Instructor Guide: CPOE (Order Entry) for the Nurse

Trainer Notes

Section Name  Order Entry

Duration  45 minutes

Objective

- Learn about PowerPlans
- Benefits of CPOE
- Learn about Nurse Review

You’ll Need

- Parking Lot
- TRAIN Domain up
- Four individual orderables: Activity of bedrest, Diet Regular, and a TO for Motrin 200mg tab po q6h prn pain with meals. Initiate a pneumonia quality measure and a pneumonia care plan.
- Make sure PAL custom list is ready with your patient included.
- Job Aids
- Exercises

Other
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Introduction

- CPOE (Computer Provider Order Entry) is simply physicians and clinicians electronically entering orders.
- The paper orders are going away. That is not to say we won’t have a paper based chart. Some things are staying on paper like consents, physician progress notes, Blood transfusion, Rapid Response and Code Blue.

The Benefits

- Orders will be easily understood and interpreted.
- Reduces the time it takes to receive and respond to an order
- Reduces errors caused by illegible, handwritten orders and handwritten discharge prescriptions.
- Reduces errors through system alerts, notifying practitioners of patient allergies, drug to drug interactions and duplicate order entry. IMPORTANT STAT: A site in Palo Alto CA had a 20% decrease in mortality rate related to CPOE!

Increases patient safety with specific PowerPlans related to quality measures ex. Pneumonia, Heart Failure, AMI and SCIP (Surgery Core Improvement Project)

What is a PowerPlan?

A PowerPlan is a grouping- or list- of orders for an individual diagnosis or procedure. For example, a Hypoglycemia or Potassium protocol. They are our Order sets!

- PowerPlans are used for the planning and coordination of patient care.
- PowerPlans support standardized evidence-based practice for the treatment of a diagnosis, condition or problem.
- PowerPlans consist of one or more sub-phases (mini PowerPlans) to group orders.
- PowerPlans are time saving mechanisms for placing orders.
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Who will be Placing Orders?
ANY licensed personnel that has privileges to so. An NUS/HCA are NOT licensed personnel/able to enter enters.

- **Primary:** Physicians
- **Secondary:** Nurses will place Telephone Orders only in emergent situations when the physician is not next to a computer or is in a sterile environment.
- There will be situations where you are faced with the situation of placing a PowerPlan. The expectation in this situation is that the physician will need to stay on the phone with you during the entire ordering process to address any alerts or to address order details.
- Ancillary services such as Respiratory, Speech Therapy, Physical Therapy, Occupational Therapy and Dieticians will enter orders for the purpose of their job.

Getting Started
**ASK CLASS “WHO CURRENTLY ENTERS ORDERS?”** For those that are NOT currently entering orders, encourage them to start today and to review the recorded Webex on order entry located on the PPH Intranet.

1. Click on the Orders component. The Orders window appears.
2. Click on the “Add’ button” ; the Add Order window displays.

Review the Window: Dx/Problems/Lighthouse
1. **Review left pane:** Diagnosis (top) What is a diagnosis? **Specific to this visit**
2. Diagnosis entry is the responsibility of the physician, however, a nurse can enter this information **under the direction of a physician.** (On admit or post op)
3. **Select ADD button:** Type “pneu” in the Diagnosis window; select **Pneumonia; OK**
4. Enter Test, MDL; **ALL fields with an asterisk are REQUIRED!**
5. **Select** appropriate Clinical Service; Date defaults.
6. **Select** “Type” based on situation (i.e Admitting, Discharge etc)
7. **Confirmation** field should reflect “Possible;” Classification is Nursing.
8. **TO DELETE** a diagnosis; right click & select “Remove; you can also ADD this diagnosis to the Problem list following these steps.

**Lighthouse: Prevention Care Plans SAFETY ISSUE!**

1. **Problems** (bottom) What is a problem? **Lifetime event**

2. Falls & Pressure Ulcers are the 2 focused Patient Safety measures associated with Lighthouse.

3. The Problems pane will automatically be populated when assessment documentation indicates that the patient is at risk for falls and/or pressure ulcers.

4. To Add or Remove Problems, follow same steps as adding Diagnosis.

5. **What is Lighthouse?** It is a process improvement and automated reporting tool related to nursing documentation of Falls and Pressure ulcers. **In 6 months, PMC and POM had a combined total of 211 falls with an average cost of $135,000 per fall. That’s $2.8 million!**

6. When a Patient is at risk for a Fall or Pressure ulcers, **place the Prevention Care Plan** by simply clicking on the appropriate “Name of the Problem” that is underlined in blue.

7. From the Dx/Problem window, select “at risk for Pressure Sore”; Class question: **“How did pressure sore information get there?”** From documentation in IView.

8. Click on Care Plan (Pressure Ulcer Prevention Care Plan). Select Done.

9. Initiate the Care Plan; Orders for Signature, then Sign.

**Demo or do Lighthouse Morse Exercise**

- When completing the initial assessment of the Morse Fall Risk, you WILL receive “discern notifications” from the system.

- **READ** why you have received a notification.

- If you’re the 1st RN documenting an Assessment, the alert indicates that the patient is at risk. **Where will you find prior documentation of a fall or pressure ulcer?** **IVIEW!**
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Entering Orders using PowerPlans

What is a PowerPlan? A PowerPlan is a group of orders based on diagnosis, with the most common orders pre-checked; additional orders are available by placing a checkmark in front of each order required.

1. Click on the “Add’ button”, ; the Add Order window displays.
2. Point out the folders in the orders window (right hand side)
3. Select the PowerPlans folder
4. Point out the Icon , it is the same for both PowerPlans and Care Plans, however, Care Plans will be stated in the title.
5. The most efficient way to search for a single order is to type a partial name.
6. Type “Pneu” in the Find box; change the search window to “Contains”.
7. A list of orders that contain “Pneu” displays.
8. Click on the “Pneumonia” PowerPlan; the order turns blue; Click on the button.
9. Point out the orders are divided into sections by blue bands such as: Condition, Consults, Patient Care, Medications, etc. for ease of ordering.
10. There are 5 order priorities; STAT, ASAP, Routine, Timed and AM that are standard across the organization.
11. STAT and ASAP have different definitions depending on the department, such as Lab STAT is different than a Rad STAT.
12. Select or deselect orders by clicking in the boxes next to the orders.
13. There are some orders that cannot be removed notated by gray box. Just like our Careplans ☺.
14. Click on Merge View button. This brings all orders / all status into the plan to compare for duplicate orders! The other orders will have a dark blue band and display (other) next to the section name.

15. Click on Merge View again to return to the Pneumonia PowerPlan.

Adding to Phase

- If an order is not available in the PowerPlan, you can “attach” an order to the existing plan or “Add to Phase”.
- “Adding to phase” is beneficial as it makes it easier to manage a whole group of orders when discontinuing the PowerPlan.

1. Click the Add to Phase button and select the “Add Order”; The Add Order window displays.

2. Type “Ambulate” in the Find box and click on ambulate. The order turns blue and an order sentence window displays.

3. Ask a Student: “What is an order sentence?” It is the order details that tell you who, what, when and where. Some orders have prebuilt order sentences for ease of ordering. Some orders require you to BUILD the order sentence.

4. Select “T,N Assist of 2”; Click “OK”.

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5. Click “Done”; the Orders page displays; REVIEW THE ORDER SENTENCE

View Orders Window (Navigator)
1. Point out in the Navigator the plans are in categories AND where you can check the status of the Plan. Examples: planned, planned pending, or initiated- which we will discuss in a minute.

PowerPlan Status
Do not initiate! Review the 3 PowerPlan status:

<table>
<thead>
<tr>
<th>PowerPlan Status</th>
<th>Description</th>
</tr>
</thead>
</table>
| Planned Pending  | • The PowerPlan is not yet been placed in a planned state.  
• **Right click:** You can Initiate or remove the PowerPlan in this state. |
| Planned          | • Orders are not active yet.  
For example, a patient that is in the ER- the orders will be in a planned state until they come to the floor.  
• **Right click:** You can Discontinue or Void the PowerPlan in this state.  
• **Show Plan Info** |
| Initiated        | • Orders are activated.  
Patient **MUST BE** on the correct inpatient unit before the plan is initiated.  
• **Right click:** You can Discontinue or Void the PowerPlan in this state.  
• **Show Plan Info** |
Modifying Order Details in PowerPlans (Planned Pending State)

All orders can be modified to suit the specific needs of your patient.

1. Check the box in front of the CBC with Diff order; right click and select “Modify Planned Order”.

2. When a Verbal or Phone order is given, you will enter the provider’s name that gave you the order. These orders will go to the physicians Orders to approve InBox for cosigning. Enter TEST, MD; TO Read Back

3. Click “OK”. The Order Detail window opens. If it doesn’t, click the up arrow to expand the window.

4. In the Order Details window, select frequency; qAM, Duration; 3, And Duration Unit; Day; close the window; Click on the button. REFRESH!

5. Notice the light bulb and the word “initiate” in front of the PowerPlan. This indicates the plan still needs to be initiated.

6. THIS POWERPLAN IS NOW IN A PLANNED STATE!
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PowerPlans in the Planned Stage
- When orders are signed before being initiated, the PowerPlan will be in the “Planned” stage.
- The orders are not active, and only become active when the plan is initiated.
- This can be used for preadmission orders, when the patient is going to be a Direct admit, Surgical admit or in the ED and is not yet physically on the inpatient unit.
- Once the patient is in the correct location, the plan can be initiated.

Initiating PowerPlans
- When the patient is in the correct inpatient location. The plan may be initiated. **Class Question:** “How will you know if patient is in the right location?” Answer: Demographic bar and **THE PATIENT IS PHYSICALLY IN THE ROOM!**
- You must initiate the PowerPlan to place the orders (make active).

1. Click the “Initiate” button.

2. If there are required details (blue circle with the x), fill in now. Notice the checked boxes have a light bulb in front of them- this indicates which orders will be placed in the PowerPlan.

3. Review your orders for accuracy. Review and change any order details needed. **Note:** If nursing is placing orders for the physician, the physician is required to be on the phone during the entire ordering process.

4. Click on “Orders for Signature” button when complete. The Orders for Signature window displays. Click “Sign” button; **REFRESH!**
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Exercise 1, 1a and 1b
Instructor: Hand out class Exercise 1, 1a and 1b. When students are done with the exercise, select individuals in class to answer the following questions:

1. **Q:** What is the difference between an order and a PowerPlan?
   **A:** An order is singular and a PowerPlan is a group of orders.

2. **Q:** What does the icon ‼️ indicate?
   **A:** Rx verify Indicator- the Rx prescription icon means that the order is subject to pharmacy review and has not yet been verified.

3. **Q:** Can we give Medications that Pharmacy has not yet verified?
   **A:** Yes only in emergent situations otherwise wait for the pharmacy to review.

4. **Q:** When the PowerPlan is in the planned state are the orders active?
   **A:** No

5. **Q:** When the Pneumonia PowerPlan is in the status of Initiated in the navigator what is the order status?
   **A:** Ordered.

6. **Q:** What does the order status of ordered mean?
   **A:** The orders become active and go to the appropriate departments in the hospital to be carried out.

Sub-Phases within PowerPlans

- A sub phase is a group of orders embedded within a plan as a single component. It’s a mini PowerPlan.

- It allows you to manage a **subset of orders** within a plan and can be used in multiple plans.

- The Plan displays the name of the parent plan and the sub-phase name indented under the previous level. Just like our care plans.

- **Point** out the sections of the pneumonia care plan as an example of a sub-phase.

- To view the components of a sub-phase select the sub-phase within the plan (which is identified by the symbol [ ] of 2 yellow boxes with colored dots.
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Steps:

1. Place the **Admit Med Surg PowerPlan**.

2. Click "Done"; the PowerPlan displays.

3. Scroll down to the "IV Solutions" section of the PowerPlan.

4. Place a check mark in the box of the subphase IV fluids-Maintenance. The subphase opens.

5. Review the subphase and prebuilt order sentences

6. Select the "Sodium Chloride 0.45%" order.

7. Right-click on order line and select "Modify Planned Order". The Ordering Physician window appears.

8. Fill in ordering physician and click "OK".
9. The Order Detail window displays.

10. Point out the order detail window tab, “Continuous Details”.

11. Since ordering medications is new, we want you to become familiar with these views. This tab is where you can change the rate of the IV infusion and this table will calculate the infuse over for you.

12. Change the rate to 100 ml/HR, to demonstrate the Infuse over change.

13. Click on the Details tab.

14. The detail window opens. This is where you can change other details of the order.

15. Click on the down arrow to close the detail window.

16. Click the “Return to General Surgery Postop Med-Surg-IMC.” button.

17. The PowerPlan displays. Notice the sub-phase is listed under the PowerPlan in the Navigator.

18. Click the “Orders for signature” button; the Ordering Physician window opens.
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19. Fill in any required details. Point out the Missing required details button. This is a quick way to enter missing details. When the button is clicked on the missing details are displayed.

**Instructor Note:** point to the Dx table button and explain that this is for diagnosis info and we will not be using this function at this time.

20. Click “Initiate”. The PowerPlan and Sub-phase are now initiated.

**Changing PowerPlans after they have been Initiated – or-**
**Adding to a PowerPlan after it has been Signed**
After you have signed a plan and then decide you want to go back and activate another order within that plan, click on the View excluded components icon.

1. Click on the 2 yellow light bulbs. The excluded components in the PowerPlan displays. Scroll to anti infective section and select antibiotic module sub-phase.

2. Click on the Ancef order (click on the box) to add to the Plan.

3. Click on the drop down arrow and select an order sentence for the dosage and frequency.

4. Enter “Test, MDL” for ordering physician.

5. Click “OK”. The Orders for Signature window displays with a light bulb next to the order selected.

6. Fill in any missing required or additional details.

7. Click “Orders for Signature”.

8. Click “Sign”.
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9. Click “Refresh”. Ancef now has a checkmark next to the order and the status of the order is “Ordered”.

![Image of medication order with checkmark and status]

10. Click the icon with the 2 yellow light bulbs.

11. The excluded components in the PowerPlan disappear and the orders display.

![Image of PowerPlan orders]

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Discontinuing PowerPlans

There will be instances when you’re required to discontinue a PowerPlan and all of its components. *(Please check with YOUR department to learn what instances constitute discontinuing a PowerPlan)*

1. Right-click the plan from the Navigator.

2. Right-click and select “Discontinue”.

3. The Discontinue window displays. The discontinue screen allows the user to place a check on any orders that they wish to keep for the patient’s care.

4. Review all orders to be discontinued.

5. Click “OK”. The Ordering Physician window appears.

6. Select “Test, MDL” as the physician and click “OK”. Discontinue pending window displays point out the status of the order is Discontinued.

7. Click on any orders with required details and fill in discontinue reason: “Pt discharged”.

8. Click “Orders for Signature”.

9. Click “Sign” and refresh screen. All the orders within that plan and all sub-phases selected will be in “Discontinued” status.
Extra Information
Order for OB stool X3- 1st collected stool collected completes the original order. The subsequent collects will need additional orders until all three are complete. The order must be placed as a written order in the communication type.

Restrain orders- To discontinue restraints, the physician must discontinue the order. There is no order for discontinue. When the physician discontinues the order, the tasks on the nursing Task List go away.

Favorite Folders
Users can create Favorite folders for frequently used Diagnosis found on their units. Information on creating a favorites folder is located on the PPH Intranet under “Help & Guides.”

Launching a Medline Search
Users can search Medline online for information on a selected diagnosis or problem. Information on how to launch a Medline search is located on the PPH Intranet under “Help & Guides.”

We encourage each staff member to begin entering their own orders TODAY!