



Day of Surgery Cancellations Before the OR

June 23, 2026

This flyer outlines the steps to follow when a surgical case is canceled before the patient is transferred to the OR, so staff can complete the correct actions, close documentation appropriately, and keep perioperative tracking accurate.

Team Roles in Surgical Case Cancellation Before OR Transfer

➤ Scheduler/Registration

- Notifies the PreOp area that the case was canceled, or the patient was a no-show.
- Handles the cancellation when no perioperative documentation has been opened.

➤ PreOp Nurse

- Determines whether the patient entered the PreOp area when perioperative documentation has been opened.
- Completes the appropriate cancellation workflow based on whether the patient entered the PreOp area.

➤ Surgeon

- Completes an H&P Update note if the patient was seen before the case was canceled.

If the Surgical Case Is Canceled Before the OR

Responsible role: Scheduler/Registration

1. Confirm that the case has been canceled and notify the PreOp area to determine whether any perioperative documents have been opened.
 - **If no perioperative documents have been opened**, Scheduler/Registration completes the cancellation in Scheduling and notifies the PreOp area.
2. Scheduler/Registration: Cancel the appointment from the Appointment Book.
 - Verify the case displays as canceled in Scheduling, Case Selection, and Perioperative Tracking.

If the Patient Has Not Entered the PreOp Area

Responsible role: PreOp Nurse

1. If perioperative documents have already been opened, determine whether the patient has entered the PreOp area before completing the next steps.
2. Terminate the PreOp record with the appropriate reason.
3. Select the option to postpone charges.

NOTE: Select Postpone Charges so the surgical biller can review the chart later and decide if any charges need to be entered.

Terminate Document

Select a reason for terminating the document.

- ☒ None
- ☐ Anesthesia Problems
- ☐ Case Cancelled in OR
- ☐ Case cancelled in PreOp
- ☐ Case Done In Other Area
- ☐ Check In Error

Charge Options

☒ Postpone charges for this document.

☐ Send charges for this document

- ☐ Acuity Level Charges
- ☐ Anesthesia Charges
- ☐ Case Level Charges
- ☐ Pick List Charges
- ☐ Procedure Charges
- ☐ Room Charges

OK Cancel

4. Set the case cancel event within Perioperative Tracking.
5. Coordinate with the appropriate personnel to terminate any later perioperative records.

If the Case Is Canceled in the PreOp Area

Responsible role: PreOp Nurse

1. Complete documentation of any nursing care provided and sign the PowerForm(s).
2. Discontinue all perioperative PowerPlans.
3. Document all times in the **Case Times** segment except for the **Transport to OR** time.
4. Document the **Case Cancel** segment with the appropriate reason in the Pre-Op record within Perioperative Doc.
5. Complete and finalize the PreOp record, then set the case cancel event within Perioperative Tracking.

If the Patient Was Seen by the Surgeon

Responsible role: Surgeon

1. If the surgeon saw the patient before the case was canceled, complete an H&P Update note with cancellation reasons.