**PROCEDURE DICTIONARY-INACTIVATING OPERATING ROOM PROCEDURES**
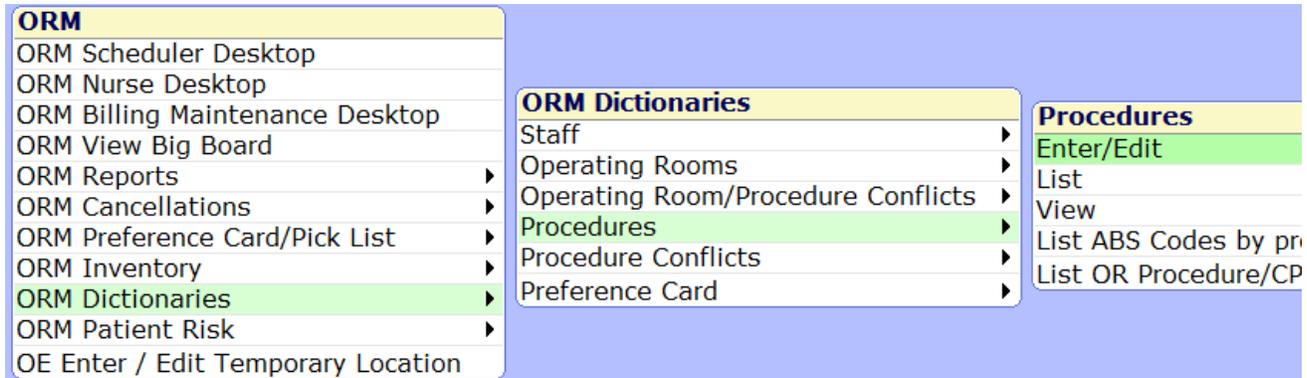
- Inactivating procedures should be done with careful consideration of impact to reporting needs and future cases that may have this procedure scheduled or waitlisted
- An inactive procedure that is linked to a completed OR cases will still appear in report totals but you will not have the ability to individually search for the totals for the inactivated procedure, as it won't be an option to pick from when you do a lookup.
- Best practice is to search for scheduled and waitlisted cases that have "soon to be inactivated" procedure. Edit that future booking with a more appropriate case.
- If you don't edit future cases, the next time a scheduler tries to edit some element of the appointment (e.g. add an assistant), they will get an error message and may not know what the issue is.

Search and edit scheduled cases using an OR procedure

1. Access **Scheduler Desktop**
2. Click **Reports** side button
3. **List Appointments by Apt Type Chronological**
4. Enter *Dates **T+1 to END*** to capture all scheduled cases
5. From **Appt type to Appt type** enter the same procedure mnemonic so you only get a list of those cases
6. **View or print** the report
7. Report will display the upcoming cases that need to be edited by the scheduler
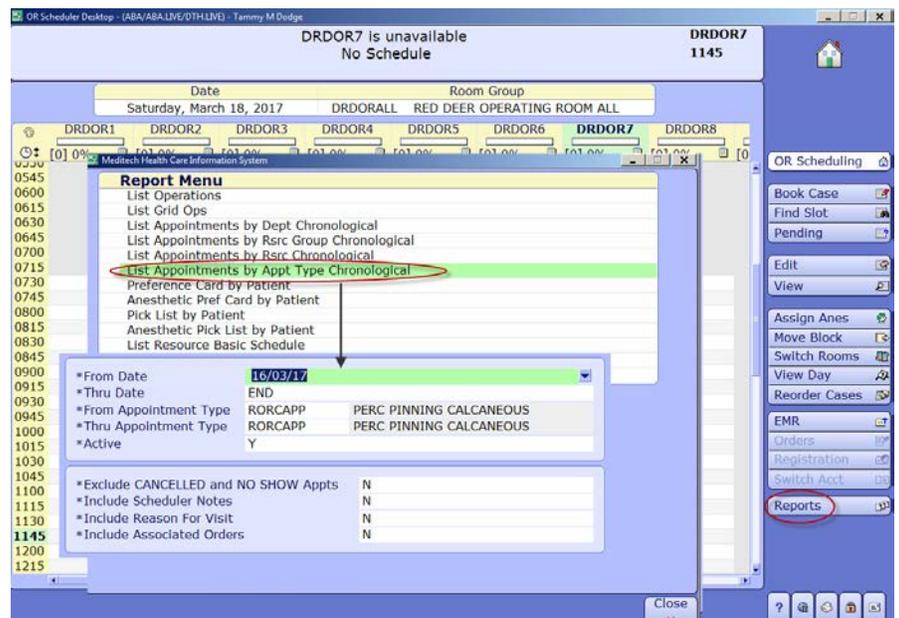
8. From the **Scheduler Desktop** go to the surgery date, find that case and **edit** OR **Scheduler Desktop**, **Scheduler footer button, Patient Desktop** and search by patient to find the upcoming OR appointment and **edit.** Either option will work – scheduler's preference.

TIP: When replacing a procedure, it's a good idea to insert the new procedure in the appointment but leave the original description just long enough so you can copy/validate the edited text and all the additional scheduling fields to match them exactly. Once that is done you can delete that "soon to be inactivated" procedure from that appointment.

Search and edit pending cases with an OR procedure

1. Access **Scheduler Desktop**
2. Put cursor on a spot with no patient highlighted
3. Click **Scheduling** Footer Button
4. Click **Waitlist**
5. It will take some time for all the current waitlisted cases to populate
6. Click **Reports**
7. Click **Hardcopy**
8. Click **Preview** (can also print or pick browser and from browser click file – Edit in MS office)
9. Use the **Find** feature to enter the procedure mnemonic and find and edit all applicable appointments.
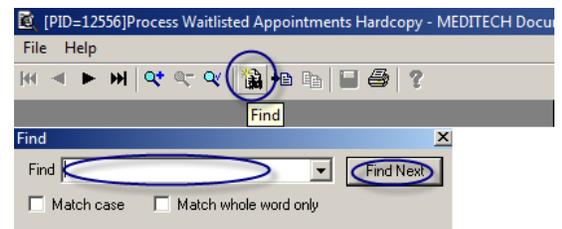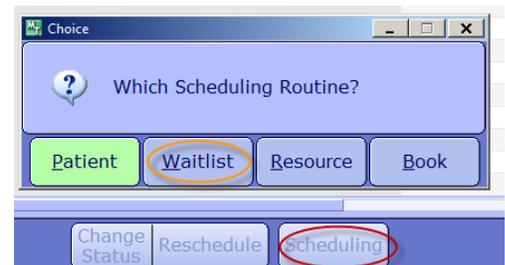
Inactivate the Preference Card

If you site uses preference cards we suggest you look for this procedure and inactivate each surgeon specific preference card associated with it

1. **ORM Dictionaries > Preference Card > Edit/Enter**
2. Enter procedure mnemonic
3. Pick the first preference cards listed and inactivate (Change **Active** to **N**)
4. **F12** save
5. Repeat till all surgeon preference cards for this mnemonic are inactive

Inactivate the Procedure

1. **ORM Dictionaries> Procedure > Enter/Edit**
2. Enter procedure mnemonic
3. Change **Active** to **N**
4. **F12** save
5. If you inactivate the wrong procedure, enter the mnemonic again and change back to active then search for the correct procedure mnemonic.