**Order Set Review Process (combined paper and electronic orders)**

Research Implementation Office, [rio@seattlecca.org](mailto:rio@seattlecca.org), 206-606-7116

Clinical Information Systems (CIS) team has created an email distribution list: CIS Research Orders ([cisresorders@seattlecca.org](mailto:cisresorders@seattlecca.org)) which includes CIS builders and Clinical Informatics Research analysts. Please contact this distribution list for requests or questions related to electronic orders for research.

**Overview:**

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<th>RESPONSIBLE</th>
<th>TAT</th>
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<td>Request template/current orders from RIO (paper), and CIS (electronic orders)</td>
<td>Study Staff</td>
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<tr>
<td>Develop Order Drafts</td>
<td>Complete Research Electronic Orders build template</td>
<td>Study Staff, CIS</td>
<td>14 days</td>
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<td>Send Research Electronic Orders build template to CIS</td>
<td>Study Staff</td>
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<td>Draft Paper Orders</td>
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<td>Build Electronic Orders</td>
<td>Build electronic orders, work with Study Staff to clarify build request specs</td>
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<td>Respond to CIS questions to finalize design of electronic orders</td>
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<td>Adjust electronic orders</td>
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<td>UW Pharmacy IT Med build</td>
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<td>Test Electronic Orders</td>
<td>Functionality Testing</td>
<td>CIS</td>
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<td>Send electronic orders to study staff for review and validation</td>
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<td>Review and approve electronic order build</td>
<td>Study Team</td>
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<td>Submit order set (paper and electronic) to RIO</td>
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<td>RIO</td>
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<td>Distribution to reviewers</td>
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<td>Comments from reviewers</td>
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<td>Response to comments</td>
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<td>Study Staff, RIO, CIS, Reviewers</td>
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<td>Orders Action List</td>
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<td>Response to Orders Action List</td>
<td>Study Staff, CIS</td>
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<td>Distribution to reviewers</td>
<td>RIO</td>
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<td>UW Change control (electronic)</td>
<td>CIS</td>
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PREPARATION

Access order templates via Research Staff Resources under Guidelines section.

FOR NEW ORDER SET:
1. If template paper orders are not available, contact RIO for copies of approved orders for a similar study, that may be used in lieu of a template.
2. Download the Research Electronic Orders Build Excel template here: https://www.seattlecca.org/research-staff-resources/orca-research-powerplans

FOR MODIFIED ORDER SET:
1. Contact RIO for the current approved protocol specific paper orders.
2. Contact CIS for the current approved protocol specific electronic orders. The Clinical Information Systems (CIS) team has created an email distribution list: CIS Research Orders (cisresorders@seattlecca.org) which includes CIS builders and Clinical Informatics Research analysts. Please contact this distribution list for requests or questions related to electronic orders for research.

DEVELOP ORDER DRAFTS

DRAFT NEW POWERPLANS:
1. The Research Electronic Orders Build Excel Template must be completed for all SCCA and UWMC electronic research orders (Regimen and Power Plans) and reviewed by study staff prior to submission to RIO. The build request template is located on the Research Staff Resources website or by contacting CIS.
2. Submit the completed Research Electronic Orders Build Excel Template to CIS.
   - Use template e-mail subject line: NEW <service> Electronic Orders Build Request: <Protocol #> (SCCA and/or UWMC Plans Only)
   - Review research electronic orders (Regimen and PowerPlans) for accuracy and completeness when returned by CIS.

DRAFT MODIFIED POWERPLANS:
1. Request current version of electronic order from CIS.
2. Make edits to the electronic orders using tracked changes on Word document.
3. Submit the tracked changes electronic order download file to CIS.
4. Use template e-mail subject line: <Service> Electronic Orders Update Request: <Protocol #> (SCCA and/or UWMC Plans Only).
5. Review protocol-specific electronic orders for accuracy and completeness when returned by CIS.

DRAFT NEW PAPER ORDERS:
1. Access the approved blank templates on the Research Staff Resources website, or
2. Reference the Research Implementation Review Summary (RIRS) for all order recommendations
3. Ensure that the paper order references the electronic order using the exact name.

DRAFT MODIFIED PAPER ORDERS:

8/6/2019
1. Request the most recent approved protocol specific paper order(s) from RIO.
2. Use the track changes feature in Word to indicate modifications to the order(s).

**BUILD POWERPLANS**

Respond to CIS questions to finalize design of research electronic orders (Regimen and PowerPlans).

**TEST POWERPLANS**

Review and approve research electronic orders (Regimen and PowerPlan) build.

1. CIS will perform functionality testing of the research electronic orders.
2. CIS will send the research electronic orders to the study team to review and approve.
3. Review the research electronic orders to ensure they match the build request.
4. Copy (CC) the CIS analyst/team on RIO Submission email indicating your approval of the electronic orders.

**SUBMISSION**

RIO requires the complete ordering set (all paper orders, Regimen and PowerPlans) to initiate the review process

**SUBMIT ORDERS TO RIO:**

1. Indicate in your e-mail subject line: **<Protocol #> Order Set NEW or MODIFIED.**
2. Indicate the number of orders being submitted in the body of the email: **NEW** orders - # Regimen, # PowerPlans, # paper orders and **MODIFIED** - # Regimen, # PowerPlans, # paper orders
3. Copy (CC) the CIS analyst/team.
4. Ensure that the new paper order(s) do NOT contain tracked changes.
5. Ensure that modified paper orders DO contain tracked changes.
6. Attach protocol-specific paper order(s), Powerplans(s), and the regimen.
7. **FOR MODIFIED ORDERS:** Describe any changes to the ordering plan since the protocol implementation review and attach the amended protocol.

**TRIAGE**

**RIO Triage:** RIO will review orders for completeness and consistency and will send any edits back to the study staff to approve prior to distribution. RIO will also determine the operational review needs (in-person, e-review, FYI). An orders implementation review date will be scheduled if needed.
Response to Triage: Review any administrative tracked changes to the paper orders. “Accept” agreed upon edits within the document or provide comment within if you don’t agree. Return orders to RIO.

Distribution to reviewers: RIO will distribute the complete order set to the designated (IPIM/PIM/CTI) committee and all impacted service areas for review.

Comments from reviewers: RIO will receive all comments from committee members and operational user-groups. These comments will be combined into a single packet and sent to the study staff and CIS along with the most current versions of the orders.

Response to comments: The study staff and CIS will respond to the comments within the pdf and return to RIO.

Implementation Review Meeting: The study staff (and/or PI) should come to the meeting prepared to represent the needs of the protocol.

1. During the meeting, please take note of all action items required from the committee.
2. CIS will take notes of any electronic order action items. RIO will facilitate the meeting and take meeting notes.

Orders Action List: Provided within 5 days of Implementation Review Meeting.

1. RIO will provide an enumerated Orders Action List to the study staff and CIS via email (with instructions).
2. Study staff will update the paper orders and work with CIS to update the electronic orders based on the Orders Action List.

Response to Orders Action List: After review of the final draft electronic and paper orders, study staff will forward all orders (paper and electronic) to RIO with the completed and initialed Orders Action List.

Validation:

Distribution to reviewers: Upon receipt of a complete re-submission, RIO will circulate the updated orders only to Reviewers who commented so they may validate needed changes.

Reviewer validation: Reviewers will indicate to RIO and the study staff that the requested action items have been completed to their satisfaction.

8/6/2019
Distribute orders to SMPG and PI: For IMTX and BMT order sets, if there is investigational product or drug involved, RIO will send orders to Safe Medical Practice Group (SMPG) physicians. If there are suggested edits that relate to patient safety, there needs to be a peer-to-peer conversation between the MD reviewer and the PI regarding updates, with updates made as needed.

**SMPG approval:** SMPG representatives indicate to RIO and the study staff that edits related to patient safety have been addressed to their satisfaction.

**PI approval:** The PI indicates to RIO that the orders are approved and given permission to be made available for use.

Additionally, RIO email study staff requesting how many copies of paper orders they would like printed and stocked in various locations in the SCCA Clinic (Allogenic, Autologous, IMTX) and/or at UWMC (7NE and 8NE).

**FINALIZATION**

**Announcement to Storeroom (paper orders):**
Following PI approval,

1. RIO will release the paper orders to Materials Management.
2. The announcement e-mail will indicate the number of orders requested to be stocked in each designated SCCA/UWMC location with copies of the approved orders attached.

**UW Change Control (electronic orders and regimen):** Once the PI has approved the order set, CIS will submit the electronic orders for UW Change Control Agenda for placement into production. This process may take up to two weeks after the weekly UW Change Control meeting.

**CIS will email Study Staff and RIO when research electronic orders are available in production** and an announcement will appear in the weekly ORCA Key Update.