



# **DIGISTAT® Smart Scheduler**

DIGISTAT® Version 5.0

## **User Manual**

DIG UD SSC IU 0006 ENG V01  
31 January 2017

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**DIGISTAT® version 5.0**

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## 2 Digistat “Smart Scheduler”

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*For general and detailed information about the DIGISTAT® environment and the instruction for use of the Control Bar software see the document “DIG UD CBR IU 0006 ENG V01 - Digistat Control Bar User Manual”. The knowledge of this document is necessary for a correct and safe use of the Digistat Smart Scheduler software.*

### 2.1 Introduction

---

The DIGISTAT® “Smart Scheduler” system is a tool for documenting the scheduling of interventions in the operating room at surgical block or individual room level.

Using “Smart Scheduler”, it is possible to record every significant detail concerning the patient and the surgical, manage room staff, plan time schedules, spaces and operating resources.

The information gathered is for documentation use. The “Smart Scheduler” system is not intended for the replacement or alteration of the management and control practices usually implemented in the structure where it is used.

We also recommend that you keep accurate paper records of every activity performed, making reference to it when necessary.

### 2.2 Operation state

---

The “Operation State” concept characterizes work inside the whole “Smart Scheduler” system, so it is necessary to explain it before looking at the different pages and procedures.

The term “Operation state” means the “stage” of the “path” that every surgical operation has to go through from the initial meeting with the patient until completion of the operation.

The Smart Scheduler system envisages three different operation states.

- Foreseen – The operation is “foreseen” when the decision has been made to operate on a specific patient. Therefore the procedure for the operation in question is opened.
- Requested – The operation is usually “requested” when all the bureaucratic or medical requirements in relation to the operation in question have been met. In practical terms, to facilitate the inclusion of emergency operations, an operation can be “requested” by simply indicating the type of operation and its planned duration (see paragraph 7.2).

- Scheduled – The operation is “scheduled” when it has been included in the general schedule of operations. A surgical block, room, date and time are usually assigned in “scheduled” state. It is possible, in order to quickly schedule emergency operations, to “plan” an operation lacking the above characteristics (either all or some of them). These operations are known as “reserves” and are described in paragraph 8.5.5.



*The Smart Scheduler-OranJ combined system envisages six different “operation states”. The three states described above are followed by the “Ready” state (the patient has undergone the surgical block check-in), by the “In progress” state (the operation is in progress) and by the “Completed” state (the patient is out of the operating room). The last three states, while shown on Smart Scheduler, are managed by the DIGISTAT® OranJ (Operating Room and Anesthesia Journal) system.*

*It is also possible, according to the needs and the procedures in use, to activate on “OranJ” an ulterior state making the “Completed” operations impossible to edit. The data of these operations are “Read-only” data. These operations are characterized by a dark grey colour when displayed both in “OranJ” and in “Smart Scheduler”.*

## 2.3 Lock/Unlock operation

---

This chapter explains the principles and the goals of the operation lock/unlock functionalities.



*The lock/unlock operation procedure is available on different screens. The specific lock/unlock procedures will be explained in this manual contextually with the specific screen.*

The operation planning can be locked to increase the reliability and the accuracy of the plan.

When an operation is locked none of the values regarding the operation planning can be edited unless the user has adequate explicit permissions.

When an operation is locked the following data cannot be edited:

- patient name;
- main operation and secondary operations;
- infections and transmissible diseases;
- surgical times;
- date and time;
- room.

There are three possible lock/unlock levels. Each hospital decides - by configuration - how many lock/unlock levels (none, one, two, three) to use.

The different levels can be used to create different user types, characterized by specific lock/unlock permissions.



An operation locked by a certain kind of user can be this way unlocked only by users having the explicit permission to do that. The hospital procedures are this way fixed in a way that increases their reliability.

Three specific icons appearing in the appropriate contexts identify the lock levels:



- First level lock.



- Second level lock.



- Third level lock.

Only certain “lock actions” are enabled for the logged user, depending on the context and his/her permission level.

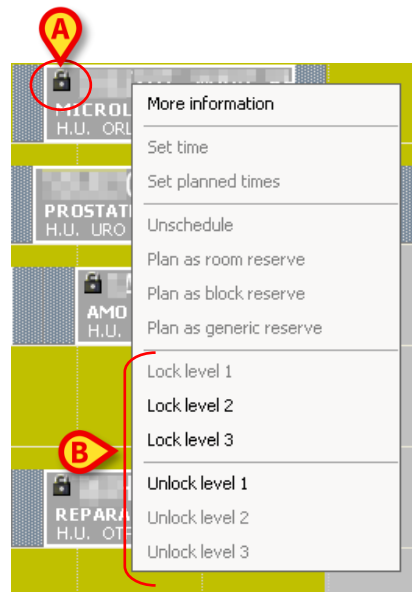
Fig 1, for instance, shows a situation in which, after a level 1 lock (Fig 1 A), the following options are enabled:

lock level 2;

lock level 3;

unlock level 1 (Fig 1 B).

The other options are disabled.



**Fig 1 - Lock/Unlock operation options**



*Only the operations scheduled for either the current day or the future days can be locked/unlocked. The operations scheduled for a past day and not done yet cannot be locked/unlocked.*

# 3 System structure

---


The DIGISTAT® “Smart Scheduler” system is formed of different modules:

These are:

- **Operation list** - makes it possible to search an operation/patient among those recorded by the system. This module is described in paragraph 4.
- **Schedule** - makes it possible to actually schedule the operations and to display the rooms schedule and availability. This module is described in paragraph 8.
- **Calendar** - provides a global view of the rooms availability in time. This module is described in paragraph 8.6.
- **Staff Management** – makes it possible to manage the operating staff. This module is described in paragraph 9.
- **Resources** – makes it possible to schedule resources for interventions. This module is described in paragraph 9.

# 4 Operation list

To access the “Operation List” module

- Click the corresponding icon -  - on the lateral bar.

The following screen will open (Fig 2)

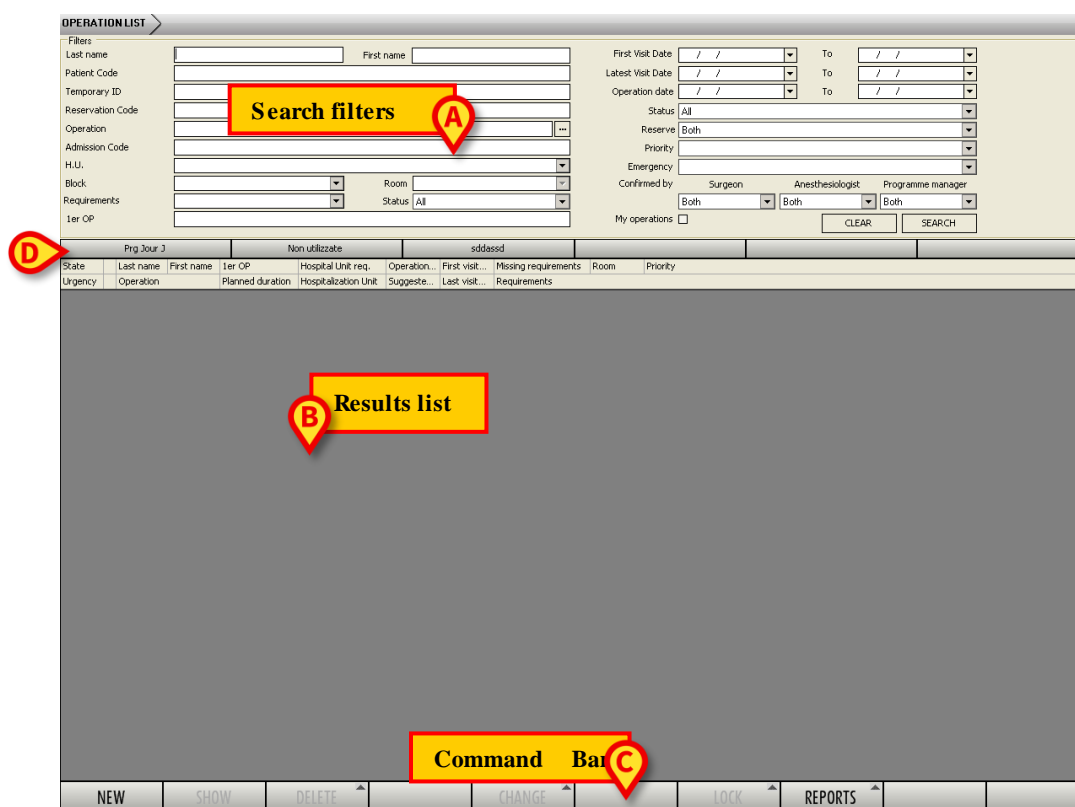


Fig 2 - Operation list

The screen is formed by four main areas:

- 1) The search filters - The area indicated in Fig 2 **A** contains the search fields that can be used to filter the list of operations. This area is described in paragraph 4.1.1.
- 2) The results area - The area indicated in Fig 2 **B** displays the search results after the search is performed. This area is described in paragraph 4.2. Each result refers to one of the operations recorded in the system.
- 3) The command bar - The command bar (Fig 2 **C**) contains a series of buttons making it possible to perform specific procedures. See paragraph 4.3 for a description of these procedures.
- 4) Pre-defined searches - The buttons indicated in Fig 2 **D** can be used to launch pre-defined searches that were previously recorded by the user. This functionality is described in paragraph 4.1.3.

Each result on this screen refers to an operation record containing all the detailed operation data (patient, date, requirements etc...).

## 4.1 How to search for an operation

**OPERATION LIST**

Filters

Last name:  First name:  mario

Patient Code:

Temporary ID:

Reservation Code:

Operation:

Admission Code:

H.U.:

Block:  Room:

Requirements:  Status:  All

1er OP:

First Visit Date:  To:

Latest Visit Date:  To:

Operation date:  To:

Status:  Scheduled

Reserve:  Both

Priority:

Emergency:

Confirmed by:  Surgeon  Anesthesiologist  Program

My operations: ☐

State	Last name	First name	1er OP	Hospital Unit req.	Operation...	First visit...	Missing requirements	Room	Priority
Scheduled	MARIO	Mario	60	AMB				BH05 - 17	
Scheduled	MARIO	MARIO	60	CPR				BH05 - 8	
Scheduled	MARIO	MARIO	60	CPR				BH05 - 3	
Scheduled	MARIO	MARIO	120	TRA				HO - HO 1	
Scheduled	MARIO	MARIO	30	OTP				HO - HO 1	
Scheduled	MARIO	MARIO	120	OTP				HO - HO 1	
Scheduled	MARIO	MARIO	150	CHT				BH05 - 10	9
Scheduled	MARIO	MARIO	60	CHP				HEL - E1	6

NEW SHOW DELETE CHANGE LOCK REPORTS

Fig 3 – Operation search

To search for an operation

- Insert the available operation data in the search field (In Fig 3 A we are searching for an operation in “Scheduled” state with “Mario” as patient’s name).
- Click the **Search** button indicated in Fig 3 B.

The list of operations corresponding to the specified values will appear (Fig 3 C).

If the results are more than a given number specified by configuration (more than 200 in the configuration we are describing) a specific pop-up message asks for a further specification of the search parameters.

### 4.1.1 Search parameters

The following parameters can be entered in the search fields.

- Patient name
- Patient surname


- Patient code
- Temporary ID.

This value is a temporary code which can be assigned to the patient who is not present in the hospital database, when it is necessary to create an operation-entry immediately (see paragraph 4.3.1.1 for the detailed procedure).

- Reservation code.
- Operation.

Specifies the type of operation to be scheduled.

A configuration parameter defines the way this field is specified. It can be either through a textual field in which the name of the operation is typed, or through a pop-up search tool.

In this case the  button appears near the field. Click it to open a window making it possible to search and select the operation from a pre-defined list (Fig 4).

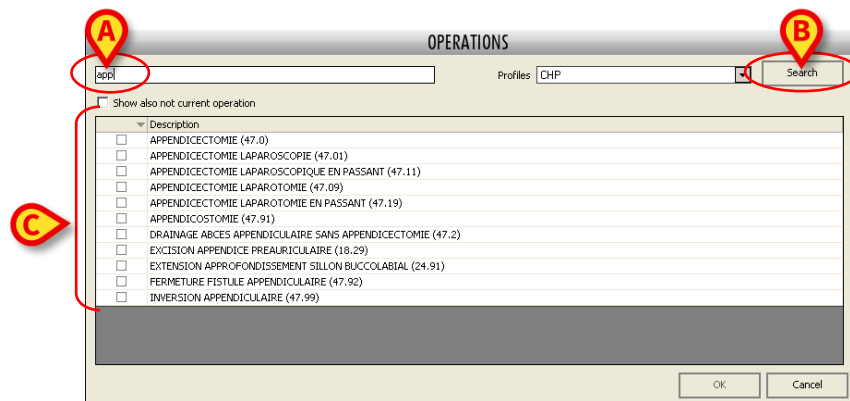


Fig 4 - Operation selection

To use this window


- insert the operation name (or part of it), in the field indicated in Fig 4 A.
- Click the **Search** button indicated in Fig 4 B.
- The list of operations whose names contain the inserted characters will appear (Fig 4 C).
- Select the wanted operation/s.

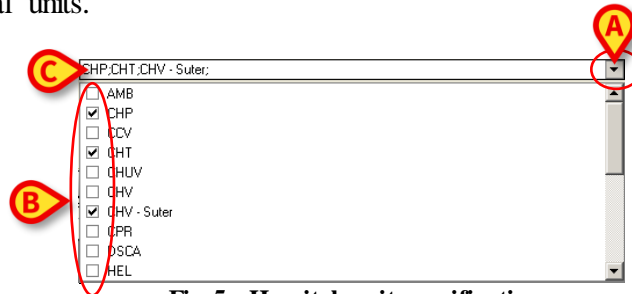
The name of the operation/s will appear in the “Operation” field. Multiple selection is possible. The result of a search performed with multiple entries in the “Operation” field returns the list of operation records corresponding to any one of the operations specified.

- Admission code.

- H.U.

Specifies the hospital unit of the wanted operation.

The  button placed near the field (Fig 5 A) opens a drop down menu listing all the possible hospital units.



**Fig 5 - Hospital unit specification**

- Click the box/es placed near the name of the relevant hospital unit/s (Fig 5 B).

The box will be selected.

The names of the selected units will appear in the field (Fig 5 C).

- Block

Specifies the block of the wanted operation. Multiple specification is here as well available.

- Room

Specifies the room scheduled for the operation. Multiple specification is here as well available.

- Requirements.

This field enables to display the list of the operations for which information on the operation requirements are available (a requirement may be a document, a medical examination, a certain type of test, etc. - see paragraph 7.3 for a detailed explanation of the possible requirements).

The “Status” field placed nearby enables to specify whether the requirements for the operation are either missing, or obtained, or not obtained, or there is no information available on the operation requirements.

- First Operator

Specifies the name of the first operator associated to the wanted operation

- First visit date

It is here possible to specify two dates indicating the time span within which the search is performed.

- Latest visit date

It is here possible to specify two dates indicating the time span within which the search is performed.

- Operation date

It is here possible to specify two dates indicating the time span within which the search is performed.

- Status

Specifies the state of the operation you are searching for.

- Reserve

This field specifies whether the operation for the patient you are searching for is a reserve and, if so, the type of reserve (see paragraph 8.5.5 for details on the concept of reserve). “Both” means that you are searching among both “reserves” and “non-reserves”.

- Priority.

Specifies the type of priority assigned to the wanted operation. The “Priority” and “Emergency” fields are mutually exclusive, i.e. if one is selected the other one is disabled.

- Emergency


Specifies the emergency level assigned to the wanted operation. The “Priority” and “Emergency” fields are mutually exclusive, i.e. if one is selected the other one is disabled.

- Confirmed by Surgeon/Anesthesiologist/Program manager.

Specifies whether or not the wanted operation has been confirmed by those specified. Choose “Both” to search among all confirmed and unconfirmed operations.

- My operations

Choose this box to limit the search to the operations scheduled by the user connected at that time and inserted in a personal list (See paragraph 7.2.19 for a description of this option).

In fields flanked by the arrow  click the arrow to enter the value. This opens a window containing different options to choose from. See, for example, Fig 6 related to the “Status” field.

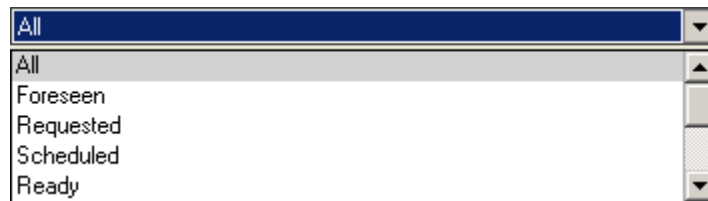



Fig 6 – State selection window

To choose the preferred option, simply click it. The clicked item will appear in the “Status” field.

## 4.1.2 Date specification

A dedicated tool is available every time the date must be specified.

To open that tool

- Click the  button placed near the “date” field.

A calendar-window will open (Fig 7)

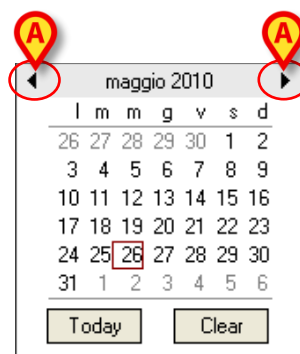


Fig 7

The month is specified on top. The numbers correspond to the days.

To insert a date

- click the number corresponding to the wanted day.

The date will be automatically inserted in the field.

Current day is circled (red - 26th of May in Fig 7).

Use the arrows indicated in Fig 7 A to select another month. Left arrow displays the previous month, right arrow displays the following month.

Use the **Today** button to select to the current day again.

Use the **Clear** button to close the window without selecting a date.



### 4.1.3 Pre-defined searches

The bar that divides the upper and lower parts of the page Fig 8 is made up of buttons that can be configured to perform pre-defined searches.



Fig 8 – Pre-defined search buttons

To create a pre-defined search

- Enter the search parameters required.
- Move with the mouse to the button you wish to use for the search (Fig 8 A).
- Right click.

The following window will open.

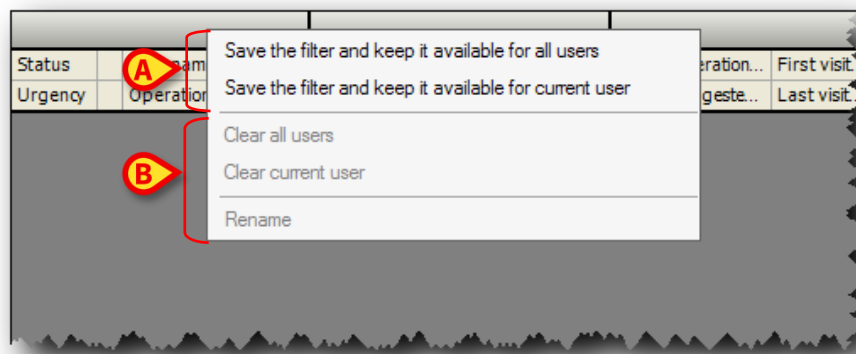


Fig 9 – Setting a pre-defined search

- Click the first or second option (Fig 9 A).

The “Save the filter and keep it available for all users” option saves the pre-defined search so that it can be seen by all Smart Scheduler users.

The “Save the filter and keep it available for current user” option saves the pre-defined search so that it can be seen only by the user who created it.

The following window will appear (Fig 10).

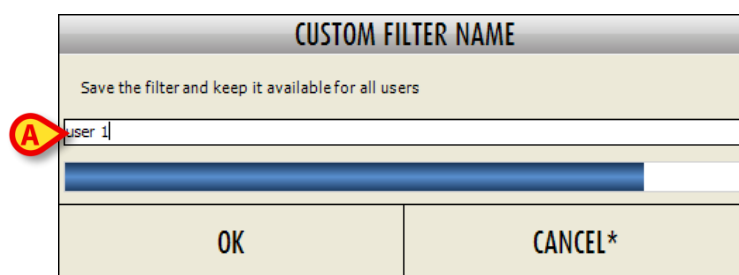


Fig 10 – Name search

- Enter the name you wish to assign to the pre-defined search (Fig 10 A).
- Click the **Ok** button.

The name assigned to the search will appear on the chosen button (Fig 11).



Fig 11 – Search button

From now on, when that button (**User 1** in the example) is clicked, the search parameters saved will be automatically set.

To eliminate the type of search created, simply click either the “clear all users” options (if the button is visible to all users) or the “clear current user” option (if the button is only visible to the current user - Fig 9 B).

To change the name of a stored search, simply click “Rename” (Fig 9 B).

## 4.2 Search results

The results of the search are shown in the lower part of the page Fig 12).

State	Last name	First name	1er OP	Hospital Unit r...	Operation...	First visit...	Missing requirements	Room	Priority
Urgency	Operation		Planned duration	Hospitalization...	Suggeste...	Last visit...	Requirements		
Scheduled	ABLATION MATERIEL IMPLANTE CARPE (GAUCHE) (78.64)		60	AMB				BH05 - 17	
Complete	AMO PERONE (GAUCHE) (78.67)		60	TRA			Convocation BH 05; Con...	BH05 - 7	
Complete	73120.0 REDUCT.OUVERTE ET OSTEOS.DU PER.DIST.		120	OTR				BH05 - 7	Inconnue
Complete	LAPAROSCOPIE EXPLORATRICE		75	CHV				BH05 - 14	
Complete	RESECTION WEDGE METASTASE -PERIKYSTECTOMIE - ENUCLEATION FOIE (5...		60	CHV - Suter			Consentement; CPC; EC	BH05 - 11	
Complete	Révision de tympanoplastie, second look (Oreille moyenne)		180	ORL				BH05 - 18	Inconnue
In progr...	MYOTOMIE MS (DROITE) (83.19)		90	CHUV				BH05 - 10	
Complete	REPARATION ARTHROSCOPIQUE ISOLEE LESION LCP (DROITE) (81.45)		90	OTP			HO Attelle genou	HO - HO 1	
Complete	CURE ANEURISME AORTE ABDOMINALE (39.51)		180	CHT			CPC; Transfert SMIA	BH05 - 10	
Complete	AUTRES PONTAGES CORONAIRES MULTIPLES EN CEC		200	CCV			Transfert SMIA	BH05 - 5	6
Complete	GANGLION SENTINELLE		30	CHV				BH05 - 1	Inconnue
Complete	27210.0 EXCISION DE GANGLION LYMPHATIQUE AXILLAIRE		120	CHV				BH05 - 6	Normale
Complete	Correction de cicatrice retractile ou de bride cicatricielle		60	CPR			Convocation CCA	BH05 - 23	
Scheduled	RECONSTRUCTION GREFFE PEAU (86.6)		60	CPR			CPC	BH05 - 8	
Complete	URETERO-PYELOGRAPHIE RETROGRADE UPR (GAUCHE) (87.74)		30	URO				BH07 - U...	
Complete	REDUCTION FERMEE ET OSTEOSYNTHESE DIAPHYSE FEM (GAUCHE) (79.15)		90	TRA				BH05 - 7	

Fig 12 – Search results

In this example, the search has been carried out specifying the patient name (“Mario”). The result is the list of all the operations for patients whose name is “Mario” (or contains these sequence of letters).

Every result is arranged on two lines. The two heading lines provide the key to reading the results, indicating the information available in the list (Fig 12 A, Fig 13).

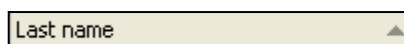
State	Last name	First name	1er OP	Hospital Unit r...	Operation...	First visit...	Missing requirements	Room	Priority
Urgency	Operation		Planned duration	Hospitalization...	Suggeste...	Last visit...	Requirements		

**Fig 13 – Results structure**

The information contained in every result, starting from the box in the top left corner of Fig 13, comprises:

- The operation state.
  - The patient's last name and name.
  - The name of the operating surgeon
  - The hospital unit which requested the operation.
  - The operation date.
  - The first visit date.
  - Any missing requirements (see paragraph 4.2.1 for details on this item).
  - The scheduled room.
- 
- Any priority assigned to the operation.
  - Any degree of urgency specified.
  - The type of operation.
  - The scheduled duration of the operation.
  - The hospitalization unit.
  - The suggested date for the operation.
  - The last visit date
  - Any necessary requirements (see paragraph 4.2.1 for details on this item).

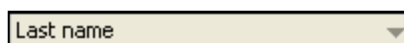
The results can be sorted based on the criteria specified inside the box by simply clicking the box. If, for example, you click the “Last name” box, it will appear like this (Fig 14).



**Fig 14**

In this case the search results will be arranged by last name in alphabetical order (from A to Z).

If you click the same box again, it will appear like this (Fig 15).



**Fig 15**

In this case the search results will be arranged, again, by last name in alphabetical order but from Z to A.

Every box on the bar shown in Fig 13 can be clicked to display the results in the preferred order.

Click the ⓘ icon present on every row (Fig 16),



**Fig 16**

to open a window containing the main data relating to the operation (Fig 17).

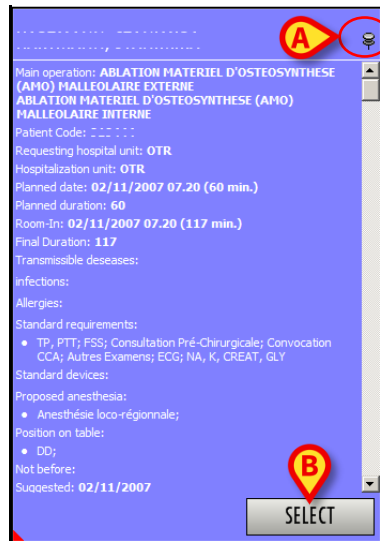





Fig 17 – “Operation data” window

Click the **Select** button in the window (Fig 17 B) to access the “Operation Record” relating to the operation (Fig 49, paragraph 5).

The window disappears automatically as soon as the mouse is moved; click the “thumbtack” in the top right corner of the window (Fig 17 A) to fix the window to the screen.

The ● icon possibly appearing before the patient’s name means that the operation was planned for a day in the past but still is not executed.

The three icons , , and  possibly placed before the patient’s name indicate that the operation is locked at the level indicated by the icon itself. See paragraph 2.3 for an explanation of the “lock/unlock operation” functionalities in the Smart Scheduler system.

#### 4.2.1 Missing requirements and necessary requirements

A “requirement” may be any document necessary to the progress of the operation procedure (e.g., the result of a medical examination or a patient consent form).



Fig 18

The “Missing requirements” box (Fig 18 A) indicates the documents that have to be obtained while the operation is in its current state and the documents which should have been obtained while the operation was in a previous state. The items indicated in this area are the product of procedures which have not yet been completed.

The “Requirements” box (Fig 18 B) indicates correctly obtained documents, documents which have not been obtained because the procurement procedure has failed (these are not classed as “missing” because the procurement procedure has been completed, but has had a negative outcome) and documents which must be obtained in a state subsequent to that currently held.

The information related to the missing requirements and the requirements needed for the operation can appear highlighted in different colors.

The color, if present, provides information on the group of requirements requested. This information will be presented in more detail on the subsequent “Operation Record” page (Fig 119, see paragraph 7.3).

The colors have the following meanings.

If the area is highlighted red (Fig 19), at least one of the requirements is missing because the procurement procedure has failed (e.g. failed exam or consent denied).

Foreseen	Test	Patient	AMB	18/02/2008	130	Unknown
	Ablation de pontage (Axillo femoral)	AMB	18/02/2008	TP, PTT; ECG; FSS		

**Fig 19 - Patient requirements color code -1**

If the area is highlighted orange (Fig 20), one of the missing requirements should have been obtained in the previous state (i.e., the operation procedure has progressed even though one of the requirements should have been satisfied earlier).

Complete			CHT	23/01/2008	18/01/2008	Transfert SMIA; CPC	300	Unknown
	OPERATION POUR TUMEUR DE PANCOAST EN THORACO...	BH05 - 10	CHT	24/01/2008	18/01/2008			

**Fig 20 – Patient requirements color code -2**

If the area is highlighted green (Fig 21), at least one of the requirements has been obtained successfully (and none of the requirements are missing because the procurement procedure has failed, otherwise the area would be highlighted in red).

Scheduled			CHP	05/02/2008	06/11/2007		20	Unknown
	Destruction de peau par rayon laser	BH07 - 26	CHP	05/02/2008	06/11/2007	Coordination par le DMCP (CHP)		

**Fig 21 – Patient requirements color code -3**

If the area is not highlighted (Fig 22), the patient is waiting for the necessary documentation.

Request...			OTR	21/12/2007	60	Unknown
	83141.0 MENISCECTOMIE ARTHROSCOPIQUE DU GENOU		OTR	07/02/2008	21/12/2007	Consultation Pré-Chirurgicale

**Fig 22 - Patient requirements color code - 4**

## 4.2.2 Reserves

Reserves are those operations for which either no time, no block or no room has been assigned, but which are included in the daily schedule.

The Smart Scheduler system envisages three types of reserve:

- Room reserve – The operation has been assigned an operating room but not a time.
- Block reserve – The operation has been assigned a surgical block but not a room and a time.
- General reserve – No time, room or block have been assigned to the operation.

The “Operation List” page uses special icons to indicate whether one of the operations on the list is a reserve.

Room reserves are identified by the  icon (Fig 23).




Fig 23 – Room reserve

Block reserves are identified by the  icon (Fig 24).



Fig 24 – Block reserve

Generic reserves are identified by the  icon (Fig 25).

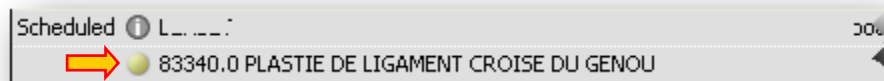






Fig 25 – Generic reserve

## 4.3 The “Operation list” screen command bar

It is possible to perform various procedures with the items displayed on the “Operation list” screen. These procedures are performed using the buttons on the command bar (Fig 26). This paragraph lists briefly the functions of the different buttons. They will be described in detail in the indicated paragraphs.



Fig 26 - Command bar

	Use this button to create a new operation. See paragraph 4.3.1 for the procedure.
	Use this button to display the data of an existing operation. See paragraph 4.3.2 for the procedure.
	Use this button to cancel or annul an existing operation. See paragraph 4.3.3 for the procedure.
	Use this button to change the operation state. See paragraph 4.3.4 for the procedure.



Use this button to lock/unlock a scheduled operation. See paragraph 4.3.5 for the lock/unlock procedure when used on the “Operation list” screen.



Use this button to create the appropriate print reports.



*The buttons on the command bar are enabled or not depending on the screen content (some procedures are not possible in some contexts) and on the logged user permission level (the users can perform only the actions for which they are entitled).*

### 4.3.1 Creating a new operation record

To create a record for a new operation (new operation creation)

- click the **New** button on the command bar (Fig 27).



Fig 27

The patient search and selection software currently in use will open.

#### **Patient management.**



*The patient archives management tools can change depending on the modules installed, on the user needs, on the chosen configuration etc. The related procedures change accordingly.*

*The DIGISTAT® module “Patient Explorer” was explicitly created to manage the patient archives. Please refer to the “Patient Explorer” module documentation for the related procedures.*

*If the DIGISTAT® module “Patient Explorer” is not installed the patient management functions are performed by “Control Bar”. When this is the case, the related procedures are described in the specific documentation.*

*If the patient archives management tool in use is not part of the DIGISTAT® environment please refer the relevant technical documentation.*

- Select the patient for which the new operation is being created.

The “Operation record” screen will open (Fig 28). The patient data will appear in the relevant fields (Fig 28 A).

The “Operation Record” screen is described in paragraph 5.

Fig 28 – Operation record

- Fill the operation record with all the relevant data. See paragraph 5 for all the detailed information.
- Click the **Update** button on the command bar.

A new “Operation record” is this way recorded. The operation is in “Foreseen” state.



*The “Operation Record” can be recorded with no other data than the patient data. In this case the operation will be in “Foreseen” state. To go further to “Requested” state the name of the main operation and the planned duration at least must be specified.*

*See paragraph 2.2 for a description of the operation states managed by the “Smart Scheduler” system.*

#### 4.3.1.1 Creating a new operation with provisional data

There may be a case in which an operation has to be created for a brand new patient; a patient whose data is not stored in the databases of the structure where you are operating.

In these cases, the procedure envisages the recording of the patient’s data first of all, and then the creation of the new operation.



For various reasons (the particular urgency of the operation, for example) it may be better to proceed directly with the creation of the operation with DIGISTAT® “Smart Scheduler” and then, later, to record the patient’s data.

In this case, it is necessary to open an operation record with provisional data.



*This possibility depends on a configuration parameter. The system can be configured in a way that inhibits the creation of interventions with provisional data. Please refer to your system administrator to know the details of the configuration in use.*

To create an operation record with provisional data

- click the **New** button on the command bar (Fig 27).

The patient search and selection software will open.

- Close the patient search and selection software.

The completely empty “Operation Record” will open, lacking any data relating to the patient (Fig 29).

**Fig 29 – Operation record with provisional data**

- Enter all the known data of the patient and the operation.



*To save a record with provisional data, the only mandatory data is the patient’s name and last name.*

- Click the **Update** button on the command bar.

The new record will be saved by the Smart Scheduler system as a provisional record.

The red exclamation mark towards the top left of the page (Fig 29 A) warns that the patient’s data is provisional.

Once the record has been saved, the exclamation mark is also displayed on the “Operation List” page (Fig 30 A).

Status	Last name	First
Urgency	Operation	
Foreseen	Patient	Pro

**Fig 30**

The exclamation mark on this page can be clicked to display the window containing the main information on the operation (Fig 31).

**Fig 31**

The icon highlighted in Fig 31 **A** indicates that the information window refers to an intervention with provisional data.

Click the **Select** button in the window (Fig 31 **B**) to access the “Operation Record” screen relating to the operation (Fig 49)

The window disappears if clicked again.

#### 4.3.1.2 How to make the data of a record final

To make the data of a provisional record final

- Access the provisional operation record (to do that double click the corresponding line on the “Operation List” screen - Fig 2).
- Click the **Edit** button (Fig 32).



**Fig 32 - “Operation record” screen command bar**

The screen will turn to “Edit” mode. I.e. data entry will be enabled.

- Click the “Patient Code” field (Fig 33 A), or the **Patient** button on Control Bar (Fig 34).

The screenshot shows a patient data entry form titled 'Patient:'. It contains several fields: 'Last name', 'First name', 'Patient code' (highlighted with a red circle and a red exclamation mark icon labeled 'A'), 'Insurance', 'Birth date', 'Current age', 'DIGISTAT® Code', 'Sex', 'Admission code', and 'Admission date'. The 'Patient code' field is the focus of the instruction.

Fig 33

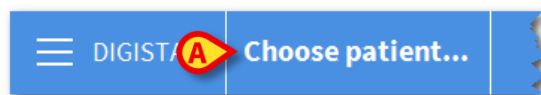


Fig 34

The patient management software in use will open (DIGISTAT® “Patient Explorer”, for instance).

- Enter the patient’s data.

The patient’s operation record (see Fig 49 for an example) will open again, containing the final data.

In this way, all the patient’s data contained in the database are transferred to the operation record which is no longer provisional (the exclamation mark is no longer present).



*If the data contained in the DIGISTAT® registry differ from those present in other systems in use of which DIGISTAT® is “Slave”, the red exclamation mark may remain after the data are made final. This feature signals the possible differences between the DIGISTAT® registry and the data of the other systems in use.*

### 4.3.2 How to display an “Operation record”

To display a specific record, on the “Operation list” screen (Fig 35),

- search for the wanted record using the procedures described in paragraph 4.1.

The corresponding row will appear on screen.

- Click the row.

The row will be highlighted (Fig 35 A).

Filters

Last name:  First name:  Last name:  First name:

Patient Code:

Temporary ID:

Reservation Code:

Operation:

Admission Code:

H.U.:

Block:  Room:

Requirements:  Status:

1er OP:

First Visit Date:  To:

Latest Visit Date:  To:

Suggested date:  To:

Operation date:  To:

Status:

Reserve:  Insurance:

Priority:  Emergency:

Confirmed by:  Surgeon:  Anesthesiologist:  Programme manager:

My operations:

CLEAR SEARCH

State	Last name	First name	1er OP	Hospital Unit r...	Operation...	First visit...	Missing requirements	Room	Priority
Complete	ANCHORAGE MUNICIPALITY	CHIAVARI	CITRUS HEIGHTS...	URO	08/10/2007	10/09/2007		BH05 - 23	Inconnue
Complete	ARCADIA	CHIAVARI	URO	URO	03/03/2008	29/02/2008		BH05 - 23	Inconnue
Complete	ATHENS-CLARKE COUNTY (BALANCE)	CHIAVARI	COLORADO SPRIN...	CHV	23/10/2007	22/10/2007		BH05 - 6	Inconnue
Resche...	ATHENS-CLARKE COUNTY (BALANCE)	CHIAVARI	CHV	CHV	22/10/2007	19/10/2007		BH05 - 2	Inconnue
Complete	BAY	CHIAVARI	LEXINGTON-FAYET...	CHP	11/02/2010	11/02/2010		HEL - E2	
Niveau 1...	INCISION DRAINAGE ABCE-AUTRE (86.04)	CHIAVARI	URO	URO	22/12/2009	30/11/2009	Convocation HEL	BH07 - AL...	
Complete	BELOIT	CHIAVARI	TAYLOR Yassine	URO	22/12/2009			BH07 - AL...	
Complete	BELOIT	CHIAVARI	TAYLOR Yassine	URO	29/01/2010	05/01/2010		BH07 - AL...	
Complete	BEVERLY	CHIAVARI	SIERRA VISTA Rud...	CCV	15/01/2010	12/01/2010		BH05 - 4	
Complete	BEVERLY	CHIAVARI	SIERRA VISTA Rud...	CCV	14/01/2010			BH05 - 15	
Niveau 1...	EMBOLECTOMIE / THROMBECTOMIE / RETRAIT CORPS ETRANGER ARTEREMI...	CHIAVARI	CITRUS HEIGHTS...	CHT	05/01/2010	05/01/2010	Transfert SC	BH05 - 10	Inconnue
Complete	BEVERLY HILLS	CHIAVARI	CITRUS HEIGHTS...	CHT	19/11/2008	05/11/2008	STOBANQUE;Transfert SC	BH05 - 10	Inconnue
Complete	BEVERLY HILLS	CHIAVARI	CITRUS HEIGHTS...	CHT	19/11/2008			BH05 - 10	Inconnue
Complete	BEVERLY HILLS	CHIAVARI	CITRUS HEIGHTS...	CHT	29/10/2008	06/10/2008	STOBANQUE;Transfert SC	BH05 - 10	Inconnue
Complete	BINGHAMTON	CHIAVARI	MONTCLAIR Alexa	PED	29/10/2008	06/10/2008		BH07 - AL... 6	
Complete	COLOSCOPIE FLEXIBLE (45.23)	CHIAVARI	URO	URO	08/07/2010	03/06/2010		BH07 - AL...	
Complete	BROOKLYN PARK	CHIAVARI	SANTA ROSA Jean...	CHV	18/11/2009	26/10/2009	Coordination DMCP	BH05 - 2	
Complete	RESECTION ANTERIEUR BASSE (48.63)	CHIAVARI	URO	URO	18/11/2009	06/11/2009	STOBANQUE;Transfert SC	BH05 - 2	
Complete	BUFFALO GROVE	CHIAVARI	SANTA ROSA Nicolas	CHP	05/06/2008	30/04/2008	Convocation BH 07;Coo...	BH07 - AL... Inconnue	
Complete	AUTRE INTERVENTION HORS LISTE (CHP)	CHIAVARI	URO	URO	05/06/2008	30/04/2008		BH07 - AL... Inconnue	
Complete	CARPENTERSVILLE	CHIAVARI	ROUND ROCK Viorel	ORL	27/06/2008	16/06/2008		BH07 - AL... Inconnue	
Complete	CECOPHAGOSCOPE	CHIAVARI	URO	URO	27/06/2008	16/06/2008		BH07 - AL... Inconnue	
Complete	CARY	CHIAVARI	ARLINGTON Eric	TRA	19/10/2010	14/10/2010	Consentement;CPC;HD...	HO - P. Flux	
Niveau 1...	ARTHROPLASTIE DE LA MANCHE (DROITE) (81.51)	CHIAVARI	URO	URO	19/10/2010			BH05 - 15	

NEW SHOW DELETE CHANGE LOCK REPORTS

Fig 35 - Operation list

- click the **Show** button on the command bar (Fig 35 B).

The corresponding "Operation record" will open (Fig 36).

A Patient: BROOKLYN PARK, CHIAVARI

Last name:  First name:

Patient code:  Insurance:

Birth date:  Current age:  Sex:

Admission code:  Admission date:

Localisation:  AssuranceType:

First visit date:  Last visit date:

Admission day:  Planned LOS:

Place of Convocati...:  Convocation date:  Convocation Time:

B Operation: RESECTION ANTERIEUR BASSE (48.63)

Diagnosis:

Main operation:

Secondary operati...:

Description:

Notes:

Not before:  Suggested date:

Infections:

Transmissible dise...:

Allergies:

Proposed anesthe...:  Surgical time:

Priority:  Pre time:  Post time:

Approach site:  Emergency level:

Position on table:  Second position:

Confirmed by:

Date: 18/11/2009 Hour: 07.10 Operating Block: BH05 Room: 2

NEW EDIT DELETE CHANGE COMPLETE LOCK REPORTS CLOSE

Fig 36 - Operation Record



You can also double-click the relevant row to open the corresponding “Operation record”.

### 4.3.3 How to either delete or annul an operation

To either delete or annul an operation record, on the “Operation list” screen (Fig 37),

- search for the wanted record using the procedures described in paragraph 4.1.

The corresponding row is displayed.

- Click the row.

The row is this way highlighted (Fig 37 A).

Fig 37 - Operation list

- Click the **Delete** button (Fig 37 B).

A menu containing two options opens (Fig 38).

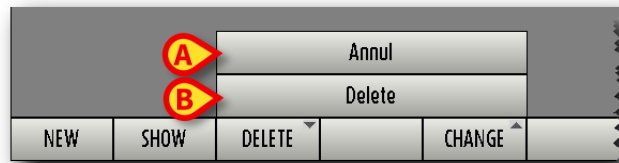


Fig 38

*Annul* - Use the “Annul” option (Fig 38 A) to annul the selected operation.

After clicking on “Annul” the following window opens, requesting to specify the annulment reason (Fig 39).

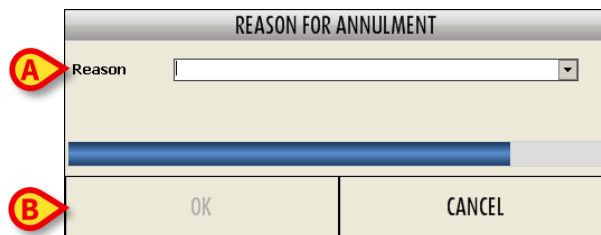


Fig 39

- Enter the reason for annulment in the “Reason” field (Fig 39 A).
- Click **Ok** to annul the operation (Fig 39 B).

The selected operation is this way annulled. Annulling an operation is an irreversible administrative procedure indicating that the operation will not be managed in any way by any hospital unit. The operation record will be still visible in read-only mode as “Annulled operation”.

*Delete* - Use the “Delete” option (Fig 38 B) to delete the operation highlighted.

After clicking on “Delete” the following window opens, requesting to specify the deletion reason (Fig 40).

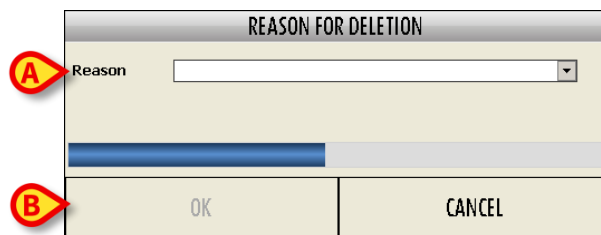


Fig 40

- Enter the reason for deletion in the “Reason” field (Fig 40 A).
- Click **Ok** to delete the operation (Fig 40 B).

Operation deletion permanently deletes the operation data. The “Operation record” disappears from the DIGISTAT® Smart Scheduler system. This procedure can only be used only in case of wrong or double operation records.

### 4.3.4 Changing the operation state

The **Change** button on the “Operation list” screen command bar makes it possible to change the state of an operation.

To change the operation state

- search for the operation whose state must be changed using the procedures described in paragraph 4.1.

The corresponding row will appear on screen.

- Click the row.

The row will be highlighted (Fig 41 A).

State	Last name	First name	Planned duration	Hospitalization Unit	Operation	First visit	Last visit	Missing requirements	Room	Priority
Foreseen			60	CCV	IMPLANTATION PACE MAKER ENDOVEINEUX SIMPLE CHAMBRE					Normale
Foreseen			0	TRA	AMO TIBIA (GAUCHE) (78.67)					
Foreseen			15	CCV	Bronchofibroscopie par trachéostomie (Examens trachée, bronches, thorax)					
Foreseen			0	TRA	REDUCTION FERMEE ET OSTEOSYNTHESE RADIUS DISTAL (GAUCHE) (79.12)					
Foreseen			150	CHT	BILLOBECTOMIE SUPERIEURE THORACOTOMIE (GAUCHE) (32.4)			CPC/Transfert SMA	6	
Foreseen			60	CHP	CORRECTION CICATRICE (86.84)			Convocation CCA		
Foreseen			30	CHV	CLURE D'HYPEROÏDES SELON MILLIGAN MORGAN					Inconnue
Foreseen			30	URO	VASECTOMIE BILATERALE (63.73)					
Foreseen			180	CHV	AUTRE INTERVENTION HORS LISTE (CHV)					Inconnue
Foreseen			0	CHUV	AUTRE INTERVENTION HORS LISTE (CHV)					
Foreseen			0	OTR	AUTRE INTERVENTION HORS LISTE (CHP)					Inconnue

Fig 41 - Operation list

- Click the **Change** button (Fig 41 B).

The menu shown in Fig 42 will open.

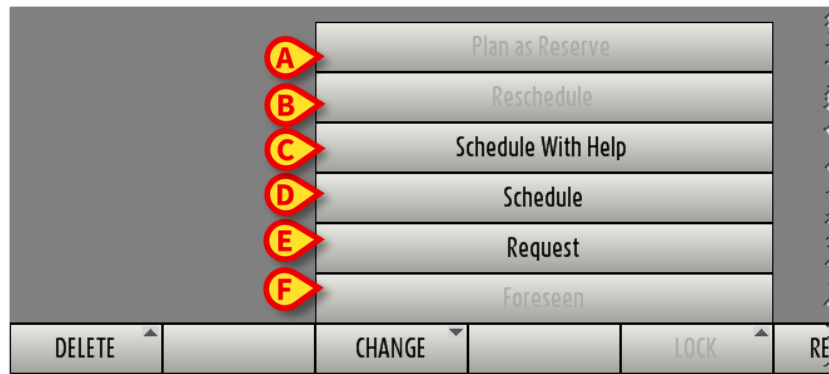


Fig 42 – “Change” button



On the menu shown in Fig 42 the buttons can be either enabled or disabled depending on the state and the characteristics of the selected operation. Only the procedures that are coherent with the selected operation will be enabled.

If the **Change** button is not active it is not possible to change the state of the selected operation.

- Plan as reserve (Fig 42 A).

The “Plan as reserve” option enables to quickly manage the urgent operations. The option is enabled only if the highlighted operation is marked as “Emergency level I” and is not already scheduled. The emergency level is specified by the appropriate field on the “Operation record” screen (see Fig 49).

After clicking this option the system requests to specify the date and the block of the operation. The window shown in Fig 43 appears.

Fig 43

- Specify the block and the date.
- Click **Ok**.

The operation will be directly scheduled as block reserve for the specified date and block. See paragraph 8.5.5 for an explanation of the meaning of “reserve” in the Smart Scheduler System

- Reschedule (Fig 42 B)

The “Reschedule” option enables to change the selected operation schedule. This option is active only if the chosen operation is already planned. The procedure is described in paragraph 8.5.3.



- Schedule with help (Fig 42 C)

The “Schedule with help” option enables to access the “Schedule with help” screen to schedule the selected operation (Fig 227, see paragraph 8.7).

- Schedule (Fig 42 D)

The “Schedule” option enables to access the “Schedule” screen to schedule the operation (Fig 169, paragraph 8).

- Request (Fig 42 E)

The “Request” option changes the operation state to “Requested”. See paragraph 2.2 for the explanation of “Operation state”.

- Foreseen (Fig 42 F)

The “Foreseen” option changes the operation state to “Foreseen”. See paragraph 2.2 for the explanation of “Operation state”.



*It is possible to select numerous operations at the same time on the “Operation list” screen. In order to do that, click the corresponding row while keeping the **Ctrl** key pressed on the workstation keyboard. All the clicked rows will be highlighted.*

### 4.3.5 Locking and unlocking an operation

---

Use the **Lock** button to either lock or unlock a scheduled operation. A locked operation cannot be rescheduled. Only the operation scheduled for the current day and for the future days can be locked/unlocked, not those that were scheduled for a day in the past and have not been executed yet. In these cases the **Lock** button is not active.

To lock/unlock an operation

- search for the operation that must be locked/unlocked using the procedures seen in paragraph 4.1.

The corresponding row will appear on screen.

- Click the corresponding row.

The row will be highlighted (Fig 44 A).

**OPERATION LIST**

Filters

Last name:  First name:  lock

Patient Code:

Temporary ID:

Reservation Code:

Operation:

Admission Code:

H.U.:

Block:  Room:

Requirements:  Status:  All

1er OP:

First Visit Date:  To:

Latest Visit Date:  To:

Operation date:  To:

Status:  All

Reserve:  Both

Priority:

Emergency:

Confirmed by:  Surgeon  Anesthesiologist  Programme manager

My operations: ☐

State	Last name	First name	1er OP	Hospital Unit r...	Operation...	First visit...	Missing requirements	Room	Priority
Scheduled									
Complete									
Complete									
Niveau 1 (<...									

NEW SHOW DELETE CHANGE LOCK REPORTS

**Fig 44 - Operation list**

- Click the **Lock** button (Fig 44 B).

The following menu will open (Fig 45).

Lock level 1

Lock level 2

Lock level 3

Unlock level 1

Unlock level 2

Unlock level 3

CHANGE LOCK REPORTS

**Fig 45 - Lock/Unlock operation**

Three lock levels are possible in the configuration here explained (Fig 45).

See paragraph 2.3 for a detailed explanation of the goals and features of the lock/unlock functionalities.

Only certain procedures are enabled for the logged user, depending on his/her permission level and the current context.

In Fig 45, for example, the user has the possibility to lock level 1, 2, 3 an unlocked operation (Fig 44 A).

- Click the wanted option on the menu.

A specific icon is placed on the row corresponding to the operation to indicate that it is locked (Fig 46).

**Fig 46 - Operation locked level 1**

-  - level 1 lock;
-  - level 2 lock;
-  - level 3 lock.

*The options triggered by the **Delete**, **Change** and **Lock** buttons can also be activated by right-clicking the row corresponding to the relevant operation. A menu containing the different options described in this chapter will open (Fig 47).*



The “More information” option on the menu displays the window seen in Fig 17.

### 4.3.6 Printing documentation

---

The **Reports** button on the command bar enables the creation of a document containing the data of the patients and operations in the database.



Fig 48 – Operation list screen command bar

To create the document

- Click the **Reports** button.

Several options are displayed. Their number and their kind depend on the configuration in use.

- Click the wanted option.

A print preview is displayed.

# 5 Operation Record: main features

The “Operation Record” (Fig 49) page contains all the available data of an operation.

The screenshot shows the 'Operation Record' page for a patient named Brooklyn Park, Chiavari. The page is divided into several sections, each identified by a letter in a yellow circle:

- A**: Patient information section, including last name, first name, patient code, insurance, birth date, current age, sex, admission code, admission date, localisation, assurance type, first visit date, last visit date, admission day, planned LOS, place of convocation, convocation date, and convocation time.
- B**: Operation information section, including diagnosis, main operation, secondary operation, description, notes, not before date, suggested date, infections, transmissible disease, allergies, proposed anesthesia, priority, pre time, surgical time, post time, approach site, emergency level, position on table, second position, confirmed by, date, hour, operating block, and room.
- C**: A vertical sidebar on the right side of the page.
- D**: A set of navigation buttons at the bottom right of the page.
- E**: A set of navigation buttons at the top right of the page.

The page also features a bottom bar with buttons for NEW, EDIT, DELETE, CHANGE, COMPLETE, LOCK, REPORTS, and CLOSE.

Fig 49 – Operation Record

## 5.1 Page structure

The page is divided into 5 sections.

Every section is identified by a letter and by a title indicating the type of information contained.

The five sections are:

- “Patient” section. This section contains information relating to the patient (name, last name, birthdate etc.).
- “Operation” section. This section contains information relating to the operation (type, duration, diagnosis etc.).
- “Requirements” section. This section contains information relating to the requirements necessary to the operation (necessary documents, medical examinations to be carried out etc.).

- D. “Planned Staff” section. This section contains information relating to the personnel who will be involved in the operation.
- E. “Special Services” section. This section contains information relating to any specific services or machinery required for the operation.
- F. “Materials”. This section makes it possible to schedule the necessary materials required for the operation.

The sections are separated from each other by horizontal gray bars (Fig 49 A).

Click on one of the bars to close or open the section below (Fig 50).



**Fig 50 – “Closed” sections**

Fig 50 shows a page where all the sections have been closed.

Click the bar again to reopen the section below (Fig 51).

Short name	Description	ToDo	In progress	Pass	Fail	NA	Date	Notes
BIOBANQUE	Prélèvement pour la biobanque	●						
Transfert SC	Transfert aux soins continus	●						



**Fig 51 – “Patient” and “Requirements” areas**

Fig 51 shows a page where only the “Patient” and “Requirements” sections have been reopened.

The buttons in the top right corner of the page (Fig 49 B, Fig 52) make it possible to directly access the different sections.



**Fig 52**



Click button , for example, to directly access the “Requirements” area, or click button  to directly access the “Planned Staff” area.



The  button closes all sections.


The  button expands all sections.

The bar on the right side of the screen makes it possible to scroll up and down the page (Fig 49 C).

The arrow buttons in the bottom right corner perform the same function (Fig 49 D).

The  and  buttons make it possible to move slowly up and down.

The  and  buttons make it possible to move quickly up and down.

The  button makes it possible to return the beginning of the page.

The navigation bar in the top left corner of the page indicates the path followed to reach the current page, the type of operation envisaged and the patient’s name. (Fig 49 E, Fig 53).



**Fig 53 – Navigation Bar**

Fig 53 indicates we passed from the “Operation List” page to the “Operation Record” page of the patient and operation specified.

## 6 Operation Record: procedures and functionalities









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The page control bar (Fig 49 , Fig 54) contains various buttons which make it possible to perform various operations.



Fig 54 – “Operation Record” command bar

This paragraph lists briefly the main functionalities of each button. The related procedures are described in the paragraphs indicated.

	Click this button to create a new operation record. See paragraph 4.3.1 for the related procedures.
	Click this button to edit the data displayed on screen. After clicking the <b>Edit</b> button the operation record turns to “edit” mode. See paragraph 6.1.
	Click this button to either delete or annul an existing operation. See paragraph 6.2.
	Click this button to change the operation state. See paragraph 6.3.
	The central part of the command bar is not a button. It displays the current state of the selected operation record.
	Click this button to either lock or unlock a planned operation. See paragraph 6.4.
	Click this button to create different kinds of print reports. See paragraph 6.5
	Click this button to close the “Operation record” screen.

### 6.1 How to edit the “Operation Record”

---

The **Edit** button (Fig 55) makes it possible to edit the page.



Fig 55 – Operation record screen command bar

Every time you decide to change something on the “Operation record” page, whether you wish to add information or change information already registered, it is necessary to click the **Edit** button.

When you click the **Edit** button, the control bar changes its appearance (Fig 56).





Fig 56 – Command bar in “Edit” mode

In Fig 56 you can see that:

- The **New** button is no longer active (so in this situation you cannot create a new record).
- The **Edit** button is selected (meaning that the screen is in “edit mode”).
- The **Change** button is active (you can change the operation state or scheduling).
- The **Reports** button is no longer active.
- The **Close** button disappeared and was replaced by the two buttons **Cancel** and **Update**.

After making the changes required to the page, it is necessary to

- click the **Update** button to save the changes.

After that, the **Edit** button is deselected and the control bar returns to the appearance shown in Fig 54.

## 6.2 Deleting/annulling an operation record

The **Delete** button opens a menu containing two options (Fig 57).

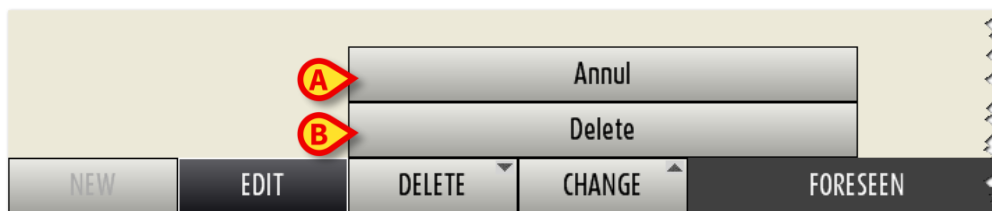


Fig 57

*Annul* - Use the “Annul” option (Fig 57 A) to annul the operation.

After clicking on “Annul” the following window opens, requesting to specify the annulment reason (Fig 58).

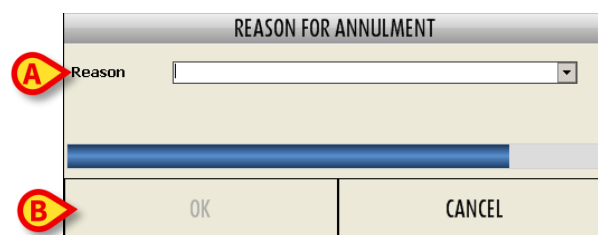


Fig 58

- Enter the reason for annulment in the “Reason” field (Fig 58 A).
- Click **Ok** to annul the operation (Fig 58 B).

The selected operation is this way annulled. Annulling an operation is an irreversible administrative procedure indicating that the operation will not be managed in any way by any hospital Unit. The operation record will be still visible in read-only mode as “Annulled operation”.

*Delete* - Use the “Delete” option (Fig 57 B) to delete the operation.

After clicking on “Delete” the following window opens, requesting to specify the deletion reason (Fig 59).

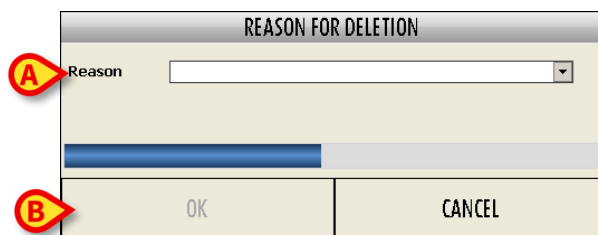


Fig 59

- Enter the reason for deletion in the “Reason” field (Fig 59 A).
- Click **Ok** to delete the operation (Fig 59 B).

The selected operation record is this way deleted. Operation deletion permanently deletes the operation data. The “Operation record” disappears from the DIGISTAT® Smart Scheduler system. This procedure should only be used in case of wrong or double operation records.

## 6.3 Changing the operation state

---

The **Change** button makes it possible to change the operation state.

To change the operation state,

- click the **Edit** button on the command bar (Fig 60).



Fig 60 – Operation record command bar

The screen turns to “edit” mode. The command bar changes in the way shown in Fig 61.



Fig 61 – Command bar in “Edit” mode

- Click the **Change** button

The menu shown in Fig 62 opens.

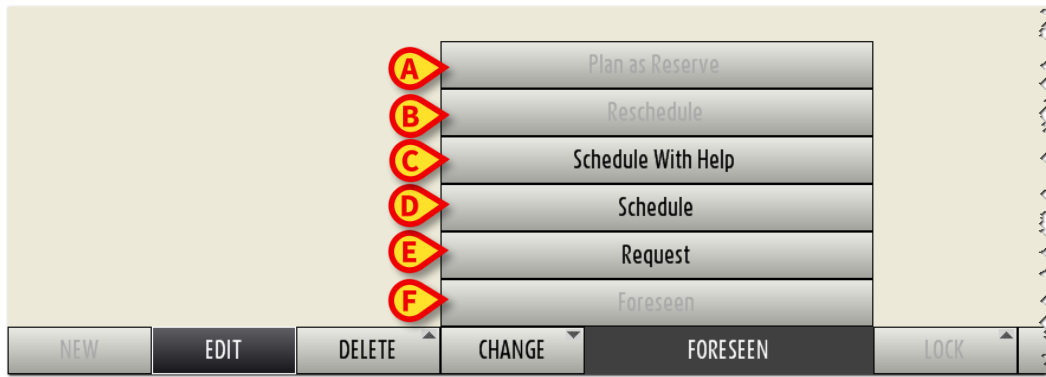


Fig 62 – “Change” button



*On the menu shown in Fig 62 the buttons can be either enabled or disabled depending on the state and the characteristics of the selected operation. Only the procedures that are coherent with the selected operation are enabled.*

*If the **Change** button is not active it is not possible to change the state of the selected operation.*

- Plan as reserve (Fig 62 A).

The “Plan as reserve” option makes it possible to quickly manage the urgent operations. This option is enabled only if the highlighted operation is marked as “Emergency level I” and is not already scheduled. The emergency level is specified by the appropriate field on the “Operation record” screen (see Fig 112).

After clicking this option the system requests to specify the date and the block of the operation. The window shown in Fig 63 appears.

Fig 63

- Specify the block and the date.
- Click **Ok**.

The operation will be directly scheduled as block reserve for the specified date and block. See paragraph 8.5.5 for an explanation of the meaning of the term “reserve” in the Smart Scheduler System

- Reschedule (Fig 62 B)

The “Reschedule” option makes it possible to change the selected operation schedule. This option is active only if the chosen operation is already planned. The procedure is described in paragraph 8.5.3.

- Schedule with help (Fig 62 C)

The “Schedule with help” option enables to access the “Schedule with help” screen to schedule the selected operation (Fig 227, see paragraph 8.7).

- Schedule (Fig 62 D)

The “Schedule” option enables to access the “Schedule” screen, making this way possible to schedule the operation (Fig 169, paragraph 8).

- Request (Fig 62 E)

The “Request” option changes the operation state to “Requested”. See paragraph 2.2 for the description of the “Operation states”.

- Foreseen (Fig 62 F)

The “Foreseen” option changes the operation state to “Foreseen”. See paragraph 2.2 for the description of the “Operation states”.

## 6.4 Locking/Unlocking the operation

---

The **Lock** button makes it possible to either lock or unlock a scheduled operation. A locked operation cannot be rescheduled.

Only the operations scheduled for either the current day or the future days can be locked. The operations scheduled for a day in the past and not yet executed cannot be locked.

To lock/unlock an operation

- click the **Edit** button on the command bar (Fig 64).



Fig 64 – Operation record command bar

The screen turns to “edit” mode. The command bar changes in the way shown in Fig 65.



Fig 65 – Command bar in “Edit” mode

- Click the **Lock** button (Fig 65).

The following menu opens (Fig 66).

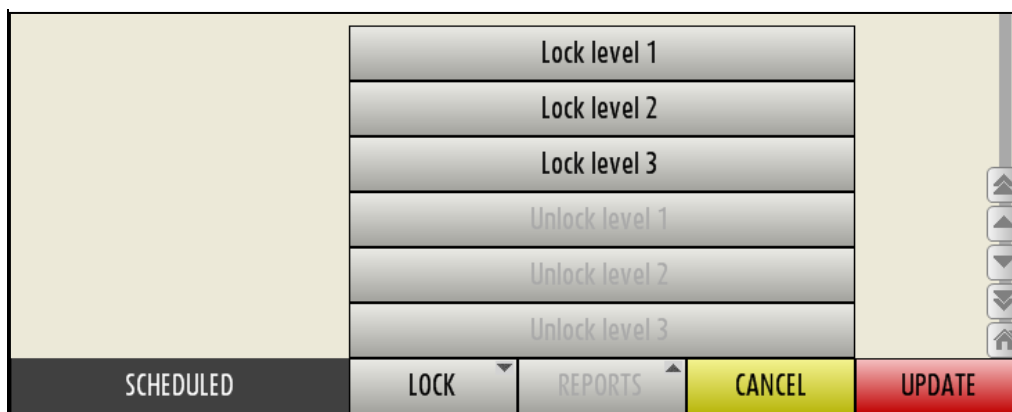


Fig 66 - Lock/Unlock operation

There are three possible lock/unlock levels. Each hospital decides - by configuration - how many lock/unlock levels to use (none, one, two, three). The menu shown in Fig 66 refers to a configuration enabling three lock levels. See paragraph 2.3 for a more detailed description of the lock/unlock functionalities.

Only certain “lock actions” are enabled for the logged user, depending both on the context and on his/her permissions level.

In Fig 66, for example, the user is enabled to lock an unlocked operation level 1,2 or 3.

- Click the wanted option on the menu.

The operation will be locked/unlocked at the corresponding level.

An icon on the top left corner of the “Operation record” signals that the operation is locked (Fig 67).

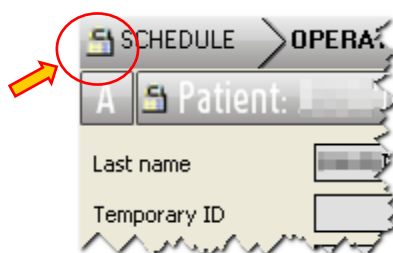


Fig 67 - Locked operation (Operation record screen)

## 6.5 Printing documentation

The **Reports** button on the command bar makes it possible to create a document which reports some of the information managed by the “Smart Scheduler” system.



Fig 68 – Operation record command bar

To create the document

- Click the **Reports** button (Fig 68).

Several options are available. Their number and nature depend on the specific configuration.

- Click the wanted option.

A print preview is displayed.

## 7 Operation Record: description of the different areas of the page

---

The “Operation Record” page is divided into five separate areas. We will analyze them one by one in this paragraph.



*The fields highlighted in pink are required. It is not possible to proceed without specifying a value in these fields. The number and the kind of required fields changes according both to the configuration and to the specific procedures in use.*



*The “Operation record” screen is customizable, i.e. some fields can be either hidden or displayed by configuration. Therefore, the screens actually used in your structure can be slightly different from those displayed here.*

### 7.1 The “Patient” area

---

The “Patient” area contains all the data regarding the selected patient.

**Fig 69 – The “Patient” area**

This data is

- The last name and name.
- Temporary ID

The temporary ID is a code assigned to the patient in the absence of a final patient code.

- ID type

This field requests specification of the type of ID used to temporarily identify the patient.

- Patient code

This is the final patient code assigned when the patient is included in the structure's databases.

- Insurance

This specifies the patient's type of insurance cover (if any).


- DIGISTAT® code

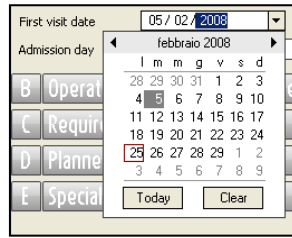
This is the code assigned by the DIGISTAT® systems when a new operation is created.

- Estimated weight
- Estimated height
- Birthdate
- Current age
- Sex
- Admission code
- Admission date
- Location
- Age when operated
- Room number
- Assurance type
- First visit date
- Last visit date





Every time you have to enter a date it is possible, clicking the  arrow next to the field, to enter it using a digital calendar (Fig 71)



**Fig 70 – Digital calendar**

To enter the date, simply click the day required. The corresponding date will automatically appear in the field. Paragraph 4.1.2 describes the digital calendar in detail.

- Admission day
- Envisaged duration of hospitalization (Planned LOS).
- Place of convocation
- Convocation date
- Convocation time



Remember that, to make any change, before making the change you must click the **Edit** button on the command bar.

After making the change, either click the **Update** button to save the new data or click the **Cancel** button to return to the data prior to the change.

## 7.2 The “Operation” area

The “Operation” area displays the information concerning the operation to be performed (Fig 71).

The screenshot shows a software window titled "B Operation". It contains several input fields and checkboxes. Red callout boxes are present: box 'A' points to the "Diagnosis" field, and box 'B' points to the "Main operation" field. The fields include "Diagnosis", "Secondary diagnosis...", "Main operation", "Secondary operation...", "Description", "Notes", "Not before" (with a date picker), "Suggested date" (with a date picker), "Infections", "Transmissible disease...", "Allergies", "Proposed anaesthesia...", "Priority" (dropdown), "Pre time" (input), "Surgical time" (input), "Post time" (input), "Approach site", "Emergency level" (dropdown), "My operation" (checkbox), "Estimated weight" (input), "Position on table", "Second position" (input), and "Confirmed by" with checkboxes for "Surgeon", "Anesthesiologist", and "Programme manager".

Fig 71 – “Operation” Area

The following paragraphs describe the procedures related to the operation data specification.

### 7.2.1 Diagnosis

The “Diagnosis” field makes it possible to specify diagnostic codes according to the most common standards. There are three possible ways of selecting the diagnosis. The one actually used depends on the configuration chosen. All these three methods are described in the following paragraphs. Only one is relevant for the system in use in your structure.


A fourth possibility makes use of the “Free field” and “DIGISTAT® Codefinder” options at the same time.

#### 7.2.1.1 Free field

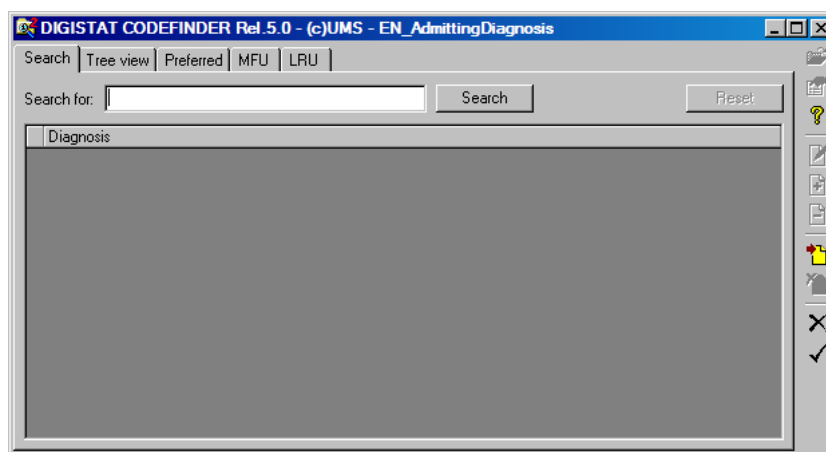
The “Diagnosis” field can be a free field, i. e. an area in which the appropriate text can be freely typed. In this case, to specify the diagnosis, a user can simply click the field and then type the text.

#### 7.2.1.2 DIGISTAT® Codefinder

The DIGISTAT® “Codefinder” software can be used to directly insert the diagnostic codes according to the most common standards. This functionality can be activated by configuration. To use DIGISTAT® “Codefinder”:

- Click the **Edit** button on the command bar.
- Click the  button placed alongside the “Diagnosis” field (Fig 71 B).

The following window opens (Fig 72).



**Fig 72 - Codefinder**

This tool makes it possible to rapidly search and select the wanted diagnostic codes. All procedures and functionalities are described in the user manual, provided with the product. See the DIGISTAT® “Codefinder” user manual to know these procedures and functionalities.

Once the diagnosis is specified, to save the data entered,

- click the **Update** button on the command bar.



*By configuration, the “Free field” and DIGISTAT® “Codefinder” procedures can be used together.*

### 7.2.1.3 DIGISTAT® selection window

The diagnosis can be inserted using a specific DIGISTAT® search and selection window.

To activate this tool

- Click the **Edit** button on the command bar.

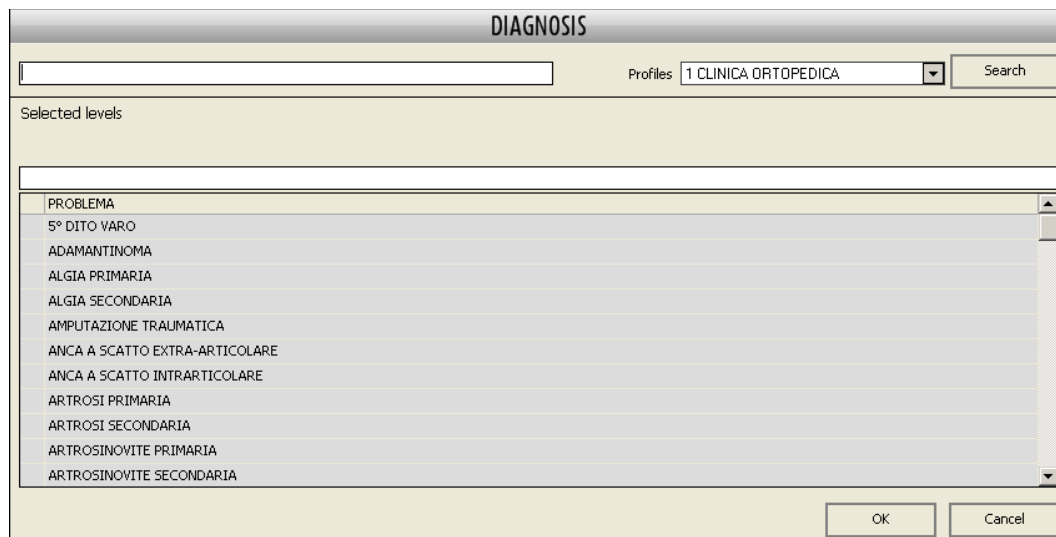
Data entry is this way enabled.

- Enter the first letters of the operation required in the “Diagnosis” field (Fig 71 A).

Otherwise

- click the  button placed alongside the “Diagnosis” field (Fig 71 B).

In both cases the “Diagnosis” window is displayed (Fig 73).

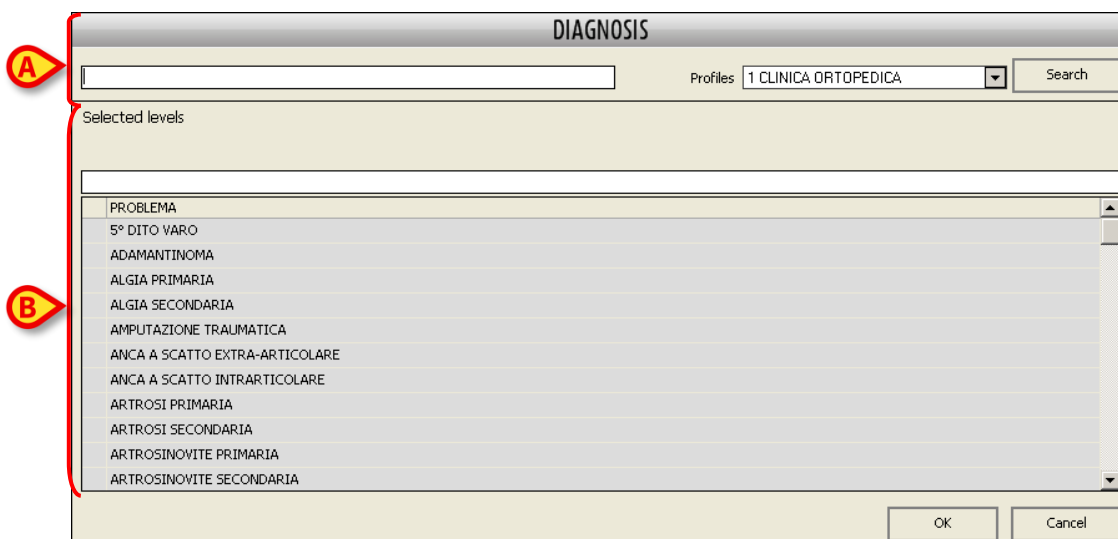


**Fig 73**

This window makes it possible to search the diagnosis coded according to DIGISTAT® parameters.

#### 7.2.1.4 DIGISTAT® diagnosis search and selection

There are two ways to search for a diagnosis: one requires the specification of the diagnosis name (or part of it), one makes it possible to get to the right diagnosis by selecting the appropriate levels on a tree-structure. Both methods are described in the following paragraphs.



**Fig 74**

## 1) Search by name

The upper part of the window (indicated in Fig 74 A and displayed in Fig 75) can be used to search the diagnosis by name.

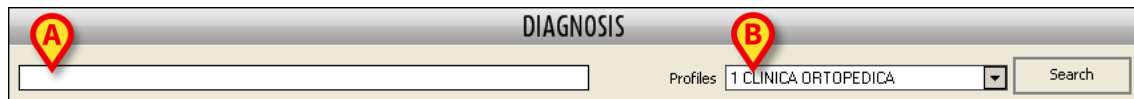


Fig 75

There are two fields in this area. The field on the left (Fig 75 A) makes it possible to specify the name (or part of it) of the wanted diagnosis; the field on the right (Fig 75 B) is a drop down menu making it possible to specify the relevant hospital area. If no area is selected the search is performed on all areas. Each user is enabled to search only the areas for which he/she is qualified.

To perform the search

1. Insert the name (or part of the name) of the diagnosis in the field indicated in Fig 76 A.
2. Either wait for the system to automatically search, or click the **Search** button (Fig 76 B).

All the diagnosis whose name contains the typed characters are displayed (Fig 76 C).

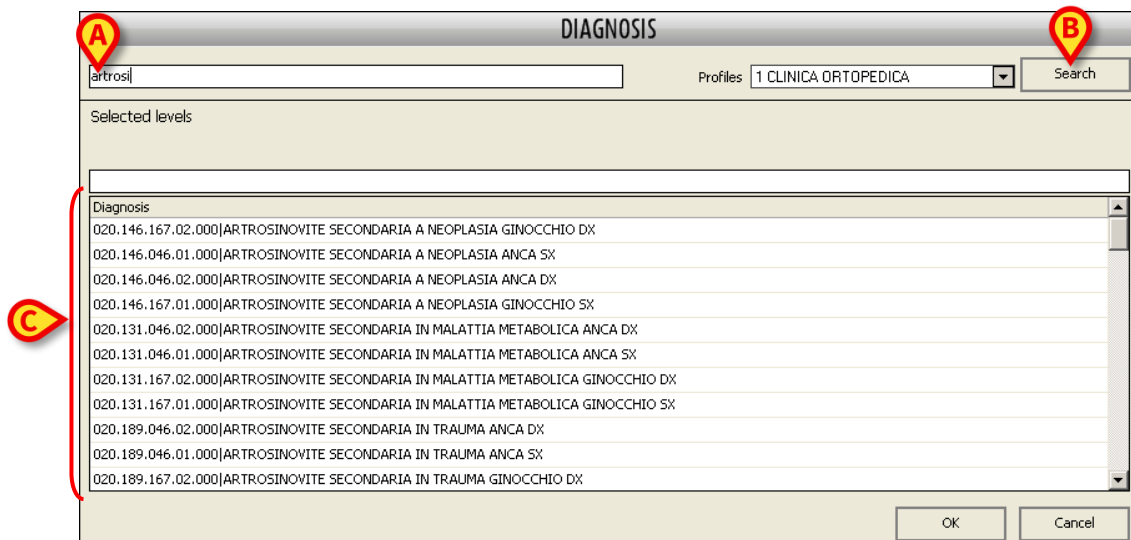


Fig 76

3. Double click the row containing the relevant diagnosis.

The diagnosis is this way inserted in the “Operation record”, in the “Operation” area (Fig 77).

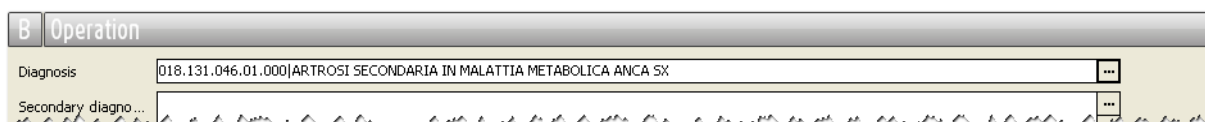


Fig 77

4. Click the **Update** button on the command bar.

## 2) Search by structured levels

The lower part of the window (indicated in Fig 74 **B** and enlarged in Fig 78) can be used to search the diagnosis by selecting successive levels on a tree-structure.



Fig 78

The first level concerns the diagnosis' general area of reference. The filter indicated in Fig 78 **A** can be used to search for the wanted area of reference. In the figure, as example, the word "artrosi" has been specified in the filter. All the areas containing the specified word are displayed in the lower part of the window.

1. Double click the row corresponding to the wanted area. "Artrosi secondaria" is now selected.

The next level is displayed, making it possible to indicate the cause (Fig 79).

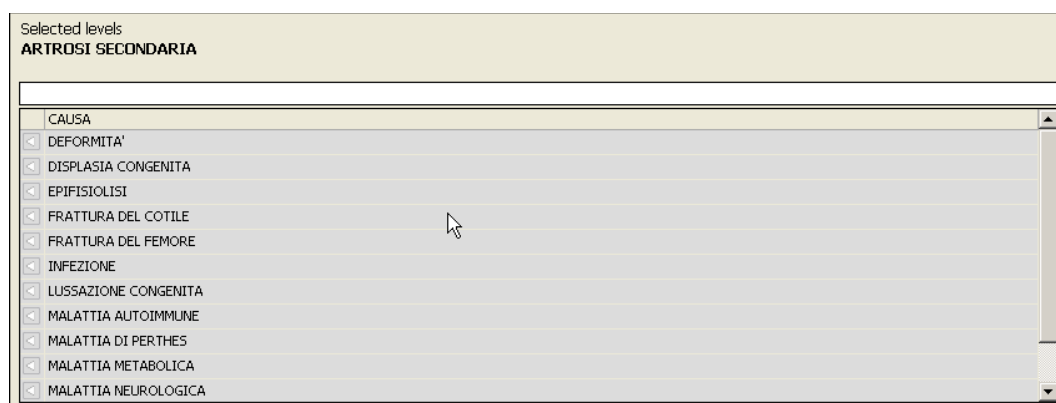
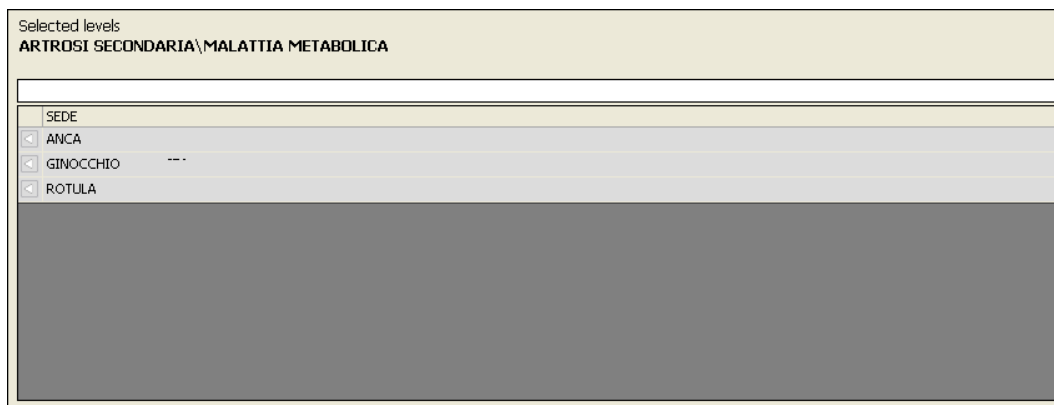


Fig 79

2. Double click the wanted cause. "Malattia metabolica" is now selected.

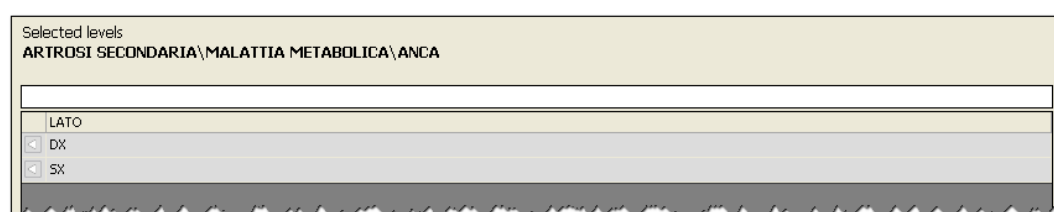
The next level is displayed, making it possible to indicate the site (Fig 80).



**Fig 80**

3. Double click the wanted site. “Anca” is now selected.

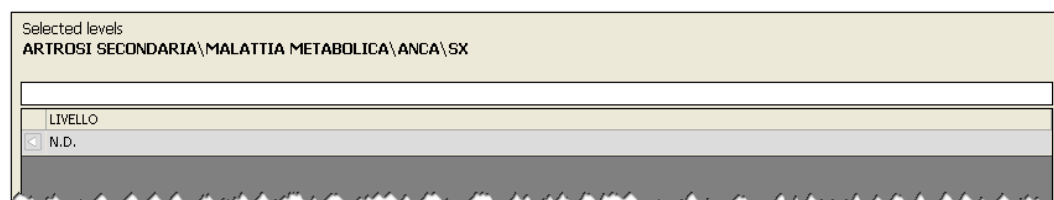
The next level is displayed, making it possible to indicate the side (Fig 81).



**Fig 81**

4. Double click the wanted side. The left side “SX” is now selected.

The next level is displayed, making it possible to indicate the level (Fig 82).



**Fig 82**

5. Double click the wanted level. In this case the only option is “non-determined” (N.D.).

#### **Information for the user.**



*“Non Determined” means that the information is not relevant for the diagnosis specification. In other words: the value of this level is not part of the definition of the diagnosis to be specified.*

The diagnosis is now displayed (Fig 83).

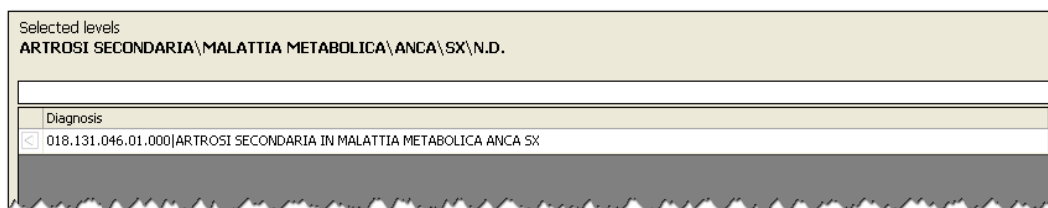


Fig 83

6. Double click the diagnosis. The diagnosis is this way inserted in the “Operation record”, in the “Operation” area (Fig 84).

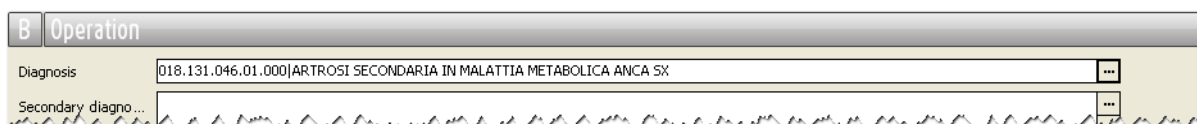



Fig 84

7. Click the **Update** button on the command bar.

The  button is available on the selection window, on each level and for each row, to make it possible to go back to the previous level (Fig 85 A). The chosen path is indicated in the “Selected levels” area (Fig 85 B).

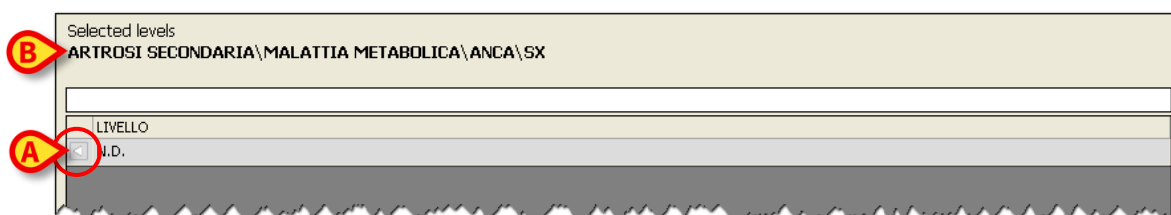



Fig 85


## 7.2.2 Secondary diagnosis

If the diagnosis selection modality is the one described in paragraph 7.2.1.4 (by DIGISTAT® selection window) another field activates, making it possible to specify the secondary diagnosis.

To specify the secondary diagnosis, after main diagnosis specification,

1. Click the **Edit** button on the command bar.
2. Click the  button placed alongside the “Secondary diagnosis” field (Fig 86 A).





**B Operation**

Diagnosis

Secondary diagno...

Main operation

Secondary operati...

Description

Notes

Not before  /  /  Suggested date  /  /

Infections

Transmissible dise...

Allergies

Proposed anesthe...

Priority  D Pre time  0 Post time  0

Approach site

My operation ☐ Estimated weight  0

Position on table



Confirmed by ☐ Surgeon ☐ Anesthesiologist ☐ Programme manager

Surgical time  0 Emergency level

Second position

**Fig 86**

The following window opens (Fig 87).

**DIAGNOSIS**

metatarsalgia Profiles  Search

Selected levels

Diagnosis

169.136.031.01.000	METATARSALGIA DI ORIGINE METABOLICA 4° METATARSO-FALANGEA SX
169.136.031.02.000	METATARSALGIA DI ORIGINE METABOLICA 4° METATARSO-FALANGEA DX
169.136.014.01.000	METATARSALGIA DI ORIGINE METABOLICA 2° METATARSO-FALANGEA SX
169.136.014.02.000	METATARSALGIA DI ORIGINE METABOLICA 2° METATARSO-FALANGEA DX
169.136.038.01.000	METATARSALGIA DI ORIGINE METABOLICA 5° METATARSO-FALANGEA SX
169.136.038.02.000	METATARSALGIA DI ORIGINE METABOLICA 5° METATARSO-FALANGEA DX
169.136.023.01.000	METATARSALGIA DI ORIGINE METABOLICA 3° METATARSO-FALANGEA SX
169.136.023.02.000	METATARSALGIA DI ORIGINE METABOLICA 3° METATARSO-FALANGEA DX
169.136.006.01.000	METATARSALGIA DI ORIGINE METABOLICA 1° METATARSO-FALANGEA SX
169.136.006.02.000	METATARSALGIA DI ORIGINE METABOLICA 1° METATARSO-FALANGEA DX
169.150.031.01.000	METATARSALGIA SECONDARIA A PATOLOGIA 4° METATARSO-FALANGEA SX

Selected diagnosis

	Description
<input checked="" type="checkbox"/>	017.000.046.01.000 ARTROSI PRIMARIA ANCA SX
<input type="checkbox"/>	018.119.046.01.000 ARTROSI SECONDARIA A INFEZIONE ANCA SX
<input checked="" type="checkbox"/>	264.083.103.01.000 OSTEOSARCOMA PAROSTALE IN ESITI INNESTO INTERCALARE CUBOIDE SX
<input type="checkbox"/>	169.136.031.02.000 METATARSALGIA DI ORIGINE METABOLICA 4° METATARSO-FALANGEA DX

OK Cancel

**Fig 87**

The procedures relating to the secondary diagnosis specification are similar to those relating to the main diagnosis specification. Therefore, see paragraph 7.2.1 for these procedures.

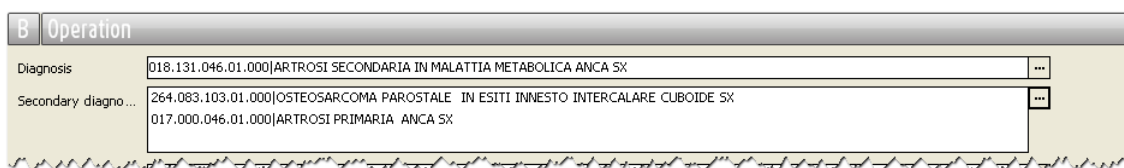
There is a difference: the secondary diagnosis can be more than one, and they can be specified all at the same time. For this reason, when one diagnosis is selected (by double-clicking the corresponding row), the diagnosis is not directly inserted in the “Operation record”, but is inserted in a list displayed below the selection window. The list is indicated in Fig 87 A.

On this list, a checkbox is placed at the beginning of each row.

To select the diagnosis that will be inserted as secondary diagnosis

1. Click the checkbox corresponding to the diagnosis to be inserted.
2. Click the **Ok** button (Fig 87 B).

All the “checked” diagnosis are this way inserted on the “Operation record” (Fig 88).



**Fig 88**

3. Click the **Update** button on the command bar.

### 7.2.3 Main Operation

The “Main operation” field makes it possible to specify the name of the operation to be performed.



*The “Main operation” field, together with the patient’s data (name, last name and patient code) and the envisaged duration of the operation, is required to change the operation state from “foreseen” to “requested”.*

To specify the main operation

- click the **Edit** button on the command bar.

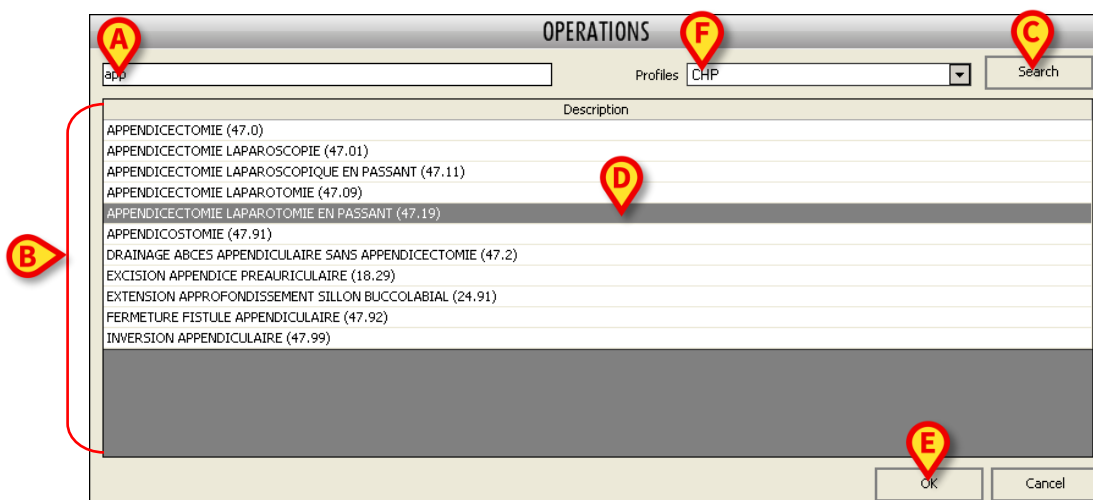
Data entry is this way enabled.

- Enter the first letters of the operation required in the “Main operation” field (Fig 71 A).

Otherwise

- click the  button next to the field (Fig 71 B).

The “Operations” window opens (Fig 89).



**Fig 89 – Operation Selection**

The “operations” window makes it possible to search for and select the operation required.

To search for the operation

- Enter the name (or part of it) of the operation in the space indicated in Fig 89 A.

From the third letter entered onwards, the system will automatically display in the middle of the window the list of all the operations with names containing the sequence of letters entered. The list appears inside the “description” area (Fig 89 B).

If only one or two letters are entered and you wish to proceed with the search, you must click the **Search** button (Fig 89 C).

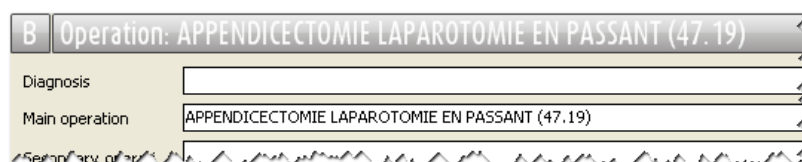
If you click the **Search** button without entering any letters, the list of all possible operations will appear.

- After finding the operation to be entered, click it.

The operation will appear as selected (Fig 89 D).

- Then click the **Ok** button (Fig 89 E).


The operation selected appears inside the “Main operation” field of the “Operation Record” page (Fig 90). This result is also obtained by double clicking the name of the operation to be entered.



**Fig 90**

If you click the **Cancel** button, the “Operations” window closes without any changes being made.

The “profiles” field (Fig 89 F) in the operation entry window makes it possible to limit the group of operations in which the search is performed.

Click the  button alongside the “profiles” field to open a menu containing different options (Fig 91). Each one usually specifies a location or an area of responsibility. Select one of these options to limit the search to the group of operations performed in that location or that area.

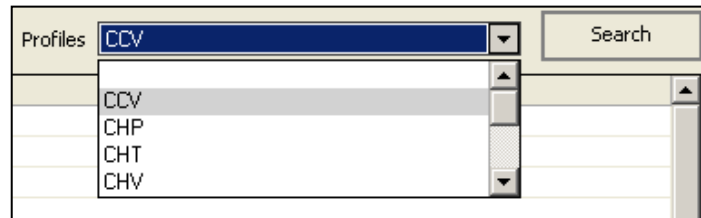


Fig 91 – Profile Selection



*The profiles are defined during configuration. You can create a specific profile for the user so that he/she can view only the operations for which he/she is responsible. For further information, contact the system administrator.*

In short, the procedure to enter an operation in the “Main operation” field of the “Operation Record” page is the following.

- Click the **Edit** button on the command bar.
- Enter the first letters of the operation required in the search field (Fig 71 A)

or

- Click the  button next to the field (Fig 71 B).

The “Operations” window opens (Fig 89).

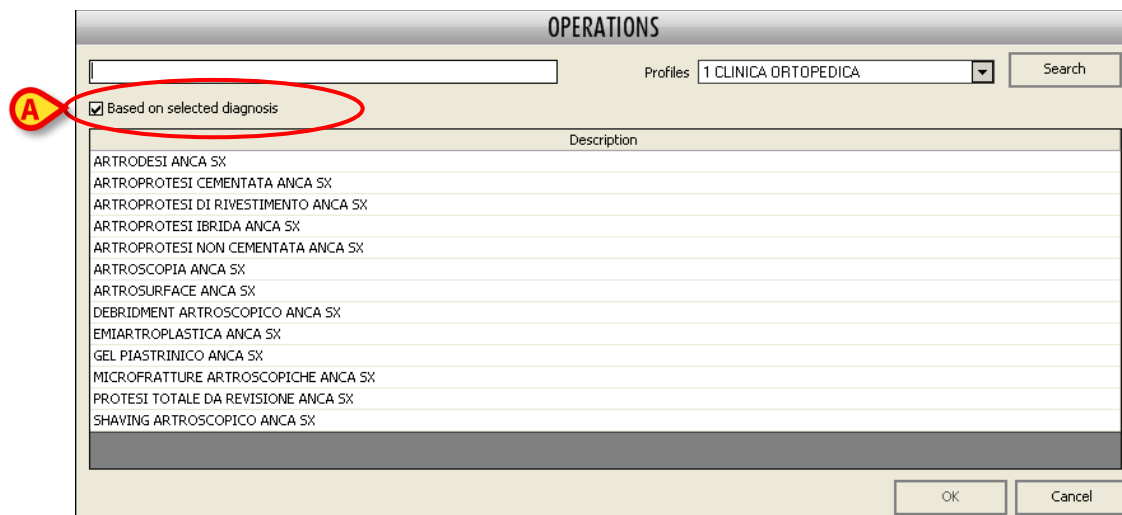
- Search for the operation required.
- Double click the name of the operation found.

The operations window disappears and the name of the operation is displayed inside the “Main operation” field (Fig 90).

- Click the **Update** button on the command bar to save the data.

### 7.2.3.1 Select an operation linked to the diagnosis

A configuration parameter makes it possible to link the operation search to the diagnosis previously selected. If enabled by configuration, a checkbox named “Based on selected diagnosis” is displayed on the operation search and selection window (Fig 92).



The screenshot shows a window titled "OPERATIONS". At the top, there is a search bar and a "Profiles" dropdown menu set to "1 CLINICA ORTOPEDICA". Below the search bar, there is a checkbox labeled "Based on selected diagnosis" which is checked. A red circle highlights this checkbox. Below the checkbox, there is a list of operations under the heading "Description". The list includes: ARTRODESI ANCA SX, ARTROPROTESI CEMENTATA ANCA SX, ARTROPROTESI DI RIVESTIMENTO ANCA SX, ARTROPROTESI IBRIDA ANCA SX, ARTROPROTESI NON CEMENTATA ANCA SX, ARTROSCOPIA ANCA SX, ARTROSURFACE ANCA SX, DEBRIDMENT ARTROSCOPICO ANCA SX, EMIARTROPLASTICA ANCA SX, GEL PIASTRINICO ANCA SX, MICROFRATTURE ARTROSCOPICHE ANCA SX, PROTESI TOTALE DA REVISIONE ANCA SX, and SHAVING ARTROSCOPICO ANCA SX. At the bottom right, there are "OK" and "Cancel" buttons.

Fig 92

When the box is checked only the operations linked to the selected diagnosis (visible in the “Diagnosis” field) are displayed on the operations search and selection window.



*This option is only available if the main diagnosis selection is performed on the DIGISTAT® search and selection window, described in paragraph 7.2.1.4. In this case the main operation selection can be performed only after diagnosis has been selected.*

## 7.2.4 Secondary operations

The “Secondary operations” field (Fig 93) specifies the list of any other operations that the patient has had or will have to have and are considered significant in relation to the current operation.

Fig 93 – “Operation” Area

The function of this field is exactly the same as that of the “Main operation” field and described in paragraph 7.2.3.

To specify the possible “Secondary operations”,

- click the **Edit** button on the command bar.

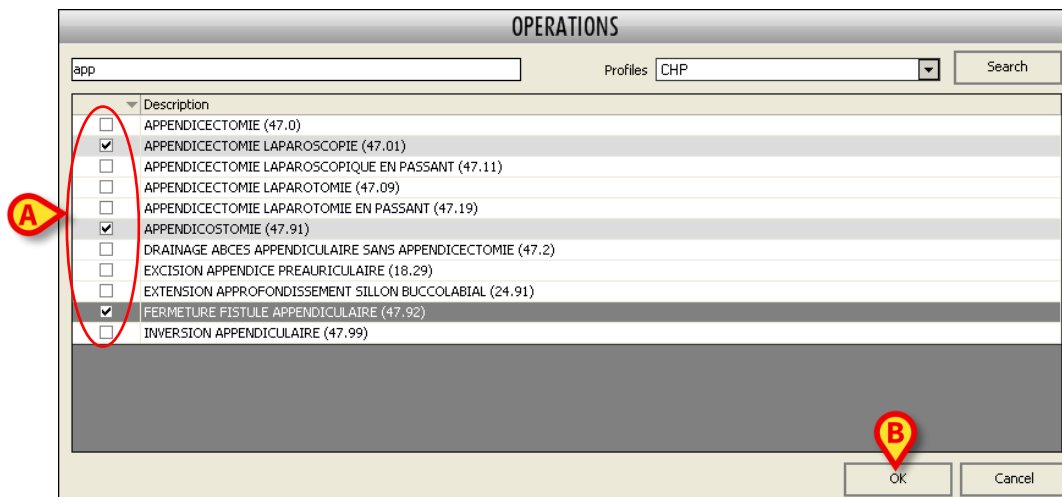
Data entry is this way enabled.

- Enter the first letters of the operation required in the “Secondary operations” field.

Otherwise

- click the button next to the field.

The “Operations” window opens (Fig 94).



**Fig 94 – Other Operations**

The window shown in Fig 94 offers the chance to select and enter more than one operation at the same time.

Then click the **Ok** button (Fig 94 **B**) to enter all the operations selected in the “Secondary operations” field of the “Operation Record” page.

## 7.2.5 Description

This field makes it possible to enter a more detailed description of the operation to be performed. It is a free field, meaning that it is not conditioned by pre-defined selections.

## 7.2.6 Notes

This field makes it possible to enter any notes relating to the operation to be performed. It is a free field, meaning that it is not conditioned by pre-defined selections.

## 7.2.7 Not before...

This field makes it possible to enter a date before which it is not possible to perform the operation. This value is binding to the value to be entered into the next field “Suggested date”. If the date 20/05/2010 is entered into the “Not before...” field, it is not possible to enter an earlier date in the “Suggested date” field”.


The value is not binding in relation to the scheduling of the operation. This means that the operation can be scheduled for a date before that specified here. In this case the system will warn the user that the scheduling contrasts with that specified previously.

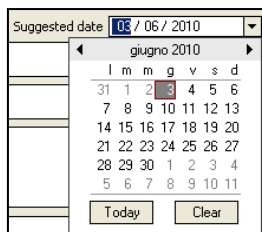
## 7.2.8 Suggested date

This field makes it possible to indicate a date as being the best for performing the operation. The suggestion need not necessarily be observed during scheduling; i.e., the date entered is not binding in relation to the scheduling of the operation. This date is, however, binding in relation to the value to be entered into the “Not before...” field. For instance, if the date 20/05/2010 is entered into the

“Suggested date” field without entering a value into the “Not before...” field, the latter field assumes the date in the “Suggested date” field (20/05/2010 in this case) as default.



Every time you have to enter a date it is possible, clicking the  arrow next to the field, to enter it using a digital calendar.



**Fig 95 – Digital calendar**

To enter the date simply click the day required. The corresponding date will automatically appear in the field. Paragraph 4.1.2 describes the digital calendar in detail.

## 7.2.9 Infections

The “Infections” field makes it possible to specify any possible infections.

**Fig 96 – “Operation” Area**

To enter an infection

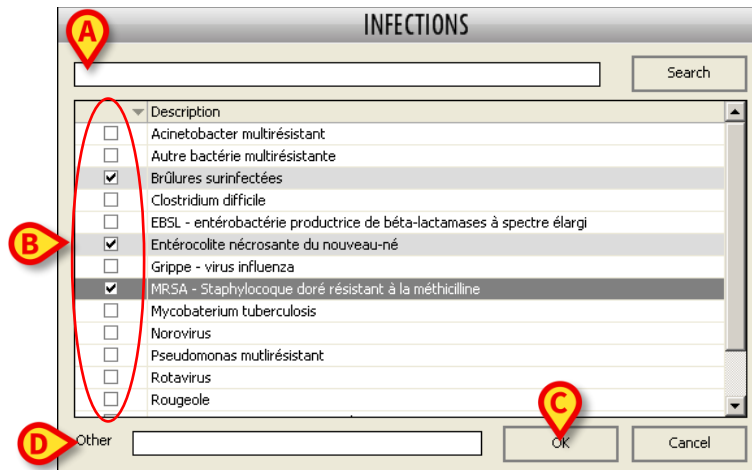
- click the **Edit** button on the command bar.
- Enter the first letters of the infection being searched for in the “infections” field.

Otherwise

- click the  button next to the field.

The “Infections” window will appear (Fig 97).





**Fig 97 – Specify Infections**

- Search, if necessary, the wanted item using the search field on the window (Fig 97 A).
- Click the checkbox corresponding to the infections that must be specified (Fig 97 B).

Multiple selection is possible.

- Click the **Ok** button (Fig 97 C) to display all the selected infections on the “Operation record” screen.

The “Infections” window offers the chance to manually enter an infection not contained in the database.

This is possible using the “other” field (Fig 97 D).

To enter an infection not contained in the database, simply write the name of the infection in the field and click **Ok**.

The name appears inside the “Infections” field of the “Operation Record” page.

When you enter an infection, the system can be configured to automatically add a certain amount of time to the estimated time required to clean the room (Fig 98). The actual duration is specified by configuration.

Operation: APPENDICECTOMIE (47.0)

Diagnosis

Main operation APPENDICECTOMIE (47.0)

Secondary operati...

Description

Notes

Not before / / Suggested date / /

Infections Norovirus;

Transmissible dise...

Allergies

Proposed anesthe...

Priority Inconnue Pre time 15 Surgical time 0 Post time 15 + 30 min

Approach site

My operation Estimated weight 0

Position on table

Confirmed by ☐ Surgeon ☐ Anesthesiologist ☐ Programme manager

Fig 98 – Infection in progress and cleaning times

## 7.2.10 Transmissible diseases

The “Transmissible diseases” field makes it possible to specify any transmissible diseases suffered by the patient.

Operation:

Diagnosis

Main operation

Secondary operati...

Description

Notes

Not before / / Suggested date / /

Infections

Transmissible dise...

Allergies

Proposed anesthe...

Priority Pre time 0 Surgical time 0 Post time 0

Approach site

My operation Estimated weight 0

Position on table

Confirmed by ☐ Surgeon ☐ Anesthesiologist ☐ Programme manager

Fig 99 – “Operation” Area

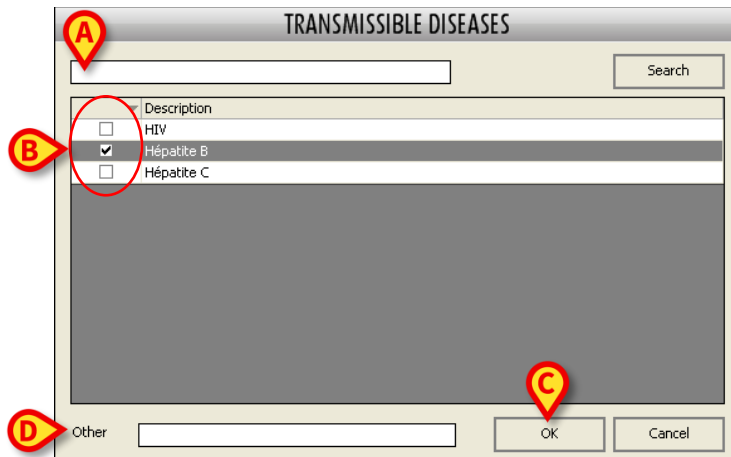
To specify a transmissible disease

- click the **Edit** button on the command bar.
- Enter the first letters of the transmissible disease being searched for in the “Transmissible diseases” field.

Otherwise

- click the  button next to the field.

The “Transmissible diseases” window appears (Fig 100).



**Fig 100 – Specify transmissible diseases**

- Search, if necessary, the wanted item using the search field on the window (Fig 100 A).
- Click the checkbox corresponding to the diseases that must be specified (Fig 100 B).

Multiple selection is possible.

- Click the **Ok** button (Fig 100 C) to display all the selected diseases on the “Operation record” screen.

The “Transmissible diseases” window offers the chance to manually enter a disease not contained in the database.

This is possible using the “other” field (Fig 100 D).

To enter a disease not contained in the database, simply write the name of the disease in the field and click **Ok**.

The name is displayed in the “Transmissible diseases” field of the “Operation Record” page.

When you enter a disease, the system can be configured to automatically add a certain amount of time to the estimated time required to clean the room (Fig 98). The actual duration is specified by configuration.

Operation: APPENDICECTOMIE (47.0)

Diagnosis

Main operation APPENDICECTOMIE (47.0) ...

Secondary operati...

Description

Notes

Not before / / Suggested date / /

Infections

Transmissible dise... Hépatite B

Allergies

Proposed aneshe...

Priority Inconnue Pre time 15 Surgical time 0 Post time 15 + 30 min

Approach site

Emergency level

My operation

Estimated weight 0

Position on table

Second position

Confirmed by ☐ Surgeon ☐ Anesthesiologist ☐ Programme manager

Fig 101 – Transmissible diseases and cleaning times

## 7.2.11 Allergies

The “Allergies” field (Fig 102 A) makes it possible to specify any allergies suffered by the patient.

Operation:

Diagnosis

Main operation

Secondary operati...

Description

Notes

Not before / / Suggested date / /

Infections

Transmissible dise...

Allergies

Proposed aneshe...

Priority Pre time 0 Surgical time 0 Post time 0

Approach site

Emergency level

My operation

Estimated weight 0

Position on table

Second position

Confirmed by ☐ Surgeon ☐ Anesthesiologist ☐ Programme manager

Fig 102 – “Operation” Area

To specify an allergy

- click the **Edit** button on the command bar.
- Enter the first letters of the allergy being searched for in the “Allergies” field.

Otherwise

- click the  button next to the field.

The “Allergies” window opens (Fig 103).

Allergies	Reaction	Notes
<input type="checkbox"/> Médicaments		
<input type="checkbox"/> Antibiotiques		
<input type="checkbox"/> Pénicillines		
<input checked="" type="checkbox"/> Hypnotiques		
<input type="checkbox"/> Curares		
<input type="checkbox"/> Morphiniques		
<input checked="" type="checkbox"/> Anesthésiques locaux		
<input type="checkbox"/> Protamine		
<input type="checkbox"/> Héparine		
<input type="checkbox"/> Colloïdes		
<input type="checkbox"/> Produit de contraste radiologique		
<input type="checkbox"/> Contact		
<input type="checkbox"/> Latex		
<input type="checkbox"/> Désinfectants iodés		
<input type="checkbox"/> Chlorexidine		
<input type="checkbox"/> Terrain atopique		
<input type="checkbox"/> Alimentaire (kaki, banane, figue, noi...)		
<input type="checkbox"/> Pollens		
<input type="checkbox"/> Animaux		
<input type="checkbox"/> Hyménoptères		
<input type="checkbox"/> Accariens		
<input type="checkbox"/> Autre...		

**Fig 103 – Specify Allergies**

To specify an allergy,


- click the box alongside the name of the allergy selected (Fig 103 A).

Multiple selection is possible. All the selected items are inserted in the “Operation record” screen.

Click the “Reaction” column on the row corresponding to the selected allergy to specify the kind of allergic reaction (if so configured, the kind of allergic reaction can be selected on a list of pre-defined options - Fig 103 B).

Click the “note” column for the allergy selected to enter any notes concerning the allergy selected (Fig 103 C).

- Click the **Ok** button (Fig 103 D) to enter all the allergies selected in the “Allergies” field of the “Operation Record” page.

The icon , which may appear alongside the field, highlights the presence of notes relating to the allergies entered (Fig 104).

**Fig 104 – Allergy Notes**

## 7.2.12 Proposed Anesthesia

The “Proposed Anesthesia” field (Fig 105 A) makes it possible to specify the type of anesthesia proposed for the operation.

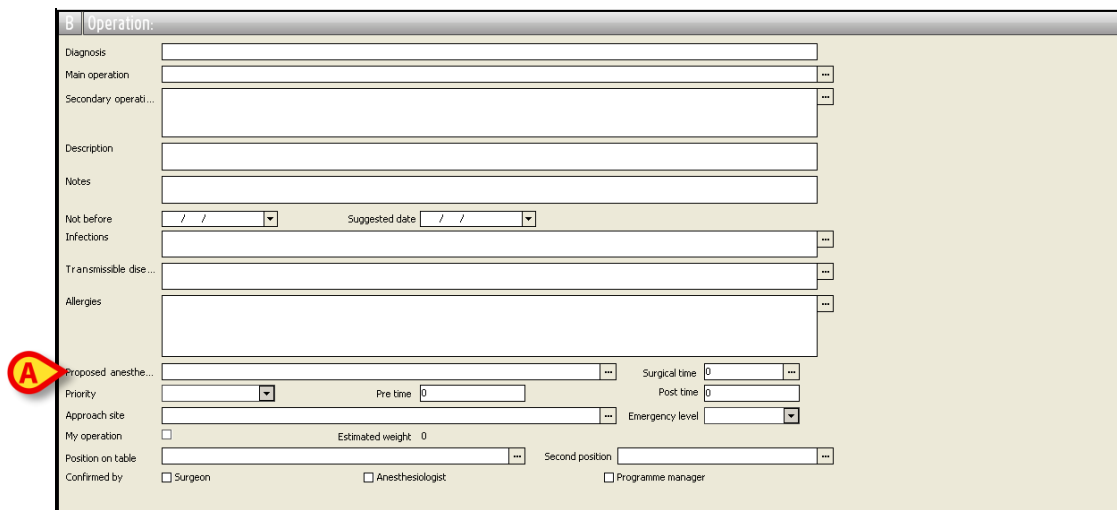
The image shows a software window titled "Operation:". It contains several input fields and checkboxes. A red circle with the letter 'A' is placed over the "Proposed anes..." field, which is a text input box. Other fields include "Diagnosis", "Main operation", "Secondary operati...", "Description", "Notes", "Not before" (with a date picker), "Suggested date" (with a date picker), "Infections", "Transmissible dise...", "Allergies", "Priority", "Pre time", "Surgical time", "Post time", "Approach site", "Emergency level", "My operation", "Estimated weight", "Position on table", "Second position", and "Confirmed by" with checkboxes for "Surgeon", "Anesthesiologist", and "Programme manager".

Fig 105 – “Operation” Area

To specify a type of anesthesia

- click the **Edit** button on the command bar.
- Enter the first letters of the anesthesia being searched for in the “Proposed anesthesia” field.

Otherwise

- click the  button placed next to the field.

The “Anesthesia” window opens (Fig 106).

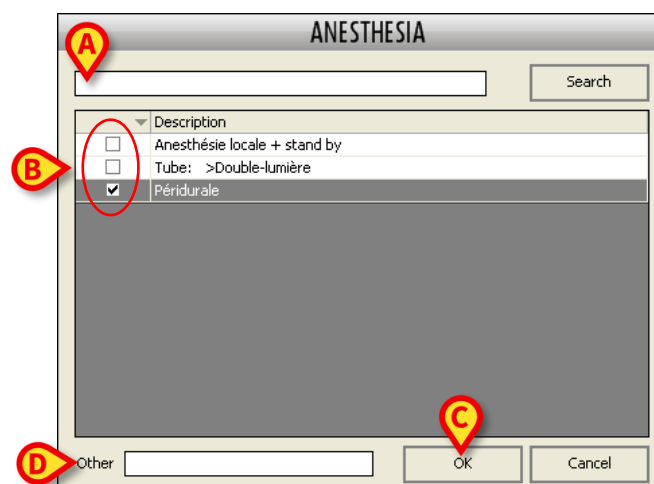
The image shows a software window titled "ANESTHESIA". It has a search bar at the top with a "Search" button. Below the search bar is a list box with a "Description" header. The list contains three items: "Anesthésie locale + stand by", "Tube: >Double-lumière", and "Péridurale". The "Péridurale" item is selected, indicated by a checkmark in a box. At the bottom of the window, there is an "Other" text input field, an "OK" button, and a "Cancel" button. Red circles with letters 'A', 'B', 'C', and 'D' are placed over the search bar, the list box, the "OK" button, and the "Other" field respectively.

Fig 106 – Specify Anesthesia

- Search, if necessary, the wanted item using the search field on the window (Fig 106 A).

- Click the checkbox corresponding to the anesthesia that must be specified (Fig 106 B).

Multiple selection is possible.

- Click the **Ok** button (Fig 106 C) to display all the selected anesthetics on the “Operation record” screen.

The “Anesthesia” window offers the chance to manually enter an anesthesia not contained in the database.

This is possible using the “Other” field (Fig 106 D).

To enter an anesthesia not contained in the database, simply write the name of the anesthesia in the field and click **Ok**.

The name appears inside the “Proposed anesthesia” field of the “Operation Record” page.

## 7.2.13 Surgical time

The “Surgical time” field (Fig 107 A) makes it possible to specify the envisaged duration of the operation.



*The “Surgical time” field, together with the patient’s main data (name, last name and patient code) and the type of operation envisaged, is required to change the operation state from “foreseen” to “requested”.*

The screenshot shows a form titled "B | Operation:". It includes fields for "Diagnosis", "Main operation", "Secondary operation", "Description", "Notes", "Not before", "Suggested date", "Infections", "Transmissible disease", "Allergies", "Proposed anesthesia", "Priority", "Pre time", "Surgical time", "Post time", "Approach site", "Emergency level", "My operation", "Estimated weight", "Position on table", "Second position", and "Confirmed by" with checkboxes for "Surgeon", "Anesthesiologist", and "Programme manager". A red circular icon with a white 'A' is positioned over the "Surgical time" field.

**Fig 107 – “Operation” area**

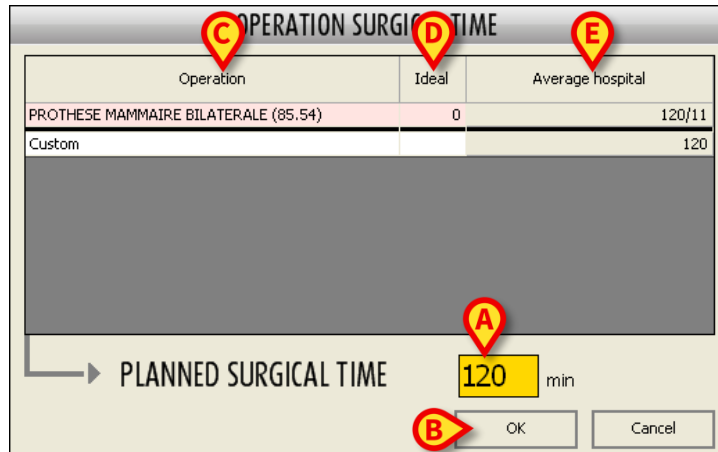
To specify the surgical time:

- click the **Edit** button on the command bar.
- Insert the duration (in minutes) in the “Surgical time” field.

Otherwise

- click the  button placed near the field.

In both cases the “Surgical time” window appears (Fig 108).



Operation	Ideal	Average hospital
PROTHESE MAMMAIRE BILATERALE (85,54)	0	120/11
Custom		120

PLANNED SURGICAL TIME

120 min

OK Cancel

**Fig 108 – Expected surgical time specification**

- Insert the value (in minutes) in the field indicated in Fig 108 A.
- Click the **Ok** button (Fig 108 B).

The specified duration appears in the “Surgical time” field on the “Operation record” screen.

The central part of the window can display, if specified by configuration, three different kinds of information.

The “Operation” column (Fig 108 C) displays the envisaged operation name.

The “Ideal” column (Fig 108 D) displays the optimal duration for that kind of operation.

The “Average hospital” column (Fig 108 E) displays the average duration for that kind of operation in the form “*average/number of operations on which the average is calculated*”. For example: “45/8” means that hospital average duration is 45 minutes calculated on 8 operations of the same kind.

If there are secondary operations specified the average duration of each of them is displayed separately.

The “Ideal” and “Average” values can be double-clicked to be inserted as surgical time on the “Operation record”.





*The expected duration of the operation influences the operation scheduling possibilities. Every operation can be scheduled in relation to the expected duration. On the “Operation Scheduling” pages, analyzed in detail in paragraph 8, the operations are displayed as boxes (Fig 175) and the length of the boxes is proportional to the duration of the operation.*

## 7.2.14 Priority

---

The “priority” field makes it possible to specify the level of priority assigned to the operation. The levels of priority are established during configuration according to the user’s requirements. The example shown allows for 4 possibilities (Fig 109):

- 1) Unknown priority;
- 2) Normal priority;
- 3) High priority;
- 4) Very high priority.



**Fig 109 - Priority**



*The fields “priority” and “emergency level” are mutually exclusive, i.e. when the “priority” is specified the “emergency level” field is disabled and vice versa.*

## 7.2.15 Pre - time

---

The “Pre time” field (“pre surgical time”) makes it possible to specify the estimated time required to prepare the room for the operation. To enter this value, simply type it into the field. The time entered is added to the operation duration when it is scheduled. It will be displayed on the “Schedule Operation” screen (paragraph 8) as a gray portion (see Fig 178). In the configuration here described the default pre surgical time is 15 minutes.

## 7.2.16 Post - time

---

The “Post time” field (“post surgical time”) makes it possible to specify the estimated time required to make the room ready again after the operation. In the configuration shown in the example, the system assigns a default post surgical time of 15 minutes. To enter a different value, simply type it into the field. The time entered is added to the operation duration when it is scheduled. It will be displayed on the “Schedule Operation” screen (paragraph 8) as a grey portion (see Fig 178).

## 7.2.17 Approach site

The “Approach site” field makes it possible to specify the approach mode to the patient.

Fig 110 – “Operation” area

To specify an approach mode

- click the **Edit** button on the command bar.
- Enter the first letters of the kind of approach being searched for in the “Approach site” field.

Otherwise

- click the [...] button placed next to the field.

The “Approach site” window appears (Fig 111).

Fig 111 – Approach site

- Search, if necessary, the wanted item using the search field on the window (Fig 111 A).
- Click the checkbox corresponding to the approach that must be specified (Fig 111 B).

Multiple selection is possible.

- Click the **Ok** button (Fig 111 C) to display all the selected approaches on the “Operation record” screen.

The “Approach site” window offers the chance to manually enter an approach mode not contained in the database. This is possible using the “Other” field (Fig 111 D).

To enter an approach mode not contained in the database, write the name of the approach mode in the field and click **Ok**.

The name appears inside the “Approach site” field of the “Operation Record” page.

## 7.2.18 Emergency level

---

The “Emergency level” field (Fig 113 A) makes it possible to specify the urgency of an operation.

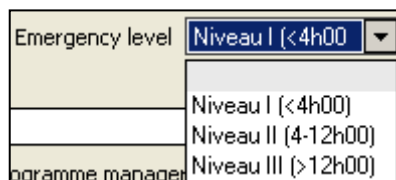


Fig 112

When an emergency level is assigned (any level in the configuration here described) it is possible to directly schedule the operation as a day reserve; i.e. the “Plan as reserve” option in the **Change** menu of the control bar is activated (Fig 113 B). See paragraph 8.5.5 for an explanation of the meaning of “reserve” in the Smart Scheduler system.

Fig 113

To plan the operation as reserve

- Click the **Change** button on the command bar (Fig 113 B).

The menu shown in Fig 113 will open

- click the “Plan as reserve” option (Fig 113 C).

The window shown in Fig 114 will open.

Fig 114

- Specify the operating block and the operation date in the appropriate fields (Fig 114 A).
- Click Ok.

The operation will be scheduled as reserve for the specified date and block. The operation state will change to “Scheduled”

When an operation is indicated as “Emergency” (any level), the corresponding rectangle in the graphic representation of the “Schedule” module is bordered in red (Fig 115). See paragraph 8 for the scheduling procedure.



Fig 115



*The fields “priority” and “emergency level” are mutually exclusive, i.e. when the “priority” is specified the “emergency level” field is disabled and vice versa.*

### 7.2.19 My operation

---

The “My operation” checkbox makes it possible to enter the operation in the user’s personal list of operations. A user having the required permissions level (this option is usually granted to surgeons) can check this box to limit the visibility of the operation. The operation this way checked is (and will be) only visible to the user who is creating or editing it.

This option is only available if the operation is in “Foreseen” state. In the moment it turns to “Requested” state, the operation becomes visible to all users.

This option is linked to the “My operations” field of the “Operation list” page (see paragraph 4.1.1). When performing a search, select this field to display the list of operations that are only visible to the user currently logged, i.e. the list of operations for which the “My operation” checkbox was selected.

### 7.2.20 Estimated weight

---

The “Estimated weight” field shows the patient’s weight. This field cannot be directly edited. The “estimated weight” value is entered in the “patient” area of the page. See paragraph 7.1

### 7.2.21 Position on the operating table

---

The “Position on table” field makes it possible to specify the patient’s position on the operating table.


The screenshot shows a form titled "Operation:". It contains several input fields and dropdown menus. Callout A points to the "Confirmed by" field, which has a dropdown menu. Callout B points to the "Priority level" dropdown menu. Other fields include "Diagnosis", "Main operation", "Secondary operation...", "Description", "Notes", "Not before" (date), "Suggested date" (date), "Infections", "Transmissible disease...", "Allergies", "Proposed anesthesia", "Pre time", "Surgical time", "Post time", "Approach site", "My operation", "Estimated weight", "Second position", and "Confirmed by" (checkboxes for Surgeon, Anesthesiologist, Programme manager).

**Fig 116 – “Operation” area**

To specify a position

- click the **Edit** button on the command bar.
- Enter the first letters of the position being searched for in the “Position on table” field.

Otherwise

- click the  button placed next to the field.

In both cases the “Position on table” window appears (Fig 117).

The screenshot shows a window titled "POSITION ON TABLE". It has a search field at the top right. Below it is a list of positions with checkboxes: DD, DV, DLD, DLG, Gynécologique, Genu-pect, and Jambes écartées. Callout A points to the search field. Callout B points to the checkbox for "DLG". Callout C points to the "OK" button. Callout D points to the "Other" field at the bottom left. There is also a "Cancel" button at the bottom right.

**Fig 117 – Position on Table**

- Search, if necessary, the wanted item using the search field on the window (Fig 117 A).
- Click the checkbox corresponding to the position that must be specified (Fig 117 B).

Multiple selection is possible.

- Click the **Ok** button (Fig 117 C) to display all the selected positions on the “Operation record” screen.

The “Position on table” window offers the chance to manually enter a position not contained in the database.

This is possible using the “Other” field (Fig 117 D).

To enter an a position not contained in the database, simply write the name of the position in the field and click **Ok**.

The name appears inside the “Position on table” field of the “Operation Record” page.

### 7.2.22 Second position

---

Use the “Second position” field to specify a possible second position for the patient during the operation. The “Second position” specification procedure is identical to that described in paragraph 7.2.21 for the “Position on table” specification.

### 7.2.23 Confirmed by...

---

This field makes it possible to specify whether or not confirmation to proceed with the operation has been given by the

- 1) Surgeon
- 2) Anesthesiologist
- 3) Program Manager

To specify that confirmation has been given, select the checkbox corresponding to the person who has given confirmation.

### 7.2.24 Operation schedule summary

---

After the operation has been scheduled, the “operation” area shows, at the bottom, the date, time, room and block established (Fig 118).



The screenshot shows a software window titled "Operation schedule summary". It contains several fields: "Position on table" with the value "DLG;", "Confirmed by" with two checkboxes, "Surgeon" and "Anesthesiologist", both of which are unchecked. Below these, it displays "Date: 26-feb", "Hour: 07.05", "Operating Block: BH05", and "Room: 10". At the bottom, there is a partially visible section labeled "Requirements" with a jagged, mountain-like border.

**Fig 118**

## 7.3 The “Requirements” area

The “Requirements” area makes it possible to specify and manage the patient’s requirements necessary to the performance of the operation (Fig 119).

A “requirement” is any document necessary to the progress of the operation procedure (e.g.: the result of a medical examination or patient consent form).

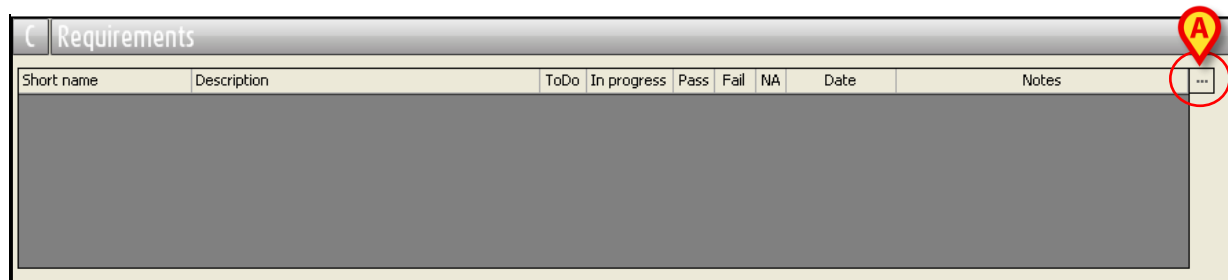



Fig 119 – “Requirements” Area

To enter a new requirement

- Click the **Edit** button on the command bar of the “Operation Record” page.
- Click the  button alongside the “Requirements” table (Fig 119 A).

The following window opens.

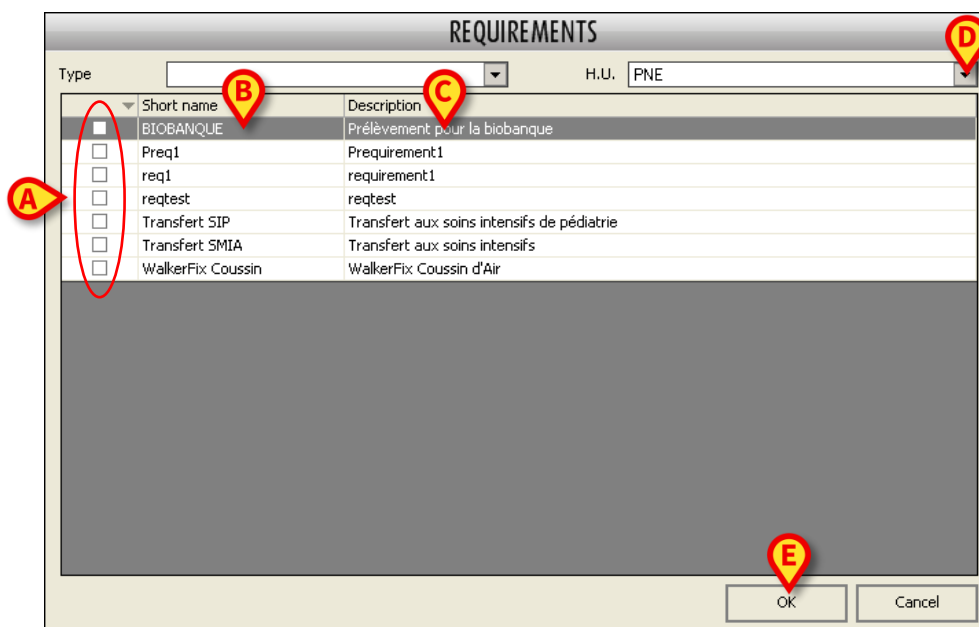



Fig 120 – Enter Requirement

The central part of the window contains the list of possible requirements. The area is split into three columns. The first contains the selection boxes (Fig 120 A). Click a box to select the corresponding requirement; you can select more than one requirement at a time. The second column contains the



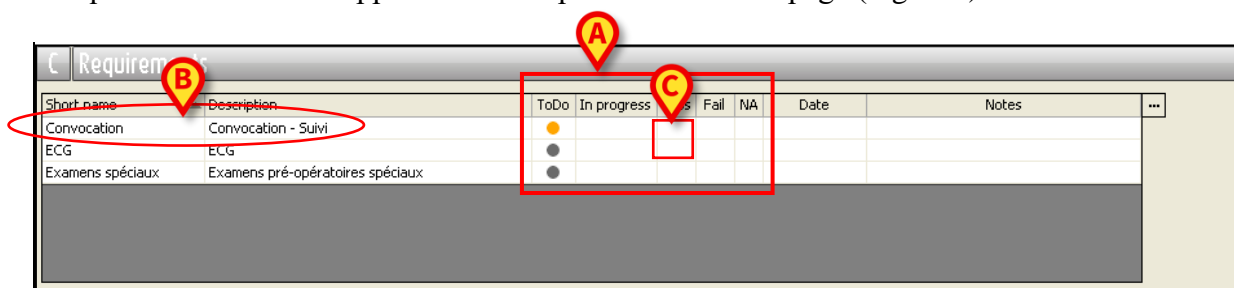
abbreviated name of the requirement (Fig 120 **B**). The third column contains a more detailed description of the requirement in question (Fig 120 **C**).




Click the  button alongside the “type” field to open a menu which makes it possible to indicate the type of requirement being searched for. A “Hospital Unit” filter is also available (Fig 120 **D**). The requirements list displayed is linked to the hospital unit, i.e. the number and kind of requirements displayed depend on the hospital unit selected.

To enter the requirements desired

- Select the corresponding box (Fig 120 **A**).
- Click the **Ok** button (Fig 120 **E**).

The requirements selected appear on the “Operation Record” page (Fig 121).



Short name	Description	ToDo	In progress	Done	Fail	NA	Date	Notes	...
Convocation	Convocation - Suivi								
ECG	ECG								
Examens spéciaux	Examens pré-opératoires spéciaux								


**Fig 121 – Requirements Table**


The “Requirements” table (Fig 121) makes it possible to display various kinds of information concerning the state of the acquisition process of every requirement.

The first two columns of the table contain the abbreviated name and the description of the requirement.

The columns indicated in Fig 121 **A** show the position of the requirement in the acquisition process.

The way the icon looks (shape and colour) provides additional information.


The  icon indicates that the requirement should have been obtained in one of the previous states.

The  icon indicates that the requirement should have been obtained in the state preceding current state.

The  icon indicates that the requirement must be obtained in the current state.

The  icon indicates that the requirement will have to be obtained in a subsequent state.

The  indicates that the requirement has been properly obtained.




The  icon indicates that the process for obtaining the requirement has failed (e.g., a test has resulted negative or a patient consent form has not been signed).




The  icon indicates that no information is available for the particular requirement concerned.




*Remember that the term “state” indicates the state of the operation (see paragraph 2.2 for a description of possible states). So, for example, if the operation has “scheduled” state, the “previous state” is the “requested” state, while if the operation has “requested” state, the previous state is the “foreseen” state.*


Every icon is in a specific column of the “Requirements” table

The “To Do” column will contain the ,  or  icons, depending on whether or not the requirement has to be obtained in the current state, should have been obtained in a previous state or must be obtained in a subsequent state.

The “In Progress” column will contain the ,  or  depending on whether or not the requirement has to be obtained in the current state, should have been obtained in a previous state or must be obtained in a subsequent state.

The “Requirement Pass” column will contain the  icon if the requirement has been properly obtained.

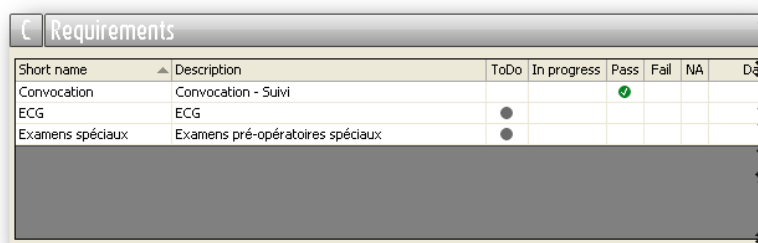
The “Requirement Fail” column will contain the  if the process the obtain the requirement has failed.




The “N/A” column will contain the  icon if no data is available for the requirement indicated.

To indicate a change in a requirement acquisition process (e.g., to indicate the acquisition of the requirement in question), simply click the corresponding box.

If, for example, you wish to indicate that the “Convocation” requirement (Fig 121 **B**) has been obtained, simply click the box indicated in Fig 121 **C**.

The table will change as shown below.



Short name	Description	To Do	In progress	Pass	Fail	NA	Date
Convocation	Convocation - Suivi						
ECG	ECG						
Examens spéciaux	Examens pré-opératoires spéciaux						

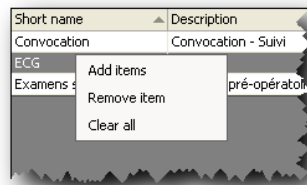
**Fig 122 – Requirement Obtained**

The “Date” column makes it possible to indicate the date on which a requirement was obtained or the date on which the acquisition process failed.

The “Notes” column makes it possible to enter any notes on the requirement in question.

To enter a note or a date, simply click the corresponding box.

You can add or remove a requirement from the list by right clicking. Right click the “requirements” area to open the menu shown in Fig 123.



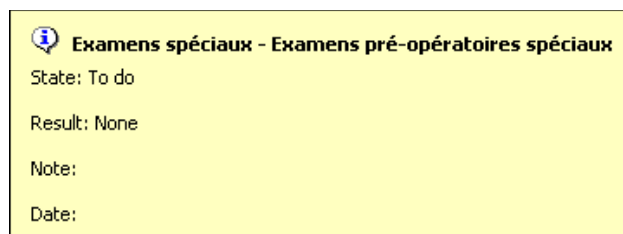
**Fig 123**

Click “Add items” to open the window shown in Fig 120 and add new requirements.

Click “Remove item” to remove an item selected from the list of requirements

Click “Clear all” to clear all items from the list of requirements.

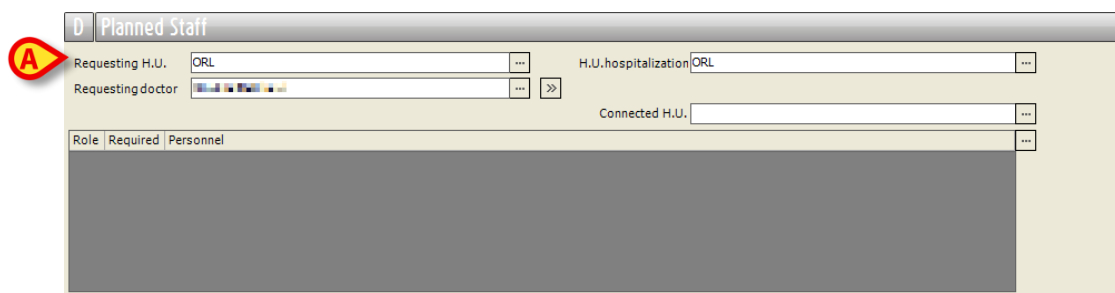
To display a window providing information on one of the requirements on the list, pass the mouse pointer on the item (Fig 124).



**Fig 124 – Requirement information**

## 7.4 The “Planned staff” area

The “Planned Staff” area” (Fig 125) makes it possible to indicate the staff required for the operation, stating both their “roles” (surgeon, anesthesiologist etc.) and their identities (specific names and last names).



**Fig 125 – Planned Staff**

To select the staff, if not already specified by default, you must first specify the hospital unit requesting the operation (default values are set by configuration).

To specify the requesting hospital unit

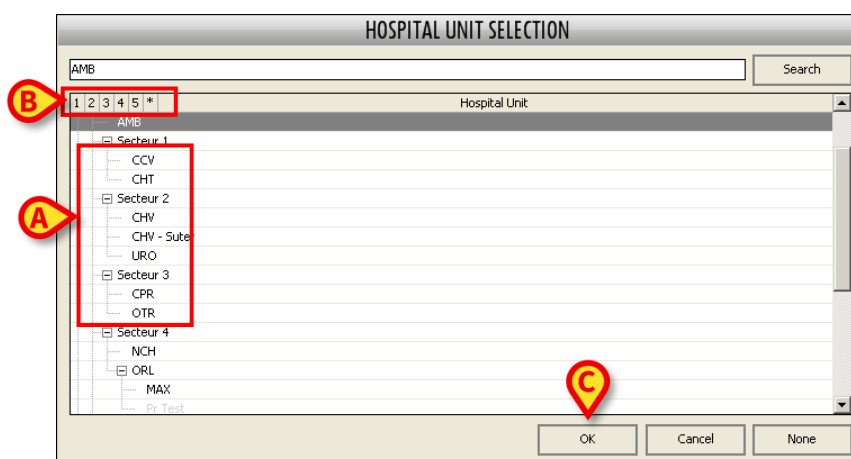
- Click the **Edit** button on the command bar of the “Operation Record” page.

- Enter the first letters of the name of the requesting unit in the “Requesting H.U.” field (Fig 125 A).

Or

- click the  button alongside the “Requesting H.U.” field.

The following window opens (Fig 126).



**Fig 126 – Hospital unit selection**

The central part of the window reflects the organization of the hospital structure where you are operating. This means that the various locations, blocks or areas of the hospital are specified. These are shown as a tree structure which highlights their inclusion relationships. The area shown in Fig 126 A indicates that Sector 2 includes the two locations called CHV and URO and that Sector 3 includes the locations called CPR and OTR; both sectors are included in a structure called AMB.

To indicate the position occupied by an item on the list in the tree structure, we say that the specific item is at a specific level. In the figure, for example, level 1 indicates the whole hospital, level 2 indicates the sub-units of the hospital, level 3 indicates the sub-units of these sub-units, and so on. The sectors in the figure shown are at level 4, and the locations included in them are at level 5.

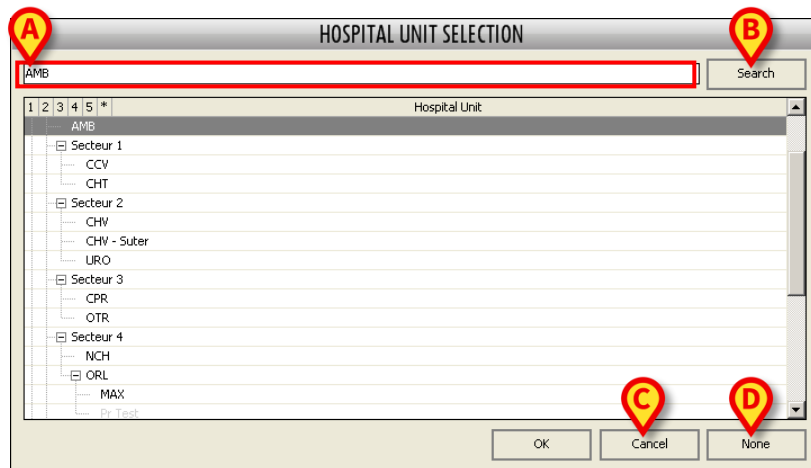
The buttons in the top left corner (Fig 126 B) make it possible to display only items of the level specified by the button (and those of lower levels).

To select one of the items on the page, simply double click it, or click it and then press the **Ok** button (Fig 126 C).



*Every user, depending on the permissions held, will be permitted to select only the locations for which he/she is responsible. The permissions of every user are specified during configuration by the system administrator.*

The “hospital unit selection” window makes it possible to search for the item required. To do so, simply enter the first letters of the name of the item being searched for in the search field (Fig 127 A) then click the **Search** button (Fig 127 B).



**Fig 127 – Hospital unit selection**

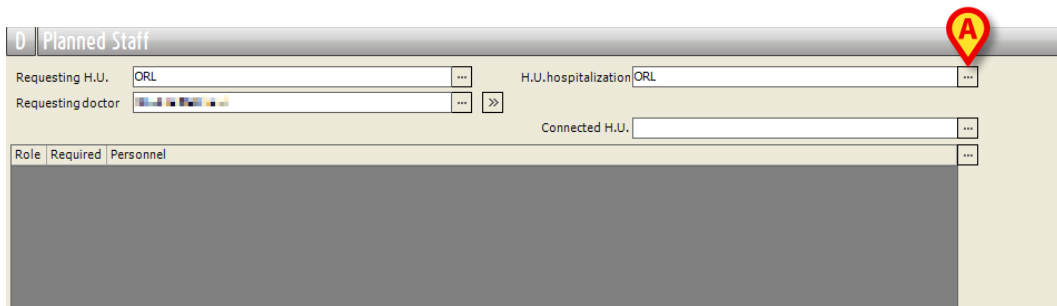
The **Cancel** button (Fig 127 C) makes it possible to close the window without making any changes.

The **None** button (Fig 127 D) makes it possible to “clean the field”, i.e., to eliminate any previously selected items.

The “Requesting Hospital Unit” field is a mandatory field. This information cannot be omitted.

### 7.4.1 Selecting the hospitalization unit

The field shown in Fig 128 A makes it possible to specify the location where the patient will be hospitalized.




**Fig 128**

To specify the hospitalization unit

- Click the **Edit** button on the command bar of the “Operation Record” page.
- Enter the first letters of the name of the hospital unit required in the “H.U. Hospitalization” field.

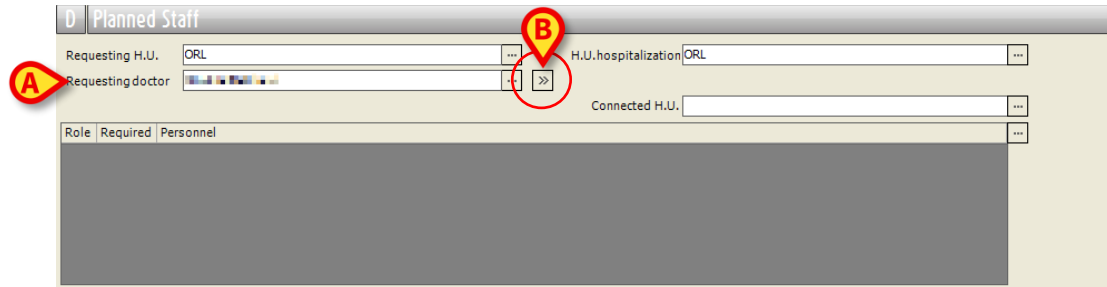
Or

- click the  button alongside the “Hospitalization H.U.” field.

The window shown in Fig 126 and Fig 127 opens. See the previous paragraph for the selection procedure.

## 7.4.2 Selecting the requesting doctor

The field shown in Fig 129 **A** makes it possible to specify the name of the doctor requesting the operation.



The screenshot shows a window titled 'Planned Staff'. It contains several input fields: 'Requesting H.U.' with the value 'ORL', 'Requesting doctor' with a dropdown arrow (A), 'H.U.hospitalization' with the value 'ORL', and 'Connected H.U.' with a dropdown arrow. Below these fields is a table with columns 'Role', 'Required', and 'Personnel'. The 'Requesting doctor' field is highlighted with a red circle and a yellow pin labeled 'A'. A red circle with a yellow pin labeled 'B' is placed over the search button (a magnifying glass icon) next to the 'Requesting doctor' field.

Fig 129

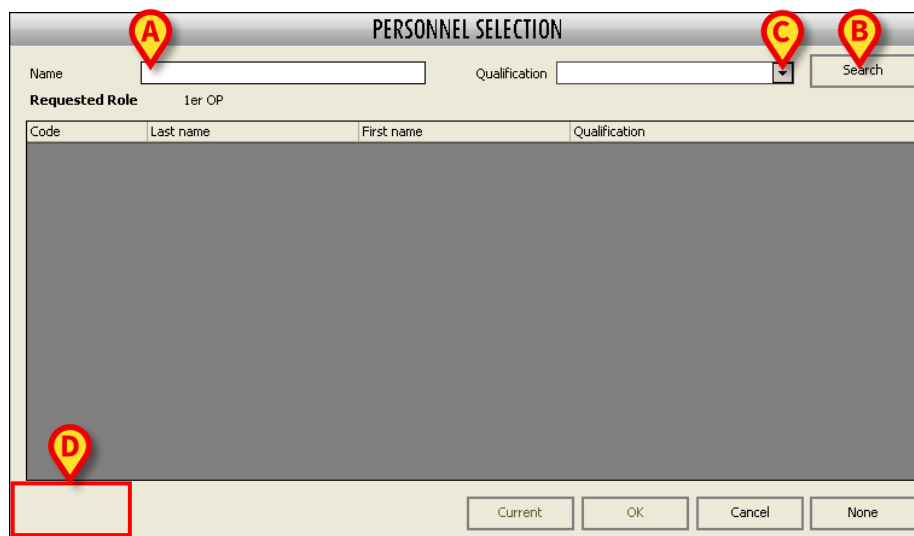
To specify the requesting doctor

- Click the **Edit** button on the command bar of the “Operation Record” page.
- Enter the first letters of the name of the person required in the “Requesting doctor” field.

Or

- click the  button alongside the “Requesting doctor” field.

The following window opens (Fig 130).



The screenshot shows a window titled 'PERSONNEL SELECTION'. It has a search interface with a 'Name' field (A), a 'Qualification' dropdown (C), and a 'Search' button (B). Below the search fields is a table with columns 'Code', 'Last name', 'First name', and 'Qualification'. The table is currently empty. At the bottom of the window, there is a red box (D) and four buttons: 'Current', 'OK', 'Cancel', and 'None'.

Fig 130 – Select the requesting surgeon

To search for the name, enter the name (or part of it) of the person being searched for in the “Name” field (Fig 130 **A**) then click the **Search** button (Fig 130 **B**).

Click the **Search** button without entering any letter to obtain the list of all those with permission to perform that function.

You can limit the search exclusively to people who occupy a specific role. To do so, use the “Qualification” field. Click the arrow indicated in Fig 130 C to open a menu containing the possible options (Fig 131 A). Select one of these options to display only the names of the people with the qualification specified.

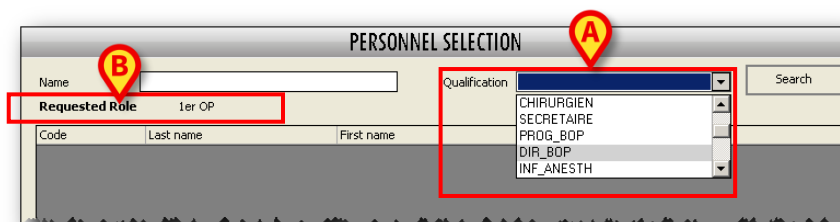


Fig 131 – Selection by Qualification

The “requested role” area (Fig 131 B) indicates the qualification necessary for selection as doctor requesting the operation. In the example shown, only those with the qualification of first operator can request an operation. This specification is made during configuration and cannot be changed by the users.

Once the role requested has been selected, it is possible to select a name only from those who possess the specified qualification.

If the system is so configured, the name of the user connected can appear in the area indicated in Fig 130 D. If the user connected has the qualification necessary to cover the role of requesting doctor, he/she can simply click the **Current** button to enter his/her name in the “Requesting Doctor” field.

The **Cancel** button makes it possible to close the window without making any changes.

The **None** button makes it possible to “clean the field”, i.e. to eliminate any previously selected items.

The **>>** button in Fig 129 B and Fig 132 A makes it possible to assign the name of the requesting doctor also to the role of “First Operator” of the operating room staff (Fig 132 B).

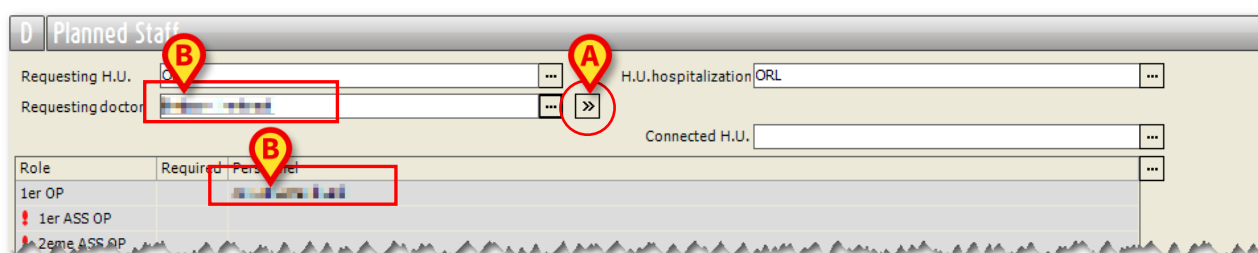


Fig 132

### 7.4.3 Connected H.U.

The “Connected H.U.” field makes it possible to make the operation visible also to users belonging to other hospital units (Fig 133 A). Edit functionalities will be available accordingly to the user permissions.

The screenshot shows a window titled 'Planned Staff'. It contains several input fields: 'Requesting H.U.' with the value 'ORL', 'Requesting doctor' with a list of names, 'H.U. hospitalization' with the value 'ORL', and 'Connected H.U.' which is currently empty. A red circle with a yellow 'A' is placed over the 'Connected H.U.' field. Below these fields is a table with columns 'Role', 'Required', and 'Personnel'. The table is currently empty.

**Fig 133**

To specify the connected hospital units use the procedure described in the previous chapter (7.4.1)

### 7.4.4 Cost center selection

Some configurations require the specification of the cost center to which the operation must be associated. When the cost center specification is required it is performed through an additional field placed under the “Requesting doctor” field.

To specify a cost center,

- click the **Edit** button on the command bar of the “Operation Record” page.
- Enter the first letters of the name of the cost center required in the “Cost Center” field,

or

- click the  button alongside the “Cost Center” field.

A window enabling the cost center search and selection will open.

### 7.4.5 The “Planned Staff” table

The “Planned Staff” table makes it possible to specify ad/or request the staff to perform the operation (Fig 134 A).

The screenshot shows the 'Planned Staff' window. The 'Requesting H.U.' field is 'AMB' and 'H.U. hospitalization' is 'AMB'. The 'Requesting doctor' field is empty. Below these fields is a table with columns 'Role', 'Required', and 'Personnel'. The table contains two rows: '1er OP' and 'MDALG RESP', both with a red exclamation mark in the 'Required' column. A red circle with a yellow 'A' is placed over the table. To the right of the table is a 'Referent' field. A red circle with a yellow 'B' is placed over the 'Referent' field.

**Fig 134 – Room staff selection**


Before making any selection, the area contains the list of roles indispensable to the operation. In Fig 134 there are two roles indicated as indispensable (the first operator and the “Mdalg Resp”, i.e. the anaesthetist).



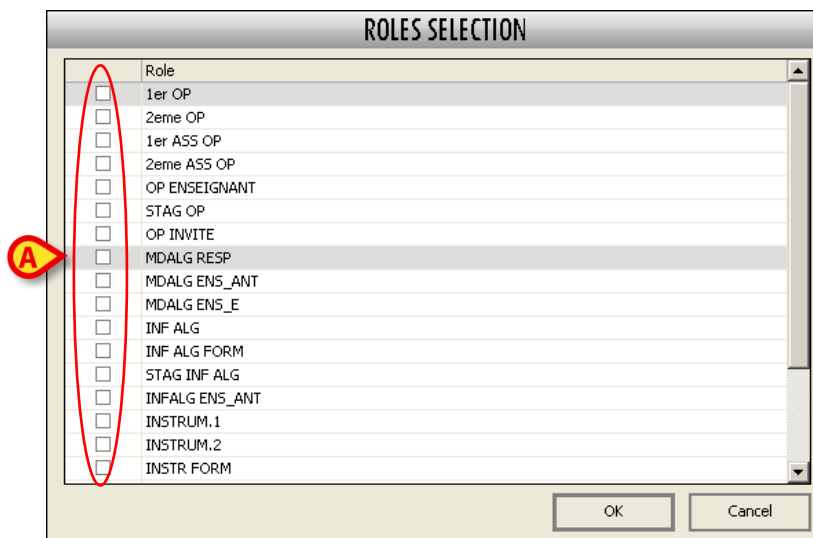


*By configuration, for every type of operation, you can specify the minimum indispensable staff to perform it. In this case, after specifying the operation, the system enters all the indispensable roles as mandatory.*

To select the room staff

- Click the **Edit** button on the command bar of the “Operation Record” page.
- Click the  button alongside the table (Fig 134 B).

The following window opens (Fig 135).



**Fig 135 – Select roles**

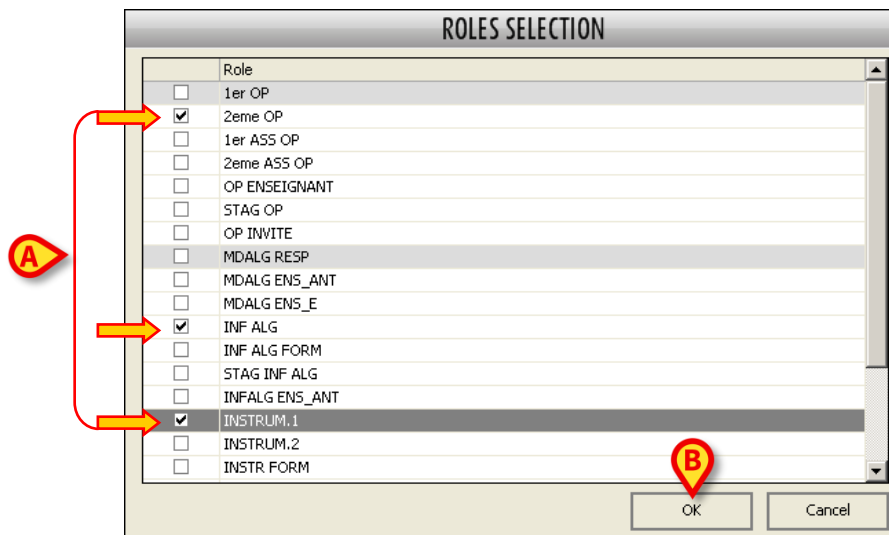
This window makes it possible to select the roles but not the names of the room staff.

The window contains the list of all possible roles. Alongside every role there is a selection box (Fig 135 A).

To select the roles

- Click the checkbox corresponding to the role required.

The corresponding role appears as selected (Fig 136 A).



**Fig 136 – Selected roles**

- Click the **Ok** button (Fig 136 B).

The list of selected roles is displayed in the “Planned Staff” table (Fig 137).

Role	Required	Personnel
1er OP	!	
MDALG RESP	!	
2eme OP	!	
INF ALG	!	
INSTRUM.1	!	

**Fig 137 – Selected staff**

The exclamation mark alongside every role indicates that no name has been specified for that role and there has been no declaration that any person qualified for that role is acceptable.

To declare that any person qualified for that role is acceptable, click the “Required” column in the box alongside the role (Fig 137 A). The list of roles changes as shown in Fig 138.

Role	Required	Personnel
1er OP	!	
MDALG RESP	✓	
2eme OP	✓	
INF ALG	✓	
INSTRUM.1	!	

**Fig 138 – Requested staff**

The ✓ icon alongside the role means that any person qualified for that role is acceptable (Fig 138 A).

To specify the name of the person requested, click the line corresponding to the role.

The following window is displayed (Fig 139).

The window is titled "PERSONNEL SELECTION". It features a "Name" text input field (marked with a red 'A' in a yellow circle) and a "Qualification" dropdown menu. To the right of the dropdown is a "Search" button (marked with a red 'B' in a yellow circle). Below these is a large table area with headers: "Code", "Last name", "First name", and "Qualification". The table body is currently empty. At the bottom of the window are four buttons: "Current", "OK", "Cancel", and "None".

**Fig 139 – Select room staff**

To search for a specific person type his/her name (or part of it) in the “Name” field (Fig 139 A) and then click the **Search** button (Fig 139 B).

The list of names containing the search string appears on the window. Select the wanted name and click **Ok**. The name appears on the line selected (Fig 140).

Role	Required	Personnel	
1er OP			
MDALG RESP	✓	MDALG RESP	
2eme OP	✓		
INF ALG	✓	INF ALG	
INSTRUM.1			

**Fig 140 – Selected staff**

You can either add or remove an item from the table by right clicking. Right click the “Planned staff” table to open the menu shown in Fig 141.

Role	Required	Personnel
1er OP	✓	
MDALG RESP		
1er ASS OP		
MDALG ENS_AN		
STAG OP		

Add items  
Remove item  
Clear all

**Fig 141**

Click “Add items” to open the window shown in Fig 136, and add new roles.

Click “Remove item?” to remove an item selected from the list of roles.

Click “Clear all” to clear all items from the list.



*Staff can be also scheduled, with different procedures, on the “Staff management” module, described in paragraph 9.*

*A “System Option” has been defined in order to avoid conflicts between the staff planned on the “Operation Record” (described in this paragraph) and the staff planned on the “Staff management” module.*

*This “System Option”, named **DisablePlannedStaffEditingOnOperationRecord**, if activated, enables staff editing on the “Operation Record” only if the operation is either in “Foreseen” or “Requested” state. The staff of the planned operations is only managed on the “Staff management” module.*

*To activate the system option set its Value=Yes.*

## 7.5 The “Special Services” area

The “Special Services” area (Fig 142) makes it possible to specify resources required for the operation.

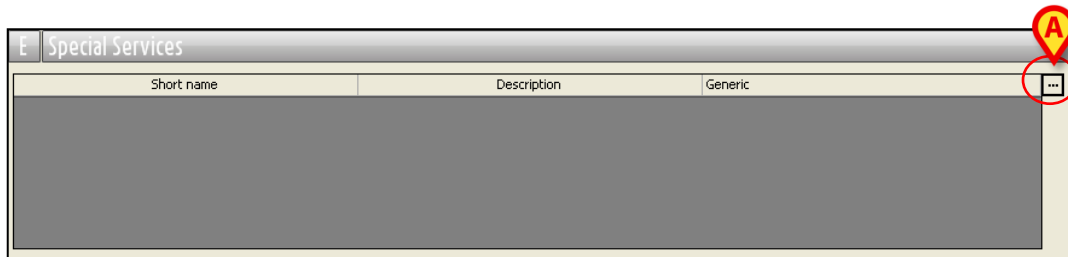



Fig 142 – The “Special Services” area

To specify the required resources

- Click the **Edit** button on the command bar of the “Operation Record” page.
- Click the  button alongside the area (Fig 142 A).

The following window opens (Fig 143).

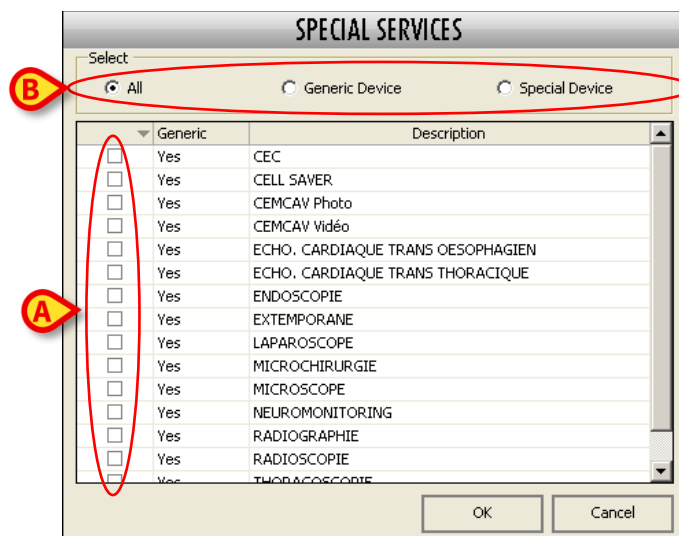


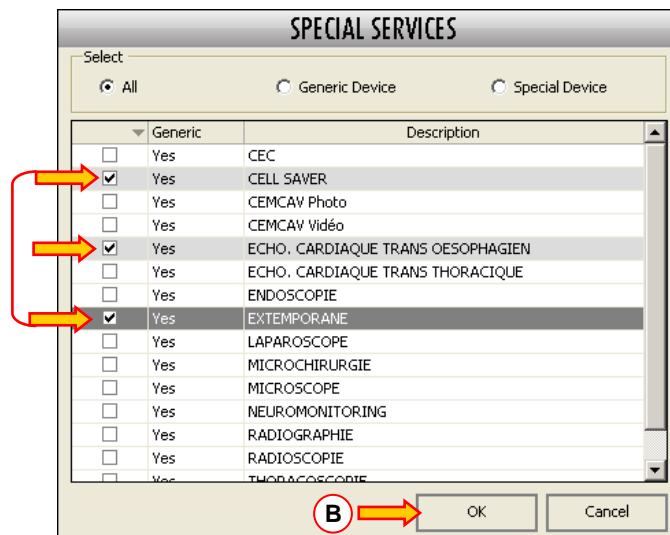
Fig 143 – Add resources

The window contains the list of all possible resource types. There is a selection box alongside every resource (Fig 143 A).

To select a resource

- click the checkbox corresponding to the resource required.

The box will be selected (Fig 144 A).



**Fig 144 – Resources selected**

- Click the  button (Fig 144 B)

The list of resources selected appears in the “Special Services” table of the “Operation Record” page (Fig 145).

Short name	Description	Generic
CELL SAVER	CELL SAVER	Yes
ETO	ECHO. CARDIAQUE TRANS OESOPHAGIEN	Yes
EXTP	EXTEMPORANE	Yes

**Fig 145 – List of resources**

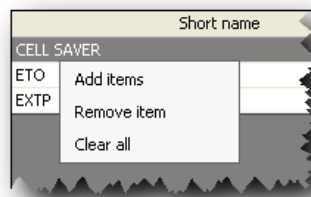
This table is split into two columns.

- The “Short name” column contains the abbreviation which identifies the resource.
- The “Description” column contains a brief description of the resource.

In the selection window there is a filter by Hospital Unit. If the filter is selected the window displays the resources linked to that Hospital Unit and all resources not linked to any Hospital Unit (Fig 143 B).

The presence of resources in an operating room/block or slot will be indicated by special icons on the scheduling pages (see paragraph 8.2.1 and Fig 175).

You can add or remove a resource from the table by right clicking.  
Right click the “Special Services” table to open the menu shown in Fig 146.



**Fig 146**

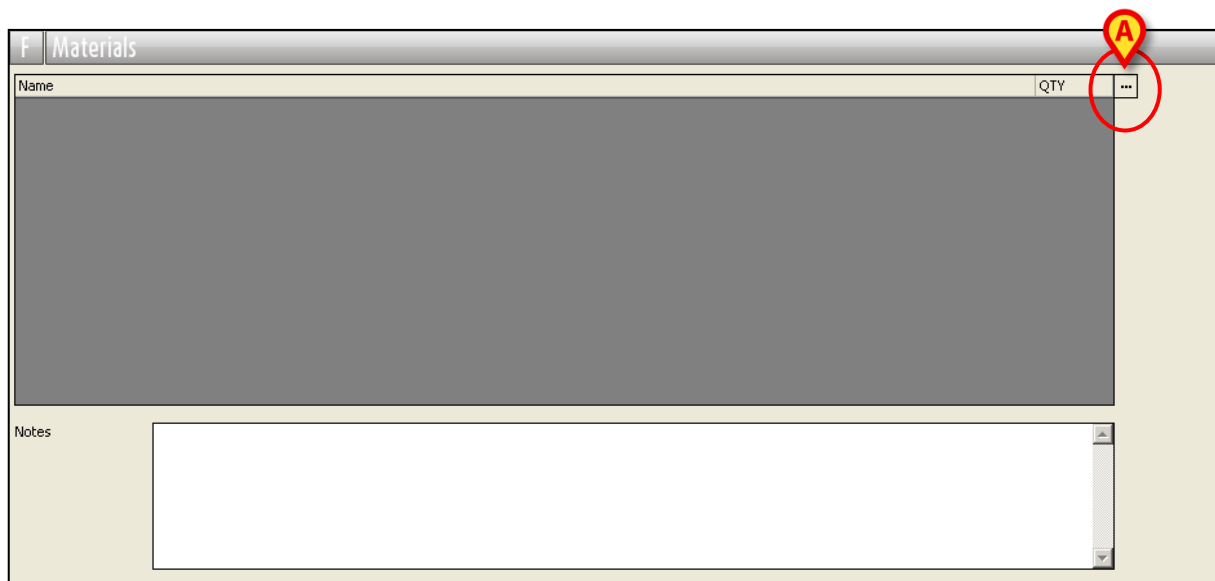
Click “Add items” to open the window shown in Fig 144 and add new resources.

Click “Remove item” to remove an item selected from the list of resources.

Click “Clear all” to clear all items from the list.

## 7.6 The “Materials” area

The “Materials” area makes it possible to schedule the required room materials (Fig 147).



**Fig 147**

To schedule the room materials

1. Click the **Edit** button on the command bar.
2. Click the [...] button placed alongside the “Materials” area (Fig 147 A).

The following window is displayed (Fig 148).

MATERIAL SELECTION				SCHED.	REQ.
1	2	3	4 * Name		
<b>RESEZIONE FEMORE DISTALE DX</b>					
Toolkits					
Base					
			cerchiaggio	<input type="checkbox"/>	1 0
			lambotte werbrugger	<input type="checkbox"/>	1 0
			sega batteria	<input type="checkbox"/>	1 0
			sega pneumatica	<input type="checkbox"/>	1 0
			sega pneumatica sinthes	<input type="checkbox"/>	1 0
			sutura adulti	<input type="checkbox"/>	1 0
			sutura oncologica	<input type="checkbox"/>	1 0
			sutura pediatrica	<input type="checkbox"/>	1 0
Generic series					
			anca	<input type="checkbox"/>	1 0
			anca revisione	<input type="checkbox"/>	1 0
			anca revisione molle	<input type="checkbox"/>	1 0
			anca revisione osso	<input type="checkbox"/>	1 0
			femore trauma molle	<input type="checkbox"/>	1 0
			femore trauma osso	<input type="checkbox"/>	1 0
			femore+traumatologia	<input type="checkbox"/>	1 0
			kit base 4 cl	<input type="checkbox"/>	1 0
			kit osso 4 cl	<input type="checkbox"/>	1 0
			Pediatrico grande A	<input type="checkbox"/>	1 0
			Pediatrico grande B	<input type="checkbox"/>	1 0
Specific series					
			alesatori	<input type="checkbox"/>	1 0
Specific for devices					
			CERCHIAGGIO HOWMEDICA	<input type="checkbox"/>	1 0
			GMRS 1/2 MISURE	<input type="checkbox"/>	1 0
			GMRS IMPATTATORI	<input type="checkbox"/>	1 0
			GMRS MISURE INTERE	<input type="checkbox"/>	1 0
			GMRS PROVE FEMORE PROX E DIST.	<input type="checkbox"/>	1 0

ADD OK Cancel

Fig 148

The resources that are linked by configuration to the operation selected as “Main operation” are listed on the window. The resources are ordered in a tree-structure and grouped in “baskets” and operating “kits”. The tree-structure is described in paragraph 7.6.1.

- Click the checkbox corresponding to the resources to be planned (Fig 148 A).

The box is this way checked (Fig 149 A).

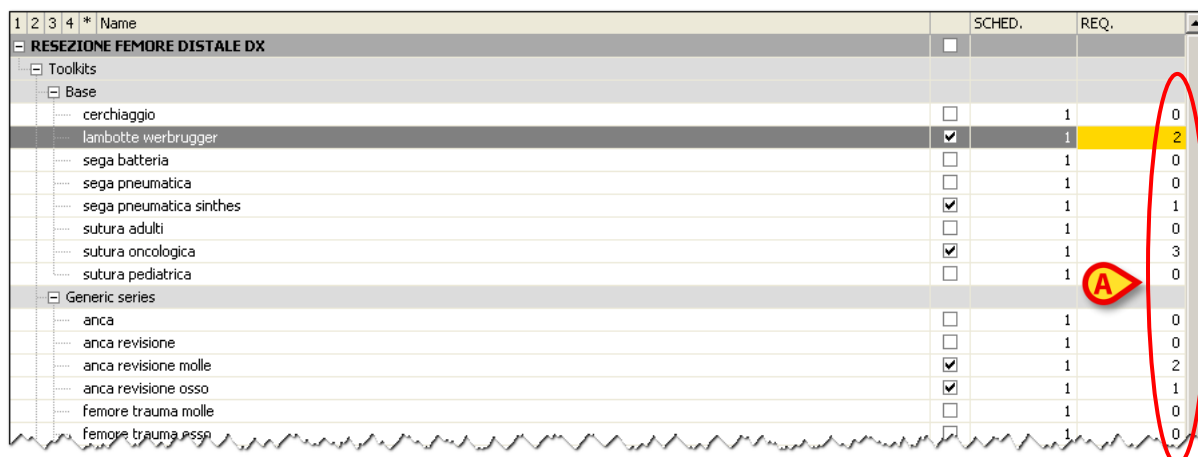
				SCHED.	REQ.
1	2	3	4 * Name		
<b>RESEZIONE FEMORE DISTALE DX</b>					
Toolkits					
Base					
			cerchiaggio	<input type="checkbox"/>	1 0
			lambotte werbrugger	<input checked="" type="checkbox"/>	1 1
			sega batteria	<input type="checkbox"/>	1 0
			sega pneumatica	<input type="checkbox"/>	1 0
			sega pneumatica sinthes	<input checked="" type="checkbox"/>	1 1
			sutura adulti	<input type="checkbox"/>	1 0
			sutura oncologica	<input checked="" type="checkbox"/>	1 1
			sutura pediatrica	<input type="checkbox"/>	1 0
Generic series					
			anca	<input type="checkbox"/>	1 0
			anca revisione	<input type="checkbox"/>	1 0
			anca revisione molle	<input checked="" type="checkbox"/>	1 1
			anca revisione osso	<input type="checkbox"/>	1 1
			femore trauma molle	<input type="checkbox"/>	1 0
			femore trauma osso	<input type="checkbox"/>	1 0
			femore+traumatologia	<input type="checkbox"/>	1 0

Fig 149

- Set the required quantity of each resource to be planned.



The required quantity is indicated in the last column on the right (Fig 150 A). The required quantity is set to 1 by default. This value can be edited when the corresponding cell is highlighted yellow. The cell is highlighted either when the resource is selected or by double-clicking the cell itself.



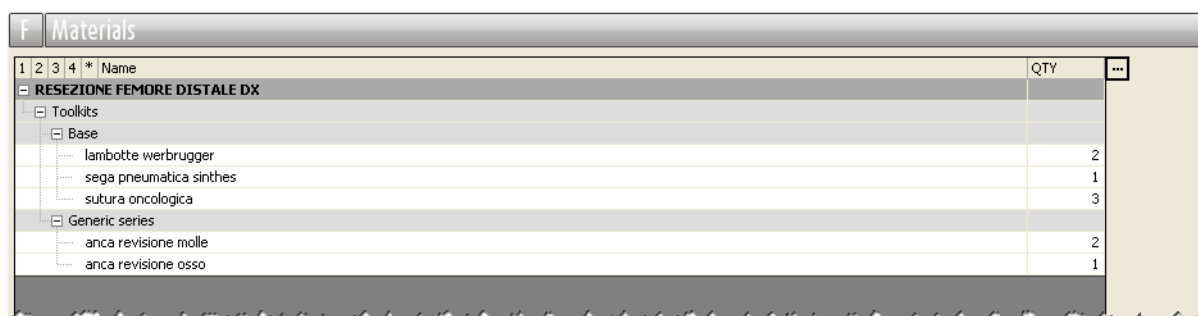
1	2	3	4	*	Name	SCHED.	REQ.
RESEZIONE FEMORE DISTALE DX							
Toolkits							
Base							
					cerchiaggio	<input type="checkbox"/>	1
					lambotte werbrugger	<input checked="" type="checkbox"/>	1
					sega batteria	<input type="checkbox"/>	1
					sega pneumatica	<input type="checkbox"/>	1
					sega pneumatica sinthes	<input checked="" type="checkbox"/>	1
					sutura adulti	<input type="checkbox"/>	1
					sutura oncologica	<input checked="" type="checkbox"/>	1
					sutura pediatrica	<input type="checkbox"/>	1
Generic series							
					anca	<input type="checkbox"/>	1
					anca revisione	<input type="checkbox"/>	1
					anca revisione molle	<input checked="" type="checkbox"/>	1
					anca revisione osso	<input checked="" type="checkbox"/>	1
					femore trauma molle	<input type="checkbox"/>	1
					femore trauma osso	<input type="checkbox"/>	1

Fig 150

When all the resources to be planned have been specified and the corresponding quantities have been indicated,

- Click the **Ok** button on the window, in the bottom-right corner of the window.

The planned resources are displayed in the “Materials” area of the “Operation record”. The tree-structure is maintained (Fig 151).





1	2	3	4	*	Name	QTY
RESEZIONE FEMORE DISTALE DX						
Toolkits						
Base						
					lambotte werbrugger	2
					sega pneumatica sinthes	1
					sutura oncologica	3
Generic series						
					anca revisione molle	2
					anca revisione osso	1

Fig 151

- Click the **Update** button on the command bar.

### 7.6.1 Table contents description

The resources are ordered on the table in a four levels tree-structure. These four levels are indicated in the top-left area of the window (Fig 152 A). Each one of the five buttons - **1 2 3 4 \*** - displays the “tree” up to the level corresponding to the clicked number. The star makes it possible to expand the whole tree. The different levels can be either hidden or displayed by clicking on the tree nodes. The nodes are represented by the ☐ and ☒ symbols (Fig 152 B). The first one, when clicked, hides the node; the second one displays it.

1	2	3	4	*	Name	QTY	...
RESEZIONE FEMORE DISTALE DX							
[-] Toolkits							
[-] Base							
					lambotte werbrugger	2	
					sega pneumatica sinthes	1	
					sutura oncologica	3	
[-] Generic series							
					anca revisione molle	2	
					anca revisione osso	1	

Fig 152

The first level represents the main operation (Fig 153).

1	2	3	4	*	Name
+ RESEZIONE FEMORE DISTALE DX					

Fig 153

Either kit, toolkits, series or single resources can be represented in the second level (Fig 154).

1	2	3	4	*	Name
[-] RESEZIONE FEMORE DISTALE DX					
+ Toolkits					

Fig 154

The kind of kit, series, toolkit or resource is specified in the third level (Fig 155).

1	2	3	4	*	Name
[-] RESEZIONE FEMORE DISTALE DX					
[-] Toolkits					
+ Base					
+ Generic series					

Fig 155

The fourth level lists the single resources (Fig 156).

1	2	3	4	*	Name
[-] RESEZIONE FEMORE DISTALE DX					
[-] Toolkits					
[-] Base					
					lambotte werbrugger
					sega pneumatica sinthes
					sutura oncologica
[-] Generic series					
					anca revisione molle
					anca revisione osso

Fig 156

## 7.6.2 How to schedule all the materials displayed by configuration

It is possible to quickly specify all the materials listed on the selection window.

To do that, on the “Materials selection” window (Fig 157),

1. Click the checkbox placed on the row corresponding to the main operation name (Fig 157 A).

The screenshot shows a window titled "MATERIAL SELECTION". It contains a table with columns: 1, 2, 3, 4, \*, Name, SCHED., and REQ. The table lists various materials under the main operation "RESEZIONE FEMORE DISTALE DX". A red circle labeled 'A' highlights the checkbox in the "SCHED." column for the first row, "RESEZIONE FEMORE DISTALE DX".

1	2	3	4	*	Name	SCHED.	REQ.
					RESEZIONE FEMORE DISTALE DX	<input checked="" type="checkbox"/>	
					Toolkits		
					Specific series		
					alesatori	<input checked="" type="checkbox"/>	1
					Generic series		
					anca	<input checked="" type="checkbox"/>	1
					anca revisione	<input checked="" type="checkbox"/>	1
					anca revisione molle	<input checked="" type="checkbox"/>	1
					anca revisione osso	<input checked="" type="checkbox"/>	1
					Base		
					cerchiaggio	<input checked="" type="checkbox"/>	1
					Specific for devices		
					CERCHIAGGIO HOWMEDICA	<input checked="" type="checkbox"/>	1
					Generic series		
					femore trauma molle	<input checked="" type="checkbox"/>	1
					femore trauma osso	<input checked="" type="checkbox"/>	1
					femore+traumatologia	<input checked="" type="checkbox"/>	1
					Specific for devices		
					GMRS 1/2 MISURE	<input checked="" type="checkbox"/>	1
					GMRS IMPATTATORI	<input checked="" type="checkbox"/>	1
					GMRS MISURE INTERE	<input checked="" type="checkbox"/>	1
					GMRS PROVE FEMORE PROX E DIST.	<input checked="" type="checkbox"/>	1
					GMRS PROVE STELI CURVI CEMENTATI	<input checked="" type="checkbox"/>	1
					GMRS PROVE STELI CURVI NON CEMENTATI	<input checked="" type="checkbox"/>	1
					GMRS PROVE STELI RETTI CEMENTATI	<input checked="" type="checkbox"/>	1
					GMRS PROVE TIBIA PER FEMORE DISTALE VERDE	<input checked="" type="checkbox"/>	1
					GMRS SCASSO TIBIALE VERDE	<input checked="" type="checkbox"/>	1
					GMRS ALESATORI RIGIDI CASSETTA VERDE	<input checked="" type="checkbox"/>	1
					Generic series		
					kit base 4 cl	<input checked="" type="checkbox"/>	1
					kit osso 4 cl	<input checked="" type="checkbox"/>	1
					Base		

At the bottom of the window, there are three buttons: "ADD", "OK", and "Cancel".

Fig 157

2. Click the **Ok** button on the window (bottom-right corner).

All the materials are this way inserted in the operation record (1 piece for each item if not differently specified - Fig 158).

F Materials					
1	2	3	4	* Name	QTY
RESEZIONE FEMORE DISTALE DX					
Toolkits					
Specific series					
alesatori					1
Generic series					
anca					1
anca revisione					1
anca revisione molle					1
anca revisione osso					1
Base					
cerchiaggio					1
Specific for devices					
CERCHIAGGIO HOWMEDICA					1
Generic series					

Fig 158

### 7.6.3 How to add a resource

To schedule a resource that is not already present in the pre-configured list, on the materials selection window (Fig 159),

1. Click the **Add** button (Fig 159 A).

MATERIAL SELECTION

1	2	3	4	* Name		SCHED.	REQ.
RESEZIONE FEMORE DISTALE DX					<input checked="" type="checkbox"/>		
Toolkits							
Specific series							
alesatori					<input checked="" type="checkbox"/>	1	1
Generic series							
anca					<input checked="" type="checkbox"/>	1	1
anca revisione					<input checked="" type="checkbox"/>	1	1
anca revisione molle					<input checked="" type="checkbox"/>	1	1
anca revisione osso					<input checked="" type="checkbox"/>	1	1
Base							
cerchiaggio					<input checked="" type="checkbox"/>	1	1
Specific for devices							
CERCHIAGGIO HOWMEDICA					<input checked="" type="checkbox"/>	1	1
Generic series							
femore trauma molle					<input checked="" type="checkbox"/>	1	1
femore trauma osso					<input checked="" type="checkbox"/>	1	1
femore+traumatologia					<input checked="" type="checkbox"/>	1	1
Specific for devices							
GMRS 1/2 MISURE					<input checked="" type="checkbox"/>	1	1
GMRS IMPATTATORI					<input checked="" type="checkbox"/>	1	1
GMRS MISURE INTERE					<input checked="" type="checkbox"/>	1	1
GMRS PROVE FEMORE PROX E DIST.					<input checked="" type="checkbox"/>	1	1
GMRS PROVE STELI CURVI CEMENTATI					<input checked="" type="checkbox"/>	1	1
GMRS PROVE STELI CURVI NON CEMENTATI					<input checked="" type="checkbox"/>	1	1
GMRS PROVE STELI RETTI CEMENTATI					<input checked="" type="checkbox"/>	1	1
GMRS PROVE TIBIA PER FEMORE DISTALE VERDE					<input checked="" type="checkbox"/>	1	1
GMRS SCASSO TIBIALE VERDE					<input checked="" type="checkbox"/>	1	1
GMSR ALESATORI RIGIDI CASSETTA VERDE					<input checked="" type="checkbox"/>	1	1
Generic series							
kit base 4 cl					<input checked="" type="checkbox"/>	1	1
kit osso 4 cl					<input checked="" type="checkbox"/>	1	1

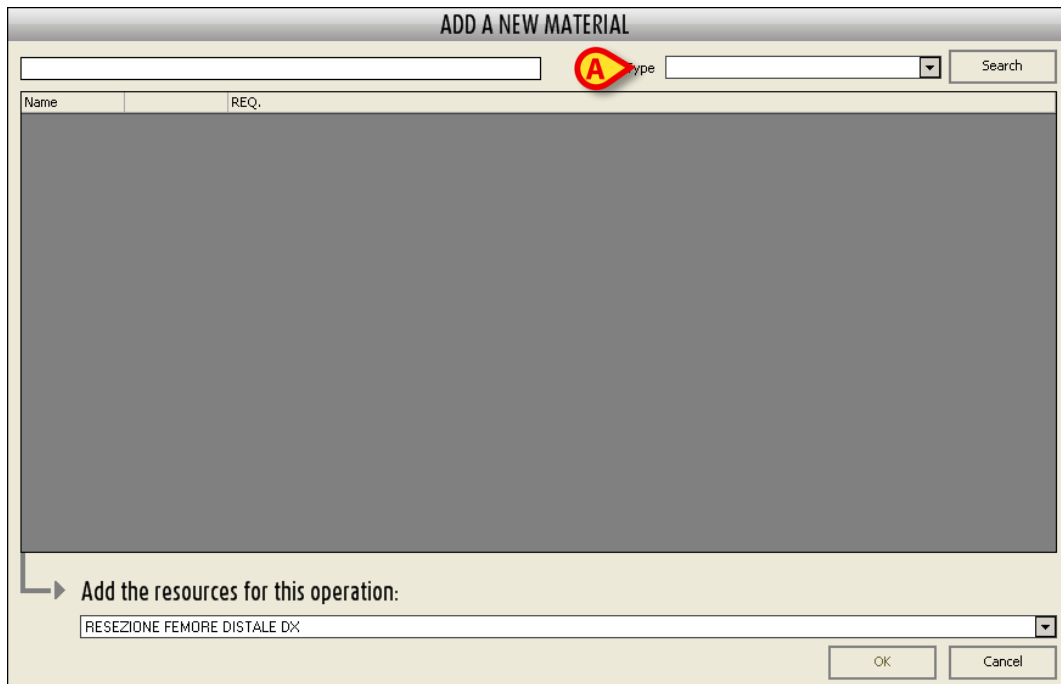
ADD

OK

Cancel

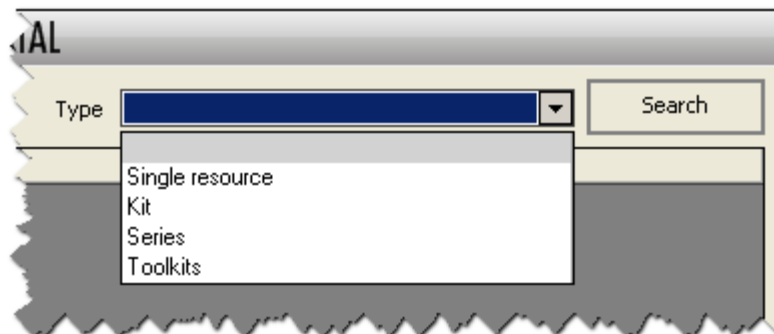
Fig 159

The following window opens (Fig 160).



**Fig 160**

2. Use the drop down menu indicated in Fig 160 A and enlarged in Fig 161 to indicate the kind of material to insert.



**Fig 161**

This menu makes it possible to choose the kind of item to be searched (either single resource, basket, kit or series). In the example shown in Fig 162 the “basket” option has been selected. All the possible baskets are now listed on the window. If, for example, the option “single resource” had been selected, the list of all the single resources would have been displayed. The same thing is true for the kits and the series.

**ADD A NEW MATERIAL**

Type: Toolkits
Search

1	2	3	*	Name	REQ.
[-] Toolkits					
[-] Base					
				ALADIN STRUM	<input type="checkbox"/> 0
				anteriore	<input type="checkbox"/> 0
				anteriore 4 cl	<input type="checkbox"/> 0
				bacinelle 4 cl	<input type="checkbox"/> 0
				batteria per seghe stryker	<input type="checkbox"/> 0
				cerchiaggio	<input type="checkbox"/> 0
				cerchiaggio in titanio	<input type="checkbox"/> 0
				CERVICALE DOTT. LAUS DENTISTA	<input type="checkbox"/> 0
				CHiodo DI HARRINGTON	<input type="checkbox"/> 0
				dermatomo pneumatico	<input type="checkbox"/> 0
				ferri dr. Cioni	<input type="checkbox"/> 0
				fil di k	<input type="checkbox"/> 0
				fil di k titanio	<input type="checkbox"/> 0
				lambotte werbrugger	<input type="checkbox"/> 0
				luer	<input type="checkbox"/> 0
				miculiz	<input type="checkbox"/> 0
				mini vascolari	<input type="checkbox"/> 0
				morsetto 4 cl	<input type="checkbox"/> 0
				morsetto piccolo	<input type="checkbox"/> 0

Add the resources for this operation:  

OK Cancel

**Fig 162**

- Insert the name (or part of the name) of the wanted toolkit in the field indicated in Fig 163 **A.**

The list of all toolkits corresponding to the typed text is displayed on the window.

**ADD A NEW MATERIAL**

Type: Toolkits
Search

1	2	3	*	Name	REQ.
[-] Toolkits					
[-] Generic series					
				femore trauma molle	<input type="checkbox"/> 0
				femore trauma osso	<input type="checkbox"/> 0
				femore+traumatologia	<input type="checkbox"/> 0
[-] Specific for devices					
				AUGMENTATION FEMORE DIST	<input type="checkbox"/> 0
				CCK PROVE-FEMORE	<input type="checkbox"/> 0
				CHIODI GK FEMORE DX (12-13-14) CON FENDIT.	<input type="checkbox"/> 0
				CHIODI K FEMORE DIAM 12-13 CL 4	<input type="checkbox"/> 0
				CHIODI K FEMORE DIAM 14-15 CL 4	<input type="checkbox"/> 0
				CHIODI K FEMORE DIAM 7-8-9-10-11 CL 4	<input type="checkbox"/> 0
				CHiodo ELASTICO FEMORE	<input type="checkbox"/> 0
				CHiodo G.K. FEMORE SN 12-13-14 CON FENDIT.	<input type="checkbox"/> 0
				CHiodo GK FEMORE DX SENZA FENDITURA	<input type="checkbox"/> 0
				CHiodo GK FEMORE SN SENZA FENDITURA	<input type="checkbox"/> 0
				CHiodo GK FEMORE STRUMENTARIO	<input type="checkbox"/> 0
				CHiodo T2 FEMORE	<input type="checkbox"/> 0
				GK FEMORE DX 10-15	<input type="checkbox"/> 0
				GK FEMORE DX CON FENDITURA	<input type="checkbox"/> 0
				GK FEMORE SX 10-15	<input type="checkbox"/> 0

Add the resources for this operation:  

OK Cancel

**Fig 163**

- Click the checkbox corresponding to the toolkit (or toolkits) to be scheduled (Fig 164).

**ADD A NEW MATERIAL**

femore      Type: Toolkits      Search

1	2	3	4	Name	REQ.
Toolkits					
Generic series					
				femore trauma molle	0
				femore trauma osso	0
				femore+traumatologia	0
Specific for devices					
				AUGMENTATION FEMORE DIST	0
				CCK PROVE-FEMORE	0
				CHIODI GK FEMORE DX (12-13-14) CON FENDIT.	0
				CHIODI K FEMORE DIAM 12-13 CL 4	0
				CHIODI K FEMORE DIAM 14-15 CL 4	0
				CHIODI K FEMORE DIAM 7-8-9-10-11 CL 4	0
				<b>CHIODO ELASTICO FEMORE</b>	<b>1</b>
				CHIODO G.K. FEMORE SN 12-13-14 CON FENDIT.	0
				CHIODO GK FEMORE DX SENZA FENDITURA	0
				CHIODO GK FEMORE SN SENZA FENDITURA	0
				CHIODO GK FEMORE STRUMENTARIO	0
				CHIODO T2 FEMORE	0
				GK FEMORE DX 10-15	0
				GK FEMORE DX CON FENDITURA	0
				GK FEMORE SX 10-15	0

**Add the resources for this operation:**

RESEZIONE FEMORE DISTALE DX

**OK**      **Cancel**

**Fig 164**

- Specify the required quantity on the cell indicated in Fig 164 A. The default quantity is 1.
- Click the **Ok** button (Fig 164 B).

The selected toolkit (or toolkits) will be added to the list of pre-configured resources, on the materials selection window, in the specified quantity (Fig 165 A).

**RESEZIONE FEMORE DISTALE DX**

1	2	3	4	Name	SCHED.	REQ.
Toolkits						
Specific series						
				alesatori	1	0
Generic series						
				anca	1	0
				anca revisione	1	0
				anca revisione molle	1	0
				anca revisione osso	1	0
Base						
				cerchiaggio	1	0
Specific for devices						
				CERCHIAGGIO HOWMEDICA	1	0
				<b>CHIODO ELASTICO FEMORE</b>	<b>0</b>	<b>1</b>
Generic series						
				femore trauma molle	1	0

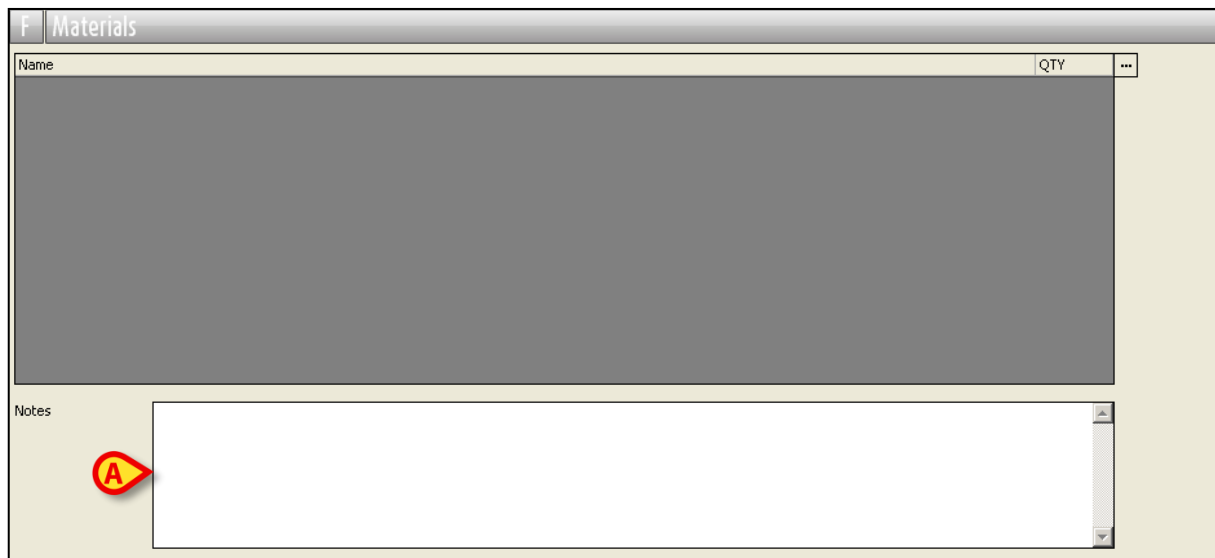
**Fig 165**

Repeat the procedure, if necessary, to add other resources. Otherwise,

- Schedule the selected materials using the procedure described in paragraph 7.6.

## 7.6.4 How to add a note

The “Notes” field placed in the “Materials” area of the “Operation record” (Fig 166 A) makes it possible to add all the information that can be meaningful for an accurate materials scheduling (for example: possible indications on the kind of material required, or on the way a certain material must be handled etc...).



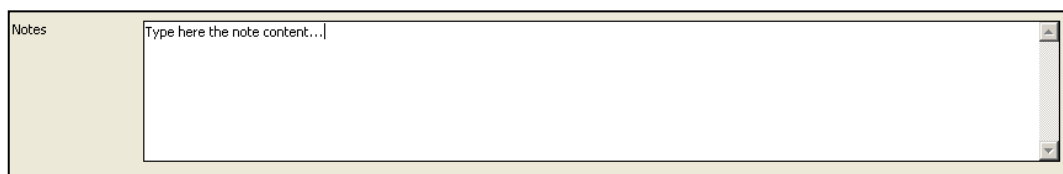
**Fig 166**

It is a free text field. To add a note

1. Click the **Edit** button on the command bar.
2. Click inside the “Notes” area.

A cursor appears on the area.

3. Type the note (Fig 167).



**Fig 167**

4. Click the **Update** button on the command bar.



## 8 The “Schedule” Module


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The “Schedule” module of the Smart Scheduler system makes it possible to add the operations requested to the operating schedule. This module makes it possible to schedule when and where an operation will be performed.

### 8.1 How to access the scheduling page

---

To access the “Schedule” module main page

- Click the corresponding icon -  - on the lateral bar.

Otherwise you can use the menu activated by the **Change** button on the command bar of the “Operation list” and “Operation record” screens (Fig 168 A)

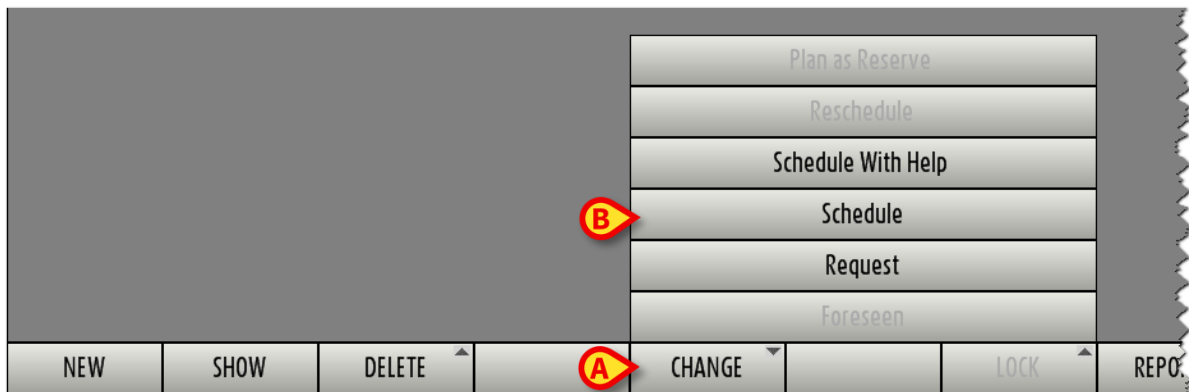


Fig 168

- Click, when enabled, the “Schedule” option (Fig 168 B).

The screen shown in Fig 169 will open.

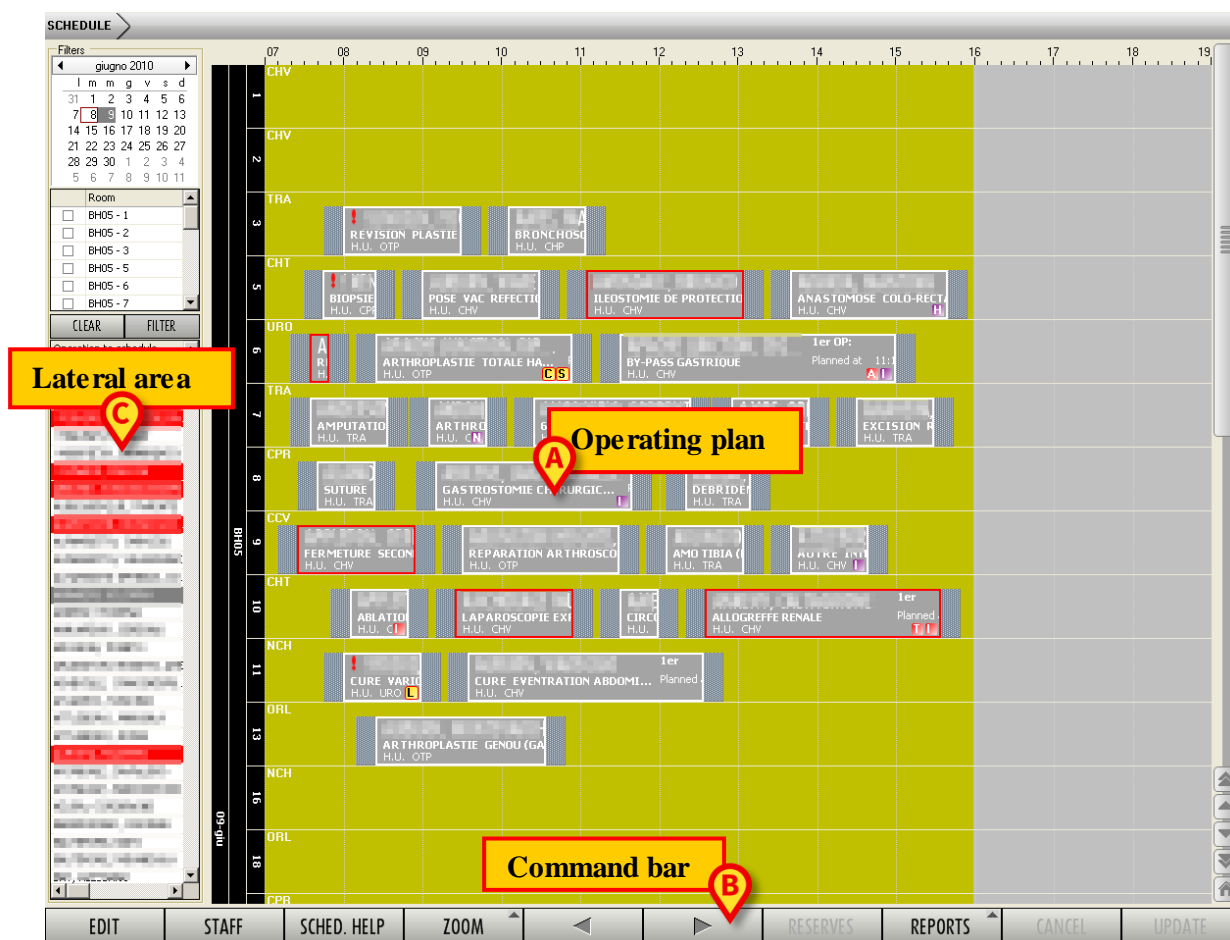


Fig 169 – Scheduling Page

This screen is formed of three areas.

- 1) The central part of the screen represents in a graphic form the operations schedule (Fig 169 A - see paragraph 8.2 for the description).
- 2) The command bar contains the function-button making it possible to perform different procedures (Fig 169 B - see paragraph 8.4 for a description).
- 3) The lateral area contains several tools making it possible to operate on the screen contents (Fig 169 C - see paragraph 8.3 for a description).



*Scheduling an operation makes the operation progress from “Requested” state to “Planned” state.*

## 8.2 The operating schedule

The central part of the page offers a graphic representation of the operating schedule of one or more operating day/s (Fig 169 A).

Every line represents the day of an operating room. Fig 170 highlights the line that represents the operating day in room 11. The number (or the name) of the room is indicated at the start of every line (Fig 170 A).

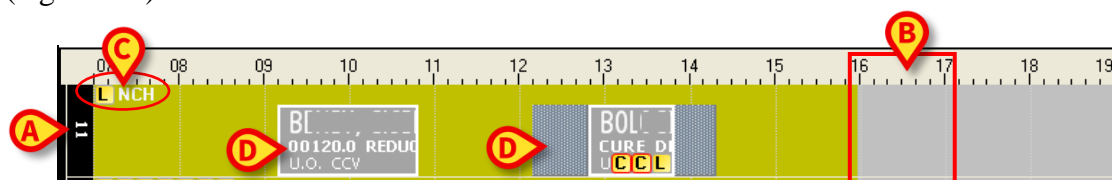


Fig 170 – Room 11

Every box represents a time of day. Fig 170 B highlights the box that indicates the hour from 16:00 to 17:00.

The number line above the central part of the page indicates the time.

The ochre yellow part indicates the hours during which the room is open and available for scheduling.

The gray part indicates the hours during which the room is closed. The room shown in Fig 170 is open from 7:00 to 16:00.

The letters highlighted in Fig 170 C indicate the resources available in the room, block or slot (yellow letters) and the location (NCH in this case). Every yellow letter represents a resource. The letter is configurable or if not configured is the initial letter of the name of the resource. For more details on the resources present move the mouse pointer on the letter. A tooltip containing the full list of the room resources appears (Fig 171).

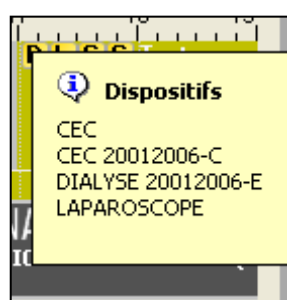


Fig 171 – Resources list

The gray rectangles highlighted in Fig 170 D represent the operations scheduled.

The various rooms are grouped into surgical blocks.

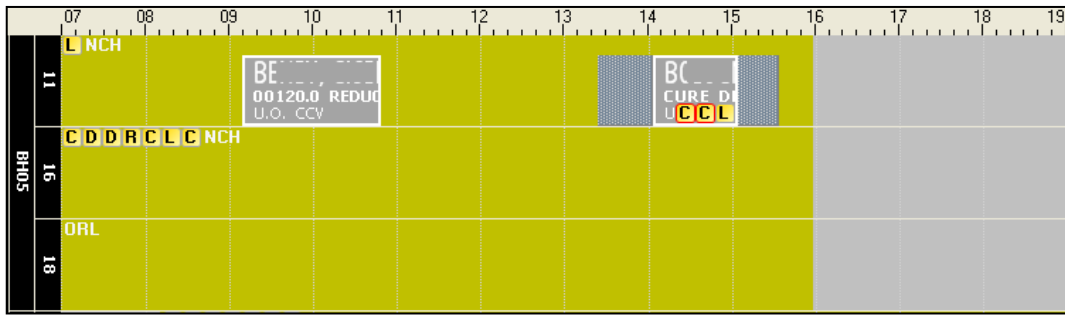


Fig 172 – Block BH05

In Fig 172, rooms 11, 16 and 18 are in block BH05.

The various blocks displayed make up the operating day.

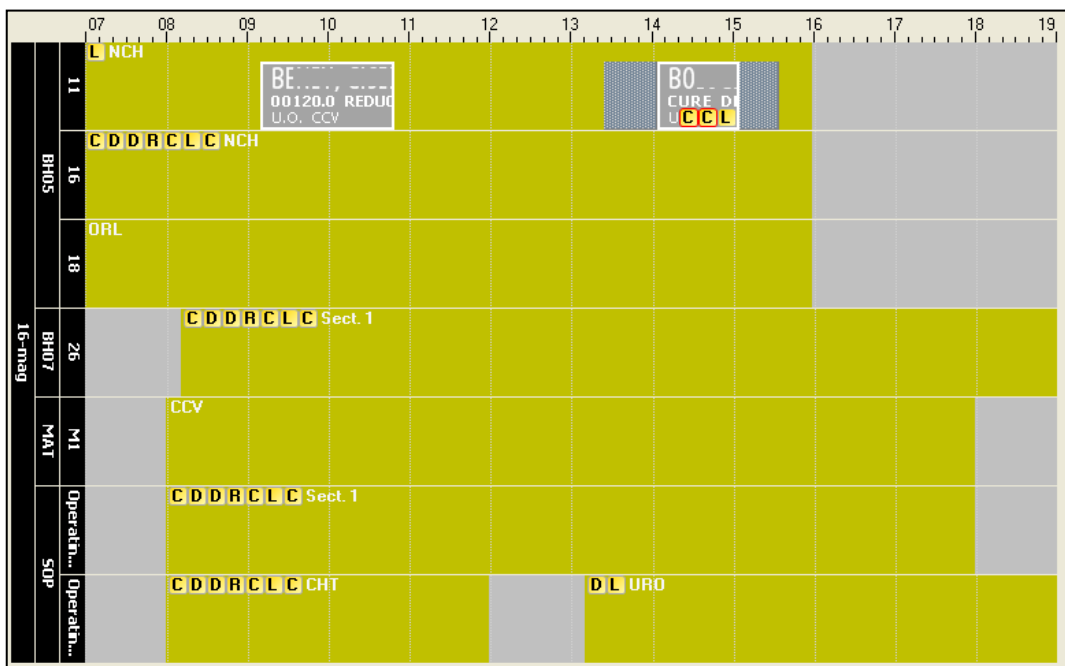


Fig 173 – Day 16/05

Fig 173 shows May 16.



Every user sees only the rooms in which he/she is permitted to work. This depends on the permissions held by the user. For information on the user definition procedure, contact the system administrator.

The scheduling grid can contain dark gray hatched areas (Fig 174 A).



Fig 174 – Unavailable Slot

These areas indicate periods of time in which the room displayed, despite being open, is not available for scheduling (due to tests, maintenance or other reasons).

### 8.2.1 The graphic representation of the operation

Every scheduled operation is represented on the daily schedule by a gray rectangle.

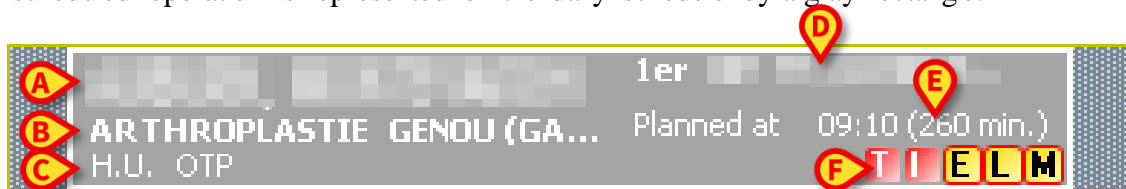


Fig 175 - Operation

The rectangle contains a variety of information.

- The name of the patient (Fig 175 A).
- The type of operation (Fig 175 B).
- The requesting hospital unit (Fig 175 C).
- The name (if indicated) of the first operator (Fig 175 D).
- The scheduled start time and duration of the operation (Fig 175 E).
- The resources required for the operation, the transmissible diseases, the allergies, the infections and the priority of the operation (Fig 175 F, Fig 176).



Fig 176 – Indication of Resources

The yellow letters - **E L M** - indicate the resources required for the operation. Every yellow letter indicates a resource. The letter is configurable, if it's not configured the initial letter of the name of the resource is displayed. When the letter is circled it means that the resource is not currently present in the room for which the operation is scheduled.


The purple letters **N**, **H** and **M** indicate the priority assigned to the operation. The priority indicators (the specific letters used) are configurable.




The blue letter **N** indicates that the operation has been scheduled to take place before the date suggested on the “Not before...” field on the “Operation record screen” (see paragraph 7.2.7).


The red letters - **T**, **I** - indicate the transmissible diseases, the allergies and the infections.

One or more requirements can be configured to be displayed on the “Operation box”. For instance: to indicate that an ICU bed is required after an operation, or to indicate that an operation requires no anesthesia. The requirement is displayed on the operation box as a small square, having customizable colour and indicating the first letter of the name of the requirement. In all cases, to

know the meaning of an icon, you can place the mouse pointer on it. The meaning will be displayed inside a “tooltip”.

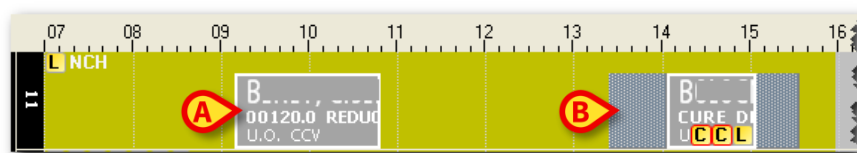
A red exclamation mark -  - placed on the top-left corner of the operation rectangle indicates that the information on the patient is provisional (see paragraph 4.3.1.1).

The three icons  -  -  placed on the top-left corner of the operation rectangle indicate that the operation is locked. The icon indicates the lock level. See paragraph 2.3 for the explanation of the operation “lock/unlock” functionalities.

The  icon placed on the top-left corner of the operation rectangle means that the current user cannot edit the operation.

The length of the operation rectangle is proportional to the operation duration. The longer the rectangle, the longer the duration.

The position of the operation rectangle in the scheduling grid indicates the scheduled start and end time and the room where the operation will be performed.



**Fig 177 – Position of operations in the grid**

The operation shown in Fig 177 A is scheduled for room 11, at 09:10 and should end at 10:50.

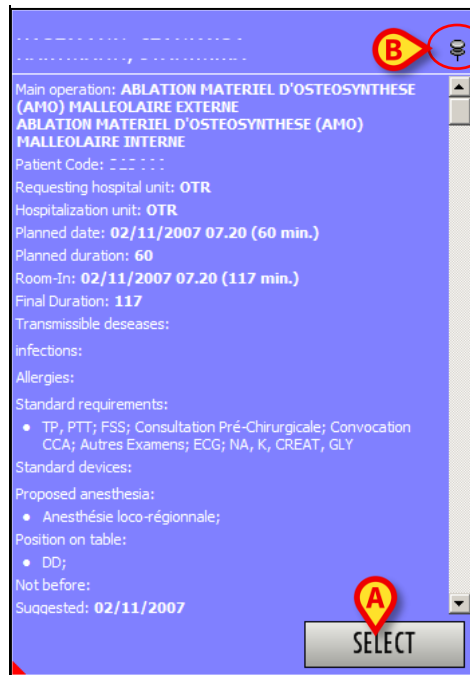
The operation shown in Fig 177 B is scheduled for room 11, at 14:00 and should end at 15:00

The dark gray areas indicated in Fig 178 represent the pre-surgical time (left) and post-surgical time (right) indicated on the “Operating record” screen. See paragraphs 7.2.15 and 7.2.16.



**Fig 178**

Click the operation rectangles to display a window containing a summary of the information available on the operation (Fig 179).



**Fig 179 – Operation data**

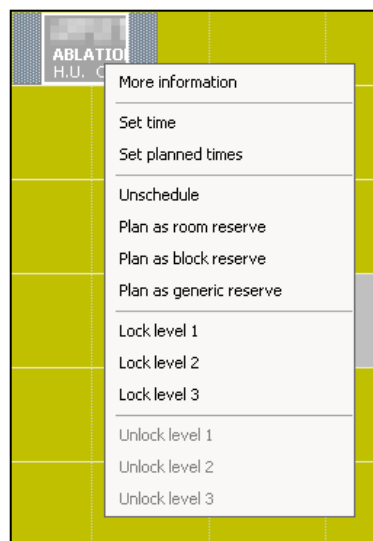
Click the **Select** button in the window (Fig 179 A) to access the “Operation Record” page relating to the operation clicked (Fig 49).

The window disappears automatically when you move the mouse.

To “fix it” to the page, click the thumbtack in the window (Fig 179 B).

### 8.2.1.1 Operation schedule direct editing

Right click the operation rectangles to open a menu making it possible to directly edit the operation schedule (Fig 180).



**Fig 180**



The functions described here are schedule changes and are only enabled after pressing the **Edit** button (see paragraph 8.5).

- The “More information” option opens the window shown in Fig 179.
- The “Set time” options displays a window in which you can enter a new start time scheduled for the operation (Fig 181).



Fig 181 – Set time

To set the new start time, enter the time required in the box and press the ENTER key. The rectangle is automatically moved to the point corresponding to the start time entered.



*An operation start time can also be changed using the mouse or keyboard.*

*With the mouse: after clicking the **Edit** button, simply drag the operation to the start time required.*

*With the keyboard: after selecting the operation (i.e., after clicking the **Edit** button and then the operation box) using the combinations of the “Alt + ←” and “Alt + →” keys, move the rectangle to the left and right.*

- The “Set planned times” option displays a window in which it is possible to enter separately the pre-surgical, surgical and post-surgical times (Fig 182).



Fig 182 – Set planned times

To set a new duration, enter (in minutes) the duration required in the box and press the ENTER key. The rectangle will be automatically enlarged or shrunk depending on the new duration entered.

In case of transmissible diseases and infections specified for the operation, the post-surgical time cannot be less than that added after the disease/infection specification.





*The scheduled duration of an operation can also be changed using the mouse or keyboard.*

*With the mouse: simply move the mouse to the right side of the rectangle, click and, keeping the button pressed, “enlarge” or “shrink” the rectangle.*

*With the keyboard: after selecting the operation (i.e., after clicking the **Edit** button and then the operation box) using the combinations of the “Ctrl + ←” and “Ctrl + →” keys, shrink or enlarge the rectangle.*

- The “Unschedule” option makes it possible to remove the operation from the daily schedule. Click this option to eliminate the operation rectangle from the scheduling grid and return the operation to the list of operations to be scheduled. See paragraph 8.5 for the operation scheduling procedures.
- The “Plan as room reserve” option makes the operation a room reserve. Click this option to eliminate the operation rectangle from the scheduling grid and indicate it as room reserve (see paragraph 8.5.5 for the explanation of the concept of reserve and for the connected procedures).
- The “Plan as block reserve” option makes the operation a block reserve. Click this option to eliminate the operation rectangle from the scheduling grid and indicate it as block reserve (see paragraph 8.5.5 for the explanation of the concept of reserve and for the connected procedures).
- The “Plan as generic reserve” option makes the operation a generic reserve. Click this option to eliminate the operation rectangle from the scheduling grid and indicate it as generic reserve (see paragraph 8.5.5 for the explanation of the concept of reserve and for the connected procedures).
- The various “lock/unlock operation” options make it possible to lock/unlock the operation at the wanted level. Only the options are enabled, that are logically consistent both with the context (i.e. with the possible lock level already specified) and with the permissions of the current user. See paragraph 2.3 for an explanation of the lock/unlock functionalities.

## 8.2.2 Color of boxes and operation state

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In the Smart Scheduler system, the operation boxes corresponding to operations in “Scheduled” state are light gray (Fig 183).



**Fig 183 – Smart Scheduler operation box**

The emergencies are red circled on the planning grid (Fig 184).



**Fig 184 - Emergency**

The Smart Scheduler system manages an operation in three states (see paragraph 2.2). These are:

- Foreseen
- Requested
- Scheduled

The Smart Scheduler-OranJ combined system envisages three further state for an operation. These are:

- Ready
- In progress
- Completed

These three states, which no longer refer to scheduling but to the performance of the operation, are managed by the DIGISTAT® OranJ system. The OranJ system indicates the operation state by the color of the relevant operation rectangle.

The “Ready” state is characterized by the color green (Fig 185).



**Fig 185 – Operation state: “Ready”**

The “In progress” state is characterized by the color cyan (Fig 186).



**Fig 186 – Operation state: “In progress”**

The “Completed” state is characterized by the color dark gray (Fig 187).



**Fig 187 – Operation state: “Completed”**

When the Smart Scheduler and OranJ systems work together, the changes in state recorded by OranJ are also visible in Smart Scheduler.

Therefore, an operation which progresses to “ready” state in OranJ will be displayed in Smart Scheduler as a green rectangle; an operation which progresses to “in progress” state in OranJ will be displayed in Smart Scheduler as a cyan rectangle and an operation which progresses to “completed” state in OranJ will be displayed in Smart Scheduler as a dark gray rectangle.

Once an operation has begun (i.e. it progressed to “in progress” state – cyan) it can no longer be changed using Smart Scheduler.

There are rare cases in which two operations overlap, having been scheduled at the same time from two different workstations. In this case, the operation rectangle will be red (Fig 188).



**Fig 188 – Overlapping operations**

In this case we suggest the rescheduling of the operation.



***In the case of overlapping operations, we suggest the rescheduling of the operation. See paragraph 8.5 for the scheduling procedure.***

The current day displayed on the Smart Scheduler “Schedule” module may not correspond to the current day displayed on the OranJ “Plan” module. This occurs due to the different purposes for which the two types of software are designed. Smart Scheduler is largely a scheduling tool, also suitable over the long term, for the activities of the surgical block, while OranJ is a tool for managing and monitoring the actual performance of the operating activity. The activity of a block may change suddenly and radically as a result of unscheduled activities which take absolute priority, and this means that the actual performance of the operating activity (correctly displayed by OranJ Plan) is different from that displayed in the scheduling of Smart Scheduler. The Smart Scheduler system updates its own plan on the basis of the changes registered by OranJ, but in the event of several changes made at the same time, it may not be usable to precisely display all the changes made.

Therefore, we suggest that you DO NOT use Smart Scheduler as a tool for monitoring the activities of a room, preferring the plan displayed by OranJ for this purpose.



***DO NOT use Smart Scheduler as a tool for monitoring the activities of a room. Use the plan displayed by OranJ for this purpose.***

## 8.3 The lateral area

The left side of the scheduling page (Fig 169 C, Fig 189) is divided in three areas.

- a date filter (Fig 189 A),
- a block and room filter (Fig 189 B),
- a table containing the list of all the operation in “Requested” state, ready to be scheduled (Fig 189 C).

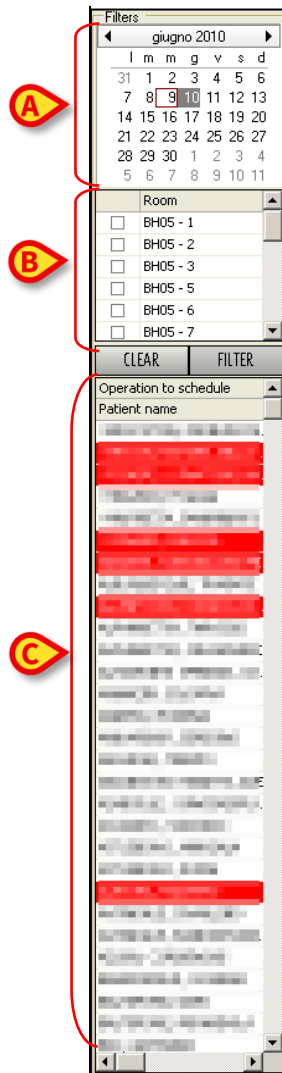


Fig 189 – Lateral area

### 8.3.1 Date filter

The calendar indicated in Fig 189 A and Fig 190 makes it possible to select the day displayed on screen.

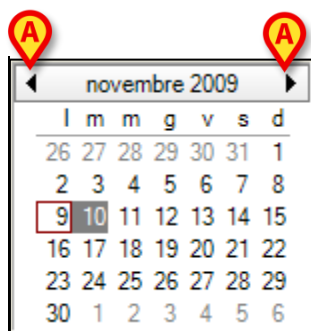


Fig 190 - Calendar

The day displayed on the scheduling grid is highlighted grey. The figure shown displays the 10<sup>th</sup> of November. The operations indicated on the scheduling grid are those relating to the 10<sup>th</sup> of November.

If the current day is different from that selected, it appears in a red box.

To display the schedule for a different day, click the number of the date required.

The arrows alongside the name of the month make it possible to change the month displayed (Fig 190 A).

In the example shown in the figure, the month of October 2009 is displayed by clicking the left arrow and the month of December 2009 is displayed by clicking the right arrow.

You can select (and therefore display) more than one day at a time. To do so, simply move the mouse to the days you wish to display, keeping the left button pressed. For example, if you select 10<sup>th</sup> and 11<sup>th</sup> of November together, the calendar will look like this.

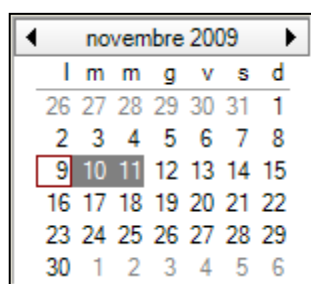


Fig 191 – Selecting several days together

The schedule of the two days will be displayed on the same screen.

You can display a maximum of 7 days at the same time.

### 8.3.2 Room filter

The “room” area makes it possible to display only the rooms selected (Fig 189 B, Fig 192).

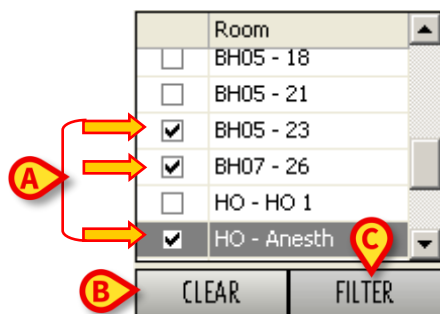


Fig 192 – Room Selection

The area shown contains the list of rooms which can be displayed. Alongside each room there is a selection box.

To display certain rooms only

- Click the checkboxes alongside the wanted room.

The boxes appear as selected (Fig 192 A).

- Click the **Filter** button (Fig 192 C)

In the example shown we have selected room 23 of block BH05, room 26 of block BH07 and room “Anesth” of block HO. After clicking the **Filter** button, the following grid is displayed.

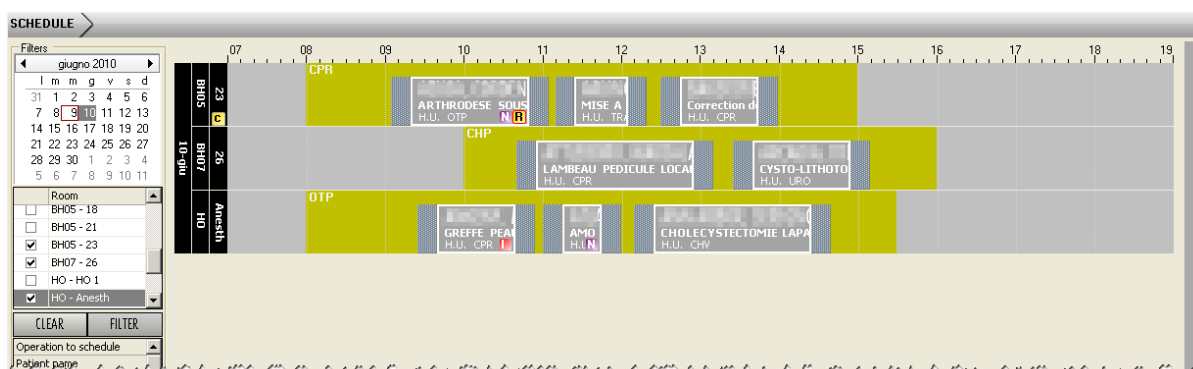


Fig 193 – Three rooms selected

To go back to displaying all the rooms

- Click the **Clear** button (Fig 192 B).

The rooms previously selected are deselected.

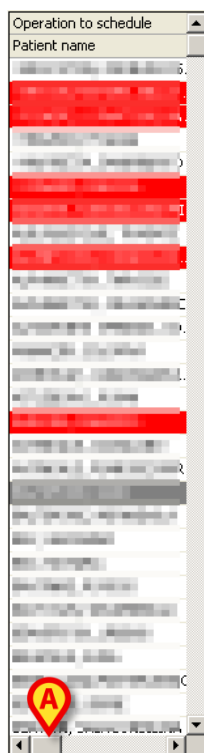
- Click the **Filter** button (Fig 192 C)

The grid containing all the rooms will be displayed again.

### 8.3.3 Operations to schedule

---

The “Operations to schedule” contains the list of operations still to be scheduled (Fig 189 C, Fig 194). The list comprises all and only those operations which have “requested” state and are in the rooms that the connected user has permission to see.



**Fig 194 – Operations to Schedule**

The area is split into four columns. For space-related reasons only one column can be displayed at a time.

The first column contains the names of the patients for whom an operation is requested.

Use the bar indicated in Fig 194 A to display the other columns. The other columns display the following information:

- the operation name;
- the planned duration;
- the priority of the operation;
- the emergency level (when the operation is an emergency it is highlighted red);
- the name of the first operator.

Click one of the lines in this area to display a window summarizing the information available on the operation (Fig 195).

Main operation: ABLATION MATERIEL D'OSTEOSYNTHESE (AMO) MALLEOLAIRE EXTERNE  
 ABLATION MATERIEL D'OSTEOSYNTHESE (AMO) MALLEOLAIRE INTERNE  
 Patient Code: - - - - -  
 Requesting hospital unit: OTR  
 Hospitalization unit: OTR  
 Planned date: 02/11/2007 07.20 (60 min.)  
 Planned duration: 60  
 Room-In: 02/11/2007 07.20 (117 min.)  
 Final Duration: 117  
 Transmissible diseases:  
 infections:  
 Allergies:  
 Standard requirements:  
 • TP, PTT; FSS; Consultation Pré-Chirurgicale; Convocation CCA; Autres Examens; ECG; NA, K, CREAT, GLY  
 Standard devices:  
 Proposed anesthesia:  
 • Anesthésie loco-régionnale;  
 Position on table:  
 • DD;  
 Not before:  
 Suggested: 02/11/2007

**SELECT**

**Fig 195 – Operation Data**

Click the **Select** button in the window (Fig 195 A) to access the “Operation Record” screen relating to the operation clicked (Fig 49).

When you are in “edit” mode, i.e., after the **Edit** button has been clicked, to display this information window you must right click the line corresponding to the operation.  
 A window like that shown in Fig 195 opens but this window has no **Select** button.

The list of operations contained in this table makes it possible to create a proper schedule. See paragraph 8.5 for the description of the scheduling procedures.




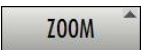






# 8.4 The command bar of the scheduling page

The control bar on the page (Fig 196) contains various buttons which make it possible to perform various operations. This paragraph briefly lists the functions of the different buttons. They will be explained in detail in the paragraphs indicated.



Fig 196 – Command bar of the “Schedule” screen

	This button makes it possible to schedule the operations. See paragraph 8.4.1 for the detailed procedure.
	This button makes it possible to display detailed information on the room staff scheduled for the operations. See paragraph 8.4.2.
	This button makes it possible to access the “Schedule with help” functionalities (Fig 227). See paragraph 8.7.
	This button makes it possible to change the way the sheduling grid is displayed. See paragraph 8.4.3.
 	These buttons make it possible to scroll the screen contents backwards or forward. The left arrow displays the plan related to a time preceding the time currently displayed; the right arrow displays the plan related to a time following the time currently displayed.
	This button makes it possible to display the detailed list of all reserves. See paragraph 8.4.4.
	This button makes it possible to create various kinds of print reports. See paragraph 8.4.5.

## 8.4.1 How to edit the operations schedule

The **Edit** button on the command bar (Fig 197) makes it possible to change the operations schedule.



Fig 197 – Command bar of the “Schedule” screen

Before making any changes to the schedule, it is necessary to click the **Edit** button.

After clicking this button, the control bar changes appearance and looks like the one shown in Fig 198.



Fig 198 – “Edit” mode

The **Edit** button appears as selected.

The **Cancel** and **Update** buttons are active.

The page is in “edit” mode meaning that it can be changed.

To make any changes to the schedule, in terms of time, date, room, duration, block, etc..., it is necessary to

- click the **Edit** button.

The screen turns to “edit” mode.

- Make the change required.
- Click **Update** to save the data.

The detailed procedure is explained in paragraph 8.5.

## 8.4.2 How to display information on the operating staff

The **Staff** button (Fig 199) makes it possible to access a page containing all the information on the room staff requested for the scheduled operations (Fig 200).



Fig 199 – Command bar of the “Schedule” screen

SCHEDULE

PLANNED STAFF


Patient	Operat...	Planned at	Duration	Room	1e	2e	1e	2e	O	ST	O	M	M	M	IN	IN	IN	IN	IN	IN	IN	AI	PE	C	CA	INF	SR
VE	82390 ...	27/02/2008	90	HEL	Fr							(I)															
	POSE...	27/02/2008	45	BH05	(I)							(I)															
	PATCH...	27/02/2008	120	BH07 - ORL 2	(I)							(I)															
IE	DISSE...	27/02/2008	120	BH07	Ali							(I)															
	SPLEN...	27/02/2008	120	BH07 - 26	Ne							(I)															
	DEBRI...	27/02/2008	120	HEL	Ko	Oli						Mi	Ca	Lo			Lis	Mi		M			Ca				
	40000...	27/02/2008	300	BH05 - 21	Mi							(I)															
	SEGME...	27/02/2008	90		Se							(I)															
	BYPAS...	27/02/2008	210		Al							(I)															
	REPAR...	27/02/2008	180	BH05	Ni	Da						(I)															
	RESEC...	27/02/2008	45	HEL - E1	Ya																						
	FORM...	27/02/2008	150	BH07	Pa																						
	CURE...	27/02/2008	90	BH07 - ORL 1	He																						
	94220...	27/02/2008	30		Ce																						
	FORA...	27/02/2008 7.00	120	BH05 - 11	Ga				Jo			(I)															
	09290...	27/02/2008 7.10	90	BH07 - ORL 2	Al	Mi						(I)															
	AMO M...	27/02/2008 7.10	90	BH05 - 18	A																						
	Tympa...	27/02/2008 7.15	90	BH05 - 13	Ch	W						(I)															
	Revisio...	27/02/2008 7.30	120	BH05 - 8	Ch	W						(I)															
	Ablatio...	27/02/2008 8.40	130	BH05 - 23	(R)	(R)						Ca															
	PANCR...	27/02/2008 9.00	300	BH07 - ORL 1	Ne							(I)															
	SEPTO...	27/02/2008 9.20	45	BH05 - 13	Ph							(I)															

Fig 200 – “Planned Staff” Page

The table shown in Fig 200 contains the main information on every operation scheduled during the day and in the rooms displayed.

Every line contains data relating to an operation.

The first 6 columns contain, in the following order

- The name of the patient to be operated on.
- The “information” symbol. Click the  symbol to open a window containing further information on the operation (see Fig 195).
- The type of operation scheduled.
- The start time and date scheduled for the operation.
- The scheduled duration.
- The scheduled block and room (if specified).

The remaining columns (Fig 200 A) show details of the information available on the operating staff.


Every column corresponds to a role.

The name of the person holding a specific role in a specific operation is found in the box where the role column and operation column intersect.

Not all roles are associated with a person. This is because the room staff need not necessarily be specified or may not be requested for a particular operation.


If a role has been indicated as “requested” but no specific name has been indicated for that role, the system places an (R) in the corresponding box (Fig 200 B).



*The (D) on the staff page corresponds to the  symbol of the “planned staff” page on the “Operation Record” screen (Fig 138 A).*

If a role has been entered among the scheduled staff but neither the name nor the fact that the role has been requested are specified, the system places an (!) in the corresponding box (Fig 200 C).



*The (!) symbol on the staff page corresponds to the  symbol of the “planned staff” area on the “Operation Record” page (Fig 138).*

The operations that appear highlighted on the staff page are reserves (Fig 200 **D**). See paragraph 8.5.5 for the explanation of the concept of reserve.

Operations highlighted in yellow are generic reserves.

Operations highlighted in green are block reserves.

Operations highlighted in blue are room reserves.

### 8.4.3 Zoom

---

The **Zoom** button on the command bar (Fig 201) makes it possible to change the time range displayed.



Fig 201 – Command bar of the “Schedule” screen

Click this button to open the different options possible (Fig 202).



Fig 202 – Change time range displayed

To change the time range displayed

- Click the **Zoom** button.

The options available appear (Fig 202).

- Click one of the options offered.

The page changes consequently. Click **4 hours**, for example, to display a range of 4 hours. Click **8 hours** to display a range of 8 hours etc.

### 8.4.4 How to display the reserves list

---

The **Reserves** button (Fig 203) makes it possible to display the detailed list of all reserves (Fig 204 A - See paragraph 8.5.5 for the explanation of the concept of reserve).



Fig 203 – Command bar of the “Schedule” screen

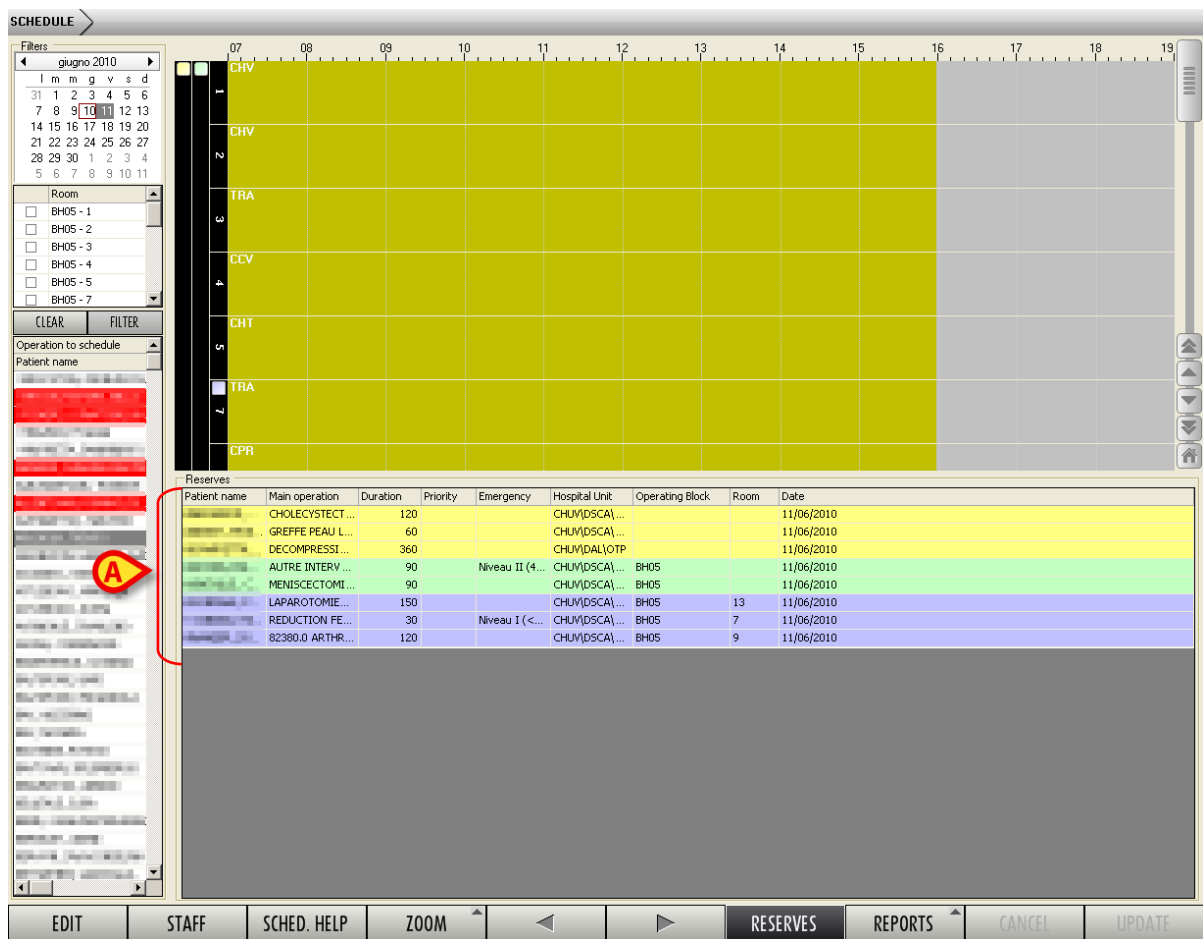


Fig 204 – All reserves

The list of reserves is presented in a table (Fig 204 A, Fig 205).

Patient name	Main operation	Duration	Priority	Emergency	Hospital Unit	Operating Block	Room	Date
	CHOLECYSTECT ...	120			CHUV\DSCA\...			11/06/2010
	GREFFE PEAU L...	60			CHUV\DSCA\...			11/06/2010
	DECOMPRESSI...	360			CHUV\DAL\OTP			11/06/2010
	AUTRE INTERV ...	90		Niveau II (4...	CHUV\DSCA\...	BH05		11/06/2010
	MENISCECTOMI...	90			CHUV\DSCA\...	BH05		11/06/2010
	LAPAROTOMIE...	150			CHUV\DSCA\...	BH05	13	11/06/2010
	REDUCTION FE...	30		Niveau I (<...	CHUV\DSCA\...	BH05	7	11/06/2010
	82380.0 ARTHR...	120			CHUV\DSCA\...	BH05	9	11/06/2010

Fig 205

Every line of the table shows data relating to an operation.

This data, arranged into columns, is

- the name of the patient,
- the type of operation scheduled,
- the scheduled duration,
- the level of priority assigned,

- the hospital unit of reference,
- the surgical block (if specified),
- the operating room (if specified),
- the scheduled date.

Operations highlighted in yellow are generic reserves (the block, room and time are not specified).

Operations highlighted in green are block reserves (the room and time are not specified).

Operations highlighted in blue are room reserves (the time is not specified).

## 8.4.5 Reports

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The **Reports** button (Fig 206) makes it possible to create a document which shows the information available on the operations scheduled.



Fig 206 – Command bar of the “Schedule” screen

To create the document

- Click the **Reports** button.

Several options are available. Their number and their nature depend on the configuration. Once the kind of document is selected, the system displays a print preview.

## 8.5 How to schedule an operation

The list of operations with “requested” state awaiting scheduling appears in the portion of the screen that appears in the bottom left corner of the page (Fig 207 A).

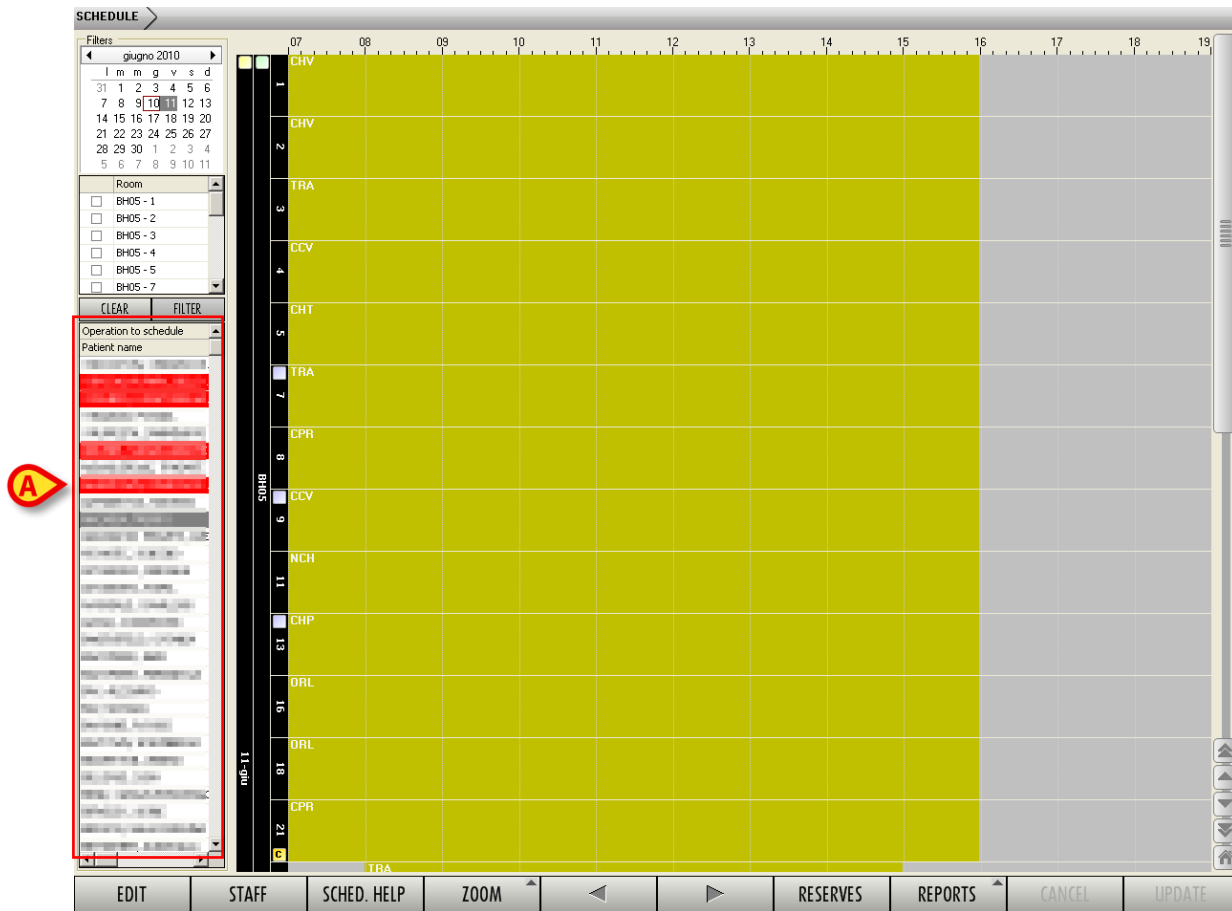


Fig 207 – List of operations to schedule

To schedule an operation, you must

- Click the **Edit** button on the command bar.

The screen turns to “edit” mode.

- Move the mouse pointer over the item in the list of “operations to schedule” that you wish to schedule (in the area indicated in Fig 207 A).
- Drag it to the scheduling grid, on the point corresponding to the wanted time and location.



*To “drag”, move the mouse pointer over the object required, left-click and, keeping the button pressed, physically move the object to the position required. The object (the box in this case) moves with the cursor.*



The operation disappears from the list of operations to schedule and appears, in the form of an operation rectangle, inside the scheduling grid (Fig 208 A).

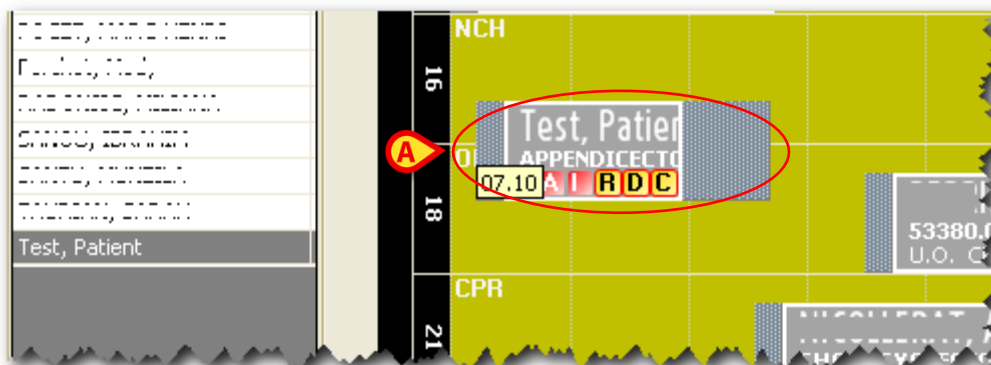


Fig 208 – Operation rectangle being dragged

- Release the mouse button.

The operation rectangle remains in the point required and the patient's name disappears from the list of operations to schedule (Fig 209 A).

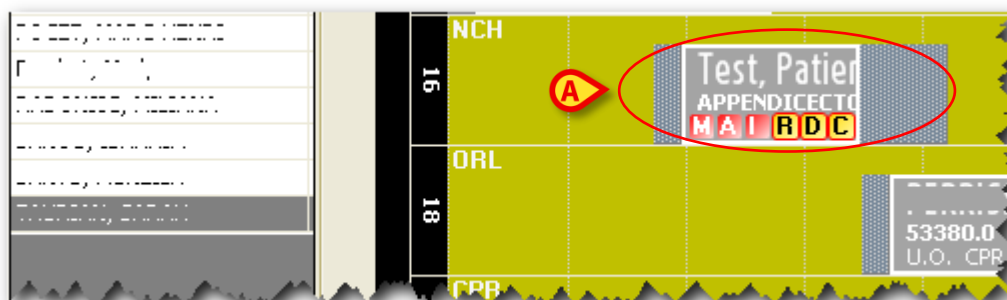


Fig 209 – Scheduled Operation

- Click the **Update** button on the command bar to save the change made.

The operation is now scheduled for the room and time required.

### 8.5.1 How to schedule an emergency operation

---

The “Emergencies” are highlighted red in the “Operations to schedule” area on the left of the screen (Fig 210).

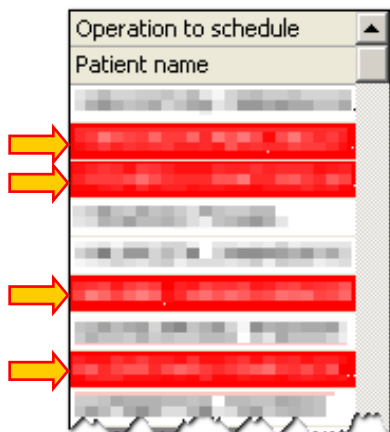


Fig 210

Specific user permissions are required in order to schedule an “Emergency”. These permissions, specified by configuration, make it possible to

- a) enable to schedule the “Emergencies”;
- b) enable to schedule the operations that are not “Emergencies” (called “Elective”).

These permissions are separate, i.e. a user can have them both enabled.



*When the scheduling of an “Elective” operation causes the re-scheduling of an “Emergency” operation the permissions to schedule the emergencies are required.*

The “Emergencies” are red circled on the planning grid (Fig 211).



Fig 211

### 8.5.2 How to remove an operation from the plan

---

To remove an operation from the planning grid

- Click the **Edit** button on the command bar.
- Move the mouse pointer over the operation-rectangle that must be removed from the plan.
- Drag the rectangle back on the “Operations to schedule” list (Fig 210 A).

- Click the **Update** button on the command bar to save the changes.

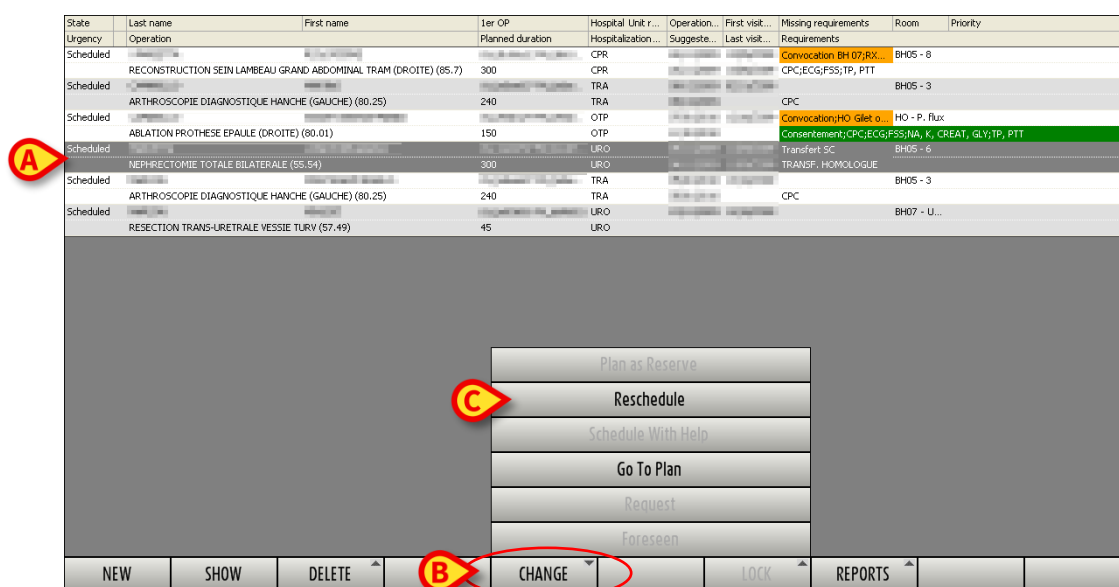
The operation goes back to “Requested” state.

### 8.5.3 How to reschedule an operation

To reschedule an operation, if you are on the scheduling page,

- click the **Edit** button on the command bar.
- Move the mouse pointer over the operation rectangle for which you wish to change schedule.
- Drag the rectangle to the point on the grid corresponding to the new time and/or new room.
- Click the **Update** button on the command bar.

Otherwise it is possible to change the scheduling of an operation by selecting it directly from the “Operation List” page (see paragraph 4).



State	Last name	First name	1er OP	Hospital Unit r...	Operation...	First visit...	Missing requirements	Room	Priority
Urgency	Operation		Planned duration	Hospitalization...	Suggeste...	Last visit...	Requirements		
Scheduled	RECONSTRUCTION SEIN LAMBEAU GRAND ABDOMINAL TRAM (DROITE) (85.7)		300	CPR			Convocation BH 07/RX...	BH05 - 8	
Scheduled	ARTHROSCOPIE DIAGNOSTIQUE HANCHE (GAUCHE) (80.25)		240	TRA			CPC,ECG,FSS,TP, PTT	BH05 - 3	
Scheduled	ABLATION PROTHESE EPAULE (DROITE) (80.01)		150	OTP			Convocation/HO Glet a...	HO - P. flux	
Scheduled	NEPHRECTOMIE TOTALE BILATERALE (55.54)		300	URO			Consentement;CPC,ECG,FSS;NA, K, CREAT, GLY;TP, PTT	BH05 - 6	
Scheduled	ARTHROSCOPIE DIAGNOSTIQUE HANCHE (GAUCHE) (80.25)		240	TRA			Transfert SC	BH05 - 3	
Scheduled	RESECTION TRANS-URETRALE VESSIE TURV (57.49)		45	URO			TRANSF. HOMOLOGUE	BH07 - U...	

Plan as Reserve  
 Reschedule  
 Schedule With Help  
 Go To Plan  
 Request  
 Foreseen

NEW SHOW DELETE CHANGE LOCK REPORTS

Fig 212

To do so, you must

- Access the “Operation list” screen (see paragraph 4).
- Search for the operation you wish to reschedule (see paragraph 4.1 for the search modes).

This operation must have “Scheduled” state.

- Click the row corresponding to the operation to reschedule.

The row will be highlighted (Fig 212 A).

- Click the **Change** button on the command bar (Fig 212 B).

A menu containing different options opens.


- Click the **Reschedule** option (Fig 212 C).

A window requesting confirmation of the operation opens (Fig 213).

A dialog box titled "REASON FOR RESCHEDULING". It has two input fields: "Reason" and "Status". The "Reason" field has a red callout 'A' pointing to it. The "Status" field has a red callout 'B' pointing to a dropdown arrow on its right. Below the fields is a blue progress bar. At the bottom are "OK" and "CANCEL" buttons.

Fig 213 – Rescheduling an operation

- Enter the reason for rescheduling in the “Reason” field (Fig 213 A).

The possible reasons can be pre-defined during configuration. In this case you can click the  button alongside the “Reason” field and choose from the options offered.

- Click the  button alongside the “State” field (Fig 213 B).

A menu offering the choice between four options opens (Fig 214).

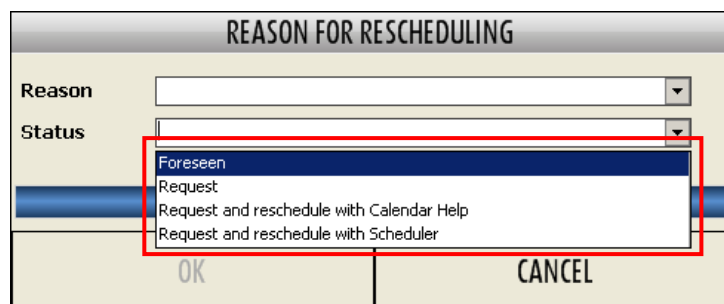
The same dialog box as in Fig 213, but the "Status" dropdown menu is open, showing four options: "Foreseen", "Request", "Request and reschedule with Calendar Help", and "Request and reschedule with Scheduler". A red rectangle highlights the menu options.

Fig 214 – Rescheduling options

Each of them allows the performance of a different operation.

The “Foreseen” option makes it possible to take the operation back to the “Foreseen” state.

The “Request” option makes it possible to take the operation back to the “Requested” state.

The “Request and reschedule with calendar help” option takes the operation back to the “Requested” state and gives direct access to the “Schedule with help” page (Fig 227, paragraph 8.7).

The “Reschedule” option takes the operation back to the “requested” state and gives direct access to the scheduling page (Fig 169, paragraph 8.2).

- Click the option required.
- Click the **Ok** button.

## 8.5.4 Locked operations

It is possible, on the scheduling screen, to lock a single operation. It is also possible to lock all the operations of a room, a slot, a block, a day at the same time. A locked operation is an operation which cannot be rescheduled.



*The term “slot” indicates the length of time in which an operating room is available to a hospital unit for scheduling. From the graphic point of view, the slot is indicated on the scheduling grid as an ochre yellow colored area.*



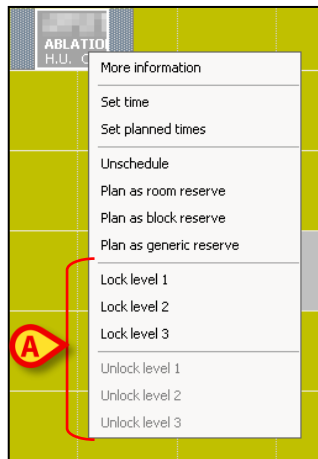
**Fig 215 - Slot**

The goals and features of the “Lock/unlock operation” functionalities are described in paragraph 2.3.

To lock/unlock an operation

- Click the **Edit** button on the command bar.
- Move the mouse pointer on the rectangle corresponding to the operation to be locked/unlocked.
- Right click.

A window containing various options appears (Fig 216). The lock/unlock options are indicated in Fig 216 A.

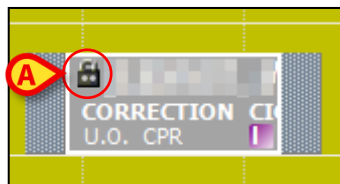


**Fig 216 – Lock Operations**

Only the options that are consistent with the context and the user permission level are available.

- Click the required “Lock” option.

On the operation rectangle, in the top-left corner, the icon corresponding to the lock level chosen appears (Fig 217 A).



**Fig 217 - Operation locked level 2**

- Click the **Update** button on the command bar to save the change made.

To lock/unlock all the operations of a slot

- Click the **Edit** button on the command bar.
- Move the mouse pointer on the relevant slot.
- Right click.

The window shown in Fig 216 appears.

- Click the required “Lock” option.

All the operation in the slot will be locked/unlocked.

- Click the **Update** button on the command bar to save the change made.

To lock/unlock all the operations in a room the procedure is the same, only you must right click the black bar indicating the room number (Fig 218 A) and then click the required “lock” option.

To lock/unlock all the operations in a block you must right click the black bar indicating the name of the block (Fig 218 **B**) and then click the required “lock” option.

To lock/unlock all the operations in an operating day you must right click the black bar indicating the date (Fig 218 **C**) and then click the required “lock” option.

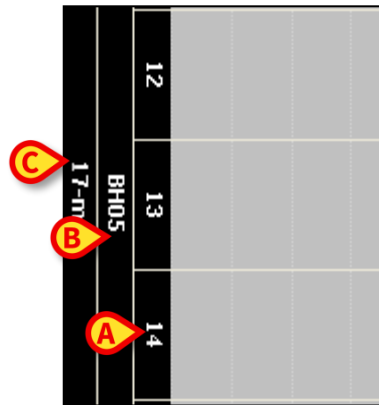


Fig 218



*Only the operations scheduled either for the current day or for a day in the future can be locked/unlocked. The operations scheduled for a day in the past and not yet performed cannot be locked/unlocked.*



*When all the operations of either a room, a slot, a block or a day are unlocked at a certain level, the action affects only the operations that are locked at that same level.*

*That is, for instance:*

*there are three operations scheduled in a room: two of them are locked at level 2, one of them is locked at level 3. If the room is “unlocked level 2”, then only the operations locked level 2 will be unlocked (and will pass to level 1). The operation locked at level 3 remains locked at level 3.*

### 8.5.5 Reserves

Reserves are those operations for which no time slot, block or room have been assigned, but which are included in the daily schedule.

The “reserve” concept has been introduced to enable the immediate scheduling of emergency operations which become necessary from one minute to the next. The criterion observed for these urgent cases is “as soon as a place is free, the operation goes ahead”.

The Smart Scheduler system envisages three types of reserve:

- 1) room reserve (the operation has been assigned a block and an operating room but not a time – this type of reserve is identified by the color blue);
- 2) block reserve (the operation has been assigned a block, but neither an operating room nor a time – this type of reserve is identified by the color green);
- 3) generic reserve (the operation has been assigned neither a block, nor an operating room nor a time – this type of reserve is identified by the color yellow).

The list of all reserves can be displayed by clicking the **Reserves** button on the command bar (see paragraph 8.4.4 and Fig 204 for the description of the relative page).

#### 8.5.5.1 How to create a reserve

---

To create a reserve,

- click the **Edit** button on the command bar.

The screen turns to “edit” mode.

- Move the mouse pointer over either one of the operations in the list of “operations to schedule” (Fig 219 **A**) or one of the operations already in the scheduling grid.

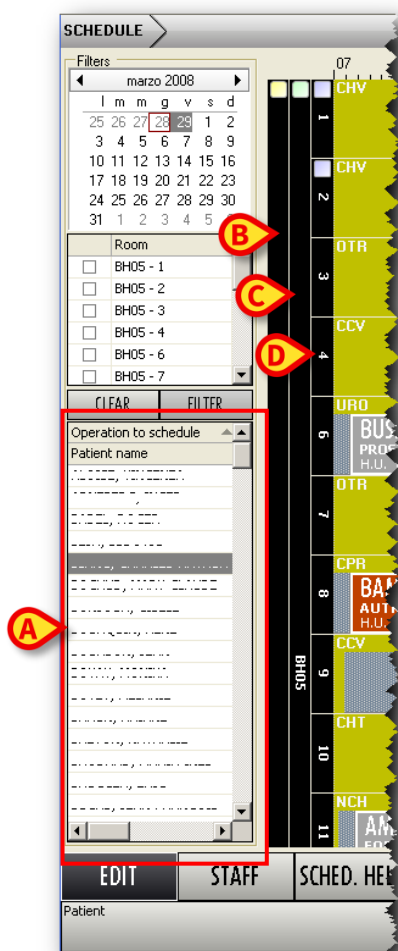
Left-click it and drag it to the black bar indicating the day, block or room (Fig 219 **B**, **C**, **D**).

If the operation is dragged to the bar indicating the day (Fig 219 **B**) a generic reserve is created.

If the operation is dragged to the bar indicating the block (Fig 219 **C**) a block reserve is created.

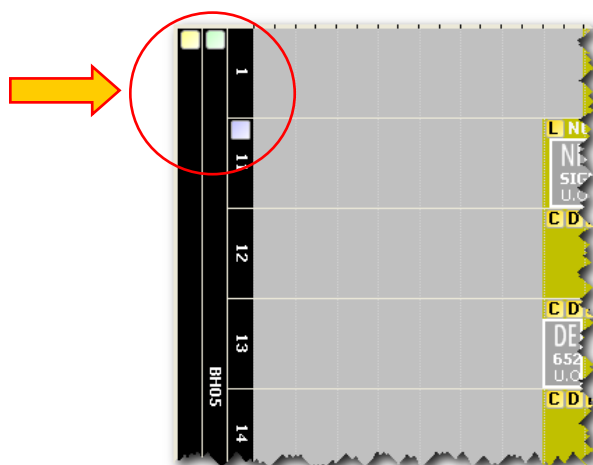
If the operation is dragged to the bar indicating the room (Fig 219 **D**) a room reserve is created.






**Fig 219 - Reserves**


When there are reserves, special icons appear on the black bar (Fig 220 ).



**Fig 220 – Reserve Indication**

The  icon indicates the presence of at least one generic reserve for the day displayed.

The  icon indicates the presence of at least one block reserve for block BH05.

The  icon indicates the presence of at least one room reserve for room 11.

Click one of the icons to open the list of all reserves (Fig 204).

To add a reserve to the scheduling grid, after clicking the **Edit** button on the command bar, click the corresponding row in the “reserves” table (Fig 205) and drag it to point of the grid corresponding to the room and time required.

To return a reserve to the list of operations to schedule, after clicking the **Edit** button on the command bar, click the corresponding row in the “reserves” table (Fig 205) and drag it back to the “Operations to schedule” area.

## 8.6 Calendar

The “Calendar” screen of the DIGISTAT® “Smart Scheduler” system offers an overview of the operating room and block schedule (Fig 221).

To access this screen

- click the  icon on the lateral bar.

The screen shown in Fig 221 will open.

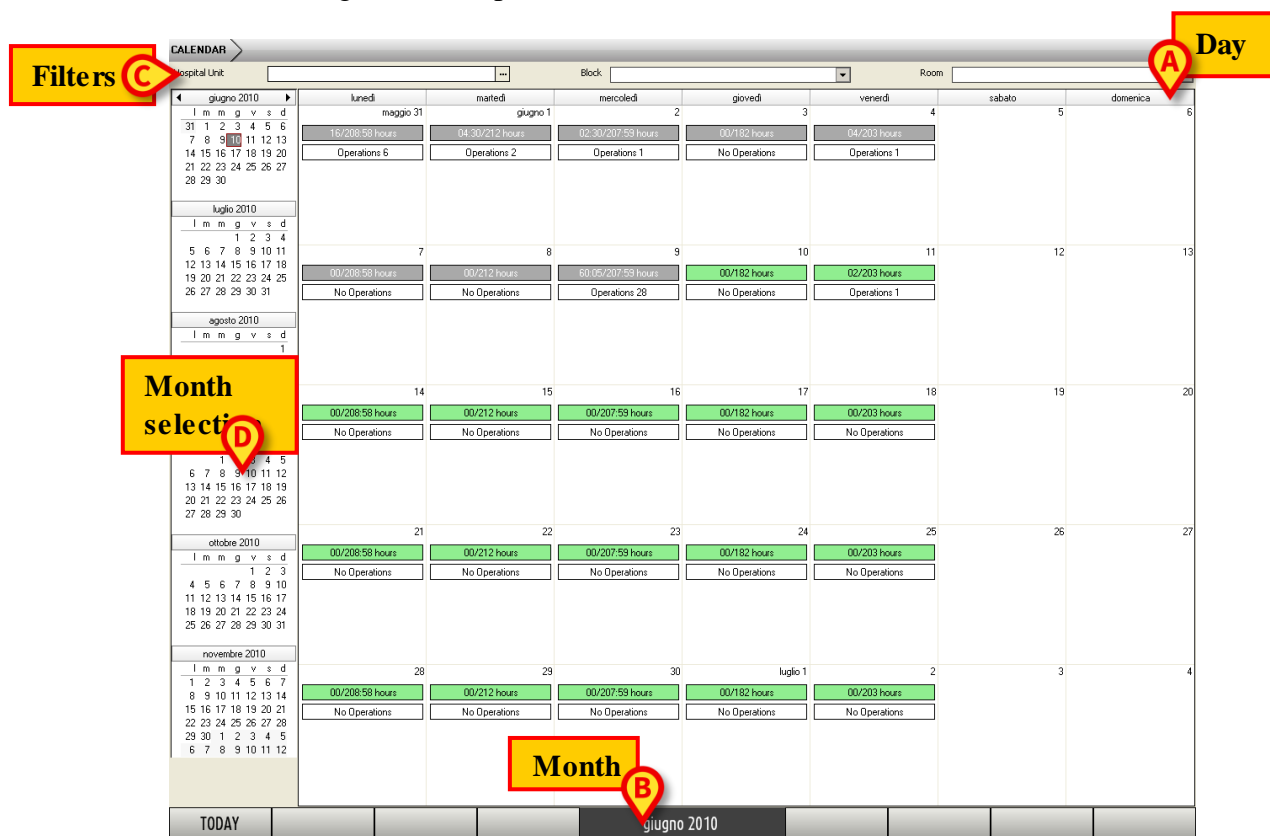


Fig 221 - Calendar

The central part of the page displays the calendar of the month you have decided to look at.

Every box represents an operating day (Fig 222).

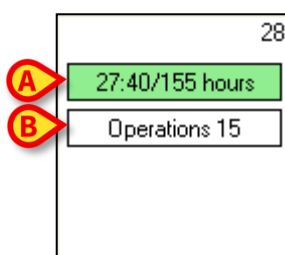


Fig 222 – Operating Day

The number in the top right corner of every box indicates the day to which the box refers.

The name of the day can be read on the bar at the top (Fig 221 A), the name of the month can be read on the central button of the control bar (Fig 221 B).

The box contains information on the scheduling of the operating rooms in the hospital units selected.



*Every user, depending on his role and level of permissions, may display the situation only of the rooms for which he is responsible.*

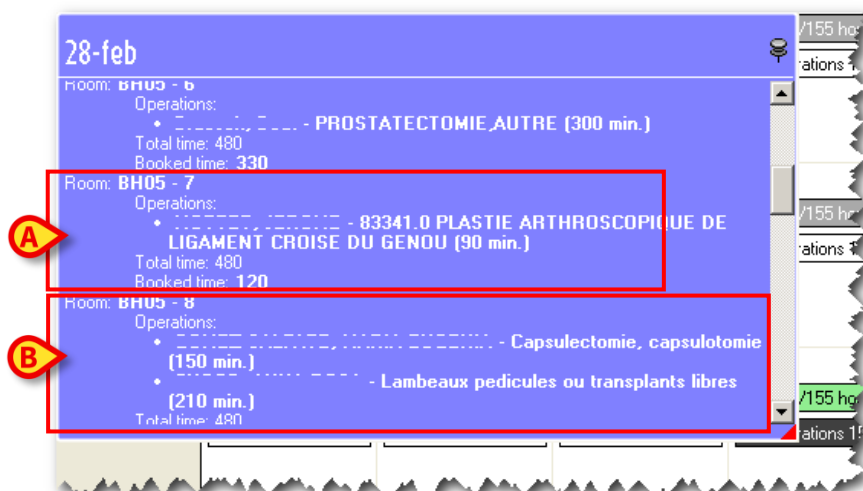
The square indicated in Fig 222 A indicates the number of hours allocated with respect to the total hours available. The box shows that, of the total 155 available for scheduling, 27 hours and 40 minutes are already allocated to operations.

The color green indicates that the day considered has time available for scheduling.

If the day of reference has passed, the square is gray.

The square highlighted in Fig 222 B indicates the number of operations scheduled for that day.

Click this box to open a window containing detailed information concerning the situation of every room (Fig 223).



**Fig 223 – Information Window**

The example shown in Fig 223 A informs us, for example, that room 7 of block BH05 has 1 operation reserved for the day selected (you can read the patient's name, the type of operation and the duration scheduled), that the total time available in this room is 480 minutes and that the time occupied by operations is 120 minutes.

Moving downwards, we find information on all the rooms managed by the user connected on the day selected. In Fig 223 B for example, we can see that room 8 of block BH05 has two operations scheduled, that the total time available is 480 minutes and that 420 minutes are occupied.

## 8.6.1 Selecting the month

---

The left side of the page makes it possible to select the month to display (Fig 221 D). This part of the screen displays 6 months. Click one of them to display it, enlarged, in the center of the page.



Fig 224

The arrows indicated in Fig 224 make it possible to display and select past months (left arrow) and future months (right arrow).

The month may also be selected by clicking the name of the month. A menu which makes it possible to directly select the month required opens (Fig 225).

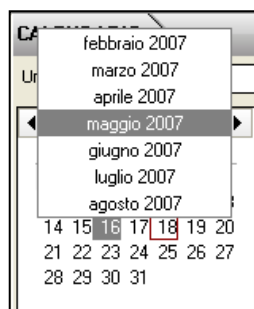


Fig 225

Click the **Today** button in the bottom left corner of the command bar to return to display the current month.

## 8.6.2 Selection filters

---

The fields in the upper part of the “Calendar” page make it possible to select the Hospital Unit, Block or Room to which the data on screen are referring (Fig 221 C, Fig 226).



Fig 226

If any value is specified inside these fields the data displayed on screen are calculated only referring to the Hospital Unit, Block, Room specified.

## 8.7 Schedule with help

The schedule with help page (Calendar Schedule - Fig 227) makes it possible to schedule the operations selected using certain automatic calculation functions for the availability of the different rooms.

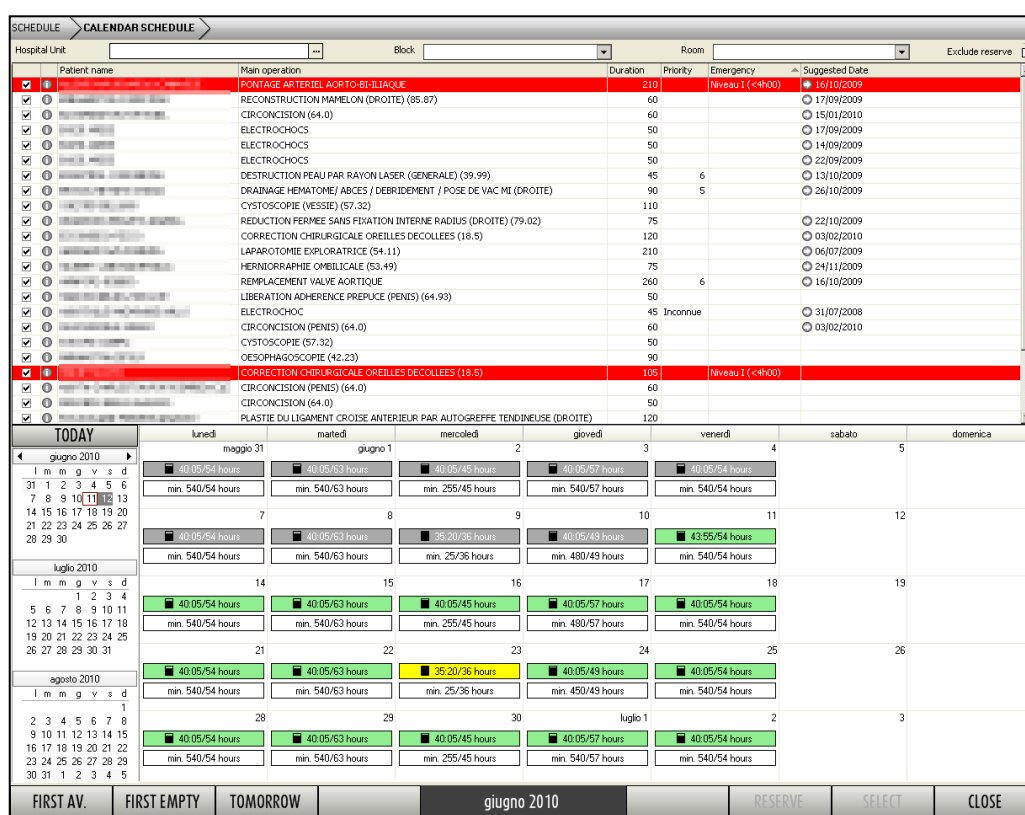


Fig 227 – Calendar Schedule

### 8.7.1 How to access the page

The calendar schedule page can be accessed from three different pages. These are:

- 1) the “Operation List” page;
- 2) the “Operation Record” page;
- 3) the “Scheduling” page.

#### 8.7.1.1 Access from the “Operation List” page

On the “Operation List” page (Fig 44, paragraph 4),

- select the operations to schedule.
- Click the **Change** button on the command bar (Fig 228 A).

The menu shown in Fig 228 will open.

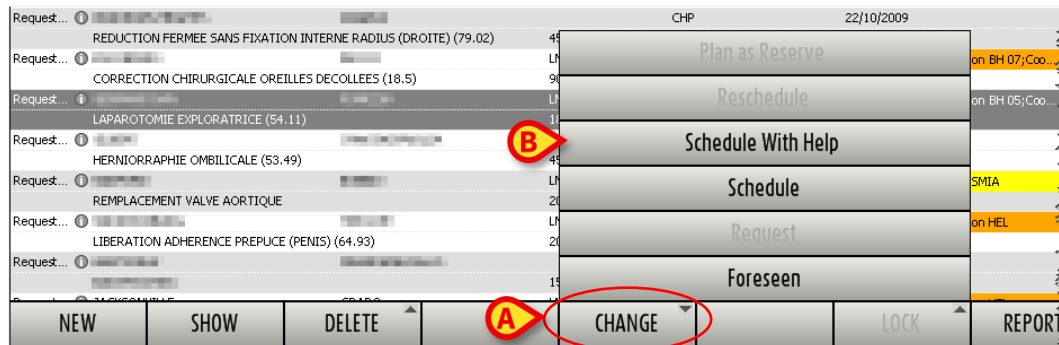


Fig 228

- Click the **Schedule with help** option (Fig 228 B).

The “Calendar schedule” screen will open (Fig 230). All and only the selected operations will be shown on this screen.



*To select more than one operation at a time, you must click the lines corresponding to the operations to be selected, keeping the CTRL key on the keyboard pressed.*

### 8.7.1.2 Access from the “Operation Record” page

- On the “Operation Record” page (Fig 49, paragraph 5).
- Click the **Edit** button on the command bar (Fig 229 A)

The screen turns to “edit” mode.

- Click the **Change** button on the command bar (Fig 229 B).

The menu shown in Fig 229 opens.

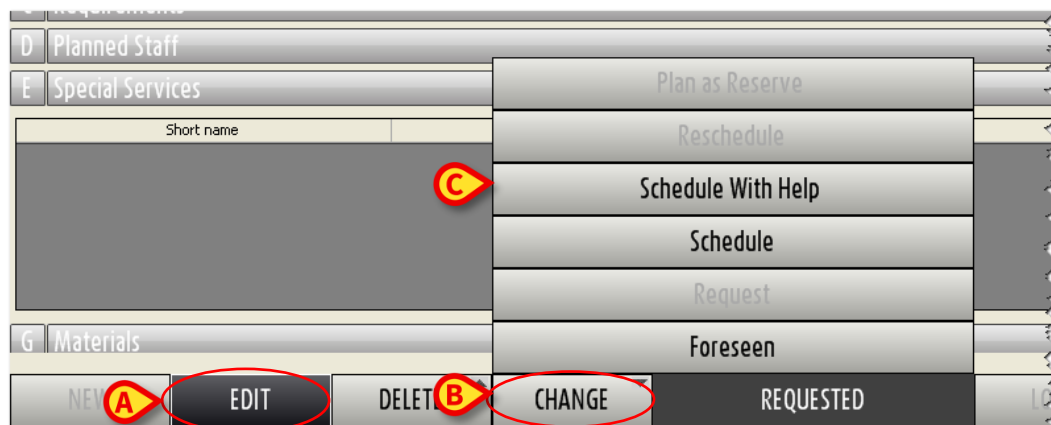


Fig 229

- Click the “Schedule with help” option (Fig 229 C).

This accesses the “Schedule with help” page (Fig 230). Only the operation referred to by the initial “Operation Record” page will be shown on this page.

### 8.7.1.3 Access from the “Scheduling” page

On the “Scheduling” page (Fig 169, paragraph 8).

- Click the **Sched. Help** button on the command bar.

This accesses the “Schedule with help” page (Fig 230). All the operations listed on the initial “Scheduling” page in the “Operation to schedule” area will be shown on this page.



## 8.7.2 Page description

The “Schedule with Help” page is made up of 5 areas.

- 1) The “Hospital Unit”, “Block” and “Room” selection filters (Fig 230 A).
- 2) The month selection area (Fig 230 B).
- 3) The area containing the list of operations (Fig 230 C).
- 4) The central area, the calendar of the month selected (Fig 230 D).
- 5) The command bar (Fig 230 E).

The screenshot shows the 'Calendar Schedule' window. At the top, there are filters for 'Hospital Unit', 'Block', and 'Room'. Below these is a table of operations with columns for Patient name, Main operation, Duration, Priority, Emergency, and Suggested Date. A yellow box labeled 'C Operations list' points to this table. Below the table is a calendar view for June 2010, with days of the week and dates. A yellow box labeled 'D Calendar' points to this view. To the left of the calendar is a month selection area with buttons for 'TODAY', 'junio 2010', and 'agosto 2010'. A yellow box labeled 'B Month selection' points to this area. At the bottom of the window is a command bar with buttons for 'FIRST AV.', 'FIRST EMPTY', 'TOMORROW', 'giugno 2010', 'RESERVE', 'SELECT', and 'CLOSE'. A yellow box labeled 'E Command bar' points to this bar. A yellow box labeled 'A Filters' points to the top filter section.

Fig 230

The characteristics and operation of areas A (selection filters) and B (month selection) are the same as those described in paragraph 8.6 for the “Calendar” page. See this paragraph for their description.

## 8.7.2.1 The list of operations
























	Patient name	Main operation	Duration	Priority	Emergency	Suggested Date
<input checked="" type="checkbox"/>		PONTAGE ARTERIEL AORTO-BI-ILIAQUE	210		Niveau I (<4h00)	16/10/2009
<input checked="" type="checkbox"/>		RECONSTRUCTION MAMELON (DROITE) (85.87)	60			17/09/2009
<input checked="" type="checkbox"/>		CIRCUNCISION (64.0)	60			15/01/2010
<input checked="" type="checkbox"/>		DESTRUCTION PEAU PAR RAYON LASER (GENERALE) (39.99)	45	6		13/10/2009
<input checked="" type="checkbox"/>		DRAINAGE HEMATOME / ABCE / DEBRIDEMENT / POSE DE VAC MI (DROITE)	90	5		26/10/2009
<input checked="" type="checkbox"/>		CYSTOSCOPIE (VESSIE) (57.32)	110			
<input checked="" type="checkbox"/>		REDUCTION FERMEE SANS FIXATION INTERNE RADIUS (DROITE) (79.02)	75			22/10/2009
<input checked="" type="checkbox"/>		CORRECTION CHIRURGICALE OREILLES DECOLLEES (18.5)	120			03/02/2010
<input checked="" type="checkbox"/>		LAPAROTOMIE EXPLORATRICE (54.11)	210			06/07/2009
<input checked="" type="checkbox"/>		HERNIORRAPHIE OMBILICALE (53.49)	75			24/11/2009
<input checked="" type="checkbox"/>		REMPLACEMENT VALVE AORTIQUE	260	6		16/10/2009
<input checked="" type="checkbox"/>		LIBERATION ADHERENCE PREPUCE (PENIS) (64.93)	50			
<input checked="" type="checkbox"/>		ELECTROCHOC	45	Inconnue		31/07/2008
<input checked="" type="checkbox"/>		CIRCUNCISION (PENIS) (64.0)	60			03/02/2010
<input checked="" type="checkbox"/>		CYSTOSCOPIE (57.32)	50			
<input checked="" type="checkbox"/>		OESOPHAGOSCOPIE (42.23)	90			
<input checked="" type="checkbox"/>		CORRECTION CHIRURGICALE OREILLES DECOLLEES (18.5)	105		Niveau I (<4h00)	
<input checked="" type="checkbox"/>		CIRCUNCISION (PENIS) (64.0)	60			
<input checked="" type="checkbox"/>		CIRCUNCISION (64.0)	50			
<input checked="" type="checkbox"/>		PLASTIE DU LIGAMENT CROISE ANTERIEUR PAR AUTOGREFFE TENDINEUSE (DROITE)	120			
<input checked="" type="checkbox"/>		Biopsie ganglion lymphatique (Examen, chir cervicale, thyroïde)	60			30/01/2009
<input checked="" type="checkbox"/>		EXCISION LESION EXOSTOSE FEMUR (DROITE) (77.65)	80			
<input checked="" type="checkbox"/>		CIRCUNCISION (64.0)	50			

Fig 231 – List of operations

The table shown contains the list of operations to be scheduled using the functions of the schedule with help.

Every line corresponds to an operation.

The columns contain, in this order:

- the selection boxes.

The schedule with help functions are active only for the operations selected. Therefore, you can choose the operations on the list for which you wish to use the schedule with help functions by selecting or deselecting the box corresponding to the operation.

- The information icon .

Click this icon to display a window summarizing the information available on the operation (Fig 232).

Main operation: ABLATION MATERIEL D'OSTEOSYNTHESE (AMO) MALLEOLAIRE EXTERNE  
 ABLATION MATERIEL D'OSTEOSYNTHESE (AMO) MALLEOLAIRE INTERNE

Patient Code: : : : :  
 Requesting hospital unit: OTR  
 Hospitalization unit: OTR  
 Planned date: 02/11/2007 07.20 (60 min.)  
 Planned duration: 60  
 Room-In: 02/11/2007 07.20 (117 min.)  
 Final Duration: 117  
 Transmissible diseases:  
 Infections:  
 Allergies:  
 Standard requirements:  
 • TP, PTT, FSS; Consultation Pré-Chirurgicale; Convocation CCA; Autres Examens; ECG; NA, K, CREAT, GLY  
 Standard devices:  
 Proposed anesthesia:  
 • Anesthésie loco-régionale;  
 Position on table:  
 • DD;  
 Not before:  
 Suggested: 02/11/2007

SELECT


Fig 232 – Operation data




































Click the **Select** button in the window to access the “Operation Record” page relating to the operation clicked (Fig 49).

- The name of the patient to be operated on.
- The operation.
- The scheduled duration.
- The degree of priority of the operation.

The operations scheduled as “Emergencies” are highlighted red.

- The date suggested for the operation (if indicated on the “Operation Record” page - Fig 49).

Click the  icon alongside the suggested date to highlight the corresponding day in blue on the calendar (Fig 233 A). In this way you can immediately check the availability of time on the day suggested for a specific operation.

lunedì	martedì	mercoledì	giovedì	venerdì	sabato	domenica
giugno 25	26	27	28	29	30	luglio 1
 28:20/165:59 O...	 40:18/147:59 O...	 16:45/147:59 O...	 16:45/123:59 O...	 25:25/165:59 O...	 16:45/47:58 Ore	 16:45/47:58 Ore
min. 1439/165:59...	min. 960/147:59 O...	min. 1439/147:59...	min. 1439/123:59...	min. 1439/165:59...	min. 1439/47:58 O...	min. 1439/47:58 Ore
2	3	4	5	6	7	8
 18:50/165:59 O...	 38:36/147:59 O...	 17:30/147:59 O...	 39:40/123:59 O...	 16:45/165:59 O...	 16:45/47:58 Ore	 16:45/47:58 Ore
min. 1439/165:59...	min. 1439/147:59...	min. 1439/147:59...	min. 1439/123:59...	min. 1439/165:59...	min. 1439/47:58 O...	min. 1439/47:58 Ore
9	10	11	12	13	14	15
 16:45/165:59 O...	 16:45/147:59 O...	 16:45/147:59 O...	 16:45/123:59 O...	 16:45/165:59 O...	 16:45/47:58 Ore	 16:45/47:58 Ore
min. 1439/165:59...	min. 1439/147:59...	min. 1439/147:59...	min. 1439/123:59...	min. 974/165:59 O...	min. 1439/47:58 O...	min. 1439/47:58 Ore
16	17	18	19	20	21	22
 16:45/165:59 O...	 16:45/147:59 O...	 16:45/147:59 O...	 16:45/123:59 O...	 16:45/165:59 O...	 16:45/47:58 Ore	 16:45/47:58 Ore
min. 1439/165:59...	min. 1439/147:59...	min. 1439/147:59...	min. 1439/123:59...	min. 1439/165:59...	min. 1439/47:58 O...	min. 1439/47:58 Ore
23	24	25	26	27	28	29
 16:45/165:59 O...	 16:45/147:59 O...	 16:45/147:59 O...	 16:45/123:59 O...	 16:45/165:59 O...	 16:45/47:58 Ore	 16:45/47:58 Ore
min. 1439/165:59...	min. 1439/147:59...	min. 1439/147:59...	min. 1439/123:59...	min. 1439/165:59...	min. 1439/47:58 O...	min. 1439/47:58 Ore

**Fig 233 – Suggested date**

### 8.7.2.2 The calendar of the selected month

The central part of the page shows, in a calendar form, the information on the availability of time in the operating rooms managed by the connected user (Fig 234).




































lunedì	martedì	mercoledì	giovedì	venerdì	sabato	domenica
giugno 25	26	27	28	29	30	luglio 1
 47:10/165:59 O...	 59:08/147:59 O...	 35:35/147:59 O...	 35:35/123:59 O...	 44:15/165:59 O...	 35:35/47:58 Ore	 35:35/47:58 Ore
min. 960/165:59 O...	min. 730/147:59 O...	min. 960/147:59 O...	min. 1439/123:59...	min. 1439/165:59...	min. 734/47:58 Ore	min. 734/47:58 Ore
2	3	4	5	6	7	8
 37:40/165:59 O...	 57:26/147:59 O...	 36:20/147:59 O...	 58:30/123:59 O...	 35:35/165:59 O...	 35:35/47:58 Ore	 35:35/47:58 Ore
min. 1439/165:59...	min. 650/147:59 O...	min. 1439/147:59...	min. 1439/123:59...	min. 1439/165:59...	min. 734/47:58 Ore	min. 734/47:58 Ore
9	10	11	12	13	14	15
 35:35/165:59 O...	 35:35/147:59 O...	 35:35/147:59 O...	 35:35/123:59 O...	 35:35/165:59 O...	 35:35/47:58 Ore	 35:35/47:58 Ore
min. 960/165:59 O...	min. 960/147:59 O...	min. 960/147:59 O...	min. 1439/123:59...	min. 960/165:59 O...	min. 734/47:58 Ore	min. 734/47:58 Ore
16	17	18	19	20	21	22
 35:35/165:59 O...	 35:35/147:59 O...	 35:35/147:59 O...	 35:35/123:59 O...	 35:35/165:59 O...	 35:35/47:58 Ore	 35:35/47:58 Ore
min. 960/165:59 O...	min. 1439/147:59...	min. 1439/147:59...	min. 960/123:59 O...	min. 960/165:59 O...	min. 734/47:58 Ore	min. 734/47:58 Ore
23	24	25	26	27	28	29
 35:35/165:59 O...	 35:35/147:59 O...	 35:35/147:59 O...	 35:35/123:59 O...	 35:35/165:59 O...	 35:35/47:58 Ore	 35:35/47:58 Ore
min. 1439/165:59...	min. 1439/147:59...	min. 734/147:59 O...	min. 960/123:59 O...	min. 1439/165:59...	min. 734/47:58 Ore	min. 734/47:58 Ore

Fig 234 – Month selected

Every box corresponds to an operating day (Fig 235).

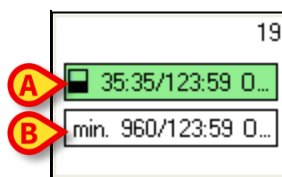









Fig 235 – Operating day

The upper box (Fig 235 B) indicates how much time, of the total time available that day, is already reserved for operations.

The  icon indicates that, for the day in question, the time occupied by operations is less than 50% of the total time.

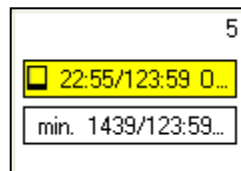
6 possible icons of this type may occupy the same position.

-  means that the total time is all available.
-  means that the time occupied by operations is less than 25% of the total time.
-  means that the time occupied by operations is less than 50% of the total time.
-  means that the time occupied by operations is less than 75% of the total time.
-  means that the time occupied by operations is less than 90% of the total time.
-  means that the time is all occupied by operations.

The same information is contained in detail in text form alongside the icon. In the example shown in Fig 235, the time available is 35 hours and 35 minutes out of a total 123 hours and 59 minutes.

The green color of the box means that every operation selected on the list of operations (Fig 231) can be planned on that day.

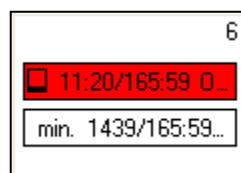
The box in question can appear in yellow (Fig 236).



**Fig 236**

The color yellow means that at least one of the operations (but not all of the operations) selected on the list of operations (Fig 231) can be planned on that day.

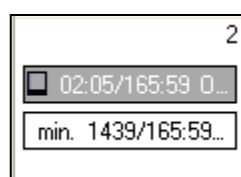
The box can appear in red (Fig 237).



**Fig 237**

The color red means that none of the operations selected on the list of operations (Fig 231) can be planned on that day.

When the box appears in gray, the day in question is in the past. Therefore it is not possible to perform any operation on that day (Fig 238).



**Fig 238**

The lower box (Fig 235 **B**) indicates the longest range of time available in all the rooms managed by the user connected. This range is indicated in minutes to enable immediate comparison with the scheduled duration of the different operations (also indicated in minutes). The example shown in Fig 235 **B** indicates that the longest range of time that day is 960 minutes. Any operation with a scheduled duration of less than 960 minutes can therefore be scheduled on that day.

Click one of the operations selected on the list of operations to obtain additional information.

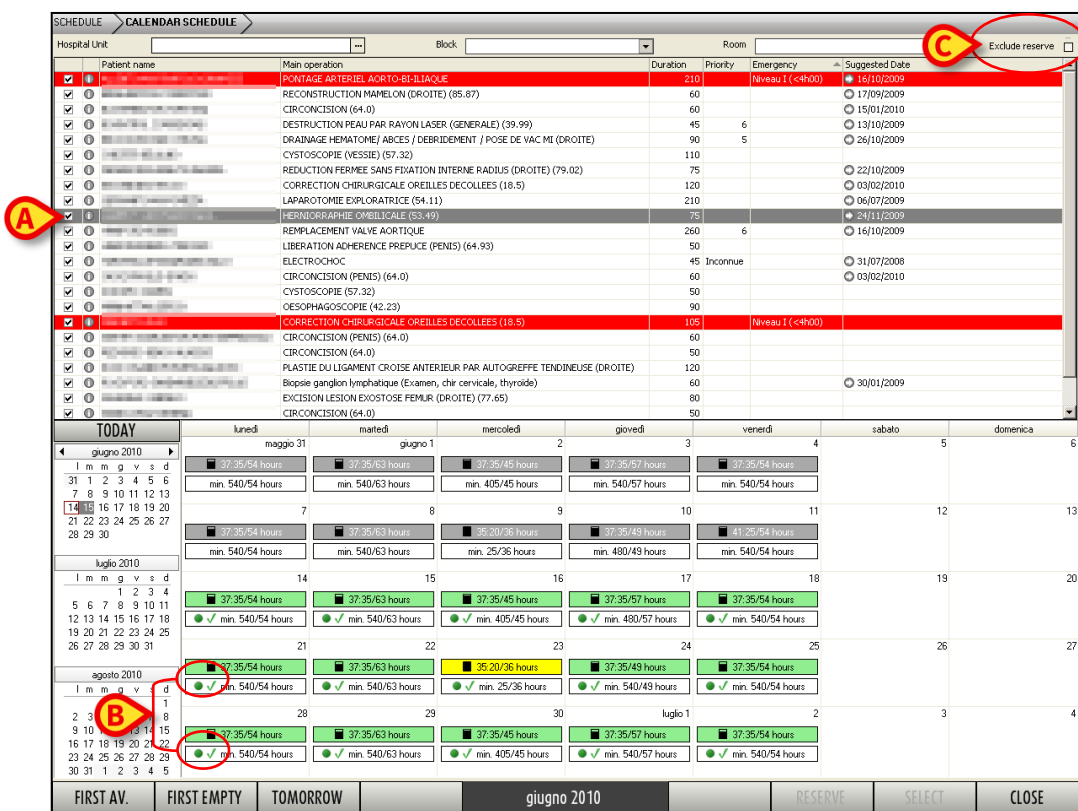


Fig 239 – Selecting an operation

The operation clicked appears highlighted (Fig 239 A) and new icons appear inside the boxes indicating the various days (Fig 239 B, Fig 240).

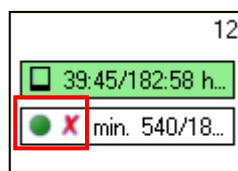


Fig 240

The ● icon means that the operation highlighted can be planned on that day.

The ● icon means that the operation highlighted cannot be planned on that day.

The ✓ icon means that there has been a crosscheck with other IT systems and that there is no overlap of reservations for that patient on that day (the patient could, for example, have arranged a test or check-up for the same day).

The ✗ icon may mean two things: 1) that there has been no crosscheck with other IT systems and that there is no data regarding possible overlapped reservations; 2) that there is an overlap of reservations for that patient on that day.

Click the lower portion of every box (Fig 235 B) to open a window containing detailed information on the situation of every room in the day corresponding to the box.

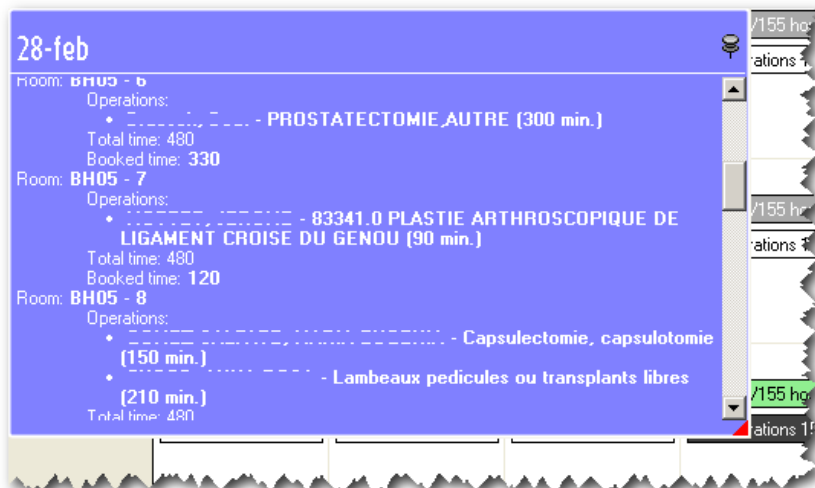


Fig 241 – Day Details

The example shown in Fig 241 informs us, for example, that room 7 of block BH05 has 1 operations scheduled (you can read the patient's name, the type of operation and the duration), that the total time available in this room is 480 minutes and that the time occupied by operations is 120 minutes.

Moving downwards, you will find information on all the rooms managed by the user connected. Once again in Fig 241 you can see, for example, that two operations are scheduled in room 8 of block BH05, that the total time available in this room is 480 minutes and that the time occupied by operations is 360 minutes.

The “exclude reserves” checkbox indicated in Fig 239 C can be used to exclude the room, block or generic reserves from the calculation of available hours and minutes (see paragraph 8.5.5 for an explanation of the concept of “reserve”). By default, when the system calculates the times, it considers reserves as operations to be calculated. Select the “exclude reserves” checkbox to exclude the reserves from the time calculation. A room reserve, for example, with a scheduled duration of 100 minutes, will implicate a subtraction of 100 minutes from the time available in the room in which it has been scheduled. Select the “exclude reserves” checkbox to prevent subtraction of these 100 minutes.

To select one of the calendar days, simply click the corresponding box. The day selected appears highlighted in dark gray. Day 28 is selected in Fig 242.

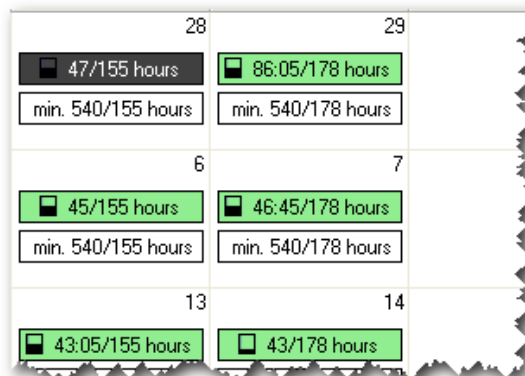


Fig 242 – Day Selected

### 8.7.2.3 Example: how to schedule an operation

---



*Below there is an example of one of the possible ways of using the schedule with help page. To keep things simple we have selected just one operation. The procedure however is the same for multiple selections.*

To plan an operation using the “Schedule with help” functionalities

- Access the “Schedule with help” window (Fig 227 – Calendar Schedule) so that the operation appears in the list of operations - Fig 231 - (see paragraph 8.7.1 for instructions).
- Click inside the corresponding checkbox to select the operation.

The boxes indicating the various days will be colored depending on whether or not it is possible to schedule the operation (green if it fits, red if it doesn't - Fig 234).

- Select the most suitable of the green boxes.
- Click the box to select it.

The box will be highlighted (Fig 242).

- Click the **Select** button on the command bar.

The scheduling page opens (Fig 169) for the day selected and with only the operation selected in the “Operations to schedule” area.

- Enter the operation in the scheduling grid according to the procedure described in paragraph 8.5.



### 8.7.3 The command bar of the “Calendar schedule” screen

The control bar of the schedule with help page contains various button to perform different operations (Fig 243).

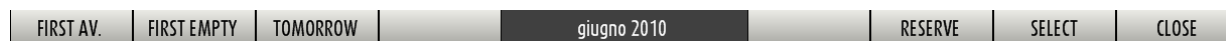


Fig 243

The functions of the different buttons are briefly listed in this paragraph and, when necessary, described in detail in the paragraphs indicated.



This button makes it possible to automatically select the first day available for the scheduling of the operations selected. When you press the button, the system automatically selects the first day on which it is possible to enter a specific operation. See paragraph 8.7.3.1 for the detailed procedure.



This button makes it possible to automatically select the first completely free day. When you press the button, the system selects the first day with no scheduled operations. See paragraph 8.7.3.2 for the detailed procedure.



This button makes it possible to automatically select the day following the current day.



The box in the middle of the command bar shows the name of the month currently displayed.



This button makes it possible to enter the operations selected in the schedule of any operating day as a generic reserve. See paragraph 8.7.3.3 for the detailed procedure.



This button makes it possible to access the scheduling page related to the day selected (Fig 169)



This button closes the “Calendar schedule” screen.

#### 8.7.3.1 First available day

The **First Av.** button (Fig 244) makes it possible to automatically select the first day available for the scheduling of the operations selected. When you press the button, the system automatically selects the first day on which it is possible to enter a specific operation.



Fig 244 - “Calendar schedule” command bar

To use this function, you must

- click the box corresponding to the operation (or operations) to be scheduled (Fig 245).

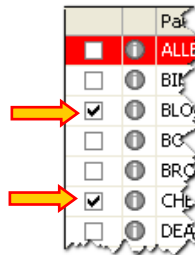


Fig 245

- Click the **First Av.** button on the command bar (Fig 245 A).

The first day containing at least one empty slot is highlighted on the calendar.

- Click the **Select** button on the command bar (Fig 245 B).

The scheduling page for the day chosen and the operation selected opens (Fig 169).

### 8.7.3.2 First empty day

The **First Empty** button (Fig 246 A) makes it possible to automatically select the first completely free day. When you press the button, the system selects the first day with no scheduled operations.

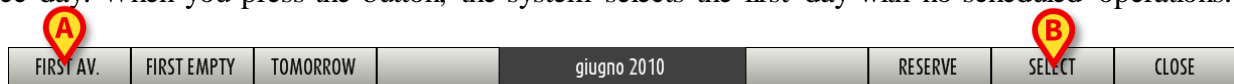


Fig 246 - "Calendar schedule" command bar

To use this function, you must

- click the box corresponding to the operation (or operations) to be scheduled (Fig 247).

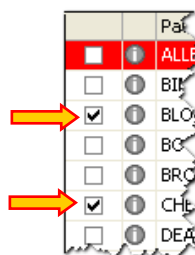


Fig 247

- Click the **First Empty** button on the command bar (Fig 246 A).

The first completely free day is highlighted on the calendar.

- Click the **Select** button on the command bar (Fig 246 B).

The scheduling page for the day chosen and the operation selected opens (Fig 169)

### 8.7.3.3 Create a generic reserve

The **Reserve** button (Fig 248 A) makes it possible to enter the operations selected in the schedule of any operating day as a generic reserve (see paragraph 8.5.5 for an explanation of the concept of “reserve”).

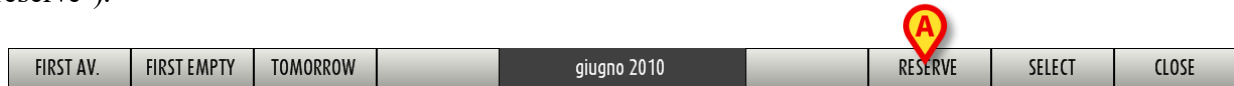


Fig 248 - “Calendar schedule” command bar

To use this function, you must

- click the box corresponding to the operation (or operations) to be scheduled as reserve (Fig 249).

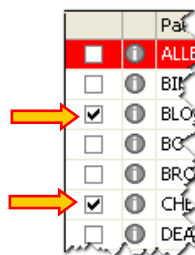


Fig 249

- Click the box corresponding to the day on which you wish to enter the reserve.

The box appears highlighted (Fig 250).

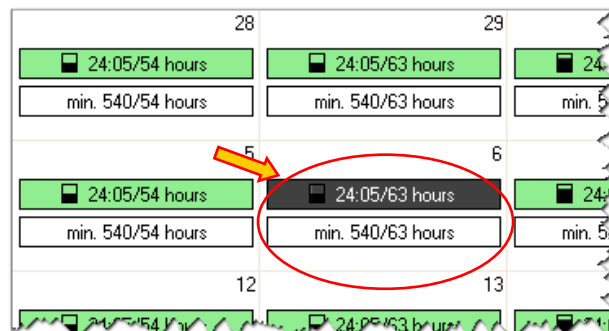


Fig 250

- Click the **Reserve** button (Fig 248).

A window requesting confirmation of the operation opens (Fig 251).



Fig 251

- Click **Yes** to schedule the operation as a reserve.

The operation selected disappears from the list of operations to schedule and appears as a generic reserve on the day chosen.



*The functions performed by the **Reserve** and **Select** buttons can also be performed by right clicking. After selecting an operation, right click the box corresponding to the day required to open a window containing the two options, “Reserve” and “Select”(Fig 252).*

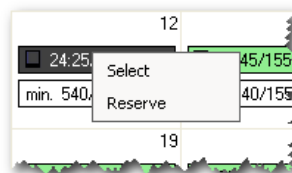



Fig 252

## 9 Room staff management

---

The “Staff management” module makes it possible to manage the planned staff of the operations. The module implements scheduling functionalities that are specific for the staff management. To access this module

- Click the corresponding icon -  - on the lateral bar.

The “Staff Management” screen will open (Fig 253).



*Staff can be also scheduled, with different procedures, on the “Operation Record” screen. The relating procedures are described in paragraph 7.4.*

*A “System Option” has been defined in order to avoid conflicts between the staff planned on the “Operation Record” and the staff planned on the “Staff management” module (described in this paragraph).*

*This “System Option”, named **DisablePlannedStaffEditingOnOperationRecord**, if activated, enables staff editing on the “Operation Record” only if the operation is either in “Foreseen” or “Requested” state. The staff of the planned operations (“Planned” state) is only managed on the “Staff management” module.*

*To activate the system option set its Value=Yes.*



*If the operation data are changed while the staff is being edited, after the Update the system informs the user with a specific message. This message makes it possible to print a report containing the list of all the operations whose data changed.*

*This message is generated only once. It will not later be possible to print the list again.*

*The information that, if edited, triggers the message is: Operation status, Planned date, Planned time, Planned duration, Main operation, Planned Room, Planned Block.*

## 9.1 Staff Management

The “Staff Management” screen (Fig 253) makes it possible to manage the operating staff for the planned operations.

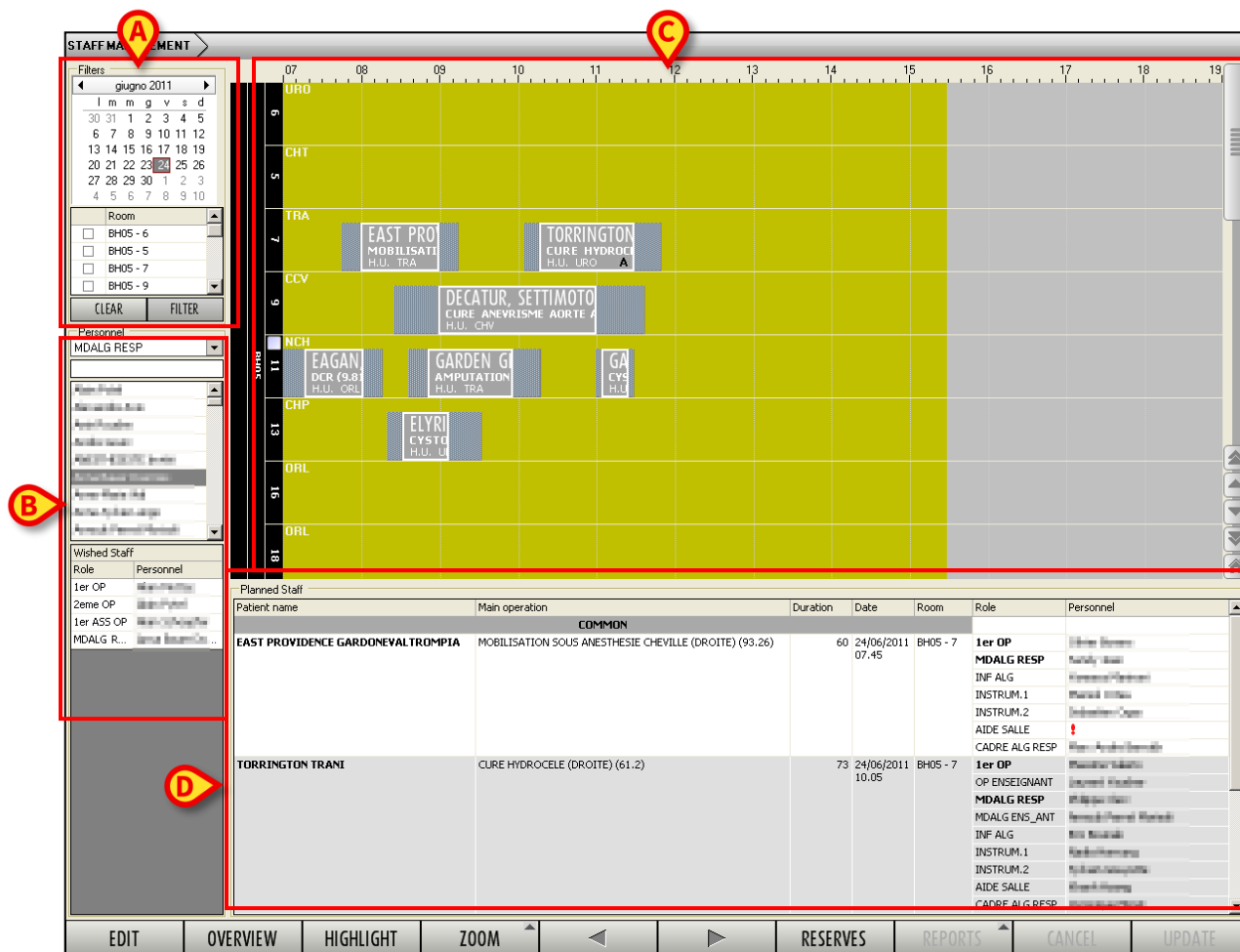


Fig 253

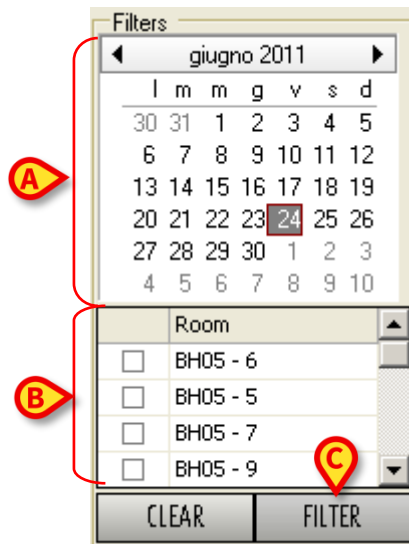
The screen is formed of four areas:

- The search filters area (Fig 253 A).
- The personnel editing tools panel (Fig 253 B).
- The area displaying either the operations plan or the reserves list (Fig 253 C).
- The area named “Planned Staff area” dedicated to show the planned staff (Fig 253 D).

These four areas are described in the following paragraphs.

### 9.1.1 Search filters

The search filters (Fig 253 A, Fig 254) make it possible to decide which operations are displayed in the “Planned operations” area (described in paragraph 9.1.3) by selecting the operation date and room.



**Fig 254**

To display the operations planned for a specific date

- Click the cell corresponding to the wanted day on the calendar indicated in Fig 254 A.
- Click the **Filter** button (Fig 254 C).

The operations planned for the selected day will be displayed.

Multiple days selection is possible (maximum 5 days) by keeping the mouse button clicked while selecting the corresponding cells. The day after present day is selected by default.

To display the operations planned for a specific room

- Select the checkbox corresponding to the room in the area indicated in Fig 254 B.
- Click the **Filter** button (Fig 254 C).

Only the operations planned for the selected rooms are this way displayed. Multiple room selection is possible.

### 9.1.2 Personnel editing tools

The personnel editing tools, shown in Fig 255, make it possible to search and select the staff members in order to associate (or dissociate) them to one or more operations. The room staff can be here defined as a team and later associated (the whole staff) to one or more operations.

The screenshot shows a software interface for managing personnel. It is divided into two main sections: 'Personnel' and 'Wished Staff'.

**Personnel Section:**

- Role filter (A):** A dropdown menu currently showing '1er OP'.
- Name filter (B):** An empty text input field.
- Personnel list (C):** A scrollable list of names: Ariel ST. CLAIR SHORES, Armando VALDOSTA, Arnaud LEXINGTON-FAY..., Arnaud ST. CLAIR SHORES, Aron PORT ORANGE, Arthur CHICOPEE, Arthur MUNDELEIN, Assia REDDING, and Astrid MUSKEGON.

**Wished Staff Section (D):**

Role	Personnel
1er OP	Alain CARLSBAD
2eme OP	Alain SANTA R...
STAG OP	Nicolas JERSEY
INF ALG	Xavier PITTSB ...
INSTRUM.1	Jocelyne MIDL ...

**Fig 255**

The panel shown in the figure is formed of four tools.

- **Role filter** (Fig 255 A) – this field makes it possible to specify the wanted role. Only the staff members enabled to cover that role are displayed in the personnel table (Fig 255 C).
- **Name filter** (Fig 255 B) - this field makes it possible to specify the name of the wanted staff member. After three characters are typed, the list displays only the members whose names match the inserted characters.
- **Personnel table** (Fig 255 C) – This table lists on one column the staff members according to what was specified in the fields described above (name and role).
- **Wished Staff** (Fig 255 D) – This grid must be filled by the user with the names of the staff members required for an operation. The “Wished staff” area makes it possible to define the whole staff for one or more operations as an “operating team” that can be later associated to the specific operations. To add a staff member to the “Wished staff”, drag the name of the person to be added from the personnel table and drop it on the “Wished staff” area. See paragraph 9.2.2 for the detailed procedure.



### 9.1.3 “Planned operations” area

The area shown in Fig 253 C and Fig 256 provides a view of the operating plan. The plan has the same structure and features of the “Operating Plan” described in chapter 8. See this chapter for a detailed description.

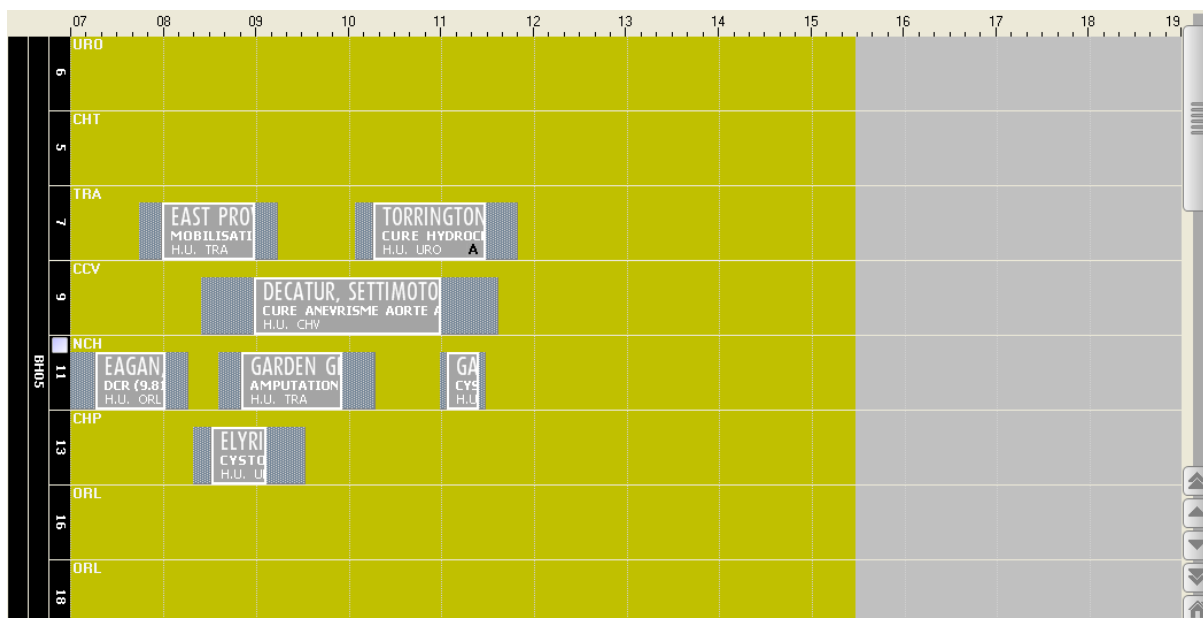


Fig 256

Scheduling functionalities are here disabled. The only possible action is the operation selection.

To select an operation

- click the **Edit** button on the command bar.
- Click the rectangles corresponding to the operations to be selected.

The selected operation appears white with black borders (see Fig 257).

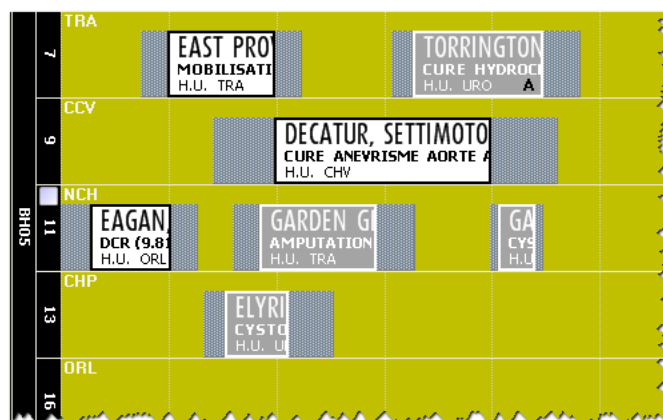


Fig 257

The selection of one or more operations displays the details of the selected operations in the “Planned staff” area (Fig 253 D, Fig 259). Most important, the details relating to the planned staff

of the selected operations are displayed in the “Planned Staff” area. By default, if no operation is selected, the details of all the planned operations are displayed in the “Planned staff” area.

### 9.1.3.1 “Reserves” display

The “Planned operations” area (Fig 256) is also used to display the list of “Reserves” (see paragraph 8.5.5 for an explanation of the “Reserve” concept).

To display the “Reserves” list

- Click the **Reserves** button on the command bar (Fig 258 A).

The list of “Reserves” will be displayed (Fig 258 B).

**STAFF MANAGEMENT**

**Filters**

guigno 2011

Room

☐ BH05 - 6

☐ BH05 - 5

☐ BH05 - 7

☐ BH05 - 9

**Personnel**

Ter OP

Alain CARLSBAD

Alain FORT PIERCE

Alain JEFFERSON

Alain KISSIMMEE

Alain ROMEOVILLE

Alain SANTA ROSA

Alain STREAMWOOD

Alban BAKERSFIELD

Alda LEOMINSTER

**Wished Staff**

Role Personnel

**Reserves**

Patient name	Main o...	Duration	Priority	Emerg...	Hospit...	Operat...	Room	Date
GREENWOOD, IRSINA	CESAR...	52		Niveau...	CHUV\...			24/06/2011
EDINBURG, PORTOGR...	AUTRE...	210			CHUV\...	BH05		24/06/2011
GEORGETOWN, ROCCA...	BIOPSI...	60			CHUV\...	BH05	13	24/06/2011
COPPELL, CASTELGAN...	AUTRE...	45	6		CHUV\...	BH05	11	24/06/2011

**Planned Staff**

Patient name	Main operation	Duration	Date	Room	Role	Personnel
GREENWOOD IRSINA	CESARIENNE ISTHMIQUE BASSE TRANSVERSE	52	24/06/2011		MDALG RESP	↑
					1er OP	Martine EULESS
EDINBURG PORTOGRUARO	AUTRE INTERVENTION HORS LISTE (CAR)	210	24/06/2011	BH05	MDALG RESP	↑
					1er OP	Etienne SANTA ROSA
COPPELL CASTELGANDOLFO	AUTRE INTERVENTION HORS LISTE RAD	45	24/06/2011	BH05 - 11	MDALG RESP	↑
					1er OP	Francois ROCKLIN
GEORGETOWN ROCCADASPIDE	BIOPSIE CALCAEUM (DROITE) (77.48)	60	24/06/2011	BH05 - 13	MDALG RESP	↑
					1er OP	Olivier SAN MATEO
					2eme OP	Alec SOUTH GATE
					MDALG RESP	↑
					INSTRUM.1	Nisanda Yvette GRAND JUNCTION
					INSTRUM.2	Lella LAKE WORTH
					AIDE SALLE	Aurora GRAND PRAIRIE
					CADRE ALG RESP	Laurent KISSIMMEE

**Command Bar:** EDIT | OVERVIEW | HIGHLIGHT | ZOOM | **RESERVES** | REPORTS | CANCEL | UPDATE

Fig 258

Each row in the “Reserves” list corresponds to an operation. For each operation the following information is provided:

- Patient name
- Operation
- Planned duration
- Priority
- Emergency level
- Requesting Hospital Unit

- Planned block
- Planned room
- Planned date

To select a “Reserve”

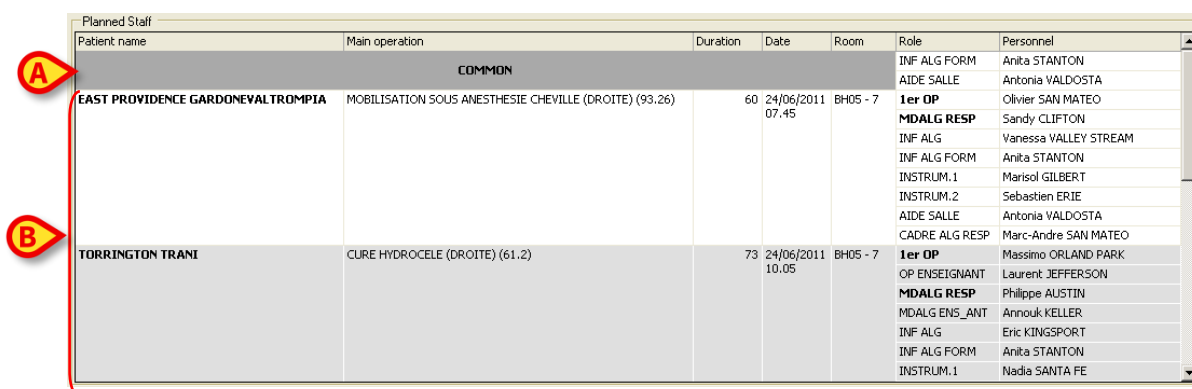
- click the **Edit** button on the command bar.
- Click the row corresponding to the “Reserve” to be selected.

To select multiple “Reserves”, keep the “Ctrl” button on the workstation keyboard pressed while clicking on the different rows.

The selection of one or more “Reserves” displays the details of the selected operations in the “Planned staff” area (Fig 253 D, Fig 259). Most important, the details relating to the planned staff of the selected operations are displayed in the “Planned Staff” area. By default, if no “Reserve” is selected, the details of all the “Reserves” are displayed in the “Planned staff” area.

### 9.1.4 “Planned staff” area

The area shown in Fig 259 and Fig 253 D displays, alongside the operation’s main data, detailed information on the staff planned for the operations selected in the “Planned operations” area (Fig 256). If no operation is selected in the “Planned operations” area, the data relating to all the planned operations are displayed.



Patient name	Main operation	Duration	Date	Room	Role	Personnel
<b>COMMON</b>						
EAST PROVIDENCE GARDONEVAL TROMPIA	MOBILISATION SOUS ANESTHESIE CHEVILLE (DROITE) (93.26)	60	24/06/2011 07.45	BH05 - 7	INF ALG FORM	Anita STANTON
					AIDE SALLE	Antonia VALDOSTA
					1er OP	Olivier SAN MATEO
					MDALG RESP	Sandy CLIFTON
					INF ALG	Vanessa VALLEY STREAM
					INF ALG FORM	Anita STANTON
					INSTRUM.1	Marisol GILBERT
					INSTRUM.2	Sebastien ERIE
					AIDE SALLE	Antonia VALDOSTA
					CADRE ALG RESP	Marc-Andre SAN MATEO
TORRINGTON TRANI	CURE HYDROCELE (DROITE) (61.2)	73	24/06/2011 10.05	BH05 - 7	1er OP	Massimo ORLAND PARK
					OP ENSEIGNANT	Laurent JEFFERSON
					MDALG RESP	Philippe AUSTIN
					MDALG ENS_ANT	Annouk KELLER
					INF ALG	Eric KINGSPORT
					INF ALG FORM	Anita STANTON
					INSTRUM.1	Nadia SANTA FE

Fig 259

The operations are displayed on a grid. The first row, indicated in Fig 259 A and enlarged in Fig 260, named “Common”, shows the (possible) staff members that are common to all the selected operations. The “Common” row is therefore displayed only if more than one operation is selected (or no operation is selected).





Patient name	Main operation	Duration	Date	Room	Role	Personnel
<b>COMMON</b>						
					INF ALG FORM	Anita STANTON
					AIDE SALLE	Antonia VALDOSTA


Fig 260

For each staff member the role and the name are indicated (Fig 260 A).



The  icon displayed instead of the name (no name) of the staff member indicates that every person enabled to cover the specified role is suitable for the operation.

The  icon displayed instead of the name of the staff member indicates that the specific role is required but no information was provided regarding the person's name.

If the  icon is displayed alongside the name it means that only that specific person is suitable for the operation.

The rows placed below the “Common” row (Fig 259 B, Fig 261) indicate the selected operations. The operation main data are here provided (patient name, planned operation, planned date and time, planned duration and planned room) alongside the detailed planned staff.

EAST PROVIDENCE GARDONEVALTROMPIA	MOBILISATION SOUS ANESTHESIE CHEVILLE (DROITE) (93.26)	60	24/06/2011 07.45	BH05 - 7	<b>1er OP</b> Olivier SAN MATEO <b>MDALG RESP</b> Sandy CLIFTON INF ALG Vanessa VALLEY STREAM INF ALG FORM Anita STANTON INSTRUM.1 Marisol GILBERT INSTRUM.2 Sebastien ERIE AIDE SALLE Antonia VALDOSTA CADRE ALG RESP Marc-Andre SAN MATEO
TORRINGTON TRANI	CURE HYDROCELE (DROITE) (61.2)	73	24/06/2011 10.05	BH05 - 7	<b>1er OP</b> Massimo ORLAND PARK OP ENSEIGNANT Laurent JEFFERSON <b>MDALG RESP</b> Philippe AUSTIN MDALG ENS_ANT Annouk KELLER INF ALG Eric KINGSPORT INF ALG FORM Anita STANTON INSTRUM.1 Nadia SANTA FE

Fig 261

The name and the role of each staff member are displayed (Fig 261 A). If an operation requires the same role more than once, various rows are displayed, referring to the same role.

### 9.1.5 Highlight functionality

The **Highlight** button on the command bar makes it possible to highlight the name of a selected staff member in the “Planned staff” area. A user can activate this functionality to immediately know for which operations a determined person is a staff member.

To activate the functionality

- Click the person's name either on the “Personnel” table or on the “Wished staff” area (Fig 262 A).
- Click the **Highlight** button (Fig 262 B).

The person's name will be highlighted in the “Planned staff” area (Fig 262 C).

Also, the corresponding operation boxes are highlighted on the “Plan” (Fig 262 D).

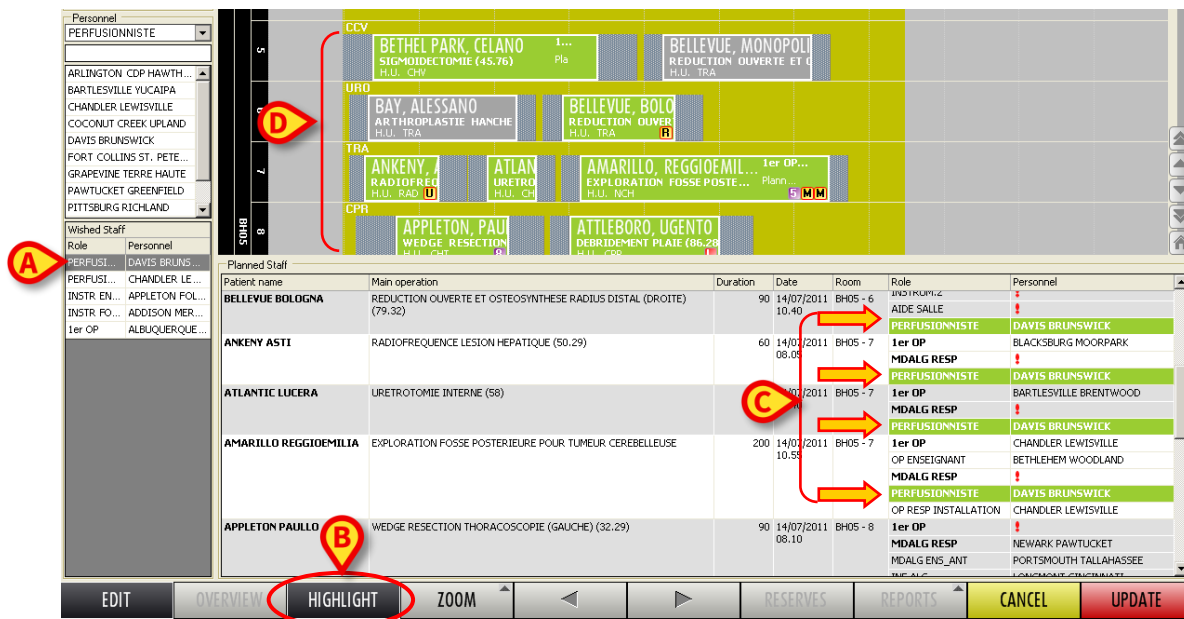


Fig 262

If the person's name was originally selected on the "Personnel" table, then it is highlighted not considering the role.

If it was originally selected on the "Wished Staff" area, then it is highlighted only in the operations for which it is associated with the specified role.

If the staff member name is clicked on the "Planned staff" area then the corresponding operation box is highlighted on the Plan.

You can also click the "Wished Staff" bar (Fig 263) to highlight all the wished staff members at once. In this case all their operations will be highlighted.

Wished Staff	
Personnel	Role
BARTLESVILL...	INF ALG
ANKENY BRO...	OP ENSEIG...
ALBUQUERQU...	1er ASS OP
ADDISON ME...	1er OP

Fig 263

The "Highlight" functionality can also be used as a filter for the "Staff overview" screen (see paragraph 9.3). I.e. if the "Highlight" functionality is activated and the **Overview** button is clicked, then the displayed "Staff overview" screen shows only the operations for which the selected staff members are scheduled.

## 9.2 Staff management procedures

This paragraph describes the procedures that can be performed on the “Staff management” module, making it possible to manage the operating staff.

### 9.2.1 Possible destinations indication

Basically, the staff management procedures are performed using the drag and drop functionality. That is, the various items on screen can be dragged from one position and dropped onto another for staff management purposes (described later in the specific paragraphs).

In order to facilitate the procedures, every time a “draggable” item is clicked, the system indicates the possible destinations with a blue border. See for instance Fig 264, in which the “Personnel Table” and “Wished Staff” area are bordered (on the right).

The figure displays two side-by-side screenshots of a software interface for staff management. Both screenshots show a 'Personnel' section with a dropdown menu set to '1er OP' and a list of names: Alain CARLSBAD, Alain FORT PIERCE, Alain JEFFERSON, Alain KISSIMMEE, Alain ROMEOVILLE, Alain SANTA ROSA, Alain STREAMWOOD, Alban BAKERSFIELD, and Alda LEOMINSTER. Below this is a 'Wished Staff' section containing a table with columns 'Role' and 'Personnel', and one row with '1er OP' and 'Emilie AUSTIN'. The interface is designed for drag-and-drop functionality, with blue borders indicating possible destinations for the dragged items.

Personnel	
1er OP	
Alain CARLSBAD	
Alain FORT PIERCE	
Alain JEFFERSON	
Alain KISSIMMEE	
Alain ROMEOVILLE	
Alain SANTA ROSA	
Alain STREAMWOOD	
Alban BAKERSFIELD	
Alda LEOMINSTER	

Wished Staff	
Role	Personnel
1er OP	Emilie AUSTIN

Fig 264

## 9.2.2 Adding a staff member to the “Wished staff”

The “Wished staff” area (Fig 265 B) makes it possible to define the whole staff for one or more operations as an “operating team” that can be later associated to the specific operations.

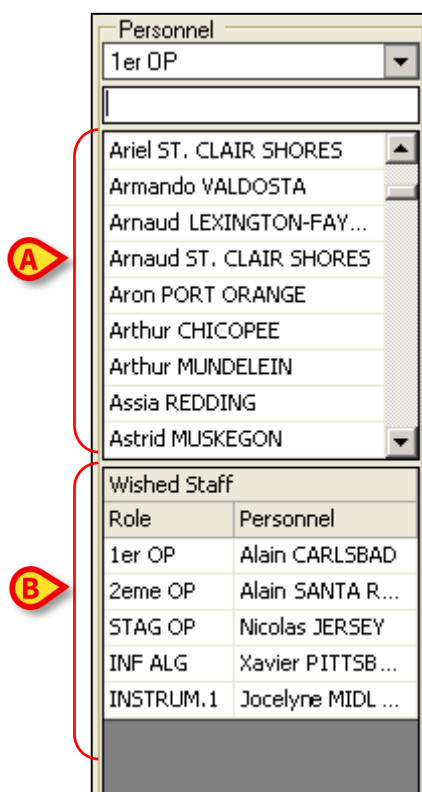


Fig 265

There are two ways to add a staff member to the “Wished staff”. In both cases, first of all, click the **Edit** button on the command bar, then

- 1) First way: click the row corresponding to the wanted member on the “Personnel table” (Fig 265 A).

Drag the row onto the “Wished Staff” area (drag from Fig 265 A and drop onto Fig 265 B).

- 2) Second way: right-click on the row corresponding to the wanted staff member on the “Personnel table”.

A contextual “Add to wished staff” option is displayed (Fig 266).

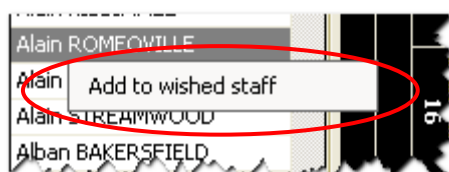


Fig 266

Click the “Add to wished staff” option.

In both cases the name of the staff member is displayed on the “Wished staff” area.

It is also possible to add a staff member by selecting him/her from the planned staff of an existing operation. Again, there are two ways to do that:

- 1) First way: click the row corresponding to the wanted staff member selecting it in the “Planned staff” area (Fig 267 A). Drag the item onto the “Wished staff” area (Fig 267 B).

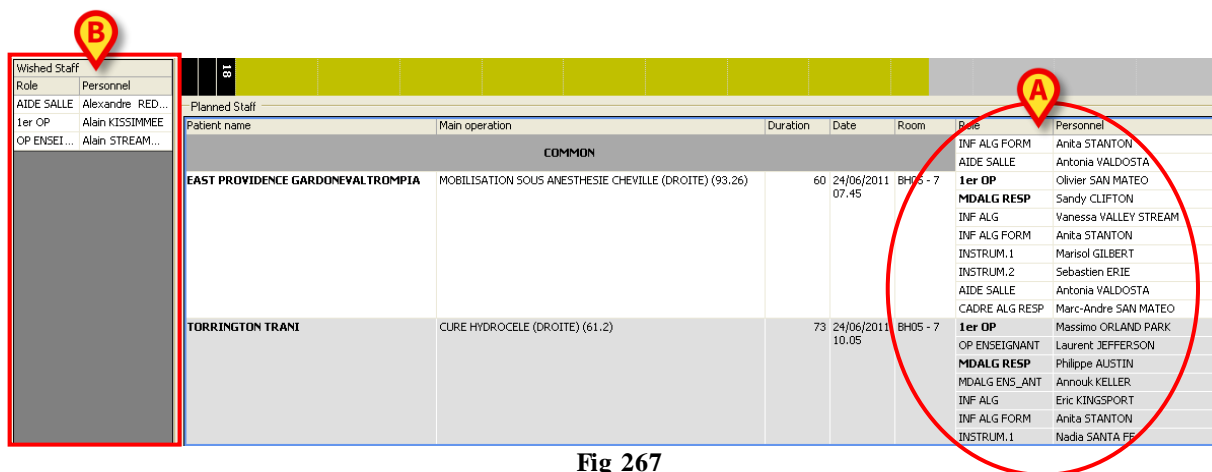


Fig 267

- 2) Second way: right-click on the row corresponding to the wanted staff member on the “Planned staff” area.

A contextual menu opens (Fig 268)

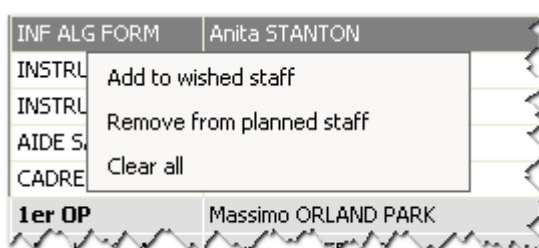


Fig 268

Click, on the menu, the “Add to wished staff” option.

In both cases the name of the staff member is displayed on the “Wished staff” area.

At the end of each procedure, in order to save the changes made,

- click the **Update** button.

### 9.2.3 Remove a staff member from the “Wished Staff” area

There are two ways to remove a member from the wished staff. In both cases, first of all, click the **Edit** button on the command bar, then



- 1) First way: click the row corresponding to the member to remove on the “Wished Staff” area. Drag the row onto the “Personnel table” area (drag from Fig 265 **B** and drop onto Fig 265 **A**).
- 2) Second way: right-click on the row corresponding to the staff member to be removed on the “Wished staff” area.

A contextual menu opens (Fig 269).

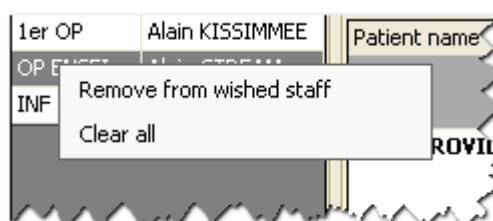


Fig 269

Click, on the menu, the “Remove from wished staff” option.

Click the **Update** button.

In both cases the name of the staff member is removed from the “Wished staff” area.

Also, it is possible to remove the whole staff using the “Remove all” option on the same contextual menu.

## 9.2.4 Creating a “Wished staff” from the planned staff

To add the already existing staff of a planned operation to the “Wished staff” area

- Click the **Edit** button on the command bar.
- Click, on the “Planned staff” area, the operation whose staff must be added to the “Wished staff”.

The row corresponding to the operation is highlighted (Fig 270 **A**).

- Drag the item to the “Wished staff” area (Fig 270 **B**).

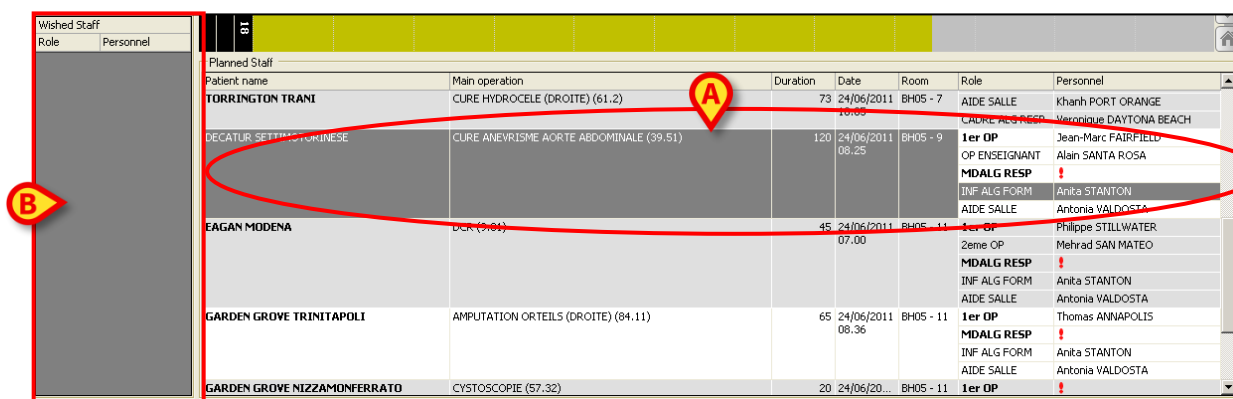


Fig 270

- Click the **Update** button.

All the staff members of the selected operation are this way added to the wished staff.

## 9.2.5 Associating a staff member to one or more operations

To associate a staff member to one or more operations

- Click the **Edit** button on the command bar.
- Use the filters described in paragraph 9.1.1 to search for the person to be associated to the operating staff.
- Drag the person's name onto the "Planned staff" area.

If the name is dragged onto the area relating to a specific operation, the staff member is associated only to that operation. If the name is dragged onto the "Common" area, the staff member is associated to all the selected (and therefore displayed) operations.

- Click the **Update** button.

## 9.2.6 Associating the whole staff to one or more operations

To associate the whole operating staff to one or more operations

- Click the **Edit** button on the command bar.
- Use the procedures described in paragraph 9.2.2 to define the operating staff.
- Click the "Wished staff" bar (Fig 271 A) and drag it onto the "Planned Staff" area (Fig 271

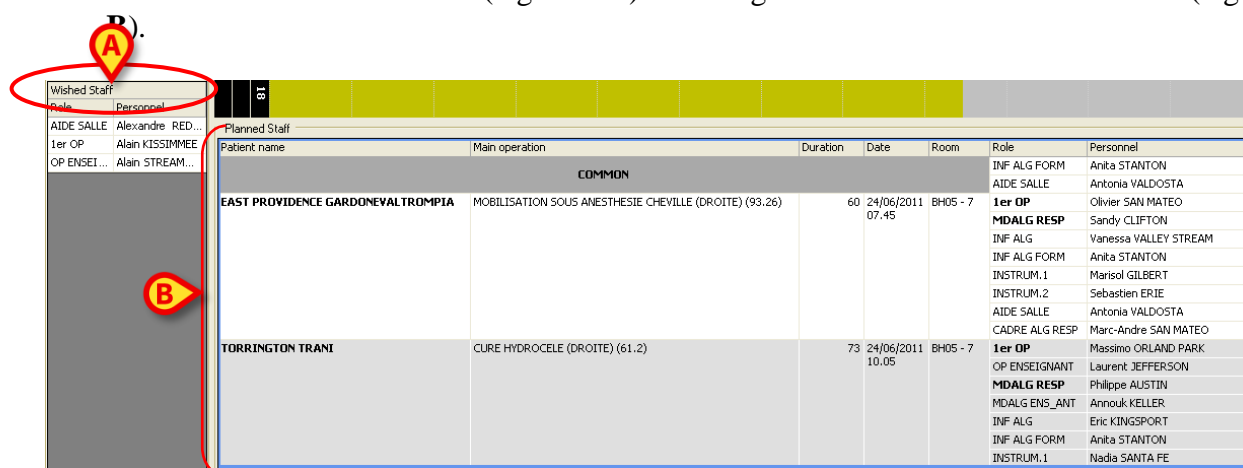


Fig 271

If the bar is dragged onto the area relating to a specific operation, the whole staff previously defined is associated only to that operation. If the bar is dragged onto the "Common" area, the whole staff is associated to all the selected (and therefore displayed) operations.

- Click the **Update** button.

## 9.2.7 Removing a staff member

To remove a planned staff member either from a specific operation or from the “Common” list

- Click the **Edit** button on the command bar.
- Click, on the planned staff grid (Fig 272 A), the row corresponding to the staff member to be removed.
- Drag the item onto the Personnel Table (Fig 272 B).

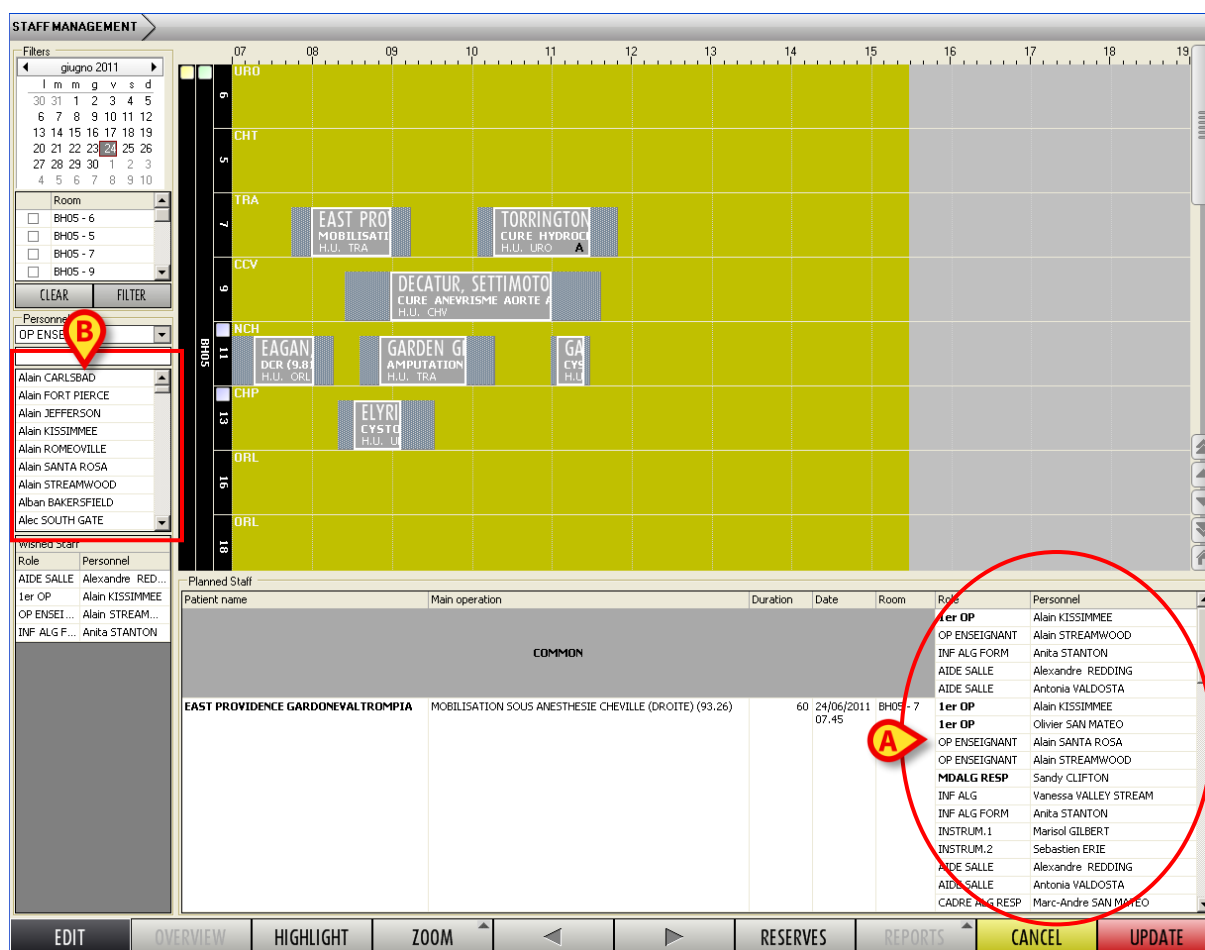


Fig 272

- Click the **Update** button.

The staff member is this way removed either from the specific operation or from all the selected operations.

It is otherwise possible to right-click the staff member name on the planned staff grid.

A contextual menu is displayed (Fig 273).

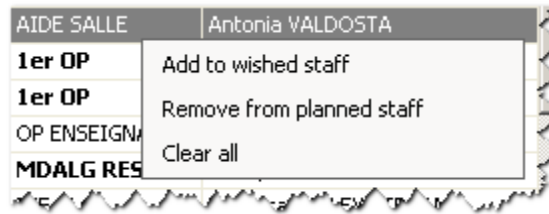


Fig 273

Three options are here available:

- Click the “Add to wished staff” option to add the selected person to “Wished staff” area (Fig 267 B). **Note: this option does not remove the staff member from the planned staff, it only adds him/her to the wished staff.**
- Click the “Remove from planned staff” option to remove the selected member from the planned staff.
- Click the “Clear all” option to remove the whole staff from the planned staff.

## 9.3 Staff overview

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A specific screen displays a general overview of the staff schedule.

To access that screen

- Click the **Overview** button on the command bar.

The following screen is displayed (Fig 274).

Personnel	15/07/2011																	
	BH05-6			BH05-7			BH05-8			BH05-9			BH05-11			BH05-13		
	REDUCT...	ARTHRO...	LIPOFILL...	CURE HA...	ARTHRO...	REDUCT...	REDUCT...	CORREC...	POSE PO...	CORREC...	MAMMO...	AMPUTA...	CORREC...	LIFTING...	REPARA...	CURE EV...	CORREC...	GREFF...
	07.00	09.35	12.40	07.05	08.55	10.38	12.13	07.00	09.05	10.43	12.18	07.05	08.40	10.41	07.05	09.10	07.00	C
ALBUQUERQUE ,LANSING																1er OP		
ATLANTIC ,SEATTLE			1er OP					2eme OP		1er OP						2eme OP		
BAY ,MISSOULA		1er OP																
<del>BAY ,MISSOULA</del>				1er OP														
<del>BAY ,MISSOULA</del>															1er OP			
<del>BAY ,MISSOULA</del>																		1er OP
BEAUMONT ,MACON		INSTRUM.			INSTRUM.													INSTR
BEND ,WILSON		1			1													1
BLACKSBURG ,PLACENTIA																		INF AL
BLOOMINGTON ,KANNAPOLI S																		CADRI
CAPE GIRARDEAU ,NOVATO					1er OP													ALG R
CYPRESS ,GILROY		OP ENSEIGNA NT			OP ENSEIGNA NT													MEDICAL
DUNCANVILLE ,BREMERTON			2eme OP															ENS_
FORT PIERCE ,EAU CLAIRE																		
GRAND JUNCTION ,OWNARD																		
GREENFIELD ,PAWTUCKET																		
<del>GREENFIELD ,PAWTUCKET</del>												1er OP						
HANFORD ,SOUTH GATE											1er OP							
HAWTHORNE ,ARLINGTON CDP								1er OP										
LA MESA ,FOND DU LAC														1er OP			1er OP	
LEWISVILLE ,CHANDLER									2eme OP									
MANCHESTER ,RANCHO SANTA MARGARITA	1er OP																	
MIRAMAR ,PALM SPRINGS																		
MURRIETA ,CLEVELAND HEIGHTS										1er ASS OP								
NORTHGLENN ,BERKELEY																		
RICHLAND ,PITTSBURG						1er ASS OP												
<del>RICHLAND ,PITTSBURG</del>														1er OP				
<del>RICHLAND ,PITTSBURG</del>																		
SALINA ,SPRINGFIELD																		
SAN BUENAVENTURA (VENTURA) ,ARLINGTON HEIGHTS		1er OP					1er OP											
SHEBOYGAN ,REVERE					1er OP													
ST. PETERS ,ROSWELL						1er OP												
TERRE HAUTE ,GRAPEVINE																		MDAL
WACO ,YAKIMA									1er OP									RESP
<del>WINTERBURY ,CLEVELAND</del>																		
CLOSE																		

Fig 274

Each row on this screen represents a staff member; each column represents an operation. The cell corresponding to the place where a certain staff member and a certain operation meet displays the role that the staff member covers for that specific operation. See, for instance, Fig 275 A, indicating that the staff member “Bay Missoula” is first operator in the operation “Arthrodes...” scheduled in room 6 of block BH05 at 9:35.

Personnel	BH05-6			BH05-7		
	REDUCT ...	ARTHRO...	LIPOFILL ...	CURE HA...	ARTHRO...	REDUCT ...
	07.00	09.35	12.40	07.05	08.55	10.38
ALBUQUERQUE ,LANSING						
ATLANTIC ,SEATTLE			1er OP			
BAY ,MISSOULA		1er OP				
BAY ,MISSOULA				1er OP		
BAY ,MISSOULA						
BAY ,MISSOULA						
BEAUMONT ,MACON		INSTRUM. 1		INSTRUM. 1		
BEND ,WILSON						
BLACKSBURG ,PLACENTIA						
BLOOMINGTON ,KANNAPOLI S						
CAPE GIRARDEAU ,NOVATO				1er OP		
CYPRESS ,GILROY		OP ENSEIGNA NT		OP ENSEIGNA NT		
DUNCANVILLE ,BREMERTON			2eme OP			
FORT PIERCE ,EAU CLAIRE						

Fig 275

The operations are ordered by date and time and the grouped by block and room. A heading placed on top indicates the operation's scheduled time, date and place.



*The “Highlight” functionality can be activated to display, on the “Staff Overview” screen, only a selected subset of staff members and their operations. I.e. if, on the “Staff management” screen (Fig 272) one or more staff members are highlighted, the “Staff Overview” screen displays only the operations scheduled for the highlighted staff members. See paragraph 9.1.5 for more information on this functionality.*

## 10 Resources

The “Resources” module makes it possible to schedule resources for interventions. The module implements scheduling functionalities that are specific for the resources.

To access this module click the  icon on the lateral bar.

The following screen opens (Fig 276)



Fig 276

1) Resource selection.

To select a resource

- Click the resource label indicated in Fig 276 A. A drop down menu opens (Fig 277)

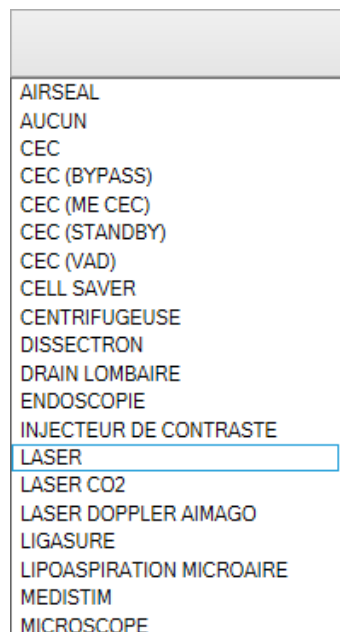


Fig 277

- Select the relevant resource type on the menu.

The resource name is this way displayed on the label. The main screen area will display all the available instances for that resource type. In Fig 278 A the resource type “Laser” is selected. In Fig 278 B there are two available actual lasers displayed. Each row corresponds to a resource (laser in this case).

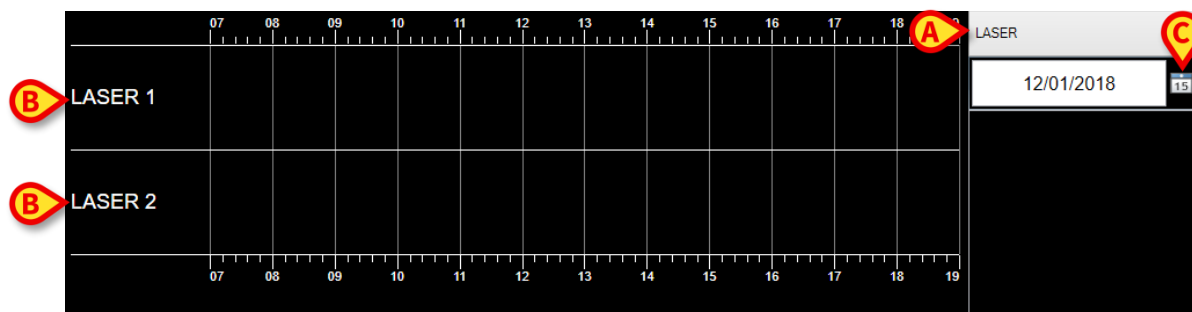


Fig 278

## 2) Operation selection

To associate the operation to the resource

- Click the calendar icon to select the date of the operation (Fig 278 C). A calendar window opens. Select here the relevant date. The default date is the next operating date (usually “tomorrow”).

The operations scheduled for that date that require the selected resource (laser in this case) will be displayed in the column on the right (Fig 279 A).



The resource requirement for the operation can be indicated using the functionality described in paragraph 7.5, on the “Operation Record” screen, “Special Services” area. Otherwise, by configuration, a specific resource can be associated to the type of operation by default. In this case, the resource is automatically associated to every operation of that type.

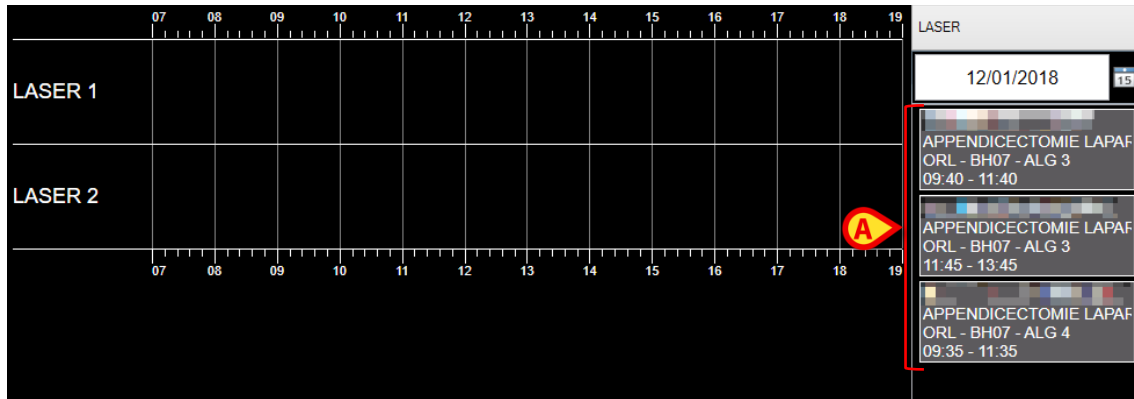


Fig 279

The background color of the rectangle reflects the operation state as in the plan window. Interventions will appear on the list once are (at least) scheduled.

To assign an intervention to a specific resource

- drag and drop it on the row corresponding to the resource.

The intervention will be positioned on the row accordingly to its schedule and removed from the list on the right (Fig 280 A).

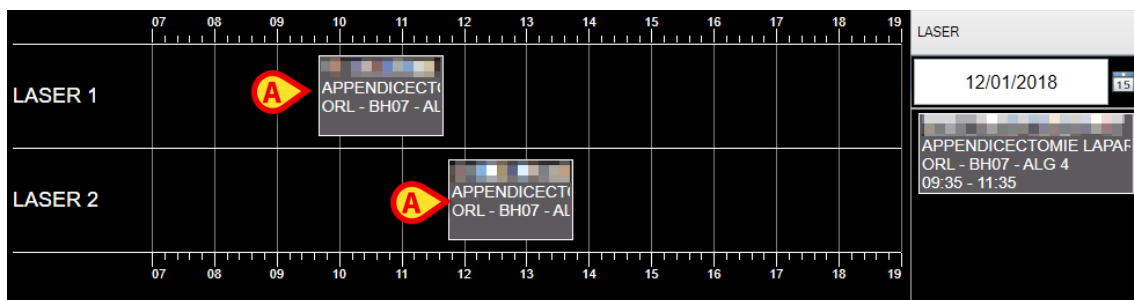


Fig 280

This kind of resource scheduling triggers a series of cross-checks among the operations and operating rooms the can be of help in scheduling the operations requiring special services (i.e. the configured resources) according to their availability.



# 11 Contacts

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For any issue, please refer first to the Distributor who installed the Product.

Here are the manufacturer contacts:

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