Patient Encounter: Orders

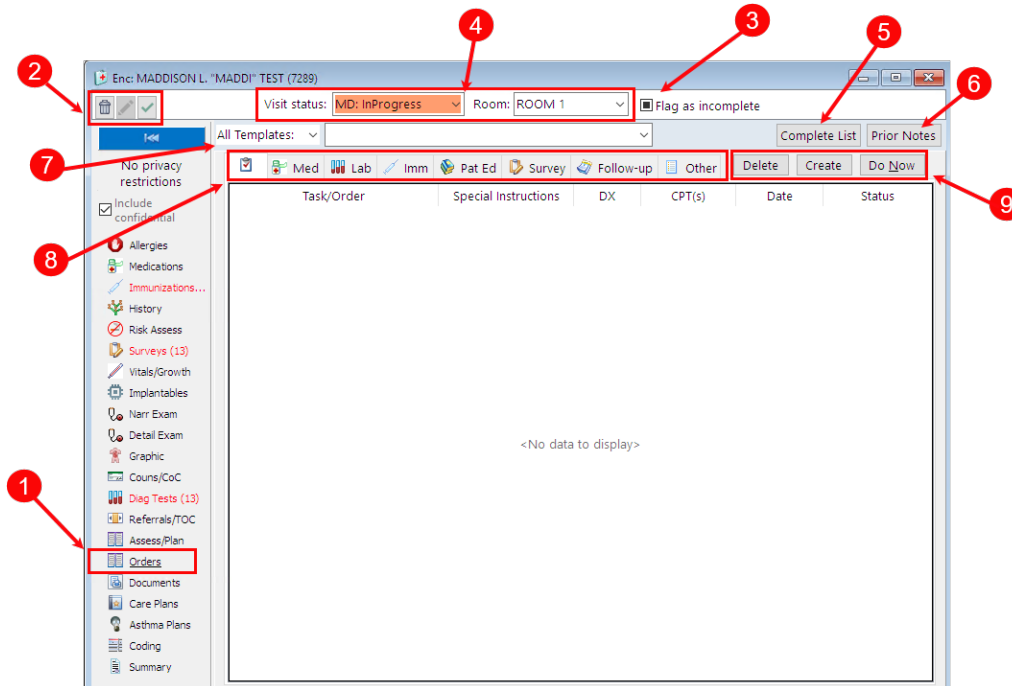Last Modified on 11/05/2021 3:40 pm EDT

Version 20.14

> This window map article points out some of the important aspects of the window you're working with in OP but is not intended to be instructional. To learn about topics related to using this window, see the **Related Articles** section at the bottom of this page.

About Patient Encounter: Orders

> **Path: Clinical, Practice Management, or Billing tab > Patient Chart button > Encounters > New or Open Note button > Orders**

The Orders window includes the Order Worksheet, allowing you to place lab orders, medication orders, patient education, surveys, and follow-up visits.

Patient Encounter: Orders Map

Number	Section	Description
1	Orders button	The **Orders** button opens the Orders window in the patient's Encounter note.
2	Encounter Function buttons	The Function buttons delete an entire Encounter note, edit an Encounter note, or save an Encounter note.
3	Flag as Incomplete checkbox	The Flag as Incomplete checkbox marks an Encounter as unfinished.
4	Visit Status and Room drop-downs	The **Visit Status** and **Room** drop-down menus allow the user to select the appropriate status and location of the patient. These selections update the Tracking and Calendar windows.

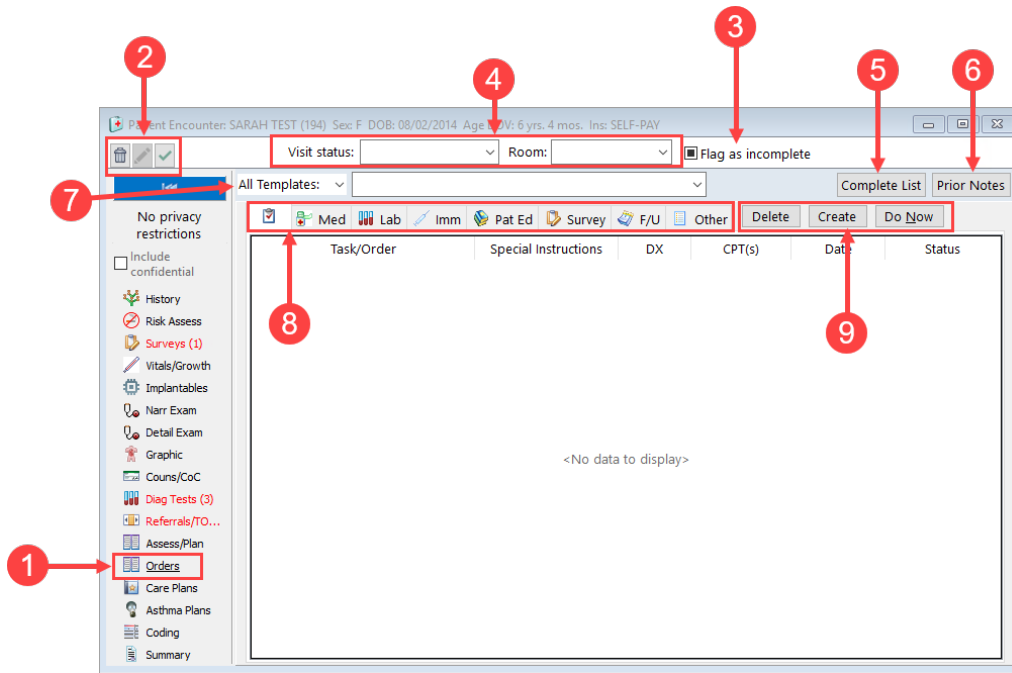| 5	Complete List button	The **Complete List** button provides a complete list of Encounter templates.
6	Prior Notes button	The **Prior Notes** button views prior notes and messages for the selected patient.
7	All Templates	The All Templates field is used to select an Encounter Template that was created or edited in the Encounter Template Editor. Predefined information populates in the Encounter when a template is selected.
8	Order tabs	The Order tabs are used to assign tasks to Departments within the Practice. Tasks can be associated to an Encounter or Well Visit Template and automatically populate the Order Worksheet. Tasks can also be assigned through each of the tabs located in the Orders window. Below is a description of what each tab is used for from left to right. • **Order Worksheet Summary:** Displays the tasks/orders with their corresponding special instructions, diagnosis, CPT codes, date, and status. • **Med:** Allows you to create, add, refill, print, send and review prescriptions. • **Lab**: Allows you to where you can add a diagnostic test, create a diagnostic test order, modify an order, and perform a diagnostic/test requisition. • **Imm:** Allows you to create and modify tasks for immunizations. Clicking the icon accesses the patient's immunization chart. Recommended vaccines are indicated at the bottom of the Order Worksheet. • **Pat Education**: Allows you to create, modify, and view resource/handout orders. • **Survey**: Allows you to create, modify, and administer surveys from this location. Clicking the Do Now button opens the Survey window. • **Follow-Up**: Allows you to create and modify follow-up orders, and select to schedule a follow-up from this location. Clicking the Do Now button opens the Schedule window. • **Other**: This is where you can add a referral letter, create tasks for miscellaneous activity, modify a task, and perform tasks. Clicking the Add Referral Letter button opens the **Referral/Care Transaction Details** window.
9	Delete, Create and Do Now buttons	• The **Delete** button detaches/removes the highlighted order. • The **Do Now** button performs the selected task. • The **Create** button creates a checklist of tasks for the current tab.

Version 20.13

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
## About Patient Encounter: Orders

Path: Clinical, Practice Management, or Billing tab > Patient Chart button > Encounters > New or Open Note button > Orders

The Orders window includes the Order Worksheet, allowing you to place lab orders, medication orders, patient education, surveys, and follow up visits.

Patient Encounter: Orders Map

Number	Section	Description
1	Orders button	The Orders button opens the Orders window in the patient's encounter note.
2	Encounter Function buttons	The Function buttons delete an entire encounter note, edit an encounter note, or save an encounter note.
3	Flag as Incomplete checkbox	The Flag as Incomplete checkbox will mark an encounter as unfinished.
4	Visit Status and Room drop-downs	The Visit Status and Room drop-down menus allow the user to select the appropriate status and location of the patient. These selections update the Tracking and Appointment windows.
5	Complete List button	The Complete List button provides a complete list of encounter templates.
6	Prior Notes button	The Prior Notes button views prior notes and messages for the selected patient.
7	All Templates	The All Templates field is used to select an encounter template that was created or edited in the Encounter Template Editor. Predefined information will appear in the encounter when a template is selected.
		The Order tabs are used to assign tasks to departments within the practice. Tasks can be associated to an encounter or well-visit template and automatically populate the Order Worksheet. Tasks can also be assigned through each of the tabs located in the Orders window.
		• : The Order Worksheet Summary tab displays the tasks/orders with their corresponding special instructions, diagnosis, CPT codes, date, and status.
		• Med : The **Medication Entry tab** allows you to create, add, refill, print, send and review prescriptions from this location.
		• Lab : The **Diagnostic Test and Lab Entry tab** is where you can add a diagnostic test, create a diagnostic test order, modify an order, and perform a diagnostic/test requisition from this location.
		• Imm : The **Immunization tab** allows you to create and modify tasks for immunizations in this location. Clicking the needle icon accesses the patient's

8	Order tabs	immunization chart. Recommended vaccines are indicated at the bottom of the order worksheet.
		Pat Ed : The **Patient Education tab** allows you to create, modify, and view resource/handout orders from this location. **Sur** : The **Survey tab** allows you to create, modify, and administer survey orders from this location. Clicking the Do Now button opens the Survey window. **F/U** : The **Follow Up Task tab** allows you to create and modify follow up orders, and select to schedule a followup from this location. Clicking the Do Now button opens the Schedule and Practice Workflow window **Oth** : The **Other Task tab** is where you can add a referral letter, create tasks for miscellaneous activity, modify a task, and perform tasks from this location. Clicking the Add Referral Letter button opens the **Referral/Care Transaction Details** window.
9	Delete, Create and Do Now buttons	- The **Delete** button detaches/removes the highlighted order. - The **Do Now** button performs the selected task. - The **Create** button creates a checklist of tasks for the current tab.