

Biotherapy Tools – Tip Sheet for Building Order Templates

 Protocols and treatment plans are built and stored separately for the two main specialties, oncology and non-oncology. Providers writing orders for oncology treatments can select only oncology templates; non-oncology providers can select only non-oncology templates.

Opening the Builder for Oncology or Non-oncology

1. Log on to the Biotherapy Tools application for your site.
2. Hold the mouse pointer over the Builder option, and then over the specialty option you need, Oncology or Non-oncology.
3. Click the Builder Editor option.



Pointer over Oncology Builder Editor option



Pointer over Non-Oncology Builder Editor option

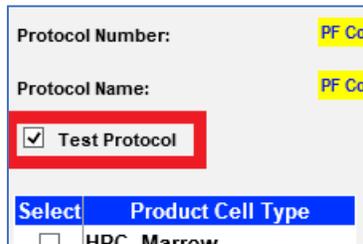
Adding a new protocol or treatment plan

1. Open the Oncology or Non-oncology builder as applicable. See previous for instructions.
2. Click **Add Protocol** or **Add Treatment Plan**.
3. Type the protocol (5-digit) or treatment plan (3-digit) number and name in the text fields. Press TAB to move to the next field quickly.
4. Click the **Save** button.
5. A message displays if the new protocol or treatment plan is not registered. To continue building, with the understanding that the protocol or treatment plan will be registered in the future, click **OK**. Otherwise, click **Cancel**.
6. Select the product cell type(s) as needed. See following for instructions.

Setting the protocol, default group, or treatment plan to Test mode

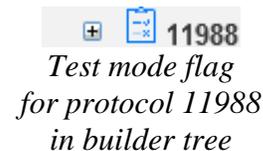
Test mode prevents protocols and treatment plans from appearing in BOE for providers. Only users who are authorized for test mode see these test protocols and treatment plans in BOE when writing orders.

Click the Test checkbox beneath the Name field for a protocol, treatment plan, or default group to set it to Test mode.



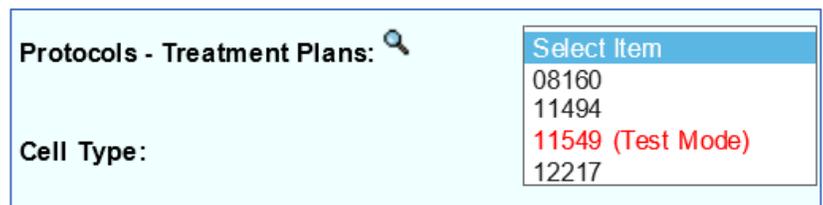
Test checkbox for a protocol

Protocols, treatment plans, and default groups that are set to Test are flagged  with in the builder tree.



Test protocols/treatment plans display with red text and (Test Mode) in BOE for authorized users.

Test Mode protocol 11549 in BOE



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Selecting the cell type(s)

1. The label is red for a newly added protocol or treatment plan, which shows that it is selected. (To add a new cell type to an existing protocol or treatment plan, click to select it.)
2. Click the check box for each applicable Cell Type.
3. Click the **Save** button.
4. Set up the template(s) for each product cell type. See following for instructions.

The screenshot shows a 'Treatment Plans' section with two plans: 0714 and 900. Plan 900 is highlighted in red. Below it, two cell types are listed: 'HPC, Apheresis' and 'HPC, Marrow', both with red labels and pencil icons. To the right, a form for 'Treatment Plan Number' and 'Treatment Plan Name' both set to '900' is shown, with red asterisks indicating required fields. A 'Test Treatment Plan' checkbox is checked. Below this is a table for selecting product cell types:

Select	Product Cell Type
<input type="checkbox"/>	HPC, Cord Blood
<input type="checkbox"/>	MNC, Apheresis
<input type="checkbox"/>	Malignant Cells
<input type="checkbox"/>	NC
^^^ Available Options ^^ vvv Current Options vvv	
<input checked="" type="checkbox"/>	HPC, Apheresis
<input checked="" type="checkbox"/>	HPC, Marrow

A 'Save' button is located at the bottom right of the form.

Product Cell Type selections for example template (900)

Setting up the first template for a product cell type

1. If needed, click to select the product cell type. (The label for a selected item is red.)
 2. Type the name of the template. The version number is set to 1.0 by default.
- Templates for ordering reprocessing on existing product should be labeled "xxxx Release to Process" where "xxxx" is the number of the protocol or treatment plan.

The screenshot shows a 'Template Name' field with a yellow highlight and a red asterisk. Below it, the 'Version No' is set to '1.0'. At the bottom, three checkboxes are checked: 'Collection', 'Process', and 'Release'.

Template name, version number, and order type options

3. By default, all three (3) order types are selected: Collection, Process, Release. If any of these is not applicable to the template, click to uncheck its box.
4. To copy an existing default template:
 - a. Click to check Use Default Template.
 - b. Click to check the default group that includes the template to copy.
 - c. Click to check the template to copy. Only VERIFIED templates are available for copying.
 - d. Click the **Save** button.

The screenshot shows three selection sections:

- 'Use Default Template' with a checked checkbox.
- 'Default Group(s)' with two options: 'HPC Allo' (checked) and 'HPC Auto Adult' (unchecked).
- 'Default Template' with two radio button options: 'HPC(CB) [ADULT]' (selected) and 'HPC(CB) [PEDI]' (unselected).

A 'Save' button is located at the bottom.

Default template option selected

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5. If applicable, for DFCI only, click to select one or more functional groups to assign to the template. Providers who are part of a functional group are notified when there are orders written on the assigned template awaiting confirmation.

*Functional
Group
options*

Select	Functional Group Name
<input type="checkbox"/>	Adult Allogeneic Transplant
<input type="checkbox"/>	Adult Autologous Transplant
<input type="checkbox"/>	GU/Provenge
<input type="checkbox"/>	IS Testing 25
<input type="checkbox"/>	Pedi Transplant
<input type="checkbox"/>	Tumor Vaccine
	^^^ Available Options ^^
	vvv Current Options vvv

6. Click the **Save** button.
7. For each template:
- If you copied a default template, add and edit the collection, process, and release order options and parameters as needed.
 - If you started with the automatic blank template, add and set up the collection, process, and release order options and parameters as needed. collection, process, and release order options and parameters as needed. See following for instructions.

Adding or editing Collection, Process, and Release ordering options as applicable

1. Click to select an order type in the list to the left: Collection Options, Process Options, or Release Options.
2. Options are pre-checked when required for all orders of the selected type. Click to check other options as needed.
 - For collection orders, to prompt automatically for a process order after signing, click to check the Process Order Prompt option.
 - For process orders, to prompt automatically for a collection order after signing, click to check the Collection Order Prompt option.
 - For templates to reprocess existing product, click to check Release to Process and its Pre-selected checkbox.
3. To set a parameter as the default, click to check Pre-Select.
4. Click the **Save** button.
5. Repeat for each selected order type (collection, process, release).
6. Set the parameters for each selected option. See following for instructions.



If an order type is excluded from the template (unchecked in the template heading), the message for users attempting to write that type of order displays:

The design of the template does not allow that type of order, along with the reason:

- Collection occurs outside of standard collection facilities.
- Processing is performed off-site.
- Release of fresh product is implicit in the processing order and storage of products is not allowed.

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Setting the parameters for each selected option

1. Click to select the option listed on the left.
2. Click to check parameters on the right as needed.
 - For donor type, check Weight, Height, and/or Blood (ABORh type) if required by the treatment. For donations other than autologous, this information can be required for the donor (dWeight, dHeight, dBlood), the recipient (rWeight, rHeight, rBlood), or both.
 - For Maximum Number of Collections, select from the drop-down list.
 - For the Collection option of Process Order Prompt, click to select at least one (1) donor type.
 - For the Process option of Collection Order Prompt, click to select at least one (1) donor type.
 - For Release to Process templates, select the ReProcess option for Collection Location and Product Collection.
 - For Collection, Process, Release, or Administration Instructions, type information as needed. The text field can be left blank for the ordering provider to complete. Instructions included by the builder on the template can be edited by the ordering provider.
 - For Guidance Instructions, presented as a message to the ordering provider on opening the order, type information for the provider. This information cannot be edited when ordering.
 - To set a default for parameters with text input fields, including the Other option in drop-down lists, type the default text in the Enter Input field to the right.
3. Click the **Save** button.
4. Repeat for all selected order options, and for each selected order type (collection, process, release).
5. Review the details of the template before activating. See following for instructions.

Viewing and printing details of a selected template

- If you haven't already, click to select a template for a product cell type for a protocol or treatment plan, in the list on the left of the builder. Selected items are displayed in red.
- To display details of the selected template, click the **View** button, above the right side of the display.
- To generate a paper copy of the detail view of the template, click the **Print** button.
- To return to the builder, click the **Close** button.

 A template must be activated to be available to providers from Biotherapy Order Entry (BOE).

Activating a template

1. If you haven't already, click to select a template for a product cell type for a protocol or treatment plan, in the list on the left of the builder. Selected items are displayed in red.
2. Click the **Activate** button.
3. When prompted, sign by typing your Partners password, and then clicking the **OK** button.
4. For activation, the builder checks the options and parameters for all the selected types of orders—collection, process, release—for mismatches and missing requirements.
 - If a mismatch is found that would cause ordering malfunctions in BOE, you are prompted to correct the listed mismatches. The template cannot be activated until you make the corrections.
 - a. Make a note of the missing information listed in the message, and then click the **OK** button.
 - b. Complete the template to include the missing options. When you're finished saving the updates, click the **Activate** button and sign again.
 - If a mismatch is found that would NOT cause ordering malfunctions in BOE, when prompted to correct the listed mismatches.
 - a. Make a note of the missing information listed in the message.
 - b. If you want to correct any mismatches, click the **Cancel** button; otherwise, click the **OK** button to complete the activation.
 - c. If you canceled, correct the mismatches to complete the template; when you're finished saving the updates, click the **Activate** button and sign again.

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Copying an activated template to create a new version

 You can use the versioning option to update an existing, activated template for the product cell type, or as a copy from which to start a new, additional template for that product cell type. The new template can't be copied to a product cell type in a different protocol or treatment plan.

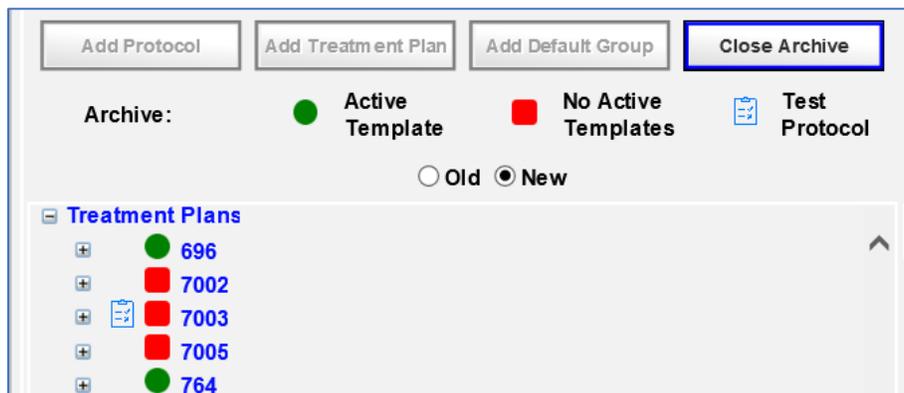
1. If you haven't already, click to select a template for a product cell type for a protocol or treatment plan, in the list on the left of the builder. Selected items are displayed in red.
2. Click the **New Version** button.
3. The name of the template is not changed. The version number is incremented automatically by point one.
4. If needed, type to change the version number. If you are using this copy as a starting point for a new, additional template, start with version 1.0.
5. If you are using this copy as a starting point for a new template, type a new name for the template.
6. Click the **Save** button.
7. When prompted, type your Partners password, and then click the **OK** button.
8. Update the options and parameters as needed for the new template, and then activate it.
9. If the new template is replacing an existing, active template, archive the old version to remove it from use in BOE.

Archiving (inactivating) a protocol, treatment plan, product cell type, or template

 Inactivated items are stored in the builder Archive. An archived template cannot be activated again.

1. If you haven't already, click to select a template, product cell type, protocol, or treatment plan in the list on the left of the builder. Selected items are displayed in red.
2. Click the **Inactivate** button. This removes the selected item from use in BOE.
3. When prompted, sign by typing your Partners password, and then clicking the **OK** button.

In the Biotherapy Builder Archive, protocols and treatment plans are flagged to indicate whether there is an active template. The Archive displays a legend for the flags.



Builder Archive showing flags on Treatment Plans (legend above tree)

 To find an inactivated template, click the **Archive** button. The structure is the same as the active builder: A protocol or treatment plan contains one or more product cell types, which contain one or more templates. From the archive, to return to the active builder, click the **Close Archive** button.