



Monday Morning Practice Pearls #15

How do I create, modify, or delete a protocol order set in CRIS?

A protocol order set is a grouping of orders that standardizes and expedites the ordering process for protocol specific procedure. This helps to ensure protocol compliance. The overall process is noted in the schematic below:



There are 2 ways to create or make changes to a protocol order set:

Option #1 - Submit a DCRI Request Form:

- a. Use the [DCRI Request Form](#) to organize your orders chronologically and/or by category when creating a new order set. When requesting changes to an existing order set, list your modifications on the request form. Screen captures with revisions on them are also acceptable.
- b. If the proposed order set contains orderable items from other departments (e.g., DLM, DTM, Pharmacy, Radiology, specifically MRI, nutrition), the relevant content will need to be reviewed and approved by the department contacts. Obtaining these approvals prior to the draft request submission will help expedite the development process once the order set request has been submitted. This step is not required for initial/draft submission but is required before the order set can be finalized and activated in CRIS. Once obtained, include a written copy of the approval with your content submission.
- c. However, “Other Mayo Labs” require prior approval from DLM. See [CRIS website](#) for contact information for DLM.
- d. Once the approval is obtained, attach a written copy of the approval with your content submission.
- e. Use the CRIS application to assist in identifying the names of order(s) you need in the protocol order set. [CRIS website](#) provides additional information. Providing accurate CRIS order names and content for mandatory fields will help expedite the development process once the order set request has been submitted.
- f. If you have an existing protocol order set in CRIS that is very similar to the design you are looking for, DCRI may be able to copy and modify this set to meet the new protocol’s needs. Mention this on the request.
- g. Attachments or screen images that clarify the design requirements are encouraged due to space constraints on the request form. ***Please exercise caution to protect all Personally Identifiable Information (PII).***
- h. Once all information is collected on the request form and is completed including **all protocol specific procedures (e.g., labs, vital signs, PKs, and other research**

samples), obtain a signature from an authorized official (i.e., PI or AI) and email the request form to [CC-DCRI Protocol Order Set Team](#).

Option #2 - Request • Notify • Administer (RNA) Website

- a. Use the [Request • Notify • Administer \(RNA\)](#) to create, modify, or delete an order set.
- b. Contact your team lead about RNA training.
- c. Firefox is the preferred browser when using the RNA application. Chrome or Safari works also. Internet Explorer does not interact well with the RNA application.

Note: A protocol number will be needed before the protocol order set can be finalized and deployed in CRIS. Generally, a protocol order set takes 4-6 weeks for development. More complex order sets may take longer. Delivery time may change. If you have any questions, contact the [CC-DCRI Protocol Order Set Team](#).