

Initiate Order



Course Overview

Orders are used in the CorrecTek Electronic Health Record (EHR) system to coordinate patient follow-up care. While orders are commonly created during visit documentation, there are situations where follow-up care must be ordered outside of a documented visit.

This guide walks you through how to initiate two types of orders:

- **Repeating Orders** – Used for recurring actions that continue until completed or discontinued, such as blood sugar checks, blood pressure assessments or other ongoing care needs.
- **Single Treatment Orders** – Used for actions performed once and then closed, such as visits, lab draws or chart reviews.

Use This Guide When

- An order was not created during visit documentation
- Follow-up care needs to be initiated manually
- A provider has issued a verbal or administrative order
- Locating a patient, selecting an order, configuring required settings, and saving it.

Tip: You may not need to complete every step shown in this guide, depending on the order selected.

What You'll Be Able to Do

- Initiate a new order outside of a visit
- Select and assign an order to the correct patient
- Apply providers, patterns, priorities, and duration settings
- Add instructions and comments when required
- Save an order successfully

Initiate Order



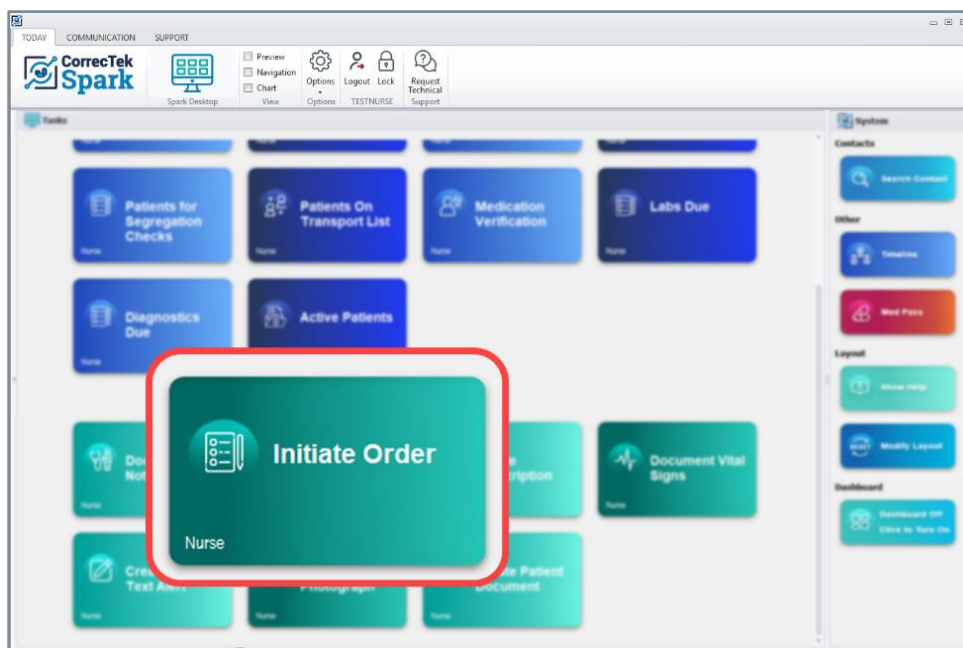
Topics Covered

Course Overview	1
Use This Guide When	1
What You'll Be Able to Do	1
Spark Desktop	3
Select a Patient Screen.....	3
Search Orders Screen	4
Order Screen.....	6
Type: Repeating Orders	6
Type: Single Treatment Orders.....	14
Reference Page	22

Initiate Order

Spark Desktop

From the CorrecTek desktop, click **Initiate Order**.



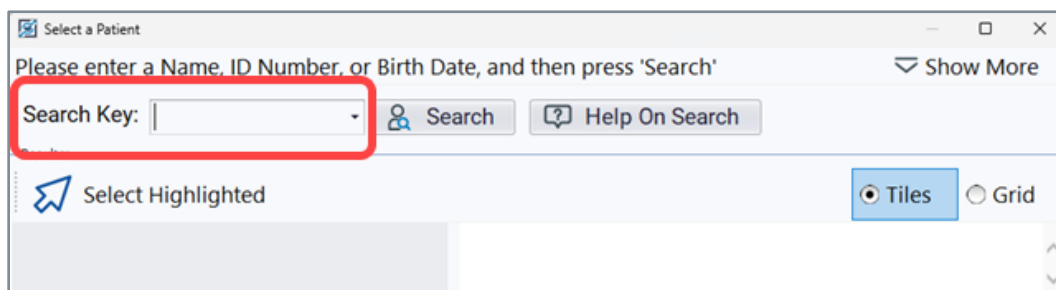
Select a Patient

The Select a Patient dialog box opens, serving as a census search for all patients in the facility.

Search Patient

Use the **Search Key** field to type identifiable information to locate a patient. Then, click **Search**.

| Tip: Identifiable information could include first and/or last name, ID number, or DOB.

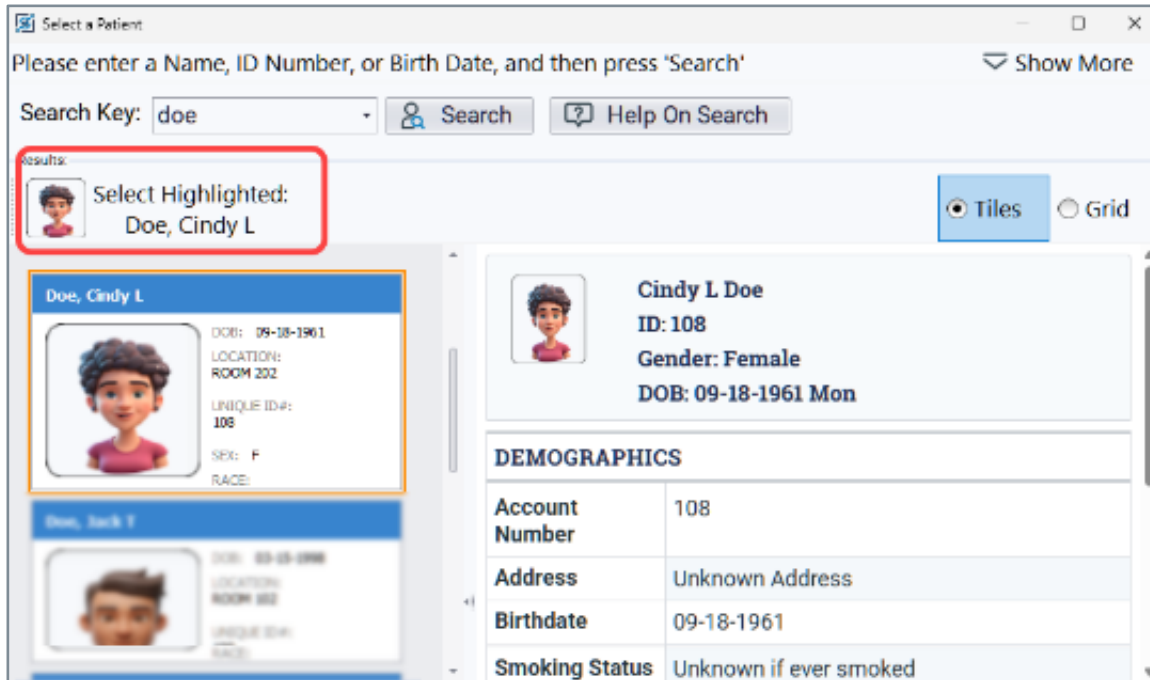


Initiate Order

Select Patient

Locate and select the correct patient in the search results. Click **Select Highlighted** to open the Search Orders screen.

| Tip: Demographic and Contact Information displays to the right when a patient is highlighted.



Select a Patient

Please enter a Name, ID Number, or Birth Date, and then press 'Search' Show More

Search Key: Search Help On Search

Results:

Select Highlighted:
Doe, Cindy L

Doe, Cindy L
DOB: 09-18-1961
LOCATION: ROOM 202
UNIQUE ID#: 108
SEX: F
RACE:

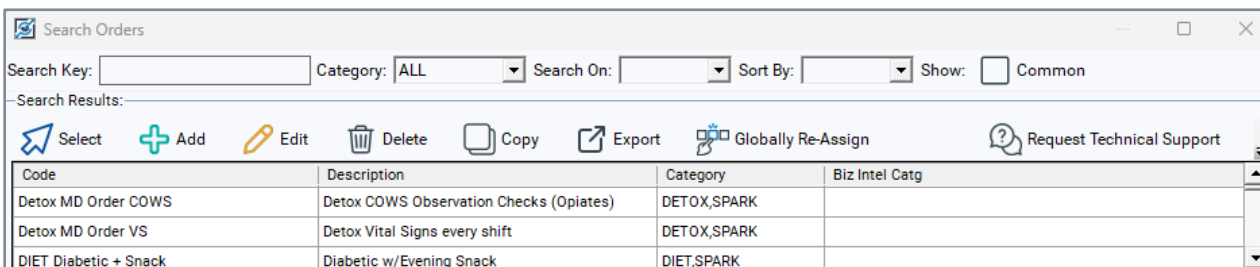
Cindy L Doe
ID: 108
Gender: Female
DOB: 09-18-1961 Mon

DEMOGRAPHICS

Account Number	108
Address	Unknown Address
Birthdate	09-18-1961
Smoking Status	Unknown if ever smoked

Search Orders

Use this screen to locate and select the order you want to assign to the patient.



Search Orders

Search Key: Category: Search On: Sort By: Show: ☐ Common

Search Results:

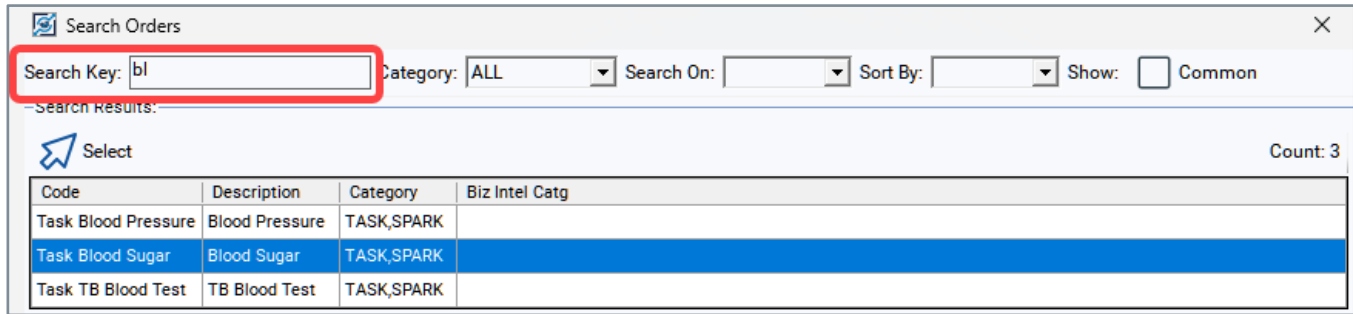
Select Add Edit Delete Copy Export Globally Re-Assign Request Technical Support

Code	Description	Category	Biz Intel Catg
Detox MD Order COWS	Detox COWS Observation Checks (Opiates)	DETOX,SPARK	
Detox MD Order VS	Detox Vital Signs every shift	DETOX,SPARK	
DIET Diabetic + Snack	Diabetic w/Evening Snack	DIET,SPARK	

Initiate Order

Find an Order

Use the **Search Key** field to type keywords related to the order. The list of available orders updates as you type.



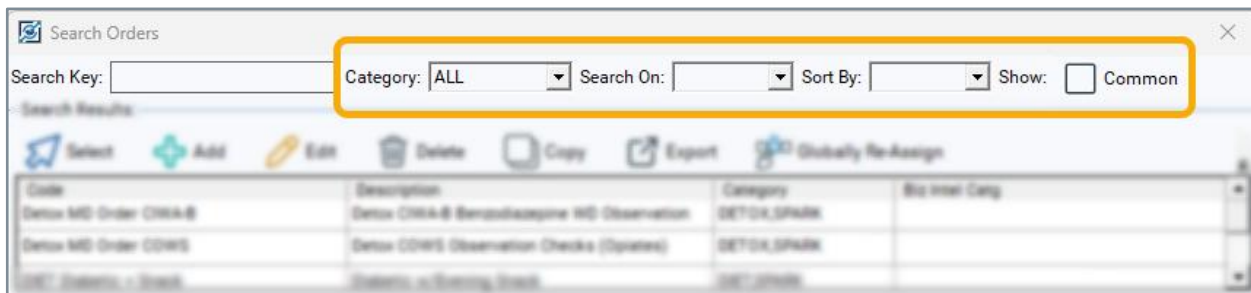
The screenshot shows the 'Search Orders' window. The 'Search Key' field is highlighted with a red box and contains the text 'bl'. The 'Category' dropdown is set to 'ALL'. The 'Search On' and 'Sort By' dropdowns are empty. The 'Show' checkbox for 'Common' is unchecked. The 'Search Results' section shows a table with 3 results.

Code	Description	Category	Biz Intel Catg
Task Blood Pressure	Blood Pressure	TASK,SPARK	
Task Blood Sugar	Blood Sugar	TASK,SPARK	
Task TB Blood Test	TB Blood Test	TASK,SPARK	

Narrow the Results (Optional)

You can also use the options at the top of the screen to narrow the search results.

- **Category** – Filters order by type, such as Visit, Task, Diet or Lab
- **Search On** – Specifies whether to search by order Code or Description
- **Sort By** – Changes how the results are sorted
- **Common** – Displays orders marked as commonly used at the facility



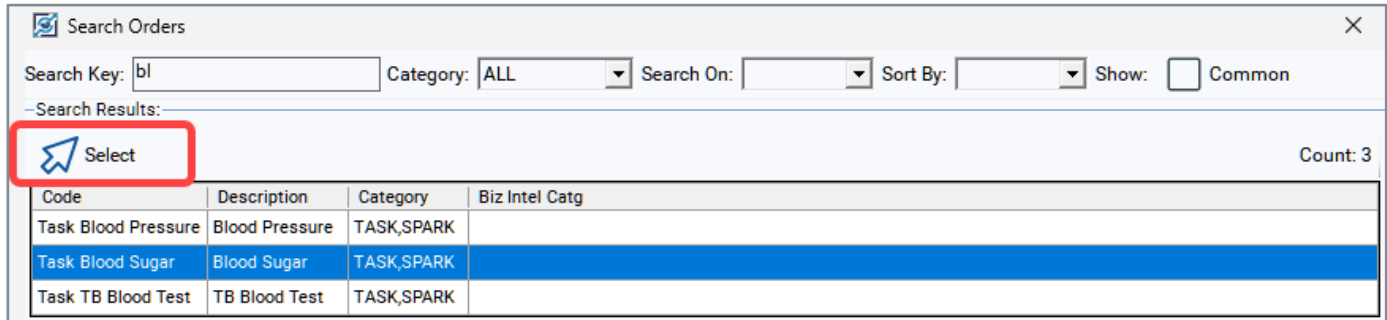
The screenshot shows the 'Search Orders' window with the 'Category', 'Search On', and 'Sort By' dropdowns highlighted by a yellow box. The 'Search Key' field is empty. The 'Show' checkbox for 'Common' is unchecked. The 'Search Results' section shows a table with 3 results.

Code	Description	Category	Biz Intel Catg
Detox MD Order CINA-B	Detox CINA-B Benzodiazepine MD Observation	DET/DL,SPARK	
Detox MD Order COWS	Detox COWS Observation Checks (Signed)	DET/DL,SPARK	
DET Systems - Search	Systems in Training Search	DET/SPARK	

Initiate Order

Select an Order

Once the order is located, highlight it and click **Select**. This will open the Order Screen.



Search Orders

Search Key: Category: Search On: Sort By: Show: ☐ Common

Search Results:

 **Select** Count: 3

Code	Description	Category	Biz Intel Catg
Task Blood Pressure	Blood Pressure	TASK,SPARK	
Task Blood Sugar	Blood Sugar	TASK,SPARK	
Task TB Blood Test	TB Blood Test	TASK,SPARK	

Order Screen

Note: All orders are initiated the same way. From the Order Screen forward, the process varies by order type.

Repeating Orders

After selecting an order, the Order Screen prepopulates the patient's name and order type. For this example, we will initiate a Blood Sugar order.



BLOOD SUGAR - Doe, Cindy L #108

Status: Implementation New Approval Pending Approve/Repeat

Patient:

Order:

Provider: 

Patient: 

☐ Verbal Order Type:

Priority: Duration (Days):

Requested Dates and Shifts:

Start Date: Shift:

End Date: Shift:

Additional Details:

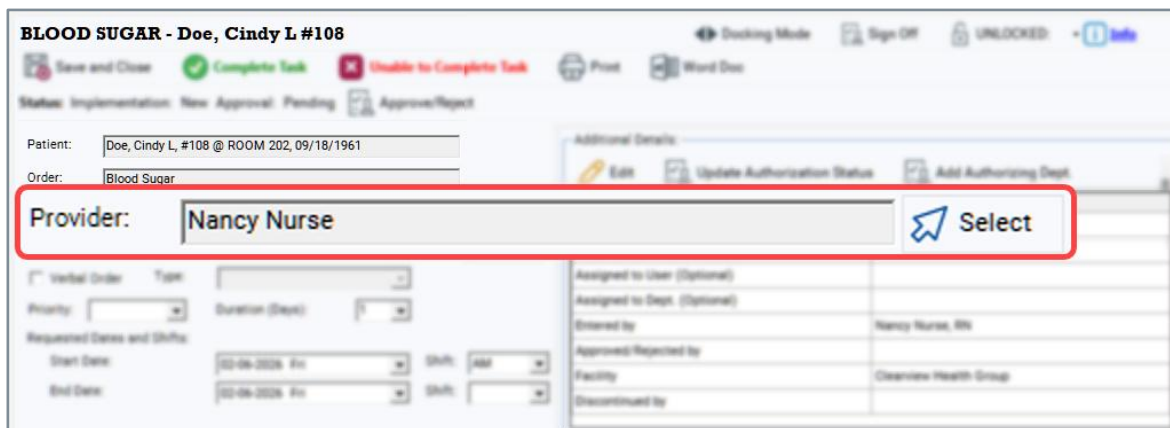
Title	Party
Supervising Department	Medical
Implementation Department	Medical
Assigned to User (Optional)	
Assigned to Dept. (Optional)	
Entered by	Nancy Nurse, RN
Approved/Rejected by	
Facility	Clearview Health Group
Discontinued by	

Initiate Order

Select Provider

The Provider field defaults to the user logged in to the system.

Confirm the correct ordering provider is listed. If not, click **Select**.



BLOOD SUGAR - Doe, Cindy L #108

Save and Close Complete Task Unable to Complete Task Print Word Doc

Status: Implementation New Approval Pending Approve/Reject

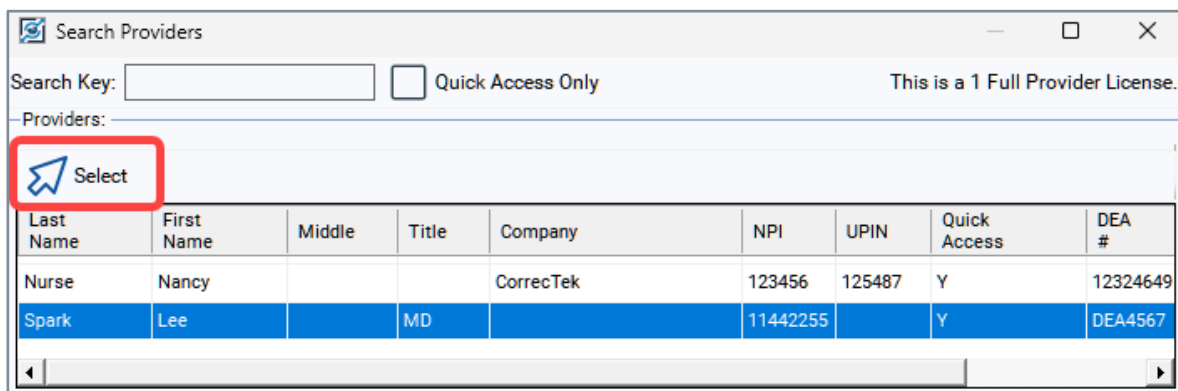
Patient: Doe, Cindy L, #108 @ ROOM 202, 09/18/1961

Order: Blood Sugar

Provider: Nancy Nurse **Select**

Assigned to User (Optional)
Assigned to Dept. (Optional)
Entered by: Nancy Nurse, RN
Approved/Reported by:
Facility: Clearview Health Group
Discontinued by:

The Search Providers window will open. Highlight the applicable provider and click **Select**.



Search Providers

Search Key: Quick Access Only This is a 1 Full Provider License.

Providers:

Select

Last Name	First Name	Middle	Title	Company	NPI	UPIN	Quick Access	DEA #
Nurse	Nancy			CorrecTek	123456	125487	Y	12324649
Spark	Lee		MD		11442255		Y	DEA4567

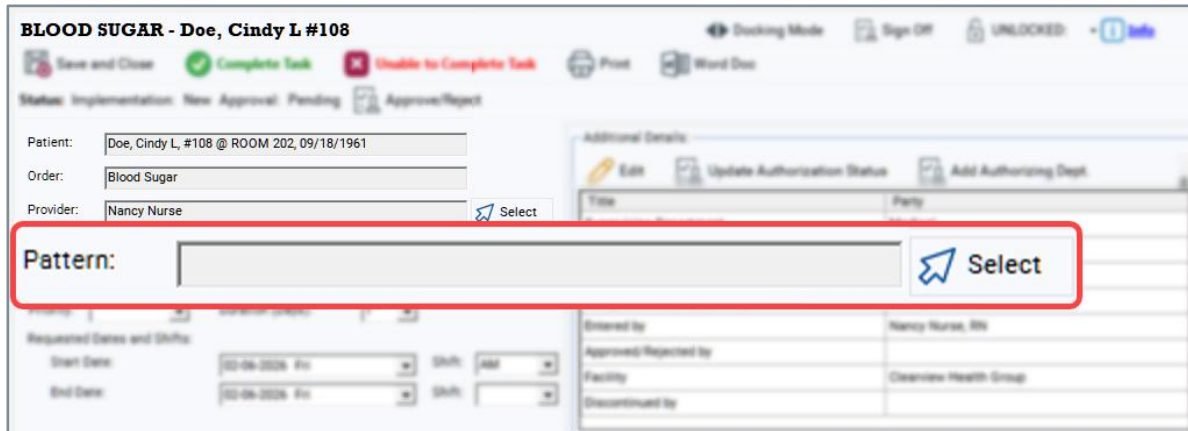
Assign a Pattern

Patterns define how often an action is performed for a patient, such as blood pressure or blood sugar checks.

Initiate Order

To assign a pattern, click **Select** next to the Pattern field.

| Tip: Patterns are only available when creating a Repeating Order.



BLOOD SUGAR - Doe, Cindy L #108

Save and Close Complete Tools Unable to Complete Tools Print Word Doc

Status: Implementation: New Approval: Pending Approve/Reject

Patient: Doe, Cindy L, #108 @ ROOM 202, 09/18/1961

Order: Blood Sugar

Provider: Nancy Nurse  Select

Pattern:  Select

Additional Details

Edit Update Authorization Status Add Authorizing Dept

Entered by: Nancy Nurse, RN

Approved/Rejected by:

Facility: Clearview Health Group

Discontinued by:

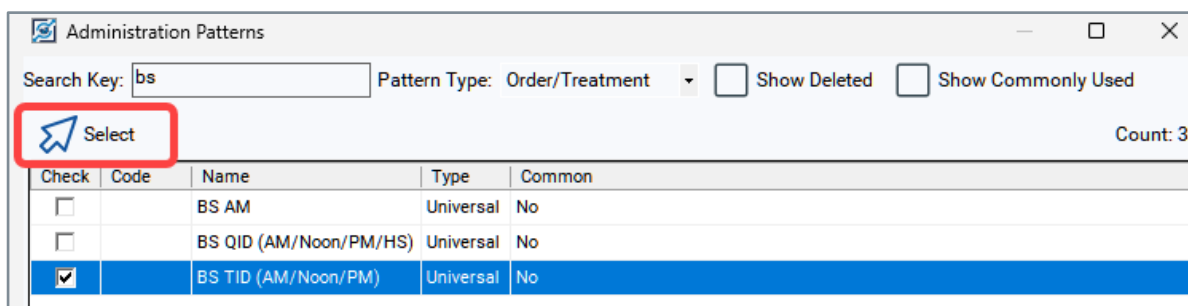
Select a Pattern

Use the **Search Key** field to type keywords to narrow the list of available patterns.

Common patterns include Once a Day (Q), Twice a Day (BID), Three Times a Day (TID), and Four Times a Day (QID).

Find and highlight the correct pattern, then click **Select**.

| Tip: Blood Sugar checks and insulin orders require a **BS (Blood Sugar)** pattern to keep them scheduled separately from any med passes.



Administration Patterns

Search Key: bs Pattern Type: Order/Treatment ☐ Show Deleted ☐ Show Commonly Used

 Select Count: 3

Check	Code	Name	Type	Common
☐		BS AM	Universal	No
☐		BS QID (AM/Noon/PM/HS)	Universal	No
☒		BS TID (AM/Noon/PM)	Universal	No

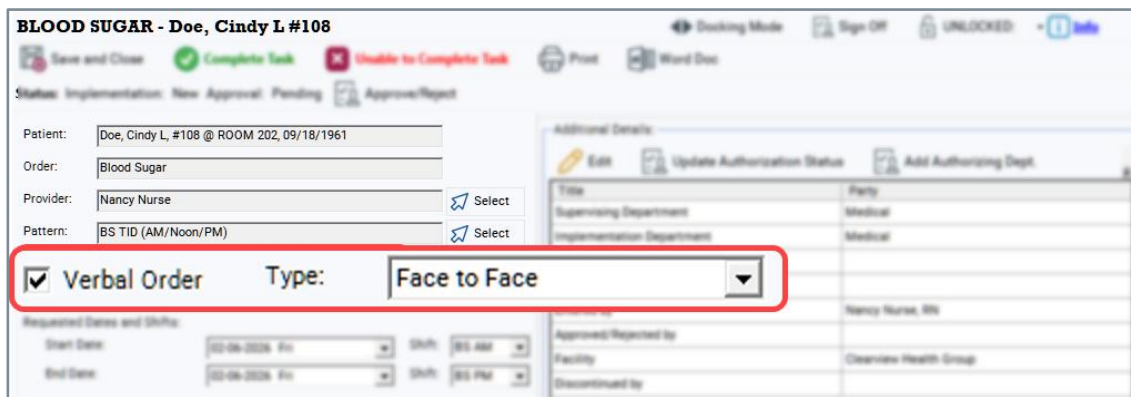
Verbal Order

Check the **Verbal Order** option when the order is based on verbal or administrative instruction from a provider.

| Tip: If the order is created as a Verbal Order, the checkbox may be automatically selected.

Initiate Order

Then use the **Type** drop-down to choose the appropriate verbal order type.



BLOOD SUGAR - Doe, Cindy L #108

Save and Close Complete Task Unable to Complete Task Print Word Doc

Status: Implementation New Approval Pending Approve/Reject

Patient: Doe, Cindy L, #108 @ ROOM 202, 09/18/1961

Order: Blood Sugar

Provider: Nancy Nurse Select

Pattern: BS TID (AM/Noon/PM) Select

☒ Verbal Order Type: Face to Face

Requested Dates and Shifts:

Start Date: 10-06-2026 Fri Shift: BS AM

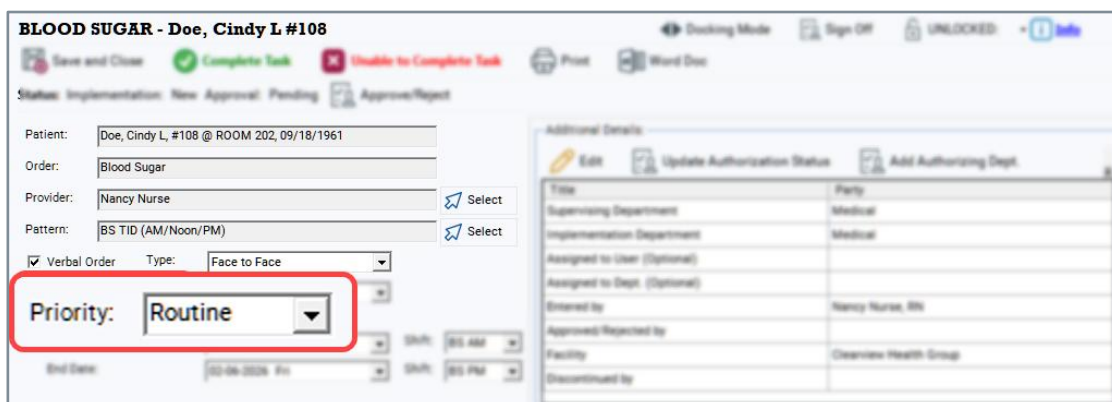
End Date: 10-06-2026 Fri Shift: BS PM

Additional Details:

Title	Party
Supervising Department	Medical
Implementation Department	Medical
Assigned to User (Optional)	Nancy Nurse, RN
Assigned to Dept. (Optional)	
Entered by	Nancy Nurse, RN
Approved/Rejected by	
Facility	Clearview Health Group
Discontinued by	

Priority

Use the **Priority** field to set how urgently the order should be completed.



BLOOD SUGAR - Doe, Cindy L #108

Save and Close Complete Task Unable to Complete Task Print Word Doc

Status: Implementation New Approval Pending Approve/Reject

Patient: Doe, Cindy L, #108 @ ROOM 202, 09/18/1961

Order: Blood Sugar

Provider: Nancy Nurse Select

Pattern: BS TID (AM/Noon/PM) Select

☒ Verbal Order Type: Face to Face

Priority: Routine

Requested Dates and Shifts:

Start Date: 10-06-2026 Fri Shift: BS AM

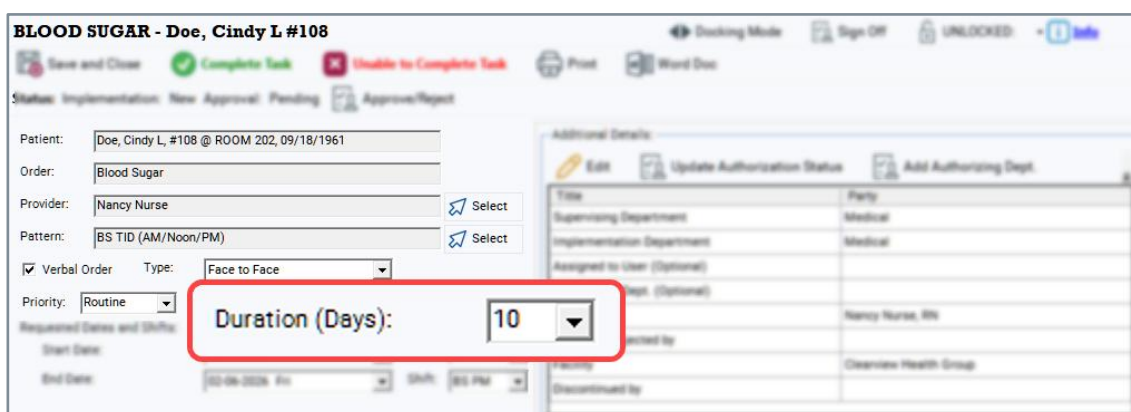
End Date: 10-06-2026 Fri Shift: BS PM

Additional Details:

Title	Party
Supervising Department	Medical
Implementation Department	Medical
Assigned to User (Optional)	Nancy Nurse, RN
Assigned to Dept. (Optional)	
Entered by	Nancy Nurse, RN
Approved/Rejected by	
Facility	Clearview Health Group
Discontinued by	

Duration

Use the **Duration** field to type or select the number of days an order remains active.



BLOOD SUGAR - Doe, Cindy L #108

Save and Close Complete Task Unable to Complete Task Print Word Doc

Status: Implementation New Approval Pending Approve/Reject

Patient: Doe, Cindy L, #108 @ ROOM 202, 09/18/1961

Order: Blood Sugar

Provider: Nancy Nurse Select

Pattern: BS TID (AM/Noon/PM) Select

☒ Verbal Order Type: Face to Face

Priority: Routine

Duration (Days): 10

Requested Dates and Shifts:

Start Date: 10-06-2026 Fri Shift: BS AM

End Date: 10-06-2026 Fri Shift: BS PM

Additional Details:

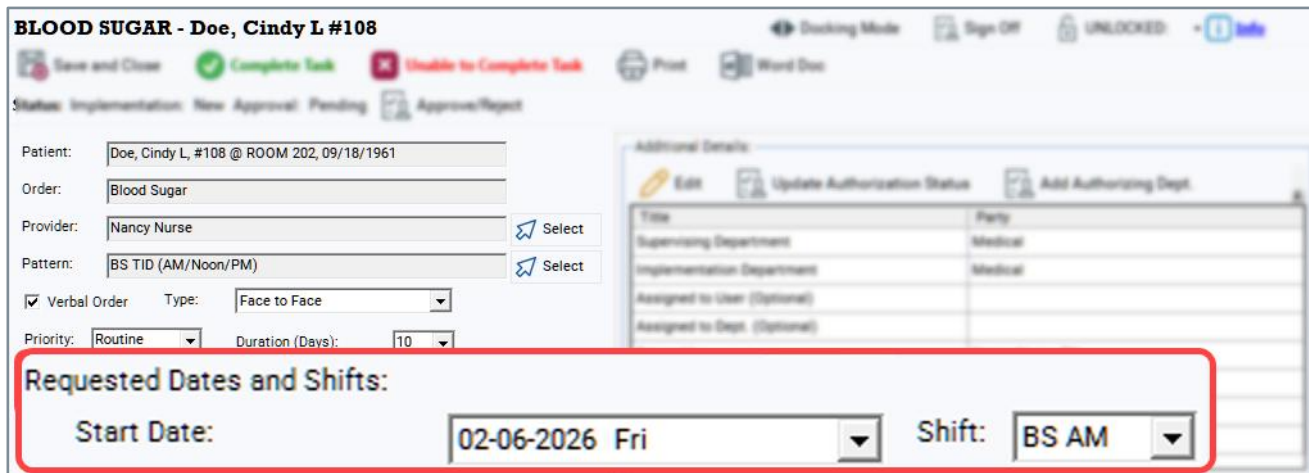
Title	Party
Supervising Department	Medical
Implementation Department	Medical
Assigned to User (Optional)	Nancy Nurse, RN
Assigned to Dept. (Optional)	
Entered by	Nancy Nurse, RN
Approved/Rejected by	
Facility	Clearview Health Group
Discontinued by	

Initiate Order

Requested Start Date and Shift

By default, the **Start Date** and **Shift** are set to today and the next scheduled shift.

Use the drop-down arrow to change either field as needed.



BLOOD SUGAR - Doe, Cindy L #108

Save and Close Complete Task Unable to Complete Task Print Word Doc

Status: Implementation: New Approval: Pending Approve/Reject

Patient: Doe, Cindy L, #108 @ ROOM 202, 09/18/1961

Order: Blood Sugar

Provider: Nancy Nurse Select

Pattern: BS TID (AM/Noon/PM) Select

☒ Verbal Order Type: Face to Face

Priority: Routine Duration (Days): 10

Requested Dates and Shifts:

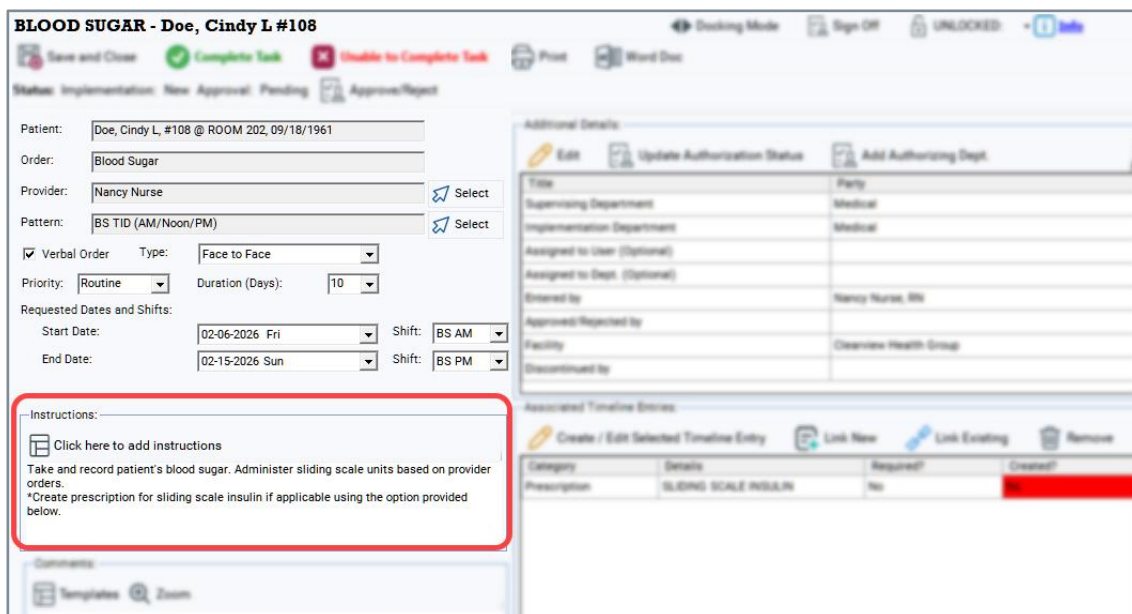
Start Date: 02-06-2026 Fri Shift: BS AM

Additional Details:

Title	Party
Supervising Department	Medical
Implementation Department	Medical
Assigned to User (Optional)	
Assigned to Dept. (Optional)	

Add Instructions

Review any pre-populated text in the Instructions field and add more details directly in this field as directed by the provider.



BLOOD SUGAR - Doe, Cindy L #108

Save and Close Complete Task Unable to Complete Task Print Word Doc

Status: Implementation: New Approval: Pending Approve/Reject

Patient: Doe, Cindy L, #108 @ ROOM 202, 09/18/1961

Order: Blood Sugar

Provider: Nancy Nurse Select

Pattern: BS TID (AM/Noon/PM) Select

☒ Verbal Order Type: Face to Face

Priority: Routine Duration (Days): 10

Requested Dates and Shifts:

Start Date: 02-06-2026 Fri Shift: BS AM

End Date: 02-15-2026 Sun Shift: BS PM

Instructions:

Click here to add instructions

Take and record patient's blood sugar. Administer sliding scale units based on provider orders.

*Create prescription for sliding scale insulin if applicable using the option provided below.

Comments:

Templates Zoom

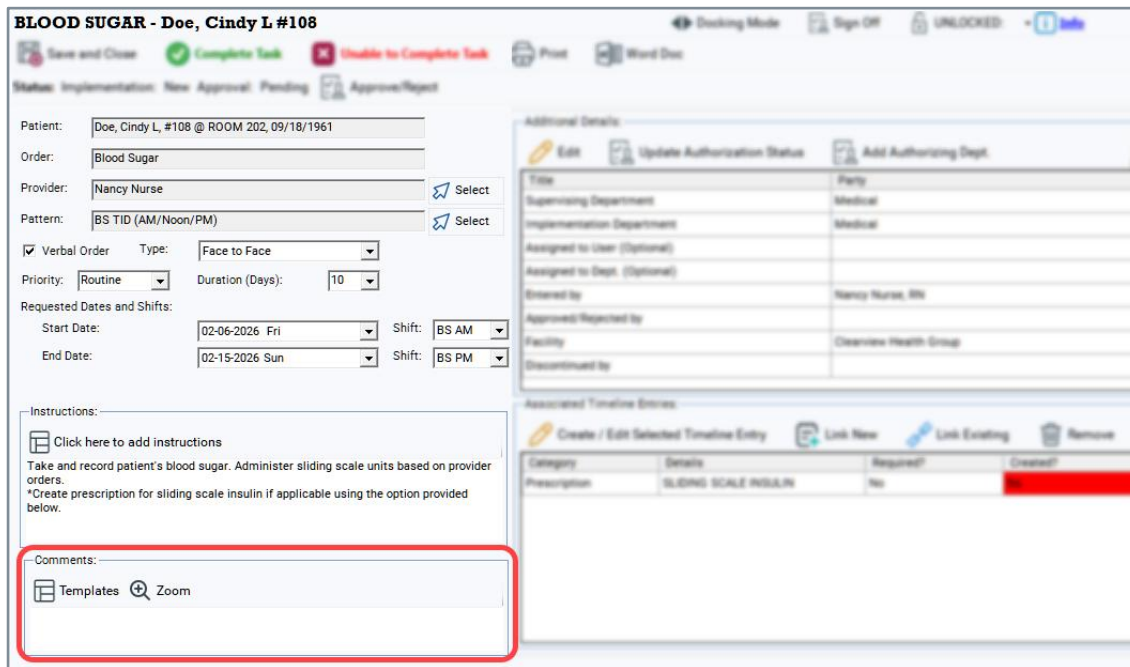
Associated Timeline Entries:

Category	Details	Required?	Created?
Prescription	SLIDING SCALE INSULIN	No	No

Initiate Order

Comments (optional)

Use the **Comments** field to add internal facility notes when needed.



BLOOD SUGAR - Doe, Cindy L #108

Save and Close Complete Task Unable to Complete Task Print Word Doc

Status: Implementation New Approval Pending Approve/Reject

Patient: Doe, Cindy L, #108 @ ROOM 202, 09/18/1961

Order: Blood Sugar

Provider: Nancy Nurse Select

Pattern: BS TID (AM/Noon/PM) Select

☒ Verbal Order Type: Face to Face

Priority: Routine Duration (Days): 10

Requested Dates and Shifts:

Start Date: 02-06-2026 Fri Shift: BS AM

End Date: 02-15-2026 Sun Shift: BS PM

Instructions:

Click here to add instructions

Take and record patient's blood sugar. Administer sliding scale units based on provider orders.

*Create prescription for sliding scale insulin if applicable using the option provided below.

Comments:

Templates Zoom

Additional Details:

Edit Update Authorization Status Add Authorizing Dept.

Title	Party
Supervising Department	Medical
Implementation Department	Medical
Assigned to User (Optional)	
Assigned to Dept. (Optional)	
Entered by	Nancy Nurse, RN
Approved/Rejected by	
Facility	Cleaview Health Group
Discontinued by	

Associated Timeline Entries:

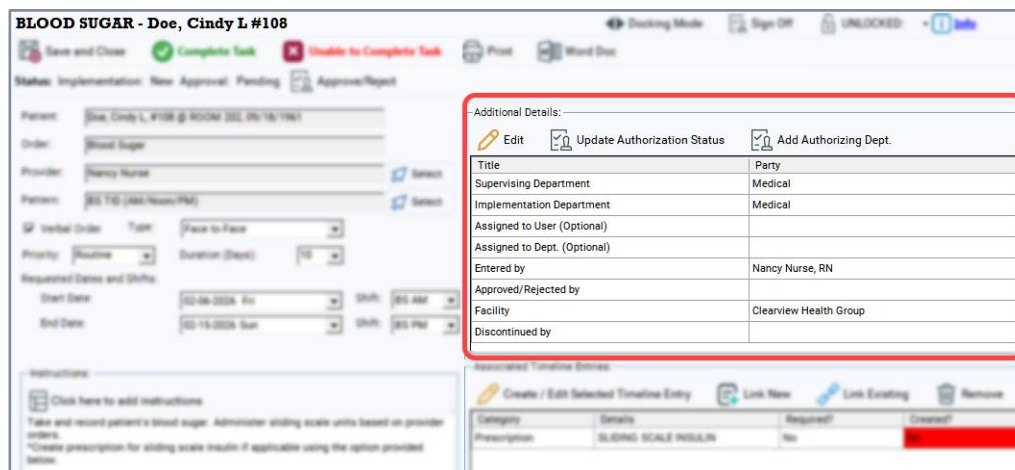
Create / Edit Selected Timeline Entry Link New Link Existing Remove

Category	Details	Required?	Created?
Prescription	SLIDING SCALE INSULIN	No	No

Additional Details

(No action required)

For details about the fields in this section, see the [Additional Details](#) reference.



BLOOD SUGAR - Doe, Cindy L #108

Save and Close Complete Task Unable to Complete Task Print Word Doc

Status: Implementation New Approval Pending Approve/Reject

Patient: Doe, Cindy L, #108 @ ROOM 202, 09/18/1961

Order: Blood Sugar

Provider: Nancy Nurse Select

Pattern: BS TID (AM/Noon/PM) Select

☒ Verbal Order Type: Face to Face

Priority: Routine Duration (Days): 10

Requested Dates and Shifts:

Start Date: 02-06-2026 Fri Shift: BS AM

End Date: 02-15-2026 Sun Shift: BS PM

Instructions:

Click here to add instructions

Take and record patient's blood sugar. Administer sliding scale units based on provider orders.

*Create prescription for sliding scale insulin if applicable using the option provided below.

Additional Details:

Edit Update Authorization Status Add Authorizing Dept.

Title	Party
Supervising Department	Medical
Implementation Department	Medical
Assigned to User (Optional)	
Assigned to Dept. (Optional)	
Entered by	Nancy Nurse, RN
Approved/Rejected by	
Facility	Cleaview Health Group
Discontinued by	

Associated Timeline Entries:

Create / Edit Selected Timeline Entry Link New Link Existing Remove

Category	Details	Required?	Created?
Prescription	SLIDING SCALE INSULIN	No	No

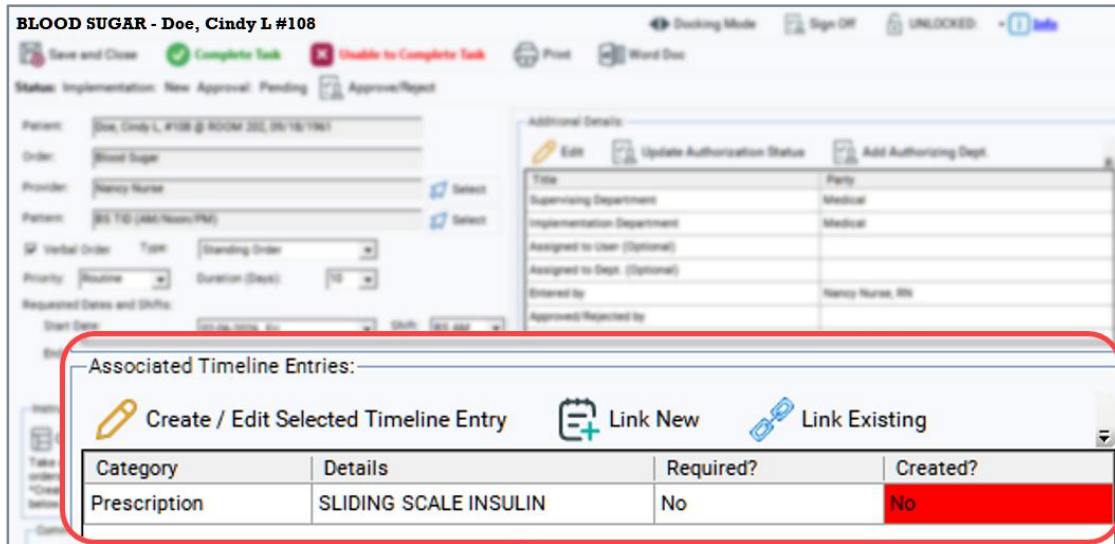
Initiate Order

Associated Timeline Entries

Some orders may include Associated Timeline Entries. Review this section for required action.

If an entry shows **Required? = Yes**, it must be completed before saving the order.

For details about the fields in this section, see the [Associated Timeline Entries](#) reference.



BLOOD SUGAR - Doe, Cindy L #108

Save and Close Complete Task Unable to Complete Task Print Word Doc

Status: Implementation: New Approval: Pending Approve/Reject

Patient: Doe, Cindy L #108 @ ROOM 202, 05/18/1961

Order: Blood Sugar

Provider: Nancy Nurse

Patient: B2 T10 (Add Nurse PM)

QIP Verbal Order Type: Standing Order

Priority: Routine Duration (Days): 10

Requested Dates and Shifts: Start Date: 05/18/2019, 8:00 AM Shift: 800 AM

Additional Details

Edit Update Authorization Status Add Authorizing Dept

Table:

Title	Party
Supervising Department	Medical
Implementation Department	Medical
Assigned to User (Optional)	
Assigned to Dept. (Optional)	
Entered by	Nancy Nurse, RN
Approved/Rejected by	

Associated Timeline Entries:

Create / Edit Selected Timeline Entry Link New Link Existing

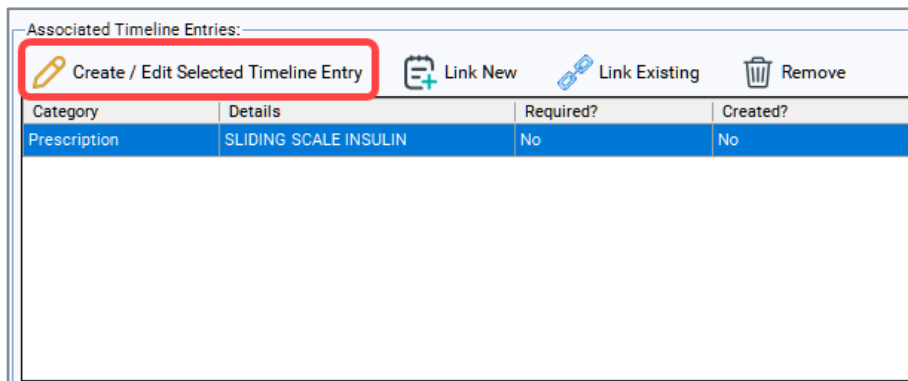
Category	Details	Required?	Created?
Prescription	SLIDING SCALE INSULIN	No	No

Create/Edit Selected Timeline Entry (if required)

Highlight the entry and click **Create/Edit Selected Timeline Entry** to complete the required information.

If **Required? = No**, no action is needed. Continue to save the order.

Tip: Fields shown vary based on the type of timeline entry associated.



Associated Timeline Entries:

Create / Edit Selected Timeline Entry Link New Link Existing Remove

Category	Details	Required?	Created?
Prescription	SLIDING SCALE INSULIN	No	No

Initiate Order

Save the Order

Review the details for accuracy. Click **Save and Close** to complete the order.

BLOOD SUGAR - Doe, Cindy L #108 Tracking Mode Sign Off UNLOCKED Info

 **Save and Close** Unable to Complete Task Print Word Doc

STATUS: NEW PRESCRIPTION: FOUR:00 AM SHIFT Implementation: Pending Approval: Pending Approve/Reject

Patient:

Order:

Provider: Select

Pattern: Select

☒ Verbal Order Type:

Priority: Duration (Days):

Requested Dates and Shifts:

Start Date: Shift:

End Date: Shift:

Instructions:

 Click here to add instructions

Take and record patient's blood sugar. Administer sliding scale units based on provider orders.
*Create prescription for sliding scale insulin if applicable using the option provided below.

Additional Details:

Edit Update Authorization Status Add Authorizing Dept

Title	Party
Supervising Department	Medical
Implementation Department	Medical
Assigned to User (Optional)	
Assigned to Dept. (Optional)	
Entered by	Nancy Nurse, RN
Approved/Rejected by	
Facility	Cleareview Health Group
Discontinued by	

Associated Timeline Entries:

Create / Edit Selected Timeline Entry Link New Link Existing

Category	Details	Required?	Created?
Prescription	SLIDING SCALE INSULIN	No	No

Initiate Order

Single Treatment Orders

Single Treatment Orders are used for actions performed once and then closed, such as visits, lab draws, chart reviews, or nurse sick calls.

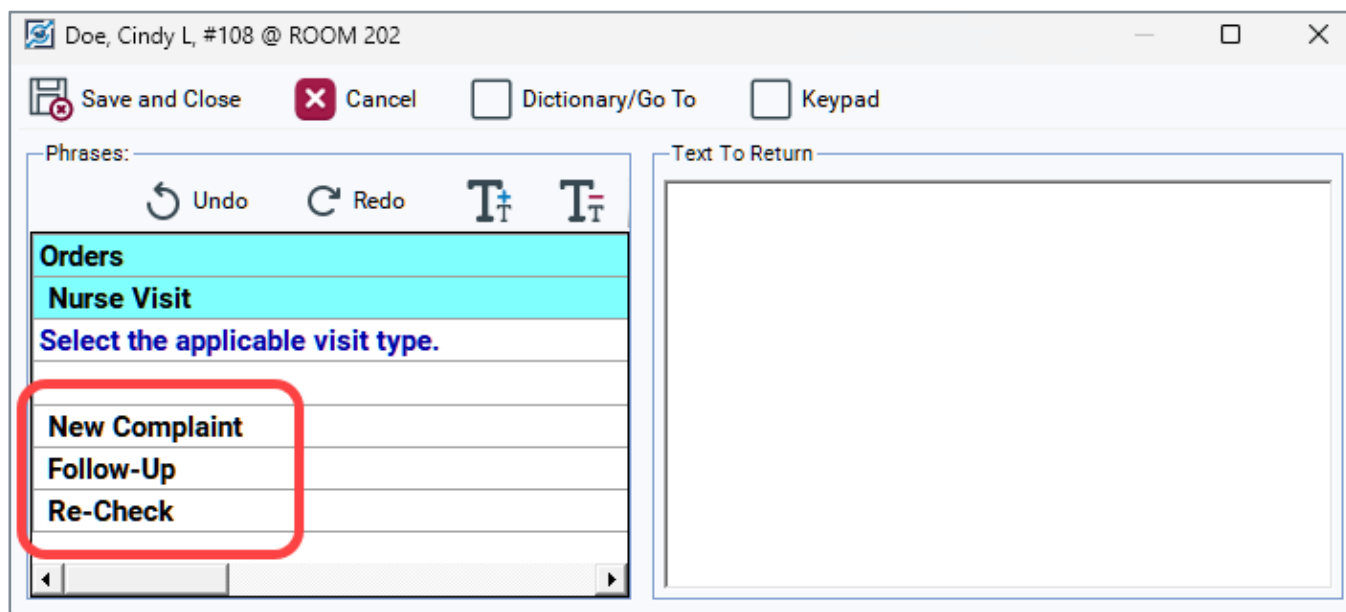
In this example, a **Nurse Sick Call Visit** was selected from the Search Orders screen.

Order Instructions

Some Single Treatment Orders include an instructional template.

Review the text shown in blue, then select the appropriate options in black.

In this example, a **New Complaint** is selected.



Doe, Cindy L, #108 @ ROOM 202

Phrases:

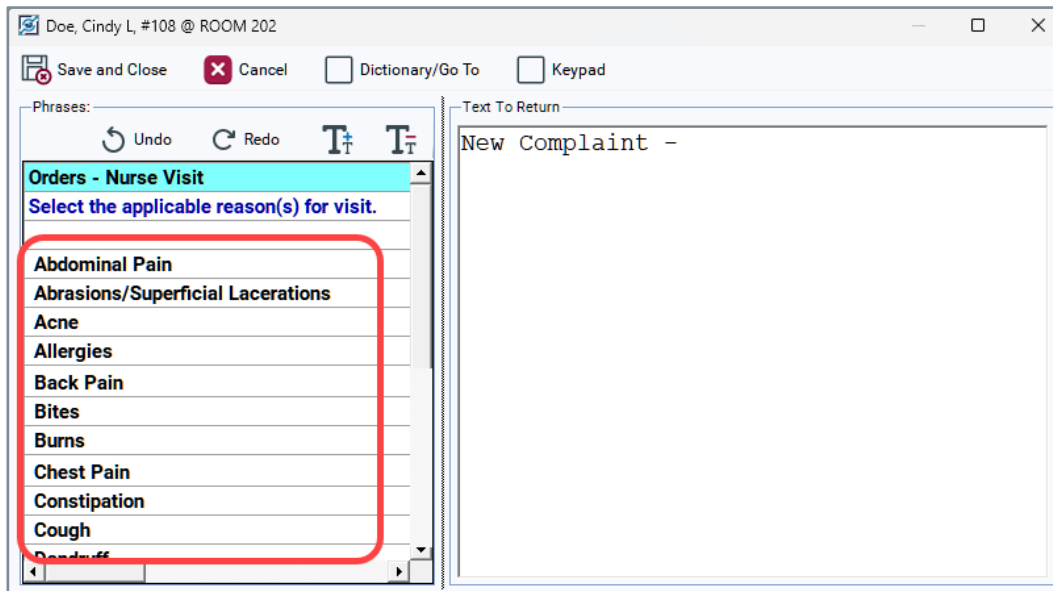
Undo Redo T₊ T₋

Orders
Nurse Visit
Select the applicable visit type.
New Complaint
Follow-Up
Re-Check

Text To Return

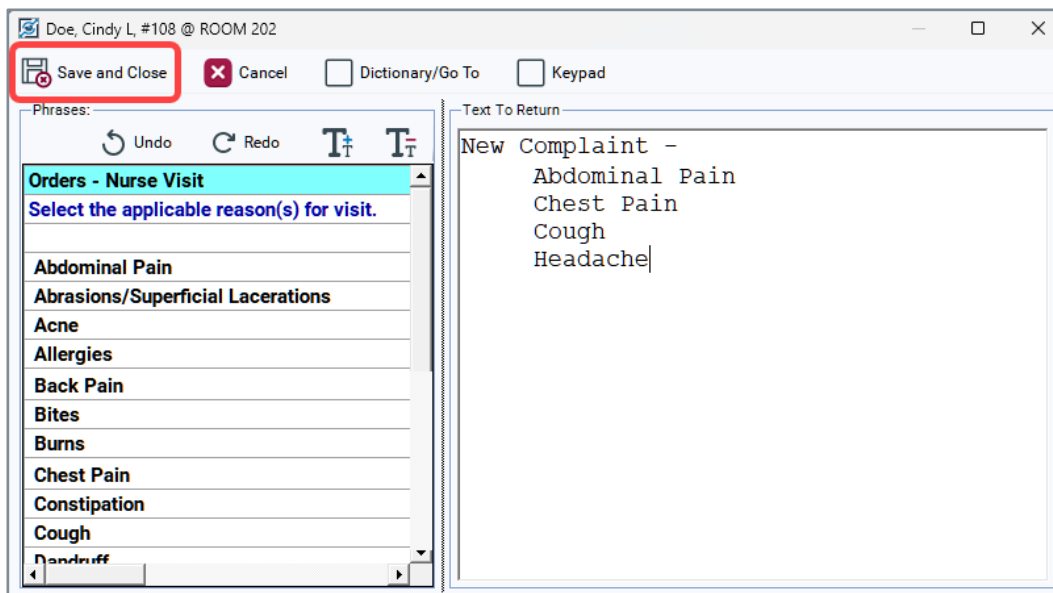
Initiate Order

Select the reason(s) for the visit. As you make selections, they appear below **New Complaint**.



The screenshot shows a window titled "Doe, Cindy L, #108 @ ROOM 202". At the top, there are buttons for "Save and Close", "Cancel", "Dictionary/Go To", and "Keypad". Below these are "Phrases:" and "Text To Return" sections. The "Phrases:" section has "Undo" and "Redo" buttons and a list of reasons for visit. The list is titled "Orders - Nurse Visit" and "Select the applicable reason(s) for visit." The list includes: Abdominal Pain, Abrasions/Superficial Lacerations, Acne, Allergies, Back Pain, Bites, Burns, Chest Pain, Constipation, Cough, and Headache. A red box highlights the list of reasons. The "Text To Return" section is empty.

When finished, click **Save and Close**.

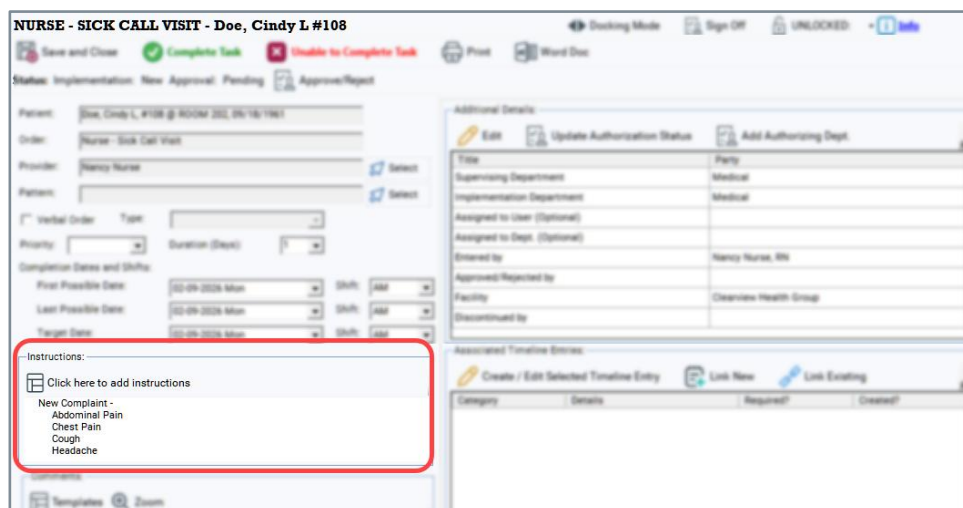


The screenshot shows the same window as before, but now the "Save and Close" button is highlighted with a red box. The "Text To Return" section now contains the selected reasons: Abdominal Pain, Chest Pain, Cough, and Headache. The list of reasons in the "Phrases:" section is still visible.

After the template is saved, the Order Screen opens with the patient's name and order type prepopulated.

Initiate Order

The selections made in the template appear in the Instructions field.



NURSE - SICK CALL VISIT - Doe, Cindy L #108

Save and Close Complete Task Unable to Complete Task Print Word Doc

Status: Implementation New Approval Pending Approve/Reject

Patient: Doe, Cindy L, #108 @ ROOM 202, 09/18/1961

Order: Nurse - Sick Call Visit

Provider: Nancy Nurse

Pattern: [Select]

Verbal Order: ☐ Type: [Select]

Priority: [Select] Duration (Days): [Select]

Completion Dates and Shifts:

First Possible Date: 02-09-2026 Mon Shift: AM

Last Possible Date: 02-09-2026 Mon Shift: AM

Target Date: 02-09-2026 Mon Shift: AM

Instructions:

Click here to add instructions

New Complaint -

- Abdominal Pain
- Chest Pain
- Cough
- Headache

Additional Details:

Edit Update Authorization Status Add Authorizing Dept

Title	Party
Supervising Department	Medical
Implementation Department	Medical
Assigned to User (Optional)	
Assigned to Dept. (Optional)	
Entered by	Nancy Nurse, RN
Approved/Rejected by	
Facility	Clearview Health Group
Discontinued by	

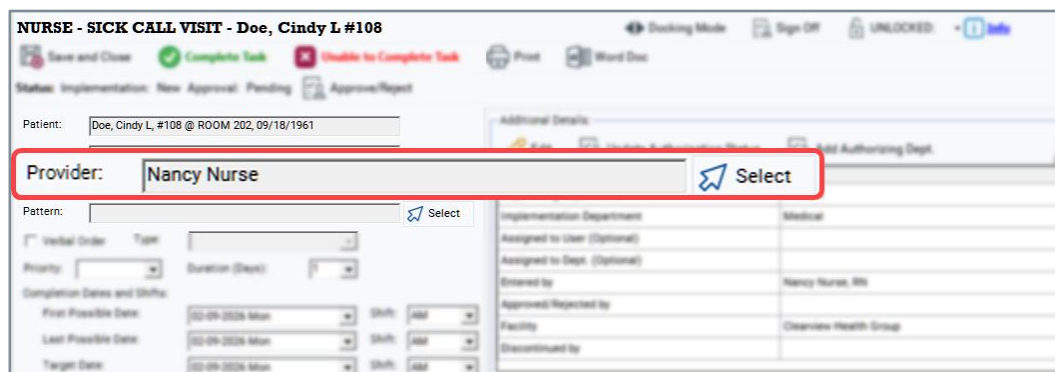
Associated Timeline Entries:

Create / Edit Selected Timeline Entry Link New Link Existing

Category	Details	Required?	Created?
----------	---------	-----------	----------

Select Provider

The Provider field is also prepopulated. Click **Select** to assign the ordering provider.



NURSE - SICK CALL VISIT - Doe, Cindy L #108

Save and Close Complete Task Unable to Complete Task Print Word Doc

Status: Implementation New Approval Pending Approve/Reject

Patient: Doe, Cindy L, #108 @ ROOM 202, 09/18/1961

Provider: Nancy Nurse [Select]

Pattern: [Select]

Verbal Order: ☐ Type: [Select]

Priority: [Select] Duration (Days): [Select]

Completion Dates and Shifts:

First Possible Date: 02-09-2026 Mon Shift: AM

Last Possible Date: 02-09-2026 Mon Shift: AM

Target Date: 02-09-2026 Mon Shift: AM

Additional Details:

Edit Update Authorization Status Add Authorizing Dept

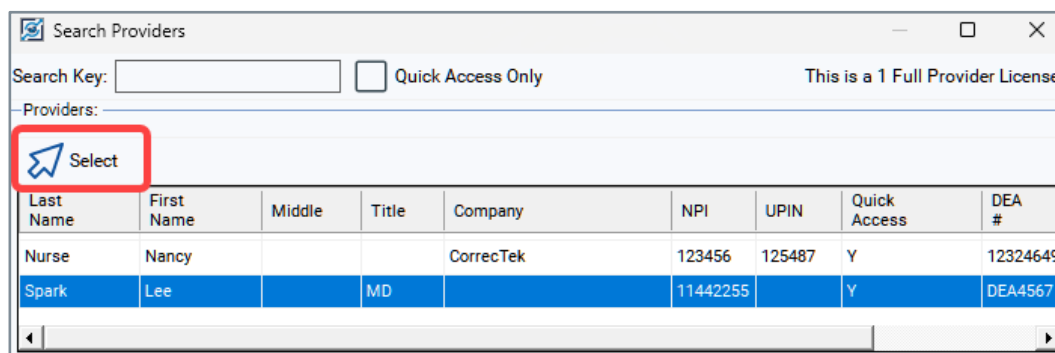
Title	Party
Supervising Department	Medical
Implementation Department	Medical
Assigned to User (Optional)	
Assigned to Dept. (Optional)	
Entered by	Nancy Nurse, RN
Approved/Rejected by	
Facility	Clearview Health Group
Discontinued by	

Associated Timeline Entries:

Create / Edit Selected Timeline Entry Link New Link Existing

Category	Details	Required?	Created?
----------	---------	-----------	----------

The Search Providers window will open. Highlight the applicable provider and click **Select**.



Search Providers

Search Key: [Text Box] Quick Access Only This is a 1 Full Provider License.

Providers:

[Select]

Last Name	First Name	Middle	Title	Company	NPI	UPIN	Quick Access	DEA #
Nurse	Nancy			CorrecTek	123456	125487	Y	12324649
Spark	Lee		MD		11442255		Y	DEA4567

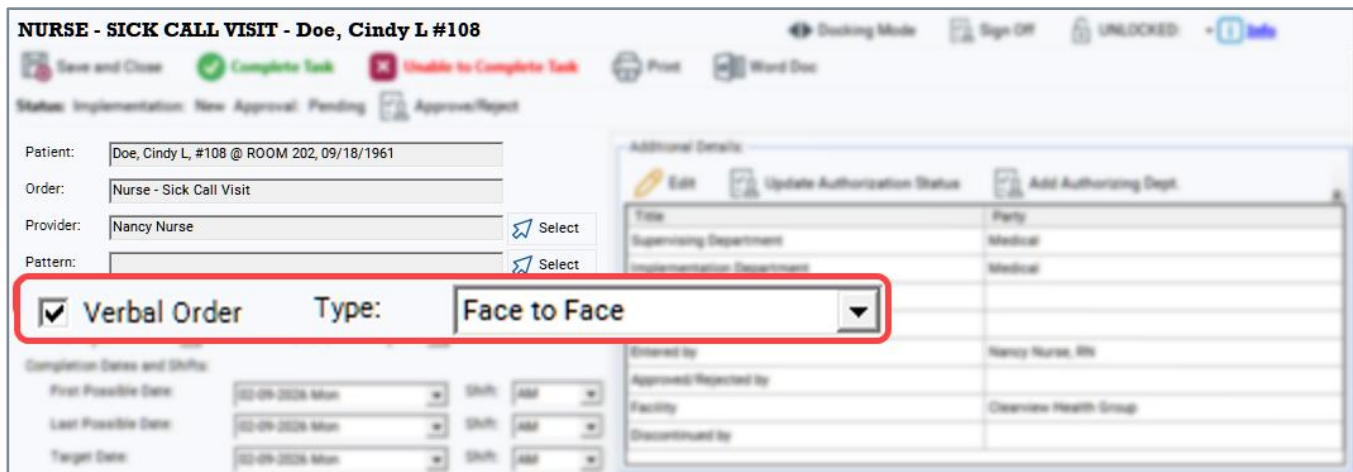
Initiate Order

Verbal Order

Use the **Verbal Order** option when the order is based on a verbal or administrative instruction from a provider.

Tip: If the order is created as a Verbal Order, the checkbox may be automatically selected.

Once checked, use the **Type** field to select the associated verbal order type from the drop-down.



NURSE - SICK CALL VISIT - Doe, Cindy L #108

Save and Close Complete Task Unable to Complete Task Print Word Doc

Status: Implementation: New Approval: Pending Approve/Reject

Patient: Doe, Cindy L, #108 @ ROOM 202, 09/18/1961

Order: Nurse - Sick Call Visit

Provider: Nancy Nurse

Pattern:

☒ Verbal Order Type: Face to Face

Completion Dates and Shifts

First Possible Date: 02-09-2026 Mon Shift: Add

Last Possible Date: 02-09-2026 Mon Shift: Add

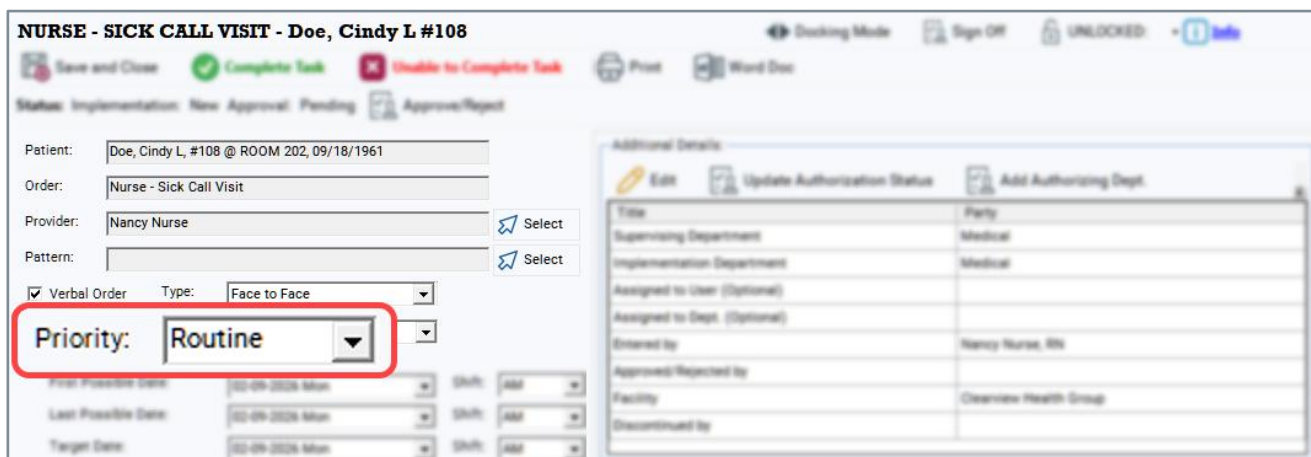
Target Date: 02-09-2026 Mon Shift: Add

Additional Details

Title	Party
Supervising Department	Medical
Implementation Department	Medical
Entered by	Nancy Nurse, RN
Approved/Rejected by	
Facility	Clearview Health Group
Discontinued by	

Priority

Use the **Priority** field to set how urgently the order should be completed.



NURSE - SICK CALL VISIT - Doe, Cindy L #108

Save and Close Complete Task Unable to Complete Task Print Word Doc

Status: Implementation: New Approval: Pending Approve/Reject

Patient: Doe, Cindy L, #108 @ ROOM 202, 09/18/1961

Order: Nurse - Sick Call Visit

Provider: Nancy Nurse

Pattern:

☒ Verbal Order Type: Face to Face

Priority: Routine

Completion Dates and Shifts

First Possible Date: 02-09-2026 Mon Shift: Add

Last Possible Date: 02-09-2026 Mon Shift: Add

Target Date: 02-09-2026 Mon Shift: Add

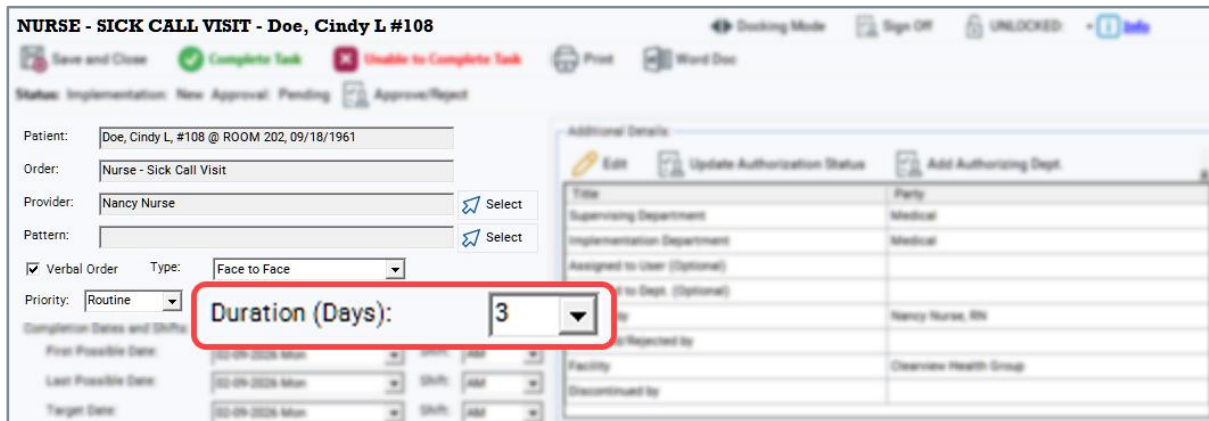
Additional Details

Title	Party
Supervising Department	Medical
Implementation Department	Medical
Assigned to User (Optional)	
Assigned to Dept. (Optional)	
Entered by	Nancy Nurse, RN
Approved/Rejected by	
Facility	Clearview Health Group
Discontinued by	

Initiate Order

Duration

Use the **Duration** field to type or select the number of days an order remains active.



NURSE - SICK CALL VISIT - Doe, Cindy L #108

Save and Close Complete Task Unable to Complete Task Print Word Doc

Status: Implementation: New Approval: Pending Approve/Reject

Patient: Doe, Cindy L, #108 @ ROOM 202, 09/18/1961

Order: Nurse - Sick Call Visit

Provider: Nancy Nurse Select

Pattern: Select

☒ Verbal Order Type: Face to Face

Priority: Routine

Duration (Days): 3

Completion Dates and Shifts:

First Possible Date: 02-09-2026 Mon Shift: AM

Last Possible Date: 02-09-2026 Mon Shift: AM

Target Date: 02-09-2026 Mon Shift: AM

Additional Details:

Title	Party
Supervising Department	Medical
Implementation Department	Medical
Assigned to User (Optional)	
Assigned to Dept. (Optional)	
Entered by	Nancy Nurse, RN
Approved/Rejected by	
Facility	Clearview Health Group
Discontinued by	

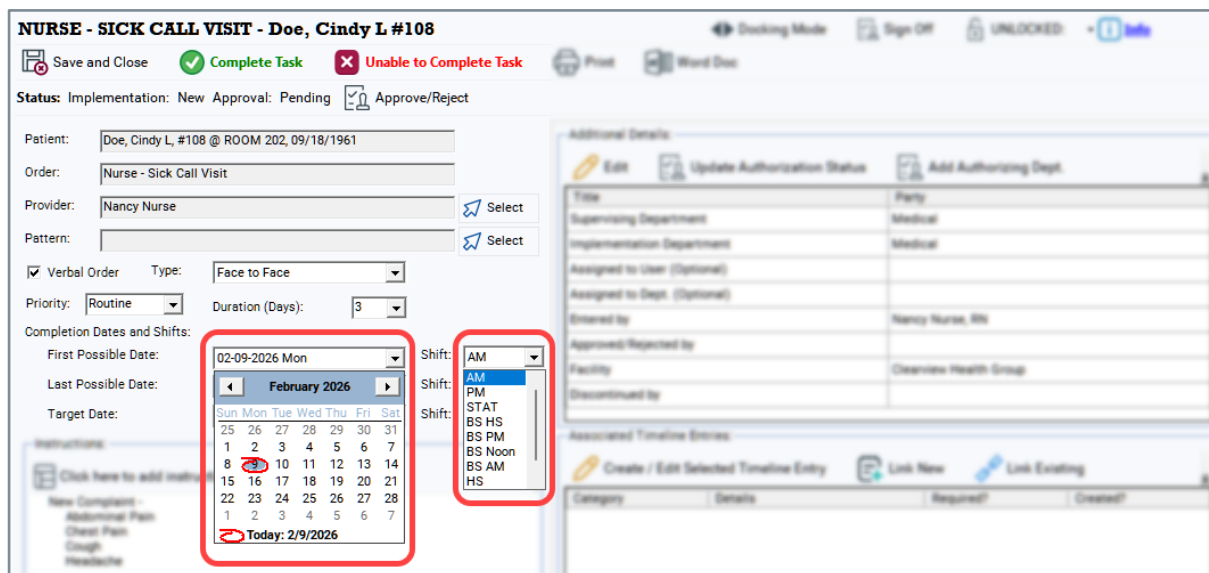
Completion Dates and Shifts

Use the **Completion Dates and Shifts** fields to set when the order appears and is completed.

First Possible Date

By default, **First Possible Date** and **Shift** are set to today and the next scheduled shift.

To change either value, use the drop-down arrows.



NURSE - SICK CALL VISIT - Doe, Cindy L #108

Save and Close Complete Task Unable to Complete Task Print Word Doc

Status: Implementation: New Approval: Pending Approve/Reject

Patient: Doe, Cindy L, #108 @ ROOM 202, 09/18/1961

Order: Nurse - Sick Call Visit

Provider: Nancy Nurse Select

Pattern: Select

☒ Verbal Order Type: Face to Face

Priority: Routine

Duration (Days): 3

Completion Dates and Shifts:

First Possible Date: 02-09-2026 Mon Shift: AM

Last Possible Date: 02-09-2026 Mon Shift: AM

Target Date: 02-09-2026 Mon Shift: AM

Additional Details:

Title	Party
Supervising Department	Medical
Implementation Department	Medical
Assigned to User (Optional)	
Assigned to Dept. (Optional)	
Entered by	Nancy Nurse, RN
Approved/Rejected by	
Facility	Clearview Health Group
Discontinued by	

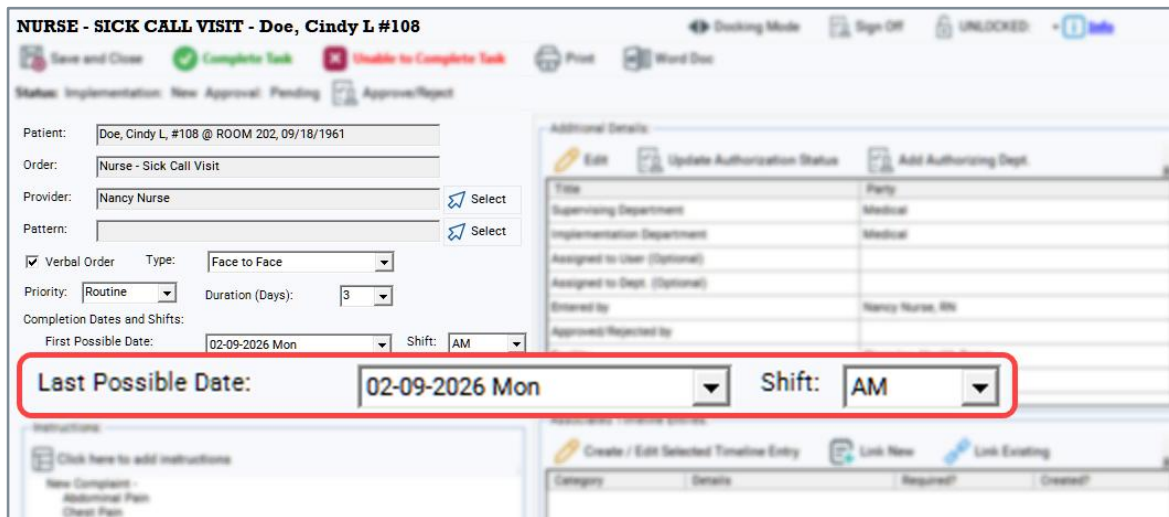
Associated Timeline Entries:

Category	Details	Required?	Created?

Initiate Order

Last Possible Date

Last Possible Date is set automatically based on the selected duration.



NURSE - SICK CALL VISIT - Doe, Cindy L #108

Save and Close Complete Task Unable to Complete Task Print Word Doc

Status: Implementation: New Approval: Pending Approve/Reject

Patient: Doe, Cindy L, #108 @ ROOM 202, 09/18/1961

Order: Nurse - Sick Call Visit

Provider: Nancy Nurse Select

Pattern: Select

☒ Verbal Order Type: Face to Face

Priority: Routine Duration (Days): 3

Completion Dates and Shifts:

First Possible Date: 02-09-2026 Mon Shift: AM

Last Possible Date: 02-09-2026 Mon Shift: AM

Click here to add instructions

New Complaint - Abnormal Pain Chest Pain

Additional Details:

Edit Update Authorization Status Add Authorizing Dept.

Title	Party
Supervising Department	Medical
Implementation Department	Medical
Assigned to User (Optional)	
Assigned to Dept. (Optional)	
Entered by	Nancy Nurse, RN
Approved/Rejected by	
Facility	Cleveland Health Group
Discontinued by	

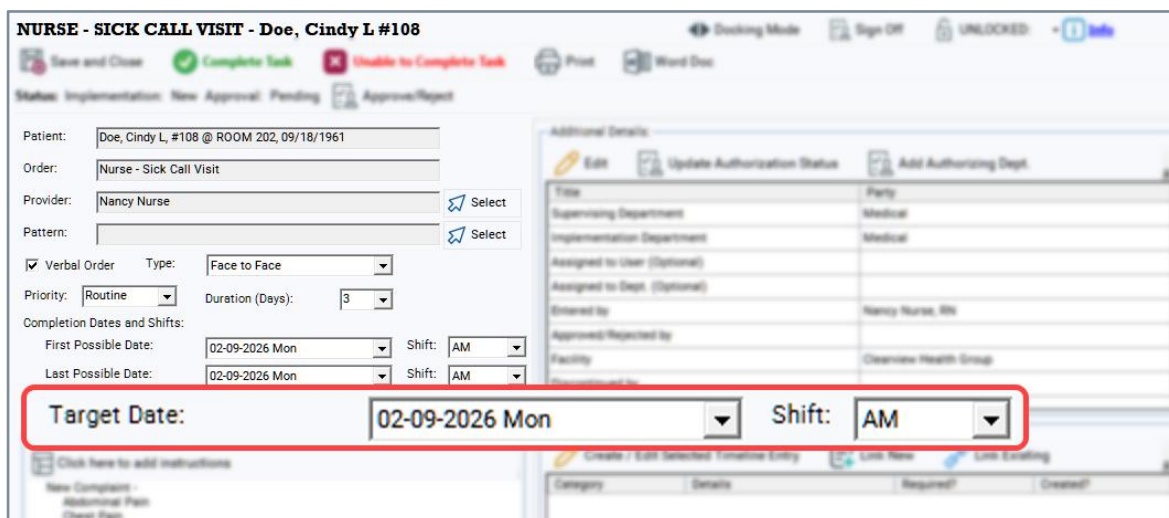
Create / Edit Selected Timeline Entry Link New Link Existing

Category	Details	Required?	Created?
----------	---------	-----------	----------

Target Date

By default, Target Date matches the First Possible Date.

To change it, use the drop-down arrow and select a new date.



NURSE - SICK CALL VISIT - Doe, Cindy L #108

Save and Close Complete Task Unable to Complete Task Print Word Doc

Status: Implementation: New Approval: Pending Approve/Reject

Patient: Doe, Cindy L, #108 @ ROOM 202, 09/18/1961

Order: Nurse - Sick Call Visit

Provider: Nancy Nurse Select

Pattern: Select

☒ Verbal Order Type: Face to Face

Priority: Routine Duration (Days): 3

Completion Dates and Shifts:

First Possible Date: 02-09-2026 Mon Shift: AM

Last Possible Date: 02-09-2026 Mon Shift: AM

Target Date: 02-09-2026 Mon Shift: AM

Click here to add instructions

New Complaint - Abnormal Pain Chest Pain

Additional Details:

Edit Update Authorization Status Add Authorizing Dept.

Title	Party
Supervising Department	Medical
Implementation Department	Medical
Assigned to User (Optional)	
Assigned to Dept. (Optional)	
Entered by	Nancy Nurse, RN
Approved/Rejected by	
Facility	Cleveland Health Group
Discontinued by	

Create / Edit Selected Timeline Entry Link New Link Existing

Category	Details	Required?	Created?
----------	---------	-----------	----------

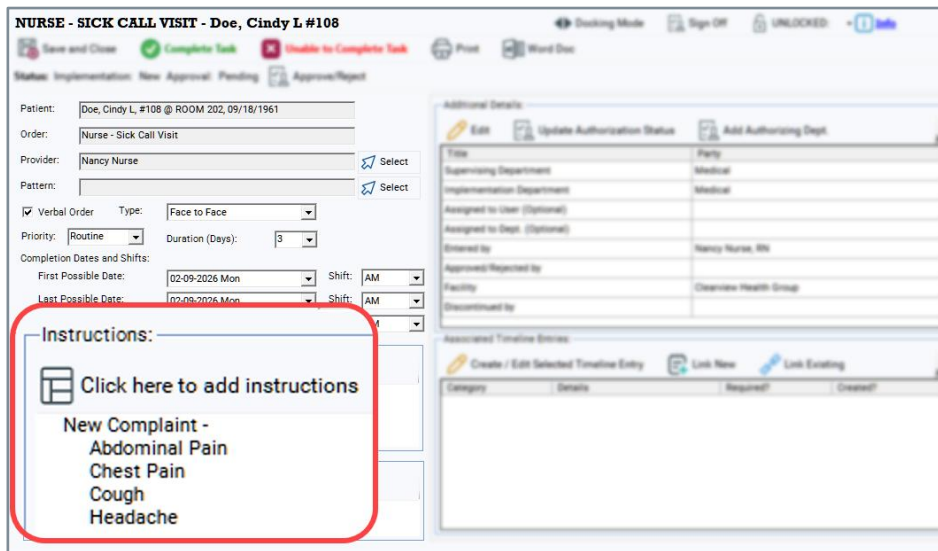
Add Instructions

Review the information populated in the Instructions field.

If more detail is needed, **type them directly in this field** as directed by the provider.

Initiate Order

Tip: For Single Treatment Orders, this field may already include information based on the selected visit reason.



NURSE - SICK CALL VISIT - Doe, Cindy L #108

Save and Close Complete Task Unable to Complete Task Print Word Doc

Status: Implementation New Approval Pending Approve/Reject

Patient: Doe, Cindy L, #108 @ ROOM 202, 09/18/1961

Order: Nurse - Sick Call Visit

Provider: Nancy Nurse Select

Pattern: Select

☒ Verbal Order Type: Face to Face

Priority: Routine Duration (Days): 3

Completion Dates and Shifts:

First Possible Date: 02-09-2026 Mon Shift: AM

Last Possible Date: 02-09-2026 Mon Shift: AM

Instructions:

Click here to add instructions

New Complaint -
Abdominal Pain
Chest Pain
Cough
Headache

Additional Details:

Edit Update Authorization Status Add Authorizing Dept

Title	Party
Supervising Department	Medical
Implementation Department	Medical
Assigned to User (Optional)	
Assigned to Dept. (Optional)	
Entered by	Nancy Nurse, RN
Approved/Reported by	
Facility	Cleanview Health Group
Discontinued by	

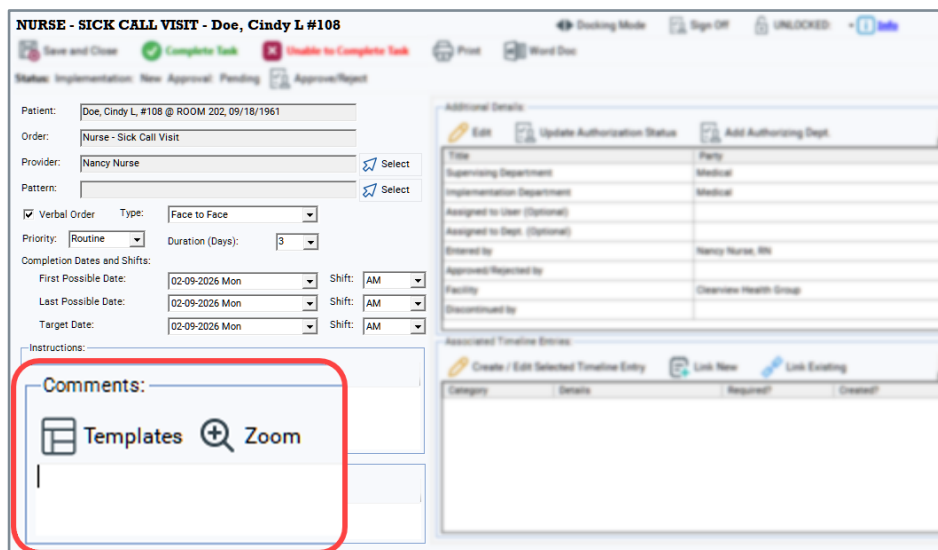
Associated Timeline Entries:

Create / Edit Selected Timeline Entry Link New Link Existing

Category	Details	Required?	Created?
----------	---------	-----------	----------

Comments (optional)

Use the **Comments** field to add internal facility notes when needed.



NURSE - SICK CALL VISIT - Doe, Cindy L #108

Save and Close Complete Task Unable to Complete Task Print Word Doc

Status: Implementation New Approval Pending Approve/Reject

Patient: Doe, Cindy L, #108 @ ROOM 202, 09/18/1961

Order: Nurse - Sick Call Visit

Provider: Nancy Nurse Select

Pattern: Select

☒ Verbal Order Type: Face to Face

Priority: Routine Duration (Days): 3

Completion Dates and Shifts:

First Possible Date: 02-09-2026 Mon Shift: AM

Last Possible Date: 02-09-2026 Mon Shift: AM

Target Date: 02-09-2026 Mon Shift: AM

Instructions:

Comments:

Templates Zoom

Additional Details:

Edit Update Authorization Status Add Authorizing Dept

Title	Party
Supervising Department	Medical
Implementation Department	Medical
Assigned to User (Optional)	
Assigned to Dept. (Optional)	
Entered by	Nancy Nurse, RN
Approved/Reported by	
Facility	Cleanview Health Group
Discontinued by	

Associated Timeline Entries:

Create / Edit Selected Timeline Entry Link New Link Existing

Category	Details	Required?	Created?
----------	---------	-----------	----------

Associated Timeline Entries

Some orders may include associated timeline entries.

If an entry shows **Required? = Yes**, it must be completed before saving the order.

Initiate Order

For details about the fields in this section, see the [Associated Timeline Entries](#) reference.

NURSE - SICK CALL VISIT - Doe, Cindy L #108

Save and Close Complete Task Unable to Complete Task Print Word Doc

Status: Implementation New Approval Pending Approve/Reject

Patient: Doe, Cindy L, #108 @ ROOM 202, 06/16/1961

Order: Nurse - Sick Call Visit

Provider: Nancy Nurse

Verbal Order Type: Face to Face

Priority: Routine Duration (Days): 5

Completion Dates and Shifts:

Additional Details:

Title	Party
Supervising Department	Medical
Implementation Department	Medical
Assigned to User (Optional)	
Assigned to Dept. (Optional)	
Entered by	Nancy Nurse, RN
Approved/Rejected by	

Associated Timeline Entries:

Create / Edit Selected Timeline Entry Link New Link Existing

Category	Details	Required?	Created?
----------	---------	-----------	----------

Save the Order

Review the details for accuracy. Click **Save and Close** when complete.

NURSE - SICK CALL VISIT - Doe, Cindy L #108

Save and Close Unable to Complete Task Print Word Doc

Status: Implementation New Approval Pending Approve/Reject

Patient: Doe, Cindy L, #108 @ ROOM 202, 06/16/1961

Order: Nurse - Sick Call Visit

Provider: Nancy Nurse

Verbal Order Type: Face to Face

Priority: Routine Duration (Days): 5

Completion Dates and Shifts:

First Possible Date: 02-09-2026 Mon Shift: AM

Last Possible Date: 02-09-2026 Mon Shift: AM

Target Date: 02-09-2026 Mon Shift: AM

Instructions:

Click here to add instructions

New Complaints:

- Abdominal Pain
- Chest Pain
- Cough
- Headache

Comments:

Templates Zoom

Additional Details:

Title	Party
Supervising Department	Medical
Implementation Department	Medical
Assigned to User (Optional)	
Assigned to Dept. (Optional)	
Entered by	Nancy Nurse, RN
Approved/Rejected by	
Facility	Clearview Health Group
Discontinued by	

Associated Timeline Entries:

Create / Edit Selected Timeline Entry Link New Link Existing

Category	Details	Required?	Created?
----------	---------	-----------	----------

Initiate Order



Reference Page

Additional Details

Supervising Department: Indicates which department can approve and/or discontinue the order.

Implementation Department: Indicates which department completes the order.

Assigned to User (Optional): Defaults to blank. Displays the user assigned to the order, if applicable.

Assigned to Dept. (Optional): Defaults to blank. Displays the department assigned to the order, if applicable.

Entered by: Defaults to the user initiating the order.

Approved/Rejected by: Remains blank until the provider approves or rejects the order.

Facility: Defaults to the user's current facility.

Discontinued by: Remains blank while the order is active. Displays the user who discontinued the order.

Return to [Additional Details](#) section.

Associated Timeline Entries

Category: Identifies the type of timeline entry. E.g. Prescription

Details: Displays the specific item associated with the entry. E.g. medication name or document name

Required?: Indicates whether the entry must be created before the order can be saved.

Created?: Shows whether the entry has been created (Yes or No).

Return to [Associated Timeline Entries](#) section.