Select the Patient

Typically, orders are placed as part of a visit. If you select the patient from the Schedule, as shown below, the order will be tied to the visit and certain fields, such as the scheduling provider, will auto-populate.

If you are placing orders for a patient between visits, you can find the patient (Select Patient on the Patient Banner) and place your orders without selecting a visit. This way the orders will not be tied to a specific appointment; however, you may need to complete a few additional fields. CROWN will highlight any required fields for you.

1. Find the patient on the Schedule.
2. Double-click the patient’s name on the schedule to open the Clinical Desktop (chart) while keeping the specific visit in context.

Assess Problems for the Patient

All problems that are assessed during the current visit will be printed on the order requisition by default. The ICD-10 codes associated with assessed problems are also added automatically to the charges for the visit, saving clicks and pop-ups during billing. If you are placing orders outside of a visit, you can skip this step. There are two ways to assess problems in CROWN:

1. For existing problems, click the assessment icon in the the Problem list in the chart. The Last Assessed column updates to the current date. You can also click the icons in the chart snapshot section on the left side of the ACI (Add Clinical Item) search box.

2. New problems are generally assessed automatically when you add them in the ACI. Just make sure the assessment icons are/remain checked – if they are not checked, just click them.
Find the Lab Test

1. Click the **beaker** on the **Clinical Toolbar**.

2. Highlight (single-click) the **one problem** for which you are ordering the test. All problems assessed during the visit will print on the requisition, but the one highlighted problem will be flagged as the **primary diagnosis** for this test.

   **Make sure only one problem is highlighted** on the left side of the ACI. Selecting multiple problems at this stage may lead to insurance/billing issues for the patient. A sample requisition is shown on the last page.

3. Select a **To Be Done** date for the test or leave the date blank. If the patient will go to the lab within the next 30 days (NYP_ClinicalLab), or six months (zQuest or zLabCorp), the best practice is to leave the date blank; it will default to today's date when you commit the order.

   If you choose a fuzzy date (e.g., before next appointment), the order will go on hold and not transmit to the performing location unless a member of your staff updates the order.

   Page 5 provides more details about when orders transmit to the various locations, how long they stay active, how long you have to edit an order, and a description of fuzzy dates and how they impact transmission.

4. Set the **Performing Location**. The Performing Location is where the patient will have their blood drawn or where a technician will collect their sample (e.g., urine).

5. Type part of the test name in the **search box**, and click the **magnifying glass**, or press **Enter**. Notice that the performing location is also indicated at the beginning of each search result. This is where the patient’s sample will be collected.

   **Note:** it is not necessary to choose a **Priority** as all outpatient test orders transmit to the performing location as Routine, even if you choose another priority, such as STAT.
Select the Lab Test and Complete the Order Details

1. Check the box for the correct lab test. If more details are required, the Order Details screen will open. Required fields are highlighted in yellow. You cannot proceed until all required fields are complete.

Even if no more information is needed, you still have the option to view/update the details. To do so, right-click on the test name and choose Edit.

2. Verify that only one problem is listed in the For box. This is the primary diagnosis for this test.

3. Check the Perform section. Send to Performing Location means this is an electronic order.

4. Leave Print Copy checked. CROWN will print the requisition for you to give to the patient.

5. If you are entering this order for someone else, select their name in the Ordered By field. A description of each field is provided on the next page.

6. If you are finished placing orders, click Save and Close ACI. Otherwise, click Save and Return to ACI and finish finding and placing your orders. Note: These buttons are greyed out if any required fields are empty or if no changes were made.
Ordered By, Supervised By, and Managed By

Ordered by: The person who will receive the verification task. This must be a provider* (NP, PA, MD, DO).

Supervised by: The billing provider. Same as Ordered by, except for non-billing fellows. (Use the Attending or Billable provider).

Managed by: Auto-populates to Ordered by but does not need to be changed (field data is not used in CROWN).

*Your practice may have delegation set up to forward the review task to a non-provider designee. Click here to view the policy on the ColumbiaDoctors website.

Commit (Save) the Order

1. If the ACI is still open, click OK.

2. Click Commit on the Clinical Toolbar.

3. Click Save and Continue on the Encounter Summary.

Tip: Review placed orders (in the Orders tab in the chart) to ensure that they are in an Active Status, or will be placed in an Active status according to your department’s workflow. Only Active orders are transmitted electronically. On Hold orders do not transmit to the lab until updated by your staff.
Order Transmission Rules (Labs and Radiology)

Orders transmit to the Performing Location once they become Active in CROWN based on the time table below. Note that orders placed on hold do not transmit. This occurs when a fuzzy date is selected or when the order requires administrative updates, such as financial authorization or scheduling.

Orders on hold in CROWN are placed on the Worklist for your administrative/front desk staff to update. Instructions for your staff on how to find and edit these orders are provided in the Order Management section of the CROWN website.

To avoid fuzzy dates, the best practice is to leave the To Be Done field blank so that it will default to today.

If you must select a future date, make sure you do not choose any of the text options (e.g., Before next appointment) or change the radio buttons on the top to Before, After, or Approximately. Doing so will place the order on hold in CROWN, and it will not transmit to the performing location unless a member of your staff updates the order with a real date.

<table>
<thead>
<tr>
<th>Performing Location</th>
<th>Active Order Can Be Edited Up To</th>
<th>Order Stays Active At The Performing Location For</th>
</tr>
</thead>
<tbody>
<tr>
<td>NYP_ClinicalLab</td>
<td>2 days before To Be Done date</td>
<td>30 days</td>
</tr>
<tr>
<td>zQuest and zLabCorp</td>
<td>12 days before To Be Done date</td>
<td>6 months</td>
</tr>
<tr>
<td>All Radiology Locations</td>
<td>62 days</td>
<td>1 year</td>
</tr>
</tbody>
</table>

NewYork-Presbyterian Talent Development
Edit or Cancel an Order

1. Find the order in the Orders tab in the patient’s chart.
2. Right-click and select **Edit** or **Cancel**. If you choose Edit, the Order Details window will open and you can make your changes.
3. **Commit** your changes.

Verify the Results

Providers: Remember to use the **Worklist** to verify your results. You can also order new tests on patients in your worklist. By selecting a patient on the **Worklist** you will tie the new order to the same visit details of the existing lab you are verifying. Just click the **beaker** on the **Clinical Toolbar** to order the new test.
### Sample Requisition

<table>
<thead>
<tr>
<th>Code</th>
<th>Test Name</th>
<th>CPT4</th>
<th>Order #</th>
</tr>
</thead>
<tbody>
<tr>
<td>[289214424]</td>
<td>[Complete Blood Count]</td>
<td></td>
<td>[R03]</td>
</tr>
</tbody>
</table>

**Diagnosis:** (A63.0, C80.1, L65.9, M24.669)

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**Other diagnoses assessed during the visit**

**The primary diagnosis linked to this order**

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**CROWN Lab Order Entry**

**Performing Facility:** NYP_ClinicalLab

**Req #:** 605079665  
**Eagle Acct #:** 605079665

**MRN:** 5722455  
**DOB:** 10/28/2011

**Gender:** F

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**Collection Date:** ____________________________

**Collection Time:** ____________________________

**Phlebotomist Int:** ____________________________

**No. of Samples Submitted:** ____________________

**Attending Prov:** ALLSCRIPTS, PROVIDER

**NPI:** 12354123413  
**UPIN:** T:

**Ordering Prov:** ALLSCRIPTS, PROVIDER

**Vascular Medicine Clinic**

173 Fort Washington Ave 4th Floor, New York, NY 10032

**T:** (444) 555-6666  
**F:** (777) 888-9999

**Insurrence**

AETNA (EL PASO, TX)  
**T:** (800)624-0756

PO BOX 981106  
**Group #:** 0865295010

W/P/NF: No

**Name of insured**

WOOD, COURTNEY [Dependent Child]

**DOB:** 28-Jul-1976  
**T:** (718) 909-1843

**Address:**

EL PASO, TX 79908-8806  
800 GREENWOOD AVE  
BROOKLYN, NY 11218-1332

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**Expected Test Date:** 06 Jun 2017