

**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.

The screenshot shows the 'My ISIP Manager' interface. At the top, there is a navigation bar with 'Welcome director', 'My Account', and 'Logout'. Below this is a menu with 'Instruments', 'Surgical Services', 'Instrument Sets', 'Surgeons', 'Procedures', 'Pick Items', 'Preference Cards', and 'Users'. Under 'Instrument Sets', there are sub-links for 'Manage Instruments' and 'Add Instrument'. The main content area is titled 'Add Instrument' and contains a form with the following fields: 'Instrument Name \*', 'Quantity \*', 'Manufacturer', 'Catalog Number \*', 'Comments', and 'Instrument Picture'. The 'Instrument Picture' field has a 'Browse...' button. At the bottom of the form are 'Add' and 'Cancel' buttons. A note in the top right corner of the form states '\* denotes mandatory fields'.

- 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 instrument 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.

The screenshot shows the 'Add Surgical Service' form in the ISIP Manager application. The header includes 'My ISIP Manager' on the left and 'Welcome director', 'My Account', and 'Logout' on the right. A navigation bar contains 'Instruments', 'Surgical Services', 'Instrument Sets', 'Surgeons', 'Procedures', 'Pick Items', 'Preference Cards', and 'Users'. Below the navigation bar, there are links for 'Manage Surgical Services' and 'Add Surgical Service'. The main content area is titled 'Add Surgical Service' and contains a form with a single input field labeled 'Surgical Service Name\*'. A legend indicates that an asterisk denotes mandatory fields. Below the input field are two buttons: 'Add' (green) and 'Cancel' (grey).

- Instrument sets are categorized by surgical service.

The screenshot shows the 'Manage Surgical Service' table in the ISIP Manager application. The header includes 'My ISIP Manager' on the left and 'Welcome director', 'My Account', and 'Logout' on the right. A navigation bar contains 'Instruments', 'Surgical Services', 'Instrument Sets', 'Surgeons', 'Procedures', 'Pick Items', 'Preference Cards', and 'Users'. Below the navigation bar, there are links for 'Manage Surgical Services' and 'Add Surgical Service'. The main content area is titled 'Manage Surgical Service' and contains a table with the following data:

Surgical Service Name ↕	Action
ENT	<a href="#">Edit</a> / <a href="#">Delete</a>
General	<a href="#">Edit</a> / <a href="#">Delete</a>
Neuro	<a href="#">Edit</a> / <a href="#">Delete</a>
Orthopedic	<a href="#">Edit</a> / <a href="#">Delete</a>
Plastics	<a href="#">Edit</a> / <a href="#">Delete</a>
Vascular	<a href="#">Edit</a> / <a href="#">Delete</a>

Below the table, there is a pagination control showing 'Page 1 of 1' and a dropdown menu set to '50'. The text 'View 1 - 6 of 6' is also visible.

## Step 3. Create your new instrument set.

The screenshot shows the 'Add Instrument Set' form in the ISIP Manager application. The form is titled 'Add Instrument Set' and has a navigation bar at the top with 'My ISIP Manager' and user information. The form includes the following fields and elements:

- Surgical Service \***: A dropdown menu with the text '--select surgical service--'.
- Set Name \***: A text input field.
- Location \***: A text input field.
- Compartment Name \***: A text input field with a red 'X' icon next to it.
- Instruments**: A section with the instruction 'Drag and drop the instrument at desired position to rearrange within this compartment'. It contains a text input field for the instrument name, a 'Qty' input field, and a red 'X' icon next to it.
- Add More**: A link to add more instruments to the compartment.
- Add another compartment**: A link to add another compartment.
- Add**: A green button to save the set.
- Reset**: A grey button to reset the form.

- 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.

# Creating Surgical Preference Cards

The screenshot shows the 'Add Preference Card' form in the ISIP Manager application. The form is titled 'Add Preference Card' and includes a navigation bar at the top with tabs for Instruments, Surgical Services, Instrument Sets, Surgeons, Procedures, Pick Items, Preference Cards, and Users. Below the navigation bar, there are links for 'Manage Preference Cards' and 'Add Preference Card'. The form itself contains the following fields and controls:

- Procedure Name\***: A dropdown menu.
- Surgeon Name\***: A dropdown menu.
- Instrument Set Name\***: A text input field with a red 'X' icon next to it.
- Equipments\***: A large text area with a vertical ellipsis icon on the right.
- SPD Items**: A text input field followed by 'Qty' and another text input field, with a red 'X' icon next to the quantity field.
- OR Items Name**: A text input field followed by 'Qty' and another text input field, with a red 'X' icon next to the quantity field.
- Medication**: A large text area with a vertical ellipsis icon on the right.
- Dressings**: A large text area with a vertical ellipsis icon on the right.
- Prep and Position**: A large text area with a vertical ellipsis icon on the right.
- Scrub and circular notes**: A large text area with a vertical ellipsis icon on the right.

At the bottom of the form, there are two buttons: 'Add' (green) and 'Cancel' (grey). A note in the top right corner states '\* denotes mandatory fields'.

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.

The screenshot shows the 'My ISIP Manager' web interface. At the top, there is a navigation bar with the title 'My ISIP Manager' on the left and 'Welcome director', 'My Account', and 'Logout' on the right. Below this is a menu bar with tabs for 'Instruments', 'Surgical Services', 'Instrument Sets', 'Surgeons', 'Procedures', 'Pick Items', 'Preference Cards', and 'Users'. The 'Procedures' tab is currently selected. Underneath the menu bar, there is a sub-menu with 'Manage Procedures' and 'Add Procedure'. The 'Add Procedure' option is highlighted in green. The main content area is titled 'Add Procedure' and contains a form with a single input field labeled 'Procedure Name \*'. A red asterisk next to the label indicates that this field is mandatory. To the right of the input field, there is a small red asterisk icon followed by the text '\* denotes mandatory fields'. Below the input field are two buttons: a green 'Add' button and a grey 'Cancel' button.

- 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.

The screenshot shows the 'Add Surgeon' form within the 'My ISIP Manager' application. The navigation bar includes 'Instruments', 'Surgical Services', 'Instrument Sets', 'Surgeons', 'Procedures', 'Pick Items', 'Preference Cards', and 'Users'. The 'Surgeons' tab is active, and the 'Add Surgeon' link is highlighted. The form itself is titled 'Add Surgeon' and contains the following fields:

- Surgeon Name \*
- Gloves \*
- Pager Number#
- Office Phone Number#

At the bottom of the form are two buttons: 'Add' (green) and 'Cancel' (grey). A legend in the top right corner indicates that an asterisk (\*) denotes mandatory fields.

- 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.

The screenshot shows the 'Add OR Pick Item' form within the 'My ISIP Manager' application. The top navigation bar includes 'Welcome director', 'My Account', and 'Logout'. Below the navigation bar, there are tabs for 'Instruments', 'Surgical Services', 'Instrument Sets', 'Surgeons', 'Procedures', 'Pick Items', 'Preference Cards', and 'Users'. The 'Pick Items' tab is active, and the sub-menu shows 'Manage SPD Pick Items', 'Add SPD Pick Items', 'Manage OR Pick Items', and 'Add OR Pick Items' (highlighted in green).

The form title is 'Add OR Pick Item'. A note on the right side of the form states '\* denotes mandatory fields'. The form contains four input fields, each with a red asterisk indicating it is mandatory:

- OR Item Name \*
- OR Item Catalog# \*
- OR Item Location \*
- OR Item Quantity \*

At the bottom of the form, there are two buttons: a green 'Add' button and a grey 'Cancel' button.

- 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.

The screenshot shows the 'My ISIP Manager' web application interface. At the top, there is a navigation bar with the title 'My ISIP Manager' and user information: 'Welcome director', 'My Account', and 'Logout'. Below this is a menu bar with tabs for 'Instruments', 'Surgical Services', 'Instrument Sets', 'Surgeons', 'Procedures', 'Pick Items', 'Preference Cards', and 'Users'. The 'Pick Items' tab is currently selected. Underneath the menu bar, there are four links: 'Manage SPD Pick Items', 'Add SPD Pick Items', 'Manage OR Pick Items', and 'Add OR Pick Items'. The 'Add OR Pick Items' link is highlighted in green. The main content area is titled 'Add OR Pick Item'. It contains four text input fields, each with a red asterisk indicating it is mandatory: 'OR Item Name \*', 'OR Item Catalog# \*', 'OR Item Location \*', and 'OR Item Quantity \*'. A legend in the top right corner states '\* denotes mandatory fields'. At the bottom of the form are two buttons: a green 'Add' button and a grey 'Cancel' button.

- 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.

The screenshot shows the 'Add Preference Card' form with the following fields and controls:

- Procedure Name\***: A dropdown menu.
- Surgeon Name\***: A dropdown menu.
- Instrument Set Name\***: A text input field with a red 'X' icon and an 'Add More' link.
- Equipments\***: A large text area with a vertical ellipsis icon.
- SPD Items**: A text input field followed by a 'Qty' input field and a red 'X' icon, with an 'Add More' link.
- OR Items Name**: A text input field followed by a 'Qty' input field and a red 'X' icon, with an 'Add More' link.
- Medication**: A large text area with a vertical ellipsis icon.
- Dressings**: A large text area with a vertical ellipsis icon.
- Prep and Position**: A large text area with a vertical ellipsis icon.
- Scrub and circular notes**: A large text area with a vertical ellipsis icon.
- Buttons**: 'Add' (green) and 'Cancel' (grey) buttons at the bottom.
- Note**: '\* denotes mandatory fields' in the top right corner.

- 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

Manage Preference Card

Procedure Name: All (Searches in Procedure name)

Surgeon Name: All (Searches in Surgeon name)

Search

Surgeon Name	Procedure Name	Action
Dr John Smith	Hip . Open Reduction Internal Fixation	<a href="#">Edit</a>   <a href="#">View</a>   <a href="#">PDF</a>   <a href="#">Delete</a>   <a href="#">Copy this card</a>
Dr John Smith	Lap Chole	<a href="#">Edit</a>   <a href="#">View</a>   <a href="#">PDF</a>   <a href="#">Delete</a>   <a href="#">Copy this card</a>
John Rogers	Insertion of BiVentricular Cardio Defibrillator and Lead System	<a href="#">Edit</a>   <a href="#">View</a>   <a href="#">PDF</a>   <a href="#">Delete</a>   <a href="#">Copy this card</a>
Mark Takata	Inguinal Hernia Repair . Open	<a href="#">Edit</a>   <a href="#">View</a>   <a href="#">PDF</a>   <a href="#">Delete</a>   <a href="#">Copy this card</a>
Dr John Smith	Hip . Open Reduction Internal Fixation	<a href="#">Edit</a>   <a href="#">View</a>   <a href="#">PDF</a>   <a href="#">Delete</a>   <a href="#">Copy this card</a>

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- 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.