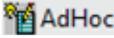
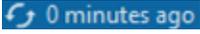


This Quick Reference Guide (QRG) demonstrates the workflow for Preadmission Testing documentation.

Common Buttons & Icons

	Blue Arrow icon
	AdHoc button
	Component down arrow
	Sign icon
	Refresh
	Implant Add icon
	Home icon

Search for Patients

➤ From the specific location's Perioperative Tracking board:

STEP 1: Click the **Filter** dropdown arrow.

STEP 2: Choose the desired days to search for patients.

Set an Event

➤ From the Perioperative Tracking board:

STEP 1: Right-click the **Status** field for the patient to set the event for.

STEP 2: Click **Set Events**.

STEP 3: Click the appropriate tab to set the type of event needed in the Case Tracking Set Events window.

STEP 4: Click the event.

STEP 5: Click **OK** once reviewed that the correct event information is listed.

Use a Free Text Comment

➤ From the Perioperative Tracking board:

STEP 1: Double-click the **PAT Comment** field for the listed patient.

STEP 2: Type the comment.

Set Filter Defaults

➤ **From the Perioperative Tracking board:**

STEP 1: Double-click the blue Arrow icon to navigate to the patient's chart.

NOTE: **The Perioperative Summary should default open. The Perioperative Summary can also be selected from the left side menu.**

STEP 2: Click the component blue down arrow.

STEP 3: Click the desired Filter to use.

STEP 4: Click **Set As Default** at the bottom of the component.

Document Preadmission

➤ **From the patient chart:**

STEP 1: Click **AdHoc** in the toolbar.

STEP 2: Select the **Preadmission Assessment** checkbox.

STEP 3: Click **Chart**.

STEP 4: Click the sections along the left to document applicable information within that section.

NOTE: **Any sections with a red asterisk have required documentation.**

STEP 5: Click the **Sign** icon once documentation is complete.

STEP 6: Click **Close** to close the AdHoc Charting window.

STEP 7: Click the **Refresh** icon back at the Nurse View.

Document an Implant

➤ **From the Nurse View Histories component:**

STEP 1: Click the **Procedure** tab.

STEP 2: Click the **Histories** component header.

STEP 3: Click the **Implants** tab.

STEP 4: Click the Implant **Add** icon.

STEP 5: Click the **Implant Description** field.

NOTE: **The option of using the free text checkbox is also available. It is selected by default. Click the checkbox to deselect it, if needed.**

STEP 6: Click the **Quantity** field. Enter the quantity by typing in the number or using the up and down arrows.

STEP 7: Document the Implant date using the up and down arrows, the Calendar down arrow or typing in the date.

NOTE: **There is the option of documenting by day, month, and year based on the information available.**

STEP 8: Document additional information as it is available.

NOTE: **Items with an asterisk are required.**

STEP 9: Click **OK** at the bottom of the page once complete.

STEP 10: Click the **Home** icon.

Document a PAT Complete

➤ **From the Perioperative Tracking Board:**

STEP 1: Right-click the **Status** field for the patient being updated.

STEP 2: Click **Set Events**.

STEP 3: Click **PAT Complete** on the PAT tab.

STEP 4: Review that information listed is accurate.

STEP 5: Click **OK**.

STEP 6: Click the **PAT Comment** field.

STEP 7: Delete the comment using the **Delete** key on the keyboard.