University of Miami Clinical Enterprise Technologies

Our Mission:

To design and deliver ongoing support for a network of Business and Clinical Information Management Systems which enhance the academic and research vision while implementing significant improvements in the quality, safety, and profitability of the UM clinical enterprise.

Our Vision:

To improve the processes and outcomes of the clinical enterprise by the widespread adoption of the latest information technology within a digital organization.
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Course Objective:

IntelliDose for Providers (ARNP, PA, Fellow, Resident, Attending Physician)

- Enroll a patient into Intellidose
- Assign a treatment plan
- Enter an order
- Send order to the Pending queue (ARNP, Fellow, Resident)
- Sign an order (Attending Physician only)
- Edit an Order
- Reschedule an Order
- Split an Order

Description:
This course provides the user with the knowledge to enroll patients, assign treatment plans and enter orders for chemotherapy regimens. Upon completion of this course the user will be able to enter an order on IntelliDose.

Duration:
2 Hours

Course Outline:
1) Lookup a patient using the UMHC MRN
2) Enroll a patient in IntelliDose
   a) Enter the patient information on the Patient Wizard
      i) Weight and Height
      ii) Attending
      iii) Dx/date
      iv) ICD9
      v) Path
      vi) TNM
      vii) Stage
      viii) Allergies
   b) Complete Registration
3) Assign a treatment plan based on the diagnosis
   a) Locate patient
   b) Verify demographics
   c) Assign treatment plan
      i) Treatment Plan nomenclature
      ii) Search for disease specific treatment plan
      iii) Select start date
      iv) Review Day#1 cycle
      v) Select Inpatient/Outpatient Tagging
      vi) Select Subsequent Orders
4) Enter the Orders
   a) Drugs
      i) Dosing Rules
         (1) Delete drugs
         (2) Add drugs
      ii) Dosing Limits
      iii) Infusion Rules
      iv) Miscellaneous
   b) Tests
      i) Review test on LabViewer
   c) IV Fluids
      i) Administration Rules
      ii) Additives & Misc Admin Instructions
   d) eNurse Script
   e) Miscellaneous
   f) Citations
5) Queue order (ARNP, Fellow, Resident ONLY)
   a) Save order
   b) Assign a co-signer
6) Sign the order
   a) Entered by the Attending Physician
   b) Entered by ARNP, Resident or Fellow
      i) Open Co-signer queue
         (1) Review order
         (2) Sign order
7) Edit an Order
   a) Editing order with the following statuses:
      i) Next
      ii) Queued
      iii) Pending
      iv) Signed
      v) Written
      vi) Executed
   b) Reschedule an Order
   c) Split an Order
      i) Change dates for subsequent cycles
      ii) Change dates for current cycle
IntelliDose Order Process Overview

Fellow/ARNP
- Fellow or ARNP enters chemotherapy order
  - Next
- Fellow or ARNP saves and queues chemotherapy order to Physician
  - Queued
  - Pending
  - Signed
  - Written

Physician
- The Attending Physician reviews the order and co-signs it
  - Pending

Charge Nurse
- The Charge Nurse reviews the order and releases it to Pharmacist
  - Signed

Pharmacist
- Pharmacist reviews order and releases it for assigned nurse to execute
  - Written

Assigned Nurse
- Assigned Nurse administers drugs and documents administration.
  ONLY CTU CHAIRSIDE WILL DOCUMENT IN INTELLIDOSE
  - Executed
Log On

IntelliDose training is scheduled following receipt of a complete system access form. A User ID and Password is assigned after training. For security purposes, change your password.

To change your password:
1. Enter your assigned User ID
2. Enter your assigned password
3. Click the Reset Password Check box.
4. Then click Login

Password Rules
- Minimum 8 characters
- Maximum 10 characters
- Case sensitive
- At least 1 upper case letter
- At least 1 number or special character

Enter the new password twice.
Click OK.

If the OK button is not active, the two entries of the password do not match.
Patient Look-Up

IntelliDose opens to the Find a Patient Screen

You may:
1. Enter a complete or partial last name for an alphabetical listing of all patients whose last name meets the criteria entered.
2. Enter a UMHC Medical Record Number
3. Click on a letter of the alphabet for all patients whose last name begins with that letter.

In this example, last names beginning with ‘Bat’ are displayed.

To select a patient, double click on the name.

When two or more patients have the same last and first names (even though all other fields are different), they are highlighted in red. Using Medical record number, account number and physician, verify that the correct patient is selected.

The Chemotherapy Record for the selected patient opens.
Pop-up Notes

The Pop-Up Note should be utilized as a communication tool for incidental information to be shared between physicians, nurses and pharmacy. **The Pop-Up Note is NOT a legal document and NOT a part of the patient's record.**

**DO NOT WRITE ORDERS** (i.e., "ok to treat", medication orders, lab orders) or other legal documentation in the Pop-Up Note Window.

You may access the Pop-Up Note by clicking on the blue note pad.

Pop-Up Note Window Appears

Click the check box to show the Pop-Up note when patient’s record is retrieved. When note is no longer necessary, simply remove check mark and the Pop-Up note will no longer appear.
## Toolbar and Icons

<table>
<thead>
<tr>
<th>Icon</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="New" /></td>
<td>Enroll New Patient&lt;br&gt;Order tab = Additional Order&lt;br&gt;Diagnosis tab = Assign New Treatment Plan</td>
</tr>
<tr>
<td><img src="image" alt="Look up" /></td>
<td>Look Up Patient Record</td>
</tr>
<tr>
<td><img src="image" alt="Post" /></td>
<td>Post Vital Signs</td>
</tr>
<tr>
<td><img src="image" alt="Enter" /></td>
<td>Enter Lab Results <em>(N/A)</em></td>
</tr>
<tr>
<td><img src="image" alt="Post" /></td>
<td>Post I&amp;Os (Input and Output)</td>
</tr>
<tr>
<td><img src="image" alt="Document" /></td>
<td>Document IV Access</td>
</tr>
<tr>
<td><img src="image" alt="Post" /></td>
<td>Post Pain Assessment</td>
</tr>
<tr>
<td><img src="image" alt="Post" /></td>
<td>Post Drug Verification</td>
</tr>
<tr>
<td><img src="image" alt="Post" /></td>
<td>Post Toxicity</td>
</tr>
<tr>
<td><img src="image" alt="Use" /></td>
<td>Use a Checklist</td>
</tr>
<tr>
<td><img src="image" alt="View" /></td>
<td>View Treatment Plans</td>
</tr>
<tr>
<td><img src="image" alt="Prepare" /></td>
<td>Prepare / Write Orders – Opens to drug screen for review / sign process</td>
</tr>
<tr>
<td><img src="image" alt="Log in" /></td>
<td>Log In / Log Out</td>
</tr>
<tr>
<td><img src="image" alt="Post" /></td>
<td>Post Height and Weight</td>
</tr>
<tr>
<td><img src="image" alt="Enter" /></td>
<td>Enter X-ray, Other Results <em>(N/A)</em></td>
</tr>
<tr>
<td><img src="image" alt="Establish" /></td>
<td>Establish IV Access</td>
</tr>
<tr>
<td><img src="image" alt="Monitor" /></td>
<td>Monitor IV Infusion</td>
</tr>
<tr>
<td><img src="image" alt="Post" /></td>
<td>Post Teaching</td>
</tr>
<tr>
<td><img src="image" alt="Post" /></td>
<td>Post Double Drug Verification</td>
</tr>
<tr>
<td><img src="image" alt="Record" /></td>
<td>Record Performance Status</td>
</tr>
<tr>
<td><img src="image" alt="Write" /></td>
<td>Write a Pop-Up Note</td>
</tr>
<tr>
<td><img src="image" alt="Cosign" /></td>
<td>Cosign</td>
</tr>
</tbody>
</table>
Order Tab Icons

<table>
<thead>
<tr>
<th>General</th>
<th>Medical</th>
<th>Social</th>
<th>Dx 1</th>
<th>Dx 2</th>
<th>Orders</th>
<th>eNurse</th>
<th>MAR</th>
<th>Tests</th>
<th>Metrics</th>
</tr>
</thead>
</table>

Prepare / Write Orders –

Send Back / Undo

Edit Last Written Order Set

Hold Orders

Delay Orders

Change Going Forward

Delete Going Forward

Delete One Order Set

Delete All Unwritten Orders of the Same Treatment Plan

Extend Therapy

Rename Orders

Reschedule Orders

Print List of Orders

Print Treatment Calendar

Additional Order

Assign Tx Plan

Dx 1

Dx 2

The orders displayed are assigned to the Diagnosis selected
Chemotherapy Record

Chemotherapy Record – General

The Chemotherapy Record for a patient opens to the General tab. This contains information entered when the physician enrolled the patient in IntelliDose.

Chemotherapy Record – Medical

The top portion Medical tab is subdivided into five sections: Problem List, Social History, Past Family History, Past Med History and Miscellaneous.

The bottom portion (Medications and Allergies) displays with all Medical tab sections.

Chemotherapy Record – Medical/Allergies

To add ‘Allergies/Hypersensitivities’:
Click on the first blank line.
As you begin to type a drug, an alphabetical list displays.
Select the desired drug.
Enter the type of reaction in the Reaction column.

To add an ‘Other Current Medication’
Click on the first blank line.
As you begin to type a drug, an alphabetical list displays.
Select the desired drug.
In the Dosing Rules column, enter the dose and route.
## Chemotherapy Record – Medical/Problem List

Problems are entered by clicking the New Problem button. Then select from the list.

## Chemotherapy Record – Medical/Social History

This is a free text field. Double click to open and enter or edit data.

## Chemotherapy Record – Medical/Past Family History

This is a free text field. Double click to open and enter or edit data.

## Chemotherapy Record – Medical/Past Med History

This is a free text field. Double click to open and enter or edit data.

## Chemotherapy Record – Social

Contacts: Includes name, address, phone and relationship
- Click New to add
- Click Edit/View to revise

DNR Status: Includes effective date and who entered information in system

Advance Directives: Includes date and who entered information in system

Miscellaneous: Click the drop-down menu to select
Chemotherapy Record – Dx 1

Chemotherapy Record: Information pulls from patient’s enrollment in IntelliDose

Chemotherapy Record: Includes all Treatment Plans which have been assigned for this diagnosis

Chemotherapy Record: Based upon user security non-malignancy diagnosis may be added

Chemotherapy Record – Dx 2

Dx 2: This is used for a second primary malignancy. It may also be used for co morbidities (ex. MDS, anemia, thrombocytopenia, etc.). The treatment history is specific to the diagnosis. The secondary diagnosis displays on both Dx 1 and Dx 2

Chemotherapy Record – Orders

Lists all cycles of assigned treatment plans

Chemotherapy Record - eNurse

The eNurse tab is for nursing documentation of nursing care and medication administration. The Nursing Actions are not created until an order is in Written status.

Refer to page 16 for information on eNurse documentation.

Chemotherapy Record - MAR

The MAR list all medications included in the ordered treatment plans once they are in Written status. Documentation entered in eNurse is shown on the MAR.
Chemotherapy Record - Tests

The Test tab is designed to display lab result. This function is not currently used at UMHC/SCCC.

For lab results, please use the Lab Viewer application.

Chemotherapy Record –

Metrics/Height & Weight
The baseline weight is entered by the physician during patient enrollment. The baseline weight is changed only by the physician. All entries of the height and weight are displayed.

Vital Signs
Displays all entries of vital signs

I&O
Displays recorded intake and output
Enrolling a New Patient in IntelliDose

On the IntelliDose Toolbar, click the New icon.

Enter the patient’s IDX Medical Record Number. Click Search.

General Information

The Demographic information and Diagnosis are pulled from IDX.

Required fields include
- Initial Height/Weight (Baseline)
- Attending MD (Oncologist)
- Diagnosis – Revise if necessary
- Allergies
- Staging – Some diagnosis have a staging wizard, others require manual entry of the stage.
- Pathology and date may be required for some diagnosis

Information from the enrollment is displayed in the General, Medical and the Diagnosis sections.
Assigning a Treatment Plan

| Treatment Plans may be assigned from the Diagnosis tab or the Orders tab. |
| From the Treatment History area: |
| Click the New icon. |
| From the Orders tab: |
| Click the Assign Tx Plan button |

| Treatment Plans with multiple drugs are named with the drugs in alphabetical order. |
| 1. The Assign Treatment Plan screen opens to an alphabetical list of Disease Specific Treatment Plans. |
| 2. The display may be changed to Stage Specific or All Treatment Plans. |
| 3. Clicking on a letter of the alphabet or typing in the top field will advance the list forward alphabetically. |
| 4. The filter list may be used to limit the search to Treatment Plans containing a specific drug. |
| 5. If the patient has received one or more cycles, indicate which cycle will begin the treatment in IntelliDose. |
| 6. View will open the highlighted plan for review. |
| 7. Select the desired plan and Click Assign Tx button |

| Answer the questions regarding any previous chemotherapy the patient has received. |
| Then click OK. |
On all calendars in IntelliDose, the current date is circled in red.

Select the date the patient will receive the first cycle.

Click OK.

All cycles of the treatment plan are added to the Orders. The first cycle is highlighted in green and has a status of NEXT.
Preparing / Signing Orders

Double click the cycle in Next status

The scheduled start date is indicated in blue.
To reset the start date refer to page 20

Indicate the orders for Inpatient or Outpatient use

Click Continue

Drugs

The order opens to the Drugs screen – Dosing Rules

Drugs - Dosing Rules
Multiple entries of the same category are highlighted. These may be different doses of a drug or a choice of drugs.
In this example, the types of access devices are listed. Only one selection from each highlighted list may be chosen.
Double click to select, then click Yes to confirm.
Drugs - Dosing Rules
To add a drug:
Click the Drug Name column of an empty row
Type the drug name, select from the drop-down.
Complete all columns
NOTE: Chemotherapy drugs may not be added.

To delete a drug:
Highlight the drug to be deleted from this cycle.
Click the X to delete

Drugs - Dosing Limits
The Rounding units may be changed on this tab.

Drugs - Infusion Rules
These Infusion Rules are for the administration of drugs.
The information in all columns may be edited.

Drugs - Miscellaneous
Highlight the specific drug to view the miscellaneous information.
All PRN orders must include “indication for use”
“Show on Flowsheet” must be checked for drug to be included on flowsheet
This information prints on the order and/or the eNurse documentation fields.
All scripts must include the dispense & refill fields before the order may be signed

Tests
Additional lab tests may be added
Select from Available tests.
Click the down arrow
IF a needed test is not ‘Available Tests’ listing, it can be written on the Miscellaneous order page
Lab tests may be deleted.
Click the test to highlight
Click the up arrow to remove from this cycle
**IV Fluids / Administration Rules**

This refers to hydration fluids – not used for the administration of chemotherapy drugs.

All fields may be edited

Additional fluid orders may be added

**IV Fluids / Additives & Misc Admin Instructions**

Admixtures Column

Enter any additives

Misc Hydration Instructions Column

Enter any special instructions (ex. Infuse after chemo infusion complete)

**eNurse Script**

Shows the items for nursing documentation which will be generated when the order is in a Written status

**Miscellaneous**

Scroll to view the additional orders.

To edit, double click in the Miscellaneous Orders area

**Miscellaneous**

To edit an order, enter a solid line at the bottom. Write additional orders below the line.

**Save the Order**

An order may be prepared in advance, then saved for review prior to the patient’s visit. For an ARNP or a PA to save the orders:

- Click the Save button
- Select the physician and click Save
- The status changes to Prepared
Queue an Order for the Physician

Only a physician may sign an order which includes chemotherapy drugs. A PA or ARNP may prepare the orders then queue them for the physician.

Click the Save button
Select the physician and click Select
The status changes to Queued

Sign an Order

Only a physician may sign an order which includes chemotherapy drugs. An ARNP or PA may sign non-chemotherapy orders.

Click the Sign button
The status is changed to Pending
Adding an Order

On the Orders tab, click the Additional Order button.
The Additional Order line has a status of Next. If the order is for a drug, double click the additional order line to open the order for preparation.

Current date is highlighted.
NOTE: All additional orders are for today’s date. Cannot be entered for additional days. This is a one time order and will not repeat for future orders.

Mark patient type as Inpatient or Outpatient

Click Continue

Order Entry screen opens to Dosing Rules

To add a drug:
Click the Drug Name column of an empty row
Type the drug name, select from the drop-down.

Directions: Enter Dose, Units Basis (mg/m2, AUC, dose, kg), Route, Daily Frequency (always x1).

Schedule: Click in the schedule area, click the ellipsis
A window opens to select the number of days.
Always click the 1. It will turn red.
Click Done
Before queueing or signing the order:

1. Open the Drugs – Miscellaneous tab

2. In the Misc Admin Instructions area, enter any additional instructions. All PRN orders must include “indication for use”

3. Click the ‘Show on Flowchart’ column. If this is not checked, the drug will not display on the flowsheet.

This information prints on the order and/or the eNurse documentation fields.

The name of all added orders is “Additional Order” and the date. Always edit the order name. Select the order.

Then click the Rename button.

Additional Drug Order

Click in the New Name field. Enter the drug, dose and route

Click :Change name of only the the current order set

Click OK

Order status is **Next**. Sign order to change to **Pending** status for nursing to process order.

Non-Drug Order

Click in the New Name field. Enter the order

Click :Change name of only the the current order set

Click OK

Order status is **Next**. Sign order to change to **Pending** status for nursing to process order.
Sliding of Order Dates

Patient's received May 28th treatment but is unable to return for D4 treatment on Monday June 2nd.
The Physician wants to allow the patient to come on Tuesday June 3rd instead.

**Single click** on Order in 'Executed' status and then single click on treatment calendar icon

Treatment Calendar opens
**Single click** on D4, June 2nd that is to be slid (will turn dark blue) then **single click** on black arrow (pointing to the right) to move date to Tuesday June 3rd

**Single click** on 'Continue' to complete date slide.
To confirm that date slid correctly, you may single click on the calendar icon again to view.
Restart of Order Dates

Patient's order was originally written for May 28th. The Physician needs to move treatment date to May 30th.

Single click on Order in 'Pending' status and then single click on treatment calendar icon.

Treatment Calendar opens

2. Single click on day 1 of treatment and day (will turn dark blue). Then single click on desired treatment date (desired date will turn dark blue).

3. Mark as outpatient or inpatient then single click on 'Reset Start Date' then click on 'Continue'.

4. Treatment Start Date changes to May 30th (highlighted in blue).

5. Single click on 'Continue' to finalize change of order date.
Splitting an Order Going Forward

Scenario: Patient has a multiple treatment order set such as the (d1,8,15,22) plan below. Patient received d1 and d8 of the order as written but the physician needs to make a change to the d15 and d22 portion of the order.

Highlight order in 'Executed' status and single click on the Change Going Forward button.

In the calendar, mark the split day by single clicking on (d15) and single clicking on the 'Mark Split Day' button.
Split day turns red. Click on 'Continue'

Order now appears in order grid as split. The original order will now show as d1-14 and the second order will appear as d15-28.

To update the treatment days in the order titles, single click on the order in the 'Executed' status and single click on the 'ABCD' icon. The Rename window will appear with the treatment plan name already entered in the box. Remove d15,22 from the title and enter Day 1 and 8 only. Under 'Mode' mark to change name of only the current order set and click 'OK'

Single click on 'Split' order in 'Next' Status and then single click on ABCD icon. The Rename window will appear with the treatment plan name already entered in the box. Revise to Day 15 and 22 only. Under 'Mode' mark to change name of only the current order set and click 'OK'
Double click on the order in the 'Next' status. The recent dosing window opens with the most recent drugs and doses ordered. 

1. **Check off 'Use dosing'** on each drug to mark individual drugs/dosages. Click 'Select All', or Click 'Select None' and 'Continue'. If you do not make any choices and just click on continue it will include all.

The **calendar screen** opens. If you wish to **change the patient's treatment date** you may do so at this time by single clicking on the day to be moved and using the arrows on the bottom of the window to move to the day to the desired treatment date. Mark as 'Inpatient' or 'Outpatient' and click 'Continue'.

You may also **reset start date** by single clicking on first date of treatment on the calendar (will turn dark blue) then single clicking on the desired start date (will turn dark blue) then marking as 'Inpatient' or 'Outpatient' then clicking on 'Reset Start Date'.
Order Dates will shift to desired dates then single **Click on 'Continue'**

Order will open to drug grid. **Prepare and sign order**
Accepting a Revised Treatment Plan

Patient has a prior executed order for the treatment plan of Test, Abraxane

Subsequently a change or edit is made to the treatment plan template. When you open the order in 'Next' Status to prepare, you will receive a 'Template Revision Warning'

Single click on 'View Revisions' and the Revision Description window will appear outlining all changes that have been made to the treatment plan template since it was developed. Click 'Close'

Single click on 'Yes' to accept the revisions and you will receive a confirmation window. Single click 'Yes' to confirm acceptance of revisions. Order opens to be prepared.

Single click on 'No' and you will be returned to the order grid.

Double click on the order in the 'Next' status again to prepare order and you are given a choice of copying previous orders or using the original template

Single click on the 'Use Original Template' and a window that includes the medications on the original template with most recent order dosing will appear.

If you do not make any choices and click 'Continue' it will populate the order with all of these drugs and dosages.
Single click on 'Copy Previous Orders' and it will show prior orders in the first section that you can choose to copy from, just highlight and single click on 'select'. The bottom window will show you the drugs and doses in the selected order to be copied.

Calendar opens. Make any necessary date changes, mark as 'Inpatient' or 'Outpatient' and click 'Continue'

Order opens to prepare and sign