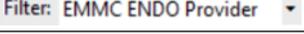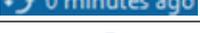This Quick Reference Guide (QRG) demonstrates the workflow for performing Surgeon Tasks in SurgiNet.

Common Buttons & Icons

Case Selection	**Case Selection** icon
Location	**Location** icon
(down arrow)	**Calendar** down arrow
Retrieve	**Retrieve** button
Filter: EMMC ENDO Provider	**Perioperative Tracking** filter
(blue arrow)	**Patient Chart** blue arrow
(tray icon) 0	**Orders for Signature** tray
First Detail	PowerPlan **First Detail** button
(collapse arrow)	**Details Collapse** icon
+ Add	**Add** icon
(X icon)	**Missing Details** icon
0 minutes ago	**Refresh** icon
Discharge	**Discharge Med Rec** hyperlink
(green arrow)	**Continue Medication** icon
(bottle icon)	**Convert the medication to prescription** icon
(orange square)	**Discontinue medication** icon

Setting the Location

➢ From the Message Center:

STEP 1: Click **Case Selection** in the toolbar.

STEP 2: **Click Location.**

STEP 3: Click the location from the list within either the Existing or Recent tabs.

NOTE: **Use the + icon to expand options for a certain location as needed.**

STEP 4: Click **OK.**

Search for a Case

➢ From the Case Selection screen with the location set:

STEP 1: Search by Date first by verifying the Date radio button is selected. This is the default search option.

NOTE: **To search by Person, Case Number, Provider, or MRN click the appropriate radio button and enter the needed criteria. Then, click Retrieve.**

STEP 2:   Enter the **From** and **To** dates either by typing or using the Calendar down arrow for each field.

STEP 3:   Click **Retrieve**.

NOTE: **When the search is complete, if a patient is not checked in, do not check them in. Check in is the responsibility of Nursing, Unit Secretary, or Registration and is different in each facility.**

Filter Cases in Perioperative Tracking

➢ From the Case Selection screen:

STEP 1:   Click **Perioperative Tracking** in the toolbar.

STEP 2:   Click the **Perioperative Tracking** board needed.

STEP 3:   Click the Filter dropdown arrow.

NOTE: **Timeframes available for filtering are dependent the current location.**

STEP 4:   Select the appropriate filter.

Navigate to a Patient Chart

➢ From the Perioperative Tracking Board:

STEP 1:   Double-click the patient chart blue arrow icon.

STEP 2:   Assign a relationship.

Placing PowerPlans

➢ From the Provider View within the patient chart:

STEP 1:   Click the **General Surgery Quick Orders** MPage tab.

STEP 2:   Scroll to find the PowerPlans component.

STEP 3:   Click the desired PowerPlan.

STEP 4:   Click the **Orders for Signature** tray.

STEP 5:   Click **Modify Details**.

STEP 6:   Review the default selected orders for the PowerPlan making changes as needed.

STEP 7:   Select additional orders checkboxes as needed to add to the PowerPlan.

STEP 8:   Click **Plan for Later** or **Initiate Now**.

NOTE: As a reminder, surgical nurses are able to initiate PowerPlans once all missing details are addressed. Policy states that if there are missing details, they reach out to the surgeon to resolve.

STEP 9: Click **Sign** for the PowerPlan.

Address Missing Details in a PowerPlan

➢ From the Orders page within the patient's chart:

STEP 1: Click the **First Detail** button of the Orders Services window if it pops up while signing a PowerPlan.

STEP 2: Click the **Missing Detail** icon for the order.

STEP 3: Review the order making sure that all information with an asterisk and/or are highlighted yellow are addressed.

NOTE: Once all missing details are addressed the Missing Details icon disappears.

STEP 4: Click the order **Details Collapse** icon.

STEP 5: Address any other missing details.

STEP 6: Click **Plan for Later** or **Initiate Now**.

STEP 7: Click **Sign**.

STEP 8: Click the **Refresh** icon.

Initiate the PowerPlan

➢ From the Orders page within the patient's chart:

STEP 1: In the View pane, click the desired PowerPlan to initiate.

STEP 2: Review for accuracy.

STEP 3: Click **Initiate Now**.

STEP 4: Associate the PowerPlan to a diagnosis.
- Click **Add** in the Diagnosis Selection.
- Click the **Diagnosis** field.
- Enter the diagnosis.
- Click the **Binoculars** icon.
- Click the needed Codified diagnosis.
- Click **OK** once the diagnosis is selected.
- Review the information in the Add Diagnosis window and update as appropriate.

- Click **OK** in the Add Diagnosis window.
- Click **OK** in the Diagnosis Selection window.

STEP 5: Click **Orders for Signature**.

STEP 6: Review for accuracy.

STEP 7: Click **Sign**.

STEP 8: Click the **Refresh** icon.

Drafting Notes with a Template

➢ **From the Provider View within the patient chart:**

STEP 1: Scroll down the component menu to the bottom where the Dynamic Document notes are accessible.

STEP 2: Click **More**.

STEP 3: Click **Select Other Note**.

STEP 4: Document appropriate note information in the left side pane.

STEP 5: Search for the appropriate procedure note template.

STEP 6: Click the **template**.

STEP 7: Click **OK**.

STEP 8: Draft the note.

STEP 9: Click **Save**.

Complete an Op Note

➢ **From the Provider View within the patient chart:**

STEP 1: Scroll down the component menu to the bottom where the Dynamic Document notes are accessible.

STEP 2: Click the **Op Note** hyperlink.

STEP 3: Click the space below the heading to enter free text information.

NOTE: **This can be done by typing or using MModal.**

STEP 4: Click **Sign/Submit**.

STEP 5: Review the Sign/Submit Note window for accuracy making adjustments as needed.

STEP 6: Click **Sign**.

Modify an Op Note

➢ **From the Provider View within the patient chart:**

<u>STEP 1:</u>   Click **Documents** in the component list menu.

<u>STEP 2:</u>   Click the **Op Note**.

<u>STEP 3:</u>   Click **Modify** at the top of the Op Note.

<u>STEP 4:</u>   Click the section to modify and make changes.

<u>STEP 5:</u>   Click **Sign**.

Discharge a Patient

➢ **From the Provider View within the patient's chart:**

<u>STEP 1:</u>   Click the **Discharge** MPage tab.

<u>STEP 2:</u>   Navigate to the components with a red asterisk and complete the required documentation.

Complete a Discharge Med Rec

➢ **From the Discharge Medications component of the patient's chart within Provider View:**

<u>STEP 1:</u>   Click the **Discharge Med Rec** hyperlink.

<u>STEP 2:</u>   Review the listed medications and indicate if it should continue, convert to a prescription, or discontinue by clicking the appropriate radio button.

<u>NOTE:</u>   **The green arrow icon continues a medication. The Pill Bottle icon converts the medication to a prescription. The Discontinue icon discontinues the medication after discharge.**

<u>STEP 3:</u>   Add medication orders as appropriate.

- Click **Add**.
- Search for the medication if needed.
- Click the **medication order**.
- Click to add an order sentence if needed.
- Click **Done**.
- Add the medication order details.
- Clicks the **Details Collapse** icon once the order details are documented.
- Click **Sign**.

Document Discharge Follow Up

➢ From the Follow Up component within the Discharge MPage of the patient's chart:

STEP 1:   Click the **Add Follow Up** template as appropriate.

STEP 2:   Click **Modify** for the Follow Up just selected.

STEP 3:   Modify the follow up information as appropriate.

STEP 4:   Click **Save**.

Document Patient Education

➢ From the Patient Education component within the Discharge MPage of the patient's chart:

STEP 1:   Click the education as appropriate.

NOTE: **Quick Suggestions populate based on the This Visit problem. Use a Quick Suggestion, search for more options using the Magnifying Glass icon, or use set Favorites.**

STEP 2:   Review that the Education Language is set appropriately, English is the default.

STEP 3:   Modify, Print, or Remove the education as needed using the appropriate buttons.

Document Free Text Components

➢ From the free text component within the Discharge MPage of the patient's chart:

STEP 1:   Click the **component**.

STEP 2:   Enter patient instructions by typing or using MModal.

STEP 3:   Click **Save**.