# SURGEON AND PROCEDURALIST CHECKLIST

HOSPITAL INFORMATION SYSTEM (HIS)

## SURGEONS AND PROCEDURALISTS

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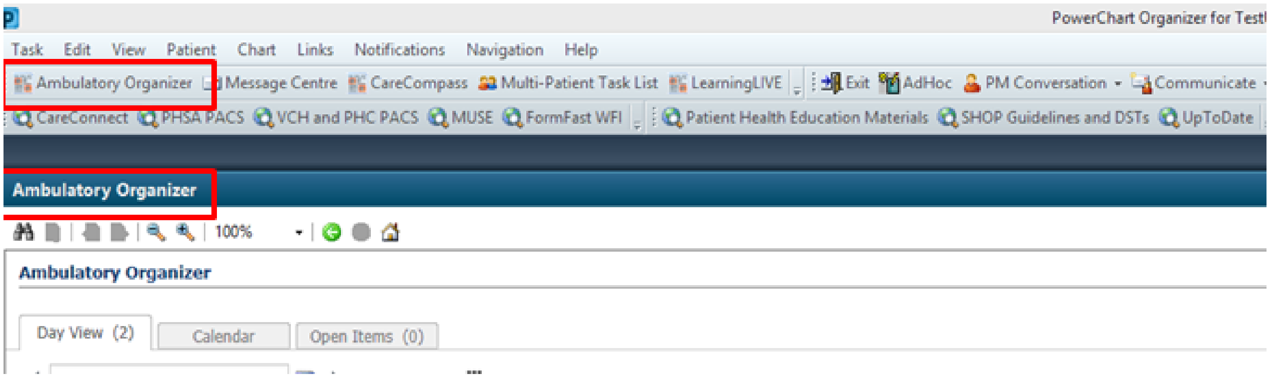
## SETTING UP AMBULATORY ORGANIZER

The **Ambulatory Organizer** provides a summary of the scheduled appointments for a selected resource or group of resources. The view includes appointment times, patient information, appointment indicators and visual cues notifying you of pertinent changes to the patient status.

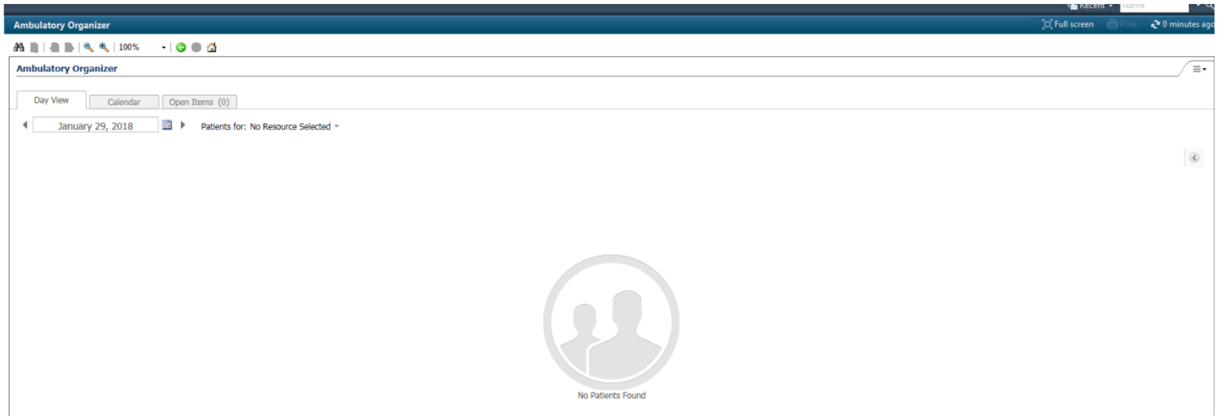
When you log into the **PowerChart** application, it lands on the **Ambulatory Organizer** window. Alternatively, you can click on the **Ambulatory Organizer** icon in the toolbar to open this window.

Appointments can be viewed in list format under the **Day View** tab or in scheduling grid format under the **Calendar** tab.

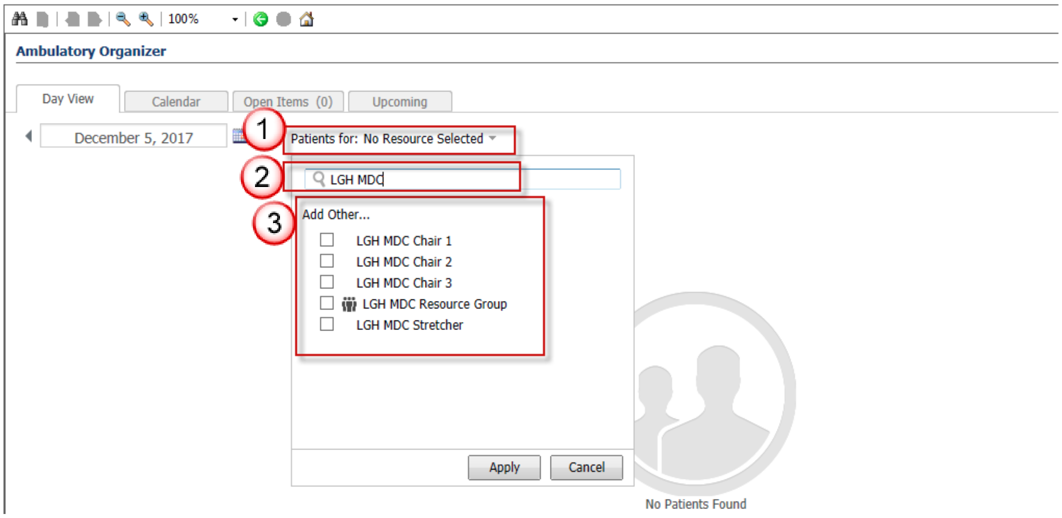



### Set up Ambulatory Organizer

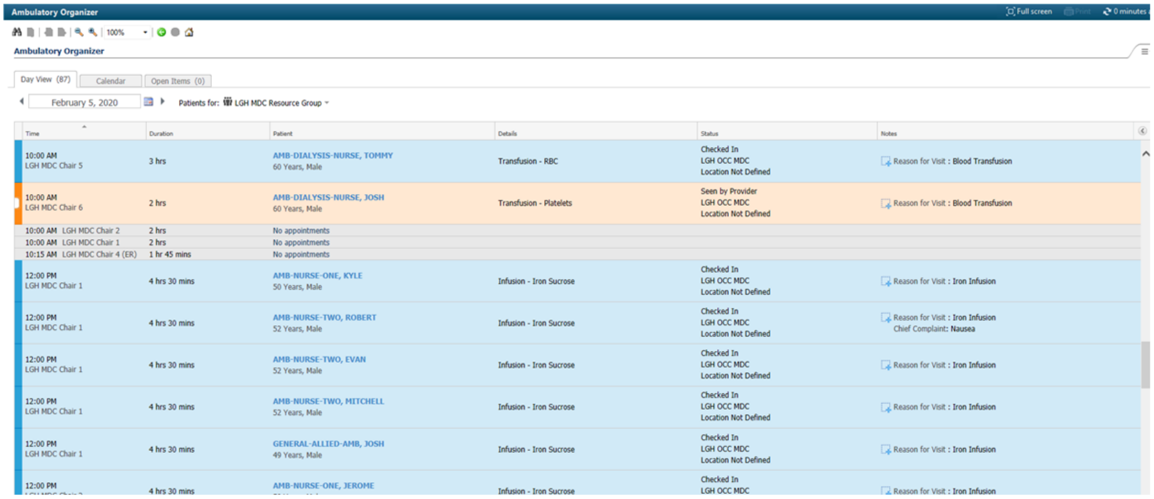
The first time you open **Ambulatory Organizer** it will be blank. You must follow the steps below to specify which Resource(s) you would like to view appointments for.



1. Select the **Patients For** by clicking on the drop-down arrow. Patients for: No Resource Selected
2. Type the name of the Resource(s) or Resource Group(s) in the search window you would like to view appointments for (i.e. NH Peds Asthma Resource Group).
3. Select the **checkbox** in front of the appropriate Resource(s).




4. Click the **Apply** button. A list of appointments for the selected Resource/Resource Group will appear.
   **NOTE**: After initial setup of the Resources, the settings will be saved to your account. You must manually change the Resources in the **Patients for**: drop-down if you would like to view different appointments. When you choose a resource in Day View it won't change the resource in Calendar view.

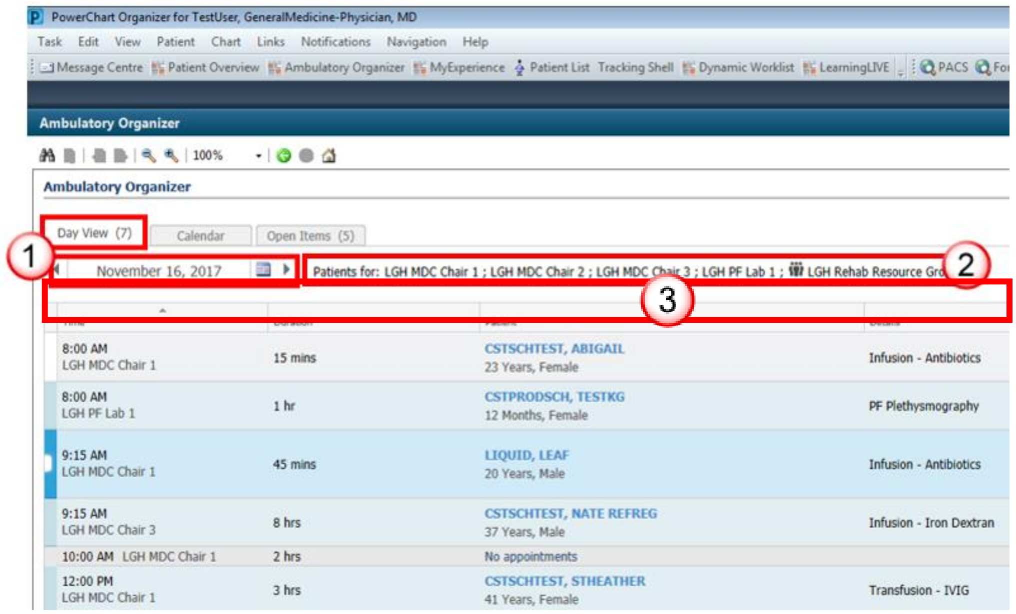


## Ambulatory Organizer

The **Ambulatory Organizer** provides a simple but comprehensive display of scheduled appointments for providers. It provides a snapshot of the current day's appointments, including appointment gaps, appointment times and details, patient information and status, outstanding items to be completed at each visit, and reminders.

The **Ambulatory Organizer** provides ambulatory physicians and support staff with a framework to organize workflows at the day, week, or month level; to manage items that need to be completed with each visit; and to view previous visit items that were not completed for the visit.

## Day View

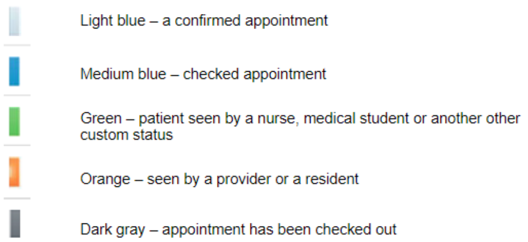



1. The first tab is the **Day View** tab. This tab displays the appointments for the selected resources for that particular day. You can select a different date by using the Calendar icon.
2. **Day View** heading indicates your name and what facilities are included in your appointment list for the date. You can use this to filter your appointments to a particular facility.

   **NOTE**: Multiple resources can be selected in **Day View**. Physicians will see their names as resources.

3. You can also sort the appointment list by selecting one of the following column headings: Time, Patient, or Status.

   **NOTE**: The colour status on the left side of the **Day View** and on the **Calendar** view assists you to understand the flow of the clinic. Your site might be using different colour scheme assigned to the appointment status.

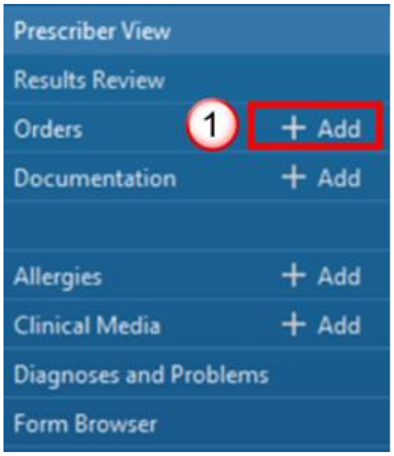


## POWERPLANS AND ORDER OPTIMIZATION

**Note: In order to Save Favorites for an Inpatient, you will need to be in an Inpatient Encounter, and in order to Save Favorites for an Outpatient, you will need to be an Outpatient Encounter.**

### Favouriting

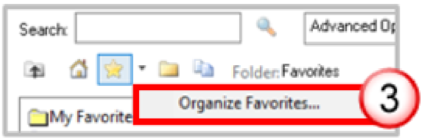
A **Favorites** folder for ordering allows you to put together a portfolio of your commonly ordered items. This **Favorites** folder can also be added to the Quick Orders workflow tab to personalize your preferences.

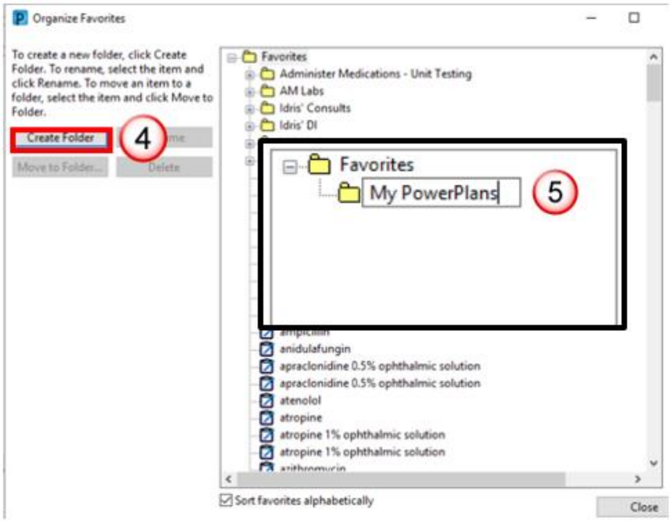



1. Click the **+ Add** button beside Orders on the dark blue Table of Contents menu.

NOTE: Before proceeding to the next step, select the appropriate **Order Catalogue Type**. The chosen **Order Catalogue Type** will impact what encounter the folder will be available on and the types of orders that can be added to it.


2. Click the drop-down arrow next to the **star** within the **Add Orders** dialogue window.
3. Select **Organize Favorites**.



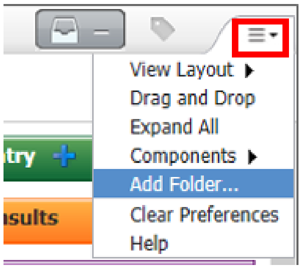




4. Click **Create Folder**
5. Type the name of your new Favorites Folder and press **Enter** on your keyboard.
6. To create another folder, make sure to select the folder where you want the new folder. The root here is **Favorites.** Click **Create Folder** to add more.
7. Click **Close** when done.

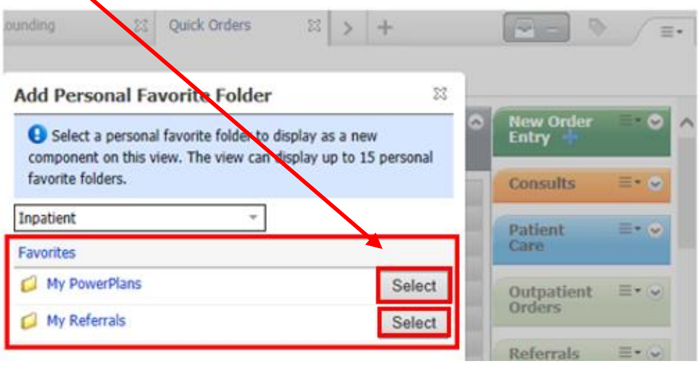
## Add Your Favourites Folder to the Quick Orders Tab

**REMEMBER**: You must first **Create a Favorites Folder**. Only the orders that you add to your favourites folder will be displayed in the folder.

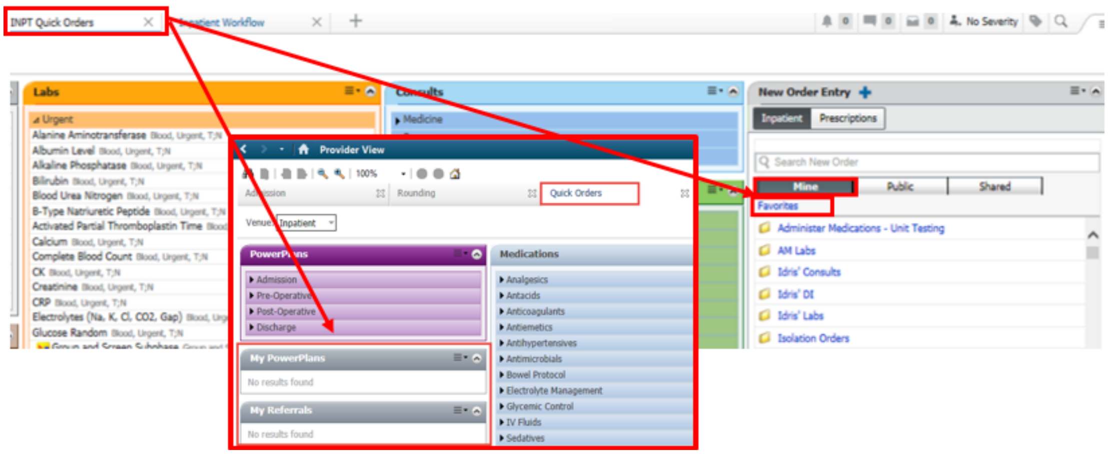
A **Favorites** folder can also be added to the **Quick Orders** workflow tab to further personalize your preferences.




1. Navigate to **Quick Orders** tab. In the top right corner, click on the 3 bars with drop-down ☰▾ and choose **Add Folder**.
   The **Add Personal Favorite Folder** window opens. Any personal folder(s) you created on the Orders page displays in the **Add Personal Favourite Folder** window.
2. Find the folder you wish to add and click **Select**.
3. Click the **Refresh** button .
4. Your **Favorite Folders** appear on your Quick Orders page.



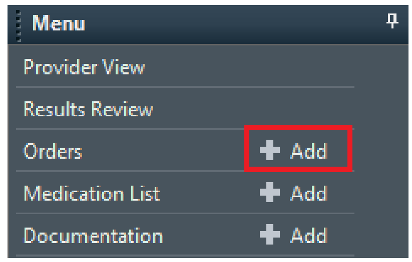

**NOTE**: This will add your folder to the Quick Orders tabs, and you will be able to access its contents within the workflow tabs page.



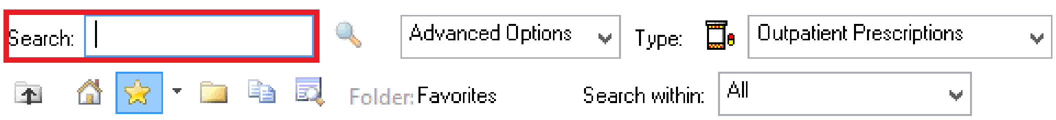
## Add Orders to Your Favourites Folder

A **Favorites** folder for ordering allows you to put together a portfolio of your commonly ordered items. You must first have created a **Favorites** Folder. This **Favorites** folder can also be added to the workflow tab under the provider view in the Quick Orders tab to further personalize the Quick Orders workflow tab to your preferences.

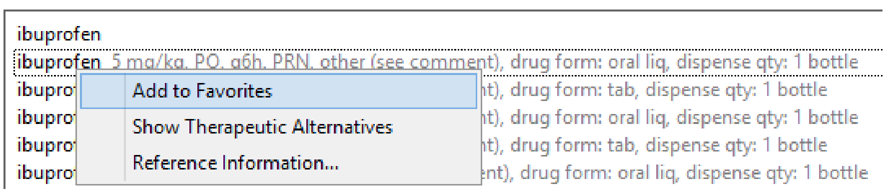
1. Click the **Add** button beside **Orders** on the **Menu**.



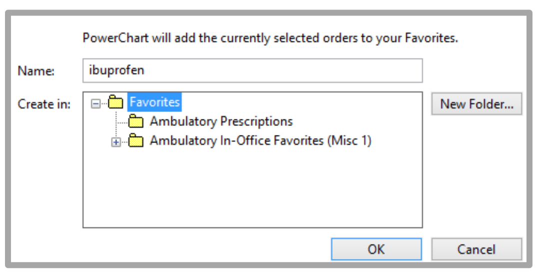

2. In the Search Bar, type the name of the order or medication you would like to add and press Enter on your keyboard.




3. In the Search results, right-click the order that you would like to add and select **Add to Favorites.**

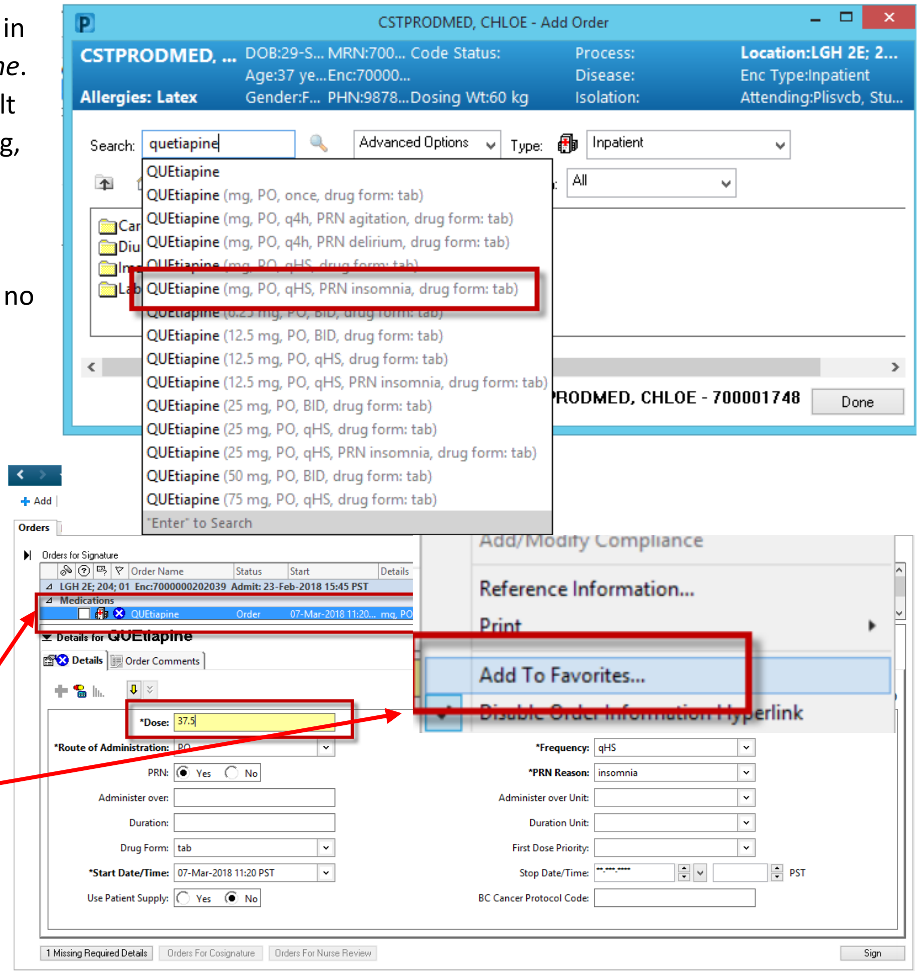



4. Select the folder you wish to add the order to in the **Add Favorites** window.
5. Click **OK**.

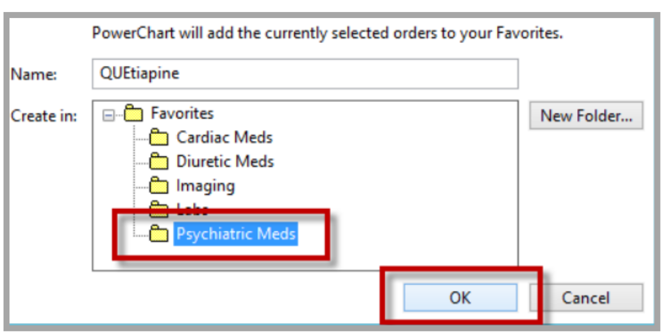


Add Medications with user-defined details to your Favorites Folder

1. While in the **Add Order** screen in the **Search** field, type *quetiapine*.
2. You will see there is no pre-built sentence for Queiapine 37.5 mg, PO,qHS, PRN insomnia.
3. Select the generic sentence quetiapine (mg, PO,aHS, PRN insomnia, drug form: tab) with no dosage.
4. Click the **Done** button at the bottom right-hand corner.
5. In the **Order** tab, ensure the medication is selected. The **Details** tab for the Quetiapine order will appear at the bottom of the screen.
6. In the required ***Dose**: field, type *37.5*
7. To save this medication as a favourite, right-click on the medication and select **Add To Favorites**.

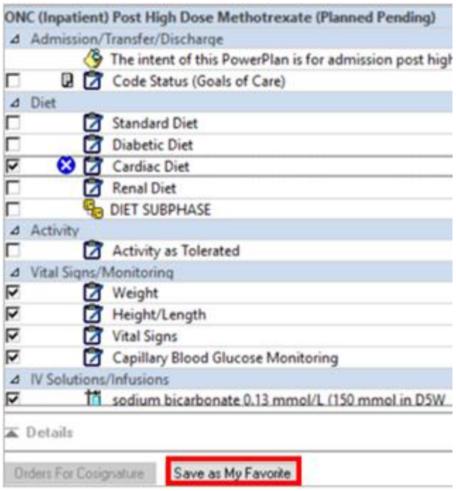



8. In the **Add Favorite** screen, select an existing folder and click **OK**.
   The newly favourited medication will now be available in the folder.



### Add PowerPlans to Your Favourites Folder

When creating a favourite plan, you can pre-select or deselect orders and add additional orders not included in the PowerPlan.




Reasons to consider creating a PowerPlan favourite:

- Repetitive orders
- Common Procedures
- Common Diagnoses
- Common Reasons for Admission

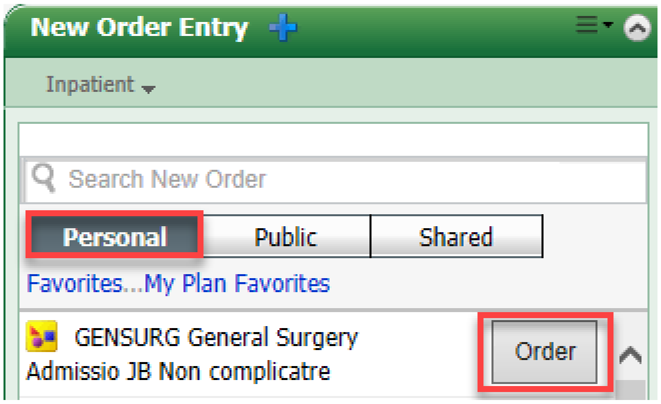
Follow the process **Add Orders to Your Favourites Folder** above **or** click **Save as My Favorite** button located below the PowerPlan.

**NOTE:** If the PowerPlan button is *dithered* or greyed out, it cannot be saved as a Favourite.

### Modify PowerPlan Favourite

PowerPlan favorites can be edited at any time.

1. Click the **Quick Orders** tab.
2. Click **Personal**.
3. Click the **My Plan Favorites** folder button.
4. Click **Order** next to the PowerPlan you wish to modify.
5. The PowerPlan opens.
6. In the open PowerPlan, make necessary edits.
7. Click **OK**. The **Save as My Favourite** window displays.
8. Click **Yes** to save your modified favourite PowerPlan.

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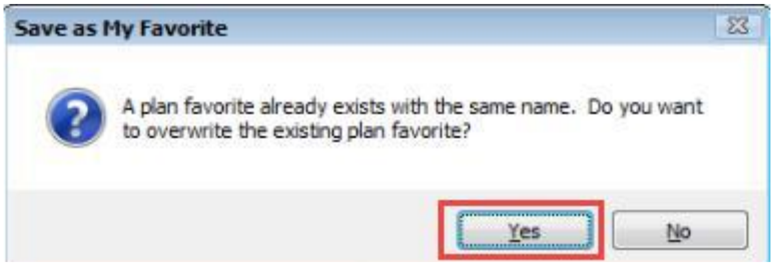
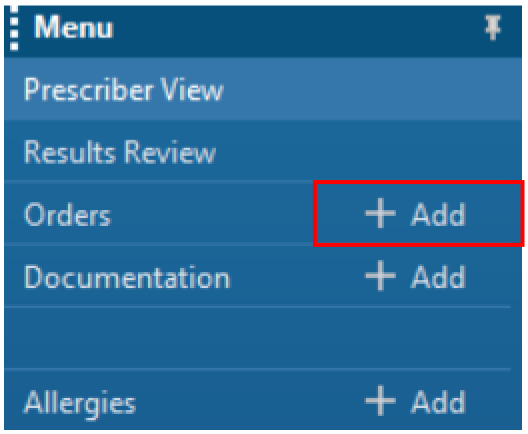


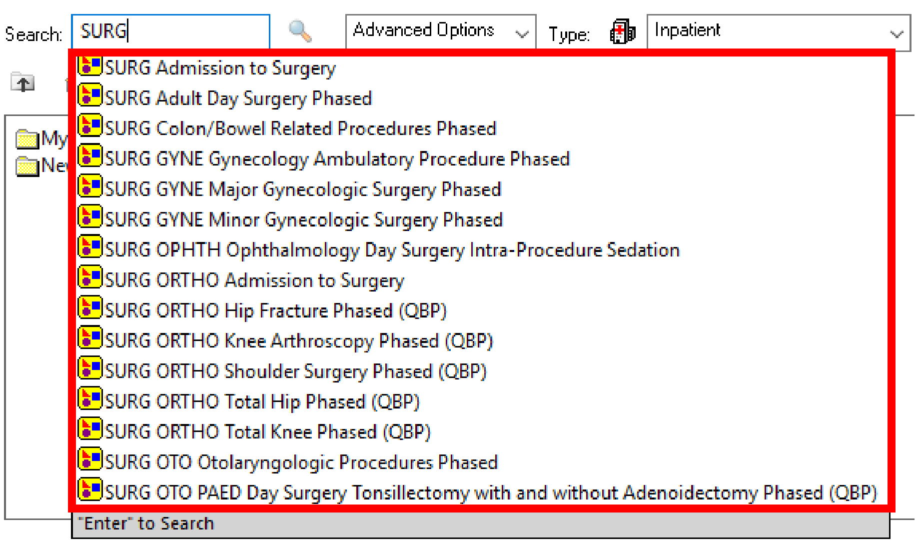
## Planning for Later

Plan for Later functionality allows for placing a PowerPlan in a planned state for future procedures. PowerPlans in a planned state are signed and ready to be initiated by a nurse on the day of surgery.

1. Navigate to Table of Contents (Blue Menu) and select + Add next to orders.



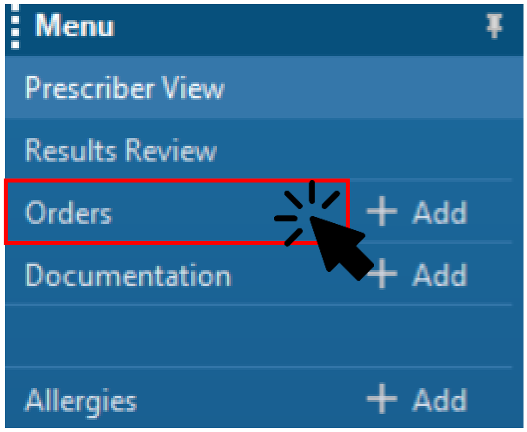

2. The Add Order dialogue box opens. In the search bar type in SURG/ "Pathology" and select the appropriate PowerPlans to view. Then select Done.



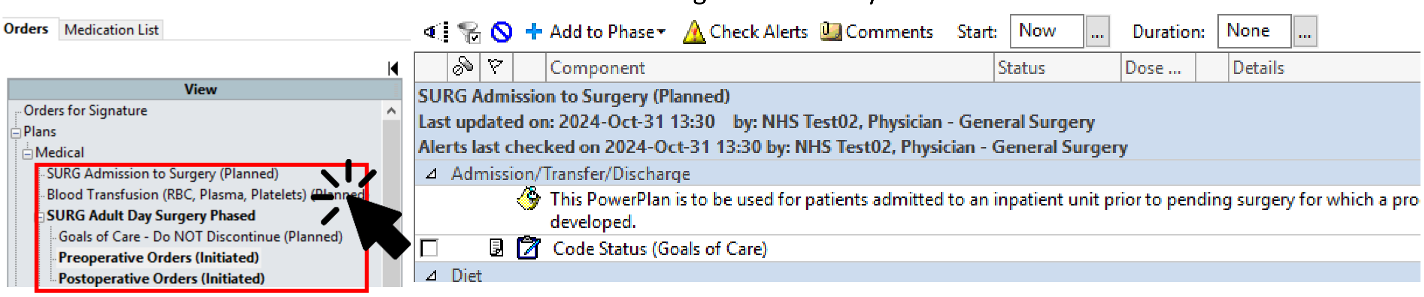

3. Fill in the details of the admission and phased surgery PowerPlans.
4. Select Plan for Later to place the PowerPlan in a planned state and ready for day of procedure.

## Alterations on the Day of Surgery

1. Navigate to Table of Contents (Blue Menu) and select **Orders**.




2. Review ordered PowerPlans and make changes if necessary.

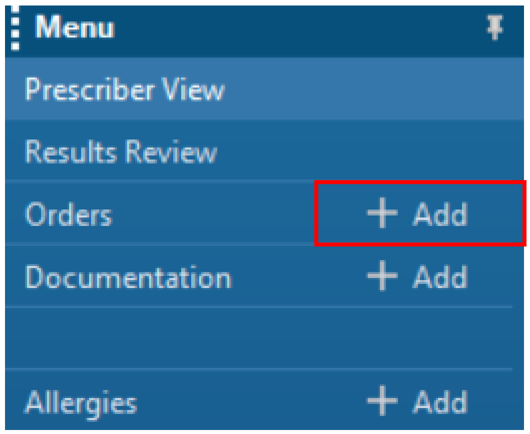



Note: There is no need for prescribers to initiate the PowerPlan at any stage of the procedure. The nurse can initiate the PowerPlans and each applicable phase as you go through each phase of procedure.

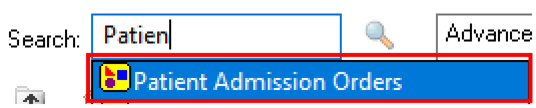
## HOW: PAOS ON SURGERY

### Admission from ER to Inpatient

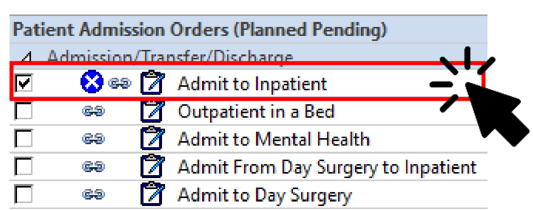
1. An ED physician has put in a “Consult to General Surgery” order and it has been determined that the patient is to be admitted to inpatient.
2. Navigate to Table of Contents (Blue Menu) and select + Add next to orders.



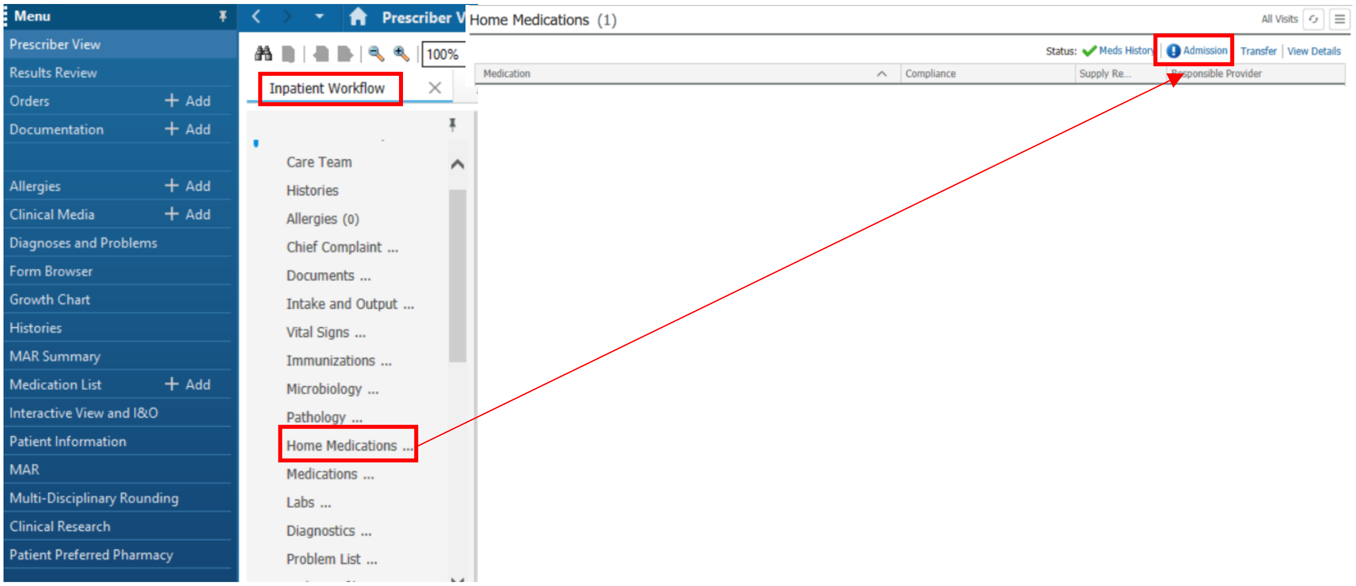

3. The Add Order dialogue box opens. In the search bar type in “Patient Admission Orders” and select Patient Admission Orders to view. Then select Done.




4. Select The Add Order dialogue box opens. In the search bar type in ‘patient admission orders’ and ‘SURG’ separately. Select the appropriate admission and phased surgery PowerPlans to view. Then select Done.
5. Plan "Admit to Inpatient" order in the "Patient Admission Orders" PowerPlan.

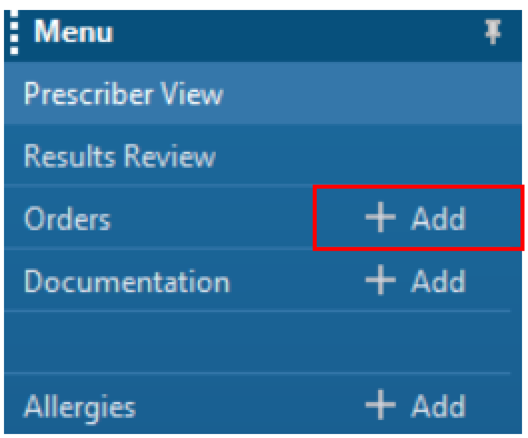


6. From the **Inpatient Workflow MPage**, navigate to the **Home Medications** component and click **Admission**.

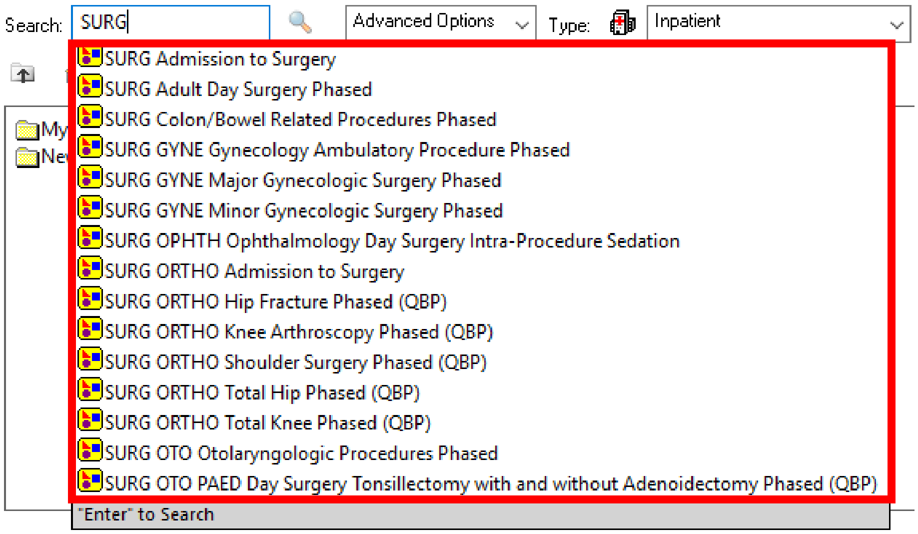



7. Review the medications, and select which to continue, discontinue, or add based on clinical judgement.

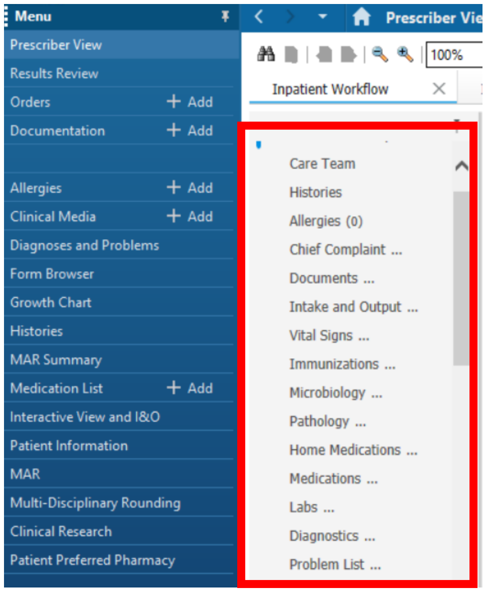
8. Navigate back to Table of Contents (Blue Menu) and select + Add next to orders.




9. The Add Order dialogue box opens. In the search bar type in SURG and select the appropriate admission and phased surgery PowerPlans to view. Then select Done.



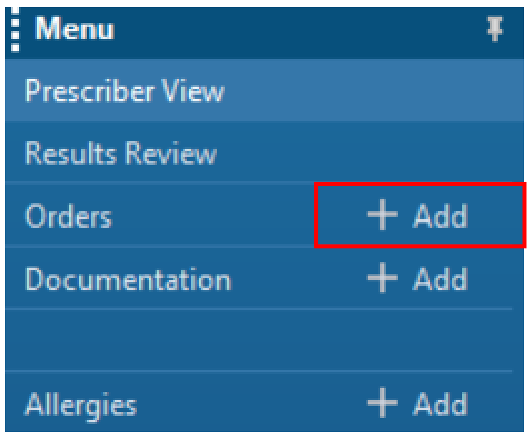

10. Fill in the details of procedure PowerPlans.
11. Select Plan for Later or Initiate Now depending on your needs and sign the PowerPlans.
12. From **Inpatient Workflow MPage**, review/update and complete all other relevant components and documentation of the chart such as Chief Complaint, Histories, Subjective/HPI, ROS, Phys Exam, Assessment and Plan.




13. Complete Consult Note. Refer to the Dynamic Documentation job Aid for more information.

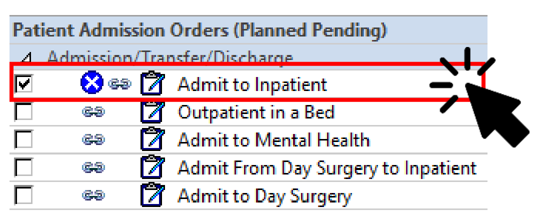
## Admission from Home to Inpatient

1. Patient has clinical indication that they need to be admitted. You as the receiving prescriber will follow the steps below to admit the patient from home to inpatient.
2. Outpatient gives call and completes a verbal handoff.
3. Communicate Decision to Admit with Outpatient Team & inform Inpatient charge nurse/bed monitor to pre-reg patient.
14. When you are notified of pre-admit encounter creation, navigate to Table of Contents (Blue Menu) and select + Add next to orders.

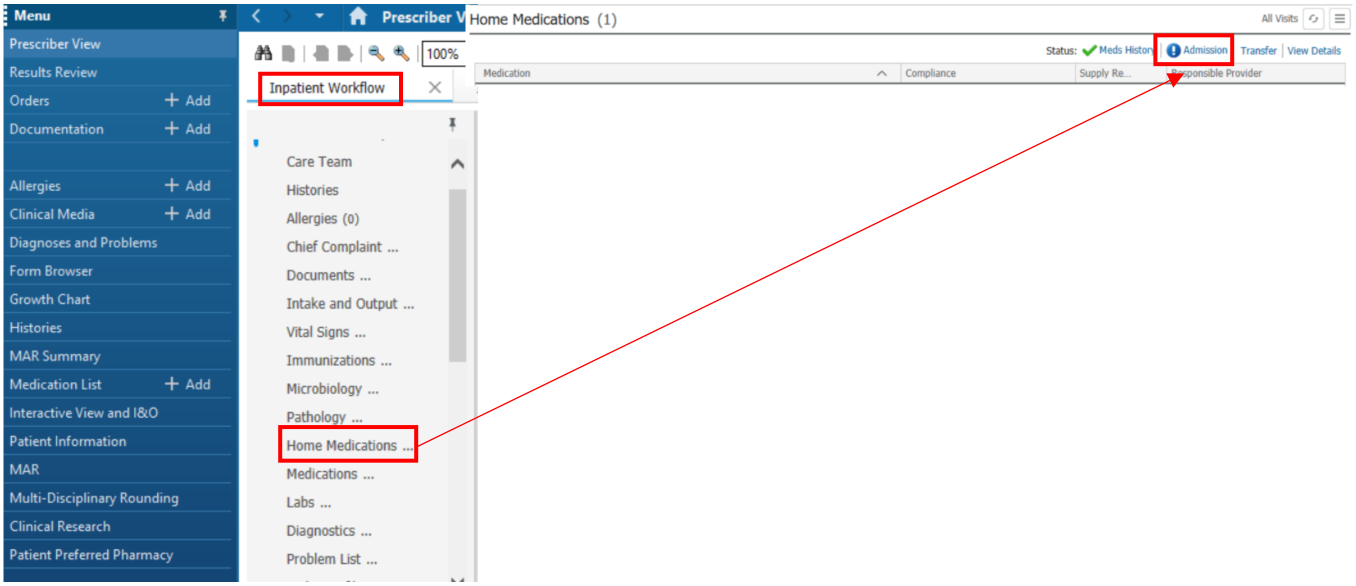



15. The Add Order dialogue box opens. In the search bar type in “Patient Admission Orders” and select Patient Admission Orders to view. Then select Done.

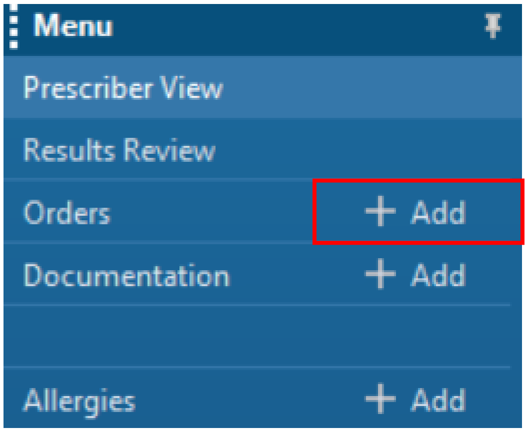

16. Select The Add Order dialogue box opens. In the search bar type in ‘patient admission orders’ and ‘SURG’ separately. Select the appropriate admission and phased surgery PowerPlans to view. Then select Done.
17. Plan "Admit to Inpatient" order in the "Patient Admission Orders" PowerPlan.



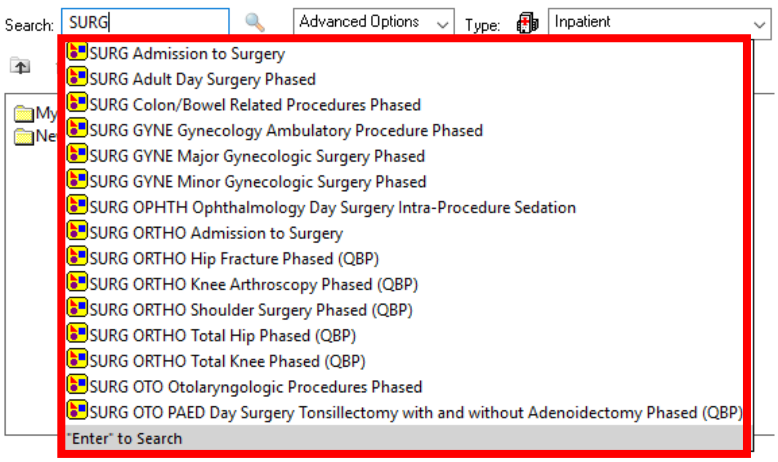
18. From the **Inpatient Workflow MPage**, navigate to the **Home Medications** component and click **Admission**.



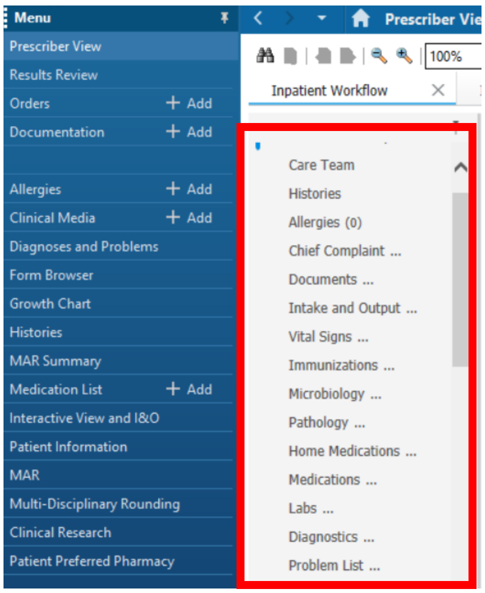

19. Review the medications, and select which to continue, discontinue, or add based on clinical judgement.
20. Navigate back to Table of Contents (Blue Menu) and select + Add next to orders.




21. The Add Order dialogue box opens. In the search bar type in SURG and select the appropriate admission and phased surgery PowerPlans to view. Then select Done .



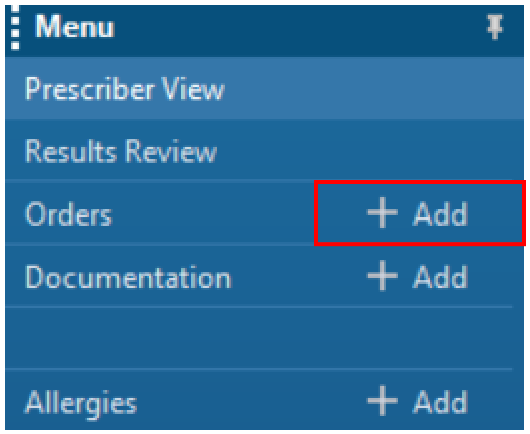

22. Fill in the details of procedure PowerPlans.
23. Select Plan for Later or Initiate Now depending on your needs and sign the PowerPlans.
24. From **Inpatient Workflow MPage**, review/update and complete all other relevant components and documentation of the chart such as Chief Complaint, Histories, Subjective/HPI, ROS, Phys Exam, Assessment and Plan.



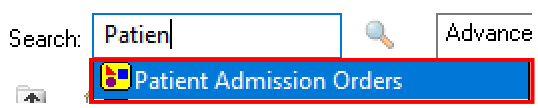

25. Complete Consult Note. Refer to the Dynamic Documentation job Aid for more information.

## Admission from ER to Day Surgery

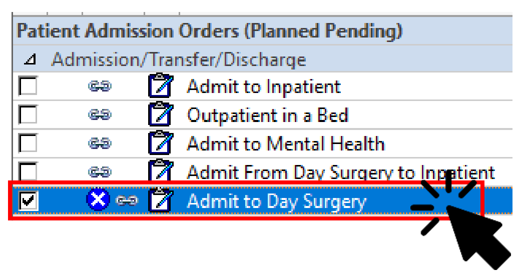
1. An ED physician has put in a “Consult to General Surgery” order and it has been determined that the patient is to be admitted to day surgery.
2. Navigate to Table of Contents (Blue Menu) and select + Add next to orders.




3. The Add Order dialogue box opens. In the search bar type in “Patient Admission Orders” and select Patient Admission Orders to view. Then select Done.

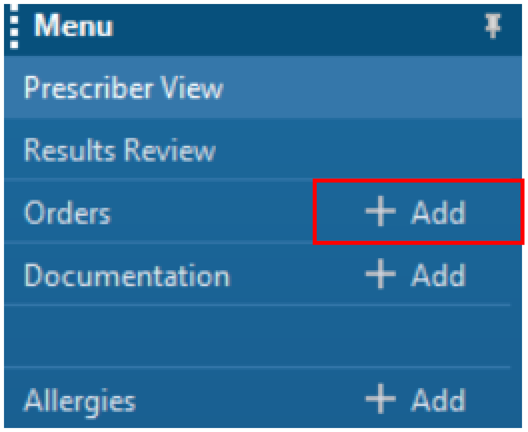



4. Select The Add Order dialogue box opens. In the search bar type in ‘patient admission orders’ and ‘SURG’ separately. Select the appropriate admission and phased surgery PowerPlans to view. Then select Done.
5. Plan "Admit to Day Surgery" order in the "Patient Admission Orders" PowerPlan.
6. Refer to Transfer (Change in Level of Care) All Orders Reconciliation Workflow tip sheet for more information.
7. Complete any relevant documentation.

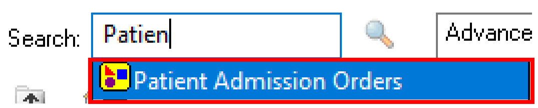


## Admission from Day Surgery to Inpatient

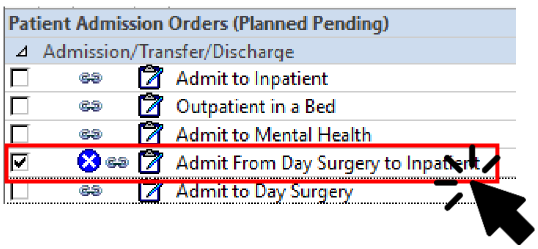
1. After the completion of a same day surgery, it has been determined that the patient is to be admitted to inpatient.
2. Navigate to Table of Contents (Blue Menu) and select + Add next to orders.




3. The Add Order dialogue box opens. In the search bar type in “Patient Admission Orders” and select Patient Admission Orders to view. Then select Done.




4. Select The Add Order dialogue box opens. In the search bar type in ‘patient admission orders’ and ‘SURG’ separately. Select the appropriate admission and phased surgery PowerPlans to view. Then select Done.
5. Plan "Admit to Day Surgery" order in the "Patient Admission Orders" PowerPlan.
6. Refer to Transfer (Change in Level of Care) All Orders Reconciliation Workflow
7. Complete any relevant documentation.




**<u>Note: Add-on urgent cases and elective procedures do not require PAOs</u>**

## BOOKING AN ADD-ON URGENT CASE

### Maintaining Current State

#### Main OR

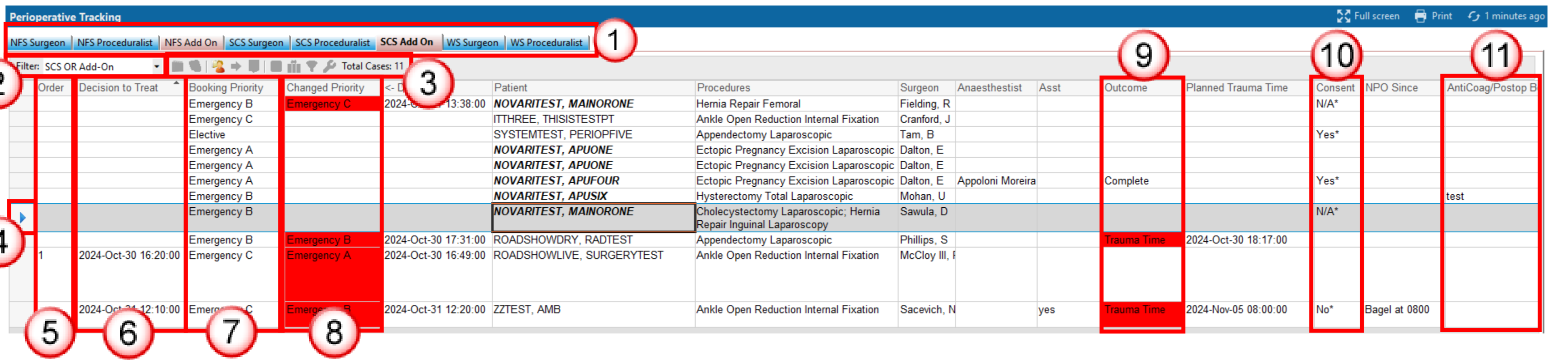
- An “**Emergency A Case**” or “**Emergency B Case**” requires the Surgeon to contact Switchboard to call in the On-Call Staff.
- A more stable “**Emergency B, C or D Case**” that is deemed safe to wait for regular OR hours does not need switchboard to call in the On Call staff. The surgeon can call the OR desk to schedule the case.
- If it’s not after hours: Call the OR to schedule the case into the Add On Room for the site of surgery. The Anesthesia will be made aware if they are required for the case if urgent.
- If it’s after hours: The surgeon can write down the case details at the OR Desk for entry in the AM (paper process).

#### ENDO

- Surgeon notifies the Endoscopy unit and the Endo scheduler will schedule the case. If the Endo scheduler is not available, they call registration to add the case to the Urgent List. The register captures case details (paper process) to relay to surgical scheduler in the morning. The Endo scheduler then schedules the case once they come in the AM. If after hours (endo scheduler gone for the day), they call the switchboard to call in on call Endo Staff if being done in ED/ICU.
- Once the urgent case is scheduled, the cases will fall into the Perioperative Tracking board under NFS Add On, SCS Add On

## PERIOPERATIVE TRACKING BOARD

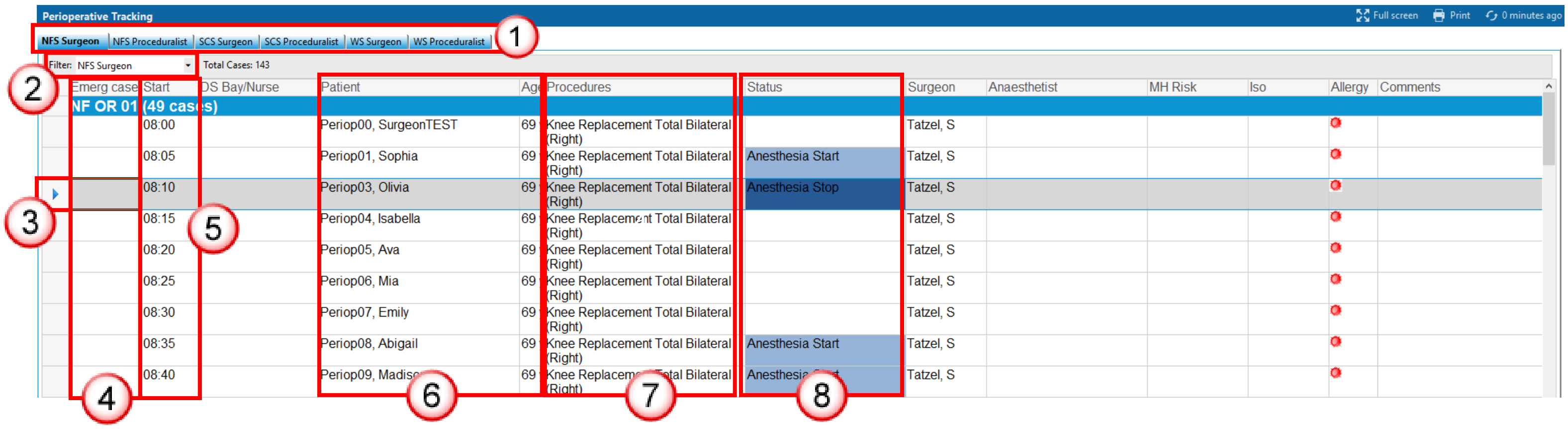
Add On Tabs: The Add On Board Will Display Urgent cases Only




1. **Perioperative Tracking displays various views (or tabs)** depending on your area/login. This view acts as a slate, a communication tool, and eliminates the need to search for patients individually.
1. **Filter**: You can use this functionality to view urgent cases for 'Today' or 'All cases' in the Add on tabs.
2. **Perioperative Tracking Tollbar**: Contains various tools, but the patient chart icon is only available to for the surgeons.

3. **Blue Forward Arrow**: Double-click the **Blue forward arrow** to open the patient's chart.
4. **Order Column**: Indicates priority of an urgent procedure. **<u>This will be updated by the nurses.</u>**
5. **Decision to Treat Column**: Illustrated the date and time the decision to treat a patient was taken.
6. **Booking Priority Column**: Indicates the booking priority of an urgent case which will be updated by the nurses.
7. **Changed Priority Column**: Shows if the priority of a case has been altered by the nurse.
8. **Outcome Column**: Indicates the outcome of a case.
9. **Anticoagulation Status Column**: Shows if a patient is on anticoagulation.

Proceduralist and Surgeon Tabs: Where Elective Cases Will Be Displayed Per Location




1. **Perioperative Tracking displays various views (or tabs)** depending on your area/login. This view acts as a slate, a communication tool, and eliminates the need to search for patients individually.
2. **Filter**: You can use this functionality to view cases in Main OR or Endoscopy.

3. **Blue Forward Arrow**: Double-click the **Blue forward arrow** to open the patient's chart.
1. **Emerg Case Column**: Indicates if a procedure is emergency, which is updated by the nurse.
2. **Start Column**: Shows the time procedure is booked.
3. **Patient Name and Age Columns**: Shows patient first and last name and age respectively.
4. **Procedures Column**: Shows the type of procedure patient is scheduled for.
5. **Status Column**: Indicated the status of the procedure, can be Anesthesia Start and Anesthesia Stop.

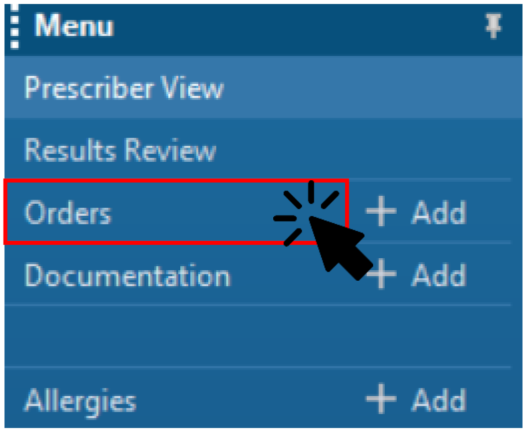
## INTRA-PROCEDURE

**Provide Verbal Orders for Co-Signature in the Operating Room for medications required during the procedure.**

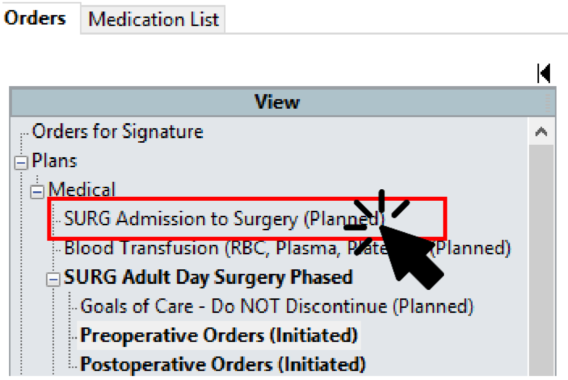
## POST-PROCEDURE

Follow these steps to complete post-procedures workflow.

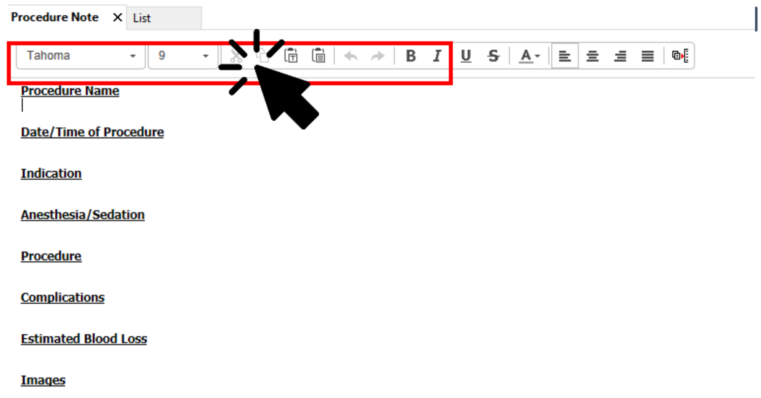
1. Navigate to Table of Contents (Blue Menu) and select **Orders**.



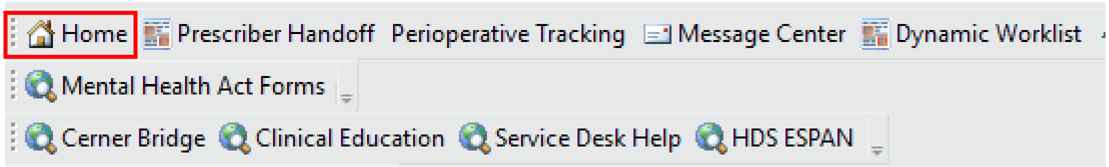

2. Review the Recovery phases of SURG PowerPlan and modify if required (reconciling with Anesthesia PowerPlans).



3. Navigate to Inpatient Workflow MPage and click on the appropriate Dynamic Documentation hyperlink.
4. Complete Op/Procedure Note by clicking into each section and typing or using Dragon Dictation.

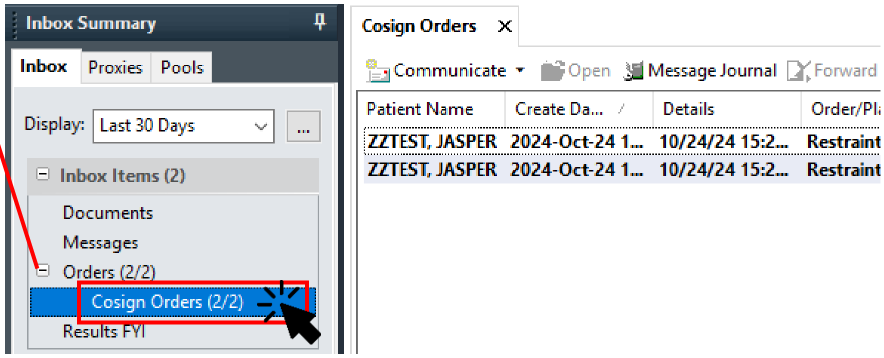



5. Click Sign/Submit ;
6. Click on the 'Home' Icon to access your inbox orders to Co-Sign any Intraop/ Intraprocedure Verbal Orders

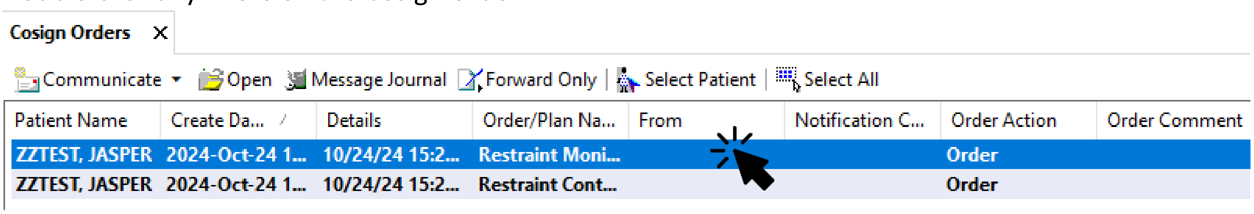



7. navigate to Cosign Orders (2/2) located in the Inbox Summary column.

Expand **Orders** by pressing this button if required



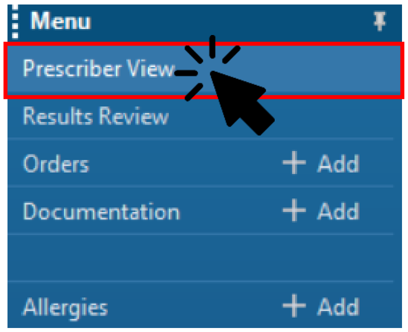

8. Double-click anywhere on the Cosign Order



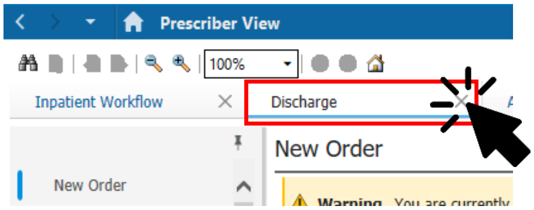
9. Follow the "Prescriber Cosign Workflow" tip sheet for more information on cosign orders.

## DISCHARGE

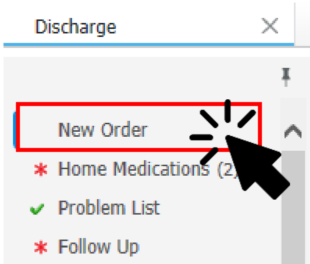
1. Navigate to Prescriber View.



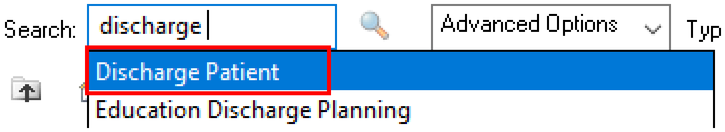

2. Select the Discharge tab.



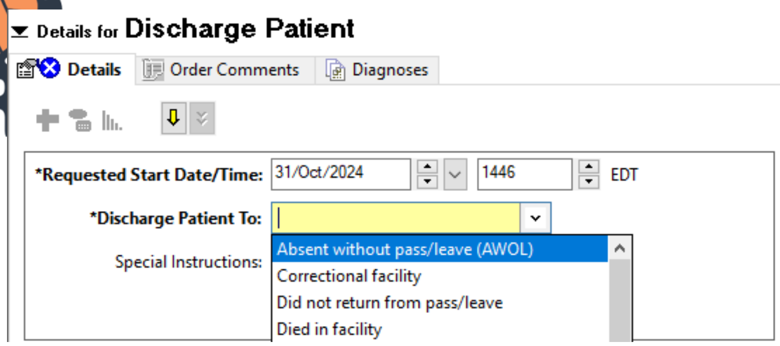

3. Navigate to **New Order Entry** component. Select + in the right-hand corner.



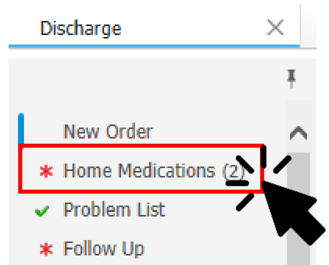

4. Click + Add on top left-hand corner.
5. Search "Discharge Patient" within New Order Entry and select **Discharge Patient**.



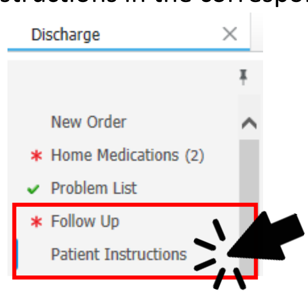

6. Modify Details.



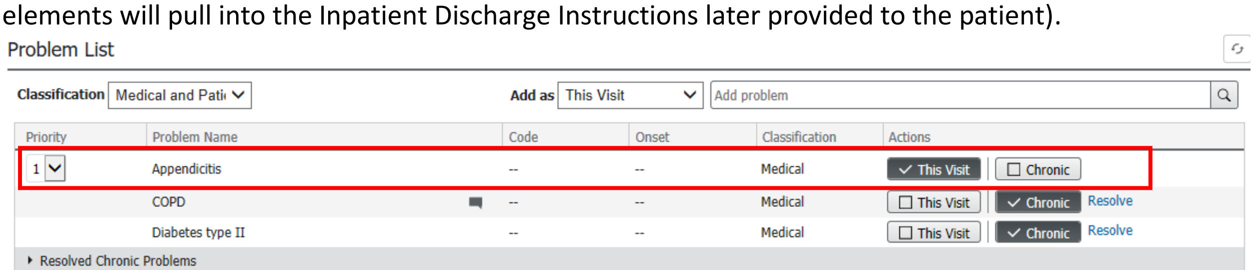

7. Click Sign .
8. Navigate to Home Meds component on Discharge MPage.




9. Click on the Discharge to Home hyperlink to complete Meds Rec.
10. Follow Medication Process - Discharge Medication Reconciliation tip sheet for more detailed discharge med rec.
11. Add relevant Follow Up and patients instructions in the corresponding component.




12. Populate Patient Instructions (i.e. activity restrictions, diet restrictions, return to care if etc.).
13. Document Discharge "This Visit" Diagnosis in Problem List component if not already done (All of the elements will pull into the Inpatient Discharge Instructions later provided to the patient).



14. Scroll down the component list and select Discharge Summary to complete a Discharge Summary Note.