Northern Light Health

From the Office of Clinical Informatics

Quick Reference Guide (QRG)
SurgiNet - Perform Surgeon Tasks

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This Quick Reference Guide (QRG) reviews Surgeon Tasks in SurgiNet

Common Buttons & Icons

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

Setting your Location

➢ From the Message Center:

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

STEP 2: Click **Location**.

STEP 3: Click your 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 your search is complete, if you notice 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 you need.

STEP 3: Click the Filter drop-down arrow.

NOTE: **Timeframes available for filtering are dependent on your 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 PowerPlan you need.

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 check boxes as needed to add to the PowerPlan.

STEP 8: Click Plan for Later or Initiate Now based on your needs.

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 depending on what you need.

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 PowerPlan you want 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 your 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: **You can do this 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

STEP 1: Click **Documents** in the component list menu.

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

STEP 3: Click **Modify** at the top of the Op Note.

STEP 4: Click the section that you need to modify and make changes.

STEP 5: Click **Sign**.

Discharge a Patient

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

STEP 1: Click the **Discharge** MPage tab.

STEP 2: 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:

STEP 1: Click the **Discharge Med Rec** hyperlink.

STEP 2: Review the listed medications and indicate if you want to continue, convert to a prescription, or discontinue the medication by clicking the appropriate radio button.

NOTE: **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.**

STEP 3: 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 your 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**.