

# Redesigned New Orders Tab

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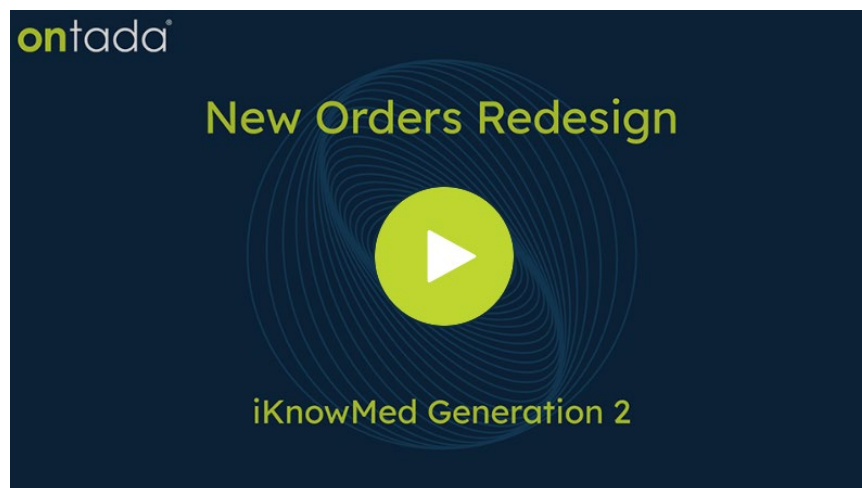
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## Overview

The New Orders tab has been redesigned to increase efficiency and improve user experience. Key updates include:

- **Improved Order Entry Workflow:** The single-order editor and overall order entry process has been streamlined to make placing orders more efficient and intuitive.
- **Customization Options:** Users can customize various aspects of the tab, including:
  - The layout of the order panels.
  - A Favorites list for frequently used orders.
  - Panels and user-defined order sets that can be changed right in the tab.
- **Prior Orders List Enhancements:** The Prior Orders list is now organized by order date and can be filtered by the ordering provider and practice location, making it easier to find past orders.
- **Maintained Trusted Functionality:** We preserved the existing functionality for adding items to the cart when configured as needed, ensuring that this familiar and reliable feature remains unchanged.



<https://videos.mckesson.com/ontada/watch/pQiGaGroYsw9tTa1GgNVbM>

# Using the redesigned New Orders tab

## Navigating to the New Orders tab

1. Open a patient chart and navigate to the current **Orders** page.
2. Select the **New Orders** tab.
3. Toggle on the **New Orders Redesign** to begin using the enhanced feature (callout 1).
4. Order reminders will continue to appear next to the **Associated Problem** field with a **bell icon** (callout 2). The reminder will be removed once an order is placed for the needed medications, labs, images, services, or supplies.
5. To watch a video highlighting the new features in the redesigned tab, click the **“?”** icon (callout 3).
6. The font on the screen can be adjusted for a smaller or larger size using the **Font size** options to control how much information appears on the screen (callout 4).
7. All order containers can be expanded or collapsed using the option at the top, right on the page (callout 5). This feature allows users to control how much content they want to see at once.

## Placing new orders

Before ordering items, please be aware that items excluded from search results in the New Orders tab by your practice will not be added to the cart.

If you attempt to add these items, a message will appear indicating that these items are unavailable due to your practice's settings. This can help prevent ordering items no longer used or supported by your practice.

### Placing a new order using Prior Orders

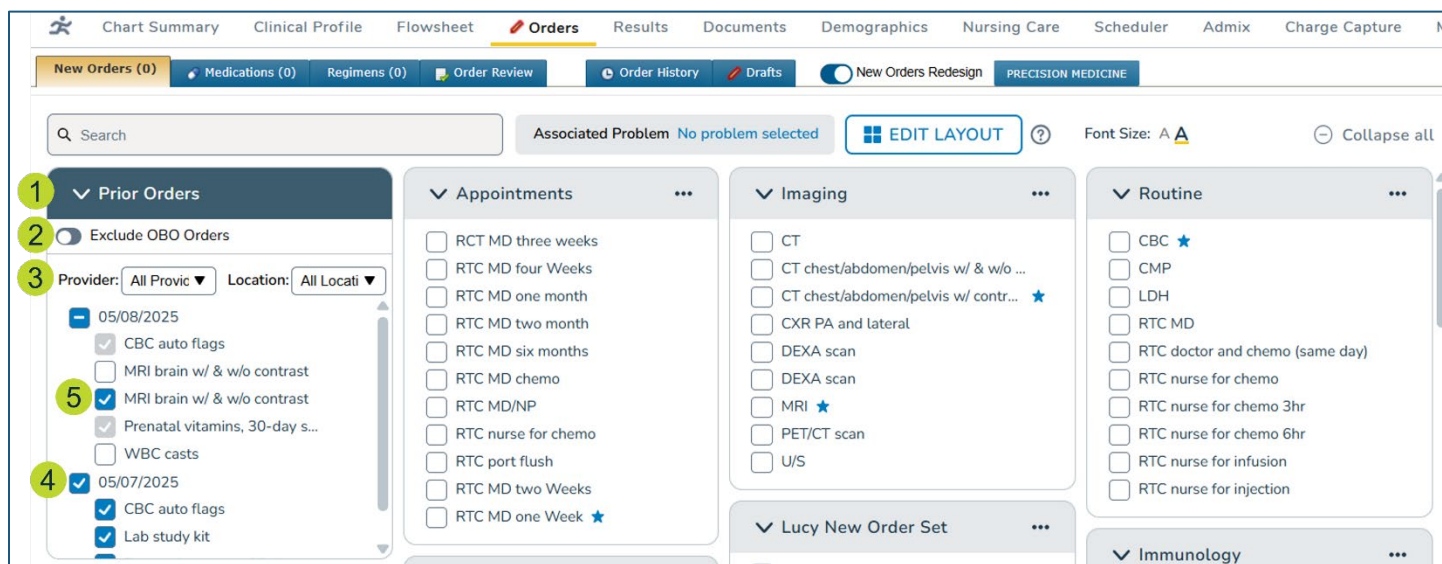
Access past orders and filter them by provider or location to quickly add them to new orders. To order from prior orders:

1. Click **Prior Orders** to expand the list (callout 1).
  - a. This list will display orders entered within the last 18 months, allowing you to efficiently add past orders to the cart without switching between screens or relying on memory.
  - b. Once you expand the list, it will remain expanded across additional charts and the system will retain this view in subsequent logins. If you prefer not to keep the list expanded, then collapse it, when finished.
2. Click the **Exclude OBO Orders** option (callout 2) to remove prior orders entered on behalf of a provider (OBO) and view only orders providers directly entered.
3. Use the filters (callout 3) to locate past orders by:
  - a. **Provider:** Select from a list of ordering providers.
    - i. Select the **My Orders** option at the top of the list to view only the orders placed by the currently logged-in provider.
    - ii. You may also search for and select one or more other providers from the list, allowing you to view and reorder items originally entered by those providers.
  - b. **Location:** Select from a list of sites where the order was last placed.
    - i. **Note for all users:** The filters you set here will apply in the New Orders tab across all patient charts. Update or remove the filters at any time to refine results.
    - ii. **Note for non-provider users:** The Provider and Location filters work the same for a non-provider as they do for a provider. When setting these filters, they will be retained going forward. Your filter selections and the displayed list of orders in Prior Orders do not change when an OBO provider is selected.
4. Click on the **order date heading checkbox** (callout 4) to select all orders listed under the date, or click the **order date heading text** to add directly to the cart. If a Default New Order

Date is configured, the item is added to the cart with the default date. If no default date is configured, users must add the order date in order details.

**NOTE:** Default order settings are a practice configuration. Questions regarding default order settings should be directed to practice administrators.

- To customize the order details before adding it to the cart, users can **check the box next to an individual order or a past ordered date** and choose to include or exclude any items in the list (callout 5).

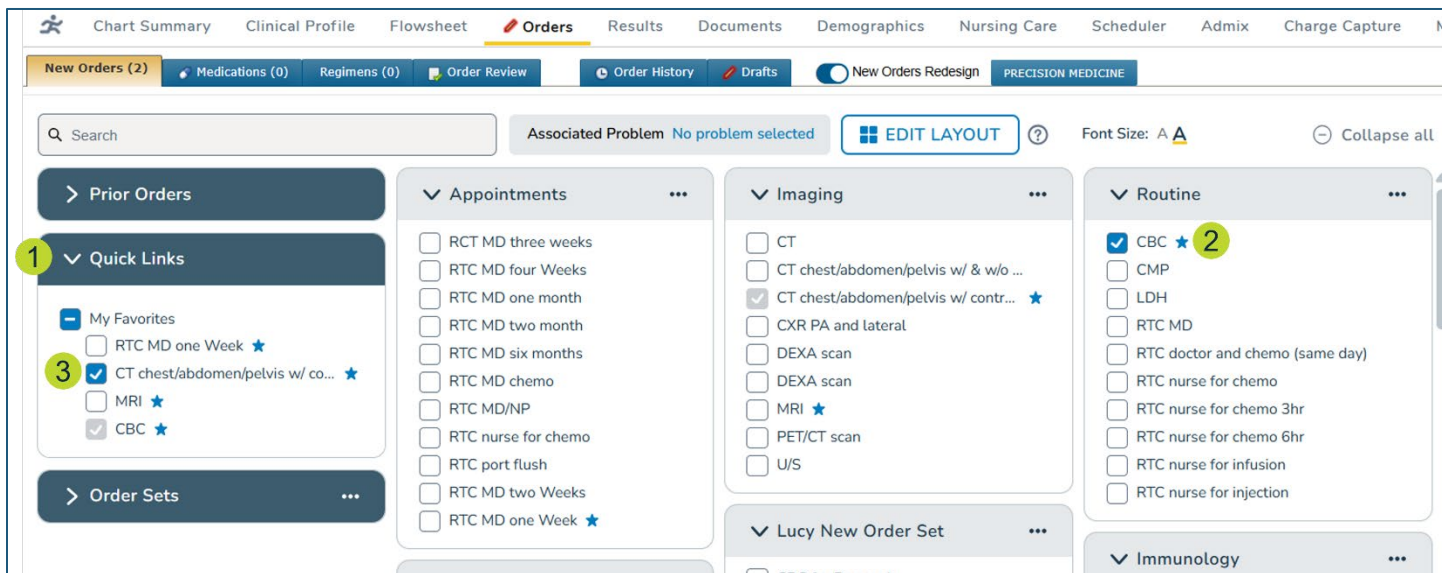


## Placing new orders using Quick Links

Easily access favorite items and quick links by starring the order where it appears in your layout.

- Click **Quick Links** to expand the list (callout 1).
  - Once you expand the list, it will remain expanded across additional charts and the system will retain this view in subsequent login sessions. If you prefer not to keep the list expanded, collapse it when finished.
- Favorite items by clicking the star next to any items in prior orders, panels, search results, order sets, etc. (callout 2).
- This will add the items to your My Favorites list in **Quick Links**.
  - Note for non-provider users:** The Favorites list the user sees is their own. It is not the selected OBO provider's favorites list. When an order is added to the list, it will continue to display in the list when viewing any patient chart. The user can order from it after the OBO provider is selected.

- When an order is configured in a panel or set with a schedule, starring that version of the order adds it to the Favorites list with the configured schedule. Click on the **order name** to add the order to the cart with the configured schedule (callout 3).
- If a Default New Order Date is configured, the item is added to the cart with the default date. If no default date is configured, users must add the order date in order details.



## Placing new orders using the Order Panels

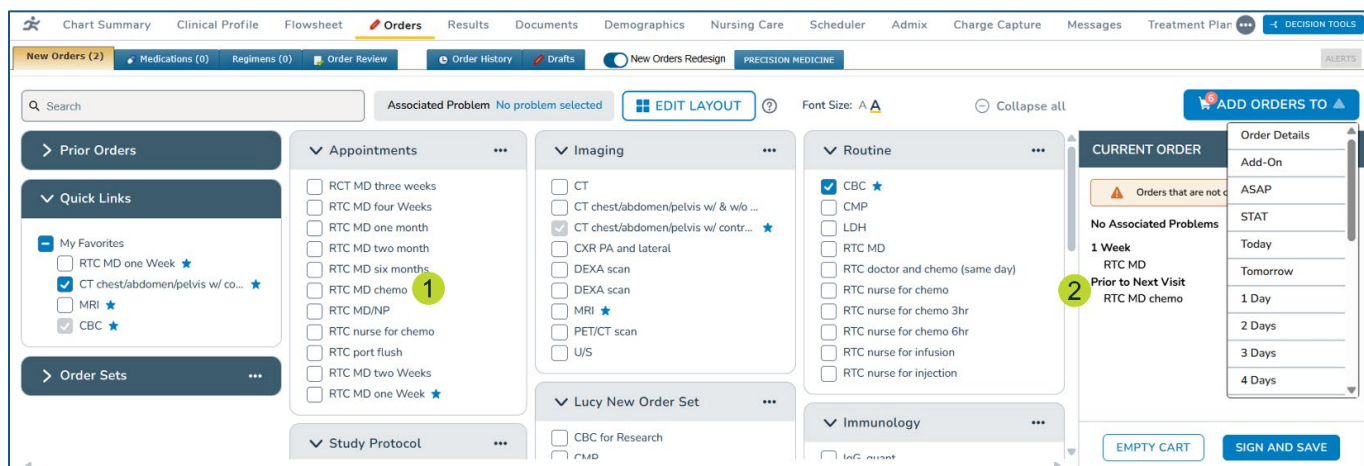
The order panels display frequently used items for faster ordering, including your assigned panels from the existing New Orders experience.

All panels can be edited and rearranged by providers for more efficient use. For more information on how to customize order panels, view the [setting and layout customizations](#) section.

To order from the order panels:

- For orders with a schedule configured in the panel, click on the **order name** to add the order to the cart with the configured schedule (callouts 1-2).

- If a Default New Order Date is configured, the item is added to the cart with the default date. If no default date is configured, users must add the order date in order details.



### Notes for non-provider users:

- After entering an OBO provider, the list of panels displayed are the ones selected by that OBO provider. The layout displays with panels collapsed or expanded based on how the provider had it set at the time you entered their name.
- The “Default On Behalf Of values” practice preference applies to the redesign the same way it applies to the existing orders tab. If the OBO is defaulted in the patient’s chart because the non-provider selected it earlier in the day, then that provider’s layout will display as of the time the non-provider last opened the chart.
- Non-provider users can expand and collapse items as needed to view panels and select orders to enter for the patient. This will not impact the provider’s saved view, preventing the need to change things back to their original state for the provider.

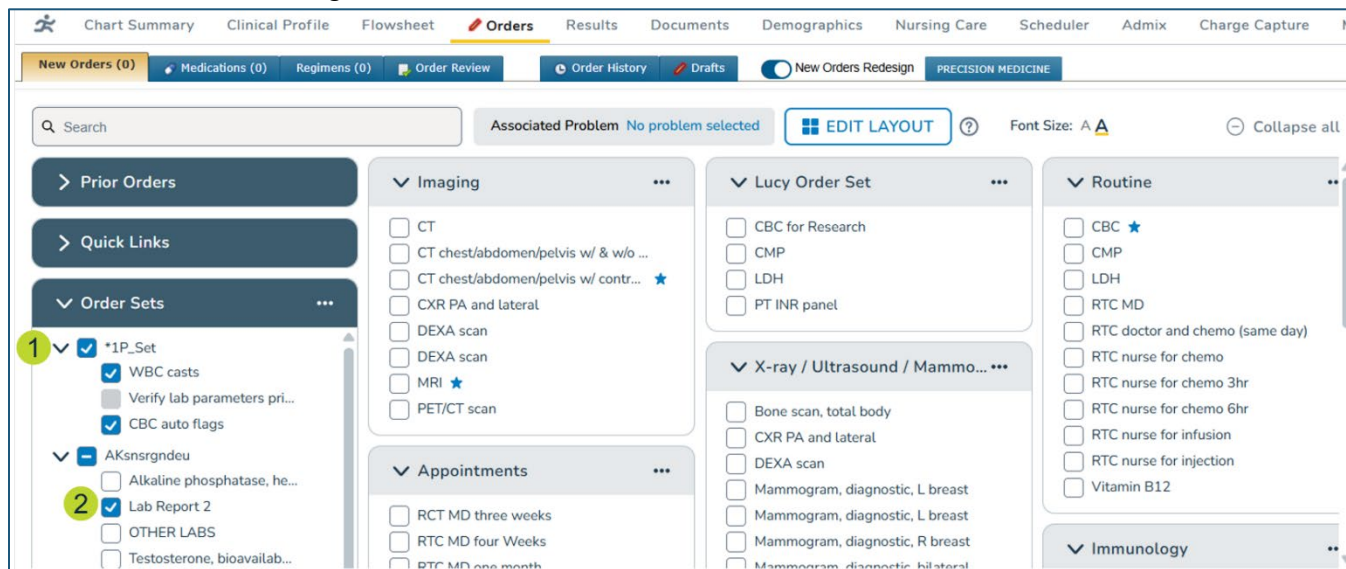
## Placing new orders using Order Sets

Easily add order sets to the order. These are the same order sets saved for your practice under [Manage > Order Sets](#).

Order sets can be customized by providers differently depending on whether they are defined by individual users or by the practice. For more information on how to customize order sets, view the [setting and layout customizations](#) section.

To order from Order Sets:

1. For orders with a schedule configured, click on **the order set or individual item** to add the order to the cart with the configured schedule (callouts 1-2).
2. If a Default New Order Date is configured, the item is added to the cart with the default date. If no default date is configured, users must add the order date in order details.



### Notes for non-provider users:

- After entering an OBO provider, the list of order sets displayed are the ones selected by that OBO provider. The layout displays with sets collapsed or expanded based on how the provider had it set at the time you entered their name.
- The “Default On Behalf Of values” practice preference applies to the redesign the same way it applies to the existing orders tab. If the OBO is defaulted in the patient’s chart because the non-provider selected it earlier in the day, then that provider’s layout will display as of the time the non-provider last opened the chart.
- Non-provider users can expand and collapse items as needed to view sets and select orders to enter for the patient. This will not impact the provider’s saved view.

## Adding order details

Once all your items are added, it's time to complete the order.

### Add required order details

1. With orders checked from the order layout, the number of selected orders is displayed on the **Add Orders To** button. Click the **Add Orders To** button to select a schedule option to apply to the selected orders (callout 1).
  - a. Select **Order Details** (callout 2) to further customize the selected orders, e.g., perform date, instructions, perform location, in the Add Order Details screen.
  - b. To add the selected orders directly to the cart without additional details, select the menu option for the desired schedule:
    - i. Add-On, ASAP, or STAT
    - ii. [Preferred schedule options \(configured in Practice and User Preferences\)](#)
    - iii. Additional menu options become available when orders are added to the cart with a custom schedule or calendar date during the order session.

2. Users selecting **Order Details** or users with the Require User to Select setting will be taken to the Add Order Details screen.
3. Review all the items in the **Order List** column (callout 3). Select all items, one item, or multiple items at a time to add the same order details.
4. Orders with instructions from the prior entry or configured in the order set or panel will display those instructions beneath the order name (callout 4).
  - a. To replace the instructions shown for orders in the list, enable the **Override Existing Instructions** option (callout 5) and complete the **Order Instructions** field.

5. Choose one of the following to set the order date (see callout 6 for example):
  - a. Add-On, ASAP, or STAT.
  - b. [One of the Preferred dates set up at the practice or patient level.](#)
  - c. A **Custom** timeframe to select a specific number of days, weeks, or months, or to create a recurring schedule for the item(s).
  - d. The **Calendar** to choose a specific time frame for the item(s).
    - i. Beneath the calendar widget is a list of the patient’s next appointments for that month, making it easier to determine the best perform date.
6. In this window, you may also change the **Associated Problems** (callout 7).
  - a. Choose one, multiple, or all displayed diagnoses to associate with the order.
  - b. If a needed diagnosis is not shown, click **Add** in the upper corner (callout 8).
  - c. This will open the Edit Patient Problem window where you can add a new Problem for the patient.
7. In the last column in the window, you can enter up to 4,000 characters in the **Order Instructions** box (callout 9).
  - a. The instructions entered will apply to all checked orders in the Order List.
  - b. To replace instructions displayed for checked orders in the Order List, the **Override Existing Instructions** toggle must be enabled. If this option is not enabled, content added to the **Order Instructions** field will not be applied when the orders are added to the cart.
8. You may also enter up to 4,000 characters in the **Chart Comment** text box (callout 10).

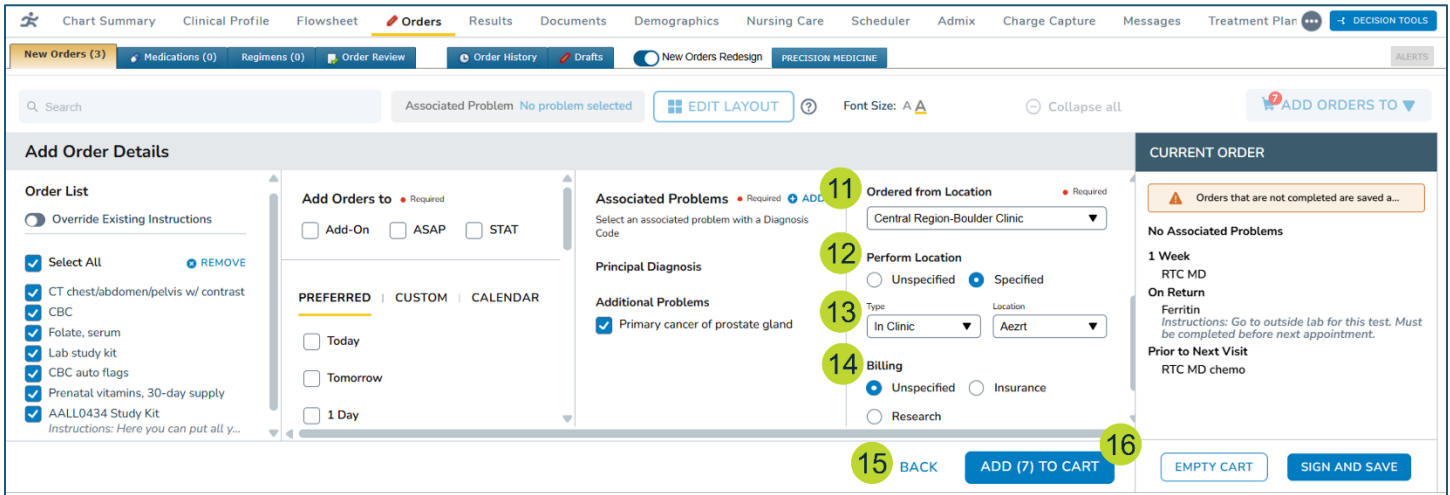
The screenshot shows the 'New Orders' window in the iKnowMed system. The interface includes a top navigation bar with tabs like 'Chart Summary', 'Clinical Profile', 'Flowsheet', 'Orders', 'Results', 'Documents', 'Demographics', 'Nursing Care', 'Scheduler', 'Admix', 'Charge Capture', 'Messages', and 'Treatment Plan'. Below this is a sub-navigation bar with 'New Orders (3)', 'Medications (0)', 'Regimens (0)', 'Order Review', 'Order History', 'Drafts', 'New Orders Redesign', and 'PRECISION MEDICINE'. A search bar and 'Associated Problem' dropdown are visible. The main content area is titled 'Add Order Details' and is divided into several sections:
 

- Order List (Callout 3):** A list of items with checkboxes. A '5' callout points to the 'Override Existing Instructions' toggle.
- Add Orders to (Callout 6):** A section with radio buttons for 'Add-On', 'ASAP', and 'STAT', and tabs for 'PREFERRED', 'CUSTOM', and 'CALENDAR'. Below these are options for 'Today', 'Tomorrow', and '1 Day'.
- Associated Problems (Callout 7):** A section with a search bar and an 'ADD' button (Callout 8). It shows a 'Principal Diagnosis' and 'Additional Problems' with a checked item: 'Primary cancer of prostate gland'.
- Order Instructions (Callout 9):** A text area containing the instruction: 'Please complete all orders before return visit.' A character count 'Maximum: 3,000 Characters (47/3000)' is shown below.
- Chart Comments (Callout 10):** A text area containing the comment: 'Patient is part of clinical trial.'
- CURRENT ORDER:** A summary panel on the right showing 'No Associated Problems', '1 Week', 'RTC MD', 'On Return', 'Ferritin', and 'Prior to Next Visit'.

 At the bottom, there are buttons for 'BACK', 'ADD (7) TO CART', 'EMPTY CART', and 'SIGN AND SAVE'.

9. Beneath that, change the **Ordered from Location** to the necessary practice if it differs from the location selected during login (callout 11).
10. Specify a **Perform Location** for the item, if needed (callout 12).
  - a. If you choose the **Specified** option, the **Type** and **Location** selections will be required (callout 13).

11. Lastly, select a **Billing** option (callout 14).
  - a. By default, **Unspecified** will be selected.
  - b. You can change this to **Insurance**, **Research**, or **Do Not Bill**.
12. If you need to return to the orders screen to add or remove items, click the **Back** option (callout 15). If all the required information is completed, click the **Add to Cart** button (callout 16).

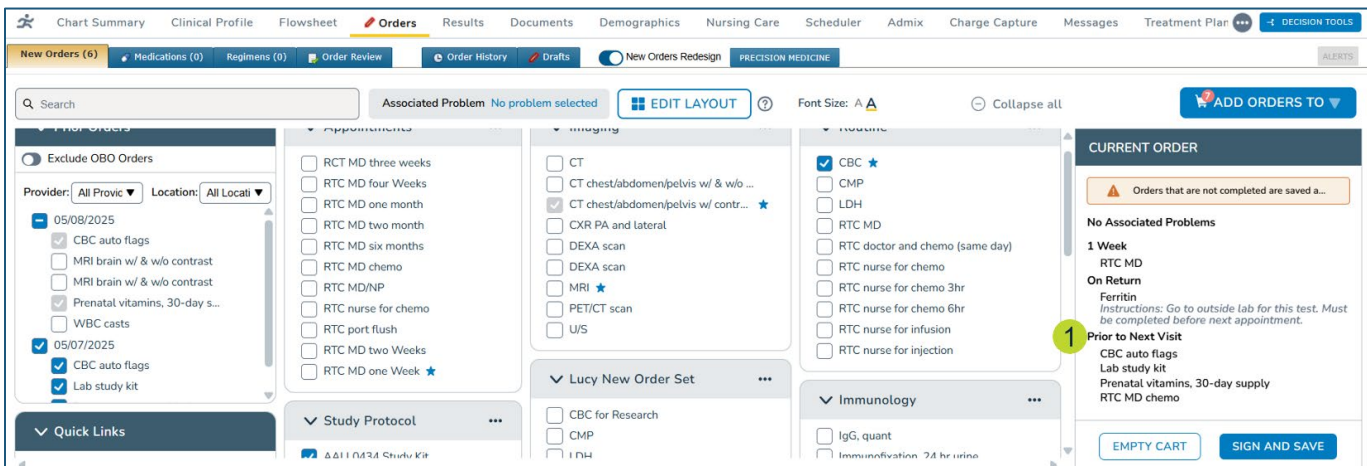


## Editing items in the cart

Changes can be made to orders in the cart by clicking on the name of an individual item or the header for bundled items. Choosing an individual item will only change the details for that order while choosing a header for bundled items will change the details for all orders in that item.

## Edit bundled items

1. Click on the header for a bundled order (callout 1).



2. The order will display the pre-selected **Date of Service** (callout 2).
3. If needed, choose one of the following to change the order date (callout 3):
  - a. Add-On, ASAP, or STAT.
  - b. [One of the Preferred dates set up at the practice or patient level.](#)
  - c. A **Custom** timeframe to select a specific number of days, weeks, or months, or to create a recurring schedule for the item(s).
  - d. The **Calendar** to choose a specific time frame for the item(s).
    - i. Beneath the calendar widget is a list of the patient's next appointments for that month, making it easier to determine the best perform date.

2  Date of Service

Selected Order Date  
 Prior to Next Visit

3 Add Orders to: \* Required  
 Add-On  ASAP  STAT

Preferred Custom Calendar

Today  
 Tomorrow  
 1 Day  
 2 Days  
 3 Days  
 4 Days  
 5 Days  
 Within 1 Week  
 1 Week  
 2 Weeks  
 3 Weeks

Order Instructions

OK CANCEL

4. Check the box next to **Order Instructions** to enter or edit up to 4,000 characters in the text box (callout 4).
  - a. Any content entered in the Order Instructions field will show in the cart.

4  Order Instructions Note: order instructions will be changed for all selected orders

Order Instructions

Complete prior to next visit.

OK CANCEL

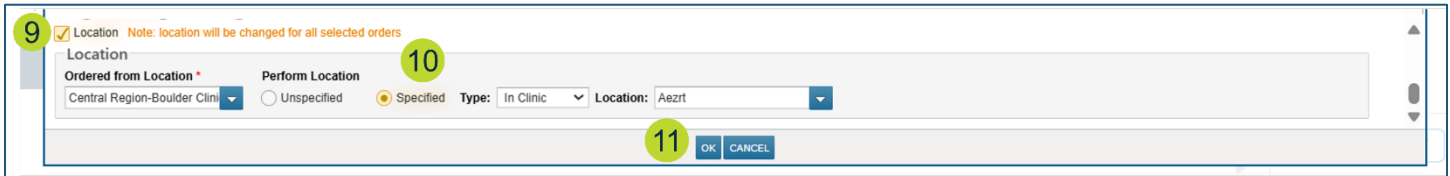
5. Check the box next to **Associated Problem(s)** to change the diagnosis associated with all the orders in the bundle (callout 5).
  - a. Choose one, multiple, or all displayed diagnoses to associate with all the orders in the bundle.
  - b. If a needed diagnosis is not shown, click **Create a new problem** (callout 6).
  - c. This will open the Edit Patient Problem window where you can add a new Problem for the patient.

6. Check the box next to **Chart Comments** to enter or edit up to 4,000 characters in the text box (callout 7).

7. Check the box next to **Bill** to change the billing options (callout 8).
  - a. By default, **Unspecified** will be selected. Orders entered with Unspecified will not display this value in Order History, the Orders Queue, or the order detail dialog accessed from the Flowsheet.
  - b. You can change this to **Insurance**, **Research**, or **Do Not Bill**. These selections will display in the cart for the order.
  - c. Click the **Clear** option to return to the default option.

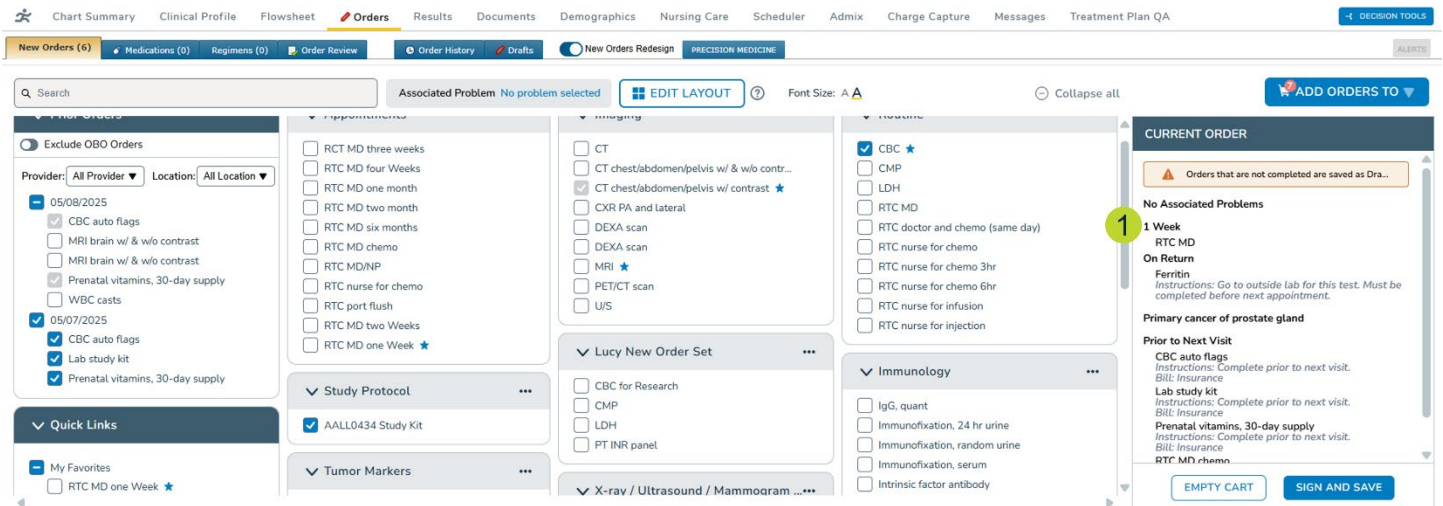
8. Check the box next to **Location** to change the perform location for all the orders in the bundle (callout 9).
  - a. If you choose the **Specified** option, the **Type** and **Location** selections will be required (callout 10).

9. Click the **OK** button to save your changes (callout 11).



## Editing individual items

1. Click on an individual order in the cart (callout 1).



2. The order will display the pre-selected order date (callout 2).
3. If needed, choose one of the following to change the order date (callout 3):
  - a. Add-On, ASAP, or STAT.
  - b. [One of the Preferred dates set up at the practice or patient level.](#)
  - c. A **Custom** timeframe to select a specific number of days, weeks, or months, or to create a recurring schedule for the item(s).
  - d. The **Calendar** to choose a specific time frame for the item(s).
    - i. Beneath the calendar widget is a list of the patient's next appointments for that month, making it easier to determine the best perform date.
4. Change the **Associated Problems** (callout 4) by:
  - a. Choosing one, multiple, or all displayed diagnoses to associate with the order.
  - b. If a needed diagnosis is not shown, click **Add** in the upper corner (callout 5).
  - c. This will open the Edit Patient Problem window where you can add a new Problem for the patient.

5. In the last column in the window, enter or edit up to 4,000 characters each into the **Order Instructions** and **Chart Comment** text boxes (callouts 6-7).
  - a. Any content entered in the Order Instructions field will show in the cart.
6. Beneath that, change the **Ordered from Location**, if needed (callout 8).
7. Add or change the **Perform Location** for the item, if needed (callout 9).
  - a. If you choose the **Specified** option, the **Type** and **Location** selections will be required (callout 10).
8. Lastly, change the **Billing** option (callout 11).
  - a. By default, **Unspecified** will be selected. Orders entered with Unspecified will not display this value in Order History, the Orders Queue, or the order detail dialog accessed from the Flowsheet.
  - b. You can change this to **Insurance**, **Research**, or **Do Not Bill**. These selections will display in the cart for the order.
  - c. Click the **Clear** option to return to the default option.
9. Click the **OK** button to save your changes (callout 12) or click the **Next Order** button to update another order in the cart (callout 13).

The screenshot displays the 'New Orders' tab in the iKnowMed Generation 2 interface. The window title is '1 Week RTC MD 1 Week from 06/17/2025 (Status: Draft)'. The interface is divided into several sections:

- Callout 2:** 'Selected Order Date' section with a checked '1 Week' option.
- Callout 3:** 'Add Orders to: \* Required' section with radio buttons for 'Add-On', 'ASAP', and 'STAT'.
- Callout 4:** 'Associated problems: \* Required' section with a '+ ADD' button and a text input field.
- Callout 5:** 'Principal Diagnosis' section with a text input field.
- Callout 6:** 'Order Instructions' section with a text area containing 'Complete prior to follow-up appointment.' and a 'Maximum 3,960 Characters' limit.
- Callout 7:** 'Chart Comments (not printed)' section with a text area containing 'Clinical trial patient.' and a 'Maximum 3,978 Characters' limit.
- Callout 8:** 'Ordered from Location \*' section with a dropdown menu showing 'Central Region-Boulder Clinic'.
- Callout 9:** 'Perform Location' section with radio buttons for 'Unspecified' and 'Specified'.
- Callout 10:** 'Type:' and 'Location:' sections with dropdown menus showing 'In Clinic' and 'Aezrt'.
- Callout 11:** 'Billing:' section with radio buttons for 'Unspecified', 'Insurance', and 'Research', and a 'Do Not Bill (Other Reason) Clear' option.
- Callout 12:** 'OK' button.
- Callout 13:** 'NEXT ORDER' button.

The interface also includes a 'Preferred' section with radio buttons for 'Today', 'Tomorrow', '1 Day', '2 Days', '3 Days', '4 Days', '5 Days', 'Within 1 Week', '1 Week', '2 Weeks', '3 Weeks', '4 Weeks', 'Within 1 Month', '1 Month', '2 Months', '3 Months', '4 Months', and 'Per Instruction'.

## Save orders

1. All items in the cart can be removed by clicking **Empty Cart** (callout 1).
2. To complete your order, click **Sign And Save** (callout 2).
3. For practices that require a PIN, providers will be prompted to enter their PIN to complete the order.

# Layout and customization options

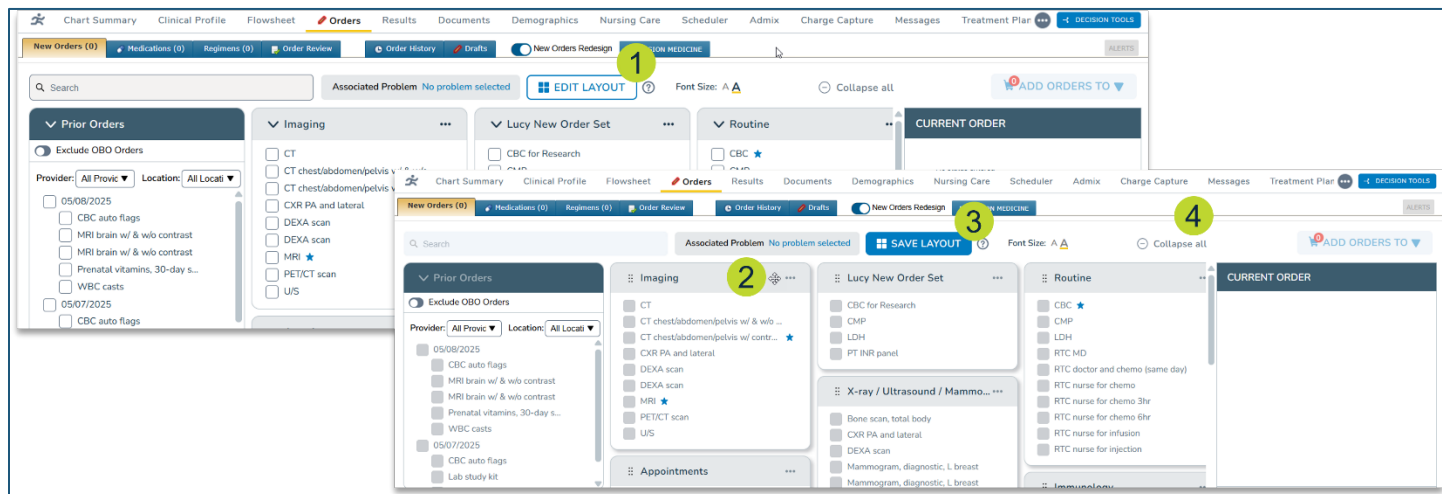
## Order panels

All panels can be edited and rearranged by providers for more efficient use. Non-provider users cannot edit the layout of the panels on the screen or edit panel contents, edit panel name, or remove a panel. These options will display in a disabled state.

## Changing the layout

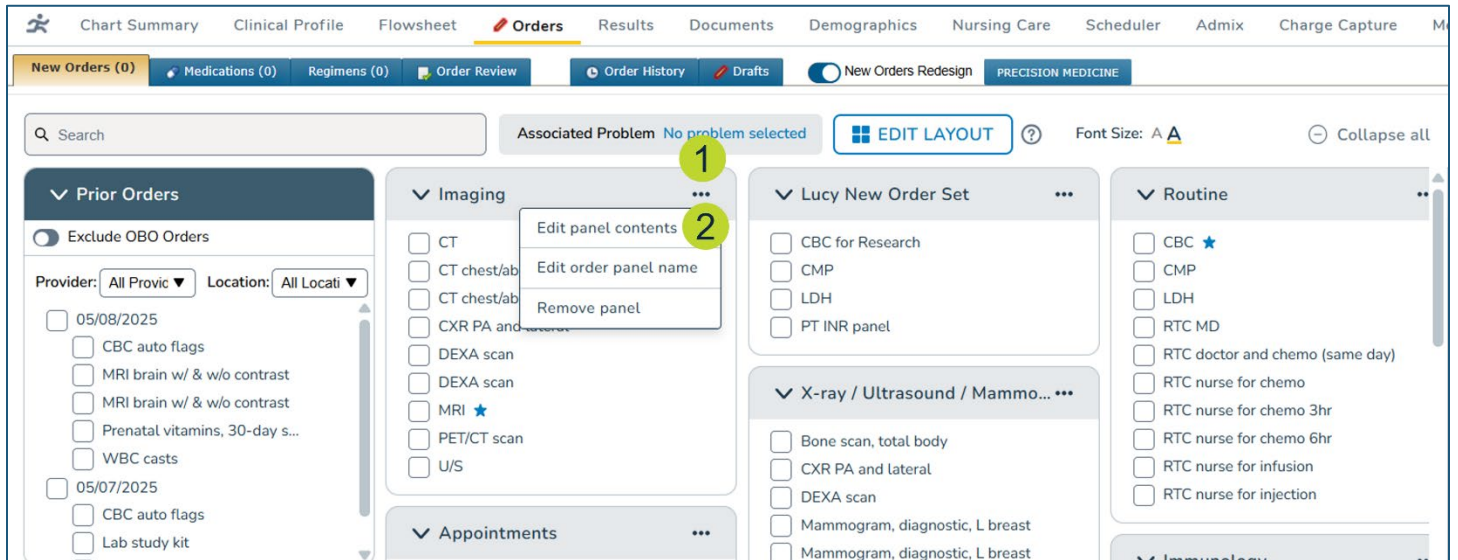
To change the layout of order panels:

1. Click the **Edit Layout** button (callout 1).
2. Hover over the header until your cursor turns into the move icon (callout 2).
3. Drag and drop the boxes until they align with your preferred display.
4. Click the **Save Layout** button to preserve your changes (callout 3).
5. You can also expand or collapse the panels on the screen (callout 4).
  - a. Once you expand a panel, it will remain expanded across additional charts and the system will retain this view in subsequent login sessions. If you prefer not to keep the panel expanded, collapse it when finished.



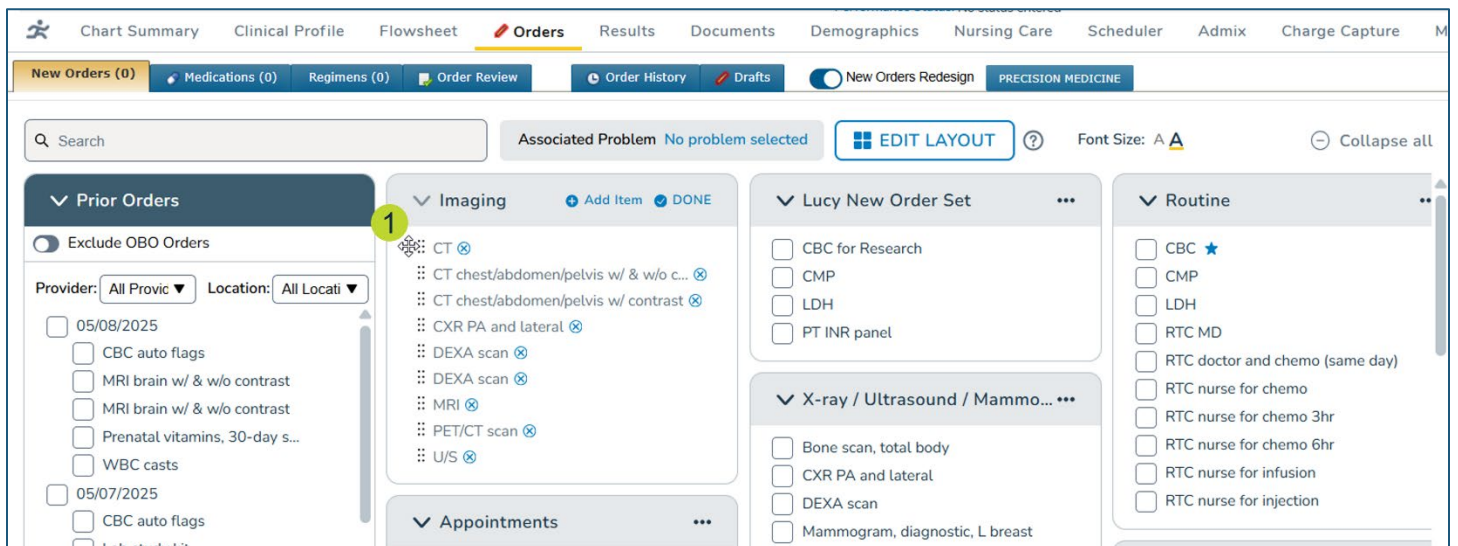
## Editing each panel

To edit each panel, select the three dots in the header and choose **Edit panel contents** to reorganize, add, or remove items (callouts 1-2).



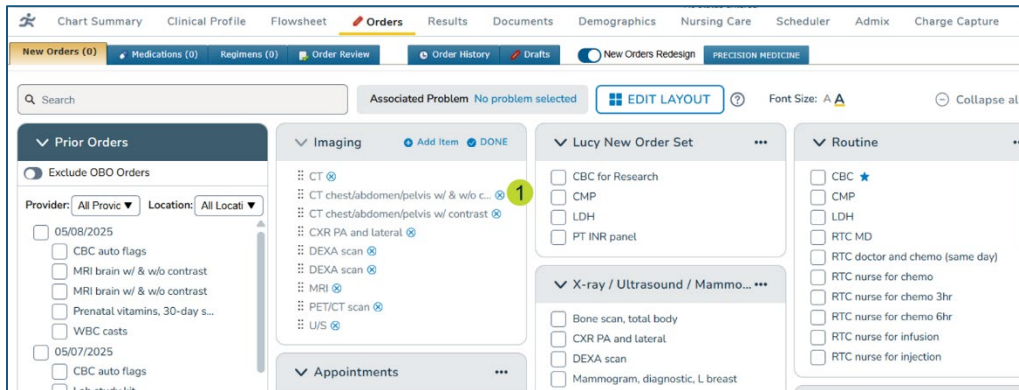
## Reorganizing items in a panel

To reorganize the items in a panel, hover over the dots until your cursor turns into the move icon (callout 1). Drag and drop the items into your preferred order.



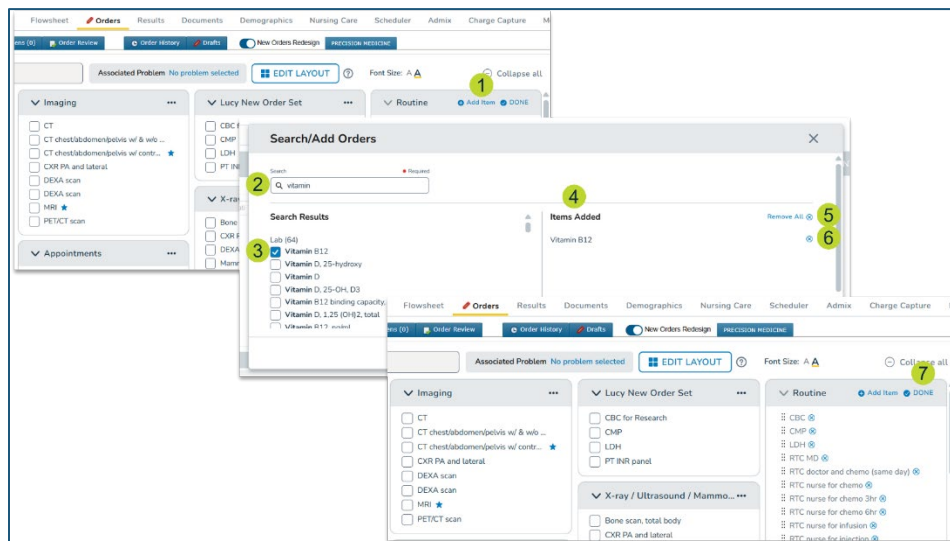
## Removing items in a panel

To remove items in a single panel, click on the **x** icon next to the item (callout 1).



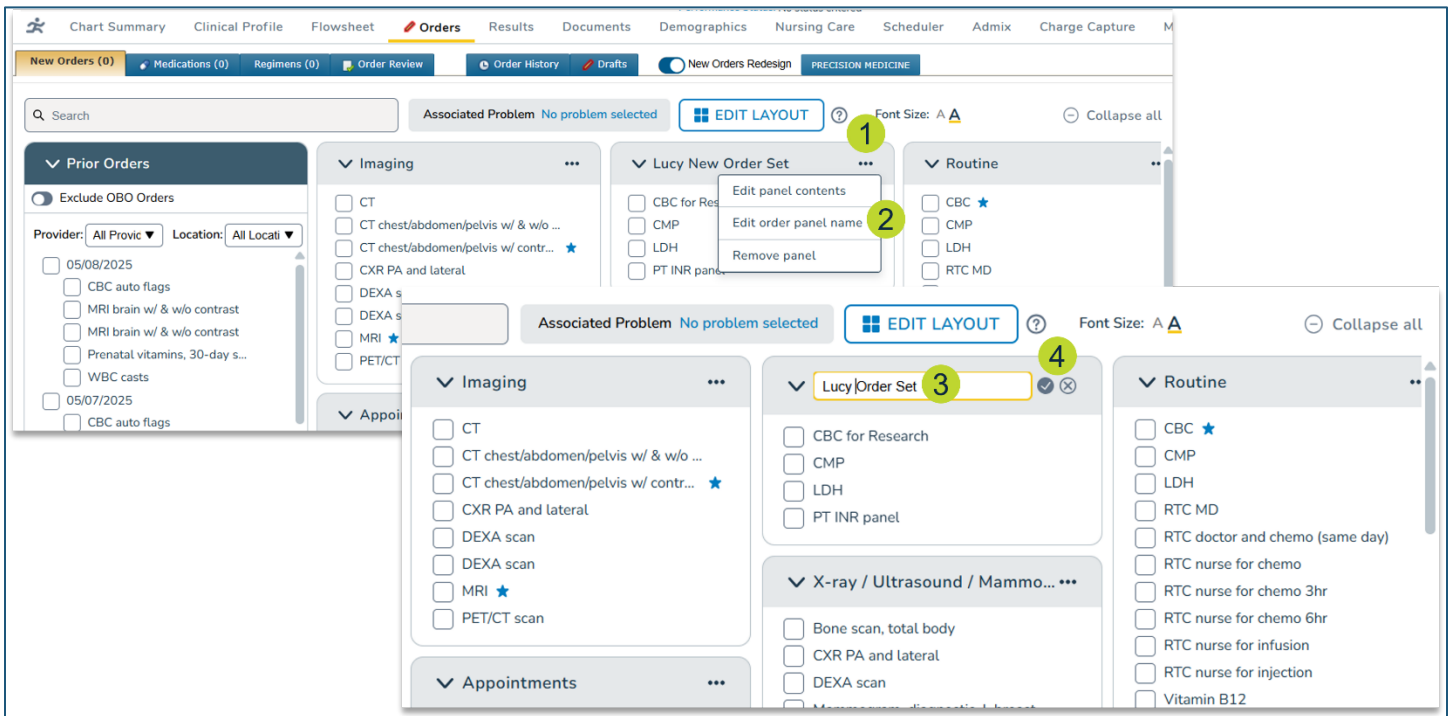
## Adding items to a panel

1. To add items to a panel, click **Add Item** in the header (callout 1).
2. In the Search/Add Orders window, use the search bar to locate an item (callout 2).
3. The results will be organized into categories (**Lab**, **Service**, etc.), making it easier to locate the item needed.
4. Select the correct item from the results (callout 3).
5. It will appear in the **Items Added** column (callout 4).
6. If you need to remove the item, click the **Remove All** or the **x** icon (callouts 5-6).
7. Save your changes.
8. Once the panel is customized to your preferences, click **DONE** (callout 7).



## Renaming a panel

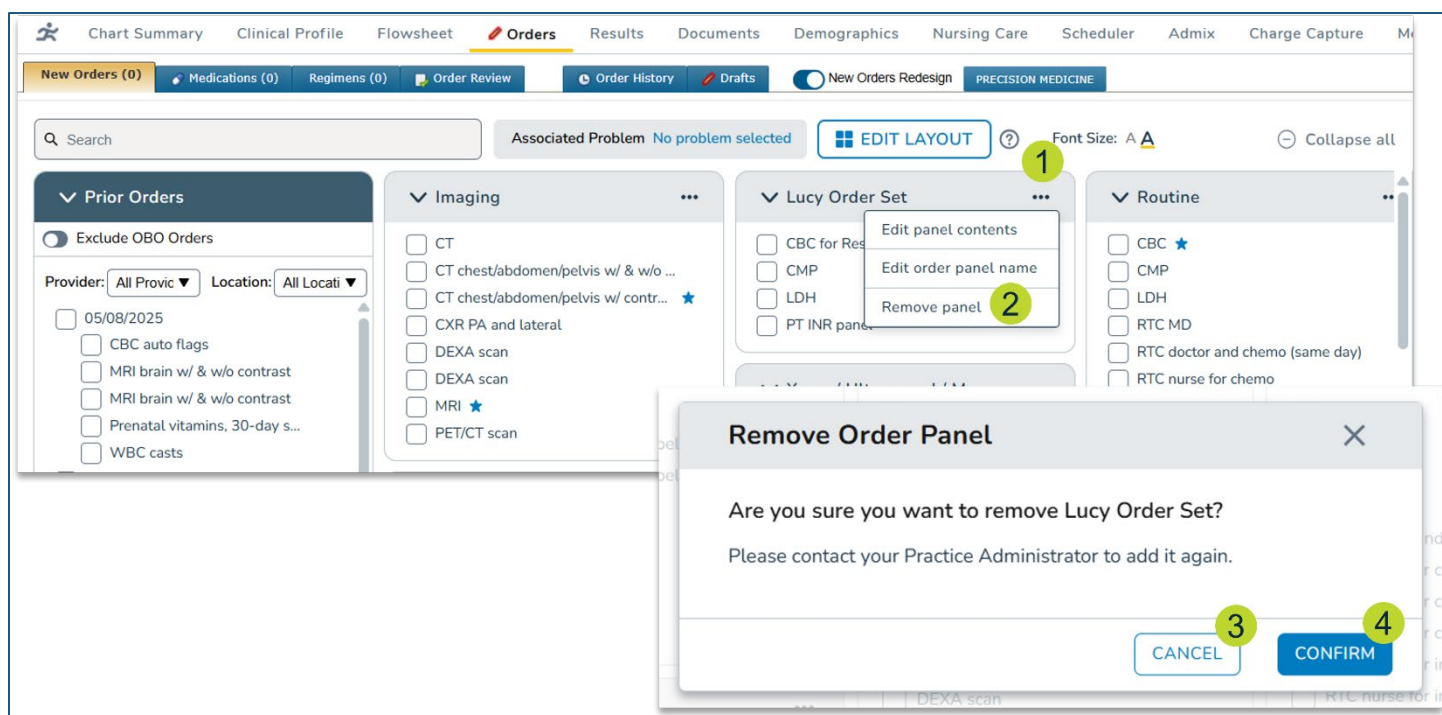
1. To rename a panel, select the three dots in the header and choose **Edit order panel name** (callouts 1-2).
2. Enter the preferred title in the text field (callout 3).
3. Click the check mark to save the new name or the **x** icon to keep the current name (callout 4).



## Removing a panel

1. To remove an entire panel, select the three dots in the header and choose **Remove panel** (callouts 1-2).
2. A window will appear to confirm the changes.
3. Click **Cancel** to keep the panel or **Confirm** to remove the panel (callouts 3-4).

**Note:** You cannot re-add a panel from the patient chart once it's been removed. An administrator with access to Manage Order Sets will need to create or copy the panel for the user.



## Editing Order Sets

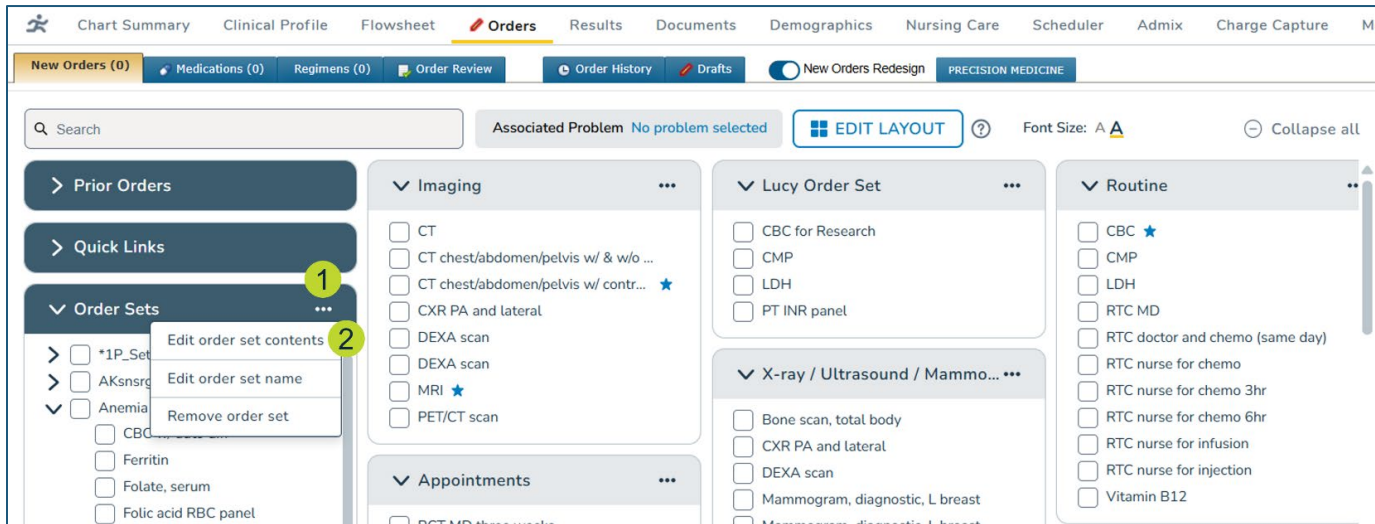
Order sets can be customized by providers differently depending on whether they are defined by individual users or by the practice as a whole:

- **User-defined order sets** can be fully customized. Users can rearrange, remove, edit, and rename these order sets to suit their workflow needs.
- **Practice-defined order sets** have limited customization options. Users can only rearrange these sets but cannot edit, remove, or rename them. This restriction ensures that standardized order sets, accessible to all users in your practice, remain consistent and avoid unintended changes.

Non-provider users cannot access the customization options for order sets. They cannot edit order set contents, edit order set name, or remove an order set. This also applies to entering orders On Behalf Of another provider.

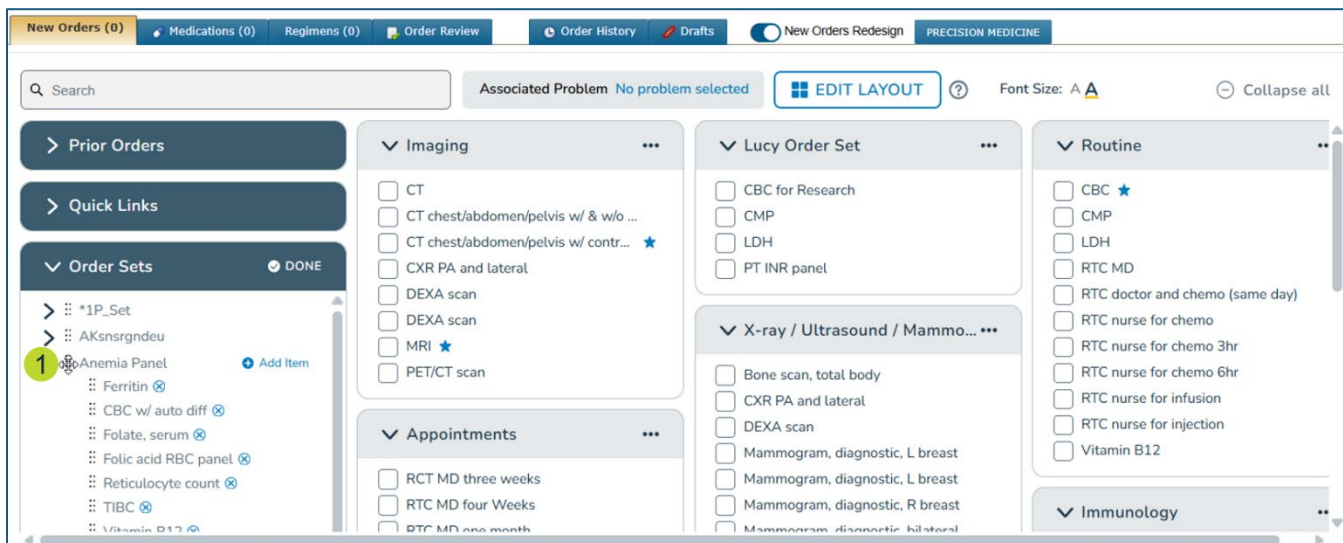
## Editing an order set

To edit an order set, select the three dots in the header and choose **Edit order set contents** to reorganize, add, or remove items in the order set (callouts 1-2).



## Reorganizing items in an order set

To reorganize a *practice or user-defined order set*, hover over the dots until your cursor turns into the move icon (callout 1). Drag and drop the items into your preferred order.



## Remove items in an order set

To remove items from a *user-defined order set*, click on the **x** icon next to the item (callout 1).

The screenshot displays the 'New Orders' interface with a top navigation bar containing 'New Orders (0)', 'Medications (0)', 'Regimens (0)', 'Order Review', 'Order History', 'Drafts', 'New Orders Redesign', and 'PRECISION MEDICINE'. Below the navigation bar is a search bar and a section for 'Associated Problem' (No problem selected) with an 'EDIT LAYOUT' button and font size controls. The main area is divided into several panels:

- Prior Orders** and **Quick Links** (dark blue buttons).
- Order Sets** (dropdown menu with 'DONE' status):
  - \*1P\_Set
  - AKsnsrgnde
  - Anemia Panel (expanded):
    - Ferritin (with 'x' icon)
    - CBC w/ auto diff (with 'x' icon and callout 1)
    - Folate, serum (with 'x' icon)
    - Folic acid RBC panel (with 'x' icon)
    - Reticulocyte count (with 'x' icon)
    - TIBC (with 'x' icon)
    - Vitamin B12 (with 'x' icon)

- Imaging** (dropdown menu):
- CT
- CT chest/abdomen/pelvis w/ & w/o ...
- CT chest/abdomen/pelvis w/ contr... (with star icon)
- CXR PA and lateral
- DEXA scan
- DEXA scan
- MRI (with star icon)
- PET/CT scan
- Lucy Order Set** (dropdown menu):
- CBC for Research
- CMP
- LDH
- PT INR panel
- X-ray / Ultrasound / Mammo...** (dropdown menu):
- Bone scan, total body
- CXR PA and lateral
- DEXA scan
- Mammogram, diagnostic, L breast
- Mammogram, diagnostic, L breast
- Mammogram, diagnostic, R breast
- Mammogram, diagnostic, bilateral
- Appointments** (dropdown menu):
- RCT MD three weeks
- RCT MD four Weeks
- RCT MD one month
- Routine** (dropdown menu):
- CBC (with star icon)
- CMP
- LDH
- RTC MD
- RTC doctor and chemo (same day)
- RTC nurse for chemo
- RTC nurse for chemo 3hr
- RTC nurse for chemo 6hr
- RTC nurse for infusion
- RTC nurse for injection
- Vitamin B12
- Immunology** (dropdown menu)

## Adding items to an order set

1. To add items to a *user-defined order set*, click **Add Item** in the header (callout 1).
2. In the Search/Add Orders window, use the search bar to locate an item (callout 2).
3. The results will be organized into categories (**Lab**, **Service**, etc.), making it easier to locate the item needed.
4. Select the correct item from the results (callout 3).
5. It will appear in the **Items Added** column (callout 4).
6. If you need to remove the item, click **Remove All** or the **x** icon (callouts 5-6).
7. Save your changes.
8. Once the order set is customized to your preferences, click **DONE** to save your changes (callout 7).

The image displays two screenshots of the iKnowMed interface, illustrating the steps to add items to an order set.

**Top Screenshot: Search/Add Orders Window**

- Callout 1:** Points to the "Add Item" button in the "Order Sets" list on the left sidebar.
- Callout 2:** Points to the search bar in the "Search/Add Orders" window, where "vitamin" is entered.
- Callout 3:** Points to the "Vitamin B12" item selected in the "Search Results" list under the "Lab (64)" category.
- Callout 4:** Points to the "Vitamin B12" item now listed in the "Items Added" column.
- Callout 5:** Points to the "Remove All" button in the "Items Added" column.
- Callout 6:** Points to the "x" icon next to the "Vitamin B12" item in the "Items Added" column.

**Bottom Screenshot: Order Sets List**

- Callout 7:** Points to the "DONE" button in the "Order Sets" list on the left sidebar.

## Renaming an order set

1. To rename a *user-defined order set*, select the three dots in the header and choose **Edit order set name** (callouts 1-2).
2. Enter the preferred title in the text field (callout 3).
3. Click the check mark to save the new name or the **x** icon to keep the current name (callout 4).
4. Click **DONE** to save your changes (callout 5).

The screenshot shows the 'New Orders' tab in the iKnowMed interface. The top navigation bar includes 'New Orders (0)', 'Medications (0)', 'Regimens (0)', 'Order Review', 'Order History', 'Drafts', 'New Orders Redesign', and 'PRECISION MEDICINE'. The main content area is divided into several sections: 'Prior Orders', 'Quick Links', and 'Order Sets'. The 'Order Sets' section is expanded to show a list of order sets, including '\*1P\_Set', 'AKsnsrgndeu', and 'Anemia Panel Set'. The 'Anemia Panel Set' is selected, and its details are shown in a large panel on the right. This panel includes a search bar, 'Associated Problem' (No problem selected), 'EDIT LAYOUT' button, font size controls, and a 'Collapse all' button. The order set details are organized into categories: 'Imaging', 'Lucy Order Set', 'Routine', 'X-ray / Ultrasound / Mammo...', and 'Appointments'. Each category contains a list of items with checkboxes. The 'Anemia Panel Set' is currently named 'Anemia Panel Set' and has a checkmark icon next to it, indicating it is ready to be saved. A 'DONE' button is visible at the bottom of the 'Order Sets' list.

## Removing an order set

1. To remove a *user-defined order set*, select the three dots in the header and choose the **Remove order set** to delete a *user-defined order set* (callouts 1-2).
2. Click the **x** icon next to the order set (callout 3).
3. A window will appear to confirm the changes.
4. Click **Cancel** to keep the order set or **Confirm** to remove the panel (callouts 4-5).

**Note:** You cannot re-add an order set from the patient chart once it's been removed. An administrator with access to Manage Order Sets will need to create or copy the order set for the user.

The screenshot displays the 'New Orders' tab in the iKnowMed interface. The 'Order Sets' section is expanded, and a context menu is open over the 'Anemia' order set, with 'Remove order set' selected. A 'Remove Order Set' dialog box is displayed in the foreground, asking for confirmation to remove the 'Anemia Panel Set' and providing instructions to contact the Practice Administrator. The dialog has 'CANCEL' and 'CONFIRM' buttons.

# Administrator configuration options

Practice administrators should set order date preferences before providers use the redesigned New Order tab to ensure the use of preferred order scheduling options.

## Order date settings

Practices and users must set the following order date settings for the redesigned New Orders tab. For more information on how to set these preferences, [visit the Help site](#).

- Default New Order Date:** Practices can select a **Default New Order Date**, which controls the perform date for all orders (callout 1). Moreover, by enabling the **Allow Users to Customize** setting (callout 2), practices can permit individual users to customize their Default New Order Date according to their preferences.

- Preferred Date Options:** Choose from an expanded list of Preferred date options, which can be further customized by individual users, depending on your preferences. In the **Preferred Settings** section, choose the order date options you want to be available for all practice users (callout 3). These options will be displayed in the **Preferred** section of the order details window. To allow practice users to set their preferences, check the box next to **Allow users to customize the Preferred section on the order details modal** (callout 4).

## Users access settings

Lastly, update user permissions and grant access to the redesigned New Orders tab on the user's **Permissions** screen. Under **Patient Chart**, set the **New Orders Redesign** permission to **Full** (callout 1).

For more information on how to set these permissions, [visit the Help site topic on user preferences](#). Refer to these [Help site instructions on applying these permissions to multiple practice users](#).

Patient Chart			
	NONE	VIEW	FULL
	None	View	Full
Admix	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Messages	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Chart Summary Library	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Clinical Profile	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Demographics	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Documents	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
AI Scribe	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
External Records	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Flowsheet	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Nursing Care	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
CDS Tools	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
New Problem List	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Results	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Results, Interface	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Vitals	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Medication Orders	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Non-Medication Orders	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
<b>1</b> New Orders Redesign	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Regimen Orders	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Care Management	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>