



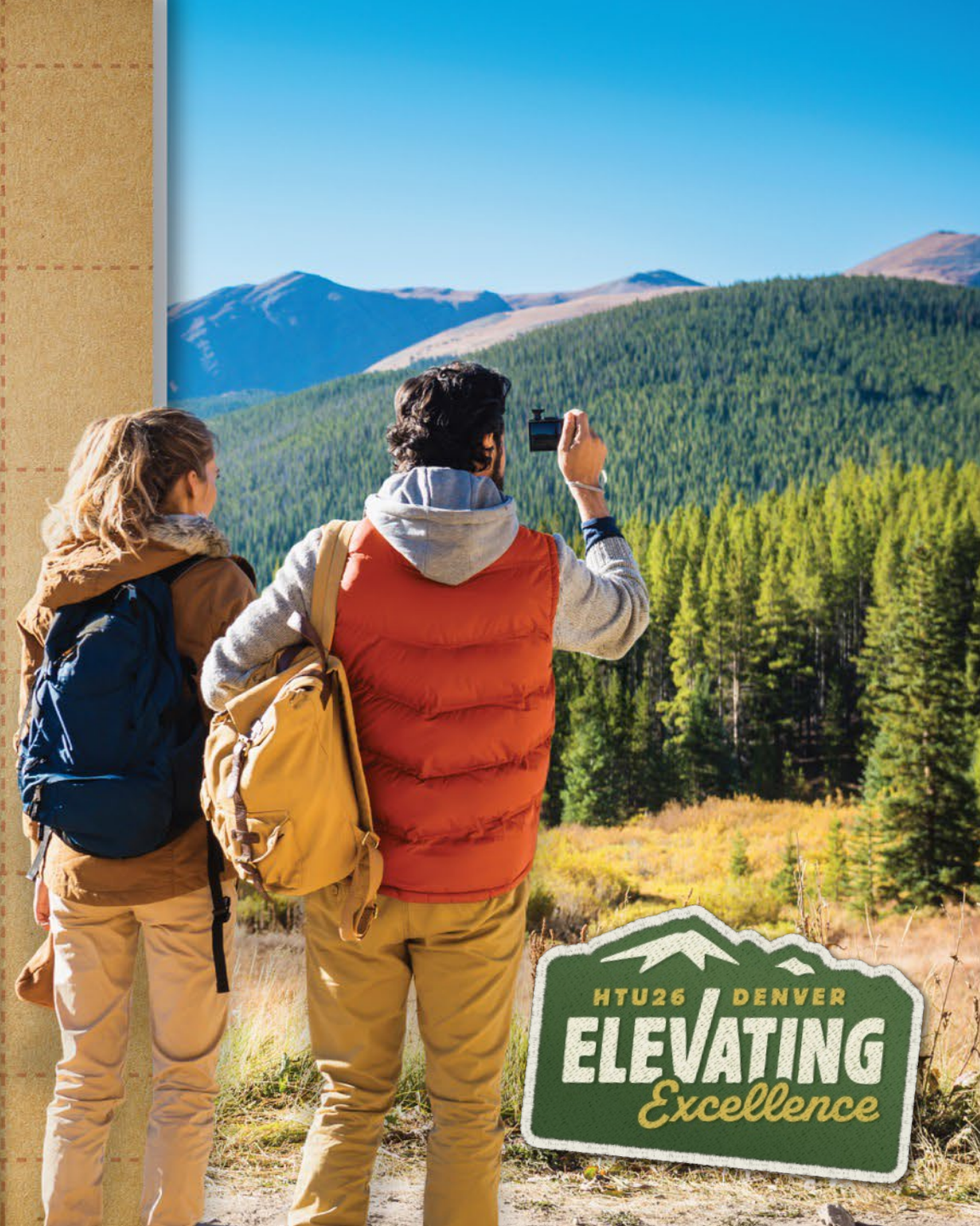
**HEALTHTRUST<sup>®</sup>**  
UNIVERSITY CONFERENCE

# Reducing Waste & Improving Accuracy: A Success Story in Preference Card Optimization

**THIS SESSION IS NOT OPEN TO SUPPLIERS**

Applying for CE credit or need a Certificate of Participation? Be sure to snap a pic of the code shown at the end of this session.

**CE Deadline: 08/31/26**

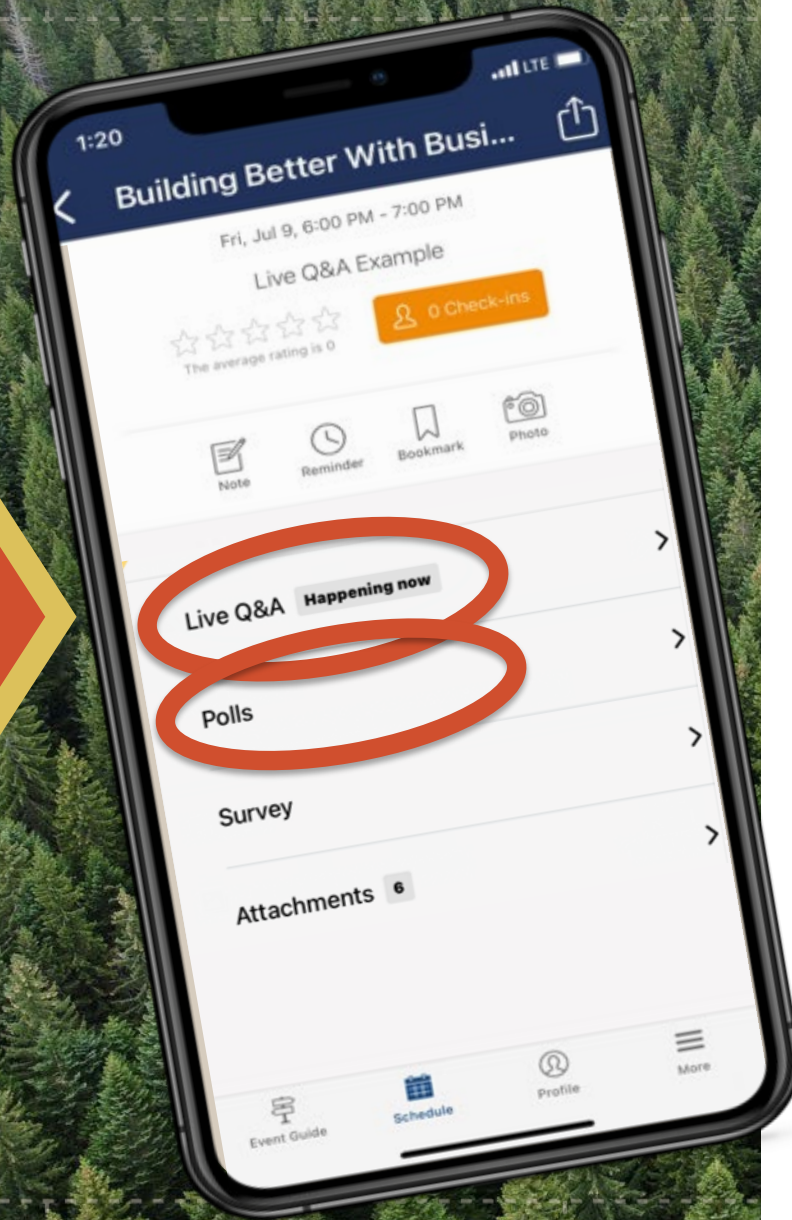


# Audience Participation

Use the conference mobile app to participate in polling or Q&A.

To ask a question:

- Select session name
- Click on “Live Q&A,” then “Ask a Question”
- Type your question & hit “Submit”
- Send in any time; Qs will be held until the session’s Q&A period at the end



# Presenters & Moderator

---



**Daniel Johnson,  
RN, BSN, MSN**

Director of  
Perioperative Services  
Lahey Clinic



**Courtney Kleeb,  
RN, BSN, MHA**

Sr. Director of Perioperative &  
Surgical Solutions  
HealthTrust



**Emily Pitera-King,  
MPH**

Administrative Director of  
Perioperative Services  
Lahey Clinic



**Moderator  
Drew Preslar, MBA**

Assistant Vice President  
Performance Solutions  
HealthTrust

# Disclosures

---

- The presenters have no real or perceived conflicts of interest related to this presentation
- Note: The content presented is for informational purposes only and is based upon the presenter(s) knowledge and opinion. It should not be relied upon without independent consultation with and verification by appropriate professional advisors. Individuals and organizations shall have sole responsibility for any actions taken in connection with the content herein. HealthTrust, the program presenter(s) and their employers expressly disclaim any and all warranties as to the content as well as any liability resulting from actions or omissions of any individual or organization in reliance upon the content.
  - This program may contain the mention of suppliers, brands, products, services or drugs presented in a case study or comparative format using evidence-based research. Such examples are intended for educational and informational purposes and should not be perceived as an endorsement of any particular supplier, brand, product, service or drug.

# Learning Objectives



*At the end of this session, participants should be able to:*



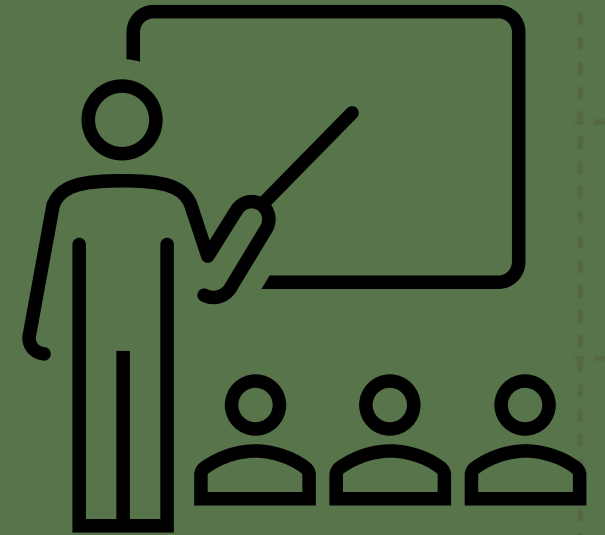
Recognize the relationship between accurate physician preference cards & improvements in surgical efficiency, cost, management & patient care quality.



Identify the key steps & practices utilized to assess, optimize & standardize preference cards.



Recall strategies to develop or enhance preference card optimization within the healthcare organization.



# What is Surgical Waste?

- Byproducts & materials from surgical procedures
  - Used
  - Opened & unutilized
- In the U.S., operating rooms generate about 70% of a hospital's total waste.
  - Equal to over **2,000** metric tons daily, or more than five 747 planes.
- One of the most effective ways to counteract waste & reduce costs is preference card optimization.

## Sources:

1. Getty Images. Used with permission of HealthTrust
2. "What a Waste! The Impact of Unused Surgical Supplies in Hand Surgery and How We can Improve" *National Library of Medicine*:  
<https://pmc.ncbi.nlm.nih.gov/articles/PMC10798204/>. Accessed 4/2/2026.



# What are Preference Cards?

|          |                                                                                   |              |   |   |
|----------|-----------------------------------------------------------------------------------|--------------|---|---|
| 40055865 | <b>SLEEVE COMPRESSION KNEE MED 9529 (40055865)</b><br>Manufacturer Number: 9529B  | CPD C:08:02  | 1 | 0 |
| 40295292 | <b>SKIN PREP TRAY W/PVP-1 (40295292)</b><br>Manufacturer Number: 4468             | CPD A:09:5   | 1 | 0 |
| 40336229 | <b>ARM BOARD PADS 31143467 (40336229)</b><br>Manufacturer Number: 31143467        | CPD A:10:2   | 2 | 0 |
| 40027313 | <b>NEEDLE SPINAL 18GA 3 1/2" (40027313)</b><br>Manufacturer Number: 333350        | CPD:         | 1 | 0 |
| 40055812 | <b>3/4 DRAPE 60X76 (40055812)</b><br>Manufacturer Number: 9349                    | CPD: A:01:03 | 2 | 0 |
| 40051962 | <b>DRAPE THYROID 29422 (40051962)</b><br>Manufacturer Number: 29422               | CPD: A:02:05 | 1 | 0 |
| 40066248 | <b>TABLE COVER 8377 (40066248)</b><br>Manufacturer Number: 8377                   | CPD: A:03:02 | 1 | 0 |
| 40167845 | <b>PATTIE SURGICAL 1/2 X 1 1/2 (40167845)</b><br>Manufacturer Number: NEUROSPNG07 | CPD: A:06:02 | 1 | 0 |

Source: LHC Supply Chain. Not for reuse without the permission of LHMC.

## The Blueprint

Surgical preference cards are surgeon or case specific “blueprints” detailing specific needs for a particular case. They act as a comprehensive guide to prepare, document & safely take care of patients during surgical operations.

Include information such as:

- Equipment
- Supplies
- Instrumentation
- Medication
- Patient positioning & room set up
- Anesthesia delivery



# Why are Preference Cards significant?



## Patient Safety

- ✓ Right supplies at right time
- ✓ Reduces delays & cancellations
- ✓ Decreases clinical variability
- ✓ Clinician familiarity & satisfaction



## Supply Chain

- ✓ Accurate & efficient case pick
- ✓ Drive correct supply utilization & forecasting
- ✓ Prevent waste & unnecessary spend
- ✓ Standardization of supplies



## Operations & Finance

- ✓ Charge capture
- ✓ Contract compliance
- ✓ Operational efficiency
- ✓ Budgetary alignment
- ✓ Data-driven decisions

### Sources:

1. "Why Do I need Preference Cards?" <https://www.aorn.org/article/why-do-i-need-preference-cards>. Accessed 4/2/2026.
2. "Manage physician preference cards to boost efficiency and patient safety." <https://www.ormanager.com/manage-physician-preference-cards-boost-efficiency-patient-safety>. Accessed 4/3/2026.

# Starting the Journey

- Initiative Drivers
  - Reduce supply variation
  - Alignment
- Opportunity Identification
  - Feedback
  - Analysis
- Challenges
  - Technology & resources
  - Standardization
  - Supply locations

Source: LHMC Supply Chain. Not for reuse without permission of LHMC



## BILH-LHMC

- Not-for-profit health system located in Burlington, MA
- Founded in 1923
- Part of Beth Israel Lahey Health system
- 396 licensed beds



# First Steps Before Launch



# How It Happens

---

- Data Pull
    - Time frame
    - Utilized cards & documentation data
    - Volume threshold
    - Apples to apples comparison
  - Card Information
    - Naming
    - Formatting
    - Duplicates
  - Analysis
    - Algorithm
      - >80% add
      - <20% remove or PRN
- 



## Things to consider:

---

- Lead times for data pulls
- Cards that don't meet volume threshold for inclusion
- Non-utilization drivers that prevent changes

# Analysis Output

| Physician Service Line | Total Cases | MFR_NA ME | mfr_catalog_nbr | MFR_ITEM_DESC                              | EA Cost  | median used | avg used | # cases used | open_qty | hold_qty | (not surge on specific | OTF count | Remove? | Change Open to Hold | Add to Hold | Change Hold to Open | Add to Open | Recommendation | Comments       |
|------------------------|-------------|-----------|-----------------|--------------------------------------------|----------|-------------|----------|--------------|----------|----------|------------------------|-----------|---------|---------------------|-------------|---------------------|-------------|----------------|----------------|
| General Surger         | 14          | MEDTRON   | EL-21-L         | EL-21-L SURGITIE LIGATING LOOP (40382915)  | \$ 84.53 | 0           | -        | 0            | 0        | 2        | 15                     | 20        | Yes     | No                  | No          | No                  | No          | Remove         | No change      |
| General Surger         | 14          | CONMED    | CD801           | ENDOKITTNER (40005676)                     | \$ 16.85 | 0           | -        | 0            | 0        | 1        | 15                     | 20        | Yes     | No                  | No          | No                  | No          | Remove         | No change      |
| General Surger         | 14          | ASPEN ME  | 371115          | BLADE B-P SURGICAL STERILE #15 (40191852)  | \$ 0.28  | 1           | 1.07     | 14           | 1        | 0        | 15                     | 20        | No      | No                  | No          | No                  | No          | No Change      | No Change      |
| General Surger         | 14          | BARD MED  | 902916          | CATH TRAY URINE METER A800365 (40029750)   | \$ 19.69 | 1           | 1.00     | 5            | 0        | 1        | 15                     | 20        | No      | No                  | No          | No                  | No          | No Change      | No Change      |
| General Surger         | 14          | BD MEDIC  | 930815          | CHLORAPREP 26ML W/TINT 260815 (40319250)   | \$ 5.70  | 1           | 1.00     | 14           | 1        | 0        | 15                     | 20        | No      | No                  | No          | No                  | No          | No Change      | No Change      |
| General Surger         | 14          | DEROYAL   | 28-0201         | TUBING INSUFFLATION LAPAROSCOPIC (401089)  | \$ 5.36  | 1           | 1.00     | 14           | 1        | 0        | 15                     | 20        | No      | No                  | No          | No                  | No          | No Change      | No Change      |
| General Surger         | 14          | ETHICON   | 2B5LT           | TROCAR 5MMX100MM OPTIVIEW BLADELESS (40    | \$ 17.10 | 1           | 1.00     | 14           | 1        | 0        | 15                     | 20        | No      | No                  | No          | No                  | No          | No Change      | No Change      |
| General Surger         | 14          | ETHICON   | 2CB5LT          | 5x100 Sleeve (40217152)                    | \$ 11.97 | 1           | 1.07     | 14           | 1        | 0        | 15                     | 20        | No      | No                  | No          | No                  | No          | No Change      | No Change      |
| General Surger         | 14          | CARDINAL  | 2D73EB          | GLOVE SURG PROTXIS BLUE LF 7.5 (40052220)  | \$ -     | 2           | 2.00     | 14           | 2        | 0        | 15                     | 20        | No      | No                  | No          | No                  | No          | No Change      | No Change      |
| General Surger         | 14          | CARDINAL  | 2D73PN          | GLOVE PROTEXIS PI MICRO SZ 7.0 (40052241)  | \$ 1.30  | 1           | 1.00     | 14           | 1        | 1        | 15                     | 20        | No      | No                  | No          | No                  | No          | No Change      | No Change      |
| General Surger         | 14          | ETHICON   | 2H12LP          | TROCAR 12MMX100MM BLUNT HASSON (401164)    | \$ 17.10 | 1           | 1.00     | 14           | 1        | 0        | 15                     | 20        | No      | No                  | No          | No                  | No          | No Change      | No Change      |
| General Surger         | 14          | CARDINAL  | 9529B           | SLEEVE COMPRESSION KNEE MED 9529 (4005586) | \$ 8.99  | 1           | 1.00     | 13           | 1        | 0        | 15                     | 20        | No      | No                  | No          | No                  | No          | No Change      | No Change      |
| General Surger         | 14          | ETHICON   | DNX12           | DERMABOND ADVANCED ADHESIVE 0.7ML (4011    | \$ 15.75 | 1           | 1.00     | 14           | 1        | 0        | 15                     | 20        | No      | No                  | No          | No                  | No          | No Change      | No Change      |
| General Surger         | 14          | MEDTRON   | E2515H          | BOVIE PENCIL HAND SWITCH (40079833)        | \$ 2.38  | 1           | 1.00     | 12           | 1        | 0        | 15                     | 20        | No      | No                  | No          | No                  | No          | No Change      | No Change      |
| General Surger         | 14          | MEDTRON   | E3773-3         | ELECTRODE L-HOOK 36cm (40382397)           | \$ 27.98 | 1           | 1.00     | 9            | 1        | 0        | 15                     | 20        | No      | Yes                 | No          | No                  | No          | Change to Hold | Change to Hold |

Source:HealthTrust Supply Chain. Not for reuse without permission of HealthTrust.

# Data-driven Value

| Row Labels                                   | Surgeon A            |                    | Surgeon B            |                    | Surgeon C            |                    |
|----------------------------------------------|----------------------|--------------------|----------------------|--------------------|----------------------|--------------------|
|                                              | Cost of Picked Items | Cost of Used Items | Cost of Picked Items | Cost of Used Items | Cost of Picked Items | Cost of Used Items |
| ANORECTAL SURGICAL EXAM REQUIRING ANESTHESIA |                      |                    | \$165                | \$192              |                      |                    |
| COLONOSCOPY WITH EMR                         |                      |                    | \$1,703              | \$475              | \$4,282              | \$1,308            |
| INSERTION SETON                              | \$63                 | \$38               |                      |                    |                      |                    |
| LAPAROTOMY EXPLORATORY                       | \$1,646              | \$622              |                      |                    |                      |                    |
| ROBOTIC COLECTOMY RIGHT                      | \$9,233              | \$15,724           | \$19,597             | \$12,250           |                      |                    |

- Picked item cost (i.e., items on pref card) less than used items (i.e., documented) indicates:
  - Inefficiencies in staff not having needed supplies
  - Lagging time goals (operating time, turn over times, first case on time starts)
  - Increased infection control risks

- Used item cost lower than picked item cost indicates:
  - Inaccuracy of preference card
  - Wasted time pulling items & restocking supplies that go unused
  - Increased risk of supply waste (items pulled, not used, thrown away)

Source: HealthTrust Supply Chain. Not for reuse without permission of HealthTrust.

# The Results

## Impact

- **\$457,623**

Annual cost of supplies removed

- **\$38,634**

Annual cost of supplies moved from always “Open” to “Hold”

- **4,595**

Item picks eliminated per year



## Insights

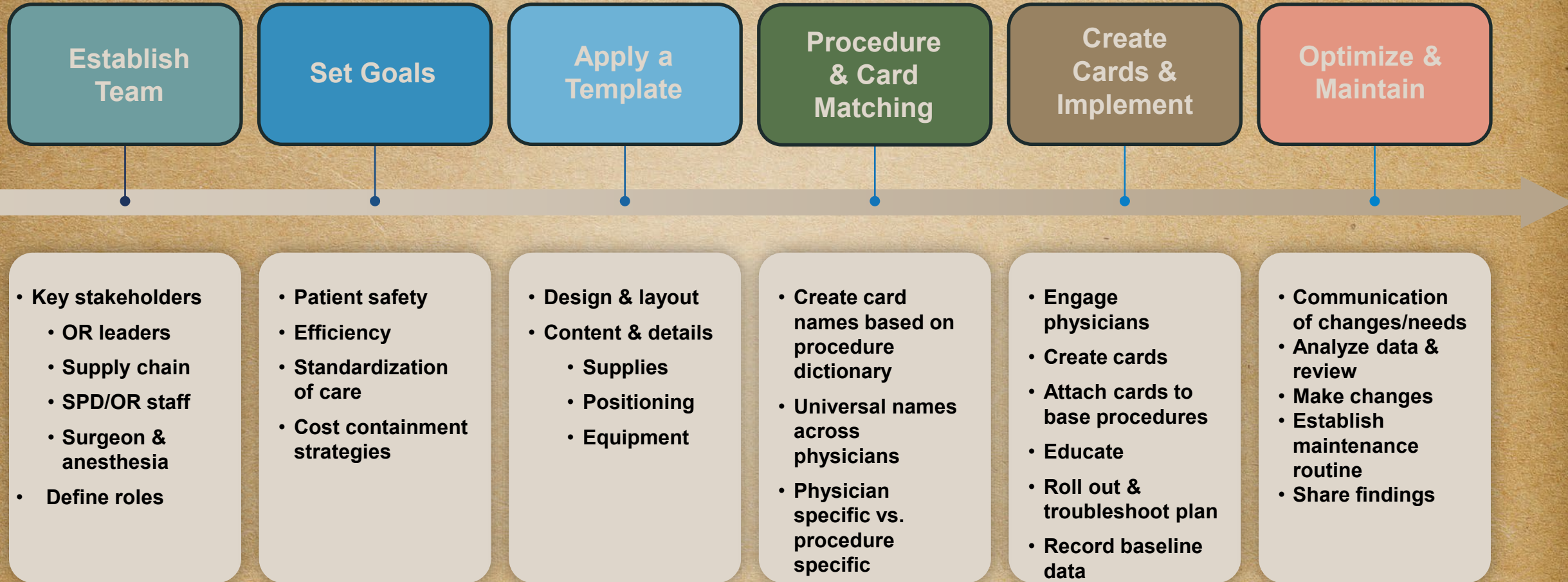
- Algorithm recommended changes on 2,169 individual line items across 201 preference cards
- Identified 1,278 unutilized cards in EHR to be reviewed for de-activation
- Removed duplicate supplies from cards that were included in procedure packs
- Provided line-item detail for cost per case
- Provided physician to physician comparison



## Value Drivers

- Standardize preference card format
- Sort inventory by location for efficient case pick
- Add item value for visual cues
- Standardize card names & merge where appropriate
- Document all drivers for changes or not changing

# How to?



Source:

1. Using Preference Cards to Lower Supply Costs. <https://www.hstpathways.com/blog/using-preference-cards-to-lower-supply-costs/>. Accessed 4/3/2026.

# In Closing



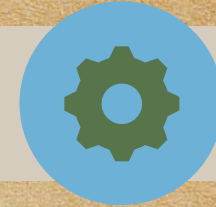
## Barriers

- Resources
  - Time
  - People
- Ownership
- Technology
- Information disconnect



## Success & Sustainability

- Playbook creation
- Assigned ownership
- Dashboards
- Dedicated time



## Tools

- HealthTrust partnership
- EHR dashboards & reporting
- Third-party applications



# Thank You!

