Requesting Research Personnel to Process Non-Medication Standing Orders in the Epic Electronic Medical Record (EMR)

The MUSC Medical Staff Rules and Regulations do not allow non-licensed, non-certified personnel, including research coordinators and administrative assistants, to take verbal orders and enter them in the medical record. This is consistent with federal regulation and regulatory agency requirements. Please see Epic Ambulatory Policy A120, reference to the MUSC Medical Center Policy Manual, for further information.

HOWEREVER, a research coordinator or administrative assistant (or other non-certified person) may copy a “nonmedication standing order” into the patient’s chart and notify the authorizing provider that has been done. This is PROCESSING, not truly “entering” ORDERS, because a standing order (like that in a research study protocol) is legally pre-authorized by the provider to apply to patients with a given symptom or condition. This order must be signed by the responsible provider in an acceptable timeframe. Non-licensed personnel cannot enter medications, even with this variance.

To obtain approval to process standing orders for EACH study into the patient’s chart in Epic:

1. Complete the “Research Personnel to Process Order in Epic Request Form”
   a. This form must be completed, signed by the licensed supervisor of the research personnel, and must include the names and roles of the research coordinator(s) or administrative assistant(s) who will be processing research orders in Epic EMR system.
   b. **All fields of the form are required.** Incomplete forms will not be considered for approval.

2. Complete the “Standing Orders Face Sheet” for the request.
   o This form must be completed, signed and dated by the licensed supervisor of the research personnel.
   a. Attach the specific standing orders that the personnel will process, preferably a screen shot of the study calendar in Epic. Alternatively, the SPARC request that can be downloaded (and is also attached to the confirmation email) when a service request is submitted in SPARC. The orders must be simple to follow and legible.
   b. The orders must be signed and dated at the bottom of each page of orders by the licensed medical provider (MD, DO, PharmD) associated with the research study. Certified electronic signatures are acceptable.
   c. **IF there are study medications listed in the orders (including SPARC request, Epic calendar, or a schedule of events) have the PI draw a line through and initial to verify coordinators are not requesting to order study medications.**
   d. The study protocol from which the orders are transcribed must first be approved by the IRB or designee prior to requesting this variance to process standing orders in Epic.

3. Attach the protocol schedule of study procedures or, if not available, the protocol’s study plan and the Epic billing calendar.
   e. The study visit calendar and the standing orders must match.
   f. If not, please provide explanation on the above form.

4. Email all documentation in a pdf format (all documents need to be upright instead of sideways) and combined in one completed packet to Dr. Oates at researchorders@musc.edu. Subject line should be addressed with [PI name_SPARCID_abbreviation of study title]. (i.e. Oates_1234_EPIC)

5. Dr. Oates will review and either approve or deny the request.
   g. If approved, the standing orders will be available in the Epic Knowledgebase per CMS requirements.
   h. If not approved, the study team will be notified of the review decision.

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Training Requirements:
1. Complete Research 200 course. The prerequisites to take this course are for coordinators to have taken Research 100, and have a protocol approved or in process to be approved as a standing order. The proficiency exam is given at the end of the class. Registration and enrollment can be completed through CATTS.
2. Epic Orders Training is an in-person training class.
3. In the Epic Orders Training, Research Personnel must demonstrate proficiency in Epic and knowledge of Standing Orders including the ability to:
   a. Locate, order and understand implications of processing in Epic the standing orders as required by the research study protocol.
   b. Locate their standing orders in Knowledge Base
4. Research Personnel must take the associated CATTS exam and achieve a passing score of 80%
   - Coordinators will be required to complete the assessment before they leave the class.
   - Print or Email a copy of the test results with name and score to researchorders@musc.edu.

Epic Research Standing Orders Privileges:
Upon successful completion of Epic Training and exam, the Epic Research Orders team will contact the Epic Users and Securities department to grant the non-certified employee the ability to process standing orders in the Epic System
Audits: The Epic team will audit by way of reports, to ensure that the standing orders are being processed appropriately. Any determination of misuse of the ordering functionality in Epic could result in termination.

For questions regarding this process, please contact the SUCCESS Center at 843-792-8300 or success@musc.edu