

**SELF- GUIDED PRACTICE WORKBOOK [40]**  
CST Transformational Learning

WORKBOOK TITLE:

**Perioperative: Materials Management/MDRD**

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## # SELF-GUIDED PRACTICE WORKBOOK

<b>Duration</b>	<b>1 hour</b>
<b>Before getting started</b>	<ul style="list-style-type: none"> <li>■ Sign the attendance roster (this will ensure you get paid to attend the session)</li> <li>■ Put your cell phones on silent mode</li> </ul>
<b>Session Expectations</b>	<ul style="list-style-type: none"> <li>■ This is a self-paced learning session</li> <li>■ A 15 min break time will be provided. You can take this break at any time during the session</li> <li>■ The workbook provides a compilation of different scenarios that are applicable to your work setting</li> <li>■ Work through different learning activities at your own pace</li> </ul>
<b>Key Learning Review</b>	<ul style="list-style-type: none"> <li>■ At the end of the session, you will be required to complete a Key Learning Review</li> <li>■ This will involve completion of some specific activities that you have had an opportunity to practice through the scenarios.</li> </ul>

## Using Train Domain

You will be using the train domain to complete activities in this workbook. It has been designed to match the actual Clinical Information System (CIS) as closely as possible.

Please note:

-  Scenarios and their activities demonstrate the CIS functionality not the actual workflow
-  An attempt has been made to ensure scenarios are as clinically accurate as possible
-  Some clinical scenario details have been simplified for training purposes
-  Some screenshots may not be identical to what is seen on your screen and should be used for reference purposes only
-  Follow all steps to be able to complete activities
-  If you have trouble to follow the steps, immediately raise your hand for assistance to use classroom time efficiently
-  Ask for assistance whenever needed

## PATIENT SCENARIO 1 – Access and Set-up

### Learning Objectives

At the end of this Scenario, you will be able to:

- Use Perioperative Tracking to update case cart status

### SCENARIO

A case cart for an elective Radical Nephrectomy needs to be picked. You pick all items with the exception of the Omni Retractor as there is only one within the department and it is currently in use for another case.

As a member of the MDRD you will be completing the following activities:

- Access Perioperative Tracking
- Set Case Cart Events to notify the OR that the **Case Cart is Incomplete** and then the **Case Cart Is Ready**

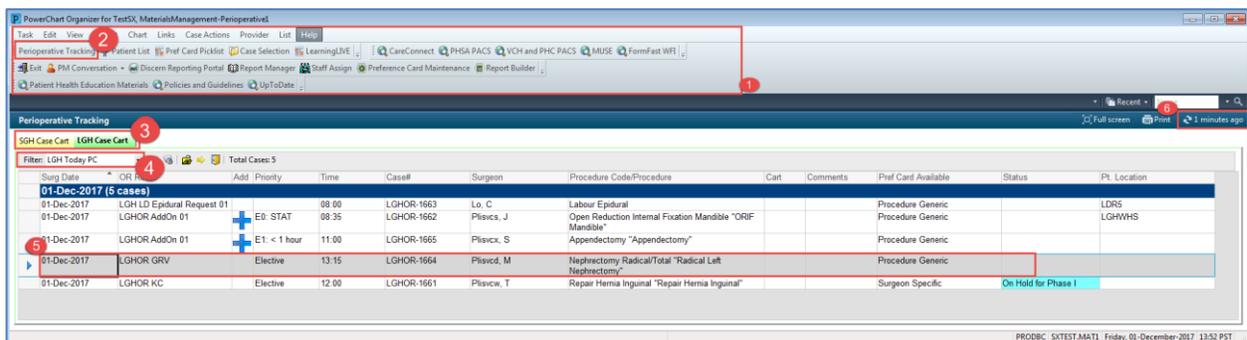
## Activity 1.1 – Access Perioperative Tracking and Tracking View

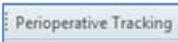
1 Ensure you are logged into Powerchart

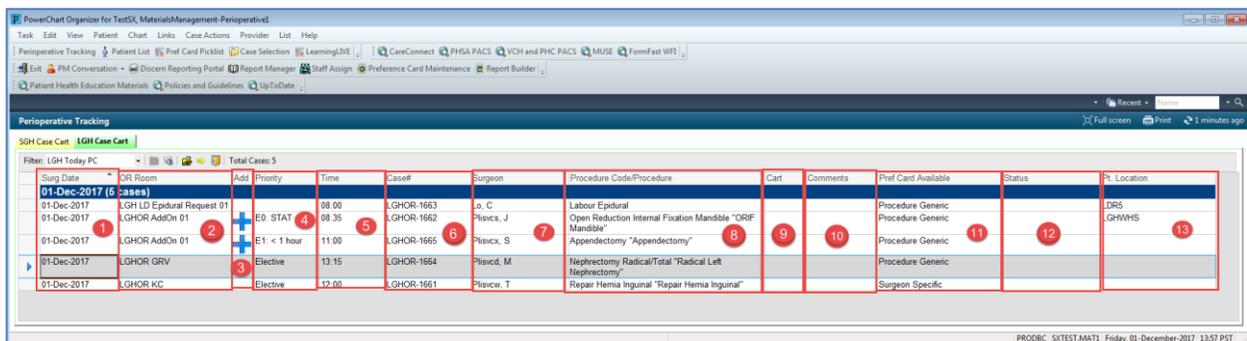
2 When you log into PowerChart it will open to **Perioperative Tracking**.

Perioperative Tracking will display various views (or tabs) depending on your area/login. Perioperative Tracking **LGH Case Cart** view is utilized to view the elective and emergency cases that have been scheduled.

This view acts as a slate, a communication tool, and eliminates the need to search for patients individually.



1. The **Toolbar** contains buttons that allow you to access various tools within the Clinical Informatics System. MDRD will mainly use Perioperative Tracking.
2. Any time you need to navigate back to Perioperative Tracking you can click  from the Toolbar.
3. Cases will display in the **LGH Case Cart** tracking view.
4. The **Filter** allows you to select the desired time frame for data displayed within the Tracking View.
5. Each row within this table represents a patient.
6. **Refresh** – clicking here will refresh the screen. Perioperative Tracking will auto-refresh every 5 minutes.



It is important to note the following information within the Tracking View:

1. **Surg Date** – The date of scheduled procedure
2. **OR Room** – Operating Room where procedure is scheduled to take place
3. **Add** – “+” icon populates the column and indicates if the case is an Add on emergency procedure
4. **Priority** – identifies the case as elective or emergency. If it is an emergency case, the emergency code status will also display.
5. **Time** – The scheduled time of the procedure
6. **Case #** - auto-generated number specific to each patient and case. The most reliable surgical case identifier as patient names are not displayed.
7. **Surgeon** – The surgeon for the case.
8. **Procedures Code/Procedure** – scheduled procedure description.
9. **Cart** – Displays the status of the case cart. (MDRD is responsible for updating this information)
10. **Comments** – The comments section is used to communicate point of time information. The OR Nurses will be able to view your comment. This is an extremely useful tool for MDRD.
11. **Pref Card Available** – type of preference card/pick list the system will pull based on the surgeon and procedure booked.
12. **Status** – status of the patient journey.
13. **Pt. Location** – Current location of the patient.

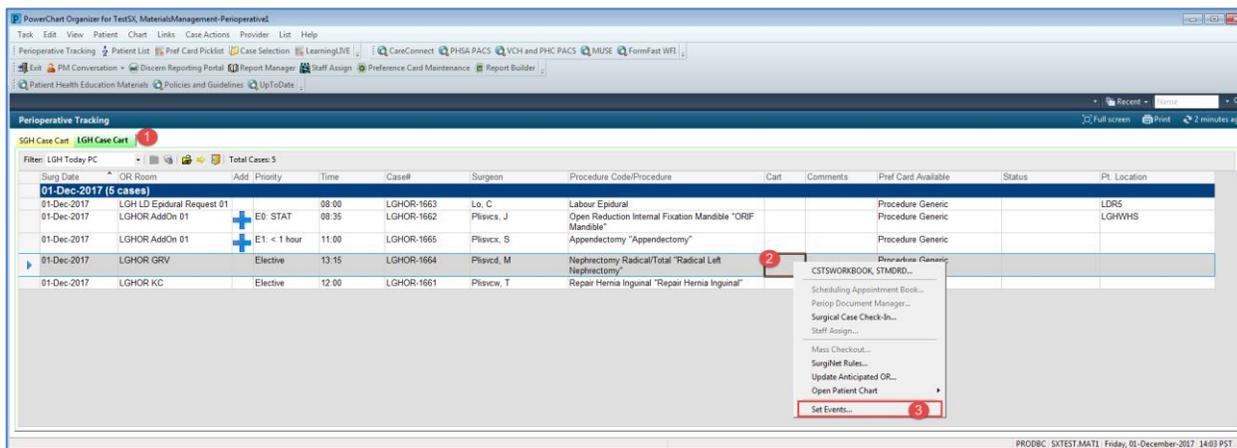
### Key Learning Points

- The Tracking Views represent the equivalent of a paper slate and provide real time case and patient information
- Filters allows you to select the desired time fame for data displayed within the Tracking View

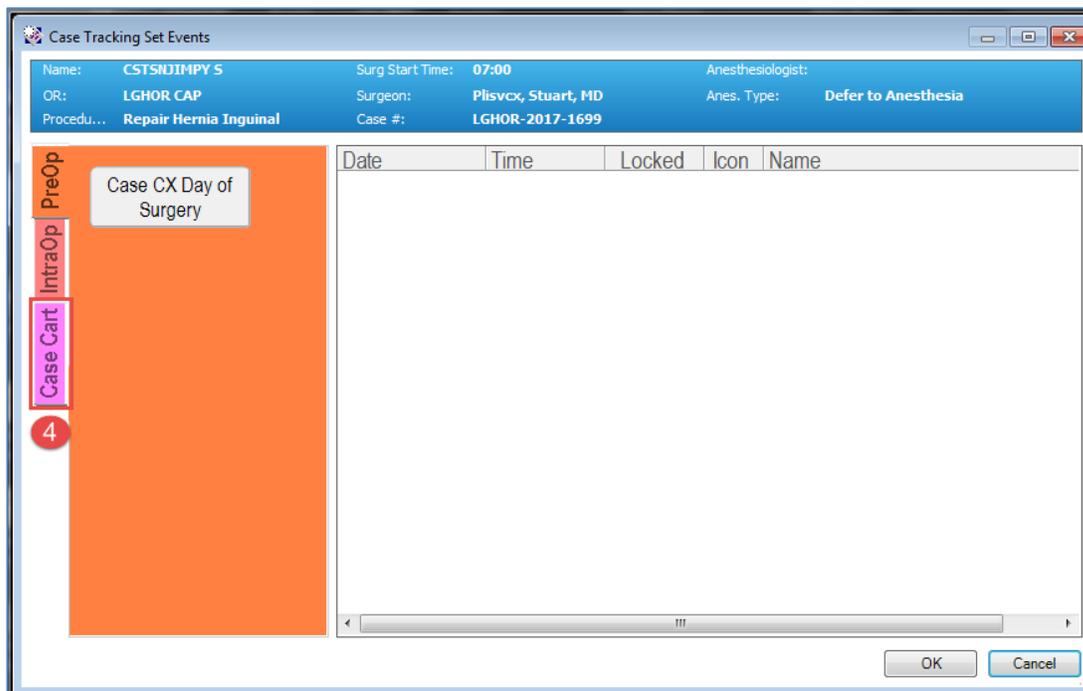
## Activity 1.2 – Setting the Case Cart Event and Add Comments

1 Setting a **Case Cart** event is a form of communication between MDRD and the staff in the OR on the status of the case carts in real time. This functionality is referred to as **Set Events**. The types of events used for MDRD are **Case Cart Not Ready**, **Case Cart Ready**, and **Case Cart Incomplete**. **Note:** This form of electronic communication does not eliminate the need for verbal communication (e.g telephone, intercom or face to face) in elective, emergency or complex situations.

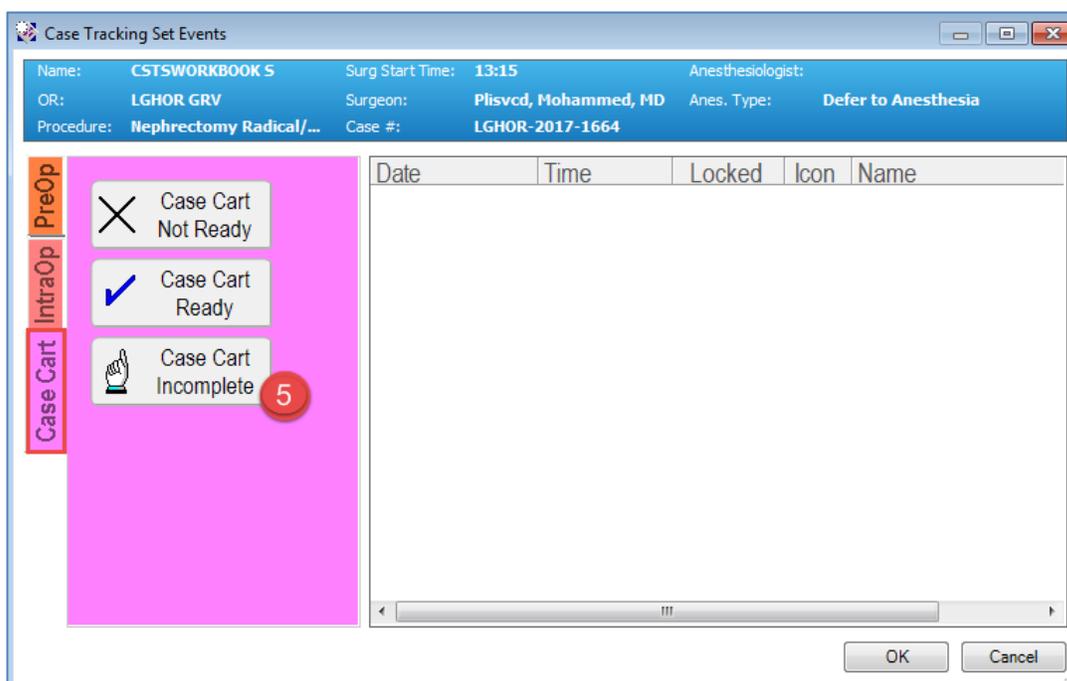
2 Set an event for your surgical case



1. Click on **LGH CASE CART** View
2. Right click on the line with the correct Case #
3. Select **Set Events** from the drop down list.
  - **The Case Tracking Set Events window will display**

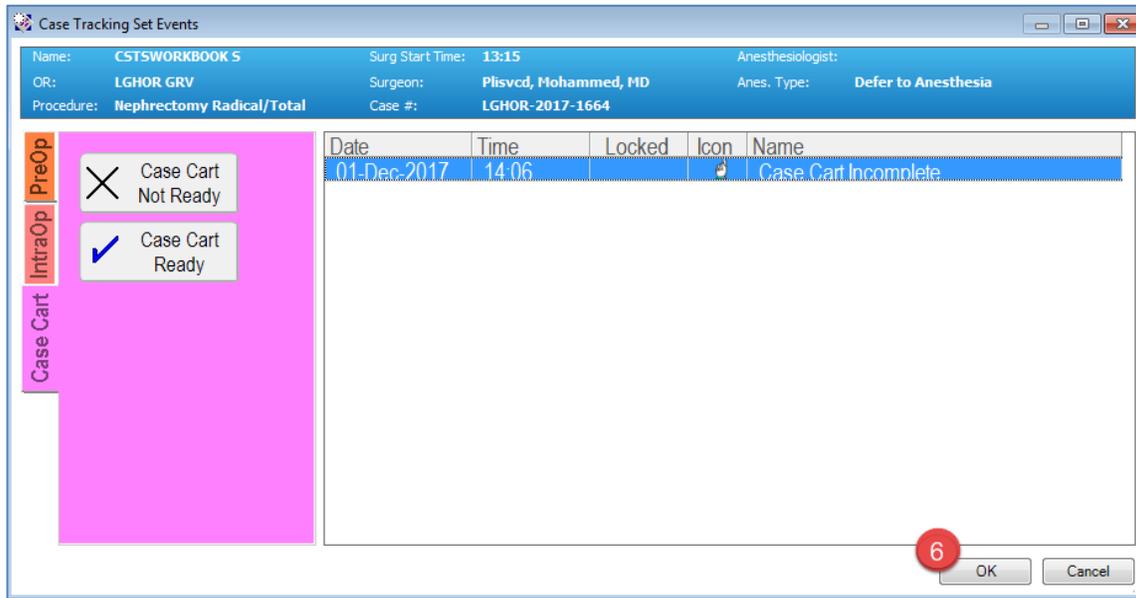


4. Click Case Cart Tab from the left



5. Click **Case Cart Incomplete**

- The **Case Cart Incomplete** icon will disappear from the left window and appear in the right window under the Name column.



6. Click the **OK** button to set the Case Cart event



7. Verify on the **LGH Case Cart Tracking View** that the case cart updated with indicating the **Case Cart is Incomplete**.

### 3 Adding Comments to the Case Cart Tracking View

In the **Comments** column, you can add extra communication to the Operating Room about the Case Cart.



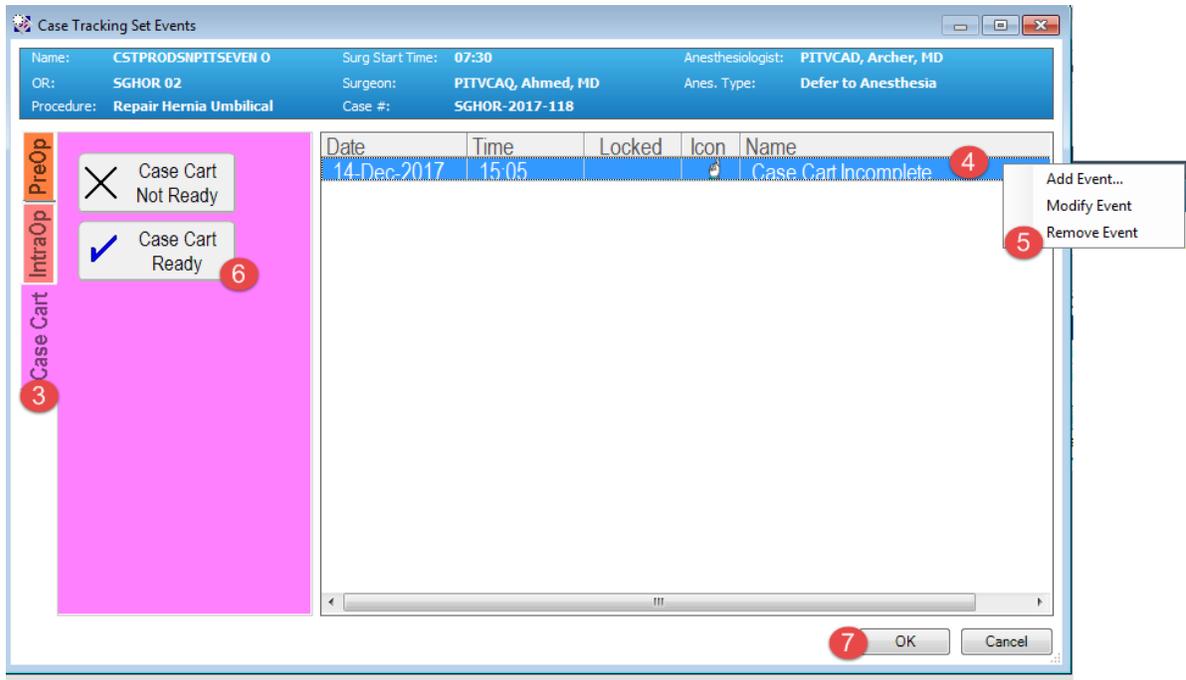
1. Click in the cell of the **Comments** column for your surgical case and Type **Comments = Awaiting Omni Retractor**

**Note:** This comment is now viewable by the OR Nurse on their Tracking View LGH IntraOp

**4 Remove Event**

Now that the Omni Retractor is ready, and the case cart is complete. Update your tracking view to communicate the change in status. First Remove the Event **Case Cart Incomplete**

- Right click on the line with the correct Case #
- Select **Set Events** from the drop down list.
  - The Case Tracking Set Events window will display



3. Click **Case Cart** Tab
4. Right Click on **Case Cart Incomplete**
5. Click **Remove Event**
6. Click **Case Cart Ready**
7. Click **OK**

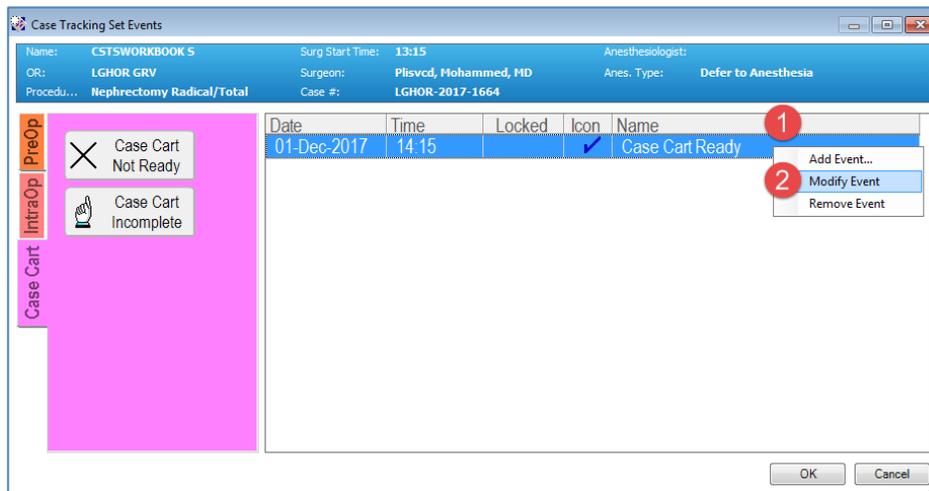
**Note:** Always remove the old event before adding a new event otherwise the tracking view will show both event icons (See Image Below).

Surg Date	OR Room	Add	Priority	Time	Case#	Surgeon	Procedure Code/Procedure	Cart	Comments	Pref Card Available	Status	Pt. Location
<b>31-Oct-2017 (8 cases)</b>												
31-Oct-2017	LGHOR CAP		Elective	07:30	LGHOR-1467	Plisvcw, T	Fasciotomy Lower Extremity "lower left muscle release"			Procedure Generic	Pt. in Phase I	PACU 1 Wait
31-Oct-2017	LGHOR CAT1		Elective	12:30	LGHOR-1470	Godinho, D	Extraction Cataract with Intraocular Lens Insertion "Extraction Cataract with Intraocular Lens"		Note: Both Case Cart Incomplete and Case Cart Ready Icons are displayed	Procedure Generic	Surgery Stop	
31-Oct-2017	LGHOR CAT1		Elective	13:45	LGHOR-1464	Godinho, D	Extraction Cataract with Intraocular Lens Insertion "Extraction Cataract with Intraocular Lens Insertion"			Procedure Generic	Surgery Stop	
31-Oct-2017	LGHOR CAT1		Elective	15:00	LGHOR-1466	Godinho, D	Extraction Cataract with Intraocular Lens Insertion "Extraction Cataract with Intraocular Lens Insertion"			Procedure Generic		
31-Oct-2017	LGHOR CAT1		Elective	16:00	LGHOR-1468	Godinho, D	Extraction Cataract with Intraocular Lens Insertion "Extraction Cataract"			Procedure Generic		
31-Oct-2017	LGHOR CAT1		Elective	16:45	LGHOR-1471	Baggio, A	Tonsillectomy and Adenoidectomy "tonsillectomy"			Procedure Generic		
31-Oct-2017	LGHOR KC		Elective	10:00	LGHOR-1465	Plisvcw, T	Repair Hernia Inguinal "Repair Hernia Inguinal"			Surgeon Specific	Pt. Out of Phase II	
31-Oct-2017	LGHOR KC		E2: < 4 hours	11:00	LGHOR-1469	Plisvcw, T	Arthroplasty Cemented Hip "Arthroplasty Cemented Hip"			Procedure Generic	Pt. Out of Phase II	
<b>09-Nov-2017 (1 case)</b>												
09-Nov-2017	LGHOR GRS		Elective	10:27	LGHOR-1450	Jando, V	Arthroplasty Cemented Hip "HIP REPLACEMENT"			Procedure Generic		

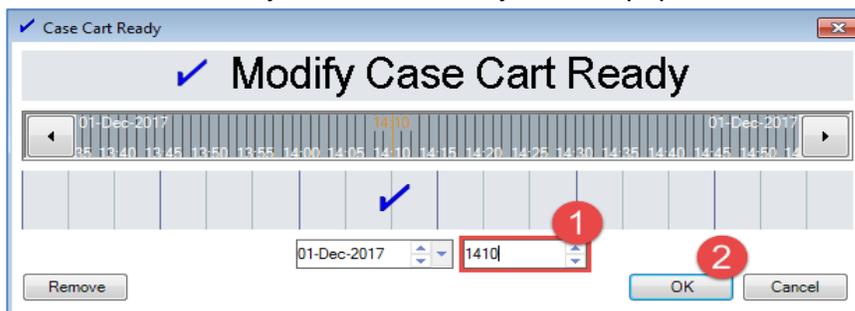
**5 Modify Event**

Modifying an Event allows you to change the date and time for the execution of each event. The default time displayed for an event is based on the time the event was set within the system. There are instances where the time of setting the event may be earlier/later than the actual time.

In this case, the time can be **manually modified** to reflect the actual time of when the event occurred.



1. Right click on the row of Case Cart Ready within the Case Tracking Set Events window. To reopen the Case Tracking Set Events Window, Right click on the Patient's row. Click Set Events. Click the **Case Cart** Tab (If not already displayed)..
2. Click Modify Event.
  - Modify Case Cart Ready window populates



1. Set the time to 5 min from the current time (e.g. If the current time is 1415, set the time for 1410).
2. Click **OK**

**Note:** Be careful when updating the time as it is possible to set a future time.

### Key Learning Points

- Setting an event is real time communication of Case Cart Ready, Case Cart Not Ready, or Case Cart incomplete
- Other events, set by other staff members, will also appear on the tracking board.
- Events can be added, modified or removed.

## PATIENT SCENARIO 2 – Manually Print a Pick List

### Learning Objectives

At the end of this Scenario, you will be able to:

- Print preference cards/pick lists when appropriate

### SCENARIO

The OR called to inform MDRD that an **Emergency Appendectomy** was just booked and this now appears on your view within Perioperative Tracking. Typically, emergency cases booked, will automatically print out the associated Preference Card; however, in this scenario it did not print. As a result, the preference card/picklists needs to be manually printed immediately as the case is slated for 30 min from the current time and will therefore be a priority to be picked.

As a member of the MDRD you will be completing the following activities:

- Manually print a Case Pick List Report

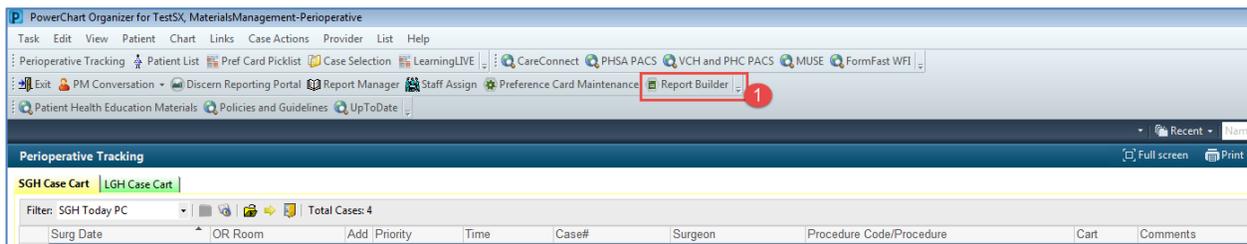
## Activity 2.1 – Manually printing a case picklist report

The **Case Picklist Report** (also known as a Doctor Preference Card or Pick Lists), will automatically print to a designated printer when a case has been scheduled.

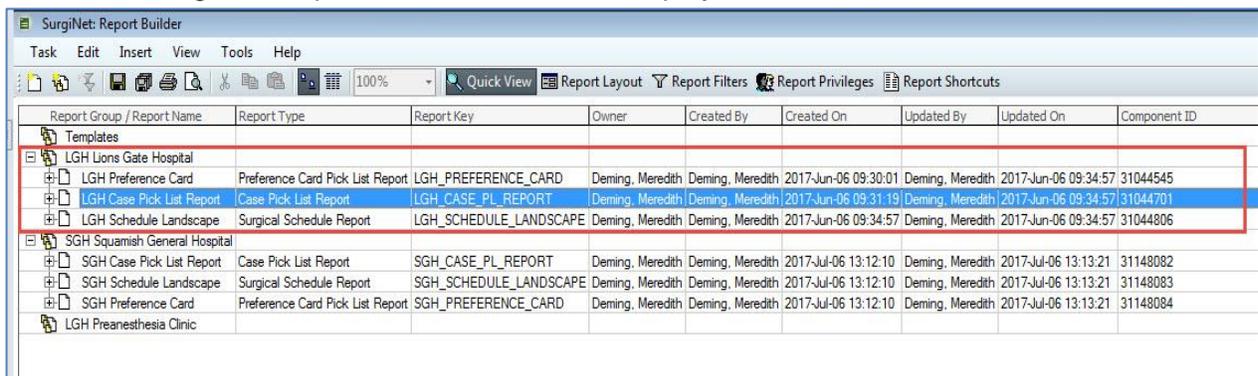
All elective cases will print out at a set time (Ops jobs for the Case Pick List Report are set for 12:30pm for LGH and SGH +1 and +3 days) each day.

Emergency cases will automatically print out as soon as the case is booked. If needed you can manually print the report. These are the steps:

### 1 Manually Print a Case Picklist Report



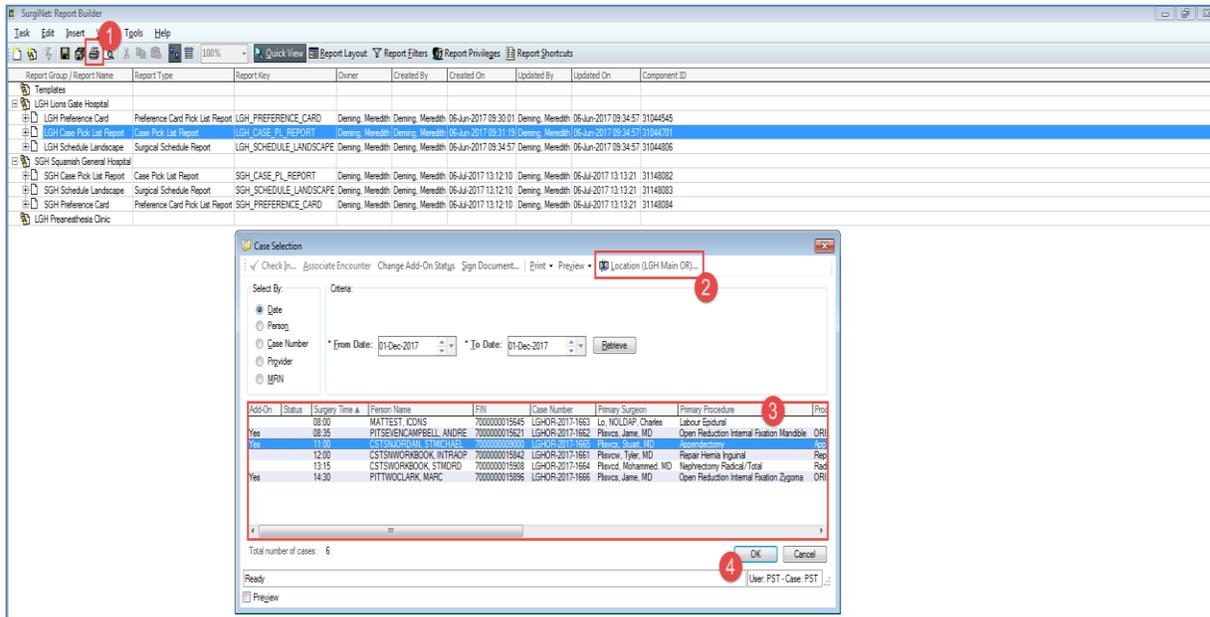
1. Locate the Report Builder within the toolbar
  - SurgiNet: Report Builder window will display.



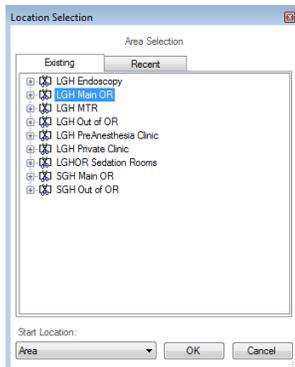
### 2. Select LGH Case Pick List Report

**Note:** All Case Picklist Reports will be listed here Security for reports is set by the position level and each user only has access to the reports they need.

## Activity 2.1 – Manually printing a case picklist report

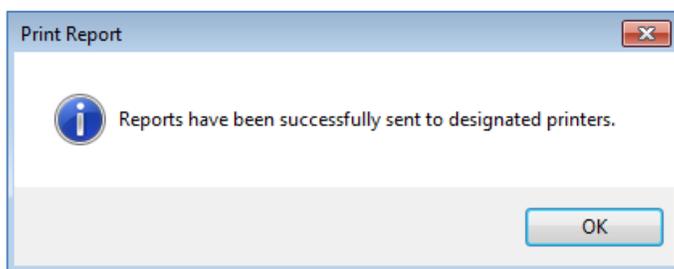


1. Click on the printer icon.



**Note:** If this is first time the user is accessing this, the Location Selection window pops up. Select the LGH Main OR and click OK to close this window. If not, then continue:

- The Case Selection window will open and a list of patients and their respective case information will display.
2. Verify Location is LGH Main OR
  3. Locate your surgical case (Appendectomy)
  4. Highlight the surgical case by clicking on the appropriate row
  5. Click **OK**



6. The Print Report Window will open indicating that the Report has been sent to the associated Printer

The Case Picklist Report contains the following information: patient demographics, OR location, date/time of procedure, procedure type, comments and an itemized pick list.

Case Number:	LGHOR-2017-1665	OR:	LGHOR AddOn 01
Primary Surgeon:	Fliisvck, Stuart, MD	Surg Date:	01/12/17
Patient:	CSTSNJORDAN, STMICHAEL	Surg Time:	00:00
Age:	41 Years		
Allergies:	As of 01/12/17 15:01:46 :No Known Allergies		
Procedure:	Appendectomy		Appendectomy
Scheduling Comments:			

PICKED	OPEN	HOLD	ITEM DESCRIPTION	STOCK LOCATION	ITEM NUMBER	LATEX	UNIT PRICE	MFG ITEM #
_____	2	0	BLADE SCALPEL RIB BACK #15 CARBON STEEL	<Not-Def ined>	00023265	No	0	371115
_____	2	0	BLADE SCALPEL SAFETY CARTRIDGE #10 SS	<Not-Def ined>	00085014	No	0	73-8010
_____	0	1	DRAIN EVAC CLSD WND SUCT FULL PERF FLAT	<Not-Def ined>	00004846	No	0	00-2565-000-10
_____	1	0	DRAPE COVER TABLE 44X90IN	<Not-Def ined>	00022144	No	0	A8377
_____	1	0	DRAPE UTILITY W/ADHE 15X26IN	<Not-Def ined>	00084003	No	0	A7553
_____	1	0	DRSG MEFPORE ISLAND ADHE 9X15CM	<Not-Def ined>	00016955	No	0	671000
_____	1	0	KIT MINI SURG	<Not-Def ined>	00032914	No	0	31141552
_____	1	0	LGH FORCEPS KOCHER SHORT	<Not-Def ined>	LGH403928	No	0	
_____	1	0	LGH FORCEPS LOWER FINE TIP	<Not-Def ined>	LGH403931	No	0	
_____	1	0	LGH HANDLE LIGHT MIS	<Not-Def ined>	LGH403965	No	0	
_____	1	0	LGH JUG SMALL STAINLESS STEEL	<Not-Def ined>	LGH403837	No	0	
_____	1	0	LGH LINEN GOWN (SINGLE)	<Not-Def ined>	LGH403666	No	0	
_____	1	0	LGH POOLE TIP SUCTION	<Not-Def ined>	LGH404512	No	0	
_____	1	0	LGH RETRACTOR RICHARDSON	<Not-Def ined>	LGH404377	No	0	

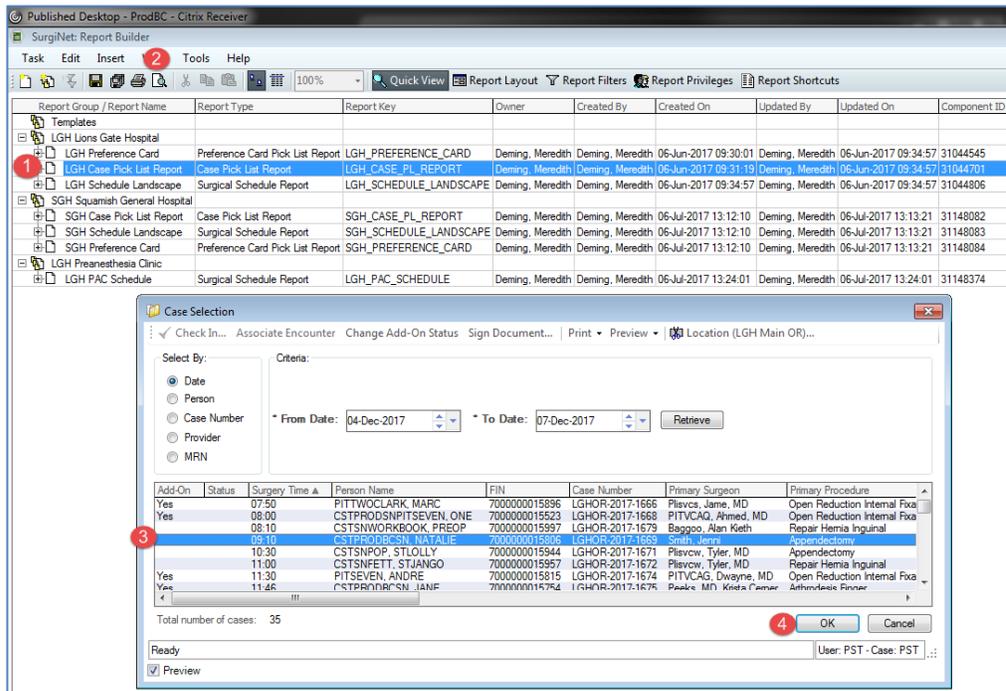
Card Last Updated:	06/11/17 11:47
Card Last Updated By:	TestSX, NurseTeamLead-Perioperative1

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**Note:** Based off your selection: The Cerner system will detect which procedure and surgeon the patient has been scheduled for and determine which Doctor Preference Card (DPC) to pull.

2

Preview a Report Before Printing



1. Click the **LGH Case Pick List Report**
2. Click the **Preview Icon**
  - The Case Selection Window will open
3. Select the patient/procedure you would like to preview
4. Click **OK**
  - The Report Output – preview will open

Published Desktop - ProdBC - Citrix Receiver

Report Output - preview\_12\_07\_2017\_17\_54\_32.tmp

75%

Case Number: LGHOR-2017-1669 OR: LGHOR WC  
 Primary Surgeon: Smith, Jenni Surg Date: 04/12/17  
 Patient: CSTPROBECSN, NATALIE Surg Time: 00:00  
 Age: 28 Years  
 Allergies: As of 07/12/17 09:54:32 :penicillin, Pollen  
 Procedure: Appendectomy Appendectomy  
 Scheduling Comments:

PICKED	OPEN	HOLD	ITEM DESCRIPTION	STOCK LOCATION	ITEM NUMBER	LATEX	UNIT PRICE	MFG ITEM #
_____	2	0	BLADE SCALPEL RIB BACK #15 CARBON STEEL	<Not-Def ined>	00023265	No	0	371115
_____	2	0	BLADE SCALPEL SAFETY CARTRIDGE #10 SS	<Not-Def ined>	00085014	No	0	73-8010
_____	0	1	DRAIN EVAC CLSD WND SUCT FULL PERF FLAT	<Not-Def ined>	00004846	No	0	00-2565-000 -10
_____	1	0	DRAPE COVER TABLE 44X90IN	<Not-Def ined>	00022144	No	0	A8377
_____	1	0	DRAPE UTILITY W/ADHE 15X26IN	<Not-Def ined>	00084003	No	0	A7553
_____	1	0	DRSG MEPORE ISLAND ADHE 5X19CM	<Not-Def ined>	00016955	No	0	671000
_____	1	0	KIT MINI SURG	<Not-Def ined>	00032914	No	0	31141552
_____	1	0	LGH FORCEPS KOCHER SHORT	<Not-Def ined>	LGH403928	No	0	
_____	1	0	LGH FORCEPS LOWER FINE TIP	<Not-Def ined>	LGH403931	No	0	
_____	1	0	LGH HANDLE LIGHT MIS	<Not-Def ined>	LGH403965	No	0	
_____	1	0	LGH JUG SMALL STAINLESS STEEL	<Not-Def ined>	LGH403837	No	0	
_____	1	0	LGH LINEN GOWN (SINGLE)	<Not-Def ined>	LGH403666	No	0	
_____	1	0	LGH POOLE TIP SUCTION	<Not-Def ined>	LGH404512	No	0	
_____	1	0	LGH RETRACTOR RICHARDSON	<Not-Def ined>	LGH404377	No	0	

Card Last Updated: 06/11/17 11:47  
 Card Last Updated By: TestSK,  
 NurseTeamLead-Perioperative1

Printed: 07/12/17 Page 3

### Key Learning Points

- Case Picklist Reports will automatically print out.
- Elective cases will print out at a set time each day.
- Emergency cases will print out when booked (must be booked as an “Add on”)
- Case Picklist Reports can be manually printed when required through the SurgiNet Report Builder application (snreportbuilder)

## End of Workbook

You are ready for your Key Learning Review. Please contact your instructor for your Key Learning Review.