

Healthfinch Embedded Refill Management application is a rules-based optimization solution that helps automate the approval process for prescription renewal requests. Once an order is proposed in Cerner, Cerner sends relevant patient and renewal request data to Embedded Refills. Embedded Refills then uses the medication protocol criteria as well as patient data to recommend an action to be taken on the renewal request.


Table of Contents

Healthfinch MPage.....	1
Refill Request from a Phone Note using Patient Care Protocol	2
Proposing Refill Request to Provider from Phone Note	3
Refill and eRx Requests using Controlled Substance Workflow	4
eRx Renewal Process Using Patient Care Protocol.....	4
eRx Renewal Process Does NOT Meet Healthfinch Recommendations.....	5
Embedded Refills Messages	7

Healthfinch MPage

A custom MPage component, accessible in the Ambulatory Summary View, is used to display Embedded Refills recommendation messages which help providers, clinical staff or a centralized team of support staff quickly and safely respond to prescription renewal requests. Any message relevant to outstanding proposals on a patient are bundled together within the MPage component and listed by category.

healthfinch

 Total Requests: 4

In Protocol (1)

Request 1 of 4
 Adult Aspirin 325 mg oral tablet
 Analgesics: NSAIDS - aspirin
 Requested Sig: 325 mg = 1 tab, PO, Daily, # 90 tab, 1 Refill(s), other reason (Rx), Rx or Hx Med
 Last ordered by Kimberly Christine Benson PA-C: 05/04/2019 QTY: 90, Refills: 1, Sig: 325 mg = 1 tab, po, daily, # 90 tab, 1 refill(s), other reason (rx), rx or hx med (unchanged)
 -> - REFILL: 3 months - RATIONALE: This refill should last until the patient is due for an office visit.

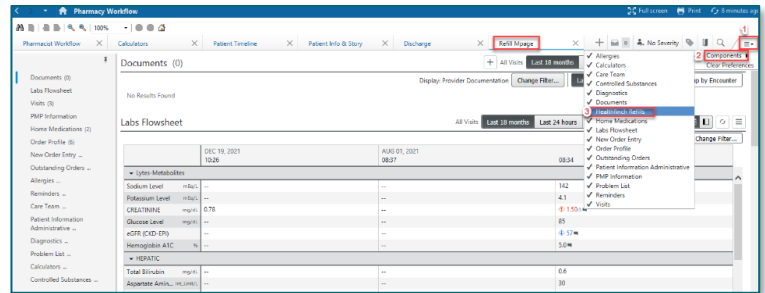
Protocol Elements

Last visit:	Kimberly Christine Benson, PA-C	01/30/2019
Next visit:		None

Powered by healthfinch, Reference: 295732359954, 11/04/2019 2:20:31 PM EST

NOTE: Healthfinch Refills will be accessible via the Refill MPage and is also available via multiple provider and clinical staff MPages.

- The **Healthfinch Refills Component** will need to be added to appropriate MPage to view. From appropriate MPage: Select the **Page** menu (hamburger icon), select **Components**, then select **Healthfinch Refills**.
- When sending a message to a provider and you want to display the Healthfinch message recommendation within a message: auto text: **/healthfinch** can be used to pull in data.



Refill Request from a Phone Note using Patient Care Protocol

The Patient Care Protocol is used for orders that are indicated within a written office protocol, specific to the practice. These orders are active upon signature; however, need to be co-signed by a provider. Refilling medications using this protocol allows the refill request to be sent to the pharmacy in a quicker manner and reduces the workload of the provider with only needing to co-sign the order.

STEP 1: Open the refill request phone message from **Message Center** (Inbox View).

STEP 2: Click **Forward** to send message back to refill pool.

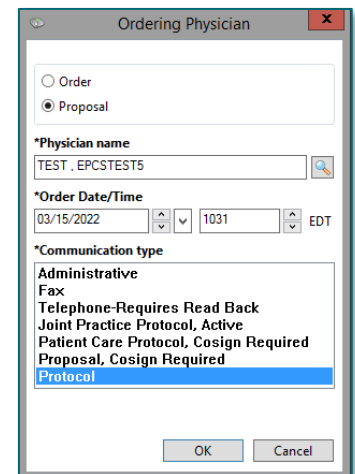
STEP 3: From within message, select **Launch Orders** and navigate to the **Medication List**.

STEP 4: Right-click the **Medication** to be refilled. Select the appropriate option **Renew, Same Supply, and Same Number** of refills.

STEP 5: **Ordering Physician** window will display. Select **Proposal**, Physician name, and communication type of Protocol. Click **Sign**.

STEP 6: Check **Delete** and **Send Message**.

STEP 7: To view Healthfinch recommendation, navigate to Summary view and MPage applicable to your practice.



NOTE: At this step, proposal is sent to Healthfinch database for recommendation. The process could take up to 4 minutes to return to message center refill pool.

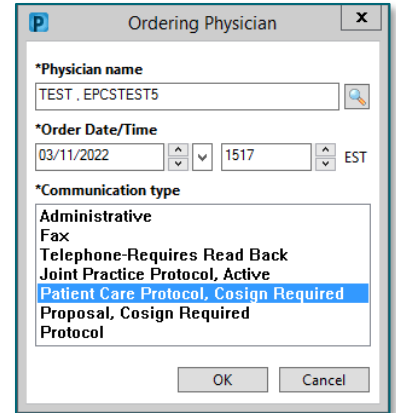
STEP 8: If refill is applicable, navigate back to **Inbox** view. Using auto text, type /Healthfinch to populate recommendations into message.

STEP 9: Click **Request** and select **green checkmark**, then click **Sign**.

STEP 10: **Ordering Physician** window will populate. Select **Physician name** and communication type **Patient Care Protocol, Cosign Required**

STEP 11: **Electronic Prescription Preview** window will populate: click **Sign**.

NOTE: Selecting **Forward** **MUST** be performed prior to adding an **Addendum** or clicking the **Launch Orders** button to generate the proposed prescription.



Proposing Refill Request to Provider from Phone Note

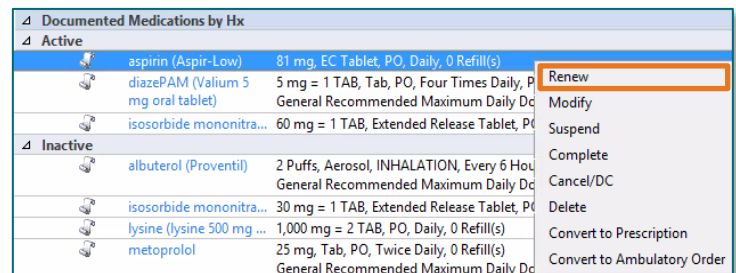
The below workflow is used for proposing prescription refills originating from a phone note created when the patient called the office.

STEP 1: Open the refill request phone message from **Message Center**.

STEP 2: Click **Forward** from the Message toolbar to launch a new message to the provider.

STEP 3: Click **Launch Orders** from within the message and generate proposed prescription renewal.

STEP 4: Right-click the medication being requested for refill and click **Renew**.



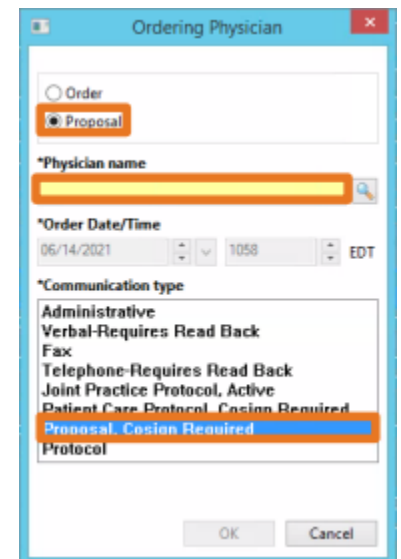
STEP 5: In the **Ordering Physician** window, select **Proposal**, enter the **Provider's Name**, and select **Proposal, Cosign Required**

STEP 6: Sign Proposal.

STEP 7: Once Healthfinch recommendation is viewed via **Summary View** on MPage, use auto text as described above within message and Save Addendum.

STEP 8: Forward to provider.

NOTE: At this step, the prescription has not routed to retail pharmacy when performing in this manner. It will route when provider signs off. This can be used for medications that do not fall under a known protocol within your practice and provider visibility and approval is needed prior to sending to retail pharmacy.



Refill and eRx Requests using Controlled Substance Workflow

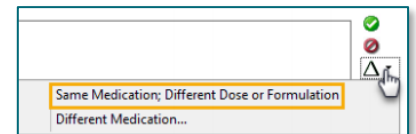
Refills involving controlled substances will follow current state by utilizing the Refill MPage. See flyer for further information. [Medication Refill Flyer](#)

eRx Renewal Process Using Patient Care Protocol

The Patient Care Protocol is used for orders that are indicated within a written office protocol, specific to the practice. These orders are active upon signature; however, need to be co-signed by a provider. Refilling medication using this protocol allows the refill request to be sent to the pharmacy in quicker manner and reduces the workload of the provider – having to simply co-sign the order.

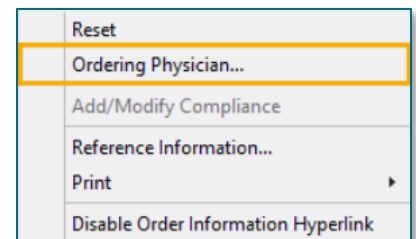
STEP 1: Renewal requests will appear in the message center with the Healthfinch recommendations. Once Healthfinch recommendation is viewed via Summary View on MPage, use auto text as described above within message and Save Addendum.

STEP 2: Click the **Modify** (white triangle) button and select **Same Medication; Different Dose or Formulation**.



STEP 3: The scratchpad will appear. Edit the details of the medication as needed. Verify all details are accurate.

STEP 4: Right-click the **Order** and select **Ordering Physician**.



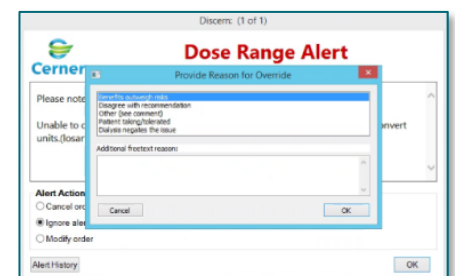
STEP 5: The Ordering Physician window appears. Verify the **Provider's name** and update as needed and select **Patient Care Protocol, Cosign Required** then click OK.

STEP 6: Click **Sign**.

NOTE: Part of the workflow, when staff select **Modify** in the eRx Renewal, the system does perform dose range checking. When the modify is selected the system checks all the parameters of the renewals – **Dose, frequency, etc.** could have changed. Some staff, especially pharmacy technicians, may need to review information with Pharmacist prior to overriding.

IMPORTANT: The Dose Range Alert may populate your screen twice. To manage this alert:

- Select Ignore Alert.
- When choosing a reason for overriding the alert, select **Patient taking/tolerated**.
- Click OK and repeat if the Dose Range Alert pops up again.



STEP 7: The **Electronic Review window** will pop up. Verify the prescription details are correct, then click **Sign** to submit.

STEP 8: The medication has been sent to the pharmacy to be filled per the patient care protocol.

- These will fall to provider's Message Center in the **Orders to Approve** section. The provider will be able to co-sign the order sent to the pharmacy.

NOTE: The **Ordering Physician window** may appear after clicking **Sign** in the **Electronic Review window**. If this window does pop-up, click **Cancel**. The order will still be sent to the provider **Order to Approve** section in **Message Center to Co-Sign**.

IMPORTANT: If a message is Forwarded to the provider this will create duplicate Message Center items. One in the **Orders to approve** (the co-sign order) and the **eRx Renewal Request** (which will have the message that the MA forwarded).

NOTE: This alert is warning the user the eRx Renewal from the Pharmacy cannot be parsed into fields. If this does occur, you will have to reject the eRx Renewal Request and refill the medication from the Medication list by going to **Launch Orders** within the Message.



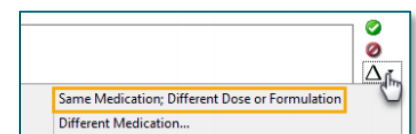
eRx Renewal Process Does NOT Meet Healthfinch Recommendations

There are instances when the patient does not meet protocol to refill a medication because they have not been seen in the recently, lab work has not been completed, etc. For this workflow, fill the request for the quantity amount and refills per location's policy and forward a message to the provider indicating that the medication was refilled and listing what is needed from the patient.

STEP 1: Renewal requests appear in a designated pool. These are opened and reviewed.

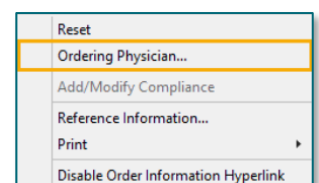
STEP 2: Research is performed in the patient's chart using the **Healthfinch Recommendations** on the **Refill MPage** in the **Summary tab** per the normal workflow. Upon review it's determined that the patient does not meet protocol to refill a medication for reasons such as: they have not been seen in the office recently, lab work has not been completed, etc.

STEP 3: Click the **Modify** (white triangle) button and select **Same Medication; Different Dose or Formulation**.



STEP 4: The scratchpad will appear. Edit the details of the medication as needed. Verify all details are accurate.

STEP 5: Right-click the **Order** and select **Ordering Physician**.



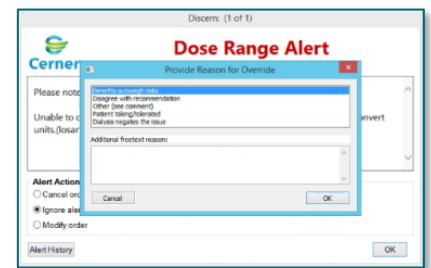
STEP 6: The **Ordering Physician window** appears. Verify the **Provider's name** and update as needed and select **Proposal, Cosign Required** then click **OK**.

STEP 7: Click **Sign**.

NOTE: Part of the workflow, when staff select **Modify** in the eRx Renewal, the system does perform dose range checking. When the modify is selected the system checks all the parameters of the renewals – Dose, frequency, etc. could have changed.

IMPORTANT: The Dose Range Alert may populate your screen twice. To manage this alert:

- Select **Ignore Alert**.
- When choosing a reason for overriding the alert, select **Patient taking/tolerated**.
- Click **OK** and repeat if the **Dose Range Alert** pops up again.



STEP 8: The **Electronic Review** window will pop up. Verify the prescription details are correct, then click **Sign** to submit.

STEP 9: The medication has been sent to the pharmacy to be filled per the patient care protocol.

- These will fall to provider's Message Center in the **Orders to Approve** section. The provider will be able to co-sign the order sent to the pharmacy.

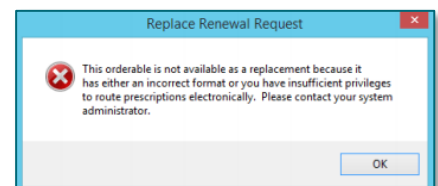
NOTE: The **Ordering Physician** window may appear after clicking **Sign** in the **Electronic Review** window. If this window does pop-up, click **Cancel**. The order will still be sent to the provider **Order to Approve** section in **Message Center to Co-Sign**.

STEP 10: After clinical staff have reviewed and modified the refill:

- Click the **Forward** button on the Message Center toolbar. Enter additional information to send to the provider that the medication was refilled using the **/healthfinch*** auto text and indicating the patient has not been seen in the office recently or needs blood work done.

IMPORTANT: If a message is Forwarded to the provider this will create duplicate Message Center items. One in the **Orders to approve** (the co-sign order) and the **eRx Renewal Request** (which will have the message that the MA forwarded).

NOTE: This alert is warning the user the eRx Renewal from the Pharmacy cannot be parsed into fields. If this does occur, you will have to reject the eRx Renewal Request and refill the medication from the Medication list by going to **Launch Orders** within the Message.



Embedded Refills Messages

The Embedded Refills message contains information in a standard concise format needed to determine if a refill applies to a particular renewal request without the need to search multiple locations within the patient charts. There are five sections within each **Embedded Refill** message.

Section 1: Medication Details

- Requested medication name, strength, and route.
- Name of the protocol which was applied—if no protocol, display will be **Unassigned**.
- Requested medication instructions (Sig).
- Last ordered information from the patient's medication list (provider, date, sig).

Section 2: Embedded Refills Recommendations

- Any warnings or manual review messages appear in red text with an X to alert staff to possible error or key decision information. These items are examples where Healthfinch doesn't have a known protocol for or a general awareness.
- If the patient meets all protocol requirements, a recommended refill duration will appear in green text based on when the patient is next due for an office visit or lab, per protocol.

Request 3 of 3
meloxicam 10 mg oral capsule
Analgesics: COX2 Inhibitors
Requested Sig: 10 mg = 1 cap, PO, Daily, # 90 cap, 0 Refill(s), other reason (Rx), Rx or Hx Med
Last ordered by Kimberly Christine Benson PA-C: 06/30/2019 QTY: 90, Refills: 0, Sig: 10 mg = 1 cap, po, daily, # 90 cap, 0 refills, other reason (rx), rx or hx med (unchanged)
X - No labs required if prescribed PRN.
ix - REFILL: 3 months (if warnings resolved) - RATIONALE: This refill should last until the patient is due for an office visit.

Protocol Elements	
Last visit:	Kimberly Christine Benson, PA-C 01/30/2019
Next visit:	None
Cr	1.2mg/dL 10/24/2019

CARE GAPS IDENTIFIED - PATIENT IS DUE FOR:
LIPID PANEL for insulin regular 100 units/mL human recombinant injectable solution
OFFICE VISIT for insulin regular 100 units/mL human recombinant injectable solution
Powered by healthfinch, Reference: 327326586127, 10/31/2019 12:50:52 PM EDT

Section 3: Protocol Elements

- Lists the last qualifying office visit and any future qualifying visits found in the patient's chart.
- Outlines the most recent results required for protocol: vitals, lab tests, procedures. If no results are found within the chart, **None** or **None Found** will display.

Request 3 of 3
meloxicam 10 mg oral capsule
Analgesics: COX2 Inhibitors
Requested Sig: 10 mg = 1 cap, PO, Daily, # 90 cap, 0 Refill(s), other reason (Rx), Rx or Hx Med
Last ordered by Kimberly Christine Benson PA-C: 06/30/2019 QTY: 90, Refills: 0, Sig: 10 mg = 1 cap, po, daily, # 90 cap, 0 refills, other reason (rx), rx or hx med (unchanged)
X - No labs required if prescribed PRN.
ix - REFILL: 3 months (if warnings resolved) - RATIONALE: This refill should last until the patient is due for an office visit.

Protocol Elements	
Last visit:	Kimberly Christine Benson, PA-C 01/30/2019
Next visit:	None
Cr	1.2mg/dL 10/24/2019

CARE GAPS IDENTIFIED - PATIENT IS DUE FOR:
LIPID PANEL for insulin regular 100 units/mL human recombinant injectable solution
OFFICE VISIT for insulin regular 100 units/mL human recombinant injectable solution
Powered by healthfinch, Reference: 327326586127, 10/31/2019 12:50:52 PM EDT

Section 4: Care Gaps

- When a medication is proposed, **Embedded Refills** evaluates protocol criteria for requested medication and looks ahead 30 days to find any upcoming/overdue requirements for any medication that is active on the patient's medication list.
- Embedded refills will suggest a BMP if protocol requires: Cr, eCFR, K, and NA.

Request 3 of 3
meloxicam 10 mg oral capsule
Analgesics: COX2 Inhibitors
Requested Sig: 10 mg = 1 cap, PO, Daily, # 90 cap, 0 Refill(s), other reason (Rx), Rx or Hx Med
Last ordered by Kimberly Christine Benson PA-C: 06/30/2019 QTY: 90, Refills: 0, Sig: 10 mg = 1 cap, po, daily, # 90 cap, 0 refill(s), other reason (rx), rx or hx med (unchanged)
X - No labs required if prescribed PRN.
-> - REFILL: 3 months (if warnings resolved) - RATIONALE: This refill should last until the patient is due for an office visit.

Protocol Elements	
Last visit:	Kimberly Christine Benson, PA-C
Next visit:	
Cr:	1.2mg/dL

CARE GAPS IDENTIFIED - PATIENT IS DUE FOR:
LIPID PANEL for insulin regular 100 units/ml, human recombinant injectable solution
OFFICE VISIT for insulin regular 100 units/ml, human recombinant injectable solution

Powered by healthfinch, Reference: 327326586127, 10/31/2019 12:50:52 PM EDT

Section 5: Reference Number

- This section is used for troubleshooting. When you or IS are encountering an issue with **Embedded Refills**, include the reference number and date/time. **Embedded Refills** can look the protocol up in their system without needing the patient's MRN or any other PHI.

Request 3 of 3
meloxicam 10 mg oral capsule
Analgesics: COX2 Inhibitors
Requested Sig: 10 mg = 1 cap, PO, Daily, # 90 cap, 0 Refill(s), other reason (Rx), Rx or Hx Med
Last ordered by Kimberly Christine Benson PA-C: 06/30/2019 QTY: 90, Refills: 0, Sig: 10 mg = 1 cap, po, daily, # 90 cap, 0 refill(s), other reason (rx), rx or hx med (unchanged)
X - No labs required if prescribed PRN.
-> - REFILL: 3 months (if warnings resolved) - RATIONALE: This refill should last until the patient is due for an office visit.

Protocol Elements	
Last visit:	Kimberly Christine Benson, PA-C
Next visit:	
Cr:	1.2mg/dL

CARE GAPS IDENTIFIED - PATIENT IS DUE FOR:
LIPID PANEL for insulin regular 100 units/ml, human recombinant injectable solution
OFFICE VISIT for insulin regular 100 units/ml, human recombinant injectable solution

Powered by healthfinch, Reference: 327326586127, 10/31/2019 12:50:52 PM EDT

Message Categories, Content, and additional messages

- This section to be used to understand what each Embedded Refills message means:

Message Category/MPage Header
In Protocol
All protocol requirements are met, request may be renewed. --> Refill X months
Out of Protocol
Protocol is not met (overdue office visits, abnormal/overdue <u>labs</u> or vital signs) X – A qualifying visit was not found within the last 2 years of the patient record. X – An office visit is overdue (performed X months ago, required every X months) X – The medication cannot be recognized so the correct protocol cannot be applied. X – A courtesy refill was already recommended on [date] X – [Lab, procedure or vitals] was not found within the lookback period X – [Lab] is overdue X – [Lab] is abnormal
Off Protocol
The requested medication does not fall under a defined protocol or cannot be addressed by the delegate (non-provider) X – Medication cannot be delegated.
Duplicate
Embedded Refills recognized that the requested medication has already been recently requested, was recently ordered, or a renewal is being requested too soon (i.e., the patient should still have medication available). X – A duplicate request was processed on [date] X – The patient is requesting refills too <u>soon</u> , the current prescription is due to run out on [date] X – The patient should have outstanding refills for this medication until [date]
Manual Review
The requested medication falls under a protocol with additional decision support (manual review message), or there are elements of the chart that Embedded Refills cannot evaluate without support from a clinician. X – Manual review message configured on protocol X – Due to unreadable sig, manually ensure the patient is due for a renewal X – This medication could not be identified X – The patient is requesting a renewal from a different pharmacy

Message Category/MPage Header
Request Discrepancy
The requested medication is on the active medication list but at a different strength/form or there are multiple orders for the same medication X – The patient is taking a different strength and form [prescribed strength and form] as of [date] X – Calculate quantity and refills manually. They could not be estimated due to missing or unreadable information X – The requested medication appears on the patient's medication history at a different strength X – The requested medication appears is active on the patient's medication history at more than one strength X – The requested medication cannot be matched or does not appear in the patient's medication history X – The requested sig has changed from the last order
Inactive Medication
The requested medication is not active on the medication list. Most common inactive statuses seen discontinued or documented X – The requested medication expired on [date] X – The requested medication was previously set to Discontinued on [date] by [provider] X – The requested medication was previously set to Documented on [date] by [provider]
Controlled Substance
The requested medication is a controlled substance under federal regulations. X – Medication cannot be delegated
Warfarin
Applies to all prescription renewal requests for warfarin.