CPOE Order Management (Basics)

Orders Workspace Layout

The Orders Workspace layout is broken into 4 sections.

1. **Section 1**
   - Buttons and drop-downs are displayed horizontally which include actions to perform.
   - Example: Add Order, Document Medication by IX, Reconciliation, Check Interactions, External RX History, Rx Plans.

2. **Section 2**
   - The Navigation pane displays:
     - Order Types
     - Completed
     - Recertifications
     - This pane can be collapsed to increase viewing space by clicking on the left arrow icon.

3. **Section 3**
   - Additional display functionality and tools to assist with:
     - Filtering the display
     - Display in Full Screen
     - Printing the display
     - Refreshing the display
     - Customizing the display

4. **Section 4**
   - Order list displays contains orders categorized by type with sortable columns and special icons indicators.

Customizing Orders Workspace

It is necessary to ensure that the appropriate icons are visible in the **Type** column and that the Orders displayed in the Orders workspace are grouped by Venue, then by Clinical Category.

In order to apply these settings for each required tab, Orders AND Medication List, it is critical to set the view to the following parameters as shown below:

1. Right-click and select **Customize View**.

2. Move the **Type** column from the **Available** columns pane on the left to the right, by selecting it, and then clicking the **Add** button.

3. This **Type** column displays icons which assist in easily distinguishing between types of Med orders.

4. Select **Venue** from the Group Orders by drop-down.

5. Select **Clinical Category** from the Then by drop-down.

6. Click **OK** when done.

Display Filters

Orders can be in different statuses and can be displayed according to their status as defined by the **Display Filter** criteria.

- **Active**
- **Future**
- **Incomplete**
- **Suspended**
- **On Hold/Not Med Student**

**Recommend:** All Active Orders.

Add Order Window

The **Add Order** window is used to locate and select new orders for the patient. Below gives a quick overview of the window:

- **Select Patient**
- **Select Order Type**
- **Select Order Details**
- **Select Order Locations**
- **Add to Chart**

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Add Order Window (cont’d)

1. The **Find** field allows you to search for an order if it is not displayed.
2. Use the **Binoculars** button to find all.
3. The **Find filter** allows you to further define the criteria of the text search (Starts with or Contains).
4. The **Type filter** allows you to further define the search criteria by defining the type of order.
5. This area contains folders in order to aid in ease of navigation and utilizing favorites.
6. Orders can be grouped and listed inside Departmental Folders. Folders can be created by going to **Organize Favorites**.
7. This area is available to be used to add a new Dx being addressed at this visit.
   - Admission Orderset should have diagnosis associated.
8. This area is available to be used to add a new Problem being addressed at this visit or to convert to Diagnosis.
9. After clicking to select an order (be careful not to double-click), click **Done** to close the Add Order window, and begin to work in the Order Details pane.
   - If order was placed twice due to double-clicking, duplicate orders alert will display in orders workspace and can be removed. Highlight Order, Right-click and select **Remove**.

Order Alerts/Warnings

During the ordering process you will be automatically alerted whenever a compromising condition has occurred. You can also proactively check alerts by selecting the **Check Alerts** button, once you have selected a PowerPlan.

Occasionally a **Duplicate Order Alert** is displayed after signing the order. This alert indicates that you are attempting to order something that has already been ordered.

Add Order Window (cont’d)

Order Alerts/Warnings (cont’d)

1. Make the appropriate action selection at the bottom of the window. The options are:
   - **Order Anyway** – Allows the duplicate order to be placed.
   - **Remove** – Cancels the new order.
   - **Modify** – Lets the provider change the new order.
2. Repeat step 1 as many times as necessary until there are no more duplicate orders.
3. Click the **OK** or **Sign button** after the window closes. Be sure to also click **Refresh** to refresh the screen.

**Decision Support Alert** appears when drug to drug interactions or allergy to medications exist.

1. Enter an **override** reason for each interaction.
2. Click **Continue**.
   - You are returned to the **Orders** window.
3. Click **Orders for Signature**.
4. After completing all required fields, click **Sign**.
5. Click **Refresh** to refresh the existing orders.

**Adding Orders**

When a single order is placed, immediately you will be taken to the scratchpad which contains a top and bottom pane. Multiple orders can be selected from the Add Order window and each will display in the top pane (2).

The bottom pane contains the following three tabs (4):

1. **Details**: The details pane (1) displays details that need to be entered concerning the order. Required order details are always yellow.
2. **Order Comments**: Use the special instruction field. Order comments are entered on this tab and will carry over to the order profile.
3. **Sign**: Click the **Sign** (3) button.
CPOE Order Management (Basics)

Adding Ordersets

An Order Set is a group of orders under a single title designed to support a procedure or a process.

1. Select an Order Set from the Add Order window.
2. A list of orders have been predefined for each order set. Some Orders are pre-selected and can be de-selected, unless box is dithered/gray.
3. Orders can be individually selected as part of the order set, as needed.
4. Complete each Order Detail including required details, as applicable. Click gray drop down arrow for predefined Order details.
5. Once all selections have been made, click the Orders for Signature button.
6. Once complete, click the Sign button.
7. Click Refresh. The order set is initiated.

Note: You can not add an Orderset within an Orderset.

Orderset Sub-Phases

Some Ordersets include Sub-phases.

1. To include the sub-phase, click the check box to select it in the Orders for Signature window.
2. As soon as the sub-phase is selected, select all orders to be included in the sub-phase and complete the order details.
   - The sub-phase is in an Initiated Pending status.
3. Return to the standard Orders for Signature view by clicking the Return to ... button.

Save Orderset Elements as Favorites

After selecting all components of the Order Set and the details have been entered/edited, you can save the elements of the Order Set as a Favorite.

1. Before signing Orderset, click the Save as My Favorite button.
2. Input a unique name for your Order Set and click OK.
   - The Order Set will be saved in the My Favorite Plans folder within the add order window.
   Use Order Information to view detailed, in-depth information about an order or order set components.

Order Information

1. Right-click the order you wish to see additional information on.
2. Select Order Info from the shortcut menu.

Icons

Orders for Signature—Displays a list of the current orders in the Order Profile window that require a signature. Orders may NOT be your order to sign. Proceed to Message Center to sign your Telephone/Verbal order.

Sign - Signs all orders currently displayed in the Order Profile window and sends them from Order status to Processing status.

Missing Required Details - Click this button and the system takes the user to the next missing detail in the order entry format. As each missing and required detail is addressed, the system updates the number displayed on the button. The button serves as both a count of the missing details and a mechanism to locate them.

Add - Click to add an order, an Allergy or home medication history.

Expand and Collapse (Clinical Category) - A plus sign indicates that the item (clinical category) can be expanded. The minus sign means that the item is expanded and can be collapsed. Click either symbol to toggle between views.

Expand and Collapse (Details Pane, Orders Navigator) - Click the up arrows to expand or collapse the detail screen.

Order Details Not Complete - Indicates that there are required order details that have not been completed for the orderable.
## Icons

### Active and Inactive Orders
- A check mark indicates that the order is currently active. To inactivate an order, click the check mark to remove it. This action may cause a dialog box to be displayed requiring a reason for discontinuing the order. Orders that are in a final status, such as Completed or Discontinued, do not display check marks because they are no longer active.

### Orderset
- Indicates a care set orderable in the orders search window.

### Clinical Calculator
- Launches the clinical calculator.

### Dose Calculator
- Launches the dose calculator.

### Medical Student Cosign
- This icon indicates that medical student Co-signature is required for the order.

### Nurse Review
- This icon indicates that nurse review is required.

### Phase (Initiated)
- Indicates a phase in a plan. The yellow Phase icon indicates that it has been initiated.

### Phase (Completed)
- Indicates a phase in a plan. The gray Phase icon indicates that it has been completed.

### Physician Cosign
- This icon indicates that physician cosign is required for the order.

### Physician Cosign Refusal
- This icon indicates that the physician has refused to cosign the order.

### Reference Text
- This icon indicates that reference text is associated to the order.

### Renew Indicator - Hard Stop Policy
- A red hourglass with a lock signifies a hard stop, meaning the order will be stopped when its expiration time is reached. A user must intervene to continue this order.

### Renew Indicator - Soft Stop Policy
- A yellow hourglass is displayed for an orderable defined with a soft stop associated with it, meaning that it is recommended that the order be discontinued when the stop time is reached, but the system will not automatically stop the order.

### Rx Verify Indicator
- The Rx prescription icon means that the order is subject to pharmacy review and has not yet been reviewed by a pharmacist.

### Rx Refusal Indicator
- Indicates that a pharmacist has rejected the order.

### Taper Dosing
- Opens the Taper Dose Tool

### Advanced Medication Management
- Open to review medication schedule. Use Post Procedure.

### Sliding Scale
- Opens the Sliding Scale dialog box.

### Check Interactions
- Button shown top, indicator shown bottom.

### Check Interactions previously completed.

### Merge View
- Allows proactive duplicate checking when using two different Ordersets.

### Initiate
- Activates plan orders, outcomes, and interventions

### Discontinue
- Discontinuation of Plan.

### Add to Phase
- Allows order, Outcome and Interventions to be added quickly to Orderset.
View Excluded Components - Use after Orderset signed and would like to place an order within Orderset with all order details complete.

Clicking the Check Interactions button will display the Interactions as of (Time) button.

Clicking the Interactions as of (Time) button will cause the blue icon to display next to medications that have interactions.

Below is an example of how a Medication Order Profile will display with NF/OF-ePrescribe notations and Interactions.

Clicking the Blue Icon will display the Interaction Window.

Clicking the Rx Plans button activates the External RX Information.

The External Rx History button will access SureScripts and pull in any prescriptions that have been filled at a participating pharmacy.

External Rx History must be clicked in the ED for Pharmacy History to return and be viewable in the inpatient floors. Once a patient becomes an Inpatient, you cannot pull in the Outpatient Pharmacy History.

Rx Plan—Click to check coverage of Prescription based on Patient's Insurance.