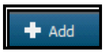
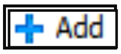
# Creating a Customised Personal Plan

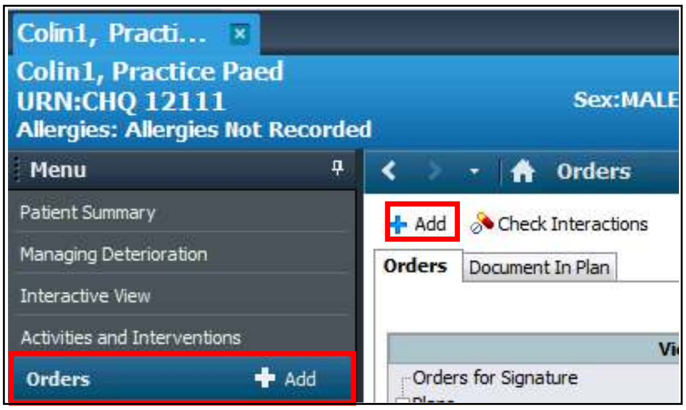
**Quick Reference Guide**

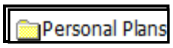
In the OERR release of *ieMR* you have the ability to create your own *Personal Plan*. This allows for efficient ordering of consistent practices. For example you could create a Septic Screen or Post-Op Orders Plan that when added will fire off a bulk list of orders saved to that *Personal Plan*.

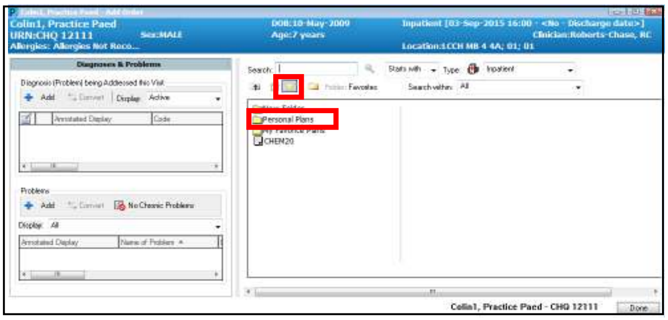
## Creating a custom Personal Plan

1. Open up a patient's medical record and select *Orders* in the *Patient Menu*
2. Click *Add* 

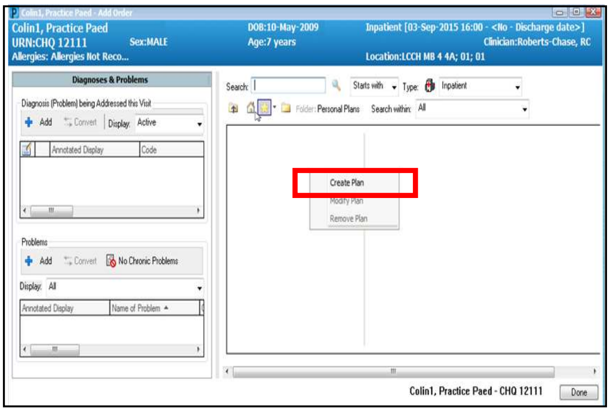
or 

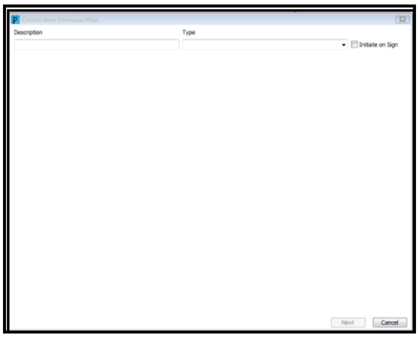

3. The *Add Order* window will appear
4. Click on the *Favorites icon* 
5. Click on the *Personal Plans* folder 

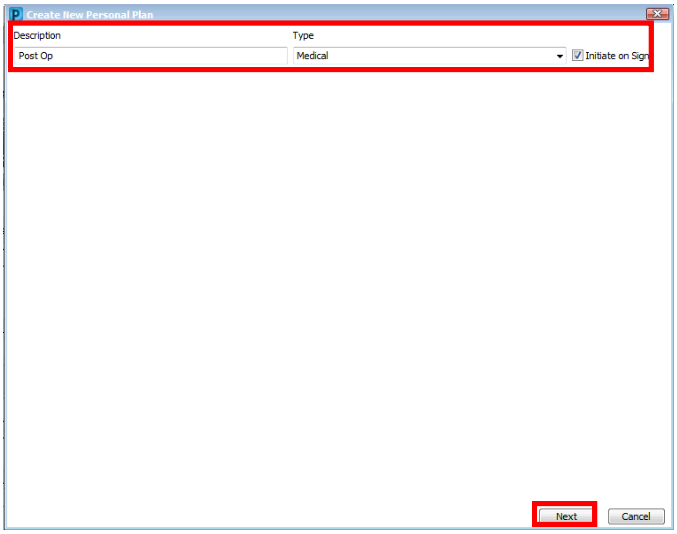
6. Right click on the blank area in the window and select *Create Plan*



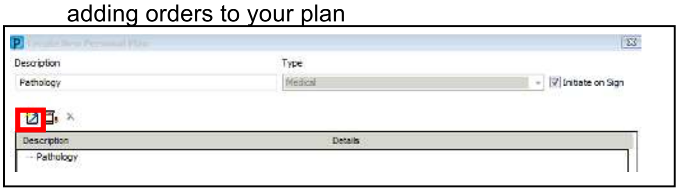
7. The *Create New Personal Plan* window will appear



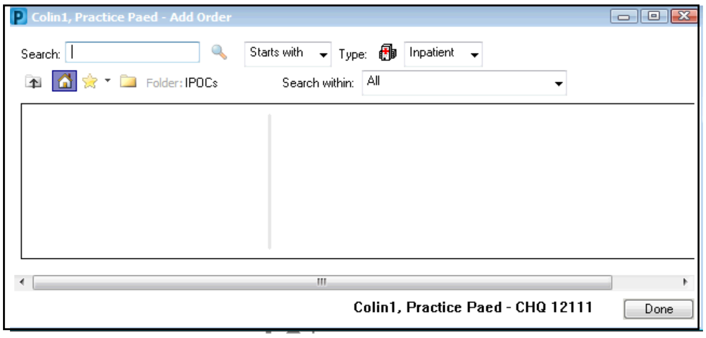
8. Enter a name for your *Personal Plan*, e.g. *Post Op* and use the down arrow under the *Type* field to select the type of plan
9. Tick the box *Initiate On Sign*
10. Click *Next*




11. After clicking next click the  icon that appears to start adding orders to your plan




12. This re-opens the *Add Order* window




13. Search and add orders as you would normally to add orders to your plan (see the *QRG – Orders* for more information on how to place orders)
14. When you have finished adding all the orders you'd like to add to your *Personal Order Plan* click *Done*
15. The *Create New Personal Plan* window will re-open and will display all of the orders you selected in step 13



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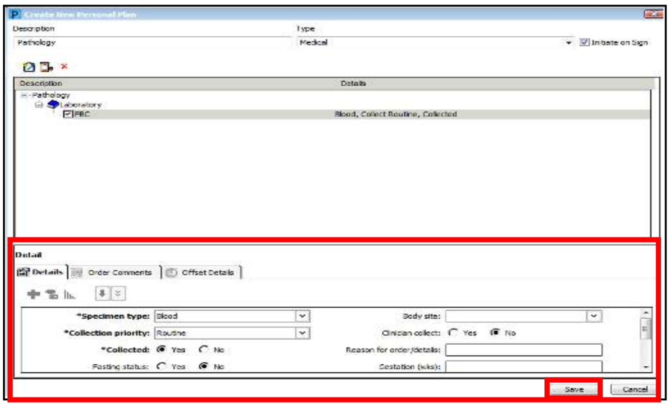
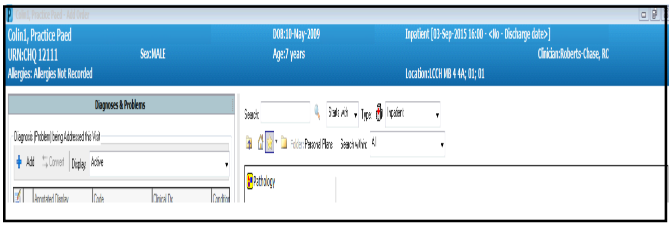
16. Double-click on an order to set the details for that order in the *Detail* section at the bottom of the window
17. In this example *FBC* details have been set to *Collection priority Routine*, *Clinician Collect Yes* and *Collected No*

Once all the order details have been set click *Save*

18.

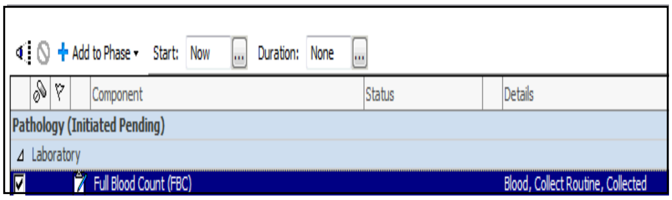


19. Your newly created *Order Plan* will now appear in the *Personal Plans* folder marked by



## Activating an Order Plan

1. To use an *Order Plan* go to *Orders* and click *Add*
2. Click then click the *Personal Plans* folder and click the plan you want to activate
3. All the orders within that plan will populate into the *Orders* window
4. Click *Done* to view the orders



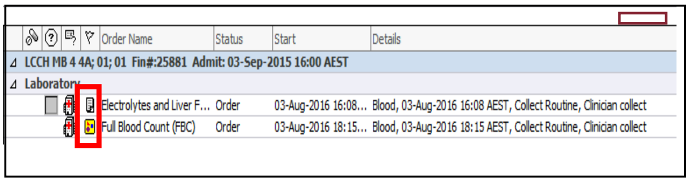

5. If desired you can alter the *Start* and *Duration* times of the plan by clicking Start: Now Duration: None in the Toolbar located above the orders
6. If required you can modify order details before signing them off
7. Right-click on the order you want to modify and select *Modify Plan*
8. Once you have altered any necessary order details click *Orders for Signature*


From the next window that appears you can add any additional orders that weren't included in the *Personal Plan*

9. Just click *Add* and place orders as you normally would
10. Once you've finished adding any additional orders click *Sign* to have all the orders actioned

Type in your *Novell password*

11. All the orders within the *Order Plan* will all have been actioned at the same time and have saved you searching and adding those orders individually
12. Any orders placed via an *Order Plan* will display the *Plan* symbol next to them




Clinicians are able to save information in the Provider number, contact details, Reason for order/detail etc fields when saving orders as part of Personal Plan.