# Customize Your Preference List for Efficient Ordering

This tip sheet is for Inpatient Providers who place orders.

Organizing your preference list effectively can help you more quickly place orders for patients. You can create preference list sections to group orders you often place at the same time, add the orders you use most frequently, and edit the display names so the orders are easier to find. After your preference list is set up, you can browse through the orders and select quickly.

## Place Orders and Add them to your Preference List

When you place orders, you can save them to your preference list, with the frequency, route, and other details you prefer, for quick access in the future.

### Add Orders to Your Preference List

1. In the "Place New orders…" field in the Orders Sidebar, enter part of a medication or procedure name in the field. For example, enter "tymp" to search for tympanometry or "amo250" to find amoxicillin 250 mg.
2. Orders that you often place appear as you type.
   a. If you see what you're looking for, select it from the list.
   b. If the order isn't on your preference list, select the **Facility List** tab to find it.
3. Click **Accept** when you're satisfied with the order details.
4. In the Orders Sidebar next to the order, click the ☆ (favorites) icon
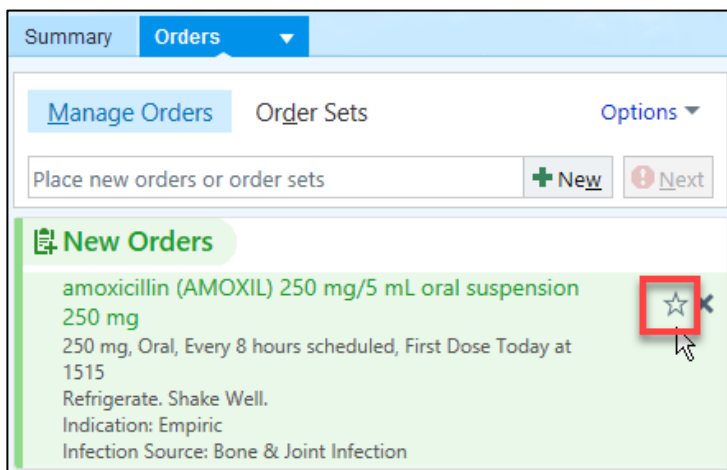


5. In the **Add to Preference List** window, enter any other details you want to use when you place this order in the future such as instructions or answers to questions and click **Accept**. Remember that these details appear only for you and you can always update them later.

   - In the **Display name** field, enter an easy-to-remember name for the order. The next time you need to place this order, you can search for your saved order using this name.
   - In the **Section** field, enter the section of your preference list in which you want this order to appear. Or, click **New Section** to add another section to your list.
   - Consider adding the same order to your preference list more than once with different display names and order details. For example, you might have one entry called "Cipro UTI 3 days" for Ciprofloxacin UTI with a dose of 250 mg Q12h x 3 days and another called "Cipro Sinus 5 days" for Ciprofloxacin sinusitis with a dose of 500 mg Q12h x 10 days.

## Browse Your Preference List

After you set up your preference list, you can speed up ordering by clicking + **New** in the Orders Sidebar. This will default to the **Browse** tab and display a preference list. Select the orders you need from the list.



- To see only **your** personal preference list entries, select the **Only Favorites** check box at the top of the Preference List Browser.
- Right-click an order in the Preference List Browser to change the details you saved, such as the display name or dose.
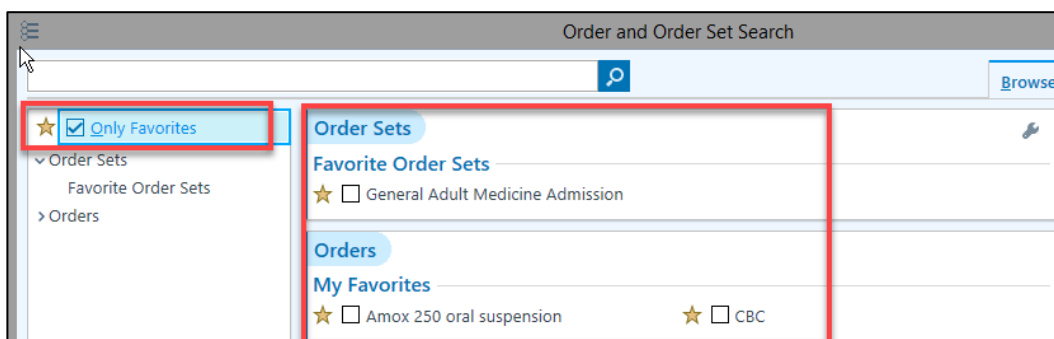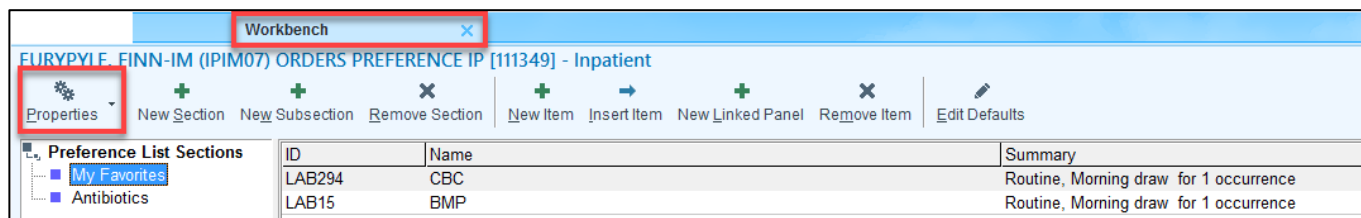
## Edit your Preference List

After you add an order to your preference list, you might want to move it to a different section, or you might change your mind about the details you specified. In the Preference List Composer, you can quickly edit order details and remove orders that you no longer use.

1. Follow the path -  **Epic button > Tools > Patient Care Tools > Preference List Composer**
2. In the **Preference List Selector** window, uncheck the **Show outpatient preference lists** to only show inpatient preference lists.
3. Double-click your **ORDERS PREFERENCE IP** list from the Preference List Selector or whatever section you chose to save your orders to.
4. Click **Edit**
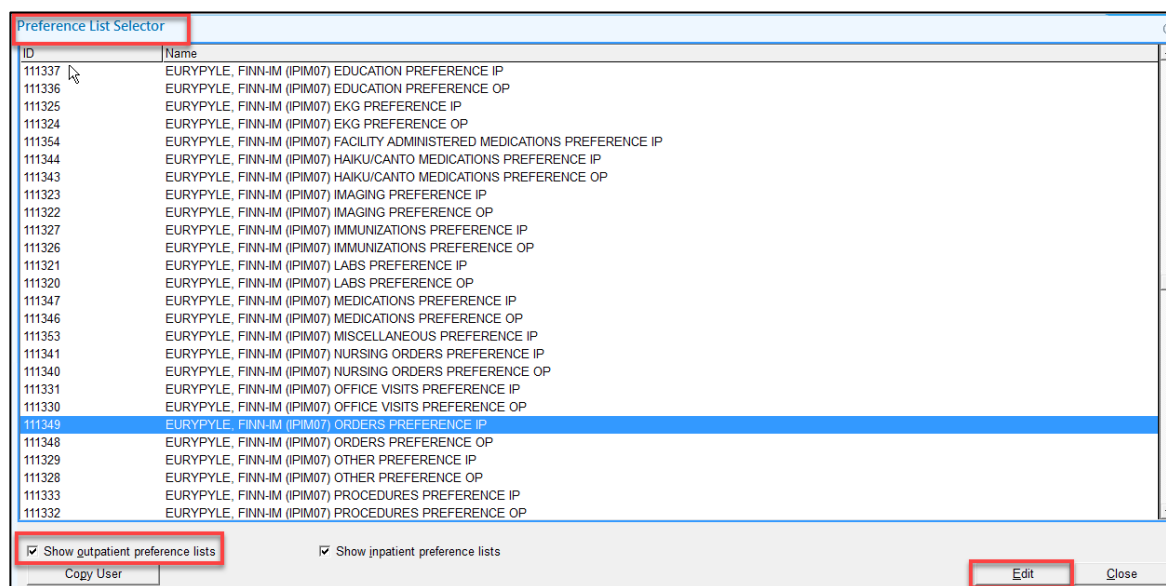


5. In the **Preference List Composer**, select the preference list section you want to edit.
6. To move an order from one section to another, click the order's name and drag it to the section you want.
7. Orders you starred automatically appear in the My Favorites section.
8. To modify details about the order such as frequency or display name, double-click the order's name. In the window that appears, change the order details as needed and click **Accept**.
9. To change the name of a section or subsection, select that section or subsection and click **Properties** in the toolbar.
10. When you are finished making changes to your preference list, click the X in the **Workbench** tab above.  All your changes are saved automatically.

| Workbench | × | |
|---|---|---|

EURYPYLE, FINN-IM (IPIM07) ORDERS PREFERENCE IP [111349] - Inpatient

Properties | New Section | New Subsection | Remove Section | New Item | Insert Item | New Linked Panel | Remove Item | Edit Defaults

| Preference List Sections | ID | Name | Summary |
|---|---|---|---|
| My Favorites | LAB294 | CBC | Routine, Morning draw  for 1 occurrence |
| Antibiotics | LAB15 | BMP | Routine, Morning draw  for 1 occurrence |

## Copy Preference Lists from Other Clinicians

To save time when writing orders, copy the preference lists that other clinicians have created for certain types of orders. Sharing and copying preference lists between clinicians also helps spread experience and expertise throughout your organization.

1. Go to **Epic button > Tools > Patient Care Tools > Preference List Composer**. The Preference List Selector opens.
2. At the bottom of the screen, click **Copy User**. The **PrefList Copy User** activity opens.
3. In the **From user** field, enter the name of the user whose preference list you want to copy.
4. Verify that your name appears in the **To user** field.
5. Select a copy option.

   - If you want to add the other user's list to your existing list, select **Merge**.
   - To completely replace your list with the other user's list, select **Replace**.

6. Select the check boxes for the types of lists you want to copy below.
7. The columns under your name and the other provider's name show how many orders are on each of your preference lists.
8. To see the orders on your colleague's list, double-click the number on his list.  To return to the copy screen, choose **PrefList Copy** tab on the far-left side of the screen.
9. Click **Copy**. A confirmation window appears. Edits you make in the new list do not affect your colleague's list.