

## Sign and Held Orders Talking Points

Epic provides a Sign and Held functionality, which is different than SCM system tools. This function in Epic allows providers to queue up orders for the future as the patient moves through phases of care and sign them all at once for later activation by nursing (i.e. ED to Inpatient Admission).

### Important Notes:

- If the order is placed for the phase of care that the patient is currently in, the order will auto default to Signed and be active (except for NBR & BMSCH Pacu).
- If the order is placed for a phase of care that the patient is ***not*** currently in, the order will auto default to Signed and Held and will require a clinician to release the orders for them to be active.

### Objective:

- 1) In Epic, paper orders will not be allowed. Providers must enter their orders directly into Epic.
- 2) In SCM, all admission orders on an ED patient become active as soon as the providers signs them. In Epic, the provider will Sign and Hold these admission orders which the IP nurse will release when the patient moves to their unit. If the patient does not move to the inpatient floor within 4 hours of orders being signed and held, ED nursing will receive an alert to review and release select orders for them to act upon.
- 3) Epic will never automatically release orders for you – a clinician needs to purposefully review and release orders associated with a phase of care. Epic reminds clinicians that there are orders that are Signed and Held needing review.

### How it Works



Open patients' chart to the Nursing Overview Report in the Summary Activity

Note the Orange banner indicating this patient has Signed and Held Orders

RN will have to click "Signed & Held" within the Orders activity to access these orders.

The screenshot shows the Epic Orders interface. The top navigation bar includes tabs for Summary, Chart Review, MAR, Flowsheets, Notes, Education, Care Plan, Orders, Charges, Navigators, and a red box highlights the 'Orders' tab. Below the navigation bar, the 'Orders' section is active, and the 'Signed & Held' sub-tab is selected. A link 'Click Here to Release Signed and Held Orders' is highlighted with a red box. Below this, a table lists 'Signed and Held Orders' with columns for ID, Description, Signed By, When, and Reason.

ID	Description	Signed By	When	Reason
506218	Full code-Continuous	Sam Stethoscope, MD	10/28/21 1258	RN Will Release
506220	Notify MD-Until discontinued	Sam Stethoscope, MD	10/28/21 1258	RN Will Release
506223	Strict Bed Rest-Until discontinued	Sam Stethoscope, MD	10/28/21 1258	RN Will Release
506225	Adult NPO diet-Diet effective now	Sam Stethoscope, MD	10/28/21 1258	RN Will Release

On the **Signed & Held** tab, orders are grouped by phase of care and then by procedure. Select the orders you want to release and click **Release**. To select all orders in your phase of care for a specific procedure, select the box next to the procedure's name.

The screenshot shows the Epic Orders interface with the 'Signed & Held' tab selected. The 'View by' dropdown is set to 'Phase of Care'. The 'Signed & Held Orders - No Phase of Care' group is selected, showing 11 orders. A red box highlights the 'Signed & Held Orders - No Phase of Care' group. Below this, a list of orders is displayed, each with a checkbox and a 'Modify All' button. The first order, 'morphine injection 2 mg', is checked. The 'Release' button at the bottom right is highlighted with a red box.

Order	Phase of Care	Count
Signed & Held Orders - Preprocedure	0 orders	
Signed & Held Orders - Recovery (only)	0 orders	
Signed & Held Orders - Phase II/On Unit	0 orders	
<b>Signed &amp; Held Orders - No Phase of Care</b>	<b>11 orders</b>	

Order	Phase of Care	Count
<input checked="" type="checkbox"/> Orders from Sam Stethoscope, MD	0 orders	
<input type="checkbox"/> Orders from Sam Stethoscope, MD	0 orders	
<input type="checkbox"/> Orders from Sam Stethoscope, MD	0 orders	

Order	Phase of Care	Count
<input checked="" type="checkbox"/> morphine injection 2 mg	2 mg, intravenous, Once, On Fri 10/29/21 at 0700, For 1 dose	New
<input type="checkbox"/> pantoprazole (ProtoNix) 80 mg in sodium chloride 0.9 % 100 mL IVPB	80 mg, intravenous, at 400 mL/hr, Administer over 15 Minutes, Once, On Thu 10/28/21 at 1350, For 1 dose	New
<input type="checkbox"/> Adult NPO diet	Diet effective now, Starting on Thu 10/28/21 at 1252, Until Specified	New
<input type="checkbox"/> CBC and differential	Once, On Thu 10/28/21 at 1252, For 1 occurrence	New
<input type="checkbox"/> Daily weights	Specimen Types - Blood; Specimen Sources - Blood, Venous; New collection	New
<input type="checkbox"/> Full code	Daily, First occurrence on Thu 10/28/21 at 1252	New
<input type="checkbox"/> Intake and Output	Every shift, First occurrence on Thu 10/28/21 at 1252	New
<input type="checkbox"/> Notify MD	Until discontinued, Starting on Thu 10/28/21 at 1251, Until Specified	New
<input type="checkbox"/> pantoprazole (ProtoNix) 80 mg in sodium chloride 0.9 % 250 mL (0.32 mg/mL) infusion	8 mg/hr (25 mL/hr), intravenous, Continuous, Starting on Thu 10/28/21 at 1300	New
<input type="checkbox"/> Strict Bed Rest	Start immediately after IVPB bolus	New
<input type="checkbox"/> Type and screen	Until discontinued, Starting on Thu 10/28/21 at 1251, Until Specified	New
<input type="checkbox"/>	Activity Level: Strict Bed Rest	New
<input type="checkbox"/>	Once, On Thu 10/28/21 at 1252, For 1 occurrence	New
<input type="checkbox"/>	Specimen Types - Blood; Specimen Sources - Blood, Venous; New collection	New

**Learn More**

**Learning Home Dashboard: Inpatient Clinical Learning Home Dashboard**

Date/First initial. Last name

Remember – Tip sheets on the Learning Home Dashboard.

The changes identified in this document are significant to your hospital. Please reference the following Tip Sheets:

- Orders
- Signed and Held Orders

Note that the information on the Learning Home Dashboard is current. If you download or print a copy of the Tip Sheet, it will may not reflect the most up to date information. Make it a habit to view Tip Sheets within Epic frequently.

## Remember



## Playground

Once you complete your training, you may access the Epic Playground environment. Use this environment to learn and practice the new Epic workflows.

Focusing on the changes identified in this document will help your hospital in the successful implementation.

As part of the Playground environment, you will have access to the Learning Home Dashboard to learn about other changes.

## You Can Also



## View the Change Video

A demonstration was held and recorded for this workflow. The demonstration is located in NetLearning for the user to locate and assign to themselves using the "Learning Opportunities (Enroll) button. To locate the recording for this change, and all other recorded demonstrations, search for "Change Management" and select the appropriate demonstration.

**Questions** can be sent to your informatics representative. If they cannot answer the question, they will partner with you to find the answer with the EpicTogether Team.

Version #	Purpose of Change	Author	Date of Change
1.0	Initial Creation	Selena McClinton Jordan Musleh	4/21/2022

--	--	--	--