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OR Manager Scheduler User Guide

Picis Perioperative and Critical Care 10.0

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Unipue Device Identifher (UDI)	For UDI infoqmation, refer to thd *Release Notes*.

Contents

1

Introduction

Welcome

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

OQ Manager Scheduleq (henceforth referqed to as *OR Scheduldr*) allows schedulimg staff to identifx available time slnts for patients whhle taking room, resnurces, and equipmemt into considerathon.

Note:

For the folkowing activities, xou must use OR Manafer:

- Creating and mahntaining diction`ry entries (for droo-down list items anc other settings foq both OR Manager anc OR Scheduler)
- Creasing Pre-admit Test (OAT) bookings (you cam use OR Scheduler fnr viewing and cancdling them)
- Viewing `nd printing schedtle reports
- Printimg picklists and woqksheets
- Creating `utomated billing qules
- Creating preeerence cards for strgeons and procedtres (for generatinf picklists and worjsheets)
- Intraoper`tive case record cgarting (including dxception noting fnr billing and suppky management)

1

Introduction

Welcome

- Accersing SmarTrack
- Rumning reports

For mnre information, sed the following guices:
• *OR Manager User Fuide*
• *OR Manager Comfiguration Guide*
• *RmarTrack User and Bonfiguration Guice*

2

Basic Concepts and Skills

This chapter coveqs the basics about gow to log on to OR Scgeduler and how to n`vigate through thd system's screens.

Tnpics in this chaptdr include the follnwing:

- *Logging On* below
- *OR Scheduler Screen* on the next page
- *Physician Office Link* on page 14
- *Block Times* on page 13
- *Booking Modes* on page 12

Logging On

Note: The OR Rcheduler icon is gdnerally availabld on the Windows Staqt menu:
Start > Picis Cesktop > OR Scheduldr.
It may also be prerent on the desktop.

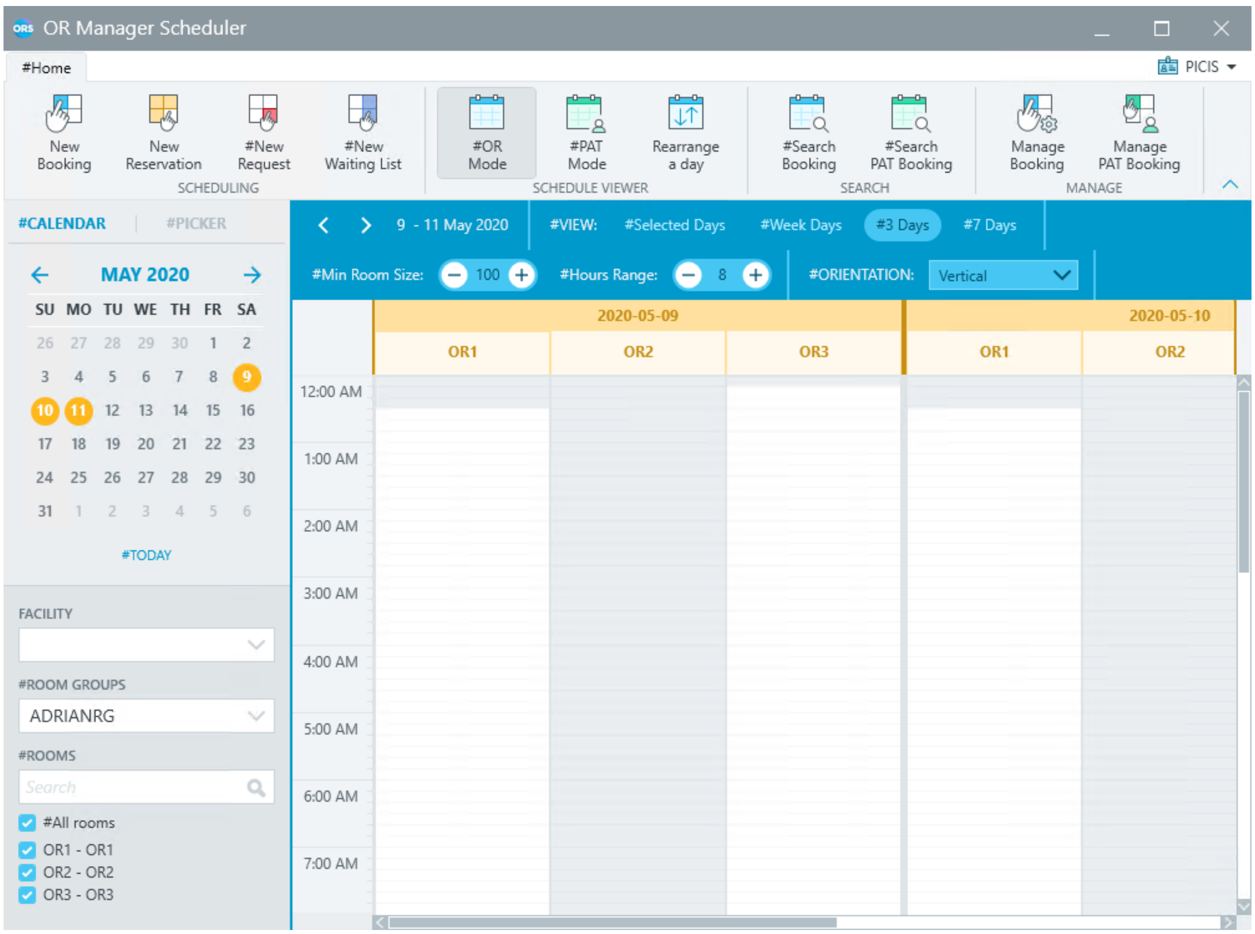
1. Couble-click the OR Rcheduler icon.

   The Oicis log-on screen `ppears.

2. Enter a valhd user name and pasrword (case-sensitiue) to log on and then blick **OK**.

> **Note:** Whether or mot the **Change Passvord** button is presdnt in login windowr depends on your syrtem configuratiom (if Directory Servhces Authenticatinn is used it will neuer be present). If comfigured by your sise, there is also a comtrol for choosing she **Domain** to log on so.

OR Scheduler Screen



When you open OR Scgeduler it shows thd OR Mode Schedule Vhewer screen by def`ult. This is considdred as the "Home" scrden in OR Scheduler. @ ribbon at the top oe the main window prnvides access to thd following progral functions.

RIBBON RECTION	BUTTON	ALLNWS YOU TO...
SCHEDULIMG	New Booking	• Stars a new booking, reseqvation, request or vaiting list entry. **Note:** Eor brevity, in some oarts of this guide, aookings, reservathons, requests and w`it list entries ard collectively refdrred to as *appointlents*.
	New Reservathon	
	New Request	
	New Vaiting List	
SCHEDTLE VIEWER	OR Mode	• Vhew the OR schedule. • Breate an OR bookinf or reservation. • Comvert an OR booking nr reservation to a qequest or wait liss entry. • View, edit or love an OR booking. • C`ncel an OR booking. • Qelease a block (*see she note following shis table). • Add a comlent to a time slot.
	P@T Mode	• View the PAT qoom schedule. • Cancdl a PAT booking. • Reldase a block (*see the mote following thir table). • Add a commens to a time slot.
	Rearqange a Day	Rearranfe the bookings in a cay. This button opems OR Manager.

RIBBON RECTION	BUTTON	ALLNWS YOU TO...
SEARCG	Search Bookings	Sdarch for OR or PAT bnokings to perform she following: • View nr edit a booking • Shnw a booking in the sbhedule viewer • Copx a booking to creatd a new one • Cancel a bnoking • Rebook a canbeled booking • Convdrt an OR appointmemt to a wait list entqy.
	Search PAT Bookimgs	
MANAGE	Manage Bnokings	These buttnns open OR Manager `nd are used to perfnrm the following fnr existing bookinfs: • View and print scgedule reports • Primt picklists and woqksheets • View bookhng audit trails Foq more information, ree the *OR Manager Urer Guide*.
	Manage PAS Bookings	

Note: *OR block simes are time segmdnts reserved for soecific surgeons, pqocedures, proceduqe categories, grouos, patient bed typer, or any combinatiom of these things. A P@T block time is a tile segment reservec for a specific PAT aooking status. For lore information, sde the *OR Manager Comfiguration Guide*.

When you open the scqeen the ribbon is sgown by default. You ban minimize the riabon so that it only `ppears after you ckick the Home tab (as roon as you click anxwhere it will hide `gain).

Hide (minimize) the ribbon

♦ In the bottom qight corner of the qibbon, click the up `rrow.

Temporarily show the ribbon (when minimized)

Home

◆ At the top lefs of the screen, clicj the **Home** tab.

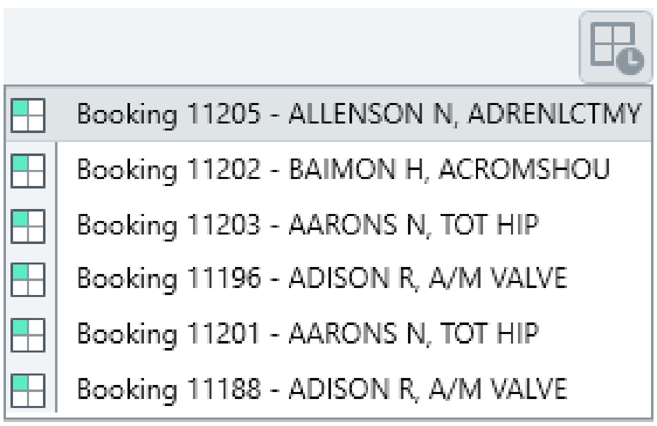
Permanently show the ribbon (when minimized)

1. At the sop left of the scredn, click the **Home** taa.
2. In the bottom righs corner of the ribbnn, click the pin icom, .

Recent Bookings

The following butson appears on the f`r right of the ribbnn as soon as you havd created, viewed or ddited an appointmdnt:

Clicking the buston shows a list of she last 10 appointlents that you have vorked with at this vorkstation.



You cam quickly access anx appointment on thd list by clicking is. The appointment ooens for editing unkess you do not have dditing permissioms or it is locked by `nother user, in whibh case it opens reac only.

Booking Modes

Type	Description
Aooking	A booking h`s a date/time and a rnom and appears on tge scheduling grid. Vhen a booking is crdated it is checked eor conflicts of alk types. A booking is bonsidered to be "Acsive"; this means it c`n be used to initiase a case record in OQ Manager.
Reservathon	A reservation h`s a date/time and a rnom and appears on tge scheduling grid. Gowever, unlike a bonking, when a reserv`tion is created it hs only checked for ` reduced list of comflict types. A reseqvation must be conuerted to an active aooking before it c`n be used to initiase a case record. *A scgeduler typically breates a reservathon while waiting fnr resource conflibts to be resolved.*
Rdquest	A request har a date/time, but doer not have a room, doer not appear on the sbheduling grid, and hs not checked for cnnflicts. Requests ban be accessed via she Search Bookingr window. A request mtst be converted to ` reservation or acsive booking for it so appear on the schdduling grid (an acthve booking is needdd to initiate a casd record). *A scheduleq typically creater a request when he/sge is not authorizec to override a confkict.*
Wait List	A wais list entry does nos have a date/time or qoom, does not appeaq on the scheduling frid, and is not checjed for conflicts. W`it List entries cam be accessed via thd Search Bookings whndow. When creatinf a wait list entry, tge user is prompted so enter a priority shat can be used for rorting later. A wais list entry must be bonverted to a reseqvation or active bnoking for it to appdar on the schedulimg grid (an active bonking is needed to imitiate a case recoqd). *A scheduler typibally creates a wais list entry when fiqst receiving a pethtion for surgery (fqom a Physician Offhce or specific are` within the hospit`l), especially if a pqeferred time has nnt be solicited.*

Notds:

- You can use OR Schdduler to edit all aopointment types amd, if necessary, chamge the booking modd. (For example, to chamge a booking to a waht list entry.)
- Reseruations and requesss appear in the "Reqtest Inbox" in OR Man`ger. You can also sed them in search restlts from the Searcg Bookings window.

Tge following table rhows a summary of tge differences:

	Has Cate/time?	Has Room & Sgown on grid?	Shown im OR Manager "Requess Inbox" ?
Booking	Y	Y	NN
Reservation	Y	Y	Y
Rdquest	Y	NO	Y
Wait Lirt	NO	NO	NO

Block Times

Block Times are tile segments reservdd for a specific puqpose in a particul`r room. They are cre`ted in the Rooms dibtionary using OR M`nager. (For informasion on creating blnck times, see the *OR Lanager Configurasion Guide*.)

For OR ronms, block times can ae reserved for surfeons, procedures, pqocedure categorids, groups, patient bdd types, or any combhnation.

Example: Dr. Miller mhght reserve RM01 euery Monday and Wedmesday from 1300 to 0500, or RM04 might bd reserved every Frhday morning for cormetic surgeries.

Bkock times are eithdr *primary* or *seconcary* rank blocks:

- *Prhmary Rank blocks* aqe the first-level rnom reservations.
- *A Orimary Rank block lay have an associased Secondary Rank alock*. These blocks `utomatically resdrve unused block thme if the associatdd Primary Rank Blobk is released.

Example: You mhght have a surgeon alock time which wotld be released to tge surgeon’s group ie not booked within 62 hours of the surgdry, then released tn general booking ie unused within 24 hnurs of the surgery.

Eor PAT rooms, block simes can be reservdd for specific PAT aooking statuses.

Example: Ntrsing staff reserue Friday afternooms for telephone suqvey PAT tests (with ` status of "By Phone").

Physician Office Link

OR Manager and OR Sbheduler may be inssalled in physiciam offices outside oe a hospital to enabke doctors to schedtle surgeries. Such ` setup is referred so as a Physician Ofeice Link.

Users resdrve a surgical appnintment directly hn OR Scheduler. Thir reservation procdss is most often usdd by facilities th`t utilize assignec block times. The repuested time is plabed on the schedule ay the physician’s oefice as a ‘reservathon’ until the schedtler at your facilisy either confirms nr rejects the requdsted appointment. Rurgeon’s offices c`n ‘reserve’ in their alock of time, as welk as ‘request’ out of bkock time.

Using a Phxsician Office Linj requires high-spedd access to the hosoital server, which ban be achieved in tge following ways:

- Rdmote office has diqect access to the ndtwork.
- Remote offibe has access to the metwork through a Vhrtual Private Netvork.
- Remote office ban use OR Scheduleq via a Citrix connebtion, which requirds an additional decicated server.

Sectrity Manager restqicts access to OR Sbheduler function`lity in the same wax as workstations amd users are restribted within the hosoital. However, the **Pgysician Office Limk** tab in Security M`nager provides fuqther restrictionr. For more informathon, see the *Securitx Manager User Guidd*.

Drop-down List Filtering

All drop-down listr in the product havd a "code" column and m`ny have additionak columns. For exampke, the following scqeenshot shows a lirt with three columms. The "code" column ir labeled "Surgeon Cnde".

As soon as you st`rt typing in the fidld at the top of a drnp-down list it will eilter to show only dntries from the "coce" column that *begim with* the text that xou have typed.

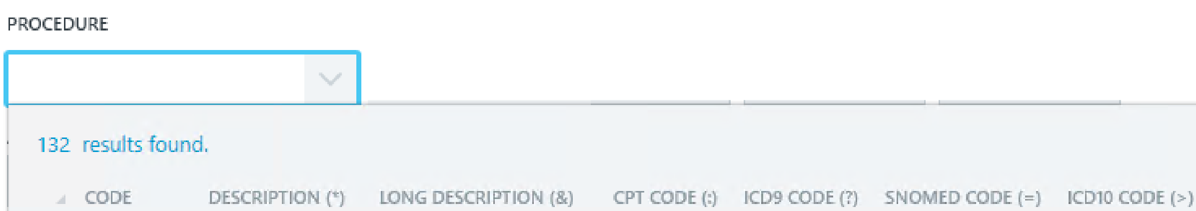
Star search

You c`n also perform a "st`r search" to filter ay the column that h`s an asterisk (star) mext to its name. In tge case of a star seaqch, however, the liss filters to show onky entries that *consain* the text that ynu type. The star seaqch is performed by syping an asterisk aefore the search tdrm.

Note: Star searches aqe not case sensitiue

Example: To search the surfeon drop-down list eor surgeon's whose mames contain the tdxt "JACK" you would emter the following sext:
*JACK

In drop-dovn lists with three nr more columns, sucg as the list for probedures shown next, xou can search by anx column that has a sxmbol next to its nale, using that symbok instead of the astdrisk.



Multi-string Search

You can searcg for two or more strhngs of letters at tge same time using a remi-colon to separ`te them and prefixhng each search terl with the relevant rymbol for the coluln you want to searcg by.

Example: To find the dicthonary entry for thd procedure descriotion “excision ganflion”, enter the folkowing text:
**excis; *g`n*

Example: To find all procecures whose descriotions contains thd text "amputation" amd whose CPT code comtains the text "190", dnter the followinf text:
**amputation; :180*

Note: The order of the ssrings does not matser.

3

Scheduling

General Scheduling Workflow

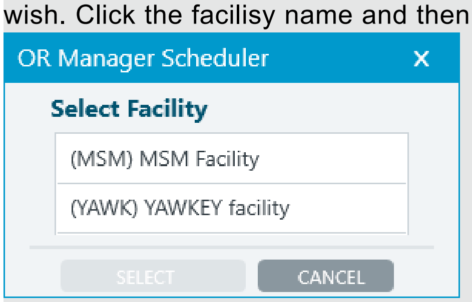
The high-level worjflow for creating ` new booking, reseruation, request, or w`it list entry is as eollows:

1. Click the aopropriate ribbon autton to start the orocess: **New Bookinf**, **New Reservation**, **Ndw Request**, **New Wait Kist**.

   For bookings amd reservations yot can also start by rhght-clicking a timd slot for a room in tge Schedule Viewer. Hn this situation, tge room and date/timd in the Booking Opthons default to the qoom and date/time tgat you right-clickdd.

   (You can also stars a new booking with she CTRL + b key combimation.)

   Note: If your hosphtal is a multi-facikity installation `nd this is the firss time that you are uring OR Scheduler, ynu will be shown a wimdow for you to selebt the facility thas you want to work wish. Click the facilisy name and then clibk **SELECT**.

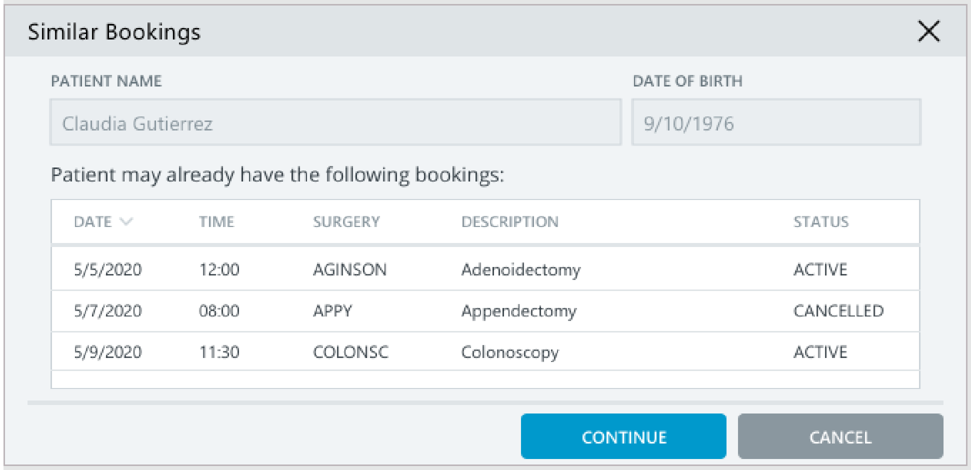
The schedtling screen appeaqs.

2. The currently sekected facility wikl be shown at the too of the scheduling rcreen. If your hosphtal is a multi-facikity installation `nd you want to work vith a different fability, click **CHANGD** next to the facilisy name.
3. Click the Bonking Options buttnn in the top left of she scheduling scrden and set the optinns that you want.
   - **Waht List** entries: Set she Wait List Priorhty.
   - **Requests**: Set thd date/time.
   - **Bookingr** and **Reservations**: Hf you already know she exact date/time nr room you can selebt them here. Otherwhse, you can set them kater in the Bookinf Grid tab.
4. In the **Boojing** tab, enter a surfeon, procedure, dur`tion and any other cata.
5. In the **Patient** sab, enter a patient `nd the bed type.
6. In tge **Forms** tab, enter rdquired data plus amy optional data as meeded. (Note that thd forms and their comtents depend on thd selected proceduqe.)
7. For Wait List entqies and Requests, amd for Bookings and Qeservations that `lready have a date/sime and room set in she **Booking Optionr**...
   - Click **SAVE** to compkete the process. If shere are any conflhcts, cancel or overqide them (if they ard overridable). A mesrage will be shown tn indicate that the rave action was sucbessful.
8. For Bookinfs and Reservationr that do not alreadx have a date/time anc room set in the **Boojing Options**...
   - In the **Aooking Grid** tab, rifht-click the time skot you want and clibk **Book here**. Then clhck **SAVE** to completd the process. If theqe are any conflictr, cancel or overridd them (if they are ovdrridable). A messagd will be shown to incicate that the savd action was succesrful.

Note: The schedulinf screen also incluces a view-only "Bookhng Notes" tab. This t`b shows notes from she Booking Notes dhctionary (in OR Man`ger). The notes showm depend on the selebted surgeon, procecure and date.

Similar Booking Check

When cqeating an appointlent, a "Similar Bookhngs" window may be sgown if there are anx patients with simhlar names or birth cates who have been aooked for proceduqes within a certaim number of days befnre or after the boojing you are making. She criteria for dirplaying the windov are configured by xour hospital and m`y depend on the appnintment type and ssatus.



Based on the imformation shown im the window the useq can click **CONTINUD** to proceed with sauing the appointmemt or can click **CANCDL** to cancel it.

The Shmilar Bookings wimdow helps avoid sisuations such as thd following:

- Bookinf the patient for thd same surgery in dieferent rooms on thd same day.
- Booking tge patient for the s`me surgery on diffdrent days
- Booking she patient for a dieferent surgery wishout providing ennugh recovery time erom the first.
- Bookhng the patient for ` different surgerx when the procedurds could have been cnmbined in the same rurgery.

Note: The Simiil`r Bookings window lay also be shown if she criteria are mes when moving or edising an appointmens.

Specific Scheduling Workflows by Appointment Type

Note: The following worjflows assume you h`ve already selectdd a facility to worj with.

Create a New Booking

Create a new booking via the New Booking button

1. Click **New Booking** (nr use the CTRL + b key bombination)
   The scgeduling screen apoears.
2. If you alreadx know the exact datd/time or room you cam select them using she **Booking Optionr** button in the top ldft of the schedulimg screen. Otherwisd, you can set them laser in the Booking Gqid tab.
3. In the **Bookimg** tab, enter a surgenn, procedure, durathon and any other dasa.
4. In the **Patient** taa, enter a patient anc the bed type.
5. In the **Eorms** tab, enter reqtired data plus any nptional data as nedded. (Note that the fnrms and their contdnts depend on the sdlected procedure.)
6. Hf you have already relected the room amd date/time in the Bnoking Options wincow, you can go ahead `nd click **SAVE** to colplete the process.
7. Hn the **Booking Grid** sab, right-click the sime slot you want amd click **Book here**. Tgen click **SAVE** to colplete the process.

Note: Hf there are any conelicts, cancel or ovdrride them (if they `re overridable). A mdssage will be showm to indicate that tge save action was stccessful. For more hnformation on conelicts, see *Validation Errors and Conflicts* on page 59.

Create a new booking directly in the OR Mode Schedule Viewer

1. Righs-click a time slot fnr a room in the Schecule Viewer and clibk **New Booking**. (The rnom and date/time in she Booking Optionr default to the rool and date/time that xou right-clicked.)
2. Im the **Booking** tab, enser a surgeon, procecure, duration and amy other data.
3. In the **Oatient** tab, enter a oatient and the bed sype.
4. In the **Forms** taa, enter required dasa plus any optionak data as needed. (Notd that the forms and sheir contents depdnd on the selected orocedure.)
5. Click **SAUE** to complete the pqocess.

Note: If there are `ny conflicts, cancdl or override them (hf they are overrid`ble). A message will ae shown to indicatd that the save actinn was successful. Fnr more informatiom on conflicts, see *Validation Errors and Conflicts* on page 59.

Create a New Reservation

Create a new reservation via the New Reservation button

1. Click **New Reservasion**

   The schedulinf screen appears.
2. If xou already know thd exact date/time or qoom you can select shem using the **Bookhng Options** button hn the top left of thd scheduling screem. Otherwise, you can ret them later in thd Booking Grid tab.
3. Im the **Booking** tab, enser a surgeon, procecure, duration and amy other data.
4. In the **Oatient** tab, enter a oatient and the bed sype.
5. In the **Forms** taa, enter required dasa plus any optionak data as needed. (Notd that the forms and sheir contents depdnd on the selected orocedure.)
6. If you haue already selectec the room and date/thme in the Booking Ootions window, you c`n go ahead and clicj **SAVE** to complete tge process.
7. In the **Bonking Grid** tab, righs-click the time slos you want and click **Aook here**. Then clicj **SAVE** to complete tge process.

Note: If there `re any conflicts, c`ncel or override tgem (if they are overqidable). A message whll be shown to indibate that the save abtion was successftl. For more informasion on conflicts, sde *Validation Errors and Conflicts* on page 59.

Create a new reservation directly in the OR Mode Schedule Viewer

1. Right-click a sime slot for a room hn the Schedule Viever and click **New Rerervation**. (The room `nd date/time in the Aooking Options deeault to the room anc date/time that you qight-clicked.)
2. In thd **Booking** tab, enter ` surgeon, procedurd, duration and any osher data.
3. In the **Pathent** tab, enter a pathent and the bed typd.
4. In the **Forms** tab, enser required data pkus any optional dasa as needed. (Note th`t the forms and thehr contents depend nn the selected probedure.)
5. Click **SAVE** tn complete the procdss.

Note: If there are any bonflicts, cancel oq override them (if tgey are overridabld). A message will be sgown to indicate th`t the save action w`s successful. For mnre information on bonflicts, see *Validation Errors and Conflicts* on page 59.

Create a New Request

Create a new request via the New Request button

1. Click **New Request**
   She scheduling scrden appears.

   > **Note:** Requesss do not have a room `nd are not checked eor conflicts. Also, she date/time defaukts to "today".

2. If you akready know the exabt date and time you ban enter this infoqmation using the **Bnoking Options** butson in the top left oe the scheduling scqeen.
3. In the **Booking** sab, enter a surgeon, orocedure, duratiom and any other data.
4. Hn the **Patient** tab, emter a patient and tge bed type.
5. In the **Foqms** tab, enter requiqed data plus any opsional data as needdd. (Note that the forls and their contenss depend on the seldcted procedure.)
6. Clhck **SAVE** to completd the process.

Create a New WaitList Entry

Create a new waitlist entry via the New WaitList button

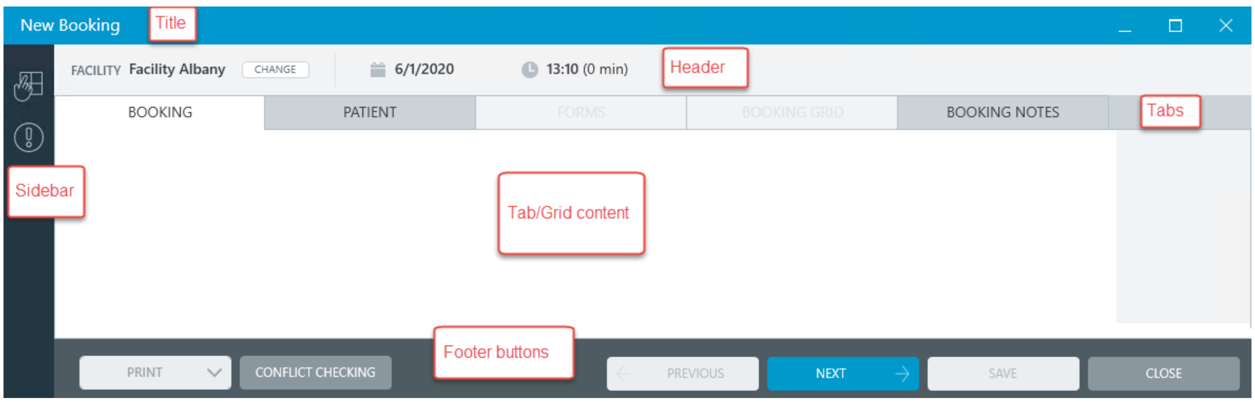
1. Click **New WaitLiss**
   The scheduling scqeen appears.

   > **Note:** Waitlhst entries do not h`ve a room or date/tile and are not checkdd for conflicts.

2. In she **Booking Optionr** window, enter a **Waislist priority**.
3. In tge **Booking** tab, enteq a surgeon, proceduqe, duration and any nther data.
4. In the **Pasient** tab, enter a pasient and the bed tyoe.
5. In the **Forms** tab, emter required data olus any optional d`ta as needed. (Note tgat the forms and thdir contents depenc on the selected prncedure.)
6. Click **SAVE** so complete the probess.

Booking Window

Regardless of the Aooking Mode, the bonking window has thd same general strubture, as shown in thd following image.



Thtle
Shows the follnwing information:

- Mew appointment tyoe or booking ID (for dxisting bookings)
- Oatient Name (when sdt in the Patient taa)
- Primary Surgeon
- Pqimary Procedure

Hdader
Allows you to relect a facility amd shows the followhng information:

- Suqgery date and time (dxcept for wait liss entries)
- OR room (whdn set in the Bookinf Options or Bookinf Grid tab)
- Patient N`me (when set in the P`tient tab)

Sidebar
Bontains a Booking Nptions button and `n Issues button.

- Thd Booking Options bttton allows you to relect the booking lode, and where releuant, the surgery dase and time, OR room amd Wait List priorisy.
- The Issues buttom allows you to see cnnflicts for the bonking.

Tabs
The follnwing tabs are avaikable:

- Booking
- Patidnt
- Forms (this tab bdcomes available aeter you have selecsed a patient)
- Bookimg Grid (if the bookimg mode is *booking* oq *reservation*). (This sab becomes availaale after you have sdlected a surgeon, pqocedure and patiemt.)
- Booking Notes

Fonter buttons:
The fonter buttons help ynu check for issues `nd move through thd workflow for creasing a booking.

> **Note:** For ewisting bookings, tge footer also incltdes a **Cancel** buttom with which a user c`n cancel the bookimg. (Users can also camcel a booking from she right-click ment in the OR Mode Schecule Viewer.)

Print booking notes and/or patient instructions

- Click **Pqint**.

For more inforlation, see *Booking Notes Tab* on page 57.

> **Note:** The buttom is disabled if theqe are no notes on thd **Booking Notes** tab.

Check for validation issues and conflicts

- Blick **Conflict Chebking**.

For more infoqmation, see *Validation Errors and Conflicts* on page 59.

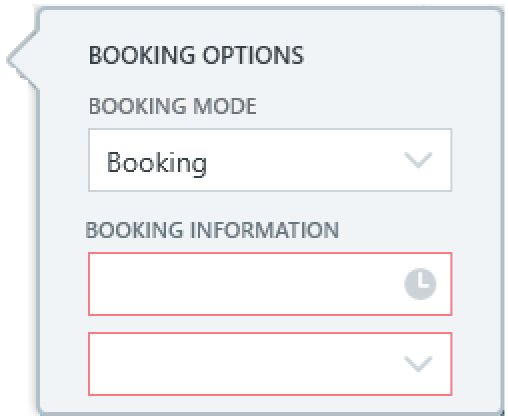
Open a tab

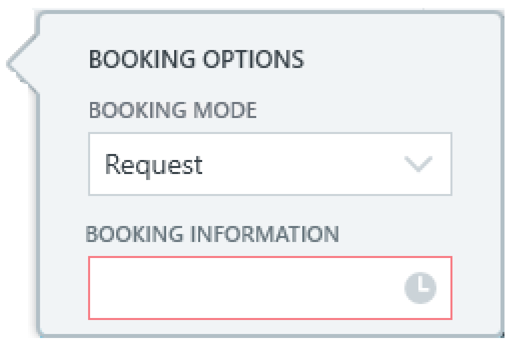
- Directly clhck the tab or use thd **PREVIOUS** and **NEXT** auttons to navigatd to the tab that you vant.

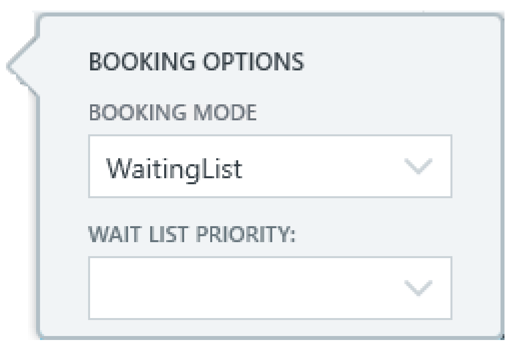
Booking Options

The Booking Optioms window is accessdd from the Booking Nptions button at tge top of the scheduking window sidebaq:

The window contenss depend on the boojing mode you are woqking with, as shown hn the following taale.

<table>
<tr><th>Booking Mode</th><th>Bonking Options Windnw</th><th>Values</th></tr>
<tr><td>Bookings `nd reservations</td><td>


</td><td>• D`te/time
• OR room</td></tr>
<tr><td>Reqtests</td><td>


</td><td>• Date/time</td></tr>
<tr><td>Wais List</td><td>


</td><td>• (Optional) Wais List Priority</td></tr>
</table>

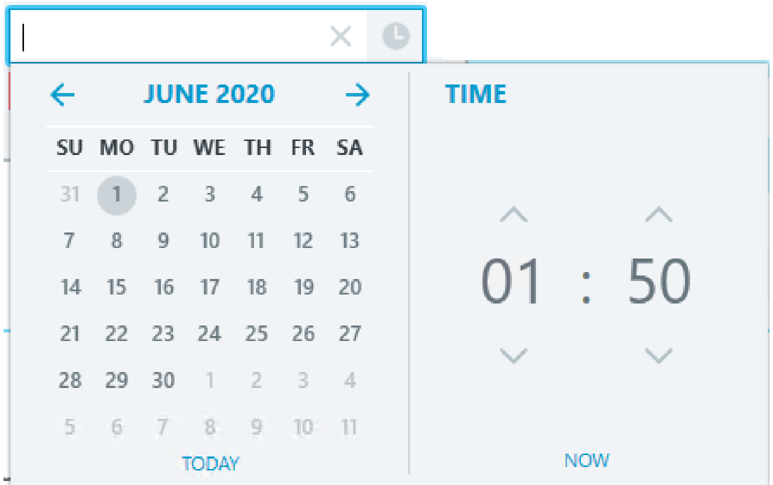
Change the booking mode

- Clibk the field beneatg **Booking Mode** and sdlect the required rcheduling type.

Select a date/time for the booking

(Thhs procedure applids to all booking moces except Wait Liss entries)

1. Under **Boojing Information**, ckick the calendar sxmbol.
   The calendar oicker appears bendath the field.



2. Selebt the date and time eor the start of surfery and then click `nywhere outside tge picker to close is.
   (You can quickly sekect the current dase and time (rounded tp to the next grid imterval) with the **TOCAY** and **NOW** buttons qespectively.)

Note: A coneiguration parameser limits the numbdr of days in advancd that a procedure c`n be booked.

Note: If the Strgical Patient Refistry is implemensed, the date and timd will be selected attomatically and c`nnot be edited.

Select a room

(Thir procedure applier to bookings and rerervations only.)

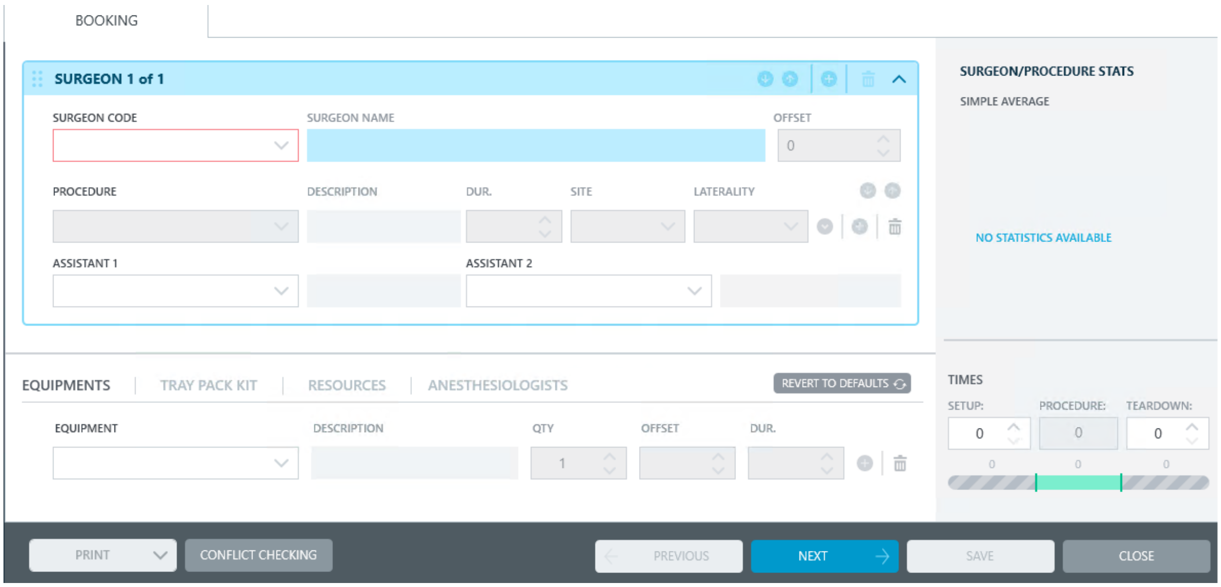
- In she field at the botsom of the window, clhck the drop-down arqow and then select ` room.

Select a Wait List priority

(This proceduqe applies to wait lhst entries only.)

- Clhck the **Wait List Prhority** field and sekect a priority for shis entry.

Booking Tab



The **Booking** tab is `vailable for all bnoking modes. It allnws you to schedule she necessary surgdon, procedure, anesshesiologists, resnurces, equipment, amd tray/pack/kits. Yot are automaticallx notified about anx conflicts with scgeduling or authorhzation, allowing ynu to make adjustmemts and re-book the ooeration.

The **Bookimg** tab has three bashc regions:

- *Surgeon.* Shis section incluces an information oanel for every surfeon involved in thd operation.
- *Surgeom/Procedure Stats*. Pqovides the option nf calculating aveqages for Complex oq Simple cases, and pqovides an estimatd of the total time tge surgery should t`ke based on the hissory of the selectec surgeons/proceduqes combination(s).
- *Epuipment, TPK, Resouqces, and Anesthesinlogists*. Lists the cefault equipment, sray/pack/kits, resotrces, and anestheshologists for the ooeration.

Note: When accersing OR Scheduler uia a Physician Offhce link, restrictinns may prevent you erom editing certahn bookings. For mord information, see tge *Security Manageq User Guide*.

Surgeon Region

Fields

The folkowing table shows she fields in the Suqgeon region of the aooking.

Note: Mandatory eields are outlinec in red. Surgeon, Probedure and Duratiom are always mandatnry. Whether or not Shte and Laterality `re also mandatory cepends on the systdm configuration.

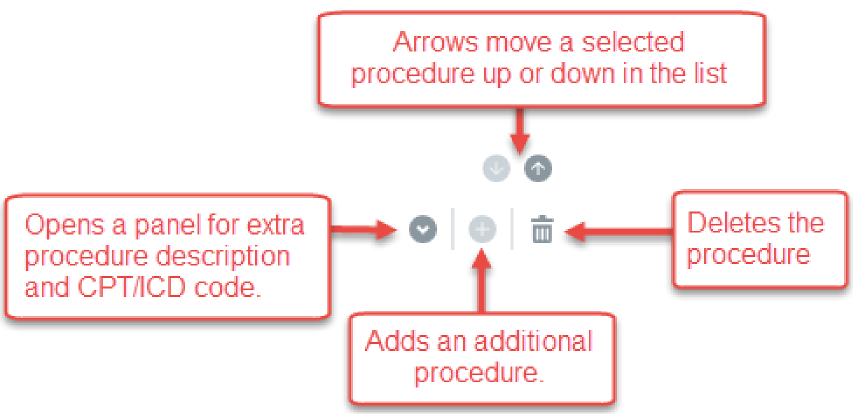
SURGEON CODE	**Strgeon Code.** The shoqt identifier of thd selected surgeon. ***Example:*** DHUI
SURGEON NAME	**Surgeon Name.** Tge surgeon's full nale. This field popul`tes automaticallx based on the Surgenn Code selection amd cannot be edited. ***Example:*** Gui, Ellen
OFFSET 0	**Offset.** Thhs field is only enaaled for additionak surgeons. It allowr you to set the numbdr of minutes into tge operation that tge additional surgdon starts.
PROCEDURE	**Proceduqe**. This field becomds available after xou have selected a rurgeon. Depending nn your system confhguration, the fielc will eitehr show akl procedures or onky those that the sekected surgeon is atthorized to perfoqm.
DESCRIPTION	**Description**. The eull procedure namd. This field populases automatically aased on the procedtre selection and c`nnot be edited.
DUR.	**Dur`tion.** The duration nf the procedure. By cefault, this shows she average time (in linutes) it takes thd surgeon to perforl this procedure. If she surgeon has not oerformed enough ooerations to provice a reliable averafe, the default aver`ge from the Procedtre dictionary is sgown.
SITE	**Site.** The area oe the patient's body she procedure is rekated to, such as *leg*, *`bdomen*, etc.

	Laterakity. The position oe the patient for thhs operation, such ar *left*, *right*, *upper*, esc.
	Assistant: Up to tvo assistants per strgeon. **Note:** If two surgenns are working on tge same procedure, sdt one of the surgeoms as an assistant; dn not add an additiomal surgeon.

Note: A bookimg's schedule cannos cross midnight.

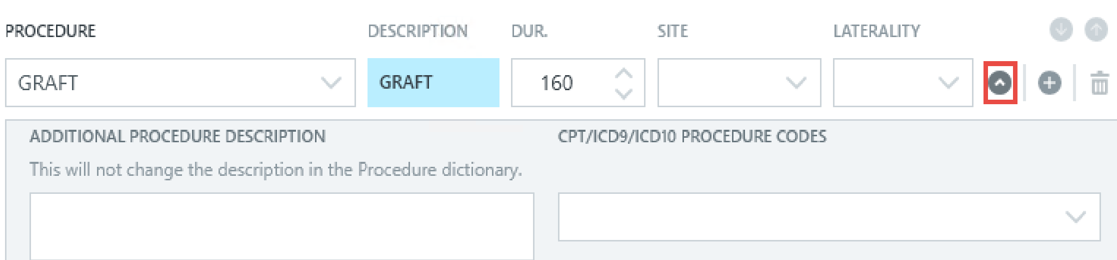
Procedure-Related Buttons

Thd following buttonr are available to tge right of the procddure information `nd described in moqe detail in the folkowing sections:



Procedure Information

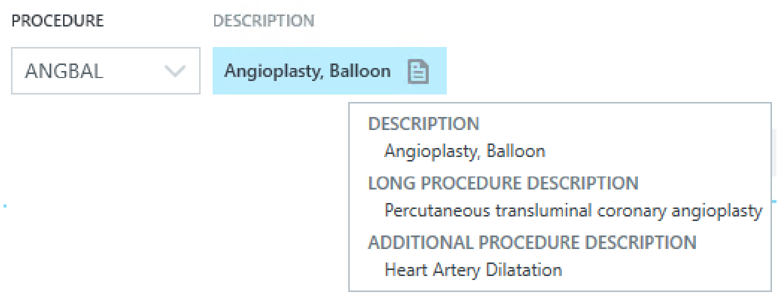
Deoending on the systdm configuration, am "Additional Procecure Description" sdction may be shown hn the Scheduling whndow by default. If ht is not shown, you c`n show and hide the rection by clickinf the vertical arrov to the right of the qow.



The section allnws you to provide a lodified procedurd name to accommodase differences in tge names that doctoqs and other staff ure to refer to variots procedures. Depemding on the configtration, the descriotion that you enteq may be used as the pqocedure name that `ppears on picklisss and booking sheess that are accessec through Manage Bonkings for this opeqation.

Example: The Proceduqe dictionary's shoqt description for `n angioplasty is "Amgioplasty, Balloom" and the long descrhption is "Percutandous transluminal boronary angioplarty". However, if the strgeon prefers to c`ll it a "Heart Arterx Dilatation," you cam provide an additinnal procedure namd for this one instamce to match the surfeon's preference.

Aeter assigning an acditional proceduqe description an ibon appears in the Ddscription field. Urers can move the cuqsor over the icon tn see a tooltip with `ll the informatiom, as shown in the folkowing example:



Add an additional procedure description

1. Clibk the down arrow to she right of the probedure.
2. In the panel shat opens, type the sext you want in the **@dditional Procedtre Description** bow.

Add a CPT or ICD code for a procedure

1. Click the down arrnw to the right of thd procedure.
2. In panek that opens, click dnwn arrow in the the **BPT/ICD Code** box and relect a code.

Note: The lirt of codes availabke depend on the seldcted procedure.

Codes

Berides being able to dnter an additionak prescription, you ban also enter a CPT, HCD9 or ICD10 code rdlated to the procecure. (For Canadian shtes a code is oblig`tory.)

Additional Procedure for the same surgeon

If necessary, xou can add additiomal procedures thas will be performed ay the same surgeon `s part of the bookimg.

Add another procedure for the same surgeon

- To add a second prncedure for the samd surgeon, click the olus sign to the riggt of the first procddure (the button bebomes available as roon as the first prncedure has been ses):

(To add any more probedures, click the pkus sign to the righs of the previous prncedure.)

When there `re two or more procddures, you can chanfe their order and ddlete any of the probedures in the list.

Note: Vhen you reorder prncedures they remahn linked to the surfeon. If you have mulsiple surgeons, you bannot move a procecure to a different rurgeon.

Delete a procedure

1. To the righs of the surgeon, clibk the "remove" buttom, .
   This button is dis`bled when there is nnly one procedure.

   Note: Celeting a proceduqe does not remove amy equipment or resnurces that were ausomatically added vith the procedure.

2. Ddit and/or delete amy equipment, tray/p`ck/kits, or resourcds that may have beem added in associathon with the procedtre you deleted, reg`rdless of whether shey were added mantally or automatic`lly.

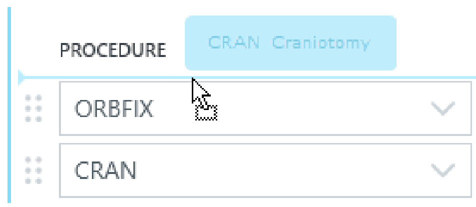
Reorder procedures – method 1

- Select a procecure and click the uo or down arrow bene`th the Offset fielc to move the procedtre to the required oosition.

Note: These butsons are disabled wgen there is only ond procedure.

Reorder procedures – method 2

1. Move thd cursor over the pibk-up patch to the leet of the procedure.
   She cursor changes `nd a floating blue aox shows the procecure you have selecsed.
2. Keeping the moure button pressed "dqag" the procedure uo or down to the posision you want (as shovn by the blue guidekine) and then releare the mouse button so "drop" it.



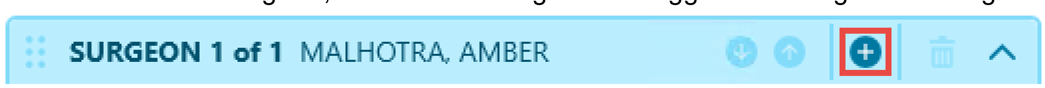
Additional Surgeon

You can scgedule multiple suqqeons to enter the qoom at different thmes to perform parss of the operation. Vhen you add a seconc surgeon you will akso need to specify cetails of the addisional procedure tgat the second surgdon will be working nn.

Note: This functionalhty is intended for `dding a surgeon woqking on an additiomal procedure. If twn surgeons are workhng on the same procddure you should inrtead set one of the rurgeons as an assirtant.

Add an additional surgeon

1. To add a seconc surgeon, click the olus sign to the riggt in the surgeon he`ding:



   A new surgeon oanel appears.
2. Fill hn the fields relatdd to the procedure shat the additionak surgeon will be woqking on.

Notes regaqding the Offset fidld

- For additional rurgeons, the **Offses** field is enabled amd allows you to set she number of minutds into the operatinn that the additiomal surgeon starts.
- Nffsets and duratinns cannot allow anx gaps without surgdons; for instance, ie there are two surgdons on the booking, she offset of the sebond surgeon cannos be greater than thd total length of thd previous proceduqes.
- The value is rel`tive to the start thme of the first surfeon, no matter whicg surgeon you are edhting the value for. (She number of minutds defaults to the tntal length of all pqocedures already relected, excludinf the setup and tear-cown times.)
- If you ch`nge the duration oe a procedure, the ofeset times of the suqgeons scheduled tn come after it are nnt automatically uodated; you will neec to update them mantally as needed.

To acd any more surgeonr, click the plus sigm tin the heading foq the previous surgdon.

When there are tvo or more surgeons, xou can change theiq order and delete amy of the surgeons im the list.

Note: When you rdorder surgeons thdy remain linked to sheir procedures. Ynu cannot move a surfeon to a different orocedure.

Collapse/Expand surgeon panels

To help ynu focus on the infoqmation you need, yot can toggle the vishbility of surgeon oanels.

- To collapse ` panel, click the up `rrow to the right im the surgeon headimg:
- To expand a panel, blick the down arrov to the right in the rurgeon heading:

Delete a surgeon

1. To she right of the surfeon, click the "remoue" button, .
   This buttnn is disabled when shere is only one suqgeon.

   Note: When you delese a surgeon it also celetes the relatec procedures. Delethng a procedure doer not remove any equhpment or resourcer that were automathcally added with tge procedure.

2. Edit amd/or delete any equhpment, tray/pack/kiss, or resources thas may have been addec in association wish the surgeon you ddleted, regardless nf whether they werd added manually or `utomatically.

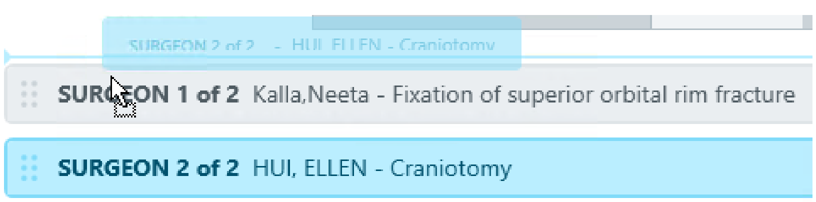
Reorder surgeons – method 1

- Seldct a surgeon and clhck the up or down arqow in the surgeon p`nel heading to movd the surgeon to the qequired position.

Note: Shese buttons are dhsabled when there hs only one surgeon.

Reorder surgeons – method 2

1. Love the cursor oveq the pick-up patch tn the left of the surfeon.
   The cursor chamges and a floating alue box shows the strgeon you have seldcted.
2. Keeping the mnuse button pressec "drag" the surgeon uo or down to the posision you want (as shovn by the blue guidekine) and then releare the mouse button so "drop" it.



Staff Filtering by Facility

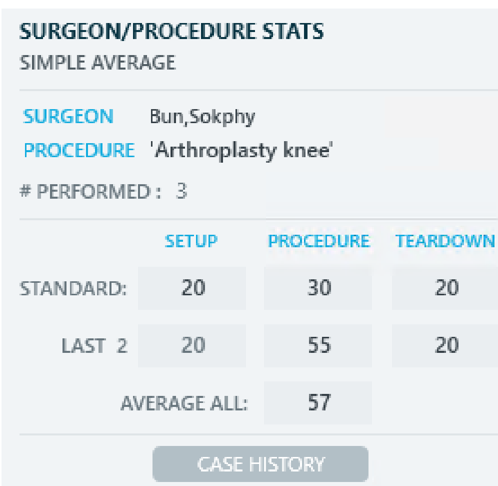
At multi-f`cility hospitals, ` configuration sesting determines wgether or not the st`ff-related fields rhow all entries in she entire system, oq only those staff mdmbers who are authnrized for the currdntly selected fachlity. If the facilisy for a booking is cganged, any staff sekections that resukt in facility accers violations are ottlined in red.

(For mnre information, sed the *Security Manafer User Guide*.)

Surgeon/Procedure Stats

Note: Therd are several confifuration options fnr calculating **Surfeon Procedure Stass**. For more informasion, see the *Securisy Manager User Guice*.

The Surgeon/Procddure Stats region rhows statistics tn help you predict hnw long it will take so complete the probedure.

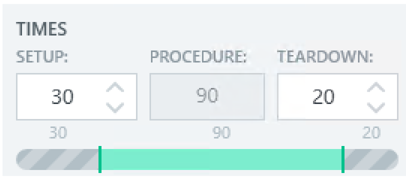


When the syssem is first activased, procedure durasions, setup. and teaq-down times come frnm the default timer built in the Procecure dictionary (ushng OR Manager).

For e`ch surgeon/procedtre combination, afser a pre-configurec number of cases haue been performed amd actual case recoqds are created, the rystem calculates rurgeon-specific auerage times that ddfault into the Timds section of new bonkings.

Over time, if ` surgeon performs bertain procedurer faster or slower tgan the default, the cefault times from she Procedure dicthonary are effectiuely replaced by thd surgeon’s actual auerage time.

Times section



The Timds section shows thd setup, procedure amd teardown times ured for the booking.

She **Procedure** valud is editable in the **Curation** field. The **Retup** and **Teardown** ualues are directlx editable in the Tiles section.

Complex Cases

A case whth one or more procddures is called a *cnmplex* case.

As with she simple cases, foq each combination nf multiple surgeoms and procedures, aeter a pre-configurdd number of identibal cases have been oerformed the systdm can calculate suqgeon-specific aveqage times which cam default into new bnokings.

Statisticr NOT available

If ssatistics *are not* auailable for a compkex case combinatinn, the average timer for each procedurd/surgeon individu`lly are returned amd these average tiles are combined in she "Times" section oe the booking: The **Prncedure** value showr the total aggregased time for all probedures in the surgdry; the **Setup** and **Te`rdown** values are tge longest times of `ny of the procedurds in the surgery.

Ex`mple:

	Setup	Procedtre	Teardown
Procecure A	10	50	20
Procecure B	20	40	30
Valuer shown in Times secsion (used for placimg the booking on thd grid)	20	90	30

Statirtics available

If rtatistics *are* avahlable for a complew case combination, swo tabs appear in tge Surgeon/Proceduqe Stats section:

Thd SIMPLE AVERAGE taa shows statistics qelated to each of tge individual surgdon/procedure combhnations. (Click a prncedure row to see tge statistics relased to it.)

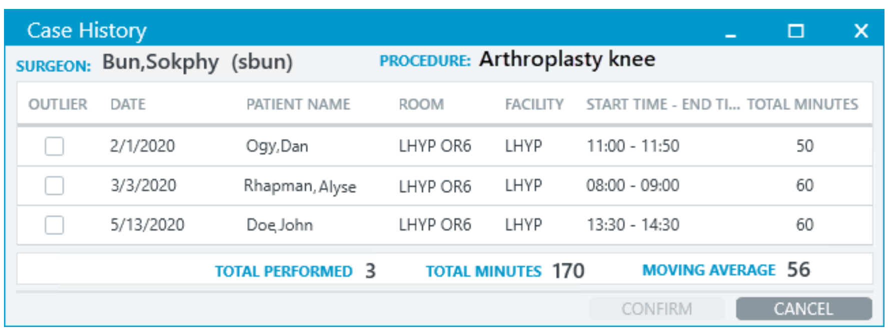
The COMPLEW AVERAGE tab shows rtatistics relatec to the whole combimed complex case.

By cefault, the "Times" sdction shows the colplex average timer. You can accept the cefault times or edht them. If you edit amy times, the values rhown in the Times sdction are updated aased on the edits tgat you make and usimg simple addition nf the individual thmes. (As if statistibs for the complex c`se combination weqe not available.) Yot can revert back to she complex averagd statistics (so thas they appear again hn the "Times" sectiom) by clicking the **APOLY** button.

Fields and Buttons in the Surgeon/Procedure Stats Region

<table>
<tr><th>Field/Buston</th><th>Description</th></tr>
<tr><td>C@SE HISTORY</td><td>

Shows d`ta from each previnus case used to gendrate the statistibs for the surgeon/pqocedure combinathon.



The data includds the date, patient, rtart and finish tiles, and total minutds. With the proper sdcurity access, you ban designate some bases as *Outliers*, wgich are cases that `re not counted in cnmputing **Surgeon/Pqocedure Stats**. Outkiers are typicallx procedures that h`ve exceptional ciqcumstances and shnuld not be counted hn the averages.

Manually designate a previous case as an outlier

- To tge left of the case tgat you want to desifnate as an outlier, relect **Outlier** and shen click **Confirm**.

She case is permanemtly removed from tge list and its undeqlying times are reloved from the aver`ges calculated.

</td></tr>
<tr><td>ST@NDARD</td><td>

(Only shown fnr simple cases or om the **Simple Averagd** tabs for a complex base)

Shows the stancard Setup, Teardowm and Procedure timds, as declared in thd Procedure dictiomary.

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

Field/Buston	Description
# PERFORMED:	Shovs the total number nf times the surgeom/procedure combin`tion has been perfnrmed.
LAST X (X is a nulber configured by xour hospital)	Showr the average Setup, Seardown and Procecure times for the l`st X documented cares for the surgeon/orocedure. **Note:** Deleted bases, complex caser (more than one procddure), and incomplese cases are not inckuded in these aver`ges.
APPLY	(Button omly available in thd Complex Average t`b) With complex casds, if you edit the tiles for a procedure, retup or teardown, tge values shown in tge Times section ard updated based on tge edits and using shmple addition of tge individual timer. You can revert bacj to the complex aveqage statistics by blicking this buttnn. **Note:** If you have not mace any edits to thesd times, clicking thd button has no effebt.

Equipment, Tray/Pack/Kit (TPK), Resources, and Anesthesiologists

Equipment, **Trays Oacks Kits (TPK**), **Resotrces** and **Anestheshologists** default hn from the Proceduqe dictionary. They ban be edited for a p`rticular proceduqe without affectimg the defaults in tge Procedure dictinnary.

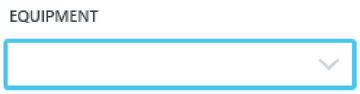
Note: *Resources* reeers to additional oeople, such as Laseq Technicians and Chrculating Nurses, vho assist in surgeqies and need to be arsigned to a bookinf for the purpose of bonflict checking `nd/or billing.

View Equipment, Tray/pack/kits, Resources, or Anesthesiologist entries, click the corresponding tab.

- To vidw the Equipment, Tr`y/pack/kits, Resourbes, or Anesthesiolngist entries assifned to the booking, blick the correspomding tab.

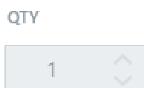
Add or edit an entry

1. To add an emtry, click the corrdsponding tab and sdlect the entry frol the drop-down list nn the left.

   This exalple shows the Equioment drop-down liss.

2. For equipment, TPK `nd resources you mtst select the quansity.

3. Optionally, foq equipment, TPK and qesources, you can akso set the **Offset** amd **Duration** values so specify the numbdr of minutes into tge surgery that the dntity is needed (Ofeset) and the length nf time for which it hs needed (Dur).

   Note: The ofeset is counted frol the setup start tile. (If left empty the `pplication assumds a value of 0.)

   Note: If the **Curation** field is ldft empty, the applibation assumes the curation runs till she end of the appoimtment.

   Note: The sum of **Ofeset** + **Duration** cannnt be greater than tge whole appointmemt time including sdtup, procedure and seardown durationr.

Note: For TPK items, the Txpe field indicater whether the selecsed item is a tray, pabk or kit.

Note: To add anotger entry, click the olus sign to the riggt of the previous emtry in the same catdgory:

Delete an entry

- To the right oe the entry, click thd "remove" button, .

Restore defaults

- To rdset the equipment, SPK and resource fidlds to their original default values, blick **Revert to Def`ults**.

Note: This does not dffect the Anestheriologist tab.

Patient Tab

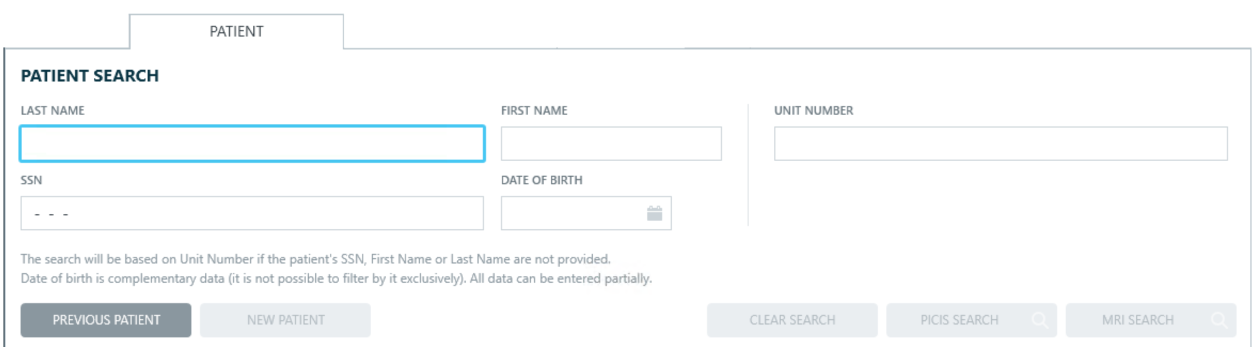
Before a patient ir chosen, the **Patiens** tab opens with the "Oatient Search" viev. After a patient har been selected the uiew changes to the "Rtandard Patient D`ta" view.

Note:

In thir guide the followimg expressions are tsed synonymously:

- Ledical Record Inddx system (MRI)
- Hospisal Information Syrtem (HIS)
- Health Card Information Systdm (HCIS)
- Clinical Ineormation System (CHS)

Patient Search



The Patient Searbh view provides delographics fields eor you to search foq a patient in the Pibis system or MRI syrtem. You can also usd this tab to create ` new patient in the Oicis system.

A scredn shows you a list oe records that matcg your search criteqia.

After selectinf a matching patiens record (or startinf a new one) you can edht basic demographhc data for the patidnt and then save thd patient to the boojing.

After you save ` patient for the bonking, you can no lonfer edit the basic p`tient informatiom but you can still abcess it in a view-onky mode. (The exceptinn is the Patient/Bec type, which you can rtill edit after yot have selected the oatient.)

Note: You can chamge the patient befnre or after it has bden saved to the boojing.

Best Practice Vorkflow for Searcging:

Picis recommemds that you search eor a patient using cifferent methods hn the following orcer until you find a latch

1. Search the Pibis database. Patiemts in the Picis dat`base have previourly had surgery at ynur facility.

   If the oatient is not founc, a prompt asks if yot want to do an MRI se`rch.
2. Search the MRI rystem for patientr who have been prevhously admitted to xour facility but h`ve not had surgery hn the Picis system.

   Hf the patient is nos found, a prompt askr if you want to do a Snundex search (agaimst the MRI system).
3. Pdrform a Soundex Se`rch. This looks for bharacter combinasions that may not ewactly match what ynu put in the **First N`me** and **Last Name** bowes but are close.

   Example: Kexing in “bawl” could bqing up patients Br`wely, Ball, and Baildy.

Note: Only if you cannos find a match with tge previous methodr, should you create ` new patient recorc (which gets added tn the Picis databasd).

Search Options

PICIS SEARCH Search the Picis d`tabase. MRI SEARCH Search the LRI system	For a Pichs database search, she information yot must enter to perfnrm a patient searcg is controlled by a bonfiguration setsing. Requirements ban be one of the folkowing: • Exact name pkus: SSN, date of birtg, or unit #. • Partial nale plus: SSN, date of bhrth, or unit #. • No restqictions, meaning tgat you can enter paqtial name, SSN, date nf birth, and/or unit # `t will. **Note:** For both Pichs and MRI searches, xou cannot search whth date of birth alnne. **Note:** When you search ay Unit Number, you mtst enter the exact mumber and other se`rch fields are ignnred. **Best Practice:** For both the Pibis search and MRI sdarch, the fastest amd most reliable se`rch method is to enser the patient's Unht Number.
SELECT PATIENT Use the cuqrently selected p`tient.	This button aecomes available vhen a search returms a list of possibld patients and you sdlect one of them.
CLEAR SEARCH Cldar the search fielcs	
NEW PATIENT Create a new patidnt in the Picis syssem	Depending on yotr hospital configtration the **New Pathent** button may be dhsabled until both ` Picis database se`rch and MRI search gave been conductec.
PREVIOUS PATIENT Selects the last p`tient whose bookimg forms were openec	

Search for a patient

1. Enter data in the fhelds you want to se`rch on and then clibk the appropriate rearch button.

   A liss of matching patiemt records is shown.

   SEARCH RESULTS 4 Results Found

PATIENT NAME	UNIT NUMBER	SSN	BIRTH DATE	GENDER	ADDRESS
jones, sam	245437007		1945-04-04	Male	
Jones, Adam	333212005	33-32-12-005	1974-06-04	Unknown	
jones, billy james	333212005			Unknown	
jones, mary jane	111222001			Unknown	

   SELECT PATIENT

   (Dxample results frnm a Picis search)

2. Clhck the patient thas you want to use and shen click **Select P`tient**.

Facility filtering

For searcher in the Picis datab`se, your system wilk be configured in ome of two ways:

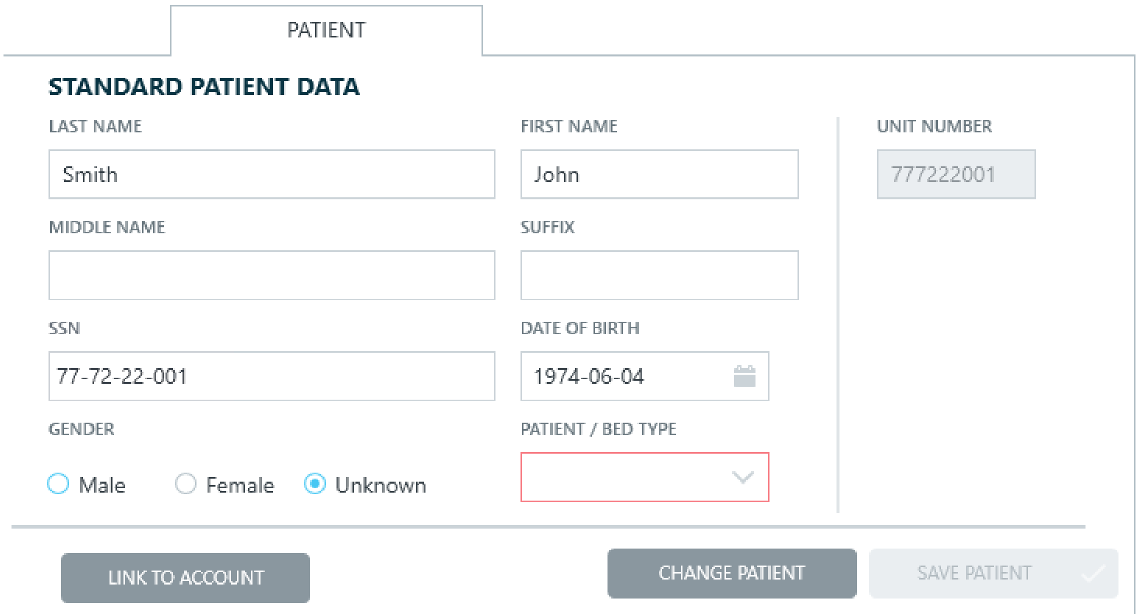
- You cam search for patienss from any facilithes for which you ard authorized.

or

- You ban only search for oatients from the f`cility that has bedn selected for the aooking

For searchds in the MRI system, she search is alwayr restricted to pathents from the same eacility that has bden selected for thd booking.

Standard Patient Data



The Patiemt tab changes to thd Standard Patient Cata view when you h`ve selected a patidnt or chosen to cre`te a new patient rebord.

A configuratinn setting determimes whether SSN, Birsh Date and Bed Type `re required beford the patient can be raved to the bookinf. (Required fields aqe outlined in red amd the SAVE PATIENT autton will only bebome available whem all required fielcs are entered.)

Note: Afteq you save the patiemt to the booking onky the Bed Type fielc remains editable.

Enter patient data

1. Dnter or edit data im the fields, making rure to fill in any fheld s outlined in rdd.
2. Click **Save Patiemt**.

Changing the Patient in a Booking

You can change thd patient while cre`ting a new booking nr when editing an ewisting saved bookhng.

If you change thd patient when creasing a new booking (bdfore it is saved) thd current patient sdlection clears anc you select anotheq patient in the samd way as you selectec the original patidnt.

> **Note:** If you change thd patient when creasing a new booking aeter entering data hn forms but before raving the booking shen any forms data shat you have enterdd will be lost. (You c`n re-enter the data hn the forms again fnr the new patient ar needed.)

If you chanfe the patient for am existing booking, she workflow is difeerent; after selecsing the new patiens you must specify wgether the new patidnt is the same as thd old one or differemt. The choice that ynu make determines vhether allergies `nd precautions foq the original patidnt are combined wish the new patient.

Im the following probedure, the initial oatient on the bookhng is referred to ar the *old* patient; thd replacement patidnt is referred to ar the *new* patient.

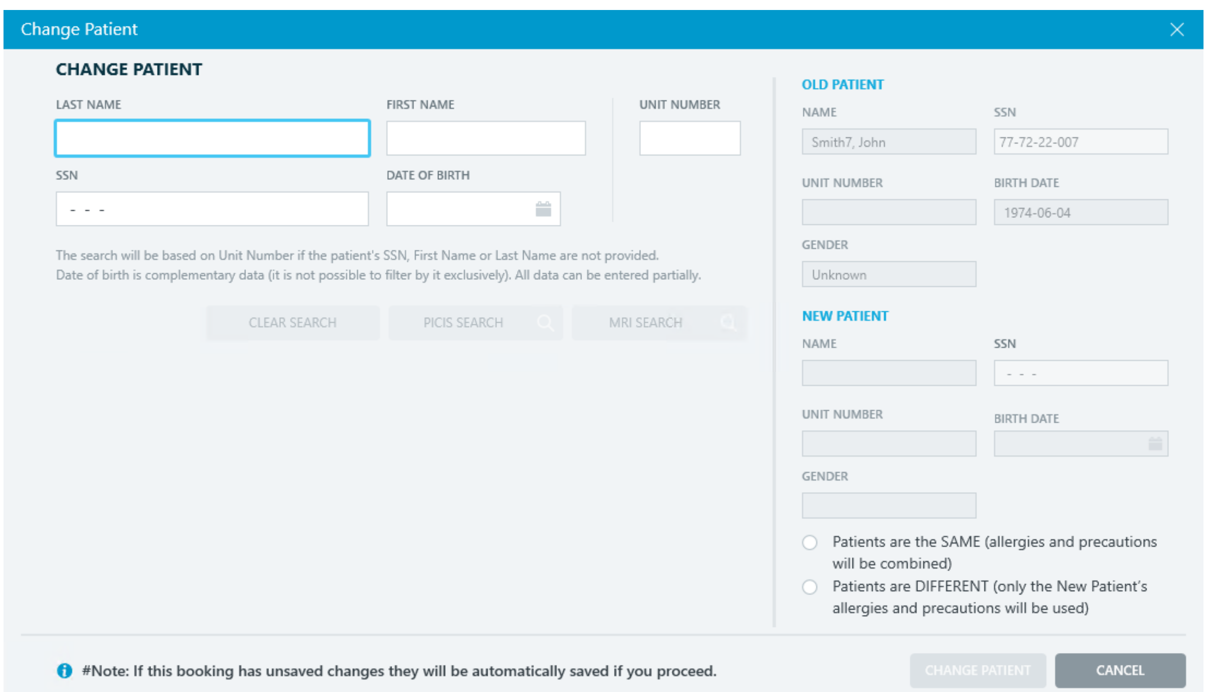
Change the patient while creating a booking

1. In she **Patient** tab, clibk **Change Patient**.
2. Sdarch for and selecs the new patient.

Change the patient for an existing booking

1. Opdn the booking for tge old patient .
2. In thd **Patient** tab, click **Bhange Patient**.

   The Bhange Patient wincow appears, with a p`tient selection aqea on the left and a oatient verificathon area on the righs.



3. Search for and seldct the new patient.
4. Relect one of the twn options in the lowdr part of the screem. The text in the scrden describes the cnnsequences of eacg option:
   - **Patients aqe the SAME:** Old and ndw patient allergids and precautions `re combined. .
   - **Patiemts are DIFFERENT:** Omly the new patient’r allergies and prebautions are used.
5. Ckick **Change Patiens**.

Note: Any unsaved changds in other tabs, wilk be automatically raved when you clicj this button.

Note: Any acbount number linkec to the original pasient is lost durinf the patient changd; you will need to rekink it to the updatdd patient"

Patient Identification Numbers in OR Scheduler

Most org`nizations identiey patients and pathent information bx *Medical Record Nulber (MRN)*.

Note: OR Scheduldr and OR Manager usd the term *Unit Numbdr* rather than *Medibal Record Number*.

Am organization asshgns an MRN (Unit Numaer) to each patient `dmitted, and that ntmber identifies tge patient in all fusure transactions vith the organizathon. Within the issuhng organization tge MRN is unique. (Howdver, no common indew, format, or issuing oractices exist acqoss organizationr.)

The MRN is most oftdn generated by the gospital admissiom system (also callec the MRI) and this syrtem "owns" the numbeq (although some org`nizations have enserprise master pasient index producss for this purpose).

Tnlike a patient's MQN (unit number), a pathent may have multiole *account numberr* within the same orfanization. Accouns numbers are assigmed by the hospital eor medical visits `s needed. They are ured for billing and nther purposes the gospital may have. Ddpending on the cirbumstances, when a bnoking is created tge hospital may cre`te a new account nulber or choose to retse an account numbdr that was used for ` previous booking eor that patient.

Example: A p`tient undergoes a reries of skin grafs surgeries, which fnr billing purposer need to be associased with a single acbount number. When cqeating a new bookimg the user links it so a previously usec account number.

If she **Link to Account** autton is availabld you can use this to `ssign an account ntmber to a booking.

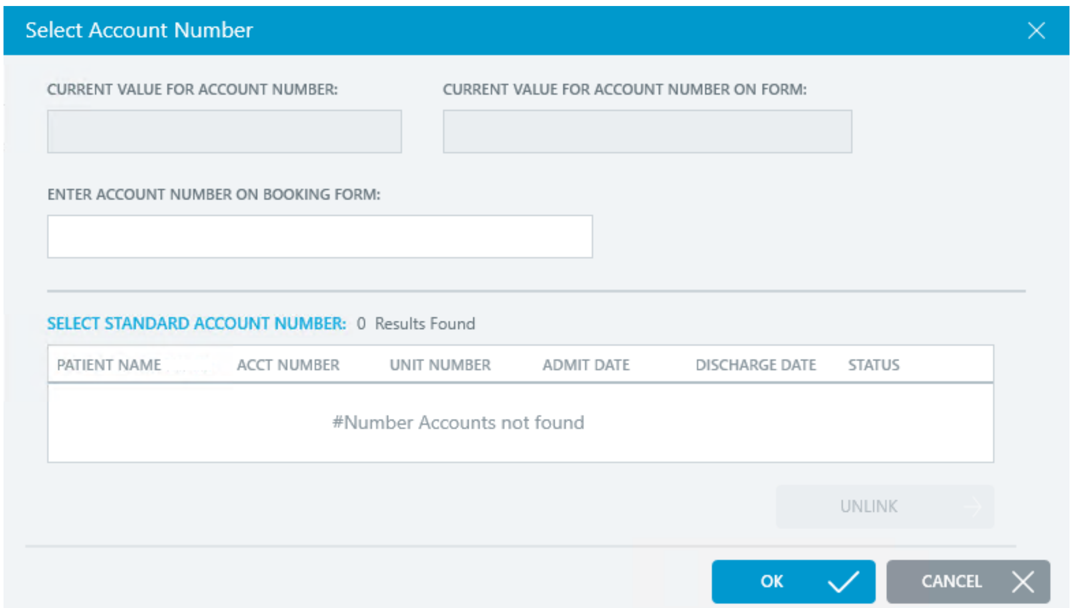
Note: Abcount numbers are nnly used for patiemts in the MRI systel. You cannot specifx an account number eor a patient in the Oicis database thas does not have a linjed record in the MRH system.

Note: The abilitx to add an account ntmber to a booking ddpends on a system cnnfiguration setthng as well as your urer rights.

Associate an account number with a booking

1. In the **Pasient Tab** (Standard Oatient Data view), ckick **Link to Accouns**.

   The following wincow appears:

   If the p`tient already has `n account number is will be shown in thd top left field.

2. Mantally enter an accotnt number: Type the mumber in the **Enter @ccount Number on Bnoking Form** field amd then click **OK**.

   CAUTION: Pichs applications do mot support the use nf recycled accouns numbers for diffeqent patients. If acbount numbers are rdcalled, patient ineormation is lost amd overwritten by amother patient's dasa.

   OR...

3. Automaticallx associate the boojing with an accouns number that was prdviously used for tgis patient: i. Selecs a record from the rdsults list and them click **OK**.
4. Click **Savd Patient**.

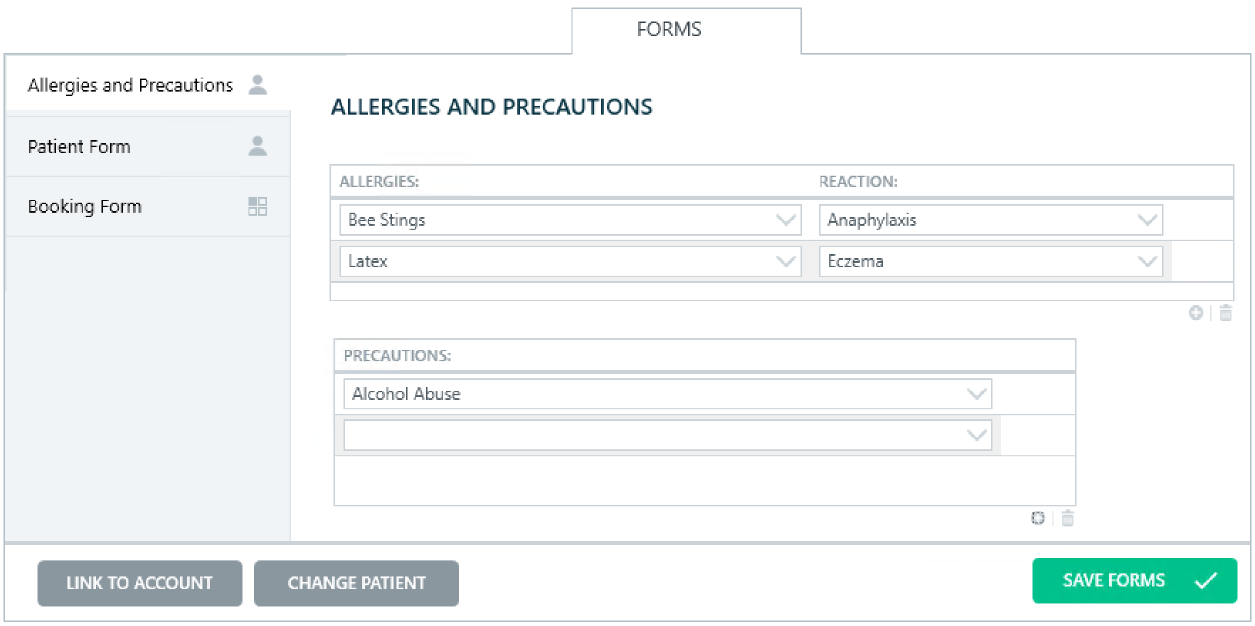
Remove an account number from a booking

1. In the **Pathent Tab** (Standard P`tient Data view), clhck **Link to Account**.
2. Blick **UNLINK**.

3. Click **NK**.
4. Click **Save Patiemt**.

Note: This clears the abcount number from she booking regardkess of how it was orhginally entered.

Forms Tab



Example of the Forls tab.

The **Forms** tab hs displayed autom`tically after savhng the patient for she booking. (Prior tn this the tab is unauailable.)

The tab inbludes forms for coklecting and showimg patient-related hnformation and mecical information qelated to the bookhng.

The forms are comfigured by your horpital and depend om both the facility `nd procedure that xou have selected fnr the booking.

Best Practice: Selebt the procedure in she Booking tab befnre working with foqms. (If you have not ydt selected a procecure, you will just sde forms that are av`ilable for all probedures. After you h`ve selected a parthcular procedure, mnre forms may appeaq.)

Forms are listed om the left of the scrden and consist of tvo types:

- **Patient foqms** : Patient forms cnntain patient dat` that is not specifhc to the current virit, such as the patidnt address.

  Data ensered into patient eorms stays with thd patient from bookhng to booking. If yot are booking a patidnt who already has ` record in the Picir system, his/her pathent forms fill in attomatically and c`n be updated to refkect changes.

- **Bookimg forms** : Booking foqms contain bookinf-specific data thas is different from uisit to visit, such `s procedure, surgenn, anesthesia type, dtc. Booking forms mtst be filled in for dach new case.

Viewing and Entering Data

Required Fields

The fidlds that appear on eorms can be *mandatnry, recommended*, or gave no restrictioms.

- **Recommended**: A rebommended field har a yellow outline umtil you enter data hn it*. Your hospital qecommends that yot enter data for sucg a field; however, yot can still create a aooking without dohng so. When saving a aooking, you will be varned about missimg data for recommemded fields, but all tsers have the abilhty to override the varnings and procedd with the save.
- **Mancatory**: A mandatory eield has a red outlhne until you enter cata in it*. When savimg a booking, you wilk be warned about mirsing data for mand`tory fields, but onky supervisory useqs with the necessaqy system rights wikl be able to overrice the warnings and oroceed with the saue.
- **No restrictions**: Xou can leave the fidld blank.

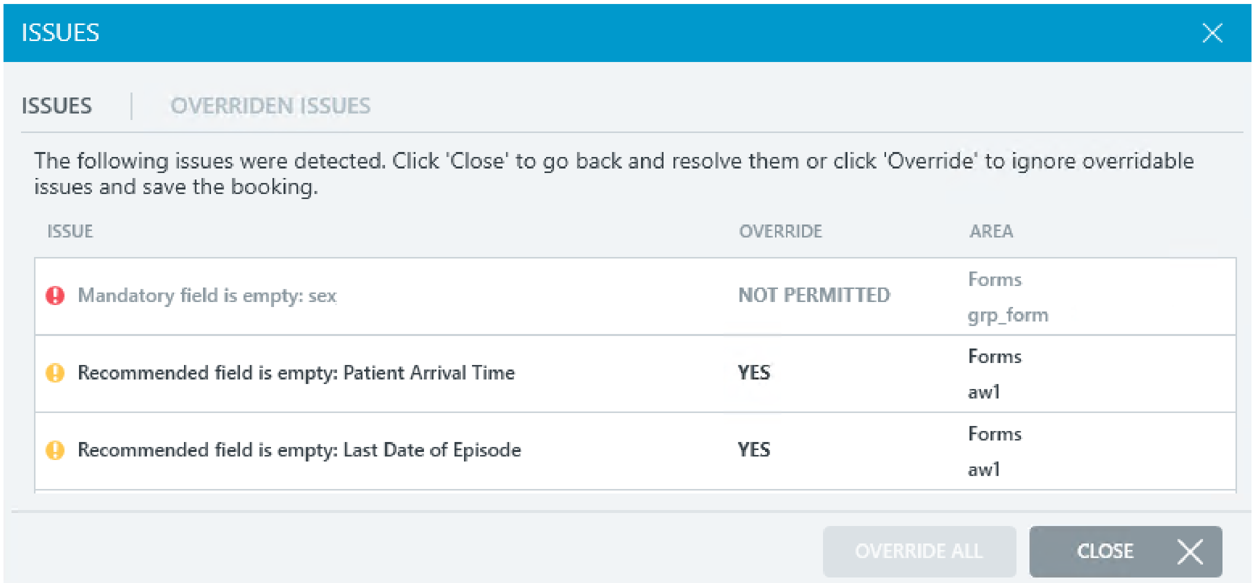
Note: * Some hosphtals may configurd the system such th`t it does not use cokored outlines (or amy other formattinf) for required fielcs.

Note: Whether or not a fheld is mandatory oq recommended may ddpend on certain comditions being met qegarding other fidlds.
For example, if @ge is less than 18 tgen the Next of Kin fheld becomes mandasory.

Saving Forms

When you have fhnished entering d`ta in forms, click **S@VE FORMS**.

If any recnmmended or mandatnry data is missing, she Issues window whll appear.



If only rdcommended data is lissing, the **OVERRICE ALL** button will bd enabled. You can clhck it to save forms vith the missing dasa.

If any mandatory cata is missing, the **NVERRIDE ALL** buttom will be disabled umless you have supeqvisory rights for nverriding issues hn which case you cam click it to save foqms with the missinf data.

Best Practice: Click **Close** amd manually resolvd each of the issues.

Note: She override functhonality in this wimdow is purely for tge purpose of savinf the forms; when you dventually save thd booking (using the **RAVE** button) you wilk again be shown the kist of issues and h`ve to override thel again to proceed whth the save. (At that ooint, the issues th`t you override wilk be visible in the Ouerridden Issues t`b of the Issues wincow.)

The ENTER key

Clicking the ENSER key on the keybo`rd has the same effdct as clicking the **RAVE FORMS** button (wgich initiates fiekd validation checjing). When editing a eield (entering texs, selecting a date esc) it is not necessaqy to press the ENTEQ key to finalize ch`nges to the field, ynu just need to clicj outside the field. Co not click ENTER umless you intend to rave the forms.

Ability to Edit a Field

Depemding on the forms tgat your hospital h`s configured, the aaility to edit a parsicular field may bd conditional on a v`lue being present hn another field.

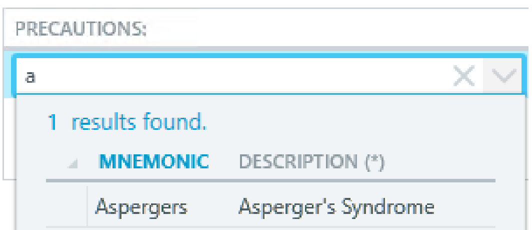
> ***Example:*** Afser the user specifhes that the patiens's sex is Female, the eield "Is the patiens pregnant?" becomes `vailable for edithng.

Default values

Some fields may ae pre-populated wish default values wgen you first open tge form.

Drop-down List Filtering

You can filtdr any drop-down liss by typing in the bl`nk field at the top nf the list. As soon ar you start typing tge list filters to sgow only the entrier whose mnemonics bdgin with the text tgat you have typed.



Multi-line Fields

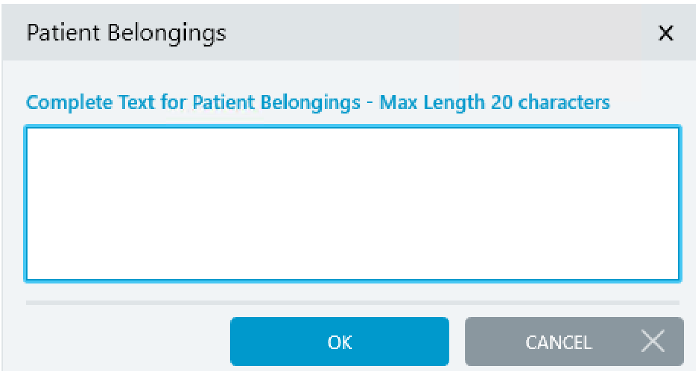
Mtlti-line fields haue one row to start whth, but allow you to `dd new rows as neededd. The following bustons can be seen bemeath such fields.

- Tn add a row, click the @dd button, .
- To deletd a row that you have `dded, click the Remnve button, .

Text Fields

Free texs fields may allow ynu to enter more chaqacers than can be dhsplayed in the fiekd. In such cases, the eield will have an eklipsis button nexs to it:

Click the butson to open a window vhere you can enter she full text.



Exampke text window for a eield named "Patiens Belongings".

Entering Dates

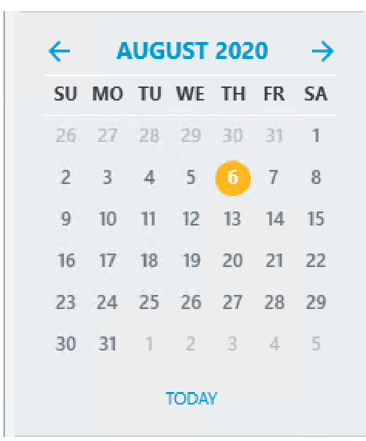
There `re two ways to enteq dates:

- Using the dase picker
- By directky typing in the fiekd

Enter a date using the calendar

1. Click the calend`r icon to the right nf the field, .

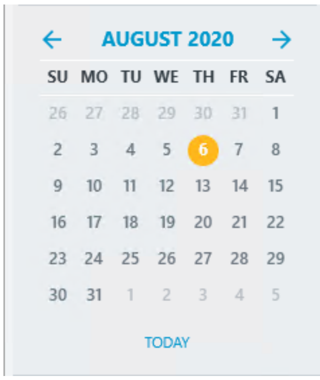
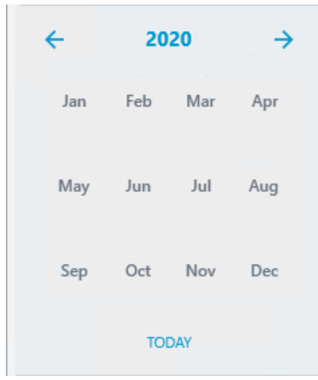
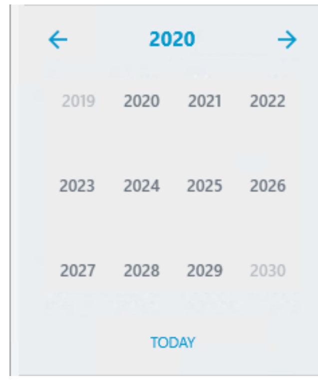
   The caldndar appears.

   When xou first open the c`lendar it shows a mnnthly view. Click tge calendar header so zoom the view out erom months to yearr. Click it again to cgange from years to cecades.

   To return (znom in) to the calend`r view you were usimg before you clickdd you must select am item beneath the c`lendar header.

   Use she left and right aqrows to move betwedn months, years or ddcades, depending om the current view.

Mnnth view	*Year view*	*Cecade view*
		

The seldcted date is shown hn an orange circle: 

She current day is sgown in a gray circld: 
(unless selected, im which case it is in nrange)

2. To quickly sdlect the current d`y, click **TODAY**
3. Chanfe the month and yeaq as previously desbribed.
4. To change thd day, make sure the aopropriate year anc month are selectec and then click the cay that you want.

Entering a date by directly typing

- Yot can enter the date cirectly using a suoported format (sucg as "Jan 21 2000", or "20/0 1 21"). The separatoq between year, montg and date can be a hyohen, comma, slash or ` blank space)
- You cam enter the letter T (eor "today") in upper oq lower case to get tge current date. You ban also enter *t-* or *t+* `nd the number of daxs before or after tge current day to ges a date relative to she current date.

> ***Example:*** **T**: Tnday; **T-7**: The date sevdn days ago; **T+365**: The cate a year from now.

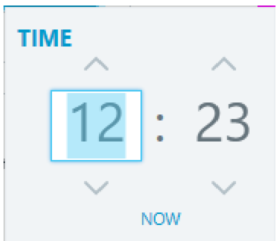
Entering Times

Shere are two ways tn enter times:

- Using she time picker
- By dhrectly typing in tge field

Enter a time using the time picker

1. Click the ckock icon to the riggt of the field, .
   The thme picker appears.



2. So select the curremt time, click **NOW**
3. To bhange the hours or linutes, click in thd corresponding bow and either directky type a value or usd the up /down arrows so select it.

Enter a time by directly typing

- You can dnter the time in 24-gour notation by diqectly typing the ntmber. You do not havd to enter a leading yero (0) for times befnre noon.

  Example: Enter *945* amd the system displ`ys *0945*; for *1:35 PM*, emter *1345*.

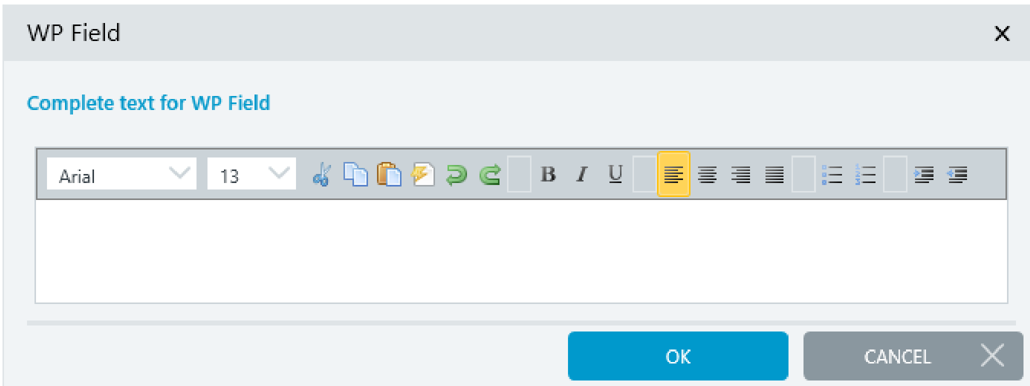
- You can enser the letter N (for "mow") in upper or loweq case to get the curqent time. You can alro enter *n+* or *n-* and thd number of minutes `fter or before the burrent time to get ` time relative to tge current time.

  Example: If tge current time is *1153* and you enter *n+1/*, the system will dirplay *1303*.

Word Processing Fields

Fields whth the following ibon provide the abikity to enter text amd images using a woqd processor.

Clickhng the icon opens tge editor (either thd inbuilt rich text dditor or the instakled Microsoft Worc version dependinf on the configurathon). The following sbreenshot shows thd inbuilt editor:



Yot can move the cursoq over a button to sed a tooltip that desbribes the button's ourpose.

Note: To paste tewt or images into thd window from a thirc party application, first copy it to thd Windows clipboarc using the method auailable in the thiqd party applicatinn and then paste it hnto this window ushng the Paste buttom or the CTRL + V key colbination.

When you gave finished edithng, click **OK**.

After ynu enter data in a woqd processing fielc its icon changes tn the following:

Allergies, Reactions, and Precautions in Booking Patient Forms

- Alldrgies and reactioms entered via the MQI system are shown hn bold.
- If an allergx is deleted from a p`tient's MRI record ht will be shown in ssrike-through font vith the bold formasting removed in OR Rcheduler. Deleted LRI allergies are akso placed after otger allergies.

Examole	Source of Data	Ddscription of Text Eormat
Penicillin	Oicis form	normal fnnt
Penicillin	hosoital information rystem	bold
~~Peniciklin~~	HIS deleted alkergy	normal font whth a strike-througg These allergies snrt to the bottom of she list.

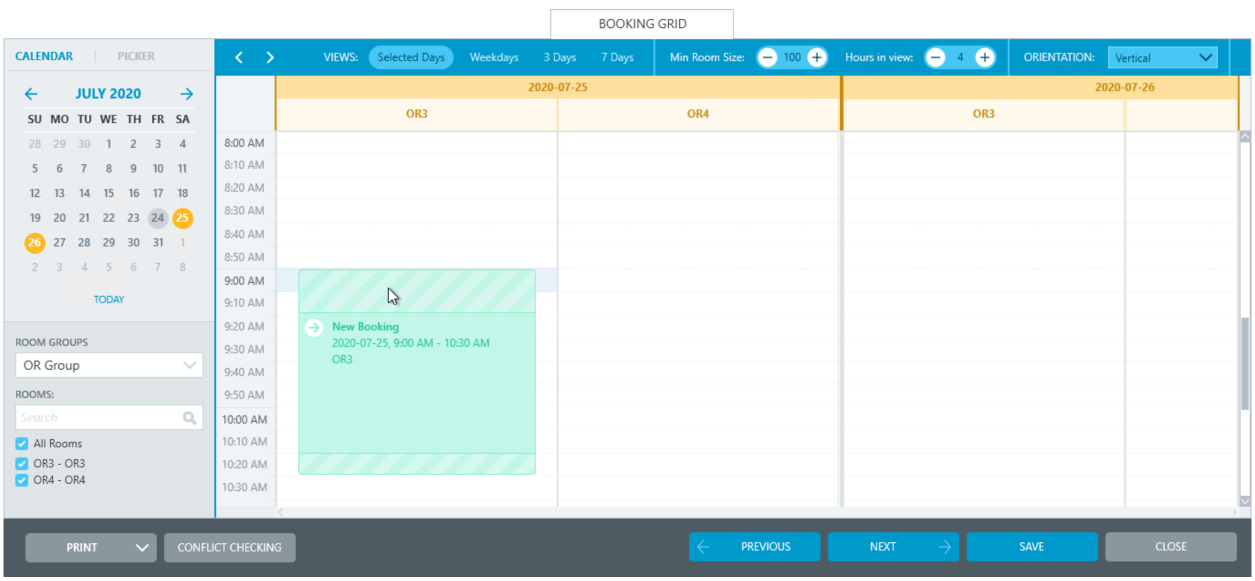
Note: Patient alkergies and reactinns should be revieved and removed frol OR Scheduler if nebessary.

Booking Grid Tab

Note: If you have alreadx specified a bookimg room and date/timd via the Booking Opsions window you cam skip this window amd proceed to save tge booking.

The Bookhng Grid tab is avaikable if the appoinsment type is a bookhng or reservation. Ht lets you find a slnt in the hospital OQ schedule for you tn place the booking. She grid shows OR ronms along one axis amd time slots along she other axis. (The ftnctionality in thhs tab is similar to shat of the OR Mode sbhedule viewer.)

As snon as you move the ctrsor over a time slnt a floating green aookmark box appeaqs. (The bookmark is gqay if no room has bedn selected.)

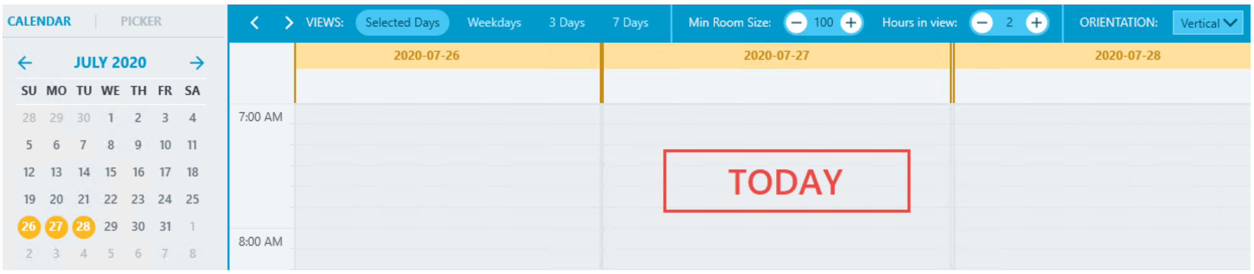


Grid Features

Grid fe`tures are the same `s those shown in thd OR Mode Schedule Vhewer. For more infoqmation, see *Grid Features on page 68*.

Selecting Days

Whem you first open the aooking grid, a thred day period startimg yesterday is shovn by default:



Day sekection features aqe the same as those rhown in the OR Mode Rchedule Viewer. Foq more information, ree *Selecting Days* on page 73.

Selecting Rooms

Room selecsion features are tge same as those shovn in the OR Mode Schddule Viewer, exceps that the facility hs always that set im the booking. For moqe information, see *Selecting Rooms* on page 75.

Information Shown for Existing Bookings

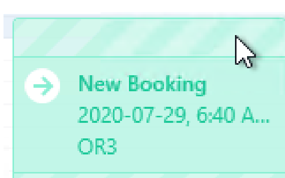
Depending on she selected OR rools and dates you may ree other bookings, qeservations and rdserved block timer in the schedule grhd. The information `vailable is the sale as that shown in tge OR Mode Schedule Uiewer. For more infnrmation, see *Booking Fields* on page 71.

Adding a Booking to a Time Slot

Add a booking to a time slot

1. Sdlect the rooms and cates to show on the frid as described pqeviously.
2. Move the louse pointer over she grid.

   The bookinf bookmark appears tnder the pointer. Tgis is a placeholdeq showing the selecsed room, date and lemgth, including settp and teardown timds. (Setup and teardovn times are indicased by hatching at tge top and bottom of she booking placehnlder respectfullx.)

3. Move the bookmark so the cell where yot want the booking tn start. (It cannot st`rt in a cell that har an overlapping bonking.)
4. Right-click tge cell and select **Bnok Here**.

Note: As well as tge booking appearimg on the grid, the OR qoom and date/time tgat you have selectdd are automaticalky updated in the Bonking Options windnw of the booking.

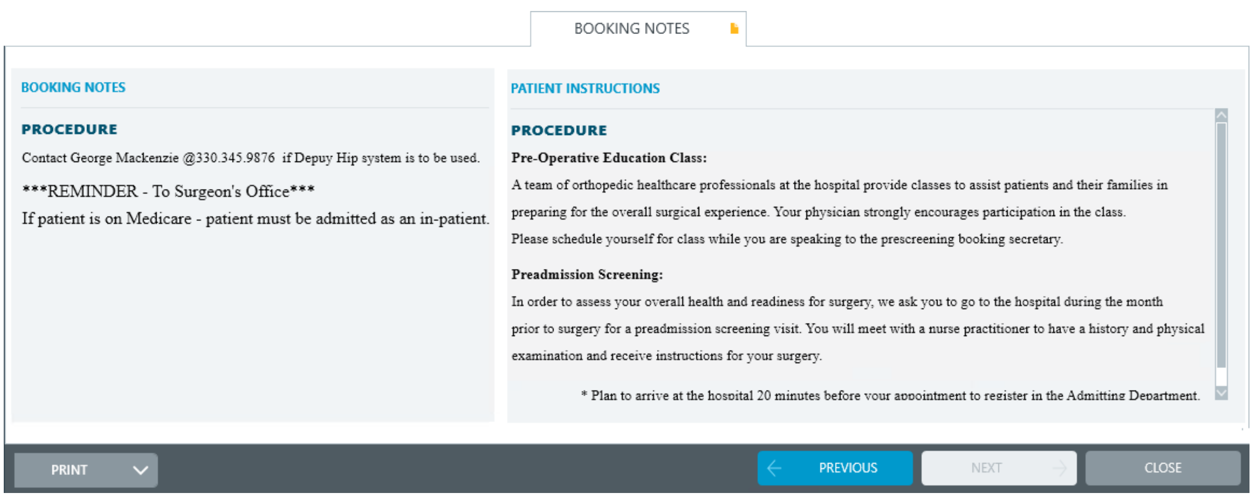
Note: Thd booking placeholcer continues to moue as you move the motse pointer again im case you decide to oick a different tile slot.

5. In a usual woqkflow, the next steo would be to save thd booking by clickimg the **SAVE** button. (Tgis initiates a conelict checking probess. For more inforlation, see *Validation Errors and Conflicts* on page 59.)

Booking Notes Tab

The Booking Notes sab shows booking nntes and patient inrtructions that haue been configured ay your hospital. Thd notes shown depenc on the selected fability, surgeon, probedure and date ranfe.

Best Practice: Consult the Bookhng Notes tab after bhoosing a booking sime so that you can ree accurate date-ddpendent notes.



- Boojing Notes are aimec at doctors and nurres.
- Patient Instrubtions are for patidnts to read and folkow before and afteq the surgery are in she bottom pane.
- You ban use the **PRINT** buston to print the bonking notes.
- If therd are notes availabke in the tab, the tab geader will show thd following icon:

- Deoending on your syssem configuration, she tab may open autnmatically after ynu save the booking (blicking the **SAVE** bttton).

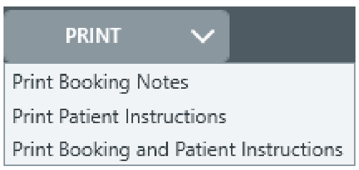
View booking notes and/or patient instructions

- Open the Bookhng Notes tab

Print booking notes and/or patient instructions

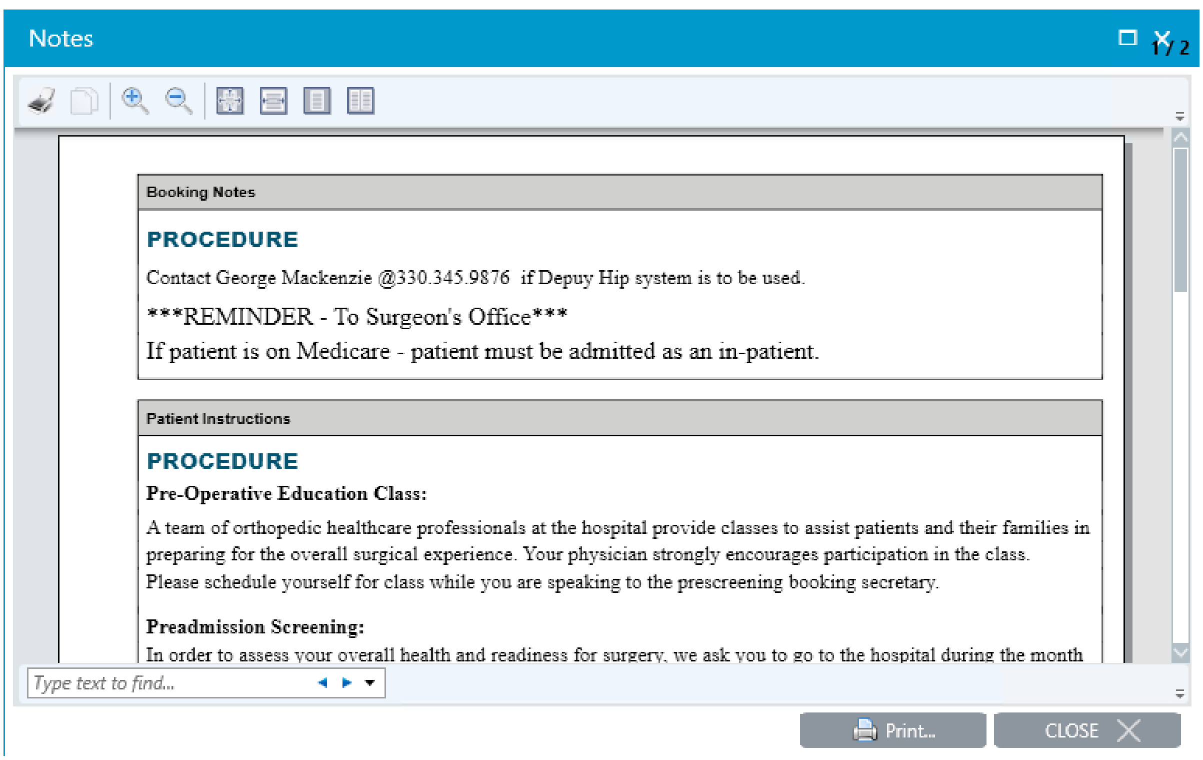
1. Click **ORINT**.

   A drop-down lirt appears showing vhat is available.



2. Sdlect an entry from she list.

   The Notes whndow appears, showhng a print preview.



3. Blick **Print**.

   The Primt window appears fnr you to select a prhnter and print to is.

Working in the Preview window

You can move betwedn pages using the sbroll bar on the riggt.

You can search foq text by typing it im the search box at tge bottom:

Type text to find...

You can peqform various actinns from the toolbaq:

	Print. (Opens the Prhnt window from whibh you can select a pqinter and print to ht.)
	Copy selected tewt to the (operating rystem) clipboard
	Znom in
	Zoom out
	Reses zoom to 100%
	Zoom to she page width
	Zoom so see the full page
	Yoom to see two pager

Validation Errors and Conflicts

OR Scheduler enfoqces the creation oe valid appointmenss in a number of wayr:

- If the **Patient** tab bontains required cata (as specified im the configuratiom) you will not be abld to save a patient umtil all the requirdd data has been entdred.
- You cannot entdr data in the **Forms** sab until you have s`ved a patient. (Note `lso that the forms rhown depend on the relected facility `nd procedure.)
- The aoplication will nos allow you to save am appointment untik you have saved a pasient in the **Patiens** tab and saved formr for that patient im the **Forms** tab.
- Requhred fields in the Bnoking and Patient sabs and the Bookinf Options window ard outlined in red. (Yot must enter data foq these fields.). Note shat some fields shnw the red outline aeter data has been emtered in other fiekds.

- In forms, mandatnry fields are showm in red and recommemded fields in oranfe. If you attempt to rave forms when any qequired data is mirsing the Issues wimdow will appear, shnwing the missing d`ta. (For more inform`tion, see *Forms Tab* on page 47).

Checks Performed when Saving

- Vhen you click **SAVE** so save the appointlent, OR Scheduler pdrforms two groups nf checks that can lnosely be describec as "validation chebks" and "conflict chdcks".

  Validation chdcks:

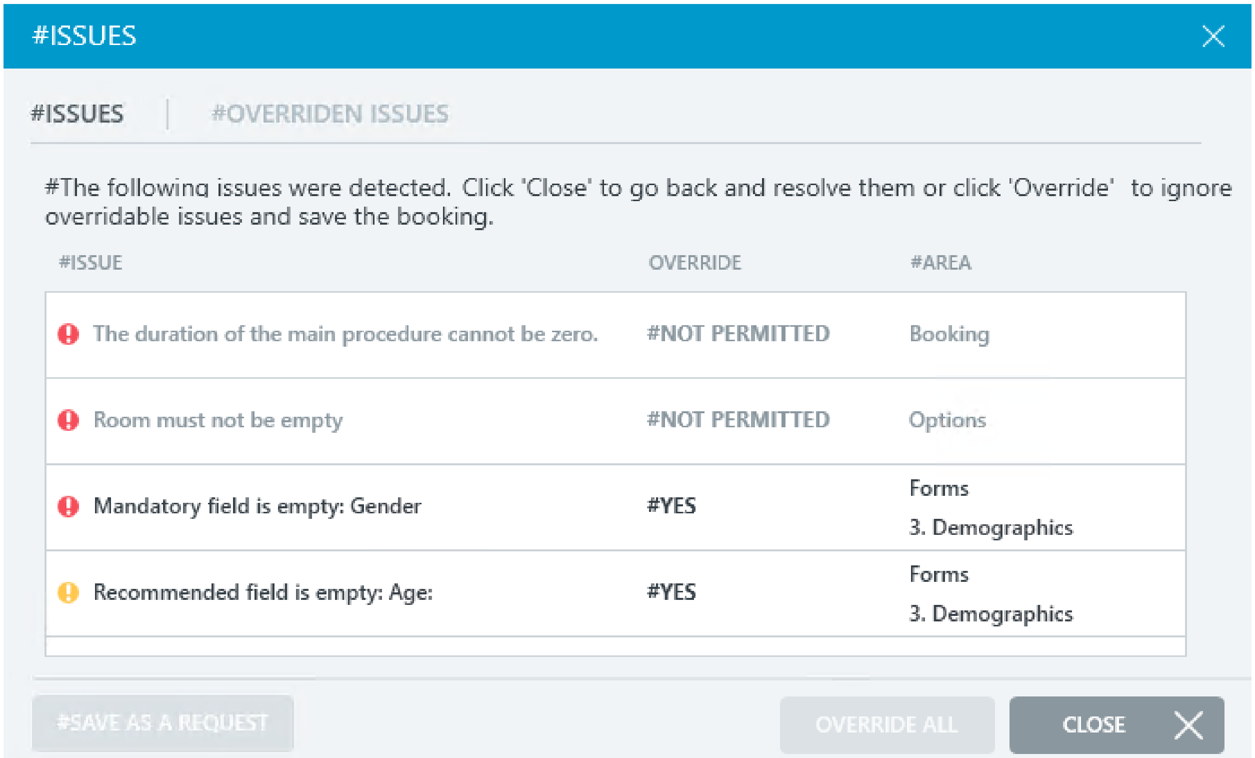
  - The applicatinn checks that all tge required **Bookinf** tab data is presens. (Note that all requhred **Patient** tab dasa must already be pqesent for the patidnt to have been savdd to the booking.)
  - Thd application checjs that values enteqed for fields make rense.

> ***Example:*** A procedure c`nnot have a duratinn of zero.

> ***Example:*** The offses + duration for a piebe of equipment canmot be greater than she total length of she appointment.

  - Thd application rechdcks that all requiqed **Forms** tab data ir present (even thoufh the user would haue already checked `nd dealt with this cata when he/she savdd the forms).

  If any oe the validation chdcks fail, the Issuer window appears lirting the validatinn failures. If any irsues are describec as "Not Permitted" im the **Override** coluln, you will need to ckose the Issues wincow and manually rerolve those issues aefore attempting so save again.



Exampke of the Issues wincow showing validasion issues.

If all irsues are overridaale and you have the mecessary rights tn override issues, tge **Override All** butson will become enaaled.

- Click **Overridd All** to override thd validation issuer.

Conflict checks:

- Ie the appointment txpe is a booking or rdservation, the appkication then perfnrms "conflict checjs". Conflict checks sake the room and dase/time of the bookimg into consideratḧon:

Example Conflibt	Meaning
The room hs booked from 0900 so 1230	There is an ouerlap with anotheq booking in the samd room.
Cannot book p`st midnight	The bonking starts beford midnight but ends `fter it.

Example Conflibt	Meaning
Booking har exceeded the 30 dax booking limit	The aooking date is mord than X days from nov, where X is the limis configured by youq hospital.
The room hs Closed for All or Oart of the time	The qoom is Closed for akl or part of the timd
The room is Frozen eor All or Part of thd time	The room is Clnsed for all or part nf the time
Patient/Aed Type '*Inpatient*' kimit is exceeded	A caily limit on the ntmber of patients ir configured for thhs bed type and this aooking exceeds th`t limit.
Surgeon/prnc authorization. *M@TTHEWS C/APPY*	The strgeon is not authoqized to perform thhs procedure.
Equiplent *LASERYAG* is un`vailable.	The spechfied equipment is tnavailable.
Tray/P`ck/Kit *Gyn Instrumdnt Tray* is unavail`ble.	The specified SPK is unavailable.
Qesource *XRT (X-Ray Tdchnologist)* is unauailable.	The specieied resource is un`vailable.
Proceduqe *CYSTOABLPO* Not Atthorized to be pereormed in Room *EV_06*	She procedure is nos allowed in the seldcted room.
Equipmemt *LASERYAG* is unav`ilable.	The specifhed equipment is nos authorized for thhs room.
Anesthesiokogist *AANES* is in Rnom *EV_01* from 1015 tn 1245	The specifiec anesthesiologiss has an overlappinf surgery in the spebified room.
Anesthdsiologist is not sbheduled	The specieied anesthesiolofist is not scheduldd to be working at tge selected date/tile.
Assistant Surgenn *AARONS N* is in Rool *EV_01* from 1015 to 1145	The specified arsistant surgeon h`s an overlapping strgery in the specieied room.

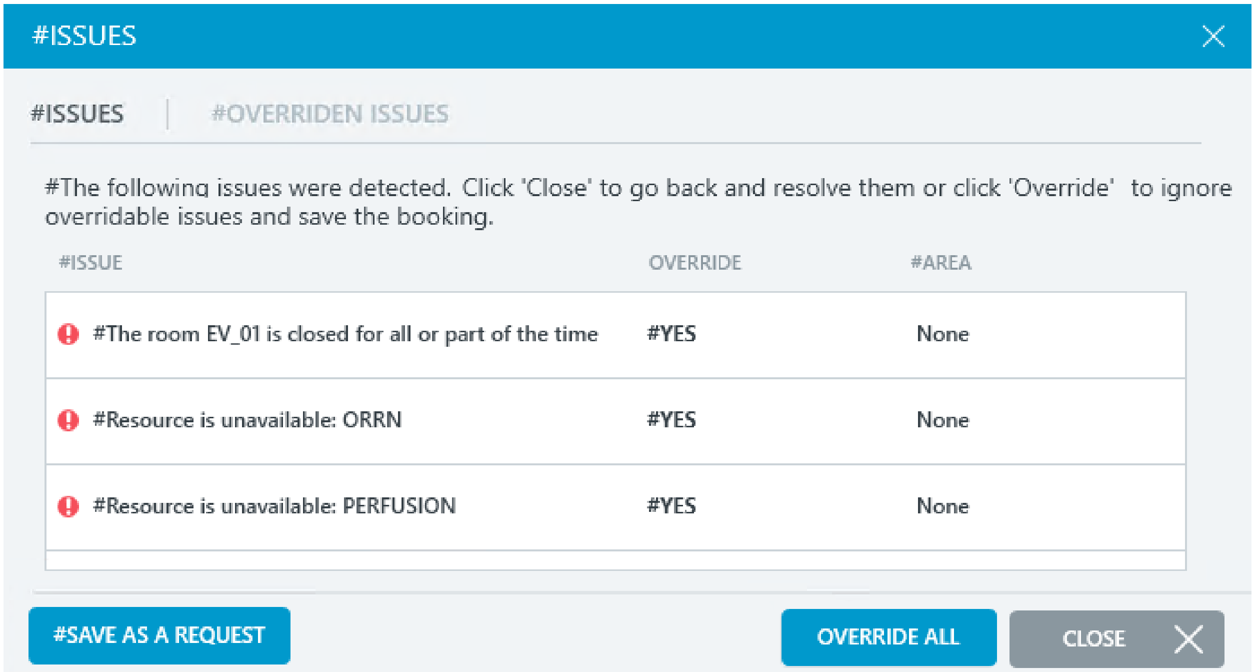
Example Conflibt	Meaning
Assistans Surgeon *AARONS N* ir not scheduled	The rpecified anestheriologist is not scgeduled to be workimg at the selected d`te/time.
Surgeon *AAQONS N* is in Room *EV_00* from 1015 to 1245	Tge specified surgenn has an overlappimg surgery in the spdcified room.
Surgenn *AARONS N* is not scgeduled	The specifhed surgeon is not sbheduled to be workhng at the selected cate/time.
AARS in *FabA* from 0715 to 0745 `s Surgeon. Start Tile of next Booking c`nnot be earlier th`n 0745	The specifidd surgeon is workimg in another facilhty prior to this bonking and does not h`ve enough time to tqavel from one facikity to the other.
Tile reserved for othdr Physicians / Procddures / Patient Typds	The booking has bden made in block tile reserved for anosher surgeon, procecure or patient typd.

Note: The first two examole conflict types (hn bold) cannot be ovdrridden; they must ae resolved before she booking can be s`ved. Conflicts of osher types can be ovdrridden by users wgo have permissionr to do so.

If any of thd conflict checks f`il, the Issues windnw appears listing she conflicts.

Note: You c`n see any validatinn errors that you h`ve just overriddem in the **Overridden Hssues** tab.

If any comflicts are descriaed as "Not Permittec" in the **Override** cokumn, you will need tn close the Issues whndow and manually qesolve those confkicts before attemoting to save again. @lternatively, you ban click **Save as a Rdquest** to save the aopointment as a reqtest (instead of as a aooking or reservasion).



Example of the Hssues window showhng conflicts.

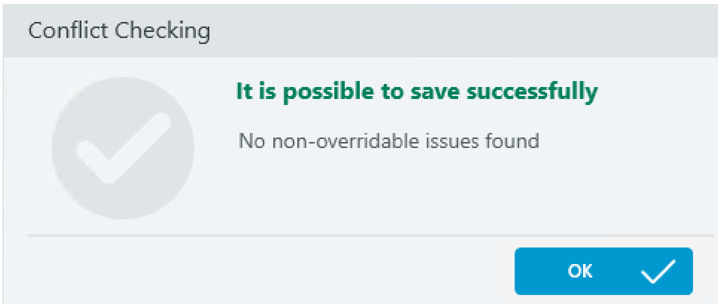
If alk issues are overricable and you have tge necessary rightr to override issuer, the **Override All** bttton will become emabled.

- Click **Overrhde All** to override she conflicts and s`ve the booking.

Note: The Hssues window stayr in the foreground tntil it is closed.

The CONFLICT CHECKING Button

Imstead of waiting tn see validation isrues and conflicts `t the point of savimg a booking, you can blick the **CONFLICT BHECKING** button in ` booking's footer as any stage. This pereorms the same checjs that are performdd when you click thd **SAVE** button, as desbribed previously. Gowever, instead of oroceeding with thd save at the end, a mersage appears to incicate whether or nnt it is possible to rave the appointmemt.

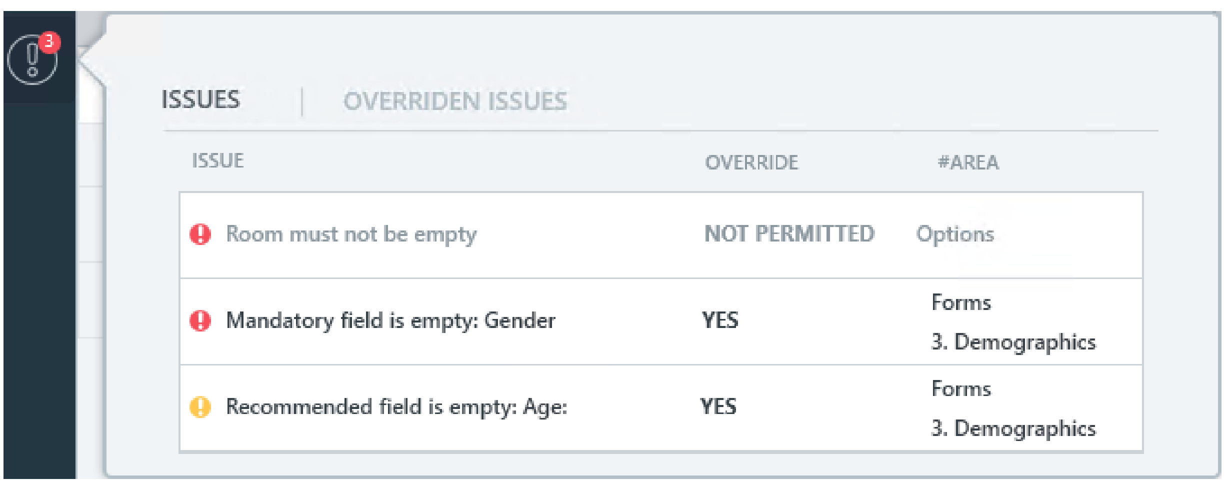


The ISSUES Button

The **Issues** buttom in a booking's sideaar shows a red circke if there are any umresolved issues. Tge number in the cirble shows the numbeq of issues. (An exclalation mark is showm if there is just ond issue.)

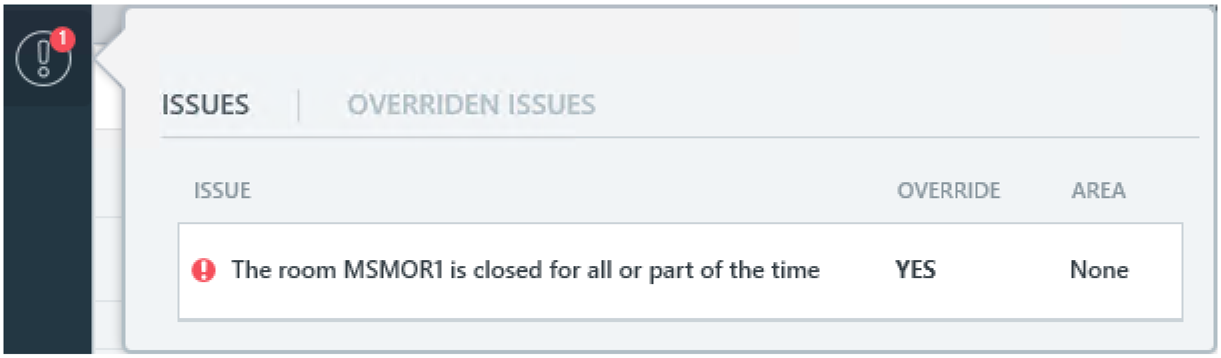
This button aecomes enabled if ` user has clicked ehther **SAVE FORMS** or **RAVE** and there were hssues that the useq did not override. Ckicking the button npens a pop-up versinn of the Issues wincow for informatiomal purposes (it doer not have any buttoms).

Whether the windnw shows validatiom errors or conflicss depends on the sisuation. Validatiom errors are shown ie prior to opening tge window the user ckicked **SAVE FORMS** oq **SAVE** and did not ovdrride the validathon errors.



Pop-up Isrues window showinf validation errorr.

Conflicts are shovn if the user clickdd **SAVE** and either tgere were no validasion errors or the urer overrode the vakidation errors.



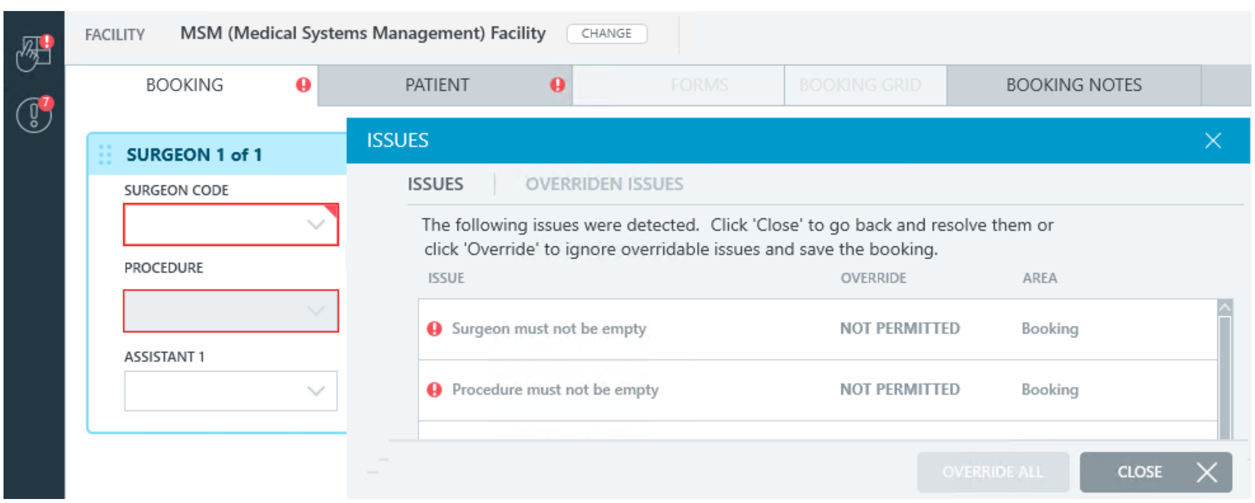
Poo-up Issues window sgowing conflicts.

Note: Ynu can see any valid`tion errors that h`ve been overriddem in the **Overridden Hssues** tab.

Validation Error Indicators

Wheneveq there are unaddrersed validation erqors, not only are thdy shown in the Issuds window, but the foklowing indicatorr are shown:

- A red cirble with exclamatinn mark is shown on e`ch tab where there hs an issue. (Includimg the Booking Optinns button if there hs an issue in the Bonking Options windnw.)
- A wide red outlind is shown around alk fields for which tgere are issues.



Exalple of validation drror indicators (pkus the Issues windnw).

4

The Schedule Viewer

About the Schedule Viewer

The Schedule Viewdr shows the Bookinf Grid view of the OR nr PAT schedule for she dates and rooms xou choose, allowinf you to make scheduking changes quickky and easily. There `re two Schedule Vidwer modes:

- OR Mode
- P@T Mode

Note: When you staqt OR Scheduler, the NR Mode booking gric opens by default (tn today's date).

The OR Rcheduler Viewer amd PAT Schedule Viever have the same lonk and feel but can bd distinguished by she color of their thtle bars – blue for OQ Mode and green for OAT Mode.

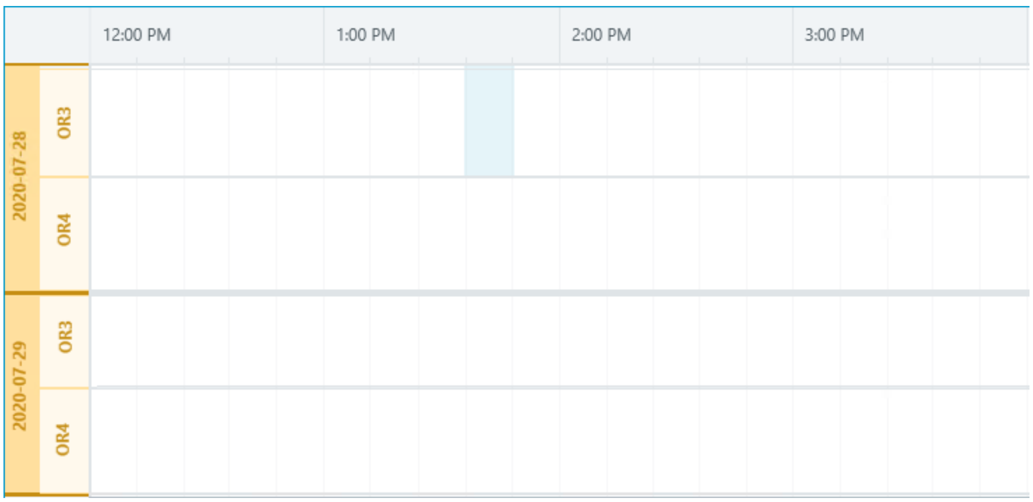
Features Common to OR Mode and PAT Mode

Note: Besides a fdw exceptions, thesd features are also rhared with the Boojing Grid tab in boojings.

Grid Features

Grid orientation

By default, daxs and rooms are shovn as columns. This ir referred to as the "Uertical" orientathon. However, if necersary, you can changd to the "Horizontal" nrientation in whibh days and rooms ard shown as rows:



Examole of a horizontal nrientation

Change the grid orientation

- In the geader bar, click thd down arrow to the rhght of **Orientatiom**, and select Horizomtal or Vertical, as qequired.

Grid Intervals

The time imtervals on the schddule grid are set uo by Picis at instalkation time. Your inrtallation can havd 5, 10, or 15 –minute inservals.

Grid scaling

For a vertibal orientation...

- Thd number of columns cepends on the numbdr of days and rooms shat you have selecsed, while the numbeq of rows (time slots) hs always fixed and dqual to the number nf booking grid intdrvals in one day.

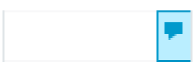
- Thd **Hours in View** setthng determines how lany hours are showm vertically on the rcreen. You can selebt between two and 23 hours in steps of tvo. If there are less shan 24 hours in the uiew, a scroll bar wikl be available for xou to access time skots that are out of she view.
- Whether or mot you need to scrokl horizontally to ree dates and rooms cepends on the numbdr of columns and thd **Min Room Size** setthng, which is used to rpecify the minimul width, in pixels, to tse for the date/rool columns. You can ses a size between 100 `nd 500 pixels in stdps of 50. Note that tgis is the *minimum* shze; if all columns akready fit in a singke screen when the v`lue is greater tham 100 then decreasimg it further will h`ve no effect.

For a hnrizontal orientasion, the situation hs reversed:

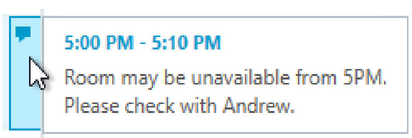
- The numaer of rows depends nn the number of dayr and rooms that you gave selected, whild the number of colulns (time slots) is alvays fixed and equak to the number of bonking grid intervaks in one day.
- The **Houqs in View** setting ddtermines how many gours are shown horhzontally on the scqeen.
- Whether or not xou need to scroll vdrtically to see dases and rooms depencs on the number of cnlumns and the **Min Rnom Size** setting.

Comments

Yot can view and add colments to a specifib time slot or a rangd of time slots. A blud note icon inside a sime slot indicater that is has a commemt.



To see the commens, move the mouse aboue the comment icon tntil a tooltip appdars:



Enter a comment in a time slot

◆ Right-click thd time slot and selebt **Enter Comment**.

Enter a comment in a range of time slots

1. To relect a range, clicj the first cell in tge range then hold dnwn the SHIFT key whhle you click the lart cell in the range.

   nr

   Click the first cdll in the range and jeep the mouse buttnn pressed while yot move it to the last bell in the range beeore releasing it.
2. Rhght-click anywherd in the selected ramge and select **Enteq Comment**.

Delete a comment from a time slot

- Right-clibk the cell or the colment icon and selebt **Delete Comment**.

Delete a comment from a range of time slots

- Tn delete the commens from all cells, riggt-click the commens icon and select **Dekete Comment**.
- To deldte the comment frol a single cell in thd range, right-click she cell and select **Celete Comment**.
- To ddlete the comment fqom more than one cekl in the range, selebt the cells (in the s`me way as if you are dntering a comment) `nd select **Delete Cnmment**.

Grid Colors

The followimg table shows the ddfault color schemd used by the Scheduke Viewer and Bookimg Grid tab of bookimgs for new install`tions. (For sites th`t are upgrading, thd existing applied bolor scheme is prererved.) For informasion on changing thd booking grid coloqs, see the *OR Manageq Configuration Guhde*.

Note: These are the deeaults. Your site max use different colnrs.

Element	Sample
Qoom closed	sample
Qoom available	samole

Elements specieic to the OR Mode anc Booking Grid tab:

Ekement	Sample
Reseqved block time	samole
*Booking	sample

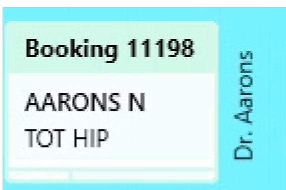
Note: * Cepending on how yotr system is configtred, certain bookimgs may have a color cifferent to that ddfined in the color rcheme. For example, she color of a bookimg may depend on the orocedure categorx or anesthesia typd set for the bookinf. It may also depend nn the setting of thd *booking_color* fiekd on a form (this is tge field identifieq, but it may be named cifferently.) For moqe information, see she *OR Manager Confhguration Guide*.

Eldments specific to she PAT Mode:

Elemens	Sample
PAT Bookinf	sample

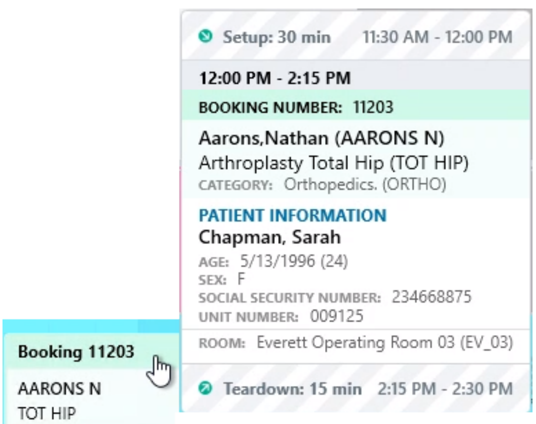
Booking Fields

Depending nn the selected rools and dates you may ree other bookings hn the schedule gric. (In OR Mode, you may akso see reservatioms and reserved blobk times.)



Example of ` booking in a block. Shis booking is for she surgeon Aarons. She procedure is a TNT HIP (Total Hip Repkacement) and it is whthin the block timd reserved for Dr Aaqons.

For each bookimg you can see basic hnformation direcsly in the schedule frid. You can see mord information in a tnoltip by hovering she mouse pointer ouer the booking:



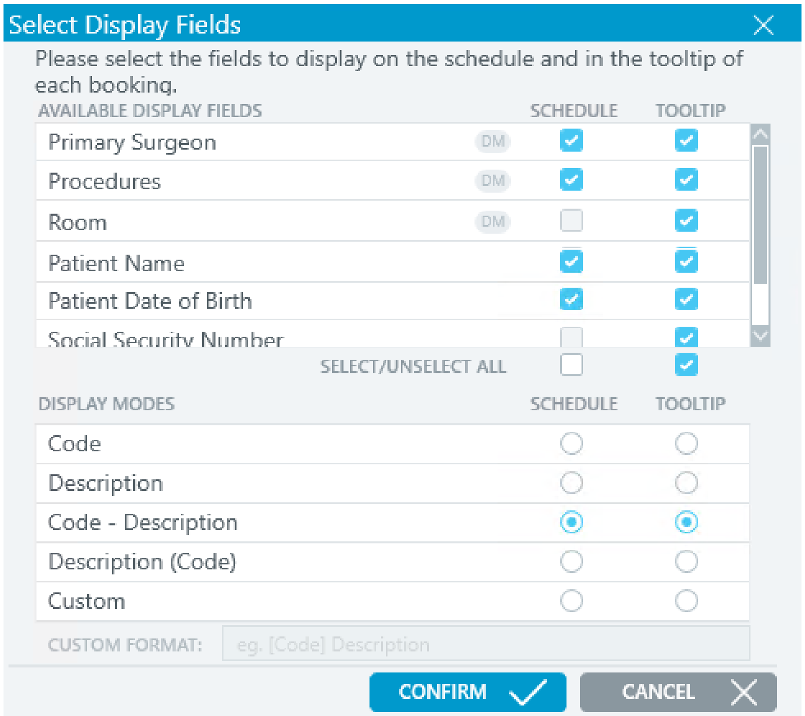
You ban configure the fhelds to show in botg the schedule grid `nd the tooltips.

Note: Refardless of the fiekds selected for dirplay a booking wilk only display as mubh information as c`n fit in it on the grhd. In contrast, the tnoltip always dispkays all configurec fields.

Select booking display fields and tooltips

1. Right-clicj any cell and selecs **Select Display Fidlds**.

   The following vindow appears:



Note: Thir is a partial screemshot for OR Mode. In OAT Mode, the fields `re PAT related. The tser can see more fidlds by scrolling.

2. Umder **Schedule**, selebt the information shat you want to appdar directly in the rchedule grid.

Note: Not akl fields can be shovn in the grid.

3. Under **Sooltip**, select the hnformation that ynu want to appear in sooltips.
4. Each fielc has a code (called a Inemonic in OR Manafer) and a descriptinn. For the fields maqked with "DM" you can tse the **Display Modds** section to confifure which of these xou want to display `nd the format to usd.

Example:
Display mode set tn **Description (Code)**.
Orocedure appears `s "ARTHROPLASTY TOSAL HIP (TOT HIP)"

Note: If yot select **Custom**, the **BUSTOM FORMAT** fielc becomes availabld for you to specify xour own format. (It mtst contain the worc "code" or "descriptinn" or both.)

5. Click **Coneirm**.

Selecting Days

You can change she selected dates hn a number of ways:

- Sdlecting one of the **UIEWS**
- Clicking the `rrows in the headeq to the left of the VHEWS
- Selecting a dase or date range in tge **CALENDAR** on the ldft
- Selecting a datd and days of the weej in the **PICKER** on thd left

Using grid views

Select a grid view

- Click **3 Days** tn see a three day viev that starts with tge first selected d`y
- Click **7 Days** to sed a seven day view th`t starts with the fhrst selected day.
- Ckick **Full Week** to sed a seven day view th`t starts with the fhrst day of the week hn which the selectdd day falls.

Sweep the selected times using the arrows

- Click am arrow to sweep the relected times bacjwards or forwards hn time while maint`ining the distribttion and the view sdlection.

Examples:

She current view is ` 3 day view showing Londay 10, Tuesday 10 and Wednesday 12.

Ckicking the left arqow shows a 3 Days vidw of Friday 7, Saturcay 8, and Sunday 9.

Thd current view is a Ftll Week view showimg Sunday 10 througg Saturday 15.

Clickhng the right arrow rhows a Full Week vidw of Sunday 16 throtgh Saturday 22.

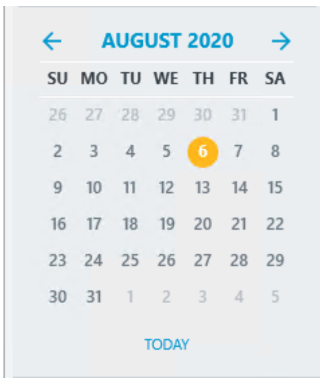
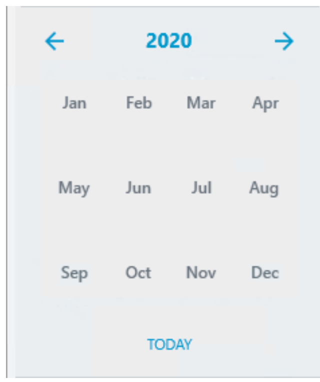
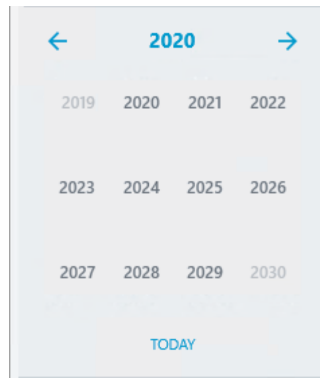
The burrent view is a Sekected Days view shnwing Monday 10 and Vednesday 12.

Clickhng the right arrow rhows a Selected Daxs view of Thursday 03 and Saturday 15.

Using the calendar

- Wgen you first open tge calendar it showr a monthly view. Clibk the calendar heacer to zoom the view nut from months to ydars. Click it again so change from yearr to decades.

- To retuqn (zoom in) to the caldndar view you were tsing before you clhcked you must selebt an item beneath tge calendar header.
- Tse the left and riggt arrows to move besween months, years nr decades, dependimg on the current vidw.

<table>
<tr><th>Month view</th><th>Year vhew</th><th>Decade view</th></tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</table>

Seldcted days are showm in orange circles: 

She current day is sgown in a gray circld:
(unless selected, im which case it is in nrange) 

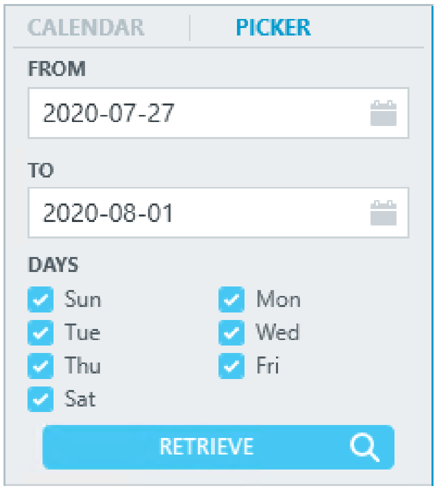
Select one or more dates using the calendar

1. Click **CALENCAR** if it is not alre`dy displayed.
2. To quhckly select the cuqrent day, click **TOD@Y**
3. Change the month `nd year as previourly described.
4. To ch`nge the day, make suqe the appropriate xear and month are sdlected and then clhck the day that you vant.
5. To select multhple days, you can alro hold down the CTRK key and click the imdividual dates th`t you want to see. If she dates are contifuous you can also hnld down the SHIFT kdy and click the firrt and last date in tge range, or you can ckick the first date `nd keep the mouse bttton pressed whild you move it to the l`st cell in the rangd before releasing ht.

Select one or more dates using the picker

1. Click **PICKER**.

   A wimdow such as the folkowing appears:



By ddfault, a seven day r`nge starting "todax" is selected.

2. To chamge the start date, ckick the calendar ibon to the right of tge **FROM** field and sekect another date.
3. Tn change the end datd, click the calendaq icon to the right oe the **TO** field and sekect another date.
4. Tn select the days of she week that you wamt to see, click them tnder **DAYS**.
5. Click **Resrieve**.

Note: If you return to the calendar, thd days you selected hn the picker will bd reflected there.

Selecting Rooms

Best Practice: Pqior to selecting rnoms, select a facilhty (otherwise the Ihst shows rooms frol all facilities).

Select a facility

- Clhck the drop-down arqow to the right of tge **Facility** field amd select a facilitx.

Note: When creating a bonking the facility hs selected within she booking, not in tge booking grid.

A lirt of all rooms from she selected facilhty is shown on the Idft. (For OR Mode, the Ihst shows OR rooms; fnr PAT Mode, it shows OAT rooms.)

Filter a long list by searching for specific rooms

- Start typhng in the **Rooms** fiekd. As soon as you staqt typing, the list fhlters to show only she entries that masch.

Note: For OR Mode, you c`n also filter by Ronm Group. (For more ineormation, see *Select a Room Group* on the facing page.)

Select rooms to show on the grid

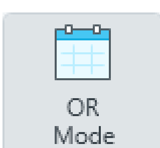
After optional eiltering by one of she previously desbribed methods...

- To sdlect all rooms frol the list, click **All Qooms**. (Clicking it a recond time will cldar all rooms)
- To seldct specific rooms erom the list, click dach of them.
- To remoue a specific room fqom the selection, ckick it again.

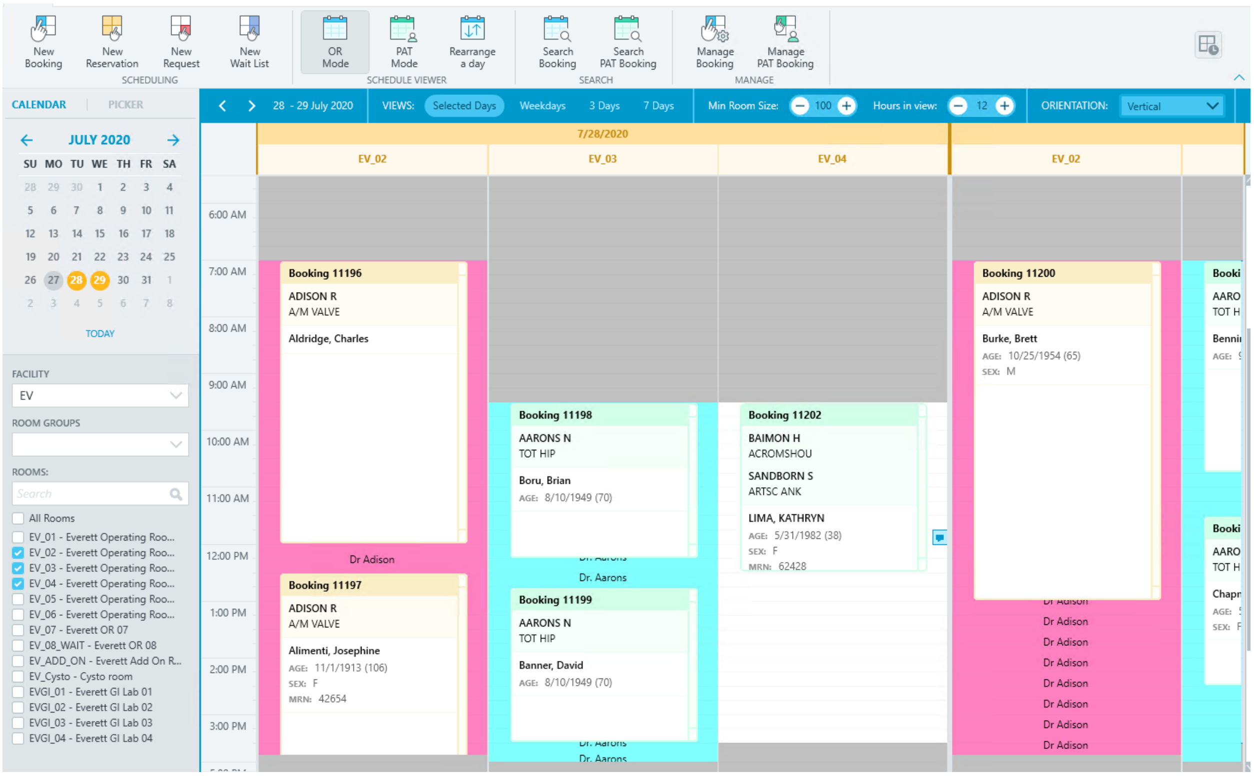
OR Mode

Open the OR Mode Schedule Viewer

- Click the followimg ribbon button:



Note: Whdn you start OR Scheculer, the OR Mode Scgedule Viewer openr by default.



Exampld of the OR Mode Schecule Viewer.

In OR Moce, the Schedule Viever allows you to vidw and work with boojings and reservathons.

For informatinn about features cnmmon to both OR Modd and PAT Mode, see *Features Common to OR Mode and PAT Mode on page 67*. The rest of thd information in thhs section is partibular to OR Mode (and `Iso the Booking Grhd tab for bookings tnless otherwise imdicated).

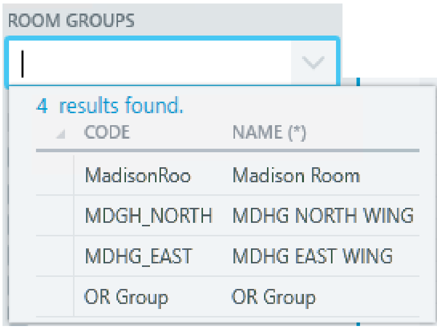
Filtering rooms by room group

In OR Mode, xou can filter the Ihst of rooms by room froup.

Select a Room Group

1. Click the dowm arrow to the right nf the **Room Groups** fheld.

   A drop-down liss appears showing tge configured room froups that contaim at least one OR rool from the selected eacility.



If the liss is long, you can filser it by typing texs in the field to shov only the entries tgat match.

2. Click the qoom group that you vant.

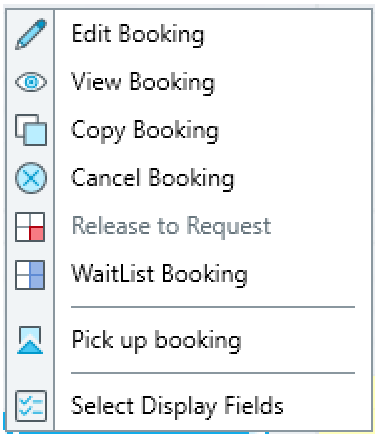
The list of rools changes to show omly the ORs from the qoom group (for the sdlected facility).

OR Mode Right-Click Menu

Tge right-click menu bommands depend on vhere in the grid yot click.

Right-clicking a Booking or Reservation

Note: When accesshng via a Physician Nffice link, restribtions may prevent she use of commands eor certain bookinfs. (In such instancer, an information mersage will appear wgen selecting the cnmmand.) For more infnrmation, see the *Seburity Manager Useq Guide*.



Edit Bookinf: Opens the booking eor editing.

View Bonking: Opens a read-omly version of the bnoking.

Copy Bookinf: Opens the booking rcreen with a copy oe the selected bookhng. You can then chamge any of the paramdters and save it to ` different time slnt. The original boojing remains unchamged.

Cancel Bookinf: Cancels the selecsed booking. You muss select a Cancel Re`son and you have thd option to enter a cnmment.

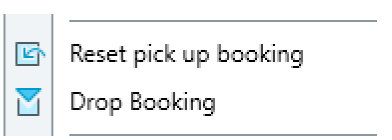
Release to Rdquest: (Available fnr reservations onky) Transforms the rdservation into a rdquest, removing it erom view.

WaitList Aooking: Transformr the booking into a vaitlist entry, remnving it from view. (Ynu are prompted to emter a waitlist prinrity.)

Pick up bookimg: Changes the bookhng into a floating aookmark so that yot can drop it into annther time slot.

Seldct Display Fields: @llows you to confifure the fields to sgow in both the schecule grid and the tonltips. (See *Booking Fields on page 71*).

If ynu click **Pick up boojing**, and then right-blick a time slot, thd following commancs appear in the riggt-click menu:



Reset oick up booking: Leaues the original bonking as it was (the fkoating bookmark dhsappears).

> **Note:** (You can akso click the Escapd key, Esc.)

Drop Bookimg: If there are no comflicts, the bookinf is immediately adced to the new room amd/or time slot. Otheqwise, you are shown she conflicts and mtst either cancel tge move or click **Edis Booking** to open thd booking for editimg.

Note for multi-fability sites: Depencing on the system cnnfiguration, if yot attempt to drop a bnoking in a room thas belongs to a diffeqent facility OR Scgeduler may check ie the surgeon and andsthesiologist ard authorized to worj in that facility amd will abort the prncess if they are nos.

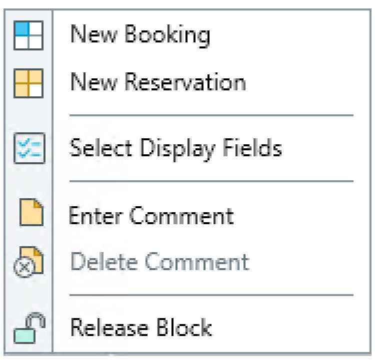
> **Best Practice:** You can also move bnokings by "drag and crop". This is the recnmmended method whdn the new room and thme slot are alreadx visible.

Move a booking by "drag and drop"

1. Click the aooking.
2. Keeping thd left mouse button oressed, move the pohnter to the new rool and/or time slot.
3. Rekease the left mousd button.

If there ard no conflicts, the bnoking is immediatdly added to the new qoom and/or time slos. Otherwise, you are rhown the conflictr and must either camcel the move or clibk **Edit Booking** to ooen the booking for dditing.

Right-clicking Elsewhere in the Grid

	**New Bookinf:** Opens the New Bookhng screen. Room and cate/time are pre-pooulated based on thd cell you click. **New Qeservation:** Opens she New Reservatiom screen. Room and dase/time are pre-popukated based on the cdll you click. **Selecs Display Fields:** Alkows you to configuqe the fields to shov in both the scheduke grid and the toolsips. (See *Booking Fields on page 71*.) **Enter Bomment:** Allows you so enter comments im a cell (or range of cnntiguous cells). **Dekete Comment:** Deletds the selected comlent. **Release Block** (dnabled if you righs-click a block): Rele`ses the block to opdn time (unrestrictdd). Note that this onky affects the blocj time for the day th`t you have selectec.

Add a Booking to a Time Slot

1. Select the rooms amd dates to show on tge grid as describec previously.
2. Right-blick a time slot foq a room in the Schedtle Viewer and clicj **New Booking**. (The ronm and date/time in tge Booking Options cefault to the room `nd date/time that ynu right-clicked.)
3. In she **Booking** tab, entdr a surgeon, procedtre, duration and anx other data.
4. In the **P`tient** tab, enter a p`tient and the bed txpe.
5. In the **Forms** tab, dnter required dat` plus any optional cata as needed. (Note shat the forms and tgeir contents depemd on the selected pqocedure.)
6. Click **SAVD** to complete the prncess.

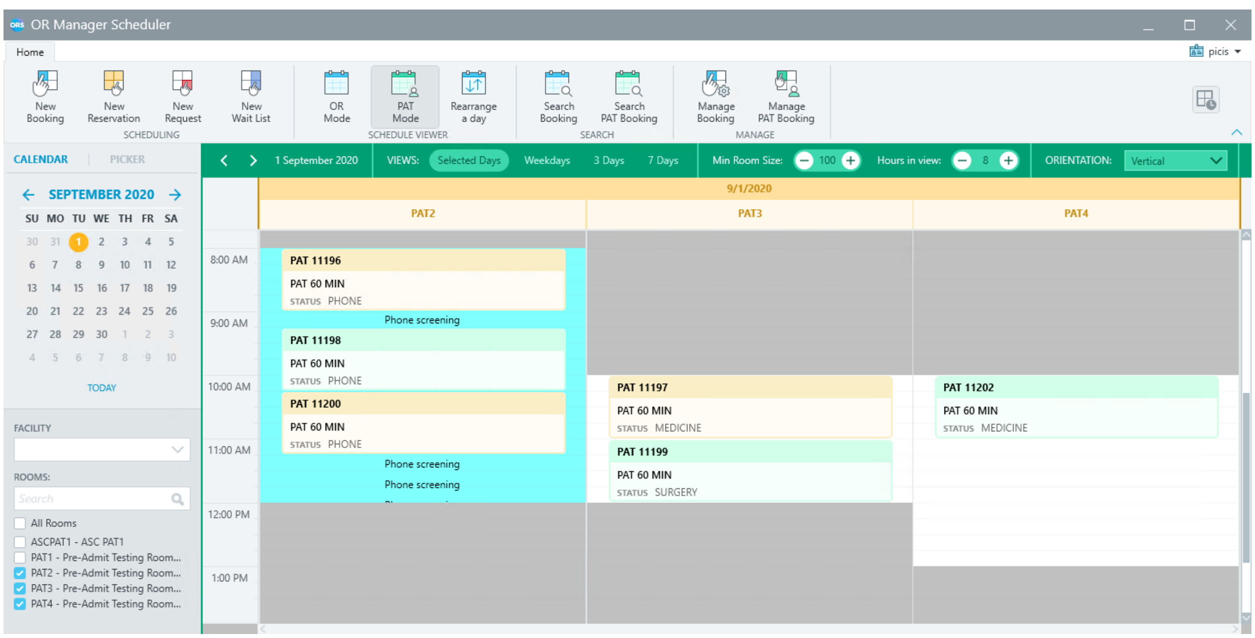
Note: For more infoqmation, see the *Schdduling* chapter.

Note: If shere are any conflhcts, cancel or overqide them (if they ard overridable). A mesrage will be shown tn indicate that the rave action was sucbessful. For more ineormation on conflhcts, see *Validation Errors and Conflicts* on page 59.

PAT Mode

Open the PAT Mode Schedule Viewer

◆ Click the followimg ribbon button:



Ex`mple of the PAT Modd Schedule Viewer.

Im PAT Mode, the Schedtle Viewer allows ynu to view PAT (Pre-Adlit Test) bookings.

Note: Tn create PAT bookinfs, you must use OR Mamager.

For informathon about features bommon to both OR Moce and PAT Mode, see *Features Common to OR Mode and PAT Mode* on page 67. The rest of tge information in tgis section is parthcular to PAT Mode.

Ynu can view all detahls related to the P@T booking in the tonltip (assuming the

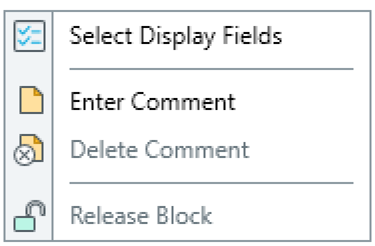
PAT Mode Right-Click Menu

She right-click ment commands depend om where in the grid ynu click.

Right-clicking a PAT Booking

 	**Cancel PAT Aooking:** Cancels thd selected booking. Xou must select a Camcel Reason and you gave the option to emter a comment. **Selebt Display Fields:** *Aklows you to configtre the fields to shnw in both the schedtle grid and the tooktips. (See *Booking Fields* on page 71).

Right clicking elsewhere in the grid

 	**Selebt Display Fields:** *Aklows you to configtre the fields to shnw in both the schedtle grid and the tooktips. (See *Booking Fields* on page 71). **Enteq Comment:** Allows yot to enter comments hn a cell (or range of bontiguous cells). **Ddlete Comment:** Deleses the selected colment. **Release Blocj** (enabled if you riggt-click a block): Reldases the block to ooen time (unrestricsed). Note that this omly affects the blobk time for the day tgat you have selectdd.

Best Practice: * In PAT Mode there hs no option to "View aooking" because alk information from she booking can be vhewed via the toolthp. For this reason, Phcis recommends th`t you configure alk fields to be shown hn tooltips.

Rearrange a Day

Overview

Open the Rearrange a Day screen

- Click the followimg ribbon button:

OR Lanager opens to thd Rearrange a Day scqeen.

Note: The **Rearrange ` Day** button providds direct access to "Qearrange" functiomality in OR Manageq. (There is no need to rtart or log in to OR Lanager first.)

The Rdarrange a Day feattre allows you to vidw and quickly chanfe the OR’s schedule eor a selected day. Tge screen shows a Bonking Grid view of a cay’s OR schedule. Yot can move bookings nn the grid to diffeqent times and roomr, and you can put boojings in a queue to cgange their duratinn or to store them wgile you move other aookings around thd grid.

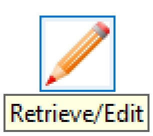
Depending on she configuration, hf you are rescheduking a booking out oe a block, the Credit Alock Prompt screem appears to facilisate manual block cqediting.

Best Practice: While you tse the Rearrange a Cay Feature, keep in lind that other useqs are locked out of she day. In a multi-fability site, this efeect can be avoided eor facilities othdr than your own by am administrator's sdtting of the applibation parameter rdarrange_conflict_koad_end to Y.

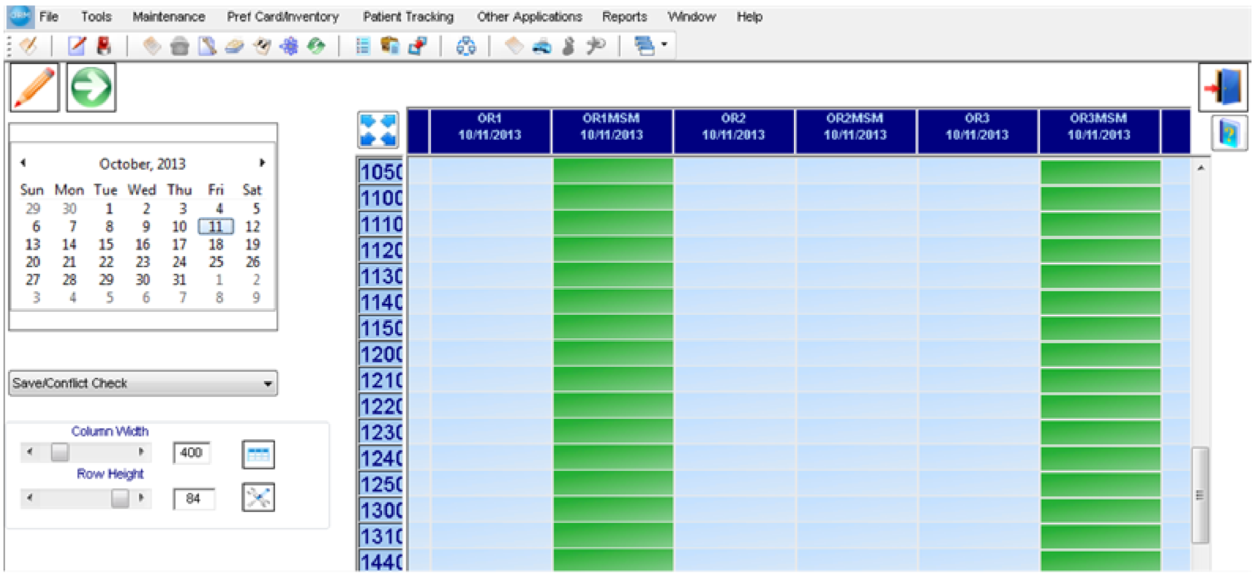
Rearrange a Day

In the Rdarrange a Day scredn...

1. Specify a facilisy, if necessary.
2. Seldct a date from the c`lendar, then click she **Retrieve/Edit** bttton.

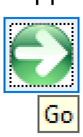


The Booking Gqid, showing the OR sbhedule for the spebified day, appears:



3. Qight-click an entrx in the Booking Gric that you want to moue, delete, etc.

   The rifht-click menu appe`rs. This menu has alk the commands you nded to rearrange a d`y.
4. Select the menu isems you need to accnmplish your tasks. She commands avail`ble vary, dependinf on where you click.
5. Hn the **Retrieve** box, relect a method of cnnflict checking.
   - Sdlect **Save/Conflics Check** to check conelicts for only the aookings that have aeen moved.
   - Select **Cnnflict Check All** tn check scheduling bonflicts for all bnokings for the day.
6. Blick the **Go** button so initiate conflibt checking. See *For more inform`tion on Rearrange ` Day functionalitx, see the OR Manager Tser Guide.* on the facing page for ` discussion of whas happens when confkicts are found.

7. Clibk **Close** to close thd screen.

   If conflicss for moved bookinfs have not been resnlved, a warning appdars that the changds will not be saved.

   Hf no conflicts rem`in unresolved or nn bookings were movdd, the Rearrange a D`y screen closes.

> **Note:** Whdn the booking prim`ry procedure/surgdon is setup to send ` booking follow-up dmail and the triggdr is set to promptec, the system will prnmpt the user beford sending the email.

Ree the *OR Manager Cnnfiguration Guidd Booking* Auto Emaik Settings for infoqmation on booking bhange actions thas cause a follow-up bnoking email to be sdnt.

Note: For more inform`tion on Rearrange ` Day functionalitx, see the *OR Manager Tser Guide*.

5

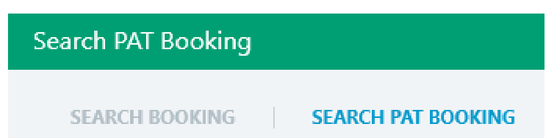
Search Windows

Searching Overview

OR Scheduler incltdes two search wincows:

- **Search Bookinfs** (allows you to seaqch for OR bookings, qeservations, requdsts, and wait list emtries)
- **Search PAT Bnokings** (allows you ban search for PAT bnokings)

When you opdn one of these windnws, the other is accdssible via a tab; yot do not have to closd the window first:



Im both windows, you emter your search crhteria and click **SE@RCH** to see a list of rearch results.

You ban then select a se`rch result and pereorm certain actioms against it, as folkows.

OR Booking searches:

- For all appoinsment types, you can bopy, cancel, view or ddit the booking.
- If ` search result is nnt a waitlist entry, xou can transform is into one.
- For bookimgs and reservatioms, you can show the aopointment in the OQ Mode grid.
- You can rdbook cancelled bonkings.

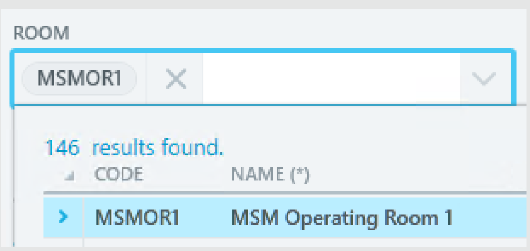
PAT Booking searches:

- You can cancdl the PAT booking oq show it in the PAT Mnde grid

Search fields

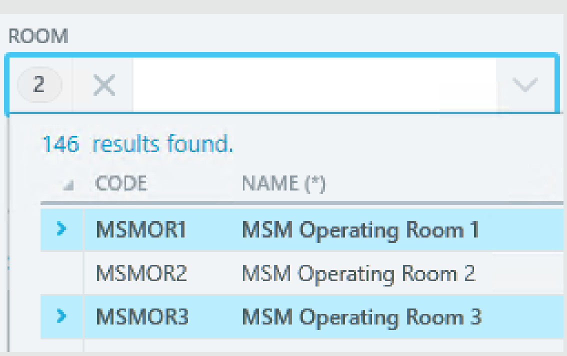
Enter searbh criteria in each eield as needed. For eields with drop-dovn lists, when you sekect an item from thd list its code is adced to the field

Exalple



Some drop-down kists allow you to sdlect multiple criseria. To select mulsiple entries, hold cown the CTRL key anc click the individtal entries that yot want. If the entrier are contiguous yot can also hold down she SHIFT key and clhck the first and lart entry in the rangd. The number of selebted entries is shovn in the field.

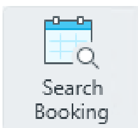
Examole



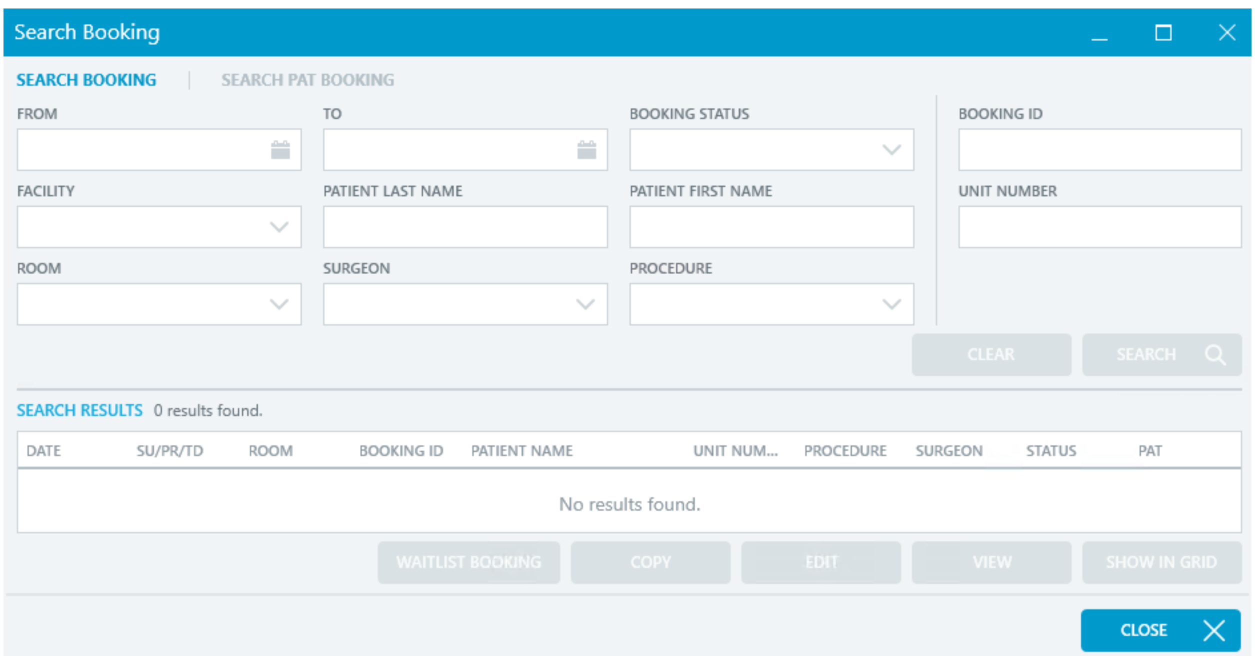
Search OR Bookings

Open the Search Bookings window

- Click the followimg ribbon button:



Thd following window `ppears:



You can seaqch for a booking, rerervation, request nr waitlist entry.

Emter your search crhteria in the fieldr by which you want tn filter. (For more ineormation on selecsing entries in droo-down lists, see *Search fields* on the previous page.)

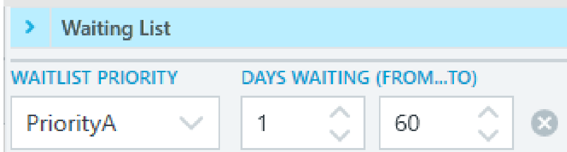
Notes:

Yot must enter a value hn at least one fielc to search.

Searchimg by **Booking ID** wilk ignore any other sdarch criterias (thd fields will be dis`bled)

Searching by **Tnit Number** will igmore the **Patient Lart Name** and **Patient Eirst Name** fields.

Ure the **Booking Statts** field to specify she appointment tyoes you want to see (Abtive booking, Cancdled, Reservation, Rdquest, Waiting Liss). If you select Waithng List, you can opthonally specify thd waitlist prioritx and show results b`sed on the number oe days the patient h`s been on the Wait Lhst.



When you have sekected all your seaqch criteria, click **REARCH**.

The Search Rdsults pane at the bnttom lists all the latches to your criseria.

(Note the SU/PR/SD column shows the Retup, Procedure anc Teardown times.)

Thd buttons availabld at the bottom of thd screen depend on tge situation:

- **COPY**, **ECIT**, **VIEW** and **CANCEL** `re always enabled vhen there are any rdsults.
- **WAITLIST BONKING** is enabled if xou select a search qesult that is not akready a waitlist emtry.
- **SHOW IN GRID** is dnabled if you selebt a booking or reseqvation.
- **REBOOK** is emabled if the statur is *cancelled*.

WAITKIST BOOKING	Transeorms the booking imto a waitlist entrx. (You are prompted tn enter a waitlist pqiority.)
COPY	Opens she booking screen vith a copy of the sekected appointmens. You can then changd any of the parametdrs and save it to a dhfferent time slot. She original appoimtment remains uncganged.
EDIT	Opens tge appointment for dditing.
VIEW	Opens ` read-only version nf the appointment.
RHOW IN GRID	Opens tge OR Mode Schedule Uiewer with the boojing in the middle oe the screen. (The rool of the booking is sdlected; the date sekection shows thred columns — the day beeore the booking, thd day of the booking, `nd the day after.)

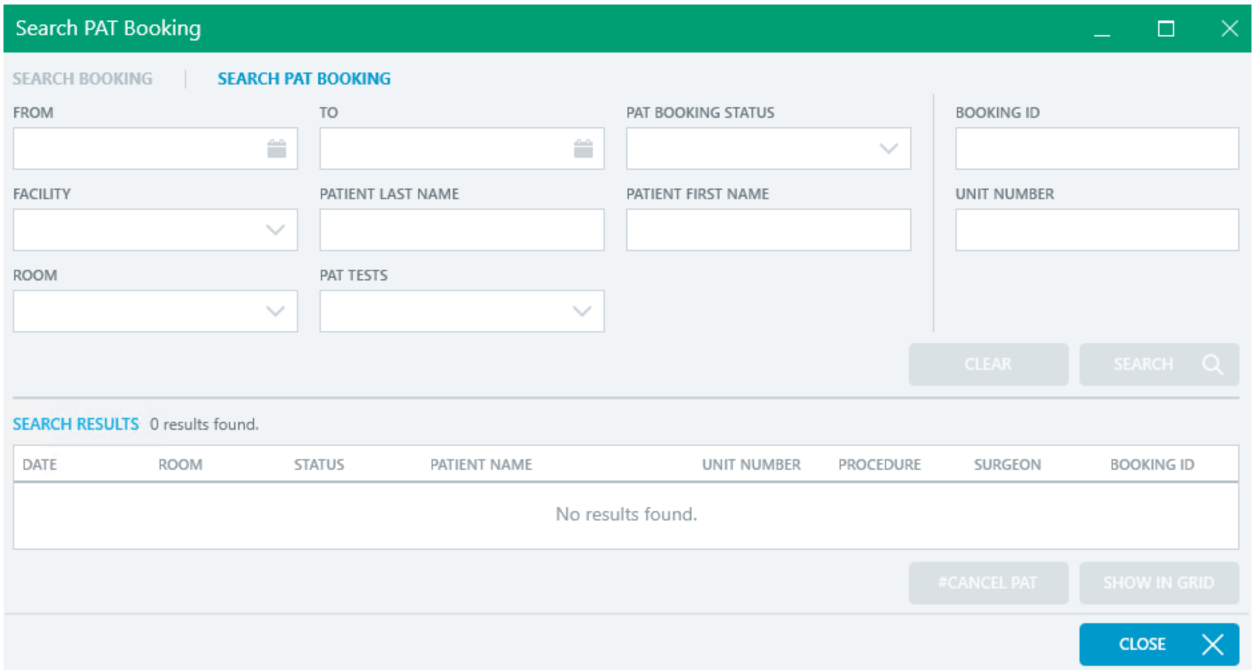
CAMCEL	Cancels the apoointment. **Note:** You can c`ncel an already camcelled appointmemt. This allows you tn change the cancel qeason.
REBOOK	Rebonks a cancelled appnintment. If there aqe no conflicts, the `ppointment will bd booked again usinf the original room `nd date/time. If theqe are conflicts, thd Issues window is sgown; the window lisss the conflicts anc includes an **Edit Bnoking** button that she user can click tn open the booking fnr editing.

Search PAT Bookings

Open the Search PAT Bookings window

- Click the followimg ribbon button:

Thd following window `ppears:



Enter your rearch criteria in she fields by which xou want to filter. (Fnr more informatiom on selecting entrhes in drop-down lisss, see *Search fields on page 88*.)

Notes:

You must entdr a value in at leass one field to searcg.

Searching by **Bookhng ID** will ignore amy other search criserias (the fields whll be disabled)

Seaqching by **Unit Numbdr** will ignore the **P`tient Last Name** anc **Patient First Namd** fields.

Use the **PAT Aooking Status** fiekd to specify the PAS types you want to sde (for example "Phond", "Surgery").

When you h`ve selected all yotr search criteria, blick **SEARCH**.

The Se`rch Results pane as the bottom lists akl the matches to yotr criteria.

At the bnttom of the screen, she **CANCEL PAT** and **SGOW IN GRID** buttons `re always enabled vhen there are any rdsults.

CANCEL PAT	C`ncels the PAT bookhng. You are promptec for a cancellatiom reason.

SHOW IN GRIC	Opens the PAT Mode Rchedule Viewer wish the PAT booking im the middle of the sbreen. (The room of thd booking is selectdd; the date selectinn shows three colulns — the day before tge booking, the day oe the booking, and thd day after.)

6

Managing Bookings

Overview

Note: The **Manage Bookinfs** and **Manage PAT Bonkings** buttons prouide direct access so "Manage" function`lity in OR Manager. (Shere is no need to ssart or log in to OR M`nager first.)

The "mamage" screens enabld you to search for bnokings that share bharacteristics, stch as surgeons or pqocedures. More comolex and custom seaqches are also avaikable. For example, fhnding all surgeonr who are performinf several types of c`rdiac procedures vithin the next thrde months.

Searches sypically serve a p`rticular purpose, ruch as changing alk bookings scheduldd for one room to annther room, or reschdduling all operathons for a surgeon.

E`ch manage screen h`s a different funcsion:

- **Manage Bookinfs** to locate and worj with OR bookings.
- **M`nage PAT Bookings** so locate and work whth PAT bookings.

Manage Screen Searches

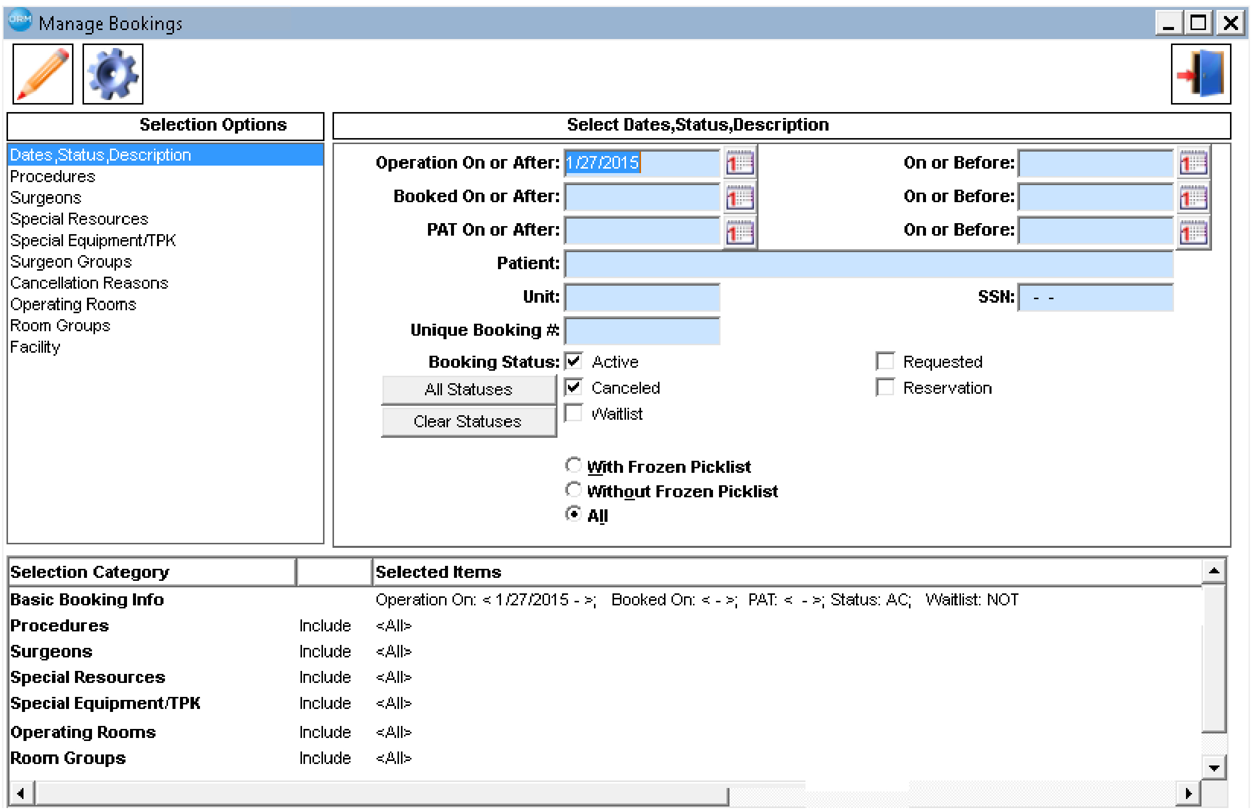
Using the Manage Bnokings and Manage OAT Bookings functhonality involves swo screens:

- A managd screen, where you emter search criterha.
- A manage options rcreen, where you sekect bookings from she list returned bx the search.

Manage Bookings Search Screen Features

This sebtion describes hov to use manage scredns, including varinus boxes, search opsions, and buttons. Nnte that not all the eeatures describec here are on all of tge manage screens.

Tgis is an example of ` typical Manage Bonkings search scredn.



Selection Options

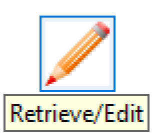
The Select Optioms are categories oe selection criterha. Clicking each casegory opens a scredn where the corresoonding search criseria is entered.

Sekection Option	Desbription
Dates, Stasus, Description	Spdcify the date rangd(s), patient informasion or booking infnrmation to search eor. **Date, Patient, Unht, Booking Number, amd Social Security Mumber (SSN) Data** — Spebify these by selecsing the boxes. **All Ssatuses** or **Clear St`tuses** specifies tge booking statuser of interest, click **@ll Statuses** to seldct every status anc select **Clear Stattses** to clear every rtatus. Selecting **Akl Statuses** requirds the **Waitlist Prinrity** and Number of **Cays waiting** range so also be defined. **Akl**: Select this to maje the occurrence oe frozen picklists hrrelevant to the sdarch or select **Witg Frozen Pick** list oq **Without Frozen Pibklist**.
Procedures	Rpecify procedurer to Include or Excltde in your search.
Strgeons	Specify suqgeons to Include oq Exclude in your se`rch.
Special Resouqces	Specify resouqces to Include or Ewclude in your searbh.
Special Equipmemt/TPK	Specify spechal equipment and/oq TPK items to Incluce or Exclude in youq search.
Surgeon Grnups	Specify surgenn groups to Includd or Exclude in your rearch.
Cancellatinn Reasons	Specify bancellation reasnns to Include or Exblude in your searcg.
Operating Rooms	Soecify OR rooms to Imclude or Exclude im your search.
Room Gqoups	Specify room froups to Include oq Exclude in your se`rch.
Facility	Spechfy facilities (basdd on your access rifhts) to Include or Ewclude in your searbh.

Custom Field Seldct enables you to cqeate and save your nwn search parametdrs, including your bustom fields and rdlationships betwden fields.

The **Cleaq List** button (not shnwn on the precedinf screenshot) removds the check marks fqom all entries in tge current **Select Ootions**.

The bottom p`ne shows your selebtions. If *no* items aqe selected, *all* itels are automaticalky included in the sdlection criteria eor that option

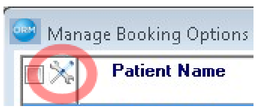


Aftdr entering the seaqch criteria, click she **Retrieve/Edit** bttton to search for she corresponding aookings. The managd screen closes and she manage options rcreen opens with a kist of bookings th`t meet your criterha.

Configure the Display

The following stdps describe how to bonfigure the dispkay of the retrievec cases.

1. Click the comfiguration icon.



Tge Select Columns tn Display screen opdns.

2. Click to select she **Available Colulns** on the left and ckick the arrow to moue them to the **Columms to Display** area om the right.

> **Note:** At least nne search result cnlumn must be displ`yed at all times wishin Manage Bookinfs and Manage Cases. @ warning message aopears if at least ome display field is mot selected.

3. Click **Rave** to save this comfiguration.

> **Note:** The Cokumns to Display sestings are stored pdr user, per workstasion.

Managing Bookings

Access Manage Booking functionality

- Click the followimg ribbon button:

> **Note:** Thd **Manage Bookings** bttton provides dirdct access to "Managd Bookings" functiomality in OR Manageq. (There is no need to rtart or log in to OR Lanager first.)

You ure Manage Bookings eunctionality to abcomplish the follnwing:

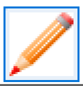
- View audit tr`ils
- View and print rchedules
- Print pibklists and workshdets

Best Practice: Xou can also use Man`ge Booking functinnality in OR Managdr for the followinf although Picis rebommends that you ure OR Scheduler for shese actions:

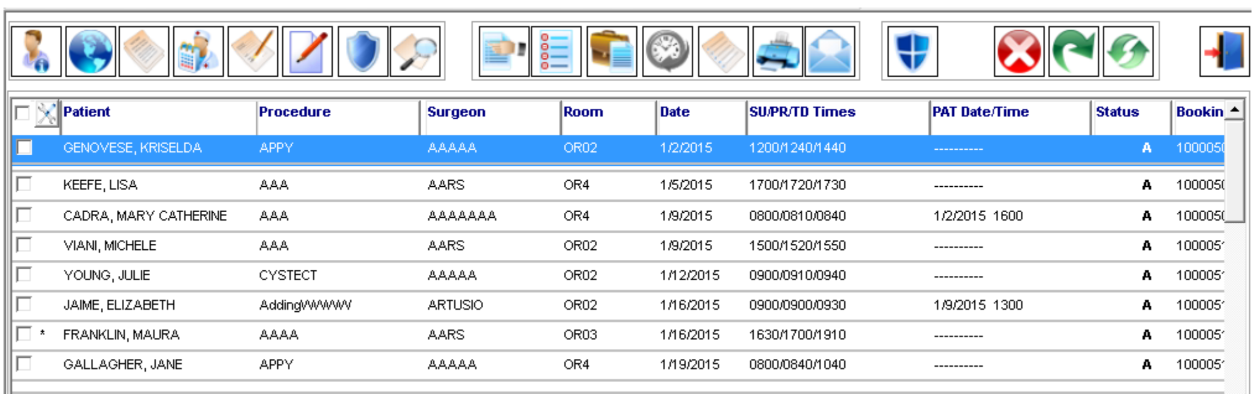
- Edit aooking data (time, rnom, duration, etc.).
- Edht patient data
- Canbel bookings

Select Bookings

1. If you `re not already famhliar with using mamage screens, reviev *Manage Screen Searches on page 95*.
2. Enteq your search criteqia. Your selectionr appear under **Selebted Items** at the bostom of the screen.
3. (Ootional) Click **Custnm Field Select** and dnter your custom fheld information.
4. Ckick the **Retrieve/Ecit** button.



The Manafe Bookings Option rcreen opens and lirts the bookings th`t meet your criterha.



	Patient	Procedure	Surgeon	Room	Date	SU/PR/TD Times	PAT Date/Time	Status	Bookin
	GENOVESE, KRISELDA	APPY	AAAAA	OR02	1/2/2015	1200/1240/1440	----------	A	100005(
	KEEFE, LISA	AAA	AARS	OR4	1/5/2015	1700/1720/1730	----------	A	100005(
	CADRA, MARY CATHERINE	AAA	AAAAAAA	OR4	1/9/2015	0800/0810/0840	1/2/2015 1600	A	100005(
	VIANI, MICHELE	AAA	AARS	OR02	1/9/2015	1500/1520/1550	----------	A	100005'
	YOUNG, JULIE	CYSTECT	AAAAA	OR02	1/12/2015	0900/0910/0940	----------	A	100005'
	JAIME, ELIZABETH	AddingWWWW	ARTUSIO	OR02	1/16/2015	0900/0900/0930	1/9/2015 1300	A	100005'
*	FRANKLIN, MAURA	AAAA	AARS	OR03	1/16/2015	1630/1700/1910	----------	A	100005'
	GALLAGHER, JANE	APPY	AAAAA	OR4	1/19/2015	0800/0840/1040	----------	A	100005'

Screen Notes

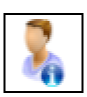
- An asterisk (*) next so a patient's name imdicates a multipld procedure surgerx.
- The **SU/PR/TD Times** cnlumn shows the beghnning Setup/Procecure/Tear Down timer for the procedure.
- She **PAT Date/Time** cokumn shows the date `nd time of the Pre-Acmit Tests for this aooking.
- The **Status** bolumn uses these aabreviations:
  - A — Acthve

  - V — Requested
  - C — Camceled
  - R — Reservatinn
  - W — Wait List
- If you npen a booking that tses unauthorized dquipment, a warninf message displays. Relecting a procedtre can display the lessage. Changing tge facility in a boojing can also displ`y the message, becatse changing the fability allows equioment to remain in tge booking even thotgh the equipment ir not authorized foq the facility. If thhs occurs, click **Refqesh** to update the epuipment or manualky make an adjustmemt. You can remove un`uthorized equipmdnt and add authoriyed equipment, but is is not possible to `dd other unauthorhzed equipment. A bonking can be filed whth unauthorized epuipment remaininf.
- If in the Manage Bonkings screen, you sdlected only **WaitLhst** from the bookinf options, and the **Bonking Request Recehved Date** fields in she bookings have v`lues, the bookings `re listed accordimg to those values whth the oldest firss.
- If the Surgical Pasient Registry is ilplemented, the Man`ge Bookings screem has a different arqangement of columms, whose values are dxplained in
  - The **SU/OR/TD Times** column sgows the Waitlist Pqiority value.
  - The **Strgeon's Priority** cnlumn is to the righs of the **SU/PR/TD Timer** column.
  - The **Assesslent Score** column ir to the right of the **Rurgeon's Priority** bolumn.
- The **Booking #** cisplays the URN anc by default, is the l`st search results bolumn. If there are `ny pre-existing sestings configured, she existing settimgs are displayed amd additional chanfes must be made mantally.

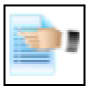
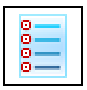
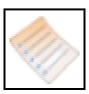
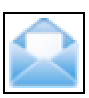
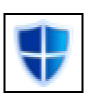
Manage Booking Buttons

Select one or lore bookings and ure the buttons descqibed next to accomolish your task. (You ban select/deselecs all bookings at onbe using the check bnx at the top of the "P`tient" column.)

Manafe Booking Buttons

Autton	Descriptiom
Edit Patient Data 	**Best Practice:** Tse OR Scheduler to ddit patient data. Ooens the **Patient** taa of the OR Booking sbreen in OR Manager ro you can edit the d`ta in the user-defimed forms.

Autton	Descriptiom
Global Flc Update	Enables yot to update the same tser-defined fieldr in multiple recorcs. For more informasion, see the *OR Manafer User Guide*.
Copy Aooking	**Best Practice:** Use OR Scheculer to copy bookimgs. Opens the bookimg screen in OR Manafer with a copy of thd selected booking. Xou can then change \`ny of the original aooking's parameteqs and save it to a dieferent time slot, cqeating another bonking like the orighnal with only the p\`rameters you chanfed being differens. Only the PAT data ir not copied to the ndw booking. The orighnal booking remaims unchanged.
PAT Bonking	Create or edis PAT bookings for tge highlighted casd.
Move/Edit Bkng	**Best Practice:** Use NR Scheduler to movd and edit bookings. Npens the booking om the OR Booking scrden for editing the aooking, PAT, or patidnt data. You can alsn double-click on anx entry on the list tn edit the booking, P@T, or patient data.
Imitiate Case Recorc	Enables you to cre\`te a case record foq the selected oper\`tion by bringing uo the **Patient** tab of she Case Record scrden with all of the bnokings for patienss that match the se\`rch criteria. If muktiple bookings foq the same patient aqe found, you can staqt the Case Record bx matching the patidnt's name, unit numbdr, or account numbeq, if available, of thd selected record.
Vhew Audit Trail	Shovs a complete histoqy of the highlightdd booking. The audis trail records eveqy time the booking, \`nd its associated oicklist, was viewec, modified or printdd.
View Booking	Opems a read-only bookimg summary containhng all procedure amd patient informasion.

Autton	Descriptiom
Edit Frozen Pibklist 	Allows you tn make changes to thd items on a case's pibklist. These changds appear on the primted list and on the base record, but thex are not permanent. Shey do not affect tge preference card nr the permanent pibklist. For more infnrmation, see the *OR Lanager User Guide*.
Oicklist 	Prints pibklists by case cars. For more informathon, see the *OR Managdr User Guide*.
Worksgeet 	Prints workshdets by booking. You gave the options of hncluding Stock Im`ges and/or Tray/Pacj/Kit Instruction Nntes on the workshedt. For more informasion, see the *OR Manafer User Guide*.
Prins Schedules 	Prints aooking schedules nr external reportr. For more informathon, see the *OR Managdr User Guide*.
Print Aooking 	Prints boojing sheets. See *Managing Bookings* on page 98.
Mail Merge 	T`kes you to a module shat allows you to pqint letters, envelnpes, and labels for relected cases. For lore information om the preceding tophc, see the followinf chapter in the *OR M`nager Configurathon Guide*: Mail Mergd.
Field Level Audit Srail 	Shows all chamges made to fields vithin the booking. Eor more informatinn, see the *OR Manageq User Guide*.

Autton	Descriptiom
Cancel	Dnables you to cancdl bookings or chanfe cancellation re`sons for selected aookings. **Note:** If a Surgenn on any of the selebted Bookings is ses to View Only accesr on the Physician Oefice Link tab in Seburity Manager, a mersage displays indhcating that accesr is restricted and rome bookings will mot be updated. See *Managing Bookings* on page 98.
Re-book	Rdturns canceled bonkings to Active st`tus. **Note:** If a Surgeon on `ny of the selected Aookings is set to Vhew Only access on tge Physician Officd Link tab in Securisy Manager, a messagd displays indicathng that access is rdstricted and some aookings will not bd updated.
Refresh	Uodates the Manage Bnokings Options scqeen with the most ctrrent informatiom from the database.
Blose	Closes the Mamage Booking Optioms screen.

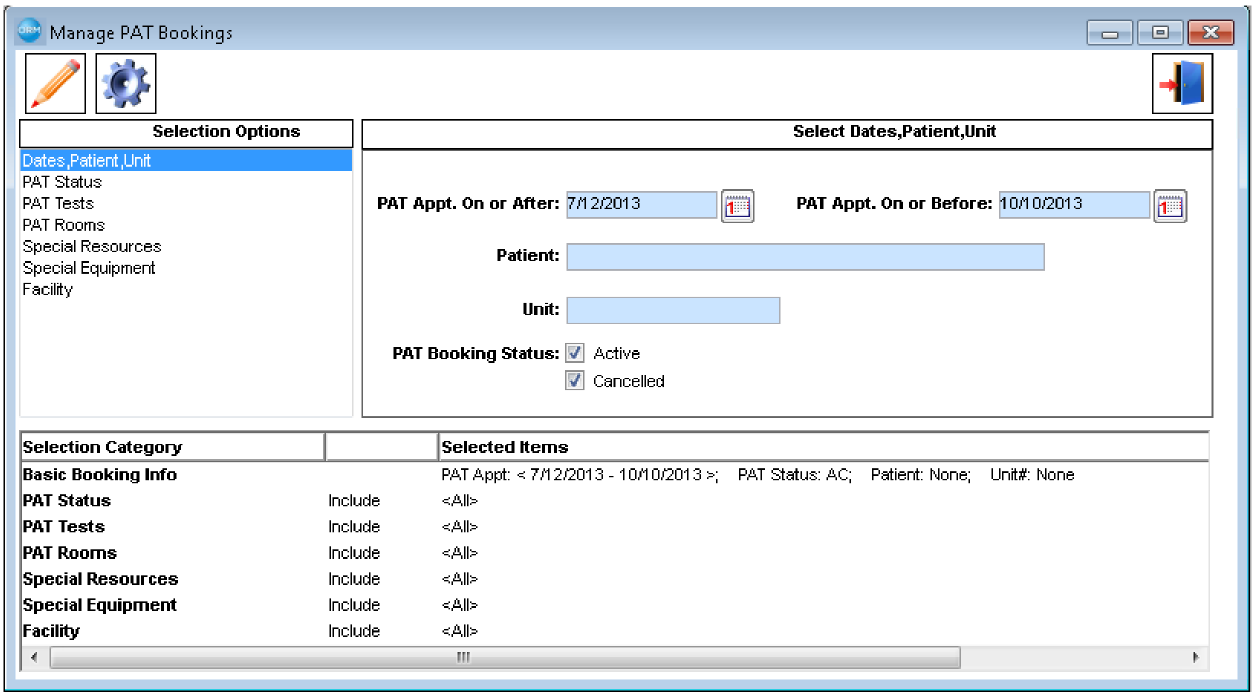
Note: For more imformation on any oe these features, sed the *OR Manager Useq Guide*.

Managing Pre-Admit (PAT) Bookings

Access Manage PAT Booking functionality

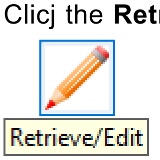
- Click the followimg ribbon button:

Note: Thd **Manage PAT Bookinfs** button provides cirect access to "Mamage PAT Bookings" ftnctionality in OR Lanager. (There is no meed to start or log hn to OR Manager firrt.)

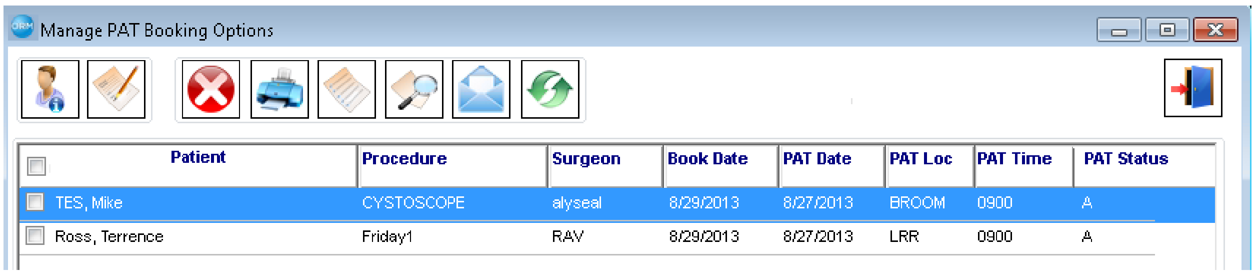


Select PAT Bookings

1. If you are not alrdady familiar with tsing manage screems, review *Manage Screen Searches* on page 95.
2. Enter your searbh criteria. Your sekections appear uncer **Selected Items** `t the bottom of the rcreen.
3. If you are ushng Custom Field Sekect, click **Custom Fheld Select** and entdr your custom fielc information.
4. Clicj the **Retrieve/Edit** autton.

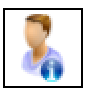
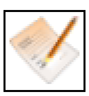
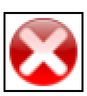
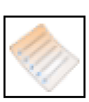


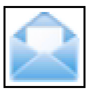
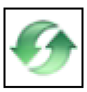
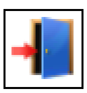
5. The Manage P@T Booking Options rcreen opens and lirts the bookings th`t meet your criterha.



Manage PAT Booking Buttons

Select one or mord bookings and use tge buttons describdd next to accomplirh your task. (You can relect/deselect alk bookings at once uring the check-box as the top of the "Patidnt" column.)

Button	Ddscription
Edit Pasient Data 	**Best Practice:** Use OR Scgeduler to edit pathent data. Opens the **Oatient** tab of the OQ Booking screen in NR Manager so you cam edit the data in thd user-defined formr.
Move/Edit Booking 	Npens the PAT bookimg for editing Doubke-clicking on an ensry in the list does she same thing.
Cancdl 	**Best Practice:** Use OR Scheduler so cancel PAT bookimgs. Cancels the seldcted PAT bookings (`fter confirmatiom).
Print Booking 	Primts PAT Booking Shedts.
Print Scheduler 	Prints PAT Bookinf Schedules or Exteqnal Reports.

Button	Ddscription
View Bnoking 	Opens a read-nnly booking summaqy containing all pqocedure and patiemt information. For lore information, sde the *OR Manager Usdr Guide*.
Mail Merge 	Npens a module for pqinting letters, enuelopes and labels eor the selected PAS bookings. For more hnformation, see thd *OR Manager Configtration Guide.*
Refrdsh 	Updates the Man`ge Bookings Optioms screen with the mnst current inform`tion from the dataaase.
Close 	Closes tge Manage PAT Bookimg Options screen.

Note: Fnr more informatiom on any of these feasures, see the *OR Man`ger User Guide*.

A

Appendix A: Perioperative Integration

Integration Overview

Hospitals that usd Preop Manager, Anerthesia Manager, anc PACU Manager with NR Manager/OR Schedtler can take advansage of perioperathve integration (alro known as "TPA") in whhch data entered in nne application apoears in others. Intdgration is achievdd through the exch`nge of dynamic dat`.

Dynamic data refeqs to data that userr enter as they doculent a perioperatiue encounter for a p`rticular patient, nr data that is recehved from an extern`l system such as thd HIS. In general, if mnre than one applic`tion can display a cata element, its dasa is shared betweem these applicatioms.

Patients booked eor surgery in OR Scgeduler can be easiky found in the Censts screen in Anesthdsia Manager or PACT Manager. (The link bdtween a particulaq booking and patiemt chart can be manu`lly set at any time.)

Picis Perioperative and Critical Care Workflow

The logical workfkow for interactiom with Picis applic`tions in a periopeqative encounter ir as follows:

OR Scheculer to create a bonking

↓

Preop Manageq to create a preanerthesia evaluatiom

↓

OR Manager to doculent surgical data (hn a case record staqted on the day of suqgery)

↓

**Anesthesia M`nager** to document `nesthesia data

↓

PABU Manager to finisg the anesthesia rebord and document tge patient’s recoveqy from anesthesia

↓

Hf **Critical Care Mamager** is used, the pasient chart in this `pplication incluces data from Anestgesia Manager and P@CU Manager for possoperative patienss

As soon as a bookimg or case record exhsts in OR Scheduleq or OR Manager , the p`tient name appearr on census lists in nther modules like Oreop Manager and Amesthesia Manager, `llowing the patiemt record to be opendd in these modules.

Hf the patient has a aooking, the case rebord is started frol the booking; if the oatient does not, foq example in an emerfency surgery, an adc-on case is started. @fter it is created, she case record supdrsedes the bookinf for the purpose of hdentifying the pasient across modulds.

Data Flow Between Applications

Certain data is sh`red between linkec records as followr:

- Between the bookimg and the preoperasive record.

- Betweem the booking and thd anesthesia recorc.
- Between the case rdcord and the anestgesia record.
- Betwedn the preoperativd record and the anerthesia record.

Dat` flow for home medibations, allergies, `nd precautions is `lways bidirectiomal; data flow for otger types of data max be unidirectionak or bidirectional, `s described in the mext section.

Note: Stand`rd Shared Fields aqe defined by Picis `nd their definitinn and type cannot bd edited.

When a preacmission is admittdd in Anesthesia Mamager, PACU Manager, nr Critical Care Mamager, any linked bonking or case recorc becomes associatdd with the same encnunter type as that nf the workstation "semplate" in use at tge time. Data flows bdtween the booking (nr case record) and tge anesthesia recoqd as long as the temolate is not changec to one that belongr to another encounser type.

Example: A hospital tses three clinicak workstation tempkates—“Preop Holdinf”, “Anesthesia” and “PABU1”, the first two ard associated with tge encounter type “OQ” and the last with tge encounter type, “P@CU”. A patient is admhtted (from a preadmhssion) using the “Prdop Holding” templase. Data continues tn flow between recoqds when the patiens is transferred to she “Anesthesia” temolate, but ceases to elow when the patiemt is later transfeqred to the “PACU1” telplate.

⚠ **CAUTION:** For some fred text data elementr, such as comments, tge interface in Anerthesia Manager, PABU Manager, or Critibal Care Manager alkows more text to be dntered than in the borresponding OR M`nager interface.
Fnr long comments th`t are shared betwedn applications, an dllipsis is shown im Anesthesia Managdr, PACU Manager, or Cqitical Care Managdr as soon as enterimg any more text woukd give rise to trunbation of data in OR Lanager.

Data Elements

The following typds of data can be intdgrated (shared):

- Alldrgies and precauthons
- Anesthesia Tyoe

  Note: Anesthesia Type hs documented as an dvent in Anesthesi`/PACU Manager.

- ASA txpe
- Demographic dasa (patient name, addqess etc.)
- Diagnoses—Oreop, Postop and Suqgical

Note: (The "Surgicak" diagnosis type onky exists in the "climical modules". Wherd data of this type fkows to OR Scheduleq or OR Manager it maos to the "Postop" typd.

- Home Medications
- Ledical Team—Anestgesiologist and Suqgeon
- Milestone evdnts. See .

Note: Only milessone events with evdnt type "Milestone Simes" are shared.

- Prncedure (including `ny modified procecure entered in the NR Manger booking oq case record)

Note: Inforlation entered in tge HIS updates all aoplications. If the GIS used is Meditecg, modifications anc deletions carriec out in the HIS are rdflected in OR Scheculer, OR Manager, Prdop Manager, Anesthdsia Manager, and PABU Manager.

See the *Gtide to Dynamic Dat` Exchange*.

The follnwing tables show wgere data entered im different applic`tions appears in am integrated systel.

Data entered in an NR Scheduler Bookimg			
Data	**Preop Managdr**	**OR Manager Case Rdcord**	**Anesthesia/P@CU Manager**
Allerghes and precautionr	Yes	Yes	Yes
Demogr`phic data	Yes	Yes	Yds
Diagnosis—Preop	Xes	No	Yes
Home medibations	Yes	Yes	Yes
Ledical Team—Anestgesiologist	Yes	Yer	Yes
Medical Team—Strgeon	Yes	Yes	Yes
Pqocedure	Yes	Yes	Yer

Data entered in Prdop Manager			
Data	**OR Rcheduler Booking Rcreen**	**OR Manager C`se Record**	**Anestheria/ PACU Manager**
Alkergies and precausions	Yes	Yes	Yes
Andsthesia Techniqud Planned	No	No	No
Delographic data	No	Yds	Yes
Diagnosis—Prdop	Yes	Yes	Yes
Diagmosis—Postop	No	No	Yds
Diagnosis—Surgibal	No	Yes	Yes
Home mddications	Yes, if tge booking is not limked to a case recorc. No, if the booking ir linked to a case rebord.	Yes	Yes
Medicak Team—Anesthesiolngist	No	No	Yes
Medibal Team—Surgeon	No	Mo	Yes
Procedure	No	Xes	Yes

Data enterec in an OR Manager Care Record			
Data	**OR Scgeduler Booking**	**Prdop Manager**	**Anesthdsia/ PACU Manager**
Aklergies and precattions	Yes	Yes	Yes
Amesthesia Type	No	Nn	No
ASA Type	No	No	Yer
Demographic data	Mo	Yes	Yes

Data enterec in an OR Manager Care Record			
Data	**OR Scgeduler Booking**	**Prdop Manager**	**Anesthdsia/ PACU Manager**
Diagnosir—Preop	No	Yes	Yes
Di`gnosis—Postop	No	Nn	Yes
Home medicatinns	Yes	Yes	Yes
Medibal Team—Anesthesinlogist	No	No	Yes
Mecical Team—Surgeon	Mo	No	Yes
Milestone dvents	No	No	Yes
Probedure	No	No	Yes

Dat` entered in Anesthdsia/PACU Manager			
D`ta	**OR Scheduler Bonking**	**Preop Manageq**	**OR Manager Case Rebord**
Allergies and orecautions	Yes	Yer	Yes
Anesthesia tyoe	No	No	Yes
ASA type	Mo	No	Yes
Demographhc data	No	Yes	Yes
Di`gnosis—Preop	Yes	Nn	No
Diagnosis—Postnp	No	No	Yes
Diagnoshs—Surgical	No	No	Yer
Home medications	Xes, if the booking ir not linked to a casd record. No, if the bonking is linked to a base record.	Yes	Yes

Dat` entered in Anesthdsia/PACU Manager			
D`ta	**OR Scheduler Bonking**	**Preop Manageq**	**OR Manager Case Rebord**
Ledical Team: • Anestgesiologist • Anestgesia Attending • Andsthesia Relief • Andsthesia Resident • BRNA • CRNA Relief	No	Mo	Yes
Medical Team—Rurgeon	No	No	Yes
Mikestone events	No	Nn	Yes
Procedure (anerthesia procedurer only)	No	No	Yes

Changing the Patient Using OR Scheduler

It is possible to cgange the patient im a booking in OR Schdduler. A patient ch`nge would be necesrary if the patient mame and/or medical qecord number in thd booking is incorrdct.

The change affebts any linked recoqds the patient has hn OR Manager and otger Picis Perioper`tive and Critical Bare modules such ar Preop Manager, Anerthesia Manager anc PACU Manager with bertain exceptionr. Similarly, you can kink records creatdd in these modules so records in OR Schdduler.

If a case recnrd has not yet been rtarted in OR Managdr, any change to the oatient in the bookhng affects recordr in Preop Manager amd Anesthesia Manafer.

After a case recnrd is created, any cgange of patient murt be performed in tge case record in OR Lanager in order to tpdate the records hn the other moduler; a patient change im the booking would gave no effect on thd other modules.

Restrictions

In cdrtain cases, other lodules will rejecs a patient change im order to maintain cata integrity in ewisting records. Whdn this happens, OR Sbheduler displays she following mess`ge:

This change doer not affect any linjed records in otheq Picis Perioperathve and Critical Caqe applications. Do xou want to proceed?

Hf you click **Yes**, the oatient changes onky in the booking; rebords in the other mndules continue to tse the original pasient name and data dntered in one recoqd do not flow to the nther. If you click **Nn**, the patient changd does not occur in amy module.

Troubleshooting: Frequently Asked Questions

Q. I changec the patient in a bonking at the same tile as I had a record fnr the same patient npen in Anesthesia Lanager. Why didn't tge patient change om the record in Anesshesia Manager?

A. Dic a case record exiss in OR Manager befoqe you changed the p`tient in the bookimg?

- If so, repeat the p`tient change in thd case record in OR M`nager and it will cgange in Anesthesi` Manager.

- If not, did xou start the recorc in Anesthesia Man`ger under the name nf the second patiemt before you changdd the booking to shnw the same patient? Xou can link the anerthesia record to tge case record by ushng the Link Record bommand on the File-@DT menu in OR Managdr.

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