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DeliverHealth

Manually Creating Orders in InQuiry

Quick Reference Guide

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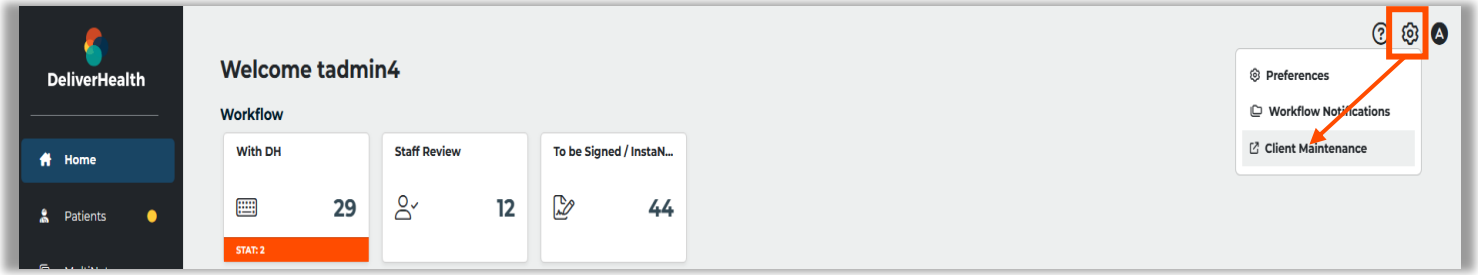
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Opening Client Maintenance

Orders are created manually in Client Maintenance.

Note: Client Maintenance is only available to users who have been granted access.

- From the InQuiry screen, tap the **Settings** (gear) icon in the upper-right corner.
- Select **Client Maintenance** from the menu. Client Maintenance opens in a new browser tab.



- In Client Maintenance, open the **Maintenance** menu and select **Patients**.

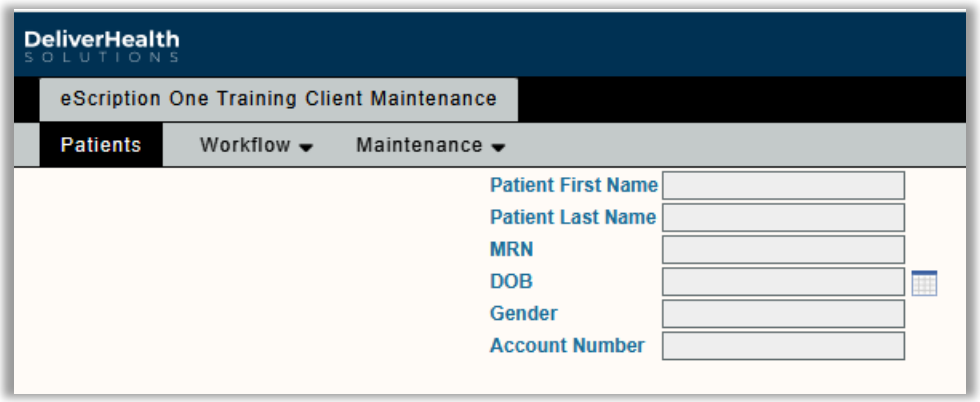


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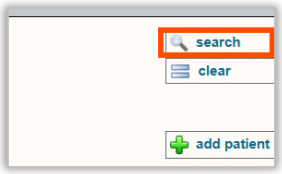
Locating the Patient

The Patients screen lets you search by Patient First Name, Patient Last Name, MRN, and more.

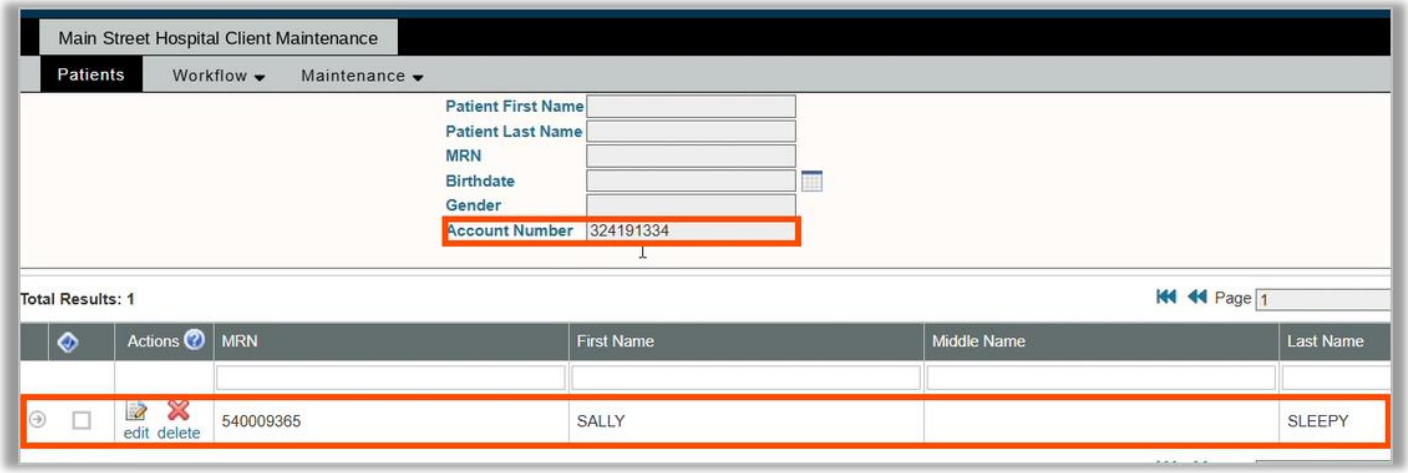
- Enter your search criteria (for example, the patient's **Account Number**).



- Tap **search** on the right side of the screen.



- The matching patient displays in the results grid.



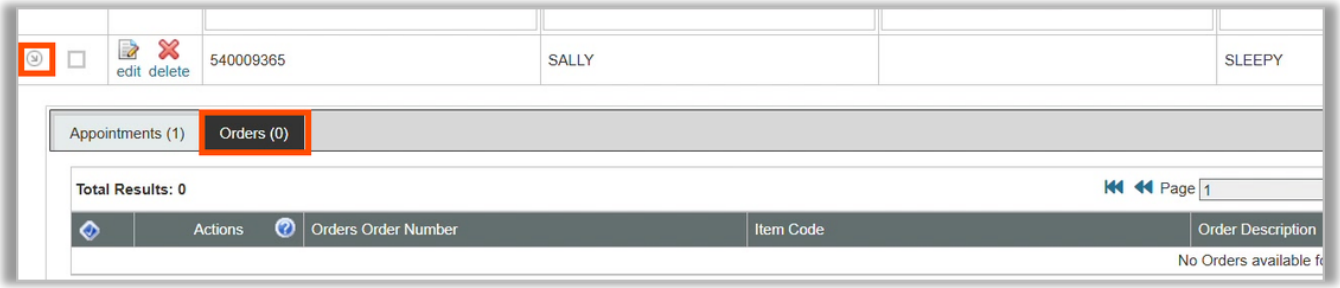
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Manually Creating an Order

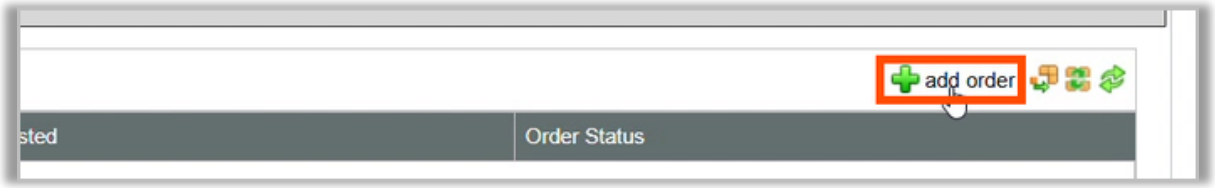
- Tap the expand arrow at the far left of the patient row.

The **Appointments** and **Orders** tabs display below the patient.

- Tap the **Orders** tab. The number in parentheses shows how many orders the patient already has.



- Tap **add order** on the right side of the Orders tab.

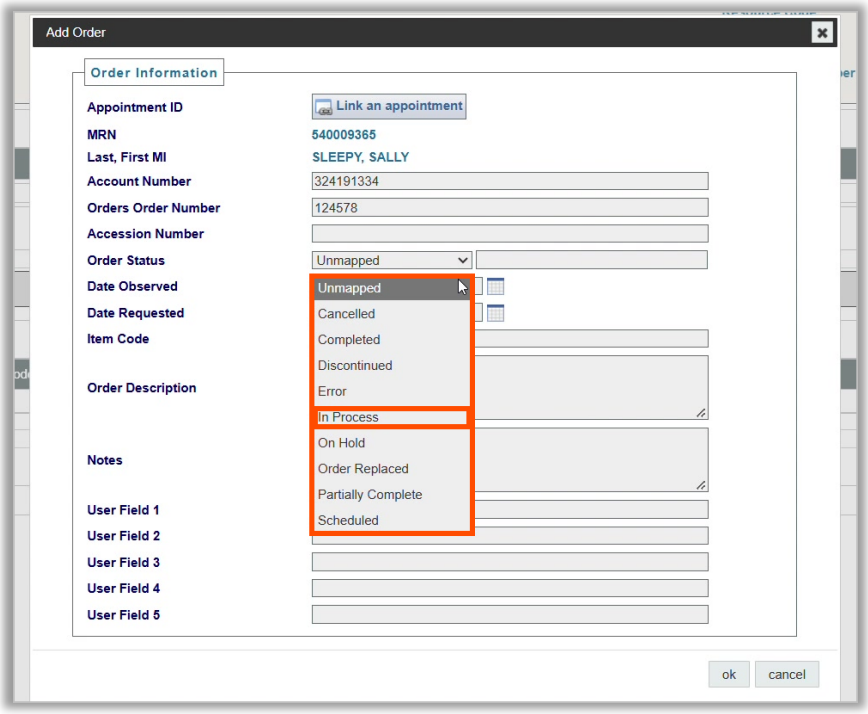


Complete the Add Order Window

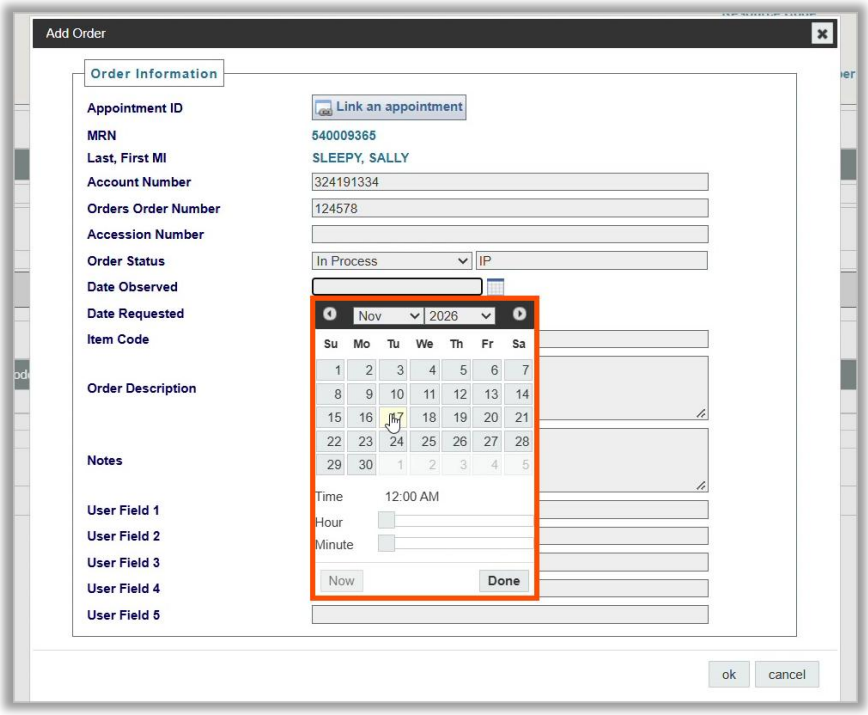
The patient's **MRN** and **Last, First MI** fill in automatically. Complete the remaining fields:

- **Appointment ID** – tap **Link an appointment** to link the order to one of the patient's existing appointments, if needed.
- **Account Number** – enter the patient's account number. You can find it on the patient's **Appointments** tab.
- **Orders Order Number** – enter the order number.
- **Accession Number** – enter this if your organization uses it.
- **Order Status** – select the status from the drop-down (for example, **In Process**). The matching status code fills in next to it (IP for In Process).

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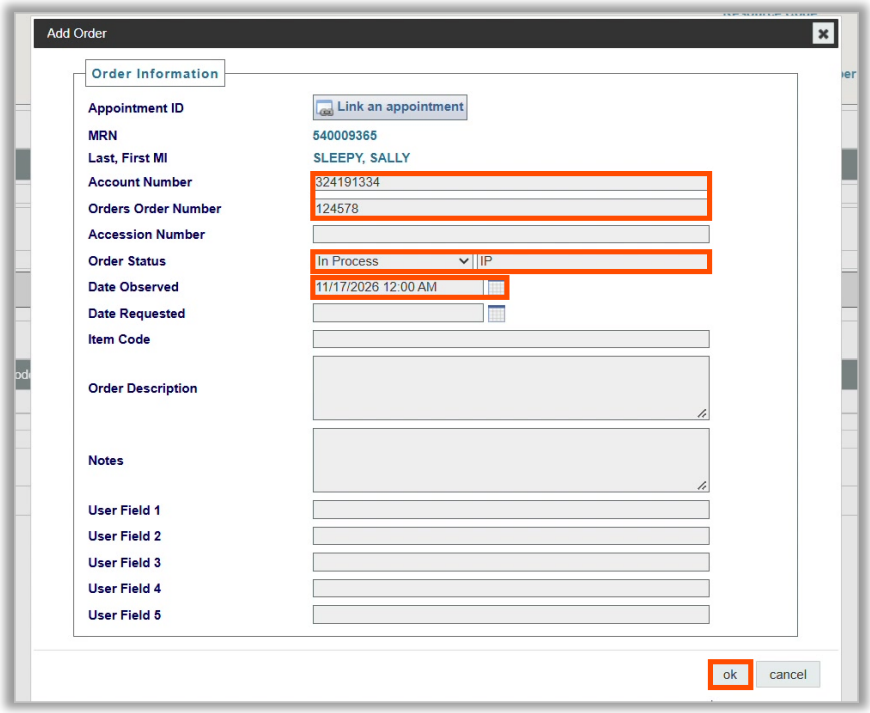
- **Date Observed** – tap the calendar icon, select the date, use the **Hour** and **Minute** sliders to set the time, then tap **Done**.



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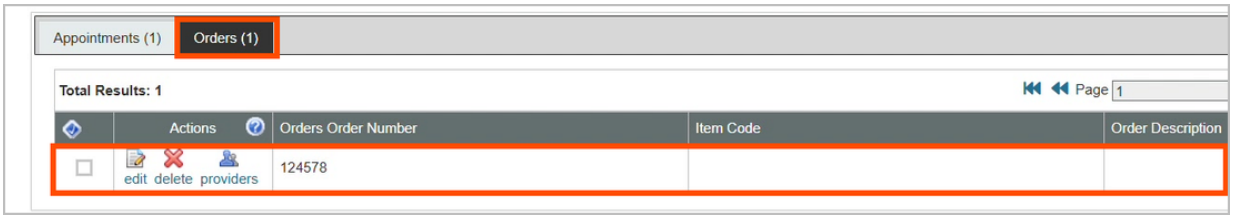
Date Requested, **Item Code**, **Order Description**, **Notes** and **User Fields 1–5** are optional.

- Tap **ok** to save the order or **cancel** to close the window without saving.



Review the Order

The new order displays on the patient's **Orders** tab, and the tab count increases by one. The Order Status column shows the status you selected.



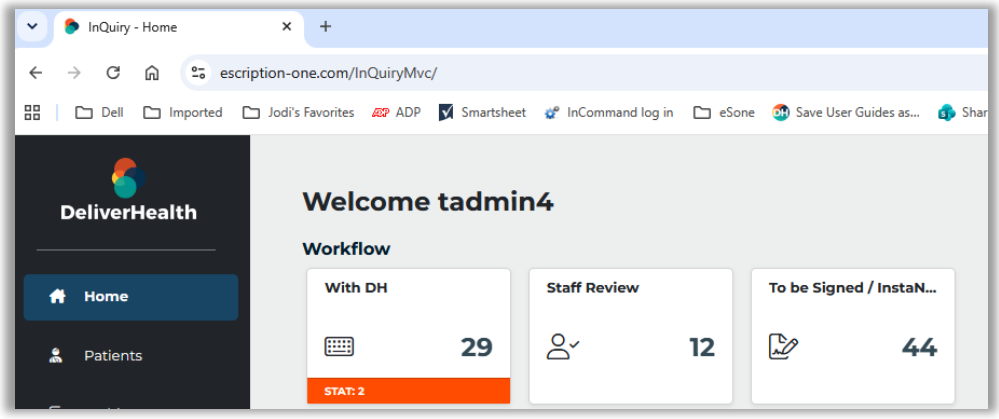


Use the **edit**, **delete** and **providers** icons in the Actions column to make changes to the order.

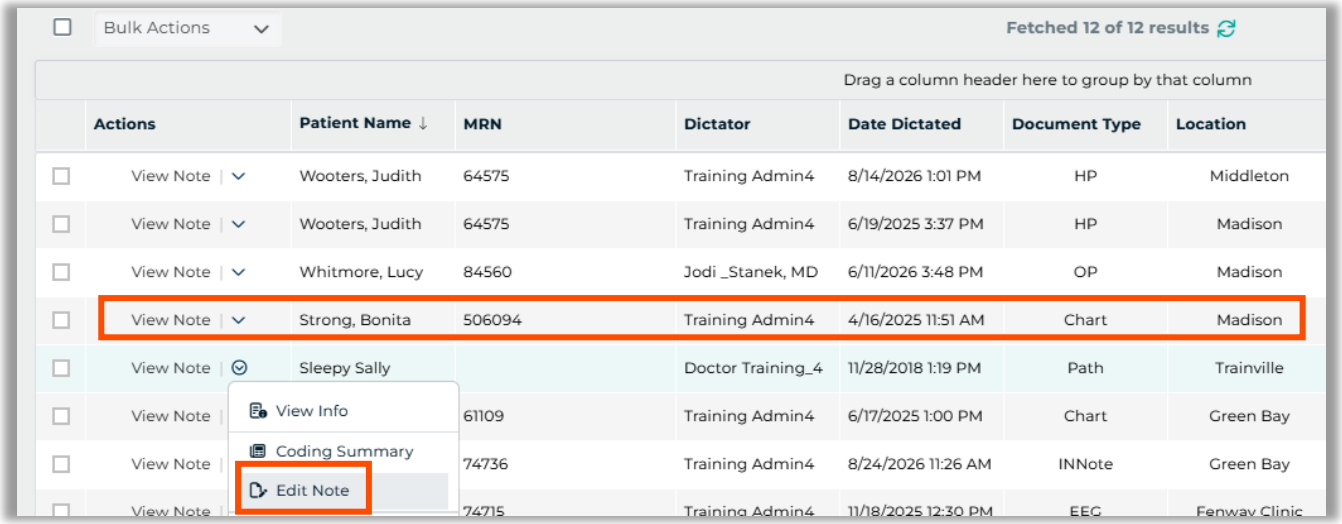
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Attaching the Order to a Note

Return to the InQuiry browser tab and select the workflow folder (**Staff Review**).



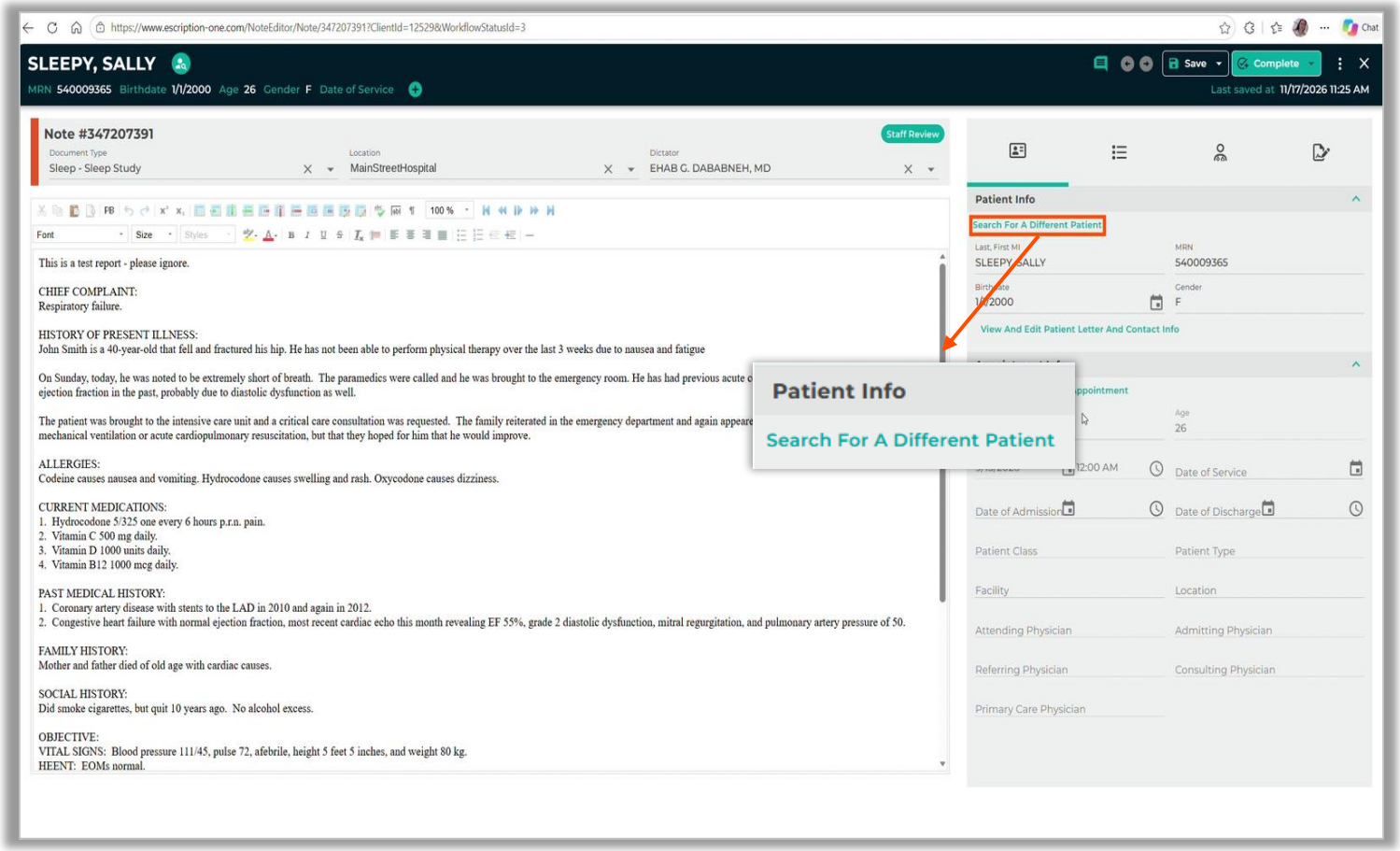
- Select the patient from the Staff Review grid by either clicking View Info and tapping Edit Note or tapping anywhere on the row.



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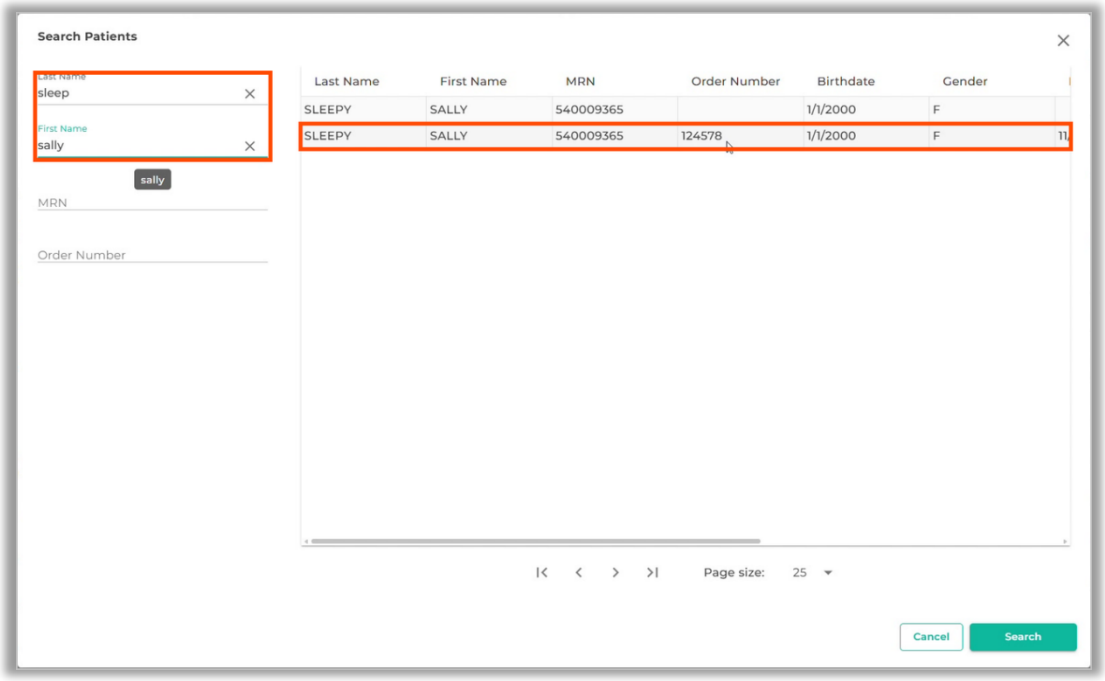
The Note Editor launches.

- In the side panel under **Patient Info**, tap **Search For A Different Patient**.
-

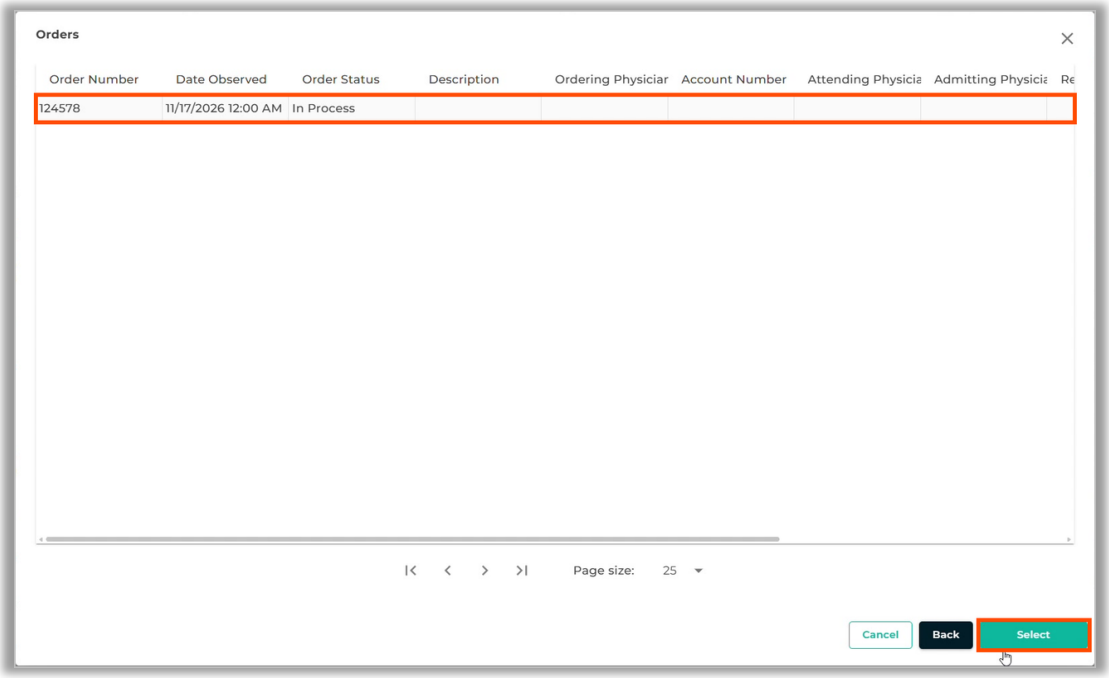


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- In the **Search Patients** window, enter the patient's **Last Name** and **First Name** (or MRN or Order Number), then tap **Search**.
- The result shows one row for each of the patient's orders. Select the row that shows the **Order Number** you created.

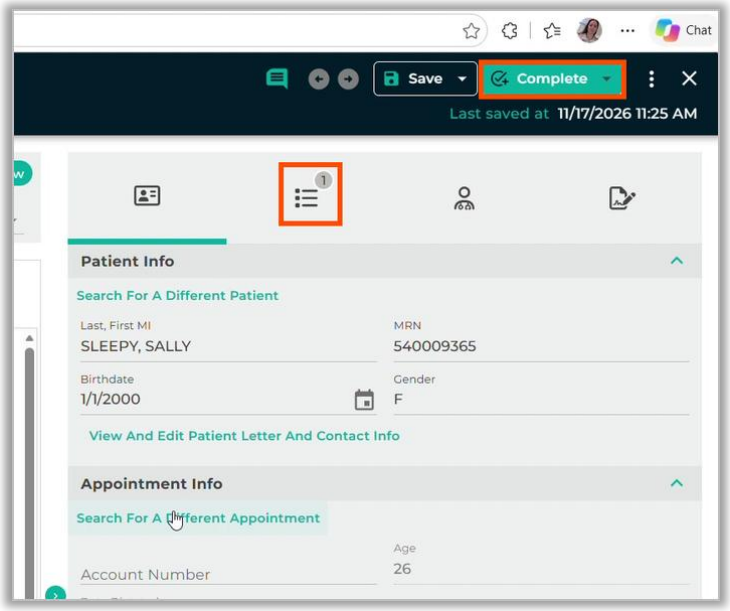


- The **Orders** window lists the order details. Select the order, then tap **Select**. Tap **Back** to return to the patient results, or **Cancel** to close without making changes.



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- The order is now attached to the note. The **Orders** icon in the side panel shows a badge with the number of attached orders.



Completing the Note

- When you have finished reviewing the note, tap **Complete** at the top of the screen.



- When asked “Are you sure you want to Complete this note?”, tap **Yes**. Tap **No** to return to the note.

Completing a note moves it through the next stage of the workflow.

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