From the Office of Health Informatics
# Quick Reference Guide (QRG) Document Preoperative Information – Part 1
August 8, 2025

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

## Common Buttons & Icons

| | |
|---|---|
| | **Add Segment** folder icon |
| X | **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>> | **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 Case Attendees

- From the Perioperative Doc:

STEP 1: Click the **Case Attendee** icon.

STEP 2: Click the **Case Attendee Magnifying Glass** icon to search for attendees, if needed.

STEP 3: Click the **Role Performed** dropdown arrow to set the role the attendee performed.

STEP 4: Click **OK.**

## Modify Preop Case Times

➢ **From the Perioperative Doc:**

STEP 1: Click the **PreOp Case Times** icon.

STEP 2: Click the appropriate Time and Date fields to document case times.

NOTE: **Items with a gray checkbox are required.**

STEP 3: Click **OK.**

## Document the Preprocedure Checklist

➢ **From the Perioperative Doc within the patient chart:**

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

STEP 2: Click **Nurse View.**

STEP 3: Click the **Admission Documentation** component down arrow.

STEP 4: Click the **Preprocedure Checklist Form**.

NOTE: **Some information flows over from the Preadmission PowerForm. Sections with a red asterisk indicates there is required items for documentation within that section. Yellow highlighted items are required documentation.**

STEP 5: Click **Checklist**.

STEP 6: Document the appropriate information for the checklist.

NOTE: **If documenting bedside, do not complete the Urine Pregnancy POC Result field if sending it out by lab.**

STEP 7: Click **Perioperative Protocols.**

STEP 8: Document required information.

STEP 9: Complete the rest of the required documentation.

STEP 10: Click the **Sign** icon once all required documentation is complete.

## Document Outside Labs

➢ **From the Nurse View within the patient chart:**

STEP 1: Click the **Admission Documentation** component down arrow.

STEP 2: Click **Outside Labs.**

**STEP 3**: Change the Performed On to Collection Date for the lab that is being documenting if that has not already been completed.

**STEP 4**: Click **Yes** once this the change has been made.

**STEP 5**: Click the lab that completed the one that is being documenting.

**NOTE**: **If the needed lab is not listed, use the Other option.**

**STEP 6**: Click the lab for documentation from the list on the left side.

**STEP 7**: Document lab information as appropriate.

**STEP 8**: Click the **Sign** icon once documentation for the outside lab is complete.

**STEP 9**: Click the **Refresh** icon back at the Nurse View screen to update.

## Document Periop Systems Assessments

- **From the Nurse View screen within the patient chart:**

**STEP 1**: Click the **Admission Documentation** down arrow.

**STEP 2**: Click **Periop Systems Assessments**.

**STEP 3**: Utilize the bands in Interactive View and I&O to document as appropriate.

**NOTE**: **Focus on the Periop Lines Devices procedures, Periop Systems Assessment, and the Periop Quick View.**