





**This Quick Reference Guide (QRG) reviews 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**

You can create a preference card from within PowerChart or from the AppBar. These instructions are from PowerChart. From the Perioperative Tracking Board:

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

**STEP 2:** Log in to Cerner Millennium.

**STEP 3:** Click the **Area** drop-down arrow.

**STEP 4:** Select the area you are building the card 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 your 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:** You can also press [Enter] on the keyboard to search for an item.

**STEP 7:** Select available check box 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:** If you forget to save and move to another segment you will get a Save window pop-up where you can also save.

➤ **Add Segments for Documentation**

From the Segments tab of the preference card:

**STEP 1:** Click and drag the segment you want 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:** You can use the Append function icon to conduct another search with different filter selections and add the results of the search to your current search results if needed.

**STEP 3:** Click the select the card you want to copy comments from.

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

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

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

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

**STEP 8:** Click the preference card you want 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 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 you need.

**Modify a Preference Card**

From the Perioperative Tracking Board:

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

STEP 2: Log into Cerner Millennium.

STEP 3: Set the filters in the General tab for the card you need 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 modification you are looking to make.

STEP 7: Make the needed modifications.

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

**Copy a Preference Card**

From the Perioperative Tracking Board:

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

STEP 2: Log into Cerner Millennium.

STEP 3: Set filters to pull up preference cards that are similar to what you need.

STEP 4: Click **Find**.

STEP 5: Right-click the preference card you want to copy.

STEP 6: Click **Copy To**.

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

NOTE: If this is the first time you are using Copy Wizard all items are selected by default. Click the check box to select and deselect items.

STEP 8: Select and deselect items you want or don't want to copy.

STEP 9: Click **Next**.

STEP 10: Set filters for the card you want to copy the card to.

STEP 11: Click Find to ensure there are not any other cards already created based on what you are going to copy.

STEP 12: Click **Create** once you have confirmed there are no other cards created like the one you want.

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 items you want to copy and from which card to the new card you have created.

NOTE: It is important to note that you must 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.

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STEP 22: Click **Find**.

STEP 23: Select the new card.

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

### **Set Segment Defaults**

From the Perioperative Tracking Board:

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

STEP 2: Log into Cerner Millennium.

STEP 3: Set filters in the General tab to select the preference card you want to modify.

STEP 4: Click **Find**.

STEP 5: Click to select the correct preference card.

STEP 6: Select the tab you want to set defaults for.

STEP 7: Document what you want 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 you 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 Cerner Millennium.

STEP 3: Click the **Advanced** tab in the left-side pane.

STEP 4: Click the **Of Types** drop-down arrow.

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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**.

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 you need to complete.

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 you are updating; 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.

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