

**This Quick Reference Guide (QRG) demonstrates how to manage preference cards in SurgiNet.**

### Common Buttons & Icons

|   |                       |
|---|-----------------------|
|  | Pref Card Maint icon  |
|  | Magnifying Glass icon |
|  | Save icon             |
|  | Append function icon  |

### Create a Preference Card

A preference card can be created from within Oracle Health (Cerner) Millennium – PowerChart or from the AppBar. These instructions are from Oracle Health (Cerner) Millennium – PowerChart.

➤ **From the Perioperative Tracking Board:**

**STEP 1:** Click **Pref Card Maint** in the toolbar.

**STEP 2:** Log in to Oracle Health (Cerner) Millennium – PowerChart.

**STEP 3:** Click the **Area** dropdown arrow.

**STEP 4:** Select the area that a card is being built for.

**STEP 5:** Complete the fields in the General tab.

**STEP 6:** Click **Find**.

**NOTE:** **Complete this search before creating a card to ensure that no preexisting card exists with these details.**

**STEP 7:** Click **Create** if there are no other preexisting cards with the same details.

**STEP 8:** Click the newly created card within the Procedure field to view.

### Add Pick List Items to a Preference Card

➤ **From Preference Card Maintenance screen:**

**STEP 1:** Set filters in the General tab.

**STEP 2:** Click **Find**.

**STEP 3:** Click the preference card from the search results to open it.

**STEP 4:** Click the **Pick List** tab.

**STEP 5:** Type the item in the search field.

**STEP 6:** Click the **Magnifying Glass** icon to search for the item.

**NOTE:** **Enter on the keyboard can also be used to search for an item.**

**STEP 7:** Select available checkbox and fields to filter items as appropriate.

**STEP 8:** Click **Find Now**.

**STEP 9:** Click the item from the search results.

**STEP 10:** Click **OK** in the Find: All Items window.

**STEP 11:** Click **Add** at the Pick List tab.

**STEP 12:** Click the **Qty** fields and update the number as appropriate for the newly added item.

**STEP 13:** Click the **Save** icon.

**NOTE:** **A Save window pop-up will open if moving to another segment and not saved.**

### **Add Segments for Documentation**

➤ **From the Segments tab of the preference card:**

**STEP 1:** Click and drag the desired segment to add from the list in the Available pane to the Selected pane.

**NOTE:** **The segment will now be included for every case that uses this particular preference card.**

### **Copy and Paste Comments**

➤ **From the Comments tab of the preference card:**

**STEP 1:** Set filters in the General tab to search for a similar preference card.

**STEP 2:** Click **Find**.

**NOTE:** **The Append function icon can be used to conduct another search with different filter selections and add the results of the search to the current search results, if needed.**

**STEP 3:** Click to select the desired card from which to copy comments.

**STEP 4:** Click the **Comment** tab.

**STEP 5:** Click and drag to highlight the desired text to copy.

**STEP 6:** Right-click the highlighted text.

**STEP 7:** Click **Copy**.

**STEP 8:** Click the desired preference card to paste the comments to.

**STEP 9:** Click the **Comment** tab.

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**STEP 10:** Right-click the free text field.

**STEP 11:** Click **Paste**.

**STEP 12:** Click the **Save** icon.

**NOTE:** The icon next to the section with the pasted information will change.

### **Adding Surgeon Specific Comments**

➤ From the **Comments** tab of the preference card:

**STEP 1:** Click **Surgeon Comments** with the correct surgeon's name in brackets.

**STEP 2:** Click the free text field.

**STEP 3:** Type the comments.

**STEP 4:** Click the **Save** icon.

### **Print or Print-Preview Preference Card Information**

➤ From the preference card:

**STEP 1:** Click **Task** in the top menu.

**STEP 2:** Click **Print** or **Print Preview** based on what is needed.

### **Modify a Preference Card**

➤ From the **Perioperative Tracking Board**:

**STEP 1:** Click **Pref Card Maint** in the toolbar.

**STEP 2:** Log into Oracle Health (Cerner) Millennium – PowerChart.

**STEP 3:** Set the filters in the **General** tab for the desired card to modify.

**STEP 4:** Click **Find**.

**STEP 5:** Click the Preference Card from the list in the **Procedure** field.

**STEP 6:** Click the tab for the desired modification.

**STEP 7:** Make the needed modifications.

**STEP 8:** Click the **Save** icon.

### **Copy a Preference Card**

➤ From the **Perioperative Tracking Board**:

**STEP 1:** Click **Pref Card Maint** in the top menu.

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**STEP 2:** Log into Oracle Health (Cerner) Millennium – PowerChart.

**STEP 3:** Set filters to pull up preference cards that are like what is needed.

**STEP 4:** Click **Find**.

**STEP 5:** Right-click the desired preference card to copy.

**STEP 6:** Click **Copy To**.

**STEP 7:** Review any previous settings that may have used in the Copy Wizard window.

**NOTE:** **If this is the first time using Copy Wizard, all items are selected by default. Click the checkbox to select and deselect items.**

**STEP 8:** Select and deselect items to copy or not.

**STEP 9:** Click **Next**.

**STEP 10:** Set filters for the desired card to copy the card to.

**STEP 11:** Click **Find** to ensure there are not any other cards already created based on what will be copied.

**STEP 12:** Click **Create** once confirmed there are no other cards that match the one being created.

**STEP 13:** Click the **new card** from the Procedure field.

**STEP 14:** Click **Next**.

**STEP 15:** Review and make changes as needed to the copy preferences.

**STEP 16:** Click **Next**.

**STEP 17:** Verify these are the desired items to copy and from which card to the new card that has been created.

**NOTE:** **It is important to be careful to only copy to the intended preference card. It is easy to accidentally overwrite a card or multiple cards.**

**STEP 18:** Click **Finish**.

**STEP 19:** Ensure that that Preference Card(s) to be copied field now displays a green icon next to the new preference card to indicate successful copy.

**STEP 20:** Click **Close** to close the Copy Wizard.

**STEP 21:** Set the filters for the new preference card in the General tab.

**STEP 22:** Click **Find**.

**STEP 23:** Select the **new card**.

**STEP 24:** Review that the information has copied over as expected.

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## Set Segment Defaults

### ➤ From the Perioperative Tracking Board:

- STEP 1:** Click **Pref Card Maint** in the top menu.
- STEP 2:** Log into Oracle Health (Cerner) Millennium – PowerChart.
- STEP 3:** Set filters in the General tab to select the desired preference card to modify.
- STEP 4:** Click **Find**.
- STEP 5:** Click to select the correct preference card.
- STEP 6:** Select the tab to set defaults for.
- STEP 7:** Document what will be set as default.
- STEP 8:** Click **Next**.
- STEP 9:** Document additional default information as appropriate.
- STEP 10:** Click **Add** when default documentation is complete.
- STEP 11:** Verify that the default has been added to the multi-select box.
- STEP 12:** Click **OK**.
- STEP 13:** Verify there is a blue asterisk indicating there is default documentation available for what was just set.
- STEP 14:** Click the **Save** icon.

## Perform a Global Pick List Update

### ➤ From the Perioperative Tracking Board:

- STEP 1:** Click **Pref Card Maint** in the top menu.
  - STEP 2:** Log into Oracle Health (Cerner) Millennium- PowerChart.
  - STEP 3:** Click the **Advanced** tab in the left-side pane.
  - STEP 4:** Click the **Of Types** dropdown arrow.
  - STEP 5:** Click **Pick List Items**.
  - STEP 6:** Type the currently used pick list item number in the Available Item field.
  - STEP 7:** Press **Enter**.
  - STEP 8:** Verify the right item is listed in the Available Field.
  - STEP 9:** Click **Add**.
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**STEP 10:** Click **Find** once the item is in the Find field.

**NOTE:** All preference cards with that item should now be listed in the Procedure field.

**STEP 11:** Click **Task** in the top menu.

**STEP 12:** Click **Global Pick List Update** to activate.

**STEP 13:** Click the **Replace Items** tab.

**NOTE:** There are additional tabs in the right-side pane depending on the action that needs to be completed.

**STEP 14:** Enter the original item number.

**STEP 15:** Press **Enter**.

**STEP 16:** Enter the new item number in the With field.

**STEP 17:** Press **Enter**.

**STEP 18:** Click **Add** to List.

**STEP 19:** Review the items being updated; it is selected by default.

**STEP 20:** Select all the cards in the Procedure list.

**NOTE:** Multi-select by clicking the first item in the list. Then scroll down to the last item in the list. Hold down the Shift key and click the last item. All items in the list should now be selected.

**STEP 21:** Click **Run Update**.

**STEP 22:** Confirm the update, click **Yes**.

**STEP 23:** Print the report if needed.

**STEP 24:** Click **Task** in the top menu.

**STEP 25:** Click **Global Pick List Update** to deactivate.

**NOTE:** This must be deactivated once all updates are complete.

**STEP 26:** Click one of the cards with the updated information.

**STEP 27:** Click the **Pick List** tab.

**STEP 28:** Review the Pick List to verify the change was made.