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Using SA RecordViewer

SurgiNet Anesthesia (SA) RecordViewer provides several reports which are useful for managing the anesthesia department and ensuring that documentation has been completed.

Accessing SA RecordViewer

To access the SA RecordViewer application:

1. Log in to iCentra.
2. Double-click the SA RecordViewer icon. 
3. Enter your Username and Password, and click OK. The SA RecordViewer application opens.

Viewing Concurrency Reports

SurgiNet Anesthesia allows you to define the ratio limits of providers to cases to comply with federal, state, local and facility-specific regulations and standards of care. SurgiNet Anesthesia Record Viewer allows you to view these concurrency reports.

To view providers currently supervising cases and how many cases they are supervising:

1. With the SA RecordViewer application open, click Concurrency in the All Panels list (see Figure 1, below).
2. (Optional) Select a Provider in the providers list. All cases that provider currently is supervising are displayed in the records list.
3. To view case details, select a case and double-click it to view that record's details.
4. To end the provider’s attendance of a case, right-click the record in the providers list and select Open for Documentation to open SurgiNet Anesthesia. You also can open the record in read-only or remote view in SurgiNet Anesthesia from the context menu.
5. Select the case in the records list to select that case’s timeline in the timeline box. Arrows displayed in the timeline indicate the case is ongoing. The color of the timeline indicates concurrency alerts.
   - Green indicates the provider is more than one case away from the maximum concurrency limit.
   - Yellow indicates the provider is one case away from the maximum concurrency limit
   - Red indicates a provider at the maximum concurrency limit.
6. You can scroll through the timeline displayed.

7. To print the report, click the Print Concurrency icon. To print the concurrency summary report, click the Concurrency Report icon.

**Viewing Billing Summaries**

You can view and print a Billing Summary report for a selected case. This report pulls information from various sources in iCentra and provides you with the ability to collect billing information required to complete the CMS-1500 form.

**To view the billing summary for a case from the Billing Summary Panel:**

1. With the SA RecordViewer application open, click Billing Summary in the All Panels list.
2. Select the case Created Date or date range to filter the list for cases created on that date or within the specified date range (see Figure 2, below).

   **Figure 2: Case Creation Date**

   ![Filtering cases by date](image)

3. Select the Anesthesiologist, Document Type, and Surgical Area to filter anesthesia records in the Billing Summary records list (see Figure 3, below).

   **Figure 3: Filters List**

   ![Filtering anesthesia records](image)

4. Select the record in the Billing Summary records list you want to view. The Anesthesia Billing Summary report displays below the Billing Summary record list (see Figure 4, on the following page).
5. To view the billing summary for the selected case, click the **Billing/Summary Record** icon in the lower right corner of the application.

6. To print the billing summary for a single record, click the printer icon in the top right corner of the application.

**To view a Billing Summary report and Anesthesia Record from the Finalized Cases panel:**

1. With the SA RecordViewer application open, click **Finalized Cases** in the All Panels list.
2. Select the case **Finalized Date** or date range to filter the list for cases finalized on that date or within the number of days range.
3. Select the **Document Type** and **Surgical Area** to filter anesthesia records in the Finalized Cases records list (see Figure 5, on the following page).
4. Select the record in the Finalized Cases record list you want view.

5. To view the billing summary for the selected case, click the **Billing/Summary Record** icon in the lower right corner of the application.

6. To print the billing summary or anesthesia record, click the printer icon in the top right corner of the application.

**To batch print Billing Summaries:**

1. With the SA RecordViewer application open, click **Billing Summary** in the All Panels list.

2. Click the **Batch Print Summary/Records** icon in the top right corner of the application; the **Batch Print** window displays (see Figure 6, below).

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**Figure 5: Document Type and Surgical Area Filters**

![Document Type and Surgical Area Filters](image1)

**Figure 6: Batch Print Window**

![Batch Print Window](image2)
3. Select if you want to print **Billing Summaries** or **Anesthesia Records** (or both) by clicking the appropriate box.

4. Filter the batch of records you want to print by **Created Date**, **Anesthesiologist**, **Document Types**, **Surgical Areas**, or whether to include **Discrepant Records**.

5. Click **Print**.

**Viewing Discrepancies**

You can view discrepant information between the anesthesia record and the surgery record for a patient in SA Record Viewer. The report is displayed in spreadsheet format with an indicator displayed for discrepant information. It is imperative these discrepancies are resolved or validated for continuity of care between anesthesia and surgery. You can resolve the documentation discrepancies by opening SurgiNet Anesthesia directly from the report.

**To review discrepancies:**

1. With the SA Record Viewer application open, click **Discrepancies** in the All Panels list.
2. You will now enter a date range in the **Surgery Date** section.
   a. To use the calendar to select a range:
      i. Click the **Select Date** icon.
      ii. Click the beginning date of the range, press **SHIFT**, and click the end date of the range, then press **ENTER**.
   b. To use the number of days box, select the **In the last <X> Days** option and enter a value in the box.
3. Select the **Document Type** and **Surgical Area** to filter anesthesia records in the Discrepancies records list.
4. Click **Save** to save your changes and add them to the report.
5. All anesthesia records that have a discrepancy with the surgery record are displayed in the Discrepancies list.
6. Select the record from the Discrepancies list and the discrepancies are displayed in spreadsheet format in the results list.
   a. To expand the lists, click the plus (+) icon to view the details in that list.
   b. Any discrepant information is highlighted in **red** and indicated by an exclamation point (!).
   c. The Case Times list contains times that are on both the anesthesia record and the surgery record.
   d. The Single Case Times list contains times that are only on either the anesthesia record or surgery record.
7. To resolve the discrepant information in the record, right-click the record in the Discrepancies list and select **Open for Documentation** to open SurgiNet Anesthesia. You also can open the record in read-only or remote view in SurgiNet Anesthesia from the context menu.
8. To print the Discrepancy Report, click the **Discrepancy Report** icon; the **Discrepancy Report** dialog box appears (see Figure 7, on the following page).
Figure 7: Discrepancy Report Dialog Box

a. To preview the report, click the **Preview** button on the Discrepancy Report dialog box.
b. To print the report, click the **Print** button in the *Discrepancy Report* dialog box.

to refresh the discrepancy report with the most recent information, click **Refresh All** on the toolbar.

**Viewing Finalized Cases**
You can view all finalized cases in SA Record Viewer that meet the filter criteria that you select.

**To monitor finalized cases:**

1. With the SA RecordViewer application open, click **Finalized Cases** in the All Panels list.
   a. To view all finalized cases in the system, select the **Not Filtered** option.
   b. To view finalized cases over a date range select the **In the last <X> Days** option and enter a value in the box.
2. Select the **Document Types** and **Surgical Area** to filter anesthesia records in the Finalized records list.
3. Click **Save** to save your changes and add the cases to the report. All finalized cases that match the filter criteria are displayed in the Finalized Cases list.
4. Select the case from the Finalized Cases list and the case details are displayed in spreadsheet format.
   a. To expand the list, click the plus (+) button to view the details in that list.
5. To view more information on the finalized case, right-click the case in the Finalized Cases list and select **Open for Documentation** to open SurgiNet Anesthesia. You also can open the record in read-only or remote view in SurgiNet Anesthesia from the context menu.
6. To print the report, click the **Print Finalized Cases** icon.

**Viewing Open Cases**
You can view all open cases in SurgiNet Anesthesia Record Viewer that match the filter criteria you select.

**To view open cases:**

1. With the SA RecordViewer application open, click **Open Cases** in the All Panels list.
   a. To view all open cases in the system, select the **Not Filtered** option.
   b. To view finalized cases over a date range select the **In the last <X> Days** option and enter a value in the box, or select the **Older Than <X> Days** option and enter a value in the box.
2. To view open cases created in a specific OR:
   a. Click the Select Operating Room button on the Created In field to open the Select Operating Room dialog box (see Figure 8, below).

   ![Select Operating Room Dialog Box](image)

   b. Select the OR and click OK to add the OR to the Created In list.

3. To view cases Created By specific providers:
   a. Click the binoculars icon on the Created By field to open the Provider Selection dialog box (see Figure 9, on the following page).
b. Enter the name of the provider and click **Search**.

c. Select the provider and click **OK**.

d. Click the green **plus** icon to add the provider to the **Created By** list.

4. To view cases **Opened By** specific providers:
   a. Click the binoculars icon on the **Opened By** field to open the **Provider Selection** dialog box.
   b. Enter the name of the provider and click **Search**.
   c. Select the provider and click **OK**.

d. Click the green **plus** icon to add the provider to the **Opened By** list.

5. Select the **Document Types** and **Surgical Area** to filter anesthesia records in the Open Cases list.

6. Click **Save** to save your changes and add the cases to the report. All open cases that match the filter criteria are displayed in the Open Cases list.
7. Select the case from the Open Cases list and the case details are displayed in spreadsheet format.
   a. To expand the lists, click the plus (+) button to view the details in that list.

8. To view more information on the open case, right-click the case in the Open Cases list and select Open for Documentation to open SurgiNet Anesthesia. You also can open the record in read-only or remote view in SurgiNet Anesthesia from the context menu.

9. To print the report, click the Print Open Cases icon.

**Viewing Unassociated Records**

You can view all blank records that have not been associated to a surgical case in SurgiNet Anesthesia Record Viewer using various filtering methods or in a comprehensive list.

**To view unassociated records:**

1. With the SA RecordViewer application open, Click Unassociated Records in the All Panels list.
   a. To view all open cases in the system, select the Not Filtered option.
   b. To view finalized cases over a date range select the In the last <X> Days option and enter a value in the box, or select the Older Than <X> Days option and enter a value in the box.

2. To view unassociated records created in a specific OR:
   a. Click the Select Operating Room button on the Created In field to open the Select Operating Room dialog box.
   b. Select the OR and click OK to add the OR to the Created In list.

3. To view cases Created By specific providers:
   a. Click the binoculars icon on the Created By field to open the Provider Selection dialog box.
   b. Enter the name of the provider and click Search.
   c. Select the provider and click OK.
   d. Click the green plus icon to add the provider to the Created By list.

4. To view cases Opened By specific providers:
   a. Click the binoculars icon on the Opened By field to open the Provider Selection dialog box.
   b. Enter the name of the provider and click Search.
   c. Select the provider and click OK.
   d. Click the green plus icon to add the provider to the Opened By list.

5. Select the Document Types and Surgical Area to filter records in the Unassociated Records list.

6. Click Save to save your changes and add the cases to the report. All unassociated records that match the filter criteria are displayed in the Unassociated Records list.

7. Select the record from the Unassociated Records list; record details are displayed in spreadsheet format.
   a. To expand the lists, click the plus (+) to view the details in that list.

8. To view more information on the record, right-click the record in the Unassociated Records list and select Open for Documentation to open SurgiNet Anesthesia. You also can open the record in read-only or remote view in SurgiNet Anesthesia from the context menu.

9. To print the report, click the Print Unassociated Records icon.
Viewing Unfinalized Cases

You can view all unfinalized cases in SurgiNet Anesthesia Record Viewer using various filtering methods or in a comprehensive list.

To monitor unfinalized cases:

1. With the SA RecordViewer application open, click Unfinalized Cases in the All Panels list.
   a. To view all unfinalized cases in the system, select the Not Filtered option.
   b. To view finalized cases over a date range:
      i. Select the In the last <X> Days option and enter a value in the box
      ii. Select the Older Than <X> Days option and enter a value in the box.
      iii. Select a Start and End date in the Surgery Date group box.
      Tip: You can select the Use Today option to use the current date as either the Start or End date.
2. To view unfinalized records created in a specific OR:
   a. Click the Select Operating Room button on the Created In field to open the Select Operating Room dialog box.
   b. Select the OR and click OK to add the OR to the Created In list.
3. To view cases Created By specific providers:
   a. Click the binoculars icon on the Created By field to open the Provider Selection dialog box.
   b. Enter the name of the provider and click Search.
   c. Select the provider and click OK.
   d. Click the green plus (+) icon to add the provider to the Created By list.
4. To view cases Opened By specific providers:
   a. Click the binoculars icon on the Opened By field to open the Provider Selection dialog box.
   b. Enter the name of the provider and click Search.
   c. Select the provider and click OK.
   d. Click the green plus (+) icon to add the provider to the Opened By list.
5. Select the Document Types and Surgical Area to filter anesthesia records in the Unfinalized Records list.
6. Click Save to save your changes and add the cases to the report. All unfinalized records that match the filter criteria are displayed in the Unfinalized Records list.
7. Select the case from the Unfinalized Cases list and the case details are displayed in spreadsheet format. To expand the lists, click the plus (+) button to view the details in that list.
8. To view more information on the record, right-click the record in the Unfinalized Cases list and select Open for Documentation to open SurgiNet Anesthesia. You also can open the record in read-only or remote view in SurgiNet Anesthesia from the context menu.
9. To print the report, click the Print Unfinalized Cases icon.
**Viewing Unsynchronized Records**

You can view all unsynchronized records that were documented in disconnected mode and have not been synchronized in SurgiNet Anesthesia Record Viewer.

**To view unsynchronized cases:**

1. With the SA RecordViewer application open, click **Unsynchronized Records** in the All Panels list to add the cases to the report.
2. To view more information on the record and synchronize the record with the respective room, right-click the record in the Unsynchronized Records list and select **Open for Documentation** to open SurgiNet Anesthesia. You also can open the record in read-only or remote view in SurgiNet Anesthesia from the context menu.
3. To print the report, click the **Print Unsynchronized Records** icon.