

# Touchworks Training

## Clinical Staff Order Entry



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# Clinical Staff Order Entry

## Orders Guidelines:

*Providers are ultimately responsible for accurate orders being entered.*



- Physicians may send an electronic task to the clinical staff to enter a current or future order with the associated specific diagnosis code.
- A credentialed MA, LVN, or RN may enter a diagnosis code into the problem list provided the physician has given the specific diagnosis code.
- In circumstances when an electronic order is not possible, a route sheet may be used to task clinical staff to perform order entry. Each order on the route sheet must have a diagnosis code identified. Verbal orders may be given to licensed nurses (RN/LVN), **the test being ordered rationale for the order and medical necessity must be documented in the medical record.** An “Authorized Order” task is sent back to the ordering physician as a form of verification and approval.
- Orders **must be in Touchworks** before the patient presents to the laboratory or radiology. If Touchworks is down, follow downtime procedures.

## Additional Order Guidelines:

- **ICD-10 - Z00.00 - Medicare does not pay for services with Z00.00.** For patients that are NOT Medicare this diagnosis should only be used if testing is related to a routine physical, it should not be attached to testing ordered for the purpose of an illness or health condition.
- **Radiology Nurses** – Per the guidelines in SRS Radiology, RNs may enter orders for pathology exams, a problem in the problem list should be selected that is specifically related to the procedure that was performed.
- **Conditional Tasking:** Conditional tasks involve ordering lab/rad as a function of the task.
  - For example: Mrs. Smith has a K of 5.5 on a lab result and the following task is sent by the physician to the nurse.” K is 5.5. If patient is still taking K supplement have them stop and recheck K in 7-10 days and link to the diagnosis provided by the physician. If not taking K supplement, please indicate”

- **Credentialed Medical Assistants** can enter pre-op, pre-procedure orders and orders and enter/link a diagnosis per the table:

Orders	Dx Code
Pap Smear Order	Z12.4 Cervical Pap Smear
Skin Biopsy Order	D48.5 Skin Neoplasm of Uncertain Behavior
Gonorrhea	Z11.3 Screening Exam Bact /Spirochetal Venereal Disease
HPV	Z11.51 Visit For: Screening Exam For Human Papillomavirus (HPV)  Z01.419 Encounter for gynecological examination without abnormal findings  Z01.411 Encounter for gynecological examination with abnormal findings
Hepatitis C	Z11.59 Encounter for screening for other viral diseases
Chlamydia	Z11.3 Visit For: Screening Exam Chlamydial Infections
Routine OB tests *For OBGYN staff only*	Z34.80 Supervision of Normal Pregnancy
Semen Analysis *For Urology staff only*	Z98.52 Post vasectomy semen analysis
Breast Cancer Screening	Z12.31 Encounter for screening mammogram for malignant neoplasm of breast
Breast Cancer Screening High Risk	Z12.31 & Z80.3 Family Hx of malignant neoplasm of breast
Cervical Cancer Screening	Z12.4 Encounter for screening for malignant neoplasm of cervix
Osteoporosis Screening	Z13.820 Encounter for screening for osteoporosis
Prostate Cancer Screening	Z12.5 Encounter for screening for malignant neoplasm of prostate
Immunochemical Fecal Occult Blood Screening	Z12.11 Encounter for screening for malignant neoplasm of colon

Updated 10/18

\*Valid through October 2019\*

## Entering Labs

- Highlight the **Problem**

**SRSTEST, PAPER** EnMRN: 4816081 SHC: 107-877-761 Other: SHARP, R  
Sex: F H Phone: (123)456-7890 PCP:  
DOB: 04-Apr-1994 Age: 24 Years Pri Ins:

Clinical Staff View.

Meds Med Flowsheet Immunizations Orders

Current Medications Status Alpha Rec: Needed

Record Registry Consult Select non-consult reason Type your own non-consult reason History

There are no items to show in this view.

New Med Hx Edit Renew with changes Drug Ed Order D/C Reprint Rx/Resend Rx Continue

Allergies Problem Encounter

All Problem List Rec: Needed

Name	ICD-10	Managed By	Last Assessed
<b>Active</b>			
Ankle pain	M25.579		18Jan2019 SPEES, DAVID N...
Asthma	J45.909		18Jan2019 SPEES, DAVID N...
<b>Upper respiratory infection</b>	J06.9		18Jan2019 SPEES, DAVID N...
Health Maintenance			18Jan2019 SPEES, DAVID N...

- Click the  (Add New Order) icon

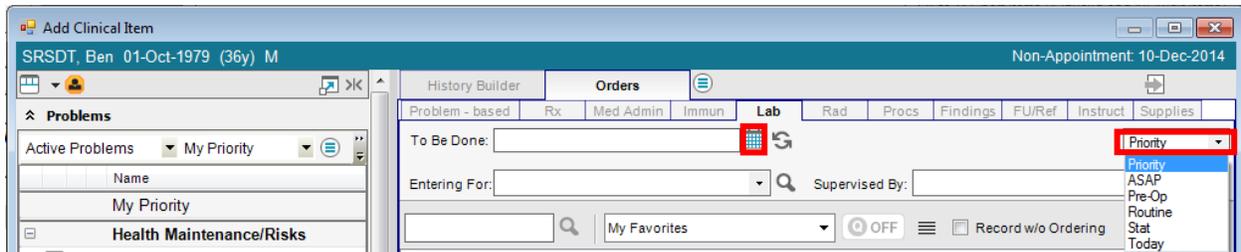
**SRSRT, BEN** EnMRN: 421538  
Sex: M  
DOB: 01-Oct-

Select Patient

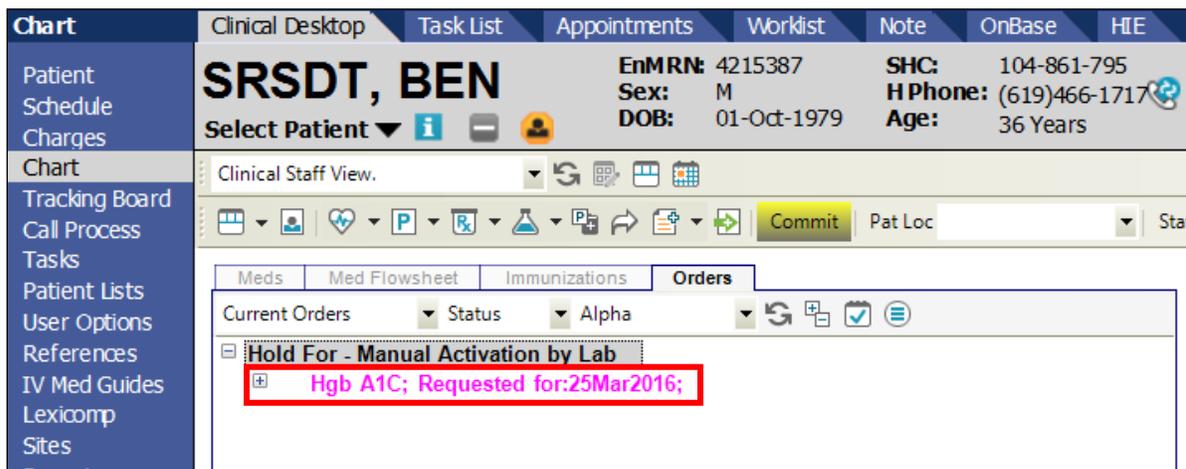
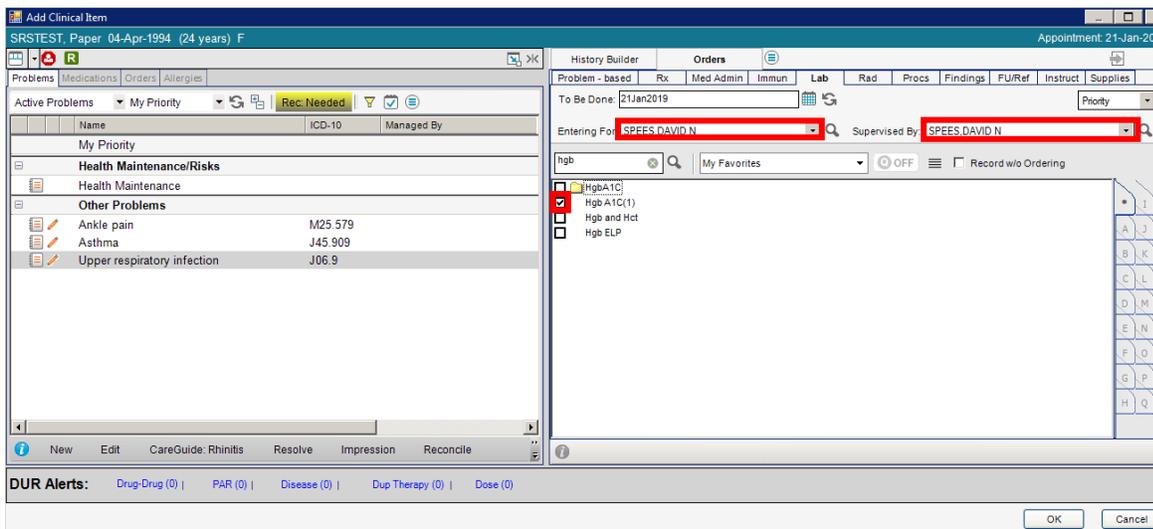
Clinical Staff View.

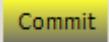


- Select **To Be Done** date. All orders are “Routine” unless otherwise stated
- Use the calendar icon to select a date



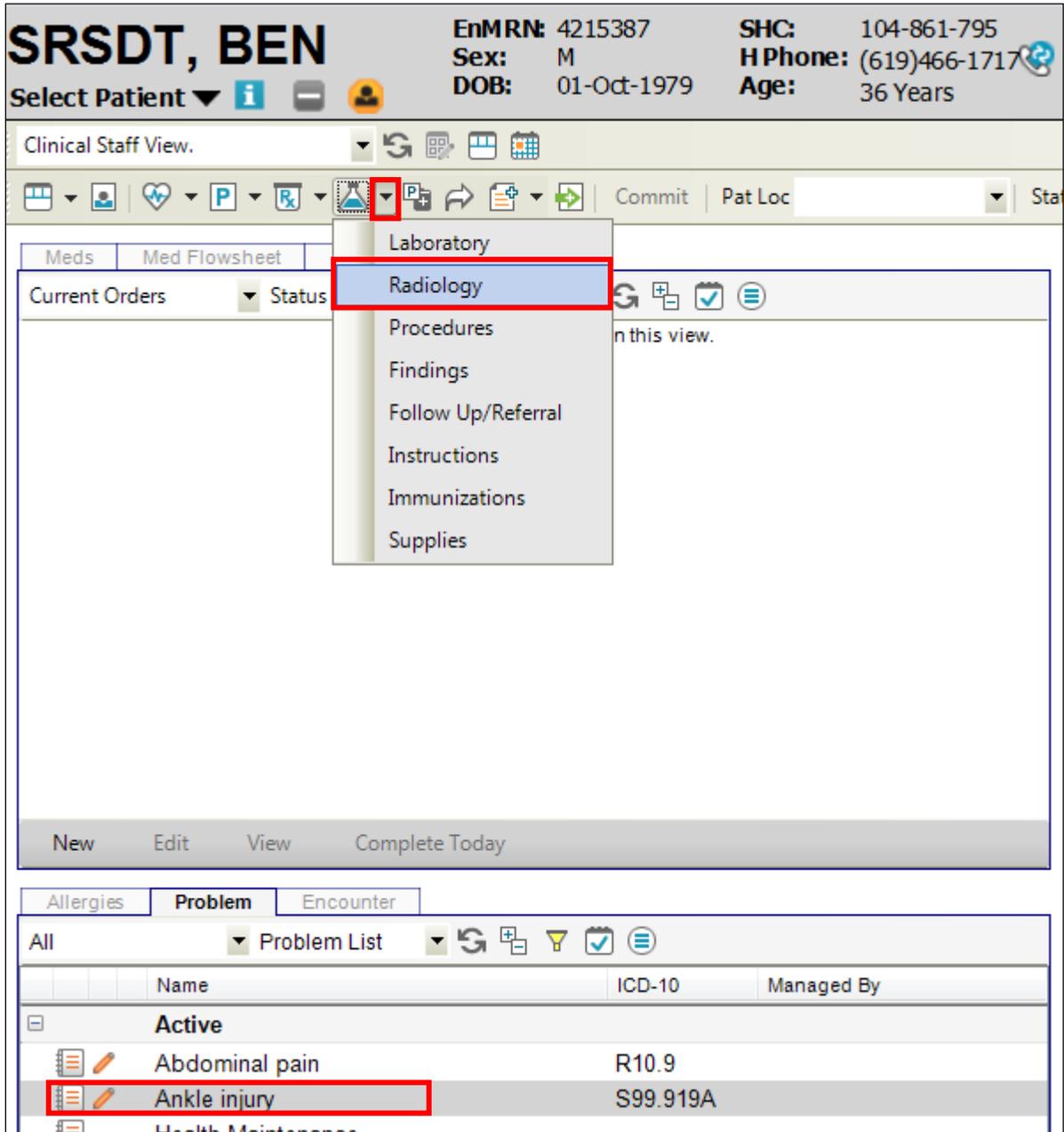
- Select the “**Entering for**” and “**Supervised by**” fields. Use the magnifying glass icon  to search for a provider
- Type the lab test **Order** in the search box and click the magnifying glass icon 
- Check the box for the correct lab test and click OK



- Click  (Your order will appear under the Orders tab)

## Entering Imaging

- Highlight the **Problem**
- Click the arrow beside the  (Add New Order) icon
- Click Radiology



**SRS DT, BEN**      EnMRN: 4215387      SHC: 104-861-795  
Sex: M      H Phone: (619)466-1717  
DOB: 01-Oct-1979      Age: 36 Years

Clinical Staff View.

Commit | Pat Loc

Laboratory  
Radiology  
Procedures  
Findings  
Follow Up/Referral  
Instructions  
Immunizations  
Supplies

New   Edit   View   Complete Today

Allergies   **Problem**   Encounter

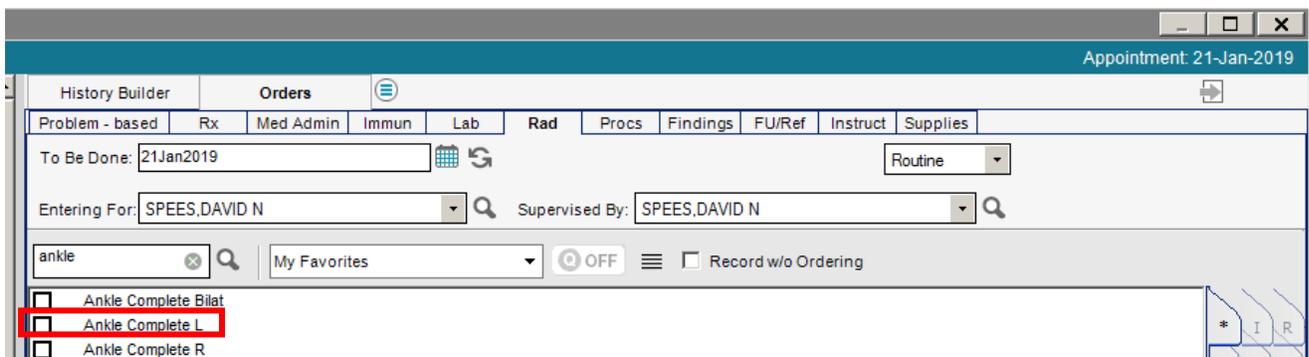
All   Problem List

	Name	ICD-10	Managed By
<b>Active</b>			
	Abdominal pain	R10.9	
	Ankle injury	S99.919A	
	Health Maintenance		

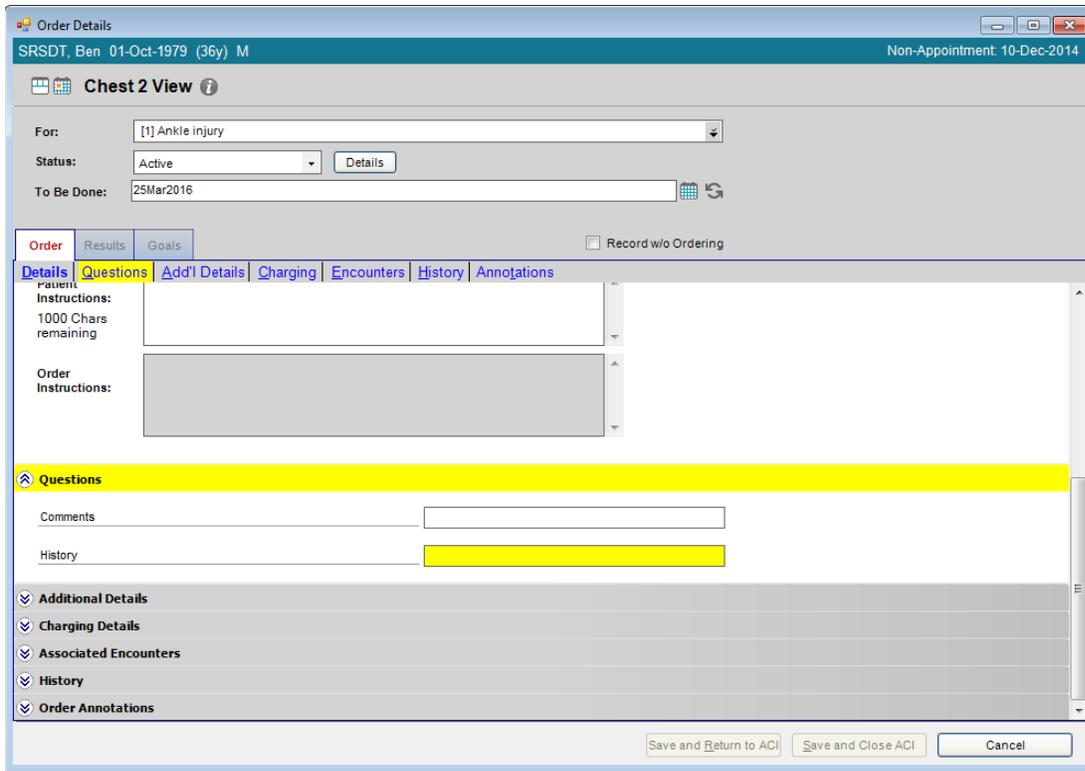
- Select **To Be Done** date
- Select the **Entering For** and **Supervised By**



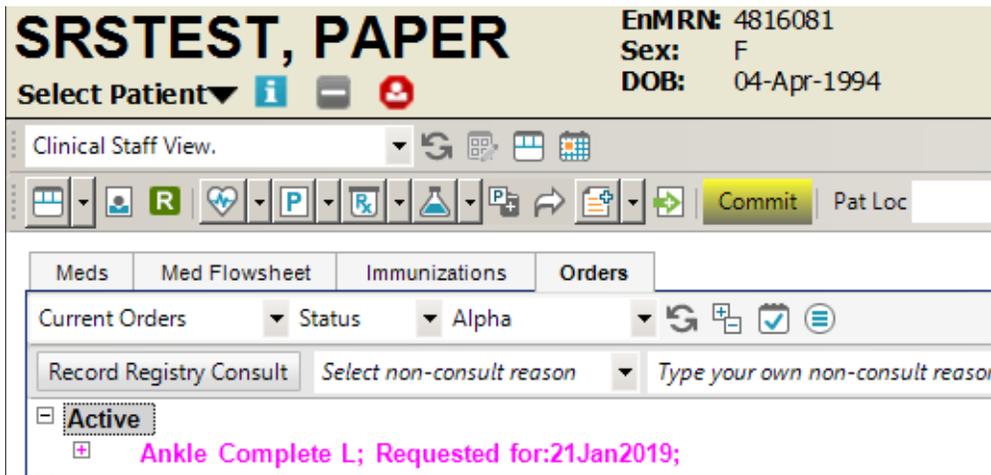
- Type the radiology test **Order** in the search box and click the magnifying glass icon
- Check the box of the correct test.



- Complete the Clinical Questions



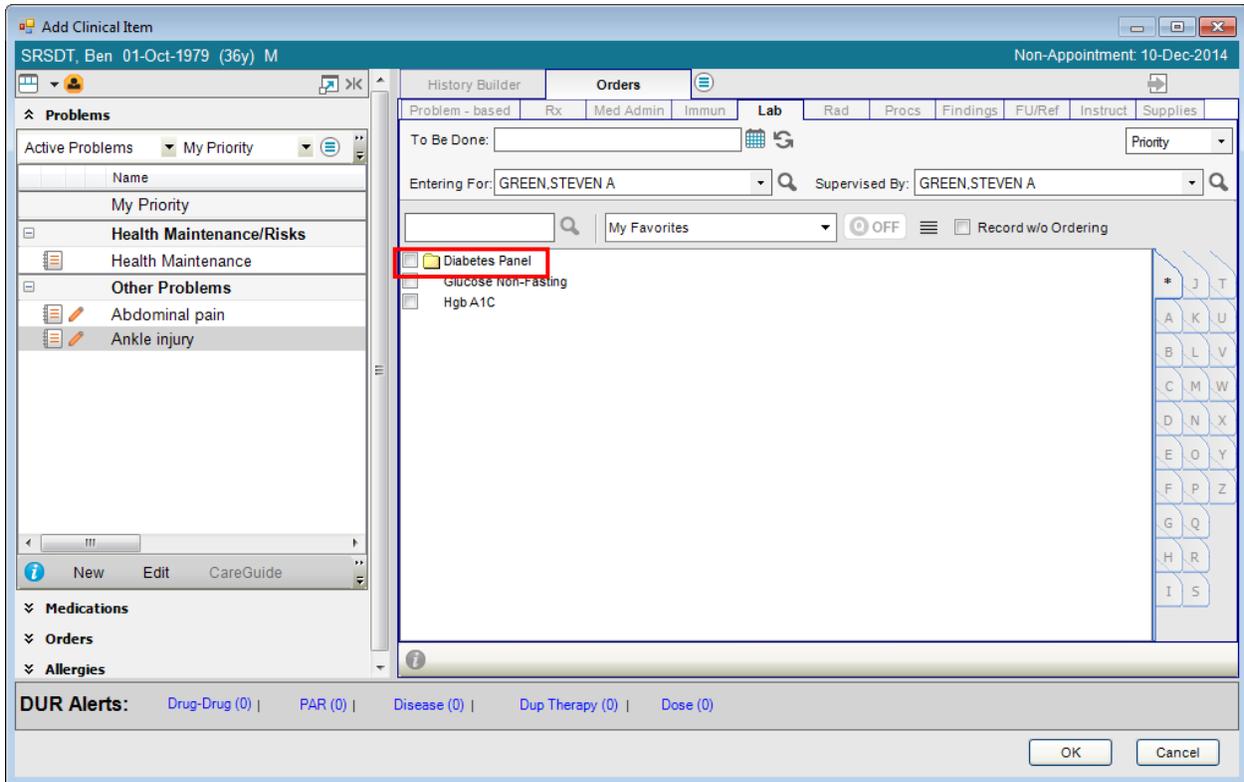
- Click 
- Click 



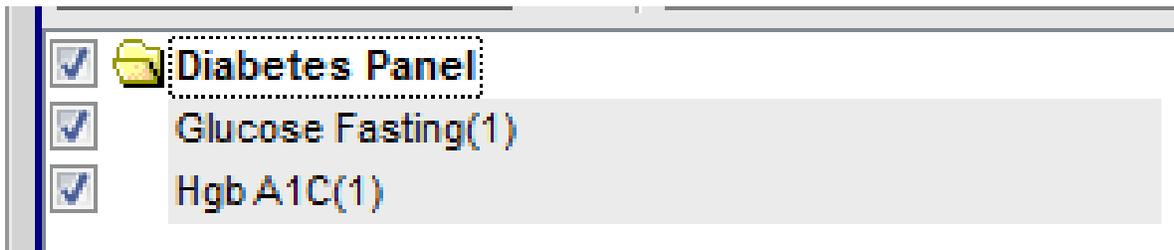
# Order Groups

Commonly ordered tests and education can be grouped together for easy ordering.

- Order groups appear as folders  and default in your favorites



- To view the contents of an order group click on the folder
- After clicking the folder it will appear as open  and its contents will display directly beneath it.

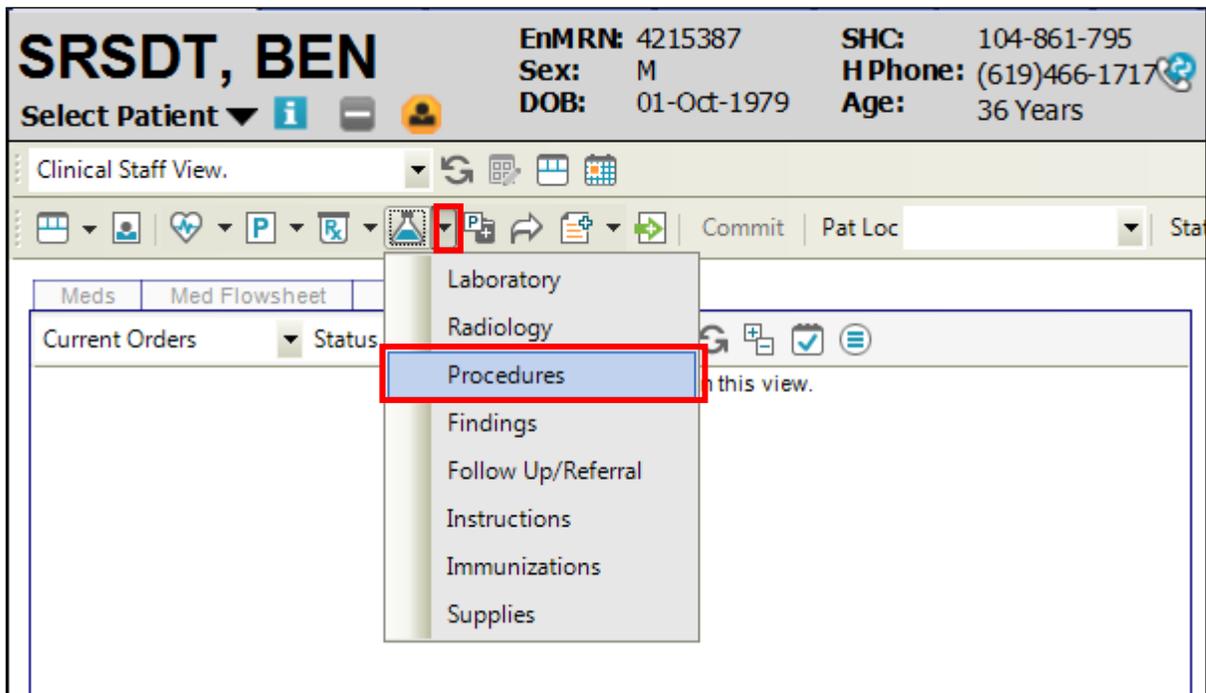


## Entering Point of Care (POC)

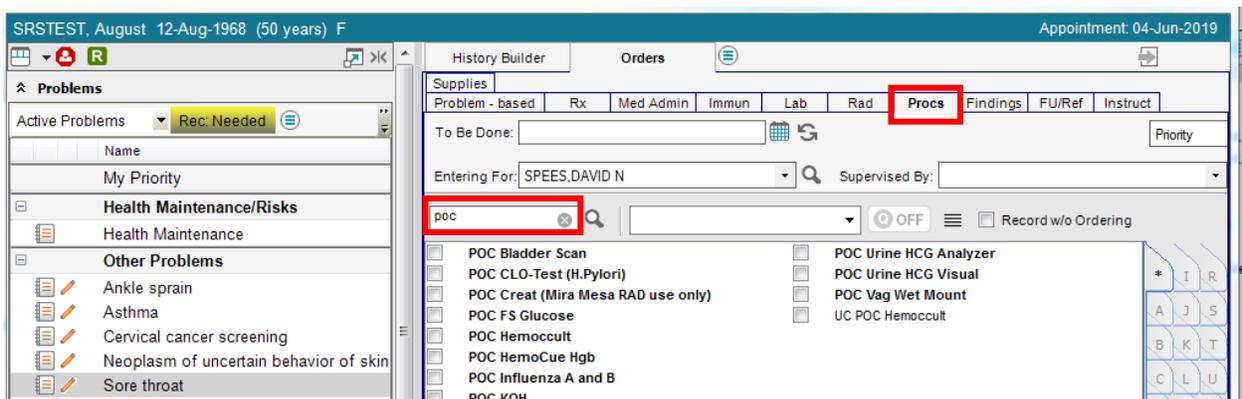
In house testing or procedures that are performed routinely in the clinic.

Examples: Rapid Strep, Hemacult, Fasting Glucose, Urinalysis, Pregnancy Test

- Click the arrow beside the  (Add New Order) icon
- Click Procedures



- Type **POC** in the search box and click the magnifying glass icon 



- **Double click** on the test being resulted (i.e. POC Rapid Strep)

- Click the **Results** tab

- Click **Now** and select **Value** of the POC order

Results Details

Resulted: 04Jun2019 09:26AM Collected/Examined: 04Jun2019 09:26AM **Now**  Verification Required

Ordered By: SPEES, DAVID N Route To:

Performing Location: In Office Performed By: SPEES, DAVID N Accession #:

Comments From Performing Location:

Result Annotations

Results Item(s)					
Component	Value	Units	Flag	Ref Range	Stage
POC Rapid Strep	Neg	Not In Use			Final

Goal: [New](#)

Save and Return to ACI Save and Close ACI Cancel

- Click **Save and Close ACI**

The POC test will have a **Resulted – Requires Verification** status in the patient’s chart. The provider will receive a **Verify Patient Result Task** to finalize the results.

**SRSDT, MARGE**    EnMRN: 4600653    SHC: 107  
 Sex: F    H Phone: (85  
 DOB: 04/20/1960    Age: 55

Select Patient ▼  

Clinical Staff View.   

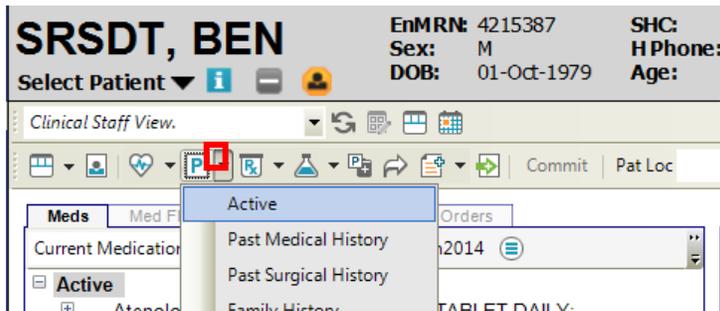
                                                                                                                                                                                                                                                                                                                                                                                                                                   

## Entering Problem for Pap Smear Orders

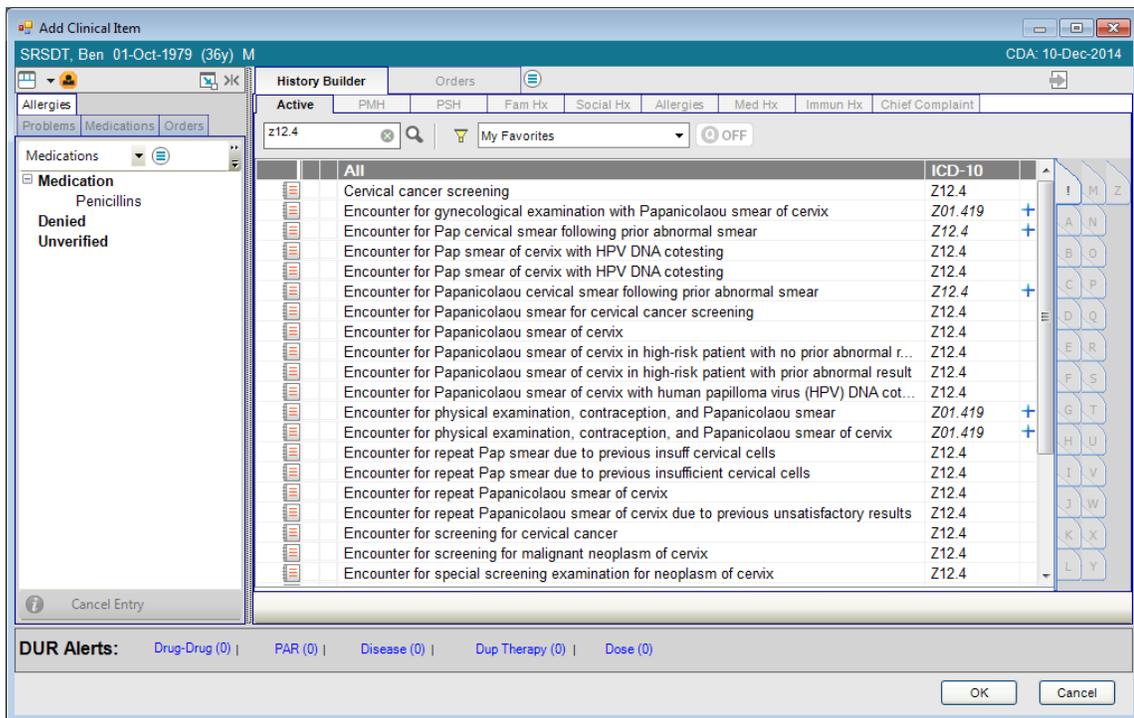
The following problem may be entered if not already done so by the provider:

**Z12.4 Cervical Pap Smear**

- Click the  (Add New Problem) arrow icon on the clinical toolbar
- Click Active



- Type **Z12.4** in the Search box and click on the magnifying glass icon 



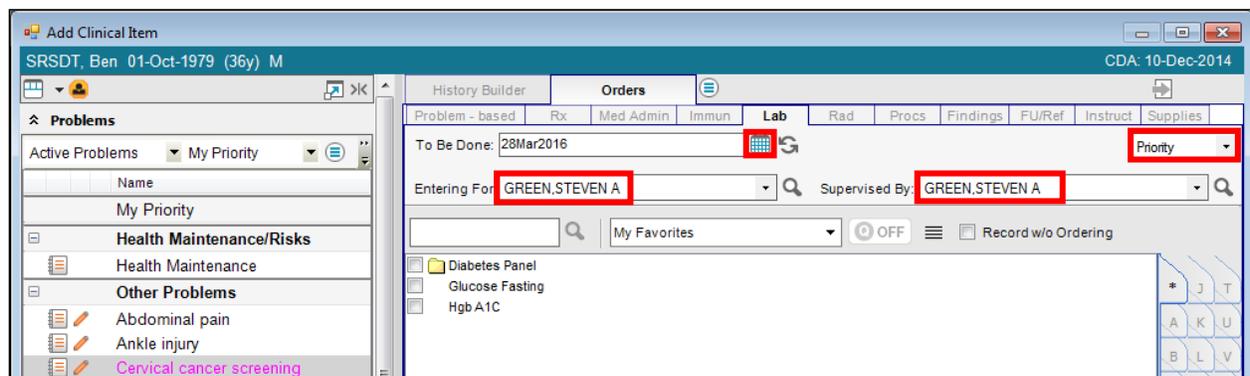
- Select **Cervical Cancer Screening**
- Click **OK**

## Order the Pap Smear Exam

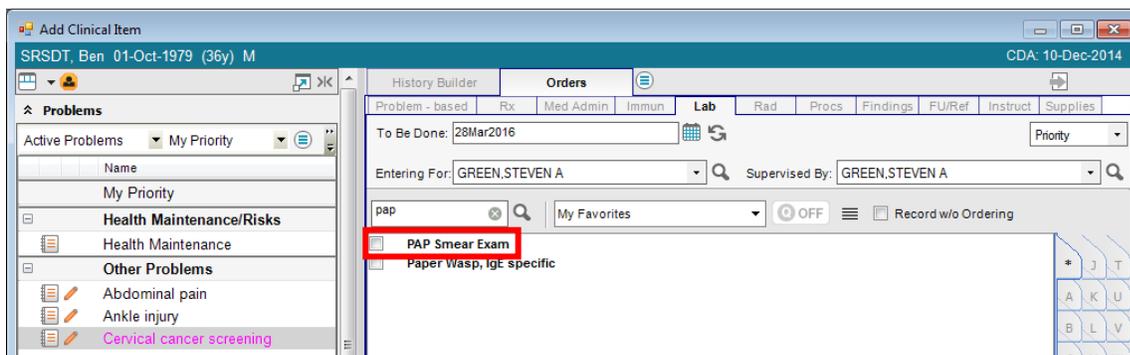
- Highlight the **Problem**
- Click the  (Add New Order) icon

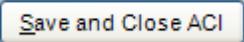


- Select the **To Be Done** date and **Priority**
- Select the “**Entering for**” and “**Supervised by**” fields. Use the magnifying glass icon  to search for a provider



- Type **PAP** in the search box and click on the magnifying glass icon 
- **Double Click** on Pap Smear Exam



- Scroll Down to view and answer the Clinical Questions.
- Click 

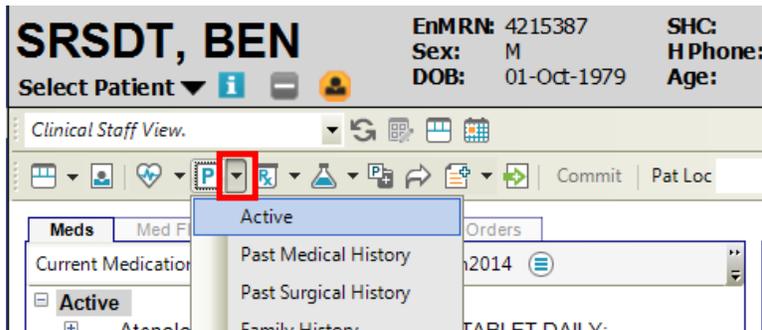


## Entering Problem for Pathology Exams

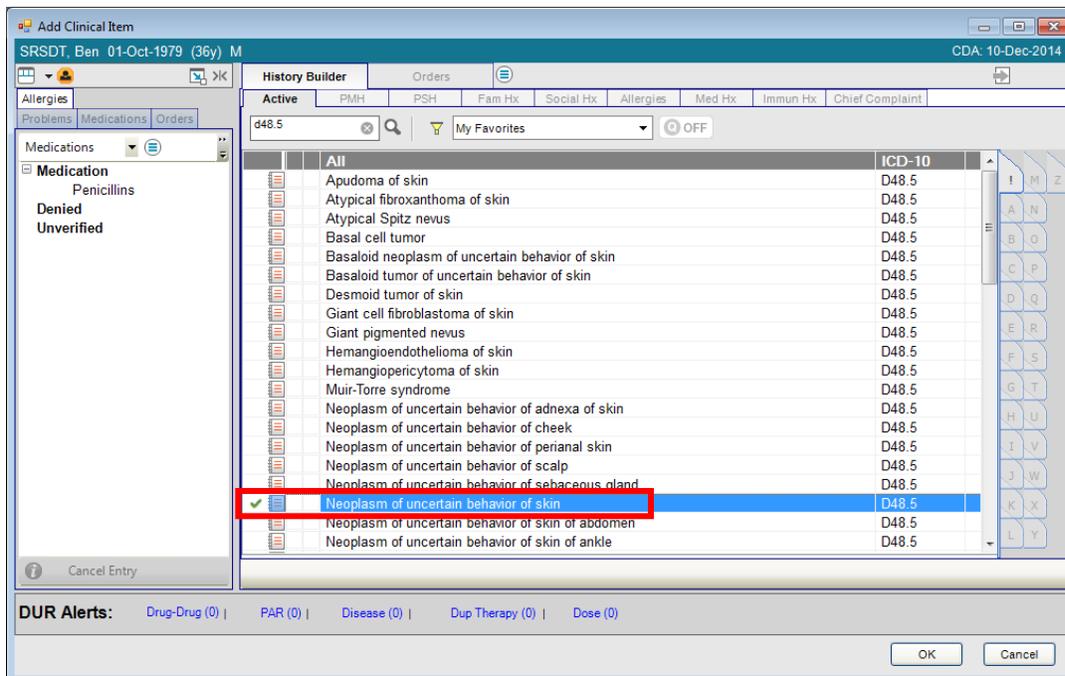
The following problem may be entered if not already done so by the provider:

**D48.5 Neoplasm of uncertain behavior of skin**

- Click the  (Add New Problem) arrow icon on the clinical toolbar



- Type **D48.5** in the Search box and click on the magnifying glass icon 
- Select **Neoplasm of uncertain behavior of skin**



- Click **OK**

## Ordering the Pathology Exam

- Highlight the **Problem**

**SRSDT, BEN**      EnMRN: 4215387      SHC: 104-861-795  
 Sex: M      H Phone: (619)466-1717  
 Select Patient      DOB: 01-Oct-1979      Age: 36 Years

Clinical Staff View.

Commit      Pat Loc

HMP

Meds      Med Flowsheet      Immunizations      Orders      Allergies      **Problem**      Encounter

All      Problem List

Name	ICD-10	M
<b>Active</b>		
Abdominal pain	R10.9	
Ankle injury	S99.919A	
<b>Neoplasm of uncertain behavior of skin</b>	<b>D48.5</b>	
Health Maintenance		

- Click the  (Add New Order) icon

**SRSDT, BEN**      EnMRN: 4215387  
 Sex: M      DOB: 01-Oct-

Clinical Staff View.



- Select the **To Be Done** date and **Priority**
- Select the **“Entering for”** and **“Supervised by”** fields. Use the magnifying glass icon  to search for a provider

Add Clinical Item

SRSDT, Ben 01-Oct-1979 (36y) M      CDA: 10-Dec-2014

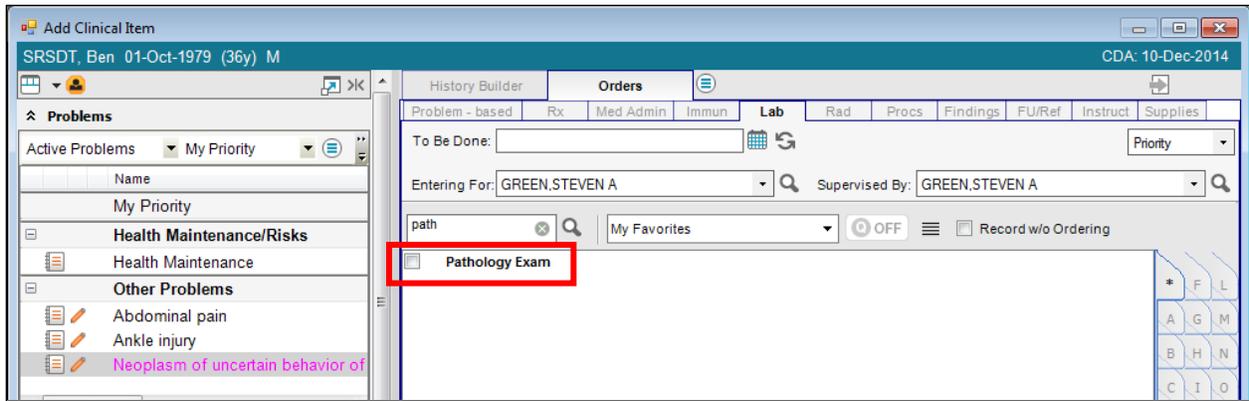
History Builder      Orders      Lab      Rad      Procs      Findings      FU/Ref      Instruct      Supplies

To Be Done: 28Mar2016                  **Priority** ▼

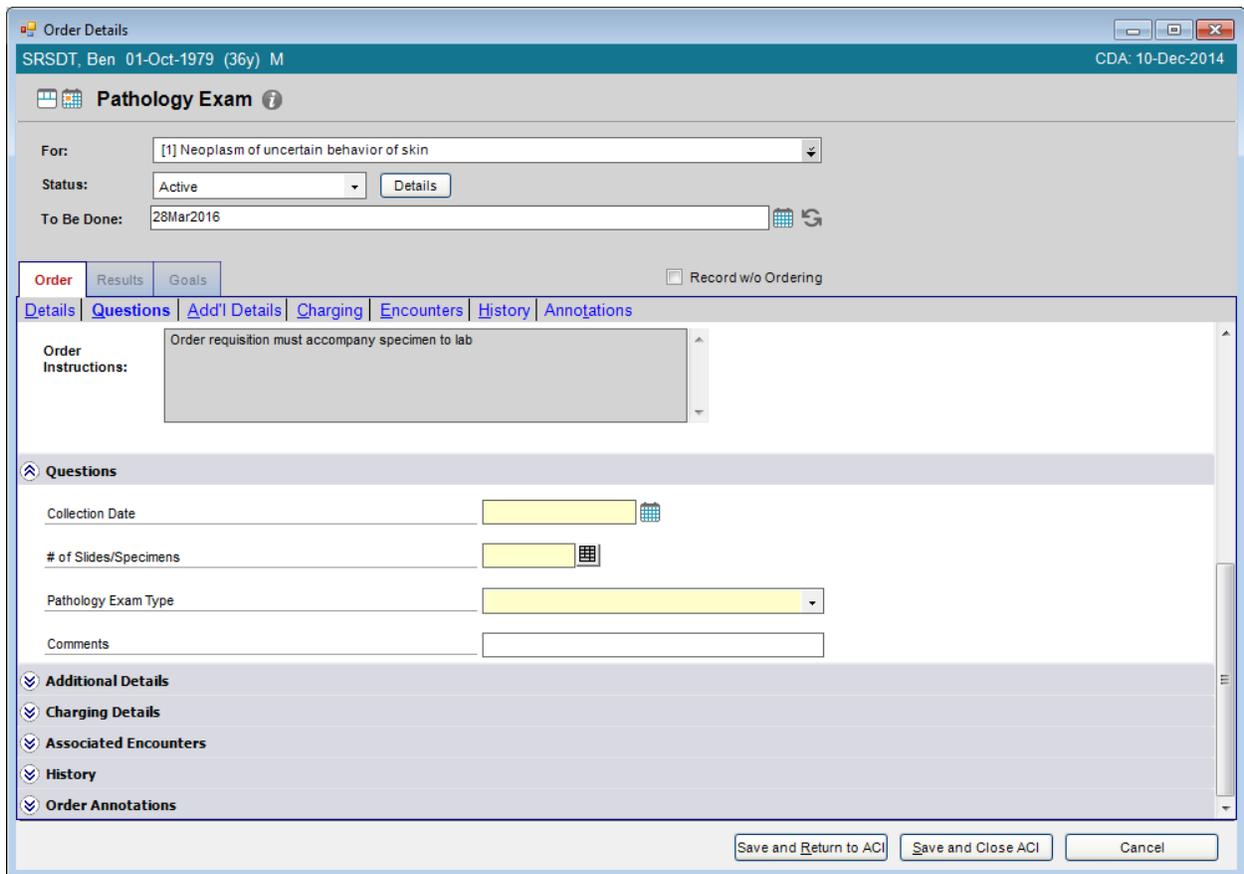
Entering For: **GREEN, STEVEN A**            Supervised By: **GREEN, STEVEN A**      

Diabetes Panel  
 Glucose Fasting  
 Hgb A1C

- Type **Pathology** in the search box and click on the magnifying glass icon 
- Double Click** on **Pathology Exam**



- Scroll down and complete all required Clinical Questions
- Click



- Click

## Activating an EKG Order

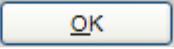
- Select the site you are working.

**Site**

**Name:** Sharp Rees Stealy - San Diego Main  
**Address:** 2929 Health Center Drive  
**City:** San Diego  
**State, ZIP:** CA, 92123  
**Phone:**  
**Site ID:** 00000000000000000028  
**Account ID:** 00000000000008168601

Select Site...

Click the **Select Site** button

- Select the correct site and click 

Site Selector -- Web Page Dialog

**Site Selector**

Site Name	Site ID
Sharp Rees Stealy - Frost Street	0000000000000000000017
Sharp Rees Stealy - Frost Street East	0000000000000000000037
Sharp Rees Stealy - Genesee	0000000000000000000038
Sharp Rees Stealy - Grossmont Medical Plaza	0000000000000000000018
Sharp Rees Stealy - Grossmont Medical Plaza	0000000000000000000036

Select the correct site

OK Cancel

- You must select the ARRIVED patient from the schedule in order for the visit number to transfer over.

**Daily Schedule** [Arrived, Pending and Rescheduled](#) AM: 10 PM: 0 All: 10

Provider: GRANT,JOHN J [All](#) Last Updated: 11/05/2013

Date: 29 Oct 2013

	Sun	Mon	Tue	Wed	Thu	Fri	Sat			
\$	N	A	Pt Loc	Pt Status	Time	Patient	MRN	Type	Dur	Appt No.
		Pen			07:50 AM	SRSDT,LISA	4600655	REG	20	202195131
		Arr			08:10 AM	SRSDT,MARGE	4600653	REG	20	202195128
		Arr			08:30 AM	SRSDT,LISA	4600655	REG	20	202195107
		Pen			09:10 AM	SRSDT,MARGE	4600653	REG	20	202195104
		Arr			09:50 AM	SRSDT,LISA	4600655	REG	20	202194884
		Pen			10:10 AM	SRSDT,HOMER	4600654	REG	20	202195095
		Arr			10:30 AM	SRSDT,MARGE	4600653	REG	20	202195099
		Pen			10:50 AM	SRSDT,HOMER	4600654	REG	20	202194982
		RSC			11:30 AM	INACTIVATED,PHI Z	804638	REG	20	202097703
		Arr			11:30 AM	SRSDT,LISA	4600655	REG	20	202195110

\*All EKG orders entered by the provider can be found under the Orders tab\*

**IMPORTANT!**  
The EKG cart must be connected to the transmitting port in order to receive your order.

**SRSDT,LISA** EnMRN: 4600655 SHC: 107  
Sex: F H Phone: (858)  
DOB: 02/18/2000 Age: 13

Select Patient [i](#) [A](#)

Clinical Staff View.

Meds Med Flowsheet Immunizations **Orders**

Current Orders Status Alpha

**Hold For - Manual Activation**  
ECG Requested for: 05Nov2013

- Click on the ECG order

+ + Bilirubin Total Status: Resulted - Requires Verification Done: 05Sep2007 03:05  
+ + BUN Status: Resulted - Requires Verification Done: 29May2007 08:39AM  
+ + \* Clavicle Status: Resulted - Requires Verification Done: 10May2007 03:50P  
+ + Creatinine Status: Resulted - Requires Verification Done: 05Sep2007 02:37PM  
+ + CRP Status: Resulted - Requires Verification Done: 04Sep2007 04:32PM

New Edit View Satisfy Reason Complete

Allergies Problem **Manual Activation**

- Click Satisfy Reason
- Click Manual Activation

TW Clinical P4 Hide VTB

**Chart** Clinical Desktop Task List Appointments Worklist Note

**Patient** **TRAINBouvier,Selma** **EnMRN:** 50011140 **SHC:** 900-111-040 **Other:**  
**Schedule** **Sex:** F **Age:** 28 Years **PCP:** FAMI  
**Charges** **Select Patient** **DOB:** 04/19/1983 **H Phone:** (555)851-6628 **Pri Ins:** (WEL)

Chart Clinical Staff View. Commit Pat Loc: Status:

Meds Orders Immunizations

All Meds/Orders Status

**Active**

- Albuterol 90 MCG/ACT Inhalation Aerosol Solution; INHALE 2 PUFFS EVERY 4-6 HOURS, SPACED 60 SECONDS APA  
Status: ACTIVE
- Aspirin 81 MG Oral Tablet; TAKE 1 TABLET DAILY; Status: ACTIVE
- ECG Status: Active Requested for: 27Oct2011**
- Keflex 500 MG Oral Capsule; TAKE 1 CAPSULE TWICE DAILY; Status: ACTIVE

- Click Commit

\*\*The EKG order is now active in Touchworks AND in the EKG Cart \*\*



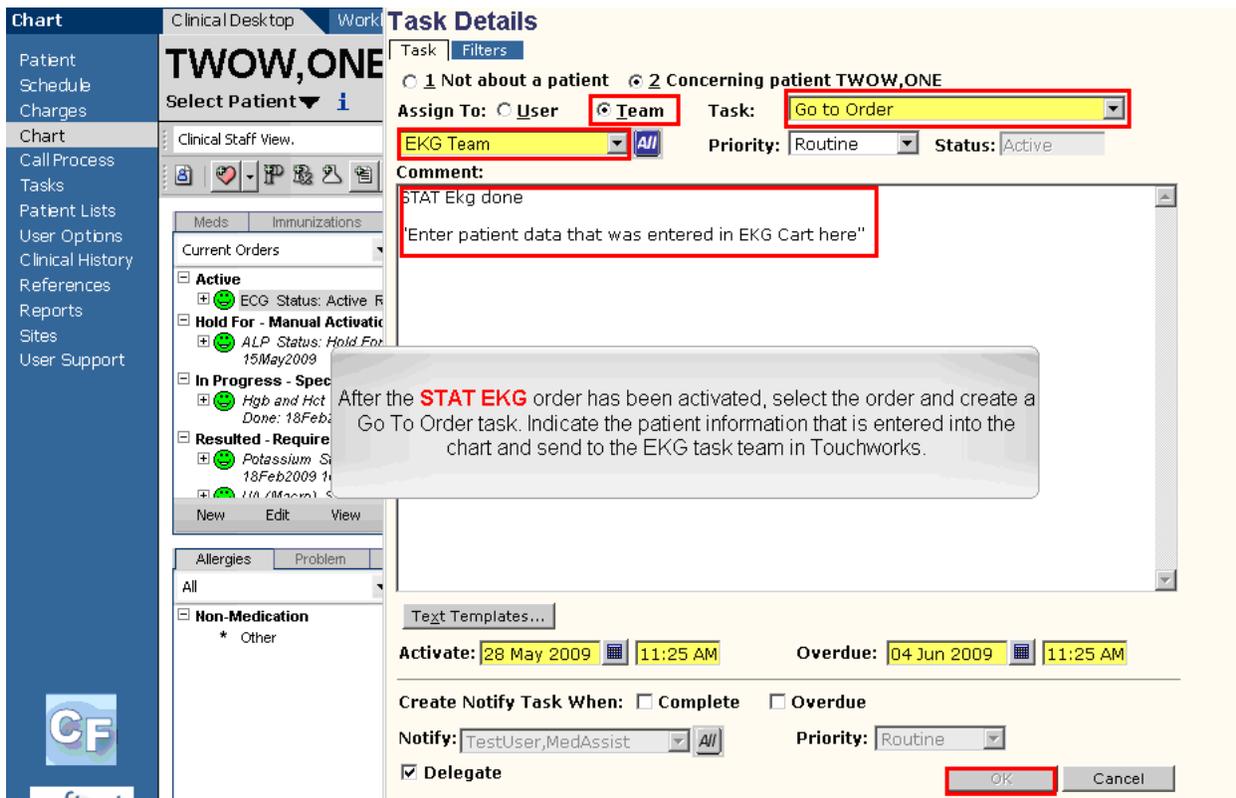
## What happens if there is an emergency and we have to perform the EKG STAT?

You can perform the EKG however you will have to manually enter the patient last name, first name and MRN (if available). If MRN is not available you can enter 9999999. After the EKG has been performed you can go back into the EKG cart and edit the information with the correct data. The EKG order will then need to be entered by the physician and activated by you.

After the STAT EKG order has been activated, select the order and create a Go to Order task. Indicate the patient information that is entered into the chart and send to the EKG task team in Touchworks.

1. Highlight the ECG Order and then Click on the New Task icon

The screenshot shows the 'Chart' section of a clinical application. The patient is identified as TRAINBouvier, Selma. The interface displays a list of orders under the 'Meds' tab. The first order is highlighted: 'ECG Status: Hold For - Manual Activation Requested for: 27Oct2011'. To the right of this order, there is a 'New Task' button. A red box highlights this button, and an arrow points to it from the text above. The interface also shows various other orders, including 'PAP Smear Exam' and 'Pathology Exam' orders, each with a status and a 'Requested for' date. At the bottom of the interface, there are buttons for 'New', 'Edit', 'View', 'Satisfy Reason', and 'Complete'.



2. Click Team at Assign To:
3. Select EKG Team from the drop-down menu
4. Select Go to Order from the Task drop-down menu
5. Type:  
STAT EKG done and \_(patient information that was entered in the EKG cart)\_
6. Click

