

## Order Set Submission Checklist

V3.09122024

STEP	ASSESSMENT	COMPLETED
Search & Assessment	Evaluate for similar order sets or current order sets that can be modified to address the need. Determine if an order panel or other structured ordering mechanism may be used. Assess for potential provider specific modifications/preferences that may be saved for personal use.	
Reach	Determine system-level order set change/addition impact Review current order set utilization, if applicable.  <i>*Note: Order sets are built for system-level use. Entity specific sets are limited to hospital specific service lines or processes and evaluated on a case-by-case basis.</i>	
Outline Order Set/Order Set Changes	Utilize downtime order sets to indicate modifications to current order sets: <a href="#">Downtime Order Sets</a> <i>PDF files may be edited or annotated to include modifications in appropriate locations within the order set</i>  Utilize downtime order form to outline new order set build: <a href="#">HM Forms Home Page</a> . Navigate to Form Templates → Orders (No Lines).  Must include: <ul style="list-style-type: none"><li>• All relevant orders in consideration for order set build</li><li>• Medication strength, doses, frequencies, &amp; instructions as appropriate</li><li>• Instructions for assessments and frequency of assessments</li><li>• Timing, frequency, repeat instances of laboratory orders</li><li>• Identification of orders needing pre-selection</li></ul>	
Identify Approvers	Identify system-level approval groups/committees.  Required: <ul style="list-style-type: none"><li>• Physicians</li><li>• Nursing</li><li>• Pharmacy, if medications included</li><li>• Quality/Regulatory groups for areas with quality-based reporting (sepsis, stroke, etc.)</li></ul> Nursing or Pharmacy-led protocols require appropriate medical staff level approvals  Refer to <a href="#">System PCPS155 Order Sets, Standing Delegation Orders, and Standing Medical Orders</a> for further details on approvals and regulatory requirements.	
Order Set Request Form	Complete the order set request form indicating the need for the order set addition/change: <a href="#">Order Set Request Form</a>	
Submission & Review	Enter a ServiceNow Demand Ticket by using the <a href="#">Submit an Idea</a> pathway	
Education & Implementation Plan	Develop a staff and clinical education and communication plan for implementation. ITMatters communication may be requested through ServiceNow: <a href="#">Request IT Communications Support</a>  <i>*Note: IT Communications should not be used in lieu of targeted education &amp; communication through service lines, staff education and/or system-level committee engagement</i>	

Houston Methodist Order Set Request Form  
Please include request form in IT Service Desk Request.



Refer to policy [System PCPS 155 Order Sets, Standing Delegation Orders, and Standing Medical Orders](#) for full guidance on order set development and approval.

Submitted requests will be reviewed prior to build to ensure:

- Use of evidence-based practice
- Compliance with policy and regulatory aspects
- Appropriate system-level approvals from pertinent clinical and operational groups

By submitting this request, the requestor agrees to remain available for questions and clarifications from the review and build teams as needed and support review, education, communication, and implementation of the requested changes.

Requestor:		Date:																					
Requesting on behalf of (group, committee, or individual):																							
Order Set Name																							
Type of Request:																							
<input type="checkbox"/> Break-Fix: <i>Situations in which the system is not working as designed or where designed workflows inhibit work or cause unmanageable business, financial, or safety issues. <u>Please submit as soon as possible for timely review.</u></i>																							
<input type="checkbox"/> Enhancement <i>Requests to modify order sets with the intent of improving work processes, enhancing safety, improving proactiveness or foresight, or improving communication of information.</i>																							
<input type="checkbox"/> New Order Set <i>New order set content for orders or workflow not supported by other order sets or processes.</i>																							
Name of Approving System Committee(s) and Dates of Approval: <i>If no formal system-level committees exist, please note appropriate system subject matter expert review</i>																							
<table border="1"><thead><tr><th>Committee Name</th><th>Date of Approval</th><th>Committee Contact</th></tr></thead><tbody><tr><td> </td><td> </td><td> </td></tr><tr><td> </td><td> </td><td> </td></tr><tr><td> </td><td> </td><td> </td></tr><tr><td> </td><td> </td><td> </td></tr><tr><td> </td><td> </td><td> </td></tr><tr><td> </td><td> </td><td> </td></tr></tbody></table>			Committee Name	Date of Approval	Committee Contact																		
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Impact to Patient Safety: High Medium Low		Description of Patient Safety Impact																					
Impact on Regulatory or Accreditation:  Needed to ensure compliance with regulatory issue No regulatory requirement  Current State of Regulatory or Accreditation Completely meets regulatory need Partially meets the regulatory need Not applicable		Description of Regulatory or Accreditation Needs																					

**Request:** Include copies of order sets and evidence supporting order set practice. Downtime Order Sets are available here: [Downtime Order Sets](#). If requesting a new order set, outline desired nursing, lab, medication, consult orders, etc. as desired.

Outline Education/Communication Plan for Changes: