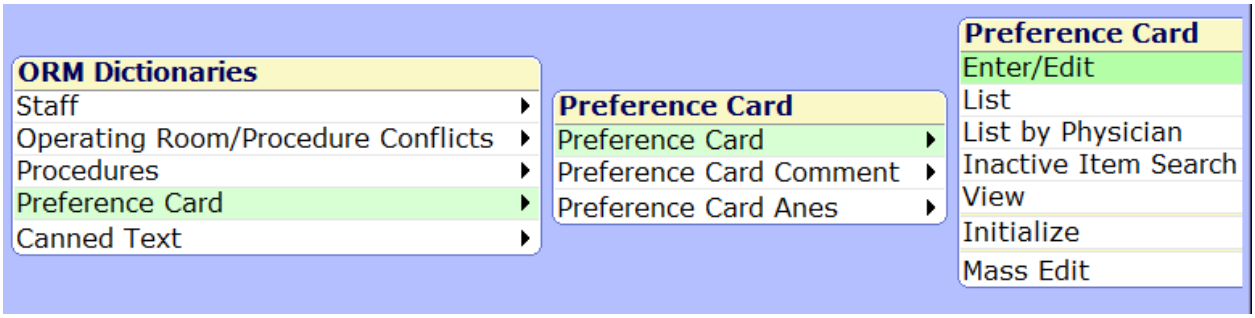
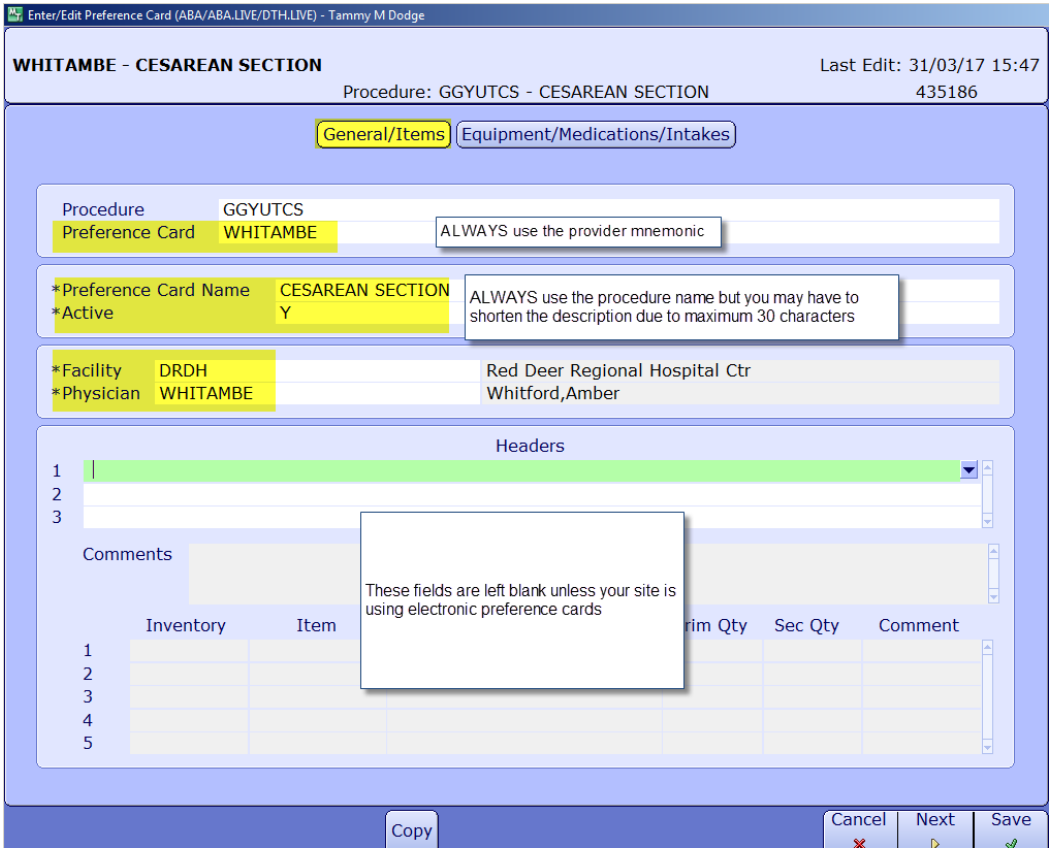
Preference Card for Documentation of Medications and Equipment only

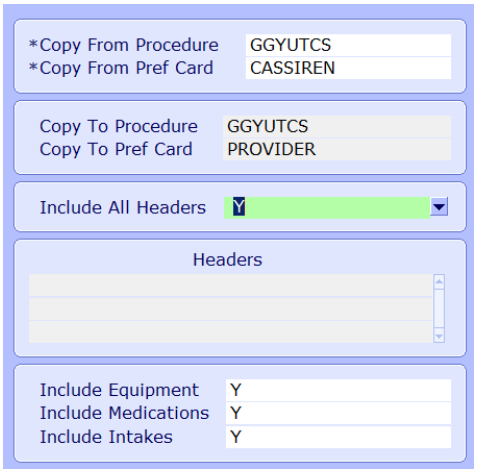


CREATING A NEW CARD

General/Items

- Only one physician can be assigned to a card and only one active card per physician
- All procedures should have a Default card (.) that can be used for locums or new physician's without cards.
- Use the copy feature to support your build but remember to update the provider field
- Always build your cards with the naming convention provided below as this has been suggested approach from Meditech ORM Optimization Team





I. **Procedure** – pick a procedure for your site. Each department/site has a one character letter that is used for every preference card.

II. **Preference Card** – ALWAYS use the provider mnemonic

III. Copy from pop up box appears and you can copy an existing card by the same or similar physician thus saving your from entering the items from scratch. Just make sure you pick a card linked to your site/department otherwise you will have equipment and items that belong to the wrong location

IV. **Preference Card Name** – ALWAYS use the procedure description. You can only use a maximum of 30 characters so do your best to use a consistent description for all cards linked to that procedure. *The reason the card is named after the procedure is to support an alternative check when sites print preference cards. The scheduled procedure may have been edited but if you see the preference card name, you can assess if that automated card, reflects what correct item pick.*

V. Active – Y

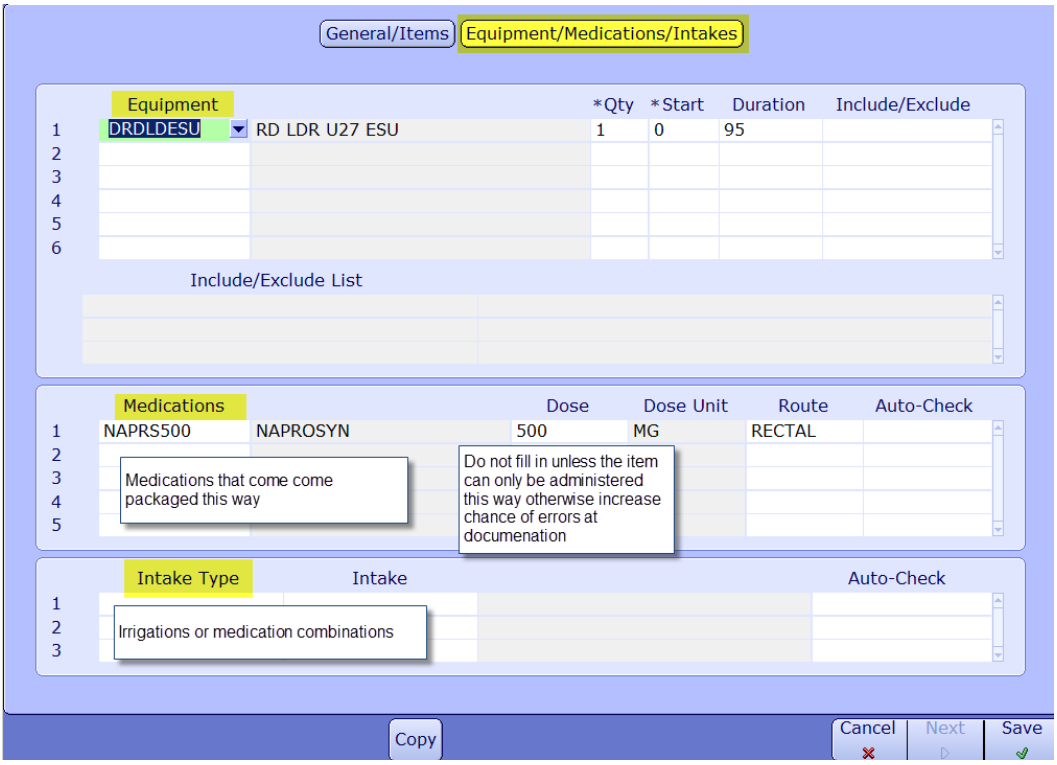
VI. **Facility** – 4 characters for your site.

VII. **Physician** – Provider mnemonic. If creating a default preference card, just enter a period (.) in this field and Meditech interprets this as a default card.

VIII. **Headers –** skip this field (only for sites that use full preference cards)

IX. **Inventory** – skip this field (only for sites that use full preference cards)

Equipment/Medications



I. **Equipment** – ALWAYS pick items prefixed for your site and department. E.g. DRDOR (Red Deer OR, DRDLD (Red Deer Labour Delivery). This is a group field thus you are not picking a selective item in this group but rather identifying a requirement to have this group of items connected to this procedure. The system will reserve one item for that case but at the time of documentation you need to validate the one you are using and update it accordingly
II. **Qty, Start, Dur** – Leave the values that default in. It is not necessary to pinpoint the estimated minutes of use unless this item is being set with extreme conflict checks
III. Include/Exclude – We DO NOT recommend you use this field. It makes ongoing maintenance and mass edit very difficult.
IV. **Medications –** Pick the medication based on the packaging you would use for the case. E.g. Lidocaine 20ml vial.
V. **Dose** – Only populate this field if the medication is ALWAYS administered this way. E.g. Pill form it would be reasonable to fill in the dose but a vial of local anesthetic you would leave this blank
VI. Route – Only populate this field if the route is always the same
VII. **Intake** – Irrigation or Medication combination items
VIII. **F12** to save your work
IX. The screen will pop up asking you **preview the new card** or edit and it is advisable to do this and double check your work

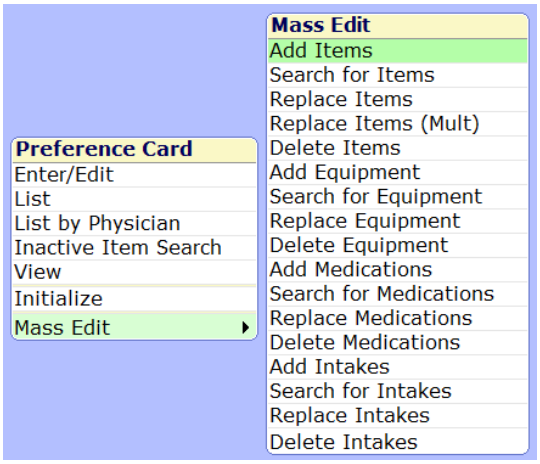
INACTIVATING A PREFERENCE CARD

I. Find the procedure and surgeon's card
II. Change Active field to N
III. F12

Note: The physician field is required therefore if you are inactivating because you need to redo a card for that provider, the moment you file it as inactive, you can create a new card with that same provider. You just can't have more than one active at a time for the same provider. A pop up may appear to let you know that provider is linked to another card, but you can ignore that and proceed.

MASS EDIT FEATURES

- Be very careful using this process as you cannot undo a mistake and you could edit cards for other specialties, departments and sites.
- Physician's work in more than one site hence if you just replace something and restrict it to the physician, all cards that he/she is linked to, will update
- ALWAYS narrow the mass edit to a procedure group or procedures. One or both of those fields need to be populated to ensure you don't edit the wrong locations cards.



- Default cards may not have a facility field populated but they are still linked to a procedure and procedure group. If you have issue with a mass edit you can leave the facility field blank as long as you populated the procedure group and/or procedure field.
- Mass edit to Search, Replace or Delete - Items (inventory and implants, Equipment (equipment groups), Medications, Intakes.