

Procedure Pass for Surgeons



Audience: Surgeons

What is Procedure Pass (PXP)?






A robust tool to help prevent same-day surgery cancellations due to incomplete pre-surgical tasks, you can now monitor a list of those tasks and follow up on them as needed. The interactive checklist contains documentation that is required for every procedure, such as an H&P note, consent, as well as orders/labs that are specific to the procedure or circumstances, such as an EKG.

Benefits of PXP:

- Automates the pre-procedure checklist.
- Provides central place to track PAT and Pre-op tasks.
- Driven by standardized anesthesia PAT protocol.
- Improves patients' pre-operative experience and care.
- Decreases time spent reviewing charts.
- Decreases delays and cancellations due to prep.

Navigating PXP

You can quickly see what required procedure documentation still needs to be completed from the **Chart Prep** status board. This status board shows patients with upcoming surgeries who are not currently admitted. Each patient contains a column for corresponding procedure pass tasks.

-  Complete
-  Not Needed
-  In Progress
-  Not Started
-  Do Not Proceed

With the Procedure Pass implementation Epic recommends replacing the **H&P, Pre-op S&H Orders** and **Consent Collected** with **Procedure Pass** icons on the **My Cases Reports** for the surgeons.

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Current View

Surgical Cases - My Cases, Surgeon Specific Next 30 Days

Refresh | 7 Day View | 14 Day View | 30 Day View | Settings

Date	Patient Info	H&P	Pre-op S&H Orders	Consent	Add-on	Latex?	Pt Cla	minutes	Prj Times	Procedures	Anes Type	Status
01/14/2019	Optesia, Mon Female 33 years							76	1747 1903	Appendectomy, Laparoscopic - N/A	General	Scheduled
01/14/2019	Optesia, Eye Male 60 years							76	1631 1747	Appendectomy, Laparoscopic - N/A	General	Scheduled
01/14/2019	Joyce, Heart Male 67 years							60	1108 1631	Appendectomy - N/A	General	Scheduled
01/14/2019	Endoscopy, Joyce Female 34 years							60	1115 1631	Egd, With Stent Insertion - N/A	General	Scheduled
01/14/2019	Testing, Joyce Female 31 years							125	1141 1631	Biopsy, Laparoscopic - N/A	MAC w/ Local	Scheduled
01/18/2019	Optesia, Adele Female 38 years							76	0800 0916	Appendectomy, Laparoscopic - N/A	General	Scheduled
01/27/2019	Optime, Santa Male 81 years							49	1435 1524	Fissurectomy, Fistulectomy, Or Fistulotomy Of Anus - N/A	General	Scheduled

These icons are H&P Status, Order Status, and Consent Status. The plan is to change the Today, Next 7 Day View, Next 14 Day View, and Next 30 Day View reports.

Future View

Surgical Cases - test My Cases, SURGEON Specific Next 30 Days

Refresh | 7 Day View | 14 Day View | 30 Day View | Settings

Date	Prj Times	Patient Info	Procedures	Do Not	All Tas	H&P St	Orders	Consej	Proc a	Latex?	Pt Cla	Anes Type	Status
12/18/2018	1900 1949	Optesia, Bee Female 32 years	Thoracentesis - Right									None	Scheduled
12/19/2018	2130 2300	Optime, Test Female 63 years	Bronchoscopy, Using Electromagnetic Navigation, With Endobronchial Ultrasound - N/A									General	Scheduled
12/20/2018	1530 1722	Bap, Antibody Female 58 years	Abdominal/Retroperitoneal Mass Bx - Left									General	Scheduled
12/20/2018	1615 1751	Vad, Elsa Female 47 years	Cholecystectomy, Laparoscopic - N/A									General	Scheduled
12/20/2018	1408 1410	Holiday, Doc Male 57 years	Right Heart Cath - N/A									None	Completed
12/20/2018	1035 1135	Anesthesia, Aki Male 36 years	Appendectomy - N/A									General	Scheduled
12/23/2018	2205 2324	Optesia, Pxp Male 30 years	Appendectomy, Laparoscopic - N/A									General	Scheduled
12/26/2018	1640 1816	Fontina, Maggie Female 81 years	Cholecystectomy, Laparoscopic - N/A									General	Scheduled
12/27/2018	1530 1630	Kidney, Demo Female 40 years	Transplantation, Lung - Left									General	Scheduled
12/27/2018	0930 1158	Joyce, Heart Male 67 years	Laminotomy, Lumbar - N/A									General	Scheduled

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Zoomed in View of New Columns

Do Not	All Tas	H&P Si	Consel	Proc a	Orders

- **Do Not Proceed Comments**, if the provider (APEC NP, MD, or Anesthesia) marks them do not proceed this is for medical reasons (i.e. abnormal labs). If you hover over the icon, it will display the reason why the patient was marked.
- **All Tasks Complete?** to help determine if all the Procedure Pass tasks have been completed
- **H&P Status**, status of H&P
- **Consent Status**, status of Consent
- **Proc and Lab Status**, status of procedures and labs (CXR, etc.)
- **Orders Status**, status of Presence of Orders (Pre-op orders)

Tasks

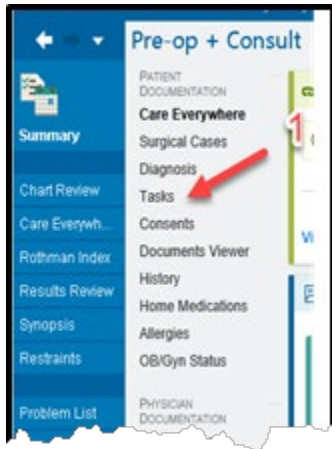
- The PXP activity will list **Tasks** that need to be completed prior to the patient's surgery. These tasks are populated by standardized anesthesia protocols or entered manually by staff.
- Once tasks are populated and as the patient moves through the PAT process, additional tasks can be added automatically and/or manually.
- **Tasks** are categorized by **Not Started**, **Started** and **Complete**. If a task is not needed, then the clinician can mark the item as **Not Needed**.

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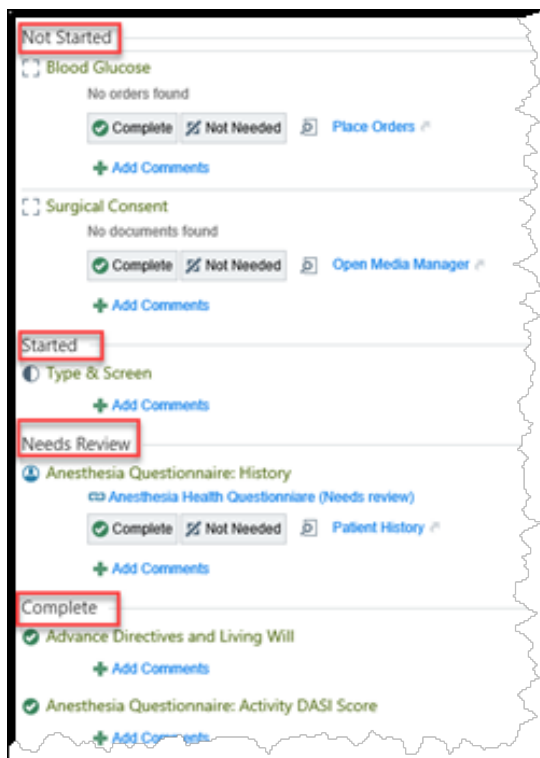


To access the Tasks list while in Pre-op + Consult

1. Under **Patient Documentation**, select **Tasks**.



2. The assigned tasks will display and show the status: **Not Started**, **Started**, **Needs Review** and **Complete**.



- As tasks are completed (either manually or automatically) they will fall into the **Complete** status. The PAT nurses will be managing the **Tasks** checklist and make you aware if something is missing.

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Anesthesia Questionnaires

With **Procedure Pass**, when a surgery is scheduled, if a patient has MyChart setup the patient will receive two **Anesthesia Questionnaires** for clearance. The first is an activity questionnaire which uses the **Duke Activity Scoring Index**. The second is a **Health History** questionnaire that asks for medical and surgical history. The PAT/Pre-op Nurses will review this information with the patient during the visit or phone call and the information will be added to the History section in Epic.

Do Not Proceed Status

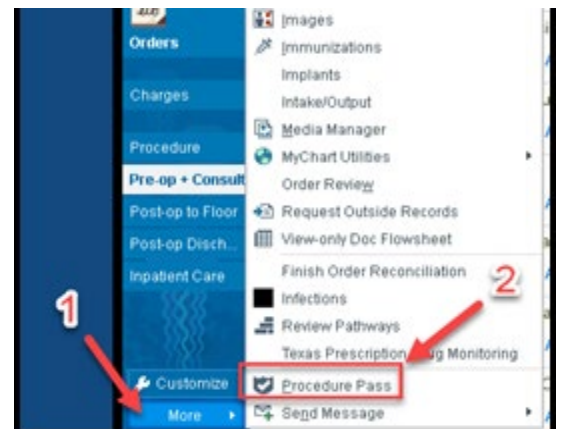
If a patient is not ready for surgery, surgeons and anesthesia providers are able to mark the procedure as **Do Not Proceed**. For example, the provider may mark the patient's chart as **Do Not Proceed** if the lab results are abnormal and the patient's case needs to be rescheduled. This appears at the top of the **Tasks** list and on status boards.

Warning:

Placing a procedure as **Do Not Proceed** does not automatically cancel the case. You will still need to communicate with the schedulers, so that the case can be cancelled off the Snapboard.

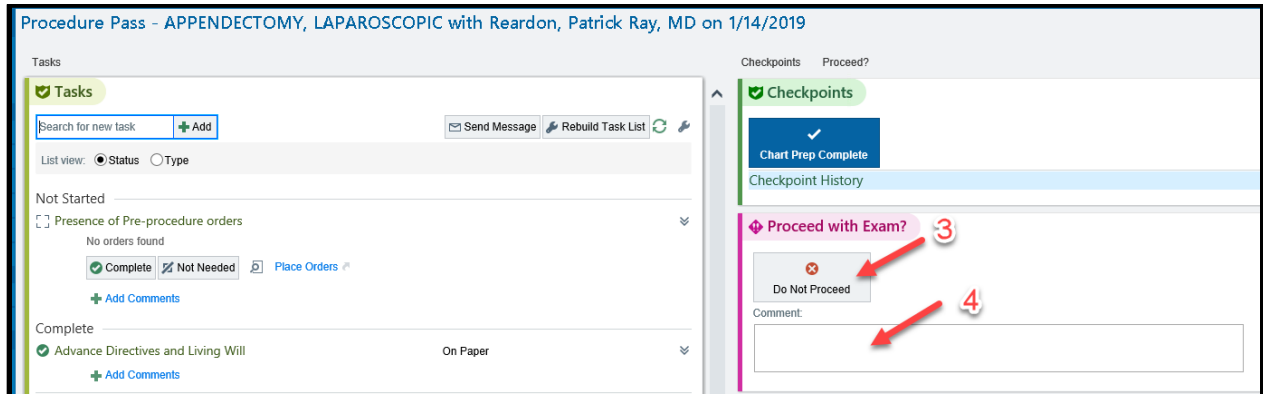
To access the Do Not Proceed button

1. Click on the **More** activity, at the bottom left of the screen.
2. Select **Procedure Pass**.

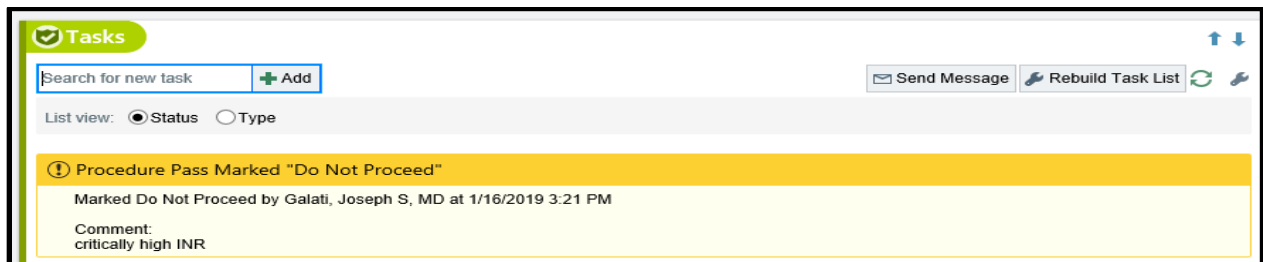


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3. Click on **Do Not Proceed**.
4. Enter the reason for marking the patient as **Do Not Proceed**.



5. Close the activity.
6. Go back to the **Tasks** activity and the **Do Not Proceed** task will be at the top with the reason for not proceeding with the case.

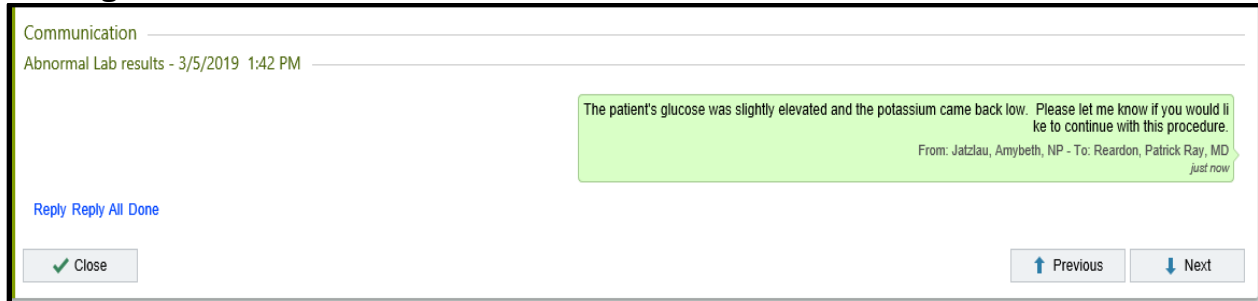


Communication

Clinicians can communicate about Procedure Pass Tasks via InBasket messages. The information communicated will also display in the Tasks section under Communication.

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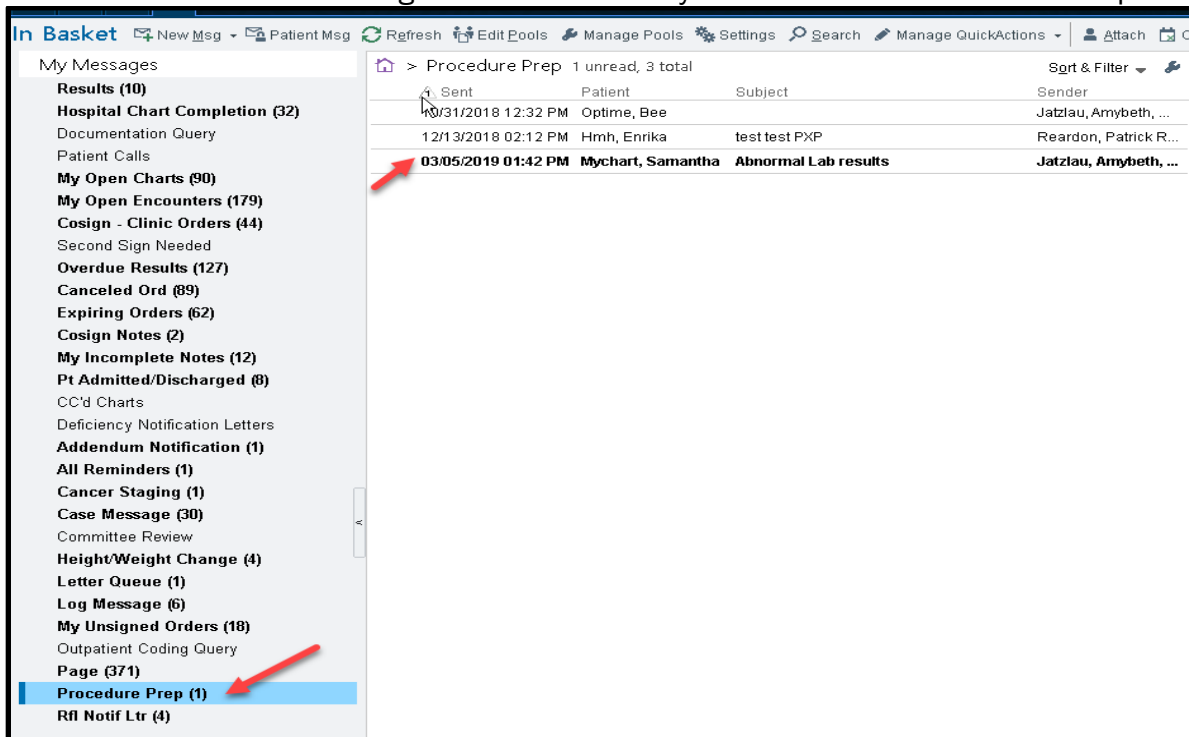
- You can also respond using one of the blue hyperlinks (**Reply**, **Reply All**, or **Done**) below the message.



- Once the issue that you are discussing is resolved you can select Done. This will put a green check mark to say this is complete like the other tasks.



- You can also view these messages in InBasket. They are found under Procedure Prep.



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- The Procedure Pass Tasks will be displayed underneath the message.

Abnormal Lab results Received: Today
 Jatzlau, Amybeth, NP → Reardon, Patrick Ray, MD
 Phone Number: 832-522-3204
 The patient's glucose was slightly elevated and the potassium came back low. Please let me know if you would like to continue with this procedure.

AMPUTATION, BELOW KNEE - Lower with Reardon, Patrick Ray, MD on 2/6/2019
 All Tasks Complete: No
 All Tasks Complete as of Scheduled Start: No
 Scheduled Start: 2/6/2019 10:15 AM

Task	Status
Not Started	
Advance Directives and Living Will	No attached document
Basic Metabolic Panel (BMP)	No attached procedure
BUN/Creat2 (only for procedures with dye and pt. over 40)	No attached procedure
Complete Blood Count (CBC)	No attached procedure
ECG	No attached procedure
H&P	No attached note
Nurse Practitioner Review	
PAT Call	
Pre-op Call	
Pregnancy Test	None
Presence of Pre-procedure orders	None
Surgical Consent	No attached document
Type & Screen	No attached procedure
Started	
Anesthesia Questionnaire: Activity DASI Score	
Anesthesia Questionnaire: History	

Reports

Procedure Pass Tasks are also viewable on the **Schedule**, in **Surgery Report**, under **Additional Tasks**.

Additional Tasks

Task	Status
Not Started	
Advance Directives and Living Will	No attached document
Anesthesia MD Review	No attached procedure
BUN/Creat2 (only for procedures with dye and pt. over 40)	No attached procedure
H&P	No attached note
Nurse Practitioner Review	
Pre-Admission Testing Visit	No attached appointment
Pre-op Call	
Pregnancy Test	None
Presence of Pre-procedure orders	None
Surgical Consent	No attached document
Type & Screen	No attached procedure
Started	
Anesthesia Questionnaire: Activity DASI Score	
Anesthesia Questionnaire: History	