uC Health

Epic Job Aid

Research – Ordering Procedures

How to order a procedure and link it to a research diagnosis

This job aid provides step-by-step instruction on how to order a procedure and associate it with a research diagnosis using an Orders Only encounter; however, you are also able to complete this workflow during the visit encounter.
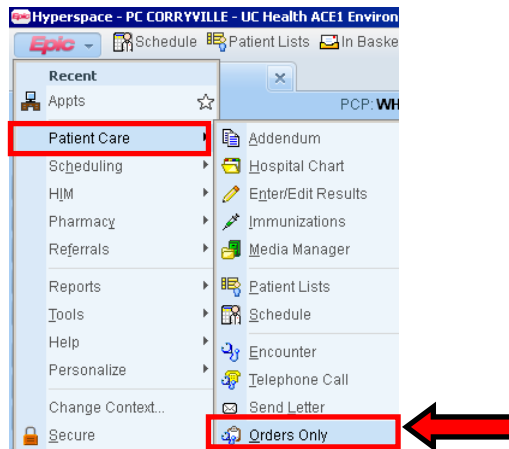
Audience

This job aid is designed for:
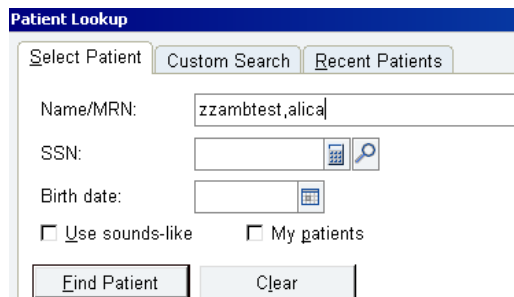
- Research Study Coordinators

Try It Out
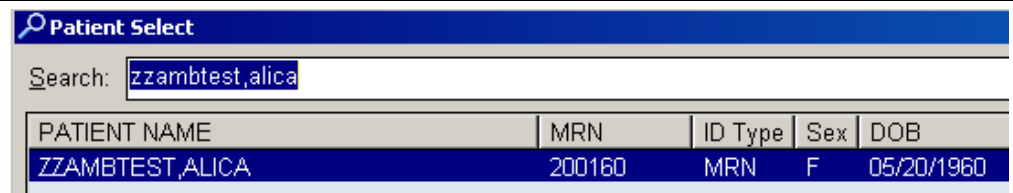
Create the Orders Only Encounter

1. Click on the **Epic button > Patient Care > Orders Only.**	
2. On the **Patient Lookup,** enter search criteria for patient. 3. Click **Find Patient.**	
4. On Patient Select, select click appropriate patient. 5. Click **Accept.**	
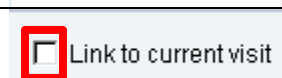
Link the Encounter to the Research Study

1. From within the encounter, click the **Research Studies** section in the Visit Navigator.	Research Research FYIs **Research Studies**
2. Click the box next to the Link to current visit to link the study enrollment to the current visit.	☐ Link to current visit

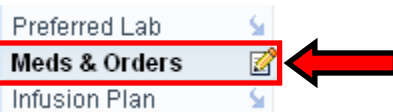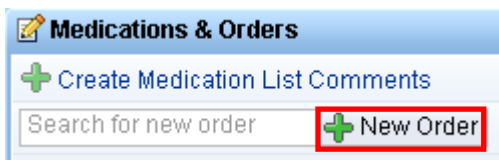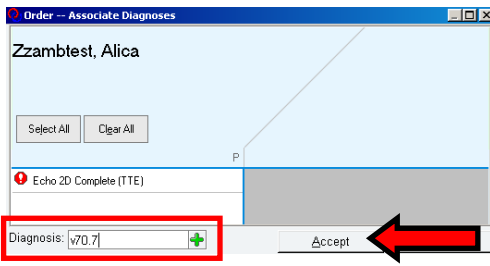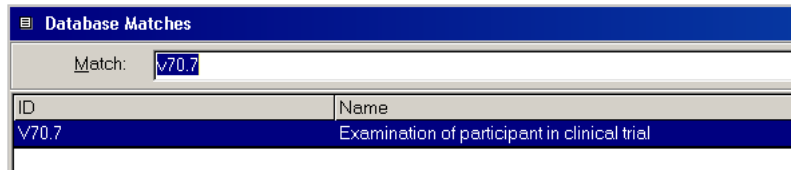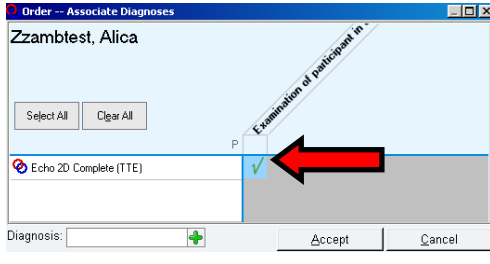| Create the Order	
1. On the navigator, click **Meds & Orders.**	Preferred Lab **Meds & Orders** Infusion Plan
2. Click **New Order.**	**Medications & Orders** Create Medication List Comments Search for new order New Order
3. On the Preference List Browser, use the **Imaging** or **Procedures** Preference Lists to find the desired order. Or, you may search for the order using the search field in the top left. 4. Select the order. 5. Click **Accept.**	Preference List Browser - Zzambtest,Alica Search During visit After visit Labs ▽ Imaging Ct Dxa Fluoro Mammo Mri Nm Us X-ray ▷ Immunizations ▽ Procedures Cv Cardiac Services Cv Echo Cv Vascular Neurology Ophthalmology Ser Pft Procedure/minor S Respiratory Care Mri (Imaging) ☐ MRI Abdomen W and WO contrast ☐ MRI Abdomen Without contrast ☐ MRI Angio Abdomen W and WO contrast ☐ MRI Angio Abdomen With contrast ☐ MRI Angio Head W and WO contrast ☐ MRI Angio Head With contrast ☐ MRI Angio Head Without contrast ☐ MRI Angio Lower Extrem Left W WO ☐ MRI Angio Lower Extrem Left With ☐ MRI Angio Lower Extrem Left WO ☐ MRI Angio Lower Extrem Right W WO ☐ MRI Angio Lower Extrem Right With ☐ MRI Angio Lower Extrem Right WO ☐ MRI Angio Neck W WO contrast ☐ MRI Angio Neck With contrast ☐ MRI Angio Neck WO contrast ☐ MRI Angio Upper Extrem Left W WO ☐ MRI Angio Upper Extrem Right W WO ☐ MRI Cardiac W WO contrast ☐ MRI Cardiac Without contrast ☐ MRI Cervical spine limited WO contrast
The order composer opens. 6. Depending on the order chosen, fill in the appropriate information in the order composer. • Status = Future • Priority = Routine • Class = Ancillary Performed • Questions • Scheduling Instructions • Comments • Additional Order Details 7. Click **Accept.**	Echo 2D Complete (TTE) Accept Cancel Remove Expires-4/18/2014, Routine, Ancillary Performed Status: Future Expected: ☐ Approx. Expires: 4/18/2014 Priority: Routine Routine STAT Class: Ancillary Perfo Clinic Performed Ancillary Performed Hospital Performed External Questions: Prompt	Answer	Comments 1. Reason for exam	Other: Must S	Research Study 2. Contact number for critical results	513-585-1234 | 3. Is it okay to add contrast as necessary for the exam?	Yes No | Single response | Sched Inst.: Click to add text Comments (F6): Click to add text ▷ Additional Order Details Accept Cancel Remove
8. Click **Associate.**	Echo 2D Complete (TTE) Remove Expires-4/18/2014, Routine, Ancillary Performed Mark All Taking Mark as Reviewed Never Reviewed R Click here to select a pharmacy Order Entry Associate viders Sign Pend Close F9 Previous F7 Next F8

9. In the Diagnosis field, type in **v70.7** and click the ![plus] to look up the research diagnosis.	
10. In the Database Matches screen, **Examination of participant in clinical trial** is selected. 11. Click **Accept.**	
12. Click in the box to associate the order with the diagnosis; green checkmark appears. 13. Click **Accept.**	
14. Proceed to: **Option A** if you are a provider and have Signing Authority **Option B** if you have the authority to sign with cosign required. **Option C** if you are a Nurse, MA or other office personnel.	

Option A: If You Have Signing Authority

15. Click **Sign.** 16. If you have signing authority, the order is signed and ready to process. 17. Assuming all other documentation has been completed, click **Close Encounter** and proceed to Step 32.	

Option B: If You Have the Authority to Sign with a Co-Sign Required **The Ordering Provider will receive an In Basket message in their Co-Sign Orders folder so that they can review and co-sign the order since they have full signing authority.**	

15. In the Order Mode, select **Telephone with readback**. 19. Verify or enter the Ordering Provider and Authorizing Provider as the Physician/ Principal Investigator. 20. In the Type of Supervision, choose **Nurse/MA** if this is your job role or **Supervision Required** if you are a non-Nurse/MA Researcher. 21. Verify or enter the Supervising Provider as the Physician/ Principal Investigator. 22. Click **Accept**.	

Option C: If You Have No Signing Authority and Must Pend (RN, MA and other Office Personnel)	

19. Click **Pend**.	
20. Click **Follow Up** section to route the encounter with pended orders to the Provider/PI.	
21. Enter the Provider/PI in the **Recipient** field (right side). 22. You may enter a routing comment in the **Comments** box.	
23. Close the patient workspace by clicking the "**X**" on the patient tab. *Please note that **no order** can be acted upon until **signed by the provider**.*	

Please Note

After the Order has been Signed or Pended:

- Call **5-TEST** to schedule the procedure – or you may follow the appropriate department process for scheduling.
- Send the Research Encounter form to the appropriate offices.