



Future State: Perioperative - Pre Surgical Assessment Clinic (Novari)

Cerner Workflow ID: 1726 (v. 9.0) Client Workflow ID: 114

Last updated by Anjanette Balboa, Mar 07, 2025 11:36am (UTC -4 hours)

Workflow Details:

Workflow Name: Perioperative - Pre Surgical Assessment Clinic (Novari)

Workflow State: Future State

Workstream: Pre-Admission/Pre-Visit

Venue: Perioperative

Client Owner: Boichuk (Doan), Kristen Rachel

Cerner Owner: Chariton,Caitlin M

Standard: Yes

Related Workflow(s):

Tags:

Workflow Summary:

Service Line: Anesthesiology

Related Solution(s): Anesthesia Management
Surgical Management

Project Name: Niagara Health System:OPT-0297674:NIAG_CD Niagara HIS RFP

TestBuilder Script(s):

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Workflow Notes: This workflow outlines the typical steps involved in the Preadmission Testing process. For academic institutions, it's very possible that the PAT Nurse steps would instead be performed by an Anesthesia Resident or SRNA.

Introduced By: WS 1

Validated By: WS 2

Swim Lane:

Role(s): Surgical Scheduler [Custom]

Department(s):

Security Position(s):

Off Page Reference [[32124](#)]

Workflow Link: Perioperative - Schedule Elective Appointment (Novari)

Comments: Only elective Main OR Cases go to the Pre Surgical Assessment Clinic (PSAC) currently.

Within this workflow; the Surgeons Office can initiate an Anesthesia Consult and determine the necessary Pre Surgical Screening Activities to take place during the PSAC appointment.

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Work Step [32258]

Description: OR scheduling office Monitors PSS(PSAC) Request List

Method: Scheduling Appointment Book

Comments: Novari refer's to these appointments and Pre Surgical Assessment items as PSS (Pre Surgical Screening). A PSS Appointment in Novari is a PSAC appointment in Millenium.

Work Step [32266]

Description: Complete Request on Request List

Method: Scheduling Appointment Book

Work Step [32268]

Description: Modify any Details or Fields for the Appointment if necessary

Method: Scheduling Appointment Book

Work Step [32269]

Description: Book into appropriate resource for phone visit or in-person visit

Method: Scheduling Appointment Book

Comments: When booking a PSAC appointment, a new encounter needs to be created.

Work Step [32443]

Description: Cancel/ Reschedule the appointment per Surgeon's Office.

Method: Scheduling Appointment Book

System [32444]

Description: Patient drops off Tracking Board

Swim Lane:

Role(s): Pre op Registration [Custom]

Ward Clerk [Custom]

Department(s):

Security Position(s):

Off Page Reference [32413]

Workflow Link: Registration - ERM - Outpatient Registration Process

Comments: * At the Welland Site, patients are Registered at the PSAC (Not

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Registration)

Work Step [32425]

Description: Assess the presence and validity of the Pre Surgical Documents; documenting on the 'Pre Procedure Documents' PowerForm

Method: PowerForm

Comments: The Ward Clerk will assess the date of the History and Physical and review the Pre Surgical Documents for validity. Pre Surgical Documents include: History and Physical, Procedural/ Blood Consent, planned SURG and ANES orders.

The presence of these documents and interactions to attempt to obtain these items is to be documented on the Pre Surgical Documents PowerForm which can later be pulled into a report.

Decision [32372]

Description: Is patient visit in-person?

Work Step [32276]

Description: Check in the patient and provide documentation to complete (eSign)

Comments: Patient will sign payment agreement, may be provided a paper copy of the Patient Anesthetic Questionnaire to complete as they wait and have their Patient ID bands applied.

Work Step [32275]

Description: Update the Tracking Board to indicate the patient is Arrived

Swim Lane:

Role(s): PSAC Nurse [Custom]

Department(s):

Security Position(s):

Work Step [32388]

Description: Schedule additional PSAC Visit for in-person to complete consultation in appropriate resource

Method: Scheduling Appointment Book

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Work Step [32374]

Description: Open Patient chart from Tracking Board. Access Ad Hoc form folder. Select the Pre Surgical Assessment Clinic PowerForm

Method: PowerForm

Decision [32279]

Description: Will patient see clinician other than the nurse first? (Choosing Wisely Criteria: Anesthesia, Pharmacy, Lab, etc.)

Work Step [32280]

Description: Retrieve patient and take to the appropriate PSAC room

Work Step [32281]

Description: Update Tracking Board with patient location and Visit Status as the patient progresses through their appointment

Comments: Visit Status may be used as a checklist for which pieces of the PSAC appointment have been completed: Waiting Room, Anesthesia Consult, Phlebotomy (Lab), ECG, X-Ray, GIM Consult, PT/OT.

Work Step [32417]

Description: Discharge the encounter from the system.

Work Step [32380]

Description: Communicate concern with anesthesia provider or surgeon

Work Step [32376]

Description: Review chart and verify completion of steps (Surgery Date/Time, H&P, Lab Results, Orders, etc.)

Work Step [32283]

Description: Other clinicians see pt & complete appropriate documentation. Pt goes to appropriate areas as needed (diagnostics, OT/PT/DP)

Work Step [32287]

Description: Open Patient chart from Tracking Board. Access Ad Hoc form folder. Select Pre Surgical Assessment Clinic PowerForm

Method: PowerChart

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Off Page Reference [32418]

Workflow Link: Perioperative - Pre Procedure

Off Page Reference [32415]

Workflow Link: Perioperative - Pre Procedure

Work Step [32379]

Description: Does the patient require a consult to a specialist or additional testing? {Per Choosing Wisely Canada Criteria}

Work Step [32378]

Description: Review patient's Anesthetic Patient Questionnaire and remaining segments of the PowerForm

Work Step [32289]

Description: Review chart and complete the Powerform Segments (Surgery Date/Time, H&P, Lab Results, Orders, etc.)

Method: PowerChart

Work Step [32291]

Description: Review/complete the Anesthetic Patient Questionnaire within Pre Surgical Assessment Clinic Powerform and Sign

Off Page Reference [32439]

Workflow Link: Perioperative - Pre Procedure

Work Step [32293]

Description: Communicate concern with anesthesia provider or surgeon

Decision [32460]

Description: Does Patient require consult to specialist or additional testing? (Choosing Wisely Canada Criteria)

Decision [32456]

Description: Did the patient complete all of their Pre Surgical Assessment Clinic Activities/ Consults?

Comments: This Decision Workstep is targeting the Pre Surgical Assessment activities requested by the Surgeons Office.

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Work Step [32468]

Description: Ensure PSAC orders are complete and discontinued the PSAC phase of the PowerPlan

Method: PowerOrders

Work Step [32438]

Description: Discharge the encounter from the system.

Swim Lane:

Role(s): Surgeon's Office [Custom]

Department(s):

Security Position(s):

Work Step [32436]

Description: Communicate with Anesthesia/ GIM if appropriate. Then, reach out to the Surgical Scheduler to Cancel/ Reschedule the case.

Swim Lane:

Role(s): Anesthesia
Consulting Physician [Custom]

Department(s):

Security Position(s): Physician - Anesthesiology

Work Step [32316]

Description: Complete assessment/ Review of Systems and discuss any concerns with patient

Work Step [32430]

Description: (Anesthesia): Place an ANES- Pre Procedure PowerPlan in a Planned State for the day of Surgery

Comments: This can be modified on the day of Surgery by the Anesthetist assigned to that case.

Work Step [32433]

Description: Communicate with the Surgeon Office: Patient is NOT cleared for Surgery

Work Step [32318]

Description: Chart consult note specific to type of consult

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Decision [29484]

Description: Is the patient cleared for Surgery?

Decision [29485]

Description: Any possible interventions?

Decision [32404]

Description: Is the patient cleared for Surgery?

Work Step [29488]

Description: Order appropriate consultations and additional diagnostics

Comments: Depending on when these can occur, it may require a separate visit, and possibly postponing the procedure.

Work Step [32402]

Description: Review results and chart consult note

Swim Lane:

Role(s): Case Manager
 Occupational Therapist
 Physiotherapist [Custom]

Department(s):

Security Position(s):

Work Step [32365]

Description: Bundled care pathway (PT/OT Education)

Comments: PT OT is classroom based - may evolve into virtual

Facilities:

Facility Name: Niagara Falls Site

Status: Approved

Facility Cerner Owner: Kearns,Caitlin M

Facility Client Owner: Boichuk (Doan), Kristen Rachel

Authorize Date: Mar 08, 2024

Facility Comments:

Facility Name: St. Catharines

Status: Approved

Facility Cerner Owner: Kearns,Caitlin M

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