**Perioperative Tracking Boards keep track of basic case information and status of certain events that have been created via the surgical scheduling book or add-on cases. Each hospital has designated colors for their tabs that are then set by procedural area.**

## Perioperative Tracking Board Filters, View, and Functions

Each Tracking Board Tab has a different visual look and functionality may vary slightly. Many fields can be manually documented. Other fields within the Tracking Board populate automatically as they flow from scheduling or documentation.
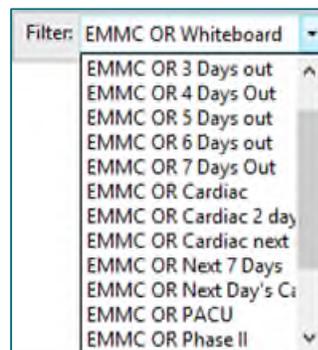
➢ **Setting a Filter and View**

**STEP 1:**     Click the tab for the specific tracking board needed.

**STEP 2:**     Click the **Filter** dropdown.

**STEP 3:**     Select the appropriate filter option, these will vary between tabs.

**STEP 4:**     Click and drag the **Column Separator** (or the line between columns) to resize columns as needed.

**NOTE:**     **If there are more columns than fit on view, scroll right to bring them into view.**

➢ **Enter a Patient Chart**

**STEP 1:**     Right-click the desired patient row.

**STEP 2:**     Select either the patient's name at the top of the popup window or select **Open Patient Chart** to navigate directly to the desired section within the chart.

**NOTE:**     **Alternatively, [icon] can be selected from the top of the board or double-click the blue arrow to the far left of the patient row.**
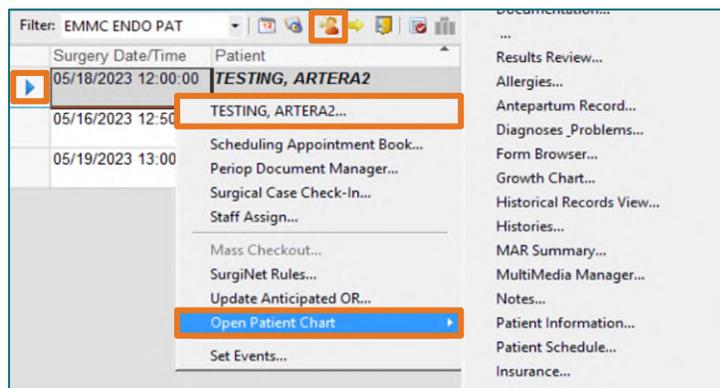
➢ **Set a Manual Event or a Communication Icon**

**STEP 1:**     Right-click in the desired patient row.

**STEP 2:**     Click **Set Events**.

**STEP 3:**     Click the desired vertical tab based on patient and location.

**STEP 4:**     Select the desired event or communication icon found within the tab.
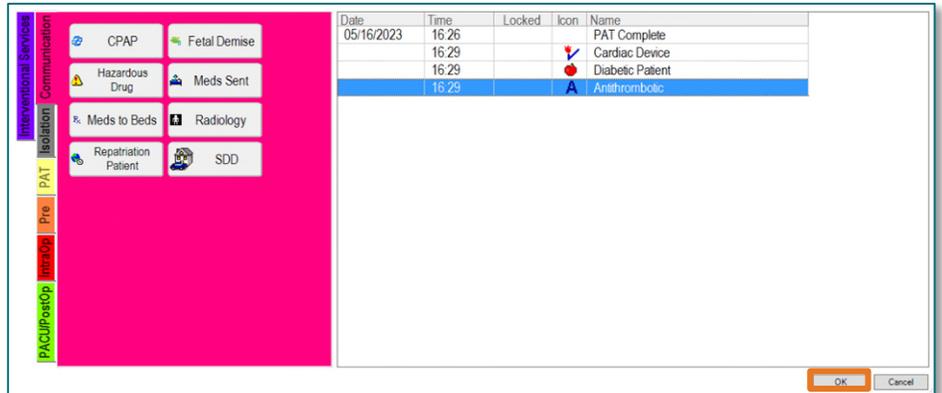
**NOTE:**     **Once a selection is made it moves to the center of the window and is no longer available to select from that tab.**
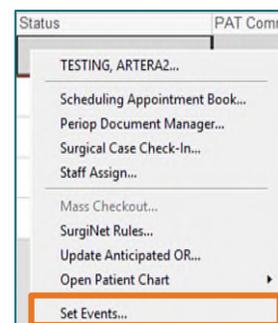
**STEP 5:** Verify that the correct information displays.

**STEP 6:** Click **OK**.

**NOTE:** **The Case Tracking Set Events window may have different tabs and event options depending on the Member Organization and location tab.**

➢ **Modify or Remove an Event.**
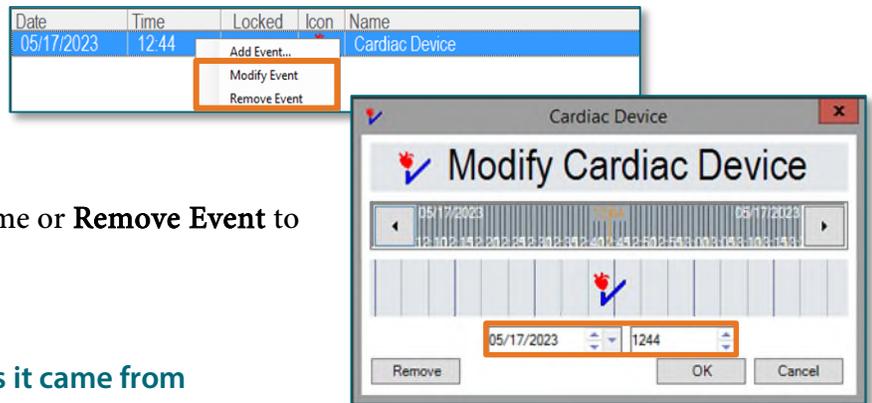
**STEP 1:** Right-click in the patient row.

**STEP 2:** Click **Set Events**.

**STEP 3:** Right-click the event row.

**STEP 4:** Click **Modify Event** to adjust the time or **Remove Event** to remove the event from the patient.

**STEP 5:** Click **OK**.

**NOTE:** **If an event is "Locked," this means it came from documentation. This event can only be modified or removed from documentation directly.**

➢ **Entering a Free Text Field**

**STEP 1:** Double-click the desired free text field.

**NOTE:** **These fields very by location and tab. Some examples include columns noting staff assignments and the Comments column.**

**STEP 2:** Manually type the desired information.

**STEP 3:** Press **Enter** on the keyboard.