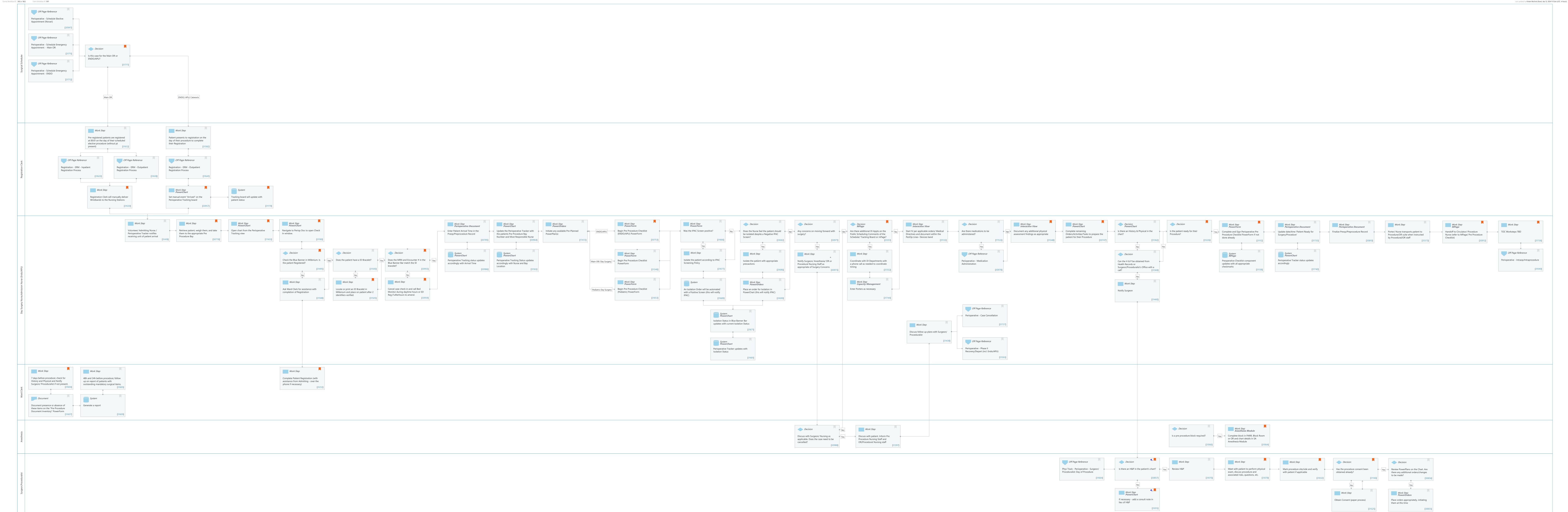


re State: Perioperative - Pre Procedι



Cerner Workflow ID: 505 (v. 18.0) Client Workflow ID: 1011

#### Last updated by Kristen Boichuk (Doan), Apr 12, 2024 11:17am (UTC -4 hours)

## **Workflow Details:**

Workflow Name:	Perioperative - Pre Procedure
Workflow State:	Future State
Workstream:	Intradepartmental
Venue:	Perioperative
Client Owner:	Boichuk (Doan), Kristen Rachel
Cerner Owner:	Chariton,Caitlin M
Standard:	Yes
Related Workflow(s):	
Tags:	

## **Workflow Summary:**

Service Line:	
Related Solution(s):	Anesthesia Management
	Surgical Management
Project Name:	Niagara Health System:OPT-0297674:NIAG_CD Niagara HIS RFP
TestBuilder Script(s):	
Cerner Workflow ID:	505 (v. 18.0)
Client Workflow ID:	1011
Workflow Notes:	This workflow outlines the steps involved in the Preoperative/
	Preprocedure process for patients arriving to the unit from outside
	the hospital. The steps would vary somewhat for emergency or
	inpatient cases.
Introduced By:	WS 1
Validated By:	WS 2

### Swim Lane:

Role(s): Surgical Scheduler [Custom] Department(s): Security Position(s):

## Off Page Reference [30947]

Workflow Link: Perioperative - Schedule Elective Appointment (Novari)

## Off Page Reference [31711]

Workflow Link: Perioperative - Schedule Emergency Appointment - Main OR

## **Decision** [31717]

Description: Is this case for the Main OR or ENDO/APU? Comments: At the time of Surgical Scheduling, appointments are linked to an



encounter and if a new encounter needs to be created (i.e. for a patient coming in as an outpatient on a new encounter) this will be done at the time of scheduling.

All patients will be Pre-Registered or Pre- Admitted by the time they come into the hospital on the day of their procedure.

What varies, will be how their registration gets completed.

# Off Page Reference [31712]

Workflow Link: Perioperative - Schedule Emergency Appointment - ENDO

## Swim Lane:

Role(s): Registration Clerk Department(s): Security Position(s):

# Work Step [31612]

Description: Pre-registered patients are registered at 00:01 on the day of their scheduled elective procedure (without pt present)

# Work Step [31582]

Description: Patient presents to registration on the day of their procedure to complete their Registration

# Off Page Reference [31623]

Workflow Link: Registration - ERM - Inpatient Registration Process

# Off Page Reference [31618]

Workflow Link: Registration - ERM - Outpatient Registration Process

# Off Page Reference [31641]

Workflow Link: Registration - ERM - Outpatient Registration Process

## Work Step [31630]

Description: Registration Clerk will manually deliver Wristbands to the Nursing Stations Comments: Follow up on this workstep



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# Work Step [30957]

Description: Set manual event "Arrived" on the Perioperative Tracking board Method: PowerChart

Comments: Arrived: Patient is ready to begin the next PreOp phase of care ( Endo Admit Nurse, Day Surgery Nurse, Day Surgery Pediatric Nurse, APU Admit Nurse).

# System [31179]

Description: Tracking board will update with patient status Comments: This will indicate to the preoperative nurse that the patient is ready to be seen

# Swim Lane:

Role(s): Day Surgery Nurse [Custom] Admission Nurse (Endo/APU) [Custom]

Department(s): Security Position(s):

# Work Step [31418]

Description: Volunteer/ Admitting Nurse / Perioperative Tracker notifies receiving unit of patient arrival

## Work Step [30778]

Description: Retrieve patient, weigh them, and take them to the appropriate Pre Procedure Bay Comments: Weight will be documented later during physical assessment.

# Work Step [17433]

Description: Open chart from the Perioperative Tracking view Method: PowerChart

Comments: This can help in instances when a single Preop/SDS department serves multiple surgical departments, allowing all their cases to display in a single list without switching areas.

# Work Step [31190]

Description: Navigate to Periop Doc to open Check In window.

- Method: PowerChart
- Comments: Case check in should only occur if the preprocedure nurse has confirmed that the patient FIN is correct and that patient has no



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obvious contraindications for surgery.

Note: Check-in should occur within PowerChart on Case Selection screen or when prompted while opening a Surgical Case.

## Work Step [30785]

Description: Enter Patient Arrival Time in the Preop/Preprocedure Record Method: Perioperative Document

## Work Step [30964]

Description: Update the Perioperative Tracker with the patients Pre Procedure Bay Number and Most Responsible Nurse

Method: PowerChart

### Work Step [17472]

Description: Initiate any available Pre-Planned PowerPlan(s) Method: PowerOrders

### Work Step [30753]

Description: Begin Pre Procedure Checklist (ENDO/APU) PowerForm Method: PowerForm Comments:

### Work Step [31666]

Description: Was the IPAC Screen positive? Method: PowerForm

### **Decision** [31692]

Description: Does the Nurse feel the patient should be isolated despite a Negative IPAC Screen?

### **Decision** [30971]

Description: Any concerns on moving forward with surgery?

### **Decision** [31351]

Description: Are there additional DI Appts on the Public Scheduling Comments of the Schedule/ Tracking Board or mPage?



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## Method: MPage

Comments: (i.e. XR/Mammo/US/NucMed/Lab)

## Work Step [31133]

Description: Start IV per applicable orders/ Medical Directives and document within the PeriOp Lines- Devices band

Method: Interactive View

### **Decision** [17533]

Description: Are there medications to be administered?

### Work Step [31348]

Description: Document any additional physical assessment findings as appropriate Method: Interactive View

Comments: Physical assessment charted in the appropriate IView Band including Weight measured when patient arrived.

Note: Continuing assessments and monitored patient data are documented through IView. Examples of this may include patient recurring vitals and pain scales.

## Work Step [30747]

Description: Complete remaining Orders/Activities/Tasks to prepare the patient for their Procedure

Method: PowerChart

Comments: If patient has reported a historical implant, document this manually in the implant history component.

### **Decision** [31362]

Description: Is there an History & Physical in the chart? Method: PowerChart

#### **Decision** [31226]

Description: Is the patient ready for their Procedure?

Comments: By checking on various elements in the checklist or from status updates on the tracking board, the nurse can determine if the patient has been seen by appropriate physicians. The workflow should not continue unless/until all 3 swimlanes arrive at this



#### step.

At NH the Surgeon doesnt always see the patient until it is their turn to go in to the OR.

# Work Step [31112]

- Description: Complete and Sign Perioperative Pre Procedure Checklist PowerForm if not done already
  - Method: PowerForm
- Comments: Most importantly, the protocols section of the checklist should be completed. This piece of the form must be completed near the end of the process, as it involves verification of procedure site marking, consents obtained, etc.

# Work Step [31735]

Description: Update date/time 'Patient Ready for Surgery/Procedure' Method: Perioperative Document

# Work Step [30810]

Description: Finalize Preop/Preprocedure Record Method: Perioperative Document

## Work Step [31373]

Description: Porter/ Nurse transports patient to Procedure/OR suite when instructed by Procedural/OR staff

# Work Step [30912]

- Description: Handoff to Circulator/ Procedure Nurse (refer to MPage/ Pre Procedure Checklist) Method: MPage
- Comments: Utilize the Perioperative Summary to provide handoff communication to the Circulator

## Work Step [31736]

Description: TOC Worksteps TBD

Comments: Awaiting further direction from leadership on what Nursing to Nursing TOC policy procedure/ system documentation will look like.

## **Decision** [31495]

Description: Check the Blue Banner in Millenium. Is the patient Registered?



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Comments: Check the Blue Banner to see what Encounter Type the patient has. If the registration says "Pre Reg" or "Pre Admit" they have not been fully registered yet.

### **Decision** [31500]

Description: Does the patient have a ID Bracelet?

#### **Decision** [30955]

Description: Does the MRN and Encounter # in the Blue Banner Bar match the ID bracelet? Comments: Verify patient FIN against patient wrist band.

#### Work Step [31677]

Description: Isolate the patient according to IPAC Screening Policy

#### Off Page Reference [31040]

Workflow Link: Perioperative - Intraop/Intraprocedure

#### System [30986]

Description: Perioperative Tracking status updates accordingly with Arrival Time Method: PowerChart

## **System** [31165]

Description: Perioperative Tracking Status updates accordingly with Nurse and Bay Location Method: PowerChart

#### Work Step [31346]

Description: Begin Pre Procedure Checklist PowerForm Method: PowerForm

#### Work Step [31696]

Description: Isolate the patient with appropriate precautions

#### Work Step [30973]

Description: Notify Surgeon/ Anesthesia/ OR or Procedural Nursing Staff as appropriate of Surgery Concerns

### Work Step [31352]

Description: Coordinate with DI Departments with a phone call as needed to coordinate timing



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### Off Page Reference [30978]

Workflow Link: Perioperative - Medication Administration

#### **Decision** [31369]

Description: Can the H & P be obtained from Health Records or Surgeon/Proceduralist's Office with a call?

#### **System** [31138]

Description: Preoperative Checklist component updates with all appropriate checkmarks Method: MPage

#### **System** [31740]

Description: Perioperative Tracker status updates accordingly Method: PowerChart

#### Work Step [31588]

Description: Ask Ward Clerk for assistance with completion of Registration

#### Work Step [31505]

- Description: Locate or print an ID Bracelet in Millenium and place on patient after 2 identifiers verified.
- Comments: To be determined if this can be run as an ops job at time of Registration to print in appropriate areas or if Registration will deliver ID bands (this will be followed up/ clarified later)

#### Work Step [30959]

- Description: Cancel case check in and call Bed Monitor during daytime hours or ED Reg if afterhours to amend.
- Comments: Correcting the FIN can be done by performing a 'reschedule' action within the Appointment Book. During this process, break the existing encounter relationship and choose the correct encounter when confirming the appointment.

Ideally the Periop Nurse would have security to perform this action; however, they could instead contact the Scheduler or Charge Nurse to have them perform this action if necessary.



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#### Work Step [31653]

Description: Begin Pre Procedure Checklist (Pediatric) PowerForm Method: PowerForm

#### **System** [31689]

Description: An Isolation Order will be automated with a Positive Screen (this will notify IPAC)

#### Work Step [31699]

Description: Place an order for Isolation in PowerChart (this will notify IPAC) Method: PowerOrders

#### Work Step [31744]

Description: Enter Porters as necessary Method: Capacity Management

### Work Step [31460]

Description: Notify Surgeon

### Off Page Reference [31737]

Workflow Link: Perioperative - Case Cancellation

#### System [31671]

Description: Isolation Status in Blue Banner Bar updates with current Isolation Status Method: PowerChart

#### Work Step [31438]

Description: Discuss follow up plans with Surgeon/ Proceduralist

## System [31681]

Description: Perioperative Tracker updates with Isolation Status Method: PowerChart

#### Off Page Reference [31593]

Workflow Link: Perioperative - Phase II Recovery/Depart (incl. Endo/APU)

## Swim Lane:

Role(s): Ward Clerk [Custom] Department(s):



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### Security Position(s):

# Work Step [31604]

- Description: 7 days before procedure; check for History and Physical and Notify Surgeon/ Proceduralist if not present.
- Comments: Ward Clerk checks for: Procedural Consent, History and Physical (for Dental Procedures Anesthesia Consults are accepted), Blood Consent ( depending on the Procedure Scheduled), Surgeon and Anesthesia Orders 7 days in advance of procedure.

## Work Step [31605]

Description: 48h and 24h before procedure; follow up on report of patients with outstanding mandatory surgical items.

## Work Step [31212]

Description: Complete Patient Registration (with assistance from Admitting - over the phone if necessary)

Comments: Verify/Complete demographic and encounter information

### **Document** [31607]

Description: Document presence or absence of these items on the "Pre Procedure Document Inventory" PowerForm

## System [31609]

Description: Generate a report

## Swim Lane:

Role(s): Anesthesia

Department(s): Security Position(s):

# **Decision** [30988]

Description: Discuss with Surgeon/ Nursing as applicable. Does the case need to be cancelled?

## Work Step [31397]

Description: Discuss with patient. Inform Pre Procedure Nursing Staff and OR/Procedural Nursing staff



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#### **Decision** [31060]

Description: Is a pre procedure block required?

## Work Step [31064]

Description: Complete block in PARR, Block Room or OR and chart details in SA Anesthesia Module

Method: Anesthesia Module

Comments: Do not start the professional time, simply chart any necessary meds/ actions related to the procedure performed in preop.

#### Swim Lane:

Role(s): Surgeon Proceduralist

Department(s): Security Position(s):

### Off Page Reference [31664]

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

### **Decision** [30857]

Description: Is there an H&P in the patient's chart?

Step Impact: Regulatory

- Regulatory Details: Conditions of Participation The Joint Commission (TJC)
  - Comments: H&P must be documented in the chart within 30 days prior to surgery per CMS and TJC.

Exceptions are allowed when the patient is receiving an outpatient surgical or procedural

service and when the medical staff has developed and maintained a policy (in accordance with §482.22(c)(5)(v)/§482.24(c)(4(i)) that identifies specific patients that do not require a comprehensive medical H&P, or any update to it, prior to the outpatient surgery or procedure.

Reference CFR here and here for specific details for both outpatient and inpatient.

TJC Provision of Care Chapter 01.02.03 EP 5 also details these requirements as



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well as TJC Medical Staff Chapter 03.01.01.

The surgeon/proceduralist typically sees the patient after nursing and anesthesia have completed the bulk of their activities, but this can occur at any time during the Preop process.

# Work Step [31076]

Description: Review H&P

# Work Step [31078]

Description: Meet with patient to perform physical exam, discuss procedure and associated risks, questions, etc.

Comments: The surgeon may see the patient in Pre Op but if not, this discussion could occur before the day of surgery or in the OR before the patient goes under anesthesia.

## Work Step [31032]

Description: Mark procedure site/side and verify with patient if applicable

Comments: If the procedure site/side is not verified in PreOp then this step could also occur in the OR before the patient goes under anesthesia.

## **Decision** [31146]

Description: Has the procedure consent been obtained already? Comments: Ideally, the procedure consent can be obtained in advance from the surgeon's office.

## **Decision** [30856]

Description: Review PowerPlans on the Chart. Are there any additional orders/changes to be made?

# Work Step [31015]

Description: If necessary - add a consult note in lieu of H&P

Method: PowerChart

Step Impact: Regulatory

Regulatory Details: Conditions of Participation

The Joint Commission (TJC)

Comments: H&P must be documented in the chart within 30 days prior to surgery



per CMS and TJC.

Exceptions are allowed when the patient is receiving an outpatient surgical or procedural

services and when the medical staff has developed and maintained a policy (in accordance with §482.22(c)(5)(v)/§482.24(c)(4(i)) that identifies specific patients that do not require a comprehensive medical H&P, or any update to it, prior to the outpatient surgery or procedure.

Reference CFR here and here for specific details for both outpatient and inpatient.

TJC Provision of Care Chapter 01.02.03 EP 5 also details these requirements as well as TJC Medical Staff Chapter 03.01.01.

## Work Step [31525]

Description: Obtain Consent (paper process)

### Work Step [30855]

Description: Place orders appropriately, initiating them at this time Method: PowerOrders

## **Facilities:**

Facility Name: Niagara Falls Site Status: Approved Facility Cerner Owner: Kearns,Caitlin M Facility Client Owner: Boichuk (Doan), Kristen Rachel Authorize Date: Jan 10, 2024 Facility Comments:

Facility Name: St. Catharines Status: Approved Facility Cerner Owner: Kearns,Caitlin M Facility Client Owner: Boichuk (Doan), Kristen Rachel Authorize Date: Jan 10, 2024 Facility Comments:

> Facility Name: Welland Status: Approved



Niagara Health System

# Future State: Perioperative - Pre Procedure

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Facility Cerner Owner: Kearns, Caitlin M Facility Client Owner: Boichuk (Doan), Kristen Rachel Authorize Date: Jan 10, 2024 **Facility Comments:** 

