CREDIBLE
Behavioral Health Software

Standing Order Sets Manual

Table of Contents

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Standing Order Sets Administration

1. **Breadcrumbs:** The breadcrumbs allow the user to see the path they took to arrive at the page that they are currently on in the Standing Orders admin.
2. **Show Deactivated/Hide Deactivated Link:** By default, deactivated Standing Order Sets are hidden from view. To view deactivated sets, the user must click on the **Show Deactivated** link. When a user clicks on this link, the deactivated orders are displayed in the grid and the link becomes the **Hide Deactivated** link. When clicked again, the deactivated standing order sets are hidden, the active sets are displayed, and the link switches back to **Show Deactivated**.
3. **Standing Order Sets Search Field:** This field filters the displayed Standing Order Sets to only show those sets with names starting with the entered characters.
4. **ID:** This column displays the ID of the Standing Order Set.
5. **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.
6. **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.
7. **Date Activated:** This column displays the date/time stamp on which the set was activated.
8. **Date Deactivated:** This column displays the date/time stamp on which the set was deactivated.
9. **View:** 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.
10. **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.

11. **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.
12. **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.
13. **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
14. **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.
15. **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.
16. **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.
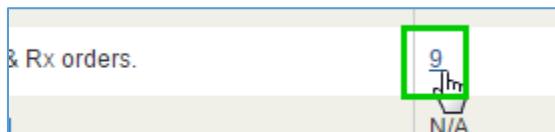
Assign/Unassign Employee Workflow

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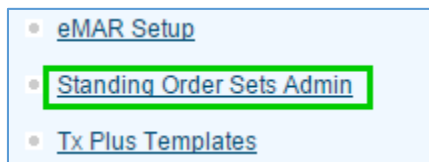
2. Click the numeric link in the **Employee** column.

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

Steps to Complete Workflow

1. Navigate to **Admin** tab > **Daily Activities** > **Standing Order Sets Admin**.
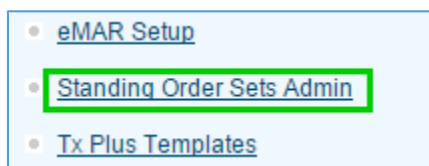
2. Click the **View** button for the Standing Order Set.
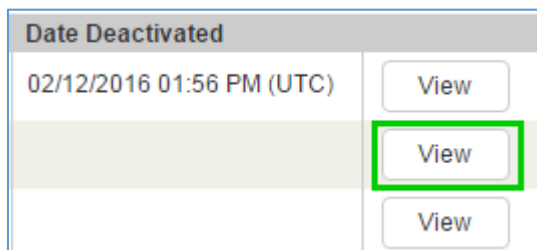
3. Click on the specific **Category** you want to view (Create Rx, Meds, Labs, etc.).
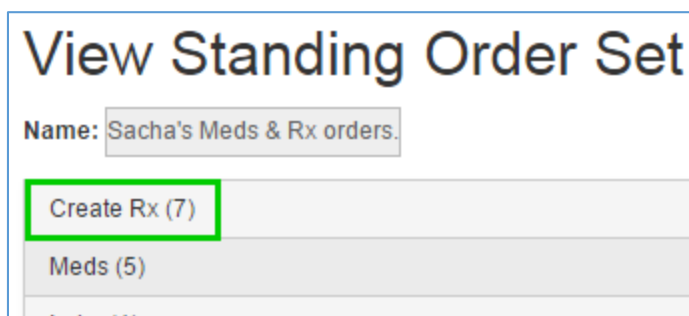
4. The category will expand, displaying the Individual Order grid, as well as the display area.

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.**

   - eMAR Setup
   - Standing Order Sets Admin
   - Tx Plus Templates
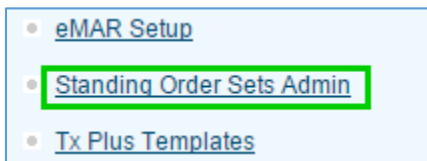
2. Click the **Edit** button for the Standing Order Set.

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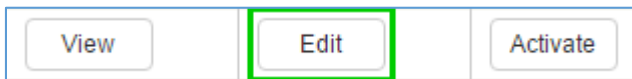
3. Click the **Category** for the individual order that you want to edit.

   Radiology (0)
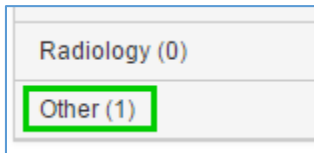
   Other (1)

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

   Order

   20 Minutes of exercise per day   Edit   Delete

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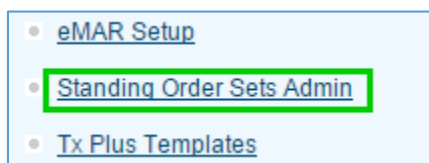
Please note: If you edit a **Create Prescription** or **Add Medication** individual order, all fields are editable, and the data is populated into the appropriate fields.

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.**

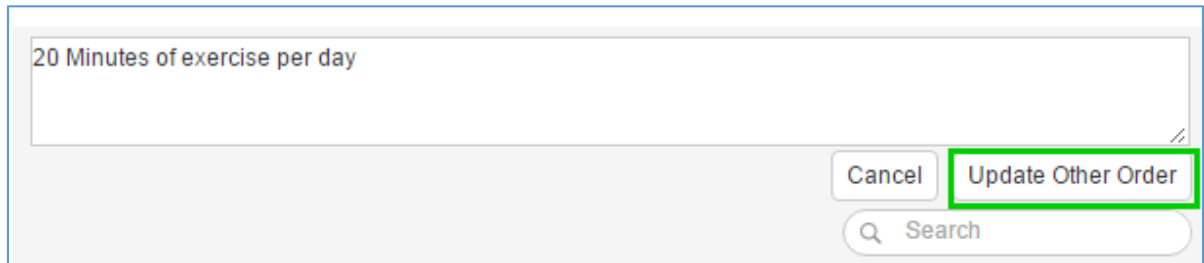2. Click the **Activate** button for the Standing Order Set you want to make available.
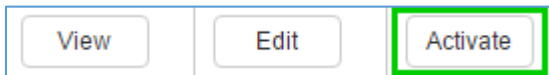
3. A popup confirmation will be displayed.
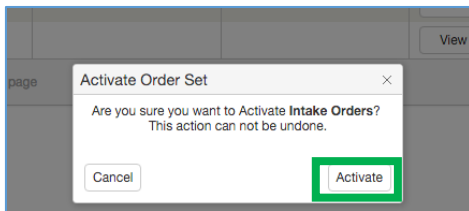
4. Click the popup's **Activate** button to activate the Standing Order Set.
5. The popup goes away, and the set is now activated.
6. The activation date of the Standing Order Set is displayed in the **Date Activated** field, and the Activate button turns to **Deactivate**.
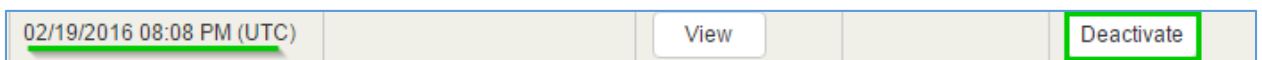
Please note: All logged date/time stamps (including HIPAA Log, Admin Log, and Activation/Deactivation Date) are currently displayed as UTC date/time stamps.

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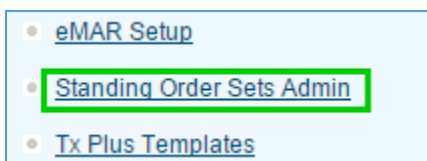
2. Click the **Deactivate** button to deactivate the appropriate Standing Order Set.

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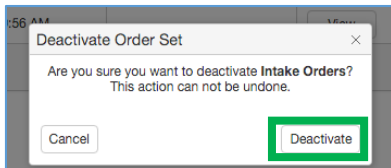
4. Click the **Deactivate** button to deactivate the Standing Order Set.
5. The popup disappears, and the Standing Order Set is now deactivated.

6. If Deactivated Standing Order Sets are currently set to be hidden, the set is hidden as soon as the **Deactivate** button is clicked on the popup. Otherwise:
   a. the deactivation date of the Standing Order Set is displayed in the *Date Deactivated* field; and
   b. The **Employee Count/Assignment/Unassignment** link is not displayed, and is replaced with an **N/A** label. This occurs because 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.
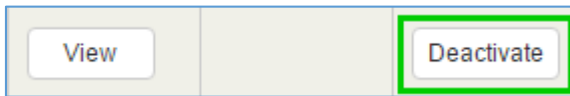
Clone Standing Order Set

Clone Standing Order Set	
Use	Clone a Standing Order Set. Standing Order Sets should be cloned when a similar Standing Order Set needs to be created. This cuts down on data re-entry time.
Required Security Matrix Rights	SOSClone
Partner Configs	Use Standing Order Sets

Steps to Complete Workflow

1. Navigate to **Admin** tab > **Standing Order Sets Admin**.
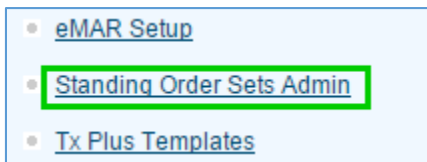
2. Click the **Clone** button to clone the Standing Order Set.

3. Credible will create a clone of the existing Standing Order Set, which will be named [*Name of Standing Order Set] (Clone)*. For example, a clone of *Adolescent Bi-Polar* would be named *Adolescent Bi-Polar (Clone).*
4. The name of the Standing Order Set and the individual orders within the set can be updated using the *Edit Standing Order Sets* workflow.

Standing Order Set Page

Name Page
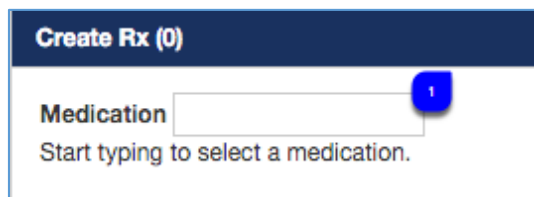
1. **Standing Order Set Name:** Enter the name of the Standing Order Set in this field. A name must be provided before it can be created.
2. **Create** button**:** If the Standing Order Set name field is populated, clicking this button will move you to the next step in the *New Standing Order Set* workflow.
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. **Supervising Provider**: This dropdown is only displayed if the selected provider's Profile Code has *Security Matrix: RequireSupervisingProvidereRx* checked. If this dropdown is displayed, the user will have to select a supervising provider. Please note: As in the *Create Prescription* workflow, the Supervising Provider dropdown is populated with all employees who have Credible Rx Provider records, and have the supervisor flag checked.

3. **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.
4. **Prescription Delivery Method**: This field displays the selected pharmacy. If the client has a *Primary Pharmacy* configured, this will default to that pharmacy. If the client does not have a *Primary Pharmacy* configured, or if the user would like to send *Create Prescription Individual Orders* to a different pharmacy, they need to select the pharmacy picker.
5. **Search Pharmacies**: When the user clicks this link, the pharmacy picker popup will be displayed, allowing the user to select the pharmacy that *Create Prescription* individual orders are sent to.
6. **Individual Orders:** This grid displays all Individual Orders that are associated with the selected Standing Order Set.
7. **Select All**: When the user clicks this check box, all of the individual order line items will be selected (checked) or deselected (un-checked), depending on the current state of the Select All check box. If the Select All check box is empty and the user clicks it, all individual order line items will be marked as selected. If it is already checked when the end user clicks it, all individual order line items will be unchecked. Please note: Only those individual orders that are selected will be ordered when the user clicks the *Add Orders* button.
8. **Order Detail**: This column displays the actual Order.
9. **Category:** This column displays the Individual Order's category, (e.g., Meds, Therapy, Other, etc.).
10. **Date:** This column displays the date/time stamp for when the order takes effect.
11. **Pharmacy**: This column displays the pharmacy that will receive the individual order.
12. **Individual Order checkbox**: This checkbox allows individual orders to be selected/deselected. Only those individual orders that are selected will be ordered when the user clicks the *Add Orders* button.
13. **Add Orders**: When clicked, all selected individual orders will be ordered for the client. If any Med/Med or Med/Allergy interaction warnings exist, the user will be informed of them when this button is clicked.

Add Individual Order

Add Text Entry Individual Order	
Use	Add individual Order
Required Security Matrix Rights	*PhysicianOrders*; *PhysicianOrdersAdd*; *RxUpdate* (for Add Medication individual orders); *PrescriptionCreate* (for Create Prescription individual orders)
Partner Config	Use Standing Order Sets

Steps to Complete Workflow

1. Filter by the desired prescriber.

Provider: Hall, Marc

2. Click the **Order Set** tab and selected the desired Order Set from the dropdown.

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

Order Set: Benway Standard

3. Select (check) the desired Individual Order(s), then click the **Add Orders** button.

Individual Orders

	Order Details
☑	ibuprofen 800 mg tablet 1 By Oral Route none

Add Orders

4. The Individual Order(s) are added to the **Current Unsigned** orders Category.

Current Orders: Provider: Hall, Marc

Sign	Order Date	Date Updated	Category	Provider	Type	
☐	2/19/2016	2/19/2016	Medications	Marc Hall		ibuprofen
☐	4/6/2016	4/6/2016	Medications	Marc Hall		ibuprofen

Med/Med and Med/Allergy Interactions

Add Create Prescription Individual Order	
Use	If a Med/Med or Med/Allergy interaction exists, a popup notification is displayed. If the user wants to order the individual order despite the warning, they may choose to do so by overriding the warning. If the user overrides the warning, the override action will be logged, and the individual order will be added.
Required Security Matrix Rights	*PhysicianOrders*, *PhysicianOrdersAdd*, *RxUpdate* (for Add Medication individual orders), *PrescriptionCreate* (for Create Prescription Individual Orders)
Partner Config	Use Standing Order Sets

When this warning message appears, if you still want to issue the order:

1. Check the **Override** box.
2. Click the **Save** button.
3. The system automatically logs the override.
   - Log Action: SOS CONTRAINDICATION WARNING OVERRIDDEN
4. The system then adds the Individual Order.

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.