



Day of Surgery Cancellation OR Cancellation Workflow

June 23, 2026

This flyer explains what to do when a surgical case is cancelled after anesthesia or perioperative documentation has started. Use the steps below to close the correct records, handle charges appropriately, and keep perioperative tracking accurate.

Team Roles in Surgical Case Cancellation

Follow this workflow when a case is cancelled after the anesthesia record, preanesthesia evaluation, or intraoperative documentation has already begun. Move through each section in order based on what has already happened in the case.

➤ **Anesthesiologist/CRNA**

- Confirms whether the anesthesia record or preanesthesia evaluation was opened.
 - Completes or removes anesthesia documentation based on whether care was provided.

➤ **Circulator RN**

- Completes, terminates, and finalizes the intraoperative record based on whether the patient entered the OR and whether items were opened or filled.
 - Ensures charges and perioperative tracking are updated correctly and coordinates termination of later perioperative records.

➤ **Recovery RN**

- Continues PACU or Phase II recovery when the cancellation occurs after medications or anesthesia were given and recovery care is needed.

➤ **Surgeon**

- If the patient entered the OR, document why the case was cancelled in an **H&P Update** note.

After Anesthesia Documentation Starts

Responsible role: Anesthesiologist/CRNA

1. Start with the anesthesia record. Determine whether the Anesthesia Record has been opened.
 - If the Anesthesia Record was opened, determine whether any care was provided outside of the preanesthesia evaluation.
 - If the Anesthesia Record was not opened, determine whether the preanesthesia evaluation was started.
2. Complete the correct anesthesia documentation based on the care provided.
 - If care was provided, complete the documentation of care, finalize the anesthesia record, then complete the preanesthesia evaluation, document the cancellation reason, and sign the note.

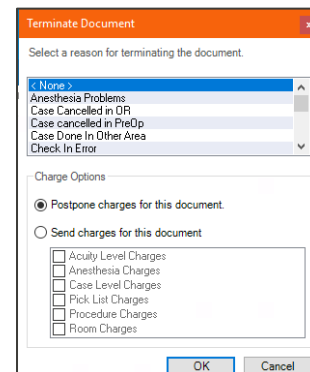
- If no care was provided outside of the preanesthesia evaluation, contact the appropriate personnel to have the anesthesia record disassociated from the case and deleted.
- If only the preanesthesia evaluation was started, complete the evaluation, include the cancellation reason, and sign the note.

If the Patient Did Not Enter the OR

Responsible role: Circulator RN

1. Determine whether any pick list items were physically opened.
2. If pick list items were opened, complete the pick list documentation.
3. If items were filled for the case, perform a batch return.
4. Terminate the intraop record and select the appropriate termination reason.
5. 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.**



If the Patient Entered the OR

Responsible role: Circulator RN

1. Complete the pick list documentation.
2. Change the procedure to Procedure Not Performed.
3. Document all segments based on the care provided, including the **Case Cancelled** segment.
4. Discontinue any unused segments and select the reason **Case Cancelled in OR**.
5. Finalize the intraop record.
6. Set the case cancelled event in perioperative tracking.
7. Confirm the case displays as cancelled.

Surgeon Documentation After OR Entry

Responsible role: Surgeon

1. If the patient entered the OR, document why the case was cancelled.
2. If no care was provided, complete an **H&P Update** note.

Recovery and Final Case Status

➤ Recovery RN decision

- Decide whether the case was cancelled after medications or anesthesia were given and whether the patient needs recovery care.
 - If recovery care is needed, continue with PACU or Phase II recovery.
 - If recovery care is not needed, continue the cancelled-case workflow and make sure all related records are closed correctly.

➤ Final check

- Confirm that the case cancelled event was set, charges were handled correctly, and any later perioperative records were terminated as needed.