

Preference Lists

(updated 5/7/2015)

Try It Out

Preference Lists are a function of Epic Used to help facilitate ordering of clinical services. These will be most convenient for the following situations:

- Studies with very complicated orders and/or complicated protocol timelines.
- Studies that have multiple staff members entering orders.

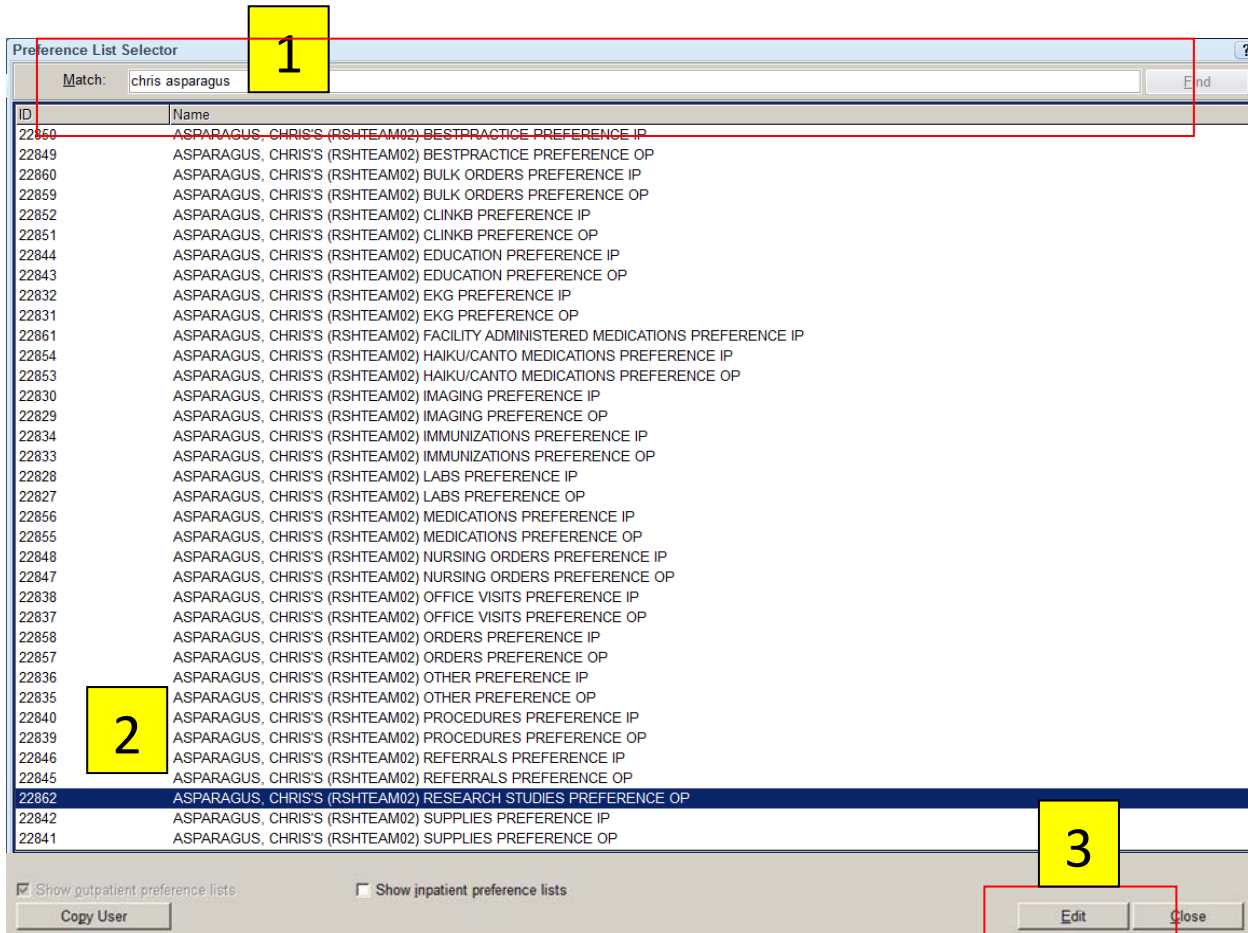
1. From your Dashboard select **Preference List Composer**. (Bottom right of screen)

You will now be in the **Preference List Selector**.

2. In the Match field search for your own name and hit enter or select **Find**. (1)

3. Select the Preference List **Your name (user ID) RESEARCH STUDIES PREFERENCE OP**. (2)

4. Select **Edit**.



Preference List Selector

Match: chris asparagus 1 End

ID	Name
22850	ASPARAGUS, CHRIS'S (RSHTeam02) BESTPRACTICE PREFERENCE IP
22849	ASPARAGUS, CHRIS'S (RSHTeam02) BESTPRACTICE PREFERENCE OP
22860	ASPARAGUS, CHRIS'S (RSHTeam02) BULK ORDERS PREFERENCE IP
22859	ASPARAGUS, CHRIS'S (RSHTeam02) BULK ORDERS PREFERENCE OP
22852	ASPARAGUS, CHRIS'S (RSHTeam02) CLINKB PREFERENCE IP
22851	ASPARAGUS, CHRIS'S (RSHTeam02) CLINKB PREFERENCE OP
22844	ASPARAGUS, CHRIS'S (RSHTeam02) EDUCATION PREFERENCE IP
22843	ASPARAGUS, CHRIS'S (RSHTeam02) EDUCATION PREFERENCE OP
22832	ASPARAGUS, CHRIS'S (RSHTeam02) EKG PREFERENCE IP
22831	ASPARAGUS, CHRIS'S (RSHTeam02) EKG PREFERENCE OP
22861	ASPARAGUS, CHRIS'S (RSHTeam02) FACILITY ADMINISTERED MEDICATIONS PREFERENCE IP
22854	ASPARAGUS, CHRIS'S (RSHTeam02) HAIKU/CANTO MEDICATIONS PREFERENCE IP
22853	ASPARAGUS, CHRIS'S (RSHTeam02) HAIKU/CANTO MEDICATIONS PREFERENCE OP
22830	ASPARAGUS, CHRIS'S (RSHTeam02) IMAGING PREFERENCE IP
22829	ASPARAGUS, CHRIS'S (RSHTeam02) IMAGING PREFERENCE OP
22834	ASPARAGUS, CHRIS'S (RSHTeam02) IMMUNIZATIONS PREFERENCE IP
22833	ASPARAGUS, CHRIS'S (RSHTeam02) IMMUNIZATIONS PREFERENCE OP
22828	ASPARAGUS, CHRIS'S (RSHTeam02) LABS PREFERENCE IP
22827	ASPARAGUS, CHRIS'S (RSHTeam02) LABS PREFERENCE OP
22856	ASPARAGUS, CHRIS'S (RSHTeam02) MEDICATIONS PREFERENCE IP
22855	ASPARAGUS, CHRIS'S (RSHTeam02) MEDICATIONS PREFERENCE OP
22848	ASPARAGUS, CHRIS'S (RSHTeam02) NURSING ORDERS PREFERENCE IP
22847	ASPARAGUS, CHRIS'S (RSHTeam02) NURSING ORDERS PREFERENCE OP
22838	ASPARAGUS, CHRIS'S (RSHTeam02) OFFICE VISITS PREFERENCE IP
22837	ASPARAGUS, CHRIS'S (RSHTeam02) OFFICE VISITS PREFERENCE OP
22858	ASPARAGUS, CHRIS'S (RSHTeam02) ORDERS PREFERENCE IP
22857	ASPARAGUS, CHRIS'S (RSHTeam02) ORDERS PREFERENCE OP
22836	ASPARAGUS, CHRIS'S (RSHTeam02) OTHER PREFERENCE IP
22835	ASPARAGUS, CHRIS'S (RSHTeam02) OTHER PREFERENCE OP
22840	ASPARAGUS, CHRIS'S (RSHTeam02) PROCEDURES PREFERENCE IP
22839	ASPARAGUS, CHRIS'S (RSHTeam02) PROCEDURES PREFERENCE OP
22846	ASPARAGUS, CHRIS'S (RSHTeam02) REFERRALS PREFERENCE IP
22845	ASPARAGUS, CHRIS'S (RSHTeam02) REFERRALS PREFERENCE OP
22862	ASPARAGUS, CHRIS'S (RSHTeam02) RESEARCH STUDIES PREFERENCE OP
22842	ASPARAGUS, CHRIS'S (RSHTeam02) SUPPLIES PREFERENCE IP
22841	ASPARAGUS, CHRIS'S (RSHTeam02) SUPPLIES PREFERENCE OP

2

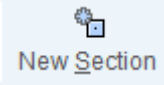
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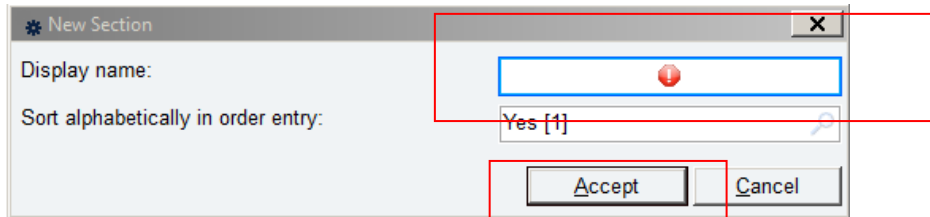
Show outpatient preference lists Show inpatient preference lists

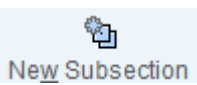
Copy User Edit Close

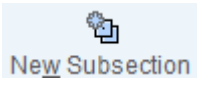
You will now be in the **Preference List Composer**.

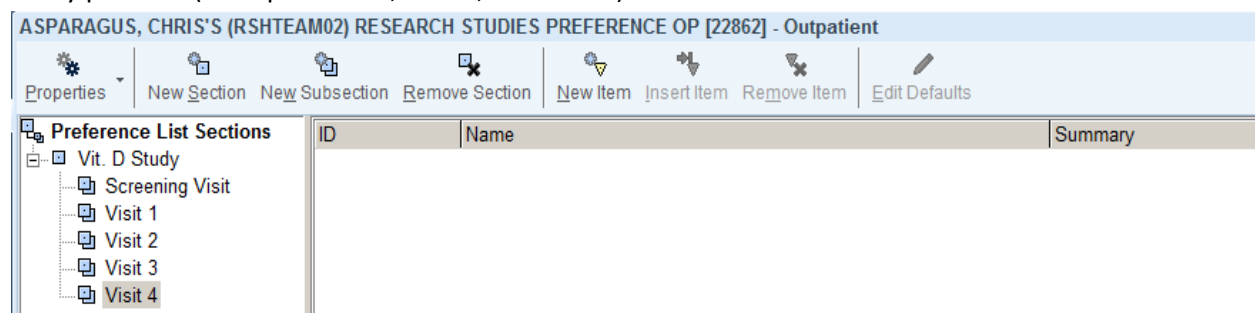
From here you will build your studies preference list.

1. Select  **New Section**
 - a. This will open the New Section screen. In the **Display** field enter the study name and select **Accept**.



2. Select  **New Subsection** to create the first encounter or visit for your study.
 - a. This will open the New Subsection screen. In the **Display** field create a name for this first encounter. (example: Screening visit)

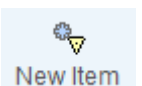
3. If you now re-highlight the original Section (Study Name) and select  **New Subsection** again you will create the second encounter for your study.
 - a. This will again open the New Subsection screen. In the **Display** field create a name for this second encounter. (example: Visit 1)
4. You can continue steps 6 and 7 giving all your new subsections new names that are appropriate for your study protocol (example: Visit 2, Visit 3, and Visit 4)



Note: If you create a subsection under another subsection by mistake you can click and drag the subsection (visit) and place it under the section (Study Name).

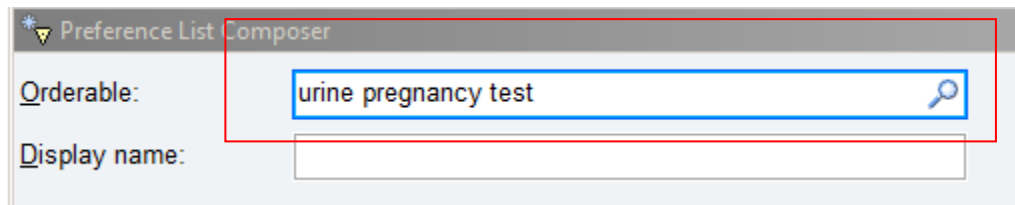
Now that the section (study) and subsections (visits) are set up, new items (order preferences) are placed in the respective visits.

1. Select to highlight the subsection (visit) you would like to put an order preference into and

select  **New Item**.

2. This will open the Preference List Composer for orderable items.

- a. In the **Orderable** field type in the order needed for that visit and click the magnifying glass to search for that item.

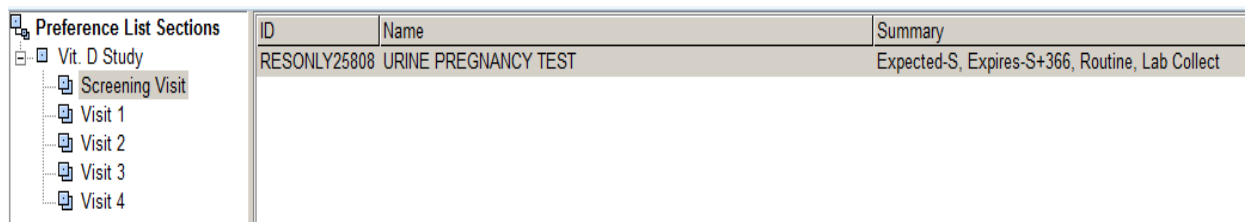


Preference List Composer

Orderable:

Display name:

- a. Select the specific order needed and select **Accept**.
- b. On the next screen ensure this is how the order should be set up on the preference list and select **Accept**.
- c. You will now see the selected order in the subsection of the study.



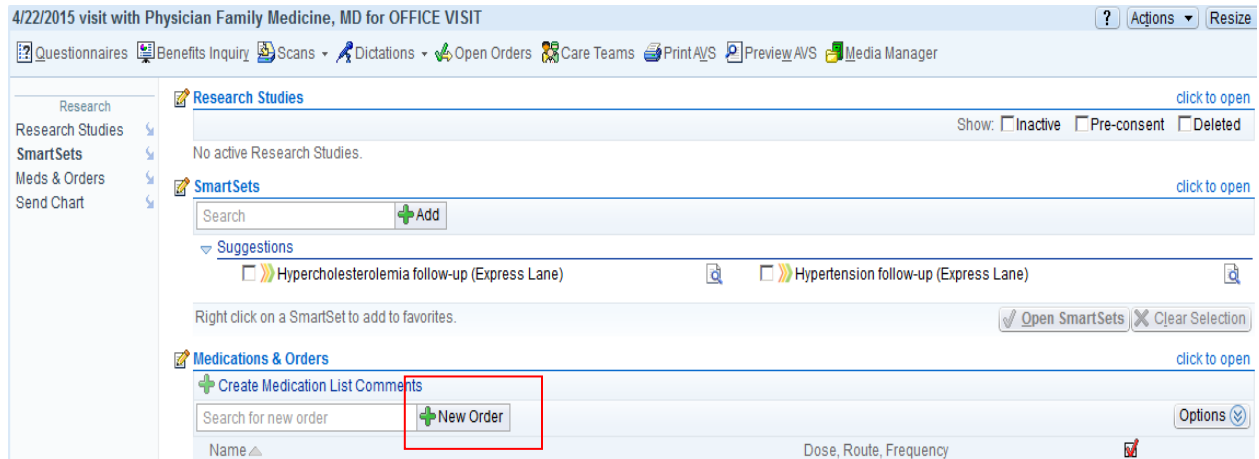
ID	Name	Summary
RESONLY25808	URINE PREGNANCY TEST	Expected-S, Expires-S+366, Routine, Lab Collect

3. Repeat steps 1 and 2 to enter all preferred orders into all other subsections (Visits).

After the preference list is completed in the Preference List Composer exit out of the Preference List Composer. (Your preference list will automatically save)

The preference list will now be available when placing an order for a subject.

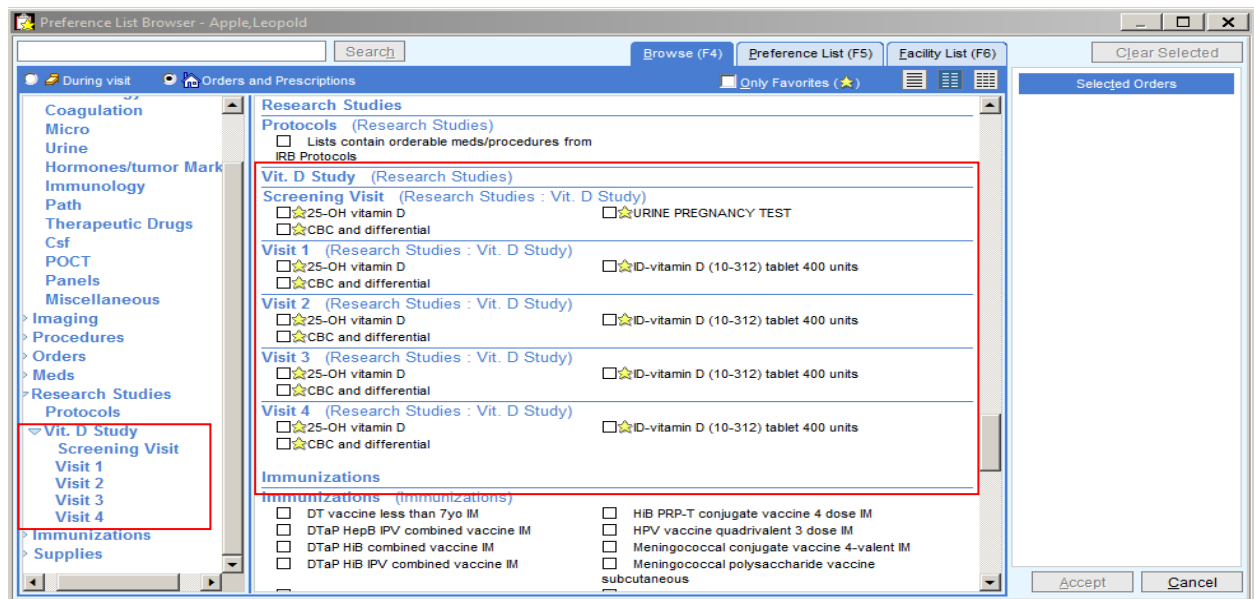
1. While in the subjects encounter select 



This will open the **Preference List Browser** where orders can be searched and selected.

To find the preference list that was just created

1. In the navigator on left select **Research Studies**
2. There will be a drop down showing the study you created in the Preference List Composer.
3. You will then see your visits and preferred orders for each visit that was set up in the Preference List Composer. You can now select these orders from this list.



Within the Preference List Composer users are able to share (push and pull) their preference lists with other members of the study. There are 2 different ways to share preference lists.

1. **Push** your preference list onto another user's preference list
2. **Pull** a preference from another user onto your preference list

To share preference lists use the following steps:

1. From your dashboard open the **Preference List Composer**
2. Select **Copy User**. (This will be at the bottom left of the screen)
3. This will open the PrefList Copy User screen. You will notice your name defaults to the **To user:** field. This is done purposefully because you should typically pull preference lists to yourself rather than push yours onto others.
 - a. If you are in the **To user** field then you will pull a preference list to yourself
 - b. If you are in the **From user** field then you will push your preference list to another person.
4. In the **From User:** field enter the username you would like to pull the preference list from. (1)

PrefList Copy User

Select Users and Ordering Mode

From user:

To user: ASPARAGUS, CHRIS [RSHTeam02]

Ordering mode: Both

Copy Option

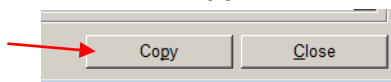
Merge

Replace

5. In the **Copy Option** box you will notice **Merge** is selected. This will allow you to merge the preference lists rather than replace the preference lists. (2)
 - a. **Merge:** This will add the pushed or pulled list onto the users previous lists
 - b. **Replace:** This will replace and erase any previous preference lists and replace them with the new pushed or pulled preference list. (This should NEVER be used as it will erase any previous preference lists made by the user)
6. In the **Select Preference List Types** scroll down and select box next to **Research Studies (Outpatient)** this indicates that you would like to pull all of the Research Studies (Outpatient) preference lists from the 'From user'.

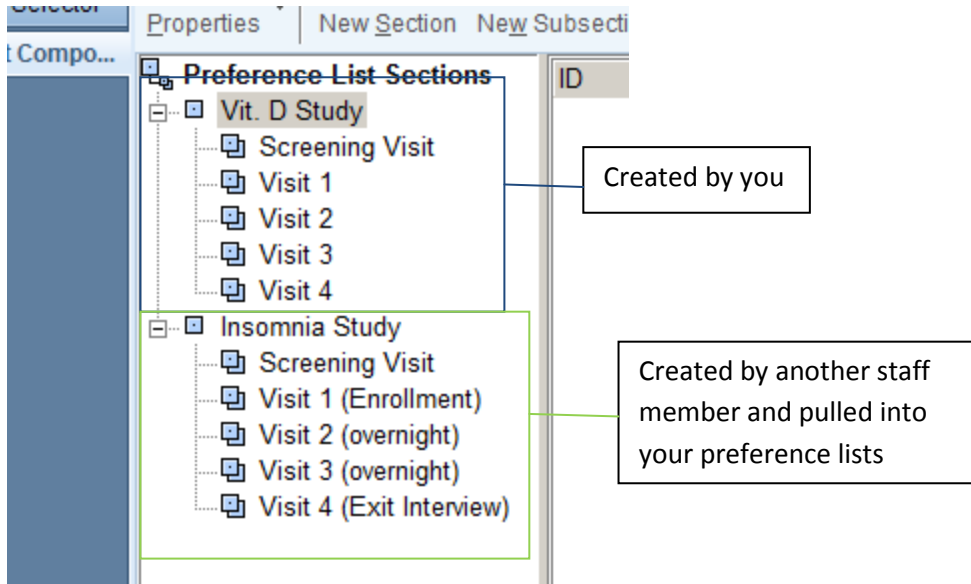
<input type="checkbox"/>	Facility Administered Medications	0	0
<input checked="" type="checkbox"/>	Research Studies (Outpatient)	17	15

7. Now select **Copy**.



You will see a pop up stating Copy Complete. You can now close the PrefList Copy User screen.

If you now go into the Preference List Selector and find your preference list, **Your name (user ID) RESEARCH STUDIES PREFERENCE OP**, and select **Edit** you will notice the new preference list you just pulled in and merged with yours.



Both these preference lists will now be available when placing an order for a subject.

