

PREFERENCE CARD OPTIMIZATION CAMPAIGN

TERMINOLOGY GUIDE

This guide defines key terms used throughout the Preference Card Optimization Campaign. Because language varies across institutions, each term below includes a working definition, how it is used for the purposes of this campaign, and examples of what it may look like in practice.

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Preference Cards

Often called procedure cards, preference cards are surgeon- or procedure-specific documents that list the supplies, instruments, equipment, medications, positioning needs, and other resources typically required for a surgical case.

For this campaign, “preference cards” refers to the cards or lists used by surgical teams to prepare for a case. This may include items that are opened before the case begins, items that are pulled but not opened unless needed, and any case-specific set-up instructions.

Examples may include:

- Surgeon-specific preference cards
- Procedure-specific preference cards
- Case setup cards
- Procedure cards
- Pick lists, if used locally to guide case preparation

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Tray Optimization

Tray optimization is the process of reviewing and updating surgical instrument trays to ensure they contain the instruments that are actually needed and used for a procedure.

For this campaign, “tray optimization” refers to efforts to reduce unused or rarely used instruments from trays, standardize tray content when appropriate, and improve the efficiency of tray assembly, sterilization, storage, and operating room setup.

Examples may include:

- Removing instruments that are rarely or never used
- Moving infrequently used instruments to peel packs or backup trays
- Standardizing tray contents across similar procedures
- Reducing the total number of trays opened for a case
- Reviewing instrument use with surgeons, nurses, scrub techs, and sterile processing staff

Example of Mastectomy Tray Optimization: Five breast surgical oncologists met to discuss what instruments could be removed from the mastectomy general tray in order to reduce instrument processing and optimize surgical sustainability. Highlighted line items indicate instruments that were removed from the tray, some of which were changed to peel packs for individual surgeon preferences. The meeting took place over 1.5 hours with nursing and scrub tech leads, resulting in a 25% reduction of instruments within the mastectomy general tray.

QTY	IP CNT	QTY MI	OR CNT	DESCRIPTION	VENDOR	CATALOG	CRITICAL	PLACEMENT	Comment
4-Apr	4	0	0	STRINGER					
6-Jan	6	0	0	CLAMP, TOWEL, NON-PERFORATING, 5 1/4"	V Mueller	SU2938		STRINGER	
2-Feb	2	0	0	CLAMP MOSQUITO, CVD, 5"	V Mueller	SU2702		STRINGER	remove 2 of these
8-Aug	8	0	0	CLAMP MOSQUITO, STRAIGHT, 5"	V Mueller	SU2700		STRINGER	remove both
4-Apr	4	0	0	CLAMP ADAIR, 7 1/2"	V Mueller	GL885		STRINGER	
2-Feb	2	0	0	CURVED HEMOSTATS, KELLY, 6 1/4"	V Mueller	SU2737		STRINGER	
2-Feb	2	0	0	CLAMP KELLY, CURVED, 8"	V Mueller	SA2764		STRINGER	
2-Feb	2	0	0	CLAMP KOCHER, STRAIGHT, 5 1/2"	V Mueller	SA2790		STRINGER	
4-Apr	4	0	0	FORCEPS, ALLIS, 4X5 TEETH, 6"	V Mueller	SU4054		STRINGER	
2-Feb	2	0	0	CLAMP BABCOCK, 6"	V Mueller	SA5000		STRINGER	
1-Jan	1	0	0	CLAMP CARMALT ART. CVD 6-1/4"	V Mueller	SU2775		STRINGER	
2-Feb	2	0	0	CLAMP CARMALT, 8", CURVED	V Mueller	SU2777		STRINGER	remove/ make peel pack available
2-Feb	2	0	0	BABY-ADSON FORCEPS, RIGHT ANGLE, 5 1/2"	Aesculap	B1013R		STRINGER	
2-Feb	2	0	0	Baby Adson Clamp 7" Rt Angle	Aesculap	B1014R		STRINGER	
2-Feb	2	0	0	RIGHT ANGLE FORCEPS, 7-1/2IN	Walzer Lorenz	21-0064		STRINGER	
2-Feb	2	0	0	CLAMP SAWTELL TONSIL, FULL CURVE, 7 1/2"	V Mueller	MO1710		STRINGER	
2-Feb	2	0	0	CLAMP SHALLCROSS, 6", FULL CURVE	V Mueller	SU10510		STRINGER	
2-Feb	2	0	0	SPONGE STICK, STRAIGHT, 9 3/4"	V Mueller	GL650		STRINGER	remove/ make peel pack available
2-Feb	2	0	0	NEEDLE HOLDER, CRILE WOOD, 6", TC INSERTS	V Mueller	SU16005		STRINGER	
2-Feb	2	0	0	NEEDLE HOLDER, MAYO HEGAR, 7 1/4", TC INSERTS	V Mueller	SU16001		STRINGER	
1-Jan	1	0	0	VITAL DEF EYE NEEDLE HOLDER, 4 3/4"	V Mueller	OP7512		STRINGER	
2-Feb	2	0	0	SCISSORS, LILLIE, CURVED, 8"	V Mueller	MO1620		STRINGER	remove both/ make peel pack available
2-Feb	2	0	0	SCISSORS, METZ, CURVED, BLUNT/BLUNT, 7", TC INSERTS	V Mueller	MO1601		STRINGER	
1-Jan	1	0	0	SCISSORS, FACELIFT, CURVED	Snowden	32-5994		STRINGER	
1-Jan	1	0	0	SCISSORS, MAYO, STR, 6 3/4"	V Mueller	SU1801		STRINGER	
1-Jan	1	0	0	SCISSORS, MAYO, 6 3/4", CURVED	V Mueller	SU1811		STRINGER	
1-Jan	1	0	0	SCISSORS, JONES DISSECTING, 5 1/2", CURVED	V Mueller	SU1922		STRINGER	
0/1	0	1	1	SCISSOR, KNAPP IRIS, STRAIGHT, SHARP/SHARP, 4 1/2"	V Mueller	OP5526		STRINGER	remove/ make peel pack available
0/1	0	1	1	SCISSOR, KNAPP IRIS, SHARP/SHARP, CURVED, 4 1/2"	V Mueller	OP5525		STRINGER	
2-Feb	2	0	0	APPLIER, HEMOCLIP, HORIZON, SMALL, 5" (RED)	Pilling		137062	STRINGER	
2-Feb	2	0	0	APPLIER, HEMOCLIP, HORIZON, MEDIUM, 8" (BLUE)	Pilling		237061	STRINGER	
66/66				Subtotal for STRINGER					
				BOTTOM TRAY					
2-Feb	2	0	0	RETRACTOR, ARMY NAVY, 8IN	V Mueller	SU3660		BOTTOM TRAY	
2-Feb	2	0	0	RETRACTOR, APPENDICEAL	Jent	202-160		BOTTOM TRAY	
1-Jan	1	0	0	RETRACTOR, HARRINGTON SPLANCHNIC, 2 1/2" X 5", 12 1/2", (SWEETHEART)	V Mueller	CH1005		BOTTOM TRAY	
1-Jan	1	0	0	RETRACTOR, HARRINGTON PEMBERTON, 2 1/2" X 7 1/2" X 14 1/2"	V Mueller	CH1010		BOTTOM TRAY	
1-Jan	1	0	0	(SWEETHEART)	V Mueller	CH1010		BOTTOM TRAY	
1-Jan	1	0	0	RETRACTOR, RICHARDSON, 1" X 3/4", 9 1/4"	V Mueller	SU3470		BOTTOM TRAY	
1-Jan	1	0	0	RETRACTOR, RICHARDSON, 1.5" X 1.5" X 9 1/4"	V Mueller	SU3474		BOTTOM TRAY	
1-Jan	1	0	0	RETRACTOR, RICHARDSON, 3" X 2 1/2", 11"	V Mueller	SU3464		BOTTOM TRAY	
1-Jan	1	0	0	RETRACTOR, EASTMAN, DOUBLE-ENDED, SMALL	V Mueller	SU3490-001		BOTTOM TRAY	
1-Jan	1	0	0	RICHARDSON-EASTMAN RETR LARG DBL-ENDED 10-1/4"	V Mueller	SU3490-002		BOTTOM TRAY	
2-Feb	2	0	0	RETRACTOR, GOULET, DOUBLE ENDED	V Mueller	SU3675		BOTTOM TRAY	remove both/ make peel pack available
1-Jan	1	0	0	RETRACTOR, WEITLANER, BLUNT, 6 1/2"	V Mueller	SU3112-001		BOTTOM TRAY	
2-Feb	2	0	0	RETRACTOR, SISTRUNK, 3/8" WIDE, 6"	V Mueller	SU3710		BOTTOM TRAY	remove both
1-Jan	1	0	0	CANNULA, 6-HOLE, 14DIA X 17CM, DELUXE LUER LOCK (14G17)	Wells Johnson	20-1216-00		BOTTOM TRAY	
2-Feb	2	0	0	HOOK, SKIN, DOUBLE, 6", 2MM	V Mueller	RH1120		BOTTOM TRAY	
2-Feb	2	0	0	HOOK, SKIN, DOUBLE, SHARP WIDE, 10MM, 6 3/8"	V Mueller	RH1135		BOTTOM TRAY	
2-Feb	2	0	0	SINGLE SKIN HOOKS	Walzer Lorenz	12-0041		BOTTOM TRAY	
2-Feb	2	0	0	KNIFE, HANDLE, #3, 5"	V Mueller	SA1403-001		BOTTOM TRAY	
1-Jan	1	0	0	FORCEPS, TISSUE, 6"	V Mueller	SU2333		BOTTOM TRAY	
1-Jan	1	0	0	FORCEPS, RUSSIAN, 6"	V Mueller	SU2450		BOTTOM TRAY	remove both/ make peel pack available
2-Feb	2	0	0	FORCEPS, RUSSIAN, 10"	V Mueller	SU2454		BOTTOM TRAY	remove both/ make peel pack available
2-Feb	2	0	0	FORCEPS, DEBAKEY, 6", 1.5MM TIPS	V Mueller	CH5893		BOTTOM TRAY	
2-Feb	2	0	0	FORCEPS, DEBAKEY, HEAVY, 9 1/2", 2MM TIPS	V Mueller	CH5904-1		BOTTOM TRAY	
2-Feb	2	0	0	FORCEPS, DEBAKEY, HEAVY, 7 3/4", 2MM TIPS	V Mueller	CH5902-1		BOTTOM TRAY	
2-Feb	2	0	0	FORCEPS, TISSUE, ADSON, W/TEETH, 4 3/4"	V Mueller	NL1400		BOTTOM TRAY	
1-Jan	1	0	0	FORCEPS, TISSUE, ADSON BROWN, 4 3/4"	V Mueller	SA2504		BOTTOM TRAY	
1-Jan	1	0	0	FORCEPS, BONNEY, 1 X 2 TEETH, 7"	V Mueller	SA2542		BOTTOM TRAY	remove/ make peel pack available
2-Feb	2	0	0	FORCEPS, TISSUE, MARTIN, 6"	V Mueller	SU2490		BOTTOM TRAY	
2-Feb	2	0	0	RETRACTORS, FREEMAN, 7"	Snowden	89-1066		BOTTOM TRAY	
2-Feb	2	0	0	RETRACTOR, RAKE, 4 PRONG, SHARP, 8 3/4"	V Mueller	SA3562-01		BOTTOM TRAY	remove both
2-Feb	2	0	0	RETRACTOR, RAKE, 6 PRONG, SHARP, 8 3/4"	V Mueller	SA3564-01		BOTTOM TRAY	remove both
2-Feb	2	0	0	RETRACTOR, BENN, SHARP, 8 1/4"	V Mueller	SU3785		BOTTOM TRAY	remove both/ make peel pack available
1-Jan	1	0	0	SUCTION TIP, ANDREWS PYNCHON, 8 5/8", CURVED	V Mueller	8E470		BOTTOM TRAY	
1-Jan	1	0	0	INTEGRATOR, STEAM				BOTTOM TRAY	
51/51				Subtotal for BOTTOM TRAY					
117/119				Total					

Surgical Kit

Many hospitals utilize standardized surgical packs to set up cases in the operating room. These packs typically include single-use, disposable items such as back table drapes, suture boxes, basins, decanters, gowns, and suction tubing. These packs are typically prepared by supply chain vendors. Often these packs can be customized; however, this may require coordination of multiple surgeons and/or surgical service lines.

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For this campaign, "surgical kit" refers to standardized packs or kits used to prepare the operating room for a case. This may include single-use disposable supplies that are opened before the case begins, as well as items selected based on surgeon, procedure, or service-line needs.

Examples may include:

- Standard surgical packs
- Procedure-specific kits

- Surgeon-specific kits
- Disposable supply packs
- Custom packs prepared by supply chain vendors
- Service-line-specific kits