

# Novari ATC Creating a Repeat/Follow-up Series

To utilize the functionality of adding “Case is part of a Repeat/Follow-up Series”, select the check box here to prompt for more information during the Case Add process. This is most often used for endoscopy procedures to automatically add the case to the waitlist upon times specified when created as a repeat/follow-up case.

Case is part of Repeat/Follow-up Series

## Creating a Repeat/Follow-up Series (if applicable)

Select the Case is part of a Repeat/Follow-up Series check box during the case add case process. Note that this can also be done through the case completion notification.

ATC will prompt for more information.

Add the Care Plan by selecting the desired options. Note: if the option of add to waitlist later, the case will appear on the waitlist as specified.

**Step 1: Add Care Plan**

Specify the information required for any repeat/follow-ups for this case. \* denotes a mandatory field

Add to be activated to the Waitlist later \*  
 Add to Waitlist now \*

What is the target date for this case? \* 2022/02/25

+/-: \* 2 weeks

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**Additional Cases**

Repeat/Follow-up Every: \* 6 months

+/-: \* 1 weeks

# of repeats/follow-ups: \* 1 [History](#)

Confirm information in Step 2.

### Step 2: Confirm Follow-up Case Information

Confirm the care venue, diagnosis category, procedure and priority for the repeat/follow-up cases.

**Case Information**

Care Venue:

Service:

Diagnosis Category:

Procedure: Procedure Description: COLONOSCOPY  
Consented Procedure: COLONOSCOPY [Edit](#)

**Care Plan**

Repeat/Follow-up Every: 6 months (+/- 1 week) reoccurring 1 time [Edit](#)

±/- Total Days

**Priority** (confirm)

1 (56 days)  (recommended)

2 (182 days)

3 (185 days)

Review case information and select Continue.

### Review Created Follow-up Cases

You can now edit booking forms or fill in custom screens for the new follow-up cases. These cases are on your Repeat/Follow-up List until activated, when they will be placed on your waitlist.

**Care Plan**

Repeat/Follow-up Every: 6 months (+/- 1 week) [Edit](#)

<p>1. <a href="#">View this Case</a> <a href="#">Activate to Waitlist</a></p> <p>Activation Date: 2022/02/11</p> <p>Latest Date: 2022/04/08</p> <p>Procedure: COLONOSCOPY (Other)</p> <p>Priority: 1</p> <p><input checked="" type="checkbox"/> Additional Information Required</p> <p><input checked="" type="checkbox"/> Booking Information</p>	<p>2. <a href="#">View this Case</a></p> <p>Activation Date: 2023/01/16</p> <p>Latest Date: 2023/03/13</p> <p>Procedure: COLONOSCOPY (Other)</p> <p>Priority: 1</p> <p><input checked="" type="checkbox"/> Additional Information Required</p> <p><input checked="" type="checkbox"/> Booking Information</p>
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The cases created will appear on the waitlist per specifications in each step.

Note: this can also be done on the Case Completion notification.

Tasks - Case Completions Logged in: Dr. Lam, Allen, Dr. Ajayi, Aba...

Main Dashboard List **Tasks** Preop Calendar Documents

Currently Selected Providers  Show Pooled Patients Case Completions (19)

Name	MRN	Procedure	Provider	Care Venues	Surg Date	Add Repeat/Follow-up	Clear All
<a href="#">TEST_IITSTUDENT_1</a>	H000001016	GAST/ESOPHAGEAL DILATN ENDO (Other) 75 minutes	Dr. Jones , Mark	BCHSEND	2022/06/01		<input type="button" value="Clear"/>
<a href="#">TEST_IITSTUDENT_13</a>	H000001028	GASTRO/ESOPH BANDING ENDO (Other) 75 minutes	Dr. Jones , Mark	BCHSEND	2022/06/01		<input type="button" value="Clear"/>

## GI ENDO Reporting Requirements

If the case is any type of colonoscopy procedure, the system will prompt for GI Endo reporting information. This will happen after the case is added to ATC.

**QuickScreen Data Collection**

Sequia, Giant

[CCO Decision Tree \(Prior to Feb 2019\)](#)  
[CCO Decision Tree \(Feb 2019 onwards\)](#)  
[Reference Guide for Endoscopists](#)

**GI Endoscopy DSP Data Capture (Triggered by Px Category: ENDOSCOPY COLON (WITH CIRT REPORTING) (GASTRO))**

<b>Primary Reason for Colonoscopy* (?)</b>	FT - Abnormal FIT
<b>Is this case a repeat/follow-up? (*)</b>	<input type="radio"/> Yes <input checked="" type="radio"/> No
<b>Bowel Preparation Type* (?)</b>	none

**Prior Inadequate/Incomplete Colonoscopy**

<b>Prior Inadequate/Incomplete Colonoscopy* (?)</b>	<input type="radio"/> Yes <input checked="" type="radio"/> No
<b>Poor Prep (?)</b>	<input type="checkbox"/>
<b>Failed Cecal Intubation (?)</b>	<input type="checkbox"/>
<b>Failure to Clear All Polyps or Incomplete Polypectomy (?)</b>	<input type="checkbox"/>

**Secondary Reason for Colonoscopy**

<b>Symptomatic</b>	<input type="checkbox"/> SA - Patient is symptomatic or has had an abnormal lab test (other than FOBT/FIT)
<b>Surveillance</b>	<input type="checkbox"/> CN - Surveillance for colorectal neoplasm (or long-standing IBD)
<b>First Degree Relative</b>	<input type="checkbox"/> FD - First-degree relative has colorectal cancer
<b>Other Screening</b>	<input type="checkbox"/> OS - Other Screening (e.g. Average-risk primary screening)

(\* denotes required field)  
 Click the (?) for a detailed explanation of the question.

If there is a patient Self delay, add a DART to the patient.

**Edit Unavailable Dates**

Add Unavailable Dates that Affect a Patient's Readiness for Treatment

Interval	Reason	Start Date (YYYY/MM/DD)	End Date (YYYY/MM/DD)	Comment	
<input checked="" type="radio"/> Fixed <input type="radio"/> Indefinite (Place patient on hold)	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="button" value="Add"/>

Existing Unavailable Dates for this Case

	<input type="button" value="Done"/>
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Admission Type	Post Procedural Destination
Outpatient	OUTPATIENT
Notes: (For Office Use Only)	

Generic ATC Providers Office Process Documentation

Created January 2022

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This e-mail or document(s) is being shared in trust.

## Message Function in ATC

Message functionality within ATC includes a messaging functionality between the different modules. Messages cannot be sent from the provider office until the case has been submitted on an OR block at least once.

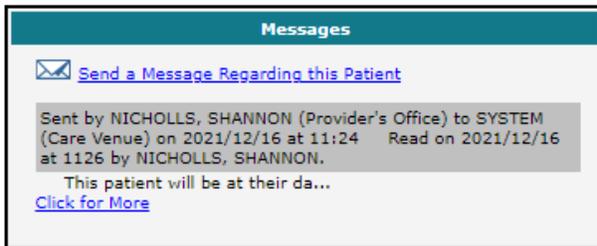
The envelope icon is located at the top right side of the screen. This will be flashing if any messages are unread. Click on patient name to open the case as needed.



Select the envelope to open the message screen. The message will be listed by case to review. Once reviewed, select "Mark as Read". Read messages are then viewable in the "Read Messages" tab for 90 days.

Unread Messages						
From	To	Sent	Surgery Date	Subject	Message	Status
NICHOLLS, SHANNON (MONOR Provider's Office)	SYSTEM SHANNON (Provider's Office)	2021/12/16 at 11:24	2021/12/03	Re: Patient <a href="#">Able, Kitchen</a> MRN# 2440624	This patient will be at their daughter's house for the next week. If needed, please contact... <a href="#">Click for More</a>	<a href="#">Mark as Read</a>

If required, select the "Search Messages" tab to find any message over 90 days past.



All messages sent on cases must be pertinent to the case only and may be subject to FOI requests.

Messages can be sent directly from the View Patient Screen. Do not send messages to PSS as this functionality is not being used by PSF.

Date	Date	Surg Date	Delay	(Cancel)
2022/02/03	2022/04/28	2022/02/25 ( 0730-0900 )	0	
This patient has active status on the following provider's list(s):				
Dr. Marshall, Andrew				
<a href="#">Send a Message Regarding this Patient</a>				