

**SELF- GUIDED PRACTICE WORKBOOK [N44]**  
CST Transformational Learning

WORKBOOK TITLE:

**Nursing: OR Manager/Team Lead  
(Preference Card Management)**

 **TABLE OF CONTENTS**

- SELF-GUIDED PRACTICE WORKBOOK .....3
- Using Train Domain .....4
- PATIENT SCENARIO.....5
  - Activity 1.1 – Preference Card Maintenance .....6
  - Activity 1.2 – Global Pick List Update .....21
  - Activity 1.3 – Copy Wizard .....29
  - End of Workbook .....43

## # SELF-GUIDED PRACTICE WORKBOOK

<b>Duration</b>	<b>1 hour 30 min</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

### Learning Objectives

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

-  Search for a Preference Card
-  Create a Preference Card
-  Add Preference Card Comments
-  Add Pick List Items to a preference Card
-  Removing an Item from the Pick List
-  Documentation Segment Association
-  Documentation Defaults
-  Modify Existing Documentation Defaults
-  Global Pick List Updates
-  Copy Wizard for Preference Cards
-  Advanced Copy Tool for Preference Cards

### SCENARIO

In this scenario, you will complete the following steps to configure preference cards:

-  Access Preference Card Maintenance
-  Configure a preference card
-  Navigate through the preference card information
-  Use Global Pick List to update cards
-  Use Copy Wizard to copy cards
-  Use the Advanced Copy Tool to copy cards across multiple criteria

## Activity 1.1 – Preference Card Maintenance

### 1 Searching Preference Cards Overview

A Preference Card contains information for a procedure.

Information includes, but is not limited to:

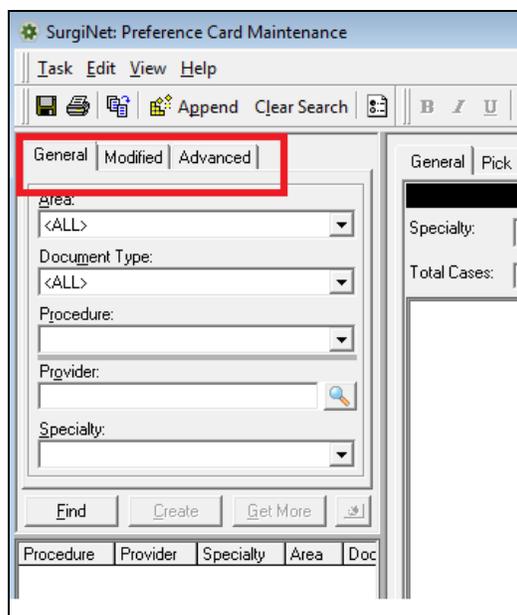
- **Pick Lists** - the list of all inventory items required for the specific case. It can be used for inventory tracking and billing purposes. The Pick List component consists of the items, equipment, and medications for the preference card.
- **Segments** - equivalent to a form that the nurse uses to document a case in the Operating Room (OR)/ Procedure Room. Not all segments are relevant to all cases, and so you can pick and choose the segments that should be associated to each procedure and surgeon and configure them on the preference card.
- **Comments** - General Comments

Information entered in these tabs is used to search for preference cards by:

1. Login into PowerChart

2. Select  Preference Card Maintenance from the Toolbar

The components that make up the search criteria box are:



1. **Tabs**

- **General**

This tab allows you to search for preference cards based on their core characteristics.

- **Modified**

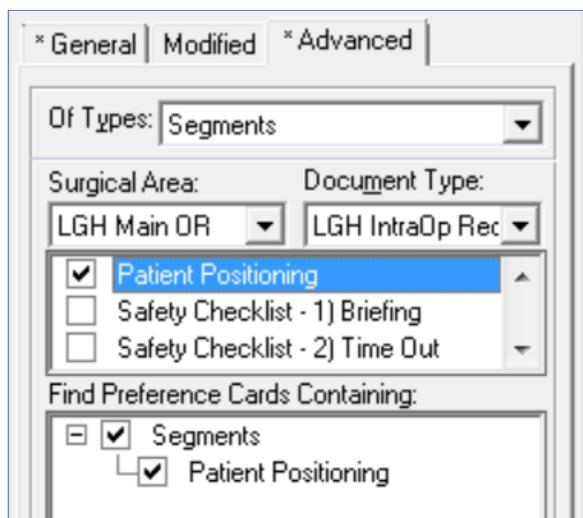
This tab allows you to search for preference cards that have been created, updated, or were last used in a case within a certain date range or by a particular user.

- **Advanced**

The Advanced tab is used when you want to search all preference cards that have a certain item, comment type, or segment. You can choose only one option per search.

## 2. Filters

- Can be applied on each tab to allow for specific searching.
- Filters applied on the three tabs are additive; in other words, if there is filter information on two tabs, then the system can only find cards that match all the criteria.



- When a filter(s) are applied on a tab, an asterisk is displayed in front of the filter name. For example: *\*Advanced* .

## 2 Search Preference Cards

Search for Preference Cards in order to configure or create cards.

Complete the following steps, by searching for a default (or generic) Preference Card by specialty:

\* General | Modified | Advanced |

Area:

Document Type:

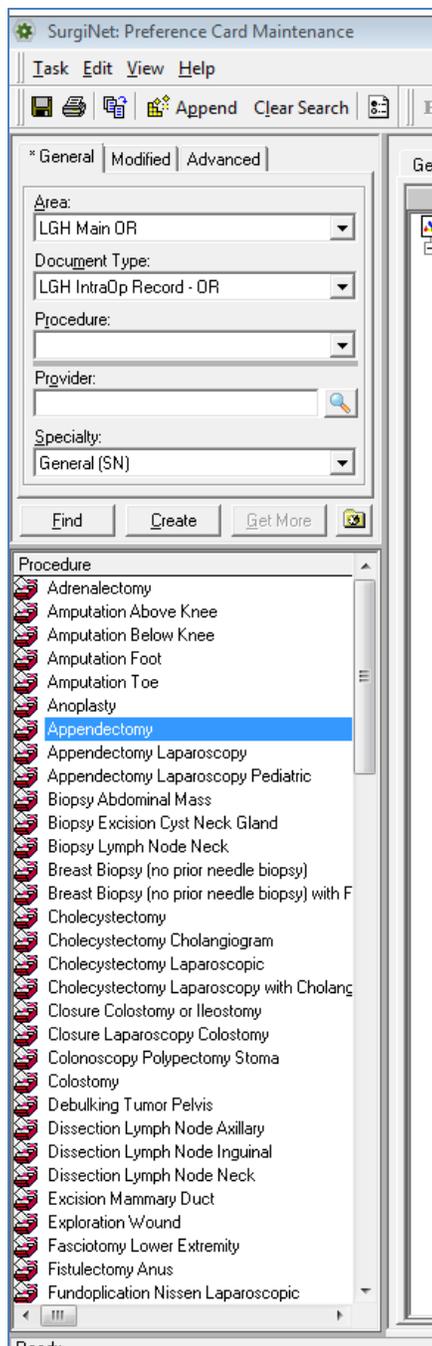
Procedure:

Provider:

Specialty:

Procedure

1. From the General tab, select **LGH Main OR** from the Area dropdown list
2. Select **LGH IntraOp Record- OR** from the Document Type dropdown list
3. Leave the Procedure box blank (you are searching for cards by specialty, not procedure)
4. Leave the Provider box blank (you are searching for a default card, not a provider card)
5. For this scenario, select **General(SN)** as the specialty
6. Select **Find**



7. All General Specialty Preference Cards populate in the Procedure box below the search criteria fields.

3

### Create a Preference Card

To create a Preference Card for an existing or new Surgeon, the Copy Wizard or Advanced Copy Tool would be used to recreate an existing Surgeon's Preference Card for another Surgeon or a new Surgeon (see Activity 1.3). However, if a Preference Card did not exist to

copy from, then it will have to be created.

To create a nonexistent Preference Card:

The screenshot shows the SurgiNet Preference Card Maintenance window. The 'General' tab is selected, and the following fields are visible:

- Area: LGH Main OR
- Document Type: LGH IntraOp Record - OR
- Procedure: Incision and Drainage Auricular
- Provider: Plisvcw, Tyler, MD
- Specialty: General (SN)

The 'Create' button is highlighted with a red box. Below the form, a table displays the procedure and provider information:

Procedure	Provider
Incision and Drainage Auricular	Plisvcw, Tyler

From the General tab:

1. Select **LGH Main OR** from the Area drop-down list.
2. Select **LGH IntraOp Record - OR** from the Document Type drop-down list.
3. Enter the first few letters in the Procedure box of your assigned Procedure.
4. Enter **Plisvcw, Tyler** in the Provider box
5. Select **General (SN)** as the specialty.
6. Click **Create**
7. The card name populates in the box below.

### Incision and Drainage Auricular Example:

Created Date/Time:	12-Dec-2017 15:33
Created By:	TestUser, ORManagement-Perioperative
Last Used In Case:	
Last Updated Date/Time:	12-Dec-2017 15:33
Last Updated By:	TestUser, ORManagement-Perioperative
Default Procedure Specialty:	Plastics (SN)
Specimen Required:	No
Frozen Section Required:	No
Default Case Level:	None
Default Wound Class:	1-Clean
Default Anesthesia Type:	Defer to Anesthesia
Blood Product Required:	No
Implant:	No
X Rays Needed:	No
X Ray Technician Needed:	No
Procedure Count:	1
Default Setup Duration:	0
Default Pre-Incision Duration:	0
Default Procedure Duration:	0
Default Post-Closure Duration:	0
Default Cleanup Duration:	0
Historical Setup Duration:	0
Historical Pre-Incision Duration:	0
Historical Procedure Duration:	0
Historical Post-Closure Duration:	0
Historical Cleanup Duration:	0
Recent Pre-Incision Duration:	0
Recent Procedure Duration:	0
Recent Post-Closure Duration:	0

8. Highlight the name of your surgery. Card details to be completed appear to the right - the details include General, Pick list, Segments, and Comments.

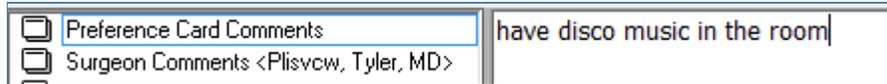
## 4 Adding Preference Card Comments

There are two primary types of preference card comments:

- **Preference Card comments:** only display on the particular preference card a comment is entered on
- **Surgeon comments:** will display on every preference card for that particular surgeon regardless of procedure

Complete the following steps to add Preference Card comments to our newly created (or an existing) Preference Card:

1. Click the **Comments** tab of your preference card.



Preference Card Comments | have disco music in the room |  
Surgeon Comments <Plisvcw, Tyler, MD>

2. Click **Preference Card Comments**.
3. Type “*Have disco music in the room*” in the box to the right
4. Click **Surgeon Comments**
5. Enter comment of your choice. Remember surgeon comments go across all of their existing cards
6. Click  icon to save when finished

## 5 Adding Pick List Items

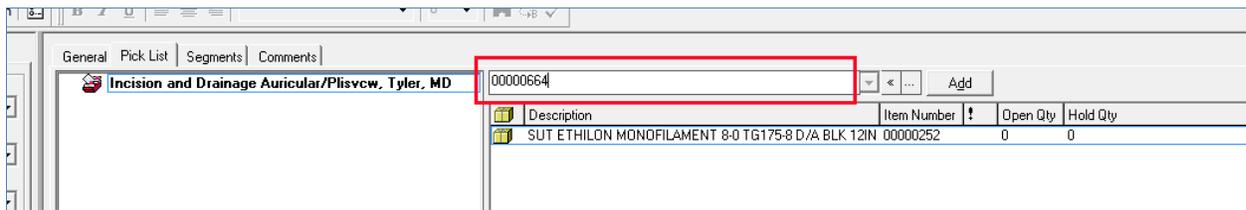
The **Pick List** is the list of all inventory items required for the specific case. It can be used for inventory tracking and billing purposes. The Pick List component consists of items, equipment, and medications for the preference card.

Complete the following steps to add items to the Pick List of our newly created Preference card (or to an existing card):



General **Pick List** Segments Comments  
Incision and Drainage Auricular/Plisvcw, Tyler, MD

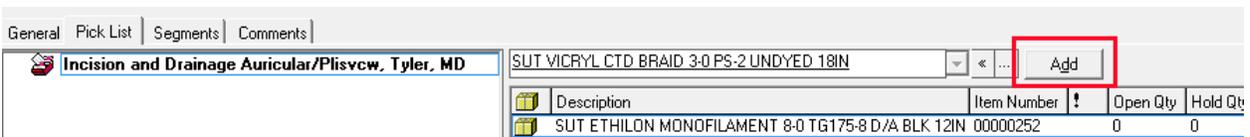
1. Click the **Pick List** tab



General Pick List Segments Comments  
Incision and Drainage Auricular/Plisvcw, Tyler, MD | 00000664 | < ... Add

Description	Item Number	Open Qty	Hold Qty
SUT ETHILON MONOFILAMENT 8-0 TG175-8 D/A BLK 12IN	00000252	0	0

2. Type item number = 00000664 in the search box.



General Pick List Segments Comments  
Incision and Drainage Auricular/Plisvcw, Tyler, MD | SUT VICRYL CTD BRAID 3-0 PS-2 UNDYED 18IN | < ... **Add**

Description	Item Number	Open Qty	Hold Qty
SUT ETHILON MONOFILAMENT 8-0 TG175-8 D/A BLK 12IN	00000252	0	0

3. Click **Enter** on the keyboard. The Search field will populate with a description of the item number. Verify the information.
4. Click **Add**

Alternatively, if the item number is not known:

The screenshot shows a software interface with a search bar containing the text 'sut v'. To the right of the search bar is an ellipsis button (...). Below the search bar is a table with the following data:

Description	Item Number	Open Qty	Hold Qty
SUT ETHILON MONOFILAMENT 8-0 TG175-8 D/A BLK 12IN	00000252	0	0

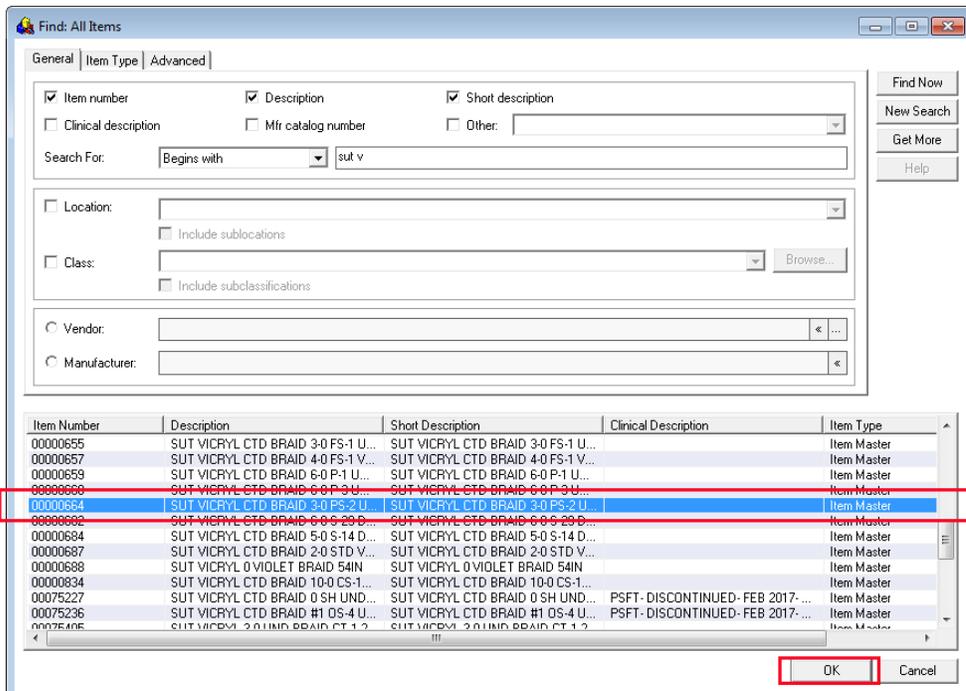
1. Type in a short version of the item: *sut v*
2. Click the **Ellipsis button (...)**
3. The **Find: All Items** box populates.

The screenshot shows the 'Find: All Items' dialog box. The 'General' tab is selected. The search criteria are as follows:

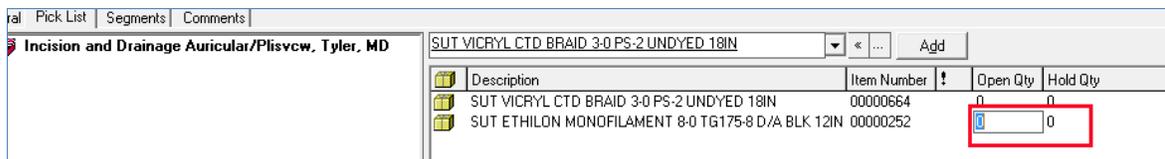
- Item number
- Description
- Short description
- Clinical description
- Mfr catalog number
- Other: [dropdown]
- Search For: Begins with [dropdown] sut v
- Location: [dropdown]
- Include sublocations
- Class: [dropdown] Browse...
- Include subclassifications
- Vendor: [dropdown]
- Manufacturer: [dropdown]

The 'Find Now' button is highlighted in the top right corner of the dialog box.

4. Click the **Description** box
5. Select **Begins with** in the Search For Field
6. Click **Find Now**

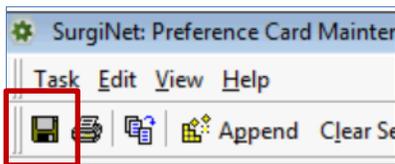


7. Select the suture item from the lower grid and select **OK**. (Note: if the correct item does not display, enter further search criteria)



8. Update the Open and Hold Quantities. Click the **Open Qty** column for the item and enter: the numeric value 10.

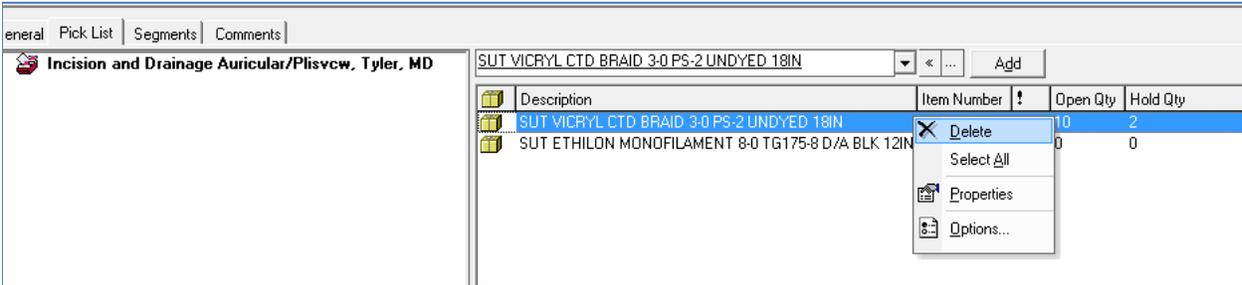
9. Click the **Hold Qty** column for the item and enter: 2.



10. Click **Save** in the upper left corner when finished.

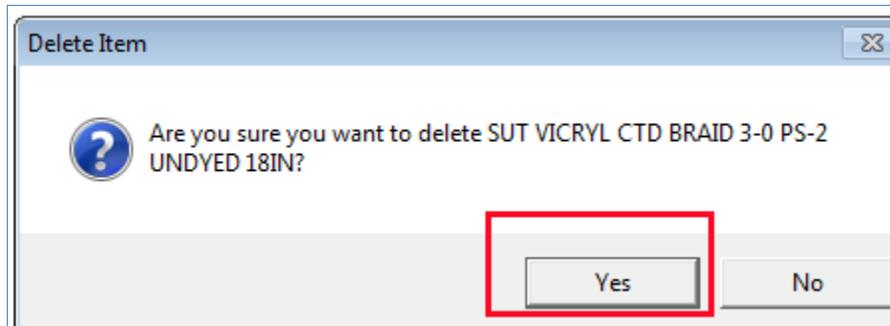
## 6 Removing an Item from the Pick List

Complete the following steps to remove an item from the pick list:



1. Select the suture you just added
2. Right-click and select **Delete**

**Note:** Warning is displayed and asks for confirmation

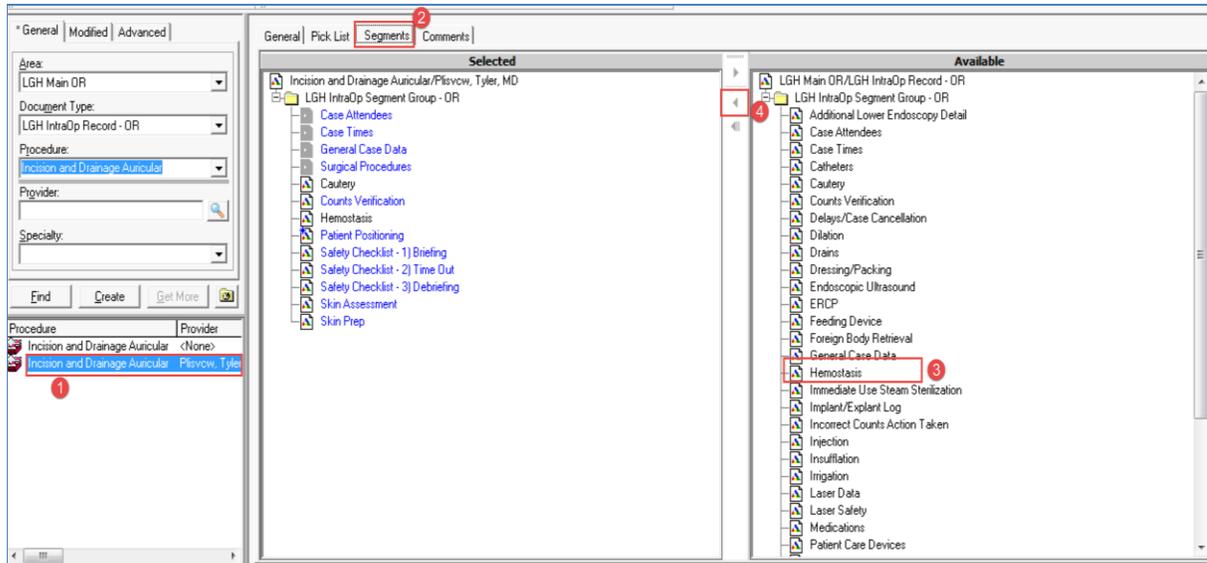


3. Click **Yes**

## 7 Documentation Segments Association

A **segment** is equivalent to a section of a form that the nurse uses to document a case in the Operating Room (OR) i.e. Perioperative Doc. Not all segments are relevant to all cases. You can pick and choose the segments that should be associated to each procedure and/or surgeon and configure (add or remove) them on the preference card.

Complete the following steps to associate segments to our newly created (or an existing) preference cards:



**Note:** Screenshot is a sample for demonstration purposes.

1. Highlight the card you created
2. Click the **Segments** tab.

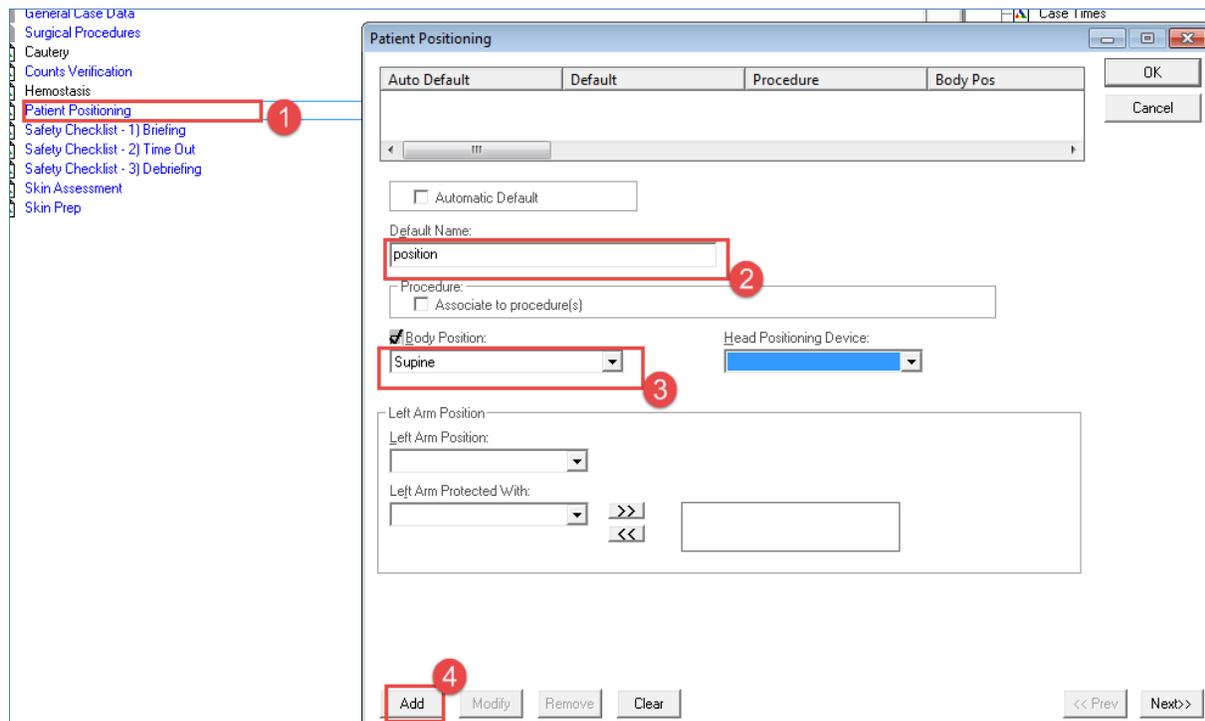
**Note:** Segments already associated with the procedure preference cards show on the left pane under **Selected**. Notice that segments that are required for the document type are already displayed in the selected section in blue text. These segments cannot be removed from the preference card.

3. In the **Available** section, click the **Hemostasis** segment you would like to configure on the preference card.
4. Click the **left arrow** (<) to move the segment to the selected section.
5. Hemostasis segment now appears on the left in the selected section

## 8 Documentation Defaults

In addition to associating segments for every preference card, you can also configure documentation defaults for the documentation values that remain consistent from case to case. For example, the patient positioning for an appendectomy is usually supine; a documentation default can be set so the value of supine automatically populates the patient positioning box and the nurse only needs to verify that the value is correct.

Complete the following steps to add **documentation defaults**:



1. In the selected section, double-click the segment **Patient Positioning**
  - The Patient Positioning window opens.
2. Enter **Position** for the default name.
 

**Note:** Do not click the Automatic Default box. If it is selected; when Perioperative Doc is opened it will automatically populate the segment and bypass the segment in the order sequence of documentation and will not prompt to review and modify the information.
3. Select **Supine** for Body Position
4. Click **Add**
  - The entry populates to the Multi-Entry box at the top

5. Click **OK** when you are finished.

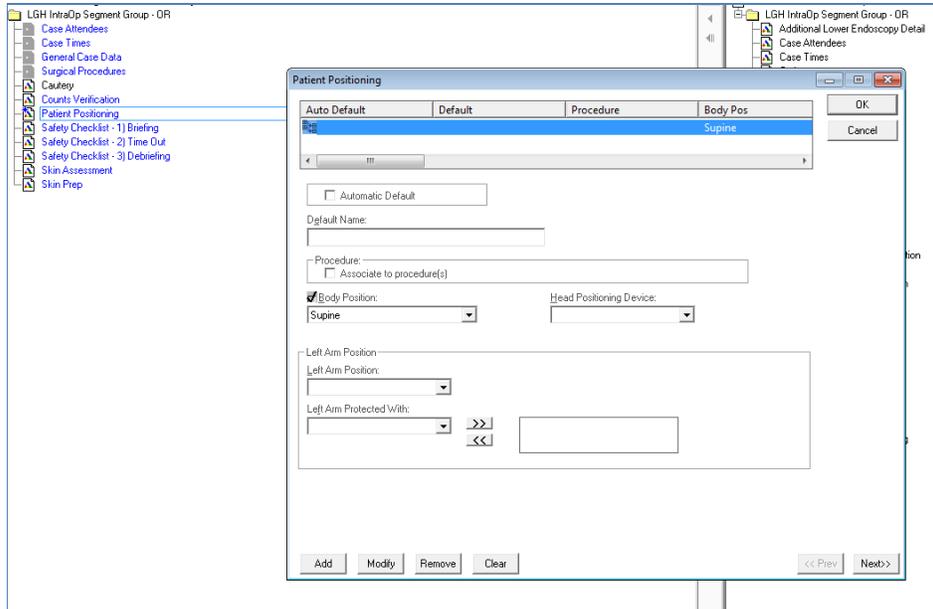
This brings you back to the Preference Card Maintenance main screen. Note the blue asterisk above the segment name denoting the default.

6. Click **Save**.

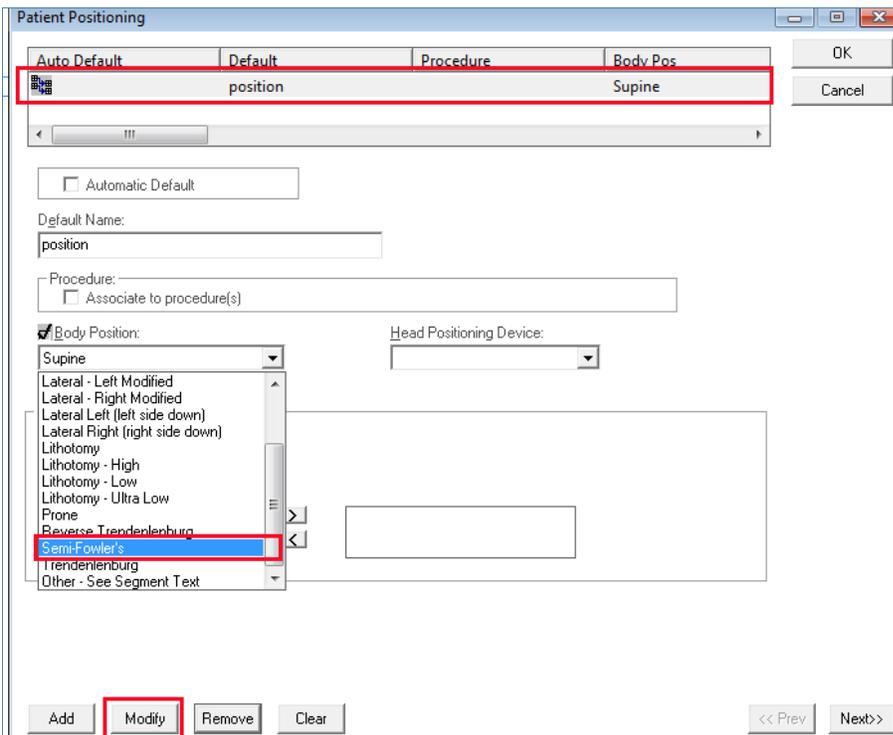
**Note:** If the segment includes an inventory control, the drop-down list for that control is disabled. To select an inventory item to add to the default, click **Search** (...) to open the Find: All Items dialog box.

**9 Modifying Existing Documentation Defaults**

Complete the following steps to modify the existing default on patient positioning:



1. Double-click the segment Patient Positioning
  - The Patient Positioning window opens
2. Select the default **position** in the Multi-Entry box



3. Select **Semi-Fowler's** from the Body Position drop down to change the body position from Supine to Semi-Fowler
4. Click **Modify**

The screenshot shows the 'Patient Positioning' dialog box. At the top, there are tabs for 'Auto Default', 'Default', 'Procedure', and 'Body Pos'. The 'Body Pos' dropdown menu is open, showing 'Semi-Fowler's' selected. The 'OK' button is highlighted with a red box. Below the tabs, there is a table with columns for 'position' and 'Body Pos'. The 'position' column contains 'position' and the 'Body Pos' column contains 'Semi-Fowler's'. Below the table, there is a checkbox for 'Automatic Default'. The 'Default Name' field contains 'position'. The 'Procedure' field has a checkbox for 'Associate to procedure(s)'. The 'Body Position' dropdown is set to 'Semi-Fowler's' and the 'Head Positioning Device' dropdown is empty. The 'Left Arm Position' section has a dropdown for 'Left Arm Position' and a dropdown for 'Left Arm Protected With' with '>>' and '<<' buttons. At the bottom, there are buttons for 'Add', 'Modify', 'Remove', 'Clear', '<< Prev', and 'Next >>'. The 'Modify' button is highlighted with a red box.

5. Verify the Multi- Entry box field is updated
6. Click **OK**

**Note:** The same steps are followed to Remove a default i.e. click Remove in Step 4.

### Key Learning Points

- You can search for a Preference Card utilizing the General, Advanced, or Modify tabs.
- You can apply filters to narrow your search of preference cards.
- You can create a surgeon specific preference card.
- You can add comments, add picklist items, set defaults, and add segments into newly created or existing Preference Cards.
- You can modify or remove defaults.

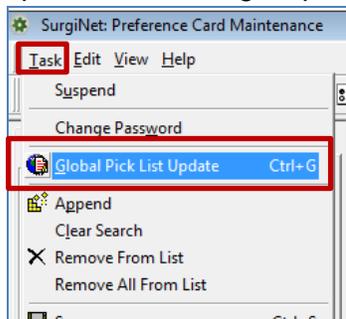
## Activity 1.2 – Global Pick List Update

### 1 Update a group of Preference Cards

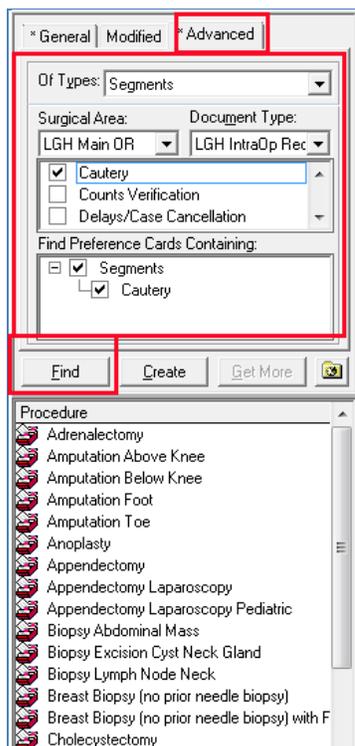
The Global Pick List Update allows you to update a group of preference cards at one time. This is very helpful in cases when you need to add, delete, or replace an item for a group or selection of cards. Instead of going into every preference card to find that item, you can search for all cards containing that particular item and update all or part of the group.

**Note:** Global Pick List Update is for Pick List items only, not for Preference Card comments (the Advanced Copy Tool would be utilized for this)

Complete the following steps to update a group of preference cards:



1. From the Preference Card Maintenance Task menu, select **Global Pick List Update**.



2. Click the **Advanced** tab

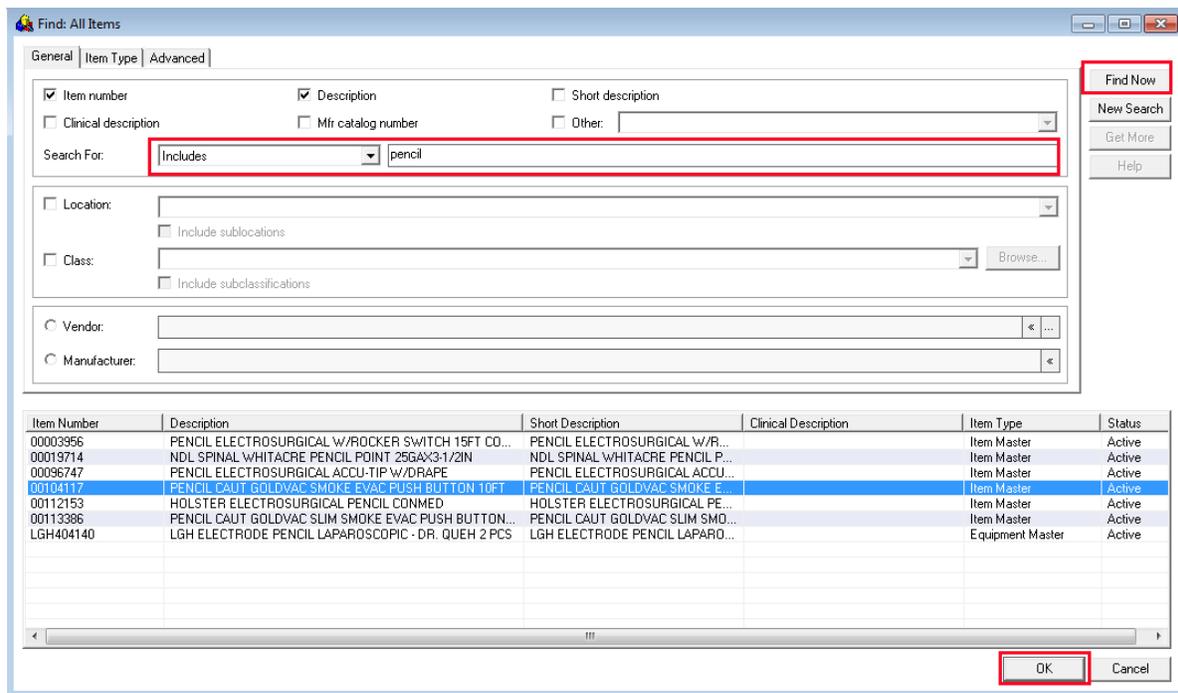
3. Select Surgical Area = *LGH Main OR*
4. Select Document Type = *LGH Intraop Record - OR*
5. Select *Cautery*
6. Click **Find**
7. Preference Cards populate



8. Click **Add Items**.

**Note:** **Delete Items**, or **Replace Items** following the same steps. For example, if you want to globally delete items from a group of preference cards, click **Delete Items**.

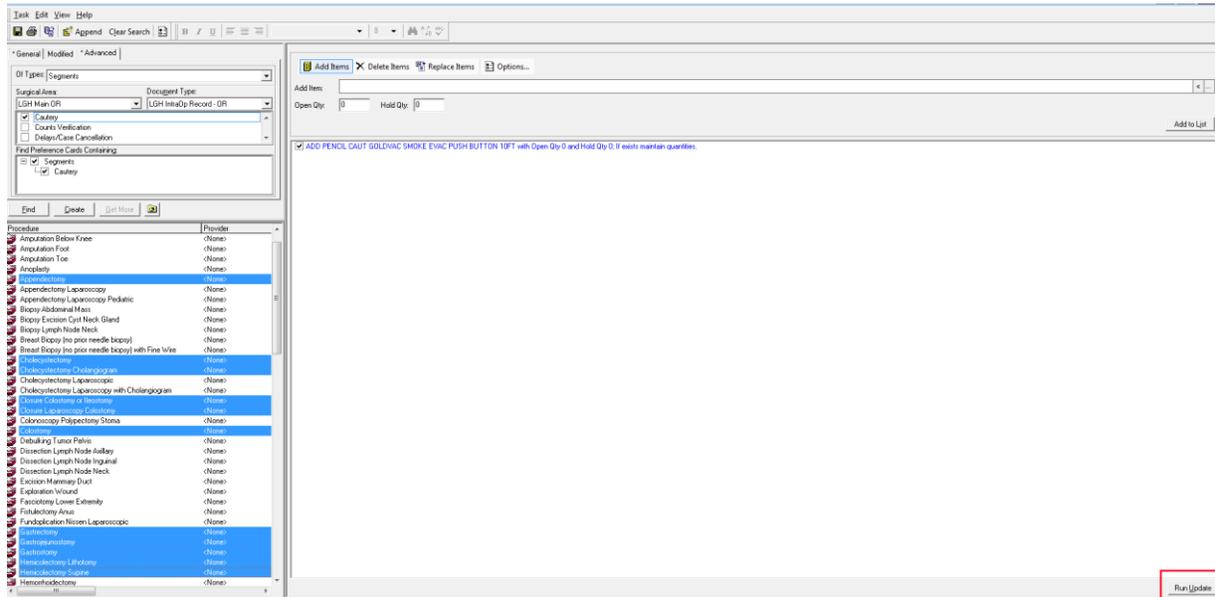
9. Click the **Find: All Items** icon.
  - The Find: All Items box populates



10. Select *Includes* from the drop down menu, next to the **Search For:** box
11. Enter: *Pencil*
12. Click **Find Now**
13. Click to highlight: *PENCIL CAUT GOLDVAC SMOKE EVAC PUSH BUTTON 10FT*
14. Click **OK**. The Add Item field populates.

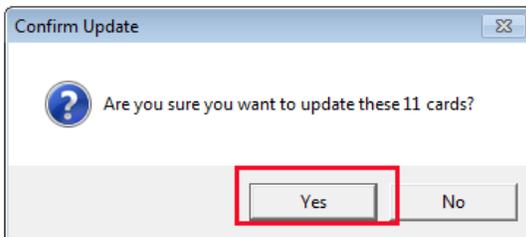


15. Click **Add to List**.

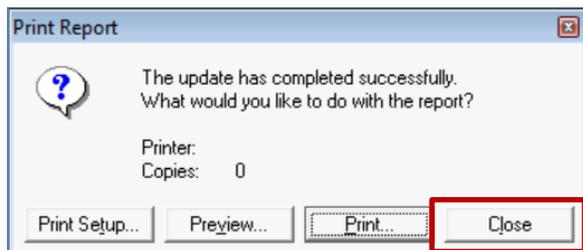


16. Select the preference cards you want to update from the list on the left, by holding down the **CTRL** button on the keyboard to select more than one.

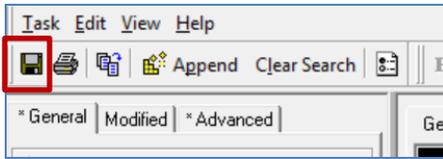
17. Click **Run Update**



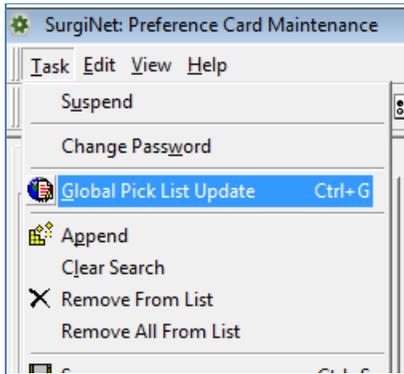
18. Click **YES** from the Confirm Update message if you are ready to update the chosen cards.



19. You can choose to print or preview a report that details the changes you made to the preference cards. Click **Close** when finished.



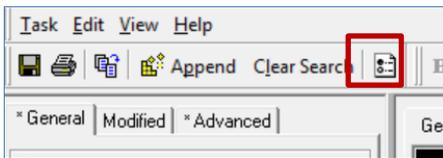
20. Click **Save**



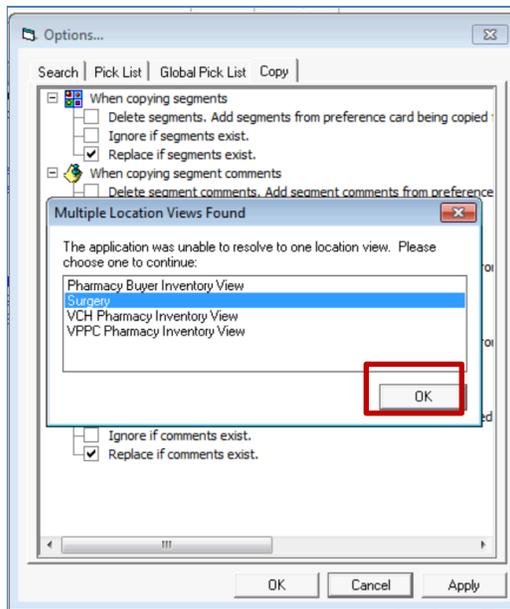
21. To turn off Global Pick List Update, from the Task menu deselect **Global Pick List Update**.

## 2 Global Pick List Settings

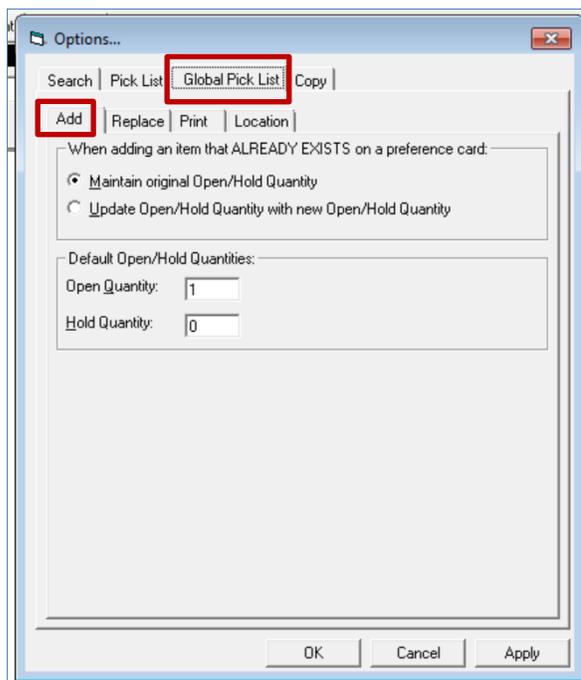
There are several default settings that affect the way global pick list changes occur.



These settings can be accessed by clicking the Options  button on the Toolbar



1. Select *Surgery* as the location.
2. Click **OK**. The Options... screen will open to the Copy tab



3. Select the Global Pick List tab
  - Notice the tabs within Global Pick List options.
5. Click on the **Add** tab

The following settings are available when adding an item that already exists on a Preference Card:

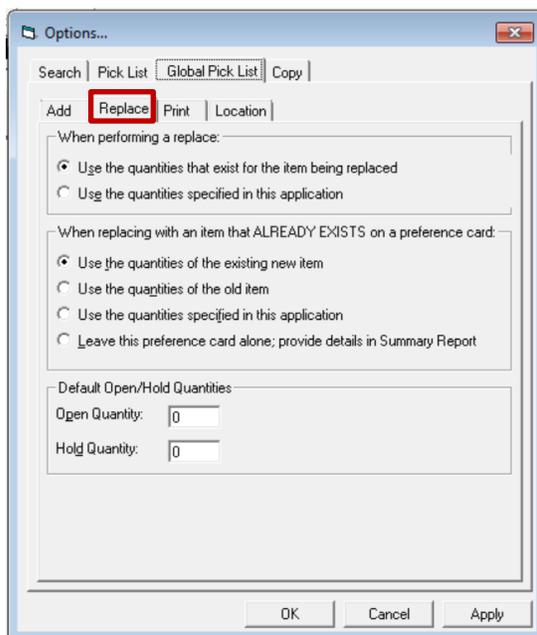
- **Maintain Original Open/Hold Quantity:** If the item to add already exists on that

preference card, then it remains on the pick list with its original quantities.

- **Update Open/Hold Quantity with new Open/Hold Quantity:** If the Item to add already exists on that preference card, then it remains on the pick list, and the quantities change to what is designated in the Default Open/Hold Quantities setting.

The following settings are available for defaulting Open/Hold Quantities:

- **Open Quantity:** If a new item is being added, the system defaults to open quantity. The open quantity can be changed manually during or after the global update is complete.
- **Hold Quantity:** If a new item is being added, the system defaults to hold quantity. The hold quantity can be changed manually during or after the global update is complete.



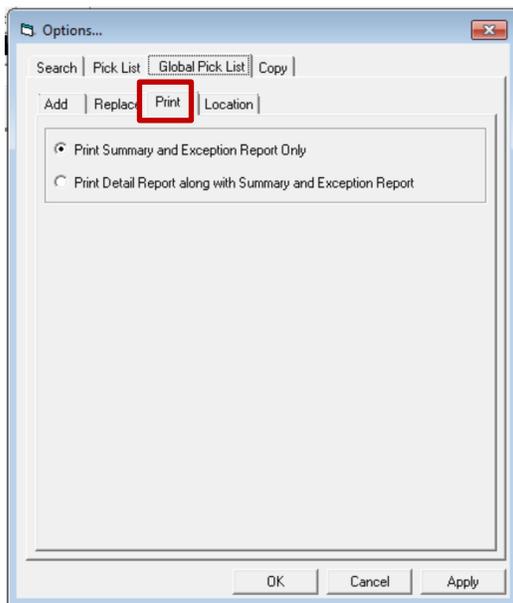
#### 6. Click the **Replace** Tab

The following settings are available when performing a replace:

- **Use the Quantities that Exist for the Item Being Replaced:** If the Item to replace exists on that preference card, then the new item replaces it. The open and hold quantities for the new item are the same as they were for the old item.
- **Use the Quantities Specified in this Application:** If the item to replace exists on that preference card, then the new item replaces it, and the quantities change to what is designated in the Default Open/Hold Quantities setting.

The following settings are available when Replacing with an item that **ALREADY EXISTS** on a preference card:

- **Use the Quantities of the Existing New Item:** If the item to replace exists on the preference card, but the new item also exists on the preference card, then the old item is replaced, and the new item will use the same open and hold quantities that the first instance has. The result is two rows on the pick list that are the same item with exactly the same quantities.
- **Use the Quantities of the Old Item:** If the item to replace exists on the preference card, but the new item also exists on the preference card, then the old item is replaced, and the open and hold quantities are the same as they were for the old item.
- **Use the Quantities Specified in this Application:** If the item to replace exists on the preference card, but the new item also exists on the preference card, then the old item is replaced, and the quantities for the new item change to what is designated in the Default Open/Hold Quantities setting.
- **Leave the Preference Card Alone: Provide Details in Summary Report:** If the item to replace exists on the preference card, but the new item also exists on the preference card, then the old item is not replaced. Additional details are available on the Summary Report.



7. Click the **Print** tab

The following settings are available for printing:

- **Print Summary and Exception Report Only:** Once the global update is complete, a summary report of what was updated is available for viewing on-screen, or printing.
- **Print Detail Report along with Summary and Exception Report:** Once the global update is complete, a detailed report of what was updated is available for viewing on-

screen, or printing.

8. Click **Cancel** to exit the Options window

### **Key Learning Points**

-  You can use Global Pick List to update cards
-  You can change the settings of the Global Pick List

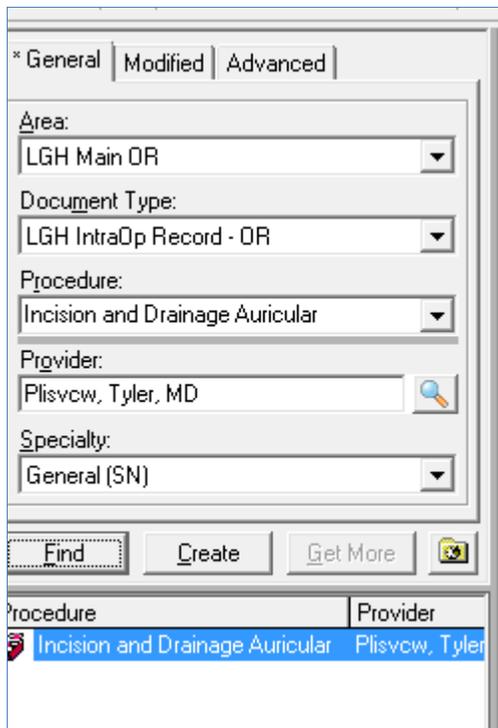
## Activity 1.3 – Copy Wizard

### 1 Copy One Preference Card to a Newly Created Surgeon's Card

The Copy Wizard allows you to copy from one preference card to another. For example, if a new surgeon comes to the hospital, you can copy from an existing surgeon's preference card instead of creating one from scratch.

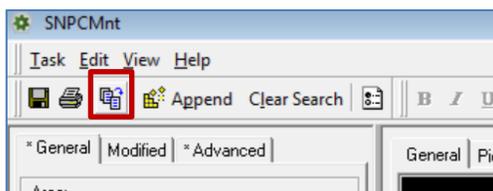
**Note:** To copy from multiple cards or to copy information from one surgical area to another, use the Preference Card Advanced Copy Tool.

Complete the following steps to copy from one preference card to another – copy Dr. Tyler Plisvcw's card to a newly created card for Dr. Stuart Plisvcx for the same procedure:



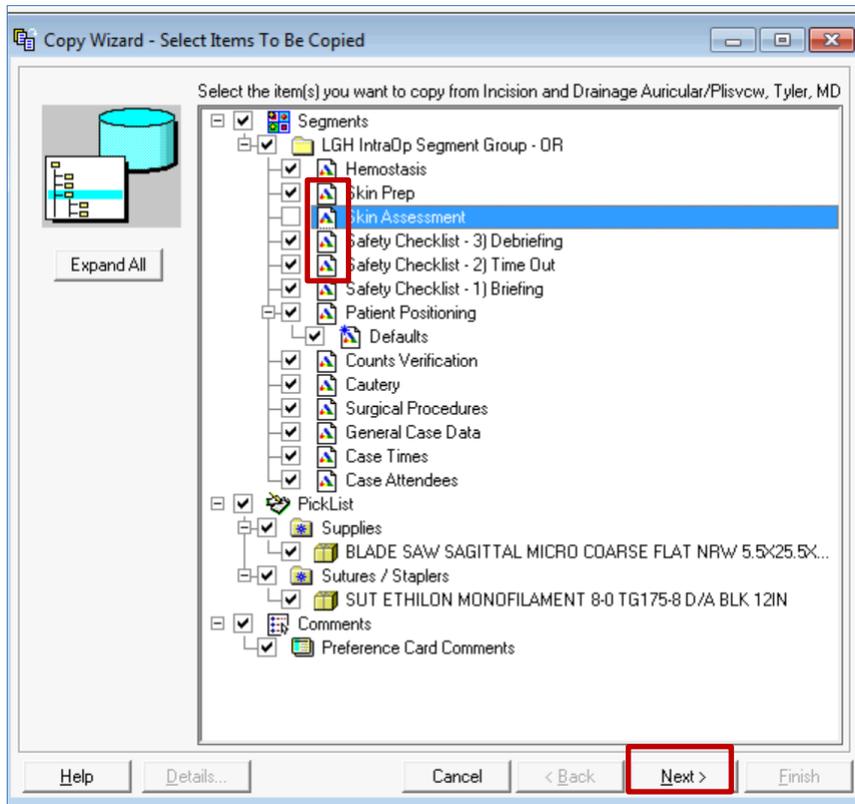
Procedure	Provider
Incision and Drainage Auricular	Plisvcw, Tyler

1. Unselect the search criteria from the **Advanced** tab.
2. Return to the **General** tab.
3. Fill in the search criteria above, and search to find the Incision and Drainage Auricular preference card for Dr. Plisvcw, Tyler to copy. Highlight the card.

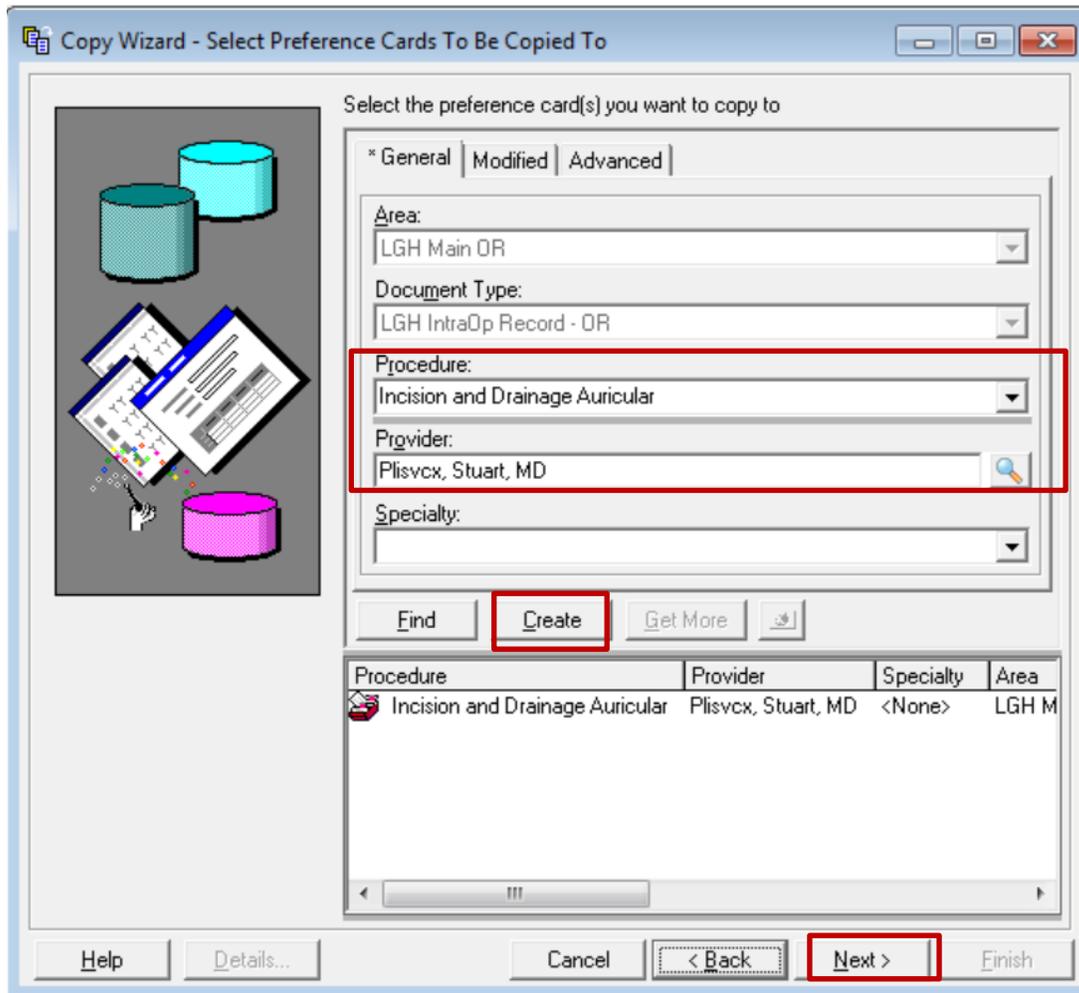


4. Click the **Copy To** button

- This opens the Copy Wizard. The Copy Wizard – Select Items To Be Copied window displays.

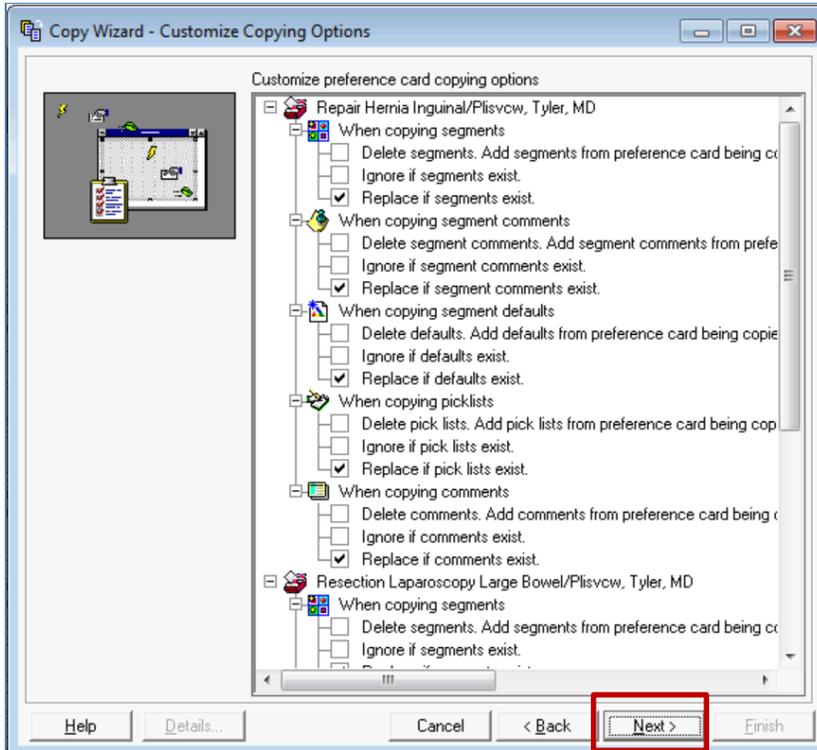


- Select or deselect the segments, items, and comments that you want to copy by unchecking or leaving the boxes checked.
- Click **Next**. The Copy Wizard – Select Preference Cards To Be Copied To window displays.



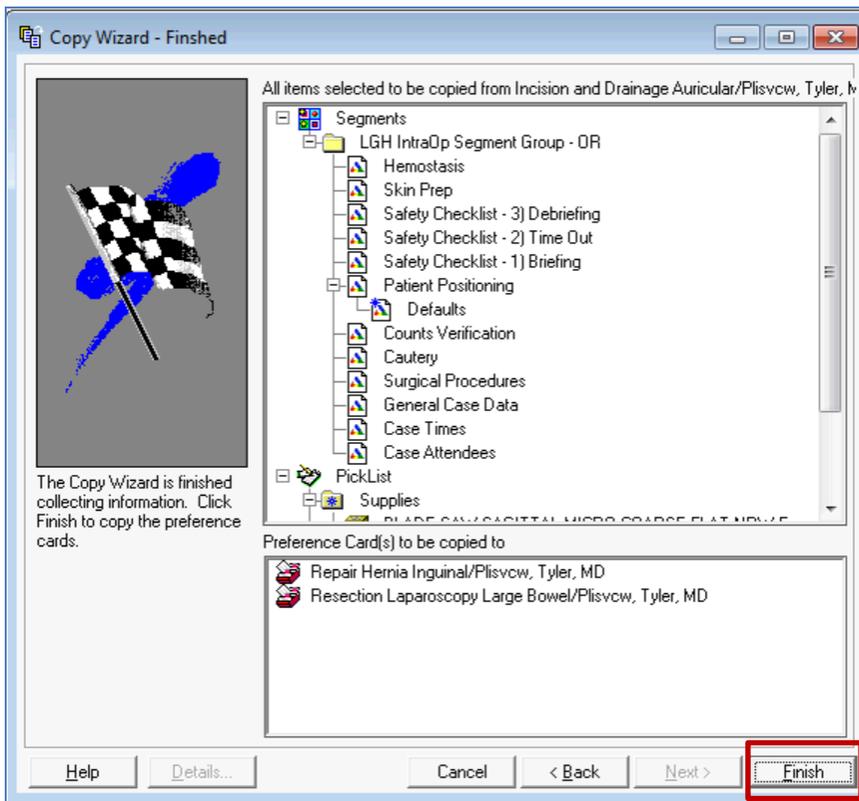
Enter the search criteria:

8. Procedure: Incision and Drainage Auricular
9. Provider: Plisvcx, Stuart
10. Click Create. Your newly created card populates to the list box below.
11. Highlight the card Incision and Drainage Auricular
12. Click **Next**. The Copy Wizard – Customize Copying Options window displays.



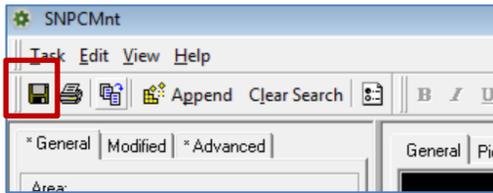
Since you are creating a brand new card, there is no need to customize your preference and copying options. Leave the checkmarks as is.

13. Click **Next**. The Copy Wizard – Finished window displays.



14. Verify the information is correct.

15. Click **Finish** to complete the copy process or click **Cancel** to cancel the transaction.



16. Click **Save**.

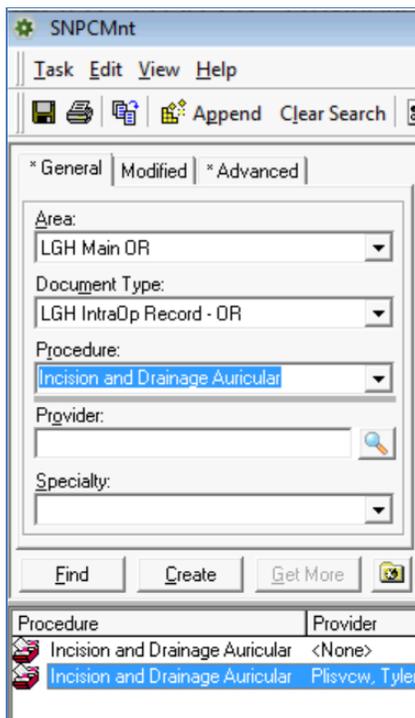
You have now copied on surgeon’s card to a newly created card for another surgeon.

## 2 Copy specific details from an existing Preference Card to another existing Preference Card

The Copy Wizard allows you to copy specific details from one preference card to another. For example, if surgeon A wants to have the same defaults and/or supplies on one of his cards as another, you can copy the existing defaults and supplies from one preference card to the other.

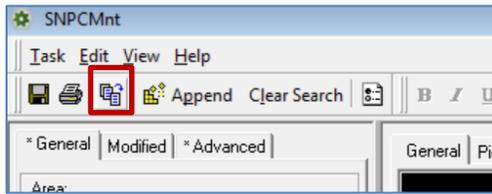
**Note:** To copy from multiple cards or to copy information from one surgical area to another, use the Preference Card Advanced Copy Tool.

Complete the following steps to copy from one preference card to another:



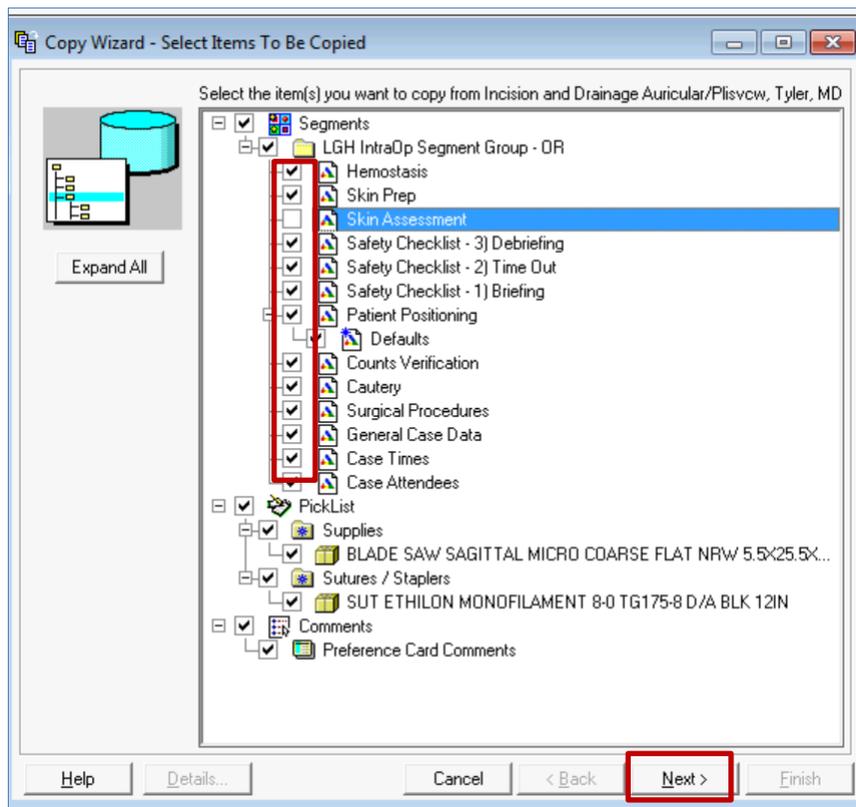
1. Search and find the Incision and Drainage preference card for Dr. Plisvcw, Tyler to copy.

2. Highlight the card.



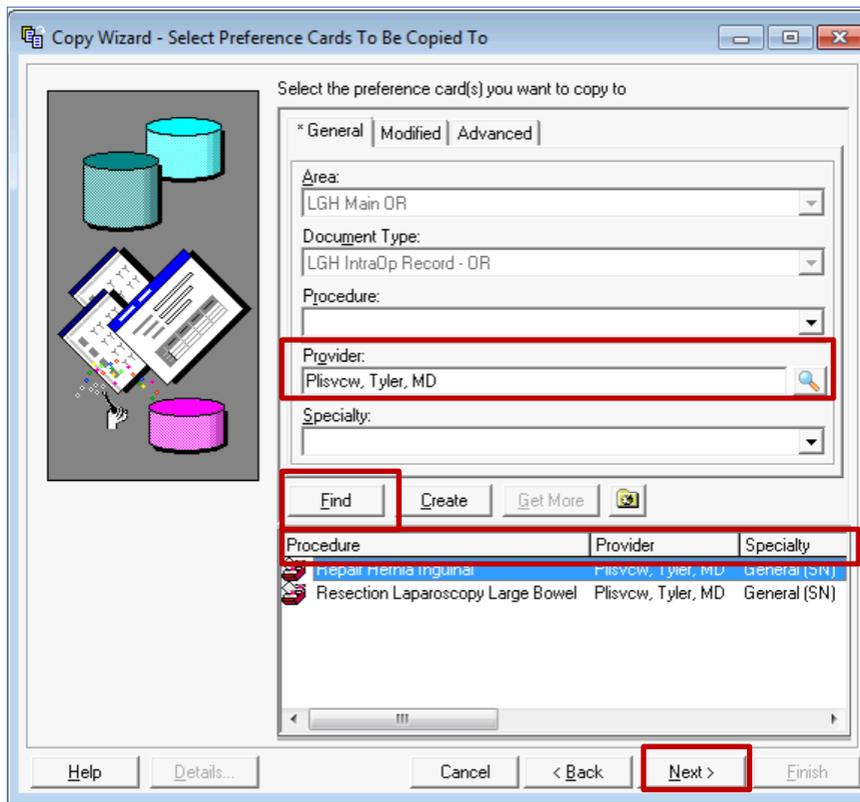
3. Click the **Copy To** button

- This opens the Copy Wizard.



4. Select or deselect the segments, items, and comments that you want to copy by unchecking or leaving the boxes checked. This determines what will be copied.

5. Click **Next**



6. In the Next screen, enter search criteria of:

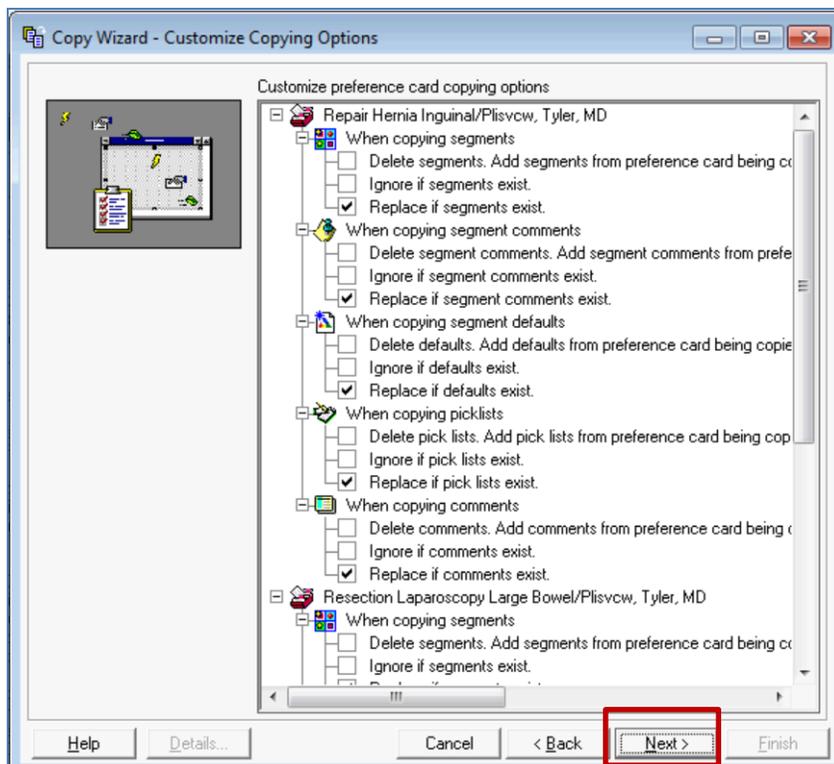
- Provider = *Plisvcw, Tyler*

7. Click **Find**, Cards populate to the grid below based on the search criteria used

8. Select *Repair Hernia Inguinal* under Procedures

9. Click **Next**.

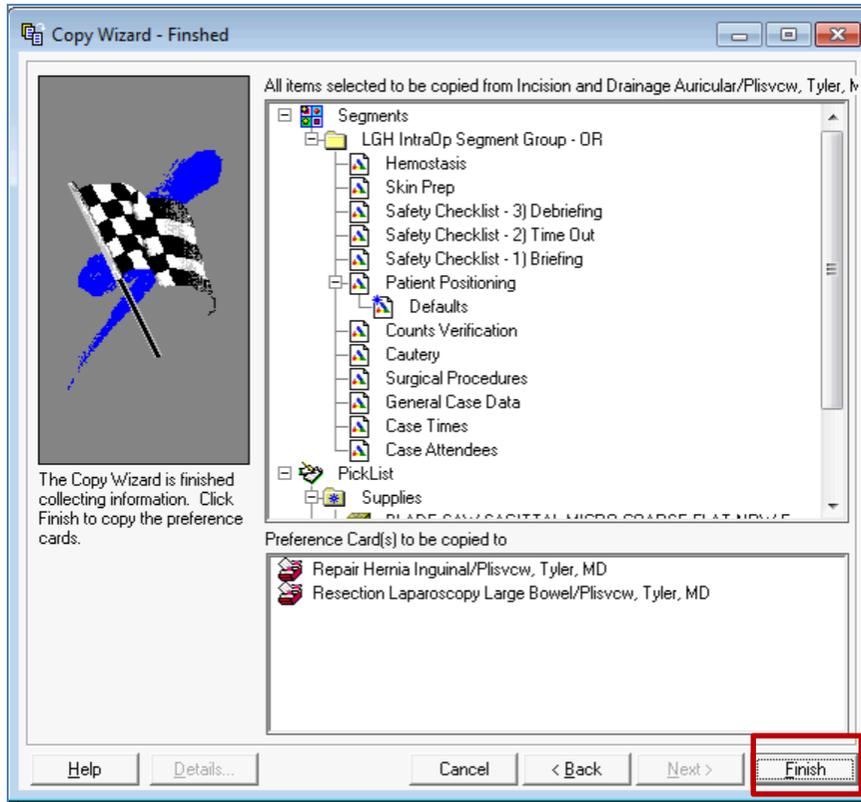
**Note:** All the cards displayed in the find box are copied to. If the search results return cards that you do not want to copy to, you can right-click and remove them from the list.



10. You can customize your preference and copying options by selecting:

- **Delete:** If any information already exists on the card being copied to, then all of it is deleted.
- **Ignore:** If any information is duplicated on the two cards, then the information already on the card remains.
- **Replace:** If any information is duplicated on the two cards, then the information on the card being copied from overwrites whatever information is already on the card.

11. Do not make any changes, leave as is. Click **Next**.



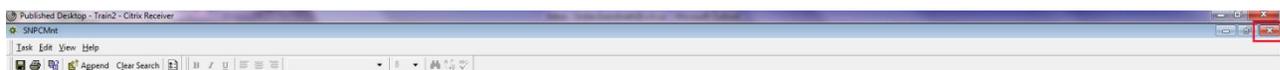
11. The confirmation screen populates
12. Verify the information is correct. Click **Finish** to complete the copy process (click Cancel to cancel the transaction).
13. Click **Save**.

### 3 Copying Preference Cards using Multiple Criteria with the Advanced Copy Tool

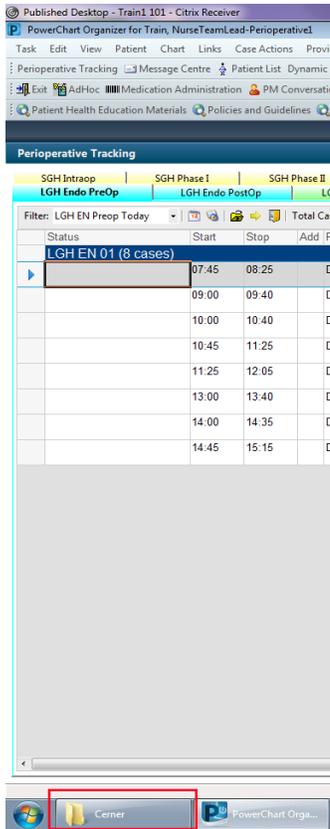
The Preference Card Advanced Copy Tool is designed to provide a wizard that allows you to complete copies across multiple criteria with guidance to ensure the resulting copies generate valid cards.

As a specific copy type and source cards are selected, the system guides you to the appropriate types of target cards. This ensures that cards copy over by multiple criteria.

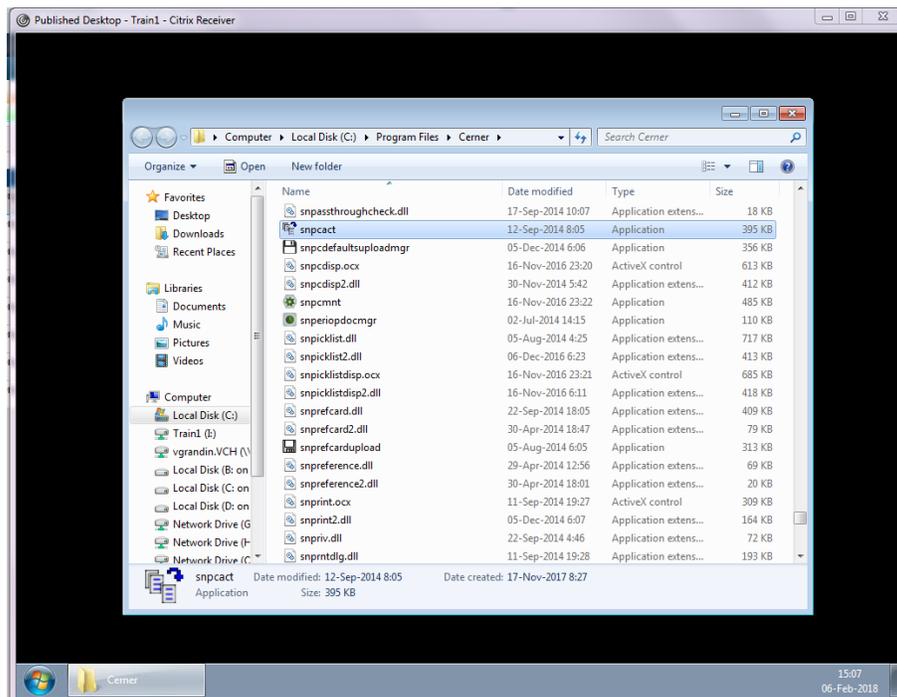
Complete the following steps to utilize multiple criteria to copy Preference Cards:



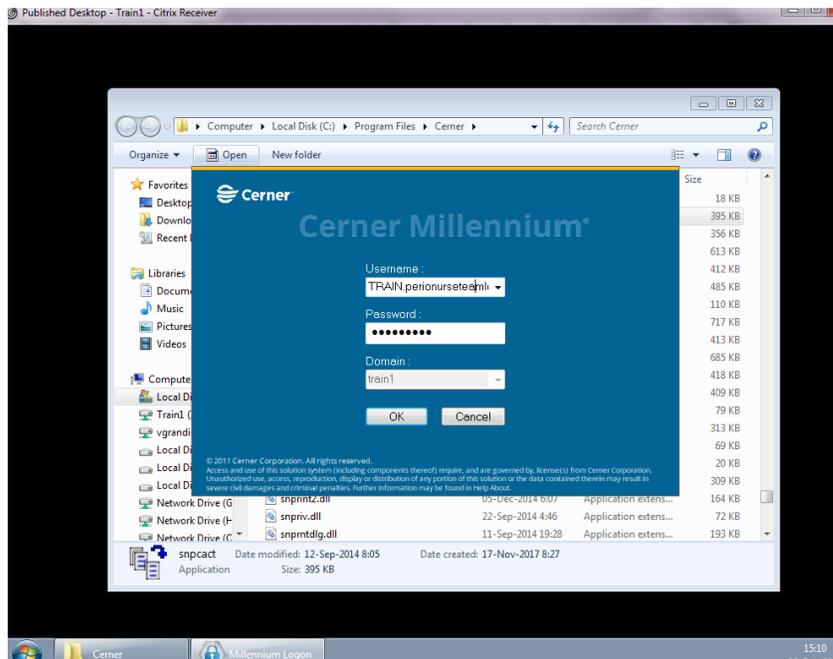
1. Close the Preference Card Maintenance window



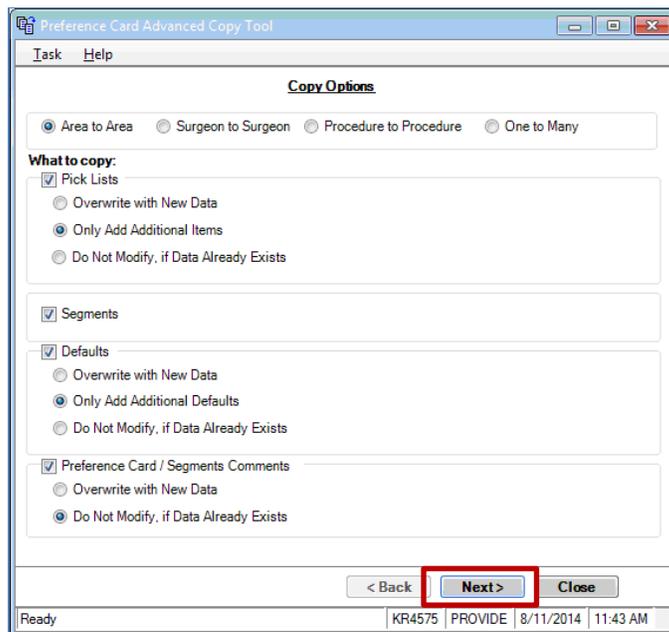
2. Click on the Cerner folder



3. Search for *snpcact* and double-click on it.

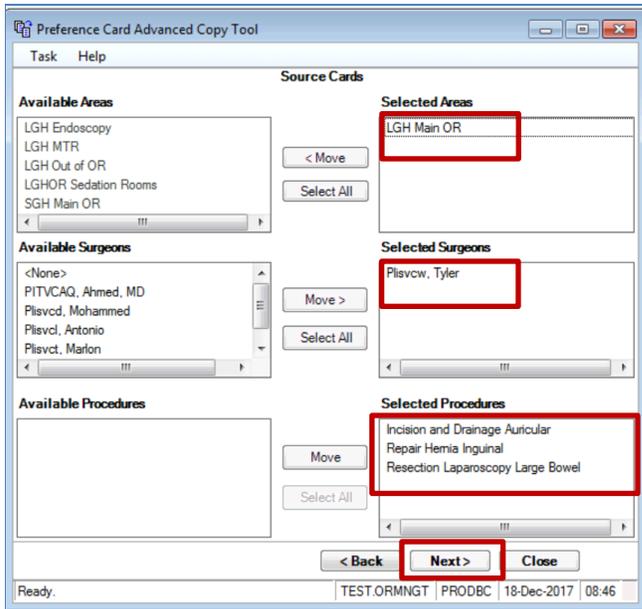


#### 4. Login

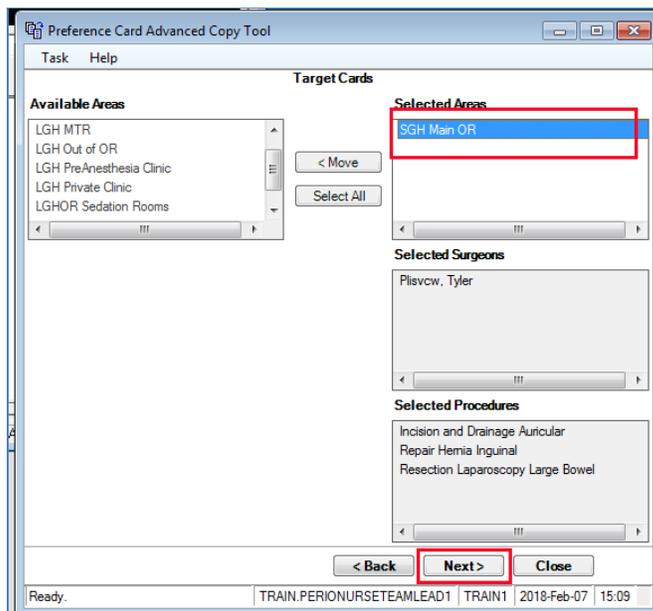


The Copy Options box opens with four options: Area to Area, Surgeon to Surgeon, Procedure to Procedure, One to Many.

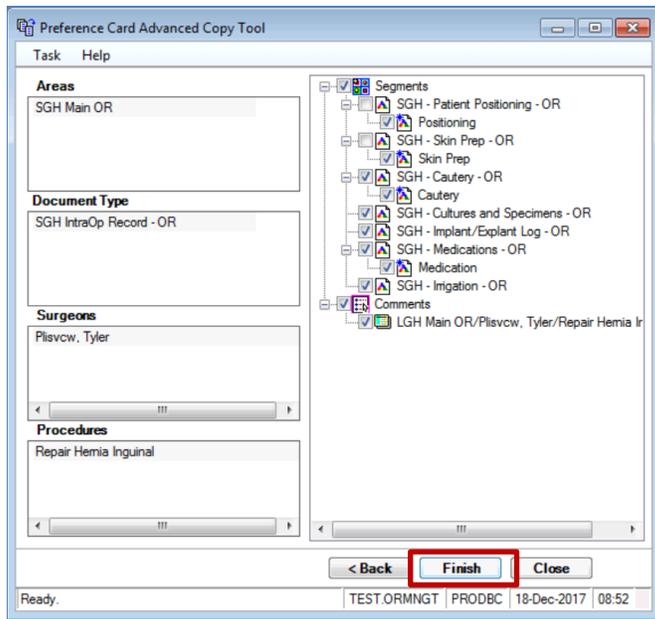
1. Select the option Area to Area
  - Check boxes for what to copy: Pick List, Segments, Defaults, Preference Card/Segments Comments. The copy criteria for each section will populate.
2. Click **Next**



3. Select the Source Card criteria. **Click** in the Available boxes and **Move** to the Selected boxes:
  - Areas: *LGH Main OR*
  - Surgeons: *Plisvcw, Tyler*
  - Procedures: *Move all the procedures over*
4. Click **Next**.

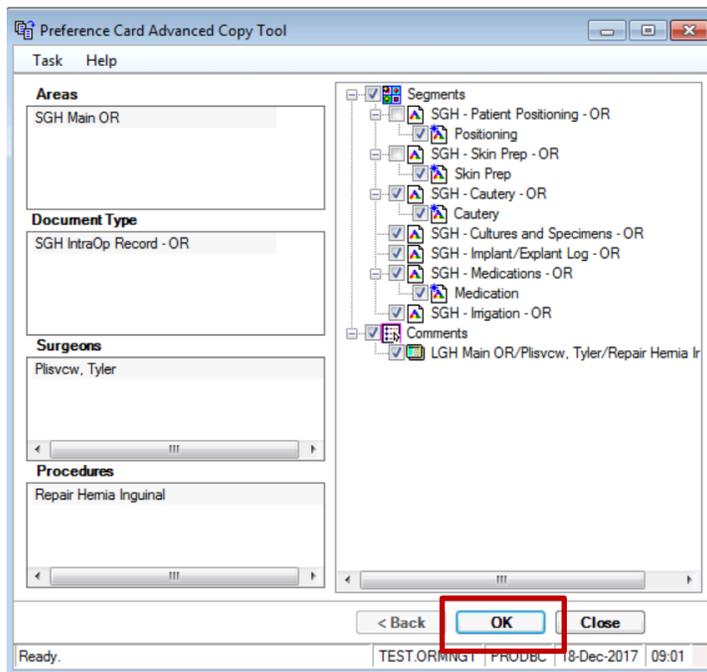


5. Select the Target Cards criteria:
  - Area: *SGH Main OR*
5. Click **Next**

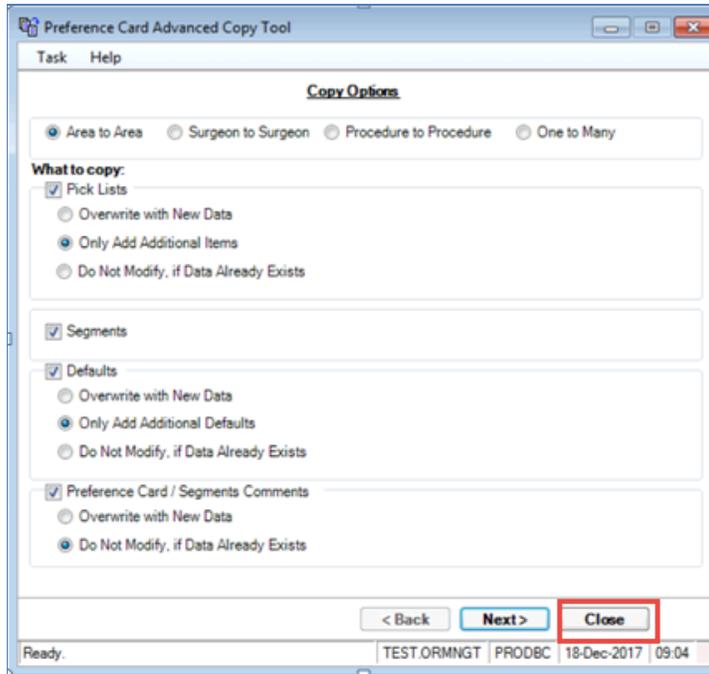


6. Review the summary window. If everything looks correct, click **Finish**.

**Note:** Clicking Close will exit out of the application completely.



7. Click **OK**



8. The original copy settings window populates.
9. Click **Close**

### Key Learning Points

-  You will be able to utilize the Copy Wizard to copy entire cards to create new cards.
-  You will be able to utilize the Copy Wizard to copy specific details from one card to another
-  You will be able to utilize the Advanced Copy Tool to copy cards utilizing multiple criteria.

## End of Workbook

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