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# Login to the Surgeries Scheduler app Login Access <u>https://surgeries.larkinhealth.com</u> to log in to the Surgeries Scheduler App. Input your email and password and click the Log In button.





### Forgot Password

If you are a Larkin employee, your account will be associated with the active directory account, so you will need to contact IT department or use the tools provided for changing or resetting your password.

					-
lice a	local	account	to	loa	in
USC u	local	account	.0	iug	

Password	
Remember me	
Remember me	

If you are not a Larkin employee and you cannot remember the password to access your account, click "Forgot your password?". This will open a window where the user can input their email.

Forgo	ot your password?
Enter you	r email.
Email	
Submit	

Once the email is entered, click on Submit button. A confirmation page will be shown.





You should receive a link that will send you to the following page, where you can change the password.

Email		
Password		
Confirm passu	ard	

# Logout

To logout press the button "Logout" at the top right of the Application

LARKIN COMMUNITY HOSPITAL	ler - OR Team Home Surgeries RM Templates			Logout
	Surgeries			÷
	Total Surgeries Performed	Scheduled Surgeries	Submitted RMs	
	12,407	53	3	



# User Profile

To access your user profile, click your username at the top right of the application.

Home Surgeries RM Templates	Hello LarkinUser@larkintest.com!	ut
	I.	
Scheduled Surgeries	Submitted RMs	
52	3	
	Home Surgeries RM Templates  Scheduled Surgeries  52	Home Surgeries RM Templates     Hello LarkinUser@larkintest.com!     Logo       Scheduled Surgeries     :       52     3

### The following page is shown.

LARKIN COMMUNITY HOSPITAL	heduler - OR Team Home Surgeries RM Templates	Hello LarkinUser@larkintest.com! Logo
Manage your	account	
Change your acco	unt settings	
Profile	🕑 User profile	
Email	Update your personal information	
Password	Username	
Signature	LarkinUser@larkintest.com	
	Phone number	
	<ul> <li>Enable Text Notifications</li> <li>Submit</li> </ul>	

To enable text notifications press the checkmark next to the text.

🕑 User profile	
Update your personal information	
Username	
LarkinUser@larkintest.com	
Phone number	
Enable Text Notifications	
Submit	

# Phone Number

The first option (Profile) shows you your username and phone number associated with your account.

You can modify the phone number in this section.



### Change Email

If the user is a Larkin employee, to change email you must contact the IT department, or use the tools provided for that. This option will not be shown for employees.

Change emails by clicking the "Email" button and inputting your new desired email

Manage youi	r account	
Change yo <mark>ur</mark> acco	ount settings	
Profile	🖍 Email	
Email	Update your email	
Password		
Signature	Email	
Signature	LarkinUser@larkintest.com	√
	New email	
	LarkinUser@larkintest.com	

### Change Password

Your password has been changed.

If the user is a Larkin employee should contact the IT department, or use the tools provided for that. This option will not be shown for employees.

In order to change password, click the **Password** button and type in your current and new desired password.

ARKIN MMUNITY OSPITAL	heduler - OR Team <sub>Hor</sub>	me Surgeries RM Templates	Hello LarkinUser@larkintest.com!
Manage your	account		
Profile	Password	4	
Email	Change password	a d	
Password			
Signature	Current password		
	New password		
	Confirm new pass	sword	
	Submit		

After click on "Update password" button the following confirmation message appears:





# Create / Update your signature

To create (draw) your signature, use the cursor and left click, (or pen on a touch screen device) to draw it, and then click Submit Signature.

OSPITAL	Home Surgeries KM templates	Helio Larkinoser@larkintest.com
Manage your	account	
change your acco	unt settings	
Profile	🔊 Signature	
Email	Drag your signature	
Password		
Signature		
	5 ×	

When the Signature is submitted this message will appear.

Your signature has been updated

To re-do or create a new signature, use the empty canvas and click Submit Signature again.

Signature			
Current signature			
- )			
5			
<mark>ک</mark> د			
Submit Signature			

Signature is required for the Physician role, in order to approve the Reservation memos.



## Pre-Orders Template

Through this option you can create a template for the most used pre orders medications. To add to the template, click the "+" button.

Manage your	account	
Change your acco	ount settings	
Profile	Pre-Order Templates	
Email	Add templates for Reservations	
Password		
Cloud and		

Type in the medication to add it to the template and click "Save Changes" to add it to the list of commonly used medication.

	Add template	
Manage your accou	ni <sub>Text</sub>	
Change your account setti	ng Pre-Order Template	•
Profile		
Email	A Close Save char	nges
Password		
Signature		
Pre-Order Templates		

To remove a template, click the "X" icon to remove it from the list.

Pre-Order Templates	
+	
Name	Action
Pre-Order Template	×



# Surgeries Dashboard

In this page, some summary info about the surgeries is shown. It varies depending on the role of the user.

Total Surgeries F	Performed	Scheduled Surgeries		Submitted RMs	
1	2,408	52		4	
<u></u>					
Scheduled Surg	eries Details	<b>1</b>			
Scheduled Surge	Patient	Physician	Procedure	2	
Surgery Date Mon 27 Mar	Patient GLENDA BLANCO	Physician CORCES ARTURO	Procedure KNEE ART	e HROPLASTY TOTAL	-
Scheduled Surge Surgery Date Mon 27 Mar Mon 27 Mar	Patient Patient GLENDA BLANCO DIAZ GARCIA	Physician CORCES ARTURO CORCES ARTURO	Procedure KNEE ART HIP TOTAL	e HROPLASTY TOTAL L ARTHROPLASTY	
Scheduled Surge Surgery Date Mon 27 Mar Mon 27 Mar Thu 23 Mar	Patient GLENDA BLANCO DIAZ GARCIA GARCI HERNANDEZ	Physician CORCES ARTURO CORCES ARTURO RAJA HARISH	Procedure KNEE ART HIP TOTAL PHACOEN IMPLANT	e HROPLASTY TOTAL L ARTHROPLASTY AUSIFICATION WITH INTRAOCULAR LENS	
Scheduled Surge Surgery Date Mon 27 Mar Mon 27 Mar Thu 23 Mar Wed 22 Mar	Patient Patient GLENDA BLANCO DIAZ GARCIA GARCI HERNANDEZ WILFREDO FRANCO	Physician CORCES ARTURO CORCES ARTURO RAJA HARISH CORCES ARTURO	Procedure KNEE ART HIP TOTAL PHACOEN IMPLANT REVISION	e HROPLASTY TOTAL L ARTHROPLASTY JUSIFICATION WITH INTRAOCULAR LENS L OF TOTAL KNEE ARTHROPLASTY	

#### Use the time filter dropdown to filter surgeries

🖽 Grid  👹	Schedu	ler					Current Month	New Reservation Memo	Save View	Reset Vie	N
Domensory							Current Month				
X Excel							3 Months				
Drag a column	header ar	d drop	it he	re to group by that co	olumn		6 Months				
							Current Year				
OR Case	Surg	ary	:	Patient	:	Physician	Since Last Year		:	Location	
Ŧ	E	1			T		All surgeries		T		

Save View can be used to save the dashboard's current filtered settings, such as procedures.

🖽 Grid 🎽	Scheduler				Curr	rent Month 🔻 New Reservation Memo Save V	iew	Reset View
Excel								
)rag a column hi	eader and drop it h	ere to group by that	column					
OR Case	Surgery	Patient	:	Physician	1	Procedure	÷.	Location
T			Ŧ		T	HIP TOTAL ARTHROPLASTY × Y	Ÿ.	
						HIP TOTAL ARTHROPLASTY		LCH OR2
						HIP TOTAL ARTHROPLASTY		LCH OR2
						HIP TOTAL ARTHROPLASTY		LCH OR2
						HIP TOTAL ARTHROPLASTY		LCH OR2
						HIP TOTAL ARTHROPLASTY		LCH OR2
						HIP TOTAL ARTHROPLASTY		LCH OR2
						HIP TOTAL ARTHROPLASTY		LCH OR2
						HIP TOTAL ARTHROPLASTY		LCH OR2
						HIP TOTAL ARTHROPLASTY		LCH OR2
						HIP TOTAL ARTHROPLASTY		LCH OR2
								•

To reset the current filtered settings use "Reset View" to go back to the default grid view.



### Surgeries Section

To access the surgeries grid, click the "Surgeries" button in the top left of the application.

I Grid		Schedul	ar				Curr	ent Month 🔻	New Reservation Memo	Save View	Reset View
X Exce	el										
Drag a col	umn he	eader and	drop <mark>i</mark> t h	ere to group by that	column						
OR Case	÷	Surger	y I	Patient	1	Physician	:	Procedure		:	Location
	T	6	T		T		T			T	

### Surgeries View (Grid)

Surgeries grid has sections detailing the Surgery Date, name of the patient, physician, procedure, and the location and status of the surgery.

🖽 Grid 📋 S	Scheduler				Curr	ent Month 🔻 New Reservation Memo Save View	Reset View
Excel							
Drag a column he	eader and drop it h	ere to group by that c	olumn				
OR Case	Surgery	Patient	:	Physician	:	Procedure :	Location
T	<b>T</b>		T		T	Y	
				CORCES ARTURO		27447 LEFT TOTAL KNEE ARTHROPLASTY	
				CORCES ARTURO		27446 RIGHT KNEE UNICONDILAR POSSIBLE TOTAL KNEE ARTHROPLASTY	
23051067696				CORCES ARTURO		KNEE ARTHROSCOPY	LCH OR3
23053067727				CORCES ARTURO		HIP TOTAL ARTHROPLASTY	LCH OR2
23053067728				CORCES ARTURO		KNEE ARTHROPLASTY TOTAL	LCH OR3
23048067665				CORCES ARTURO		HIP TOTAL ARTHROPLASTY	LCH OR2
23051067697				CORCES ARTURO		KNEE ARTHROPLASTY TOTAL	LCH OR1
23038067565				CORCES ARTURO		KNEE ARTHROPLASTY TOTAL	LCH OR1
23044067623				CORCES ARTURO		HIP TOTAL ARTHROPLASTY	LCH OR2
23051067700				MURRAY TIMOTHY G		PHACOEMUSIFICATION WITH INTRAOCULAR LENS IMPLANT	LCH OR4
4							+



# Columns (Grid)

To remove/add columns to the grid view, click the button next to the Column name as shown below

🖽 Grid 🗯 S	icheduler					Curre	ent Month	•	New Reservation Memo	Save View	Reset View
Excel											
Drag a column he	ader and d	rop it h	ere to group by that colun	n							
OR Case 🔃	Surgery.	. :	Patient	:	Physician	:	Procedure			:	Location
T		T		T		T	1			T	

Mouse over "Columns" dropdown, and select the rows you wish to see. Columns marked with a blue checkmark will show, ones that are not marked will not show

🖽 Grid 🗯 Scheduler				Curr	ent Month 🔻	New Reservation Memo	Save View	Reset V	/iew
X Excel									
Drag a column header and dro	p it here to group by that colur	nn							
OR Case : Surgery	: Patient	:	Physician	1	Procedure		1	Locatio	n
↑ Sort Ascend ↓ Sort Descer	ling	T		•	ABDOMINOPLAS	STY	¥ ¥		
Columns	Case								¢
Y Filter	Surgery Date	2							•
	Patient						1-1	of 1 items	C
	Physician								
	Procedure								
	Location								
	Status								
	Account Nur	mber							
	Medical Reco	ord							
	Need Implan	nt							
	□Implant								
	Admission Ty	ype							
	Primary Insu	rance Nam	e						
	Processed								
	Quote Amou	unt							
	Expected Rev	venue							
	□Insurance Re	evenue							

### Filtering

On any column of the grid, to use the filtering, search for a keyword and click to filter

st				×	T	N.					
EST DOC	•										
OR Case	Surgery Date	Patient †		Physician					Procedure		Location
OR Case	Surgery Date	Patient †	T	Physician TEST DOC			×	<i>"</i> (	Procedure	Ŧ	Location
OR Case	Surgery Date	Patient † 12312213dddd 123123131221dddd	Ŧ	Physician TEST DOC			×	Ϋ́	Procedure 23234234234234ddd	Ţ	Location
OR Case	Surgery Date	Patient † 12312213ddd 123123131221ddd TEST PATIENT1 TEST PATIENT1	T	Physician TEST DOC TEST DOC TEST DOC			×	T ř	Procedure 23234234234ddd TESTING PROCEDURE	Ţ	Location



# Sorting

Click on the tab you want to order, arrow pointing up orders from oldest date/a – z, arrow pointing down orders from newest date/z – a.

Surgery Date 👃	Surgery Date 🕇
<b>T</b>	<b>T</b>
6/1/2022	12/12/2017
5/27/2022	12/12/2017
5/26/2022	12/12/2017
5/26/2022	12/12/2017
5/26/2022	12/12/2017
5/26/2022	12/12/2017
5/26/2022	12/13/2017
5/26/2022	12/13/2017
5/26/2022	12/13/2017
5/26/2022	12/13/2017

### Export to Excel

After making changes, if you wish to export the information, you can do so by clicking the Excel button, which will create an Excel and download it.





# Surgery Details

To open the surgery details page, click on any row of the Surgeries Grid.

Excel							
ag a column h	eader and drop it h	ere to group by that column					
R Case	e Surgery Date Patient		Physician		Procedure		Location
T		TestUser Y		T		Т	
	6/15/2022	TestUser JuneSix	CORCES ARTURO		Test		
	6/15/2022	TestUser JuneSix	CORCES ARTURO		Test		
	6/15/2022	TestUser JuneSix	CORCES ARTURO		Test		

The surgery details window has several tabs such as Patient, Procedure, Insurance, Orders, Cost Analysis, and Files.

• PATIENT: Patient tab (shown below) have demographic information about the patient.

Reservation Memo Details			Back	Create Template	
PATIENT PROCEDURE INSU	RANCE ORDERS	COST ANALYS	SIS FILES CHA	NGES HISTORY	
Med Record:	Patient Acct:		OR Case:		
First Name:		Last Name:			
Sex:	Weight:	DOB:		SSN	ß
Address:	÷	City:	State:	ZIP:	
Home Phone: Work Phone:	Email:				
Primary Care Provider:		PCP Phone:	PCP Fax:		
Patient Info Notes					



• PROCEDURE: Procedure tab holds information related to the procedure done on the patient, and information such as the surgeon and diagnosis.

servatior	n Memo Detail	5					Back	Create Templat
PATIENT	PROCEDURE	INSURANCE	ORDERS	COST ANA	LYSIS	FILES	СН	ANGES HISTORY
Surgeon:		Sche	duled Date:		1	.ength (H	l:M):	
		4/1	7/2023 7:30 A	M	9	01:00		
Procedure	2							
KNEE AR	THROSCOPY							
Diagnosis								
CPT:				ICD10:				
Need imp	lant? Implant:							
NO								
Special Re	equests :							
								j.
Anesthesi	a:			Admission :				
Medical C	learance			Will PreOps I	pe per	formed a	t Larkin	
NO				NO				
Allergies								
Deskala	-							
rathology								
Procedure	Notos							
riocedure	notes							

• INSURANCE: Insurance tab holds information related to the patient's insurance

Reservation Memo Details		Back 🛛 🖓 Create Template
PATIENT PROCEDURE	INSURANCE ORDERS C	OST ANALYSIS FILES CHANGES HISTORY
Primary Insurance:	Policy ID:	Verif. Phone:
Secondary Insurance:	Policy ID:	Verif. Phone:
Insurance Notes		



• ORDERS: Order tabs show the labs and other tests ordered for the patient. Also de pre-ops medications

PATIENT     PROCEDURE     INSURANCE     ORDERS     COST ANALYSIS     FILES     CHANGES HISTORY       PRE-OPS TESTING ORDERS     PT     PT     T & S     T & C       CBC:     UA:     PT     PTT     T & S     T & C       CMP     HCG     SMA7     ESR     EKG     X-Rays       Other Tests:     PRE-OPS MEDICATIONS     PRE-OPS MEDICATIONS     PRE-OPS MEDICATIONS						
CBC:       UA:       PT       PTT       T & S       T & C         CMP       HCG       SMA7       ESR       EKG       X-Rays         Other Tests:       Image: Structure of the struct	PATIENT	PROCEDURE	INSURANCE	ORDERS COST AN	NALYSIS FILES	CHANGES HISTORY
CBC: UA: PT PTT T & S T & C CMP HCG SMA7 ESR EKG X-Rays Other Tests:  PRE-OPS MEDICATIONS	PRE-OPS	TESTING ORDER	ιs			
CMP HCG SMA7 ESR EKG X-Rays CMP Tests: PRE-OPS MEDICATIONS	CBC:	UA:	PT	PTT	T&S	T & C
CMP HCG SMA7 ESR EKG X-Rays Other Tests:  PRE-OPS MEDICATIONS						
Other Tests: PRE-OPS MEDICATIONS	CMP	HCG	SMA7	ESR	EKG	X-Rays
Other Tests: PRE-OPS MEDICATIONS						
PRE-OPS MEDICATIONS	Other Test	ts:				
	PRE-OPS	MEDICATIONS				



• Files – This tab shows al files associated with the surgery. In every step of the workflow, users can upload and see files.

In order to upload the file, click the "Select files" button to select it, or simply drag it to where it says" Drop files here to upload".

eservation	Memo Detail	S					Bad
PATIENT	PROCEDURE	INSURANCE	PRE-ORDERS	PRE-HOLDING	COST ANALYSIS	FILES	
File nam	e						
Uploa	d files						
Selec	ct files					Drop files here to upload	

PATIENT PROCEDURE INSURANCE ORDERS COST ANALYSIS FILES File name Upload files Select files... Drop files here to upload Surgery Scheduler - Help (4).docx 454.99 K8 × Surgery Scheduler - Help (3).docx Ē × 454.99 KB Clear

You can also see previously uploaded files in this tab. To download them, just click over the file.

To delete a previously uploaded file, just click on the X to the right.



• CHANGES HISTORY: Shows changes made to reservation memo from it's creation to current date, if no changes have been made, "No Records Available" will show instead.

servation	Memo	Details	5					E	Back	Create Templat
PATIENT	PROCE	DURE	INSU	IRANCE	ORDERS	COST AN	ALYSIS	FILES	CH.	ANGES HISTORY
Date		Execut	ed By			Function	Action	n		Value
					No recor	ds available.				
н н	0 ►		10	• i	tems per pag	ge		No	o item	s to display 💍



### Create a new Reservation Memo

To create a new Surgery Reservation memo, click the button at the top right of the Surgeries Scheduler grid.

III Grid 🎬	Scheduler				📋 New R	eservation Mem
X Excel						
rag a column h	eader and drop it h	ere to group by that column				
Drag a column h DR Case	eader and drop it f	Patient	Physician	Procedure	Location	Status

The New Reservation Memo form appears with the information displayed between sections.

### Patient Information

This part of the form contains important information about the patient demographics.

First Name:*			Last Name:*			
Sex:		Weight: DOB:*			SSN	
Male 🔘 🛛 Fema	le 🔿	0.00	\$	6		
Address:*			City:	State:	ZIP:*	
				•		
Home Phone:*	Work Phone:	Email:				
Primary Care Provi	der:		PCP Phone:	PCP Fax:		

### Procedure Information

Select the Surgeon name, scheduled date, procedure, diagnosis and whether the patient needs an implant.

To pick the surgeon, click the arrow under Surgeon and select the surgeon that is related to the procedure.

Surgeon:	
CORCES ARTURO	• M
CORCES ARTURO	<

To pick the Scheduled date of the procedure, click the Calendar Icon to select the date of the procedure, and the Clock icon to select the time of the procedure.



Sched	duled	Date:	•				Length (H:M):	Scheduled Date:*		Le
1						R	<b>(</b> ) 01:00		<b>1</b> 0	1
•		М	ay 20	22		•			2 ht	1
SU	MO	ΤU	WE	TH	FR	SA		12:00 AM	$\sim$	
1	2	3	4	5	6	7		12:30 AM		
8	9	10	11	12	13	14		1:00 AM	-	_
15	16	17	18	19	20	21		- 4 20 414	-	_
22	23	24	25	26	27	28		1:30 AM		
29	30	31	1	2	3	4		2:00 AM		
5	6	7	8	9	10	11		— 2:30 AM	-	_
	Thu	rsday	, May	26, 2	022			— 3:00 AM	÷	

he Procedure field is requ	uired.		
Diagnosis:*			
The Diagnosis field is requ	vired.		
CPT:		ICD10:	
No NO	Implant:		
Special Requests :			
hasthasia			Anos Other
Anesthesia: General MAC	V Regional Local	Other O	Anes. Other
Anesthesia: General MAC Admission :	UV Regional Local	Other O	Anes. Other
Anesthesia: General MAC Admission : Inpatient Admit	UV Regional Local	Other AM. Admit	Anes. Other
Anesthesia: General MAC Admission : Inpatient Admit Wedical Clearance No	V Regional Local	Other AM. Admit	Anes. Other
Anesthesia: General MAC Admission : Inpatient Admit Medical Clearance No Pathology:	UV Regional Local	Other AM. Admit	Anes. Other

If patient needs an implant, click the slider for "Need implant?", and input the name of the implant to the left of the slider.



### Insurance Information

Enter the Insurance information for the patient.



#### INSURANCE INFORMATION

Primary Insurance:*	Policy ID:*	Verif. Phone:	
Secondary Insurance:	Policy ID:	Verif. Phone:	
Insurance Notes			
			1,

### Pre-Orders

Select the labs needed for the patient. In case any lab or test is not represented in the selection, type the information in the "Other Tests" box.

CBC:	UA:	PT	PTT	T&S	T&C
CMP	HCG	SMA7	ESR	EKG	X-Rays
Other Tests:					

### **Pre-Ops Medications**

#### Enter the medications needed for the patient in the text box

olding:		
	Template	

You can use the "Template" button to select commonly used medications (entered previously).



Pre Orders Templates	
Select all	
ANCEF 2gm IVBP	N
NULLGENTAMYCIN 80 mg IVBP	5
NULLTRANEXAMIC ACID 1000mg IV	
CLEOCIN 600mg IVPB	
	Close Add
PT PTT	T&S

Through this pop-up window, user can select medications to be included in the Pre-Orders section.

Click add button after selecting the medications from the template. The list of medications will be copied to the main form.

Once all information have been filled into the form , click on Submit button at the bottom of the page.



The new Reservation Memo will be shown in the main surgeries grid. It will have the "DRAFT" status.



### Surgeon Approval

Surgeons must approve the Reservation Memos. To do this they must first login with their user account, go to the Surgeries tab, click on the RM that they wish to approve, and then click on the approve button in the toolbar. The signature used by the surgeon will be attached to the RM, **without a signature the RM cannot be approved.** The last signature used by the surgeon will be the one associated with the RM when it is approved.

NUNITY SUP	gery Scheduler	Home Surgeries	Hello AppTestingUser8@larkinhospital.com
Reservation N	Memo Details		APPROVE Edit 🖶 Back
PATIENT	PROCEDURE INSU	IRANCE ORDERS FILES	

After clicking "Approve", a window will pop up to confirm your decision.

	Patient Acct:			OR Case:	
	Are you sure?				
	The Reservation M and no further cha	emo will be ap nges will be al	oproved lowed.		
		Cancel	Approv	/e e:	
Work Phone:	Email:				

After "Approve" button is clicked, a confirmation window will show up showing that the RM is now "Approved"





After this process the reservation memo will go to "Surgeon Approved" status and is ready for submission to the OR team.

III Grid	<b>*</b>	Schedule						É	New Reservation Memo
Exce	el								
Drag a coli	umn he	eader and (	drop <mark>i</mark> t h	ere to group by that column					
OR Case		Surgery	Da	Patient	Physician	Procedure	Locati	on	Status
	Ŧ		T	T	T	T		T	5 × • • •
									Surgeon_Approved
_									Surgeon_Approved
н н	Ť.	Þ. H	10	Items per page					1 - 2 of 2 items



### Reservation Memo Submission

Once the RM is approved by the physician, its ready to be submitted to the OR scheduling team. In Surgery details page, a "SUBMIT" button will appear on the toolbar (it will show a window asking for confirmation)

KIN UNITY Surgery Sch	eduler Home Surgeries	Hello AppTestingUser8@larkinhospital.co
Reservation Memo Deta	ils	Submit Edit 🖶 Bac
PATIENT PROCEDURE	INSURANCE ORDERS FILES	
Med Record:	Patient Acct:	OR Case:
	- Tota	
	Are you sure?	
	The Reservation Memo will	
	to the OR Team.	be submitted
		ancel Submit 2
	Last	Name:
	Reservation Memo su	bmitted! ×
	The Reservation Memo have	e been submitted.
		ОК

Submitting a RM will send an email notification to the OR scheduling team members.

After the RM is submitted, it can only be cancelled or re-scheduled, which can be done in the RM details page, with the buttons that will show up in the toolbar.



Reservation	Memo Details	5			Edit 🖨	Back	Cancel Surgery	Re-schedule Surgery
PATIENT	PROCEDURE	INSURANCE	ORDERS	FILES				Q
Med Reco	rd:		Patient Acct:			OR	Case:	



# Edit Reservation Memo

To edit a reservation memo, it must in the "Draft" or "Surgeon Approved" status on the Surgeries Scheduler grid.

III Gri	d 🎬	Schedule							Ô	New R	eservatio	n Merr	10
x Ex	cel												
Drag a c	olumn h	eader and	drop it h	ere to group by that column									
OR Cas	ie	Surgery	Da	Patient		Physician	Procedure		Location		Status		
	T		T		T	T		T		T	•	T	
		6/8/202	2	TESTING TESTING		CORCES ARTURO	testing				Draft		

After clicking on the reservation you wish to edit, a Details page will open. Then click "Edit" at the top right of the details page, if you wish to return to the grid, click "Back".

CEDURE	INSURANCE	PRE-ORDERS	PRE-HOLDING	FILES		
		Patient Acct:			OR Case:	
	CEDURE	CEDURE INSURANCE	CEDURE INSURANCE PRE-ORDERS Patient Acct:	CEDURE INSURANCE PRE-ORDERS PRE-HOLDING Patient Acct:	CEDURE INSURANCE PRE-ORDERS PRE-HOLDING FILES Patient Acct:	CEDURE INSURANCE PRE-ORDERS PRE-HOLDING FILES Patient Acct: OR Case:

### Delete Reservation Memo

Reservation Memos can only be deleted where they are in **DRAFT** status. To do the deletion, just click on "X" button that appears to the right of the reservation in the surgeries grid.



### Cancel Surgery

To cancel a scheduled surgery, click over it on the main surgeries grid. Once in the Details page, click the "Cancel Surgery" button.

LARKIN COMMUNITY HOSPITAL	ery Schedul	er - OR Team	<b>1</b> Home	Surgerie	s Hello	AppTestingUser1@la	rkinhospital.com!	Logout
	Reservation	Memo Details	Edit 🖶	Back	Cancel Surgery	Re-schedule Surgery		
	PATIENT	PROCEDURE	INSURANCE	ORDERS	FILES			
	Med Record	d:	Patient Acct:		OR Case: 221/606	1902		

### A confirmation popup windows appears

	Are you sure?	
ac	A surgery cancellation request will be sent to the OR team.	la
no	Cancel Submit	

Click "Submit" and the OR scheduler team will receive a notification requesting to cancel the surgery.

Another confirmation popup window appears, showing that the request was sent.





The surgery will now appear with an orange background color and with the status "PENDING CANCEL".

III Grid 🏙	Scheduler					đ	New Reservatio	n Memo
Excel								
Drag a column h	eader and <mark>d</mark> rop it h	ere to group by that column						
OR Case	Surgery Da	Patient	Physician	Procedure		Location	Status	
i <b>T</b>	T	T	T	•	Ŧ	T	• •	
22174065243	6/24/2022		WOLF AIZIK MD	CRANIOTOMY FOR TUMOR		LCH OR2	Pending Cancel	)
22172065206	6/22/2022	ADANIVIA ECHEVERRIA	WOLF AIZIK MD	VENTRICULOPERITONEAL SHUNT		LCH OR2	Pending Review Quote	
н н 1	▶ <b>H</b> 10	<ul> <li>items per page</li> </ul>					1 - 2 of 2 it	ems 🔿

After the OR scheduler team receives the email notification, they will proceed to cancel the surgery on the EMR system.

A notification will be sent to the user's email acknowledging that the surgery has been cancelled by the OR team and the surgery will change status to CANCELLED.

### Creating New Memo from Cancelled Surgery

After opening RM details for a cancelled surgery, click the calendar button on the toolbar of the RM details form.

Reservation	Memo Details	5				ä	Back	Create Template
PATIENT	PROCEDURE	INSURANCE	ORDERS	FILES	CHANGES HISTORY			
Med Reco	rd:		Patient Acct:		OR	Case:		

This will use the same information that the cancelled surgery had previously, and allow for new edits and changes.



# Create Template

Clicking "Create Template" will save the information from the Procedure Information that was set up in the new reservation memo for future use. To use this feature, after completing the New Reservation Memo form, click "Create Template"

leservation Memo Details	Cancel Surgery	Cancel Surgery Re-schedule Surgery		₽	Back	Create Template
PATIENT PROCEDURE INSURANCE	ORDERS FILES	5 CHANGES HISTORY				
Med Record:	Patient Acct:		OR Case	21		
First Name:		Last Name:				
BORDEN		GARCIA				



### Re-Schedule

To Re-schedule a surgery, click the "Re-Schedule Surgery" button in the surgery details page.

LARKIN COMMUNITY HOSPITAL	ery Schedu	ıler - OR Tear	n Home	Surgerie	is Hello A	AppTestingUser1@lark	inhospital.com!	Logout
	Reservation	I Memo Details	Edit 🔒	Back	Cancel Surgery	Re-schedule Surgery		
	PATIENT	PROCEDURE	INSURANCE	ORDERS	FILES			
	Med Reco	rd:	Patient Acct:		OR Case:	0/0		

The following window will pop up, there the user will select the new surgery date, time, and length. Click "Save Changes" to submit the new values selected.

Surgery Date	
07/06/2022 05:01 PM	
Surgery Length (hours)	
Surgery Length	

Popup window will appear confirming that your request has been sent to reschedule the surgery.



An email requesting the reschedule changes will be sent to the OR scheduler team.



The surgery will now appear with an orange background color and with the status "PENDING Re-Schedule".

III Grid 🗎	Scheduler								🛔 New Reservation N	Vemo
Excel										
Drag a column h	leader and drop it I	nere to group by that colum	n							
OR Case	Surgery Da	Patient		Physician		Procedure	Loc	ati	Status	
<b>T</b>	T .		T		T	T		T		•
	7/29/2022 <b>HurtEnngage</b>		WOLF AIZIK MD		Microvascular Decompression of the trigeminal nerve on the left			Submitted		
	7/13/2022	-		WOLF AIZIK MD		Left temporal craniotomy, resection of tumor			Pending Re-schedule	

After the OR scheduler team receives the email notification, they will proceed to reschedule the surgery on the EMR system.

A notification will be sent to the user's email acknowledging that the surgery has been scheduled for the new date by the OR team and the surgery will change status to SCHEDULED.

### Print Reservation Memo

Users can generate a summary view of the Reservation Memo, in order to print it or saved it to disk.

In the Details page, a printer icon should appear on the toolbar.

LARKIN COMMUNITY HOSPITAL	ıler - OR Tear	n Home	e Surg	eries Hello	Hello AppTestingUser1@larkinho		
Reservation	n Memo Details	•	Back	Cancel Surgery	Re-schedule Surgery		
PATIENT	PROCEDURE	INSURANCE	ORDE	RS FILES			
Med Reco	rd:	Patient Acct		OR Case:			
397722		986576		221820	65359		



Once the user clicks on the icon, a PDF file is created and downloaded to the user's browser.

eservation Date: 6/21/2 Admission : AM A	2022 Submitted by: dmit Anesthesia:	General		_	Surgery	Date : 7	6/2022	Surger	y Time: 3:00 PM
PATIENT INFORMAT	TION								
Name:		Sex:	Female	DOB:	2/7/1946	Age	d.	SSN:	
Address:	-		City: F	ort Laude	erdale	State:	FL	ZIP	33312
Home Phone:	Work Pho	ne: 🚥		Em	ail:				
PCP : Dr. Fernando C @ La Colonia Notes :	Gonzalez Vergara Po	CP Phone	: 95439	19192	PCP Fa	ix :			
PROCEDURE INFOR	RMATION								
Surgeon : WOLF AIZI	KMD	CPT :	62223-62			ICD	10: G91.2	Ŋ	
Surgeon : WOLF AIZI Procedure : Placemer	K MD	CPT :	62223-62 unt with a \$	Sophysa (	programma	ICD	10: G91.2 , set at 200	) mm H20	5
Surgeon : WOLF AIZI Procedure : Placemer Diagnosis : Normal P	K MD nt of a right ventriculoper ressure Hydrocephalus	CPT :	62223-62 unt with a \$	Sophysa (	programma	ICD ible valve	10 : G91.2 , set at 200 Medical Cle	mm H20 sarance :	D No
Surgeon : WOLF AIZI Procedure : Placemer Diagnosis : Normal P Implant : Sophysa	K MD nt of a right ventriculoper ressure Hydrocephalus Programmable shunt val	CPT : itoneal shi	62223-62 unt with a \$	Sophysa (	programma	ICD ble valve	10 : G91.2 , set at 200 Medical Cle	) mm H20 sarance :	D No
Surgeon : WOLF AIZI Procedure : Placemer Diagnosis : Normal P Implant : Sophysa Special Requests:	K MD nt of a right ventriculoper ressure Hydrocephalus Programmable shunt val	CPT : itoneal shi	62223-62 unt with a \$	Sophysa (	programma	ICD ble valve	10 : G91.2 , set at 200 Medical Cle	mm H20	D No
Surgeon : WOLF AIZI Procedure : Placemer Diagnosis : Normal P Implant : Sophysa Special Requests: Dr. Eddie Gomez to ass	K MD nt of a right ventriculoper ressure Hydrocephalus Programmable shunt va ist	CPT : itoneal shi	62223-62 unt with a \$	Sophysa (	programma	ICD ble valve -	10 : G91.2 , set al 200 Medical Cle	) mm H20 sarance :	No
Surgeon : WOLF AIZI Procedure : Placemer Diagnosis : Normal P Implant : Sophysa Special Requests: Dr. Eddie Gomez to ass Pathology :	K MD nt of a right ventriculoper ressure Hydrocephalus Programmable shunt val ist	CPT : itoneal shi	62223-62 unt with a 5	Sophysa p	programma	ICD ble valve	10 : G91 2 , set at 200 Medical Cle	) mm H20	No
Surgeon : WOLF AIZI Procedure : Placemer Diagnosis : Normal P Implant : Sophysa Special Requests: Dr. Eddle Gomez to ass Pathology : Notes :	K MD nt of a right ventriculoper ressure Hydrocephalus Programmable shunt val ist	CPT : itoneal shi	62223-62	Sophysa p	programma	ICD ble valve	10 : G91 2	omm H20	No
Surgeon : WOLF AIZI Procedure : Placemer Diagnosis : Normal P Implant : Sophysa Special Requests: Dr. Eddie Gomez to ass Pathology : Notes : PCP will do medical clear	K MD nt of a right ventriculoper ressure Hydrocephalus Programmable shunt val ist	CPT :	62223-62 unt with a S	Sophysa p	programma	ICD ble valve	10 : G91.2 , set at 200 Medical Cle	e mm H20	D No
Surgeon : WOLF AIZI Procedure : Placemer Diagnosis : Normal P Implant : Sophysa Special Requests: Dr. Eddle Gomez to ass Pathology : Notes : PCP will do medical clear INSURANCE INFORM	K MD nt of a right ventriculoper ressure Hydrocephalus Programmable shunt val ist arance. MATION	CPT : itoneal shi	62223-62 ant with a S	Sophysa p	programma	ICD ble valve	10 : G91 2	earance :	No
Surgeon : WOLF AIZI Procedure : Placemer Diagnosis : Normal P Implant : Sophysa Special Requests: Dr. Eddie Gomez to ass Pathology : Notes : PCP will do medical clear INSURANCE INFORI Primary Insurance :	K MD It of a right ventriculoper ressure Hydrocephalus Programmable shunt val ist arance. MATION HealthSun	CPT : itoneal shi	62223-62 unt with a S	Sophysa p	programma	ICD ble valve	10 : G91 2 , set at 200 Medical Cle	earance :	D No



### Surgery status

**DRAFT**: The new surgery request (Reservation Memo - RM) is created at the medical office with all the initial data (patient demographic, surgical procedure, and insurance information, etc.). In this status, the RM is only visible to the surgeon and the medical office personnel, not to the OR scheduler team.

SURGEON APPROVED: The RM is reviewed and approved by the surgeon

**SUBMITTED**: RM is submitted to the OR scheduling team. They received an email notification with the RM link inside, where they can visualize it on the app.

**SCHEDULED**: Surgery is scheduled in OR EMR system (PIMMS), and its already synchronized with Surgery Scheduler app.

STARTED, FINISHED: Surgery status in real time (from the synchronization with PIMMS)

DISCHARGED: Patient is discharged (from the surgery room)

**PENDING CANCEL**: Medical office have requested a cancellation for the surgery. OR Team receives an email notification with the request.

**PENDING RESCHEDULE**: Medical office have requested a reschedule for the surgery. OR Team receives an email notification with the request.

**CANCELLED**: Surgery have been cancelled in the OR EMR system, and it's synchronized with the Surgery Scheduler App.

**PENDING REVIEW QUOTE**: Surgery already submitted have a surgical implant that needs to be quoted and purchased by the hospital if the implant cost exceeds the threshold (default \$1000.00). OR Team should enter the implant cost into the surgery cost analysis section. This step notifies the Medical Records users and change the RM status to PENDING REVIEW PROCEDURE.

**PENDING REVIEW PROCEDURE**: Medical Records personnel needs to enter at the surgery cost analysis section, the expected revenue value for the surgical procedure. This step notifies the Contract Management users and change the RM status to PENDING REVIEW CONTRACT.

**PENDING REVIEW CONTRACT**: Contract management personnel needs to enter at the surgery cost analysis section, the expected revenue value for the surgical procedure, for the insurance plan associated with the patient. This step notifies the Executive users and change the RM status to PENDING REVIEW EXECUTIVE.

**PENDING REVIEW EXECUTIVE**: Executive users review the surgery request and **approve** or **deny** the surgery, based on the total procedure cost and the expected revenue, based on the information entered by the other users in the former steps. If the surgery its approved, it changes status to SCHEDULED and if it denied it change status to DENIED. In both cases the medical office and OR team will receive a notification with the result of the decision.

**DENIED**: The surgery procedure has been denied by the hospital. Medical office will receive a notification.



# RM Templates

The RM Templates dashboard will show all previously created Templates and allows users to create new Templates.

					New Template
Drag a column header and	d drop it here to gro	oup by that column			
Created At \downarrow	Name	Physician	Procedure	Actions	
	T	T	T		
02/10/2023 08:51 PM	HYDROCE		HYDROCELECTOMY RIGHT OR LEFT /POSSIBLE PARTIAL SCROTECTOMY AND ANY OTHER INDICATED PROCEDURES	6 4	To RM
02/08/2023 04:24 PM	INFLATABLE PENILE IMPLANT (IPP)		INFLATABLE PENILE IMPLANT (IPP) AND ANY OTHER INDICATED PROCEDURES	C &	To RM
01/30/2023 04:14 PM	MPP		MALLEABLE PENILE IMPLANT AND ANY OTHER INDICATED PROCEDURES	6	To RM
01/19/2023 09:11 PM	TURP		TRANSURETHRAL RESECTION OF THE PROSTATE (TURP) POSSIBLE LITHOLAPAXY AND ANY OTHER INDICATED PROCEDURES	C Q	To RM
01/13/2023 02:46 PM	HERNIA REPAIR		HERNIA REPAIR LEFT OR RIGHT INGUINAL OR UMBILICAL	6	To RM
н н 1 н н	10 <b>v</b> item	s per page			1 - 5 of 5 items 💍

To create a new template, click the button "New Template".

								New Template
Drag a column hea	der ar	nd drop it I	nere to gro	oup by that column				
Created At 👃		Name		Physician	Procedure		Actions	
Ċ.	۲		T	T		T		

Fill out the form and click "Add" at the bottom of the form.

#### PRE-OPS MEDICATIONS

Pre Holding:

		Template
	1,	
Add		



# Edit Templates

To edit Templates click the Edit button in the Actions tab.

					New Template
Drag a column header and	l drop it here to gro	up by that column			
Created At 👃	Name	Physician	Procedure	Actions	
<b>T</b>	Ŧ	T	T		
02/10/2023 08:51 PM	HYDROCE		HYDROCELECTOMY RIGHT OR LEFT /POSSIBLE PARTIAL SCROTECTOMY AND ANY OTHER INDICATED PROCEDURES	6	To RM
	100000000000000000000000000000000000000				

To return back to the RM Templates dashboard, click "Cancel" at the top of the form.

To save the edited changes, click "Save" at the bottom of the Template form.

# **Remove Templates**

To remove Templates click the Edit button in the Actions tab.

						New Template
Drag a column heade	r and i	drop it here to gro	up by that column			
Created At 👃		Name	Physician	Procedure	Actions	
	Ŧ	T	T	T		
02/10/2023 08:51 PN	А	HYDROCE		HYDROCELECTOMY RIGHT OR LEFT /POSSIBLE PARTIAL SCROTECTOMY AND ANY OTHER INDICATED PROCEDURES	6	To RM

# Using Templates

To use the Templates for a New Reservation Memo, click the "To RM" button.

					New Template
Drag a column header and drop it here to group by that column					
Created At 👃	Name	Physician	Procedure	Actions	
	<b>T</b>	T	Т		
02/10/2023 08:51 PM	HYDROCE		HYDROCELECTOMY RIGHT OR LEFT /POSSIBLE PARTIAL SCROTECTOMY AND ANY OTHER INDICATED PROCEDURES	2	To RM

This will open a new reservation memo form, which will have the procedure information from the RM Template that was previously set up.