Scheduling and Surgery work flow

Scheduling Application OverView

Surgical Care Application Overview

Scheduling Content

Surgery Content

Scheduling Application

Adding locations to your Resource list

1. Click the **Find Resource** button
2. Select **Location** from the **Resource Type** drop down menu
3. Select **SUNY Downstate Medical Center** from the **Facility** drop down menu
4. Select **Operating Suite** from the **Unit** drop down menu
5. Click **Search**
6. Select the rooms you want to schedule in
7. Click **Select**
8. Those rooms will appear in your resource list
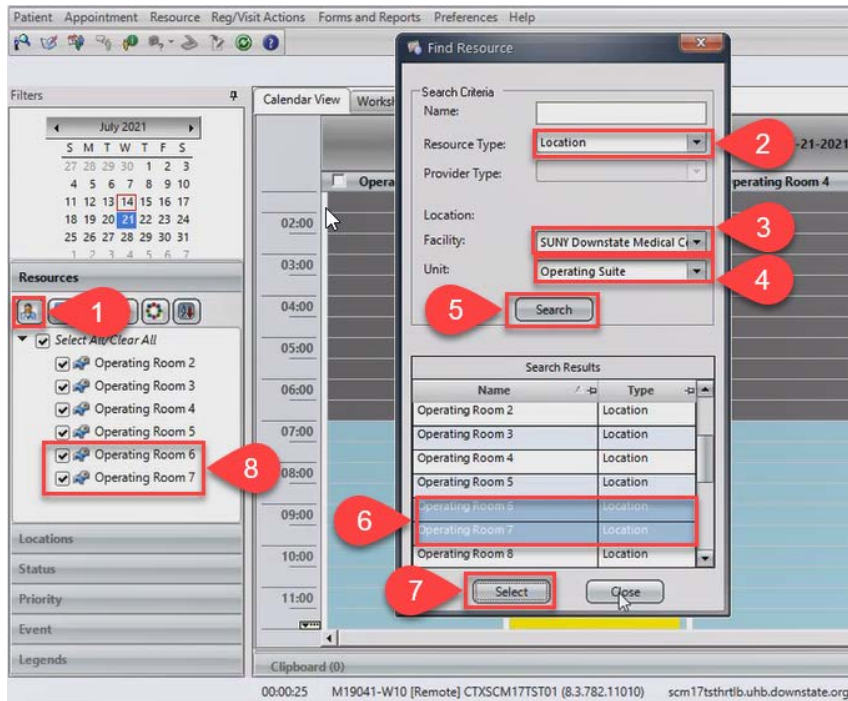
After adding the rooms to your resource list, it is best practice to save that list of rooms for the next time you log into the system. Those rooms will be available for you to work on.

Saving your Resource list

1. Click on **Preferences**
2. Click on **Save Roster by User**
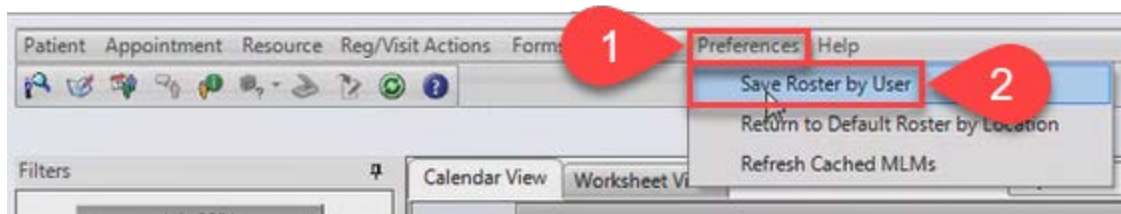
Booking an Appointment

1. Select the date you want to book the appointment
2. Choose a room
3. Right click on the time slot
4. Select **Schedule**
5. And click on **Demand Book**

6. Search the patient by **Last** and **First** name
7. Click **Search**
8. And double click on the patient from the list
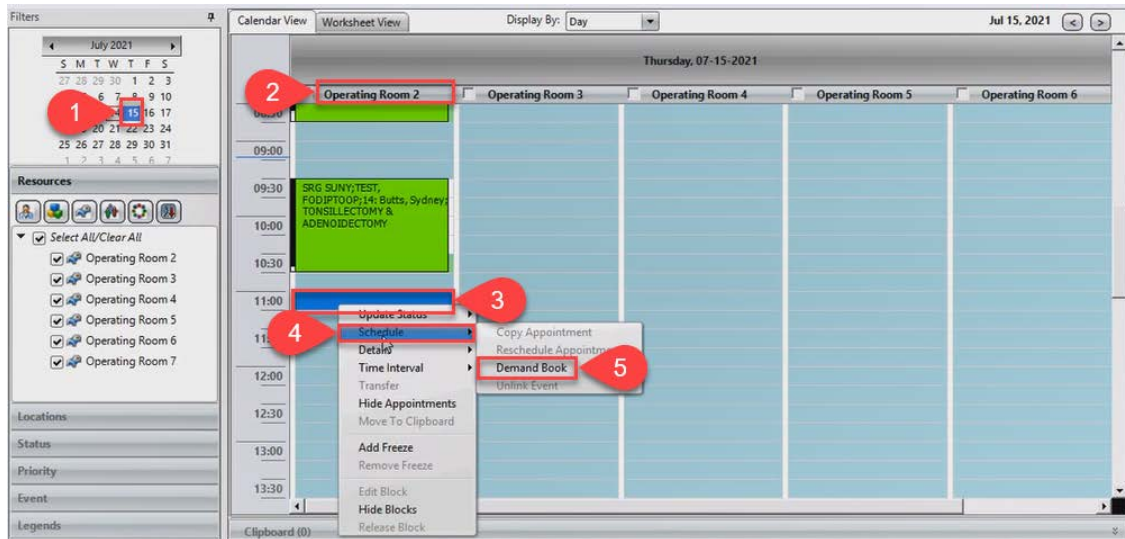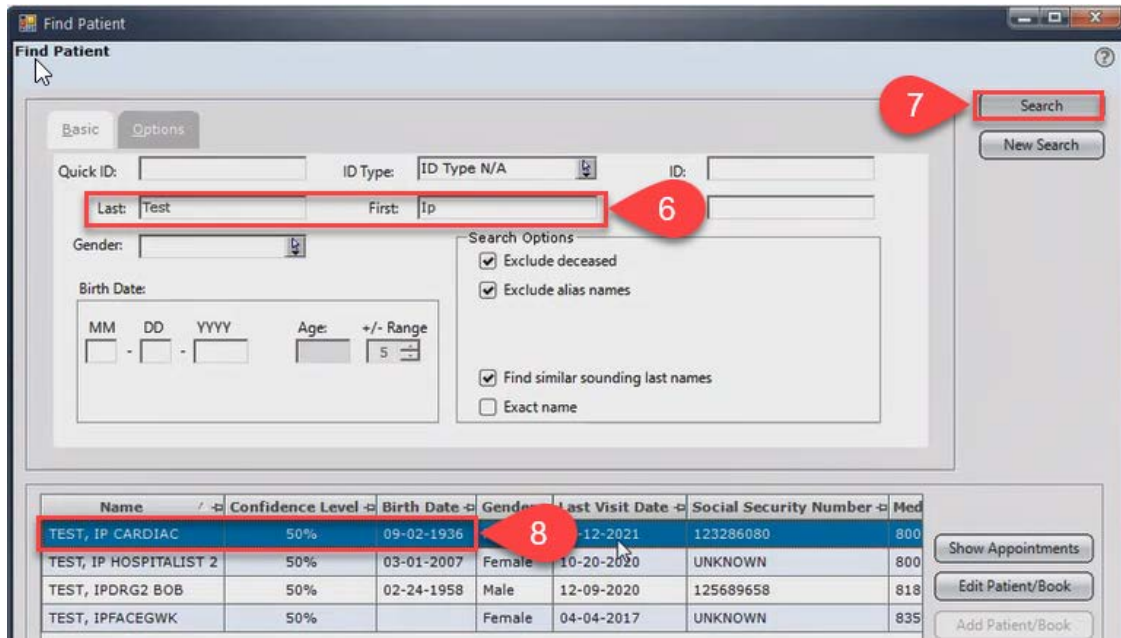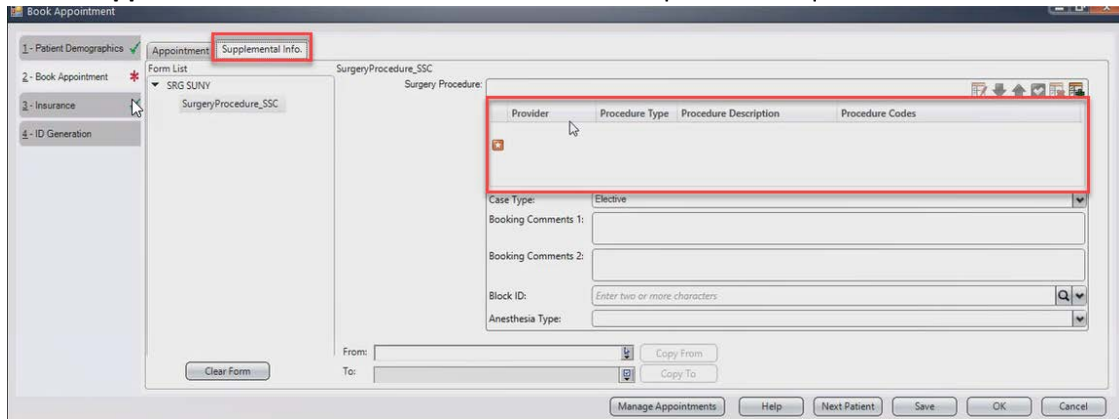
9. Review the **Patient Demographics**. If something needs to be added or changed please inform the registrars to make those changes in Eagle
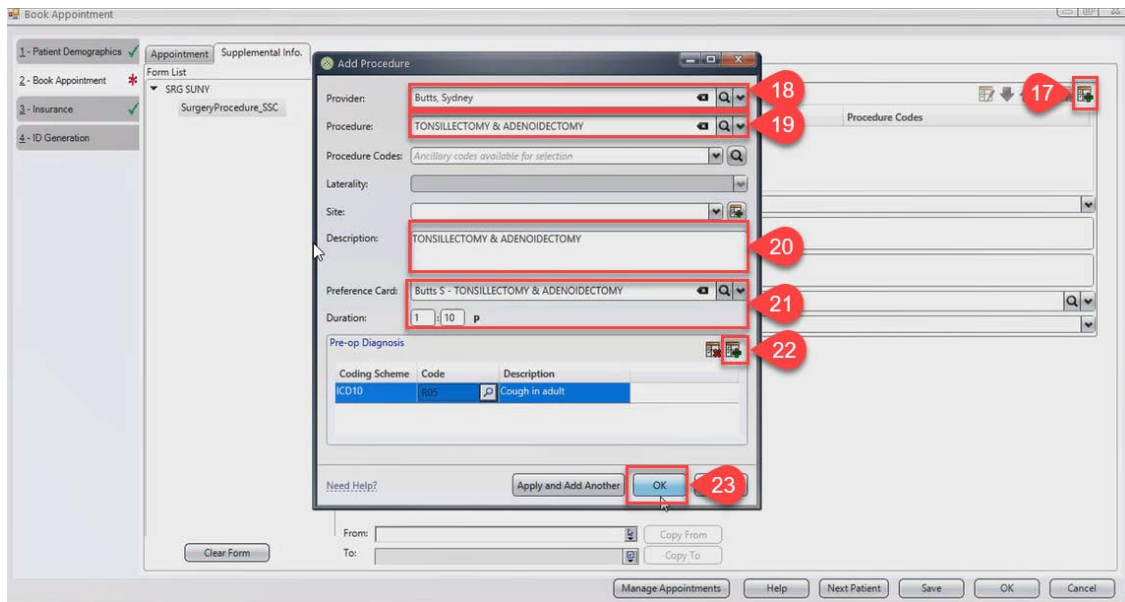

10. Clicking on the **Insurance** section, gives you a **green** check mark indicating you have reviewed the information. Insurance information is completed by the registrars, all you need to do is move on to the **Book Appointment** section

11. Click on the **Book Appointment** section
12. Select **SRG SUNY** from the **Event** drop down menu. **SRG SUNY** is for booking an inpatient/Outpatient surgery and **SRG NORA** is for non-OR Anesthesiology cases. If you are booking in the Bayridge Clinic, you will select **SRG BAYRIDGE**
13. If you know the **Chief Complaint** and have any **Notes** for this appointment you can add it in the text box
14. If you know the **Referring Provider**, **Priority** and **Internal Transportation**, you can add those as well.
15. After complete required fields click on the **Supplemental Info** tab

16. In the **Supplemental Info** section. You will need to complete the required field.
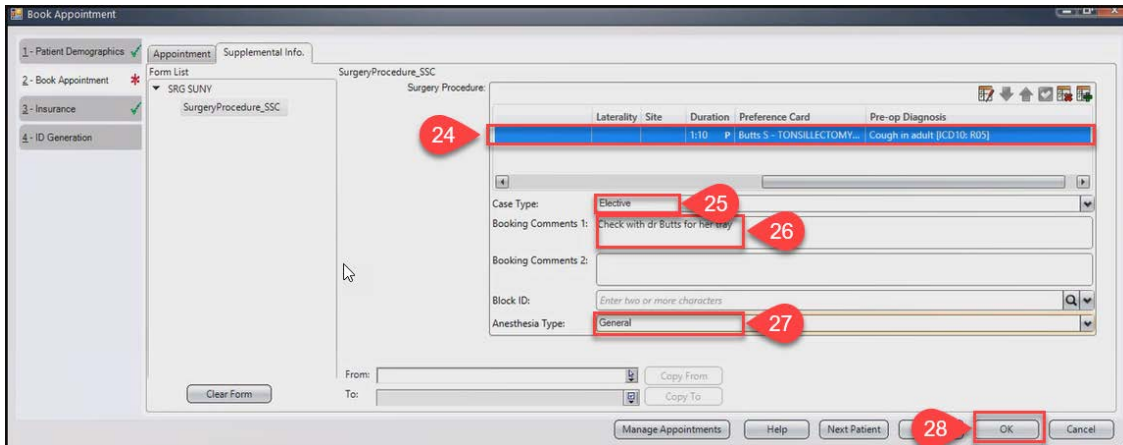

17. Click the Add button
18. Search for the **Provider**
19. Search for the **Procedure** type
20. Add an **Description**
21. The **Preference card** and **Duration** field are automatically populated when the **Provider** and **Procedure** fields have something selected.
22. Click the Add button to add an ICD10 code
23. Then click OK

Note: if you change the Duration, the **P** (Preference Card) will change to **U** (User)

24. The required information is now populated
25. Select the **Case Type**
26. Add additional **Booking Comments**
27. Select the **Anesthesia Type**
28. Click **OK**

29. Review the appointment and click OK to complete the Booking
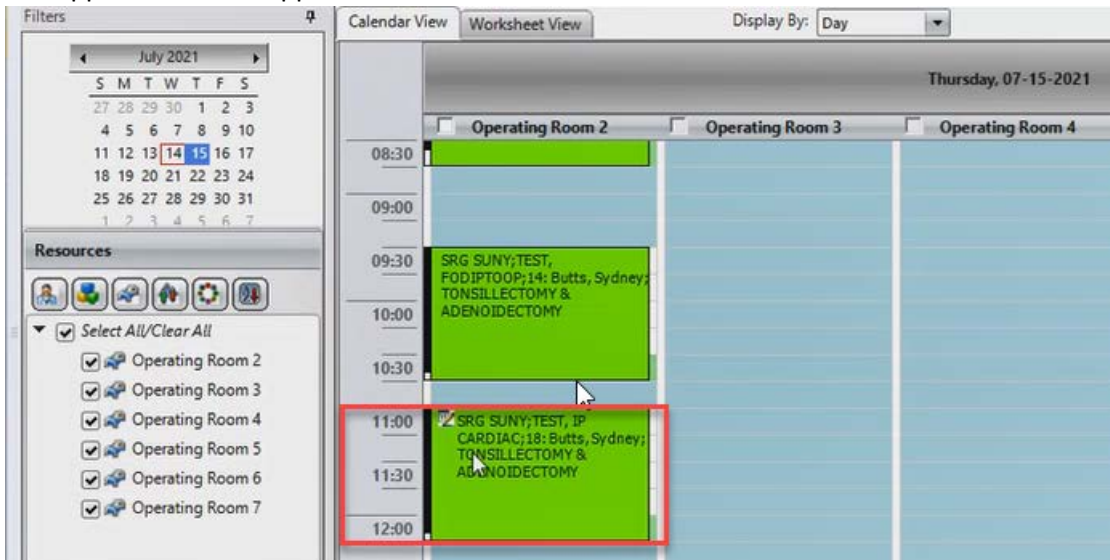
30. The appointment will appear on the calendar

Rescheduling an appointment

1. Click on the **Clipboard** tab
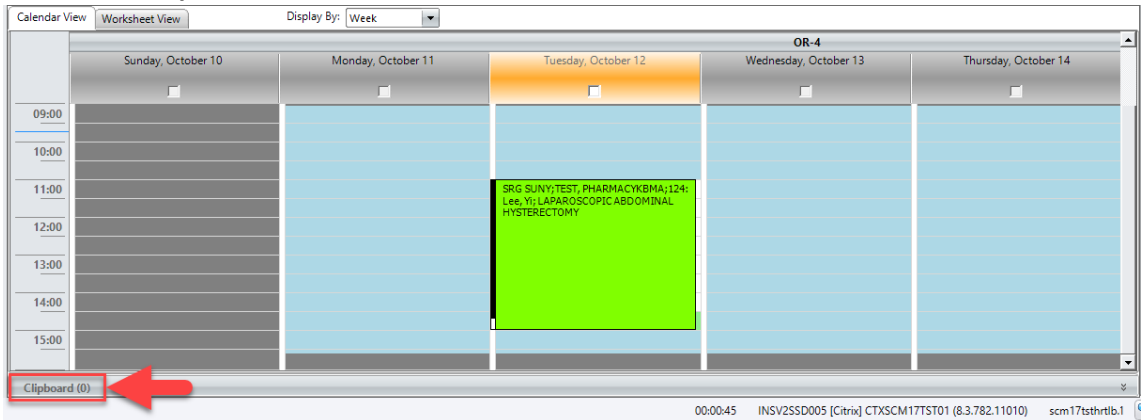
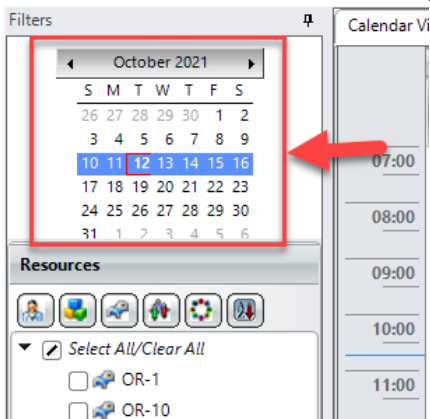2. Click and hold the appointment that you want to reschedule, then drag it into the white space of the clipboard

3. The clipboard will hold the appointment until you are ready to move it to its new time slot
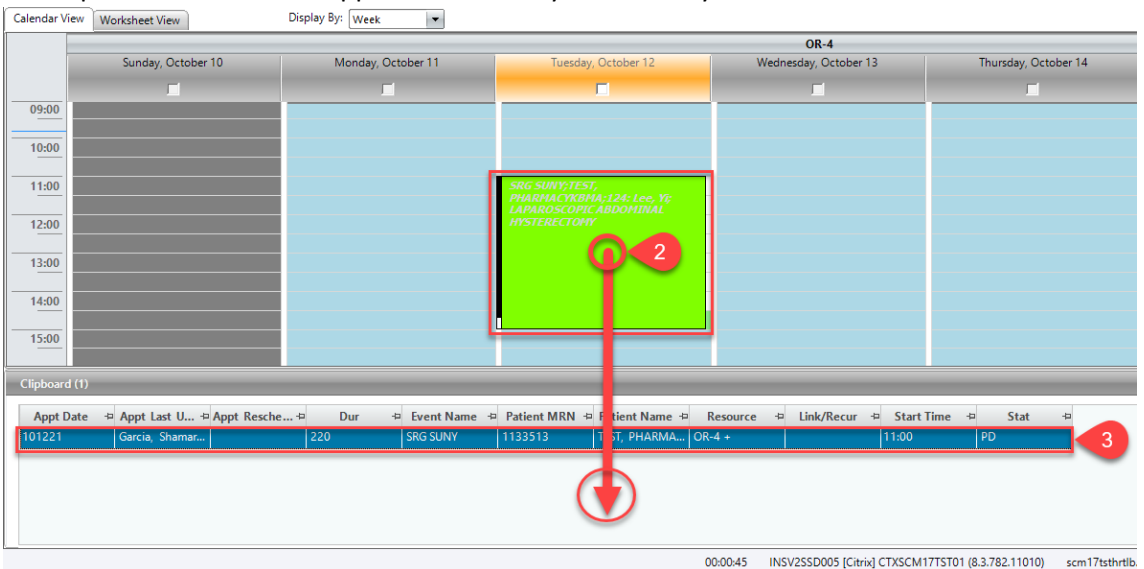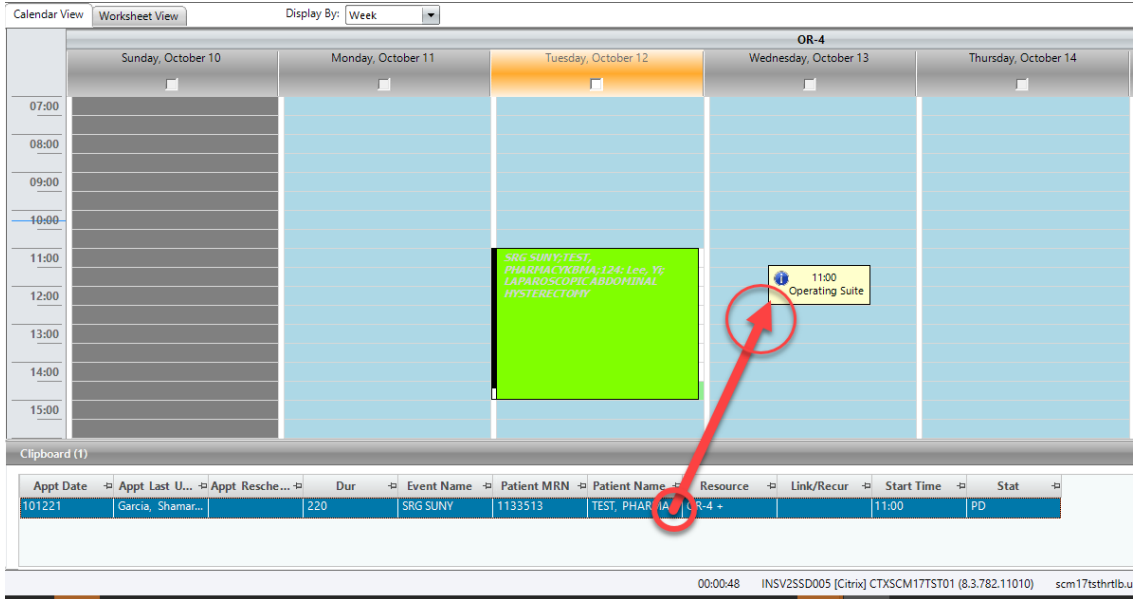

4. Go to the new reschedule date using the calendar in the **Filters** section
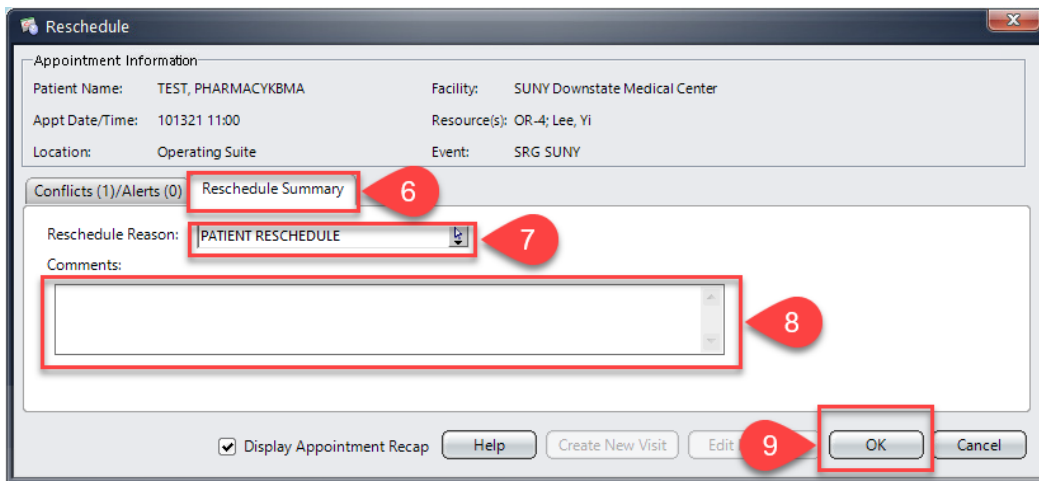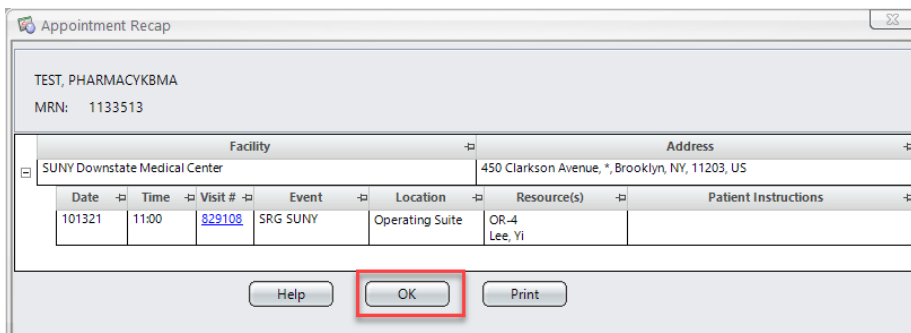
5. Click and hold the appointment in the clipboard, then drag it to the new appointment time slot

6. Click on the **Reschedule Summary** tab
7. Select the **Reschedule Reason** from the dropdown menu
8. Add a comment if needed
9. Then click **OK**

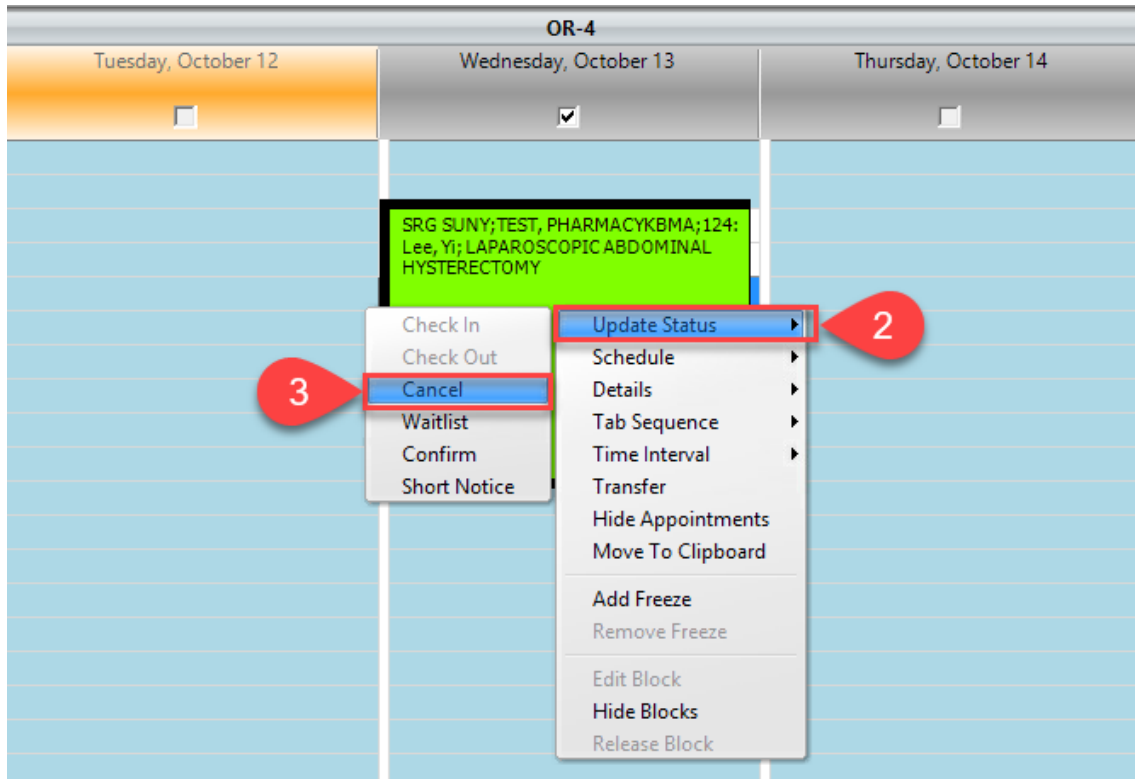10. Review the **Appointment Recap** and then click **OK.** The appointment will now be moved to its new time slot

Cancel Appointment

1. Right click on the appointment that you are canceling
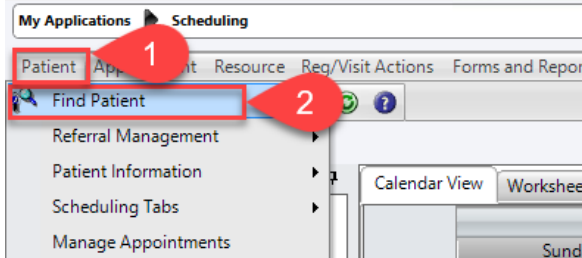2. Select **Update Status**
3. Select **Cancel**

4. Select the **Cancellation Reason** from the dropdown menu
5. Add a comment if needed
6. Review the **Selected Appointment that will be Cancelled**
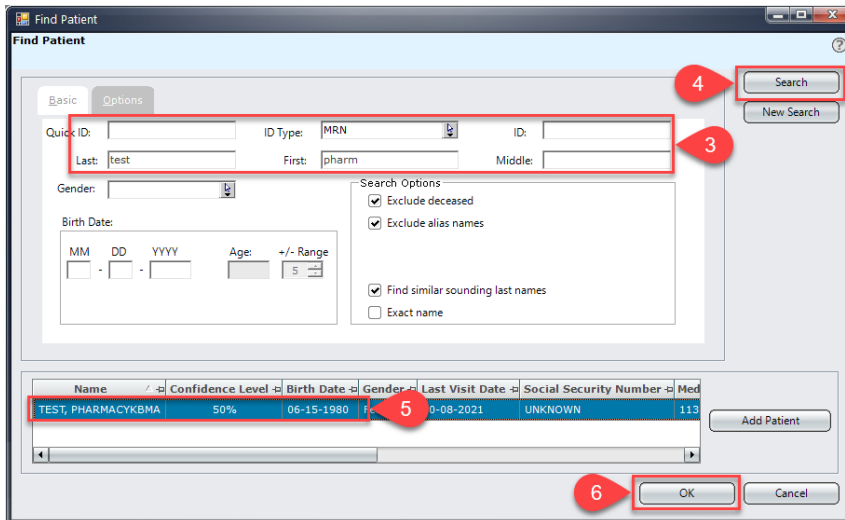7. Then click **OK**
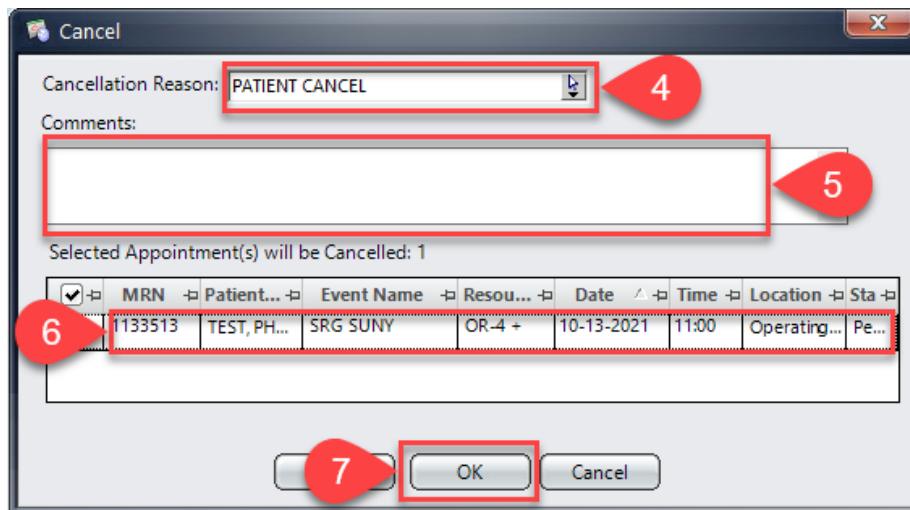
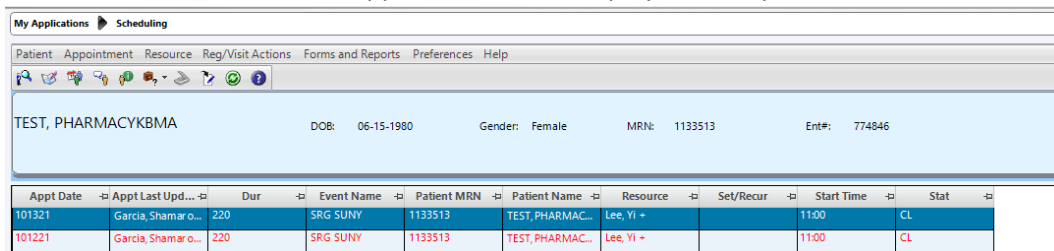8. The appointment will be removed from the **Calendar View**

Lookup Future Appointments

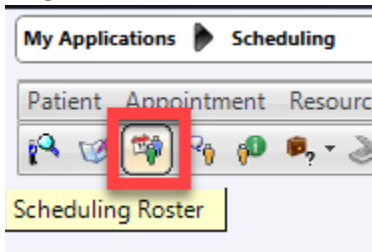1. Click on **Patient** from the top left menu
2. Select **Find Patient**

3. Search for the patient using their **First, Last name** or **MRN #**
4. Click **Search**
5. Select the patient name from the list
6. Click **OK**

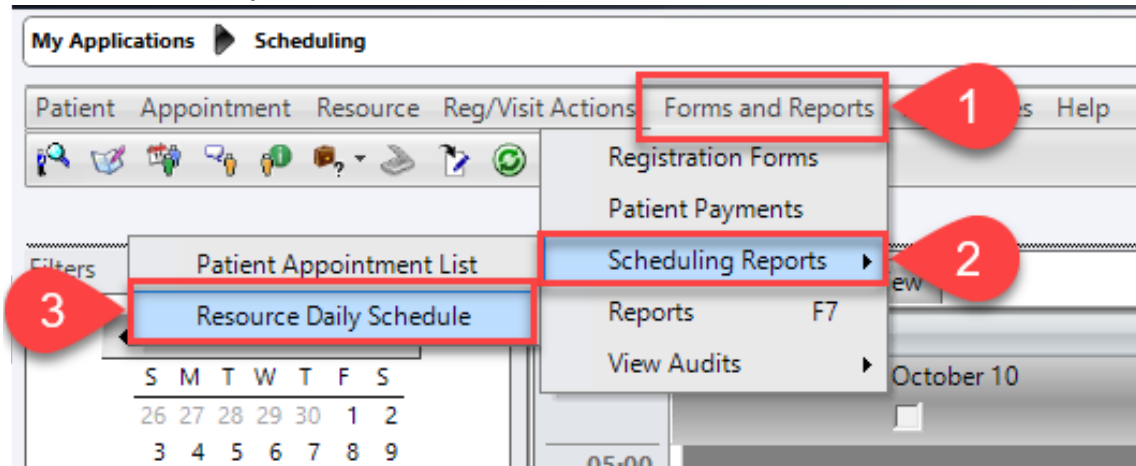7. A list of future and cancelled appointments will display for that patient

8. To go back to the calendar view, click on the **Scheduling Roaster** icon
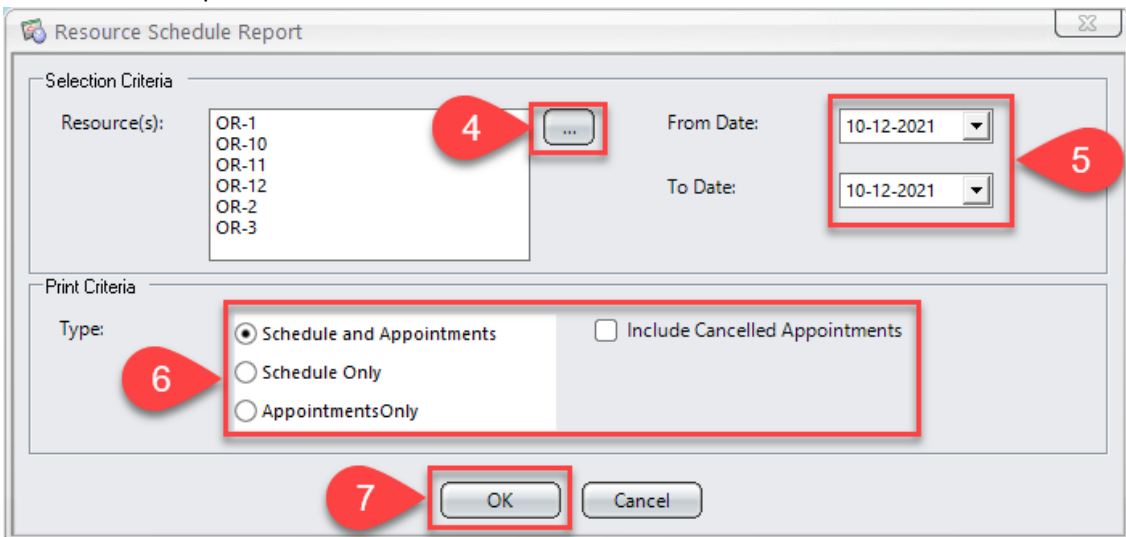
Printing Daily Appointment

1. Click on **Forms and Reports** from the top left menu
2. Select **Scheduling Reports**
3. Select **Resource Daily Schedule**

4. Click the **Ellipsis** button to select the location or provider
5. Select the Date Range
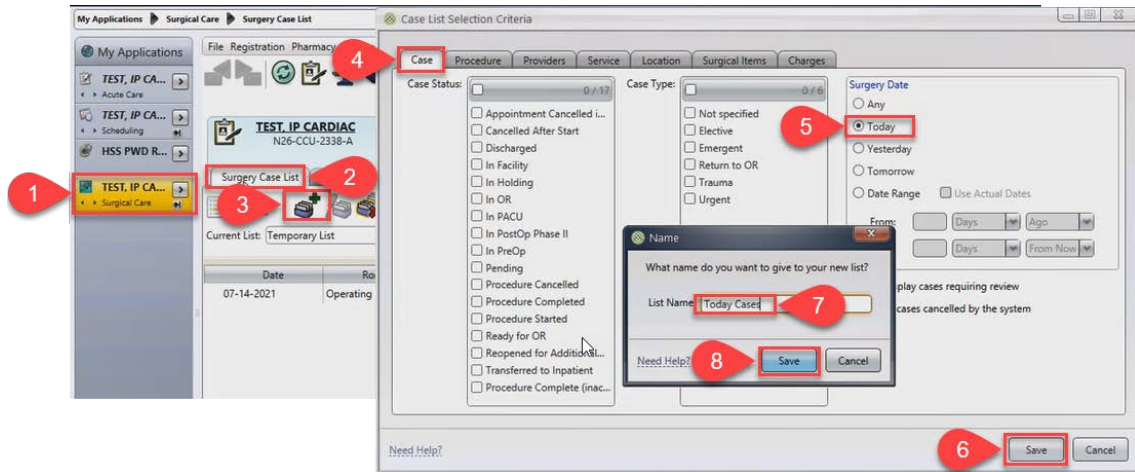6. Select the Criteria Type
7. Then click **OK** to print

Note: a preview of the report will not be displayed before printing
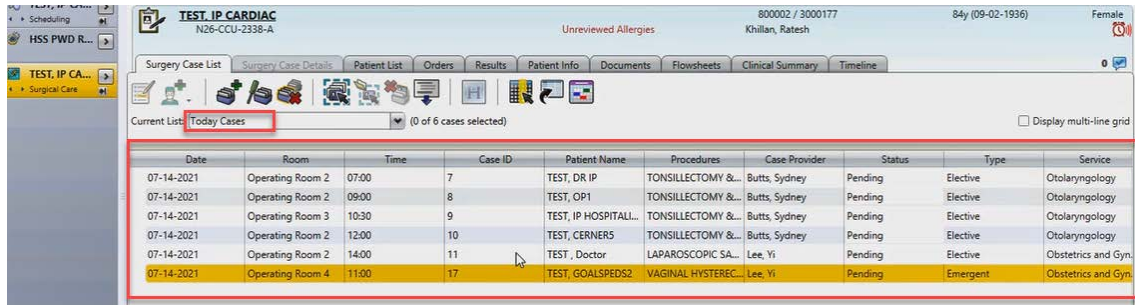
Surgical Care Application

Process for the PreOp Nurse

1. The **PreOp Nurse** will sign into Healthbridge and open the **Surgical Care** application
2. Select the **Surgery Case List** tab
3. Create a surgery List by clicking on the Add list button
4. Click on the **Case** tab
5. Select the Surgery Date "**Today**". The nurse should create separate lists for **Today**, **Yesterday** and **Tomorrow**
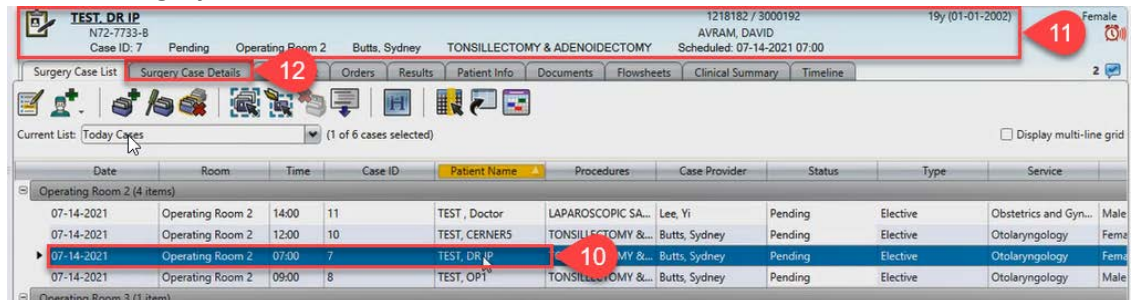6. Click **Save**
7. Name the **List Name** as **Today Cases**
8. Click **Save**

9. The list will now appear with the cases scheduled for today

10. The patient arrives for surgery. Select on the patients name from the **Today Cases** list
11. To confirm that the correct patient is selected, their information will show up in the **Header**
12. Click the **Surgery Case Details** tab

13. Click on **Case Header** tab
14. If the scheduled procedure was delayed, you will be required to select a delayed **Reason**
15. Change the **Status** of this procedure, Click on the **Change Status** button
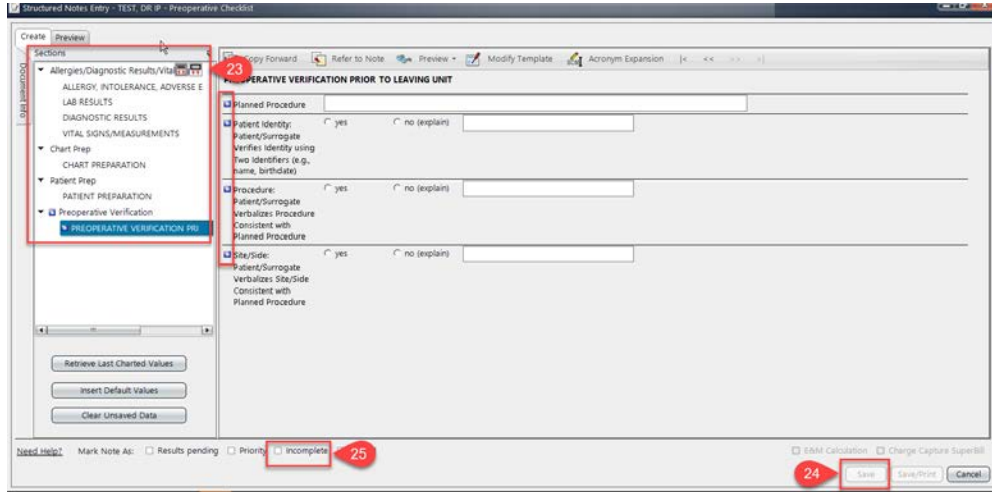16. Select **In PreOp** from the **New Status** drop down menu
17. Click **OK**
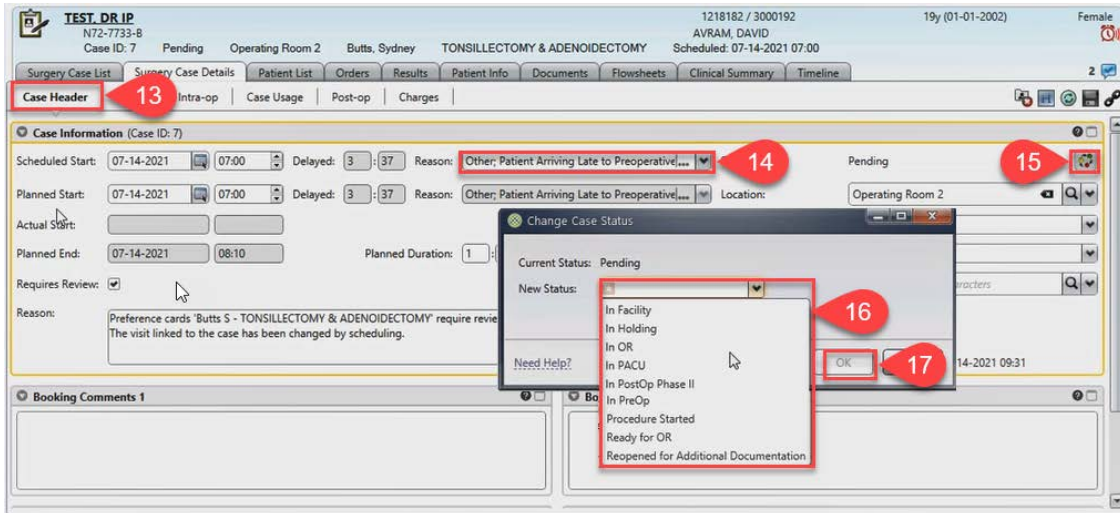
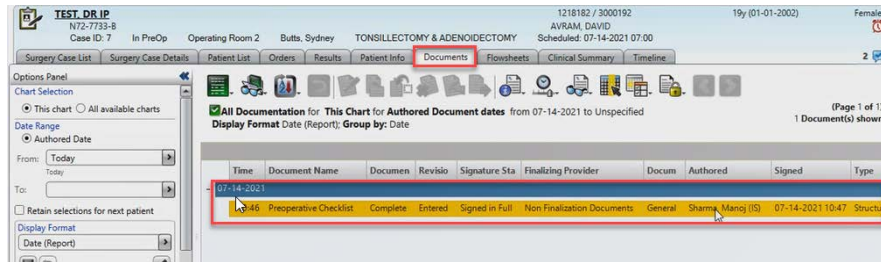18. The status will change from **Pending** to **In PreOp**

19. After reviewing the Case Header and changing the status to In PreOP, you can now click on the Enter Document icon
20. Type "Pre" to get a list of relating documents
21. Select any of the notes that apply (PreOp Checklist, PreOp Instructions, PreOp Assessment)
22. Click Open
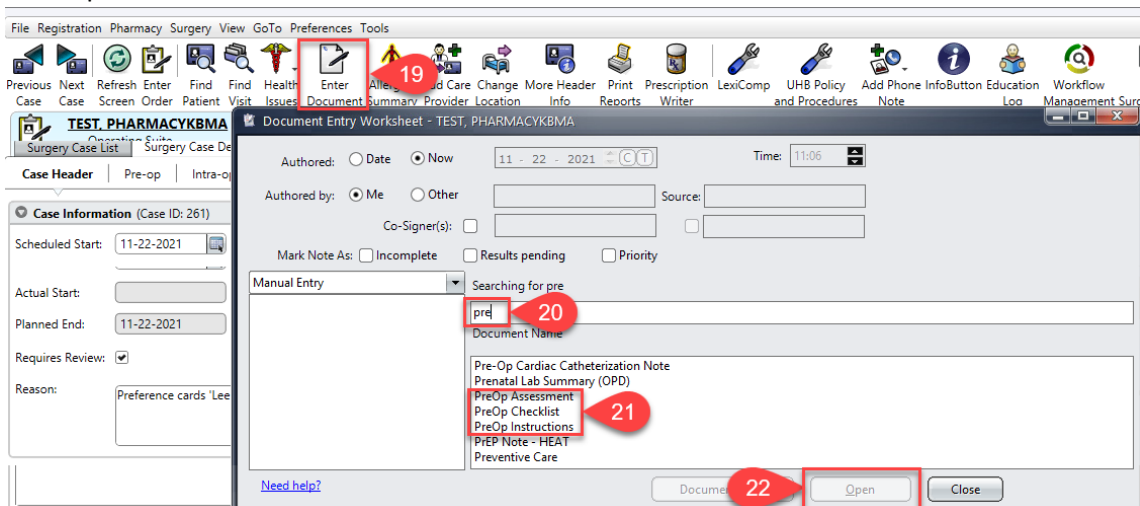
23. Complete all the **Sections** and **mandatory** fields
24. Select **Save** to complete the note
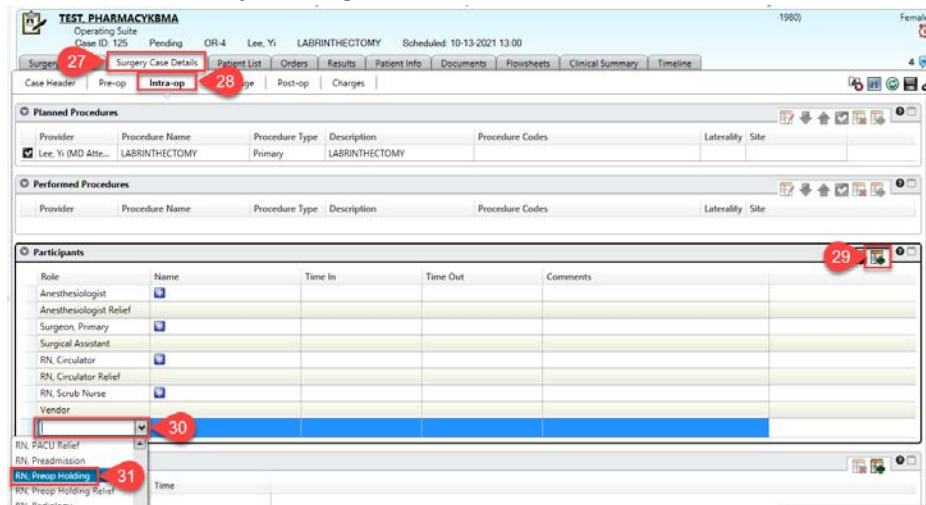25. Select **Incomplete** if you are not able to finish

26. The completed and incomplete document will appear in the **Documents** tab for that patient
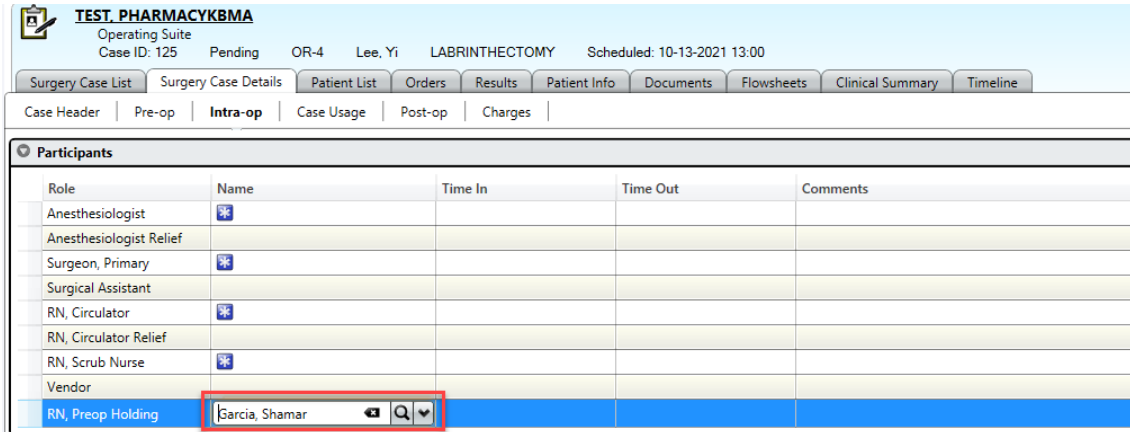

27. Next is to document the **Participants** and **Times** which the patient was in the Pre-op area if you want to charge for the time. Click on the **Surgery Case Details** tab
28. Click on **Intra-op**
29. Click the green plus icon to add the preop nurse
30. Select the dropdown
31. Select the **RN, Preop Holding** from the list
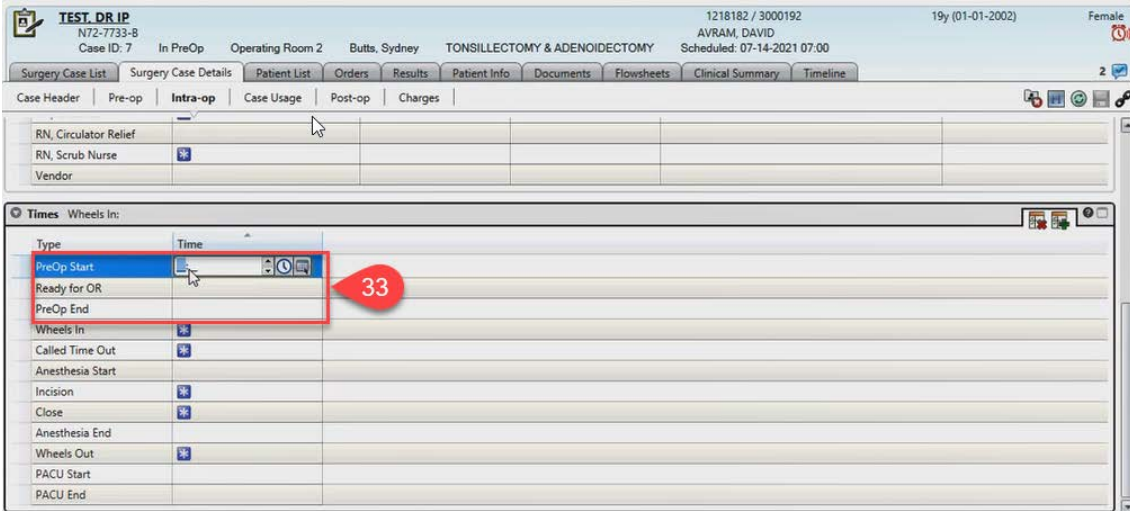
32. Enter the **Name** of the PreOp nurse

33. Document the **PreOp Start, PreOp End,** and **Ready for OR** Time

34. The status is automatically changed to **Ready for OR** when the **Time** is documented in the Ready for OR Type

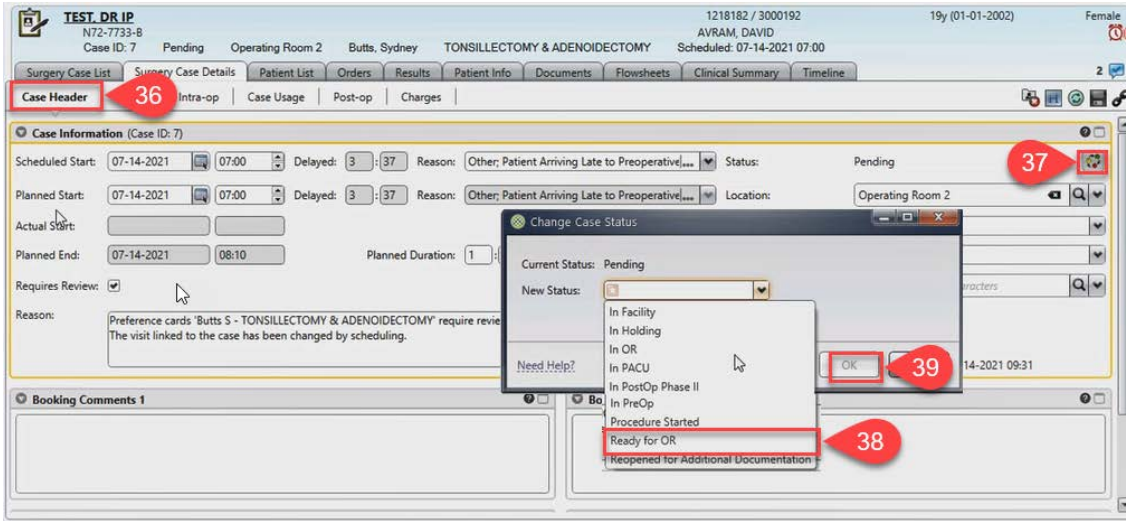35. If the time is not documented in the Ready for OR Type, you will have to manually change the status.
36. Go to **Case Header**
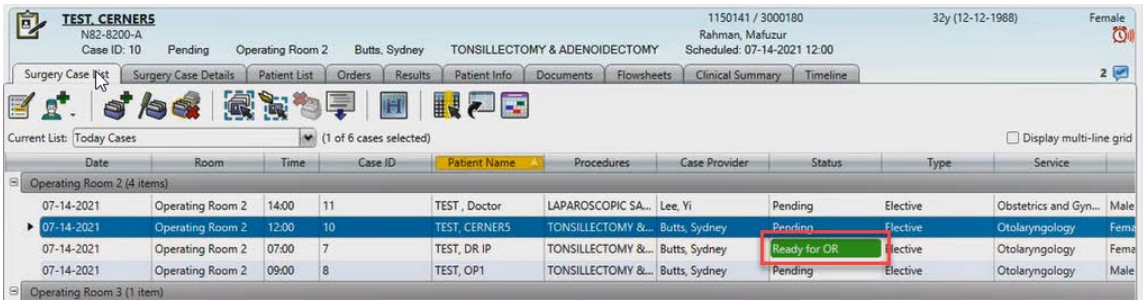37. Click on the **Change Status** icon
38. Select **Ready for OR** from the dropdown menu
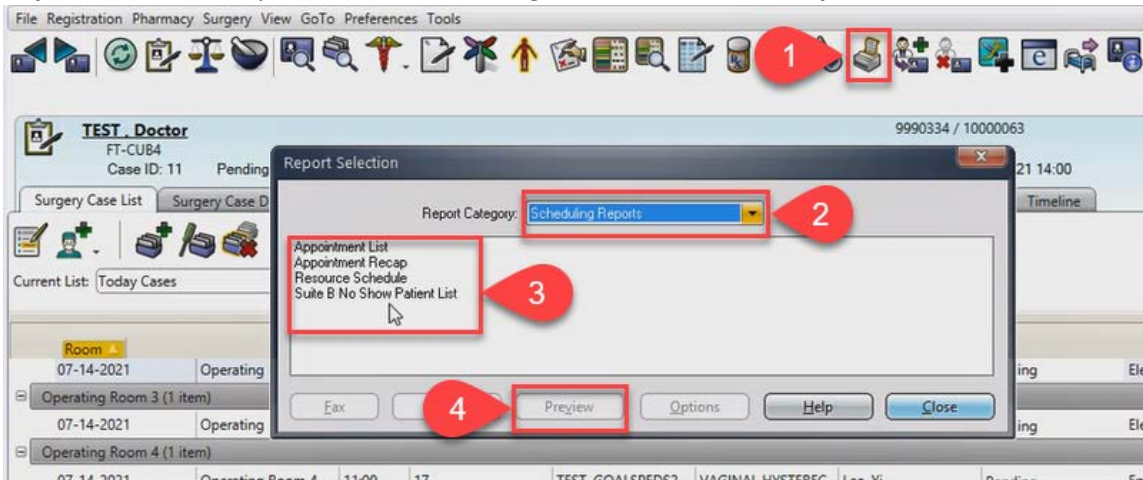39. Then click **OK**

40. Green status indicates the patient is Ready for OR

Note: you can print a schedule Report by clicking the **Print Report** icon, selecting **Scheduling Reports** from the drop down menu, selecting one of the **available report** and click **Preview**.

Surgical Care Application
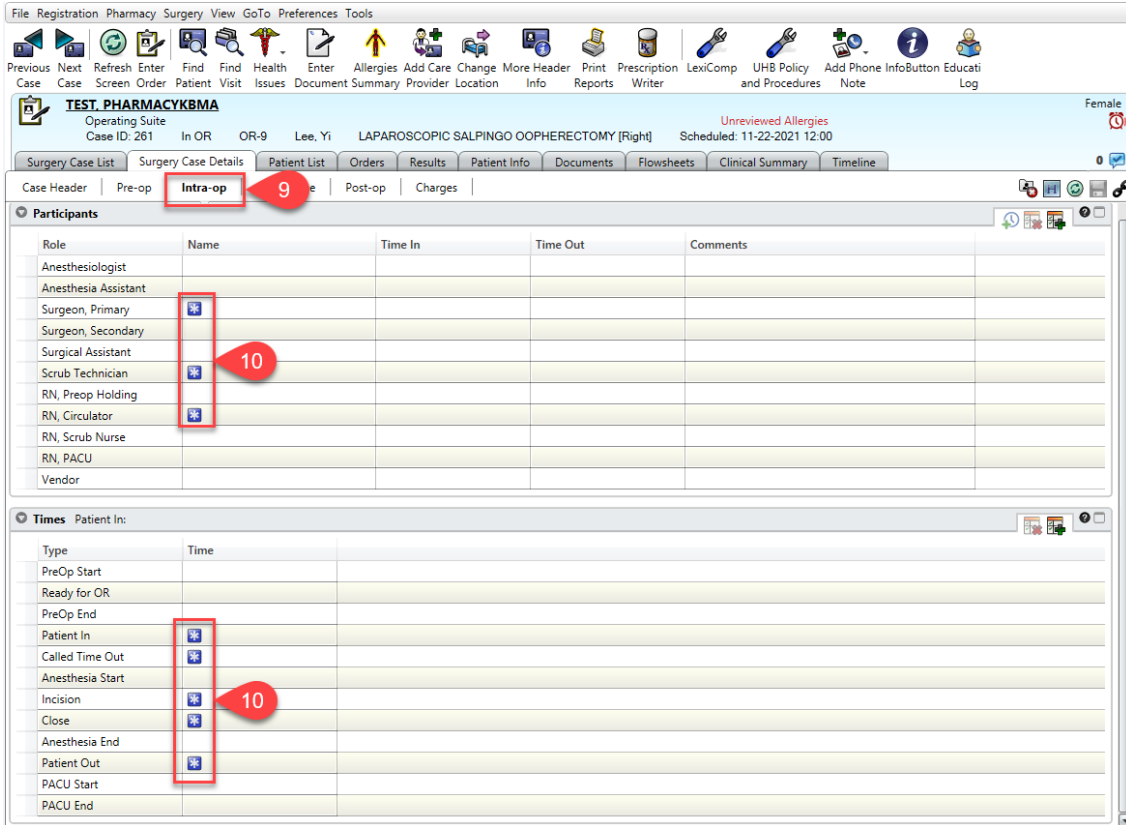
Process for Intra-Op Nurse

1. The Patient is now in the OR, ready for the procedure. The Intra-Op Nurse will log into Healthbridge and open the **Surgical Care** application
2. Open their **Today Cases** list. To create a case list, refer back to page 13, step 1
3. Select the patient with the **Ready for OR** status
4. Then click the **Surgery Case Details** tab
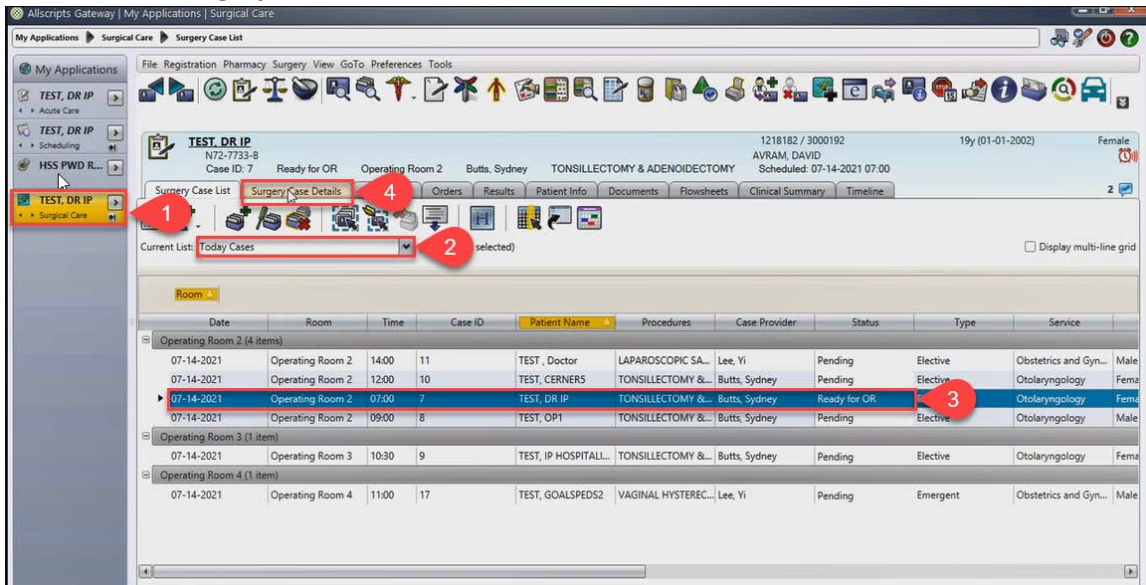
5. Click the **Case Header** tab
6. Click the **Change Status** button
7. Select **In OR** from the drop down menu
8. Then click **OK**
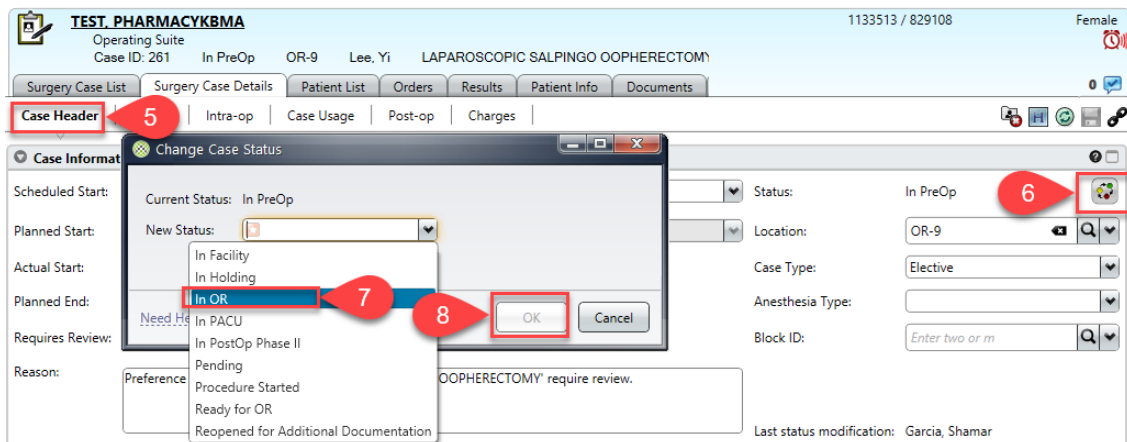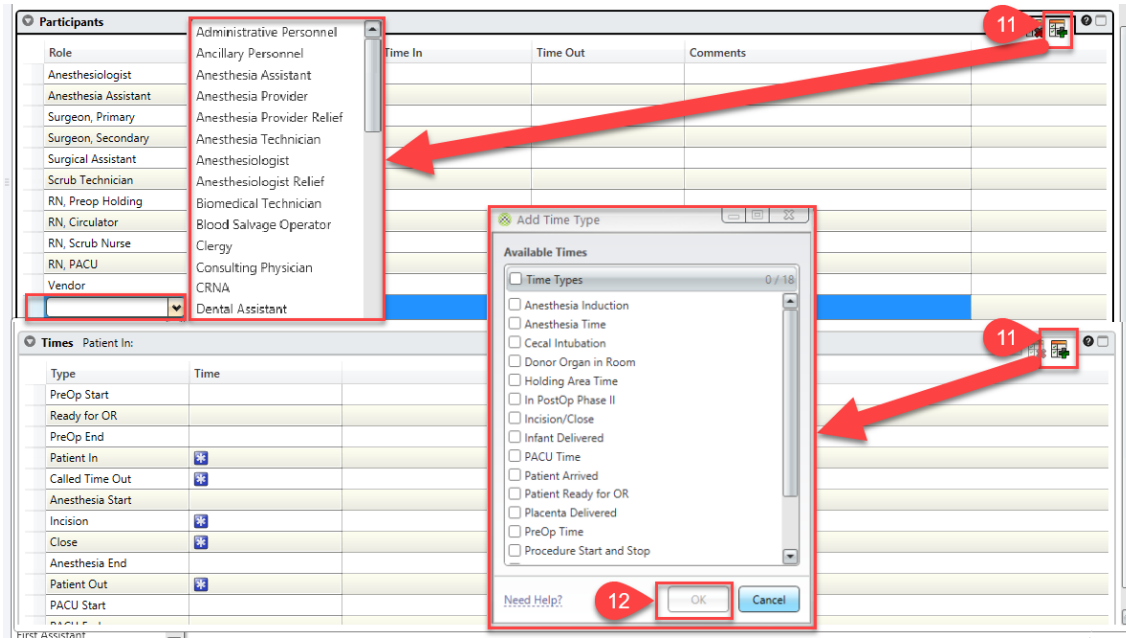
9. Click on the **Intra-op** tab
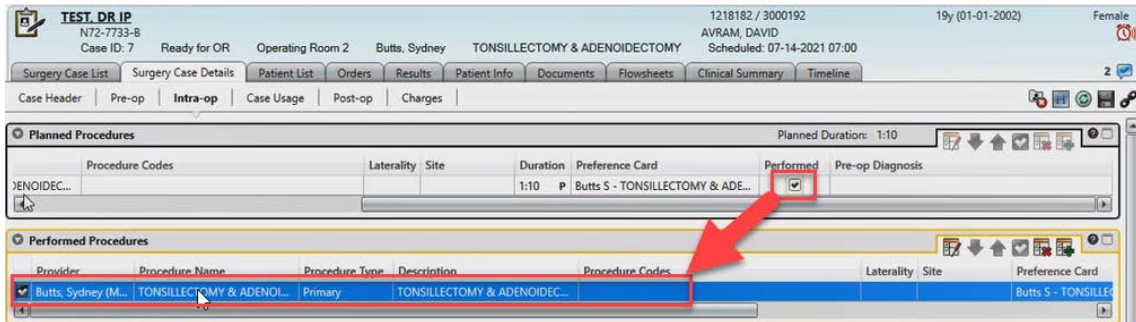10. Fill out all the **Required** fields for **Participants** and **Times**

11. If any other participants or times are needed to be added, click the green Plus button
12. Then select from the **Participants** dropdown menu and select from the **Add Time Type** list and click **OK**

13. When the procedure is complete and the mandatory fields are filled out, you will need to select the box under **Preformed**. The procedure will be moved to the **Preformed Procedure** section

14. Review the usage for this procedure by clicking on the **Case Usage** tab. This is populated by the Preference card.

15. If you need to make changes to the amount used for each item, click on the number to change.

16. After reviewing the case usage, click on **Enter Documents** to complete the **IntraOp Record**
17. Type in "**Intra**" to get a list of relating documents
18. Select **IntraOp Record**
19. Click **Open**
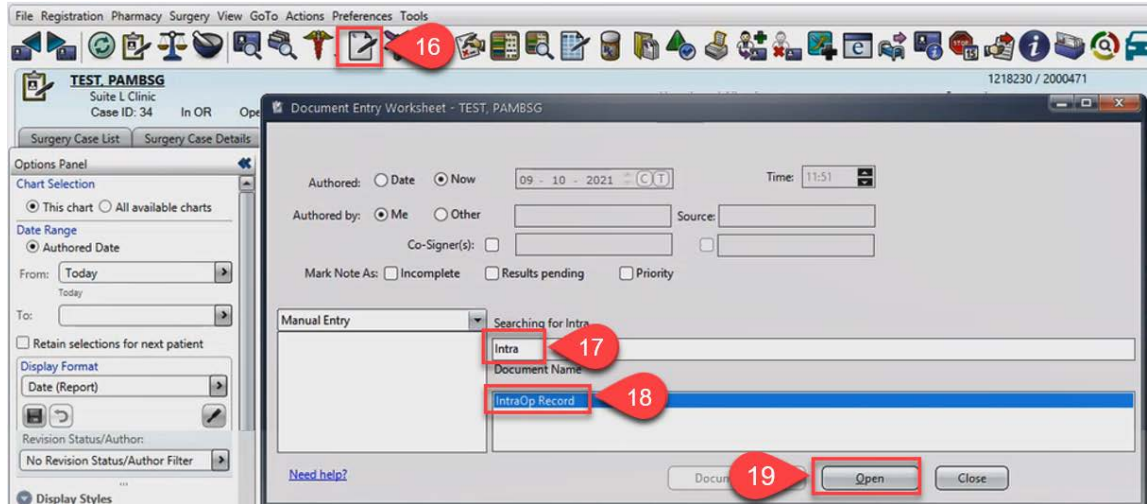
20. Once the Note is completed, it's time to close this case
21. Click on the **Close Case** button
22. Select **Procedure Completed** from the **Closed Status** drop down menu
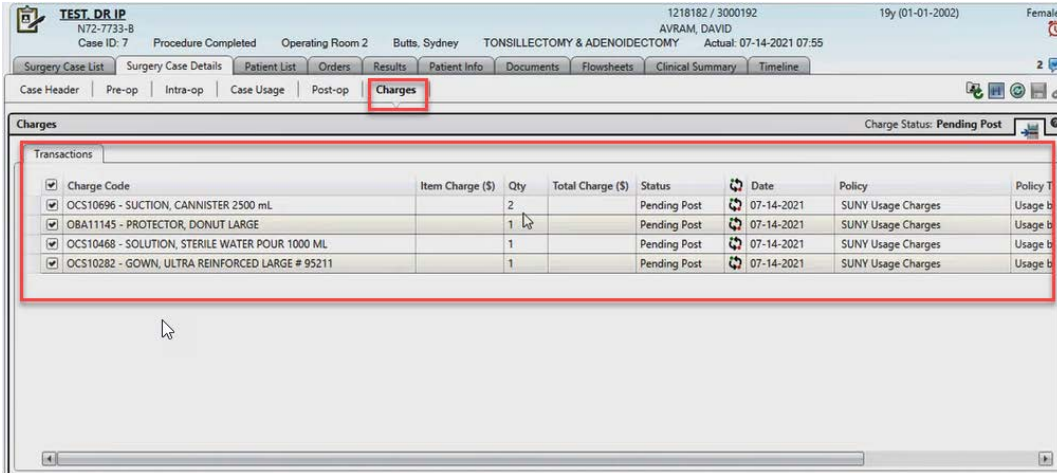23. Click **OK**
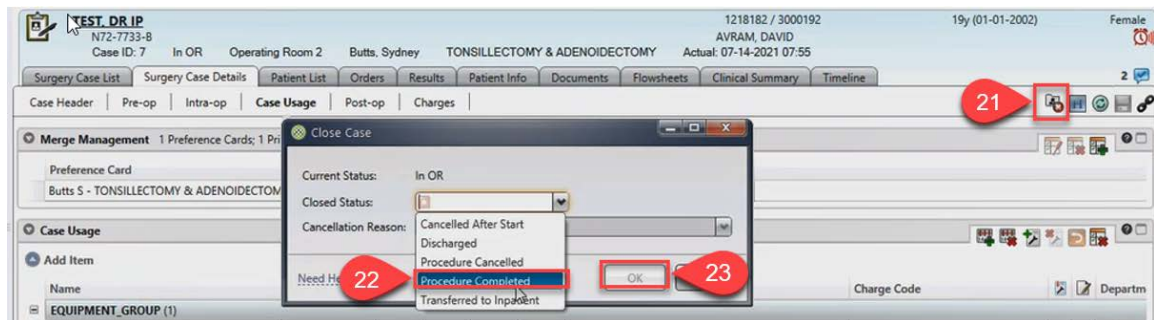
24. If anything was missing or incomplete in your documentation and case details, you will be prompted with the **Case validation Errors.** You will have to go back and complete those sections
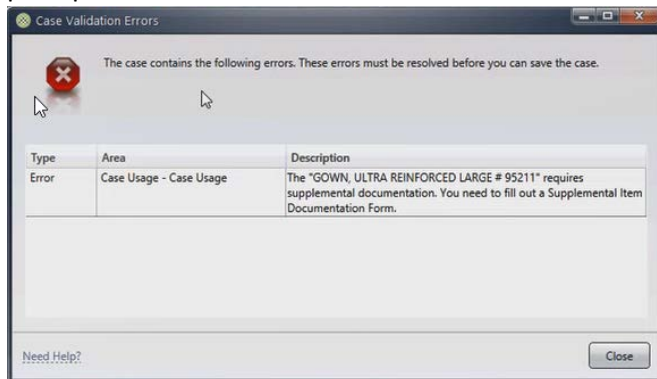
25. Once the case is completed you will see the Status change to **Procedure Completed**

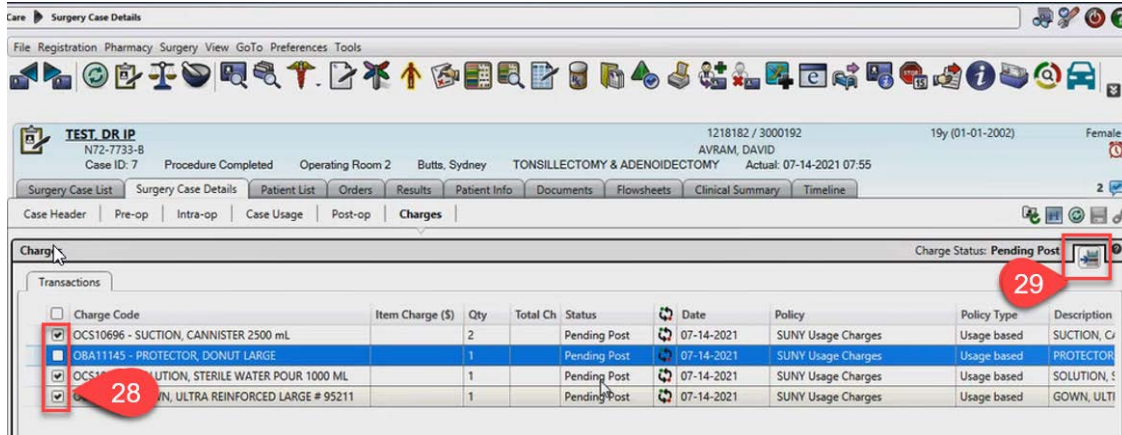26. To see the charges, click on the **Charges** tab

Process for Charge View technician

27. The **Charge View Technician** will review the charges
28. Selecting what they think should be charged for that procedure
29. Then change the charge status from **Pending Post** to **Transmitted,** which will be sent to finance

Surgical Care Application

Process for the **Pacu Nurse**

1. The **Pacu Nurse** will select the completed procedure from the **Surgical Case List** tab
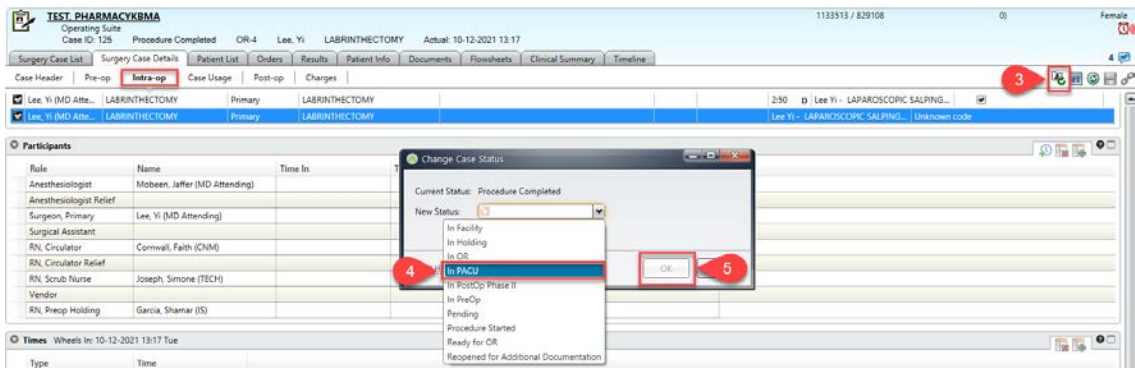

2. Review the details of the completed procedure for the patient in the **Surgical case Details** tab
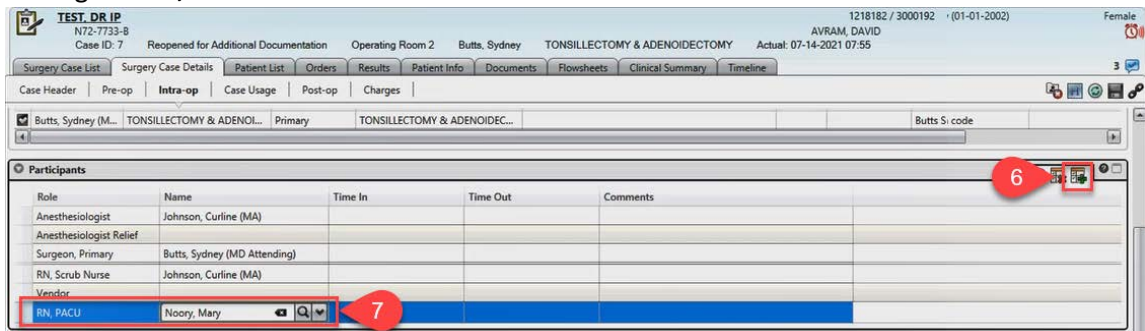
3. The Pacu nurse will reopen the case to document their time by clicking on the reopen button in the **Intra-op** section
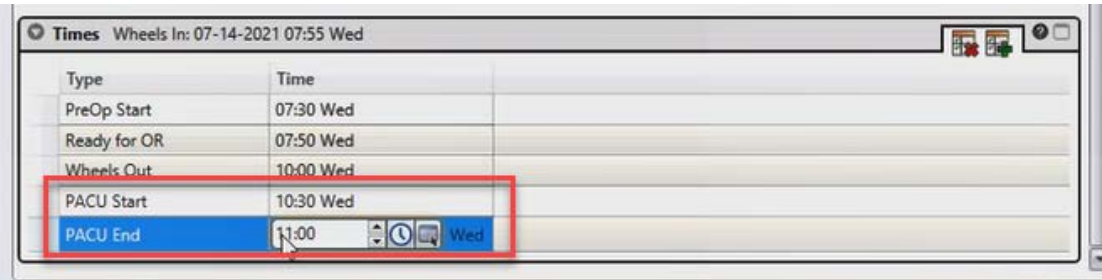4. Selecting **In PACU**
5. Click **OK**

6. The nurse will then add themselves by Clicking the green plus Button
7. Adding the **RN, PACU** Role and their **Name**

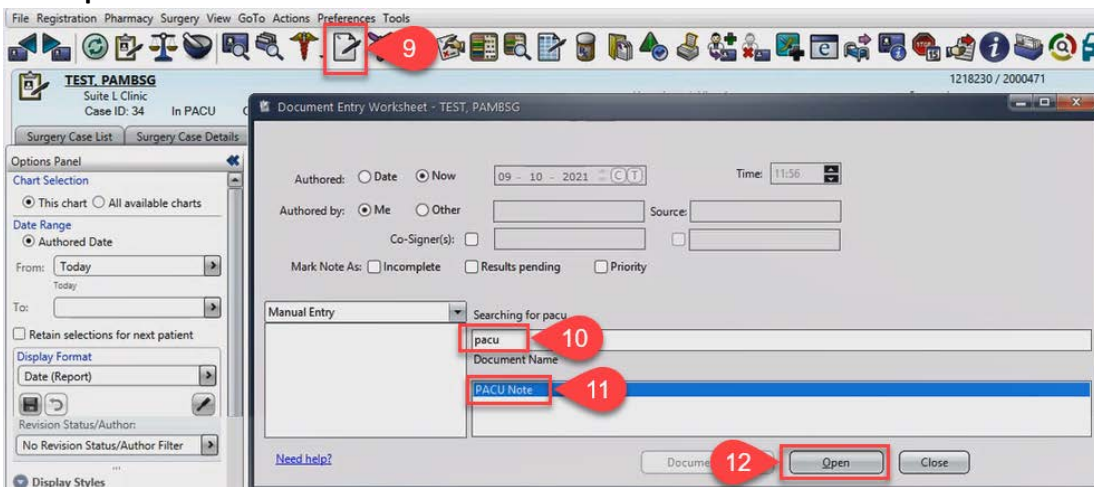8. Enter the **Pacu Start** and **Pacu End** time the patient was in Pacu

9. Click on **Enter Documents** to complete the **Pacu Note**
10. Type in "**Pacu"** to get a list of relating documents
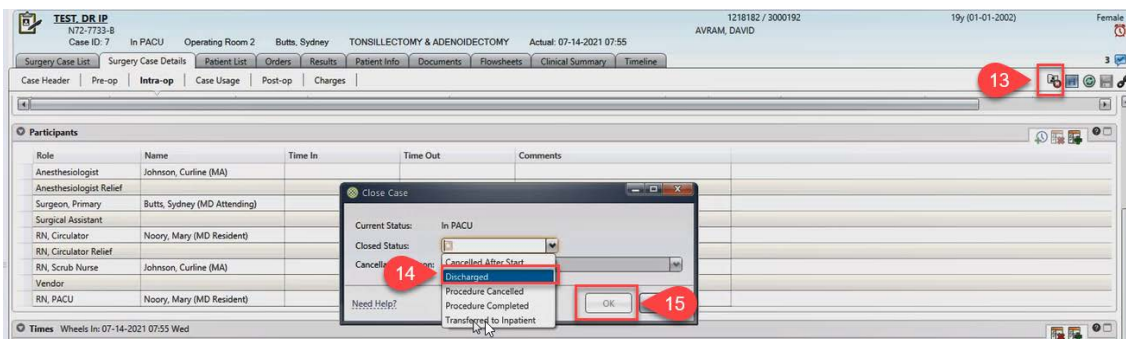11. Select **Pacu Note**
12. Click **Open**

13. After completing the document, the nurse will close the case by clicking the **Close Case** button
14. Selecting **Discharge** as the **Close Status**
15. Click **OK**

16. The patient will show up as **Discharged** on the **Case List**