

# Ordering Research Labs for Research Coordinators

- Placing Orders ..... 2**
  - Write new orders ..... 2
  - Enter order details for labs ..... 2
  - Associate diagnoses with orders ..... 3
  - Associate orders with a research study ..... 3
  - Sign the orders ..... 4
  - Edit multiple orders at the same time ..... 4
  - Write new orders in the hospital setting ..... 5
- Customize Your Preference List for Efficient Ordering ..... 6**
  - Create Preference List sections ..... 6
  - Add orders to your Preference List as you place them ..... 7
  - Edit your Preference List ..... 8
  - Copy Preference Lists from other clinicians ..... 8
  - Browse your Preference List to find orders ..... 9

# Placing Orders

This document includes information on placing orders. Please follow your department and specific role's policies for which orders you can and cannot place and when you need cosigns.

## Write new orders

1. In the Visit Taskbar, at the bottom of the screen, click **+ Add Order**.
2. Enter a few letters of the order name in the **Search for new orders** field. Orders that you frequently place appear as you type.
  - a. If you see the order you want as you are typing, select it from the list.
  - b. If you don't see the order you're looking for, press **Enter**. A list of matching orders appears.



Use the keyboard shortcut **Ctrl+O** to open the search field instead of clicking **+Add Order**. Alternatively, you can browse a preference list of orders by clicking 

3. Double-click an order to select it from the list. The order appears in a orders cart to the lower right.
4. Click the order in the orders cart to modify order details, such as the dose of a medication or the reason for a referral. The  icon indicates required items.
5. After updating the order details, click  **Accept**.



To quickly close the order details, right-click anywhere within the window, instead of clicking  **Accept**.

## Enter order details for labs

Select the order status that indicates when and how the order should be released:

- Select a status of **Normal** if the test will occur once, now in the current visit. For example, use this for a POC test to be done during this visit.
- Select a status of **Future** if the test will occur only once, at some point after this visit. For example, use this for a fasting lab that the patient will have drawn in a few days.
- Select a status of **Standing** if the test will occur more than once, like a recurring lab test, for example. Then choose the number of occurrences and the interval at which they will occur.

Select the order class that indicates where the test or procedure will be performed. If you need a specimen to be collected by clinic support staff, select **Clinic Collect**.

If your organization uses reference labs, update the **Resulting Agency** field if the patient needs to go to a different lab. When searching for a lab, you can also look for the appropriate resulting agency in the search window.

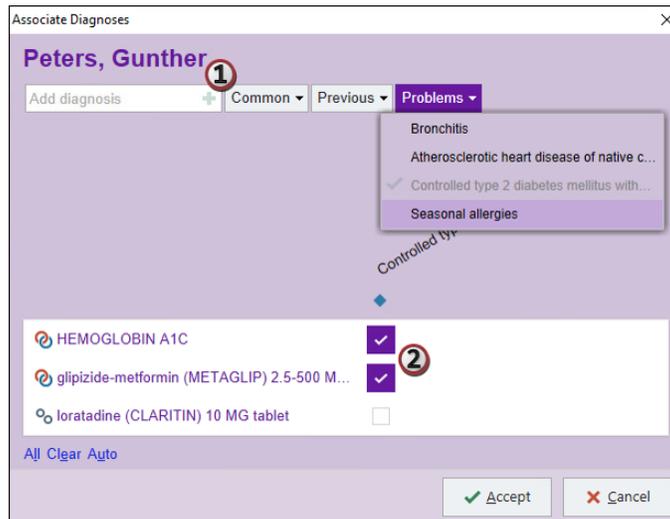


If you place an order frequently, click  to add it to your preference list. See the **Add orders to your Preference List as you place them** topic for more information.

# Associate diagnoses with orders

When you sign orders, you'll be prompted to associate a diagnosis with any orders that require it. If the diagnosis you need isn't listed, search for it in the **Add Diagnosis** field or, select it from the **Common**, **Previous**, or **Problems** dropdown menus.

1. If you want to associate diagnoses with orders before signing them, click  **Dx Association** in the orders cart. Orders with a  icon require an associated diagnosis.
2. Click the cell where an order and diagnosis intersect to associate them. Click **Accept**.



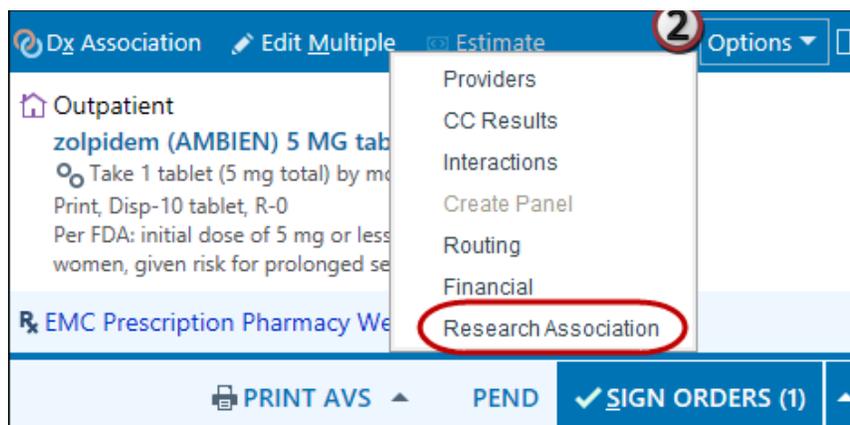
To associate an order with all visit diagnoses, click the order name. To associate a diagnosis with all orders, click the diagnosis name.

# Associate orders with a research study

Associate orders with a research study to indicate the order is being executed as part of the study protocol, regardless of how the lab will be billed.

The patient must be enrolled in a research study before you can associate any orders with it, and you can associate each order with only one study.

1. In the orders cart, click **Research Association** (it may be under the **Options** ▾ button).
2. Click the cells where any appropriate orders intersect with the study to associate them and click **Accept**. An  icon appears next to the order name.



## Sign the orders

Coordinators are able to place orders with a cosignature, meaning the orders will require a final signature by the authorizing provider. However, the orders will be active immediately.

1. When you're done placing orders, click **✔ Sign Orders**.
2. The order mode will default to 'Per Protocol: Cosign Required.'
3. Enter the correct ordering and authorizing provider, who will cosign the order. Add any additional comments and click **Accept**.

The screenshot shows a 'Providers' dialog box with the following fields and options:

- Ordering Information:**
  - Filter:  Nearby
  - Order mode: Per protocol: cosign required
  - Ordering provider: [Empty field with search icon and error indicator]
- Authorizing Providers:**
  - For procedures: [Empty field with search icon and error indicator]
- Entry Information:**
  - Entered by: REESE, MOLLY ELIZABETH
  - Comments: [Empty text area]

Buttons:

## Edit multiple orders at the same time

After entering multiple orders, you might want to make the same change to several of them, like updating the status, class, resulting agency, or interval. To speed things up, edit them at the same time instead of individually. For example, mark a set of related lab orders as Standing and give them an interval of every 12 weeks. Or, quickly change the class to indicate that all the labs will be done at an external lab.

1. In the Visit Taskbar, enter several lab orders and click **✎ Edit Multiple** in the orders cart.
2. In the Edit Multiple window, click **Select All** to quickly select all of your orders. If you also entered medications, select the **Procedures** check box instead.
3. If necessary, clear the check boxes for any orders you don't need to edit.
4. Edit the details of the orders on the right side of the window.
  - For example, enter "External" as the class, "Standing" as the status, "Every 12 weeks" as the interval, "3" as the count, and "m+9" as the expiration date.
  - When changing multiple orders to be Standing or Future, you don't need to update details like the count and expiration date if the defaults in the individual orders are appropriate.
5. Click **✔ Accept** to apply these values to each of the labs you selected and return to the orders cart.
6. If you're done placing orders, click **✔ Sign**.

## Write new orders in the hospital setting

To enter and review orders, select the **Orders** activity tab. Use the Orders sidebar to enter new orders.

1. Enter the first few letters of a lab order in the **Place new orders or order sets** field and press **Enter**.
2. Double-click the correct order to add it to the sidebar.



If you don't see the order you want on the **Preference List** tab, click the **Facility List** tab to see more options. Also, make sure that you're spelling the medication name correctly. When in doubt, enter fewer letters.

3. To edit details of the order, click it. (The details open automatically if information is required.)
4. When you've made all necessary changes to the order, sign it.
5. Be sure the correct order mode is selected, such as Per protocol: cosign required.
6. Enter the ordering and authorizing providers. If you can't find the correct provider, clear the **Filter providers by treatment team members** check box.
7. Click **Accept**. The orders are now active.

## Associate orders with studies

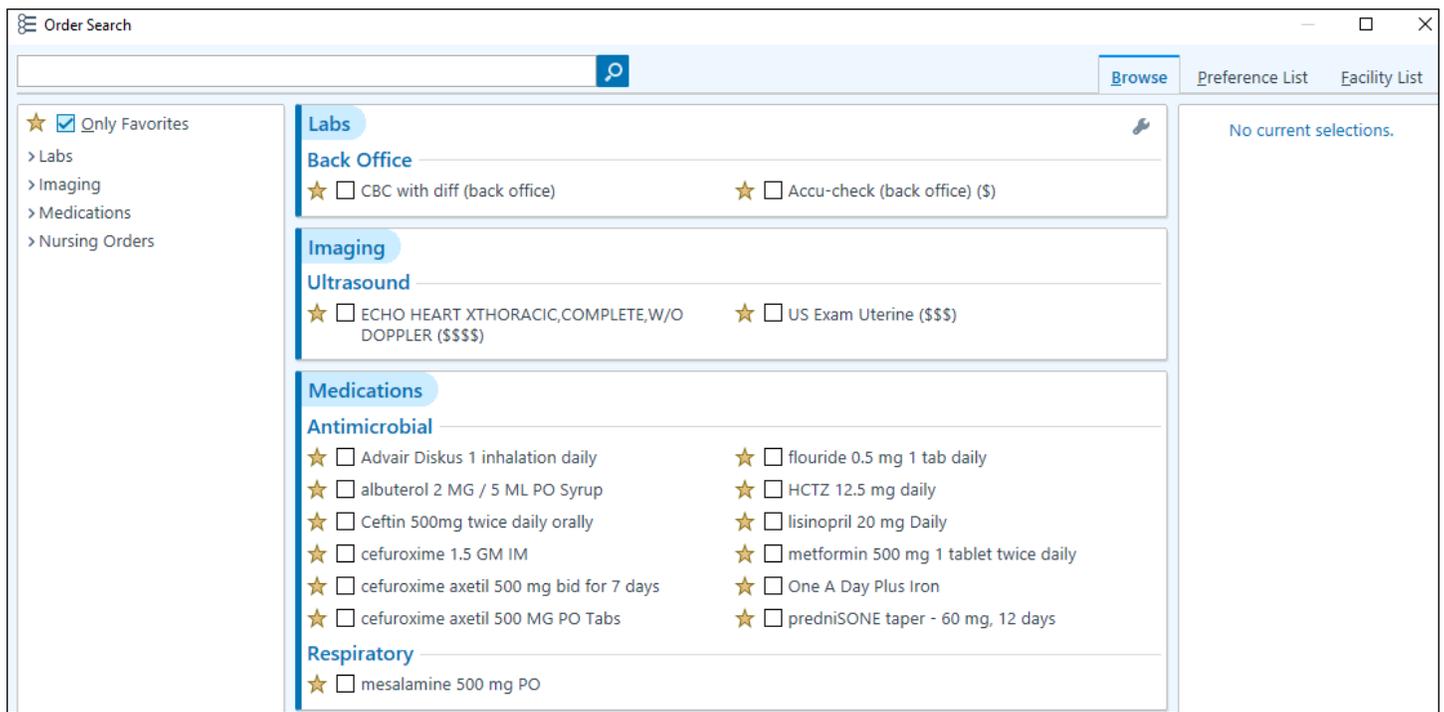
If a patient has multiple upcoming procedures, you can associate orders with the relevant procedure.

1. In the **Orders** tab of the sidebar, enter an order.
2. Click the **Options drop down** towards to upper right of the sidebar.
3. Select **Research Association**.
4. Select the appropriate study.
5. Click **Accept** to continue placing orders.

# Customize Your Preference List for Efficient Ordering

Organizing your preference list effectively can help you place orders more quickly. You can create preference list sections to group orders you often place at the same time, add the orders you use most frequently, and edit the display names so the orders are easier to find. After your preference list is set up, you can browse through the orders during a visit and select the ones you need for the patient.

The preference list below is grouped into general sections, but you can organize however is most useful to you. For example, create a section for diabetes-related orders, hypertension-related orders, and so on.



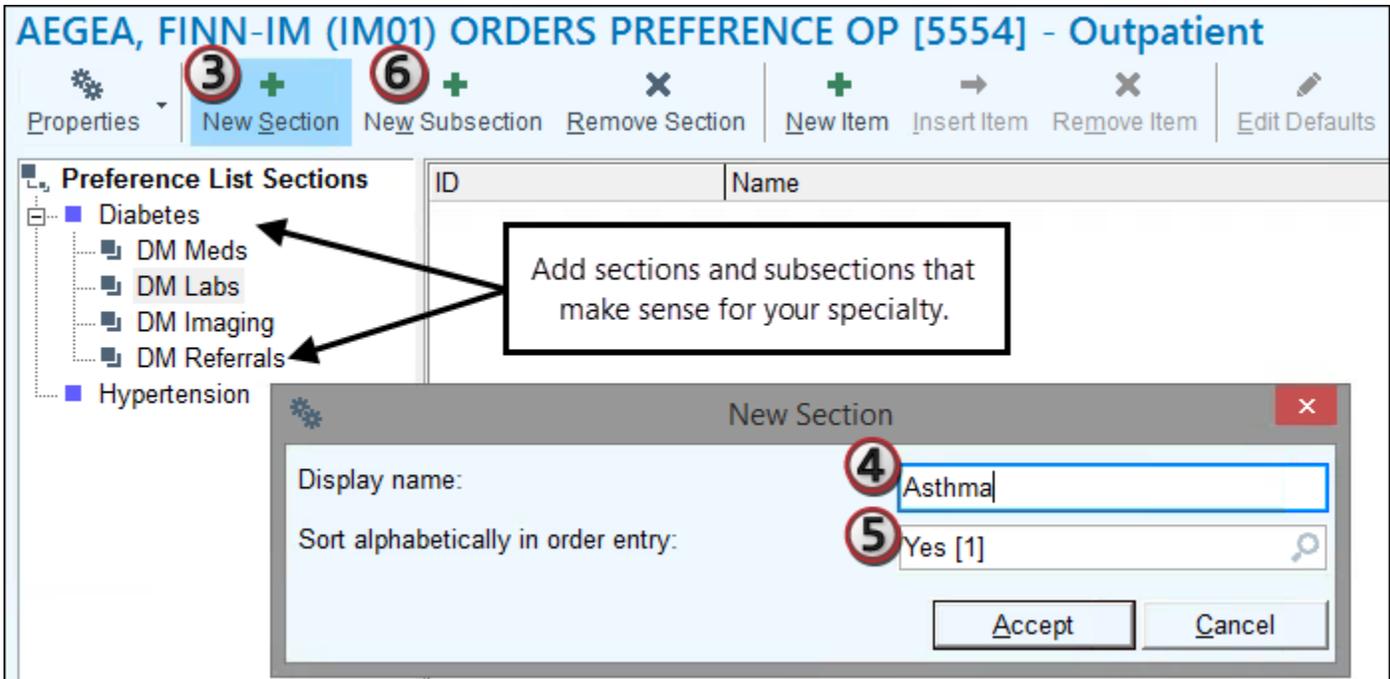
The screenshot shows the 'Order Search' window with a search bar and 'Browse', 'Preference List', and 'Facility List' tabs. The 'Preference List' tab is active, displaying a list of orders grouped into sections. On the left, there is a sidebar with a search icon, a 'Qonly Favorites' checkbox, and a tree view showing 'Labs', 'Imaging', 'Medications', and 'Nursing Orders'. The main content area is divided into sections: 'Labs' (Back Office) with 'CBC with diff (back office)' and 'Accu-check (back office) (\$)'; 'Imaging' (Ultrasound) with 'ECHO HEART XTHORACIC, COMPLETE, W/O DOPPLER (\$\$\$)' and 'US Exam Uterine (\$\$\$)'; 'Medications' (Antimicrobial) with 'Advair Diskus 1 inhalation daily', 'albuterol 2 MG / 5 ML PO Syrup', 'Ceftin 500mg twice daily orally', 'cefuroxime 1.5 GM IM', 'cefuroxime axetil 500 mg bid for 7 days', 'cefuroxime axetil 500 MG PO Tabs', 'flouride 0.5 mg 1 tab daily', 'HCTZ 12.5 mg daily', 'lisinopril 20 mg Daily', 'metformin 500 mg 1 tablet twice daily', 'One A Day Plus Iron', and 'predniSONE taper - 60 mg, 12 days'; and 'Respiratory' with 'mesalamine 500 mg PO'. Each order has a star icon and a checkbox. The right side of the window shows 'No current selections.'

## Create Preference List sections

For efficient preference list setup, first create sections that are useful to you, such as disease or body system sections. Then, when you place a commonly used order, you can save it as a favorite and add it to the correct section in your preference list.

1. Click  **Personalize** on the main toolbar and select  **Preference List Composer**.
2. From the list that appears, double-click your outpatient or inpatient Orders preference list. The list is called "<your name> Orders Preference OP" or <your name> Orders Preference IP."
  - You need to choose the Orders list because, when you place an order and save it as a favorite, those orders are automatically added to the Orders preference list.
3. Click  **New Section** in the toolbar.
4. Enter a display name for the section.
5. Indicate whether you want the orders in this section to appear alphabetically when you are browsing your preference list. Then, click **Accept**.

- To add a subsection, select the section it should appear under, and click **+ New Subsection**. For example, you might add subsections for different studies, or different types of orders you place often.
- Reorganize the sections and subsections in your preference list by dragging and dropping them or by using the **▲** and **▼** buttons at the bottom left of the activity.
- Click **✕** to close the Composer and save your changes. To use your updated preference list, click **☰** in the Visit Taskbar.



## Add orders to your Preference List as you place them

- Search for and select an order as you normally would. Then edit the order details and click **Accept** ✓
- Before signing your order, click **☆** to add it to your preference list.
- In the Add To Preference List window, enter any other details you want to use when you place this order in the future, such as instructions or answers to questions, and click **Accept**. Remember that these details appear only for you, and you can always update them later.
  - In the **Display name** field, enter an easy-to-remember name for the order. The next time you need to place this order, you can search for your saved order using this name.
  - In the **Section** field, enter the section of your preference list in which you want this order to appear. Or, click **New Section** to add another section to your list.

Add To Preference List

Orderable:  Pref List:

Display name:  Section:

**Note**  
Blank values will remain blank when this order is selected from your preference list.

Priority:

Status:

Expected Date:          Approx.

Expires:



Consider adding the same order to your preference list more than once with different display names and order details. For example, you might have one entry called "Cipro UTI 3 days" for Ciprofloxacin UTI with a dose of 250 mg Q12h x 3 days and another called "Cipro Sinus 5 days" for Ciprofloxacin sinusitis with a dose of 500 mg Q12h x 10 days.

## Edit your Preference List

1. Click **Personalize** on the main toolbar and select **Preference List Composer**.
2. From the list that appears, double-click your outpatient or inpatient Orders preference list.
3. In the Preference List Composer, select the preference list section you want to edit.
4. To move an order from one section to another, click the order's name and drag it to the section you want.
  - Orders you starred automatically appear in the My Favorites section, unless you specified a section at that time.
5. To modify details about the order, such as frequency or display name, double-click the order's name. In the window that appears, change the order details as needed and click **Accept**.
6. To change the name of a section or subsection, select that section or subsection and click **Properties** in the toolbar.
7. When you're finished making changes to your preference list, click .

## Copy Preference Lists from other clinicians

Sharing and copying preference lists between clinicians not only saves you time, it also helps spread experience and expertise throughout your organization.

1. Click **Personalize** on the main toolbar and select **Preference List Composer**. The Preference List Selector opens.
2. At the bottom of the screen, click **Copy User**. The PrefList Copy User activity opens.
3. In the **From user** field, enter the name of the user whose preference list you want to copy.
4. Verify that your name appears in the **To user** field.
5. Select a copy option.
  - If you want to add the other user's list to your existing list, select **Merge**.
  - To completely replace your list with the other user's list, select **Replace**.
6. Select the check boxes for the types of lists you want to copy.

- The columns under your name and the other provider's name show how many orders are on each of your preference lists.
  - To see the orders on your colleague's list, double-click the number of items on their list.
7. Click **Copy**. A confirmation window appears. Edits you make in the new list do not affect your colleague's list.

**PrefList Copy User** ? X

Select Users and Ordering Mode

From user: WALKER, DREW [4777] 5

To user: SEEGER, MARTY R. [777] 4

Ordering mode: Both

Copy Option

Merge

Replace

Select Preference List Types

<input type="checkbox"/>	Types	Number of Items for WALKER, DREW	Number of Items for SEEGER, MARTY R.
<input type="checkbox"/>	Charges (Outpatient)	0	0
<input checked="" type="checkbox"/>	Orders (Outpatient)	58	2
<input type="checkbox"/>	Orders (Inpatient)	12	1

6

Double-click the number cell to open the corresponding pref list composer

7 Copy Close

## Browse your Preference List to find orders

After you have set up your preference list, you can speed up ordering by clicking  in the Visit Taskbar and selecting the orders you need from the list.

1. To see only your personal preference list entries, select the **Only Favorites** check box at the top left of the **Browse** tab.
2. Select the orders you want to place and click  **Accept**.



To edit the details of an order on your personal preference list, right-click the order in the Preference List Browser.

© 2019 Epic Systems Corporation. All rights reserved. PROPRIETARY INFORMATION - This item and its contents may not be accessed, used, modified, reproduced, performed, displayed, distributed or disclosed unless and only to the extent expressly authorized by an agreement with Epic. This item is a Commercial Item, as that term is defined at 48 C.F.R. Sec. 2.101. It contains trade secrets and commercial information that are confidential, privileged and exempt from disclosure under the Freedom of Information Act and prohibited from disclosure under the Trade Secrets Act. After Visit Summary, Analyst, App Orchard, ASAP, Beacon, Beaker, BedTime, Bones, Break-the-Glass, Caboodle, Cadence, Canto, Care Everywhere, Charge Router, Chronicles, Clarity, Cogito ergo sum, Cohort, Colleague, Community Connect, Cupid, Epic, EpicCare, EpicCare Link, Epicenter, Epic Earth, EpicLink, EpicWeb, Garden Plot, Good Better Best, Grand Central, Haiku, Happy Together, Healthy Planet, Hyperspace, Kaleidoscope, Kit, Limerick, Lucy, Lumens, MyChart, OpTime, OutReach, Patients Like Mine, Phoenix, Powered by Epic, Prelude, Radar, Radiant, Resolute, Revenue Guardian, Rover, Share Everywhere, SmartForms, Sonnet, Stork, System Pulse, Tapestry, Trove, Welcome, Willow, Wisdom, and With the Patient at Heart are registered trademarks, trademarks, or service marks of Epic Systems Corporation in the United States of America and/or other countries. Other company, product, and service names referenced herein may be trademarks or service marks of their respective owners. Patents Notice: [www.epic.com/patents](http://www.epic.com/patents).