AMBULATORY Quick Start Guide: Outpatient Nurse - Medications and Orders

Contents

Orders

Place or pend an order for a physician

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, 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.

> ℹ️ To narrow down a list of medications, enter the first three letters of a medication's name, followed by the strength. For example, enter "amo500" for amoxicillin 500 mg.

3. Double-click an order to select it from the list, or click **Select and Stay** to search for and select additional orders. All selected orders appear 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**.

> ℹ️ If you place an order frequently, click ☆ to add it to your preference list.

6. Click 🔄 **Associate** to associate your new orders with diagnoses.

7. If you need to add or update a pharmacy, click the pharmacy link in the orders cart.
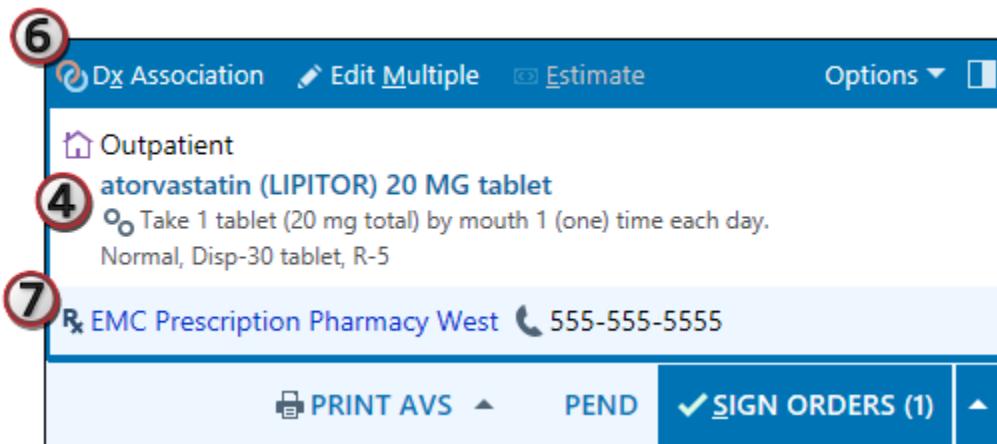
8. Click ✔️ **Sign** or **Pend** to either place the order or pend the order for review by a physician.

Enter order details for a medication

When ordering a medication, be aware of the following important items in the Order Composer:

A. Select the **Mark long-term** check box if the patient is taking this medication for a chronic condition. This ensures that the medication stays on your patient's medication list even beyond the end date for the order. The ⊤ icon appears next to long-term medications on the med list.

B. If you are ordering a brand-name medication and want to ensure it isn't filled as generic, select the **Dispense As Written** check box.

C. Verify the class, which determines how the order will be processed. Click **Normal** to e-prescribe the medication.
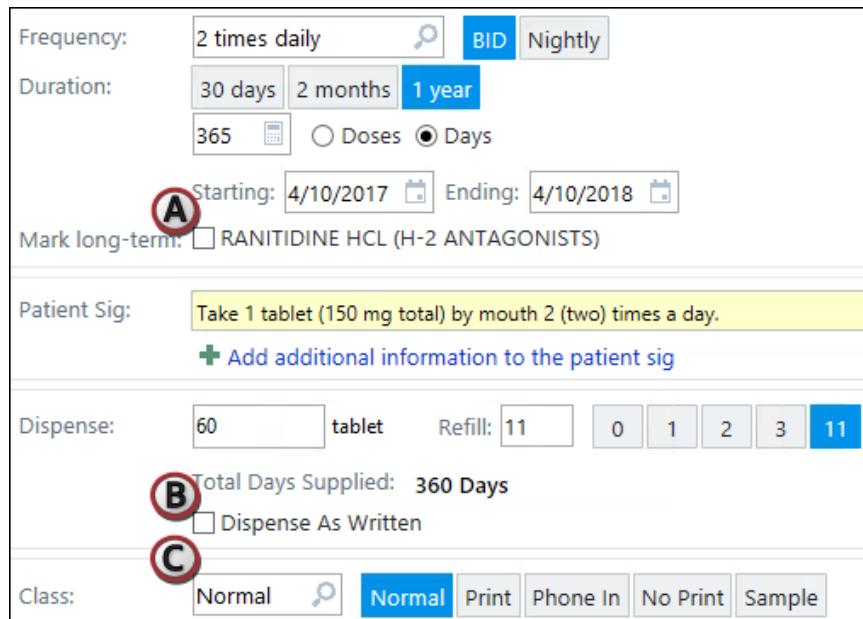
Enter order details for a lab or procedure

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

- Select a status of **Normal** if the test or procedure will occur once, now. For example, use this for a POC test to be done during this visit.
- Select a status of **Future** if the test or procedure 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 or procedure 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 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.

Associate diagnoses with orders

1. 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 **Search for diagnosis** field or, select it from the **Common**, **Previous**, or **Problems** drop-down menus.
   - 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**.
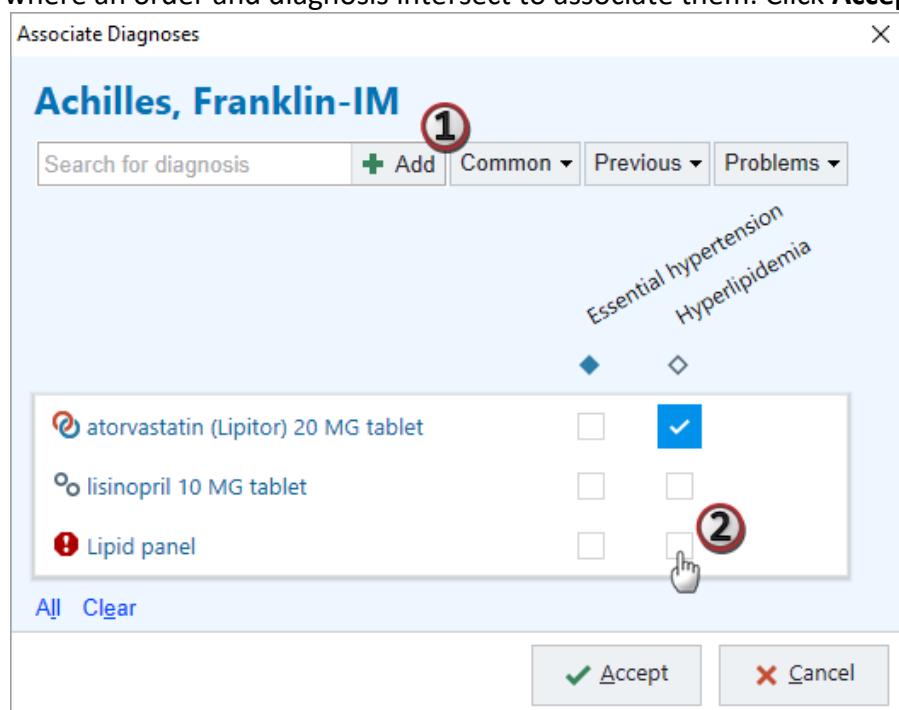
> ℹ️ To associate an order with all visit diagnoses, click the order name. To associate a diagnosis with all orders, click the diagnosis name.

Change diagnosis association for signed orders

After you sign orders, you can add or change your diagnosis association by clicking the 📋 icon on the right side of the visit taskbar or by pressing **Ctrl + Alt + O**. Then, click 🌀 **Associate Signed Orders** and make the necessary changes.

Queue up a medication reorder

1. Open the **Medications & Orders** section of the Plan activity. Current medications automatically appear.
2. Click 🔧 at the top right of the section and select the Med History check box to view discontinued and expired medications. You have the following options for most medications:

   - ↻ - Reorder

- ❏ ✖ - Discontinue and flag for removal
- ❏ ✎ - Change (click the name of the medication to see this option)
  - • With this option, you can modify an existing medication and request a new fill

3. Click the name of the medication to see additional order details.

4. Click ⟳. A new order for the medication appears in the orders cart.

> ℹ️ Save time by reordering multiple medications at once. Right-click in the **Meds & Orders** section and select **Multiple Select**. Check boxes appear to the left of each of the patient's current medications. Select the check boxes for the medications you want to reorder and then click **Reorder # Orders** at the bottom of the list.

Discontinue a medication

Only a Provider will Discontinue a Medication.

Flag for Removal of a medication

Clinical Support will mark medications as Flagged for Removal for the provider to review with the Patient and discontinue when and if appropriate.

1. Open the **Medication Review** section in the Rooming Activity.
2. Click ✖ next to the medication you want to discontinue.
3. Click the **Flag for Removal** button and enter a reason for Removing the Order and click **Accept**. The medication now appears with a (Flag for Review) indicator on the Medication name line.

For reference: Provider's view of a Medication Flagged for Removal:

🏠 atorvastatin (Lipitor) 20 MG tablet   20 mg, Daily   ⑦ ☐ 📌   ⌄

    ✏ Edit   ✖ Cancel Reorder

Flag for Review (Cost of medication) ✖ Discontinue ↺ Keep Active

ⓘ Click 🔧 to create speed buttons for your most commonly used discontinue reasons.

[BJ1]

Cancel, modify, or reprint signed orders

After you sign orders, review them by clicking the 📋 icon on the right side of the visit taskbar or by pressing **Ctrl + Alt + O**. From here:

- Click ✖ to discontinue a medication or cancel other orders. Enter a reason and click **Accept**.
- Click ✏ to adjust the details of an order. The system queues up a new version for you to modify and resign. When you sign the new order, the original order is automatically discontinued.
- Click ⓞ **Associate Signed Orders** to add or change diagnosis association for the signed orders.
- Use any of the reprint options (🖨) as needed[BJ2].
- **If the order has already been signed and you edit or discontinue the order you must contact the Resulting Agency/Pharmacy/Imaging Center as it was most likely sent electronically**

ⓘ If you always want your signed orders in view as you place additional orders during a visit, click 📋 to view your signed orders. Then, click the wrench at the top right of the signed orders bubble and select **Always show signed orders with unsigned orders**.

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 all are the same type[BJ3]. 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, and it is appropriate for you to do so, [BJ4]click ✔ **Sign**.
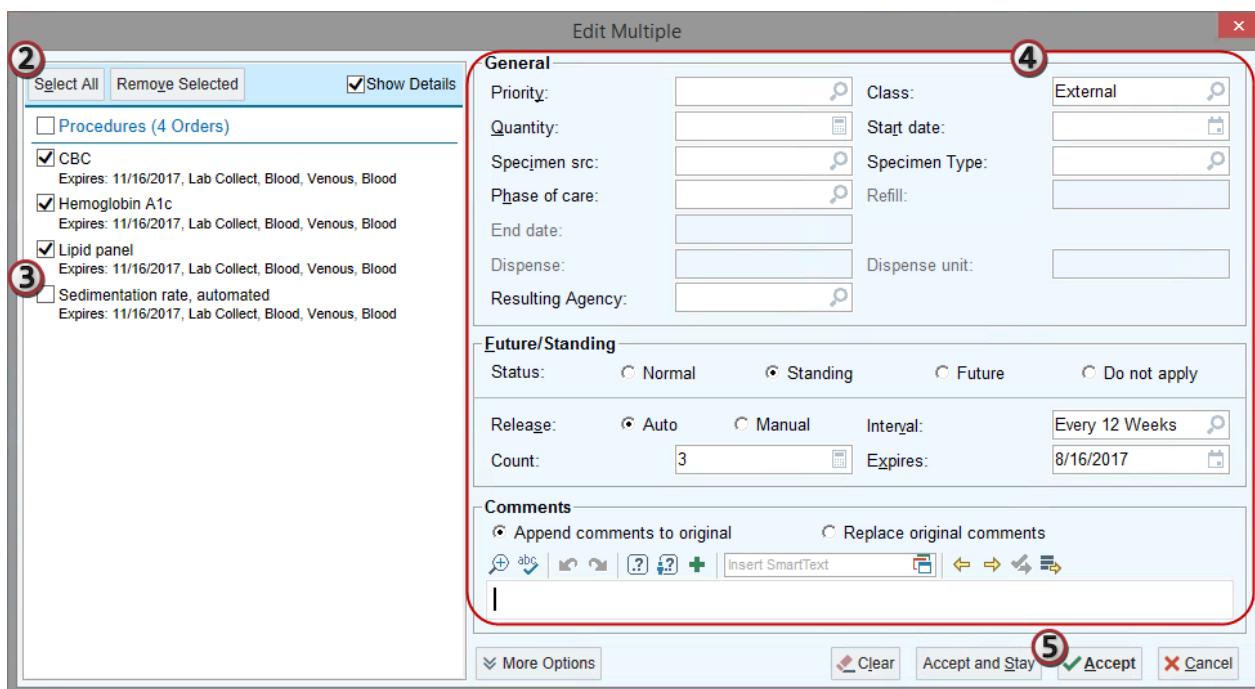
Customize Your Preference List for Efficient Ordering

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.

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 🔧 **My Tools** on the main toolbar and select 🔧 **Preference List Composer**.
2. From the list that appears, double-click your Orders (Outpatient) or Orders (Inpatient) preference list.

   ▫ 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.**

6. To add a subsection, select the section it should appear under, and click ➕ **New Subsection.** For example, you might add subsections for meds, labs, and imaging to various disease sections.

7. Reorganize the sections and subsections in your preference list by dragging and dropping them or by using the ▲**Section Up** and ▼**Section Down** buttons at the bottom left of the activity.

8. Click ✖ to close the Composer and save your changes. To use your updated preference list, click ≣ in the Visit Taskbar.
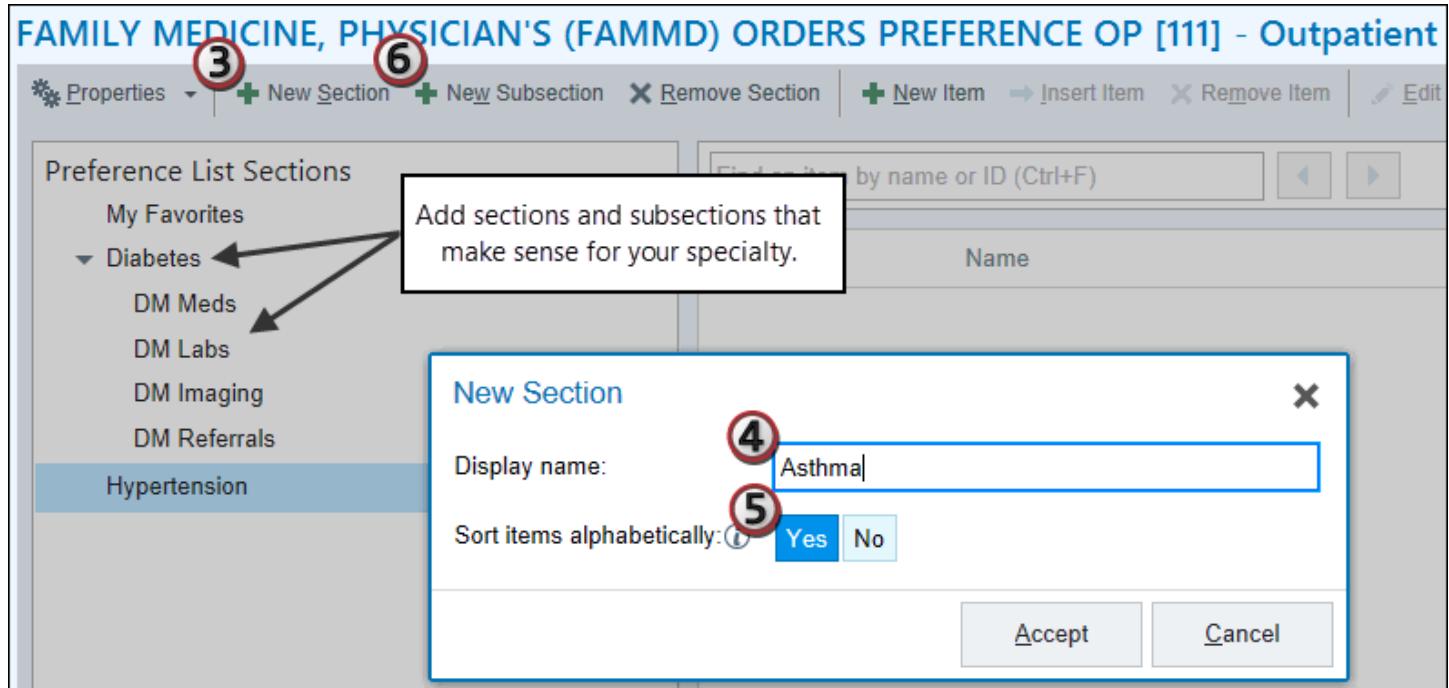
Add orders to your Preference List as you place them

1. Search for and select an order as you normally would. Then edit the order details and click ✔ **Accept**.

2. Before signing your order, click ☆ to add it to your preference list.

3. 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.

   a. 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.

   b. 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: Ⓐ Lipid panel [80061 (CPT(R))]		Pref List: Ⓑ Orders	
Display name: Lipid panel - future		Section: Labs	New

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

Priority: Routine

Status: Normal | Standing | **Future**

Expected Date: S+14 | Today | Tomorrow | 1 Week | **2 Weeks** | 1 Month | 3 Months | 6 Months | ☑ Approx.

Expires: S+365 | 1 Month | 2 Months | 3 Months | 4 Months | 6 Months | **1 Year** | 18 Months

> ⓘ 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**[BJ5] on the main toolbar and select 🔧 **Preference List Composer**.
2. From the list that appears, double-click your Orders (Outpatient) or Orders (Inpatient) 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, right-click that section or subsection and select **Properties**.
7. When you're finished making changes to your preference list, click ✖ on the Workbench Workspace tab.

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**[BJ6] on the main toolbar and select 🔧 **Preference List Composer**. The Preference List Selector opens.
2. At the bottom of the screen, click **Copy User Lists**. The Copy User Preference Lists 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.** Edits you make in the new list do not affect your colleague's list.

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.

Create order panels

Save time searching for orders that you commonly place together, such as a set of labs. Instead of searching one-by-one for these orders, create an order panel.

1. Within a patient's chart, search for the orders that you would like in the order panel.
2. After the orders are queued up for signing, click **Options** ▼ in the Order Cart toolbar, [BJ7]and select **Create Panel**.

> ℹ️ You cannot include a Clinic Administered Medication order in an Order Panel.[BJ8]

3. In the **Display name** field, enter an easy-to-remember name for the panel.

   ▫ Optionally, in the **Section** field, enter the section of your preference list in which you want this order to appear. Or, click **New** to add another section to your list.

4. If needed, edit the details of each order.
5. Click **Accept**.
6. To use your order panel in a patient's chart, search for the order panel on your preference list by completion matching or browsing, just as you would for an individual order.

Edit or make a copy of an order panel

After you've created an order panel, you can update order details or remove orders from it. You can also create a copy of the order panel and make updates to it. You cannot add orders to an existing order panel.[BJ9]

1. Click 🔲 in the Visit Taskbar, and select the **Only Favorites** check box.
2. Right-click the order panel.

   ▫ To edit the current order panel, select **Edit Preference List Entry**.
   ▫ To create a copy of the order panel, select **Add to Preference List** and choose a list to put the copy on.
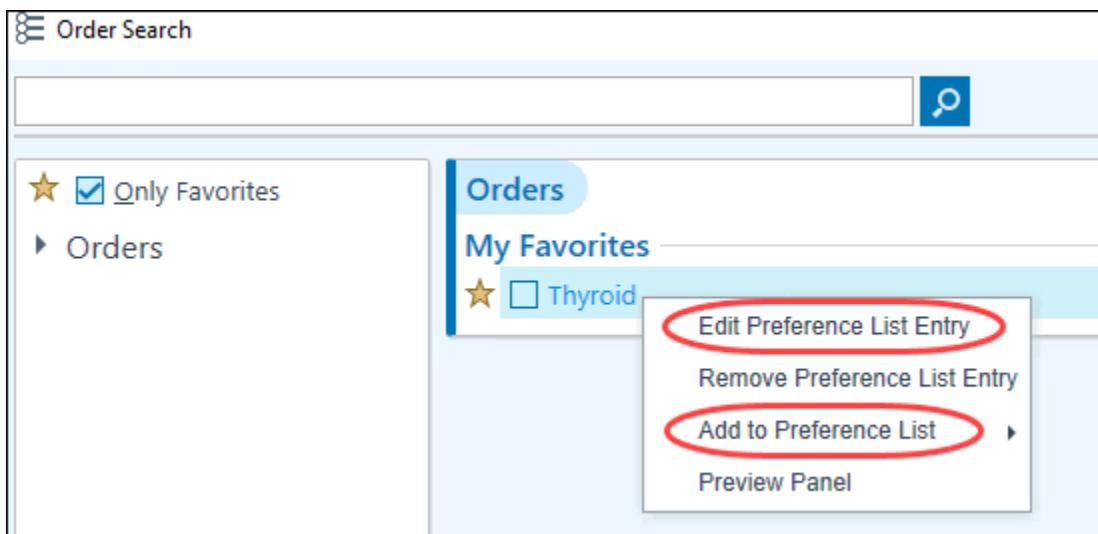
3. Edit order details or remove orders.

▫ If you need to add orders, you must create a new order panel.

Results and Administrations

If a patient needs a point of care test or an immunization before she leaves, a 📎 (for point of care tests) or 💉 (for immunizations) appears in the **Visit Orders** column on your schedule.

Enter results for a point of care test

1. Open the Enter/Edit Results activity, and then select the POCT to result:

    a. From the Schedule, single click a patient to open the Visit Orders report, and then click the **Enter Results** link below the name of the test.
    b. Order and sign a point-of-care test within a patient's encounter, and then use Chart Search to open **Enter/Edit Results** activity.

> ℹ️ To save time, click the Star next to Enter/Edit Results option in the Activities Toolbar drop-down list ▼ to include it in your Activity Toolbar.[BJ10]

2. In the **Specimen** section, enter the specimen type and collection information.
3. On the **Components** tab at the bottom of the screen, enter the procedure components and values.
4. In the **Result** section, enter the date and time and whether the result was abnormal, and change the status to **Final**. Marking the result as Final sends a Results In Basket message and makes the result appear on the **Labs** tab in Chart Review.
5. Sometimes, a test is performed on a patient, but you don't get an adequate result and the intended outcome isn't achieved, like if patients don't fast. When this occurs, click the **Unsuccessful Attempt** checkbox so the system doesn't treat the result as clinically complete.
6. Click **Accept**.

ℹ️	Billing will automatically be included when the result has been Accepted with a status of **Final.**[BJ11]
ℹ️	Use date and time shortcuts: t=today, w=week, m=month, and y=year. For times, t and n=the current time. You can also use the **+** and **-** keys to calculate a date or time. For example, enter "t-30" to enter a time of 30 minutes ago.

ℹ️	With the ☑Send Results message checkbox seleced, an In Basket message will be generated to the ordering provider once the result is Final.[BJ12]

Attach a scan to results

You can also use the Enter/Edit Results activity to scan a document and associate it with an order.

1. In a patient's chart, use Chart Search to open Enter/Edit Results.
2. Select an order and click ✏ **Edit**.
3. Click 🖺 **Scan**.
4. Fill out the **Description** and **Doc type** fields.

   □   For example, for lab results, choose a doc type of Lab Result Scan.

5. Attach a scanned image.

   a. Click 🖺**Acquire** to capture an image with your scanner.
   b. **Click** 📂 **Import** to choose a file from your computer.

6. After you attach an image, click 💾 **Save doc,** and then close the window.
7. Enter additional information about the results if needed, and then click Accept. The scanned image is now attached to the result, and can be viewed in reports, such as those in the Labs tab of Chart Review.

> ℹ You can also attach an image by copying it, and then clicking 📋 **Paste** in the Result Scan window.

[BJ13]
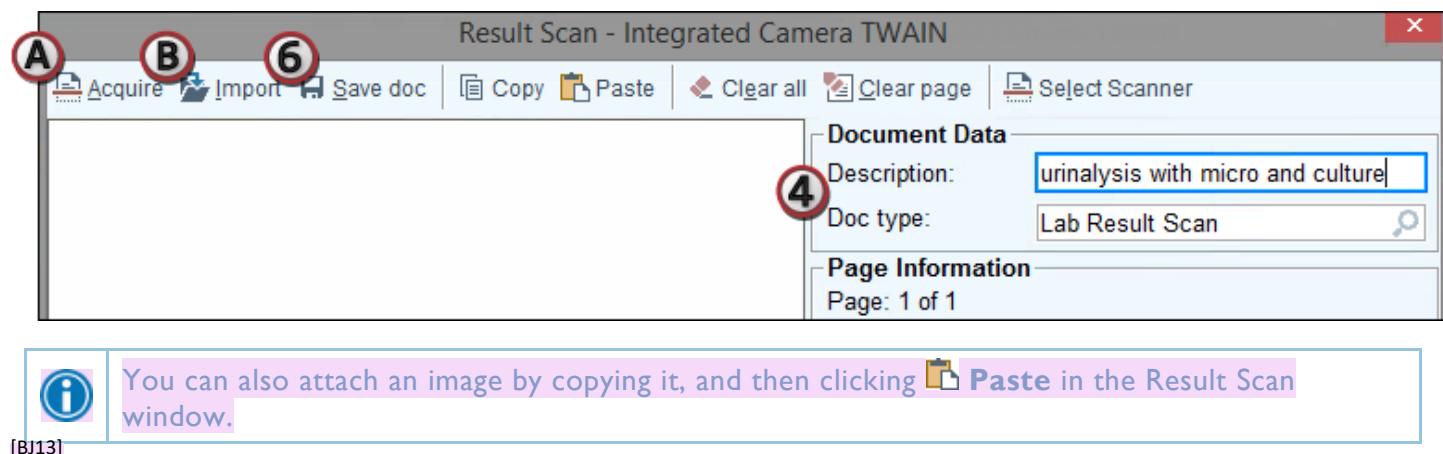
Document an immunization administration

When a patient has an immunization order that needs to be administered, an icon appears in the Visit Orders column on the schedule.

1. Open the Immunizations activity:

   a. From the Schedule, single click on the patient to open the Visit Orders report, and then click ↗ **Administer** hyperlink [BJ14]for the immunization order.
   b. In the patient's chart, go to the **Immunizations** activity. Immunizations that have been ordered, but are not yet documented as administered, appear in the **Incomplete Administrations** section.

   • You might need to use Chart Search to open the **Immunizations** activity.

> **ℹ** Save time by clicking the Star next to Immunizations option in the Activities Toolbar drop-down list ▼ to include it in your Activity Toolbar.[BJ15]

2. Click **⚕ Administer** and enter details about the immunization, such as the site.
3. Bar code scanning can be utilized to automatically complete the required medication details, including Lot # and NDC. If not available, it can be manually entered.[BJ16]
4. Answer all [BJ17]questions about the immunization, such as whether the patient was counseled by the physician for accurate documentation and billing[BJ18].
5. If you are interrupted while entering required details about an immunization, click **Accept as Incomplete** to save what you've entered and finish later.
6. When you're done, click **Accept**.

⚠ Incomplete Administrations

DTaP / Hep B / IPV   ⚕ Administer   ⌛ Defer   ✕ Delete

> **ℹ** To document historical immunization administrations, click 🕘 **Historical Admins** in the Immunization activity, enter the appropriate information, and click **Accept**.

Document a medication administration

You can tell that a patient needs a medication administration when 🛏 appears in the **Notifications** column on your schedule.

1. Double-click the 🛏 in the **Notifications** column to open the **MAR** activity. Medications that are scheduled to be administered appear in the MAR activity.

   □ Within a patient's chart, you can also use Chart Search to open the MAR.

> **ℹ** Save time by clicking the Star next to MAR option in the Activities Toolbar drop-down list ▼ to include it in your Activity Toolbar.[BJ19]

2. Click the due date or time link for the medication you need to administer.

   □ To see all due times or document an unscheduled administration, click **New Administration**. Then, click the due time you want to document, or click ➕ **New MAR Action** to document an unscheduled administration, like a PRN dose.

MAR

↻ | 🗐 Report 📝 MAR Note 👥 Legend 🖊 Show All Actions

Show All Details | Show All Admins 🔧 ▤

January 12, 2020 - March 12, 2020

lidocaine (Xylocaine) 1 % injection 50 mg ⧉   Ordered Dose: 5 mL : Admin Dose: 50 mg : Injection : Once
   Ordered Admin
        Amount: 50 mg = 5 mL
   Concentration: 1,000 mg/100 mL

② Due 02/11/20 at 1445

New Administration

3. Adjust the administration details as needed, and enter any required information, such as the site at which you gave an injection.
4. Bar code scanning can be utilized to automatically complete the required medication details, including Lot # and NDC. If not available, it can be manually entered.[BJ20]
5. In the Outpatient Billing section, enter the NDC from the package.

   a. If the patient brought the medication with him, omit the NDC and select the **Patient Supplied?** check box.
   b. If a medication has multiple components, you see a separate section for each component. To change the medication component you're administering to an equivalent component, click the component name or the 🖊 next to it.
   c. Add components, such as the base for a mixture, by clicking ➕**Add Medication Component**.

6. Any warnings appear near the information you need to act on, so you can quickly resolve them. Scan or document all your medication components, resolve any warnings, and then administer the medication.
7. When you're done, click **Accept**.

🗐 Administration Details

Action	Date	Time	Comment
Given 🔍	02/11/2020 📅	1457 🕐	

Route	Site
Injection	🔍

Dose
50 | mg 🔍
Order Concentration: 10 mg/mL

💠 Outpatient Billing

Ⓐ ☐ Patient Supplied?

LIDOCAINE HCL 1 % IJ SOLN 🖊 Ⓑ   ✕

NDC	Lot Number	Expiration Date	Billing Code
④ ❗ 🔍		📅	LIDOCAINE I... 🔍

Ⓒ ➕ Add Medication Component

18

> - Click **Show All Details** at the top right of the activity to see additional info about each order, such as the Admin Amount.
> - To see all administrations, click **Show All Admins** at the top right of the activity.
> - Click 🔧 to tailor your view of the MAR, including how orders are sorted, the amount of information that appears, and the font size.

Add a medication component

1. While documenting an administration, click ➕ **Add Medication Component**.
2. Enter the medication component's NDC or search for it by name. If you don't know which components you can select, click 🔍 in either field to see the list of components or NDCs that match the order.
3. To remove a component, click ✖.

Collect specimens

When a patient has an order that requires specimen collection, an icon appears in the Visit Orders column on the schedule.

1. Single click on the patient's appointment to open the Visit Orders report, and then click **Collect Specimen**.

2. In the Collect specimens for [patient] window, review the collection information for the tests:

   - Refer to the Collection Sequence section for which tubes to use and the collection order.
   - Make sure the correct tests are listed.
   - Remove unneeded tests by clicking the ✖ next to the lab.
   - Identify any special collection instructions.

3. Click 🖨 **Print Labels** in the lower right.
4. Use the Bar Code Scanning in your practice, or manually click the Scan the label or click to document the collection hyperlink to collect individual specimens.[BJ21]
5. Verify the collection information and update it as needed.
6. Click ✔ **Accept**.

Collect specimens for Nadir-NURSE Acanthite, Male, 46 yrs, MRN:281959   ✕

Blood specimens

ⓘ PURPLE 18C-171H0027   Lab: EMC CLINIC LAB ✕

④ ⚠ Scan the label or click to document the collection

Blood, Venous

CBC
        Invert immediately and gently mix with anticoagulant.

⊍ Collection Sequence
    ⓘ PURPLE
    18C-171H0027.1

②

Labels printed to: **NULL DEVICE**

🖶   ✓   ✕
Reprint Labels   Accept   Cancel

Version #	Purpose of Change	Author	Date of Change
1.0	Initial Creation		