



Last Updated: 5/27/22

## Toolkit Overview and Instructions

This document outlines the processes necessary to order, administer and update Infusion Therapy Plans. Review the topics then click the link for instructions about the topic.

## Infusion Therapy Plan Overview

IV medications given in the infusion therapy clinic (referred to as ITC (infusion therapy center) or AIC (adult infusion center) depending on location) are ordered through therapy plans. Therapy plan orders are signed and held until the day of treatment. When the patient arrives, the nurse can begin the treatment and release the orders. Once therapy is completed the orders reset for the next treatment.

| Infusion Therapy Plan Resources |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
|---------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Topic                           | <a href="#">Order an Infusion Therapy Plan</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
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| Topic                           | <a href="#">Order an Infusion Therapy Plan for Unlisted Medications</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
|                                 | <ul style="list-style-type: none"> <li><a href="#">Unlisted Medication Infusion Therapy Plan</a></li> <li><a href="#">Appointment Request Order Details</a></li> <li><a href="#">Add the Medication</a></li> <li><a href="#">Add an Unable to Find Medication</a></li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| Topic                           | <a href="#">Order an Infusion Therapy Plan for External Infusion Center</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
|                                 | <ul style="list-style-type: none"> <li><a href="#">Order and Print the Infusion Therapy Plan</a></li> <li><a href="#">View and Print the Infusion Therapy Plan in Medications &amp; Orders</a></li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| Topic                           | <a href="#">Infusion Therapy Plan Actions</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
|                                 | <ul style="list-style-type: none"> <li><a href="#">Actions Drop-Down</a></li> <li><a href="#">Completed Orders vs Removed Orders</a></li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |

|       |                                                                                                                                                                                                                                                                                                                                           |
|-------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Topic | <a href="#">Hold an Infusion Therapy Plan</a>                                                                                                                                                                                                                                                                                             |
|       | <ul style="list-style-type: none"> <li>• <a href="#">Place an Infusion Therapy Plan on Hold</a></li> <li>• <a href="#">Remove an Infusion Therapy Plan from Hold</a></li> </ul>                                                                                                                                                           |
| Topic | <a href="#">Renew vs Discontinue an Infusion Therapy Plan</a>                                                                                                                                                                                                                                                                             |
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| Topic | <a href="#">View Infusion Therapy Plans</a>                                                                                                                                                                                                                                                                                               |
|       | <ul style="list-style-type: none"> <li>• <a href="#">Plan Summary</a></li> <li>• <a href="#">Medication Lists</a></li> <li>• <a href="#">Medication Reconciliation</a></li> </ul>                                                                                                                                                         |
| Topic | <a href="#">Release and Document Infusion Therapy Plans</a>                                                                                                                                                                                                                                                                               |
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| Topic | <a href="#">Pharmacy</a>                                                                                                                                                                                                                                                                                                                  |
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| Topic | <a href="#">Scheduling</a>                                                                                                                                                                                                                                                                                                                |
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| Topic | <a href="#">Additional Resources</a>                                                                                                                                                                                                                                                                                                      |
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## Order an Infusion Therapy Plan

### Locate the Infusion Therapy Plan Navigator: Outpatient

1. If the **Infusion Therapy Plan** activity (i.e. tabs across the chart) is not in view by default, click the arrow to open the **More** menu and select **Infusion Therapy Plans**.

- **Note:** Click the **Star** icon to the right of Infusion Therapy Plans to save the activity as a tab.

The screenshot shows the 'Plan' tab selected in the top navigation bar. A red box highlights the 'More' menu icon (three dots) in the top right corner. The 'More' menu is open, showing a list of activities. 'Infusion Therapy Plans' is highlighted at the bottom of the list, with a star icon to its right. The main content area displays 'Medications & Orders' with a list of medications, including 'metoprolol succinate (TOPROL-XL) 100 mg 24 hr tablet'. The 'Medications from outside sources' section is also visible.

### Locate the Infusion Therapy Plan Navigator: Inpatient

There are multiple ways to access the Infusion Therapy Plan navigator when ordering infusion therapy for discharge.

#### Infusion Therapy Plan Activity:

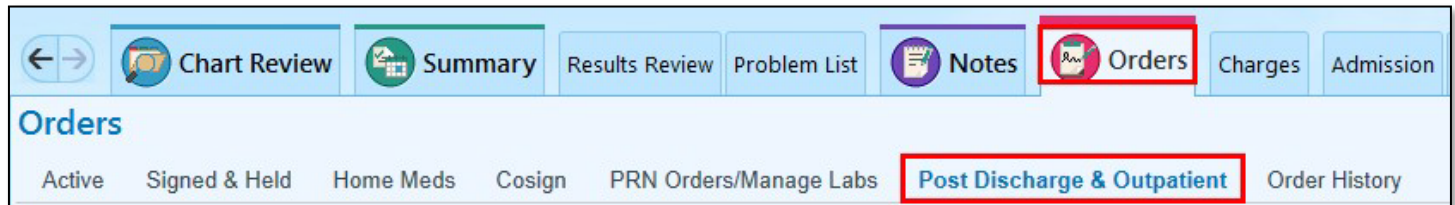
1. If the **Infusion Therapy Plan** activity (i.e. tabs across the chart) is not in view by default, click the arrow to open the **More** menu and select **Infusion Therapy Plans**.

- **Note:** Click the **Star** icon to the right of Infusion Therapy Plans to save the activity as a tab.

The screenshot shows the 'Summary' tab selected in the top navigation bar. A red box highlights the 'More' menu icon (three dots) in the top right corner. The 'More' menu is open, showing a list of activities. 'Infusion Therapy Plans' is highlighted at the bottom of the list, with a star icon to its right. The main content area displays various patient data, including 'Hospital Problems' (Stroke (HCC), Diabetes Mellitus NOS, Hypertension, Hypothyroidism), 'Vital Signs' (Temperature, Pulse Rate, Resp Rate, Blood Pressure, SpO2 (%)), 'Lab Results' (None), and 'Selected Labs' (Sodium, S, Potassium, S, Chloride, S).

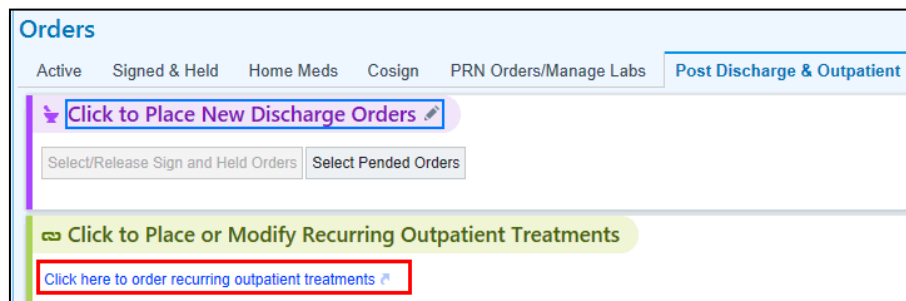
## Orders Activity:

1. Select the **Orders** activity tab then the **Post Discharge & Outpatient** tab.



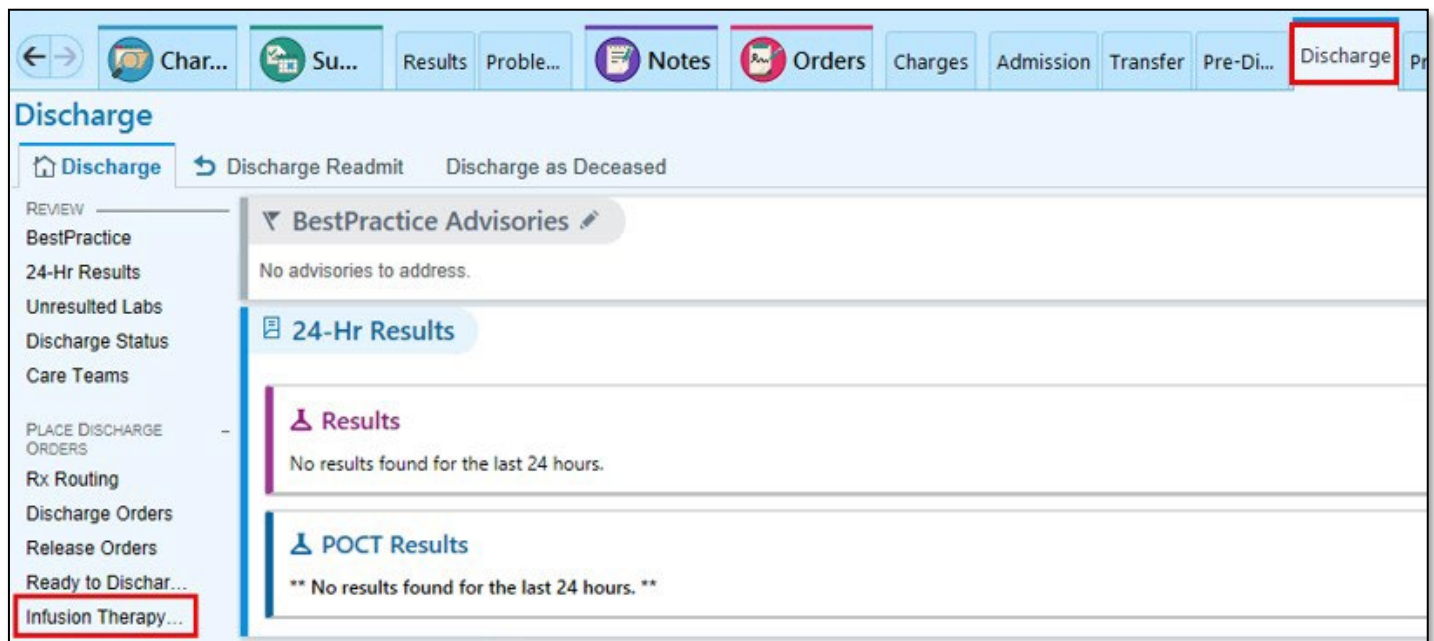
2. Within the **Click to Place or Modify Recurring Outpatient Treatments** section, click the hyperlink to open the **Infusion Therapy Plans** navigator.

- **Note:** This will not save the activity as a favorite.



## Discharge Activity:

1. Select the **Discharge** activity tab.
2. Select the **Infusion Therapy Plans** section.



### Locate the Infusion Therapy Plan Navigator: Emergency Department

1. Select the **Dispo** tab.
2. The **Therapy Plan** section will appear when a disposition of **Discharge** has been documented.
3. Click the **Therapy Plan** header to open the activity.

The screenshot shows the 'Dispo' (Disposition) tab selected in the top navigation bar. Below the navigation bar, there is a red banner stating 'You are not assigned to this patient as an ED Provider'. The main content area is divided into several sections: 'SmartSets' with an 'Add a SmartSet' button; 'Disposition' with buttons for 'Discharge', 'Hospital Observation', 'Admit', and 'ED Observation', and a 'Condition' dropdown set to 'Good'; 'Comments' with a text area and a '100%' zoom level; 'Telemedicine' with a '+ New' button; 'Impressions' with an 'Add from Problem List' button and 'Add a new impression' button; and 'Med Rec/Rx/DME/ED FU' with a '+ New Order' button. At the bottom, the 'Therapy Plan' section is highlighted with a red box.

### Locate the Infusion Therapy Plan Navigator: Chart Search

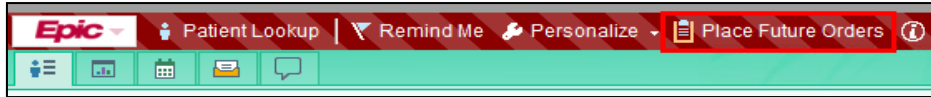
1. With the patient's chart open, type "infusion therapy" in chart search.
  2. Select **Infusion Therapy Plans**.
- **Note:** This does not save the activity as a tab across the top.

The screenshot shows the 'Chart Search' interface. The search bar at the top contains the text 'infusion ther'. Below the search bar, there is a list of results. The first result is 'infusion ther' with a magnifying glass icon. The second result is 'Jump to Infusion Therapy Plans' with a magnifying glass icon. The 'Jump to Infusion Therapy Plans' result is highlighted with a red box.

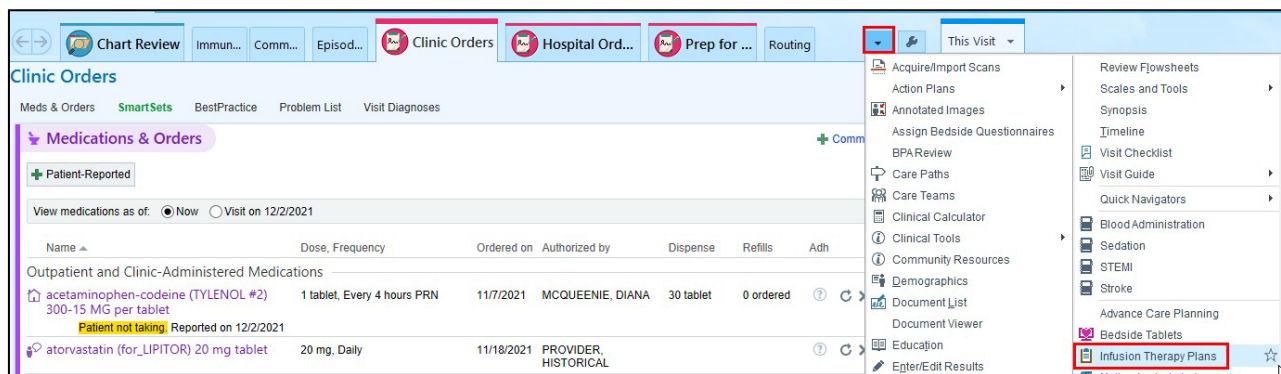
## Locate the Infusion Therapy Plan Navigator: Place Future Orders

If the patient is not present, use Place Future Orders to order an infusion therapy plan.

1. From the main Epic toolbar click **Place Future Orders**.



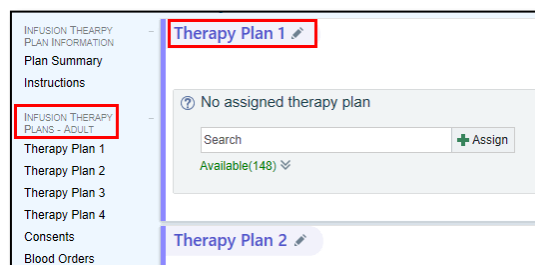
2. In the **Patient Lookup** window, search for the patient or use the **Recent Patients** tab if the patient's chart was recently accessed.
3. If the **Infusion Therapy Plan** activity (i.e. tabs across the chart) is not in view by default, click the arrow to open the **More** menu and select **Infusion Therapy Plans**.
  - **Note:** Click the **Star** icon to the right of Infusion Therapy Plans to save the activity as a tab within Place Future Orders.



## Infusion Therapy Plan Navigator Overview

The **Infusion Therapy Plans** navigator is separated into sections with headers. The headers provide a description for each section.

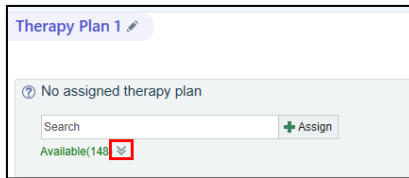
1. Click the header to quickly navigate to the section. For example, click **Infusion Therapy Plans – Adult** to navigate to the beginning of the section.



2. Click the wrench icon at the bottom of the navigator and select **Modify Navigator Layout** to move sections of the navigator.
3. Drag and drop sections in order of preference.
4. Click **Accept**.

## Select the Infusion Therapy Plan

1. From the appropriate section, select **Therapy Plan 1**.
  - **Note:** If the first therapy plan is in use, move to **Therapy 2** or the next available section.
2. Search for the infusion therapy plan or expand the **Available** section to see all therapy plans.



3. To save a base infusion therapy plan as a favorite, click the star icon to the right of the plan name.
  - **Note:** Therapy plans cannot be customized and saved as a favorite.



4. Orders contained in the infusion therapy plan may be previewed by clicking the paper and magnifying glass icon.



5. Select the appropriate infusion therapy plan.

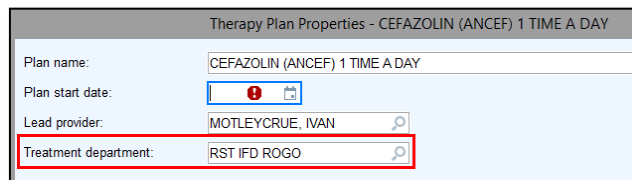
## Therapy Plan Properties Window

Upon selection, therapy plans have a properties window that must be completed prior to opening the therapy plan.

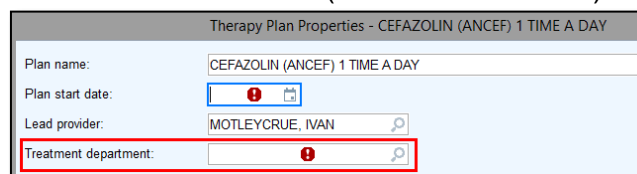
1. The **Plan Name** field defaults with the selected medication.
2. Complete the **Plan start date** which is the first date of treatment. Order due dates are calculated based on the start date. The start date can be modified.
3. The **Lead Provider** will default if a provider is ordering. Non-providers must complete the field with the ordering provider.

The treatment department is used to route the therapy plan to the appropriate team for site specific prior authorization review.

4. **Outpatient:** The **Treatment Department** field will default with the encounter department.



5. **Inpatient:** The **Treatment Department** field is required.
  - Most of the time, providers will use their log in department.
  - Providers logged into a virtual department (HIM, CCM, etc.) will enter the infusion department where the patient will receive treatment (ex: RST INF ROMB).



6. **Emergency Department:** The **Treatment Department** field defaults to the log in department.
  - Providers logged into an emergency department will enter the infusion department where the patient will receive treatment (ex: RST INF ROMB).

Therapy Plan Properties - CEFAZOLIN (ANCEF) 1 TIME A DAY

Plan name: CEFAZOLIN (ANCEF) 1 TIME A DAY

Plan start date: [Calendar icon]

Lead provider: CRAFTSMAN, ALEX-EMER [User icon]

Treatment department: MCHS EULH ED [User icon]

7. There might be times when the treatment department will change such as, the patient is being treated in a different region from where the therapy plan was ordered.
  - Example:** Rochester provider orders therapy plan and the patient will receive it in Eau Claire.

A problem must be associated with a therapy plan.

8. Select a problem from the patient's problem list.
9. If the appropriate problem isn't listed, search for the problem.

Problems associated with this treatment are:

None.

| Description                                                                                      | Most Recent Stage | Overview | Resolves To |
|--------------------------------------------------------------------------------------------------|-------------------|----------|-------------|
| <input type="checkbox"/> Infection Toe Skin                                                      |                   |          |             |
| <input type="checkbox"/> *Chronic Kidney Disease Stage 4 (Glomerular Filtration Rate 15-29 (HCC) |                   |          |             |
| <input type="checkbox"/> Hyperkalemia                                                            |                   |          |             |
| <input type="checkbox"/> Fistula Arteriovenous Acquired (HCC)                                    |                   |          |             |
| <input type="checkbox"/> *Chronic Obstructive Pulmonary Disease (HCC)                            |                   |          |             |
| <input type="checkbox"/> *Gout                                                                   |                   |          |             |
| <input type="checkbox"/> *Hyperlipidemia                                                         |                   |          |             |
| <input type="checkbox"/> *Hypertension Essential Primary                                         |                   |          |             |
| <input type="checkbox"/> *Diabetes Mellitus Type 2 (HCC)                                         |                   |          |             |

Add a new problem [Add]

10. Once the details are complete in the properties window, click **Assign Plan**.

## Infusion Therapy Plan Overview

Infusion Therapy Plans were designed with the recommended dosing options for each medication.

1. The information documented in the properties window displays at the top. Click the **Properties** hyperlink to quickly change information such as the start date or lead provider.

Therapy Plan 1

CEFAZOLIN (ANCEF) 1 TIME A DAY [Red Stop Sign] Plan start: 11/15/2021 [User icon] Garrett Motleycrue, M.D. - Properties

Add a new order [Order]

2. Recommended orders are pre-selected. De-select if an order is not needed.
3. A red stop sign icon indicates required information that needs to be completed within an order.

☒ [Red Stop Sign] ceFAZolin in NaCl 0.9% IVPB (ANCEF)

intravenous, at 200 mL/hr, Administer over 15 Minutes, Once, Starting when released, For 1 dose Every 24 hours

4. All orders in an infusion therapy plan have both an **Order Schedule** section and an **Order Details** section.

5. Click the order details hyperlink to edit details in either the **Order Schedule** or **Order Details** sections.
6. The top right side of each section contains gray text defining what each section is for.

Antibiotic Infusion Therapy; Cefazolin (ANCEF); 60 minutes

Order Schedule

Which treatment days need this order?

*You can change Group with protocol and Category fields in the order group "cefazolin (ANCEF)-Standard-Every 24 hours"*

Group with protocol:

Category:

Interval:   Every 1 day

Every   days

Minimum separation:  days

Next due:

Duration: ☒ Until discontinued

☐   treatments

☐ Until

Order Details

How should the order be given on those days?

Status:

Will use treatment day's planned date.

Expires:

### Order Schedule – Appointment Requests and Intervals

The Order Schedule for appointment requests communicates with scheduling and is used to determine the number of appointments needed.

1. The **Interval** field has a pre-defined list of selections.
  - **Note:** Every Visit, PRN and Selected treatments are intervals that **do not** send appointment requests to the scheduling queue.
2. The **Minimum separation** field is used to set the minimum amount of time that must go by before the orders can be acted upon.
  - Ex: A weekly interval for any day, one time a week is selected. The treatment needs to be at least 5 days apart. 5 should be entered as the minimum separation.
3. Certain intervals will have additional fields to further specify when the appointment should occur.
4. Select an appropriate Duration:
  - **Until discontinued:** Ongoing therapy for an extended period.
  - **Treatments:** Used to indicate a specific number of treatments to be given in an undetermined amount of time.
  - **Until:** Used to indicate the specific number of days the patient should receive the therapy. This selection is recommended for antibiotics.
  - **Important:** Entering the number of treatments or an end date **does not** automatically complete the orders. These fields display in the infusion therapy plan as columns and act as a prompt to discontinue the infusion therapy plan once treatment is complete. The Duration column displays the remaining number of treatments or the end date of the treatment.

|                                                                                                                                                                                                                                                                                                                                | Interval    | Duration         | Due              | Last Released                 |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------|------------------|------------------|-------------------------------|
| <input type="checkbox"/> <b>✓ ceFAZolin (ANCEF) 1 time a day</b> <span>⌵</span> <span>✕ Remove Protocol</span>                                                                                                                                                                                                                 |             |                  |                  |                               |
| <input type="checkbox"/> Nursing Orders <span>⌵</span>                                                                                                                                                                                                                                                                         |             |                  |                  |                               |
| <input type="checkbox"/> <b>✓ Vital Signs</b><br>As needed, Starting when released, Until Specified<br>Each visit and per IV Administration Guidelines (IVAG) or medication manufacture guidelines when IVAG not present.                                                                                                      | Every 1 day |                  | ⌚ Mon 11/15/2021 | <span>📄</span> <span>✕</span> |
| <input type="checkbox"/> <b>✓ Notify Provider Vital Signs</b><br>Until discontinued, Starting when released, Until Specified<br>Systolic blood pressure less than: 90<br>Heart rate greater than: 140<br>Heart rate less than: 50<br>Respiratory rate greater than: 24<br>Respiratory rate less than: 12<br>SpO2 less than: 90 | Every 1 day |                  | ⌚ Mon 11/15/2021 | <span>📄</span> <span>✕</span> |
| <input type="checkbox"/> <b>✓ Notify Provider (specify)</b><br>Until discontinued, Starting when released, Until Specified<br>Notify provider for change in patient condition, critical lab results or infusion reaction.                                                                                                      | Every 1 day |                  | ⌚ Mon 11/15/2021 | <span>📄</span> <span>✕</span> |
| <input type="checkbox"/> <b>✓ Vascular access permissions</b><br>Place peripheral IV if no vascular access available: Yes<br>May use existing dialysis catheter for blood draws: Yes<br>Until discontinued, Starting when released, Until Specified                                                                            | Every 1 day |                  | ⌚ Mon 11/15/2021 | <span>📄</span> <span>✕</span> |
| <input type="checkbox"/> <b>✓ Nurse may initiate Nurse Protocol</b><br>Nurse may initiate: Vascular Access Patency<br>Until discontinued, Starting when released, Until Specified                                                                                                                                              | Every 1 day |                  | ⌚ Mon 11/15/2021 | <span>📄</span> <span>✕</span> |
| <input type="checkbox"/> Medications <span>⌵</span> <span>↑ Move Up</span>                                                                                                                                                                                                                                                     |             |                  |                  |                               |
| <input type="checkbox"/> <b>Antibiotic Infusion Therapy; Cefazolin (ANCEF); 60 minutes</b><br>Expected: S, Expires: S+365                                                                                                                                                                                                      | Every 1 day | Until 11/29/2021 | ⌚ Mon 11/15/2021 | <span>📄</span> <span>✕</span> |
| <input type="checkbox"/> <b>✓ ceFAZolin injection 1 g (ANCEF)</b><br>1 g, intravenous, Once, Starting when released, For 1 dose<br>Indications: Skin and soft tissue infection<br>Every 24 hours<br>If needed, reconstitute vial per package insert instructions. See IVAG for administration guidelines.                      | Every 1 day | Until 11/29/2021 | ⌚ Mon 11/15/2021 | <span>📄</span> <span>✕</span> |

## Order Schedule – Medications and Intervals

The Order Schedule for medications determines how often a medication may be released for treatment. The interval selected for a medication varies for single dose a day versus multiple doses a day.

### Single Dose/Treatment Day Medications

Medications given once in a treatment day contain the appointment request order within that medication.

1. Upon selecting the medication, the appointment request and medication order display.

☒ **cefazolin (ANCEF)-Standard-Every 24 hours**

☒ Antibiotic Infusion Therapy; Cefazolin (ANCEF); 60 minutes  
 Expected: S, Expires: S+365

☒ **ceFAZolin in NaCl 0.9% IVPB (ANCEF)**  
 intravenous, at 200 mL/hr, Administer over 15 Minutes, Once, Starting when released, For 1 dose  
 Every 24 hours

2. The interval for a medication given once per treatment day should match the interval on the appointment request.
3. To change the interval, select the **Edit Interval** button at the top or bottom of the infusion therapy plan.

**Therapy Plan 1**
↑ ↓

CEFAZOLIN (ANCEF) 1 TIME A DAY 🔄 Plan start: 11/15/2021 👤 Garrett Motleycrue, M.D. – [Properties](#)

Add a new order + Order
Clear Unsigned ✓ Sign (0) ✕ Remove (0) Next **Edit Interval** Actions

Show: ☒ Order ☐ Details

4. In the **Edit Interval** window, select both the appointment request and medication orders. Edit the **Interval Type** and **Duration** on the right.
  - **Note:** Every Visit, PRN and Selected treatments are intervals that **do not** send appointment requests to the scheduling queue.

|                                                                                                | Interval    | Duration         | Due            |
|------------------------------------------------------------------------------------------------|-------------|------------------|----------------|
| <b>ceFAZolin (ANCEF) 1 time a day</b>                                                          |             |                  |                |
| <input type="checkbox"/> Nursing Orders                                                        |             |                  |                |
| <input type="checkbox"/> Vital Signs                                                           | Every 1 day |                  | Mon 11/15/2021 |
| <input type="checkbox"/> Notify Provider Vital Signs                                           | Every 1 day |                  | Mon 11/15/2021 |
| <input type="checkbox"/> Notify Provider (specify)                                             | Every 1 day |                  | Mon 11/15/2021 |
| <input type="checkbox"/> Vascular access permissions                                           | Every 1 day |                  | Mon 11/15/2021 |
| <input type="checkbox"/> Nurse may initiate Nurse Protocol                                     | Every 1 day |                  | Mon 11/15/2021 |
| <input checked="" type="checkbox"/> Medications                                                |             |                  |                |
| <input checked="" type="checkbox"/> Antibiotic Infusion Therapy; Cefazolin (ANCEF); 60 minutes | Every 1 day | Until 11/29/2021 | Mon 11/15/2021 |
| <input checked="" type="checkbox"/> ceFAZolin injection 1 g (ANCEF)                            | Every 1 day | Until 11/29/2021 | Mon 11/15/2021 |

Interval Type: **Daily**  
Every **1** days

Next Due: 11/15/2021  
Duration: ☐ Until discontinued  
☐ treatments  
☒ Until 11/29/2021

**Summary**  
Orders will be due every 1 days starting on 11/15/2021

5. Click **Accept**.

### Multiple Doses/Treatment Day Medications

Medications given more than once in a treatment day are separated from the appointment requests within the infusion therapy plan.

1. Appointment requests is a separate section outside of the medication. This section contains two or three appointment requests depending on the medication selected, i.e., 2 times a day vs 3 times a day.
  - **Note:** Every Visit, PRN and Selected treatments are intervals that **do not** send appointment requests to the scheduling queue.

☒ Appointment Requests

- ☒ Antibiotic Infusion Therapy; Cefazolin (ANCEF); 60 minutes  
Expected: S, Expires: S+365
- ☒ Antibiotic Infusion Therapy; Cefazolin (ANCEF); 60 minutes  
Expected: S, Expires: S+365

☒ Medications

- ☒ **cefazolin (ANCEF)-Standard-Every 12 hours**
  - ☒ **ceFAZolin in NaCl 0.9% IVPB (ANCEF)**  
intravenous, at 200 mL/hr, Administer over 15 Minutes, Once, Starting when released, For 1 dose Every 12 hours

2. The interval for a medication given 2 or 3 times per treatment day is set at every visit. Do not change the interval. This allows the nurse to release a dose of the medication for each scheduled appointment.

### Order Details – Appointment Requests

Most order details default and should not be changed. There are instances when additional instructions for scheduling may be needed.

1. **Status:** Defaults to **Future**. Do not change.
2. **Region:** Defaults to ordering provider's region upon signing.
  - **Note:** A region should be selected if the patient will be receiving treatment in a different region than where it is ordered.

3. **Medication:** Defaults based on selected medication.
4. **Appointment duration:** Defaults based on selected medication.
5. **Urgent ED Outpatient Scheduling Required:** Certain MCHS sites schedule outpatient treatments in the emergency department. Upon selecting **Yes**, select the site in the **ED** field.
6. **Sched Inst:** Additional, specific instructions to scheduling.

### Order Details – Medications

Most order details default and should not be changed. There are instances where the dose of a medication or an indication is required or needs to be changed.

1. **Dose:** Select the dose or change the dose as needed.
2. **Route:** Default based on selected medication.
3. **Frequency:** Defaults to once and should not be changed. This allows the nurse to release the medication one time per treatment.
  - **Note:** If the frequency is changed, the encounter cannot be closed.
4. **Indications:** If required, select a choice or free text the indication if not listed.
5. **Admin Instr:** Document any needed administration instructions for the nurse.
6. **Note to Pharmacy:** Document any needed information for the pharmacist.

### Add Additional Orders

Orders can be added to a therapy plan to be carried out while the patient is in an infusion area. Orders can be added while ordering a therapy plan or later if editing a therapy plan.

From the **Edit Plan** tab in the therapy plan:

1. At the top of the therapy plan, type the order in the **Add a new order field** and press **Enter** on the keyboard.
2. Select the order that you would like to add.
  - **During Visit Procedures or Medication (indicated by the “bed” icon):** Order will be performed in the infusion center. Not all infusion centers draw for labs. Check local site processes before ordering labs to be performed in an infusion center.
  - **After Visit Procedures (indicated by “house” icon):** Usually used for lab orders. Order will be scheduled, and patient will present at lab for draw. These orders are often placed outside of the therapy plan.
3. Complete the **Order Schedule**.
  - Select a **Category** (ex: Pre-Medications, Medications, Post-Medications, Labs, Emergency Medications, etc.) to ensure the order is grouped with other like orders in the plan.
  - Interval indicates how often the order will be performed.
4. Complete the **Order Details**.
5. Change the **Frequency** on medications to **Once**.
6. Sign the plan once the orders have been added and details completed.

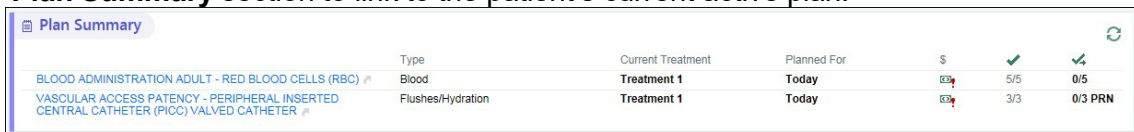
### Sign the Infusion Therapy Plan

1. Click **Sign Plan** button located at the top or bottom of the infusion therapy plan.
2. Verify the diagnosis associated to the plan is correct then click **Accept**.
3. Any orders not selected are automatically removed.
4. Signed orders are indicated with a green checkmark icon .
5. Appointment requests sent to scheduling are indicated by a calendar and arrow icon .

## Nursing Communication Orders – Oncology Providers and Nursing Only

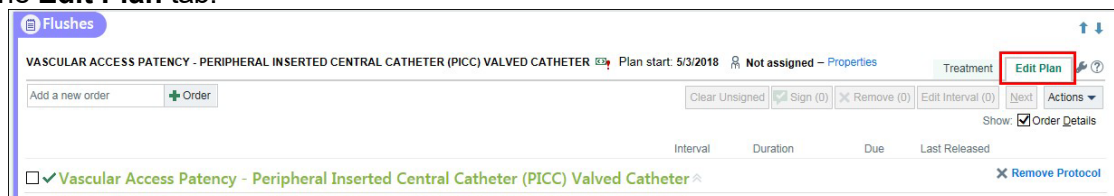
Nursing can add communication orders to an infusion therapy plan. This can be done for communication about specific patient needs or if a provider sign-off for a specific circumstance is needed. For example, a patient has a PICC line that does not give a blood return, but a provider still okays to use. A nurse can queue up the order into a therapy plan and send to the provider's In Basket for signature.

1. Use the **Plan Summary** section to link to the patient's current active plan.

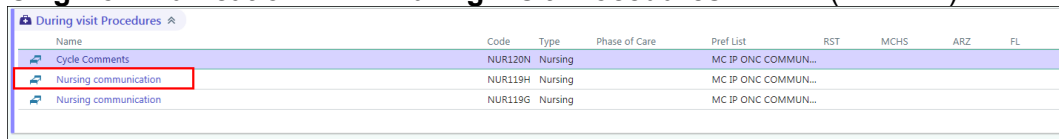


| Type                                                                                  | Current Treatment | Planned For | Status |
|---------------------------------------------------------------------------------------|-------------------|-------------|--------|
| BLOOD ADMINISTRATION ADULT - RED BLOOD CELLS (RBC)                                    | Treatment 1       | Today       | 5/5    |
| VASCULAR ACCESS PATENCY - PERIPHERAL INSERTED CENTRAL CATHETER (PICC) VALVED CATHETER | Treatment 1       | Today       | 3/3    |

2. Select the **Edit Plan** tab.

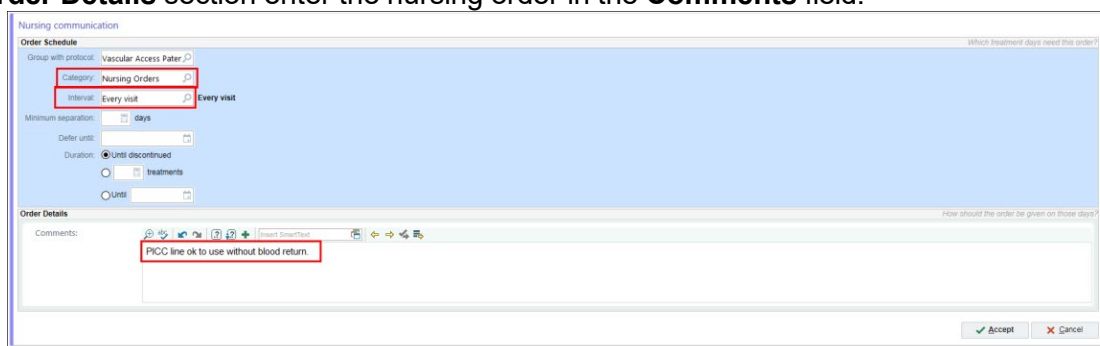


3. In the search field type "nursing comm".
4. Select **Nursing Communication** within **During Visit Procedures** section (bed icon).



| Name                  | Code    | Type    | Phase of Care | Pref List           | RST | MCHS | ARZ | FL |
|-----------------------|---------|---------|---------------|---------------------|-----|------|-----|----|
| Cycle Comments        | NUR120N | Nursing |               | MC IP ONC COMMUN... |     |      |     |    |
| Nursing communication | NUR119H | Nursing |               | MC IP ONC COMMUN... |     |      |     |    |
| Nursing communication | NUR119G | Nursing |               | MC IP ONC COMMUN... |     |      |     |    |

5. In the **Order Schedule**:
  - **Category:** Nursing Orders
  - **Interval:** Every Visit
6. In the **Order Details** section enter the nursing order in the **Comments** field.



7. Click **Accept**.
8. If appropriate, a nurse can sign the order. If not, route to provider for cosign.

## Send Infusion Therapy Plan to Provider

Nurses may edit infusion therapy plans and send to a provider to sign.

1. In the infusion therapy plan, click the **Actions** drop-down and select **Send Plan**.



- In the **Recipients** section, select the **Lead Provider** button.
  - Note:** If routing to someone other than the lead provider, search in the **Other Recipients** field.
- Enter a brief message and click **Send**.

- Once the provider has signed the order a green check mark will appear to the left of the order.

### *Sign Infusion Therapy Plan Orders from Nurse*

Infusion therapy plans route to the provider's In Basket for cosign.

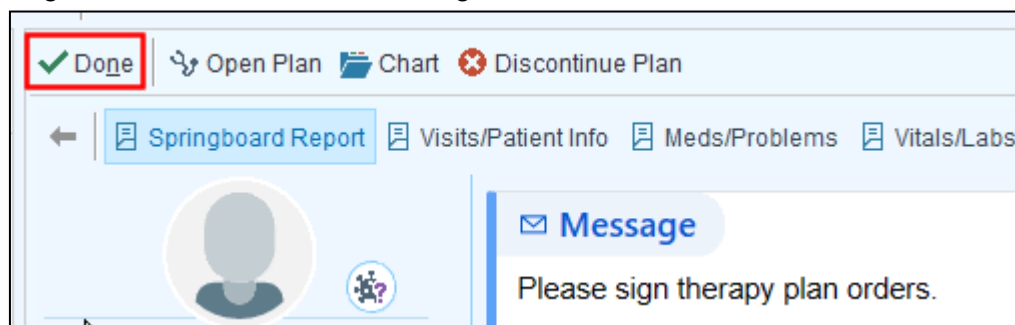
- Select the **Recurring Plans** folder then select the message.

- Click the **Open Plan** button on the message toolbar.

- The message at the top of the plan indicates the orders are unsigned. Review the order(s) the nurse sent then sign.

- Upon signing, a green checkmark icon  displays to the left of the order name.

- After signing, return to the In Basket message and click **Done**.

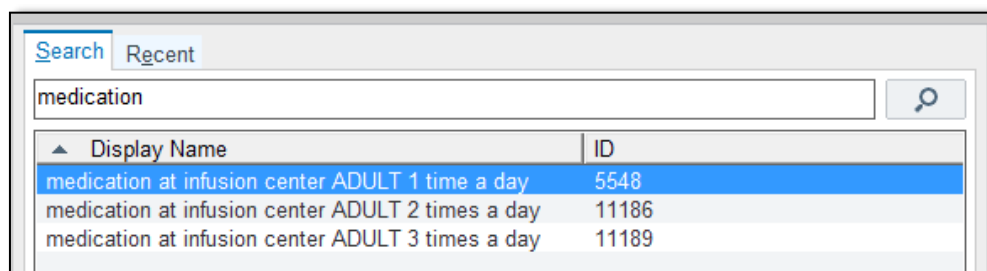


## Order an Infusion Therapy Plan for Unlisted Medications

### Unlisted Medication Infusion Therapy Plan

If the medication to be given in an infusion area is not available as a system-built therapy plan, use a miscellaneous therapy plan and add the needed medication.

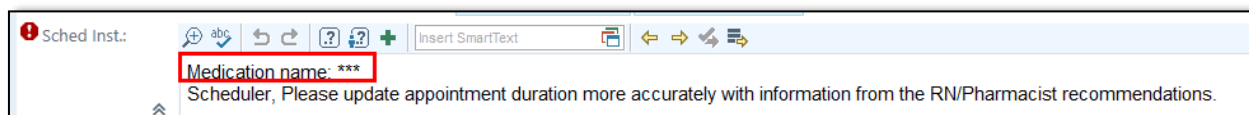
- In an open infusion therapy plan section, type “medication” in the search field and press **Enter**.
- Select the choice based on how often the medication will be given (i.e., 1 time a day, 2 times a day) and click **Accept**.



- Complete the information in the **Therapy Plan Properties** window.
- Click **Assign Plan**.

### Appointment Request Order Details

- Click the hyperlink to edit the details of the scheduling order.
- Select an **Interval** for the scheduling order.
  - Note: DO NOT** select Every visit, PRN, or Selected treatments. These intervals do not route to scheduling.
- If the medication is short term, specify a **Duration**.
- In the **Order Details** section, the **Appointment duration** defaults to 15 minutes. Edit based on the medication.
- In scheduling instructions, complete the wild card for the medication name.

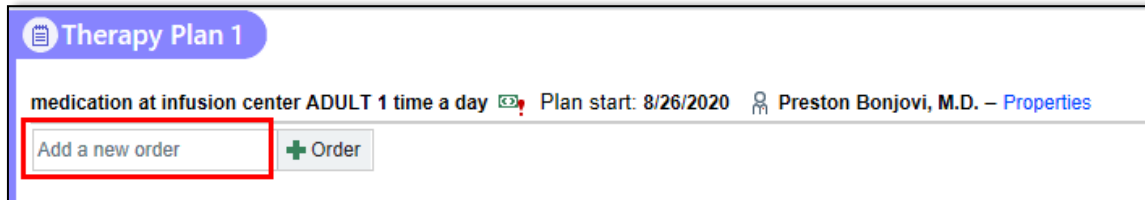


- Click **Accept** on the scheduling order.

## Add the Medication

Search for and add the medication to the therapy plan.

1. Type the name of the medication in the **Add a new order** field and press **Enter**.



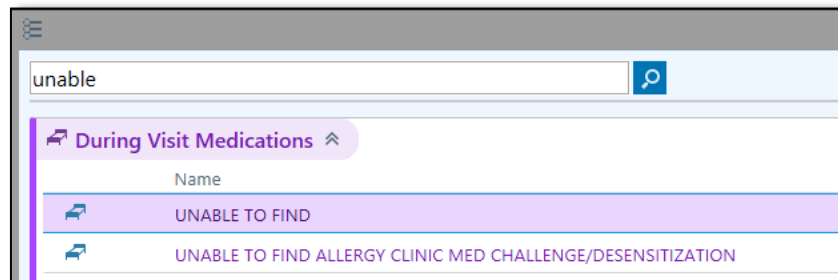
The screenshot shows a web interface for 'Therapy Plan 1'. At the top, it displays 'medication at infusion center ADULT 1 time a day' with a small icon, 'Plan start: 8/26/2020', and 'Preston Bonjovi, M.D. - Properties'. Below this, there is a text input field labeled 'Add a new order' which is highlighted with a red rectangular box. To the right of this field is a button with a green plus sign and the text '+ Order'.

2. Select the appropriate dose and click **Accept**.
3. Select **Medications** as the **Category**.
4. Select an **Interval**.
  - For 1 time a day administration, the interval should match the scheduling order interval.
  - For 2 or 3 times a day administration, select **Every visit**.
5. The Frequency defaults to **Once**. Do not change the frequency.
6. Click **Accept** on the medication order.
7. Click **Sign Plan**.

## Add an Unable to Find Medication

Use Unable to Find brand new medications on the market and are unavailable when searching.

1. Type "unable" in the **Add a new order** field and press **Enter**.
2. Select **unable to find** and click **Accept**.



The screenshot shows a search interface. At the top, there is a search bar with the text 'unable' and a magnifying glass icon. Below the search bar, there is a section titled 'During Visit Medications' with a dropdown arrow. Under this section, there is a table with two rows. The first row has a blue icon and the text 'UNABLE TO FIND'. The second row has a blue icon and the text 'UNABLE TO FIND ALLERGY CLINIC MED CHALLENGE/DESENSITIZATION'.

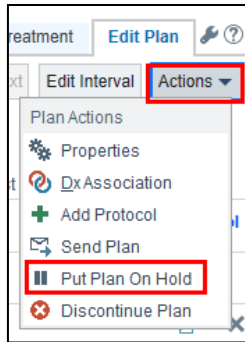
3. Complete the **Category** and **Interval**.
4. Complete the **Order Details** for the medication. Select a frequency of **Once**.
5. Click **Accept** once the details are completed and sign.

## Order an Infusion Therapy Plan for External Infusion Center

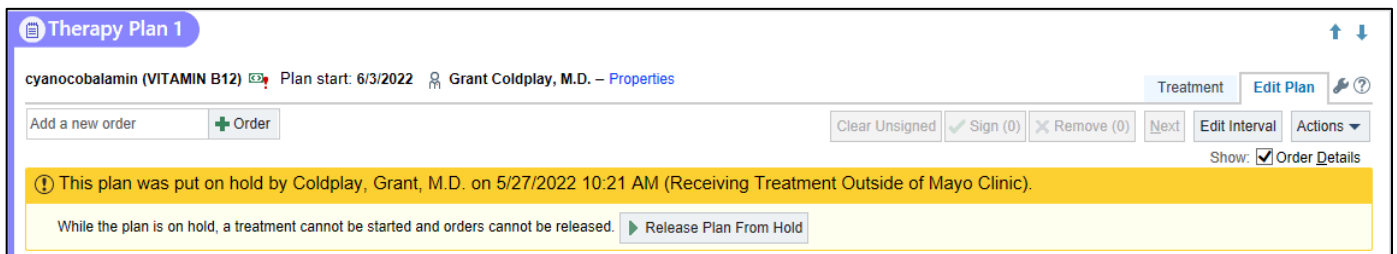
Order and print a therapy plan when a patient will receive treatment outside of a Mayo Clinic location.

### Order and Print the Infusion Therapy Plan

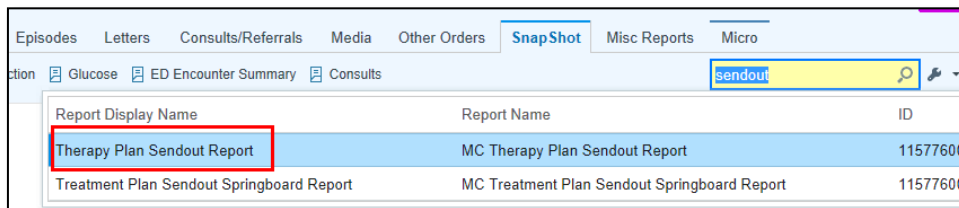
1. Search for the therapy plan or click **Available** under the search field to select from the list.
2. Complete the details in the **Therapy Plan Properties** window.
3. Click **Assign Plan**.
4. Update dose and sign the orders.
5. Click the **Actions** drop-down and select **Put Plan On Hold**.



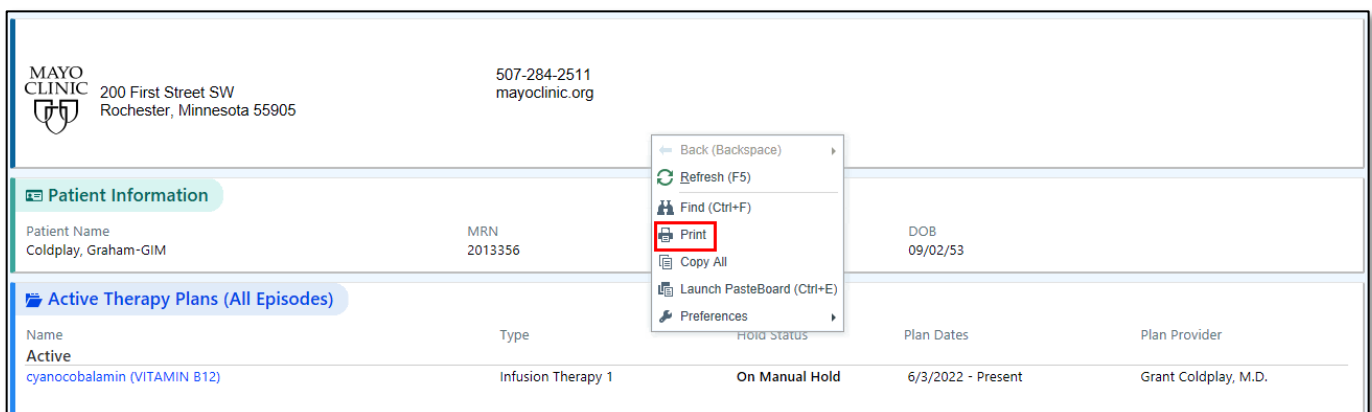
6. Select a reason of **Receiving Treatment Outside Mayo Clinic** and click **Accept**.
  - **Note:** Using the hold reason of Receiving Treatment Outside Mayo Clinic will remove scheduling requests from scheduling work queues. This is important so the patient does not get scheduled at Mayo Clinic.
7. A yellow banner will display indicating the plan is on hold.
  - **Note:** The plan cannot be started in the infusion center while on hold.



8. Once the therapy plan has been put on hold, select the **Chart Review** activity tab, then the **Snapshot** tab.
9. Type "**sendout**" in the Snapshot search field and press **Enter**.
10. Select the **Therapy Plan Sendout Report**.
  - **Note:** Click the wrench icon to customize this report as a toolbar button.

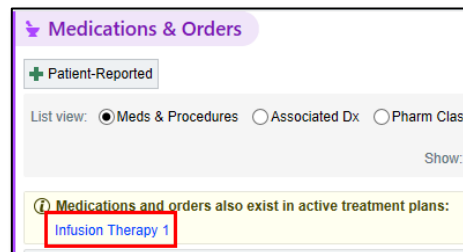


11. Right click in the report and select **Print**.
  - **Note:** This will print all therapy plans for the patient.



## View and Print the Infusion Therapy Plan in Medication Management

1. From the **Plan** activity, go to the **Medication Management** section.
2. Medications from therapy plans do not display in the medication list. Click the hyperlink to view the therapy plan.



3. Click on the medication hyperlink.

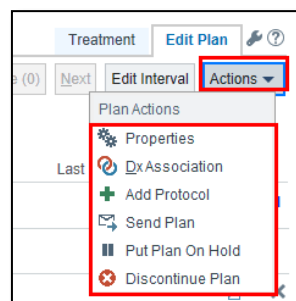
| Recurring Treatments                         |                    |                |                    |                      |
|----------------------------------------------|--------------------|----------------|--------------------|----------------------|
| Name                                         | Type               | Hold Status    | Plan Dates         | Plan Provider        |
| Active                                       |                    |                |                    |                      |
| <a href="#">cyanocobalamin (VITAMIN B12)</a> | Infusion Therapy 1 | On Manual Hold | 6/3/2022 - Present | Grant Coldplay, M.D. |

4. Once open, right click in the plan and select **Print**. This will print the single plan.
5. If an external site is using as an order, sign the paper copy.

## Infusion Therapy Plan Actions

### Actions Drop-Down

1. Click the **Actions** drop-down.

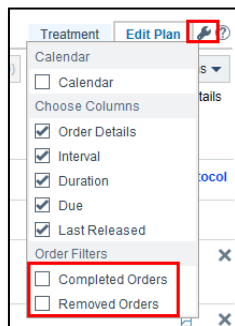


- **Properties:** Opens the Therapy Plan Properties window to edit if needed.
  - **Example:** Edit the start date if the first order has not been released.
- **Dx Association:** Edit the associated diagnosis or search for a new problem.
- **Add Protocol:** Add an additional therapy plan to an existing therapy plan. This is usually used when two of the therapy plan medications are going to be given at the same appointment.
- **Send Plan:** Send a plan to a provider. An example is prepping/pending orders and sending to the provider.
- **Put Plan on Hold:** Pauses the plan until the hold is removed.
- **Discontinue Plan:** Discontinues all therapy plan orders and removes the plan from the patient.
  - Once orders are completed, the therapy plan is still active for the patient and will be until discontinued.
  - Providers will be prompted to resign orders annually and could discontinue the plan at that time.

## Completed Orders vs Removed Orders

Click the wrench icon to customize the columns in an infusion therapy plan. Two order filter options help to find orders that may not be visible.

- **Completed Orders:** If a duration is placed on an order and the duration is reached, the order is not active. Select the check box to view the completed order and re-order if needed.
- **Removed Orders:** If an order is not selected it is automatically removed from the infusion therapy plan upon signing. Select the check box to view the removed order and reactivate if needed.
  - **Note:** An order may be manually removed from the infusion therapy plan by clicking the X to the right of the order.

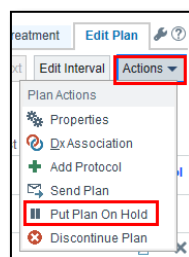


## Hold an Infusion Therapy Plan

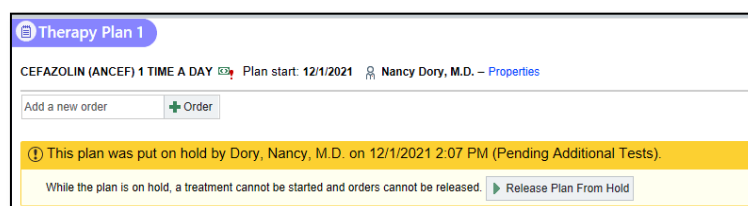
### Place an Infusion Therapy Plan on Hold

If treatment needs to be paused, the infusion therapy plan can be placed on hold.

1. In the **Actions** drop-down, select **Put Plan On Hold**.



2. Select a reason and click **Accept**.
3. A notification appears at the top of the infusion therapy plan.

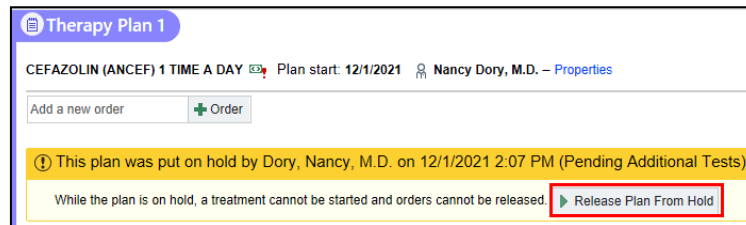


4. All hold reasons suppress scheduling orders and will not generate an active request.

## Remove an Infusion Therapy Plan from Hold

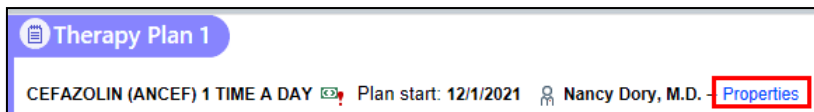
When an infusion therapy plan is released from hold, there are two potential scenarios for editing depending if treatment was started for the patient.

1. From the held infusion therapy plan, click **Release Plan From Hold**.



The screenshot shows a 'Therapy Plan 1' window. At the top, it says 'CEFAZOLIN (ANCEF) 1 TIME A DAY' with a status icon and 'Plan start: 12/1/2021' followed by a user icon and 'Nancy Dory, M.D. - Properties'. Below this are buttons for 'Add a new order' and '+ Order'. A yellow warning banner states: 'This plan was put on hold by Dory, Nancy, M.D. on 12/1/2021 2:07 PM (Pending Additional Tests)'. Below the banner, a message says 'While the plan is on hold, a treatment cannot be started and orders cannot be released.' To the right of this message is a button labeled 'Release Plan From Hold' which is highlighted with a red rectangle.

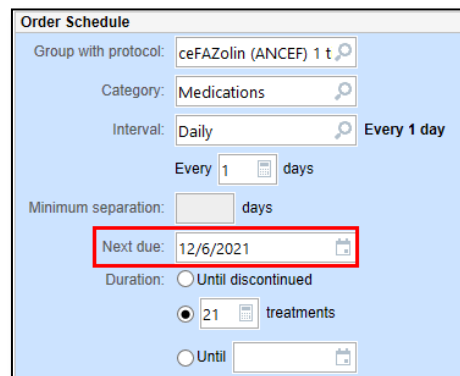
2. Select a reason for releasing the hold and click **Accept**.
3. If the treatment was not started, click the **Properties** hyperlink and edit the start date.



This screenshot is similar to the previous one, showing the 'Therapy Plan 1' window. The 'Properties' hyperlink next to the provider name 'Nancy Dory, M.D.' is highlighted with a red rectangle.

4. If treatment was started for the patient and the plan was placed on hold, after releasing the plan the start date cannot be edited within the **Properties** window. Instead, enter the next due date in the Order Schedule for both the appointment request and medication orders.

- **Note:** Use **Edit Interval** to update both orders at once.



The screenshot shows the 'Order Schedule' window. It contains fields for 'Group with protocol: ceFAZolin (ANCEF) 1 t', 'Category: Medications', 'Interval: Daily' (with a sub-field 'Every 1 days'), and 'Minimum separation: days'. The 'Next due:' field, which shows '12/6/2021', is highlighted with a red rectangle. Below this are 'Duration' options: 'Until discontinued' (unselected), '21 treatments' (selected with a radio button), and 'Until' (unselected).

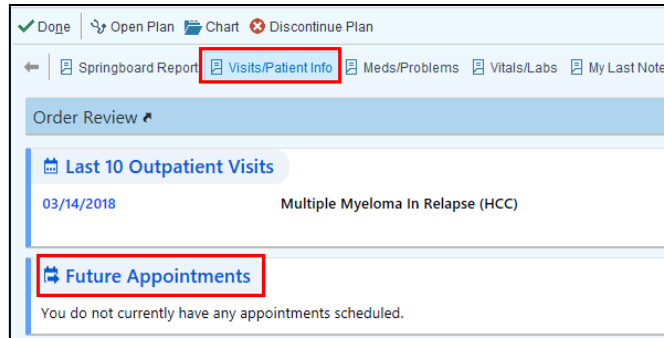
5. Scheduling orders are released and will generate active requests.

## Renew vs Discontinue an Infusion Therapy Plan

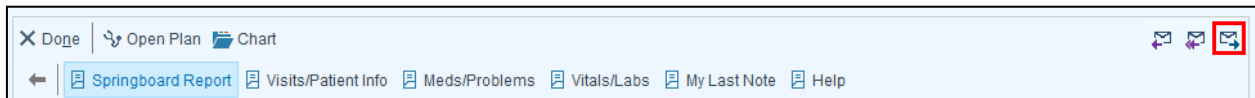
Therapy Plan Renewal messages will appear in the Recurring Plans folder of In Basket to indicate an expiring Therapy Plan needs to be addressed; each order in the Therapy Plan must be addressed. Messages are sent automatically starting 7 days prior to when therapy plan orders need to be renewed, which is 365 days after they were originally signed. Messages are sent once.

## Discontinue an Infusion Therapy Plan from In Basket

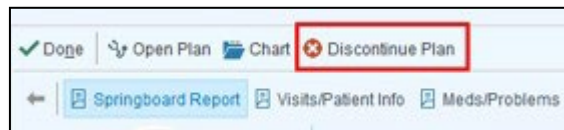
1. Select the **Recurring Plans** folder in In Basket and select the message.
2. Prior to discontinuing the plan, click the **Visits/Patient Info** button and find the **Future Appointments** section.



3. If the patient has future infusion appointments that need to be cancelled (ie. INF visit types), click the forward button on the message and communicate with scheduling staff to cancel the future ITC/AIC appointments or active ITC/AIC scheduling requests.



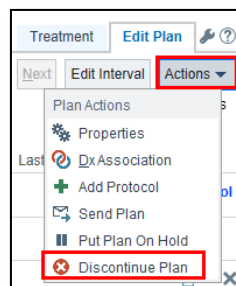
4. In the **To** field, enter the scheduling pool or person you are routing to. Enter a message in the **Notes** field then click **Accept** to send.
5. Click **Discontinue Plan** on the message toolbar.



6. Enter a discontinue **Reason** and click **Accept**.

### *Discontinue an Infusion Therapy Plan from the Patient Chart*

1. In the therapy plan to be discontinued, click the **Actions** drop-down and select **Discontinue Plan**.



2. Enter a discontinue reason and click **Accept**.
3. If there are open orders in the therapy plan, the **Orders to Review for Discontinuation** window appears displaying the open orders.
4. Select each order, select an **Order Mode** then click **Discontinue Selected Orders**.

5. Communicate with scheduling staff as there may be future ITC/AIC appointments scheduled or active ITC/AIC scheduling requests.

## Renew an Infusion Therapy Plan

1. Select the **Recurring Plans** folder in In Basket and select the message.
2. Click **Open Plan** on the message toolbar.
3. Review all orders in the therapy plan, including nursing orders and pre-medications.
4. Select the orders for renewal.
  - **Note:** If you do not select all orders that were previously signed, you will continue to receive an In Basket message. To prevent this, remove any individual order from the plan by clicking "X" prior to resigning.
  - Previously signed orders are indicated by provider sign or for nursing sign to the left of the order name.
5. For ongoing Therapy Plan orders, you can use **Edit Interval** to set an expiration date for all the Therapy Plan orders at once.

6. After selecting Edit Interval, use the **Until** field within **Duration** to enter an end date. This will set the time for the renewal message to you.

7. Sign the therapy plan and associate the diagnosis. Click **Accept**.
8. Return to the In Basket message and click **Done**.

## View Infusion Therapy Plans

### Plan Summary

The Plan Summary displays all types of plans on the patient, including treatment plans.

1. Click the hyperlinked name of the plan to quickly navigate to the section the plan was ordered from.
2. View the current treatment day or number and the planned day.
3. Hover over icons to see prior authorization status, signed orders and released orders.

| Plan Summary                                                                                          |                                   |                   |               |                                               |      |         |
|-------------------------------------------------------------------------------------------------------|-----------------------------------|-------------------|---------------|-----------------------------------------------|------|---------|
|                                                                                                       | Type                              | Current Treatment | Planned For   | \$                                            | ✓    | ✗       |
| VASCULAR ACCESS PATENCY - IMPLANTED VASCULAR ACCESS DEVICE (IVAD) VENOUS NON-VALVED <a href="#">a</a> | Flushes/Hydration                 | Treatment 40      | Not scheduled | 0/3                                           | 3/3  | 0/3 PRN |
| Hydration <a href="#">a</a>                                                                           | Infusion Therapy 1                | Treatment 42      | Not scheduled | 0/2                                           | 2/2  | 0/2 PRN |
| FOLFOX6 ( Fluorouracil / Leucovorin / Oxaliplatin ) ( GI ) <a href="#">a</a>                          | Hematology / Oncology Treatment 1 | Day 1, Cycle 7    | Today         | 0/2                                           | 3/18 | 2/18    |
| <a href="#">Close</a>                                                                                 |                                   |                   |               | <a href="#">Previous</a> <a href="#">Next</a> |      |         |

### Medication Lists

Active medications from a patient's infusion therapy plan will not display in the patient's medication list. The top of the patient's medication list displays all active treatments and hyperlinks to view plan information. The links display in any encounter on the patient's medication list (i.e., Chart Review, Prior to Admission Medications, Medications & Orders).

#### Medications & Orders

[+ Comments](#)

[+ Patient-Reported](#)

**Medications and orders also exist in active treatment plans:**  
[Infusion Therapy 1](#)

[Review open orders](#)

| Name                                                | Authorized by    | Dispense  | Refills    | Adh                                                                     |
|-----------------------------------------------------|------------------|-----------|------------|-------------------------------------------------------------------------|
| atorvastatin (LIPITOR) 20 MG tablet                 | MCQUEENIE, DIANA | 30 tablet | 11 ordered | <a href="#">?</a> <a href="#">X</a> <a href="#">C</a> <a href="#">V</a> |
| Dose, Frequency: 20 mg, Daily Ordered on: 1/12/2021 |                  |           |            |                                                                         |

### Medication Reconciliation

All medication reconciliation tabs contain the active treatments and hyperlinks within the Manage Orders sidebar.

Sidebar Sum... Handoff Dischar...

Discharge Order Rec. Order Sets

Options

[Edit M...](#) [Phase o...](#) [Patient Est...](#)

[Place new discharge or...](#) [New](#) [Next](#)

**Reconcile Meds for Discharge is incomplete.**

**This patient has active treatment/therapy plans.**

## Locate Infusion Therapy Plan Orders

Inpatient Nurse (with outpatient in a bed): Open the chart from Unit Manager.

1. Open the **More** activity.
2. Select the **Infusion Therapy Plans** navigator.
3. Under the **Plan Summary** section, you will see the Therapy Plan the provider has placed for the patient.

INFLUENZA THERAPY PLAN INFORMATION

Plan Summary

Instructions

INFLUENZA THERAPY PLANS - ADULT

Therapy Plan 1

Plan Summary

Hydration

Close

Type

Infusion Therapy 1

Current Treatment

Not Signed

Planned For

Today

\$

0/27

0/27

Previous

Next

To streamline Vascular Access Protocol orders for patients who are seen in any therapy plan based infusion area (ITC, Dialysis, Apheresis), the protocol can now be documented once, and the medications can be ordered as therapy plans.

1. A new Vascular Access Protocol section has been added to the therapy plans navigator to allow the nurse to chart the Inclusion/Exclusion criteria for the protocol. The charting can be referenced across multiple encounters and must be completed annually.

**Vascular Access Protocol - Vascular Access Patency**

Time taken: 0050 4/30/2018

Responsible: [dropdown] Create Note

Show ☒ Row info ☐ Last Filed ☐ Details ☒ All Choices

**Vascular Access in Therapy Plans Protocol**

☒ Patient has a vascular access device
 ☐ Yes - Continue ☐ No - Excluded

☒ Patient has a history of heparin allergy, heparin-induced thrombocytopenia, or prescriber orders withholding the use of heparin
 ☐ Yes ☐ No

| Line Type                                                                                                                                                                                                                                                                                                       | Peripheral Intravenous Catheter or Rapid Infusion Catheter                                                                                                                                                                             | Midline Catheter                                                                                                                                                                                                                                    | Peripherally Inserted Central Catheter (PICC) Valved |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------|
| <input type="checkbox"/> Peripherally Inserted Central Catheter (PICC) Non-Valved<br><input type="checkbox"/> Central Venous Catheter (CVC) Tunneled Valved<br><input type="checkbox"/> Implanted Vascular Access Device (IVAD) Arterial<br><input type="checkbox"/> Dialysis Arterio-Venous Fistula and Grafts | <input type="checkbox"/> Central Venous Catheter (CVC) Non-Tunneled Non-Valved<br><input type="checkbox"/> Implanted Vascular Access Device (IVAD) Venous Non-Valved<br><input type="checkbox"/> Hemodialysis Catheter with a Tego Cap | <input type="checkbox"/> Central Venous Catheter (CVC) Tunneled Non-Valved<br><input type="checkbox"/> Implanted Vascular Access Device (IVAD) Arterial<br><input type="checkbox"/> Hemodialysis Catheter and High Flow Catheter without a Tego ... |                                                      |

2. Upon filling out the protocol, the nurse will select the corresponding therapy plan from the Flushes section (located below the Vascular Access Protocol documentation). Both Adult and Pediatric specific therapy plans are included in the Flushes section.

[illegible]

- Upon selection, the nurse will select a Plan start date, Treatment department, and an associated problem. If one is not available, a problem can be added.

**Therapy Plan Properties - VASCULAR ACCESS PATENCY - IMPLANTED VASCULAR ACCESS DEVICE (IVAD) VENOUS NON-VALVED**

Plan name: VASCULAR ACCESS PATENCY - IMPLANTED VASCULAR ACCESS DEVICE (IVAD) VENOUS NON-VALVED

Plan start date: 4/30/2018

Lead provider: [dropdown]

Treatment department: RST INF ROMB [dropdown]

Problems associated with this treatment are:

Appendicitis

| Description                                                      | Most Recent Stage | Overview | Resolves To  |
|------------------------------------------------------------------|-------------------|----------|--------------|
| <input type="checkbox"/> Pain Abdominal Chronic                  |                   |          |              |
| <input checked="" type="checkbox"/> Appendicitis                 |                   |          | Appendicitis |
| <input type="checkbox"/> Abnormal Chest Xray Mediastinum Widened |                   |          |              |

Add a new problem [Add]

Add to favorites [Assign Plan] [Cancel]

- The nurse will then Select the orders and sign the plan. Note the expiration of the medications (Until 4/20/2019). The flush therapy plans expire in 1 year, which will require the nurse to document the Inclusion/Exclusion criteria and re-order the appropriate therapy plan.

**Vascular Access Patency - Implanted Vascular Access Device (IVAD) Venous Non-Valved** Unsigned: 8 orders are not signed [X Remove Protocol]

| Line Maintenance                    | Description                                                                                                                                                                                                                                                                                                                                                                                                     | PRN | UHR 4/30/2019 | PRN | [Sign] [X] |
|-------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----|---------------|-----|------------|
| <input checked="" type="checkbox"/> | sodium chloride injection 10 mL, 10 mL, intra-catheter. As needed, line care, Starting when released. When IVAD Accessed and in use. Flush prior to and following infusion, between multiple consecutive infusions, and prior to blood sampling.                                                                                                                                                                | PRN | UHR 4/30/2019 | PRN | [Sign] [X] |
| <input checked="" type="checkbox"/> | sodium chloride injection 20 mL, 20 mL, intra-catheter. As needed, line care, Starting when released. When IVAD Accessed and in use. Flush prior to and following infusion, between multiple consecutive infusions, and prior to blood sampling.                                                                                                                                                                | PRN | UHR 4/30/2019 | PRN | [Sign] [X] |
| <input checked="" type="checkbox"/> | sodium chloride injection 10 mL, 10 mL, intra-catheter. As needed, line care, Starting when released. When no infusion to maintain patency. For IVAD accessed and in use, flush every 12 hours. For IVAD accessed, not in use, and/or prior to hospital discharge, flush every 7 days followed by heparin flush. For IVAD NOT accessed or used, flush every 4 weeks followed by heparin flush.                  | PRN | UHR 4/30/2019 | PRN | [Sign] [X] |
| <input checked="" type="checkbox"/> | heparin flush 500 Units, 500 Units, intra-catheter. As needed, line care, Starting when released. When no infusion to maintain patency. For IVAD accessed and in use, flush every 12 hours. For IVAD accessed, not in use, and/or prior to hospital discharge, flush every 7 days followed by 0.9% preservative-free NaCl, flush. For IVAD NOT accessed or used, flush every 4 weeks followed by heparin flush. | PRN | UHR 4/30/2019 | PRN | [Sign] [X] |
| <input checked="" type="checkbox"/> | NaCl 0.9% infusion, 10-250 mL/hr, intravenous. As needed, Between Consecutive Piggyback Administrations, Starting when released. Infuse at the same rate as the piggyback until tubing clears or up to a volume of 25 mL, then for IV medication administration when no maintenance IV available or when IV medications are not compatible with maintenance fluid.                                              | PRN | UHR 4/30/2019 | PRN | [Sign] [X] |
| <input checked="" type="checkbox"/> | NaCl 0.9% infusion, 10-250 mL/hr, intravenous. As needed, Post Medications (Intravenous/low Fluid Volume), Starting when released. Infuse at the same rate as the medication until tubing cleared of medication, then discard.                                                                                                                                                                                  | PRN | UHR 4/30/2019 | PRN | [Sign] [X] |
| <input checked="" type="checkbox"/> | D5W infusion, 10-250 mL/hr, intravenous. As needed, Medications Incompatible with 0.9% NaCl, Starting when released. Infuse at the same rate as the medication until tubing cleared of medication, then discard.                                                                                                                                                                                                | PRN | UHR 4/30/2019 | PRN | [Sign] [X] |
| <input checked="" type="checkbox"/> | NaCl 0.9% infusion, 10-250 mL/hr, intravenous. As needed, Medications Incompatible with 0.9% NaCl, Starting when released. Infuse at the same rate as the medication until tubing cleared of medication, then discard.                                                                                                                                                                                          | PRN | UHR 4/30/2019 | PRN | [Sign] [X] |

Never reviewed [Clear Unsigned] [Sign All] [X Remove (S)] [Edit Interval (S)]

- A diagnosis association box will pop with the associated problem already selected. Accept this.
- Sign the orders Per protocol, cosign required. This will send a cosigning action to the ordering provider. The orders can now be released on the infusion therapy visits. If the provider has signed the Vascular Access Protocol as part of pre-treatment orders, the nurse can use the ordering mode “no-cosign required.”
- When the patient arrives for subsequent visits, the historical protocol documentation can be referenced in the vascular access section. If there are any changes to the Inclusion/Exclusion documentation (allergy, different line type), the nurse will need to make the appropriate updates. If this occurs, the current therapy plan will need to be discontinued and the appropriate therapy plan ordered.

**Vascular Access Protocol**

New Reading

04/30/18 0916

**Vascular Access in Therapy Plans Protocol**

Patient has a vascular access device Yes - Continue

Patient has a history of heparin allergy, Heparin-induced thrombocytopenia, or prescriber orders withholding the use of heparin No

Line Type Implanted Vascular Access Device (IVAD) Venous Non-Valved

## Release Infusion Therapy Plan Orders

1. Select the blue hyperlink to navigate to the therapy plan.

INFUSION THERAPY PLAN INFORMATION

Plan Summary

Instructions

HYDRATION

Close

Type: Infusion Therapy 1

Current Treatment: Not Signed

Planned For: Today

Status: 0/27

Previous Next

2. Click the **Begin Treatment X**.

HYDRATION Plan start: 10/26/2021 Linda A Ward, M.D. – Properties

Begin Treatment 1

Order Filters: ☒ All ☐ Due ☐ PRN ☐ Future

3. The green header and check marks indicate the orders have been signed.
4. Review your orders.

Hydration

Due: 5 due orders have not been released

Nursing Orders

Vital Signs Once 1/1 remaining Tue 10/26/2021

As needed, Starting when released, Until Specified

Each visit and per IV Administration Guidelines (IVAG) or medication manufacture guidelines when IVAG not present.

Notify Provider Vital Signs Once 1/1 remaining Tue 10/26/2021

Until discontinued, Starting when released, Until Specified

Systolic blood pressure less than: 90

Heart rate greater than: 140

Heart rate less than: 50

Respiratory rate greater than: 24

Respiratory rate less than: 12

SpO2 less than: 90

Notify Provider Once 1/1 remaining Tue 10/26/2021

Until discontinued, Starting when released, Until Specified

Notify provider for change in patient condition, critical lab results or infusion reaction.

Vascular access permissions Once 1/1 remaining Tue 10/26/2021

Place peripheral IV if no vascular access available: Yes

May use existing dialysis catheter for blood draws: Yes

Until discontinued, Starting when released, Until Specified

Nurse may initiate Nurse Protocol Once 1/1 remaining Tue 10/26/2021

Nurse may initiate: Vascular Access Patency

Until discontinued, Starting when released, Until Specified

5. Make sure all due orders are checked, then **Release**. If you aren't sure if an order is due, reference the 'Interval', 'Due', and 'Last Released columns' within the therapy plan. If there are PRN medications, those should not be released unless they are going to be administered.

Begin Treatment 1 Select Orders Release

Close

6. Upon release, medication orders will appear on the MAR.

## Administer the Medication(s)

The MAR activity must be used to document medication administration from an infusion therapy plan.

1. Open the MAR. If it is not a default activity, it can be found through **More**.
2. If there is a barcode scanner available scan the medication now. If there is no barcode scanner, click on the due time on your MAR. (Note: this screenshot is from the outpatient MAR. If you work in an inpatient area or infusion center, the MAR will look a little different).

Active Therapy Plan: HYDRATION

Office Visit from 10/22/2021 in Department of Oncology in Rochester, Minnesota [Adjust Due Times](#)

NaCl 0.45 % bolus 500 mL ☐ Dose: 500 mL : 250 mL/hr : intravenous : Once ! 0900 Due

Ordered Admin Dose: 500 mL

3. If unable to barcode scan the medication, provide a reason.

**Product was not scanned**

Scan the barcode for NaCl 0.45 % bolus 500 mL.

Action:

Override Reason:

[Override](#) [Cancel](#)

4. Verify all information as correct in the administration window and **Accept**.

× NaCl 0.9 % bolus 1,000 mL : Dose 1,000 mL : 500 mL/hr : intravenous : Once

Ordered Admin Amount: 1,000 mL  
Frequency: Once  
Route: intravenous  
Order Dose: 1,000 mL  
Ordered Infusion Rate: 500 mL/hr  
Infused Over: 2 hours  
Administration Window: 60 minutes from the due time  
Priority: Routine  
Order ID: 5052771  
Order Start Time: Today 12/12/17 at 0945  
Administrations Remaining: 0 (+1 in progress)  
References: Micromedex  
I.V. Admin Guide  
Linked Line: Not Linked (as of Today 12/12/17 at 0944)

Next Actions  
12/12  
0945

Action: New Bag

Route:

Dose: 1,000 mL

Rate: 500 mL/hr

Infused Over: 2 Hours

Date: 12/12/2017 Time: 0944

Comment:

Billing Information:  
Medication: NaCl 0.9% IV SOLP NDC: 0264-1800-36 Lot Number:   
Billing Provider:  ☐ Patient Supplied? [Enter multiple packages](#)

Associated Flowsheet Rows:  
New Value: Date: 12/12/2017 Time: 0944 Check the box to link to previous value if no new assessment is needed

NaCl 0.9 % bolus 1,000 mL  
Volume (mL):

No data filed

You are documenting 1 administration. ✓ Accept ✗ Cancel

5. If documenting an IV infusion, document a stop time as well.
6. Click on the **Administration**.
7. Select **Edit Administration**.
8. From **Action** the drop-down, menu select stopped.

**Administration Details**

Action: New Bag

Title:

Bolus from Bag: ☐

New Bag: ☐

Started During Downtime: ☐

Restarted: ☐

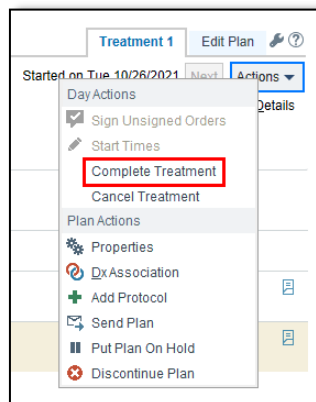
Stopped

9. Verify all information is correct and **Accept**.

## Complete Treatment

Once the medication has been administered, complete the treatment day.

1. Navigate to the **Therapy Plan** activity.
2. Select the **Therapy Plan** that contains your orders.
3. On the **Treatment X** tab, click on the **Actions** drop-down menu.
4. Select **Complete Treatment**.



## Pharmacy

### Pharmacy Resources

- [Advance Prep Reports – Basics and Workflow for Treatment and Therapy Plans QRG](#)
- [Patient Supplied \(White Bag Meds\) for Pharmacists QRG](#)
- [Verifying Therapy Plan Medications and Intervals QRG](#)
- [Pharmacy Advanced Preparation and Verification of Intrathecal Pump Refill Therapy Plans QRG](#)

## Scheduling

### Scheduling Resources

- [Office of Access Management Training Resources Page](#)
- [Therapy Plan Zero Tolerance QRG](#)

## Additional Resources

### COVID Specific Infusion Therapy Plan Resources

- [Remdesivir Infusion Therapy Plan QRG](#)
- [Bamlanivimab Infusion Therapy Plan QRG](#)
- [Nurse Administering Bamlanivimab Infusion Therapy Plan QRG](#)

### *Allergy Specific Therapy Plan Resources*

- [Allergy Therapy Plan – Order a Therapy Plan QRG](#)
- [Allergy Therapy Plans – Unable to Find Medications QRG](#)
- [Allergy Therapy Plan – Release and Document Medications/Vaccines](#)

### *Rabies Therapy Plans Resources*

- [ED: Rabies Therapy Plan QRG](#)
- [Ambulatory: Rabies Therapy Plan QRG](#)

### *Other Therapy Plan Resources*

- [Hyperbaric Therapy Plans QRG](#)
- [Synagis Therapy Plan QRG](#)
- [Intrathecal Pump Maintenance and Therapy Plan QRG](#)
- [Running MC Therapy Plan Renewal Report](#)
- [Therapy and Treatment Plans – Change Plan Provider](#)

### *Additional Links*

- [Infusion Therapy Plan FAQs](#)
- [Infusion Therapy Plan eDemo](#)

**Need to update this toolkit?** Submit a [CSE Project Intake Request](#) with requested updates.