**ISIP Manager** allows users to create a secure account for creating and managing surgical preference cards and surgical instrument set count sheets.

**Features of ISIP Manager**

- Use ISIP Manager to create an inventory of your surgical instruments and supplies with password protected access for your surgical and sterile processing staff.

- Use your instrument inventory to create instrument set count sheets which can be printed, emailed or viewed with an Internet browser by staff.

- Use your instrument and item inventory to create surgical preference cards to be printed or viewed via an internet browser by staff.

- When viewing a count sheet in the browser, staff can access individual instrument information. This information includes a photo and lists other sets containing the same instrument in the event an item is broken, missing or dropped. This feature enables staff to quickly locate and replace a sterile item and avoid flash sterilization.

- Make global changes to preference cards and instrument sets. For example, when a surgeon changes glove preference, the change can be made once universally for all his or her preference cards.

- Assign secure password protected "lead" access for staff responsible for creating and maintaining preference cards and count sheets.

- Assign secure password protected "user" access for staff needing to view and print preference cards without the ability to edit, add or delete information.

- Search function for finding individual information about your inventory of instruments and disposable supplies associated with surgical preference cards.

- Professional off site server and database management so your organization doesn’t have to devote resources to provide your own IT staff. All that is needed is an Internet connection and browser.
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Creating Instrument Sets

Step 1. Upload individual instruments to create your inventory from the "Add Instrument" tab.

- Add all desired information including a photo.
- Quantity refers to the total number of the individual instrument owned. It is not possible to add more instruments to your instruments sets than are in your instrument inventory.
- All instruments must be uploaded to your inventory prior to creating instrument set count sheets.
- Tip - name instruments as such "Deaver Retractor, Large". This will make adding instruments to sets easier.
Step 2. Create surgical surgical service.

- Instrument sets are categorized by surgical service.
Step 3. Create your new instrument set.

- Select the surgical service.
- List the name of the set.
- List the location within the department.
- Name a compartment such as the "stringer". Sets may have multiple compartments.
- Type the name of the instrument in the field provided, as you type the first few letters, the corresponding instruments will begin to appear below, with your cursor select the appropriate instrument, then specify the quantity within the set.
- Instruments can not be added to sets that have not been added to your account from the add instruments tab.
- Re-arrange the order of instruments within the compartments by clicking and dragging up or down.
- Click the add button at the bottom of the page to save your set.
Surgical preference cards are a means to convey important information to operating room staff about individual surgical procedures. Prior to creating a preference card, certain items such as procedure, surgeon name, SPD and OR items must be uploaded to your account first. This is advantageous, as OR, SPD item and surgeon details such as location, catalog numbers, glove size and phone numbers will automatically be updated on all of his or her preference cards as these changes are made.
Step 1. Add the procedure to your account.

- If the surgical procedure has not been added do so at the "Add Procedure" tab, this only needs to be done the first time a card is created for a procedure.
Step 2. Add a surgeon.

- If this is the first preference card to be created for a surgeon, the doctor's name first must be added at the "Add Surgeon" tab.
- Select the "Manage Surgeons" tab to see if a surgeon has already been added.
- For easy future reference it is best to add surgeons as "last name, first name".
- The application can search for all cards for a particular surgeon, so it is important to add an individual surgeon only once.
- Surgeon details such as glove size and phone number will automatically be added to all preference cards. When surgeon details are changes these changes will automatically be reflected for all of his or her preference cards.
Step 3. Add OR items.

- OR items are located in the operating room and normally picked by OR staff prior to a procedure.
- Items must be uploaded to your account prior to adding them to a preference card. Therefore when details of an item change or an item is substituted this change will automatically be reflected on all preference cards containing that item.
- OR item quantity refers to the par level of an item in the department.
- OR items only need to be added to your account once and edited as needed in the future.
- "OR Item Quantity" must be greater than the number required on a preference card.
Step 4. Add SPD items.

- Items must be uploaded to your account prior to adding them to a preference card. Therefore when details of an item change or an item is substituted this change will automatically be reflected on all preference cards containing the item.
- SPD item quantity refers to the par level of an item in the department.
- SPD items are normally picked by central processing staff prior to a procedure.
- SPD items only need to be added to your account once and edited as needed in the future.
- "SPD Item Quantity" must be greater than the number required on a preference card.
Step 5. Create the surgical preference card.

- Select the procedure, only procedures added to your account will appear in the drop down list. This will be true for all other drop down menus as well. These items must be added to your account prior to adding them to a preference card.
- Select the surgeon.
- Select the needed instrument set from the drop down menu, select "add more" if additional sets are required.
- The equipment, medication, dressings, prep and position, and scrub and circulator notes fields are all simple text fields. This information is not connected to your account's database as the OR and SPD items are. Any information can be added to these fields and will only be reflected on the individual preference card being created.
For SPD and OR items, type the first few letters of an item, a list of items will appear below
matching the letters typed from the items in your account, click on the desired item.
List a quantity needed for each individual item. Select a quantity of "0" for individual hold
items.
Select the "Add" button at the bottom of the screen to save your preference card.

Levels of Access - Director, Leads and Users

Director - The individual account owner. A director has full access to the account and is able
to add access for leads and users.
Leads - Leads commonly have the task of maintaining account data. They are able to
create, edit, view and print instrument sets and preference cards as well as grant individuals
user level access.
Users - Users can only view and print instrument and preference cards. They do not have
the ability to create or edit any information.
To add "users" or "leads" click on the user tab in the upper right of the application
Printing Preference Cards and Instrument Sheets

- Find the surgeon preference card or instrument set you wish print under the "Manage Preference Cards" or "Manage Instrument Sets" tab.
- To the right of the screen under the "Action" tab, select "PDF"
- Your computer will ask whether to open or save the file. Open the file and select print from the PDF reader menu bar.
- If you wish to email the preference card, save a copy of the PDF to your computer, and then email it as you would any other file.