

**Department of Medicine  
Refresher Tips**

**EPIC Training: So Many Clicks, So Little Time**

**Placing Orders and  
Using Preference Lists**

Patrick Sweeney

Training Session

2/9/22

*These materials were provided by Epic Systems Corporation.*

*The Epic Training: So Many Clicks, So Little Time  
Program is sponsored by the Department of Medicine  
Well-Being Team and the Clinical Advisory Council.*

# Top Efficiency Tips

- Orders.....3**
- Edit multiple orders at the same time ..... 3
- Add orders to your Preference List as you place them ..... 3
- Browse your Preference List to find orders.....4
- Send prescriptions to different pharmacies ..... 4
- Other Tips..... 5

# Orders

## Edit multiple orders at the same time

After entering multiple orders, you might want to make the same change to several of them, like updating the status, class, resulting agency, or interval. To speed things up, edit them at the same time instead of individually. For example, mark a set of related lab orders as Standing and give them an interval of every 12 weeks. Or, quickly change the class to indicate that all the labs will be done at an external lab.

1. In the Visit Taskbar, enter several lab orders and click **Edit Multiple** in the shopping cart.
2. In the Edit Multiple window, click **Select All** to quickly select all of your orders. If you also entered medications, select the **Procedures** check box instead.
3. If necessary, clear the check boxes for any orders you don't need to edit.
4. Edit the details of the orders on the right side of the window.
  - For example, enter "External" as the class, "Standing" as the status, "Every 12 weeks" as the interval, "3" as the count, and "m+9" as the expiration date.
  - When changing multiple orders to be Standing or Future, you don't need to update details like the count and expiration date if the defaults in the individual orders are appropriate.
5. Click **Accept** to apply these values to each of the labs you selected and return to the shoppingcart.
6. If you're done placing orders, click **Sign**.

## Add orders to your Preference List as you place them


1. Search for and select an order as you normally would. Then edit the order details and click **Accept**.
2. Before signing your order, click to add it to your preference list.


3. In the Add To Preference List window, enter any other details you want to use when you place this order in the future, such as instructions or answers to questions, and click **Accept**. Remember that these details appear only for you, and you can always update them later.
  - a. In the **Display name** field, enter an easy-to-remember name for the order. The next time you need to place this order, you can search for your saved order using this name.
  - b. In the **Section** field, enter the section of your preference list in which you want this order to appear. Or, click **New Section** to add another section to your list.



Consider adding the same order to your preference list more than once with different display names and order details. For example, you might have one entry called "Cipro UTI 3 days" for Ciprofloxacin UTI with a dose of 250 mg Q12h x 3 days and another called "Cipro Sinus 5 days" for Ciprofloxacin sinusitis with a dose of 500 mg Q12h x 10 days.

## Browse your Preference List to find orders

After you have set up your preference list, you can speed up ordering by clicking  in the Visit Taskbar and selecting the orders you need from the list.



1. To see only your personal preference list entries, select the **Only Favorites** check box at the top left of the **Browse** tab.
2. Select the orders you want to place and click  **Accept**.

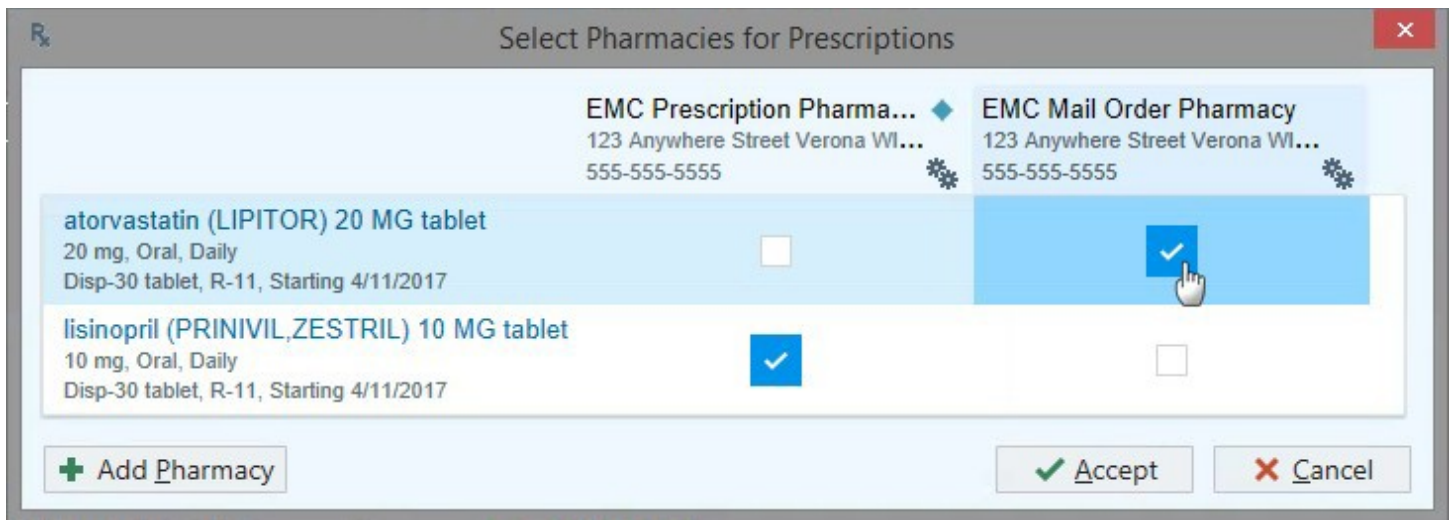


To edit the details of an order on your personal preference list, right-click the order in the Preference List Browser.

## Send prescriptions to different pharmacies

If one or more prescriptions needs to go to a specialty or mail order pharmacy, you can choose which prescriptions go to which pharmacies.

1. After queuing up your orders, click the pharmacy link in the shopping cart.
2. Search for another pharmacy and click the star to mark it as a preferred pharmacy.
3. Click  **Send to Multiple Pharmacies** at the bottom of the Pharmacy Search window.
4. Select the appropriate check boxes to associate each prescription with a specific pharmacy, then click  **Accept**.



## Other Tips:

[UserWeb Sign-on Help \(epic.com\)](#) – Sign on help

[Power Bites: Ambulatory Orders - weLearning \(epic.com\)](#)