

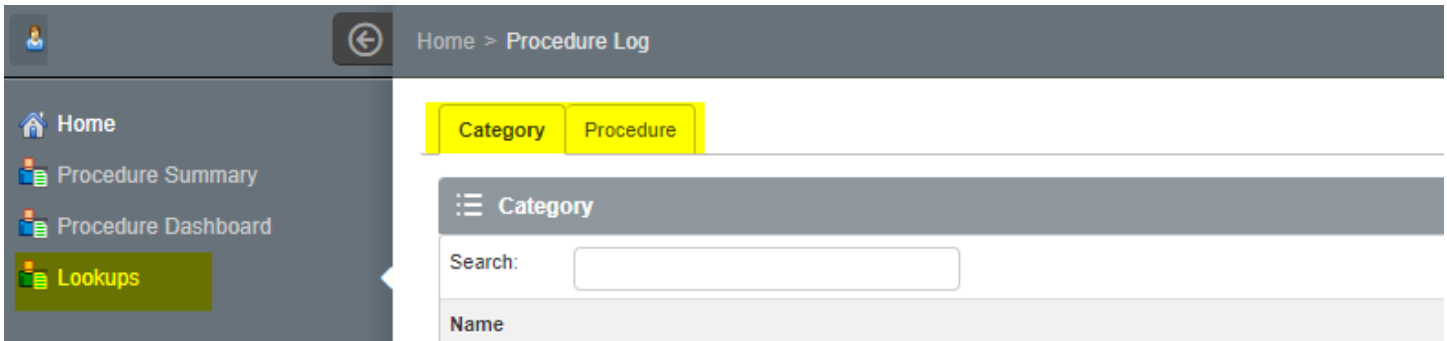
USER GUIDE – HOW TO ADD A NEW PROCEDURE OR CATEGORY

TARGET AUDIENCE: PROGRAM ADMINISTRATORS

Updated July 7, 2021

Look Up Tables

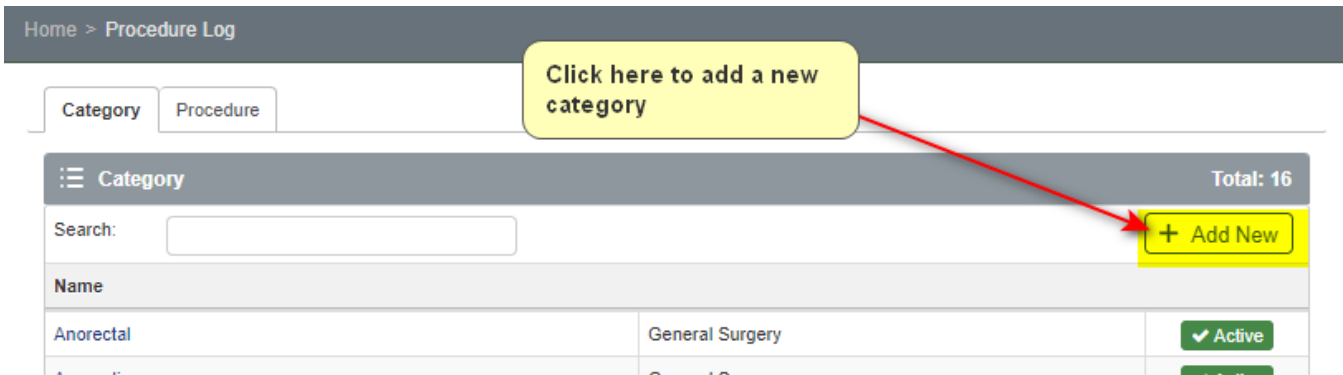
There are two look up tables under the Procedure Log – **Category** and **Procedure**. A Category must exist before a new procedure can be added within it.



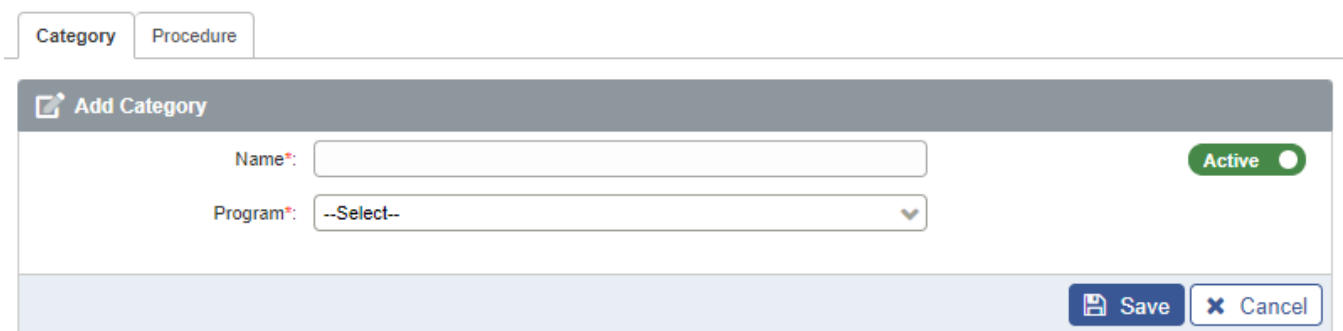
Adding A New Category

Click on “+ Add New” to create a new category.

Note: Use the search feature to ensure the category does not already exist before creating it.

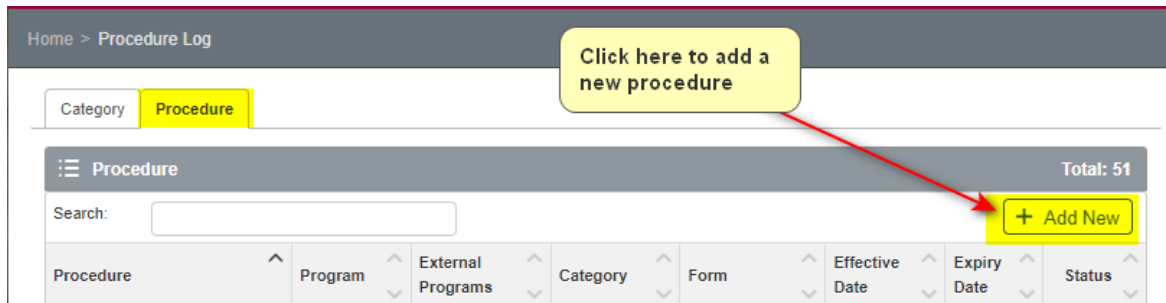


Enter the name of the category as well as the Program it belongs to and click Save:



Adding A New Procedure

Click on “+ Add New” to create a new procedure under the “Procedure” tab:



Enter the following details:

The 'Add Procedure' form contains the following fields and controls:

- Procedure*:** Text input field.
- Program*:** Dropdown menu with "--Select--" selected.
- External Programs:** Dropdown menu with "--Select--" selected.
- Category*:** Dropdown menu with "--Select--" selected.
- Form*:** Dropdown menu with "--Select--" selected.
- Effective Date*:** Date input field.
- Expiry Date*:** Date input field.
- Supervisor Sign Off:** Radio button set with "NO" selected.
- Active:** Toggle switch currently turned on.
- Buttons:** "Save" and "Cancel" buttons at the bottom right.

- **PROCEDURE** – name of the procedure
- **PROGRAM** – program that the procedure belongs to
- **EXTERNAL PROGRAMS**– choose the programs that may have learners completing your programs procedure logs (ex. General Surgery learners complete Plastic Surgery’s procedures when they are on a plastic surgery rotation). Note that this is only used for certain programs.
- **CATEGORY** – choose the category that the procedure falls under
- **FORM** – choose the default form for your program
- **EFFECTIVE DATE** – choose the date that you would like the procedure to be available on
- **EXPIRY DATE** – choose the date that you want the activity to expire. Note: default is June 30 2030.
- **SUPERVISOR SIGN OFF** – choose “yes” if you want the ability for a supervisor to sign off on the procedure. Choose “no” if the procedure will never require supervisor sign off.

NOTE: If you select “no”, this means that if a learner does enter a supervisor’s name, the procedure will still be self reported with the supervisor’s name tracked for reporting purposes.

Edit An Existing Procedure

To edit an existing procedure, select the procedure name in blue:

Category Procedure

| Procedure | | | | | | | | Total: 51 |
|--|-----------------|-------------------|----------|-------------------------|----------------|-------------|--------|-----------|
| Procedure | Program | External Programs | Category | Form | Effective Date | Expiry Date | Status | |
| Access (Open or Endovascular) | General Surgery | | Vascular | Procedure Log - Surgery | 01-Jul-2021 | 30-Jun-2030 | Active | |
| Anastomosis, Endarterectomy, or Repair | General Surgery | | Vascular | Procedure Log - Surgery | 01-Jul-2021 | 30-Jun-2030 | Active | |
| Appendectomy | General Surgery | | Appendix | Procedure Log - Surgery | 01-Jul-2021 | 30-Jun-2030 | Active | |
| Artery (A.M.P. or S.M.P.) | General | | Breast | Procedure Log | 01-Jul-2021 | 30-Jun-2030 | Active | |

QUESTIONS?

If you have any questions or difficulties with this process, please contact MedSIS at medsis@mcmaster.ca