

Standing Order Sets Manual

Standing Order Sets Admin Page Anatomy

- Assign/Unassign Employee

- View Standing Order Set

- Edit Standing Order Set

- Activate Standing Order Set

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- Clone Standing Order Set (Forthcoming)*

Standing Order Set Page Anatomy

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- Free Text Entry Category Anatomy

Order Set Tab Anatomy

Add Individual Order

- Add Text Entry Individual Order

- Add Medication Individual Order

- Add Create Prescription Individual Order

Log Actions

Standing Order Sets Admin Page Anatomy

ID	Name	Employee	Date Activated	Date Deactivated	View		
1	Treatment A	N/A		12/01/2016 10:50 PM	View		
2	Treatment B	11	08/01/2016 01:34 PM		View		Deactivate
3	Metabolic decompensation	17	05/10/2015 01:28 PM		View		Deactivate
4	hypoglycemia	N/A	05/10/2015 01:28 PM	12/01/2016 10:41 PM	View		
5	Broken Wrist	N/A	05/10/2015 01:28 PM	11/10/2015 03:00 PM	View		
6	Chest Pain	N/A	05/10/2015 01:28 PM	11/10/2015 03:00 PM	View		
8	Severe Headache	13	12/01/2016 10:41 PM		View		Deactivate
10	Sword injury	12	12/01/2016 10:41 PM		View		Deactivate
12	sacha test	15	12/01/2016 10:41 PM		View		Deactivate
21	New standing order1	N/A	15/01/2016 10:58 AM	15/01/2016 10:58 AM	View		
33	Jay's Standing Order Set	0			View	Edit	Activate
34	Jay's Standing Order Set	0			View	Edit	Activate
35	sacha's New sos!@#%\$	13			View	Edit	Activate
36	Jay test 2	0			View	Edit	Activate
37	Intoxication	N/A	18/01/2016 03:12 PM	18/01/2016 03:12 PM	View		

15 items per page
 1 - 15 of 71 items

New Standing Order Set

- ID Column:** This column displays the ID of the Standing Order Set.
- Name Column:** This is the name of the Standing Order Set. This name will be displayed in the Order Set dropdown, in the Order Standing Order Sets workflow.
- Assigned Employees Column:** This column displays the number of employees who are assigned to the standing order set. For an employee to order a given Standing Order Set, or have a given Standing Order set ordered on their behalf, they must be assigned to the Standing Order Set. Clicking on the number displayed in this column brings the user to the assignment/unassignment page for the specific Standing Order Set.
- Date Activated Column:** This column displays the date/time stamp on which the Standing Order Set was activated.
- Date Deactivated Column:** This column displays the date/time stamp on which the Standing Order Set was deactivated.
- View Button:** This button is displayed on all Standing Order Sets where the user's Profile Code has **Security Matrix: SOSView** checked. If the user clicks this button, they initiate the **Standing Order Sets View** workflow
- Edit Button:** When the user clicks this button, they initiate the Standing Order Sets Edit/Update workflow. This button is displayed if two conditions are true:
 - the Standing Order Set is in DRAFT status AND
 - the user's Profile Code has **Security Matrix: SOSUpdate** checked.
- Activate Button:** This button will be displayed if two conditions are true:
 - the Standing Order Set is in DRAFT status, AND

- the user's Profile Code has **Security Matrix: SOSActivate** checked.
- When the user clicks this button, the Standing Order Set will be activated. Standing Order Sets can only be ordered if:
- the selected provider is assigned to the Standing Order Set, AND
 - the Standing Order Set is in ACTIVE status.
9. **Deactivate Button:** If the user clicks this button, the Standing Order Sets status will be updated to DEACTIVATED, and will no longer be able to be ordered. This button is displayed if two conditions are true:
 - the Standing Order Set is in an ACTIVE status, AND
 - the user's Profile Code has **Security Matrix: SOSDeactivate** checked.
 10. **Pagination Links:** If the user clicks on a specific page number, the grid will display results from that corresponding grid page.
 - [>] button advances to the results from the next grid page
 - [>>] button advances to the results on the last grid page
 - [<] button advances to results from the previous grid page
 - [<<] button advances to the results from the first grid page
 11. **Number of Standing Order Sets Per Page:** This dropdown sets the number of Standing Order Sets that will be displayed per grid page. This value defaults to 15, but can be updated to 5, 10, 20, 30, or 50.
 12. **Standing Order Sets Displayed Out of Total Standing Order Sets:** This label displays the range of standing order sets that are currently being displayed, out of the total number of standing order sets in the system. For example, **1-15 of 71 items** means that the user is viewing the first 15 Standing Order Sets, and there are a total of 71 Standing Order Sets in the system.
 13. **New Standing Order Set Button:** This button is displayed when the user's Profile Code has **Security Matrix: SOSUpdate** checked. When the user clicks this button, they will initiate the **New Standing Order Set** workflow.

Assign/Unassign Employee Workflow

Assign/Unassign Employee	
Use	Assign Employees to Standing Order sets. An Employee must be assigned to a Standing Order Set before they can order it, or it can be ordered on their behalf
Required Security Matrix Rights	SOSAssignEmployee
Partner Configs	Use Standing Order Sets

Steps to Complete Workflow

1. Navigate to **Admin** tab > **Standing Order Sets Admin**.
2. Click the numeric link in the **Employee** column. This causes the **Employee Assignment** page to be displayed.

Employee Assignment: Adolescent Bi-Polar Show Assigned Only

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z ALL NAME / ID Active Inactive Filter

[Assign All](#) | [Unassign All](#)

Last Name	First Name	Assign / Unassign
Admin	KB	Unassign
Bacher	Kim	Assign
Barba	Oscar	Assign
Beck	Rick	Unassign
Bejarano	Renzo	Assign
Cat	Tom	Assign
Couch	Ashley	Assign
Datia	Venu	Assign
DeLaGarza	Osvaldo	Assign
dibiase	jim	Unassign
Forma	John	Assign
Frigo	Michelle mi Bel	Assign
Gallardo	Mario	Unassign
Garza	Luis	Assign
Johnson	John	Assign

15 Items per page 1 - 15 of 32 items

- To Assign an Employee, click the Employee's corresponding **Assign** button.
- To Unassign an Employee, click the Employee's corresponding **Unassign** button.

Please note: Only Employees who have **Employees: Is Doctor** checked will be available for assignment.

View Standing Order Set

View Standing Order Set	
Use	View Standing Order Sets in a read-only format. This is useful for staff who should be allowed to see, but not edit, existing standing order sets
Required Security Matrix Rights	SOSView
Partner Configs	Use Standing Order Sets

Steps to Complete Workflow

1. Navigate to **Admin** tab > **Standing Order Sets Admin**.
2. Click the **View** button for the Standing Order Set.
3. Click on the specific **Category** you want to view.

The screenshot shows a web application interface. At the top, there's a 'Consult (0)' dropdown. Below it, the 'Therapy (2)' category is expanded, showing a search bar with a 'Clear' button and a 'Search' button. Under the 'Order' section, two items are listed: 'Individual Therapy X1 Weekly' and 'Family Therapy X1 Weekly'. Each item has a 'View' button to its right. At the bottom, there's a 'Psych (0)' dropdown.

4. The category will expand, displaying the individual order grid, as well as the display area.
5. Click the **View** button on the desired individual order.
6. The order will be displayed in the display area.

This screenshot is similar to the previous one, but the 'Individual Therapy X1 Weekly' order is now selected and highlighted. The 'View' button next to it is also highlighted. The 'Family Therapy X1 Weekly' item remains below it.

7. If you would like to view a different **Individual Order** that is part of the same category, either:
 - a. click the **Clear** button, then the **View** button of the desired individual order, or
 - b. simply click the **View** button of the desired individual order.

Edit Standing Order Set

View Standing Order Set	
Use	Edit/Update existing standing order sets. Only Standing Order Sets in a DRAFT status can be edited/updated
Required Security Matrix Rights	SOSUpdate
Partner Configs	Use Standing Order Sets

Steps to Complete Workflow

1. Navigate to **Admin** tab > **Standing Order Sets Admin**.
2. Click the **Edit** button for the Standing Order Set.
3. Click the **Category** for the individual order that you want to edit.

The screenshot shows a web interface titled "Therapy (2)". It features a large text input field at the top, followed by "Cancel" and "Add Therapy Order" buttons, and a search bar. Below this is an "Order" section containing a table with two rows: "Individual Therapy X1 Weekly" and "Family Therapy X1 Weekly". Each row has an "Edit" button and a "Delete" button (represented by an 'x' icon).

4. Click the **Edit** button for the desired individual order.

This screenshot is identical to the previous one, showing the "Therapy (2)" interface with the "Order" section. The "Individual Therapy X1 Weekly" entry is highlighted, and the "Edit" button is visible.

5. The data from the individual order is now displayed in the order entry text field.
6. Modify the individual order as desired or needed.

This screenshot shows the "Therapy (2)" interface after editing. The large text input field now contains the text: "Individual Therapy X 3 weekly for 2 weeks, and then 1X weekly with additional sessions as needed". The "Order" section remains the same, with "Individual Therapy X1 Weekly" highlighted.

7. Click the **Update XX Order** button. (**XX** is the Category type selected.)
8. The individual order is now updated in the system.

The screenshot shows a web interface titled "Therapy (2)". It features a large text input field at the top. Below this field are two buttons: "Cancel" and "Add Therapy Order". A search bar with a magnifying glass icon and the word "Search" is also present. Below the search bar is a table with the following structure:

Order	
Individual Therapy X 3 weekly for 2 weeks, and then 1X weekly with additional sessions as needed	<div>Edit × Delete</div>
Family Therapy X1 Weekly	<div>Edit × Delete</div>

Please note: If the user edits a **Create Prescription** or **Add Medication** individual order, all fields are editable, and the data is populated into the appropriate fields.

Activate Standing Order Set

Activate Standing Order Set	
Use	Activate a Standing Order Set. Only Standing Order Sets that are activated can be ordered by providers, or on behalf of providers.
Required Security Matrix Rights	SOSActivate
Partner Configs	Use Standing Order Sets

Steps to Complete Workflow

1. Navigate to **Admin** tab > **Standing Order Sets Admin.**
2. Click the **Activate** button for the Standing Order Set.
3. A popup confirmation will be displayed.

Standing Order Sets Administration

ID	Name	Employee	Date Activated	Date Deactivated			
98	ADHD - Teen	0			View	Edit	Activate
99	Intake Orders	1			View	Edit	Activate

Navigation: 1 2 3 4 5 6 15 Items per page 76 - 77 of 77 items

New Standing Order Set

Activate Order Set

Are you sure you want to Activate **Intake Orders**?
This action can not be undone.

Cancel Activate

4. Click the **Activate** button to activate the Standing Order Set.
5. The popup goes away, and the Standing Order Set is now activated.

ID	Name	Employee	Date Activated	Date Deactivated			
98	ADHD - Teen	0			View	Edit	Activate
99	Intake Orders	1	20/01/2016 04:56 AM		View		Deactivate

Navigation: 1 2 3 4 5 6 15 Items per page 76 - 77 of 77 items

6. The activation date of the Standing Order Set is displayed in the **Date Activated** field.

Please note: in the BETA version of Standing Order Sets, all logged date/time stamps (including HIPAA Log, Admin Log, and Activation/Deactivation Date) are displayed as UTC date/time stamps.

Deactivate Standing Order Set

Deactivate Standing Order Set	
Use	Deactivate a Standing Order Set. Standing Order Sets should be deactivated when an agency sunsets the Standing Order Set, i.e., no longer wants providers to order it.
Required Security Matrix Rights	SOSDeactivate
Partner Configs	Use Standing Order Sets

Steps to Complete Workflow

1. Navigate to **Admin** tab > **Standing Order Sets Admin**.
2. Click the **Deactivate** button to deactivate the Standing Order Set.
3. A popup confirmation is displayed.

The screenshot shows the 'Standing Order Sets Administration' page. A table lists two sets: 'ADHD - Teen' (ID 98) and 'Intake Orders' (ID 99). The 'Intake Orders' set is currently active, with an employee count of 1 and a date activated of 20/01/2016 09:56 AM. A 'Deactivate' button is visible next to it. A confirmation popup is displayed over the table, asking 'Are you sure you want to deactivate Intake Orders? This action can not be undone.' with 'Cancel' and 'Deactivate' options.

4. Click the **Deactivate** button to deactivate the Standing Order Set.
5. The popup disappears, and the Standing Order Set is now deactivated.

The screenshot shows the 'Standing Order Sets Administration' page after deactivation. The 'Intake Orders' set (ID 99) now has a 'Date Deactivated' of 20/01/2016 05:15 AM and the 'Employee' field is now 'N/A'. The 'Deactivate' button has been replaced by a 'View' button. The 'ADHD - Teen' set (ID 98) remains active with an employee count of 0.

6. The deactivation date of the Standing Order Set is displayed in the **Date Deactivated** field.
7. The **Employee Count/Assignment/Unassignment** link is no longer displayed, and is replaced with an **N/A** label. This action occurs because the employee count is no longer relevant, and no additional employees should be assigned to the Standing Order Set, as it can no longer be ordered.

Please note: for the BETA version of Standing Order Sets, all logged date/time stamps (including HIPAA Log, Admin Log, and Activation/Deactivation date) are displayed as UTC date/time stamps.

Standing Order Sets Page Anatomy

Standing Order Set Name Page Anatomy



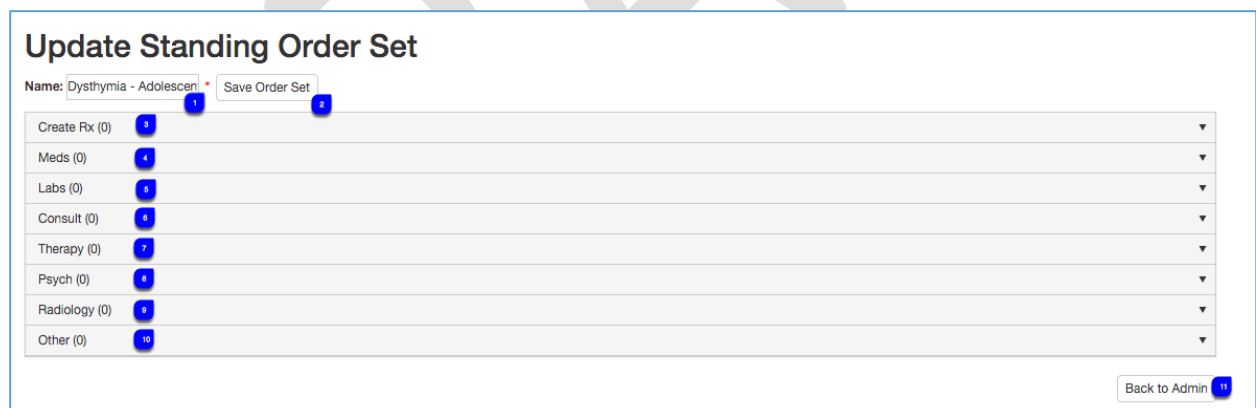
New Standing Order Set

Type in name of the new standing order set * 1

2 Create 3 Cancel

1. **Standing Order Set Name Field:** This field is where the user enters the name of the Standing Order Set. A name must be provided for a Standing Order Set before it can be created.
2. **Create Button:** If the user clicks this button, and the Standing Order Set name field is populated, then the user will be progressed to the next page in the New Standing Order Set workflow.
3. **Cancel Button:** If the user clicks this button, they will be returned to the Standing Order Sets Admin page.

Standing Order Set Page Anatomy



Update Standing Order Set

Name: Dysthymia - Adolescent * 1 2 Save Order Set

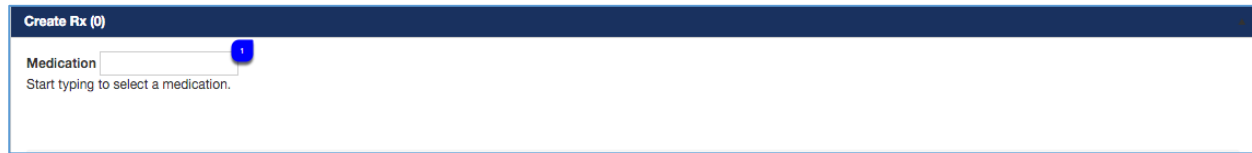
3 Create Rx (0) 4 Meds (0) 5 Labs (0) 6 Consult (0) 7 Therapy (0) 8 Psych (0) 9 Radiology (0) 10 Other (0)

11 Back to Admin

1. **Name Field:** This is an editable field that allows for the updating of the Standing Order Set's name.
2. **Save Standing Order Set Button:** If the user clicks this button, the name of the Standing Order Set will be updated to the value that is currently displayed in the **Name** field.
3. **Create Rx Accordion Option:** If the user clicks on this accordion option, the accordion control will expand to display the **Create Rx** individual order category. Please note that the number to the right of **Create Rx** corresponds to the number of individual orders of this type currently existing for the Standing Order Set.

4. **Create Meds Accordion Option:** If the user clicks on this accordion option, the accordion control will expand to display the **Add Med** individual order category. Please note that the number to the right of **Meds** corresponds to the number of individual orders of this type currently existing for the Standing Order Set.
5. **Labs Accordion Option:** If the user clicks on this accordion option, the accordion control will expand to display the **Labs** individual order category. Please note that the number to the right of **Labs** corresponds to the number of individual orders of this type currently existing for the Standing Order Set.
6. **Consult Accordion Option:** If the user clicks on this accordion option, the accordion control will expand to display the **Consult** individual order category. Please note that the number to the right of **Consult** corresponds to the number of individual orders of this type currently existing for the Standing Order Set.
7. **Therapy Accordion Option:** If the user clicks on this accordion option, the accordion control will expand to display the **Therapy** individual order category. Please note that the number to the right of **Therapy** corresponds to the number of individual orders of this type currently existing for the Standing Order Set.
8. **Psych Accordion Option:** If the user clicks on this accordion option, the accordion control will expand to display the **Psych** individual order category. Please note that the number to the right of **Psych** corresponds to the number of individual orders of this type currently existing for the Standing Order Set.
9. **Radiology Accordion Option:** If the user clicks on this accordion option, the accordion control will expand to display the **Radiology** individual order category. Please note that the number to the right of **Radiology** corresponds to the number of individual orders of this type currently existing for the Standing Order Set.
10. **Other Accordion Option:** If the user clicks on this accordion option, the accordion control will expand to display the **Other** individual order category. Please note that the number to the right of **Other** corresponds to the number of individual orders of this type currently existing for the Standing Order Set.
11. **Back to Admin Button:** If the user clicks this button, they will return to the **Standing Order Sets Admin** page.

Standing Order Set: Create Rx Category Anatomy Medication Picker

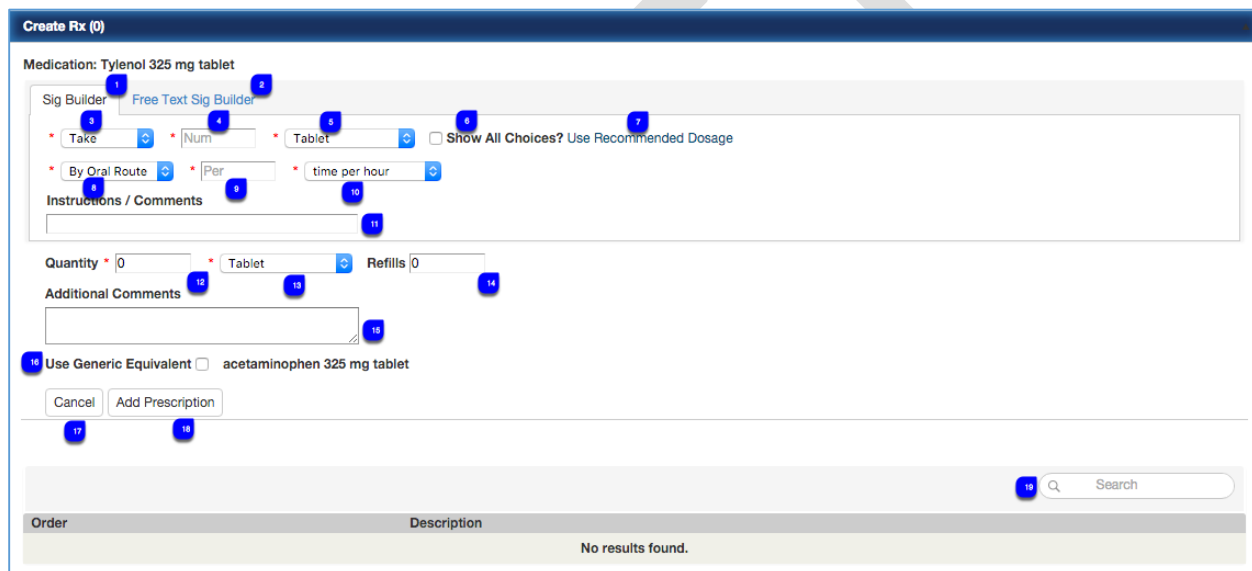


Create Rx (0)

Medication 1
Start typing to select a medication.

Medication Search Field: The medication search field is a search-as-you-type field allowing the user to select the medication for the prescription individual order.

Sig Builder



Create Rx (0)

Medication: Tylenol 325 mg tablet

Sig Builder 1 Free Text Sig Builder 2

* Take 3 * Num 4 * Tablet 5 ☐ Show All Choices? Use Recommended Dosage 7

* By Oral Route 8 * Per 9 * time per hour 10

Instructions / Comments 11

Quantity * 0 * Tablet 12 Refills 0 14

Additional Comments 13

16 Use Generic Equivalent ☐ acetaminophen 325 mg tablet

Cancel 17 Add Prescription 18

19 Search

Order	Description
No results found.	

1. **Sig Builder Tab:** If the user is on this tab, they will be able to enter a **Create Prescription** individual order via the standard Sig Builder.
2. **Free Text Sig Builder Tab:** If the user is on this tab, they will be able to enter a **Create Prescription** individual order, via the **Free Text Sig Builder**.
3. **Action Dropdown:** This dropdown list displays the relevant actions for the selected medication (i.e. take, apply, chew, etc.). If **Show All Choices** is checked, then all Actions within the system, whether or not they are related to the selected medication, will be displayed.
4. **Num Field:** This field contains the number of dosage types for the client to take.
5. **Dosage Dropdown:** This dropdown displays the relevant **Dosage** types for the selected medication (i.e. tablet, tablespoon, scoopful, etc.). If **Show All Choices** is checked, all Actions within the system, whether or not they are related to the selected medication, will be displayed.
6. **Show All Choices Flag:** If the user checks this box, all possible options will be displayed in the **Action, Dosage, Route, and Route Time** dropdowns. If this flag is not checked, only the options

relevant to the selected medication will be displayed in the **Action, Dosage, Route, and Route Time** dropdowns.

7. **Use Recommended Dosage Action Link:** This link will only be displayed if the selected medication has a recommended dosage associated with it. If the user clicks on the **Use Recommended Dosage** action link, the **Action, Num, Dosage, Route, Per Count, Route Time, and Instructions/Comments** fields will be populated with the recommended values.
8. **Route Dropdown:** This dropdown displays the relevant **Routes** for the selected medication (i.e. By Oral Route, In Each Ear, In Each Eye, etc.). If **Show All Choices** is checked, all Routes within the system, whether or not they are related to the selected medication, will be displayed.
9. **Per Field:** This field contains the number of times the dosage should be administered during the **Route Time**.
10. **Route Time:** This dropdown list displays the relevant **Route Times** for the selected medication, (i.e., times per hour, at bedtime, before every meal, etc.). If **Show All Choices** is checked, all **Route Times** within the system, whether or not they are related to the selected medication, will be displayed.
11. **Instructions/Comments Field:** This field allows the user to enter up to 70 characters to be appended to the end of the prescription. If there is a special instruction for the administration of the medication, it should be entered in this field.
12. **Quantity Field:** This field contains the number of dosages that are being prescribed.
13. **Quantity Unit Dropdown:** This dropdown displays the relevant **Quantity Unit** types for the selected medication, (i.e., tablet, wafer, vial, etc.). If **Show All Choices** is checked, all **Quantity Unit** types within the system, whether or not they are related to the selected medication, will be displayed.
14. **Refills Field:** This field contains the number of refills the prescriber is permitting.
15. **Additional Comments:** This field allows the user to enter up to 210 characters. This field should be used if the prescriber has specific instructions/comments for the pharmacist.
16. **Cancel Button:** If the user clicks this button, they will be returned to the **Medication Selection** prompt.
17. **Add Prescription:** If the user clicks this button after all required fields have been populated:
 - the **Create Prescription** individual order will be saved for the Standing Order Set;
 - it will be added to the **Create Prescription** individual order grid;
 - and the user will be returned to the **Medication Selection** prompt.

Standing Order Set: Meds Category Anatomy

The screenshot shows a web-based form titled "Meds (0)". It contains the following fields and controls:

- Medication ***: A search-as-you-type (SAYT) text input field.
- Dosage ***: A text input field.
- Frequency ***: A text input field.
- Rationale ***: A text input field.
- Package Qty ***: A text input field.
- Refill Count ***: A text input field.
- Route ***: A dropdown menu with "Select Route" as the placeholder.
- Is Prescription ***: A checkbox.
- Pharmacy ***: A text input field.
- Instructions ***: A text input field.
- Buttons**: "Cancel" and "Add Meds Order" buttons.
- Search**: A search bar with a magnifying glass icon.
- Footer**: "Order Detail" and "No results found." text.

1. **Medication Field:** This is where the user selects/enters the name of the medication. This field is a Search As You Type (SAYT) field, meaning that as the user starts to type in the name of a medication, a dropdown is displayed with suggestions that the user can choose from.
*Note that for a medication to be run through the Med/Med and Med/Allergy Interaction check, it must be selected from the dropdown
2. **Dosage Field:** This is the field where the user enters the dosage (i.e. 2 tablets)
3. **Frequency Field:** This is the field where the user enters how frequent the dosage is to be administered (i.e. Every morning)
4. **Rationale Field:** This is the field where the user enters the reason for the medication (i.e. Headaches)
5. **Package Qty Field:** This is the field where the user enters the number of tablets/pills/mgs/ etc for the medication
6. **Refill Count:** This field is where the user enters the number of refills the medication has. This field is most relevant for concurrent prescriptions
7. **Route Dropdown:** This dropdown allows the user to select the route for the medication (i.e. By Oral Route)
8. **Is Prescription Flag:** If the user sets this flag (checkbox) to true (Checks the checkbox) the Medication will be flagged as a Prescription
9. **Pharmacy Field:** This field is where the user can enter the name of the pharmacy the prescription was filled at. This field is only relevant if the Medication is a concurrent prescription that was filled at a pharmacy
10. **Instructions Field:** This is the field where the user enters the instructions for medication administration
11. **Cancel Button:** If the user clicks this button, all of the medication data entry fields are nulled out

12. **Add Meds Order Button:** If the user clicks this button, and all required fields are populated, then the Meds individual order will be saved off for the Standing Order Set, it will be added to the Meds individual order grid, and all of the medication data entry fields are nulled out.

DRAFT

Standing Order Set: Labs/Consult/Therapy/Psych/Radiology/Other Anatomy

The screenshot shows a web interface for a 'Standing Order Set: Labs/Consult/Therapy/Psych/Radiology/Other Anatomy'. The main section is titled 'Labs (0)' and contains a large text input field for entering order data. To the right of this field are two buttons: 'Cancel' and 'Add Labs Order'. Below the input field is a search bar with a magnifying glass icon and the word 'Search'. At the bottom of the interface, there is a section labeled 'Order' which currently displays the message 'No results found.'.

1. **Order Entry Field:** This is where the user enters the order data
2. **Cancel Button:** If the user clicks this button, the Order Entry field is nulled out
3. **Add {Order Type} Button:** If the user clicks this button, and the order entry field is populated, then the individual order will be saved off for the Standing Order Set, it will be added to the individual order grid, and the Order Entry field will be nulled out

Order Set Tab Anatomy

Order Set: Dysthymia - Adolescent

Order Date: 1/20/2016 9:01 AM

Add Order	Order	Category	Type	Date
Add Order	Chapstick 2 swipes Topically Apply to chapped lips as needed	Meds	Standing Order	1/20/2016 9:01 AM
Add Order	Depakote 125 mg tablet, delayed release	Create Rx	Standing Order	1/20/2016 9:01 AM
Add Order	PAYA Group X1 Weekly	Other	Standing Order	1/20/2016 9:01 AM
Add Order	Individual Therapy X1 Weekly	Therapy	Standing Order	1/20/2016 9:01 AM
Add Order	Group Therapy X1 Weekly	Therapy	Standing Order	1/20/2016 9:01 AM
Add Order	Family Therapy X1 Weekly	Therapy	Standing Order	1/20/2016 9:01 AM

1. **Order Set Dropdown:** This dropdown lists out all of the activated Standing Order Sets, that the selected Provider is assigned to. When a Standing Order is selected, the individual orders associated with it, are displayed in the Individual Orders grid.

2. **Order Set Global Date/Time Picker:** This date/time picker defaults to the date/time stamp that the Orders page was navigated to. If the user updates this date/time stamp, the updated date/time will cascade to all individual orders that have not had their individual date/time stamps manually updated.

3. **Individual Orders Grid:** This grid displays all individual orders that are associated with the selected Standing Order Set.

4. **Add Order Column:** This column houses the Add Order button.

5. **Order Column:** This column displays the actual order

6. **Category Column:** This column displays the individual order's category (i.e. Meds, Therapy, Other, etc)

7. **Type Column:** This column displays the individual order's type. For Standing Order Sets, the order type will always be Standing Order

8. **Date Column:** This column displays the date/time stamp for when the order takes effect

9. **Add Order Button:** If the user clicks this button, the user will be navigated through the workflow to add the individual order.

*Note: For Add Medication and Create Prescription individual orders, the Add Order button will only be enabled if the user's Profile Code has Security Matrix Rights: RxUpdate and PrescriptionCreate, respectively.

10. **Individual Order Date:** If the user clicks on the individual order's date/time stamp, the field becomes editable, and the user can specify an effective date for the individual order. This functionality should be used when an individual order's effective date needs to be different from the Order Date specified in the Order Set Global Date/Time Picker.

Add Individual Order

Add Text Entry Individual Order

Add Text Entry Individual Order	
Use	Add a non-medication individual order
Required Security Matrix Rights	PhysicianOrdersView; PhysicianOrdersAdd
Partner Configs	Use Standing Order Sets

Steps to Complete Workflow

1. Filter on the desired prescriber
2. Click on the 'Order Set' tab
3. Click the [Add Order] button, for the desired individual order

Meds
Labs
Consult
Therapy
Psych
Radiology
Other
Order Set

Order Set: Adolescent Bi-Polar
Order Date: 2/2/2016 10:17 AM

Individual Orders

	Order	Category	Type	Date
Add Order	Tylenol 325 mg tablet	Create Rx	Standing Order	2/2/2016 10:17 AM
Add Order	Depakote ER 250 mg tablet,extended release	Create Rx	Standing Order	2/2/2016 10:17 AM
Add Order	Benadryl 25 mg capsule	Create Rx	Standing Order	2/2/2016 10:17 AM
Add Order	Adderall 10 mg tablet 1 tablet Every morning By Oral Route Take with breakfast	Meds	Standing Order	2/2/2016 10:17 AM
Add Order	Chapstick 2 swipes as needed To Affected Area Apply 2 swipes per lip as needed	Meds	Standing Order	2/2/2016 10:17 AM
Add Order	Adderall 10 mg tablet 1 tablet Every morning By Oral Route Take with breakfast	Meds	Standing Order	2/2/2016 10:17 AM
Add Order	Individual Tx X1 weekly	Therapy	Standing Order	2/2/2016 10:17 AM
Add Order	Family Tx X1 Weekly	Therapy	Standing Order	2/2/2016 10:17 AM
Add Order	Group Therapy X1 Weekly	Therapy	Standing Order	2/2/2016 10:17 AM
Add Order	PAYA Group X1 Weekly	Other	Standing Order	2/2/2016 10:17 AM

4. The individual order is added to the 'Current Unsigned' orders category

Current Orders:

Provider: Wilson, Dr Sacha

Type: Phone

Sign

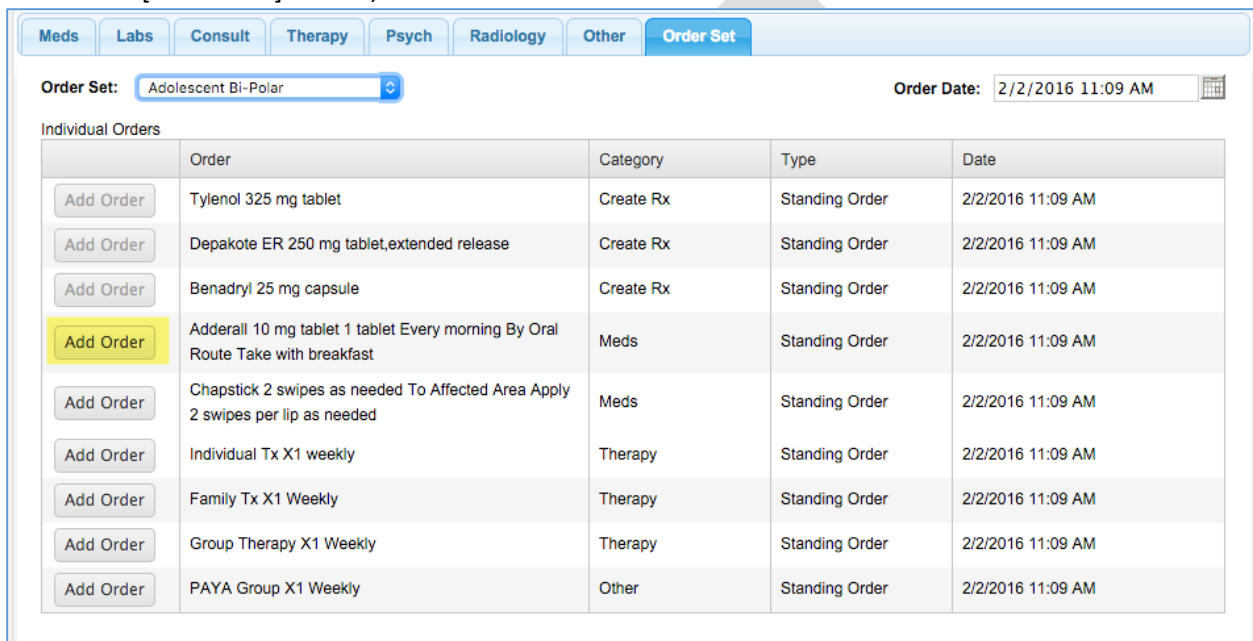
<input type="checkbox"/> Sign	Order Date	Date Updated	Category	Provider	Type	Order	Entered By	Notes				
<input type="checkbox"/>	2/2/2016	2/2/2016	Labs	KB Admin	Phone	wer	J Kissel	<input type="checkbox"/>	edit	notes		
<input type="checkbox"/>	1/12/2016	1/12/2016	Medications	Test Prescriber1		Valium 10 mg tablet Take 1 tablet (10 MG) By Oral Route 3 times per day Instructions Quantity:3 Refills:44	J Kissel	<input type="checkbox"/>		notes		
<input type="checkbox"/>	1/20/2016	1/20/2016	Medications	Test Prescriber1		Tylenol 325 mg tablet Take 1 tablet (325 MG) By Oral Route 1 time per hour as needed Quantity:3 Refills:3	J Kissel	<input type="checkbox"/>		notes		
<input type="checkbox"/>	1/21/2016	1/21/2016	Medications	Test Prescriber1		Depakote 125 mg tablet,delayed release Take 1 Tablet By Oral Route Per daily Take at breakfast and dinner Quantity:30 Refills:3	J Kissel	<input type="checkbox"/>		notes		
<input type="checkbox"/>	1/11/2016	1/11/2016	Other	KB Admin	Std Order	Report CDC	J Kissel	<input type="checkbox"/>	edit	notes		
<input type="checkbox"/>	1/12/2016	1/12/2016	Other	Rick Beck	Std Order	Verify patient is conscious	J Kissel	<input type="checkbox"/>	edit	notes		
<input type="checkbox"/>	1/20/2016	1/20/2016	Other	David Rosswog	Std Order	PAYA Group X1 Weekly	J Kissel	<input type="checkbox"/>	edit	notes		
<input type="checkbox"/>	1/21/2016	1/21/2016	Therapy	David Rosswog	Std Order	Individual Therapy X1 Weekly	J Kissel	<input type="checkbox"/>	edit	notes		
<input type="checkbox"/>	1/21/2016	1/21/2016	Therapy	Provider A Test	Std Order	Group Therapy X1 Weekly	J Kissel	<input type="checkbox"/>	edit	notes		
<input type="checkbox"/>	1/21/2016	1/21/2016	Therapy	Provider A Test	Std Order	Individual Therapy X1 Weekly	J Kissel	<input type="checkbox"/>	edit	notes		
<input type="checkbox"/>	2/2/2016	2/2/2016	Therapy	Dr Sacha Wilson	Std Order	Individual Tx X1 weekly	J Kissel	<input type="checkbox"/>	edit	notes		

Add Medication Individual Order

Add Medication Individual Order	
Use	Add a non-medication individual order
Required Security Matrix Rights	PhysicianOrdersView; PhysicianOrdersAdd; RxUpdate
Partner Configs	Use Standing Order Sets

Steps to Complete Workflow

1. Filter on the desired prescriber
2. Click on the 'Order Set' tab
3. Click the [Add Order] button, for the desired individual order



The screenshot shows the 'Add Medication Individual Order' interface. At the top, there are tabs for 'Meds', 'Labs', 'Consult', 'Therapy', 'Psych', 'Radiology', 'Other', and 'Order Set'. The 'Order Set' tab is selected. Below the tabs, there is a dropdown menu for 'Order Set:' with 'Adolescent Bi-Polar' selected. To the right, there is a date field for 'Order Date:' with '2/2/2016 11:09 AM' and a calendar icon. Below this, there is a table titled 'Individual Orders' with columns: 'Order', 'Category', 'Type', and 'Date'. The table lists several orders, each with an 'Add Order' button to its left. The 'Add Order' button for the order 'Adderall 10 mg tablet 1 tablet Every morning By Oral Route Take with breakfast' is highlighted in yellow.

	Order	Category	Type	Date
Add Order	Tylenol 325 mg tablet	Create Rx	Standing Order	2/2/2016 11:09 AM
Add Order	Depakote ER 250 mg tablet, extended release	Create Rx	Standing Order	2/2/2016 11:09 AM
Add Order	Benadryl 25 mg capsule	Create Rx	Standing Order	2/2/2016 11:09 AM
Add Order	Adderall 10 mg tablet 1 tablet Every morning By Oral Route Take with breakfast	Meds	Standing Order	2/2/2016 11:09 AM
Add Order	Chapstick 2 swipes as needed To Affected Area Apply 2 swipes per lip as needed	Meds	Standing Order	2/2/2016 11:09 AM
Add Order	Individual Tx X1 weekly	Therapy	Standing Order	2/2/2016 11:09 AM
Add Order	Family Tx X1 Weekly	Therapy	Standing Order	2/2/2016 11:09 AM
Add Order	Group Therapy X1 Weekly	Therapy	Standing Order	2/2/2016 11:09 AM
Add Order	PAYA Group X1 Weekly	Other	Standing Order	2/2/2016 11:09 AM

4. Click the [Create Medication] button

CLIENT MEDICATIONS: Maya Matthews (2551) DOB: 01/01/2000 (16 / F)

Medication: Adderall 10 mg tablet

Dosage: 1 tablet

Frequency: Every morning

Rationale: Take with breakfast

Quantity: 30

Refills: 1

Route: In Each Eye

Provider: Dr Sacha Wilson Add Provider

Is Prescription: No

Pharmacy:

Instructions: Take with breakfast

Medication Was: Started

On Date: 2/2/2016

Create Medication Cancel

***Please note that Med/Med and Med/Allergy interaction checks will only occur against medications / allergies that were selected from a dropdown.**

5. The Meds record is created, and the individual order is present in the 'Current Unsigned' orders category

Current Orders: Provider: Wilson, Dr Sacha Type: Phone Sign										
Sign	Order Date	Date Updated	Category	Provider	Type	Order	Entered By	Notes		
<input type="checkbox"/>	2/2/2016	2/2/2016	Labs	KB Admin	Phone	wer	J Kissel	<input type="checkbox"/>	edit	notes
<input type="checkbox"/>	2/2/2016	2/2/2016	Medications	Dr Sacha Wilson	Std Order	Adderall 10 mg tablet 1 tablet Every morning By Oral Route Take with breakfast	J Kissel	<input type="checkbox"/>	edit	notes
<input type="checkbox"/>	2/2/2016	2/2/2016	Medications	Dr Sacha Wilson	Std Order	Adderall 10 mg tablet 1 tablet Every morning By Oral Route Take with breakfast	J Kissel	<input type="checkbox"/>	edit	notes
<input type="checkbox"/>	1/12/2016	1/12/2016	Medications	Test Prescriber1		Valium 10 mg tablet Take 1 tablet (10 MG) By Oral Route 3 times per day Instructions Quantity:3 Refills:44	J Kissel	<input type="checkbox"/>		notes
<input type="checkbox"/>	1/20/2016	1/20/2016	Medications	Test Prescriber1		Tylenol 325 mg tablet Take 1 tablet (325 MG) By Oral Route 1 time per hour as needed Quantity:3 Refills:3	J Kissel	<input type="checkbox"/>		notes
<input type="checkbox"/>	1/21/2016	1/21/2016	Medications	Test Prescriber1		Depakote 125 mg tablet, delayed release Take 1 Tablet By Oral Route Per daily Take at breakfast and dinner Quantity:30 Refills:3	J Kissel	<input type="checkbox"/>		notes
<input type="checkbox"/>	1/11/2016	1/11/2016	Other	KB Admin	Std Order	Report CDC	J Kissel	<input type="checkbox"/>	edit	notes
<input type="checkbox"/>	1/12/2016	1/12/2016	Other	Rick Beck	Std Order	Verify patient is conscious	J Kissel	<input type="checkbox"/>	edit	notes
<input type="checkbox"/>	1/20/2016	1/20/2016	Other	David Rosswog	Std Order	PAYA Group X1 Weekly	J Kissel	<input type="checkbox"/>	edit	notes
<input type="checkbox"/>	1/21/2016	1/21/2016	Therapy	David Rosswog	Std Order	Individual Therapy X1 Weekly	J Kissel	<input type="checkbox"/>	edit	notes
<input type="checkbox"/>	1/21/2016	1/21/2016	Therapy	Provider A Test	Std Order	Group Therapy X1 Weekly	J Kissel	<input type="checkbox"/>	edit	notes
<input type="checkbox"/>	1/21/2016	1/21/2016	Therapy	Provider A Test	Std Order	Individual Therapy X1 Weekly	J Kissel	<input type="checkbox"/>	edit	notes
<input type="checkbox"/>	2/2/2016	2/2/2016	Therapy	Dr Sacha Wilson	Std Order	Individual Tx X1 weekly	J Kissel	<input type="checkbox"/>	edit	notes

Add Create Prescription Individual Order

Add Create Prescription Individual Order	
Use	Add a non-medication individual order
Required Security Matrix Rights	PhysicianOrdersView; PhysicianOrdersAdd; PrescriptionCreate (or Credible Rx Providers Record)
Partner Configs	Use Standing Order Sets; Credible Rx

Steps to Complete Workflow

1. Filter on the desired prescriber

NOTE: If the selected provider does not have a Credible Rx Providers record, Create Prescription Individual Orders will not be able to be added

2. Click on the 'Order Set' tab

3. Click the [Add Order] button, for the desired individual order

Meds Labs Consult Therapy Psych Radiology Other **Order Set**

Order Set:
Order Date:

Individual Orders

	Order	Category	Type	Date
Add Order	Tylenol 325 mg tablet	Create Rx	Standing Order	2/2/2016 11:14 AM
Add Order	Adult Multivitamin Gummies 200 mcg chewable tablet 1 By Oral Route Take as daily with food. med from sos admin	Meds	Standing Order	2/2/2016 11:14 AM
Add Order	Adult Multivitamin Gummies 200 mcg chewable tablet 1 By Oral Route Take as daily with food. med from sos admin	Meds	Standing Order	2/2/2016 11:14 AM
Add Order	test med order from SOS 1 as needed Topical med test from sos	Meds	Standing Order	2/2/2016 11:14 AM
Add Order	lab from sacha's standing order	Labs	Standing Order	2/2/2016 11:14 AM
Add Order	another lab from sacha's standing order set	Labs	Standing Order	2/2/2016 11:14 AM
Add Order	talk to someone from sacha's standing order set	Therapy	Standing Order	2/2/2016 11:14 AM
Add Order	some therapy from sacha's standing order set	Therapy	Standing Order	2/2/2016 11:14 AM
Add Order	get a consult from sacha's order set	Consult	Standing Order	2/2/2016 11:14 AM
Add Order	an other order from sacha's standing order set	Other	Standing Order	2/2/2016 11:14 AM

4. The user is now on the RxSigBuilder page, with all of the required fields pre-populated based off of the individual order's data

Prescription for: **Maya Matthews (2551)** DOB: 01/01/2000 (16 / F)

Medication: Tylenol 325 mg tablet
☐ Save this medication in your favorites list?

Drug Class: Non-Narcotic Analgesic/Antipyretic, Non-Salicylate Use Alternative: ⌵

Provider: Beck, Rick Start Date: 2/2/2016 📅

Predefined Dosages:
 Recommended Dosage:
 take 1 tablet (325 MG) by oral route 1 time per hour

*Please note that Med/Med and Med/Allergy interaction checks will only occur against medications / allergies that were selected from a dropdown.

Prescription Monograph Contraindications

Sig Builder Free Text Sig:

Free Text Sig:
 take 1 tablet (325 MG) by oral route 1 time per hour as needed ABC

When switching between the Sig Builder tab and the Free Text Sig tab, please note that the system will always take your input from the ACTIVE tab when you move to the next screen. Please also note that data is not shared between the Sig Builder and Free Text Sig.

Tylenol 325 mg tablet is an Unknown Formulary Status Brand Over the Counter Drug

No Plan Available

Quantity: 2 Tablet Refills: 0 ☐ PRN

☐ Save prescription as template?

Additional Comments:
 free text sig builder med from SOS admin

Use Generic Equivalent:
☐ acetaminophen 325 mg tablet

Print Prescription Send To Pharmacy Cancel

5. Click either the [Print Prescription] or [Send to Pharmacy] button

6. The user is navigated to the RxFinalize page

Prescription for: **Maya Matthews (2551)** DOB: 01/01/2000 (16 / F)

Gender: F
 Date of Birth: 1/1/2000

Provider: Beck, Rick
 Provider Phone:
 Provider Address:

Prescribed Medication Info:
 Written Date: 2/2/2016 11:38:24 AM
 Medication: Tylenol 325 mg tablet
 Dosage: take 1 tablet (325 MG) by oral route 1 time per hour as needed ABC Edit
 Quantity: 2 Tablet
 Refills: 0
 Addtl. Comments: ***Notes to the Pharmacy.** free text sig builder med from SOS admin
 Geo Area: 📍 -- Geo Area -- ⌵

Pharmacy Phone:
 Pharmacy Address:
 Orders Note:
 Skip Pending: ☐

☒ Substitutions allowed
☐ Dispense as written (substitutions not allowed)

Print Submit For Approval Back

7. In the screenshot above, the user clicked on [Print Prescription] in step 5. Update and desired fields, and click the [Print] button

8. The user is brought to the RxPrintout page

RxPDFWriter.aspx 1 / 1

CREDIBLE

inpatient
934 S. Main St. Layton, UT 84041

Rick Beck (Agent: Jay Kissel)

Patient Information:
Maya Matthews DOB: 1/1/2000 Gender: F

Tylenol 325 mg tablet
take 1 tablet (325 MG) by oral route 1 time per hour as needed ABC
free text sig builder med from SOS admin

NDC# 00450049660

[Return to Orders](#)

9. Click the [Return to Orders] button to return to the Physician Orders Page

10. The prescription (Meds) record is created

11. The Individual Order is in the 'Current Unsigned Orders' category

<input type="checkbox"/> Sign	Order Date	Date Updated	Category	Provider	Type	Order	Entered By	Notes			
<input type="checkbox"/>	1/12/2016	1/12/2016	Medications	Test Prescriber1		Valium 10 mg tablet Take 1 tablet (10 MG) By Oral Route 3 times per day Instrucrions Quantity:3 Refills:44	J Kissel	<input type="checkbox"/>	notes		
<input type="checkbox"/>	1/20/2016	1/20/2016	Medications	Test Prescriber1		Tylenol 325 mg tablet Take 1 tablet (325 MG) By Oral Route 1 time per hour as needed Quantity:3 Refills:3	J Kissel	<input type="checkbox"/>	notes		
<input type="checkbox"/>	1/21/2016	1/21/2016	Medications	Test Prescriber1		Depakote 125 mg tablet,delayed release Take 1 Tablet By Oral Route Per daily Take at breakfast and dinner Quantity:30 Refills:3	J Kissel	<input type="checkbox"/>	notes		
<input checked="" type="checkbox"/>	2/2/2016	2/2/2016	Medications	Rick Beck		Tylenol 325 mg tablet take 1 tablet (325 MG) by oral route 1 time per hour as needed ABC Quantity:2 Refills:0	J Kissel	<input type="checkbox"/>	notes		
<input type="checkbox"/>	2/2/2016	2/2/2016	Medications	Rick Beck		Tylenol 325 mg tablet Take 1 Tablet By Oral Route Per hourly as needed Quantity:30 Refills:5	J Kissel	<input type="checkbox"/>	notes		

Log Actions

Log	Action	Meaning
Employee /Global HIPAA Log	ASSIGN EMPLOYEE STANDING ORDER SET	Employee was assigned to a Standing Order Set
Employee/Global HIPAA Log	UNASSIGN EMPLOYEE STANDING ORDER SET	Employee was unassigned from a Standing Order Set