Royal United Hospital Bath NHS Trust

Mini Manual

Theatres' Staff

1. **How to find your case retrospectively using Case Selection**
2. **Unfinalise a document**
3. **Finalise a document**

Support available through the following options:

1. Please contact your local Champion User
2. Theatres' Surginet Team - Tel: 01225 82 **5069**
3. Service Desk
   a. Tel: 01225 82 **5444**
   b. Email: ruh-tr.ITServiceDesk@nhs.net
4. Self Service Call Logging via Intranet

Case Selection

1 Case Selection

Step 1. Launch SurgiNet

SNSurgiNet Organiser opens with the following icons showing.

The Case Selection view allows you to find patients booked into surgery by case (booked by the primary procedure). It provides a list of patients booked into the active location. The list of patients can be filtered by the different options provided in the Select By options.

From the toolbar at the top of the Case Selection pane, you can check in patients. You can print, preview and sign finalised documents for the selected patient. You can also change the location for which the list shows.

Note: It is possible to search for a case using different criteria.

Search by clinician

Step by Step Instructions

Step 2. Within SurgiNet click Case Selection.

Step 3. Select Clin Staff from the Select By options.

The Criteria changes.

Note: It is possible to enter the clinician name directly within the Clin Staff field. If there is a single match SurgiNet will pull this through. If there multiple matches the field will display a <<Multiple Matches>> message and you must enter more detail to retrieve the correct clinician.

Step 5. Click the Binoculars  icon.

Case Selection

Step 6. The Clinical Staff Selection window opens.

Step 7. Enter the appropriate clinical staff details (for example, Mead, Lucian).

Step 8. Click Search.

Step 9. The search results are returned.

Step 10. Select the required staff member and click OK.

Note: If there are multiple matches you can enter more detail and click Search again.

Step 11. The Clin Staff field is complete.

Step 12. Click the From Date drop-down then select the required date from the calendar.

Step 13. Enter the required date in the To Date field.

Step 14. Click Retrieve.

Step 15. A list is returned on the cases matching the search terms.

Step 16. The clinician's cases for the entered date range are displayed.

Open a patient record

Step by Step Instructions

Step 17. Within the **Case Selection** screen select your patient.

Step 18. Open the patient record.

Note: Two ways of opening the patient record are:

Option 1. Double click the selected patient. This will take you to the **Patient Information** pane within the

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patient record.

Option 2. With the patient selected, select from the **Record** menu the part of the patient record (for example, **Patient Information**) that you wish to access.

The patient's record opens.

Close a patient record

Step 19. Select the **X** next to the patient name

Step 20. The patient's record closes.

Exit SurgiNet

Step 21. To log out of ***SurgiNet***, click **Exit** on the toolbar.

Step 22. The **Exit Application** dialog opens.

Step 23. Select the **Exit and shut down the application?** radio button then click **Yes** to close ***SurgiNet***.

Step 24. ***SurgiNet*** closes.

2 Unfinalise / Finalise a Document

Unfinalising a document

Scenario: In the event of finalising in error or a correction/amendment is required the documentation can be unfinalised.

Step 1. Open a patient record and select Perioperative Doc in tab menu.

Step 2. Select the perioperative document to be amended.

Step 3. Click on the Un-finalise button .

The Unfinalise Document window appears

Step 4. From the drop down select a reason for unfinalising the document and add any supporting notes in the Additional comments free text field.

Step 5. Click OK

The documentation segment is restored back to its last state.

Finalise a document

Scenario: The segments have been completed (green ticks in all segments) and the document is now ready to be finalised.

Step 1. Click the green flag - **Finalise**  icon .

The **Document Verified** dialog is displayed verifying that the document has no deficits and can therefore be finalised.

Step 2. Click **Yes** to close the **Document Verified** dialog.

Note: If all the required fields are not completed, the **Documentation Deficits** dialog opens. Double-click the segment within the dialog to open the required screen and complete all the mandatory fields.

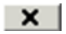
The **Print Document** dialog opens.

Step 3. Click **Yes** or **No** as appropriate.

Note: It is optional to print the finalised report at this stage. All finalised documentation will be available to view and/or print from the patient record Quick View, Record View,**Documentation** and in PowerChart from **Clinical Notes** tab.

The document will open in the Preview pane.

Step 4. Check and review that all of the information is correct.

Step 5. Select **Task>Exit** from the toolbar, or click  to close the patient's record.

Result: The documentation has been reviewed and unfinalised. and finalised.

Business Rules

Business Rules

1. All surgical trays, supplementaries and prepacks should be recorded on the Instrument Tray Details segment on the Intra Op Document using a hand held barcode scanner.
2. All Loan Equipment should be recorded on the Loan Equipment Details Segment on the Intra Op Document.
3. The Op Note must be written up using PowerChart/Millennium before the Patient leaves the Theatre Complex, and it must record a minimum of "Actual Procedure" and "Post Op Instructions".
4. The Op Note must be printed and attached to the Patient Notes.
5. The PreOp, IntraOp and PostOp Summaries must be printed, and a copy of each attached to the Patient Notes, and a physical signature on each paper document is mandatory.
6. The WHO Checklist must be completed for each case.
7. All People present in Theatre must be recorded.
8. Timings should be documented accurately.
9. If a Surginet patient record is locked by another member of Staff, it should only be unlocked with agreement from the lock holder.
10. The preloading of patient data onto Surginet should only happen while the patient is in the Anesthetic Room and only when the procedure is definitely going ahead.
11. Perioperative Documents must be finalised.
12. Every Patient episode in theatre must be documented in Surginet.