Standing Order Sets Manual

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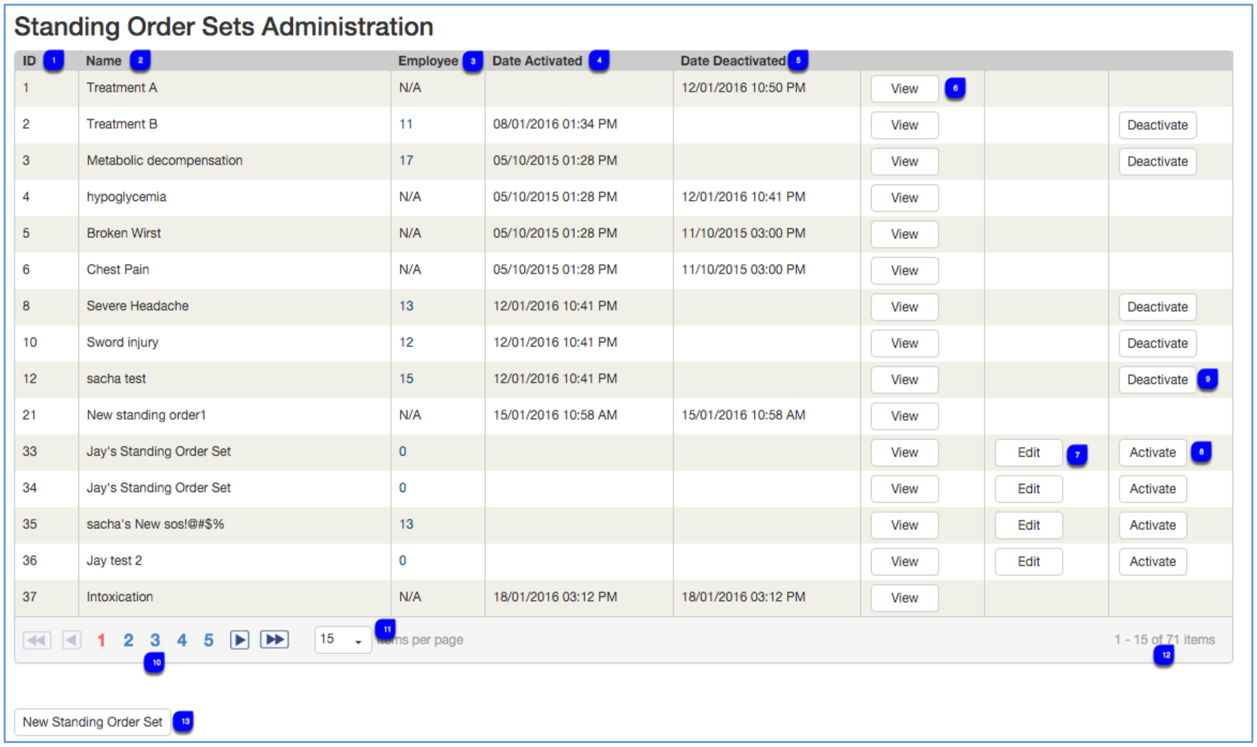
Standing Order Sets Administration



Standing Order Sets Administration

ID	Name	Employee	Date Activated	Date Deactivated			
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 Wirst	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		

1 2 3 4 5 — 15 items per page — 1 - 15 of 71 items

New Standing Order Set

1. **ID:** This column displays the ID of the Standing Order Set.
2. **Name**: 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.
3. **Assigned Employees:** 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 set ordered on their behalf, they must be assigned to that set. Clicking on the number displayed in this column brings you to the *Assignment/Unassignment* screen for the specific set.
4. **Date Activated:** This column displays the date/time stamp on which the set was activated.
5. **Date Deactivated:** This column displays the date/time stamp on which the set was deactivated.
6. **View** button**:** This button is displayed on all Standing Order Sets where the user's Profile Code has *Security Matrix: SOSView* checked. When you click this button, the *Standing Order Sets View* workflow is started.
7. **Edit** button: This button initiates the *Standing Order Sets Edit/Update* workflow. It is displayed if two conditions are true:
    - the Standing Order Set is in *Draft* status AND
    - your Profile Code has *Security Matrix: SOSUpdate* checked.
8. **Activate** button**:** This button will be displayed if two conditions are true:
    - the Standing Order Set is in *Draft* status, AND
    - your Profile Code has *Security Matrix: SOSActivate* checked.

   When you click this button, the Standing Order Set will be activated. Standing Order Sets can only be ordered if:

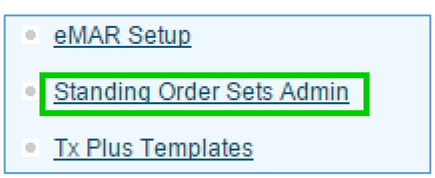
   - the selected provider has been assigned to the Standing Order Set, AND
   - the Standing Order Set is in *Active* status.
9. **Deactivate** button**:** When this button is clicked, the Standing Order Sets status will be updated to *Deactivated*, and will no longer be able to be ordered. This button is displayed if two conditions are true:
   - the Standing Order Set is in *Active* status, AND
   - your Profile Code has *Security Matrix: SOSDeactivate* checked.
10. **Pagination Links:** When you click 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 you are seeing the first 15 sets out of a total of 71 sets in the system.
13. **New Standing Order Set** button**:** This button is displayed when your Profile Code has *Security Matrix: SOSUpdate* checked. When you click this button, you initiate the **New Standing Order Set** workflow.

Assign/Unassign Employee Workflow

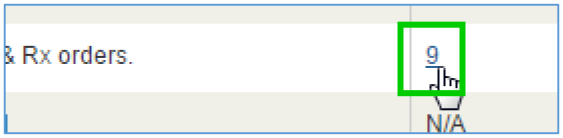
Assign/Unassign Employee	
Use	Assign employees to Standing Order Sets. An employee must be assigned to a before they can order it, or it can be ordered on their behalf.
Required Security Matrix Rights	SOSAssignEmployee
Partner Configs	Use Standing Order Sets

Steps to Complete Workflow

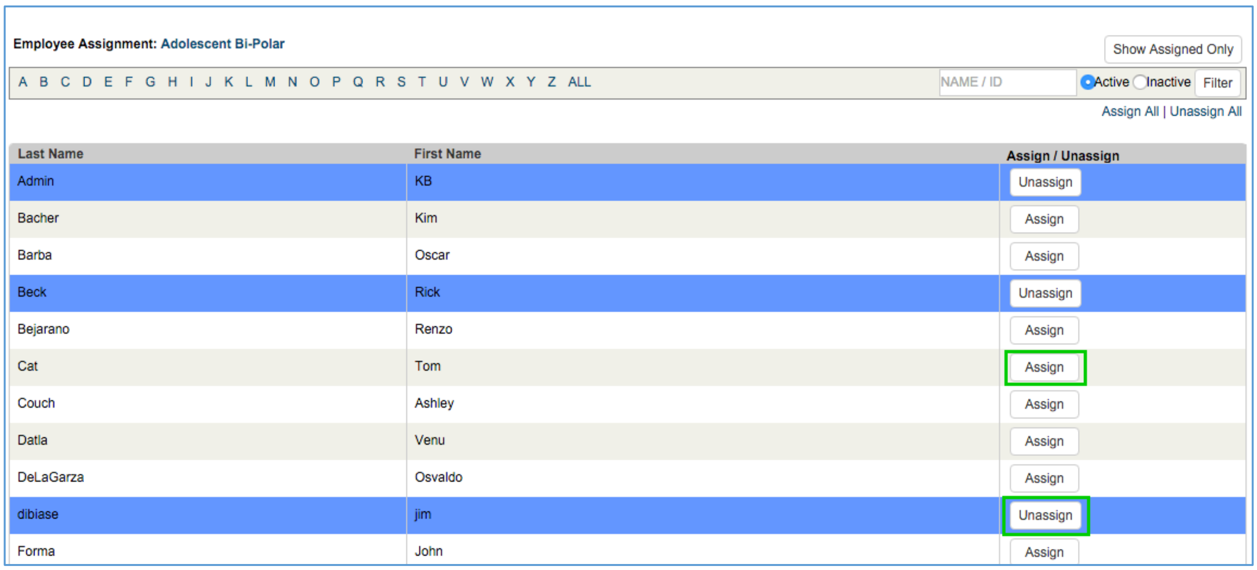
1. Navigate to **Admin** tab > **Daily Activities** > **Standing Order Sets Admin**.



2. Click the numeric link in the **Employee** column.



3. The **Employee Assignment** screen appears.



- 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 sets.
Required Security Matrix Rights	SOSView
Partner Configs	Use Standing Order Sets

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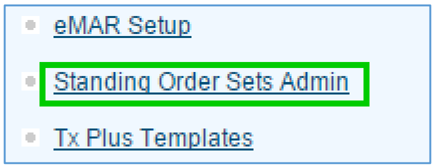
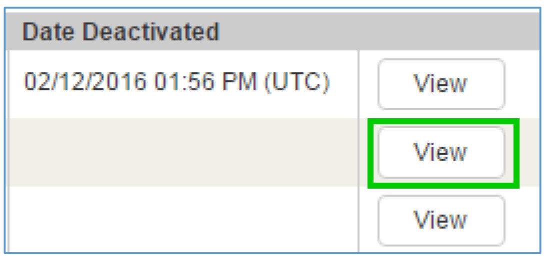
Steps to Complete Workflow

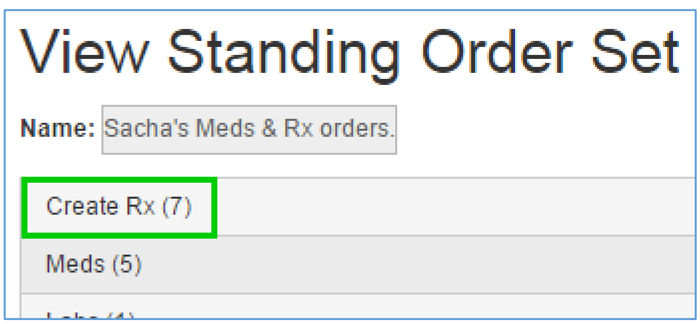
1. Navigate to **Admin** tab > **Daily Activities** > **Standing Order Sets Admin**.



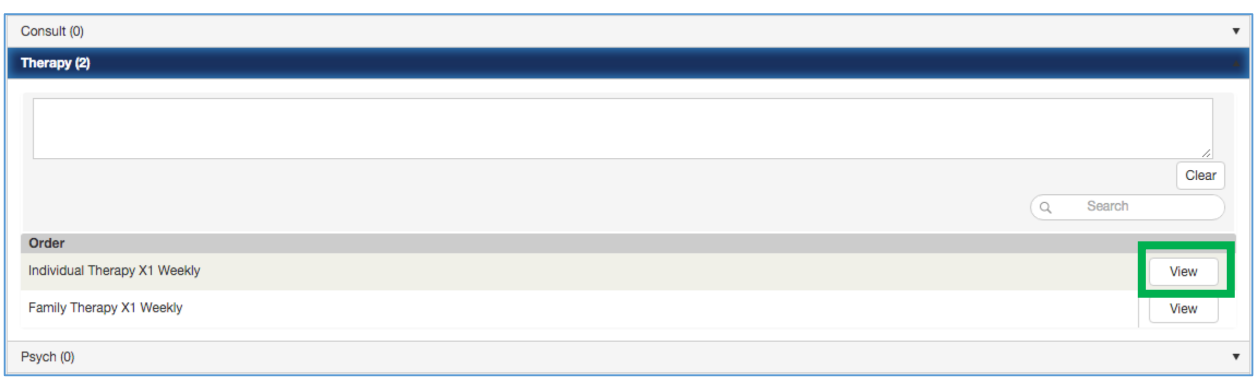
2. Click the **View** button for the Standing Order Set.



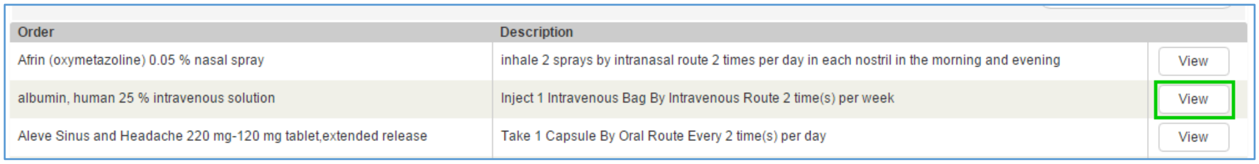
3. Click on the specific **Category** you want to view (Create Rx, Meds, Labs, etc.).



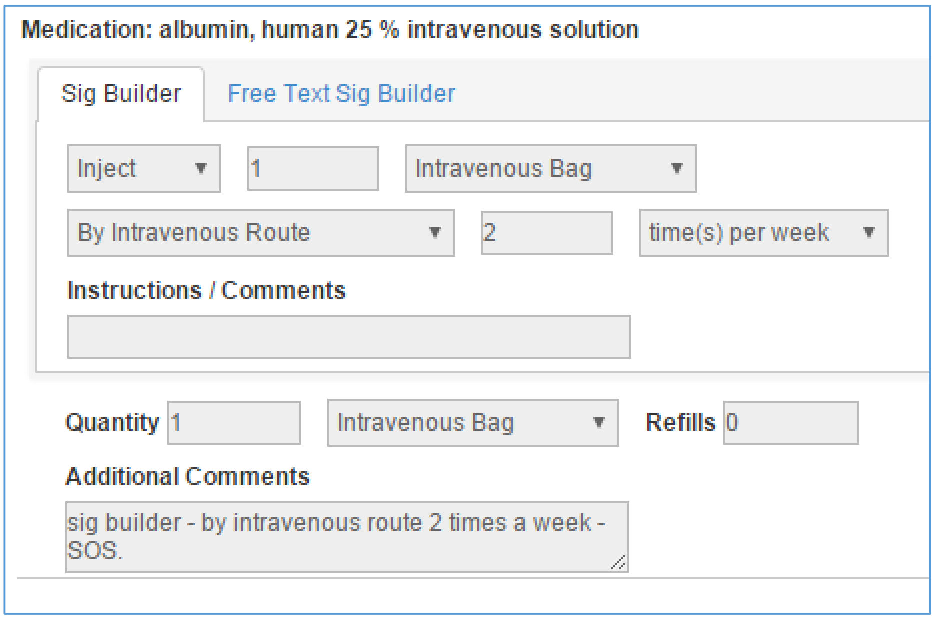
4. The category will expand, displaying the Individual Order grid, as well as the display area.



5. Click the **View** button on the desired individual order.



6. The order will be displayed in the display area.



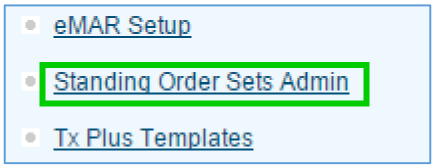
7. If you would like to view a different **Individual Order** that is part of the same category, either:
    a. click the **Clear** button, then the **View** button of the desired individual order, or
    b. click the **View** button of the desired Individual Order.

Edit Standing Order Set

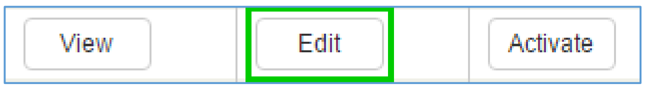
View Standing Order Set	
Use	Edit/Update existing standing order sets. Only Standing Order Sets in Draft status can be edited/updated.
Required Security Matrix Rights	SOSUpdate
Partner Configs	Use Standing Order Sets

Steps to Complete Workflow

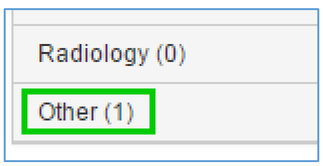
1. Navigate to **Admin** tab > **Daily Activities** > **Standing Order Sets Admin.**



2. Click the **Edit** button for the Standing Order Set.

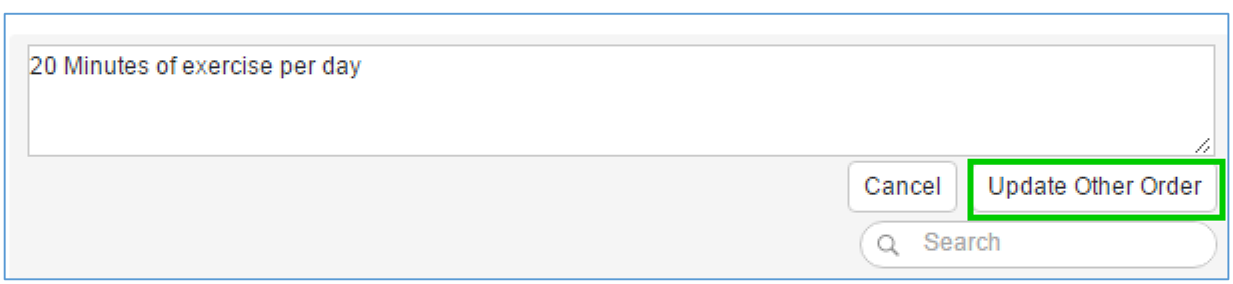


3. Click the **Category** for the individual order that you want to edit.



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

5. The data from the Individual Order is now displayed in the Order Entry text field above.



6. Modify the Individual Order as required, then click the **Update XX Order** button, where **XX** is the Category type selected.

7. The Individual Order is now updated in the system.

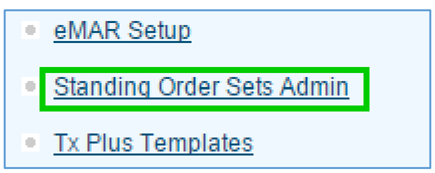
Please note: If you edit a **Create Prescription** or **Add Medication** individual order, all fields are editable, and the data is populated into the appropriate fields.

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 ordered on behalf of providers.
Required Security Matrix Rights	SOSActivate
Partner Configs	Use Standing Order Sets

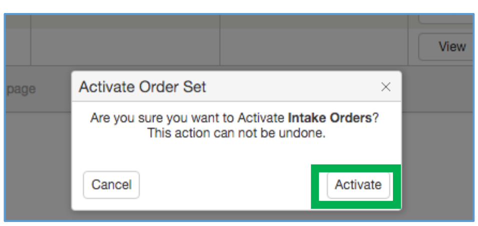
Steps to Complete Workflow

1. Navigate to **Admin** tab > **Daily Activities** > **Standing Order Sets Admin.**



2. Click the **Activate** button for the Standing Order Set you want to make available.

3. A popup confirmation will be displayed.



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

6. The activation date of the Standing Order Set is displayed in the **Date Activated** field, and the Activate button turns to **Deactivate**.

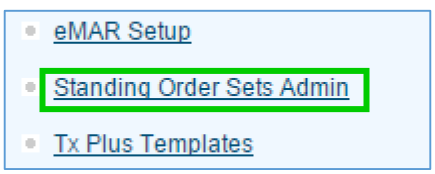
Please note: All logged date/time stamps (including HIPAA Log, Admin Log, and Activation/Deactivation Date) are currently displayed as UTC date/time stamps.

Deactivate Standing Order Set

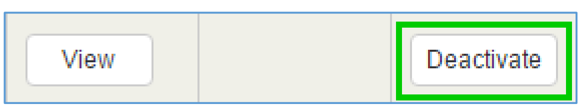
Deactivate Standing Order Set	
Use	Deactivate a Standing Order Set. Standing Order Sets should be deactivated when an agency sunsets the Standing Order Set, i.e., no longer wants providers to order it.
Required Security Matrix Rights	SOSDeactivate
Partner Configs	Use Standing Order Sets

Steps to Complete Workflow

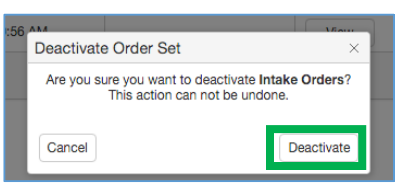
1. Navigate to **Admin** tab > **Standing Order Sets Admin**.



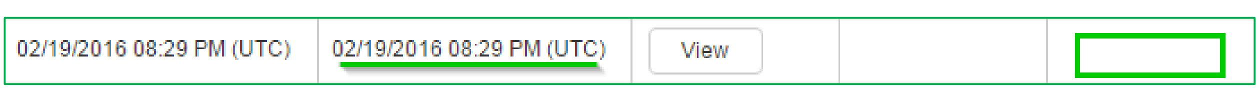
2. Click the **Deactivate** button to deactivate the appropriate Standing Order Set.



3. A popup confirmation is displayed.



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

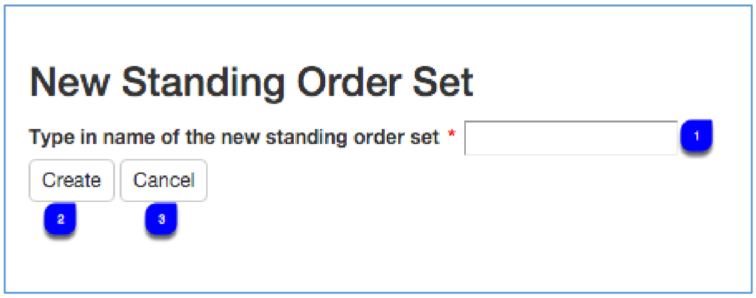


6. The deactivation date of the Standing Order Set is displayed in the **Date Deactivated** field.
7. The **Employee Count/Assignment/Unassignment** link is no longer displayed, and is replaced with an **N/A** label. This action occurs because the employee count is no longer relevant, and no additional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

Please note: All logged date/time stamps (including HIPAA Log, Admin Log, and Activation/Deactivation date) are currently displayed as UTC date/time stamps.

Standing Order Set Page

Name Page



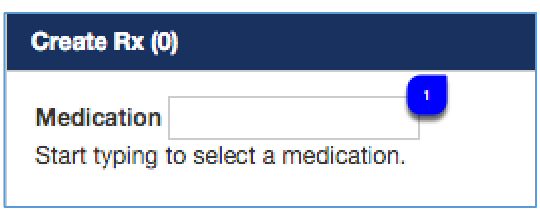
1. **Standing Order Set Name:** Enter the name of the Standing Order Set in this field. A name must be provided before it can be created.
2. **Create** button**:** If the Standing Order Set name field is populated, clicking this button will move you to the next step in the *New Standing Order Set* workflow.
3. **Cancel** button**:** Clicking this button will return you to the *Standing Order Sets Admin* screen.

Update Standing Order Set Page

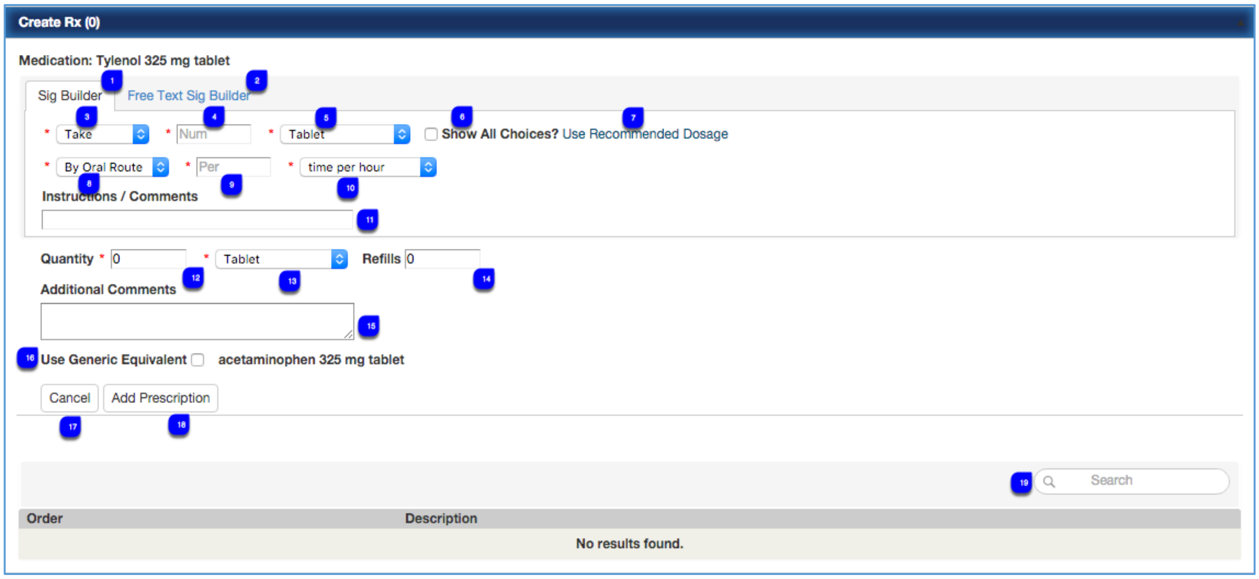
1. **Name:** Use this field to update the Standing Order Set's name.
2. **Save Order Set** button**:** When this button is clicked, the name of the Standing Order Set will be updated to the value currently displayed in in the **Name** field.

3. **Create Rx**: When you click this space, the area expands 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. **Meds:** When this space is clicked, the accordion control will expand to display the **Add Med** Individual Order category. 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:** When clicked, this area expands to display the **Labs** Individual Order category. 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:** On clicking, the 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:** When you click on this option, the space expands to display the **Therapy** Individual Order category. 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:** If you click on this, the **Psych** Individual Order category will be displayed. 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:** When you click on this option, the screen changes to display the **Radiology** Individual Order category. 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:** If you click on this 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**:** Clicking this button will you return to the **Standing Order Sets Admin** page.

Create Rx Category



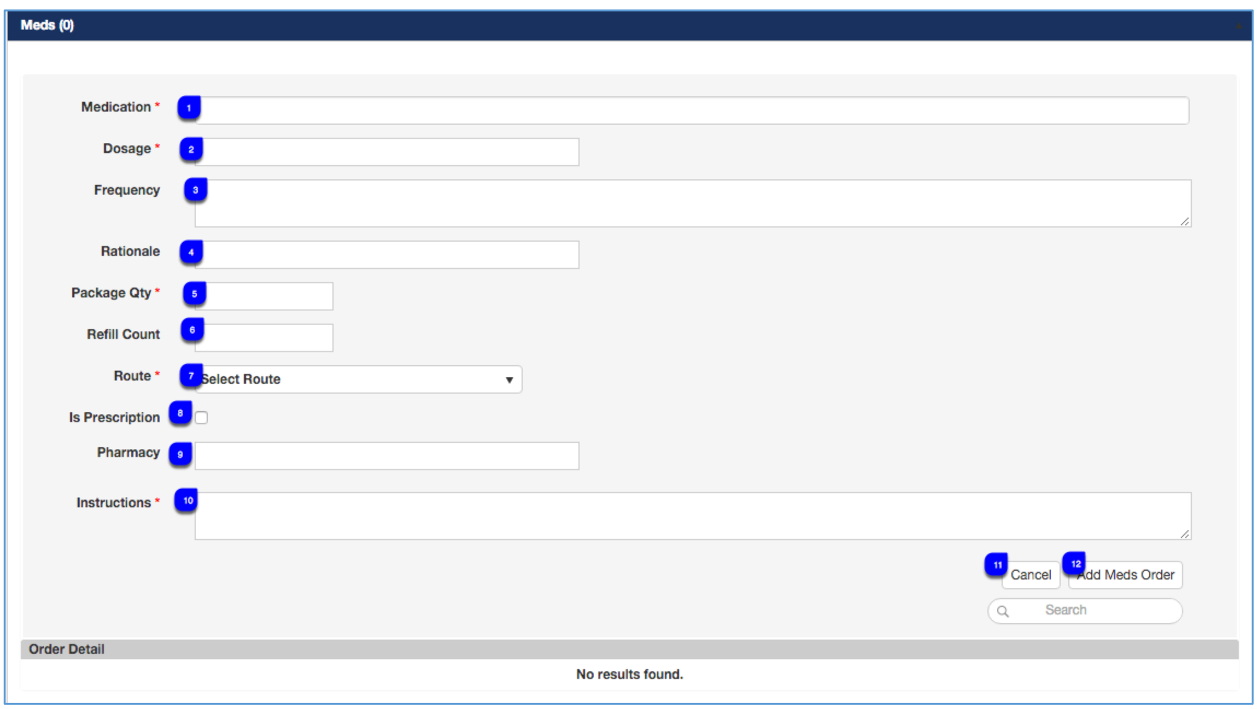
1. **Medication Search Field:** The medication search field is a search-as-you-type (SOYT) field allowing the user to select the medication for the prescription individual order.



1. **Sig Builder** tab**:** On this tab you are able to enter a **Create Prescription** Individual Order via the standard Sig Builder.
2. **Free Text Sig Builder** tab**:** On this tab you are able to enter a **Create Prescription** Individual Order via the **Free Text Sig Builder**.
3. **Action:** This dropdown list displays the relevant actions for the selected medication (e.g., 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:** This field contains the number of dosage types for the client to take.
5. **Dosage:** This dropdown displays the relevant **Dosage** types for the selected medication (e.g., 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 Choice** checkbox**:** If checked, all possible options will be displayed in the **Action**, **Dosage**, **Route**, and **Route Time** dropdowns. If left unchecked, only the options relevant to the selected medication will be displayed in the **Action**, **Dosage**, **Route**, and **Route Time** dropdowns.
7. **Use Recommended Dosage:** This action link will only be displayed if the selected medication has a recommended dosage associated with it. If you click 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:** This dropdown displays the relevant **Routes** for the selected medication (e.g., 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:** 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, (e.g., 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.

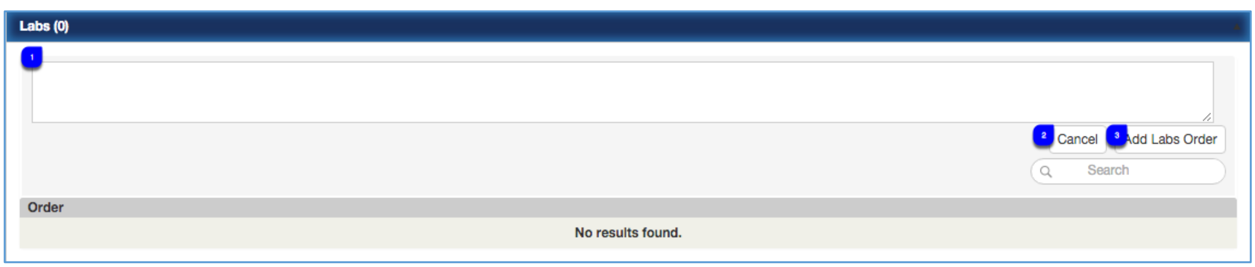
11. **Instructions/Comments:** This field allows you to enter up to 70 characters to be appended to the end of the prescription. If there is a special instruction for the administration of the medication, it should be entered in this field.
12. **Quantity:** This field contains the number of dosages that are being prescribed.
13. **Quantity Unit:** This dropdown displays the relevant **Quantity Unit** types for the selected medication, (e.g., 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:** This field contains the number of refills the prescriber is permitting.
15. **Additional Comments:** This field allows you to enter up to 210 characters for specific instructions or comments for the pharmacist.
16. **Use Generic Equivalent**: Checking this box recommends the use of a generic for the medication.
17. **Cancel** button**:** If clicked, this button will return you to the **Medication Selection** prompt.
18. **Add Prescription:** If all required fields have been populated, on clicking this button:
    - 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
    - you will be returned to the **Medication Selection** prompt.
19. **Search**: This search-as-you-type (SOYT) field looks for Individual Orders which contain the text entered.

Meds Category



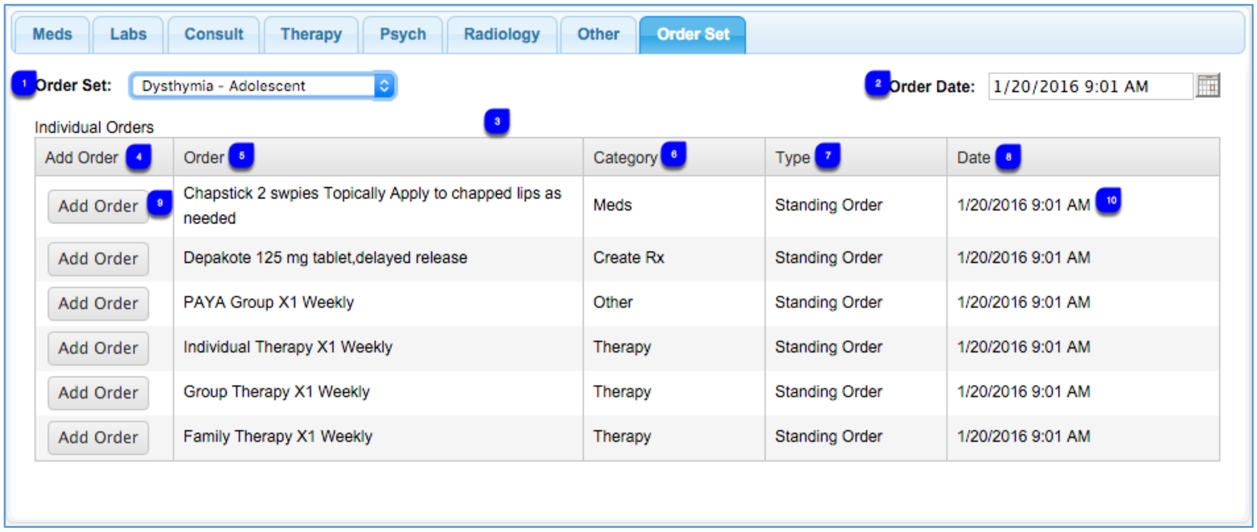
1. **Medication:** This is a search-as-you-type (SAYT) field. As you begin to enter the name of a medication, a dropdown is displayed with suggestions that you can choose from.
   Please note: For a medication to be verified through the *Med/Med* and *Med/Allergy Interaction* check, it must be selected from this dropdown.
2. **Dosage:** Enter the dosage in this field, (e.g., 2 tablets).
3. **Frequency:** Here you enter how frequently the dosage is to be administered (e.g., every morning).
4. **Rationale:** This is the field where you enter the reason for the medication, (e.g., headaches).
5. **Package Qty:** The quantity of tablets, pills, mgs, etc., for the medication is entered in this field.
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:** This dropdown allows you to select the Route for the medication (e.g., By Oral Route).
8. **Is Prescription:** If selected, this checkbox will flag the Medication as a Prescription.
9. **Pharmacy:** This field is where you can enter the name of the pharmacy where the prescription was filled. This field is only relevant if the Medication is a concurrent prescription that was filled at a pharmacy.
10. **Instructions:** Instructions for medication administration are entered here.
11. **Cancel** button**:** When clicked, all of the medication data entry fields are cleared.
12. **Add Meds Order** button**:** When you click this button after entering all required fields:
    - the Meds individual order will be saved for the Standing Order Set;
    - it will be added to the Meds Individual Order grid; and
    - all of the Meds data entry fields are cleared.

Labs/Consult/Therapy/Psych/Radiology/Other Entry



1. **Order Entry:** Enter the order information here.
2. **Cancel** button**:** When clicked, the **Order Entry** field is cleared.
3. **Add XX Order** button**:** (**XX** is replaced with the type of Order being entered.) When you click this button while the Order Entry field is populated:
   - the Individual Order will be saved for the Standing Order Set;
   - it will be added to the Individual Order grid; and
   - the Order Entry field will be cleared.

Order Set Tab



1. **Order Set:** This dropdown displays all activated Standing Order Sets to which the selected provider has been assigned. When a Standing Order is selected, the Individual Orders associated with it are displayed in the **Individual Orders** grid.
2. **Order Date:** This date/time picker defaults to the date and time when the Order Set tab was loaded. If you select a new date and/or time, all Individual Orders on the page will update to the new values, with the exception of any Individual Orders which have previously had the Date value manually modified.
3. **Individual Orders:** This grid displays all Individual Orders that are associated with the selected Standing Order Set.
4. **Add Order:** This column holds the **Add Order** button.
5. **Order:** This column displays the actual Order.
6. **Category:** This column displays the Individual Order's category, (e.g., Meds, Therapy, Other, etc.).
7. **Type:** This column displays the Individual Order's Type. For Standing Order Sets, the order type will always be Standing Order.
8. **Date:** This column displays the date/time stamp for when the order takes effect.
9. **Add Order** button**:** Click this button to begin the workflow to add the Individual Order. Please note: For **Add Medication** and **Create Prescription** Individual Orders, the **Add Order** button will only be enabled if the user's Profile Code has the Security Matrix rights *RxUpdate* and *PrescriptionCreate*, respectively.
10. **Individual Order:** If you click on the **Date** value on an Individual Order, the field becomes editable. This allows you to 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 by using the **Order Date** picker (see **2**).

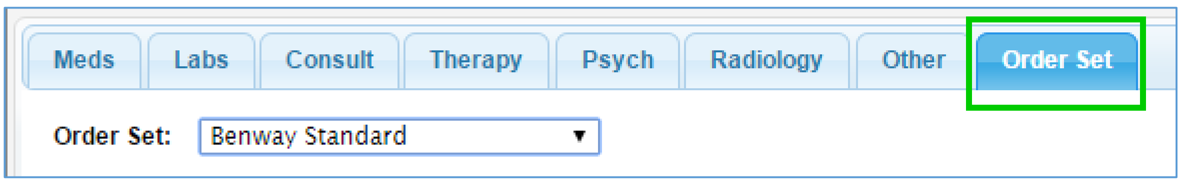
Add Individual Order

Add Text Entry Individual Order

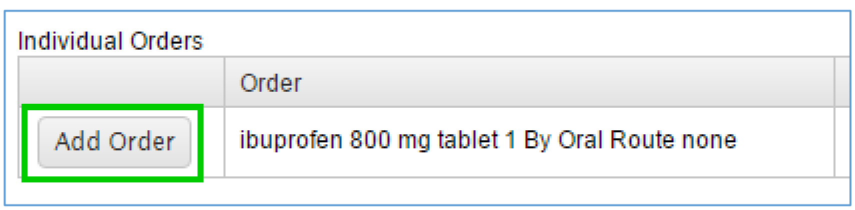
Add Text Entry Individual Order	
Use	Add a non-medication individual order
Required Security Matrix Rights	PhysicianOrdersView; PhysicianOrdersAdd
Partner Configs	Use Standing Order Sets

Steps to Complete Workflow

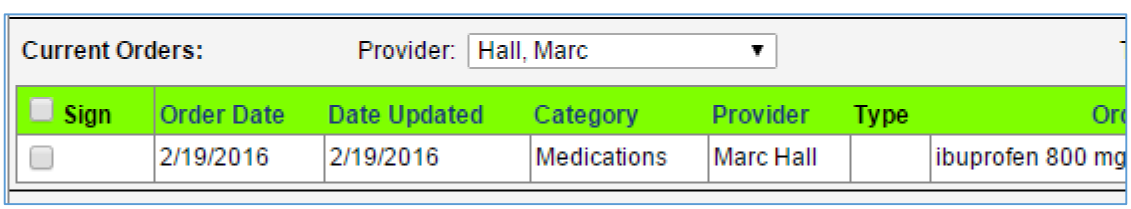
1. Filter by the desired prescriber.
2. Click the **Order Set** tab.



3. Click the **Add Order** button for the desired Individual Order.



4. The Individual Order is added to the **Current Unsigned** orders Category.

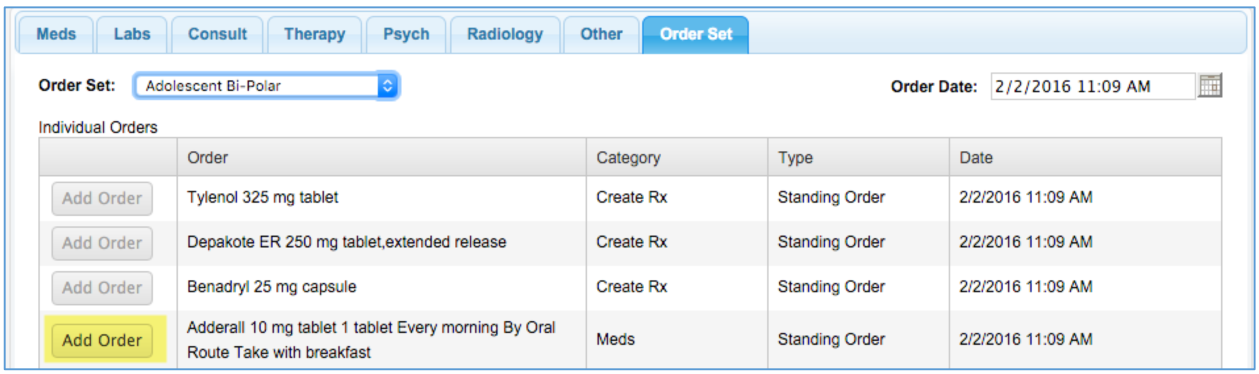


Add Medication Individual Order

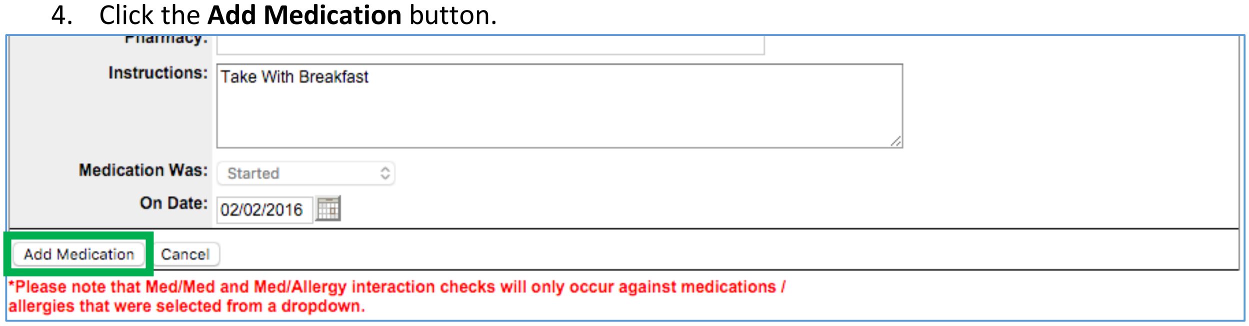
Add Medication Individual Order	
Use	Add a non-medication individual order
Required Security Matrix Rights	PhysicianOrdersView; PhysicianOrdersAdd; RxUpdate
Partner Configs	Use Standing Order Sets

Steps to Complete Workflow

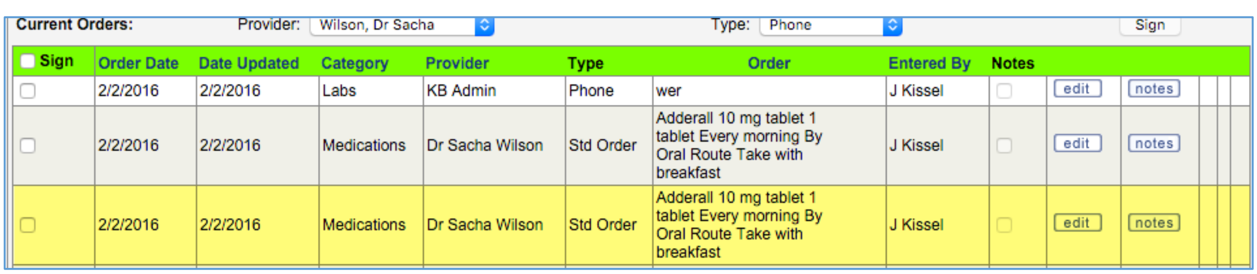
1. Filter on the desired prescriber.
2. Click the **Order Set** tab.
3. Click the **Add Order** button for the desired Individual Order.



4. Click the **Add Medication** button.



5. The **Meds** record is created, and the Individual Order appears in the **Current Unsigned** orders **Category**.

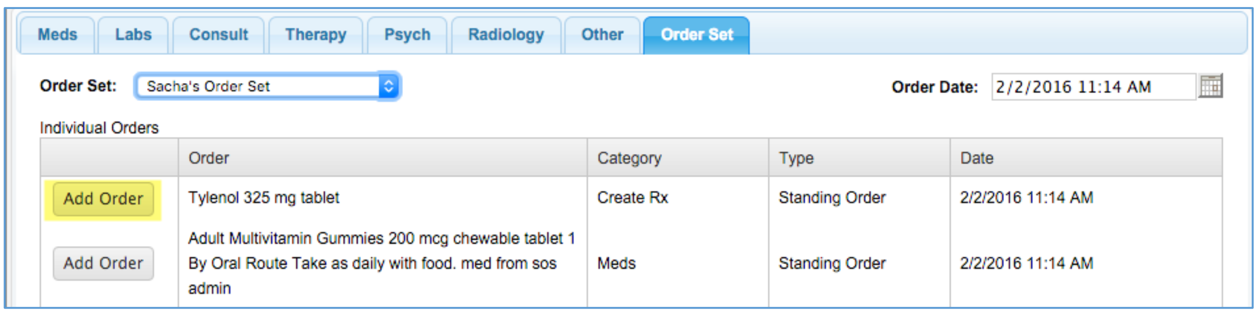


Add Create Prescription Individual Order

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

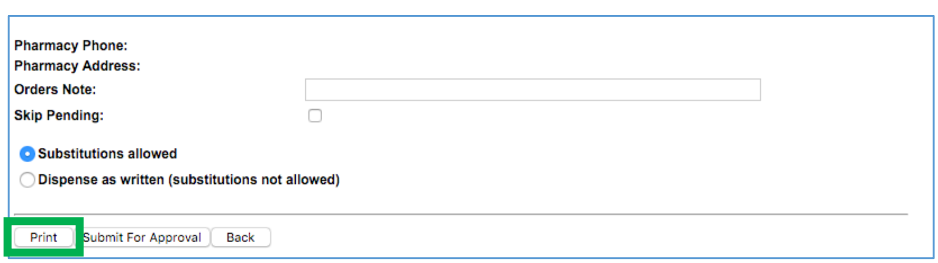
Steps to Complete Workflow

1. Filter on the desired prescriber. Please 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 the **Order Set** tab.
3. Click the **Add Order** button for the desired Individual Order.



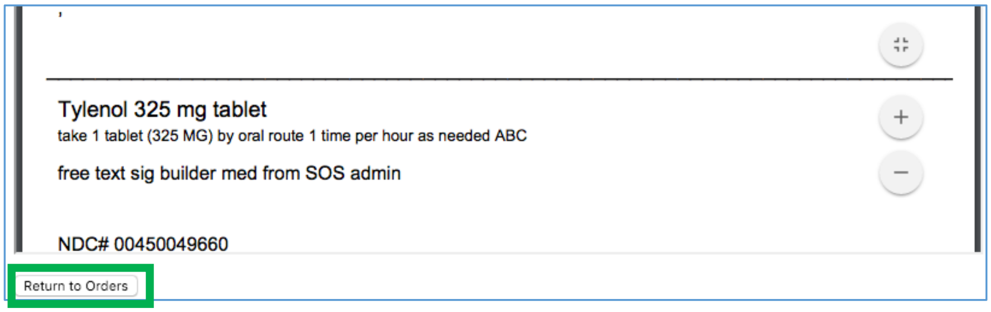
4. After adding the order, you will be moved to the next step in the workflow. All of the required fields have been pre-populated from the Individual Order's data.

5. Click either the **Print Prescription** or **Send to Pharmacy** button.
6. The user moves to the next step in the workflow.

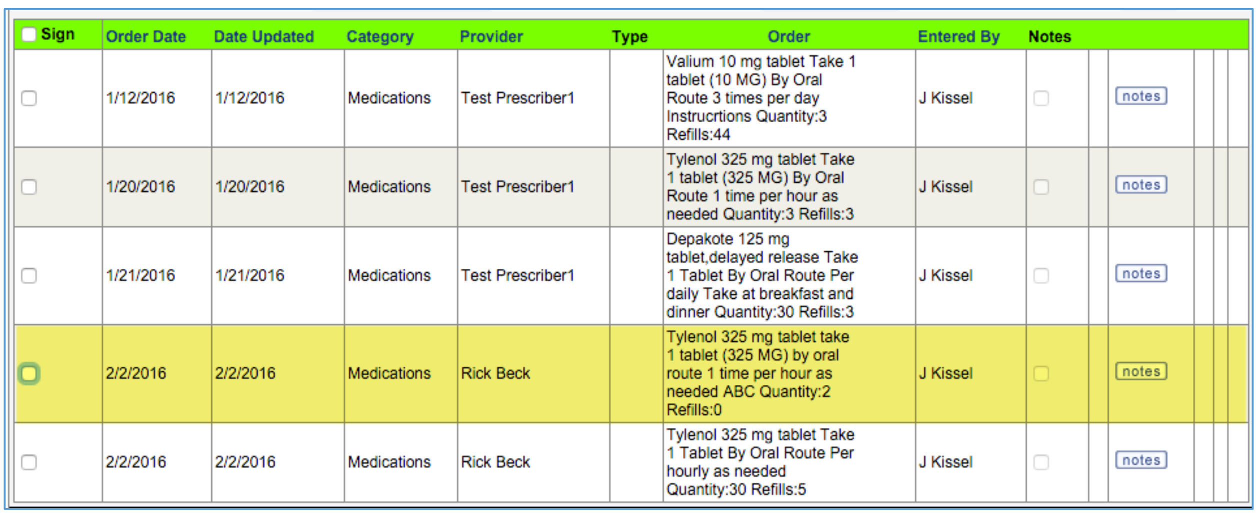


CREDIBLE

7. In the illustration above, the user clicked on **Print Prescription** in step 5. Update any desired fields, and click the **Print** button.
8. You will progress to the **RxPrintout** page.



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.



Sign	Order Date	Date Updated	Category	Provider	Type	Order	Entered By	Notes	
	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 Instrucrtions Quantity:3 Refills:44	J Kissel		notes
	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		notes
	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		notes
	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		notes
	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		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.