Future State: Perioperative - Schedule Elective Appointment (Novari)

Cerner Workflow ID: 495 (v. 9.0) Client Workflow ID: 959 Last updated by Anjanette Balboa, Mar 11, 2025 11:53am (UTC -4 hours) Off Page Reference Check the Case Details Screen to see if By 2 weeks Pre Procedure: Use MRN Do you want to admit the patient No Enter PAO - Admit to Day Surgery and Decision to treat patient with a Perioperative - Schedule Emergency Surgical or Endoscopy Procedure the Encounter has been created to locate the encounter and leave postoperatively on the day of surgery? a planned phased SURG PowerPlan orders in a planned state [42740] [42594] Appointment - Main OR [10030] Work Step
PowerChart

Decision

Off Page Reference Off Page Reference Is this an elective procedure?

NO

ENDO

Perioperative - Schedule Emergency Enter PAO- Admit to Inpatient and a planned phased SURG PowerPlan

Does this patient require medications to be held?

Phys Track- Medication Process - Medication Hold Appointment - ENDO [42597] Off Page Reference Off Page Reference → Women and Babies - C-Section Scheduling Phys Track - Perioperative - Surgeon/ Proceduralist: Day of Procedure Add case into Novari ATC within 48 From Provider Office Dashboard: Add Are there any missing mandatory From 'Add Registered Patient' tab, Are there any missing mandatory From Provider Office Dashboard: Add Solve the Care Venue Are there any missing mandatory From 'Add Registered Patient' tab, Are Pre Operative Activities (consults of Novari ATC within 48 Are Pre Operative ACT within 48 Are Pre Operative Activities (consults of Novari ATC within 48 Are Pre Operative ACT within 48 Are Pre Opera hours of decision to treat for Surgical patient to waitlist by selecting 'List' > Search patient by HCN, MRN or Name "Add Patient Form" and select Information or additional fields as for PSAC Clinic) required/ indicated? available (i.e. Consent, History and attachments associated with the From Provider Office Dashboard: Add From 'Add Unregistered Patient' tab, An MRN prefixed with 'P' for 'Pending' Add any additional required Pre System Novari ATC

Decision

Off Page Reference Work Step Scheduling Appointment Book Monitor Care Venue Surgical Schedule Select "SC PAEDS" This allows the SCS 4th Floor PAEDS Novari receives scheduling message Does the patient have a PSS/PSAC Perioperative - Pre Surgical [16667] Day Surgery Department to have generate a Paediatric OR Schedule [42715] Day Surgery Department to have Create patient in Add/Modify person which updates physician booking visit?

Assessment Clinic (Novari) office list [42528] [42550] conversation Work Step After creating the encounter in Perioperative - Pre Procedure procedure at the St. Catharines Site?

[42711] Is this a paediatric patient having their procedure at the St. Catharines Site?

[42711] Is a PSS/PSAC visit required?

Format questions appropriately, if needed.

[42873] Is a PSS/PSAC visit required?

PSAC Required field defaults to 'No'

Novari ATC as appropriate

[42879] Is a PSS/PSAC visit required?

PSAC Required field defaults to 'No'

Novari ATC as appropriate

[42899] Millennium, Link the Encounter number in ATC to case Manually match patient in Novari for system to update.

[42750] ¥ Decision Work Step Off Page Reference On the Details tab, confirm that the Does this patient require admission Ves Is this patient currently admitted to Ves Registration - ERM - Pre-Admit PSAC Required field is set to 'Yes' [42457] [42694] [42602] System
Scheduling Appointment Book Triggers population of PSAC Request Use current inpatient encounter List (on Confirmed Procedure unless patient is coming from appointment) Complex Care or the Extended Care [26673] Unit (ECU) [42464]

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Future State: Perioperative - Schedule Elective Appointment (Novari)

Cerner Workflow ID: 495 (v. 9.0) Client Workflow ID: 959

Last updated by Anjanette Balboa, Mar 11, 2025 11:53am (UTC -4 hours)

Workflow Details:

Workflow Name: Perioperative - Schedule Elective Appointment (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:

Related Solution(s): Surgical Management

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

TestBuilder Script(s):

Cerner Workflow ID: 495 (v. 9.0)

Client Workflow ID: 959

Workflow Notes: This workflow outlines the steps involved in requesting and

scheduling a surgical or endoscopic procedure, utilizing Orders to

Scheduling for elective cases.

Introduced By: WS 1 Validated By: WS 2

Swim Lane:

Role(s): Surgeon

Proceduralist

Department(s): Security Position(s):

Start/Stop [16650]

Description: Decision to treat patient with a Surgical or Endoscopy Procedure

Off Page Reference [42620]

Workflow Link: Perioperative - Schedule Emergency Appointment - Main OR

Work Step [42740]

Description: Check the Case Details Screen to see if the Encounter has been created

Method: Novari ATC

Comments: *Follow up with providers*



Future State: Perioperative - Schedule Elective Appointment (Novari)

Cerner Workflow ID: 495 (v. 9.0) Client Workflow ID: 959

Last updated by Anjanette Balboa, Mar 11, 2025 11:53am (UTC -4 hours)

Mar 14, 2025

Work Step [42362]

Description: By 2 weeks Pre Procedure: Use MRN to locate the encounter and leave orders in a

planned state

Method: PowerChart

Decision [42594]

Description: Do you want to admit the patient postoperatively on the day of surgery?

Comments: Orders will be placed on the chart directly within Millennium by the

Surgeon after the encounter is created.

Work Step [42596]

Description: Enter PAO - Admit to Day Surgery and a planned phased SURG PowerPlan

Method: PowerChart

Decision [42412]

Description: Is this an elective procedure?

Off Page Reference [42689]

Workflow Link: Perioperative - Schedule Emergency Appointment - ENDO

Work Step [42597]

Description: Enter PAO- Admit to Inpatient and a planned phased SURG PowerPlan

Method: PowerChart

Comments: Keep all analgesia, antiemetics and sedatives within a unique sub-

phase in case these orders conflict with Anesthesia Power Plans.

This will allow Nursing to activate your SURG phase containing analgesia,

antiemetic and sedative medication orders after eg.

an epidural is discontinued along with the ANES medication orders

that accompanied it.

Decision [42703]

Description: Does this patient require medications to be held?

Off Page Reference [42706]

Workflow Link: Phys Track- Medication Process - Medication Hold



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Work Step [42722]

Description: Determine most appropriate Surgical Location for Procedure based on patient

assessment findings.

Comments: For Example, patients with multiple comorbidities or an ASA >3

may be scheduled into the Main OR instead of the APU Gyne Clinic.

Surgical locations can be changed easily within the Novari ATC application if

required prior to being submitted to the Care

Venue.

Off Page Reference [42752]

Workflow Link: Women and Babies - C-Section Scheduling

Off Page Reference [42600]

Workflow Link: Phys Track - Perioperative - Surgeon/ Proceduralist: Day of Procedure

Swim Lane:

Role(s): External Office Staff/Surgeon/Proceduralist [Custom]

Department(s):

Security Position(s):

Work Step [42623]

Description: Add case into Novari ATC within 48 hours of decision to treat for Surgical Cases.

Method: Novari ATC

Work Step [42649]

Description: From Provider Office Dashboard: Add patient to waitlist by selecting 'List' > 'Add

Patient'

Method: Novari ATC

Work Step [42651]

Description: From 'Add Registered Patient' tab, Search patient by HCN, MRN or Name + DOB

Method: Novari ATC

Decision [42724]

Description: Did you locate the correct patient?



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Work Step [42660]

Description: Complete the required fields in the "Add Patient Form" and select "Submit"

Method: Novari ATC

Comments: Fields may include: Provider, Service, Diagnosis Description,

Diagnosis Category (i.e. Malignant), Procedure, Procedure Notes (i. e. special equipment), est. provider time, body site, responsibility

for payment, referral type, referring provider, referral date, decision to treat date, wait priorities (Cancer Care Ontario), short notice appointment interest, Patient Alert/ Allergy (i.e. MH, Latex), medications, comorbidities, patient concerns and notes,

etc.

Work Step [42667]

Description: Complete Scheduling/ Case Information or additional fields as prompted

Method: Novari ATC

Decision [42734]

Description: Are Pre Operative Activities (consults for PSAC Clinic) required/ indicated?

Work Step [42625]

Description: Add attachments to the case as they available (i.e. Consent, History and Physical

etc.)

Method: Novari ATC

Comments: Procedure Consent, Blood Consent, Anesthetic Questionnaire, History

and Physical etc.

Documents can be scanned or uploaded after which the user can assign the

document type to tell

the system if its a consent, history and physical etc.

Decision [42641]

Description: Are there any missing mandatory attachments associated with the booking?

Method: Novari ATC

Work Step [42634]

Description: Navigate to 'Calendar' and place the patient on the Surgical Block

Method: Novari ATC

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Future State: Perioperative - Schedule Elective Appointment (Novari)

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Work Step [42647]

Description: Click "Submit Block to Care Venue Module" to complete the booking

Method: Novari ATC

System [42673]

Description: Booking request will populate the Care Venue Surgical Schedule

Method: Novari ATC

Work Step [42656]

Description: From Provider Office Dashboard: Add patient to waitlist by selecting 'List'> 'Add

Patient'

Method: Novari ATC

Work Step [42658]

Description: From 'Add Unregistered Patient' tab, enter required fields

Method: Novari ATC

Comments: Required fields include demographic data; Address, Contact

information, Sex, Primary Care Provider etc.

System [42730]

Description: An MRN prefixed with 'P' for 'Pending' will be generated

Method: Novari ATC

Work Step [42670]

Description: Add any additional required Pre Operative Activities (Consults for PSAC Clinc)

Method: Novari ATC

Comments: Visits: Nursing Consults, Anesthesia Consults in the PSAC Clinic

Swim Lane:

Role(s): Surgical Scheduler [Custom]

Endoscopy Scheduler [Custom]

APU Scheduler [Custom]

Womens and Babies Scheduler [Custom]

Department(s):

Security Position(s): Perioperative - Scheduler

Work Step [16667]

Description: Monitor Care Venue Surgical Schedule



Future State: Perioperative - Schedule Elective Appointment (Novari)

Cerner Workflow ID: 495 (v. 9.0) Client Workflow ID: 959

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Method: Novari ATC

Work Step [42713]

Description: Select "SC PAEDS"

Method: Scheduling Appointment Book

Comments: Ortho cases ages 14-16 can go through regular day surgery department

System [42715]

Description: This allows the SCS 4th Floor PAEDS Day Surgery Department to have generate a

Paediatric OR Schedule

System [42528]

Description: Novari receives scheduling message which updates physician booking office list

Method: Novari ATC

Decision [42550]

Description: Does the patient have a PSS/PSAC visit?

Off Page Reference [42551]

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

Work Step [42748]

Description: Create patient in Add/Modify person conversation

Method: Scheduling Appointment Book

Work Step [25829]

Description: Begin completing Request

Method: Scheduling Appointment Book

Decision [42711]

Description: Is this a paediatric patient having their procedure at the St. Catharines Site?

Work Step [42373]

Description: Update Order Entry and Accept Format questions appropriately, if needed.

Method: Scheduling Appointment Book

Comments: If the providers office added special equipment to the case,

scheduler staff must free text the additional information under the

Procedure Notes field within the OEF window



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Decision [26670]

Description: Is a PSS/PSAC Visit required?

Method: Scheduling Appointment Book

Work Step [26672]

Description: On the Details tab, confirm that the PSAC Required field defaults to 'No'

Method: Scheduling Appointment Book

Work Step [42610]

Description: Review and verify procedure and order entry fields interfaced from Novari ATC as

appropriate

Method: Scheduling Appointment Book

Work Step [16733]

Description: Book appointment into appropriate block

Method: Scheduling Appointment Book

Work Step [16758]

Description: Confirm appointment

Method: Scheduling Appointment Book

Decision [42399]

Description: Is this a Same Day Surgery Case?

Comments: i.e. Will they be discharged on the same day as their surgical

procedure?

These patient will not get an inpatient bed assignment.

Work Step [16804]

Description: Create PreReg encounter

Comments: If currently admitted to site A and going to site B for procedure

but not being admitted to Site A.

Off Page Reference [42400]

Workflow Link: Registration - ERM - PreRegistration Process



Future State: Perioperative - Schedule Elective Appointment (Novari)

Cerner Workflow ID: 495 (v. 9.0) Client Workflow ID: 959

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Work Step [42742]

Description: After creating the encounter in Millennium, Link the Encounter number in ATC to

case

Method: Novari ATC

Off Page Reference [42746]

Workflow Link: Perioperative - Pre Procedure

Work Step [42750]

Description: Manually match patient in Novari for system to update.

Work Step [26671]

Description: On the Details tab, confirm that the PSAC Required field is set to 'Yes'

Method: Scheduling Appointment Book

Decision [42457]

Description: Does this patient require admission after their Procedure?

Decision [42694]

Description: Is this patient currently admitted to the hospital?

Work Step [42402]

Description: Create PreReg encounter

Comments: If utilizing the Surgery Request MPage component, this may have

already been created, depending on the local configuration. This may require a modification to the encounter type for a Same-Day

Admit patient.

Off Page Reference [42617]

Workflow Link: Registration - ERM - Pre-Admit Process

System [26673]

Description: Triggers population of PSAC Request List (on Confirmed Procedure appointment)

Method: Scheduling Appointment Book

Work Step [42464]

Description: Use current inpatient encounter unless patient is coming from Complex Care or

the Extended Care Unit (ECU)

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Comments: If a request was generated from the active Inpatient encounter, then the scheduler would just need to verify that it is already associated appropriately.

