

MA/Office Staff: Proposing Surgical Procedure Orders and PowerPlans (Order Sets)

1. **Request a FIN** (Financial Identification Number = encounter number) for your patient via phone call to Intermountain Registration at **(833) 387-8710**
2. **Open the patient's chart using the new FIN.**
3. Go to the Patient Summary section under the Summary tab. In the Procedure/Surgery Request component, **click on "Shared", then search and select your provider's name.**
4. Click to **open the "Common Procedure List" folder** for the surgical location you need (for example, MK Main OR for McKay-Dee's main OR). **Select the desired procedure order.**
 - a. In the Ordering Provider window that pops up, select "Order" if you want your procedure order to send directly to the OR scheduler when you are done. Your provider will still need to cosign the procedure order, but the order doesn't have to have that signature for the OR scheduler to see it.
 - b. Select "Proposal" if you want the procedure order to go as a proposal to your provider's Message Center Inbox for signature prior to being sent to the OR scheduler.
5. **Close the Common Procedure List folder by clicking on the word "Favorites..."** under your provider's name.
6. Click to **open the My Plan Favorites folder** and **select the appropriate surgical PowerPlan order** (aka pre-op order set).
 - a. For patients having same day surgery, please select a PowerPlan with the words "phased" and "same-day" or "SDS" in the title.
 - b. For patients who will be admitted or will have a 23-hour stay, please select a PowerPlan with the words "hospital" and "periop" in the title.
 - c. BTW, PowerPlans can only be sent as Proposals to your provider. They cannot be sent as "Order".
7. **Click on the little green Orders for Signature box** (aka the shopping cart). Confirm orders you selected are there and **click Sign or Modify**. Enter **your provider's name as the ordering provider** and **click OK**.
8. In the next window, you can see all the sub-sections and orders contained in the PowerPlan. It is best practice to leave the PowerPlan exactly as your provider saved it and not add or delete any orders. **Click the Orders for Signature button** in the lower right corner of the screen.
9. The procedure order will now be viewable in the main part of your screen. **Click on the procedure order**, the blue circle with the white X or the button at the bottom that says "X remaining required details". This will open the order detail form.
10. **Complete the procedure order form**, including adding a diagnosis under the Diagnoses tab.
11. **Click Sign** in the lower right corner of the screen.

To check on the orders you just sent or proposed, choose the Orders section in the dark grey Menu on the left side of your screen. You should see the PowerPlan listed in the View pane and the procedure order listed in the main part of the screen.

Once the OR scheduler puts the case on the OR schedule, you will be able to see it on your provider's OR schedule, viewable in the Ambulatory Organizer (you can find this in the tool bar at the top of your screen or in the drop down menu under VIEW at the top of your screen). Add your provider as a resource in the organizer to see his or her OR schedule.