Procedure Title:	Central Zone Perioperative Services – Advanced Booking Policy for Elective Surgical Cases		
Applied To:	All Surgical Departments (some exceptions apply)		
Location Applicability:	Central Zone		
Governing Policy:			
Approved:	**Effective:**	**Next Review:**	
June 27, 2024	July 8, 2024	August 8, 2024	
Sponsor:	Director, Perioperative Services Network		
Approval Authority:	Director, Perioperative Services Network		
Number: n/a		**Manual:**	Perioperative Services

EXECUTIVE SUMMARY

This Standard Operating Procedure (SOP) outlines that:

- **Elective patients at the Victoria General Hospital (VG) and Halifax Infirmary (HI) must be booked in Novari *a minimum of 14 calendar days* before the scheduled date of surgery. Elective patients at Dartmouth General Hospital (DGH) and Hants Community Hospital (Hants) must be booked in Novari *a minimum of 28 calendar days* before the scheduled date of surgery**. This will allow sufficient time to arrange clinic appointments, consults, and investigations.
- If a surgeon's office does not have a full list of patients booked in Novari *a minimum of 14 days (VG & HI)/28 days (DGH & Hants)* ahead of their scheduled block, **the Surgeon's block time will be released and re-assigned. Patients currently booked will be cancelled by the surgeon's office, exceptions apply to specific services.**
- If a patient's surgery date is unknown but the surgeon plans to operate on the patient within the next three months, **the patient should be booked in Novari as early as possible, using December 25th as the surgical date**. By utilizing 'Christmas Day Booking', patients can be assessed in the Preoperative Anesthesia Clinic and prepared for their upcoming surgery without a predetermined surgical date.

PURPOSE

Advanced booking processes can vary and are not consistently followed by surgeon offices. Last minute bookings can result in case delays, late starts, and same day cancellations, often due to patients not being seen in the Perioperative Anesthesia Clinic. The purpose of this SOP is to ensure surgeons' offices

are following appropriate advanced booking practices, such that all elective surgical candidates can receive appropriate preoperative care, to improve perioperative efficiency and maximize OR utilization.

PRE-REQUISITES

Documentation Required for Surgical Booking

- **Consent for Investigation, Treatment or Operative Procedure** *or* **No Consent with Booking Package**
  - Valid for 6 months
- **Preoperative Health History Questionnaire** (complete with list of the patient's medications)
  - Valid for 12 months
- **Clinic Note/History & Physical** *or* **Stat Dictation Pending**
  - If the timeline from the surgical clinic visit and the proposed OR date will be less than four weeks, please dictate the clinical visit as a stat dictation and use *Stat Dictation Pending* to ensure rapid booking in Novari.

DEFINITIONS

Perioperative Anesthesia Clinic (PAC): The PAC is responsible for providing education, arranging investigations, and optimizing patients for surgery. Ensuring a PAC visit helps to minimize last minute cancellations and OR delays, as well as reduce hospital length of stay and perioperative morbidity and mortality. **Ideally, the PAC will receive OR bookings for elective cases at least 4-6 weeks in advance of the patient's operation.** Anesthesia consults are valid for three months.

'Christmas Day Booking': Patients can be booked in Novari and assessed in the Perioperative Anesthesia Clinic and prepared for an upcoming surgery **without a predetermined surgical date.** 'Christmas Day Booking' refers to scheduling patients in Novari with an OR date of 'December 25$^{th'}$. This signifies to Booking Officers that an OR date is not currently confirmed, but the surgeon plans to operate on the patient within the next three months. Once a surgical date is known, the surgeon can update the OR date in Novari. 'Christmas Day Bookings' can be helpful to improve efficiency, optimize OR utilization and enhance patient care in a variety of circumstances:

- This approach can be used to create a roster of patients that are fully assessed and prepared for surgery in the event of a last-minute cancellation. Surgeon's offices should maintain a list of patients who have had a PAC visit without a surgical date (December 25th booking) and are ready to be substituted in the event of cancellation, optimizing OR utilization.
- Extending the timeline between being seen in the PAC and surgery can help to optimize patients ahead of surgery (e.g., a patient that is found to have a high A1C in the PAC, can be referred to a Registered Dietitian for diabetes management - controlling blood sugar can improve patient outcomes and reduce risk of same day cancellations)
- 'Christmas Day Bookings' can also help to flag day-of-surgery resourcing needs (e.g., a patient that is found to have sleep apnea in the PAC, can receive CPAP education and the need for a MASIMO bed can be flagged to perioperative staff in advance, reducing holds in PACU on the day of surgery)

Fully Booked OR List: For the purposes of this SOP, a fully booked OR list is defined as 75% booked target (per the Novari surgical block calendar, 10 hour rooms would be booked except for 2.5 hours and 8 hour rooms booked except for 2 hours – these values are in line with the C3 Surgical Tile targets) at least 14

days (VG & HI)/28 days (DGH & Hants) in advance. This metric is determined by dividing the total time booked by the total time allocated in a block.

Exceptions are as follows:

- **Ophthalmology is exempt** from the advanced booking procedures at this time as there is no impact to the PAC or reallocation to other services. Physicians are *encouraged* to submit cataract bookings at least 14 days in advance.
- **Cardiac Surgery is exempt** from the advanced booking procedures at this time due to current practice model of patient selection for surgery.
- **Vascular surgery is required to have a minimum of 1 elective case/procedure booked** at least 14 days in advance/per scheduled OR/procedure room.
- **Neurosurgery (excluding spine) is required to have at least 50% of their OR block booked** at least 14 days in advance.
- **Oncology practices are required to have at least 50% of their OR block booked** at least 14 days (VG & HI)/28 days (DGH & Hants) in advance.

All other services and surgeons not mentioned above are expected to comply with the 14 days (VG & HI)/28 days (DGH & Hants) advanced booking requirement of 75%.

Elective Cases: For the purposes of this SOP, please consider 'elective cases' to be those that are non-urgent (postponing will not cause harm within reason) and can be booked at least 14 days in advance.

Waitlist Cases: For the purposes of this SOP, please consider 'waitlist cases' to be those that are urgent (postponing may cause harm) and cannot be booked 14 days in advance.

PROCEDURE

This procedure ensures that elective surgical patients are booked in Novari a minimum of 14 days before their scheduled date of surgery at the VG and HI and a minimum of 28 days for DGH and Hants. This enables the completion of investigations or consults required, such that patients are prepared for their procedure on the day of surgery.

Seq. No.	Task Description	Role
1.	Patient is identified as an elective surgery candidate.	Surgeon
1.A.	During initial consultation, ensure that the patient (or substitute decision maker) **has completed and signed** required documentation.	Surgeon
1.B.	During initial consultation, flag any relevant patient information that may impact patient flow through perioperative services on the day of surgery (e.g., known difficult intubation, hearing impaired, interpreter needed, mobility issues, etc.), as well as required equipment and diagnostic imaging resources.	Surgeon
1.C.	If applicable, provide the patient with the S*urgery Specific Patient Education Booklet*, such that they can bring any general preoperative questions they	Surgeon

	may have to the PAC. Surgeons should answer procedure-specific questions during the consult.	
2.	The Surgeon provides their Administrative Staff with all information required to book the patient in Novari. Documentation must include: - *Consent for Investigation, Treatment or Operative Procedure* or *No Consent with Booking Package* - *Preoperative Health History Questionnaire* (complete with list of the patient's medications) - *Clinic Note/History & Physical* or *Stat Dictation Pending*	Surgeon
2.A.	The Surgeon's Office will book the patient in Novari ***a minimum of 14 days* before their scheduled date of surgery at the VG and HI, and *a minimum of 28 days for DGH and Hants*** in advance of the scheduled surgery date. **Bookings that are submitted with incomplete or out of date documentation will not be processed**. It is the responsibility of the Surgeon's Office to ensure that the required documents are complete and up-to-date. All information entered into Novari is time-stamped with the time the document is uploaded. The surgical booking officers are notified of any changes.	Surgeon's Office
2.B.	Due to different surgery types and characteristics, certain surgical services/specialties may be able to plan their surgery schedule farther ahead than others. A '48 Hour Rule' applies to **Cardiac, Neuro (non-spine), and Vascular services only**, in which these services are expected to have at least 50% of their patients booked at least 14 (VG & HI)/28 (DGH & Hants) days in advance, and 50% may be booked within 48 hours.	Surgeon
2.C.	**If a patient's surgery date is unknown, patients can be booked in Novari using December 25th as the surgery date**. 'Christmas Day Bookings' signify that an OR date has not been confirmed, but the surgeon plans to operate on the patient within the next three months. Once a surgical date is known, the OR date is to be updated in Novari. Further details are included above under definitions.	Surgeon's Office
3.	If a surgeon does not have patients booked in Novari, with a complete booking package *16 (VG & HI)/30 (DGH & Hants) days* ahead of their scheduled block, a Booking Officer will email the Surgeon's Office, Surgeon, Department/Division Head and OR Manager to inform them that this Surgeon's Office has 48 hours to book cases or time will be reallocated.	Booking Officer
4.A.	By 1400 hours, 15 (VG & HI)/29 (DGH & Hants) days prior to the scheduled block, a Booking Officer will email a notice to all Department/Division Heads with the current unfilled OR time to be reallocated.	Booking Officer
4.B.	**If a surgeon does not have at least 75% of their block booked (with the exception of Cardiac, Neuro (non-spine), Vascular, and ophthalmology**	Surgical Department/

	services and oncology practices) in Novari 14 days (VG & HI)/28 days (DGH & Hants) ahead of their scheduled block, the respective Department/Division Head will call the surgeon to notify them that their OR time has been released and will be re-assigned to another surgeon.	Division Head
5.	The respective OR Manager will reassign the OR block time to another surgeon. **Priority will be given to surgeons who have patients booked into Novari in advance** using the 'Christmas Day' booking and have fully booked their allocated OR blocks at least 14 (VG & HI)/28 (DGH & Hants) days in advance**. Wait time targets may also be taken into consideration when reassigning OR time.**	OR Manager

VERSION HISTORY

Version:	**Effective:**	**Approved by:**	**What's changed:**
Original	June 6, 2024	Director, Perioperative Services Network	N/A
Version 2	June 27, 2024	Director, Perioperative Services Network	Changes made for - Oncology practices - Ophthalmology - Cardiac Surgery - Vascular Surgery - Additionally, the effective date has been adjusted by two weeks