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 you are on the correct encounter.

STEP 2: Type the name of the order you are looking for 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: You can 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:**

<u>STEP 1</u>:   Right-click the order you want to favorite.

<u>STEP 2</u>:   Click **Add To Favorites.** The **Add Favorite** window opens.

<u>STEP 3</u>:   Click the folder where you want to store the order.

<u>NOTE</u>:   You can create a new folder to store your favorite orders using the New Folder button.

<u>STEP 4</u>:   Click **OK.**

<u>NOTE</u>:   You can access your 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:**

<u>STEP 1</u>:   Click the order that is needed.

<u>STEP 2</u>:   Click the **Order for Signature** tray. The Orders for Signature window opens.

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

<u>STEP 4</u>:   Click **Modify Order Details.**

<u>STEP 5</u>:   Click the order to open the details.

<u>STEP 6</u>:   Click the **Yes** radio button for Orders for a future visit.

<u>STEP 7</u>:   Click the **Calendar** icon. The Future Order Details window opens.

<u>STEP 8</u>:   Click the **Recurring Order** radio button.

<u>STEP 9</u>:   Type in the numbers for the timing of recurring order as appropriate.

<u>STEP 10</u>:   Click **OK.**

<u>STEP 11</u>:   Click **Sign.**

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

<u>STEP 13</u>:   Click the left arrow icon for the order you 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:**

<u>STEP 1</u>:   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** drop-down arrow and click the service you need.

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

STEP 8:   Click **Referral Type** drop-down 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 you want to search for the referral.

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

STEP 13:   Click the location you want 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** drop-down 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 PowerPlan you need.

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 orders within the PowerPlan that you need.

NOTE: When selecting Orders:
- Selecting a linked order will automatically select all orders that are associated with that order. You can manually deselect ones you do not need.
- Holding down the [CTRL] key and select multiple orders allows you to modify 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 you to view 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** drop-down 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** drop-down 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 order you are looking for.
- Click the drop-down 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 drop-down arrow.

STEP 13:   Click the appropriate location.

NOTE: For outside EMHS locations you can 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:**

<u>STEP 1</u>:   Right-click the On-Hold order you need activate.

<u>STEP 2</u>:   Click Activate.

<u>STEP 3</u>:   Review the Start Date and Time and adjust as needed.

<u>NOTE</u>:   The Start Date and Time, defaults to the current date and time.

<u>STEP 4</u>:   Click Orders for Signature.

<u>STEP 5</u>:   Click Sign.

<u>STEP 6</u>:   Click the Refresh icon.

Document an Order as Completed

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

<u>STEP 1</u>:   Right-click the order to be completed.

<u>STEP 2</u>:   Click **Complete**.

<u>STEP 3</u>:   Click the Refresh icon to update the Status of the order to Completed.