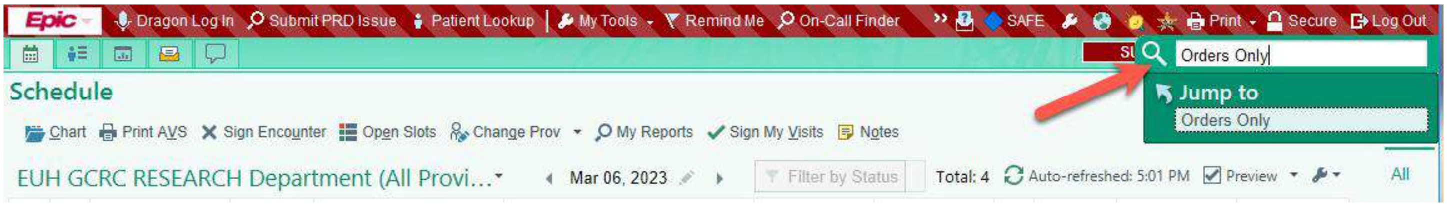
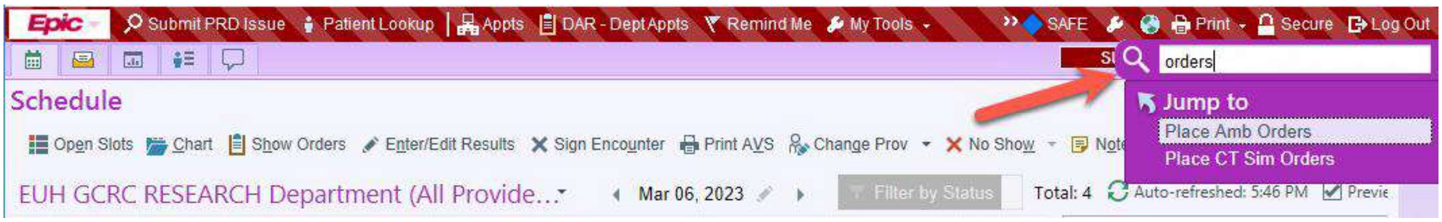
Clinical Research Coordinator - Research Orders

Place Research Orders

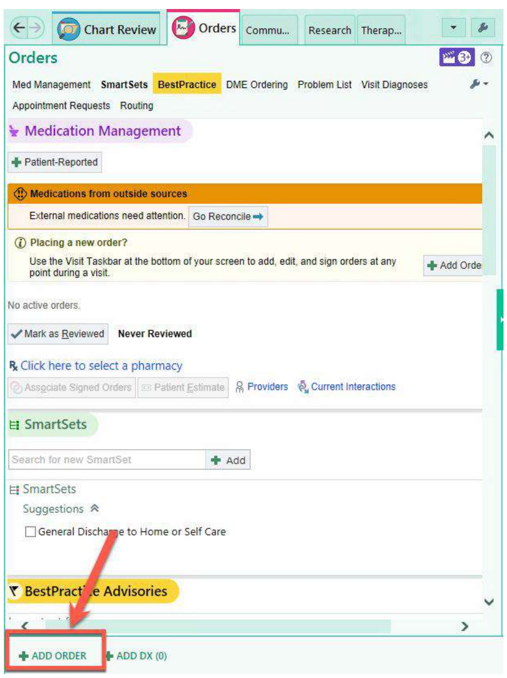
Research coordinators commonly queue up orders for a study so that providers can easily review and sign.

1. Search for and select **Orders Only** or **Place Amb Orders**.

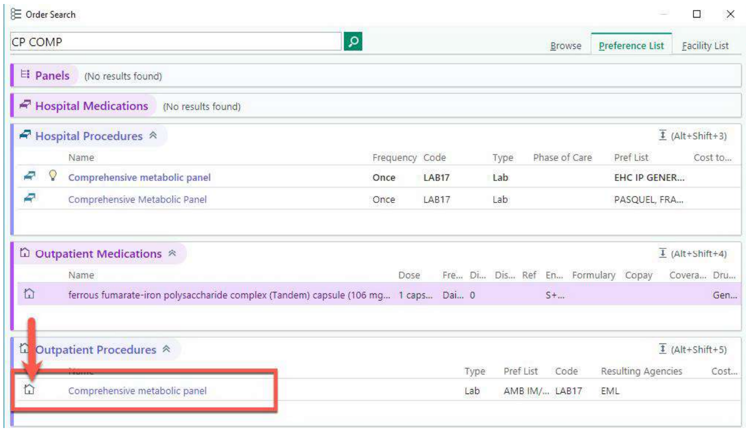




2. Search for and select the patient.
3. The visit navigator will open. Click **Add Order** button at the bottom of the screen



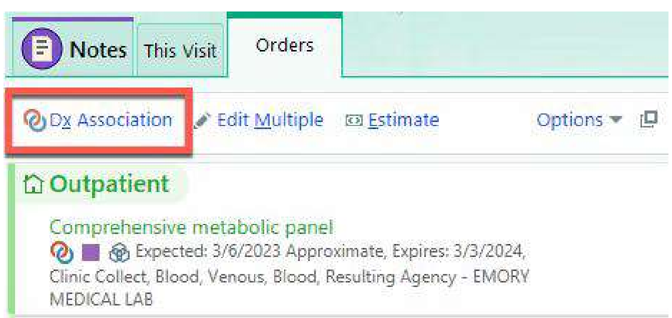
4. Search for and select the appropriate order. Outpatient orders are identified by a house icon while inpatient orders have a bed icon.



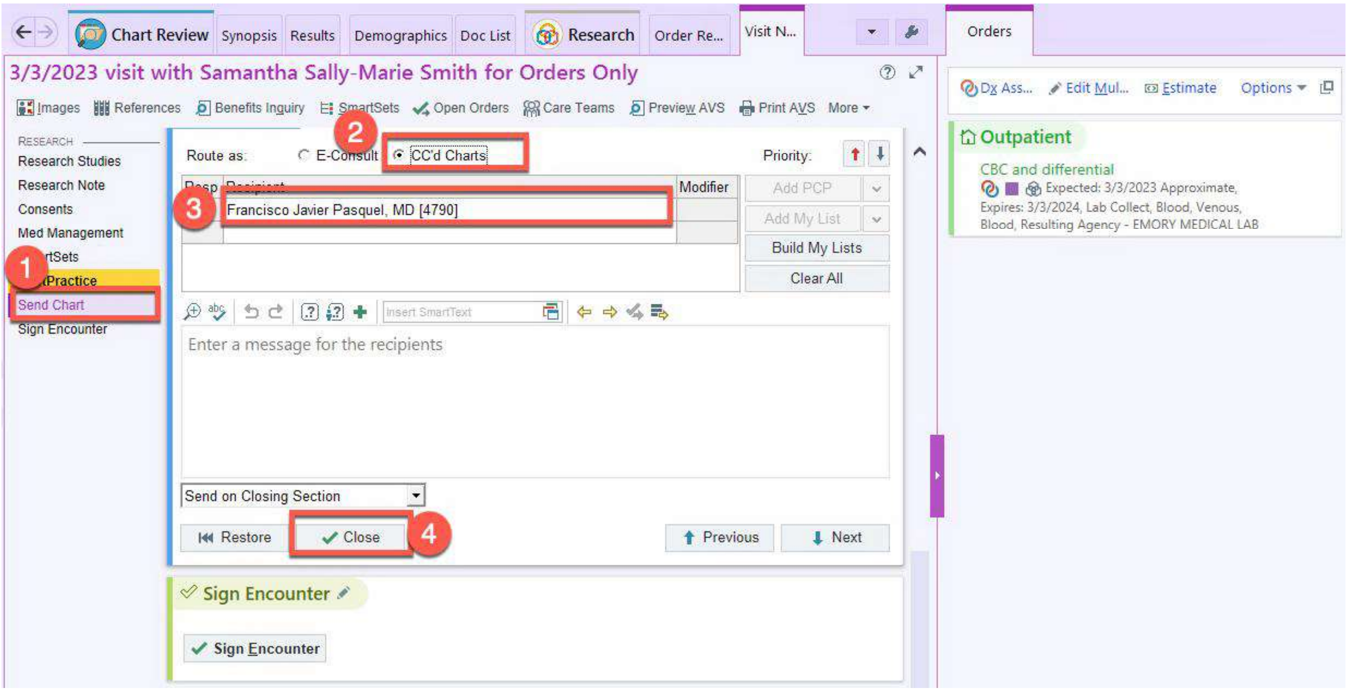
5. Make the appropriate selections then click **Accept**.

6. Once all orders have been added, associate the orders to the study by clicking the  button or click **Options** and select **Research Association**. Select the appropriate Research Study to associate the order with, then click **Accept**.

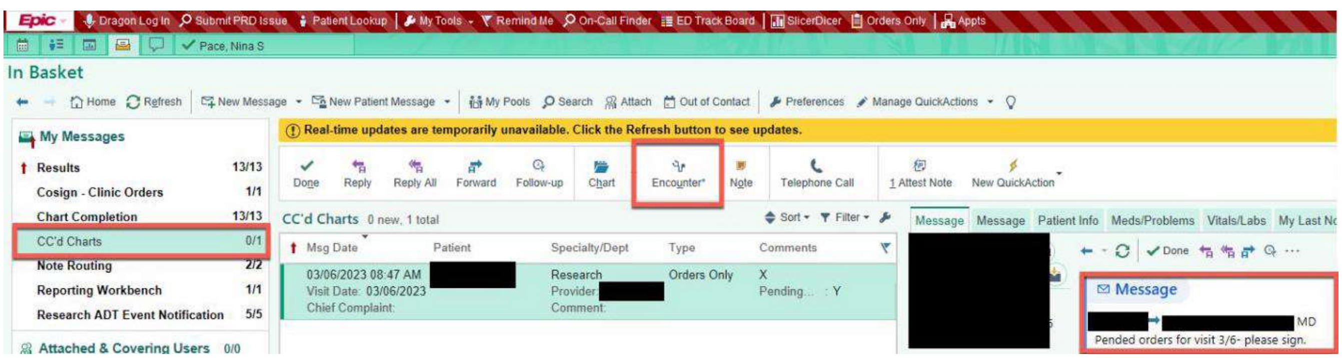
7. Click **Dx Association**. Select the appropriate diagnosis to associate the order with, then click **Accept**.



8. Providers click **Sign Orders** then close the encounter. Nurses and Research Coordinators continue below.
9. Non-Providers click **Options** and select **Providers**. Enter the ordering provider details then **Accept**.
10. Nurses click **Sign Orders** then close the encounter. Research Coordinators continue below.
11. Research Coordinaotrs select (1**) Send Chart** from the visit navigator on the left hand side. (2) Select Route as **CC'd Charts** InBasket Folder. (3) Enter the signing Provider as the **Recipient** then add a **message** such as "Please sign pended orders for research visit." (4) Click **Close** to send the chart to the signing Provider.



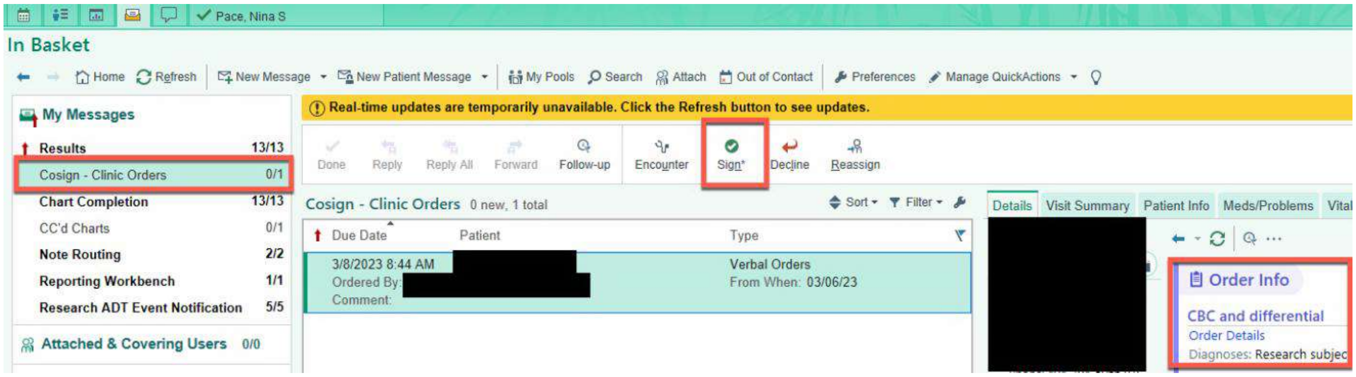
12. Click  then close the encounter.
13. The signing Provider will find the InBasket message from Research Coordinators in their CC'd charts folder. From there, they select the message then click Encounter.



14. In the bottom right-hand corner, click to view the Unsigned Order.

15. The order opens and can be reviewed then click **Sign Orders** in the bottom right-hand corner.

16. The co-signing provider will find the InBasket message from Nurses in their Cosign – Clinic Orders folder. From there, they slect the message then click **Sign Orders**.



Associate orders with research studies

The patient must have an active association with a research study before you can associate any orders with it, and you can associate an order with only one study.

These associations appear in Order Review, as well as in the order-related tabs of Chart Review, such as the **Procedures** tab. This gives a more complete picture of a patient's care so that other clinicians and staff can make better informed care decisions for patients who are participating in studies. It also makes billing easier for study-associated orders and helps with identifying and filtering study-related results.

1. Open an encounter for a patient who has an active association with a research study.
2. Enter an order and open the Associate Research Studies window using one of these paths:
   a. In Ancillary Orders, click the button.
   b. In the Orders activity and other ordering activities, click **RSH Assoc** or click **Options** and select **Research Association**.
3. Select the order that should be associated with the study and click **Accept**. An icon appears next to the order name.
4. Sign or Pend the orders as usual (this will depend on your credentials).

	Identify orders associated with research studies in Chart Review and Order Review. Associated orders appear with an icon in the Research column.

View research-associated orders in Chart Review

Open Chart Review for a patient enrolled in your research study.

An icon appears next to orders, medications, and procedures associated with a research study.

Order Preference Lists

Organizing your preference list effectively can help you place orders more quickly. You can create sections to group orders you often place at the same time, add the orders you write most frequently with the exact details you need, and edit the display names so the orders are easier to find. After your preference list is set up, you can browse through the orders and select the ones you need for your patient. Consider creating study-specific sections or copy your preference list from a colleague.

Create preference list sections

For efficient preference list setup, first create the sections that are most useful to you, such as grouping by study or study visit. Then, when you place a commonly-used order, save it as a favorite and add it to the correct section in your preference list.

1. Use Chart Search to open the **Preference List Composer**.
2. In the list that appears, double-click your outpatient or inpatient orders preference list. The list is called "<your name> ORDERS PREFERENCE OP" or "<your name> ORDERS PREFERENCE IP."
- It's important to choose the orders preference list because when you place an order and save it as a favorite, the order is automatically added to this list.
3. Click New Section.
- Create sections that are appropriate for your studies and that group orders you often place at the same time.
- Enter a display name that makes sense to you.
- Indicate whether you want orders in this section to appear alphabetically when browsing the list.
4. To add a subsection, select the section it should appear under and click **New Subsection**.
- Add subsections that group orders appropriately for your study. For example, you might add subsections for meds, labs, and imaging for each study, or choose to group all orders for a particular study visit into a single subsection.
- Reorganize the sections and subsections in your preference list by dragging and dropping them or by using the and buttons in the bottom left.
5. Click in the upper-right corner when you're finished adding sections.

Add orders to your preference list

To start out, save your most common orders to your preference list. Then, add more as needed.

1. Look up an order and edit the details as usual.
2. Before pending the order, hover over it and click to add it to your preference list.
3. In the **Display name** field, enter an easy-to-remember name for the order. The next time you need to place this order, you can search for your saved order using this name.
4. In the **Section** field, enter the section of your preference list in which you want this order to appear. Or, click **New Section** to add another section to your list.
- If you don't specify a section, the order will appear in the My Favorites section.
- Consider creating study- or visit-specific sections to group orders meaningfully.
5. Enter any other details you want to use when you place this order in the future, such as instructions or answers to questions. These details appear only for you, and you can always update them later.
6. Click **Accept** and indicate whether you want to use the details you entered in step 5 for the current patient.

> Consider adding the same order to your preference list more than once with different display names and order details. For example, you might have one entry called "EKG IRB 100 – Screening Visit" and another called "EKG IRB 100 – Visit 1" if the required order details, such as performing department, will differ between the two.

Edit your preference list

After you add an order to your preference list, you might want to move it to a different section, or you might change your mind about the details you specified. In the Preference List Composer, you can edit order details and remove orders that you no longer use.

1. Use Chart Search to open the **Preference List Composer**.
2. In the list that appears, double-click your inpatient orders preference list. The list is called "<your name> ORDERS PREFERENCE IP."
3. Select the section or subsection that contains the order you want to edit.
    - To move an order to a different section, click the order and drag and drop it into another section.
    - To modify order details, such as frequency or display name, double-click the order's name.
    - To change the name of a section or subsection, click **Properties**.
4. When you're finished making changes, click in the upper-right corner.

Copy preference lists from other clinicians

To save time creating a preference list, you can copy the lists that your colleagues have created for certain types of orders. Sharing and copying preference lists between clinicians also helps spread experience and expertise among your colleagues.

1. Use Chart Search to open the **Preference List Composer**.
2. At the bottom of the screen, click **Copy User.**
3. In the **From user** field, enter the name of the user whose preference list you want to copy.
4. Verify that your name appears in the **To user** field.
5. Select a copy option.

- If you want to add the other user's entire list to your existing list, select **Merge**. This might result in duplicate orders.
- To completely replace your list with the other user's list, select **Replace**.

6. Select the check boxes for the types of lists you want to copy.

- The columns under your name and your colleague's name show how many orders are on each of your preference lists.
- To see the orders on your colleague's list, double-click the number of items on their list.

7. Click **Copy**.
8. A confirmation window appears. Edits you make in the new list do not affect your colleague's list.

Browse your preference list and select orders

To browse your updated preference list, click **New** in the Orders activity or in the visit taskbar. Then select the orders you need from the list.

1. To see only your personal preference list entries, select the **Only Favorites** check box at the top left of the **Browse** tab.
2. To change the order details you saved, such as the display name or dose, right-click the order in the Preference List Browser.

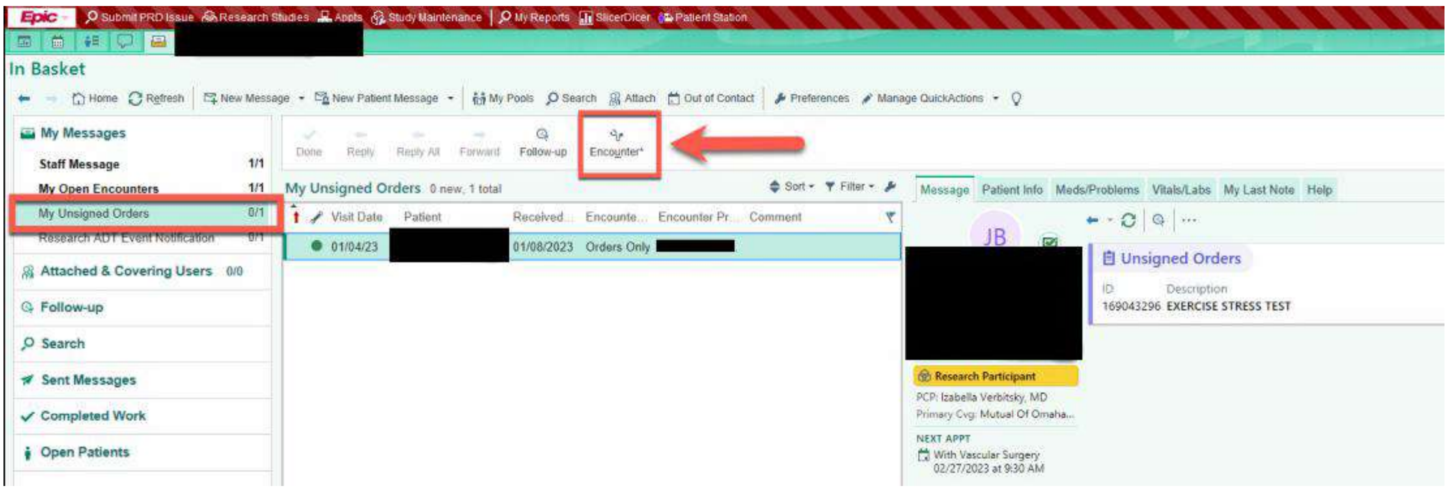
3. To change the appearance of your preference lists, click at the top right of the **Browse** tab. You can choose:

- The number of columns in which orders appear.
- Whether the sections that you created appear in alphabetical order or in the order you created them.

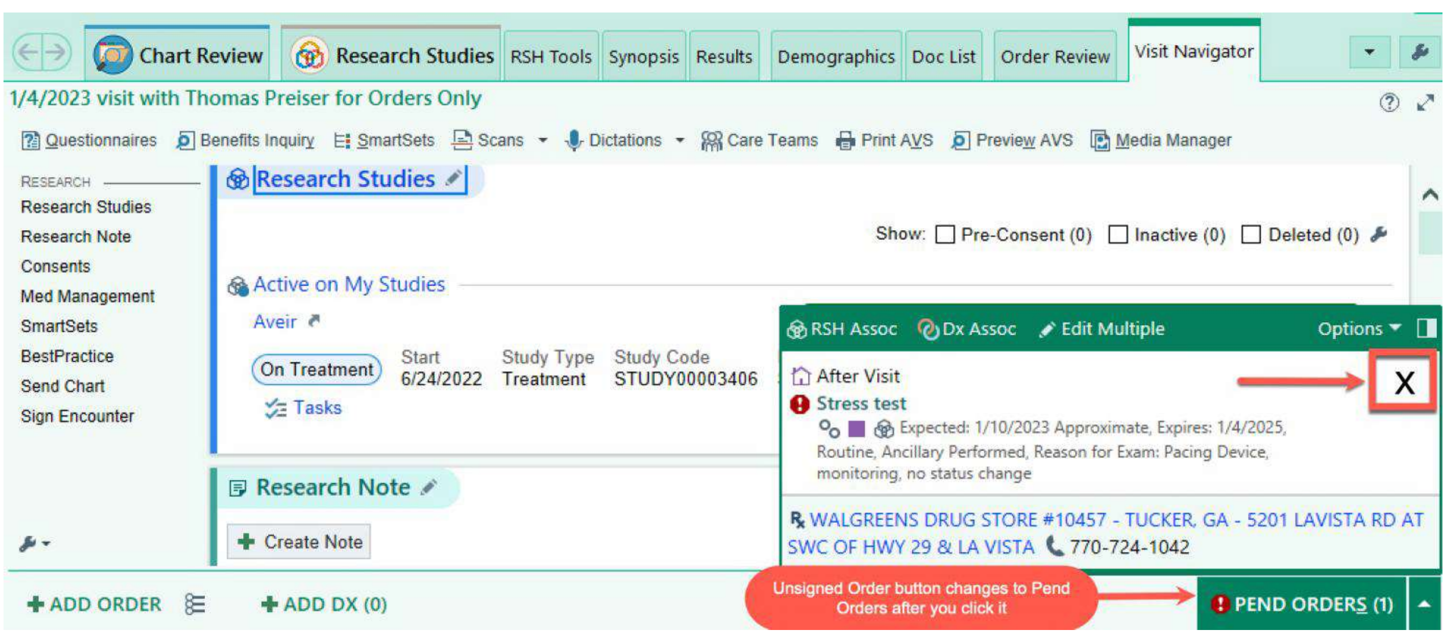
Cancel Unsigned Orders

Coordinators may need to cancel orders that are pending signature from a provider.

1. Open InBasket and select the message from your Unsigned Orders folder.
2. Click Encounter (this opens the orders only encounter you created)



3. Click on the Unsigned Order button in the lower right-hand corner.
4. Hover over the order and click the X to cancel the pended order.



Cancel Signed Orders

Future orders that have been signed by a provider can only be canceled by the provider prior to an arrived visit. Licensed personel, such as nurses & phlebotomists, can cancel orders from within a visit that has been started. Unlicensed research coordinators cannot cancel signed orders.

Providers:

1. Open the encounter with the order(s).
2. Click the clipboard icon in the bottom right hand corner to open the orders.
3. Click the pencil to edit the order or click the X to cancel the order.

Licensed Personel:

1. Open the encounter and start the visit (patient should be present & checked in).
2. Navigate to Order Inquiry and run All Lab Orders report.
3. Select the order and click Cancel button.