SELF- GUIDED PRACTICE WORKBOOK [N44] CST Transformational Learning

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



TRANSFORMATIONAL LEARNING

Last update: February 20, 2018 (v2)



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SELF-GUIDED PRACTICE WORKBOOK

Duration	1 hour 30 min
Before getting started	 Sign the attendance roster (this will ensure you get paid to attend the session) Put your cell phones on silent mode
Session Expectations	 This is a self-paced learning session A 15 min break time will be provided. You can take this break at any time during the session The workbook provides a compilation of different scenarios that are applicable to your work setting Work through different learning activities at your own pace
Key Learning Review	 At the end of the session, you will be required to complete a Key Learning Review This will involve completion of some specific activities that you have had an opportunity to practice through the scenarios.



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

1



Activity 1.1 – Preference Card Maintenance

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:

🔅 SurgiNet: Preference Card Maintenance	
]] <u>T</u> ask <u>E</u> dit <u>V</u> iew <u>H</u> elp	
📗 🖶 🚭 🕞 📫 Append 🛛 Clear Search 📰	B <i>I</i> <u>U</u>
General Modified Advanced	General Pick
- 110-21	
(ALL)	Specialty:
Document Tupe:	1
Latte	Total Cases:
(ALL>	I
Procedure:	
Provider:	
Specialty:	
Find Create Get More 🥑	
Procedure Provider Specialty Area Doc	
received in the second state in the second sta	

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.

* General Modified * Advanced							
Of Types: Segments							
Surgical Area: Docu <u>m</u> ent Type:							
LGH Main OR 💌 LGH IntraOp Rec 💌							
Patient Positioning							
Safety Checklist - 1) Briefing							
🗌 🗌 Safety Checklist - 2) Time Out 🛛 👻							
Find Preference Cards Containing:							
🖃 🗹 Segments							
✓ Patient Positioning							

• When a filter(s) are applied on a tab, an asterisk is displayed in front of the filter name. For example: *Advanced 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 M	odified Advanced	1								
Area:										
LGH Main OR										
Document Type:										
LGH IntraO	Record - OR	_								
Procedure:		4								
		_								
Pr <u>o</u> vider:										
4										
Specialty:										
General (SN)	_								
<u>F</u> ind	<u>C</u> reate <u>G</u>	et More								
Procedure 6										

- 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



	0 11 - D C 0 - D C						
æ.	SurgiNet: Preference Card Maintenance						
I	ask <u>E</u> dit <u>V</u> iew <u>H</u> elp						
	🖁 🥶 📲 🖺 Kappend 🛛 Clear Search	8:-					
× (Consection of the section of	— r	_				
'	General Modified Advanced	-1	Ge				
Area:							
LGH Main OB							
	Desument Tures						
լլե	L GH Justra Op Beaserd - OP						
	LGH IntraUp Record - UR						
	Piocedure:						
	<u>•</u>						
F	Pr <u>o</u> vider:	111					
ШГ							
, c	ipecialtu:						
	Beneral (SN)	111					
-							
	<u>Find</u> <u>Create</u> <u>Gi</u> et More	2					
Pro	ooduro						
	Adrenalectore	A.					
2	Amendation Above Knop						
2	Amputation Above Knee						
۲	Amputation Below Knee						
2	Amputation Foot	=					
2	Amputation Toe	=					
3	Anoplasty						
3	Appendectomy						
3	Appendectomy Laparoscopy						
3	Appendectomy Laparoscopy Pediatric						
3	Biopsy Abdominal Mass						
2	Biopsy Excision Cyst Neck Gland						
2	Biopsy Lymph Node Neck						
2	Breast Biopsy (no prior needle biopsy)						
Ş	Breast Biopsy (no prior needle biopsy) with F						
Ş	Cholecystectomy						
Ż	Cholecystectomy Cholangiogram						
Ż	Cholecystectomy Laparoscopic						
١	Cholecystectomy Laparoscopy with Cholang						
١	Closure Colostomy or Ileostomy						
١	Llosure Laparoscopy Colostomy						
R.	Colonoscopy Polypectomy Stoma						
2	Lolostomy						
2	Depuiking Lumph Nede Avillem						
2	Dissection Lymph Node Axillary						
2	Dissection Lymph Node Inguinal						
8	Dissection Lymph Node Neck						
8	Excision Mammary Duct						
8	Exploration wound Esseciatomy Lower Extremity						
8	Fasciolomy Lower Extremity						
8	Fundablication Nissen Laboracopic	+					
	m undoplication Missen Laparoscopic						
-	· · · · · · · · · · · · · · · · · · ·		_				
Rea	adu						

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:

General Modified Advance	d]	General Pick List Segments Comments
Åsen.	<u> </u>	Connect I that back Deginieries Commissions
LGH Main OR	-	Specially.
Document Type:		
LGH IntraOp Record - OR	•	Total Cases:
Pjocedure:		1
Incision and Drainage Auricular	-	
Pt <u>o</u> vider:		
Plisvow, Tyler, MD	۹.	
Specially:		
General (SN)	-	
eu Loui IV	Saura El aut	
End Lreate	aet More	
ocedure	Provider	
Incision and Drainage Auricul	ar Plisvow, 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:



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:

General Pick List Segments	
Preference Card Comment Surgeon Comments <plisve -="" 1)="" 3)="" assessment="" attendees="" bri="" case="" cautery="" checklist="" counts="" data="" de="" general="" patient="" positioning="" prep="" procedures<="" reference="" safety="" segment="" skin="" surgical="" td="" text="" times="" verification=""><th>.::] ></th></plisve>	.::] >

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



Preference Card Comments	have disco music in the room
Surgeon Comments <plisvcw, md="" tyler,=""></plisvcw,>	

- 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 licon 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	00000664	→ « A <u>d</u> a	t	
L ا			Item Number	Dpen Qty	Hold Qty
7 I		SUT ETHILON MONOFILAMENT 8-0 TG175-8 D/A BLK 12	IN 0000252	U	U
-					

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

General Pick List Segments Comments						
Incision and Drainage Auricular/Plisvow, Tyler, MD						
		Description	Item Number	!	Open Qty	Hold Qt
		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:

eneral Pick List Segments Comments	_		I		
Incision and Drainage Auricular/Plisvcw, Tyler, MD	sut v		⊸ ≪ A <u>d</u> d		
		Description	Item Number 🚦	Open Qty	Hold Qty
		SUT ETHILON MONOFILAMENT 8-0 TG175-8 D/A BLK 12	2IN 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.

싫 Find: All Items		- • •
General Item Type	Advanced	
 Item number Clinical descript Search For: 	Image: Description Image: Short description ion Mfr catalog number Other: Begins with Image: Superstand su	Find Now New Search Get More Help
Location:	Include sublocations	
Class:	Browse Include subclassifications	
C Vendor:	×	
C Manufacturer:	*	
	OK	Cancel

- 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)

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ral Pick List Segments Comments				
Incision and Drainage Auricular/Plisvcw, Tyler, MD	SUT VICRYL CTD BRAID 3-0 PS-2 UNDYED 18IN	A <u>d</u> d		
	Description	Item Number 🚦	Open Qty Ho	ld Qiy
	SUT VICRYL CTD BRAID 3-0 PS-2 UNDYED 18IN	00000664		_
	SUT ETHILON MONOFILAMENT 8-0 TG175-8 D/A BLK 12IN	00000252	00	

- 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:



eneral Pick List Segments Comments						
Incision and Drainage Auricular/Plisvcw, Tyler, MD	<u>SUT</u>	VICRYL CTD BRAID 3-0 PS-2 UNDYED 18IN	*	A <u>d</u> d		
	1	Description	Ite	m Number 🚦	Open Qty	Hold Qty
		SUT VICRYL CTD BRAID 3-0 PS-2 UNDYED 18IN SUT ETHILON MONOFILAMENT 8-0 TG175-8 D/A BLK 12IN	×	<u>D</u> elete	10 h	2
	μ.			Select <u>A</u> ll	ľ	0
			P	<u>P</u> roperties		
			8 :-	Options		
					-	

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

Note: Warning is displayed and asks for confirmation

Delete Item		83
Are you sure you want to delete UNDYED 18IN?	SUT VICRYL CTD BRA	ID 3-0 PS-2
	Yes	No

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:



* General Modified Advanced	General Pick List Segments Comments	
Area:	Selected	Available
LGH Main OR 🔹	Incision and Drainage Auricular/Plisvcw, Tyler, MD	LGH Main OR/LGH IntraOp Record - OR
Document Tuper	다. IGH IntraOp Segment Group - OR	🔽 📮 LGH IntraOp Segment Group - OR
L CH Jaka Da Record OR	Case Attendees	🚽 🕘 – \Lambda Additional Lower Endoscopy Detail
	- Case Times	Case Attendees
P <u>r</u> ocedure:	- General Case Data	-A Case Times
Incision and Drainage Auricular	Surgical Procedures	- A Catheters
Provider:	Cautery	- A Cautery
	Counts Ventication	- Lounts Ventication
Consider	-A Hemostasis	- A Delays/Lase Lancellation
Specially:	A Patient Positioning	Diation Diation
· ·	Safety Checklist - 1) Direling	Direction / Packing
	Safety Checklist - 2) Time Out	Drossing/T duking Drossing/T duking Drossing/T duking
<u>Find</u> <u>Create</u> <u>G</u> et More	Skin Assessment	
	Skin Prep	- A Feeding Device
Procedure Provider		- A Foreign Body Retrieval
Incision and Drainage Auricular (None)		- S General Cace Data
incision and Drainage Auticular Prisvow, Tyler		- A Hemostasis 3
0		- A Immediate Use Steam Sterilization
-		- A Implant/Explant Log
		- A Incorrect Counts Action Taken
		- A Injection
		- \Lambda Insufflation
		Laser Data
		Laser Safety
		Medications
< Þ		

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:



General Lase Data				A Lase	imes
Surgical Procedures	Patient Positioning				- • 💌
Counts Verification	Auto Default De	efault	Procedure	Body Pos	ОК
Counts Verification Hemostasis Patient Positioning Safety Checklist - 1) Briefing Safety Checklist - 2) Time Dut Safety Checklist - 3) Debriefing Skin Assessment Skin Prep	Auto Default Default III Automatic Default Default Name: position Procedure: Associate to procedure(s) Ø Body Position: Supine Left Arm Position: Image: Comparison of the procedure of the position: Left Arm Position: Image: Comparison of the position: Left Arm Position: Image: Comparison of the position:	efault	Procedure	Body Pos	OK Cancel
	Add Modify Remov	/e Clear			< Prev Next>>

- 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



Auto Default	Default	Procedure	Body Pos	UN
	position		Supine	Cancel
				Þ
Automatic Def	nuk			
) Automatic Den	Buit			
<u>Pe</u> rault Manie.				
Procedure:				
Associate to p	rocedure(s)			
Body Position:		Head Positioning Device:		
	•		•	
eft Arm Position				
eft Arm Position:				
	•			
.e <u>f</u> t Arm Protected Wit	h:			
	• <u>>></u>			

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:

LGH IntraOp Segment Group - OR Case Attendees Gases Times Ganeral Case Data					ntraOp Segment Group - OR ditional Lower Endoscopy Detail se Attendees se Times
- Surgical Procedures	Patient Positioning				
Counts Verification Patient Positioning	Auto Default	Default	Procedure	Body Pos	ОК
Selev Deckter 1 Diaring Saley Checkter 2 Time Du Saley Checkter 2 Time Du Saley Checkter 3 Debieling Saley Checkter 3 Debieling Skin Arsessment Skin Prep	Auto Default	dure(:)	Head Positioning Device:	Body Pos Supine	Cancel i i i i i i i i i i i i i
	Add Modify	Remove Clear			<< Prev Next>>

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

Auto Default	Default	Procedure	Body Pos	OK
	position		Supine	Cancel
<				Þ
Automatic Defa	ult			
D <u>e</u> fault Name:				
position				
- Procedure:				
Associate to pro	ocedure(s)			
Body Position:		Head Positioning Device	e:	
Supine	<u> </u>		•	
Lateral - Left Modified Lateral - Right Modified Lateral Left (left side do	wn)			
Lithotomy	downj			
final a filine a				
Lithotomy - High				
Lithotomy - High Lithotomy - Low Lithotomy - Ultra Low	-			
Lithotomy - High Lithotomy - Low Lithotomy - Ultra Low Prone	≡ ▶			
Lithotomy - High Lithotomy - Low Lithotomy - Ultra Low Prone Beverse Trendenlenbu Semi-Fowler's				
Lithotomy - High Lithotomy - Low Lithotomy - Ultra Low Prone Reverse Trendenlenburg Trendenlenburg				
Lithotomy - High Lithotomy - Low Lithotomy - Ultra Low Prone Bewerse Trendenlenbur Semi-Fowler's Trendenlenburg Other - See Segment T				
Lithotomy - High Lithotomy - Low Lithotomy - Ultra Low Prone Beverse Trendenlenbu Semi-Fowler's Trendenlenburg Other - See Segment T	ext			
Lithotomy - High Lithotomy - Low Lithotomy - Ultra Low Prone Reverse Trendenlenbu Semi-Fowler's Trendenlenburg Other - See Segment T	ext T			
Lithotomy - High Lithotomy - Low Lithotomy - Ultra Low Prone Beverse Trendenlenbu Semi-Fowler's Trendenlenburg Other - See Segment T	ext T			
Lithotomy - High Lithotomy - Low Lithotomy - Ultra Low Prone Reverse Trendenlenburg Semi-Fowler's Trendenlenburg Other - See Segment T				



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

Patient Positioning				
\uto Default	Default	Procedure	Body Pos	ОК
	position		Semi-Fowler's	Cancel
•			4	
🔲 Automatic Default				
D <u>e</u> fault Name:				
position				
Procedure:				
Associate to procedur	e(s)			
√ Body Position:	<u>H</u> e	ad Positioning Device:		
Semi-Fowler's	•	•		
Left Arm Position				
	•			
Left Arm Protected With:	_			
	• >>			
1	<<			
Add Modify Re	move		<	<pre></pre>

- 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.

1



Activity 1.2 – Global Pick List Update

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.

* General M	1odified * Advanced	_1
Of Types:	Segments 💽	1
Surgical Are	a: Docu <u>m</u> ent Type:	1
LGH Main	OR 💌 LGH IntraOp Rec 💌	
Caute	ery 🔺	1
Coun	ts Verification	
🗌 🗌 Delay	vs/Case Cancellation 👻	
Find Prefere	ence Cards Containing:	
🗆 🖃 🗹 Se	egments	
	Cautery	
		-
<u> </u>	<u>C</u> reate <u>G</u> et More	2
		_
Procedure		
Procedure J Adrenalect	tomy	•
Procedure Adrenalect Amputation	tomy n Above Knee	
Procedure Adrenalect Amputation Amputation	tomy n Above Knee n Below Knee	•
Procedure Adrenalect Amputation Amputation Amputation	tomy n Above Knee n Below Knee n Foot	•
Procedure Adrenalect Amputation Amputation Amputation Amputation	tomy n Above Knee n Below Knee n Foot n Toe	•
Procedure Adrenalect Amputation Amputation Amputation Amputation	tomy n Above Knee n Below Knee n Foot n Toe	* ·
Procedure Adrenalect Amputation Amputation Amputation Amputation Anoplasty Appendec	tomy n Above Knee n Below Knee n Foot n Toe tomy	* III
Procedure Adrenalect Amputation Amputation Amputation Amputation Anoplasty Appendec	tomy n Above Knee n Below Knee n Foot n Toe tomy tomy Laparoscopy tomy Laparoscopy	- m
Procedure Adrenaleci Amputation Amputation Amputation Amputation Anoplasty Appendec Appendec Biossy Abs	tomy n Above Knee n Below Knee n Foot n Toe tomy tomy Laparoscopy tomy Laparoscopy Pediatric dominal Mace	* III
Procedure Adrenalect Amputation Amputation Amputation Amputation Amputation Anoplasty Appendec Appendec Appendec Biosy Aby Biosy Exp	tomy n Above Knee n Below Knee n Foot n Toe tomy Laparoscopy tomy Laparoscopy Pediatric dominal Mass	* III
Procedure Adrenaleci Amputation Amputation Amputation Anoplasty Appendec Appendec Biopsy Abs Biopsy Luc Biopsy Luc Biopsy Luc	tomy n Above Knee n Foot n Toe tomy tomy Laparoscopy tomy Laparoscopy Pediatric dominal Mass cision Cyst Neck Gland onb Node Neck	* III
Procedure Adrenalect Amputation Amputation Amputation Amputation Appendec Appendec Biopsy Abd Biopsy Exc Biopsy Exc Biops	tomy n Above Knee n Below Knee n Foot n Toe tomy Laparoscopy tomy Laparoscopy Pediatric dominal Mass cision Cyst Neck Gland nph Node Neck spu fno nric needle bionsy)	* III
Procedure Adrenalect Amputation Amputation Amputation Amputation Appendec Appendec Biopsy Abu Biopsy Lyn Breast Bio Breast Bio Breast Bio	tomy n Above Knee n Below Knee n Foot n Toe tomy Laparoscopy tomy Laparoscopy Pediatric dominal Mass cision Cyst Neck Gland nph Node Neck psy (no prior needle biopsy) psy (no prior needle biopsy)	A
Procedure Adrenaleci Amputation Amputation Amputation Anoplasty Appendec Appendec Biopsy Aby Biopsy Lyn Breast Bio Breast Bio Cholecvate	tomy n Above Knee n Below Knee n Foot n Toe tomy Laparoscopy tomy Laparoscopy Pediatric dominal Mass cision Cyst Neck Gland nph Node Neck psy (no prior needle biopsy) psy (no prior needle biopsy) with F sctomy	* III

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

🗄 Add	Items 🗙 Delete Items 🖫 Replace Items 🗟 Options	
Add Item:		
Open Qty:	0 Hold Qty: 0	
	Add to L	.ist

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

Item number	Description	Short description			FINUNO
Clinical description	n 🗌 Mfricatalog number	Other:		v	New Sear
Search For:	Includes				Get Mon Help
Location:				v	
🗆 Class:	Include sublocations Include subclassifications Include subclassifications			Browse	
O Vendor:				«	
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m Number	Description	Short Description	Clinical Description	ltem Type	Status
m Number 003956 019714 036747	Description PENCIL ELECTROSURGICAL W/ROCKER SWITCH 15FT CO NDL SPINAL WHITACRE PENCIL POINT 25GAX3-1/2IN PENCIL ELECTROSURGICAL ACCU-TIP W/DRAPE	Short Description PENCIL ELECTROSURGICAL W/R DDL SPINAL WHITACRE PENCIL P PENCIL ELECTROSURGICAL ACCU	Clinical Description	Item Type Item Master Item Master Item Master	Status Active Active Active
m Number 003956 019714 0477 04117 112153 113386 1404140	Description PENCIL ELECTROSURGICAL W/ROCKER SWITCH 15FT CO NDL SPINAL WHITACRE PENCIL POINT 25GA/S1/2/N PENCIL ELECTROSURGICAL ACCULTIP W/DRAPE PENCIL CALIT BOLLOVAC SMOKE EVAC PUSH BUTTON 10FT HOLSTRE ELECTROSURGICAL PENCIL COMMED PENCIL CAUT GOLDVAC SLIM SMOKE EVAC PUSH BUTTON LGH ELECTRODE PENCIL LAPAROSCOPIC - DR. QUEH 2 PCS	Short Description PENCIL ELECTROSURGICAL W/R NDL SPINAL WHITACRE PENCIL P PENCIL ELECTROSURGICAL ACCU PENCIL CAUT GOLDVAC SMOKE E. HOLSTER ELECTROSURGICAL PE PENCIL CAUT GOLDVAC SLIM SMO LGH ELECTRODE PENCIL LAPARO	Clinical Description	Item Type Item Master Item Master Item Master Item Master Item Master Item Master Equipment Master	Status Active Active Active Active Active Active Active

- 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.



🔁 Add	👩 Add Items 🖞 Delete Items 🖞 Seplace Items 🖹 Options				
Add Item:	PENCIL CAUT GOLDVAC SMOKE EVAC PUSH BUTTON 10FT	*			
Open Qty:	0 над Фу- 0				
		Add to List			

15. Click Add to List.

Task Edit View Help			
🛢 🚳 💱 💕 Append Clear Search 🔝 🛛 🗉	$ \mathbf{x} \mathbf{\overline{n}} \mathbf{\overline{n}} \mathbf{\overline{n}} \mathbf{\overline{n}} \mathbf{\overline{n}} $	- a - 萬倍少	
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Find Preference Cards Containing		E) ADD FENCE CAD FAULD MAKE SMOKE CVAR, FOSH BOTTOM TOFT MIT OPEN UTV OF AUTOMATING UTV () IT WITTO THE INFORMATION OF AUTOMATION OF AUTOMATICA AUTOMATION OF AUTOMATION OF AUTOMATION OF AUTOMATION OF AUTOMATION OF AUTOMATICA AUTO AUTOMATICA AUTOMATICA AUT	
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Procedure	Provider 4		
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Amputation Foot	<none></none>		
Amputation Toe	(None)		
Appendictomy	(None)		
Appendectomy Laparoscopy	(None)		
Appendectorry Laparoscopy Pediatric	<none></none>		
Biopsy Abdominal Mass	(None)		
Biopsy Excision Cyst Neck Gland	(None>		
Breast Bionsy Inc minr needle bionsyl	(None)		
Breast Biopsy (no prior needle biopsy) with Fine Wire	(None)		
Cholecystectomy	(None)		
Cholecystectomy Cholangiogram	(None)		
Cholecystectomy Leparoscopic	(None)		
Closure Colostanu or lisostanu	(None)		
Closure Laparoscopy Colostomy	(None)		
Colonoscopy Polypectomy Stoma	(None)		
Colostony	(None)		
Distantion Lunch Node Avilanu	(None)		
Dissection Lymph Node Inquinal	(None)		
Dissection Lymph Node Neck	<none></none>		
Excision Mammany Duct	<none></none>		
Exploration Wound	(None)		
Fasciolomy Lower Extremity	<none></none>		
Fundoplication Nissen Laparoscopic	<none></none>		
Gastrectomy	<none></none>		
Gastrojejunostomy	(None)		
Gastrodomy	(None)		
Hemicolectomy Linktony	(None)		
Hemonhoidectomy	(None)	• ['	
<	,		RunUpdate

- 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.

Print Report		
?	The update has completed successfully. What would you like to do with the report?	
	Printer: Copies: 0	
Print Setup.	Pre <u>v</u> iew <u>Print</u> Close	

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



<u>T</u> ask <u>E</u> dit <u>V</u> iew <u>H</u> elp	
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* General Modified * Advanced	Ge

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



t Options				
Search Pick List Global Pick List Copy				
When copying segments Delete segments. Add segments from preference card being copied Ignore if segments exist. Wen copying segment comments Delete segment comments. Add segment comments from preference Multiple Location Views Found				
The application was unable to resolve to one location view. Please choose one to continue: Pharmacy Buyer Inventory View				
VCH Pharmacy Inventory View VPPC Pharmacy Inventory View				
DK gd				
OK Cancel Apply				

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

it	3 Options	×
-	Search Pick List Global Pick List Copy	
	Add Replace Print Location	
1	When adding an item that ALREADY EXISTS on a preference card:	
	C Update Open/Hold Quantity with new Open/Hold Quantity	
	Default Open/Hold Quantities:	
	Open Quantity: 1	
	Hold Quantity: 0	
	OK Cancel Appl	y

- 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.

1. Options		
Search Pick List Global Pick List Copy		
Add Replace Print Location		
When performing a replace:		
Use the quantities specified in this application		
When replacing with an item that ALREADY EXISTS on a preference card:		
 Use the quantities of the existing new item 		
C Use the quantities of the old item		
C Use the quantities specified in this application		
C Leave this preference card alone; provide details in Summary Report		
Default Open/Hold Quantities		
Ogen Quantity: 0		
Hold Quantity: 0		
OK Cancel Apply		

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.

🖏 Options
Search Pick List Global Pick List Copy
Add Replace Print Location
Print Summary and Exception Report Only
C Print Detail Report along with Summary and Exception Report
OK Cancel Apply

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

1



Activity 1.3 – Copy Wizard

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:

* General Modified Advanced
<u>A</u> rea:
LGH Main OR 🗾
Document Type:
LGH IntraOp Record - OR
P <u>r</u> ocedure:
Incision and Drainage Auricular 📃
Pr <u>o</u> vider:
Plisvow, Tyler, MD
Specialty:
General (SN)
Find Create Get More
Procedure Provider
Incision and Drainage Auricular Plisvow, 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



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

🔓 Copy Wizard - Sele	ect Items To Be Copied 📃 🗖 💌
Expand All	Select the item(s) you want to copy from Incision and Drainage Auricular/Plisvow, Tyler, MD Select the item(s) you want to copy from Incision and Drainage Auricular/Plisvow, Tyler, MD General LGH IntraOp Segment Group - OR General Casesment Safety Checklist - 3) Debriefing Safety Checklist - 3) Debriefing Safety Checklist - 2) Time Out Safety Checklist - 1) Briefing Counts Verification Cautery Surgical Procedures General Case Data Case Times Case Attendees Surgical Procedures Sutures / Staplers Sutures / Staplers Sutures / Staplers Sutures / Staplers Preference Card Comments
<u>H</u> elp <u>D</u> e	tails Cancel < <u>B</u> ack <u>N</u> ext > <u>F</u> inish

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



Copy Wizard - Select Preference	e Cards To Be Copied To
Sector And a sector of the sec	elect the preference card(s) you want to copy to * General Modified Advanced Area: LGH Main OR Document Type: LGH IntraOp Record - OR Procedure: Incision and Drainage Auricular Provider:
	Plisvcx, Stuart, MD Specialty:
Help Details	Cancel

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.



Copy Wizard - Customize Copy	ing Options
Copy Wizard - Customize Copy	ing Options
Help	Cancel < <u>B</u> ack

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.

SNPCMnt		
Tack Edit View Help		
🔚 🚭 📴 📫 Append 🛛 Clear Search 🗈	BI	Ū
* General Modified * Advanced	General	Pic

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:

SNPCMnt
<u>]</u> <u>T</u> ask <u>E</u> dit <u>V</u> iew <u>H</u> elp
📗 🖶 🚭 🕞 📫 Append 🛛 Clear Search 🛛 🗈
* General Modified * Advanced
Area:
LGH Main OR 🗾
Document Type:
LGH IntraOp Record - OR
P <u>r</u> ocedure:
Incision and Drainage Auricular
Provider:
Specialty:
<u>Find</u> <u>G</u> et More
Procedure Provider
Incision and Drainage Auricular <none></none>
Incision and Drainage Auricular Plisvow, Tyler

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



2. Highlight the card.

SNPCMnt		
<u>Task Edit V</u> iew <u>H</u> elp		
🛛 🖬 🖨 😭 🛍 Append 🛛 Clear Search 🔚	B <i>I</i> <u>U</u>	
* General Modified * Advanced General P		

- 3. Click the Copy To button
 - This opens the Copy Wizard.

Copy Wizard - Sele	ect Items To Be Copied	
Expand All	Select the item(s) you want to copy from Incision and Drainage Auricular Comparison of the iteration of the	/Plisvow, Tyler, MD
<u>H</u> elp <u>D</u> e	tails Cancel < <u>B</u> ack <u>N</u> ext :	> <u>F</u> inish

- 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



🖷 Copy Wizard - Select Prefere	nce Cards To Be Copied To	- • ×
	Select the preference card(s) you want to copy to	
	* General Modified Advanced Area: LGH Main OR Document Type: LGH IntraOp Record - OR Procedure:	
	Provider: Provider: Plisvow, Tyler, MD Specialty:	• •
	<u>Find</u> <u>Create</u> <u>G</u> et More	
	Procedure Provider	Specialty
	Thepair Hernia Inguinai Plisvow, Tyler, Resection Laparoscopy Large Bowel Plisvow, Tyler, III	MD General (SN) MD General (SN)
<u>H</u> elp <u>D</u> etails	Cancel < <u>B</u> ack <u>N</u> ex	t> <u>F</u> inish

- 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.



🕼 Copy Wizard - Customize	Copying Options			
Copy Wizard - Customize	Copying Options Customize preference card copying options Customize preference card copying options Peter segments. Add segments from preference card being cx Ignore if segments exist. Peter segment comments. Delete segment comments exist. Peter segment comments exist. Peter segment comments exist. Peter segment defaults Delete defaults. Add defaults from preference card being copie Ignore if defaults exist. Peter segment comments exist. Peter segment defaults Delete defaults. Add defaults from preference card being copie Ignore if defaults exist. Peter segment comments exist. Peter segment defaults Delete defaults. Add defaults from preference card being copie Ignore if defaults exist. Peter segment is the segment comments exist. Peter segment defaults from preference card being copie Ignore if defaults exist. Peter segment is the segment comments exist. Peter segment is the segment comments exist. Peter segment defaults from preference card being copie Ignore if defaults exist. Peter segment is the segment comments exist. Peter segment is the segment defaults from preference card being copie Ignore if defaults exist. Peter segment is the segment comments exist. Peter segment is the segment defaults from preference card being copie Ignore if pick lists exist. Peter segment is the segmen			
When copying comments Delete comments. Add comments from preference card being of Ignore if comments exist. Replace if comments exist. Resection Laparoscopy Large Bowel/Plisvow, Tyler, MD When copying segments Delete segments. Add segments from preference card being or Ignore if segments exist.				
Help Details	Cancel < Back Einish			

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.



🖫 Copy Wizard - Finshed	
The Copy Wizard is finished collecting information. Click Finish to copy the preference cards.	All items selected to be copied from Incision and Drainage Auricular/Plisvow, Tyler, M Comparison of the selected to be copied from Incision and Drainage Auricular/Plisvow, Tyler, MD All items selected to be copied from Incision and Drainage Auricular/Plisvow, Tyler, MD All items selected to be copied from Incision and Drainage Auricular/Plisvow, Tyler, MD All items selected to be copied from Incision and Drainage Auricular/Plisvow, Tyler, MD All items selected to be copied from Incision and Drainage Auricular/Plisvow, Tyler, MD All items selected to be copied from Incision and Drainage Auricular/Plisvow, Tyler, MD All items selected to be copied from Incision and Drainage Auricular/Plisvow, Tyler, MD All items selected to be copied from Incision and Drainage Auricular Plisvow, Tyler, MD All items selected to be copied from Incision and Drainage Auricular Plisvow, Tyler, MD All items selected to be copied from Incision and Drainage Auricular Plisvow, Tyler, MD All items selected to be copied from Incision and Drainage Auricular Plisvow, Tyler, MD All items selected to be copied from Incision and Drainage Auricular Plisvow, Tyler, MD All items selected to be copied from Incision and Drainage Auricular Plisvow, Tyler, MD All items selected to be copied from Incision and Drainage Auricular Plisvow, Tyler, MD All items selected to be copied from Incision and Drainage Auricular Plisvow, Tyler, MD All items selected to be copied from Incision and Plisvow, Tyler, MD All items selected to be copied from Incision and Plisvow, Tyler, MD All items selected to be copied from Incision and Plisvow, Tyler, MD All items selected to be copied from Incision and Plisvow, Tyler, MD All items selected to be copied from Incision and Plisvow, Tyler, MD All items selected to be copied from Incision and Plisvow, Tyler, MD All items selected to be copied from Incision and Plisvow, Tyler, MD All items selected to be copied from Incision and Plisvow, Tyler, MD All items selected to be copied from Incision and Plisv
Help Details	Cancel < <u>B</u> ack <u>N</u> ext>

- 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:

 Notified Database - Train2 - Clairis Receiver
 Image: Clairis Receiver
 Image: Clairis Receiver

 9 SMCMet
 Image: Clairis Receiver
 Image: Clairis Receiver
 Image: Clairis Receiver

 1 Sub State
 Image: Clairis Receiver
 Image: Clairis Receiver
 Image: Clairis Receiver

 Image: State
 Image: Clairis Receiver
 Image: Clairis Receiver
 Image: Clairis Receiver

1. Close the Preference Card Maintenance window



2. Click on the Cerner folder

Organize Computer > Local Disk (C) > Program Files > Center > Organize Open New folder Image: Computer > Center > </th <th></th> <th></th> <th></th> <th></th> <th></th> <th></th> <th></th> <th>1 - Citrix Receiver</th> <th>Published Desktop - Tr</th>								1 - Citrix Receiver	Published Desktop - Tr
Organize Open New folder Image: Computer > Local Disk (C) > Program Files > Cerner > 4 Search Cerner > > Organize Image: Computer > Local Disk (C) > Program Files > Cerner > 4 Search Cerner > > > Yerorites Image: Computer > Local Disk (C) > Program Files > Cerner > 4 Search Cerner > > <th></th> <th></th> <th></th> <th></th> <th></th> <th></th> <th></th> <th></th> <th></th>									
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Subtwork Drive (C Subtwork Drive (C Subtwork Drive C Subtwork Drive (C Subtwork Driv		-	93 KB	19	Application extens	11-Sep-2014 19:28	🚳 snprntdlg.dll	Network Drive (C	
snpcat Date modified: 12-Sep-2014 8:05 Date created: 17-Nov-2017 8:27						Date created: 17-Nov-2017 8:27	modified: 12-Sep-2014 8:05	snpcact Da	
Application Size: 395 KB							Size: 395 KB	Application	
Cemer	15:07							Street and a second	Cerner

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





4. Login

Preference Card Advanced Copy Tool	
<u>T</u> ask <u>H</u> elp	
Copy Options	
Area to Area Surgeon to Surgeon Procedure to Procedure	ocedure 💿 One to Many
What to copy:	
Overwrite with New Data	
Only Add Additional Items	
O Not Modify, if Data Already Exists	
Segments	
V Defaults	
Overwrite with New Data	
Only Add Additional Defaults	
Do Not Modify, if Data Already Exists	
Preference Card / Segments Comments	
Overwrite with New Data	
O Not Modify, if Data Already Exists	
< Back	Next> Close
Ready KR4	575 PROVIDE 8/11/2014 11:43 AM

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



Task Help			
	Source Cards		
Available Areas	Sele	ected Areas	
LGH Endoscopy	LGH	I Main OR	
LGH MTR			
LGH Out of OR	< Move		
LGHOR Sedation Rooms	Select All		
SGH Main OR	Select All		
< III	- P		
Available Surgeons	Sele	ected Surgeons	
<none></none>	Plisv	vcw, Tyler	
PITVCAQ, Ahmed, MD			
Plisvcd, Mohammed			
Plisvel, Antonio	Select All		
Plisvct, Marlon	+ Sciect Air		
< III	•	4 III	
Available Procedures	Sele	ected Procedures	
		tion and Derivers Andredes	
	Res	Respir Herris Induinal	
	Move	ection I anaroscony I arrae Rowel	
		ection caparoscopy carge bower	
	Select All		

- 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.

Preference Card Advanced Copy Tool					
Task Help					
	Target Cards				
Available Areas		Selected Areas			
LGH MTR LGH Ott of OR LGH PreAnesthesia Clinic E LGH Private Clinic LGHOR Sedation Rooms	< Move Select All	SGH Main OR			
4 III >		4 III >>			
		Selected Surgeons			
		< •			
Selected Procedures					
		Incision and Drainage Auricular Repair Hemia Inguinal			
		Resection Laparoscopy Large Bowel			
	< Bac	k Next> Close			
Ready. TRAIN.PERIONURSETEAMLEAD1 TRAIN1 2018-Feb-07 15:09					

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



Image: Segments Image: Segment
< III > < Back Finish Close

Review the summary window. If everything looks correct, click Finish.
 Note: Clicking Close will exit out of the application completely.

Preference Card Advanced Copy Tool	
Task Help	
Areas SGH Main OR	Gegments Gef - SGH - Patient Positioning - OR Gef - SGH - Patient Positioning Gef - SGH - Skin Prep - OR Gef - SKin Prep Gef - SGH - Cautery - OR Gef - SGH - Cautery - OR
Document Type SGH IntraOp Record - OR	└──(A) Cautery └──(A) SGH - Cultures and Specimens - OR └──(A) SGH - Implant/Explant Log - OR └──(A) SGH - Medications - OR └──(A) SGH - Medication └──(A) SGH - Medication └──(A) SGH - Medication
Surgeons Plisvcw, Tyler	- ♥ Exponents └─ ♥ Exponents └─ ♥ Exponents In OR/Plisvow, Tyler/Repair Hemia In
III Procedures Repair Hemia Inguinal	
< Þ	< M
	< Back OK Close
Ready.	TEST.ORMINGT PRODBC 18-Dec-2017 09:01

7. Click OK



Preference Card Advanced Copy Tool		•		
Task Help				
Copy Options				
Area to Area O Surgeon to Surgeon (Procedure to Procedure	One to Many		
What to copy:				
Pick Lists				
Overwrite with New Data				
Only Add Additional Items				
Do Not Modify, if Data Already Exists				
Segments				
✓ Defaults				
Overwrite with New Data				
Only Add Additional Defaults				
O Not Modify, if Data Already Exists				
Preference Card / Segments Comments				
Overwrite with New Data				
Do Not Modify, if Data Already Exists				
	< Back Ne	xt> Close		
Ready.	TEST.ORMNGT P	RODBC 18-Dec-2017 09:04		

- 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.