From the Office of Health Informatics

Quick Reference Guide (QRG) Place Orders and Procedures

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This Quick Reference Guide (QRG) reviews the steps for placing orders and procedures.

Common Buttons & Icons

	Orders for Signature tray
New Folder...	New Folder button
	Binoculars icon
	Filter view icon
	Merge view icon
	Light-bulb icon
	Refresh icon
	Menu Expansion arrow
	Add icon
	Calendar icon

Add New Orders

➢ **From the Provider View Quick Orders window in the patient's chart:**

STEP 1: Scroll down to locate the **New Order Entry** component.

NOTE: **Remember, it is best practice to enter the "This Visit" diagnosis(es) prior to placing orders and review the correct encounter has been selected.**

STEP 2: Type the name of the order in the **New Order Entry Search** field; then press **Enter**.

STEP 3: Click **Order** from the search results list.

STEP 4: Click the **Orders for Signature** tray. The Orders for Signature window opens.

STEP 5: Associate the order with a diagnosis by clicking the appropriate laboratory/diagnosis field.

NOTE: **Right-click the laboratory/diagnosis field to remove or reorder the diagnosis as needed.**

STEP 6: Click **Modify Order Details** if there needs to be modification.

STEP 7: Click the order that needs modification.

STEP 8: Fill in the fields as appropriate with any modifications.

STEP 9: Click **Sign**.

Creating a Favorite Order

- **From the Orders for Signature window:**

STEP 1: Right-click the order to favorite.

STEP 2: Click **Add To Favorites.** The **Add Favorite** window opens.

STEP 3: Click the folder to store the order.

NOTE: Create a new folder to store favorite orders using the New Folder button.

STEP 4: Click **OK.**

NOTE: Access favorites by clicking the personal filter in the New Order Entry component.

Place Recurring Orders

- **From the Provider View Quick Orders in the patient chart:**

STEP 1: Click the order that is needed.

STEP 2: Click the **Order for Signature** tray. The Orders for Signature window opens.

STEP 3: Click the order/diagnosis field to associate the diagnosis.

STEP 4: Click **Modify Order Details.**

STEP 5: Click the order to open the details.

STEP 6: Click the **Yes** radio button for Orders for a future visit.

STEP 7: Click the **Calendar** icon. The Future Order Details window opens.

STEP 8: Click the **Recurring Order** radio button.

STEP 9: Type in the numbers for the timing of recurring order as appropriate.

STEP 10: Click **OK.**

STEP 11: Click **Sign.**

STEP 12: Click the **New Order Entry** component header to review the recurring order.

STEP 13: Click the left arrow icon for the order just set as recurring. The recurring orders should be listed.

Place a Procedure Referral

- **From the Provider View Quick Orders page in the patient chart:**

STEP 1: Click **Referral Order** in the Procedure Referral Requests.

STEP 2: Click the **Orders for Signature** tray. The Orders for Signature window opens.

STEP 3: Click the order/diagnosis field to associate the diagnosis as appropriate.

STEP 4: Click **Modify Order Details.**

STEP 5: Click the **Referral Order**.

STEP 6: Click the **Medical Service** dropdown arrow and click the desired service.

STEP 7: Click **Reason for Referral** free text box and type in the reason for the referral.

STEP 8: Click **Referral Type** dropdown arrow.

STEP 9: Click the appropriate referral type as needed.

STEP 10: Click the **Refer to Binoculars** icon. The Referral Provider Lookup window opens.

STEP 11: Type in the name of the location to search for the referral.

STEP 12: Select the **Include External Practice** check box if needed.

STEP 13: Click the desired location for the referral.

STEP 14: Click **Accept**.

STEP 15: Fill in all other referral order details as appropriate.

STEP 16: Click **Sign**.

Place an In-Office Procedure Order

- **From the Provider View Quick Orders page of the patient's chart:**

STEP 1: Click the appropriate order from the specialty Procedure Requests component.

STEP 2: Click the **Orders for Signature** tray.

STEP 3: Click Test/Procedure/ diagnosis field to associate the diagnosis with the order.

STEP 4: Click the **Modify Order Details** button.

STEP 5: Click the procedure order.

STEP 6: Click the **Time frame** dropdown arrow.

STEP 7: Click the appropriate selection for when the procedure should be completed.

STEP 8: Click the **Reason for Procedure** free text field and enter a reason; then press **Enter**.

STEP 9: Fill in any other pertinent information for the order as appropriate.

STEP 10: Click **Sign**.

Placing a PowerPlan

- **From the Provider View Quick Orders page of the patient's chart:**

STEP 1: Click the **Search** field in the New Order Entry component.

STEP 2: Type the name of the desired PowerPlan.

STEP 3: Click to select the appropriate plan from the populated list.

STEP 4: Click the **Orders for Signature** tray.

STEP 5: Click the **PowerPlans/diagnosis** cell to associate the plan with the diagnosis.

STEP 6: Click the **Modify Order Details** button.

STEP 7: Select the desired orders within the PowerPlan.

NOTE: **When selecting Orders:**

- **Selecting a linked order will automatically select all orders that are associated with that order. Manually deselect ones that are not need.**
- **Holding down the CTRL key and selecting multiple orders allows modification of the details one time for all the selected orders.**

STEP 8: Right-click a selected order.

NOTE: **To filter/merge orders:**

- **Click the Filter icon above the list of orders. Only selected orders display.**
- **Click the Merge icon above the list of orders. This allows views of the selected orders alongside other orders in the patient's chart or other orders in the PowerPlan.**

STEP 9: Click **Modify**.

STEP 10: Document the **Signs/Symptoms/Duration/Location** field as needed; then press **Enter**.

STEP 11: Document the **Question** to be answered field; then press **Enter**.

STEP 12: Click the **Study Performed At** dropdown arrow.

STEP 13: Click the appropriate location.

STEP 14: Click the appropriate action for the PowerPlan, either **Initiate Now** or **Plan for Later**.

NOTE: When placing a PowerPlan:

- **Use the Save as My Favorite button to save these orders as a favorite as warranted.**
- **Use the Initiate Now button to place the PowerPlan orders.**
- **Use the Plan for Later button holds these orders for initiation later.**
- **A lightbulb icon will display next to PowerPlan orders that are initiated but not activated.**

STEP 15: Click **Orders for Signature**.

STEP 16: Click **Sign**.

STEP 17: Click the **New Order Entry** component header to open the Order Profile and review the PowerPlan.

Modify a Placed Order

➢ **From the Provider View Quick Orders page in the patient's chart:**

STEP 1: Click the **New Order Entry** component header.

STEP 2: Right-click the order that needs modification.

STEP 3: Click **Modify**.

STEP 4: Modify the details as appropriate.

STEP 5: Click **Orders for Signature**.

STEP 6: Click **Sign**.

STEP 7: Click the **Refresh** icon.

Cancel a Placed Order

➢ **From the Orders view in the patient's chart:**

STEP 1: Click the **Menu Expansion** arrow.

STEP 2: Navigate to the order heading in the Orders menu, then clicking the header.

STEP 3: Right-click the order that needs to be cancelled. Order details are displayed.

STEP 4: Click **Cancel/DC**.

STEP 5: Click the **Cancel Reason** dropdown arrow.

STEP 6: Choose the appropriate cancel reason.

STEP 7: Click **Orders for Signature**.

STEP 8: Click **Sign**.

STEP 9: Click the **Refresh** icon.

Place an Order from the Orders View

➢ **From the Orders view in the patient's chart:**

STEP 1: Click the **Add** icon.

STEP 2: Click the appropriate order category folder.

STEP 3: Click the appropriate sub-folder for the needed order.

STEP 4: Click the needed order.

NOTE: **Another way to search is using the Search field at the top of the right-side pane.**

- **Click the Search field and enter the desired order.**
- **Click the dropdown options as appropriate.**
- **Click Enter.**
- **Click the needed order.**

STEP 5: Click **Done**.

STEP 6: Enter the **Signs/Symptoms/Duration/Location** field information.

STEP 7: Enter the **Question to be Answered** field information.

STEP 8: If needed, click **Yes** in the Future/Study/Date radio button.

STEP 9: Click the **Calendar** icon to add the date for the study if it is for a future date. The **Future Order Details** window opens.

STEP 10: Fill-in the order details fields as appropriate.

STEP 11: Click **OK**.

STEP 12: Scroll down to the **Study Performed** At dropdown arrow.

STEP 13: Click the appropriate location.

NOTE: **For outside EMHS locations, click the Performed Outside EMHS Yes radio button.**

STEP 14: Click the **Diagnoses** tab in the order details scratch pad to address missing details.

STEP 15: Associate the order to the appropriate diagnosis(es).

STEP 16: Click **Sign**.

STEP 17: Click the **Refresh** icon.

NOTE: The order will be listed at Future On-Hold until the findings are documented.

Activate an Order

- **From the Orders view in the patient's chart:**

STEP 1: Right-click the **On-Hold order** to activate.

STEP 2: Click **Activate**.

STEP 3: Review the Start Date and Time and adjust as needed.

NOTE: The Start Date and Time, defaults to the current date and time.

STEP 4: Click **Orders for Signature**.

STEP 5: Click **Sign**.

STEP 6: Click the **Refresh** icon.

Document an Order as Completed

- **From the Orders view in the patient's chart:**

STEP 1: Right-click the order to be completed.

STEP 2: Click **Complete**.

STEP 3: Click the **Refresh** icon to update the Status of the order to Completed.