




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 SmartPhrase

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

Questions

Ready to Schedule? No Yes No, Currently Optimizing Patient

No, Awaiting SOC Review

SOC Approval Status: SOC Physician - Approved SOC Physician - Denied

SOC Review/Comments (use SmartPhrase .SOCAPPEAL -->):

Today's Date: 1/26/2022

Name: April Epicpoc DOB: 2/28/1981 MRN: 30021352

Surgeon's Contact Info:
Donald G Kim, MD
Phone Number: 616-267-7100

Estimated Date of Surgery: ***
* No procedures listed *

Reason for Appeal (Please include any documentation to demonstrate the patient's attempt(s) to meet the hard stop criteria:

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.

Case Entry Summary Demographics Case Entry **Case Message**

Case Message

High Low

Flags

Dates

+ PCP

To: P Hard Stop Appeal SOC Physician Review x Cc

SOC physicaain review

Case ID Case Action

1088

EPICPOC, APRIL "LIZ" [30021352]

Insert SmartText

100%

Please review case|

Send Cancel

In Basket Case Messages

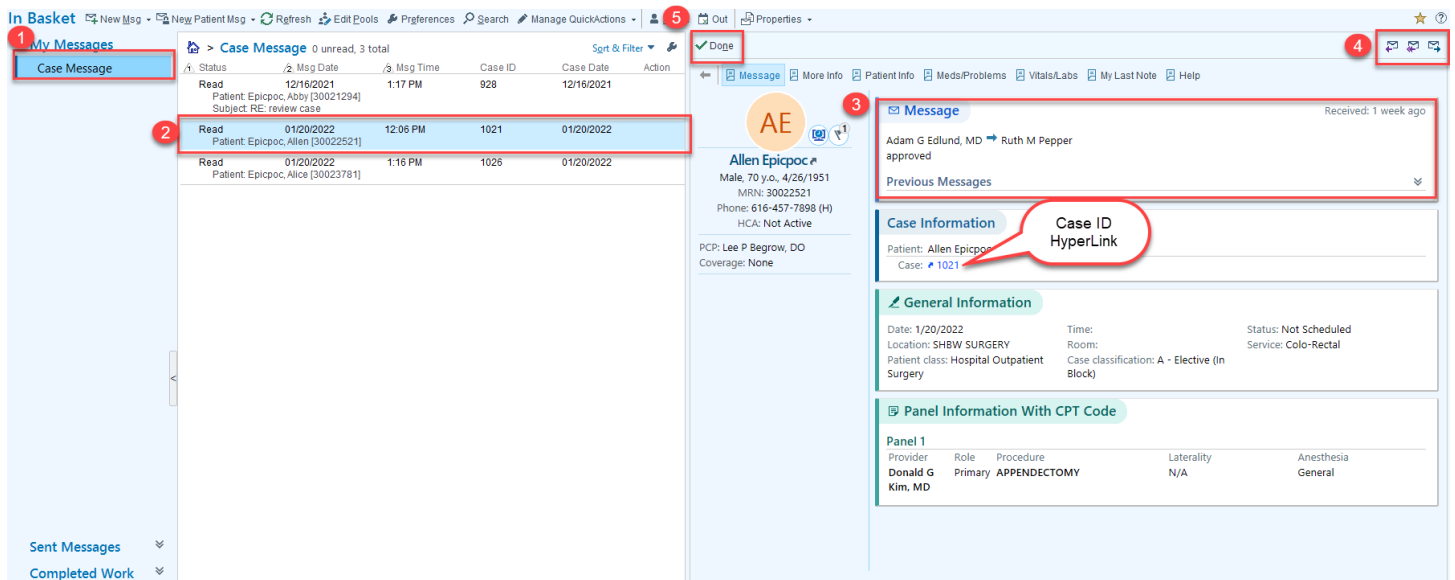
In Basket is a secure, closed, task-based messaging system that allows users to:

Spectrum Health Policy: [Creating Sharing Maintaining, and Storing Epic Related Training Materials](#) © 2020 Epic Systems Corporation
Epic Education 2.20.2023

- 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



The screenshot displays the Epic In Basket interface. On the left, the 'My Messages' folder is expanded to show 'Case Message'. A table lists three messages with columns for Status, Msg Date, Msg Time, Case ID, and Case Date. The second message is selected. The main area shows the details of this message, including the patient's name (Allen Epicpoc), MRN (30022521), and a 'Case ID HyperLink' (1021). The message content shows an approval from Adam G Edlund, MD to Ruth M Pepper. Below the message, there are sections for 'Case Information', 'General Information', and 'Panel Information With CPT Code'.

Status	Msg Date	Msg Time	Case ID	Case Date	Action
Read	12/16/2021	1:17 PM	928	12/16/2021	
Read	01/20/2022	12:06 PM	1021	01/20/2022	
Read	01/20/2022	1:16 PM	1026	01/20/2022	

Provider	Role	Procedure	Laterality	Anesthesia
Donald G Kim, MD	Primary	APPENDECTOMY	N/A	General

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.