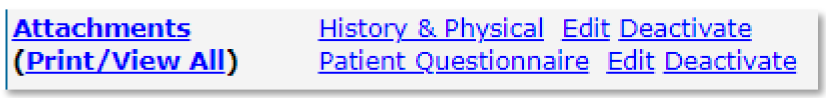
SWIM – Access to Care

PSS Workflow

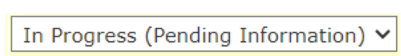
Quick Reference Guide

Recommended workflow activities for the PSS module including reviewing documents, adding/updating activities and rejecting a case.

Open case and review documents	
1. Open case	• From the **Calendar**, **Patient List** or **Patient Search**, find the patient and open to the **Case Details** screen

2. View Documents	• View all documents and check for completeness.
	    ○ To view a single document, click on the name of the document
	    ○ To view all attached documents, click **Print/View All**
	

3. Documents complete	• If all documents are complete print
	    ○ all attached documents
	    ○ the **OR Booking Form**
	• Add **Chart Print** to the activity list and update its status to **Complete**
	• Once printed, continue with regular workflow

4. Documents incomplete	• If there are missing, incomplete or outdated documents complete the following:
	    ○ **Missing** – click the **Send a message Regarding this Patient** hyperlink and request the missing documents
	    ○ **Incomplete** and **Outdated** – **deactivate** the document(s) and send a message to the SOA requesting an updated document.
	Reference the **Secure Messaging** QRG
	• Add a note to the "**Ready for Surgery**" activity to indicate the status of the outstanding documents
	• Update the **Ready for Surgery** activity status to **In Progress (Pending Information)**
	
	Monitor messages: a message will be sent when the new document is attached to the case.

5. Manage Case	• Process case per current paper-based practice

Clear Case – Patient cleared for surgery at the Care Venue	
1. Open case	• After the clinical assessment is complete, from the **Calendar**, **Patient List** or **Patient Search**, find the patient and open to the **Case Details** screen • Change the status of the **Ready for Surgery** activity to **Complete**
2. File paper chart	• Follow the site process and file chart as appropriate

Patient rejected for surgery at the Care Venue	
1. Open case	• From the **Calendar**, **Patient List** or **Patient Search**, find the patient and open to the **Case Details** screen
2. Change activity status	• Update the **Ready for Surgery** activity to **complete** • Add a note indicating why patient is not appropriate
3. Send Messages	• Send a message to the SOA explaining the circumstances and ask the SOA to cancel the case • Send a message to the Care Venue to remove the patient from the SIMS slate
4. File paper chart	• Follow site process and file chart as appropriate