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Performing Order Maintenance

There are multiple ways to perform order management functions from the Orders tab.

Note: For training purposes, we will cover each method, and then only use one for the remainder of the training.

- Right-click on the order and select the management option from the shortcut menu
- Select the check box next to the order(s) and select the appropriate Orders tab toolbar button.
- Click the Orders tab toolbar button for the appropriate order management function to access a window for selecting multiple orders to perform the same action at once.

Discontinuing/Canceling an Order

The Discontinue/Cancel feature allows you to stop (discontinue) an order for a patient.

Note: The action of discontinuing or canceling of an order is based on the status of the order. For example, lab and radiology orders can only be ‘canceled’ once resulting of the order has begun.

To Discontinue/Cancel an Order

1. From the Orders tab, right-click on the Chest 1 View order.
2. From the shortcut menu, select Discontinue/Cancel.
   - The DC/Cancel window appears.
3. Leave the Requested By default of Me.
4. From the Reason field, select Order Cancelled per Physician Order.
5. Leave the **Now** option button default.  
   **Note:** Optionally, select the Date option button to specify a specific (future) 
   date and time for the order to discontinue in the future.
6. Click **OK**.
7. Enter your **password authentication**.
   *The order appears in italic text and the status changes to **Discontinued**.*

### Discontinuing/Reordering an Order

The Discontinue/Reorder feature may be used if the physician determines that 
the route or dose needs to be changed for an existing medication. This feature 
allows you to discontinue the existing order and reorder a new medication of the 
same orderable with the adjusted dose or route.

### To Discontinue/Reorder an Order

8. Select the **acetaminophen 650 mg tablet** order check box.
9. On the **Orders** tab toolbar, click the **Discontinue/Reorder** button.  
   *Notice you have the option to retain the current dose or select from 
   alternate orderable doses.*
10. From the options, select **acetaminophen tablet**. 
   *The DC/Reorder window appears. Since this item was ordered from an 
   order set, the other linked items also display.*
11. Leave the **acetaminophen tablet** selected as defaulted.
12. From the **Reason** field, select **Order Cancelled per Physician Order**.
13. Click **OK**.
   *The Password Authentication window appears. 
   This is for discontinue of the original order.*
14. Enter your password authentication.
   *The Order Entry Worksheet appears with the new version of the order 
   added to the ‘Shopping Cart’.*
15. Double-click on the order in the ‘Shopping Cart’ to open the form.
16. Change the **Dose** to **500**.
17. Complete the required **Frequency** and **PRN Reason** fields.
18. Click **OK**.
19. **Submit** the order and enter your password authentication.  
   *The original order status is Discontinued and the new order is **Active**.*

### Modifying an Order

The Modify order feature lets you ‘change’ one or more of the fields on the 
originally submitted order form.

Determine your facility’s workflow for modifying an order.
To Modify an Order

20. Right-click on the Dextrose 5% in Water Infusion order.
21. From the shortcut menu, select Modify Order > Requested by Me.
   - The Requested By window appears.
22. On the order form, change the Rate to 100.
23. Click OK and enter your password authentication.
   - The order appears on the Orders tab with the Order Modification History icon.

Releasing Orders on Hold

Orders placed on ‘Hold’ status may be released to ‘Active’ status once the patient event occurs. Once the hold orders are released, they are communicated to the performing department.

Because orders can be released hours or even the day after it is submitted, the Requested Date field will be populated with the date the order is released, rather than the date it was ordered.

To Release Orders on Hold

24. Click the Release/Manage Hold Orders button on the Orders tab toolbar.
   - The Hold Orders Manager window appears.
25. Click the **Select All** button.  
   *All hold orders are selected.*

26. Select the **Release Selected Orders** check box.
27. Click **OK**.  
   *The Hold icons are removed.*

### Suspending/Unsuspending an Order

An active order that should be stopped temporarily may be suspended. For example, all orders for a patient may be ‘suspended’ while the patient is in the OR, and later ‘unsuspended’ when the patient returns to the unit.

### To Suspend an Order

28. On the **Orders** tab toolbar, click the **Suspend** button.

   *The (Un)Suspend window appears.*
Note: This function is used to suspend multiple orders at once. To suspend a single order, right click on the order and select Suspend > Suspend Order.

29. Click the Select All button.
   Note: If you are a nurse, ensure to select Other and select the requesting provider name and Source = Verbal.

30. From the Reason drop-down list, select Patient Off Unit.
   Note: Optionally, in the Suspend starting when section, you can do one of the following to set a current or future date/time/event for the order to suspend:
   Now—to suspend the order immediately.
   Date—to select a date and time to suspend the order in the future.
   After next dose or occurrence — to be suspended after the next dose.

31. For this example, accept the default of Now.
   Note: Optionally, in the Suspend until when section, do one of the following to set a date/time for the order to unsuspend:
   User unsuspends—the user will manually unsuspend at the appropriate time.
   Date / Time—to select a date and time to suspend the order in the future.
   For—to set for certain number of days, hours, minutes, etc..

32. For this example, accept the default of User unsuspends.
33. Click OK.
    *The Urgency Status column appears with a 'hand symbol' next to the order indicating suspended.*

![Image of Order Summary with hand symbol]

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**To Unsuspend an Order**

34. On the **Orders** tab toolbar, click the **Unsuspend** button.

![Image of Unsuspend window]

35. Click the **Select All** button.
36. Click the **Reason** drop-down list and select **Patient Returned to Unit**.
37. Click **OK**.
    *The 'hand symbol' is removed from appearing next to the order.*

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**Activating Conditional Orders**

When the condition that was placed on a conditional order has been met, you can activate the order so that it may be processed.

**IMPORTANT**: If your facility has configured conditional orders to be activated from the Worklist this function cannot be performed from the Orders tab. Determine your hospital workflow decision for this process.

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**To Activate Conditional Orders From the Orders Tab**

38. From the **Orders** tab, right-click on the **Blood Culture** order.
39. Select **Activate**.
    *The Order Entry Worksheet window appears with the order in the 'Shopping Cart' ready to be submitted.*
40. Optionally, open the order form to Edit any fields, if needed.
41. Click **Submit** and enter your password authentication.
    *The order status is Completed Activation.*

**Note**: For this example, for the conditional order, the number of activations have been completed (Completed Activation) because the number of activations for the condition was originally ordered as Once. If multiple or unlimited number of activations were selected in the order, the status would indicate **Activations Available**.
Summary

Having completed this lesson, you should be able to:

- Maintain an order
- Release orders on hold
- Activate Conditional Orders

Signing and Verifying Orders

Objectives

This lesson introduces you to the Signature Manager. You use this tool to sign and verify orders for single or multiple patients.

Upon completion of this lesson, you should be able to:

- Sign orders
Introducing Signature Manager

Any orders that require signature by another are completed using the Signature Manager function. If a clinician enters an order requested by him or herself, then that order will not trigger the To Sign flag on the Patient List.

Both order signature and order verification are done using Signature Manager.

Note: Signature Manager is also used for any signature requirements for clinical notes and medication administration tasks that require a co-signature.

Understanding Alert Flags

You are notified of orders requiring your signature via Alert Flags on the Patient List.

<table>
<thead>
<tr>
<th>Name</th>
<th>To Sign</th>
<th>To Verify</th>
</tr>
</thead>
<tbody>
<tr>
<td>Red Flag</td>
<td>Alerts of orders that you must sign.</td>
<td>Alerts of orders that you must verify.</td>
</tr>
<tr>
<td>Green Flag</td>
<td>Alerts of orders that someone else must sign.</td>
<td>Alerts of orders that must be verified.</td>
</tr>
</tbody>
</table>

IMPORTANT: Determine if your facility has configured Signature Manager to auto trigger upon logon to Sunrise Acute when a user has pending signature requirements. If so, it is recommended that you train to this function/workflow.

Note: Follow the steps as outlined and partner participants to enter orders so that each participant will have order examples to sign for their training patient.
To Sign Orders

42. Access the Order Entry Worksheet.
43. On the Order Entry Worksheet, click the Other option button.
44. In the Requested By window, click the Other option button.
45. In the name search field, have each participant type the last name of their assigned partner student’s training ID.
46. In the search results window, select the correct <training name of the participant sitting next to you>.
47. From the Source drop-down list, select Verbal.
48. Click OK.
49. Enter the following orders:
   - Morphine Injectable 2 mg, ONCE
   - Furosemide 20 mg tablet, Daily
   Note: If the Alert Detail window displays for the Telephone Order Read-Back, acknowledge the alert and continue.
50. Submit the orders.
51. Enter your password authentication.
52. Click the Patient List tab.
53. Ensure your patient is in view.
   - Notice the Red flag in the To Sign column.
54. Double-click the flag in the To Sign column.
   Hint: To manage order signatures for multiple patients, click the Signature Manager button on the main toolbar.
The Signature Manager window appears.
Signature Manager Filters

- **Function**—select the appropriate option to Sign or Approve/Verify (the appropriate selection should default based on the signature rule of the document)
- **Patient Selection**—allows you to filter items to be signed by patient(s) (e.g., All Patients, This Patient – This Chart, This Patient – All Charts, etc.)
- **Date Range**—allows you to filter date range of items to be signed based on date created.
- **Facility Selection**—for multi-facility hospitals, allows you to filter items by facility.
- **Provider Selection**—allows you to filter items to be signed by provider or provider group.
- **Item Type Filter**—allows you to filter items by type (e.g., documents, orders, etc.)
- **Item Status Filter**—allows you to filter items by status.
- **Sort Sequence**—allows you to filter items by a specific sort sequence.
- **Item to Process**—select the appropriate option to Sign, Refuse or Reassign

(Nota: you must have appropriate rights to be able to Reassign an item for signature).

55. Clear (uncheck) the Furosemide order (leaving the Morphine selected).
56. Click the **Sign** button.
57. Enter your password authentication.
   - **A red checkmark appears next to the signed order.**

Refusing to Sign Orders

If an order has been misattributed to you for signing, you can refuse to sign the order.

Determine Hospital Workflow

Who will be responsible for managing the Refuse Signature Report for reassigning orders to the appropriate physician for signature as needed?

To Refuse to Sign Orders:

58. Ensure the appropriate items to refuse to sign are selected. Clear any items you do not want to include.
59. Click the **Refuse** button.
   - The Refuse Signature window appears.
60. From the **Refusal Reason** drop-down, select a reason for refusal or enter a free-text reason.

61. Click **OK**.
   
   You are returned to the **Signature Manager** window with a red checkmark next to the selected item(s).

62. Click **Close** to close the **Signature Manager** window.
   
The flag is removed from the To Sign column on the Patient List.
Summary

Having completed this lesson, you should be able to:

- Sign orders
Reconciling Orders

Introduction to Reconciling Orders

Objectives

In this module, we will cover the following lessons:

- Introducing Order Reconciliation
- Using Admission Reconciliation
- Using Transfer Reconciliation
- Using Discharge Reconciliation

Introducing Order Reconciliation

Objectives

This lesson introduces the use of the order reconciliation function.

Upon completion of this lesson, you should be able to:

- Describe what is Order Reconciliation
- Describe the three types of the Order Reconciliation event goals
Introducing Order Reconciliation

Order Reconciliation is a process that assists clinicians in comparing orders as a patient transition through different phases of care (admission, transfer, and discharge) and ensuring that medications are reviewed, adjusted, and/or continued at significant transition events in the patient’s stay.

There are three possible order reconciliation event types:

63. **Admission Reconciliation**—reconciliation event based on admit to hospital (direct admit or admit from ED).
64. **Transfer Reconciliation**—reconciliation event based on transfer from one level of care to another, or from one service to another.
65. **Discharge Reconciliation**—reconciliation event based on discharge from hospital.

Understanding the Order Reconciliation Event Goals

The goal of each order reconciliation event includes the following:

- **Admission Reconciliation**—Compare home medications with inpatient orders and decide which home meds should be continued as inpatient.
- **Transfer Reconciliation**—Compare pre and post transfer orders to ensure patient’s orders are correct and complete.
- **Discharge Reconciliation**—Determine home going medications by reviewing home medications documented on admission and current inpatient medications.