



Memorial Sloan Kettering
Cancer Center

Optimizing Picklists and Preference Cards: A Recipe for Success

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Background

Picklists and preference cards function like a recipe for perioperative practice, providing the “ingredients” staff need to prepare safely, efficiently, and consistently for surgery. This supports:

- Employees on orientation
- Nurses and surgical technologists (STs) preparing for cases
- Experienced staff rotating to various services

At Memorial Sloan Kettering (MSK), preference cards were traditionally maintained by service team leads in the Electronic Health Record (EHR). This location proved to have several challenges, including:

- Cards could only be accessed via a patient surgical record
- No access during EHR downtime
- Limited access caused staff to print cards and out of date preferences were circulating in the OR
- No customizations possible (photos, external links, etc.)
- Inability to standardize preference cards with surgeon specifics not possible within the EHR

These findings demonstrated the need for a modern, flexible, and accessible platform that meets the needs of our OR staff.

Description of Team

Service Team
Leaders

Clinical Nurse
Managers

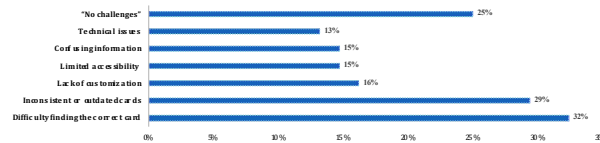
Nurse Leaders

Prep and Plan

The group brainstormed ideas to design and implement an improved, accessible, and user-friendly system for preference cards. The decision was made to leverage the shared, cloud-based platform (**Microsoft Teams**) already being utilized by the hospital for other applications.

Additionally, two surveys were sent to all OR RNs and STs. The first was a baseline to obtain information about card access, barriers, satisfaction, and desired improvements. Results included:

TOP CHALLENGES IDENTIFIED



Implementation

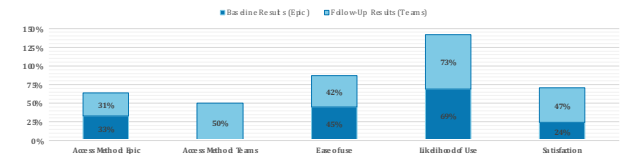
In response to the survey results, we implemented these steps:



Outcome

A post-implementation survey sent to all staff showed an overall improvement. Moving preference cards to Microsoft Teams:

- Improved usability and satisfaction for both nurses and surgical technologists
- Reduced risk of outdated information circulating
- Improved consistency in setup and preparation
- Streamlined updates for team leads
- Strengthened staff readiness for unfamiliar procedures
- Supported onboarding and cross-training with visual resources



Implications for Peri-Op Nursing

Emerging technology offers a key opportunity to increase efficiency, staff preparedness, and overall patient safety. Aligning digital tools with frontline workflow needs will strengthen consistency, communication, and readiness for every case.

To sustain and advance improvements, we recommend:

- **Standardization & Governance** - Implement a universal instruction-card template and Establish quarterly accuracy and content-quality reviews
- **Education & Adoption** - Provide brief in-services and Highlight new features (photos, diagrams, special considerations)
- **Long-Term Vision** - Embed Teams-linked cards into onboarding programs and Monitor workflow outcomes (delays, RISQ reports, turnover times)