

CLINICAL AMBULATORY ORDER TRACKING WORKLIST

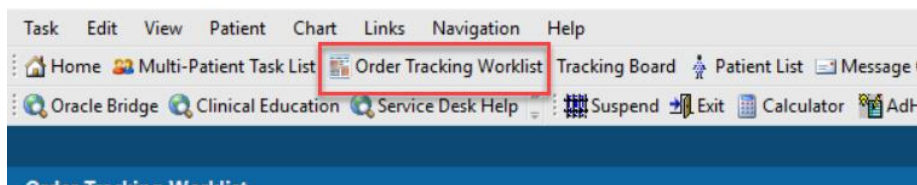
The **Order Tracking Worklist** is a cloud multi-patient worklist consisting of multiple columns to track patient orders from placement to completion. It allows you to ensure that orders are not incomplete.

Worklists can be configured by the ordering location, ordering provider, order time frames, order statuses, and specific orders excluding medications. From the worklists, order information can be reviewed, orders can be completed, orders can be canceled, or orders can be removed from tracking.

Value Added: Provides visibility to ensure ordered patient interventions don't get overlooked.

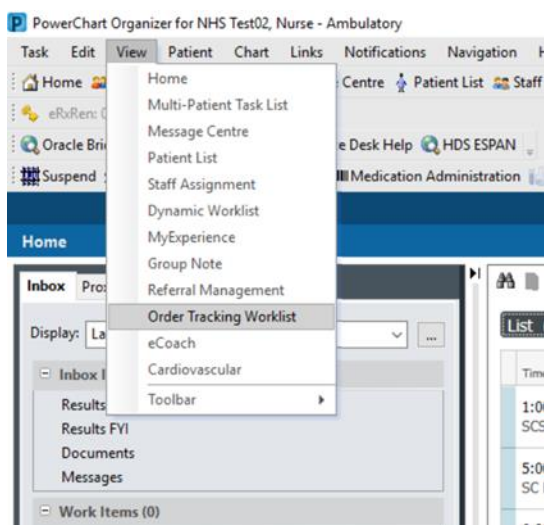
Note: All orders that have been discontinued or completed are displayed for 30 days, after which they are automatically removed.

If not currently on toolbar as shown

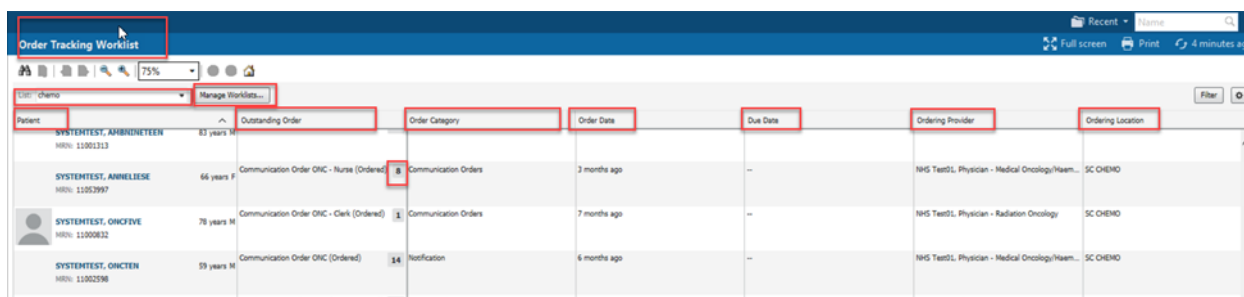


Select View on the toolbar.

From the drop down select Order Tracking List



The Order Tracking Worklist



Patient	Outstanding Order	Order Category	Order Date	Due Date	Ordering Provider	Ordering Location
SYSTEMEST, AMBINEETEN MRN: 11901213	83 years M					
SYSTEMEST, ANNELESE MRN: 11952997	66 years F	Communication Order ONC - Nurse (Ordered) 8	Communication Orders	3 months ago	NHS Test01, Physician - Medical Oncology/Haem...	SC OHED
SYSTEMEST, ONCFEVE MRN: 11900832	78 years M	Communication Order ONC - Clerk (Ordered) 1	Communication Orders	7 months ago	NHS Test01, Physician - Radiation Oncology	SC OHED
SYSTEMEST, ORCTEN MRN: 11902598	39 years M	Communication Order ONC (Ordered) 14	Notification	6 months ago	NHS Test01, Physician - Medical Oncology/Haem...	SC OHED

Patient column: This column displays the patients on the worklist. Selecting the Patient heading sorts the worklist by the patient names in alphabetic or reverse alphabetic order. Selecting a cell in the Patient column opens a view only patient details pane that contains demographic and registration information.

Outstanding Order column: This column displays the most overdue outstanding order or the order with the closest due date for the patient in the worklist.

- The order status and departmental status of the order is displayed in parentheses, for example, Bilirubin Total (Future(On Hold)).
- Overdue orders are displayed in red text with an Overdue status.
- The number in the column is the total number of outstanding orders for that patient.
- Selecting the Outstanding Order column heading sorts the worklist by the medication names in alphabetic or reverse alphabetic order.
- Selecting a cell in the Outstanding Order column opens a patient details pane where the user can complete actions on orders.

Order Category column: This column displays the activity, sub-activity, or catalog type of the order. Selecting the Order Category column heading sorts the worklist by the medication category type in alphabetic or reverse alphabetic order. Selecting a cell in the Order Category column opens a patient details pane where the user can complete actions on orders.

Order Date column: This column displays how many days before the present date that orders were made. Selecting the Order Date column heading sorts the worklist by order date in chronological or reverse chronological order. Selecting a cell in the Order Date column opens a patient details pane where the user can complete actions on orders.

Due Date column: This column displays how many days from the present date that the orders are due. Dates in red indicate that the order is overdue. Selecting the Due Date column heading sorts the worklist by due date in chronological or reverse chronological order. Selecting a cell in the Due Date column opens a patient details pane where the user can complete actions on orders.

Ordering Provider column: This column displays the name of the provider who made the order. Selecting the Ordering Provider column heading sorts the worklist by the provider's name in alphabetic or reverse alphabetic order. Selecting a cell in the Ordering Provider column opens a patient details pane where the user can complete actions on orders.

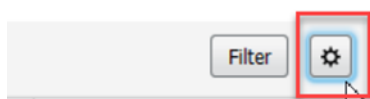
Ordering Location column: This column displays the name of the location where the order was made. Selecting the Ordering Location column heading sorts the worklist by the location name in alphabetic or reverse alphabetic order. Selecting a cell in the Ordering Location column opens a patient details pane where the user can complete actions on orders.

Customizing the Order Tracking Worklist

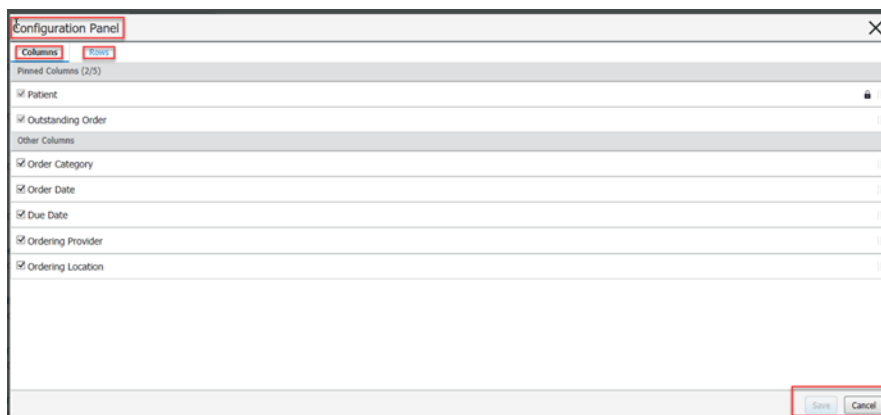
Customizing the Order Tracking worklist allows users to select which columns are displayed and how many rows of information are displayed at once.

Complete the following steps to customize the Order Tracking worklist:

1. Select the **settings** button. (R corner)



2. The Configuration Panel is displayed.



3. Select the **Columns** tab. Ensure that the check boxes for the columns that you want to display on the worklist are selected.
4. Deselect the check boxes for the columns that you want to remove from the worklist.

Note: The Patient and Outstanding Order columns are pinned columns and cannot be deselected.

5. Select the **Rows** tab.
6. Select the option for the number of rows to be displayed in the worklist (**1, 2, 3, 4, or 5**).
7. Select **Save**. The Configuration panel closes, and the system displays the customized version of the worklist. If you select **Cancel**, the Configuration panel closes and the changes are not applied.

Filters can be applied to the Order Tracking worklist to organize how information is displayed. The following filter categories are available:

- Patient (free-text box)
- Outstanding Order (includes both an Enter Order Name free-text box and an Order Status list)
- Order Category (free-text box)
- Order Date (requires a free-text number entry and selection of a unit of time from a list)
- Due Date (requires selection from a list of statuses)
- Ordering Provider (free-text box)
- Ordering Location (free-text box)

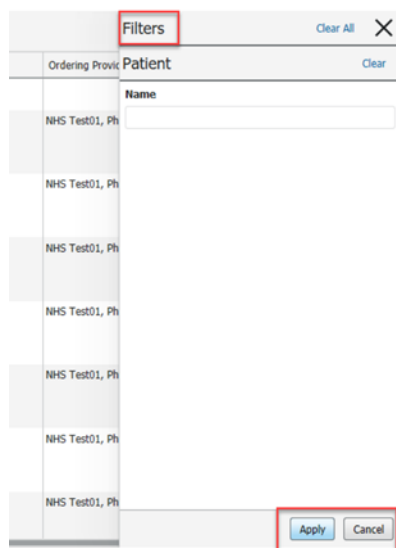
Applying Filters

Complete the following steps to apply a filter to the Order Tracking worklist:

1. Select **Filter**.



2. The Filter pane is displayed.



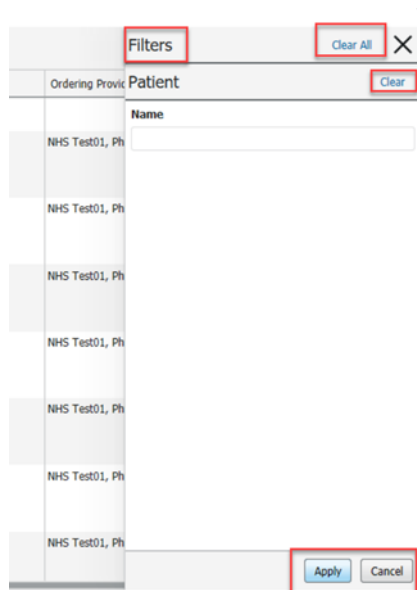
3. Enter any required free-text information or select the required list options for one or more filters.
4. Select **Apply**. The Filter pane closes, and the worklist is displayed using the applied filters. The following information message is displayed above the list: **Worklist is Filtered. Some data may not be displayed.**

Removing Filters

When filters have been applied to the worklist, a Clear Filters option is displayed. Selecting **Clear Filters** removes any filters from the list.

Complete the following steps to remove an individual filter from the worklist:

1. Select **Filter**. The Filter pane is displayed.
2. Select **Clear** next to the filter category that you want to remove. Optionally, all filters can be removed by selecting the **Clear All** option.



3. Select **Apply**. The worklist is displayed without the removed filter.

Selecting a Worklist

Complete **one** of the following steps to select a worklist:

- Select which worklist to display from the List options.

Select **Manage Worklists**. The Manage Worklists dialog box is displayed

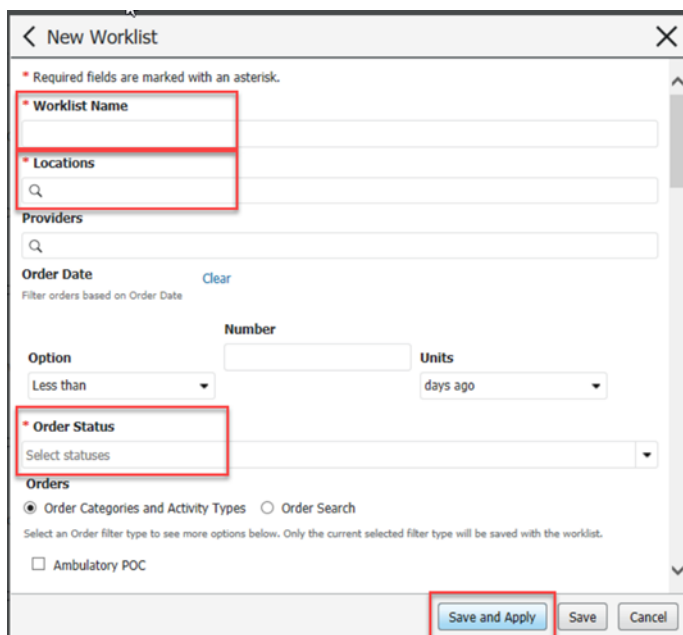


- Select **Apply** next to the worklist that you want to display. The Manage Worklists dialog box closes and the selected worklist is displayed.

Creating a Worklist

Complete the following steps to create a new worklist:

1. Select **Manage Worklists**. The Manage Worklists dialog box is displayed.
2. Select **Create New Worklist**. The New Worklist dialog box is displayed.



The screenshot shows the 'New Worklist' dialog box with the following fields and options:

- Worklist Name**: A text input field with an asterisk indicating it is required.
- Locations**: A search input field with a magnifying glass icon and an asterisk.
- Providers**: A search input field with a magnifying glass icon.
- Order Date**: A date input field with a 'Clear' button and the text 'Filter orders based on Order Date'.
- Option**: A dropdown menu with 'Less than' selected.
- Number**: A text input field.
- Units**: A dropdown menu with 'days ago' selected.
- Order Status**: A dropdown menu with 'Select statuses' selected and an asterisk.
- Orders**: A section with two radio buttons: 'Order Categories and Activity Types' (selected) and 'Order Search'. Below this is a note: 'Select an Order filter type to see more options below. Only the current selected filter type will be saved with the worklist.' There is also a checkbox for 'Ambulatory POC'.
- Buttons**: 'Save and Apply', 'Save', and 'Cancel' buttons at the bottom right.

3. Enter a Worklist Name and Location. Providers and order types can be added but are not required.

Note: In the Orders section, a user can select orders from only one of the following options:

- Order Categories and Activity Types
- Order Search

If a user has orders selected in multiple options, only the orders in the selected option are saved. If you do not select anything in the Orders section, then all qualifying orders are displayed on the worklist.

4. If you select **Save and Apply**, the new worklist is saved and displayed in the Order Tracking window. If you select **Save**, the new worklist is saved, and the Manage Worklist dialog box is

displayed. If you select **Cancel**, the new worklist is not saved, and the Manage Worklist dialog box is displayed.

5. Select **Close** or **X** to close the Manage Worklist dialog box.

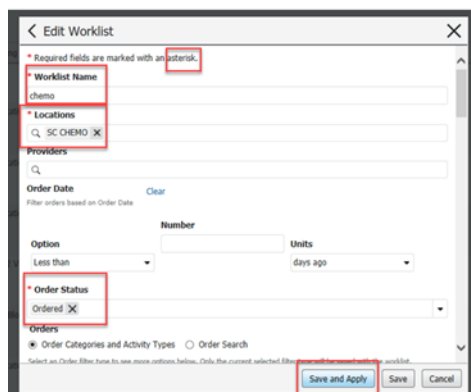
Editing a Worklist

Complete the following steps to edit a worklist in Order Tracking worklist:

1. Select **Manage Worklists**. The Manage Worklist dialog box is displayed.
2. Select the **ellipsis (...)** button next to the worklist that you want to edit.



3. Select **Edit**. The Edit Worklist dialog box is displayed.



4. Make any changes to the Worklist Name, Location, Providers, and Orders fields.
5. If you select **Save and Apply**, the edited worklist is saved and displayed in the Order Tracking window. If you select **Save**, the changes are saved, and the Manage Worklist dialog box is

displayed. If you select **Cancel**, the changes are not saved, and the Manage Worklist dialog box is displayed.

6. Select **Close** or **X** to close the Manage Worklist dialog box.

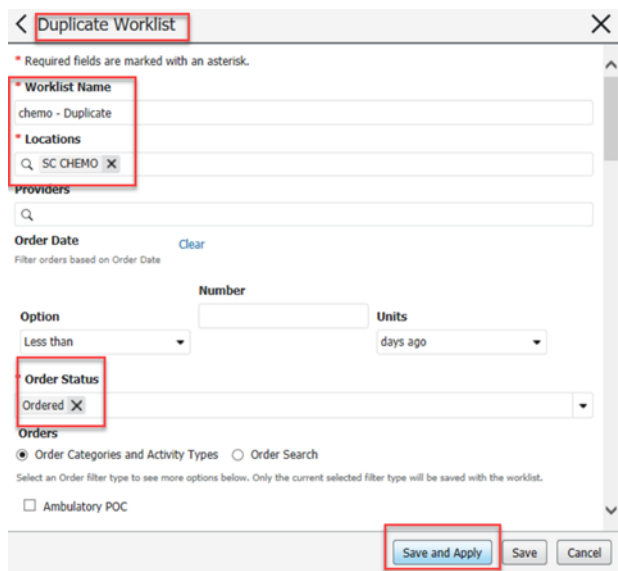
Duplicating a Worklist

Complete the following steps to duplicate a worklist in Order Tracking worklist:

1. Select **Manage Worklists**. The Manage Worklist dialog box is displayed.
2. Select the **ellipsis (...)** button next to the worklist that you want to duplicate.



3. Select **Duplicate**. The Duplicate Worklist dialog box is displayed.



4. Make any changes to the Worklist Name, Location, Providers, and Orders fields.
5. If you select **Save and Apply**, the duplicate worklist is saved and displayed in the Order Tracking window. If you select **Save**, the duplicate worklist is saved, and the Manage Worklist dialog box is displayed. If you select **Cancel**, the duplicate worklist is not saved, and the Manage Worklist dialog box is displayed.
6. Select **Close** or **X** to close the Manage Worklist dialog box.

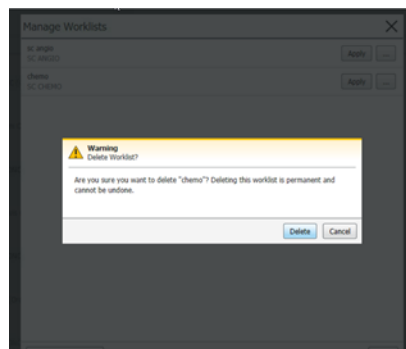
Deleting a Worklist

Complete the following steps to delete a worklist in Order Tracking worklist:

1. Select **Manage Worklists**. The Manage Worklist dialog box is displayed.
2. Select the **ellipsis (...)** button next to the worklist that you want to delete.



3. Select **Delete**. A Warning dialog box is displayed confirming whether you want to delete the worklist.



4. Select **Delete** to remove the worklist. Select **Cancel** to return to the Manage Worklist dialog box without deleting the worklist.
5. Select **Close** or **X** to close the Manage Worklist dialog box.

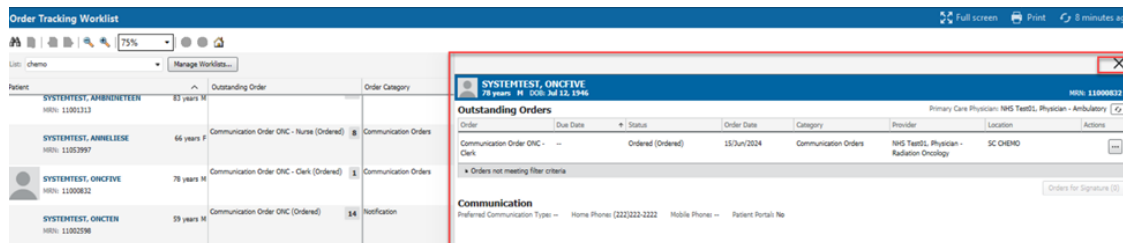
Using the Order Tracking List

From the worklists, order information can be reviewed, orders can be completed, orders can be canceled, or orders can be removed from tracking.

Value Added: Provides visibility to ensure ordered patient interventions don't get overlooked.

Note: Once a user stops tracking an order, that order is removed from all worklists on which was listed. Canceling an order also removes it from all worklists.

To begin: Click anywhere in a patient row and this box opens to the R side



Order Tracking Worklist

75%

List: chemo

Patient	Outstanding Order	Order Category
SYSTEMTEST, AMBINEEEN MRN: 11001313	Communication Order ONC - Nurse (Ordered)	Communication Orders
SYSTEMTEST, ANHELEISE MRN: 11002907	Communication Order ONC - Clerk (Ordered)	Communication Orders
SYSTEMTEST, ONCFIVE MRN: 11000832	Communication Order ONC - Clerk (Ordered)	Communication Orders
SYSTEMTEST, ONCTEN MRN: 11002298	Communication Order ONC (Ordered)	Notification

SYSTEMTEST, ONCFIVE
78 years M DOB: Jul 13, 1946 MRN: 11000832

Outstanding Orders

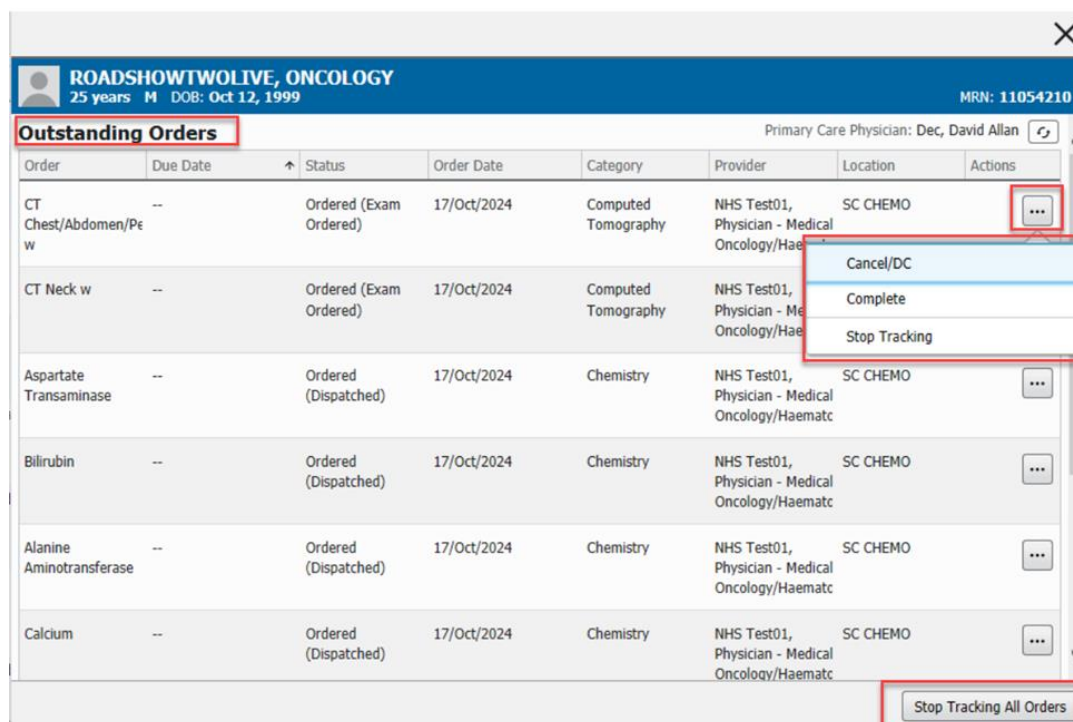
Order	Due Date	Status	Order Date	Category	Provider	Location	Actions
Communication Order ONC - Clerk	--	Ordered (Ordered)	15/Jun/2024	Communication Orders	NHS Test01, Physician - Radiation Oncology	SC CHEMO	

Orders not meeting filter criteria

Communication

Preferred Communication Types -- Home Phone: (222)222-2222 Mobile Phone -- Patient Portal No

Orders for Signature (0)



ROADSHOWTWOLIVE, ONCOLOGY
25 years M DOB: Oct 12, 1999 MRN: 11054210

Primary Care Physician: Dec, David Allan

Outstanding Orders

Order	Due Date	Status	Order Date	Category	Provider	Location	Actions
CT Chest/Abdomen/Pelvis	--	Ordered (Exam Ordered)	17/Oct/2024	Computed Tomography	NHS Test01, Physician - Medical Oncology/Haematc	SC CHEMO	...
CT Neck w	--	Ordered (Exam Ordered)	17/Oct/2024	Computed Tomography	NHS Test01, Physician - Medical Oncology/Haematc	SC CHEMO	...
Aspartate Transaminase	--	Ordered (Dispatched)	17/Oct/2024	Chemistry	NHS Test01, Physician - Medical Oncology/Haematc	SC CHEMO	...
Bilirubin	--	Ordered (Dispatched)	17/Oct/2024	Chemistry	NHS Test01, Physician - Medical Oncology/Haematc	SC CHEMO	...
Alanine Aminotransferase	--	Ordered (Dispatched)	17/Oct/2024	Chemistry	NHS Test01, Physician - Medical Oncology/Haematc	SC CHEMO	...
Calcium	--	Ordered (Dispatched)	17/Oct/2024	Chemistry	NHS Test01, Physician - Medical Oncology/Haematc	SC CHEMO	...

Stop Tracking All Orders

Stopping Tracking for All Orders for a Patient

Complete the following steps to stop tracking all orders for a patient:

1. Select an order from the worklist. A detail pane for the patient is displayed.
2. Select **Stop Tracking All Orders**. A warning message is displayed asking whether you are sure you want to stop tracking all of the patient's orders.
3. Select **Stop Tracking** to stop tracking the orders and remove them from the worklist. If you select **Cancel**, the warning is closed and the orders are not removed.
4. Select the **close (X)** button to close the detail pane.

Stopping Tracking for an Individual Order

Complete the following steps to stop tracking an individual order:

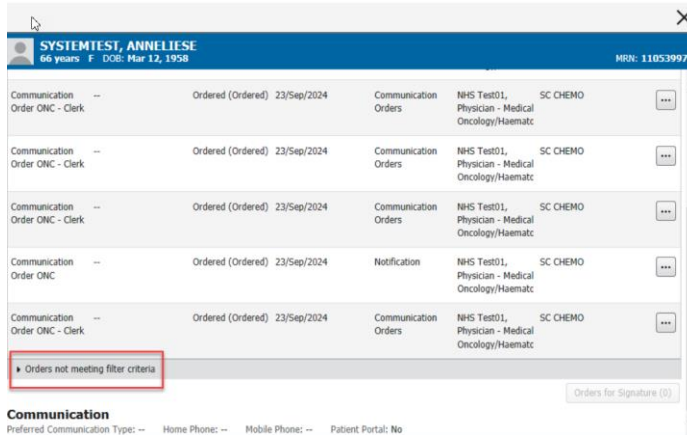
1. Select an order from the worklist. A detail pane for the patient is displayed.
2. Select the **ellipsis (...)** button next to the order that you want to stop tracking.
3. Select **Stop Tracking**. A warning message is displayed asking whether you are sure you want to stop tracking the order.
4. Select **Stop Tracking** to stop tracking the order and remove it from the worklist. If you select **Cancel**, the warning is closed and the order is not removed.
5. Select the **close (X)** button to close the detail pane.

Canceling an Order

Complete the following steps to cancel an individual order:

1. Select an order from the worklist. A detail pane for the patient is displayed.
2. Select the **ellipsis (...)** button next to the order that you want to stop tracking.
3. Select **Cancel/DC**. The order is added to the Orders for Signature button below the Outstanding Orders table.
4. Select **Orders for Signature**. The Modal Order Entry window is displayed.
5. Select **Sign**. The order is canceled, the window closes, and the user is returned to the detail pane. Canceled orders are displayed until the worklist reloads, at which point they are removed.
6. Select the **close (X)** button to close the detail pane.

Note: Orders that do not meet your selected status will be hidden on your list, but can be viewed and actioned.



SYSTEMTEST, ANNELIESE
66 years F DOB: Mar 12, 1958 MRN: 11053997

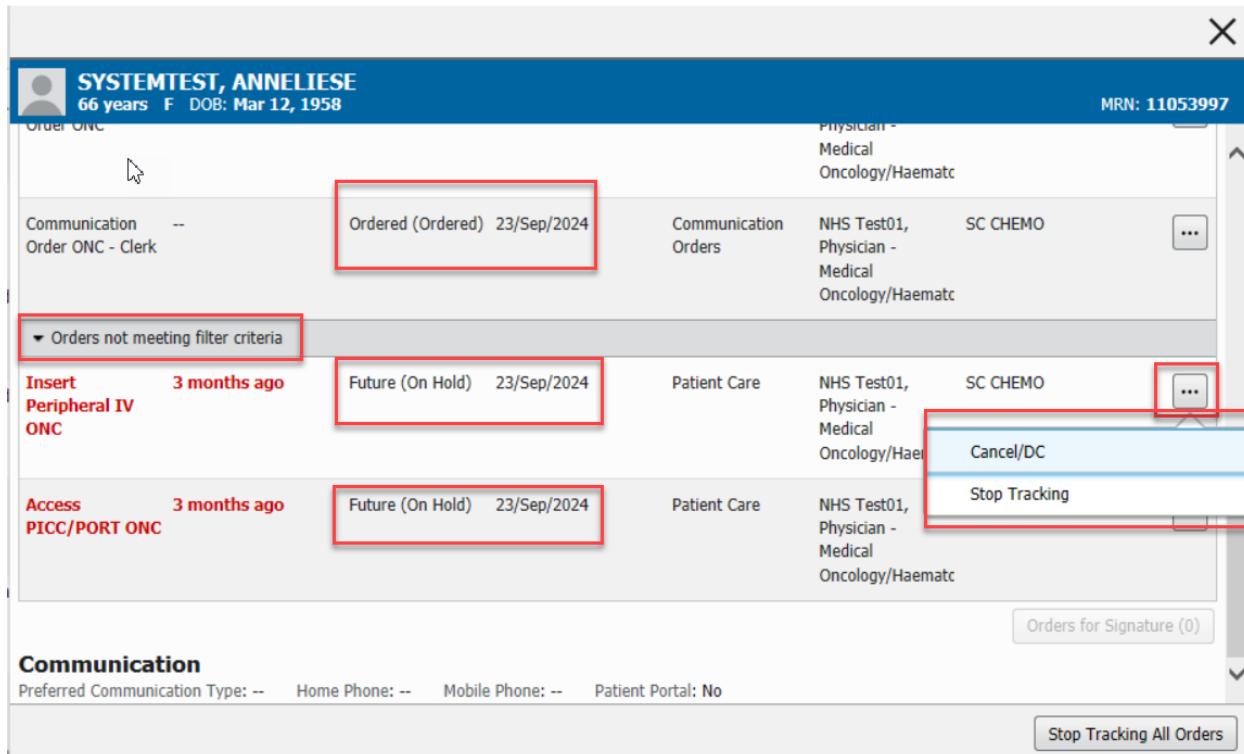
Communication Order ONC - Clerk	Ordered (Ordered) 23/Sep/2024	Communication Orders	NHS Test01, Physician - Medical Oncology/Haematc	SC CHEMO	...
Communication Order ONC - Clerk	Ordered (Ordered) 23/Sep/2024	Communication Orders	NHS Test01, Physician - Medical Oncology/Haematc	SC CHEMO	...
Communication Order ONC - Clerk	Ordered (Ordered) 23/Sep/2024	Communication Orders	NHS Test01, Physician - Medical Oncology/Haematc	SC CHEMO	...
Communication Order ONC	Ordered (Ordered) 23/Sep/2024	Notification	NHS Test01, Physician - Medical Oncology/Haematc	SC CHEMO	...
Communication Order ONC - Clerk	Ordered (Ordered) 23/Sep/2024	Communication Orders	NHS Test01, Physician - Medical Oncology/Haematc	SC CHEMO	...

Orders not meeting filter criteria

Orders for Signature (0)

Communication
Preferred Communication Type: -- Home Phone: -- Mobile Phone: -- Patient Portal: No

Click on the arrow beside the grey shaded bar as shown above



SYSTEMTEST, ANNELIESE
66 years F DOB: Mar 12, 1958 MRN: 11053997

Communication Order ONC - Clerk	Ordered (Ordered) 23/Sep/2024	Communication Orders	NHS Test01, Physician - Medical Oncology/Haematc	SC CHEMO	...
Orders not meeting filter criteria					
Insert Peripheral IV ONC	3 months ago	Future (On Hold) 23/Sep/2024	Patient Care	NHS Test01, Physician - Medical Oncology/Haematc	SC CHEMO
Access PICC/PORT ONC	3 months ago	Future (On Hold) 23/Sep/2024	Patient Care	NHS Test01, Physician - Medical Oncology/Haematc	...

Cancel/DC
Stop Tracking

Orders for Signature (0)

Communication
Preferred Communication Type: -- Home Phone: -- Mobile Phone: -- Patient Portal: No

Stop Tracking All Orders