


Procedural Clinic Staff - Prep for Procedure

This job aid is applicable to employed and affiliate procedural (surgical and endoscopy) clinic staff.

Prep for Procedure - Create a case request

1. Click Prep for Procedure  on the main toolbar.
 - a. If you don't see Prep for Procedure, search for it using the Search field.
2. The 'Search for a Patient' window will appear, enter the patient's name or MRN.
 - a. If the patient does not have a record with Intermountain, call **801-442-8818** to create a new patient record.
3. Once the correct patient has been found, you will see the Patient Encounter Creation window.
4. Enter the provider who will be doing the procedure.
 - a. The encounter Type should default to Prep for Procedure, add it in if necessary.
5. Once the Prep for Procedure navigator opens, navigate to the Orders section.
6. From this point, you could proceed in a few different ways:
 - a. Search for orders manually by typing in the orders search field. All official Intermountain order sets begin with the **IH** prefix and then the service. (ex. IH Surg, IH Ortho, IH GI Endo)
-OR-
 - b. Click the + New button to open up the Order and Order Set Search window.
 - From this window, you can:
 - Click + Follow Users to find a provider and have access to their personal version of order sets.
 - **Note:** The provider must **Favorite** the order or order set for clinic staff to see them with the Follow User functionality
 - Once you are following a provider, you will be able to see all their favorited orders and order sets from the Order and Order Set Search window.
7. Once you have selected the correct order set, you can begin filling out the orders according to the instructions given by the provider.
8. Select the checkbox for the **Case Request** order.
 - a. Required fields include:
 - Location, Patient Class, Provider, Procedure, and Anesthesia type.

9. **Note:** When adding the Procedure, **search by entering the name of the procedure rather than the CPT code.**
- A single CPT code may be associated with multiple procedures, and selecting the wrong one can lead to:
 - Incorrect procedure scheduling
 - Inaccurate resource information tied to the preference card
 - To ensure accuracy, always verify the procedure name before finalizing the selection.

Endoscopy Only:

- Location is the facility acronym followed by either 'Endoscopy Procedural', 'Endoscopy OR', or just 'OR' (if the facility does their endoscopy procedures in the OR)
- Critical:** If you need to add multiple endoscopy procedures, (e.g. EGD and Colonoscopy), each procedure **must** be its own Panel. Any additional Panels **must** be marked as "After Previous Panel". This ensures that Provation works appropriately.
 - This is unique to Endoscopy.* Surgical cases only have additional Panels if multiple procedures are performed by different surgeons or different Service lines

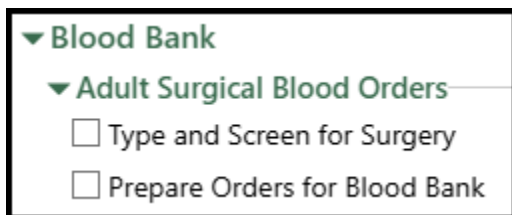
10. Fill out the recommended fields as appropriate.

- If you don't know what day the procedure will take place, you can leave that field blank but it is *strongly recommended* that you have a date chosen when filling out the Case Request order.
 - Note:** If you do not know the date the procedure will take place, use OR Marketplace to coordinate with Intermountain Case Schedulers when you do know the date for the procedure.
- Remember to fill out any Special Needs (ex. Equipment not included in the Preference Card, patient needs a Pre-Surgical Block, etc.). For Special Billing Needs information, see the Cosmetic Procedure section at the end of this document.
- In the Comments free text box (beneath Special Needs), place information regarding any scheduling or other miscellaneous information. Comments placed here will be seen by the Intermountain Case Scheduler

11. Proceed down the list of other orders, updating and modifying as instructed by the provider.

- If using a provider's personalized version of an order set, you should not need to make many (or any) changes to pre-selected orders.

- b. If the procedure you are scheduling requires blood to be prepared ahead of time, be sure to select the applicable orders:



From this point, you can proceed in one of two ways:

1. **Sign**
2. **Save Work > Pend and Send**



- If the provider does not want to review or edit the Case Request, click **Sign**
 - The Case Request will be sent to Intermountain Case Schedulers immediately and can be scheduled.
 - The provider will still be able to review and edit the other pre-op orders and then Second Sign them.
- If the provider wants to review and possibly edit the Case Request, click **Save Work > Pend and Send**
 - This option delays the Case Request being sent to the Intermountain Case Schedulers until the provider signs off on it.

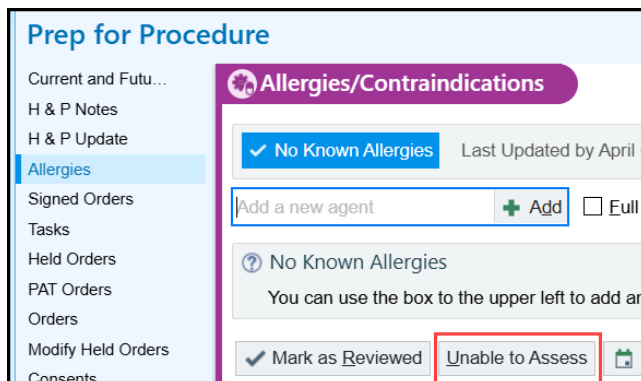
Sign

- Clicking Sign routes the Case Request to the Case Scheduler. All other clinical Preop orders will be sent to the provider where they can review and edit, then Second Sign.
- Next, associate a diagnosis with the orders you just placed.
- When clicking **Sign**, enter an order mode of **Cosign IS Required**.
- Enter the Ordering provider and Second Signer.
- MAs, PSRs, and clinic schedulers have logic applied to their role so that all clinical orders will have Second Sign applied to them
 - **Second Sign**: A stricter version of Cosign. Orders with Second Sign applied to them cannot be acted on by anyone or even seen by most until the orders have been signed off by the Second Signer.

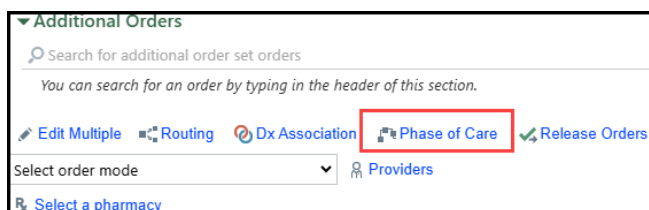
- At this point, the case request order has now been sent and will appear for Intermountain Case Schedulers.

Common Issues that can prevent you from signing:


- Allergies not reviewed
 - If you get a popup saying that allergies need to be reviewed, click the Allergies section. If the patient is not present at that time, click Unable to Assess and give a reason why. Then try signing again.

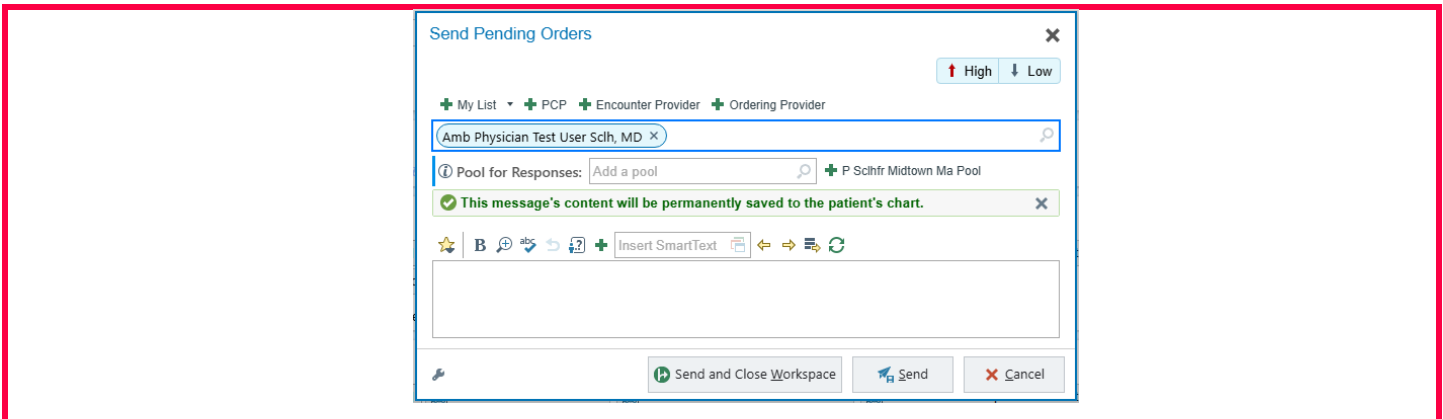


- Phases of Care
 - If you get a popup saying the phase of care is incorrect, click Phase of Care and ensure all appropriate orders are listed as Sign and Hold.



Save Work > Pend and Send

- Clicking Save Work and then Pend and Send will send all orders, including the case request, to the provider to sign. This means the Case Scheduler will **not** be able to schedule the procedure until the provider signs the order. This workflow does risk causing a delay in scheduling.
- Important:** Before clicking Save Work, be sure click  to associate a diagnosis with the orders you are pending and sending
- Click Save Work and then click Pend and Send
- Next, a window will appear, enter the provider's name and click Send or Send and Close Workspace.

**Remember:**

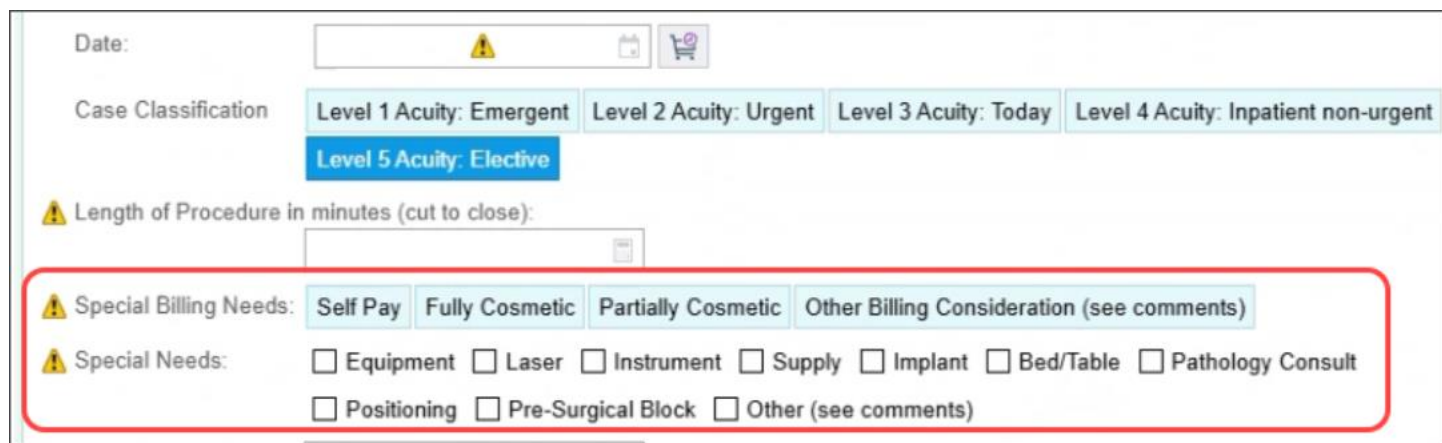
- The Intermountain Case Schedulers will be able to see the Case Request in the depot **only once the orders have been signed.**
 - If you chose Pend and Send, this will be after the Provider signs the orders
- It is strongly recommended that a date for the procedure be entered in the Case Request so that the Intermountain Case Scheduler can act on the case request and schedule the procedure.
- If a date was not entered on the Case Request, once that date has been determined with the provider and/or patient, you will need to use OR Marketplace to request the procedure occur on the chosen date.

- See the following page for Special Billing Needs for Cosmetic Procedures

Special Billing Needs for Cosmetic Procedures

You must select **Fully Cosmetic** or **Partially Cosmetic**, so the case routes to the appropriate work queue for estimate creation, then select **Other Billing Considerations (see comments)**.

Note: Always select **Fully cosmetic** or **Partially cosmetic** for cosmetic procedures. Not selecting one of these options may result in billing errors that impact the patient.



Date:

Case Classification: **Level 1 Acuity: Emergent** | Level 2 Acuity: Urgent | Level 3 Acuity: Today | Level 4 Acuity: Inpatient non-urgent | **Level 5 Acuity: Elective**

⚠ Length of Procedure in minutes (cut to close):

⚠ Special Billing Needs: **Self Pay** | **Fully Cosmetic** | Partially Cosmetic | Other Billing Consideration (see comments)

⚠ Special Needs: Equipment Laser Instrument Supply Implant Bed/Table Pathology Consult
 Positioning Pre-Surgical Block Other (see comments)

Affiliate Physicians and APPS must use the SmartPhrase **COSCASECOMMENT [1151165]** in the comments field to quickly document critical details needed for accurate billing and estimates, including provider fees, anesthesia fees, and—for partially cosmetic cases—the applicable minutes or CPT codes for the cosmetic portion. Specifying time or CPT codes to ensure charges are billed correctly.



⚠ Device Company: Abbott | Biotronik | Boston Scientific/Guidant | Medtronic | St. Jude Medical | N/A

⚠ 3D Mapping Company: Abbott | Biospace Webster | Boston Scientific | N/A

Comments:

SmartPhrase – COSCASECOMMENT [1151165]

Estimated Surgeon Professional Fees: \$
 Other known provider fees (e.g., anesthesia): ***
 Cosmetic CPTs: ***
 Insurance CPTs (if partially cosmetic procedure): ***
 Estimated Cosmetic OR Time: ***
 Additional equipment, services or extended recovery time that may impact the final patient responsibility: ***

The Comments field may also be used to communicate important information to schedulers and OR staff. Be aware that self-pay selections route cases to a different work queue, while facility fees are typically pulled from the fee schedule.