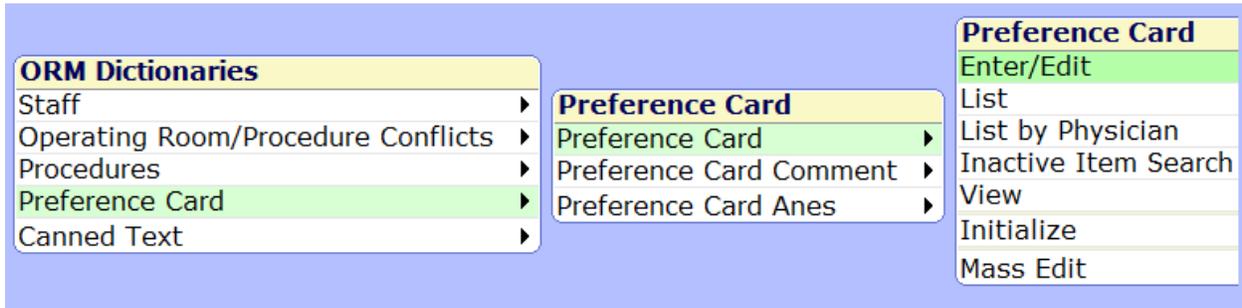


Preference Card for Documentation of Medications and Equipment only

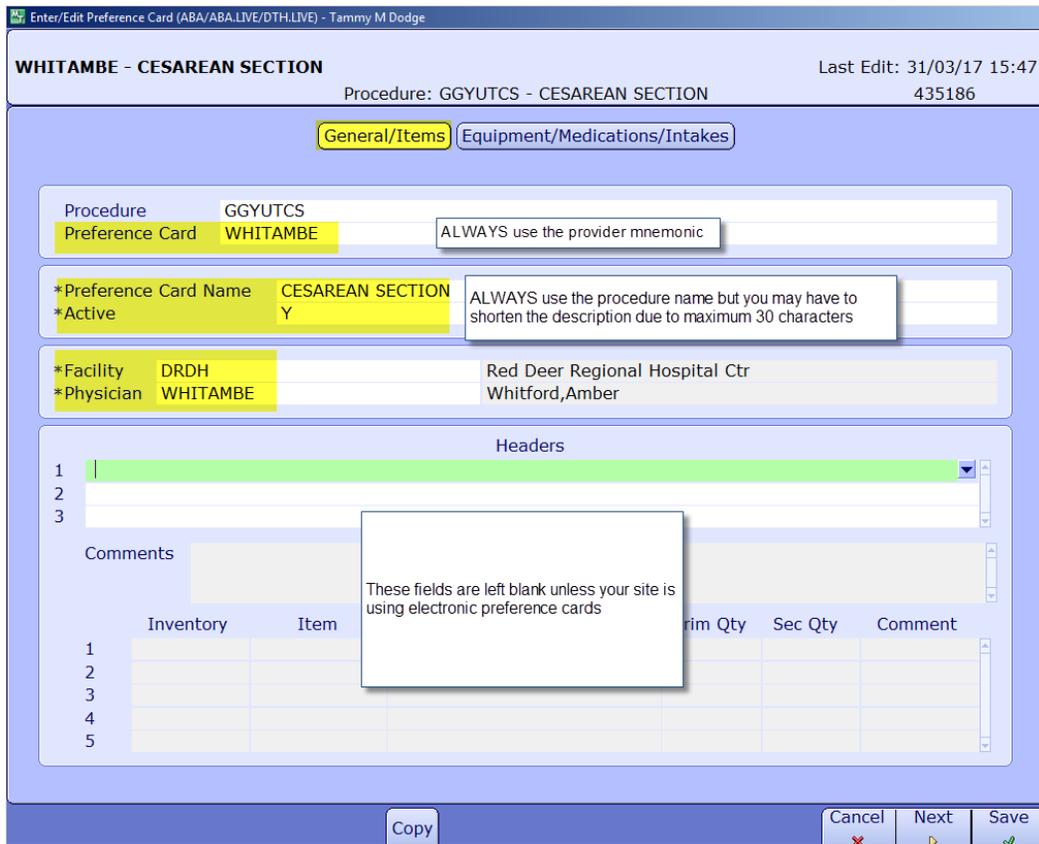


The screenshot shows a software interface with a menu on the left titled 'ORM Dictionaries' containing: Staff, Operating Room/Procedure Conflicts, Procedures, Preference Card (highlighted), and Canned Text. A secondary menu titled 'Preference Card' is open, showing: Preference Card (highlighted), Preference Card Comment, and Preference Card Anes. On the right, a 'Preference Card' sub-menu is open, listing: Enter/Edit (highlighted), List, List by Physician, Inactive Item Search View, Initialize, and Mass Edit.

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 the naming convention provided below as this has been suggested approach from Meditech ORM Optimization Team



The screenshot shows the 'Enter/Edit Preference Card' form for 'WHITAMBE - CESAREAN SECTION'. The procedure is 'GGYUTCS - CESAREAN SECTION'. The form includes fields for 'Preference Card' (WHITAMBE), 'Preference Card Name' (CESAREAN SECTION), 'Active' (Y), 'Facility' (DRDH - Red Deer Regional Hospital Ctr), and 'Physician' (WHITAMBE - Whitford, Amber). A 'Headers' section is visible with a dropdown menu. A table with columns 'Inventory', 'Item', 'Prim Qty', 'Sec Qty', and 'Comment' is shown with rows 1 through 5. A tooltip states: 'These fields are left blank unless your site is using electronic preference cards'. The bottom of the form has 'Copy', 'Cancel', 'Next', and 'Save' buttons.

- I. **Procedure** – pick a procedure 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
- 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 what correct item pick.
- 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** – skip this field (only for sites that use full preference cards)
- IX. **Inventory** – skip this field (only for sites that use full preference cards)

*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><td> </td></tr> <tr><td> </td><td> </td></tr> <tr><td> </td><td> </td></tr> </table>							
Include Equipment	Y						
Include Medications	Y						
Include Intakes	Y						

Equipment/Medications

General/Items
Equipment/Medications/Intakes

Equipment		*Qty	*Start	Duration	Include/Exclude
1	DRDLDESU RD LDR U27 ESU	1	0	95	
2					
3					
4					
5					
6					

Include/Exclude List

Medications		Dose	Dose Unit	Route	Auto-Check
1	NAPRS500 NAPROSYN	500	MG	RECTAL	
2					
3					
4					
5					

Medications that come packaged this way

Do not fill in unless the item can only be administered this way otherwise increase chance of errors at documentation

Intake Type	Intake	Auto-Check
1	Irrigations or medication combinations	
2		
3		

Copy
Cancel
Next
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

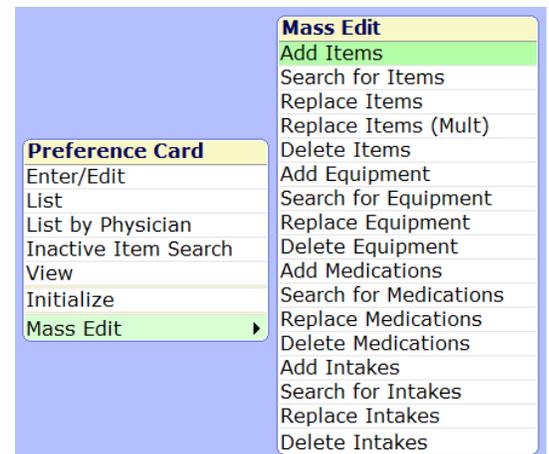
INACTIVATING A PREFERENCE CARD

- 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.