Northern Light Health

From the Office of Clinical Informatics

Refill and eRx Workflow Ambulatory

June 23, 2021

Refill workflows will be completed by filling out a phone message in Message Center. The eRx Renewals will appear in Message Center to the Clinical Pool by the pharmacy.

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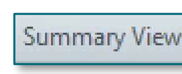
Proposing Refill Request to Provider From Phone Note

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: Review the patient's chart by clicking **Summary View** and navigate to the **Refill MPage** to utilize the components to review pertinent information, such as labs, recent office visit, etc.



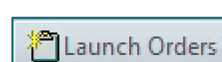
STEP 3: After completing the chart review, select **Inbox View** to go back to the phone message.

- Click **Forward** from the Message toolbar to launch a new message to the provider.
- When ordering as a proposal, the message must be sent to the provider. Enter the provider's name in both the **To:** and **Provider:** fields.

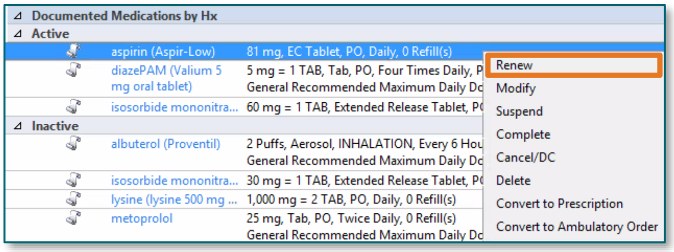
NOTE: **Selecting Forward MUST be performed prior to adding an Addendum or clicking the Launch Orders button to generate the proposed prescription.**

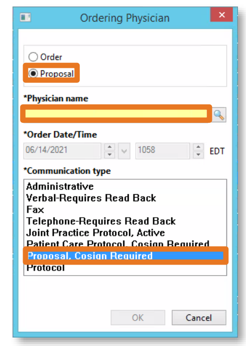
STEP 4: Enter any relevant information for the provider in the body of the message.

STEP 5: Click **Launch Orders** from within the message to generate proposed prescription renewal.



<u>STEP 6</u>: Right-click the medication being requested for refill and click **Renew**.



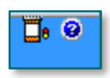


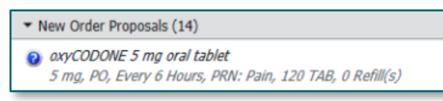
<u>STEP 7</u>: In the **Ordering Physician** window, select **Proposal**, enter the **Provider's Name**, and select **Proposal, Cosign Required** to generate the proposed prescription renewal.

<u>STEP 8</u>: After addressing all the required details and selecting the appropriate pharmacy, click **Orders for Signature**, then **Sign**.

<u>STEP 9</u>: Verify the recipient and body of the message are accurate and complete, then click **Send**.

<u>NOTE</u>: **Proposed orders will be indicated with a pill bottle and a question mark on the Medication List in the menu and in the Home Medication component on the workflow MPage, it will display as New Order proposals.**



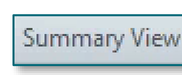


<u>Refill Request from a Phone Note using Patient Care Protocol</u>

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.

<u>STEP 1</u>: Open the refill request phone message from **Message Center**.

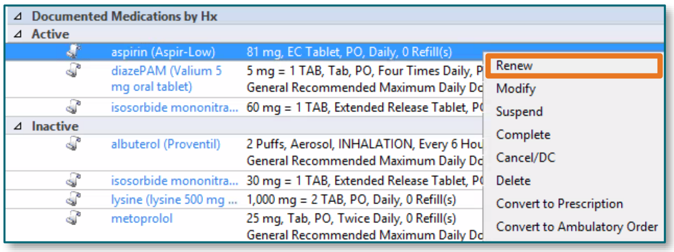
<u>STEP 2</u>: Review the patient's chart by clicking **Summary View** and navigating to the **Refill MPage** to utilize the components to review pertinent information, such as labs, recent office visit, etc.



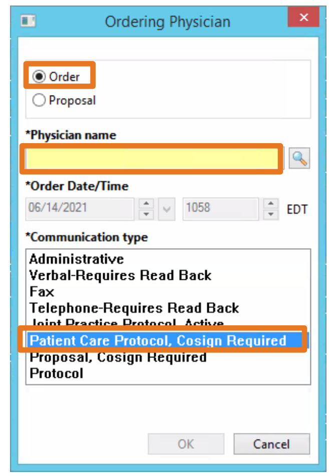
<u>STEP 3</u>: After completing the chart review, click **Inbox** View to go back to the phone message.

<u>STEP 4</u>: Click **Launch Orders** from within the message and generate proposed prescription renewal.

<u>STEP 5</u>: Right-click the medication being requested for refill and click **Renew**.



<u>STEP 6</u>: In the **Ordering Physician** window, select **Order**, enter the **Provider's Name,** and select **Patient Care Protocol, Cosign Required**.



<u>STEP 7</u>: After addressing all the required details and selecting the appropriate pharmacy, click **Orders for Signature**, then **Sign**.

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

- This message will fall to provider's Message Center in the **Orders to Approve** section and will be able to cosign the order sent to pharmacy.

<u>STEP 9</u> : After clinical staff have sent the refill:

- Staff have the opportunity to document the information needed for the refill of the prescription and use the **/med** auto-text. Click **Save** addendum, then, click **Delete**.
- If staff have additional information they want to send to the provider, they can Forward the message with the information they want to relay in the **Response** tab.

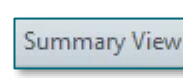
<u>NOTE</u>: **If a message is Forwarded to the provider this will create duplicate Message Center items. One in the Orders to approve (the co-sign order) and the eRx Renewal Request (which will have the message that the MA forwarded).**

<u>Refill Request using Controlled Substance Workflow</u>

This workflow is for proposing controlled substance to providers.

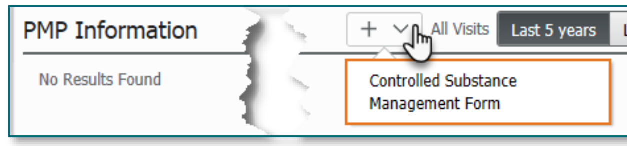
<u>STEP 1</u>: Open the refill request phone message from **Message Center.**

<u>STEP 2</u>: Review the patient's chart by clicking **Summary View** and navigating to the **Refill MPage** to utilize the components to review pertinent information, such as labs, recent office visit, etc.



<u>STEP 3</u>: On the **Refill MPage** tab click the **PMP Information** component.

- Upon reviewing the PMP information, if it is determined a PMP report needs to be run, click the **Prescription Monitoring Program** link from the toolbar. Log in and run the report.



STEP 4: From the **PMP Information** component on the **Refill MPage**, click the drop-down arrow and select the applicable controlled substance management form and document the appropriate fields in the form.

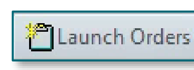
STEP 5: After completing the chart review, click **Inbox** View to go back to the phone message.

- Click **Forward** from the Message toolbar to launch a new message to the provider.
- When ordering as a proposal, the message must be sent to the provider. Enter the provider's name in both the **To:** and **Provider:** fields.

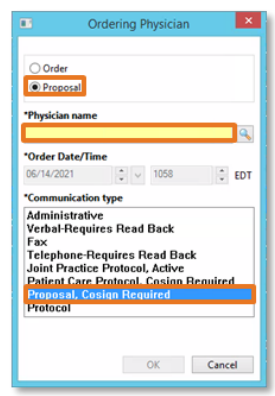
NOTE: **Selecting Forward MUST be performed prior to adding an Addendum or clicking the Launch Orders button to generate the proposed prescription.**

STEP 6: Enter any relevant information for the provider in the body of the message.

STEP 7: Click **Launch Orders** from within the message to generate proposed prescription renewal.



STEP 8: Right-click the medication being requested for refill and click **Renew**.



STEP 9: In the **Ordering Physician** window, select **Proposal**, enter the **Provider's Name**, and select **Proposal, Cosign Required** to generate the proposed prescription renewal.

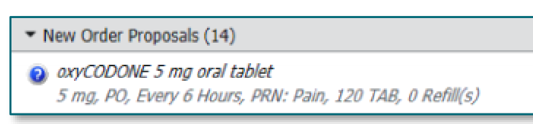
STEP 10: Fill in required details: **PMP Review Date** and **PMP Review Result as Expected.**

STEP 11: After addressing all the required details and selecting the appropriate pharmacy, click **Orders for Signature**, then **Sign**.

STEP 12: Use the applicable controlled substance auto-text to pull in the update PMP information from the Controlled Substance Management Form and any other pertinent information as needed.

STEP 13: Verify the recipient and body of the message is accurate and complete, then click **Send**.

NOTE: **Proposed orders will be indicated with a pill bottle and a question mark on the Medication List in the menu and in the Home Medication component on the workflow MPage, it will display as New Order proposals.**

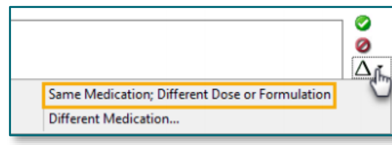


eRx Renewal Process Using Patient Care Protocol

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.

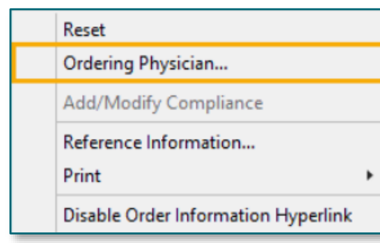
STEP 1: Renewal requests appear in a designated pool. These are opened and reviewed.

STEP 2: Research the patient's chart using the **Refill MPage** in the **Summary tab** per the normal workflow to ensure that the patient meets the protocol for a refill.



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.



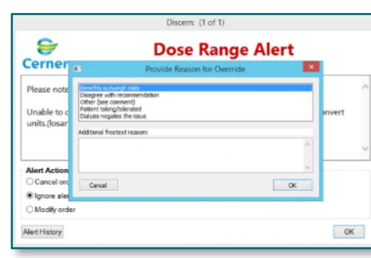
STEP 5: Right-click the Order and select **Ordering Physician**.

STEP 6: The Ordering Physician window appears. Verify the **Providers name** and update as needed and select **Patient Care Protocol, Cos-sign 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 the clinical staff have sent the refill, from the Response tab:

- Staff have the opportunity to document the information needed for the refill of the prescription and use the **/med** auto-text. Click **Save addendum**, then click **Delete**.
- If staff had additional information they wanted to send to the provider, they could then **Forward** the message with the information they wanted to relay in the **Response** tab.

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).

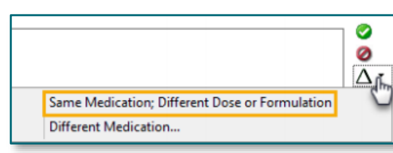
NOTE: **This alert is warning the user the eRx Renewal from the Pharmacy cannot be parsed into fields. If this does occur, you will have to reject the eRx Renewal Request and refill the medication from the Medication list by going to Launch Orders within the Message.**

eRx Renewal Process Does NOT Meet Patient Care Protocol

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.

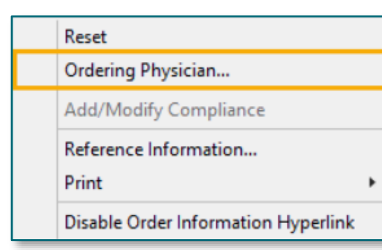
STEP 2: Research is performed in the patient's chart using the **Refill MPage** in the **Summary tab** per the normal workflow. Upon review it's determined that the patient does not meet protocol to refill a medication for reasons such as: they have not been seen in the office recently, lab work has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

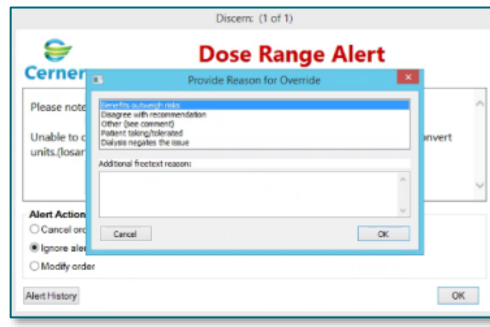


STEP 6: The Ordering Physician window appears. Verify the **Providers name** and update as needed and select **Proposal, Cosign Required** then, click **OK**.

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.

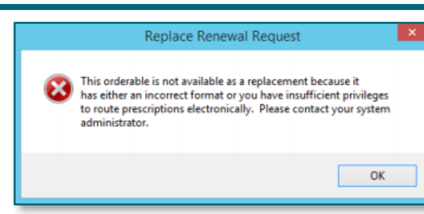
NOTE: **The Ordering Physician window may appear after clicking Sign in the Electronic Review window. If this window does pop-up, click Cancel. The order will still be sent to the provider Order to Approve section in Message Center to Co-Sign.**

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 **/med*** auto-text and indicating that 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.**



eRx Renewal Request Controlled Substance Refill Workflow

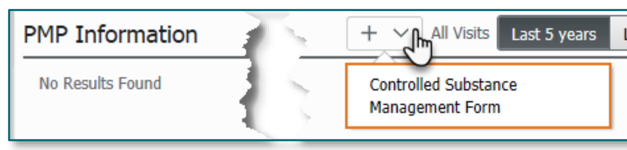
STEP 1: Open the **eRx Renewal Request**.

STEP 2: It is noted that it is a controlled substance being requested to refill.

- Reject the medication request. For the reason – choose **Other**. Enter in the free-text field indicating that **Medication is being proposed for provider review**.

STEP 3: Research is performed in the patient's chart using the **Refill MPage** in the **Summary tab** per the normal workflow.

- On the **Refill MPage**, click the **PMP Information** component.
- Upon reviewing the PMP information, if it is determined a PMP report needs to be run, click the **Prescription Monitoring Program** link from the toolbar. Log in and run the report.



STEP 4: From the **PMP Information** component on the **Refill MPage**, click the drop-down arrow and select the applicable controlled substance management form and document the appropriate fields in the form.

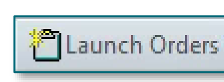
STEP 5: After completing the chart review, click **Inbox** View to go back to the message.

- Click **Forward** from the Message Center toolbar to launch a new message to the provider.

- When ordering as a proposal, the message must be sent to the provider. Enter the provider's name in both the **To:** and **Provider:** fields.

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

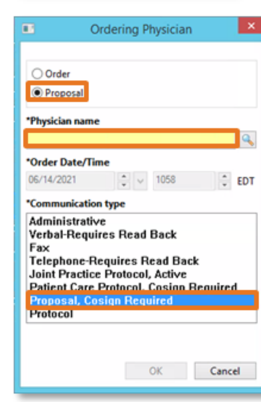
STEP 6: Enter any relevant information for the provider in the body of the message.



STEP 7: Click **Launch Orders** from within the message to generate proposed prescription renewal.

STEP 8: Right-click the medication being requested for refill and click **Renew**.

STEP 9: In the **Ordering Physician** window, select **Proposal**, enter the **Provider's Name**, and select **Proposal, Cosign Required** to generate the proposed prescription renewal.



STEP 10: Fill in the required details: **PMP Review Date** and **PMP Review Result as Expected.**

STEP 11: After addressing all the required details and verifying the appropriate pharmacy, click **Orders for Signature**, then **Sign**.

STEP 12: Use the applicable controlled substance auto-text to pull in the update PMP information from the Controlled Substance Management Form and any other pertinent information as needed.

STEP 13: Verify the recipient and body of the message is accurate and complete, then click **Send**.

Patient Match

Prescriptions that are not an exact match will display in Message Center as **eRx Non-Matches or eRx Suspect Matches**. Complete the following steps to manage eRx Non-Match or eRx Suspect Matches Renewal Messages:

STEP 1: Double-click the **eRx Non-Match** or **eRx Suspect Matches** renewal request message to open item.

STEP 2: When the **Patient Match** dialog box opens, note the pharmacy demographic section. This section contains the patient information sent by the pharmacy.

STEP 3: If there are patients in the system with demographics similar to those sent by the pharmacy, they are displayed in **Other Possible Matches** section.

- The weight column indicates how likely the patient is to match the patient sent from the pharmacy.

STEP 4: After verifying all the appropriate patient demographic details are consistent, **select the appropriate patient from the middle pane** or click **Search** to launch a patient search.

STEP 5: You will be prompted to select an encounter from the patient match dialog box for the renewal order and associated message. Choose the latest encounter from your practice.

NOTE: The system requires electronic prescription orders originate from the practice at which the Ordering Provider is employed. Please make sure the encounter matches with the correct practice.

STEP 6: After selecting the appropriate encounter, click **OK**.