From the Office of Clinical Informatics

Quick Reference Guide (QRG) SurgiNet - Document Intraoperative Information

October 6, 2021

This Quick Reference Guide (QRG) Outlines the steps to complete intraoperative documentation.

Common Buttons & Icons

	Case Times icon
	Add Segment icon
>	**Move Right Arrow** icon
	Save icon
	Properties icon
	Regenerate Pick List icon
	Delete icon
	Finalize Flag icon

Document the IntraOp Record

➢ From the Perioperative Summary page:

STEP 1: Click the **Intraoperative Summary** tab.

STEP 2: Review patient information; then click **Perioperative Doc** in the Menu.

STEP 3: Click the **Record** drop-down arrow; then click **OR IntraOp Record**. The OR Intraop Record displays on the Documentation tab.

NOTE: Red exclamation marks in the Navigation pane indicate required segments for the surgery.

STEP 4: Click **Safety Checklist 1) Sign In** in the Navigation pane.

STEP 5: Document pertinent patient information.

NOTE:

- **Check boxes that display in gray denote required information.**
- **To move to the next page in a segment, use the Next button.**
- **When you complete a segment, a green check mark displays.**

STEP 6: Click **Safety Checklist 1) Time Out** in the Navigation pane.

STEP 7: Click the procedure. The segment information automatically updates.

STEP 8: Review the information; then click **Next**.

STEP 9: Continue documenting pertinent patient information.

NOTE: Document the Surgical Timeout Completed per your location's policy.

Document the Case Time

NOTE: You can document a case time without leaving your current segment documentation.

➢ From the Perioperative Doc screen:

STEP 1: Click the **Case Times** icon. The Case Times window displays.

STEP 2: Click the **Time** field. The Date and Time default to the current date and time.

NOTE: You can adjust the date and time if needed.

STEP 3: Click **OK**.

Add a Segment

➢ From the Perioperative Doc screen:

STEP 1: Click the **Add Segment** icon. The Add Segment window displays.

STEP 2: Click the segment you want to add in the left pane.

STEP 3: Click the **Move Right Arrow** icon.

STEP 4: Click **OK**.

Discontinue a Segment

➢ From the Perioperative Doc screen:

STEP 1: Right-click the segment you want to discontinue; then click **Discontinue**.

Document the Case Time

➢ From the Perioperative Doc screen:

STEP 1: Click the **Case Times** icon. The Case Times window displays.

STEP 2: Click the **Time** field. The Date and Time default to the current date and time.

NOTE: You can adjust the date and time if needed.

STEP 3: Click **OK**.

Document the Pick List

- From the Perioperative Doc screen:

STEP 1: Click the **Pick List** tab in the Navigation pane.

STEP 2: Review the **Open Qty** cells.

STEP 3: Update the **Fill**, **Used**, and **Wasted Qty** cells.

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

View Surgery Details

- From the Perioperative Doc screen:

STEP 1: Click the **Properties** icon. The Property window opens.

STEP 2: Click the **Specifics** tab.

STEP 3: Modify information as needed.

STEP 4: Click **OK**.

Discard a Pick List

- From the Perioperative Doc screen:

STEP 1: Click the **Regenerate Pick List** icon.

Add a Column

- From the Perioperative Doc screen:

  Right-click a procedure folder; then click **Options**. The Display Options window displays.

NOTE: **Never right-click the case tracking number. Doing so will update all items on the Pick List.**

STEP 1: Select the appropriate check box(es).

STEP 2: Click **OK**.

Add an Item

➢ From the Pick List tab of the Perioperative Doc:

STEP 1: Click the procedure in the Navigation pane.

STEP 2: Click the **Search** field.

STEP 3: Enter a search term; then click **Add**. The Find All Items window displays.

STEP 4: Select search options.

STEP 5: Click **Find Now**. Search results display.

STEP 6: Click the appropriate item.

STEP 7: Click **OK**.

NOTE: You can also add a free text item. To do so:

- **Click the procedure in the Navigation pane.**
- **Click the Search field.**
- **Enter the item; then click Add.**
- **Click Yes.**

Delete an Item

➢ From the Pick List tab:

STEP 1: Click the item you want to delete.

STEP 2: Click the **Delete** icon in the toolbar.

STEP 3: Click **Yes**.

Finalize the IntraOp Doc

➢ From the Perioperative Doc screen:

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

STEP 2: Complete Segments, if needed.

NOTE: An incomplete segment displays with a red exclamation mark in the Navigation pane.

STEP 3: Click the **Finalization Flag** icon.

STEP 4: Click **Yes**. The document displays with a red Finalize Flag icon.

STEP 5: Click **Documentation** in the Menu.

STEP 6: Click **Refresh**.

STEP 7: Click **OR IntraOp Record**. The Final Report displays.