



## Future State: Perioperative - Case Cancellation

Cerner Workflow ID: 6272 (v. 14.0) Client Workflow ID: 1090

Last updated by Anjanette Balboa, Mar 14, 2025 11:29am (UTC -4 hours)

**Workflow Details:**

Workflow Name: Perioperative - Case Cancellation

Workflow State: Future State

Workstream: Other

Venue: Perioperative

Client Owner: Boichuk (Doan), Kristen Rachel

Cerner Owner: Chariton,Caitlin M

Standard: Yes

Related Workflow(s):

Tags:

**Workflow Summary:**

Service Line: Anesthesiology

Related Solution(s): Ambulatory Surgery Center

Anesthesia Management

Surgical Management

Project Name: Niagara Health System:OPT-0297674:NIAG\_CD Niagara HIS RFP

TestBuilder Script(s):

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Workflow Notes: This workflow outlines the steps that should be taken upon cancelling a Perioperative case, based on when in the workflow the cancellation occurs. This does not include procedures that were attempted and unable to be completed.

For additional details on what should be documented, refer to the recommended practices in the Design Perioperative Nursing Reference Page: <https://wiki.ucern.com/x/SKoK>

Introduced By: WS 7

Validated By: WS 8

**Swim Lane:**

Role(s): Surgeon

Proceduralist

Surgeon's Office [Custom]

Department(s):

Security Position(s):

**Start/Stop [8]**

Description: Case requires cancellation per Surgeon/ Proceduralist (prior to day of procedure)

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**Work Step** [435]

Description: Provider to place cancellation in ATC for scheduler to pick up

Comments: If past 12 pm day prior to procedure - please call appropriate department to verify cancellation per policy

**Swim Lane:**

Role(s): Surgical Scheduler [Custom]

Department(s):

Security Position(s): Perioperative - Scheduler

**Work Step** [11]

Description: Cancel appointment from within the Appointment Book

Method: Scheduling Appointment Book

**System** [225]

Description: Case displays as Cancelled in Scheduling, Case Selection, and Perioperative Tracking

Method: PowerChart

Comments: The Perioperative Tracking display will update initially, typically for 30 minutes, before dropping off the view.

**System** [438]

Description: Cancellation flows to update ATC

Method: Novari ATC

**Swim Lane:**

Role(s): Day Surgery Nurse [Custom]

PARR Nurse [Custom]

Endoscopy Nurse [Custom]

APU Nurse [Custom]

Department(s):

Security Position(s): Perioperative - Nurse

**Decision** [235]

Description: Case requires cancellation per Surgeon/ Proceduralist/ Anesthesia (on day of procedure in Pre Procedure Department)

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**Work Step [34]**

Description: Notify the appropriate Procedural Nurse or Clerk (Endo/APU) to cancel the case

Method: Scheduling Appointment Book

**Work Step [14]**

Description: Complete documentation of any nursing care provided and sign form(s). Pull the Case Cancelled segment in the Pre Procedure Record

Method: PowerForm or IView

Comments: Document the reason for case cancellation in the Case Cancelled segment. This sends cancellation message to Novari

**Work Step [422]**

Description: Notify Bed Monitor if planned admission

**System [423]**

Description: Case displays as Cancelled in Scheduling, Case Selection, and Perioperative Tracking

**Swim Lane:**

Role(s): Anesthesiologist

Department(s):

Security Position(s): Physician - Anesthesiology  
Physician - Anesthesiology Resident  
Perioperative - CRNA  
Perioperative - CRNA Independent

**Decision [250]**

Description: Has the Anesthesia Record been opened?

**Decision [253]**

Description: Has any care been provided to the patient, outside of the Preanesthesia Evaluation?

Comments: i.e. Has the patient entered the OR, have they received a block in preop, etc.

**Work Step [58]**

Description: Complete documentation of care provided and finalize the anesthesia record

Method: Anesthesia Module

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**Work Step [255]**

Description: Contact IT department to have the Anesthesia Record dissociated from record and then deleted

Comments: Job responsibility unknown

**Decision [257]**

Description: Has anesthesia started the Pre-Anesthesia evaluation for the patient?

**Work Step [46]**

Description: Complete documentation of the Preadesthesia Evaluation, including the Cancellation Reason, and sign the note

Method: PowerChart

**Swim Lane:**

Role(s): Circulator/Procedure Nurse

Department(s):

Security Position(s): Perioperative - Nurse

**Decision [271]**

Description: Has the patient entered the OR?

**Work Step [307]**

Description: Complete pick list documentation appropriately

Method: Perioperative Document

**Work Step [309]**

Description: Open the Perioperative Doc with the Intraoperative Record

Method: Perioperative Document

**Work Step [311]**

Description: Document segments appropriately based on care provided, modify procedure to "Procedure Not Performed"

Method: Perioperative Document

Comments: Complete the 4 required segments, this must include the Case Attendees, Case Times, General Case Data, and Surgical Procedures segments. Other segments can be discontinued and finalize the Intraop Record

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**Work Step** [313]

Description: Discontinue unused segments

Method: Perioperative Document

**Work Step** [315]

Description: Finalize Intraop/Procedure record

Method: Perioperative Document

**System** [323]

Description: Intraop/Procedure Record and Pick List charges post to Charge Review application (case costing)

Step Impact: Regulatory

Regulatory Details: Medicare

**Work Step** [325]

Description: Set events to Case Cancelled in the perioperative tracking board

Method: PowerChart

**System** [328]

Description: Case displays as Cancelled within Perioperative Tracking

Method: PowerChart

Comments: The Perioperative Tracking display will update initially, typically for 30 minutes, before dropping off the view.

**Work Step** [331]

Description: Coordinate with appropriate personnel to ensure all subsequent perioperative records are terminated

Method: Perioperative Document

Value Impact: Patient Safety

Comments: If records are accidentally opened and not charted in, the record will have to be terminated. If left open, this will go to chart correction

**Decision** [293]

Description: Have any pick list items been physically opened, or been marked as Filled on the Case Pick List?

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**Work Step** [299]

Description: Complete pick list documentation appropriately

Method: Perioperative Document

**Work Step** [301]

Description: Terminate Intraop/Procedure Record and select appropriate Termination Reason

Method: Perioperative Document

**Work Step** [305]

Description: Select option to Send Pick List Charges

Method: Perioperative Document

**System** [321]

Description: Pick List charges (case costing) post to Charge Review application

Method: Perioperative Document

Comments: Charges will not post to patient record - used for case costing/item usage

**System** [442]

Description: Sends a message to ATC to complete the case.

Method: Novari ATC

**Decision** [428]

Description: Has Intraoperative record been opened?

**Work Step** [295]

Description: Terminate Intraop/Procedure Record and select appropriate Termination Reason

Method: Perioperative Document

**Work Step** [431]

Description: Notify the appropriate Nurse (OR) or Clerk (Endo/APU) to cancel the case

**System** [433]

Description: Case displays as Cancelled in Scheduling, Case Selection, and Perioperative Tracking

**Swim Lane:**

Role(s): Recovery Nurse

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Security Position(s): Perioperative - Nurse

**Off Page Reference** [\[401\]](#)

Workflow Link: Perioperative - Phase I Recovery

**Off Page Reference** [\[403\]](#)

Workflow Link: Perioperative - Phase II Recovery/Depart (incl. Endo/APU)

**Facilities:**

Facility Name: Niagara Falls Site  
Status: Approved  
Facility Cerner Owner: Kearns,Caitlin M  
Facility Client Owner: Boichuk (Doan), Kristen Rachel  
Authorize Date: Feb 16, 2024  
Facility Comments:

Facility Name: St. Catharines  
Status: Approved  
Facility Cerner Owner: Kearns,Caitlin M  
Facility Client Owner: Boichuk (Doan), Kristen Rachel  
Authorize Date: Feb 16, 2024  
Facility Comments:

Facility Name: Welland  
Status: Approved  
Facility Cerner Owner: Kearns,Caitlin M  
Facility Client Owner: Boichuk (Doan), Kristen Rachel  
Authorize Date: Feb 16, 2024  
Facility Comments: