

OR Booking Package User Guide for Version 1.6

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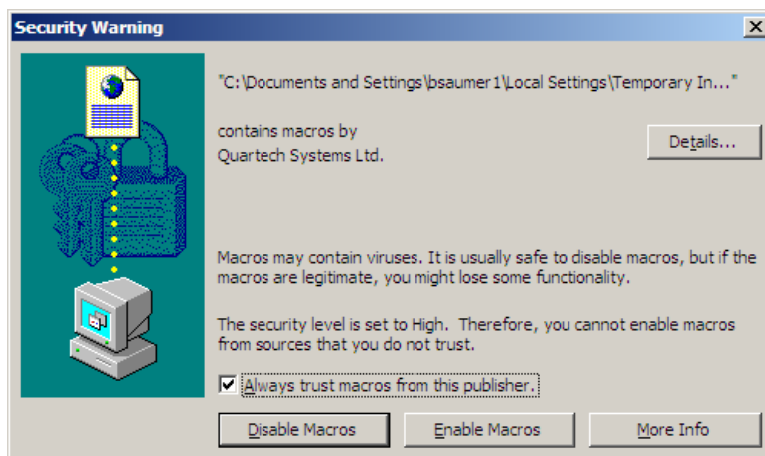
1. Installation Instructions

Overview

The OR Booking Package is a Microsoft Word Document with macros. A macro is a series of MS Word commands and instructions that are grouped together to accomplish a task automatically. Macros from unknown sources may introduce viruses into your computer. As a security measure, we have had our MS Word document “digitally certified” by Quartech Systems Ltd. This document outlines the steps to use the OR Booking Package under High Security settings.

Word 97 - 2003

Upon opening the OR Booking Form under High Security in Word 97 through 2003, you will see the following dialog:

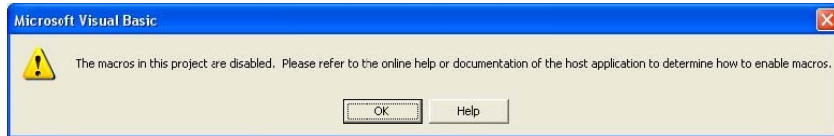


1. Check “Always trust macros from this source”
2. Click the Enable Macros

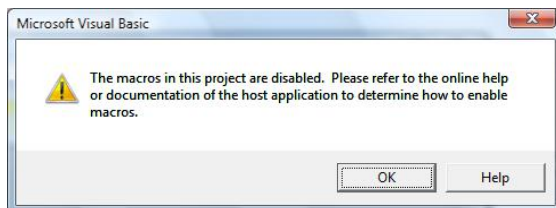
NOTE: Some workstations may be configured such that “Always trust macros from this source” is grayed out or disabled. If this is the case, you must click Enable Macros every time you wish to use the OR Booking Form.

Word 2007

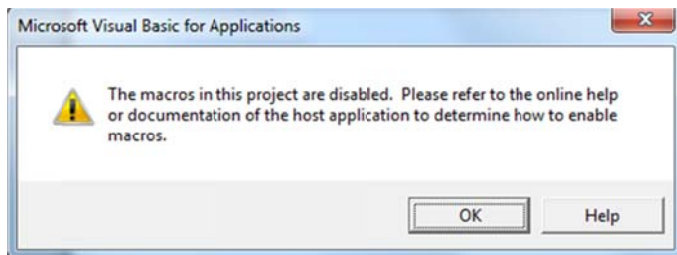
Upon opening the OR Booking Form under High Security in Word 2007, you receive the following dialog indicating that Macros are disabled. On Windows NT/XP or 2000, that dialog will look like the following:



On Vista, it will look like this:

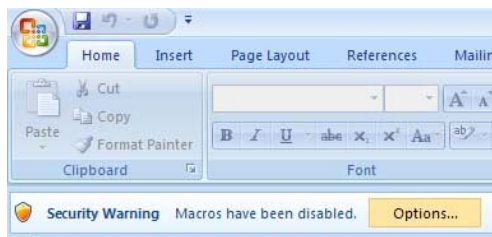


On Windows 7, it will look like this:



1. Click OK to clear the dialog

The Word 2007 Message Bar will provide options available for the Security Warning.



2. Click the Options... Button on the Message Bar

Clicking Options will provide the following dialog:



3. Change selection to “Trust all documents from this publisher”

4. Click OK

NOTE: If “Trust all documents from this publisher” is not available, you will have to choose “Enable this content” every time the OR Booking is opened.

1.1.1 Troubleshooting Word 2007

Some settings in World 2007 may prevent you from executing the four steps described in the previous section

1.1.2 Message Bar Does Not Appear (Step 2)

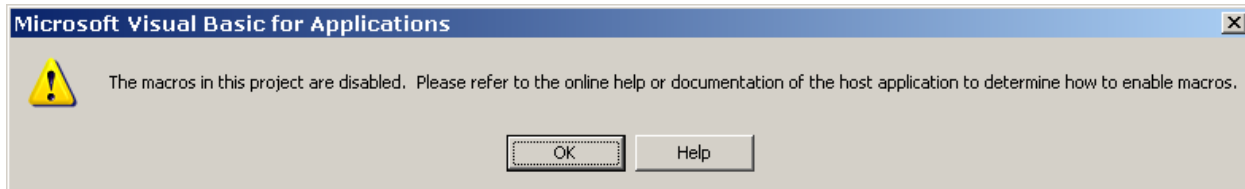
There are two reasons the Message Bar will not appear in Word 2007. They can be seen with a resolution in the table below:

Reason	Description	Resolution
Security Too High	No macros allowed to run	<ul style="list-style-type: none"> Click Office Button Choose Word Options Choose Trust Center then Trust Center Settings Change to “Disable All Macros with Notification”
Message Bar Disabled	Message Bar set to hidden	<ul style="list-style-type: none"> Choose View on Menu Check Message Bar under Show/Hide Pane

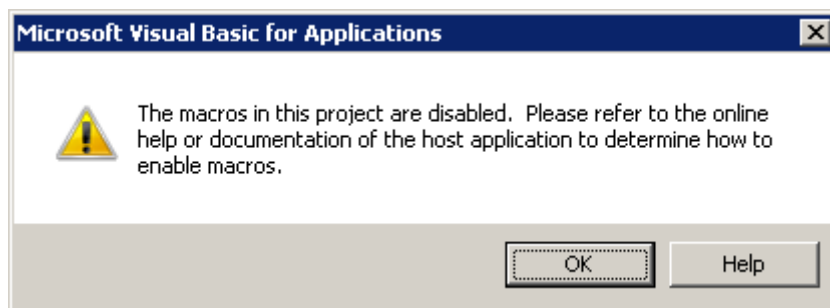
Word 2010

Upon opening the OR Booking Form in Word 2010, if the following dialog box appears this indicates that Macros are currently disabled and Macros will have to be enabled. See instructions below under “*Enabling Macros in Word 2010*”.

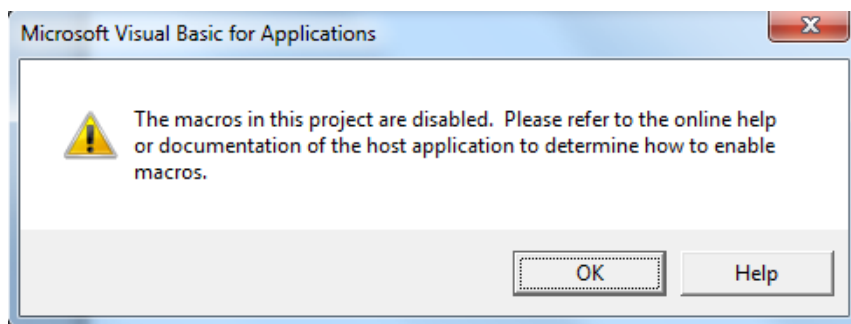
On Windows NT/XP or 2000, the dialog box will look like the following:



On Vista, it will look like this:

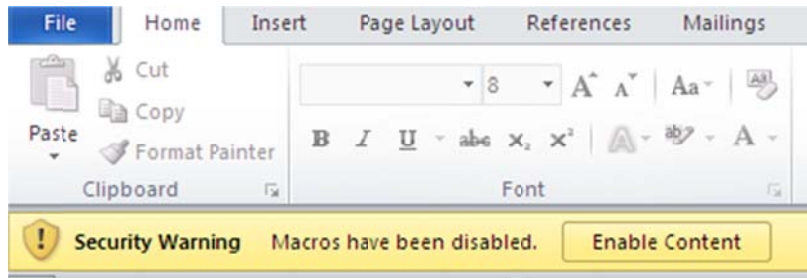


On Windows 7, it will look like this:



1. Click OK to clear the dialog

Additionally, the Word 2010 Message Bar (in yellow) may appear with the following Security Warning.



1. Click the “Enable Content” button on the Message Bar and you will be able to navigate through the form.
2. If the (yellow) Message Bar does not appear and you are not able to navigate through the form (by pressing the tab key) then the Message Bar may be hidden. See instructions below under “*Message Bar Does Not Appear*”.

1.1.3 Troubleshooting Word 2010

Some settings in World 2010 may prevent you from using the form as expected. The following describe resolution if macros are disabled or the Word Message Bar does not appear and you are not able to navigate through the form.

1.1.4 Enabling Macros in Word 2010

If one of the dialog boxes above appears in Word 2010, follow the Resolution steps below:

Reason	Description	Resolution
Security Too High	No macros allowed to run	<ul style="list-style-type: none"> • Click File • Choose Options • Choose Trust Center • Click on the “Trust Center Settings...” button • Select “Macro Settings” • Change the option to “Disable all macros except digitally signed macros”

1.1.5 Message Bar Does Not Appear

If the Message Bar does not appear in Word 2010, follow the Resolution steps below:

Reason	Description	Resolution
Message Bar Disabled	Message Bar set to hidden	<ul style="list-style-type: none"> • Click File • Choose Options • Choose Trust Center then Trust Center Settings • Choose Message Bar • Change to “Show the Message Bar in all applications...”

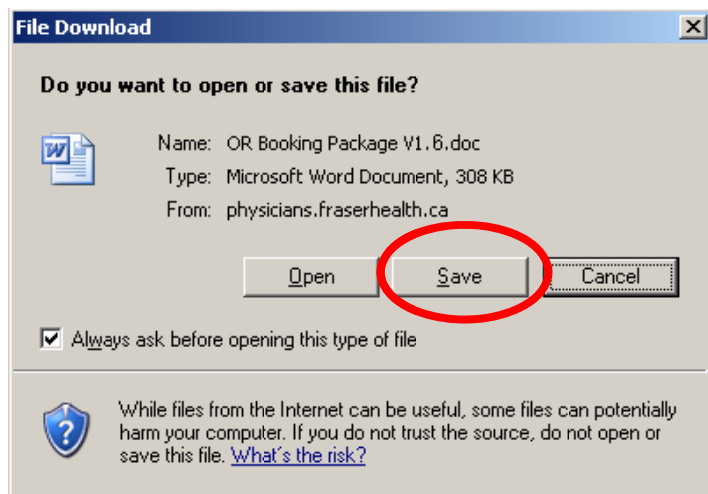
2. Downloading and Opening the OR Booking Package

1. To download the MS Word OR Booking Package (Surgical Booking Form and Surgical Pre-Operative Test Order Form) click on the Download link “[OR Booking Package \(MS Word format\)](#)”.

http://physicians.fraserhealth.ca/resources/forms/or_booking_package



2. Click on Save and select a location to save “OR Booking Package V1.6.doc.”

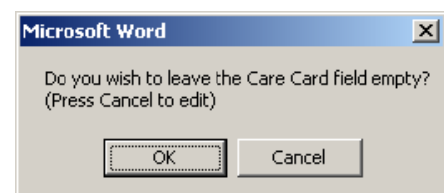


3. Click on Open and the document will open on the SURGICAL BOOKING FORM that is ready for data entry.
4. If you save the document, then the data previously entered will already be in the Word Document.

5. To download a review/list of changes to this version of the OR Booking Package click on the Download link
[“OR Booking Package Changes”](#)
6. To download the PDF format Surgical Booking Package (Surgical Booking Form and Surgical Pre-Operative Test Order Form) click on the Download link
[“Printable OR Booking Forms”](#)
7. To download the PDF format Surgical Booking Form only click on the Download link
[“Printable Surgical Booking Form”](#)
8. To download the PDF format Surgical Pre-Operative Test Order Form only click on the Download link
[“Printable Surgical Pre-Operative Test Order Form”](#)
9. To download the PDF format VTE Prophylaxis Pre-Operative Surgery Form only click on the Download link
[“Printable VTE Prophylaxis Pre-Operative Surgery Form”](#)

3. Tips & Hints

- Keep the “Caps Lock” off when using this form. This allows space for more characters in each field.
- While the “OR Booking Form” document is open, the “Enter” key will not function in any other open MS Word Documents. To re-enable the “Enter” key, close the “OR Booking Form” document.
- Use the tab key to move through the form. This ensures that repeated information, such as “Care Card#,” will automatically carry over, or “auto-populate,” to other forms.
- To delete an entry, do one of the following:
 1. Return to the field using the left, right, up or down arrow keys and retype or delete your entry.
 2. Use the mouse to highlight the field and retype or delete your entry.
- To add an “X” to a checkbox, there are two options:
 1. Use the mouse to click on the box.
 2. Use the “Tab” key to move to the box, and hit the “X” key or spacebar.
- If you receive a message (*pictured right*), and do not have information to complete the field, click “OK” to bypass the field.
- Macro Security Warning Messages are addressed in the section on “Installation Instructions.”



4. Data Entry Instructions

The following formats are accepted in most date fields:

dmmYYYY	d*mm*YYYY
ddmYYYY	dd*mm*YYYY
d*m*YYYY	dd*m*YYYY
d*mmm*YYYY	dd*mmm*YYYY
mmm*d*YYYY	mmm*dd*YYYY

Key:

d or dd	= day
m or mm	= month as a number
mmm	= month as a 3 letter abbreviation, ex. "Sep"
YYYY	= year
*	= "/" or "-" or " " or ","

5. Surgical Booking Form Instructions:

Field	Comments
<i>Hospital Site</i>	Place an "X" in the appropriate box.
<i>Patient Name</i>	Always use patient's legal surname, legal first name and middle initial, even if name does not match care card.
<i>Other Name</i>	Any other name used, such as preferred name.
<i>DOB (Date of Birth)</i>	Enter date in format previously indicated.
<i>Age</i>	<ul style="list-style-type: none"> Automatically calculated from DOB based on today's date Will display as weeks, months, or years: <ul style="list-style-type: none"> Less than 1 week old, will show "0" 1 week up to 2 months old, will show "X wk" 2 months up to 24 months will show "X mo" 2 or more years, will show as "X" for years
<i>Sex</i>	Place an "X" in the appropriate box.
<i>Address/City</i>	Patient's primary residence
<i>Province</i>	Use 2 Letter abbreviations. Lowercase, "bc" will reformat to uppercase, "BC."
<i>Postal Code</i>	Lowercase, ""v5v5v5"" will reformat to uppercase with a space, "V5V 5V5."

<i>Phone (Residential, Cell, or Business with extension)</i>	Enter all known phone numbers. Include area code. "6045559999" will reformat to "604-555-9999."
<i>Family Physician</i>	Patient's usual physician.
<i>Referring Physician</i>	Complete only if different from family physician.
<i>Surgeon/Physician</i>	Surgeon's first and last name. Include middle initial if necessary to uniquely identify the surgeon.
<i>Assistant</i>	Check "Yes or No" to indicate if an OR assist is required. Complete assistant's name if known.
<i>Care Card #</i>	<p>This field is mandatory.</p> <ul style="list-style-type: none"> 10-digit Care Card number without spaces. Also known as PHN (Primary Health Number). If the patient is RCMP, prison inmate, WCB case, private pay, etc., and does not have or know their PHN, ORB staff will "search or create" a PHN for patient.
<i>Billing Info</i>	Specify plan and number, including RCMP, WCB, inmate, etc.
<i>Date of Referral</i>	This field is mandatory. The date the surgeon's office received a fax, e-mail, letter, or a telephone call from a medical doctor requesting a consult.
<i>Date of First Consult</i>	This field is mandatory. The date of the patient's first consult with the surgeon.
<i>Surgery Decision Date</i>	<p>This field is mandatory.</p> <p>For the purposes of decision date, a Paediatric patient is defined as an individual who is 17 minus one day old on the date of decision. Adult patient is 17 years old and above.</p> <p>The decision date for PAEDIATRIC patients is the date that:</p> <ol style="list-style-type: none"> 1) The surgeon and family mutually agree to proceed with surgery; AND 2) All diagnostic and/or procedural tests are completed (i.e. includes all tests required to determine diagnosis or surgical procedure, but excludes pre-operative tests routinely done days or weeks in advance of surgery); AND 3) The patient is developmentally ready for surgery. <p>The decision date for ADULT patients is the date that:</p> <ol style="list-style-type: none"> 1) The surgeon and patient mutually agree to proceed with surgery; AND 2) All diagnostic and/or procedural tests are completed (i.e. includes all tests required to determine diagnosis or surgical procedure, but excludes pre-operative tests

	<p>routinely done days or weeks in advance of surgery); AND 3) The patient is ready, willing and able to accept a surgical date.</p>
<i>OR Date</i>	Planned surgery date for the patient. Complete if known.
<i>Admission Date</i>	Leave this field blank for ORB staff use.
<i>Priority</i>	Place an "X" in the appropriate box to indicate when the surgeon believes the patient should have surgery based upon their condition and diagnosis.
<i>Admission Type</i>	<ul style="list-style-type: none"> • SDC = Surgical Day Care (in and out same day) • SDA = Same Day Admission (in day of surgery and staying over at least one night) • INPT= Inpatient (was in hospital when decision for surgery made) • ABS = Admit Before Surgery (admitted at least 1 day before surgery date)
<i>ICU/Monitor Bed</i>	Indicate if an ICU bed (Intensive Care Unit) will be required or a Monitor Bed potentially will be required for this patient.
<i>Procedure(s)</i>	The PRIMARY procedure is the most invasive and resource intensive procedure to be scheduled. This is also the procedure reported in most reports. There will be some capability to capture additional procedures in reports. Abbreviations to procedures are not accepted.
<i>Side</i>	Type "b," "l," or "r". This field will auto-populate with "Bilateral," "Left," or "Right" as required.
<i>DIAGNOSIS CODE</i>	This field is mandatory for Adult and Paediatric patients. This is a 6 character BC WT (Wait Time) Code from BC List of Patient Condition and Diagnosis Descriptions.
<i>CJRR Revision Code</i>	This field is mandatory for total hip or knee revisions. Otherwise, leave it blank.
<i>DIAGNOSIS(OTHER)</i>	This field is mandatory for 'other' codes. Surgeon specified diagnosis when using 'other' BC WT Codes (e.g. 30ZZZA - General Surgery Other P1) from the BC List of Patient Condition and Diagnosis Descriptions.
<i>BMI if >40</i>	If the BMI is over 40, enter the actual BMI, otherwise leave blank
<i>Skin-to-Skin (Minutes)</i>	Total skin-to-skin time in minutes for all procedures. Do not include set up or take down time, only actual skin to skin time required.

<p><i>Oncology</i></p>	<p>This field is mandatory. Place an “X” in the appropriate box. This question refers to the procedure being booked not to the previous or unrelated medical history of the patient.</p> <p>DEFINITIONS:</p> <p>Cancer is PROVEN if the patient is being treated for a known cancer, or if the procedure is part of an integrated cancer treatment plan (e.g. reconstruction). In all other circumstances cancer is not proven.</p> <p>For example, a mastectomy for a biopsy-proven breast carcinoma or the later surgical reconstruction of the mastectomy defect.</p> <p>Cancer is SUSPECTED only if the clinical features and investigations indicate that cancer is a likely possibility.</p> <p>For example, open biopsy of a suspicious lesion, or resection of a suspicious lesion that has not been biopsied, but has all the clinical features of cancer and is undergoing a wide resection as a diagnostic and therapeutic procedure (e.g. a melanoma).</p> <p>Cancer is NOT SUSPECTED if the clinical features and investigations indicate that cancer is not present or very unlikely.</p> <p>For example, a patient undergoing total hip replacement for arthritis.</p>
<p><i>OR Needs</i></p> <p>SPECIAL EQUIPMENT/IMPLANTS</p>	<p>Place an “X” in the appropriate box (or boxes).</p> <p>If any special equipment or implant is required, enter it in the SPECIAL EQUIPMENT/IMPLANT space. There are 2 lines of space provided. Do not use the “Enter” key. Keep typing and the text will “wrap” to the next line. This will provide the most space.</p>
<p><i>Patient Alerts</i></p>	<p>Place an “X” in the appropriate box as indicated by patient questionnaire.</p>
<p><i>Comments</i></p>	<p>Use for any additional information the OR staff will need to know to prepare for this case. For example, “XRAY in OR is required however it will not be required until the end of the surgery.”</p>
<p><i>Anaesthetic Type</i></p>	<p>Indicate the anaesthetic preference here; the final decision is always made after conversation between the anaesthesiologist and patient.</p>
<p><i>Unavailable Period Info</i></p>	<ul style="list-style-type: none"> UNAV. START DATE = Date when the Unavailable Period Starts *MONTH AS A NUMBER ONLY

	<p>(ex. Dec 31, 2010 is 31/12/2010)</p> <ul style="list-style-type: none"> UNAV. END DATE = Date when the Unavailable Period Ends *MONTH AS A NUMBER ONLY (ex. Dec 31, 2010 is 31/12/2010) UNAV. REASON = Reason for the Unavailable Period. REASONS: Medical (ex. Not physically fit for surgery/awaiting test results) Travel (ex. Out of the Country for 2 weeks) Work (ex. Working double shifts for the next month) Other (ex. Primary care provider to dependant without support) <p>Note: Minimum Unavailable Period is two weeks and maximum Unavailable Period is one year</p>
<p><i>OR Booking Form Received</i></p>	<p>Leave this field blank. The form will be “date stamped” when booking package is received in ORB office.</p>
<p><i>Unit #</i></p>	<p>The unit # is a unique identifier used by each hospital health record department to track patients. Some ORB offices already ask that this number be included on the ORB form. If so, please include. If not, then bypass the field.</p>

6. Sample Surgical Booking Form with Mandatory Fields

SHADED AREAS INDICATE MANDATORY



SURGICAL BOOKING FORM



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ARH <input type="checkbox"/> BH <input type="checkbox"/> CGH <input type="checkbox"/> DH <input type="checkbox"/> ERH <input type="checkbox"/> JPOCSC <input type="checkbox"/> LMH <input type="checkbox"/> PAH <input type="checkbox"/> RCH <input type="checkbox"/> RMH <input type="checkbox"/> SMH <input type="checkbox"/>													
PATIENT SURNAME (legal)		FIRST NAME (legal)		OTHER NAMES		DOB (d/m/yyyy)		AGE		SEX M <input type="checkbox"/> F <input type="checkbox"/>			
ADDRESS						PHONE Res			Cell				
CITY		PROVINCE		POSTAL CODE		Bus			Ext				
FAMILY PHYSICIAN				REFERRING PHYSICIAN (if not family)									
SURGEON / PHYSICIAN Dr				ASSISTANT		YES <input type="checkbox"/> NO <input type="checkbox"/>		CARE CARD#					
BILLING INFO: MSP <input type="checkbox"/> PRIVATE <input type="checkbox"/> OTHER <input type="checkbox"/> IF NOT MSP SPECIFY: PLAN #													
DATE OF REFERRAL (d/m/yyyy)				DATE OF FIRST CONSULT (d/m/yyyy)				SURGERY DECISION DATE (d/m/yyyy)					
OR DATE (d/m/yyyy)				ADMISSION DATE (d/m/yyyy)									
PRIORITY 1A <input type="checkbox"/>		1B <input type="checkbox"/>	1C <input type="checkbox"/>	2A <input type="checkbox"/>	2B <input type="checkbox"/>	3A <input type="checkbox"/>	ADMISSION TYPE		SDC <input type="checkbox"/>	SDA <input type="checkbox"/>	INPT <input type="checkbox"/>	ABS <input type="checkbox"/>	
STAT		<8 hr	<24 hr	<72 hr	<3 wk	>3 wks	Will Require:		ICU <input type="checkbox"/>	Potential/MONITOR BED <input type="checkbox"/>			
PROCEDURE(S) - PLEASE LIST THE PRIMARY PROCEDURE FIRST. (It is the most invasive and resource intensive procedure)													
1) SIDE		PROC.											
2) SIDE		PROC.											
3) SIDE		PROC.											
4) SIDE		PROC.											
DIAGNOSIS CODE:				CJRR Revision Code:				BMI if > 40		ONCOLOGY/CANCER:			
DIAGNOSIS(OTHER):				Skin to Skin (Minutes)				Not Suspected <input type="checkbox"/>		Suspected <input type="checkbox"/>		Proven <input type="checkbox"/>	
OR NEEDS: (List other needs in Comments)		LYMPHOMA PROTOCOL <input type="checkbox"/>		FROZEN SECTION <input type="checkbox"/>		TISSUE REQUIRED <input type="checkbox"/>							
		C-ARM REQUIRED <input type="checkbox"/>		X-RAY in OR <input type="checkbox"/>									
SPECIAL EQUIPMENT/IMPLANTS:													
PACEMAKER <input type="checkbox"/> MH HISTORY <input type="checkbox"/> Type2DM <input type="checkbox"/> Type1DM <input type="checkbox"/> INFECTION CONTROL <input type="checkbox"/>													
LATEX ALLERGY <input type="checkbox"/> SLEEP APNEA <input type="checkbox"/> INTERPRETER REQ'D <input type="checkbox"/> IF YES, LANGUAGE:													
COMMENTS:													
ANESTHETIC TYPE: GEN <input type="checkbox"/> LOC <input type="checkbox"/> REG <input type="checkbox"/> SP <input type="checkbox"/> EPID <input type="checkbox"/> IV SED <input type="checkbox"/> TOPICAL <input type="checkbox"/>													
UNAVAILABLE PERIOD INFO: UNAV. START DATE (d/m/yyyy) UNAV. END DATE (d/m/yyyy) UNAV. REASON													
OR BOOKING FORM RECEIVED (d/m/yyyy):						UNIT #							

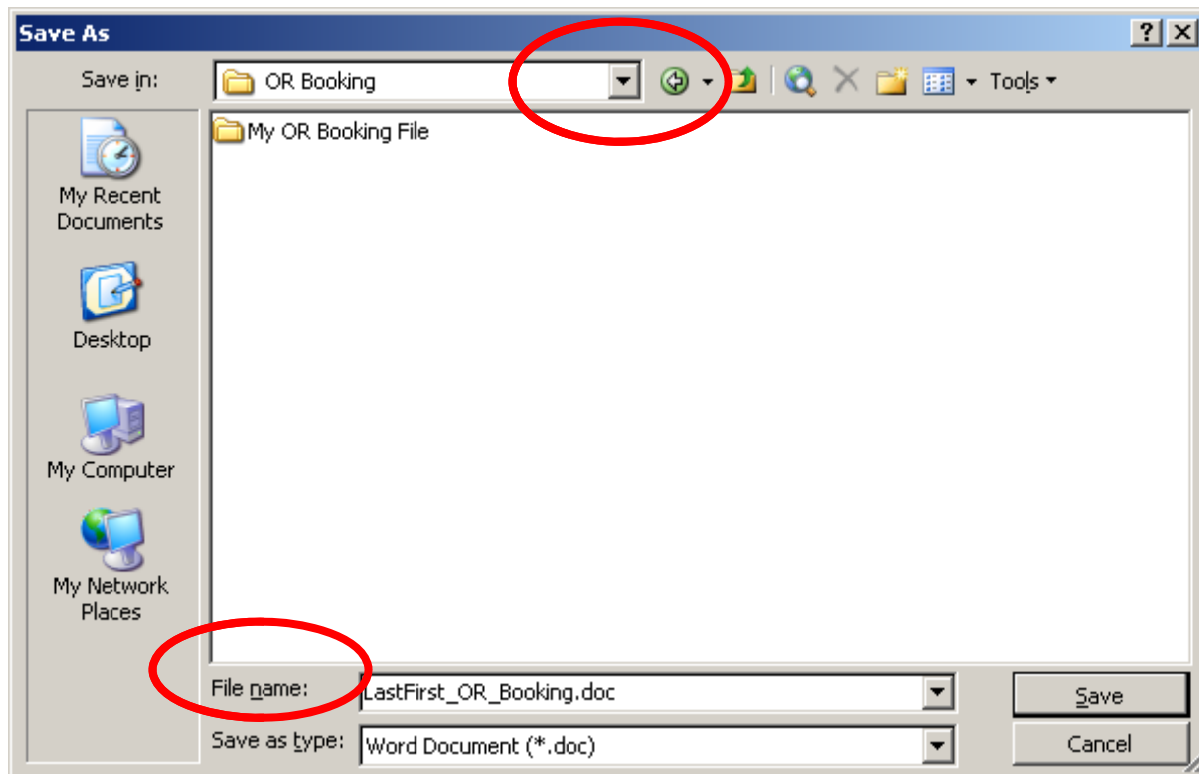
7. Surgical Pre-Operative Test Order Form Instructions:

The following are instructions for new/changed fields for this form:

Field	Comments
<i>Not Applicable For This Patient</i>	There are no results for this patient.
<i>Non FH Results Attached</i>	The patient has results from outside Fraser Health. The results have been attached to the OR booking package.
<i>Refer to Previous FH Results</i>	The patient has previous results from Fraser Health. These results should be obtained from Meditech EMR.
<i>Anaesthesia Consult as Required</i>	Elective patients will be screened by the nurse in Pre-admission Clinic. The nurse will use a criteria set, determined by the regional anesthetic group, to determine if a patient requires a consult by anesthesiology. If you have determined that the patient requires a consult in your office please circle 'Required'.

Appendix 1: Instructions for Saving a File

1. In MS Word, click on **File** (top left hand corner).
2. Choose **Save As**
3. In the “save as” box, choose the folder where you wish to save your new document. Click the “arrow” circled below, and a drop down list will show. Make sure to save to a folder you have saved to before or one you know where you will be able to retrieve the file.




4. You can now rename the document to something that you will recognize. Where it says “File name,” circled above, type in the title of your document.
5. Now click **Save**.

Appendix 2: Instructions for Using the Search Feature

Search For Completed Bookings


The new search feature is an advanced tool that will help you find documents that were previously completed and saved.

- You can search for them based upon the values that were entered into “Surgery Decision Date” and “OR Date” fields, pictured below.
- The search function will find all files within specified folders and specified range of dates for either of these two fields.
- With using this feature, there is a risk that your search may miss bookings if not performed correctly.
- **Please read the "Search Hints" at the end of this section before use, and familiarize yourself with this feature.**



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SURGICAL BOOKING FORM



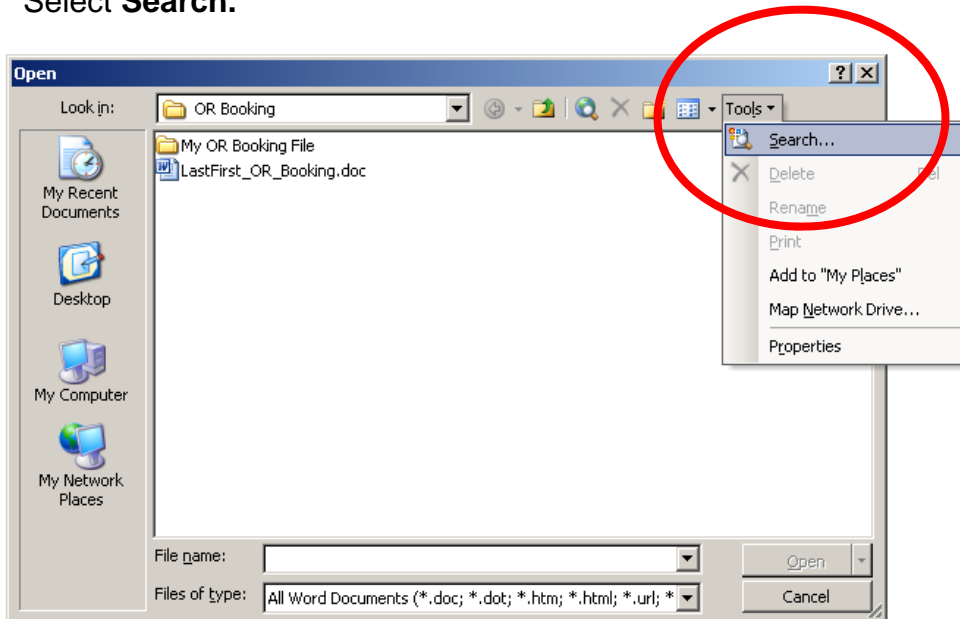
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ARH <input type="checkbox"/> BH <input type="checkbox"/> CGH <input type="checkbox"/> DH <input type="checkbox"/> ERH <input type="checkbox"/> JPOCSC <input type="checkbox"/> LMH <input type="checkbox"/> PAH <input type="checkbox"/> RCH <input type="checkbox"/> RMH <input type="checkbox"/> SMH <input type="checkbox"/>					
PATIENT SURNAME (legal)			FIRST NAME (legal)		OTHER NAMES
			DOB (d/m/yyyy)		AGE SEX
					M <input type="checkbox"/> F <input type="checkbox"/>
ADDRESS			PHONE Res		Cell
CITY	PROVINCE	POSTAL CODE	Bus		Ext
FAMILY PHYSICIAN		REFERRING PHYSICIAN (if not family)			
SURGEON / PHYSICIAN		ASSISTANT YES <input type="checkbox"/> NO <input type="checkbox"/>		CARE CARD#	
Dr					
BILLING INFO: MSP <input type="checkbox"/> PRIVATE <input type="checkbox"/> OTHER <input type="checkbox"/> IF NOT MSP SPECIFY: PLAN _____ # _____					
DATE OF REFERRAL (d/m/yyyy)		DATE OF FIRST CONSULT (d/m/yyyy)		SURGERY DECISION DATE (d/m/yyyy)	
OR DATE (d/m/yyyy)		ADMISSION DATE (d/m/yyyy)			

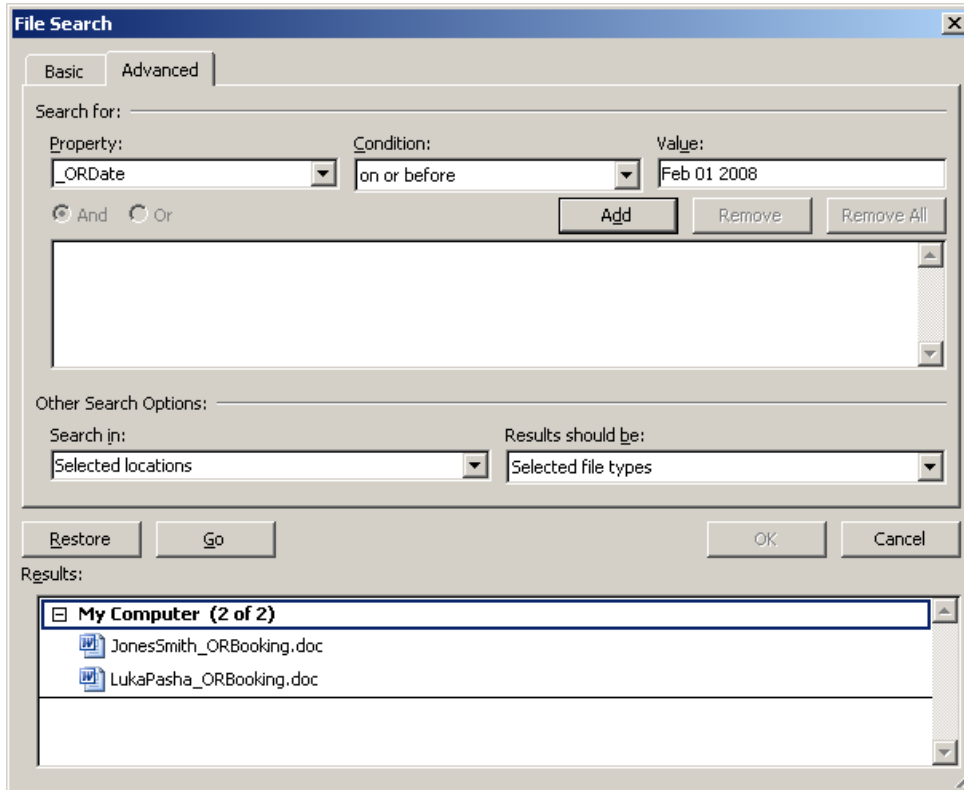
Starting the Search

Note: The following instructions may vary depending upon your version of MS Word. This example uses MS Word 2003.

1. In MS Word go to the **File** Menu, and select **Open**. The **Open** menu will appear as shown below.
2. Select **Tools** on the top right.
3. Select **Search**.



- The **File search** menu will appear as shown below. Click on the **Advanced** tab at the top of the menu.



The two properties of interest are the **_ORDate** and the **_DecisionDate**, which equate to the Surgery Decision Date and OR Date on the OR Booking Forms. See below for some search hints.

Search Hints

Search Parameter	Comments
Property	Type either <code>_ORDate</code> <i>or</i> <code>_DecisionDate</code>
Value	<ul style="list-style-type: none"> • The date field on the OR Booking Forms is handled differently than the date in the Value field in the search screen. • Your computer setting may also affect the day/month order. • To avoid confusing the month and day as numeric values, format the date with the month written out, For ex: December 10, 2008
And – Or	<ul style="list-style-type: none"> • Use to create multiple conditions for the search • You can add multiple search criteria by entering each one and then clicking the Add button.
Search locations	Select folders containing the OR Booking Forms
Results should be	Choose “Word Files” as the selected file type