



Research – Orders Only Encounters and Pre-Charting



Introduction

In research settings, it is common for study teams to need to review patient information and place orders outside of patient encounters. There are a couple of ways that you will do this in Connect Care.

Pre-Charting

Scenario: Patient has an upcoming visit scheduled, and you open that visit from the schedule or their chart.

If you open a patient visit on a future date, or a visit for today that has not yet checked, then the patient's encounter opens in a pre-charting workspace, not the typical visit navigator. Pre-charting looks very similar to what you typically see in a patient visit, only with a pre-charting notification above your navigator sections.

Pre-charting is useful to allow you to review patient information prior to the patient arriving. This should promote communication with other clinicians based on the information reviewed prior to the visit. It will also help you spend more face-to-face time with your patient, and less time reviewing the chart. The system will not allow users to sign orders in pre-charting. Research staff can enter and pend orders for the physician or PI to sign, but those providers will not be able to sign the orders until the patient actually arrives.

You should think of pre-charting as a way to queue up today's work or tomorrow's work, so that you can complete documentation more quickly when you are with the patient.

Important: DO NOT click 'start the visit' until the patient checks-in.

Orders Only Encounters

Scenario: You want to enter orders or documentation on a patient outside of an in-person visit. Or you want to have your PI sign orders to be carried out in the future.

Orders only encounters allow you to interact with the patient's chart outside of a hospital or clinic setting to enter orders or complete documentation. Research staff can create these encounters.

To create an Orders Only encounter, go to the Epic button, hover over Patient Care, and select Orders Only. You will be prompted to search for your patient. You will then need to enter the provider (which should be you), and the department (which should be where you typically see your research patients). Click Accept and you will enter a new Orders Only encounter.

From here, you will have a Visit Navigator with a few tools for your research responsibilities – such as updating a patient's study status, writing a Research Note, or completing Research Tasks. You can also enter orders from the task bar at the bottom of the screen, just as you would in an in-person visit. If you



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enter orders on the encounter, use the Send Chart section to route the chart to your PI so that she can sign the orders.

You should think of Orders Only Encounters as a way to do your work outside of the times when you're interacting with patients, or as a way to enter and activate orders so that they're available the next time you see your patient.

A note on Research documentation: You can do much of your study-specific work without accessing an encounter. To update patient enrollments, scan consents, document Adverse Events, or complete Tasks, you can just open the patient's chart from Pt Research Studies on your toolbar and complete those activities.

Important: Please note that pended Orders only encounters can be signed by the authorizing provided immediately and these orders will routed to service areas (pharmacy/lab/DI) immediately. Due to the queueing of these processing requests Orders Only Encounters should be placed as close as possible to the actual visit and should not be used to replace standing orders.

