OpTime - Hard Stop Appeal Process

Intended Audience: Ambulatory Schedulers

What's in it for me? The (SOC) Surgical Optimization Center helps patients prepare for their upcoming surgery, improving the patient's health by decreasing their risk of complications during and after surgery. Once the Ambulatory scheduler opens a case a specialty SOC physician reviews the patients' health status and personal needs to identify any issues that might affect their surgery and recovery working to resolve them prior to surgery.

Office Staff (Case Entry Workflow)

Use the **Open Case** activity to record information about the surgical case.

- Click 🔳 **Open Case** on the main toolbar
- Enter the patient's name, the location, surgeon from the case request, and the start date.
- Click **New Case**

Case Entry

Stop/Yield signs

- Required pieces of information

Complete the following information:

- Patient Class
- Requested date and time
- Procedure/ Pre-op diagnosis
- Surgeon
- Location
- Case Classification
- Procedure/code
- Laterality (if needed)

Questions Section

Ready to Schedule

- Select **No** – if the case is not ready to schedule, still missing key elements
- Select **Yes** – if case is ready for scheduling
- Select **No, Currently Optimizing Patient**
- Select **No, Awaiting SOC Review** (Hard Stop Appeal)

	Must send a Case Message to In Basket pool "Hard Stop Appeal SOC Physician review" to notify them that the Case is ready for their review.

SOC Review/Comments

Use a SmartPharse

SmartPhrases allow you to type a few characters that automatically expand to a longer phrase or paragraph.

1. In a SmartTool-enabled field, enter a period (.) followed by the SmartPhrase's name (". SOCAPPEAL"). As you type, a list of matching SmartPhrases and SmartLinks appears.
2. Complete any SmartLinks and wildcards (***) in the SmartPhrase.
3. Click ☆ to mark links and phrases as favorites.
4. **.me** enters your full name

	A wildcard (***) is a placeholder. Type over a wildcard with the text you want to add or delete it. Press **F2** to jump to the next wildcard

In the notes field type (". SOCAPPEAL")

Complete SmartPhrase details

Send Case-Specific In-Basket (IB) Messages

Case Msg allows you to send case specific In Basket messages during case entry. The case and patient information are automatically included in the message so the recipient can quickly identify which procedure the sender is referencing in the message. The message will be sent to a pool which serves as an In Basket mailing list that contains a group of Epic users. When a user sends a message to a pool, the message is available for all members of the pool to see, and any member can act on it.

- On the Case Entry Toolbar click **Case Msg** to generate the Case Message
- In the TO Field: enter **P Hard Stop Appeal SOC Physician Review**
- Subject: **SOC Physician Review**
- Case Action: N/A
- Body of message: A brief description of your request
- Click **Send** to route the message to the SOC physician.

In Basket Case Messages
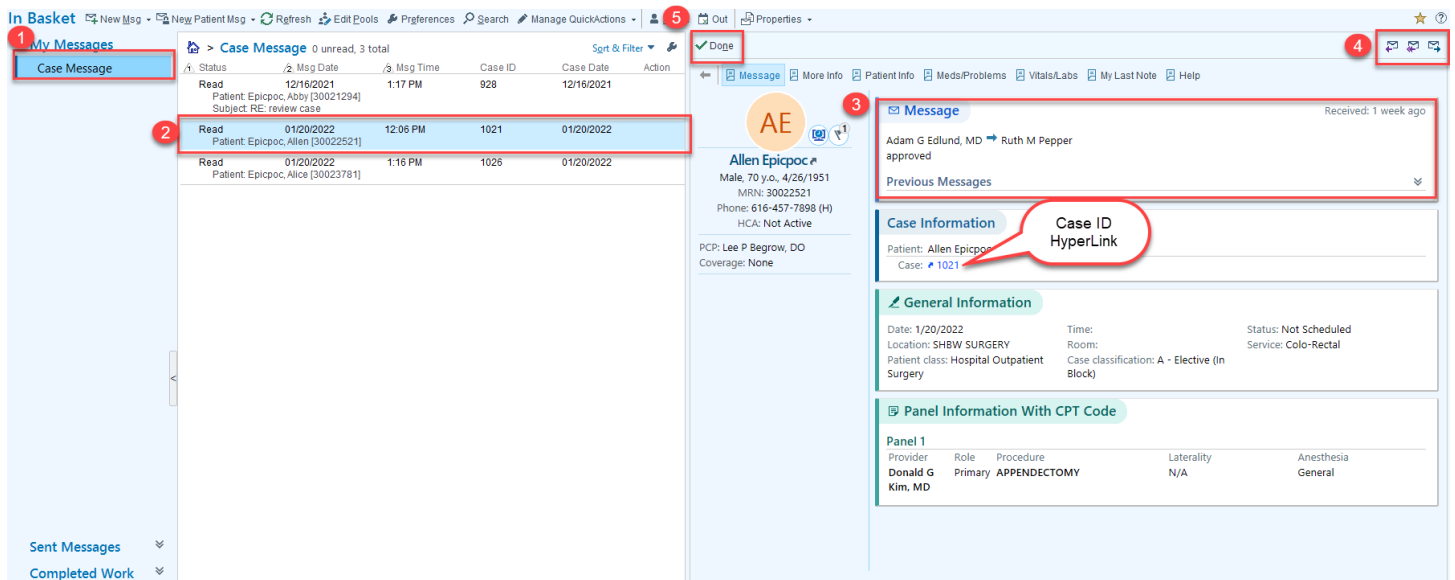
In Basket is a secure, closed, task-based messaging system that allows users to:

- Send and receive messages about patient care
- Complete tasks related to case-specific messages

Open your In Basket 📧

1. Click **Case Message** in the My Messages folder
2. Select your patient
3. Review message for approval or denial
4. Reply, Reply to all, Forward Message
5. After the message is sent click **Done** to complete with message

Approval and Denial Workflow

SOC Physician approves

- Select **Yes** Ready to Schedule

SOC Physician Denies Case

- Follow standard work cancel case through Case Action and resubmit later. The Case ID number cannot be resubmitted.
- Must be canceled and not maintained in a "no status".
- Upon case optimization a new case request must be created.