OR Manager User Guide

Picis Perioperative and Critical Care 10.0

Intended Use: Picis Clinical Solutions software patient information system compiles an electronic medical record utilizing commonly available hardware, and is classified as a “medical device” by regulatory agencies in certain jurisdictions. A patient record is populated with information from various sources, such as healthcare professionals, medical devices connected to the system, and data that arrives via hospital and laboratory information systems. The application stores this information in a database, and it may analyze and/or display the data in different formats for evaluation by healthcare professionals for informational purposes. The product is intended for use by healthcare professionals.

HIPAA and EU General Data Protection Regulation Compliance: Picis Clinical Solutions has put considerable effort into providing the capability to protect and audit access to patient personal health information in its products. It is highly recommended that those responsible for implementing the software fully utilize the delivered security functionality in order to ensure that only authorized users have access to the data; to facilitate meeting the HIPAA minimum necessary standard; and to facilitate meeting the EU General Data Protection Regulation’s "privacy by design" requirement. Picis Clinical Solutions supports configuration that will permit authorized users to restrict access to certain features and functions, to allow view-only rights to protected information and to define editing rights. Also, native audit features and reports can be utilized periodically in order to monitor changes or particular instances of access to data.

Caution: The data displayed on Picis Clinical Solutions applications are for informational purposes only. Picis Clinical Solutions recommends that users always refer to primary devices for diagnosis and treatment.

Hardware Requirements: Detailed hardware requirements are provided during the contract process. Please contact your System Administrator or Picis representative should you require additional information.

Nomenclature: The expressions "real-time data", "real-time variables", "real-time fluids" etc. are Picis expressions that refer to near real-time data collected from connected devices.

Removal of Picis software: For information on removing Picis software, please refer to the *Release Notes*.

Troubleshooting: If you encounter problems with the installation, configuration or use of the product, please contact your Picis representative or submit a support request.

Hard copy: Paper copies of certain guides are available. Please contact your Picis representative for details.

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Refer to the *Release Notes* for date of manufacture.

Document may include cautionary statements.

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CE 0123

Unique Device Identifier (UDI)	For UDI information, refer to the *Release Notes*.

Contents

Contents

Contents

Contents

1

Introduction

Welcome

Welcome to the *OR Manager User Guide* for Picis Perioperative and Critical Care 10.0.

OR Manager is used to automatically document every aspect of processing a surgical patient.

There are five major areas of functionality:

- **Scheduling/Booking**: Allows scheduling staff to identify available time slots for patients, while taking room, resources, and equipment needs into consideration. OR Manager matches your organization’s Enterprise Master Patient Index (EMPI) to positively establish patient identity.
- **Intraoperative Charting**: User-designed screens facilitate automated case documentation. Exception noting at the conclusion of the case sets up the information for automated billing and supply management.
- **Preference Cards**: Preference cards link to your Materials Management inventories to allow single-location maintenance of items. Preference cards provide output of both picklists and worksheets.
- **Case Costing**: Cost analysis tools enable you to analyze both supply and non-supply costs of completed cases by a number of criteria including surgeon, procedure, surgeon/procedure combination, and user-defined cost categories.
- **Automated Billing and Inventory**: Billing rules facilitate supply management through decrements of inventories and recording of patient billable items.

About the Documentation

OR Manager user documentation is closely associated with OR Manager configuration documentation and SmarTrack documentation. The following sections explain how the documentation sources are related and how you can get the most out of them.

- *OR Manager User Guide*: This documentation is available as a help system and a PDF manual. It shows you how to perform day-to-day functions with OR Manager such as booking cases, managing case records, and viewing reports.
- *OR Manager Configuration Guide*: This documentation is available as a PDF manual. It shows you how to set up OR Manager by populating dictionaries, defining forms and reports, and setting parameters.
- *SmarTrack User and Configuration Guide*: This documentation is available as a help system and a PDF manual. It shows you how to prepare and use SmarTrack for day-to-day functions. (SmarTrack uses data from the same sources that are set up for OR Manager.)

The guides open in Adobe Reader.

Best Practice: Configure Adobe Reader to open linked PDFs in a new window. (Consult the Adobe Reader help file for instructions.)

Nomenclature

OR Manager uses the following nomenclature:

Term	Usage
Screen	Application windows are referred to as "screens"
Routine	Step-by-step procedures are referred to as "routines"
Mnemonic	A "mnemonic" is a short name for an item (in contrast, the full name is often referred to as the "description"). ***Example:*** *Mnemonic:* ANES; *Description:* Anesthesia Plan

What's New in this Guide

New in 8.6 MR7

For VA sites, bookings now include a pre-configured page for progress notes. After the page has been completed, the user can click the **Progress Note** button to export it to VistA as a TIU note.

New in 8.6 MR5

For VA sites, case records now include a "TIU Progress Note" section with five pre-configured pages. After the pages have been completed, the user can click the **Progress Note** button to export the section to VistA as a TIU note.

Carried forward from 8.6 MR4

OR Manager now integrates with VistA at VA sites. For more information, see the VA version of this guide.

Carried forward from 8.6 MR3

Major changes and enhancements related to this guide for the 8.6 MR3 release are listed below.

- New option for filtering surgeons and anesthesiologists in booking windows when working in a multiple facility environment.
- New option to create automatic email notifications and reminders in the booking process based on primary procedure or primary surgeon.
- New Revise Patient message when a case is initiated from a booking where the patient has a Pre-Op record and does not have a unit number and user selects the ADM patient on the case. This is available as a customization when enabled.
- Permit the context setting to be disabled for schedulers who have no rights to use PreOp Manager and Anesthesia Manager. When this customization is enabled schedulers with no access to clinical modules will be able to do the following:
  - Open multiple booking sheets at one time.
  - Open case records.

Carried forward from 8.6 MR2

No OR Manager enhancements in this release.

Carried forward from 8.6 MR1

Major changes and enhancements related to this guide for the 8.6 MR1 release are listed below.

- *Optum* is now *Picis.*
- *Optum OR Manager* is now referred to as *OR Manager.*
- *Optum Patient Tracking* is now referred to as *SmarTrack.*
- *Optum OR Security Manager* is now referred to as *Security Manager.*

Carried forward from 8.6

Case Record Functionality Enhancements

The following enhancements have been made to case record functionality:

- When privileges are not assigned to Case Record functions, the icons are inactivate in the open section.
- For existing and copied cases, if an inactive drop-down record was previously selected, those display in the drop-down along with active entires.
- All the standard fields are available in the custom select fields when creating conditions for editing and for mandatory/recommended fields in the case record. Any standard field can now be applied which replaces the previous limitations of having only four fields available.
- The list of user fields for Case Records, Case Record Patient Data, Patient Data, and Booking Data user-defined fields can be filtered by Standard, TPA Shared, Content Library loaded, and client created (Custom) fields. If any of these specific field types do not exist, the selection box does not display.
- The Booking URN has been added as a standard field for Case Records and prints in the header of a printout for standard case records.
- Case Record level milestone events, for those milestone which are used in dynamic data exchange, depend on date/time fields pairing where a time field has a corresponding date field to prevent future date/time documentation.
- The top bar of Process Header in 'View Only' mode now displays *Header - VIEW ONLY* instead of *Enter/Edit Header Section - VIEW ONLY*.
- The Case Record number prints in the header of Implant Records.

- The following fields are available for the Case Record Process Header: Anesthesiologist, Equipment, Resources, and Assistants. An ellipses displays with procedures to show modified procedures (or a lack of modified procedures.)
- A new button on the Edit Case Data Tab, **Close all**, closes all sections of a Case Record with a single click. This action is captured in the Case Record Audit Trail. The information displayed includes the following:
  - Action: CLOSE ALL
  - User: user mnemonic
  - Action date
  - Action time
  - Surgeon
  - Procedure
  - Room
- Users no longer see inactive entries for new bookings and case records. The only exception is on the user-defined forms in the drop-down fields.

Note: For existing and copied bookings, if an inactive drop-down record was previously selected, those display in drop-down along with active records.

Complex Case Averages

In Case Record Fields Mapping, new mapping fields have been added for complex case average calculations. Users can assign any Case Record category time fields for new From and Thru fields.

A new toggle button in the Surgeon Stats area of the Booking tab changes all of the surgeon/procedure statistics to reflect the complex case, and the Case History button lists all of the complex cases that have been performed.

When a second procedure or surgeon is added to a booking, and this combination has been previously captured (in a different booking), the complex case average field is populated with the duration of the surgeon/procedure combination. A new toggle button in the Surgeon Stats area of the Booking tab changes all of the surgeon/procedure statistics to reflect the complex case, and the Case History button lists all of the complex cases that have been performed.

Booking Functionality Enhancements

- Inactive dictionary entries no longer appear in the drop-down fields on the Booking tab page (for example, surgeon, procedure, site, laterality, assistant 1, assistant 2, Rooms, Waitlist Priority, Equipment/TPK, Resources, Anesthesiologist, Consultant Surgeon, Consultant Anes) and the Patient tab page (for example, Patient Bed Type). Users can only select from active entries in all these drop-down menus.

Note: For existing and copied bookings, if an inactive drop-down record was previously selected, those display in drop-down along with active records.

- The **Run Date** field on the booking sheet has been expanded to **Run Date/Time** at the bottom right of each page to show when the Booking Sheet was printed on the printout.
- A new setting on the Physician Office Link tab in Security Manager determines whether or not a user is restricted to view only access for a surgeon's bookings. When the user attempts to access a Booking that has a 'View Booking Only' Surgeon, a message is displayed that informs the user that access is restricted. Users are restricted from creating a New Booking/Reservation for the surgeons that are flagged as View Only Booking. See the *OR Security User Guide* for more information.
  - The Booking surgeon drop-down list only includes those Surgeons who have not been restricted to View Only Booking.

Milestone Events

- A new prompt displays when a user tries to document a future (date/time) Milestone Event.

Manage Routines and Other Changes

- A new search field provides the ability to retrieve bookings in Manage Bookings and case records in Manage Case Records based on the patient SSN or HCN (Canadian Healthcare Number).
- When Conditions for editing have been assigned to fields, and the response that meets the condition(s) is changed to a response that does not, the user is prompted to confirm whether or not they want to clear the field value conditions. If the user clicks **Yes** to this prompt, all of the values in the fields associated with conditions for editing are removed. If the user clicks **No** to the prompt, the response value changes but the conditional field values do not; they remain as they were. See the *OR Manager Configuration Guide*.
- The "..." Modified Procedure description box in both the Bookings and the Case Record header has been relabeled "More".
- A new prompt opens when a user clicks **Process Header** and another section is open. Clicking OK allows the user to continue in view only mode.
- EMPI search functionality has been removed and is no longer seen in New Bookings, Add-on Cases (in either OR Manager or SmarTrack.)
- The Manage Bookings Selection List for Special Equipment includes TPK items. Users can select these item(s) to Include or Exclude from the search so when Bookings are retrieved, this filter is applied and the Bookings listed match the selected criteria.
- Printing from the following areas shows a line through a deleted allergy in the same way they appear in the application:
  - Case Record Printout (Standard)
  - Case Record Printout (Custom)
  - Worksheet (Custom)
  - Picklist (Custom)
  - Booking Sheets (Standard)

- Mail Merge

- A warning message notifies users that invalid ICD codes are present in a booking or case record in the following instances:
  - Save booking form data
  - Change the date in a booking or case record
  - Save data in a case record section
  - Copy an ICD booking to a date when ICDs are expired
  - Close a case record section
  - Close all case record sections

See the *OR Manager Configuration Guide* for additional information on ICD codes.

Dictionary Changes

- A new button in the Procedure Dictionary providers users the ability to search **Previous** items in the instead of only **Next** items to allow up and down searches through items.

2

Basic Concepts and Skills

This chapter covers the basics about how to log on to OR Manager and how to navigate through the system's screens.

Topics in this chapter include the following:

Logging On

Note: The OR Manager icon is generally available on the Windows Start menu: **Start > Picis Products > OR Manager**.

1. Double-click the OR Manager icon.

   The Picis log-on screen appears.
2. Enter a valid user name and password (case-sensitive) to log on and then click **OK**.

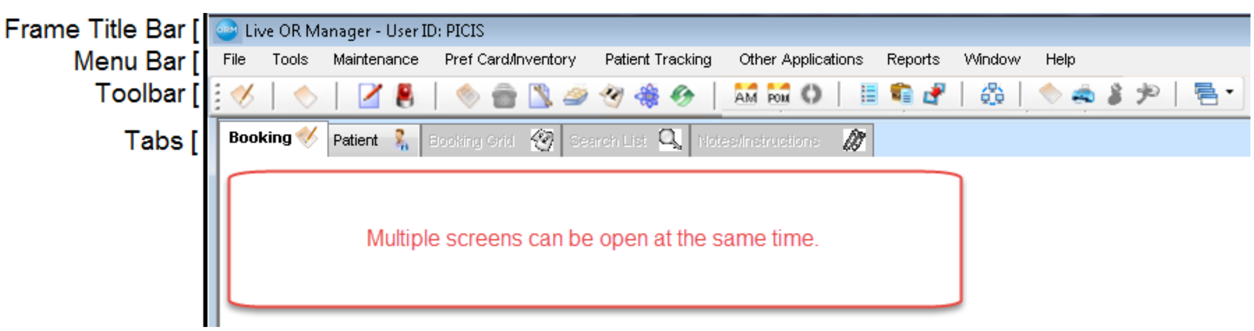
> **Note:** Whether or not the **Change Password** button is present in login windows depends on your system configuration (if Directory Services Authentication is used it will never be present). If configured by your site, there is also a control for choosing the **Domain** to log on to.

OR Manager Screen

The OR Manager screen has the following parts:

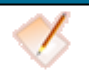
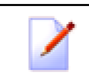
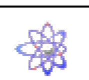
- **Title Bar**: Tells you where you are in the OR Manager system.
- **Menus**: The commands on each menu depend on the active screen and user security settings.
- **Toolbars**: Contain buttons for quick access to frequently used commands. The buttons on the toolbars change depending on the active screen and user security settings.

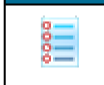
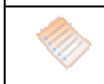
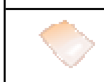
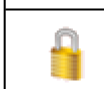
  (You can change the look and position of the main toolbar by selecting the **Toolbars** command from the **Window** menu).
- **Subsidiary screens**: You can have several screens open at once, letting you move easily throughout the different parts of OR Manager.
- **Title Bar**: The title bar of each screen gives you summary information on the screen's contents.
- **Tabs**: Tabs are used like tabs on folders in file cabinets.
- **Status Line** Displays general information that varies with each screen, such as date and time.



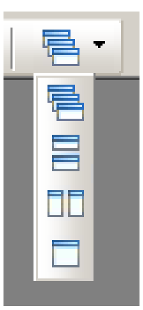
Using the Main Toolbar

The main OR Manager toolbar has buttons for the most frequently-used commands.

Icon	Description
	New Booking
	Enter/edit Case Record
	Enter Add-on Case
	Manage Bookings
	Request Inbox
	Manage Case Records
	Manage Preference Cards
	Schedule Viewer
	Rearrange a Day
	Refresh Dropdowns

Icon	Description
	Print Pick Lists
	Print Case Worksheets
	Transmit Charges/Supplies
	Tracking Screens
	OR Schedule
	Print Screen
	SQL Spy Capture
	Clear Current Booking
	Lock Case Record
	Debug Log Capture

The toolbar also includes a drop-down selector for arranging screens:



Cascade Open Sheets
Tile Horizontally
Tile Vertically
Layer Open Sheets

<u>Tracking Screens</u>

If the active screen is a tracking screen, two additional icons appear on the main toolbar:

 Refresh Tracking Screens

 Macros

"Other Applications"

If an "**Other Applications**" menu is present you may also see toolbar icons for one or more of the following Picis applications:

- Anesthesia Manager 
- Preop Manager 
- PreOptimize 

> **Note:** This command is only active if a patient-related screen is open.

For more information, see the *Security Manager User Guide*.

Quick Link

If a "**Quick Link**" menu is present you may also see a drop-down list of custom icons providing access to external applications, depending on the configuration. (The following image is an example only - the actual icons will depend on your configuration.)

For more information, see the *Security Manager User Guide*.

Customize the Toolbars

There are two ways to customize the buttons and placement of the toolbars:

- Select **Window > Toolbars** to see the Customize Toolbars screen.
- Right-click the toolbar to see a toolbar menu.

header1	header2
body1	body 2a body 2
body1	body 2b
f	df
df	df

-

For This Task	Do This

Encryption

If administrators have configured OR Manager to provide encryption services, selecting the following starts a tool provided by Picis that allows you to generate hash values and to encrypt and decrypt files that are generated by Picis applications.

Tools > Options > File Integrity/Encryption/Decryption

Encryption and decryption ensure the files' confidentiality and protect their contents. Encryption services are provided by an application with the name Picis.EncryptorDecryptor. These services are mainly intended for use with files that will be sent to an external system, but they can also be used to protect local or network-share files. For a complete explanation, see the *Technical Reference Guide*.

Working with Screens

Display Options

OR Manager offers the following options for displaying the screens:

- Tile
- Layer
- Cascade

Accelerator Keys

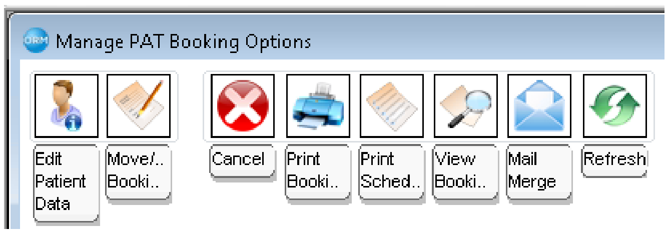
Accelerator keys are key combinations, usually CTRL or ALT plus another key, that you can use in place of the mouse. Use accelerator keys to select commands quickly, without interrupting your keystrokes to reach for the mouse.

OR Manager Ctrl Key Combinations

CTRL +	Description
B	Enter a new booking.
R	Enter a new case record.
S	Save changes to the active screen.
F4	Close the active screen. (Except the main OR Manager screen; for that use ALT + F4.)
TAB	Move between OR Manager screens.

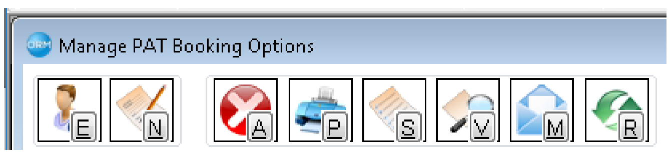
<table>
<tr><th>CTRL +</th><th>Description</th></tr>
<tr><td>F1</td><td>Show textual descriptions for large buttons in the screens that have them (such as the Manage PAT Booking Options screen shown in the example).

The descriptions are hidden when Ctrl +F1 is pressed again or when the picture buttons or screen is clicked. For descriptions that are truncated, you can click the description to expand it.


</td></tr>
</table>

ALT Key Combinations

<table>
<tr><th>ALT +</th><th>Description</th></tr>
<tr><td>Nothing</td><td>Show underlined hotkeys for large buttons in the screens that have them (such as the Manage PAT Booking Options screen shown in the example)..


</td></tr>
<tr><td>Underlined "hotkey" letter</td><td>Many commands on the screen have one letter underlined. Press ALT + the underlined letter to select the command. For Example, ALT + G is the same as clicking the Go button.

Note: Depending on the screen and the field in focus, you may need to click the "ALT + key" combination twice to execute it.</td></tr>
<tr><td>F4</td><td>Close the active screen. (Including the main OR Manager screen if all other screens are closed.)</td></tr>
<tr><td>↓</td><td>Shows the list of choices when the cursor is in a dictionary lookup box.</td></tr>
</table>

Entering Dates (Today + or - Method)

When entering dates into OR Manager fields, users often need to enter the current day's date or a relative date, such as "one week ago".

Rather than entering such dates manually, you can enter the letter **T**,for **T**oday, and the current date automatically enters. Or, you can enter **T± x**, where x is a number of days.

> ***Example:***
>
> **T**: Today
> **T-7**: The date seven days ago.
> **T+365**: The date a year from now.

Entering Times

There are two ways to enter Time fields:

- You can enter the time in 24-hour notation. You do not have to enter a leading zero (0) for times before noon.

  > ***Example:*** Enter *945* and the system displays *0945*; for *1:35 PM*, enter *1345*.

- You can use *n* notation. *n* stands for now, the current time. If you enter N you get the current time. You can also enter *n+* or *n-* and the number of minutes after or before the current time to get a time relative to the current time.

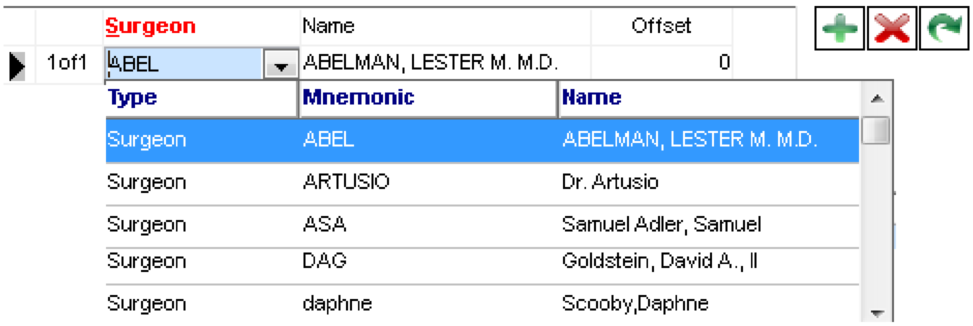
  > ***Example:*** If the current time is *1253* and you enter *n+10*, the system will display *1303*.

Drop-down Menus

OR Manager table and dictionary fields (other than free text fields) have drop-down menus listing the field's possible entries.

> **Note:** Users do not see inactive entries for new bookings and case records in drop-down fields. The only exception is with the user-defined forms drop-down fields.

This drop-down menu example is from the **Surgeon** field on the OR Booking screen. All surgeons listed in the Surgeon dictionary appear on the list unless surgeon filtering for a multi-facility environment is enabled.



Note: A mnemonic with a line through it indicates the entry is currently inactive. Inactive entries are not available for use.

Star Search

A "star search" helps narrow your field entry search by finding a sequence of letters within the name or description column in drop-down lists (not the "mnemonic field).

Example: If you are searching for a surgeon whose name contains the letters “smith”, it takes a long time to use the drop-down menu to scroll through the surgeons until you find the right one. By doing a star search, you can narrow you search to those whose names contain the sequence “smith”, such as Smith, Goldsmith, Arrowsmith, and Smithson.

1. Type an asterisk * (star) in the field.
2. Next to the star, enter a letter (or string of letters) to narrow your search. The more letters you enter, the fewer number of results are returned.

Note: Star searches are not case sensitive

Multi-string Star Search

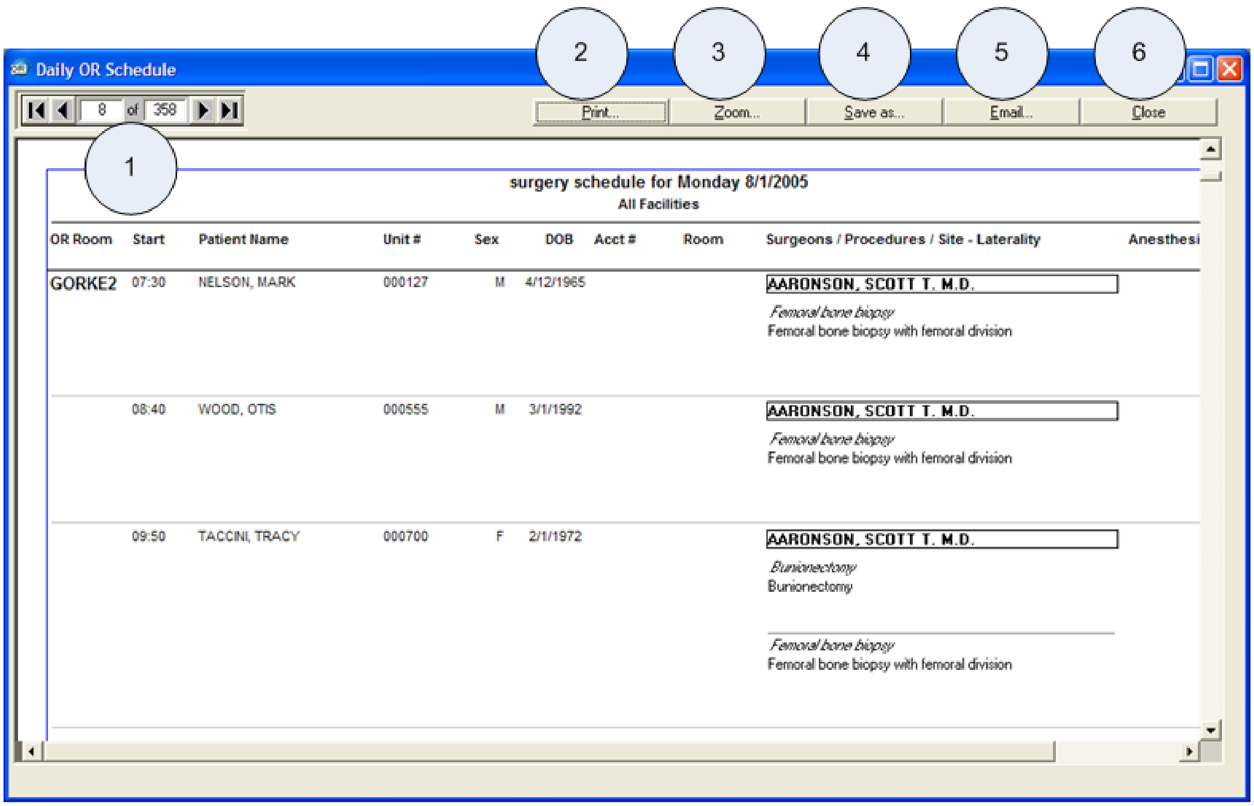
You can use the star search feature to search two strings of letters at the same time.

Example: To find the dictionary entry for the procedure “excision ganglion”, enter “*excis, gan.” The system finds all entries that contain both strings of characters.

Note: The order of the strings does not matter. However, only one comma is allowed, separating two separate strings; *xxx, xxx, xxx results in no matches found.

Report Screen

OR Manager uses the Reports screen in many parts of the application. The following is a quick reference:



1. **Arrow Buttons**: Use these buttons to go back to the beginning, to the previous page, to the next page, or to the last page, respectively.
2. **Print**: Use **Print** to print the information shown on the screen to the printer.
3. **Zoom**: Use **Zoom** to adjust the amount of information shown on the screen, and the size of the font it is shown in.
4. **Save as**. Use **Save As** to save the information on this report for a later date. You can choose any one of a number of formats to save the report in.
5. **E-mail**. Use **Email** to send this screen to another user.
6. **Close**. Use **Close** to exit this screen.

3

Booking

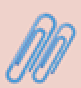
Overview

The following chapters discuss how to perform booking tasks.

- See *OR Booking Screen Overview* on page 36 to learn how to book an operation. This presents all of the possible variations on booking operations, such as multiple procedures, multiple surgeons, entering a patient, and the six different ways to search for an operating room.
- See *Pre-Admit Tests* on page 85 to learn how to book pre-admission tests.
- See *Managing Bookings and Booking Tools* on page 91 for a discussion of the tools you have available to manage your bookings, including searching for groups of bookings meeting certain criteria, creating case records from bookings, printing picklists, editing and canceling bookings, viewing and rearranging schedules, and a host of other possibilities.
- See *Custom Field Select* on page 209 for information on how to use the Custom Field Select option to extend the built-in search capabilities of both the bookings and case records manage screens.

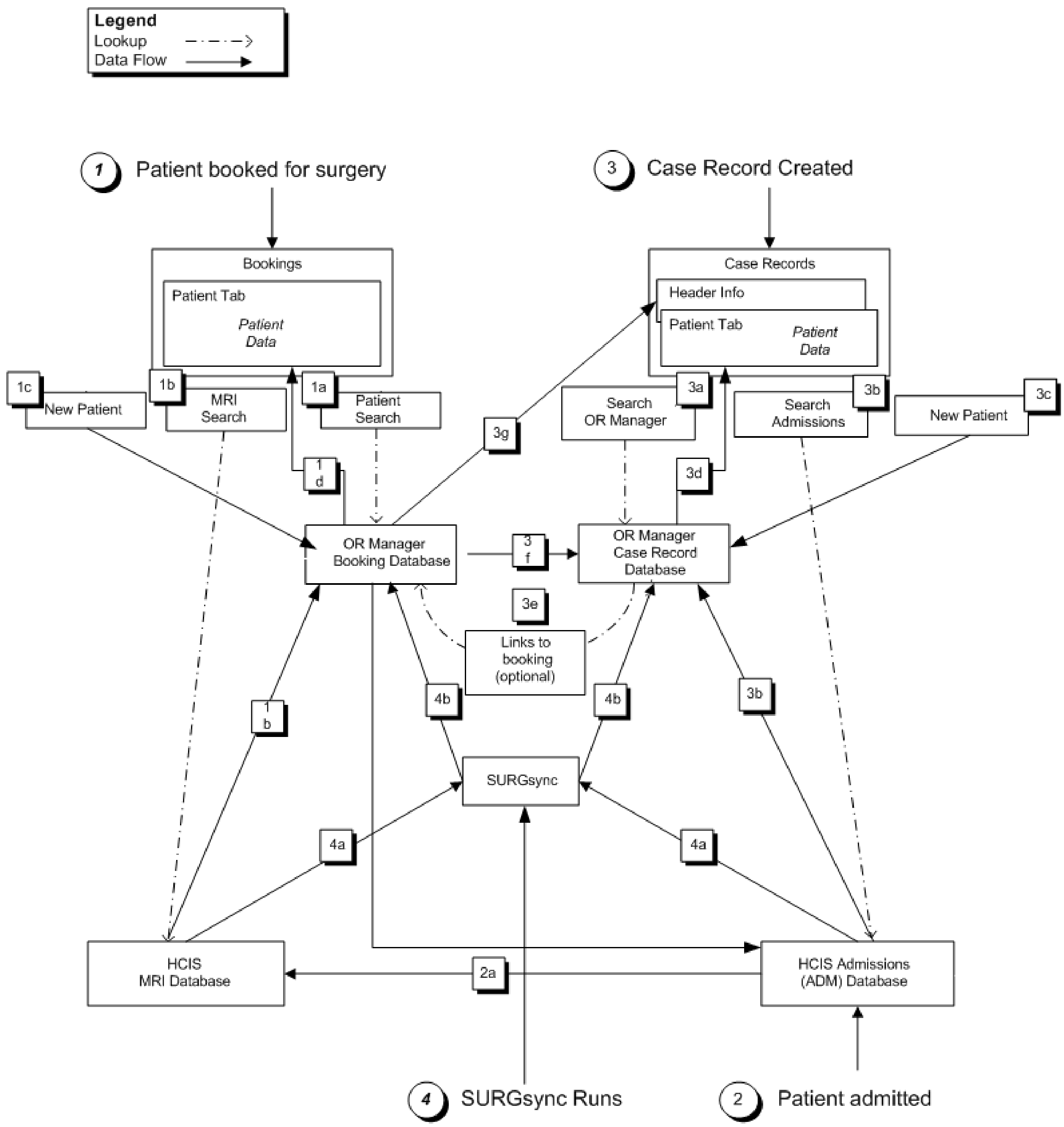
> **Note:** An appendix in the *OR Manager Configuration Guide* provides information about the transition between different versions of ICD codes. It describes the behavior that determines the code version or versions visible as you work with bookings.

Booking Tabs

Icon	Tool Tip Name
	Booking Tab
	Patient Tab
	Booking Grid Tab
	Search List Tab
	Notes/Instructions Tab

Booking and Case Record Internals

The following diagram explains what happens in OR Manager and associated systems when you book a surgery.


Legend
Lookup
Data Flow
1 Patient booked for surgery
3 Case Record Created
Bookings
Patient Tab
Patient Data
Case Records
Header Info
Patient Tab
Patient Data
1c
New Patient
1b
MRI Search
1a
Patient Search
3g
Search OR Manager
3a
Search Admissions
3b
New Patient
3c
1 d
3d
OR Manager Booking Database
3 f
OR Manager Case Record Database
3e
Links to booking (optional)
1 b
4b
4b
3b
SURGsync
4a
4a
HCIS MRI Database
2a
HCIS Admissions (ADM) Database
4 SURGsync Runs
2 Patient admitted

1. *Patient booked for surgery.* When you enter a patient's name, you can search for the patient or enter a new patient.
   - **Patient Search**: If the patient had a previous surgery at your facility, he/she already exists in the booking database.
   - **MRI Search**: If the patient has a previous admitted to your facility, he/she is in your HCIS MRI Database and their data is copied to the booking database.
   - **New Patient**: If the patient has never been admitted or had surgery at your facility, click **New Patient** to create a new patient record in the booking database.
   - Data from the booking displays on the **Patient** tab.
2. *Patient admitted.* The patient is admitted for surgery through your HCIS Admissions module.
   - The patient data is copied to your HCIS Medical Records Database.
3. *Case record created.* A case record is created to document the surgery.
   - **Search OR Manager**: The case record database is searched for an existing record matching the patient data.
   - **Search Admissions**: The Admissions Database is searched for a patient admitted for surgery. If they are found in the Admission database, the OR Manager case record database is updated with the data.
   - **New Patient**: The patient data is entered into the OR Manager case record database.
   - Data from the case record displays on the **Patient** tab.

   Additional options are available for individual users.
   - The case record database can be linked to the booking database to search for a match on patient data.
   - If matching data is found in the ORM database, it is copied into the case record database.
   - Case Record Header info updated from booking database.
4. *Surgsync runs.* Surgsync synchronizes your ORM database with your HCIS database.
   - Takes information from Admissions and Medical Records.
   - Updates booking database and case record database.

Allergies, Reactions, and Precautions in Booking Patient Forms

The allergies, reactions, and precautions entered within the case patient forms update the booking patient data for all bookings. When a patient booking or case is saved (add-on case or not), OR Manager merges the allergy, precautions, and surgical history data for the patient.

- Allergies and reactions entered via the HIS/CIS are shown in bold.
- If an allergy is deleted from a patient's HIS/CIS record it will be shown in strikethrough font with the bold formatting removed in OR Manager. Deleted HIS/CIS allergies are also placed after other allergies.
- Allergies are shown as underlined when they are coded medication interaction checking in Anesthesia Manager.

Formatting of Allergies

Example	Source of Data	Description of Text Format
Penicillin	Picis form	normal font
Penicillin	hospital information system	bold
~~Penicillin~~	HIS deleted allergy	normal font with a strikethrough These allergies sort to the bottom of the list.
Penicillin Penicillin	HIS (coded for MIC) Picis (coded for MIC)	Underlined text, regardless of source, indicates medication allergies that are coded for interaction checking in Anesthesia Manager.

Note: Patient allergies and reactions should be reviewed and removed from OR Manager if necessary.

Medical Record and Account Number Updates

As transactions are filed in the interface database (IDB), Surgsync checks each transaction and determines if it is a Medical Record Number or an Account number that has been filed in the ORM database (either a booking or a case record has been linked to that number).

⚠ **CAUTION:** Picis applications do not support the use of recycled account numbers. If account numbers are recycled patient information is lost and overwritten by another patient's data.

- All updates to demographic data (Medical Record) are filed as patient data. These are referenced by all bookings for a patient.
- Updates are filed for a particular account number. Information is updated differently within the case record depending upon where the information resides within the case record. There are five main types of case data:
  - Case Record Header (account/patient information).
  - User Defined Case Record Patient Data forms.
  - User Defined Case Record (Data) forms.

- Integrated data (fields) between OR Manager and Anesthesia Manager, Preop Manager, and so forth.
- Exception Noting (supplies)

Type of Data	Example	Update Method
Case Record Header Data	Patient name; account number status	Continuously updated when updates to account number are received by Picis. Case status (complete, in-process) does not apply.
User Defined Patient Data	Address, insurance, other linked fields either user created or delivered as a standard field within OR manager	Continuously updated when updates to account number are received by Picis. Case status (complete, in-process) does not apply.
User Defined Case Record Data	Address, insurance, other linked fields either user created or delivered as a standard field within OR Manager (It is not common to place patient linked fields in case record data screens)	Continuously updated until the case is placed into a completed status. All updates stop after a case is placed into a completed status - even if the case is subsequently put back into an in-process status.
Integrated Data Fields	Allergies, anesthesia type, anesthesia staff	Typically are updated regardless of case status (completed or in-process). See the *Guide to Dynamic Data Exchange* for further explanation regarding integration.
Supply Data	Stocks or TPKs originating from a booking, a preference card, or added manually to a case record.	Stocks are only updated manually by users within case records. One exception is that supplies are updated on the case record when the optional Picis supply cabinet interface is purchased and configured to update the case supplies.

4

OR Booking Screen

Chapter Contents

This chapter covers the following:

- *Physician Office Link*
- *Booking Roadmap*
- *OR Booking Screen Overview*
- *Booking Tab: Introduction*
- *Booking Tab: Surgeon and Procedure*
- *Booking Tab: Multiple Surgeons/Multiple Procedures*
- *Booking Tab: Surgeon/Procedure Stats*
- *Booking Tab: Equip/TPK, Resources, and Anesthesiologists*
- *Booking Tab: Facility Information*
- *Booking Tab: Scheduling Options*
- *Refreshing Drop-down Lists*
- *(Booking) Patient Tab: Overview*
- *Patient Tab: Patient Search Options*
- *Patient Tab: Patient Search Details*

- *Patient Tab: Forms*
- *Booking Grid Tab*
- *Search List Tab*
- *Booking Notes/Patient Instructions*

Physician Office Link

OR Manager may be installed in offices outside of a hospital to enable doctors to schedule surgeries.

Using Physician Office Link requires high-speed access to OR Manager, which can be achieved in the following ways:

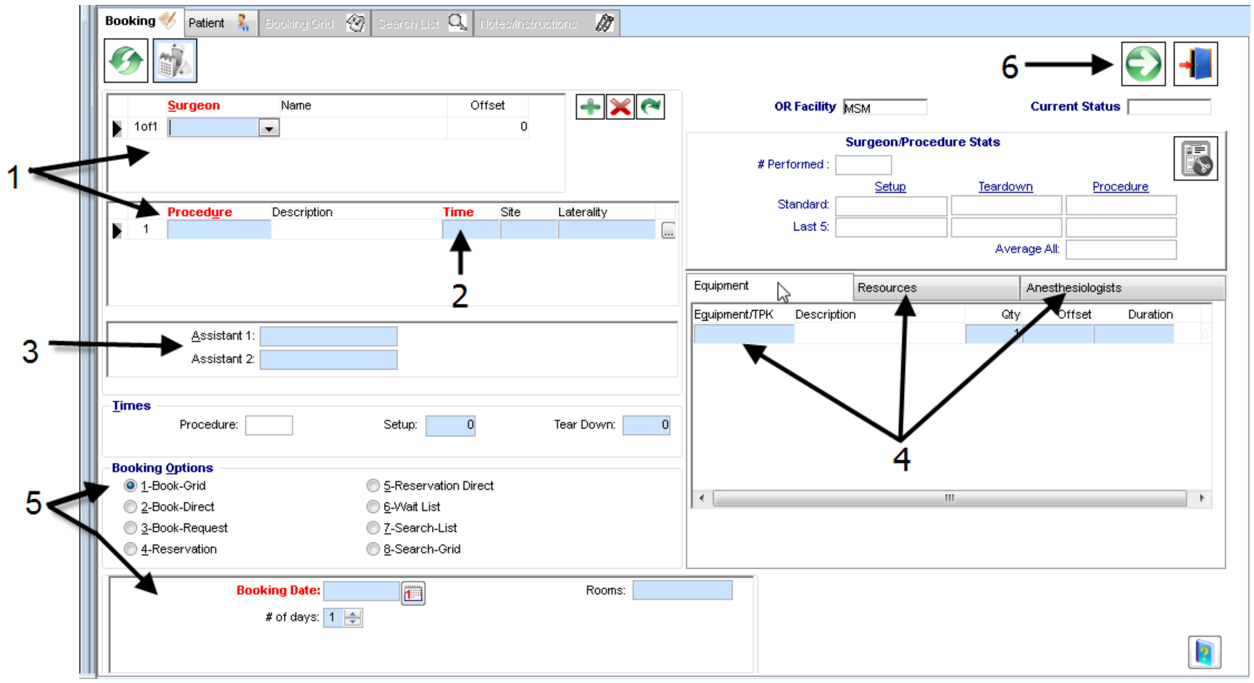
- Remote office has direct access to the network.
- Remote office has access to the network through a Virtual Private Network.
- Remote office can use OR Manager via a Citrix connection, which requires a dedicated server.

After connectivity is established, Security Manager restricts access to OR Manager screens exactly the same way workstations and users are restricted in the hospital. However, the **Physician Office Link** tab in Security Manager further restricts access.

See the *Security Manager User Guide*.

Quick Start: Book a Case in 30 Seconds

1. Select a **Surgeon** and a **Procedure**.
2. If necessary, change the **Time** (procedure's duration) in minutes.
3. Select **Assistants** (if needed).
4. Select any additional **Equipment and Tray/Pack/Kits, Resources,** and **Anesthetists** needed for the procedure.
5. Select a booking method and specify which **Dates** and **Rooms** to search. Select a patient from the **Patient** tab if one has not yet been selected.
6. Click the **Go** button to open the **Patient** tab and begin booking. Many fields shown in the following graphic populate automatically after you select a surgeon and procedure.



Booking Roadmap

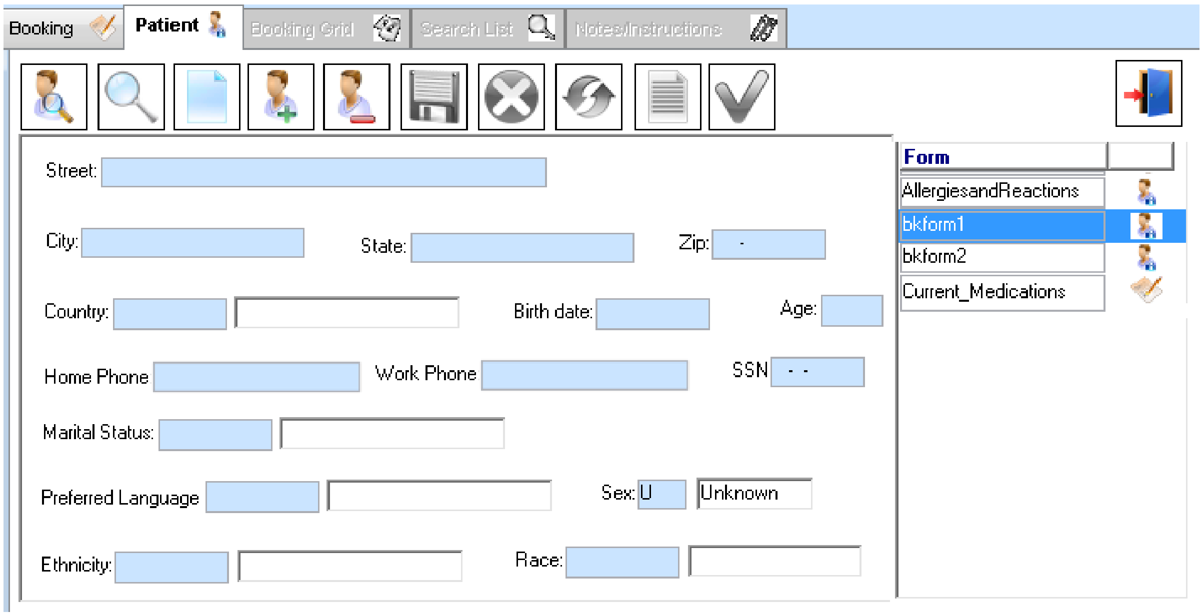
This section provides an overview, or *roadmap*, of the sequence of activities performed to schedule surgery. Because there are many possible variations, the table presents only the most general description of what happens at each stage. See also

See Booking Screen Flow Diagram on page 37 for a diagram of this process.

1. Select **File > New Booking**.

   The Select OR Facility screen opens in front of the OR Booking screen.
2. Select an OR facility, then click **Select**.

   The Select OR Facility screen closes, exposing the OR Booking screen.
3. Enter the information on the **Booking** tab of the OR Booking screen. See *Booking Tab: Introduction on page 40* and *Booking Tab: Facility Information on page 53*. The preference card that matches the surgeon and procedure is automatically associated with the booking without the need of creating a link.
4. Open the **Patient** tab and enter the information.



5. Click **GO**.

   Depending on the booking method selected on the Booking tab, a booking grid or a search list is displayed to select a room and time. After conflict checking is completed, the operation is booked for the room and at the time you specified, booked as a request, or added to the Wait List.

6. Click **Save**.

   The patient is scheduled for surgery.

OR Booking Screen Overview

The following functions are available from the OR Booking screen.

- Book a surgeon and a room for a procedure.
- Book equipment, tray/pack/kits, resources, and anesthesiologists.
- See a surgeon’s average time for a procedure.
- See messages notifying you about scheduling conflicts.
- Access patient data, including demographic, insurance, and clinical information.

Note: If any Surgeons on a booking are set to **View Only** on the Physician Office Link tab in Security Manager, the booking will be view only and no edits allowed.

Pre-Admit Test Button

Pre-Admit Test is used to schedule surgery patients for pre-admission testing.

See *Pre-Admit Tests* on page 85.

OR Booking Screen Tabs

The OR Booking screen has the following five tabs. Some of the tabs are available only with particular booking options.

- **Booking**: This is the launching point for booking a surgery. It is where the booking method, surgeons, procedures, assistants, equipment, tray/pack/kits, etc. that are necessary for the procedure are selected.
- **Patient**: User-defined screens where the patient is identified, and patient and surgery-specific information for the facility is entered.
- **Booking Grid**: The booking grid shows the rooms and times available for the surgery.
- **Search List**: This tab presents a list of rooms that meet your criteria for times, dates, etc.
- **Notes/Instructions**: This tab opens a word processing document for viewing and printing booking notes and patient instructions, both of which flow from the Booking Notes dictionary. See *Booking Notes/Patient Instructions* on page 82

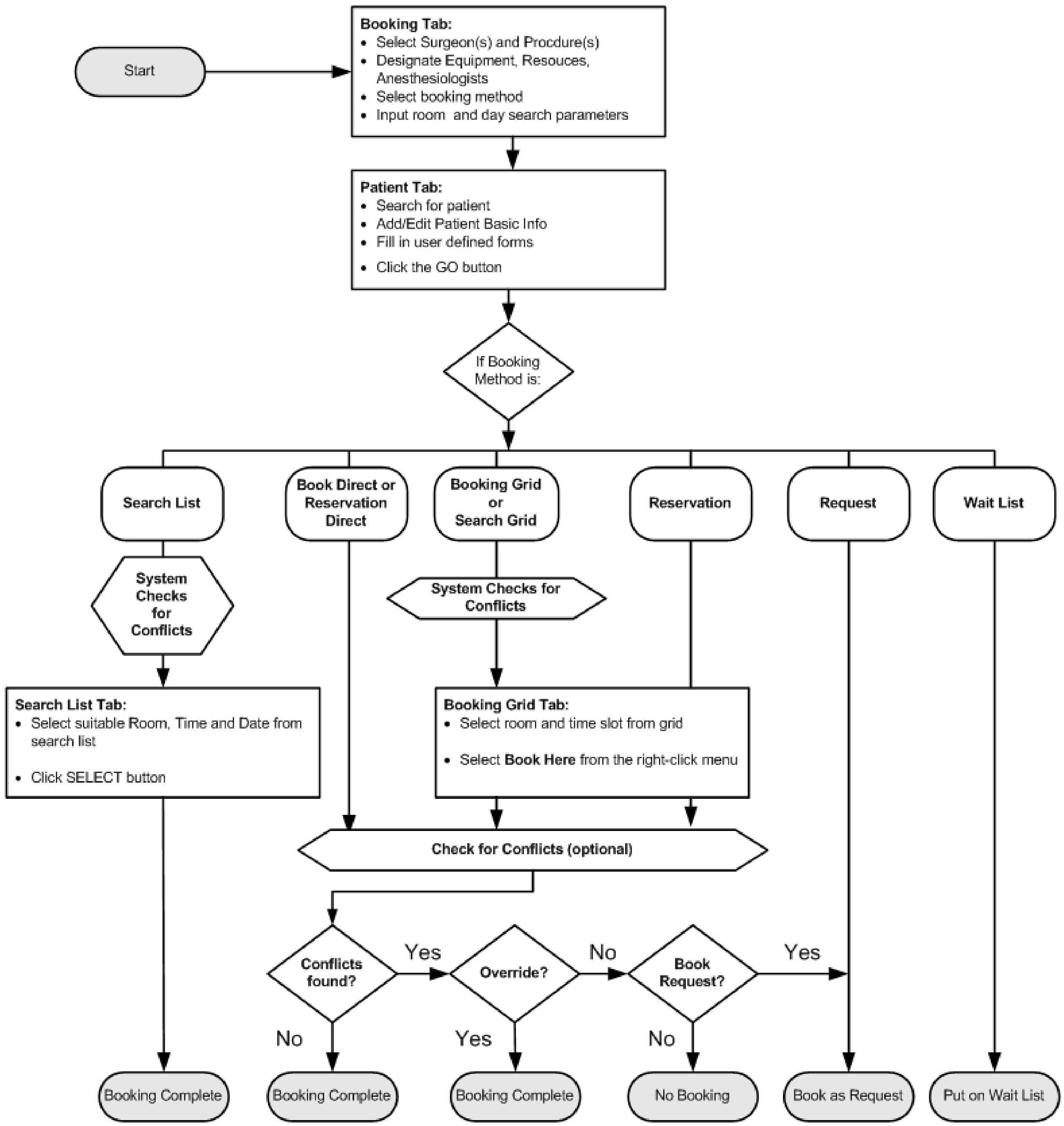
See the *Booking Dictionaries* and the *Booking Notes Dictionary* sections in the *OR Manager Configuration Guide*.

Booking Screen Flow Diagram

The following diagram illustrates the typical work flow from tab to tab as you book a patient for a surgery.

Note: This is a basic diagram designed to show how the tabs are used and in what order. It does not include the many variations, nor does it include the **Notes/Instructions** tab because it is not directly involved in the booking process.

See *Booking Roadmap* on page 35 for a step-by-step description of patient booking.


Start
Booking Tab:
Select Surgeon(s) and Procdure(s)
Designate Equipment, Resouces, Anesthesiologists
Select booking method
Input room and day search parameters
Patient Tab:
Search for patient
Add/Edit Patient Basic Info
Fill in user defined forms
Click the GO button
If Booking Method is:
Search List
Book Direct or Reservation Direct
Booking Grid or Search Grid
Reservation
Request
Wait List
System Checks for Conflicts
System Checks for Conflicts
Search List Tab:
Select suitable Room, Time and Date from search list
Click SELECT button
Booking Grid Tab:
Select room and time slot from grid
Select Book Here from the right-click menu
Check for Conflicts (optional)
Conflicts found?
Yes
Override?
No
Book Request?
Yes
No
Yes
No
Booking Complete
Booking Complete
Booking Complete
No Booking
Book as Request
Put on Wait List

Booking Options Menu

The Booking Options menu provides a way of accessing many of the OR Booking screen features from one menu. Many of the selections on this menu are duplicated elsewhere, while some selections are unique to this menu.

Menu Item	Descriptions and References
Select Facility	Enables you to change the facility into which you are booking the procedure.
Change Patient	Enables you to change the patient for whom you are booking the procedure. *Patient Tab: Patient Search Options* on page 64.
Edit Basic Patient Info	Brings up the **Patient** tab in Basic Patient Information mode. *Basic Patient Information Mode* on page 59.
Show Form	Brings up the **Patient** tab in Form mode. *Forms Mode* on page 60.
View Booking Notes	Opens the **Notes/Instructions** tab to the Notes screen.
View Patient Instructions	Opens the **Notes/Instructions** tab to the Instructions screen.
Clear Current Booking	Clear all fields in the booking so that you can start over.
Pre-Admit Test Booking	Opens the Pre-Admit Test screen. *PAT Screen* on page 87.
View Case History	Opens the Case History screen from the Surgeon/Procedure Stats. *Fields and Buttons* on page 51.
Similar Booking Parameter	Opens the Similar Booking Parameters screen. *Similar Booking Parameters Screen* on page 71.

Menu Item	Descriptions and References
Save User Defined Data	Save data from the Forms mode of the **Patient** tab. *Patient Tab: Forms* on page 67.
	This button moves you on in the booking process. Depending on the booking method and the current screen, it will either change the tab, change the screen or proceed to finalize the required action (e.g. booking). The button becomes available after sufficient data has been entered to identify the patient and book the operation. *Booking Method Radio Buttons* on page 55.

Booking Tab: Introduction

You can use the **Booking** tab to schedule the necessary room, surgeon, procedure, resources, equipment, and tray/pack/kits. You are automatically and immediately notified about any conflicts with scheduling or authorization, allowing you to make adjustments and re-book the operation.

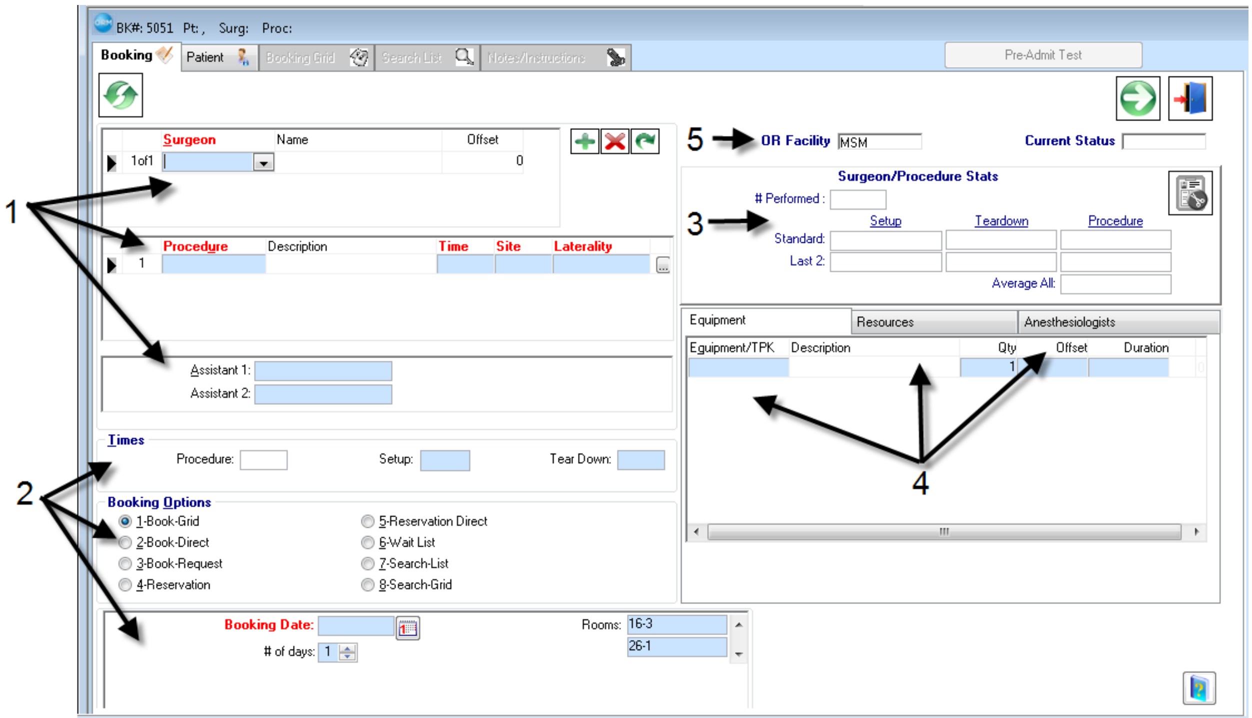
Regions

The **Booking** tab has five regions:

1. *Surgeon and Procedure*. This is where you select the surgeons, procedures, and assistants.
2. *Scheduling Options*. This is where you set the duration of the surgery, including all procedures with set-up and tear-down times, booking method, dates and times, and rooms. Most of this information defaults in automatically.
3. *Surgeon and Procedure Stats*. Provides the option of calculating averages for Complex or Simple cases, and provides an estimate of the total time the surgery should take based on the history of the selected surgeons/procedures combination(s).
4. *Equip/TPK, Resources, and Anesthesiologists*. Lists the default equipment, tray/pack/kits, resources, and anesthesiologists for the operation.
5. *Facility Information*. Shows which facility you are booking the surgery for and its current status.

The tab also has buttons for **Refresh**, **Go**, and **Close** .

Note: Inactive entries in the dictionaries do not appear in the drop-down fields of these booking regions.



Important Booking Tab Functions

See the following sections to understand important **Booking** tab Functions:

- *Enter an Alternate Procedure Description* on page 47
- *Add Additional Surgeons* on page 48
- *Edit Multiple Surgeons* on page 48
- *Add Additional Procedures* on page 49
- *Reorder Surgeons and Procedures* on page 49
- *Delete a Surgeon* on page 49

Booking Tab: Surgeon and Procedure

The Surgeon and Procedure region is where you select the surgeons and the procedures for an operation.

Note: If the user's Physician Office Link Surgeons are all set to **View Only** in Security Manager, a message displays indicating that the user is unable to enter a new booking.

Fields

These are the fields in this region:

- **Surgeon**: Select the surgeon's mnemonic.

  Note: If an inactive surgeon exists in the drop-down on a previously saved booking and the user adds a new surgeon row, the user will be able to use the inactive surgeon on the new row if the on 'select_inactives' flag is active. (This is true for all drop-down lists.)

- **Offset**: The number of minutes into the operation that the surgeon starts. (For multiple surgeon operations see *Booking Tab: Multiple Surgeons/Multiple Procedures* on page 48.)
- **Procedure**: Select the mnemonic for the Procedure. OR Manager checks to see if the surgeon is authorized to perform this procedure.
  - In **Procedure** in the booking screen, you can search for procedures in several ways, in addition to using the mnemonic, by entering a special character before your search text. Entering the greater than character (**>**) in the Procedure field in the booking screen opens a sub-screen in which you can search for procedures. Procedures appear in columns holding entries that correspond to the meanings of special characters that head the columns. See *Procedure Search Options* on the facing page.
  - Clicking on the ellipsis at the end of the Procedure row displays the Modify Procedure Description screen. The screen shows the currently attached ICD procedure codes. See *Alternate Procedure Description* on page 46.
  - See *Authorization Overrides* on page 45
- **Time**: Shows the average time, in minutes, it takes the surgeon to perform this procedure. If the surgeon has not performed enough operations to provide a reliable average, the default average from the Procedure dictionary appears.

  Note: A booking's schedule cannot cross midnight.

Note: This note concerns Case Average Times calculated from case data. You can always enter actual case times, for example, Patient in room, in one-minute increments regardless of the booking time increment setting. However, the case average times as they default into new bookings are divisible by the booking time increment.

Example: For example, surgeon SMITH has a calculated average LAPCHOLE procedure time of 44 minutes from case data from multiple cases. If the booking time increment were set at 10 minutes the default scheduling (procedure) time would be 50 minutes when a LAPCHOLE is next scheduled for SMITH. If the booking time increment were set at 5 minutes the default scheduling time would be 45. Both of these examples assume that rounding up is the behavior specified by the administrator.

- **Site**: Select the mnemonic for the area of the patient's body being treated (i.e. leg, abdomen, etc.).
- **Position**: Select the position of the patient for this operation, such as left, right, upper, etc.
- **Assistant**: Select up to two assistants per surgeon.

  Note: If two surgeons are working on the same procedure, set one of the surgeons as an assistant; do not add an additional surgeon.

Note: If you are editing an existing booking with a frozen picklist, you can change or add surgeons or procedures without altering the supplies. (If a booking's facility is changed in addition to surgeon or procedure changes, the option to keep supplies is not available.)

Buttons

Add, **Move**, and **Delete** are for scheduling operations in which two or more surgeons participate in sequence. See *Booking Tab: Multiple Surgeons/Multiple Procedures* on page 48.

Procedure Search Options

You can search for procedures from the Procedure field in the booking screen in several ways, in addition to using the mnemonic, by entering a special character before your search text. Entering the greater than character (**>**) in the Procedure field in the booking screen opens a sub-screen in which you can search for procedures. Procedures appear in columns holding entries that correspond to the meanings of special characters that head the columns.

Note: The ICD codes are not procedure codes. ICD codes are diagnoses codes.

Search Type	Character	After the Character
Procedure Description	*	a description
Snomed Code	=	a Snomed code
ICD9 Code	?	an ICD9 code
ICD10	>	ICD10
Procedure Long Description	&	a long description

Search Type	Character	After the Character
CPT Code	:	a CPT code *Potential Problems with CPT Codes for Scheduling* below.

These special characters are displayed in the headers for the corresponding columns of the drop-down list for easy reference. (Use the horizontal scroll bar to see the columns to the right of the viewing area.)

If more than one procedure matches your criteria, a list of procedures displays. Click on a column header to re-sort the list by that column.

Potential Problems with CPT Codes for Scheduling

There are many obstacles in utilizing CPT codes to build a procedure file and for use in scheduling. First and foremost is that CPT codes are designed to be very specific, while this level of specificity is not always present when scheduling occurs. The following are examples:

- *Reconstructions*: If a surgeon schedules a hand or facial reconstruction, often the exact procedures to be performed are not known, and these will not be known until after the surgery has been performed.
- *Exploratory Lap*: Similar to the preceding, it may be unclear as to what procedures will be performed, if any.
- *Procedures requiring pathology reports* (for example, excision cyst): CPT codes often need a designation of benign or malignancy of tumor or lesions size to assign the correct code. Assume that a report came back benign. Everyone has heard of tumors that were identified as malignant on frozen section, but the final pathology report came back benign. No one wants a malignant diagnosis attached to a medical record inaccurately.
- *Any excision, mass or tumor removal*: The size of the lesion determines the CPT code. The size cannot be accurately determined at the time of scheduling. Therefore it is not possible to assign the correct CPT code at the time of scheduling.
- *Multiple-Procedure Cases*: Many common multiple procedure cases are actually scheduled as one procedure. An example is TA (Tonsillectomy and Adenoidectomy). This is done to save the scheduler time when booking. Other complicated examples include Spinal Fusions. Almost all clients have one procedure to represent a Spinal Fusion, and they indicate in notes more specifically what will be done. Schedulers find this much quicker than booking six, eight, or ten individual procedures.
- Surgeons often don’t schedule by CPT, or at least not with enough information to select the appropriate CPT code. The CABG procedures are examples. Although surgeons may know how many grafts or jumps they are going to do, they often don’t know what they will use for the jump until they get inside and see what the veins look like. What they will schedule is a CABG or a

CABG with three to four jumps. Attempting to schedule more specifically may amount to a guess rather than a reasonable expectation.

Authorization Overrides

The OR Manager security system warns you if you attempt to book an unauthorized surgeon for a procedure. You may override this warning and book the surgeon for the procedure if you have the proper security rights. See the *Security Manager User Guide*.

Important Note About Authorization Overrides

Standard OR Manager functionality is to display all procedures regardless of individual surgeon authorizations. With proper security rights, you may choose to override lack of authorization and book procedures for which surgeons are not authorized.

There is, however, a system option to display only the procedures for which surgeons are authorized. See the *Security Manager Users Guide*.

Booking Surgeon Filter By Facility

The *restrict_surgeon_lookup_by_facility* application parameter allows for filtering of surgeons and anesthesiologists by facility in the booking window when working in a multi-facility environment. When the system flag is enabled the surgeon and anesthesiologist drop-down lists in the booking process will display only the surgeons and anesthesiologists authorized for the current facility. Filtering in the Booking Tab includes the following physician types:

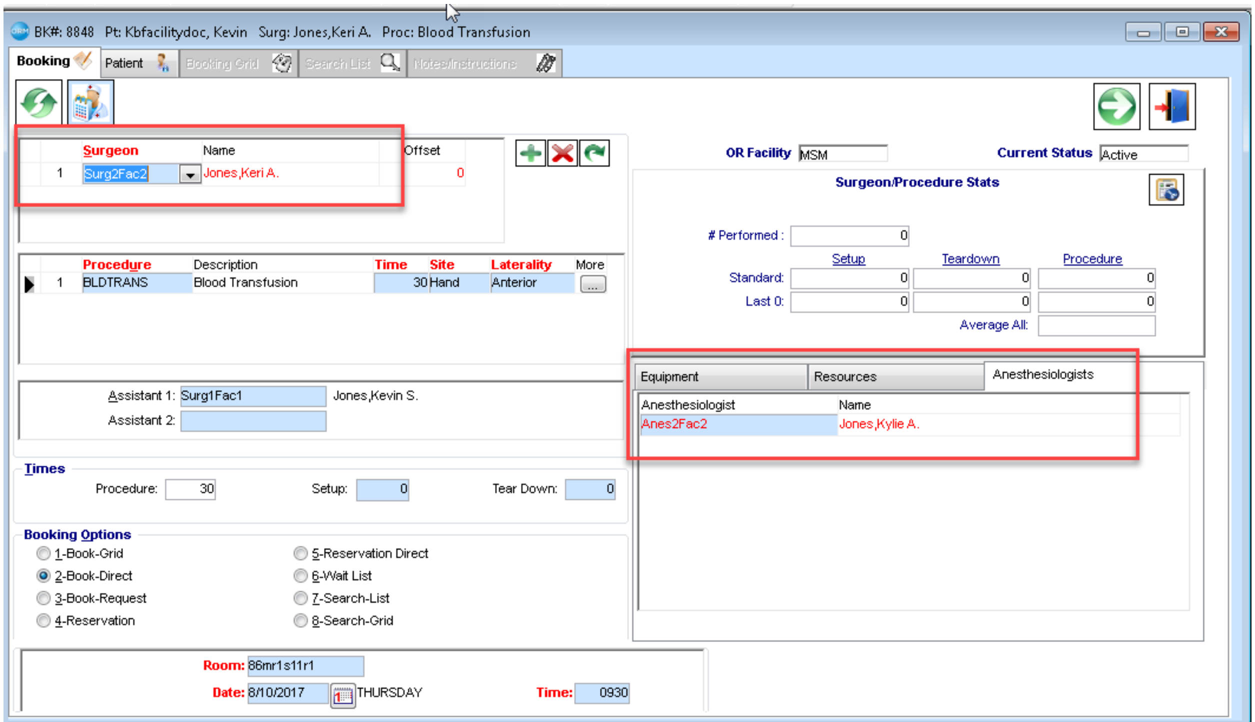
- Booking surgeon
- Assistant surgeon
- Anesthesiologist

Note: The facility that a surgeon has access to is determined by the user settings for that surgeon. If the surgeon is a member of a group then the individual user facility settings are ignored and the group facility setting takes precedence. See the *Security Manager Users Guide*.

In addition to filtering the drop-down list options, the *restrict_surgeon_lookup_by_facility* flag will cause the system to validate the surgeon and anesthesiologist that have been assigned to a booking when editing booking information in the Booking Tab. If the a surgeon or anesthesiologist's access rights to the facility have changed the user will be alerted with a message.

The user is also alerted when the booking surgeon or anesthesiologist has a facility access violoation when the facility is changed using **Booking Options > Select Facility**. This occurs when *restrict_surgeon_lookup_by_facility* flag is enabled.

When a booking is displayed that contains a surgeon with an access violation the surgeon name is highlighted in red. The assistant surgeon and anesthesiologist would also display in red to indicate an access violation should it exist.



Note: The surgeon and anesthesiologist with facility settings that no longer match those of the booking facility can be updated or the original surgeon or anesthesiologist values can be retained. The dropdown lists for surgeon and anesthesiologist will display the ones with facility access violoations highlighted in red at the top of the dropdown list.

Alternate Procedure Description

You can modify the name of the procedures in the current operation in both the OR Booking screen and the Case Record screen to accommodate differences in the names doctors and staff use to refer to various procedures. This alternate procedure name is the name that appears on picklists and booking sheets that are accessed through Manage Bookings for this operation.

The Procedure dictionary’s short description for an angioplasty is “Angioplasty, Balloon” and the long description is “Percutaneous transluminal coronary angioplasty”. However, if the surgeon prefers to call it a “Heart Artery Dilatation,” you can change the description of the procedure for this one instance to match the surgeon’s preference. The surgeon’s terminology is then associated with the Angioplasty, Balloon procedure throughout the system for as long as the record of the operation stays in the system.

Enter an Alternate Procedure Description

The Modify Procedure Description screen discussed in this section displays all of the currently attached CPT Codes and ICD procedure codes.

1. Click the ellipsis (**...**) on the right-hand end of the of the row that holds the procedure mnemonic.

   The Modify Procedure Description screen opens with a description of the procedure defaulted in. (The default description is determined by a parameter setting as described in the next section.)
2. Enter the alternate procedure description.
3. Click **OK**.

   Your alternate procedure description is saved.

   The Description box displays in bold typeface to indicate that an alternate procedure description has been entered.

Procedure Name Options

There are several parameter settings that affect how this feature is implemented on your system:

- You can have the Modify Procedure Description box open every time a procedure is changed, and there is not already a modified description, by setting the **proc_descr_edit_boxauto** parameter to Y.
- The default entry in the Modify Procedure Description box is either the short description or the long description from the Procedure dictionary, depending on the setting in system parameter **proc_descr_edit_default**,
- View Booking displays the modified description regardless of the parameter settings.

  You can choose to display the standard or modified description on the following reports by setting **proc_descr_display**:
  - Picklists.
  - Worksheets.
  - Bookings printed from Manage Booking Options.
  - Cases printed from Manage Case Record/Enter Edit Case Record screen.

Note: This does not change the procedure description on the **Booking** tab. Instead, the description displays in bold type if there is an alternate procedure description.

Booking Tab: Multiple Surgeons/Multiple Procedures

You can schedule multiple surgeons to enter the room at different times to perform parts of the operation. Use **Add**, **Move**, and **Delete** in the Surgeon and Procedure Region to add, re-order, or delete surgeons from the operation.

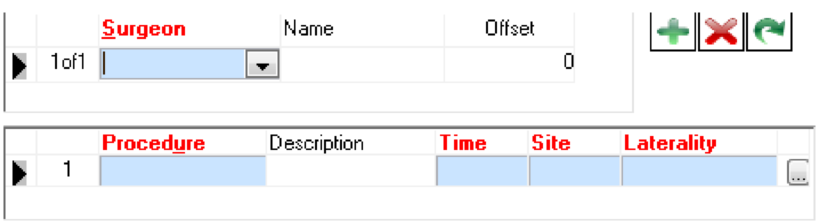
Add Additional Surgeons

Note: This functionality is intended for adding a surgeon working on an additional procedure. If two surgeons are working on the same procedure you should instead set one of the surgeons as an assistant.

1. Click **Add**.

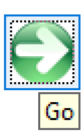
   The Surgeon, Procedure, and related fields clear to enable you to enter another surgeon.

   Note: Red text indicates a field is required.



   Note: The number of minutes in **Offset** default to the total length of all procedures already selected, excluding the setup and tear-down times.

2. Select the **Surgeon**, **Procedure** and related information in the same way it was done for the first surgeon, then perform one of the following actions:
   - Enter the other parts of the **Booking** tab as necessary, then click the **Go** button.



   - Click **Add** to add another surgeon to the operation.

Edit Multiple Surgeons

1. Use the scroll bar to select the surgeon whose procedures you want to edit.
2. Edit the booking as you would any other booking.

Note: If you change the procedure time for a booking, do not forget to adjust the offset times of the surgeons scheduled to come after it.

Add Additional Procedures

1. With the cursor in **Laterality** for the first procedure, press the TAB key.

   Another row of boxes appears in the procedure section.
2. Fill in the new procedure just as you did the first.
3. Repeat these steps for each procedure you want to add for the surgeon.

Reorder Surgeons and Procedures

1. Click **Move** on the **Booking** tab.

   The Reorder Surgeons and Procedures screen appears.
2. Highlight a surgeon or procedure and keep the mouse button pressed as you drag the surgeon or procedure to another place in the order.

   Note: You can only drag surgeons and/or procedures down the list, not up. To move a surgeon or procedure up the list, you must drag the entries above it down to a position below it on the list.
3. Click **Ok**.

   The new order is saved.

   Note: You can change the order of the procedures for a surgeon, but you cannot move a procedure to a different surgeon or a surgeon to a different procedure.

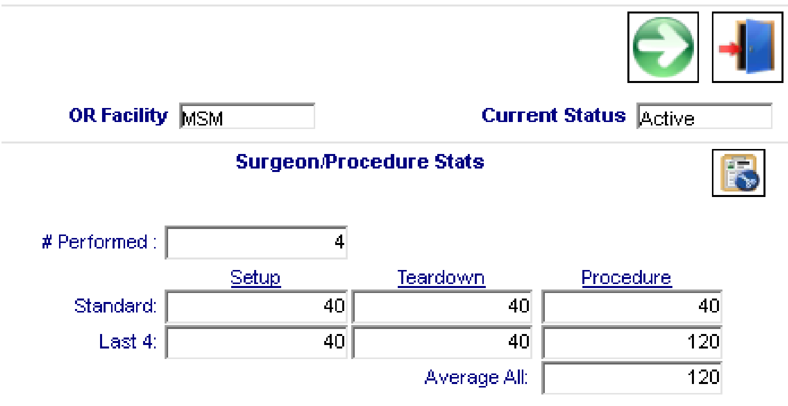
Delete a Surgeon

1. Use the scroll bar to select the surgeon whose booking you want to delete.
2. Click **Delete**.
3. Click **Yes** to delete the surgeon and his/her associated procedures.

   The surgeon is removed from the procedure.
4. Edit and/or delete any equipment, tray/pack/kits, or resources that may have been added in association with the surgeon you deleted, regardless of whether they were added manually or automatically.

Booking Tab: Surgeon/Procedure Stats

The Surgeon/Procedure Stats region shows stats to help you predict how long it will take to complete the procedure.



Overview

When your OR Manager system is first activated, all times in the "Times" section of the booking (procedure durations as well as setup and tear-down times) come from the default times built in the OR Manager Procedure dictionary.

For each surgeon/procedure combination, after a pre-configured number of cases have been performed and actual case records are created, you can calculate surgeon-specific average times and have these times default into new bookings.

The result is that if, over time, a surgeon performs certain procedures faster or slower than the default, the default **Surgeon/Procedure Stats** is replaced by the surgeon's actual average time.

Complex Cases

As with the simple cases, for each combination of multiple surgeons and procedures, after a pre-configured number of identical cases have been performed the system can calculate surgeon-specific average times which can default into new bookings.

If statistics *are not* available for a complex case combination, the average times for each procedure/surgeon individually are returned and these average times are combined in the "Times" section of the booking.

If statistics *are* available for a complex case combination, two buttons appear in the Surgeon/Procedure Stats section:

Note: There are several options for calculating **Surgeon Procedure Stats**. See the *Security Manager User Guide*.

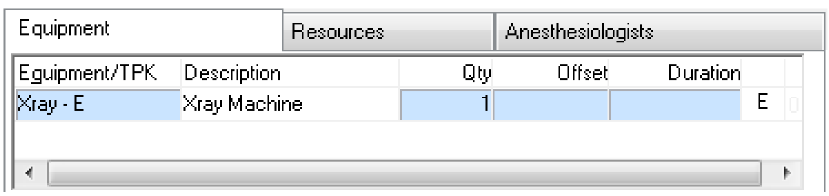
Fields and Buttons

Field/Button	Description
Complex Avg.	(Button only available for complex cases for which statistics are available) Displays statistics for the whole complex surgeon/procedure combination
Simple Avg.	(Button only available for complex cases for which statistics are available) Displays statistics specific to the selected surgeon and procedure.
# Performed:	Shows the total number of times the surgeon/procedure combination has been performed.
Standard	(Only shown for simple cases or when **Simple Avg** is selected for a complex case) Shows the standard Setup, Teardown and Procedure times, as declared in the Procedure dictionary.
Last X (X is s number configured by your hospital)	Shows average Setup, Teardown and Procedure times for the last X documented cases for the surgeon/procedure. **Note:** Deleted cases, complex cases (more than one procedure), and incomplete cases are not included in these averages.
Case History 	Shows data from each previous case used to generate the statistics for the surgeon/procedure combination. The data includes the date, patient, start and finish times, and total minutes. With the proper security access, you can designate some cases as *Outliers*, which are cases that are not counted in computing **Surgeon/Procedure Stats**. Outliers are typically procedures that have exceptional circumstances and should not be counted in the averages. **Manually designate a previous case as an outlier** ◆ In the **Outlier** column, change the **N** to **Y** in the case's row then click **OK**. The case is permanently removed from the list and its underlying times are removed from the averages calculated.

Field/Button	Description
Use Complex Avg. Time	(Button only available when Complex Avg. is selected) With complex cases, if the you edit the times for a procedure, the values shown in the Times section are updated based on the edits and using simple addition of the individual times. (As if statistics for the complex case combination were not available.) You can revert back to the complex average statistics by clicking this button.

Booking Tab: Equip/TPK, Resources, and Anesthesiologists

Select the **Equip/TPK**, **Resources**, and **Anesthesiologists** needed during the operation.



Equipment, **tray/pack/kit**s, and **Resources** default in from the Procedure dictionary. They can be edited for this particular procedure without affecting the defaults in the Procedure dictionary.

- To view Equipment and Tray/pack/kits, Resources, or Anesthesiologist entries, click on the corresponding tab.
- To insert, add, or delete entries, click on the corresponding tab, then right-click anywhere under **Equip/TPK**, **Resources**, and **Anesthesiologists** to open the menu and select them. See the *Preference Card Supporting Dictionaries* section in the *OR Manager Configuration Guide* .
- (Optional) Enter **Offset** and **Duration** values to set the number of minutes into the surgery that the equipment is needed (Offset) and the length of time it is needed (Duration).
- To cut, copy, or paste an existing entry, click on the corresponding tab, then right-click in the field you want to modify and make the appropriate selection.
- To edit an existing entry, click on the corresponding tab, then click in the field you want to edit and make a new selection from the drop-down list, or enter a different value.
- To reset the equipment and resource fields to their original default values, click **Refresh**.

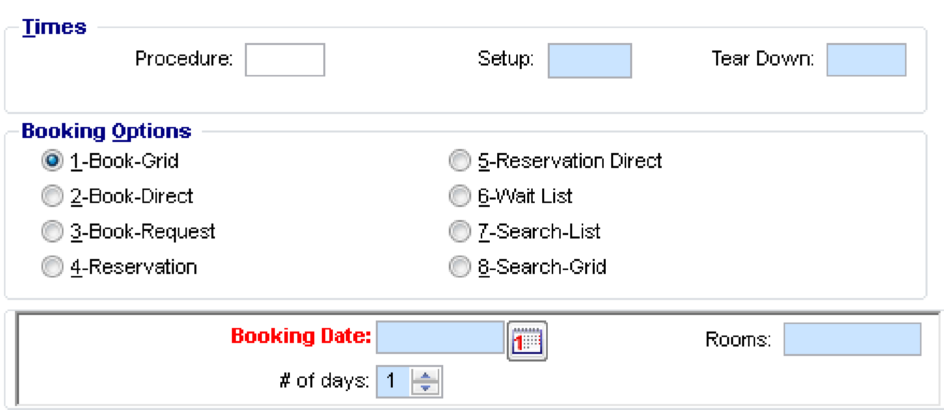
Booking Tab: Facility Information

Use the Facility Information fields to confirm the facility before creating the booking. This information is useful when multiple facilities share the same OR Manager database to avoid booking the patient into the wrong facility.

- **OR Facility**: Shows the facility you are booking into.
- **Current Status**: Active, Canceled, etc.
- **Refresh**: Click to recalculate the Case Statistics after removing outliers in Surgeon/Procedure Stats.
- **Go** button: Click to book the surgery.

Booking Tab: Scheduling Options

After entering the required surgeon and procedure information, use the Scheduling Options region to select a booking method.



Fields

- **Times** fields: Show the breakdown, in minutes, of the procedure's estimated duration.
- **Procedure**: Shows the estimated duration of the actual procedure. This comes from the Surgeon and Procedure region and shows the total times for all procedures in the surgery.

  Note: You cannot change the time here. Instead, you must change it in the **Time** field in the Surgeon and Procedure region at an individual procedure level.

- **Setup and Tear Down**: Shows the standard setup and tear down times for the surgery. The numbers here are the longest setup and tear down times of any of the procedures in the surgery. In other words, if you are doing three procedures with setup times of 10, 20, and 30 minutes, the default setup time is 30 minutes. These can be edited to adjust the total time the room is needed.

  Best Practice: New users may wonder whether the setup time or procedure start should be entered in the first "open" cell in the grid. For example, consider a room that opens at 7 AM and a first case of the day for that room that has a 10 minute setup time. Should the booking be placed in the 6:50 AM cell on the grid or the 7 AM cell? Picis recommends that if the room opens at 7 AM, then the first procedure should be scheduled to start at 7 AM, which makes the setup fall at 6:50 AM. This enters the correct setup time of 6:50 AM and procedure start time of 7 AM in the schedule reports for surgeons. If a surgeon block is involved, and setup and tear down times are included, it is best to add the setup to the tear down to make sure it is included.

- **Other fields**: The fields that display at the bottom of the Scheduling Option are determined by an administrative parameter setting explained in the *OR Manager Configuration Guide* and by the booking method you choose. If the parameter to activate the Surgical Patient Registry is on, you see all of the three following fields, regardless of which of the booking options, such as Book-Grid and Book-Direct, is selected. If the parameter to activate the Surgical Patient Registry is off, you see the Waitlist Priority field only if you select the Wait List booking option. All of the HL7 error messages sent from the Waitlist Registry are displayed.
  - **WaitList Priority**: This is an automatically generated value coming from the third-party Surgical Patient Registry through an interface that indicates the urgency of the case relative to other cases. If the Surgical Patient Registry can determine a value quickly enough, the priority appears before the case is saved. If the Surgical Patient Registry cannot assign a value immediately, an error message opens, and the Surgical Patient Registry continues working to determine a value even if OR Manager is not running. Whether this field is editable depends on whether the Surgical Patient Registry has sent a value for it. After the value that was sent appears in the field, it is no longer editable.
  - **Assessment Score**: This score is automatically populated. If the Surgical Patient Registry can determine a value quickly enough, the score appears before saving. If the Surgical Patient Registry cannot assign a value immediately, an error message opens, and the Surgical Patient Registry continues working to determine a value even if OR Manager is not running. Whether this field is editable depends on whether the Surgical Patient Registry has

already sent a value for it. After the value that was sent appears in the field, it is no longer editable.

- **Surgeon's Priority**: The priority assigned to the case at the time of the booking. This value in this field is always editable.

Booking Method Radio Buttons

The radio buttons represent each of the six booking methods. Select one of the methods and enter the date, rooms, and the number of days (from the start date) to search as appropriate. The parameter *booking_date_limit* limits the number of days in advance that a procedure can be booked. If the Surgical Patient Registry is implemented, you are not required to select a date and time.

The following topics explain each booking method in the Scheduling Options region of your OR Booking screen.

Book Grid Booking Method

Schedule a procedure using the Booking Grid.

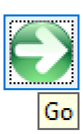
1. Enter the following information to narrow your search:
   - Earliest date to show on the Booking Grid.
   - Number of days to search.
   - The rooms you want to search.
2. Click the **Go** button to open the Booking Grid. See *Booking Grid Tab* on page 73.

Best Practice: The Book Grid Booking Method is the one that Picis recommends for normal booking purposes.

Book Direct Booking Method

These steps allow you to schedule a procedure without going to the grid.

1. Enter the room and time you want to book.
2. Click the **Go** button.



   - If no conflicts are found, the operation is booked.

- If conflicts are found, OR Manager lists them and gives you the opportunity to override them, if you are authorized to do so.

Book Request Booking Method

Request a booking is used when a scheduler is not authorized to override a conflict. Requests do not have a room, are not checked for conflicts, and do not appear on the booking grid. Requests must be converted to active bookings in order to be used to create case records or to appear on the booking grid. Use **Tools > Manage Bookings** or **Tools > Manage Requests** to manage requests, or to convert them to active bookings.

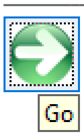
1. Enter the date and time you want to book a request.
2. Click the **Go** button.

A confirmation message states the booking is saved as a requestSee *Request Inbox* on page 135.

Reservation Booking Method

Reserve a room and time. Unlike requests, reservations have a room and time and appear on the booking grid. Reservations are not checked for conflicts and must be converted to active bookings in order to be used to create case records. Use **Tools > Manage Bookings** or **Tools > Manage Requests** to manage requests, or to convert them to active bookings.

1. Enter the following information to narrow your search:
   - Earliest date to show on the Booking Grid.
   - Number of days to search.
   - The rooms you want to search.
2. Click the **Go** button to access the Booking Grid. See *Booking Grid Tab* on page 73 and *Request Inbox* on page 135.



Reservation Direct Booking Method

These steps allow you to make a reservation without going through the booking grid. (See *Reservation* above.)

1. Enter the room and time you want to reserve.
2. Click the **Go** button.

- If no conflicts are found, the reservation is booked.
- If conflicts are found, OR Manager lists them and gives you the opportunity to override them if you are authorized to do so.

Wait List

Follow these steps to add a booking to the wait list.

1. Select a Wait List Priority.
2. Click the **Go** button to add the booking to the Wait List with the requested priority.

Search List

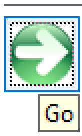
Search from a list of available rooms and times using the steps below.

1. Select date range, time range, rooms, and days of the week.
2. Click the **Go** button to access the **Search List** tab. See *Search Options* on the next page and *Search List Tab* on page 81.

Search Grid

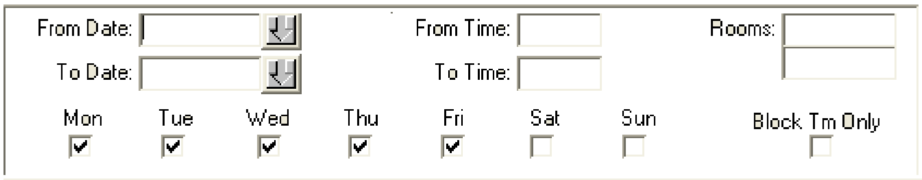
These steps allow you to schedule a procedure from the Booking Grid. This is similar to Book Grid, but allows more specifications.

1. Select a date range, time range, rooms and days of the week.
2. Click the **Go** button to access the Booking Grid. See *Search Options* on the next page and *Booking Grid Tab* on page 73.



Search Options

Select **Search-List** or **Search-Grid** from the Scheduling Options Region to open the Search Options screen.



- Enter the Date and Time ranges and select the days of the week and Rooms to search.
- For Block Time only, select to search only the open block times.

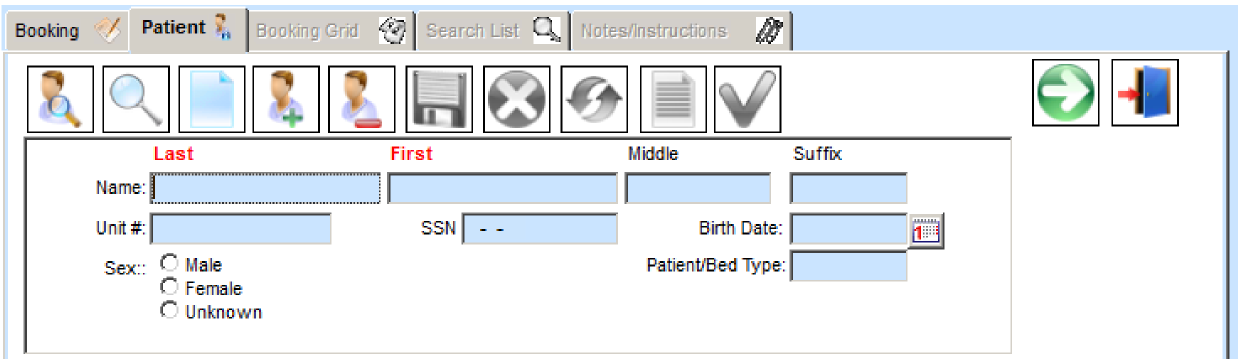
See the *Booking Dictionary Schedules* section in the *OR Manager Configuration Guide*.

(Booking) Patient Tab: Overview

The **Patient** tab has two modes: **Basic Patient Information** and **Forms**.

- **Basic Patient Information** mode is displayed when you initiate a booking. It provides demographics fields for you to search for a patient in the OR Manager booking system or HIS system. You can also use this mode to create a new patient in the OR Manager booking system. After you select a patient for the booking, you can no longer edit the basic patient information (but you can still access it in a view-only mode). (The exception is the Patient/Bed type, which you can still edit after you have selected the patient.)
- **Forms** mode is displayed automatically after selecting the patient for the booking. Patient forms are listed on the right and the first is selected and displayed by default. They are used to collect information about the patient and the details of this particular booking. (Forms are configurable; they differ from one hospital to the next.)

Basic Patient Information Mode

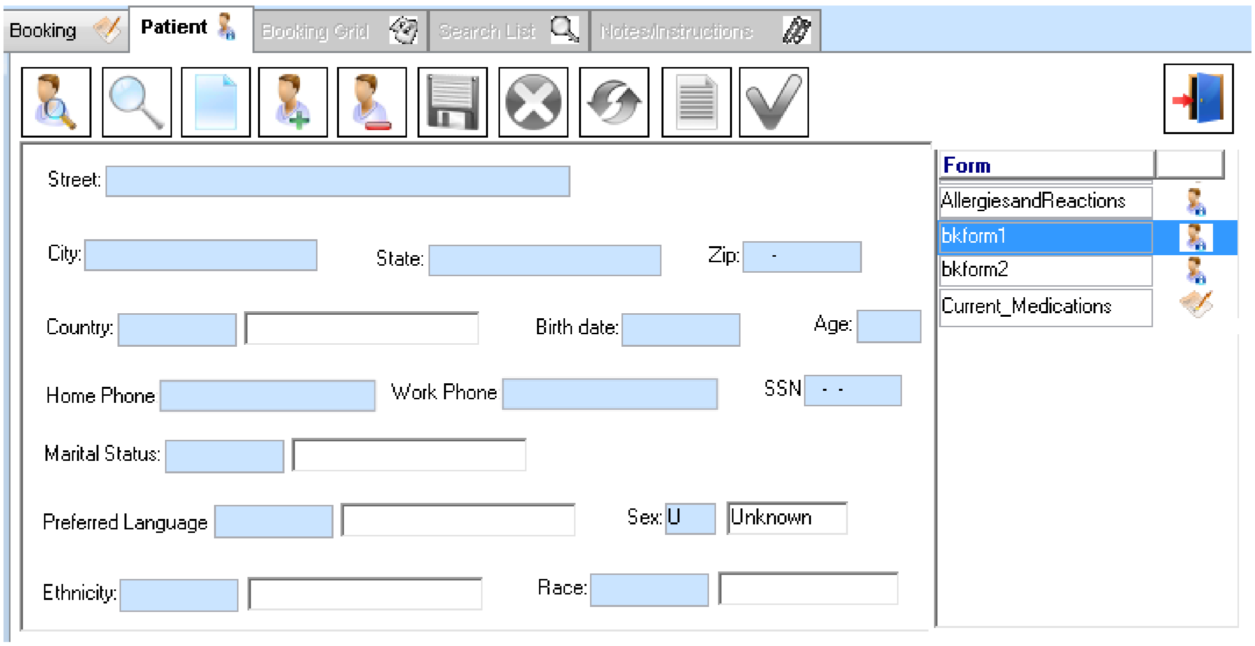


About the Suffix

Suffixes can be used for any purpose you like, but generally fall into two types:

- Degrees or family designations, such as Ph.D, MA, Jr., or III.
- Nicknames or the name the patient normally goes by, such as Jack, Kate, or Scooter.

Forms Mode



Forms mode opens automatically after selecting the patient and filling in the basic patient for a new booking. It can also be accessed when the Patient tab is in Basic Patient Information mode.

Forms are configured by your hospital and may be related to the patient ( ) or to the particular booking ( ).

Open the Forms

- Click the **Show Form** button, , on the **Patient** tab.

  Or, click **Booking Options > Show Form**.

Forms are the Patient and Booking user-defined screens:

For information on editing and creating forms for your site, search for "User Defined Screens" in the *OR Manager Configuration Guide*.

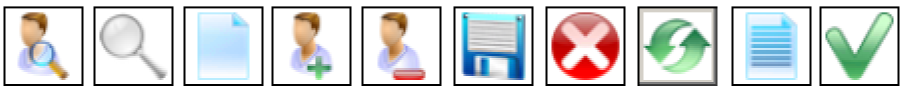
Note: An ellipsis (...) at the end of a field indicates that the text is too long to be shown on the form. You can click the field to see the full text. Note also that any screen printouts of the form will only show the truncated text, just like the form.

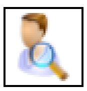
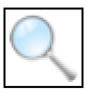
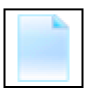
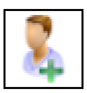
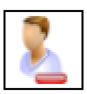
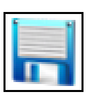
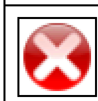
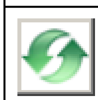
Patient Tab Toolbar Buttons

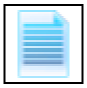
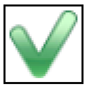
Note: Buttons are disabled and inactive if you do not have the appropriate access to use them.

The available buttons depend on the mode.

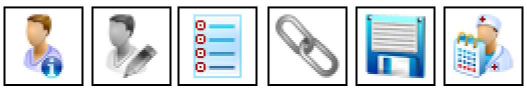
Patient Basic Information Mode

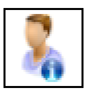
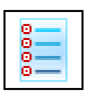
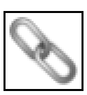
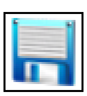


	Search the OR Manager database.
	Search the HIS
	Clear the search fields
	Create a new patient in the OR Manager booking system
	Selects the last patient whose forms were opened
	Saves changes to Patient basic information. (Available when viewing the tab after the patient has been selected.)
	Cancel (while creating a new patient)
	Clear the results (without clearing the search fields)

	Switch to Forms mode
	Save the currently selected patient to the booking.

Forms mode



	Switch to Basic Patient Information mode
	Change the Patient on the booking
	Edit PickList (available after the booking has been scheduled)
	Link Account Number
	Saves changes
	Schedule a PAT test

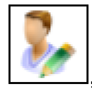
Change patient is described next.

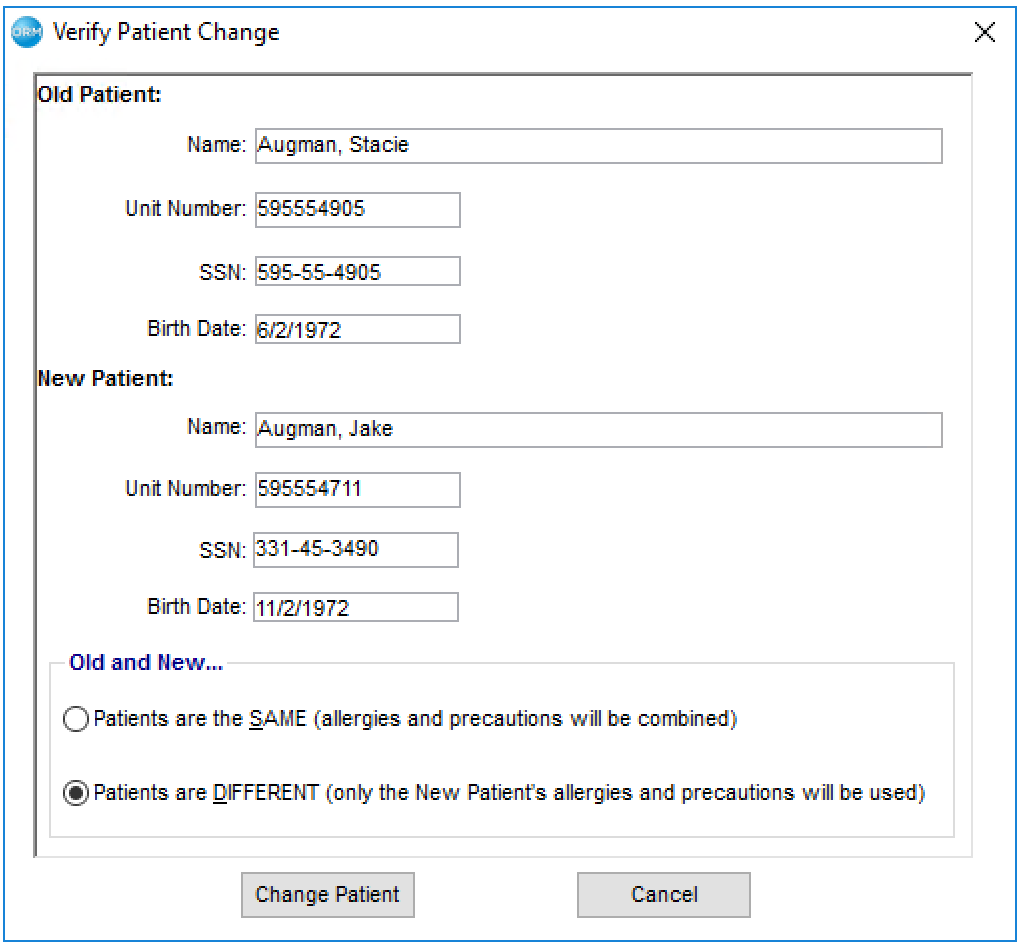
Other buttons are described later in this chapter.

Changing the Patient in a Booking

In the following procedure, the initial patient on the booking is referred to as the *old* patient; the replacement patient is referred to as the *new* patient.

Change the Patient in a Booking

1. Open the booking for the old patient.
2. On the Patient tab, click the **Change Patient** button, , or click **Booking Options > Change Patient**.
3. Search for and select the new patient using standard search methods.
   The Verify Patient Change screen appears, showing both old and new patient data for verification:



4. Select one of the two options in the lower part of the screen. The text in the screen describes the consequences of each option:
   - **Patients are the SAME:** Old and new patient allergies and precautions are combined. .
   - **Patients are DIFFERENT:** Only the new patient’s allergies and precautions are used.
5. Click **Change Patient**.

Patient Tab: Patient Search Options

Search Options

Picis recommends that you search for a patient using different methods in the order shown below until you find a match:

1. Search the OR Manager database. Patients in the OR Manager database have previously had surgery at your facility.

   If the patient is not found, OR Manager asks if you want to do an MRI search.
2. Search the HIS for patients who have been previously admitted to your facility but have not had surgery there in the Picis system.

   If the patient is not found, OR Manager asks if you want to do a Soundex search.
3. The Soundex Search option is offered when OR Manager cannot find a match on the character string you entered for the HIS search. The Soundex Search looks for character combinations that may not exactly match what you put in the **Name** box but are close.

   Example: Keying in “bawl” could bring up patients Brawely, Ball, and Bailey.

Note: Only if you cannot find a match with the previous methods, should you create a new patient record (which gets added to the OR Manager booking system).

Search Option Notes

- The information you must key in to perform a patient search is controlled by a setting in Security Manager. Requirements can be one of the following:
  - Exact name plus: SSN, date of birth, or unit #.
  - Partial name plus: SSN, date of birth, or unit #.
  - No restrictions, meaning that you can enter partial name, SSN, date of birth, and/or unit # at will.
- Picis can disable the **New Patient** button until both an OR Manager database search and HIS search have been conducted. This feature makes it more difficult to inadvertently add duplicate patients to the database. Contact the Picis Client Center for more information.

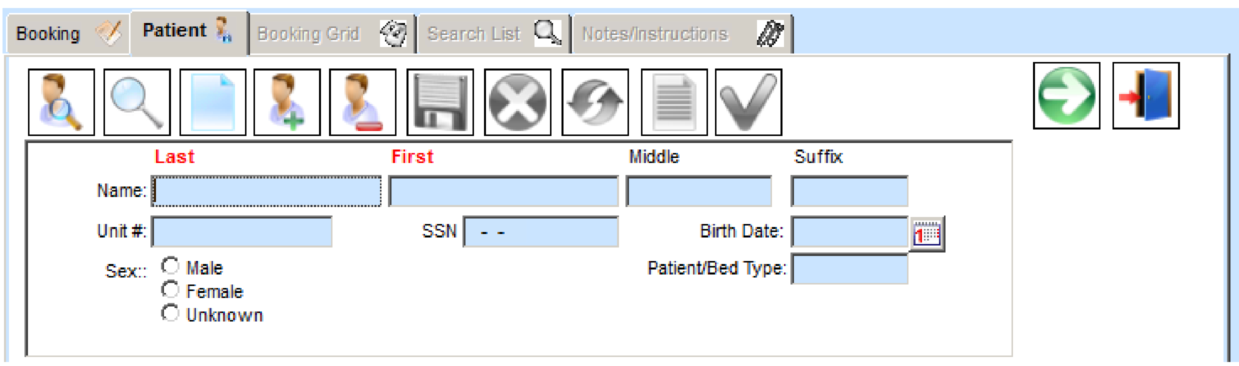
  See the *Security Manager User Guide* for more details.
- See *Booking and Case Record Internals* on page 28 for an explanation of what happens in the system when you choose various options.

Patient Tab: Patient Search Details

This section gives detailed instructions on how to search for an existing patient or enter a new patient into the OR Manager booking system.

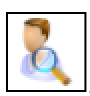
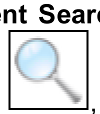
Recommended Search Methods

Search for a patient

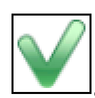


1. Enter your search criteria in the fields provided. You do not need to complete all fields.

   Best Practice: The fastest and most reliable search method is to enter the patient's Unit Number.

2. Click the **Patient Search** button, , to search the OR Manager booking system or the **MRI Search** button, , to search your HIS system.

   The bottom of the screen lists the patients who meet your criteria:

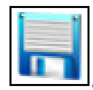
3. Double-click the patient's name or select the patient and click the **Select** button, .

   The **Patient** tab forms open. The first form is displayed..
4. Complete the forms.c
5. Click the **Save** button, , to save the **Patient** tab information.

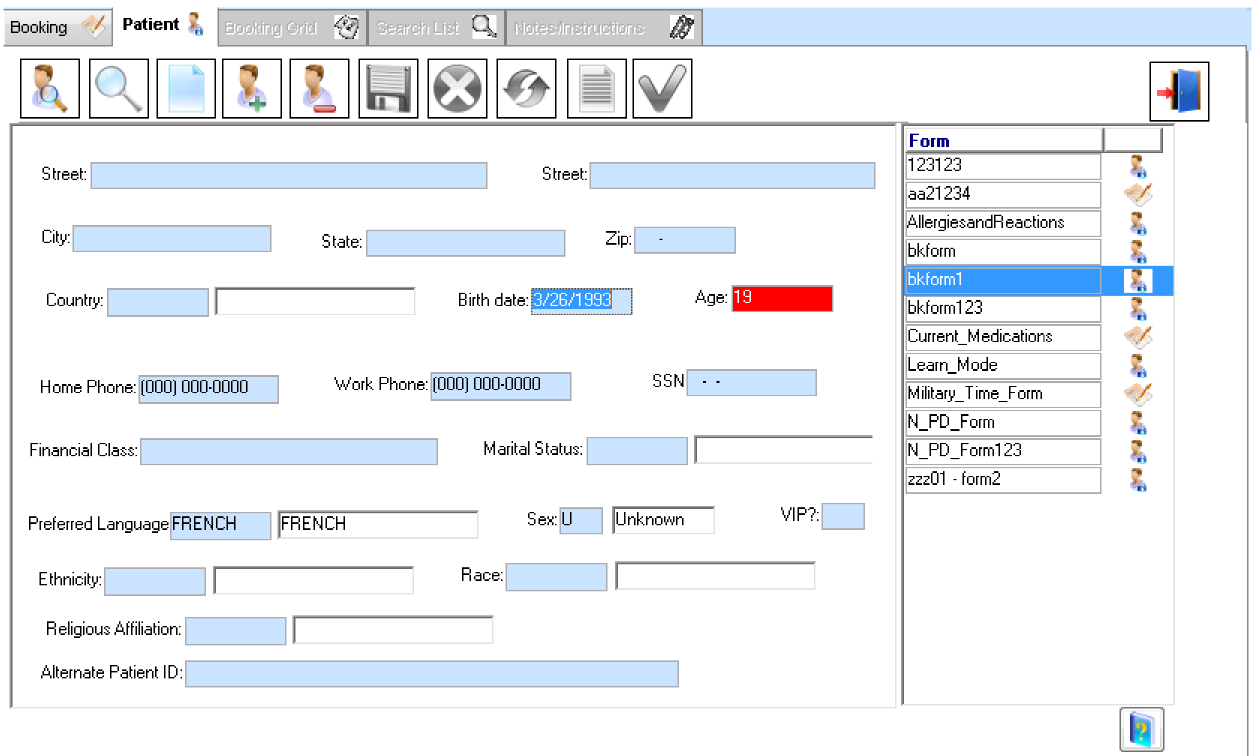
Enter a new patient in the OR Manager booking system

Note: Before entering a new patient you should be certain the patient is not already in the OR Manager database or the HIS system.

1. Click the **New Patient** button, .

2. Add or edit the new patient information, then click the **Save** button, .

   The **Patient** tab user-defined forms open. The first form is displayed..



3. Complete the user-defined forms.

4. Click the **Save** button, , to save the **Patient** tab information.

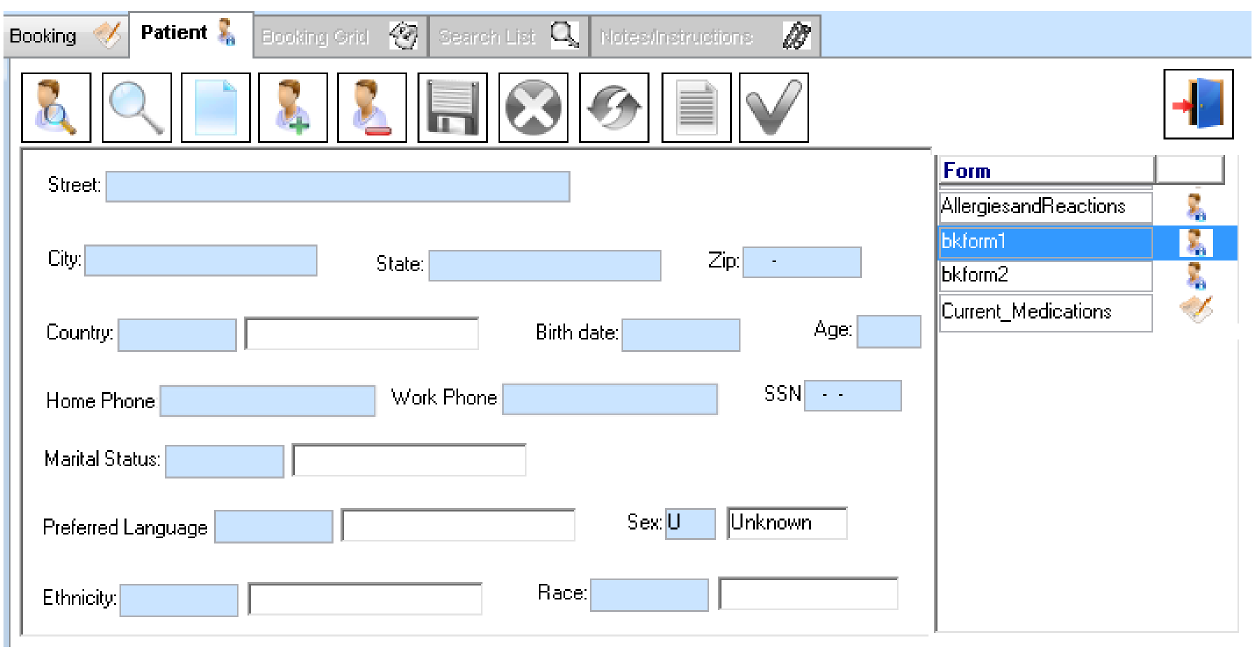
Patient Tab: Forms

For a patient to be booked for a procedure in OR Manager, his or her personal and booking (medical) data must be entered onto the **Patient** tab. In Forms mode, the **Patient** tab is made up of user-defined forms in which you enter, edit, and view patient information.

Note: When OR Manager is opened from within Preop Manager, another module of Picis Perioperative and Critical Care, OR Manager opens this tab to show users preoperative patient data.

Note: The non-editable home medications data in the patient form, which includes Date Last Taken and Time Last Taken, can be entered with data from Preop Manager. When a case record is started from a booking that includes home medications data, the case record includes the home medications data. Fluids shown with Order Volume in the data can include parenteral nutrition, blood derivatives, and intravenous solutions. Radiographic materials, contrast agents, and dyes appear in the same format as medications.

This illustration shows the **Patient** tab opened to a typical form. However, it probably does not look exactly like any form at your facility because all screens in the **Patient** tab are individually customized for each facility.



User-Defined Screens

OR Manager stores patient data, both personal and procedural, on user-defined screens, or forms. These customized screens contain the two types of forms:

- **Patient forms**: Patient forms contain patient data that is not specific to the current visit, such as the patient address. They are identified on the user-defined screen by the following icon: 

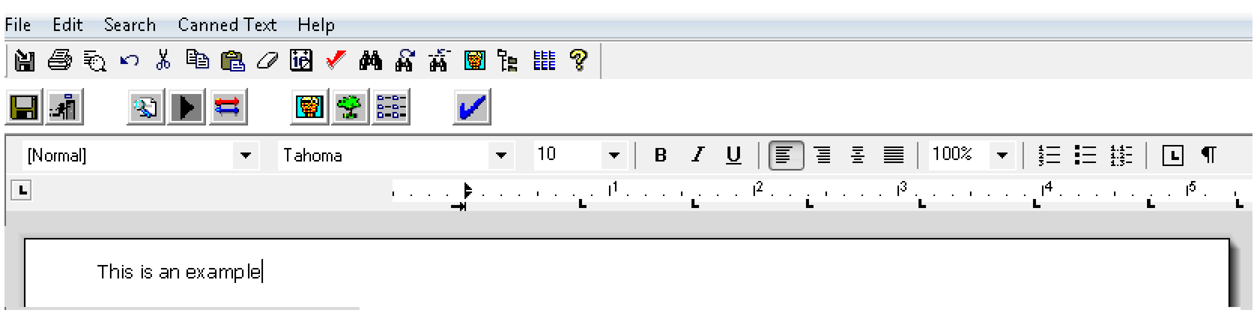
  Data entered into patient forms stays with the patient from booking to booking. If you are booking a patient who already has a record in OR Manager, his/her patient forms fill in automatically, and can be updated to reflect changes.

- **Booking forms**: Booking forms contain booking-specific data that is different from visit to visit, such as procedure, surgeon, anesthesia type, etc. Booking forms must be filled in for each new case. They are identified on the user-defined form by the following icon: 

Using Word Processing Fields

In addition to entering free form text, if you are using the Picis Word Processor, you can use the Canned Text menu to insert pre-written text into your document. If you are using Microsoft Word as your word processing tool, the canned text menu is not available.

WP documents can be set up in user-defined screens to be associated with particular body images or categories of canned text. However, a document need not be set up for canned text in advance; you can use the Canned Text menu from any document at any time to acquire canned text to use in your document or change the body images and/or canned text already associated with it.



The Microsoft Word interface for word processing allows you to edit user-defined word processing fields within a booking or case record.

> **Note:** Microsoft Word macros need to be enabled in order to avoid potential error messages when opening these fields.

See the *OR Manager Configuration Guide*: Canned Text & Body Images.

Required Fields

Fields on the user-defined forms in the Booking screen or in case record screens can be *mandatory* or *recommended*.

- **Mandatory**: Based on the default setting for the application parameter **skip_cr_required**, you must have valid data in the field before you can proceed.

  If the **colorcode_ud_fields** is set to “Y”, required (mandatory) fields appear on the screen with white text against a red background.
- **Recommended**: It is recommended that you put valid data in this field, but you can proceed without it. If the **colorcode_ud_fields** is set to “Y”, recommended fields appear on the screen as black text against a yellow background.
- **None**: You can leave the field blank.

If you try to book a patient or save a case record before filling in the Mandatory or Recommended fields, the Required Fields screen appears, stating which Mandatory and Recommended Fields are blank.

If you are missing a field of the following type, take the action indicated:

- **Mandatory Field**: Click **Enter Responses** and complete the field.

Note: If application parameter **skip_cr_required** is set to "Y," **Continue** is active, and you can skip mandatory fields, although Picis does not recommend this practice.

- **Recommended Field :** Take one of the following actions**:**
  - Click **Enter Responses**, then complete the field
  - Click **Continue** to leave the field empty.
- See the *Security Manager User Guide*.

Standard Fields and Groups

Your booking forms may contain Picis standard fields and/or groups. These fields and groups default Procedure Description, Position, and Site information from the **Booking** tab into the Patient tab for up to four surgeons. You can edit the data in these fields without affecting the data in the **Booking** tab or Procedure dictionary. That is, any modifications you make apply only to the current booking.

Example: The description from the Procedure dictionary is “Diagnostic Laparoscopy.” On the **Patient** tab, you modify it to read “Laparoscopic RT Cystectomy with possible Laparotomy” for just this one operation.

It is important to note the following:

- These fields on the **Patient** tab can only be modified manually.

- After you have modified the default information, your changes remain, even if the original procedure information on the Booking tab has been modified or deleted.

Note: The list of user fields for Case Records, Case Record Patient Data, Patient Data, and Booking Data user-defined fields can be filtered by Standard, TPA Shared, Content Library loaded, and client created (Custom) fields. If any of these specific field types do not exist, the selection box does not display.

In this example, the form related to progress notes is called "tiub_03_Case_Booking_fhcc", but your hospital may use a different name.

View Booking Data

View Booking Data is a read-only version of the **Patient** tab that is used for looking at booking and patient form information. Click on any entry in the Form section to view the contents of the associated form.

You can get to the View Booking Data screen from a number of places within OR Manager. If administrators have set permissions for you, you may see the audit icon immediately in front of the label for a field. 

This icon indicates that the field value was changed and saved more than once. You can click the audit icon once to see the Field Level Audit Trail screen for the field. The Field Level Audit Trail screen provides information about changes in the values in the field. For more information about the Field Level Audit Trail screen, see *Managing Bookings*.

For multi-line fields, the audit icon appears in the upper left-hand corner of the group of lines. The audit icon for these fields can indicate two changes and saving of the same data, but it can also appear where two lines were entered at the same time.

You cannot see the Field Level Audit Trail for an unsaved booking, and clicking the audit icon on an unsaved booking displays a message stating this. The Field Level Audit Trail for a patient on an unsaved booking can be displayed from the Patient Form, but it displays only the patient name, and all of the other fields are blank.

If two users are working with fields in the same form, changes made by one user are not shown by updating the audit data or making the icon visible for the other user until the other user leaves the form and returns to it.

Similar Booking Search

Sometimes, a patient is inadvertently double-booked.

- The patient is scheduled for the same surgery on the same day, but in different rooms.
- The patient is scheduled for the same surgery on different days.
- The patient is scheduled for different surgeries within a few days of each other when the procedures could have been combined into the same surgery.

The Similar Patient Booking Search screen solves this problem by enabling you to see bookings for patients with similar names or birth dates who have been booked for procedures within a certain number of days before and after the booking you are making. Then you can determine whether they are the same patient and, if so, whether to continue the booking.

If patients with similar names or birth dates are found, the Similar Patient Booking Search screen appears during the booking process after you have entered the patient's name, booking date, and time. (The point at which that occurs depends on the search method you are using.)

There are two ways to set up parameters to find similar bookings:

- Similar Booking Parameters screen.
- Similar Booking screen.

Similar Booking Parameters Screen

To set up or change default parameters for all operations, use the Similar Booking Parameters screen, which is found at **Booking Options > Similar Booking Parameters**:

- You can change the range of days to be searched at **Number Search Days (+/-)**. This number is the number of days both before and after the operation booking date, and includes the surgery date.
- **Booking Status** enables you to choose the types of similar bookings you want OR Manager to search for. Choose **All** to search for all types of bookings.
- **Also Match DOB** allows you to make the patient's date of birth an element of the search. When **Also Match DOB** is selected, the search results show bookings for patients with the same name or date of birth. When **Also Match DOB** is cleared, the search results show bookings for patients with the same name only.

Similar Booking Screen

To change parameters after OR Manager has found similar bookings, use the fields in the Similar Booking Parameters screen. (See *Similar Booking Parameters Screen* on the previous page.)

- You can change the range of days to be searched at the **Number Search Days (+/-)** prompt. This number is the number of days both before and after the surgery booking date, and includes the surgery date.
- You can change the name of the patient you are searching for by entering a different name in the **Name** prompt. This feature is useful if you suspect that the same patient may have been booked under a different name.

Example: If you think that patient Joe Smith might have been previously booked as Joseph Smith or J.M. Smith, you could enter the name “Smith,J” to find all variations on the name.

- After changing the date range and/or name, click **Search** to do a new search. OR Manager will return all matches for the name and the date range.
- You can click on any column header to re-sort the list by that column.
- Click **Continue** to go ahead and make the booking.
- Click **Cancel** to cancel the booking process.

Refreshing Drop-down Lists

Menu:Tools > Refresh Dropdowns

You may need to add or change a dictionary or table entry that supports a drop-down list while you are working in the OR Booking screen or in the Surgeons/Anesthesiologists, Procedure, or Room dictionaries.

Example: The procedure you are booking calls for a piece of equipment that is not in the Equipment dictionary. You can add the equipment to the Equipment dictionary, then go back to the OR Booking screen and use **Tools > Refresh Dropdowns** to put it on the **Equipment** drop-down list.

Without leaving the OR Booking screen or the Surgeons/Anesthesiologists, Procedure, or Room dictionary screens, you can access any dictionary or table on the Maintenance menu, make the necessary additions or changes, then use the **Refresh Dropdowns** entry on the **Tools** menu to update the drop-down lists to reflect your changes.

Note: Inactive entries in the dictionaries do not appear in the drop-down fields for new bookings or case records. The only exception is when a user applies the Copy or Move/Edit functions for a pre-existing booking that already had inactive entries saved.

Booking Grid Tab

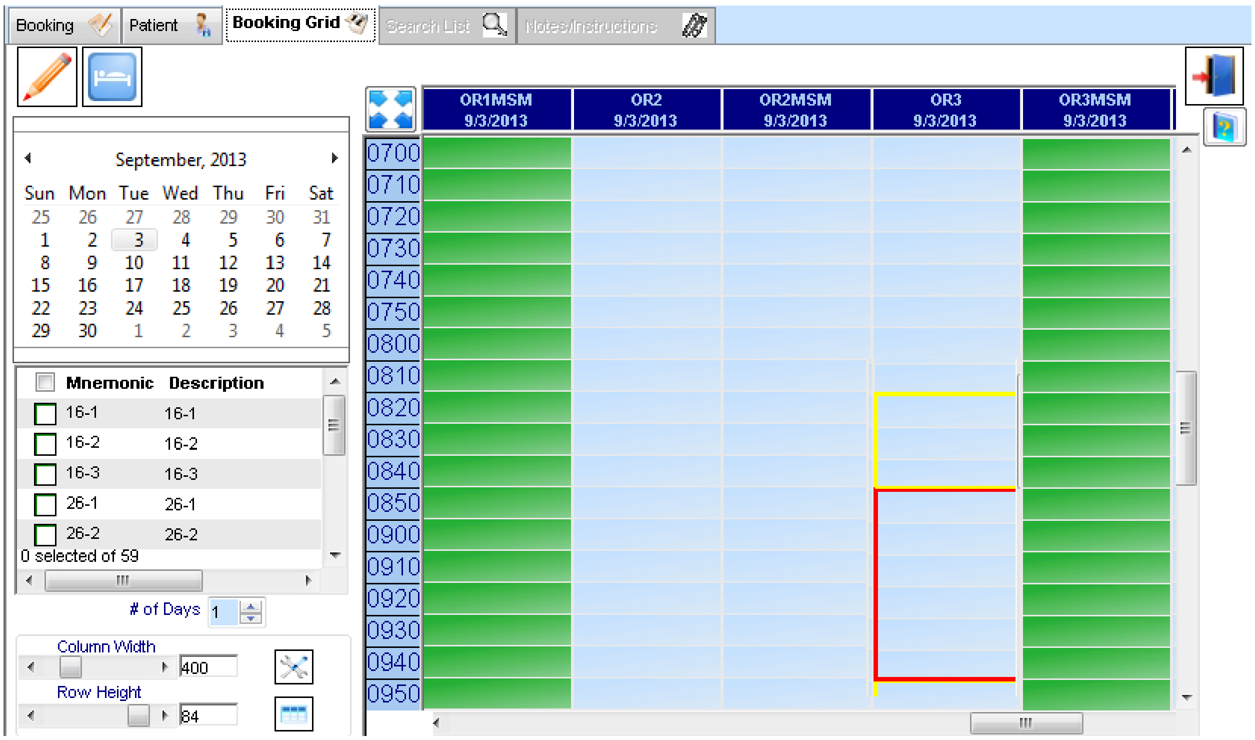
The booking grid lets you view the OR schedule at a glance.

Use the Booking Grid for the following purposes:

- View multiple rooms and days for available slots.
- Book surgeries.
- View existing bookings.
- View conflicts.

The following sections explain important **Booking Grid** Tab tasks:

- *Schedule a Surgery from the Booking Grid* on page 77.
- *Select Rooms for Display* on page 80.
- *Select/Deselect Display Fields* on page 81.



Booking Grid Intervals

The time intervals on the Booking Grid are set up by Picis at installation time. Your installation can have 5, 10, or 15 -minute intervals.

Expand/Contract Feature

After retrieving the rooms you want to view, you can expand the grid by clicking on the icon at the top of the time column:

To collapse the grid, again click on the icon at the top of the time column:

Booking Grid Information

Information in the Booking Grid is carried in two forms:

- **Colors**: OR Manager uses colors to indicate room statuses, such as open, closed, block times, and time already booked. Many of these colors are user definable.
- **Text**: Text carries information about times that are already booked, such as surgeon, procedure, patient, etc. Text is also user definable.
- **Booking Grid Comments** are indicated by double arrows (**>>**) in a cell on the grid. You use the right-click menu to add, edit and delete comments.
  - An asterisk (*) next to a surgeon and/or procedure mnemonic indicates that there are multiple surgeons and/or procedures involved in the operation.
  - The Status Line at the bottom of the main screen frame also carries text information for the cell your cursor is over, including the text of the associated comment if the cell your cursor is over contains a double arrow.

Grid Colors

The following table shows the default color scheme used by the booking grid and schedule viewer for new installations. (For sites that are upgrading, the existing applied color scheme is preserved.) For information on changing the booking grid colors, see the *OR Manager Configuration Guide*.

Note: These are the defaults. Your site may use different colors.

Element	Default color	
Available Time	Yellow (RGB 255, 255, 0)	
Closed room	Pink (RGB 255, 128, 192)	
Booking*	Mauve (RGB 128, 128, 192)	
Block time	Blue (RGB 128, 255, 255)	
Single conflict	Dark Orange (RGB 255, 128, 0)	
Multiple conflicts	Teal (RGB 0, 128, 128)	

Note: * Depending on how your system is configured, certain bookings may have a color different to that defined in the color scheme. For example, the color of a booking may depend on the procedure category or anesthesia type set for the booking. It may also depend on the setting of a particular field on a booking form. (In the configuration, the field is called *booking_color*, but it may be named differently on the form.)
For more information, see the *OR Manager Configuration Guide*.

Room Selection Methods

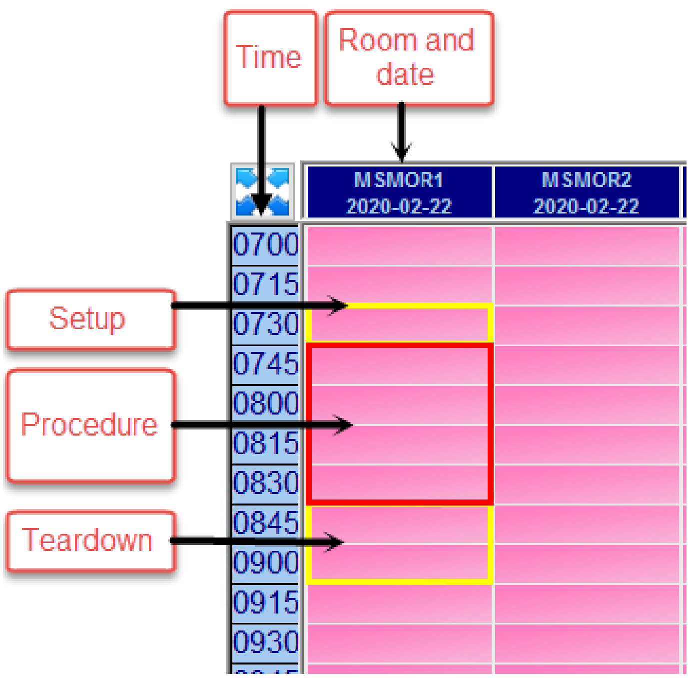
The box in the lower left lists the rooms in which you can schedule cases. Room selections are indicated by placing a check mark beside the room name on the list. You have several options for selecting rooms:

- Click **All** to select all the rooms.
- Click **Clear** to remove all the room selections.
- Click **Specific Room Grp** to select all the rooms.
- Select the boxes to the right of the rooms to select specific rooms.

Bookmark

You use the OR Manager bookmark to book a case on the Booking Grid. A bookmark represents a case's length, including setup and teardown times.

This is an example of a bookmark.



In the example you are booking Room *MSMOR1*.

- **Date**: February 22, 2020.
- **Time**: 07:30-09:15 (105 minutes total).

- **Procedure**: 60 minutes.
- **Setup time**: 15 minutes.
- **Teardown time:** 30 minutes

Schedule a Surgery from the Booking Grid

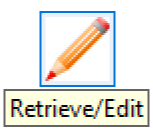
1. Using the calendar on the left side of the **Booking Grid** tab, click the first day you want to display room schedules for. The default is the date selected in the Booking tab. If no date was entered, the default is the current date.
2. Select the rooms or room groups that you want to display from the list on the Booking Grid. The defaults are the rooms selected in the **Booking** tab.

   > **Note:** For multi-facility installations, all room groups from all facilities appear in the **Select Room Group** drop-down list. However, if you want to select room groups from a facility other than the one you are currently in, you must change facilities using Booking Options > Select Facility.

3. Select the **# of Days** of the rooms' schedules you want to display.

   > **Note:** The default is a number selected in the **Booking** tab. If no number was entered, the default is "1".

4. Click the **Retrieve/Edit** button.

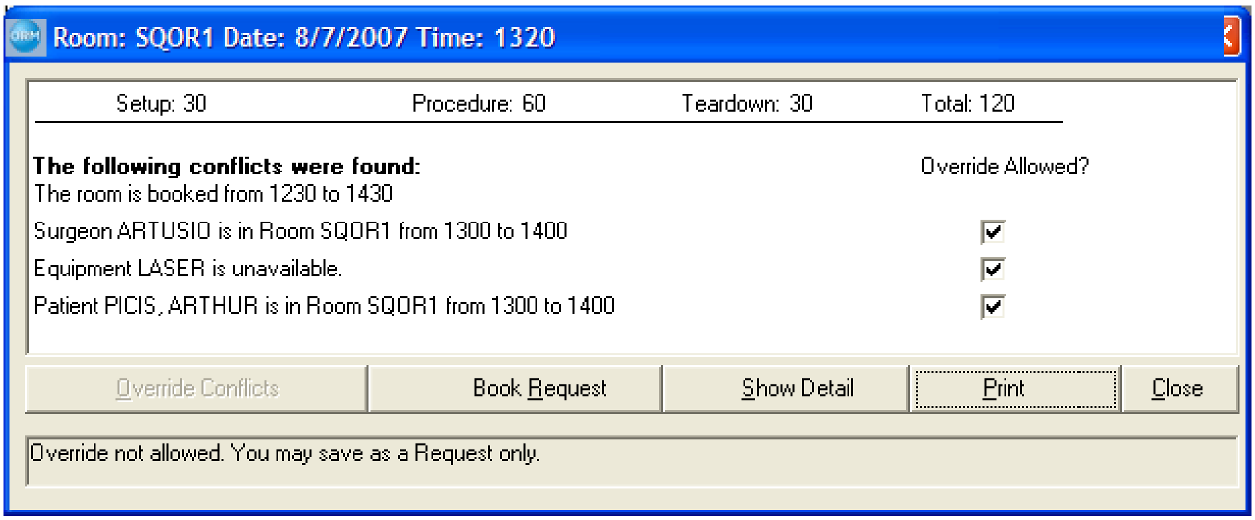
   

   Or double-click the date you selected in step 1.

   > **Note:** You can use the double-click feature at any time to easily reset the first date of the display.

   The rooms and dates you selected appear in the Booking Grid.
5. Move the mouse pointer over the Booking Grid.

   The OR Manager bookmark appears under the pointer.
6. Move your bookmark to an open block.
7. Right-click and select **Book Here.**
8. The time you want to book is checked for conflicts. If no conflicts are found, the booking is saved. Otherwise, a screen comes up listing the conflicts. You can either override the conflicts and add it to the schedule (with the appropriate access rights), book it as a request, or close the screen and book into another room or time.



Note: When the booking primary procedure/surgeon is setup to send a booking notification email and the trigger is set to prompted, the system will prompt the user before sending the email. See the *OR Manager Configuration Guide* Booking Auto Email Settings.

Right-click Menu

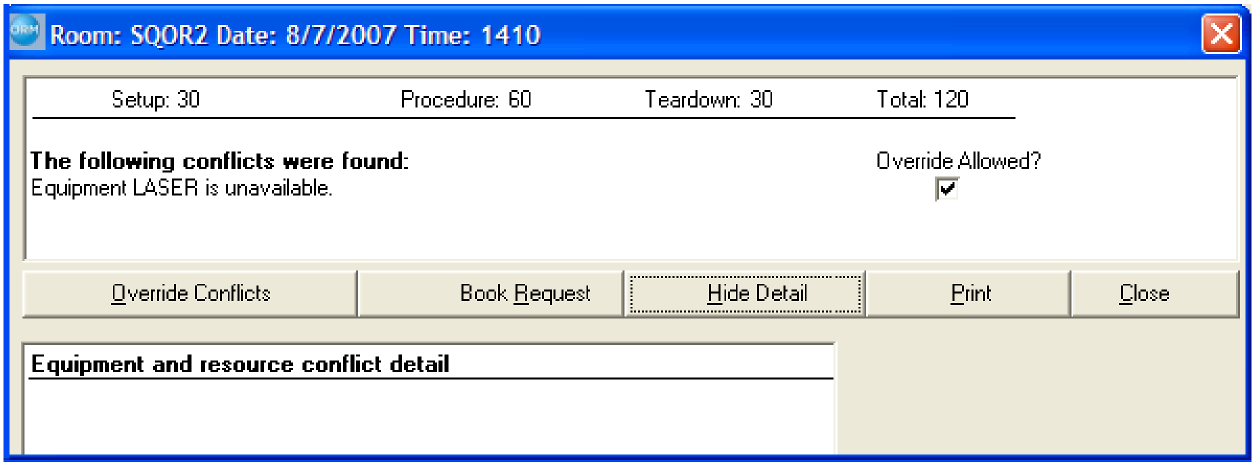
The options change when you right-click on the Booking Grid, depending on where your cursor is on the grid.

- **Book Here**: Books the procedure. If there are conflicts, OR Manager automatically notifies you about them and allows you to override the conflicts if you are authorized to do so.
- **View Conflicts for Time Slot**: Shows conflicts for the slot and whether overrides are an option for each conflict shown.

Note: If this menu selection is grayed out, there is not enough available time to fit the booking on the grid. It is possible that there is another booking on the grid below the time slot.

- **View Conflicts for Booking**: Shows conflicts for the booking (surgeon, equipment, etc.) and whether overrides are an option for each conflict shown.

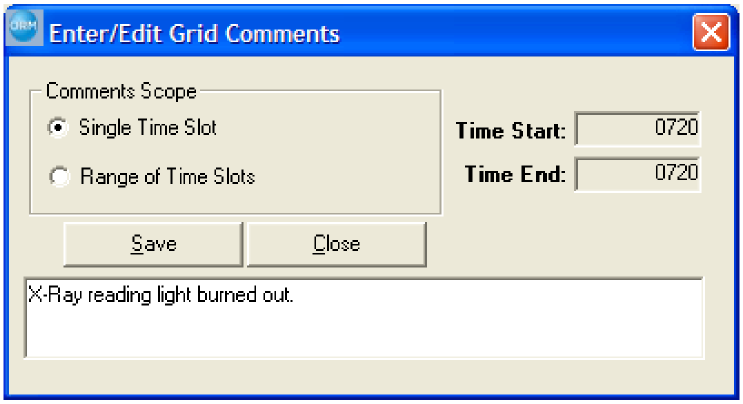
  Both of the view conflict screens have a button that toggles between **View Detail** and **Hide Detail**. **View Detail** provides additional information about equipment and resource conflicts:



- **View Booking**: Available when the mouse is over a booking that is already on the grid, this selection shows a read-only summary of the booking.
- **Move Booking**: Available when the mouse is over a booking that is already on the grid. This selection allows you to move an existing booking to a different time slot.
- **Cancel Booking**: Cancels the booking (afterrequesting a reason).
- **Wait List Booking**: Places the booking on the wait list (after asking you to assign it a wait list priority).
- **Pick Rooms For Display**: Opens the screen to select the rooms to display on the Booking Grid.
- **Select Display Fields**: Opens the screento select what fields to display on the Booking Grid.
- **View Comment**: To view a comment, right-click on a cell containing a double arrow (>>) to open the right-click menu, then select **View Comment.**

  The View Comments screen, similar to the Enter/Edit Grid Comments screen, appears.
- **Enter/Edit Comment** : This selection allows you to create and edit comments anywhere on the grid.
  - To enter a comment, place your cursor over the cell where you want the comment to go and right-click. Select **Enter/Edit Comment**.
  - To Edit a comment, place your cursor over a cell containing a double arrow, right-click to open the right-click menu, then select **Enter/Edit Comment**.

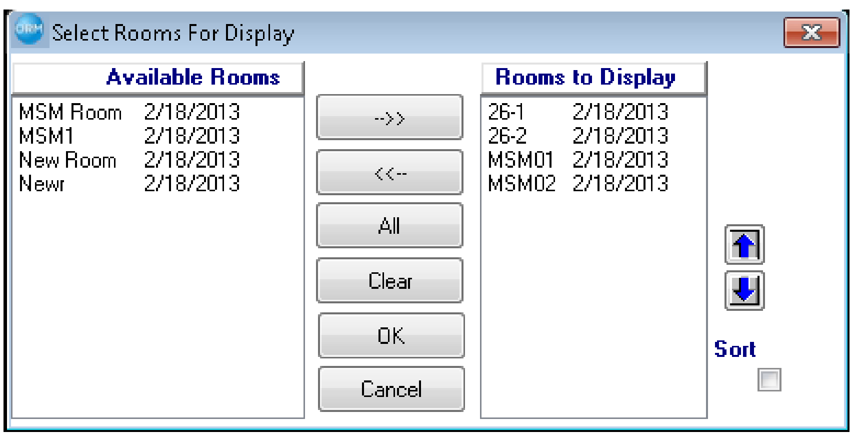
  The Enter/Edit Grid Comments screen opens:



- **Delete Comment**: To delete a comment, place your cursor over a cell containing a double arrow, right-click and select **Delete Comment**.

Pick Rooms for Display Option

Select **Pick Rooms for Display** on the right-click menu to select which rooms display on the Booking Grid.



Select Rooms for Display

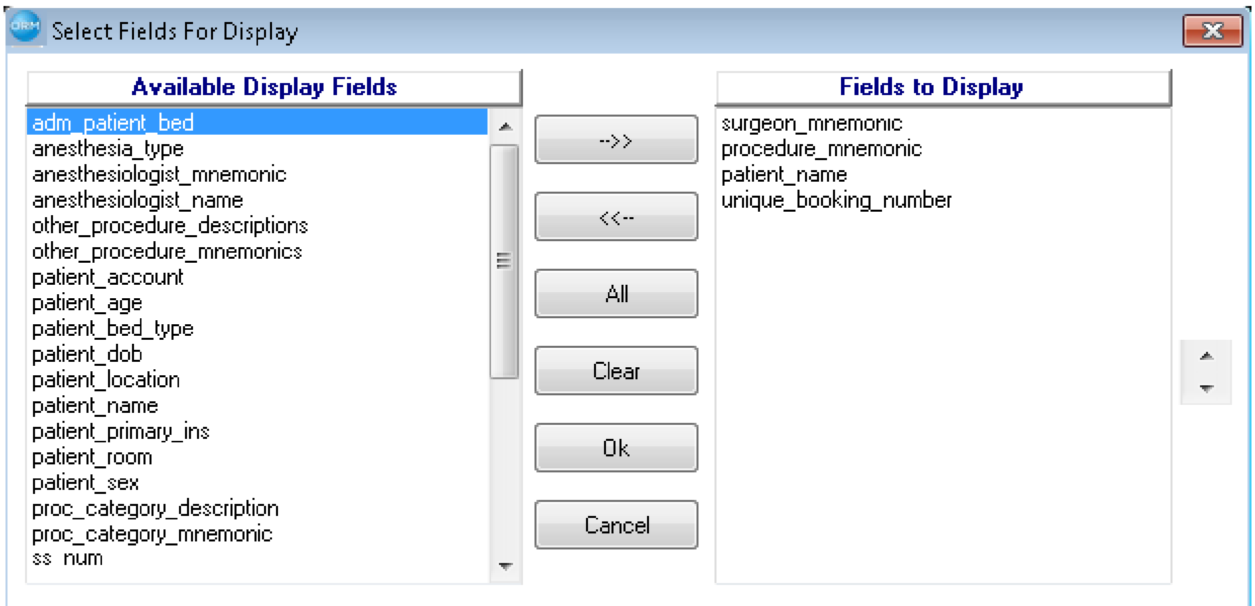
1. Select the **Available Rooms** to display (in the left column) and click the right arrow.

   The rooms appear in the **Rooms to Display** column.
2. Click **OK**.
3. To select rooms you no longer want to display, highlight the displayed rooms (in the right column) and click the left-pointing arrow.

   The rooms move back to the **Available Rooms** list.
4. Click **OK**.

Select Display Fields

Use **Select Display Fields** from the right-click menu to select which fields display on the booking grid.



Select/Deselect Display Fields

1. Select the **Available Display Fields** to display and click the right-pointing arrow button.

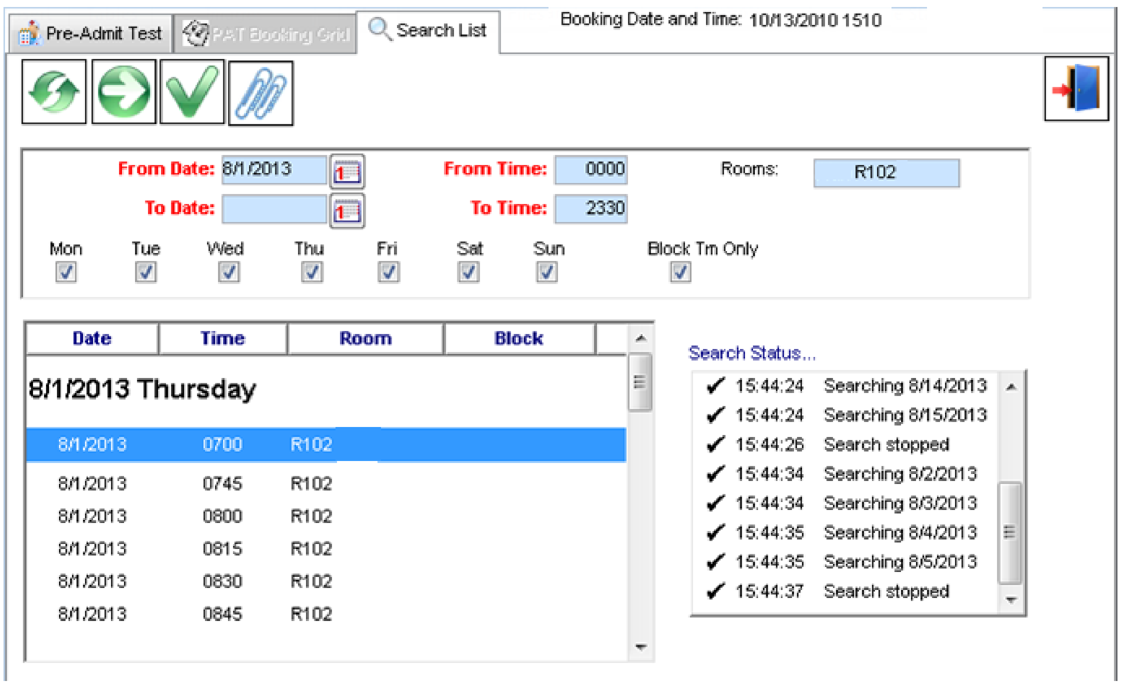
   The fields appear in the Fields to Display column.
2. Click **OK**.
3. To select the fields you no longer want to display, click to select the fields in the Fields to Display column and click the left-pointing arrow.

   The fields move back to the Available Display Fields list.
4. Click **OK**.

Search List Tab

The **Search List** tab opens as a result of using the Search List method on the **Booking** tab.

Below is an example of the **Search List** tab.



When the room list appears, you can select a room, date, and time by double-clicking it, or you can click to select an entry and then click **Select**.

Search Tips

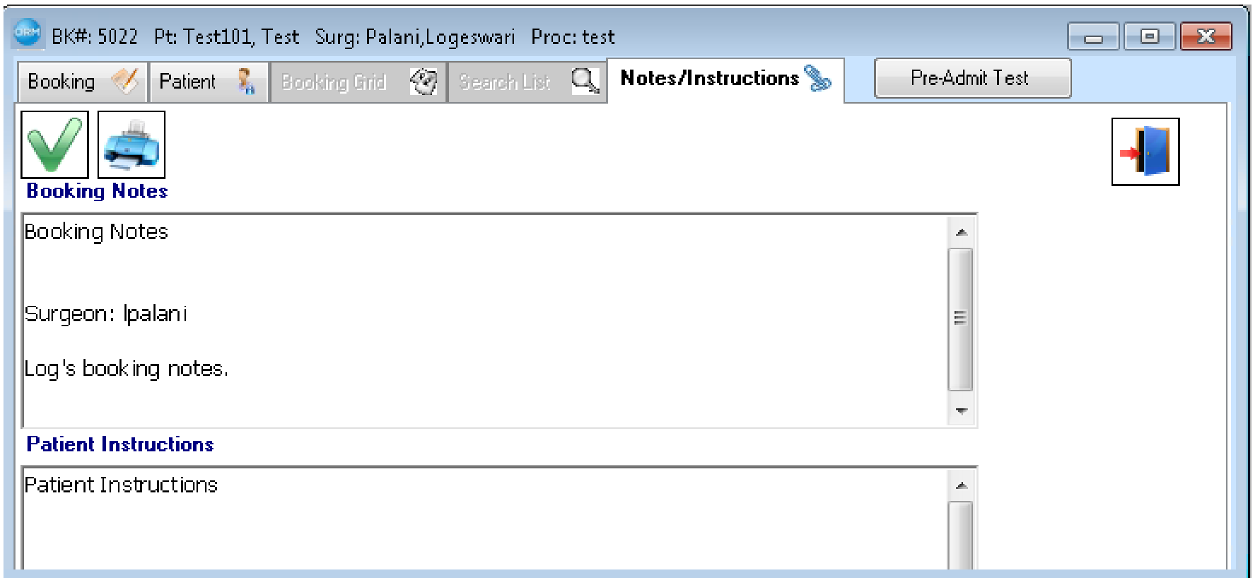
- If a suitable room, date, and time comes up on the list before the search is over, you can save time by clicking **Stop Search.**
- You can change the search criteria in the top of the screen and start another search by clicking **Start Search**.
- To resume a search after stopping, click **Continue Search**.

Booking Notes/Patient Instructions

Booking Notes and Patient Instructions are stored in the Booking Notes dictionary and linked to surgeons, procedures and/or dates for display in the Booking screen. They do not appear in the Booking screen unless the surgeon, the procedure, and/or the date range meet the criteria specified in the Booking Notes dictionary.

Notes are for doctors and nurses about the procedures involved in the surgery are in the top screen.

- Instructions are for patients to read and follow before and after the surgery are in the bottom pane.



There are two ways to view the Booking Notes and Patient Instructions:

- Select the **Notes/Instructions** tab.

Note: If the tab is not active, there are no notes or instructions that meet the display criteria.

- Click the **Go** button.

See the *OR Manager Configuration Guide*: Booking Dictionaries.

Pop-up on Go

By default the system is set up to display the booking notes and patient instructions when the user clicks the **Go** button.

You can disable this feature by setting the application parameter **show_notes_on_go** to "N."

Using the Pop-up on Go feature depends on several combinations of application parameter settings and circumstances:

- The **Notes/Instructions** tab will pop up on Go if parameter **show_notes_on_go** does not exist or is set to "Y" and either of the following is true:
  - Parameter **booksheet_min_always** is set to "N."
  - Parameter **booksheet_min_always** is set to "Y" and all required fields are not filled in.
- The **Notes/Instructions** tab will not pop up if parameter **show_notes_on_go** is set to "N" or one of the following is true:
  - The booking is for the waitlist.
  - The booking is a request.
  - Parameter **booksheet_min_always** is set to "Y" and all required fields are filled in.

Isolate Patient Context from Booking

Depending on the system configuration, schedulers without rights to use clinical applications may be able to open multiple booking sheets at a time. (Ordinarily, a user can only open one booking at a time.).

With this configuration, schedulers with no access to clinical modules will have the following permissions:

- Schedulers can open multiple booking sheets at one time.
- Schedulers can open case records.

Note: The **Other Applications** menu option is disabled for these schedulers along with the Anesthesia Manager and Preop Manager options on the main toolbar.

5

Pre-Admit Tests

Menu:File > New Booking
Menu:Tools > Manage Pre-Admit Bookings
Menu:Tools > Schedule Viewer
Menu:Booking Options > Pre-Admit Test Booking

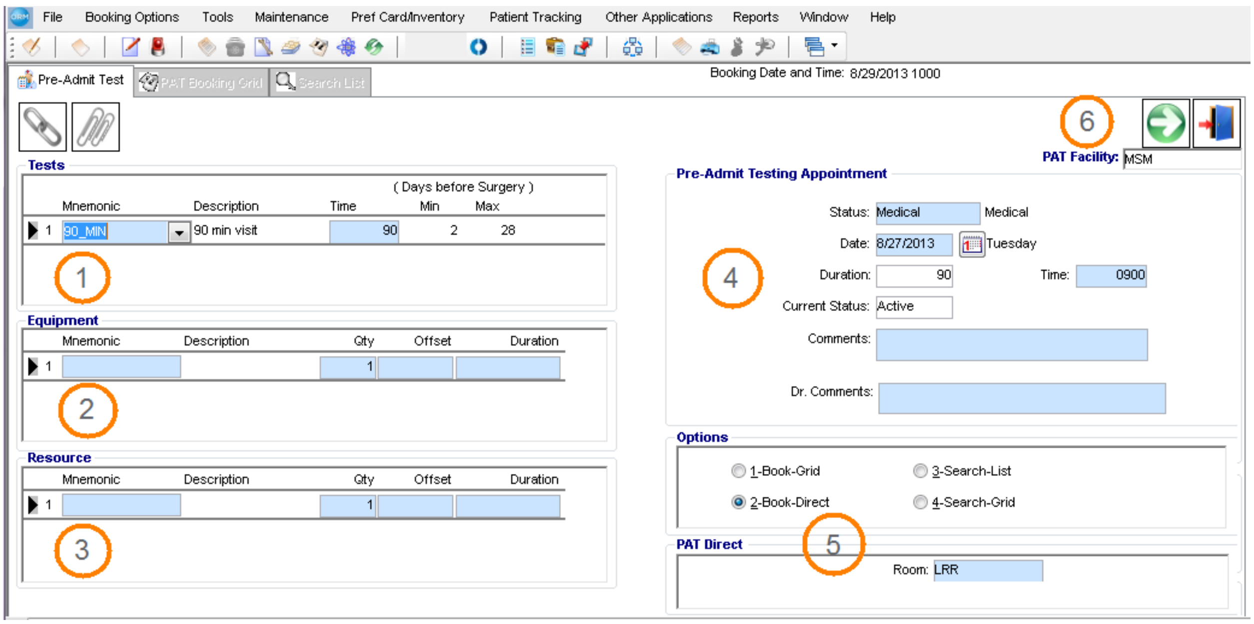
OR Manager makes scheduling Pre-Admit Tests (PATs) easy, allowing you to book a PAT any time after booking an operation.

In this chapter we show you how to book PATs, and we explain your options for booking, viewing, and editing PATs.

This chapter covers the following topics:

Quick Start: Booking a PAT

After accessing the PAT screen, booking a PAT is much like booking a surgery. This illustration and the steps that follow show you how to book a PAT.

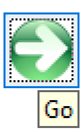


Book a PAT

1. Within the Tests section, for **Mnemonic** select the Test(s).
2. Select the **Equipment** needed for the PAT(s).
3. Select the **Resources** needed for the PAT(s).
4. Enter the **Pre-Admit Testing Appointment** specifics: **Status**, **Date**, **Time** (for Book-Direct only), **Duration, Current Status Comments** and **Dr. Comments.**

   Note: Text entered here prints on reports.

5. Select an **Option** (booking method). Booking Options work the same way as when booking a surgery. See *Booking Tab: Surgeon/Procedure Stats* on page 49.
6. Click the **Go** button to begin the PAT booking process.



Note: After selecting a Test (Step 1), standard equipment, resources, and duration are automatically populated. You can edit these fields as necessary. Doing this does not change the defaults established in the PAT dictionary.

PAT Screen

Menu:File > New Booking
Menu:Tools > Manage Pre-Admit Bookings
Menu:Tools > Schedule Viewer
Menu:Booking Options > Pre-Admit Test Booking

You use the PAT screen to book patients for pre-admit testing after you have booked them for an operation. Bookings in the **Active**, **Waitlist**, **Request**, or **Reservation** status can be used for PAT bookings .You cannot book a patient for a PAT before he/she is booked for a procedure.

The PAT Booking screen contains three tabs and **Pre-Admit Notes**:

- **Pre-Admit Test**: This tab is where you enter PAT information, such as test(s), equipment, and resources. See *Pre-Admit Test Tab* on the next page.
- **PAT Booking Grid**: This tab shows the PAT room schedule in grid form. The **PAT Booking Grid** tab is functionally the same as the OR Booking screen Grid tab. See *Booking Grid Tab* on page 73.
- **Search List**: This tab shows the PAT room schedule in list form. The **PAT Booking Search List** tab is functionally the same as the OR Booking screen Search List tab. See *Search List Tab* on page 81.
- **Pre-Admit Notes**: Allows you to view pre-admit notes.

Note: An appendix in the *OR Manager Configuration Guide* provides information about the transition between different versions of ICD codes. It describes the behavior that determines which code version or versions are visible as you work in PAT bookings.

Access the PAT Screen

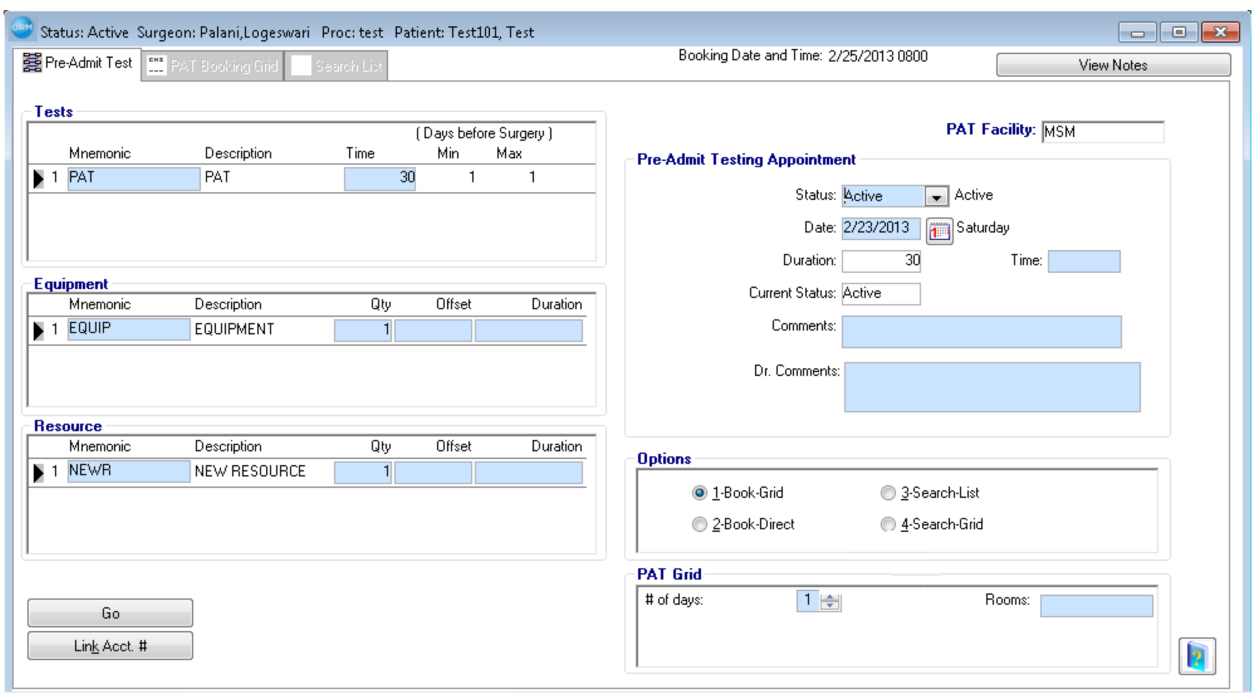
The following table describes the different ways to open the PAT screen.

Task	Method
Book a PAT immediately after booking the surgery	**Pre-Admit Test** button on the OR Booking screen. .

Task	Method
Edit a PAT that has already been booked	**Tools > Manage Pre-Admit Bookings.** *Managing Pre-Admit Bookings* on page 108.
Create a new PAT booking or edit an existing one	**Tools > Manage Bookings.** *Managing Bookings* on page 95.
	Tools > Schedule Viewer. *Schedule Viewer* on page 111.

Pre-Admit Test Tab

The **Pre-Admit Test** tab is the launching point for PAT scheduling. It is where you select the tests, equipment, and resources, and initiate PAT bookings using one of four booking options.



Book a PAT

1. For **Mnemonic** within the Tests section, select the test you want to schedule.

The Description, test duration in minutes, Minimum and Maximum Days Before Surgery, Equipment, and Resources default in from the PAT Test dictionary.

2. Edit the default values as necessary.
3. With the parameter setting *pat_rooms_nonfacility_specific*, you can select a PAT facility different from the default. In other words, the PAT does not have to be done in the same facility as the operation.

   For more information, see the *Security Manager Users Guide*.

> **Note:** The default date in the **Date** field is determined by subtracting a certain number of days from the operation date. The number of days is stored in the parameter *pat_default_days* and can be changed. Contact the Picis Client Center for information.

4. Repeat the steps above as necessary to add more tests.
5. For **Status** within **Pre-Admit Testing Appointment**, select the patient's status. The options are from the Pre-Admit Test Status standard table.
6. Select a booking type under **Options**. (PAT booking methods work the same way as those on the OR Booking screen. See Booking Tab: Surgeon/Procedure Stats on page 49.)
7. Click the **Go** button.

   Depending on the booking option you selected, OR Manager immediately begins conflict-checking (Book-Direct), takes you to the booking grid (Book-Grid, Search-Grid), or takes you to the Search List.
8. Complete the booking (as you would complete an OR Booking).

For more information, see the *Security Manager Users Guide*.

6

Managing Bookings and Booking Tools

Overview

The manage screens enable you to search for bookings that share characteristics, such as surgeons or procedures. More complex and custom searches are also available. For example, finding all surgeons who are performing several types of cardiac procedures within the next three months.

Searches typically serve a particular purpose, such as changing all bookings scheduled for one room to another room, or rescheduling all operations for a surgeon.

Each manage screen has a different function as described below.

- **Manage Bookings** to locate and work with OR bookings.
- **Manage Pre-Admit Bookings** to locate and work with PAT bookings.
- **Schedule Viewer** to view and work with bookings in a grid format.
- **Rearrange a Day** to move bookings from room to room and time to time within the same day.

These four booking management options on the Tools menu provide the ability to search for and edit OR and PAT bookings. The drag-and-drop feature rearranges schedules, prints report, edits booking, books Pre-Admit Tests, along with other booking functions.

This chapter covers the following topics:

- Manage Screen Searches
- Managing Bookings
- Managing Pre-Admit Bookings

- Schedule Viewer
- Rearrange a Day
- Rearrange a Day: The Booking Queue
- Rearrange a Day: Fine Tuning Your OR Schedule
- Rearrange a Day: More Booking Options
- Block Time Inquiry
- Request Inbox

Manage Screen Searches

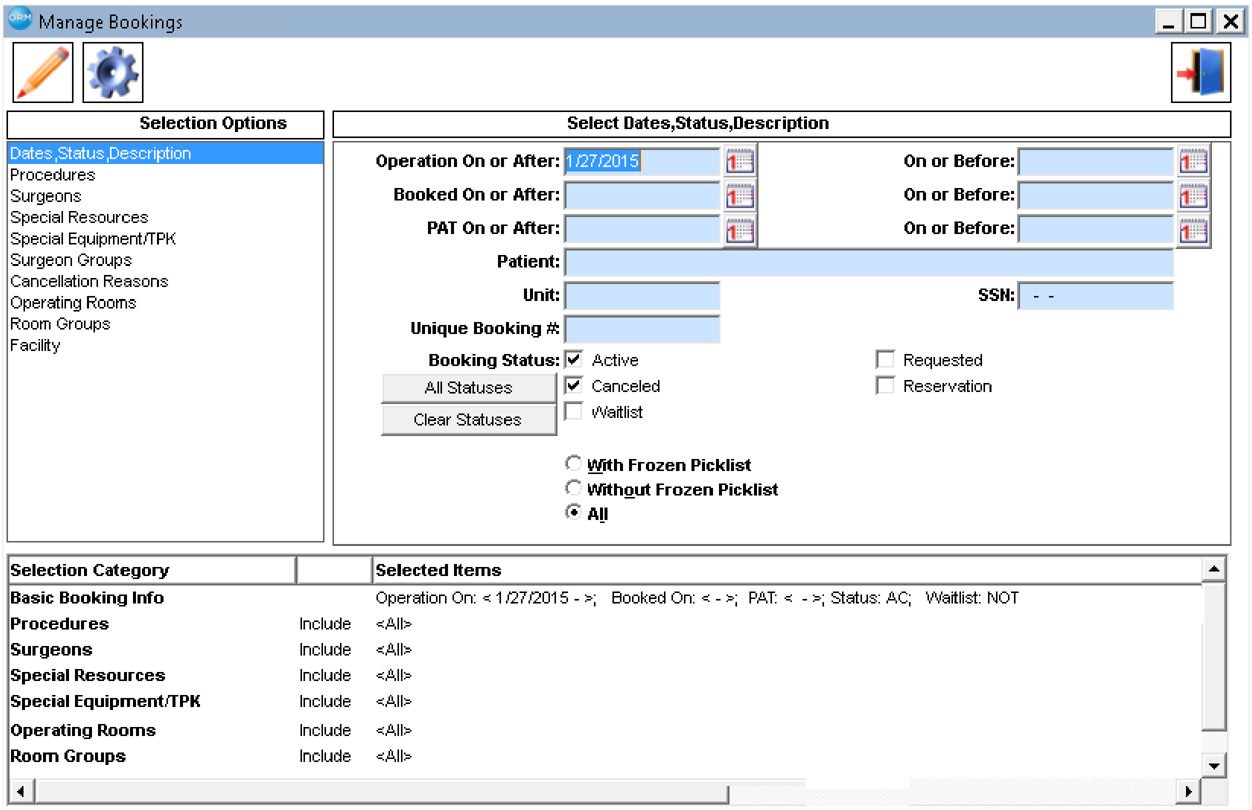
Using the Manage Bookings and Manage PAT Bookings menu options, as well as the Manage Case Records option, involves two screens:

- A manage screen, where you enter search criteria.
- A manage options screen, where you select cases from the list returned by the search.

Manage Bookings Search Screen Features

This section describes how to use manage screens, including various boxes, search options, and buttons. Note that not all the features described here are on all of the manage screens.

This is an example of a typical Manage Bookings search screen.



Selection Options

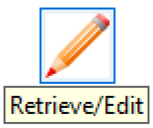
The Select Options are categories of selection criteria. Clicking each category opens a screen where the corresponding search criteria is entered.

Selection Option	Description
Dates, Status, Description	Specify the date range(s), patient information or booking information to search for. **Date, Patient, Unit, Booking Number, and Social Security Number (SSN) Data** — Specify these by selecting the boxes. **All Statuses** or **Clear Statuses** specifies the booking statuses of interest, click **All Statuses** to select every statusand select **Clear Statuses** to clear every status. Selecting **All Statuses** requires the **Waitlist Priority** and Number of **Days waiting** range to also be defined. **All**: Select this to make the occurence of frozen picklists irrelevant to the search or select **With Frozen Pick** list or **Without Frozen Picklist**.
Procedures	Lists the active Procedures in the Procedures dictionary from which you can select to Include or Exclude in your search.
Surgeons	Lists the active Surgeons in the Surgeons dictionary from which you can select to Include or Exclude in your search.
Special Resources	Lists the active Special Resources in the Resources dictionary from which you can select to Include or Exclude in your search.
Special Equipment/TPK	Lists the active Special Equipment in the Equipment dictionary, as well as the TPK Packs fromthe TPK dictionary from which you can select to Include or Exclude in your search.
Sugeon Groups	Lists the active Surgeons in the Surgeon Group type of the Room/Surgeon/Procedure dictionary from which you can select to Include or Exclude in your search.
Cancellation Reasons	Lists the active Cancellation Reasons in the CANREAS User Defined Table from which you can select to Include or Exclude in your search.
Operating Rooms	Lists the active OR type Rooms in the Rooms dictionary from which you can select to Include or Exclude in your search.
Room Groups	Lists the active Rooms in the Room Group type of the Room/Surgeon/Procedure dictionary from which you can select to Include or Exclude in your search.
Facility	Lists the active Facilites (based on the user's access) in the Facilities dictionary from which you can select to Include or Exclude in your search.

Custom Field Select enables you to create and save your own search parameters, including your custom fields and relationships between fields. for complete information on using **Custom Field Select**

The **Clear List** button (not shown on the preceeding screenshot) removes the check marks from all entries in the current **Select Options**. Using **Clear List** does not affect the other sets of selection options. For example, clearing all of the Surgeon selections does not affect your procedure selections.

The screen at the bottom records the selection choices you make as you make them, so you can see at a glance what criteria you have selected. If *no* items are selected, *all* items are automatically included in the selection criteria for that option

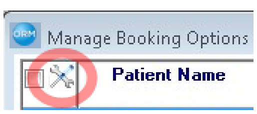


After entering the search criteria, click the **Retrieve/Edit** button to search for the corresponding bookings. The manage screen closes and the manage options screen opens with a list of bookings that meet your criteria.

Configure the Display

The following steps describe how to configure the display of the retrieved cases.

1. Click the configuration icon.

   The Select Columns to Display screen opens.
2. Click to select the **Available Columns** on the left and click the arrow to move them to the **Columns to Display** area on the right.

   Note: At least one search result column must be displayed at all times within Manage Bookings and Manage Cases. A warning message appears if at least one display field is not selected.
3. Click **Save** to save this configuration.

   Note: The Columns to Display settings are stored per user, per workstation.

Managing Bookings

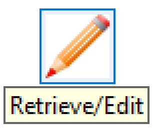
Menu:Tools > Manage Bookings

You use Manage Bookings to accomplish the following:

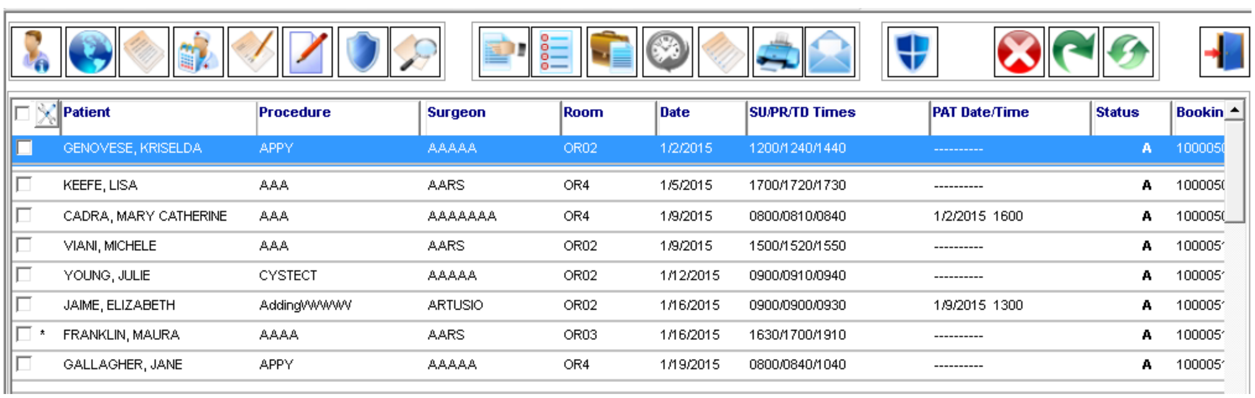
- Edit booking data (time, room, duration, etc.).
- View audit trails
- View and print schedules
- Print picklists and worksheets
- Edit patient data
- Cancel bookings

Select Bookings

1. If you are not already familiar with using manage screens, review *Manage Screen Searches* on page 92.
2. Enter your search criteria. Your selections appear under **Selected Items** at the bottom of the screen.
3. (Optional) Click **Custom Field Select** and enter your custom field information.
4. Click the **Retrieve/Edit** button.



The Manage Bookings Option screen opens and lists the bookings that meet your criteria.



Screen Notes

- An asterisk (*) next to a patient's name indicates a multiple procedure surgery.
- The **SU/PR/TD Times** column shows the beginning Setup/Procedure/Tear Down times for the procedure.
- The **PAT Date/Time** column shows the date and time of the Pre-Admit Tests for this case.
- The **Status** column uses these abbreviations:

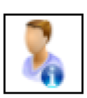
    - A — Active
    - V — Requested
    - C — Canceled
    - R — Reservation
    - W — Wait List

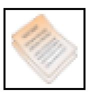
- If you open a booking that uses unauthorized equipment, a warning message displays. Selecting a procedure can display the message. Changing the facility in a booking can also display the message, because changing the facility allows equipment to remain in the booking even though the equipment is not authorized for the facility. If this occurs, click **Refresh** to update the equipment or manually make an adjustment. You can remove unauthorized equipment and add authorized equipment, but it is not possible to add other unauthorized equipment. A booking can be filed with unauthorized equipment remaining.
- If in the Manage Bookings screen, you selected only **WaitList** from the booking options, and the **Booking Request Received Date** fields in the bookings have values, the bookings are listed according to those values with the oldest first.
- If the Surgical Patient Registry is implemented, the Manage Bookings screen has a different arrangement of columns, whose values are explained in *Fields* on page 54
    - The **SU/PR/TD Times** column shows the Waitlist Priority value.
    - The **Surgeon's Priority** column is to the right of the **SU/PR/TD Times** column.
    - The **Assessment Score** column is to the right of the **Surgeon's Priority** column.
- The **Booking #** displays the URN and by default, is the last search results column. If there are any pre-existing settings configured, the existing settings are displayed and additional changes must be made manually.

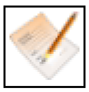
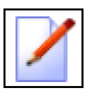
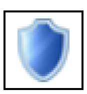
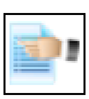
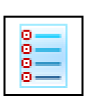
Manage Booking Buttons

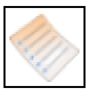
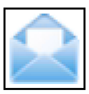
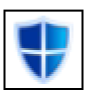
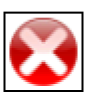
Click the buttons on the Manage Bookings Option screen to perform the corresponding commands:

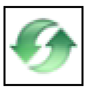
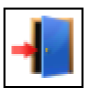
Manage Booking Buttons

Button	Description
Edit Patient Data 	Brings up the **Patient** tab of the OR Booking screen so you can edit the data in the user-defined forms. See *Forms Mode* on page 60.

Button	Description
Global Fld Update 	Enables you to update the same user-defined fields in multiple records. See *Global Field Update* on page 102. **Note:** If a Surgeon on any of the selected Bookings is set to View Only access on the Physician Office Link tab in Security Manager, a message displays indicating that access is restricted and some bookings will not be updated.
Copy Booking 	Brings up the booking screen with a copy of the selected booking. You can then change any of the original booking's parameters and save it to a different time slot, creating another booking like the original with only the parameters you changed being different. Only the PAT data is not copied to the new booking. The original booking remains unchanged. **Note:** When you copy a booking which is using inactive entries in any of the following fields on the booking tab page: surgeon, procedure, site, laterality, Assistant 1, Assistant 2, Rooms, Waitlist Priority, Equipment/TPK, Resources, Anesthesiologist or on the Patient tab page: Patient Bed type, a notification opens that inform you that you are copying a booking that has inactive entries. The inactive entries remain on the copied case record. **Note:** If a Surgeon on the Booking is set to View Only access on the Physician Office Link tab in Security Manager, a message displays indicating that access is restricted and the booking cannot be copied.
PAT Booking 	Enter or edit PAT bookings for the highlighted case. See *Pre-Admit Tests on page 85*.

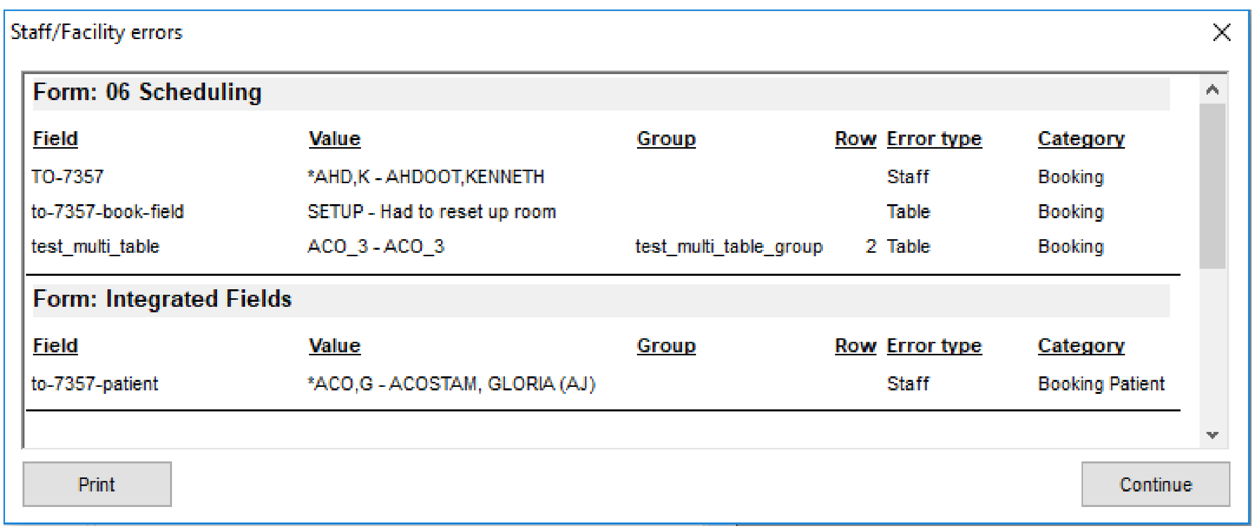
Button	Description
Move/Edit Bkng 	Brings up the booking on the OR Booking screen for editing the booking, PAT, or patient data. You can also double-click on any entry on the list to edit the booking, PAT, or patient data. See *Booking Tab: Introduction* on page 40. There is an interaction with frozen picklists explained in another topic, *Fields* on page 42. **Note:** If a Surgeon on the Booking is set to View Only access on the Physician Office Link tab in Security Manager, a message displays indicating that access is restricted and offers the option to view the booking.
Initiate Case Record 	Enables you to create a case record for the selected operation by bringing up the **Patient** tab of the Case Record screen with all of the bookings for patients that match the search criteria. If multiple bookings for the same patient are found, you can start the Case Record by matching the patient's name, unit number, or account number, if available, of the selected record. . See *Patient Tab: Search Details* on page 150.
View Audit Trail 	Shows a complete history of the highlighted booking. The audit trail records every time the booking, and its associated picklist, was viewed, modified or printed.
View Booking 	Brings up a read-only booking summary containing all procedure and patient information. See *View Booking Data* on page 70.
Edit Frozen Picklist 	Allows you to make changes to the items on a case's picklist. These changes appear on the printed list and on the case record, but they are not permanent. They do not affect the preference card or the permanent picklist. See *Edit a Frozen Picklist* on page 103.
Picklist 	Prints picklists by case cart. See *Picklists by Case Cart* on page 243.

Button	Description
Worksheet 	Prints worksheets by booking. You have the options of including Stock Images and/or Tray/Pack/Kit Instruction Notes on the worksheet. See *Worksheets* on page 254.
Print Schedules 	Prints booking schedules or external reports. See *Reports* on page 257.
Print Booking 	Prints booking sheets. See *Print a Booking Sheet* on page 105.
Mail Merge 	Takes you to a module that allows you to print letters, envelopes, and labels for selected cases. For more information on the preceding topic, see the following chapter in the *OR Manager Configuration Guide*: Mail Merge.
Field Level Audit Trail 	Shows all changes made to fields within the booking. See *Booking Field Level Audit Trails* on page 107.
Cancel 	Enables you to cancel bookings or change cancellation reasons for selected bookings. **Note:** If a Surgeon on any of the selected Bookings is set to View Only access on the Physician Office Link tab in Security Manager, a message displays indicating that access is restricted and some bookings will not be updated. See *Cancellation Options* on page 106.

Button	Description
Re-book 	Returns canceled bookings to Active status. **Note:** If a Surgeon on any of the selected Bookings is set to View Only access on the Physician Office Link tab in Security Manager, a message displays indicating that access is restricted and some bookings will not be updated.
Refresh 	Updates the Manage Bookings Options screen with the most current information from the database.
Close 	Closes the Manage Booking Options screen.

Multi-facility sites

At multi-facility sites, depending on the configuration you may be presented with an error information window such as the following when opening a booking:


Staff/Facility errors

Form: 06 Scheduling

Field	Value	Group	Row	Error type	Category
TO-7357	*AHD,K - AHDOOT,KENNETH			Staff	Booking
to-7357-book-field	SETUP - Had to reset up room			Table	Booking
test_multi_table	ACO_3 - ACO_3	test_multi_table_group	2	Table	Booking

Form: Integrated Fields

Field	Value	Group	Row	Error type	Category
to-7357-patient	*ACO,G - ACOSTAM, GLORIA (AJ)			Staff	Booking Patient

Print
Continue

This can happen if your hospital has changed the database configuration of one or more dropdown list entries used in the booking such that they are no longer available for the booking's facility. For example, the booking may include an item of equipment that is no longer available in the facility.

Click **Print** to print the error information and continue working with the booking. If you later save the booking you will be shown the window again and it will include a **Fix** button. Click **Fix** to return to the previous screen and change the dropdown selections for the invalid entries before saving again or click **Continue** to save the booking with the invalid entries.

Global Field Update

OR Manager allows you to update user-defined fields in all or some of the bookings simultaneously. To change the anesthesia type for a group of bookings, use the global update feature.

1. Select the bookings you want to update and click **Global Field Update**. The Which Bookings? screen opens. Select an option to specify the bookings to update and click **OK**.

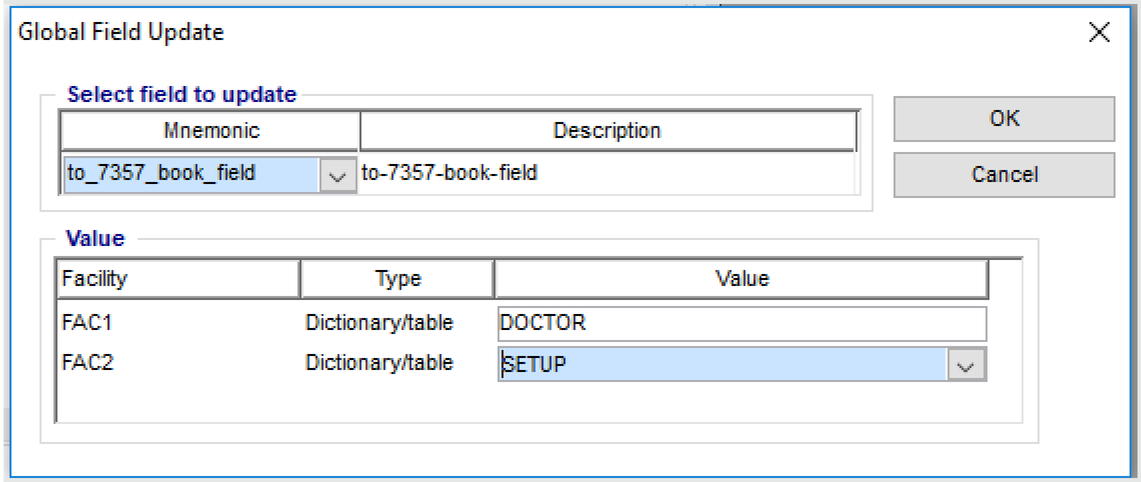
   Note: If a Surgeon on any of the selected Bookings is set to View Only access on the Physician Office Link tab in Security Manager, a message displays indicating that access is restricted and some bookings will not be updated.

Option	Description
Current	Only the highlighted patient.
Marked	All of the records with a check mark in the left column of the Options screen.
All	All of the records on the Options screen.

2. Under **Select Field to Update**, select the user-defined field you want to update. The field’s Type (i.e. Dictionary, Table, Free Text) appears in the **Type** column below.
3. Enter the new **Value.** If it is a dictionary or table, there is a drop-down menu listing the entries.

   The new value automatically enters into this field on all forms from the cases you selected.

Note: At multi-facility sites, depending on the configuration the “Value” pane may show a row for each facility from the selected bookings. (If all selected bookings are from the same facility, there will just be one row.)



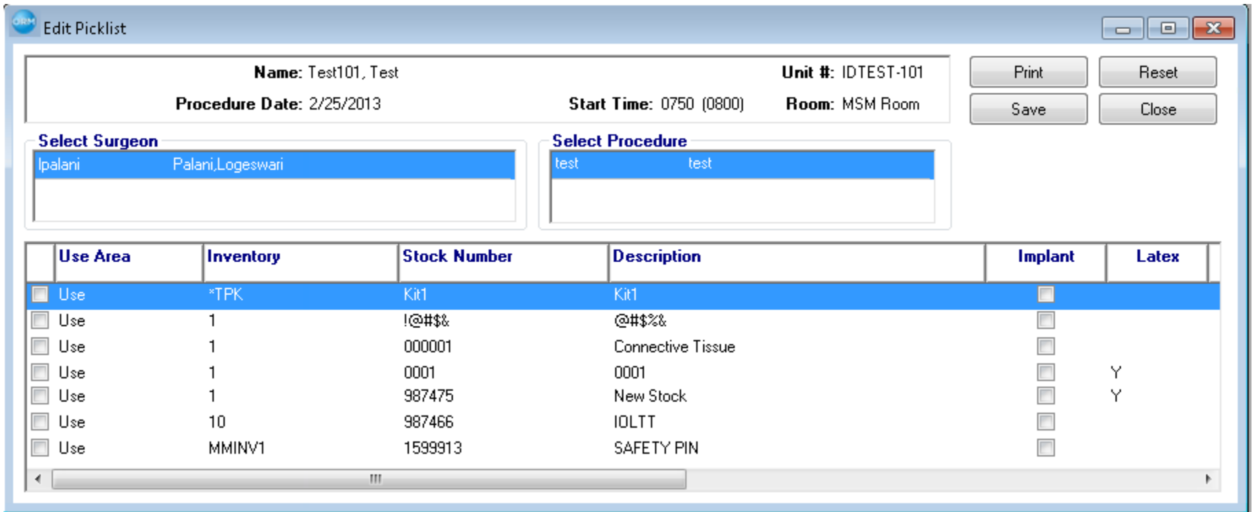
For each row that you want to update, select a new value in the **Value** column.

Edit a Frozen Picklist

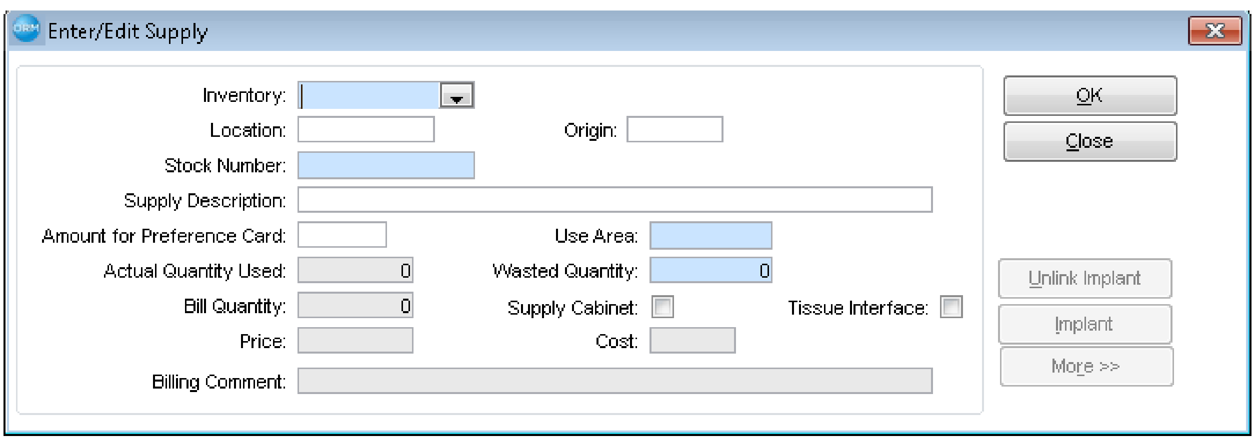
The frozen picklist feature enables you to modify the contents of a picklist for one surgery without changing the preference card or picklist it is based on. For all other procedures, the picklist and preference card remain the same. Be aware that quantities over one may appear as repeated lines in the Case Record, depending on administrative settings. Note also that updates to **Hold Qty** from Edit Frozen Picklist flow to the Case Record Exception Noting only if the case record has not yet been initiated.

Edit a Frozen Picklist

1. Highlight the booking attached to the picklist you want to edit, and click **Edit Froz Picklist**. The Edit Picklist screen appears. Unauthorized **Tray/pack/kits** are listed together in bold red characters. You can drag the boundaries of the column headings that show data for items in the picklist with the left-hand mouse button to make changes in column width that are saved when you leave the screen.



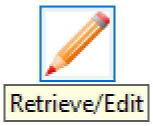
2. Highlight the item you want to edit, then right-click. A menu appears with the following options: **Add Item**, **Add Generic Item**, **Add Tray/Pack/Kit**, **Delete Item**, **Modify Quantity**, **Reset Picklist**, **Delete Marked Item**. Only authorized tray/pack/kits appear in the list. A message warns against the addition of unauthorized Equipment. Resetting the Picklist makes the information revert to what is stored in the preference cards. Messages distinguish between three cases of linking that make a tray/pack/kit unacceptable: supplies not associated with facility, supplies with inventories not associated with assigned facility, and tray/pack/kit not associated with assigned facility.
3. Select a menu item. Depending on your menu selection, you will see a variation of the following screen:



4. Make the additions, modifications, etc., then click **OK**.
5. Click **Save** to save your new picklist. This edited list is on the case record.
6. Click **Print**.

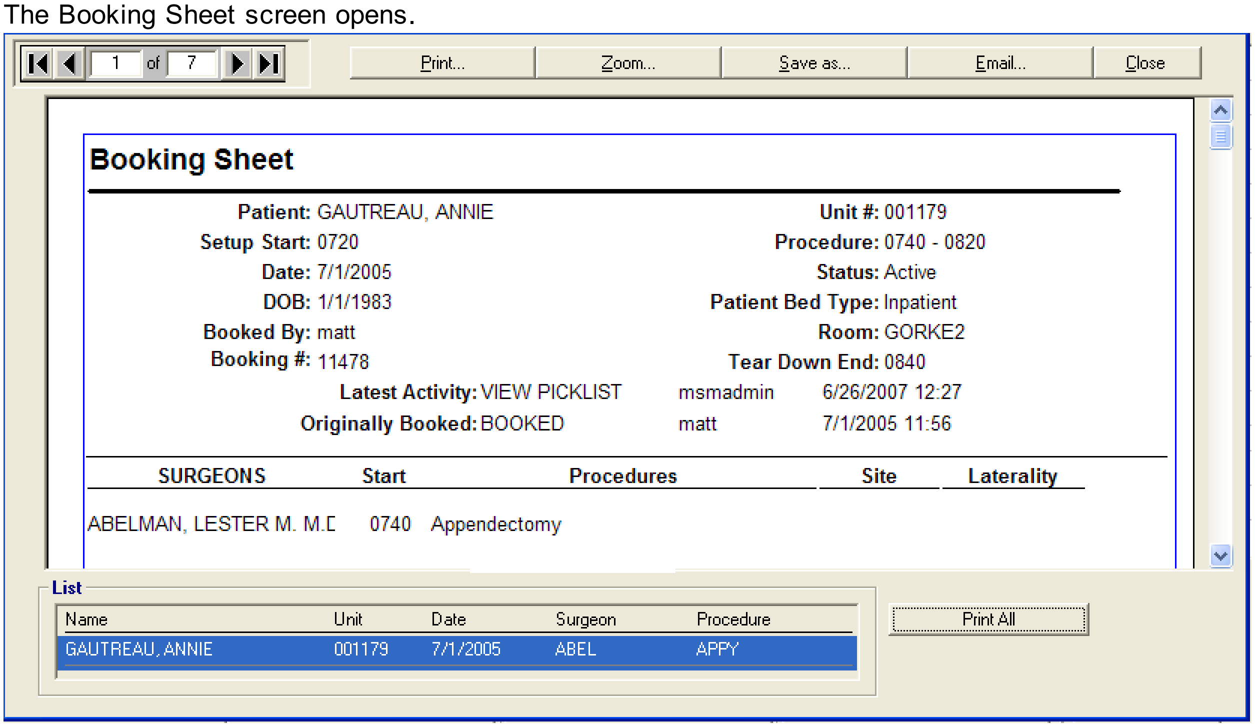
Print a Booking Sheet

1. Select **Tools > Manage Bookings**.
2. Choose your Selection Options, then click the **Retrieve/Edit** button.



   The Manage Bookings Options screen appears.
3. Check the cases for which you want to print booking sheets.
4. Click **Print Booking**. A screen comes up to enable you to select printing options.
5. Select the patients whose records are to be merged:
   - **Current**: Only the highlighted patient.
   - **Marked**: All of the records with a check mark in the left column of the Options screen.
   - **All**: All of the records on the Options screen.
6. If you are using a user-defined form for your booking sheet, select **Yes**. Otherwise, choose **No**.
7. To print a **Header on Each Pg.** select **Yes**. Otherwise, select **No**.
8. Click **OK**.

   The Booking Sheet screen opens.



9. (optional) Click on booking sheets in the List box to preview them.
10. To print the booking sheet in the preview screen, click **Print...**
    To print all of the booking sheets, click **Print All**.

> **Note: Print All** does not allow page range selection. Use **Print** (at the top of the screen) to use the page range option.

Cancellation Options

Cancel is used to cancel bookings and modify cancellation reasons and comments for bookings that have already been canceled.

You can choose multiple bookings for cancellation processing. For bookings that are already canceled, click **Cancel** to change the cancel reason and/or to edit the cancellation comments.

1. Select the bookings you want to cancel and click **Cancel**. At **Which Bookings?** select an option to specify the bookings edit and click **OK**.

Option	Description
Current	Only the highlighted patient.
Marked	All of the records with a check mark in the left column of the Options screen.
All	All of the records on the Options screen.

> **Note:** If a Surgeon on any of the selected Bookings is set to View Only access on the Physician Office Link tab in Security Manager, a message displays indicating that access is restricted and some bookings will not be updated.

2. You must assign a reason for cancellation. This reason will apply to all of the bookings canceled at this time
3. In addition to the cancel reason, you may be asked to supply a comment for each cancellation, depending on the setting of parameter *require_cancellation_comment:*
   You have the opportunity to enter a different comment for each booking you are canceling.

> **Note:** When the booking primary procedure/surgeon is setup to send a booking follow-up email and the trigger is set to prompted, the system will prompt the user before sending the email. See the *OR Manager Configuration Guide* Booking Auto Email Settings for information on booking change actions that cause a follow-up booking email to be sent.

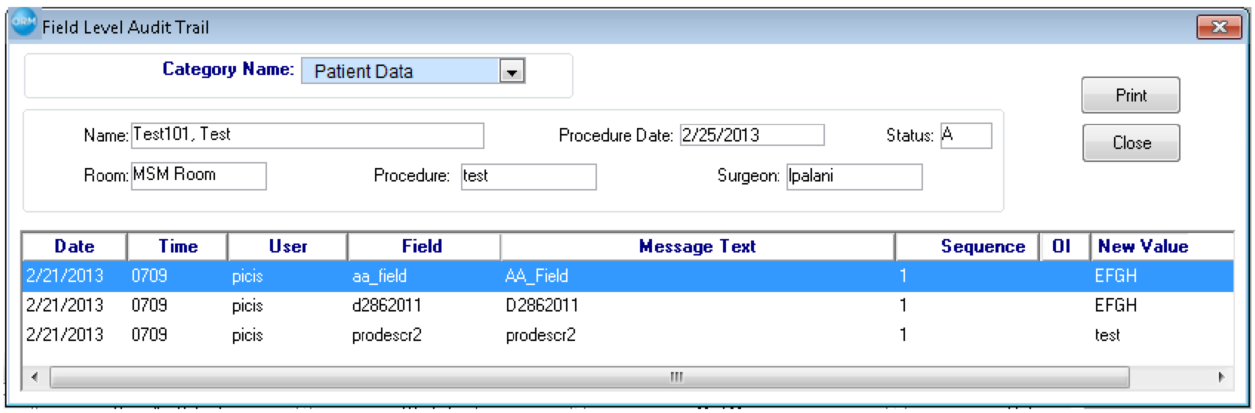
> **Note:** The list of cancellation reasons comes from the Cancel Reason (CANREAS) standard table.

Booking Field Level Audit Trails

The Field Level Audit Trail lists changes to any data field in the booking since it was created. This list includes the original value, new values, who made the changes, and dates the changes were made.

Click **Field Level Audit Trail** to open the Field Level Audit Trail screen. There are two audit trail options:

- Booking Data.
- Patient Data.



In addition, right-clicking on a field in a column on the Field Level Audit Trail screen opens a menu:

- Select **Filter** to see only entries containing the same data as the field you selected.
- Selecting **Undo Filter** removes all filters and displays audit trails for all fields in the booking.

Make a selection in **Category Name** to select a form category to refine the list of changes that are displayed. When this screen is opened for a single field, as is the case when you click on the audit icon associated with the field, you cannot make a selection in **Category Name**.

You can print the Field Level Audit Trail by clicking **Print** in the upper right-hand corner.

If a patient has an allergy and reaction that is other vendor deleted, they are sorted to the bottom. This sorting is reflected in the field level audit trail as a change by the OR Manager application, "SYS_ORM."

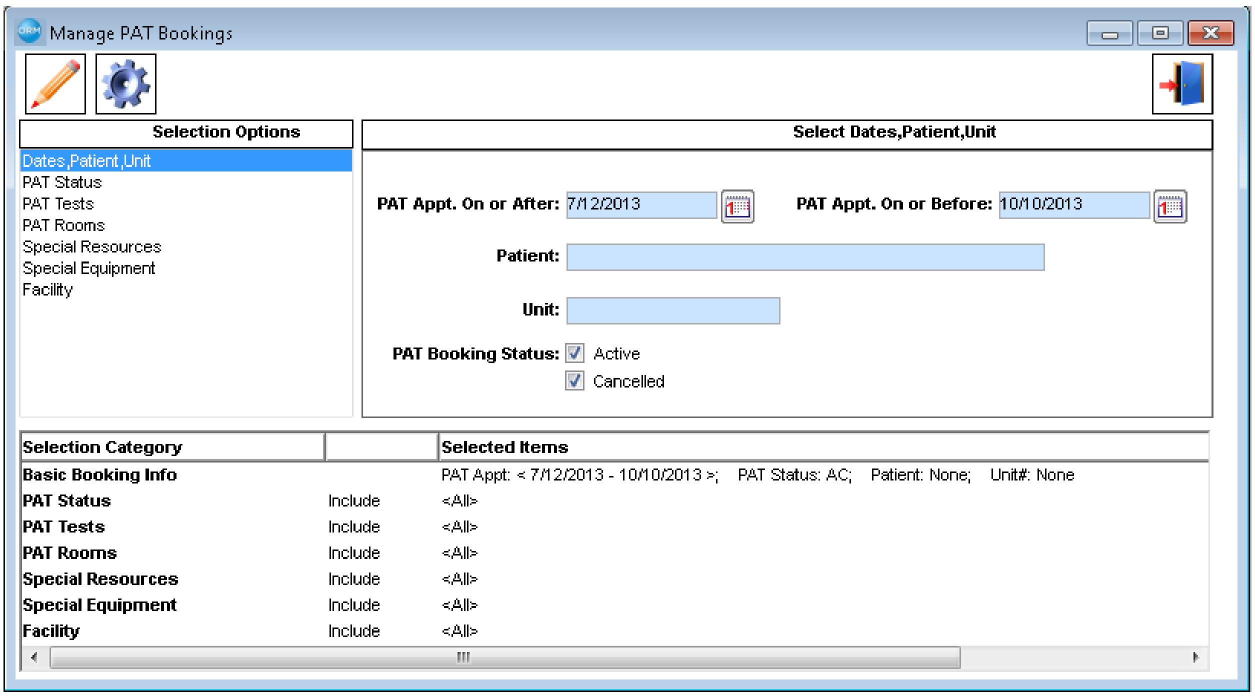
The field level audit trail tracks changes in the value of the field that specifies VIP status for a record.

Managing Pre-Admit Bookings

Menu:Tools > Manage Pre-Admit Bookings

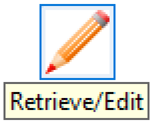
You use the OR Manager Manage PAT bookings screen to manage PATs that have already been booked. You cannot book a new PAT from this screen. Use the OR Booking screen, the Manage Bookings screen, or the OR Schedule Viewer instead.

Below is an example of a Manage PAT bookings screen.



Select PAT Bookings

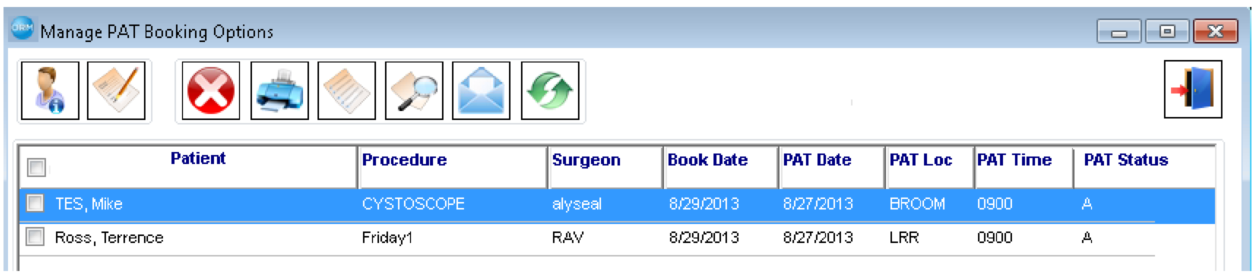
1. If you are not already familiar with using manage screens, review *Manage Screen Searches on page 92*.
2. Enter your search criteria. Your selections appear under **Selected Items** at the bottom of the screen.
3. If you are using Custom Field Select, click **Custom Field Select** and enter your custom field information.
4. Click the **Retrieve/Edit** button.



5. The Manage PAT Booking Options screen appears, showing the PAT bookings that meet your criteria.

Manage PAT Booking Options

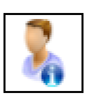
The Manage PAT Booking Options screen shows the bookings you specified on the Manage PAT booking screen.

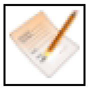
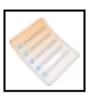
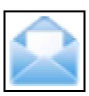
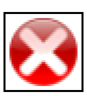
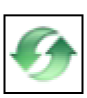


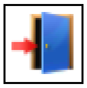
Select a patient and use the buttons described next to accomplish your task.

Manage PAT Booking Buttons

Click the buttons on the Manage PAT Booking Options screen to perform the corresponding commands:

Button	Description
Edit Patient Booking	Opens the PAT booking and allows the user to view and/or edit Tests, Equipment, Resource, Status, Date, Time, Duration, Current Status, Comments and Dr. Comments in the original PAT booking.
Edit Patient Data 	Brings up the **Patient** tab of the OR Booking screen so you can edit the information in the user-defined forms. *Patient Tab: Forms on page 67*.

Button	Description
Move/Edit Booking 	Brings up the booking on the **Pre-Admit Test** tab of the PAT booking screen. You can then edit the booking. Double-clicking on an entry in the list does the same thing. *Pre-Admit Test Tab* on page 88.
View Booking 	Brings up a read-only booking summary containing all procedure and patient information. *View Booking Data* on page 70
Print Booking 	Prints PAT Booking Sheets. *Print a Booking Sheet* on page 105.
Print Schedules 	Prints PAT Booking Schedules or External Reports. *Reports* on page 257.
Mail Merge 	Takes you to a module that allows you to print letters, envelopes and labels for selected PAT bookings. For more information on the preceding topic, see the following chapter in the *OR Manager Configuration Guide: Mail Merge*.
Cancel 	Cancels selected PAT bookings (after confirmation).
Mark All	Selects (checks) all bookings on the screen.
Unmark All	De-selects (removes checks from) all bookings.
Refresh 	Updates the Manage Bookings Options screen with the most current information from the database.

Button	Description
Close 	Closes the Manage PAT Booking Options screen.

Schedule Viewer

Menu:Tools > Schedule Viewer

OR Manager’s Schedule Viewer shows the Booking Grid view of the OR or PAT schedule for the dates and rooms you choose, then allows you to make scheduling changes quickly and easily.

Important Schedule Viewer tasks are explained in the following sections:

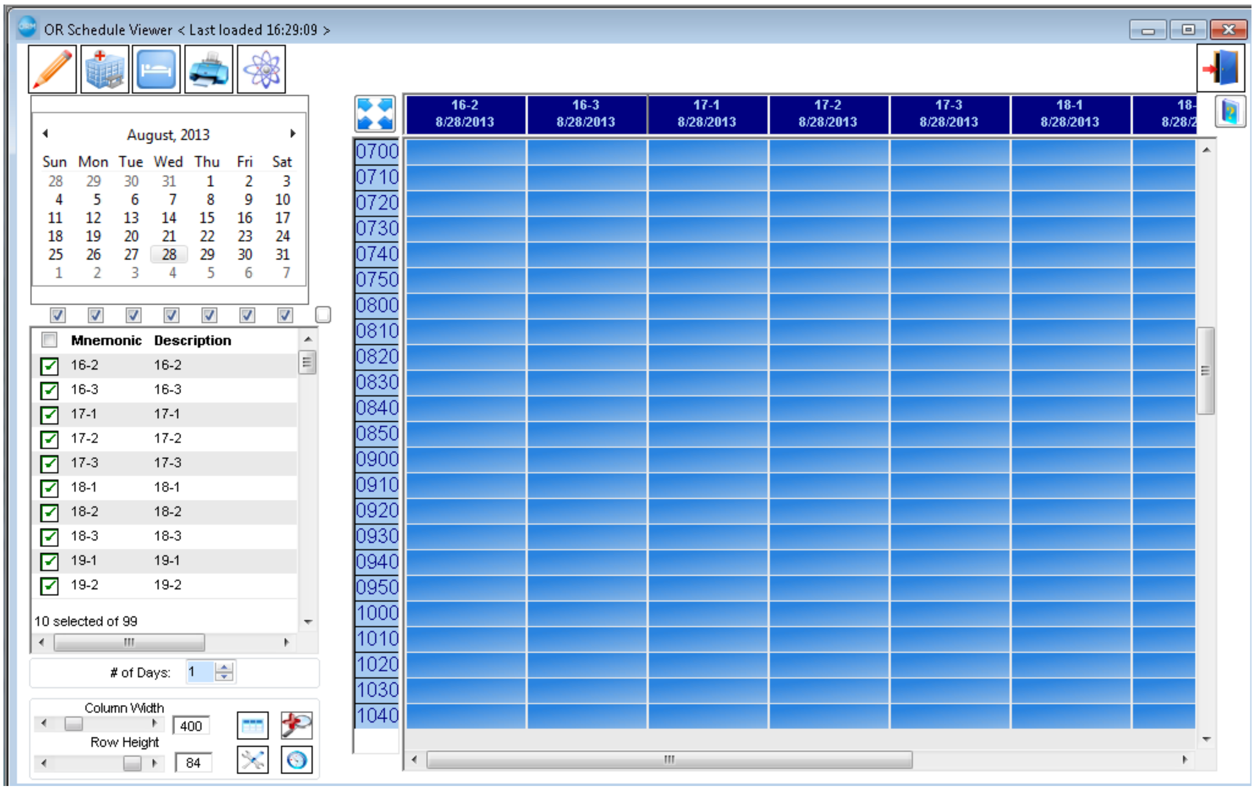
- *Select Dates, Days, and Rooms*
- *Work with a Booking on the Scheduling Grid*
- *Rearrange a Day*
- *Move a Single Booking*
- *Move Several Bookings*
- *Move Bookings to the Queue*
- *View or Sort the Booking Queue*

Select Screen

When you first select the Schedule Viewer, you are asked which type of schedule to view.

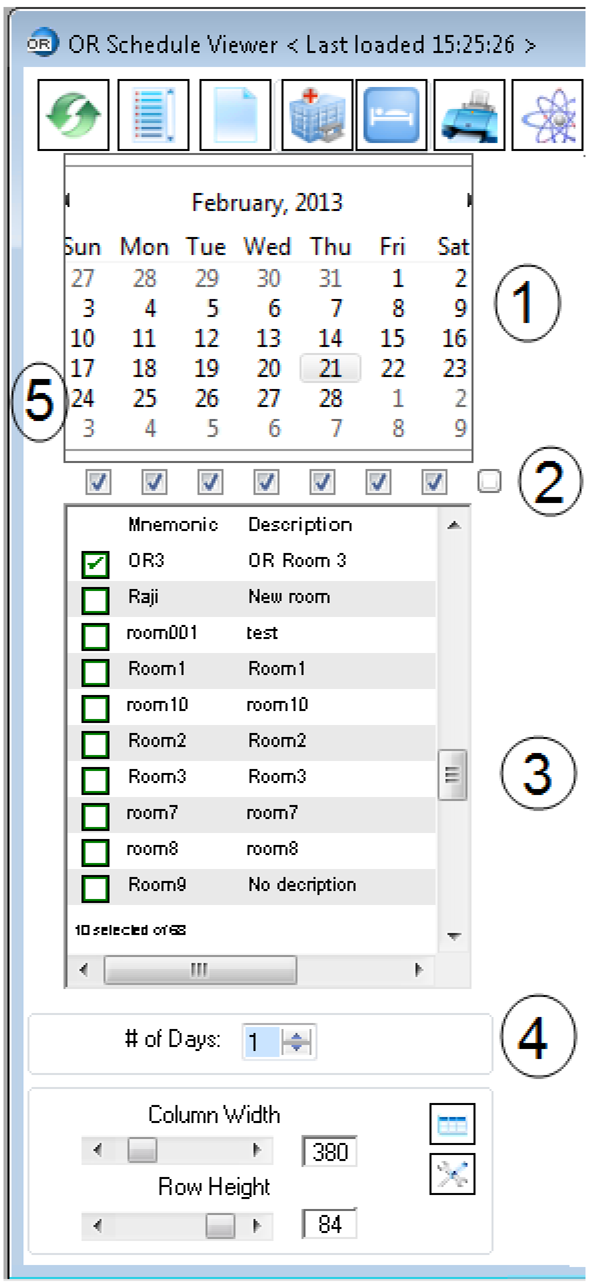
PAT Schedule Viewer Screen

This is an example of a PAT Schedule Viewer screen:



Select Dates, Days, and Rooms

The numbers on the left-hand side of the following graphic correspond to the number of the step performed.



1. Choose a month and year in the two boxes.
2. Check the days of the week you want to view.
3. Select the room schedules you want to view. See *Room Selection Methods* on the next page for other methods.

4. Select the number of days you want to view. In the scenario shown in the following picture, three room schedules will be displayed for four days: Thursday the 20th, Saturday the 23rd, Monday the 25th, and Wednesday the 27th. If the user chose 5 days, the schedules for Thursday the 28th would also be displayed.
5. Click to select the starting date for the search.
6. Click **Retrieve**. (You can also double-click the starting date to begin the search process.)

   The schedules that meet the selected criteria are displayed.

Room Selection Methods

Room selections are indicated by a check mark beside the room name on the list. You have several options for selecting rooms:

- Select the box to the left of the Room Mnemonic heading to select or clear all the rooms.
- Click **Facility** to select all of the rooms in a single facility.

  Opens a screen to select a facility. After you select a facility, all of the rooms in that facility are selected.
- Click **Room Group** to select all of the rooms in a group from the Room/Surgeon/Procedure Groups dictionary.

  Opens a screen to select a room group. After you select a room group, all of the rooms in that group are selected.
- Select the box to the left of each room to select them individually.

PAT Bookings in the Schedule Viewer

Menu:Tools > Schedule Viewer

1. When the Select Locations screen opens, select **Pre-Admit Testing.**

   The PAT schedule viewer opens.
2. Select PAT rooms and today's date and click **Retrieve/Edit**
3. Double-click on a PAT booking to open and then edit and/or view the following in the original PAT booking:

- Tests
- Equipment
- Resource
- Status
- Date
- Time
- Duration

- Current Status
- Comments
- Dr. Comments

PAT Booking edits are sent back to the PAT booking and PAT schedule viewer. The best way to accomplish this is through the actual PAT booking.

Note: If a PAT booking is canceled or moved to a future date the PAT booking will not display in the screen.

Work with a Booking on the Scheduling Grid

- Right-click on the room and time you want to work with to open the Scheduling Grid Menu.

Note: Depending on where the arrow is when you click, some of the options on the menu may not be available.

Scheduling Grid Menu

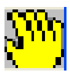
The following table explains the items on the Scheduling Grid Menu.

Scheduling Grid Menu 1 of 5

Item	Description
New Booking	(*OR schedules only*) Displays an OR Booking screen to enable you to book an operation. **Note:** If the user's Physician Office Link Surgeons are all set to **View Only** in Security Manager, a message displays indicating that the user is unable to enter a new booking.
New Reservation	(*OR schedules only*) Displays an OR Booking screen to enable you to enter a reservation. **Note:** If the user's Physician Office Link Surgeons are all set to **View Only** in Security Manager, a message displays indicating that the user is unable to enter a new reservation.

Item	Description
Edit Booking	(*OR schedules only*) Shows the OR Booking screen with selected booking information filled in. You can schedule a PAT from this OR Booking screen. See *Booking Tab: Introduction* on page 40. There is an interaction with frozen picklists explained in *Fields* on page 42. **Note:** If a Surgeon on the Booking is set to View Only access on the Physician Office Link tab in Security Manager, a message displays indicating that access is restricted and the booking cannot be edited.
View Booking	Displays a read-only Booking Summary, including procedure and patient data. See *View Booking Data* on page 70.
Copy Booking	Brings up the booking screen with a copy of the selected booking. You can then change any of the original booking's parameters and save it to a different time slot, creating another booking like the original with only the parameters you changed being different. Only the PAT data is not copied to the new booking. The original booking remains unchanged. **Note:** If a Surgeon on the Booking is set to View Only access on the Physician Office Link tab in Security Manager, a message displays indicating that access is restricted and the booking cannot be copied.
Cancel Booking	(*OR schedules only*) Cancels the selected booking. You must select a Cancel Reason and have the option to enter a comment. **Note:** If a Surgeon on the Booking is set to View Only access on the Physician Office Link tab in Security Manager, a message displays indicating that access is restricted and the booking cannot be canceled.
Release to Request	Moves a reservation (it is only active for reservations) off the schedule viewer by transforming it into a request.

Scheduling Grid Menu Continued 2 of 5

Item	Description
Pick Up Booking	Enables you to pick up a the booking you selected (with a right-click). A yellow hand icon appears at the bottom of the screen to indicate that you have a booking that has been picked up. You cannot have more than one booking in the pick up queue at the same time.  **Note:** If a Surgeon on the Booking is set to View Only access on the Physician Office Link tab in Security Manager, a message displays indicating that access is restricted and the booking cannot be picked up.
Drop Booking	Brings up the booking screen with the room and time you right-clicked as the default and the booking options defaulted to Book-Direct. You can change any of the defaults, then click the **Go** button to re-book as you would any other booking.
Initiate Case Record	(*OR schedules only*) Enables you to create a case record for the selected operation by bringing up the **Patient** tab of the Case Record screen with all of the bookings for patients that match the search criteria. You have a choice of matching on the patient's name, unit number, or account number, if available, of the selected record. From there, you can create a case record that is automatically linked to its booking. See *Patient Tab: Search Details* on page 150.
Pick Rooms for Display	Brings up a screen to enable you to change what rooms are displayed on the grid. See *Pick Rooms for Display Option* on page 80

Scheduling Grid Menu Continued 3 of 5

Item	Description
Pick Rooms for Display	Brings up a screen to enable you to change what rooms are displayed on the grid. See *Pick Rooms for Display Option* on page 80.
Select Display Fields	Brings up a screen to enable you to change the fields that are displayed on the grid. See *Select Display Fields* on page 81.
Start Timer	Starts the Timer, which is used to refresh the OR Schedule Viewer screen. The screen refreshes when the timer runs out, and then resets the timer to countdown to the next refresh. The timer can also be started and stopped by clicking the timer icon located in the bottom right corner of the OR Viewer screen.  An X through the icon indicates that the timer is not active. 

Scheduling Grid Menu Continued 4 of 5

Item	Description
Select Timer Interval	Click to set the timer. Set to how often (in seconds) you want OR Manager to check for new bookings and refresh the Schedule Viewer screen. Select **Start timer when screen first opens** to have the timer start automatically every time you open the Scheduling Grid.
View Comment	Available in time slots with a double arrow (>>), indicating that the slot has a comment to display.
Enter/Edit Comment	Available in any slot or range of slots. Use this selection to enter new comments or edit existing ones.
Delete Comment	Available in time slots with a double arrow (>>), indicating that the slot has a comment. Use this to delete the comment.

Scheduling Grid Menu Continued 5 of 5

Item	Description
Block Enter/Edit	Opens the room Scheduling Detail screen to enable you to add, change, or delete block times for the room and day the cursor is on. See the the *OR Manager Configuration Guide*: Booking Dictionary Schedules.
Release Block	Select to release a block time for general booking in open time. OR Manager confirms the release with the block start and end in parenthesis and block title in hard brackets.

Expand/Contract Feature

After retrieving the rooms you want to view, you can expand the grid to take up the entire screen by clicking on the white icon at the top of the time column:

To collapse the grid back to its original size, click on the gray icon at the top of the time column:

Expand Grid Feature

You can use the magnifying glass icon () at the bottom of the screen to temporarily double the amount of time shown for each block on the grid (10 minutes to 20 minutes, 15 minutes to 30 minutes, etc.)

This feature allows you to see much more of the day on the screen at a time. It is view only; there is no effect on the actual times and you cannot edit the schedule in the expanded grid.

Note: Schedule items that occupy less than a full block in the expanded grid may not display properly.

To reset the view back to the standard grid, click the magnifying glass icon again.

Surgeon Filtering for Schedule Viewer

When a booking is created in a multiple facility environment and the restrict_surgeon_lookup_by_ facility application parameter is enabled, validation of the surgeon and anesthesiologist facility access will occur in Schedule Viewer when the **Drop Booking** operation occurs.

The system will first verify that all surgeons and anesthesiologists on the booking have access to the facility associated with the new room. If any of the surgeons or anesthesiologists that are assigned to the booking are not authorized for the new room then a message is displayed showing which is not authorized and the move process is aborted.

Rearrange a Day

Menu:Tools > Rearrange a Day

The Rearrange a Day feature allows you to view, and quickly change, the OR’s schedule for a selected day.

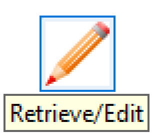
The Rearrange a Day screen shows a Booking Grid view of a day’s OR schedule. You can move bookings on the grid to different times and rooms, and you can put bookings in a queue to change their duration or to store them while you move other bookings around the grid.

If the movedbooking_creditblock parameter is active, and you are rescheduling a case out of block, the Credit Block Prompt screen appears to facilitate manual block crediting.

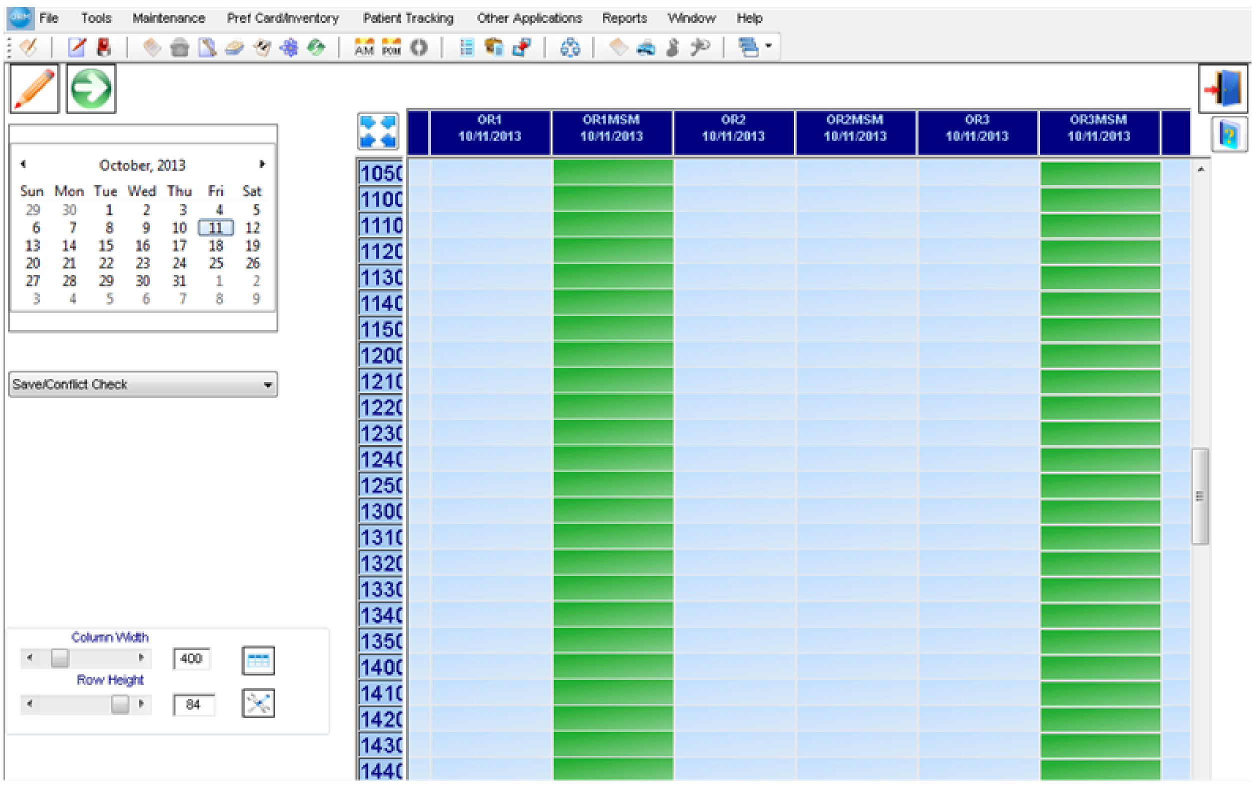
Best Practice: While you use the Rearrange a Day Feature, keep in mind that other users are locked out of the day. In a multi-facility site, this effect can be avoided for facilities other than your own by an administrator's setting of the application parameter rearrange_conflict_load_end to Y.

Rearrange a Day

1. Select **Tools > Rearrange a Day**.
2. Specify a facility, if necessary. The Rearrange a Day screen appears.
3. Select a date from the calendar, then click the **Retrieve/Edit** button.



The Booking Grid, showing the OR schedule for the specified day, appears:



The Expand/Contract feature on this screen works the same way as on other booking grids. See *Expand/Contract Feature* on page 120.

4. Right-click on an entry in the Booking Grid that you want to move, delete, etc.

   The right-click menu appears. This menu has all the commands you need to rearrange a day.

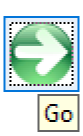
5. Select the menu items you need to accomplish your tasks. The commands available vary, depending on where you click.

   See the appropriate sections in this chapter for complete instructions on using the right-click menu.

6. In the **Retrieve** box, select a method of conflict checking.

   - Select **Save/Conflict Check** to check conflicts for only the bookings that have been moved.
   - Select**Conflict Check All** to check scheduling conflicts for all bookings for the day. Conflicts are reported in a list like the following.

7. Click the **Go** button to initiate conflict checking. See *Conflict Checking* on the facing page for a discussion of what happens when conflicts are found.



8. Click **Close** to close the screen.

   If conflicts for moved bookings have not been resolved, a warning appears that the changes will not be saved.

   If no conflicts remain unresolved or no bookings were moved, the Rearrange a Day screen closes.

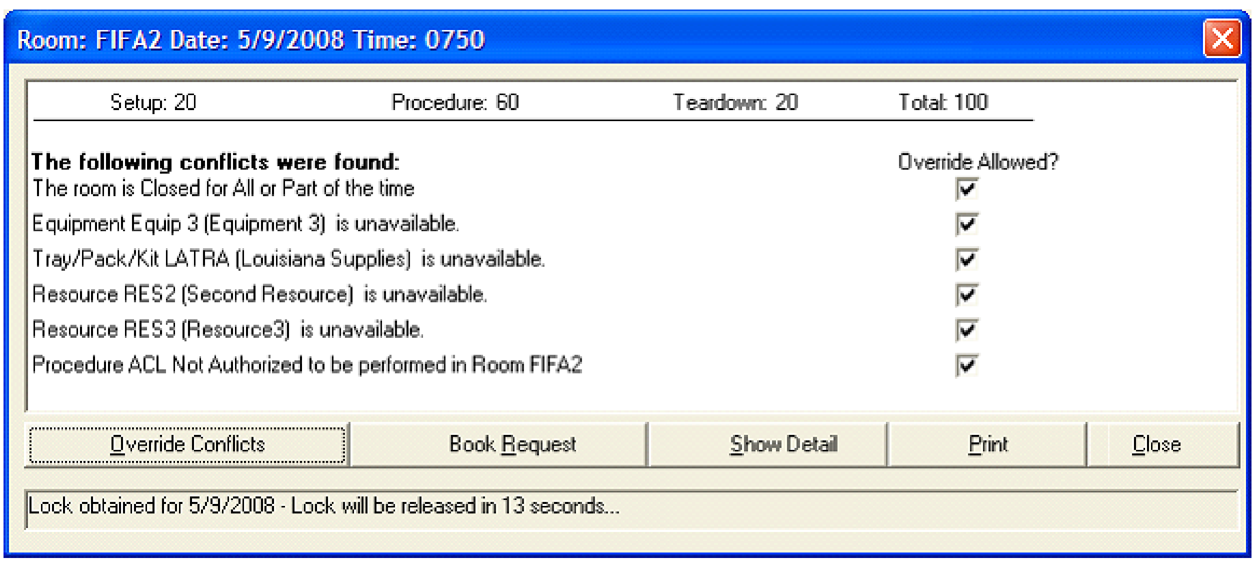
> **Note:** When the booking primary procedure/surgeon is setup to send a booking follow-up email and the trigger is set to prompted, the system will prompt the user before sending the email. See the *OR Manager Configuration Guide Booking* Auto Email Settings for information on booking change actions that cause a follow-up booking email to be sent.

Conflict Checking

You have two options for conflict checking: **Save/Conflict Check** and **Conflict Check All**. **Save/Conflict Check** is mandatory after moving bookings. You must use it in order to save changes.

Save/Conflict Check looks for conflicts involving only the bookings that have been moved.

If conflicts are found, you see the following screen. It displays the mnemonic as well as up to a fifty-character description beside the mnemonic, on screen and on printouts for Equipment. The description appears in parentheses after the mnemonic and is populated from the relevant dictionary.

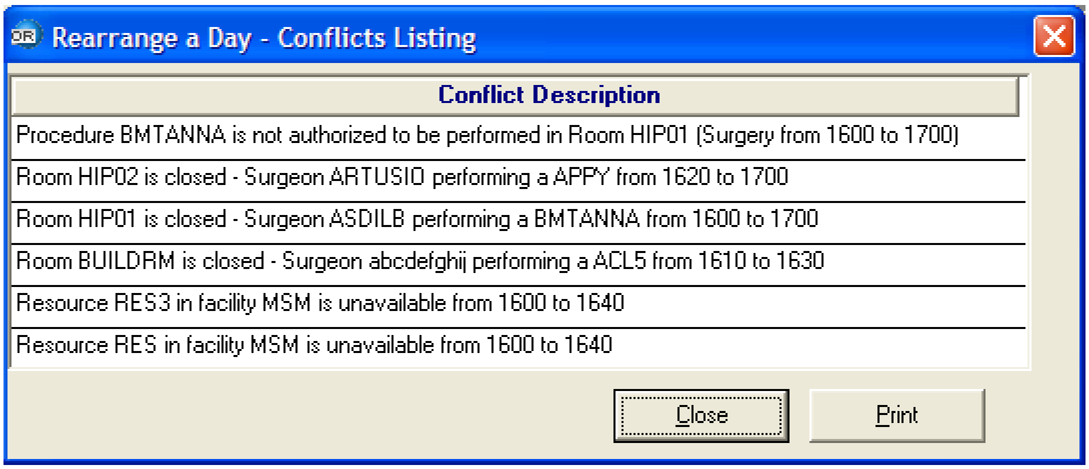


You have two options:

- You can override the conflicts, if you are allowed to, and save the new schedule.
- Do not override the conflicts or save the new schedule. This option gives you the opportunity to go back and move the offending bookings to eliminate the conflicts. The option you chose is executed when you click **OK**.

- If no conflicts are found, your changes are saved.

Conflict Check All checks all of the day's bookings for conflicts. Its results are merely advisory; you cannot override or otherwise resolve conflicts through this screen:



See the *OR Manager Configuration Guide*: Preference Card Supporting Dictionaries.

Move a Single Booking

1. Place the cursor on the booking, right click, and then select **Pick Up Booking** from the right-click menu.

   The booking's information appears on the left side of the screen. It remains here until you drop the booking.
2. Click where (on the grid) you want to move the booking, and select **Drop Booking** from the right-click menu.

   The booking appears in its new slot.

Note: If a Surgeon on the Booking is set to View Only access on the Physician Office Link tab in Security Manager, a message displays indicating that access is restricted and the booking cannot be picked up.

Move Several Bookings

1. Place the cursor on the room, right-click and select **Move Several Bookings** from the right-click menu.
2. Enter the time range of the bookings you want to move. You cannot cut a booking in two. If a procedure is scheduled from 7:00-8:00 and you enter 7:30 as the end time, the entire booking is moved.
3. Enter the room to which you are moving the booking.
4. Select a Method:

- **End of Last Booking**: Moves bookings to the slot immediately after the end of the last booking in the room.
- **Overlay Booking**: Moves bookings to the first booking in the room, and pushes the present bookings down.
- **Swap Rooms**: Switches all the bookings in the two rooms.

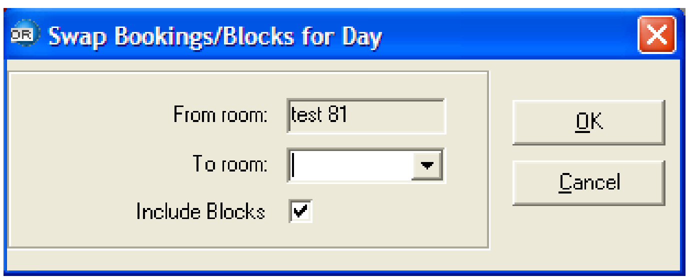
5. Click **OK**.

Note: If a Surgeon on any of the selected Bookings is set to View Only access on the Physician Office Link tab in Security Manager, a message displays indicating that access is restricted and the booking(s) cannot be moved.

Swap Bookings or Blocks for a Day

You use this menu entry to exchange a room’s bookings and/or block times with those of another room.

1. Place the cursor in any part of either of the days you want to swap, right click, and then select **Swap Bookings** or **Blocks for a Day**.



2. In **To room** select the room you want to exchange schedules with.
3. To include block time in the swap, select **Include Blocks**. Otherwise, clear this box.
4. Click **OK**.

   The schedules are swapped according to your instructions.

Note: If a Surgeon on any of the selected Bookings is set to View Only access on the Physician Office Link tab in Security Manager, a message displays indicating that access is restricted and the booking(s) cannot be moved.

Surgeon Filtering for Rearrange a Day

When a booking is created in a multiple facility environment and the restrict_surgeon_lookup_by_facility application parameter is enabled, validation of the surgeon(s) and anesthesiologist(s) facility access will occur in Rearrange a Day when the following operations occur:

- **Drop Booking**

- **Drop Specific Queued Booking**
- **Drop All Queued Bookings**
- **Move Several Bookings**
- **Swap Bookings/Blocks for Day**

The system will first verify that all surgeons and anesthesiologists on the booking have access to the facility associated with the new room. If any of the surgeons or anesthesiologists that are assigned to the booking are not authorized for the new room then a message is displayed showing which is not authorized and the move process is aborted.

Rearrange a Day: The Booking Queue

The Booking Queue is a temporary storage place for bookings. You create the queue by moving bookings into it one at a time or by moving all the bookings for one or more rooms into it. You can move bookings from the Booking Queue to the Booking Grid to complete your work with the bookings. You can use the queue to store bookings while you rearrange other bookings on the grid.

Note: You can change a booking's duration while it is on the queue.

Booking Queue Functions

The following sections explain how to perform Booking Queue operations:

- *Move Bookings to the Queue* below
- *View or Sort the Booking Queue* on the facing page
- *Change the Length of a Simple Booking* on the facing page
- *Change Surgeon Offsets and Procedure Times in a Complex Booking* on page 128
- *Move a Booking from Queue to Grid* on page 128
- *Move All Bookings from Queue to Grid* on page 129

Move Bookings to the Queue

- Right-click on the booking and select either of the following:
  - *Move Booking to Queue*. Moves a single booking into the queue.
  - *Move Bookings to Queue*. Moves all the room's bookings for that day into the queue.

  The bookings are moved into the queue, and **Queued Bookings** appears on the left side of the screen.

Note: If a Surgeon on the Bookings is set to View Only access on the Physician Office Link tab in Security Manager, a message displays indicating that access is restricted and the booking(s) cannot be moved.

View or Sort the Booking Queue

1. Select **Sort/Process Queue** from the right-click menu or click **Queued Bookings** button.
   The Queued Bookings dialog opens.
2. Depending on the setting for the parameter **display_queue_booking**, you see either the **Sort Order #** column (on the left side of the screen) or up- and down-arrows.
3. (optional) Click a column heading to sort the list by that column. Click it again to reverse the sort order.

   Note: Use the horizontal scroll bar to display columns that do not appear in the screen.

   The order of the bookings changes based on the sort order you selected. This is the order in which bookings are arranged if you use the **Drop All Queued Bookings** option on the right-click menu to drop the bookings into a room.
4. (optional) The **Sort Order #** column and the up- and down-arrows give you yet another way to rearrange the booking queue:
   - If you see the **Sort Order #** column you can change the order by changing the numbers assigned to the booking.
   - If you see the up and down arrows, you can select a booking and move it up or down the list using the arrows.
5. After you are satisfied with the booking order, click **OK**.

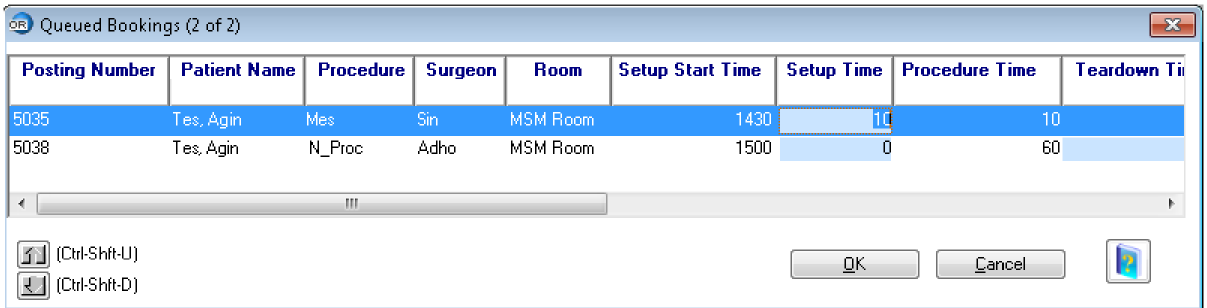
See also the *Security Manager Users Guide*.

Change the Length of a Simple Booking

Note: These instructions are for simple bookings, those with only one surgeon and only one procedure.

1. After moving the booking(s) you want to change to the queue. Click **Queued Bookings** to display the Queued Bookings dialog.
2. Highlight the booking you want to change. See *Change Surgeon Offsets and Procedure Times in a Complex Booking* on the next page if a message appears indicating that your selection is a complex booking.
3. Click in the time column (Setup Time, Procedure Time, Teardown Time) that you want to change for any booking.
   The blue selection bar turns to white to indicate that you can edit the selected time.
4. Change the time to the number of minutes you want.

Note: The number of minutes in the *Total Duration* column automatically change to reflect your edit as soon as you move the cursor out of the column.



5. Repeat steps 2 and 3 to change other times.
6. Click **OK** to save your changes.

Change Surgeon Offsets and Procedure Times in a Complex Booking

Note: You can use these steps to change surgeon offset times and procedure durations only. To make other changes to bookings, you must use the OR Booking screen.

1. After moving the booking(s) you want to change to the queue, click **Queued Bookings**to display the Queued Bookings dialog.
2. Highlight the booking you want to change. If a message indicating that your selection is a complex booking does not appear along with the **Edit Complex Booking** button, go to *Change the Length of a Simple Booking* on the previous page.

   You can now change the length of the setup time in the Queued Bookings screen.
3. To change surgeon offsets or the length of procedures, click **Edit Complex Booking**.

   The Edit Time: Complex Bookings screen opens.
4. If necessary, click the up or down arrows to display the surgeon or procedure that you want to change.
5. Click on Offset or Time entries to select and enter your changes.
6. Click **OK**.

Move a Booking from Queue to Grid

1. Right-click on the room and the time in which you want to place the Queued Booking, then select **Drop Specific Queued Booking**.

   The Queued Bookings dialog appears.
2. Highlight the booking you want to move, and click **OK**.

   The booking moves from the Booking Queue to the Booking Grid.

Move All Bookings from Queue to Grid

1. Right-click on the room and the time in which you want the first of the moved bookings to start and select **Drop All Queued Bookings**.
2. All the bookings in the queue move to the Booking Grid in the order in which they are listed on the queue.

Rearrange a Day: Fine Tuning Your OR Schedule

After using OR Manager's Rearrange a Day screen to arrange your OR schedule for the day, you may have some fine-tuning to do. Perhaps you want to insert or delete a 10 minute gap in the schedule, or you may want to eliminate down-time in a room by pushing bookings together.

The following sections explain important tasks for rearranging a day:

- *Insert Gaps* on the next page
- *Delete a gap* on page 131
- *Remove Unused Time* on page 132
- *View a Booking* on page 133
- *Cancel a Booking* on page 133
- *Wait List a Booking* on page 133
- *Choose Rooms and Fields for Display* on page 133

Rules for Inserting Gaps

Remember the following rules when inserting gaps:

- Inserted gaps begin at the point you click on the grid. If you insert a 30-minute gap at 9:00, the gap is from 9:00-9:30.
- If there is already a gap on the Booking Grid, the inserted gap begins at the point you click on the grid. So if there is already a 30 minute gap between 9:00-9:30, and you try to insert a 30 minute gap beginning at 9:00, nothing will happen. But if you insert a 30 minute gap beginning at 9:10, a gap will be inserted until 9:40—30 minutes from the insertion point for a total gap of 40 minutes.
- You can not break a booking in half. If you try to insert a gap in the middle of a booking, the bookings move down, and a gap is placed before it. So if there is a booking from 10:00-11:00 and you insert a 30 minute gap at 10:30, the booking moves to 11:00, and there is a 30 minute gap from 10:30-11:00.

Insert Gaps

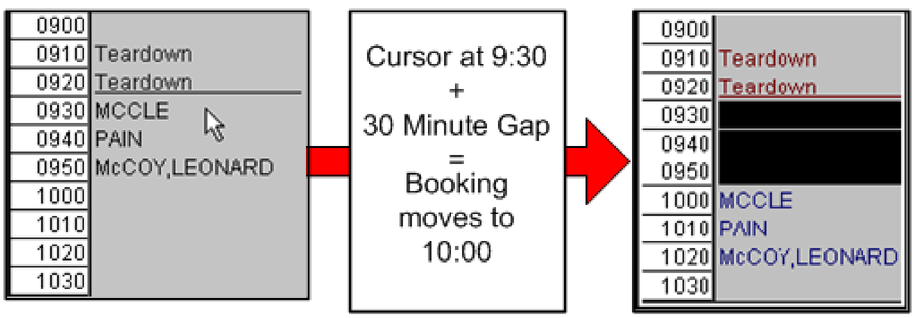
Note: See *Rules for Inserting Gaps* on the previous page.

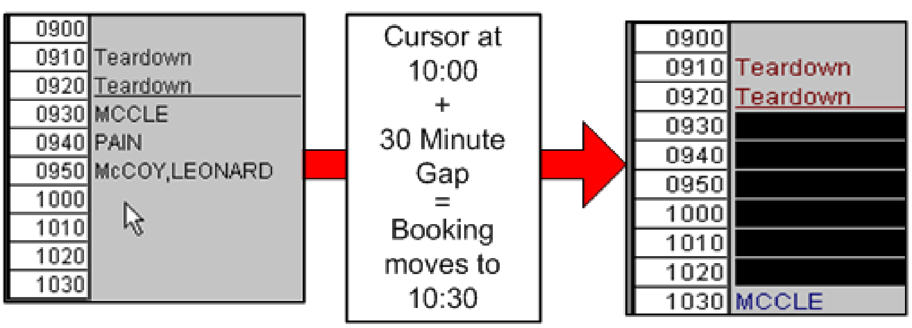
1. Right-click where you want the gap to start and select **Insert Gap**.
   The Insert Minutes dialog appears.
2. Enter the duration of the gap (in minute increments), and click **OK**.
   The gap appears on the Booking Grid.

Gap Diagrams

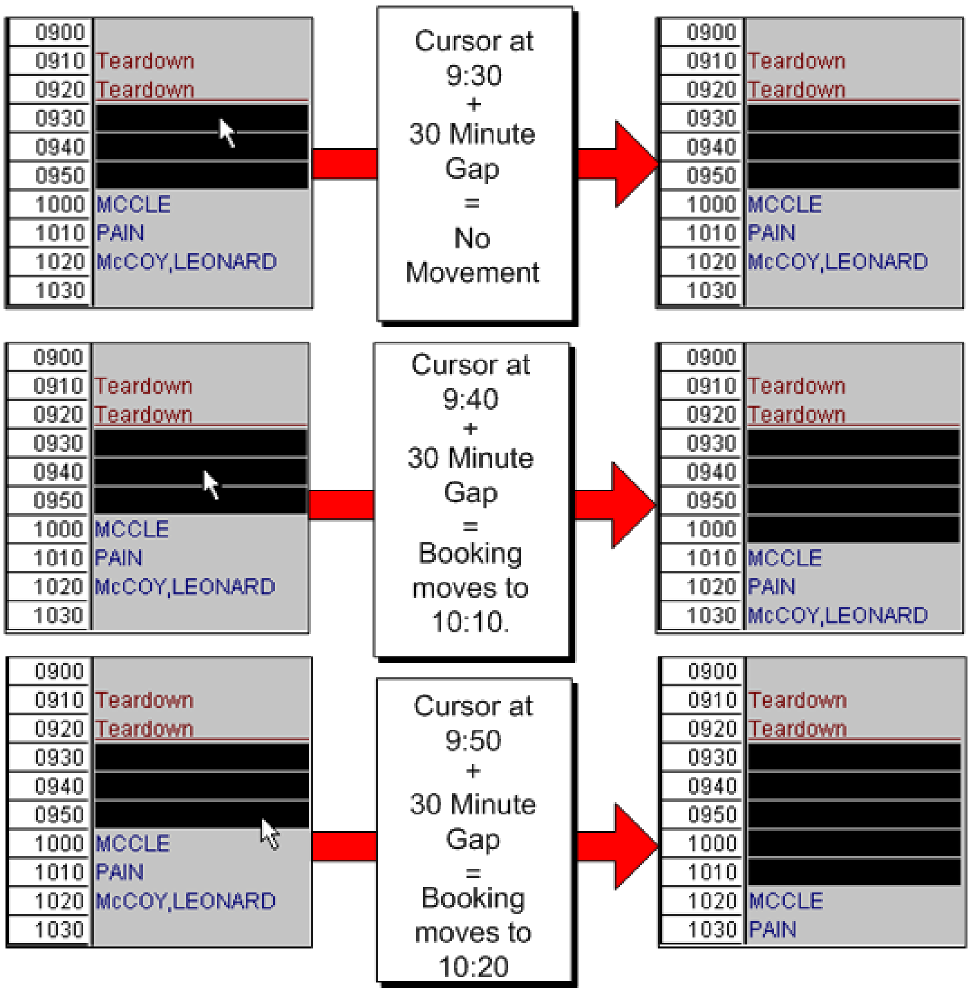
The following examples illustrate the rules for inserting gaps.

Insert a new gap





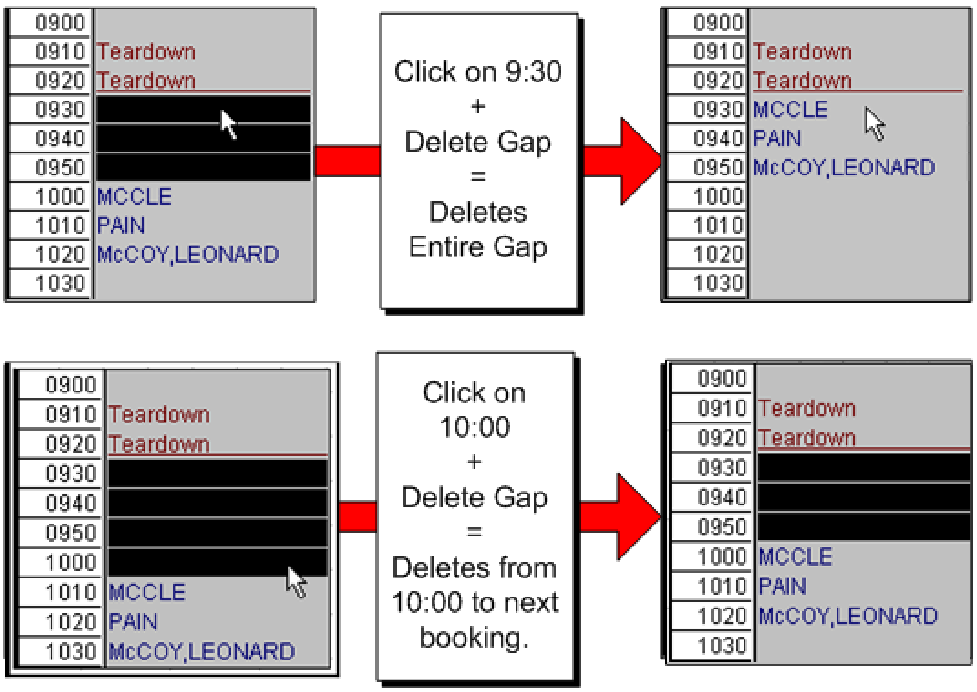
Expand a gap



Delete a gap

- Right-click in a gap where you want deletion to begin and select **Delete Gap**.

  The gap from where you clicked until the next booking is deleted.



Remove Unused Time

- Right-click on a room and select **Remove Unused Time From Room**.

  All bookings in that room are moved up, consolidating all the bookings and removing all down-time.

Rearrange a Day: More Booking Options

OR Manager's Rearrange a Day screen allows you to perform some basic booking management commands that include the following:

- View booking.
- Cancel booking.
- Wait list booking.
- Pick rooms for display.
- Select display fields.

View a Booking

- Right-click on the booking and select View Booking.

  The Booking Summary appears.

See *View Booking Data* on page 70.

Cancel a Booking

1. Right-click on the booking and select **Cancel Booking**.
   A confirmation screen opens.
2. Click **Yes**.
   The Cancellation Reason screen opens.
3. Select a **Cancellation Reason**and click **OK**.
   The booking is canceled.

Note: Pressing the space bar is the same as clicking **OK** or **Cancel**.

Note: If a Surgeon on the Booking is set to View Only access on the Physician Office Link tab in Security Manager, a message displays indicating that access is restricted and the booking(s) cannot be canceled.

Wait List a Booking

1. Right-click on the booking and select **Waitlist Booking**. A Confirmation dialog appears.
2. Click **Yes**. A dialog appears asking you to assign a priority.
3. Assign a **Priority** and click **Ok**. Booking is wait listed.

Note: If a Surgeon on the Bookings is set to View Only access on the Physician Office Link tab in Security Manager, a message displays indicating that access is restricted and the booking cannot be waitlisted.

Choose Rooms and Fields for Display

1. Right-click on the grid, then select **Pick Rooms for Display** (or **Select Display Fields**).
   The Select Rooms (Fields) for Display screen opens.
2. Move the rooms/fields from and to the **Available** and **Display** columns as desired.

See *Pick Rooms for Display Option* on page 80.

See *Select Display Fields* on page 81.

Block Time Inquiry

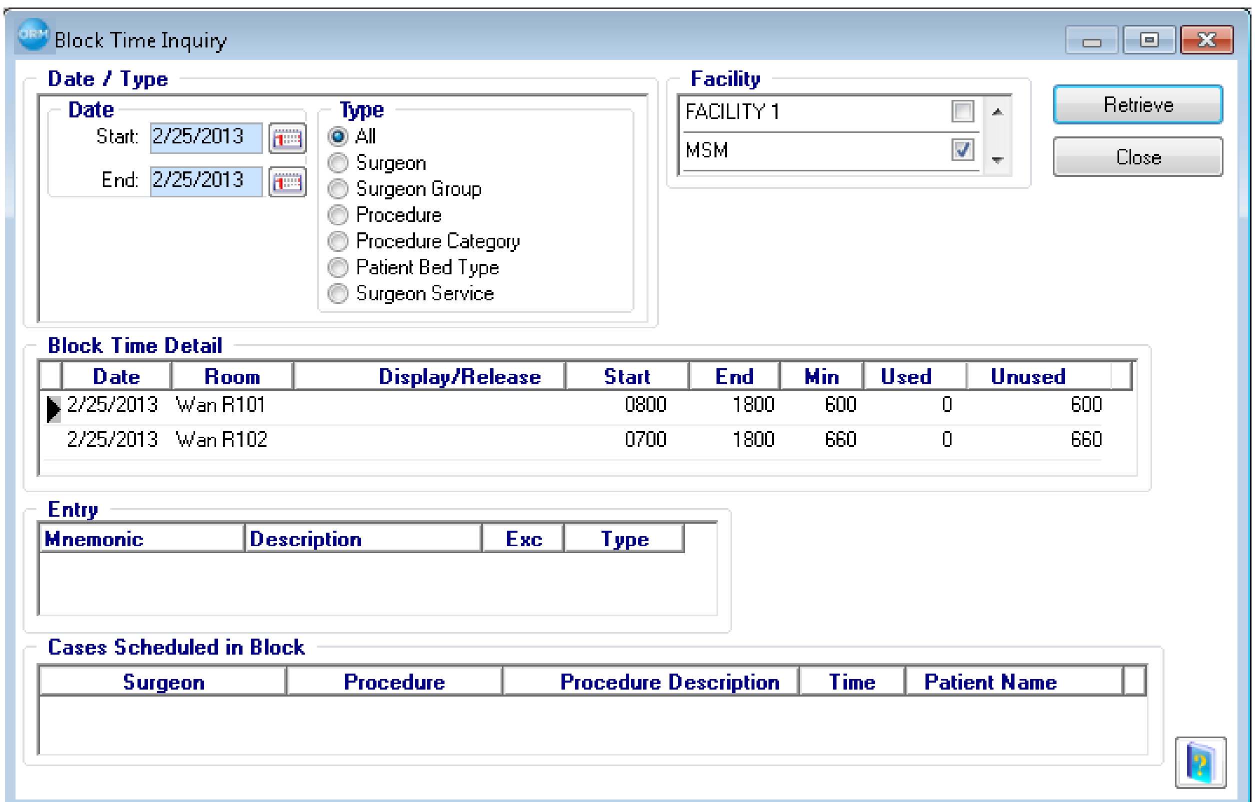
Menu:Tools > Block Time Inquiry

The OR Manager Block Time Inquiry feature allows you to view scheduled block times for a specified date range. You can view future scheduled block times, or you can view past block times to quickly check on block time use.

View Scheduled Block Times

1. Select **Tools > Block Time Inquiry**. The Block Time Inquiry screen appears.
2. Enter a **Start** date and **End** date.
3. Select a **Type**. The Entry drop-down menu changes as you change the **Type**. You can have more than one entry, but they must be of the same **Type**.
4. Click **Retrieve**.

   The Block Time Inquiry screen opens.



Request Inbox

Menu:Tools > Request Inbox

Request Inbox feature enables you to manage booking requests and reservations that have been made within a user defined number of days before and after the current date. The number of days is defined in the Request Inbox Parameters screen.

The data about the booking requests appears in the same format as data retrieved by the Manage Bookings screen. See *Screen Notes* on page 96.

If there are requests or reservations within this time span, OR Manager activates the red telephone icon on the OR Manager toolbar to automatically notify you about the requests.

You can then click the icon or select **Tools > Request Inbox** to bring up the Manage Booking Options screen showing only the booking requests within specified time period.

Status Column

The following Request Inbox statuses may appear:

- **R**: Request.
- **V**: Reservation.

See the *OR Manager Configuration Guide*: Other Booking Dictionaries.

7

Case Records

Overview

Menu:File > Enter/Edit Case Records

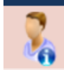
Case records are used to facilitate case documentation. Case documentation may be performed intra-operatively by nurses online in the operating room, post-operatively by data entry staff, or by a combination of both. OR Manager case records are customized, so you choose the layout and the information they contain.

Case records hold all of the documentation related to surgical cases, such as pre-op and post-op records as well as billing and cost information. They are fully customizable, so you can capture the information that your facility needs, and change it to meet changing needs. You can link case records to bookings, materials management (MM), and billing, so that procedures, materials, and billing data are automatically linked to them.

Note: An appendix in the *OR Manager Configuration Guide* provides information about the transition between different versions of ICD codes, including the behavior that determines the code version or versions visible as you work in the Case Record Header Section.

Case Record Toolbar

The icons are listed in the table below.

Icon	Tool Tip Name
	Patient Tab
	Edit Case Data Tab
	Process Section Tab
	Select Case Record Tab
	Patient Summary

Case Record Components

Case records are made up of several elements.

- **Header Section**: Information about the case as a whole, including procedure date, room, surgeon (s), procedure(s), equipment, resource(s) and anesthesiologist(s).
- **Case Record**: One or more sections made up of user-defined forms, called *pages* in case records. Sections can have one or more pages Each section relates to a different aspect of the case, such as Intra-operative Prep, Intra-operative Record, PACU, Laser Record, Cell Saver Record, etc.
  - **Patient Data Forms**: One or more user-defined forms that accept patient-specific data, such as address, allergies, insurances, etc. Patient Form data is shared by all of a patient's cases. Fields linked to admission information are automatically updated.
  - Case Records, Case Record Upload Data, and Custom Print Case Record are the only user-defined screens with sections.
- **Billing/Supplies Exception Noting**: Where standard supply and non-supply items, quantities, and prices for the operation are stored. This feature makes it easy to record and bill for items actually used by only changing those that differ from the standard.
- Other components of case information accessed through **Edit Case** tab buttons, such as **Billing History** and **Cost Analysis**.

Allergies, Reactions, and Precautions in Case Patient Forms

Allergies, reactions, and precautions entered within the case patient forms will update the booking patient data. This changes the patient's data for all bookings because this is at the patient level. At the time a patient is saved into a booking or case (add-on case or not), OR Manager merges the allergy, precautions, and surgical history data and whatever currently exists in OR Manager for the patient.

- Allergies and reactions entered via the HIS/CIS are shown in bold.

- If an allergy is deleted from a patient's HIS/CIS record it will be shown in strikethrough font with the bold formatting removed in OR Manager. Deleted HIS/CIS allergies are also placed after other allergies.
- Allergies are shown as underlined when they are coded medication interaction checking in Anesthesia Manager.

Formatting of Allergies

Example	Source of Data	Description of Text Format
Penicillin	Picis form	normal font
Penicillin	hospital information system	bold
~~Penicillin~~	HIS deleted allergy	normal font with a strikethrough These allergies sort to the bottom of the list.
<u>**Penicillin**</u> <u>Penicillin</u>	HIS (coded for MIC) Picis (coded for MIC)	Underlined text, regardless of source, indicates medication allergies that are coded for interaction checking in Anesthesia Manager.

Case Record Processing Features

Case records have several features that make processing easier and more secure:

- **Load Case Record Defaults**: Loads defaults from the Case Record Default dictionary so that common data does not have to be re-keyed. These defaults are surgeon- and procedure-specific and override standard defaults. Case record defaults are especially useful for shorter cases where documentation time is limited.
- **Link to Booking**: Links a case record to an existing booking and pulls in relevant data from the booking.This is used when the original link was not made, or if the original link was incorrectly made.
- **Electronic Signature**: Ability for each person responsible for the case to electronically sign off on his or her sections.
- **Lock Case Record** : This feature locks the case record in preparation for another individual to continue documentation, eliminating the need for the first user to sign completely out of OR Manager and ensuring that the audit trail accurately tracks which user performed which edits.

When the record is locked, a relief circulator can log into the record using his or her password, continue the case documentation, then log out when relieved.

Case Record AutoSave

The AutoSave feature records the computer name and periodically saves values in a table named *case_record_data_temp*. This is so that if your system fails when you are working in case records you will not lose the changes you have made. When the system becomes available again, you use the Case Record Recovery dictionary to restore your changes.

AutoSave runs automatically at specific time intervals. The number of minutes between AutoSaves is set by the parameter *case_rec_auto_save_minutes*. Note that the default setting is that AutoSave is not enabled. The recommended setting is five minutes.

See the *Security Manager Guide*.

See *OR Manager Configuration Guide*: Case Record Dictionaries.

Case Records Usage Roadmap

This following steps and diagram show how case records are used after the Case Record and Case Record Patient Data forms are built.

1. *Specifying a Patient*. In order to begin a case record, you must first specify a patient. You can also link the case to a scheduled procedure, or, if the procedure is not scheduled when you begin the case record (perhaps an emergency surgery), you can enter the basic procedure and patient information before you start the case record.

   See *(Case Records) Patient Tab: Overview* on page 146and *Patient Tab: Search Details* on page 150.

2. *Loading Case Record Defaults.* You can have OR Manager automatically fill in case record fields by linking it to a set of field-level defaults for a procedure/surgeon combination.

   If you begin a case record for a tonsillectomy by Dr. Jones, you can have the defaults for the Dr. Jones/tonsillectomy combination from the case record Defaults dictionary automatically fill in many of the record's fields.

   > **Note:** If the Case Record is linked to a booking, setup and teardown times are automatically populated from booking data.

   See *Edit Case Data Tab: Case Record Defaults* on page 200.

3. *Recording a Case*. You enter the case's data into the case record during or after the procedure. Fill in the pages in each section, and close the section when it is complete.

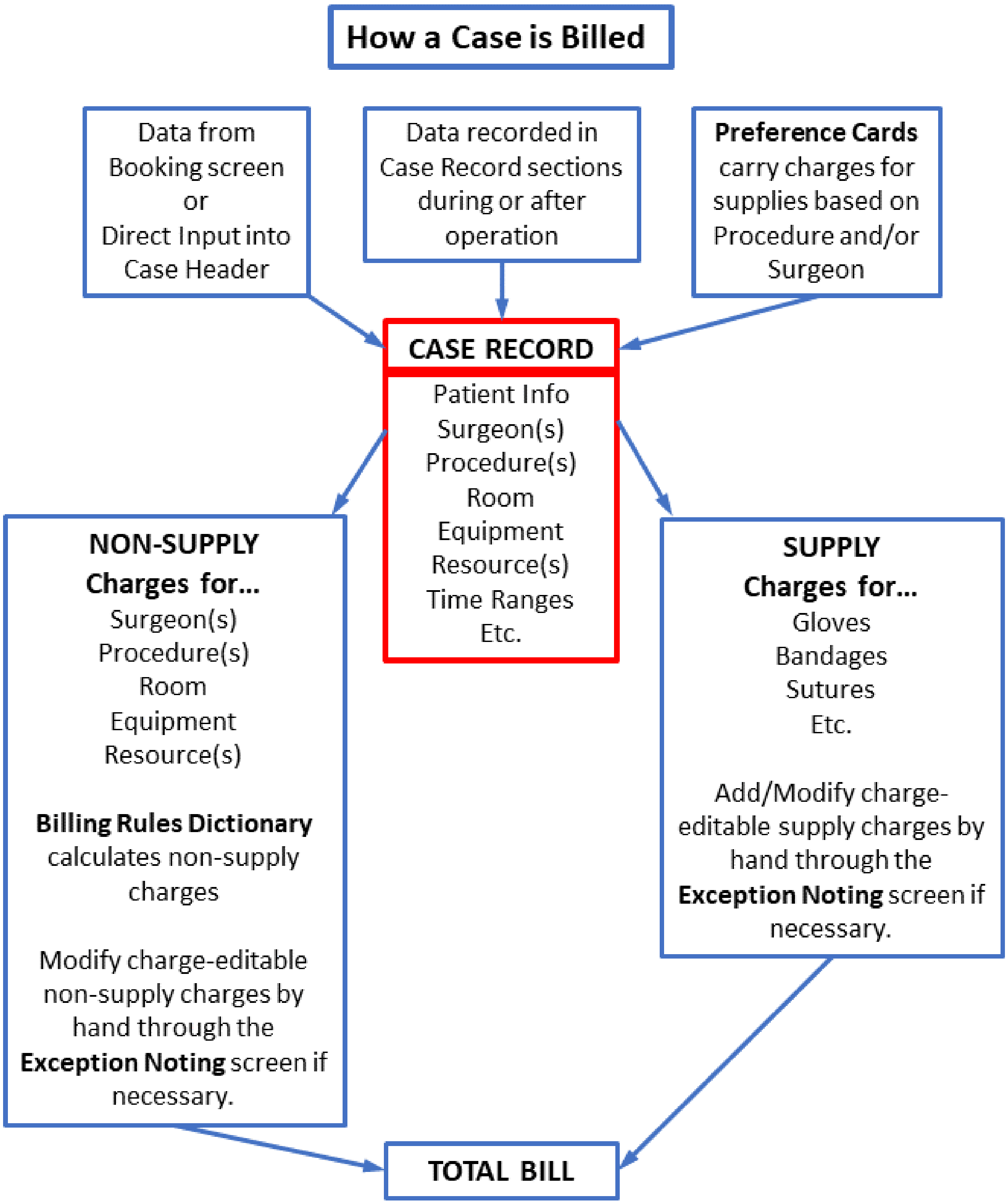
See *Edit Case Data Tab: Filling Out Sections* on page 165.

4. *Links to Billing*. Case records link to billing information so that all charges, material and non-material, are recorded in the case record. You can edit billing information using preference cards, noting additional supplies used, etc.

   With proper security privileges, you can also change the amount charged for both supply and non-supply items if the **Charge Editable** box in the Billing Procedure Codes dictionary entry for the corresponding item is selected.
   For more information on the preceding topic, see the following chapter in the *OR Manager Configuration Guide*: Billing Dictionaries.

5. After the case record is placed in Completed status, OR Manager compiles this information and queues it for transmission to your HCIS Billing and Accounts Receivable and Materials Management Systems. In addition, OR Manager compiles statistics for surgeons' average times for booking as well as the standard statistics reports (Block Time, Surgeon, and Room Utilization) from Completed cases.

   See the *OR Manager Configuration Guide*: Transmitting Charges and Supplies.


How a Case is Billed
Data from Booking screen or Direct Input into Case Header
Data recorded in Case Record sections during or after operation
Preference Cards carry charges for supplies based on Procedure and/or Surgeon
CASE RECORD
Patient Info
Surgeon(s)
Procedure(s)
Room
Equipment
Resource(s)
Time Ranges
Etc.
NON-SUPPLY
Charges for…
Surgeon(s)
Procedure(s)
Room
Equipment
Resource(s)
Billing Rules Dictionary calculates non-supply charges
Modify charge-editable non-supply charges by hand through the Exception Noting screen if necessary.
SUPPLY
Charges for…
Gloves
Bandages
Sutures
Etc.
Add/Modify charge-editable supply charges by hand through the Exception Noting screen if necessary.
TOTAL BILL

8

Case Record Screen

Chapter Contents

This chapter covers the following:

- *Edit Case Data Tab: PNDS Form*
- *Edit Case Data Tab: Check Case Times*
- *Edit Case Data Tab: Case Record Defaults*
- *Update NUR Linked Fields*
- *Add-On Cases Screen*
- *Completing a Case Record*

Accessing Case Records

You can create new case records using the following methods:

- Select **File > Enter/Edit Case Records**.
- Select **File > Enter Add-On Cases**.

You can also initiate a new case record from Manage Bookings or from SmartTrack. The *(Case Records) Patient Tab: Overview* on page 146 and *Patient Tab: Search Details* on page 150 sections guide you through searching for patients for the purpose of entering a new case record.

You can open existing case records for editing using the following methods:

- Select **Tools > Manage Case Records**. Manage Case Records enables searching for case records by a wide range and many combinations of criteria.
- Select **File > Enter/Edit Case Records**.
- Select **File > Recent Cases**. This selection presents you with a menu of up to 10 of your most recently edited cases.

You can also select an existing case record for editing from SmarTrack.

See *Manage Case Records* on page 218 for information on how to find and edit case records from the Manage Case Records screen.

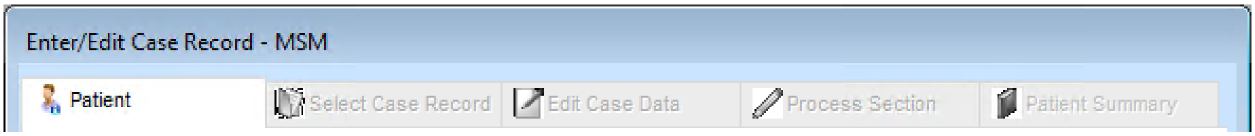
Case Record Screen Overview

Menu:File > Enter/Edit Case Records

The Enter/Edit Case Record screen is the focal point of the OR Manager case records system. It is here that you create case records, match patients and bookings with case records, and edit cases.

Most of the forms used in the Case Records screen are custom written for your facility to suit your needs.

Case Record Tabs



The Case Records screen has the following tabs:

- **Patient**:: The Enter/Edit Case Record screen opens to the **Patient** tab. Because all of the forms on the Patient tab are specific to your site, the **Patient** tab may look different than the images presented in this guide. The **Patient** tab serves two functions:
  - As a search screen to find the patient whose case record you want to work with. If the patient is not in your databases, you can create a new patient record.
  - To enter or edit information about the patient into the user defined patient data forms after the patient record is found or created.
- **Select Case Record**: After the **Patient** is selected, you use the Select Case Record tab to select an existing case record or to create a new one.
- **Edit Case Record**: After a case record is selected or created, you use the **Edit Case Record** tab to enter or edit data in the appropriate sections of the case record. In addition to the user defined sections, the **Edit Case Record** tab contains a number of buttons that take you to other screens for entering, editing, or viewing such things as cost analysis, billing history, and supplies, based on your user access.
- **Process Section**: Opens the selected section.
- **Patient Summary**: Allows you to view the Anesthesia Manager Patient Summary from an active case record in OR Manager. A warning message opens if the patient summary is not available for viewing because the patient has not yet been admitted in Anesthesia Manager, or the patient encounter has been transferred or discharged in Anesthesia Manager. When the Patient Summary is successfully viewed, (data is returned), this **Action** is captured in the Case Record Audit Trail via **Manage Cases** > **View Audit Trail** and displays as `VIEW PTSUM`. The format of the Patient Summary is governed by the configuration template being used by the related Anesthesia Manager session. See the *Workstation User Guide* for details of how to use Patient Summary and the *System Configuration Guide* for configuration details.

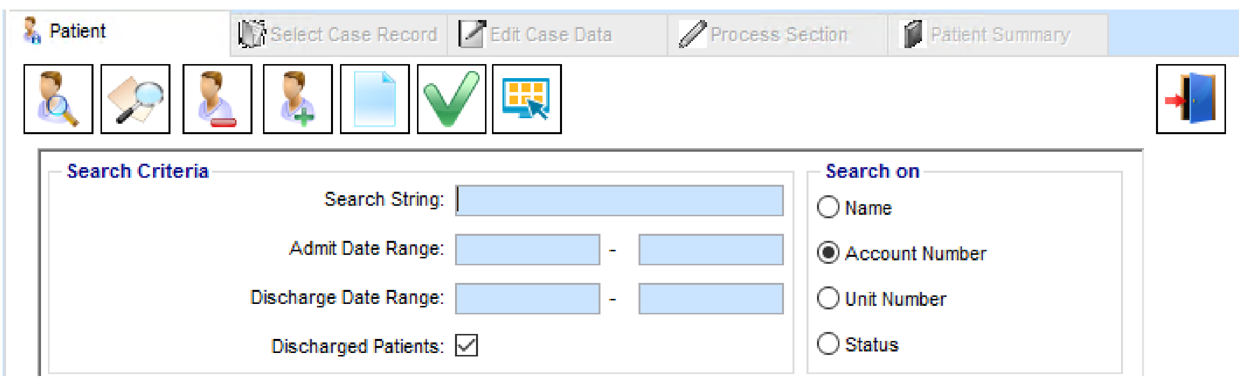
  The Patient Summary is available only in a read-only mode with the following functions available:
  - Change the viewing period
  - View notes, filtering and viewing the notes audit trail
  - View saved reports
  - Print summary, notes and saved reports

(Case Records) Patient Tab: Overview

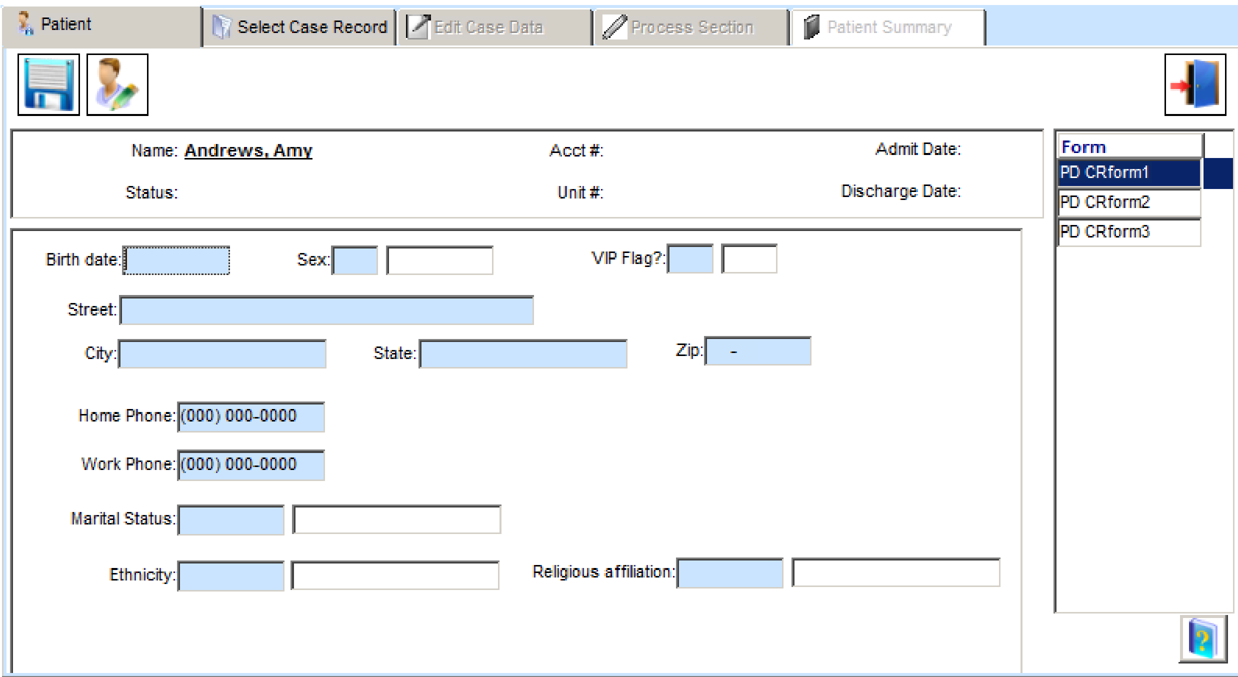
In a similar way to bookings, for case records the **Patient** tab also has two modes: **Basic Patient Information** and **Forms**.

- **Basic Patient Information** mode is displayed when you initiate a case record. It provides demographics fields for you to search for a patient in the OR Manager case record system or HIS system. You can also use this mode to create a new patient in the OR Manager case record system. After you select a patient for the case, you can no longer edit the basic patient information (but you can still access it in a view-only mode)
- **Forms** mode is displayed automatically after selecting the patient for the case. Patient forms are listed on the right and the first is selected and displayed by default. They are used to collect information about the patient. (Forms are configurable; they differ from one hospital to the next.)

Basic Patient Information Mode



Forms Mode



Forms mode opens automatically after selecting the patient and filling in the basic patient details for a new case record.

Patient data forms are configured by your hospital.

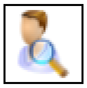
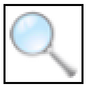
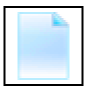
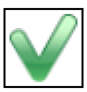
For information on editing and creating forms for your site, search for "User Defined Screens" in the *OR Manager Configuration Guide*.

Note: An ellipsis (...) at the end of a field indicates that the text is too long to be shown on the form. You can click the field to see the full text. Note also that any screen printouts of the form will only show the truncated text, just like the form.

(Case Record) Patient Tab Toolbar Buttons

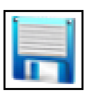
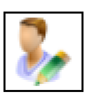
The available buttons depend on the mode.

Patient Basic Information Mode

	Search the OR Manager case record system.
	Search the HIS
	Selects the last patient whose forms were opened
	Create a new patient in the OR Manager case record system
	Clear the search fields
	Save the currently selected patient to the case record.

Forms mode

	Saves changes
	Switch to a different patient. (Note this button is only available while you are creating a case record. It does not change the patient assigned to an existing case. For information on changing the patient assigned to an existing case, see *Change Patient on page 223*)

Patient Tab: Patient Search Options

Search Options

Best Practice: Picis recommends that you search for a patient using different methods in the order shown below until you find a match:

1. Search the OR Manager database. Patients in the OR Manager database have previously had surgery at your facility.

   Note: A patient will only be found if a *case record* was previously created for that patient in the system. If a patient has a booking in the OR Manager system, but not a case record, no match will be found.

   If the patient is not found, OR Manager asks if you want to do an MRI search.
2. Search the HIS for patients who have been previously admitted to your facility but have not had surgery there in the Picis system.

   If the patient is not found, OR Manager asks if you want to do a Soundex search.
3. The Soundex Search option is offered when OR Manager cannot find a match on the character string you entered for the HIS search. The Soundex Search looks for character combinations that may not exactly match what you put in the **Name** box but are close.

   Example: Keying in “bawl” could bring up patients Brawely, Ball, and Bailey.

Note: Only if you cannot find a match with the previous methods, should you create a new patient record (which gets added to the OR Manager case record system).

Search Option Notes

- The information you must key in to perform a patient search is controlled by a setting in Security Manager. Requirements can be one of the following:
  - Exact name plus: SSN, date of birth, or unit #.
  - Partial name plus: SSN, date of birth, or unit #.
  - No restrictions, meaning that you can enter partial name, SSN, date of birth, and/or unit # at will.

- Picis can disable the **New Patient** button until both an OR Manager database search and HIS search have been conducted. This feature makes it more difficult to inadvertently add duplicate patients to the database. Contact the Picis Client Center for more information.

  See the *Security Manager User Guide* for more details.
- See *Booking and Case Record Internals* on page 28 for an explanation of what happens in the system when you choose various options.

Patient Tab: Search Details

Account Number searches

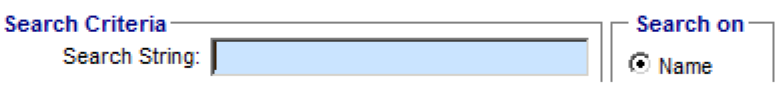
Best Practice: Search by account number whenever possible.

You must enter the complete account number, including zeros, spaces, etc.

Unit Number searches

You must enter the complete patient unit number, including zeros, spaces, etc. Leading spaces may be omitted.

Patient Name Searches



You can enter a full or partial name.

Example: If you enter “D”, patients whose last name starts with “D” are listed.

Multiple word search

When searching by name using multiple words, OR Manager assumes the following word order:

Last - First - Middle - Suffix

Examples:

If you enter the text *John van der Mere* this would be erroneously interpreted as follows:

Last – John

First – van

Middle – der

Suffix – Mere

In this example, you would instead need to use a different word order together with a comma, as follows: *van der Mere, John*

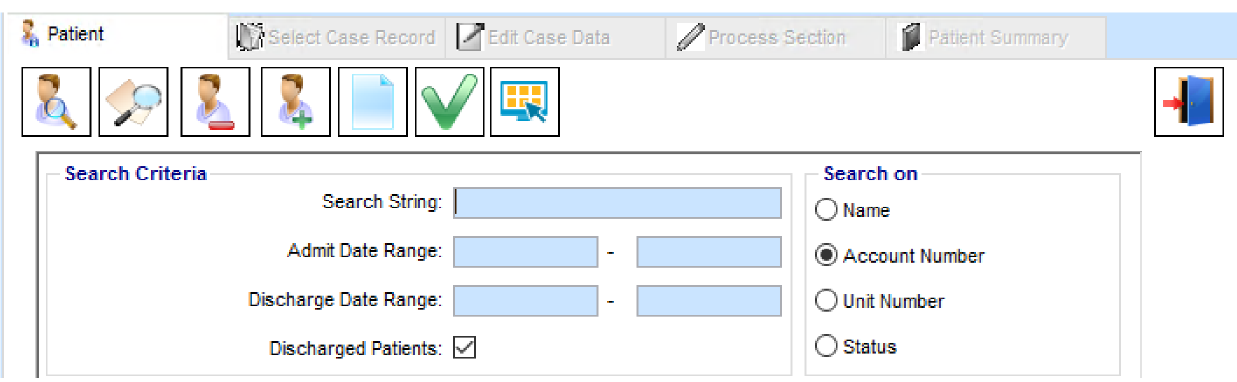
More examples:

To Search for this.	Enter this...
John van der Mere	van der Mere, John
Mary-Louise Parker	Parker, Mary-Louise
Adrian Stuart Morse	Morse, Adrian, Stuart
James Baker Jr	Baker, James, , Jr

Recommended Search Methods

Note: If you initiate a case record from a booking in a system integrated with Anesthesia Manager and select a patient with a different MRN from the booking, a message appears. The message requests correction of the patient or the creation of an add-on case for the selected patient. Click **OK** on the message to display the most recent patient search results without initiating a case record.

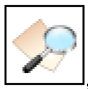
Search for a patient



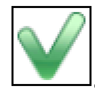
1. Enter your search criteria in the fields provided. You do not need to complete all fields.

Best Practice: The fastest and most reliable search method is to enter the patient's Account Number.

2. Set the method for the **Search String** field, as required.

3. Click the **Patient Search** button, , to search the OR Manager case record system or the **MRI Search** button, , to search your HIS system.

   The bottom of the screen lists the patients who meet your criteria:

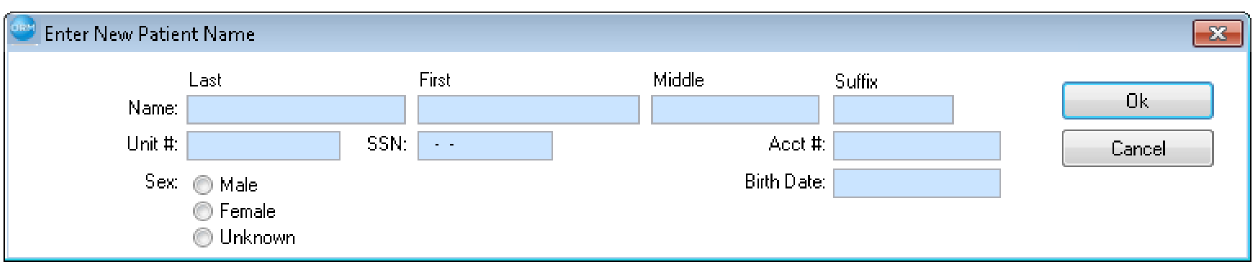
4. Double-click the patient's name or select the patient and click the **Select** button, .

Note: Instead of clicking **Select** in the last step, you may want to use the Quick Case feature, which enables you to match the selected patient with a booked procedure in order to make creating a case record much faster. See *Patient Tab: Quick Case* on page 154.

Enter a new patient in the OR Manager case record system

Note: Before entering a new patient you should be certain the patient is not already in the OR Manager case record system or the HIS system.

1. Click the **New Patient** button, .
2. Add or edit the new patient information, then click **OK**.



Note: The values entered for **Unit #**, **SSN**, **Birth Date**, and other details in this screen are copied automatically to the case record patient date. This unit number is copied for an add-on case for a booking patient with a unit number even if no account number exists.

Note: Patients entered as New Patients do not have an Account Number or Unit Number and cannot be billed until they are admitted through your hospital's admissions system and the case record is linked to the patient. As an alternative, you can assign an account and unit number within OR Manager by using the Change Patient feature in Manage Case Records. After the case is assigned account and unit numbers, any patient data entered in case records is overwritten by the information entered into Admissions.

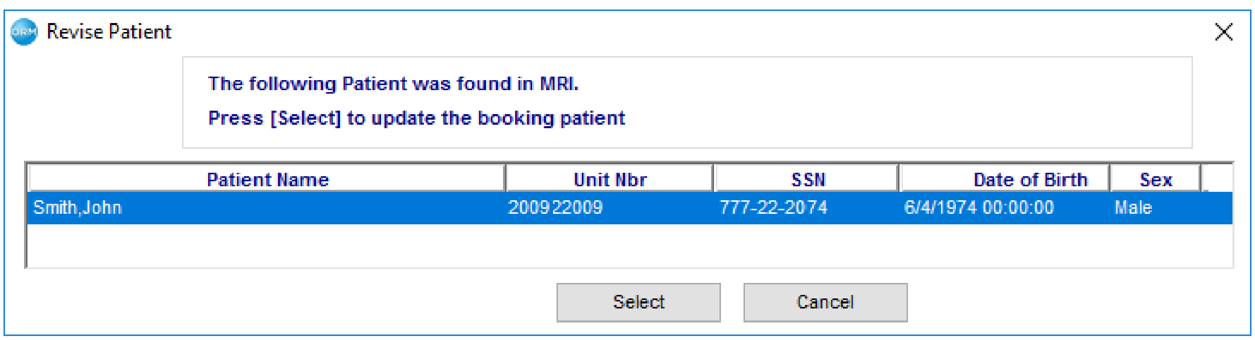
Note: There is a parameter **booksheet_patient_search** to disable the New Patient button until after users search OR Manager, admissions, or both. This feature ensures that users search for existing patients before entering a new patient in the database.

See the *Security Manager Users Guide*.

See *About the Suffix* on page 59.

Revise on Mismatch

When initiating a case from a booking for a patient that was entered directly into OR Manager, users are able to choose an MRI patient. In such a scenario, a Revise Patient message appears so users can merge patient data (retaining any preoperative evaluation data).



When a patient merge occurs only the current booking's data will be updated. If any other booking exists in the system for the patient the user-defined data for that booking will not be updated.

To enable this function, the flag r*evise_patient_on_mismatch* must be set to **Y** via Application Parameters in Picis Security Manager. For details on the application parameters see the *Security Manager Users Guide*.

Patient Tab: Quick Case

The Quick Case feature allows you to create case records by selecting the booking for which you want to make a case record. All you have to do is specify the patient and the date of the operation.

Use Quick Case

1. Enter the search criteria in the Enter/Edit Case Record screen's **Patient** tab as you would for creating or editing any case record. See *Search for a patient* on page 151.

   Note: When creating a case via Enter\Edit and performing a quick case, a list of bookings is displayed based on date and patients with a similar name. If the booking patient and case record patient unit numbers are different, a warning message is displayed, and clicking **OK** returns the user to the list of bookings for re-selection.

2. After you have selected a patient from the search list, enter a **Booking Date** at the bottom of the screen, or keep the current date, which is the default.
3. Click **Quick Case**.

   Quick Case looks for an operation for the patient you selected on the date you specified.

Quick Case Result	Action Based on Result
one match	It goes through a validation process and creates a new case record with the patient header information already filled in. The new case record opens directly on the Enter/Edit Case Record screen.
one match, but a case record already exists for it	It asks you if you want to create another case record for the same operation. If so, it goes through the process of creating a new case record as described above. If not, it opens the current case record for editing.
multiple matches	It displays a selection screen showing all of the matching operations. Select which of the operations to create a case record for.
no matches	It displays the first page of the Case Record screen for you to enter patient and other information the same way you would do it in a non-Quick Case situation.

4. Enter and edit data in the case record as you would in any other case record.

Notes about Quick Case

- Quick Case only finds bookings that were made in the facility you selected for entering and editing cases, so it is important that you choose the right facility before entering the Enter/Edit Case Record screen.
- Quick Case only looks for bookings for operations that are to be performed on a particular patient on the date you specify.
- You cannot link a booking to more than one case record.
- The default **Booking Date** is the current date unless it is set to another date by a parameter (*quick_case_day*). You can override the default date to enter any date you choose.

See the *Security Manager Users Guide*.

Patient Tab: Patient Data Forms

The **Patient** tab is made up of any number of user defined patient data forms. The data in these forms is shared among all of the cases for the same patient. This tab is always available when working with the case record.

Audit Trail

If administrators have set permissions for you, you may see the audit icon immediately in front of the label for a field.

This icon indicates that the field value was changed and saved more than once. You can click the audit icon once to see the Field Level Audit Trail screen for the field. The Field Level Audit Trail screen provides information about changes in the values in the field. For more information about the Field Level Audit Trail screen, see *Case Record Audit Trails* on page 225.

If two users are working with fields in the same form, changes made by one user are not shown by updating the audit data or making the icon visible for the other user until the other user leaves the form and returns to it.

Buttons

The buttons in the lower right of the screen offer the following choices:

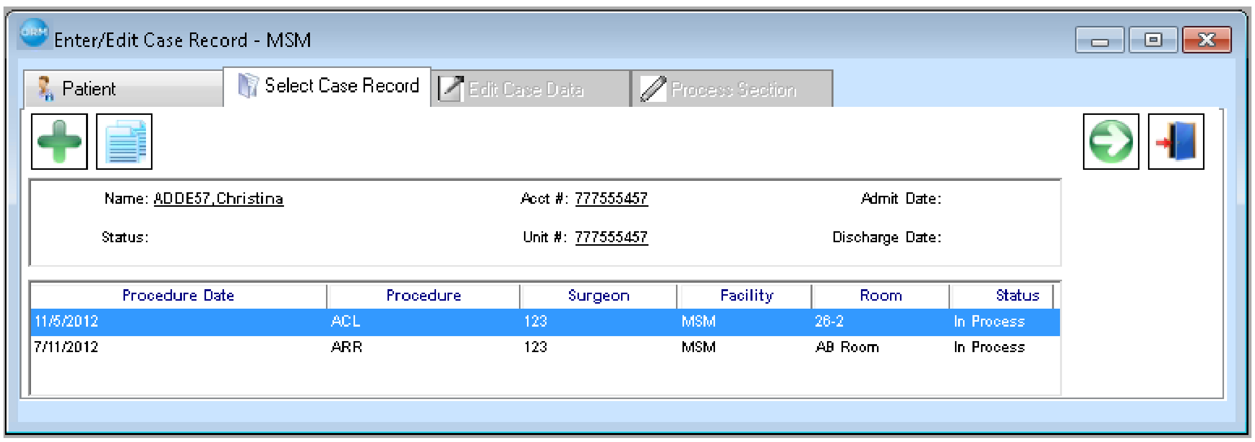
- **Change Patient** returns you to the select cases for a different patient after you have selected that patient.

Note: Using this feature does not reassign any case record to a new patient. This might be needed if the wrong patient was chosen for the case. See *Change Patient* on page 223 to change the patient on a case in this way.

- **Save** saves the changes you made after checking that the mandatory and recommended fields are complete.
- **Close** exits the screen after notifying you of any unsaved changes.

Select Case Record Tab

The **Select Case Record** tab is used after a patient has been selected for an existing case, beginning a new case record, or to copy an existing case to create a new case.



Copy Case

The Copy Case feature copies patient, header and link-field information from a previous case into a new case record.

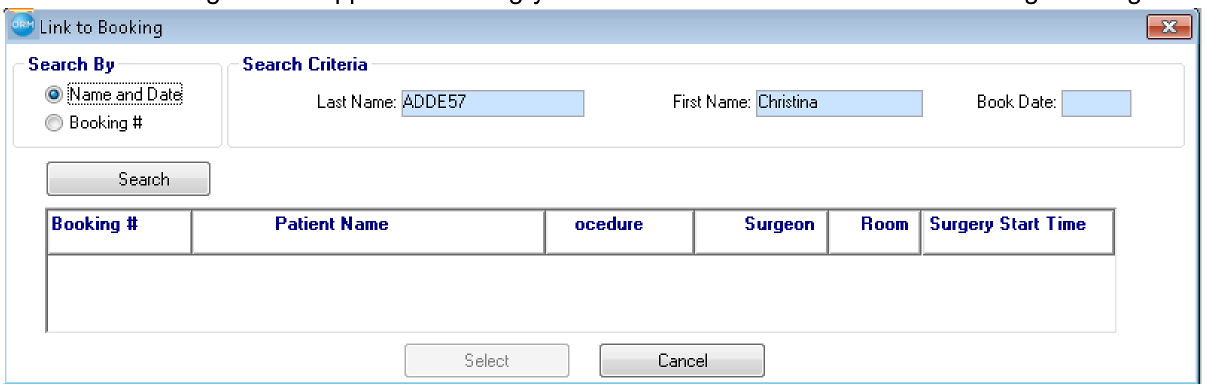
For example, you could use this feature with pain management cases since many of these cases are very similar to each other. You can simply copy the first case to create a new case with much of the pain management information from the first case defaulting into the new case, so that you avoid having to re-enter the same information.

Since this is occurring under the same visit and account number, if the second surgery is similar to the first the users can use the copy case feature to quickly create a case and all the info from the first case defaults into the second.

Begin a New Case Record

1. Click **New** on the **Select Case Record** tab.

   A Link to Booking screen appears allowing you to link this case record to an existing booking.



2. Link the case record to a booking (if applicable). If the procedure has been booked in OR Manager, this feature automatically fills in the header section of the case record for you. To set it up, do the following:
   - Select **Search By** to search by **Name and Date** or **Booking #**.
   - Enter the **Book Date** or **Booking #** and click **Search**.
   - Select a record from the resulting list to link the booking to the case record, then click **Select**.

   The **Enter/Edit Case Data** tab comes up.

Note: You cannot link a booking to more than one case.

Note: If a booking includes home medications data, that data is displayed in a case record created from the booking.

3. If the procedure has not been booked in the OR Manager system, click **Cancel**.

   The Enter/Edit Header Section screen appears.

See *Header Section Screen* below.

Header Section Screen

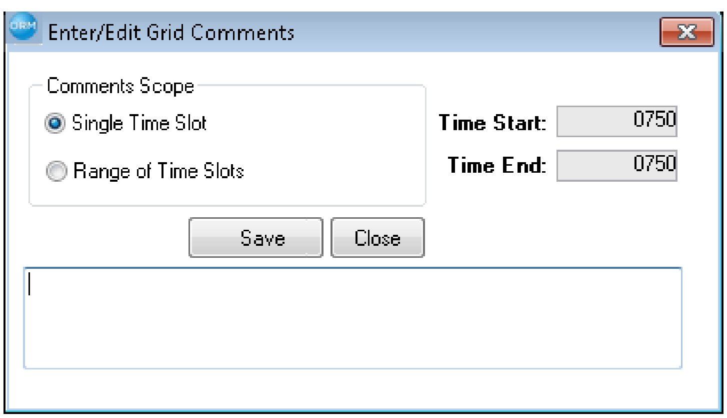
The Header Section screen is used to track events during surgery and to pull booking data into the case.

Use the Enter/Edit Header Section screen to enter or edit case-specific information, such as procedures, surgeons, equipment, and dates that appear in the headings of the screens for new cases. If a case is linked from a booking, much of the data on this screen is automatically pulled in from the booking. If the actual case data is different from the booking data that is pulled in, you need to update the appropriate fields as necessary.

If you try to access the Process Header when another user has a section of the same case open, a prompt opens as notification there is a section open and displays all the locked sections as a list. This prompt allows you to click **OK** or **Cancel**. Clicking **OK** opens the Process Header in View Only, and **Cancel** returns you to the previous screen.

This prompt displays whenever a user clicks **Process Header** and another section is open, regardless of the user or workstation (including the same user from the same machine.) A different notification appears when a case record header is saved while its section is already opened, but also requires you to click **OK** to continue.

⚠ **CAUTION:** The **Billing History** button remains enabled when accessing the Process Header in View Only mode. The **Supplies**, **Cost Analysis**, **Print**, and **Save** buttons are always disabled. Failure to update the header screen with accurate case data results in inaccuracies in most standard OR Manager statistical reports and Extelligence. This is important as all OR Manager case reports and Extelligence use Header data in the respective calculations. For example, the block time utilization report and surgeon utilization report use the header Room, Surgeon and Date entered on the completed case record for calculation. Ensure all Header field data is correct upon completion of the case record.



Note: The Surgeon, Procedure, Equipment, etc., boxes are filled out in the same way as they are on the OR Booking screen. .

The buttons in the lower right of the screen are duplicates of some of the buttons on the **Case Data** tab. However, the Exception Noting screen displayed by the Supplies/Billing button is slightly different from the screen shown through the **Case Data** tab. It does not show non-supplies.

See *Edit Case Data Tab: Buttons* on the next page.

Important Notes

- You must capture case data and make all necessary changes on this screen because the standard statistical reports use data from this screen only.
- Since the header information controls the billing codes and section screens, you should always check this section for accuracy when you initiate a case record.
- You should re-check this section for accuracy before completing a case.
- *Do Not* track actual surgeon, procedure. etc. case data elsewhere, in places such as user-defined screens, because it will result in inaccurate statistical report output.
- You might choose to add a label in user-defined screens reminding the user to update the header if a change occurs.
- If you open a case record that uses unauthorized equipment, you can remove the unauthorized equipment and add authorized equipment, but it is not possible to add unauthorized equipment. The case record is filed even with its unauthorized equipment.

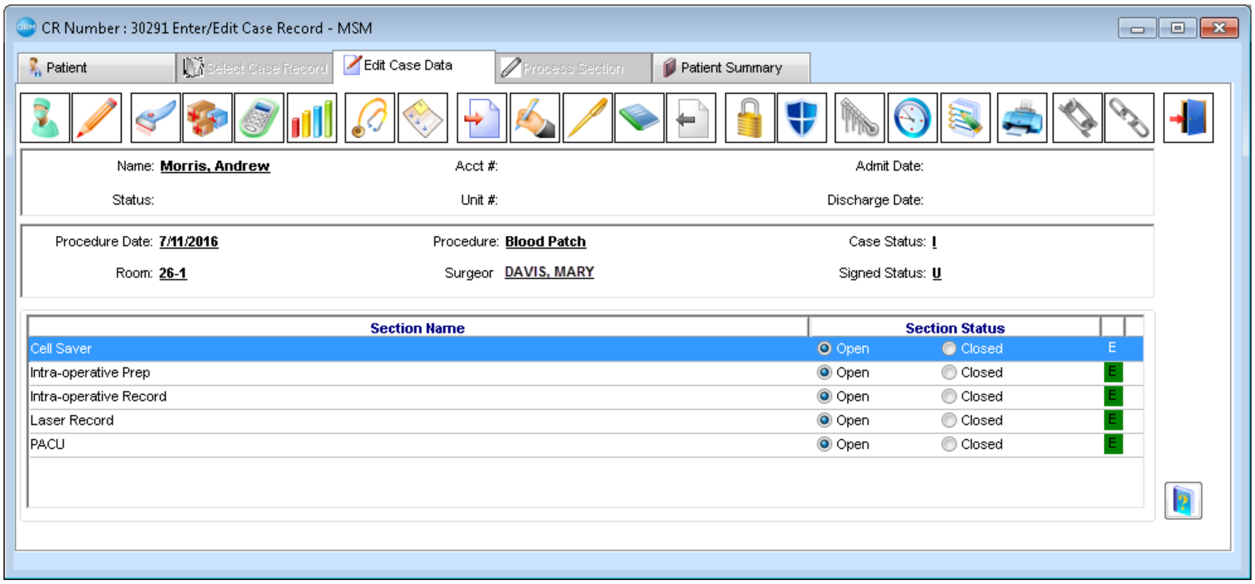
Edit Case Data Tab

After you have located or created the case record for a patient, you use the **Edit Case Record** tab to work with the case record. The case record consists of user-defined forms, or sections. In addition to these sections, the Edit Case Record tab contains buttons that take you to other screens for entering, editing, or viewing such things as cost analysis, billing history, supplies, and the ability to close all sections of a case record.

Edit Case Data Tab Example

The example below illustrates what you see when you first open the **Edit Case Data** tab. Because sections are custom-defined, the number of sections as well as the names of the sections you see may be different than shown.

- The information at the top of the tab is from the header information you entered in the header section screen or was pulled in from the bookings module.
  - **Case Status** tells you if the case is Complete (**C**) or In-Process (**I**).
  - **Signed Status** tells you whether all users involved in recording this case have signed off (**S**) or not signed off (**U**) on their entries or edits.



- The list in the lower left side displays the sections of the case, as well as the status of each section. The **Section Status** column tells you whether the section is open or closed. (You close each section after completing it). It also tells you whether you have the security access to edit the section:
  - **Green E**: You can edit the section.
  - **Yellow V**: You can view, but not edit, the section.
  - **Red N**: You cannot access the section.
  - The buttons in the lower right side enable you to modify the header information and section information, as well as giving you access to such things as billing and cost analysis data. These buttons are described in the following topics.

Edit Case Data Tab: Buttons

The buttons on the **Edit Case Data** tab enable you to edit header information and Case Sections as well as give you access to other case-related screens such as Billing History and Cost Analysis. Button availability is based on individual user access.

Edit Case Record Data Icons

Icon	Tool Tip Name
	Process Header
	Process Section
	Supplies/Billing
	Implants
	Billing History
	Cost Analysis
	Vital Signs
	PNDS Form
	Load Case Record Defaults
	Electronic Signature
	List Signed/Pending
	Change Case Status
	Lock Case Record
	Field Level Audit Trail
	Freeze Non-Supplies
	Check Case Times
	Tray/Pack/Kit Instruction:

Buttons Table

This table gives a short description of each button and, if necessary, points you to more information about the functions the buttons access. It also provides the shortcut key combination which allows you to access the screens from your keyboard:

Button	Description
Process Header	Process Header brings up the Header Section screen for editing. *Header Section Screen* on page 157.
Process Section	Brings up the highlighted Case Record Section for editing. *Edit Case Data Tab: Filling Out Sections* on page 165.
Supplies Billing	Displays supply and non-supply items used and billed for during the operation and allows exception noting. *Edit Case Data Tab: Exception Noting* on page 169.
Implants	Displays OR Manager and MMIS stock defined as implants, including Tray/Pack/Kits defined as implants. The functions available on this screen are similar to those discussed in *Record an Implant* on page 187. Right-click under **Implants** to select Add Stock Item or **Add Tray/Pack/Kit**. Scan Mode is available in this screen. For an explanation of Scan Mode actions, see *Scan Mode Operations* on page 179.
Billing History	Brings up the Billing History screen. Items display only after a case is placed in Complete status. The column “Linked with TPK” indicates stock linked to tray/pack/kits. The column “From TPK” indicates items that appear due to selection of two options: Edit Stock on CR or Charge for Individual Stocks. Use Area is not displayed in the Billing History or Billing History Report.
Cost Analysis	Shows the cost of all supply and non-supply items used in the operation by category. *Edit Case Data Tab: Cost Analysis* on page 194.
Print Case	Prints the case record in one of four formats. The default format is set by application parameter *case_record_print_default*. If text is too long to fit in a field, the printout will display an ellipsis, which is three dots (...).
Vital Statistics	Record and display Vital Statistics on a graph. *Edit Case Data Tab: Vital Statistics*.
PNDS Outcomes	Displays case record fields tied to PNDS Outcomes and their responses. For more information on the preceding topic, see the following chapter in the *OR Manager Configuration Guide*: PNDS Interventions and Outcomes.

Button	Description
Tray/Pack/kit Instruction	Displays and/or prints the Instruction Notes from the Tray/Pack/Kit dictionary.
Check Case Times	Displays the case record Time Field Values screen. *Edit Case Data Tab: Check Case Times* on page 197.
Load Case Record Defaults	Loads the defaults from the Case Record Default dictionary. This feature allows you to load in standard case record information for cases using this surgeon and procedure rather than having to enter it by hand. These defaults overwrite any standard defaults assigned when building fields. Be careful to identify your need for case record defaults soon after initiating the case. Otherwise, you risk overwriting data entered earlier, perhaps in a previous section. *Edit Case Data Tab: Case Record Defaults* on page 200.
Link To Scheduling Record	Brings up the Link to Booking screen so you can link the case record to an existing booking. See *Begin a New Case Record* on page 157. This is used when no link was made when the case record was started. It is also used if the case was initially linked to the wrong booking. Linking a case to a booking after the case record is started overwrites data already entered in the fields that are affected by the link. Linking a case to a different booking will break the first link and overwrite data from the previous link. In a Total Perioperative Automation site, if an add-on case record has been created with no link to a booking, and a change patient action attempts to link the add-on case to a booking with a different MRN from the add-on case's MRN, a message appears. The message requests the correct booking patient or the creation of an add-on case for the selected patient. The change patient action is not executed, and clicking **OK** on the message displays the Link to Booking screen with no search results.
Drop Existing Link	Allows you to break the link to an existing booking.
Electronic Signature	Allows you to electronically sign your portion of the case record using your sign-on.

Button	Description
List Signed/Pending	Brings up the View Signed/Pending Users screen that lists each user assigned to this case record and whether he/she has signed off on it (*Unsigned* means that the case is pending signature.)
Change Case Status	Changes the case status from Complete to In Process and vice versa. Cases must be placed in a Complete status for billing to be calculated and statistical information to be compiled.
Lock Case Record	Locks the case record until another user signs in. Taking this action has the following effects: * Closes the Manage Bookings screen, where you enter selection options. * Closes the Manage Bookings Options screen, which displays retrieved results. * Closes the Manage Case Records - Selection screen where you enter selection options. * Closes the Manage Case Records screen, which displays retrieved results. * Closes the Schedule Viewer. * Closes Tracking screens. *If other screens are open, a message reports them and prevents locking.
Field Level Audit Trail	Lists changes to data field in the case record. Also available from the Manage Case Records Results screen. See *Case Record Audit Trails* on page 225 for complete information on using the audit trail screens. You can also display individual field audit trails from within case records using CTRL+CLICK on any field. See *Field Audit Trails* on page 169.

Button	Description
Process Non-Supplies or **Freeze Non-Supplies**	This button toggles between the following: **Process Non-Supplies**and **Freeze Non-Supplies** for cases whose Case Status has been changed from (C)omplete to (I)ncomplete: • Process Non-Supplies means non-supply charges are to be calculated on current case information. That is, non-supply charges made after re-opening the case could be included in the new calculations. • Freeze Non-Supplies means that no new charges are to be calculated as a result of re-opening a case. The default can be either to process or to freeze non-supplies, depending the setting for parameter *cr_autofreeze_nonsupplies*. For more information on the preceding topic, see the *Security Manager Users Guide*.
Edit **Milestones**	Allows users to change milestone dates from a centralized location.
Close	Closes the Case Record screen.
Close All	Closes all the sections of the Case Record that the user has the appropriate access to do so. This button is inactive when all the sections are closed, or if the user is restricted from closing the sections that may remain open.

Edit Case Data Tab: Filling Out Sections

There are two ways to fill out your case records:

- **Intraoperatively**: Online in the system in the operating room.

  If you have a PC in the operating room with OR Manager installed, you can fill out the case records while the procedure is taking place.

- **Post Operatively**: Following the operation.

  If you do not have a PC with OR Manager in the operating room, you must keep a paper record of your case data and enter some or all of the case data into case records after the operation.

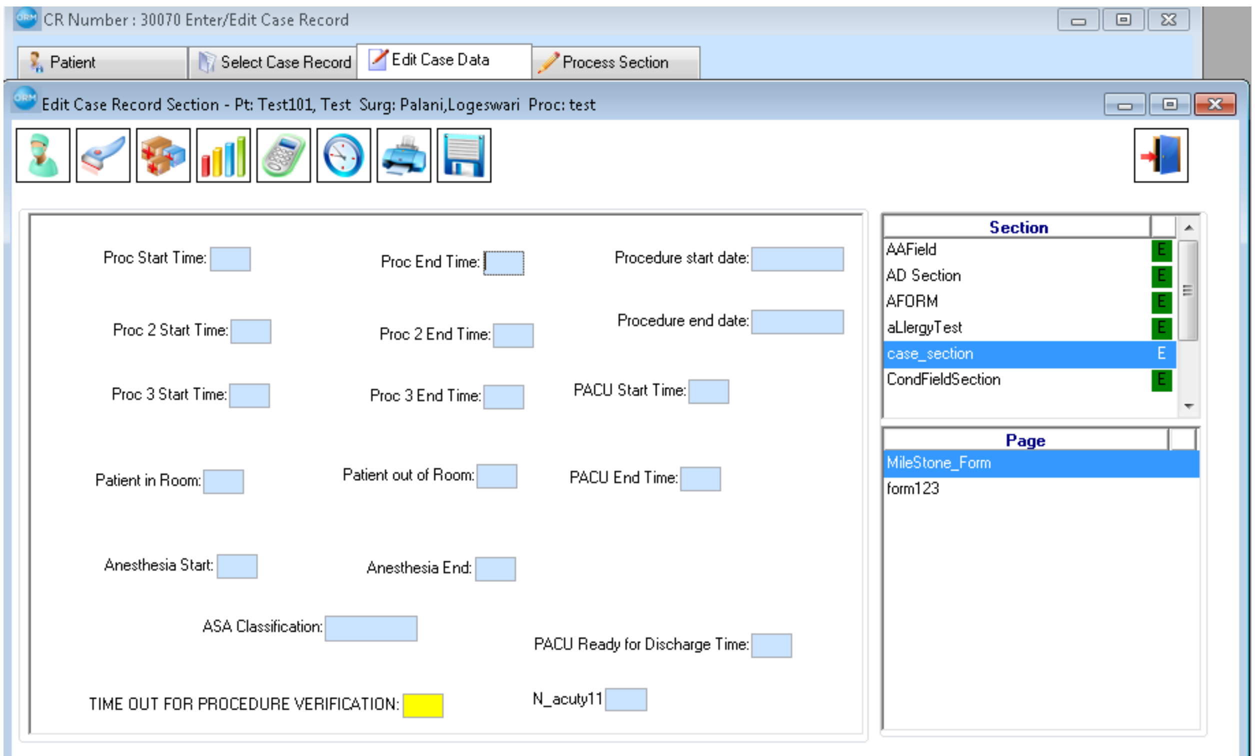
Remember that case record sections and pages are user defined. The parameters that control which sections and pages appear for particular facilities and procedure are found in user-defined screens.

See the *OR Manager Configuration Guide*: User Defined Screens.

Edit Case Record Sections

1. Double-click on the **Section** you want to edit (be careful not to double-click near the Open/Close radio buttons), or highlight the Section and click **Process Section**.

   The Edit Case Record Section screen opens with the first page of the selected section on the left side of the screen.



2. Click an item in the Page screen to select the page of the section to edit.

   The page you highlighted appears on the left side of the screen.
3. Click an item in the Section screen to select another section of the case record.

   The section you selected appears on the left side of the screen with the first page open and ready for editing.
4. Click on any of the fields in the section to enter, edit, or select any of the data input option within.

Note: Fields with red backgrounds are mandatory. Those with yellow backgrounds are recommended.

5. Click any of the buttons in the lower right to save, enter or edit other case-related data without having to return to the first screen of the **Edit Case Record** tab.

Note: If you have entered text in a section, and then decide that you want no text in it, press CTRL-A to select all, and then delete the text.

Automatic Log Out and Opening by Other User

Automatic log out of an inactive user is controlled by parameters set by administrators.

After the period shown in the message expires, a log on screen opens.

If the current user made edits to case record or case record patient data without saving and is automatically logged out, and then a second user attempts to log in, a message is displayed to inform the second user about the first user's data and to provide options.

Click **OK** to delete the first user's work and close OR Manager. Click **Cancel** to retain the first user's work and display the logon screen for the second user.

See *Required Fields* on page 69.

See *Edit Case Data Tab: Buttons* on page 160.

Buttons

Use this table to find more information on the buttons in the case records sections:

Button	Description
Print Case	Prints the case record in External Report, Case Record Upload Report, Standard Case Record Print Format, or Custom Case Record Print Format. If text is too long to fit in a field, the printout will display an ellipsis, which is three dots (...).
View Header	Brings up a quick reference screen to see the surgeon(s) and procedure(s) for the case.
Save	Save the data in the section.
Edit Milestones	Allows users to change milestone dates from a centralized location. Documenting future date/time Milestone Events is prohibited and presents a warning message if attempted.
Supplies	Opens the Exception Noting screen with only supplies exception noting enabled. You need to save and close the supplies before clicking **Implants**. See *Edit Case Data Tab: Exception Noting* on page 169.

Button	Description
Implants	Displays the Case Record Implants screen. You need to save and close the implants before clicking **Supplies** .
Billing History	Brings up the Billing History screen.
Cost Analysis	Brings up the Costs screen. *Edit Case Data Tab: Cost Analysis* on page 194.
Close	Closes the case record sections and takes you back to the main **Edit Case Data** tab.

Check Case Times

Check Case Times activates a screen that shows all of the milestone fields in all of the pages of the section you are working in, first ordered by form, then by tab. This allows you to enter all of these times from one place instead of having to find and enter them on each page of the section. Clicking the clock icon enters the current time.

Milestone Fields

Milestone fields are designated in the User Defined Screens dictionary. Milestone events are those date and time fields which are shared by TPA applications, for example patient in/out time. All milestone events are standard fields where data entered from OR Manager is copied to Anesthesia Manager. Typically every time milestone field is associated with date milestone field such as*time_ patient_in* and *date_patient_in.* The field names typically use the format *date_x* and *time_x* or *x_date* and *x_time* as corresponding date and time fields. It is these pairings that drive the inability to document future milestone events. See the *Dynamic Data Exchange Guide*.

Note: This is only applicable for Case Record level milestone events and only for those milestone which are used in dynamic data exchange. Any other user created milestone fields (non-standard, TPA Shared or Content Library) are not part of this enhancement.

Date/time documentation that occurs in the future is not allowed.

Changes to Milestone fields generate entries in the field-level audit trail.

Note: Fields you do not have access to on the section's pages are displayed but grayed out on the Milestone screen.

See the *OR Manager Configuration Guide*: User Defined Screens.

Using Word Processing Fields

Word processing (WP) fields in case records have some unique features. A parameter setting controls whether you edit them with the Picis Word Processor or with Microsoft Word. If you are using the Picis Word Processor, in addition to entering free form text, you can use the Canned Text menu to insert pre-written text into documents. The Canned Text menu is not available in Microsoft Word.

Case record WP documents can be set up in user-defined screens to be associated with particular body images or categories of canned text. However, a document need not be set up for canned text in advance; you can use the Canned Text menu from any document at any time to acquire canned text to use in your document or change the body images and/or canned text already associated with it.

Note: Microsoft Word macros need to be enabled in order to avoid potential error messages when opening these fields.

See the *OR Manager Configuration Guide*: Canned Text and Body Images.

Field Audit Trails

An audit trail is available on any user-defined field in a case record by using CTRL+CLICK on the field. A right-click on a field in a column on the Field Level Audit Trail screen brings up a menu.

- **Select Filter**: Lists only entries that contain the same data as the field you selected.
- **Undo Filter**: Removes all filters and displays audit trails for all the fields in the case record.

Edit Case Data Tab: Exception Noting

The Exception Noting screen displays the items, quantities, and charges from the preference cards and the Billing Rules associated with the case. You can modify items and quantities to reflect those actually used during the surgery.

The following sections discuss important exception noting tasks:

- *Modify a Non-Supply Item* on page 181
- *Add a Stock Item* on page 181
- *Modify a stock Item* on page 183
- *Delete a Stock Item* on page 183
- *Add a Tray/Pack/Kit* on page 184
- *Modify a Tray/Pack/Kit Stock Item* on page 185

- *Append a Preference Card* on page 192
- *Overwrite Existing Supplies* on page 192
- *Exception Noting and Billing* on page 192
- *Exception Noting Audit Trail* on page 193

The term "exception noting" describes the action by users of accessing this screen to add additional supplies or make edits to supply quantities used or supply charges (charge editable billing codes only).

Information derived from the exception noting process directly dictates the following:

• Supply Charges transmitted back to the billing system

• Supply Costs as tracked within OR Manager for case cost analysis

• Supply usage to support automated reordering within MM system

Failure to perform the exception noting accurately results in inaccuracies in all the above. It is therefore imperative that policies and procedures be established that ensure exception noting is performed accurately. This includes a comprehensive policy to audit the exception noting process. See *When to Use Exception Noting* on page 172 for a discussion of five cases in which exception noting is beneficial.

The exception noting process may be performed by two methods:

• Within the operating rooms during intra-operative charting

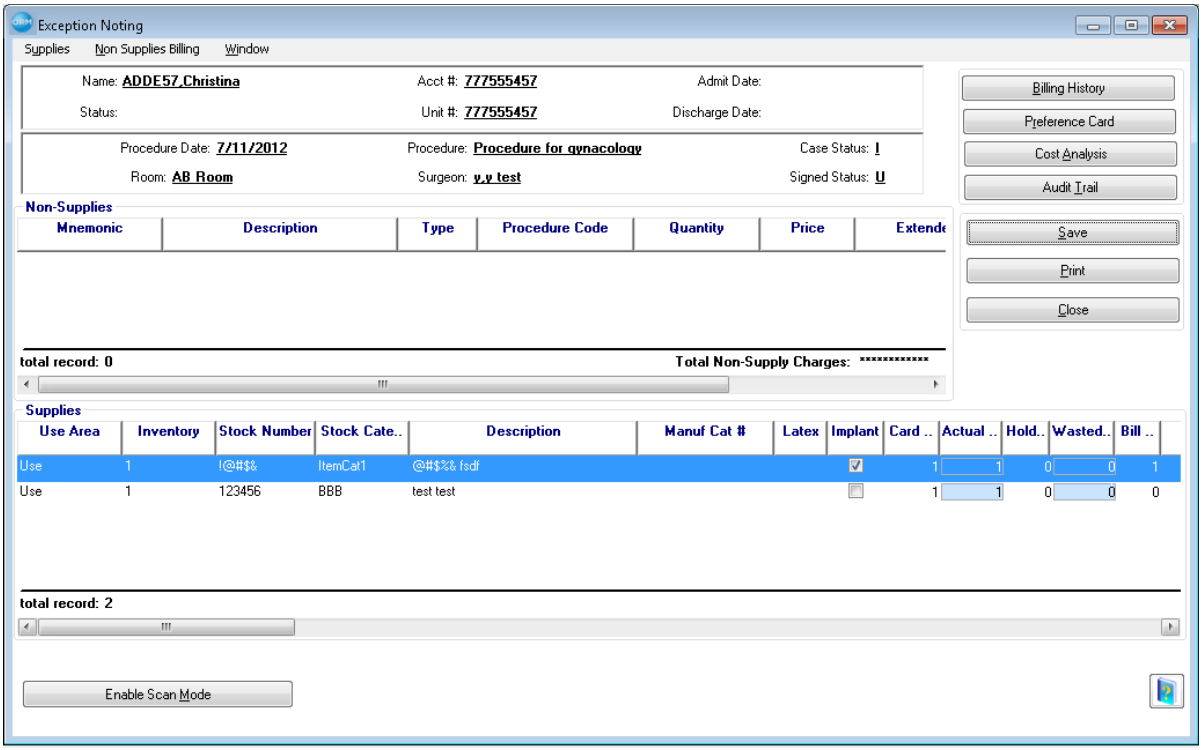
• Outside the operating rooms following intra-operative charting

See *Two Methods for Exception Noting* on page 173 for a discussion of the advantages and disadvantages of each method.

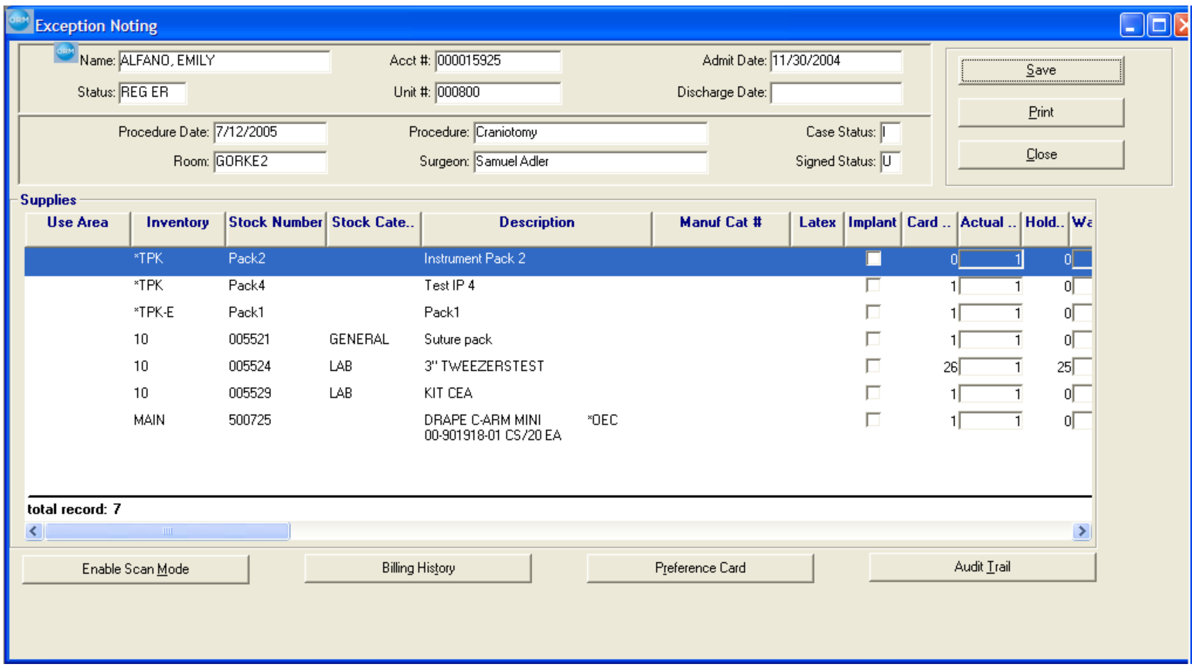
Note: Changes made in Exception Noting are one-time changes that are used only in the current case. Modifying entries in the Exception Noting screen does not change items, prices, and quantities in Billing Rules or Preference cards.

You can access the Exception Noting screen in one of three ways:

- Click **Supplies/Billing** on the Case Record screen. This allows you to do Exception Noting for supply items. The following image shows the screen in Scan Mode, which allows inventory items to be automatically documented in the case record by scanning the bar code on the item concerned.



- Click **Supplies** on a Case record Section screen. This option allows you to modify supply items only. This is the recommended method for nursing staff performing interoperative charting since it allows you to toggle back and forth between the Supply and Chart Data screens.



- Click **Implant** on a Case Record section or the Case Record screen. Only implantable supplies are shown.

When to Use Exception Noting

There are five circumstances in which you would use Exception Noting:

1. When you need to add, change, or delete items, prices, or quantities in supply items:
   - *Add a Stock Item* on page 181
   - *Modify a stock Item* on page 183
   - *Delete a Stock Item* on page 183
2. When the operation includes an implant, you must use Exception Noting to record the details of the implant, such as serial number, lot number, and so forth. See *Record an Implant* on page 187.
3. When an additional procedure, requiring an additional preference card, is added during the course of the surgery. See *Append a Preference Card* on page 192.
4. When a last-minute change in surgeon or procedure requires that the list of supply items be changed to those supplies on different preference cards. See *Overwrite Existing Supplies* on page 192.
5. When you need to modify prices or billing comments in Non-supply items. See *Modify a Non-Supply Item* on page 181.

The *OR Manager Configuration Guide* includes a method for avoiding errors that produce a cost of zero for new Stock/Item Dictionary entries that are made in exception noting later than the cost effective date. See the documentation in that guide for the Stock/Item Dictionary.

Two Methods for Exception Noting

The exception noting process can be performed by two methods:

- Within the operating rooms during intra-operative charting
- Outside the operating rooms following intra-operative charting

The following is a discussion on the advantages and disadvantages of each method.

Exception Noting done in the Operating Room

The exception noting process is performed in the OR Manager application on the personal computer in the operating room by the circulator as online intra-operative charting is being done. The circulator would therefore be responsible for the following:

- Verifying all supplies and quantities of supplies used.
- Correctly identifying in the system any additional supplies used.
- Identify any additional supplies on paper used that are not in the system (e.g. implants)
- Identifying billable supply items in the OR Manager system that should not be charged to the patient (e.g. supply contamination)

Another individual (after the case) is still responsible for the following:

- Auditing the supplies used
- Defining charges for charge editable supplies

Advantages:

- Saves time in overall process. The circulator performs clinical charting as well as the exception noting, usually saving time overall in the process as the exception noting does not need to be performed outside the room.
- Edit quantities. Supply quantities are easy to edit in the system.
- Finding additional supplies. Powerful tools to locate and find supplies in the database, providing the user knows the supply nomenclature

Disadvantages:

Time commitment to process. Although the system makes it easy to perform exception noting it still takes the user additional time to perform this action. It is especially difficult to perform exception noting on quick cases (BMT, IOL, Cysto, Minor procedures).

- Accuracy. Sometimes accuracy of exception noting is at risk when patient care is the primary concern.

- Difficult to audit. You can utilize an OR Manager audit trail to determine if exception noting was attempted but it is difficult to establish whether it was done accurately. It is unlikely circulators will recall the details of a certain case the following day. If the case is not audited immediately following the case it is likely that errors or questions regarding accuracy cannot be corrected.

Exception Noting in OR Manager done outside the Operating Room, following the case

The exception noting process is done on paper (usually on the OR Manager preference card worksheet) by the circulator as online intra-operative charting is being done. The filled out worksheets are delivered to a person responsible for the exception noting process. The actual exception noting process in the OR Manager system is done by another individual outside the operation room, usually as part of the overall case auditing process.

The circulator is responsible for the following:

- Verifying all supplies and quantities of supplies used
- Correctly identifying on paper additional supplies used
- Identify any additional supplies used on paper (e.g. implants)
- Identifying billable supply items that should not be charged to the patient (e.g. contamination)

Another individual (after the case) is still responsible for the following:

- Auditing the supplies used
- Editing supply quantities and entering additional supplies used
- Defining charges for charge editable supplies

Advantages:

- Time commitment. Supplies used can be indicated quickly on paper. Circulators can focus on patient care on short cases rather than performing online exception noting.
- Auditing. The paper copy used to exception note the supplies can be quickly audited and patterns can be established to determine shortcomings in the process or potential errors in what supplies were indicated as used.
- The exception noting can be done while performing standard case data audits. The exception noting, auditing, and defining charges (charge editable miscellaneous items) can all be performed as a rolled-up activity.

Disadvantage:

- Time to exception note. It takes a few additional hours (average 2-4 hours) a day to perform exception noting outside of the operating room. However, this can be rolled up into the standard day-to-day auditing process to minimize the additional time investment.

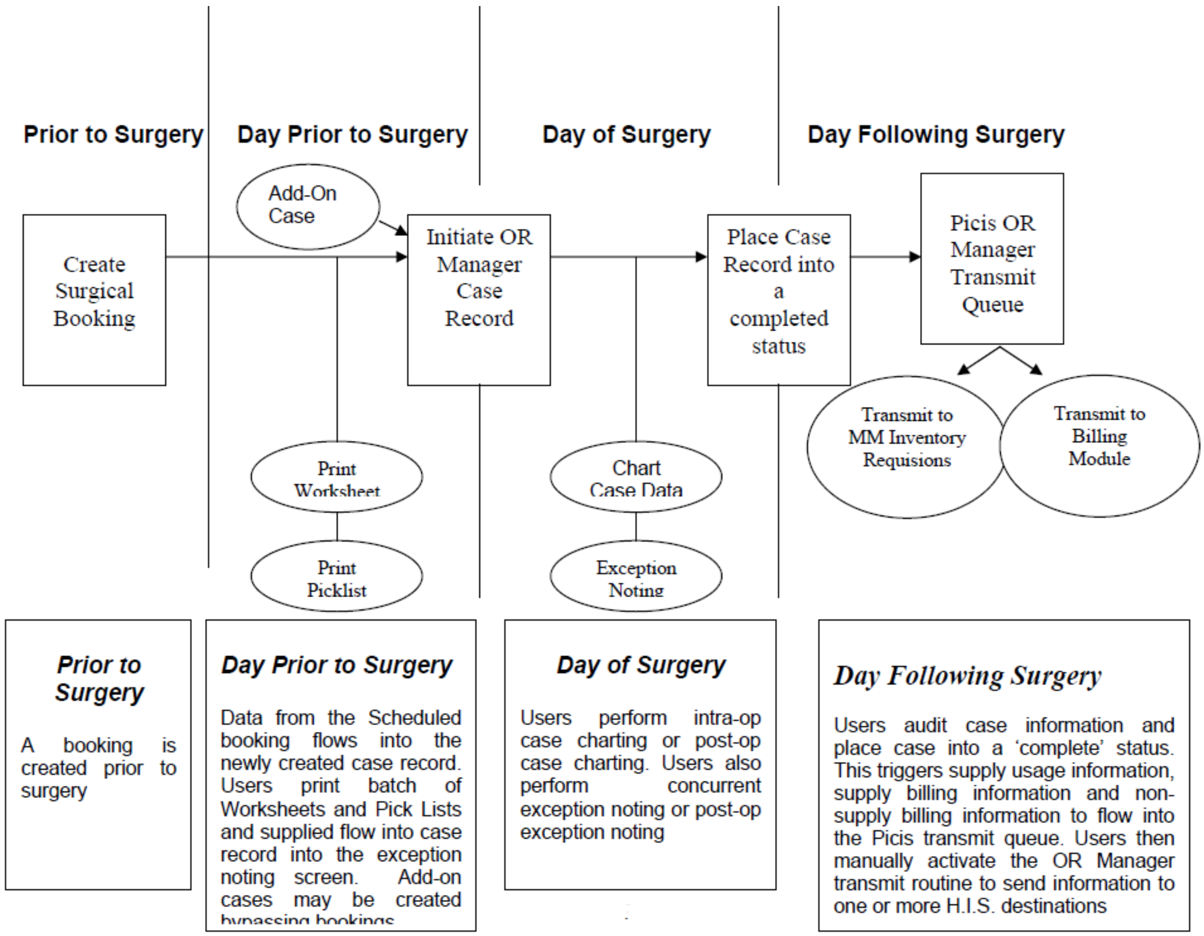
Recommendation

You should first consider the advantages of performing the exception noting process in OR Manager FOLLOWING the case by a dedicated individual. Many OR Manager sites roll up the tasks of exception noting, case auditing and defining charge editable charges in one action, one dedicated user goes into the case record in OR Manager just one time following the surgical episode to perform all the above actions. Still others roll the maintenance of preference cards into this process. If you choose to perform exception noting in the operating rooms another user needs to audit cases and enter charges (for charge editable items).

The greatest obstacle to implementing exception noting online in the operating room is the time needed to perform the action. Online nursing documentation requires circulators to dedicate more time to documentation of the surgical episode then they currently do. Additionally, online exception noting requires still more time to be dedicated to this entire process. Before considering online exception noting within the operating rooms, first make sure there is enough time to accurately perform online charting. If online charting itself is a challenge then it is more than likely an inaccurate exception noting process will result.

If it is determined that the time constraints in the operating room would be overcome and you wish to perform the exception noting in the operating rooms, make sure you can put into place comprehensive auditing procedures to ensure that the exception noting process is being performed accurately.

Case Record and Billing Cycle Diagram



Exception Noting Screen Tips

The following tips are offered to help you use Exception Noting:

- Contact the Picis Client Center for information on displaying the Cost Column.

  Displaying the **Cost** column is controlled by the parameter **display_cost_in_exception_noting**. See the *Security Manager Users Guide*.

- Depending on administrative settings, amounts over one may appear in the Case Record as multiple line entries for a single item. In such a case it is necessary to change individual item quantities to zero to prevent them from going to billing.
- Tray/Pack/Kits are displayed with the characters **TPK** in the Inventory column and are edited in the Edit Tray/Pack/Kit Stock screen. Messages distinguish between three cases of linking that

make a tray/pack/kit unacceptable; supplies not associated with facility, supplies with inventories not associated with assigned facility, and tray/pack/kit not associated with assigned facility.

> **Note:** You cannot edit an unauthorized tray/pack/kit in the Edit Tray/Pack/Kit Stock screen or the screen for viewing stock to make it acceptable.

- In Exception Noting, a Tray/Pack/Kit linked to Stock appears with either of the two indicators shown below. The linked stock can be viewed by double-clicking it.
  - **S**: Not set as Edit on Stock in the Tray/Pack/Kit Dictionary.
  - **ES**: Set as Edit on Stock in the Tray/Pack/Kit Dictionary. You can edit the linked stock by double-clicking it, but the editing does not change the linked stock that is transmitted to billing.
- The supplies are sorted in the following order when Sort by Worksheet is not set:
  - Use Area (Column is only visible when User-Defined table values exist).
  - Inventory.
  - Stock.
- In addition to the view of the Exception Noting screen shown in the previous graphic, two other views are available through selections in the **Window** menu:
  - **Supply View (Full Window)**: The screen shows more supplies because other screen panes are absent. Save, Close, Print, Billing History, Preference Card, Cost Analysis, Audit Trail.
  - **Non-Supply View (Full Window)**: The screen shows more non-supplies because other screen panes are absent.
- In the **Supplies** list, **Manuf Cat #**, **Description**, and **Stock Category** values help you identify the correct item in when many similar items are available.
- You can drag the boundaries of the column headings under **Supplies** with the left-hand mouse button to make changes in column width that are saved when you leave the screen. A right-click in the column headings under **Supplies** shows the **Restore Default Layout** option that returns the columns to their default widths.

Duplicate Items in Exception Noting

Exception Noting behavior concerning duplicate items depends on the setting of the parameter **duplicate_supply_prompt**. If the parameter has the value **N** and OR Manager retrieves a duplicate item, the user is allowed to edit an existing item.

The rest of this section discusses the case when the parameter **duplicate_supply_prompt** has the value **Y** and OR Manager retrieves multiple duplicate items and displays a screen listing the duplicate items. Duplicate Implants are also identified.

The screen allows the modification of the item, the entry of a new duplicate item, or canceling out of the screen. The screen prompts for the addition of a duplicate item with the following message:

Item Previously Added

Yes to Add Duplicate Item

No to Locate Selected Duplicate Item

Clicking **YES** displays the Enter/Edit screen with information to assist you in entering the duplicate item.

Clicking **NO** displays the existing supplies list with the highlighted entry selected.

Clicking **Cancel** in the case of a duplicate triggered in Scan Mode puts the focus back on the Scan prompt in the Exception Noting screen. Clicking **Cancel** in the case of a duplicate triggered by a manual entry brings the focus to the Stock prompt in the Enter/Edit Supply screen to allow a new entry.

A message appears in a special case in which adding or editing supplies would result in a duplicate entry that matches an existing entry in all of these three factors:

- Inventory.
- Stock Number.
- Use Area.

This message notifies you that the supply has already been documented for the selected Use Area. When this message appears, you can click Yes or No.

- **Yes**: You can continue editing the item as usual.
- **No**: Aborts the **Use Area** change and restores the value to the original entry.

An item can be scanned with a default Use Area, and if such an item already exists in the case with a different Use Area, the scanned item as considered a duplicate and adding a new entry is required.

The display of duplicate items in Exception Noting shows **Inventory**, **Stock Number**, and **Description**. They show **Use Area** if Use Areas are defined. Implants are unlike other items because their display includes **Comment**, which is necessary to distinguish between them because they are stored under the same **Inventory** and **Stock Number**.

Scan Mode Concepts

Clicking **Enable Scan Mode** allows inventory items to be automatically documented in the case record by scanning the bar code on the item concerned. The data from the scan specifies a search whose output is employed in the opportunity to add to the case either an item that is in the case or a new item that is not in the case.

Scan Mode is also available from the Case Record Implants screen, and it functions identically in both screens except that in the Case Record Implants screen, it relates only to implants. Two versions of the Exception Noting screen exist; one shown through editing Supplies/Billing on a case, and the other shown through editing Supplies/Billing on a Header Section. Scan Mode adds information only to a case record or log. It does not make an entry in a dictionary or table.

If the room in the case has a default inventory, that inventory is the first place that the software searches for a match to a scanned item. Default inventories for rooms are defined in the Facility-Inventory Mapping Dictionary.

See the *OR Manager Configuration Guide*: Inventory Dictionaries.

The following information is employed in searching the database.

Parameter Value	Type of Search
UPN1	bar code ID in UPN 1
UPN2	bar code ID in UPN 2
ITEM_NUMBER	item number
MANUF_CAT_NUM	manufacturer catalog number
VEND_CAT_NUM	vendor catalog number

Multiple items in the searched inventories with a value matching the scanned value are displayed, allowing you to choose one. If the search finds only one matching value, the item with that value is automatically selected. If no match occurs in the search, a message appears stating that the scanned item was not found.

The search can be reconfigured by assigning a value to the parameter cr_barcode_identifier to limit the search to one of the fields shown in the preceding table.

The bar code scanners used in scan mode operations are of the keyboard-emulator type. These scanners enter barcode information as though its source was a keyboard. The scanners should be configured to send `<Enter>` after a code, which allows the user to avoid making this entry.

Scan Mode Operations

When OR Manager is in Scan Mode, you cannot edit stock or implants from Enter/Edit screens. The term Scan Mode appears in the title bar of the Exception Noting screen and Case Record Implants screen.

1. Click **Enable Scan Mode** to allow inventory items to be automatically documented in the case record by scanning the bar code on the item concerned. OR Manager is ready for scanning when the background color of the Scan prompt changes from red to green and the cursor appears at the Scan field. Disable Scan Mode appears. Selecting **Disable Scan Mode** stops OR Manager from accepting data from a scanner.

   > **Note:** CONTROL-M is the quick key combination for starting or ending Scan Mode.

   In Scan Mode the lowest pane of the screen displays three fields:

   - **Inventory**: If the room in the case has a default inventory, that inventory populates this field, but it is not required.

- **Use Area**: An entry is required if Use Area values exist in a user-defined table. If Use Area values do not exist in a user-defined table, the field is suppressed. The Use Area is entered in the case record or log that receives the scan data.
- **Scan**: The first 40 characters of scanner input appear. You can type characters in the field to compensate for data that is difficult to read.

2. If an error message appears, click **OK** in the message screen to return to the screen in Scan Mode. The error message appears if the search finds only items that are inactive or in ineligible inventories, or if no database bar code ID matches the scanned ID.
3. If the search finds multiple items in the database, you are able to select one item. Click on the item to select it. Clicking **OK** or pressing ENTER opens an Enter/Edit screen with the highlighted item. Clicking **X** in the upper right-hand corner of the screen closes it without consequences.
4. If the screen described in the preceding step did not appear because the scanned item occurred only once in the case record, the item is selected for edit, and its quantity is shown with a yellow background to indicate that an existing entry is under edit. The behavior in adding, editing, and duplicating items has two modes depending on the setting of the **duplicate_supply_prompt** parameter. If the parameter has the value **Y** the following characteristics prevail:
   - The Enter/Edit screen gives you the opportunity to add or edit an item that may or may not be in the case, and for implants a duplicate function is allowed. The Enter/Edit screen has the Inventory and Stock Number data filled in with the scan data. The Enter/Edit screen allows editing of an item that is already in the case. The Enter/Edit screen shows the quantity of an item that is already in the case. If the item already exists on the case in quantity greater than one, the first instance on the case appears for editing.
   - Implantable items that already exist in the case present the opportunity to select an existing implant, edit an existing implant, or duplicate an existing implant. Pressing the ENTER key or clicking **OK** selects an existing implant. The screens for editing and duplicating an implant are distinct. The default scan values are ignored in editing. The **Default Use Area** is applied in duplicating an implant.

   If the **duplicate_supply_prompt** parameter has the value **N** the following characteristics prevail:
   - In scan mode you see a display of the duplicate prompt for implantable items, if the item is already on the case. This allows you to choose to add a new item entry or edit existing item quantities.
   - In manual entry mode, there is no prompt, and you see the screen for adding both implant and non-implantable items.
5. Scan Mode terminates when you close the Exception Noting screen displayed by editing Supplies/Billing on a case, but this is not true for the Case Record Implants screen and the Exception Noting screen displayed by editing Supplies/Billing through a header section. Consequently if either of the last two mentioned screens is open in Scan Mode, and you open another screen and put the focus on an editable field, scan data can enter the editable field.

See *Edit Case Data Tab* on page 159.

See *Edit Case Data Tab: Filling Out Sections* on page 165.

See *The Edit Tray/Pack/Kit Stock Screen* on page 185.

See the *Security Manager Users Guide*.

Modify a Non-Supply Item

Note: You can only change prices on items that are specified as Charge Editable in the Billing Procedure Codes dictionary and if you have the proper security privileges.

1. Select **Non-Supplies Billing > Modify Non-Supply** (or select **Modify Non-Supply** from the right-click menu).

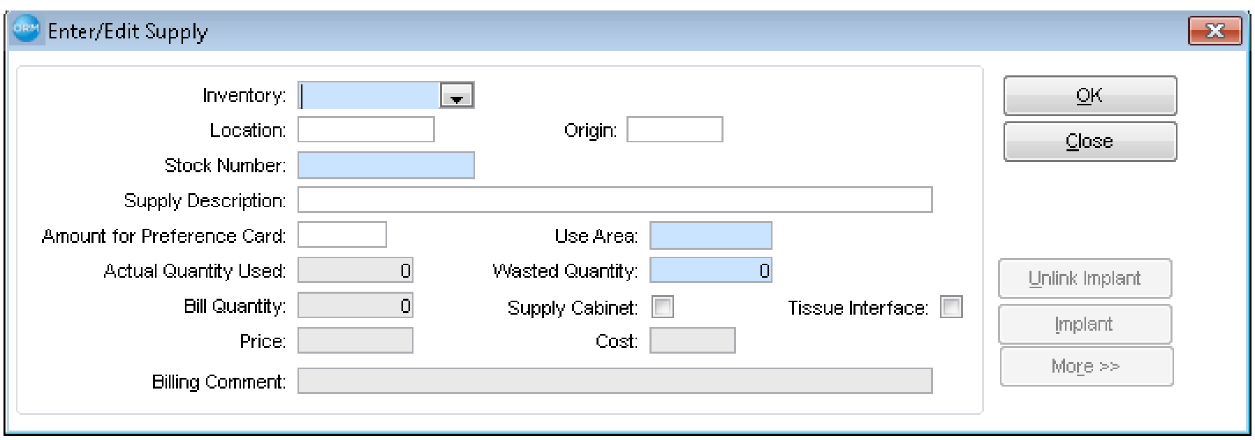
   A screen opens that allows you to enter/edit price and comments.
2. Click **OK** to save changes.

Note: You cannot add or delete non-supply items in the Exception Noting screen.

Add a Stock Item

1. Select **Supplies > Add Stock Item** or **Add Stock Item** from the right-click menu.

   The Enter/Edit Supply screen opens.



2. Select an Inventory and Bin Location, if applicable.
3. Select a Stock Number. (For more search options, see *Add a Stock Item* above.)

   The Supply Description and other information from the inventory fills into the corresponding fields.
4. Enter the Amount Used and Amount Wasted.

   Comment opens when you tab out of **Amount Wasted**.
5. Select a **Use Area** if values exist in the user-defined table. A selection is required if this prompt appears.

6. (Optional) **Cost** may also appear. It may be read-only, depending on administrative settings. If you set a cost in this field, it is used in billing calculations for the case. If an item's cost is controlled by a Billing Rule that applies a markup, the markup is applied to the edited cost.
7. **Price** may be editable, depending on Billing Code settings, but you should not change the value except in unusual circumstances.
8. (optional) Enter a Billing **Comment**. You can add an implant comment even if the item is not an implant.

> **Note:** If your billing interface supports it, this Billing Comment appears in your billing system.

9. If the item is an implant, and you are using the OR Manager Implant dictionary, you must use Exception Noting to record it.
   - If **Implant** is active, the supply item has active entries in the Implant dictionary. Click **Implant** to select the correct implant attributes.
   - If **Implant** is not active, you must enter the information manually using **More>>**.
   - **More>>** shows the implant type. You can select a value from a drop-down menu without affecting its value in the dictionary. You can select a value for **Implant Disposition** from a drop-down menu. You can type a **Disposition Comment**. Setting the value in either of these fields causes the implant to lose its **Active** status, and that status can be restored only by manually resetting it. If you need to enter a **Storage Temperature**, use the format 101 F or the format 35 C. See *Record an Implant* on page 187.
10. Click **OK** to save.

Stock Item Lookup Methods

In addition to looking up a stock item by Stock Number, you can use the following symbols plus a few characters or numbers in an associated field in the item you want to search for stock:

First Entry	Second Entry	Typo of Search
*	*some characters or numbers*	the description
!		manufacturer catalog number
@		vendor order number
$		item common name
^		vendor
#		vendor catalog number

Entering '^hew' would yield all of the stock items with 'hew' as their vendors, such as 'Hewlett Packard' or 'Smith and Nephew.'

Modify a stock Item

Depending on administrative settings, amounts over one may appear in the Case Record as multiple line entries for a single item. In such a case it is necessary to change individual item quantities to zero to prevent them from going to billing.

1. To change the **Actual Quantity** or **Wasted Quantity**, highlight the supply item you want to modify and enter the new **Actual Quantity** and/or **Wasted Quantity**.

   The **Bill Quantity** equals the **Actual Quantity** minus the **Wasted Quantity.**
2. (optional) **Cost** may appear. It may be read-only, depending on administrative settings. If you set a cost in this field, it is used in billing calculations for the case. If an item's cost is controlled by a Billing Rule that applies a markup, the markup is applied to the edited cost.
3. To enter a comment, or to edit more extensive item information, such as vendor or serial number, double-click on the supply item.

   The Enter/Edit Supply Screen Opens
4. Tab through the **Amount Used** and **Amount Wasted**, changing quantities as desired.

   The **Amount to Bill for** changes to equal the **Amount Used** minus the **Amount Wasted** and **Comment** opens.

   > **Note:** You can change the price only if the item is not a Patient Issue and the **Charge Editable** box in the associated Billing Procedure Code dictionary entry is checked. There are no comments for tray/pack/kits.
5. If the item is an implant, you must use Exception Noting to record it.

   If **Implant** is active, the supply item is in the Implant dictionary. Click **Implant** to select the correct implant item.
   - If **Implant** is grayed out, you must enter the information manually using **More>>**. You can select an **Implant Type** value from a drop-down menu without affecting its value in the dictionary. You can select a value for **Implant Disposition** from a drop-down menu. You can type a **Disposition Comment**. Setting a value for either of these fields makes the implant lose its active status, and you can reset that status only by a manual operation. If you need to enter a Storage Temperature, use the format 101 F or the format 35 C.
6. Click **OK** to save.

See *Record an Implant* on page 187.

See the *OR Manager Configuration Guide*: Preference Card Dictionary.

Delete a Stock Item

- Select **Supplies > Delete Stock Item** or select **Delete Stock Item** on the right-click menu.

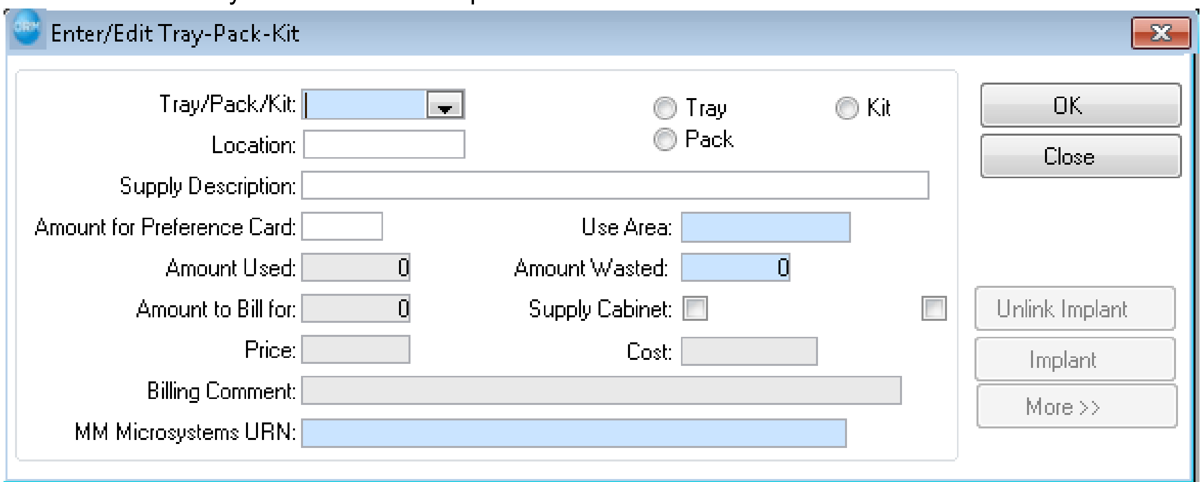
  The Stock Item is deleted.

> **Note:** Stock items are deleted instantly, without a confirmation. However, the deletion is not final until you save the screen, so if you accidentally delete an item, exit the screen without saving it.

Add a Tray/Pack/Kit

1. Select **Supplies > Add Tray/Pack/Kit** or **Add Tray/Pack/Kit** from the right-click menu. Only authorized tray/pack/kits appear.

   The Enter/Edit Tray/Pack/Kit screen opens.



2. Select a **Tray/Pack/Kit**.
3. Enter Tray/Pack/Kit Quantity, Use Area, and Actual Quantity.

   Note: If you are viewing a Tray/Pack/Kit linked to Stock, the Bill Code of the linked stock is displayed, not the Bill Code of the Tray/Pack/Kit. The Stock Number and Description appear as read-only data. (In the Billing History screen, the column Linked with TPK indicates Stock linked to Tray/Pack/Kits.)

4. Select a **Use Area** if values exist in the user-defined table. A selection is required if this prompt appears.

   Note: When a Tray/Pack/Kit is linked to Stock, the Stock is assigned the Use Area of the Tray/Pack/Kit.

5. (optional) **Cost** may appear. It may be read-only, depending on administrative settings. If you set a cost in this field, it is used in billing calculations for the case. You may be able to edit the cost of stocks in the tray/pack/kit. Billing Rules that apply markups are effective for the edited tray/pack/kit cost or the edited costs of stocks in the tray/pack/kit.

   See the *OR Manager Configuration Guide*: Preference Card Supporting Dictionaries.

6. **More>>** is available to change detailed information such as Lot Number. Two fields for text entry are also present.
7. Click **OK** to save.

   The Enter/Edit Tray/Pack/Kit screen closes.

   The software inserts the new entry in the Exception Noting screen.

If the Actual Quantity exceeds 1, it is recorded as individual line items that each have a quantity of one.

8. To edit one of the Tray/Pack/Kit items you have created, right-click **Modify Stock Items**.

   The Enter/Edit Tray/Pack/Kit screen opens.

The Edit Tray/Pack/Kit Stock Screen

Tray/Pack/Kits that are marked with **E** or **ES** in the Inventory column in the Case Record are edited in a special Tray/Pack/Kit Stock screen. A Tray/Pack/Kit linked to Stock appears with either of the two indicators shown below. The linked stock can be viewed by double-clicking. You cannot edit an unauthorized tray/pack/kit in this screen to make it authorized.

- **ES** — Set as **Edit on Stock** in the Tray/Pack/Kit Dictionary. You can edit the linked stock by double-clicking, but the editing does not change the linked stock that is transmitted to billing.
- **S** — Not set as **Edit on Stock** in the Tray/Pack/Kit Dictionary

In the Tray/Pack/Kit Stock screen, you can change the following data:

- Actual quantity.
- Wasted quantity.
- Use area.

Modify a Tray/Pack/Kit Stock Item

1. Display the Tray/Pack/Kit Stock screen by doing one of the following in the Exception Noting screen:
   - Double-click the record marked with **E** or **ES**.
   - Right-click the record marked with **E** or **ES** and select **Edit Tray/Pack/Kit Stock**.
2. To change the **Actual Quantity** or **Wasted Quantity**, Highlight the supply item you want to modify and enter the new **Actual Quantity**and/or**Wasted Quantity**.

   The *Bill Quantity* equals the *Actual Quantity* minus the *Wasted Quantity*.

   Note: The **Hold Quantity** comes from the Preference Card dictionary and can be edited in Exception Noting when adding or modifying an item. If Charge for Individual Stocks is selected for the Tray/Pack/Kit in the Tray/Pack/Kit Dictionary, the modified quantities will be used for billing, but otherwise the modified quantities are stored for reporting purposes. If Charge for Individual Stocks applies to the selected Tray/Pack/Kit, the message above the table of Tray/Pack/Kits announces that fact. If the alternate setting applies, the message above the table of Tray/Pack/Kits states: Tray/Pack/Kit has its own bill code. Hence any modification to **Stock Qty** will not be sent to billing.

3. (optional) A **Cost** field may appear. It may be read-only, depending on administrative settings. If you set a cost in this field, it will be used in billing calculations for the case. You may be able to

edit the cost of stocks in the Tray/Pack/Kit. Billing Rules that apply markups will be effective for the edited tray/pack/kit cost or the edited costs of stocks in the tray/pack/kit.

For more information on the preceding topic, see the following chapter in the *OR Manager Configuration Guide*: Preference Card Supporting Dictionaries.

4. To enter a comment, or to edit more extensive item information, display the Enter/Edit Supply screen by one of the following methods:
   - Double-click a Tray/Pack/Kit.
   - Right-click on a Tray/Pack/Kit and select Modify Stock.
   - Right-click on a Tray/Pack/Kit and select View Stock.
   - If the Tray/Pack/Kit is linked to Stock, the **Linked Stock** data appears at the bottom of the screen. Modifying this information does not change the data sent to billing.

> **Note:** If you are viewing a Tray/Pack/Kit linked to Stock, the Bill Code of the linked stock is displayed, not the Bill Code of the Tray/Pack/Kit. The **Stock Number** and **Description** appear as read-only data. (In the Billing History screen, the column **Linked with TPK** indicates Stock linked to Tray/Pack/Kits.)

5. Tab through the **Amount Used**and**Amount Wasted**, changing quantities as desired.

   The *Amount to Bill for* changes to equal the *Amount Used* minus the *Amount Wasted* and the *Comment* box appears.

> **Note:** You can change the price only if the item is **Patient Issue** and the **Charge Editable** box in the associated Billing Procedure Code dictionary entry is checked. There are no comments for tray/pack/kits.

6. (Optional) Edit the **Use Area** selection.
7. The **More >>** button is available to change detailed information such as **Lot Number**. Two fields for text entry are also present.
8. If the item is an implant, you must use Exception Noting to record it.

   If the **Implant** button is active, the supply item is in the Implant dictionary. Click **Implant** to select the correct implant item.
   - If the **Implant** button is grayed out, you must enter the information manually using the **More>>** button. You can select a value for **Implant Type** from a drop-down menu without affecting its value in the dictionary. You can select a value for **Implant Disposition** from a drop-down menu. You can type a **Disposition Comment**. Entering a value for either of these fields removes the **Active** status of an implant, and that status can be restored only by a manual operation. If you need to enter a Storage Temperature, use the format 101 F or the format 35 C. For more information about the fields in the Enter/Edit Supply screen extended for implants, see *Item not in Implant Dictionary* on page 190.
9. The **Price** field may be editable, depending on **Billing Code** settings, but you should not change the value except in unusual circumstances.
10. Click **OK** to save.

See *Record an Implant* below.

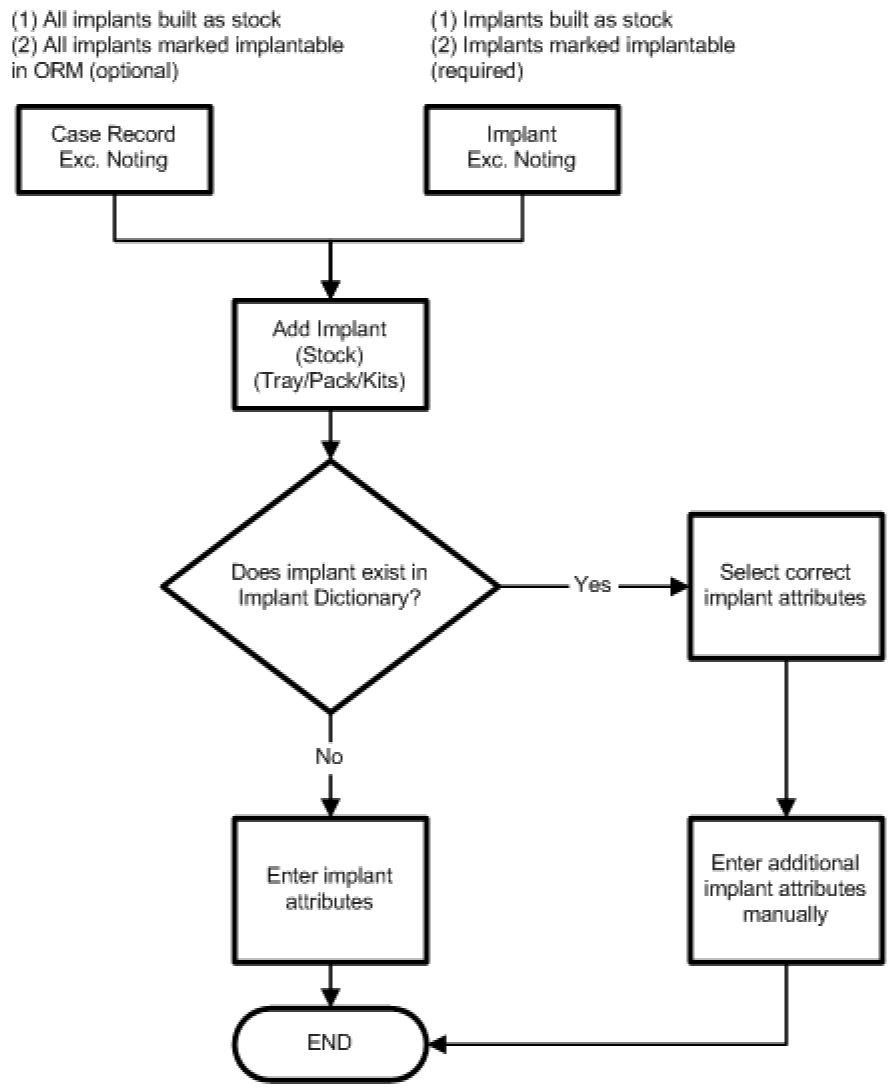
See the *OR Manager Configuration Guide*: Preference Card Dictionary.

Record an Implant

It is recommended that you specify stock items and tray/pack/kits as implantable, and that you add these in exception noting by selecting the Implant button shown in *Edit Case Data Tab: Buttons* on page 160.

See the *OR Manager Configuration Guide*: Preference Card Supporting Dictionaries.

Implant Diagram: Charting Implants



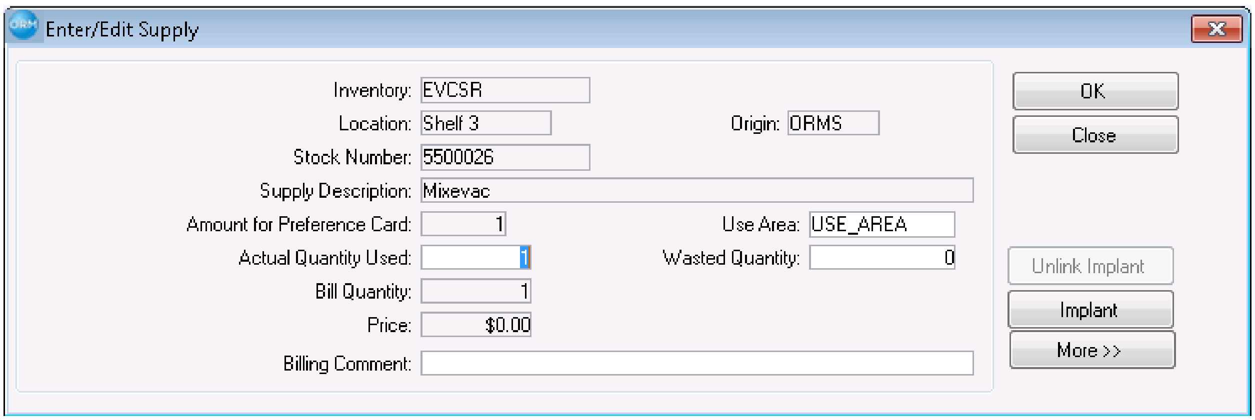
This section discusses the two scenarios you may encounter when recording implants:

- When the implant item is in the Implant dictionary.
- When the implant item is not in the Implant dictionary.

Note: These steps refer to the Enter/Edit Supply screen used in Exception Noting.

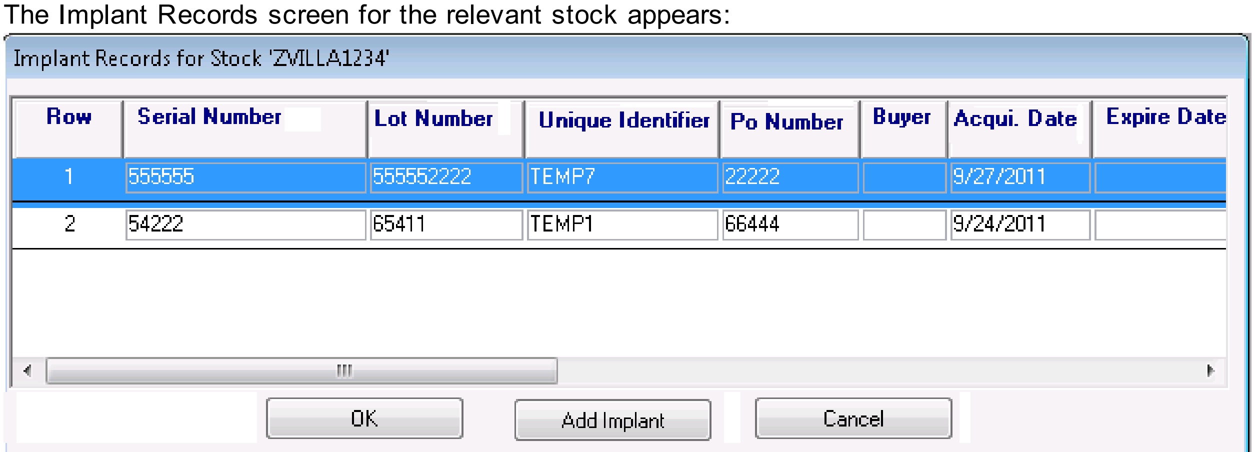
Item in Implant Dictionary

When **Implant** on the Enter/Edit Supply screen is active, the implant items are in the Implant dictionary:



1. Click **Implant**.

   The Implant Records screen for the relevant stock appears:



2. Click on the row whose serial number matches the implant that you are using for the procedure. If you have permissions to work in the Implant Dictionary, **Add Implant** appears at the bottom of the Implant Records screen. If you do not see the needed implant in the Implant Records screen, you can click Add Implant to open the Stock Implant Dictionary where you can create the needed implant. After you have saved the implant in the Stock Implant Dictionary and closed its screen, the Implant Records screen opens showing the newly created implant.
3. If you clicked on a row in the implant Records screen as suggested in the previous step, click **OK**.

The Enter/Edit Supply screen for the implant appears. See *Item not in Implant Dictionary* on the next page.

Note: The **Vendor** and **Catalog Number** values are defaulted in from the Stock dictionary.

4. Enter additional implant information as necessary.
5. Click **OK**.

   The implant information is recorded in the case record.

Item not in Implant Dictionary

It is recommended that all implants should be entered in the Stock Implant Dictionary before they are used on a case. The Stock Implant Dictionary is described in the *OR Manager Configuration Guide*. If you click **Implant** in the Enter/Edit Supply screen and display the Implant Record screen with the active **Add Implant** under the list, you have permission to create a new implant in the Stock Implant Dictionary.

You need to enter the information for an implant manually in the extended Enter/Edit Supply screen in the following circumstances if you cannot work in the Stock Implant Dictionary:

- **Implant** on the Enter/Edit Supply screen is not active.
- You clicked **Implant** on the Enter/Edit Supply screen and did not find the item on the Implant List.
- You did not enter the implant in Scan Mode when you clicked **Implant**.

Enter an implant manually

1. Click **More>>** to enter the implant information manually. The Enter/Edit Supply screen extends for input of implant data. Note that the **Vendor** and **Catalog Number** values are defaulted in from the Stock dictionary. The documentation for the tissue management system, TIMS, which is in the *OR Manager Configuration Guide*, discusses data that is copied from the Enter/Edit Supply screen to the Stock Implant Dictionary and vice versa. That guide also discusses the Tissue Preparation screen which is displayed by clicking **Preparation**. The Tissue Preparation screen is where you can enter details concerning antibiotics and solutions. The *OR Manager Configuration Guide* discusses differences in documenting antibiotics and solutions at different sites.

   The following list of fields on the extended Enter/Edit Supply screen includes comments for some fields with special behavior or less obvious meanings.

- **Lot Number**: Number of the lot from which the implant was taken. This data is editable in the Stock Implant Dictionary and in exception noting, but an edit in exception noting does not automatically flow to the Stock Implant Dictionary.
- **Serial Number**: Number assigned to identify the particular implant. This data is editable in the Stock Implant Dictionary and in exception noting, but an edit in exception noting does not automatically flow to the Stock Implant Dictionary.
- **Manufacturer**: The implant manufacturer may have a value different from the stock manufacturer.

- **Vendor**: Vendor of the implant.
- **Purchase Order Number**: Order number for this implant.
- **Site**: Characteristics of sites in relation to TIMS behavior is discussed in the *OR Manager Configuration Guide*.
- **Storage Location**: This field is available for implants and tissue type records.
- **Implant Disposition**: Assigning a value to this in a case record prevents it from being edited in the Stock Implant Dictionary without a manual reversal of the data. This value is copied to the Stock Implant Dictionary. Changing the value of this field creates an assumption that the implant has been used. If the value of this field is changed in exception noting, the implant acquires an inactive status in the Implant Dictionary.
- **Disposition Comment**: Assigning a value to this in a case record prevents it from being edited in the Stock Implant Dictionary without a manual reversal of the data. This value is copied to the Stock Implant Dictionary. Changing the value of this field creates an assumption that the implant has been used.
- **Storage Temperature**: If you need to enter a Storage Temperature, use the format 101 F or the format 35 C.
- **Catalog Number**: The implant catalog number may have a value different from the manufacturer's catalog number for stock.
- **Expiration Date**: Entering an implant manually in exception noting with this piece of data results in its non-inclusion in the Implant Expiration Report.
- **Acquisition Date**: Date that implant was acquired.
- **Buyer**: Person or account responsible for implant purchase.
- **SMDA**: Safe Medical Device Act. You can select **Yes**, **No**, or **N/A**.
- **Implant Type**: You can select a value for **Implant Type** from a drop-down menu without affecting its value in the Stock Implant Dictionary. This value indicates whether the implant is tissue, which causes tissue fields to display. The status as tissue can be at the Stock Dictionary level, but such an assignment can be changed in exception noting.
- **Implant Comment**: Free text comment for the implant.
- **Unique ID**: Each tissue has a unique identifier, regardless of whether TIMS is turned on. TIMS deals only with items that have unique identifiers to limit its scope to tissue.
- **Tissue Size**: 50 characters are available. This is copied to the Stock Implant Dictionary.
- **Tissue Source**: This is a value such as "Donor." This is copied to the Stock Implant Dictionary.
- **Responsible RN**: The Responsible RN field defaults to the user logged into application, but allows the user to to make a selection from a drop-down and change the value.The responsible registered nurse must be a valid user in Security Manager. If an invalid user is sent via the TIMS interface, the value becomes UNKNOWN.

- **Received in OR by**: This field is not copied to the Stock Implant Dictionary, nor is the similar field in the Stock Implant Dictionary copied to exception noting data because the meaning of the two fields is different. In the Stock Implant Dictionary "Received by" indicates the person receiving tissue at the loading station, while in Exception Noting, it indicates the personnel receiving tissue in the OR room.

2. Enter the implant information, then click **OK**.

   The implant is recorded in the case record and you are returned to the Enter/Edit Supply screen.

Append a Preference Card

1. Click **Preference Card**.
2. Select **Append**.
3. In the box, select a preference card.
4. Click **OK**.
5. Click **Yes** to append the preference card.

Overwrite Existing Supplies

1. Click **Preference Card**.

   The Select a Preference Card screen opens.
2. Select **OverWrite**.
3. Select a preference card from the drop-down list.
4. Click **OK**.
5. Click **Yes** to delete all existing supply items and substitute supply items and quantities from the new preference card.

Exception Noting and Billing

The Exception Noting screen shows the following quantity fields for each supply item:

Card Qty: From the preference card (not editable). The number of items expected to be used plus the number of items on hold.

Actual Qty: The total number of items actually used and wasted. Cannot be less than Wasted Qty.

Hold Qty: From the preference card (not editable). These items are picked but held in reserve.

Wasted Qty: The number of items wasted. Cannot be greater than Actual Qty.

Bill Qty: Not editable. Value adjusts automatically according to a system setting: *either* equals the Actual Qty (meaning that used and wasted items are billed for) *or* equals Actual Qty - Wasted Qty (meaning that only used items are billed for).

Example:

Card Qty	Actual Qty	Hold Qty	Wasted Qty	Bill Qty
15	7	10	2	7

Card Qty is 15 and Hold Qty is 10. This means that 5 items were expected to be used in this procedure. In reality, 5 items were used but 2 items were wasted. The user has therefore entered "2" for Wasted Qty and "7"for Actual Qty. As for Bill Qty, the hospital setting is for Bill Qty to equal Actual Qty (wasted items are included in the bill).

Note that the three Quantity fields on the Exception Noting screen correspond to the Amount fields in the Enter/Edit Supply screen as follows:

Exception Noting screen fields	Enter/Edit Supply screen fields
Actual Quantity	Amount Used
Wasted Quantity	Amount Wasted
Bill Quantity	Amount to Bill for

Exception Noting Audit Trail

You can view and print the Exception Noting Audit Trail by clicking the **Audit Trail** button on the Exception Noting screen. This feature has two levels of audit trail:

- **High Level** tracks the following basic activity:
  - **Edit Supplies** tracks changes to supply items.
  - **View Supplies** tracks users who entered the Exception Noting screen but made no changes.
  - **Add Preference Card** tracks preference card additions.
  - **Overwrite Preference Card** tracks overwritten preference cards.
  - **Print Supplies** tracks printing of the Case Record Supplies and Billing List.
- **Detailed Auditing** is in addition to the High Level auditing shown above. Activity tracked by detailed auditing includes the following:
  - Supplies initially added when case is started.
  - Supplies added when ‘Preference Card’ is added (append supplies).
  - Supplies added when ‘Preference Card’ is overwritten (overwrite supplies).
  - Add Stock Item.
  - Add Tray/Pack/Kit.
  - Modify Stock Item.
  - Modify Tray/Pack/Kit.

- Delete Stock Item.
- Delete Tray/Pack/Kit.
- View Stock Item.
- View Stock Image.

High level auditing for Exception Noting is standard. Detailed auditing is set by a parameter.

Field Audits in Bookings and Case Records

If administrators have set permissions for you, you may see the audit icon immediately in front of the label for a field in a booking or case record.

This icon indicates that the field value was changed and saved more than once. You can click the audit icon once to see the Field Level Audit Trail screen for the the field.

For multiline fields the audit icon appears in the upper left-hand corner of the group of lines. The audit icon for these fields can indicate two changes and saves of the same data, but it can also appear where two lines were filled out at the same time.

You cannot see the Field Level Audit Trail for an unsaved booking, and clicking the audit icon on an unsaved booking displays a message stating this. The Field Level Audit Trail for a patient on an unsaved booking can be displayed from the Patient Form, but it displays only the patient name, and all of the other fields are blank.

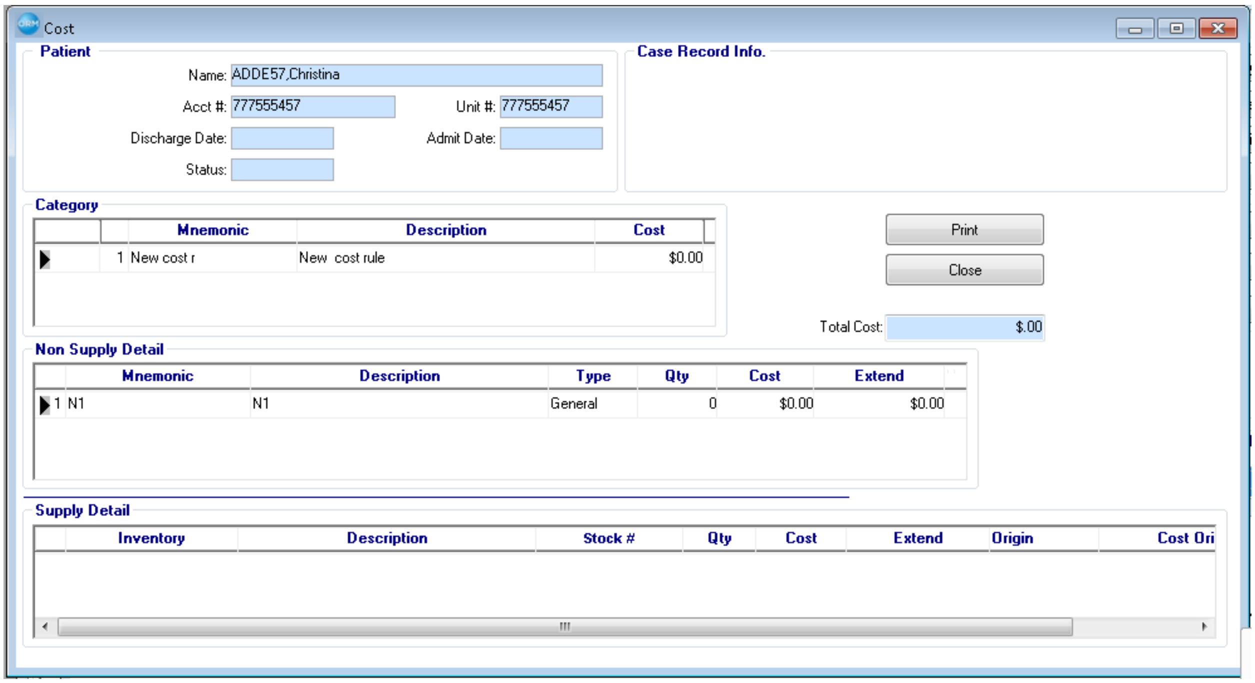
If you open the Case Record Patient form without selecting a case record, the Field Level Audit Trail screen shows only the patient name, and other fields are blank.

If two users are working with fields in the same form, changes made by one user are not shown by updating the audit data or making the icon visible for the other user until the other user leaves the form and returns to it.

Edit Case Data Tab: Cost Analysis

The Cost screen gives you a breakdown, as well as totals, of costs for all supply and user defined non-supply items used in the surgery.

You get to the Cost screen by clicking **Cost Analysis** on the **Edit Case Data** tab of the Case Record screen, or by clicking **Cost Analysis** in the Exception Noting screen.



Note: Supply items with zero cost do not display.

Editing Costs and Quantities

None of the fields on this screen are editable.

- To change costs, you edit them in the Cost Rules dictionary (non-supply items) or the Stock dictionary (supply items).
- To change quantities, use the Exception Noting screen, which you open from **Supplies/Billing** on the Enter/Edit Case Record screen.

Field Descriptions

The three sections are Category, Non-Supply Detail, and Supply Detail.

- The information in the Category and Non-Supply Detail section comes from the Cost Rules dictionary and refers to non-supply costs, such as room, surgeon, and equipment time.
- **Category** provides totals by cost categories that are assigned to non-supply items in the Cost Rules dictionary.
  - Non-Supply Detail lists the costs of individual non supply items within the Category.
  - The information under Supply Detail comes from the **Item Cost** field in the Stock dictionary.

Click **Print** to produce a report showing all of the cost items for the case.

See the *OR Manager Configuration Guide*: Billing Dictionaries, Inventory Dictionaries.

Edit Case Data Tab: Vital Statistics

The Vital Statistics screen is accessible from the **Edit Case Data** tab, provides a convenient place to record the patient's vital statistics, and automatically graphs them on the screen at the same time.

Two important tasks for vital statistics are discussed in the following sections:

- *Add Vital Statistics*
- *Edit an entry*

Add Vital Statistics

1. On the Case Record screen **Edit Case Data** tab, click the **Vital Statistics**.

   The Vital Statistics screen appears:
2. Click **Add**.

   A new entry is created. Note that the current date, time, and your login initials, as well as the Vital Statistics from the previous entry also default. At this point, the graph shows only the selected entry.
3. Edit the fields in the new entry that you want change from the previous readings.
4. Click **Save**.

   The entry is saved and the graph is automatically updated to reflect the changes.

Edit an entry

1. Select the entry you want to change by clicking on it in the entry list at the bottom of the screen, or by clicking on its column in the graph.

   The entry is highlighted in the list at the bottom of the screen.
2. Double-click on the selected entry or click **Edit**.

   The graph displays only the highlighted entry and the entry is now available for editing.
3. Edit the fields in the entry that you want change.

   Note: Exit out of edit mode at anytime and restore the original data by clicking **View**.
4. Click **Save**.

   The entry is saved and the graph is automatically updated to reflect the changes.

Selecting Statistics to View

To see or hide any of the statistics on the graph, select or clear the boxes next to the corresponding Vital Statistic.

Changing Graph Scale

The default graph scale is 8, meaning that you see up to eight vital statistics entries on the screen at one time. If your time interval for taking statistics is 15 minutes, for example, a setting of 8 shows up to two hours worth of data on the graph.

You can change the scale when the graph is in view mode by editing the Scale box in the upper left corner of the screen.

Edit Case Data Tab: Check Case Times

This enables you to view the times in paired time fields in a case record without having to go into each section of the case record.

- The **From** and **Thru** values columns are the clock times that the actions recorded in the **From** and **Thru** fields columns began and ended.
- The Total Time column is the difference in hours and minutes between the **From** and **Thru** values.

Notes

- Only single line time fields are visible here. Multi-line time fields do not display in the Check Case Times screen.
- Field pairings for this screen are set up in the Case Record Field Mapping screen.
- You can get to this screen from **Check Case Times** in the following ways:
    - On the **Edit Case Data** tab.
    - On the Manage Case Records Results screen.

Important Note on Midnight Crossing

How OR Manager handles field pairs in which the start time is later than the end time

Example 1

Start: 2300 End: 0400) depends on parameter **check_case_record_times**:

- If **check_case_record_times** has a value, you may have the standard user-defined field **proc_end_date** in your case record and use it to record the date on which the surgery ends. If **proc_end_date** is empty or not present, OR Manager perceives that the case may end on the current date and displays an error message. You can perform one of the following actions:
  - Click **Yes** in the screen displaying the error message, which allows your current values for start time and end time to remain.
  - Enter a date in **proc_end_date**that is greater than the procedure date to indicate that the procedure crossed midnight.
  - Change the start or end time.
- If **check_case_record_times**is not set, OR Manager allows you save the case record without an error message when the start time is greater than the end time in a field pair. However, the entry for the field pair on the Case Record Time Field screen has a yellow highlight and the Total Time will be 0:00 to indicate that it may be a data entry error.

  Reports and other records will assume a midnight crossing situation and record the number of hours accordingly.

Example 2

Start: 2300 End 0400. Case Record Time Field screen shows a Total Time of 0:00 and the line is highlighted. (See the picture under *Edit Case Data Tab: Check Case Times* on the previous page.) If you let it stand, the system assumes a midnight crossing and records the duration as 5:00 hours for statistical reports, billing calculations and cost calculations.

See *Edit Case Data Tab: Buttons* on page 160.

See *Manage Case Records Results Screen* on page 219.

See the *OR Manager Configuration Guide*: Case Record Dictionaries.

Edit Case Data Tab: PNDS Form

Overview

OR Manager includes a complete Perioperative Nursing Data Set (PNDS) system that enables users to document PNDS outcomes and the interventions associated with them. Components of the PNDS system include the following:

- The PNDS Outcomes dictionary, which is preloaded with entries for all of the PNDS outcomes and their supporting interventions.
- A PNDS form, or template, on which you can place the PNDS outcomes and interventions that you want to appear on all case records. This PNDS form is always available for recording standard interventions and outcomes in case records.
- A standard table for customizing response choices for outcomes on PNDS forms on case records.
- All PNDS interventions in the form of standard user-defined fields that can be placed on case record forms.

  When a response is entered into a PNDS intervention field on a form, the outcome associated with the intervention and all other interventions for that outcome automatically appear on the standard PNDS form for that case record.

  If an outcome is associated with multiple interventions you can select which outcome to apply to your case record.

PNDS Form on Case Records

The case record PNDS form contains outcomes and their associated interventions in menus from which the user can document the interventions initiated during surgery, and their resulting outcomes.

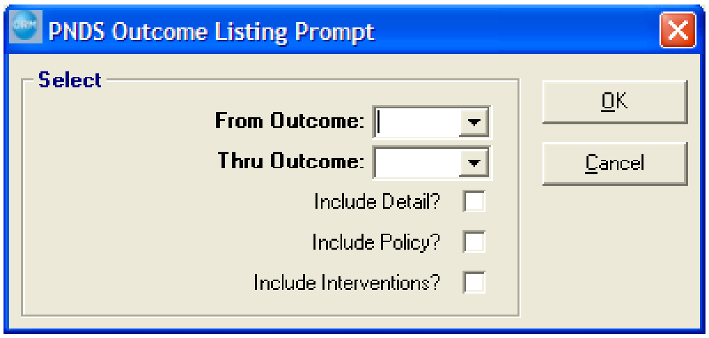
These fields have three sources:

- Outcomes that appear on every case record. These are the outcomes selected in the PNDS Form Builder dictionary.
- Outcomes that appear only on certain case records. These outcomes are associated with Intervention user-defined fields. By placing an intervention on a user defined case record form you are making it possible for the associated outcome and all other interventions to appear on the PNDS form. This feature can be activated by entering a value in the intervention field.

> **Note:** The selections for responses in the menu for PNDS Outcomes comes from the OUTCM_STAT standard user defined table. You can use this table to customize responses. See the *OR Manager Configuration Guide.*

Printing Outcomes

There are several options for printing PNDS outcomes:



- Use **From Outcome** and **Thru Outcome** to select the range of outcomes to print.
- Select **Include Policy?** to print your institution's policies associated with the outcomes.
- Select **Include Criteria?** to print the criteria associated with the outcomes.
- The **...with Interventions?** prompt displays only if you have selected **Include Criteria?** Select **...with Interventions?** to include interventions with the criteria in the report.

Edit Case Data Tab: Case Record Defaults

OR Manager can automatically populate specified case record fields when a case record is started. It does this based on the procedure/surgeon combination. Fields are selected by surgeon/procedure combinations in the Case Record Default dictionary.

Note: Load Case Record Defaults as soon as you begin a case. If you enter them later, you could unintentionally overwrite pre-exisiting data.

See the *OR Manager Configuration Guide*: Case Record Dictionaries.

Load Case Record Defaults

1. Click **Load Case Record Defaults** on the **Edit Case Data** tab.

   The Load Case Record Default screen appears.
2. Select a Case Record Default. (The default for this surgeon/procedure combination is highlighted.) then click **OK**.

   The fields in the case record specified for this default automatically fill in, overwriting information already in those fields, including defaults specified in user-defined screens.

Update NUR Linked Fields

Menu:Case Record Options > Update NUR Linked Fields

Prior to a patient's surgery, Nursing Intervention data may be captured in a Nursing module. This data can be linked to OR Manager and displayed in user-defined case record screens.

Nursing data is stored in the Interface Database table MIS_QUERY_MAIN. The data from this table can only be loaded one time per case record and cannot be refreshed or removed for the same patient after it has populated the fields.

Notes:

- This only applies to clients with the Meditech NUR (Nursing) Documentation module. This feature does not function for clients without the NUR Documentation module.
- Picis must activate a specific system parameter for this feature to function.

The only way to remove nursing intervention data is through the CHANGE PATIENT feature. This resets the case record fields and removes the data.

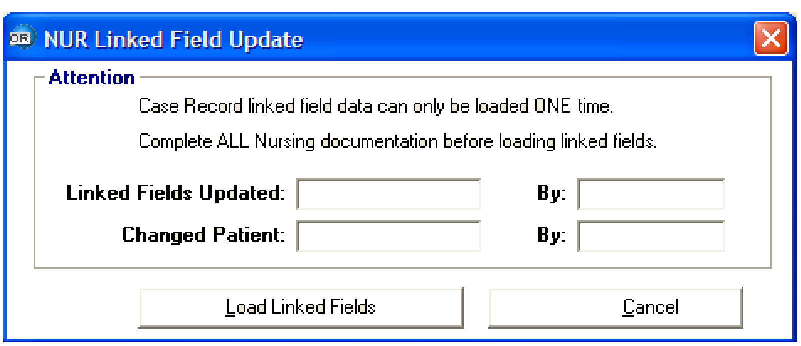
Note: As a matter of procedure, case record defaults should be initiated first and then all nursing documentation completed prior to invoking this feature. If nursing data is loaded through this feature and then Load Case Record Defaults is invoked, nursing data will be lost.

Update NUR Linked Fields

1. Select **Case Record Options > Update NUR Linked Fields**.

   The NUR Linked Field Update screen opens.

   If the parameter is set to 'N' this field does not appear on the Case Records Options menu.



Note: If the linked fields have not been loaded, the activity date/time and users fields are blank. When the linked fields have been loaded, the screen displays the last date, time, and user of that update. The Load Linked Fields button will be unavailable after this update.

2. Click the **Load Linked Fields**to populate user-defined screens with nursing intervention data.

Note: The update process cannot be performed while section edits are in progress. Case record sections must be closed to avoid a conflict in audit trail activity.

If the Change Patient feature is invoked sometime after manually updating the fields, the NUR Linked Field Update screen reflects a date, time, and user for when the patient was changed. Nursing data must be uploaded again for the new patient by clicking the **Load Linked Fields**.

See the *Security Manager Users Guide*.

Add-On Cases Screen

Menu:File > Enter Add-On Cases

OR Manager's Add-On Case feature allows you to quickly prepare OR Manager for emergency or other last-minute add-on cases that are not already booked. You can print picklists and worksheets with or without starting a case. You can also use the feature as part of your workflow when bringing a patient back to the OR.

Best Practice:
Picis recommends that you do not use the Add-on screen if you transmit supplies at the time of picking them. (The transmission of charges and supplies is discussed in the *OR Manager Configuration Guide*.)

Note: To start a case for a patient whose name you do not know, you can enter the patient as John or Jane Doe (or equivalent) then change the name on the case later in Manage Cases.

Workflow for Patients brought back to the OR...

...from the PACU

The add-on case can provide a means of handling the situation in which a patient is in post-anesthesia recovery, and then must unexpectedly return to the OR. (For example, due to bleeding that must be surgically controlled.)

For systems integrated with Anesthesia Manager, specific workflows must be followed to ensure that data is entered in new records rather than inadvertently overwriting data in the previous ones. The following setup is necessary before the workflows can be followed:

1. Use DB Editor to create a new encounter type (e.g. "Bring Back to OR")
2. Use Customize to create two templates linked to this new encounter type:
   - Anesthesia_BB
   - PACU_BB

(Instructions for creating encounter types and templates can be found in the *System Configuration Guide*.)

Workflow 1 – PACU Manager -> ORM Add-on Case -> Anesthesia Manager

1. Using PACU Manager, transfer the patient out of the PACU.
2. **Using OR Manager, start an add-on case with the required patient.**
3. (When in the OR) Using Anesthesia Manager select the Add On preadmission from the census list and start a session using the "Anesthesia_BB" template. This will automatically transfer the patient in and link the add-on case.
4. Using Anesthesia Manager, at the end of the case transfer the patient out of the OR.
5. (When in the PACU) Using PACU Manager, select the patient from the transfer list and start a session using the "PACU_BB" template.

Workflow 2 – PACU Manager -> Anesthesia Manager -> ORM Add-on Case

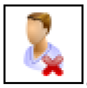
1. Using PACU Manager, transfer the patient out of the PACU.
2. (When in the OR) Using Anesthesia Manager select the patient from the transfer list and start a session using the "Anesthesia_BB" template. This will automatically transfer the patient in and link the add-on case.
3. **Using OR Manager, start an add-on case with the required patient.**
4. Using ADT Administrator, link the preadmission (created when you started the add-on case) to the admission.
5. Using Anesthesia Manager, at the end of the case transfer the patient out of the OR..
6. (When in the PACU) Using PACU Manager, select the patient from the transfer list and start a session using the "PACU_BB" template.

...from the ICU

The add-on case can also provide a means of handling the situation in which a patient is brought back to the OR from the ICU.

For systems integrated with Critical Care Manager, specific workflows must be followed. The setup and workflows are basically the same as for bringing the patient back from the PACU, except that the initial transfer is made from Critical Care Manager (not PACU Manager) and the Anesthesia Manager session can be run using a standard "Anesthesia" template. (An "Anesthesia_BB" template is not needed if Critical Care records and Anesthesia records are linked to different encounters, as they normally would be.)

Toolbar buttons

Toolbar buttons are the same as those for standard case records, with the addition of a **No Patient** button, , and a **Print** button, . Usage of these buttons is described in *Printing Picklists and Worksheets* on the facing page.

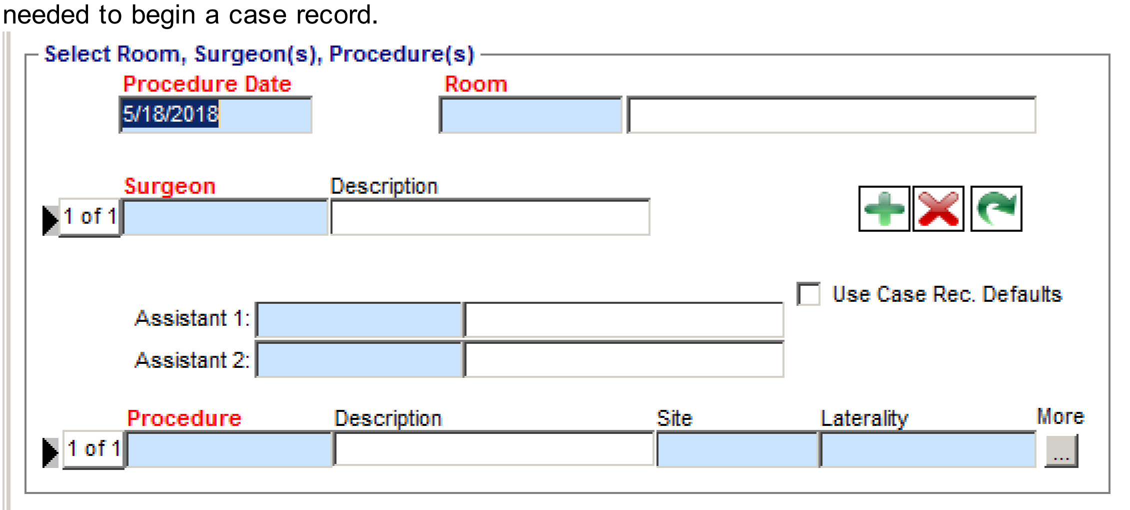
Starting a Case

Enter an Add-On Case

1. Select **File > Add-On Cases**.
2. Select a facility.

   The Emergency/Add-On Case screen opens.
3. Enter the patient search criteria in the fields and select a patient in the same way as for a standard case record.

   Fields appear beneath the patient data for you to enter the basic surgeon/procedure information needed to begin a case record.



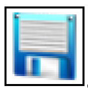
4. Enter the case data:

- Add-on cases assume only one surgeon, but you can add, move and delete others by using the corresponding buttons to the right of **Surgeon**.
- Select the **Procedure(s)** you are planning to perform for this case.
- Select **Use Case Rec. Defaults** if you want to use the defaults for the surgeon and procedure combination.

You can load defaults later from within the case record if you choose not to load them now. However, you risk overwriting data already collected manually.

5. Click **Print** to select and print picklists and worksheets. See *Printing Picklists and Worksheets below*.

Best Practice:
Picis recommends that you print picklists and worksheets for the case when starting it, because it is more difficult to print those documents with patient-specific information after the screen closes.

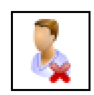
6. Click the **Save** button, .
(If you have no patient name, the **Save** button is disabled and a case cannot be created.)
The case is saved, and the case record is started. You can now work with the case record through Manage Cases or Enter/Edit Case Records just like any other case.

Printing Picklists and Worksheets

A major advantage of the Add-On Case feature is the ability to quickly print picklists and worksheets for emergency and other add-on cases.

The **Print** button becomes enabled as soon as you have selected a patient (or clicked the **No Patient** button) and entered a room, surgeon and procedure.

Print a picklist/worksheet without starting a case

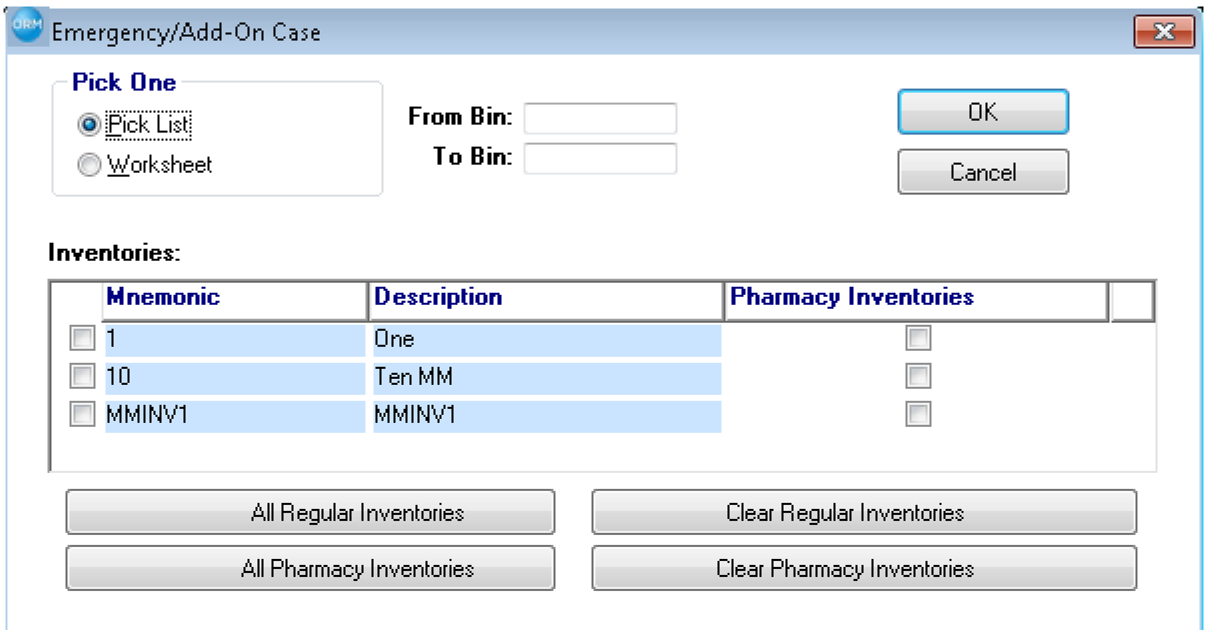
1. Follow the procedure for starting an add-on case, but click the **No Patient** button, , instead of searching for a patient.
2. Follow the next procedure for printing picklists/worksheets.

Print a picklist/worksheet from the Add-On Case screen

1. Click the **Print** button, .
The Emergency Add-On Case Print screen appears.
2. Choose **Picklist** or **Worksheet**, and specify **Inventories** and **Bins** (if necessary), then click **OK**.

Note: By leaving bins blank all supplies are included.

3. Specify inventories.
4. (Optional) Specify bins
5. Select the inventories you want to print picklists for by checking the check boxes to the left of each inventory or clicking one of the following:
   - **All Regular Inventories**
   - **All Pharmacy Inventories**



Note: Pharmacy inventories are denoted by a checkmark in the box to the right of the inventory. To select a pharmacy inventory, check the box to the *left* of the inventory mnemonic.

6. Click **OK**.

   The picklist or worksheet appears.

Completing a Case Record

After you've entered all of the appropriate information on the Case Records screens, you can change the status of the case record to Completed.

Note: Picis recommends that you establish and execute an effective auditing process following each case. An effective process is to have the auditor complete the cases, so that only a select group of users have access to complete and reopen cases. This helps to prevent users from reopening cases and applying unauthorized edits.

There are two ways to complete a case record:

- Complete the entire record at one time. This is the standard and most common method. All required fields are checked for values.
- Close each individual section of the case record, and then complete the record. All required fields are checked for values. This is only an option if a parameter has been set by Picis. Call the Client Center for more information. You may want to use this option if several users are entering case record data because it allows each user to close their own section of data. In addition, the user completing the entire case record knows if all the sections have been closed. Required fields are checked when each section is closed.

Complete several case records at one time from the Manage Case Records main screen. This option completes a selected set of case records. This option can be used in conjunction with either of the two previous options.

Five things occur when a case record is marked complete:

1. It becomes a view-only case. No edits can be made unless the case is changed back to an In-Process case.
2. Any case record fields linked to your HCIS admissions data are no longer automatically updated by the Admissions background job.
3. The case is used in calculations for the standard reports and average case lengths.
4. Charges and Supplies will be sent to your HCIS system during the next transmit.
5. All standard reports count completed case records only.

9

Custom Field Select

Overview

The Custom Field Select feature allows you to search based on standard and user-defined fields and declare relationships between them so you can search on complex combinations of values. The Custom Field Select feature is found on these screens:

- Manage Bookings
- Manage Case Records
- Manage Pre-Admit Bookings
- User Defined Fields
- SmarTrack Macro Background Trigger Dictionary

This chapter contains the following topics:

- *Using Custom Field Select*
- *Custom Field Select Detailed Explanations*

The following sections explain important Custom Field Select tasks.

- *Save Custom Field Select Conditions*
- *Recall Custom Field Select Conditions*

Using Custom Field Select

Below are the six steps involved in conducting a Custom Field Select.

1. Click **Custom Field Select** on any of the three manage screens where it is available.

   The Custom Field Select screen appears.

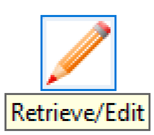
2. Select a **Field** to search on. For example, if you are selecting an ICD code, you select that type as the field, and then click the ellipsis (...) next to **Value** to open a Search Diagnosis Codes screen.

   For multi-line fields, multiple codes are added by clicking **Add**.

   > **Note:** The ICD/CPT search screen described above and from the search screen that is displayed from the Procedure dictionary default to having the *Code* and *Begins with* search options enabled when the screen opens.

   In **Effective Date** you can enter a date that the system uses to determine the codes to display for your selection. If you select **Description**, you can enter characters in **Keyword** that configure the code search according to whether you select codes that **Contain** the characters or that **Begins with** the characters. By default, **Code** and **Begins with** are selected when the screen is opened. An appendix in the *OR Manager Configuration Guide* discusses the transition between different versions of ICD codes.
3. Select Which (line) to search (for multi-line fields only).
4. Enter an Operator. This declares the relationship between the field and the value you are searching for.
5. Enter the Value you are searching for.
6. Click **Ok**.

   You are returned to the manage screen.
7. Click the **Retrieve/Edit** button.

Bookings that meet the selected Custom Field Select and any other criteria are listed.

Custom Field Select Detailed Explanations

See *Using Custom Field Select* on the previous page for the six steps to conducting a basic Custom Field Select. Explanations of each step follow, including details about the Custom Field Select screen.

Selecting a Field

The **Field** drop-down menu lists the fields you can search on (the Manage Booking screen lists booking fields, the Manage Case Record screen lists case record fields, etc.).

This table explains some of the fields on the Custom Field Select screen whose meanings may not be readily apparent:

Field	Description
Type	Tells you whether the field is Standard or Custom: *S* - *S*tandard *C* - *C*ustom (user defined).
Multiple	Indicates if the field is multi-lined.
Links	Shows you what dictionary or table (if any) the field links to.

Which [line]

The **Which** drop-down menu, which applies only to multi-lined fields, allows you to specify which line to search on.

Select	Type of Search
Any	multi-lined fields in which any one of the lines match the value for which you are searching.
Same	the same line on a multi-lined field that you are searching in the entry above it. Same = Same As Above

Note: The Which column cannot be SAME for Custom user-defined fields.

Operators

The **Operator** defines the relationship between the selected Field and a Value, such as *Equal, Greater Than,* or *Less Than*. In the example in *Using Custom Field Select* on page 210, we use the **EQ** (Equal) Operator to find the Cancel Reasons fields with values that **Equal** Overbooking.

Custom Field Operators

Operator	Description
Contains	Use when searching for a part of a string. You are telling OR Manager to, "Find values for this field with strings that contain these letters/numbers." For example, a search of a name field for values containing, "Mac" turns up all names with "Mac" within them—**Mac**Donald, Grimache, etc.
Equals	Use to find an exact match for a field.
Exists	Use to find fields that are *not* blank.
Greater Than or Equal to	Useful when searching for numeric values such as times and dates. *For example*, Greater Than or Equal to January 20, 1999 means: On, or after, this date.
Greater Than	Useful when searching for numeric values such as dates and times. Greater Than = *Later Than,* or *After*: 1/02/99 is Greater Than 1/01/99.
In This List	Use to create an OR condition among a list of values for which you are searching. Use the Pipe character, **"|"**, to separate list entries. ***For example***, if you are searching the Surgeon Field for Doctors Smith, Jones, and Schultz, use the In This List operator and enter, smith|jones|schultz in the Value Field. The system searches all the Surgeon Fields with values (entries) of Smith or Jones or Schultz.
Less Than or Equal to	Useful when searching for numeric values such as dates and times. *For example*, Less than or Equal to January 20, 1999 means *on,* or *before*, this date.
Like	Use the Like operator with the percent sign "%" to narrow your search. Below are examples of Like searches: "col%" finds strings beginning with "col," such as **Col**ostomy and **Col**on Resection. "%tomy" finds strings ending with "tomy," such as Laminec**tomy** and Gastrec**tomy**. "%ter%" finds strings with "ter" within them, such as An**ter**ior and Pos**ter**ior.
Less Than	Useful when searching for numeric values such as dates and times. Less Than = *Before* or *Earlier Than*. 01/01/99 is Less Than 01/02/99.

Operator	Description
Not Equal	Useful when trying to exclude a certain value from your search. *For example*, to list all bookings canceled by someone other than Dr. Jones, select your Canceled By field (supposing you have one), enter Not Equal as your operator, and enter *Dr. Jones* as your value.
Does Not Exist	Use to find fields that are left blank. These fields are *not* filled in, so their values do not exist.
Not Greater Than	Useful for numeric values such as dates and times; you can think of it as: Not *Later* Than.
Not In This List	Use to create an "or" condition among a list of values for which you are trying to exclude from your search. Use the Pipe character, "|", to separate list entries. ***For example***, if you are searching the Surgeon Field for values other than Doctors Smith, Jones, and Schultz, use the Not In This List operator and enter, "smith|jones|schlutz" in the Value Field. The system searches all the Surgeon Fields to find values (entries) other than Smith or Jones or Schultz.
Not Like	Similar to the Like operator described above, but used to omit, rather than include, strings. Use this to narrow your searching of strings. Use the percent sign "%" in the following ways: "col%" finds strings *not* beginning with "col". **Col**ostomy and **Col**on Resection would be excluded. "%tomy" finds strings *not* ending with "tomy". Laminec**tomy** and Gastrec**tom** would be excluded. "%ter%" finds strings that do *not* contain "TER" within them. An**ter**ior and Pos**ter**ior are excluded.
Not Less Than	Useful for numeric values such as dates and times. You can also read it as: Not *Earlier* Than.

Multiple Field Searches

You can perform a Custom Field Select on multiple fields. When searching on more than one field, both of the values have to match your search for the booking to appear on the Manage Bookings screen (unless you declare an *or* relationship between conditions).

If you search the **Booking Date** field for values **Greater Than** April 20, 1999, and search the **Canceled By** field for values that **Equal***Roy White*, you will see (on your Manage Bookings screen) all bookings canceled by Roy White since April 20, 1999.

Relationships

You can declare complex relationships conducting a Custom Field Search.

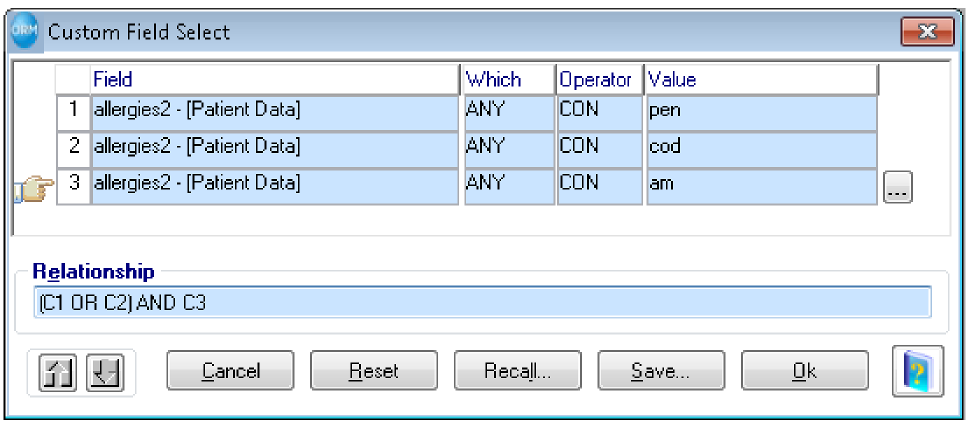
You might want to bring up bookings canceled by Dr. Curran *and* bookings canceled by Dr. Jones. **Relationships**, on the bottom of the Custom Search Field screen, allows you to conduct searches on complex combinations of field values.

Declaring Relationships

When conducting complex Custom Field searches, you enter your search criteria, then, in **Relationships** (at the bottom of the screen,) declare the relationships. There are two basic kinds of relationships: *And* and *Or*.

- **And**: *Both* conditions surrounding the **And** must be true in order for the record to be selected.
- **Or**: If *either* condition surrounding the **Or** is true, or *both* items surrounding the operator are true, then the record is selected.

This is an example of a Custom Field Search with Relationships.



Relationship Formulas

The following expressions can be used in for the **Relationship**: *(), And, Or, C1, C2, C3, C4, C5*, etc.

The following are examples of valid expressions:

- *(C1 And C2) Or (C3 And C4)*
- *C1 And C2*
- *C1 Or C2 Or C3*
- *((C2 Or C3) And C4) Or ((C1 And C5) Or C6)*

Saving Custom Field Select Conditions

You can save your Custom Field Select Conditions so that you can quickly recall the search criteria when you want to repeat the search. It is especially useful to save complex searches involving Relationships.

You can save the Custom Field Select Conditions so that your search brings up cases canceled due to overbooking, (see example in *Using Custom Field Select* on page 210). After the search conditions are saved, you can quickly repeat the search without reentering the data.

Save Custom Field Select Conditions

1. Click **Save** on the Custom Field Select screen.

   The Custom Field Select Conditions screen appears.
2. Enter a **Mnemonic** and **Description**, then click **Save** to save your Custom Field Select Conditions.

   Your Custom Field Select Conditions are saved.

Recall Custom Field Select Conditions

1. Click **Recall** on the Custom Field Select screen.

   The Custom Field Select Conditions screen opens.
2. Click **Open**.

   The Custom Field Select screen appears with your recalled conditions entered.

10

Managing Case Records

Overview

This chapter discusses the tools for managing case records:

- Manage Case Records
- Manage Case Records Results Screen
- Case Record Audit Trails
- Manage Case Record Defaults: Overview
- Manage Case Record Defaults: Screen
- Manage Case Record Defaults: Options Screen
- Manage Case Record Defaults: Add/Replace Data Screen
- Manage Case Record Defaults: Clear Data Screen
- Purge Bookings and Case Records

Manage Case Records

Menu:Tools > Manage Case Records

You use the Manage Case Records feature to search for, select, and modify single or multiple cases and to print audit trails and reports on case records.

Using Manage Screens

Manage Case Records works like the Manage Bookings and Manage Pre-Admit Bookings in that it uses two screens—one for doing the record search and the other for displaying and manipulating the search results. If you are not familiar with manage screens, see *Manage Screen Searches* on page 92.

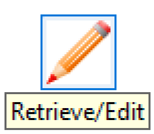
Search for Case Records

1. Select **Tools > Manage Case Records**.

   The Manage Case Records - Selection screen opens.
2. Enter your search criteria.

   Your selections appear under *Selected Items*.
3. If you are using Custom Fields, click **Custom Field Select** to display a Custom Field Select screen and enter your custom field information.

   This information can include an ICD code. To specify an ICD code, you select it as the field type, and then click the ellipsis next to **Value** to open the Search Diagnosis Codes screen. In that screen your first action should be to enter a value for **Effective Date** that the system will use to determine the codes to display.
4. Click the **Retrieve/Edit** button.

   The Manage Case Records Results screen appears, showing the cases that meet your criteria.

Manage Case Records Results Screen

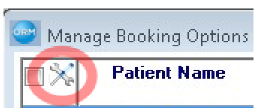
The Manage Case Records Results screen displays the records that meet your search criteria and has a number of buttons that you can use to work with these records.

Reconfigure the Results Screen Columns

Follow the steps below to reconfigure the display of the retrieved bookings.

Note: The Case Record # displays as the last search results column so long as there are no pre-existing settings configured. In that scenario, the existing settings are displayed and additional changes must be made manually.

1. Click the configuration icon.



   The Select Columns to Display screen opens.

2. Click to select the **Available Columns** on the left and click the arrow to move them to the **Columns to Display** area on the right.

   Note: At least one search result column must be displayed at all times within Manage Case Records. A warning message appears if at least one display field is not selected.

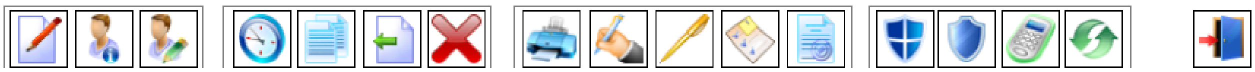
3. Click **Save** to save this configuration.

   Note: Configuration settings are stored per user, per workstation.

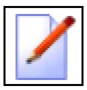
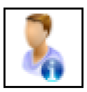
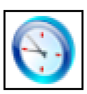
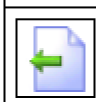
Screen Abbreviations

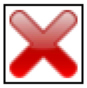
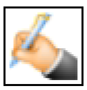
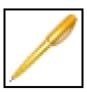
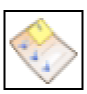
- The first column, just to the left of the patient name, may contain an asterisk (*) to indicate a complex case.
- The Status column uses several abbreviations:
  - **I**: The record is incomplete.
  - **C**: The record is complete.
  - **U**: The record is unsigned.
  - **S**: The record is signed.

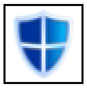
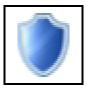
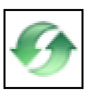
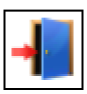
Manage Case Records Toolbar



Manage Case Record Buttons

Button	Description
 **Edit Case**	Opens the **Edit Case Data** tab on the Case Record screen to allow editing of the highlighted case record. *Edit Case Data Tab* on page 159.
 **Edit Patient Data**	Opens the **Patient** tab on the Case Record screen to allow editing of case record patient data. *Patient Tab: Patient Data Forms* on page 155.
 **Change Patient**	Allows you to do the following: Change patient on the selected case record. Assign an account or unit number to a case that does not have one. *Change Patient* on page 223.
 **Check Case Times**	*Edit Case Data Tab: Check Case Times* on page 197.
 **Copy Case**	Allows you to select a previous case for the patient and create a new case by automatically copying the same visit and account number and with the information from the first case defaulting into the new case rather than having to re-enter the information. *Copy Case* on page 156.
 **Complete**	Changes the case record status to Complete. *Completing a Case Record* on page 206.

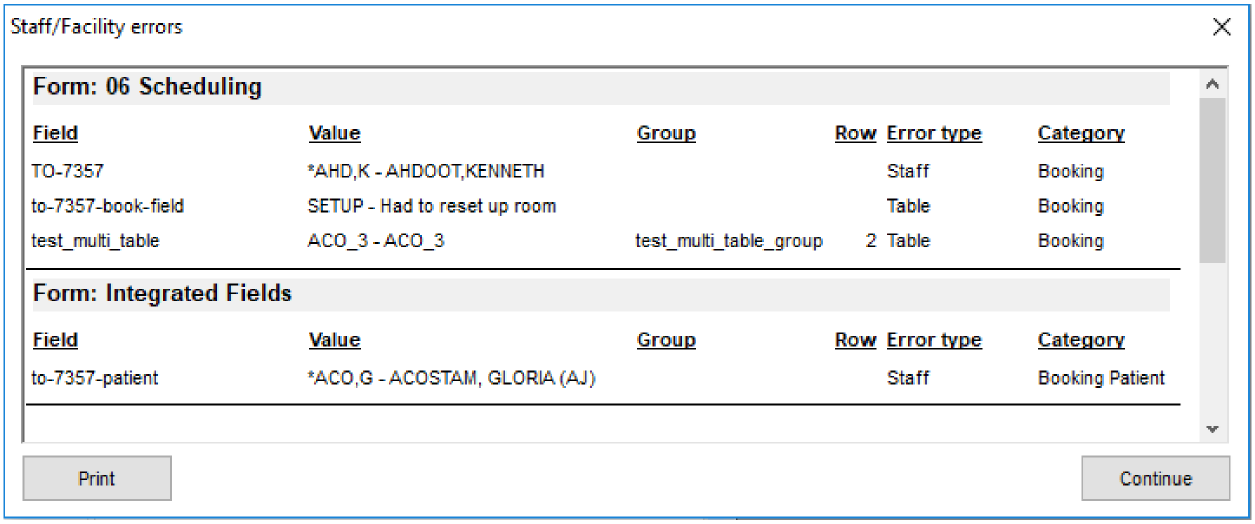
Button	Description
 **Delete**	Permanently deletes the highlighted case record.
 **Print Case**	Prints the case record in one of four formats.
 **Electronic Sgnature**	Allows you to electronically sign off on edits you made in the case record.
 **List Signed/ Pending**	Shows a list of all the users who must sign the case and whether or not they have done so.
 **PNDS Form**	Displays case record fields tied to PNDS Outcomes.
 **External Reports**	Click to print an External Report. For more information, see the following chapter in the *OR Manager Configuration Guide*: External Reports.

Button	Description
 **Field Level Audit Trail**	Shows all changes made to fields within the case record. *Field Level Audit Trail* on page 226.
 **View Audit Trail**	Shows activity at the case record header and section level. *Header/Section Audit Trail* on page 227.
 **Billing History**	Displays the Billing History screen from the case record.
 **Refresh**	Updates the case record display from the database to show the most current information.
 **Close**	Closes the Manage Case Records Results screen.

Best Practice: If your site uses electronic signature technology, staff should use Manage Case Records to locate any unsigned case records for their user logins.

Multi-facility sites

At multi-facility sites, depending on the configuration you may be presented with an error information window such as the following when opening a case record:



This can happen if your hospital has changed the database configuration of one or more dropdown list entries used in the case record such that they are no longer available for the case record's facility. For example, the case record may include an item of equipment that is no longer available in the facility.

Click **Print** to print the error information and continue working with the case record. If you later save the case record you will be shown the window again and it will include a **Fix** button. Click **Fix** to return to the previous screen and change the dropdown selections for the invalid entries before saving again or click **Continue** to save the case record with the invalid entries.

Change Patient

Change Patient is used to change the patient information (name, account number, forms, etc.) associated with a case record from one patient to another who has a record in the OR Manager or HIS database.

The most common use of this feature is to allow the transfer of a case record originally created for an anonymous, or *John Doe*, patient whose case record was started under Add-On Cases. When the patient's name is known, he or she is admitted through normal processing, then the *John Doe* case record is transferred to the correct patient.

Note: You can change a patient only to another with an account number from your HIS system. You cannot change a patient to a patient with no account number.

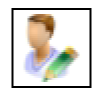
This feature is also used when an incorrect account number was selected and you need to transfer the patient information to the right patient.

> **Note:** Changing patients in an integrated system causes changes in linked patient records in other Picis Perioperative and Critical Care modules such as Preop Manager, Anesthesia Manager, PACU Manager and Critical Care Manager.

In a Total Perioperative Automation site, if a booking and case are linked and have the same patient MRN, a change patient action that selects a different patient for the case results in a message. The message requests correction of the patient or the creation of an add-on case for the selected patient. The change is not executed, and clicking OK on the message displays the patient search screen with the most recent results.

Change a Patient

In the following procedure, the initial patient on the case is referred to as the *old* patient; the replacement patient is referred to as the *new* patient.

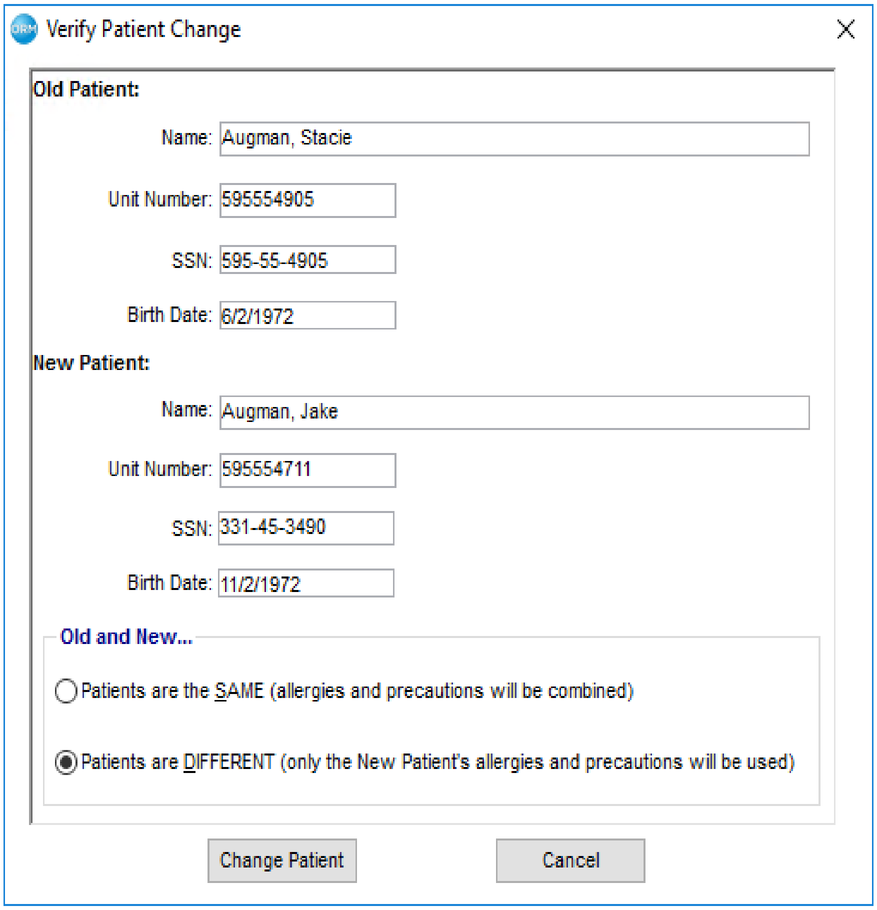
1. On the Manage Case Records results screen, click the **Change Patient**. button, .

   The Change Patient on a Case screen opens. The search screen is similar to that shown when starting a case record.

   (The **Modify Name** button is only available in standalone "administrative module" systems and for patients from the OR Manager case record system.)
2. Using standard search procedures, search the OR Manager case record system or HIS system for the patient you want to transfer the case record to.

   The patient records that meet the criteria you specified appear at the bottom of the screen.
3. Select the patient you want to transfer the case to.

   The Verify Patient Change screen appears, showing both old and new patient data for verification:



4. Select one of the two options in the lower part of the screen. The text in the screen describes the consequences of each option:
   - **Patients are the SAME:** Old and new patient allergies and precautions are combined. .
   - **Patients are DIFFERENT:** Only the new patient's allergies and precautions are used.
5. Click **Change Patient**..

See *Patient Tab: Search Details* on page 150.

Case Record Audit Trails

The Manage Case Records Results screen gives you two audit trail options:

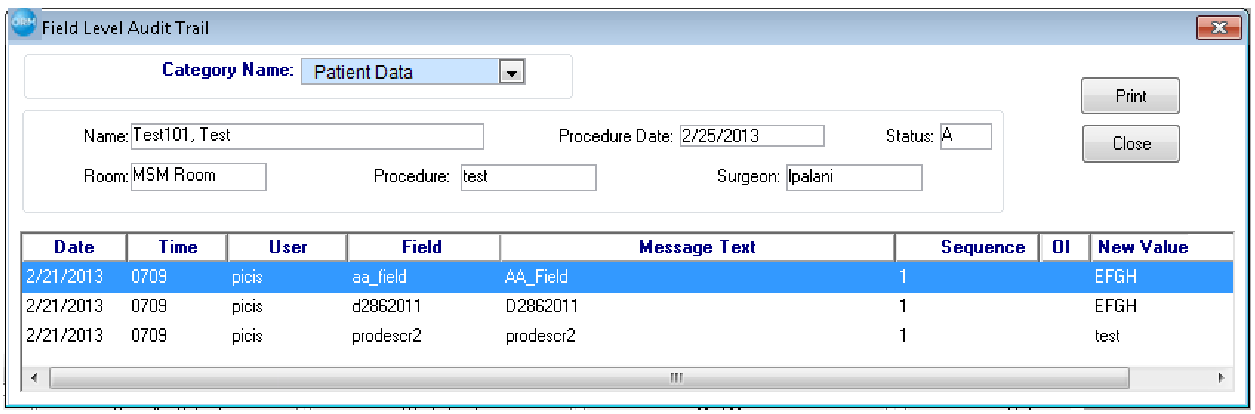
- Field Level Audit Trail.

- Header/Section Audit Trail.

Field Level Audit Trail

The Field Level Audit Trail screen, accessible from the **Field Level Audit Trail** button on the Manage Case Records Results screen, lists changes to any data field in the case record sections since the record was created.

This list includes the original value, new values, who made the changes, and dates the changes were made.The Field Level Audit Trail tracks changes in the value of the field that specifies VIP status for a record.



In addition, right-clicking on a field in a column on the Field Level Audit Trail screen brings up a menu:

- Select **Filter...** to see only entries containing the same data as the field you clicked on.
- Selecting **Undo Filter** takes off all filters and displays audit trails for all fields in the case record.

Making a selection in Category Name selects a form category to refine the list of changes that are displayed. When the Field Level Audit Trail screen is opened for one field by single-clicking on the audit icon associated with the field, you cannot make a selection in **Category Name**.

You can print the Field Level Audit Trail by clicking Print.

Note: You can also display this screen through the Field Level Audit Trail button on the Case Record screen, or by clicking once on the audit icon associated with the case record field.

A limitation exists in the characters shown by the Case Record Field Level Audit Trail. Special characters that are used to define the numeric format of a user-defined field are not displayed in the Field Level Audit Trail. Examples of special characters that are not included in the Field Level Audit Trail appear inside quotation marks below:

"/"

","

"-"

"("

")"

When these characters are part of a user-defined field's numeric format (as defined in the screen builder), they do not display in the Field Level Audit Trail. For example, if a used-defined field is formatted with a forward slash as a separator, the data appears on the form as, "80/120" but appears in the Field Level Audit Trail as "80120."

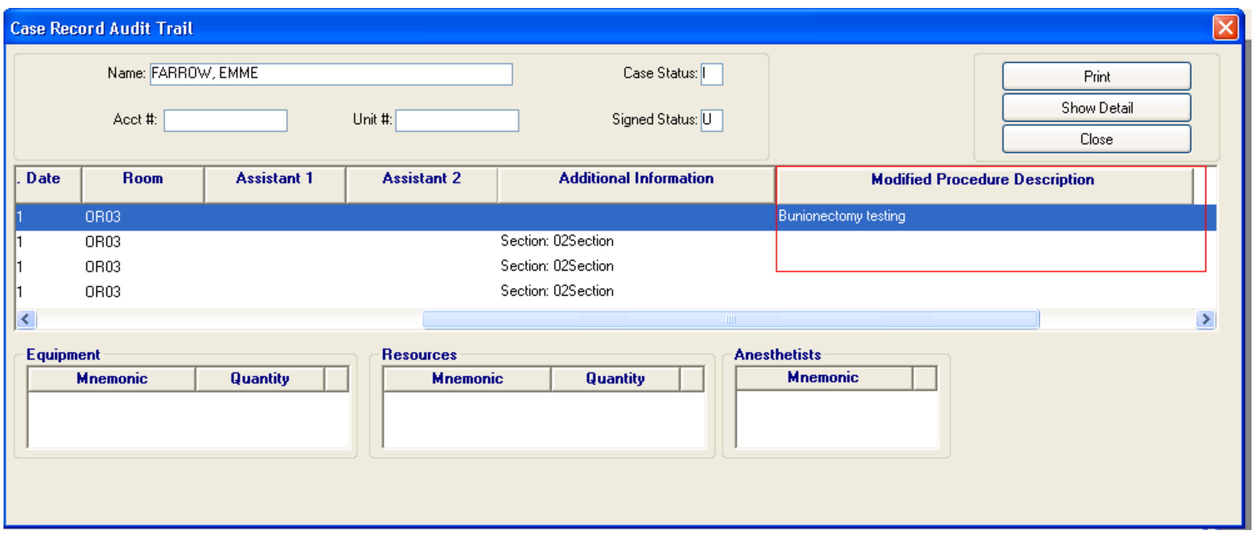
Changes in patient data made by a scheduler are shown in the field level audit trail with an attribution to the scheduler.

If a patient has an allergy and reaction that is other vendor deleted, they are sorted to the bottom. This sorting is reflected in the field level audit trail as a change by the OR Manager application, "SYS_ORM."

Header/Section Audit Trail

The Header/Section Audit Trail screen, accessible from the **View Audit Trail** button on the Manage Case Records Results screen, shows any activity in the header or any section of the case record. This includes viewing, editing, printing, closing, and re-opening.

In addition, when you highlight a Header section, you can click **Show Detail** to expand the screen and see details of changes made to header fields.



Click **Hide Detail** to collapse the screen to its original size.

Modified Primary Procedure Description Auditing

When you scroll to the right-hand side in the grid that displays actions performed on headers and sections, the Modified Procedure Description column becomes visible.

The **Modified Procedure Description** column displays the procedure name if changes have been made in the procedure description. To see a modified procedure description, you select the row that indicates the change and click **Show Detail**. The screen expands to show details, and you click the ellipsis at the right-hand end of the **Modified Procedure Description** to display the description.

The description appears in the **Modified Procedure Description: (View Only)** screen. Clicking **OK** in the **Modified Procedure Description: (View Only)** displays a screen that allows you to print, save, or email the modified description, as described in *Printing, Saving, and Emailing Modified Procedure Descriptions* below.

Modified Secondary Procedure Description Auditing

Secondary procedures are visible under **Procedures** in the expanded screen shown by clicking **Show Detail**. A changed description for a secondary procedure is indicated by an ellipsis at the right-hand side of the **ProceduresMnemonic** column. For a primary procedure, if the length of the description is less than 60 characters, an ellipsis does not appear. Clicking the ellipsis displays the procedure description for the selected procedure, as shown in the following graphic. Clicking **OK** in the Modified Procedure Description: (View Only) screen opens another screen that allows you to print, save, or email the modified description, as described in *Printing, Saving, and Emailing Modified Procedure Descriptions* below.

Printing, Saving, and Emailing Modified Procedure Descriptions

Click **OK** in the Modified Procedure Description: (View Only) screen to display modified procedure descriptions as described in the preceding sections. Click **OK** in that screen displays the Manage Case Records screen shown in the following graphic. The Manage Case Records screen allows you to print, save, or email the modified descriptions by selecting options at the top of the screen.

View the Close All Sections Actions

Clicks **View Audit trail** and the following details displays in the audit trail:

- Action: CLOSE ALL
- User: user mnemonic
- Action dt.
- Action time
- Surgeon
- Procedure
- Room

Note: The time stamp of all the sections closed with using **Close All** have the same timestamp as the 'CLOSE ALL' in the audit trail. Additionally, if a user only has access to close 2 out of 3 sections, the "Close All" action appears in the audit trail if a user selects it, along with the 2 closed sections.

View Patient Summary

When a user views the Anesthesia Manager Patient Summary from within a case record in OR Manager, this **Action**is captured in the audit trail as `VIEW PT SUM`.

Case Record Upload Audit Trail

When a case record is automatically uploaded, an entry appears in the audit trail indicating the uploaded file format. The entry consists of the prefix CR UPLOAD followed by a file type indicator: PDF, RTF, TXT, or OV.

See the *OR Manager Configuration Guide*: Case Record Dictionaries.

Manage Case Record Defaults: Overview

Managing case record defaults involves working in two screens:

- A manage screen, where you enter search criteria.
- A manage options screen, where you select case record defaults from the list returned by the search.

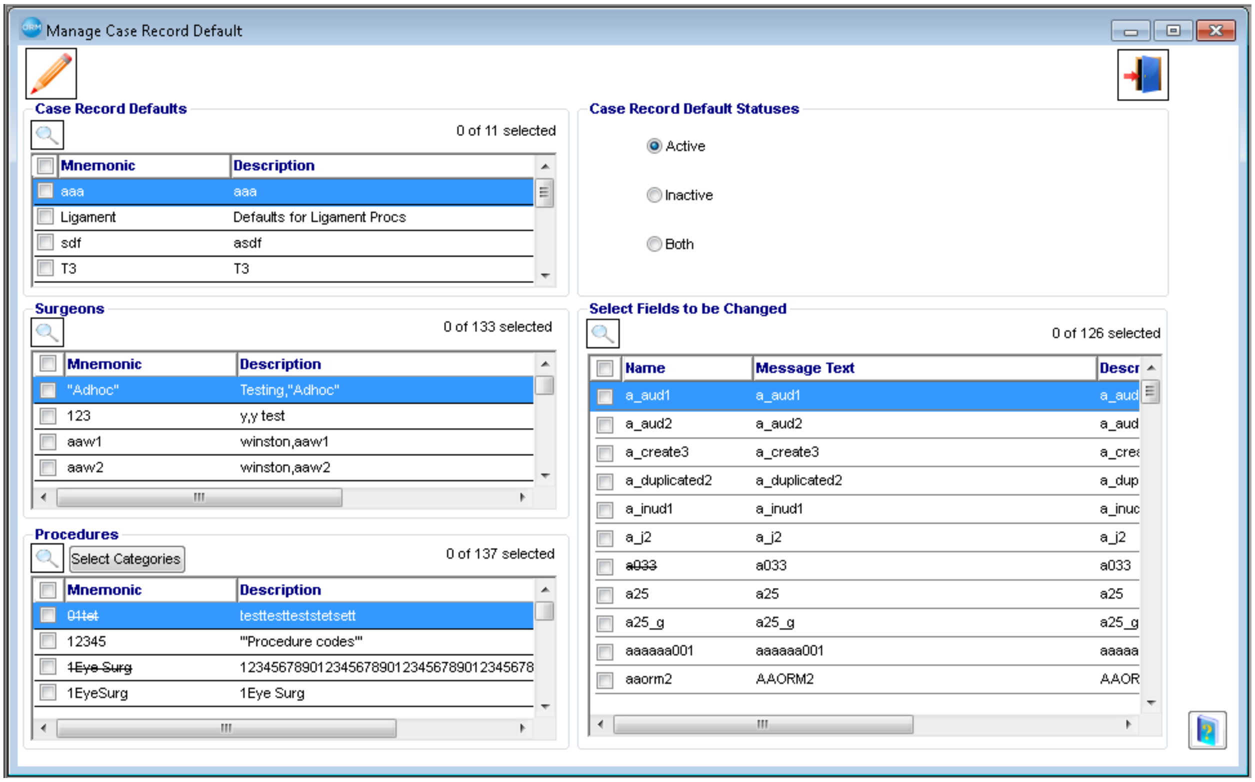
Manage Processing Flow

1. Select search criteria, such as case record defaults, surgeons, procedures, etc., on the Case Record Default screen.
2. Click the **Retrieve/Edit** button to search for case record defaults meeting your criteria. The Case Record Defaults Options screen appears with a list of defaults meeting your criteria.
3. (Optional.) Change the configuration of the display.
4. Select the case record defaults you want to work with from the Case Record Defaults Options screen.
5. Click the corresponding button at the bottom of the screen to edit defaults, add or replace multiple defaults, clear defaults, etc.

Manage Case Record Defaults: Screen

Menu:Tools > Manage Case Record Defaults

The Manage Case Record Defaults screen is used to locate case record defaults by default name, surgeons, procedures, fields, or default entry status.



Manage Screens

You can select case record defaults using any combination of the following types of criteria:

- **Case Record Default**: Select case record defaults directly.
- **Surgeons**: Look up surgeon specific case record defaults.
- **Procedures**: Look up case record defaults by procedure. There is also a button to look them up by procedure categories. See *Select Categories* on page 232.
- **Status**: Active, Inactive, or Both.

- **Select**: Fields to be Changed. Find case record defaults with entries in these particular fields.

Important Note on Select Fields to be Changed

The Select Fields to be Changed screen has two purposes:

- Like the other screens (**Surgeons**, **Procedures**, etc.) it is used as a filter to find default records.
- This screen also provides the list of fields whose data is to be modified or cleared in the records that meet the search criteria. In other words, if your search criteria does not include any entries in the Select Fields to be Changed screen, you can add defaults using **Add/Replace Data** on the Manage Case Record Default Options screen but no fields will be listed for modification. Likewise, if you click **Clear Data**, no fields are presented for clearing, but, again, they can be added on the Clear Data screen.

See Manage Case Record Defaults: Add/Replace Data Screen.

See Manage Case Record Defaults: Clear Data Screen.

Manage Screen Buttons

There are a number of buttons for each set of criteria. Click the check box to select or clear all criteria.

Button	Criteria	Description
Find [ ]	All	Enter search criteria for finding items. See *Find Buttons* below.
Select Categories	Procedures	Select procedures by Procedure Categories See *Select Categories* on the next page.

Find Buttons

Each of the criteria boxes has a **Find** button that you can use to search for surgeons, procedures, etc.

To use, click **Find**, select **Description** or **Mnemonic**, enter the characters you want to search for, then click **Next**.

The first criterion that matches the search character string is highlighted. You can then select the entry and/or click **Next** again to find the next entry that matches the characters you entered.

Select Categories

Select Categories allows you to select **Procedures** within Procedure Categories.

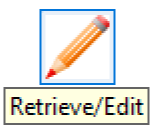
When you click **Select Categories**, a list of the Procedure Categories opens.

Select the Procedure Categories that contain the procedures you want to use by clicking the left column, then click **Select**.

The Procedure Categories selection screen closes, and the Manage Case Record Defaults screen opens. All of the procedures in the Procedure Categories you checked are now selected.

Select Defaults to Edit

1. Search for the Case Record Defaults you want from the Manage Case Record Default screen by entering your search criteria in the areas provided.
2. Click the **Retrieve/Edit** button.



The Case Record Default Options screen appears with the list of case record defaults that meet your search criteria.

See *Manage Screens* on page 230.

See *Manage Case Record Defaults: Options Screen* below.

Manage Case Record Defaults: Options Screen

After you select the case record defaults to edit, a screen opens with your selections listed.

Button Descriptions

Select the case record defaults you want to update, then click the appropriate button.

Case Record Default Options

Button	Description
Retrieve/Edit Default	Opens the Case Record Default dictionary to the entry for the highlighted card. For more information on the preceding topic, see the following chapter in the *OR Manager Configuration Guide*: Case Record Dictionaries.
Delete Default	Deletes all, highlighted, or selected case record defaults on this screen. This option should be limited to selected users through security.
Add/Replace Data	Use to add new defaults to selected records and to modify data in the list of fields selected in the Select Fields to be Changed screen of the Manage Case Record Default Options screen. See *Manage Case Record Defaults: Add/Replace Data Screen* below.
Clear Data	Use to clear data from the list of fields selected in the Select Fields to be Changed screen of the Manage Case Record Default Options screen and to add data fields to the list to be cleared. See *Manage Case Record Defaults: Clear Data Screen* on page 235.
Close	Closes the Manage Case Record Default screen.

Manage Case Record Defaults: Add/Replace Data Screen

You can access the Case Record Default - Add/Replace Data screen by clicking **Add/Replace Data** on the Manage Case Record Default Options screen. The screen opens with a list of the fields that you selected in the Select Fields to be Changed screen. Important tasks related to this screen are discussed in the following sections:

- Add Default Fields
- Modify Default Fields
- Process Default Fields

Button Table

This table explains the buttons in this screen.

Button	Description
Add	Click to add a new field to the list. See *Add Default Fields* below.
Modify	Click to edit the highlighted field. See *Modify Default Fields* on the facing page.
Remove	Click to remove the highlighted field from the list.
Process	Click to apply the changes you have made to the selected records. See *Process Default Fields* on the facing page.
Close	Click to close the screen and return to the Case Record Default Options screen.

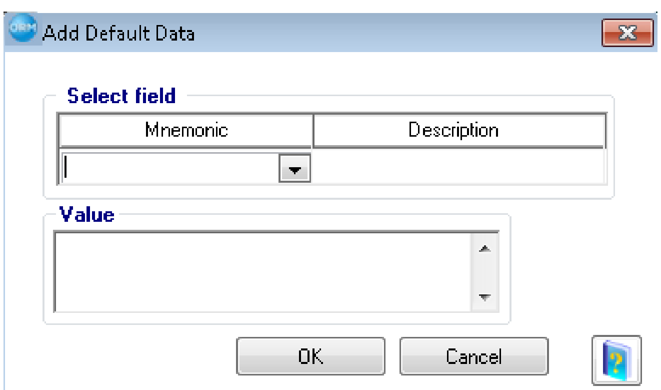
Add Default Fields

1. Click **Add** on the Add/Replace Data screen.

   This screen appears to enable you to add fields to the list and to fill in the default data at the same time:

2. For **Mnemonic**, select a field.

   The field mnemonic and description appear, and the Value box changes to accommodate the field type:



> **Note:** The list of fields you can select from includes only the user-defined fields which are available in the Case Record Form.

3. Enter the default for **Value** and click **OK**.

The Add Default Data screen disappears and the data you entered is displayed in the Message column of the Add/Replace Data screen.

Modify Default Fields

1. Click **Modify** on the Add/Replace Data screen.

   This screen enables you to modify the default data in the field:
2. Enter the default for **Value** field and click **OK**.

   The Modify Default Data screen closes and the data you entered is displayed in the Message column of the Add/Replace Data screen.

Process Default Fields

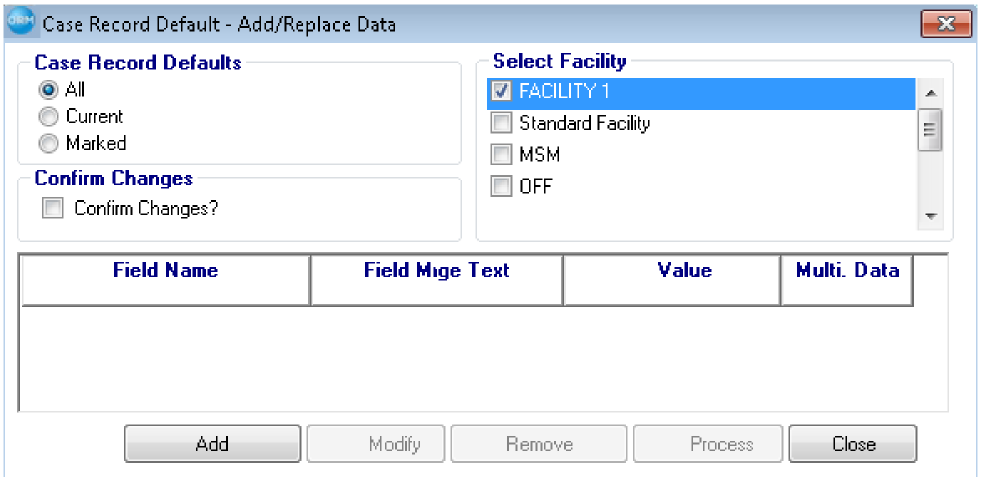
When all of the fields you want to be added, changed, etc., are done, it is time to apply the changes to the fields in the selected default records.

1. (optional) Check **Confirm Changes?** to have the system stop before each change and ask you if you want to apply each change to that particular default record.
2. Click **Process** to apply the changes to the selected default records.

Note: Any changes applied to fields that are not on a particular default record will be lost. *For example:* If you have five records and a particular default field is on the first three of the records but not the other two, only the first three records are affected. If at some later time the field is added to the other two records, it will not have a default value for those records.

Manage Case Record Defaults: Clear Data Screen

You can access the Case Record Default - Clear Data screen by clicking **Clear Data** on the Manage Case Record Default Options screen. The screen opens with a list of the fields that you selected in the Select Fields to be Changed screen:



This is a list of fields from which you want the data to be cleared for the selected default records.

Button Table

This table explains the buttons on this screen:

Button	Description
Add	Click to add a new field to the list of fields to clear. See *Add a Field to be Cleared* below.
Remove	Click to remove the highlighted field from the list.
Process	Click to apply the changes you have made to the selected records. This works the same way as the **Process** button on the Add/Replace Data screen. See *Process Default Fields* on the previous page.
Close	Click to close the screen and return to the Case Record Default Options screen.

Add a Field to be Cleared

1. Click **Add** on the Clear Data screen.

   This screen appears to enable you to add fields to the list to be cleared:

2. In the **Mnemonic** box, select a field.

   The field mnemonic and description appear:

   > **Note:** The list of fields you can select from includes only the user-defined fields which are available in the Case Record Form.

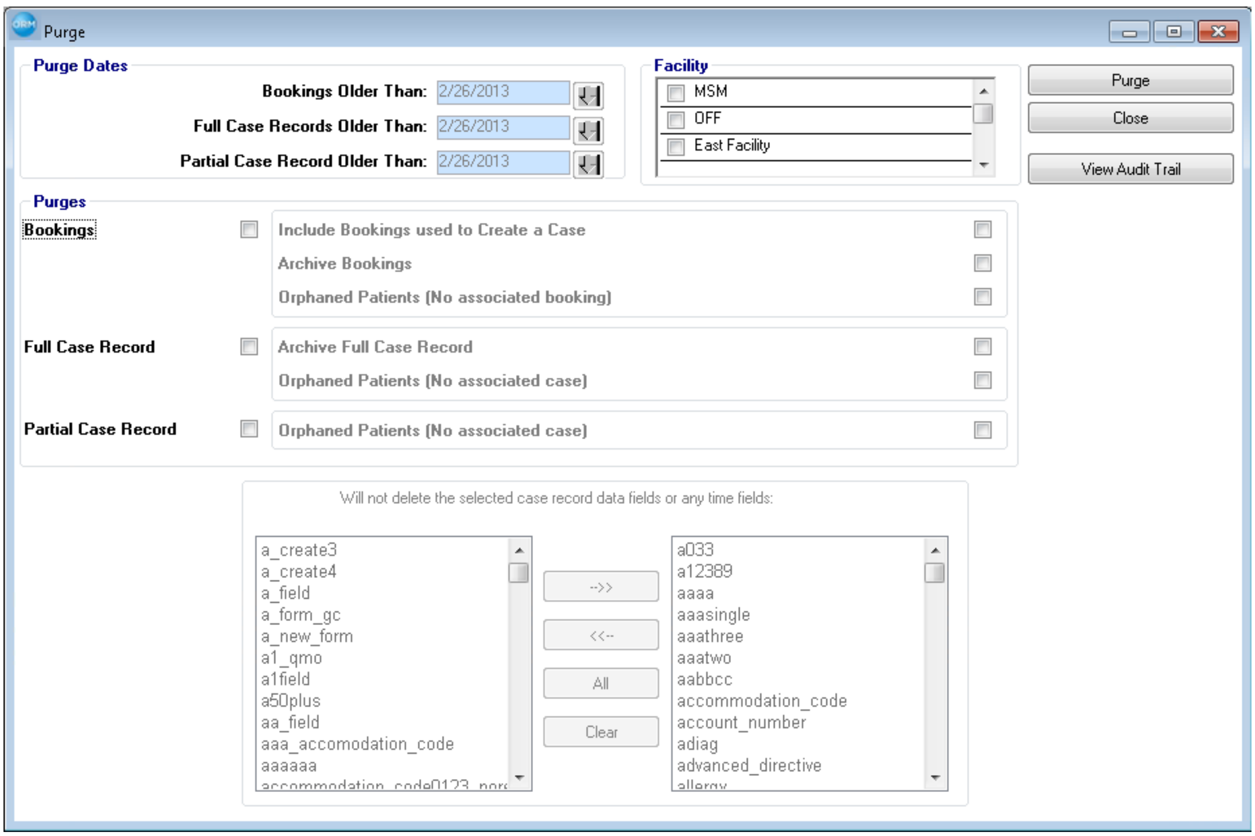
3. Click **OK**.

The Clear Default Data screen disappears and the field is added to the list on the Clear Data screen.

Purge Bookings and Case Records

Menu:Tools > Purge

The Purge screen give you a flexible way to delete old records from your OR Manager database.



Purge Types

There are three basic types of purges that can be performed individually or simultaneously:

1. *Booking Purges.* Purges bookings created before the date entered in the Bookings Older Than: prompt. You can also use the two prompts next to bookings to further refine your bookings purge:
   - **Include Bookings used to Create a Case**: Purges bookings linked to case records.

- **Orphaned Patients (No Associated Booking)**: Purges patients from the OR Manager bookings database if the patient records are older than Bookings: date and have no bookings associated with them.

2. *Full Case Record Purges*. Purges all case records created before the Full Case Records Older Than: date, along with their associated data, including statistics.
   - Orphaned Patients (No Associated Case): Purges patients from the OR Manager case record database if the patient records are older than Full Case Records Older Than: date and have no case record.
3. *Partial Case Record Purges*. The purpose of this option is to preserve selected fields from purged cases for statistical and reporting purposes. This option purges all case record data for cases created before the **Partial Case Records Older Than:** date, *except* for the following two:
   - Data in fields mapped in the Case Record Field Mapping screen.
   - Data in Case Record user-defined fields placed in the right box at the bottom of the screen. Each facility should decide what user-defined fields should not be purged.

In the preceding screenshot, data in the **patient_id** and **pcp user-defined fields** are preserved, as well as the data in the fields mapped in the Case Record Field Mapping screen.

- **Orphaned Patients (No Associated Case)**: Purges patients from the OR Manager case record Database if the patient records are older than **Full Case Records Older Than:** date and have no case record.

See the *OR Manager Configuration Guide*: Case Record Dictionaries.

Purge Records

1. Select **Tools > Purge**.

   The Purge screen appears. Note that only the *Facility* selections and the three *Purges* are active.
2. Select a **Facility** to purge records from. Note that you can only purge one facility at a time.
3. Select one or more **Purges**.

   The Purge Dates and the options associated with each purge you selected become active.
4. Select **Archive Bookings** and/or **Archive Full Case Record** if you want to copy these records to an archive before purging.
5. Enter the **Purge Dates** for the purges you selected.
6. Select the other options, if any, associated with each purge you are performing.
7. If you are doing a partial case record purge and want to exclude some user-defined fields, select the fields in the left box at the bottom of the screen and double-click or use **->>**to move them into the right box.

   > **Note:** You can also use SHIFT + CLICK to select a range of fields or CTRL + CLICK to select multiple individual fields at the same time, then click on **->>** to transfer them to the right box.
8. After you have selected and double-checked all of your purge parameters, click **Purge**.

A warning message appears.

9. If you want to continue, click **Yes**.

   A progress screen opens, followed by a screen indicating that the purge is complete and summarizing what was done.

10. Click **OK** to acknowledge completion of the purge.

Purge Audit Trail

Click **View Audit Trail** on the Purge screen to open the audit trail for booking and case records purges.

11

Picklists and Worksheets

Overview

Picklists and worksheets are special kinds of printed reports that you use to obtain the supplies necessary to perform operations and to set up the OR for the procedures.

Topics discussed in this chapter include the following:

- *Picklists Overview*
- *Picklists by Case Cart*
- *Consolidated Picklists*
- *Picklist Printing Details*
- *Contents Picklists*
- *Worksheets*

Picklists Overview

Picklists are lists of the supply items needed for operations that have been booked but not yet performed. Supplies and numbers for picklists are taken from the preference cards associated with operations at the time that the picklists are printed. Picklists are then used to get supplies from the various inventories and deliver them to the operating rooms when they are needed.

Picklists are designed to allow the efficient picking of supplies. However, options exist to also print notes on picklists (for example, room setup, surgery preferences), which gives you the flexibility to use picklists in rooms for more than just picking supplies.

Note: Print previews of picklists are visual representations of the picklist and may, at times, not look exactly like the printed copy. Always refer to the printed copy of the picklist for an accurate list.

Types of Picklists

There are three types of picklists, determined by how supplies are arranged on the list:

- **Case Cart**: Items are grouped by procedures and operations.
- **Consolidated**: Items for all procedures booked for a given time period are grouped by type on the picklist.
- **Contents**: Not true picklists, but lists of items on Preference cards.

User Defined Picklists and Worksheets

Your OR Manager system is delivered with a standard set of picks lists and worksheets. In addition, administrators can use the Custom Report feature to create custom picklists and worksheets.

Best Practice: Customize Picklists and Worksheets if needed. Administrators can set a flag to turn off assistant quantity. Administrators can turn on manufacturer or vendor numbers. User defined picklists and worksheets have increased in popularity because the freedom provided by the software meets each institution's needs.

Frozen Picklists

Case cart and consolidated picklists are said to be *frozen* as soon as they are printed. This means that the contents of a picklist does not change, even if the contents of the preference card it is based on changes, so that items and quantities that go into the case record are the same as they were when the picklist was printed.

There are two ways to edit supply items and quantities:

- You can edit items and quantities for a particular operation before the picklist is printed by selecting the booking and clicking **Edit Froz Picklist** on the Manage Booking Options screen. Using this option affects only the picklist for a particular operation; the underlying preference card is not changed.

- After the picklist is printed and the case record is built, you can change supply items and quantities in the Exception Noting screen. Again, changes made in Exception Noting do not impact preference cards.

See *Edit a Frozen Picklist* on page 103.

Transmitting Supply Option

For case cart and consolidated picklists, you have the option to transmit Department Requisitions to update your inventory system at the same time you print picklists.

See the *OR Manager Configuration Guide*: Preference Card Supporting Dictionaries.

Picklists by Case Cart

Menu:Tools > Manage Bookings
Menu:Pref Card/Inventory > Picklist

In case cart picklists, items are grouped by procedures and operations so that they can be placed on a case cart in the order in which they are dropped off at the ORs.

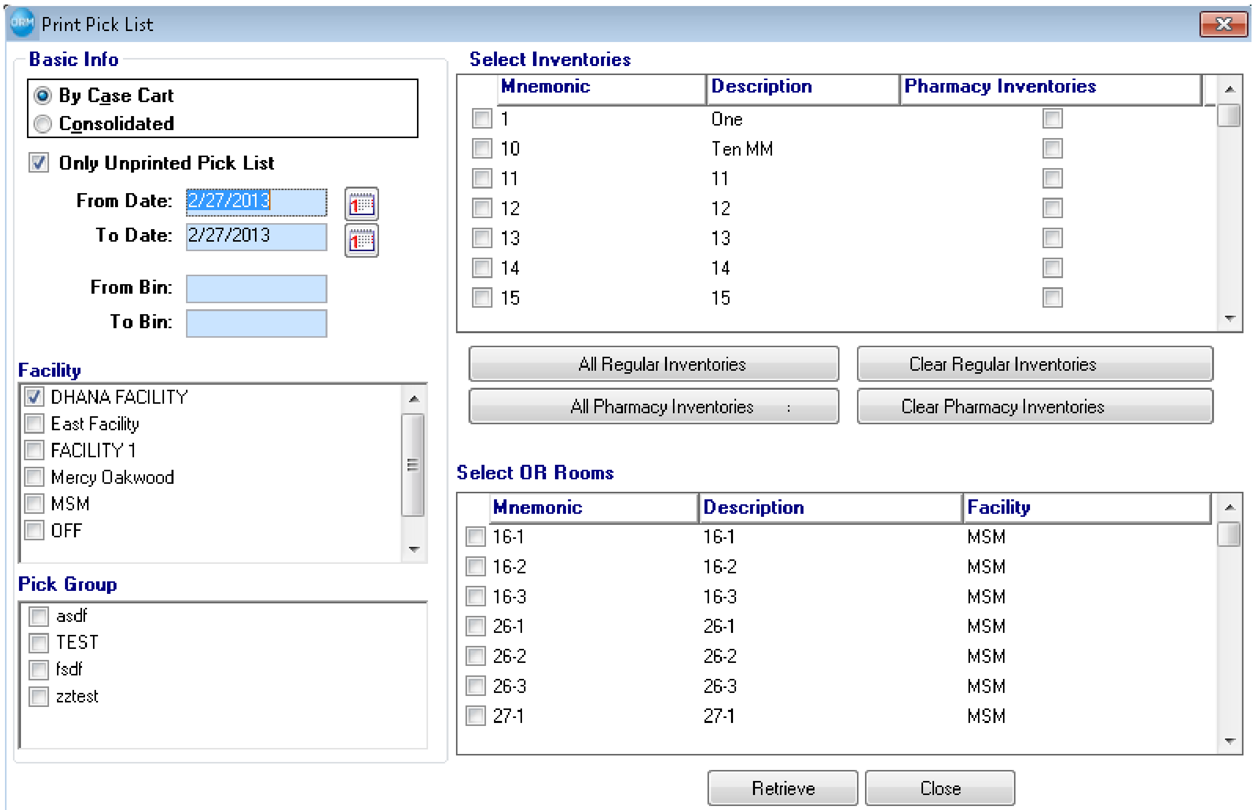
You can print case cart picklists two ways:

- (Recommended) Through the Print Picklist screen from the Pref Card/Inventory menu.
- Through Manage Bookings.

Print a Case Cart Picklist Through Pref Card/Inventory Menu

Note: This table shows how to print picklists if they are not frozen and have preference cards associated with them. If you encounter screens in addition to those shown in this table, see *Picklist Printing Details* on page 251, for a complete explanation.

1. Select **Pref Card/Inventory > Pick Lists**.
2. The Print Pick List screen opens.



3. Select **By Case Cart**.
4. (optional) Clear **Only Unprinted Picklist:** to print those picklists that have been printed previously.
5. In **From Date** and **To Date**, enter or select the range of operation dates for which to print the picklist.
6. (optional) In **From Bin** and **To Bin**, enter the range of bin locations to search within inventories. These are free text fields. For values that are not numeric, OR Manager searches across all bin names that fall alphabetically between the "From" and "To" text strings.
7. (optional) Select the **Facilities or Pick Group, Inventories,** and **OR Rooms** for which you want to print picklists. If you select a Pick Group, the OR rooms linked with it are automatically selected. You cannot deselect these linked OR rooms but you can select additional ones.

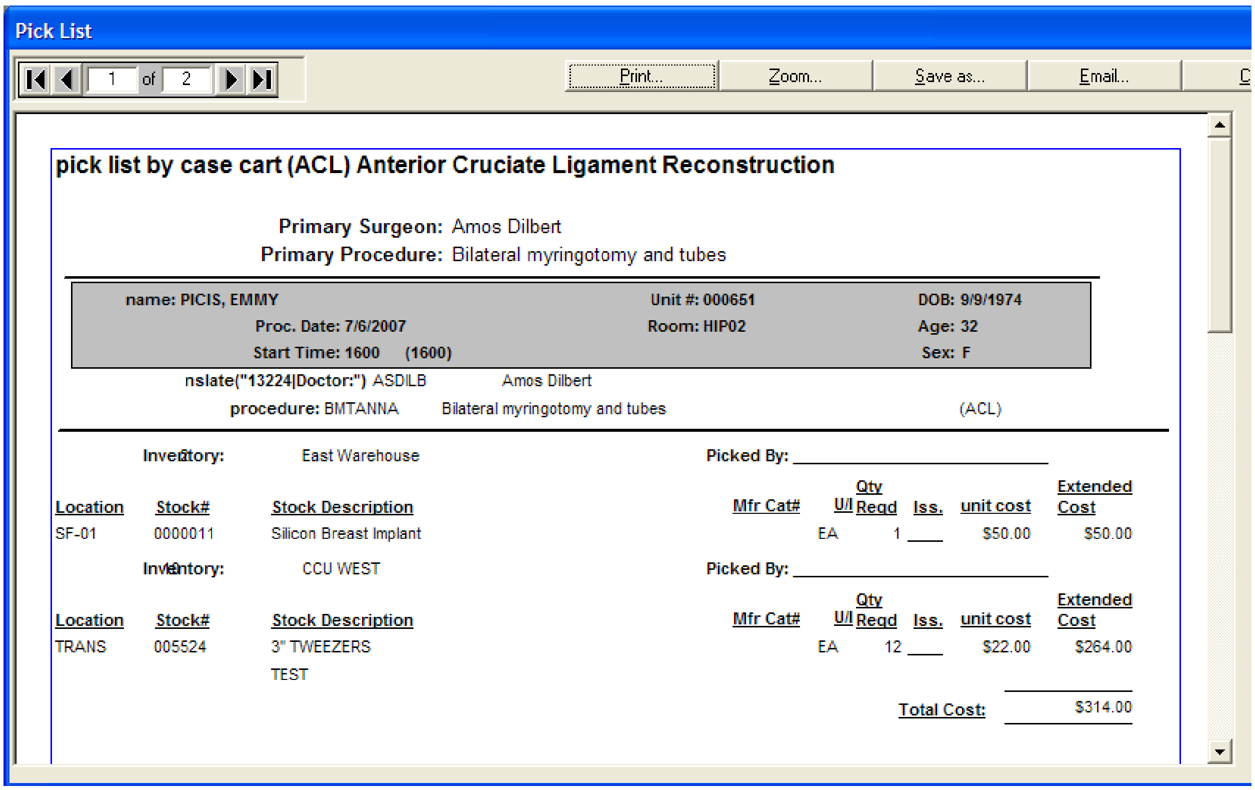
   If you do not select **Inventories** or **OR rooms**, a picklist for all inventories and rooms will be printed. Picklists printed this way include Tray/Pack/Kits.

   Tray/Pack/Kits will *not* print on the picklist if you select inventories. This is because by selecting one or more inventories you are excluding all others. Because there is no inventory for Tray/Pack/Kits, Tray/Pack/Kits are also excluded.

   Tray/Pack/Kits are not affected by room selections.

8. Click **Retrieve**.
9. Picklist processing begins.

   The Case Cart Picklist appears:



   The picklist uses the default user defined picklist format. If there is no default format for this type of picklist, OR Manager uses the standard format.
10. (optional) Click VCR buttons to preview the pages of picklists.
11. To print the picklists, click **Print**.

Print a Case Cart Picklist in Manage Bookings

Note: This table shows how to print picklists if they are not frozen and have preference cards associated with them. See *Picklist Printing Details on page 251*, if you encounter screens in addition to those shown in this table and you need a complete explanation.

1. Select **Tools > Manage Bookings**.
2. Select your **Selection Options**, then click **Retrieve**.

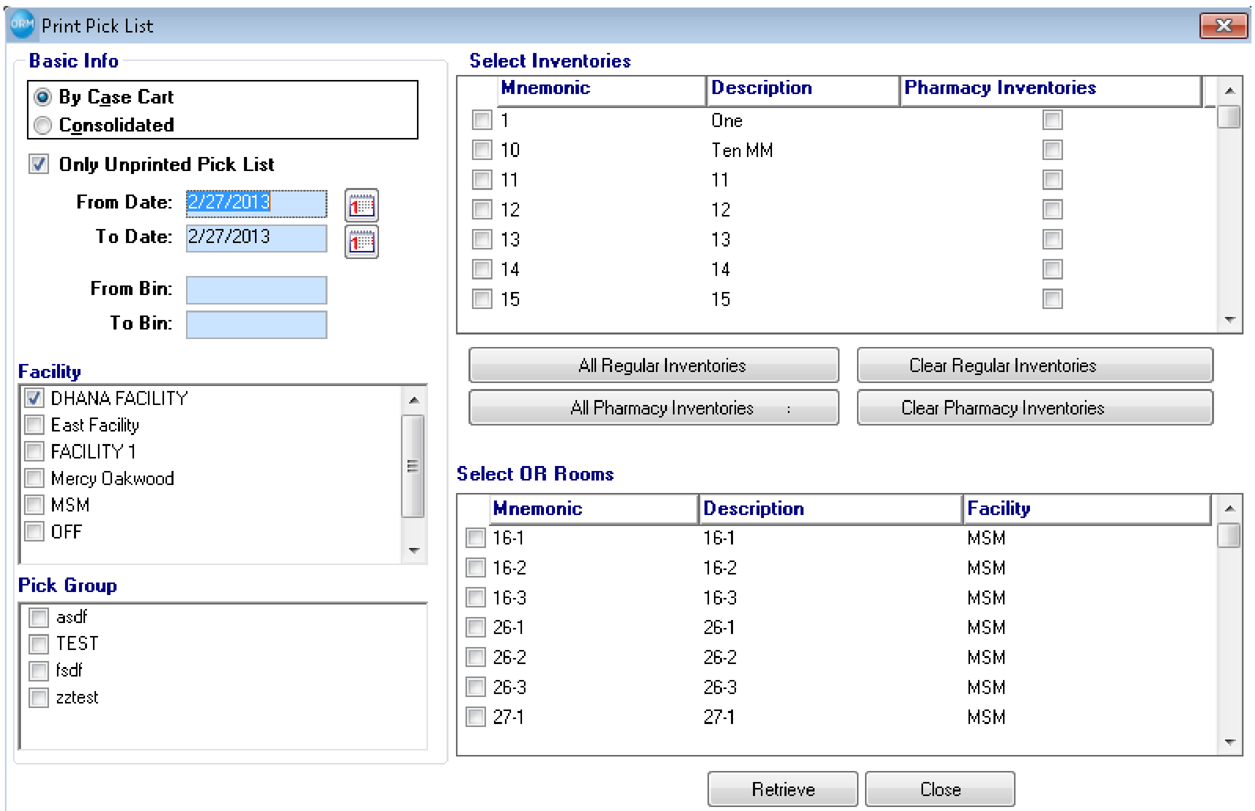
   The Manage Bookings Options screen opens.
3. Check the cases for which you want to print picklists.

4. Click **Picklist**.

   A screen opens to enable you to select printing options.

5. Select the patients you want to print picklists for from the following:

   - **Current**: Only the highlighted patient.
   - **Marked**: All of the records with a check mark in the left column of the Options screen.
   - **All**: All of the records on the Options screen.



6. (optional) Select **From Bin:** and **To Bin:**

7. Clear **Only Unprinted Picklist:** to print those picklists that have been printed previously.

8. (optional) Select the inventories you want to print picklists for by checking the check boxes to the left of each inventory or by clicking **All Regular Inv.** or **All Pharmacy Inv.**

   If you do not select **Inventories**, a picklist for all inventories and rooms will be printed. Picklists printed this way will include Tray/Pack/Kits.

   Tray/Pack/Kits will *not* print on the picklist if you select inventories. This is because by selecting one or more inventories you are excluding all others. Because there is no inventory for Tray/Pack/Kits, Tray/Pack/Kits are also excluded.

Pharmacy inventories are denoted by a checkmark in the box to the right of the inventory. To select a pharmacy inventory, check the box to the *left*of the inventory mnemonic.

9. Click **OK.**

   The Case Cart Picklist appears.

   > **Note:** The picklist uses the default user defined picklist format. If there is no default format for this type of picklist, OR Manager uses the standard format.

10. (optional) Click on VCR buttons preview the pages of picklists.
11. To print the picklists, click **Print**.

See *Manage Screen Searches* on page 92.

See *Picklist Printing Details* on page 251.

Consolidated Picklists

Menu:Pref Card/Inventory > Picklist

Consolidated picklists combine all items for all operations in the date range. This is helpful if supplies are located in multiple inventories, or if you are gathering all the materials for multiple cases and for inventory forecasting.

If you need four scalpels for a morning procedure and 2 for an afternoon procedure, the consolidated list combines them and lists 6 scalpels.

Unlike picklists by case cart, consolidated picklists can only be printed from **Pref Card/Inventory > Picklist**.

If you print the Picklists through **Pref Card/Inventory > Picklists** and select a Pick Group, you are printing the Picklists for the bookings of the specific rooms in the Pick Group.

If you print Picklists through **Tools > Manage Preference Cards > Print Picklist** and select a Pick Group, you are printing the Picklists for the Preference Cards that have stocks associated with the Pick Group.

Print a Consolidated Picklist

> **Note:** This procedure shows how to print picklists if they are not frozen and have preference cards associated with them. If you encounter additional screens, see *Picklist Printing Details* on page 251 for a complete explanation.

When custom picklists print as a batch, the order is first to print rooms that are not in pick groups followed by rooms listed by pick groups that include them.

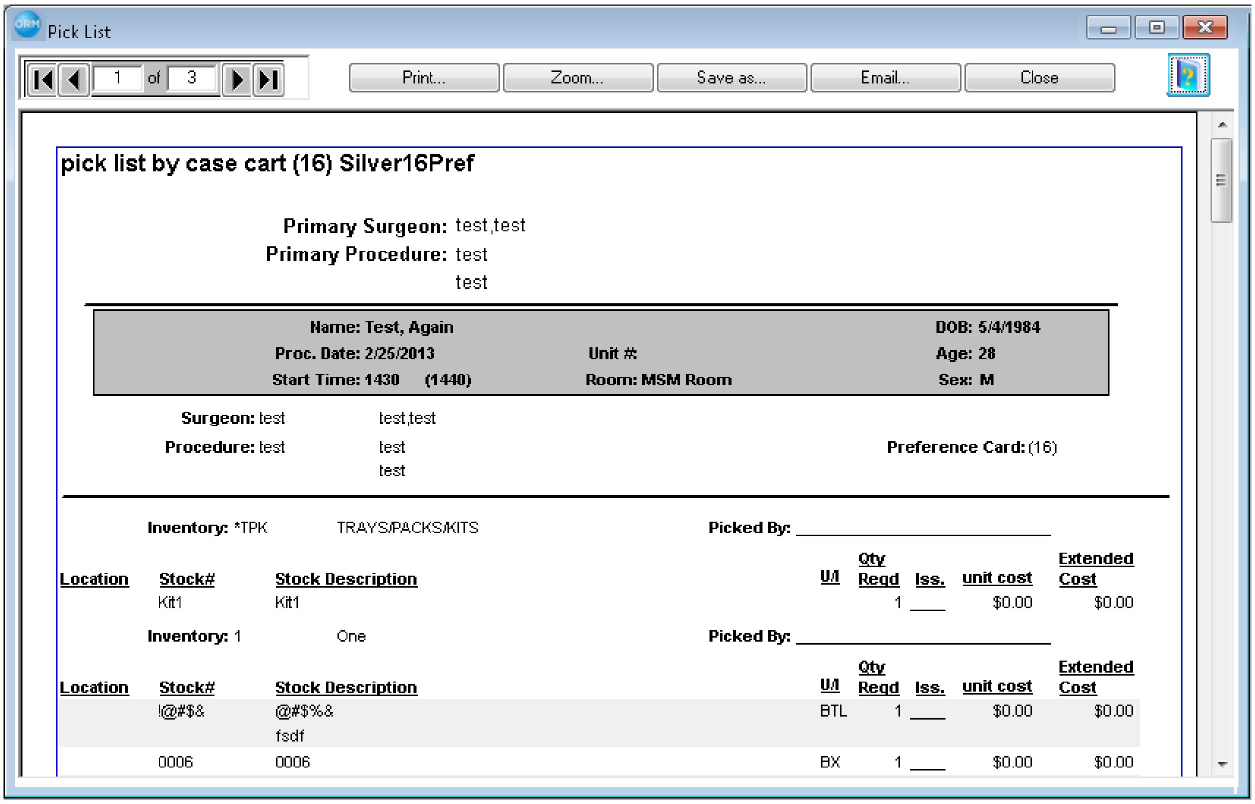
1. Select **Pref Card/Inventory > Picklist**.

   The Print Picklist screen opens.
2. Select **Consolidated**.
3. In **From Date** and **To Date**, enter or select the range of operation dates for which to print the picklist.
4. (optional) Clear **Only Unprinted Picklist:** to print those picklists that have been printed previously.
5. (optional) In **From Bin** and **To Bin**, enter the range of bin locations to search within inventories. These are free text fields.
6. Select the inventories you want to print picklists for by checking the check boxes to the left of each inventory or clicking **All Regular Inventory** or **All Pharmacy Inventory**.

   > **Note:** Pharmacy inventories are denoted by a check-mark in the box to the right of the inventory. To select a pharmacy inventory, check the box to the *left* of the inventory mnemonic.
7. Select the **Facilities** and **OR Rooms** for which you want to print picklists. If you select a Facility that includes Pick Groups, the option to select a Pick Group appears. If you select a Pick Group, you cannot select specific rooms.

   > **Note:** If you do not make any selections for Inventories or OR Rooms, a picklist for all inventories and rooms will be printed.
8. Click **Retrieve**.

   Picklist processing begins. The Consolidated Picklist appears:



9. To print the picklist, click **Print.**

Supply Forecasting

Menu:Pref Card/Inventory > Supply Forecasting

The Print Supply Forecasting Report screen lets you specify a consolidated picklist designed to help in supply forecasting. Its character as a consolidated picklist means that it combines all items for all operations in the date range. The report does not include items in the Tray/Pack/Kit Dictionary.

The picklist that you can specify in the screen is titled Consolidated Picklist Forecasting, and it includes four columns that do not appear in other picklists to help in supply forecasting.

- Balance
- Qty on Hand
- Qty Ordered
- Back Ordered

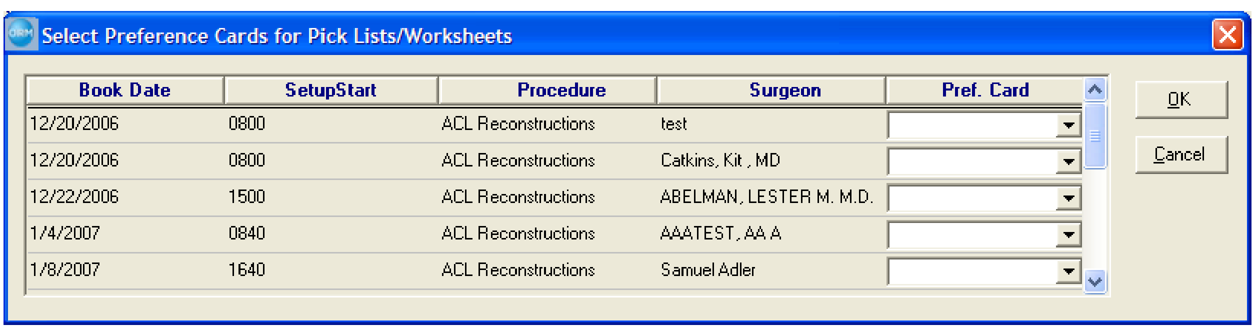
1. Display the screen for specifying the report by clicking **Pref Card/Inventory > Supply Forecasting**.
2. (Optional) **Set Exclude Hold Qty in Balance:** The Hold Quantity is automatically excluded from the Qty on Hand column value. Selecting this option removes the Hold Quantity from the **Balance** column value in addition to the **Qty on Hand** column value.
3. (Optional) **Enter Filter Balance Less than or Equal to**: The value can be negative and can have up to four digits. If you enter a value here, items whose numbers exceed the value are not reported.
4. In **From Date** and **To Date**, enter or select the range of operation dates for which to print the picklist.
5. (optional) In **From Bin** and **To Bin**, enter the range of bin locations to search within inventories. These are free text fields.
6. Select the inventories you want to print picklists for by checking the check boxes to the left of each inventory or clicking **All Regular Inv.** or **All Pharmacy Inv**.

> **Note:** Pharmacy inventories are denoted by a check mark in the box to the right of the inventory. To select a pharmacy inventory, check the box to the left of the inventory mnemonic.

7. Select the **Facilities** and OR Rooms for which you want to print picklists. If you select a Facility that includes Pick Groups, the option to select a **Pick Grou**p appears. If you select a **Pick Group**, you cannot select specific rooms.

> **Note:** If you do not make any selections for Inventories or OR Rooms, a picklist for all inventories and rooms will be printed.

8. Clicking **Retrieve** displays a screen that prompts you to associate preference cards to procedures which have no frozen picklist and which fall within the designated date range.



9. Clicking **OK** displays the consolidated picklist for supply forecasting.

Picklist Printing Details

This topic discusses additional options for printing picklists by case cart as well as consolidated picklists.

Prerequisites

This topic assumes that you have already used the Manage Bookings screen or the Print Picklist screen from the Inventory menu to select the type of picklists and bookings you are printing picklists for.

See *Picklists by Case Cart* on page 243.

See *Consolidated Picklists* on page 247.

Overview

- If your system is not set up to transmit supplies to inventory when picklists are printed, print picklist processing is straightforward: you are asked to specify preference cards for operations that do not already have preference cards, then OR Manager assembles the lists and displays them on a print screen.
- If your system is set up to transmit supplies to inventory when picklists are printed, you will see some prompts in addition to the ones described above.
- These prompts ask whether you want to transmit supplies at that time or, if you have already printed the same picklists and transmitted supplies, if you want to transmit again.
- Inactive tray/pack/kits are not included in printed picklists.

Print Picklists

1. Click **OK** in the Picklist Criteria screen (displayed by the Picklist button on the Manage Bookings Options screen) or **Retrieve** (Print Picklist screen).
2. If presented, clear the procedures you don't want to print picklists for, then click **OK**. (The default is that all procedures are selected.) The frozen picklists for complex bookings print exactly as they were frozen. Other bookings may present another option.

   (If one or more picklists have been frozen, either manually or through previous printing, you will be shown a message indicating that records cannot be retrieved.)

If you click **Yes**, the picklists are treated as unfrozen. That is, they are based on the current contents of the associated preference cards, which may differ from the preference cards as they were when the picklists were frozen.

If you click **No**, the affected picklists contain the same items and quantities as they did when they were frozen.

If one or more of the procedure/surgeon combinations has no preference cards, a screen opens allowing you to select them.

3. Select a preference card to go with each procedure and click **OK**.

   If your OR Manager system is set up to transmit inventory information to your HCIS materials management system when picklists are printed, and the contents of one or more of the picklists have already been transmitted, a screen gives you the following options concerning transmitting bookings:

   - All.
   - Non-Transmitted.
   - None.

4. This screen indicates that the contents of some picklists have been transmitted previously:

   - Click **All**to transmit of all picklist items including those that have already been transferred.

   Note: This option means that some inventory items will be decremented twice.

   - Click **Non-Transmitted** to transmit only those picklist items that haven't been transmitted yet.
   - Click **None**to not transmit any inventory updates for these picklists.

   A series of status bars and messages appears while OR Manager compiles your picklist. Then the picklist appears on the screen.

Note: A system parameter controls whether or not cost information is included on picklists. Contact the Picis Client Center for information.

Contents Picklists

Menu:Tools > Manage Preference Cards

Contents lists, also referred to as Dictionary Picklists, are picklists printed from the Preference Card dictionary. You may use them to pick supplies for add-on cases, but they do not contain patient information. They are also used to print for maintenance purposes. Contents lists are grouped by their associated preference cards and are used for managing (updating, deleting, adding) the items on preference cards.

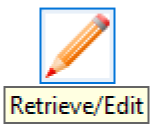
Although you may print contents picklists to pick supplies, you do not have the option of doing inventory transmittals when printing them as you do with other kinds of picklists.

If you print Picklists through **Tools > Manage Preference Cards > Print Picklist** and select a **Pick Group**, you are printing the Picklists for the Preference Cards that have stocks associated with the Pick Group. If you print the Picklists through **Pref Card/Inventory > Picklists** and select a **Pick Group**, you are printing the Picklists for the bookings of the specific rooms in the Pick Group.

Print a Contents List

1. Select **Tools > Manage Preference Cards**.

   The Manage Preference Cards screen opens.
2. Select the combination of preference cards, surgeons, procedures, etc., for which you want to print cards.
3. Click the **Retrieve/Edit** button.

   The Manage Preference Card Options screen opens.
4. Select one or more preference cards and click **Print Picklist**.

   A screen allows you to specify cards you want in the list.

   If your site has multiple facilities, you are prompted to choose a facility to print the picklist for.
5. If your site has multiple facilities, select a facility. If the facility has pick groups, the option to select a pick group appears, but you are not required to select one. Click **Select**.

   The Picklist Contents screen opens.

   The picklist uses the default user defined picklist format. If there is no default format for this type of picklist, OR Manager uses the standard format.

   Note: If you print the picklist and later you print the worksheet, the modified supplies are printed rather than the supplies that appear on the preference card.

See the *OR Manager Configuration Guide*: Manage Preference Cards.

Worksheets

Menu:Tools > Manage Bookings
Menu:Pref.Card/Inventory > Worksheets

You typically use worksheets to prepare a room for surgery or Pre-admit Testing. Worksheets are different from picklists in that they are room-specific, and they list the items by section so the items can be arranged properly within the room.

Also, worksheets contain case notes, which are free-text notes often used to list the surgeon's personal preferences. As with picklists, the items and quantities on worksheets are taken from preference cards.

For sites where the operating room staff normally picks supplies and the staff is familiar with the location of stock items, worksheets can be used instead of picklists for picking supplies for cases. However, picklists must still be printed in order to freeze supplies for the case.

Worksheet Sort Order

Worksheets sort first by an internal booking number, then book surgeon sequence, book procedure sequence, preference card section number, and by finally row number within each section. (The sort is slightly different if you are including inventory location in the sort.)

Custom worksheets have multiple sort options. When custom worksheets print as a batch, the order is first to print rooms that are not in pick groups followed by rooms in pick groups listed by the pick groups that include them.

Note: Worksheets are designed to represent a "copy" of a single preference card. For this reason, items defined as collapsible appear on worksheets as built in preference cards (the collapsible status of items is ignored on worksheets).

Worksheet Example

Worksheet for Booking

Preference Card: TOTHIPAARN Total Hip Arthroplasty - Dr. Aarons

Name: Martinek, Kevin J **Unit #:** MR0009876557 **DOB:** 11/18/76 **Sex:** M
Proc. Date: 1/31/03 **Start Time:** 0830 (0900) **Room:** EV_05 **Age:**

Doctor: AARONS N Aarons, Nathan
Procedure: TOT HIP Arthroplasty Total Hip

Position

Lateral on hip positioning hip table insert with padded blankets and gel pads.
Venodyne boot to unaffected leg. Pillow for arms.

Prep

Betadine scrub and paint.

Packs and Drapes

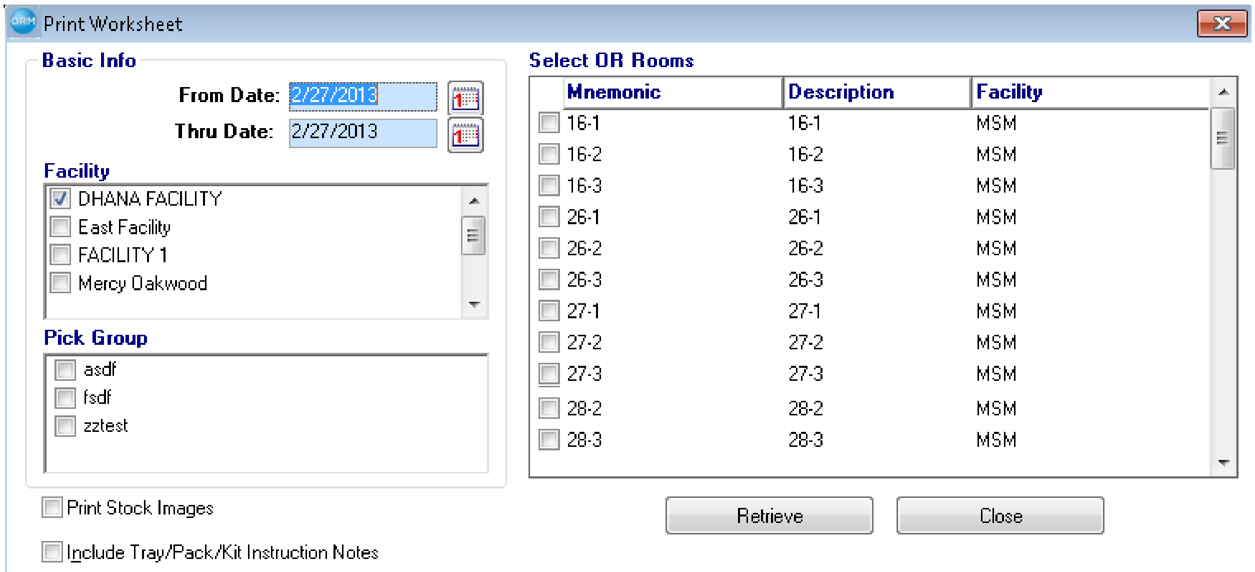
Inv/Stock#	Item Description	U/I	Srg	As1	As2	Comments	Fig. No.
EVCSR/5500020	PBDS Total Hip FD/MN	EA	1	0	0		
EVCSR/5500021	Drape Poly U #8475	EA	1	0	0		
EVCSR/5500022	Drape Ioban 6651	EA	1	0	0		

Note: Print previews of picklists are visual representations of the picklist and may, at times, not look exactly like the printed copy. Always refer to the printed copy of the picklist for an accurate list.

Print Worksheets

1. Select **Pref.Card/Inventory > Worksheets**.

   The Print Worksheet screen opens.



2. Select a **Date** range and **OR Rooms**.
3. Select one or more facilities. If you select a facility that includes a pick group, the option to select a pick group appears, but you do not have to select a pick group. If you select a pick group, you cannot select specific OR rooms.
4. Select **Print Stock Images** to have stock images appear on your worksheet.
5. Click **Retrieve**.

   The Select Procedures in Complex Bookings to Include in Picklists/Worksheets screen opens. This screen displays operations with multiple procedures. The procedures that have procedure and/or surgeon preference cards are selected by default.

   Note: Depending on how your system parameters are set up, the Select Complex Procedures screen may not be available at your site.

6. Select the procedures you want to appear on the worksheet from the **Process?** column.
7. Click **OK**.

   The Select Preference Cards for Picklists/Worksheets screen appears. This screen displays a list of procedures on bookings for which there are no associated preference cards.
8. Select a preference card for each procedure, then click **OK**.

   OR Manager retrieves the Worksheet(s). Depending on the number and complexity of the worksheets, this may take a few minutes.

Note: The worksheet uses the default user defined worksheet format. If there is no default format for this type of worksheet, OR Manager uses the standard format.

12

Reports

Overview

You can use OR Manager’s standard report writing features to generate pre-formatted reports.You can generate reports on a wide variety of data and make the reports as specific, or as general, as you like. Buttons on the top of the screen allow you to scroll through the report, and to **Print**, **Zoom** (in/out on), **Save**, and **Close** the report.

This chapter provides detailed instructions for the following OR Manager standard reports:

- *OR Schedule Report*
- *Schedule Reports*
- *Utilization Reports*
- *Block Time Utilization Reports*
- *Surgeon Utilization Report*
- *Room Utilization Reports*
- *Surgeon Average Case Length*
- *Preference Card Usage Analysis*
- *Preference Card Inactive Stock Reports*
- *OR Turnaround Statistics*
- *Cost Analysis Report*

- *Conflict Override Report*
- *Implant Expiration Report*

If you cannot make any of the pre-formatted reports meet your needs, see the information about external reports in the *OR Manager Configuration Guide* to learn about creating your own reports. Another option is the OR Intelligence product, which delivers a high degree of freedom and minimal expenditure of time in composing of reports. See also *Running External Reports* on page 305

Note: For Quality Measure reports, please see the *Quality Reporting Tool Configuration and User Guide*. The Quality Reporting Tool runs in a web browser, and it collects data for reporting Quality Measure to government agencies.

OR Schedule Report

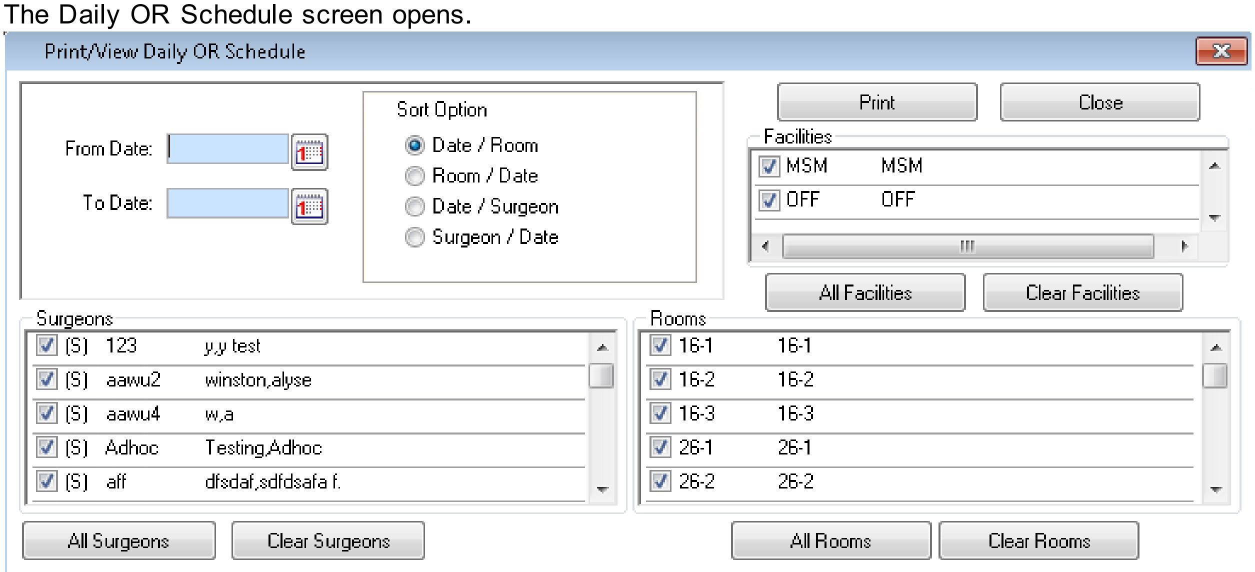
Menu:Reports > OR Reports

The OR Schedule Report allows you to see a daily view of the OR schedule while letting you specify which surgeons and rooms you want included in the report.

Generate an OR Schedule Report

1. Select **Reports > OR Schedule**.

   The Daily OR Schedule screen opens.



2. Specify **From** and **To Date, Sort Option,** and **Facility**.

3. Select the **Surgeon(s)** and **Room(s)** you want included in your report. (The default is to select all.)
4. Click **Print**.

   Your Daily OR Schedule Report appears.
5. You can move through the pages of the report by clicking the controls in the upper left-hand corner of the screen.

Schedule Reports

Menu:Reports > Schedules

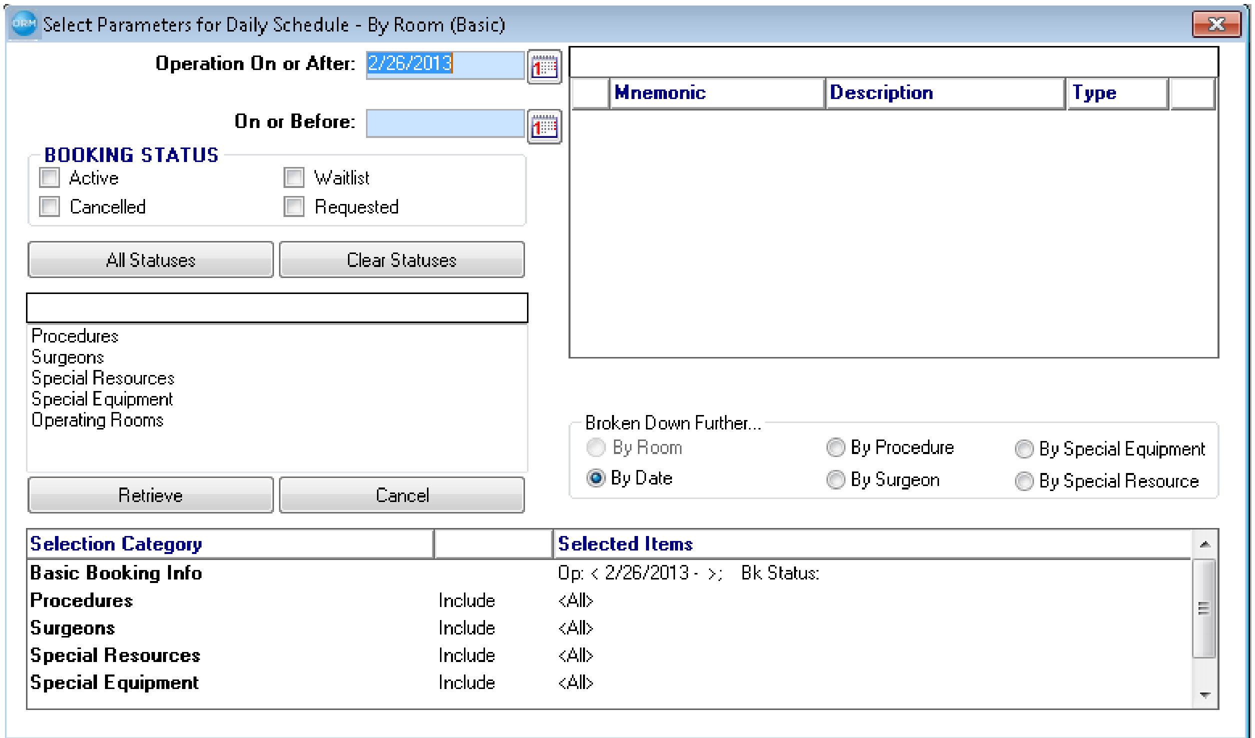
OR Manager's Schedule Reports give you many options for viewing and printing OR booking schedules.

Generate an OR Booking Schedule Report

1. Select **Reports > Schedules**.

   The OR Booking Schedule Selections screen appears.
2. Highlight the type of report you want to see, then click **OK**.

   The Parameters screen opens.

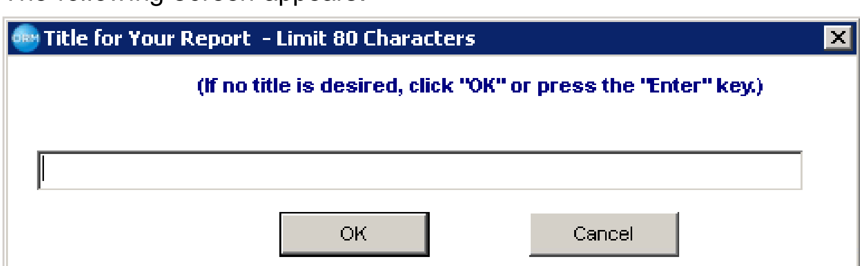


3. Enter a date range and select the **Booking Status**(es) you want to see.
4. **Selection Options** work like the Select Options in the manage screens. Use it to further refine your search.
5. Under **Broken Down Further**, select how you want your report sorted.

> ***Example:*** If you are generating a report including all surgeons' daily schedules for the month, select **By Procedure** to also include what procedure each surgeon is scheduled to perform.

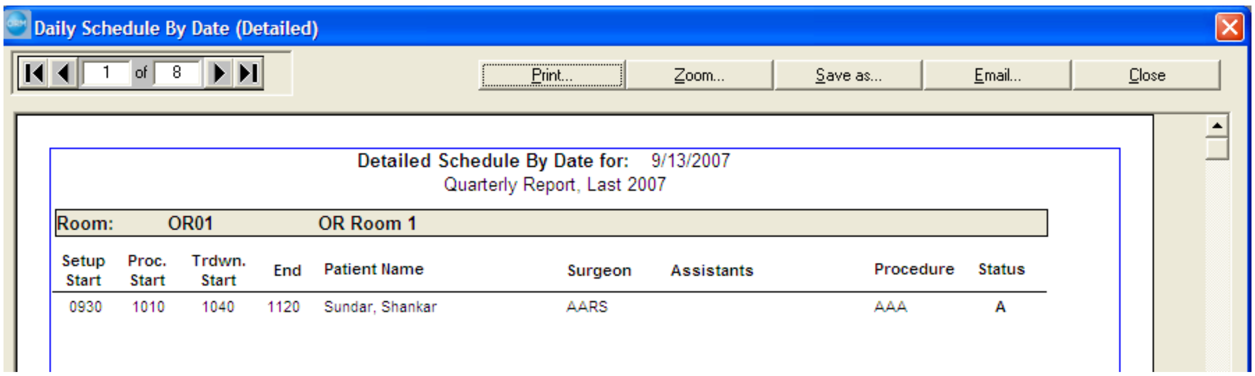
6. After selecting your parameters, click **Retrieve**.

   The following screen appears.



7. If necessary, give your report a title and then click **OK**.

   Your report appears.



See *Manage Bookings Search Screen Features on page 92*.

Utilization Reports

Menu:Reports > Block Time Utilization
Menu:Reports > Surgeon Utilization
Menu:Reports > Room Utilization

The OR Manager Utilization Reports provide statistics showing you how efficiently your facility is using block times, surgeons, and operating rooms. This section provides general information and instructions on how to create Utilization Reports. The following three sections give specific details on each report.

Before Generating Utilization Reports

Remember the following points before you begin generating your Utilization Reports:

- The data appearing on Utilization Reports comes from your case records database, so times (durations) are based on the criteria specified in the Case Records Field Mapping dictionary.
- Cases must be placed in a **Completed** status before they can appear on your Utilization Reports.

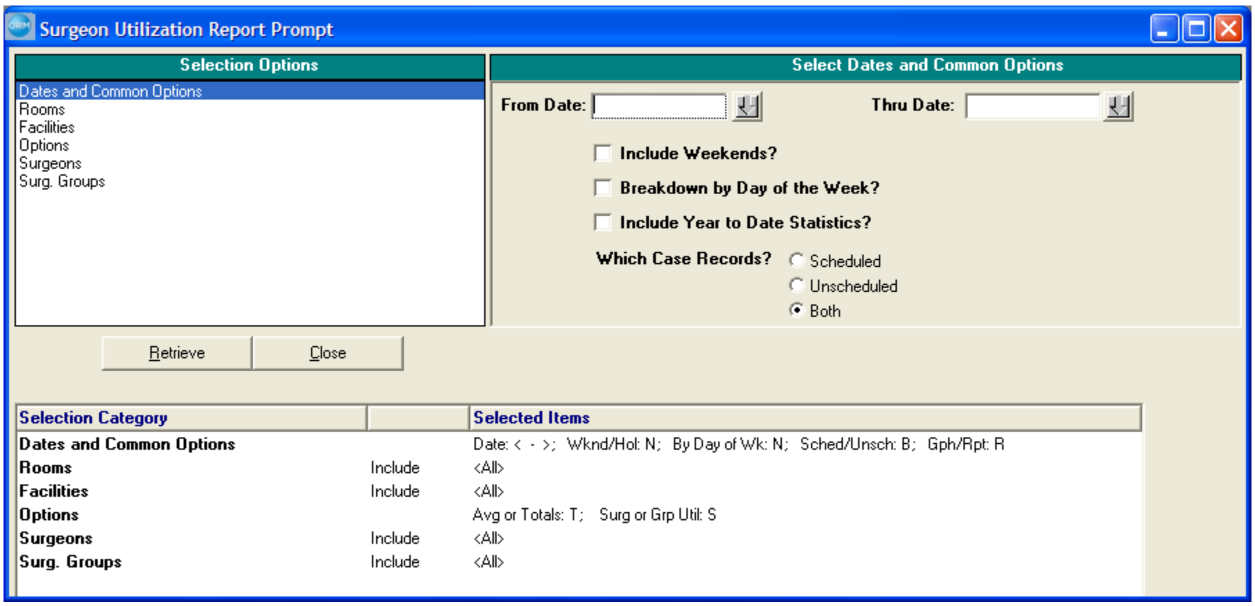
Best Practice: Understand the Utilization Reports by understanding their sources.

To develop your understanding of the Utilization Reports, learn about the case record field mappings that define the data in the reports. The *OR Manager Configuration Guide* explains case record field mappings and the Case Record Field Mapping Dictionary.

Generate a Utilization Report

1. Select the type of Utilization Report you want from the Reports menu.

   The associated Utilization Report Prompt screen appears:



2. **Selection Options** work like the Select Options in the manage screens. Use it to further refine your search.

   Note: Each utilization report has different **Options**. These options are explained for each type of Utilization Report, starting with *Block Time Utilization Reports* on the facing page.

3. **Include Weekends**. Check to include cases performed on weekends.
4. **Breakdown by Day of the Week**. Check to break the report down into days. This makes the report much longer.
5. **Which Case Records**. Scheduled case records are those linked to specific bookings; unscheduled case records are not linked to bookings.
6. Click **Retrieve**.

   Your Utilization Report appears.

See *Manage Bookings Search Screen Features* on page 92

Block Time Utilization Reports

Menu:Reports > Block Time Utilization

Block Time Utilization Reports allow you to see how efficiently your block time is being used.

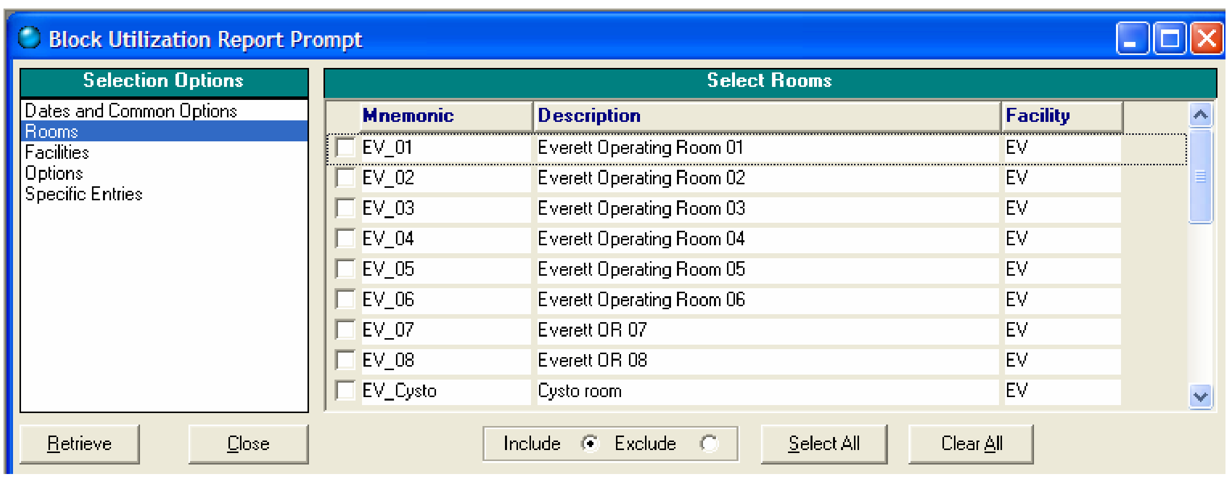
Generate a Block Time Utilization Report

1. Select **Reports > Block Time Utilization**.

   The Block Utilization Report Prompt screen opens.
2. Select the data you want to appear in your report under **Selection Options**. (See *Generate a Utilization Report* on the previous page)
3. After selecting the data you want from choices that appear for **Selection Options**, click **Retrieve**.

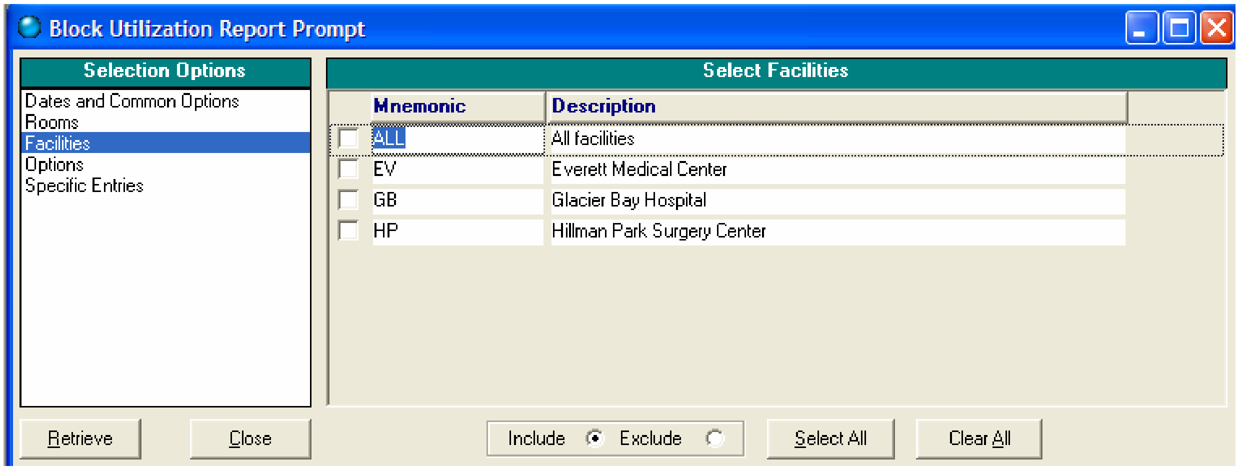
   Your Block Time Utilization Report appears.

Rooms



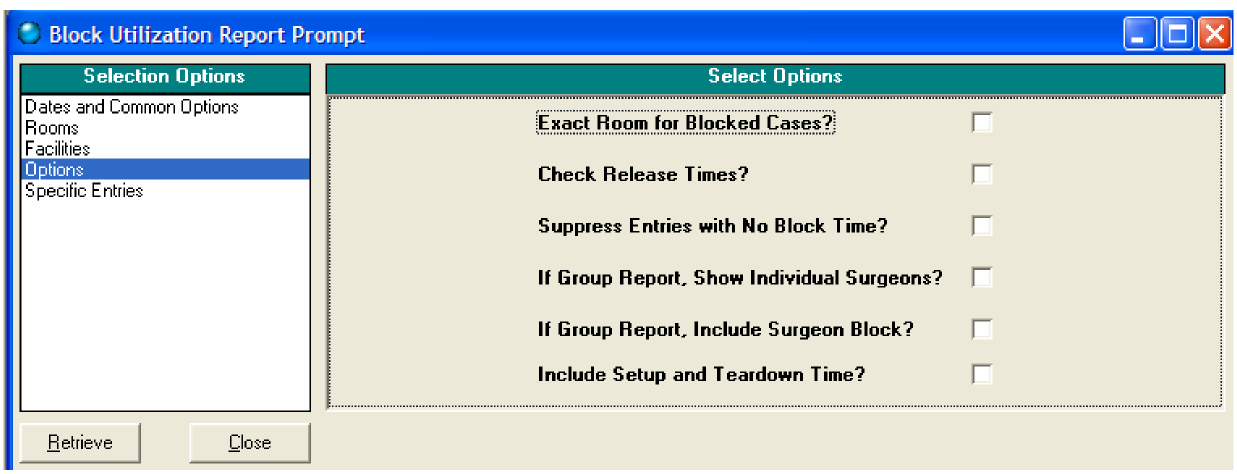
Make any selections on this page if you only want specific rooms where Surgeons/groups, etc. may have worked. If you wish to have all rooms selected, there is no need to check any rooms and all will be included in the report.

Facilities



Making a selection on this page might be easier if you wish to separate a report without having to choose all the rooms related to that facility on the previous page. Again, nothing checked will run the report for all facilities.

Options



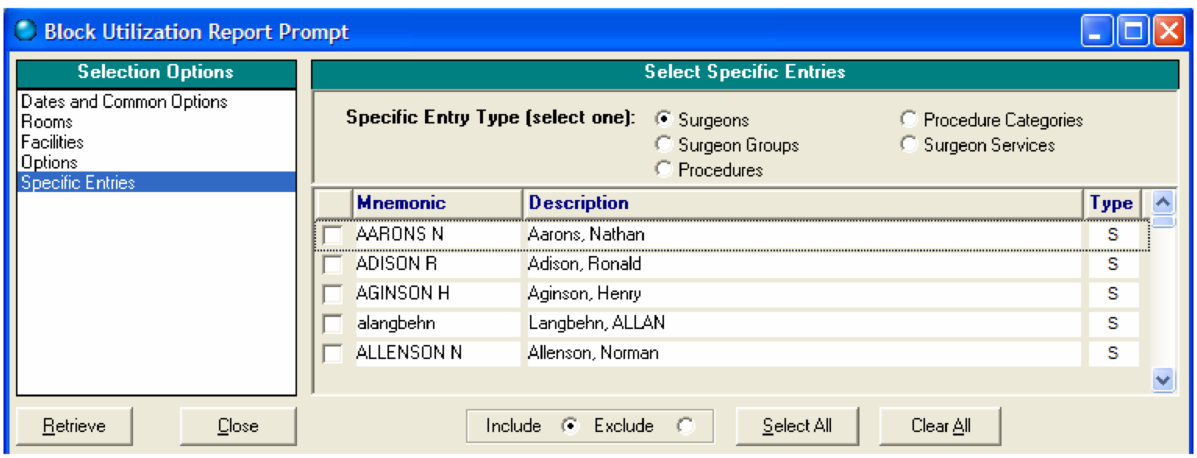
The **Options** menu item under **SelectionOptions** contains the following choices:

- **Exact Room for Block Cases?**: Select to include only cases performed in a particular room within the block time. Do not select this if you want to include cases that were performed within the block time, but were performed in a different room.
- **Check Release Times?**: Select if you want to include only cases booked before a block time was released. Do not select this if you want to include cases booked within the usual block time, but booked after a block time was released.

- **Suppress Entries with No Block Time?**: Select to omit entries with no booked block times within the **Period to Date** and **Year to Date**. Do not select if you want all entries to appear on the report, whether they have booked block time cases or not.
- **If Group Report, Show Individual Surgeons?**: Select if you are generating a Group Report and want individual surgeons, who are not part of the group, to appear.
- **Include Setup and Teardown Time?**: Select to include setup and teardown times in the Block Time Utilization Report.
- **If Group Report, Include Surgeon Block?** : Select to check for surgeon individual time as well as group time when tallying blocks for groups.

Note: The group gets credit for the surgeon's time as well as the group time. Because surgeons can be in multiple groups, the same surgeon's block time is added to every group the surgeon is in for the report.

Specific Entries



On this screen the selection options determine what type of report is created/printed. If all entries are desired there is no need to check any entry nor click **Select All**, all items from the list are included automatically when nothing is selected. Only one option can be selected at a time and the report cannot mix block types on the same reporting structure. The only exception to this is selecting Surgeon Groups and using options on the previous Options page for "If Group report…" selections. There are options near the bottom of the screen to Include or Exclude entries as well.

Report Stats

The following graphic is a typical Block Time Utilization Report. This section explains the data in it.

medSURG Surgeon Block Time Utilization Report

Totals NOT Including Weekends and Holidays
ALL CASES - Scheduled or Unscheduled
Between 01/18/2001 and 03/19/2001

	Period to Date									Year to Date								
Surgeon	Total Cases	Total Time	Block Time	Block Used	%	Block Unused	%	Non-Bl Used	%	Total Cases	Total Time	Block Time	Block Used	%	Block Unused	%	Non-Bl Used	%
ABRAMSON,MITCHEL	15	1:00	28:00	0:00	0%	28:00	100%	1:00	100%	16	1:00	58:00	0:00	0%	58:00	100%	1:00	100%
Mon (9, 12)	3	0:00	24:00	0:00	0%	24:00	100%	0:00	0%	3	0:00	48:00	0:00	0%	48:00	100%	0:00	0%
Tue (8, 11)	2	0:00	4:00	0:00	0%	4:00	100%	0:00	0%	2	0:00	10:00	0:00	0%	10:00	100%	0:00	0%
Wed (8, 11)	1	1:00	0:00	0:00	0%	0:00	0%	1:00	100%	2	1:00	0:00	0:00	0%	0:00	0%	1:00	100%
Thu (9, 11)	1	0:00	0:00	0:00	0%	0:00	0%	0:00	0%	1	0:00	0:00	0:00	0%	0:00	0%	0:00	0%
Fri (9, 11)	8	0:00	0:00	0:00	0%	0:00	0%	0:00	0%	8	0:00	0:00	0:00	0%	0:00	0%	0:00	0%
Dr. Artusio	2	0:00	80:00	0:00	0%	80:00	100%	0:00	0%	2	0:00	110:00	0:00	0%	110:00	0%	0:00	0%
Mon (9, 12)	0	0:00	0:00	0:00	0%	0:00	0%	0:00	0%	0	0:00	0:00	0:00	0%	0:00	0%	0:00	0%
Tue (8, 11)	1	0:00	0:00	0:00	0%	0:00	0%	0:00	0%	1	0:00	0:00	0:00	0%	0:00	0%	0:00	0%
Wed (8, 11)	0	0:00	80:00	0:00	0%	80:00	100%	0:00	0%	0	0:00	110:00	0:00	0%	110:00	100%	0:00	0%
Thu (9, 11)	1	0:00	0:00	0:00	0%	0:00	0%	0:00	0%	1	0:00	0:00	0:00	0%	0:00	0%	0:00	0%
Fri (9, 11)	0	0:00	0:00	0:00	0%	0:00	0%	0:00	0%	0	0:00	0:00	0:00	0%	0:00	0%	0:00	0%

	Period to Date								
Surgeon	Total Cases	Total Time	Block Time	Block Used	%	Block Unused	%	Non-Bl Used	%
ABRAMSON,MITCHE	15	1:00	28:00	0:00	0%	28:00	100%	1:00	100%
Mon (9, 12)	3	0:00	24:00	0:00	0%	24:00	100%	0:00	0%
Tue (8, 11)	2	0:00	4:00	0:00	0%	4:00	100%	0:00	0%
Wed (8, 11)	1	1:00	0:00	0:00	0%	0:00	0%	1:00	100%
Thu (9, 11)	1	0:00	0:00	0:00	0%	0:00	0%	0:00	0%

The caption in the report's upper left-hand corner shows the type of report that was specified.

The header below the caption displays a description of the parameters selected in Selection Options when report was being created. There are also additional criteria listings at the end of the report.

Below are explanations of the Block Time Utilization Reports Statistics. Period to Date stats (shown in the example above) are from the date range selected on the Block Time Utilization Prompt screen.

- **Days of the Week**: The first number in parentheses to the right of each day tells you how many Mondays, Tuesdays, etc. occurred within the date range specified. The second number tells you how many Mondays, Tuesdays, etc. occurred from the beginning of the year until the End Date of the date range specified.
- **Total Cases**: The total cases performed by this surgeon.
- **Total Time**: The total number of hours and minutes this surgeon spent performing cases.
- **Block Time**: Total available block time (in *hours:minutes*) for the specific surgeon.
- **Block Used**: Total time this surgeon spent performing cases within the block time.

- **% (of block used)**: Percentage of the total Block Time that was actually used (Block Time/Block Used).
- **Block Unused**: Total block time that was not used (Block Time minus Block Used).
- **% (of block unused)**: Percentage of block time that was not used (Block Unused/Block Time).
- **Non-Block Used**: The total time the surgeon spent outside the defined block (Total Time minus Block Used).
- **% (of non-block used)**: Percentage of a surgeon's time used outside the block.

Year to Date

The Year to Date information of the Block Time Utilization Report shows the same statistics as the Period to Date information. The Year to Date is from January 1 until the second (latest) date in the date range (Period to Date).

You have the option of changing the Year to Date so it starts on the first day of your fiscal year. Contact the Picis Client Center to make this change.

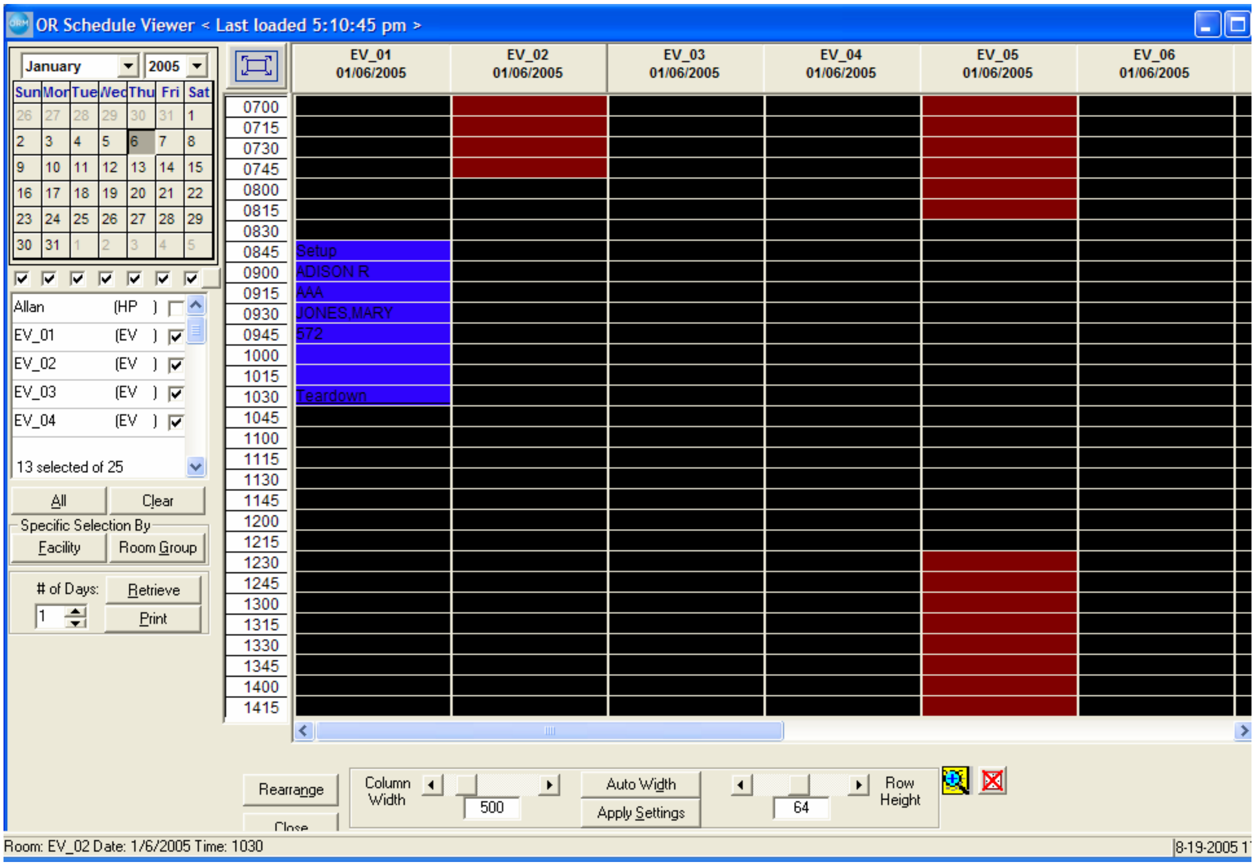
Report Totals

Important: Totals shown at the bottom of reports are for all surgeons, even if they are not included in this report.

The Effect of Specific Parameters on Block Time Utilization Reports

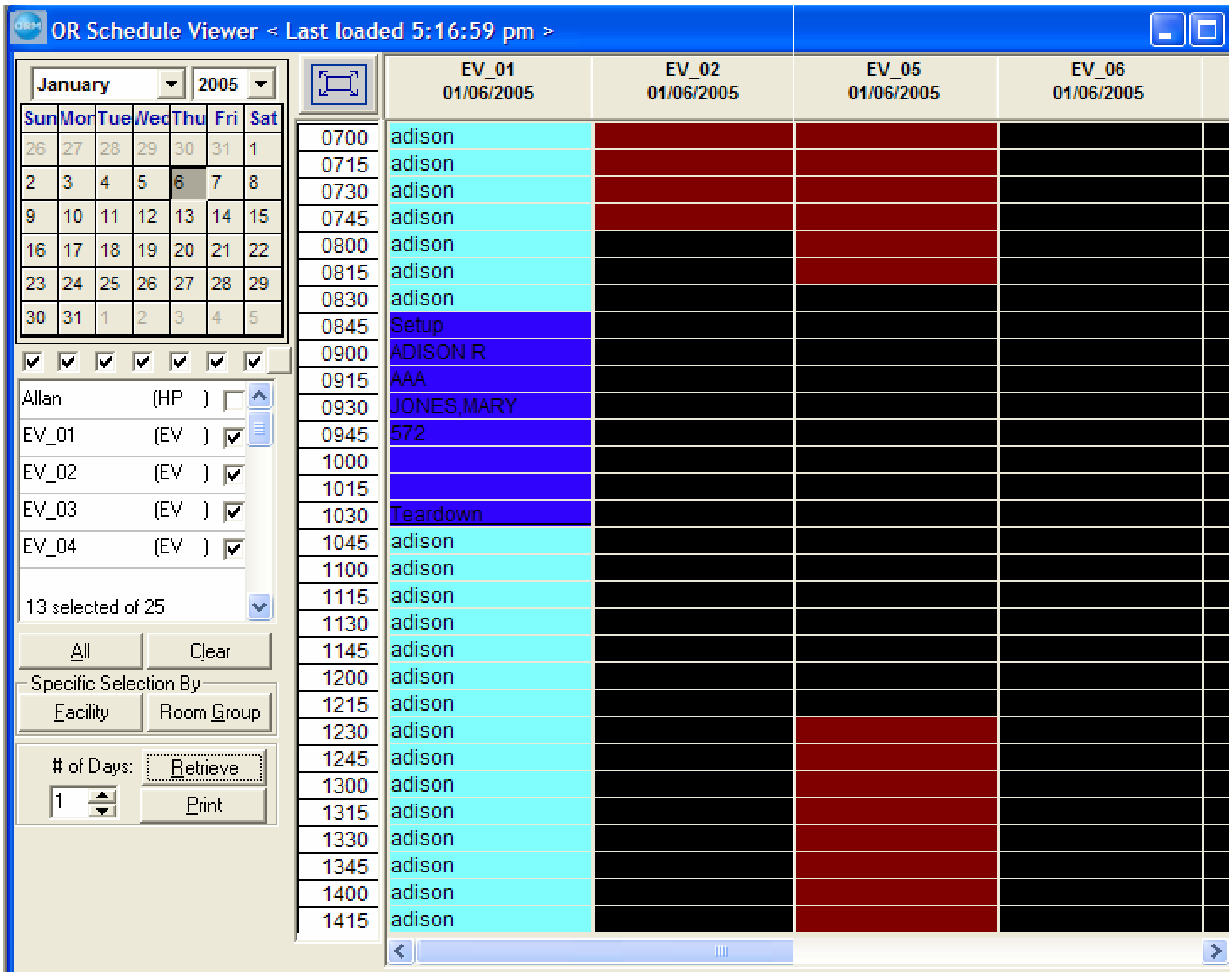
Example 1

The following graphic shows an example of block time assigned to Dr. Adison as it would have looked on the day of surgery 01/06/2005. The block disappears after the assigned release hours in the block parameters passes which is considered an automatic release within the system.



Example 2

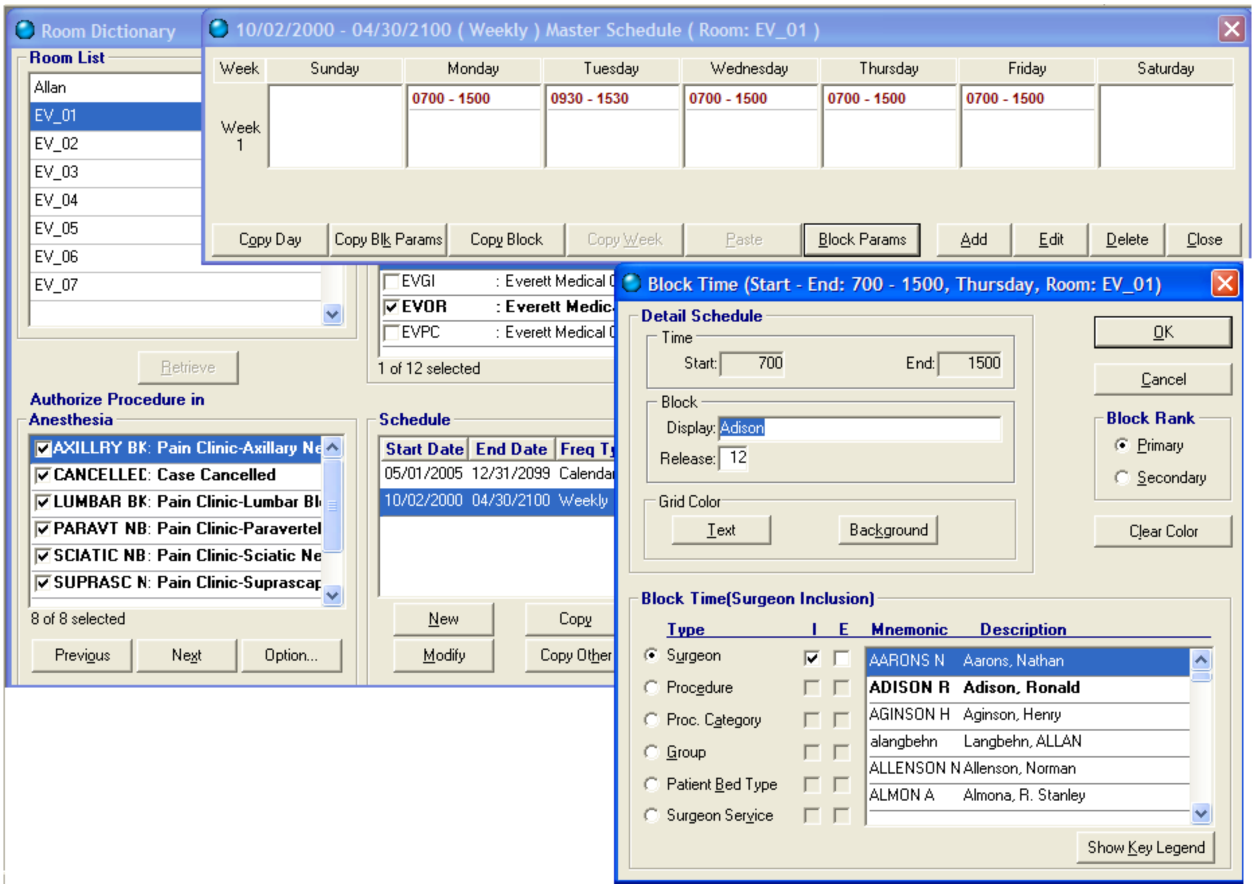
The next graphic shows how this block appeared on 01/05/2005, before Dr. Adison was scheduled on the grid.



The light blue area above shows the block assigned to Dr. Adison from 0700 to 1500, and the dark blue area is the booking.

Example 3

The block defined on the schedule viewer in the previous examples would be defined using the parameters displayed below. This example shows that Dr. Adison has a block on Thursdays from 0700 to 1500 with 12 hours release time in EV_01. Any bookings placed in the defined block time that have associated case records **andPatient In room** and **Out of room** times between 0700 and 1500 are included in the Block Used column of the BTU report.



The additional parameters on the report represent the following scenario:

Dr. Adison performed his procedure in EV_05 on 01/06/05 because an emergency for another surgeon came up early that morning, and the charge nurse decided to place the emergency in EV_01. Dr. Adison's bookings were originally placed in EV_01. Now in completed status, you run the BTU report using only the date parameters.

Example: **From Date** = 01/06/2005 and **To Date** = 01/06/2005

OR Manager Surgeon Block Time Utilization Report

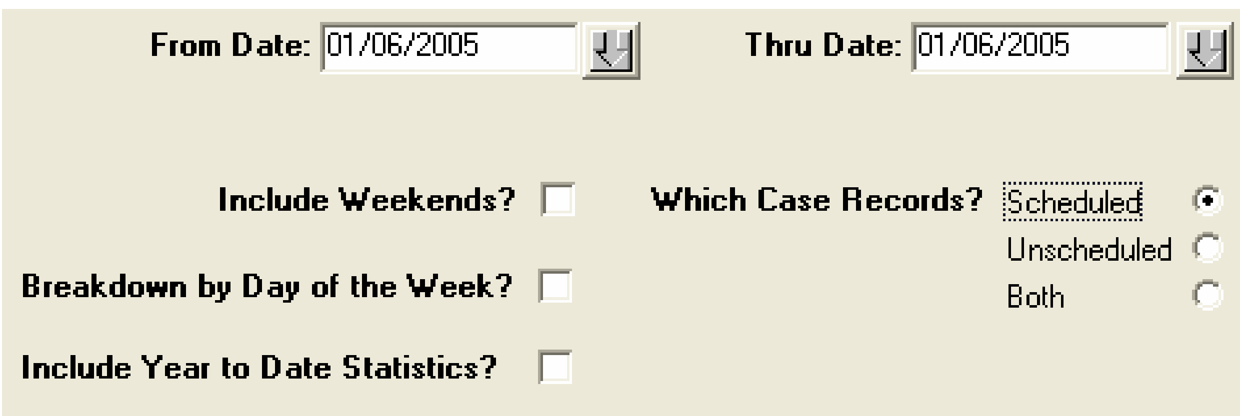
Totals NOT Including Weekends and Holic
ALL CASES - Scheduled or Unschedule
Between 01/06/2005 and 01/06/2005 , for all F

	Period to Date										
Surgeon	**Total Cases**	**Total Time**	**Block Time**	**Block Used**	**%**	**Block Unused**	**%**	**Non-Bl Used**	**%**	**Total Cases**	**Total Time**
Aarons, Nathan	1	3:00	0:00	0:00	0%	0:00	0%	3:00	100%	1	3:00
Adison, Ronald	1	4:00	8:00	4:00	50%	4:00	50%	0:00	0%	1	4:00
Brown, Christopher	1	1:10	0:00	0:00	0%	0:00	0%	1:10	100%	1	1:10
Holt, Kathleen	1	1:20	0:00	0:00	0%	0:00	0%	1:20	100%	1	1:20
Totals	4	9:30	8:00	4:00	50%	4:00	50%	5:30	58%	4	9:30

This report is based on a date range parameter. Dr. Adison performed one case record lasting 4 hours, he was assigned 8 hours of block and all of this completed case was within defined block time.

Note: A room designation is not relevant in this example.

The selected parameters include a **From Date** and **To Date** of 01/06/2005, with only **Scheduled** cases selected.



OR Manager Surgeon Block Time Utilization Report

Totals NOT Including Weekends and Holic
ALL CASES - Scheduled or Unschedule
Between 01/06/2005 and 01/06/2005 , for all F

Surgeon	Period to Date											
	Total Cases	Total Time	Block Time	Block Used	%	Block Unused	%	Non-Bl Used	%	Total Cases	Total Time	I
Aarons, Nathan	1	3:00	0:00	0:00	0%	0:00	0%	3:00	100%	1	3:00	
Adison, Ronald	1	4:00	8:00	4:00	50%	4:00	50%	0:00	0%	1	4:00	
Brown, Christopher	1	1:10	0:00	0:00	0%	0:00	0%	1:10	100%	1	1:10	
Holt, Kathleen	1	1:20	0:00	0:00	0%	0:00	0%	1:20	100%	1	1:20	
Totals	4	9:30	8:00	4:00	50%	4:00	50%	5:30	58%	4	9:30	

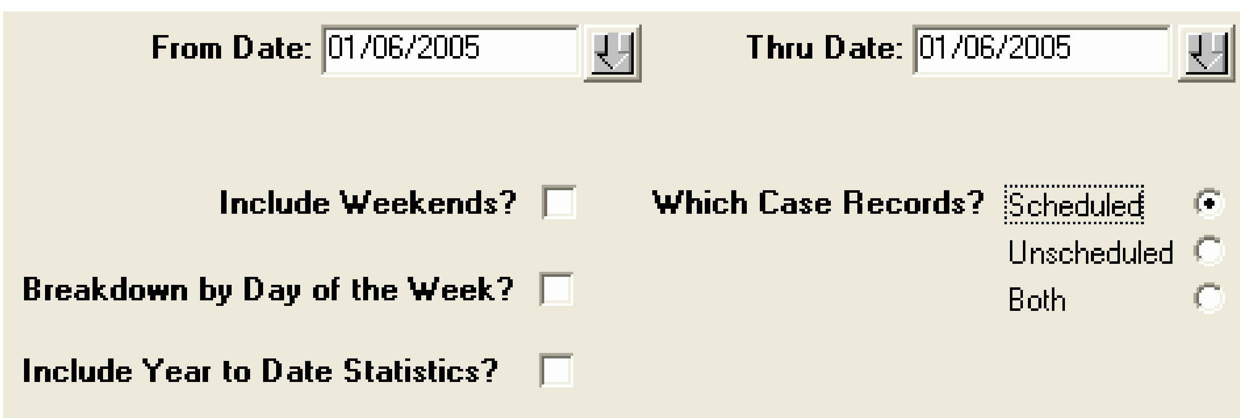
Dr. Adison's single case record still exists as used block time because his booking and case record were on 01/06/2005. As long as the booking and case record are linked together, this is considered a scheduled case.

The following parameters are selected for the next example:

From Date: 01/06/2005

To Date: 01/06/2005

Which Case Records? Scheduled



OR Manager Surgeon Block Time Utilization Report

Totals NOT Including Weekends and Holic
SCHEDULED Cases Only
Between 01/06/2005 and 01/06/2005 , for all F

	Period to Date											
Surgeon	Total Cases	Total Time	Block Time	Block Used	%	Block Unused	%	Non-Bl Used	%	Total Cases	Total Time	I
Aarons, Nathan	1	3:00	0:00	0:00	0%	0:00	0%	3:00	100%	1	3:00	
Adison, Ronald	1	4:00	8:00	4:00	50%	4:00	50%	0:00	0%	1	4:00	
Brown, Christopher	1	1:10	0:00	0:00	0%	0:00	0%	1:10	100%	1	1:10	
Holt, Kathleen	1	1:20	0:00	0:00	0%	0:00	0%	1:20	100%	1	1:20	
Totals	4	9:30	8:00	4:00	50%	4:00	50%	5:30	58%	4	9:30	

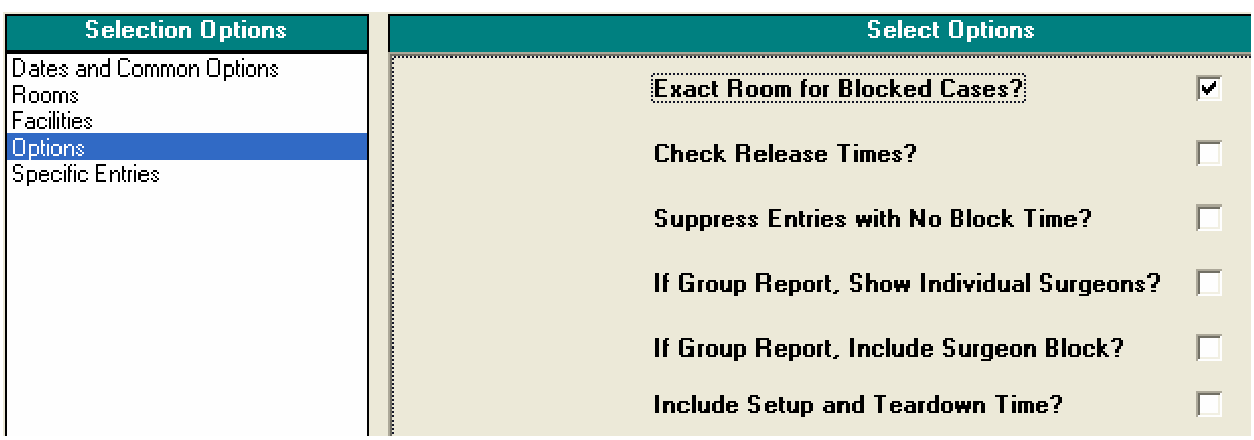
Dr. Adison's one case record still exists as used block time since his booking and case record were on 01/06/2005 and as long as the booking and case record are linked together, this is considered a scheduled case. Note that if the parameter for Unscheduled case records had been selected, nothing would appear on the report printout, as this was the only procedure performed by Dr. Adison, and it was scheduled.

Parameters Selected:

From Date = 01/06/2005, To Date = 01/06/2005

Which Case Records? Both

Exact Room for Blocked Cases? checked



OR Manager Surgeon Block Time Utilization Report

Totals NOT Including Weekends and Holida
ALL CASES - Scheduled or Unscheduled
Between 01/06/2005 and 01/06/2005 , for all Fa
Exact Room = 'Y'

	Period to Date											
Surgeon	**Total Cases**	**Total Time**	**Block Time**	**Block Used**	**%**	**Block Unused**	**%**	**Non-Bl Used**	**%**	**Total Cases**	**Total Time**	**Bl T**
Aarons, Nathan	1	3:00	0:00	0:00	0%	0:00	0%	3:00	100%	1	3:00	
Adison, Ronald	1	4:00	8:00	0:00	0%	8:00	100%	4:00	100%	1	4:00	
Brown, Christopher	1	1:10	0:00	0:00	0%	0:00	0%	1:10	100%	1	1:10	
Holt, Kathleen	1	1:20	0:00	0:00	0%	0:00	0%	1:20	100%	1	1:20	
Totals	4	9:30	8:00	0:00	0%	8:00	100%	9:30	100%	4	9:30	

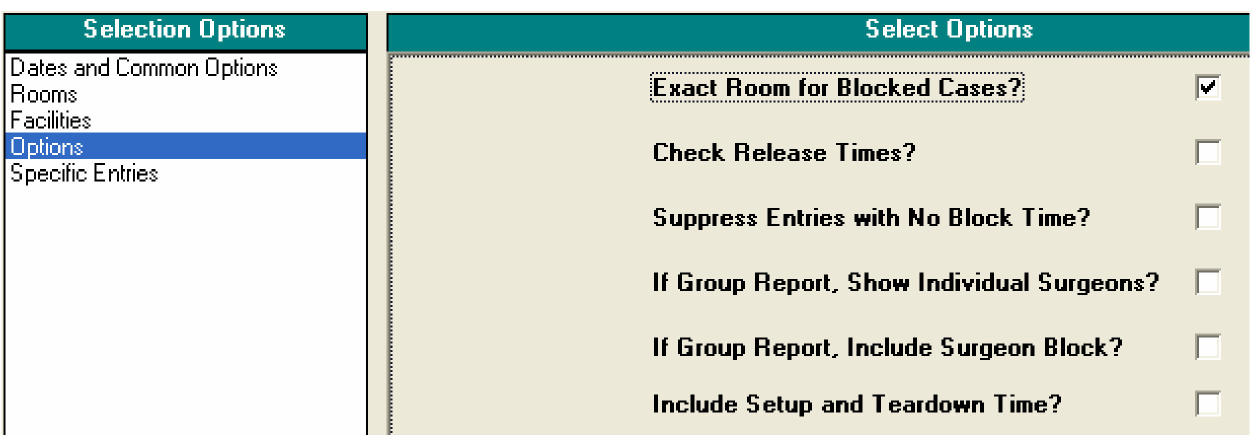
In this example Dr. Adison's booking was in EV_01 but the case record was in EV_05. Using the **Exact Room for Blocked Cases?** selected makes a display with the case time calculated as Non-Block Used time.

Parameters Selected:

From Date = 01/06/2005, To Date = 01/06/2005

Which Case Records? Both

Exact Room for Blocked Cases? checked



OR Manager Surgeon Block Time Utilization Report

Totals NOT Including Weekends and Holida
ALL CASES - Scheduled or Unscheduled
Between 01/06/2005 and 01/06/2005 , for all Fa
Exact Room = 'Y'

	Period to Date											
Surgeon	**Total Cases**	**Total Time**	**Block Time**	**Block Used**	**%**	**Block Unused**	**%**	**Non-Bl Used**	**%**	**Total Cases**	**Total Time**	**Bl T**
Aarons, Nathan	1	3:00	0:00	0:00	0%	0:00	0%	3:00	100%	1	3:00	
Adison, Ronald	1	4:00	8:00	4:00	50%	4:00	50%	0:00	0%	1	4:00	
Brown, Christopher	1	1:10	0:00	0:00	0%	0:00	0%	1:10	100%	1	1:10	
Holt, Kathleen	1	1:20	0:00	0:00	0%	0:00	0%	1:20	100%	1	1:20	
Totals	4	9:30	8:00	4:00	50%	4:00	50%	5:30	58%	4	9:30	

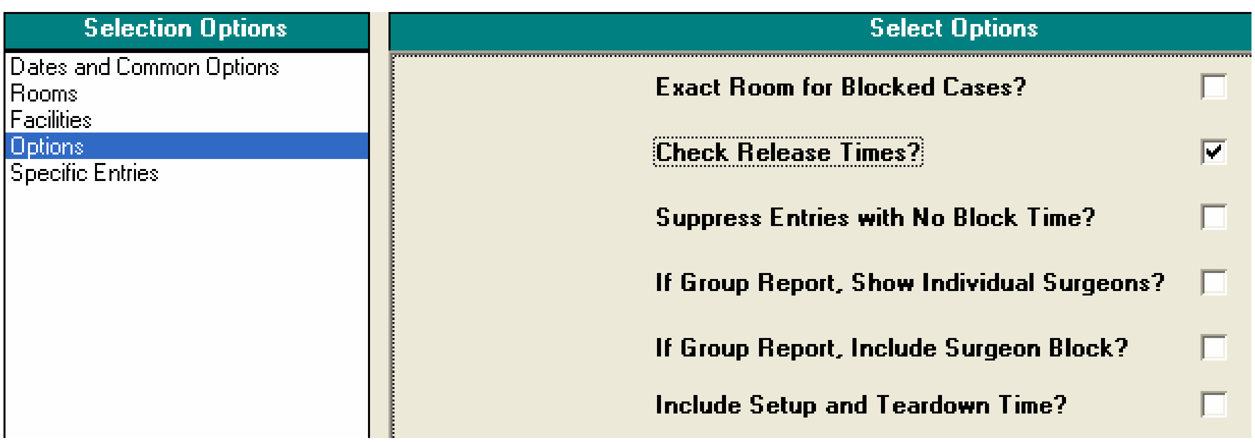
In this example Dr. Adison's booking and case record were both in EV_01. Using the **Exact Room for Blocked Cases?** selected creates a display with the case time calculated as Block Used time.

Parameters Selected:

From Date = 01/06/2005, To Date = 01/06/2005

Which Case Records? Both

Check Release Times? checked



OR Manager Surgeon Block Time Utilization Report

Totals NOT Including Weekends and Holida
ALL CASES - Scheduled or Unscheduled
Between 01/06/2005 and 01/06/2005 , for all Fa
Check Release Times = 'Y'

	Period to Date											
Surgeon	Total Cases	Total Time	Block Time	Block Used	%	Block Unused	%	Non-Bl Used	%	Total Cases	Total Time	Bl T
Aarons, Nathan	1	3:00	0:00	0:00	0%	0:00	0%	3:00	100%	1	3:00	
Adison, Ronald	1	4:00	8:00	0:00	0%	8:00	100%	4:00	100%	1	4:00	
Brown, Christopher	1	1:10	0:00	0:00	0%	0:00	0%	1:10	100%	1	1:10	
Holt, Kathleen	1	1:20	0:00	0:00	0%	0:00	0%	1:20	100%	1	1:20	
Totals	4	9:30	8:00	0:00	0%	8:00	100%	9:30	100%	4	9:30	

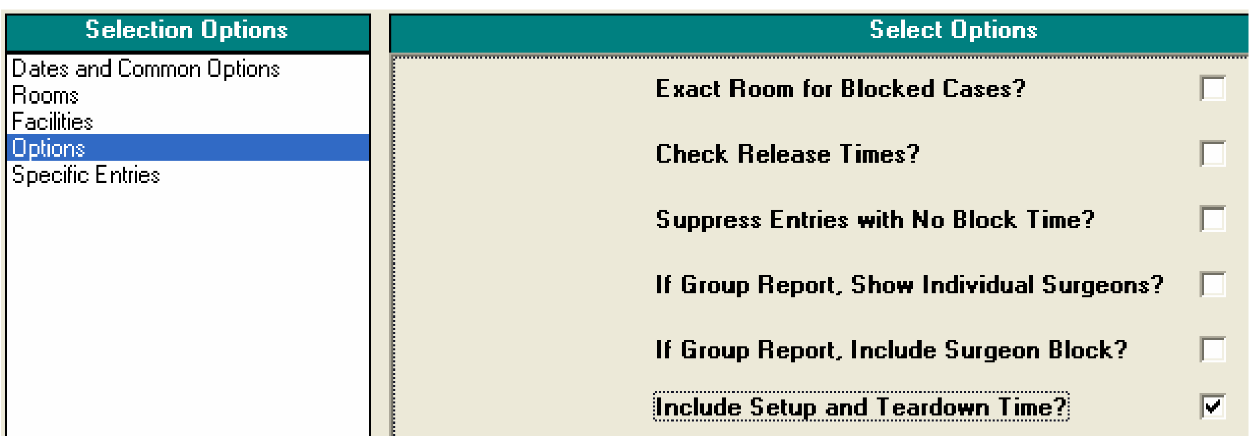
In this example Dr. Adison's booking and case record were both in EV_01. Using the **Check Release Times?** selected make a dispaly with the case time calculated as Non-Block Used time, because this booking was added to the schedule on or after 01/04/2005. If this booking was put on any date prior to 01/04/2005, the report would calculate the case record time as Block Used.

Parameters Selected:

From Date = 01/06/2005, To Date = 01/06/2005

Which Case Records? Both

Include Setup and Teardown Time? checked

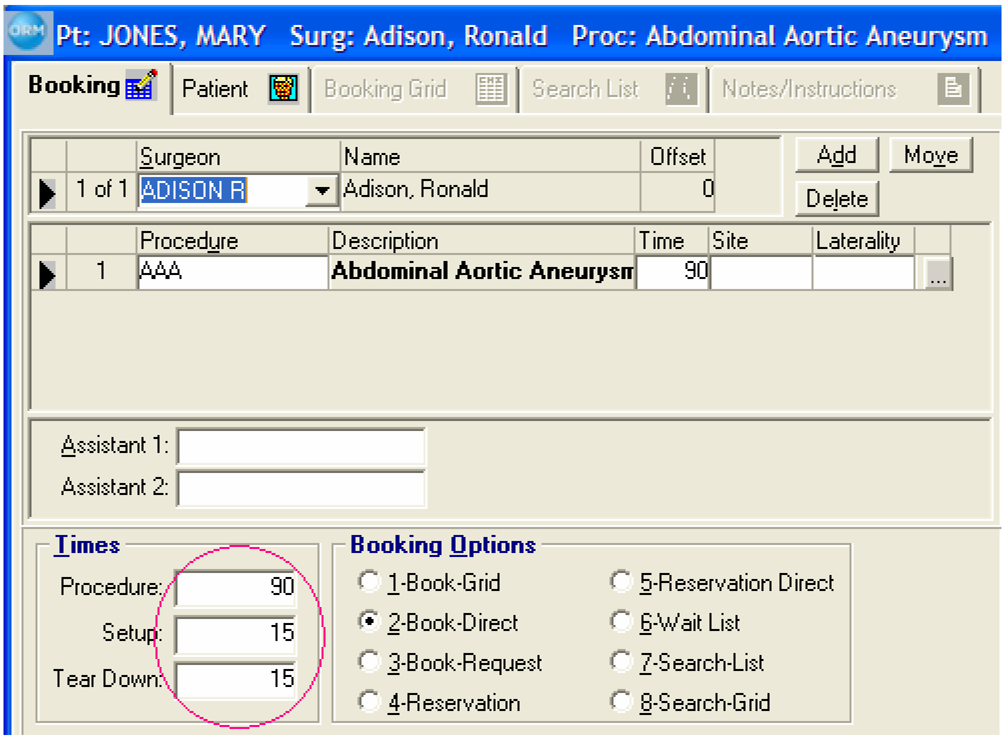


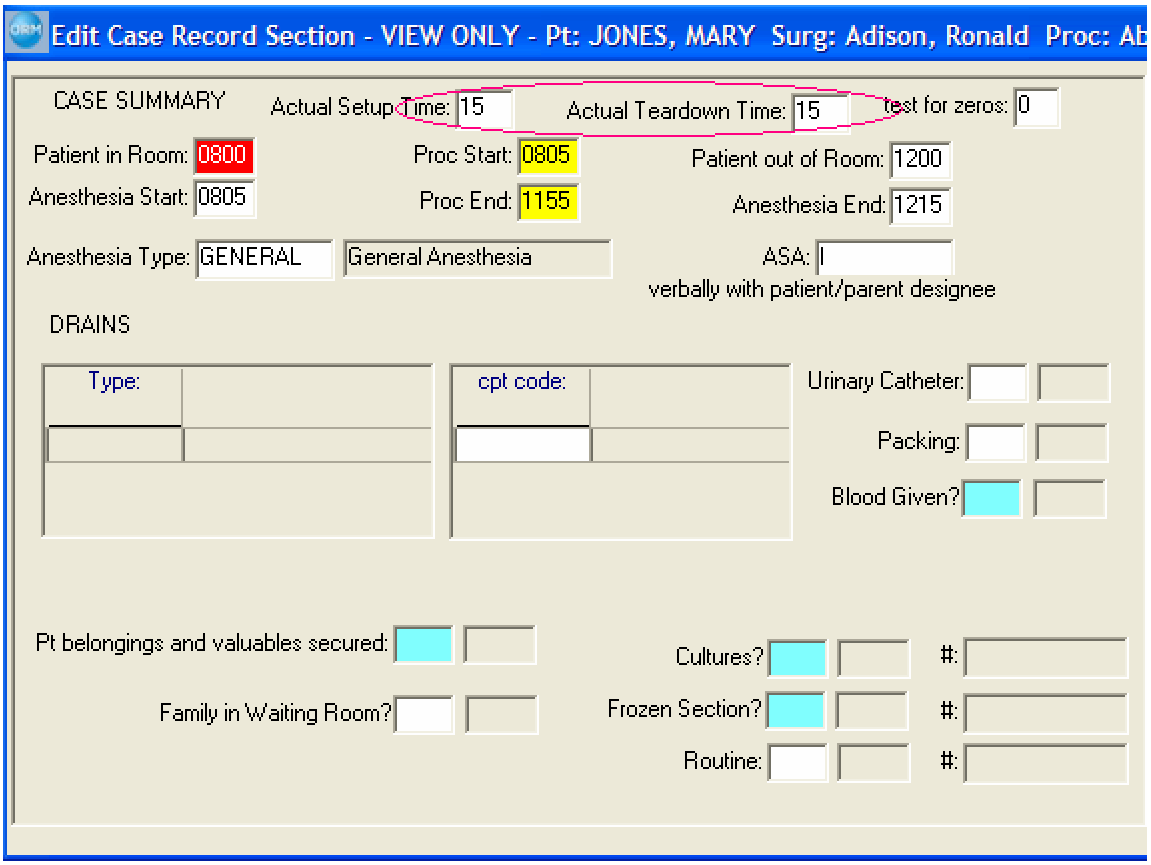
OR Manager Surgeon Block Time Utilization Report

Totals NOT Including Weekends and Holida
ALL CASES - Scheduled or Unscheduled
Between 01/06/2005 and 01/06/2005 , for all Fa

	Period to Date											
Surgeon	**Total Cases**	**Total Time**	**Block Time**	**Block Used**	**%**	**Block Unused**	**%**	**Non-Bl Used**	**%**	**Total Cases**	**Total Time**	**Bl T**
Aarons, Nathan	1	3:00	0:00	0:00	0%	0:00	0%	3:00	100%	1	3:00	
Adison, Ronald	1	4:30	8:00	4:30	56%	3:30	44%	0:00	0%	1	4:30	
Brown, Christopher	1	1:10	0:00	0:00	0%	0:00	0%	1:10	100%	1	1:10	
Holt, Kathleen	1	1:20	0:00	0:00	0%	0:00	0%	1:20	100%	1	1:20	
Totals	4	10:00	8:00	4:30	56%	3:30	44%	5:30	55%	4	10:00	

In this example Dr. Adison's case record had set up time of 15 minutes and teardown time of 15 minutes. This data was brought over from the booking and not altered on the case record. Using the **Include Setup and Teardown Times?** selected will add the additional 15 minutes on either end of the Patient Inroom and Out of room times into the whole calculation and include in the case record time as Block Used.


Pt: JONES, MARY Surg: Adison, Ronald Proc: Abdominal Aortic Aneurysm
Booking
Patient
Booking Grid
Search List
Notes/Instructions
Surgeon
Name
Offset
1 of 1
ADISON R
Adison, Ronald
0
Add
Move
Delete
Procedure
Description
Time
Site
Laterality
1
AAA
Abdominal Aortic Aneurysm
90
Assistant 1:
Assistant 2:
Times
Procedure:
90
Setup:
15
Tear Down:
15
Booking Options
1-Book-Grid
2-Book-Direct
3-Book-Request
4-Reservation
5-Reservation Direct
6-Wait List
7-Search-List
8-Search-Grid

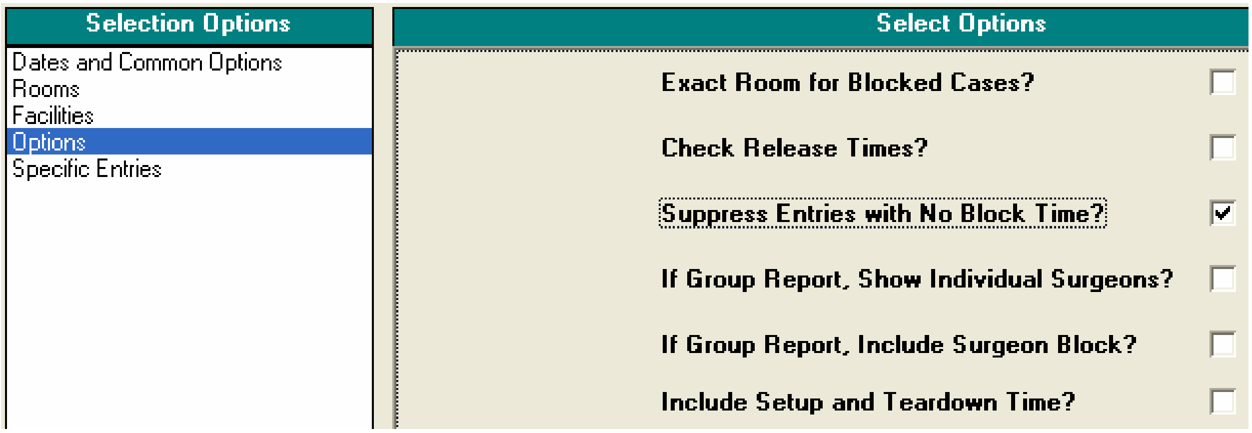


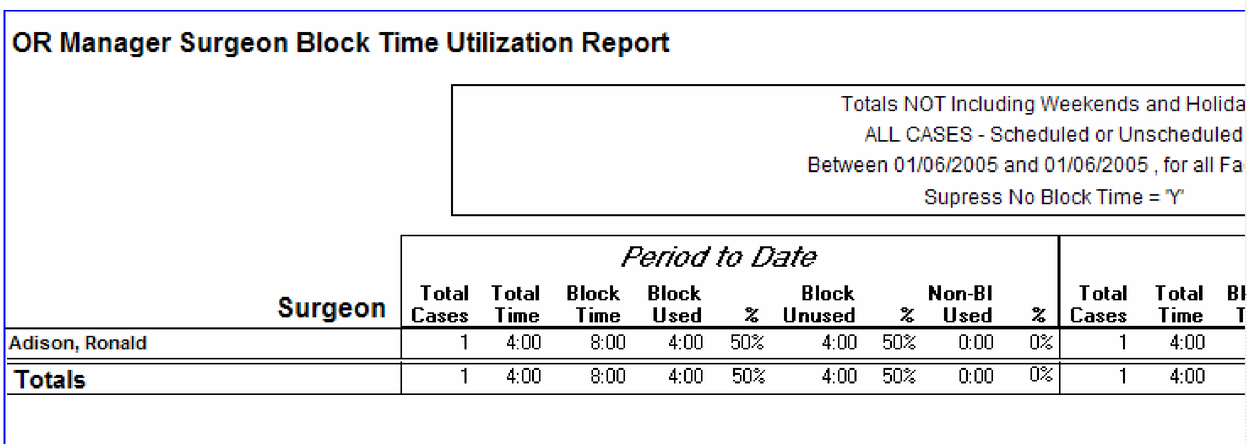
Parameters Selected:

From Date = 01/06/2005, To Date = 01/06/2005

Which Case Records? Both

Suppress Entries with No Block Time? checked





OR Manager Surgeon Block Time Utilization Report

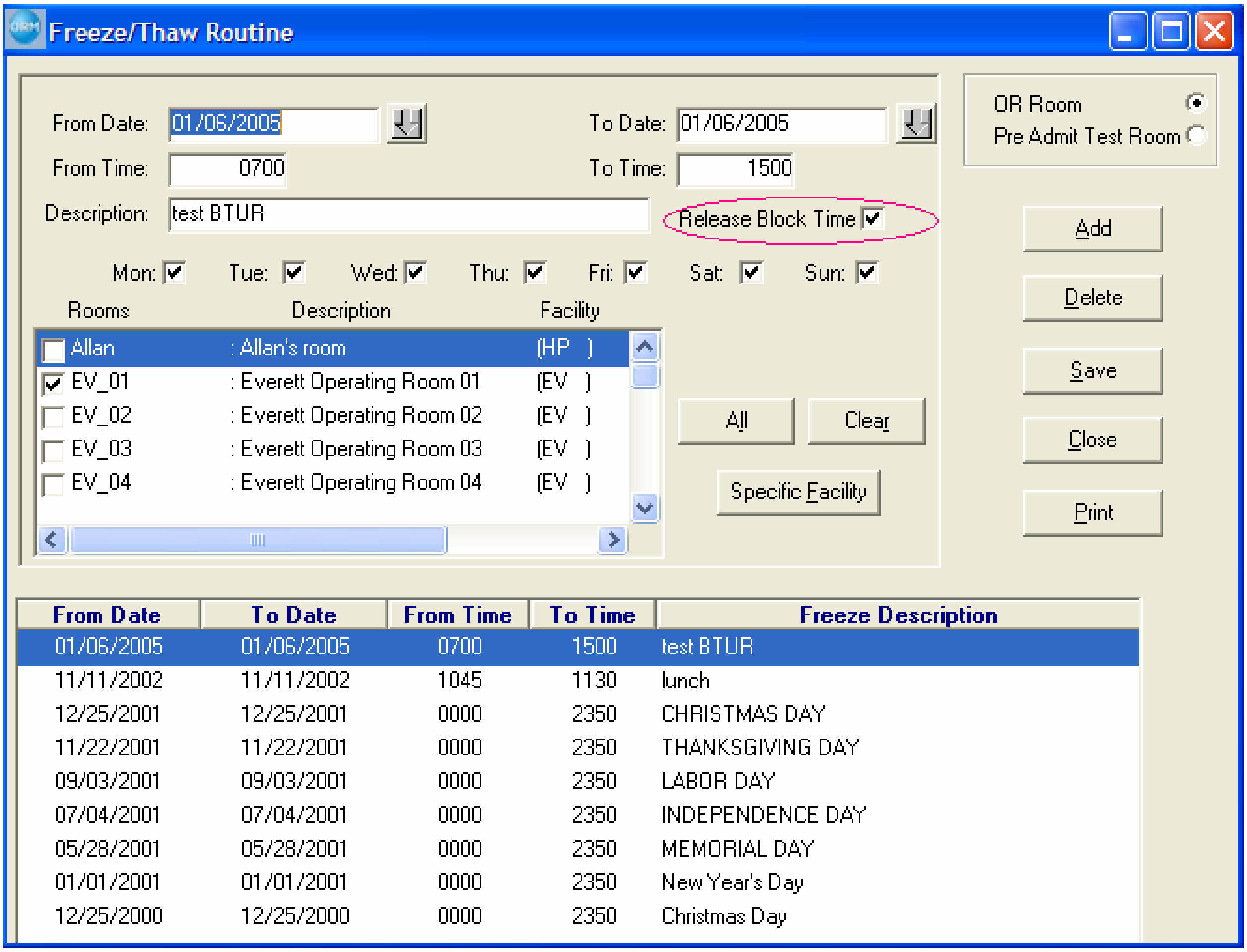
Totals NOT Including Weekends and Holida
ALL CASES - Scheduled or Unscheduled
Between 01/06/2005 and 01/06/2005 , for all Fa
Supress No Block Time = 'Y'

	Period to Date											
Surgeon	Total Cases	Total Time	Block Time	Block Used	%	Block Unused	%	Non-Bl Used	%	Total Cases	Total Time	Bl T
Adison, Ronald	1	4:00	8:00	4:00	50%	4:00	50%	0:00	0%	1	4:00	
Totals	1	4:00	8:00	4:00	50%	4:00	50%	0:00	0%	1	4:00	

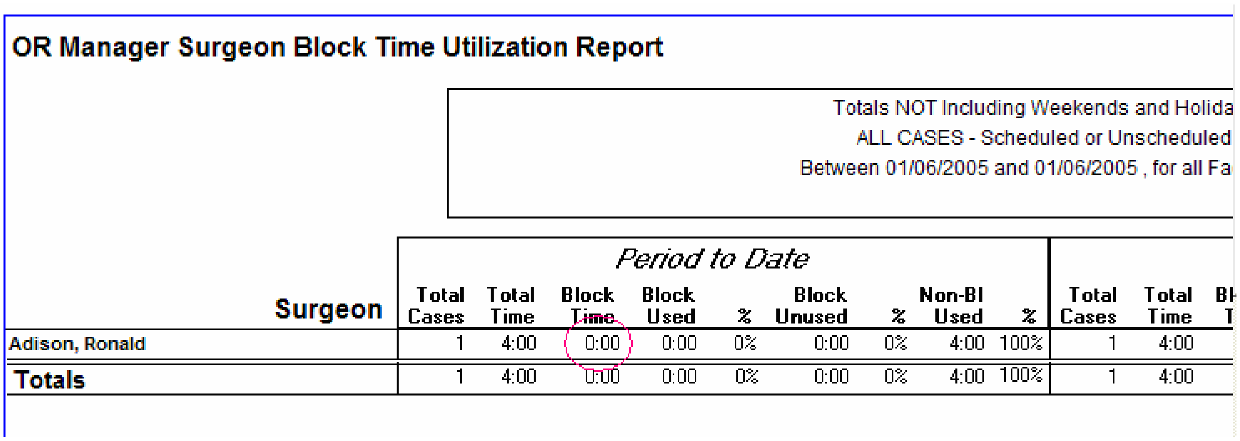
In this example Dr. Adison was the only surgeon with block time assigned on 01/06/2005. You'll notice all other surgeons from the previous example screens above are missing from this report.

Freeze/Thaw Effects on Block Time Utilization Reports

The Freeze/Thaw screen is typically used for short-term room closures such as maintenance or lack of staff availability. This may be for several hours or a couple of days. Within this screen there is an option for releasing block time.



The checkbox in this screen does not actually create or remove any block time in the room dictionary. Checking the box causes the system to exclude the defined time in this routine from any block utilization calculations. If you do not check this box, and there is block time assigned to a block type in the room with the freeze, the system includes this time even though the time could not be utilized. This in essence would "count against" the surgeon or group.

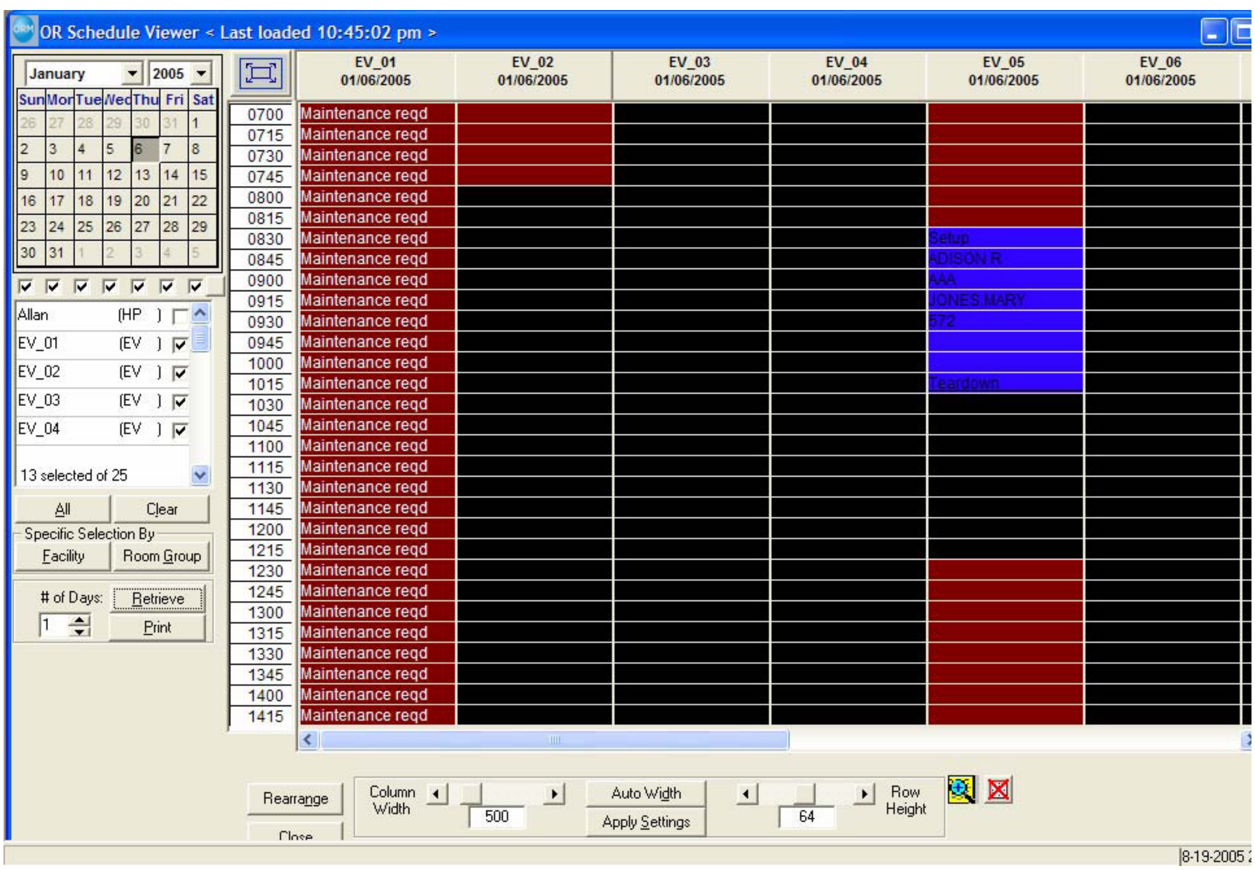


OR Manager Surgeon Block Time Utilization Report

Totals NOT Including Weekends and Holida
ALL CASES - Scheduled or Unscheduled
Between 01/06/2005 and 01/06/2005 , for all Fa

Surgeon	Period to Date												
	Total Cases	Total Time	Block Time	Block Used	%	Block Unused	%	Non-Bl Used	%	Total Cases	Total Time	Bl T
Adison, Ronald	1	4:00	0:00	0:00	0%	0:00	0%	4:00	100%	1	4:00	
Totals	1	4:00	0:00	0:00	0%	0:00	0%	4:00	100%	1	4:00	

In the following report example, the freeze defined shows Release Block selected, and there is no block time column value on the report.



See the preceding Schedule viewer screen for the Freeze set up for EV_01 where maintenance was required. This is where Dr. Adison's block originally was placed, and now his case was moved to EV_05. The Freeze/Thaw routine used to freeze EV_01 did not have Release Block selected.

OR Manager Surgeon Block Time Utilization Report

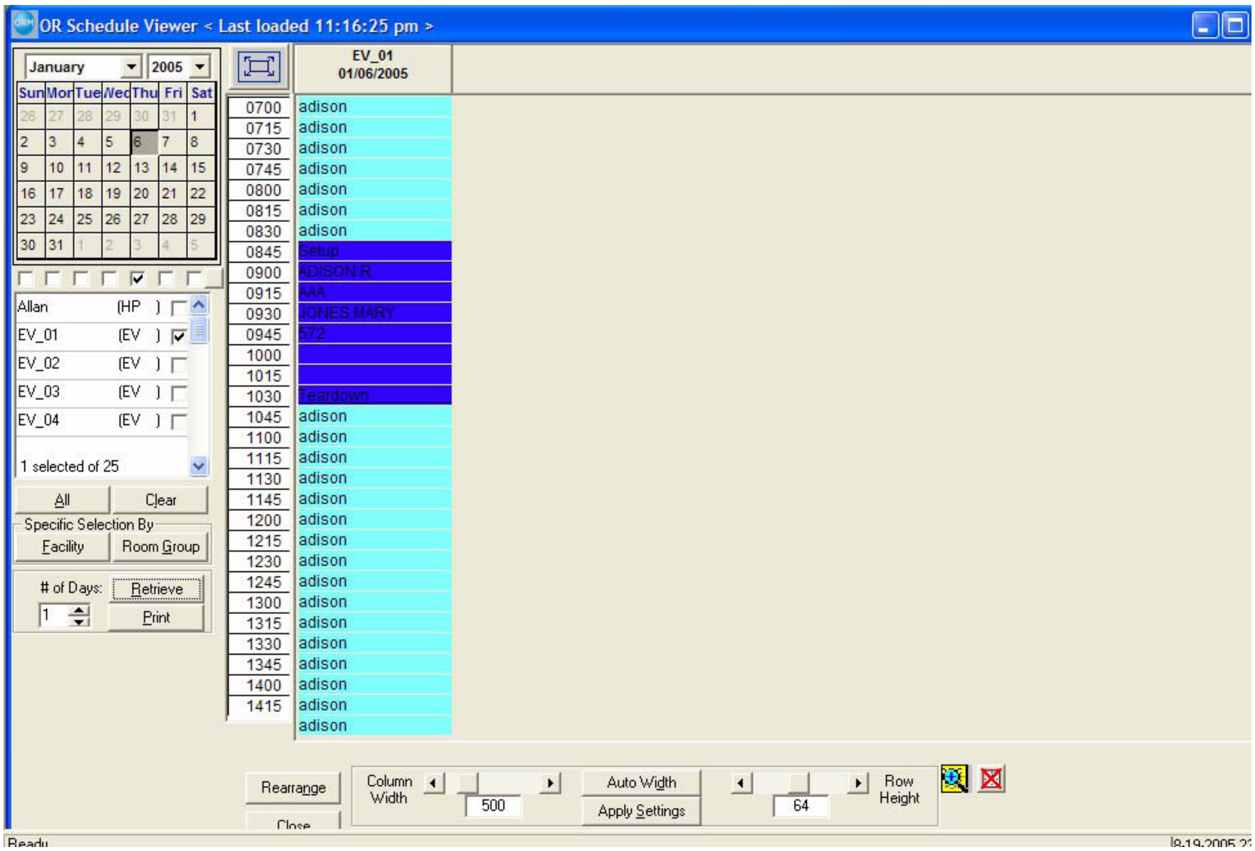
Totals NOT Including Weekends and Holida
ALL CASES - Scheduled or Unscheduled
Between 01/06/2005 and 01/06/2005 , for all Fa
Exact Room = 'Y'

	Period to Date											
Surgeon	Total Cases	Total Time	Block Time	Block Used	%	Block Unused	%	Non-Bl Used	%	Total Cases	Total Time	Bl T
Adison, Ronald	1	4:00	8:00	0:00	0%	8:00	100%	4:00	100%	1	4:00	
Totals	1	4:00	8:00	0:00	0%	8:00	100%	4:00	100%	1	4:00	

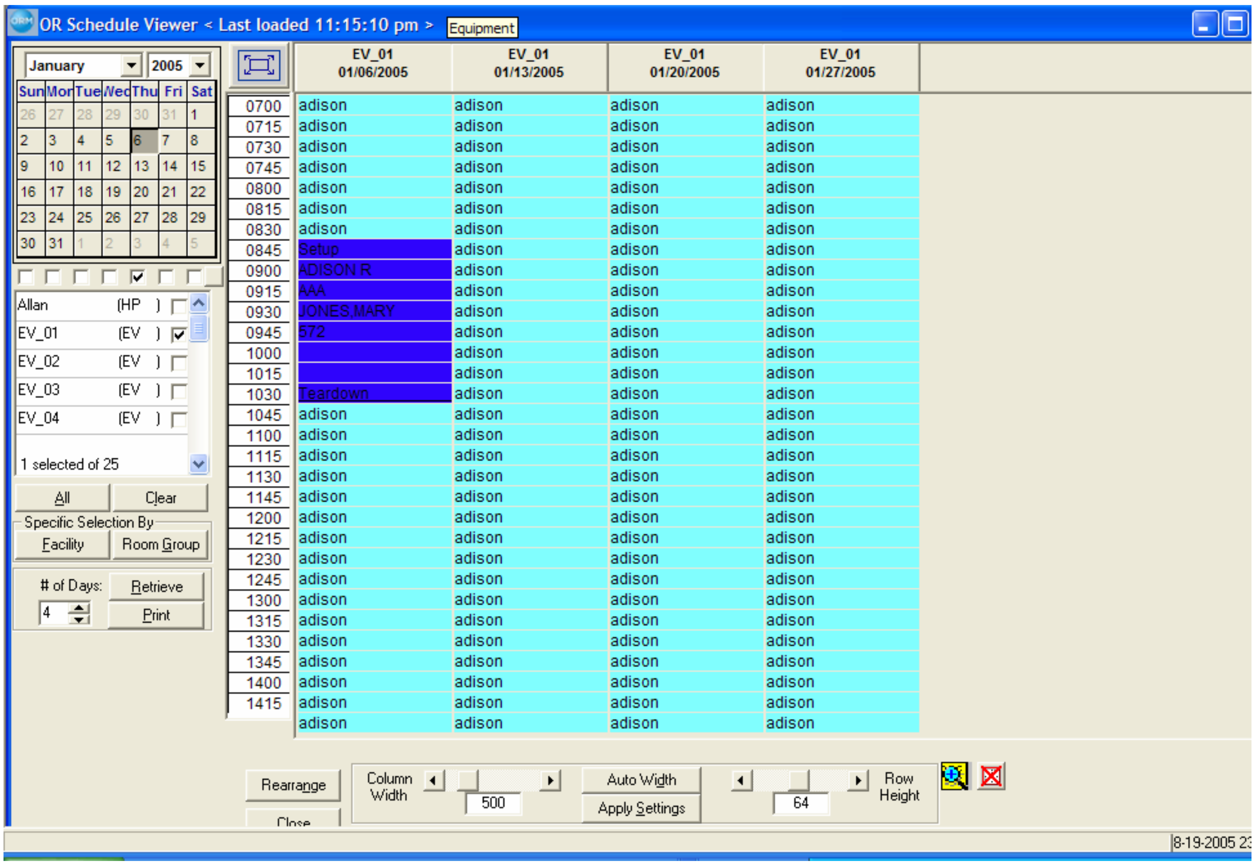
In the preceding report example, the freeze defined on the last page did not have the Release Block selected. This again makes it appear that the block existed on the Block Time Utilization report, but you would not be able to book a case for Dr. Adison. This would mean that although a block was on the grid, but frozen, it would not be available and would count against Dr. Adison. Also, notice that for this example, this Block Time Utilization report parameter requested the Exact Room option. This would mean that the Block Used would be zero.

The Effect of Releasing Blocks on Block Time Utilization Reports

This section describes how releasing blocks affects the calculations of the BTU report.



This screen displays a block for Dr. Adison on 01/06/2005 with the same booking utilized as in many of the preceding examples. This block has been defined as a 48-hour release in the block parameters in the room schedule for room EV_01. What this means is the system automatically turns this block to open available time for any surgeon/group, etc. This also means this time is calculated as assigned block to Dr. Adison on the Block Time Utilization report, whether or not a booking or case record was completed on this date.



The preceding graphic displays all of Dr. Adison’s blocks for January 2005, as shown in all dates in column headings.

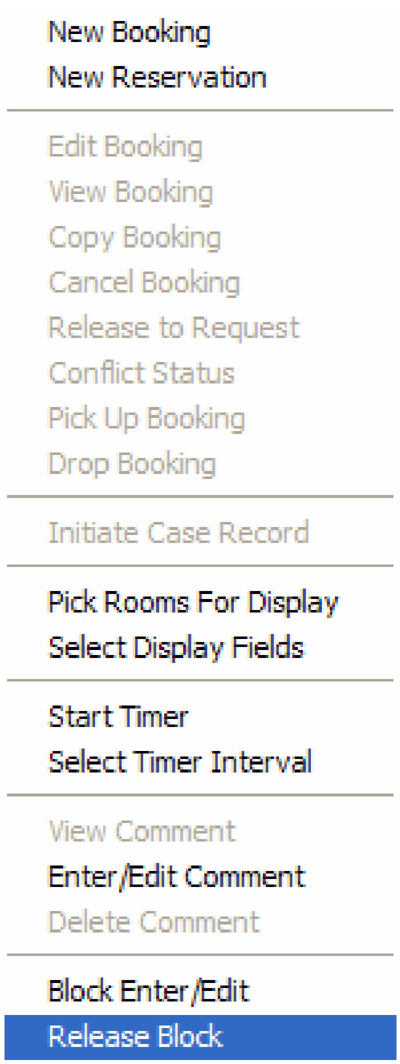
OR Manager Surgeon Block Time Utilization Report

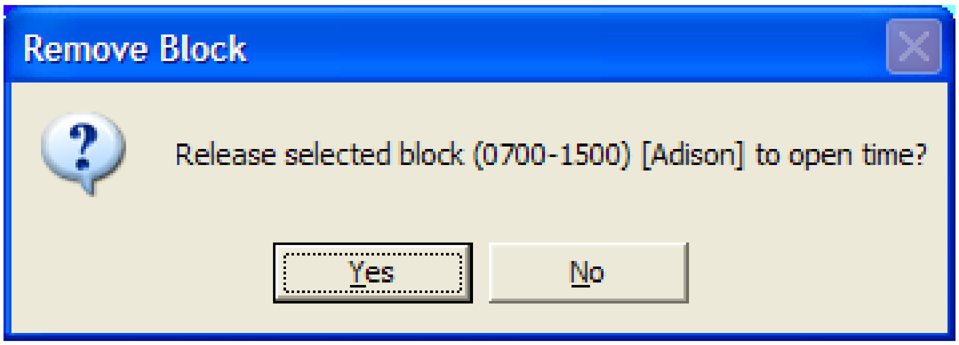
Totals NOT Including Weekends and Holida
ALL CASES - Scheduled or Unscheduled
Between 01/06/2005 and 01/27/2005 , for all Fa
Supress No Block Time = 'Y'

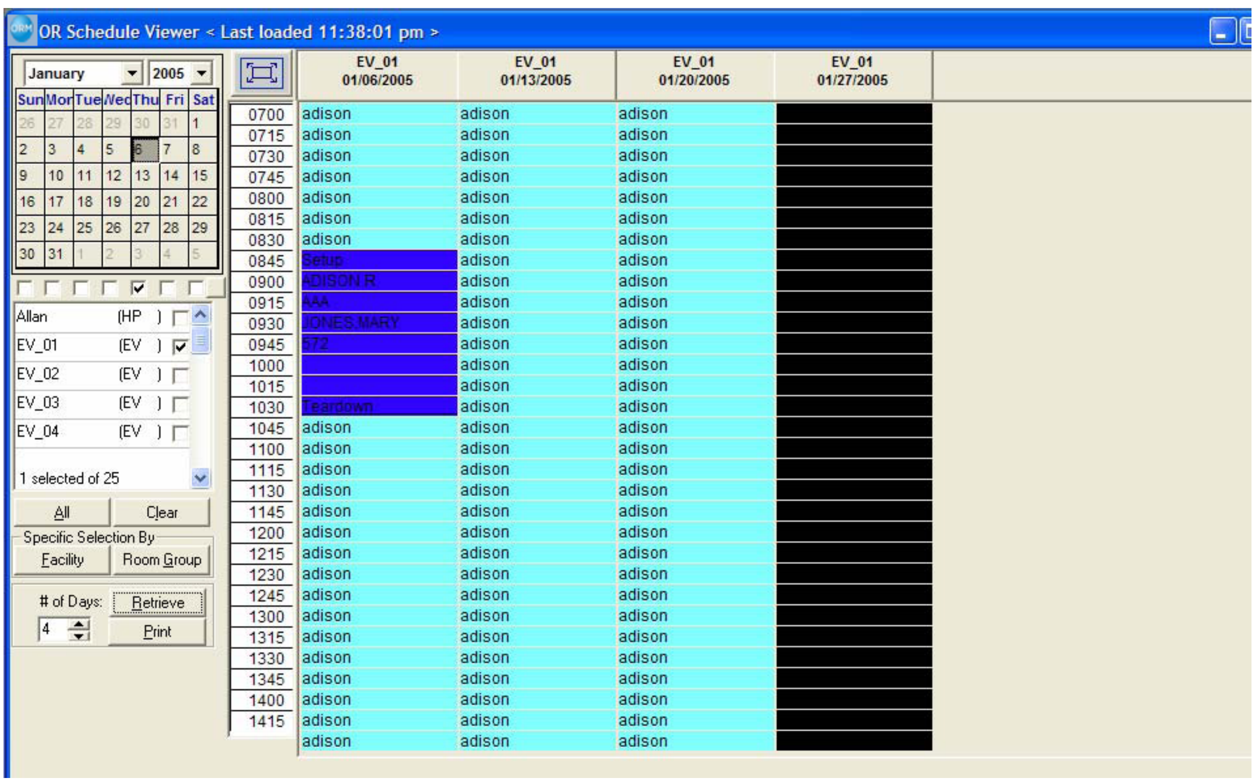
Surgeon	Period to Date											
	Total Cases	Total Time	Block Time	Block Used	%	Block Unused	%	Non-Bl Used	%	Total Cases	Total Time	Bl T
Adison, Ronald	2	6:14	32:00	4:00	13%	28:00	88%	2:14	36%	2	6:14	3
Totals	2	6:14	32:00	4:00	13%	28:00	88%	2:14	36%	2	6:14	3

The preceding example shows all 4 Thursdays in January 2005 for Dr. Adison’s block as 32:00 hours.

If Dr. Adison calls to request to voluntarily release his block on 01/27/2005 because he knows he will be out of town, you can open the schedule viewer routine and right-click on the block to display the following menu and message prompt. Use the option **Release Block** to open whole block to open/available time for any surgeon or group.







The following example shows the 01/27/2005 block released.

OR Manager Surgeon Block Time Utilization Report

Totals NOT Including Weekends and Holida
ALL CASES - Scheduled or Unscheduled
Between 01/06/2005 and 01/27/2005 , for all Fa
Supress No Block Time = 'Y'

Surgeon	*Period to Date*											
	Total Cases	Total Time	Block Time	Block Used	%	Block Unused	%	Non-Bl Used	%	Total Cases	Total Time	Bl T
Adison, Ronald	2	6:14	24:00	4:00	17%	20:00	83%	2:14	36%	2	6:14	2
Totals	2	6:14	24:00	4:00	17%	20:00	83%	2:14	36%	2	6:14	2

The preceding Block Time Utilization report shows the last Thursday in January 2005 released voluntarily, which the system considers as if it never existed, and which does not count against Dr. Adison as Unused Block time. Now his denominator for block time is only 24:00 hours.

Many variations of options selected for the Block Time Utilization report can have differing results on the output. You may have to practice setting up the report or run it with specific options first to retrieve one set of results, and then reselect other options to retrieve secondary results to ensure you determine the best utilization of block time in your OR.

Surgeon Utilization Report

Menu:Reports > Surgeon Utilization

Surgeon Utilization Reports allow you to see you how efficiently your surgeons' time is being used.

To compute actual surgeon utilization times, OR Manager uses the following:

- The parameters set in the Case Record Field Mapping dictionary.
- Times entered in completed case records.

Generate a Surgeon Utilization Report

1. Select **Reports > Surgeon Utilization**.

   The Surgeon Utilization Report Prompt screen opens.

2. Select the data you want to appear on your report.

   The Options menu item under Selection Options contains the following choices:

   - **Averages or Totals**: Choose whether you want your statistics totaled out, or averaged, for both the Period to Date and the Year to Date.

- **Surgeon or Group**: Choose whether you want your report broken down by individual Surgeon or by Surgeon Block Time Group.
- **Include Freezes For Open Room Time**: Select if you want to include the times that rooms were frozen as part of the open (available) room time.

3. After selecting what data you want in your report, click **Retrieve**.
4. Your Surgeon Utilization Report opens.

Report Stats

Below are explanations of the Surgeon Utilization Report Statistics. *Period to Date* stats are from the specified date range, and *Year to Date* stats are from January 1 through the most recent date specified in the Period to Date. (See *Year to Date* unless otherwise specified.)

- **Total Cases**: The number of cases performed by the surgeons.
- % of Cases: The percentage of the total cases (of all surgeons) performed by the surgeon.
- **Total Time**: Total hours/minutes of the surgeon's cases.
- **% of Total**: The surgeon's percentage of time spent on cases compared to the total time for all surgeons (Total Time/Total for this Surgeon).
- **% Avail Time Used**: Percentage of the total available time (total time that all rooms were open) that this surgeon spent performing cases.

Note: Totals shown at the bottom of reports are for all surgeons, including those not in this report.

Room Utilization Reports

Menu:Reports > Room Utilization

OR Manager's Room Utilization Reports allow you to see how efficiently you are using your operating rooms.

To compute actual room utilization time, OR Manager uses the following:

- Room dictionary schedules to calculate available or room closed times.
- Parameters set in the Case Record Field Mapping dictionary.
- Times entered in completed case records.

Generate a Room Utilization Report

1. Select **Reports > Room Utilization**.

The Room Utilization Report Prompt screen opens.

2. Select the data you want to appear on your report (See *Generate a Utilization Report* on page 262.)

   The Options menu item under **Selection Options** contains the following choices:

   - **From/Thru Times**: Enter a time range to limit the report to cases performed within certain times. If a case is performed partially within the time range, the report includes only statistics from the portion within the specified range.
   - **Show Percents Based on Time Range**: Select to show percents based on the selected time range rather than on total available time.
   - **Rooms**: Select **Open** to include only rooms that were defined as Open in the Rooms dictionary when the cases were performed. Select **Closed** to include only cases performed in rooms declared Closed in the Rooms dictionary. Select **Both** to include Open *and* Closed Rooms.

   Note: Rooms frozen in the Freeze/Thaw dictionary are considered closed.

   - **Include Inactive Rooms**: Select to include rooms currently defined as Inactive in the Rooms dictionary.
   - **Show Averages or Totals**: Select **Averages** to see the averages for the Year to Date. Select **Totals** to see totaled out statistics.

3. After selecting the data you want in your report, click **Retrieve**.

   Your Room Utilization Report opens.

Report Stats

Below are explanations of the Room Utilization Report Statistics. *Period to Date* stats are from the specified date range, and *Year to Date* stats are from January 1 through the most recent date specified in the Period to Date. (See *Year to Date* on page 267 unless otherwise specified.)

- **Total Cases**: The number of cases performed in this room.
- **Total Time**: Total number of hours and minutes it took to perform this room's cases. The time is based on whatever From and Thru fields have been selected for Room Utilization on the Case Record Field Mapping screen.
- **Available Time**: Hours and minutes that the room is defined as Open in the Rooms dictionary.
- **% Available Time Used**: Percentage of the room's available time in which cases were actually performed (Total Time/Available Time).
- **% of 24 HR Used**: Percentage of time cases were actually performed in the room, assuming the room was available 24 hours a day.

Surgeon Average Case Length

Menu:Reports > Surgeon Average Case Length

The Surgeon Average Case Length Report allows you to see the average time it takes surgeons to complete their cases. This report ignores complex cases. It deals only with cases that have one surgeon and one procedure.

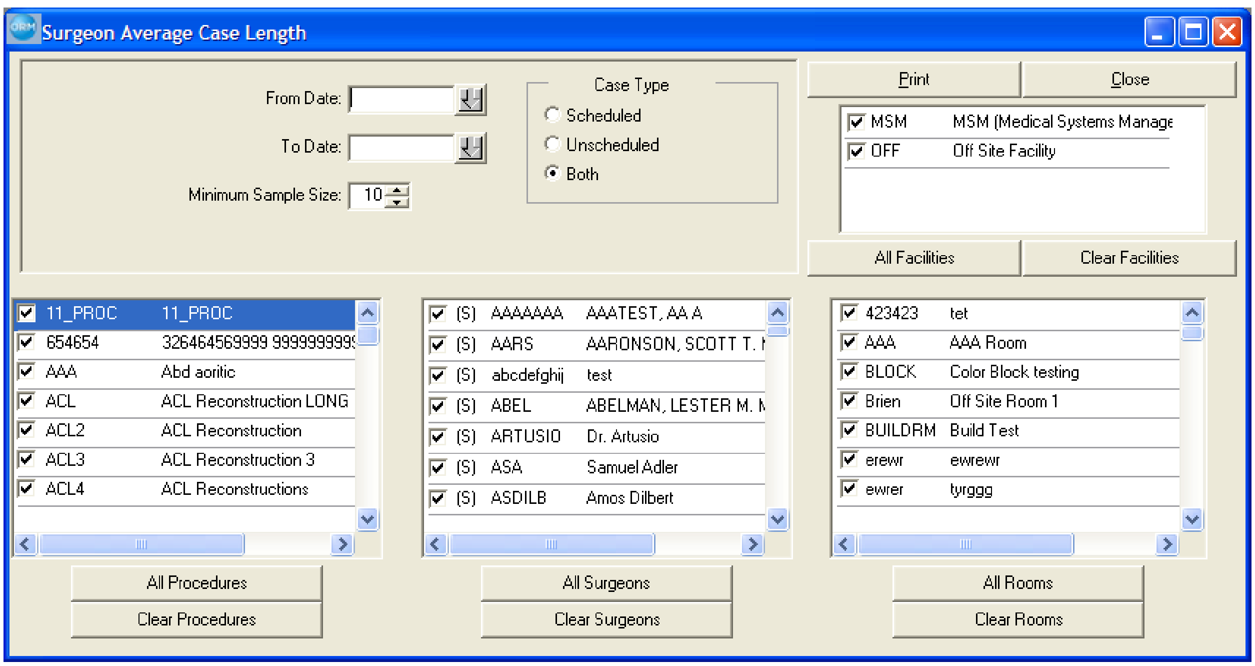
To calculate these times, OR Manager uses the following:

- Parameters set in the Case Records Field Mapping dictionary.
- Times entered into completed case records.

Generate a Surgeon Average Case Length Report

1. Select **Reports > Surgeon Average Case Length**.

   The Surgeon Average Case Length screen appears.



2. Select the Case Type(s) you want to appear on your report.
   - **Scheduled Case Type**: Pulls from case records that are linked to specific bookings.
   - **Unscheduled Case Type**: Pulls from case records that are not linked to specific bookings.

3. Enter or select a **Minimum Sample Size**. This is the minimum number of cases that must fit the criteria before an average case length is generated for them.
4. Specify the **Procedures**, **Surgeons**, and **Rooms** you want to appear on your report. The default is all.
5. Click **Print**.

   Your Average Case Length Report appears.

Report Statistics

The following statistics appear on your Surgeon Average Case Length Report:

- **Cases**: The number of cases performed.
- **Mean**: The average (mean) time it took to perform the cases.
- ***SD.***: Standard Deviation (in minutes), tells you the degree to which each value on a list varies from the mean of all the values on the list—the smaller the standard deviation, the less each value varies from the mean.
- **MN + SD**: Mean plus Standard Deviation.

Preference Card Usage Analysis

Menu:Reports > Preference Card Usage Analysis

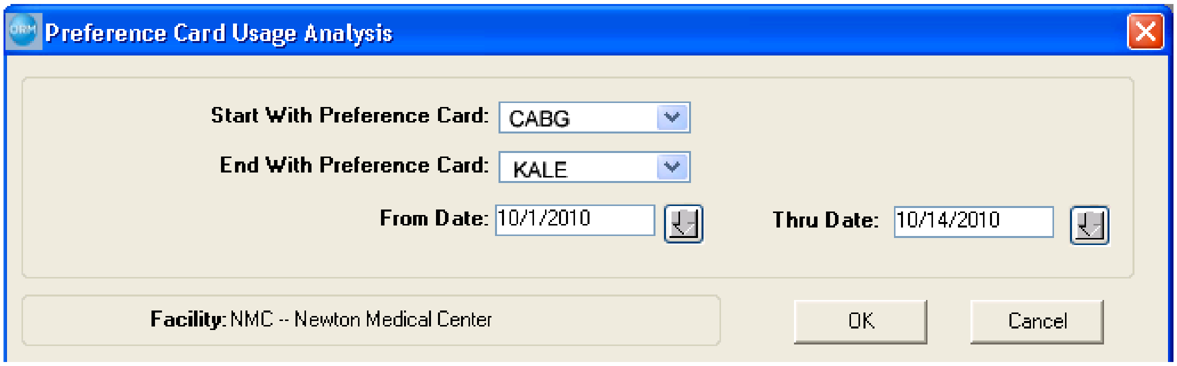
The Preference Card Usage Analysis Report analyzes the stock items on a range of preference cards that have been used over a period of time to tell you how many of each supply item you are actually using compared to the number specified on your preference cards. You can then use the results screen to adjust the quantities of items specified on the preference cards.

Run a Preference Card Analysis

1. From the Reports menu, select **Reports > Preference Card Usage Analysis**.

   The Select OR Facility screen appears.
2. Select the facility whose preference cards you want to analyze. If pick groups exist in the facility, you can select a pick group. Click **Select**.

   The Preference Card Usage Analysis screen opens:



3. Select the range of preference cards you want to analyze.
4. Select the range of dates you want to analyze.

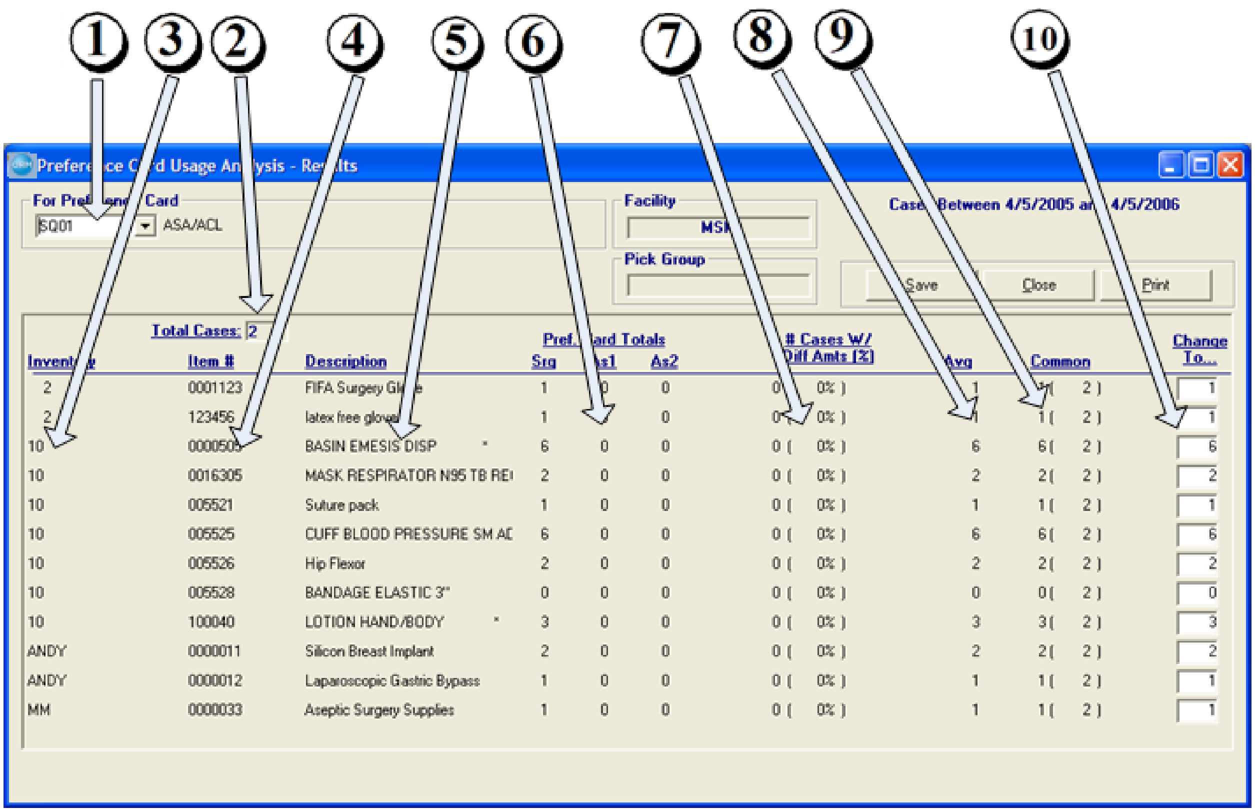
> **Note:** You can select all preference cards for all date ranges by leaving all of the fields blank. Doing this can take a long time to return results because of the potential number of items involved.

5. Click **OK**.

   The Preference Card Usage Analysis - Results screen appears with the list of supply items from the preference cards used during the dates you specified.
6. Change the quantities in the **Change to...** column as desired.
7. Select the boxes in the **Chg OK?** column as desired.
8. Click **Save** to save your changes.

Results Screen

The Preference Card Usage Analysis - Results screen shows you an analysis of each preference card you selected, one at a time.



Preference Card Usage Analysis

No.	Column/Field	Description
1	For Preference Card	To view a different card, select another card in the **For Preference Card** box.
2	Total Cases	The number of cases this card was used for during the date range you specified. • The rows in the box at the bottom of the screen are for each item on the preference card. • The columns in the box at the bottom of the screen contains the number and analyses for each item. This table describes the columns:
3	Inventory	Inventory that the stock items came from.

No.	Column/Field	Description
4	Item #	Item's mnemonic from the Stock dictionary.
5	Description	Item description from the Stock dictionary.
6	Pref Card Totals Srg As1 As2	These columns show the quantity of each item on the preference card for the surgeon, the first assistant, and the second Assistant.
7	# of Cases W/ Diff Amts (%)	The number of procedures whose supply usage differs from the number on the card. The figure in ( ) is the percentage of total procedures in which the number differed.
8	Avg	The number of items actually used divided by the number of cases.
9	Common	The most common amount. The number of cases in which the most common amount appears is in parentheses.
10	Change to...	Edit the number in this box to change the quantity shown on the preference card.

Preference Card Inactive Stock Reports

Menu:Reports > Preference Card Inactive Stock

OR Manager's Preference Card Inactive Stock Report lets you see what supplies in Materials Management are inactive. This is a valuable tool for keeping your preference cards up-to-date. After you see what stock is inactive, you can quickly update the preference cards using the Manage Preference Cards screen.

See the *OR Manager Configuration Guide*: Manage Preference Cards.

Generate a Preference Card Inactive Stock Report

1. Select **Reports > Preference Card Inactive Stock**.

   The screen for specifying a Preference Card Inactive Stock Listing appears in its default form, which allows you to search preference cards.

2. Choose a method to **Select By.**
   - **Preference Card**: Specifies a report of the inactive stock on each preference card in the range that you define.
   - **Inactive Stock**: This option searches inventories for inactive stock. The screen has the form shown in the next graphic. Items in the report appear by stock number, and **Show Summary** determines how they are grouped. Selecting **Show Summary** results in a report that shows one item per line, with each line including the total number of cards. When **Show Summary** is clear, the report has a section for each item, and a line for each card appears in the section.
3. Select a range of preference cards, or select an inventory and range of stock in it that you want to report on.
4. Click **OK**.

   Your report appears listing the inactive stock appearing on your preference cards. The following graphic shows inactive stock in a summary format.

OR Turnaround Statistics

Menu:Reports > OR Turnaround Statistics

The OR Turnaround Statistics Report allows you to see average turnaround times between cases. Turnaround time is defined as the elapsed time from the end of a case (Case End Time) until the start of the next case (the Case Start Time) in the same operating room. Case start and end time values are defined in the Room Utilization: Start Time and End Time fields in the Case Record Field Mappings dictionary.

Generate an OR Turnaround Statistics Report

1. Select **Reports > Turnaround Statistics**.

   The OR Turnaround screen opens.
2. Select date ranges, time ranges, and days of the week for which you want to run the report.
3. (Optional) Select **Setup and Teardown Time**.
4. (Optional) Enter a number of minutes in **Exclude turnaround times greater than** .
5. Select the data you want to appear on your report.
   - **Trends**: Choose how you want your report broken down. **Period Summary** breaks down stats from the chosen time period into days of the week—Monday’s Stats, Tuesday’s Stats, etc.

- Choose the **Facilities**, **Rooms**, and/or **Room Groups** combination you want to see on the report.

Note: You must select at least one facility and one room.

6. After choosing the data you want to appear on your report, click **Print**.
7. Your OR Turnaround Statistics Report prints.

Report Statistics

The following statistics appear on your OR Turnaround Statistics Report:

- **Average Time**: The average time between cases within each room.
- **SD**: Standard Deviation. The number under SD represents minutes; it tells you the degree to which each value on a list varies from the mean of all values on the list. The smaller the standard deviation, the less each value varies from the mean.

Cost Analysis Report

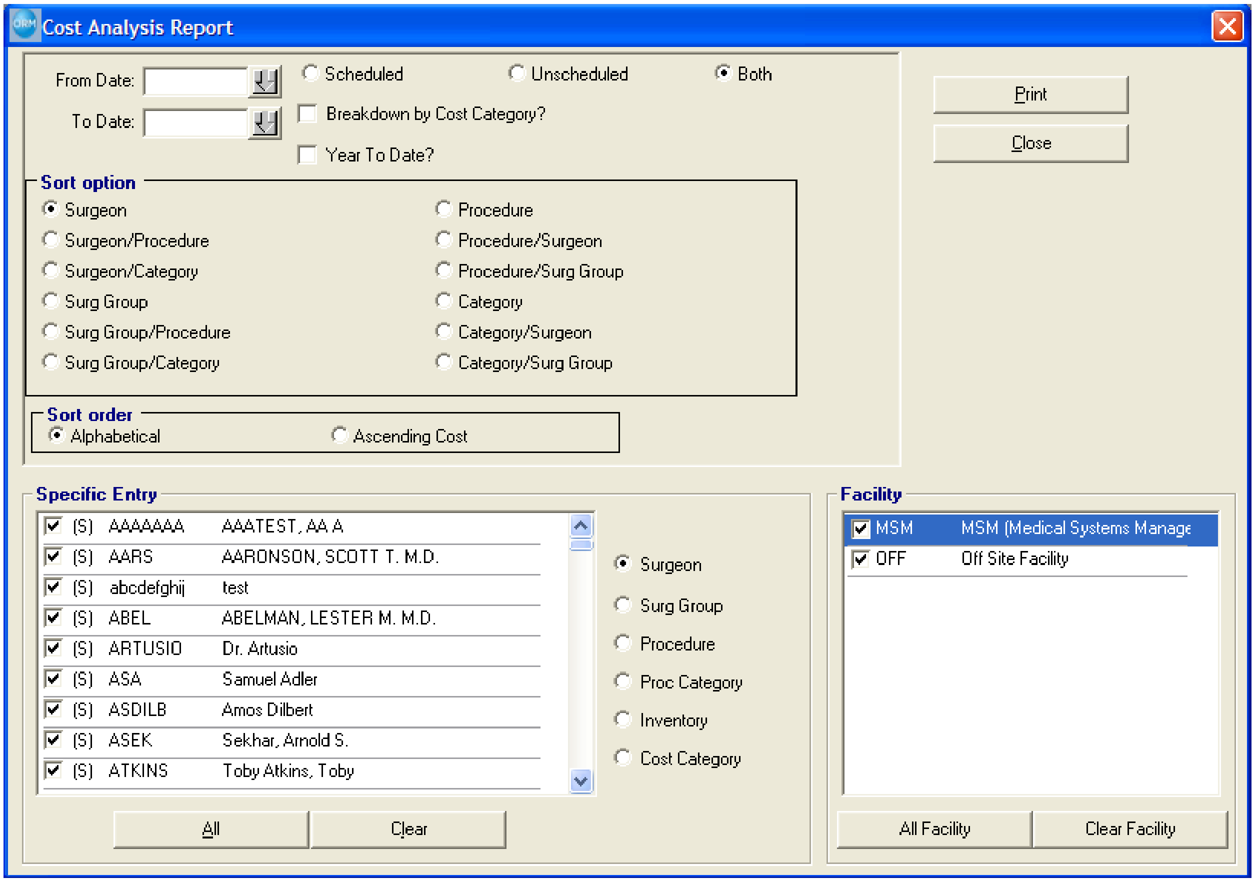
Menu:Reports > Cost Analysis

The OR Manager Cost Analysis Reports allow you to see a break down of OR costs by a variety of criteria. Statistics for these reports come from case records placed in a Complete status. This report includes complex cases, which are cases with more than one surgeon or procedure.

Generate a Cost Analysis Report

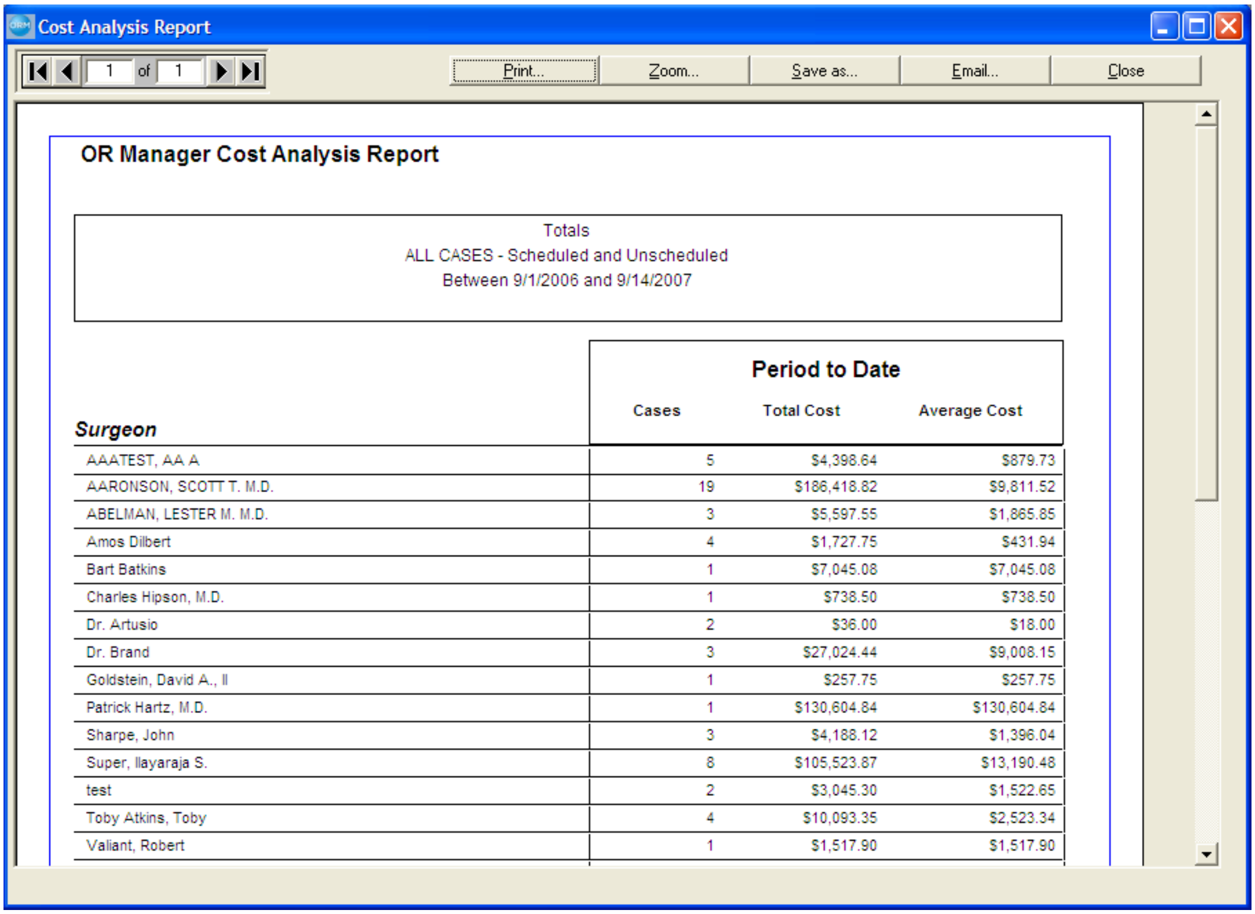
1. Select **Reports > Cost Analysis**.

   The Cost Analysis Report screen opens.



2. Choose the information you want included on your report.
   - **Breakdown by Cost Category**: Select to see a row for each cost category on the report. For example, if you sort by surgeon, the report shows the surgeon's name and a summary line for each cost category.
   - **Year to Date**: The stats are from January 1 through most recent date specified in the Period to Date. See *Year to Date on page 267* unless otherwise specified.
   - **Scheduled/Unscheduled**: Scheduled case records are linked to a specific booking; unscheduled case records are not linked to bookings.
   - **Sort Option**: Select how you want your report sorted.
   - **Specific Entry**: The Specific Entry List changes according to the **Specific Entry** you select. Select items you want included on your report.
3. Use the radio buttons and the check-boxes in the screen at the bottom of the screen to select the set of data that you want to report on. You can choose the data to be included in the report from any combination of Surgeons, Surgeon Groups, Procedures, Procedure Categories, Cost Categories, and/or Inventories.

4. After you have selected the data you want on your report, click **Print**.
5. Your Cost Analysis Report appears.



OR Manager Cost Analysis Report

Totals
ALL CASES - Scheduled and Unscheduled
Between 9/1/2006 and 9/14/2007

	Period to Date		
Surgeon	**Cases**	**Total Cost**	**Average Cost**
AAATEST, AA A	5	$4,398.64	$879.73
AARONSON, SCOTT T. M.D.	19	$186,418.82	$9,811.52
ABELMAN, LESTER M. M.D.	3	$5,597.55	$1,865.85
Amos Dilbert	4	$1,727.75	$431.94
Bart Batkins	1	$7,045.08	$7,045.08
Charles Hipson, M.D.	1	$738.50	$738.50
Dr. Artusio	2	$36.00	$18.00
Dr. Brand	3	$27,024.44	$9,008.15
Goldstein, David A., II	1	$257.75	$257.75
Patrick Hartz, M.D.	1	$130,604.84	$130,604.84
Sharpe, John	3	$4,188.12	$1,396.04
Super, Ilayaraja S.	8	$105,523.87	$13,190.48
test	2	$3,045.30	$1,522.65
Toby Atkins, Toby	4	$10,093.35	$2,523.34
Valiant, Robert	1	$1,517.90	$1,517.90

Note: The example above shows only one variety of OR Manager Cost Analysis Report. You have many choices when deciding the content, and layout, of your Cost Analysis Report.

Note: The report uses the cost on stock recorded in the Item/Stock Dictionary in the **Stocks** tab as Stock Cost information, unless no such data exists, in which case the item cost is used.

Conflict Override Report

Menu:Reports > Conflict Override Report

The Conflict Override Report gives you a list of all booking conflicts that were overridden during a specified time period. The report includes the following:

- Date, Time, Procedure, Surgeon and Room involved in the conflict that was overridden.
- The nature of the conflict(s), such as the surgeon not being authorized for the procedure or the room was closed.
- The mnemonic of the user who overrode the conflict.

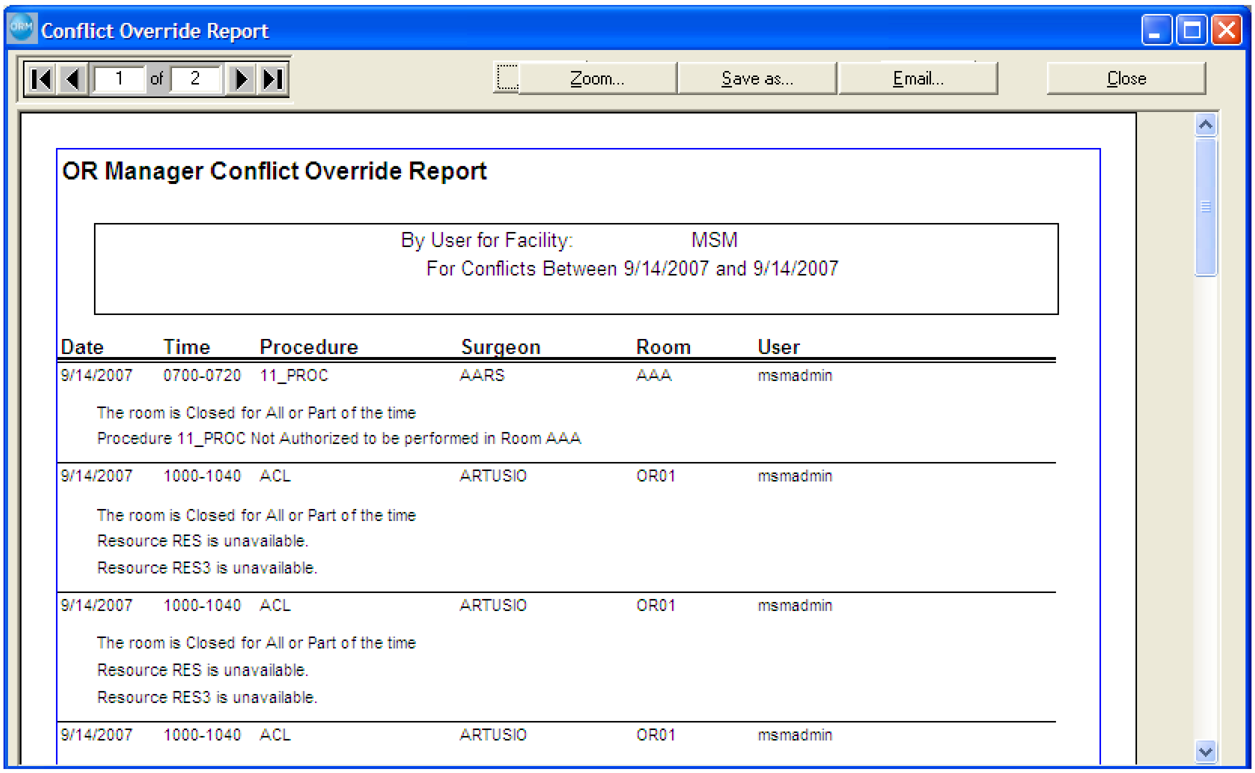
Conflict Override Screen

You use the Conflict Override screen to enter or select the following:

- The date range for which you want to see conflicts.
- The facilities for which you want to see conflicts.
- The sort order. The default is to sort the report by user mnemonic, but you have the option of sorting by conflict type.

Report

Click **Print** on the Conflict Override screen to print the report:



Implant Expiration Report

Menu:Reports > Implant Expiration Report

The Implant Expiration Report gives you a list of all implant items due to expire during a specified time period. The report draws information from the Implant Dictionary where stock implant items are entered (if you follow good work practices) and it does not refer to exception noting data which would cause it to report items that have been implanted.

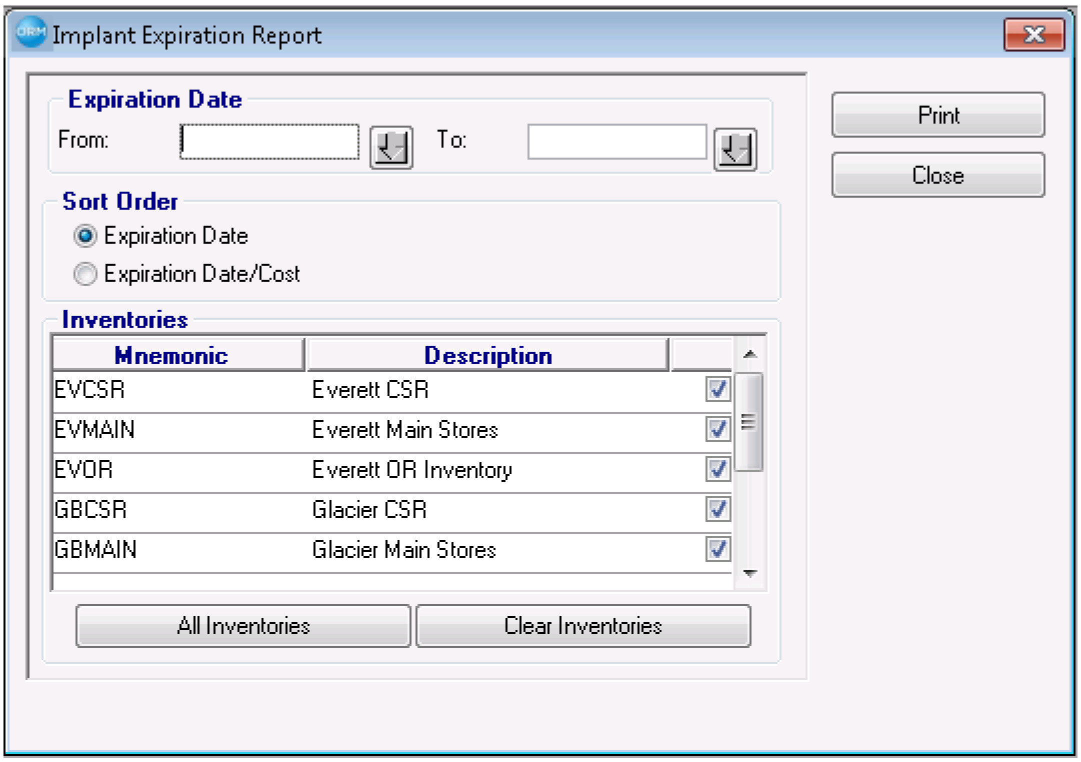
The report includes the following:

- Inventory/Stock number, Description, Serial number, Lot number and Cost and the Date of expiration.
- Unique Identifier is present to support tissue documentation.
- Implant type mnemonic appears next to stock description.
- Expiration data does not include a time of day.
- Implant Type indicates whether an item is tissue.

Implant Expiration Screen

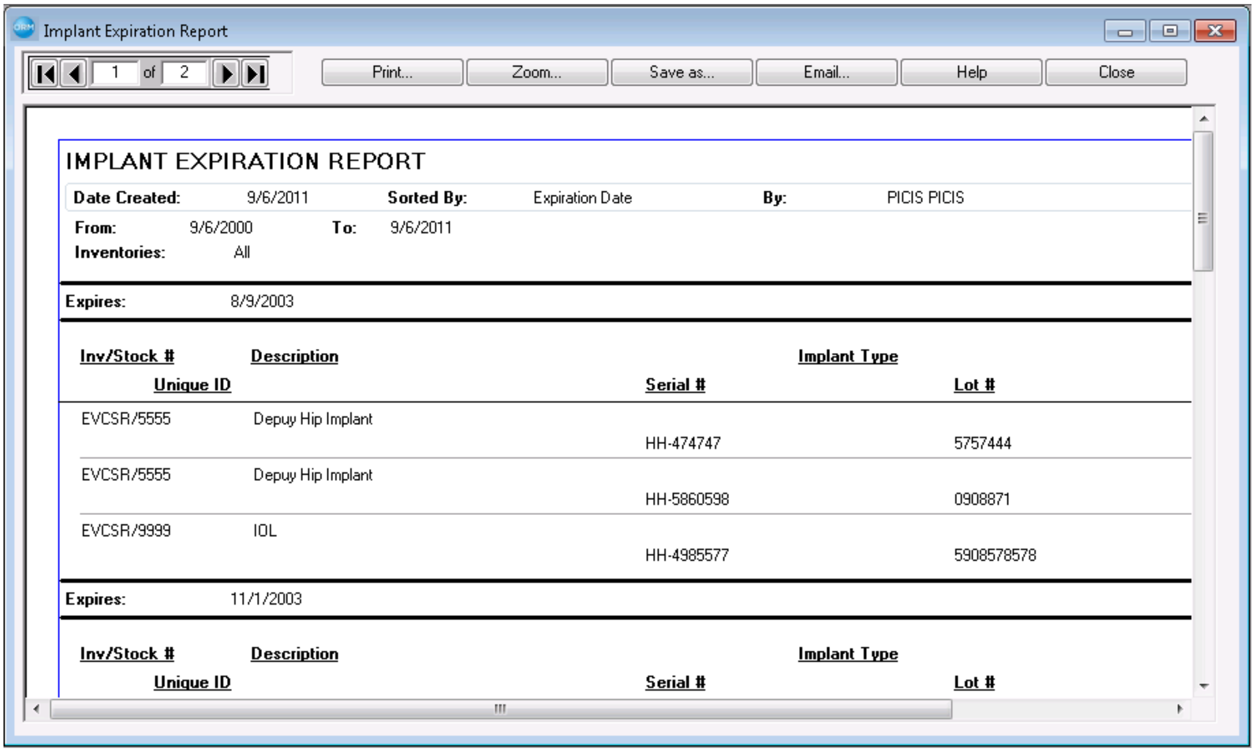
You use the Implant Expiration screen to enter or select the following:

- The date range for the expirations you want to see.
- The sort order. The default is by expiration date only, but you can also select by expiration date and then cost.
- The inventories to search for expiring implant items.



Report

Click **Print**on the Implant Expiration screen to print the report. The graphic below shows most of the report, while scrolling to the right-hand side would show another column for Total Cost.



Implant Usage Report

Menu:Reports > Implant Usage Report

The Implant Usage Report lists data about the usage of implant items that you specify. The report draws information from the Implant Dictionary and data entered in Exception Noting.

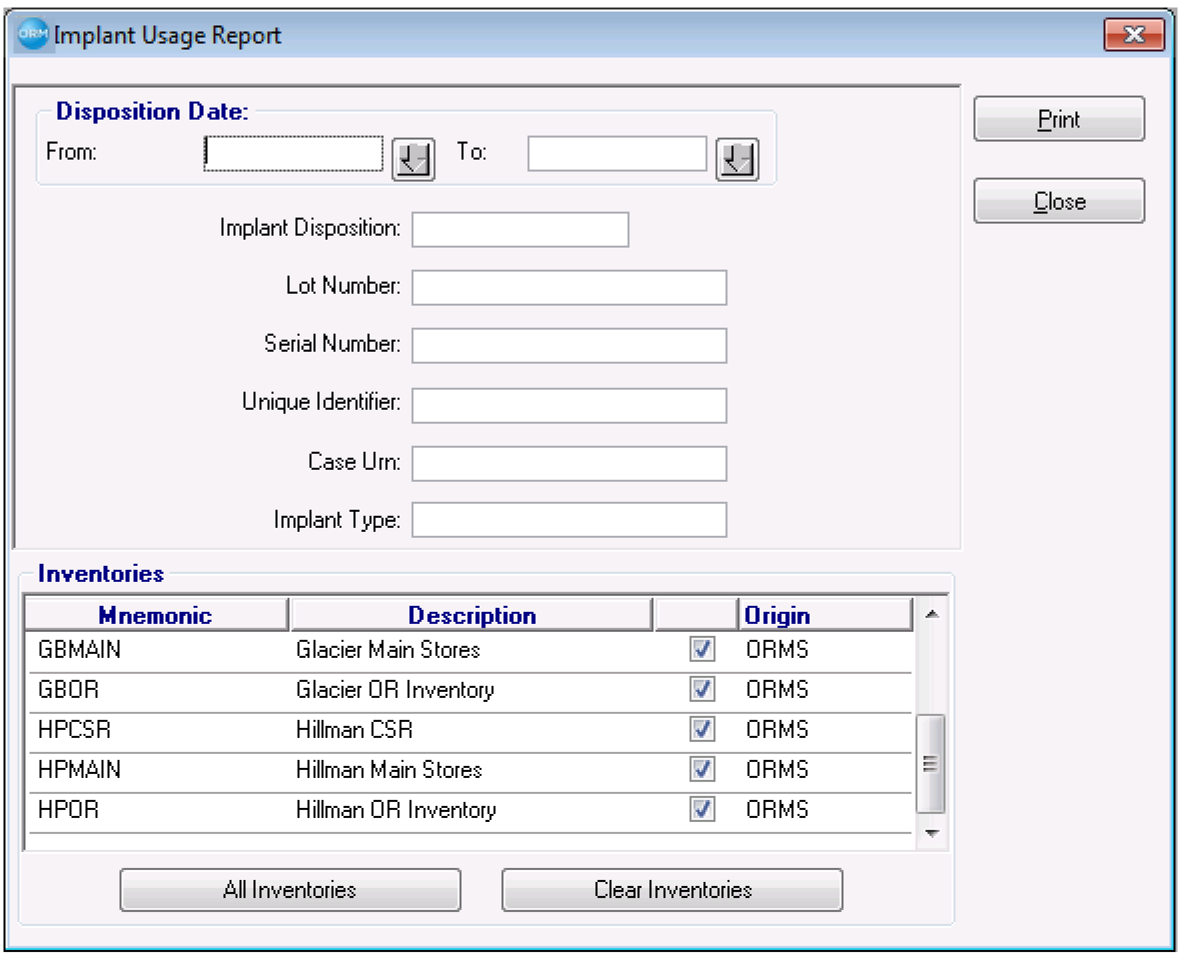
The report includes the following:

- Serial number, Implant Disposition, Disposition Comment, Lot Number, Disposition Date, Purchase Order Number, Case Urn Number, Buyer, Storage Temperature, Acquisition Date, Expiration date, and Active Status.
- The following fields store tissue data: Unique ID, Size, Type, Tissue Source.

Implant Usage Report Screen

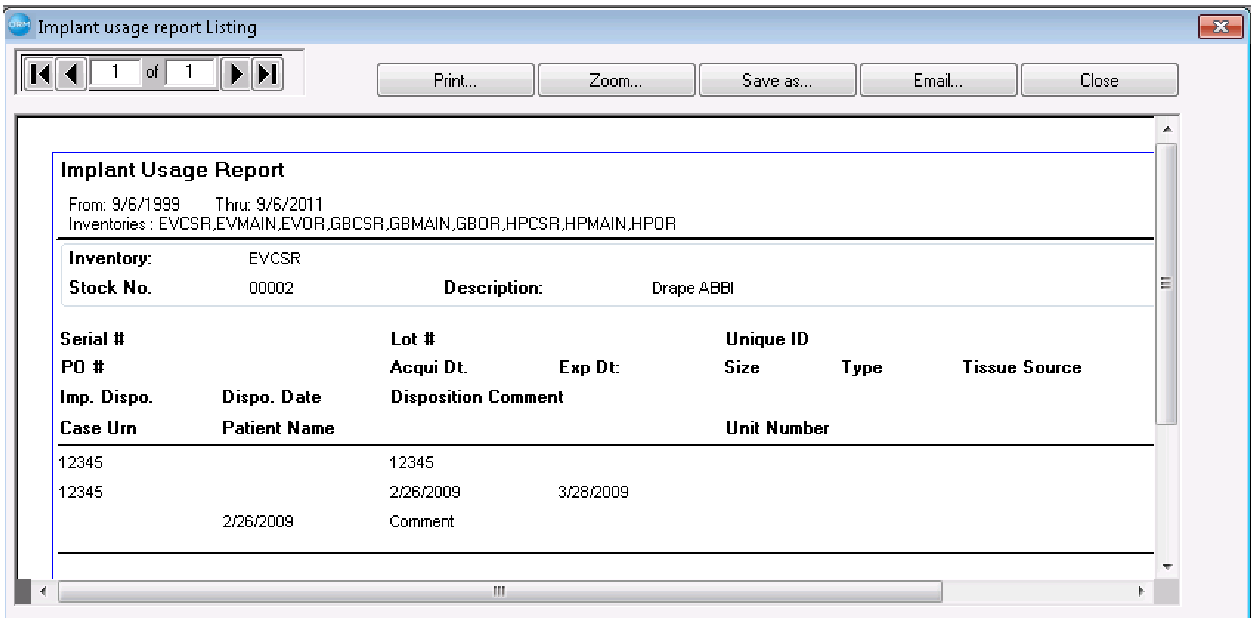
You use the Implant Usage Report screen to specify the report by selecting the following. You do not have to specify all elements:

- The Implant Disposition that you want to see.
- The Lot Number you want to see.
- The Serial Number that you want to see.
- Unique Identifier
- The Case Urn that you want to see.
- The Implant Type, which will be tissue or not tissue.
- In the Inventories list, you can check the boxes on the rows for the inventories that you want to report. **All Inventories** allows you to select all of the inventories in the list, while **Clear Inventories** deselects any selected inventories.



Report

Click **Print** on the Implant Usage Report screen to print the report.



Running External Reports

If your reporting needs are not entirely met by OR Manager’s standard reports, the use of external reports within OR Manager gives you the ability to build custom reports using OR Manager data. OR Manager is compatible with Crystal Report Writer and external reports must be written with this program if they are to use OR Manager data.

You can run external reports from various places in OR Manager depending on whether they are Manage Reports or Application Reports. In this topic, we show how to find and run each type of external report.

Accessing Application Reports

Application reports for bookings, case records, and preference cards are all accessible from the Reports menu:

To Get This Print Result, execute action in this table's right-hand column.	Select Reports > External. Then select option below.
Booking reports	Booking Reports
Case record reports	Case Record Reports
Preference card reports	Preference Card Reports

Note: The screen may include a “Select Facility” section listing the facilities to which you have rights. If so, select the facility for which you want to run the report.

Accessing Manage Reports

Manage Reports for bookings and case records are all accessed from the various manage screens on the Tools menu. (There are no Manage Reports for preference cards.) Use this table to locate the type of external report that you want to run:

Print Result	First Select: Tools > Manage	Second Step: Select Booking Records, and Click the Following
Booking reports	Bookings	**Print Schedules**
PAT booking reports	Pre-admit Bookings	**Print Schedules**
Case record reports	Case Records	**External Reports**
Case format reports	Case Records	**Print Case**, then select External Report

Run an External Report

To access the type of External Report you want, use the tables in *Accessing Application Reports on the previous page* and in *Accessing Manage Reports*. The External Reports screen appears listing the Application or Manage reports that you can access from the path you took and as allowed in Security Manager.

- **Print:** Select a report to print on the default printer. Select **Start** to begin the operation.
- **Export:** Select a report to export a copy of it to a file on the network. Select **Start** to begin the operation.
- **Preview:** Highlight the report you want to see, then click **Preview** to display the report.

External Report Screen Notes

- **Type column**: Tells you the type of report.
- **C**: Crystal Report
- **Export (Crystal Reports)**: Select to export a copy of the report to a file on the network.

Run an External Report Group

The *OR Manager Configuration Guide* describes how to configure groups of external reports and destinations that will receive them. To select an external report group and send it to the specified destinations, execute the following steps.

1. Select **Reports > External Report Group**.
2. In **Name**, select a group.
3. Click **Print** to run the group.

A

Appendix A: Perioperative Integration

Integration Overview

Hospitals that use Preop Manager, Anesthesia Manager, and PACU Manager with OR Manager can take advantage of perioperative integration (also known as "TPA") in which data entered in one application appears in others. Integration is achieved through the exchange of dynamic data.

Dynamic data refers to data that users enter as they document a perioperative encounter for a particular patient, or data that is received from an external system such as the HIS. In general, if more than one application can display a data element, its data is shared between these applications.

Patients booked for surgery in OR Manager can be easily found in the Census screen in Anesthesia Manager or PACU Manager. (The link between a particular booking and patient chart can be manually set at any time.)

Picis Perioperative and Critical Care Workflow

The logical workflow for interaction with Picis applications in a perioperative encounter is as follows:

OR Manager to create a booking

Preop Manager to create a preanesthesia evaluation

OR Manager to document surgical data (in a case record started on the day of surgery)

Anesthesia Manager to document anesthesia data

PACU Manager to finish the anesthesia record and document the patient's recovery from anesthesia

If **Critical Care Manager** is used, the patient chart in this application includes data from Anesthesia Manager and PACU Manager for postoperative patients

As soon as a booking or case record exists in OR Manager, the patient name appears on census lists in other modules like Preop Manager and Anesthesia Manager, allowing the patient record to be opened in these modules.

If the patient has a booking, the case record is started from the booking; if the patient does not, for example in an emergency surgery, an add-on case is started. After it is created, the case record supersedes the booking for the purpose of identifying the patient across modules.

Occasionally, when a preop or anesthesia record is started independently or when a patient change initiated in OR Manager is not possible in an integrated module for technical reasons, the record can be linked to a booking or case record later from the other module.

Data Flow Between Applications

Certain data is shared between linked records as follows:

- Between the booking and the preoperative record.
- Between the booking and the anesthesia record.
- Between the case record and the anesthesia record.
- Between the preoperative record and the anesthesia record.

Data flow for home medications, allergies, and precautions is always bidirectional; data flow for other types of data may be unidirectional or bidirectional, as described in the next section.

Note: Standard Shared Fields are defined by Picis and their definition and type cannot be edited.

When a preadmission is admitted in Anesthesia Manager, PACU Manager, or Critical Care Manager, any linked booking or case record becomes associated with the same encounter type as that of the workstation "template" in use at the time. Data flows between the booking (or case record) and the anesthesia record as long as the template is not changed to one that belongs to another encounter type.

Example: A hospital uses three clinical workstation templates—“Preop Holding”, “Anesthesia” and “PACU1”, the first two are associated with the encounter type “OR” and the last with the encounter type, “PACU”. A patient is admitted (from a preadmission) using the “Preop Holding” template. Data continues to flow between records when the patient is transferred to the “Anesthesia” template, but ceases to flow when the patient is later transferred to the “PACU1” template.

⚠ **CAUTION:** For some free text data elements, such as comments, the interface in Anesthesia Manager, PACU Manager, or Critical Care Manager allows more text to be entered than in the corresponding OR Manager interface.
For long comments that are shared between applications, an ellipsis is shown in Anesthesia Manager, PACU Manager, or Critical Care Manager as soon as entering any more text would give rise to truncation of data in OR Manager.

Data Elements

The following types of data can be integrated (shared):

- Allergies and precautions
- Anesthesia Type

  Note: Anesthesia Type is documented as an event in Anesthesia/PACU Manager.

- ASA type
- Demographic data (patient name, address etc.)
- Diagnoses—Preop, Postop and Surgical

  Note: (The "Surgical" diagnosis type exists in the "clinical modules" but not in OR Manager. Where data of this type flows to OR Manager it maps to the "Postop" type.

- Home Medications

- Medical Team—Anesthesiologist and Surgeon
- Milestone events. See *Milestone Fields* on page 168.

  Note: Only milestone events with event type "Milestone Times" are shared.

- Procedure (including any modified procedure entered in the OR Manger booking or case record)

Note: Information entered in the HIS updates all applications. If the HIS used is Meditech, modifications and deletions carried out in the HIS are reflected in OR Manager, Preop Manager, Anesthesia Manager, and PACU Manager.

See the *Guide to Dynamic Data Exchange*.

The following tables show where data entered in different applications appears in an integrated system.

Data entered in an OR Manager Booking			
Data	**Preop Manager**	**OR Manager Case Record**	**Anesthesia/PACU Manager**
Allergies and precautions	Yes	Yes	Yes
Demographic data	Yes	Yes	Yes
Diagnosis—Preop	Yes	No	Yes
Home medications	Yes	Yes	Yes
Medical Team—Anesthesiologist	Yes	Yes	Yes
Medical Team—Surgeon	Yes	Yes	Yes
Procedure	Yes	Yes	Yes

Data entered in Preop Manager			
Data	**OR Manager Booking Screen**	**OR Manager Case Record**	**Anesthesia/ PACU Manager**
Allergies and precautions	Yes	Yes	Yes

Data entered in Preop Manager			
Data	**OR Manager Booking Screen**	**OR Manager Case Record**	**Anesthesia/ PACU Manager**
Anesthesia Technique Planned	No	No	No
Demographic data	No	Yes	Yes
Diagnosis—Preop	Yes	Yes	Yes
Diagnosis—Postop	No	No	Yes
Diagnosis—Surgical	No	Yes	Yes
Home medications	Yes, if the booking is not linked to a case record. No, if the booking is linked to a case record.	Yes	Yes
Medical Team—Anesthesiologist	No	No	Yes
Medical Team—Surgeon	No	No	Yes
Procedure	No	Yes	Yes

Data entered in an OR Manager Case Record			
Data	**OR Manager Booking**	**Preop Manager**	**Anesthesia/ PACU Manager**
Allergies and precautions	Yes	Yes	Yes
Anesthesia Type	No	No	No
ASA Type	No	No	Yes
Demographic data	No	Yes	Yes
Diagnosis—Preop	No	Yes	Yes

Data entered in an OR Manager Case Record			
Data	**OR Manager Booking**	**Preop Manager**	**Anesthesia/ PACU Manager**
Diagnosis—Postop	No	No	Yes
Home medications	Yes	Yes	Yes
Medical Team—Anesthesiologist	No	No	Yes
Medical Team—Surgeon	No	No	Yes
Milestone events	No	No	Yes
Procedure	No	No	Yes

Data entered in Anesthesia/PACU Manager			
Data	**OR Manager Booking**	**Preop Manager**	**OR Manager Case Record**
Allergies and precautions	Yes	Yes	Yes
Anesthesia type	No	No	Yes
ASA type	No	No	Yes
Demographic data	No	Yes	Yes
Diagnosis—Preop	Yes	No	No
Diagnosis—Postop	No	No	Yes
Diagnosis—Surgical	No	No	Yes
Home medications	Yes, if the booking is not linked to a case record. No, if the booking is linked to a case record.	Yes	Yes

Data entered in Anesthesia/PACU Manager			
Data	**OR Manager Booking**	**Preop Manager**	**OR Manager Case Record**
Medical Team: • Anesthesiologist • Anesthesia Attending • Anesthesia Relief • Anesthesia Resident • CRNA • CRNA Relief	No	No	Yes
Medical Team—Surgeon	No	No	Yes
Milestone events	No	No	Yes
Procedure (anesthesia procedures only)	No	No	Yes

Concurrency

The OR Information screen, (accessed from Anesthesia Manager, PACU Manager or Critical Care Manager,) does not refresh whenever an integrated field is edited in OR Manager. Changes are not reflected until the user closes and re-opens the screen.

If two users try to change the same integrated field at the same time (one from Anesthesia Manager, PACU Manager or Critical Care Manager, and another one from OR Manager), the OR Information screen detects this scenario and displays a message to the user to verify whether or not they want to continue with the update.

For example: Field A has a value of “alpha”. This field is a booking level field.

1. User 1 (U1) opens the “OR Information” screen in Anesthesia Manager, PACU Manager or Critical Care Manager.
2. U1 clicks the “Admission” tab and Field A appears with the initial value “alpha”.
3. User 2 (U2) opens OR Manager and edits the booking related to the admission U1 is editing.
4. U2 opens the booking form where field A is located.
5. Field A appears there with its original value “alpha”.

6. U2 changes the value of Field A to “beta” and clicks **OK** to save.
7. U1 still sees “alpha” as the value and changes the value of field A to “delta” and clicks **OK** to save changes.
8. A message displays telling U1 that field A had been modified from “alpha” to “beta”, and asks the user for confirmation before setting the value to “delta”.
9. If U1 answers **Yes**, the new value of field A will be “delta”. If U2 answers **No**, the current value of field A remains “beta”.

> **Note:** Non-TPA sites should not use these fields for anything other than integrated fields, as they are already designated as part of the "TPA" installation should the site become "TPA" at any point in the future.

Integrated Fields

Integrated Fields are shared fields that sites define for themselves, for example, the definition, data type, etc.

The OR Information screen, (accessed from Anesthesia Manager, PACU Manager or Critical Care Manager,) does not refresh whenever an integrated field is edited in OR Manager. Changes are not reflected until the user closes and re-opens the screen.

If two users try to change the same integrated field at the same time (one from Anesthesia Manager, PACU Manager or Critical Care Manager, and another one from OR Manager), the last saved value is retained.

For example: Field A has a value of “alpha”. This field is a booking level field.

1. User 1 (U1) opens the “OR Information” screen in Anesthesia Manager, PACU Manager or Critical Care Manager.
2. U1 clicks the “Admission” tab and Field A appears with the initial value “alpha”.
3. User 2 (U2) opens OR Manager and edits the booking related to the admission U1 is editing.
4. U2 opens the booking form where field A is located.
5. Field A appears there with its original value “alpha”.
6. U2 changes the value of Field A to “beta” and clicks **OK** to save.
7. U1 still sees “alpha” as the value and changes the value of field A to “delta” and clicks **OK** to save changes.

   > **Note:** U2 will not see the updated value of "delta" until they close and reopen the screen.

8. Non-TPA sites should not use these fields for anything other than integrated fields, as they are already designated as part of the "TPA" installation should the site become "TPA" at any point in the future.

Note: Integrated fields can not be used with the stand-alone Anesthesia Manager application.

Changing the Patient Using OR Manager

It is possible to change the patient in a booking or case record in OR Manager. The change affects any linked records the patient has in other Picis Perioperative and Critical Care modules such as Preop Manager, Anesthesia Manager and PACU Manager with certain exceptions. Similarly, you can link records created in these modules to records in OR Manager.

- A patient change would be necessary in the following situations:
- The patient name and/or medical record number in the booking is incorrect.
- The account number in the case record is incorrect.
- The case record was started for the wrong booking.
- An add-on case for an anonymous patient was started with a temporary name and identifier and the patient has since been identified.

If a case record has not yet been started, any change to the patient in the booking affects records in Preop Manager and Anesthesia Manager.

After a case record is created, any change of patient must be performed in the case record in order to update the records in the other modules; a patient change in the booking would have no effect on the other modules.

Following a patient change in a booking or case record, users of Anesthesia Manager and Preop Manager would observe the following behavior:

If	Then
A linked record is open for the patient in the other module…	That module will display a message notifying the user of the change and then update any open record automatically. After the change, the anesthesia record will display the Home screen; any online changes to the configuration of the patient chart will be lost because the system restores the default configuration when changing the patient.

If	Then
The module is already open but no linked records are open and the Census screen is displayed…	The next time a user attempts any action in the screen, the system will inform her that a change has been made and prompt her to refresh the list. By acknowledging the prompt, the user refreshes the list. The updated census list will then show the post-change patient name.
The module is opened after the patient change…	The census list will display the postchange patient name.

(The Events log in Anesthesia Manager and PACU Manager contains an entry noting the change and referencing the Patient ID of the previous patient. Internally, the audit trail will include an entry for the patient change.)

Considerations

When changing the patient in OR Manager, you should be aware that patient-specific data in the anesthesia record will be overwritten by the data for the second patient. Before changing a patient, you should review the record to make sure that it does not contain data corresponding to the second patient.

For example, you have a case record for N. Tremont with a linked anesthesia record, but the correct patient is F. Clark; the Tremont record contains an allergy that pertains to F. Clark; you change the patient in the case record; the allergy is lost because patient data from the HIS for F. Clark overwrites the patient data for N. Tremont.

Patient-specific data, such as allergies and precautions, entered in Preop Manager and/or Anesthesia Manager may be lost if a patient change is performed in OR Manager using patient data from the HIS. To avoid this, Picis recommends adding allergy and precaution information only in the HIS to avoid problems with data synchronization.

Action	Result
Booking started for P. Jones from the HIS.	Patient-specific data is imported from the HIS into the booking.
Case record started for L. Smith from the HIS.	Patient-specific data, including a Penicillin allergy, is imported from the HIS into the case record.
An evaluation is started in Preop Manager for L. Smith based on the case record and a Latex allergy is added to the preop evaluation.	The preop evaluation shares data with the case record. Both the case record and the preop evaluation now list two allergies: Penicillin and Latex.
The patient is changed in the booking from P. Jones to L. Smith.	The booking sends the HIS patient data for L. Smith to the preop evaluation - only the Penicillin allergy; the Latex allergy is lost.
Solution: Add any allergy to the case record and save the record. Then delete the allergy.	The system will send all allergy information from the case record to the preop evaluation again, synchronizing the records.

Restrictions

In certain cases, other modules will reject a patient change in order to maintain data integrity in existing records. When this happens, OR Manager displays the following message:

This change does not affect any linked records in other Picis Perioperative and Critical Care applications.

Do you want to proceed?

If you click **Yes**, the patient changes only in the booking or case record; records in the other modules continue to use the original patient name and data entered in one record do not flow to the other. If you click **No**, the patient change does not occur in any module.

Other modules are unable to comply with patient changes in the following situations:

- The second patient has an open admission in another module and that admission contains data from an earlier encounter. For example, Anesthesia Manager would be unable to comply if the second patient's Picis admission included an earlier stay in the ICU.
- The other module contains records for Picis admissions for both the original and second patient and these admissions overlap.

Example:

An unidentified emergency patient, J. Doe, arrives in surgery. The patient's real name is Rebecca Smith and she has an open Picis admission but is currently “in transfer.”

An add-on case is started under the name J. Doe with a temporary patient ID.

A record is started in Anesthesia Manager for J. Doe.

After surgery, the patient's anesthesia record is transferred when the patient leaves.

When J. Doe arrives in the PACU, you try to change the patient in her case record to Rebecca Smith. The system detects the open Picis admission for Rebecca Smith and informs you that the change, if carried out, will not trigger a corresponding patient change in the anesthesia record for J. Doe.

What would happen if you discharged Rebecca Smith and tried the change patient again? The change would still be rejected because J. Doe's Picis admission contains some overlap with the admission for Rebecca Smith. (The system cannot reconcile the two sets of data for the same time period.)

- The link between the record in OR Manager and the record in the other module was created manually from the other module before the patient change attempt.
  - For example, a record was started in Anesthesia Manager and then linked to a booking; you try to change the patient in the booking.

In these cases, you can proceed with the change in OR Manager but the corresponding records in the other modules will not follow; after the change, the records will no longer share data.

In other cases, a patient change in OR Manager will not be detected by the other modules:

- You change the patient in the booking after a case record was started. After a case record is created, the case record carries the patient identity in the integrated system. Changing the patient in the booking would sever the link between the booking and the other records. If a patient change must be reflected in both the booking and the case record, you should perform the action separately in both records. Only the change in the case record will affect the other modules.
- You have a booking that is linked to an open record in another module and you attempt link a case record to that booking.
  - For example, a record was started in Preop Manager and then Anesthesia Manager based on a booking in OR Manager. You start an add-on case for the same patient and then link that case record to the booking. The case record will be linked to the booking but the not to the records in Preop Manager and Anesthesia Manager.

In these situations, you may be able to link to the record in OR Manager manually from by using the Link Record command on the File-ADT menu in Anesthesia Manager, PACU Manager or Critical Care Manager.

Troubleshooting: Frequently Asked Questions

Q. I started a case record by right-clicking a booking in the OR Schedule Viewer. Why don't I see the new patient name on the schedule grid?

A. Changing the patient in the case record does not affect the booking. If you need to see the changed patient name on the grid, you must edit the booking separately.

Q. I changed the patient in a booking at the same time as I had a record for the same patient open in Anesthesia Manager. Why didn't the patient change on the record in Anesthesia Manager?

A. Did a case record exist in OR Manager before you changed the patient in the booking?

-If so, repeat the patient change in the case record and it will change in Anesthesia Manager.

-If not, did you start the record in Anesthesia Manager under the name of the second patient before you changed the booking to show the same patient? You can link the anesthesia record to the case record by using the Link Record command on the File-ADT menu.

Q. I have an anesthesia record that is linked to a booking. If I link a case record this booking, will the case record and the anesthesia record share data?

A. No. You would have to enter data for overlapping fields in both records.

Q. I changed the patient in a case record. When I look at the patient's record in Anesthesia Manager, I see that the allergies and precautions I entered before the change are gone.

A. When performing the change, you selected a patient that already existed in the system. The updated record adopted the patient data from this record. If the data you entered in Anesthesia Manager before the change is valid for the patient whose name is now on the record, you must enter it again.

Q. I want to change the patient in a case record to a new patient in the system. I can't find a New Patient button in the screen.

A. You can only create a new patient when changing the patient in a booking. If the case record hasn't been started yet, you can click Cancel to close the screen (without saving changes), change the patient in the booking and then create the case record.

Q. I changed the patient in SmarTrack. Why don't I see the change in the record I have open in Anesthesia Manager.

A. The change won't appear in Anesthesia Manager until you create a case record.

Q. I picked the wrong booking when creating the case record (Jones instead of Smith, for example). I want to change the patient in the case record to Smith but I have valid records for the real patient Jones in Preop Manager. What will happen to this patient's data?

A. Patient changes in OR Manager affect all linked records in Picis Perioperative and Critical Care, therefore the preoperative record for patient Jones will be transferred to patient Smith. You can correct the situation manually as follows:

1. Change the patient in the case record from Jones to Smith.
2. Open Preop Manager and print the summary for patient Jones' preoperative evaluation (now under the name of patient Smith).
3. Review the data for accuracy.
4. Delete all data in the Preop Manager record that does not apply to the patient Smith.
5. Start a new preoperative record for patient Jones.

B

Appendix B: Theatre Manager for UK Sites Only

Overview

Theatre Manager is the UK version of OR Manager. The differences in functionality are as follows:

- US terminology has been replaced by UK terminology. See *Terminology Differences* on the next page
- Block Time editing has enhancements. See *Block Time Screen* on page 326.
- Bookings:
  - Entering a surgeon in a booking is optional.
  - Bookings include a Consultant and Consultant Anaesthetist field.
  - In Search List Results, a Block Description is present.
  - Booking Audit Trails include Consultant information.

  See *Bookings* on page 326.
- Case Records:
  - A Consultant Surgeon Field is included in Case Records.
  - Case Record Field Mapping includes Consultant fields.
  - The Consultant field and Consultant Anaesthetist field in cases is audited.

  See *Case Records* on page 327.
- Consultant Blocks may be checked for conflicts. See *Conflict Checking for Consultant Blocks* on page 327.

- Custom Picklists: These include Consultant and Consultant Anaesthetist information. See *Custom Picklist* on page 327.
- Custom Worksheets: These include Consultant and Consultant Anaesthetist information. See *Custom Worksheet* on page 328.
- Manage Bookings:
  - Information for Consultant, Consultant Anaesthetist, and Modification Reason are visible in Manage Booking screens.
  - Consultant Surgeon is a search parameter and information in Manage Bookings.

  See *Manage Bookings* on page 328.
- Manage Case Records:
  - Information for Consultant and Consultant Anaesthetist are visible in Manage Case Records screens.
  - Consultant is a search parameter and information in Manage Manage Case Records.
  - Add-on cases include a field for a consultant.

  See *Manage Case Records* on page 328.
- NHS Number: Theatre Manager displays the NHS number in all screens and printouts that have patient data. See *NHS Number* on page 329.
- Reports: The following reports include consultant information:
  - Theatre Schedule Report
  - Basic Daily/Monthly Schedule Report
  - Detailed Daily/Monthly Schedule Report
  - Canceled Bookings Report
  - Session Time Utilization Report
  - Basic Conflict Override Report
  - Doctor Utilisation Report (also shows surgeon or group).
  - Consultant Average Case Length Report.
- The Schedule Viewer allows one to select Consultant and Consultant Anesthetist selection. See *Schedule Viewer* on page 331.
- The European date format is used for display and data entry.
- Addresses can include the County field and UK postal codes.

Terminology Differences

The following table shows diferences in terminology.

US Term	UK Term
Block	Session
Room Location	Theatre
Anesthesiologist	Anaesthetist
Anesthesia	Anaesthesia
Color	Colour
Billing	Accounting
Utilization	Utilisation
OR	Theatre
Tear Down	Clean Up
Wait List	Emergency List
#	No.
Mnemonic	Short Code
Social Security Number	NHS No.
SSN, SS #, SS#	NHS No.
Minimize	Minimise
Authorization	Authorisation
Authorize	Authorise
Zip or Zipcode	Post Code
Capitalize	Capitalise
Catalog	Catalogue
Nbr	No.
Anes	Anaes
Mnc or Mnem	Short Code
Canceled	Cancelled
Canceling	Cancelling
Anesthetist	Anaesthetist

Quick keys have been updated to reflect UK terms.

Block Time Screen

The Block Time screen has additional fields:

- **Primary Consultant**
- **Surgeon**
- **Consultant Anesthesiologist**
- **Anesthesiologist**

The Block Time list has an additional radio button:

- **Consultant Surgeon**

Bookings

The booking screen has additional boxes:

- Consultant Anaesthetist
- Consultant

A consultant must be selected when creating a booking. The entry of a surgeon is optional. If the user does not make an entry, available Procedure/Facility defaults provide a value. If Procedure/Facility defaults cannot provide a value, the booking can be saved with the field blank.

Block Description in Search List Results

The **Search List** tab opens as a result of using SEARCH LIST method on the **Booking**tab. Executing the search creates a room list, from which you can select a room. Block Descriptions appear in the room list.

- Consultant Anaesthetist

Booking Audit Trails

The audit trails for bookings show the following mnemonics:

- Consultant Surgeon

Case Records

The Case Record includes an additional field:

- Consultant Surgeon

A case cannot be saved without a value in the Consultant Surgeon Field. By default, the value in the Consultant Surgeon field is the value in the Consultant Surgeon field in the associated booking.

Add-on Cases

The Add-on case screen has an additional box:

- **Consultant**

Field Mapping

Consultant Utilization From and Consultant Utilization Thru times appear on the Case Record Field Mapping screen.

Case Record Audit Trails

The audit trails for cases show changes to the Consultant field and changes to the Consultant Anaesthetist field.

Conflict Checking for Consultant Blocks

Blocks can be created with consultants. Conflict checking can identify the selection of a consultant who is not the consultant for the block. Such a conflict may be overridden.

Custom Picklist

The Custom Picklist header may be configured to show either or both of the Consultant fields:

- Consultant mnemonic.
- Consultant description.

Alternatively, the header may be configured to show either or both of the Consultant Anaesthetist fields:

- Consultant Anaesthetist mnemonic.
- Consultant Anaesthetist description.

Custom Worksheet

The Custom Worksheet may be configured to show either or both of the Consultant fields:

- Consultant mnemonic.
- Consultant description.

Alternatively, the Worksheet may be configured to show either or both of the Consultant Anaesthetist fields:

- Consultant Anaesthetist mnemonic.
- Consultant Anaesthetist description.

Manage Bookings

The Consultant Surgeon can be selected as a search term in Manage Bookings.

The values for Consultant, Consultant Anaesthetist, and Modification Reason are visible in the Manage Bookings screens:

- View Audit Trail.
- View Booking.
- Picklist.
- Worksheet.
- Print Booking.

Manage Case Records

The Consultant can be selected as a search term in Manage Case Records.

The values for Consultant and Consultant Anaesthetist are visible in the Manage Case Record screens:

- Accounting History.
- View Audit Trail.
- Field Level Audit Trail.
- Print Case.
- Anywhere the Standard Case Record Printout is located.

NHS Number

Theatre Manager displays the NHS number on any screen where patient data appears. The NHS number also appears in any printouts that contain patient data.

Users can search for patients in Theatre Manager using the NHS number via Enter/Edit Case Records, Add-on Case Records, and SmarTrack Add-on Case. Searches on partial NHS number entries are allowed in these contexts, for example the search string “333” will display results with all NHS Numbers starting with “333.” However, searches in bookings require searching on the full NHS number.

Reports

Theatre Schedule Reports

The Consultant field appears in the Criteria Selection screen and the Report Output.

- Criteria Selection screen:
  - Date/Consultant Sort.
  - Consultant/Date Sort.
  - Consultant Criteria Selection.
- Report Output:
  - Consultant Description is in Output.
  - Consultant Anaesthetist Description is in Output.

Basic Daily/Monthly Schedule Report

The Consultant field appears in the Criteria Selection screen and the Report Output.

- Criteria Selection screen:
  - By Consultant report option.
  - Consultant can further break down request.
  - Consultants is in Selection Options.
- Report Output:
  - Consultant is in Output.

Detailed Daily/Monthly Schedule Report

The Consultant field appears in the Criteria Selection screen and the Report Output.

- Criteria Selection screen:
  - By Consultant report option.
  - Consultant can further break down request.
  - Consultants is in Selection Options.
- Report Output:
  - Consultant is in output.

Canceled Bookings Report

The Consultant field appears in the Criteria Selection screen and the Report Output.

- Criteria Selection screen:
  - Consultants Criteria Selection Area.
  - By Consultants sort.
  - By Consultants/Reason sort.
  - Add By Reason/Consultants sort.
- Report Output:
  - Consultant is in By Reason/Surgeon Report.
  - Consultant is in By Surgeon/Reason Report.
  - Consultant Sort Report.
  - Consultant/Reason report.
  - Reason/Consultant report.

Session Time Utilization Report

The Consultant field appears in the Criteria Selection screen and the Report Output.

Criteria Selection screen:

- Consultant Surgeon is in **Specific Entries** Tab.
  - Consultant Surgeon is first choice and default.

- Report Output:
  - Consultant Surgeon Session Utilisation Report corresponds to the Consultant Surgeon parameter in the **Specific Entries** tab.

Conflict Override Report

The following selections can be made for the Conflict Override Report:

- Consultant is in the report.
- Consultant session conflicts appear in the report.

Doctor Utilisation Report

Theatre Manager includes a Doctor Utilisation Report. It is similar to the Surgeon Utilization Report in OR Manager. The Doctor Utilisation Report may be displayed by selecting **Doctor Utilisation** from the **Reports** menu.

The Doctor Utilisation Report has three options for showing personnel:

- Selected consultants
- Selected surgeons
- Selected surgeon group

Average Case Length Report

A Consultant Average Case Length Report is available from the **Reports** menu.

Schedule Viewer

The Schedule Viewer allows you to select the following:

- **Consultant**
- Consultant Anaesthetist

C

Appendix C: Supply Cabinet

Introduction

At sites that have OR Manager with supply cabinet functions, OR Manager and the supply cabinet exchange messages to automatically document supplies from the supply cabinet in the exception noting screen.

This chapter provides detailed instructions about using OR Manager integrated with the supply cabinet. This integration will be called the *interface* in this chapter because an interface in software sends and receives messages.

Picis personnel help to set up the interface. The activities by Picis personnel are discussed in the following appendix in the *OR Manager Configuration Guide*: Supply Cabinet Setup.

This chapter covers:

- *Overview of the Supply Cabinet Interface*
- *Picklist Features for the Supply Cabinet*
- *Responding to Supply Messages and Error Messages*

Overview of the Supply Cabinet Interface

The following steps describe the use of the interface:

1. The user creates a booking or an add-on case.
2. The user performs an action that causes the interface to send a message to the supply cabinet, notifying the supply cabinet that a patient has been scheduled for services. Messages sent from OR Manager to the supply cabinet are called *outbound messages*. Outbound messages contain information for a case or booking. Outbound message are sent upon the following events:
   - **Printing a picklist**: Printing a picklist from OR Manager sends outbound messages to the supply cabinet. A picklist should be printed when an account number is assigned or upon any change in information, such as procedure or date of service. Printing a standard picklist activates an outbound message, but the picklist does not show a unique number available in custom picklists that allows tracing the operations of the interface. Printing a worksheet does not trigger the outbound supply request message to be sent. Printing a picklist from SmarTrack does not activate an outbound message. Information about picklists and worksheets at sites with the interface appears later in this document. See *Picklist Features for the Supply Cabinet* below.
   - **Saving an add-on case record**: Saving an add-on case record sends an outbound supply message.
   - **Opening a case record**: If an outbound supply message for a case record has not been sent, opening the case record sends such a message.
   - **Changing patient**: Changing the patient in the case record sends an outbound supply message. This function should be performed when an account number is assigned or changed.
3. Supplies for the patient are pulled from the supply cabinet, returned to the supply cabinet, or wasted. OR Manager automatically receives and stores messages from the supply cabinet about these transactions. Messages that the supply cabinet sends to OR Manager are called *inbound messages*. Inbound messages consist of the withdrawal, return, or waste of supplies.
4. Inbound messages are stored until the exception noting screen opens for the case or until they are processed separately. Upon those events, the exception noting screen shows the supplies processed for the case record, and error messages may be generated. Supplies are shown with the quantity sent by the interface or the quantity zero if no quantity has been sent. Hospital personnel view the supplies processed and view corrections indicated by error messages. See *Responding to Supply Messages and Error Messages* on the facing page.
5. If it is necessary to examine transactions involving the interface, an audit trail is available.

Picklist Features for the Supply Cabinet

It is necessary to create custom picklists for sites that have the interface in order to display the Supply Cabinet check box. Standard picklists do not display the Supply Cabinet check box.

Custom picklists printed for a booking or an add-on case record show the Supply Cabinet check box for each stock record to differentiate between stock subject to supply cabinet processing and stock not subject to interface processing. If the check box is selected, the stock in the record can be processed by the interface.

When a custom picklist is printed for a booking or an add-on case record, a unique identifying number is generated for the interface. The number can be made visible on the report. This number can be used in tracing the operations of the interface.

Responding to Supply Messages and Error Messages

Sites with the interface need to perform several tasks to make sure that supplies are correctly accounted for:

- Information about changes in supplies appears in the Exception Noting screen. It must be saved as part of the normal work process. See *Exception Noting* below.
- Error messages may occur. These are displayed from a menu selection in the Exception Noting screen. See *Error Messages* on page 337.
- Resolution of supply information may be required for completed cases. See *Completed Cases* on page 339.

Exception Noting

OR Manager processes supply cabinet messages when the exception noting screen is opened. If the exception noting screen is locked or the case is closed, messages are not processed. No new messages are processed while the Exception Noting screen is open; the new messages will be processed when the Exception Noting screen is reopened.

See *Edit Case Data Tab: Exception Noting* on page 169 for general information on exception noting. This section discusses features added for the interface.

If OR Manager's processing of messages result in updates, the Exception Noting screen displays a request for the saving of changes.

Saving the changes is part of the work flow for the interface that helps to assure that all supplies are accounted for. Saving the changes stamps them for audit purposes as performed by the current user.

The following table helps in understanding the Exception Noting screen at a site with the interface by listing its visual features and by describing how it represents data:

Feature	Exception Noting Screen Behavior
item update	When a supply cabinet message is sent, processing checks whether the item exists on the exception noting screen with the Supply Cabinet indicator selected. If there is an exact match, the line item is updated.
new line	A new line is added if the item does not exist on the frozen picklist or if the item cannot be updated by the interface. A new line is added if the conditions for item update do not apply. Those conditions are described in the preceding entry in this table.
Supply Cabinet check box	Each line in the screen has a non-editable Supply Cabinet check box near its right-hand end. If the check box is selected, it indicates a supply that the interface can update.
Collapsible Items	Two stocks that have the same item number on the exception noting screen, one identified as stock updated by the interface and the other identified as stock that is not updated by the interface, will collapse together.
Merging Stock	Two stocks that have the same item number on the exception noting screen, one identified as stock updated by the interface and the other identified as stock that is not updated by the interface, will not merge.
ORMS Inventory	ORMS Inventory cannot be updated by messages from the supply cabinet, even if it is in a Supply Cabinet section in the preference card. (The term ORMS stock indicates stock created by and managed by OR Manager.)
Implants	Implants that are mentioned in the messages sent by the supply cabinet are matched to OR Manager implant items if both lot numbers and serial numbers match or if neither type of number is in the messages. In other cases a new line appears on the Exception Noting screen.
Tray/Pack/Kits	Tray/Pack/Kits and Tray/Pack/Kit nested stock cannot be updated by messages from the supply cabinet and such items never have a selected Supply Cabinet check box.
Use Area	Use Area is not included in messages from the supply cabinet. OR Manager will update the line item that is first in the list on the Exception Noting screen if use area is the only difference between supplies that appear twice on the Exception Noting screen.

Feature	Exception Noting Screen Behavior
Scanned Items	If an item is scanned into the Exception Noting screen and is set as a supply cabinet item, a user with permissions can update the item. If an item is listed twice, once as an item that the interface can update, and once as item that the interface cannot update, the user of the scanner sees whichever item is listed first in the Exception Noting screen. Scanning in Exception Noting shows both the supply cabinet and non-supply cabinet stocks, and the user must select one before editing quantity if permissions allow. If only a supply cabinet stock shows in scanning, the user can edit quantity immediately if permissions allow.
Preference Card Operations	Overwriting a preference card is possible. Overwriting a preference card deletes supplies already sent by the supply cabinet from the Exception Noting screen. See *Overwrite Existing Supplies* on page 192 for general information on overwriting preference cards. Appending a preference card is not available.
Facility-Inventory Mapping	If the supply cabinet sends a supply for a case that is not mapped to the same facility as the case, OR Manager processes it and displays the record in red characters.

The Enter/Edit Supply screen is used in exception noting. Sites with the interface see a non-editable Supply Cabinet check box in the Enter/Edit Supply screen. A selected status for the check box indicates a supply that the interface can update.

The Implant button in the Enter/Edit Supply screen is inactive for any stock that shows a selected Supply Cabinet check box. This prevents OR Manager from overwriting implant data sent from the supply cabinet.

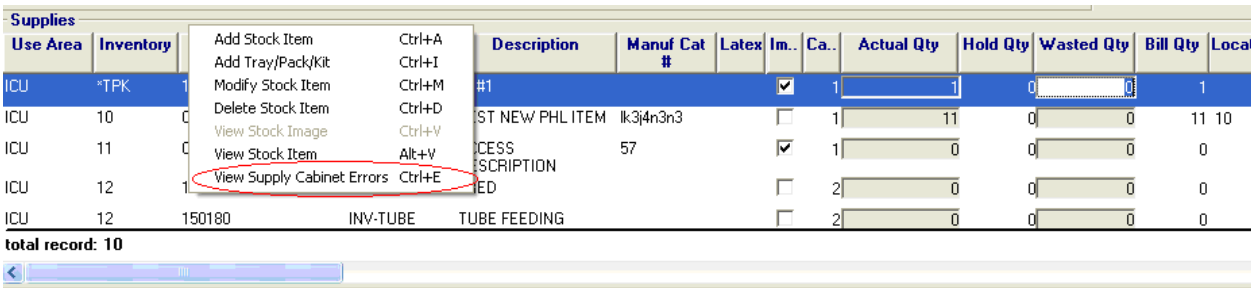
The information that a user can edit in exception noting is limited by permissions set by administrators. Permission is needed to delete and to edit quantity, lot number, or serial number for a supply cabinet item.

Error Messages

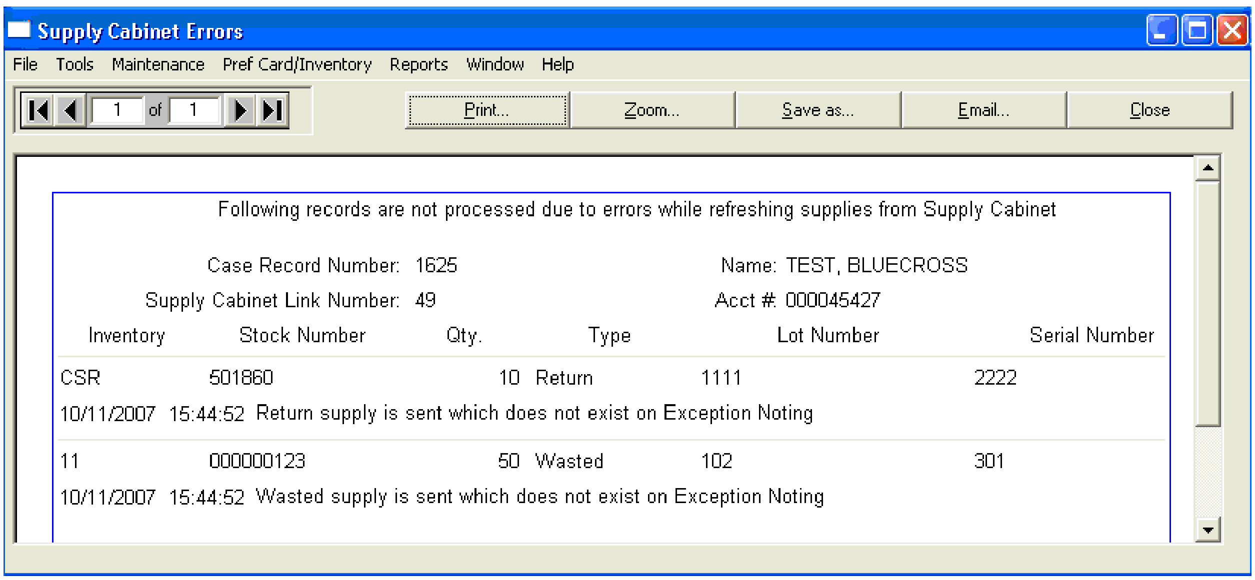
Error messages result from information sent by the supply cabinet to OR Manager that could not be processed into updates to the Exception Noting screen.

View and Handle Error Messages

1. You can view error messages by selecting View Supply Cabinet Errors in the right-click menu in the Exception Noting screen, as shown in the following graphic. This menu selection appears only when error messages exist. The focus must be under **Supplies** in the screen to display this menu selection.



The Supply Cabinet Errors screen opens.



2. Errors should be corrected by changing information in the supply cabinet to keep the two systems synchronized. The corrections needed are sent to OR Manager in the interface. Several types of messages appear in the Supply Cabinet Errors screen:
   - **Take**: Reports supplies taken from the supply cabinet that could not be processed.
   - **Return**: Reports supplies returned to the supply cabinet that do not match supplies pulled from it.
   - **Wasted**: Reports wasted supplies that do not match supplies pulled from the supply cabinet.
3. Clicking **Save** in the Exception Noting screen makes the errors part of the audit record. After an error is generated for the record, it can never be removed even if supplies are sent again from the cabinet with the correct quantity. The only exception possible is by overwriting a preference card, which deletes all errors. See *Overwrite Existing Supplies* on page 192 for general information on overwriting preference cards.

Completed Cases

Saving supply information in the Exception Noting screen and dealing with error messages for non-completed cases are tasks explained in the preceding sections. These tasks may also be needed for completed cases. Performing these tasks for completed cases requires identifying the cases that need work and opening the cases, as explained in the next section. Administrators grant permissions for opening completed cases.

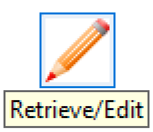
Picis recommends frequent evaluation of completed cases to avoid a backlog of unprocessed supplies and to insure the accuracy of the Preference Card Usage Report and the Cost Analysis Report.

Identify and Open Completed Cases

You can set a completed case's status to incomplete in order to process supplies, as described earlier in this chapter. The following steps explain how to work on completed cases without making such a status change.

1. If a completed case has unprocessed supply messages, a message appears at the bottom of the Exception Noting screen.
2. To process outstanding supply messages for completed cases, select **Tools > Process Supply Cabinet Data**.

   The Process Supply Cabinet Data screen appears. In the following graphic, the red arrow points to the descriptor <C>, which indicates that the screen allows you to specify only completed cases.
3. Enter selection values for the completed cases to search for. Enter search specifications in the same manner that you would in searching for other case records. *Search for Case Records on page 218*.
4. Click the **Retrieve/Edit** button.

   The Process Supply Cabinet Data screen appears with the cases that you specified, listed one per row.
5. (Optional.) Click the **Select Columns to Display** icon to reconfigure which columns and the order in which they are displayed.
6. Specify the case you want to work with selecting its check box. Three options are available:

- **View Unprocessed Supplies**: Displays a report screen that lists unprocessed supplies.
- **Process Supplies**: The software performs the operations for completing a case, such as adding the supply information into the case unless there is an error. A display shows the case record that is being processed.

- **View Errors**: Displays Supply Cabinet Errors screen for the completed case. See *View and Handle Error Messages* on page 337.

D

Appendix D: Privacy Settings

Privacy Message

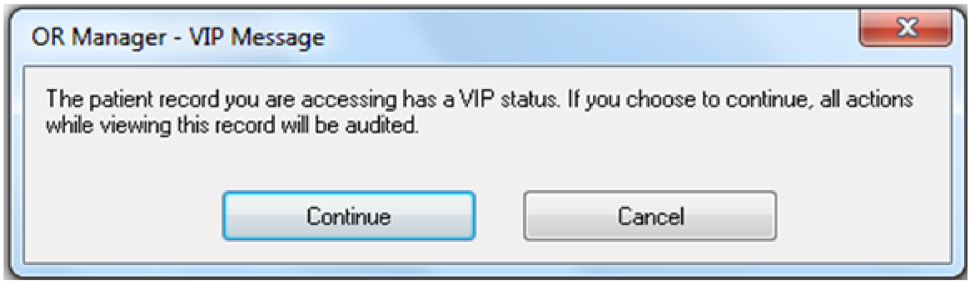
If a privacy message has been configured users see the message when signing on. If the Privacy Message is enabled, a privacy message appears in the OR Manager login screen. The message is configurable by the site. The message also appears on application timeout.

This Appendix discusses the behavior of the privacy features in OR Manager. For more information, see the *Security Manager User Guide*.

VIP Message

A user can designate a medical record as having VIP status. If VIP functionality has been configured, a message such as the following is shown when these records are accessed.

Note: The VIP screen displays only if a different user logs in after auto logoff.



Click **Continue** to close the screen and continue. This action creates an audit entry in the Patient Access Audit Report. Selecting **Cancel** terminates the action without creating an audit record.

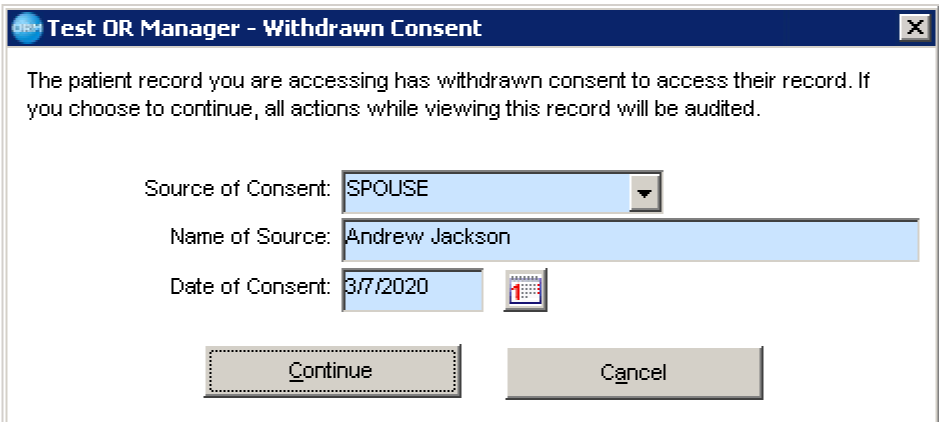
Note: The text in the message is configurable and the VIP warning you encounter may be different than the previous example.

Users with rights assigned by administrators can change the VIP status of medical records. Such a change creates an audit entry. VIP status exists at the patient level.

- If a medical record has VIP status, initiating certain actions on the record displays a VIP warning screen, and the user must make a selection to continue. Opting to continue in a VIP Message screen creates an audit record.
- If a patient record has VIP status, requesting to print it displays the VIP Message screen.

Withdrawn Consent Message

Patients can decide to restrict users from viewing their health related data which is referred to as *Withdrawn Consent*. In order to see withdrawn consent patient records, a user is required to provide evidence of consent approval, and may be required to enter the person who gave permission to view it; for example, the patient or any relative of the patient. This information is captured in the Withdrawn Consent message that appears before opening or editing a booking or case record in OR Manager, SmarTrack, or OR Manager for Web Access. The case record is accessible only after clicking **Continue** on the Withdrawn Consent message which creates and an audit entry.



The text that appears at the top of the message is configurable in Security Manager. See the *Security Manager Guide*.

Note: All fields must contain a value.

Source of consent: Values from the Source of Consent dictionary in OR Manager are listed in alphabetical order.

Name: Free text with a maximum length of 50 characters.

Date: Standard date control that defaults to current date but is editable.

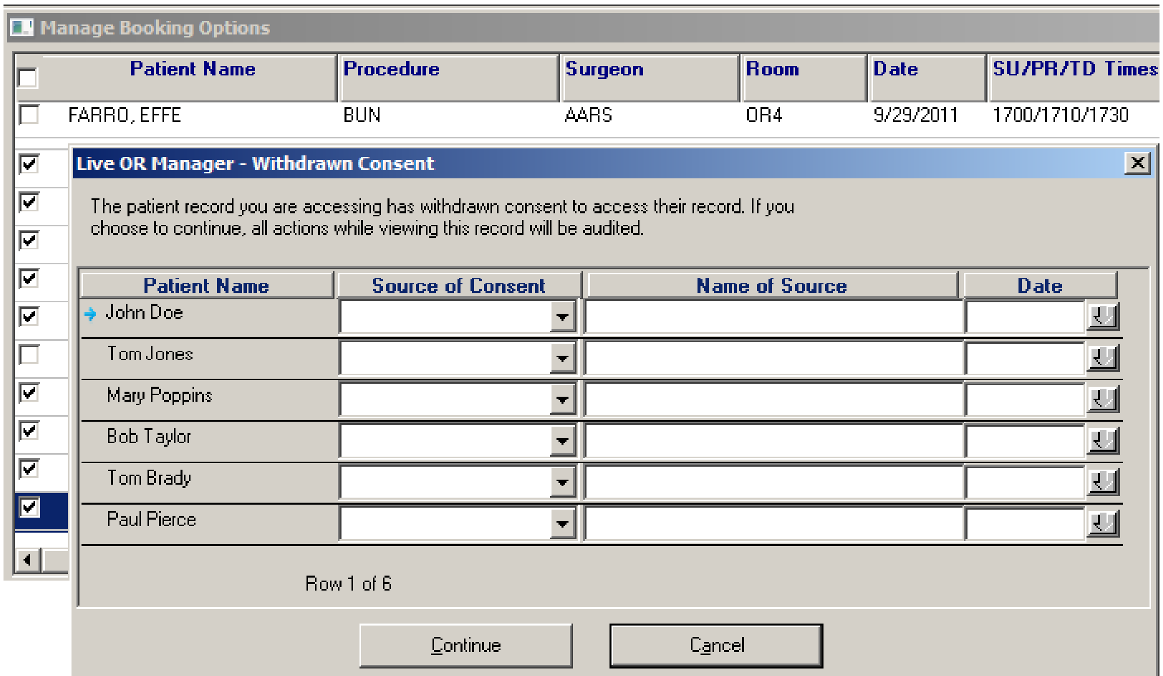
All the fields on the Withdrawn Consent screen are pre-populated if any user has already entered withdraw consent information for the same patient. This applies after a user opens a patient record from any workstation. It also applies while creating a new booking or case record.

Note: If no previous access to the patient's record exists, the date field is populated with today's date.

Printing

The Withdraw Consent message is displayed when case records or booking reports are printed. This includes standard reports, custom reports, external reports and PNDS forms for case records.

When printing multiple case records or bookings with withdrawn consent set to active, a screen displays all the selected withdrawn consent patients with the withdrawn consent information populated.



Field Level Audit Trail

The Field Level Audit Trail, which you can display in OR Manager, shows changes in the VIP status of records. The report also displays the audit information for the Patient Withdrawn Consent field.

Patient Access Audit Trail

The Patient Access Audit Trail, which you can display in Security Manager, shows audited incidents of access to records that had VIP and/or Withdrawn Consent status when the access occurred.

When a patient is both a VIP and a Withdrawn Consent patient, the Withdrawn Consent screen displays first. When the user clicks **Continue** the VIP message opens. Clicking **Continue** on the VIP message creates an audit for both Withdrawn Consent and VIP information. Clicking **Cancel** on either screen results in no audit record created and the user is not able to see any patient information.

The *OR Manager Configuration Guide* includes an appendix that discusses the Privacy Message, VIP, and Withdrawn Consent features in more detail relative to OR Manager, SmarTrack, Security Manager and OR Manager Web Access.

Index

Index