

This Quick Reference Guide (QRG) demonstrates the workflow for Preoperative documentation.

Common Buttons & Icons

	Add Segment folder icon
	X Close button
	Move Right arrow icon
	Move Left arrow icon
	Case Attendee icon
	PreOp Case Times icon
	Case Details icon
	Sign icon
	Finalize Flag icon
	Next button

Document the Preoperative Summary

➤ From the Perioperative Summary Screen:

STEP 1: Click **Menu** if it is not already expanded.

STEP 2: Click **Perioperative Doc.**

STEP 3: Select the document needed from the Document Selection window.

STEP 4: Click **OK.**

STEP 5: Click **Case Times** in the Documentation tab.

STEP 6: Document the required time and date information, noting other information as appropriate.

NOTE: If an item is highlighted gray, it is required documentation.

STEP 7: Click **Pre-Care Activity**, then click the **Comments** field to free text information as appropriate.

Add/Remove a Segment in the Perioperative Doc:

➤ From the Case Selection screen:

STEP 1: Run a search using the **Select By** and **Criteria** parameters as appropriate.

STEP 2: Click to select the desired case to modify.

STEP 3: Click **Menu** if the left side menu is collapsed within the patient's chart.

STEP 4: Click **Perioperative Doc**.

STEP 5: Select the desired document to open.

STEP 6: Click **OK**.

STEP 7: Click the **Add Segment** folder icon.

STEP 8: Click the needed segment from the Available pane.

STEP 9: Click the **Move Right** arrow icon to move the segment to the Selected pane.

NOTE: **To remove a segment:**

- **Click the item to be removed from the Selected pane.**
- **Click the Move Left arrow icon to move it to the Available pane.**

STEP 10: Click **OK**.

Discontinue a Segment

➤ **From the Perioperative Doc:**

STEP 1: Right-click the segment to discontinue within the Documentation tab.

STEP 2: Click **Discontinue** followed by the name of the segment to be discontinued.

STEP 3: Document the discontinue reason if applicable.

STEP 4: Verify that the segment is now grayed out indicating it is discontinued.