



# Entering Infusion Plans Into Epic

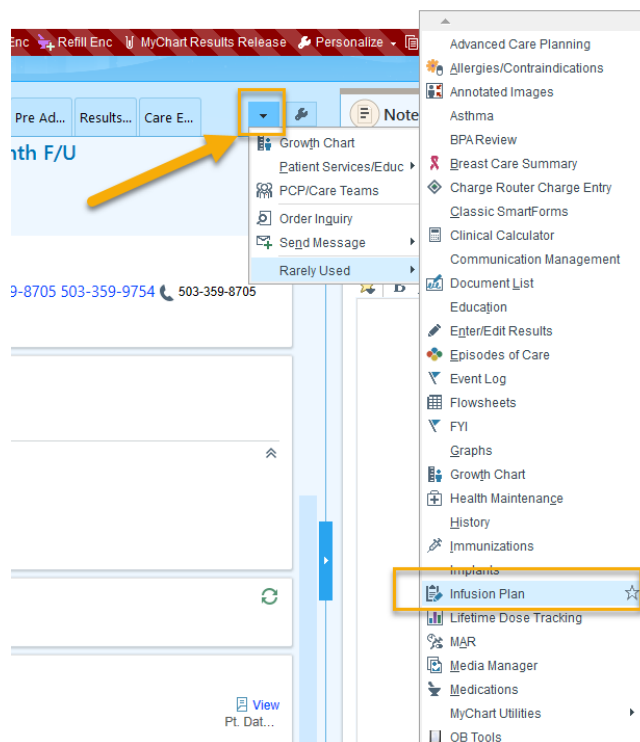
## Providers in Non-Oncology Departments

### Key points:

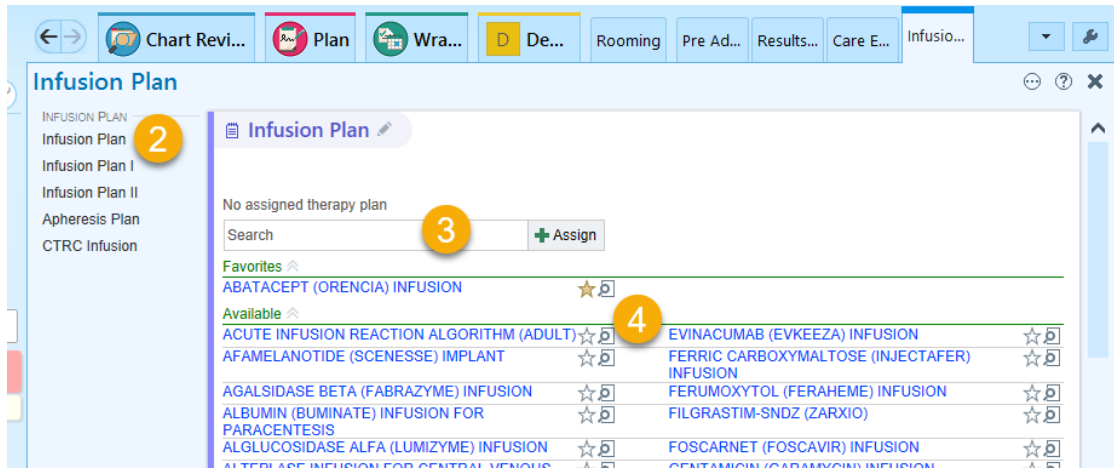
- ✓ Order Entry encounters can be used to enter infusion plans outside of an office visit encounter
- ✓ A height and weight might need to be entered in the encounter for dosing for some medications
- ✓ If a plan requires specific labs to be done prior to receiving an infusion (e.g. a PPD or QuantiFERON Gold blood test) they MUST be completed before the patient is scheduled, unless other arrangements have been made with the infusion clinic
- ✓ You must route the encounter to your HPC (Health Plan Coordinator) to notify them to create the referral. (Note that without a referral the infusion center does not get notified of the order being created).

### Instructional Guide:

1. Within an Encounter, open the Infusion Plan activity. It may be located in the More Activities dropdown options:

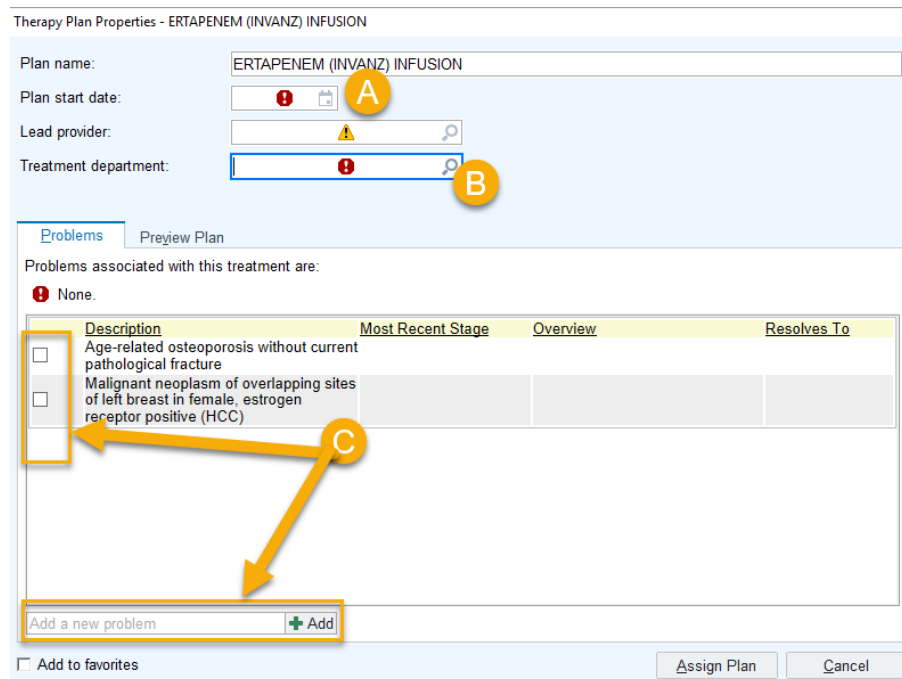


2. Patient's may have more than one infusion plan assigned. If a section already has an infusion plan assigned, choose the Infusion Plan I or Infusion Plan II section to enter your plan.
3. Search for your desired infusion plan, or select the plan from the list of Available plans below the Search window.
4. Use the spyglass button to preview the plan. Click the star to mark the plan as a favorite, which will put it at the top of available plans.



## Try it out: Adjust Therapy Plan Properties

1. Once a plan is selected, the Therapy Plan Properties window will open. In this window you MUST:
  - a. Enter a plan start date (an estimate date is appropriate).
  - b. Enter Treatment Department. (The HMC infusion department is: TUA HEM TREATMENT 8<sup>TH</sup>)
  - c. Associate a Problem to the plan.
    - \*Leave the Lead provider field blank.
2. Click Assign Plan.



## Try it out: Modify the Infusion Plan As Needed

Use the following as a guide to modify the infusion plan:

- Add any additional orders (see instructions below)
- Complete the Scheduling Instructions order.
- Complete all stop signs in each order and also ensure all order details are correct.
- Unselect any unnecessary orders.
- Click the Sign Plan button to sign the selected orders.

The screenshot shows the Epic Infusion Plan interface. The top navigation bar includes buttons for Chart Review, Plan, Wrap Up, Demographics, Rooming, Pre Admission, Results Review, Care Everywhere, and Infusion Plan. The main content area is titled 'Infusion Plan I' and shows details for 'ERTAPENEM (INVANZ) INFUSION' starting on 4/26/2022, which is 'Not assigned'. A yellow banner indicates 'Plan Not Signed' with instructions to select orders and click 'Sign Plan'. Below this is a table of orders with columns for Interval, Duration, and Due. The table lists several orders, including 'ADULT INFUSION PLAN SCHEDULING INSTRUCTIONS' (highlighted with a yellow box and letter B), 'COMPLETE METABOLIC PANEL - OLP' (highlighted with a yellow box and letter D), and 'CBC WITH AUTO DIFF - OLP'. A 'Nursing Orders' section is also visible, containing 'NURSING COMMUNICATION #1' (highlighted with a yellow box and letter C). At the top right of the plan area, there are buttons for 'Sign Plan' (highlighted with a yellow circle and letter E), 'Next', 'Edit Interval', and 'Actions'. A 'Show: Order Details' checkbox is also present. On the left side, a sidebar lists various plan types like 'Infusion Plan I', 'Infusion Plan II', 'Apheresis Plan', and 'CTRC Infusion'. The 'Add a new order' button is highlighted with a yellow box and letter A.

	Interval	Duration	Due
<input checked="" type="checkbox"/> Other			
<input checked="" type="checkbox"/> ADULT INFUSION PLAN SCHEDULING INSTRUCTIONS Order details FOR URGENT INFUSIONS, PLEASE CALL THE INFUSION UNIT! Start date for infusion: *** LOCATION: {Infusion Units:355668} Other comments:	Every visit		Every visit
<input checked="" type="checkbox"/> Labs-Outpatient			
<input type="checkbox"/> COMPLETE METABOLIC PANEL - OLP Clinic Collect	Weekly: Mon		Mon 5/2/2022
<input checked="" type="checkbox"/> CBC WITH AUTO DIFF - OLP Clinic Collect	Weekly: Mon		Mon 5/2/2022
<input checked="" type="checkbox"/> Nursing Orders			
<input checked="" type="checkbox"/> NURSING COMMUNICATION #1 Order details {Clinic/provider following IV antibiotic course:19224:::1}	Every visit		Every visit

## Try it out: Route the Encounter to HPC for Referral Creation

1. Use the Follow-Up section of the encounter (located in Wrap Up) to send an In Basket message to your clinic's HPC pool to create the referral and to the TUA HEM ONC INFUSION FRONT DESK in basket pool.
2. Write in the comment box "please create the referral to infusion".

For:  Follow up 2 weeks after procedure

[Hide additional options](#)

Additional Details

Check-out note:

Follow-up:

Instructions:

Remind me to:

Send Chart Upon Closing Workspace

[+ My List](#) [+ PCP](#) [+ Other](#) [Remove All](#)

[P TUA GI HPC](#) [P TUA HEM ONC INFUSION FRONT DESK](#)

Comments: [High Priority](#) [Low Priority](#)

please create the referral to infusion

Characters remaining: 986

[Send Now](#) [Full Routing History](#)

Once the referral is created, it will drop into the infusion workqueue. The lead nurse and pharmacist will review the infusion plan and insurance prior authorization will be obtained by the Infusion Staff. Once the authorization is received and the plan is reviewed, Infusion will call to schedule the patient.

### To add additional orders to the Infusion Plan:

If needed, you can add additional orders to the infusion plan:

1. Use the Add a new order search field on the top left of the Plan (see above screen shot)
  - a. Medications: Medications to be administered in the infusion clinic MUST have a "bed" icon beside the orders for the infusion unit to be able to administer them.

During Visit Medications		
	Code	Name
	38294	TYLENOL (aka acetaminophen (TYLENOL MELTAWAYS) rapid dissolve tablet)

- b. Labs: Labs and other procedure orders to be completed in the infusion clinic MUST have the "bed" icon next to them in order to be properly processed by the infusion unit.

During Visit Procedures		
	Code	Name
	LAB00247	CBC ONLY

- Complete the order details, including the Order Schedule items for Category (e.g Labs-Outpatient for lab orders and Routine Medications for routine meds) and Interval. Both of these fields must be completed before you can sign the orders.

CREATININE CLEARANCE, URINE AND SERUM

**Order Schedule**

Group with protocol: Iron Sucrose Initial Dc

Category: [Red error icon]

Interval: [Red error icon]

Minimum separation: [Calendar icon] days

Defer until: [Calendar icon]

Duration:  Until discontinued  
 [Calendar icon] treatments  
 Until [Calendar icon]

**Order Details**

Frequency: ONCE [Search icon] [Collect]

The Order Schedule is specific to Infusion Plan orders and the order Category, Interval, and Duration are required. This information communicates the frequency of the order and determines when the order should be flagged as “Due”. See below for helpful information on these and other Order Schedule fields.

<b>Category</b>	Determines the section in the plan where the order appears; helps communicate in what order the treatment should proceed (e.g. pre-infusion vs. post-infusion)
<b>Interval</b>	Determines how often this order is to occur
<b>Minimum separation</b>	The number of days that should pass between each instance of the treatment order
<b>Defer Until</b>	Sets the due date for the first instance of an order
<b>Duration</b>	Until Discontinued: unlimited instances of the order will be available for release For # treatments: allows for specifying the number of instances needed

## Let us help you!

For training support related to the clinical use of Epic, contact Clinical Education Services at [learning@ohsu.edu](mailto:learning@ohsu.edu) or call 503.494.8185.

## Need technical support?

For technical support related to the use of Epic or to report issues, contact the Epic Support Desk at 503.494.2222, option 2.

For technical support related to the use of Epic at Tuality or to report issues, contact the Tuality Epic Support Desk at 503.681.1097, option 2.