# Standard Request Process for Epic Orders

## How to request study orders and what to expect:

1. After protocol review, the study coordinator/team would have the orders written out, that they need built into Epic.

2. The study coordinator/team opens an ESC ticket.
    a. Attach protocol if study has full IRB approval.
    b. Include paper orders, if available.
    c. Include standard questions with answers, if available.

3. The ESC ticket is reviewed by HCIS Assistant Director.
    a. If non-oncology CRU-related orders, the ticket will be assigned to Research Epic Developer.

4. The questions below will be sent for the study coordinator/team to answer if they were not included in the ESC ticket.
    a. Send answers to RESEARCH EPIC DEVELOPER , who will add them to ESC ticket

5. RESEARCH EPIC DEVELOPER will begin building the Epic order set.
    a. If there are any questions regarding the orders, RESEARCH EPIC DEVELOPER will reach out to the study coordinator/team and a member of the CRU team for clarification.

6. Upon completion, RESEARCH EPIC DEVELOPER will schedule time with the study team and a member of the CRU team, to review the orders in Epic.
    a. If there are changes needed, these will be completed, and another meeting will be scheduled for review. This will continue until the build is fully approved.

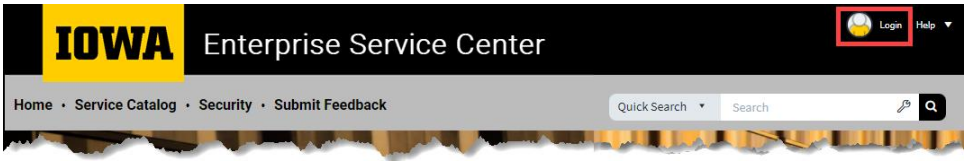
7. RESEARCH EPIC DEVELOPER will send an approval request to the appropriate informatics group(s).
    a. If there are changes needed, these will be completed and sent back for approval.
    b. Once final approval is received, any changes will be communicated to the study team.

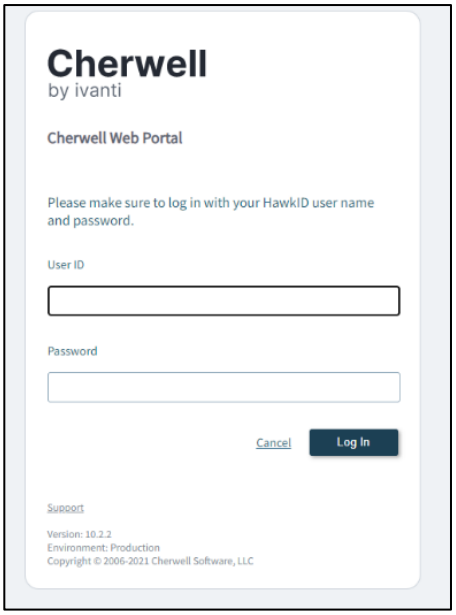
8. Once order set is approved, RESEARCH EPIC DEVELOPER will work with team to establish a go-live date.
    a. HCIS change management policy allows for new Epic content to be implemented on Tuesdays, barring no scheduled lock down on the production system (i.e. upgrade, etc.)
        i. Exceptions:
            1. Patient safety issue
            2. Timeline constraints

# Standard Request Process for Epic Orders

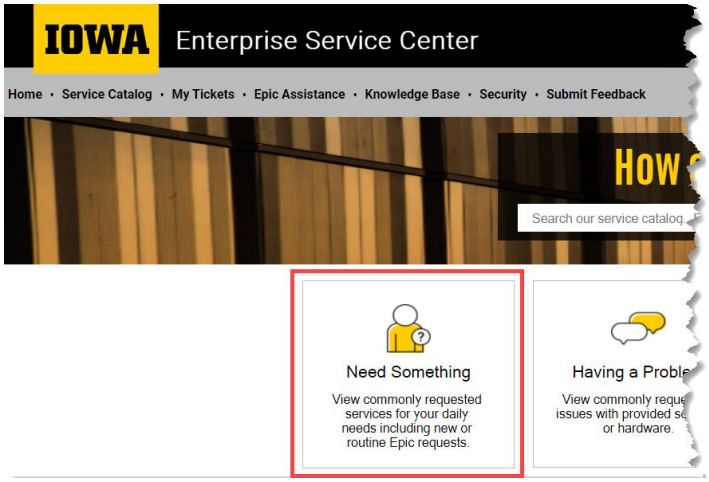
## How to open an ESC for orders:

1. Visit ESC - [Enterprise Service Center - ESC Portal (uiowa.edu)]
2. Login (hawk-id) and then click "Epic Assistance"



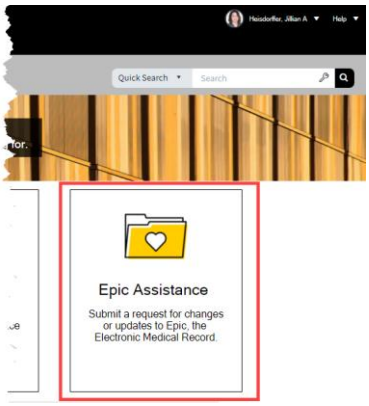




3. Click "Need Something"

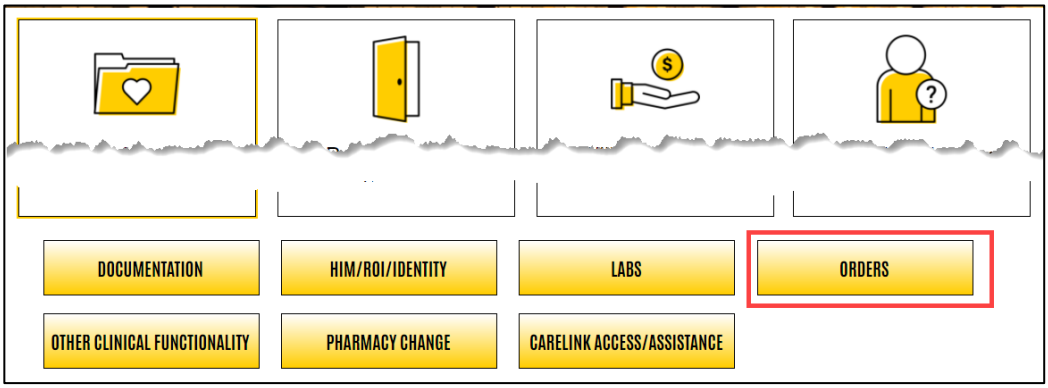


# Standard Request Process for Epic Orders

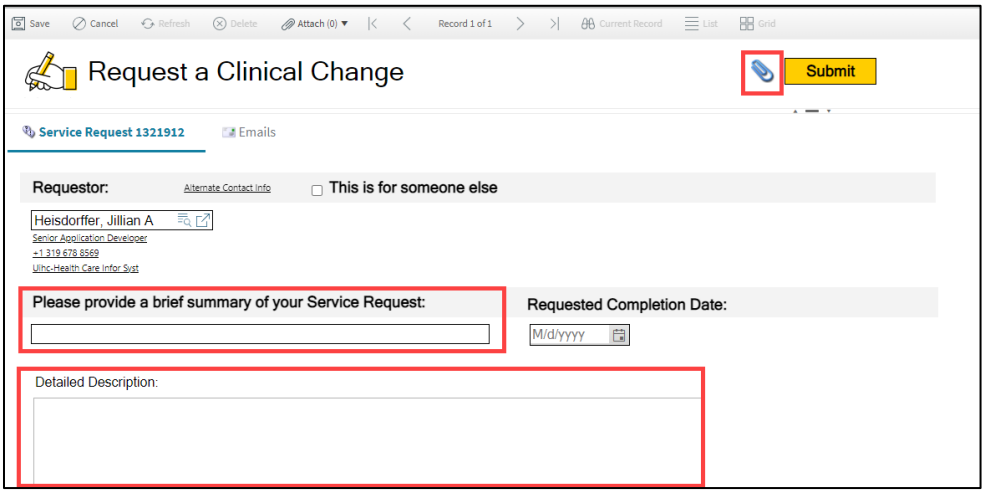
4. Click “Epic Assistance”




5. Click “Orders”




6. Fill out request details: provide study information including CRU# (if applicable), IRB#, IRB approval status, expected accrual, etc. Attach protocol and nursing notes (if applicable).



# Standard Request Process for Epic Orders

## Standard Order Questions:

| Question | Answer |
|---|---|
| 1. Research Study Name: | |
| 2. IRB# | |
| 3. CRU# | |
| 4. Has this study been fully IRB approved? If yes, attach the approved protocol. | |
| a. Date trial is open for accrual: | |
| b. Number of patients expected to accrue at our site: | |
| 5. Will the subject be seen in the CRU only or is there an inpatient/hospital outpatient component? | |
| 6. Who will be responsible for validating the build from the research study team? PI and coordinator? | |
| 7. Who will be placing/signing the orders from this research order set (i.e. LIP, nurse, study team)? | |
| 8. PI's contact Information for Call Parameter Orders | |
| 9. Primary coordinator's contact information for Initiate Order | |
| 10. Non-Med Orders Needed: | |
| a. Do you have paper orders for this study? If no, proceed to line b. | |
| b. Include: priority, frequency, any comments and/or additional details needed (i.e. special handling instructions for labs, color and/or number of lab tubes, type of PFT test etc.). | |
| 11. Medications: | |
| a. Has the new study medication been sent to the IDS Pharmacy? (**Note: study medication orders will only be added to Epic when the study has full IRB approval) | |
| b. Has the new study medication been sent to the IDS Pharmacy? (**Note: study medication orders will only be added to Epic when the study has full IRB approval) | |
| i. Include dose, route, frequency and any comments and/or additional details needed. | |

# Standard Request Process for Epic Orders

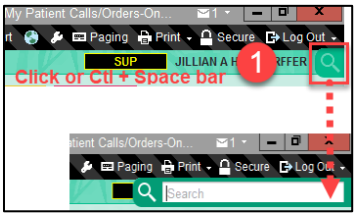
| | |
|---|---|
| ii. Will the medication be administered in the CRU or is it supplied to the patient? | |
| c. Are there other non-study medications needed? | |
| i. Include dose, route, frequency, and any comments and/or additional details needed. | |
| 12. Should the orders be preselected? | |

## Creating and Search User Saved sets:

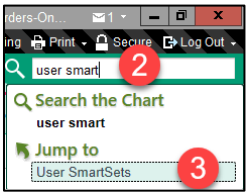
Users can create own versions of order sets and look up other user versions of order sets. Multiple versions, of the same set, can also be created.

### Create outside of a patient chart:

1. Use Chart Search, by clicking the magnifying glass in the upper right corner, or on the keyboard use CTL + Space bar

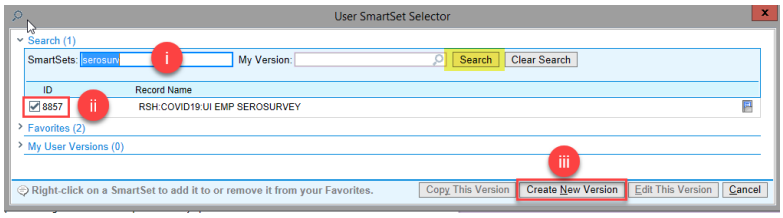



2. Type “User SmartSets”
3. Click on “Jump to…User SmartSets”.

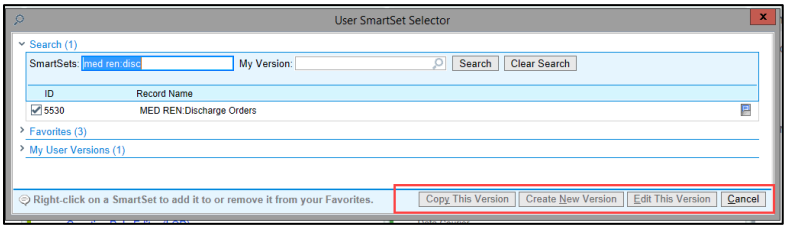


# Standard Request Process for Epic Orders

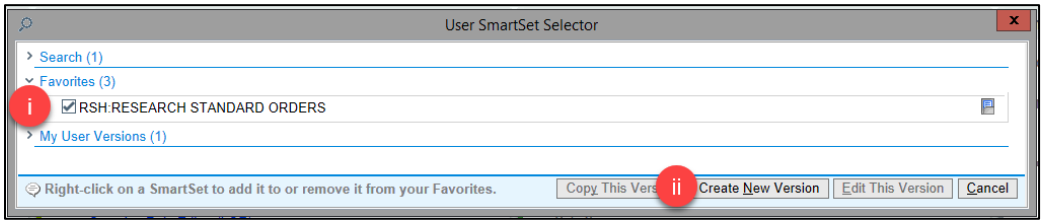
4. In the User SmartSet Editor, there are several options to customize SmartSets
   a. **Search**
      i. Enter search criteria and click Search
      ii. Select the checkbox next to the SmartSet
      iii. Click "Create New Version"




**Note, some SmartSets are not customizable and the buttons are greyed out.

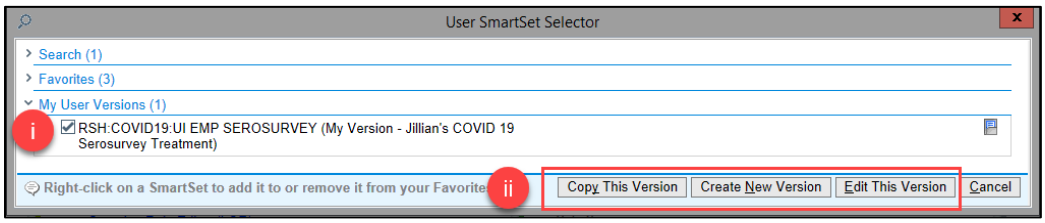



      iv. Customize the SmartSet ([Click for Instructions](#))
   b. **Favorites**
      i. Click the checkbox of the SmartSet
      ii. For favorites that are not owned by you and can be edited, select "Create New Version".




      iii. Customize the SmartSet (see #4 on page 5 for instructions)

   c. **My User Versions**
      i. Click the checkbox of the SmartSet
      ii. For "My User Version" SmartSets you can copy, create new version or edit the existing version.

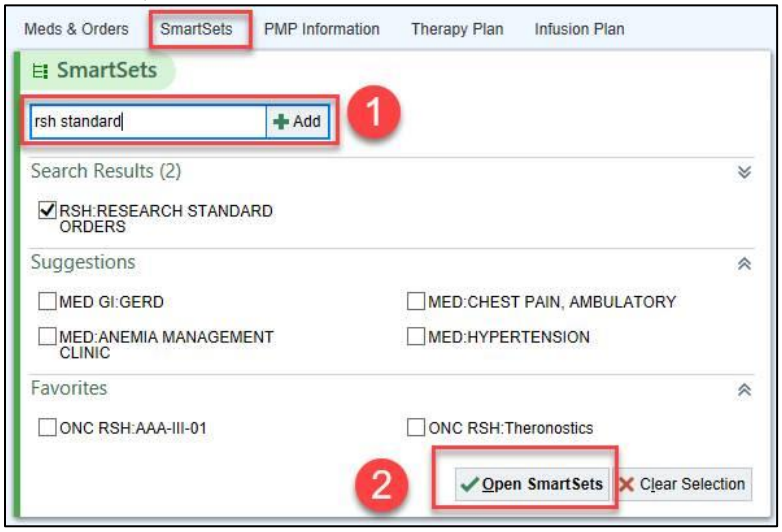


# Standard Request Process for Epic Orders

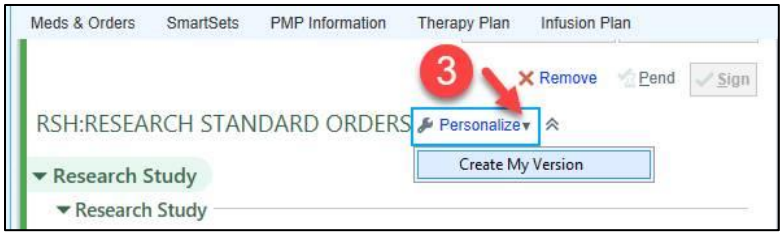
iii. Customize the SmartSet [(Click for Instructions)]

Create from within a Patient Encounter:

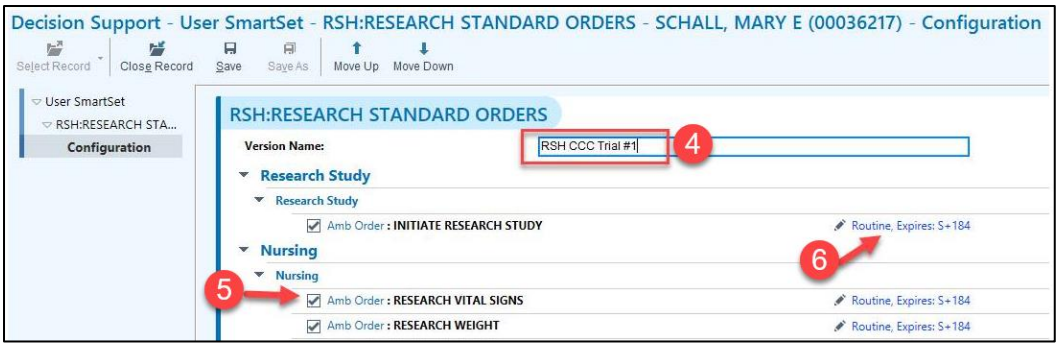
1. Locate the SmartSet activity and **search** for the order set you wish to personalize
2. Click **"Open SmartSets"** to open the set




3. Click the down arrow and choose **Create My Version**

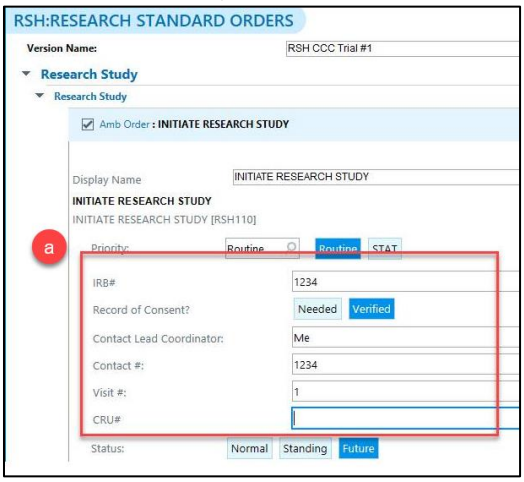



4. Create a **name** you would like to see when ordering
5. **Check** any orders by default
6. Click the '**Summary Sentence**' (routine/order details) to set any order defaults like questions and comments.

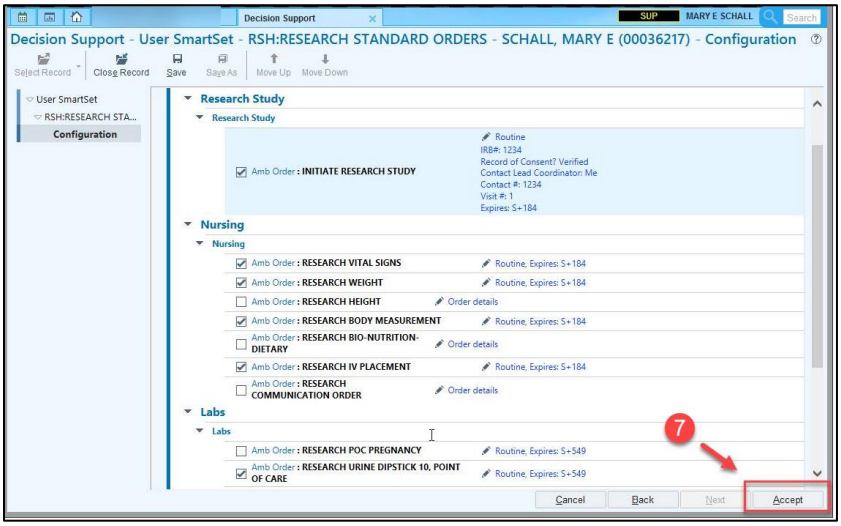


# Standard Request Process for Epic Orders

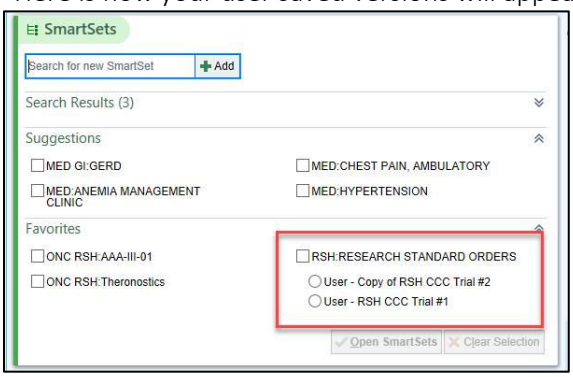
a. Enter order details, if needed.




7. When all edits are completed, Click **Accept**




- Here is how your user saved versions will appear:

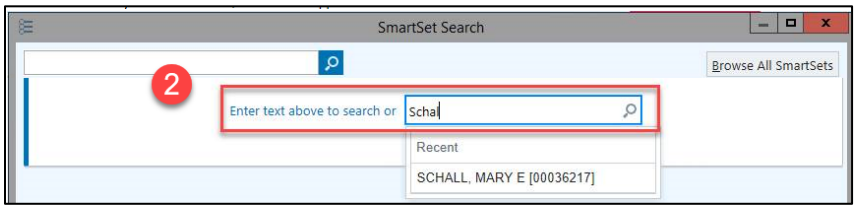


# Standard Request Process for Epic Orders

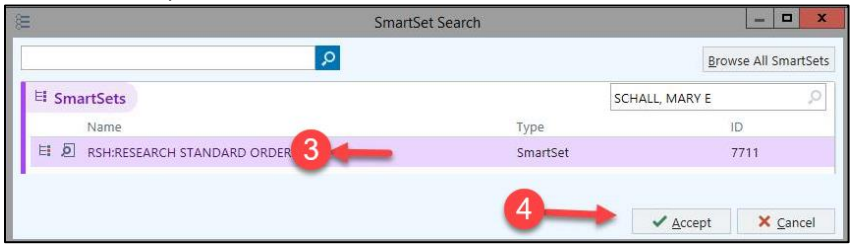
## Searching for other's user saved order sets

1. Click **Add** from SmartSets

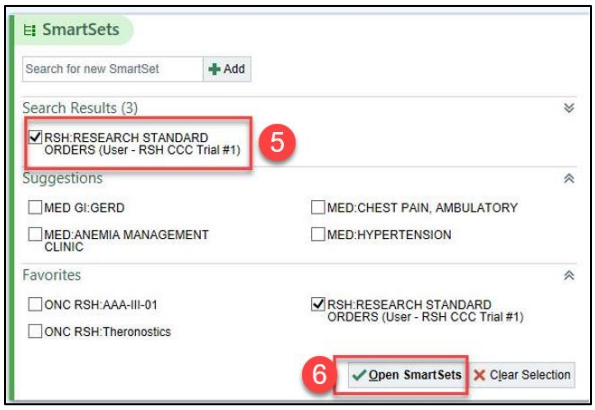

2. Enter **name** of user you wish to search, or search in upper left for the order set to see all user's versions




3. **Select** the order set
4. Click **Accept**




5. Note the Smart Set checkbox has been selected
6. Open **SmartSet**



# Standard Request Process for Epic Orders

7. Defaults will now show, feel free to **change** anything at this time


8. Click the **Personalize** to create your own version: Other options are available in the drop down and you can create multiple versions of the order set with different titles.