

Orders - Favourites - Workflow

Scenario

Adding, customising, and sharing favourites when using orders via the workflow in PowerChart

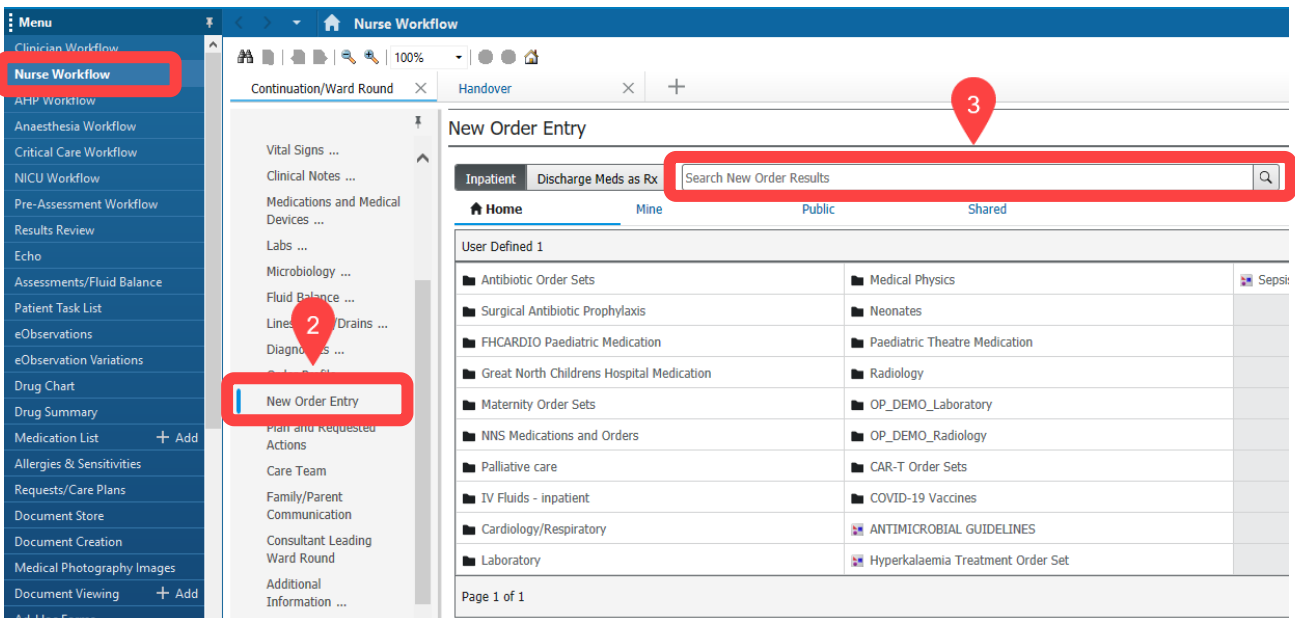
Instruction



Favourites are specific to the type of patient encounter they are set against.

You will have one list for Inpatients and one list for Outpatients. If you work with both, please set up your favourites using an Inpatient record and then using an Outpatient record (or vice versa).

Adding Favourites



The screenshot shows the 'Nurse Workflow' interface. A red circle with the number 1 highlights the 'Nurse Workflow' menu item in the left sidebar. A red circle with the number 2 highlights the 'New Order Entry' option in the component menu. A red circle with the number 3 highlights the 'Search New Order Results' field in the 'New Order Entry' section.

1. Open **PowerChart**, open the patient record and select your workflow (Clinician, Nurse, AHP, etc).
2. Locate **New Order Entry** in the component menu to the left of the workflow tab you are currently using.
3. Use the "**Search New Order Results**" field to search for the medication, test or referral you wish to add to your favourites.

4. Click on the **star** to the right of the medication or order you wish to save to your favourites. A pop-up window should now appear with a favourites folder. Click the folder.

5. Click the **Add** button to add your selection to your favourites.

The screenshot shows the 'New Order Entry' interface. At the top, there are tabs for 'Inpatient', 'Discharge Meds as Rx', and 'MRSA'. Below this is a search bar and a 'Search Results' tab. A table lists 'Top 14 Matches' for 'MRSA Screen'. A red circle with the number 4 points to a star icon next to one of the orders. A red circle with the number 5 points to the 'Add' button in a pop-up window titled 'Add this favourite to:'. The pop-up window shows a list of folders: 'Favourites' and 'HCA'. The 'Add' button is highlighted with a red circle.

6. If you have no favourites folder, go to the **Requests/ Care Plans** screen, click on **+Add**, search for an order then right click it and select **Add to Favourites**. This will force the system to create a folder for you and you will then be able to add favourites from the workflow as normal.

The screenshot shows the 'Requests/Care Plans' screen. A red circle with the number 6 points to the '+Add' button in the top left corner. The screen displays a list of orders for 'Matrix Orders' and 'PowerOrders'. The 'Matrix Orders' section is expanded, showing a list of orders with checkboxes for 'Bed Management', 'Blood Products and Transfusion', 'Non Categorised', 'Patient Status', 'Vital Signs', 'Activity', 'Diet', 'Patient Care', 'IV Solutions', 'Medications', 'Laboratory', 'Radiology', 'Nuclear Medicine', 'Diagnostic Tests', 'Consults', 'Caresets', 'Scheduled Theatres Procedures', 'Non Theatre Procedures', 'Special', and 'Medical Supplies'. The 'Medications' section is checked.

The screenshot shows the 'Add Order' window for 'ZZZGAMGEE, SAMWISE'. The window displays patient information: 'MRN:91650940', 'DOB:01/Jan/80', 'NHS: ** No Known Allerg...', 'Weight: Fin#:12002543', 'Resus:For CPR', 'Loc:RV22: B05; 02', 'Inpatient (20/Dec/2...', 'EDD:'. A search bar contains 'mrsl'. Below the search bar, there is a list of orders. A red circle points to the 'Add to Favourites' button next to the 'MRSA Screen' order.

Custom Favourites

1. **Before you sign** an order, select the order and fill out the missing required details as required.

Order for Signature

Order Name	Status	Start	Details
RV22; B05; 02 Fip#12002543 Admit: 20/Dec/2022 11:27 GMT			

Urine Microbiology (MSU Culture) Order 17/Apr/2023 09:03 Collected Immediately, 17/Apr/23 09:03 BST, Routine, Print Label, Hold Until Collected BST

Details for Urine Microbiology (MSU Culture)

Details Order Comments

+ -

*Nature of current symptoms of infection (not dipstick):

*If catheterised, when was catheter placed:

Supporting information (min 7 characters):

*Collected immediately: ☒ Yes ☐ No

*Ward/OPD Staff to collect: ☐ Yes ☐ No

*Risk factors/Complicating factors:

*Current / Intended Antimicrobial Therapy (be sp...):

*Specimen Type:

*Collection Date and Time: 17/04/2023 0903 BST

6 Missing Required Details

2. The details are populated in the order in the top section as they are completed in the lower section. At any time, **right click** on the order at the top and select **Add to Favourites**.

Orders for Signature

Order Name	Status	Start	Details
RV22; B05; 02 Flap:12002543 Admit: 20/Dec/2022 11:27 GMT			
Unine Microbiology (MSU Culture)	Order	17/Apr/2023 09:03 BST	Suspected, Diabetes, N/A, Amoxicillin, Unine, Mid Stream, Collected Immediately, 17/Apr/23 09:03 BST, Ward/OPD Staff to collect, Routine, Print Label, Hold Until Collected

Details for Urine Microbiology (MSU Culture)

Details | **Order Comments**

***Nature of current symptoms of infection (not dipstick):**

***If catheterised, when was catheter placed:**

Supporting information (min 7 characters):

***Collected Immediately:** ☒ Yes ☐ No

***Ward/OPD Staff to collect:** ☒ Yes ☐ No

***Risk factors/Complicating factors:**

***Current / Intended Antimicrobial Therapy (be sp...):**

***Specimen Type:**

***Collection Date and Time:**

3. This will save the order as a favourite with the order details already completed.

- Now you can select this pre-completed order from your favourites in the Workflow. This will save you having to complete the order details every time when placing orders or prescriptions that are common to you.

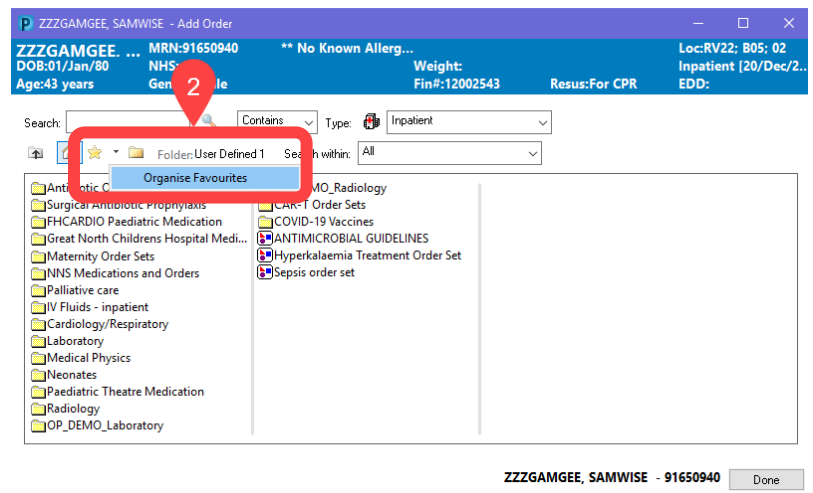
Creating Favourites Folders

This process needs to be completed via either **Requests/Care Plans** or **Medication List** from the main menu within the patient record.

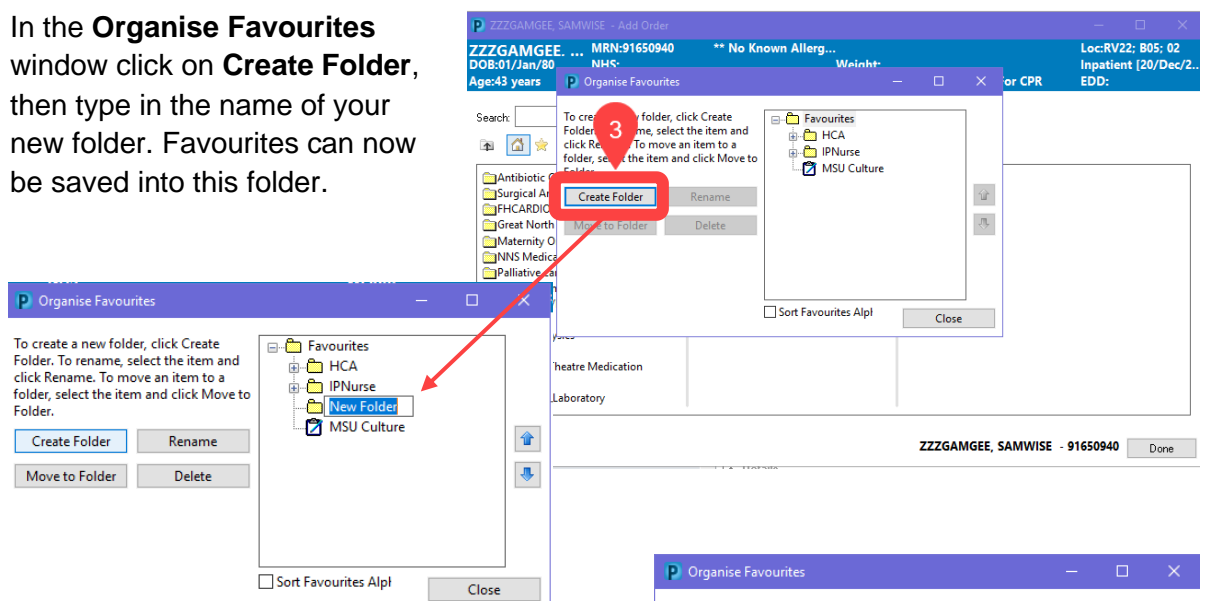
1. Click on **Add**. The Orders box will open.

The screenshot displays the 'Requests/Care Plans' interface. On the left, a sidebar menu lists various system functions, with 'Requests/Care Plans' selected and highlighted by a red rectangle. The main area is titled 'Requests/Care Plans' and features a red circle with the number '1' pointing to a '+ Add' button. Below this, there are tabs for 'Orders', 'Medication List', and 'Document in Plan'. The 'Orders' tab is active, showing a list of orders for 'John Doe'. The list includes columns for 'Order Type', 'Status', 'Priority', 'Due Date', and 'Action'. A 'View' button is located at the bottom right of the list. The 'Orders' list shows several entries, including 'Bed Management', 'Blood Products and Transfusion', 'Non Categorised', 'Patient Status', 'Vital Signs', 'Activity', 'Diet', 'Patient Care', 'IV Solutions', 'Medications', 'Laboratory', 'Radiology', 'Nuclear Medicine', 'Diagnostic Tests', 'Consults', 'Caresets', 'Scheduled Theatres Procedures', 'Non Theatre Procedures', 'Special', and 'Medical Supplies'. The 'Patient Care' and 'Medications' rows are highlighted in blue.

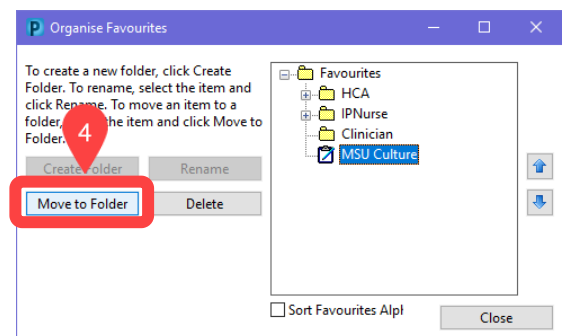
- Click on the down arrow to the right of the gold star then click on **Organise Favourites**.



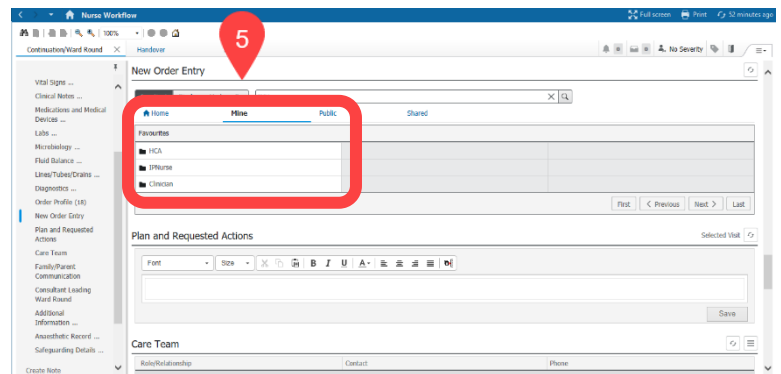
- In the **Organise Favourites** window click on **Create Folder**, then type in the name of your new folder. Favourites can now be saved into this folder.



- To arrange favourites you have already set, highlight the order you wish to organise then click on **Move to Folder**



- When you click on **New Order Entry** in your workflow and then click **Mine** or **My Favourites**, your new folder will be visible.

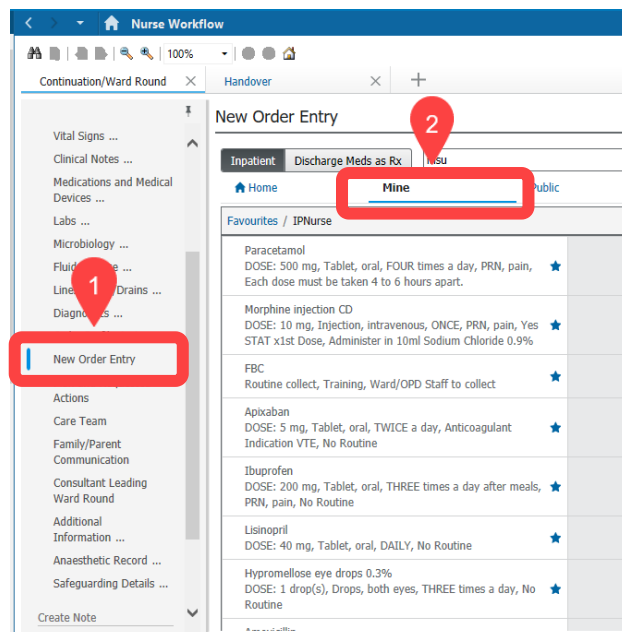


Using Favourites

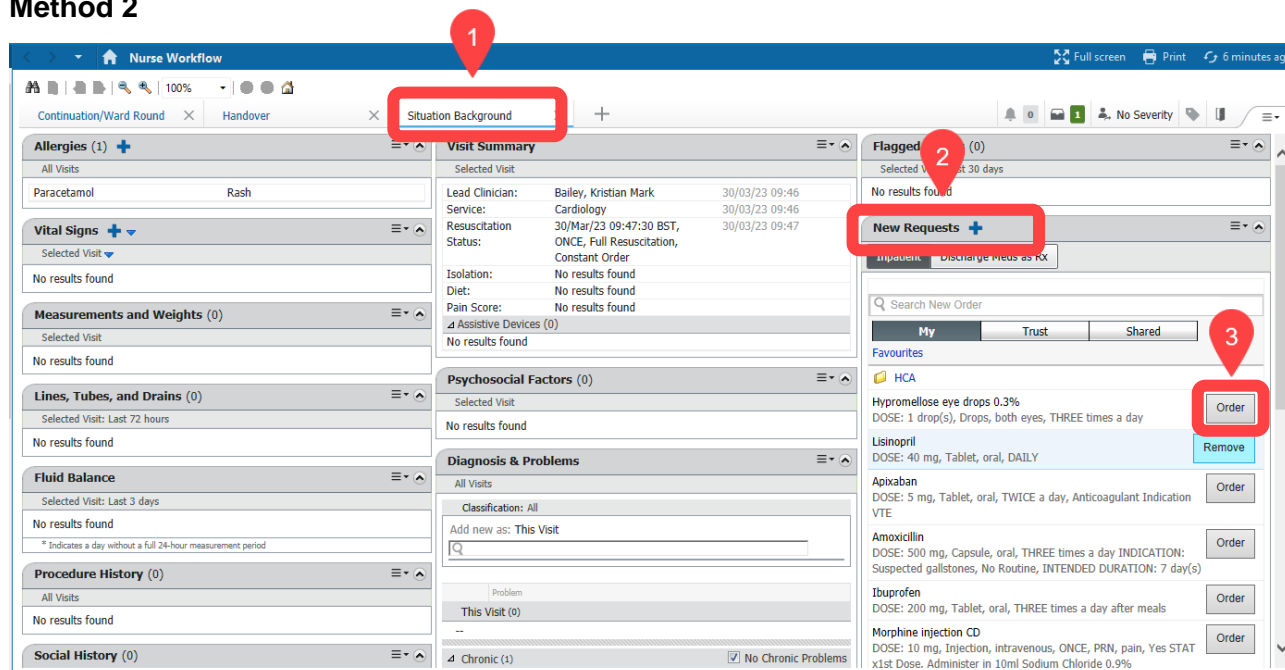
There are two methods for accessing your favourites when using the workflow.

Method 1

1. Select the **New Order Entry** workflow component from any relevant workflow tab.
2. Click on the **Mine** or **My Favourites** tab immediately under the search box.
3. Select a favourite to order by clicking on it **once**.



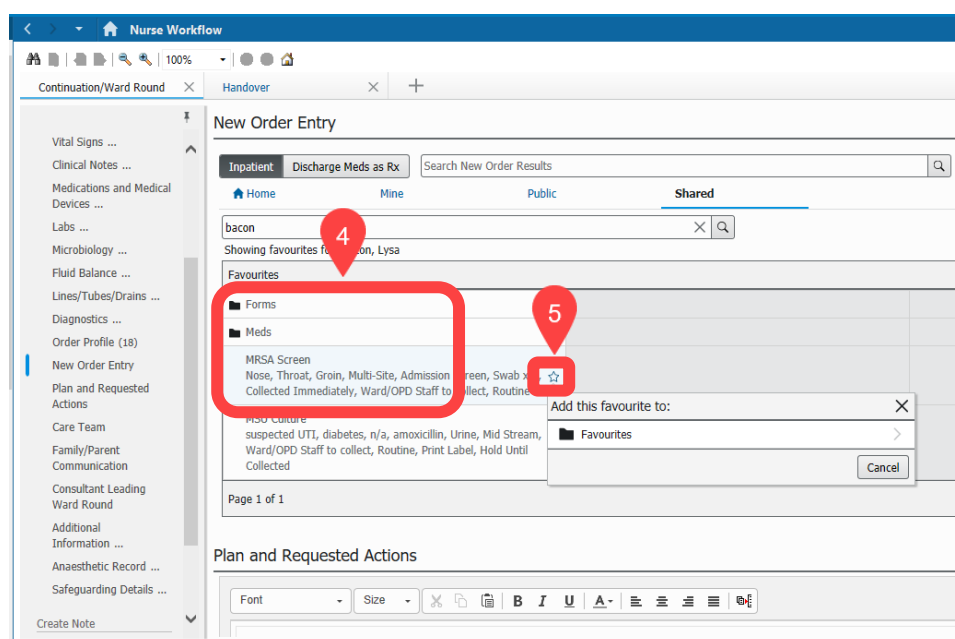
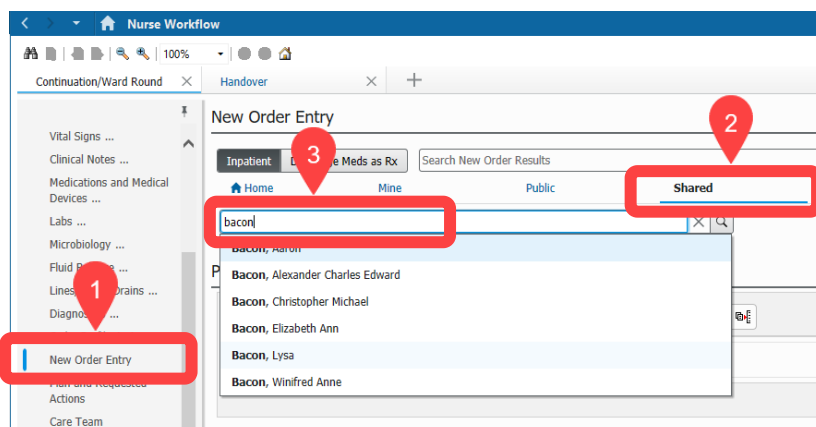
Method 2



1. If available, select the **Situation Background** tab in your workflow.
2. Your Favourites will be available in **New Requests**.
3. Select a favourite to order by clicking on **Order**.

Sharing Favourites

1. Locate **New Order Entry** in the component menu to the left of the workflow tab you are currently looking at:
2. Open the **Shared** tab
3. **Search** for the member of staff whose favourites you wish to use



4. **Select** the Favourite folder or item that you wish to use

Follow the steps below if you wish to copy the item to your own Favourites

5. Click the **star** to the right of the item
6. Select the folder you wish to add the item to
7. Click the **Add** button. This item will now display in your own Favourites folder