CHI Franciscan Health
Our best care. Your best health.℠

ELECTRONIC ORDERS – SAFETRACE TX

☒ St. Joseph Medical Center, Tacoma, WA   ☒ St. Anthony Hospital Gig Harbor, WA   ☐ Harrison Medical Center, Bremerton, WA
☒ St. Francis Hospital, Federal Way, WA   ☒ St. Elizabeth Hospital Enumclaw, WA   ☐ Harrison Medical Center, Silverdale, WA
☒ St. Clare Hospital Lakewood, WA   ☐ Highline Medical Center Burien, WA   ☐ 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.

Attaching the Electronic Order & Specimen to the Patient – <u>For SJMC only</u>

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 <u>NOT</u> 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 <u>must</u> be created for the patient.

   - CSN (account #) – does it match the CSN in the little "e"?
     - **If <u>yes</u>, you are finished. Leave the Patient Profile open and begin your work.**
     - **If <u>no</u>, you must create a new visit. Go to Step 4.**

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.

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

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**.

- 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).

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.
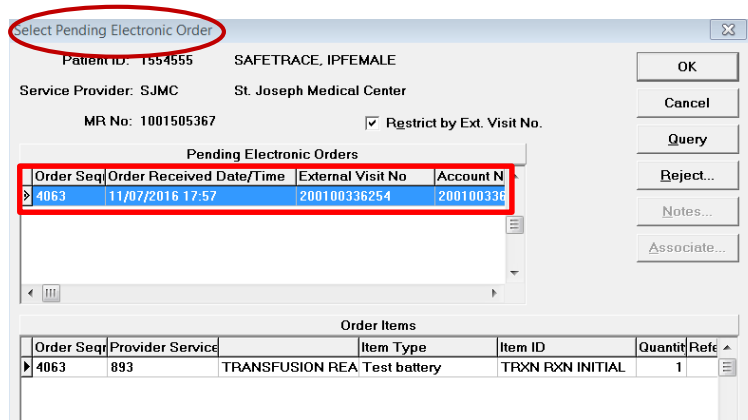
5. If for some reason, the order still will not come in, uncheck the "Restrict by Ext. Visit No." box and try again.
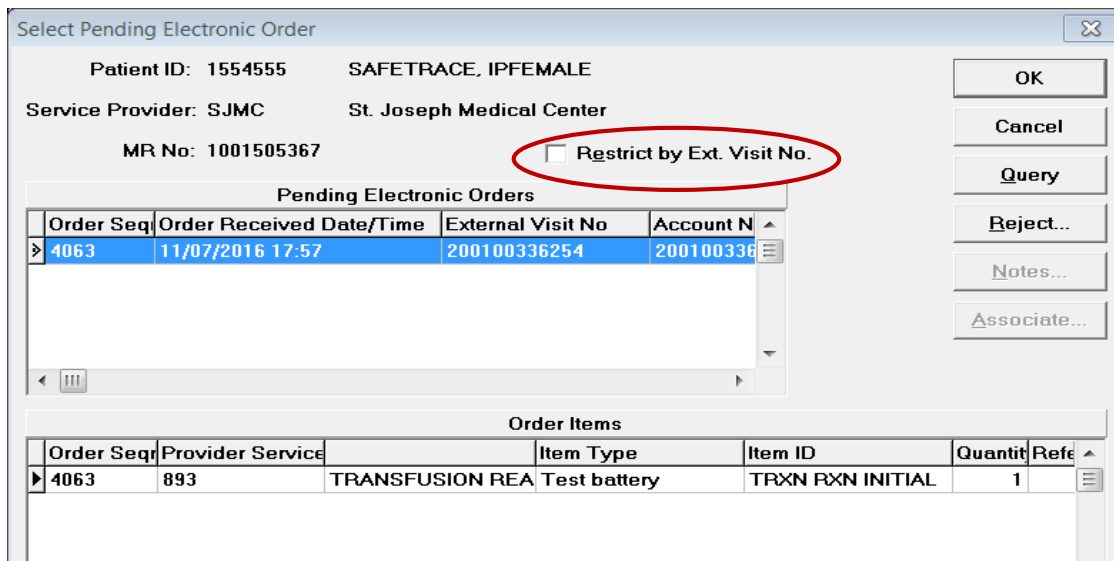
6. On the **Order window**, the selected electronic order items will now display in the **Items grid**. Enter a Time for each order item and save. The status is updated for each order item on the Order Profile.

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