Order Management Activities

In Class Exercises - Order Management

Exercise 1: Medical Imaging Orders

Make sure you have opened your assigned patient's chart. Click on the orders tab in the "Do" portion of the EMR (on the list on the right-hand side). If there are no allergies, height and/or weight entered on your patient a pop up will happen. You should select Clinical Data in the footer to enter this information. For training click **OK**

- Select **New Orders**.
- Provider: A screen will pop up that requires you to identify the ordering provider (if there is an MRP this will default. If the ordering provider is not the MRP or there is no doctor defaulted, you will need add one. Click on the carrot in the other provider line. In the search bar type zz and click the enter button on the keyboard, select **ZZTempate,ERDoctor**
- Source: Click on **Telephone Read Back**
- Click **OK**
- Click **Name** make sure **Any Word** is highlighted, if not select **Any Word**
- The order is: CXR AP & LAT c/o Chest pain and ECG 12 lead - Urgent
- In the order line type **CXR,** from the list select CXR2
    - Notice that your [QUEUE] has a 1 in the button
    - That's what you have in your shopping cart
- Click in the Order field (it will be highlighted in green) and type **ECG,** select ECG 12 lead
    - Notice that your (QUEUE] now has a 2 - 2 orders in your shopping cart
- Click **NEXT** for Order Details
- Note priority may need to be changed- priorities depend on the category
    - **STAT** means that it is an emergent issue, you will also need to call Medical Imaging to let them know you have a stat order
    - **Urgent** pushes your order to the top of the list. It needs to be processed ASAP, before routine, under STAT
    - **Routine** means whenever Medical Imaging can take the image or process the request to book a scheduled time
- Choose the priority - **Urgent for both**
- If necessary, complete some information depending on the type of exam
- Any required fields will be marked with a red asterisk and note the red Edit box to the right
- If the queries are on the front page, then highlight and enter the response
  Otherwise, select the red edit box to open the screen

- Any field with an (*) require a response Click in the box next to Relevant Clinical Information, type c/o chest pain and click enter.
- Click **Next**

Note the **red** asterisk (*) will turn **green** and the **red** Edit box will turn **blue** once all required questions have been completed

- Click **Submit** to process your orders
- Enter **PIN** and hit **Enter** on your keyboard

Exercise 2: Lab Orders

- Select New Orders.
- Provider: A screen will pop up that requires you to identify the ordering provider (if there is an MRP this will default. If the ordering provider is not the MRP or there is no doctor defaulted, you will need add one. Click on the carrot in the other provider line. In the search bar type **zz** and click the enter button on the keyboard, select **ZZTempate,ERDoctor**
- Source: Click on **Telephone Read Back**
- Click **OK**
- Click Name make sure Any Word is highlighted, if not select Any Word
- The order is: CBC, LYTEs, Type and Screen, Blood Culture, Stool Culture and Urinalysis
- In the order line type **CBC,** from the list select CBC
    - Notice that your [QUEUE] has a 1 in the button
    - That's what you have in your shopping cart
- Click in the Order field (it will be highlighted in green) and type **LYTES,** select LYTES
    - Notice that your (QUEUE) now has 2 orders in your shopping cart
- Click in the Order field (it will be highlighted in green) and type **Type and Screen,** select Type and Screen
- Click in the Order field (it will be highlighted in green) and type **Blood Culture,** select Blood Culture
- Click in the Order field (it will be highlighted in green) and type **Stool Culture,** select Stool Culture
- Click in the Order field (it will be highlighted in green) and type **Urinalysis,** select Urinalysis
    - Notice that your (QUEUE] now has 6 orders in your shopping cart

Now that you've gotten everything you want in your shopping cart, you can add some details to all your items

- Click **Next**
- Note the priorities are different than for Exams
    - **STAT** means that it is an emergent issue. There are specific turn around times for STAT (20 minutes for some organizations). Not all lab items will have STAT, such as microbiology. So you will notice differences in the options available.
    - **Urgent** pushes your order to the top of the list. It needs to be processed ASAP, before routine, under STAT
    - **Routine** means the next collection time
    - **Timed** pertains to certain tests that need to be collected at certain times such as Cardiac markers and drug levels
- Select **STAT** for Blood Culture and Routine for all others (**Hint**: to change status de-select the existing priority and select the new)
- Note that three (3) tests require additional information - Blood Culture, Stool Culture and Type and Screen as both have **red** asterisks (*) beside the query and both have a **red** Edit button

- These queries can be answered from the front page by clicking on the query in the field under status and a drop-down list is available by selecting the carrot
- Type and Screen: Find the Previous Transfusion line and click the carrot on the right, a drop-down box will appear and select **NO**
- Blood Culture: Find the *MIC Source line and click the carrot on the right, a drop-down box will appear and select **Peripheral Draw**
- Stool Culture: Find the *Mic Source line and click the carrot on the right, a drop-down box will appear and select Colostomy, Find the *Specimen line and click on the carrot on the right, a drop-down box will appear and select Pre-Collection Label
- Click **Submit** and enter **Pin** then hit **Enter** on your keyboard

Exercise 3: Diet Orders

- Select New Orders.
- Provider: A screen will pop up that requires you to identify the ordering provider (if there is an MRP this will default. If the ordering provider is not the MRP or there is no doctor defaulted, you will need add one. Click on the carrot in the other provider line. In the search bar type **zz** and click the enter button on the keyboard, select **ZZTempate,ERDoctor**
- Source: Click on **Telephone Read Back**
- Click **OK**
- Select Name and type: **Protocol for** you will see a choice for **Protocol for Diet Ordering**. This is new for some sites. Nursing will then have to go in and place the proper order based on the protocol.
- Click **Next**
- Click **Submit** and enter **PIN** and hit **Enter** on your keyboard
- Go to worklist and click on **Protocol** (**Hint**: it is the "P" icon under the **'?'** column)
- In this case we are going to pretend our patient has Congestive Heart Failure
- Go back into **Orders** in the "DO" section of EMR
- Select **New Orders** in header
- Provider: A screen will pop up that requires you to identify the ordering provider (if there is an MRP this will default. If the ordering provider is not the MRP or there is no doctor defaulted, you will need add one. Click on the carrot in the other provider line. In the search bar type **zz** and click the enter button on the keyboard, select **ZZTempate,ERDoctor**
- Source: Click on **As Per Protocol**
- Click **OK**
- Search "**Diet**" - make sure to search for "diet" by **ANY WORD**
- Select **Heart Healthy Diet**
- Select **Next** in footer button
- Click the **Red Edit** this time to see all of the modifiers and restrictions that can be added
- Find ***Solid Texture** and click the carrot, select **Pureed**. It is understood if you do not make a change the **Fluid Modifier** or **Solid Texture** that the diet will be **Regular texture** and **thin liquids**

- If your patient has complex needs, such as small frequent meals and fluid restrictions, this will need to be edited within the **Speciality Diet Requests** click on the carrot and review the options.
- Click **Submit** and enter **Pin** then hit **Enter** on your keyboard

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Exercise 4: Diet Special Needs/Dietary Supplement

- Select New Orders.
- Provider: A screen will pop up that requires you to identify the ordering provider (if there is an MRP this will default. If the ordering provider is not the MRP or there is no doctor defaulted, you will need add one. Click on the carrot in the other provider line. In the search bar type **zz** and click the enter button on the keyboard, select **ZZTempate,ERDoctor**
- Source: Click on **Telephone Read Back**
- Click **OK**

- Click **Category**
- Under the **Others** column
- Select the "**+**" next to **Dietary Special Needs** and **Dietary Supplements** to see what resides under those tabs
- Click **Back**

Exercise 5: Consult and Referral Orders

- Select New Orders.
- Provider: A screen will pop up that requires you to identify the ordering provider (if there is an MRP this will default. If the ordering provider is not the MRP or there is no doctor defaulted, you will need add one. Click on the carrot in the other provider line. In the search bar type **zz** and click the enter button on the keyboard, select **ZZTempate,ERDoctor**
- Source: Click on **Telephone Read Back**
- Click **OK**

- Click Name and enter **Consult General Surgery**
- Click Name and enter **Referral Social Worker** and hit **Next**
- Select the top **Red Edit** button
- Find *Reason for Exam, click in the cell and type **Abdominal Pain X 3 weeks**
- Find *Consulting Provider click the drop-down carrot and select **Other Provider** Search for **ZZTemplate, INDoctors**
- Find ***Has provider been notified** click the drop-down carrot and select **Yes** (remember if you are entering this order for a provider, you must ask if the provider has been notified)
- Select **Next** in footer
- Select the ***Red Edit** button in the Referral Social Work section
- Select the drop-down carrot in in ***Social Work Referral Reason,** select **Safety** from the drop-down menu
- Click **Next** then click **Submit** in footer and enter **Pin** then hit **Enter** on your keyboard

Exercise 6: Patient Care Orders

- Select New Orders.
- Provider: A screen will pop up that requires you to identify the ordering provider (if there is an MRP this will default. If the ordering provider is not the MRP or there is no doctor defaulted, you will need add one. Click on the carrot in the other provider line. In the search bar type **zz** and click the enter button on the keyboard, select **ZZTempate,ERDoctor**
- Source: Click on **Telephone Read Back**
- Click **OK**
- Click Name and type **Restraints** and select **Renewable Q24H** and click **Next**
  - Select **Daily**
  - Select the **Red Edit** button
  - Select the drop-down carrot in **Type of Restraint Ordered by Physician** and select **Safety**
  - Select the drop-down carrot in **Behavior Requiring Restraints** and select **Threatening** and **Biting**
  - Select the drop-down carrot in **Type of Restraints** and select **4 Bed Rails** and click **Next**
  - Note: a pop-up box will appear "The following Reflex sets were loaded: Restraint Assessment" Click **OK** will result in the restraint assessment being automatically added onto the worklist
  - Click **Next** Click **Submit** enter **PIN** and click **ENTER**
- Select New Orders.
- Provider: A screen will pop up that requires you to identify the ordering provider (if there is an MRP this will default. If the ordering provider is not the MRP or there is no doctor defaulted, you will need add one. Click on the carrot in the other provider line. In the search bar type **zz** and click the enter button on the keyboard, select **ZZTempate,ERDoctor**
- Source: Click on **Telephone Read Back**
- Click **OK**
- Click Name and type **POC Capillary Blood Glucose** and select **POC Capillary Blood Glucose** and click **Next**
  - Select **Q2HR** and click **Next**
- Click **New orders**
- Click **Name** and type **No IM Injections click in the box** and click **Next**
- Click in the **Order** cell and type **Nurse to Enter: Blood Cultures if** and click in the box, click next
- Select **PRN** and click **blue Edit** button
- Find the line **Blood cultures if temperature above** and click on the carrot enter the temperature the physician requested **(38.5)** and click **ok**
- Click **Submit** in footer and enter **Pin** then hit **Enter** on your keyboard
- Click on the Status Board/Tracker and communication orders for **No IM Injection** appears in the blue secondary status board in the communication line
- Open the chart and go to the **worklist** and note the orders that require nursing to do something with that have flowed to the worklist

Exercise 7: Medication Orders

- Open your assigned patient's chart and click **Orders**
- Click the **New Med** button
- Enter attending/MRP provider and select telephone as the source
- **Favourites** default, change to **Name** to search by med name
- Enter **Tyl** for Tylenol
    - The screen changes to show several medications that start with Tyl
- Click the Tylenol at the top of list
- Select Next in the footer buttons
    - Numerous strings will appear
    - Pick the one that most closely matches the order
    - **Acetaminophen 500 mg - 1000 mg Q6h PO tab**
- Checkmark this medication
- The screen expands to include the complete order
- The type defaults to PRN (you could change by clicking on the PRN field)
- Select the blue **Edit** button to expand the order detail
- At this point any of the fields in white could be updated.
- Find the *****Freq click the carrot** to open the drop-down list and if **Q8HR** is not available click at the bottom of the list in the cell and type **Q8HR** and click enter
- Click **Submit** in footer and enter **Pin** then hit **Enter** on your keyboard

Exercise 8: Medical Directives Order Sets - Searching

Order sets includes order sets providers would order and Medical Directives that nursing can order

- Click the **New Sets** button
- Enter attending/MRP provider and select telephone as the source
- **Favourites** default, change to **Name** to search by med name and select **Any Word**
- Enter **MEDIR** and you will get a list of just Medical Directives
    - ★ For those areas that use Medical Directives, these can be added to your Order Set Favourites so you don't have to search for them - ED, ICU, NICU, Peds, Maternal
- **DO NOT PLACE AN ORDER AT THIS TIME**

Exercise 9: Training Medication Order Sets

- Click the **New Sets** button
- **Favourites** defaults, change to **name** to search for the order set by name
- Enter **Test PCS PHA demo (training) For Paediatrics: PCS test set PAEDS/NEO**
- **Checkmark** the correct set
- Click **Next**
- The screen changes to display all of the medications in the set
- Note that there are *NO* **Red** Edit buttons, which means all of the required fields have been pre-populated in the set
- Click **Submit**

First Dose Warnings

- Since you are ordering scheduled daily medications, you are prompted with a message to define to start the first dose now or start next scheduled time

Let's select to start NOW:

- o Select **OK**
- o Select First scheduled admin time - Click on **Now**
- o Click OK
- o **Repeat** the same steps for the rest of the meds

Manage Order List Conflicts screen will appear:
- o Select **Override** for each individual conflict

- Click **Submit** in footer and enter **Pin** then hit **Enter** on your keyboard
- A Resolve Conflicts screen will appear select **Override**, select **order list** in the footer on the left and select the middle option with 125 ml/hour, click **Next**, and click **Override**.

Exercise 10: Duplicate Orders

- ● Select the **New Orders** tab and select the **Name** and then **Any Word** buttons
  - o Fill out required fields
- ● Enter CBC order and select **Next** in the footer
- ● When you get to the **Manage Order List**
  ### *Stop here!*
- ● You will notice that there are **TWO** orders under CBC the original order displays in black writing and the new order displays in green writing
- ● There is a **blue** edit button with the priority of **ROUTINE** already (your previous order/ still active)
- ● You will see the orders appear like this if there is already an order active that you are duplicating
- ● Sometimes there are stops and other times, you are allowed to bypass
- ● Click **Submit**
  - o In this case Lab has set a duplicate time frame of 6 hrs. and so when you submit you are brought into a **Manage Order List Conflicts** screen identifying duplicates
- ● If you still want to order the test
  - o Select **Override** from the top right action cell.
  - o Select reason **MD Okayed**
- ● Click **Submit** and enter **Pin** then hit **Enter** on your keyboard

Exercise 11: Cancel/Stop Orders

- ● Select the **Orders** tab in the "**Do**" section of the EMR
- ● Find the **ECG** order.
  - o To make searching easier click on the word **Current** Orders in the blue bar on the table and it will sort the list alphabetically
- ∉ Click on the word **Ordered** in the **status cell** on far-right side of the ECG order, select **stop**
- ∉ A new page may open
  - o It may prompt you to enter in the Provider and Source details and hit **OK**
- ∉ After selecting **Stop** you will need to enter a **Stop Reason**, select from the drop-down list

○ Select **Entered in Error**
∉ Save by clicking **OK**
∉ Click **Submit** in footer and enter **Pin** then hit **Enter** on your keyboard

Note that the order status is now **Stop Requested**, and a stop date/time appears, both in **red** font

The stop request will notify the Lab that the order is cancelled

Exercise 12: Acknowledge Orders

- Return to the **Status Board/Tracker**
- Highlight your patient
  - Note that you should have **Ack** or **Ack-Med** or **Stat** displayed in the **ACK** column of status board
- Click in the **ACK** cell and you are taken to the **Manage/Acknowledge Orders** screen
- Click **Acknowledge** in the right menu
- Place a checkmark beside each order and review the details *or* you can select multiple orders to acknowledge by clicking the checkmark in the blue bar on the top next to Selected orders.
- When complete click the **Acknowledge** button in the footer
- A warning pop up screen may occur click **Yes**
- Notice the status changes to **Acknowledged** and select **Save**
- Then click **Return to Status Board/Exit to Tracker**
- Note the **ACK** cell is now empty for your patient

Exercise 13: Collect Specimen from the Worklist

- Go to the Status Board and under the **UNC** column for your patient.
  - Click on **UNC cell**
- Your worklist will open and look for the intervention -
  - **Collect Specimen: Urinalysis**
  - Note that it will be an "**O**" intervention meaning it is an *ordered intervention*
  - Click in the **Now** column a check mark will appear
- Select Document from the footer buttons
  - A screen will appear with order details
    - If you collected the sample ½ hr. ago then you should change the time by clicking on the top carrot in the green box and backdate the entry.
  - Select **Save and Exit** in the bottom right corner
- You will be directed back to the worklist. Under the **Now** column you will see the word **done**
- Click **Refresh** in the footer. This completes the intervention and removes it from your worklist, completes the order in OM and queues the lab label to print

Exercise 14: Series Orders Daily / Timed Orders

Orders can be entered for labs/tests that need to be ordered daily x # days

- For example, CBC x 3 days, CXR x 3 days

- Select the **New Orders** tab and select the **Name** and then **Any Word** buttons
  - Fill out required fields
- Enter **CBC**, click in the box and then click **Next** in footer
- Click the Blue Edit button next to the current order shown in **GREEN** writing
- Start Date – Enter the day you want the bloodwork to start (tomorrow)
- Start time – **is to Default** on Lab AM Draw time (Site/Loc specific) - do not change
- Freq – Daily (Note the frequency can be changed to match the order (Q6H)
- Stop Date and Stop Time
- Count - Enter 3 to do CBC x 3 days
- Note that the stop date is now three days from the start
- Note the order at the top of the page now has a number in brackets at the end
  - This indicates the number of draws that will occur for this test
  - In this case three
- ∉ Click **Submit** in footer and enter **Pin** then hit **Enter** on your keyboard

Timed Orders / Timed Series Orders

Orders can also be entered for labs/tests that need to be done in a series but based on time

- For example - Troponin q6h x 5

- Select the **New Orders** tab and select the **Name** and then **Any Word** buttons
  - Fill out required fields
- Enter **Troponin** and select **Troponin I High Sensitivity** click **Next**
- **Uncheck** the default Urgent and more frequencies will display
- Select **Routine**- since these require that the specimen be drawn at a specific time
- Click the **Blue** Edit button on right side
- Start Date - Default to today - doesn't require change unless you do not want the first specimen to be until tomorrow
- Start Time - change the time to when you want the first specimen to be drawn
- Click on the frequency cell, this should highlight the word in blue and hit **delete/backspace** on keyboard. Now you can type in **Q6h** or however often you want this sample collected.
- Next select the drop-down carrot in **Series Priority**
  - Select **Timed**
- Count - enter **5**
- Stop Date and Time changed
- Note the order at the top of the page now has a number in brackets (5) at the end
  - This indicates the number of draws that will occur for this test
  - In this case five
- ∉ Click **Submit** in footer and enter **Pin** then hit **Enter** on your keyboard

Exercise 15: Entering an Order with different statuses at the same time

- You can order a test with two different statuses at once
  - For example: Lytes now and then repeat next am

- Select the **New Orders** tab and select the **Name** and then **Any Word** buttons

- Fill out required fields
- Click in the order cell and type **Lytes** and a pop-up box will be displayed, click in the box and click **Next** in the footer
- Select **Urgent**
- Select **Daily** - defaults to tomorrow and time specific to site/unit (note there is a 1 in brackets. As we are only adding one day, if more days were needed click the blue edit button and the carrot in the count line to change the number of days ordered)
- Click **Submit and enter pin**