Novari ATC Provider Module

TEMPLATE

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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/

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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.
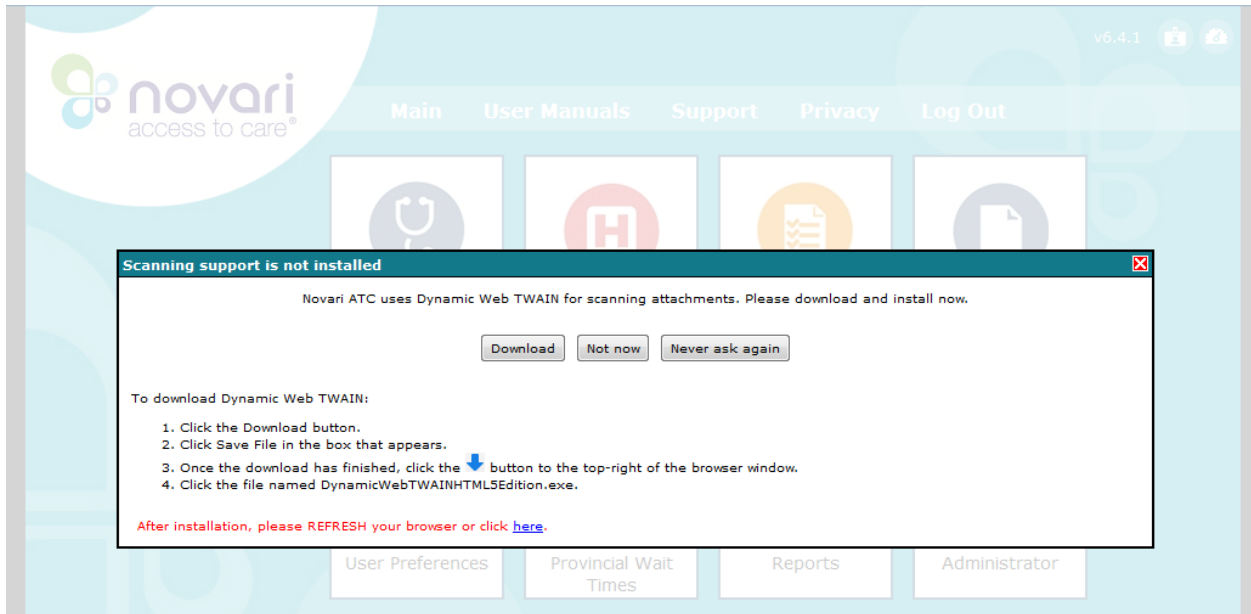
See this section for more information on Attachments. Scanning and Uploading Attachments

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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.
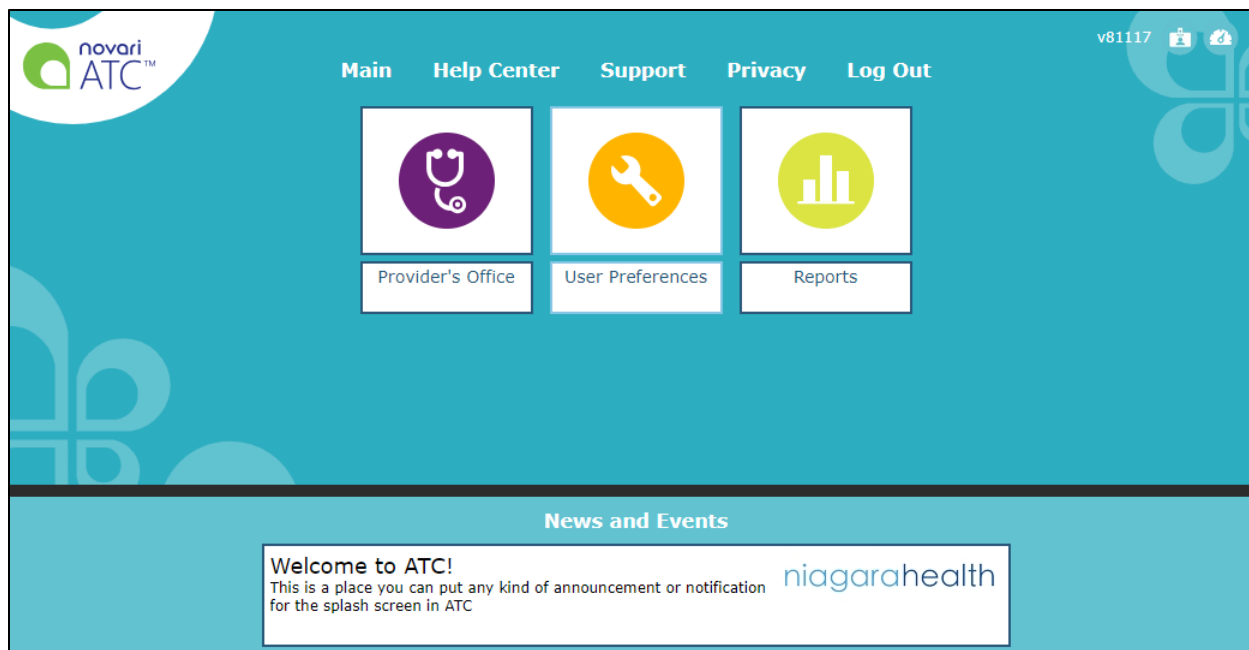
Modules

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 thee 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 [ ] Confirm Password [ ]
Pin	New Pin [ ] Confirm Pin [ ]
Default List Order for Elective Surgical Waitlist	Days / Percent To Target ⌄
Measure Patient Targets by Days or Percentage?	⦿ Days ○ Percent
Default Patient Search Field	HCN ⌄
Default Patient Search Field Sort Order	Name ⌄
Enter Booking Info on Patient Add?	⦿ Yes ○ No
Review PSS Info on Patient Add?	○ Yes ○ No ⦿ Ask Me Each Time
Show Weekdays Only in Booking Calendar?	⦿ Yes ○ No
Display Notes Column on List View?	○ Yes ⦿ No
Display Days on List as Adjusted?	○ Days (do not factor unavailable dates) ⦿ Adjusted Days (factor unavailable dates)
Display Service Time on List View?	○ Yes ⦿ No
Display Days to Target as Adjusted?	○ Days (do not factor unavailable dates) ⦿ 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	⦿ Scanner ○ 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 ☐ Beaulieu, Chantal ☐ 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:

Procedure:

Wait 1 Priority: 1 2 3 4

Wait 2 Priority: 1 2 3 4

Attend Short: Yes No

If Cancer: ☐ Diagnostic ☐ Palliative ☐ Reconstruction ☐ Treatment

Diagnosis Category

☐ BENIGN TUMOR ☐ BILE DUCT AND PANCREATIC DISEASE ☐ DISEASES OF TERMINAL ILEUM COLON AND RECTUM ☐ DISEASES OF UPPER GI TRACT ☐ LYMPHOMA

☐ MALIGNANT (OTHER) ☐ OTHER (GEN SURG) ☐ PROBABLE MALIGNANCY ☐ SARCOMA BONE ☐ SARCOMA SOFT TISSUE

☐ SKIN CARCINOMA ☐ SKIN MELANOMA ☐ SMALL BOWEL AND OTHER INTESTINAL DISEASE

Alerts

Alert

☐ Airway ☐ Bleeding ☐ Communication ☐ CPAP use – Compliant ☐ CPAP use – Non-compliant

☐ Diabetes ☐ Malignant Hyperthermia ☐ Medical Condition/Treatment ☐ Neuro ☐ Obstructive Sleep Apnea

☐ Positioning Restrictions ☐ Pseudocholinesterase Deficiency ☐ Restrictions ☐ Safety Precautions ☐ Sleep Apnea

☐ Surgical Condition ☐ Violence flag ☐ Other _____ ☐ **None**

Allergy

☐ Latex Allergy ☐ Penicillins ☐ Sulfa ☐ Other Allergies ☐ **None**

Comorbidities

☐ BMI greater than 45kg/m2 ☐ Cardiac Disease ☐ COPD ☐ Deep Vein Thrombosis ☐ Pacemaker/ICD (patient to be seen by Heart Institute)

☐ Urinary Problems – Indications for the insertion of indwelling catheter ☐ Other: _____ ☐ **None**

Medications

☐ Patient taking anticoagulants, Antiplatelets or Corticosteroids ☐ **None**

Anesthetic

☐ General ☐ Local ☐ Monitored Anaesthetic Care ☐ Neuroleptic Sedation ☐ Peripheral Nerve Block - Lower Extremity ☐ Peripheral Nerve Block - Upper Extremity

☐ Spinal ☐ Topical ☐ Epidural ☐ None

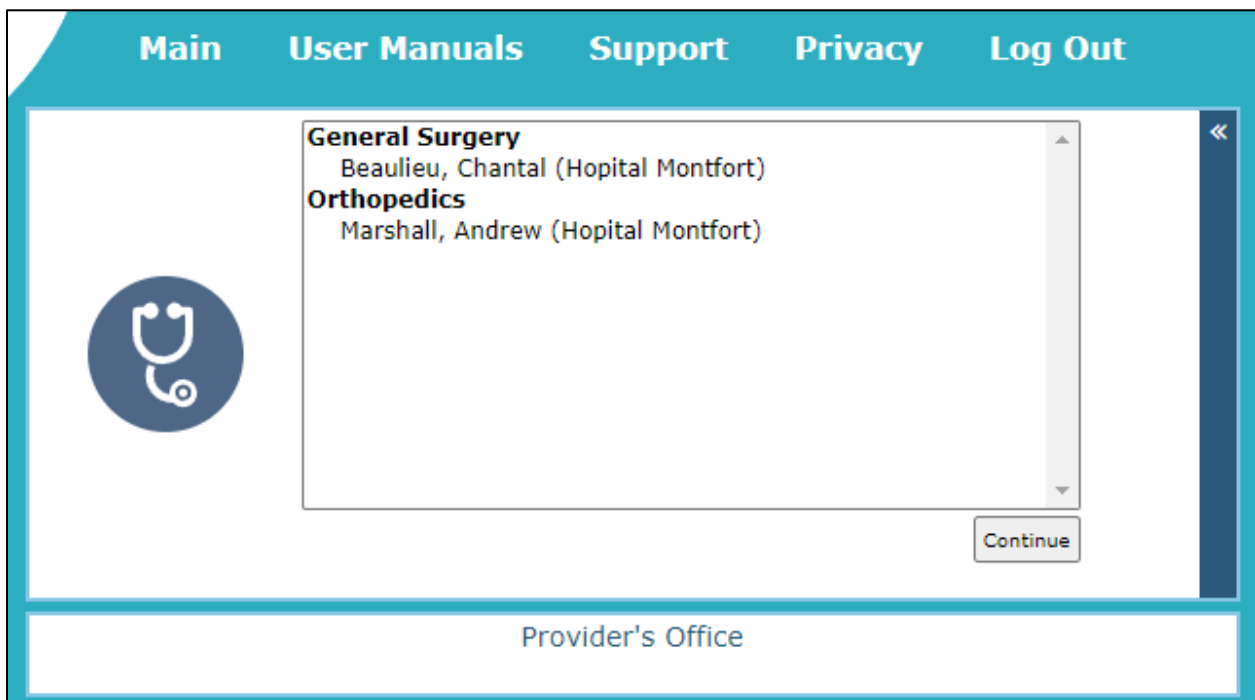NON-STANDARD TESTS or CONSULTS: _____

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.
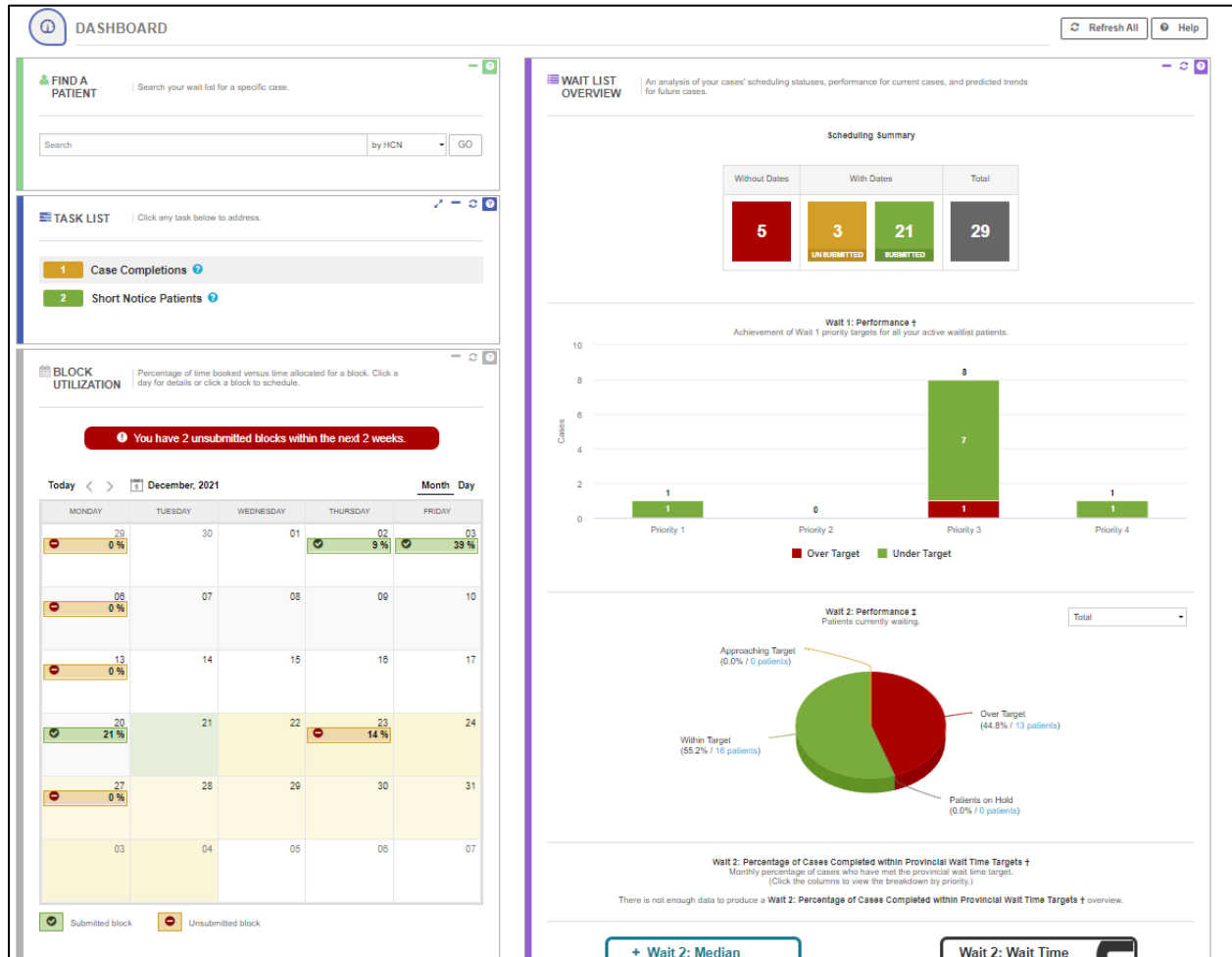
Find a Patient

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.

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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.
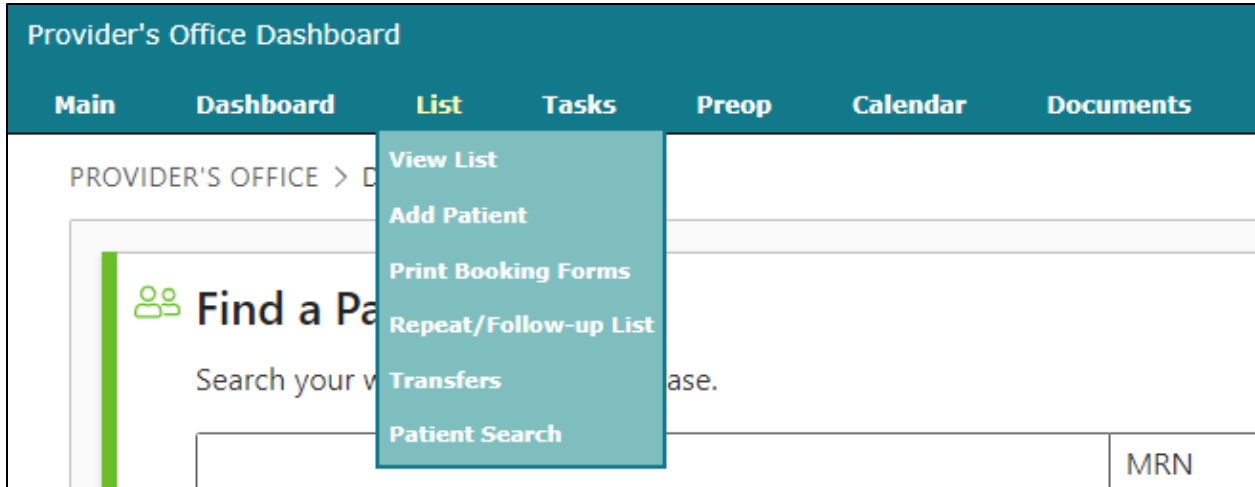
Wait 2: Performance

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.
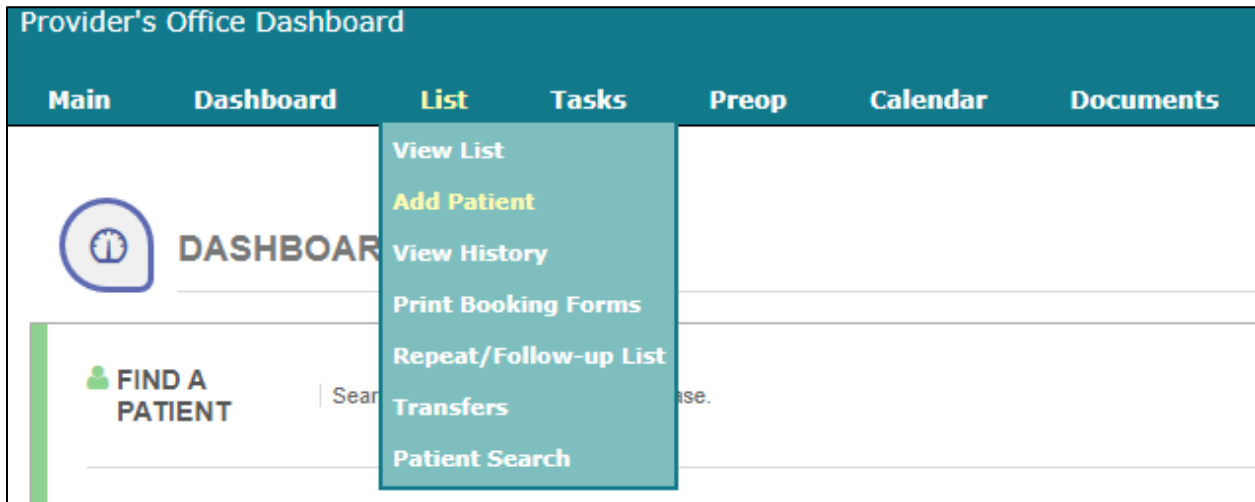
Hover over the options to reveal a dropdown menu.

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

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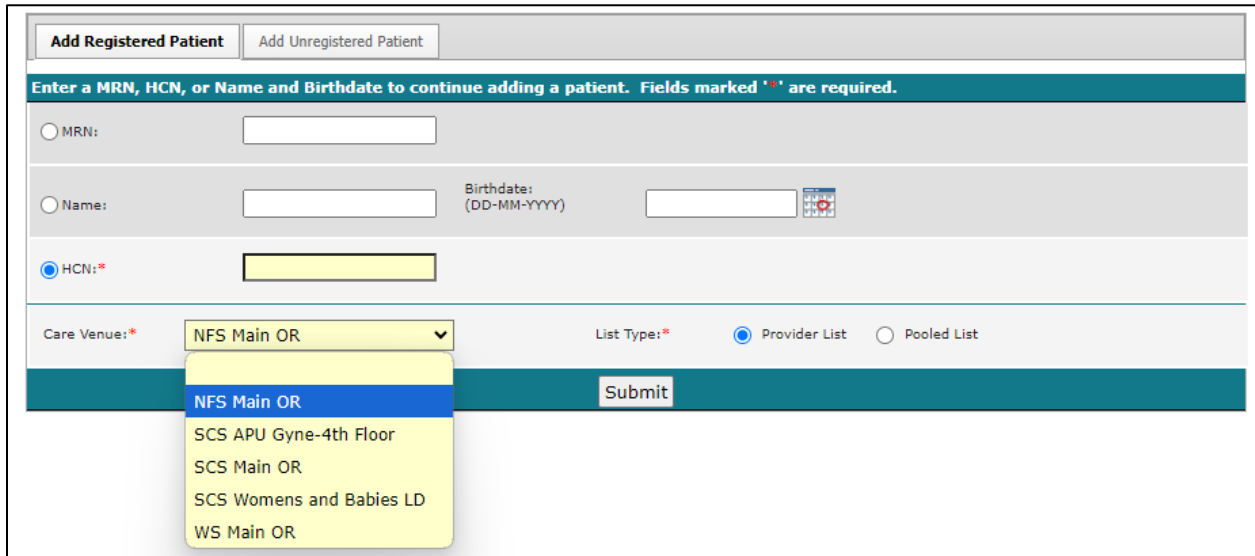ER cases in the task list drop down is not applicable.

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.

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

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Add Unregistered Patient

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

Add Registered Patient	**Add Unregistered Patient**	

Enter patient information. Fields marked '*' are required.

Care Venue:*	NFS Main OR ▾	List Type:*	● Provider List ○ Pooled List
Last name:*		Street address:*	
First name:*		Apt/Suite:	
Other/Middle name(s):		City:*	
Sex:*	▾	Country:*	Canada ▾
Birthdate: * (DD-MM-YYYY)		Province/State:*	ONTARIO ▾
HCN:		Postal code/Zip code:*	
HCN prov/state:		Home phone:	
HCN version code:		Day phone:*	
HCN expiry date: (DD-MM-YYYY)		Primary Care Provider:	

Submit | Reset | 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

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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.

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.

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

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

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.

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

Select the appropriate information from the dropdown menus as applicable.

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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.

Scroll down for more options. Specify any required Equipment in this section.
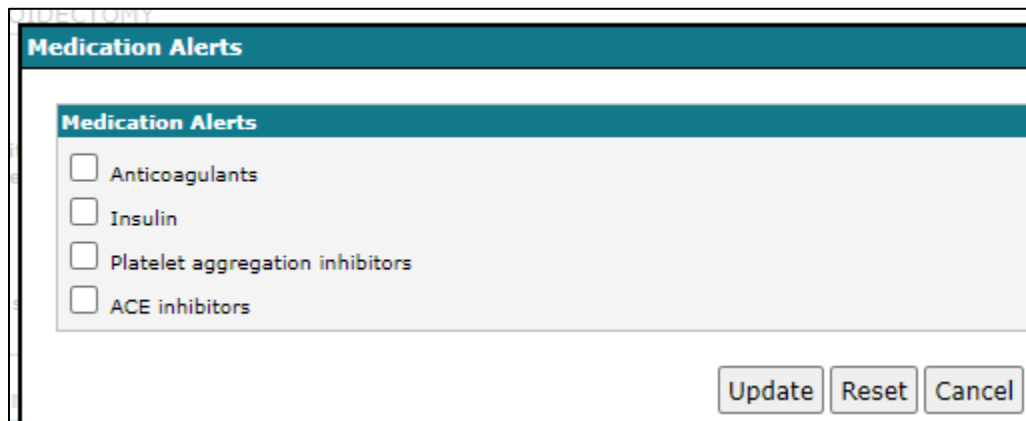
This e-mail or document(s) is being shared in trust.
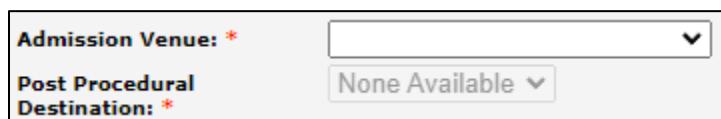
Niagara Health is gathering information on the patient Cormorbidities. Open this section and select appropriate options. Note that these sections may be expanded in the future.
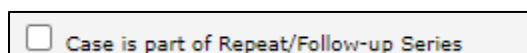
Select appropriate medications the patient is currently taking.

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)	✎			☐	Not Completed ⌄		Ignore
ⓘ OnTrac Review	✎			☐	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

[Add] [Cancel]

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

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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.

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.

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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? *(?)		⌄

| Yes |
| No |

(* denotes required field)

Submit

⚠ 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 Endscopy
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)

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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**
HCN: 2349702387	N0N0N0	**Provider:**

* 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: * [Search] [QuickPick]   ◉ Short List ○ Full List   **Procedure Code:**   **Est. Procedure Time:** *

COLONOSCOPY ⌄   2563697521   15

mins
Default: 15
(Apply)
Setup:5 /
Cleanup:5

Consented Procedure 1: *
COLONOSCOPY

Body Site: *
◉ Other - specify(optional): [   ]

Procedure Notes:
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 [Edit]
   ◉ No (None Known)

Priority & ASA Class

Wait 2 Priority Set: * (Descriptions) **Wait 2 Priority Score**
GI Endoscopy DSP PAT   FT (56 days) ⌄

ASA Class: *   1 ⌄
                          Descriptions

General Info. & Alerts

Attend Short: ○ Yes ◉ No   **Patient Alert/Allergy Indication?:** * ◉ Yes ○ No [Edit]

Admission Venue: *   Endo Outpatient (ADULT) ⌄
Post Procedural Destination: *   Day Surgery (Adult) ⌄
☐ Case is part of Repeat/Follow-up Series

Patient Concerns: (For Office Use Only)

Notes: (For Office Use Only)

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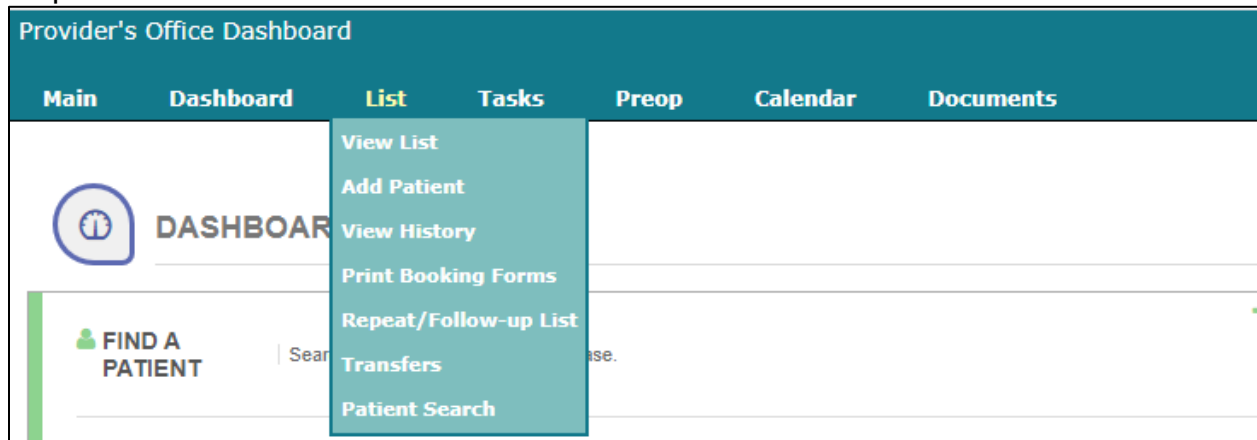
This list can be sorted by clicking on the headers either once for ascending, twice for descending. Hover over the headers for an explanation of what each means.

	Cancellations	Nt.		Name	MRN	Procedure	Target Days (Pri)	Care Venue	Anesth	Next Available	Current Surg Date			Adjusted Days on List	Adjusted Days to Target	PSS Status	
☐	🟡			TEST, MICHELLE	OM00006908	BIOPSY BREAST BILATERAL (Bilateral) 60 minutes	28 (2)	MONOR	Y		2022/01/07	✔		14	13	NA	➡
☐	🟡			TEST, BIOPSY	OM00007181	COLOSTOMY (Other) 60 minutes	28 (3)	MONOR	Y		2022/01/07	✔		14	13	NA	➡
☐	🟢			MPCSTRAIN, DENARYS	OM00061494	EXCISION BACK LIPOMA (Other) 30 minutes	28 (3)	MONOR	N		2022/01/13	✔	❌	7	20	NA	➡
☐	🟢			TEST, ADDY	OM00061465	INGUINAL HERNIA REPAIR (Right) 40 minutes	84 (3)	MONOR	Y		2022/01/07	✔		15	68	NA	➡
☐	🟢			MPCSTRAIN, BRADLEY TWO	OM00061484	BIOPSY AXILLARY MASS (Right) 45 minutes	84 (3)	MONOR	Y		2022/01/10	✔	✅	14	69	NA	➡
☐	🟢			MAMBTEST,	OM00007331	EXCISION	84 (3)	MONOR	Y		2022/01/10	✔	✅	14	69	NA	➡

Patients 1- 16 of 16

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.

View List Actions ▽
Filter this List
Sort Builder
Print this List
Generate Documents for this List
Find a Patient on the List
Add all patients to my Clipboard
Remove all patients from my Clipboard
Transfer all patients that are on my Clipboard
Generate a QuickStats Report
Select Provider(s)
Change Target Type
Show Days To Target as %

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From the top right side of the screen, there is a robust filter option. Select the Filter List to open filter criteria.
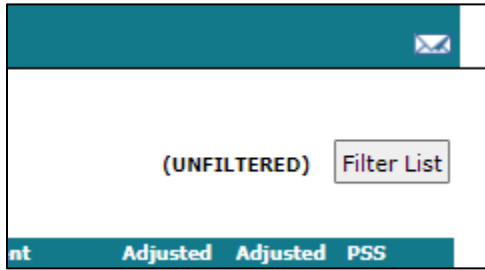
Select the criteria and Apply Filter. Selecting Reset All will clear the filter options.

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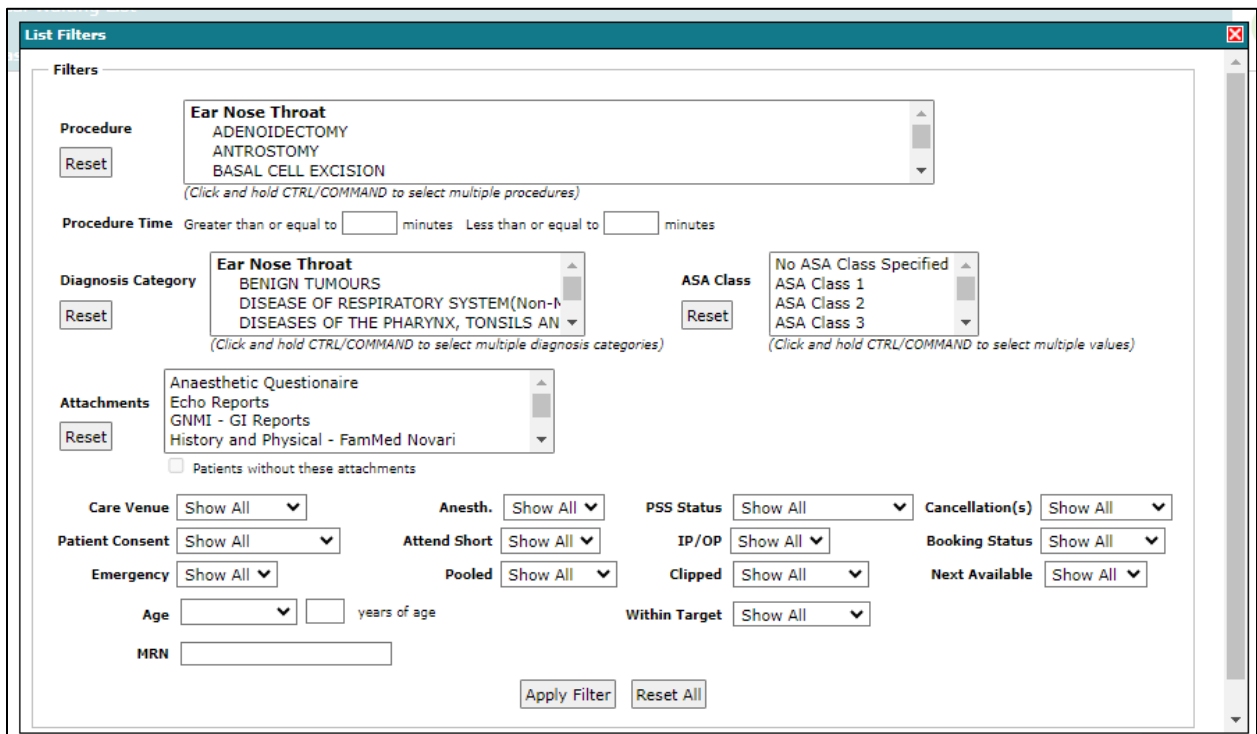
Case Details Screen

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.

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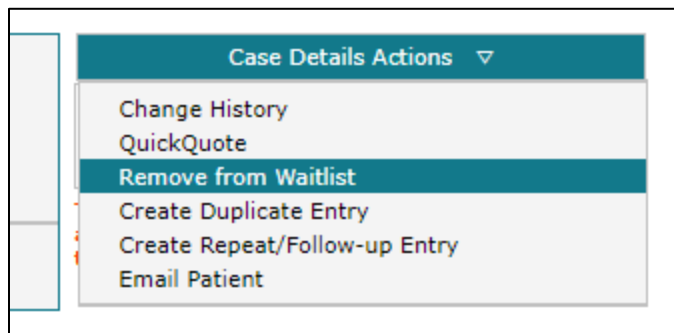

Additional procedures may also be added after the initial Patient Add.

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 a 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
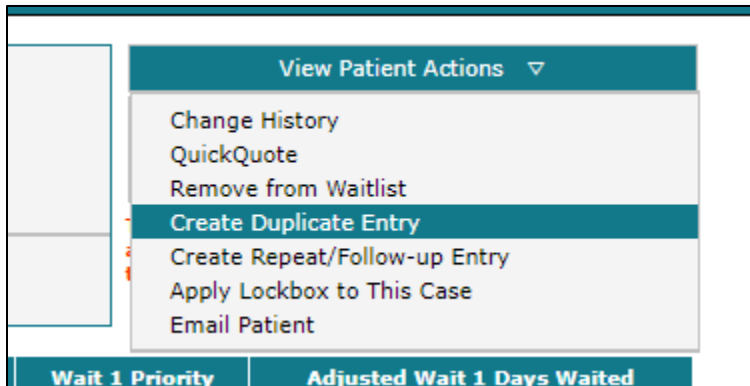

The system will prompt for procedure notes and will automatically select the same procedure with the opposite body site/laterality.

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.

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.

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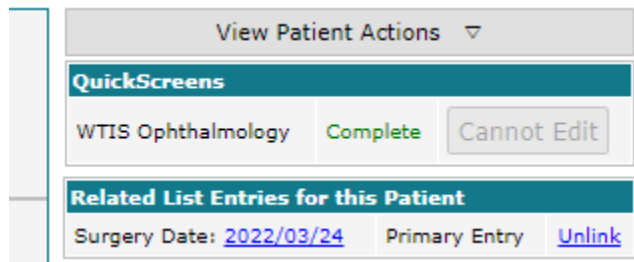
The image above would be found on the Case Details screen of the duplicate waitlist entry. The surgery date for the primary entry is shown. Clicking on the surgery date, or 'N/A' if a surgery has not yet been determined, loads the Case Details screen for the primary entry.

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.

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

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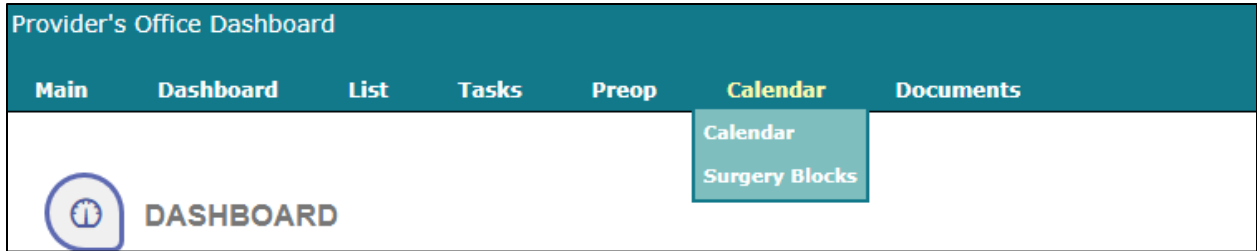
Use this option to create recurring blocks which are set on a weekly/biweekly basis.

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.

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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.
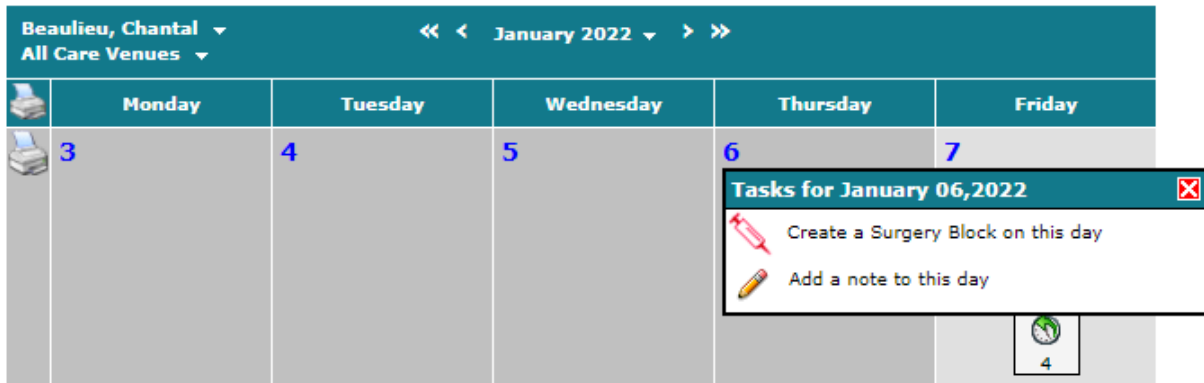
To modify/delete an existing block, click on the blue number of a day with the block desired. From here, there is a list of actions to select.
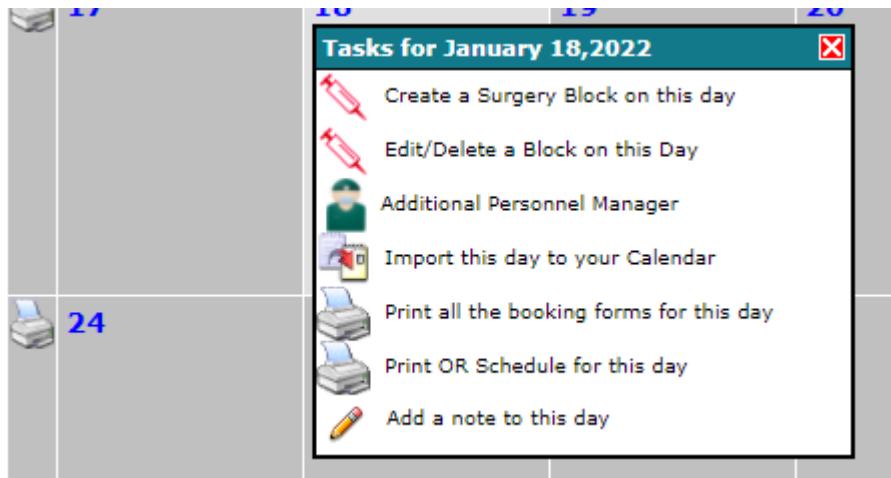
Note: Two blocks can be created for one day if needed. For example, a morning OR block and an afternoon ENDO block.

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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.

	●		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.

NEW	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.

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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.

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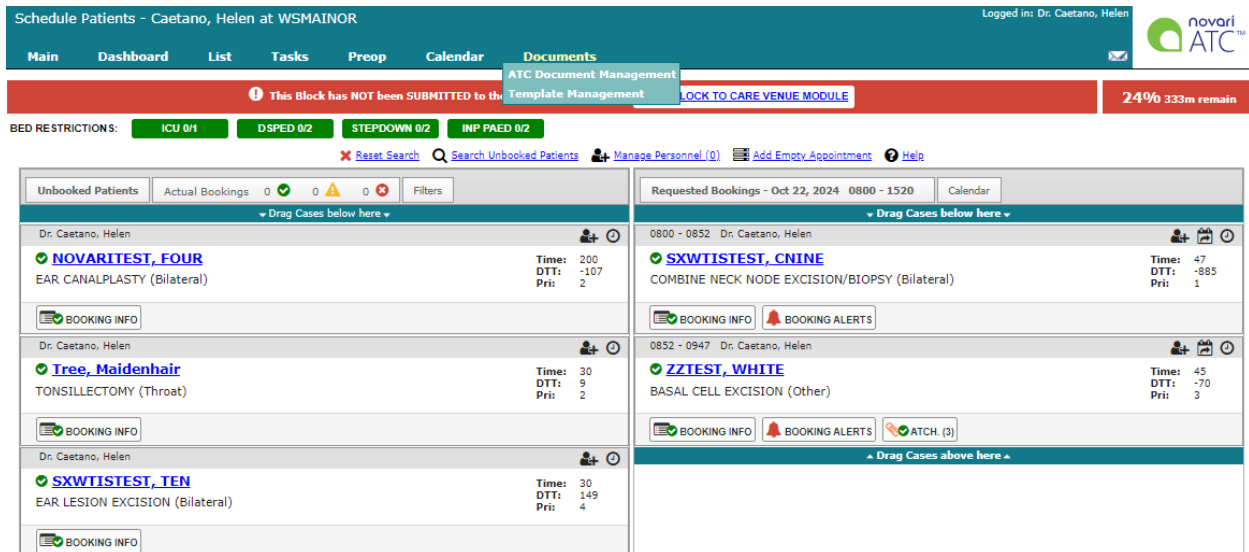
3. Booking Calendar – Drop and Drag Scheduling

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.

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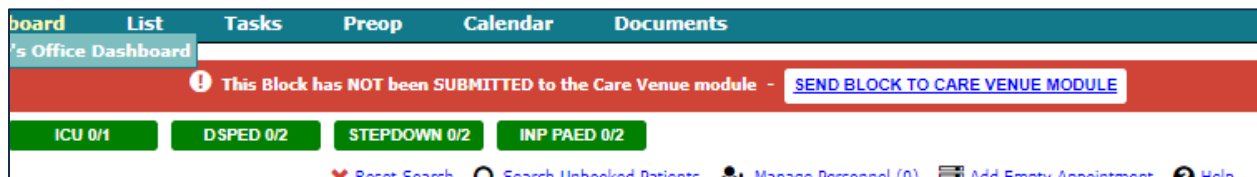
Once the block is submitted, any cases added to this block will automatically be transmitted to the Care Venue.

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.
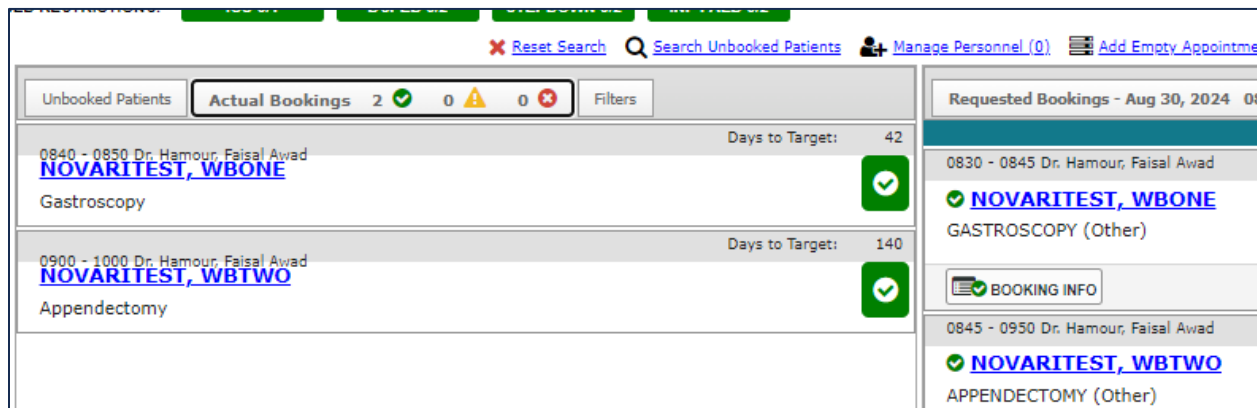
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The Booking Calendar view will also show a summary of cases and their status.
- Green check are cases scheduled in the HIS.
- Yellow triangle are cases still to be scheduled.
- Red X are cases where the Case Verification has failed and should be reviewed.

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.

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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.
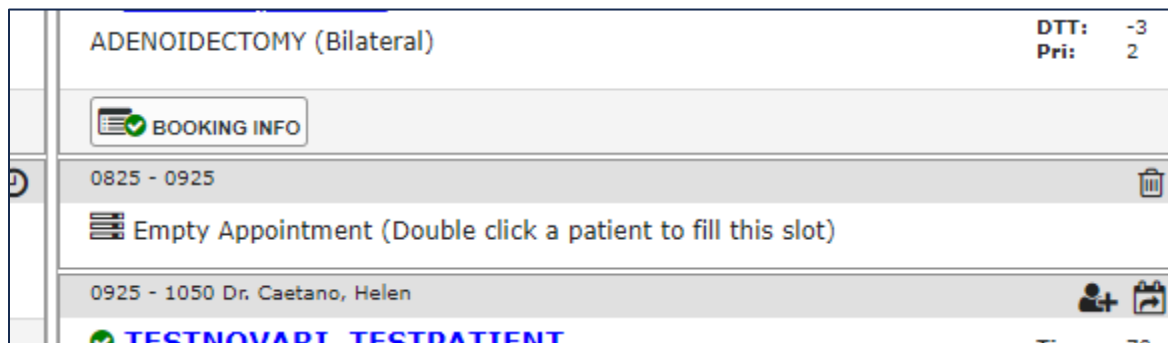
This is possible by creating an Empty Appointment. This can be done on the Calendar view. Select the option of Add Empty Appointment.
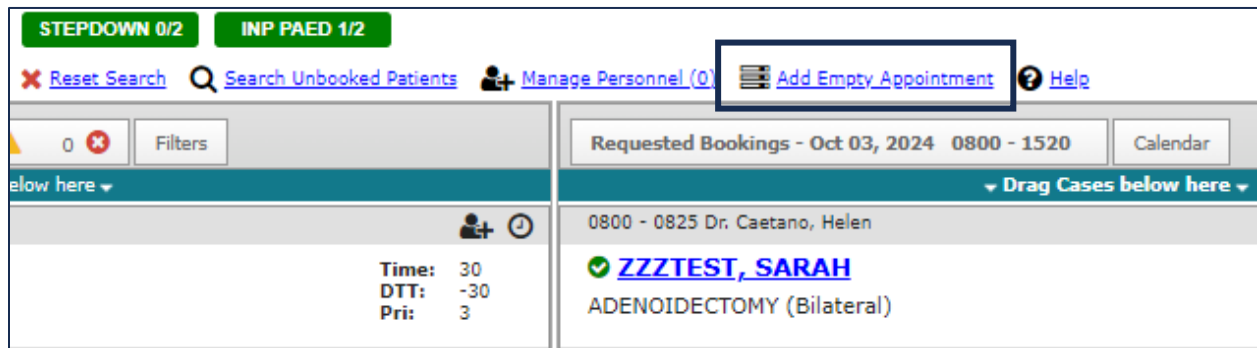
Specify when to start the empty appointment at as well as the duration needed.
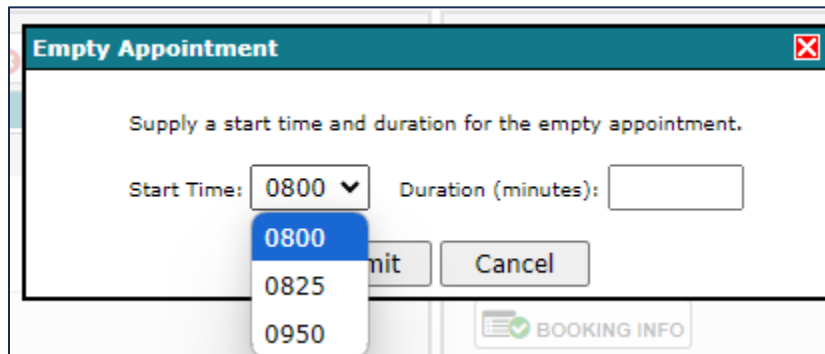
This will create a placeholder in the block day to hold even if this block is submitted to the Care Venue.

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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.
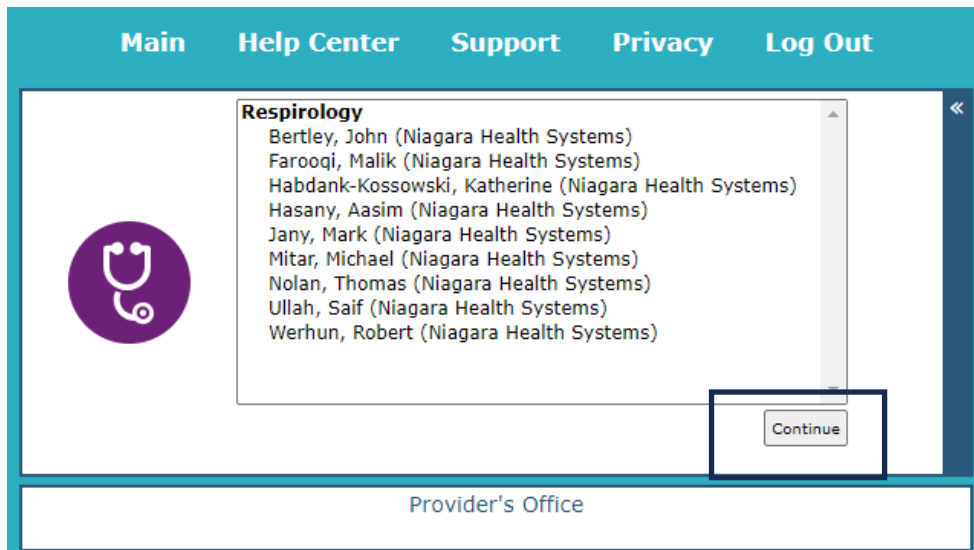
Adding a Case to a Pool

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.

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Add the case per standard process.

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.

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

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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.


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.


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

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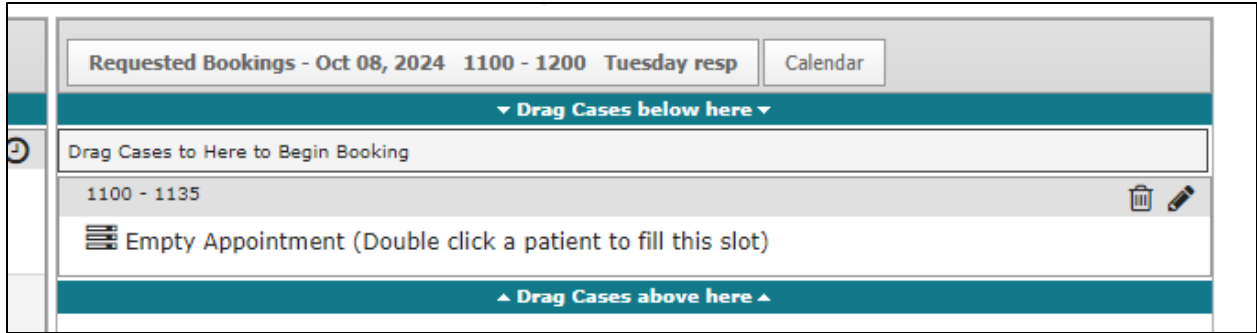
Some Pools calendars may be set up in a Slate Mode. This allows the user to drop and drag the case to the appropriate time on the calendar block. When cancel reschedule on a slate block, the cases before and after are not affected and therefore do not require an empty appointment to be created. Slate mode is only noticeable on the Schedule Patients Calendar view. The Mini Scheduler process is the same as non-slate or compactor mode.
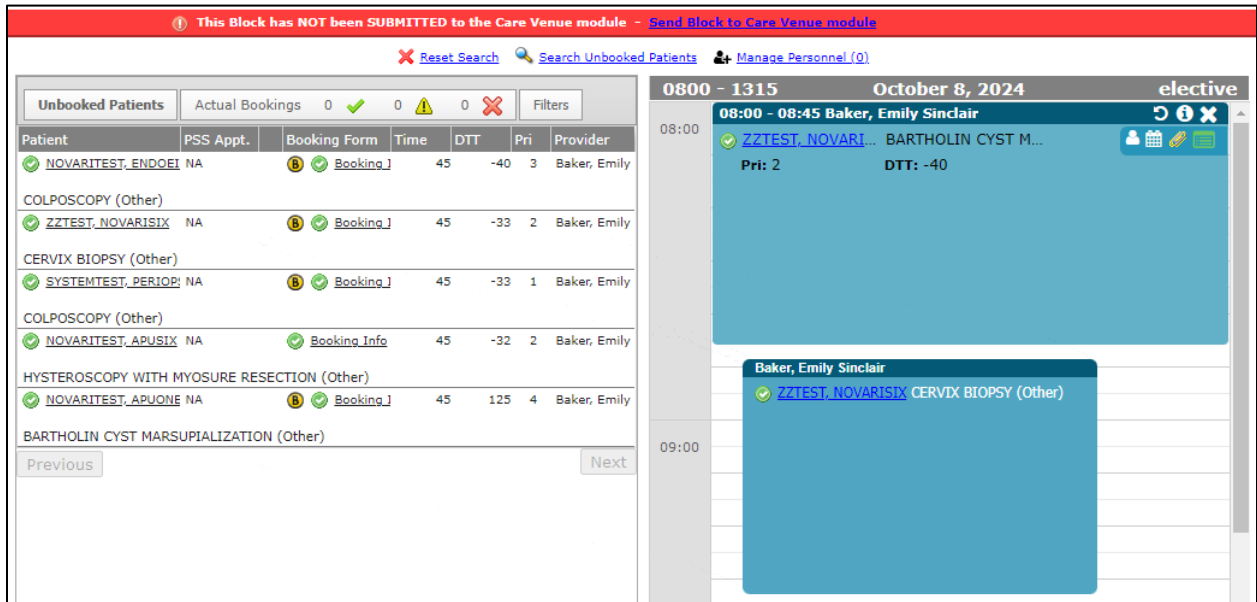
Ensure all cases are scheduled without empty space between cases. Slate mode has different icons on the case. Hover over each of the symbols for prompts. The X is to cancel the case. Cancel Reschedule may be done using the Mini Scheduler as well.
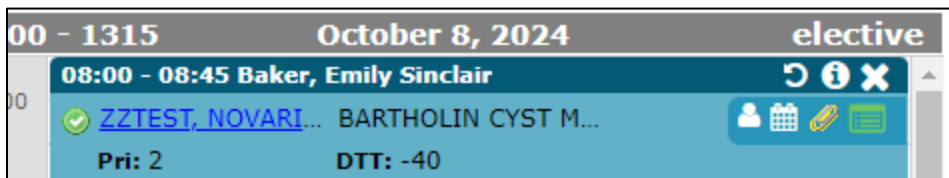
Process may include submitting the block when the first case is scheduled.

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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.

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.

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.

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

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.

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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.

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.

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

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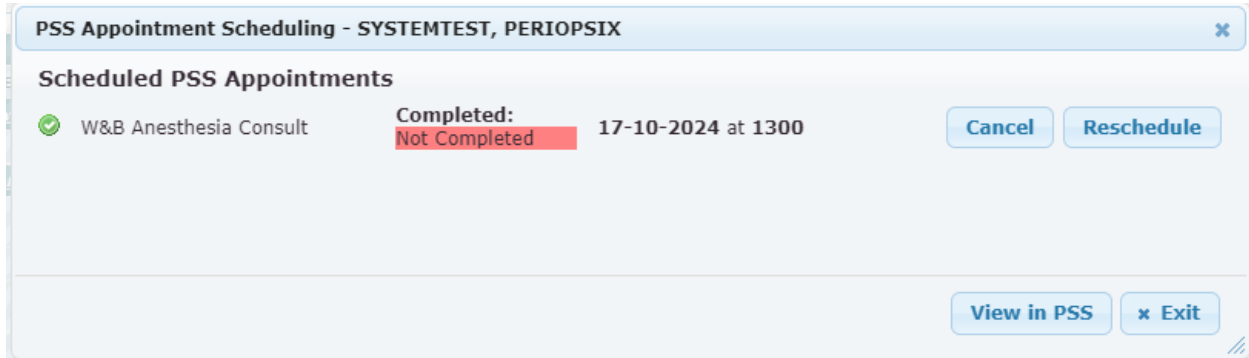
If the patient needs to reschedule the Anesthesia consult, follow the same process and select Reschedule. This will allow to select a new date and time.

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	
☐	6	🔗	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.**
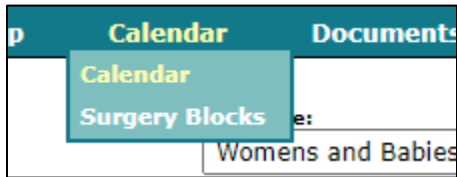
If the provider has access to more than one Pool, use the drop-down menu to select the appropriate option.
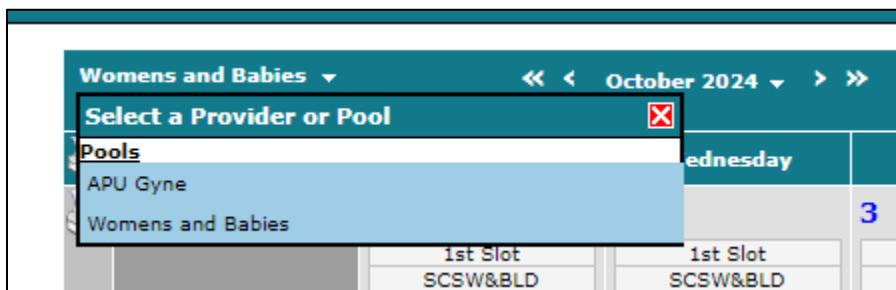
This will show the calendar with the available dates and blocks (time). Select an empty block to request.
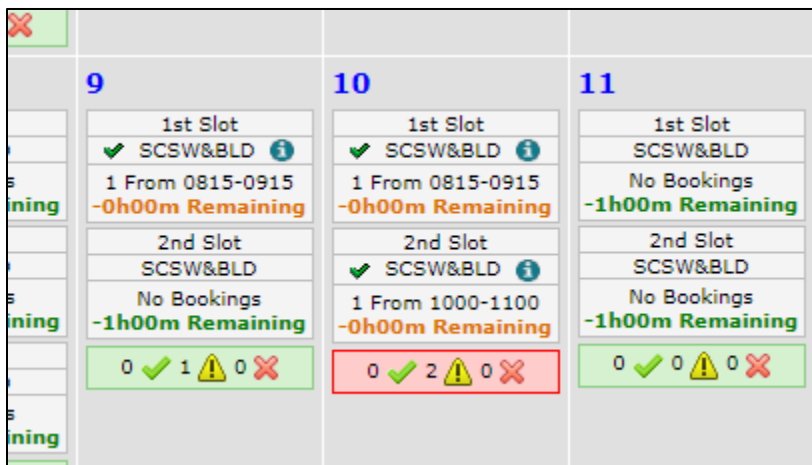
Cases can only be seen with the appropriate permissions. Blocks will show BOOKED if another provider has already selected that date/time block.

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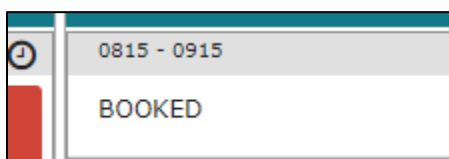
Drag the case to the right side of the calendar.

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

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

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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 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.

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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: * Search QuickPick   ● Short List ○ Full List   Est. Procedure Time: *

CERVIX BIOPSY   3000000131   45
mins
Consented Procedure 1: *   Default:
CERVIX BIOPSY   45
    (Apply)
    Setup:0 /
    Cleanup:0

Body Site: *
    ● Other - specify(optional):   **Procedure Notes:**
    First Procedure

Responsibility For Payment: * Provincial Government (OHIP)

Procedure 2 Provider: *	Baker, Emily Sinclair

Procedure 2: * Search QuickPick Remove   ● Short List ○ Full List   Est. Procedure Time: *

CERVIX CONE BIOPSY   3000000132   0
mins
Consented Procedure 2: *   Default:
CERVIX CONE BIOPSY   45
    (Apply)
    Setup:0 /
    Cleanup:0

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)			
MRN: 11001652	**Address:** 123 Main St	**Home Phone:**	
DOB: 01-12-2000	Ontario, ONTARIO	**Day Phone:**	
Sex: F	Canada	**Primary Care**	
HCN: 2349702387	N0N0N0	**Provider:**	

Case Details Actions ▽

QuickScreens

Paediatric Relevance of Case	Complete	Edit
WTIS Gynaecologic Surgery	Complete	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** **To Treat**
08-10-2024	05-11-2024		0	0	0	0	7	20	

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	
☐	🔴		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	➡
☐	🔴		SYSTEMTEST, WBONE	100000143	COLPOSCOPY (Other) 20 minutes	84 (3)	Dr. Zefkic, Katrina Elise	SCSAPU	N		29-10-2024	133	-49	NA	➡
☐	🔴		NOVARITEST, APUTHREE	11053246	HYMENECTOMY (Other) 45 minutes	14 (2)	Dr. Baker, Emily Sinclair	SCSAPU	Y		~~27-08-2024~~	57	-43	NA	➡
☐	🔴		ZZTEST, NOVARININE	11002858	DILATION AND CURETTAGE (Other) 30 minutes	28 (2)	Dr. Wang, James Chian-Ming	SCSAPU	Y		29-10-2024	69	-41	NA	➡
☐	🔴	📎	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.**
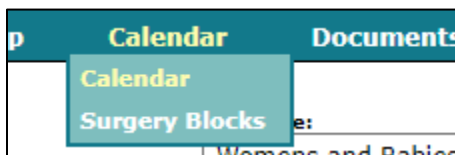

If the provider has access to more than one Pool, use the drop-down menu to select the appropriate option.
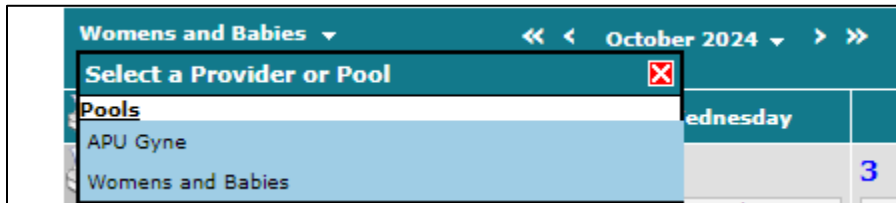

This will show the calendar with the next available date. Select the appropriate block to schedule into. There are two separate blocks in the APU Gyne pool. The morning block is for the shared scheduling of cases.

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.
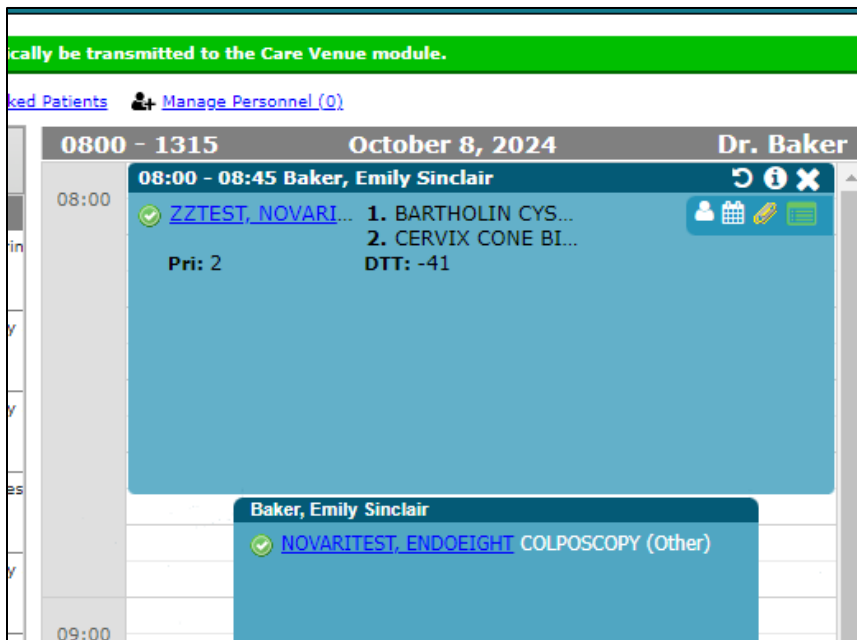
Navigate to the first block of the day and open.
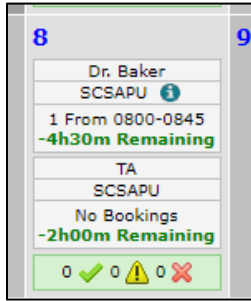
If there are existing cases, they will already show in the block. Add cases directly beneath the previous one without leaving any additional time. All cases with any provider will show in the Unbooked Patients tab.
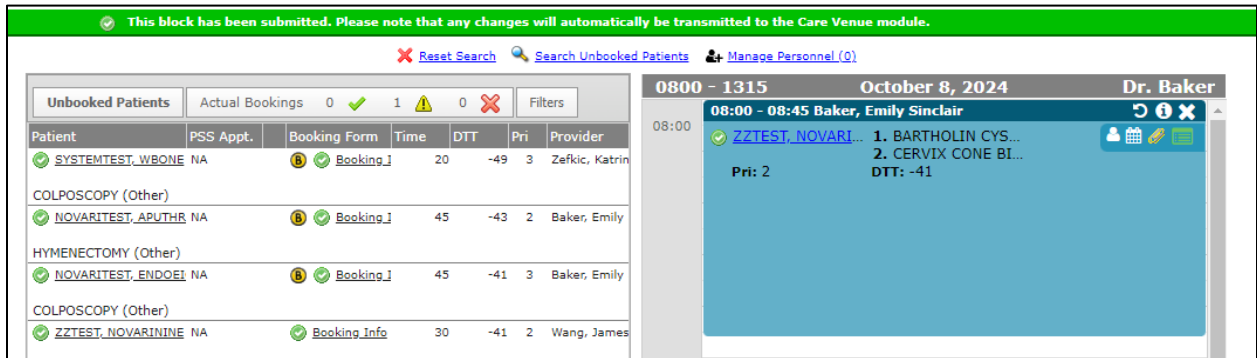
Drag the required case to beneath the previous one.

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

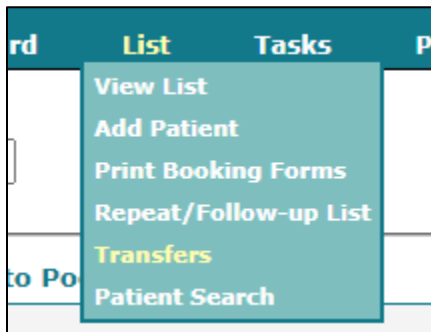This Block has NOT been SUBMITTED to the Care Venue module - Send Block to Care Venue module

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.

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

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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.

Cancelling 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
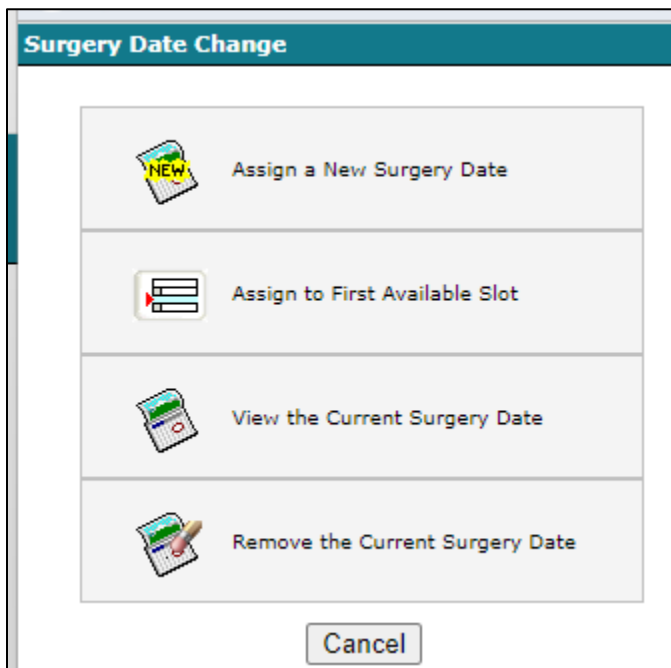
1. Elective Surgical Waiting List – Mini scheduler Cancel Reschedule

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.

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".

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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

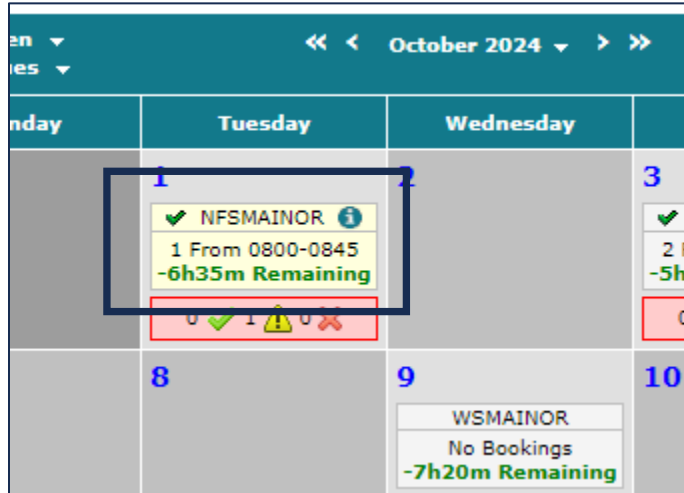## 2. Case Details Screen – Mini Scheduler Cancel Reschedule

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.

Follow the same directions as in Option 1.

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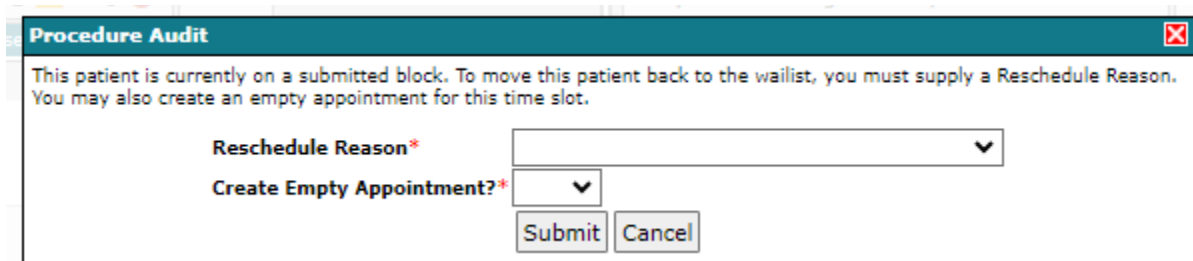
3. Booking Calendar – Drop and Drag Cancel Reschedule

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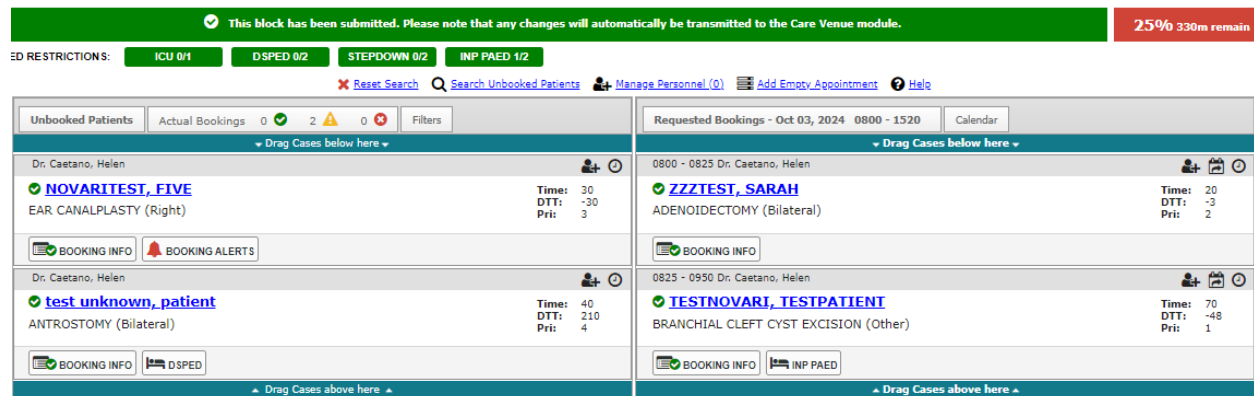
Simply drag the cases from the right side of the screen to the left. Since this case has been submitted to the Care Venue, the system will prompt for a reschedule reason.

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

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

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.

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.
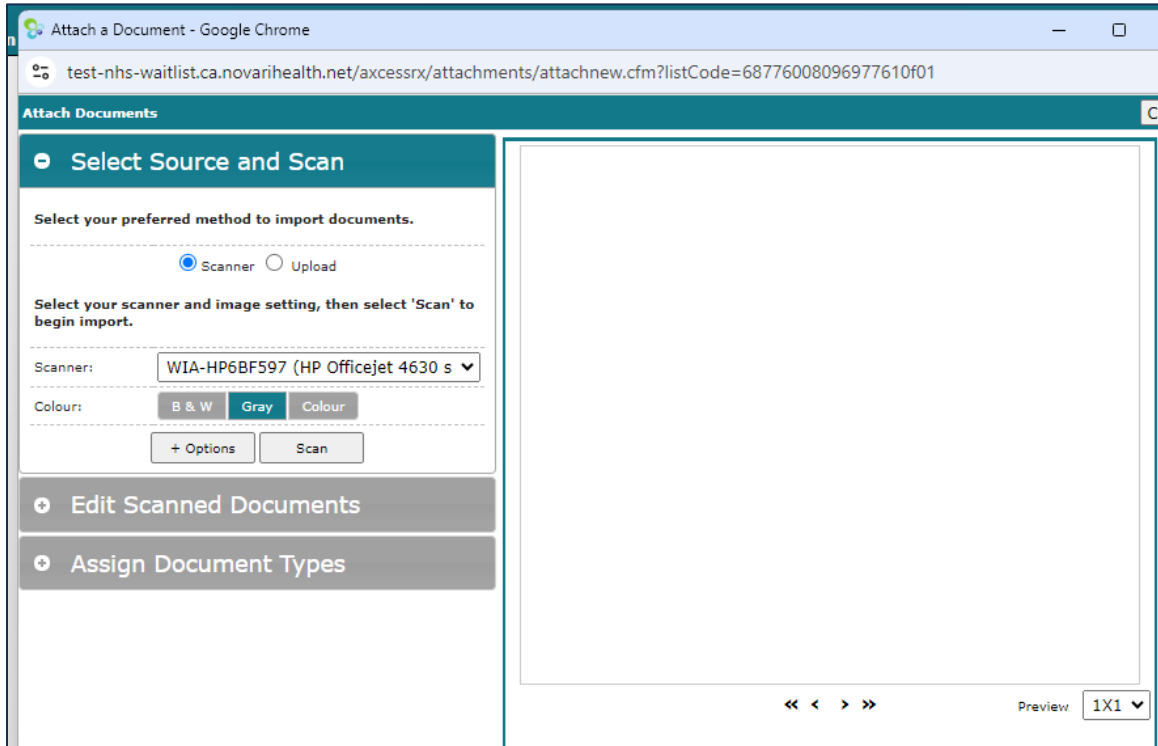

From here, actions can be executed for the attachments. Notice the attachment cannot be deleted but can be inactivated if attached incorrectly.

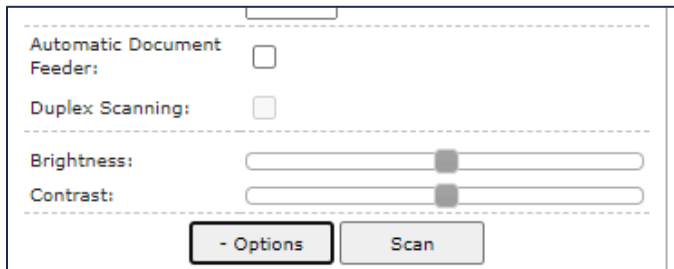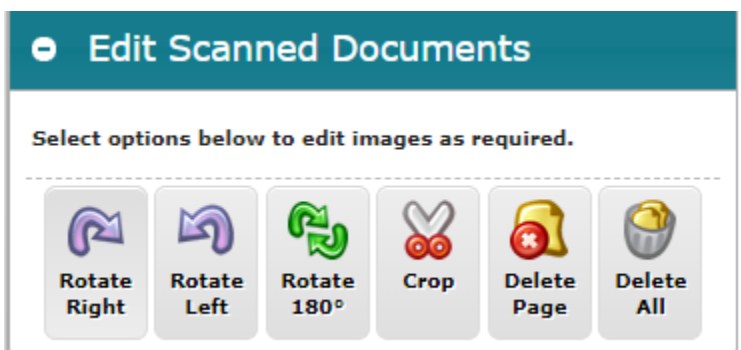**This e-mail or document(s) is being shared in trust.**

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.
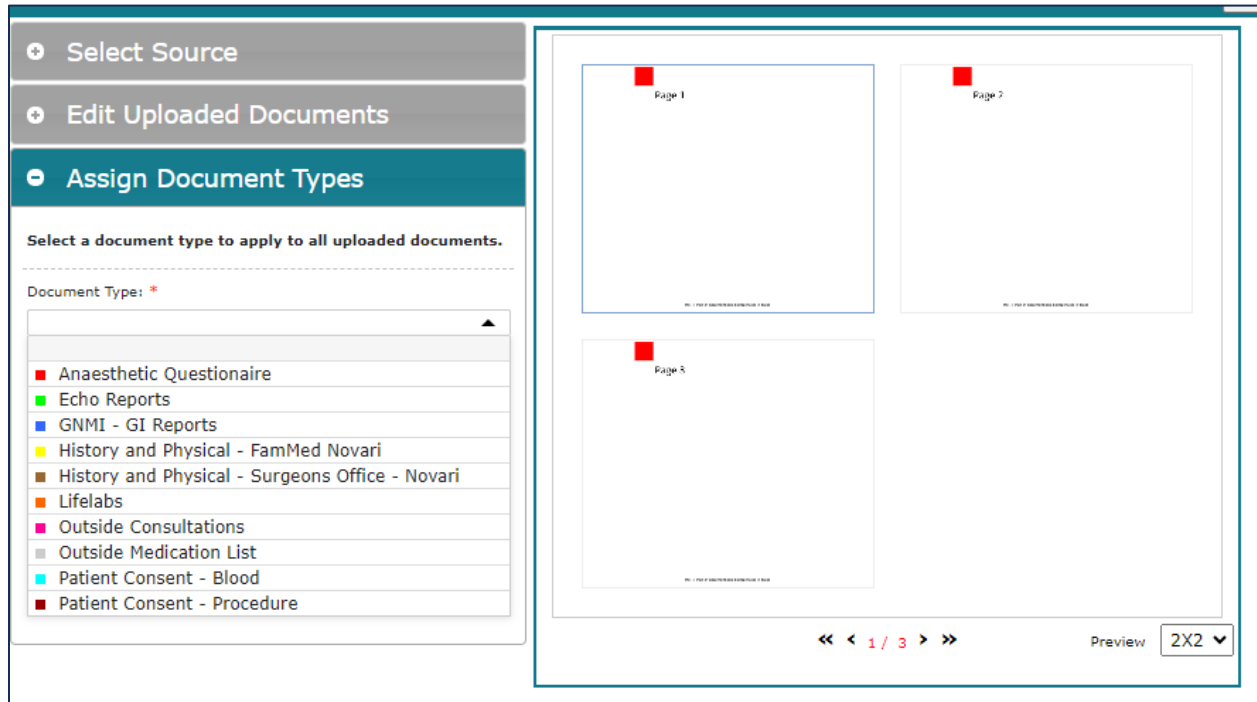

Select Options to review the additional options.

Once Scanned, Edit as needed.

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

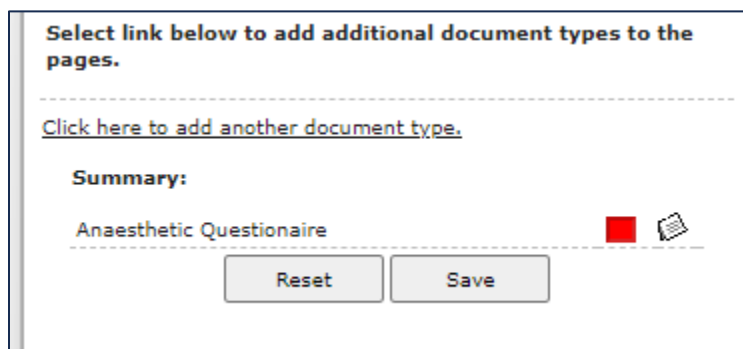Assign the appropriate document type from the drop down list.

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.

This e-mail or document(s) is being shared in trust.
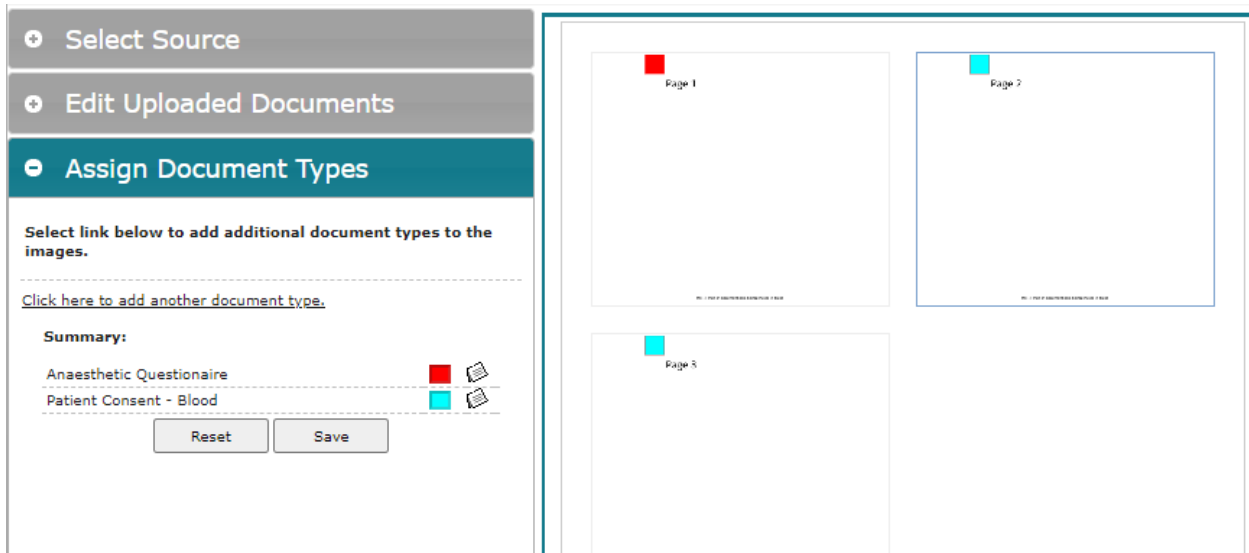
The second page (blue) is now the start of the Patient Consent – Blood. Continue until all document types are assigned and select Save.

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.
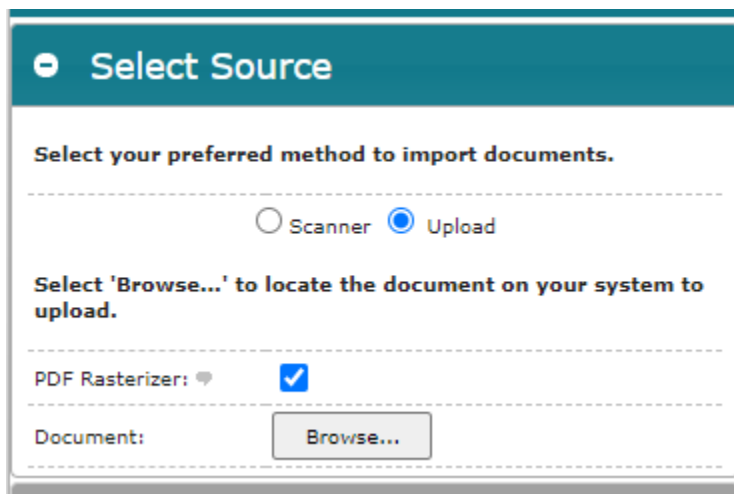
Complete adding all attachments as per scanning process.

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.

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	
☐	🔴		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:
[Novari General Hospital ▾]

Select Service:
[▾]

Select Provider:
[▾]

[Request Transfer] [Cancel]

Transfer Patients

	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
☐	🔴		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.

Inbound Requests
Transfer from Pool to List
No pending requests
Pooled Case Responsibility Transfer
No pending requests
Transfer from List to List (not pooled)
No pending requests

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)

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	OR	Pending Cancel

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Transfers appear in the receiving provider Task List or can be found under the drop-down menu of List.
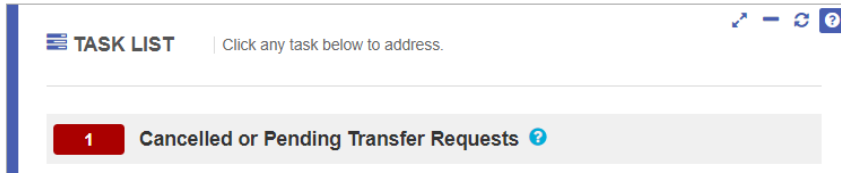
Providers are notified of incoming transfer requests upon viewing the Elective Surgical Wait List. Alternatively, select Transfers from the List drop down menu. If needed, log into receiving provider to accept the transfer.
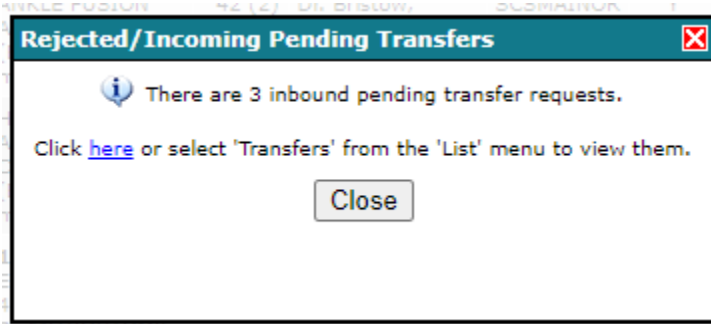
Incoming transfers can be accepted or rejected.

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.

Select the Care Venue.

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

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

test-nhs-waitlist.ca.novarihealth.net says

Warning! Changing the care venue may clear data for the following fields:
- Admission Venue
- Post Procedural Destination
Are you sure you want to change the care venue?

OK   Cancel
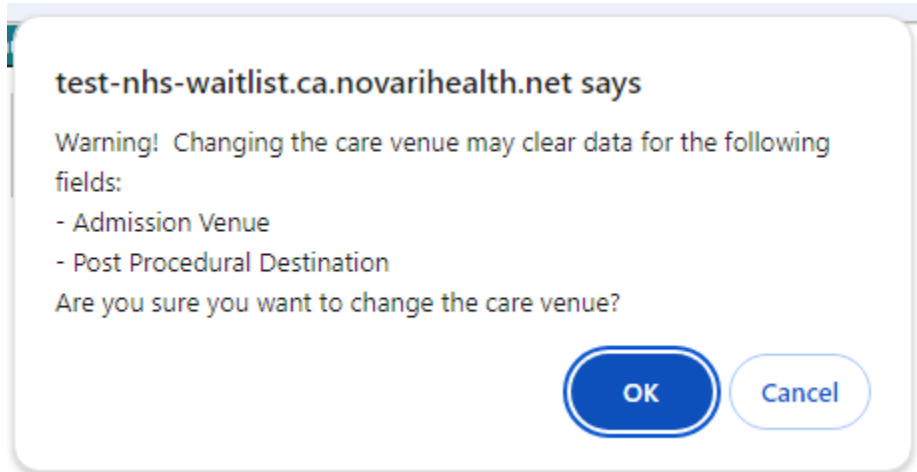
This case is now associated to the new Care Venue.

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.

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.

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

Confirm the Follow-up Case Information in Step 2.

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

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

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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 it 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?*(?)	○ Yes ● No
Bowel Preparation Type*(?)	none

Prior Inadequate/Incomplete Colonoscopy

Prior Inadequate/Incomplete Colonoscopy*(?)	○ Yes ● No
Poor Prep(?)	☐
Failed Cecal Intubation(?)	☐
Failure to Clear All Polyps or Incomplete Polypectomy(?)	☐

Secondary Reason for Colonoscopy

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

[Update] [Cancel]

(* 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.

Generic Novari ATC Registration Module
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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.

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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.