

ELECTRONIC ORDERS – SAFETRACE TX

- | | | |
|---|---|--|
| <input checked="" type="checkbox"/> St. Joseph Medical Center, Tacoma, WA | <input checked="" type="checkbox"/> St. Anthony Hospital Gig Harbor, WA | <input type="checkbox"/> Harrison Medical Center, Bremerton, WA |
| <input checked="" type="checkbox"/> St. Francis Hospital, Federal Way, WA | <input checked="" type="checkbox"/> St. Elizabeth Hospital Enumclaw, WA | <input type="checkbox"/> Harrison Medical Center, Silverdale, WA |
| <input checked="" type="checkbox"/> St. Clare Hospital Lakewood, WA | <input type="checkbox"/> Highline Medical Center Burien, WA | <input type="checkbox"/> PSC |

PURPOSE

To describe the method whereby electronic orders are seen and brought into the patient profile.

BACKGROUND

Testing and component orders are created in Epic by the patient provider. These orders are visible in the electronic orders found in the little “e” button on the top horizontal toolbar and can be searched:

- For specific individuals – by entering patient medical record number. Click **Query**.
- For all patients from a particular hospital service provider – by entering the name of the hospital. Click **Query**
- For all patients from all hospitals by simply clicking **Query**.

RELATED DOCUMENTS

- | | |
|-------------|---|
| M-W-TS-0343 | Opening a Patient / Bringing in a New Patient |
| M-W-TS-0330 | Patient Visit Management |

STEPS

This information applies to all sites as follows.

- *SJMC handles orders for Prepare RBCs*
- *Each site handles its own orders for FFP, Cryoprecipitate, Platelets, and RhIG*

Locate the pending Electronic Order(s)

1. There are two ways to access this information.
 - From the top drop down menu, select **Orders > Pending Electronic** or
 - Click on the little “e” icon from the top of the window
2. In the **Pending Electronic Orders window**, you may narrow the search by entering:
 - Patient medical record number
 - Service provider – which will pull all pending orders associated with one specific hospital
 - Query – which will pull all pending orders from all hospitals in the system
3. If found, pending **electronic orders** will display in the **Pending Electronic Orders grid** in the screenshot below.
 - Note the CSN # (also known as External Visit Number) in the little “e” and write it down
 - Click on the “X” to close the window.

Pending Electronic Orders

Service Provider:

MR No: 1001505367 s c X a d aby A Pos r h l His

Pending Electronic Orders				
Provider ID	MR No	Patient ID		
SJMC	St. Joseph Medical C	1001505367	1554555	SAFETRACE, IPFEMALE

Order Items					
Provider Serv	Item Type	Item ID	External Visit No	Account #	
893	TRANSFUSION REA	Test battery	HISTORY CHECK	200100324400	20010032
893	TRANSFUSION REA	Test battery	TRXN RXN INITIAL	200100324400	20010032
893	TRANSFUSION REA	Test battery	TRXN RXN INITIAL	200100336254	20010033

Buttons: OK, Cancel, Find..., Query, Reject..., Forward..., Notes...

Attaching the Electronic Order & Specimen to the Patient – For SJMC only

1. With the correct Patient Profile open, select **Patient > Record Specimen**. The Record Specimen window opens.
2. Click the **Electronic** button in the menu at the right of the **Record Specimen Screen** and click Query. The Electronic Specimen window opens. If the specimen has been created, it will appear in the **Specimens in Holding** grid in the **Electronic Specimen** window. Click on the electronic specimen and then **click OK**.
3. The specimen will be pulled in and attached to the patient. The expiration date can be seen by clicking first the **ABORH** button and then the **Specimen Expiration** button in the **Patient-at-a-Glance-Bar**.
4. The **orders** will have crossed over with the specimen and will be found in the **Patient Profile Tests** tab. They will also be found in the **Pending Worklog (PW)**.

Checking for the Correct Patient Visit

1. Open the **Patient Profile** and enter the patient name – or the first few letters of the first/last names
2. Click **Query** to see the options and select the correct patient. Click **OK** to populate the Patient Profile window.
3. **Check the Displayed Patient Profile for presence of:**
 - Current admission date
 - Discharge Date box must be empty
 - Do **NOT** select a patient visit with a discharged account as patient billing is tied to an active account.
 - If a Discharged Date is present, a new visit must be created for the patient.
 - CSN (account #) – does it match the CSN in the little “e”?
 - **If yes, you are finished. Leave the Patient Profile open and begin your work.**
 - **If no, you must create a new visit. Go to Step 4.**

1554555: SAFETRACE, IPFEMALE

Patient ID: 1554555 Status: A Active Merged to ID:

Name
Last: SAFETRACE First: IPFEMALE Middle: Prefix: Suffix:

HC#: Enterprise ID: Converted: N

s c X a d aby A Pos r h i His

General Comments Extended Typings Special Needs TxRx Specimen Tests

SSN: Ethnicity: I Caucasian Mother's PID:

Birth Date: 01/01/1990 Gender: F Female Center ID: SJMC No of Pregnancies:

Current Visit Information
Admission Date: 10/13/2016 Visit Type: I Inpatient visit Discharge Date:
Service Provider: SJMC St. Joseph Medical Center MR No: 1001505367
Admit. Physician: Patient Location: SJMC - SJMC7TH-TES
Payer Provider: SJMC St. Joseph Medical Center Account No: 200100324400

ID	Start Date	End Date	Comment
*	02/14/2017		

4. If a current CSN # (as in the little "e") is not available, leave the patient profile open and **create a new visit** by selecting: **File > New > Visit**.
 - The **New Patient Visit** box will appear.

Patient/Order - Validation

File Edit Patient Orders WorkLog Results Product Utilities Options Window Help

1554555: SAFETRACE, IPFEMALE

Patient ID: 1554555 Status: A Active Merged to ID:

Name
Last: SAFETRACE First: IPFEMALE Middle: Prefix: Suffix:

HC#: Enterprise ID: Converted: N

s c X a d aby A Pos r h i His

General Comments Extended Typings Special Needs TxRx Specimen Tests

SSN: Ethnicity: I Caucasian Mother's PID:

Birth Date: 01/01/1990 Gender: F Female Center ID: SJMC No of Pregnancies:

Current Visit Information
Admission Date: 10/13/2016 Visit Type: I Inpatient visit Discharge Date:

New Patient Visit

Patient ID: 1554555 SAFETRACE, IPFEMALE

Current Visit Information
Admission Date: Visit Type: Discharge Date:
Service Provider: MR No:
Admit. Physician: Location: -
Payer Provider: Account No:
Diagnosis:

OK
Cancel
Find...
ADT Visit...

- Click on the **ADT Visit** button to see all current visits in **ADT Visit Holding** window.

ADT Visit Holding

Patient ID: 1554555 SAFETRACE, IPFEMALE

ADT Visit					
Service Provider ID	MR No	Visit Number	Account No	Admission Date	Disc
SJMC	1001505367	200100336254	200100336254		
SJMC	1001505367	200100343911	200100343911		
SJMC	1001505367	200100336343	200100336343		

ADT Visit Provider

Provider Role	Provider ID

OK
Cancel

5. Highlight the Account # (CSN) that matches with the order. Click **OK**.
6. ADT patient data will be pulled into these fields to complete. Click **OK**.

New Patient Visit

Patient ID: 1554555 SAFETRACE, IPFEMALE

Current Visit Information

Admission Date: Visit Type: Outpatient visit Discharge Date:

Service Provider: SJMC St. Joseph Medical Center MR No: 1001505367

Admit Physician: Location: SJMC - SJMCLAB

Payer Provider: SJMC St. Joseph Medical Center Account No: 200100336254

Diagnosis:

OK
Cancel
Find...
ADI Visit...

- Verify that the correct Account # is displaying in the Patient profile. You are ready to assign product(s) to the patient (all sites) - or do testing (SJMC).

1554555: SAFETRACE, IPFEMALE

Patient ID: 1554555 Status: Active Merged to ID:

Name
Last: SAFETRACE First: IPFEMALE Middle: Prefix: Suffix:

HC#: Enterprise ID: Converted: N

General | Comments | Extended Typings | Special Needs | TxRx | Specimen | Tests

SSN: Ethnicity: Caucasian Mother's PID:

Birth Date: 01/01/1990 Gender: Female Center ID: SJMC No of Pregnancies:

Current Visit Information

Admission Date: 03/08/2017 Visit Type: Outpatient visit Discharge Date:

Service Provider: SJMC St. Joseph Medical Center MR No: 1001505367

Admit Physician: Patient Location: SJMC - SJMCLAB

Payer Provider: SJMC St. Joseph Medical Center Account No: 200100336254

Patient Visit Diagnosis

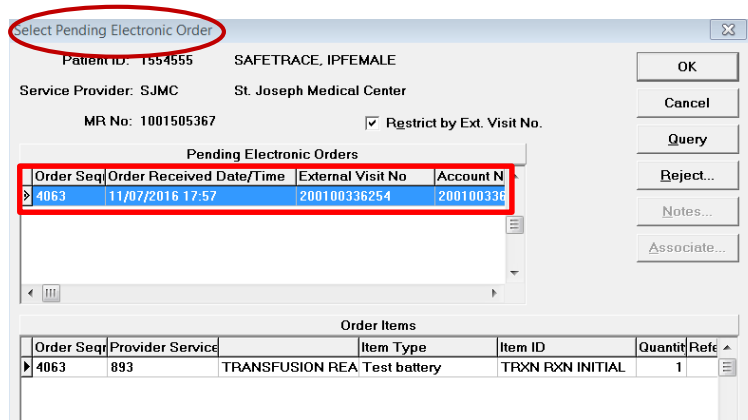
ID	Start Date	End Date	Comment
*	03/08/2017		

Filling an Electronic Order that will not automatically cross over the patient from "e" for Testing

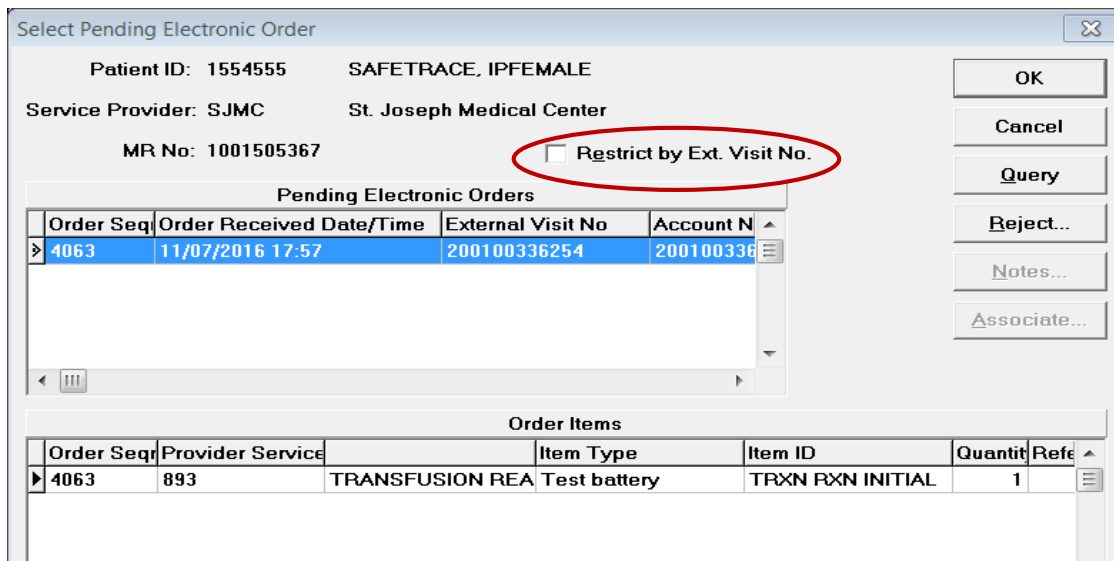
These steps are only necessary when Epic orders placed by hospital staff are visible in the little “e” but **cannot be brought into the application** through the automatic order process and applies as follows:

- *SJMC for testing orders*
- *All sites when product orders refuse to cross into the pending worklog*

1. With the **Patient Profile** open, select **File > New > Order > Regular**
2. The **New Order window** will open. Click **OK** to close this window.
3. The **Order window** will open. Select **Orders > Add Electronic Orders** from the top menu bar
4. On the **Select Pending Electronic Order window**, highlight the Pending Electronic order and click the **OK** button.



5. If for some reason, the order still will not come in, uncheck the “Restrict by Ext. Visit No.” box and try again.



6. On the **Order window**, the selected electronic order items will now display in the **Items grid**. Enter a Time for each order item and save. The status is updated for each order item on the Order Profile.
7. **Save** the order.
8. Check the **PW** for the patient and continue with product selection or testing.

REFERENCES

AABB Standards for Blood Banks and Transfusion Services, current edition

AABB Technical Manual, current edition