency List 🚽 🔟 🔞 🥵 😼 Total Cases: 4													
	Status	Case Ord	er Ant. Start	Priority	Booking Date/Time	NPO Status	Ant. Duration	Pt. Type	Iso Alerts	Allergy	Patient		
	LGHOR AddOn 01 (1 ca	se)											
		1	08:00	E0: STAT			85	Pre-Inpatient	0	<u>in series and series </u>	CSTSNCOOPE	R, STBETTY	
	LGHOR CAT2 (1 case)												
		2	12:00	E4: < 48 hours			60	Emergency		<u> </u>	CSTSNWORKE	BOOK, REGSC	HED
	LGHOR KC (2 cases)												
		3	11:00	E4: < 48 hours			60	Emergency		<u> </u>	CSTSNBRAND	YBUCK, STME	RIADOC
•		4	12:00	E4: < 48 hours			60	Inpatient		Q	CSTSNTOOK,	STPEREGRIN	

- 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)

DATASHEET	

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



🖻 Reschedule	? 🔀
*Reason:	
	•
_Unavailable Staff	A
_Unavailable Technologist	
_Weather	
_Wrong Order	
_Wrong Patient	
SN - (P) Anesthesia Unavailable	
SN - (P) Bumped by Emerg	
SN - (P) Case Overrun	
SN - (P) Clinical Findings or Reasons	
SN - (P) Code Triage	
SN - (P) Disaster Code	
SN - (P) Equipment Unavailable	
SN - (P) ICU Bed Unavailable	
SN - (P) Job Action	
SN - (P) No Show	
SN - (P) Nurse Unavailable	
SN - (P) Patient Ate or Drank	
^{ge} SN - (P) Patient Cancelled	9
🚾 SN - (P) Patient No Consent	1 <mark>1</mark> 5
vc SN - (P) Patient Too Sick to Come In	*
οι SN - (P) Patient Unavailable	м
SN - (P) Postponed by Surgeon	= =
SN - (P) Preparation Not Complete	
^{HC} SN - (P) Surgeon Unavailable	
SN - (P) Transportation/No Ride	
SN - (P) Unit Bed Unavailable	
SN - (P) Weather	
SN - Move From Prev Day Add-On List	
SN - Reschedule from Request List	
SN - Shuffling	-

- 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

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

Ly rotar cases 1	
Start Stop	Add Pt. Type CK Iso Alerts
	Modify Time
07:45 08:4	5 Patient Name: CSTSNWORKBOOK, Date: Time: 15-Dec-2017 ♥ ♥ 0745
	3 OK Cancel

- 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



s	elect Operating Room 🗧	x
	LGH Phase - 02	
	🖃 LGH IntraOp - OR	
	LGHOR CAP	
	LGHOR NEW	
	LGHOR GRV	
	LGHOR GRS	
	LGHOR GAR	
	LGHOR KC =	:
	LGHOR WHS	
	LGHOR SEY	
	LGHOR CAT1	
	LGHOR CAT2	
	LGHOR LON	
	LGHOR AddOn 01	
	LGHOR AddOn 02	
	LGH LD 01	·
	OK Cancel	

- 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

int 🛛 🎅 0 minutes ago
PostOp
Schedulir

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*

Perioperative Tracking											U, Full screen 📵 Print 🤜 Z minut
LGH Case Communication LGH P	ref Card LGH Emergency	List LGH PAC	LGH PreOp LGH Intraop	LGH MTR IntraOp LGH OB View	LGH ASC PreOp	SGH Pref Card	SGH Emergency	list SGH PreOp SGH Intraop SGH OB	View SGH Case Communication	LGH Endo Incomplete LGH E	ndo PreOp LGH Endo PostOp
Filter: LGH Bumped Patients To •	🖻 🍓 🚘 🔶 🗾 To	tal Cases: 1									
Status	Case Order Ant. Start	Priority	Booking Date/Time	NPO Status	Ant. Duration	Pt. Type	Iso Alerts	Allergy Patient	Age	Procedure	Surgeon
LGHOR KC (1 case)											
Bumped Patient	4 12:00	E4: < 48 hours			60	Inpatient		CSTSNTOOK, STPERE	EGRIN 60 years	"Arthroplasty Cemented H	fip" Plisvcw, T

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:

lip Fracture Diagnosis Code:	
Acute Hip Fracture - In Hospital	-
ime Critical Procedure Time (hrs):	
18	

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



P Po	werChart Organizer for Te	estCST, Scheduler-Peri	ioperative5 SX								
Task	Edit View Patient	Chart Links Nat	rigation Help								
Perio	perative Tracking 🎍 Pat	ient List 🐞 Case Sele	ction 🎬 Time-Critical Procedures 🎬 LearningLIVE	🛫 🕴 😋 CareConnect 😋 PHSA PACS 😋 VCH and PHC PACS 🚳	MUSE 🜊 FormFast WFI 🝦						
1 🗐 D	🕮 Ein 📷 Adrice 🔒 PM Conversation - 🕈 Add - 🛞 Documents 🛞 Discem Reporting Portal 👔 Report Builder 🏥 Scheduling Appointment Book 🔑 Report Manager 🌉 Staff Assign 💡										
E 😋 P.	Q Patient Health Education Materials Q Policies and Guidelines Q UpToDate ;										
	* (Ma Recent + Name + Q										
Tim	Critical Procedures						[0] Full screen 👩 Print 💸 1 minutes ago				
25			<u>۵</u>								
Fa	cility: LGH Lions Ga	ate 🔽 Area: S	elect an Area 🔽 Room: Select a	n Area first 🔽 Procedure: Select a Procedure		~					
	Time Remaining	Critical Period	Surgeon 👳	Patient Name	DOB 0	MRN ¢	Procedure Code / Procedure				
►	(13h 6m)	24h	Plisvcw, Tyler, MD	CSTSNBRANDYBUCK, STMERIADOC	30-OCT-1959	700007116	Arthroplasty Cemented Hip				
►	29h 54m	48h	Plisvcw, Tyler, MD	CSTSNTOOK, STPEREGRIN	19-NOV-1957	700007122	Arthroplasty Cemented Hip				
►	43h 54m	48h	Plisvcx, Stuart, MD	CSTSNWORKBOOK, REGSCHED	08-DEC-1997	700008714	Open Reduction Internal Fixation Hip Dynamic Hip Screw				

- 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.
	It turns <mark>Yellow</mark> if the remaining time is less than12 hours
	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







Activity 3.4 – Reschedule Elective to Rapid

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

	Request Action	Appointment Type	Earliest Request Date	Latest R	equest Date	Created	Bv	Date Created	
	Book	ok Surgery PAC 12-Dec-2017 - 8:00		11-Jan-2018 - 18:00 TestSX, So		Scheduler-Perioperative	2 12-Dec-2017 - 11:27		
•									
							1		
utu	re patient appoint Current State	ment(s): Appointment Type	Location	•	Begin Date	/Time	End Date/Time	Created By	Date Created
utu u	re patient appoint Current State Confirmed Confirmed	ment(s): Appointment Type Surgery Surgery PAC w/ Scree	Location LGH Main OR LGH PreAnesthe	10 esia Cinic	Begin Date 13-Dec-201 21-Dec-201	/Time 7 - 10:05 7 - 7:45	End Date/Time 13-Dec-2017 - 10:40 21-Dec-2017 - 8:45	Created By TestCST, Scheduler-Perioperative5 SX TestSX, Scheduler-Perioperative2	Date Created 12-Dec-2017 - 18 12-Dec-2017 - 15
utu 	re patient appoint Current State Confirmed Confirmed	ment(s): Appointment Type Surgery Surgery PAC w/ Scree	Location LGH Main OR ening LGH PreAnesthe	10 esia Cinic	Begin Date. 13-Dec-201 21-Dec-201	/Time 7 - 10:05 7 - 7:45	End Date/Time 13-Dec-2017 - 10:40 21-Dec-2017 - 8:45	Created By TestCST, Scheduler-Perioperative5 SX TestSX, Scheduler-Perioperative2	Date Created 12-Dec-2017 - 18 12-Dec-2017 - 15
utu u	re patient appoint Current State Confirmed Confirmed	ment(s): Appointment Type Surgery Surgery PAC w/ Scree	Location LGH Main OR LGH PreAnesthe	10 esia Clinic	Begin Date. 13-Dec-201 21-Dec-201	/Time 7 - 10:05 7 - 7:45	End Date/Time 13-Dec-2017 - 10:40 21-Dec-2017 - 8:45	Created By TestCST, Scheduler-Perioperative5 SX TestSX, Scheduler-Perioperative2	Date Created 12-Dec-2017 - 18 12-Dec-2017 - 15
utu u	re patient appoint Current State Confirmed Confirmed	merit(s): Appointment Type Surgery Surgery PAC w/ Scree	Location LGH Main OR LGH PreAnesthe	10 tsia Cinic	Begin Date. 13-Dec-201 21-Dec-201	/Time 7 - 10:05 7 - 7:45	End Date/Time 13-Dec-2017 - 10:40 21-Dec-2017 - 8:45	Ceated By TestCST, Scheduler-Peroperative5 SX TestSX, Scheduler-Peroperative2	Date Created 12-Dec-2017 - 18 12-Dec-2017 - 15

- 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:

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

DATASHEET

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

1

- 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

Perioperative Summary	□ ♂ ▼ ち ⊄ 않 ♂ 少 叫叫								
Perioperative Doc									
	LGH IntraOp Record - OR 👻	Durand un	and and (Fundame	Description	Catalan #	Carlet Montheau	Lat Number	Manufactures	Cru A
Patent Information Patent Information Patent Information CareConnect Allergie Diagnoses and Problems Histories Results Revex Orders Results Revex Parinoparative Doc	LGH Handly Record -OR	Procedure In Procedure In Procedure In Procedure Procedure Procedure Procedure Procedure Procedure	ILA v e	Description	Catalog # 12345678	Setial Number	Lot Number	Manufacturer	Size *
		Add Modify Remov	ve Clear					<< Pr	Next>>

- 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 X 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)

1

2



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



Login to Schapptbook to launch the Scheduling Appointment Book

Books Appointment	1
Bookshelf - LGH Department of Perioperative Services	Open
LGH Main OR LGH MTR LGH Labor and Deli LGH PreAnesthesta	Select

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.

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

CSTSNWORKBOOK, REGSCHED	Details Orders Resource List Guidelines Appointment Eligibility	
∥ CSTSNWORKBOOK, REGSCHED	Details Orders Resource List Guidelines Appointment Eligibility CSTSNWORKBOOK, REGSCHED *Primary Surgeon: PreAnesthesia Clinic Screening *Primary Procedure?: Yes Duration: @ Historical Average @ Recent Average @ Default	
	Optional Search Existing Orders Privileges AOS Required PreAnesthesia Oritic Anesthesia and Nurse Visit PreAnesthesia Oritic Anesthesia AVE PreAnesthesia Oritic Anesthesia Nurse Visit PreAnesthesia Oritic Proof PreAnesthesia Oritic Proof PreAnesthesia Oritic Proof Oritic Proof PreAnesthesia Oritic Proof PreAnesthesia Oritic Proof Oritic Proof PreAnesthesia Oritic Proof Oritic Proof Oritic Proof Oritic Proof PreAnesthesia Oritic Proof Oritic Proof Oritic Proof Oritic Proof PreAnesthesia Oritic Proof Oritic Proof Oritic Proof Oritic Proof PreAnesthesia Oritic Proof Oritic Proof Oritic Proof Oritic Proof PreAnesthesia Oritic Proof Oritic Proof Oritic Proof Oritic Proof PreAnesthesia Oritic Proof Oritic Proof Oritic Proof Oritic Proof PreAnesthesia Oritic Proof Oritic Proof Oritic Proof Oritic Proof Proof Oritic Proof Oritic Proof <td>0</td>	0

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

Request for Book					? 🗙
me: CSTSNWOR			MRN: 700008714	DOB: 08-Dec-1997	
	RECOR, REGORIED		Age: 20 Years	Sex: Female	
CSTSNWORKBOOK, REG	Scheduling Criteria Summary General Details Orders Guideline	Notification Conversation Summarie	Eligibility Booking Notes		
	Appointment Date Or Requested date range:	12-Dec-2017	🗎 💌 11-Jan-2018		× •
	Request in:	1 Days	✓ From: 12-Dec-2017		× v
	Mon Tue	Wed	Thu Fri	Sat	Sun
	Appointment Time				
	Time range:	0800	1800		
	Time restrictions:	AM Only			· ·
	Request List All request lists: MI RF Initial Queue	*	Selected request lists:		
	MI US Initial Queue MI US P1 MI US P2				
	MI US P3 MI US P4				
	MIXR Initial Queue SN - LGH Surgery Waltist				
	SN - PAC Anesthesia Only Request SN - PAC Cancer Screening		19		
	SN - PAC No Surgery Date Screening SN - PAC Nurse and Anesthesia Request		Defend		
	SN - PAC Nurse Request	Se	Deraut		
	3N - FAC Other Request	=			
	SN - PAC Phone Request SN - PAC/JRAC Surgery Booked				
	SN - RASC Surgery PAC Screening				
	Unknown Request Queue	-			
4 III	V Show all				
	<u> </u>				
				ОК	Cancel

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

CSTSNIMOR	KROOK RECSCHED		MRN: 700008714	DOB: 08-Dec-19	97
e. Coronwon	RBOOK, REGISCHED		Age: 20 Years	Sex: Female	
CSTSNWORKBOOK, REG	Scheduling Criteria Summary General Details Ord	lers Guidelines Notification Conversation Summar	es Eligibility Booking Notes		
Surgery PAC	Appointment Date	12-Dec-2017	🚔 💌 11-Ja	n-2018	
	Request in:	1 Days	- From: 12-De	ic-2017	A V
	Mon Tue	Wed	Thu Fri	Sat	Sun
	Appointment Time				
	Time range:	0800	1800		
	Time restrictions:	AM Only			
	Request List				
	All request lists:		Selected request lists:		
	Appointment Neviews	Â	SIN - PAC Nurse/Anestnesia Screening	1	
	Firtura Requeste				
	Parahadi da Paraurata				
	Triage List				
	Inage List	=			
	watist				
	MI BD Initial Queue				
	MI CT Initial Queue		-		
	MICT P1				
	MICT P2		4		
	MICT P3		*		
	MICT P4		et Default		
	MI EC Initial Queue		or borden		
	MIEC P1				
	MLEC P2				
	MLEC P3				
	MI EC P4				
	MLIB Initial Queue				
	MI MG Initial Quarter				
	MI MR Initial Quarter	-			
	V Show all	*			
	L				

25. Click **OK**



Request for Book Window Closes

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

Access Request List Inquiry

Schedule Inquiry - Surgery PAC No Date Request C	Queue							() E
Task Edit View Help								
Task Earch Temp								
🖸 🌠 🌃 🖉 🔂 🗇 🎼 🎒 🖑 🔕 .	🌂 👸 🗃 🖼 🚼 🚺 🎜 💐 🔕 🛽	🔍 🕑 🖋 💰 🛯 🏁						
			MBN		DOB-			
lame:								
danio.			Age:		Sex:			
Request List	Earliest Date Time Primary Procedure	Surgeon Specialty Primary Surge	on Patient Name	Location	Appointment Type	MRN BC PHN	Birth Date	Requ ⁴
	25-JUL-2016 18:00		TEST, CSTPRODBCRN	LGH PreAnesthesia Clinic	Surgery PAC w/ Screening	70000082	13-AUG-2016	SN-F
Inquiry:	10-AUG-2016 07:18		TEST, CSTPRODBCA	LGH PreAnesthesia Clinic	Surgery PAC w/ Screening	700000215 9878094323	06-SEP-2016	SN - F
Surgery PAC No Date Request Queue	22-AUG-2016 18:04		TEST, CSTPRODBC	LGH PreAnesthesia Clinic	Surgery PAC w/ Screening	70000080	16-AUG-2016	SN-F
	01-SEP-2016 00:00		CSTPRODBCSN, SURGERYPACTWO	LGH PreAnesthesia Clinic	Surgery PAC w/ Screening	700000447 4598045809	01-OCT-1980	SN-F
Request List Queues:	05-SEP-2016 07:45		CSTPRODBCSN, MEDSREC	LGH PreAnesthesia Clinic	Surgery PAC Anesthesia Only	700000590 9876855423	01-OCT-1980	SN-F
SN - PAC Nurse/Anesthesia Screening +	05-SEP-2016 08:09		CSTPRODBCSN, WAITLIST	LGH PreApesthesia Clinic	Surgery PAC w/ Screening	700000521 0032487975	01-OCT-1970	SN-F
	05-SEP-2016 08:16		CSTPRODBCSN, WAITLISTTWO	LGH PreAnesthesia Clinic	Surgery PAC w/ Screening	700000522 3490384234	01-OCT-1950	SN - F
Location type:	05-SEP-2016 08:40		CSTPRODBCSN DYNAMICDOCTHREE	I GH PreAnesthesia Clinic	Surgery PAC w/ Screening	700000591 2394328042	01-JAN-1950	SN - F
Surgery -	10-SEP-2016 13:14		ZZTEST, ANNIE	LGH PreAnesthesia Clinic	Surgery PAC w/ Screening	700000660 9878104843	04-OCT-2016	SN-F
	12-SEP-2016 07:45		CSTPRODRCSN ANESTHESIA	I GH PreApesthesia Clinic	Sumery PAC w/ Screening	700000702 34534532435	01-OCT-1970	SN - F
Location:	18-SEP-2016 09:00		CSTSNBEZNOB STIBENT	I GH PreApesthesia Clinic	Sumery PAC w/ Screening	700000768 9878396126	17-0CT-1980	SN - F
LGH PreAnesthesia Clinic 🔶	20.SEP.2016 10:17		CSTPRODBCSN MEDSBEC	I GH PreApesthesia Clinic	Surgery PAC w/ Screening	700000590 9876855423	01/OCT-1980	SN . F
	25-SEP-2016 16:12		CSTSNKAT STKIT	I GH PreApesthesia Clinic	Summy PAC w/ Screening	700000842 9878395385	24-0CT-1993	SN-F
	26-SEP-2016 09:59		CSTSNPANTSONFIRE STUARUAR	I GH PreApesthesia Clinic	Sumery PAC w/ Screening	700000870 9878395131	26-OCT-1980	SN - F
	08-0CT-2016 08:50		CSTPRODBCSN MEREDITH	I GH PreAnesthesia Clinic	Summery PAC w/ Screening	700000165 9878395392	29-AUG-1980	SN . F
	10-OCT-2016 07:30		CSTPRODECSN MEREDITH	LGH PreApesthesia Clinic	Surgery PAC w/ Screening	700000165 9878395392	29-AUG-1980	SN - F
	16-0CT-2016 11-30		CSTSNARROW STGREEN	I GH PreAperthesis Cinic	Surgery PAC w/ Screening	700001202 9878391775	15-NOV-1970	SN . F
	22 OCT 2016 09:00		COTORON STELECTIVE	I GH Pro Accethosia Cinic	Surgery Frie W/ Screening	700001202 9070300202	21 NOV 2000	CN C
	24.007-2016 10:00		COTTAN STELECTIVE	IGH ProApathasia Clinic	Surgery FAC w/ Screening	700001238 3878386333	10. JAN. 1990	SN . C
	24 OCT 2016 10:00		TECT TECT	LCH ProAssathasis Cisis	Surgery FAC w/ Screening	700000000 0070300640	11 OCT 1995	CN C
	240CT 2016 10:00		COTTON STOLDGERY	LGH Pre Anasthasia Chris	Surgery PAC w/ Screening	700000633 3676363346	01 NOV 2000	SN 0
	25 OCT 2016 02:55			IGH Pro/losethesia Cirilo	Summer PAC w/ Screening	700001354 3676365676	10 MAR 2000	SN . F
	25-0CT 2016 00.00		CSTSN, STSUDGERYTWO	LCH PreAsethesia Chris	Surgery FAC w/ Screening	700001351 0070305071	10 MAD 2000	CNL
	20 OCT 2016 03:00		CSTREODENIKELLY STORAGE ANNE	LGH Pre Anesthesia Circia	Surgery PAC w/ Screening	700001331 3070303071	04 APD 1000	CN C
	250012010 07.00		COTPRODUCEN MEDEDITU	LCH PreAriestinesia Cirile	Sugery PAC w/ Screening	700000434	20 AUC 1000	CN C
	25-001-2010 10:00		COTTNODECSN, MERCENTIN	LCII De Asethesia Ciric	Surgery FAC w/ Screening	700001305 00703033332	25-NOU-1000	CNL
	25001-2016 12:00		CSTREODARCH SUNOUESTE	LGH Prevnesnesia Cinic	Surgery PAC w/ Screening	700001363 3676366673	23400-1360	CN C
	00 NOV 2010 03-10		COTRODANCH, SUNQUESTE	LCH PreAnesthesia Ciric	Surgery PAC w/ Screening	700001333 3676336004	21.000-13/6	CN I
	03-NOV-2016 01:05		COTEN CTEANEELEICUT	LCH PreAnestnesia Cinic	Surgery FAC W/ Screening	700000335 5676366741	21-SEF-1300	SN-F
	06-NOV-2016 07:30		CSTSN, STCANCELEIGHT	LOH Prevnestnesia Ciric	Surgery PAC w/ Screening	700001470 3878326477	14-3/4/14-13/0	SIN - F
	06-NOV-2016 11:15		CSTPRODUCSN, DTNAMICDOCTWO	LGH PreAnestnesia Cinic	Surgery PAIC W/ Screening	700000453 9878310246	01-001-1976	SIN-F
	00-NOV-2016 12:30		CSTONDAVICIND CTCAMAX	LGH PreAnesthesia Cinic	Surgery PAC w/ Screening	700001516 3878308042	06-DEC-1970	CN C
	06-W0V-2016 13:30		CSTSNDAVISJNN, STSAMMIT	LOH Prevnestnesia Ciric	Surgery FAC w/ Screening	700001517 3878308035	00-DEC-1500	SIN - F
	07-NOV-2016 08:30		CSTSN, STCANCELFOUR	LGH PreAnestnesia Cinic	Surgery PAC w/ Screening	700001460 9878327311	09-SEP-19/0	SN-F
	08-NOV-2016 09:00		CSTSN, STBUMPINGUNE	LGH PreAnestnesia Cinic	Surgery PAC w/ Screening	700001522 9878305506	15-OC 1-1945	SIN-F
	09-NOV-2016 08:00		LSTSN, STPOSTPONEONE	LGH PreAnesthesia Clinic	Surgery PAC w/ Screening	700001476 9878326209	12-MAR-1930	SN-F
	U9-NOV-2016 08:00		CSTPRODBCSN, DTNAMICDOCTHREE	LGH PreAnestnesia Cinic	Surgery PAC w/ Screening	/00000591 2394328042	01-JAN-1950	SN-F
	12-NOV-2016 09:00		CSTSN, STPOSTPONETHREE	LGH PreAnesthesia Clinic	Surgery PAC w/ Screening	/0000149/ 98/83225/3	30-MAR-1980	SN-F
	12-NOV-2016 14:00		CSTSN, STPACFOUR	LGH PreAnesthesia Cinic	Surgery PAC w/ Screening	/00001619 98/8280/91	12-AUG-1990	SN-F
	13-NUV-2016 07:45		CSTPRODBCSN, WAITLISTTHREE	LGH PreAnesthesia Clinic	Surgery PAL w/ Screening	/00000523 495/83495/	01-001-1970	SN-F
	13-NOV-2016 08:35		USTPRODBCSN, DYNAMICDOC	LGH PreAnesthesia Clinic	Surgery PAC w/ Screening	/00000420 3940358045	01-NOV-1990	SN-F
	13-NOV-2016 09:00		CSTSNBRITE, STRAINBOW	LGH PreAnesthesia Clinic	Surgery PAC w/ Screening	/0000150/ 9878321793	19-DEC-1990	SN-F
	15-NOV-2016 09:30		USTPRODBCSN, SURGERYREQUEST	LGH PreAnesthesia Clinic	Surgery PAC w/ Screening	/00000418 1249054950	01-OCT-1980	SN - F
	16-NOV-2016 11:00		CSTSNTREE, STCHERRY	LGH PreAnesthesia Clinic	Surgery PAC w/ Screening	/0000940 9878391886	11-OCT-1950	SN - F
	19-NOV-2016 07:45		CSTPRODBCSN, WAITLISTTHREE	LGH PreAnesthesia Clinic	Surgery PAC w/ Screening	700000523 4957834957	01-OCT-1970	SN - F
	19-NOV-2016 12:00		CSTPRODBCSN, WAITLIST	LGH PreAnesthesia Clinic	Surgery PAC w/ Screening	700000521 0032487975	01-OCT-1970	SN - F
	21-NOV-2016 15:14		CSTDPRODSNGAGA_STLADY	I GH PreAnesthesia Clinic	Sumery PAC w/ Screening	700000363	03-SEP-1996	SN - F

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





Contact				· •ו
Nomer		MRN: 700008714	D0B: 08-Dec-1997	
Name: 0	LSTSNWURKBUUK, REGSCHED	Age: 20 Years	Sex: Female	
B-€ CS	General Summary Guidelines Notification Conversation Summaries Itineraries Locks Booking Notes			
۰.	Date:	Time:		
	13-Dec-2017	1018	A.	
	Comments:			
	Phone Call Attempt 1			^
< - +				
			OK Car	CM

- 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

Appointment Attributes		? 🗙
	Details Orders Resource List Guidelines Appointment Eligibility	
	*Primary Surgeon:	
	Additional Information:	
	Additional Provider:	
	Urgent Request:	
	Private Surgical Comments:	
		-
	Public Surgical Comments:	
		·
		-
<		
	ОК	Cancel

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



🛱 Appointment Attributes		? 💌
Appointment Attributes STSNWORKBOOK, REGSCHED Surgery PAC w/ Screening	Details Orders Resource List Guidelines Appointment Eligibility CSTSNWORKBOOK, REGSCHED *Primary Surgeon: Plisvew, Tyler, MD *Primary Procedure?:	
	Yes Duration: Historical Average Recent Average Default Default Default Default	• 0 0 30 0
	Optional Search Existing Orders Privileges AOS Required PreAnesthesia Clinic Anesthesia and Nurse Visit PreAnesthesia Clinic Anesthesia and Nurse Visit PreAnesthesia Clinic Anesthesia and Nurse Visit Anesthesia Anesthesia <td>0</td>	0
< III >	ОК	Cancel

- 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.

					MRN: 700008		DOB: 08-Dec-1997		
Name, CSTSNWORKBO	OK, REGSCHED				Age: 20 Year		Sex: Female		
4 2017 ►	Books Appointment				Work in progress				Schedule
∢ December → Su Mo Tu We Th Fr Sa	Person name: CSTSNWORKBOOK, REGSCHED				love	gery PAC w/ Screening (Saturday, 11- Current Schedule	-Nov-2017)		Confirm
26 27 28 29 30 1 2 3 4 5 6 7 8 9	Appointment type: Surgery PAC w/ Screening				ear T	EGH PreAnesthesia Clinic	oms		Recur
10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 20	Appointment location:			A	NR	└-S Patient			Suggest Request
31 1 2 3 4 5 6	LGH HeAnesthesia Clinic			Ψ					Insert
					៣៩				-
LGH OCC Rm 7 (Exam) [0	LGH OCC Rm 8 (Exam) [0]	LGH OCC Rm 9 (Exam) [0]	LGH OCC Rm 10 (Exam) [0]	LGH OCC Rm 11 (Consult) [0]	LGH OCC Phone 1 [0	LGH OCC Phone 2 [0]	LGH OCC Phone 3 [0]	LGH OCC Phone	: 4 [0]
7.05 7.10 7.15 7.20 7.25 7.30 7.35 7.45 7.45 7.50 7.55 7.55	SN PAC Nurse/Anesthesia				SN PAC Nurse Phone Intervi	SN PAC Nurse Phone Interview	SN PAC Nurse Phone Interview	SN PAC Nume Phone I	Interview
8.00 8.00 8.01 8.01 8.10 8.01 8.21 8.20 8.20 8.20 8.30 8.33 8.40 8.40	SN - BRFAK	SN PAC/OCC	SN PAC/OCC		SN - BRFAK	SN - RRFAK	SN - BRFAK	SN - BRFAK	
8:50						on oneset	or one of	on onen	

- 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



Schedule - Surgery PAC w/ Screening
Resource:
LGH OCC Phone 1 🗸
Default slot:
SN PAC Nurse Phone Interview (7:45 - 8:45)
Time: 0745
Image: Second
Distinguish setup and cleanup durations
Apply Duration Change to Order OK Cancel

12. Click OK

Name: CSTSNW/OPKBO						MRN: 700008714		D08: 08-Dec-1997		
Mame. Coroitwonkbo	OK, HEGSCHED					Age: 20 Years		Sex: Female		
₹ 2017 →	Books Appointment					Work in progress:				
Image: system Image:	Person name: CSTSNWORKBOOK, REGSCHED Appointment type: Surgery PAC w/ Screening Appointment location:				Nove ►	CSTSNWOR	KBOOK, REGSCHED VAC w/ Screening (Saturday, 11-1 nt Schedule SH PreAnesthesia Clinic LGH PreAnesthesia Clinic Roos Patient	Nov-2017) nz		hedule Confirm Recur Suggest
24 25 26 27 28 29 30 31 1 2 3 4 5 6	LGH PreAnesthesia Cinic			v					B	equest
Instruction Instruction 7.00 7.00	Cost OCC Fin 8 (Exam) [0] Costd SN PAC Nurse/Averthese	Corr OCC Fin S (Exam) [0]	Loft Occ Him 10 (Exam) (U	og <u>Estroce van Tricanaut</u> joj SN- <i>Anathesio</i> logii Reserved	Cosed Cosed CSTSNWC Surgery PA PreAnesthe	DRKBOOK, REGS (2w) Streening esia Clinic Phone Cal	Cored Sti PAC Nose Phone Vennew	Cosed	Cosed	
8:00 8:00 8:00 8:00 8:00 8:00 8:00 8:00 8:20 8:20 8:20 8:30 8:30 8:30 8:30 8:30 8:35 8:40 8:46 8:46	SN- BREAK	ISN PACIOCC	SN PACIOCC		Playce, Ty 1 Hour(s) Pending SN - BREAM	vier. MD	SN - BREAK	SN - BREAK	SN - BREAK	

- 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 Cre

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.....

4 Available Conversations	×
Please select the conversation you would like to use:	
Pre-Register Outpatient	•
ОК	

- 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

Pre-Register Outpatient												
Medical Record Number. 700008714	Er	ncounter Number	Last Name: CSTSNWORKBOOK		First Name: REGSCHED	Middle Name:	Preferred Name:	Previous Last Name:	Maiden Name:	Date of Birth 08-Dec-1997	Age: 20Y	
Gender: Female	. 9	C PHN: 1876414662	Pre-Reg Status: Incomplete		Images							
ALERTS Patient Informatio	n Er	ncounter Information Insurance	e Insurance Summary A	dditional	Contacts							
Pre-Outpatient	٠	Anesthesiology	PAC Visit		Heterial Source.	•						
- Location		Building	Link /Claim									
LGH PAC		LGH PAC ·	LGH PAC									
- Care Providers												
Attending Provider		Primary Care Provider (PCP)	PCP Verified?		Referring Provider							
- Patient Privacy												
Visitor Status:	-											
Comment												
Comment												
Previous Comments:												
												Ç 📖
- Account Data												
Pre-Reg Date		Pre-Reg Time:	Pre-Reg User Name:		Estimated Arrive Date:	Estimated Anive Time						
12-Dec-2017		08:40	TestSX, Scheduler	r-Periop	13-Dec-2017	• 00.00	÷					
											Comple	ete Cancel

- 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:

Outside Requested Range	
You have selected a date or time outside of the requested scheduling range of Saturday, November 11, 2017 - Wednesday, January 10, 2018 at 15:15 - 23:59 on Monday, Tuesday, Wednesday, Thursday, Friday.	
Cancel Override Guidelines]

Click **Override** to Disable the Prompt.

Outside Requested Range	×
Override	
*Ovemde Reason:	
SN - Scheduling PAC	- I
Comment text:	
	*
	-
OK Can	cel

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 associated Surgical Appointment (Refer to the Scheduling Foundation Course) on how to set a link.



Note: If the Patient has a **Linked Appointment** icon **2**, this signifies that two or more appointments have been tied together to the confirmed PAC Appointment.





1



Activity 5.2 – Perform a Surgical Case Check-In



Login to PowerChart and access Perioperative Tracking.

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

PowerChart Organizer for TestSX, Scheduler-Perioperative2					
Task Edit View Patient Chart Links Case Actions Provider List	Help				
Perioperative Tracking 🛔 Patient List 📁 Case Selection 🎬 Time-Critical Proces	ures 🎬 LearningLIVE 🚽 🗟 CareConnect 😋 PHSA PACS 🧟	VCH and PHC PACS 🕄 MUSE 🔇 FormFast WFI			
📆 🔤 🎽 AdHoc 🔒 PM Conversation 🔹 🕂 Add 🔹 📻 Documents 🝙 Discern	Reporting Portal 🖀 Report Builder 🏙 Scheduling Appointment	Book 🔯 Report Manager 🎇 Staff Assign			
🙀 Patient Health Education Materials 🙀 Policies and Guidelines 😭 UpToDate					
				•	الله Recent - Name - ۹
Perioperative Tracking				(D) Fu	ll screen 🛛 🛱 Print 🕹 0 minutes ago
SGH Pref Card SGH Emergency List SGH LGH Case Communication LGH Pref Card	PreOp SGH Intraop SGH OB Vie LGH Emergency List LGH PAC	W GGH Case Communication	LGH Endo Incomplete LGH MTR IntraOp	LGH Endo PreOp LGH OB View	LGH Endo PostOp LGH ASC PreOp
Filter: LGH PAC Today 🔹 💌 🔞 📾 🌳 🚺 Total Cases: 3 Patien	t: CSTSNWORKBOOK, REG •				
Status PAC Time PAC Location	Patient Age/Sex Alerts	Allergy Anesthesiologist	Old Chart Status Proc. Date	Procedure Su	rgeon PAC Visit Type
LGH OCC Rm 8 (Exam) (1 case)					
12-Dec-2017 09:00:00	CSTSNWORKBOOK, 20 years / REGSCHED Eemale	9		Pli	svcw, Tyler, MD PreAnesthesia C Anesthesia Visit

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:

Location Selection		
	Area Selection	
Existing	Recent	
 □□· 【二 LGH Endose □□· 【二 LGH Main C □□· 【二 LGH MTR □□· 【二 LGH Out of □□· 【二 LGH PreAnd □□· 【二 LGH Private □□· 【二 SGH Main C □□· 【二 SGH Out of 	OR OR esthesia Clinic Clinic dation Rooms DR OR	
Start Location:		
Area	2	OK Cancel

4. Click LGH PreAnesthesia Clinic



- 5. Click OK
 - SurgiNet: Surgical Case Check-In window displays

✓ SurgiN	SurgiNet: Surgical Case Check-In									
Check	y Check In Associate Encounter Change Add-On Status Sign Document Print ▼ Preview ▼ 🗱 Location (LGH PreAnesthesia Clinic)									
Select By Date Percent Cas Prove MR	y: son e Number vider N	Criteria: * From Date: 13	-Dec-2017	• * To Date: 13-Dec-2017	A V Retr	ieve				
Add-On	Status (Checked In	Surgery Time 🛦	Person Name	FIN	Case Number	Primary Surgeon	Primary Procedure	Procedure Free Text	OR
	[07:45	CSTSNWORKBOOK, REGSCHED	700000016443	LGHPA-2017-333	Plisvcw, Tyler, MD	PreAnesthesia Clinic Anesthesia and Nurse Visit		LGH OCC Rm 8 (Exam)

- - Check In window displays

🔁 Check In	? 🔀
	MRN: 700008714 DOB: 08-Dec-1997
Name. CSTSNWORKBOOK, REGSCHED	Age: 20 Years Sex: Female
CSTSNWORKBOOK, REGSCHED neral Summary Details Orders Guidelines Notification	on Conversation Summaries Itineraries Locks Eligibility < 🕨
Surgery PAC Date:	Time:
12-Dec-2017	1606
Tracking location:	_
<none></none>	•
Comments:	
	A
	-
Duras News	
CSTSNWORKBOOK, REGSCHED Pre-Outpatient	
Guar Pmt Enc Pm	View Modify SetEnc Chames
Request Information	
Status of medical record request:	
	OK Cancel

7. Click OK

🖌 SurgiNet: Surgical (Case Check-In								- 0 <mark>-</mark> ×
Issk Help									
🖌 Check In Assoc	🗸 Check In Associate Encounter Change Add-On Status Sign Document Print + Preview + 🗱 Location (LGH PreAnesthesia Clinic)								
Select By:	Criteria:								
Date Person Case Number Provider MRN	Sect of y Class © Date © Date © Peson Class Number © Case Number * From Date: 13-Dec-2017 © w * To Date: 13-Dec-2017 © WRN * To Date:								
Add-On Star Ch	ecked In Surgery Time ▲	Person Name	FIN Case 1	Number Primary Surgeon	Primary Procedure	Procedure Free Text	OR	Surgery Date	
	12-Dec-2017 16:06 09:00	CSTSNWORKBOOK, REGSCHED	7000000016443 LGHP	A-2017-328 Plisvow, Tyler, MD	PreAnesthesia Clinic Anesthesia Visit		LGH OCC Rm 8 (Exam)	13-Dec-2017	

Key Learning Points

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

1



Activity 5.3 – Navigate Perioperative Tracking and Setting an Event

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 1	racking Set Events					- d 💌
Name:	CSTSNWORKBOOK R		Surg Start Time: 09:00		Anesthesiologist:	
OR: Procedu	LGH OCC Rm 8 (Exam) e: PreAnesthesia Clinic Anest	hesia Visit	Surgeon: Plisvow, Tyler, MD Case #: LGHPA-2017-328			
Intel 100		Detr	Tested Ites News			
0 Status n PAC	Chart Received	12-Dec-2017	8.58 Pt. in Waitin	g Room		
Iow NP	Chart Requested					
uno Sh	EKG					
Patien Pre0	Lab Results Available					
Bumped	PAC Phone Attempt 1.					
hasell	PAC Phone Attempt 2.					
hase I/P	PAC Phone Attempt 3.					
	PAC Left Message.					
Phone	PAC Pt. Request Call Back.					
PostOp	PAC Complete					
lation	Seen by Anesthesia					
itts iso	Seen by Nurse					
art Ale	Seen by Other					
Case C						
						OK Cancel

• Case Tracking Set Events window displays

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

Perioperative Tracking						(D) Full sc	reen 👼 Print 😌 0 minutes ag
SGH Pref Card LGH Case Communication	SGH Emergency List LGH Pref Card	SGH PreOp SGH Intr LGH Emergency List	ICP SGH OB View	w SGH Case Communi	cation LGH Endo Incomplete GH Intraop LGH MTR IntraOp	LGH Endo PreOp LGH OB View	LGH Endo PostOp LGH ASC PreOp
Filter: LGH PAC Today +	🛅 🚳 🍰 🤹 🛐 Total Cases: 3	B Patient: CSTSNWORKBOOK, REG +					
Status	PAC Time PAC Loci	ation Patient	Age/Sex Alerts	Allergy	Anesthesiologist Old Chart Status	Proc. Date Procedure	Surgeon
LGH OCC Rm 8 (Exan	n) (1 case)						
•	12-Dec-2017 Pt. in Wa 09:00:00	iting Room CSTSNWOR REGSCHED	KBOOK, 20 years / Female	្ដ			Plisvcw, Tyler, MD



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.
- 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

CSTSNWORKBOOK, REGSO	CHED 🗵									List 🔿 🥻 🖀 Recen	it - Name	- Q
CSTSNWORKBOOK, REGS	CHED	DOB:08-Dec-1997 Age:20 years	MRN:70000871 Enc:700000001	.4 6533	Code Status:			Process: Disease:	Location:I Enc Type:C	.GH PAC Dutpatient		
Allergies: Allergies Not Recorde	d	Gender:Female	PHN:98764146		Dosing Wt:			Isolation:	Attending:			
Menu	< > - ≜	Orders									(C) Print	net the test of te
Perioperative Summary	🕂 Add 🖓 Docur	ment Medication by Hx 🚴	Check Interactions							Reconciliation Statu	JS	
										Meds History	Admissio	n 🙂 Outpatient
Patient Information	Orders Documen	nt In Plan										
Documentation 🛛 🕂 Add			K	Distant	AL 4 - 6 0 - 4 1 AL 6 6	adam 1410 day 5 Days						and the Order
Form Browser	Orders for Signs	View	1	Displayed A	All Active orders (All mactive c	inders (All Orders 5 D'ays i	ack					row more unders
CareConnect	Plans	nuie		Ð	🕅 Order Name	Status	Dose	Details				
Allergies	Document In	Plan		⊿ Labora	tory							
	Suggested Plans	s (0)			Glucose Random	Future (On Hold)		Blood, Routine, *Est. Collection:	21-Dec-2017 +/- 2 day, once, Order for future v	isit		
Diagnoses and Problems	Orders											
	Admit/Tran	nsfer/Discharge										
Results Review	Status											
Orders 🕂 Add	Activity	c										
Perioperative Doc	Diet/Nutriti	ion										
	Continuous	s Infusions										
	- Medication	5										
	Blood Prode	ucts										
	🗾 Laboratory											
	- Diagnostic	Tests										
	Procedures											

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

Stat
No order

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



Order statuses to view Active statuses: Ordered InProcess Future Incomplete Suspended On Hold, Med Student Include all days	Inactive statuses: Discontinued Canceled Completed Pending Complete Voided Voided Transfer/Canceled Include all days	Load the following types of orders Inpatient orders Ambulatory (In Office) orders Prescriptions Documented medications Miscellaneous Show individual instances for continuing orders Inactive Regimen Filter Inactive Plan Filter
Include number of days: Save	Save As Apply New	Remove Cancel

	Displayed: All Active Orders All Inactive Orders All Active Orders					
	<i>S P</i>	Order Name	Status	Dose	Details	
	⊿ Laboratory					
		Glucose Random	Future (O		Blood, Routine, *Est. Collection: 12-Feb-2018 +/- 2 day, once, Order for future vis	it
Ш						
Ш						
Ш						
Ш						

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:



	S	₿?		7	Order Name		Status	Dose	Details	*
		f b		2	Insert Periphe	ral IV	Processing		20-Nov-2017 11:46 PST	
		9		2	Insert Urinary	Cath	Proposal		20-Nov-2017 11:31 PST, Indwelling	
		ð	\checkmark	2	Morse Fall Ris Assessment	k	Ordered		17-Nov-2017 14:05 PST, Stop: 17-Nov-2017 14:05 PST Order entered secondary to inpatient admission.	=
		0		2	Vital Signs		Proposal		20-Nov-2017 11:25 PST, q4h while awake	
►		٠	\checkmark	뚳 😨	Vital Signs		Ordered		17-Nov-2017 16:24 PST	
⊿	Me	dica	tion	s						
		@	\checkmark	ेल 🎦	furosemide		Ordered		20 mg, IV, as directed, order duration: 5 day, drug form: inj, start: 17-Nov Administer pre red blood cell transfusion	Ŧ
٠	_		111						•	

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.

Orders Document In Plan		
View	Displayed: All Active Urders (All Inactive Urders (All Urders 5) Days Back Show More	e Urders
· Orders for Signature		
Plans	Image: Second status Descend status	
Document In Plan	/ Laboratory	
Suggested Plans (0)	Glucose Random Future (On Hold) Blood, Routine, *Est. Collection: 21-Dec-2017 +/- 2 day, once, Order for future visit	
Orders		
Admit/Transfer/Discharge		
- Status		
Patient Care		
Activity		
- Diet/Nutrition		
Continuous Infusions		
Medications		
Blood Products		
U Laboratory		

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

View	Displayed: All Active Orders (All Inactive Orders 5 Days Back	Show Mare Orde
ders for Signature ins bocument In Plan gested Plans (I) ders darsit Patient Care Status Patient Care Status Medications Medications Medications Biood Products Diagnostic Tests Procedures Respiratory Diagnostic Tests Procedures Communication Orders Supplies Non Categorized decication History Edication History Edication History	Image: Status Dose Details Image: Status Example for the status Blood, Routline, "Ext. Collection: 21-Dec-2017 */-2 day, once, Order for full Renew Modify Copy Cancel and Reorder Support Support Complete Complete Concel Image: Status Order Information Print Print Advanced Filters Customize (Filters Customize (Filters Visite Customize (Filters Visite Customize (Filters Visite Customize (Filters	ture Visit

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



View Optigety At Addive Orders 1All Indexine Onders 1All Onders 5 Dags Back. Show Mod D Orders for Signature Image: Construction of Construction 1All Onders 5 Dags Back Image: Construction of Construction 1All Onders 5 Dags Back Image: Construction of Construction of Construction 1All Onders 5 Dags Back Image: Construction of Construction 1All Onders 5 Dags Back Image: Construction of Construction 1All Onders 5 Dags Back Image: Construction of Construction 1All Onders 5 Dags Back Image: Construction of Construction 1All Onders 5 Dags Back Image: Construction of Construction 1All Onders 5 Dags Back Image: Construction of Construction 1All Onders 5 Dags Back Image: Construction of Construction 1All Onders 5 Dags Back Image: Construction of Construction 1All Onders 5 Dags Back Image: Construction of Construction 1All Onders 5 Dags Back Image: Construction of Construction 1All Onders 5 Dags Back Image: Construction of Construction 1All Onders 5 Dags Back Image: Construction of Construction 1All Onders 5 Dags Back Image: Construction of Construction 1All Onders 5 Dags Back Image: Construction of Construction 1All Onders 5 Dags Back Image: Construction of Construction 1All Onders 5 Dags Back Image: Construction of Construction of Construction 1All Onders 5 Dags Back Image: Construction of Construction 1All Onders 5 Dags Back Image: Construction of	Orders Document In Plan		
Orders for Signature Image: Convent In Plan Suggested Plans (D) Image: Convent In Plan Admit Transfer/Discharge Status Patient Care Activate Extent Care Activate Exten	View	Displayed: All Active Orders All Inactive Orders All Orders 5 Days Back	Show More Orders
Image: Second listory Image: Second listory Image: Second listory Image: Second listory <th>Orders for Signature Plans Document in Plan Suggeted Plans (0) Orders Admid/Transfer/Discharge Statu Patient Care Admidy Disc/Nutrition Continuous Infusions Blood Products Glaboratory Diagnostic Tests Procedures Respiratory Blaign Heath Consults/Referals Communication Orders Sugges</th> <th>Image: Status Dose Details Jaboratory Activate Blood, Routine, Collection: 12-Dec-2017 16-57 PST, once</th> <th></th>	Orders for Signature Plans Document in Plan Suggeted Plans (0) Orders Admid/Transfer/Discharge Statu Patient Care Admidy Disc/Nutrition Continuous Infusions Blood Products Glaboratory Diagnostic Tests Procedures Respiratory Blaign Heath Consults/Referals Communication Orders Sugges	Image: Status Dose Details Jaboratory Activate Blood, Routine, Collection: 12-Dec-2017 16-57 PST, once	
Related Results Collection Date/Time: Date Scale Ito 1 1657 PST Frequency: once v Formulary Details Output: En Designation Output: En Des	Reconciliation History Medication History Medication History Reconciliation History Related Results Formulary Details Variance Hearter		A United For Simplers

5. Click Orders For Signature

Orders Document In Plan					
H	Orders for Signature				
View	20 0 B 8	Order Name	Status	Start	Details
View Orders for Signature Plans Orders Plans Orders Plans Suggeted Plans Orders Plans Plans Plans Plans Plans Pland Plans Pland Pland Pland Pland Pland Pland Pl	Didet for Signature 「参 ⑤ 序 ♡ ▲ LöHPAC Enc7 ▲ Läboratory Laboratory	Order Name 000000016533 Adm Glucose Random	Status it: 12-Dec-20 Activate	Start 17 17:04 PST 12-Dec-2017 17:08.	Details Blood, Routine, Collection: 12-Dec-2017 17:68 PST, once
d, Reconciliation History					
Related Results	Details				
Formulary Details	L				
Variance Viewer	0 Missing Required D	etails Orders For Co	signature 🛛 🕅	Irders For Nurse Review	Sign

6. Click Sign



< > - 🔒 Orders					[II] Full screen	🛱 Print	€ 8 minutes ag
🕂 Add 🍣 Document Medication by Hx À Check Interactions					Reconciliation Stat Meds History	tus Admission	1 😗 Outpatient
Orders Document In Plan							
View	Displayed: All Active Orders All Inactive	Orders All Orders 5 Days	Back				w More Orders
Orders for Signature	Norder Name	Status	Dose D	letails			
Document In Plan	⊿ Laboratory						
Suggested Plans (0)	Glucose Random	Processing	В	lood, Routine, Collection: 12-Dec-2017 17:08 PST, once			
Orders							
Admit/Transfer/Discharge							
Status							
Patient Care							
Diet/Nutrition							
Continuous Infusions							
Medications							
Blood Products							
Laboratory							
Diagnostic Tests							
Respiratory							
Allied Health							
Consults/Referrals							
Communication Orders							
Supplies							
Medication History							
Medication History Snapshot							
Reconciliation History							
Related Results	Details						
Formulary Details	Contras Era Continentina - Contras Era	Nuur Daview				Oute	En Cincelon
variance Viewer	Urders For Cosignature Urders For	indise neview				Urdei	is nor signature

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
 - Discern Reporting Portal will display



Reporting Portal				
			Welcome: Test5X	, Scheduler-Perioperative1 Settings Help
Reporting Portal			3 Search for Report Title	
Filters	All Reports (4) My Favorites (0)	2		1 0
	Report Name	- Categories	\$ Source	♦ Favorite ♦
Source	IOL - Scheduled Cases with Specialty Le	ns Perioperative Clerk	Public	Ň
Categories	Patient Route Slip	Perioperative Clerk	Public	2
Pecent Penorts	Scheduling Event ID Report	Perioperative Clerk	Public	●☆
Scheduling Event ID Report	Description:	Suggested Report User:	Reporting Application: 6	Run Report
Patient Route Slip		Suggested Report Frequency:	Alternate Name: BC ALL SURG SCH EVENTID LYT:DBA	Run Report in Background
		Support Reference Number: c88bfe3a-0e9a-43a0-bf64-956b3336b033		View Previous Run
	Waitlist Report for Scheduled Cases	Perioperative Clerk	Public	\$

- 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

Reporting Portal				
⊖ Cerner				
Reporting Portal			Q Search for Report	Title
Filters	All Reports (4) My Favorites (0)			1 0
	Report Name		♦ Source	¢ Favorite ¢
Source	IOL - Scheduled Cases with Specialty Lens	Perioperative Clerk	Public	$\stackrel{\wedge}{\sim}$
 Categories 	Patient Route Slip	Perioperative Clerk	Public	$\stackrel{\wedge}{\sim}$
	Description:	Suggested Report User:	Reporting Application: CCL	Run Report
		Suggested Report Frequency:	Alternate Name: BC_ALL_SURG_PAT_RTE_SLIP_LYT:DBA	Run Report in Background
		Support Reference Number: a96d6c6c-8ef3-4500-9db1-27bd271aaa77		View Previous Run
	Scheduling Event ID Report	Perioperative Clerk	Public	${\searrow}$
	Waitlist Report for Scheduled Cases	Perioperative Clerk	Public	$\stackrel{\sim}{\sim}$

- 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



Discern Prompt: BC_ALL_SURG_PAT_RTE	_SLIP_LYT:DBA	
Output to File/Printer/MINE	MINE	- 8
Search for Patient (Blank for All Patients)		Search
		Remove
	Execute Cancel	
Return to prompts on close of output		
Ready		
	Execute Cancel	
Return to prompts on close of output		
Refreshing form		

8. Click Search

• Person Search window displays

s Encounter Search												×
BC PHN:	VIP 6	Deceased	Alerts Process Alert	BC PHN 987642943	MBN	N 243 (1	Name	IRKROOK REVIEW	DOB 30-Oct-1963	Age 54 Years	Gende Male	er Address
MRN:	0			987642056 987642014	2 700008 3 700008	518 0 545 0	CSTSNWC	IRKBOOK, INTRAOP IRKBOOK, ENDOSCO	09-Aug-1963 PY 30-Nov-1987	54 Years 30 Years	Male Female	590 West 8th. e 12345 Street
Last Name: cstsnworkbook First Name:			Process Alert	987641830 987641830 987641466	2 700008 5 700008 2 700008	577 (714 (CSTSNWC CSTSNWC CSTSNWC	IRKBOOK, POSTOP IRKBOOK, PREOP IRKBOOK, REGSCHE	04-Dec-1997 D 08-Dec-1997	17 Years 20 Years	Male Female	590 West Broa 590 B Avenue
DOB:												
Gender:												
Postal/Zip Code:	•				III							•
Any Phone Number:	Facil	ity GH PAC	Encounter # 7000000016	Visit ‡ 533 70000	00016533	Enc 1 Outpa	Type atient	Med Service Anesthesiology	Unit/Clinic LGH PAC	Room	Bed I	Est Arrival Date 21-Dec-2017 7:45
Visit #:	- -											
Historical MRN:												
Search Reset												
	•									OK		► Cancel

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



Discern Prompt: BC_ALL_SURG_PAT_RTE_SLIP_LYT	DBA	
Output to File/Printer/MINE	MINE	2
Search for Patient (Blank for All Patients)	CSTSNWORKBOOK, REGSCHED	Search
		Remove
Exec	ute Cancel	
Return to prompts on close of output		
Ready		

13. Click Execute

ting Portal			
Portal Patient Route Slip 🗙			
r 4 r 9 d 0 0 <i>8</i> 4	🎽 🔍 🔍 150% 🛛 📲		
Provincial Health Services Authority Hear function	Providence Marcouver Marcouver Marcouver Coastal Health Provide advance door for an Provide advance door for an Encoun	PATIENT ROUTE SLIP Date: 12-DEC-2017 ter Number: 700000016533	
	OTNWORKDOOK DECOMED	Madical Record Number 700009714	
	590 B Avenue Cor A Street Vancouver	Gender: Female DOB: 08-DEC-1997	
<u>Appointment I</u> Location	Date Time Appointment Type	Gender: Female DOB: 08-DEC-1997	

14. Click Et al. 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.