



Novari ATC Provider Module

TEMPLATE



Table of Contents

Table of Contents	2
Overview – Novari ATC	4
Novari ATC Main Screen	6
User Preferences	7
Clinical Data Collection Sheet	8
Provider’s Office Process.....	9
Provider Dashboard	10
Find a Patient.....	10
Task List.....	10
Block Utilization	12
Wait List Overview.....	12
Wait 1: Performance	12
Wait 2: Performance	12
Navigating ATC	13
Adding a Case in ATC.....	14
Add Unregistered Patient.....	15
Add Case to ATC continued.....	16
Oncology Diagnosis	22
Pediatric Reporting.....	23
Endoscopy Care Venue Process	24
Add Case to ATC in Endoscopy Care Venue	24
Elective Surgical Waiting List.....	26
Wait List Columns Defined	27
Case Details Screen	30
Case Details Actions.....	31
Create a Duplicate Entry.....	32
Dates Affecting Readiness to Treat (DARTs)	33
Surgical Blocks	35
Scheduling a Case.....	37
1. Elective Surgical Waiting List – Mini scheduler	37

2. Case Details Screen – Mini Scheduler.....	38
3. Booking Calendar – Drop and Drag Scheduling.....	39
Creating an Empty Appointment.....	42
Pools	44
Adding a Case to a Pool	44
Scheduling Pooled Case to Pool Block	46
Women’s and Babies Pool Process.....	48
Adding the Case to Women’s and Babies Pool Wait List	48
Women’s and Babies Anesthesia Consult Process.....	50
Women’s and Babies Scheduling Case Process	52
APU Gyne Pool Process.....	54
Adding the Case to APU Gyne Pool Wait List.....	54
APU Gyne Scheduling Case Process	57
Cancelling and Rescheduling	61
1. Elective Surgical Waiting List – Mini scheduler Cancel Reschedule	61
2. Case Details Screen – Mini Scheduler Cancel Reschedule	62
3. Booking Calendar – Drop and Drag Cancel Reschedule	63
Scanning and Uploading Attachments	64
Case Data Verification	68
Transferring a case between Providers.....	69
Transfer a Case Between Care Venues	71
Creating a Repeat/Follow-up Series (if applicable)	74
GI ENDO Reporting Requirements.....	76
Document Management.....	78
Reports.....	78

Overview – Novari ATC

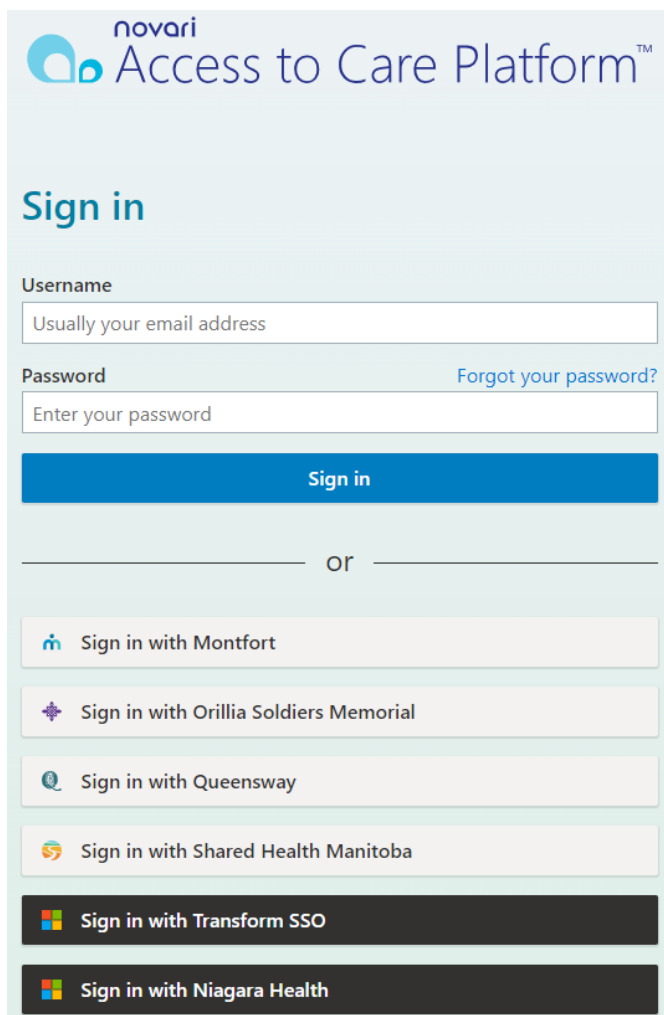
Novari Access To Care (referred to as ATC henceforth) and the Hospital Information System HIS (ORACLE MILLENIUM) communicate with an interface that sends the Case Scheduling information to/from ATC once the block is submitted from the Providers Office.

NOTE: This interface ONLY sends messages for the Care Venues. This does not send anything electronically for the Pre-Surgical Screening Module.

There should not be a reason to create a new appointment in the Hospital Scheduling System if the case is submitted through ATC. Add-on, Emergent or after-hour procedures are not booked through ATC and are scheduled directly into the HIS per hospital process.

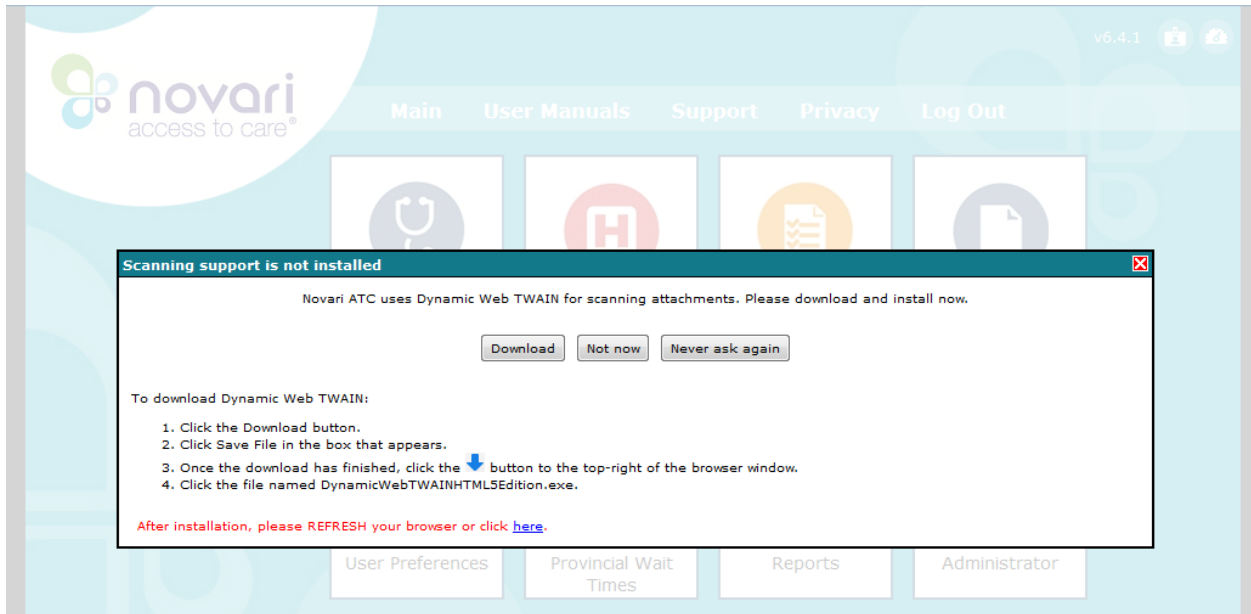
Opening Novari ATC – ATC is a web-based application accessed through an Internet Browser. Enter the URL into one of the supported browsers.

<https://sso.ca.novarihealth.net/>



The screenshot shows the login interface for the Novari Access to Care Platform. At the top left is the Novari logo, consisting of a blue circle with a white dot inside, followed by the text "novari" in lowercase and "Access to Care Platform™" in a larger font. Below the logo is the heading "Sign in". There are two input fields: "Username" with a placeholder "Usually your email address" and "Password" with a placeholder "Enter your password". A link "Forgot your password?" is located to the right of the password field. A blue "Sign in" button is positioned below the password field. Below this is a horizontal line with the word "or" in the center. Underneath are six buttons for social sign-in: "Sign in with Montfort", "Sign in with Orillia Soldiers Memorial", "Sign in with Queensway", "Sign in with Shared Health Manitoba", "Sign in with Transform SSO", and "Sign in with Niagara Health". The last two buttons have a dark background.

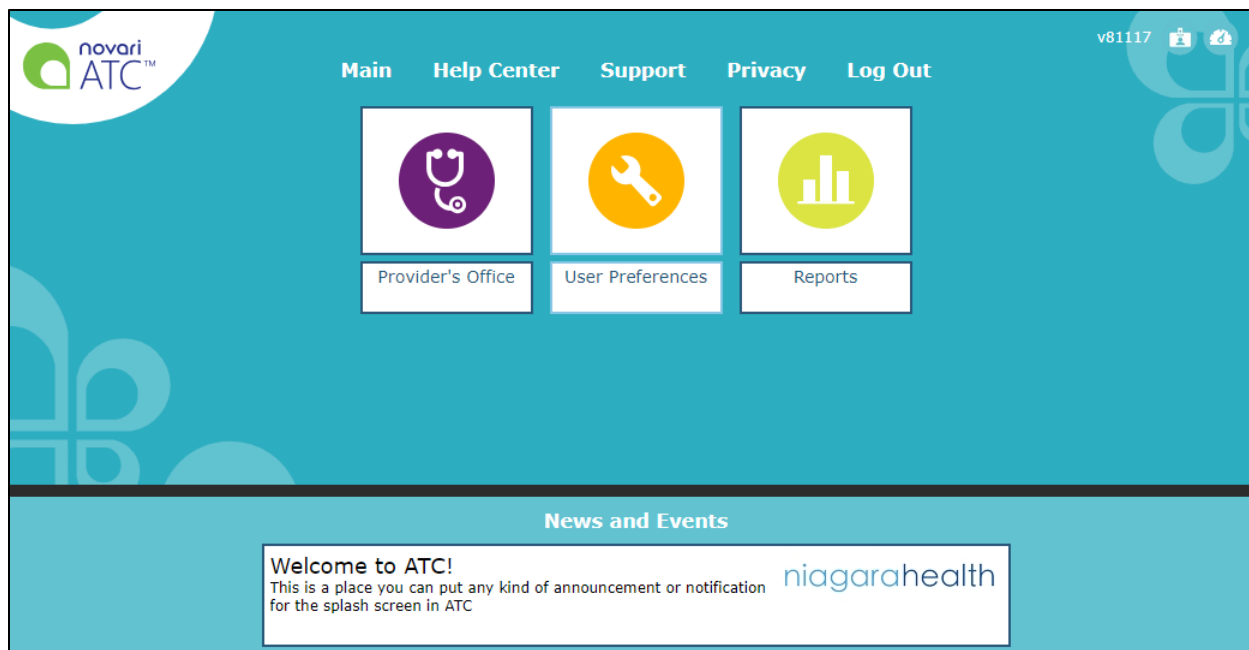
Upon logging in, the system will prompt to install Dynamic Web TWAIN if it is not already installed with a scanner installation. Regardless of which manner chosen to use, uploading or scanning, it is highly recommended to install this plug in.



See this section for more information on Attachments. [Scanning and Uploading Attachments](#)

Novari ATC Main Screen

This splash screen will appear once logged into ATC. The white box at the bottom of screen is a communication tool. Please take note of any announcements in this area.



Modules

The modules appear based on the permissions granted to the user.

User Preferences – click on this module to review user specific settings.

Reports – create custom reports based on provider information.

Options

Help Centre - click on for the Novari ATC Help Center with access to the Knowledgebase, Guides and more.

Support – This will contain contact information for hospital support.

Privacy – Use this option when privacy is required.

Log Out – Please use this option to close the session

User Preferences

Click on this to update preferences based on the user needs. This is where passwords and PINs can be updated if not using SSO method of logging into ATC.

A few settings need to be set for process flow.

- Select YES to: “Review PSS Info on Patient Add” if applicable
- Default search should be Health Card Number

Default Care Venue	Montfort Main OR - MONOR
Default PSS Venue	MON PSS
Password	New Password <input type="text"/> Confirm Password <input type="text"/>
Pin	New Pin <input type="text"/> Confirm Pin <input type="text"/>
Default List Order for Elective Surgical Waitlist	Days / Percent To Target
Measure Patient Targets by Days or Percentage?	<input checked="" type="radio"/> Days <input type="radio"/> Percent
Default Patient Search Field	HCN
Default Patient Search Field Sort Order	Name
Enter Booking Info on Patient Add?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Review PSS Info on Patient Add?	<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> Ask Me Each Time
Show Weekdays Only in Booking Calendar?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Display Notes Column on List View?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Display Days on List as Adjusted?	<input type="radio"/> Days (do not factor unavailable dates) <input checked="" type="radio"/> Adjusted Days (factor unavailable dates)
Display Service Time on List View?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Display Days to Target as Adjusted?	<input type="radio"/> Days (do not factor unavailable dates) <input checked="" type="radio"/> Adjusted Days (factor unavailable dates)
QuickScreen Field to Show on List View?	
Default Responsibility for Payment Selection	
Default "Decision to Treat Date" on Add Patient	No Default (date left blank)
Default Patients Per Page	25
Target Type	Health Centre
Preferred Method to Import Documents	<input checked="" type="radio"/> Scanner <input type="radio"/> Upload
Empty or Not Submitted OR Block Warning	Warn me 14 days before the surgery date. Also, send a warning to my email address (listed below) Yes Send a warning for OR Blocks for these practitioners <input type="checkbox"/> Beaulieu, Chantal <input type="checkbox"/> Marshall, Andrew

Review other settings for provider office workflow.

Clinical Data Collection Sheet

ATC provides a Clinical Data Collection Sheet and is located under the User Preferences.

Clinical Data Collection Sheet	Montfort Main OR ▼	General Surgery ▼
	Print	

This sheet will list the required fields to enter a patient including Alerts, Comorbidities or Medications and all Wait Time required information.

If desired to utilize this sheet, choose the applicable service and print. This sheet is provided to assist provider offices in process only.

Care Venue: Montfort Main OR		Service: General Surgery	
Case Details			
Patient Name:	Wait 1 Priority:	1	2
Procedure:	Wait 2 Priority:	1	2
		3	4
If Cancer: <input type="checkbox"/> Diagnostic <input type="checkbox"/> Palliative <input type="checkbox"/> Reconstruction <input type="checkbox"/> Treatment		Attend Short:	Yes No
Diagnosis Category			
<input type="checkbox"/> BENIGN TUMOR	<input type="checkbox"/> BILE DUCT AND PANCREATIC DISEASE	<input type="checkbox"/> DISEASES OF TERMINAL ILEUM COLON AND RECTUM	<input type="checkbox"/> DISEASES OF UPPER GI TRACT
<input type="checkbox"/> MALIGNANT (OTHER)	<input type="checkbox"/> OTHER (GEN SURG)	<input type="checkbox"/> PROBABLE MALIGNANCY	<input type="checkbox"/> SARCOMA BONE
<input type="checkbox"/> SKIN CARCINOMA	<input type="checkbox"/> SKIN MELANOMA	<input type="checkbox"/> SMALL BOWEL AND OTHER INTESTINAL DISEASE	<input type="checkbox"/> LYMPHOMA
<input type="checkbox"/> SARCOMA SOFT TISSUE			
Alerts			
Alert			
<input type="checkbox"/> Airway	<input type="checkbox"/> Bleeding	<input type="checkbox"/> Communication	<input type="checkbox"/> CPAP use - Compliant
<input type="checkbox"/> Diabetes	<input type="checkbox"/> Malignant Hyperthermia	<input type="checkbox"/> Medical Condition/Treatment	<input type="checkbox"/> CPAP use - Non-compliant
<input type="checkbox"/> Positioning Restrictions	<input type="checkbox"/> Pseudocholinesterase Deficiency	<input type="checkbox"/> Restrictions	<input type="checkbox"/> Neuro
<input type="checkbox"/> Surgical Condition	<input type="checkbox"/> Violence flag	<input type="checkbox"/> Other _____	<input type="checkbox"/> Obstructive Sleep Apnea
<input type="checkbox"/> Safety Precautions			<input type="checkbox"/> Sleep Apnea
<input type="checkbox"/> None			
Allergy			
<input type="checkbox"/> Latex Allergy	<input type="checkbox"/> Penicillins	<input type="checkbox"/> Sulfa	<input type="checkbox"/> Other Allergies _____
<input type="checkbox"/> None			
Comorbidities			
<input type="checkbox"/> BMI greater than 45kg/m2	<input type="checkbox"/> Cardiac Disease	<input type="checkbox"/> COPD	<input type="checkbox"/> Deep Vein Thrombosis
<input type="checkbox"/> Urinary Problems – Indications for the insertion of indwelling catheter	<input type="checkbox"/> Other: _____	<input type="checkbox"/> None	<input type="checkbox"/> Pacemaker/ICD (patient to be seen by Heart Institute)
Medications			
<input type="checkbox"/> Patient taking anticoagulants, Antiplatelets or Corticosteroids <input type="checkbox"/> None			
Anesthetic			
<input type="checkbox"/> General	<input type="checkbox"/> Local	<input type="checkbox"/> Monitored Anaesthetic Care	<input type="checkbox"/> Neuroleptic Sedation
<input type="checkbox"/> Spinal	<input type="checkbox"/> Topical	<input type="checkbox"/> Epidural	<input type="checkbox"/> None
		<input type="checkbox"/> Peripheral Nerve Block - Lower Extremity	<input type="checkbox"/> Peripheral Nerve Block - Upper Extremity
NON-STANDARD TESTS or CONSULTS: _____			

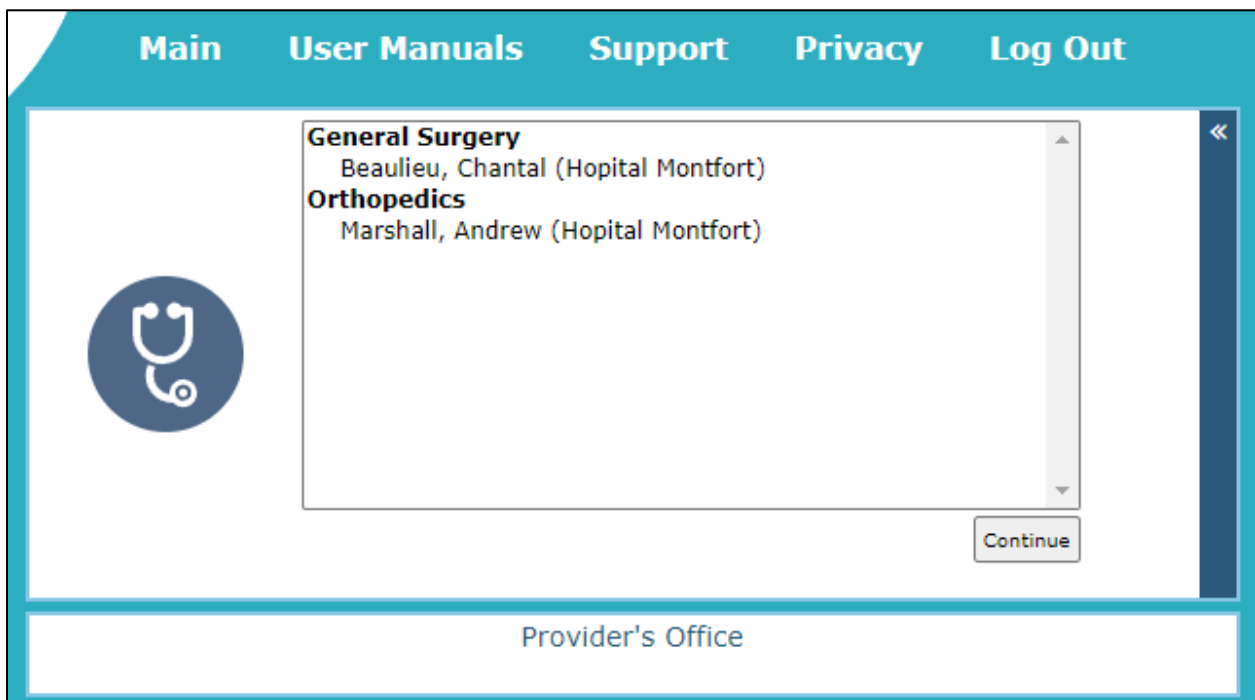
Provider's Office Process

This section addresses the process of entering and submitting cases in ATC to WTIS (as applicable) and to the hospital specific Care Venues.

Select the module "Provider's Office" to start.



Select the provider to work with.

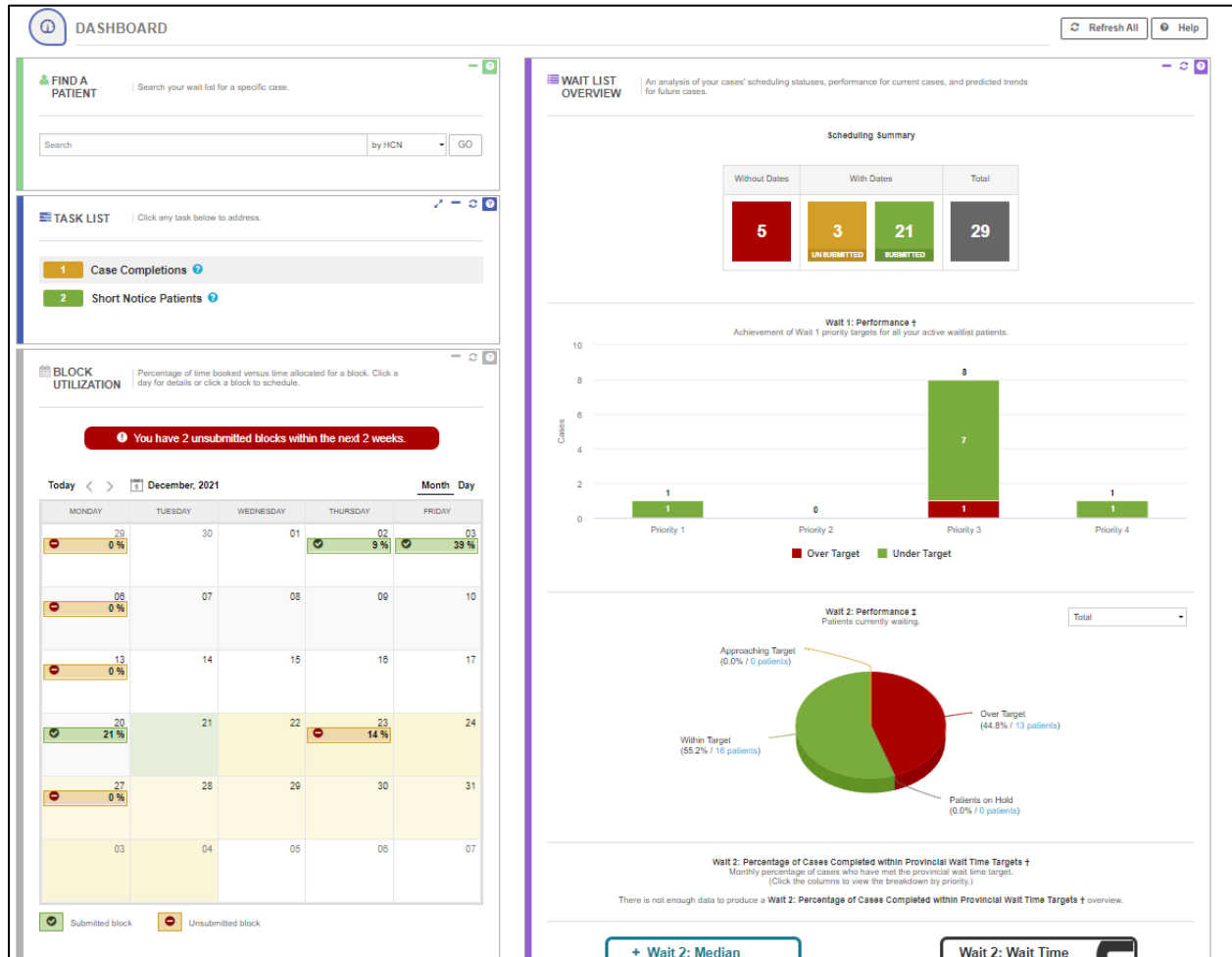


Select the Provider's Office Module to begin. Select the provider to work with and continue. If there is only one provider, ATC will automatically open to the Dashboard unless the provider is part of a pool. IMPORANT NOTE: to enter directly into a POOL, select continue. Do not select a provider.

TIP: To select multiple providers, use the CTRL or SHIFT buttons to select which providers to manage.

Provider Dashboard

ATC defaults to the Provider's Dashboard when first logging in. The dashboard is intended to streamline the waitlist management process and serves as the primary starting point for day-to-day management of the waitlist.



Find a Patient

ATC has incorporated standard patient search utility into the dashboard. Specify the search parameters in the dropdown menu such as MRN, HCN, etc. This will search the cases on the current waitlist ONLY.

Task List

The Task List groups the most pressing tasks into a centralized list. Click any task to address. Some examples are listed in this section.



Task List

Click any task below to address.

14	Wait 2 System Delay Reasons Wait 2 System Delay Reasons cases on your wait list that require your attention
2	Day of Surgery Cancellations Patients on your wait list who have experienced a day of surgery cancellation and may need to be rescheduled
7	Short Notice Patients Patients on your wait list who have agreed to be contacted in the event of a last minute scheduling availability
2	Case Cancellations Patients on your wait list who have been cancelled by the hospital and may need to be rescheduled
74	Case Completions Cases completed and removed from your wait list that need to be cleared
3	Cancelled or Pending Transfer Requests Your transfer requests which have been cancelled, or transfer requests awaiting your acceptance

All tasks should be addressed in a timely manner. These could include Case Cancellations and Day of Surgery Cancellations which are facilitated by the hospital and communicated back via the interface.

Wait 2 System Delay Reasons are to identify cases which require a follow-up as to a possible system delay.

Short Notice Patients are identified during the Add Patient process. This is intended to accumulate a list of patients who could accommodate a short notice spot due to cancellation.

Deceased Patients may be listed in the Task List. These represent patients who were marked deceased in the hospital and are active on the provider Wait List.

Case Completions are meant as communication to the provider module of cases which were successfully completed. These must be cleared regularly as they will impact performance of the user for the provider module.

Block Utilization

Percentage of time booked versus time allocated for a block. The Block Utilization component of the dashboard should be used to ensure that all upcoming days have submitted blocks to the OR and that the block is fully utilized. Selecting a block will bring redirect to the schedule view for that block. Selecting a day will provide an overview of the blocks on the day. Any blocks within two weeks (by default) will be highlighted in RED as a reminder to submit to the Care Venue.

Wait List Overview

While the other components of the dashboard are focused on specific tasks, the Wait List Overview is more concerned with the overall state of your list and performance. An analysis of case scheduling status, performance for current cases and predicted trends for future cases.

Wait 1: Performance

Achievement of Wait 1 targets for all active waitlist patients.

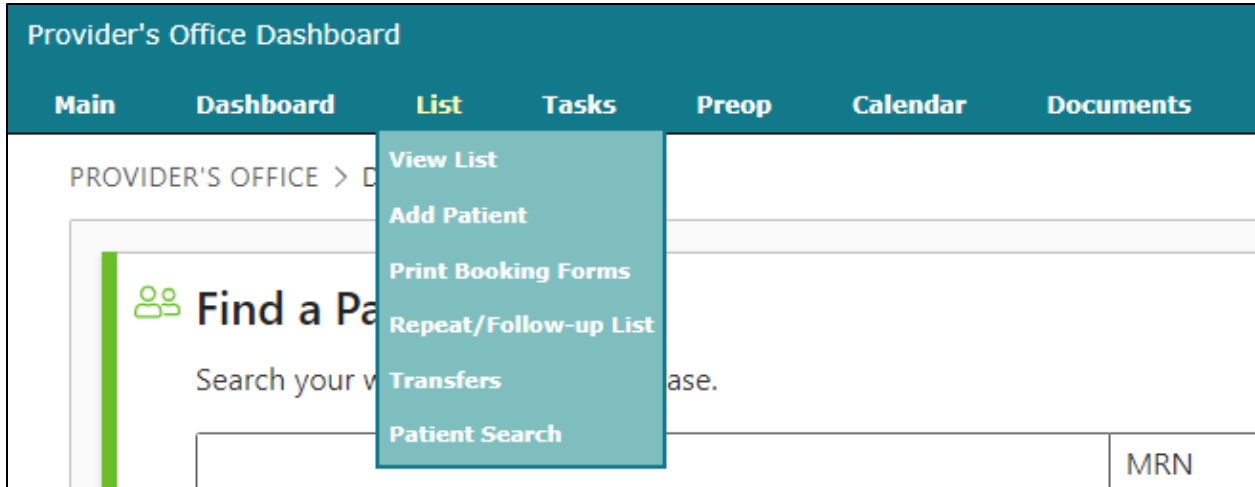
Wait 2: Performance

Patients currently waiting.

Navigating ATC

The Menu Toolbar is the main method of navigating ATC. This is located at the top of every page. The toolbar consists of a series of menu items and its associated dropdown items represent a section of the application to directly navigate to.

Hover over the options to reveal a dropdown menu.



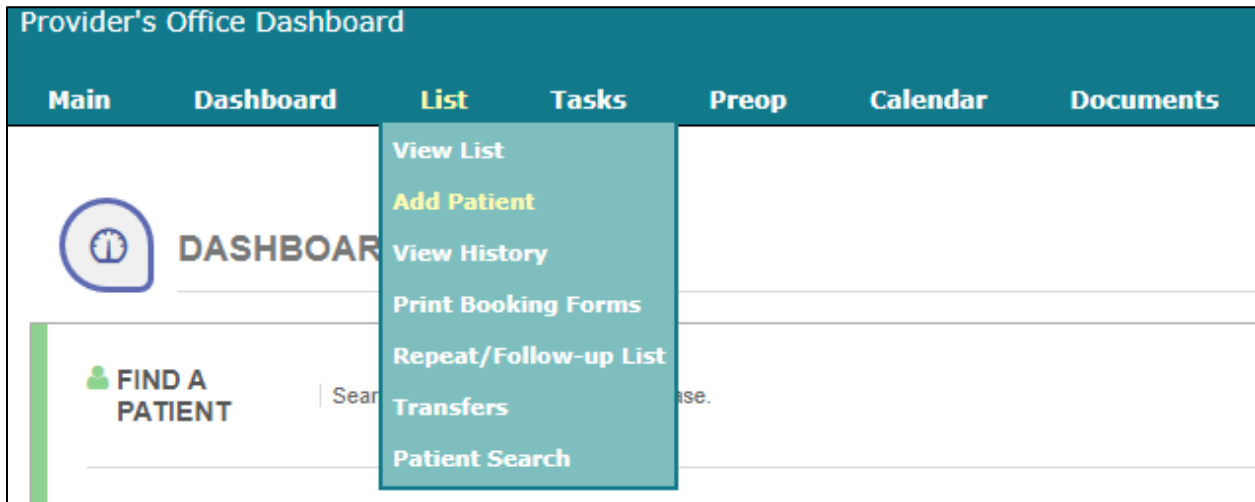
Some of the menu items may not be applicable to the hospital configuration.

Preop drop down menu is not applicable.

ER cases in the task list drop down is not applicable.

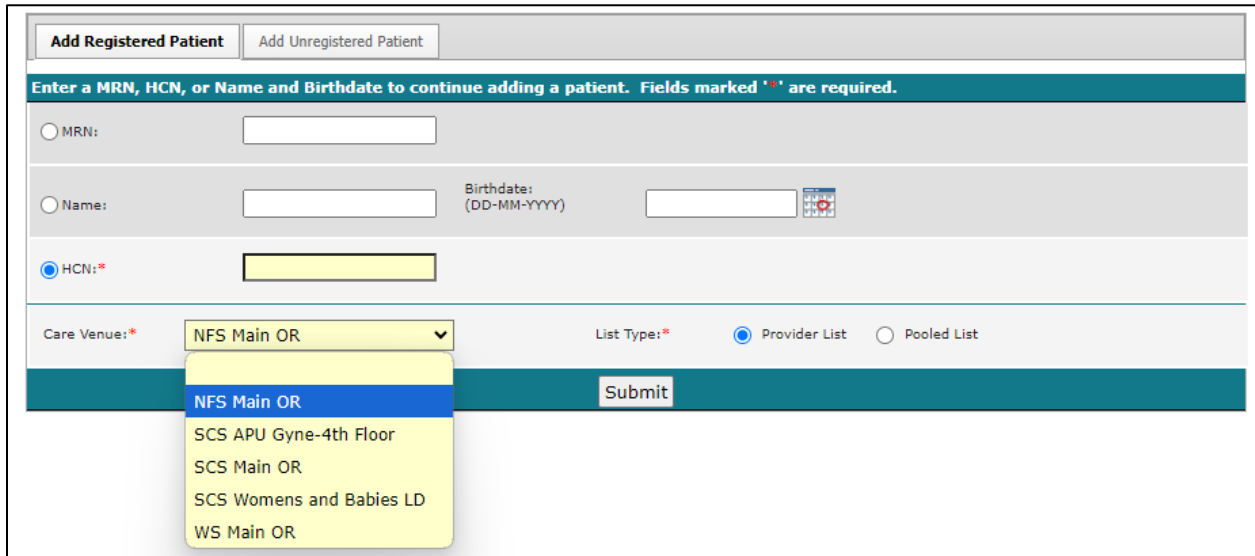
Adding a Case in ATC

Select "Add Patient" from the List drop down menu



Search by Health Card Number as first search. If patient is not found, search by patient name and birthdate. Select correct Care Venue for the patient if applicable.

If applicable, select "Pooled List". If logged directly into the Pool, this will show as the only option.

The image shows a screenshot of the 'Add Registered Patient' form. At the top, there are two buttons: 'Add Registered Patient' and 'Add Unregistered Patient'. Below them is a teal header with the text 'Enter a MRN, HCN, or Name and Birthdate to continue adding a patient. Fields marked "*" are required.' The form has three radio buttons for selection: 'MRN:', 'Name:', and 'HCN:'. The 'HCN:' option is selected. Below the radio buttons, there are input fields for 'Name:', 'Birthdate: (DD-MM-YYYY)', and 'HCN:'. The 'HCN:' field is highlighted in yellow. Below the input fields, there is a 'Care Venue:' dropdown menu with 'NFS Main OR' selected. A dropdown menu is open below it, listing several options: 'NFS Main OR' (highlighted in blue), 'SCS APU Gyne-4th Floor', 'SCS Main OR', 'SCS Womens and Babies LD', and 'WS Main OR'. To the right of the dropdown menu, there is a 'List Type:' section with two radio buttons: 'Provider List' (selected) and 'Pooled List'. At the bottom right of the form, there is a 'Submit' button.

If patient is still not found – add an unregistered patient as documented below.

Add Unregistered Patient

If a patient does not exist in ATC once searching by HCN and Name/DOB, select “Add Unregistered Patient” tab.

<input type="button" value="Add Registered Patient"/>		<input type="button" value="Add Unregistered Patient"/>	
Enter patient information. Fields marked "*" are required.			
Care Venue:*	<input type="text" value="NFS Main OR"/>	List Type:*	<input checked="" type="radio"/> Provider List <input type="radio"/> Pooled List
Last name:*	<input type="text"/>	Street address:*	<input type="text"/>
First name:*	<input type="text"/>	Apt/Suite:	<input type="text"/>
Other/Middle name(s):	<input type="text"/>	City:*	<input type="text"/>
Sex:*	<input type="text"/>	Country:*	<input type="text" value="Canada"/>
Birthdate: * (DD-MM-YYYY)	<input type="text"/>	Province/State:*	<input type="text" value="ONTARIO"/>
HCN:	<input type="text"/>	Postal code/Zip code:*	<input type="text"/>
HCN prov/state:	<input type="text"/>	Home phone:	<input type="text"/>
HCN version code:	<input type="text"/>	Day phone:*	<input type="text"/>
HCN expiry date: (DD-MM-YYYY)	<input type="text"/>	Primary Care Provider:	<input type="text"/>
<input type="button" value="Submit"/> <input type="button" value="Reset"/> <input type="button" value="Cancel"/>			

Complete all required fields which are highlighted in yellow. If more information is known on the patient, please provide as much as possible. HCN is not mandatory as some patients may not have one. If the patient does, ensure it is included as it cannot be added afterwards without contacting the hospital. Please note that the option of “OHIP” for Responsibly for Payment will not be available unless a HCN is provided.

Select the submit button and continue to add the case to ATC as standard process.

The unregistered patient will automatically notify the hospital that a new patient needs to be created. Until this happens, the patient will appear with a “P” or pending MRN. Once the MRN is created, ATC will automatically update the MRN created by the hospital. A message will also automatically be sent to the Provider office with notification that the patient is created. Patients with a “P” or pending MRN cannot be submitted to the Care Venue.

Add Case to ATC continued

Confirm this is the correct patient by selecting OK.

This will then open the Add Patient screen. This screen has been designed and configured specifically for the hospital to support process. Each section is to be completed from left to right.

The Patient Concerns and Notes fields at the bottom of the Add Patient are for Office use and cannot be seen by any other user without permissions to this provider.

Example of Add Patient Screen – Main OR

ZZTEST, NOVARIELEVEN		
MRN: 11002860	Address: 565 King	Home Phone:
DOB: 14-06-1954	Welland, ONTARIO	Day Phone: 905-123-4567
Sex: M	Canada	Primary Care Provider:
HCN: 4687878974	L3C7H2	

* denotes a mandatory field

Provider

Provider: *	Service:	Care Venue:
Dr. Anderson, Patrick Thomas	Urology	NFS Main OR

Additional Personnel: [Manage](#)

Diagnosis Category

Diagnosis Category: *	Diagnosis Description: *

Procedure(s) Add

Procedure 1 Provider: * Anderson, Patrick Thomas

Procedure 1: *	Search	QuickPick	Short List	Full List	Procedure Code:	Est. Procedure Time: *
			<input checked="" type="radio"/>	<input type="radio"/>		minutes

Body Site: *

Procedure Notes:

Responsibility For Payment: *

Referral Information

Referral Type: *

Important Dates (DD-MM-YYYY)

Decision to Treat Date: *

Dates Affecting Readiness:

To Treat: * Yes No (None Known)

Priority & Anesthesia

Wait 2 Priority Set: * Please choose a procedure

Wait 1 Priority: * (Descriptions)

Anesthetic: *

General Info. & Alerts

Attend Short: Yes No

Patient Alert/Allergy Indication?: * Yes No

Comorbidities: Yes No (None Known)

Relevant Medications: Yes No (None Known)

Admission Venue: *

Post Procedural Destination: * None Available

Case is part of Repeat/Follow-up Series

Patient Concerns: (For Office Use Only)

Notes: (For Office Use Only)

Select the appropriate procedure from the drop down menu. If more time is required, update the Estimated Procedure time. If the provider has an average for this procedure, this will be the time shown as Provider Average. If no average is available, the default time will be assigned.

PROCEDURE NOTES: This is where to enter any specific instrumentation required for the procedure. Also, if there is anything specific to the procedure that is needed to know that is not a standard process.

Procedure(s) Add

Procedure 1 Provider: * Caetano, Helen

Procedure 1: * Search QuickPick Short List Full List Procedure Code: Est. Procedure Time: *

ADENOIDECTOMY 2563696581 36 mins
Provider Average: 36 (Apply)
Setup:10 / Cleanup:5

Consented Procedure 1: *
ADENOIDECTOMY

Body Site: *
 Left Right Bilateral

Procedure Notes:
Add instruments here
Characters: 20/200

Responsibility For Payment: *

Select the proper laterality. If Other is selected, no further information is required.

Additional Procedures may be added after the first procedure information is filled in.

Procedure(s) Add

Procedure 1 Provider: * Gravelle, Catherine Anne

Procedure 1: * Search QuickPick Short List Full List Procedure Code: Est. Procedure Time: *

BIOPSY CONE BIOCONC 30 mins
Default: 30 (Apply)
Setup:10 / Cleanup:10

Consented Procedure 1: *
BIOPSY CONE

Body Site: *
 Left Right Bilateral

Procedure Notes:
Procedure notes - add equipment and procedure based notes

Responsibility For Payment: * OHIP

If an additional procedure is required, select Add next to the word Procedure(s).

Procedure(s) Add

Procedure 1 Provider: * Gravelle

This will open a second procedure box. Fill in as applicable.

Procedure 2 Provider: * Gravelle, Catherine Anne	
Procedure 2: * Search QuickPick Remove	<input checked="" type="radio"/> Short List <input type="radio"/> Full List Procedure Code: <input type="text"/>
Body Site: *	Est. Procedure Time: * <input type="text"/> minutes
Responsibility For Payment: * OHIP	Procedure Notes: <input type="text"/>

ATC will automatically prompt for further information as applicable. If a New Referral type is selected, new options will appear for Referral Type, Source, etc. Enter all appropriate dates. Note these will dynamically appear based on Referral Type.

Referral Information	
Referral Type: * New Referral	Referral Source: *
Wait 1 System Delay Reasons: <input type="radio"/> Yes <input type="radio"/> No <input type="button" value="Edit"/>	
Referring Provider: <input type="text"/>	
Important Dates (YYYY/MM/DD)	
Referral Date: * <input type="text"/>	Consult Date: * <input type="text"/> Click to use Consult Date
	Decision to Treat Date: * <input type="text"/>

Important: Ensure any DARTs or DARC's are added if known at the time of entering the case into ATC. Return to the patient view to add DARTs and DARC's if needed in the Case Details screen.

Dates Affecting Readiness:	
To Treat: * <input type="radio"/> Yes <input type="button" value="Edit"/>	To Consult: * <input type="radio"/> Yes <input type="button" value="Edit"/>
<input type="radio"/> No (None Known)	<input type="radio"/> No (None Known)

Select the appropriate information from the dropdown menus as applicable.

Priority & Anesthesia		General Info. & Alerts	
Wait 2 Priority Set: * Please choose a procedure	Wait 1 Priority: * <input type="text"/>	Attend Short: <input type="radio"/> Yes <input checked="" type="radio"/> No	Patient Alert/Allergy Indication?: * <input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> No Known <input type="button" value="Edit"/>
Anesthetic: *		Comorbidities: <input type="radio"/> Yes <input type="radio"/> No (None Known) <input type="button" value="Edit"/>	Relevant Medications: <input type="radio"/> Yes <input type="radio"/> No (None Known) <input type="button" value="Edit"/>
		Admission Venue: *	Post Procedural Destination: * None Available
		<input type="checkbox"/> Case is part of Repeat/Follow-up Series	
Patient Concerns: (For Office Use Only)		Notes: (For Office Use Only)	
<input type="text"/>		<input type="text"/>	
		<input type="button" value="Submit"/> <input type="button" value="Reset"/> <input type="button" value="Cancel"/>	

In the General Info & Alerts section, identify a “Short Notice” patient by selecting yes in the Attend Short area. This will allow the case to appear in the Short Notice patient list on the Dashboard and can be searched for in the filter.

Complete all known information regarding the patient. Some questions may be mandatory and are required to be answered such as the examples below. For any mandatory requirements, if the question was not asked of the patient, select Unknown.

In Niagara Health, there are several required questions and are different depending on each Care Venue. Please fill in any information known on the patient here.

The screenshot shows a web form titled "Patient Alerts". It is divided into three main sections:

- Mandatory Response:** This section contains two rows of questions, each with radio button options for Yes, No, and Unknown.
 - Diabetes - Insulin dependant: * (Yes, No, Unknown)
 - Malignant Hyperthermia (MH): * (Yes, No, Unknown)
- Allergies:** This section contains one row of a question with radio button options for Yes, No, and Unknown.
 - Latex Allergy: * (Yes, No, Unknown)
- Indicate Other Patient Alerts:** This section contains several sub-sections, each with a list of checkboxes:
 - Alerts:**
 - ANESTHETIC ALERT**
 - High risk of aspiration
 - Known or suspected difficult intubation or ventilation
 - Previous general anesthetic / Procedural sedation concerns
 - INFECTION CONTROL ALERT**
 - Antibiotic Resistant Organism
 - GENERAL PATIENT ALERTS**
 - Acting out behaviour
 - Anemia (current history), bleeding disorder, and/or active bleeding
 - Anticoagulant Therapy

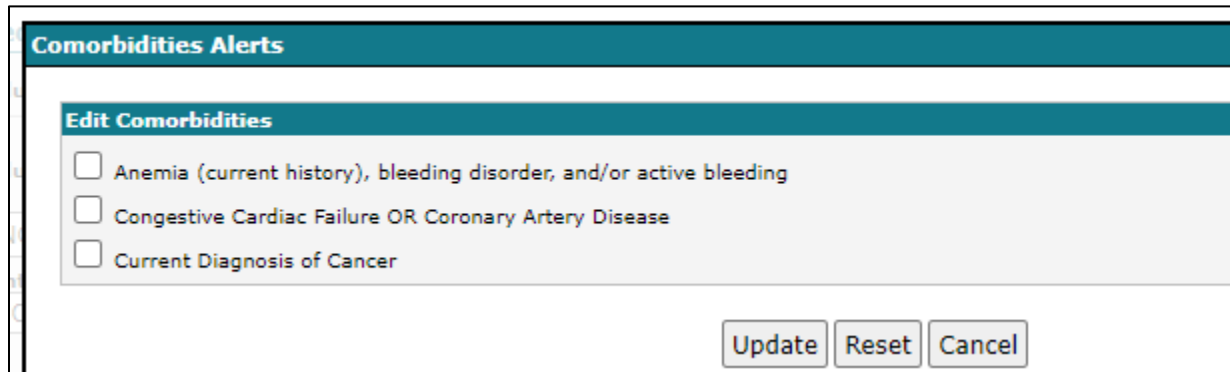
At the bottom of the form are three buttons: "Update", "Reset", and "Cancel".

Scroll down for more options. Specify any required Equipment in this section.

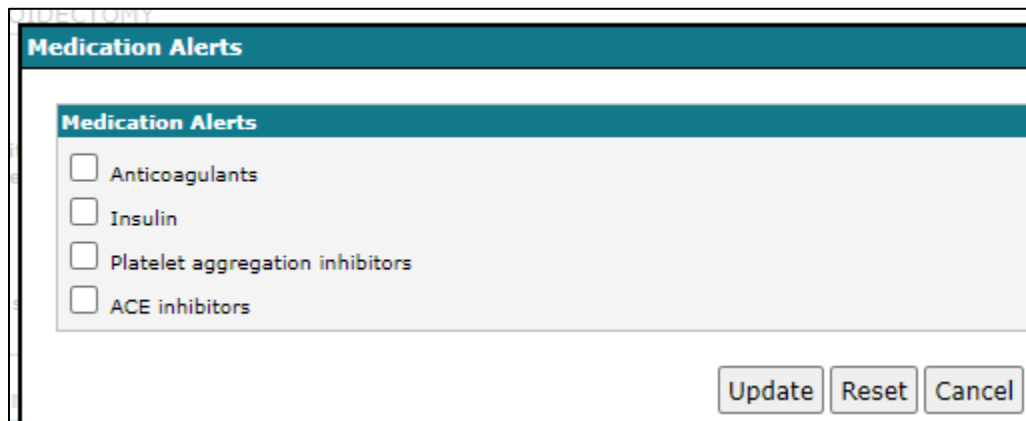
The screenshot shows two sections of a form:

- EQUIPMENT - DI REQUIREMENTS**
 - C Arm - Full
 - C Arm - Mini
 - Seed Molli
 - Seed Nuclear
 - Sentinel Node
- EQUIPMENT - MONITORS**
 - NIM Monitor
 - Spy Camera Monitor

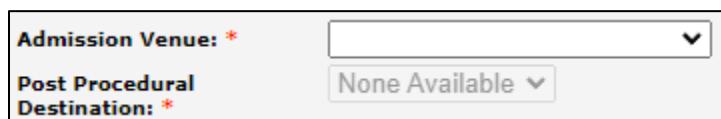
Niagara Health is gathering information on the patient Comorbidity. Open this section and select appropriate options. Note that these sections may be expanded in the future.



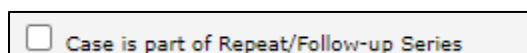
Select appropriate medications the patient is currently taking.



Select the Admission Venue and Post Procedural Destination as appropriate.



To use the functionality of “Case is part of a Repeat/Follow-up Series”, select the check box here to prompt for more information. This is most often used for endoscopy procedures. See [Creating a Repeat/Follow-up Series](#) later in this document. [Creating a Repeat/Follow-up Series \(if applicable\)](#)



Once the case information is complete, select submit to add the case to the provider wait list. At this point, the system should automatically direct to the PSS/PSAC information. If the criteria of the case warrants, there may be automatically added Preoperative Activities.

Niagara Health is not using Preoperative Requirements at this time.

Preoperative Requirements	Notes	Date of Requirement (DD-MM-YYYY)	Results Rec'vd	Completed	Results Expire (DD-MM-YYYY)	Add	
There are no Preoperative Requirements for this patient.							
PSS Preoperative Activities	Notes	App. Date	Patient Tracking	Results Rec'vd	Completed	Results Expire (DD-MM-YYYY)	Add
	Anesthesia Consult (includes Nurse)			<input type="checkbox"/>	Not Completed		Ignore
	OnTrac Review			<input type="checkbox"/>	Not Completed		Ignore

The OnTrac review will be automatically added to cases in which Anemia is identified on the patient. This is used by the hospital to identify patients to be optimized.

If no PSS activities were added to the case automatically but the provider requested an activity, select one from the Add button for available options.

PSS Preoperative Activities	Notes	App. Date	Patient Tracking	Results Rec'vd	Completed	Results Expire (DD-MM-YYYY)	Add
There are no PSS Preoperative Activities for this patient.							

A pop up window will appear. Select the appropriate options.

Add a PSS Preoperative Activity

- Anesthesia Consult (includes Nurse)
- No Pre-Op Required
- Nurse Consult
- Ontario Health at Home
- OnTrac Review
- Ostomy Nursing

Select OK on the case. This completes the patient add process. The case is now viewable on the provider Wait List.

Oncology Diagnosis

When adding a case to ATC which is identified as Oncology or Possible Oncology, the system will ask for updated priority scores to correspond to the directions from Ontario Health Cancer Care Ontario OH/CCO.


Select the reason for the procedure that is being performed from the drop down menu.

SYSTEMTEST, PERIOPSIX

WTIS Oncology
(Triggered by Dx: LYMPHOMA)

Intent of Surgery * (?)

- For diagnosis, staging or surveillance after cancer treatment
- Palliative
- Reconstruction
- Treatment of Cancer


 The information gathered on this screen is critical to the patient record. You will not be allowed to make any modifications to this patient until this information has been supplied.

Once selected, the system will further prompt for an updated Priority Score based on the selection made. Select the appropriate options and Reason for Change.

SYSTEMTEST, PERIOPSIX

WTIS Oncology
(Triggered by Dx: LYMPHOMA)

Intent of Surgery * (?)

 **Wait 2 Priority ***


The current Wait 2 Priority score is invalid for "WTIS Oncology".
Please choose an appropriate priority score

Current Wait 2 Priority Score	Wait 2 Priority Set	Wait 2 Priority Score	Reason for Change
3 (112 days)	WTIS Surgical Oncology - Diagnostic	2 (14 days) <input type="text" value=""/>	<input type="text" value=""/>

[Descriptions](#)

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

- Oncology diagnosis requires new PAT
- Paediatric patient requires new PAT
- Patient status changes Priority
- WTIS Procedure modification changes Priority

 The information gathered on this screen is critical to the patient record. You will not be allowed to make any modifications to this patient until this information has been supplied.

Pediatric Reporting

When a patient is between 18 and 23 years old, the system will prompt for a decision on if the case needs to be reported as a Pediatric or not.


SYSTEMTEST, PERIOPSIX

Paediatric Relevance of Case

Report as a Paediatric Case? *****(?)

(* denotes required field)

Yes
No

 The information gathered on this screen is critical to the patient record. You will not be allowed to make any modifications to this patient until this information has been supplied.

This information is requested on Dental/OMF and General Surgery cases.

Paediatrics

Paediatric Dental/Oral/Maxillofacial procedures are reported using different Service Details and Priority Assessment Tools than adults.

A Paediatric patient is defined as:

- Any patient less than 18 years old; or
- Any patient less than 23 years old, at the discretion of the treating surgeon, who is undergoing a procedure related to an underlying congenital, developmental or genetic disorder, such as a craniofacial abnormality, muscular dystrophy, spina bifida, or cerebral palsy

Paediatrics

Paediatric General Surgery procedures are reported using different Service Details and Priority Assessment Tools than adults.

A Paediatric patient is defined as:

- Any patient less than 18 years old; or
- Any patient less than 23 years old, at the discretion of the treating surgeon, who is undergoing a procedure related to an underlying congenital, developmental or genetic disorder such as a craniofacial abnormality, muscular dystrophy, spina bifida, or cerebral palsy

Endoscopy Care Venue Process

The Endoscopy Care Venues do not require the WTIS reporting data elements and therefore the Add Patient process is significantly less than Care Venues which do report.

Add Case to ATC in Endoscopy Care Venue

Find the patient with the same process documented in [Adding a Case in ATC](#). Select the appropriate Endo Care Venue to schedule into.

There are four diagnosis categories to choose from for Endoscopy procedures.

1. Bile duct and Pancreatic Cancer = ERCP
2. Diseases of the Upper GI Tract: = Gastroscopy, upper GI Endoscopy
3. Diseases of Terminal Ileum, Colon and Rectum = colonoscopies, sigmoidoscopies, proctoscopies, Barrons ligation etc.
4. Small Bowel and other Intestinal Disease = ileoscopy, stomal endoscopy and other small bowel procedures (balloon assisted enteroscopy)

Procedures in the Endoscopy Care Venues are not averaged and are set at a standard time. Procedure times may be increased if it is a complicated case.

For Colonoscopies, the Referral date is a required field for reporting purposes. All Colonoscopy procedures will also have the GI Endo DSP Reporting questions to answer during the Add Patient process. See [GI ENDO Reporting Requirements](#) for detailed information.

Any options such as Admission Venue and Post Procedural Destination that could be defaulted, have been defaulted to help expedite the process.

There are required fields in the Patient Alerts/Allergy section however Cormorbidities and Medications are not used.

Once the case has been added to the Elective Surgical Waiting List, follow the standard process for scheduling [Scheduling a Case](#) and cancel reschedule [Cancelling and Rescheduling](#).

Endoscopy providers may want to utilize the Repeat Follow Up Series functionality explained here [Creating a Repeat/Follow-up Series \(if applicable\)](#)

Example of Add Patient Screen – Endoscopy

SYSTEMTEST, PERIOPSIX

MRN: 11001652	Address: 123 Main St	Home Phone:
DOB: 01-12-2000	Ontario, ONTARIO	Day Phone:
Sex: F	Canada	Primary Care Provider:
HCN: 2349702387	NONONO	

* denotes a mandatory field

Provider

Provider: * Dr. Malhotra, Neel	Service: Gastroenterology	Care Venue: NFS Endoscopy
--	-------------------------------------	-------------------------------------

[Additional Personnel: Manage](#)

Diagnosis Category

Diagnosis Category: * DISEASES OF TERMINAL ILEUM COLON AND RECTUM	Diagnosis Description: * colon issues
---	---

Procedure(s) [Add](#)

Procedure 1 Provider: * Malhotra, Neel	
Procedure 1: * <input type="text" value="COLONOSCOPY"/> <input type="button" value="Search"/> <input type="button" value="QuickPick"/>	<input checked="" type="radio"/> Short List <input type="radio"/> Full List Procedure Code: 2563697521
Consented Procedure 1: * COLONOSCOPY	Est. Procedure Time: * 15 mins Default: 15 (Apply) Setup: 5 / Cleanup: 5
Body Site: * <input checked="" type="radio"/> Other - specify(optional): <input type="text"/>	Procedure Notes: <input type="text" value="Procedure Notes"/> Characters: 15/200
Responsibility For Payment: * Provincial Government (OHIP)	

Important Dates (DD-MM-YYYY)

Referral Date: * 07-10-2024	Decision to Treat Date: * 14-10-2024
------------------------------------	---

Dates Affecting Readiness:

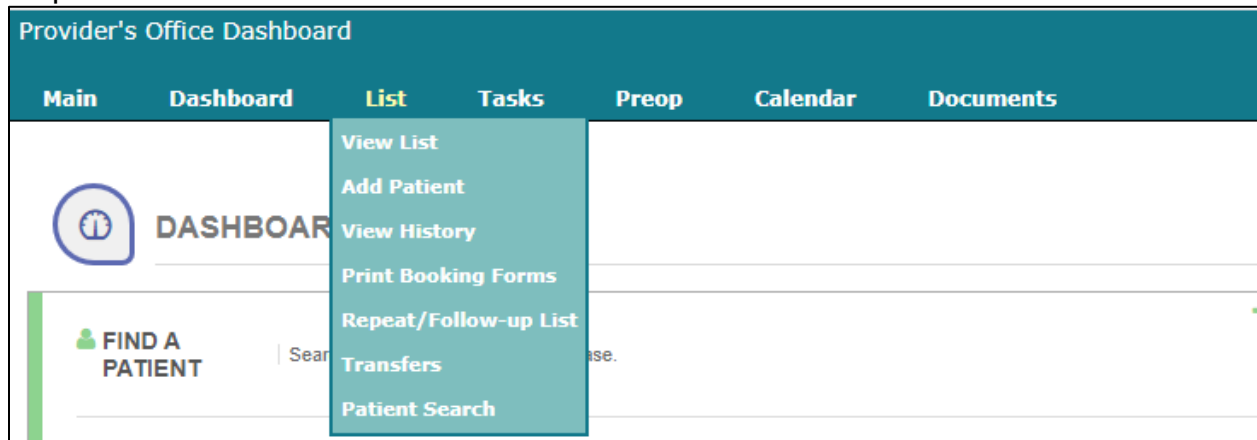
To Treat: * Yes No (None Known)

<p>Priority & ASA Class</p> <p>Wait 2 Priority Set: * (Descriptions) Wait 2 Priority Score GI Endoscopy DSP PAT FT (56 days)</p> <p>ASA Class: * 1 (Descriptions)</p>	<p>General Info. & Alerts</p> <p>Attend Short: <input type="radio"/> Yes <input checked="" type="radio"/> No Patient Alert/Allergy Indication?: * <input checked="" type="radio"/> Yes <input type="radio"/> No <input type="button" value="Edit"/></p> <p>Admission Venue: * Endo Outpatient (ADULT)</p> <p>Post Procedural Destination: * Day Surgery (Adult)</p> <p><input type="checkbox"/> Case is part of Repeat/Follow-up Series</p>
---	--

<p>Patient Concerns: (For Office Use Only)</p> <div style="border: 1px solid black; height: 20px; width: 100%;"></div>	<p>Notes: (For Office Use Only)</p> <div style="border: 1px solid black; height: 20px; width: 100%;"></div>
---	--

Elective Surgical Waiting List

Once a case is added to ATC, it can be viewed and modified by selecting View List in the dropdown menu of List.



This list can be sorted by clicking on the headers either once for ascending, twice for descending. Hover over the headers for an explanation of what each means.

Patients 1- 16 of 16

View List Actions ▾ First Prev 1 Next Last (UNFILTERED) [Filter List](#)

Patients per page: 25

	Cancellations	NL	Name	MRN	Procedure	Target Days (Pri)	Care Venue	Anesth	Next Available	Current Surg Date	Adjusted Days on List	Adjusted Days to Target	PSS Status
<input type="checkbox"/>			TEST, MICHELLE	OM00006908	BIOPSY BREAST BILATERAL (Bilateral) 60 minutes	28 (2)	MONOR	Y		2022/01/07 ✓	14	13	N/A
<input type="checkbox"/>			TEST, BIOPSY	OM00007181	COLOSTOMY (Other) 60 minutes	28 (3)	MONOR	Y		2022/01/07 ✓	14	13	NA
<input type="checkbox"/>			MPCSTRAIN, DENARYS	OM00061494	EXCISION BACK LIPOMA (Other) 30 minutes	28 (3)	MONOR	N		2022/01/13 ✓	7	20	N/A
<input type="checkbox"/>			TEST, ADDY	OM00061465	INGUINAL HERNIA REPAIR (Right) 40 minutes	84 (3)	MONOR	Y		2022/01/07 ✓	15	68	N/A
<input type="checkbox"/>			MPCSTRAIN, BRADLEY TWO	OM00061484	BIOPSY AXILLARY MASS (Right) 45 minutes	84 (3)	MONOR	Y		2022/01/10 ✓	14	69	NA
<input type="checkbox"/>			MAMBTEST, PESSI	OM00007331	EXCISION	84 (3)	MONOR	Y		2022/01/10 ✓	14	69	NA

Along the top of the table, are the core fields: Name, Hospital Identifier, Procedure, Adjusted Days to Target, and so on.

Clicking on a heading will sort the column by ascending or descending.

By default, those patients who have been waiting the longest with respect to their provincial target will be at the top of the list and to return to this view, simply click on the Adjusted Days to Target heading.

Wait List Columns Defined

Clipboard

- The clipboard allows you to select multiple patients to carry out an action on. For example, transferring all clipped patients.

Cancellation

- The Cancellation column categorizes patients based on provincial target days.
- The red circles represent patients who have been waiting the longest with respect to their provincial target.
- Yellow is for patients who are approaching their provincial target
- Green is for patients who are still within their provincial target time
- A number inside of the circles indicates any last-minute cancellations that a patient has experienced. Maybe the room ran late, or the patient was bumped by an emergency. Click to open the previous booking date and cancellation reason.

Note: This column may be helpful in determining between two or more patients who are equally as close to their provincial targets.

Nt. (Notes)

- This will show any internal notes made on the case for office use only.

Paperclip

- The paperclip represents attachments. Click the icon to manage and view attachments.
- Based on surgical requirements, you will need to upload/scan all required documents to the case

Patient Name

- Hovering over a patient's name will display their contact info. Click to navigate to the Case Details page

MRN

- Patient's unique hospital identifier (Medical Record Number)

Procedure

- Procedure name, body site, or laterality, and either the default procedure time or physician specific average time if applicable to your facility.



Target Days (Pri)

- This is the target days calculated when assigned the priority in Add Patient process.

Care Venue

- Where the case is currently planned to be performed.


Current Surgical Date

- Scheduled surgery dates will show up here.
-  - The calendar icon means the patient has not yet been scheduled
- ~~07/03/2024~~ - A date crossed out in red is when a surgery date has been cancelled
-  - A green checkmark means the case has been submitted to the Care Venue

Adjusted Days on List

- The Adjusted Days on List is the number of days the patient has been on the waitlist minus any days they have been unavailable.

Adjusted Days to Target

- Adjusted Days to Target is the number of days the patient is away from their provincial target minus any days they have been unavailable (). A negative number means the patient has waited beyond their provincial target.

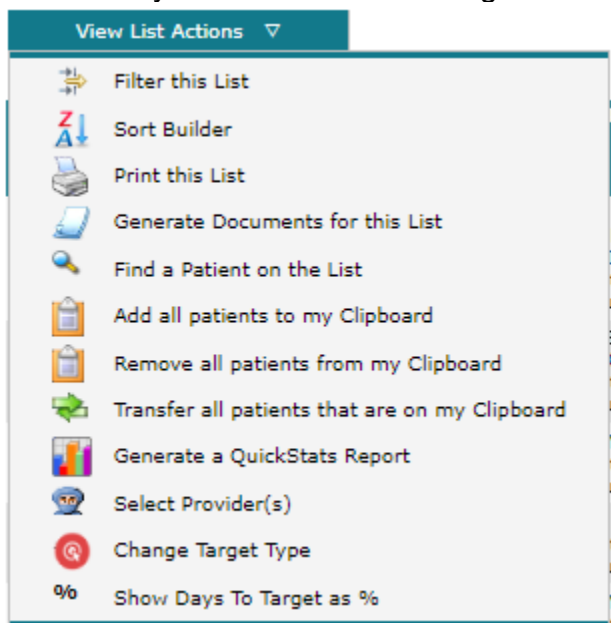
Pre-Surgical Screening – If applicable

- The Pre-Surgical Screening column represents the status of each patient's pre-surgical screening appointments using the colour coding system.
- Red background – not viewed by PSS
- Yellow background – viewed but not complete
- Green background – reviewed and completed (patient ready)

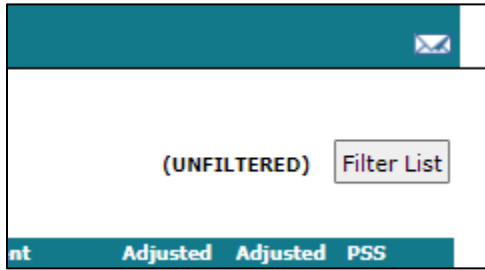
Bi-directional green arrows

- This is how to transfer a patient from one provider list to another provider list or to transfer a patient from an individual provider's list to a pooled list or vice versa.
- This can also be used to transfer responsibility of the case.

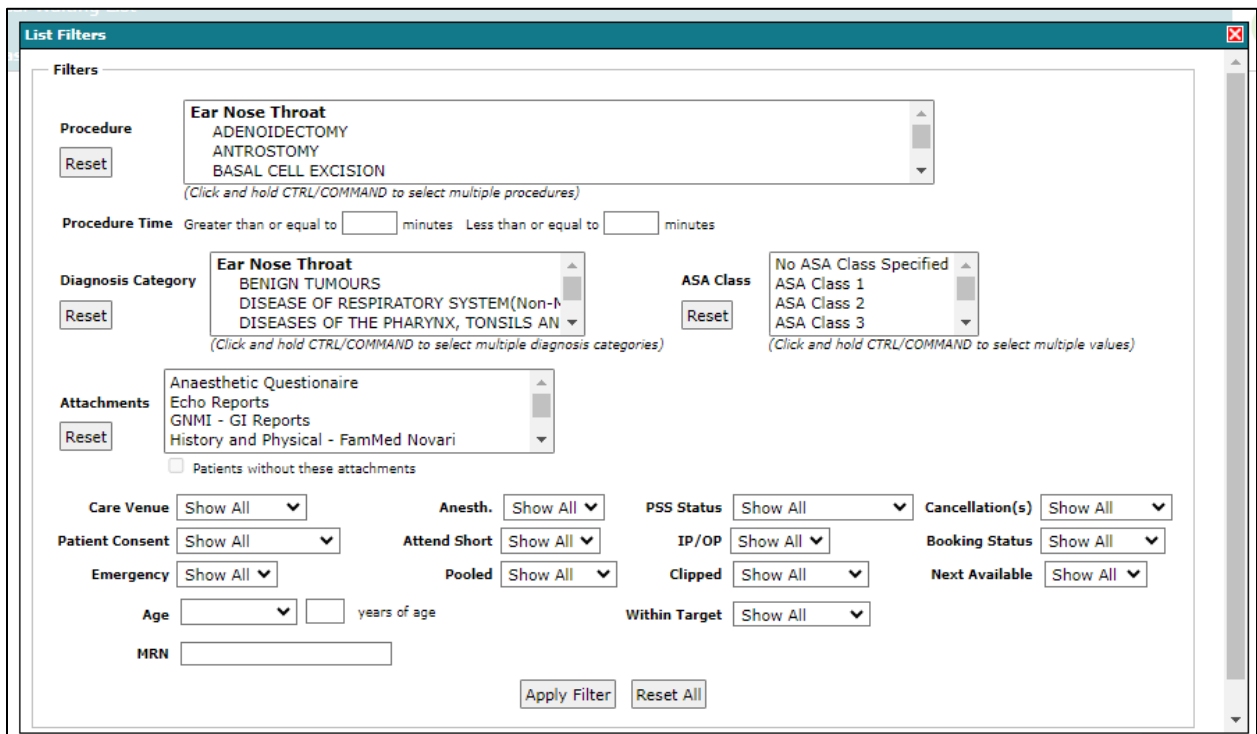
The list may further be sorted using the View List Actions menu.



From the top right side of the screen, there is a robust filter option. Select the Filter List to open filter criteria.



Select the criteria and Apply Filter. Selecting Reset All will clear the filter options.



Case Details Screen

From the Elective Surgical Wait List, the case may be opened and modified by clicking on the patient's name. This will open the case into the Case Details screen.

ADTTEST, NFINPT (edit)						Case Details Actions ▾					
MRN: 11001809 Address: 123 TEST CRT Home Phone: (555)555-5555 DOB: 01-02-1990 Address: NIAGARA FALLS, ONTARIO Day Phone: Sex: M Address: Canada Primary Care HCN: 1234567890 Address: H0H0H0 Provider:						QuickScreens WTIS Oncology Complete Edit					
Account Numbers ADT Account Number: 22002254						This block has been submitted. Please note that any changes will automatically be transmitted to the OR.					
Referral Type		No Referral/Follow-Up Reason		Wait 1 System Delay Reasons		Wait 1 Priority		Adjusted Wait 1 Days Waited			
No Referral/Follow-Up		Existing Patient - New Condition		0							
Diagnosis Category						Diagnosis Description					
MALIGNANT TUMOURS (OTHER)						tumor					
Procedure (Add)						View Procedure History					
Edit: 1. FOREIGN BODY REMOVAL Consented Procedure: FOREIGN BODY REMOVAL Time: 26 Body Site: Bilateral Notes: these are procedure notes Responsibility For Payment : Provincial Government (OHIP)											
Wait 2 Priority	Anesth	Attend Short	Provider	Additional Personnel Manager	Care Venue	PSS Status	PAC Appt. Date	Booking Form?	Patient Alerts	Comor Alerts	Med Alerts
3	Y	N	Dr. Caetano, Helen	0	NFSMAINOR	Sent	NA	N	5	0	0
IP/OP			Admission Type			Post Procedural Destination					
OP			Day Surgery (Adult)			Day Surgery (Adult)					
Patient Concerns: (For Office Use Only)						Notes: (For Office Use Only)					
Decision to Treat Date	Target Date	Current Surg Date	Wait 2 System Delay Reasons	Procedure Audits (Cancellations)	Documents	Attachments	Adjusted Days on List	Adjusted Days to Target	Dates Affecting Readiness		
01-04-2024	29-04-2024	25-07-2024 (0800-0831)	0 (Due)	1	0	0	192	-164			
<input checked="" type="checkbox"/> Send a Message Regarding this Patient											
Sent by NICHOLLS, SHANNON (Care Venue) to SYSTEM (Provider's Office) on 17-06-2024 at 15:44 Read on 19-06-2024 at 0844 by TEST, PROVIDER. Good afternoon. I cannot get a hold of this patient, please send me an updated telephone number. Thanks.											

Any underlined field may be opened and modified as needed. Selecting the blue hyperlink will open the information to modify.

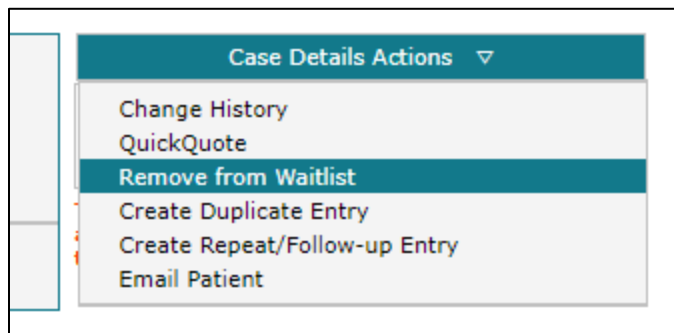
Procedure (Add)						View Procedure History					
Edit: 1. FOREIGN BODY REMOVAL Consented Procedure: FOREIGN BODY REMOVAL Time: 26 Body Site: Bilateral Notes: these are procedure notes Responsibility For Payment : Provincial Government (OHIP)											
Wait 2 Priority	Anesth	Attend Short	Provider	Additional Personnel Manager	Care Venue	PSS	PAC Appt.	Booking	Patient	Comor	Med

Additional procedures may also be added after the initial Patient Add.

This is also where a DART (date affecting readiness to treat) may be added after the patient add process. See [Dates Affecting Readiness to Treat \(DARTs\)](#)

Case Details Actions

On the top right of the Case Details screen is a menu list of Case Details Actions



Change History

- The Change History is a detailed list and description of all changes that have been made to a patient on the waitlist including the date and name of the person who made each change

Quick Quote

- Quick Quote will provide statistical data that is relevant to the currently selected procedure. This will only report if there is enough data on a given procedure/priority combination. If there are not enough similar cases to justify statistical analysis, no information will be provided.

Remove from Waitlist

- Remove a patient from the waitlist for reasons such as a data entry error, the patient no longer wishes to have surgery, or the patient has expired

Creating Duplicate Entry – see [Create a Duplicate Entry](#) for more information.

- Depending on the procedure, there may be times to create a duplicate copy of a waitlist entry. This action is useful when a patient is having two separate surgeries for each laterality. Cataracts for are a good example below.
- After adding the first case for the right eye, using create duplicate entry will automatically add a left eye procedure without having to re-add all of the information
- On the View List screen, view the two entries with the numbers one and two under the MRN number
- Although the two entries are linked, any edits made to one entry will not be made to the second

Repeat Follow-up Case

- See section for full information [Creating a Repeat/Follow-up Series \(if applicable\)](#)

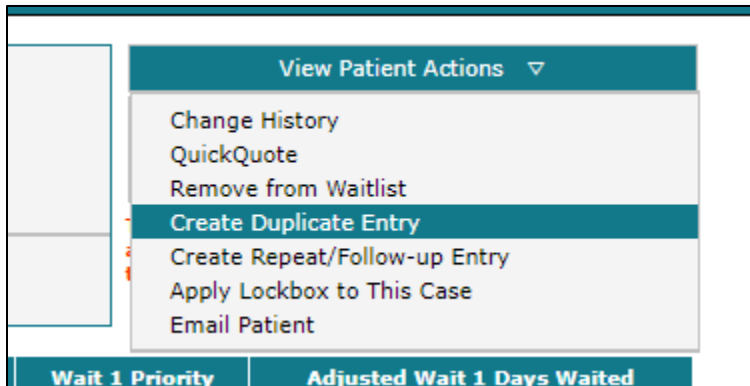
Email Patient

- This may or may not be used in the installation.

Create a Duplicate Entry

NOTE: This functionality is not a true duplicate but rather a copy of a procedure with an updated laterality. This is only being used for booking of cataract procedures.

Add the case to ATC following standard method. Open the patient in the Case Details screen. Select View Patient Actions – Create Duplicate Entry

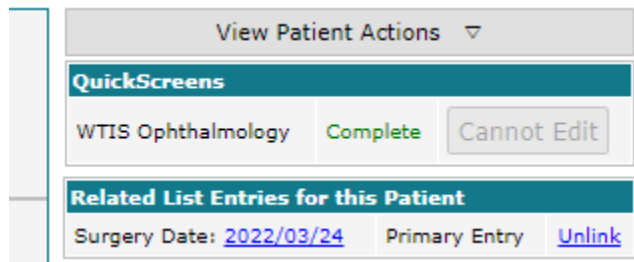


The system will prompt for procedure notes and will automatically select the same procedure with the opposite body site/laterality.

Once Create Duplicate Entry is selected, the system will create the new waitlist entry and load the Case Details screen for the new waitlist entry.

Cancel	Nt.	Name	MRN	Procedure	Target Days (Urg)	Anesth	Next Available	Current Surg Date	Adjusted Days on List	Days to Target	PSS Status
<input type="checkbox"/>		XXXX.XXXX	XXXXXXX [1]	CATARACT, EXTRACTION INTRACAPSULAR WITH INTRAOCULAR LENS INSERTION, LEFT (Left) 7 minutes	182 (4)	N			0	181	Send
<input type="checkbox"/>		XXXX.XXXX	XXXXXXX [2]	CATARACT, EXTRACTION INTRACAPSULAR WITH INTRAOCULAR LENS INSERTION, RIGHT (Right) 7 minutes	182 (4)	N			0	181	Send

Notice in the image above that each of entries is assigned a number, located beneath the MRN. [1] denotes the primary waitlist entry and [2] denotes the secondary waitlist entry.



The image above would be found on the Case Details screen of the duplicate waitlist entry. The surgery date for the primary entry is shown. Clicking on the surgery date, or 'N/A' if a surgery has not yet been determined, loads the Case Details screen for the primary entry.

Selecting Unlink will disassociate a duplicate waitlist entry from the primary waitlist entry. The two cases would continue to exist on the waitlist, but as completely independent cases with no reference to each other. The two cases are linked however they are still managed independently. For instance, if changes to the procedure time, diagnosis, or any information on the primary entry happen, it will not automatically update the secondary entry, and vice versa.

The purpose of keeping a duplicate waitlist entry linked with its primary waitlist entry is to keep closely related procedures visibly linked and to reduce the effort required when duplicating a procedure. A good example of this would be an eye surgery that is required for each eye.

Dates Affecting Readiness to Treat (DARTs)

There may be circumstances when patients are not available for surgery; these are called Dates Affecting Readiness to Treat and entering these dates stops the clock on their provincial wait time. There are two types of DARTs in ATC.

Fixed Hold

- If the patient indicates that they are unavailable for a period of time, use Fixed Hold to enter the date range that the patient has indicated they are not available
- Examples: healed from a previous surgery, back from vacation, end of a season (if seasonal worker)

Indefinite Hold

- If there is a serious question of if a patient will proceed with the procedure, an indefinite hold can be used. This will actually CLOSE the wait time entry.
- When the patient is taken off hold, enter an appropriate Fixed DART for the time the patient was not available. The wait time entry will open a new case with a decision to treat date of when the patient was taken off hold.

Direction is given from Niagara Health to ONLY use Fixed DARTs. These may be entered for one year and the case should be reviewed at that time to extend DART or end.

If PSS additions or modifications are required, select PSS Status link to open the PSS requirements screen if applicable.

Pre-Surgical Screening - Case Details Logged In: Dr. Caetano, Helen

Main Dashboard List Tasks Preop Calendar Documents Patient

! Patient is not ready for surgery. Refer to the Preoperative Requirements and PSS Preoperative Activities lists. Recall

[View History](#)

ADTTEST, NFINPT [\[edit\]](#)

MRN: 11001809 **Address:** 123 TEST CRT **Home Phone:** (555)555-5555
DOB: 01-02-1990 NIAGARA FALLS, ONTARIO **Day Phone:**
Sex: M Canada **Primary Care**
HCN: 1234567890 H0H0H0 **Provider:**

Account Numbers
ADT Account Number: 22002254

Procedural Information
Diagnosis Category: **MALIGNANT TUMOURS (OTHER)**
Diagnosis Description: **tumor**
Procedure: **Procedure Description: FOREIGN BODY REMOVAL (Bilateral)**
Consented Procedure: FOREIGN BODY REMOVAL
Anesthetic: **General**
Provider: **Dr. Caetano, Helen**
Care Venue: **NFS Main OR**
Decision to Treat: **01-04-2024**
Date:
Target to Treat: **29-04-2024**
Surgery Date: **25-07-2024 (0800 - 0831)**
Admission Type: **Day Surgery (Adult)**
Post Procedural: **Day Surgery (Adult)**
Destination:
PSS Venue: **NHS PSS**
OR Booking Form: [View/Print](#)
Unavailability

Preparation & Alerts

Comorbidities
NA

Patient Alerts
Diabetes - Insulin dependant
Malignant Hyperthermia (MH)
C Arm - Full
C Arm - Mini
Latex Allergy

Medication
NA

Attachments
[\(Print/View All\)](#)

Preoperative Requirements	Notes	Date of Requirement (DD-MM-YYYY)	Results Rec'vd	Completed	Results Expire (DD-MM-YYYY)	Add	
There are no Preoperative Requirements for this patient.							
PSS Preoperative Activities	Notes	App. Date	Patient Tracking	Results Rec'vd	Completed	Results Expire (DD-MM-YYYY)	Add
	Anesthesia Consult (includes Nurse)		<input type="checkbox"/>		Not Completed		Delete

[View History](#)

[Send a Message Regarding this Patient](#)

Sent by NICHOLLS, SHANNON (Care Venue) to SYSTEM (Provider's Office) on 17-06-2024 at 15:44 Read on 19-06-2024 at 08:44 by TEST, PROVIDER.
Good afternoon. I cannot get a hold of this patient, please send me an updated telephone number. Thanks.

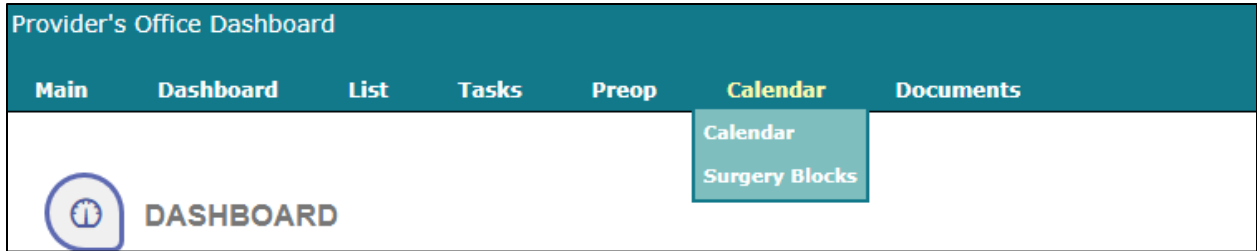
if desired, selecting Booking Form will open another page with the summary of the case. This can then be printed if desired.

PSS Status	PAC Appt. Date	Booking Form?	Patient Alerts	Comor Alerts	Med Alerts
Sent	NA	N	5	0	0
Post Procedural Destination					
Day Surgery (Adult)					

Surgical Blocks

Prior to being able to submit a case to the Care Venue, a Block must be created. These blocks reflect the blocks assigned to the provider by the hospital.

From the Provider's Office Dashboard, select Surgery Blocks. This is where reoccurring blocks can be created.



Use this option to create recurring blocks which are set on a weekly/biweekly basis.

The screenshot shows the 'Create a New Surgery Block' form. It includes fields for 'Start Time:*' (HHMM), 'End Time:*' (HHMM), 'Label', 'Pool' (APU Gyne), and 'Care Venue:*' (SCS APU Gyne-4th Floor). The 'Recurrence Pattern' section has 'Block recurs every:' set to 'week', 'on:' set to 'Monday', and 'Block mode:*' set to a dropdown. The 'Range of Recurrence' section has 'Start Date:*' and 'End Date:*' fields with calendar icons. An 'Add Block' button is at the bottom.

Enter the appropriate information to create a series of blocks. If applicable, select the block mode of compactor or slate. Select Add Block to complete. The blocks will appear on the calendar.

Blocks can be modified directly on the Calendar to delete holidays, etc. Select the tab Current Surgery Blocks to view or modify current blocks.

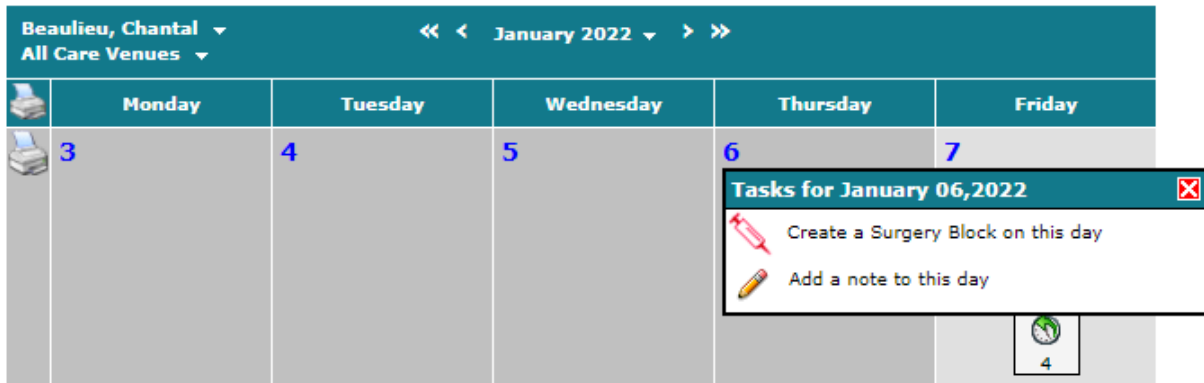
The screenshot shows the 'Current Surgery Blocks' table. It includes a header with 'Create a New Surgery Block' and 'Current Surgery Blocks' tabs. The table has columns for 'Care Venue', 'Provider', 'Start Date', 'End Date', 'Time Slot', 'Day of Week', 'Recurrence', 'Patients Booked', and actions. Two rows are visible:

Care Venue	Provider	Start Date	End Date	Time Slot	Day of Week	Recurrence	Patients Booked	
SCSMAINOR	Dr. Caetano, Helen	29-02-2024	29-02-2024	0800 - 1530	Thursday		0	Edit Delete
SCSMAINOR	Dr. Caetano, Helen	01-03-2024	01-03-2024	0800 - 1400	Friday		0	Edit Delete

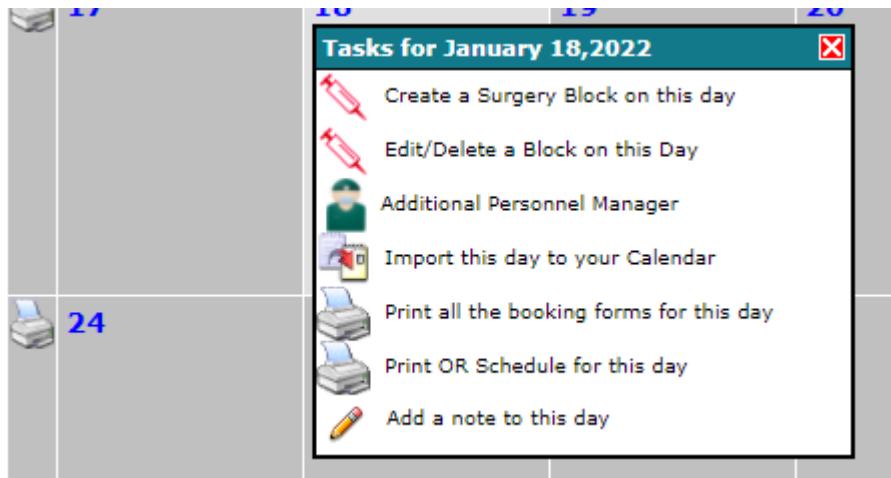
Blocks may also be created directly on the calendar for “one-off” blocks.

To create a new single block or to modify existing blocks, open the calendar. Click on the blue number on the date you wish to create a new block on. A note for the day can also be created this way and is only viewable in the calendar view.

Select Create a Surgery Block on this day and complete the required information.



To modify/delete an existing block, click on the blue number of a day with the block desired. From here, there is a list of actions to select.



Note: Two blocks can be created for one day if needed. For example, a morning OR block and an afternoon ENDO block.

Scheduling a Case

There are three different areas in which a case may be scheduled.

1. Elective Surgical Waiting List – Mini scheduler

From the drop down menu of List, select View List to view the Elective Surgical Waiting List. This is a list of cases with or without surgical dates. In the Current Surg Date column, select the calendar icon.

<input type="checkbox"/>		Tree, Maidenhair	2426815	TONSILLECTOMY (Throat) 30 minutes	56 (2)	WSMAINOR	Y		45	10	NA	
--------------------------	--	----------------------------------	---------	-----------------------------------	--------	----------	---	--	----	----	----	--

This will open what is called the Mini Scheduler. There are two options when the case does not currently have a surgical date. Select either option as desired.

Assign a New Surgery Date

Assign to First Available Slot

Cancel

This will open the Calendar with the created blocks. Select the desired block.

Booking Calendar				
October 2024				
M	T	W	T	F
	1	2	3	4
7	8	9 -7h20m	10	11
14	15	16	17 ✓ -2h55m	18
21	22 -7h20m	23	24	25
28	29	30	31	

✓ The block has been submitted to the O.R.

Click on the BOOK option to select the next available slot.

Scheduler - Thu, Oct 17, 2024

WS Main OR (0730 - 1530)

✔ This block has been submitted.

Time	Appointment Status
0730-1235	OCCUPIED
1235-1240	PENDING CLEAN UP MINUTES
1240-1320	BOOK

[Back](#) [Cancel](#)

Note at the top of the pop up, it is identified if the block has already been submitted. If not, go to block on the Calendar screen and submit when appropriate. Ensure all required attachments have been uploaded to the case prior to submitting the block.

2. Case Details Screen – Mini Scheduler

The case may also be scheduled from the Case Detail screen. Open the case by selecting the blue hyperlink of the patient name from the Elective Surgical Waiting List. Select the Current Surg Date option. This will open the Mini Scheduler as in Option 1.

Account Numbers
No account numbers assigned.

Referral Type	Referral Source	Wait 1 Sys
New Referral	Central Intake	

Diagnosis Category
DISEASES OF THE PHARYNX, TONSILS AND ADENOIDS (Non-Malignant)

Procedure (Add)
[Edit](#): 1. TONSILLECTOMY
 Consented Procedure: TONSILLECTOMY
[Responsibility For Payment](#) : Provincial Government (OHIP)

Wait 2 Priority	Anesth	Attend Short	Provider	Addition
2	Y	N	Dr. Caetano, Helen	

IP/OP
IP

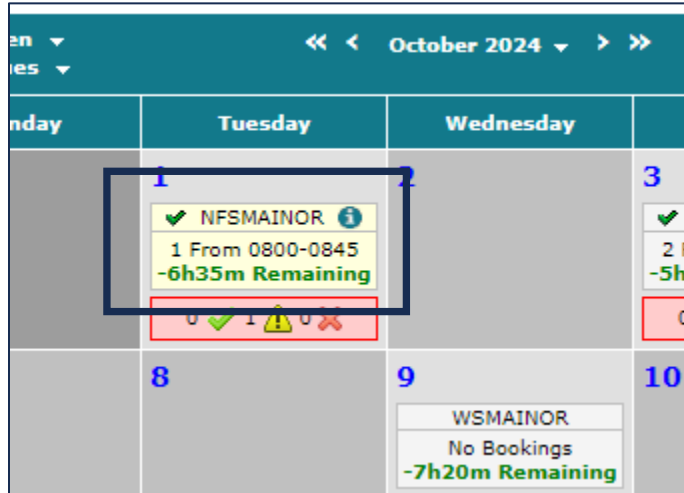
Patient Concerns: (For Office Use Only)

Referral Date	Consult Date	Decision to Treat Date	Target Date	Current Surg Date	Wait 2 S Delay Re
26-08-2024	26-08-2024	26-08-2024	21-10-2024		0

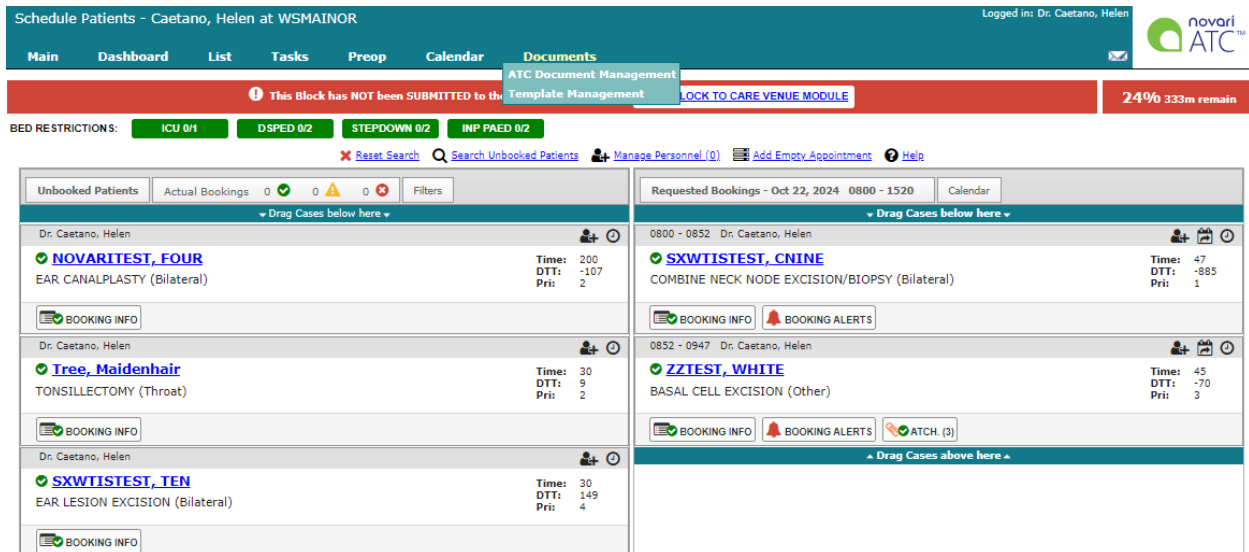
[Send a Message Regarding this Patient](#)

3. Booking Calendar – Drop and Drag Scheduling

Cases may also be scheduled directly from the Booking Calendar. Open the Booking Calendar. Select the required block by clicking on the bookings information on the desired day.



This will open the Schedule Patient screen.

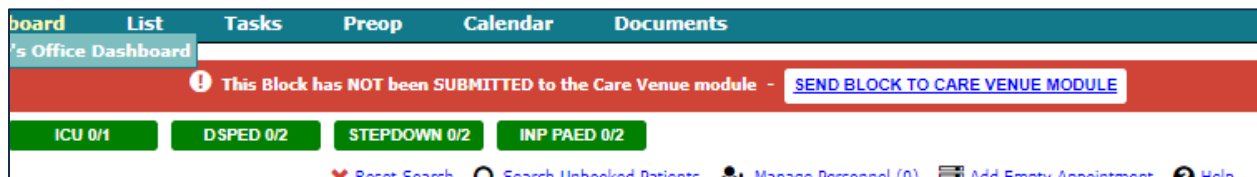


On the right side of the screen will be unscheduled cases. On the left side of the screen are cases allocated to the block. Drop and drag any cases to be included in this block to the left between the blue lines. The blocks shown above has NOT been submitted to the Care Venue. Any changes required should be completed prior to submitting the block whenever possible.

From this view, cases can be removed from the block, reordered and added as needed.

Once the order has been determined and all attachments have been added to the cases, submit the block to the Care Venue.

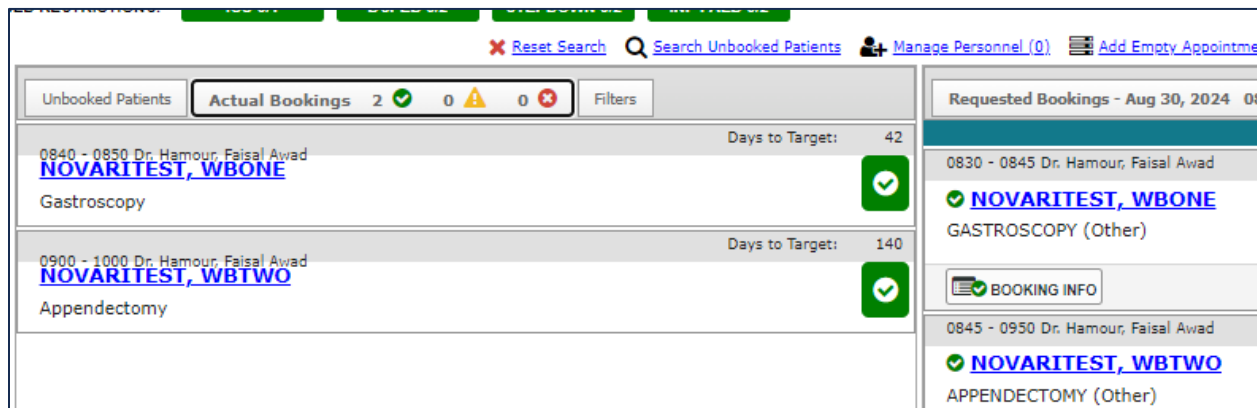
Note: The block can be submitted upon adding one case. Ensure all required documents have been attached to subsequent bookings.



Once the block is submitted, any cases added to this block will automatically be transmitted to the Care Venue.

As the cases are scheduled in the HIS, the [Case Data Verification](#) will happen. This information is comparing what has been submitted in ATC and what has been actually scheduled in the HIS.

Track the progress as needed in the Actual Booking Tab of the Calendar View. This will also represent the order in which the cases are scheduled in the HIS. Adjust any differences in case order as appropriate.




30

✓ NFSMAINOR ⓘ

2 From 0830-0950
-6h40m Remaining

2 ✓ 0 ⚠ 0 ✗

2 from 08:40-10:00
-6h0m Remaining


1

The Booking Calendar view will also show a summary of cases and their status.

- Green check are cases scheduled in the HIS.
- Yellow triangle are cases still to be scheduled.
- Red X are cases where the Case Verification has failed and should be reviewed.

Note: Completed cases will also show on the Booking Calendar view at the bottom of the window represented by a clock with a green arrow. This is the case history of what was completed that day. Click on this for a list of cases.

Completed Cases ✕

Completed cases for **Hamour, Faisal Awad** on **Fri, Aug 30, 2024**.

Name	MRN	Procedure(s)	Provider	Care Venue
NOVARITEST, MAINORFIVE	11053037	BASAL CELL EXCISION (Other) 25 minutes	Hamour, Faisal Awad	NFSMAINOR

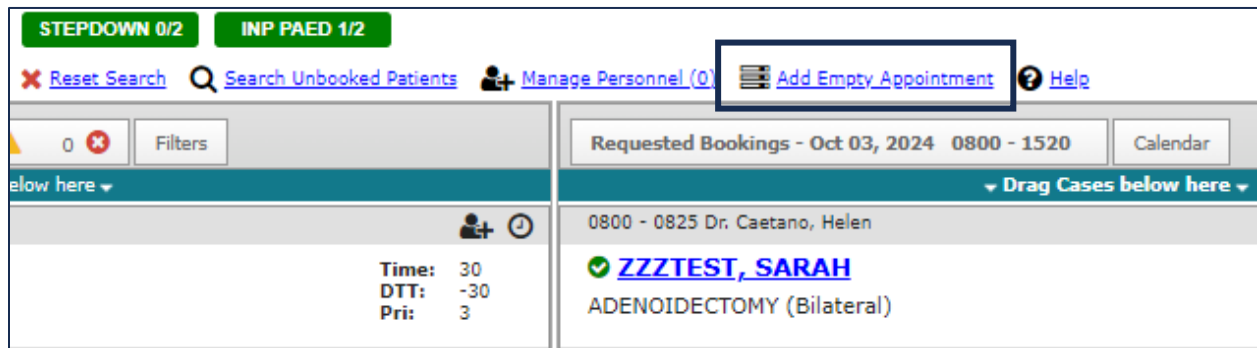
For case details, use the Search Completed Cases Report located in the Reports module.

The cases listed have been completed and no longer exist on the providers list. Follow the directions to find case information if needed.

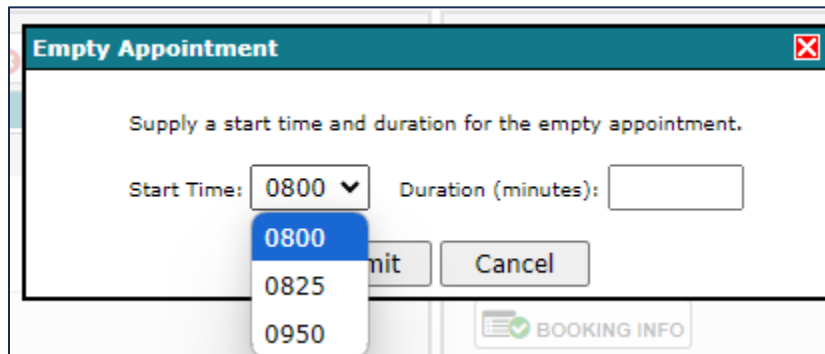
Creating an Empty Appointment

On occasion, it may be necessary to save a block of time for a specific case which is not ready to be scheduled yet. Or, a block of time may need to be allocated for a break, etc.

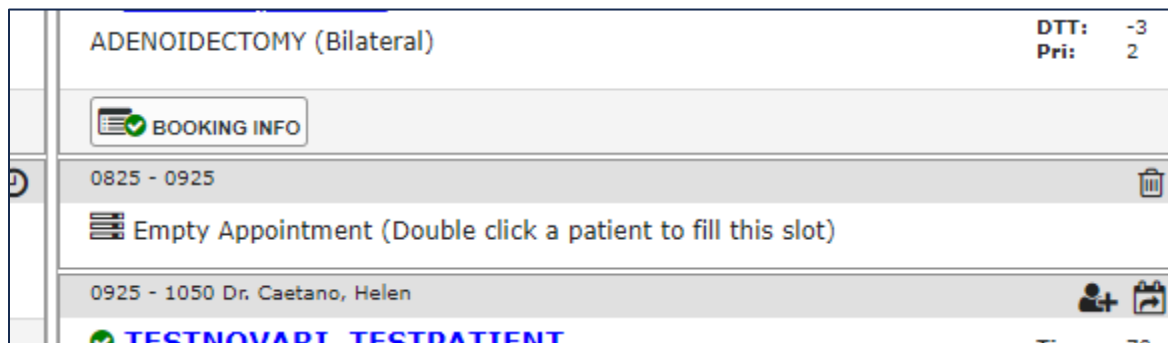
This is possible by creating an Empty Appointment. This can be done on the Calendar view. Select the option of Add Empty Appointment.



Specify when to start the empty appointment as well as the duration needed.



This will create a placeholder in the block day to hold even if this block is submitted to the Care Venue.



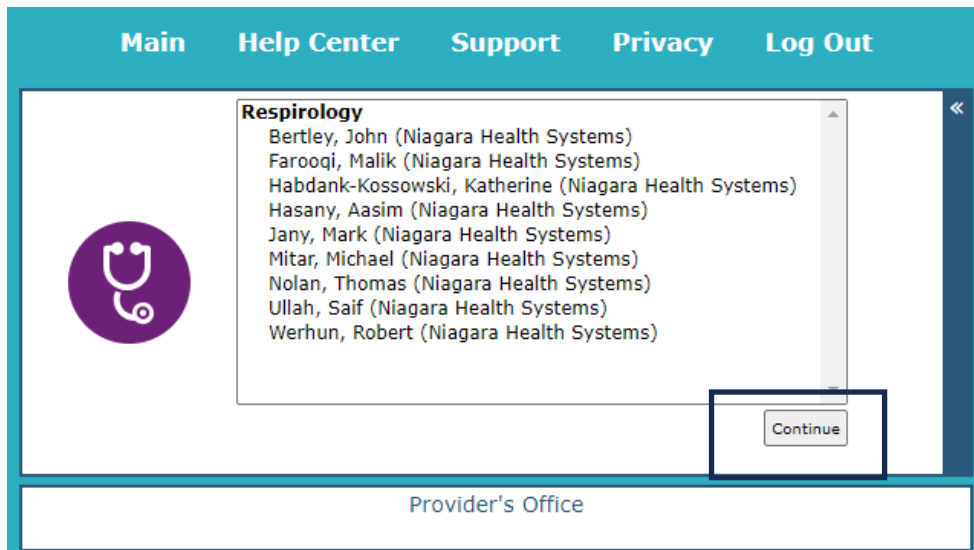
To fill an empty appointment, double click on any case in the Unbooked Patients tab. This empty appointment will also be available through the Mini Scheduler.

Note: Using this option is especially useful when a case is cancelled in the start or middle of the day. Adding an empty appointment may save the need to contact patients of a procedure time change. This will also help mitigate unnecessary change requests to the Care Venue.

Pools

Pools are used to share cases and/or blocks between providers. Depending on permissions, a user may have access to all providers in the pool or only the provider(s) managed outside of the pool. The provider will have two waiting list, one on their own list, one on the pooled list. The pooled case will show in blue as explained later in this section.

To work directly in a pool, select continue. Do not select a provider. This will log directly into the provider pooled wait list only.



Adding a Case to a Pool

Adding a pooled patient is the same as adding a case to the provider list except for selecting Pooled List Type. If logged in directly to the pool, there will be only Pooled List option. This is useful to prevent adding the case to the incorrect wait list.

The screenshot shows a patient registration form with a grey header containing two buttons: "Add Registered Patient" and "Add Unregistered Patient". Below the header is a teal bar with the text "Enter a MRN, HCN, or Name and Birthdate to continue adding a patient. Fields marked '*' are required." The form has three radio button options: "HCN:*" (selected), "Name:", and "MRN:". The "HCN:*" field is a yellow input box. The "Name:" field is a white input box, and the "Birthdate: (DD-MM-YYYY)" field is a white input box with a calendar icon. The "MRN:" field is a white input box. Below the input fields is a "Care Venue:*" dropdown menu with "SCS Endoscopy" selected. To the right of the dropdown is a "List Type:*" section with a radio button selected for "Pooled List". At the bottom of the form is a teal bar with a "Submit" button.

Add the case per standard process.

P SYSTEMTEST, PERIOPSIX [\(edit\)](#)

MRN: 11001652 **Address:** 123 Main St **Home Phone:**
DOB: 01-12-2000 Ontario, ONTARIO **Day Phone:**
Sex: F Canada **Primary Care**
HCN: 2349702387 NONONO **Provider:**

Account Numbers
No account numbers assigned.

Case Details Actions ▾

QuickScreens

Paediatric Relevance of Case Complete

Provider Pool
Respirology

Diagnosis Category	Diagnosis Description
DISEASE OF RESPIRATORY SYSTEM	diagnosis description

Procedure (Add) [View Procedure History](#)

1. BRONCHOSCOPY (SN) Time: 60 Body Site: Other [Notes:](#)
 Consented Procedure: BRONCHOSCOPY (SN)
[Responsibility For Payment](#) : Provincial Government (OHIP)

Wait 2 Priority	ASA Class	Attend Short	Provider	Additional Personnel Manager	Care Venue	PSS Status	PAC Appt. Date	Booking Form?	Patient Alerts
4	3	N	Dr. Bertley, John	0	SCSEND0	Send	NA	N	4

IP/OP	Admission Type	Post Procedural Destination
OP	Endo Outpatient (ADULT)	Day Surgery (Adult)

Patient Concerns: (For Office Use Only) **Notes: (For Office Use Only)**

Referral Date	Consult Date	Decision to Treat Date	Target Date	Current Surg Date	Wait 2 System Delay Reasons	Procedure Audits (Cancellations)	Documents	Attachments	Adjusted Days on List	Adjusted Days to Target	Dates Affecting Readiness To Treat
		07-10-2024	07-04-2025		0	0	0	0	7	174	

The case screen will be blue to represent a pooled patient. There will be a blue “P” beside the patient demographics. When logged into the non-pooled waiting list, select the Show Pooled Patients to show both case types on one list.

Show me: Patients 1- 2 of 2

▾ Show Pooled Patients First Prev **1** Next

▾ Patients per page: ▾

	Cancellations		Name	MRN	Procedure	Target Days (Pri)	Care Venue	
<input type="checkbox"/>	●		SXWTISTEST, CNINE	11053235	BRONCHOSCOPY (SN) (bronchioli) 60 minutes	84 (3)	WSEND0	
<input type="checkbox"/>	●		SYSTEMTEST, PERIOPSIX	11001652	BRONCHOSCOPY (SN) (Other) 60 minutes	182 (4)	SCSEND0	

Depending on permissions and process, this case may be scheduled by a pool administrator or the same provider originally entering the case.

Scheduling Pooled Case to Pool Block

The user may be logged into the provider wait list in a non-pooled mode and toggle between the calendars if desired. It is easier to log directly into the pool as mentioned previously.

If applicable, toggle between the calendar to select the Pool calendar. The example below shows the user logged into Dr. Bertley's wait list as well as the Pool. All blocks are normally set up by the hospital for the providers. Pools can be in multiple Care Venues.

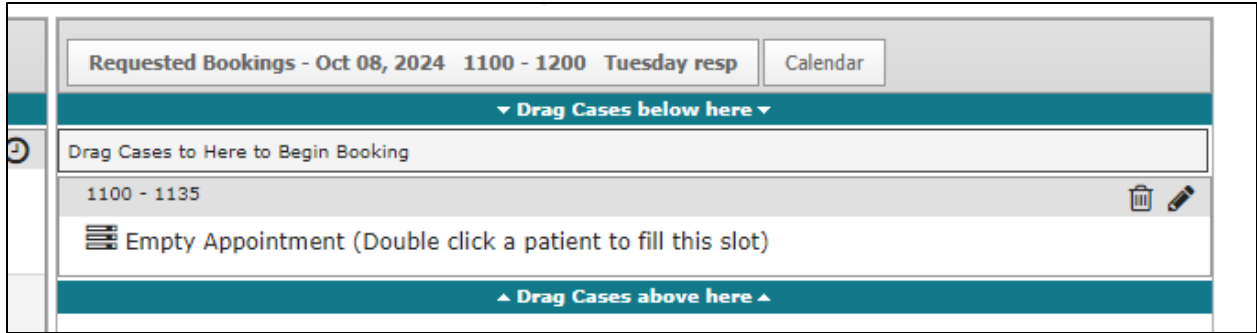
The screenshot shows a scheduling interface for Dr. Bertley, John, for October 2024. A dropdown menu titled "Select a Care Venue" is open, showing options: "SCS Endoscopy", "WS Endoscopy", and "All Care Venues". The calendar displays blocks for different days, including "No Bookings Pool Time" and "SCS Resp SCSENDO". A status bar at the bottom indicates "0" for various metrics.

Select the appropriate Care Venue to view available blocks. The blocks are blue representing it is a pooled block. Do NOT modify or create blocks if set up by the hospital.

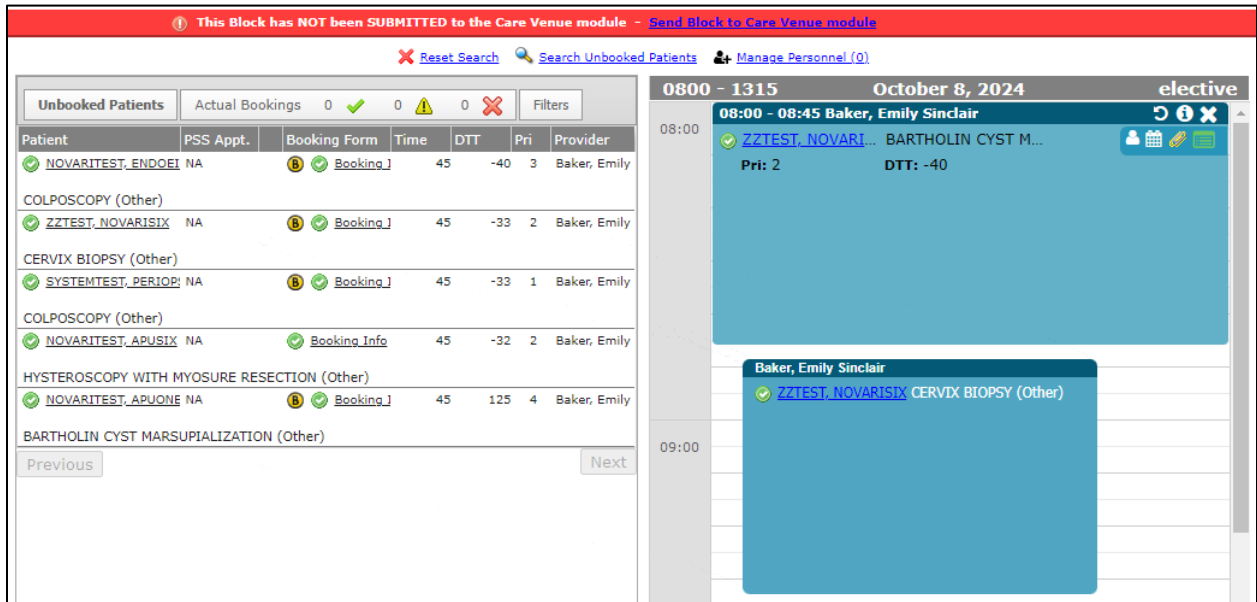
Open the block to schedule. Drop and drag cases to the Requested Booking section. Process may include submitting the block when the first case is scheduled.

The screenshot shows a scheduling interface with a "Requested Bookings" section for October 08, 2024, 1100 - 1200, Tuesday resp. The interface displays two cases: "SYSTEMTEST, PERIOPSIX" and "ZZTEST, CHANTALLE", both for BRONCHOSCOPY (SN) (Other). The interface includes a "SEND BLOCK TO CARE VENUE MODULE" button and a "58% 25m n" indicator.

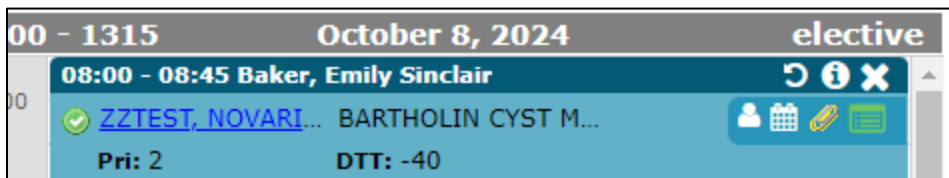
Pools may be scheduled in all three different ways as the standard process. Cancel Reschedule is the same process. Note that a cancel reschedule in a pool will result in an empty appointment automatically created depending on set up of the Pool. To use an empty appointment from the Schedule Patients Calendar view, double click on the case



Some Pools calendars may be set up in a Slate Mode. This allows the user to drop and drag the case to the appropriate time on the calendar block. When cancel reschedule on a slate block, the cases before and after are not affected and therefore do not require an empty appointment to be created. Slate mode is only noticeable on the Schedule Patients Calendar view. The Mini Scheduler process is the same as non-slate or compactor mode.



Ensure all cases are scheduled without empty space between cases. Slate mode has different icons on the case. Hover over each of the symbols for prompts. The X is to cancel the case. Cancel Reschedule may be done using the Mini Scheduler as well.



Process may include submitting the block when the first case is scheduled.

Women's and Babies Pool Process

Log directly into the Pool when possible. This will help streamline the process. Note that some providers may be added to several different Pools. See the Pools section in this document to navigate between pools. [Pools](#)

Adding the Case to Women's and Babies Pool Wait List

When adding the case, select the Care Venue of SCS Women's and Babies LD and Pooled List.

The screenshot shows a web form for adding a patient. At the top, there are two buttons: "Add Registered Patient" and "Add Unregistered Patient". Below this is a teal header with the text: "Enter a MRN, HCN, or Name and Birthdate to continue adding a patient. Fields marked '*' are required." The form has three radio button options for patient identification: "HCN:*" (selected), "Name:", and "MRN:". The "HCN:*" field is highlighted in yellow. Below these are fields for "Birthdate: (DD-MM-YYYY)" with a calendar icon. At the bottom, there is a "Care Venue:*" dropdown menu set to "SCS Womens and Babies LD" (highlighted in yellow) and a "List Type:*" section with a radio button for "Pooled List" (selected). A "Submit" button is located at the bottom right.

Add the case per standard process. There will be two procedures which can be scheduled. Each Caesarean Section will be scheduled for 60 minutes time slot.

The screenshot shows a "Procedure(s) Add" form. The "Procedure 1 Provider:" dropdown is set to "Baker, Emily Sinclair". Under "Procedure 1: *", there are "Search" and "QuickPick" buttons, and radio buttons for "Short List" (selected) and "Full List". The procedure name is "CAESAREAN SECTION" (dropdown), the code is "2563481021" (text field), and the "Est. Procedure Time: *" is "60" (text field). Below this, "Consented Procedure 1: *" is also "CAESAREAN SECTION". The "Body Site: *" section has a radio button for "Other - specify(optional):" (selected) and an empty text field. To the right is a "Procedure Notes:" text area with the text "Anything need special about this procedure". At the bottom, "Responsibility For Payment: *" is set to "Provincial Government (OHIP)".

If required, add a secondary procedure of Tubal Ligation. This procedure time is included in the 60 minutes for the Caesarean Section. Do not increase the time.

Procedure 2: * Short List Full List

Est. Procedure Time: *
mins
Default: 0
(Apply)
Setup: 0 /
Cleanup: 0

Consented Procedure 2: *

Continue to add the case as standard process. If an Anesthesia Consult is required, add this in the PSS screen.

Add a PSS Preoperative Activity

OnTrac Review

W&B Anesthesia Consult

An OnTrac review may also be requested for optimization of patients with Anemia, bleeding disorders, etc.

Select OK to add the case to the waiting list. Since the case is added to a Pool, it will appear in blue.

P SYSTEMTEST, PERIOPSIX [\(edit\)](#)

MRN: 11001652 Address: 123 Main St Home Phone:
 DOB: 01-12-2000 Ontario, ONTARIO Day Phone:
 Sex: F Canada Primary Care
 HCN: 2349702387 NONONO Provider:

Account Numbers
No account numbers assigned.

Case Details Actions

QuickScreens

Paediatric Relevance of Case Complete

WTIS Gynaecologic Surgery Complete

Provider Pool
Womens and Babies

Diagnosis Category **Diagnosis Description**

PREGNANCY TWIN delivery

Procedure (Add) [View Procedure History](#)

1. CAESAREAN SECTION
Consented Procedure: CAESAREAN SECTION Time: 60 Body Site: Other Notes: Anything need special about this procedure
[Responsibility For Payment](#) : Provincial Government (OHIP)

2. TUBAL LIGATION
Consented Procedure: TUBAL LIGATION Time: 0 Body Site: Other Notes:
[Responsibility For Payment](#) : Provincial Government (OHIP)

Wait 2	Priority	Anesth	Attend Short	Provider	Additional Personnel Manager	Care Venue	PSS Status	PAC Appt. Date	Booking Form?	Patient Alerts	Comor Alerts	Med Alerts
CB	Y	N		Dr. Baker, Emily Sinclair	0	SCSW&BLD	Surf		N	4	0	0

IP/OP **Admission Type** **Post Procedural Destination**

IP Admit Day Of Surgical Inpatient

Patient Concerns: (For Office Use Only) **Notes: (For Office Use Only)**

Referral Date	Consult Date	Decision to Treat Date	Target Date	Current Surg Date	Wait 2 System Delay Reasons	Procedure Audits (Cancellations)	Documents	Attachments	Adjusted Days on List	Adjusted Days to Target	Dates Affecting Readiness To Treat
		14-10-2024	14-10-2025		0	0	0	0	1	363	

Women's and Babies Anesthesia Consult Process

IMPORTANT: Anesthesia consults for the Women's and Babies Care Venue will be scheduled by the providers office. This can be done at the time of adding the case to the wait list or afterwards.

To schedule the Anesthesia Consult, open the Case Details screen of the patient. Select the calendar icon in the PAC Appt Date option. This will open the PSS Appointment Scheduling screen to schedule the consult.

PSS Status	PAC Appt. Date	Booking Form?
Send		N
Post Procedural Destination		

If there is no procedure date (case is not on a submitted block), the system will not recommend a window of time to schedule. Select Schedule Manually.

PSS Appointment Scheduling - SYSTEMTEST, PERIOPSIX

Unscheduled PSS Appointments

W&B Anesthesia Consult **Completed:**
Not Completed No recommendation available. [Schedule Manually](#)

[View in PSS](#) [Exit](#)

This will open the schedule appointment window. Select a date to see available slots.

SYSTEMTEST, PERIOPSIX - Schedule appointment - W&B Anesthesia Consult

Scheduling window: 1 - 365 days before OR

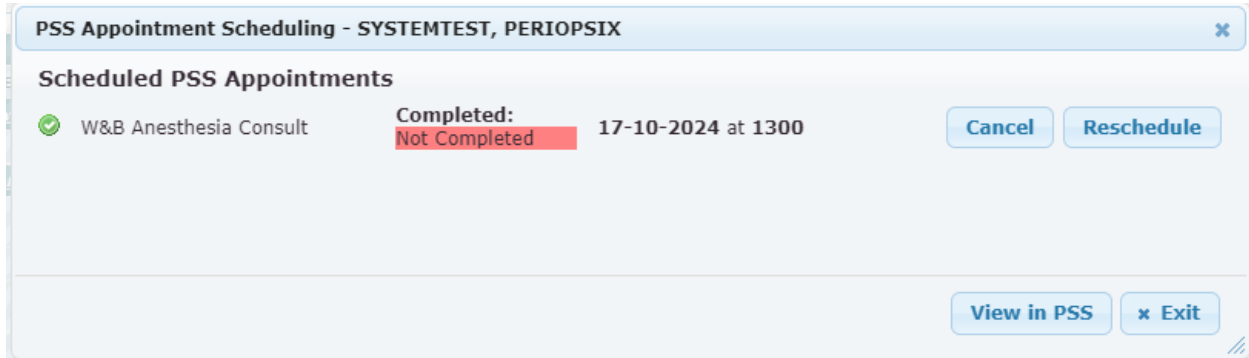
October 2024

Su	Mo	Tu	We	Th	Fr	Sa
		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		

Selected Date: 17-10-2024

		WBACONSULT
		Slot #1
1300	1300	Book
	1305	
	1310	
	1315	
	1320	
	1325	
1330	1330	Book
	1335	
	1340	
	1345	
	1350	
	1355	

Select Book on desired option. The appointment date and time will be confirmed in this window. Ensure the patient is available and informed of this date and time.



If the patient needs to reschedule the Anesthesia consult, follow the same process and select Reschedule. This will allow to select a new date and time.

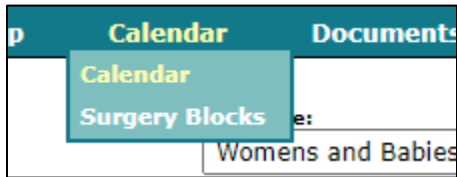
Note that this process can also be accessed from the Elective Surgical Waiting List, in the PSS Status column. Click on the calendar from here and follow the same directions.

	Cancellations		Name	MRN	Procedure	Target Days (Pri)	Provider	Care Venue	Anesth	Next Available	Current Surg Date	Adjusted Days on List	Adjusted Days to Target	PSS Status
<input type="checkbox"/>			SYSTEMTEST, WBONE	100000143	CAESAREAN SECTION (Other) 45 minutes	365 (CB)	Dr. Baker, Emily Sinclair	SCSW&BLD	Y		13-08-2024	196	168	

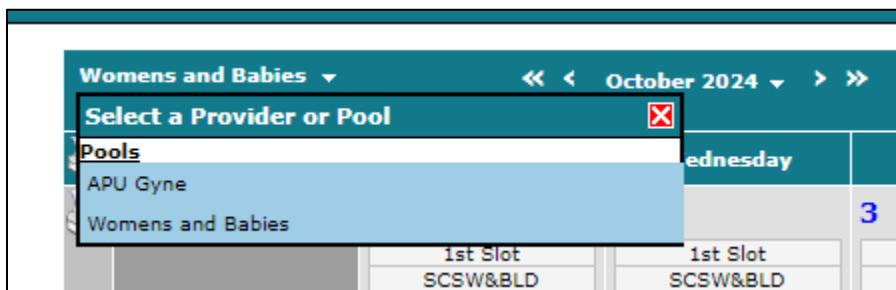
Providers offices are responsible to schedule and maintain any Anesthesia Consult. OnTrac requests are processed by Niagara Health only.

Women's and Babies Scheduling Case Process

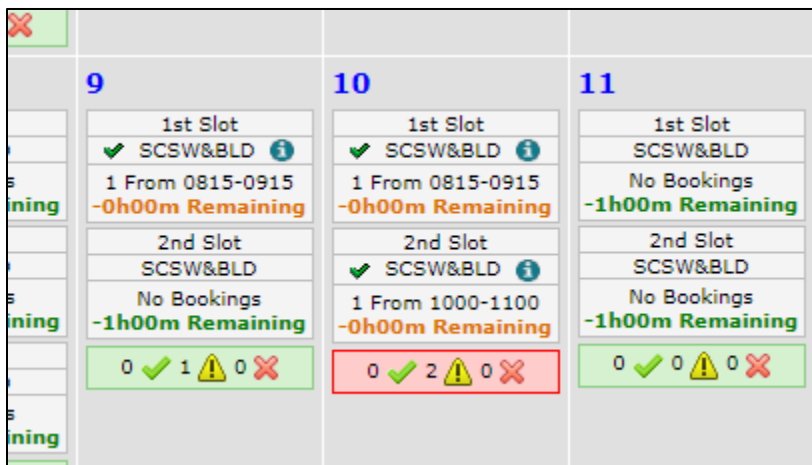
When ready to select a procedure date, go to the drop-down menu Calendar. Remember all available blocks have already been created. **Do not create new blocks.**



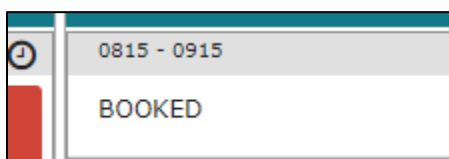
If the provider has access to more than one Pool, use the drop-down menu to select the appropriate option.



This will show the calendar with the available dates and blocks (time). Select an empty block to request.



Cases can only be seen with the appropriate permissions. Blocks will show BOOKED if another provider has already selected that date/time block.



Drag the case to the right side of the calendar.

The screenshot displays a software interface for managing medical appointments. At the top, a red banner contains the text "SEND BLOCK TO CARE VENUE MODULE". Below this, there are navigation links: "Unbooked Patients", "Add Empty Appointment", and "Help". The main area shows a "Requested Bookings" section for "Oct 09, 2024" at "1000 - 1100" in the "2nd Slot". A teal bar with a downward arrow says "Drag Cases below here". Below this, a booking card is shown for "1000 - 1100 Dr. Baker, Emily Sinclair". The procedure is "ZZTEST, NODIRECTORY" (marked with a green checkmark) and "CAESAREAN SECTION (Other)". A red box on the left lists "60", "363", and "CB". On the right, details include "Time: 60", "DTT: 307", and "Pri: CB". At the bottom of the card are buttons for "BOOKING INFO" and "BOOKING ALERTS", and a teal bar with an upward arrow says "Drag Cases above here".

To confirm this case, send the block to the Care Venue Module.

Cancel reschedule process is the same as the standard process if needed.

APU Gyne Pool Process

Log directly into the Pool when possible. This will help streamline the process. Note that some providers may be added to several different Pools. See the Pools section in this document to navigate between pools. [Pools](#)

Adding the Case to APU Gyne Pool Wait List

Select the SCS APU Gyne-4th Floor Care Venue and Pooled List.

The screenshot shows a web form for adding a registered patient. At the top, there are two tabs: "Add Registered Patient" (selected) and "Add Unregistered Patient". Below the tabs is a blue header with the text: "Enter a MRN, HCN, or Name and Birthdate to continue adding a patient. Fields marked "*" are required". The form contains several input fields: "HCN:*" with a yellow input box; "Name:" with a white input box; "Birthdate: (DD-MM-YYYY)" with a white input box and a calendar icon; "MRN:" with a white input box; "Care Venue:*" with a dropdown menu showing "SCS APU Gyne-4th Floor" (highlighted in blue) and "SCS Womens and Babies LD"; and "List Type:*" with a radio button selected for "Pooled List". A "Submit" button is located at the bottom right of the form.

The APU Gyne blocks represent cases in which providers have consulted with the patient however the next available provider will complete the case. Therefore, when adding the case into the system, select the provider who will perform the case from the drop-down menu.

The screenshot shows the "Pool" and "Provider" selection sections of the form. The "Pool:" dropdown is set to "APU Gyne". The "Provider:" dropdown is open, showing a list of providers under the "Gynecology" service category. The selected provider is "Dr. Baker, Emily Sinclair". Other providers listed include "Dr. Dalton, Elise Marie", "Dr. Goswami, Nadiya (locum)", "Dr. Machado, Melissa", "Dr. Macmillan, Karen Diane", and "Dr. Mohan, Uthra". The "Service:" dropdown is set to "Gynecology".

Continue to select all appropriate options as in the standard process. There are limited procedures in the drop-down menu and all are set at 45 minutes total.

The APU Gyne Care Venue is reportable to WTIS and therefore requires the Referral information as the same as the Main ORs. Select the appropriate options.

In the Referring Provider field, enter the name of the provider who consulted with the patient at the time of decision to treat. This is a required field.

Referring Provider: *

If a secondary procedure is required, add this in the standard process. Update the time of the second procedure to zero (0) minutes. The total time of the case should always be 45 minutes total.

Procedure(s) Add

Procedure 1 Provider: * Baker, Emily Sinclair

Procedure 1: * Short List Full List

CERVIX BIOPSY mins
Default: 45
[\(Apply\)](#)
Setup: 0 / Cleanup: 0

Consented Procedure 1: *
CERVIX BIOPSY

Body Site: *
 Other - specify(optional):

Procedure Notes:
First Procedure

Responsibility For Payment: * Provincial Government (OHIP)

Procedure 2 Provider: * Baker, Emily Sinclair

Procedure 2: * Short List Full List

CERVIX CONE BIOPSY mins
Default: 45
[\(Apply\)](#)
Setup: 0 / Cleanup: 0

Consented Procedure 2: *
CERVIX CONE BIOPSY

Once all required fields have been entered, select Submit. This has now added the case to the APU Gyne Pool Wait List.

Again, this case will show in Blue as it is a Pooled case.

P SYSTEMTEST, PERIOPSIX (edit)						Case Details Actions ▾					
MRN: 11001652 Address: 123 Main St Home Phone: DOB: 01-12-2000 Ontario, ONTARIO Day Phone: Sex: F Canada Primary Care HCN: 2349702387 NONONO Provider:						QuickScreens Paediatric Relevance of Case Complete <input type="button" value="Edit"/> WTIS Gynaecologic Surgery Complete <input type="button" value="Cannot Edit"/>					
Account Numbers No account numbers assigned.											
Provider Pool APU Gyne											
Referral Type		No Referral/Follow-Up Reason		Referring Provider		Wait 1 System Delay Reasons		Wait 1 Priority		Adjusted Wait 1 Days Waited	
No Referral/Follow-Up		Existing Patient - New Condition		Dr. G		0					
Diagnosis Category						Diagnosis Description					
OTHER GYNECOLOGICAL DIAGNOSES (Non-Malignant)						diagnosis description					
Procedure (Add)										View Procedure History	
Edit: 1. COLPOSCOPY Consented Procedure: COLPOSCOPY				Time: 45		Body Site: Other		Notes:			
Responsibility For Payment : Provincial Government (OHIP)											
Wait 2 Priority	ASA Class	Anesth	Attend Short	Provider	Additional Personnel Manager	Care Venue	PSS Status	PAC Appt. Date	Booking Form?	Patient Alerts	
2	1	Y	N	Dr. Baker, Emily Sinclair	0	SCSAPU	Send	NA	N	3	
IP/OP					Admission Type		Post Procedural Destination				
OP					Day Surgery (Adult)		Day Surgery (Adult)				
Patient Concerns: (For Office Use Only)						Notes: (For Office Use Only)					
Decision to Treat Date	Target Date	Current Surg Date	Wait 2 System Delay Reasons	Procedure Audits (Cancellations)	Documents	Attachments	Adjusted Days on List	Adjusted Days to Target	Dates Affecting Readiness		
08-10-2024	05-11-2024		0	0	0	0	7	20	To Treat		

Summary:

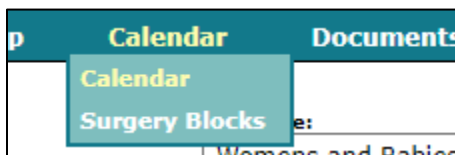
Provider drop-down menu = Provider performing the procedure
 Provider entering the case = Referring Provider

APU Gyne Scheduling Case Process

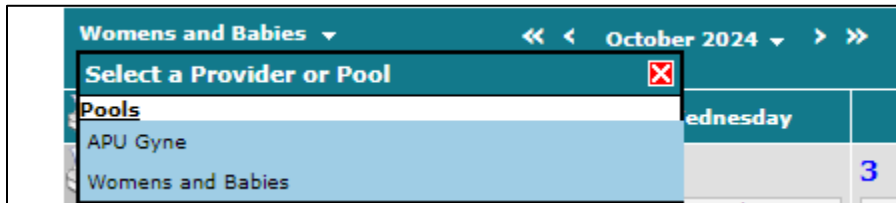
The permissions in the APU Gyne pool are set for all providers to have access to all cases in the Wait List. When viewing the Elective Surgical Waiting List, the cases will show with the assigned provider in the Provider column.

	Cancellations	Name	MRN	Procedure	Target Days (Pri)	Provider	Care Venue	Anesth	Next Available	Current Surg Date	Adjusted Days on List	Adjusted Days to Target	PSS Status	
<input type="checkbox"/>		NOVARITEST, ENDOSEVEN	11053112	DILATION AND CURETTAGE WITH TERMINATION (Other) 30 minutes	14 (2)	Dr. Baker, Emily Sinclair	SCSAPU	Y		15-10-2024	69	-55	NA	
<input type="checkbox"/>		SYSTEMTEST, WRONE	100000143	COLPOSCOPY (Other) 20 minutes	84 (3)	Dr. Zefkic, Katrina Elise	SCSAPU	N		29-10-2024	133	-49	NA	
<input type="checkbox"/>		NOVARITEST, ADUTHREE	11053246	HYMENECTOMY (Other) 45 minutes	14 (2)	Dr. Baker, Emily Sinclair	SCSAPU	Y		27-08-2024	57	-43	NA	
<input type="checkbox"/>		ZZTEST, NOVARININE	11002858	DILATION AND CURETTAGE (Other) 30 minutes	28 (2)	Dr. Wang, James Chian-Ming	SCSAPU	Y		29-10-2024	69	-41	NA	
<input type="checkbox"/>		ZZTEST, NOVARIFIVE	11002854	BARTHOLIN CYST MARSUPIALIZATION (Other) 45 minutes	28 (2)	Dr. Baker, Emily Sinclair	SCSAPU	Y		08-10-2024	69	-41	NA	

When ready to select a procedure date, go to the drop-down menu Calendar. Remember all available blocks have already been created. **Do not create new blocks.**



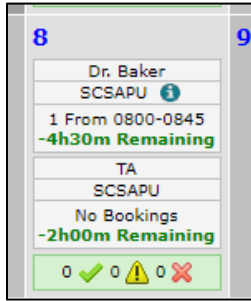
If the provider has access to more than one Pool, use the drop-down menu to select the appropriate option.



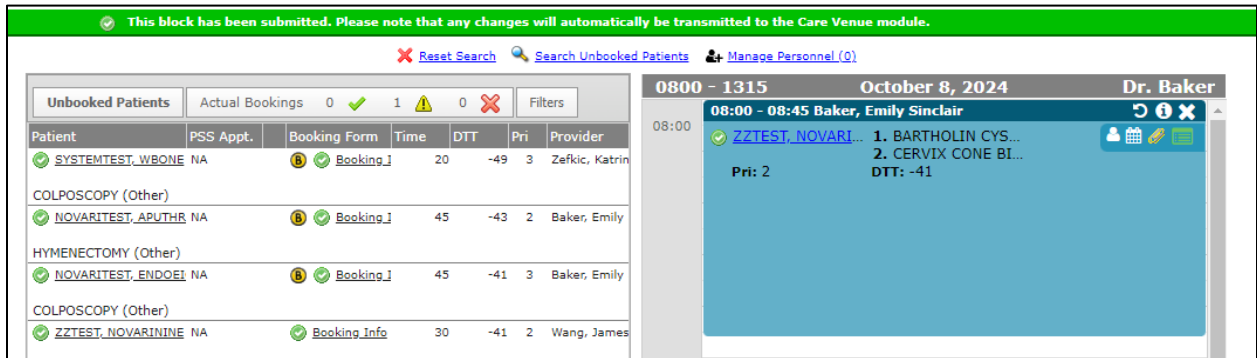
This will show the calendar with the next available date. Select the appropriate block to schedule into. There are two separate blocks in the APU Gyne pool. The morning block is for the shared scheduling of cases.

IMPORTANT: Gyne APU blocks are created using Slate Scheduling. This allows cases to be added and removed without affecting other cases. Do NOT change the order of cases without first attaining permission to do so. The providers have already informed the patient of the date and time to attend for the procedure.

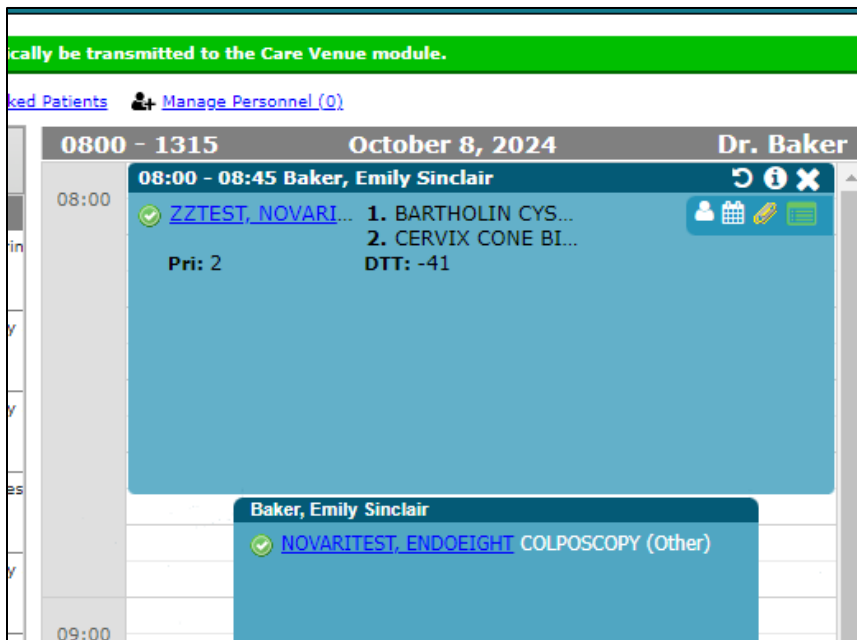
Navigate to the first block of the day and open.



If there are existing cases, they will already show in the block. Add cases directly beneath the previous one without leaving any additional time. All cases with any provider will show in the Unbooked Patients tab.



Drag the required case to beneath the previous one.



IMPORTANT: If this is the first case of the block, once the case is scheduled, submit the block to the APU Gyne Care Venue

This Block has NOT been SUBMITTED to the Care Venue module - [Send Block to Care Venue module](#)

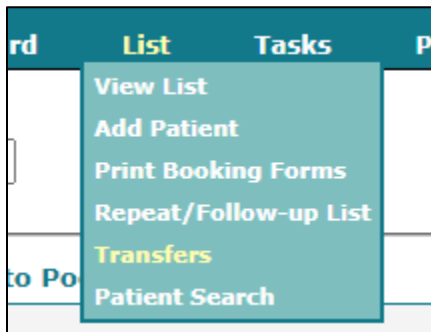
Any additional cases placed on this block will automatically be sent to the Care Venue.

If a case is listed under the incorrect provider OR needs to be updated to a new provider for some reason, transfer the responsibility to the new provider.

View the Elective Surgical Waiting List to identify which case needs to be transferred to the new provider.

Select the double green arrows in the last column to transfer to the new provider within the APU Gyne Pool.

Go to List and select Transfers to accept the transfer.



Pooled Case Responsibility Transfer											
Patient Name	Diagnosis Category	Procedure	Pri	Responsible Provider	Pool	Care Venue	To Provider	To Pool	To Care Venue	Request Status	
NOVARITEST, APUTWO	OTHER MALIGNANT TUMOUR	1. CERVIX CONE BIOPSY (Other) 45 minutes 2. INTRA UTERINE DEVICE INSERTION (Other) 0 minutes	2	Baker, Emily Sinclair	APU Gyne	SCSAPU	Dalton, Elise Marie	APU Gyne	SCSAPU	Pending Accept Cancel	
SYSTEMTEST, PERIOPSIX	OTHER GYNECOLOGICAL DIAGNOSES (Non-Malignant)	COLPOSCOPY (Other) 45 minutes	2	Baker, Emily Sinclair	APU Gyne	SCSAPU	Dalton, Elise Marie	APU Gyne	SCSAPU	Pending Accept Cancel	

This case will then be shown in the accepting provider's name and responsibility.

Note that cases can be transferred to a providers list but this is actually the personal wait list of the provider and not inside the pool. If the provider needs to complete the case in the Main OR, transfer the case to the provider list. Accept the transfer and update the Care Venue from APU Gyne to Main OR as needed.

Canceling and Rescheduling

As there are three ways to schedule a case, there are three corresponding ways to cancel reschedule a case. The process of removing a case from a submitted block is called “cancel reschedule” as the case WILL be rescheduled again on a later date.

If a case will no longer be required and the case is on a submitted block, cancel reschedule the case and remove from the wait list using the information listed in Case Details Actions, Remove from Wait List [Case Details Actions](#)

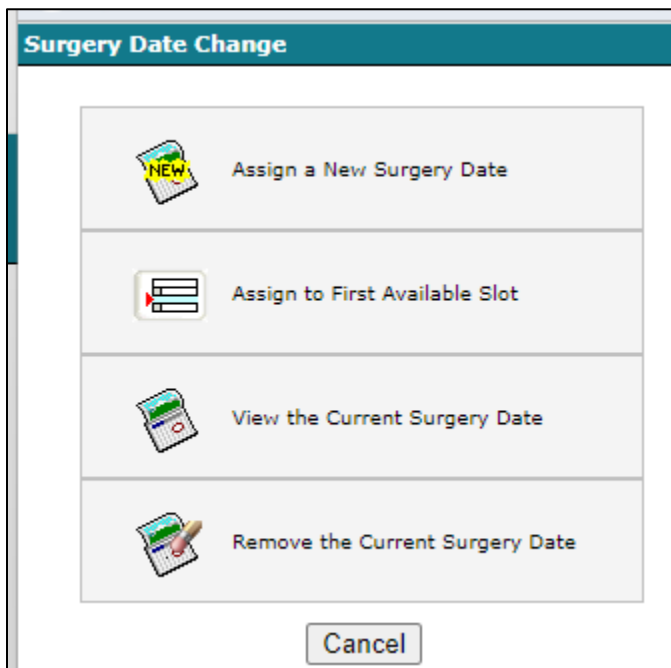
1. Elective Surgical Waiting List – Mini scheduler Cancel Reschedule

From the drop down menu of List, select View List to view the Elective Surgical Waiting List. In the Current Surg Date column, select the current requested procedure date. If there is a green checkmark next to the date, this case HAS been submitted to the Care Venue. If there an additional green checkmark or red X, the case has been scheduled in the HIS as well.

Only cases submitted to the Care Venue will require a cancellation reason.

	ZZTEST, NOVARIFIFTEEN	11002864	ADENOIDECTOMY (Right) 20 minutes	56 (2)	SCSMINOR	N	19-08-2024		
--	---	----------	--	--------	----------	---	------------	--	--

Selecting the date will open the Mini Scheduler. There will be more options now. Select the appropriate option as shown below. If you have new date for the case, select the “assign a new surgery date” option to cancel reschedule in one step. If no new date is known, select “remove the current surgery date”.



Since this case has been submitted to the Care Venue, the system will prompt for a reschedule reason.

Select the appropriate reason from the drop down menu. The option to create an empty appointment is also available. See [Creating an Empty Appointment](#)

2. Case Details Screen – Mini Scheduler Cancel Reschedule

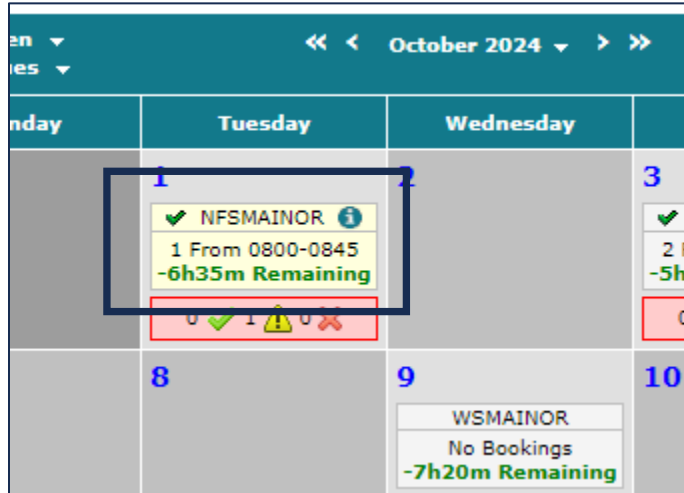
The case may also be cancel rescheduled from the Case Detail screen. Open the case by selecting the blue hyperlink of the patient name from the Elective Surgical Waiting List. Select the Current Surg Date option. This will open the Mini Scheduler as in Option 1.

Account Numbers					
No account numbers assigned.					
Referral Type	Referral Source	Wait 1 Sys			
New Referral	Central Intake				
Diagnosis Category					
DISEASES OF THE PHARYNX, TONSILS AND ADENOIDS (Non-Malignant)					
Procedure (Add)					
Edit: 1. TONSILLECTOMY Consented Procedure: TONSILLECTOMY Responsibility For Payment : Provincial Government (OHIP)					
Wait 2 Priority	Anesth	Attend Short	Provider	Addition	
2	Y	N	Dr. Caetano, Helen		
IP/OP					
IP					
Patient Concerns: (For Office Use Only)					
Referral Date	Consult Date	Decision to Treat Date	Target Date	Current Surg Date	Wait 2 S Delay Re
26-08-2024	26-08-2024	26-08-2024	21-10-2024		0
Send a Message Regarding this Patient					

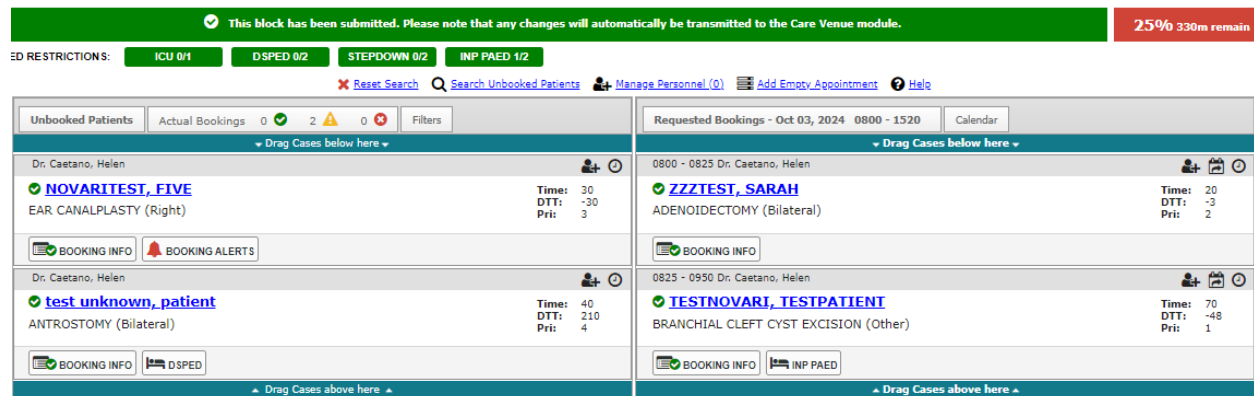
Follow the same directions as in Option 1.

3. Booking Calendar – Drop and Drag Cancel Reschedule

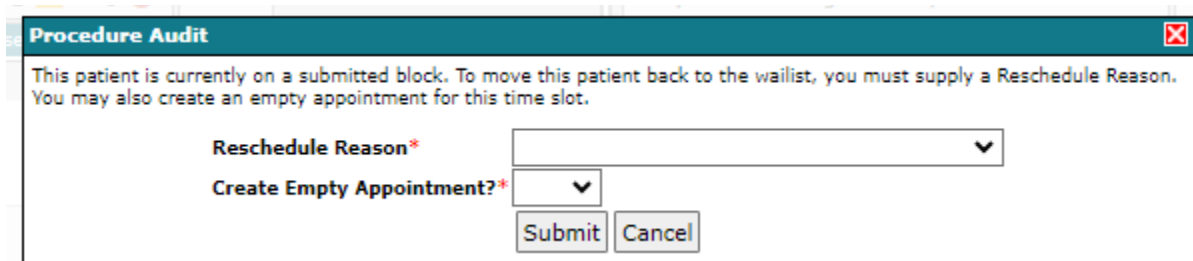
Cases may also be cancel rescheduled directly from the Booking Calendar. Open the Booking Calendar. Select the required block by clicking on the bookings information on the desired day.



This will open the Schedule Patient screen.



Simply drag the cases from the right side of the screen to the left. Since this case has been submitted to the Care Venue, the system will prompt for a reschedule reason.





Select the appropriate reason from the drop down menu. The option to create an empty appointment is also available. See [Creating an Empty Appointment](#)

Scanning and Uploading Attachments

ATC facilitates submitting required patient or case documentation to the Care Venue. This is accomplished by either scanning directly into ATC or uploading PDF files from a saved place on the computer.





For additional information or instructions, refer to the Novari ATC Scanning and Uploading Guide located in the Help Center.

Select the paperclip icon to attach documents to a case. This can be found in the Case Details screen.

SXWTISTEST, CNINE [\(edit\)](#)  


MRN: 11053235 **Address:** 444 PEN STREET
DOB: 01-01-2020 WELLAND, ONTARIO
Sex: F Canada

Once a case has any attachment added, this will be viewable in the Elective Surgical Waiting List as well as Case Details. Select the paperclip icon to open or hover over to see how many attachments are already added.

			TESTPATIENT, HOLLIE	11001810	BASAL CELL EXCISION (Other) 25 minutes
			LYMPHOMA	11002606	LYMPH NODE - AXILLARY BIOPSY (Left) 35 minutes

3 attachments

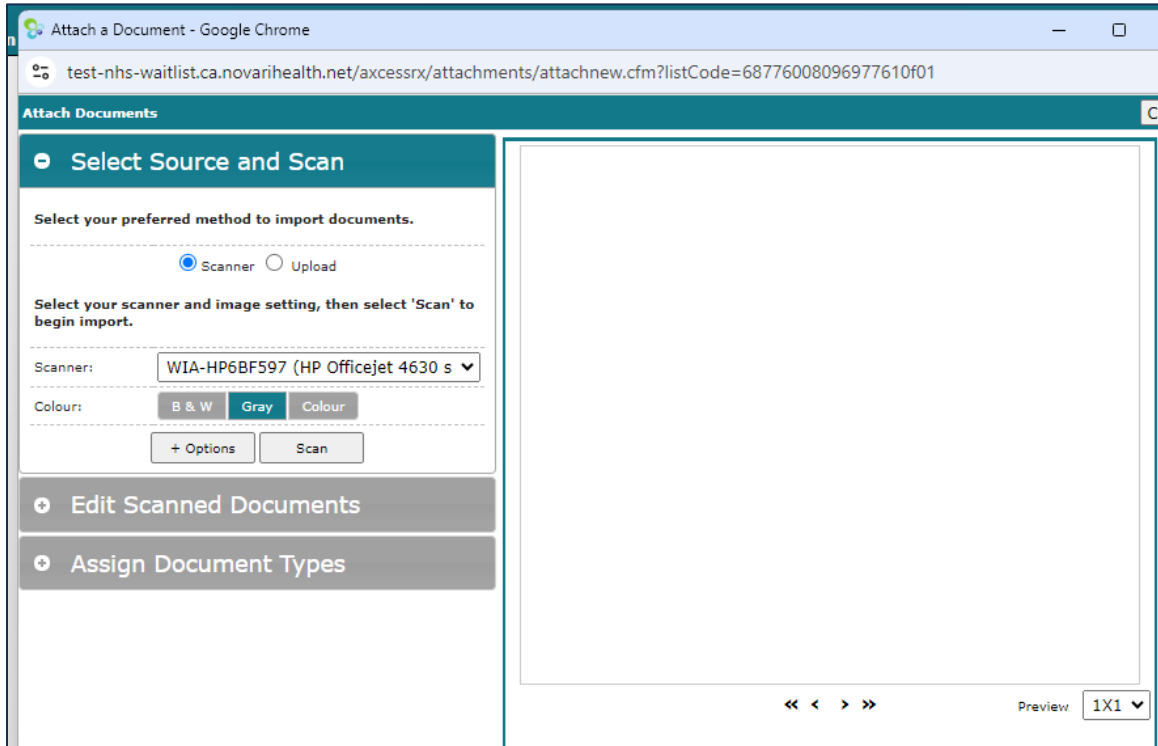
From here, actions can be executed for the attachments. Notice the attachment cannot be deleted but can be inactivated if attached incorrectly.

TESTPATIENT, HOLLIE 

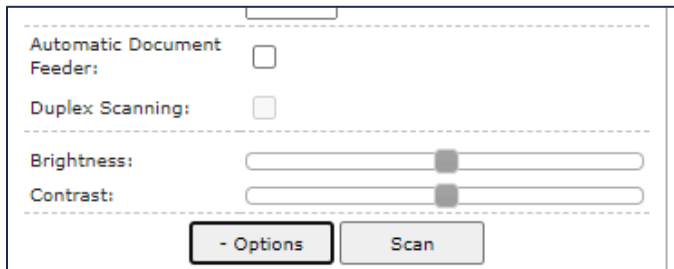
MRN: 11001810 **Address:** Whinging, - 4 Privet Drive **Home Phone:**
DOB: 06-03-2000 Surrey, ONTARIO **Day Phone:**
Sex: F Canada **Primary Care Provider:**
HCN: 7458935430 L2M0A2

Attached Documents					
Attachments	Notes	Attached Date	Attached Via	Active	Actions (Print/View All)
Anaesthetic Questionnaire		19-06-2024 08:33	Uploaded via Provider's Office	Yes	Print/View Edit Deactivate Resend to Coldfeed
History and Physical - FamMed Novari		19-06-2024 08:33	Uploaded via Provider's Office	Yes	Print/View Edit Deactivate Resend to Coldfeed
Patient Consent - Procedure		19-06-2024 08:33	Uploaded via Provider's Office	Yes	Print/View Edit Deactivate Resend to Coldfeed

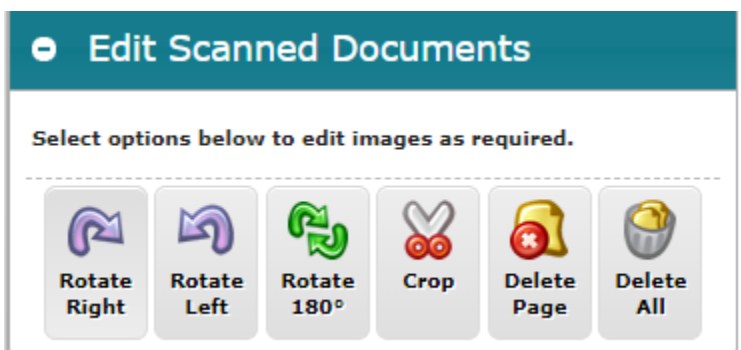
Select which manner desired, either scanning or uploading. If there is a compatible scanner, it will be shown in the drop down menu when scanner is selected.



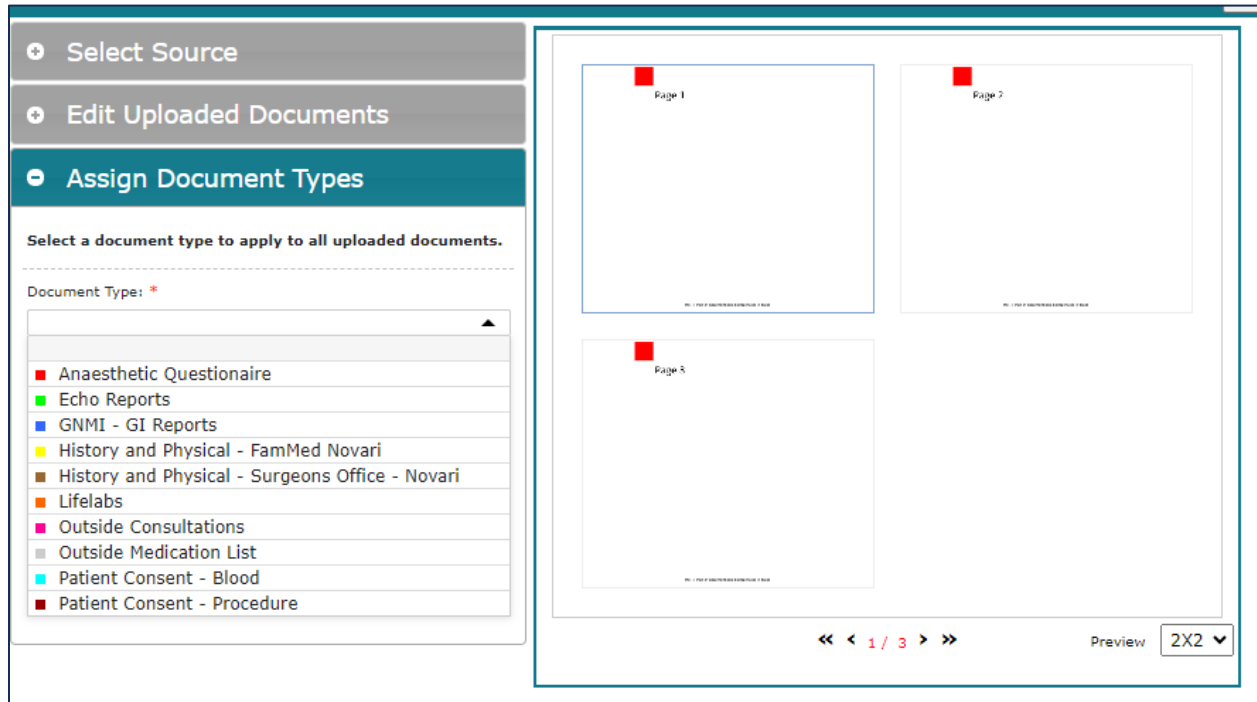
Select Options to review the additional options.



Once Scanned, Edit as needed.

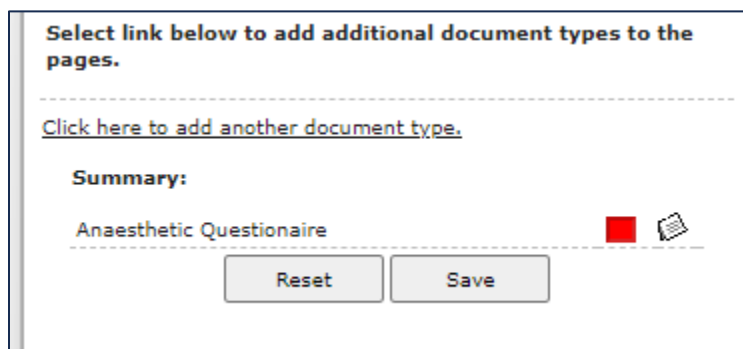


Assign the appropriate document type from the drop down list.

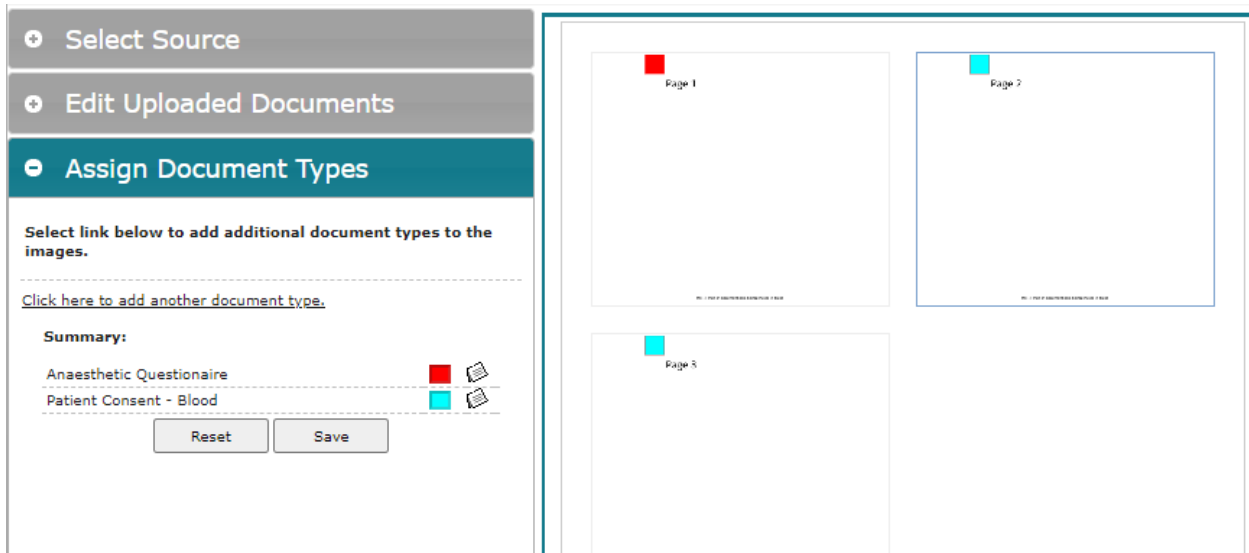


Many documents may be uploaded or scanned at the same time.

Once the first document has been assigned such as page 1 as the Anaesthetic Questionnaire, select [Click here to add another document type.](#)



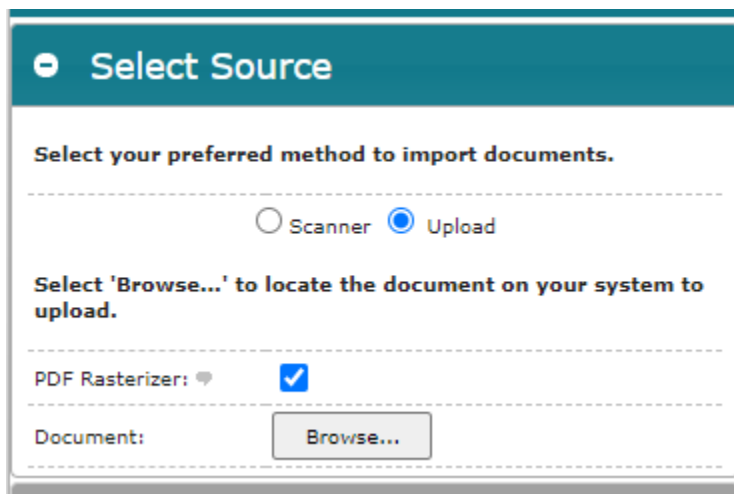
Select the next document type from the drop down and the first page of the next document.



The second page (blue) is now the start of the Patient Consent – Blood. Continue until all document types are assigned and select Save.

This functionality is the same when using the upload option.

Select the source as Upload. Ensure PDF Rasterizer is selected. Browse the computer to located and upload the documents.



Complete adding all attachments as per scanning process.

Case Data Verification

With an interfaced system, once the case is scheduled in the HIS, the case information will flow back to ATC into the Providers Module.

This process is called OR Data Verification and will happen for each Care Venue. Depending on the installation, some of the entered information will be considered a "Critical Match". This information can be seen from the View List or Patient View.

This information will be seen by the provider and will show a green checkmark if all critical elements match between ATC and the HIS.

Important: If an element of the case which is defined as critical does not match, the Providers office will see a red X.

2022/01/19		28	28	NA	
2022/01/31		25	30	NA	
2022/01/31		<div style="border: 1px solid black; padding: 5px;"> <p>MTESTNOVARI, ENDO</p> <p>OR Data Verification Passed (click for details)</p> </div>			
2022/01/28		24	32	NA	

Care Venue Data Verification

MTESTNOVARI, ENDO

MRN: OM00007353 **Address:** **Home Phone:** 222-222-2222
DOB: 1990/11/10 **Day Phone:**
Sex: F **Family Practitioner:**
HCN:

Elements Critical for Match with OR System			
Field	Novari ATC Value	OR System Value	Match
Treatment Date	2022/01/31	2022/01/31	
Procedure (based on code)	COLONOSCOPY - ABNORMAL FIT (Other)	Colonoscopy - Abnormal FIT	
Care Venue	Montfort Endoscopy	Montfort Endoscopy	
Case Order	1	1	
Start Time	0800	0800	
Provider	Jolicoeur, Émilie	Jolicoeur, Émilie	
Elements Non-Critical for Match with OR System			
Field	Novari ATC Value	OR System Value	Match
End Time	0820	0810	
Diagnosis Category	BILE DUCT AND PANCREATIC DISEASE		
Anesthetic			
Notes			-

Transferring a case between Providers

A provider office can transfer unscheduled cases to a pooled list or another provider's list using the Transfer action in the View List in the Provider's Office module.

The receiver must accept the transfer to complete the transaction. To transfer:

- Navigate to Elective Surgical Waiting List
- Select the Transfer icon
- Select the Health Centre, Service and Provider to transfer the case to and select Request Transfer.

Transferred patients appear at the bottom of the View List in pending state until accepted by the receiving surgeon.

Cancellations	Name	MRN	Procedure	Target Days (Pri)	Care Venue	Anesth	Next Available	Current Surg Date	Adjusted Days on List	Adjusted Days to Target	PSS Status
<input type="checkbox"/>	Fishtail_Palm	2428650	BYPASS GRAFT - AORTO-INNOMINATE - PROSTHETIC (Bilateral) 120 minutes	14 (1)	OR	Y			120	-106	

Transfer Case (Fishtail, Palm)

Select request type:

Add to Pool Transfer to List

Select Health Center:

Select Service:

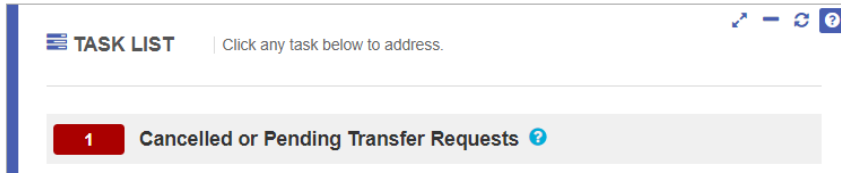
Select Provider:

Cancellations	Name	MRN	Procedure	Target Days (Pri)	Care Venue	Anesth	Next Available	Current Surg Date	Adjusted Days on List	Adjusted Days to Target	PSS Status	Request Status
<input type="checkbox"/>	Fishtail_Palm	2428650	BYPASS GRAFT - AORTO-INNOMINATE - PROSTHETIC (Bilateral) 120 minutes	14 (1)	OR				120	-106		Pending Cancel

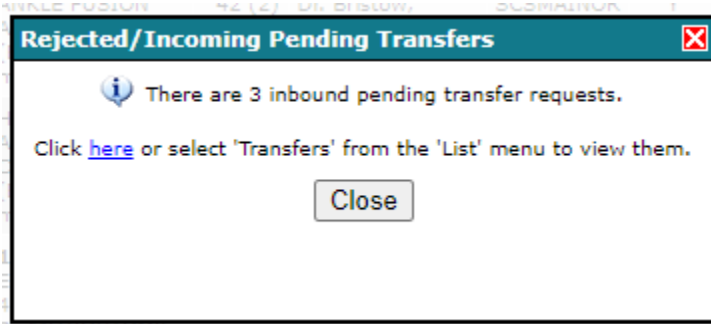
Pending transfers can be viewed in the Transfer section and may be cancelled from here if needed.

Patient Name	Diagnosis Category	Procedure	Pri	Responsible Provider	Care Venue	To Provider	To Care Venue	Request Status
Fishtail, Palm	Left main stenosis > 70%	BYPASS GRAFT - AORTO-INNOMINATE - PROSTHETIC (Bilateral) 120 minutes	1	Lucy, Ann	OR	Mario, Luigi		Pending Cancel

Transfers appear in the receiving provider Task List or can be found under the drop-down menu of List.



Providers are notified of incoming transfer requests upon viewing the Elective Surgical Wait List. Alternatively, select Transfers from the List drop down menu. If needed, log into receiving provider to accept the transfer.



Incoming transfers can be accepted or rejected.

Inbound Requests									
Transfer from Pool to List									
No pending requests									
Pooled Case Responsibility Transfer									
No pending requests									
Transfer from List to List (not pooled)									
Patient Name	Diagnosis Category	Procedure	Pri	Responsible Provider	Care Venue	To Provider	To Case Venue	Request Status	
Fishtail, Palm	Left main stenosis > 70%	BYPASS GRAFT - AORTO-INNOMINATE - PROSTHETIC (Bilateral) 120 minutes	1	Lucy, Ann	OR	Mario, Luigi		Accept Reject	
Outbound Requests									
Transfer from Pool to List									
No pending requests									
Pooled Case Responsibility Transfer									
No pending requests									
Transfer from List to Pool									
No pending requests									
Transfer from List to List (not pooled)									
No pending requests									

Once a transfer has been accepted, it will not be shown in the originating provider list.

Transfer a Case Between Care Venues

If a case is added to one Care Venue but it is decided to be completed in another, open the case to the Case Details screen.

NOVARITEST, APUFOUR [\(edit\)](#)

MRN: 11053268 **Address:** 100 Any St
DOB: 14-01-2000 St Catharines, ONTARIO
Sex: F **Home Phone:** (905)777-7777
HCN: **Day Phone:** (416)333-7777
 Primary Care Provider:
 P99999

Account Numbers
 ADT Account Number: 22004355

Case Details Actions ▾

QuickScreens

WTIS Gynaecologic Surgery Complete [Cannot Edit](#)

✖ OR Data Verification Failed (click for details)

Referral Type	Referral Source	Referring Provider	Wait 1 System Delay Reasons	Wait 1 Priority	Adjusted Wait 1 Days Waited
Re-Referral	Central Intake	Baker	0	4	0

Diagnosis Category	Diagnosis Description
BENIGN TUMOR	test

Procedure (Add) [View Procedure History](#)

Edit: 1. VULVA BIOPSY
 Consented Procedure: VULVA BIOPSY Time: 45 Body Site: Other [Notes:](#)
Responsibility For Payment: Other (More information: test)

Wait 2 Priority	ASA Class	Anesth	Attend Short	Provider	Additional Personnel Manager	Care Venue	PSS Status	PAC Appt. Date	Booking Form?	Patient Alerts
4	5	Y	N	Dr. Baker, Emily Sinclair	0	SCSAPU	Sent	NA	N	5

IP/OP	Admission Type	Post Procedural Destination
OP	Day Surgery (Adult)	Day Surgery (Adult)

Patient Concerns: (For Office Use Only) **Notes: (For Office Use Only)**

Referral Date	Consult Date	Decision to Treat Date	Target Date	Current Surg Date	Wait 2 System Delay Reasons	Procedure Audits (Cancellations)	Documents	Attachments	Adjusted Days on List	Adjusted Days to Target	Dates Affecting Readiness To Treat
19-08-2024	19-08-2024	19-08-2024	17-02-2025	27-08-2024	0	1	0	0	57	124	

Select the Care Venue.

Care Venue
NFSMAINOR

Select the new Care Venue from the drop-down menu and update.

Edit Care Venue

Select a Care Venue

WS Main OR ▾

SCS Main OR

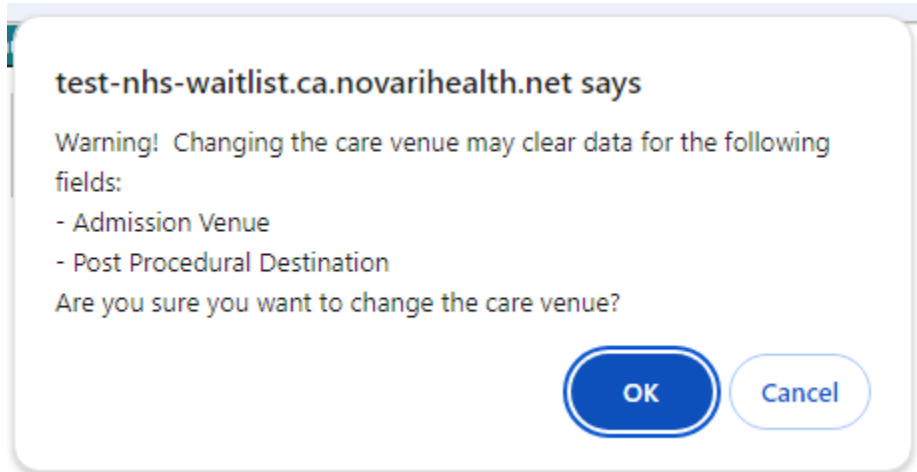
SCS Womens and Babies LD

SCS APU Gyne-4th Floor

NFS Main OR

WS Main OR

Select OK to the next prompt. Niagara has configured all Care Venues to be the same for these two options. No update is required.



This case is now associated to the new Care Venue.

Within Pools, there can be transfer of responsibility only. This means the case will transfer from the entering provider to the receiving provider for responsibility of case. All information on the case will be updated to the receiving provider once accepted.

The screenshot shows a dialog box titled "Transfer Case (SYSTEMTEST, WBONE)". At the top, it says "RESECTION (Other)". Below the title bar, there are two radio buttons under the heading "Select request type:". The first is "Transfer To List" (unselected) and the second is "Transfer Responsibility" (selected). Below this is a "Select Provider:" label followed by a dropdown menu. At the bottom left, there is an information icon and a message: "This case is booked. Provider list is limited to providers at the case's current care venue." At the bottom right, there are two buttons: "Request Transfer" and "Cancel".

This is used in Pools to send a patient to another provider within the same pool to be completed.

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

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

Case is part of Repeat/Follow-up Series

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.

If selecting Add to be activated to the Wait List later, the system will prompt for specifications to when add the additional cases to the Wait List.

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? * 

+/-: * months ▾

Additional Cases

Repeat/Follow-up Every: * years ▾
+/-: * months ▾
of repeats/follow-ups: * [History](#)

Selection of activation to the Waitlist is a mandatory field

Else, selecting Add to Wait List now will do just that.

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 *

Repeat/Follow-up Every: * years ▾
+/-: * months ▾
of repeats/follow-ups: * [History](#)

Confirm the Follow-up Case 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: NFS Main OR
 Service: Urology
 Diagnosis Category: CARCINOMA BLADDER
 Procedure: Procedure Description: ADRENALECTOMY LAPAROSCOPIC
 Consented Procedure: ADRENALECTOMY LAPAROSCOPIC [Edit](#)

Care Plan

Repeat/Follow-up Every: 1 year (+/- 2 months) reoccurring 1 time [Edit](#)

+/- Total Days

120 days

Priority (confirm)

1 (1 days)
 2 (28 days)
 3 (84 days) (recommended)
 4 (182 days)

[Confirm](#)

Review the Created Follow-up Cases. Cases will appear on the waitlist per specifications in each Step 1.

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.

[Add Cases](#) [Remove Cases](#)

Care Plan

Repeat/Follow-up Every: 1 year (+/- 2 months) [Edit](#)

<p>Parent Case On Waitlist</p> <p>View this Case</p> <p>Decision to Treat Date: 01-10-2024</p> <p>Surgery Date: </p> <p>Procedure: ADRENALECTOMY LAPAROSCOPIC (Bilateral)</p> <p>Priority: 2</p>	<p>1. View this Case Activate to Waitlist</p> <p>Activation Date: 10-08-2025</p> <p>Latest Date: 02-11-2025</p> <p>Procedure: ADRENALECTOMY LAPAROSCOPIC (Bilateral)</p> <p>Priority: 3</p> <p> Additional Information Required</p> <p> Booking Information</p>
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[Continue](#)

Note: this can also be done on the Case Completion notification. Select the Case Completion tasks and “Add Repeat/Follow Up”.

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
TEST_LISTUDENT_1	H000001016	GAST/ESOPHAGEAL DILATN ENDO (Other) 75 minutes	Dr. Jones , Mark	BCHSEND	2022/06/01		Clear
TEST_LISTUDENT_13	H000001028	GASTRO/ESOPH BANDING ENDO (Other) 75 minutes	Dr. Jones , Mark	BCHSEND	2022/06/01		Clear

GI ENDO Reporting Requirements

GI Endo DSP Reporting may or may not be configured in this installation.

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))

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

Prior Inadequate/Incomplete Colonoscopy

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

Secondary Reason for Colonoscopy

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

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

Note: There are additional resources available by selecting the blue hyperlink on the right hand side of this Quick Screen Data Collection screen.

IMPORTANT: Only use OS as a Primary Reason for Colonoscopy when no other category is applicable. The Niagara Health Schedulers will follow up directly to confirm appropriateness.

If there is a patient Self delay, add a DART to the patient selecting patient chooses to defer only. This will also identify that the patient is not available to be scheduled until the end of the DART.

This can be done after the Add Patient process by accessing the Case Details screen.

Document Management

ATC has additional functionality that may not be covered in this manual. Document management is a feature that is traditionally used once the basic functionality has been mastered.

These are located under the heading of Documents on the Elective Surgical Waiting List.



If desired, refer to the Help Center in Novari ATC for more information.

Reports

The Report Module on the Splash Screen allows access to standardized reporting based on user specified criteria. This information is limited to the providers in which permissions are granted.

If desired, refer to the Help Center in Novari ATC for more information.