From the Office of Health Informatics

Quick Reference Guide (QRG)
Document Home Medications

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This Quick Reference Guide (QRG) demonstrates the workflow for documenting Home Medications.

Common Buttons & Icons

Patient Pharmacy	Patient Pharmacy toolbar icon
	Pill Bottle icon
	Paper Scroll icon
	Scratch pad dropdown arrow
	Missing Details icon
	Add icon
	Refresh icon

Document a Patient Preferred Pharmacy

- **From the Handoff Workflow MPage within the patient's chart:**

STEP 1: Click **Patient Pharmacy** from the toolbar.

STEP 2: Enter any information needed to help filter results; then click **Search**.

NOTE: **If a patient has no preferred pharmacy, the Preferred Pharmacy window will default to the Search tab.**

STEP 3: Right-click the appropriate pharmacy.

STEP 4: Click **Add Patient Preferred.**

NOTE: **A patient can have up to five preferred pharmacies.**

STEP 5: Click the **Patient Preferred** tab to review that the pharmacy was added.

STEP 6: Hover over the pharmacy name to gather additional location and contact details.

STEP 7: Set a default preferred pharmacy by right-clicking the selected pharmacy; then click **Set as Default**. The default pharmacy will be listed in bold text.

STEP 8: Click **OK**.

Remove a Patient Preferred Pharmacy

- **From the Handoff Workflow MPage within the patient's chart:**

STEP 1: Click **Patient Pharmacy** from the toolbar.

STEP 2: Click the **Patient Preferred** tab.

STEP 3: Right-click the pharmacy to be removed.

STEP 4: Click **Remove**.

STEP 5: Click **OK**.

Document No Preferred Pharmacy

- **From the Handoff Workflow MPage within the patient's chart:**

STEP 1: Click **Patient Pharmacy** from the toolbar.

STEP 2: Select the **No Preferred Pharmacy** checkbox.

NOTE: **Only prescriptions within the United States can be submitted electronically. Out of the country pharmacies will not populate in a pharmacy search, there are also pharmacies not in the system. Document No Preferred Pharmacy in these situations.**

STEP 3: Click the **Reason** dropdown arrow; click the appropriate Reason.

STEP 4: Click **OK.**

Document Home Medication

- **From the Handoff workflow MPage within the patient's chart:**

STEP 1: Click **Home Medications** in the workflow menu.

STEP 2: Click the blue **Meds History** hyperlink.

STEP 3: Review patient medication.

NOTE: **The Pill Bottle icon indicates a Northern Light Health provider prescribed medication. The Paper Scroll icon indicates that the medication was added to the list by clinical staff at a Northern Light Health location.**

STEP 4: Modify medication details using the right-click menu. Right-click the medication; then click **Modify**.

NOTE: **Select multiple medications at once and modify details one time for all selected medications. Click the first medication then hold down the CTRL key and select the additional medications needed.**

STEP 5: Click the fields that need modification. Preset options display. Click the option needed.

NOTE: **If what is needed is not listed, type the first two or three letters, and a list will populate. Click the appropriate selection.**

STEP 6: Click the medication scratch pad dropdown arrow to close the scratch pad.

STEP 7: Click **Document History** once completed.

STEP 8: Back on the Handoff MPage, click the **Refresh** icon.

Modify Compliance

- **From the medication list in the patient's chart:**

STEP 1: Right-click the medication.

NOTE: **Select multiple medications at once and modify details one time for all selected medications. Click the first medication then hold down the CTRL key and select the additional medications needed.**

STEP 2: Click **Add/Modify Compliance**.

STEP 3: Click the **Status** dropdown arrow.

STEP 4: Click the appropriate status.

STEP 5: Input additional Compliance information as needed.

STEP 6: Click **Document History** once completed.

STEP 7: Back on the Handoff MPage, click the **Refresh** icon.

Add a New Medication (including Herbal Supplements)

- **From the medication list in the patient's chart:**

STEP 1: Click the **Add** icon.

STEP 2: Type the name of the medication or supplement in the Search field.

NOTE: **Search folders can also be used. Click the folder matching the first letter of a frequently used medication.**

STEP 3: Click the name of the medication needed from the populated list.

STEP 4: Click **Done**.

STEP 5: Click **Document History** once completed.

STEP 6: Back on the Handoff MPage, click the **Refresh** icon.

Adding a New Medication with Missing Information

- **From the medication list in the patient's chart:**

STEP 1: Click the **Add** icon.

STEP 2: Type free text; then click **Free Text Item Name**.

STEP 3: Click the appropriate order sentence; then click **OK**.

STEP 4: Click **Done**.

STEP 5: Click the available fields and dropdown arrows to add any available information for the free text item in the free text Details scratch pad. Best practice is only to enter whatever information the patient can remember with certainty.

STEP 6: Document special instructions as needed.

NOTE: **Best practice is to note in the Special Instructions field when and if the patient will get the additional information for documentation.**

STEP 7: Click **Document History** once completed.

STEP 8: Back on the Handoff MPage, click the **Refresh** icon.

Document External Rx History

- **From the Handoff MPage Workflow page with the patient's chart:**

STEP 1: Click **Home Medications** from the Handoff workflow.

STEP 2: Click the blue **Meds History** hyperlink.

STEP 3: Click the **External Rx History** dropdown arrow.

STEP 4: Click **Import.**

NOTE: **An Rx History Patient Consent window will populate if permission was not already given. If the office consent forms were signed, then consent has been given. Click Consent Granted as appropriate.**

STEP 5: Click the **Display** dropdown arrow to set how much information is visible.

STEP 6: Click the wanted timeframe.

NOTE: **Twelve months is the default timeframe.**

STEP 7: Click the **Pill Bottle** icon for medications that need to be converted to a prescription.

STEP 8: Click the **Paper Scroll** icon for medications that need to be documented as a home medication.

STEP 9: Document Order Sentences as needed.

STEP 10: Click and drag up the scratch pad with a selected medication as needed to document medication details.

STEP 11: Click the appropriate fields and tabs to document details as appropriate.

NOTE: **Best practice is to complete Rx compliance when reviewing medications with the patient.**

STEP 12: Scroll left to view medication details.

STEP 13: Click **Document History**.