

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

This document walks you through:

1. Requesting a FIN (Financial Identification Number = encounter number) for your patient via phone call to Intermountain Registration.
2. Opening the patient’s chart using the pre-reg or pre-admit FIN for this procedure.
3. Submitting a procedure or surgery order AND proposing phased orders (PowerPlans) if you have been instructed to do this by your physician.
4. Viewing a provider’s OR schedule using the Ambulatory Organizer.

### Requesting a Surgical Encounter FIN#

1. Office calls Intermountain Registration and requests a pre-registration FIN for their surgery patient.

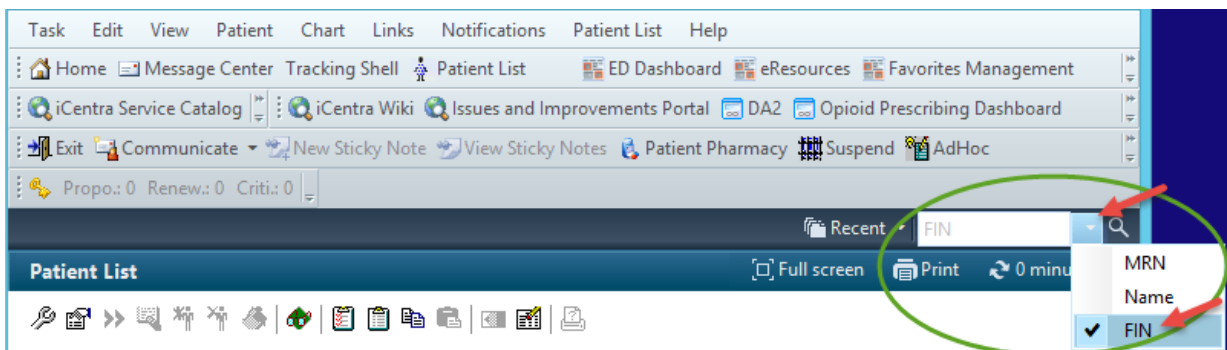
➔ **Intermountain Registration FIN Request Line: 801-906-7440**

**Note:** Registration will need the following information: Patient’s name, date-of-birth, phone number, location for the procedure (for example: Utah Valley Main OR or MKD endoscopy), procedure, diagnosis or reason for procedure, insurance carrier and ID number.

2. Intermountain Registration does a quick registration and will give the FIN#.
3. MA/Office staff relays the FIN# to the provider so orders can be placed **OR** the MA/Office staff uses the FIN# to propose orders.

### Opening the Patient Chart

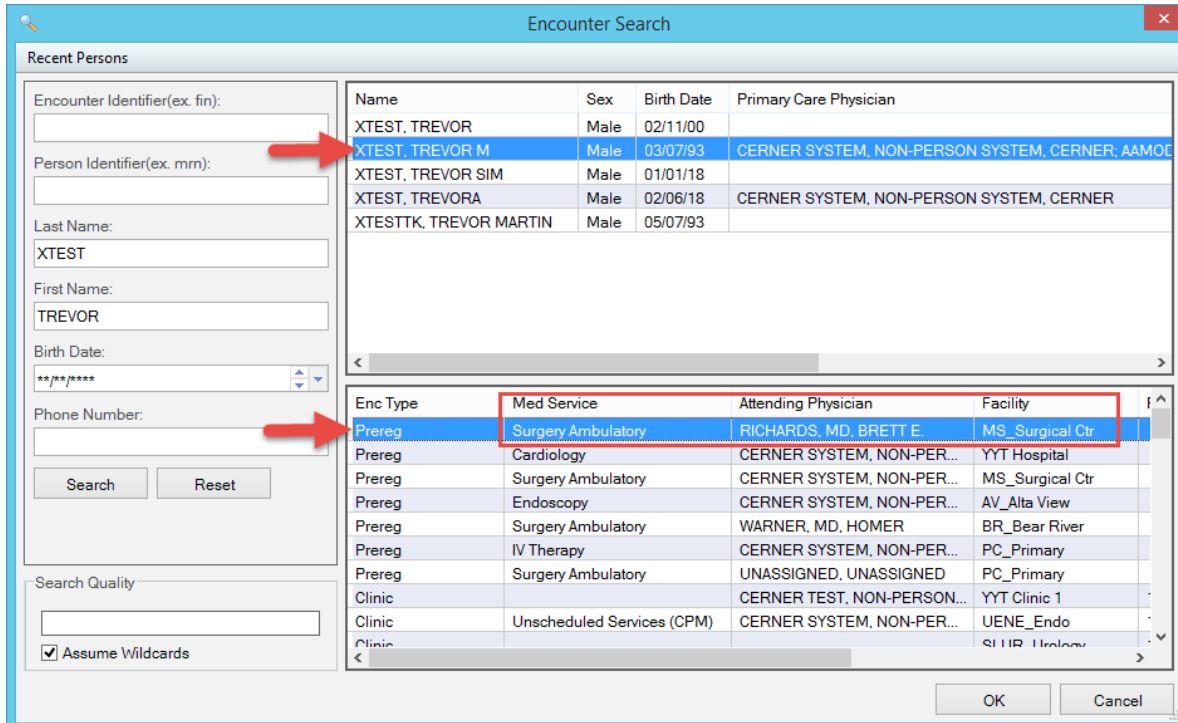
1. Open iCentra CernerWorks then open PowerChart.
2. From the home screen, in the upper right corner, click on the search field, noting whether the search parameter is set to **MRN**, **Name**, or **FIN**.
3. Modify the search parameter, if needed, by clicking on the small dropdown to the right of the search field; place the checkmark next to the FIN search type. Enter the **FIN#** that was created for you in the step above and hit **Enter**. The patient’s chart will open.



- If you are missing the FIN or the number you have is incorrect, you can use the Name search. Type the patient's **Lastname, Firstname** into the field and press **ENTER**.

The *Patient Search* window will open. From this window, verify that you have the correct patient highlighted in the top portion of the screen, and then click to highlight the recently created **Pre-Reg or Pre-Admit FIN** in the bottom of the window. Remember to look for the appropriate location and service (e.g. surgery).

- With the correct FIN selected for the correct patient, click **OK** and the patient's chart will open.



- If you are scheduling a pediatric patient who does not have a current weight or allergies documented in iCentra you may see the Missing Weight/Allergies message.

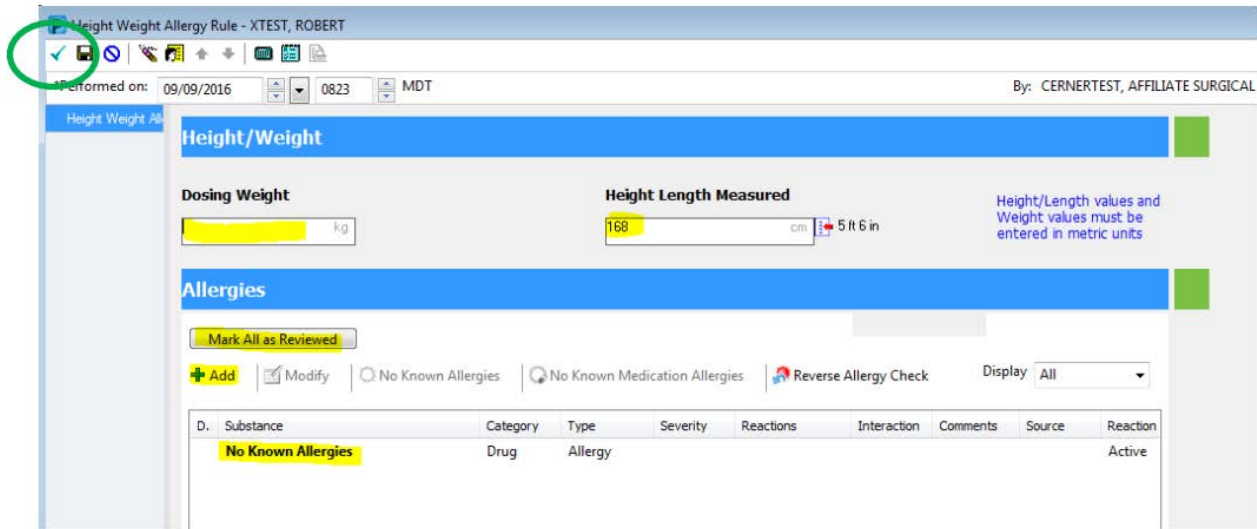
*If you do not see this message, proceed to the next section [Entering a Procedure/Surgery Order and a PowerPlan \(Order Set\)](#).*

- Click the **Document** button to document the necessary height, weight, and/or allergies.



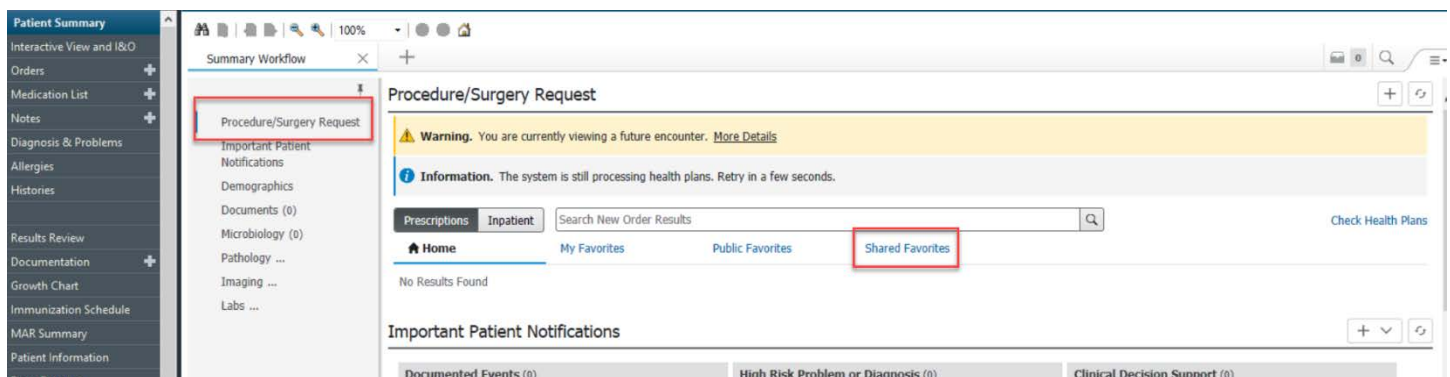
- Document the patient's height, weight, and allergies in the *Height Weight Allergy Rule* window.

- Once the weight and/or allergies have been documented, click **Sign** (the green check mark that appears in the upper left corner of the window) to save your changes.

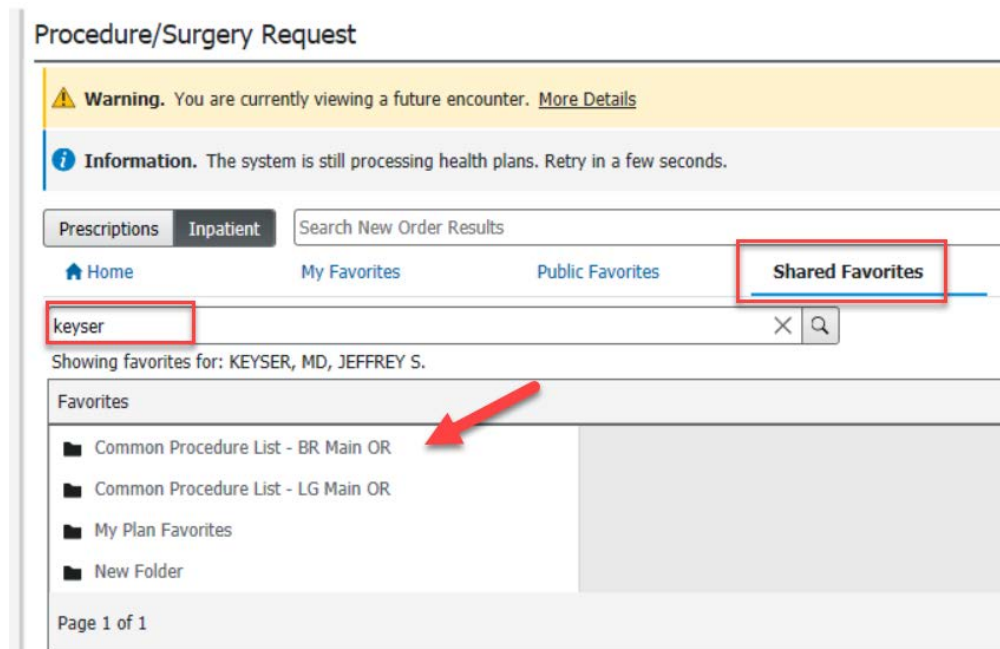


## Entering a Procedure/Surgery Order and a PowerPlan (Order Set)

- Click the **Patient Summary** on the left-hand dark grey Table of Contents, if it is not already displayed.
- Go to the Summary tab, then navigate to the **Procedure/Surgery Request** component.
- In the Procedure/Surgery Request component, click the **Shared** tab.



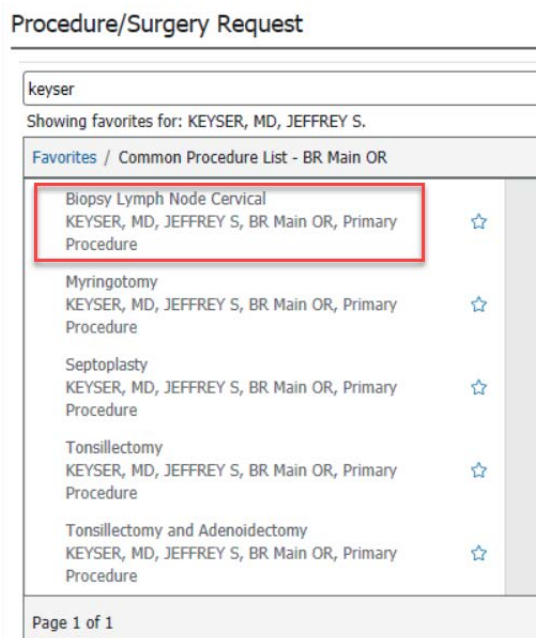
- Below **Shared** is a search field showing **Provider Last name, First name**. Type in the name of the surgeon who is requesting the surgery and click on the provider's name from the list of matches (in blue).
- You should see at least one "Common Procedure List" folder and one "My Plan Favorites" folder. Select the "Common Procedure List" folder which correlates with the location where the surgery will be done.



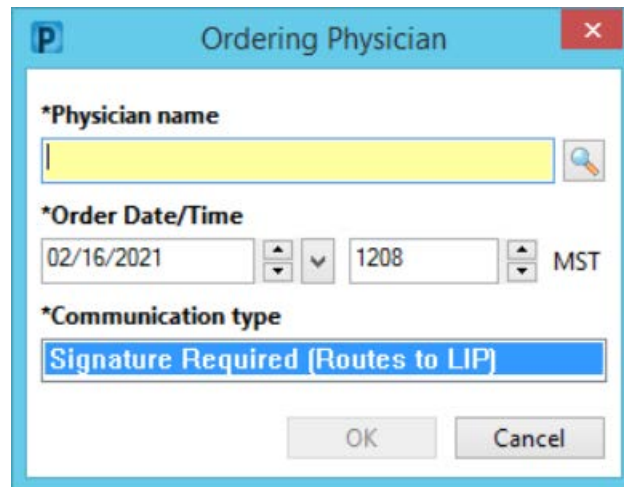
**Please Note:**

***This favorite folder must be set up in advance of scheduling patients for surgery. The folder shows a list of the surgical procedures which are linked to unique Doctor Preference Cards (DPCs) maintained by OR staff at each facility. DPCs are created by the surgeon working together with the Surgical Services team at each OR location where the surgeon operates.***

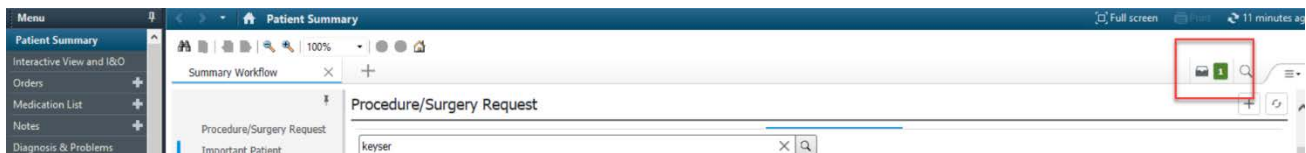
- The “Common Procedure List” folder will open to show you a list of procedures which have DPCs. Find the procedure that you need to order and click on the Procedure name.



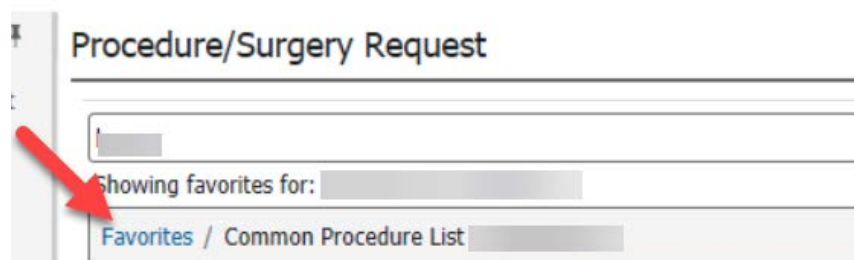
- An initial **Ordering Physician** window will appear.



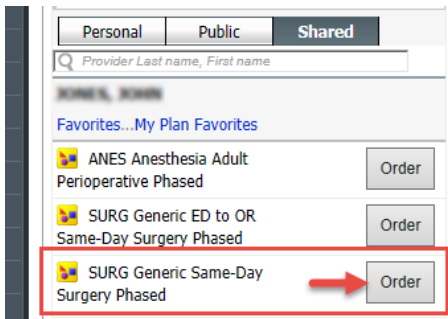
- Enter the ordering provider's name.
  - Click **OK**.
- The **Orders for Signature** box will turn green and show the count of orders you are proposing for the provider. You can add as many unique procedures as required for your patient's surgery. (*Rule of thumb: one order per surgical approach.*)



- Next, close the Common Procedure List folder by clicking on the blue word "**Favorites...**" found just below the provider's name. This will return you to a view of the Favorites Folders.

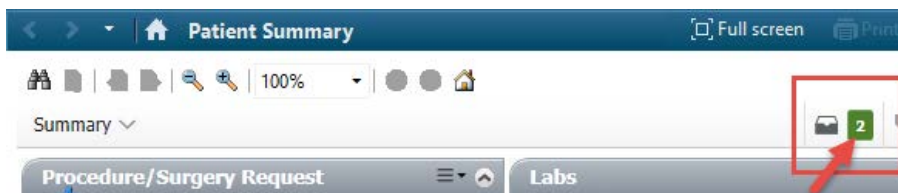


- Select the folder **My Plan Favorites** and choose a PowerPlan (order set) by **clicking on the name of the PowerPlan** being requested.

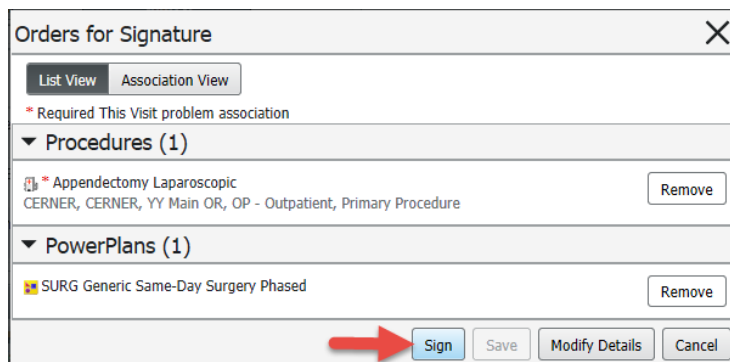


**Note:** This favorite folder is set up in advance by the provider when he/she saves favorite PowerPlans.

- The green **Orders for Signature** box should now show “2” as the count of orders you are proposing for the provider. Click the green box.



- In the box that appears, click **Sign** or **Modify Details** to fill out the details.



- The Ordering Physician window appears. On the *Ordering Physician* window:
  - Proposal** is the default selection. (The selection of **Order** is not available for PowerPlans.)
  - Enter the ordering provider’s name.

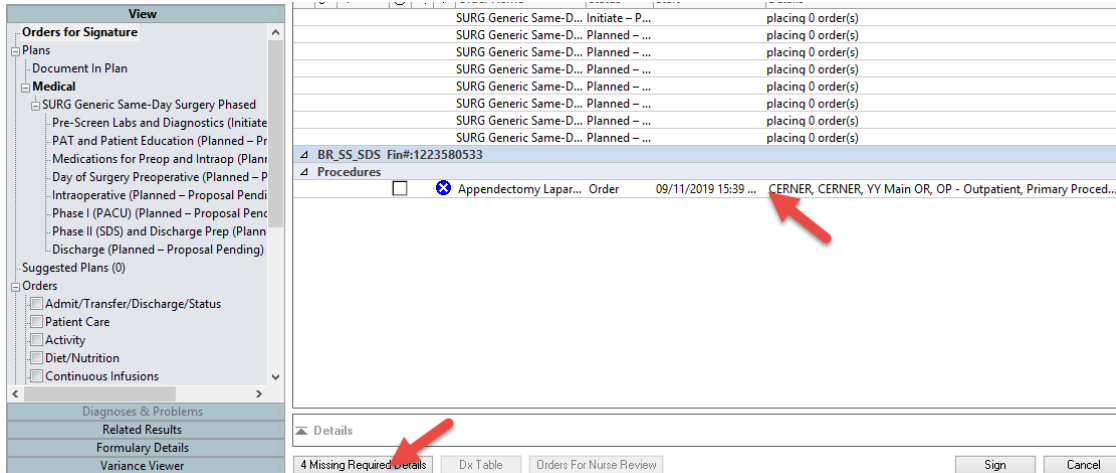
c. Click **OK**.

14. On the next *PowerPlan Routing for Signature* window, confirm that the ordering physician is listed and click **OK**.

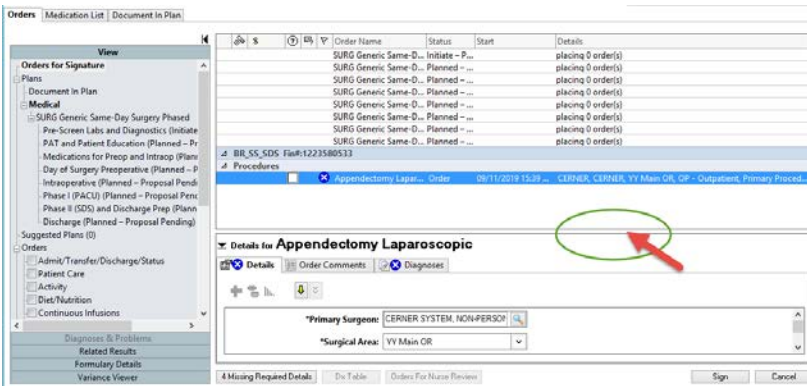
15. On the Orders screen, note that the PowerPlan is showing on the **View** pane, if one has been proposed. Click **Orders for Signature** in the lower right corner to proceed to the next section.

16. On the next screen, click on the name of the procedure order you've just proposed *OR* click the **Missing Required Details** button in the lower left section of your screen. This will open the order form.

*Surgical Procedure Orders and Power Plans – Affiliated (cont.)*

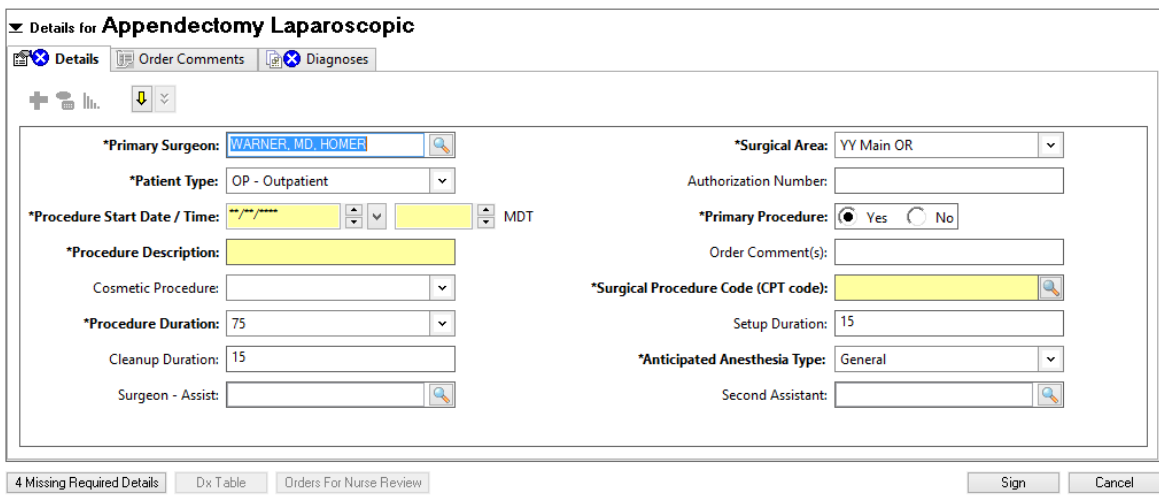


17. If needed, click and drag the top of the order details form higher on your screen so you can see the full form.



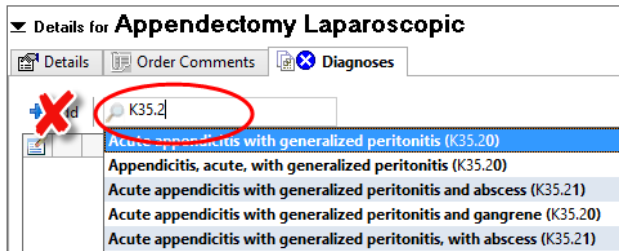
18. Fill in all the appropriate fields. Fields highlighted in yellow are required for placing the order.

**The Procedure Description field should have the full name of the procedure(s), including laterality (i.e. right or left).**



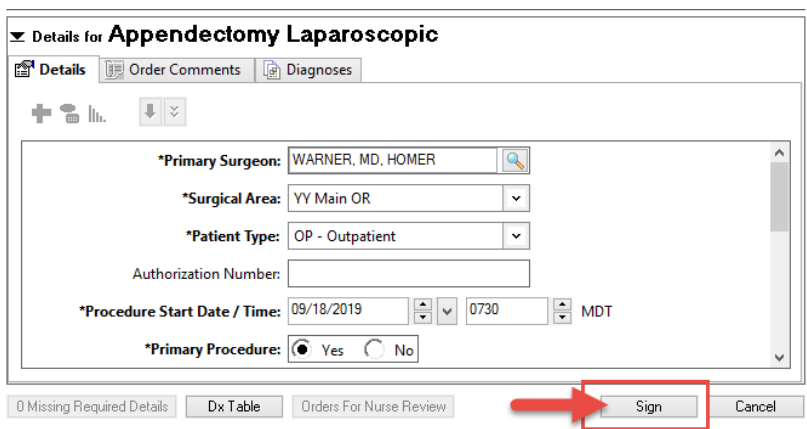


19. Next, click the **Diagnoses** tab and enter all applicable diagnoses. This can be done by description *OR* by code in the IMO search window.

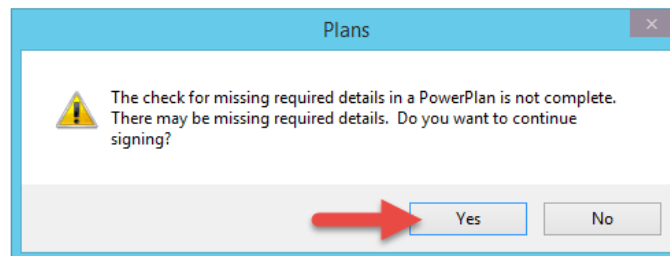


The +Add button uses a different search engine and is not recommended for those in the Affiliate – Surgical Services role. Use the IMO search window instead.

20. Once you have completed entering the order details and diagnoses, click **Sign** in the lower right corner of your screen.



21. If you are proposing a PowerPlan, you will get an alert that the “Check for Missing Details in a PowerPlan” is incomplete. The signing provider will be reviewing the PowerPlan and entering any missing details, so you



may simply click **YES** to continue signing.

22. The orders are now routed to the provider’s Message Center Inbox for signature:
  - a. The procedure order, if designated as an **Order**, is now in the OR Scheduler’s Work Queue to be reviewed and placed on the OR schedule. (The provider will need to co-sign the procedure order, but the scheduling communication does not have to wait for that co-signature before being seen by the OR scheduler.)
  - b. The PowerPlan (order set), designated as a **Proposal**, must be accepted by the provider before the orders can be acted upon. Once accepted, the proposal becomes a Future Order, ready to be

initiated and used by the lab, pre-admission nurses, pharmacy, surgical nurse and other caregivers involved in your patient's care. The procedure scheduling process is complete.

**Please Note:**

**If you need to change details such as date, time, place or order comments which don't change the nature of the surgery itself:**

- If the procedure order was entered with the status Order, PLEASE CALL THE OR SCHEDULING STAFF TO COMMUNICATE THESE CHANGES. **The Modify** selection found when right-clicking on the procedure order WILL NOT COMMUNICATE CHANGES TO THE OR.
- If the procedure order was entered with the status **Proposed** and has not yet been signed off by the provider, it may be withdrawn (right-click on the order and choose "Withdraw") and re-proposed with any needed date or detail change.

**If you need to change the procedure order, description, laterality, CPT, or ICD-10 codes:**

- YOU WILL NEED TO PLACE A NEW ORDER. Please call the OR scheduling staff to have them cancel the previous order and let them know you will place a new order, then place the new, correct order in iCentra.
- *The Modify selection found when right-clicking on the procedure order WILL NOT COMMUNICATE CHANGES TO THE OR.*

## Some Important Points to Remember:

### When choosing orders for a case with multiple procedures for one patient:

Choose the most complex procedure as the primary and choose its order from the Common Procedure List; add in all the codes for it and the other procedures you will be doing within the order details. For instance, if scheduling a Lap Appy, excision lesion, and a Chole, you would do one request, but put all three procedures in the “Procedure Description” field, and include the CPT codes for all procedures.

- The exception to this would be if the procedures are in different anatomical areas or involve differing surgical approaches, which necessitates different equipment and setup in the OR. In these cases, you will choose procedure orders for each of the different anatomical areas/approaches. For example, EGD and Colonoscopy have separate approaches and would have two procedure orders

### If a surgeon is doing a combination case with another surgeon:

For combo cases, such as an OB/GYN and a Urologist coordinating their surgeries for one patient, the more complex or longer case will be the primary case. This surgeon’s office will call to obtain the pre-registration FIN, then communicate the pre-reg FIN to the other office. Both offices will use the same pre-registration FIN for their procedure orders.

- The office with the primary case will send the PowerPlan. (There is no need for two PowerPlans, so the office with the secondary case need only send a procedure order and not a PowerPlan.)

### If you can’t find the procedure you need in the provider’s Common Procedure List,

First, look to see if there’s a more general order in the Common Procedure List that would do the job. For example, if you’re looking for “diagnostic laparoscopy with fulguration of endometriosis” but you can only find diagnostic laparoscopy”, choose that order and include the other information in the order details (Procedure Description field and the CPT codes).

If you can’t find an appropriate general order in the Common Procedure List, you can use the “Search New Order” field right above the **Personal/Public/Shared** buttons. This searches the comprehensive order catalog and will bring you any/every type of order that can be placed in iCentra. **USE EXTRA CAUTION!** Be sure to NOT use any orders which have “\$\$” at the beginning of the order name; these are billing orders for Intermountain-employed physicians and will NOT work to schedule procedures.



- **This process of looking in the Search New Order window for a procedure order should only be used in the RARE CASE in which your provider does not have a preference card for the procedure set up at the scheduling facility.** If this procedure is to be performed more than once, the provider needs to meet with the OR Nurse Specialists to set up preferences (and thus have a Common Procedure List order created) for that procedure. Please contact the OR to convey the message that your provider needs to set up a preference card for this procedure.

## Order Details Field Explanations

**Primary Surgeon:** Required

**Surgical Area:** Facility for Procedure

**Patient Type:**

**IO – Inpatient Only:** For surgeries that must be classified as inpatient stays for insurance to pay. **A pop-up message will appear when submitting a case to be scheduled letting you know that case should be an “inpatient only” case.**

Please select preadmit & surgery admit for your patient type when creating or requesting a FIN. An admit to inpatient PSO needs to be submitted.

**IP – Inpatient:** This is for patients that are already in the hospital and will go from surgery back to their room. Most offices will not use this admit type since a FIN has already been created for the patient. Instead of submitting a request through the queue the doctor will call scheduling to add on the case.

**OP – Outpatient:** Patient arrives at Same Day Surgery and will go home from Same Day Surgery on the date of surgery. Please select prereg & surgery ambulatory for your patient type when creating or requesting a FIN.

**SDA – Same Day Admit:** Patient will arrive at Same Day Surgery and after surgery they are admitted to the hospital for two or more nights. Insurance may require pre-authorization for the admission even if it is not required for the surgery. An admit to inpatient PSO needs to be submitted. Please select preadmit & surgery admit for your patient type when creating or requesting a FIN.

**OPB – Outpatient in a Bed:** Patient will arrive at Same Day Surgery and after surgery they are admitted to the hospital for one night or less. An Outpatient in a bed PSO needs to be submitted. Please select prereg & surgery extended recovery for your patient type when creating or requesting a FIN.

**Authorization Number:** For procedures with pre-authorization requirements

**Procedure Start Date/Time:** Date you would like the case to be scheduled. You likely won't know the start time. When in doubt, put 0700 or the start of your provider's block time.

**Primary Procedure:** Choose “Yes” for the Primary Procedure. If additional Procedures are ordered, choose “No” for the additional procedures.

**Procedure Description:** Required, this should be the same description of the procedure used on the patient surgical consent, ex. Laparoscopic Appendectomy.

**Order Comment(s):** Anything to be communicated to the scheduler or the OR regarding the case (ex. Rep name, Surgeon availability, etc.)

**Cosmetic Procedure:** For indicating whether any part or whole of the procedure is cosmetic.

**Surgical Procedure Code (CPT code):** Required; enter at least one CPT code. Codes are entered one at a time. Take care to choose the desired codes because once entered, they cannot be withdrawn without cancelling the order and starting over. These codes are used for planning and scheduling. Billing CPT codes will be pulled postoperatively from documentation of the actual procedure(s) performed.

**Procedure Duration:** Over time this will auto populate with the average time for this procedure. If not populated, please fill in with the number of minutes for the procedure. By clicking the drop-down menu, choosing “Override” and entering desired duration in minutes.

Setup Duration: Not required; OR staff will edit as needed.

Cleanup Duration: Not required; OR staff will edit as needed.

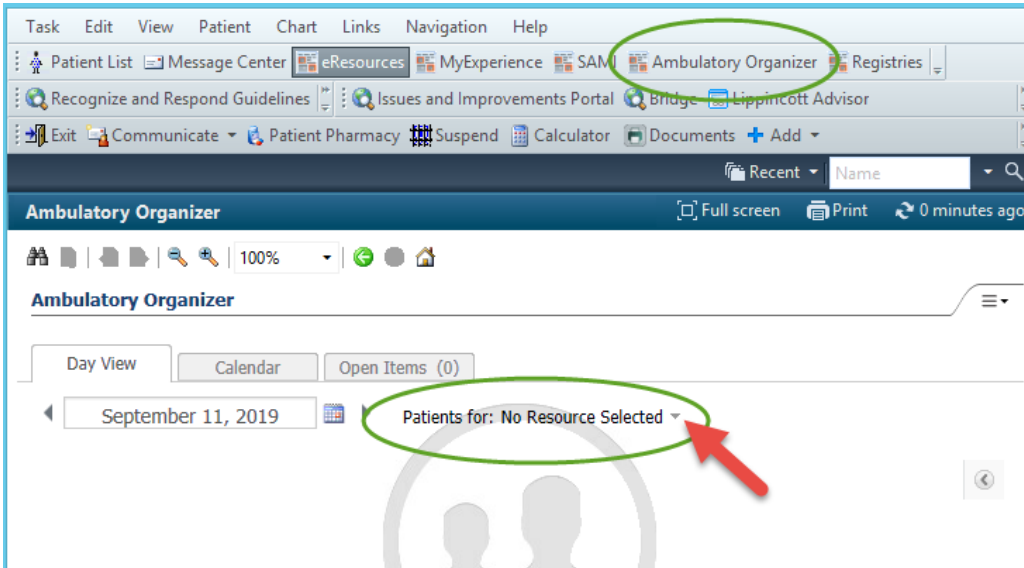
**Anticipated Anesthesia Type:** Required

Surgeon Assist: Not needed if already included in the Special Instructions Field above.

Second Assistant: Not needed if already included in the Special Instructions Field above.

## Viewing a Provider's OR Schedule in iCentra

1. Log in to iCentra PowerChart. Click on **Ambulatory Organizer** in the top tool bar.



2. Click on “Patients for: No Resource Selected” to search and select a provider’s name. After checking the box next to a provider’s name, click Apply to view the provider’s scheduled cases.

