Duke Spine Center - Pre-operative Anemia Workflow Diagram 3-8-2016

Site of Service

**START**
- Patient sees provider; patient is offered surgery and is interested
  - Yes
    - Screening nurse reviews patient history in EPIC, Nurse looks for Hb results in the last 3 months, if Hb results are not recorded nurse performs Hemocue test. Nurse fills the Preliminary Risk Assessment Screening.
    - Yes
      - Meets criteria for anemia treatment based on hemoglobin, gender and type of surgery planned?
      - Yes
        - Surgical procedure planned and scheduled at discretion and convenience of patient and surgeon
      - No
        - Discussion between patient and screening nurse about 1) importance of anemia management **even if it may delay surgery**, referral to PCP 2) introduction of pre-op anemia mgmt program/what to expect 3) AVS provided to patient

- No
  - If Pt does not schedule surgery
    - Screening nurse performs Hemocue test on patient and or checks Hb in EPIC. When Pt calls back, nurse schedules surgery and continues workflow
  - Patients not screened on the same day: Nurse contacts patient at later time, reviews Hb in EPIC schedules surgery and continues workflow

**Preoperative Screening 2D**
- PAT clinic activates lab appointments (Front Desk)
  - Laboratory studies drawn
    - Laboratory studies results back/interpreted, patient contacted via phone call to prepare for treatment, request for infusion center appointment (CBC)

- Request of patient approval and insurance information. Patient scheduled for Anemia Clinic visit AND first Infusion Center appointment by CBC staff assistant (tentative order for 4 weekly epo + iron infusions)
  - Patient evaluated in Anemia Clinic (2D); second hemocue test done to check Hgb levels; type of infusion determined, Infusion Center (2A) templated therapy plan filled out (with CC to surgeon and nurse), and future infusion appointments made by (CBC)

- Follow-up on patient referral to PCP for anemia diagnosis
  - Communication to Duke Spine Center to schedule surgery (CBC)*

**Anemia Clinic and Infusion Center Clinic 2D and 2A**
- Referral to Heme/OncCommunication to nurse by Aime Grimsley/Ron Olson
  - Yes
    - Referral to Heme/Onc
      - Duke Clinic 2D
      - 30 Duke Medicine Circle
    - Duke Clinic 2A
    - 30 Duke Medicine Circle
  - No
    - Evidence of severe disease requiring referral to Heme/Onc?
      - Yes
        - Referral to Heme/Onc
          - Duke Clinic 2D
          - 30 Duke Medicine Circle
      - No
        - Laboratory studies ordered by screening nurse, using Epic order set (CBC, ferritin, iron, iron saturation, TIBC, reticulocyte count, B12, folate, creatinine). Order set includes an "anemia-NOS" diagnosis code Z13.0. Patient added to patient list. Surgery scheduled in 6 weeks

**Notes:**
* Determination of earliest surgical date takes into account possibility of non-response to IV iron therapy with need to switch over to erythropoitin pathway
** Please see separate Pre-op Anemia Clinic Testing and Treatment Protocol for details