Northern Light Health

From the Office of Clinical Informatics

Quick Reference Guide (QRG)
SurgiNet – Case Selection

October 7, 2021

This Quick Reference Guide (QRG) reviews the Case Selection process.

Common Buttons & Icons

Case Selection	**Case Selection** button
Location	**Location** icon
Associate Encounter	**Associate Encounter** Case Selection link
Change Add-On Status	**Change Add-On Status** Case Selection link

➢ Selecting a Case for Review

➢ From the Perioperative Tracking board:

STEP 1: Click **Case Selection** using the top toolbar.

STEP 2: Click **Location**.

STEP 3: Click the needed location within the Location Selection window.

NOTE: Use the + icon to open more specific locations.

STEP 4: Click **OK**.

STEP 5: Click the appropriate radio button for how you want to search. Date is selected by default.

STEP 6: Enter the Criteria information.

STEP 7: Click **Retrieve**.

NOTE: To refresh the list click Retrieve again. The Refresh icon will not work in this instance.

STEP 8: Select the case needed from the list of search results.

Associate an Encounter

➢ From the Case Selection search results:

STEP 1: Click the patient's case that you want to associate the encounter to.

STEP 2: Click **Associate Encounter**.

STEP 3: Click **Re-select** in the Associate Encounter pop-up window.

STEP 4: Double-check the FIN against the patient wristband to ensure accuracy.

STEP 5: Click the encounter you want to associate.

STEP 6: Click **OK**.

Change an Add-On Status

➢ From the Case Selection page:

STEP 1: Follow facility policy before using this functionality.

STEP 2: Click **Change Add-On Status** .

STEP 3: Make changes as appropriate.

Print

➢ From the Case Selection page:

STEP 1: Click **Print**.

STEP 2: Click **Document** or **Pick List**.