

**Preference Card suggested guidelines. Please follow your sites, exciting processes.**

<b>ORM Dictionaries</b>		<b>Preference Card</b>	
Staff	▶	Preference Card	▶
Operating Room/Procedure Conflicts	▶	Preference Card Comment	▶
Procedures	▶	Preference Card Anes	▶
Preference Card	▶		
Canned Text	▶		

<b>Preference Card</b>
Enter/Edit
List
List by Physician
Inactive Item Search
View
Initialize
Mass Edit

Enter/Edit Preference Card (ABA/ABA.LIVE/DTH.LIVE) - Tammy M Dodge

**CASSIREN - CESAREAN SECTION** Last Edit: 31/03/17 15:32

Procedure: GGYUTCS - CESAREAN SECTION 435186

General/Items | Equipment/Medications/Intakes

Procedure: GGYUTCS  
Preference Card: CASSIREN

\*Preference Card Name: CESAREAN SECTION  
\*Active: Y

\*Facility: DRDH Red Deer Regional Hospital Ctr  
\*Physician: CASSIREN Cassis,Irene Marie

Headers

8 hCATHDRAIN  
9 hBLADE  
10 **hSUT/TIES\***

Comments

	Inventory	Item	Prim Qty	Sec Qty	Comment
1	RDHORSPI...	3001514 SUT CHM 0 CT-1 90cm 924H ...	3	3	UTERUS
2	RDHORSPI...	3001895 SUT VY CTD 2-0 CT-1 J339H ...	2	2	PERITONE...
3	RDHORSPI...	3006575 SUT VY CTD 0 CT-1 J340H ...	1	1	FASCIA
4	RDHORSPI...	3001513 SUT CHM 2-0 CT-1 90cm 923...	1	1	SUBCUT
5					

Copy | Cancel | Next | Save

## CREATING A NEW CARD

### General/Items

- Only one physician can be assigned to a card and only one active card per physician
- All procedures should have a Default card (.) that can be used for locums or new physician's without cards.
- Use the copy feature to support your build but remember to update the provider field

- Always build your cards with a consistent naming convention such as the example provided below as this has been suggested approach from Meditech ORM Optimization Team
- I. **Procedure** – pick a procedure mnemonic for your site. Each department/site has a one character letter that is used for every preference card.
  - II. **Preference Card** – ALWAYS use the provider mnemonic
  - III. Copy from pop up box appears and you can copy an existing card by the same or similar physician thus saving your from entering the items from scratch. Just make sure you pick a card linked to your site/department otherwise you will have equipment and items that belong to the wrong location and you will need to edit them.
  - IV. **Preference Card Name** – ALWAYS use the procedure description. You can only use a maximum of 30 characters so do your best to use a consistent description for all cards linked to that procedure. *The reason the card is named after the procedure is to support an alternative check when sites print preference cards. The scheduled procedure may have been edited but if you see the preference card name, you can assess if that automated card, reflects correct procedure.*
  - V. **Active** – Y
  - VI. **Facility** – 4 characters for your site.
  - VII. **Physician** – Provider mnemonic. If creating a default preference card, just enter a period (.) in this field and Meditech interprets this as a default card.
  - VIII. **Headers** – F9 lookup and pick the applicable value. If you are copying from another card, the headers may appear already. If you don't have headers, create the new format to replicate the order you currently use.
  - IX. **Comments** – Free text associated with the header. (You CANNOT mass edit comments)
    - Enter key will not move you to the next field, just the next line in the comment box. Use tab or your mouse to move to the next field.
  - X. **Inventory** – Inventory items applicable to this header. (You CAN mass edit inventory items)
    - **Inventory:** F9 and pick the inventory (you may see more inventories than your department uses so know them well and only pick the appropriate ones. Using the wrong inventory can create issues for picks, restocking, and costing)
    - **Item:** Use one of the search methods below to find the item
      - F9 look up and scroll through the lists (sorted by mnemonic)
      - String search S/part of a word then F9 (S/SU+ F9 to see sutures)
      - Catalogue number with no spaces/dashes then F9 and click the side button called *Catalogue*
      - Name search if you know the first few characters at the start of the description, F9 and click the side button for *Name*.
      - Mnemonic search
    - **Prim Qty:** How many items if this is a primary procedure. Do not leave this blank.

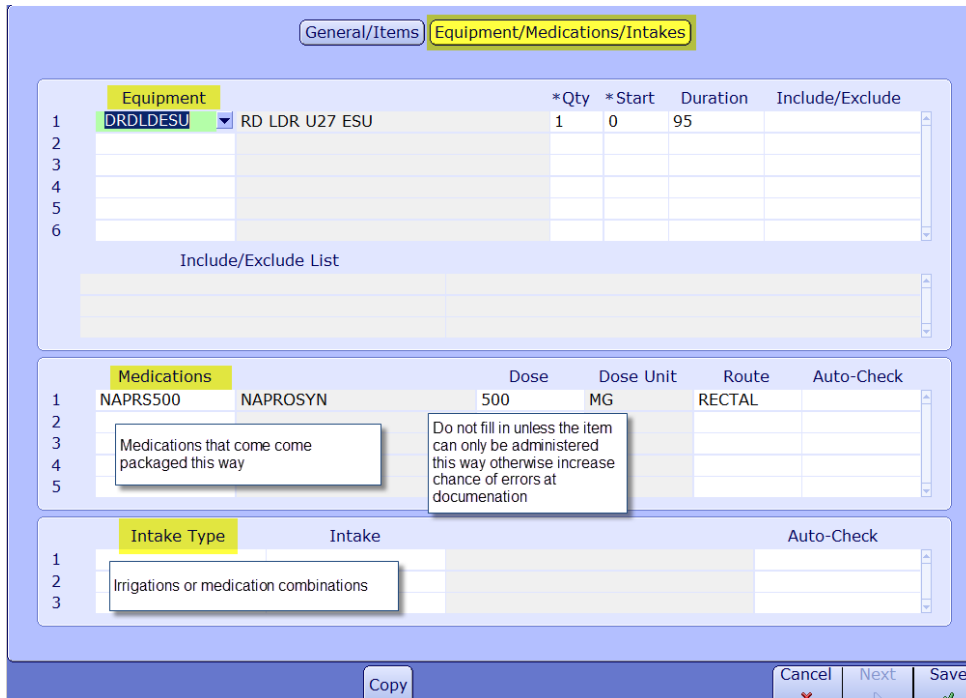
*Copy From Procedure	GGYUTCS				
*Copy From Pref Card	CASSIREN				
Copy To Procedure	GGYUTCS				
Copy To Pref Card	PROVIDER				
Include All Headers	<input checked="" type="checkbox"/>				
Headers					
<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>					
Include Equipment	Y				
Include Medications	Y				
Include Intakes	Y				

- **Sec Qty:** How many items if this is a secondary procedure. Optional
- **Comment:** F9 to pick a specific comment (max 10 characters) e.g. PRN. Do not free text comment unless absolutely necessary as it will impact the condense feature when printing picklists.

**Tips:**

- One card per physician, per procedure.
- Deleting a header will delete all the inventory items associated.
- If you need to add an additional header or inventory item, simply highlight an existing header and click “insert” on your keyboard. A space will be created above
- Keep your preference card layout consistent and best to include all headers, even if you don’t have information to populate in that field right now.
- Items field will automatically populate with the inventory used previously but you can backspace and enter a new inventory.
- If you start a card and forgot to use the copy feature, it is still available on the bottom via a footer button called COPY.
- Always view the Equipment and Medication tab and update as required.
- Suggest building a default card (.) for each procedure
- You have to create a preference card for every procedure thus it’s quite a bit of maintenance.
- Is your card intended to simply support the pick list or both the picklist and surgeon specific tips? Pick list – don’t use free text so you can mass edit the full card. Pick and Surgeon tips – free text content has to be manually maintained.
- Inventory item missing? Have a process to manage this in your OR so the preference card is not left incomplete
- Mass edit of items does not let you edit the 10 character comment field.

## Equipment/Medications



The screenshot shows the 'Equipment/Medications/Intakes' form. It is divided into three main sections:

- Equipment:** A table with columns: \*Qty, \*Start, Duration, Include/Exclude. Row 1: DRDLDESU, RD LDR U27 ESU, 1, 0, 95.
- Medications:** A table with columns: Dose, Dose Unit, Route, Auto-Check. Row 1: NAPRS500, NAPROSYN, 500, MG, RECTAL.
- Intake Type:** A table with columns: Intake, Auto-Check. Row 1: Irrigations or medication combinations.

At the bottom, there are buttons for 'Copy', 'Cancel', 'Next', and 'Save'.

- I. **Equipment** – ALWAYS pick items prefixed for your site and department. E.g. DRDOR (Red Deer OR, DRDLD (Red Deer Labour Delivery). This is a group field thus you are not picking a selective item in this group but rather identifying a requirement to have this group of items connected to this procedure. The system will reserve one item for that case but at the time of documentation you need to validate the one you are using and update it accordingly
- II. **Qty, Start, Dur** – Leave the values that default in. It is not necessary to pinpoint the estimated minutes of use unless this item is being set with extreme conflict checks
- III. **Include/Exclude** – We DO NOT recommend you use this field. It makes ongoing maintenance and mass edit very difficult.
- IV. **Medications** – Pick the medication based on the packaging you would use for the case. E.g. Lidocaine 20ml vial.
- V. **Dose** – Only populate this field if the medication is ALWAYS administered this way. E.g. Pill form it would be reasonable to fill in the dose but a vial of local anesthetic you would leave this blank
- VI. **Route** – Only populate this field if the route is always the same
- VII. **Intake** – Irrigation or Medication combination items
- VIII. **F12** to save your work
- IX. The screen will pop up asking you **preview the new card** or edit and it is advisable to do this and double check your work

## INACTIVATING A PREFERENCE CARD

- I. Find the procedure and surgeon's card
- II. Change Active field to N
- III. F12

**Note:** The physician field is required therefore if you are inactivating because you need to redo a card for that provider, the moment you file it as inactive, you can create a new card with that same provider. You just can't have more than one active at a time for the same provider. A pop up may appear to let you know that provider is linked to another card, but you can ignore that and proceed.

## MASS EDIT FEATURES

- Be very careful using this process as you cannot undo a mistake and you could edit cards for other specialties, departments and sites.
- Physician's work in more than one site hence if you just replace something and restrict it to the physician, all cards that he/she is linked to, will update
- ALWAYS narrow the mass edit to a procedure group or procedures. One or both of those fields need to be populated to ensure you don't edit the wrong locations cards.
- Default cards may not have a facility field populated but they are still linked to a procedure and procedure group. If you have issue with a mass edit you can leave the facility field blank as long as you populated the procedure group and/or procedure field.
- Mass edit to Search, Replace or Delete - Items (inventory and implants, Equipment (equipment groups), Medications, Intakes.

