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ORDER MANAGEMENT – 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 process and options for order management in SafeTrace Tx

BACKGROUND

Orders originate by provider entry in Epic and are brought in through the Epic/SafeTrace interface. Additional orders can be manually added on to a patient's order.

Steps A and C of this document applies to SAH, SCH, SEH, SFH.

RELATED DOCUMENTS

M-W-TS-0333   Electronic Orders – SafeTrace Tx

STEPS

A. Opening an <u>Existing</u> Order from the Patient Order Module

1. Determine the correct order number. This can be done by:
   - Looking up results in the Test Tab – from the Patient Profile
   - It can be done by finding the test on the pending worklog. Both will provide the order number if you highlight the row and scroll right.
2. From the Patient/Order Module select: **File > Open > Order**. The Open Order window opens
3. Type in the **Order #** of interest and click **Query** or press Enter to see the tests displayed in the order grid.

B. Adding Items to an Order

1. Open the profile for the desired order. Select the **File** menu > select **Open >** select **Order.** Enter the order number or other search criteria and click **Query**.
2. If the status of the order is complete, select **Orders**> select **Change Status to Ordered**. The order status updates to 'Ordered'.
3. Enter "T" in the time box. Tab.
4. On the Order Profile window, add a row to the Items grid for each item to add on to the order, and complete all required fields
5. When finished, click the **Save** icon in the upper left hand corner of the window.

6. Close the Order Profile window, by clicking the **X** button on the top right corner of the window.

C. Cancelling an Entire Order (SAH, SCH, SEH, SFH, SJMC – for product orders)

1. Open the profile for the desired order. See 'Opening an Existing Order' for detailed steps.

2. Select **Orders** > select **Cancel Order**. A warning window opens asking 'Do you want to commit changes?'

3. Click **OK** to cancel the entire order. The status of all items and the order update to 'Cancelled.'

4. Click the save icon in the upper left corner to save the changes to the order.

5. Close the Order Profile window, by clicking the **X** button on the top right corner of the window.

6. Double-check in Epic to be sure the order was cancelled there as well.

D. Cancelling an Item on an Order

1. Open the profile for the desired order by selecting: **File > Open > Order**.

2. In the Items Grid, **click the row of the item to cancel**

3. Select **Orders > Item > Cancel**.   A warning window opens asking, "Do you want to commit changes?"

4. Click **OK** to cancel the item. The status of the item **updates to Cancelled**.

5. Close the Order Profile window by **clicking the X** button on the top right corner of the window.

E. Removing a Blood Component from an Order

Do NOT release the unit to available first. Use this function only when you want to release one unit and replace it with a different unit.   Remember that if a crossmatch was performed on the unit being removed from the order, you must credit the patient for the testing done.

1. Open the profile for the desired order.   **File > Open > Orders**

2. With the Order Profile open for the patient select **Orders > Order Detail**. The order Item detail window opens.

3. On the Products tab, select the row that contains the component to remove from the patient order.

4. Click the **Deselect** button to remove the component from the patient order, **update the status to 'Not Used'** and put the unit back to available inventory.

5. Click **OK** to close the Order Item Detail window.

6. Close the **SAVE** icon on the tool bar to save the information.

7. Close the Order Profile window, by clicking the **X** button on the top right corner of the window.

8. The order will go back to the original tester's MW. From there it can be reassigned to another tech.

9. Another unit may be product selected to the order from the pending worklog when ready.

REFERENCES

AABB Standards for Blood Banks and Transfusion Services, current edition

AABB Technical Manual, current edition