

University of Toledo Ambulatory Services Guideline

Title: Physician Surgery Scheduling in Athena

Purpose: This guideline outlines the procedures and documentation needed to assure accurate and safe scheduling of patient procedures and surgeries.

Related Policies: 3364-101-02-01 Ambulatory Medical Record

Accountability: It is the responsibility of the treating provider to enter the required fields listed below into the electronic medical record (EMR) for surgery/procedure scheduling.

Standard Operating Procedure:

1. For patients currently being treating in the office:
 - Provider will order the Surgery/Procedure to be scheduled in the EMR and route it to his/her delegate's EMR Clinical Inbox (provider staff/surgery scheduler).
 - Clinic staff may document a Patient Case in the EMR and order a surgery/procedure which will be sent to the provider for approval prior to being scheduled.
2. For Patients not seen in the office:
 - If the patient does not have an EMR name and number, an EMR registration is required before proceeding.
 - The provider should document a Patient Case in the EMR and place an order for the planned treatment and route to their delegated designee's EMR Clinical Inbox (provider staff/surgery scheduler). Alternatively, the provider can email the required information (number 3 below) to his/her designee for order entry into the EMR and then follow the guideline section 1, point 2.
3. Required documentation by the Provider in the EMR:
 - Procedure needing to performed
 - Anesthesia type
 - Position
 - Side
4. Additional documentation required by delegated staff:
 - Location where the procedure will be performed(George Isaac/Main OR)
 - Admission Status
 - Duration of the procedure
 - Special Instruments-If vendor needed, include name of vendor (i.e. Medtronic)

- Specify type of medical clearance if needed
- Pre-procedure Orders-labs, x-rays, medications, medication holds etc.

Approved 1/2017 by: Susan Van Camp RN, CRRN Ambulatory Performance & Staff Development
Director
Revised/Reviewed: