RESOURCE AND PATIENT MANAGEMENT SYSTEM

RPMS Electronic Health Record
(EHR)

Inpatient CAC Setup Guide

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FOREWORD

The Indian Health Service (IHS) Office of Information Technology (OIT) National Electronic Record (EHR) Training and Deployment Program "EHR for Inpatient" workgroup has diligently worked to prepare the necessary deployment and training documents to facilitate the deployment of EHR in the Inpatient setting. We hope that you find these documents helpful..

The Office of Information Technology would like to sincerely thank all the members and guests of this workgroup. They spent long hours preparing these documents and even longer documenting their experience and deserve our appreciation. Without these dedicated workgroup members this would not be possible. A special thanks to Shirley Teter, OIT, for her assistance in formatting and ensuring consistency in our documentation. We would like to give special recognition to Crow Indian Hospital (CIH), Fort Defiance Indian Hospital (FDIH) and Cherokee Indian Hospital Authority (CIHA) for their dedication in both deploying EHR within the Inpatient setting and serving as subject matter experts (SMEs) for this project. Finally, we are indebted to our colleagues in the Indian Health Service for their support, encouragement, and input.

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1.0   Inpatient Quick Order

This section explains how to make quick orders from the laboratory, radiology, and inpatient pharmacy packages. Order menus will be created and items added to the menus. Finally, the user should be able to use the quick order wizard to create package quick orders.

The Order Menu Management is where all the quick orders, order sets, and order menus are created. After they are made, they need to be added to the EHR order display using the menu Write Orders List (inpatient).

1.1   Making Quick Orders

Select the Create/Modify Quick Order (QOC) option on the Order Menu Management Menu (on the RPMS-EHR Configuration Master Menu) to display the following:

```
                        Create/Modify Quick Orders

Select QUICK ORDER NAME:
```

You can select from a list of quick orders. After selecting a quick order name, the system displays several parts of the quick order that you can edit.

1.1.1   Namespaces for Quick Orders

Namespace	Department
RA	Radiology
LR	Lab
PSO	Outpatient meds
PSJ	Inpatient (Unit dose) meds
PSJIV	IV piggybacks
PSIV	IV fluids and infusions
GMRC	Consults
OR	CPRS
FH	Dietary

Use namespace+Z = local quick order

1.1.2   Orderable Items

Orderable items must exist prior to creating quick orders. Configuration of the pharmacy, lab, and radiology packages creates orderable items. Consult setup also creates orderable items. For nursing and generic quick orders, the orderable item must first be created using CREATE/MODIFY ORDERABLE ITEMS.

1.1.3   Laboratory Test Quick Order

The laboratory quick order uses LR as the namespace and Z means local. Below are examples of the Lab Collect (LC), Immediate Collect (IC), and Ward/Clinic Collect (WC) lab quick orders for Creatinine.

Example Lab Collect (LC) quick order:

```
Select QUICK ORDER NAME: LRZ LC CREATININE
NAME: LRZ LC CREATININE// <Enter>
TYPE OF QUICK ORDER: LABORATORY
NAME: LRZ LC CREATININE  Replace     <Enter>
DISPLAY TEXT: Creatinine Today// <Enter>
VERIFY ORDER: YES// <Enter>




DESCRIPTION: Blood creatinine level ordered for today
Edit? NO//
  1><Enter>
ENTRY ACTION: <Enter>

Lab Test: CREATININE
   1  CREATININE
   2  CREATININE CLEARANCE (SO)
   3  CREATININE URINE  URINE CREATININE
CHOOSE 1-3: 1 <Enter>
SEND TO LAB - Means the patient is ambulatory and will be sent to the
Laboratory draw room to have blood drawn.
WARD COLLECT - Means that either the physician or a nurse will be collecting
the sample on the ward.
LAB BLOOD TEAM - Means the phlebotomist from Lab will draw the blood on the
ward.  This method is limited to laboratory defined collection times.
IMMEDIATE COLLECT BY BLOOD TEAM - Means the phlebotomist from Lab is on
call to draw blood on the ward. This method is available during times
defined by Laboratory.
     SP         Send patient to lab
     WC         Ward/Clinic collect
     LC         Lab blood team
     I          Immediate collect by blood team
Collected By: LC        Lab blood team
Collected Sample: BLOOD//
Collection Date/Time: Next Lab Collection
How often: ONCE <Enter>
Indication: <Enter>
Indication ICD9:// <Enter>

-------------------------------------------------------------------------
                   Lab Test: CREATININE
                Collected By: Lab blood team
           Collection Sample: BLOOD
                    Specimen: BLOOD
        Collection Date/Time: Next Lab Collection
                   How often: ONCE
-------------------------------------------------------------------------
(P)lace, (E)dit, or (C)ancel this quick order? PLACE//<Enter>
Auto-accept this order? NO <Enter>
```

Type **??** to view a list of types

Use **YES** or **NO** here. This field is a flag that determines if the order created by this dialog will be presented to the user for verification before saving in the orders file.

Example Immediate Collect (IC) quick order:

```
Select QUICK ORDER NAME: LRZ IC CREATININE
NAME: LRZ IC CREATININE// <Enter>
TYPE OF QUICK ORDER: LABORATORY

NAME: LRZ IC CREATININE  Replace     <Enter>
DISPLAY TEXT: Creatinine Today// <Enter>
VERIFY ORDER: YES// <Enter>




DESCRIPTION: Blood creatinine level ordered for today
Edit? NO//
  1><Enter>
ENTRY ACTION: <Enter>

Lab Test: CREATININE
   1  CREATININE
   2  CREATININE CLEARANCE (SO)
   3  CREATININE URINE  URINE CREATININE
CHOOSE 1-3: 1 <Enter>
SEND TO LAB - Means the patient is ambulatory and will be sent to the
Laboratory draw room to have blood drawn.
WARD COLLECT - Means that either the physician or a nurse will be collecting
the sample on the ward.
LAB BLOOD TEAM - Means the phlebotomist from Lab will draw the blood on the
ward.  This method is limited to laboratory defined collection times.
IMMEDIATE COLLECT BY BLOOD TEAM - Means the phlebotomist from Lab is on
call to draw blood on the ward. This method is available during times
defined by Laboratory.
     SP         Send patient to lab
     WC         Ward/Clinic collect
     LC         Lab blood team
     I          Immediate collect by blood team
Collected By: IC  Immediate collect by blood team
Collected Sample: BLOOD//
Collection Date/Time: NOW
How often: ONCE <Enter>
Indication: <Enter>
Indication ICD9:// <Enter>


-------------------------------------------------------------------------
                    Lab Test: CREATININE
               Collected By: Immediate collect by blood team
           Collection Sample: BLOOD
                    Specimen: BLOOD
       Collection Date/Time: NOW
                   How often: ONCE
-------------------------------------------------------------------------
(P)lace, (E)dit, or (C)ancel this quick order? PLACE//<Enter>
Auto-accept this order? NO <Enter>
```

> Type **??** to view a list of types

> Use **YES** or **NO** here. This field is a flag that determines if the order created by this dialog will be presented to the user for verification before saving in the orders file.

Example Ward/Clinic Collect (WC) quick order:

```
Select QUICK ORDER NAME: LRZ WC CREATININE
NAME: LRZ WC CREATININE// <Enter>
TYPE OF QUICK ORDER: LABORATORY


NAME: LRZ WC CREATININE  Replace    <Enter>
DISPLAY TEXT: Creatinine Today// <Enter>
VERIFY ORDER: YES// <Enter>




DESCRIPTION: Blood creatinine level ordered for today
Edit? NO//
  1><Enter>
ENTRY ACTION: <Enter>

Lab Test: CREATININE
   1   CREATININE
   2   CREATININE CLEARANCE (SO)
   3   CREATININE URINE  URINE CREATININE
CHOOSE 1-3: 1 <Enter>
SEND TO LAB - Means the patient is ambulatory and will be sent to the
Laboratory draw room to have blood drawn.
WARD COLLECT - Means that either the physician or a nurse will be collecting
the sample on the ward.
LAB BLOOD TEAM - Means the phlebotomist from Lab will draw the blood on the
ward.  This method is limited to laboratory defined collection times.
IMMEDIATE COLLECT BY BLOOD TEAM - Means the phlebotomist from Lab is on
call to draw blood on the ward. This method is available during times
defined by Laboratory.
      SP         Send patient to lab
      WC         Ward/Clinic collect
      LC         Lab blood team
      I          Immediate collect by blood team
Collected By: WC         Ward/Clinic collect
Collected Sample: BLOOD//
Collection Date/Time: TODAY
How often: ONCE <Enter>
Indication: <Enter>
Indication ICD9:// <Enter>


----------------------------------------------------------------------
                 Lab Test: CREATININE
             Collected By: Ward/Clinic collect
         Collection Sample: BLOOD
                 Specimen: BLOOD
       Collection Date/Time: TODAY
                How often: ONCE
----------------------------------------------------------------------
(P)lace, (E)dit, or (C)ancel this quick order? PLACE//<Enter>
Auto-accept this order? NO <Enter>
```

Type **??** to view a list of types

Use **YES** or **NO** here. This field is a flag that determines if the order created by this dialog will be presented to the user for verification before saving in the orders file.

Comments about the above order sample:

| NAME	This is the official name
DISPLAY TEXT	This is the name the user sees
VERIFY ORDER?	This controls whether the clinician is asked to edit the order
Collection Date/Time	Valid entries are Today (T), Now (N), N+3H, T+2, Next Lab Collection. Do not enter a specific date here for this type of test.
How Often	Valid choices might be: once, daily, Q4H. These must be defined in the Administration Schedule file for each package. Additional setup might be necessary for each individual package.
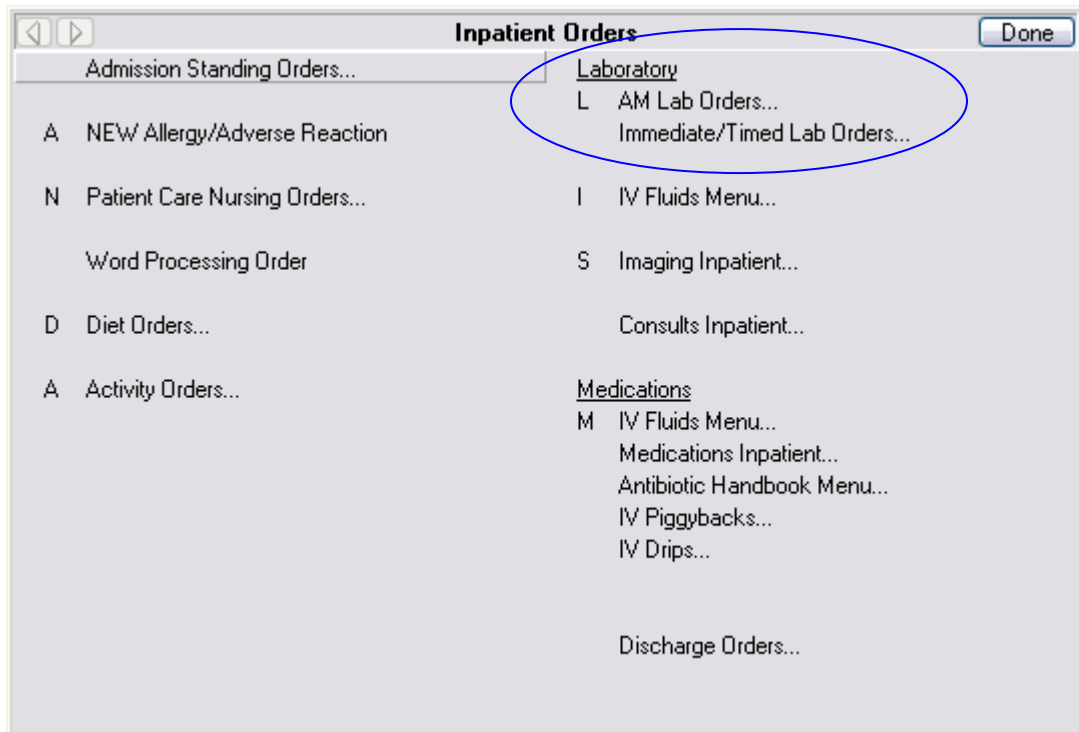
Figure 1-1: Inpatient Orders Menu Showing Laboratory Choices

1.1.4   All Other Labs Quickorder

This feature enables users to order labs that are not available as quickorders; the CAC can incorporate the quickorder LR OTHER LAB TESTS as a link to all other labs.
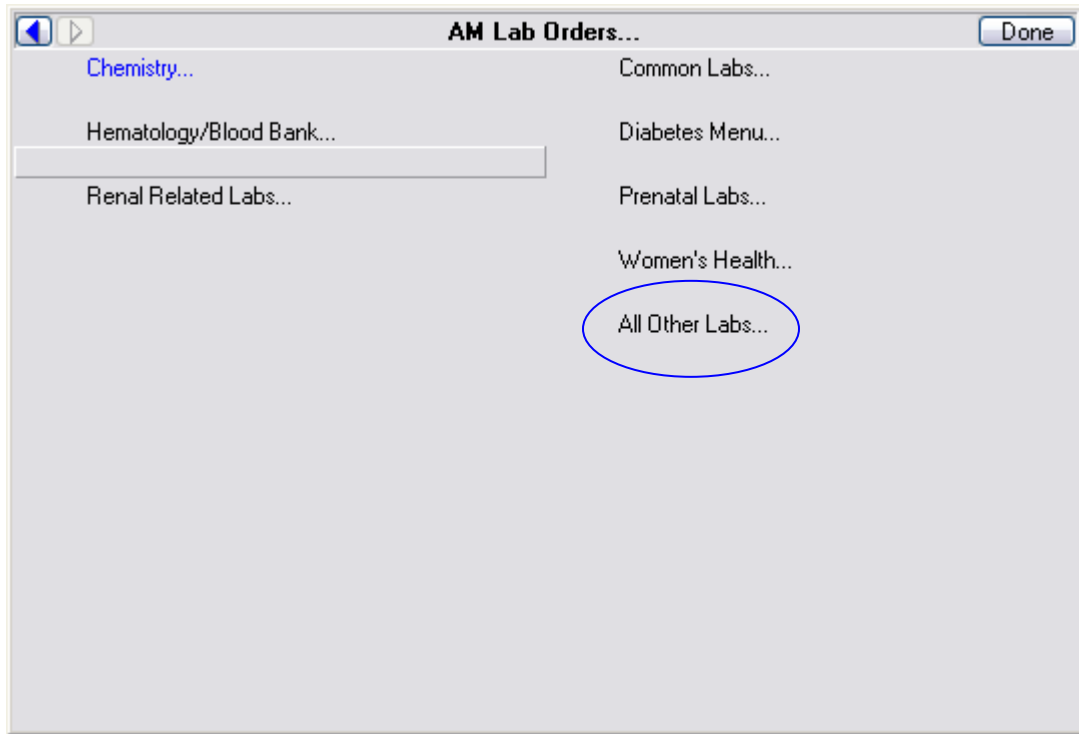
Figure 1-2: Sample AM Inpatient Labs
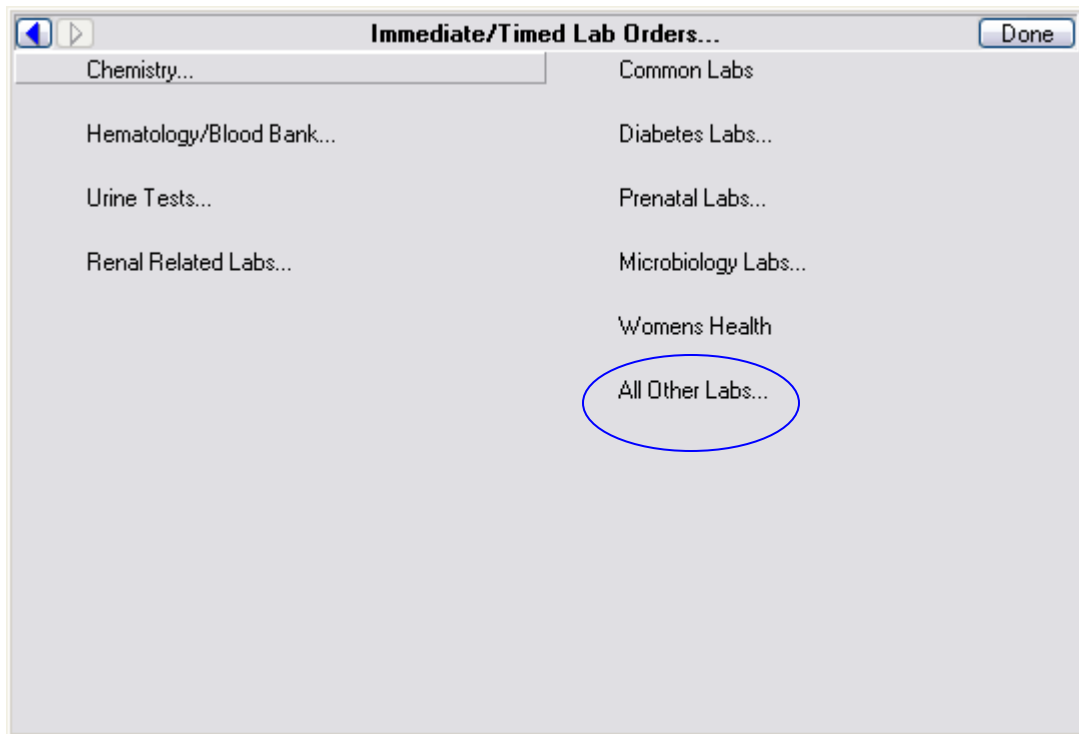
Figure 1-3: Sample Immediate/Timed Inpatient Labs

1.1.5   Radiology Quick Order

You might leave many of the prompts on the Radiology quick orders blank so that users can fill them in.

```
Select QUICK ORDER NAME: RAZ CHEST 2 VIEWS STAT TODAY
 Are you adding 'RAZ CHEST 2 VIEWS STAT TODAY' as a new ORDER DIALOG? No// Y
(Yes)
TYPE OF QUICK ORDER: IMAGING
NAME: RAZ CHEST 2 VIEWS STAT TODAY  Replace
DISPLAY TEXT: Stat Chest 2 views
VERIFY ORDER: Y  (Yes)
DESCRIPTION:
      1> <Enter>
  Edit OPTION: <Enter>
ENTER ACTION: <Enter>
Select one of the following imaging types:
   NUCLEAR MEDICINE → your locations depend upon how your Radiology Package has
                       been setup locally.
   GENERAL RADIOLOGY

Select IMAGING TYPE: GENERAL RADIOLOGY
```

> The application displays a list for the selected Imaging Types. This only shows the top 40 procedures (there could be others).

```
Common General Radiology Procedures:
  1 ABDOMEN 1 VIEW                   21 FOOT 3 OR MORE VIEWS
  2 ABDOMEN 2 VIEWS                  22 FOREARM 2 VIEWS
  3 ANKLE 3 OR MORE VIEWS            23 HAND 3 OR MORE VIEWS
  4 CALCANEOUS 2 VIEWS               24 HIP 1 VIEW
  5 CHEST 2 VIEWS PA&LAT             25 HUMERUS 2 OR MORE VIEWS
  6 CHEST SINGLE VIEW                26 KNEE 3 VIEWS
  7 CHOLECYSTOGRAM ORAL CONT         27 NASAL BONES MIN 3 VIEWS
  8 COLON AIR CONTRAST               28 NON-INVAS.,DUPLEX SCAN OF CRAN
  9 COLON BARIUM ENEMA               29 PELVIS 1 VIEW
 10 CT ABDOMEN W/O CONT              30 RIBS UNILAT 2 VIEWS
 11 CT CERVICAL SPINE W/O CONT       31 SHOULDER 2 OR MORE VIEWS
 12 CT HEAD W/O CONT                 32 SINUSES 3 OR MORE VIEWS
 13 CT LUMBAR SPINE W/O CONT         33 SKULL 4 OR MORE VIEWS
 14 CT MAXILLOFACIAL W/O CONT        34 SPINE CERVICAL MIN 4 VIEWS
 15 CT NECK SOFT TISSUE W/O CONT     35 SPINE LUMBOSACRAL MIN 2 VIEWS
 16 CT THORAX W/O CONT               36 SPINE THORACIC 2 VIEWS
 17 ELBOW 3 OR MORE VIEWS            37 TIBIA & FIBULA 2 VIEWS
 18 ESOPHAGUS                        38 UPPER GI AIR CONT W/O KUB
 19 ESOPHAGUS RAPID SEQUENCE FILMS   39 UROGRAM IV W NEPHROTOMOGRAMS
 20 FEMUR 2 VIEWS                    40 WRIST 3 OR MORE VIEWS
Radiology Procedure: 5   CHEST 2 VIEWS PA&LAT
Procedure Modifier:
History and Reason for Exam:
```

> This is filled in by the provider when entering the order

```
  Edit OPTION: <Enter>

Category: <Enter>
```

> If Category is left blank, the current patient status will be assumed

```
Is this patient scheduled for pre-op? NO// <Enter>
Date Desired: TODAY// T  (AUG 30, 2008)
Mode of Transport: P  PORTABLE
Is patient on isolation procedures? <Enter>
Urgency: ROUTINE// STAT
Submit request to:
```

> You can leave this blank to allow the user to direct the request to the correct imaging

```
-----------------------------------------------------------------------------
        Radiology Procedure: CHEST 2 VIEWS PA&LAT
 History and Reason for Exam:
              Date Desired: TODAY
          Mode of Transport: PORTABLE
```

```
                      Urgency: STAT
              Submit request to:
----------------------------------------------------------------------

(P)lace, (E)dit, or (C)ancel this quick order? PLACE//  <Enter>
Auto-accept: NO <Enter>
```

1.1.6   Consults Quick Order

Below is a sample Consults quick order.

```
Select QUICK ORDER NAME: GMRCZ PHYSICAL THERAPY
  Are you adding 'GMRCZ PHYSICAL THERAPY' as
    a new ORDER DIALOG? No// Y  (Yes)
TYPE OF QUICK ORDER: CONSULTS
NAME: GMRCZ PHYSICAL THERAPY  Replace
DISPLAY TEXT: Physical Therapy
VERIFY ORDER:
DESCRIPTION:
  No existing text
  Edit? NO//
ENTRY ACTION:

Consult to Service/Specialty: PHYSICAL THERAPY
Consult Type:
Reason for Request:
  No existing text
  Edit? No//    (No)
Category: OUTPATIENT
Urgency: ROUTINE//
Place of Consultation: CONSULTANT'S CHOICE
Attention:
Provisional Diagnosis:


-----------------------------------------------------------
Consult to Service/Specialty: PHYSICAL THERAPY
                   Category: OUTPATIENT
                    Urgency: ROUTINE
       Place of Consultation: Consultant's Choice
-----------------------------------------------------------

(P)lace, (E)dit, or (C)ancel this quick order? PLACE//
Auto-accept this order? NO//
```

1.1.7 Inpatient Pharmacy Quick Orders

A site will probably want to either have someone from pharmacy create the quick orders for medications or at least have a pharmacist review them before users can access them. PS is the namespace for pharmacy.

1.1.7.1   Unit Dose Medications

Below is an example of an inpatient pharmacy unit dose order. Unit dose orders include oral, ophthalmic, otic, nasal, inhalation, rectal, topical, subcutaneous, intramuscular, and intravenous push medication routes.

```
Select QUICK ORDER NAME: PSJZ METFORMIN 500MG BID
  Are you adding 'PSJZ METFORMIN 500MG BID' as
    a new ORDER DIALOG? No// Y  (Yes)
TYPE OF QUICK ORDER: INPATIENT MEDICATIONS
NAME: PSJZ METFORMIN 500MG BID  Replace
DISPLAY TEXT: Metformin 500mg BID
VERIFY ORDER: y  YES
DESCRIPTION:
  No existing text
  Edit? NO//
ENTRY ACTION:

Medication: METFORM
     1    METFORMIN TAB,ORAL
     2    METFORMIN TAB,SA
CHOOSE 1-2: 1    METFORMIN TAB,ORAL
Complex dose? NO//
Choose from (or enter another):
     1    500MG
     2    850MG
     3    1000MG
     4    1700MG
Dose: 1    500MG
Route: ORAL//
Schedule: BID//
Give First Dose NOW? NO//
Priority: ROUTINE//
Comments:
  No existing text
  Edit? No//   (No)


------------------------------------------------------------------------------
                  Medication: METFORMIN TAB,ORAL
                Instructions: 500MG ORAL BID
                    Priority: ROUTINE
------------------------------------------------------------------------------

(P)lace, (E)dit, or (C)ancel this quick order? PLACE//
Auto-accept this order? NO//
```

1.1.7.2   IV Piggybacks

```
Select QUICK ORDER NAME: PSJIVZ CEFTRIAXONE 1GM Q24H
  Are you adding 'PSJIVZ CEFTRIAXONE 1GM Q24H' as
    a new ORDER DIALOG? No// Y  (Yes)
TYPE OF QUICK ORDER: INPATIENT MEDICATIONS
NAME: PSJIVZ CEFTRIAXONE 1GM Q24H  Replace
DISPLAY TEXT: Ceftriaxone 1gm IVPB Q24H
VERIFY ORDER: y  YES
DESCRIPTION:
  No existing text
  Edit? NO//
ENTRY ACTION:

Medication: CEFT
     1    CEFTAZIDIME INJ
     2    CEFTAZIDIME OPH
     3    CEFTRIAXONE INJ,SOLN
CHOOSE 1-3: 3   CEFTRIAXONE INJ,SOLN
Complex dose? NO//
Choose from (or enter another):
     1    1GM/1VIAL      $0.569
```

```
     2   1GM/1VIAL
     3   2GM/2VIAL      $1.138
     4   2GM/2VIAL
Dose or Rate: 1   1GM/1VIAL      $0.569
   ...OK? YES//
Route: INTRAMUSCULAR// IVPB  IV PIGGYBACK      IVPB
Schedule: Q24H
Give First Dose NOW? NO//
Priority: ROUTINE//
Comments:
  No existing text
  Edit? No//   (No)


-----------------------------------------------------------
                 Medication: CEFTRIAXONE INJ
               Instructions: 1GM/1VIAL IV PIGGYBACK Q24H
                   Priority: ROUTINE
-----------------------------------------------------------

(P)lace, (E)dit, or (C)ancel this quick order? PLACE//
Auto-accept this order? NO//
```

1.1.7.3 IV Fluids / IV Infusions

This includes large volume IV fluids, K riders, and IV infusions. In the Pharmacy package these are referred to as admixtures. Must set up the pharmacy drug file orderable item for the prompt "Used in IV Fluid Order Entry?" to YES.

Example IV Fluid:

```
Select Order Menu Management Option:  Enter/edit quick orders

Select QUICK ORDER NAME: PSIVZ D5W 1000ML INJ
  Are you adding ' PSIVZ D5W 1000ML INJ ' as a new ORDER DIALOG? No// Y
(Yes)
TYPE OF QUICK ORDER: IV MEDICATIONS
NAME: PSIVZ D5W 1000ML INJ // <Enter>
DISPLAY TEXT: D5W 1000ML
VERIFY ORDER: NO// Y  (Yes)
DESCRIPTION:
  No existing text
  Edit? NO// <Enter>
Entry Action: <Enter>
Solution:     D5W INJ,SOLN IV
Additive: <Enter>
Infusion Rate: <Enter>
Priority: ROUTINE// <Enter>
Provider Comments:
Edit OPTION: <Enter>


------------------------------------------------------------------------
                 Solutions: D5W INJ,SOLN IV 1000 ml
                 Additives:
             Infusion Rate:
                  Priority: ROUTINE
         Provider Comments:
------------------------------------------------------------------------

(P)lace, (E)dit, or (C)ancel this quick order? PLACE//<Enter>
Auto-accept this order? NO <Enter>
```

Example IV Infusion:

```
Select QUICK ORDER NAME: PSIVZ AMINOPHYLLINE 1GM
 Are you adding 'PSIVZ AMINOPHYLLINE 1GM' as a new ORDER DIALOG? No// Y(Yes)
TYPE OF QUICK ORDER: IV MEDICATIONS
NAME: PSIVZ AMINOPH 1GM// <Enter>
DISPLAY TEXT: Aminophylline drip
VERIFY ORDER: NO// Y  (Yes)
DESCRIPTION:
  No existing text
  Edit? NO// <Enter>
Entry Action: <Enter>
Solution:     D5W INJ,SOLN IV
Additive: AMINOPHYLLINE INJ,SOLN IV    AMINOPHYLLINE INJ,SOLN IV
 (Units for this additive are MG)
Strength: 1000
Another Additive: <Enter>
Infusion Rate: 10
Priority: ROUTINE// <Enter>
Provider Comments:
 1> Titrate to effect.
 2> <Enter>
Edit OPTION: <Enter>



     ------------------------------------------------------------------
                   Solutions: D5W INJ,SOLN IV 1000 ml
                   Additives: AMINOPHYLLINE INJ,SOLN IV 1000 MG
               Infusion Rate: 10 ml/hr
                    Priority: ROUTINE
           Provider Comments: Titrate to effect.
     ------------------------------------------------------------------

(P)lace, (E)dit, or (C)ancel this quick order?  PLACE//<Enter>
Auto-accept this order? No <Enter>
```

1.1.8   "All Other Meds" Pharmacy Order Dialog
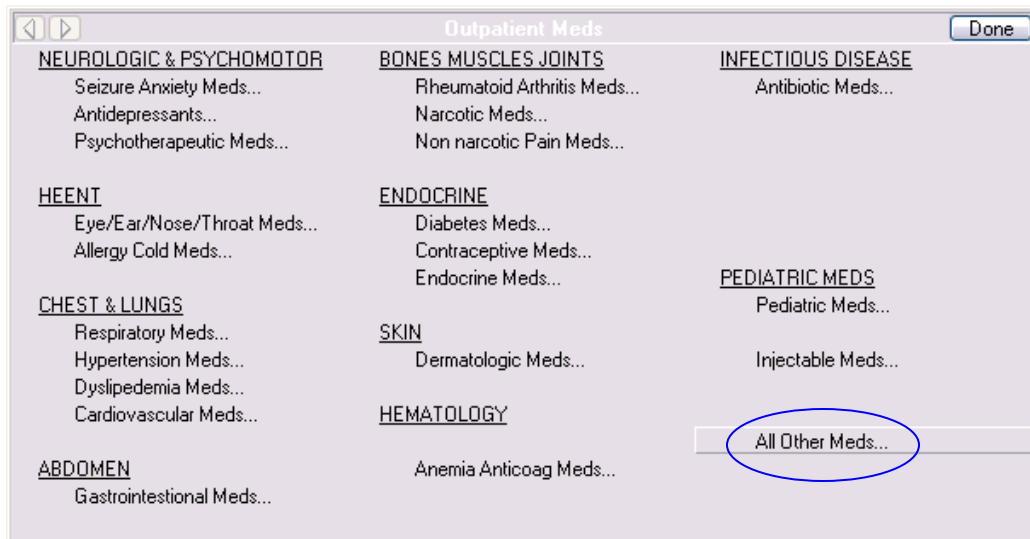
Figure 1-4: Accessing the "All Other Meds" Option

When you click **All Other Meds**, the following Medication Order dialog displays.
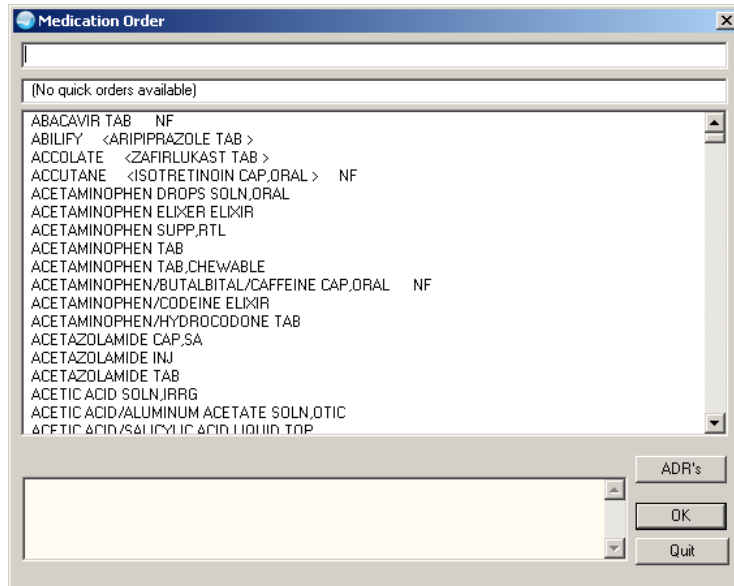
Figure 1-5: Sample Medication Order Dialog

1.1.9   Nursing Quick Order

Below is an example of a Nursing quick order. For nursing and generic quick orders, the orderable item must first be created using CREATE/MODIFY ORDERABLE ITEMS. Do not use nursing quick orders or generic quick orders for pharmacy, lab, or radiology!

```
Select Order Menu Management Option:  Enter/edit quick orders

Select QUICK ORDER NAME: NURSING
NAME: ORZ FOLEY CATHETER// <Enter>
DISPLAY TEXT: Foley Catheter to Drainage
VERIFY ORDER: <Enter>
DESCRIPTION:
No existing text
  Edit NO//
ENTER ACTION:
Patient Care: FOLEY CATHETER
Instruction: Empty drainage bag q shift
Start Date/Time: NOW//
Stop Date/Time: t+2
-------------------------------------------------------------------------
              Patient Care: FOLEY CATHETER
              Instructions: Empty drainage bag q shift
          Start Date/Time: NOW
           Stop Date/Time: 2 DAYS FROM TODAY
-------------------------------------------------------------------------

(P)lace, (E)dit, or (C)ancel this quick order? PLACE//  <Enter>
```

1.2   Template Fields and Data Objects in Orders

The following addresses where template fields and data objects are used and how to use them in orders.

1.2.1   Where Template Fields and Data Objects Are Used

Template fields and data objects are not restricted to just templates. They can be used in the following:

- Templates
- Template Dialogs
- Orders that have free-text fields
- Reason for Request for Consults
- Reminder Dialogs

1.2.2   Using Template Fields and Data Objects in Orders

These can be inserted into a generic order, the comments section of pharmacy quick orders, radiology quick order in the Reason for Request, and consult orders.

Below are examples of this concept. The first screen shot is the RPMS setup, the second screen shot is how the order appears in EHR.

Medication order using a data object

```
NAME: PSJIVZ VANCOMYCIN 1GM Q12H  Replace
DISPLAY TEXT: Vancomycin 1 Gm Q12H  Replace
VERIFY ORDER: YES//
DESCRIPTION:
  No existing text
  Edit? NO//
ENTRY ACTION:

Medication: VANCOMYCIN INJ //
Complex dose? NO//
Dose or Rate: 1GM/1VIAL//
Route: IV PIGGYBACK//
Schedule: Q12H//
Give First Dose NOW? NO//
Priority: ROUTINE//
Comments:
  |LAST LAB CREATININE|
  Edit? No//   (No)


------------------------------------------------------------
               Medication: VANCOMYCIN INJ
             Instructions: 1GM/1VIAL IV PIGGYBACK Q12H
                 Priority: ROUTINE
                 Comments: |LAST LAB CREATININE|
------------------------------------------------------------

(P)lace, (E)dit, or (C)ancel this quick order? PLACE//
```

Figure 1-6: Med Order with Data Objects

Radiology orders using a template field

```
NAME: RAZ CHEST PORTABLE//
DISPLAY TEXT: Chest X Ray Portable  Replace
VERIFY ORDER: YES//
DESCRIPTION:
  No existing text
  Edit? NO//
ENTRY ACTION:

Radiology Procedure: CHEST SINGLE VIEW//
Procedure Modifiers:
  1: PORTABLE EXAM
  2: <enter more>
Select (1-2) or <return> to continue:
History and Reason for Exam:
  {FLD:CHEST PAIN/COUGH/SOB/OTHER} {FLD:GEN TEXT 15}
  Edit? No//   (No)
Category: INPATIENT//
Ordering Location: GENERAL//
Is this patient scheduled for pre-op? NO//
Date Desired: TODAY//
```

```
Mode of Transport: PORTABLE//
Is patient on isolation procedures?
Urgency: ASAP//


------------------------------------------------------------
         Radiology Procedure: CHEST SINGLE VIEW
         Procedure Modifiers: PORTABLE EXAM
 History and Reason for Exam: {FLD:CHEST PAIN/COUGH/SOB/OTHER} {FLD:GE ...
                    Category: INPATIENT
           Ordering Location: GENERAL
                Date Desired: TODAY
           Mode of Transport: PORTABLE
                     Urgency: ASAP
           Submit request to: X-RAY
------------------------------------------------------------

(P)lace, (E)dit, or (C)ancel this quick order? PLACE//
Auto-accept this order? NO//
```
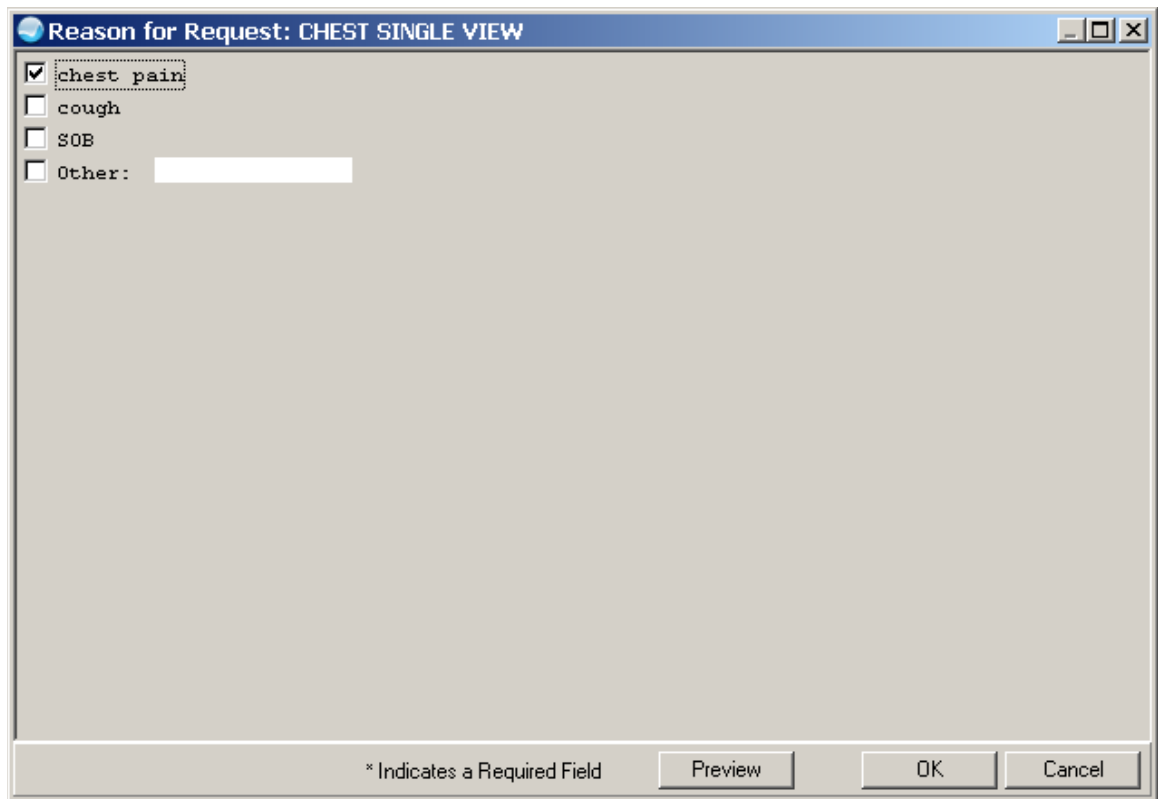

Figure 1-7: Template Popup First
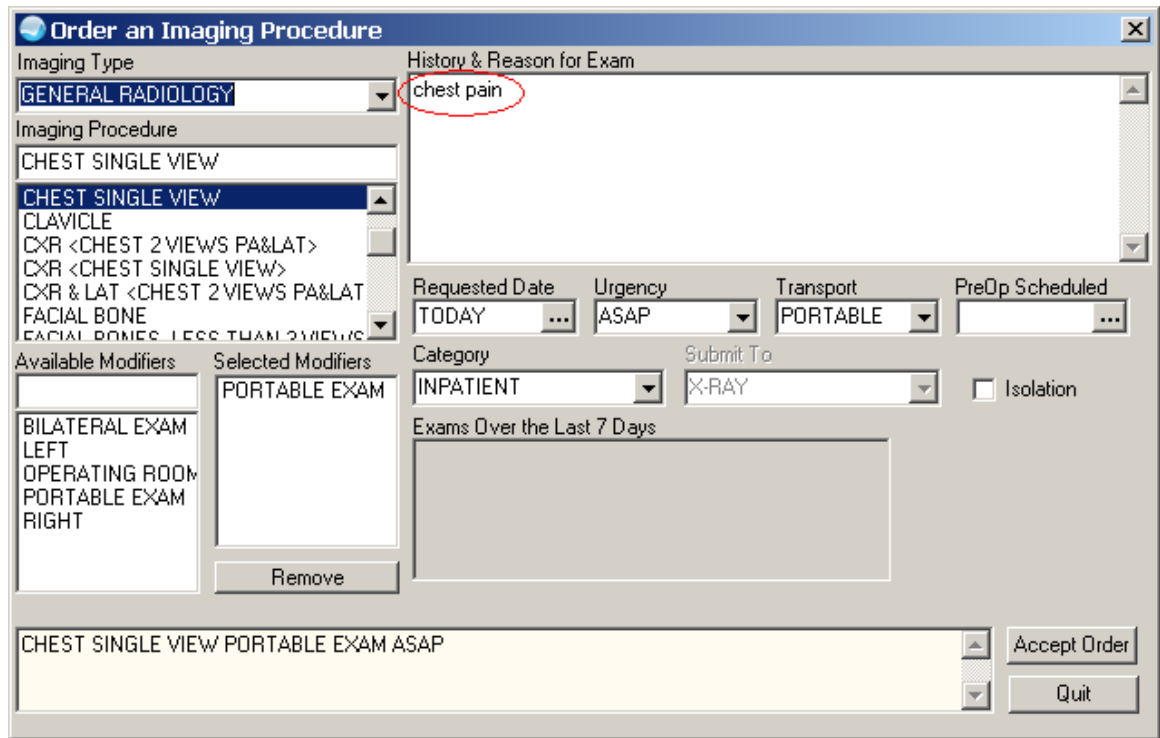
Figure 1-8: Text from the Template is Inserted into the Order

Generic text order using template fields

```
NAME: ORGXZ OXYGEN THERAPY   Replace
DISPLAY TEXT: Oxygen Therapy//
SIGNATURE REQUIRED:
VERIFY ORDER:
ASK FOR ANOTHER ORDER:
DESCRIPTION:
  No existing text
  Edit? NO//
ENTRY ACTION:
EXIT ACTION:
VALIDATION:
ADDITIONAL TEXT:
DISPLAY GROUP: NURSING//
Select PROMPT: ?
    Answer with ITEMS, or SEQUENCE
  Choose from:
  1      OR GTX ORDERABLE ITEM
  2      OR GTX WORD PROCESSING 1
  3      OR GTX START DATE/TIME
  4      OR GTX STOP DATE/TIME

      You may enter a new ITEMS, if you wish
      Type a Number between .1 and 999.9, 1 Decimal Digit

Select PROMPT: 2    OR GTX WORD PROCESSING 1
SEQUENCE: 2//
PROMPT: OR GTX WORD PROCESSING 1//           word processing
DISPLAY TEXT: Order: //
REQUIRED: YES//
MULTIPLE VALUED:
ASK ON EDIT ONLY:
```

```
ASK ON ACTION:
HELP MESSAGE:
XECUTABLE HELP:
ASK ON CONDITION:
INPUT TRANSFORM:
DEFAULT WORD-PROCESSING TEXT:
Per: {FLD:O2 ORDER TYPES}
Flow: {FLD:GEN TEXT 3}/min
Type: {FLD:CONTINUOUS/PRN/NOCTURNAL}

  Edit? NO//
POST-SELECTION ACTION:
ENTRY ACTION:
EXIT ACTION:
ORDER TEXT SEQUENCE: 2//
FORMAT:
OMIT TEXT:
LEADING TEXT:
TRAILING TEXT:
START NEW LINE: YES//
WORD-WRAP: DON'T WRAP//

Select PROMPT:
Auto-accept this order? NO//

Do you want to test this dialog now? NO
```
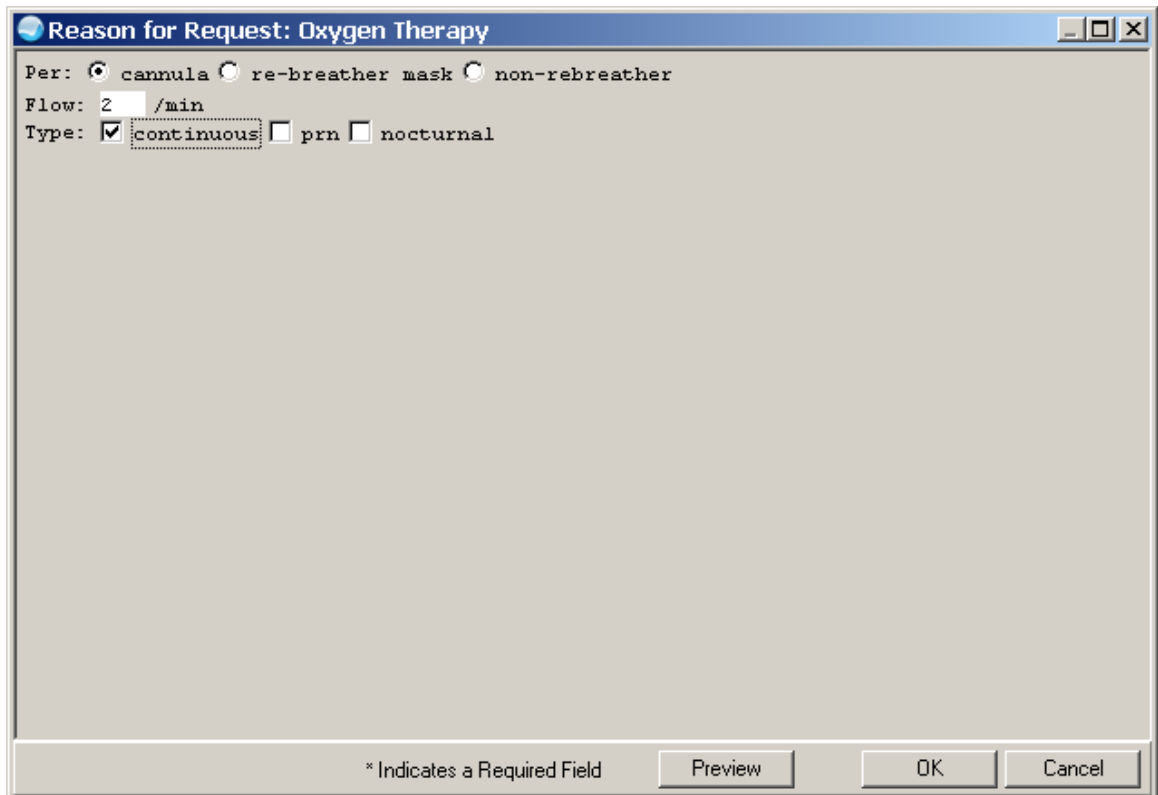

Figure 1-9: Template Popup First
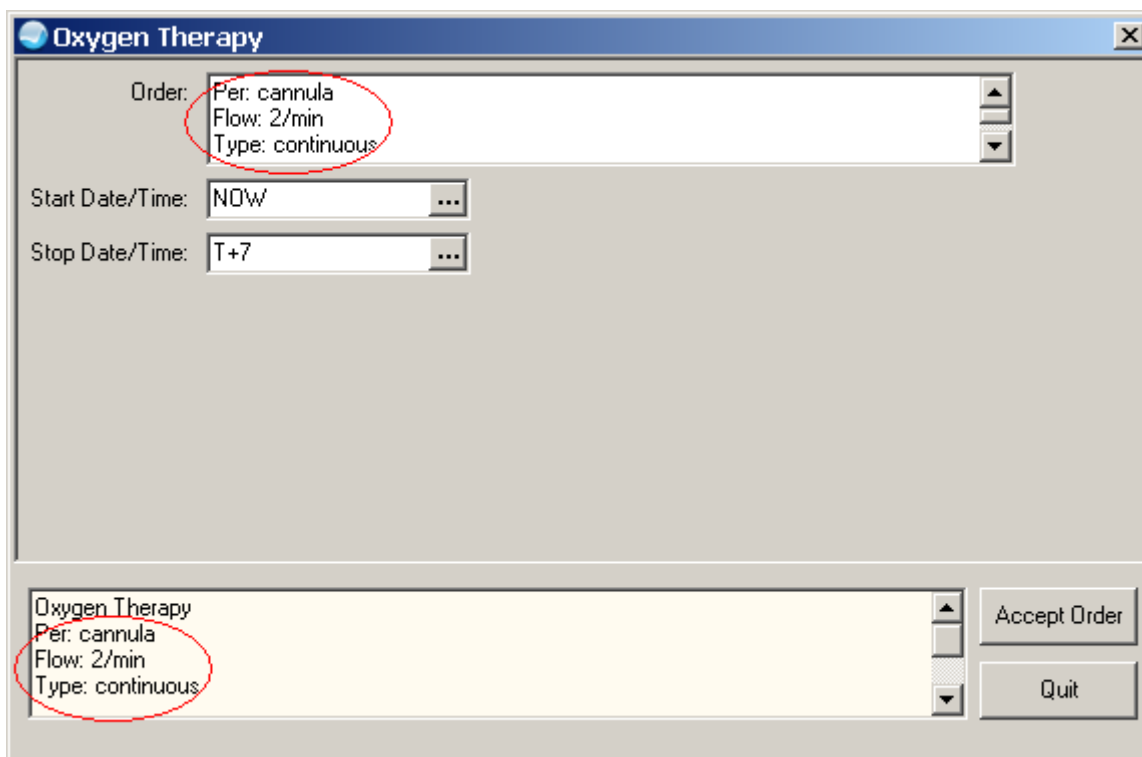
Figure 1-10: Text from the Template is Inserted into the Order

1.3 Menus vs. Order Sets

An order set is when you put several quick orders together.

The following shows the features of menus and sets.

Menus	Sets
Choose multiple items	Choose only one item
User can see what items are available	Only see items when ordering
Useful when not all items are always chosen	Saves steps
	Useful when every item must be used

1.4 Order Set

Order Sets are a way to combine individual quick orders to expedite the ordering process for the provider. When creating order sets, use namespace+ZSET.

Namespace	Department
RAZSET	Radiology
LRZSET	Lab
PSOZSET	Outpatient meds
PSJZSET	Inpatient (Unit dose) meds
PSJIVZSET	IV piggybacks
PSIVZSET	IV fluids and infusions
GMRCZSET	Consults
ORZSET	Mixed orders/nursing
FHZSET	Dietary

Refer to the CAC Guide for how to do Order Sets. Quick orders must exist before Order Sets can be created.

1.5   Admitting Orders and Disease Specific Orders

The following has information about putting Standing Orders into order menus and/or order sets.

The following shows an example of a "paper" version of Alcohol Dependence Standing Orders.

1	Admit to:
2	Dx:
3	Condition:
4	Allergies:
5	Vital signs: { } q 4H, or { } Other:
6	{ } Notify OD for Temp > 101, pulse >130, or < 60, SBP
	> 180 or < 100
7	Diet: { } Regular, or
8	Activity: { } ad lib, or { } Other:
9	Consult for teaching:
	Mental Health, Nutritionist, Social Work
10	{ } PPD placement if no previous documented reaction
11	Pneumovax
12	{ } Td 1 unit dose I.M. if not done within last 10 years.
13	LAB: { } CBC, { } CMP, { } Mg, { } PT,PTT, { } Urine drug screen
14	Medications:
	{ } MVI 1 tab PO q D
	{ } Folic acid 1 mg PO q D
	{ } Thiamine 100 mg PO q D x 3 days
	{ } Magnesium Sulfate 1 g IM q 8 H x 2 doses
	{ } Promethazine(Phenergen) 25 mg IM or PO q 6H prn nausea
	{ } Clonidine 0.1 mg PO BID
	{ } Metoprolol 25 mg PO q 6 hrs, hold pulse < 60 or SBP > 100
	{ } Chlordiazepoxide (Librium) 25-50 mg PO QID prn withdrawal signs
	SIGNATURE

Electronic Version of Alcohol Dependence Standing Orders

RPMS:

```
Menu: ORZM IP ALCOHOL WITHDRAWAL                        Column Width: 40
 1                                       2
|     Hold control button and left mouse     ADC   Admit to Inpatient
|     click to select multiple orders        V     Vital Signs
|                                                   Accuchek
|                                                   CIWA Scale
+                                            A     NEW Allergy / Adverse Reaction
|                                            N     Patient Care Nursing Orders...
|                                                   Fall Precautions
|                                                   Call Parameters...
|                                                   Call Security for Agit/Aggres Pt
1                                                   Nsg Incident Report for Abusive
|                                            D     Diet
|                                                   Diet Supplement
|                                            A     Alcohol Detox Activity Orders
|                                                   Activity: Pt may not leave unit
+                                                   Activity Orders...
|                                            L     CMP in AM
|                                                   GGT in AM
|                                                   Mg in AM
|                                                   PO4 in AM
2                                                   RPR in AM
|                                                   HIV in AM
|                                                   Blood Alcohol now
|                                                   CBC in AM
|                                                   Drug Screen Abuse 10
+                                                   Drug Screen Abuse 12 (opioids)
|                                                   AM Lab Orders...
|                                                   Immediate/Timed Lab Orders...
|                                            I     IV Fluids Menu...
|                                                   No IV Access at this time
3                                            S     Nutrition Consult
|                                                   Diabetes Education Consult
|                                                   Social Services Consult
|                                                   Other Consults...
|                                                   DNR
+                                                   Health Care Maintenance/Immun
|                                            M     Alcohol Withdrawal Medications
```

EHR:
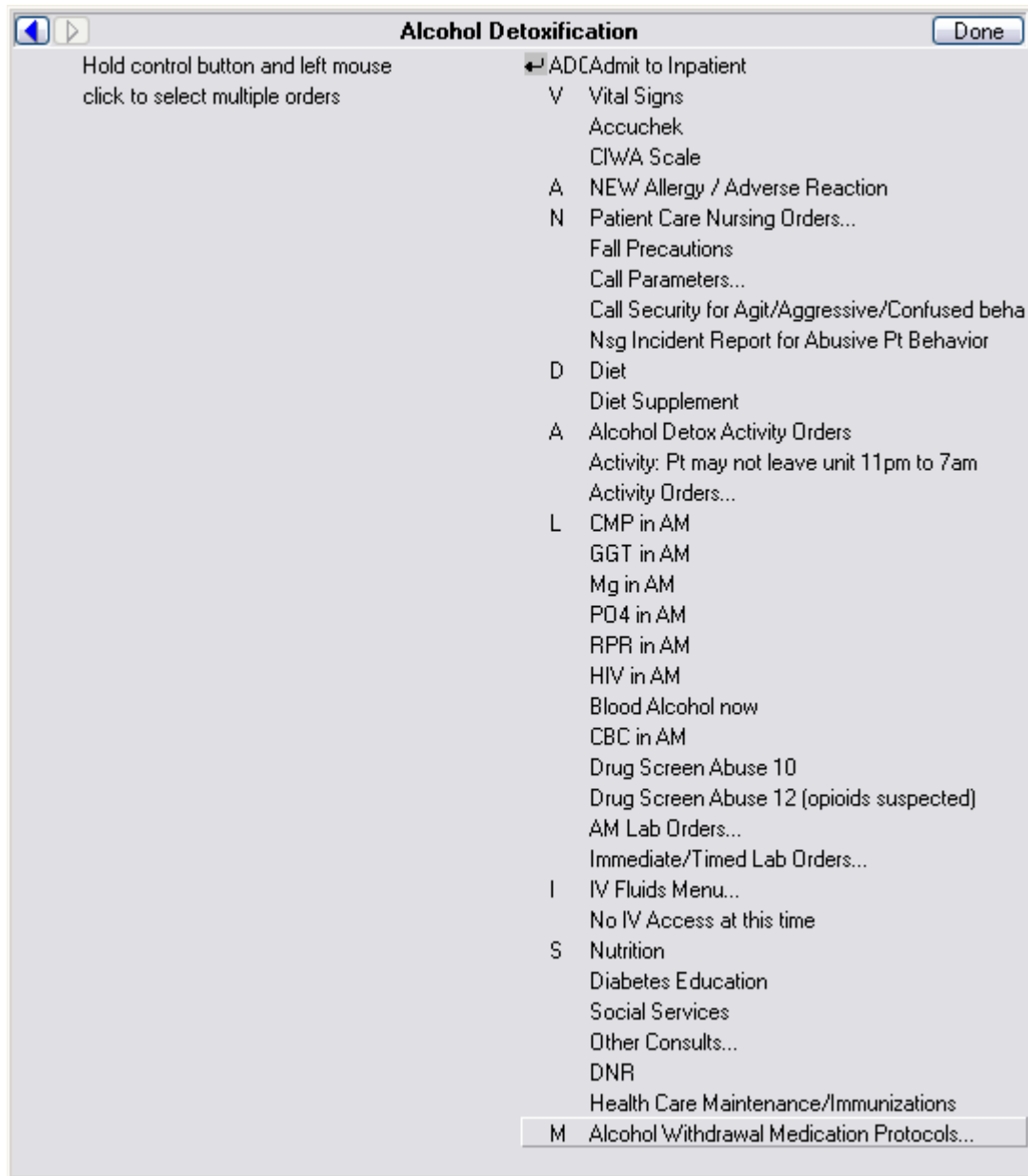
Figure 1-11: How Alcohol Detoxification Appears in EHR

Electronic Version of Admission Standing Orders:
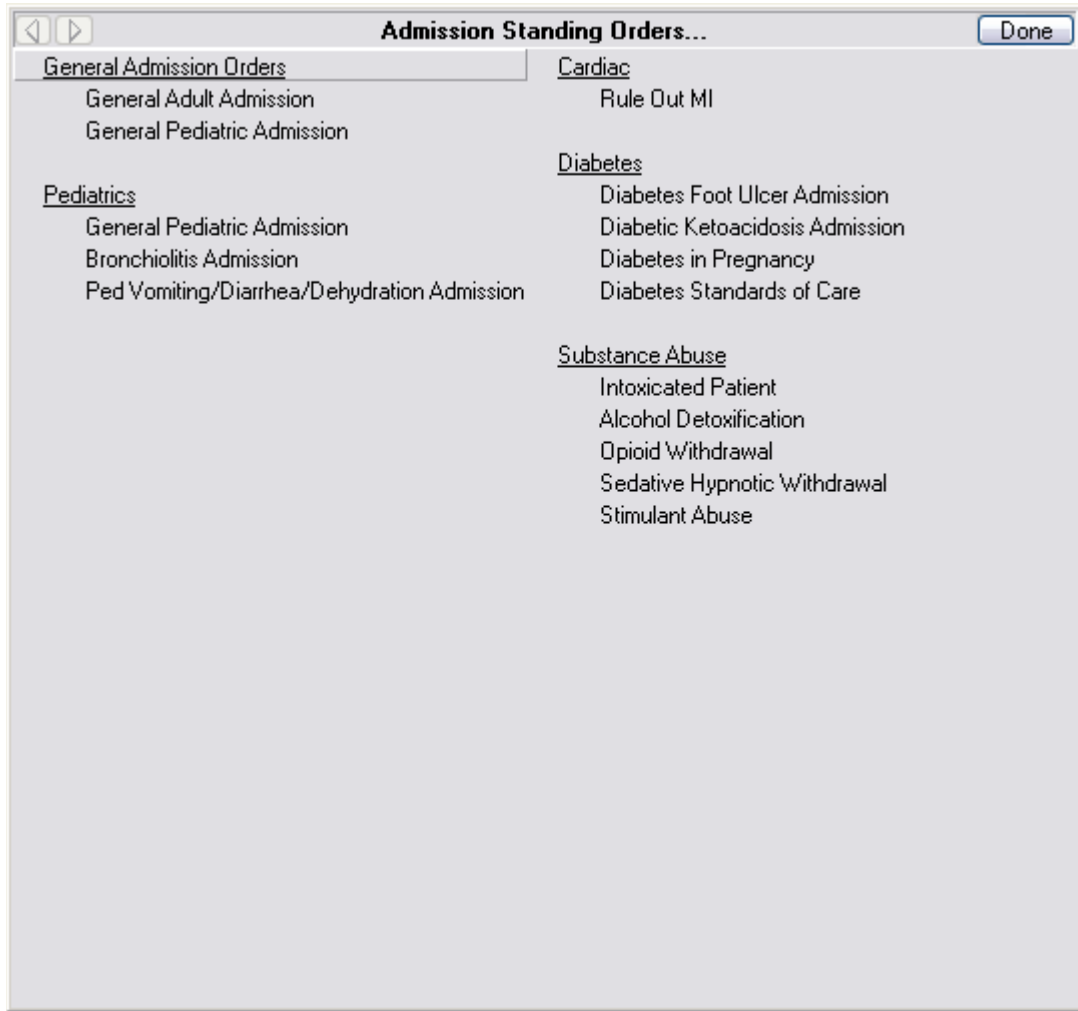
Figure 1-12: How Admission Standing Orders Appear in EHR

Electronic Version of General Adult Admission:
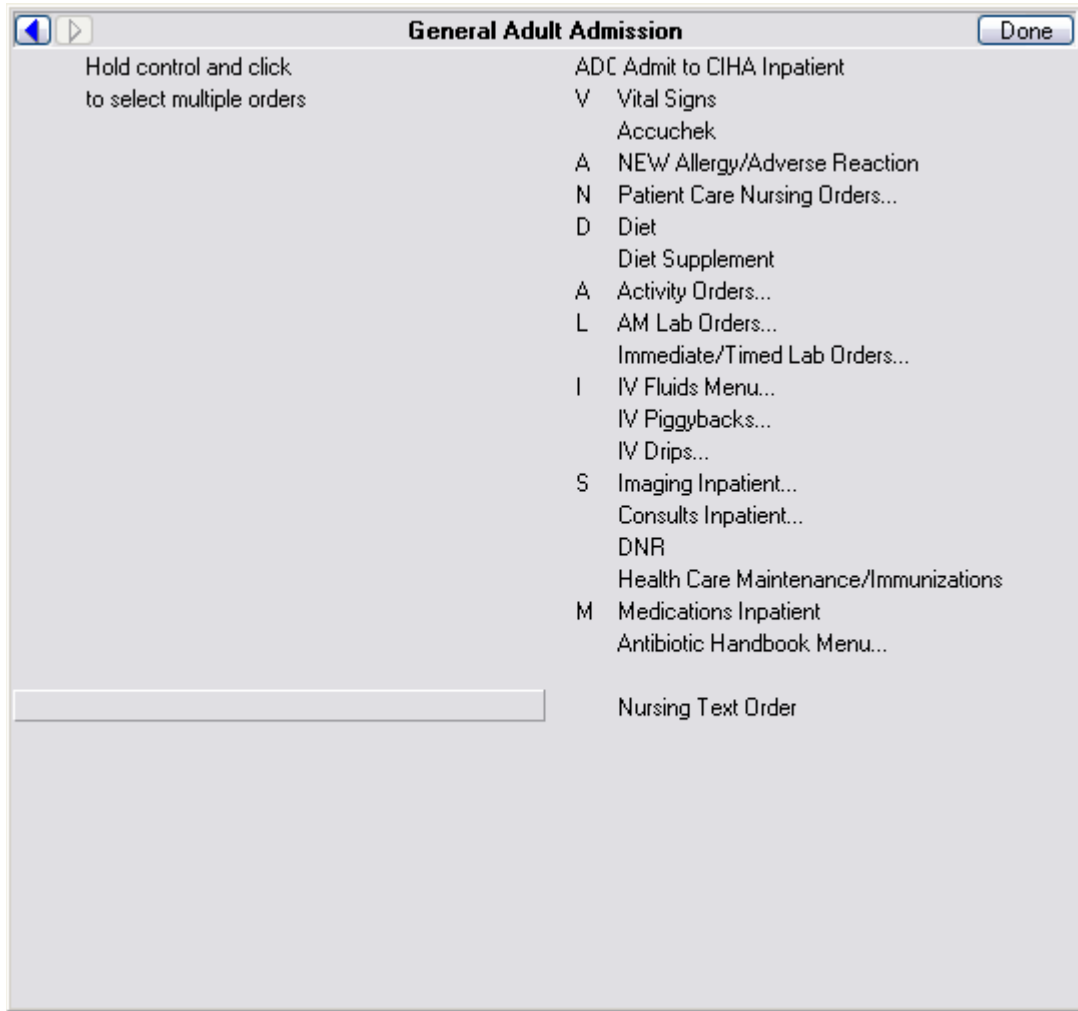
Figure 1-13: How General Adult Admission Appears in EHR

1.6   Create a New Menu

You create a new menu using the Create/Modify Order Menus (MNU) on the Order
Menu Management menu. Refer to the CAC Guide for how to create a new menu.

Namespace	Department
RAZM	Radiology
LRZM	Lab
PSOZM	Outpatient meds
PSJZM	Inpatient (Unit dose) meds
PSJIVZM	IV piggybacks
PSIVZM	IV fluids and infusions
GMRCZM	Consults
ORZM	Nursing/Patient Care
FHZM	Dietary

Use namespace+ZM = local menu

1.7   Quick Order Wizard

The Quick Order Wizard is found in Design Mode. This is a two-part process: create the quick order and then hang it on the menu, using RPMS.

Refer to the CAC Guide for more information.

2.0   Delayed Order Set Up

This section describes how to create, edit, and view a release event. Creating a release event allows EHR users to write event-delayed orders that are not executed until the release event occurs. For example, you could create a release event called "Admit to Med/Surg." A clinician could then write an order that would be delayed until the "Admit to Med/Surg" release event occurs (i.e., the patient is admitted). After the "Admit to Med/Surg" event occurs by the ADT process, the order would be released.

The Delayed Orders/Auto-DC Setup menu is in RPMS. To access this menu: go to the EHR Master Configuration Menu → ORD → DOC (Delayed Orders Configuration). The following menu will appear.

```
                    Delayed Orders/Auto-DC Setup

DOE    Delayed Orders/Auto-DC Setup
EDO    Enable Event-Delayed Orders
INQ    Inspect the OE/RR Patient Event File
PAR    Event-Delayed Order Parameters
REL    Release/Cancel Delayed Orders
```

2.1   Creating a Release Event

1. On the Delayed Orders/Auto-DC Setup menu, select DOE (Delayed Orders/Auto-DOC Setup). The following menu will appear:

```
Delayed Orders/Auto-DC Setup

   Select one of the following:
        1          Auto-DC Rules
        2          Release events

Enter response
```

2. Select 2 - Release Events. The existing release events will appear in a numbered list.

```
Release events                 Jan 17, 2008 10:24:11      Page:    0 of    0
Event set up and maintenance - All entries/Truncated view
   Event Name                               Display Text       Active?  Event












        Select number or enter action desired                              >>>
AE  Add/Edit            CC  Create Child Event    DD  Detailed Display
AI  Activate/Inactivate CD  Change display        EP  Edit Event Delay Params
Select action: Quit//
```

3. Select AE - Add/Edit. There is a table following this section that explain the prompts. The remaining prompts are:

```
Select OE/RR RELEASE EVENTS NAME:

                              ┌─────────────────────────────────────────────┐
                              │ This is free text. Example: Admit to Med/Surg. │
                              └─────────────────────────────────────────────┘

OE/RR RELEASE EVENTS TYPE OF EVENT:

                              ┌─────────────────────────────────────┐
                              │ The allowable items are admission,    │
                              │ transfer, discharge, O.R, manual release. │
                              └─────────────────────────────────────┘

OE/RR RELEASE EVENTS DIVISION:

                              ┌──────────────────────┐
                              │ Enter division name.  │
                              └──────────────────────┘

Do you want to copy from an existing entry? NO// <Enter>
NOTE: New entry start INACTIVATED.
YOU will not be allowed to ^ out until the required fields are entered.
NAME: ADMIT TO MED/SURG
DISPLAY TEXT: Admit to Med/Surg
TYPE OF EVENT: ADMISSION// <Enter>
ADMIT TO DIVISION: <division name>// <Enter>
MAS MOVEMENT TYPE: <Enter>
SELECT INCLUDED TREATING SPECIALTIES: (optional)
SELECT INCLUDED LOCATIONS: (this list is defined in ADT) (can be more than
one location)
SHORT NAME: (optional)
EVENT ORDER DIALOG: OR GXMOVE ADMIT PATIENT (need table of the selections)
ORDER SET/MENU: (this is where to place the standing admission orders menu)
LAPSE IN #DAYS: (after this number of days, the delayed orders will go to
lapsed status and no longer be valid)
ORDERING PARAMETERS LOCATION: (enter the inpatient unit name)
COPY ACTIVE ORDERS: (Use Y or N. Allows the user to copy active orders.)
Menu for Write Orders list by event may be set for the following: Location
SELECT HOSPITAL LOCATION NAME: Med/Surg
Select release event: ADMIT TO MED/SURG
Are you adding ADMIT TO MED/SURG as a new release event? YES// <Enter>
Release event: ADMIT TO MED/SURG// <Enter>
Value: <Enter>
Select release event: <Enter>
```

> **NOTE**: You must use the option "Activate/Inactivate" to make the new release event active.

Below is an example after delayed order setup has been completed.
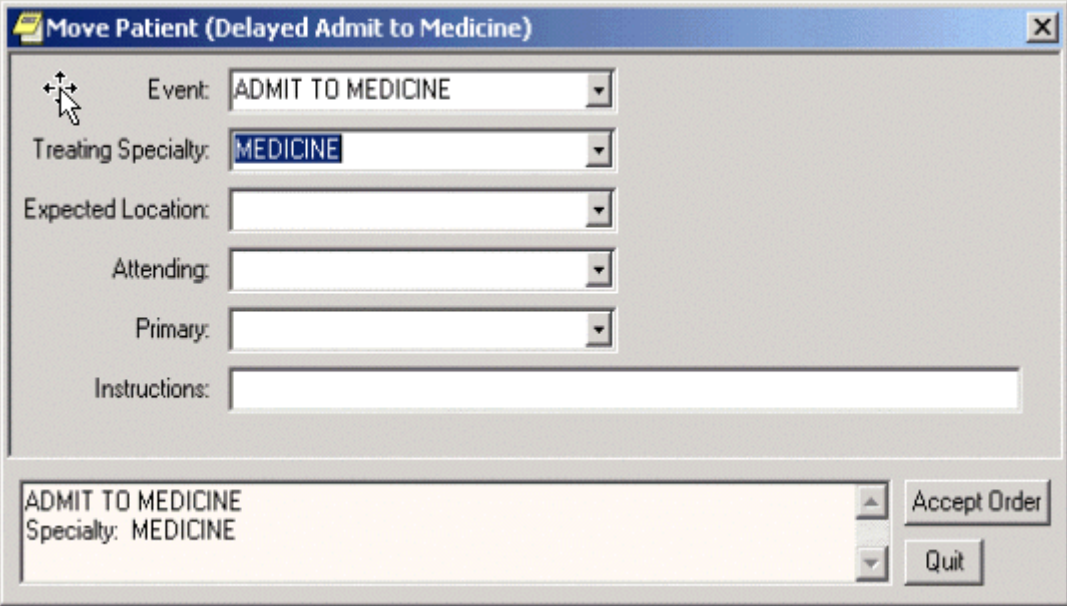
```
Release events                Feb 21, 2008 09:27:46         Page:    1 of    1
Event set up and maintenance - All entries/Truncated view
    Event Name                          Display Text       Active?   Event
1   ADMIT TO ICU                        Admit to ICU          Y        A
2   ADMIT TO MSU                        Admit to MSU          Y        A
3   ADMIT TO NURSERY                    Admit to Nursery      Y        A
4   ADMIT TO OB                         Admit to OB           Y        A
5   DISCHARGE FROM ICU                  Discharge from ICU    N        D
6   DISCHARGE FROM MSU                  Discharge From MSU    N        D
7   DISCHARGE FROM NURSERY              Discharge from Nurse  N        D
8   DISCHARGE FROM OB                   Discharge from OB     N        D
9   POST OP DAY SURGERY                 Post Op Day Surgery   N        M
10  POST-OP INPT SURGERY                Inpt post-op          N        M
11  PRE-OP DAY SURGERY                  Pre-op Day Surgery    N        M
```

```
12  PRE-OP INPT SURGERY                      Inpt Pre-op           N       M
13  TRANSFER TO ICU                          Transfer to ICU       Y       T
14  TRANSFER TO MSU                          Transfer to MSU       Y       T
15  TRANSFER TO OB                           Transfer to OB        Y       T
```

2.2   Explanation of Release Event Prompts

The list below explains the additional prompts (fields) that you might encounter when entering a new release event:

Prompt	Meaning
Display Text	The name of the release event as it appears to the EHR users.
Type of Event	The type of release event. The value of this field can be A (admission event), T (transfer event), D (discharge event), O (O.R. event), or M (manual release event).
Division	The division to which the release event will apply. • For admission events the division is the admitting location. • For discharge events the division is the location the patient is leaving. • For transfer events the division is the receiving location where the patient will be transferred. • For O.R. events the division is the location where the patient will have the procedure. • For manual release events the division is where the patient will be located.
MAS Movement Type	The MAS movement type that will trigger this release event. • For admission and discharge events it is recommended that this field be left blank unless you have a need for a very specific admission/discharge event. This way, any admission/discharge type will release delayed orders. • For O.R. events a MAS Movement type is not required.
Select Included Locations	The locations included in the release event.
Select Included Treating Specialties	The treating specialties included in the release event. • For O.R events a treating specialty is not required.
Short Name	A short name for the release event (used when space is limited on the Orders tab).
Event Order Dialog	The name of the dialog that appears when a user writes an event-delayed order assigned to the release event. • For admission events use ORZ GXMOVE EVENT or ADMIT PATIENT. • For discharge events use ORZ GXMOVE EVENT or DISCHARGE. • For transfer events use ORZ GXMOVE EVENT or TRANSFER.
Example is below:	

Prompt	Meaning
Move Patient (Delayed Admit to Medicine) dialog box. Event: ADMIT TO MEDICINE; Treating Specialty: MEDICINE; Expected Location: (blank); Attending: (blank); Primary: (blank); Instructions: (blank). Summary pane reads: ADMIT TO MEDICINE / Specialty: MEDICINE. Buttons: Accept Order, Quit.	
Order Set Menu	The order set/menu that will appear when a user writes an event-delayed order assigned to the release event. NOTE: Order sets listed in this field should be part of an order menu.
Lapse in # Days	The number of days that an event-delayed order assigned to the release event will remain active. Once the number of days specified is exceeded, you can no longer release orders assigned to this release event.
Ordering Parameters Location	The location that the release event will use to retrieve its ordering parameters. • For admission, transfer, O.R., and manual release events, be sure to specify a representative location so that the appropriate parameter values for dialogs (such as dietetics and lab) are used. • For discharge events it is recommended that you specify a representative location so that the appropriate parameter values for dialogs are used. However, this is not required because the patient will be leaving the facility.
Copy Active Orders	Indicates whether a user should be permitted to copy existing active orders to new event-delayed orders. • For admission and discharge events this field is usually set to no. • For transfer events this field is usually set to yes.

> **NOTE**: You can configure the OREVNT EXCLUDE DGRP parameter to prevent orders belonging to specific display groups from being copied. For more information, refer to Excluding Display Groups from the Copy Active Orders Dialog Box.

2.3   Sample Release Events

The following are sample release events.

```
Name:                        ADMIT TO ICU
Short name:                  admit icu
Inactivated:
Type of event:               ADMISSION
Admit to division:           FORT DEFIANCE INDIAN HOSPITAL
Event order dialog:          OR GXMOVE FD ADMIT PATIENT
Order set/menu:              ORZM INPATIENT ADMISSION TRANSFER
Lapse in #days:              2
Mas movement type:
Display text:                Admit to ICU
Ordering parameters location: ICU
Copy active orders:          NO


Included Locations:
ICU
```

```
Name:                        ADMIT TO MED/SURG
Short name:                  Admit MED/SURG
Inactivated:
Type of event:               ADMISSION
Admit to division:           FORT DEFIANCE INDIAN HOSPITAL
Event order dialog:          OR GXMOVE FD ADMIT PATIENT
Order set/menu:              ORZM INPATIENT ADMISSION TRANSFER
Lapse in #days:              14
Mas movement type:
Display text:                Admit to MED/SURG
Ordering parameters location: MED/SURG
Copy active orders:          NO


Included Locations:
MED/SURG
```

```
Name:                        DISCHARGE FROM ICU
Short name:                  D/C from ICU
Inactivated:                 NOV 08, 2007@08:33:09
Type of event:               DISCHARGE
Discharge from division:     FORT DEFIANCE INDIAN HOSPITAL
Event order dialog:          OR GXMOVE DISCHARGE
Order set/menu:              ORZM MAIN
Lapse in #days:              2
Mas movement type:
Display text:                Discharge from ICU
Ordering parameters location: ICU
Copy active orders:          NO
```

```
Name:                        TRANSFER TO ICU
Short name:                  Tfer to ICU
Inactivated:
Type of event:               TRANSFER
Trans to/within division:    FORT DEFIANCE INDIAN HOSPITAL
Event order dialog:          OR GXMOVE TRANSFER
Order set/menu:              ORZM INPATIENT ADMISSION TRANSFER
Lapse in #days:              2
```

```
Mas movement type:
Display text:               Transfer to ICU
Ordering parameters location: ICU
Copy active orders:         YES


Included Locations:
ICU
```

```
Name:                       TRANSFER TO MED/SURG
Short name:                 Transfer to MED/SURG
Inactivated:
Type of event:              TRANSFER
Trans to/within division:   FORT DEFIANCE INDIAN HOSPITAL
Event order dialog:         OR GXMOVE TRANSFER
Order set/menu:             ORZM INPATIENT ADMISSION TRANSFER
Lapse in #days:             2
Mas movement type:
Display text:               Transfer to MED/SURG
Ordering parameters location: MED/SURG
Copy active orders:         YES


Included Locations:
MED/SURG
```

2.4   Activating/Inactivating a Release Event

To activate/inactivate a release event, follow these steps:

4. In RPMS, go to the RPMS-EHR Configuration Master Menu. Then select ORD
    → DOC → DOE. Select 2 (Release Events).

5. You will be on the Release event window. Select AI (Activate/Inactivate).

6. Type the number of the release event you would like to activate/inactivate at the
    Select items prompt.

7. The computer will display a message asking if you are sure you want to
    activate/inactivate this release event. Type the appropriate response.

> **NOTE:** Once you have activated a release event, the event will
> appear on the Event Delayed Orders dialog in the EHR. Users can
> now write orders that are delayed until the release event occurs.

2.5   Detailed Display of a Release Event

The following shows how to view a detailed display and the audit and activation
history of a release event.

2.5.1   View a Detailed Display

To view a detailed display of a release event, follow these steps:

8. In RPMS, go to the RPMS-EHR Configuration Master Menu. Then select ORD
    → DOC → DOE. Select 2 (Release Events).

9. At the *Select item(s)* prompt, type the number of the release event that you would
    like to display. A detailed display of the release event will appear.

2.5.2   Audit and Activation History

The audit and activation histories on the detailed display can be toggled on or off
depending on your preferences.

To toggle the audit and activation histories on or off, follow these steps:

1. In RPMS, go to the RPMS-EHR Configuration Master Menu. Then select ORD
    → DOC → DOE. Select 2 (Release Events).

2. Select DD - Detailed Display.

3. At the *Select item(s)* prompt, type the number of the release event or auto-DC
    rule that you would like to display. A detailed display of the release event or
    auto-DC rule will appear.

4. Select HIS - Add/Remove Histories.

5. At the *Do you want to include them on the detailed display?* prompt, type **Y** to
    include the audit and activation histories on the detailed display. Type **N** if you
    do not wish to display the audit and activation histories.

2.6   Tracking Event-Delayed Orders

This is a trouble-shooting tool. You can use the information stored in the OE/RR
PATIENT EVENTS file (#100.2) to determine which orders were released as the
result of a release event. This option gives a Fileman inquiry of an event from the
patient event file. This file holds information related to orders placed on delay.
Included in this information are orders released and auto-DC due to an event
occurring as well as an audit trail of MAS actions taken related to this delayed event.

To retrieve information from the OE/RR PATIENT EVENTS file (#100.2), follow
these steps:

1. In RPMS, go to the RPMS-EHR Configuration Master Menu. Select ORD →
    DOC → INQ.

2. Enter either the name of the release event, the name of the patient, or the
    patient's health record number at the *Select OE/RR PATIENT EVENT* prompt.

    The records that match the criteria you specified will appear in a numbered list.

3. If necessary, type the number of the record you would like to view.

4. Choose the output device at the *DEVICE* prompt. The details of the record will be sent to the appropriate device. The record will show the "Inspect the OE/RR Patient Event File" information.

2.7   Creating a List of Commonly Used Release Events

The OREVNT COMMON LIST parameter allows a CAC to manage the list of commonly used release events that display. The process where the OE/RR event was created (in section 2.3) also adds the event to this list. This is seldom used.

To define a list of commonly used release events, follow these steps:

1. In RPMS, go to the RPMS-EHR Configuration Master Menu. Then select ORD → DOC → DOE. Select 2 (Release Events).

2. You will be on the Release events window. Select EP (Edit Event Params). You are asked to select one of the following:

```
1    Write orders list by event
2    Default release event
3    Common release event list
4    Manual release controlled by
5    Set manual release parameter
6    Exclude display groups from copy
```

3. Type **3** (Common release event list).

4. Choose how you would like to set the OREVNT COMMON LIST parameter by typing one of the following at the *Enter Selection* prompt:

    - **1** – for user level
    - **2** – for class level
    - **3** – for team level
    - **4** – for location level
    - **5** – for service level
    - **6** – for division level

5. If you selected 1, the Select *NEW PERSON NAME* prompt will appear.

    If you selected 2, the Select *USR CLASS* prompt will appear.

    If you select 3, the *Select OE/RR LIST NAME* prompt will appear.

    If you selected 4, the *Select HOSPITAL LOCATION NAME* prompt will appear.

    If you selected 5, the *Select SERVICE/SELECTION NAME* prompt will appear.

    If you select 6, the *Select INSTITUTION NAME* prompt will appear.

    Type the appropriate response.

6. At the *Select Entry Number* prompt, type a number for the entry. The number you enter is simply a placeholder and does **not** represent the position the release

event will occupy in the common list. Rather, the list of commonly used release events will be displayed in alphabetical order.

7. The number you entered in step 6 will be displayed. Verify that the number is correct and press **Return**.

8. Type the name of the release event you would like to add to the common list at the *RELEASE EVENT* prompt.

9. Repeat steps 6-8 if you would like to add additional release events to the list.

10. When you have finished adding release events to the list, press **Return** at the *RELEASE EVENT* prompt.

11. If you have not yet defined a default release event (set the OREVNT DEFAULT parameter), you will be prompted to do so.

> **NOTE:** A release event will only appear on the common list if it is context appropriate. For example, the release event "Transfer to Medicine" will not appear on the list if the current patient is an outpatient.

2.8 Defining a Default Release Event

The OREVNT DEFAULT parameter allows a CAC to control which event is presented as the default release event when a user writes a new event-delayed order (in both the EHR and RPMS). This is seldom used.

> **NOTE:** Before a default release event can be defined for a class, team, location, service, or division, you must define a list of commonly used release events for that level. (In other words, you must set the OREVNT DEFAULT LIST parameter.)

To define a default release event, follow these steps:

1. In RPMS, go to the RPMS-EHR Configuration Master Menu. Then select ORD → DOC → DOE. Select 2 (Release Events).

2. You will be on the Release event window. Select EP (Edit Event Params). You are asked to select one of the following:

```
1    Write orders list by event
2    Default release event
3    Common release event list
4    Manual release controlled by
5    Set manual release parameter
6    Exclude display groups from copy
```

3. Type **2** (Default release event).

4. Choose how you would like to set the OREVNT DEFAULT parameter by typing one of the following at the *Enter Selection* prompt:

    - 1 – for user level
    - 2 – for class level
    - 3 – for team level
    - 4 – for location level
    - 5 – for service level
    - 6 – for division level

5. If you selected 1, the Select *NEW PERSON NAME* prompt will appear.

    If you selected 2, the *Select USR CLASS* prompt will appear.

    If you select 3, the *Select OE/RR LIST NAME* prompt will appear.

    If you selected 4, the *Select HOSPITAL LOCATION NAME* prompt will appear.

    If you selected 5, the *Select SERVICE/SELECTION NAME* prompt will appear.

    If you select 6, the *Select INSTITUTION NAME* prompt will appear.

    Type the appropriate response.

    A list of available release events will appear. (If there are no release events, you will asked to create a common list first.)

```
OREVNT DEFAULT may be set for the following:
     1    User          USR    [choose from NEW PERSON]
     2    Class         CLS    [choose from USR CLASS]
     3    Team (OE/RR)  OTL    [choose from OE/RR LIST]
     4    Location      LOC    [choose from HOSPITAL LOCATION]
     5    Service       SRV    [choose from SERVICE/SECTION]
     6    Division      DIV    [choose from INSTITUTION]
```

    The OREVNT DEFAULT parameter can be set at the user, class, team, location, service, or division level.

6. Type the number of the release event that you would like to set as the default.

```
Enter selection: 2  Class    USR CLASS
Select USR CLASS NAME: INTERN PHYSICIAN

No DEFAULT has been set yet.

1) TRANSFER TO BLIND REHAB OBSERVATION (5000)
2) ADMIT TO SURGERY (5000)
3) POST OP (*INACTIVE*)

Select default release event:  (1-3): 1
```

    In this example, the Transfer to Blind Rehab Observation (5000) release event is set as the default event for the Intern Physician user class.

    > **NOTE:** When a user is writing an event-delayed order, the default release event will appear only if it is context appropriate. For example, the default release event "Transfer to Medicine" will not appear if the current patient is an outpatient.

The default release event, Transfer to Blind Rehab Observation (5000), is highlighted on the Release Orders dialog in the EHR.

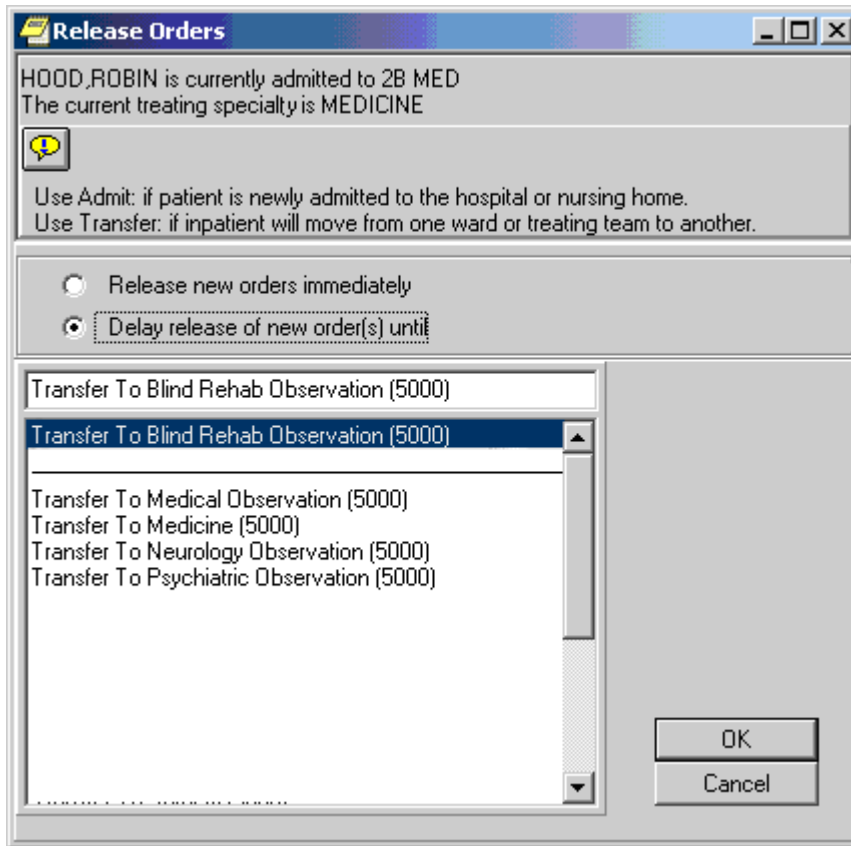*Figure 2-1: Sample Release Orders Dialog*

2.9   Editing the Orders Menu for a Release Event

You can edit which orders menu appears in the Write Orders pane for a particular release event. You can do this by setting the ORWDX WRITE ORDERS EVENT LIST parameter. The process where the OE/RR event was created (in section 2.3) also adds the order menu to this release event. This is seldom used.
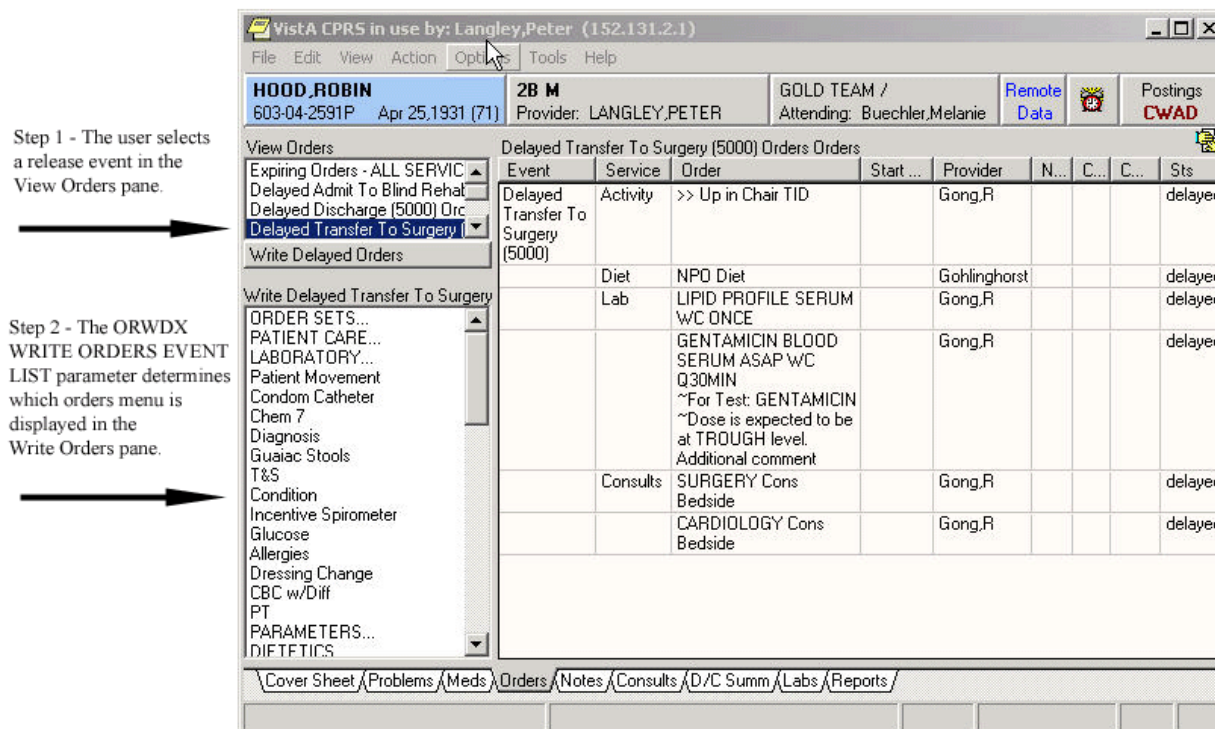
Figure 2-2: Steps for Release Event

The ORWDX WRITE ORDERS EVENT LIST parameter determines which orders menu appears in the Write Orders pane.

To set the ORWDX WRITE ORDERS EVENT LIST parameter, follow these steps:

1. In RPMS, go to the RPMS-EHR Configuration Master Menu. Then select ORD → DOC → DOE. Select 2 (Release Events).

2. You will be on the Release event window. Select EP (Edit Event Params). You are asked to select one of the following:

```
1    Write orders list by event
2    Default release event
3    Common release event list
4    Manual release controlled by
5    Set manual release parameter
6    Exclude display groups from copy
```

3. Type **1** (Write orders list by event).

4. Choose how you would like to edit the ORWDX WRITE ORDERS EVENT LIST parameter by typing one of the following at the *Enter Selection* prompt:

   - 2 – for user level
   - 4 – for location level
   - 5 – for service level
   - 7 – for division level

- 8 – for system level

5. If you selected 2, the *Select NEW PERSON NAME* prompt will appear.

    If you selected 4, the *Select HOSPITAL LOCATION NAME* prompt will appear.

    If you selected 5, the *Select SERVICE/SECTION NAME* prompt will appear.

    If you selected 7, the *Select INSTITUTION NAME* prompt will appear.

    Type the appropriate response.

    If you selected 8, skip to step 7.

6. At the *Select Release Event* prompt, type the name of the release event.

7. Enter Y or Yes at the *Are you adding [RELEASE EVENT NAME] as a new Release Event?* prompt.

8. The release event you entered in step 7 will appear. Verify that this is the correct release event and press Return**.**

9. Type the name of the order dialog or the display text at the `Value` prompt.

10. Repeat steps 6-9 for additional release events. When you are finished, press Return at the `Select Release Event` prompt.

2.10   Controlling Who Can Manually Release Orders

The OREVNT MANUAL RELEASE CONTROL and OREVNT MANUAL RELEASE parameters determine who can manually release an event-delayed order.

The OREVNT MANUAL RELEASE CONTROL parameter determines if the permission to manually release an event-delayed order is granted by one of the following:

- the ORES and ORELSE keys only
- the OREVNT MANUAL RELEASE parameter only
  (OREVNT MANUAL RELEASE parameter must be set)
- both keys and parameter
  (OREVNT MANUAL RELEASE parameter must be set)

To set the OREVENT MANUAL RELEASE CONTROL parameter, follow these steps:

1. In RPMS, go to the RPMS-EHR Configuration Master Menu. Then select ORD → DOC → DOE. Select 2 (Release Events).

2. You will be on the Release event window. Select EP (Edit Event Params). You are asked to select one of the following:

```
Select one of the following:
1          Write orders list by event
```

```
2          Default release event
3          Default release event list
4          Manual release controlled by
5          Set manual release parameter
6          Exclude display groups from copy
```

3. Type **4** (Manual release controlled by).

4. Choose how you would like to set the OREVNT MANUAL RELEASE
    CONTROL parameter by typing one of the following at the `Enter Selection`
    prompt:

    - 1 – for division level
    - 2 – for system level

5. If you selected 1, the `Select INSTITUTION NAME` prompt will appear. Type
    the appropriate response. If you selected 2, skip to step 6.

6. At the *Manual release controlled by* prompt, type one of the following
    responses:

    - **K (for Keys Only)**
       Use this setting if you would like only users who are assigned the ORES and
       ORELSE key to manually release event-delayed orders. This is the default
       setting.

    - **P (Manual Release Parameter Only)**
       Use this setting if you want the OREVNT MANUAL RELEASE parameter
       (discussed below) to control who can manually release an event-delayed
       order.

    - **B (Both Keys and Parameter)**
       If you choose this option, the EHR will first check to see if the user has the
       ORES or ORELSE key. If so, the user will be allowed to manually release an
       event-delayed order. If the user does not have the ORES or ORELSE key, the
       EHR will then check the OREVNT MANUAL RELEASE parameter to see if
       the user should be allowed to manually release the order.

    NOTE: If you select P or B, you will also need to set the
    OREVNT MANUAL RELEASE parameter by following the
    instructions below in the in the Setting the Manual Release
    Parameter section (Section 2.11).

2.11   Setting the Manual Release Parameter

NOTE: If the OREVNT MANUAL RELEASE CONTROL
parameter is set to either P or B, users will be unable to manually
release event-delayed orders until the OREVNT MANUAL
RELEASE parameter is set. (It is distributed with the system level
set to NO.)

To set the OREVNT MANUAL RELEASE parameter, follow these steps:

1. In RPMS, go to the RPMS-EHR Configuration Master Menu. Then select ORD → DOC → DOE. Select 2 (Release Events).

2. You will be on the Release event window. Select EP (Edit Event Params). You are asked to select one of the following:

```
Select one of the following:
1         Write orders list by event
2         Default release event
3         Default release event list
4         Manual release controlled by
5         Set manual release parameter
6         Exclude display groups from copy
```

3. Type **5** (Set manual release parameter). The following prompts appear:

4. Choose how you would like to edit the manual release parameter (OREVNT MANUAL RELEASE) by typing one of the following at the `Enter Selection` prompt:

    -   1 – for user level
    -   2 – for class level
    -   3 – for team level
    -   4 – for location level
    -   5 – for service level
    -   6 – for division level
    -   7 – for system level

5. If you selected 1, the *Select NEW PERSON NAME* prompt will appear.

    If you selected 2, the *Select USR CLASS NAME* prompt will appear.

    If you selected 3, the *Select OE/RR LIST NAME* prompt will appear.

    If you selected 4, the *Select HOSPITAL LOCATION NAME* prompt will appear.

    If you selected 5, the *Select SERVICE/SECTION NAME* prompt will appear.

    If you selected 6, the *Select INSTITUTION NAME* prompt will appear.

    Type the appropriate response.

    If you selected 7, skip to step 6.

6. At the *Allow manual release* prompt, type **Y** (yes) to allow users to manually release event-delayed orders or type **N** (no) to prevent users from manually releasing event-delayed orders.

2.12   Excluding Display Groups from the Copy Active Orders Dialog Box

The OREVNT EXCLUDE DGRP parameter allows you to prevent orders that belong to certain display groups from appearing on the *Copy Active Orders* dialog box. This is seldom used.

To set the OREVNT EXCLUDE DGRP parameter, follow these steps:

1. In RPMS, go to the RPMS-EHR Configuration Master Menu. Then select ORD → DOC → DOE. Select 2 (Release Events).

2. You will be on the Release event window. Select EP (Edit Event Params). You are asked to select one of the following:

```
Select one of the following:
1        Write orders list by event
2        Default release event
3        Default release event list
4        Manual release controlled by
5        Set manual release parameter
6        Exclude display groups from copy
```

3. Type **6** (Exclude display groups from copy).

4. Choose how you would like to edit the OREVNT EXCLUDE RELEASE parameter by typing one of the following at the `Enter Selection` prompt:

    *   1 – for division level
    *   2 – for system level

5. If you selected 1, the *Select INSTITUTION NAME* prompt will appear; enter the name for the institution. If you selected 2, continue to step 6.

6. At the *Select Entry Number* prompt, type a number for the entry. The number you enter is simply a placeholder.

7. If necessary, type **Y** or **Yes** at the *Are you adding [number] as a new Entry Number?* prompt.

8. The number you entered in step 6 will appear. Press **Return**.

9. Select the orders display group that you want to exclude from the *Copy Active Orders* dialog.

2.13   Changing the Display

The change display function allows you to adjust the size of the Delayed Orders / Auto-DC Set-up editor and to configure the display to show active entries, inactive entries, or all entries. This is seldom used.

To change the size or content of the display, follow these steps:

1. In RPMS, go to the RPMS-EHR Configuration Master Menu. Then select ORD → DOC → DOE. Select 2 (Release Events).

2. You will be on the Release event window. Select CD (Change display).

3. Type **Y** or **N** at the *Do you want to truncate/expand this display?* prompt.

4. Type **Y** or **N** at the *Terminal emulator in 80-column mode?* prompt.

5. At the *Select which entries should appear on the list* prompt type one of the following numbers:

   - **1** for active entries only
   - **2** for inactive entries only
   - **3** for all entries

   The orders that you specified will be displayed.

2.14 Files Associated with Release Events

The OE/RR RELEASE EVENTS (#100.5) file is associated with Release Events. This file contains the locally-defined events that can release delayed orders within each division. **We strongly recommend that this file not be edited with File Manager**. Instead, CACs should use the Delayed Orders Configuration menu. [BEHOORDO MAIN].

Fields in OE/RR RELEASE EVENTS (#100.5)		
Field Number	**Field Name**	**Description**
.1	SHORT NAME	This field contains a shorter version of the Display Text field. The Short Name is used to display and group delayed orders on the Orders tab when space is limited.
1	INACTIVATED	This field contains the date and time that this release event will become inactive. Once this date/time has passed, you will no longer be able to delay new orders to this release event. However, any event-delayed orders that are already associated with this release event will still be released when the event occurs.
,1.5	ACTIVATION HISTORY	The activation events.
100.52, .01	ACTIVATION DATE/TIME	The date/time that this event was activated.
100.52 ,1	INACTIVATION DATE/TIME	The date/time that this event was inactivated.

Fields in OE/RR RELEASE EVENTS (#100.5)		
Field Number	Field Name	Description
2	TYPE OF EVENT	This is the event that should cause delayed orders to be released to the service(s) for action. For OR events, the orders will be released when the TIME PAT OUT OF OR field is entered in the Surgery package. Orders delayed for Manual Release will not be automatically released by CPRS at all and can only be released via the "Release to Service" action by a user holding the ORES or ORELSE key.
3	DIVISION	This is the division that this event will apply to. For transfers across divisions, this field should be the new division that the patient is going to.
4	EVENT ORDER DIALOG	This field contains the name of the dialog that will appear when you are writing a generic event-delayed order that requests this release event. If such an order is not necessary for this event, leave this field empty. Unlike other delayed orders, the order created by this dialog will become active right away when signed and be visible on the Active Orders view as well as with the delayed orders on the Orders tab.
5	ORDER SET/MENU	This is a menu or order set containing items that are either necessary or commonly ordered when this event occurs. The menu or order specified in this field will be invoked when first placing delayed orders for this event. If an EVENT ORDER DIALOG was defined for this event, this order set/menu will be presented to the user immediately following that dialog. This field can be any type of order dialog except prompt types. Note: Order sets listed in this field should be part of an order menu.
6	LAPSE IN #DAYS	Patient events are evaluated whenever delayed orders are acted upon or viewed. If the number of days specified in this field have passed since delayed orders were entered for this event and for this patient, then the status of all orders delayed for this event will be changed to "lapsed" and the patient event itself will be terminated. The orders can no longer be released to the service.
7	MAS MOVEMENT TYPE	This is an MAS Movement Type that can further define this event. This field is optional, but if it is defined then it must match the patient's movement data to satisfy the event and cause any delayed orders to be released. For example, to have delayed orders released when a patient returns from pass, enter the movement type of AUTH ABSENCE 96 HOURS OR LESS, or leave this field empty to have the transfer event defined by other criteria such as treating specialty or ward location.
8	DISPLAY TEXT	This field is the name of the event as it will appear to the user in the EHR.

Fields in OE/RR RELEASE EVENTS (#100.5)		
Field Number	**Field Name**	**Description**
9	ORDERING PARAMETERS LOCATION	Many order dialogs use parameters that depend on location. The location specified in the Ordering Parameters Location field is used as the default location for retrieving those parameter values when delaying orders to this event. The patient's actual location will be saved with the order at the time of its release.
10	INCLUDED TREATING SPECIALTIES	The treating specialties in this field are the treating specialties that can satisfy this event. If the patient's new specialty matches a specialty in this field, then orders delayed for this event can be released.
100.51,.01	INCLUDED TREATING SPECIALTIES	This is a treating specialty that can satisfy this event. If the treating specialty is defined, then the patient's new specialty must match one in this list in order for any delayed orders to be released. A specialty can only be included in one active release event at a time. If locations are also defined for this event then both the treating specialty and the location must match for orders to be released.
11	INCLUDED LOCATIONS	These are ward locations that can satisfy this event. If the patient's new location matches a location in this list, then orders delayed for this event can be released
100.511,.01	INCLUDED LOCATIONS	This is a ward location that can satisfy this event. If defined, then the patient's new location must match a location in this list for any delayed orders to be released. A location can only be included in one active release event at a time. If this event also has treating specialties defined, then both the location and the treating specialty must match for orders to be released.
12	EDIT HISTORY	
100.512,.01	EDIT HISTORY	This field tracks when an event was added. It also tracks when the edit options were used on this event.
100.512,1	WHO ENTERED/EDITED	This field identifies the person who entered or edited the release event.
13	COPY ACTIVE ORDERS	This field determines whether or not the user is presented with a list of patient's active orders, which can be copied to the new release event. If this field is set to no then the user will not see the patient's active orders and will not be allowed to copy any current orders. If this field is set to yes then the user will see the patient's active orders and can select orders to copy to the to the release event. The list of active orders will be presented to the user after the ORDER DIALOG for the release event is processed (if it exists) and before the ORDER SET/MENU for the release event is processed (if it exists).

3.0   Auto Discontinue

Auto discontinue events/rules are pre-installed but inactive. The events/rules need to be reviewed and edited prior to activating.

Events that need to be edited are: admission, ward transfer, specialty change, and discharge.

You will be using the Delayed Orders/Auto-DC Setup menu in the RPMS. To access this menu, do the following: go to the RPMS-EHR Configuration Master Menu. Then select ORD → DOC (Delayed Orders Configuration). The following menu will appear:

```
                    Delayed Orders/Auto-DC Setup

DOE    Delayed Orders/Auto-DC Setup
EDO    Enable Event-Delayed Orders
INQ    Inspect the OE/RR Patient Event File
PAR    Event-Delayed Order Parameters
REL    Release/Cancel Delayed Orders
```

3.1   Editing an Auto-DC Rule

You must inactivate a rule before editing it; use the AI function and follow the prompts. To edit an auto-DC rule, follow these steps:

1. On the Delayed Orders/Auto-DC Setup menu, type **DOE** (Delayed Orders/Auto-DOC Setup) at the *Select Delayed Orders Configuration Option* prompt. The following options will appear:

```
    Select one of the following:
         1         Auto-DC Rules
         2         Release events

Enter response:
```

2. Type **1** at the *Enter Response* prompt. The existing auto-DC rules will appear on the Auto-DC events/rules window.

```
Auto-DC events/rules           Jan 17, 2008 14:05:31        Page:    1 of    1
Auto-DC set up and maintenance - All entries/Truncated view
     Event Name                            Display Text        Active?   Event
1  ADMISSION                               ADMISSION              N        A
2  DEATH                                   DEATH                  Y        D
3  DISCHARGE                               DISCHARGE              Y        D
4  FROM ASIH                               FROM ASIH              N        T
5  FROM PASS                               FROM PASS              N        T
6  ON PASS                                 ON PASS                N        T
7  SPECIALTY CHANGE                        SPECIALTY CHANGE       Y        S
8  SURGERY                                 SURGERY                N        O
9  TO ASIH                                 TO ASIH                N        T
10 WARD TRANSFER                           WARD TRANSFER          N        T
```

```
              Select number or enter action desired                  >>>
AE  Add/Edit              CD  Change display
AI  Activate/Inactivate   DD  Detailed Display
Select Action: QUIT//
```

3. Type **AE** (Add/Edit) at the *Select Action* prompt.

4. Type the number of the rule that you wish to edit at the *Select item(s)* prompt.

5. The content of each of the rule's fields will be displayed. You can either change the contents of the field, or press Return to advance to the next field. Press ^ to exit.

> **NOTE**: You can also add or release an existing auto-DC rule from the detailed display screen.

Below is an example of editing the ADMISSION item:

```
NAME: ADMISSION//
DISPLAY TEXT: ADMISSION//
TYPE OF EVENT: ADMISSION//
ADMIT TO DIVISION: DEMO HOSPITAL//
Select MAS MOVEMENT TYPE: OPT-SC// ??

    Choose from:
    AMBULATORY CARE (OPT-AC)
    DIRECT
    NON-SERVICE CONNECTED (OPT-NSC)
    NON-VETERAN (OPT-NVE)
    OPT-SC
    PRE-BED CARE (OPT-PBC)
    READMISSION TO NHCU/DOMICILIARY
    TRANSFER IN
    WAITING LIST

        You may enter a new MAS MOVEMENT TYPES, if you wish
        Movement Type(s) more completely define the trigger event for this rule,
        to allow for different rules on various types of MAS events.  For
        example, to define a rule for cancelling orders when a patient dies
        enter the movement types DEATH and DEATH WITH AUTOPSY; a movement type
        may only be used in one active rule, so omit these types when creating
        other Discharge rules.


    Choose from:
    8           AMBULATORY CARE (OPT-AC)
    9           TRANSFER IN
    15          DIRECT
    18          READMISSION TO NHCU/DOMICILIARY
    28          NON-SERVICE CONNECTED (OPT-NSC)
    29          PRE-BED CARE (OPT-PBC)
    30          NON-VETERAN (OPT-NVE)
    36          WAITING LIST
    39          OPT-SC
    40          TO ASIH
```

```
Select MAS MOVEMENT TYPE: OPT-SC// 15  DIRECT
         ...OK? Yes//   (Yes)

  MAS MOVEMENT TYPE: DIRECT//
Select MAS MOVEMENT TYPE: 9    TRANSFER IN
         ...OK? Yes//   (Yes)

  MAS MOVEMENT TYPE: TRANSFER IN//
Select MAS MOVEMENT TYPE:
DC REASON: Admit//
Select TYPE OF ORDERS TO DC: INPATIENT MEDICATIONS
        // ??

   Choose from:
   INPATIENT MEDICATIONS
   ORDER ENTRY/RESULTS REPORTING

        You may enter a new INCLUDED PACKAGES, if you wish
        This is a package whose active orders are to be automatically
        discontinued when the conditions of this rule are satisfied.


   Choose from:
   CONSULT/REQUEST TRACKING        GMRC
   DIETETICS        FH
   INPATIENT MEDICATIONS        PSJ
   IV MEDICATIONS        PSIV
   LAB SERVICE        LR
   ORDER ENTRY/RESULTS REPORTING        OR
   OUTPATIENT PHARMACY        PSO
   RADIOLOGY/NUCLEAR MEDICINE        RA

Select TYPE OF ORDERS TO DC: INPATIENT MEDICATIONS
        // pso  OUTPATIENT PHARMACY     PSO
  Are you adding 'OUTPATIENT PHARMACY' as
    a new INCLUDED PACKAGES (the 3RD for this OE/RR AUTO-DC RULES)? No// y
  (Yes)
Select TYPE OF ORDERS TO DC:
Select EXCEPT ORDERS IN DISPLAY GROUP: ??
        You may enter a new EXCLUDED DISPLAY GROUP, if you wish

        Any order related to the display group entered in the excluded
        display group multiple will be exempt from any
        auto-discontinuing normally triggered by this rule.

        You can use the excluded display group to protect a group of
        orders from being auto-discontinued.  If an order belonging to
        this display group is found while processing this rule it will
        be skipped and not be auto-discontinued.


   Choose from:
   ACTIVITY
   ALL SERVICES
   ALLERGIES
   ANATOMIC PATHOLOGY
   ANGIO/NEURO/INTERVENTIONAL
   AUTOPSY
   BLOOD BANK
   CARDIOLOGY STUDIES (NUC MED)
   CHEMISTRY
   CONDITION
```

```
   CONSULTS
   CT SCAN
   CYTOLOGY
   DIAGNOSIS
   DIET ADDITIONAL ORDERS
   DIET ORDERS
   DIETETIC CONSULTS
   DIETETICS
   EARLY/LATE TRAYS
              ^
Select EXCEPT ORDERS IN DISPLAY GROUP:
Select EXCEPT FOR ORDERABLE ITEM:
```

3.2   Explanation of Auto-DC Rules Prompts

The list below explains the additional prompts (fields) that you may encounter when entering a new auto-DC rule:

Prompt	Meaning
Display Text	The name of the release event as it appears to the EHR users.
Division	The division to which the auto-DC rule will apply. For admission events the division is the admitting location. For discharge events the division is the location the patient is discharged from. For transfer and specialty transfer events, the division reflects the receiving location. For O.R. rules, the division reflects the location where the patient is having the procedure.
DC Reason	The reason that this auto-DC rule will discontinue an order.
Excluded Display Groups	The groups of orders (often subsets of the included packages) that are exceptions to this rule (should not cause the order to be discontinued).
Excluded Treating Specialties	The specific sending and receiving specialties that are exceptions to the rule (should not cause an order to be discontinued). This prompt (field) is specific to specialty transfer events.
Except an Orderable Item	An orderable item that is an exception to the rule (should not cause an order to be discontinued)
Except from Observation	The field indicates whether a patient leaving an observation treating specialty should be an exception to this rule. This field is only used in discharge rules. This field can be set in the following ways: Yes – if you set the field to yes, a discharge from an observation treating specialty will always be an exception to this rule (should not cause an order to be discontinued). No – if you set this field to no, this rule will be applied regardless of whether the patient is discharged from an observation treating specialty. If Readmitting – If you set this field to If Readmitting, the user will be prompted to enter whether the patient will be immediately readmitted. If the user answers yes, the order will not be automatically discontinued. If the user answers no, the rule will be applied.
Inactivated	After the date/time listed in this field, the rule will no longer be applied.

Prompt	Meaning
Included Divisions	For multidivisional sites, the specific sending divisions that are included in this rule.
Included Locations	The specific sending and receiving wards that the auto-DC rule will apply to. This prompt (field) is only used with transfer events (no specialty change).
MAS Movement Type	The MAS movement type that will trigger the auto-DC rule. For a specialty transfer rule, the only movement type allowed is "Provider Specialty Change". However, any transfer that includes a specialty change will trigger this rule, even if another movement type is entered..
Type of Event	The type of event that will trigger the auto-DC rule. The value of this field can be A (admission event), T (transfer event), D (discharge event), S (specialty transfer event), or O (O.R event).
Type of Orders to DC	Orders generated by the RPMS package specified in this field will be discontinued.

3.3   Detailed Display of Rules/Events

You can also edit Rules/Events using DD (Detailed Display). Below is an example of editing a Ward Transfer.

```
Auto-DC events/rules          Feb 20, 2008 13:53:38        Page:    1 of    1
Auto-DC set up and maintenance - All entries/Truncated view
    Event Name                            Display Text         Active?   Event
1   ADMISSION                             ADMISSION               N        A
2   DEATH                                 DEATH                   Y        D
3   DISCHARGE                             DISCHARGE               Y        D
4   FROM ASIH                             FROM ASIH               N        T
5   FROM PASS                             FROM PASS               N        T
6   ON PASS                               ON PASS                 N        T
7   SPECIALTY CHANGE                      SPECIALTY CHANGE        N        S
8   SURGERY                               SURGERY                 N        O
9   TO ASIH                               TO ASIH                 N        T
10  TO CLINIC                             TO Clinic               N        T
11  WARD TRANSFER                         WARD TRANSFER           N        T




          Select number or enter action desired                          >>>
AI  Activate/Inactivate   DD  Detailed Display
Select action: Quit// dd   Detailed Display
Select item(s): 11


 Detailed Display              Feb 20, 2008 13:53:44        Page:    1 of    1
Name:                    WARD TRANSFER
Inactivated:             NOV 11, 2004@11:01:07
Type of event:           TRANSFER
Trans to/within division:    DEMO HOSPITAL
Dc reason:               Transfer
Display text:            WARD TRANSFER

Movement Types:
INTERWARD TRANSFER
```

```
Included Packages:
ORDER ENTRY/RESULTS REPORTING
IV MEDICATIONS
INPATIENT MEDICATIONS

Including From Locations:              To Locations:
* (All Locations)                      * (All Locations)
ICU                                    ICU


             Enter ?? for more actions                                >>>
AE   Add/Edit           AI   Activate/Inactivate  HIS  Add/Remove Histories
Select Item(s): Quit// AE   Add/Edit


Editing auto-dc rules takes effect immediately.

NAME: WARD TRANSFER//
DISPLAY TEXT: WARD TRANSFER//
TYPE OF EVENT: TRANSFER//
TRANSFER TO/WITHIN DIVISION: DEMO HOSPITAL//
Select MAS MOVEMENT TYPE: INTERWARD TRANSFER//
DC REASON: Transfer//
Select INCLUDED LOCATIONS ID: GENERAL// ???
    Answer with INCLUDED LOCATIONS INCLUDED LOCATIONS ID

  Choose from:
  GENERAL
  ICU

       You may enter a new INCLUDED LOCATIONS, if you wish
       Enter an ID (free text) that will represent an entry in the
       FROM - TO location matrix.  The value of the ID field is
       insignificant as it simply represents a place holder.  You
       can use any naming or numbering convention that you want.

       Orders will not auto-dc for location (ward) type transfers
       unless the transfer from and transfer to locations are
       identified within the INCLUDED LOCATIONS from - to entries.
       If the transfer from and to locations are found in this
       multiple then orders will auto-dc.

Select INCLUDED LOCATIONS ID: GENERAL//
  INCLUDED LOCATIONS ID: GENERAL//
  FROM ALL LOCATIONS: NO//
  FROM LOCATION: ICU//
  TO ALL LOCATIONS: NO//
  TO LOCATION: ICU//
Select INCLUDED LOCATIONS ID:
Select FROM DIVISION: ??
       You may enter a new INCLUDED DIVISIONS, if you wish
       This is a division that will cause this rule to be applied; if no
       specialty change occurs with the transfer, then the patient must be
       moving from this division for active orders to be discontinued.

Select TYPE OF ORDERS TO DC: INPATIENT MEDICATIONS
        //
Select EXCEPT ORDERS IN DISPLAY GROUP: LAB  LABORATORY
  Are you adding 'LABORATORY' as
    a new EXCLUDED DISPLAY GROUP (the 1ST for this OE/RR AUTO-DC RULES)? No// Y
  (Yes)
Select EXCEPT ORDERS IN DISPLAY GROUP: RAD  GENERAL RADIOLOGY
```

```
   Are you adding 'GENERAL RADIOLOGY' as
     a new EXCLUDED DISPLAY GROUP (the 2ND for this OE/RR AUTO-DC RULES)? No// Y
   (Yes)
Select EXCEPT ORDERS IN DISPLAY GROUP:
Select EXCEPT FOR ORDERABLE ITEM:


 Detailed Display              Feb 20, 2008 13:55:43        Page:   1 of   2
Name:                         WARD TRANSFER
Inactivated:                  NOV 11, 2004@11:01:07
Type of event:                TRANSFER
Trans to/within division:     DEMO HOSPITAL
Dc reason:                    Transfer
Display text:                 WARD TRANSFER

Movement Types:
INTERWARD TRANSFER

Included Packages:
ORDER ENTRY/RESULTS REPORTING
IV MEDICATIONS
INPATIENT MEDICATIONS

Excluded Display Groups:
LABORATORY
GENERAL RADIOLOGY

Including From Locations:            To Locations:
+           Enter ?? for more actions                                   >>>
AE   Add/Edit            AI   Activate/Inactivate  HIS  Add/Remove Histories
Select Item(s): Next Screen//
```

3.4   Sample of Auto-DC Rules

This section provides sample rules.
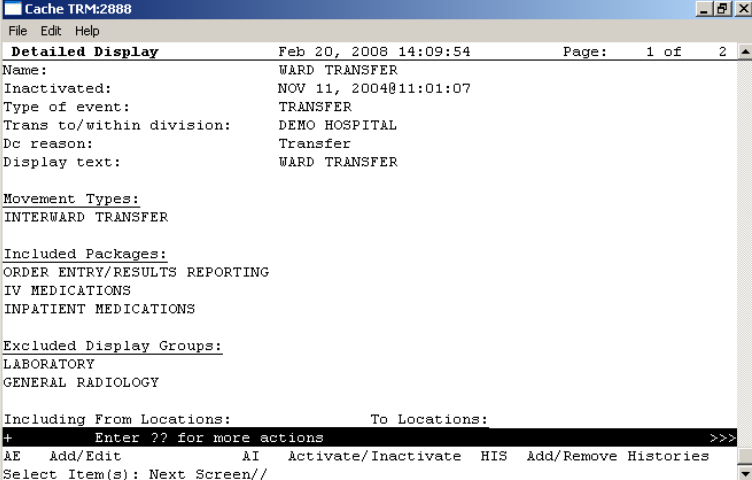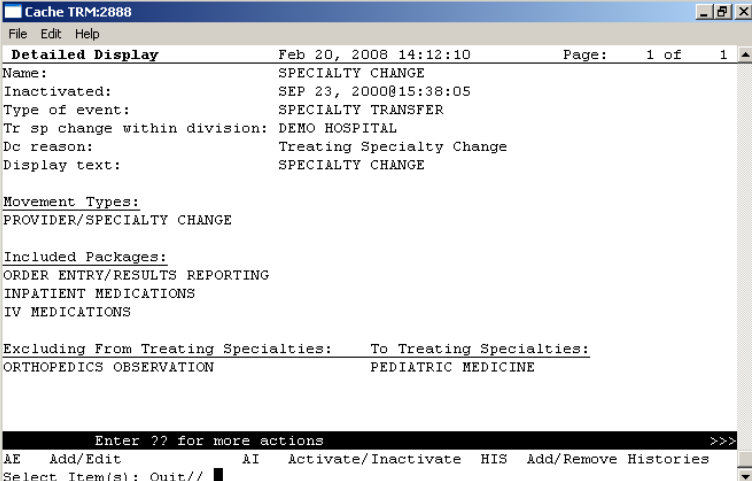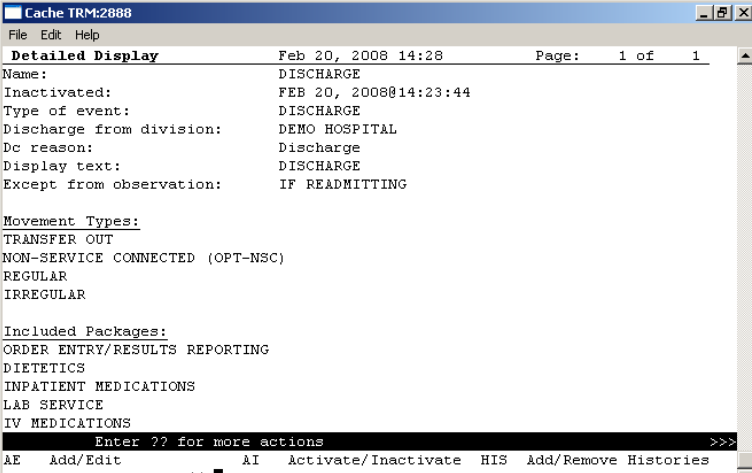
Sample Admission Rule. This is a sample Admission Rule that includes admission to all of the MAS movement types.	

Sample Ward Transfer. This sample shows Excluded Display Groups.	
Sample Specialty Change. This sample shows Excluding From Treating Specialties: To Treating Specialties.	
Sample Discharge. This shows included packages.	

3.5　　Audit and Activation History

The audit and activation histories on the detailed display can be toggled on or off depending on your preferences.

To toggle the audit and activation histories on or off, follow Steps 1-4 in section 2.5.2. You will be on the Detailed Display window.

1. Type **HIS** (Add/Remove Histories) at the "*Select Items*" prompt on the Detailed Display window.

2. At the *Do you want to include them on the detailed display?* prompt, type **Y** to include the audit and activation histories on the detailed display. Type **N** if you do not wish to display the audit and activation histories.

```
Detailed Display            Jan 17, 2008 14:43:07        Page:    1 of    1
Name:                        DEATH
Inactivated:
Type of event:               DISCHARGE
Discharge from division:     DEMO HOSPITAL
Dc reason:                   Death
Display text:                DEATH

Movement Types:
DEATH
DEATH WITH AUTOPSY

Included Packages:
ORDER ENTRY/RESULTS REPORTING
DIETETICS
CONSULT/REQUEST TRACKING
RADIOLOGY/NUCLEAR MEDICINE



Activation History:
Activated: Nov 11, 2004@11:01:07  Inactivated:
         Enter ?? for more actions                                          >>>
AE   Add/Edit           AI   Activate/Inactivate  HIS  Add/Remove Histories
Select Item(s): Quit//
```

The audit and activation history can be toggled on or off on the detailed display screen.

3.6   Changing the Display

The change display function allows you to adjust the size of the Delayed Orders / Auto-DC Set-up editor and configure the display to show active entries, inactive entries, or all entries. This is seldom used.

3.7   Files Associated with Auto-DC Rules

The OE/RR AUTO-DC RULES (#100.6) file is associated with Auto-DC Rules. This file contains the locally-defined rules that control if and when active orders are automatically discontinued within each division. **We strongly recommend that this file not be edited with File Manager**. Instead, CACs should use the Delayed Orders Configuration menu. [BEHOORDO MAIN].

Fields in OE/RR AUTO-DC RULES (#100.6)		
Field Number	Field Name	Description
.01	NAME	This is the name of the auto-DC rule. It is visible in the Rule Editor only.
.1	INACTIVATED	This rule will no longer apply after the date listed in this field.
1.5	ACTIVATION HISTORY	The activation events.
100.61,.01	ACTIVATION DATE/TIME	The date/time that this event was activated.
100.61,1	INACTIVATION DATE/TIME	This date/time that this event was inactivated.
.2	TYPE OF EVENT	This is the event that should cause orders to be automatically discontinued. For OR events, the orders will be discontinued when the TIME PAT OUT OF OR field is entered in the Surgery package.
.3	DIVISION	This is the division that this auto-dc rule should be applied to. For a transfer across divisions, this field should contain the division that the patient is going to.
.4	DC REASON	This field contains the reason the order was automatically discontinued.
.5	DISPLAY TEXT	This field contains the name of the rule as it will appear to the EHR users.
.6	EXCEPT FROM OBSERVATION	This field indicates if an observation treating specialty should prevent this rule from being applied when the patient is discharged from the observation treating specialty. If the field is set to YES then any discharge from an observation treating specialty will not auto-dc orders If the field is set to NO then any discharge from an observation treating specialty will auto-dc orders If this field is set to if readmitting then the person entering the discharge movement will be asked whether or not the patient will be readmitted immediately following this discharge (if the CPRS protocol is the no-task one). The appropriate action will be taken based on his or her answer.
.30	MAS MOVEMENT TYPES	When the MAS movement types defined in this field occur, this rule will be processed (if it is active).
100.63, .01	MAS MOVEMENT TYPE	The MAS Movement Type field further defines the trigger event for this rule. This allows for different rules for various types of MAS events. For example, to define a rule for canceling orders when a patient dies, enter the movement types DEATH and DEATH WITH AUTOPSY. A MAS movement type can only be used in one active rule.
40	EXCLUDED TREATING SPECIALTIES	These are treating specialties that will cause this rule to not be processed if the EXCEPT FROM and TO specialties match the patient's transfer.
100.64, .01	EXCEPT FROM SPECIALTY	This is a treating specialty that will prevent this rule from being applied. Specialty transfer rules will discontinue active orders unless the patient is being transferred from this specialty to one listed in the TO SPECIALTY multiple.

Fields in OE/RR AUTO-DC RULES (#100.6)		
Field Number	**Field Name**	**Description**
100.64,1	TO SPECIALTY	These are treating specialties that will cause this rule to not be processed, if the EXCEPT FROM and TO specialties match the patient's transfer.
100.641, .01	TO SPECIALTY	This is a treating specialty that will prevent this rule from being applied; specialty transfer rules will discontinue active orders unless the patient is being transferred to this specialty from the EXCEPT FROM SPECIALTY.
50	INCLUDED LOCATIONS	
100.62,.01	INCLUDED LOCATIONS ID	Enter an ID (free text) that will represent an entry in the FROM - TO location matrix. The value of the ID field is insignificant as it simply represents a placeholder. You can use any naming or numbering convention that you want. Orders will not auto-dc for location (ward) type transfers unless the transfer from and transfer to locations are identified within the INCLUDED LOCATIONS "from-to" entries. If the transfer from and to locations are found in this multiple then orders will auto-dc.
100.62,2	FROM LOCATION	If you did not select YES for the FROM ALL LOCATIONS field then you must select an individual field for the patient to be coming from.
100.62,3	TO ALL LOCATIONS	If this field is set to yes, it identifies all locations as possible "to" locations for the from-to pair.
100.62,4	TO LOCATION	If you did not select YES for the *TO ALL LOCATIONS* field then you must select an individual field for the patient to be going to.
60	INCLUDED DIVISIONS	If the division the patient was transferred from matches a value in this field, and the division has changed, the rule will be processed.
100.66, 01	FROM DIVISION	This is a division that will cause this rule to be applied. If a specialty change did not occur with the transfer, and the division has changed, then the patient must be moving from the division specified in this field in order for active orders to be discontinued.
70	INCLUDED PACKAGES	Orders associated with the packages specified in this field will be automatically discontinued when this rule is processed.
100.67,.01	TYPE OF ORDERS TO DC	This is a package whose active orders are to be automatically discontinued when the conditions of this rule are satisfied.
80	EXCLUDED ORDERABLE ITEMS	These are the orderable items that will not be automatically discontinued when this rule is processed.
100.68,.01	EXCEPT FOR ORDERABLE ITEM	The orderable items specified in this field are the orderable items that will not be automatically discontinued when this rule is processed
81	EDIT HISTORY	
100.681,.01	EDIT HISTORY	This field tracks the entering and editing of rules.
100.681,1	WHO ENTERED/EDITED	Name of person who added or edited this rule
100.681,2	ACTION	This field contains what action was taken on the rule

Fields in OE/RR AUTO-DC RULES (#100.6)

Field Number	Field Name	Description
100	EXCLUDED DISPLAY GROUP	Any order related to the display group entered in the EXCLUDED DISPLAY GROUP multiple will be exempt from any auto-discontinuing normally triggered by this rule. You can use the excluded display group to protect a group of orders from being auto-discontinued. If an order belonging to this display group is found while processing this rule, it will be skipped and will not be auto-discontinued.
100.65,.01	EXCEPT ORDERS IN DISPLAY GROUP	Orders related to this display group will not be auto-discontinued

The OE/RR PATIENT EVENTS (#100.2) file is used by the EHR to track what happened to a patient's orders as a result of an event, such as an MAS movement or returning from the OR.

Fields in OE/RR PATIENT EVENTS FILE (#100.2)

Field Number	Field Name	Description
.01	Patient	This is a pointer to the patient file.
.1	Activity	This multiple contains a log of actions taken on this event that are relevant to the release or discontinuance of orders.
100.25.01	Date/Time of Activity	This is the actual date and time that activity occurred.
100.25.2	Type of Event Activity	This field is a code indicating the type of activity that occurred. This can be new, edited, re-entered, manually released, deleted, or cancelled An event can also be "lapsed" if it stays unprocessed beyond the time frame defined by the "Lapse in #Days" field of the OE/RR RELEASE EVENTS file #100.5 for this event.
100.25.3	User	This field is the user who entered or modified the activity.
100.25.4	Event Type	This field is the type of event that was processed. This could be an admission, discharge, transfer, out of O.R., or specialty change event.
100.25.5	MAS Movement Type	This field is the MAS Movement Type of the activity that was processed, if it was a MAS patient movement.
100.25.6	Treating Specialty	This field is the treating specialty associated with this activity, if it is a MAS patient movement.
100.25.7	Ward Location	This field is the ward location associated with this activity, if it is a MAS patient movement.
.2	Event	This field is a pointer to the OE/RR RELEASE EVENTS file, which defines the conditions under which delayed orders are to be released for this patient event, if delayed orders are related to this event.
.3	Admission	This field is a pointer to the Admission movement for which this event is valid. If the patient is an inpatient when delayed orders are written, this field will be the current admission. Otherwise, the admission movement will be recorded when the patient is admitted and the orders are released. If the patient is discharged without this event occurring, it will be retired and any orders still delayed will be lapsed.
.4	Order	This field is a pointer to the doctor's order requesting that this event occur for this patient when delayed orders are written.

Fields in OE/RR PATIENT EVENTS FILE (#100.2)		
Field Number	Field Name	Description
.5	Created On	This field is the timestamp of when this event was entered into the file for this patient.
.6	Created By	This field is a pointer to the user who entered this event into the file for this patient.
.11	Event Date/Time	This field is the date and time that this event occurred for this patient; if the event is a MAS movement, this time will be the DATE/TIME from the MAS movement file.
.12	Patient Movement	This field is a pointer to the MAS Patient Movement that satisfied this event for this patient; any changes to this movement that alter the conditions of the event will be tracked in the activity log.
.13	Auto-DC Rule	This field is the Auto-DC Rule from file #100.6 that was used to automatically discontinue active orders when this event occurred. Those orders that were discontinued are listed in the Discontinued Orders multiple of this file.
.14	Surgery	This field is a pointer to the Surgery case that satisfied this event for this patient when the TIME PAT OUT OR field was entered; any changes to this field will be tracked in the Activity log.
.20	Released Orders	This multiple field contains the orders that were released based on the release event defined in the OE/RR RELEASE EVENTS file #100.5 when this event occurred.
100.26.01	Released Orders	This field is a pointer to the Orders file #100 of an order that was released as a result of the event occurring.
.30	Discontinued Orders	This multiple contains the orders that were automatically discontinued based on the rules defined in the OE/RR AUTO-DC RULES file #100.6 when this event occurred.
100.27.01	Discontinued Orders	This field is the number of the order in the Orders file #100.
100.62, 3	To all Locations	This is a hospital location that will cause this rule to be applied; if no specialty change occurs with the transfer, then the patient must be moving to this location from the FROM LOCATION for active orders to be discontinued.
100.62, 4	To Location	If you did not set the TO ALL LOCATIONS field to YES then you must specify the location the patient is moving TO that will match with the selection made for the FROM location (either all or individual).\n\nThis is a hospital location that will cause this rule to be applied; if no specialty change occurs with the transfer, then the patient must be moving to this location from the FROM location for the active orders to be discontinued.
60	Included Divisions	These are the divisions that will cause this rule to be processed, if the FROM division matches the patient's transfer.
100.66,.01	From Division	This is a division that will cause this rule to be applied; if no specialty change occurs with the transfer, then the patient must be moving from this division for active orders to be discontinued.
70	Included Packages	These are the packages whose orders are to be automatically discontinued when this rule is processed.
100.67,.01	Type of Orders to DC	This is a package whose active orders are to be automatically discontinued when the conditions of this rule are satisfied.

Fields in OE/RR PATIENT EVENTS FILE (#100.2)		
Field Number	**Field Name**	**Description**
80	EXCLUDED ORDERABLE ITEMS	These are the orderable items that are NOT to be automatically discontinued when this rule is processed, even if an order for it belongs to a package in the INCLUDED PACKAGES multiple.
100.68, .01	EXCEPT FOR ORDERABLE ITEM	This is an orderable item that will be exempt from any automatic discontinuing of orders normally triggered by this rule; if an active order for this item is encountered while processing this rule, it will be skipped and not discontinued.
81	Edit History	
100.681,.01	Edit History	Tracks the entering and editing of rules.
100.681,1	WHO ENTERED/EDITED	Name of person who added or edited this rule
100.681,2	Action	This is the action that was taken on the rule.
100	Excluded Display Group	
100.65, .01	Except Orders in Display Group	Any order related to the display group entered in the excluded display group multiple will be exempt from any auto-discontinuing normally triggered by this rule.

4.0   Order Checks

Although Order Checking has been set up for outpatient, you need to review this concept for inpatient. Refer to the CAC Guide for Order Checks.

Order Checking is based on a system of rules that review orders to see if they meet defined criteria. If they meet the criteria, an electronic message is sent to the ordering provider before the order is completed (such as duplicate order, drug-lab interaction, etc.). The provider can then choose to cancel the order or override the order check and place the order.

The Order Checking system lets users determine when order checks and notifications are sent. To accomplish this, EHR includes several prepackaged order checks as well as the Order Check Configuration Menu for setting several parameters to ensure that order checking works properly.

Order Checks can also be configured to be mandatory by the Clinical Applications Coordinator (CAC) or IRM. If this feature is enabled, mandatory order checks cannot be edited by the end users. Non-mandatory order checks can be enabled or disabled by selecting Tools → Options.

4.1   Relationship of Order Checking to Notifications

Order Checks are similar to Notifications in that both review existing data and current events to produce a relevant message that is presented to patient care-givers. Also, both systems use the CPRS expert system (OCX namespace), to define logical expressions for this evaluation and message creation. In addition to the expert system, both systems have some hard-coded algorithms. For example, the critical drug interaction order check is made via an entry point in the pharmacy package whereas renal functions for patients over 65 is defined as a rule in the CPRS expert system.

The main difference between the two systems is their focus. Order Checks are a real-time process that occurs during the ordering session and are driven by responses entered by the ordering provider. Order Check messages are displayed interactively in the ordering session. In contrast, Notifications occur behinds the scenes, monitoring data as it flows through DHCP and when certain trigger events occur.

4.2   How Does Order Checking Work?

Order Checking performs checks while ordering is taking place.

Before orders go to services such as Lab and Pharmacy, they are sent to Order Checking where the ordered item is evaluated by an expert system rule against data from patient files. If one or more of the designated rules of logic for that type of order is met, order check messages are presented to the clinician placing the order.

Order checks exported with EHR

- LAB RESULTS
- ORDER REQUIRES CHART SIGNATURE
- FLAG ORDER FOR CLARIFICATION
- ORDER REQUIRES ELEC SIGNATURE
- ABNORMAL LAB RESULTS (ACTION)
- ADMISSION
- UNSCHEDULED VISIT
- DECEASED PATIENT
- IMAGING PATIENT EXAMINED
- IMAGING RESULTS
- CONSULT/REQUEST RESOLUTION
- CRITICAL LAB RESULT (INFO)
- ABNORMAL IMAGING RESULTS
- IMAGING REQUEST CANCEL/HELD
- NEW SERVICE CONSULT/REQUEST
- SERVICE ORDER REQ CHART SIGN
- CONSULT/REQUEST CANCEL/HOLD
- NPO DIET MORE THAN 72 HRS
- FLAGGED OI RESULTS - INPT
- ORDERER-FLAGGED RESULTS
- DISCHARGE
- TRANSFER FROM PSYCHIATRY
- ORDER REQUIRES CO-SIGNATURE
- FLAGGED OI ORDER - INPT
- LAB ORDER CANCELED
- STAT ORDER
- STAT RESULTS
- DNR EXPIRING
- FREE TEXT
- MEDICATIONS EXPIRING
- UNVERIFIED MEDICATION ORDER
- NEW ORDER
- STAT IMAGING REQUEST
- URGENT IMAGING REQUEST
- IMAGING RESULTS AMENDED
- ORDER CHECK
- FOOD/DRUG INTERACTION
- ERROR MESSAGE
- CRITICAL LAB RESULTS (ACTION)
- ABNORMAL LAB RESULT (INFO)
- UNVERIFIED ORDER
- FLAGGED OI RESULTS - OUTPT
- FLAGGED OI ORDER - OUTPT
- DC ORDER

- CONSULT/REQUEST UPDATED
- FLAGGED OI EXPIRING - INPT
- FLAGGED OI EXPIRING - OUTPT
- CONSULT/PROC INTERPRETATION
- IMAGING REQUEST CHANGED
- LAB THRESHOLD EXCEEDED
- POV REQUIRED
- E&M CODE REQUIRED

> **NOTE:** All of these order checks are exported in the disabled state at the system level. Sites can then turn them on for individuals or teams, as determined by the site. CACs, individuals, or services can also disable individual order checks, if they so choose.

4.3   Order Check Configuration Menu

Several parameters must be set before certain order checks can work properly. Options in the Order Check Configuration Menu allow you to set these parameters. You access this menu in RPMS: select EHR → ORD → OCX.

```
                      Order Check Configuration

    ACT      Activate/Inactivate Rules
    COM      Compile Rules
    ENA      Enable/Disable Order Checking System
    INQ      Expert System Inquiry
    PAR      Order Check Parameters ...
Select Order Check Configuration Option:
```

The ACT and COM options are not used.

4.3.1   Enable/Disable Order Checking System (ENA)

Use this option to turn specific order checks on or off for a user or location. The option works by entering a processing flag for an entity and order check. The entity can be a user, location, service, division, or system.

Select the ENA (Enable/Disable Order Checking System) option on the Order Check Configuration menu to display the following:

```
                 Enable/Disable Order Checking System

Enable or disable order checking system. may be set for the following:

     1   Division      DIV    [DEMO INDIAN HOSPITAL]
     2   System        SYS    [DEMO.OKLAHOMA.IHS.GOV]

Enter selection: 2  System   DEMO.OKLAHOMA.IHS.GOV
```

```
 Setting Enable or disable order checking system.  for System:
DEMO.OKLAHOMA.IHS
.GOV
Value: Enable// ?

Enter 'Enable/E' for order checking, 'Disable/D' to stop order checking. Can be
set at the Institution, System, or Package Level.

     Select one of the following:

          E           Enable
          D           Disable

Value: Enable//
```

4.3.2   Order Check Parameters (PAR)

Select the Order Check Parameters (PAR) option on the Order Check Configuration
Menu to display the following:

```
                         Order Check Parameters


    CON     Creatinine Date Range for Contrast Media Orders
    CTH     CT Scanner Height Limit
    CTW     CT Scanner Weight Limit
    DAN     Set Clinical Danger Level
    DBG     Enable/Disable Debug Message Logging
    DPL     Lab Duplicate Order Range
    DPO     Orderable Item Duplicate Order Range
    DPR     Radiology Duplicate Order Range
    EDT     Mark Order Checks Editable by User
    ENA     Enable/Disable an Order Check
    GLU     Creatinine Date Range for Glucophage-Lab Results
    LCL     Edit Local Terms
    MRH     MRI Scanner Height Limit
    MRW     MRI Scanner Weight Limit
    PLY     Number of Medications for Polypharmacy
    USR     Order Checks a User Can Receive

Select Order Check Parameters Option:
```

The items in bold need to be reviewed for inpatient. For inpatient, these need to be set
up by location.

4.3.2.1   Lab Duplicate Order Range (DPL)

Select the Lab Duplicate Order Range (DPL) on the Order Check Parameters menu to
display the following:

```
                         Lab Duplicate Order Range

Duplicate lab orders date range may be set for the following:

     1    Location      LOC    [choose from HOSPITAL LOCATION]
     2    Service       SRV    [choose from SERVICE/SECTION]
     3    Division      DIV    [DEMO INDIAN HOSPITAL]
     4    System        SYS    [DEMO.OKLAHOMA.IHS.GOV]
```

```
Enter selection: 1  Location      MED/SURG

- Setting Duplicate lab orders date range  for Location: MED/SURG - Value: ?

Enter the number of hours back in time you wish to check for duplicate
orders.

Value: 4
```

Use this option to set the number of hours backwards in time to look for duplicate lab orders. For example, a value of "24" indicates a lab procedure intended to be collected within 24 hours of the collection of the same lab procedure will trigger an order check indicating duplicate lab order. The range can be set up differently for various locations. For example, a lab could be a duplicate in outpatient areas if ordered within 30 days, but a lab in ICU would not be a duplicate if ordered in 24 hours.

The package default is 48 hours and covers all labs except those specifically mentioned in the orderable item duplicate range.

4.3.2.2   Orderable Item Duplicate Order Range (DPO)

Select the Orderable Item Duplicate Order Range (DPO) on the Order Check Parameters menu to display the following:

```
                 Orderable Item Duplicate Order Range


Orderable item duplicate date range may be set for the following:

    1    Location     LOC   (choose from HOSPITAL LOCATION)
    2    Service      SRV   (choose from SERVICE/SECTION)
    3    Division     DIV   (DEMO HOSPITAL)
    4    System       SYS   (DEMO.MEDSHERE.COM)

Enter selection: 1   Location   MED/SURG

 Setting Orderable item duplicate date range for Location: MED/SURG
Select Orderable Item: Nutrition Consult
Hours: 24
```

Use this option to set the number of hours backwards in time to look for duplicate orders related to specific orderable items. The duplicate order range for lab and radiology procedures in general is set by the Lab Duplicate Order Range and Radiology Duplicate Order Range options.

This is for SPECIFIC orderable items (not all text orders), and it takes precedence over the lab and radiology duplicates. So, you could set the duplicate radiology order to 48 hours but come into this option and set the duplicate chest x-ray order to 8 hours.

4.3.2.3   Radiology Duplicate Order Range (DPR)

Select the Radiology Duplicate Order Range (DPR) on the Order Check Parameters menu to display the following:

```
                         Radiology Duplicate Order Range

Duplicate radiology order date range may be set for the following:

      1    Location       LOC     [choose from HOSPITAL LOCATION]
      2    Service        SRV     [choose from SERVICE/SECTION]
      3    Division       DIV     [DEMO INDIAN HOSPITAL]
      4    System         SYS     [DEMO.OKLAHOMA.IHS.GOV]

Enter selection: 1    Location    MED/SURG

 Setting Duplicate radiology order date range  for Location: MED/SURG

Value: ?

Enter the number of hours back in time you wish to check for duplicate
orders.

Value: 24
```

Use this option to set the number of hours backwards in time to look for duplicate radiology orders. For example, a value of "48" indicates a radiology procedure intended to be performed within 48 hours of the completion of the same radiology procedure will trigger an order check indicating duplicate radiology order. This range can be setup differently for various locations.

The package default is 48 hours and includes all items except those covered in the orderable item duplicate range.

4.4   Order Check Preferences

The users can view the Order Checks preferences in the EHR by selecting Tools → Options. Then go to the Order Checks tab on the Options dialog.
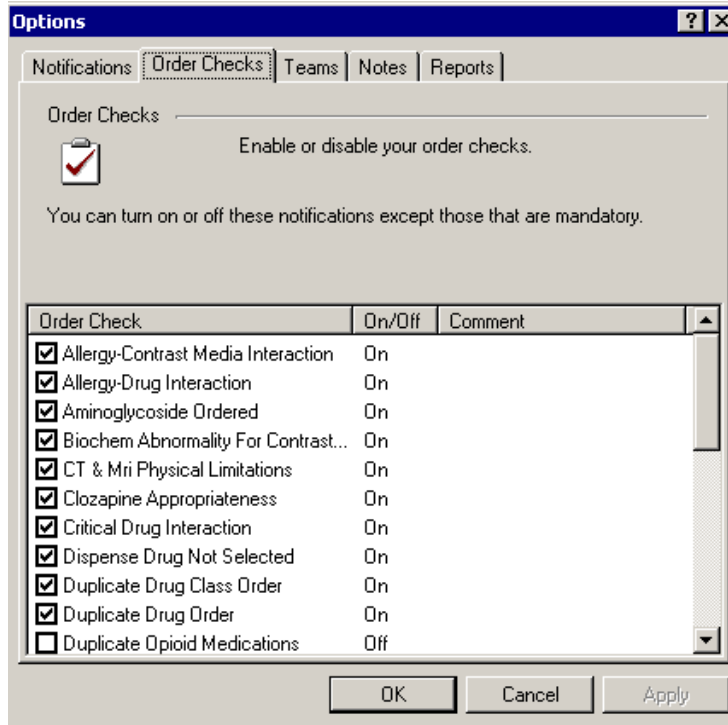
Figure 4-1: Order Checks Preferences in the EHR

5.0   Notifications

This section has information about the menu setup for Notifications and the Notification Management Menu. Refer to the CAC Guide for the setup.

Special considerations should be given to flagging orderable items, teams, locations, unverified orders, and expiring meds.

EXAMPLES:

You might flag the orderable item Restraints to notify Risk Management for each patient placed in restraints.

Orderable items can be flagged for the infection control nurse, e.g., Foley catheter.

Orderable items can be flagged for high risk situations. For example, patients identified as Fall Risk on the nursing assessment will allow nurses to enter a Fall Risk order by policy. Flag the orderable item Fall Risk to notify Risk Management.

Expiring meds will notify the hospitalist a defined number of hours in advance of the medication order expiring.

Notifications for unverified orders can be sent to a defined team of inpatient nurses. The team must be created using the Team List Management menu.

6.0   Team List Management

Clinicians can create patient lists by ward, by clinic, or by patient to use for displaying results or creating reports. They can build lists, delete lists, merge lists, add or delete patients from lists, or inquire to a file of patient lists.

Clinical applications coordinators can help to set up team lists for groups of clinicians and related hospital personnel.

A user can define a team list in the Personal Preferences Options dialog. The team lists help determine who receives notifications for patients defined on the lists.

You will be using the Team List Management Menu to manage the team lists. You access this menu by selecting in RPMS: EHR → PAT → TEA. You will be on the Team List Management Menu.

```
                      Team List Management Menu


    CRE     Create/Add to Team List
    DEL     Delete Existing List(s)
    DPT     Display Patients Linked to a User via Teams
    DUS     Display User's Teams
    EXA     Examine/Print Existing List(s)
    RAL     Remove Autolinks
    REN     Rename Existing List(s)
    RPA     Remove Patients from a List
    RPR     Remove Providers from a List

Select Team List Management Menu Option:
```

6.1   Create/Add to Team List (CRE)

A team list is a list containing patients related to several providers. These providers are the list's users. You may now create a new team list or add autolinks, users and/or patients to an existing team list. Autolinks automatically add or remove patients with ADT movements. Users on the list may receive notifications regarding patients on the same list. Please prefix your list name with TEAM or SERVICE (e.g., TEAM7B, SERVICECARDIOLOGY.)

1. Type CRE at the "Select Team List Management Menu Option" prompt on the Team List Management Menu.

2. **Enter a name for the team:** this often begins with the type of team, for example, Consult Physical Therapy for consult resulting teams.

3. Verify the addition of a new team.

4. **Enter Type:** this is the type of list being defined.

    Team Lists can be any of the following:

- P – Personal Patient
- TA – Maintained by Autolinks for addition and removal of patients.
- TM – Manually maintained (addition and removal).
- MRAL – Manual removal of patients from the list with Autolink addition of patients to the list.

Here are the prompts for **MRAL** (MRAL Manual removal of patients from the list with Autolink addition of patients to the list).

```
Enter team list name:  TEAM/ORANGE
   Type: Manual Removal Autolinked Team List

   Enter team autolink: W.ACU

    Searching for a WARD,  (pointed-to by AUTOLINK)


    Searching for a WARD
ACU

    ...OK? Yes//    (Yes)
    [ADT movements linked to ACUT will now automatically add patients to this list.]

    Adding patients linked to ACU ...

    20 patient added.

    Enter team autolink:
```

> You can then add additional wards or clinics to the team and add specific providers to the team.

- Add Providers (this is optional)

```
Enter type: TA  TEAM PATIENT AUTOLINKED

Enter team autolink:  W.AC

    Searching for a WARD,  (pointed-to by AUTOLINK)
    Searching for a WARD
ACU

    ...OK? Yes//    (Yes)
    [ADT movements linked to ACUT will now automatically add patients to this list.]

    Adding patients linked to ACU ...

    20 patient added.

    Enter team autolink:

    Enter team provider/user:  HAGER,MARY G    MGH    CONSULTANT-CURES

    Enter team provider/user:
```

> After entering the patients, you can add the providers for this team.

5. Examine/Print Existing Lists(s) (ORLP EXAMINE/PRINT)

    The list of patients and providers do not show up in the Create/Add a Team List option. Use this option to examine or print an existing patient list.

6. Remove Providers from a List (ORLP TEAM DELETE USERS)

Use this option to remove users/providers from a team list.

7. Remove Patients from a List (DELETE PATIENTS)

Use this option to remove patients from a team list.

8. Delete Existing List(s) (ORLP TEAM DELETE)

Use this option when you no longer need a team list that you have built and want to delete the list.

9. Remove Autolinks (ORLP TEAM DELETE AUTOLINKS)

Use this option to remove existing Autolinks from a team list and the patients associated with the removed autolinks.

Autolinks automatically add or remove patients with ADR movements.

10. Rename an Existing List

Use this option to rename a specified team list.

6.2   Display User's Teams (DUS)

This option applies to the current user.

Type **DUS** at the "Select Team List Management Menu Option" prompt on the Team List Management Menu.

The system will ask if you want to find teams linked to user [USER NAME]. Press Enter.

The teams associated with [USER NAME] displays.

6.3   Display Patients Linked to a User Via Teams (DPT)

This option applies to the current user.

Type **DPT** at the "Select Team List Management Menu Option" prompt on the Team List Management Menu.

The system asks if you want to find patients linked via teams to user [USER NAME]. Press Enter.

The next window shows the linked patients.

7.0 Consults

This section provides information for setting up consults for use in the EHR.

7.1 Set up Consult Services

You set up consult services using the Setup Consult Services (SS) option on the Consult Tracking Configuration menu (this menu is on the RPMS-EHR Configuration Master Menu). See CAC Guide for complete instructions.

7.2 Special Considerations for Consult Quick Orders

When constructing a consult quick order, note that Category field is set to inpatient or left blank if the consult is used for both outpatient and inpatient.

Identify if specific inpatient consults are required; for example, inpatient nutrition and outpatient nutrition.

8.0   **Printing Orders**

To set up printing orders, go to the Order Entry Configuration menu. You access this by selecting in RPMS: EHR → ORD (Order Entry Configuration) → PRN (Print/Report Parameters).

8.1   Print/Report Parameters (PRN)

```
                      Print/Report Parameters

   CHT    Chart Copy Parameters
   HOS    Print Parameters for Hospital
   LOC    Print Parameters for Wards/Clinics
   REQ    Requisition/Label Parameters
   SUM    Summary Report Parameters
   SVC    Service Copy Parameters
   WRX    Work Copy Parameters

Select Print/Report Parameters Option:
```

8.1.1   Chart Copies Parameters (CHT)

Usually you want Chart copies of orders.

Select the Chart Copy Parameters (CHT) option on the Print/Report Parameters menu to display the following:

```
                     Chart Copy Parameters

Chart Copy Definition for System: DEMO.MEDSPHERE.COM
-----------------------------------------------------------------------------
Chart Copy Format
Chart Copy Header
Chart Copy Footer
Expand Continuous Orders
Print Chart Copy When
Prompt for Chart Copy
-----------------------------------------------------------------------------
CHART COPY FORMAT:
```

Use this option to edit hospital-wide Chart Copy parameters.

Please note this about the "Prompt for Chart Copy" prompt: This is whether or not providers will be asked the name of the print for the chart copies.

All copies printed from the EHR are not considered official copies. Chart copies can be automatically printed on the ward.

Before you can select a format, it must already be defined in the print formats. Go to EHR → RPT → FMT. Then use ?? to view the list. Next, select the format you want to review before using it in the above parameters.

8.1.2   Print Parameters for Hospital (HOS)

Select the Print Parameters for Hospital (HOS) option on the Print/Report Parameters menu to display the following:

```
                    Print Parameters for Hospital

Miscellaneous Hospital Prints for System: DEMO.MEDSPHERE.COM
-------------------------------------------------------------------------
Initials on Summary                              YES
Requisition Sort Field
Label Sort Field
Order Summary Sort Forward                       YES
Prompt for Chart Copy                            DON'T PROMPT
Prompt for Work Copy                             PROMPT AND ASK DEVICE
Prompt for Requisitions                          DON'T PROMPT
Prompt for Labels                                DON'T PROMPT
-------------------------------------------------------------------------
PRINT INITIALS ON SUMMARY REPORT: YES//
```

Use this option to edit hospital-wide print parameters for OE/RR.

8.1.3   Print Parameters for Wards/Clinics (LOC)

Select the Print Parameters for Wards/Clinics (LOC) option on the Print/Report Parameters menu to display the following:

```
                    Print Parameters for Wards/Clinics

Select HOSPITAL LOCATION NAME: GENERAL

Print Definition (Loc) for Location: GENERAL
-------------------------------------------------------------------------
Chart Copy Print Device                          S-132
Prompt for Chart Copy                            DON'T PROMPT
Work Copy Print Device                           S-132
Prompt for Work Copy                             PROMPT AND ASK DEVICE
Requisitions Print Device                        S-132
Prompt for Requisitions                          DON'T PROMPT
Labels Print Device                              S-132
Prompt for Labels                                DON'T PROMPT
Daily Order Summary Device                       S-132
Service Copy Default Device   RADIOLOGY/NUCLEAR MEDICATIN S-132
Print Chart Copy Summary
Print Daily Order Summary
-------------------------------------------------------------------------
CHART COPY PRINT DEVICE: S-132//
```

Use this option to edit print parameters for each ward. All fields do not have to be populated.

8.1.4   Requisition/Label Parameters (REQ)

Select the Requisition/Label Parameters (REQ) option on the Print/Report Parameters menu to display the following:

```
                      Requisition/Label Parameters

Requisition/Label Definition for System: DEMO MEDSPHERE.COM
--------------------------------------------------------------------------
Ward Requisition Format      LAB SERVICE          LAB REQUISITION
Ward Requisition Header
Ward Requisition Footer
Ward label Format
Prompt for Requisitions                           DON'T PROMPT
Prompt for Labels                                 DON'T PROMPT
--------------------------------------------------------------------------


For Ward Requisition Format -
Select Package:
```

Use this option to edit print parameters for requisitions or labels. A Requisition is a working copy of order(s) that will be sent with the order to the service. It doesn't contain a header or footer.

Before you can select a Ward Requisition Format, it must already be defined in the print formats. Go to EHR → RPT → FMT. Then use ?? to view the list. Next, select the report format you want to review before using it in the above parameters.

8.1.5   Summary Report Parameters (SUM)

Select the Summary Report Parameters (SUM) option on the Print/Report Parameters menu to display the following:

```
                      Summary Report Parameters

Summary Report Definition for System: DEMO MEDSPHERE.COM
--------------------------------------------------------------------------
Chart Copy Summary Sort Forward
Work Copy Summary Sort Forward
Print 'NO ORDERS' on summary
Condensed Order Summary
Print All orders on Chart Summary
--------------------------------------------------------------------------
CHART SUMMARY ORDER:
```

Use this option to edit Summary Report site parameters.

8.1.6   Service Copy Parameters (SVC)

Select the Service Copy Parameters (SVC) option on the Print/Report Parameters menu to display the following:

```
                      Service Copy Parameters

Select PACKAGE: INPATIENT MEDICATIONS     PSJ


Service Copy Definition for System: DEMO MEDSPHERE.COM,  INPATIENT MEDICATIONS
--------------------------------------------------------------------------
Service Copy Format          INPATIENT MEDICATIONS    DOCTOR'S ORDERS
Service Copy Header          INPATIENT MEDICATIONS    WORK COPY HEADER
Service Copy Footer          INPATIENT MEDICATIONS    WORK COPY FOOTER
Service Copy Default Device  INPATIENT MEDICATIONS    LASER
```

```
--------------------------------------------------------------------------

SERVICE COPY FORMAT: DOCTOR'S ORDERS//
```

Use this option to edit Service Copy parameters. This is where you set up the print formats for inpatient pharmacy service copies.

Before you can select a format, it must already be defined in the print formats. Go to EHR → RPT → FMT. Then use ?? to view the list. Next, select the format you want to review before using it in the above parameters.

8.1.7   Work Copy Parameters (WRK)

Select the Work Copy Parameters (WRK) option on the Print/Report Parameters menu to display the following:

```
                        Work Copy Parameters

Work Copy Definition for System: DEMO.MEDSPHERE.COM
--------------------------------------------------------------------------
Work Copy Format                                 WORK COPY FORMAT
Work Copy Header                                 WORK COPY FORMAT
Work Copy Footer                                 WORK COPY FORMAT
Prompt for Work Copy                             PROMPT AND ASK DEVICE
--------------------------------------------------------------------------
WORK COPY FORMAT: WORK COPY FORMAT//
```

Use this option to edit Work Copy parameters.

Before you can select a format, it must already be defined in the print formats. Go to EHR → RPT → FMT. Then use ?? to view the list. Next, select the format you want to review before using it in the above parameters.

8.2   Special Considerations

Special considerations must be given to: (1) contingency plans, (2) as a flag about the order, and (3) local policies.

9.0   Contact Information

If you have any questions or comments regarding this distribution, please contact the OIT Help Desk by:

Phone: (505) 248-4371 (local) or

                (888) 830-7280 (toll free)

Fax: (505) 248-4297

Web: http://www.ihs.gov/GeneralWeb/HelpCenter/Helpdesk/index.cfm

Email: support@ihs.gov