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Introduction

Use therapy plans to set up flexible, one-time, or ongoing, non-chemotherapy care that will be administered in a Trinity Health **outpatient** infusion center. Examples include hydration, Rituxan, Vitamin B-12, Venofer, Entyvio, Xolair, Infliximab, Stelara, etc. In addition, blood transfusions administered in a Trinity Health **outpatient** infusion center are ordered using a transfusion therapy plan.

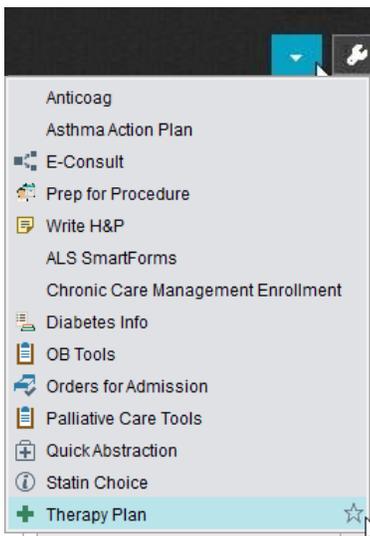


Inpatient Providers who will **not** be following patients once discharged should coordinate with the patient's Outpatient Provider to enter orders using a Therapy Plan.

Inpatient Providers who will be following the patient once discharged should enter infusion orders using a Therapy Plan.

Access the Therapy Plan Activity

Oncology providers access Therapy Plans in the Treatment activity. Non-oncology providers access Therapy Plans from the "More" menu in the upper right within the patient chart.



Select **+ Therapy Plan star** to save as a favorite.

- Episodes are organized by specialty. Examples include General Medicine, Dermatology, Infectious Disease, and Rheumatology.
- A patient can have only one therapy plan assigned per episode. If additional plans are required, use the Add'l Therapy Plan episode type.

Select Therapy Plan Protocol

From the Therapy Plan Activity, search for the plan using your specialty episode type. Select a protocol and modify orders to meet the needs of the patient.

Scenario: I am a Neurologist and my patient needs Soliris.

1. Select Neuro Therapy Plan from the table of contents.
2. Select Available to view the Therapy Plans available for me.

- Preview the plan by clicking the paper and magnifying glass
 - Favorite the plan by selecting the star. This will create a favorites list at the top to save you time in the future.
3. Select Eculizumab (Soliris).
 4. Complete required stop signs; start date, lead provider (physician responsible for the ongoing treatment) and treatment department.
- NOTE:** APP's and Residents can order the plan but can't be listed as the lead provider.
- NOTE:** Treatment department is the Trinity Health outpatient infusion center where the patient will receive their treatment.
5. Associate the plan with a diagnosis and assign it to the patient.

View the Therapy Plan

The orders are sorted by order categories, such as Appointment Requests, Provider Communication, Treatment Parameters, Nursing Orders, etc. You can also see the following:

- The plan's authorization status.

Icon	Authorization Status
	Authorized
	Declined
	Still pending review

Modify the Therapy Plan

On the Edit Plan tab, you can edit existing orders, add new ones, or remove orders.

- To modify an existing order, click its Summary Sentence to open the Order Composer.
- To add a new order, search for the order and double-click to open the Order Composer.
- To remove an order, click ✕ .

	The Order Schedule fields are unique to therapy plan orders and are used to determine when a patient should receive treatment. See the table below for information about the Order Schedule and Order Details sections.
---	---

sodium chloride 0.9 % flush 3 mL

Order Schedule Which treatment days need this order?

Group with protocol: BMT ALLO Q7DAYS

Category: Pre-Medications

Interval: Weekly **Weekly: Mon**

Every 1 weeks on:

Specific days: Sun Mon Tue Wed Thu Fri Sat

Any day times a week

Minimum separation: days

Next due: 4/3/2017

Duration: Until discontinued

treatments

Until

Order Details How should the order be given on those days?

Use the Order Schedule (interval) section to determine...	Use the Order Details (frequency) section to determine...
When an order will be due, like the first Monday of each month.	How an order will be given when it is released on the day of treatment.
How often across multiple visits a patient receives treatment.	How many times an order is carried out when the patient arrives for treatment.
A category for orders. The Category field categorizes orders with a similar purpose so they're easy to find.	

To change the interval after an order has been signed, click [Edit Interval](#).

When adding labs to a Therapy Plan, be sure to choose the outpatient (house icon) order. Labs that will be resultated outside of Trinity Health should not be added to the plans. In addition, the intervals of "Every Visit", "PRN" and "Selected Treatments" should not be used within the Therapy Plan. Lab orders utilizing these intervals will be dependent on "Begin Treatment #" and release for users to complete the specimen collection workflow.

Schedule Therapy Treatment Days

Treatment days can be requested from the Therapy Plan as schedulable orders. When these orders are signed, they go directly to the scheduling queue.

Schedulable orders are included in pre-built protocols. Review the frequency and interval of the order as you would review other orders in the plan.

At any time, you can hover over the scheduling request within the therapy plan to see more details about the request, including if the order has been scheduled.

Change Scheduled Treatment Days

If you need to change an appointment request, edit the order and sign. Any edits will automatically be sent to the scheduler to modify the appointment request.

Sign Therapy Plan Orders

1. Complete stop signs which are required fields.
2. Click **Select Unsigned** and uncheck any orders you don't want to sign.
3. Sign the orders.
4. Associate the orders with a diagnosis.



You can also sign orders individually by clicking [Sign](#) to the right of the order.

Discontinue a Therapy Plan

1. In the therapy plan, select  **Discontinue Plan** from the **Actions** menu.
2. Enter a reason for discontinuing the plan.

Add Multiple Therapy Plans under one Plan

Patients can have only one active therapy plan per Therapy Plan episode. An additional therapy plan can be added to the existing plan, as long as a single provider is the Lead provider.

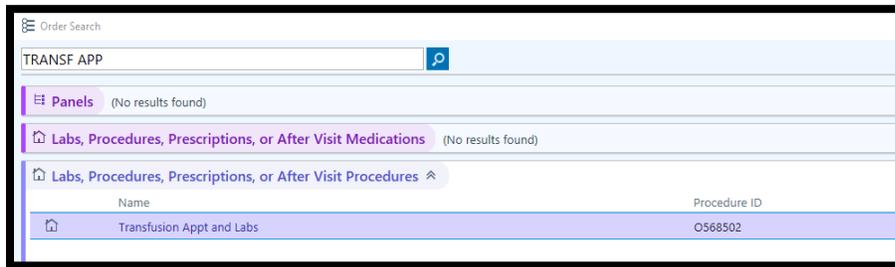
1. In the therapy plan, select **Add Protocol** from the **Actions** menu.
2. Select the therapy plan to be added.
3. At the **Group with Protocol** prompt, leave the field as defaulted.
4. Sign the orders.

Blood Transfusion Therapy Plan

Use the Transfusion Therapy Plan to order blood-product transfusions for the outpatient setting (one-time or recurring).

Schedule Transfusion Treatment Appointments and Labs

1. Appointment requests for transfusion and blood bank lab orders can be ordered from a panel available on the department preference list. These orders go to the scheduling queue and lab queue when signed.



The Transfusion Therapy Plans include optional transfusion appointment request and lab orders.

- If using the Outpatient Transfusion (ONCE) plan, the interval is appropriate at "ONCE".
- If using the Outpatient Transfusion (PRN) or the Outpatient Exchange/Transfusion plans, the default interval is set to "Once" and should be updated to an interval that is appropriate for the patient. Do **NOT** use an interval of "PRN" or "Every Visit", as orders will not be sent to the appropriate workqueue.

The recommendation is to use the Order Panel to place orders for the Transfusion Appointment and Labs within the PRN Transfusion Therapy Plans.

Select a Transfusion Therapy Plan

To create a transfusion therapy plan, select a plan and modify the orders to create a plan that fits the needs of the patient.

2. In the Therapy Plan navigator, search for the plan under the Transfusion Therapy Plan episode type.
3. Double-click the plan name to set properties, such as a start date and lead provider or to preview the plan.
4. Associate the plan with a diagnosis on the Problems tab and assign it to the patient.
5. Modify orders as needed.

Sign Therapy Plan Orders

6. Click Select Unsigned and uncheck any orders you don't want to sign.
7. Sign the orders.
8. Associate the orders with a diagnosis.

Therapy Plan Review

Some Therapy Plans have a Review Scheme set that will require review after a specified number of days. For example, Zometa with a frequency of once, will require review at 28 days and will be considered a late review if not reviewed after 56 days. Other examples of Therapy Plans with a Review Scheme include Venofer, Feraheme and Reclast.

Providers, Pharmacists, or Nurses will receive an In Basket message in the recurring treatment folder when a therapy plan needs to be reviewed or resigned. The background process will search in the order of Lead Provider -> Last Reviewer -> Plan Creator.

i

Nurses are unable to “Review” Therapy Plans and should:

1. Forward the In Basket message to the provider or pharmacist for their review.
2. Discontinue Plan and, if appropriate, apply a new plan with updated orders.

Try It Out

1. Within In Basket, select the Recurring Treatments folder, review the message.

✉ **Message**

The review for this plan expired or will expire soon. Either mark the plan reviewed or click Discontinue Plan.

To review the therapy plan:

1. Click the Open Plan button.
2. Navigate to the therapy plan section's Edit Plan tab.
3. Click the Review Plan button.

2. Review the Review Information message.

📄 **FERUMOXYTOL (FERAHEME)**

Treatment Start Date	Most Recent Treatment	Lead Provider	Treatment Department	Status	Auth Status
11/3/2020	Treatment 2: 11/9/2020	Kathleen Beekman, MD	St Joseph Mercy Chelsea Infusion Center	Active	✔

Protocol
FERUMOXYTOL (FERAHEME) - As of 11/3/2020 11:23 AM

Created By	Created On	Updated By	Updated On	Review Information	Expiration Information
Kathleen Beekman, MD	11/3/2020 11:23 AM	Kathleen Beekman, MD	2/7/2021 2:00 AM	Never reviewed - Review late	Signature expires after: 11/3/2021

3. Select Discontinue Plan from the toolbar, if the plan is no longer needed. Select Open Plan to review.

✔ Done
 ↶ Open Plan
 📄 Chart
 ✖ Discontinue Plan

4. Modify orders or Edit Interval if needed, click Review Plan, then enter your password.

Device: Nasar Cammila
Keep O2 Sat Above: 90%
May discontinue once symptoms resolve.

✔ **Review Plan**
Never reviewed

Clear Unsigned
✔ Sign (0)
✖ Remove (0)
Edit Interval

✔ Close

↑ Previous
↓ Next

For Therapy Plans in which the signature has expired or contains expired orders, an In Basket message will be triggered to the recurring treatment folder. **For expiring order signature**

messages, the background process will search in the order of: Order's Authorizing provider -> Lead Provider -> Last Reviewer -> Plan Creator.

Message

Some order signatures in this plan have expired or will expire soon. Review the plan and either re-sign the orders or click Discontinue Plan.

To re-sign the orders:

1. Click the Open Plan button.
2. Navigate to the therapy plan section's Edit Plan tab.
3. Click the Re-sign Orders button in the expired banner to re-sign all the expired and signed orders or select and re-sign the orders.

5. Select Re-Sign Orders.

The screenshot shows a therapy plan for INFLIXIMAB. A yellow banner titled 'Expired Signatures' contains the text: 'Order signatures are only valid for 365 days. Some orders in this plan have signatures that are no longer valid. Click the button to re-sign all signed and expired orders. Note: Orders that were never signed or that were unsigned due to changes will remain unsigned.' A button labeled 'Re-sign Orders' with a green checkmark is highlighted with a purple box.

For Therapy Plans in which medications/procedures have a set number of treatments, an In Basket message will be triggered to the recurring treatment folder when the **intended number of treatments have been completed**. An example with a set number of treatments is a onetime dose of Iron Dextran.

Message

This plan has treatment orders that are completed (no longer active).
 Discontinue Plan (re-apply and sign a new therapy plan if appropriate)
 -OR-
 To re-order the completed orders within the current therapy plan:
 1. Navigate to the therapy plan's Edit Plan tab and click.
 2. Re-order the necessary completed orders (click on Re-order for each order needed)
 3. Select orders for signature (click the box near the therapy plan name)
 4. Sign orders (click on Sign) Note: do not use the Re-sign button.

Therapy Plan Information

IRON DEXTRAN (INFED) 1000 MG IV ONCE (1 HOUR INFUSION WITH TEST DOSE)

Treatment Start Date 9/23/2020	Most Recent Treatment Treatment 1: 9/23/2020	Lead Provider Tareq Al Baghdadi, MD	Treatment Department Cancer Center Infusion Center	Status Active	Auth Status [Icon]
Protocol IRON DEXTRAN (INFED) 1000 MG IV ONCE (1 HOUR INFUSION WITH TEST DOSE) - As of 9/17/2020 12:07 PM , As of today					
Created By Tareq Al Baghdadi, MD	Created On 9/17/2020 12:07 PM	Updated By SYSTEMGENERATED, DOCUMENTATION	Updated On 9/25/2020 11:13 PM	Expiration Information Signature expires after: 9/23/2021	

Note: When reordering MEDICATION or PROCEDURE (phlebotomy) orders, do NOT set INTERVAL to PRN. The interval must be finite, such as WEEKLY.

The FREQUENCY PRN may be used within the order composer.

Phlebotomy therapeutic

Order Schedule Which treatment days need this order?

Group with protocol: THERAPEUTIC PHLEB...
 Category: Procedure
 Interval: Weekly
 Every 4 weeks on:
 Specific days: Sun Mon Tue Wed Thu Fri Sat
 Any day
 Minimum separation: days
 Next due:
 Duration: Until discontinued
 1 treatments
 Until

Order Details How should the order be given on those days?

Priority: Routine
 Frequency: As needed
 For:
 Starting: 5 At:
 Ending:
 Starting when released
 Comments:

Done | Open Plan | Chart | Discontinue Plan

Springboard Report | Visits/Patient Info | Meds/Problems | Vitals/Labs | My Last Note | Help

BB

Beacony Beacon
 Female, 43 y.o., 10/14/1977
 MRN: 100179831
 Phone: 734-343-4227 (H)

PCP: None
 Coverage: Blue Cross - Mi/Bcb...

Message

This plan has treatment orders that are completed (no longer active).

Discontinue Plan (Apply and sign a new therapy plan if appropriate)
 -OR-
 To reorder the completed orders within the current therapy plan:

1. Navigate to the therapy plan's EDIT PLAN tab and click.
2. Re-order the necessary completed orders (click on REORDER for each order needed)
3. Select orders for signature (click the box near the therapy plan name)
4. Sign orders (click on SIGN) Note: Do NOT use the Re-sign Orders button.

Note: When reordering MEDICATION or PROCEDURE (phlebotomy) orders, do NOT set INTERVAL to PRN. The interval must be finite, such as WEEKLY. The FREQUENCY PRN may be used within the order composer.

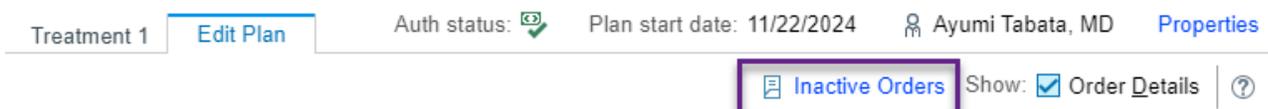
View/Reactivate/Reorder Removed and Completed Orders

To view orders within a Therapy Plan that were removed or not signed, select the Inactive Orders hyperlink.

1. Select **"Edit Plan"** within the Therapy Plan.



2. Select **Inactive Orders**.

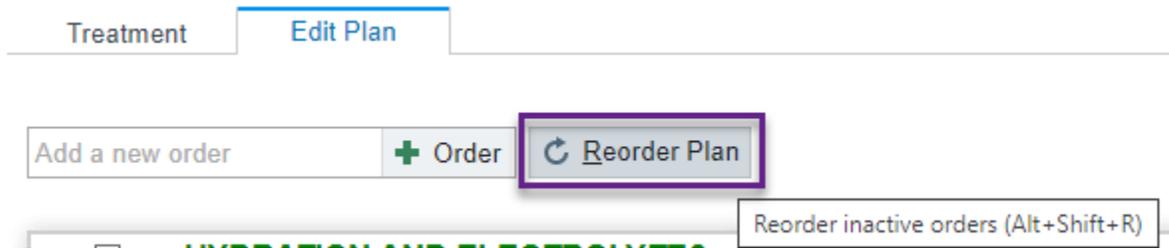


3. Orders that were removed or not signed will display.

Removed Plan Orders Orders that have been removed from the plan

Order	Removed by User	On Date
Appointment Requests		
Clinic Appointment Request	Ollie-Medonc Achilles, MD	11/22/2024 13:35
Labs		
Basic metabolic panel	Ollie-Medonc Achilles, MD	11/22/2024 13:35

4. Select Reorder Plan to quickly view and re-add orders.



5. Select the order(s) and click “Reorder Selected”.

Therapy Plan

HYDRATION AND ELECTROLYTES

Auth status: ✔ Plan start date: 11/22/2024 Ollie-Medonc Achilles, MD [Properties](#)

Order filters: Completed Removed Active | Show: Order Details (?)

Reorder Selected ✖ Cancel

Reorder Inactive Orders

Select orders to pull back into the plan, then click **Reorder Selected** to reorder them. Only orders that have been selected will be reordered. Use the order filters to show completed, removed, or active orders.

	Interval	Duration		
HYDRATION AND ELECTROLYTES				
<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <input type="checkbox"/> Appointment Requests </div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <input type="checkbox"/> Clinic Appointment Request <div style="font-size: small; margin-top: 5px;"> Due: Removed 180 minutes, Schedule appointment at most 0 days before or at most 0 days after For administration of medication ordered via a Therapy Plan. </div> </div> <div style="border: 1px solid #ccc; padding: 5px; background-color: #e3f2fd;"> <input checked="" type="checkbox"/> Labs <div style="font-size: small; margin-top: 5px;"> Due: Removed Expected: S, Expires: S+365, Clinic Collect, Blood, Venous, Blood </div> </div>			1 time a week	
	1 time a week			

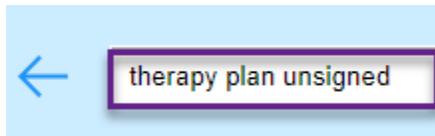
6. Click “Sign”.

The screenshot shows a 'Therapy Plan' interface for 'HYDRATION AND ELECTROLYTES'. It includes a 'Treatment' tab, an 'Edit Plan' button, and a 'Properties' link. The plan start date is 11/22/2024, and the provider is Ollie-Medonc Achilles, MD. There are buttons for 'Add a new order', 'Reorder Plan', 'Clear Unsigned', 'Sign (1)', 'Remove (1)', and 'Next'. A 'Sign (1)' button is highlighted with a purple box.

Unsigned Orders Report

Utilize the Therapy Plan unsigned report to monitor unsigned orders with a Therapy Plan.

1. Open My Reports.
2. Search for the Therapy Plan unsigned report.



3. Hover over the report and click Play to run.

The screenshot shows search results for 'My patients with unsigned therapy plan orders'. A play button is highlighted with a purple box, and a tooltip 'Run RW report' is visible. The description says 'Identify my patients on therapy plans with orders due greater than last week.' There is an 'Oncology' filter button.

4. The default Date Range is "M-1 to M+1". Select the pencil to update report settings.



5. Patients with unsigned therapy plan orders are displayed. The last column shows Signed Orders.

My patients with unsigned therapy plan orders [3603] as of Fri 11/22/2024 2:05 PM

Update Provider | Orders Only | Chart | Send Plans | Discontinue Plans | Put Plans on Hold | Release Plans from Hold

Detail List | Explore | Orders by patient | Orders by department

Filter

Patient Name/Age/Gender	Plan Name	Plan Type	Plan Status	Plan Provider	Order Name	Plan Start Date	Signed Orders
Aladdin, Natalie-OPINF (32 y.o. Female)	HYDRATION AND ELECTROLYTES	General Medicine Therapy Plan	Active	Ollie-Medonc Achilles, MD	Basic metabolic panel	11/22/2024	34/35