From the Office of Clinical Informatics

Oncology Project
Provider Regimen Pre-Loading Checklist

September 8, 2023

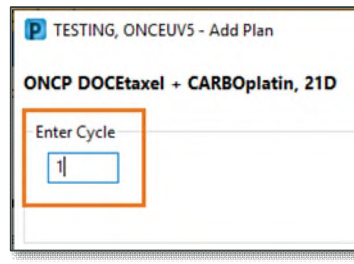
Reference the following checklist when pre-loading regimens in patient's charts.

Provider Regimen Pre-Loading Checklist

- **Patient Regimen Pre-Load Overview**
  - Managers will communicate with the individual providers the list of patients that are to be completed for the week.
  - Provider will review the report and access the patient's chart using the FIN provided. This will be a Non-Patient encounter created on the new location. The provider will place regimen orders for the patient using the current PDF orders as the guide of what orders to enter.
  - Managers will check-in with the provider frequently through each day to identify patients who have been pre-loaded.
  - Managers will update TransIT frequently with the updates from providers by checking the box for MD Order/Review.
  - Once the provider has entered orders, Pharmacy will begin steps in reviewing the orders.
  - Pharmacy will communicate to the provider via email with questions or issues with the orders.
- **Ordering Regimens**
  - Best practice is to add a **This Visit** diagnosis to the patient's chart at the beginning of the visit.
  - Advantage in doing so is it will simplify other tasks within the visit, such as associating a diagnosis to orders, when staging the patient, populating patient education topics, and populating to the assessment and plan.
  - In the **Add Orders** window:
    - On the left side under **Diagnoses & Problems**, select the check box next to the diagnosis to associate to the regimen orders.
    - This is important because if the diagnosis is not associated to the regimen now, providers will have additional steps when signing the orders.
  - Searching for Regimens vs PowerPlans
    - Think of a regimen being the book and the PowerPlans (cycles) are the chapters.
      - Oncology regimen orders have a regimen icon with a prefix of **ONC** followed by the regimen name.
      - PowerPlans have the PowerPlan icon with a prefix of **ONCP** followed by the PowerPlan name.
      - ****Always order the Regimen – NOT the PowerPlan*****

- **Current CPOE Lab Orders**
  - When pre-loading regimens to patient's charts, cleanup CPOE lab orders on the chart placed.
    - Keep lab orders needed until 10/8/23.
    - For **ALL** other lab orders after 10/8/23, **Cancel/DC** these orders. Use the labs as the part of the PowerPlan in patients on chemotherapy.
    - Also remove old CPOE lab orders to declutter and prevent confusion in the future.

- **Pre-Loading Regimens**



  - When entering regimen orders for pre-loading – Skip to the cycle number the patient is on and ensure the date for the cycle is correct (e.g., cycle 5).
  - For patients with very high cycle numbers:
    - Skip all the cycles just before the last cycle.
    - Click start on the last cycle.
    - Change the cycle number to the one the patient is on
    - Click extend and enter the number of cycles wanting to extend.
    - The newly added cycles are updated to the correct cycle number.

- **How to Skip a Day of Treatment in the Add Plan Window**
  - This would be used if while pre-loading and an order is not needed on a certain day of treatment for the cycle of treatment (e.g., it is a 3 day cycle – Days 1, 8, 15 and the order is not needed on Day 15).
  - Another example: Patient getting Day 1 prior to go-live (10/9/23) and getting Day 8 and 15 after go-live. Day 1 would be skipped and days 8 and 15 would be kept.

- **Placing Cycle Orders**
  - There are pre-selected orders in each of the phases of all regimens. Use the same process for any regimen:
    - Review **each phase** and select/deselect the desired orders using the checkbox.
    - **Modify** order details by right-clicking and selecting **Modify**.
    - Add orders not listed by clicking **Add to Phase**. This ensures the order is included with all the other regimen orders.
    - Orders added to the phase will go to the **Additional Orders/Indicators** section.

- **Dosing Calculator**
  - Make **Dose Adjustments** to medications, as applicable.
  - Providers should <u>**NOT**</u> select Cancel in the Dose Calculator window. Always select **Apply Dose**.
- **Updating Scheduling Location for Treatment Orders**
  - When placing regimen orders, if the patient is going to receive treatment at another location – the provider will update the **Scheduling Location** field in the applicable day(s) of treatment to reflect where the patient needs to be scheduled for those days (i.e., Grant 6, an outside facility, etc.)
- **Multiple Regimens for the Same Patient**
  - When using two or more IV regimens for the same patient, pay attention to labs orders and follow-up orders to prevent duplicate as all regimens have them.
- **Use the Treatment Calendar to request future cycle appointments in advance if not placing future cycle orders.**
- **Ordering Future Cycles**
  - It is the providers preference for ordering a certain # of cycles ahead.
  - If ordering 1-2 cycles ahead, follow the same process as above by clicking the start button for the applicable cycles and placing orders.
- **Nurse Practitioner Only**
  - When applicable (all new Cycle 1 starts and new oncology NPs during first year of working at NL Cancer Care Brewer), send regimen orders for co-signature. To do so:
    - When ordering a regimen and starting a cycle, in the **Additional Review Settings** section, check the box for **Review Required**.
    - In the **Review Provider** field – enter the appropriate provider's name.
    - Click **OK**.