



## Future State: Phys Track - Perioperative - Surgeon/ Proceduralist: Day of Procedure

Cerner Workflow ID: 10943 (v. 12.0) Client Workflow ID: 1039

Last updated by Tina Van Egmond, Jun 07, 2024 6:50pm (UTC -4 hours)

**Workflow Details:**

Workflow Name: Phys Track - Perioperative - Surgeon/ Proceduralist: Day of 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: Cardiothoracic Surgery  
 Colon & Rectal Surgery  
 Gastroenterology  
 General Surgery  
 Neurosurgery  
 Ophthalmology  
 Orthopedics  
 Otolaryngology  
 Pediatric Gastroenterology  
 Pediatric Surgery  
 Plastic Surgery  
 Podiatry  
 Trauma Surgery  
 Urology  
 Vascular Surgery

Related Solution(s): Surgical Management

Project Name: Niagara Health System:OPT-0297674:NIAG\_CD Niagara HIS RFP

TestBuilder Script(s):

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Workflow Notes: This workflow accounts for the surgeon's typical workflow on the day of surgery. It includes several required regulatory steps, each which reference the specific CMS or other regulation in the comments for the work step.

This workflow is related to the following workflow(s):

- "Provider Workflow - 2 Midnight Rule"
- "Transitions - Inpatient to Surgery"
- "Transitions - Perioperative AM Admit"

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Introduced By: WS 3

Validated By: WS 6

**Swim Lane:**Role(s): Surgeon  
Proceduralist

Department(s):

Security Position(s): Physician - Cardiothoracic Surgery  
Physician - Cardiovascular  
Physician - Colon and Rectal Surgery  
Physician - Gastroenterology  
Physician - General Surgery  
Physician - Neurosurgery  
Physician - Orthopaedic Surgery  
Physician - Plastic Surgery  
Physician - Podiatry  
Physician - Trauma Surgery  
Physician - Vascular Surgery**Start/Stop [3]**

Description: Pre-Procedure: Date of Surgery/ Procedure

Comments: This workflow assumes that the surgeon has already ordered the procedure order and multi-phase PowerPlan for the day of surgery. Refer to "Perioperative - Schedule Procedure" workflow for more information.

**Decision [294]**

Description: Are SURG &amp; PAO PowerPlans already on the chart in a planned state?

Comments: For the Endoscopy Team, orders will not be placed in a planned state before the day of procedure as the lists are changing frequently.

**Work Step [4]**

Description: Open patient chart and review SURG PowerPlans already placed in a planned state. Make order modifications if necessary

Comments: Surgeons will plan SURG (phased) PowerPlans on the patient's order profile anytime after the encounter has been created. Encounters are created as the case is scheduled within Millennium by Surgical

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Schedulers.

7 Days Pre Procedure, Ward Clerks will check for any outstanding orders and follow up with Surgeons who have not yet placed orders in a planned state. This will be done again at 48h and 24h before the day of procedure.

**Decision [35]**

Description: Is the History and Physical on the chart as per organizational timeframe policy?

Value Impact: Patient Safety

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

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 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.

**Work Step [5]**

Description: Review and update History and Physical Note, as needed

Method: PowerChart

Value Impact: Patient Safety

Step Impact: Policy/Procedure

Comments: Prescriber pre-operative documentation is required for all procedures.

Prescribers should addend the Admission H&P on the day of surgery to indicate whether or not the patient's condition has changed since the H&P was originally documented.

**Work Step [6]**

Description: Meet with patient for health teaching, exam, mark surgical site (if applicable). Obtain Procedure Consent if not already complete.

Comments: In most cases, consent will be obtained before day of surgery at the time of booking (paper process). If consent hasn't been captured before day of surgery, it needs to be captured at this time.

eSignature is not available at this time.

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**Decision [296]**

Description: Is this patient planned to be admitted post-operatively?

**Work Step [299]**

Description: INITIATE "Admit to Day Surgery" order in the "Patient Admission Orders" PowerPlan and plan SURG (phased) PowerPlan(s)

**Work Step [252]**

Description: Navigate to Inpatient Workflow MPage to create an Admission H&P Note

Method: MPage

**Decision [333]**

Description: Obtain Blood Consent if indicated or incomplete. Is there a >10% chance of this patient requiring a transfusion?

Comments: In most cases, consent will be obtained before day of surgery at the time of booking (paper process). If consent hasn't been captured before day of surgery, it needs to be captured at this time.

eSignature is not available at this time.

**Off Page Reference [332]**

Workflow Link: Perioperative - Anesthesiology - Blood Transfusion in OR

**Work Step [60]**

Description: PLAN "Admit to Inpatient" order in the "Patient Admission Orders" PowerPlan and SURG (phased) PowerPlan(s)

Method: PowerOrders

**Swim Lane:**

Role(s): Surgeon  
Proceduralist

Department(s):

Security Position(s): Physician - Cardiothoracic Surgery  
Physician - Colon and Rectal Surgery  
Physician - Gastroenterology  
Physician - General Surgery  
Physician - Neurosurgery

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Physician - Orthopaedic Surgery  
Physician - Plastic Surgery  
Physician - Sports Medicine  
Physician - Vascular Surgery

**Work Step [8]**

Description: Intra-op/ Intraprocedure: Participate in time-out, perform surgery/ procedure and participate in debrief

**Decision [322]**

Description: Will the proceduralist be participating in Medication Administration during Procedural Sedation?

**Decision [325]**

Description: Will images be captured during the procedure?

**Work Step [256]**

Description: Provide Verbal Orders for Co-Signature in the Operating Room for medications required during the procedure

**Off Page Reference [321]**

Workflow Link: Perioperative - Procedural Sedation (Endoscopy/ APU)

**Off Page Reference [316]**

Workflow Link: Perioperative - Surgical and Endoscopic Imaging

**Swim Lane:**

Role(s): Surgeon  
Proceduralist

Department(s):

Security Position(s): Physician - Cardiothoracic Surgery  
Physician - Colon and Rectal Surgery  
Physician - Gastroenterology  
Physician - General Surgery  
Physician - Neurosurgery  
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**Work Step [10]**

Description: Post-Operative: Review Recovery phases of SURG PowerPlan and modify if required (reconciling with Anesthesia PowerPlans)

Method: PowerOrders

Comments: Surgeons should always be reconciling their orders on the chart as the patient moves through different areas of the surgical workflow ( i.e. surgeons should make sure the orders in the next phase of the order set are correct before the nurse comes into initiate the phase and discontinues the old phase).

**Work Step [9]**

Description: Navigate to Inpatient Workflow MPage and click on the appropriate Dyn Doc hyperlink

Method: PowerChart

Comments: Appropriate Dyn Doc notes to create in this workflow would be a Procedure Note or an Operative Note.

**Work Step [264]**

Description: Complete Op/Procedure Note by clicking into each section and typing or using Dragon Dictation. Click Sign/Submit.

Method: PowerChart

Comments: An Op Note needs to be completed for every patient. Information for Day Surgery Patients that is currently captured on the face sheet for HIM coding purposes will be pulled from this note.

**Decision [214]**

Description: Is this a planned admission that meets criteria for Discharge?

**Work Step [254]**

Description: Click on the 'Home' Icon to access your inbox orders to Co-Sign any Intraop/ Intraprocedure Verbal Orders

**Decision [218]**

Description: Is this a scheduled Same Day Surgery that requires admission to the Inpatient Surgical Floor?

**Decision [370]**

Description: Will you be the MRP for this patient?

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**Work Step [27]**

Description: Initiate "Admit From Day Surgery to Inpatient" order in the PAO PowerPlan and plan a clinical Admission PowerPlan

Method: PowerOrders

Comments: Medical Service and Level of Care information are required fields on this order.

**Work Step [382]**

Description: Using the Inpatient Workflow MPage, assess patient, review chart, complete admission med rec, update problem list, etc.

Comments: Complete all steps required for Admission workflow

**Off Page Reference [312]**

Workflow Link: Phys Track- Medication Process - Admission Medication Reconciliation

**Work Step [385]**

Description: Click "Admission H&P" hyperlink on the Inpatient Workflow mPage to create note

**Work Step [387]**

Description: Modify contents of note as needed. Click Sign/Submit.

**Decision [222]**

Description: Is this a scheduled Same Day Surgery or Surgical Admission that requires a higher level of care?

**Work Step [224]**

Description: Discuss plan with Anesthesia. Anesthesia or Surgeon/ Proceduralist initiates a Physician Consult to engage MRP.

**Work Step [230]**

Description: Surgeon to update Post Operative Phase of SURG PowerPlan if necessary with additional orders

Comments: Nurse to initiate Post Op phase of PowerPlan when patient arrives to post op location.



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**Work Step [232]**

Description: Surgeon will continue to follow the patient until they are suitable for downgrade to Surgical Inpatient Unit

**Off Page Reference [313]**

Workflow Link: Phys Track- Medication Process - Transfer (Change in Level of Care) All Orders Reconciliation

Comments: After Transfer of Care, Surgeon assumes MRP.

**Work Step [244]**

Description: Assess patient and modify orders throughout admission as necessary

**Decision [241]**

Description: Does the patient meet criteria for discharge?

**Work Step [284]**

Description: Navigate to Prescriber View, select the Discharge tab. Search "Discharge Patient" within New Order Entry

**Work Step [269]**

Description: Select the "Orders for Signature" button. Select Modify Details button. Complete details on Order Profile and Sign.

Comments: The Orders for Signature Icon looks like a mail envelop along the top grey bar.

**Work Step [288]**

Description: Navigate to Home Meds component on Discharge MPage. Click on the "Discharge to Home" hyperlink on toolbar to complete Meds Rec

**Off Page Reference [341]**

Workflow Link: Phys Track- Medication Process - Discharge Medication Reconciliation

**Work Step [276]**

Description: Add Special Instructions for Home Medications and Prescriptions as needed

**Work Step [278]**

Description: Add relevant Follow Up instructions in the corresponding component

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**Work Step [281]**

Description: Populate Patient Instructions (i.e. activity restrictions, diet restrictions, return to care if... etc.)

Comments: \_ F3 will allow the prescriber to search pre-made patient education auto text (this works in any free text box)

**Work Step [375]**

Description: Document Discharge "This Visit" Diagnosis in Problem List component if not already done

Comments: Also ensure any chronic problems were previously documented by the nurse in the Problem List component. At least one "This Visit" Discharge Diagnosis and one Chronic Problem/No Known Chronic Problems must be documented to satisfy the Problem List component requirements.

**Work Step [290]**

Description: Complete a Discharge Summary Note

Comments: Discharge summaries are required only for patients who were admitted for 1+ days

**Off Page Reference [354]**

Workflow Link: Phys Track - Transitions - Patient Deceased

**Decision [352]**

Description: Did the patient die?

**System [349]**

Description: All of these elements will pull into the Inpatient Discharge Instructions later provided to the patient

**Swim Lane:**

Role(s): Receiving Prescriber [Custom]

Department(s):

Security Position(s):

**Decision [356]**

Description: Is this a Same Day Surgery patient or existing Inpatient Admission requiring a higher level of care?

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**Work Step** [226]

Description: Consulting Physician completes consult, places "Transfer Patient" order and clinical Admission PowerPlan

**Decision** [238]

Description: Is patient's clinical status now suitable for downgrade to Surgical Inpatient Unit?

**Off Page Reference** [392]

Workflow Link: Phys Track- Medication Process - Transfer (Change in Level of Care) All Orders Reconciliation

Comments: The Receiving Prescriber/MRP is responsible for completing the med rec

**Work Step** [359]

Description: Initiate PAO "Admit from Day Surgery to Inpatient" PowerPlan and a clinical Admission PowerPlan