

# Research ID Med Orders *Training Materials*

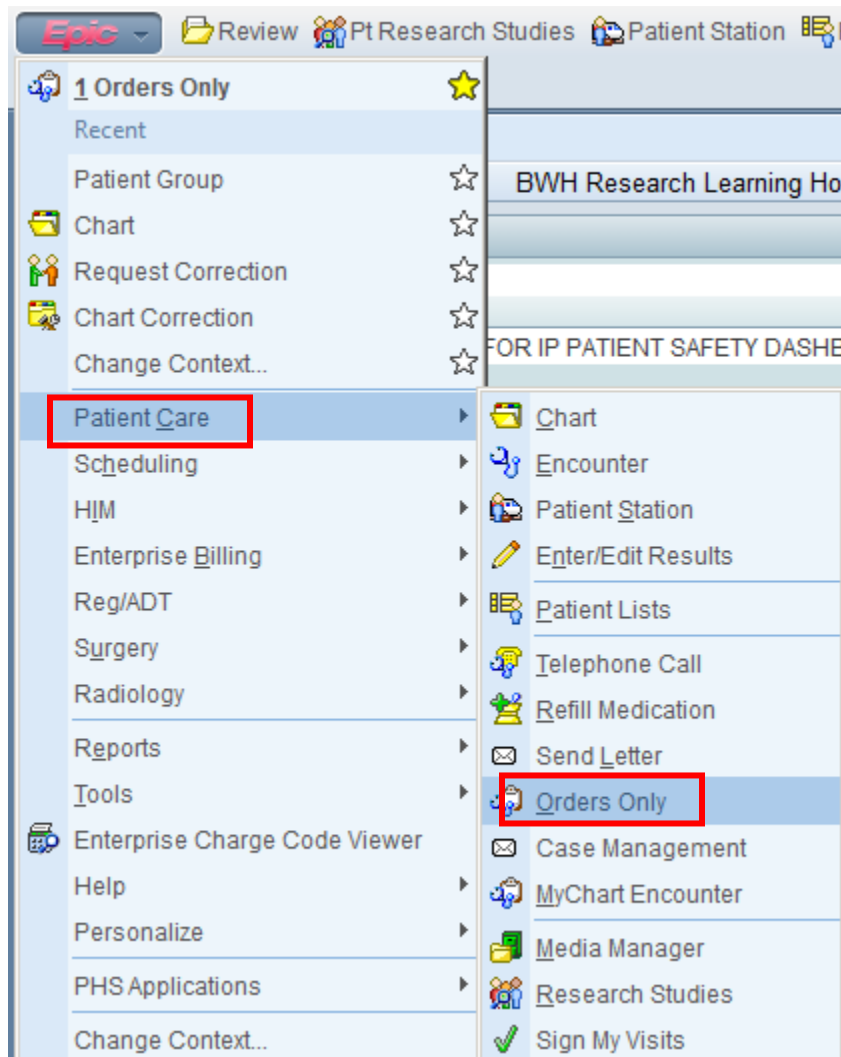
Orders for investigational medications can be entered by the study coordinator and co-signed by the ordering provider. (If the order is an inpatient medication it must be entered by the ordering provider or other credentialed clinical user.)

This Tip sheet will cover:

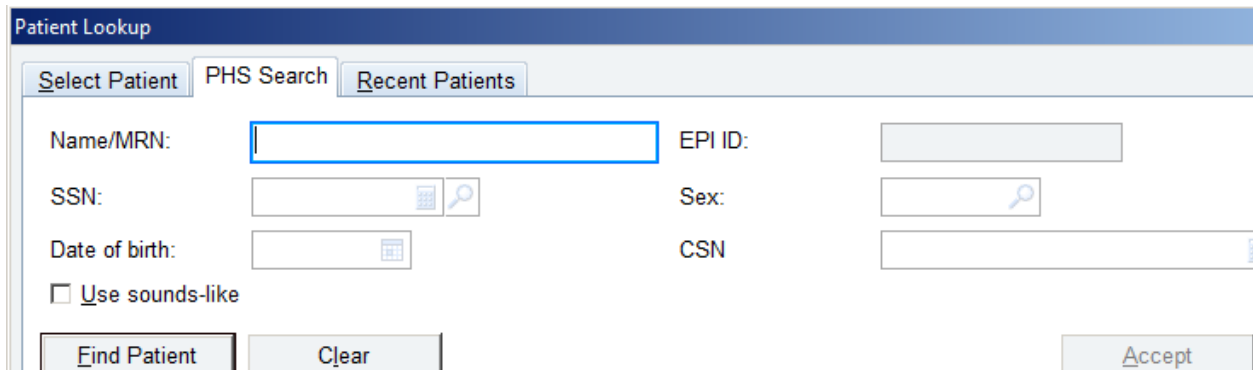
1. How coordinator will create an “Orders Only” encounter.
2. How order to be signed displays in Provider In Basket

## 1. Creating an Orders Only encounter

1. From the Epic button drop down, click Patient Care ----> Orders Only
2. [Note that if you save “Orders Only” as a Favorite, it will remain at top of your list (see 1)]

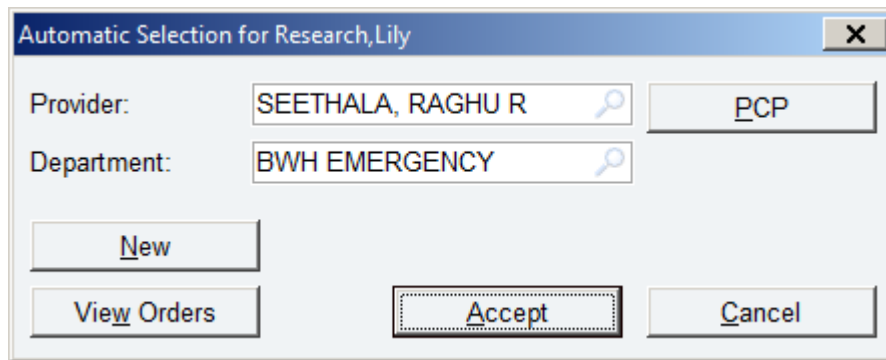


3. You will be prompted to Select the patient (Check your Recent or enter MRN)



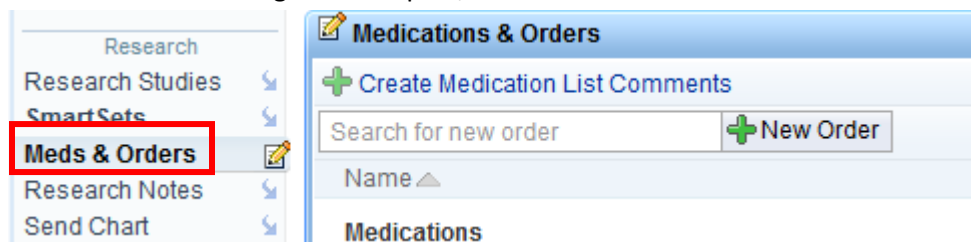
The 'Patient Lookup' dialog box has three tabs: 'Select Patient', 'PHS Search', and 'Recent Patients'. The 'Select Patient' tab is active. It contains input fields for 'Name/MRN:', 'SSN:', 'Date of birth:', 'EPI ID:', 'Sex:', and 'CSN:'. There are also checkboxes for 'Use sounds-like'. At the bottom, there are buttons for 'Find Patient', 'Clear', and 'Accept'.

4. You will be prompted to enter Provider and Department. Click Accept



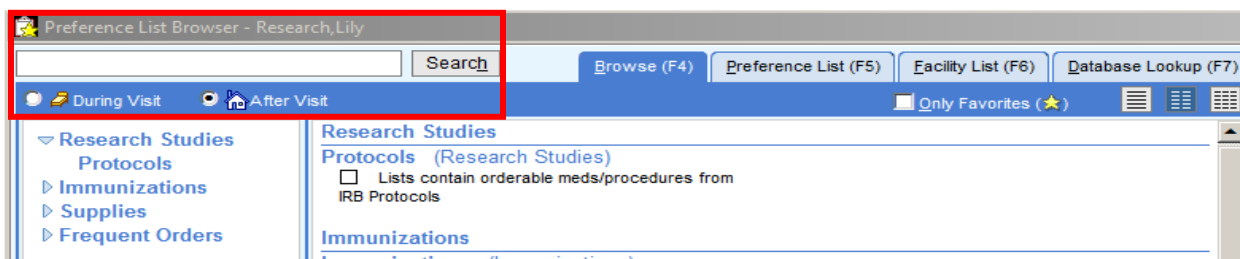
The 'Automatic Selection for Research, Lily' dialog box has a title bar with a close button. It contains input fields for 'Provider:' (with 'SEETHALA, RAGHU R' entered) and 'Department:' (with 'BWH EMERGENCY' entered). There is a 'PCP' button next to the provider field. At the bottom, there are buttons for 'New', 'View Orders', 'Accept', and 'Cancel'.

5. The chart and visit navigator will open , click **Meds & Orders**



The 'Medications & Orders' panel is shown. On the left, a sidebar lists 'Research Studies', 'Smart Sets', 'Meds & Orders' (highlighted with a red box), 'Research Notes', and 'Send Chart'. The main area of the panel has a title 'Medications & Orders', a '+ Create Medication List Comments' button, a search box with 'Search for new order' and a '+ New Order' button, and a 'Name' dropdown menu. Below these are sections for 'Medications' and 'Orders'.

6. Click **+ New Order** and see Search box. NOTE BENE: Below box there are 2 options.
- During Visit** with a Bed icon – this is checked if ordering a med to be administered during the patient visit and Nursing will need to document on the MAR
  - After Visit** with a House icon – this is checked if ordering an outpatient prescription that will be given to the patient by study staff



The 'Preference List Browser - Research, Lily' dialog box has a title bar. It contains a search box with a 'Search' button. Below the search box are two radio buttons: 'During Visit' (selected) and 'After Visit'. At the bottom, there are sections for 'Research Studies' (with 'Protocols (Research Studies)' and 'Immunizations (Immunizations)') and 'Frequent Orders'.

7. “**During Visit**” med order - Type in the ID med name, IRB protocol number, or CRC number to find the med on the Facility list.  
(If it is not found, call the Help Desk to open ticket to report med missing from Facility List)

Facility List Search - Research, Lily

id-arginine

☒ During Visit ☐ After Visit ☒ Medications ☒ Procedures ☐ Order Panels ☐ Split

Name	Type	Dos	Route	Freq	Pref List	Co
ID-arginine (CRC 1166//2014P001680) injection 10%	Medication				MGH OP	

- 6b. “**After Visit**” med order – Type in the ID med name, IRB protocol number, or CRC number to find the med.

8. Select your order and click **Accept**.
9. This will open the Order Details. Fill out any needed information indicated by and click **Accept**.
10. Click the **Research Association** button before filing

Click here to select a pharmacy

☒ Associate ☒ Research Association

11. Indicate which study this order should be associated to and click **Accept**

Order -- Associate Research Studies

Research, Lily

ZZ Acute Coronary Syndrome CE...  
RSH ONCOLOGY TEST III DFCI A...  
Research Study

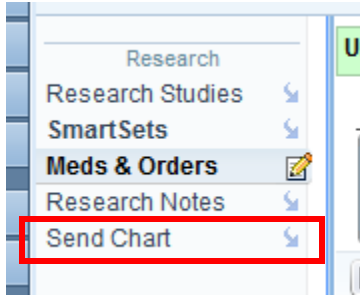
ID-oseltamivir/ ribavirin/ amantadine/ plac... ☒ ☐ ☐

- a. You will then see the beaker next to the order you just associated.

12. Click **Pend** (since you do not have signing privileges for medications (Must be an MD)

- a. If you click **Pend**, the orders will sit on the chart until someone else takes action to sign them (you will need to notify the authorizing provider to sign them in order for them to be actionable).

13. After med is **Pended** , Click **Send Chart** in the navigator. (This will send the chart via InBasket)

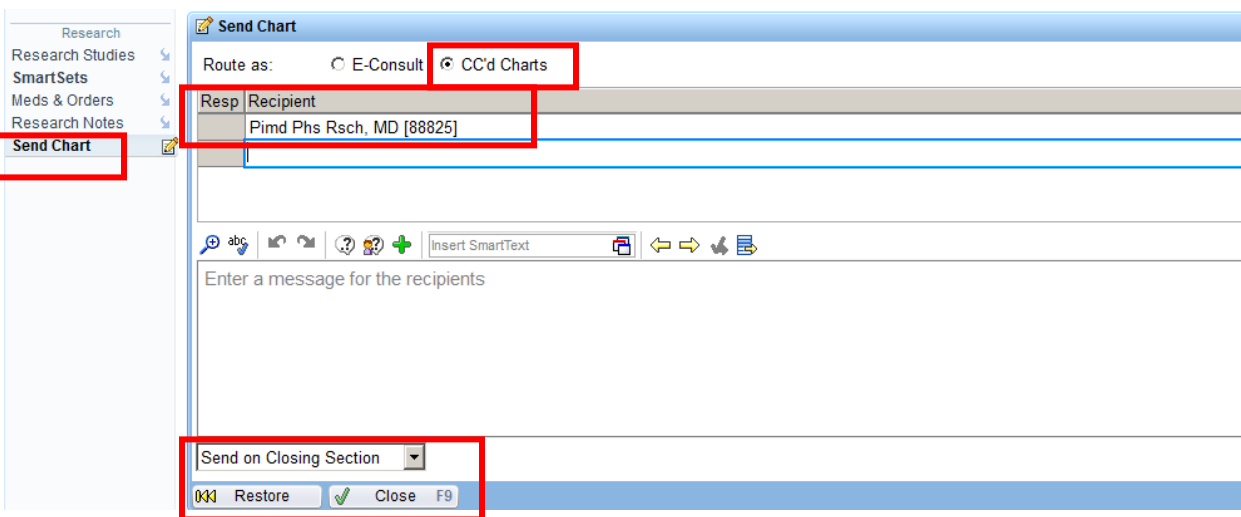


14. At the **Route As** prompt: Make sure **CC'd Chart** is checked

15. Enter the authorized provider's name as the recipient.

16. When you click **Close** the chart will be sent to the provider.

- a. It is best to also page the provider that orders to be signed are sent to In Basket



## Notes:

- **Signing orders** can be done by study coordinators for all orders other than medications
- **Pending orders** is used when study staff enter medication orders and do not have signing privileges as non-licensed staff.
- If orders are pended you cannot act of them until the PI/MD signs the orders in Epic.
- Page or notify the PI or CoI that orders have been sent to **In Basket**

Continue to next page for In Basket screen shot -->

## 2. Provider In Basket for Signing

1. Log into Epic and click **In Basket** (In Toolbar, usually 2<sup>nd</sup> option)
2. Click **CC'd Charts** to find orders needing to be signed

The screenshot shows the Epic In Basket interface. The 'In Basket' toolbar is at the top. On the left sidebar, 'CC'd Charts' is highlighted. The main area displays a list of CC'd Charts with columns for Status, Signed On, Encounter Type, and Visit. The first chart is for Patient: Research, Lily [7009382], Age: 35 y.o., with a visit on 02/06/2016. Below this, there are three more charts for different patients. On the right, the 'Requested Medications' section shows a prescription for ID-oseltamivir/ ribavirin/ amantadine/ placebo. At the bottom right, the 'Unsigned Orders' section is highlighted, showing a table with columns for ID, Description, and Pended By.

ID	Description	Pended By
1918365	ID-oseltamivir/ ribavirin/ amantadine/ placebo (2014P001873) 75/200/100/0 mg capsule-2 times daily	Study Staff Two Bwh/F Phs Rsch

3. Double click the Patient chart and it will open
4. Go to Unsigned Orders and click Sign

**Unsigned Orders** new orders, reorders, and modifications

After Visit Medications (1 Order)

ID-oseltamivir/ ribavirin/ amantadine/ placebo (2014P001873) 75/200/100/0 mg capsule



Remove



Take 5 capsules by mouth 2 (two) times a day.

Normal, Disp-50 capsule, R-0

Please include the Medication Kit number in the order



This medication will not be e-prescribed. Invalid items: Provider Details

Mark All Taking

Mark as Reviewed

Last Reviewed by Stefanie Michael, RN on 1/11/2016 at 1:53 PM

Click here to select a pharmacy

Associate

Research Association

Edit Multiple

Phases of Care

Providers

Order Entry

Sign

Pend

Associated Diagnoses

click to open