Navigating the Perioperative Documentation Tab

1. **Record List**: Displays the different record types available for you to document.

2. **Tabs**:
   - **Documentation**: Displays the list of segments for the selected record type for the current patient case.
   - **Pick List**: Displays a list of all inventory items required for the specific patient procedure. It can be used for inventory tracking and billing purposes.

3. **Segments**: Collections of forms used to document the appropriate patient and procedure information.

**Segment Icons**:
- **Segment Group** - Double-click to open the folder and display its list of segments.
- **Segment** - Select to open the appropriate documentation form.

- **Contains Automatic Defaults** - Some fields are documented automatically when the segment is opened. You can overwrite automatic defaults if needed.
- **Contains Manual Defaults** - Select whether to automatically document certain fields.
- **Discontinued** - Segment does not require documentation.
- **Required** - Segment contains required fields / all required fields have been completed.
- **Electronic Signature** - Segment requires electronic signature / has been signed.

3. **Form**: Used to complete the documentation in each segment.

4. **Comments**: Can be used to add free-text comments to any segments or pick list items.
Creating a Surgical Case

1. In the Surgical Case Manager window, click New Case.

The Person Search dialog box opens.

2. Search for the appropriate patient or click Add Person to add a new patient to the system.

3. Enter the appropriate scheduling information, then click Add to open the Surgical Procedure dialog box.

4. Enter the procedure for this case by selecting it from the list in the Procedure box.

5. Press TAB. Default values for the Anesthesia Type, Specialty, and Duration boxes are displayed. To change a value, click the box and enter the correct value.

6. Click OK to save your entries.

7. When you have finished adding procedures to the case, click Apply. A message box prompts you when the case is created successfully and assigns a Case Number and Case Code ID.

8. Click OK in the message box to close it and return to the Surgical Case Manager window.

Checking in the Patient

1. From the Case Select window, search for the patient using one of the five search options available.

2. Click Retrieve to populate the list based on your search parameters.

3. Select the patient from the list and click Check In.

4. Verify the information in the Associate Encounter dialog box and click Accept.

Toolbar Buttons

Once the patient is checked in, click Perioperative Doc from the Table of Contents to begin completing the documentation.

Button | Action
--- | ---
Case Attendees | Opens the Case Attendance segment template, which requires completion before the document can be finalized.
Case Times | Opens the Case Times segment template, which requires completion before the document can be finalized.
Case Details | Opens a concise, read-only view of the case details.
Electronic Signatures | Opens the Electronic Signature dialog box so you can view signed or unsigned items for fields, segments, or documents.
Verbal Orders | Opens the Verbal Orders window, in which you can approve verbal

Finalizing the Document

1. From the documentation toolbar, click Finalize.

2. The system checks for document deficits with one of the following results:
   - If all required documentation is complete, the system displays the message, The document has no deficits. Would you like to finalize the document? Click Yes.
   - If incomplete required documentation remains, the Documentation Deficits dialog box opens. Complete the required documentation listed.

Once finalized, the finalized documentation is displayed.