

Our best care. Your best health."

WORK INSTRUCTION

M-W-TS-0333-00

ELECTRONIC ORDERS – SAFETRACE TX

⊠ St. Joseph Medical Center, Tacoma, WA ⊠ St. Francis Hospital, Federal Way, WA

St. Clare Hospital Lakewood, WA

☑ St. Anthony Hospital Gig Harbor, WA
 ☑ St. Elizabeth Hospital Enumclaw, WA
 ☑ Highline Medical Center Burien, WA

Harrison Medical Center, Bremerton, WA
 Harrison Medical Center, Silverdale, 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-0343Opening a Patient / Bringing in a New PatientM-W-TS-0330Patient 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.

P:\Transfusion Service History-Archived\Electronic Orders - SafeTrace Tx-00.docx	Effective Date: 7/21/17	Page 1 of 6
Unauthorized use or copying of this document is prohibite	d by FHS.	

ervice Provid	er:							ОК
<u>M</u> R N	lo: 1001505367	S	c X a	d aby APos		r	h I His	Cancel
		Pendir	ng Electroni	ic Orders				Eind
Provider IE	N	R No	Patient ID				*	
SJMC S	t. Joseph Medical C1	001505367	1554555	SAFETRACE IPE	EMALE			Querv
				OVALETTO OL, ITT	LINALL			
	· ·			5/4 2110/02, 111			=	Reject
	· · · · ·			GATE HVIOL, IT			=	<u>R</u> eject
					LINALL			<u>R</u> eject. For <u>w</u> ard
				0/4 E 110/0E, 11			-	<u>R</u> eject. For <u>w</u> ard
				Drife Freide, in F			-	Reject Forward
			Order Item	15		•	-	Reject
Provider Se	v	Item Type	Order Item	is em ID	Externa	I Visit No	Account f	Reject. Forward
Provider Sei 893	V TRANSFUSION RE	Item Type	Order Item Ite	ns em ID ISTORY CHECK	Externa 2001003	I Visit No 324400	Account ^ 20010032 =	<u>R</u> eject. For <u>w</u> ard
Provider Sei 893 893	V TRANSFUSION RE TRANSFUSION RE	Item Type A Test battery A Test battery	Order Item Ite HIte	IS ISTORY CHECK RXN RXN INITIAL	Externa 200100: 200100:	I Visit No 324400 324400	Account I ^ 20010032	Reject.

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 <u>NOT</u> select a patient visit with a discharged account as patient billing is tied to an active account.
 - o 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>ves</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.

P:\Transfusion Service History-Archived\Electronic Orders - SafeTrace Tx-00.docx	Effective Date: 7/21/17	Page 2 of 6
Unauthorized use or copying of this document is prohibite	d by FHS.	

1554555: SAFETRACE, IPFEMALE				- • ×.
Patient ID: 1554555 Status:	A 🗸 Active	M	erged to ID:	
Name Last: SAFETRACE	First: IPFEMALE	Middle	Prefi <u>x</u> :	▼ Suffix:
	Enterpr <u>i</u> se ID:		Converted: N	
s c X a d aby APos	r	h I His		
General Comments Extended Ty	pings Special Nee	eds TxRx Spec	imen Tests	
SSN: Ethnic	ity: 1 💌 Caucas	sian Mo	ther's PID:	
Birth Date: 01/01/1990 Geno	ler: F 💌 Female	9	Center ID: SJMC No of P	regnan <u>c</u> ies:
Current Visit Information				
Admission Date: 10/13/2016	Visit Type: 📔 🔻	Inpatient visit	Discharge Date:	•
Service Provider: SJMC	St. Joseph Medical	Center	MR <u>N</u> o: 1001505367	
Admit. Physician:			Patient Location: SJMC - SJ	MC7TH-TES
Payer Provider: SJMC	St. Joseph Medical	Center	Account No: 200100324400	>
		Patient Visit Diagn	osis	
ID	Start Date	End Date	Comment	<u>^</u>
×	02/14/2017			
				Ψ.

- 4. If a current CSN # (as in the little "e") is <u>not</u> 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 Work	Loa Results Product Utilitie:	s Options Window Hel	p	
		PW PS RE CM	DTB BOT WS MY	W QW e OP
1554555: SAFETRACE, IPFEMA	.E			
Patient ID: 1554555 State	us: A 💌 Active	Merged to ID:		
Name Last: SAFETRACE	First: IPFEMALE	<u>M</u> iddle:	Prefi <u>x</u> :	Suffix:
HC#: s c X a d aby AP	Enterpr <u>i</u> se ID:	Converted:	Ν	
General Comments Extended SSN: Eth	Typings Special Needs Txf nicity: 1 💌 Caucasian	Pox Specimen Tests*		
Birth Date: 01/01/1990 G Current Visit Information	ender: F 💌 Female Visit Type: I 💌 Inpatier	Center ID: SJ	MC No of Preg	jnan <u>c</u> ies:
lew Patient Visit	True () have a set of a set o	Discharge I	Juie.	
Patient ID: 1554555 SAFETR	ACE, IPFEMALE			ОК
Current Visit Information	⊻isit Type: ▼	D <u>i</u> scharge Da	ate:	Cancel
Service Provider:		MBI	No:	Eind
Ad <u>m</u> it. Physician:		Locati	on: =	
Payer Provider:		A <u>c</u> count N	10:	
<u>D</u> iagnosis:				

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

P:\Transfusion Service History-Archived\Electronic Orders - SafeTrace Tx-00.docx	Effective Date: 7/21/17	Page 3 of 6
Unauthorized use or copying of this document is prohibite	d by FHS.	

AC	T Visit Holding							8
Ρ	atient ID: 1554555	SAFETRACE	, IPFEMALE				$\boldsymbol{<}$	ОК
			ADT Visit					Cancel
Г	Service Provider II	MR No	Visit Number	Account No	Admission Date	Disc		
┣	SJMC	1001505367	200100336254	200100336254			Ξ	
	SJMC	1001505367	200100343911	200100343911				
	SJMC	1001505367	200100336343	200100336343				
							Ŧ	
1	111					•		
			ADT Visit Provide	er				
	Provider Role F	Provider ID					*	
							Ξ	

- 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 SAFET	RACE, IPFEMALE		ОК
Current Visit Information	Visit Type: O 🗸 Outpatient visit	Discharge Date:	Cancel
Service Provider: SJMC Admit. Physician:	St. Joseph Medical Center	M <u>R</u> No: 1001505367 Location: SJMC - SJMCLAB	AD <u>T</u> Visit
Payer Provider: SJMC	St. Joseph Medical Center	A <u>c</u> count to: 200100336254	

• 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).

Patient ID: 1554555 Status: A Active Merged to ID: Name Last: SAFETRACE First: IPFEMALE Middle: Prefix: IP Suffix: HC#: Enterprise ID: Converted: N Suffix: IPE HC#: Enterprise ID: Converted: N Suffix: IPE General Converted: N Suffix: IPE Suffix: IPE Birth Date: II/01/1990 Gender: F Female Center ID: SJMC No of Pregnangies: Current Visit Information Admission Date: 13/08/2017 Yisit Type: O utpatient visit Discharge Date: I001505367 Admit: Physician: Patient Location: SJMC St. Joseph Medical Center ACcount N 200100336254	
Patient ID: 1554555 Status: ▲ Active Merged to ID: Name Last: SAFETRACE First: IPFEMALE Middle: Prefix: Suffix: . HC#: Enterprise ID: Converted: N S c X a d aby APos r h 1 His General Comments Extended Typings Special Needs TxRx Specimen Tests SSN: - Ethnicity: 1 Caucasian Mother's PID: . Birth Date: 01/01/1990 Gender: F Female Center ID: SJMC No of Pregnancies: Current Visit Information Admission Date: 0.3/08/2017 Yisit Type: 0 . Outpatient visit Discharge Date: . Service Provider: SJMC St. Joseph Medical Center MR No: 1001505367 Admit. Physician:	1554555: SAFETRACE, IPFEMALE
Name Last: SAFETRACE First: IPFEMALE Middle: Prefix: Suffix: HC#: Enterprise ID: Converted: N s c X a d aby APos r h 1 His General Comments Extended Typings Special Needs TxRx Specimen SSN: Ethnicity: 1 • Caucasian Mother's PID: Image: Conter ID: SJMC No of Pregnancies: Birth Date: 01/01/1990 Gender: F • Female Center ID: SJMC No of Pregnancies: Current Visit Information Admission Date: 0.0100308/2017 Visit Type: 0 • Outpatient visit Discharge Date: Service Provider: SJMC St. Joseph Medical Center MR No: 1001505367 Admit. Physician: Patient Location: SJMC - SJMCLAB Account No: 200100336254	Patient ID: 1554555 Status: A 🔽 Active Merged to ID:
Last: SAFETRACE First: IPFEMALE Middle: Prefix: ▼ Suffix: HC#: Enterprise ID: Converted: N s c X a d aby A Pos r h 1 His General Comments Extended Typings Special Needs TxRx Specimen SSN: - Ethnicity: 1 Caucasian Mother's PID: Image: Conter ID: SJMC No of Pregnancies: Birth Date: 01/01/1990 Gender: F Female Center ID: SJMC No of Pregnancies: Current Visit Information Admission Date: 03/08/2017 Yisit Type: 0 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 N: 200100336254	_Name
HC#: Enterprise ID: Converted: N s c X a d aby A Pos r h H His General Comments Extended Typings Special Needs TxRx Specimen Tests SSN: Ethnicity: 1 Caucasian Mother's PID:	Last: SAFETRACE First: IPFEMALE Middle: Prefix: Suffix:
s c X a d aby APos r h I His General Comments Extended Typings Special Needs TxRx Specimen Tests SSN: Ethnicity: 1 Caucasian Mother's PID: Birth Date: 01/01/1990 Gender: F F Female Center ID: SJMC No of Pregnancies: Current Visit Information Admission Date: 03/08/2017 Visit Type: 0 O 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	HC≇: Enterpr <u>i</u> se ID: Converted: N
General Comments Extended Typings Special Needs TxRx Specimen Tests SSN: - Ethnicity: 1 Caucasian Mother's PID: Birth Date: 01/01/1990 Gender: F Female Center ID: SJMC No of Pregnancies: Current Visit Information	s c X a d aby APos r h I His
SSN: Ethnicity: 1 < Caucasian	General Comments Extended Typings Special Needs TxRx Specimen Tests
Birth Date: 01/01/1990 Gender: F • Female Center ID: SJMC No of Pregnancies: Current Visit Information Admission Date: 03/08/2017 Yisit Type: 0 • Outpatient visit Discharge Date:	SSN: Ethnicity: 1 💌 Caucasian Mother's PID:
Current Visit Information Admission Date: 03/08/2017 ⊻isit Type: O ▼ Outpatient visit Discharge Date: Service Provider: SJMC St. Joseph Medical Center MR No: 1001505367 Admit. Physician: Patient Location: SJMC - SJMCLAB Payer Provider: SIMC St. Joseph Medical Center Account No: 200100336254	Birth Date: 01/01/1990 Gender: F ▼ Female Center ID: SJMC No of Pregnancies:
Admission Date: 03/08/2017 Yisit Type: O Volpatient visit Discharge Date:	Current Visit Information
Service Provider: SJMC St. Joseph Medical Center MR No: 1001505367 Admit. Physician: Patient Location: SJMC - SJMCLAB Payer Provider: SJMC St. Joseph Medical Center Account N: 200100336254	Admission Date: 03/08/2017 Visit Type: 0 - Outpatient visit Discharge Date:
Admit. Physician: Patient Location: SJMC - SJMCLAB Payer Provider: SJMC St. Joseph Medical Center Account No. 200100336254	Service Provider: SJMC St. Joseph Medical Center MR No: 1001505367
Payer Provider: SJMC St. Joseph Medical Center Account N: 200100336254	Admit. Physician: SJMC - SJMCLAB
	Payer Provider: SJMC St. Joseph Medical Center Account N: 200100336254
Patient Visit Diagnosis	Patient Visit Diagnosis
ID Start Date End Date Comment	ID Start Date End Date Comment
× 03/08/2017	* 03/08/2017 E

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

P:\Transfusion Service History-Archived\Electronic Orders - SafeTrace Tx-00.docx	Effective Date: 7/21/17	Page 4 of 6			
Unauthorized use or copying of this document is prohibited by FHS.					

These steps are <u>only necessary</u> when Epic orders placed by hospital staff <u>are visible in the little "e"</u> but <u>cannot</u> **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.

Convico Provi	idor SIMC	St. Jocoph Modical	Contor		
MR	No: 1001505367	ac aasepii meuicai	Restrict by Ext. V	ʻisit No.	Cancel
	Pend	ing Electronic Orders			duciy
Order Seq	Order Received I	Date/Time External \	visit No Account	N	<u>R</u> eject
4063	11/07/2016 17:57	20010033	6254 20010033	36	
					Notes
					Associate
				-	
(111)			,		
		Orc	der Items		
	Provider Service		ltem Tyne	ltem ID	Quantit Befe
Order Seq	I TOVIDEL DELAICE		nom rypo		

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

elect Pendir	ng Electronic Order						2
Patie	ent ID: 1554555	SAFETRACE, IPFE	MALE			0	к
Service Pro	vider: SJMC	St. Joseph Medica	Center			Car	cel
м	R No: 1001505367	<	∏ R <u>e</u> strie	ct by Ext. Visit	No.	 	erv
	Pend	ling Electronic Orders					.,
Order Se	q Order Received	Date/Time External '	Visit No	Account N 4		<u>R</u> eje	ect
▶ 4063	11/07/2016 17:57	20010033	86254	200100336			
						Note	es
						Assor	iate
						<u>N</u> 0000	-1 64.6 6.7
A [11]							
				P			
		Or	der Items				
Order Se	qr Provider Service		Item Type	lte	m ID	Quantit	Refe
▶ 4063	893	TRANSFUSION REA	Test batte	ry TF	XN RXN INITIAL	1	

- 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**

P:\Transfusion Service History-Archived\Electronic Orders - SafeTrace Tx-00.docx	Effective Date: 7/21/17	Page 5 of 6	
Unauthorized use or copying of this document is prohibited by FHS.			

AABB Standards for Blood Banks and Transfusion Services, current edition AABB Technical Manual, current edition

P:\Transfusion Service History-Archived\Electronic Orders - SafeTrace Tx-00.docx	Effective Date: 7/21/17	Page 6 of 6	
Unauthorized use or copying of this document is prohibited by FHS.			