



# The Implementation of Care Companion: A Task Based System to Prepare Patients Prior to Surgery

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## Background & Introduction

- Patient education prior to the day of surgery is paramount to success. The authors recognized the lack of standardized preparation for surgical patients. Prior to implementation, patients were given fragmented education (paper, electronic, or lack thereof) on how to prepare for the day of surgery. This led to poor patient experience, delays on the day of surgery, and poor clinical optimization.

## Objectives

- The objective of this project was to design a task-based manager for patients, in partnership with PennChart (Penn Medicine's electronic health record).
- This would deliver time based tasks directly to the patient's portal regarding medication management, enhanced recovery after surgery protocol, skin prep, and review of day of surgery expectations. Patients can access their portal via web browser or their cellular device.
- This gave patients a one stop shop to better prepare for surgery and allow the end user clinicians to monitor progress. The pilot population was started with the orthopedic specialty.

## Process of Implementation

- Perianesthesia leaders partnered with EPIC analysts and provider leadership within the orthopedic office to design the content based on existing documentation.
- The team worked together for several months to design the content and timelines for the task-based software and were able to have a successful go live in June 2025.

Name	Frequency	Next Due Date	End Date
Start Iron Supplement	Once	No next due date	6/10/2026
Stop taking Aspirin and Anti-inflammatory medications	Once	No next due date	6/23/2026
MPM PAH Pre-Op Management of diabetes, weight loss, and heart failure medications	Once	No next due date	6/23/2026

**MPM PAH Pre-Op Management of diabetes, weight loss, and heart failure medications**

**Patient-Friendly Description**  
 If you are on insulin therapy, this will be reviewed at your prep optimization appointment or you can contact your prescriber for adjustment for surgery

**\*STOP ONE WEEK before your surgery the following medications:** Invokana, Invokamet, Invokamet XR, Farxiga, Xigduo XR, Qtern, Qternmet XR, Jardiance, Synjardy, Synjardy XR, Civamba, Triajardy, Steglujan, Steglujanmet, Steglujan, Mounjaro, Trulicity, Bydureon, Byetta, Ozempic, Wegovy, Victoza, Saxenda, Adlyxin, Rybelsus, Zepbound/Tirzepatide

**For all other diabetes medications:**  
 -THE NIGHT BEFORE SURGERY: Take your oral medication as you usually do.  
 -THE MORNING OF SURGERY: NO ORAL DIABETES medications on the day of surgery  
 -THE MORNING OF SURGERY if you are taking insulin: Do not take your normal dose. Please contact your prescribing physician and ask for advice.

Please contact your surgeon's office if you have questions about stopping medications.

Generic Name	Brand Name	Generic Name	Brand Name
Canagliflozin	Invokana <sup>®</sup>	Tirzepatide	Mounjaro <sup>®</sup>
Canagliflozin/Infliximab	Invokamet <sup>®</sup>	Dulaglutide	Trulicity <sup>®</sup>
Canagliflozin/Infliximab XR	Invokamet XR <sup>®</sup>	Eraneride extended release	Byetta <sup>®</sup>
Dapagliflozin	Farxiga <sup>®</sup>	Eraneride	Byetta <sup>®</sup>
Dapagliflozin/Infliximab XR	Farxiga XR <sup>®</sup>	Saxagliptin	Ozempic/Wegovy <sup>®</sup>
Dapagliflozin/Infliximab XR	Farxiga XR <sup>®</sup>	Liraglutide	Victoza/Saxenda <sup>®</sup>
Dapagliflozin/Infliximab XR	Farxiga XR <sup>®</sup>	Lixianetide	Adlyxin <sup>®</sup>
Dapagliflozin/Infliximab XR	Farxiga XR <sup>®</sup>	Saxagliptin	Rybelsus <sup>®</sup>
Dapagliflozin/Infliximab XR	Farxiga XR <sup>®</sup>	Qternmet XR	
Dapagliflozin/Infliximab XR	Farxiga XR <sup>®</sup>	Jardiance <sup>®</sup>	
Dapagliflozin/Infliximab XR	Farxiga XR <sup>®</sup>	Synjardy <sup>®</sup>	
Dapagliflozin/Infliximab XR	Farxiga XR <sup>®</sup>	Synjardy XR <sup>®</sup>	
Dapagliflozin/Infliximab XR	Farxiga XR <sup>®</sup>	Civamba <sup>®</sup>	
Dapagliflozin/Infliximab XR	Farxiga XR <sup>®</sup>	Triajardy <sup>®</sup>	
Dapagliflozin/Infliximab XR	Farxiga XR <sup>®</sup>	Steglujan <sup>®</sup>	
Dapagliflozin/Infliximab XR	Farxiga XR <sup>®</sup>	Steglujanmet <sup>®</sup>	
Dapagliflozin/Infliximab XR	Farxiga XR <sup>®</sup>	Steglujan <sup>®</sup>	

**PAH PRE-OP PREVENT INFECTION**

You have three packs of wipes. Each package has two wipes.  
 - You will use all six wipes.  
 - Open package  
 - Use each wipe at the numbers listed below. For example, the second wipe will be used on your arms.  
 - Wipe the areas in a circular or back and forth motion. Make sure to wipe all parts of the skin.  
 Do not rinse or "dry off" with a towel. Let it air dry. Your skin will feel sticky. \*Be sure skin is completely dry and cool.  
 The goal is to get the most CHG on your skin as possible.  
 Keep the cloths away from your eyes, ears, and mouth.

**To Open Package: Tear package a notch on back flap**

## Statement of Successful Practice

- Since go live in June 2025, 832 patients have been enrolled in the Pre-Op Total Hip and Total Knee Care Companion Program
- **Overall Patient Experience:**
  - Helpful For Surgery Prep – 91%
  - Time Worthwhile – 88%
  - Overall satisfaction – 90%
  - Would Recommend – 93%
- **80% of patients** reported improved medication understanding
- Patients reported that content level is well-balanced
- **Opportunities for improvement:**
  - Continue to encourage patients to enroll and have active MyChart Participation.

## Implications for Advancing the Practice of Perianesthesia Nursing

- Care Companion provides a digital solution for pre-procedure instructions.
- This innovative solution complements existing patient education materials, enhancing resources already developed across surgical service lines.
- Many patients rely on their smartphones daily, making mobile-delivered education both easily accessible and directly relevant to their surgical care.