

Protocol Order Sets

The person requesting the protocol order set may request a consultation prior to designing or submitting the request. This allows clarification of design questions and identification of potential problems or technical limitations imposed by the system. For assistance from a Triage Analyst send an email to the CRIS Protocol Order Set team at **CC-DCRI Protocol Order Set Team**.

Instructions for Requesting Changes to Existing Protocol Order Sets:

1. Provide existing protocol order set name(s) and protocol study number.
2. Use the [DCRI Request Form](#)  (238 KB) to list your modifications. Screen captures with revisions on them are also acceptable.
3. Complete form and obtain signature of authorized official (PI, AI) for this protocol.
4. Scan a copy of your request, and email to CC-DCRI Protocol Order Set Team.
5. Alternately, you may submit your request to the DCRI office, located in Building 10, Room 1C290. If you have worked with a particular DCRI analyst, please put the name of this person on the envelope.

Instructions for Submitting New Protocol Order Set Requests:

1. For protocol order sets, obtain approval and a protocol number through the IRB. A protocol number will be needed before the protocol order set can be finalized and deployed to Production CRIS.
2. For all protocol order sets, use the DCRI Request Form (238 KB) to organize your orders chronologically and/or by category.
3. If the proposed order set contains orderable items from the following departments, the relevant content will need to be reviewed and approved by the following department contacts prior to submission to DCRI:
 - a. **Department of Laboratory Medicine (DLM)** in-house labs
[Contact: Joshua Cohen 301-402-0584.](#)
 - b. **Department of Transfusion Medicine (DTM)** certain tests or studies
[Contact: Boyd Conley 301-496-4506 or Sherry Sheldon 301-451-8654.](#)
 - c. **Nutrition** (only if a new unique diet is needed)
[Contact: Lee Unangst 301-451-7188.](#)
 - d. **Pharmacy** for all formulary medications and IVs (must have dosages & schedules approved)
[Contact: Mike Brown 301-402-8887.](#)
 - e. **Investigational medications** custom-built in unique order sets and managed by Pharmacy Developmental Services (PDS)
[Contact: Judy Starling 301-496-1031.](#)
 - f. **MRI** if you are not requesting a routine MRI clinical exam
[Contact: John Butman 301-402-5827.](#)

Obtaining these approvals prior to request submission will help expedite the development process once the order set request has been submitted. Once obtained, include a written copy of the approval with your content submission.

4. Use the CRIS application to assist in identifying the names of order(s) you need in the protocol order set.
 - a. Locate the order's name.
 - b. Open the order(s) and review the order form(s).
 - c. Provide information to be pre-filled in the required fields (i.e. indicate the field name and information to go into the fields). When you can, provide information which can be included in Special Instructions or Reason fields.
 - d. Order sets can default an orderable item as selected or unselected (via a checkbox on the left-hand side). Specify which of your orders in the order set should be selected.
 - e. We can help organize your content utilizing headers above the different sections of your order set. If those groupings come to mind, you can provide information on logical headers to include in your order set and the correct positioning.

Providing accurate CRIS order names and content for mandatory fields will help expedite the development process once the order set request has been submitted, as well as assist in the vetting of the request by the impacted departments.

5. If an existing protocol order set in CRIS is very similar to the design you desire we might be able to copy and modify to meet your needs. Please mention this on the request.
6. Attachments or screen images that clarify the design requirements are encouraged due to space constraints on the request form. Please exercise caution to protect all Personally Identifiable Information (PII).
7. Once all information is collected the [DCRI Request Form](#)  (238 KB) should be completed and signed by an authorized official (PI, AI) for this protocol. Scan a copy of your request, and email to **CC-DCRI Protocol Order Set Team**.
8. Alternately, you may submit your request to the DCRI office, located in Building 10, Room 1C290. If you have worked with a particular DCRI analyst, please put the name of this person on the envelope.
9. Generally a protocol order set takes 4-6 weeks for development. More complex order sets may take longer. Delivery time may change due to circumstances beyond our control.
10. If you have any questions contact the **CC-DCRI Protocol Order Set Team**.