

Background

- In our department, there are many nuances to the cardiothoracic case.
- Surgeon writeups and preference cards were not completed on a template or standardized.
- Preference cards most frequently can be viewed through a computer system or in the surgeon's binder (AORN, 2023).
- By analyzing the cost of an item, standardizing and eliminating PRN items, cost reduction is the result (Embick, et al.,2020).
- Preference cards are a common feature in any operating room environment.
- Cards help staff to prepare for the surgery by summarizing the supplies, instrument sets and how the procedure is performed.

Objectives/Purpose

- Vital information is easily shared and accessed.
- Collaboration with supply chain and Epic producers to facilitate elimination of incorrect cards and supplies.
- By using the surgeon's writeups, the preference cards were updated thoroughly. The goal was to standardized write ups for efficiency.
- Many surgeons travel to other hospitals within the system. The SharePoint allows for the team to prepare ahead of time.
- Streamline intraoperative preparation and communication with different services and system hospitals.

Outcomes

- Every surgeon's book now contains a quick reference sheet with idiosyncrasies for emergent cases.
- These sheets include glove size, retractors, cross clamp preference, etc.
- Reduced the need to rely on preference cards alone –checks and balances with preference binders.
- Primary teams and education committee updates them throughout the year. Management can now edit preference cards.
- Enhanced procedural preparedness, improved team communication, reduction setup errors and waste.
- Surgeon's get a chance to edit them for accuracy and fluidity.

Methods

Use of Microsoft SharePoint

- Every surgeon has a folder that can be accessed from the hospital network.
- In July 2024- Preference Cards were examined and unnecessary items were removed. Line by line, items were evaluated and removed or added based on need and appropriateness.
- These files can be shared with anyone in the enterprise.
- Binders were created for every surgeon on our service.
- Surgeon's writeups were standardized for ease of preparation and maintenance.
- New surgeons are initially given a standardized generic template. It is their responsibility to do the initial update of their writeups.
- Preference cards and writeups are reviewed regularly for completeness and accuracy.

Surgeon Idiosyncrasies

Dr.

Pager:

Cell/Office:

Gown Size:

Glove Size:

Trouble Stitches:

Retractor:

Cross Clamp:

Bovie/Aqua:

Cannulas / Cannulation:

Vents / Suction:

Decannulation / Oversews:

PMW

- **Atrial:**
- **Ventricular:**

Hemostatic Agents Allowed:

Chest Tubes:

- **Mediastinal:**
- **Pleural:**

Binder Case Card Example

Department:

Physician:

Procedure:

Suture Pull:

Drawer Pull:

Sets / Extras:

Perfusion Lines:

Procedure:

Conclusion

- When preference cards and write ups are standardized, deviations stand out.
- New staff can experience a standard way of learning.
- Preference cards and surgeon writeups can help to standardize sets, instruments, procedures and supplies.
- Standardization can help reduce cost, eliminate waste and increase workflow reliability.

References

- AORN. (2023). Why do I need preference cards? <https://www.aorn.org/article/why-do-i-need-preference-cards>
- Embick, E., Bieri, M., Koehler, T. J., & Yang, A. (2020). Cost containment: an experience with surgeon education and universal preference cards at two institutions. *Surgical endoscopy*, 3 <https://doi.org/10.1007/s00464-019-07305-9>

Epic Case Card Example

Supplies

Pick Lists Panel 1 - Combined Redo AVR (2) [6451] Total number of pick lists: 1

(!) This pick list is not editable, as it has already been modified in the log.

Ro...	Supply	Open	PRN	Inv Location	Comment	Type	Mfr #	Ch	L	Details
1	BLADE BARD-PARKER	1	0	MC MILL		Blade	3711			
2	CATHETER HYDRAGLI	2	0	MC MILL		Cath	8032			
3	IDN STND MAIN OPEN	1	0	MC MILL		Pack	SCV	ss		
4	DRAPE SURGICAL 23X	1	0	MC MILL		Drape	665			
5	DRESSING PRIMAPOR	4	0	MC MILL		Dres	660			
6	GOWN CONVERTORS	3	0	MC MILL		Gown	9041			
7	COVER BLUE WHITE	2	0	MC MILL		Supply	51300			
8	INSERT FOGARTY HY	0	0	MC MILL		Supply	SOF			
9	PENCIL GOLDLINE UL	0	0	MC MILL		Caut	138			
10	STRAP UNIVERSAL 48	0	1	MC MILL		Supply	316			
11	BAG LAB GUARD THK	1	0	MC MILL		Supply	SBL			
12	BOOTIE STERION STA	1	0	MC MILL		Suture	051			
13	CANNULA SARNS SOF	0	0	MC MILL		Cath	5762			
14	SUTURE PREMICRON	2	0	MC MILL		Suture	M00	ss		
15	WIRE MYOWIRE KEIT	2	0	MC MILL		Supply	025			
16	DRAPE OPTIMA TIBUR	1	0	MC MILL		Drape	7554			
17	COUNTER DEVON XL	2	0	MC MILL		Supply	3114			