

OpTime Fundamentals

This slideshow is used for both **OR100** and **OR101** courses.

Please refer to the first lesson of the [OR100/101 companion](#) for guidance on how to self-study this course.

Self-Studying For...

Certification/Accreditation/Proficiency?

- Review the respective Epic Training Guide that applies to you for steps to attain either certification or proficiency:
 - [Epic Community Member](#)
 - [Consultant](#)
- Use the [Train Tracks](#) on the UserWeb to see the course and assessment requirements

Continuing Epic Education?

- Studying Fundamentals is not required for your CEE.
- Use the [Application Essentials Exam Study Checklist](#) on the Galaxy to see the courses you need to review, links to those documents, and a link to sign-up for the appropriate exam.
- For more general questions, review the [Continuing Epic Education](#) guide on Galaxy.

Training Environments

Virtual Training (aka class environments)

- Separate trn#### environments for each course offering
- Assigned to use for a specific course you are taking
- Limited lifespan that ends shortly after class

Study environments*

- <version> <letter> in name
- For going back through your training materials
- For studying, practicing, playing, etc.!
- Refreshes weekly on Friday evenings

Project environments

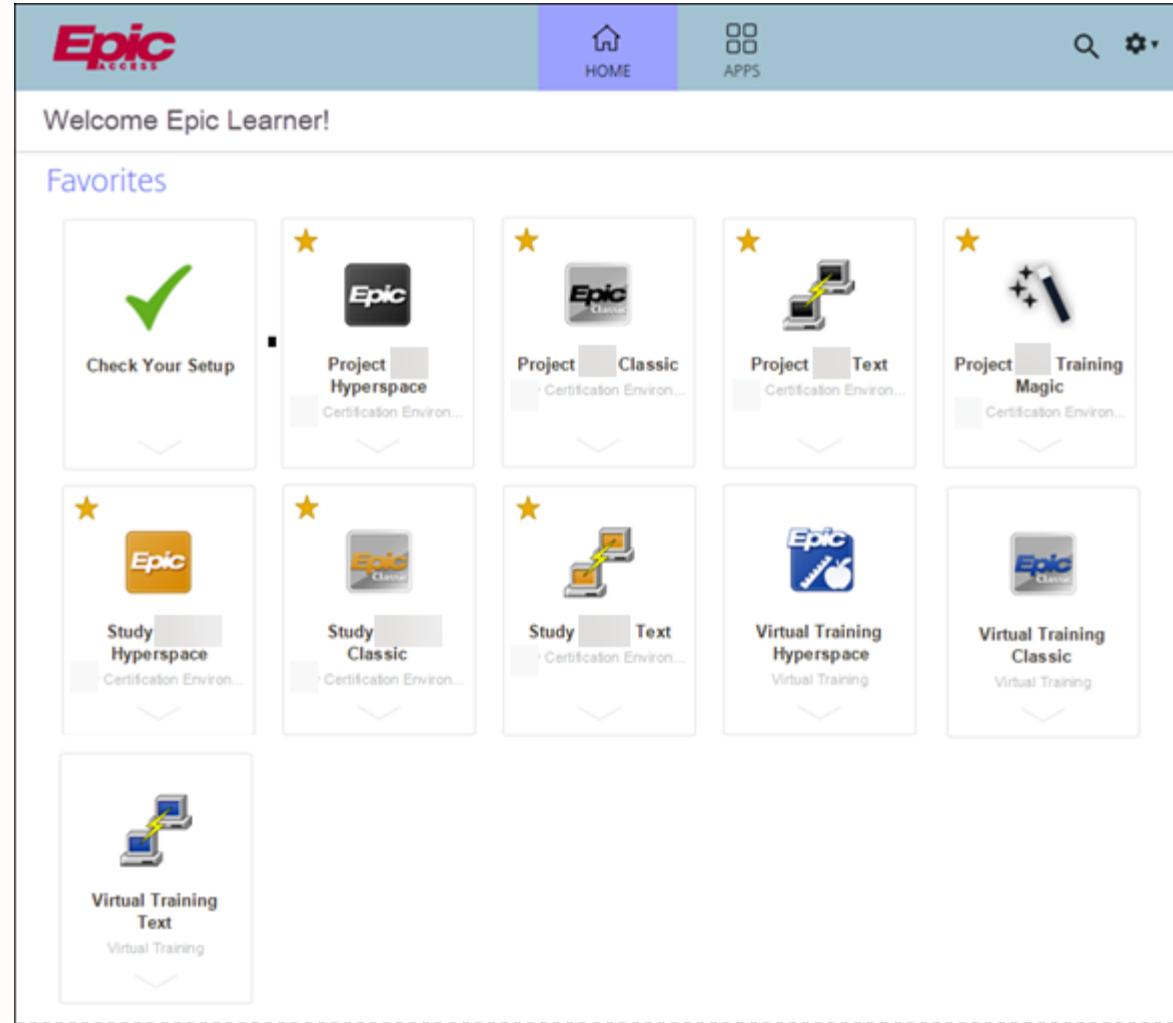
- <version> in name
- For completing your project
- Rarely refreshes, check training.epic.com

For Europe Study and Project environments, each will begin with AMS.

For Virtual Training and Study, use your classroom information sheet users.

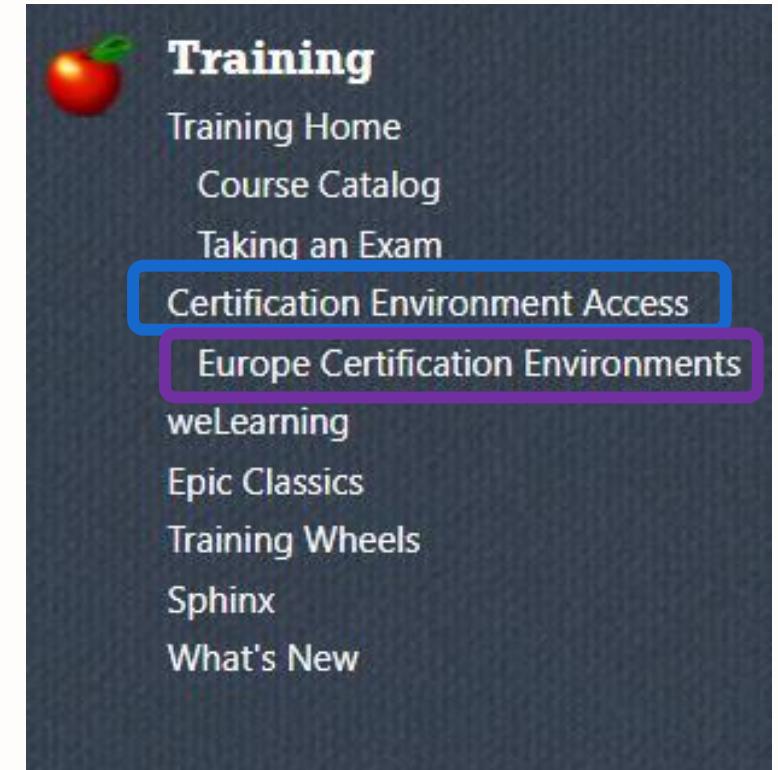
For Project, use any users created during the project setup steps for the project as well as your classroom information sheet users.

*Training Wheels / TED Courses have different Study environments and users



Training Environments

1. Log in to the UserWeb.
2. Find the Training menu on the right side of the screen and select the [Certification Environment Access](#) link (or [Europe Certification Environments](#) if you are based in Europe or the Middle East).
3. If prompted, log in again with your UserWeb username and password.
 - Use MFA if prompted.
4. Use the search bar in the upper right to search for the following environments:
 - Study __ Hyperspace
 - Study __ Classic
 - Study __ Text
 - Project __ Hyperspace
 - Project __ Classic
 - Project __ Text
 - Project __ Training Magic
5. Click the star to add each environment to your Favorites. These environments will now appear on the Home tab.



Don't have environments for the correct version? Follow the steps in the introduction lesson of the companion to request them.

Not sure what Classic is? Read the [Hyperdrive and Classic Clients in Project Team Training](#) document on Galaxy.



Looking for Study Patients?

The ones on the Classroom Information Sheet appear weekly in the practice environments, usually scheduled on the previous Friday.

Agenda

1. Introduction
2. Overview of OpTime
3. Plan and Arrange for Surgery
4. Prepare for Surgery
5. Document Surgery
6. Recover from Surgery
7. Charge for Surgery
8. Reporting in OpTime
9. Homework: Lab Exercise

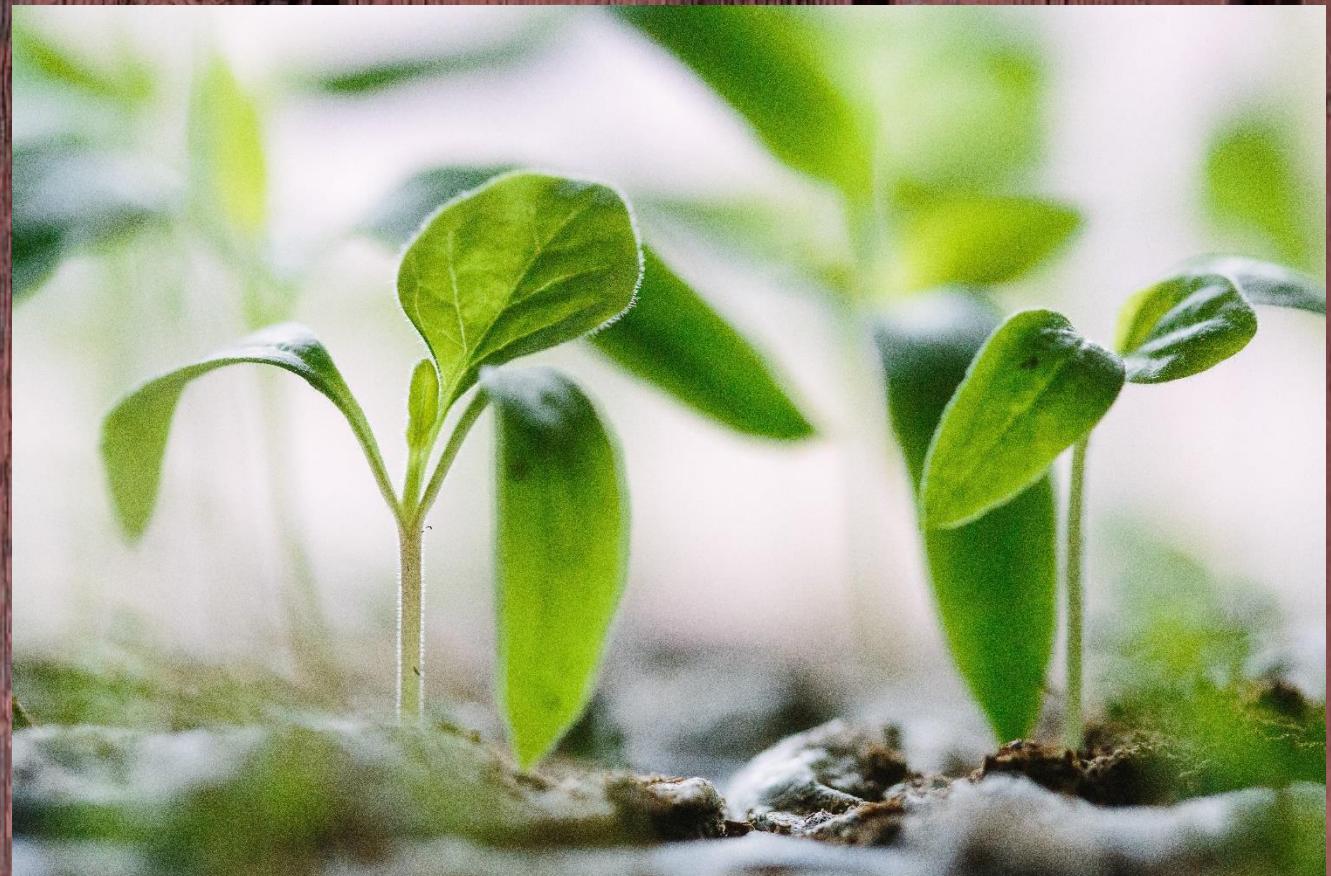


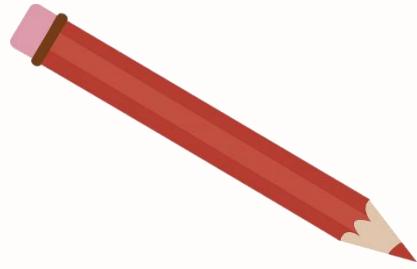
Lesson 2

Topics covered in this section:

- Overview of OpTime
- Common OpTime End Users
- OpTime Workflow

OpTime Workflow Overview





OpTime Overview

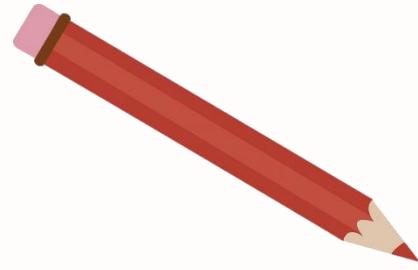
OpTime supports two core functions:

Surgical Case Documentation

A *surgical case* is the plan for surgery.

Surgical Log Documentation

A *surgical log* is the legal medical record of the surgery.



Common OpTime End Users

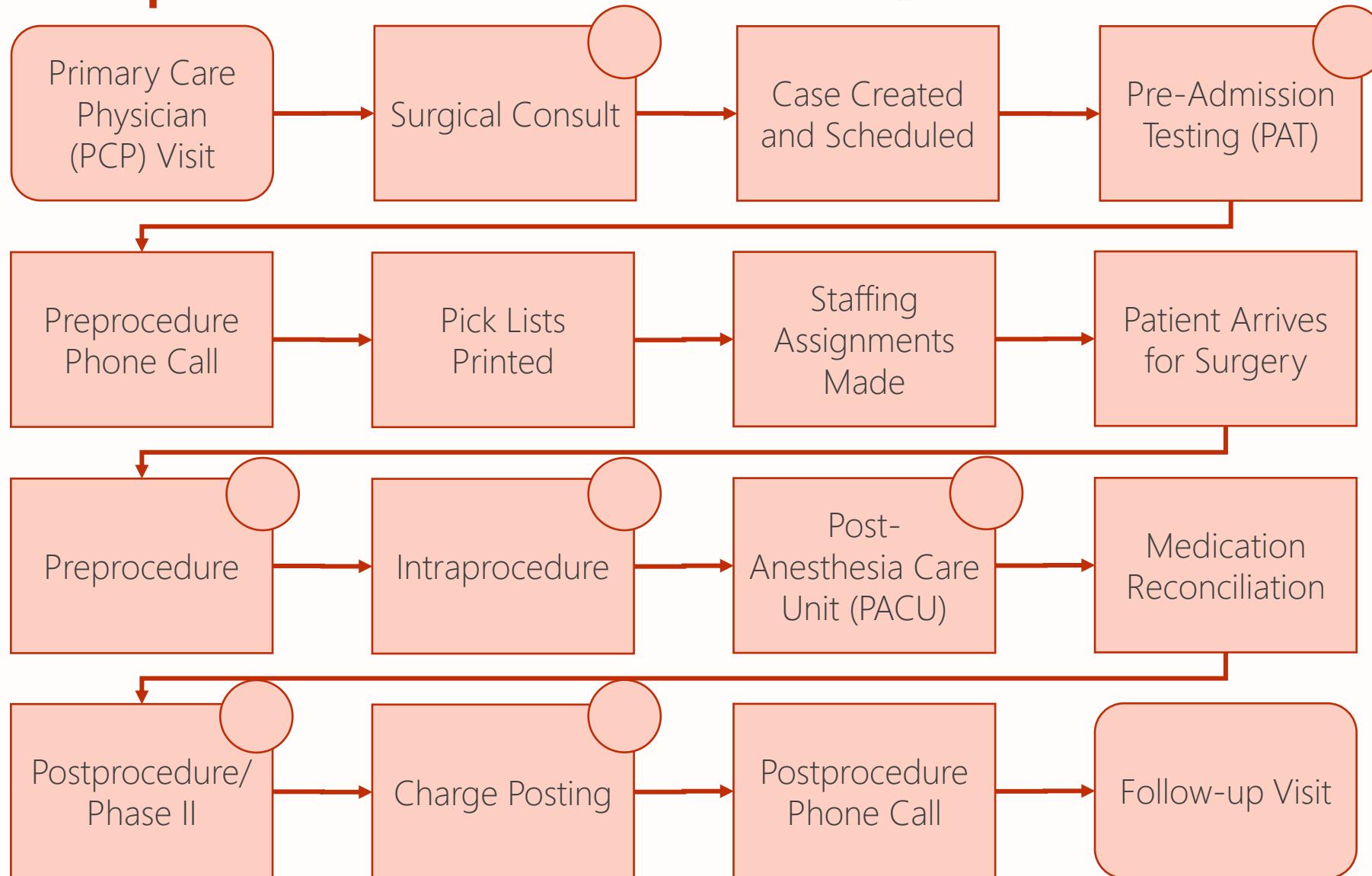
Clinical Users

- PAT Nurses
- Preprocedure/Phase II Nurses
- Intraprocedure Nurses
- PACU Nurses
- Charge Nurses
- Surgeons

Non-Clinical Users

- OR Schedulers
- Charge Posters
- Preference Card Builders
- OR Managers
- OR Administrators

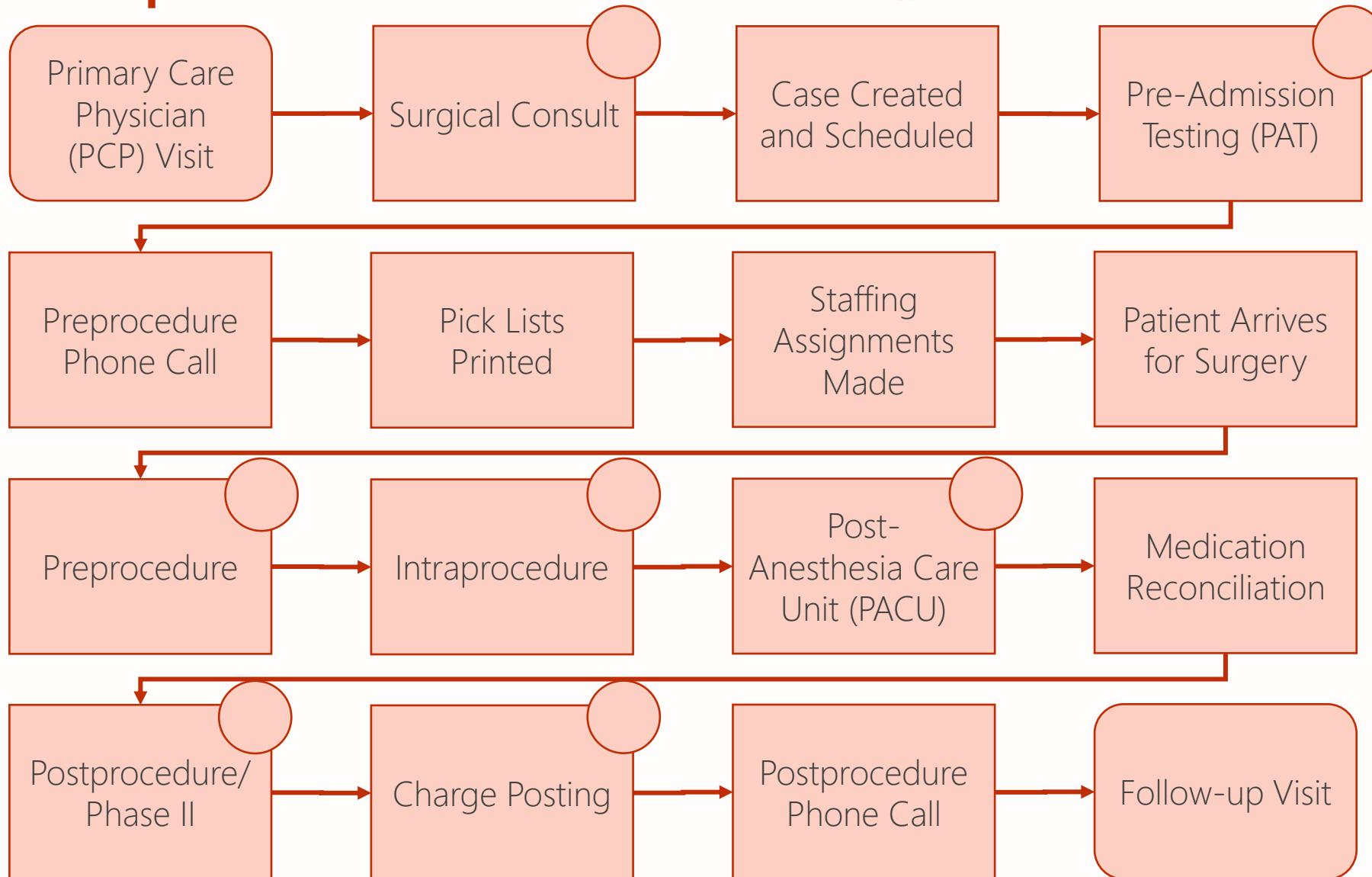
OpTime Workflow



Primary Care Physician (PCP) Visit

Appointment with a patient's primary care physician to assess complaints and conditions. PCP may then recommend a surgical consult.

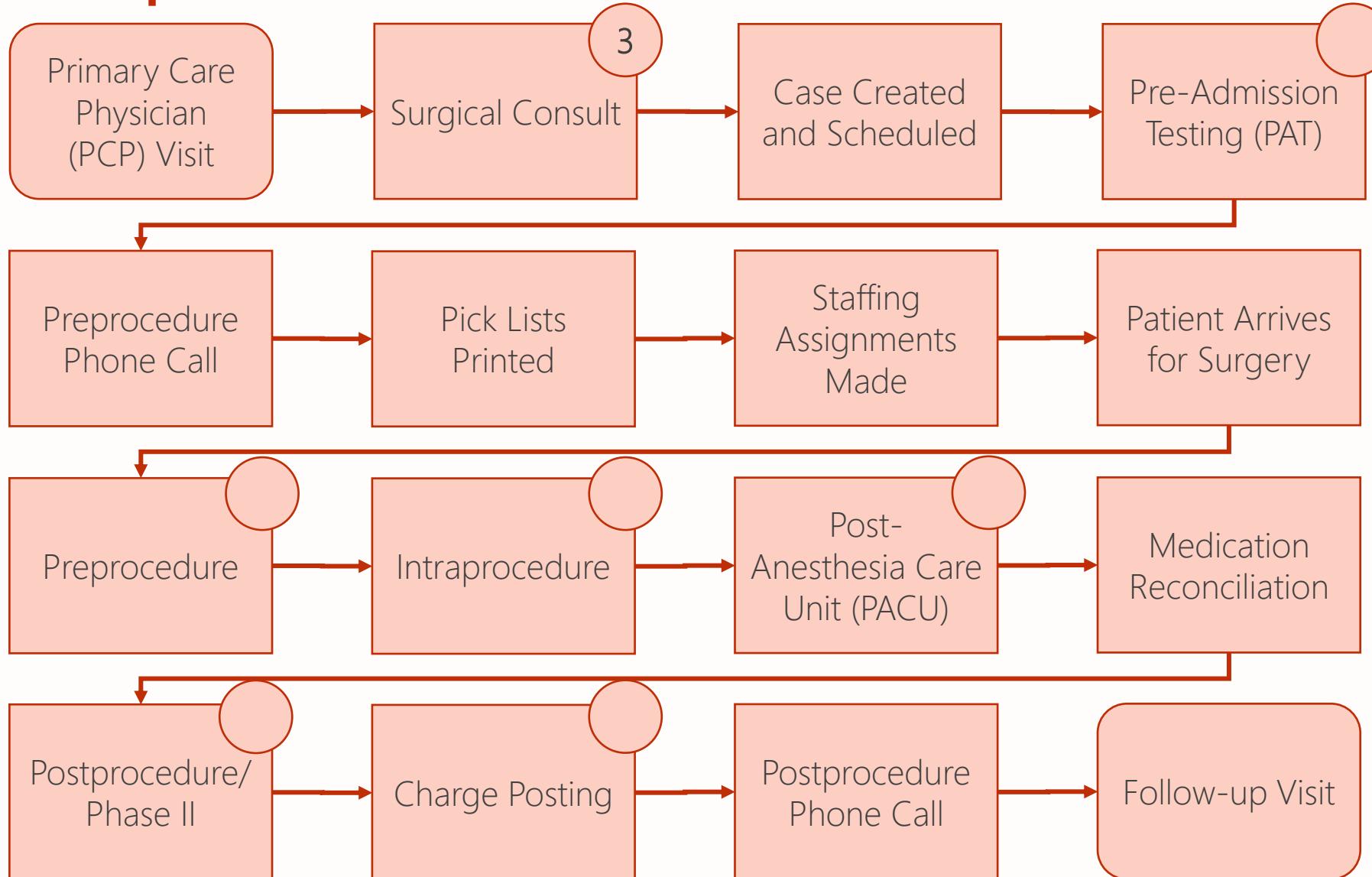
OpTime Workflow



Surgical Consult

Appointment with surgeon to assess whether surgery is the right option for a patient.

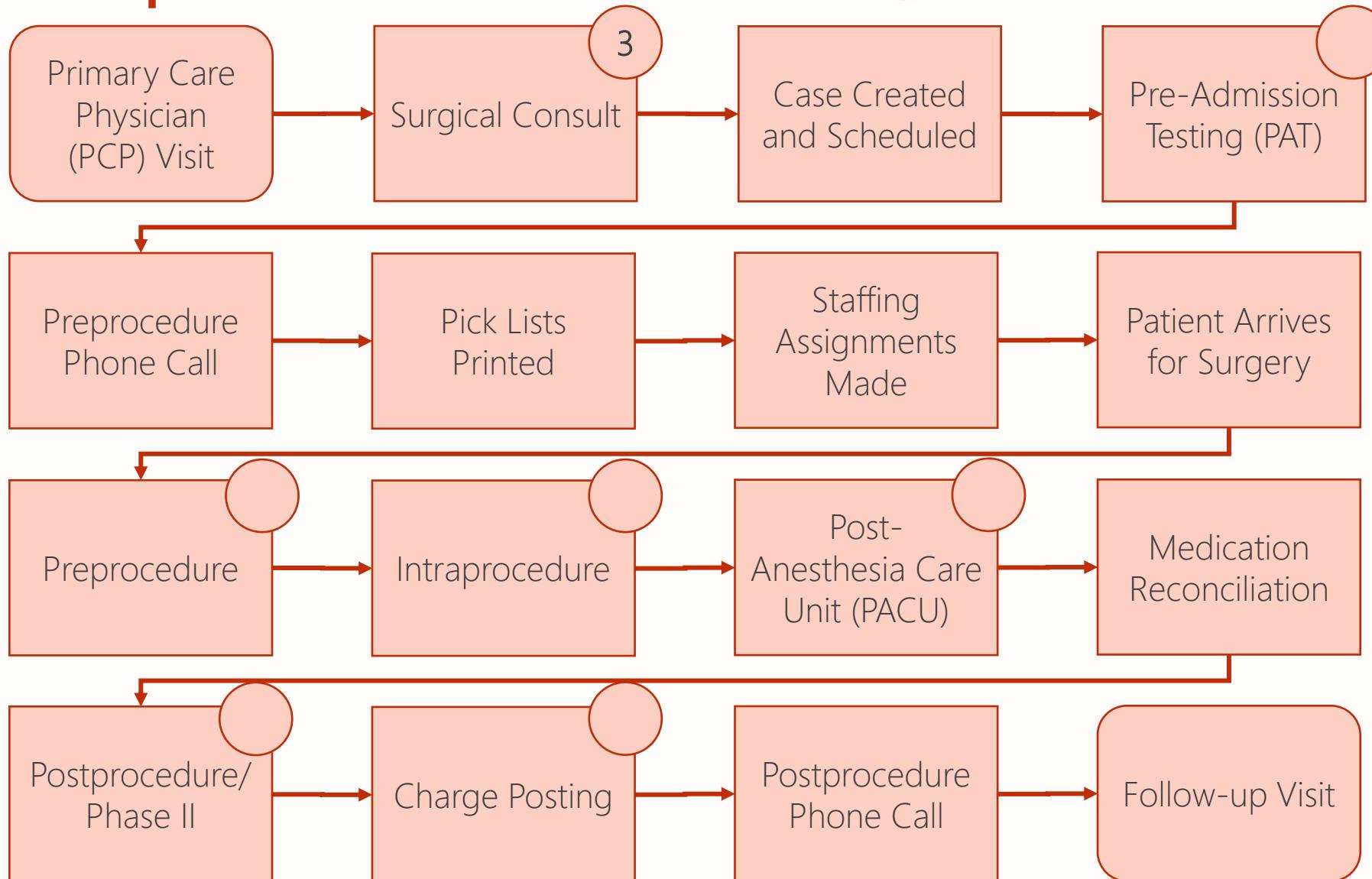
OpTime Workflow



Case Created and Scheduled

Plan for surgery outlined, including the procedure, staff requirements, and more, and then scheduled into an operating room.

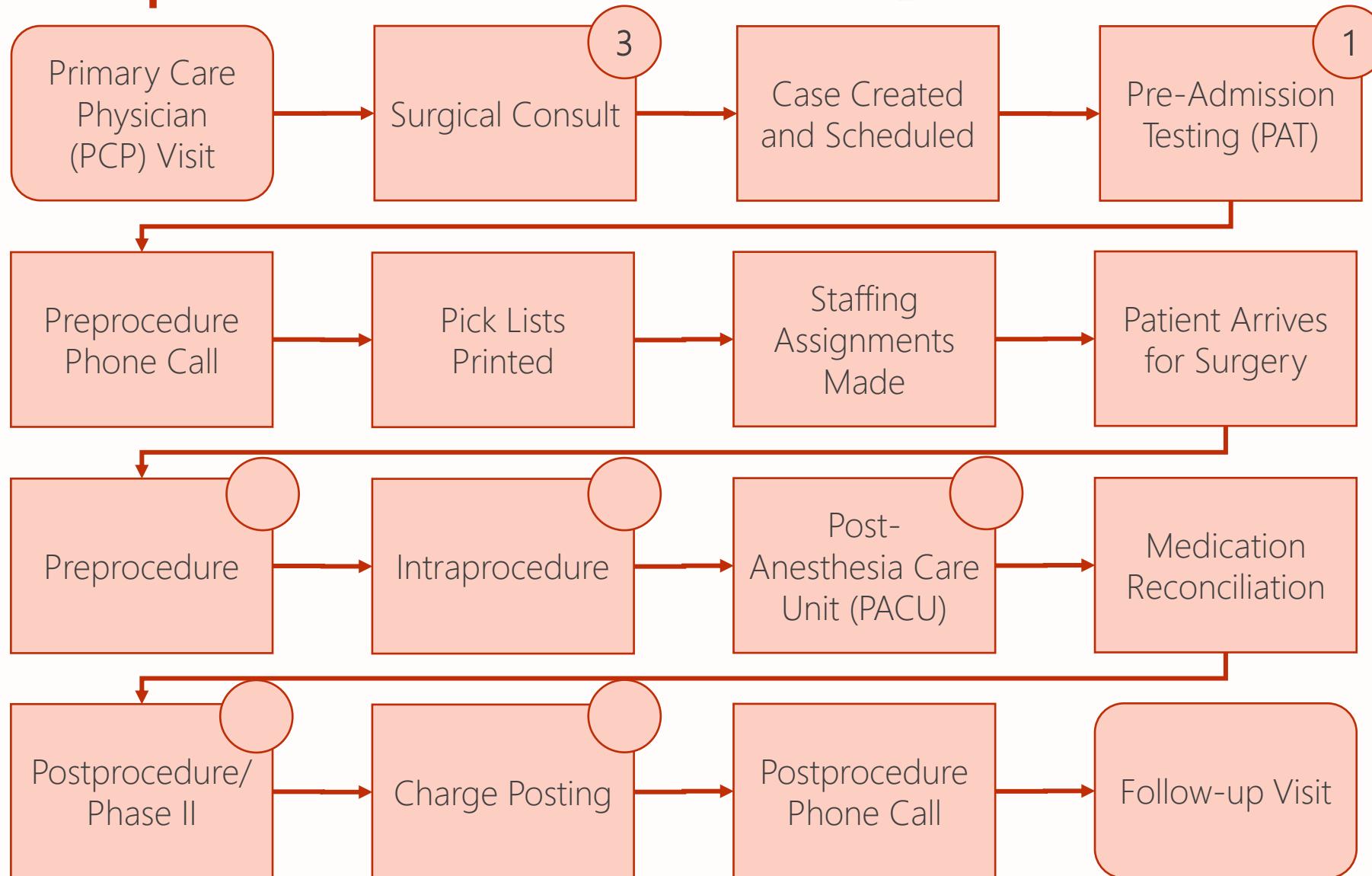
OpTime Workflow



Pre-Admission Testing (PAT)

A call or appointment to conduct a medical check-up and perform lab tests to assess a patient's condition and potential risks before surgery.

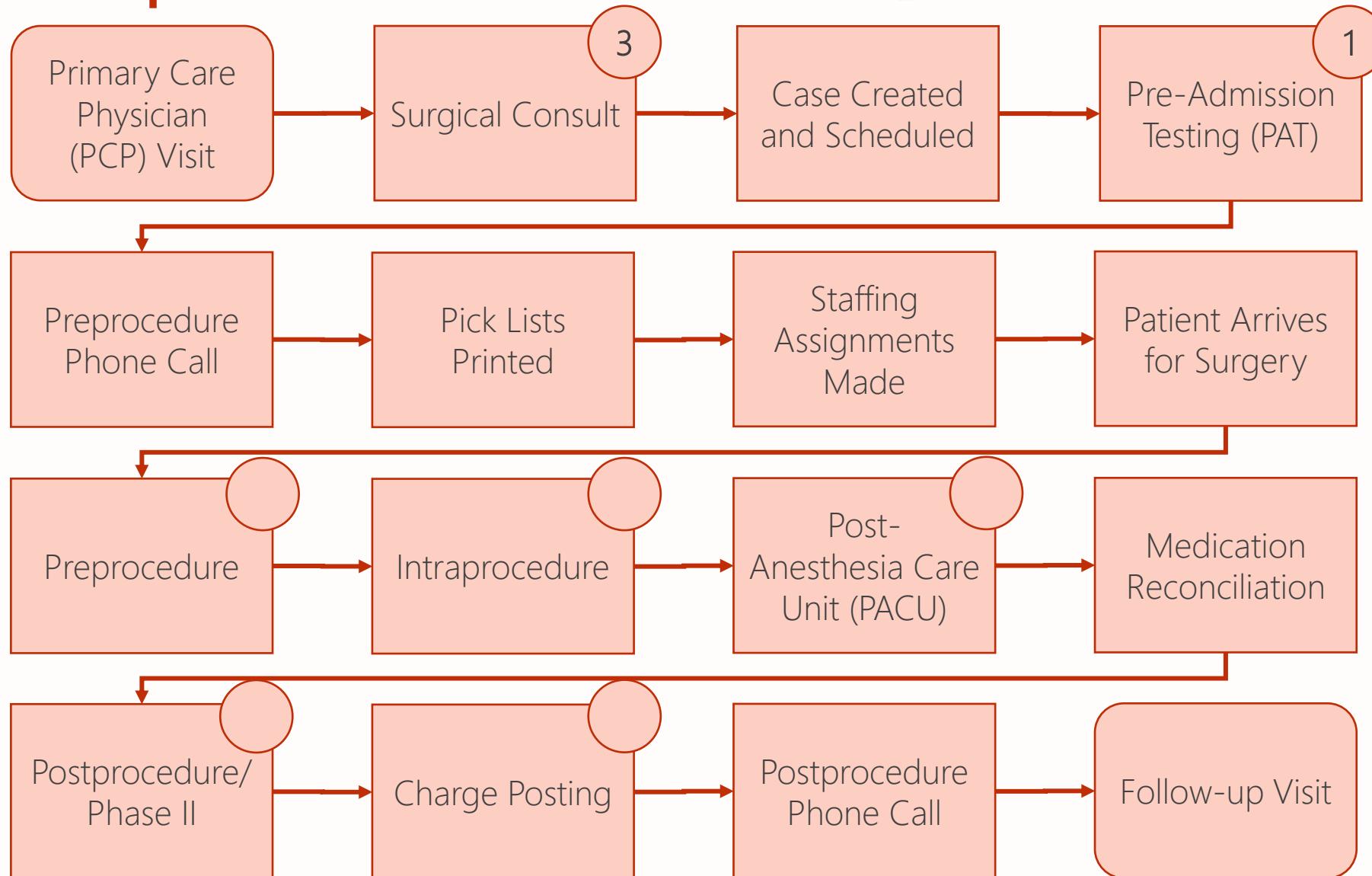
OpTime Workflow



Preprocedure Phone Call

Pre-surgical screening call from a nurse to ask questions, review medical history, give instructions, and ensure the patient is ready for surgery.

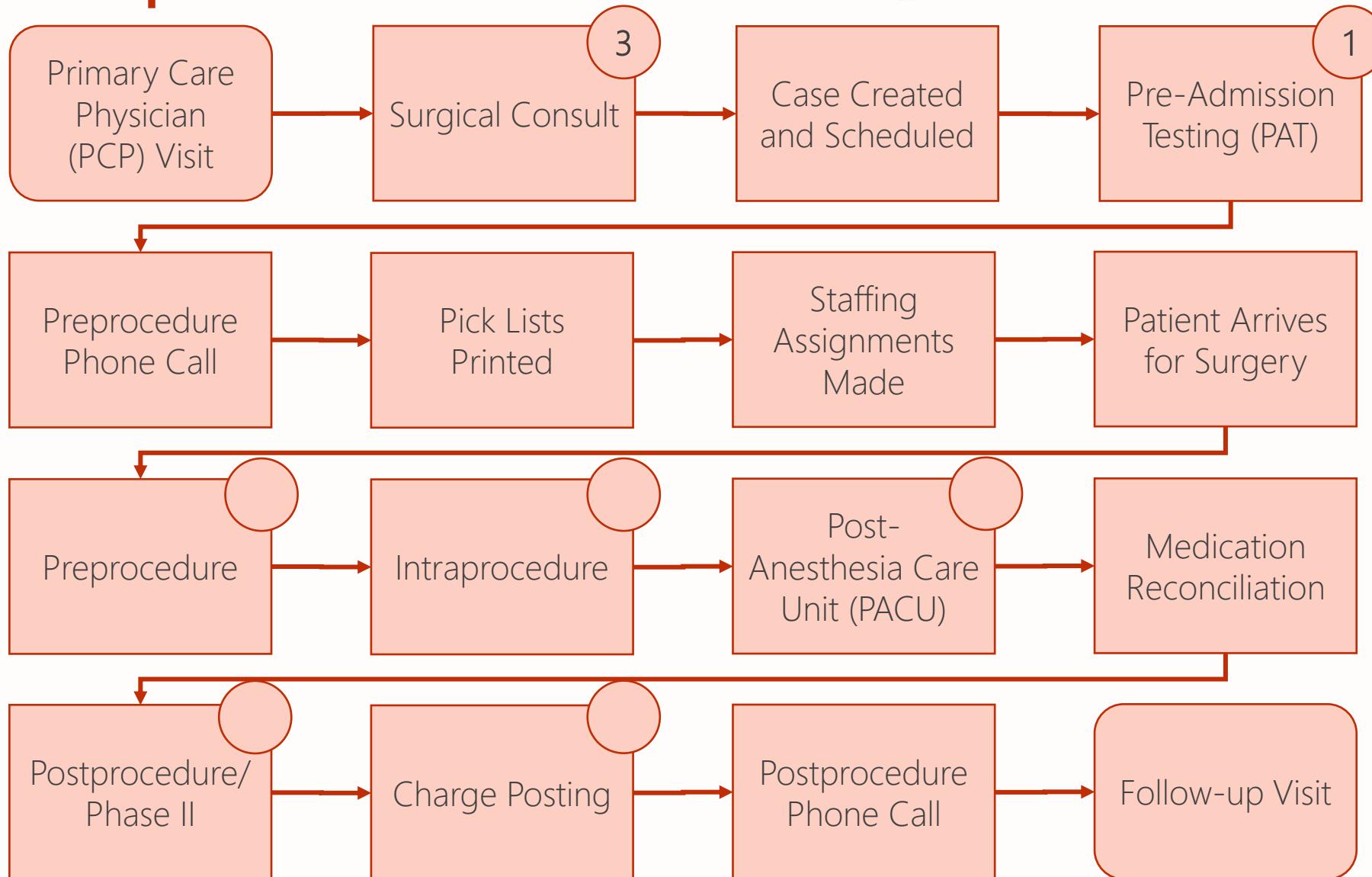
OpTime Workflow



Pick Lists Printed

The morning of surgery, lists of supplies and medications needed for surgery are printed and prepared in each operating room.

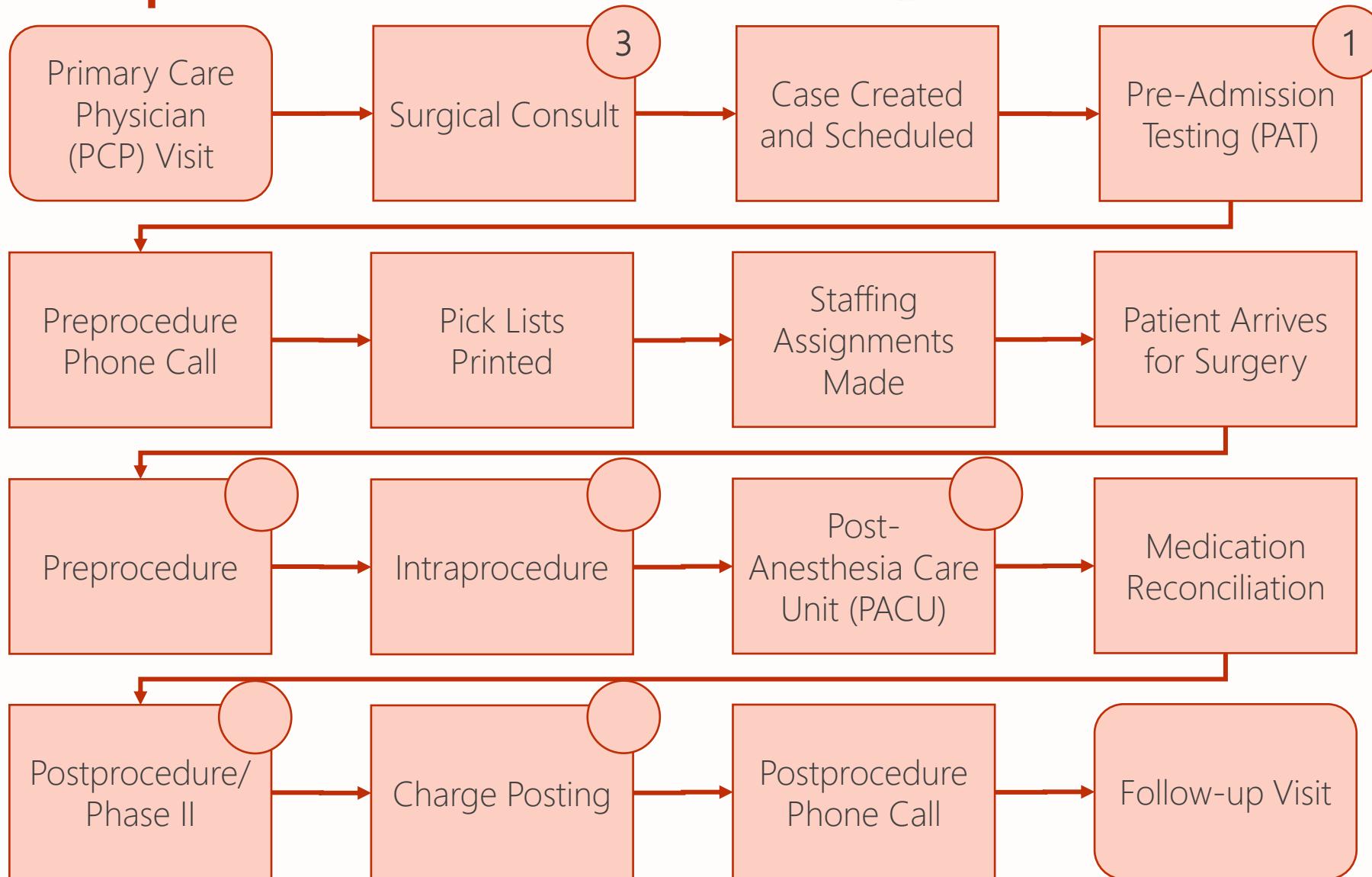
OpTime Workflow



Staffing Assignments Made

The morning of surgery, available staff and machines are assigned to cases or rooms.

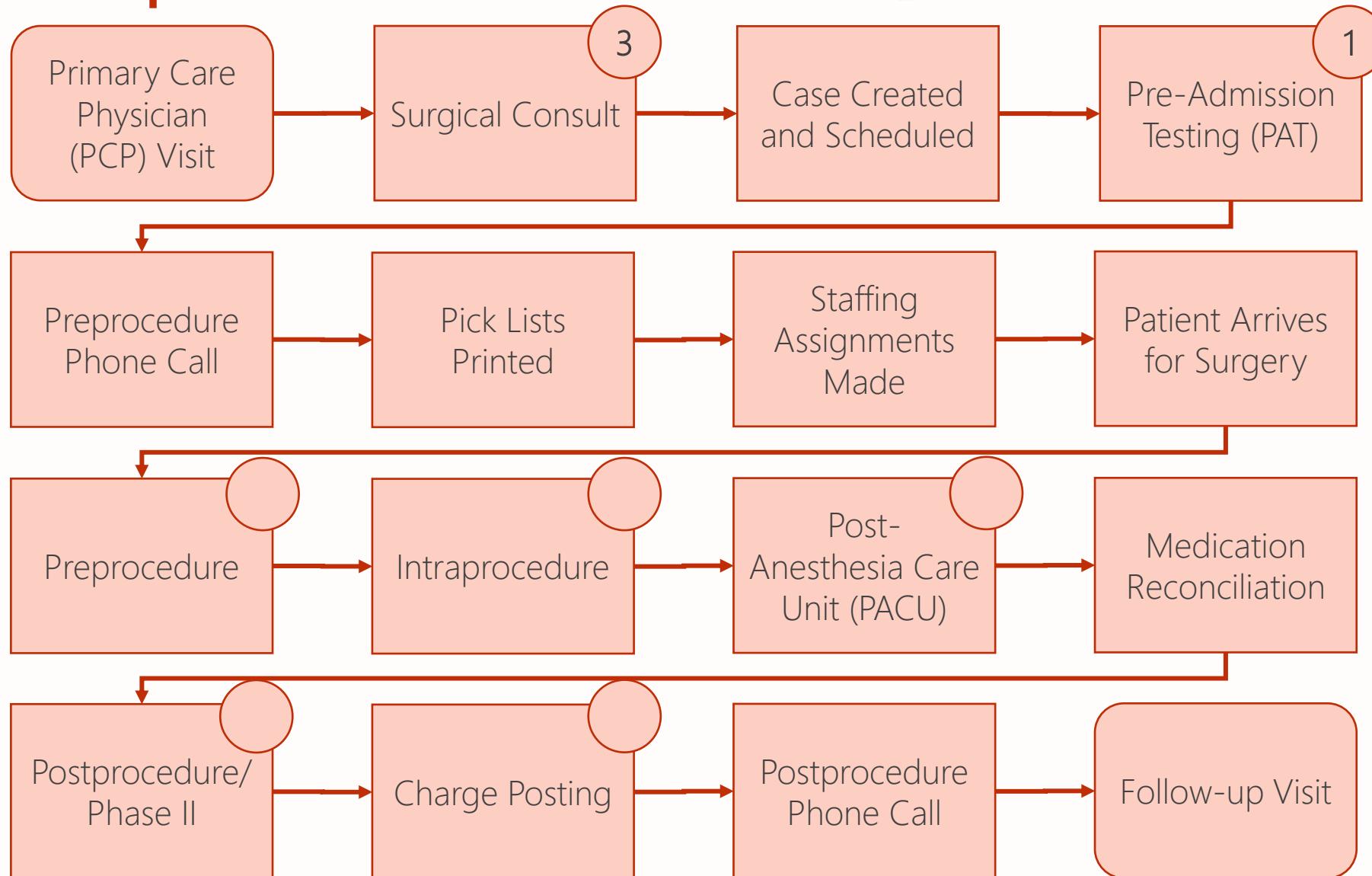
OpTime Workflow



Patient Arrives for Surgery

The patient arrives (hopefully on time!) to the hospital or ambulatory surgery center for surgery.

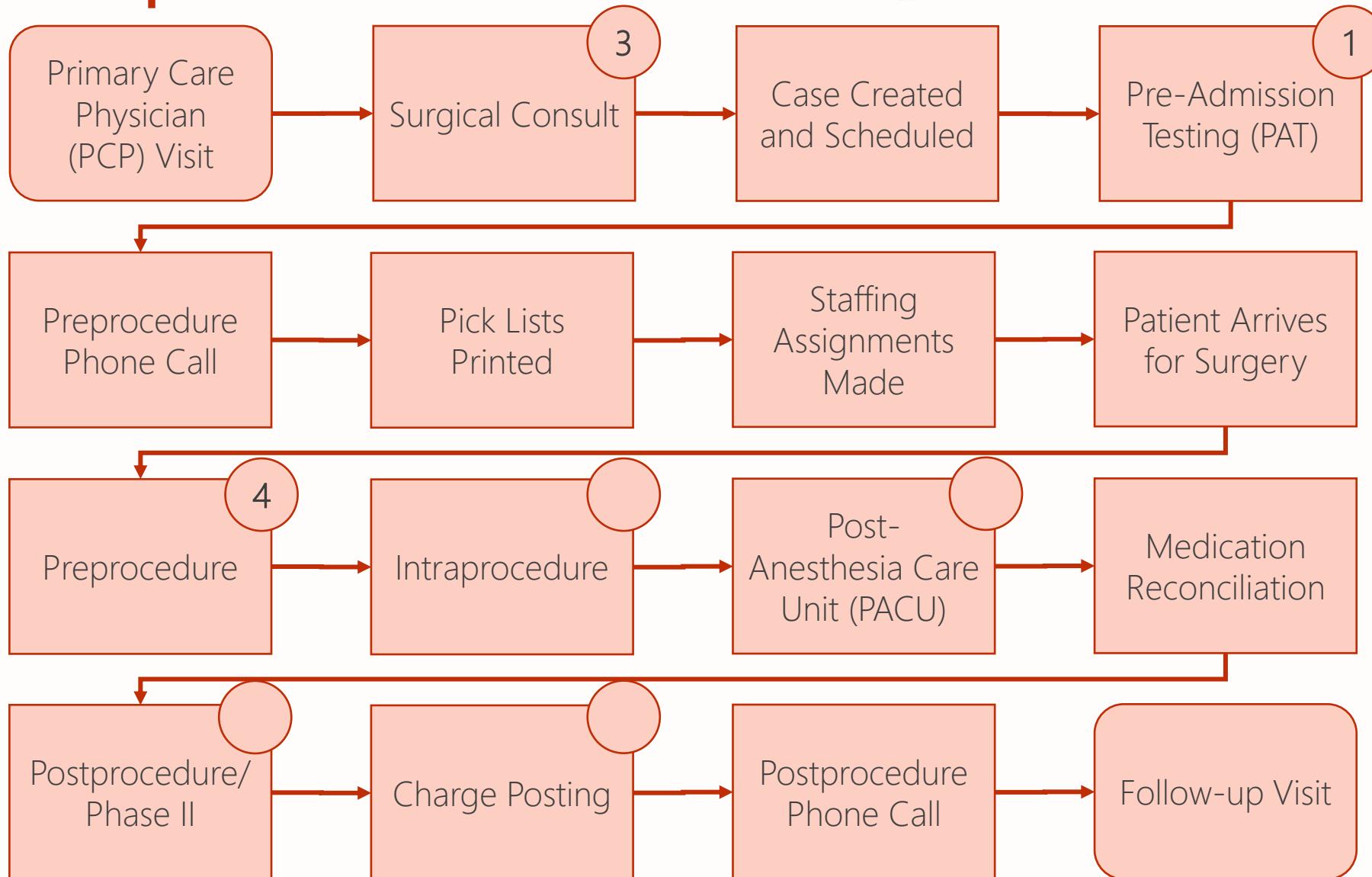
OpTime Workflow



Preprocedure

Workflow to prepare the patient for surgery, including verifying history, reviewing allergies, and administering preprocedure antibiotics.

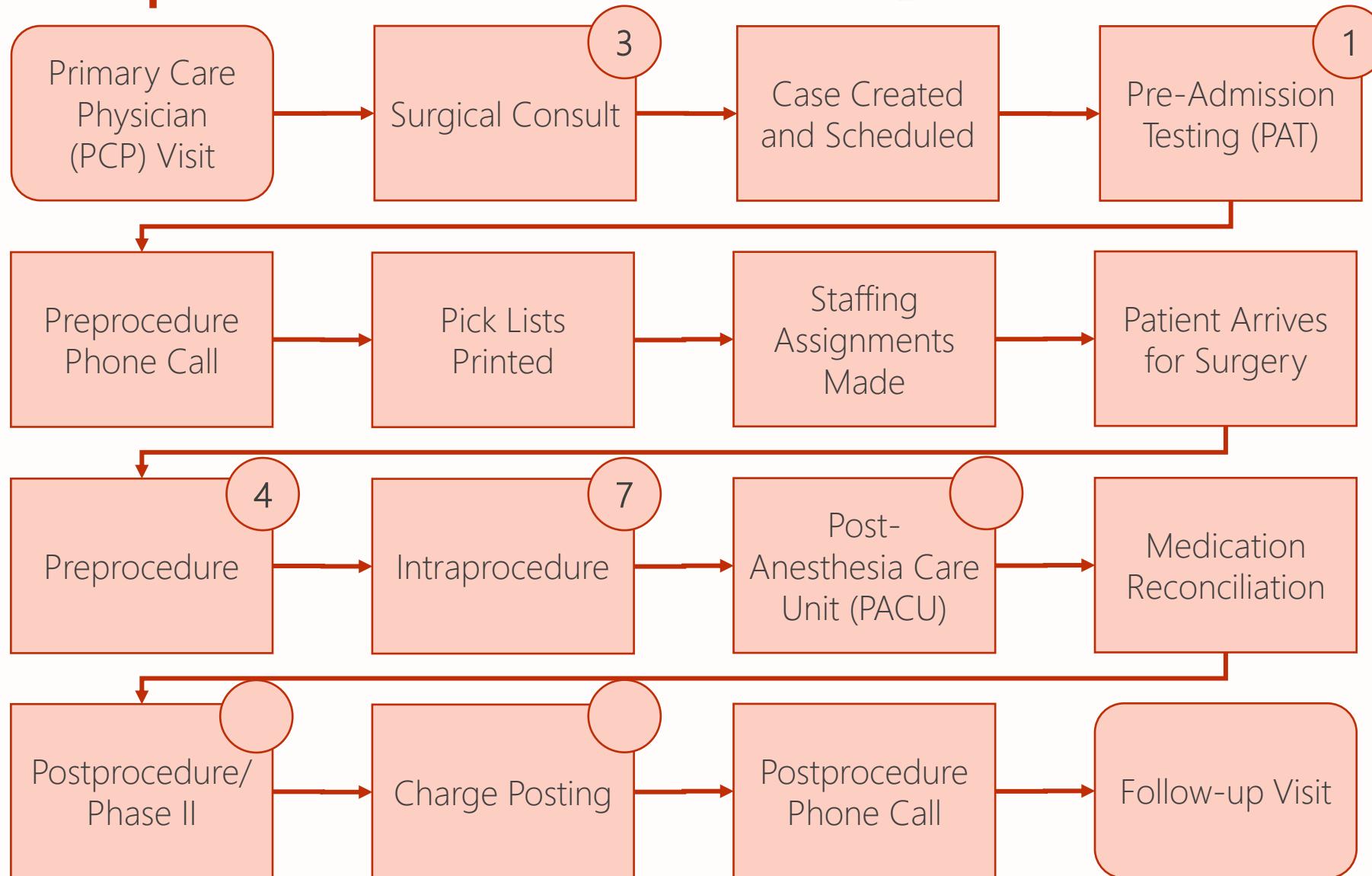
OpTime Workflow



Intraprocedure

Workflow to document what happens during surgery, including incision site preparation, supply usage, and surgical timeouts.

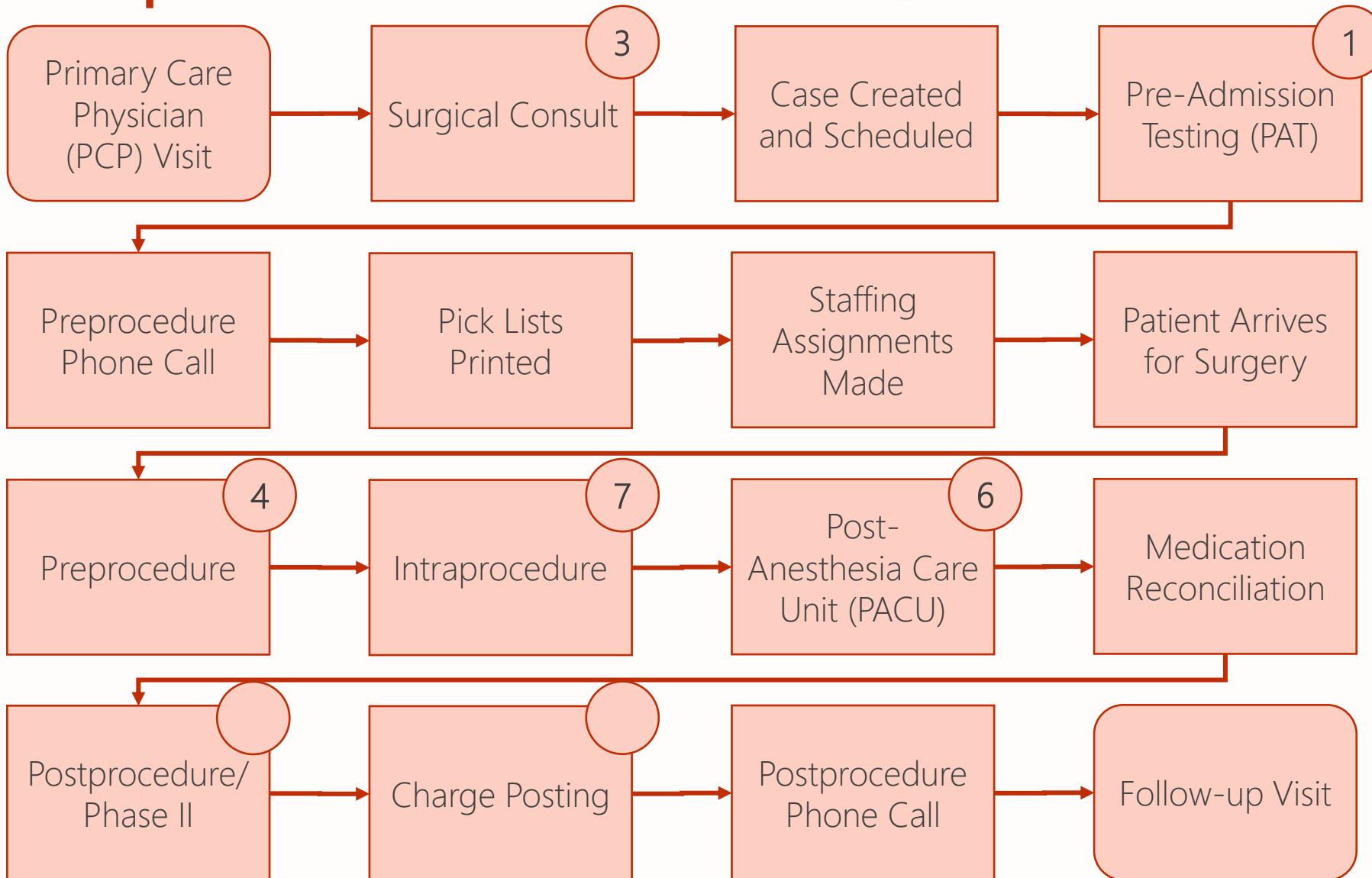
OpTime Workflow



Post-Anesthesia Care Unit (PACU)

Workflow to see the patient through the initial recovery process, including monitoring vitals and cognitive functions.

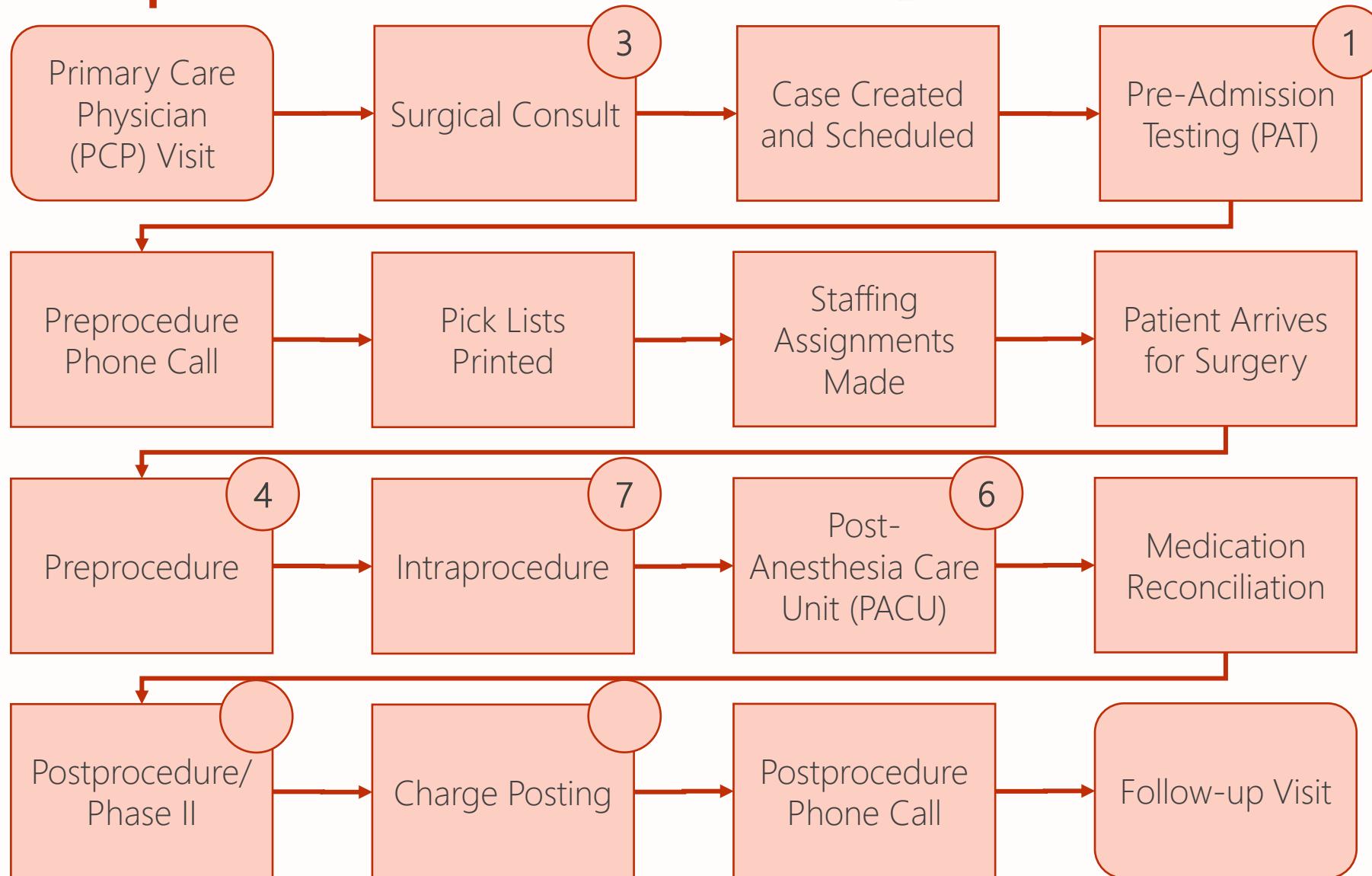
OpTime Workflow



Medication Reconciliation

The process of reviewing a patient's perioperative medications to determine what should continue or not after leaving the surgical ward.

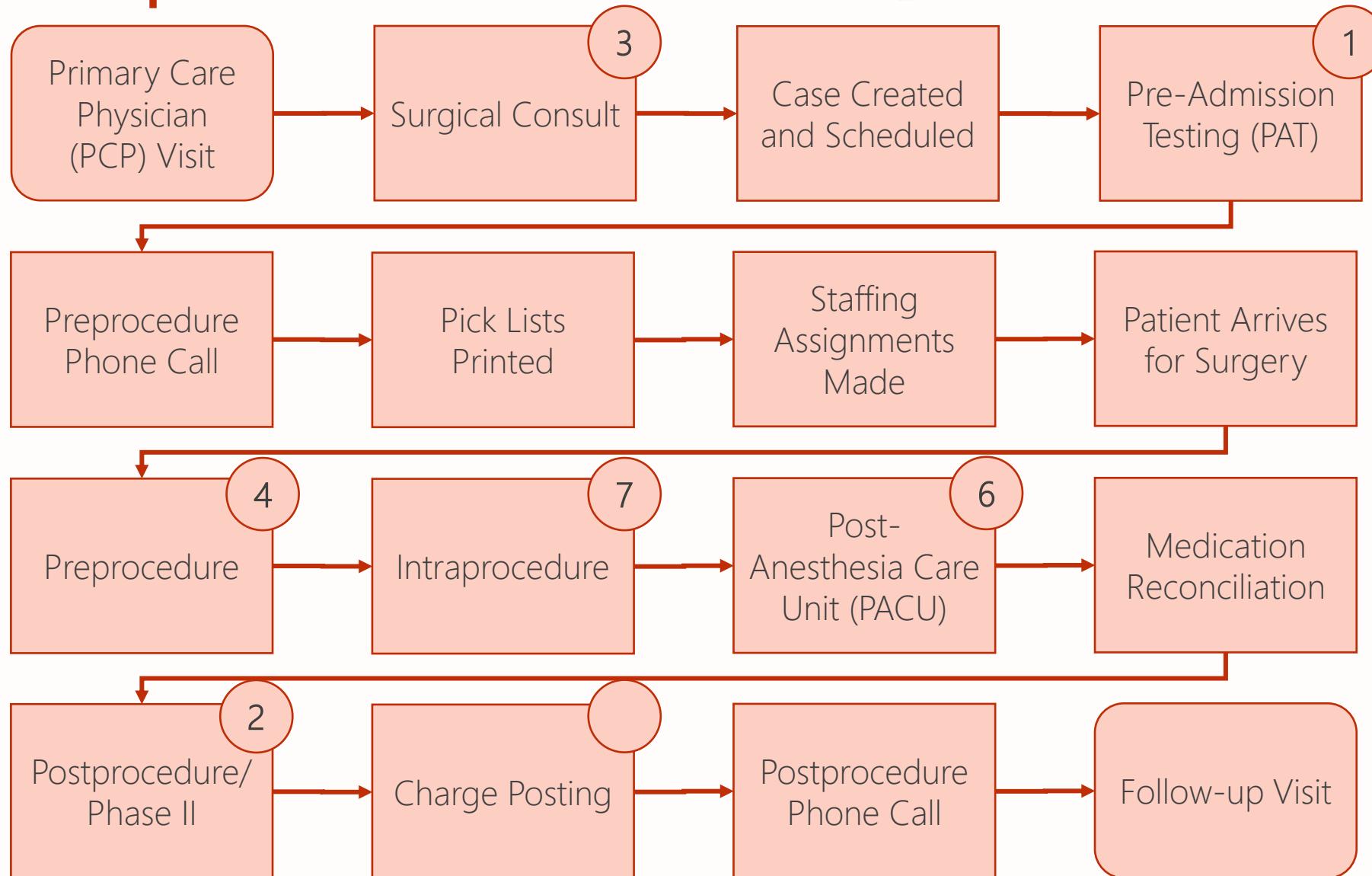
OpTime Workflow



Postprocedure/ Phase II

Workflow to prepare the patient for discharge or transfer, including returning belongings and providing postprocedure care instructions.

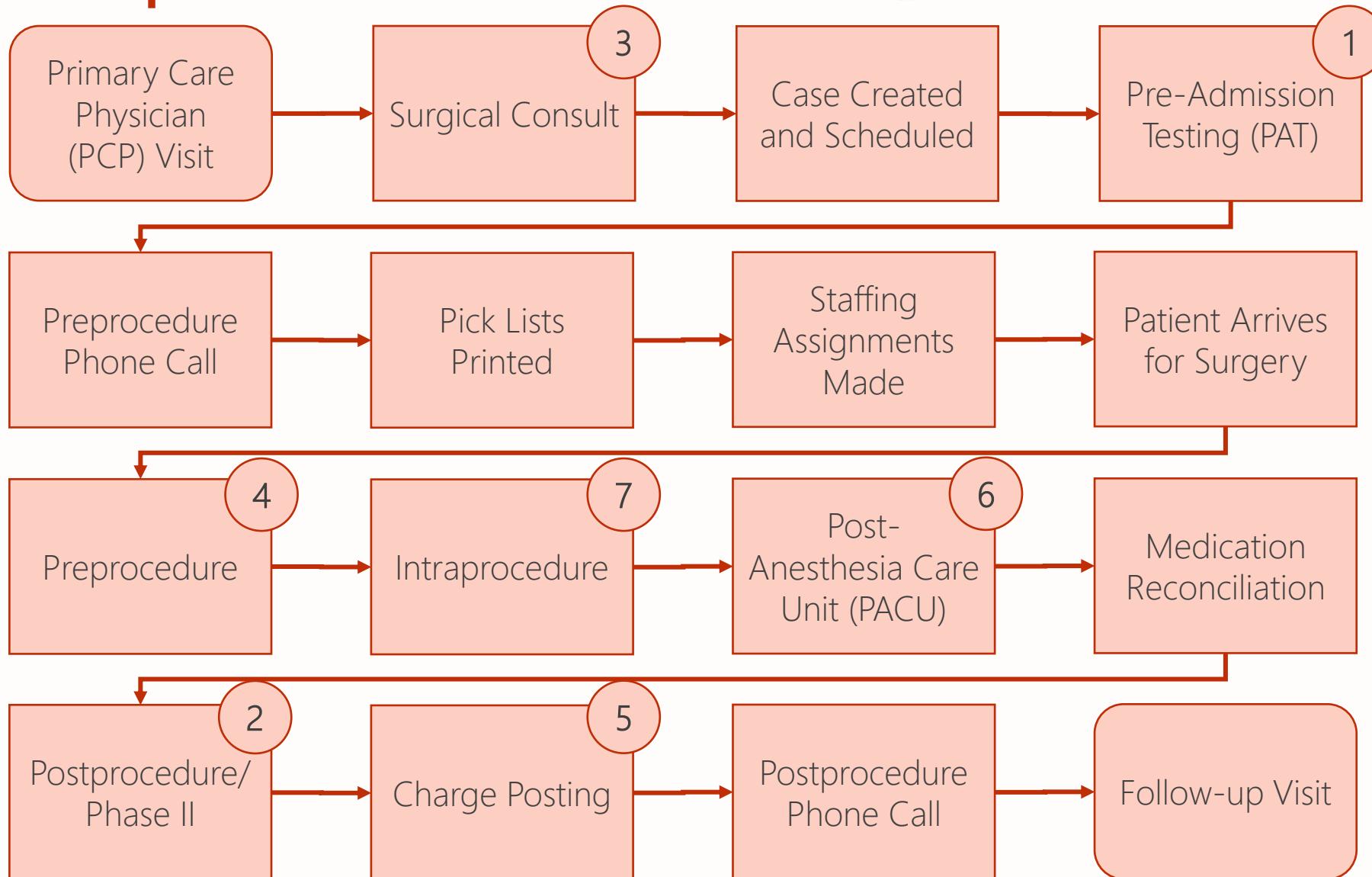
OpTime Workflow



Charge Posting

The process of reviewing and correcting billing information generated from surgery documentation and sending it to the billing team.

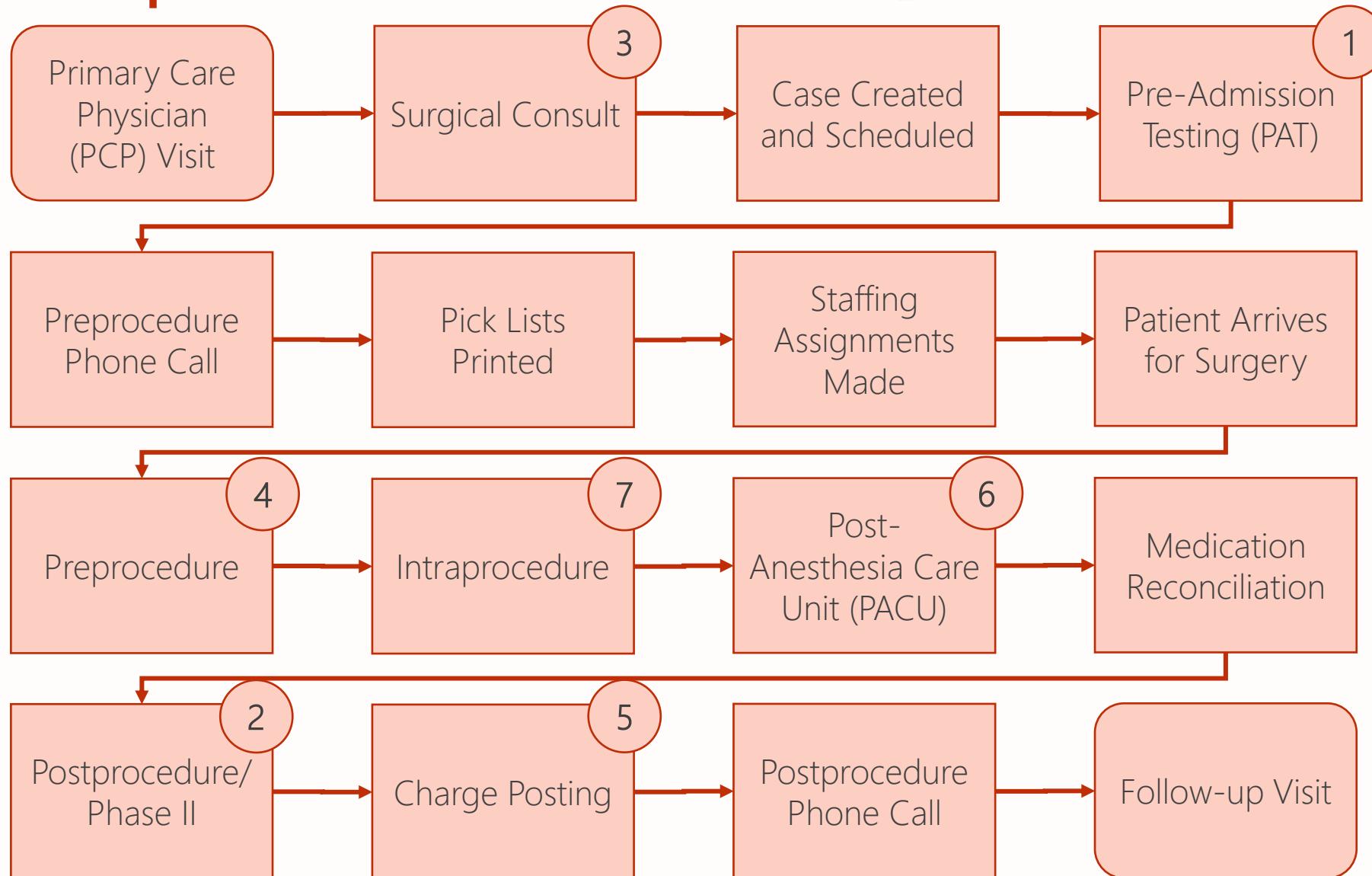
OpTime Workflow



Postprocedure Phone Call

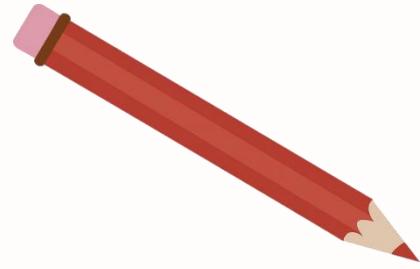
Post-surgery call from a nurse to check in with the patient, review their recovery, and answer questions.

OpTime Workflow



Follow-up Visit

An appointment with a physician after surgery to ensure a healthy recovery, including assessing the incision site and removing stitches.



Write It Down!

The Foundation System is...

the basic configuration of Epic, created by Epic and ready to be used with minimal configuration.

Lesson 3

Topics covered in this section:

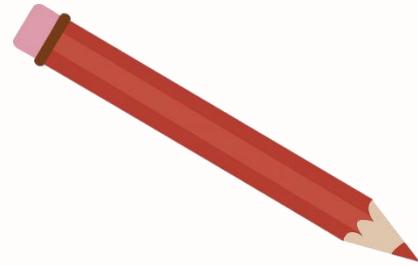
- Orders
- Snapboard
- Case scheduling
- Resource assignment

Plan and Arrange for Surgery



Plan and Arrange for Surgery Overview

- Reviewing patient information, such as allergies and history.
- Placing preprocedure orders, such as lab tests and prophylactic antibiotics.
- Creating and scheduling a case.
 - Cases may be created by surgeons through a case request order.
- Assigning staff and other resources the morning of surgery.
- Preparing operating rooms (ORs) with necessary items and medications.



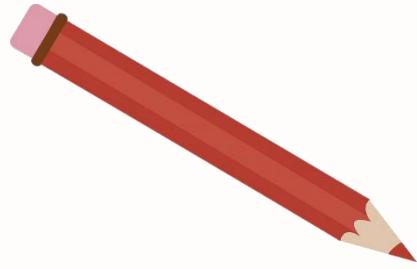
Write It Down!

An **order** is...

something a provider authorizes for a patient, such as a medication or a lab.

A **case request order** is...

a tool surgeons use to define case details and request time in an operating room.



Write It Down!

The five programmatically required items in a case are...

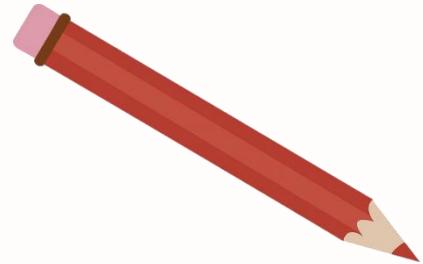
1. Patient
2. Location
3. Service
4. Procedure
5. Surgeon



Exercise Time!

- 1) Exercise: Finish Placing Orders for Surgery
- 2) Beyond the Basics: Sign Your Visit

Remember, you can work on optional activities now or later!



Write It Down!

Snapboard: OR - Main Scheduler (Tue 1/11/2022) (Last refresh <1m ago)

0600 - 1400 ▾ Needs ⚙ (D)

Search Circulator Anesthesiologist C-Arm

Circulator: Circulata, Dana, RN
Meyer, Sally, RN

Anesthesiologist: Moon, Debbie
Otedola, Kehinde, MD
Serrano, Cristóbal,...

C-Arm: C-ARM 01
C-ARM 02
C-ARM 03
C-ARM 04
C-ARM 05

OR - Main Scheduler (A)

OR 01 +00:00 OR 02 +00:00

0700 - 1000

1/11/2022 1 2 Days (C)

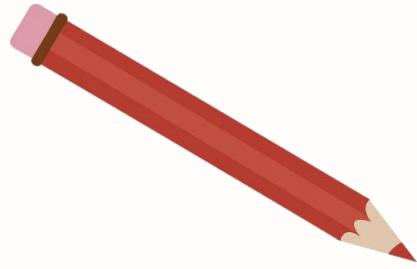
Jan 2022 26 27 28 29 30 31 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 1 2 3 4 5

A.. D.. C.. S.. A.. R.. C.. C.. Surgeon Procedure (B)

+ Timely, H., Md Replacement, Mitral Valve
+ Ticker, G., Md Replacement, Tricuspid Valve
+ Timely, H., Md Appendectomy, Laparoscopic

Main Cases ⚙ Main Cases L&D Cases





Write It Down!

Case Entry is...

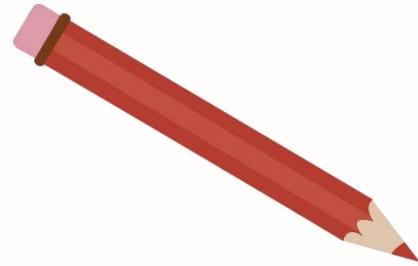
an activity used by schedulers to create and update cases.



Exercise Time!

- 3) Exercise: Schedule Another Case
- 4) Exercise: Assign Resources
- 5) Beyond the Basics: Explore the Snapboard

Remember, you can work on optional activities now or later!



Write It Down!

Tool	Description
Remove	Takes one case off the schedule and moves it to the Depot to be rescheduled later.
Cancel	Takes one case off the schedule, but does not return it to the Depot. Used when a planned case will no longer happen.
Void	Used to get rid of a case that was created in error and was never planned. Only available for unscheduled cases.
Shuffle	Takes multiple cases off the schedule to a temporary Depot to be rescheduled and puts a hold on the schedule where those cases were.
Rearrange Cases	Allows you to change the order of all cases in a single room.
Swap Cases	Switches all cases from one room with those of another.

Lesson 4

Topics covered in
this section:

- Navigators
- Procedure Pass
- Releasing orders
- Administering medications

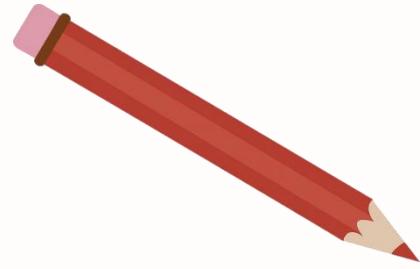
Prepare for Surgery



Prepare for Surgery Overview

Preprocedure documentation commonly includes:

- Releasing held orders for use in the Preprocedure phase of care.
- Reviewing allergies, home medications, history, implants, and consents.
- Completing NPO/Void and head-to-toe assessments.
- Recording vitals.
- Placing LDAs such as a peripheral IV.
 - LDA stands for lines, drains, and airways. In Epic, LDAs also include tubes and wounds.



Write It Down!

Procedure Pass is...

a pre-surgical task list, personalized to each patient and procedure, used to confirm that all pre-surgery tasks are complete.



Exercise Time!

- 1) Exercise: Complete Documentation in the Preprocedure Navigator
- 2) Exercise: Administer a Medication
- 3) Exercise: Verify Preprocedure Documentation
- 4) Beyond the Basics: Explore Navigator User Settings

Remember, you can work on optional activities now or later!

Lesson 5

Topics covered in
this section:

- SmartForms
- Inventory items
- Surgical resources
- Additional
intraprocedure
documentation

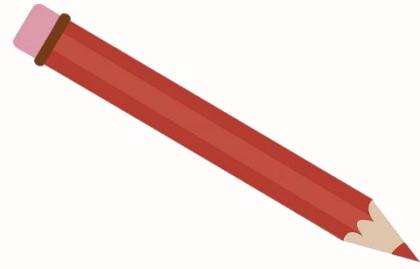
Document Surgery



Document Surgery Overview

Intraprocedure documentation includes:

- Counting sponges, needles/sharps, and instruments before, during, and after surgery.
- Documenting the preparation of the surgical site.
- Performing surgical timeouts.
- Documenting use of inventory items such as supplies and implants.
- Documenting surgical resource use, such as staff, equipment, and instruments.
- Documenting the collection of specimens.



Write It Down!

Surgical inventory items are...

single-use items, such as supplies and implants, used during surgery.

Preference cards...

define a surgeon's preferences for a procedure at a location.



Exercise Time!

- 1) Exercise: Document Surgical Resources
- 2) Exercise: Explore More Intraprocedure Documentation
- 3) If You Have Time: Verify Intraprocedure Documentation
- 4) Beyond the Basics: Create an Intra-op Macro

Remember, you can work on optional activities now or later!

Document Your Findings!



Staff	Equipment	Instruments
<ul style="list-style-type: none">• Staff roles needed for surgery• Must be tracked individually• Examples: circulator, scrub person, CRNA, etc.	<ul style="list-style-type: none">• Machinery needed for surgery• Usually tracked individually• Examples: C-Arm, ESU, etc.	<ul style="list-style-type: none">• Tools needed for surgery• Usually NOT tracked individually• Examples: forceps, scalpels, etc.

Lesson 6

Recover from Surgery

Topics covered in
this section:

- Devices
- Flowsheets
- Preference lists



Recover from Surgery Overview

PACU documentation includes:

- Monitoring vitals using devices.
- Assessing surgical incisions.
- Performing assessments.
- Placing orders.

Phase II documentation includes:

- Removing LDAs.
- Returning patient belongings.
- Reviewing postprocedure care instructions.
- Reconciling medications and orders.

Flowsheets

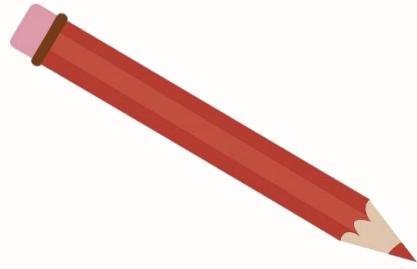
Template
A collection
of related
groups and
rows.

Group
A collection of
related rows.

The screenshot shows the Flowsheets application interface. At the top, there's a navigation bar with tabs: File, Add Rows, LDAAvatar, Cascade, Add Col, Insert Col, Data Validate, and Hide Device D. Below the navigation bar, the template name 'PACU' is circled in red with an arrow pointing from the 'Template' definition above it. The main area is titled 'Flowsheets' and shows a list of sections: Vital Signs, Pain Assessment, Oxygen Therapy, Patient Observation, Modified Aldrete, ACU Interventions, Neurological Assessment, Respiratory Interventions, Cardiac, HEENT, Peripheral Vascular, and Integumentary. The 'Vital Signs' section is expanded and highlighted with a red box. It contains sub-sections: Temp, Temp Source, Heart Rate, Heart Rate Source, Resp, BP, BP Location, BP Method, and Patient Position. The 'Temp' row is also highlighted with a red box. To the right of the main list, there's a sidebar with a 'Consult from 7/...' button, the date '7/12/18', and the ID '1628'. At the bottom of the list, there are two more sections: Pain Assessment and Oxygen Therapy.

Section	Sub-Section	Value
Vital Signs	Temp	36.9 (98.4)
	Temp Source	
Vital Signs	Heart Rate	78
	Heart Rate Source	
Vital Signs	Resp	
	BP	
Vital Signs	BP Location	120/80
	BP Method	Le arm
Vital Signs	Patient Position	Sitting
Pain Assessment		
Oxygen Therapy		

Row
Individual
pieces of
documentation.



Write It Down!

A preference list is...

a preconfigured list of orders specific to a user or a group of users.



Exercise Time!

- 1) Exercise: Place Recovery Orders
- 2) Exercise: Verify PACU Documentation
- 3) If You Have Time: Craft Your User Preference List
- 4) If You Have Time: Complete Phase II Documentation

Remember, you can work on If You Have Time exercises now or later!

Lesson 7

Topics covered in this section:

- Charge review
- Triggering and posting charges

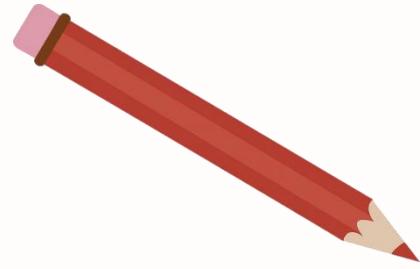
Charge for Surgery



Charge for Surgery Overview

Examples of problems a charge poster may encounter in a log include:

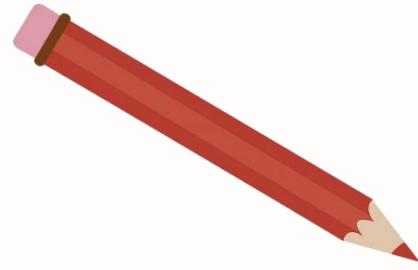
- Missing or conflicting case tracking events.
- Chargeable supplies that result in a zero-dollar charge.
- Implants missing documentation.
- Logs missing a specified hospital account.



Write It Down!

Surgical charges can be generated based on documentation of...

- Surgical inventory, including an item's wasted reason or implant action.
- Case tracking events, for time-based resources such as time spent in the OR and in the PACU.
- Anesthesia events, agents, and supplies.



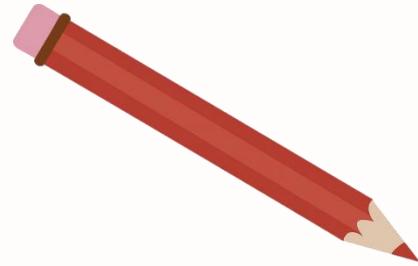
Write It Down!

Triggering charges...

- Submits all charges that won't generate warnings for the billing office to the [Charge Router](#), Epic's tool for communicating charge information from the clinical system to the billing system.
- Keeps the log [open](#) for additional documentation.

Posting a log...

- Submits all charges to the charge router.
- [Closes](#) the log.
- Any further updates to the log require an [addendum](#).



Write It Down!

Charge Name	Number of Charges
Clip Ligation Titanium Medium Large 6	1
Glove Surgical Latex Powder-Free Size 6	1
Mesh Prolene Soft	2
Room (OR##)	19



Exercise Time!

- 1) Exercise: Update Log Documentation to Resolve Errors
- 2) If You Have Time: Explore Report Modifications

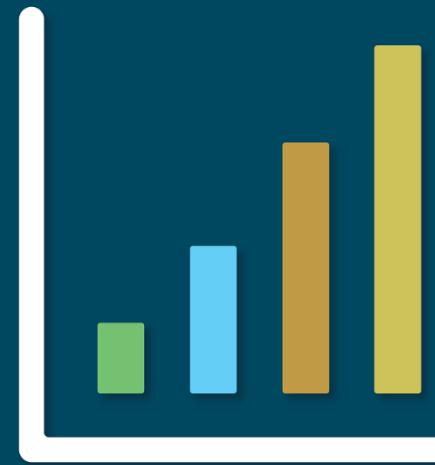
Remember, you can work on optional activities now or later!

Lesson 8

Reporting in OpTime

Topics covered in this section:

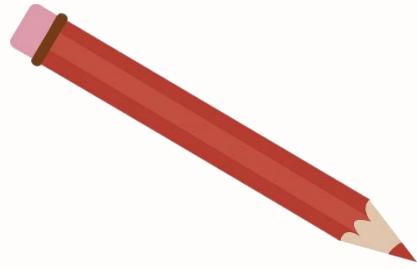
- Application reports
- Informational reports
- Reporting Workbench
- SlicerDicer



Reporting in OpTime Overview

Reporting helps you achieve a wide range of goals including:

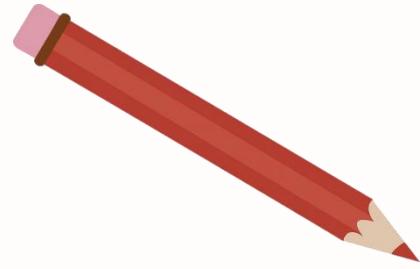
- Provide a tool to complete a workflow,
- Assist a user in identifying gaps that need correction,
- Uncover trends across your surgery patient population,
- ...and more!



Write It Down!

Reporting is the process of...
collecting and summarizing information.

Report Type	Scope and Data Set	Goals	Epic Tools
Operational	Short-term Small, usually only one data source	<ul style="list-style-type: none">Support day-to-day workflowsHelp users make informed decisionsProvide a snapshot of data	<ul style="list-style-type: none">Application reportsInformational reportsReporting Workbench
Analytical	Long-term Large, usually multiple data sources	<ul style="list-style-type: none">Identify trends across a populationMake predictions about the futureGuide decision-making	<ul style="list-style-type: none">SlicerDicer



Write It Down!

SlicerDicer is...

a self-service reporting tool that allows users to analyze large populations of patients.



Beyond the Basics Activities

- 1) Beyond the Basics: SlicerDicer Tutorial
- 2) Beyond the Basics: Explore Operational Reports

Remember, you can work on optional activities now or later!



After-Class Next Steps

Lesson 9

Homework: Lab Exercise

- Topics covered in this section:
 - Consult Office Visit
 - PAT Call
 - Case Scheduling
 - Admission
 - Preprocedure
 - Intraprocedure
 - PACU
 - Phase II
 - Charging



Appendix A

Additional Epic Resources

- This appendix will point you to various guidelines, resources, and steps to continue your learning.

Epic UserWeb

Forums Galaxy Nova Sherlock Community Library Training Home Show All ▾

Epic University Voyager Card



AI

Important Dates

Completing a track? See what version is available on your desired testing date. Once completed, the exam or project can be used to complete a new track until the expiration date listed below.

If you are testing on a different version than what you were trained on, review the [change log](#).

Taking an exam? Exams must be requested at least 7 days in advance.

Exams:	Available On	Last Day to Order	Last Day to Complete	Expires
--------	--------------	-------------------	----------------------	---------

Your Completed Certificates

Training Resources

- Training Coordination
 - Course Catalog / Train Tracks
 - Community Members Training Guide
 - Consultant Training Guide
 - Consultant Certificate Profiles
 - Exam Proctors
- Certificate Resources
 - Class Registration Form
 - Cert Environment Request
 - Cert Env Access & Foundation Hosted



Appendix B

Complete Your Training Track

The information we are about to discuss is also in this appendix.

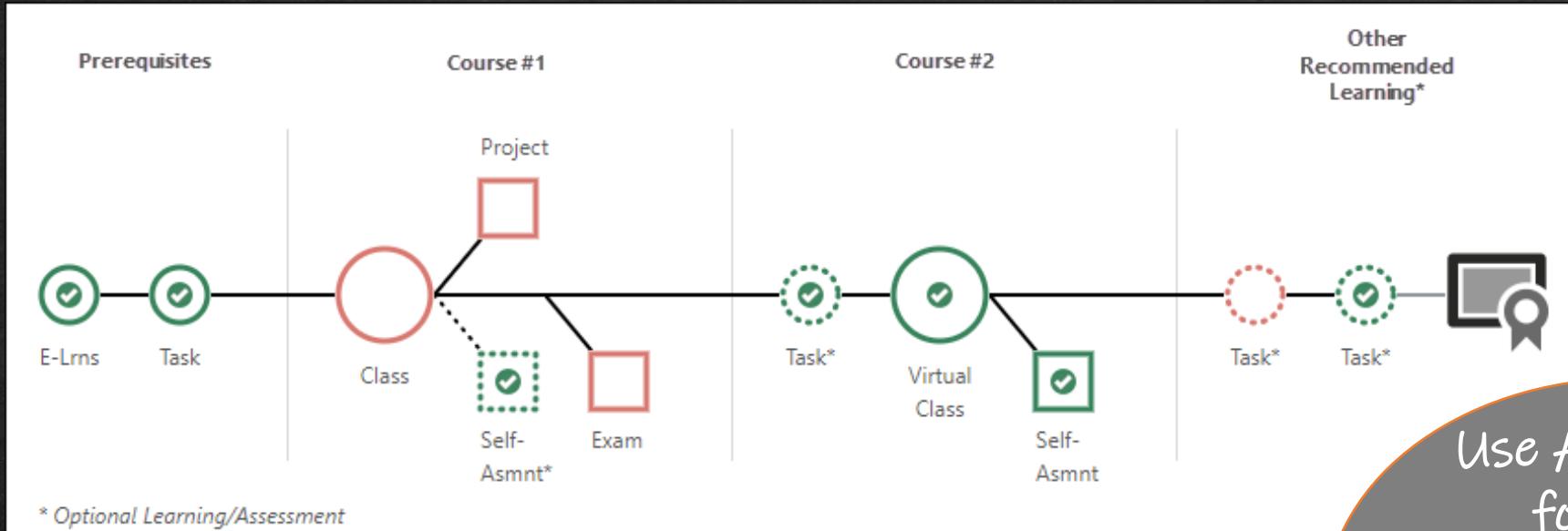
The only assessment you have for this class is the **OpTime Fundamentals Self-Assessment** which is:

- Unproctored, untimed
- Unlimited attempts to pass, but only two submissions per day.



Track Your Progress in EpicU

Training Home > Your In-Progress Certificates > Select your Train Track



Solid line = Required
Dotted line = Optional
Check mark = Completed

Use Appendix B
for more
information on
tracking and
completing
requirements.

Click on a requirement in the diagram or scroll down for more details.

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