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INSTRUCTIONS FOR CREATING AND USING BASELINE FOOTPRINTS

I. BASIC ASSUMPTIONS

- Inventory orders - for a particular surgeon at a given facility - are dynamically generated based on actual usage previously submitted. The software returns the last used as well as common (frequently occurring) inventory orders.
- In addition, we have enhanced the website to include multiple baseline footprints, or standards, always available, for repeated inventory orders for a particular surgeon at a given facility. The dropdown, which displays the baseline footprints that you created, is ordered by usage count. Thus, the footprints that you most often select will be highest in the list of choices.

Instructions for creating and utilizing baseline footprints are as follows:

II. CREATING BASELINE FOOTPRINTS

1. Login and select Schedule.
2. Click on the Surgeons button. You will see all surgeons associated with your team/location. You can sort them in whatever manner you desire.
3. Select a surgeon and click on the Add Baseline Footprint or Edit Baseline Footprint(s) link.

NOTE: You will know that you are in the baseline footprint definition screen, as opposed to the standard inventory selection screen, from the large blue bar defining the surgeon and facility.

4. Name your baseline footprint.
5. Select the inventory items.
6. Enter a note, if needed.
7. Click the Save Baseline Footprint and Return button.
8. You will then go to the Existing Baseline Footprints screen. On it, you can add another footprint, and edit or delete any footprint previously created.

III. USING A BASELINE FOOTPRINT

1. Once a surgery is scheduled for the given surgeon at the facility, you will see, on the inventory selection screen, baseline footprint choices on the left side.
2. If you only have one footprint, it will be displayed with a button. However, if you have multiple footprints, you will be presented with a dropdown menu of choices, ordered by usage, from which to make your selection. Notice how, as you make a choice from the dropdown menu, the inventory items displayed are refreshed to match your choice. Click on the footprint that you wish to use.
3. Add or delete any inventory items, and save the inventory order as you normally do. Good luck!