Chapter VII: View Orders

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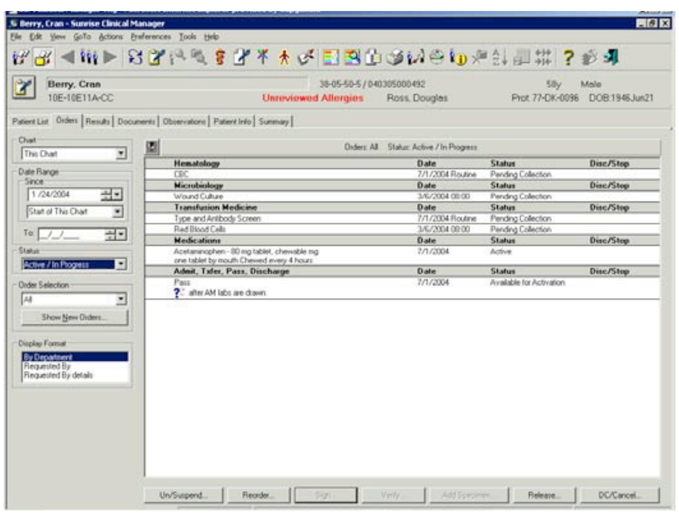
Orders Tab Overview

The **Orders** chart section allows you to review information about orders (including any available results) for a selected patient, to perform order maintenance functions. You can view order information in different formats—according to the department responsible for completing the order, or according to the date and time the order was requested. Using the options in the **View Control Panel**, you can specify which orders you want to view. The buttons at the bottom of the chart section allow you to perform order maintenance functions.

To display the Orders chart section:

1. Click the **Orders** tab, or, from the **GoTo** menu, choose **Chart Section**, then **Orders**. The **Orders** chart section is comprised of the following:
    a. The **Display** window, in the rightmost section of the screen, is where the orders appear, in the display format criteria you select in the **View Control Panel**. If more dates or orders are available than can be displayed at one time, scroll bars allow you to scroll the dates or orders into view.
    b. The **View Control Panel**, to the left of the **Display** window, is where you select your criteria for displaying orders.



Screen 1: Orders Tab

The **Function** buttons, along the bottom of the chart section, allow you to access order entry and maintenance functions for multiple orders.

- **Un/Suspend -** Opens the **(Un)Suspend Orders** dialog box, allowing you to suspend or unsuspend multiple orders for the selected patient.

- **Reorder -** Opens the **Copy/Reorder** dialog box, allowing you to reorder multiple orders. You can also copy the orders from another chart into the current chart for reordering.
- **Sign -** Opens the **To Sign** dialog box, where you can sign any orders that need your electronic signature. This button is disabled if no orders require signing, or if you do not have the security rights to sign orders.
- **Verify -** Opens the **Orders to be Verified** dialog box. This button is disabled if no orders require verification, or if you do not have the security rights to verify orders.
- **Release -** Opens the **Release Orders** dialog box, where you can release hold orders. You can release a single order or a batch of orders at one time.
- **DC/Cancel -** Opens the **Discontinue/Cancel Orders** dialog box, where you can discontinue or cancel one or more orders. You can also access the **Discontinue/Reorder Orders** dialog box from this dialog box.

Filters

You can specify which orders you want to see by screening or *filtering* which orders are to be displayed. A *filter* is a collection of one or more result categories or items; for an order to be displayed, it must fall into the specified category or match the specified order item. A filter enables you to focus on selected orders by "filtering out" orders that don't meet the filter criteria. For example, you can create a filter to display only active or completed orders.

The **Filter** icon displays at the top left corner of the **Display** window to indicate that the orders are filtered.

Orders Tab View Control Panel (Filters) Definitions

- **Chart**: **All Available** refers to all information for all visits. **This Chart** is limited to this visit.
- **Since**: Used to specify a date range for viewing. When you know exact dates, enter the start date in the **Since** field. If there is an end date, enter the date in the **To** field. You can also use pre-defined timeframes from the drop-down list such as one week ago or one month ago. You should not use both options at the same time. Note: If a time frame is used it will change the Since date.
- **Order Selection**: This option lets you view **ALL** information by department or category. Other categories are also available:
  - Imaging
  - Laboratory

- Transfusion Medicine
- Chemistry
- Hematology
- Microbiology

- **Display Format:** This option gives you multiple ways to view information which may appear as orders by department, requested by, and requested by details.

Apply filters

To view orders for:

- The current chart only
  1. In the **Chart** drop-down list on the View Control Panel, select **This Chart**.
- All available charts
  1. In the **Chart** drop-down list on the View Control Panel, select **All Available**.

To select the date range for viewing orders:

1. In **Date Range** group box in the **View Control Panel**, do one of the following to provide a **Since** date:
   a. In the **Since** field, enter a specific date.
   b. Use the increase/decrease arrows to change the date one day, month, or year at a time.
   c. Click the calendar arrow and select a date. Select the day after you have selected the month and year.
   d. Select a pre-defined option from the drop-down list, such as Start of This Chart.
2. Do one of the following to provide a **To** date:
   a. In the **To** field, enter a specific date.
   b. Click the increase/decrease arrows to change the date one day, month, or year at a time.
   c. Click the calendar arrow and select a date.

To view orders of a particular status:

- In the Status drop-down list on the View Control Panel, select the desired filter. For example, Active/In progress, All, or Discontinued orders.

To view particular types of orders:

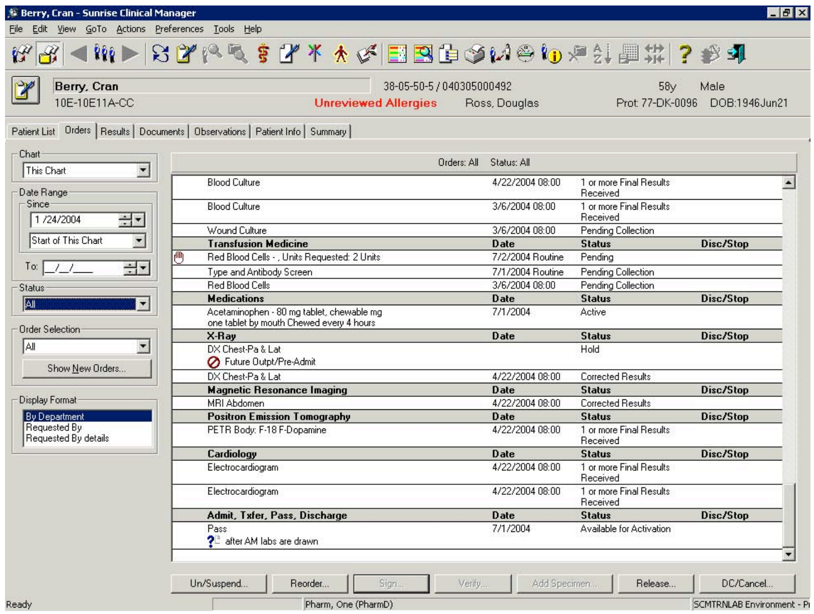
- In the **Order Selection** drop-down list on the **View Control Panel**, select the desired filter. For example All, Nursing, or Pharmacy.

Selecting the Display Format for Viewing Orders

You can view a patient's orders according to the department that performs the order, further organized by scheduled date and time within the department (**By**

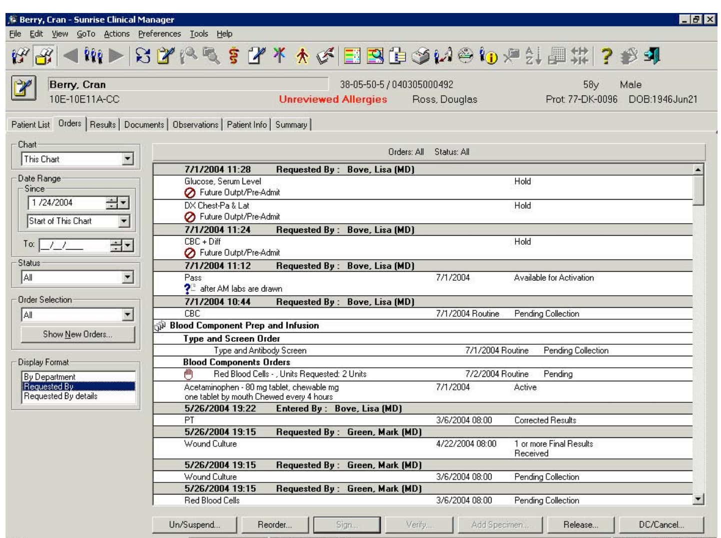
Department view), or according to the entered date and time (**Requested By** and **Request By Details** views).
In all views, you can double-click on an order to display its associated order form.

- **By Department** Format - The By Department view displays all orders according to the department that receives the order, and reports any results. For example, orders for medications are listed under Pharmacy.



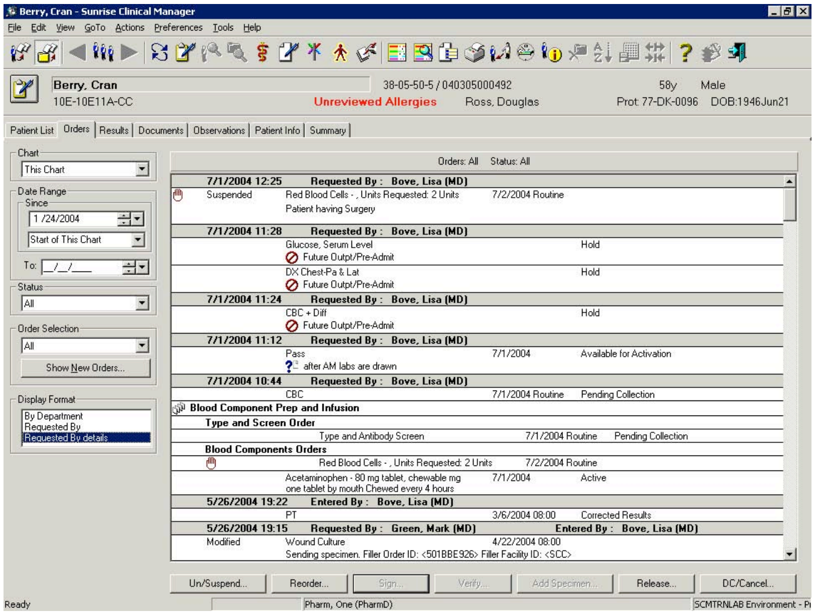
Screen 2: By Department Filter

- **Requested By Format -** The **Requested By** view displays all orders in the **Display** window of the **Orders** chart section grouped according to the date and time they were submitted to CRIS.



Screen 3: Requested by Filter

- **Requested By Details Format -** In addition to the details displayed in the **Requested By** view, the **Requested By Details** view displays orders grouped by the date and time that order maintenance functions were performed in CRIS. This includes Discontinue/Cancel, Modify, Suspend, and Unsuspend. This means that, orders may be displayed many times in the **Requested By Details** view.



Screen 4: Requested By Details Filter

Remove Filter

Once a filter is applied, you can remove it or change to another filter. To remove a filter, change the selection back to **All**.

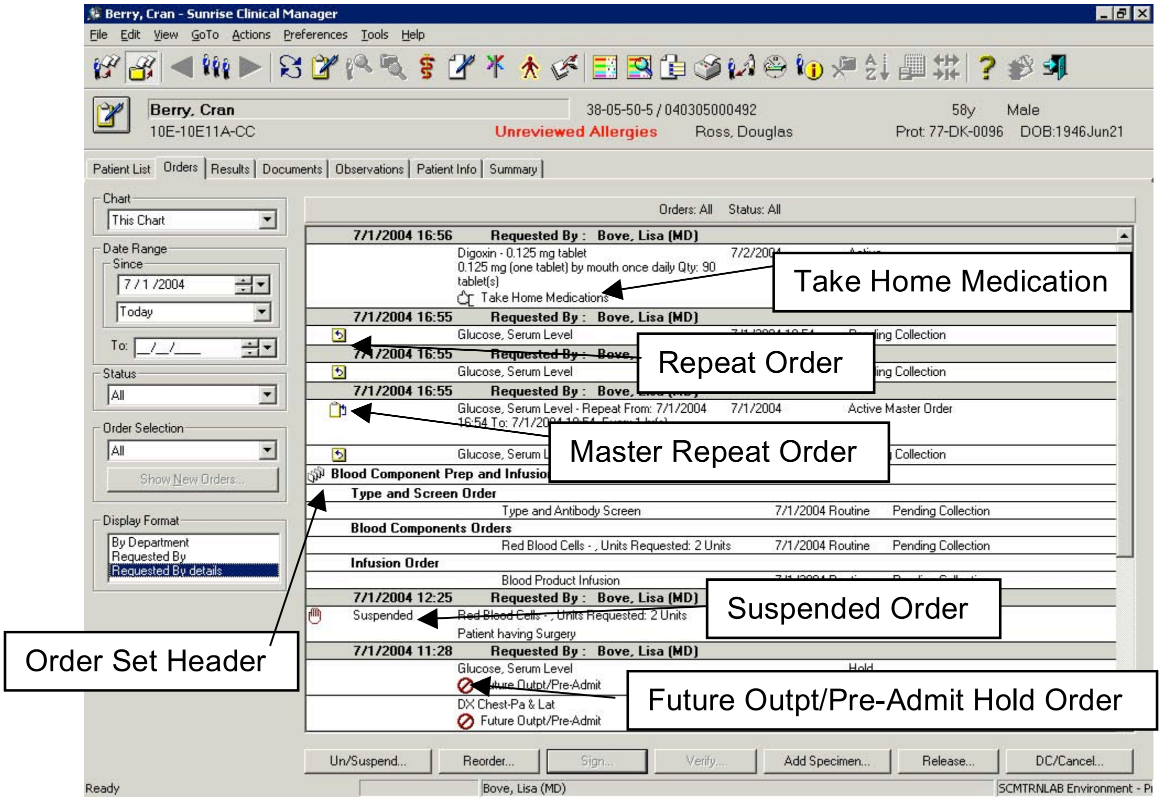
New Orders

To view new results from the Orders tab:

1. Click the **Show New Orders** button in the order selection box. The **New Orders** dialog box will display.
2. To clear the flag, click **Clear Flag** on the **New Orders** dialog box. Otherwise, click **Don't Clear Flag**.

Symbols

Various symbols display on the Orders tab.



Screen 5: Orders Tab Symbols

View Order Details

To display details of an order do one of the following in the **Orders** chart section:

- Select the order you want to view details for and from the shortcut menu, select **View Details.**
- From the **View** menu, select **Order Details**.
- Double-click on the order's header line.

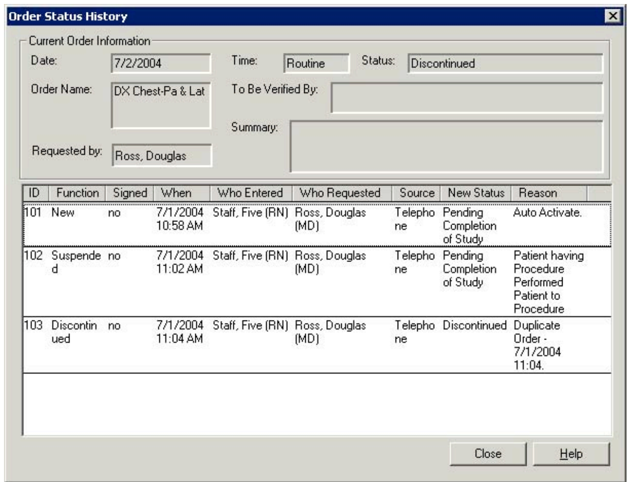
The order form opens in view mode, where you can see all the information associated with the order.

Reviewing Order Sets

You can view order sets in the **Orders** chart section in either the **Requested by** or **Requested by Details** view. An order set is listed in the **Display** window by its name, followed by the orders included in the set. You view details for an order set order the same way you view them for an individual order that is not part of an order set.

Reviewing the Status History of Orders

The **Order History Status** from the shortcut menu displays a dialog box which shows a history of all status changes for an order in chronological order.



Screen 6: Order Status History Dialog Box

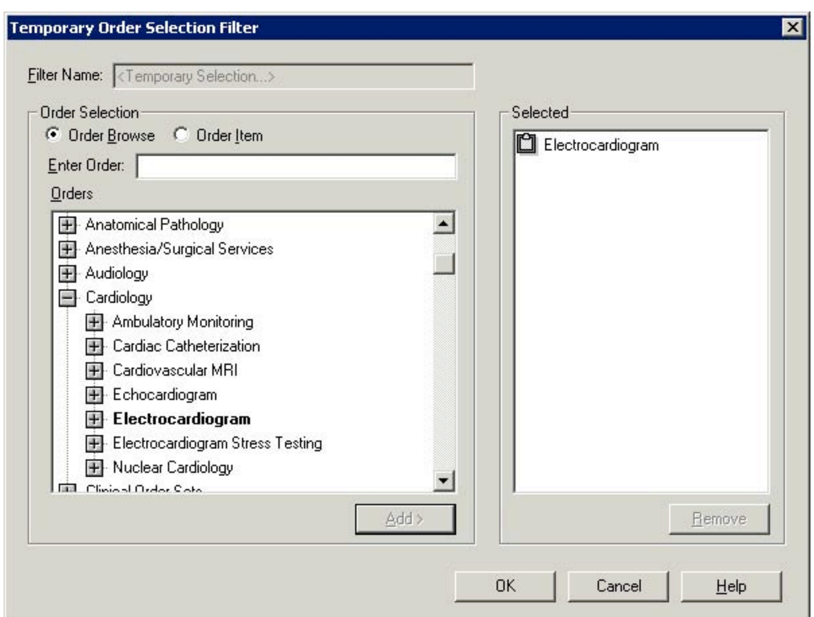
Personalizing Your Orders View

Creating a temporary Orders selection filter

The **Temporary Orders Selection** dialog box allows you to select Orders to be displayed in the view on a one-time or temporary basis. This filter is cleared and not saved after you log off or select another filter.

To create a temporary selection filter:

1. From the **Orders Section** filter, select **<Temporary Selection…>.** The **Temporary Orders Selection** window displays.



Screen 7: Temporary Results Selection Window

Setting your preferences for viewing results

The **Personal Orders View Options** dialog box allows you to set up customized, personal preferences for the **Orders** chart section. By setting your preferences, you can see the information important to you in the **Orders** chart section. The three tabs in this dialog box allow you to:

- Create and maintain filters for the status of the orders you want to view (**Status** tab).
- Create and maintain filters for the types of orders you want to view (**Order Selection** tab).
- Specify the default order selection filter and display format for the chart section (**Display Format** tab).

Status tab

The **Status** tab of the **Personal Order View Options** dialog box allows you to select which orders to display in the **Orders** chart section based upon status. It also allows you to set the default status filter to be used when you first open the **Orders** chart section.

To add a new order status filter to the Orders chart section:

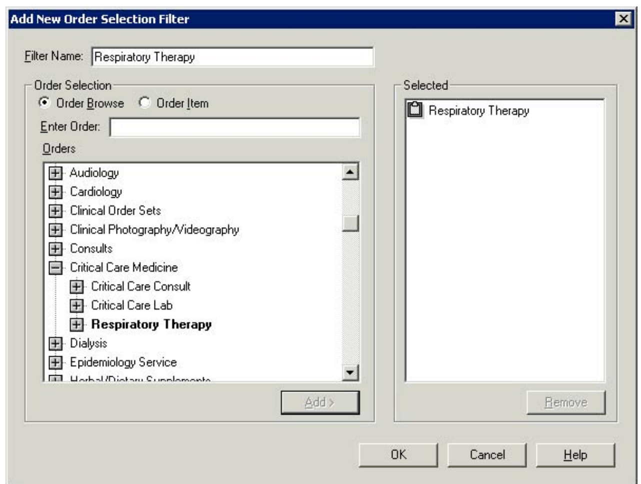
1. With the **Orders** chart section displayed, from the **Preferences** menu, select **Order Review**. The **Personal Order View Options** dialog box opens.
2. Click the **Status** tab.
3. Click **Add New**. The **Add New Status Filter** dialog box opens.
4. Enter a name for your new status filter. You can enter a name of up to 25 characters.
5. Do one of the following:
    a. Click **Any** to view orders of any status.
    b. Click **Orders Due to Expire** to view orders that are due to expire in x days. (The order must have a stop date for this option to work.)
    c. Click **Selected** and select the desired statuses from the list. To select consecutive statuses, select the first status, hold down Shift, and select the last status.
6. If desired, click the options on the right side of the dialog box to specify how you want to view suspended, PRN, discharge, and conditional orders.
7. Click **OK**. If you have entered a duplicate filter name, an error message displays. The new status filter name displays in the Status tab.

Orders Selection Tab

The **Orders Selection** tab of the **Personal Orders View Options** dialog box displays the current Orders selection filters. In this dialog box, you can add, change, or delete filters, and choose a default filter for when you display the **Orders** chart section. If you do not choose a default filter, the filter **All** (which cannot be deleted or modified) is the default. You can create a new filter and make it the default, or you can make an existing filter the default.

To add an Orders selection filter:

1. From the **Preferences** menu, select **Order Review**. The **Personal Orders View Options** dialog box opens.
2. Click the **Orders Selection** tab.
3. To create a new filter, click **Add New**. The **Add New Orders Selection Filter** dialog box opens.



Screen 8: Add New Orders Selection Filter Window

4. Type a name for your new Orders filter in the **Filter Name** field.
5. In the **Orders Selection** group box, do one of the following:
    a. Click **Orders Browse**. The **Browse** shows a tree structure of Orders groups and items. Select the group or item you want included in the filter. To select sequential groups or items, hold down Shift and click on each choice. To select non-sequential groups or items, hold down Ctrl and click on each choice.
    b. Click **Orders Item**. Enter part or the entire name of the item you want to include in the filter. When you enter part of the name and pause, an alphabetical list of items that begin with the characters you entered displays in the browse window.
6. Select a category or item and click **Add** to place the selected item(s) in the **Selected** list. To delete any groups or items from the **Selected** list, select the category or item and click **Remove**.
7. Click **OK** to return to the **Orders Selection** tab.
8. If you want to make the new filter the default, click **Set as Default**.
9. Click **Close** to save the filter and return to the **Orders** chart section. The new filter appears in the **Orders Selection** drop-down list in the **View Control Panel**. If you selected the filter as the default, it will be used the next time you log on and display the **Orders** chart section.