

**e-MDs Solution Series™**

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# **Formulary Benefits User Guide**

**Version 8.0**

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# 1

## Introduction

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The Formulary Benefits add-on function is available as an extra cost option for use with e-MDs Solution Series. With these functions, Solution Series users can:

- Determine the pharmacy benefits and drug copays for a patient's health plan.
- Check whether a prescribed medication is covered (in formulary) under a patient's plan.
- Display therapeutic alternatives with preference rank (if available) within a drug class for non-formulary medications.
- Determine if a patient's health plan allows electronic prescribing to Mail Order pharmacies, and if so, e-prescribe to these pharmacies.
- Download a historic list of all medications prescribed for a patient by any provider (if that medication was submitted for payment as part of any health insurance plan.)

The Formulary Benefits function allows users to determine the formulary coverage (i.e.: whether the patient's insurance plan provides reimbursement for a specific dispensable medication) prior to prescribing. Other pharmacy-related information, such as medication copay amounts, the need for prior authorization, quantity limits, and coverage restrictions by age or gender may also be available.

Further, when a prescribed medication is flagged as not in formulary, the function can display a list of therapeutic alternative choices that are covered. This allows clinicians the option to prescribe "in plan" medications (if appropriate) for their patients.

This guide provides instructions for using this function with the Solution Series modules.

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## Using This Guide

As you go through this guide, you will notice that each set of steps to perform a task begins with an indented heading starting with "To" and ending with a colon (:). That heading is then followed by indented steps to be performed in a prescribed sequence. For example, after a brief overview of when you may want to select an electronically enabled mail order pharmacy, the procedure looks like the contents of the following box:

**To select an electronically enabled mail order pharmacy:**

1. Click the **Search** icon located in the **Pharmacy** column to display the Find Pharmacy window.
2. Click only the check box **Electronically Enabled Mail Order**, then click the **Search** icon.
3. Highlight the desired pharmacy and click the **Select** icon.

**Note:** In this example, we streamlined the steps by removing sample screens. For more details on this procedure, see that section of this guide.

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## Related Documentation

Documentation for Solution Series modules is provided in PDF (Portable Document Format) files for viewing and printing individually, and in Help format for easy access from each product module. Both formats and access methods provide the same information. The documentation library is updated extensively for each major product release as well as updated and corrected periodically, as needed. For the latest version of any Solution Series documentation, go to the documentation section of the [e-MDs Support](#) site at **Online Support > Downloads > Documentation**.

The following documents are available to all Solution Series users:

- *e-MDs Solution Series Administration Guide* is your starting point for initializing and customizing Solution Series modules for use in your organization. This guide provides step-by-step instructions for licensing your software, adding system users and defining access levels, adding and modifying user groups, and setting up default handling of various module tasks.
- *e-MDs Solution Series Bill User Guide* provides instructions for working with insurance codes and electronic claims, setting fee schedules and rules, defining policies, posting and billing transactions and reversals, and performing numerous other practice management tasks.
- *e-MDs Solution Series Chart User Guide* leads you from the beginning of an office visit through the visit conclusion when billing is enabled. Using Chart you can track and code a patient's medical information and provide prenatal, maternity and postnatal care. This guide also details Chart's prescription processing, lab interfaces, and telephone interactions with patients.
- *e-MDs Solution Series Installation and Upgrade Guide* leads you through the preparation of your site for Solution Series, the database and application installation steps, and post-installation configuration. If Solution Series is already installed at your facility, use the update instructions provided in this guide to update your system.
- *e-MDs Solution Series Schedule User Guide* leads you through scheduling and tracking appointments, setting up and modifying patient accounts, blocking time on the calendar to restrict appointment scheduling, checking patients into the facility and tracking their progress through each encounter with a provider, and checking eligibility.
- *e-MDs Solution Series Reports User Guide* lists the reports available through Solution Series. A description of each report is provided, along with the location of the report within Solution Series

modules, the available fields and filters used to select specific data for the report, and samples of most reports, illustrating what you can expect when running a report at your facility.

- e-MDs Solution Series Utilities Guide covers tools and utilities that may be used with various Solution Series modules. This includes using: DocMan to graph lab results, process incoming faxes, and generate and send documents to patients and external resources such as specialist referrals and labs.
  - **TaskMan** to automatically send messages, implement secure e-mail, and track tasks to be performed within Solution Series.
  - **Snapshot/Digicam** to capture images of patients/staff and add them to patient and user records.
  - **Forms/Letter Builder** to generate, print and send forms and letters from within Solution Series. This includes the use of Microsoft Word and the e-MDs database to create customized/merged letters and documents.
  - **Registry Processor** to create, view, distribute and print customized reports based on patient demographics and healthcare records.

Additional documentation is also available on the e-MDs Support site for performing specific tasks and for using e-MDs interface products for working with labs and other organizations. See the [e-MDs Support](#) site for access to the latest versions of these documents.

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## Getting Additional Help and Information

e-MDs realizes that one of the most important elements of any software system is the support services backing it up. There are a number of support resources available to help you optimize the use of your system and participate in the e-MDs community.

### Help Screens

Help is accessible on each Solution Series application and module by going to **Help > Search Topic** on each application's top toolbar. Related help files, such as this guide, the Utilities Guide, and the Reports User Guide are generally accessible from the same help screen. After opening each help file, you can use the table of contents, index or search function to locate the specific information you need.

Online Help files are also available through the application toolbar for Portal applications by clicking the question mark. The following Help is available for the Portal application:

- *e-MDs Patient Portal: The Clinic's Guide to Using the Portal* provides instructions for maintaining user access on a Patient Portal, working with patient appointments scheduled through the Portal, communicating with patients through a Portal e-mail interface, processing prescription refill requests, and auditing Patient Portal usage.
- *e-MDs Patient Portal: The Patient's Guide to Using the Portal* instructs patients on the use of the Patient Portal to communicate with their healthcare provider, view their own healthcare information, and submit requests for appointments and prescription refills. This HTML file is provided on your Patient Portal for easy online viewing or printing by patients.

### User Guides

The e-MDs Solution Series user guides contain comprehensive information about all standard product functions. This includes dealing with many of the complex situations that can arise in a medical office. Use the table of contents, index or search option to locate items of particular interest. These guides are very similar to the application help screens. See "[Related Documentation](#)" for a brief description of the Solution Series user guides available.

Solution Series guides are always available in electronic format (Adobe .pdf files). You can put copies on each computer in the network. You can download the Adobe Acrobat Reader for free from [www.adobe.com](http://www.adobe.com). Updated user guides are included on the CD-ROMs you will receive with each upgrade, as well as on the support pages at [www.e-mds.com](http://www.e-mds.com).

To download files from the e-MDs Support site, you will need your clinic password. Instructions on how to apply for a password are on the Web site. Only one password is issued per customer account, so please ensure you communicate this to your staff.

## Using the e-MDs Support Center

The e-MDs Support Center is an online customer meeting place for clients with an active account. It is accessed from the Support pages at [www.e-MDs.com](http://www.e-MDs.com) or <http://supportcenteronline.com/ics/support/default.asp?deptID=3222>. If you don't have an account, you can request one by using the Request New Account button on the login page. We strongly encourage each staff member in a clinic to have their own logins instead of one generic one for all people. The primary reason for this is that when we need to push information such as update notifications it is sent to everyone meaning there is a smaller chance that the information will not be disseminated such as if someone is sick or ignores the message.

Support Center includes the following tools that can be of great assistance to helping your practice work more efficiently with the e-MDs Software:

- **Forums/NewsGroups:** The online forums are an e-MDs User Community where you can post messages related to support, general discussions, suggestions, tips and more. It is a great non-urgent support tool and is also searchable. You can subscribe to various forums that interest you and get an e-mail notification if someone posts to them. You can also elect to get an e-mail if someone posts to a specific message. This is really useful if you post a question and want to know when it is answered. Support forums are monitored by the e-MDs support team and a number of our customers also chip in with their knowledge.
- **Downloads:** Downloads include shared templates for Chart, Word Forms, reports, updates to content such as ICD and CPT codes, bug patches, etc.
- **Knowledge Base:** The knowledge base includes an extensive list of articles that you can use for troubleshooting, setup and so on. These are generally posted based on questions from customers.
- **Troubleshooter:** This search utility makes it easy to quickly locate the information you're looking for. It cross-references multiple parts of the support center and returns hyperlinks to articles, downloads and the like.
- **Surveys:** Occasionally e-MDs will gauge your opinions about something via surveys which can be distributed via Support Center.
- **"Push" e-mails:** If we want to let you know about something, we can push information to you from Support Center.





# 2

## Formulary Benefits

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Formulary Benefits data are maintained for health insurance providers by organizations known as Pharmacy Benefits Managers (PBM). PBMs are third-party administrators of prescription drug programs whose primary responsibilities are processing and paying prescription drug claims. They also develop and maintain formularies, which are lists of dispensable drugs covered by a particular drug benefit plan.

Solution Series obtains its PBM Formulary Benefits data from **RxHub**.

*Continued on the next page ...*

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## Downloading Formulary Benefit Data

Benefit data must first be downloaded from RxHub before it can be used in Solution Series.

There are two types of Formulary Benefit downloads. One download (called a “batch” download) runs at night and downloads pharmacy benefit information for all patients holding appointments for the next day in the Scheduling module. The other download is performed as needed to obtain benefit information for a particular patient who was not included in the previous night’s batch download.

### Setting Up a Batch Download (Schedule or Bill Applications)

Batch-based checking is done using the **Report Manager** application which is accessed under the **Reports** menu in either the **Schedule** or **Bill** modules. If your clinic is not currently using **Report Manager** to automate the generation of reports tasked to specific users, you will need to set the Batch download as a **Windows Scheduled Task**. The task type in Report Manager is “RxHub Eligibility Check.”

Here is some further information about this task:

- This task does not have any parameters.
- Ensure that it is set up to run daily using the EOD option.
- A path is not needed since this job simply sends ANSI X.12 270 files over web services.
- You must set up designated users under the Task Info tab. The user(s) will be messaged in TaskMan if there is a problem with a patient’s eligibility check. If there is, it is an ANSI X.12 standard for the information source (RxHub in this case) to respond with one of 3 file types: a 997, a TA1, or a 271 response that includes an AAA segment. The actual message that the user will see is built by parsing out elements of the response.
- When the task is run, it will generate check files for patients with appointments scheduled for the 24 hour period from the task run time.

### Setting Up Report Manager Tasks

Report Manager is a module that can be run automatically using the Windows Scheduled Tasks program. You can also open the module and run the jobs manually if you want. It’s a timesaver regardless, because you have to set parameters each time. You can also refer to this section for defining the default network folder path in which reports are saved if they have a specific path identified in the specific job setup.

To send a task based on a Report Manager job, you need to fill out the Task Info tab.

#### To set up a Report Manager task:

1. Open Bill or Schedule.
2. Go to **Reports > Report Manager**.
3. Click **New**.
4. In the Select Report Module window, **Billing** is selected.
5. Click **RxHub Eligibility Check** and click **Select**.
6. In the New Rule window, on the **Job** tab, **Rule Active** is selected.
7. For **Parameters**: This job does not have any parameters.
8. Ensure that it is set up to run daily using the **EOD** option.

9. File Path (optional): A path is not needed since this job simply sends ANSI X.12 270 files over web services.
  10. Click the **Task Info** tab.
  11. Check **Generate Task**.
  12. Enter a **Task Name**. This is what the task recipients will see as the task subject.
  13. Enter the **Attachment Description**.
  14. You must designate users by clicking the **Add/Modify** button. The user(s) will be messaged in TaskMan if there is a problem with a patient's eligibility check. If there is, it is an ANSI X.12 standard for the information source (RxHub in this case) to respond with one of 3 file types: a 997, a TA1, or a 271 response that includes an AAA segment. The actual message that the user will see is built by parsing out elements of the response.
- Note:** When the task is run, it will generate check files for patients with appointments scheduled for the 24-hour period from the task run time.
15. Click **Save**.

## To Run RxHub Eligibility Check Automatically

Report Manager has a "silent mode" that allows the program to run automatically through the Microsoft Window's Scheduler. This silent mode allows the program to run on at a scheduled interval without user intervention. For Report Manager to run in silent mode, setup information must be input in both Report Manager and in the Windows Scheduler. This setup needs to be done on one computer on the network; setting the silent mode on more than one computer can cause the program to fail to run.

### To set up the Windows Scheduler:

1. Open the scheduler by going to Start > Programs > Accessories > System Tools > Scheduled Tasks.
2. In the Scheduled Tasks window, click the **Add Scheduled Task** button. This will open a Scheduled Task Wizard.
3. Click **Next** in the first window.
4. In the second window, browse to the folder where Report Manager is stored and select it (by default, the program is stored in Program Files\e-MDs\SolutionSeries\Apps\).
5. Select the Report Manager file and click **Next**.
6. In the next screen, type in a name for the task to be scheduled (the task name can be the same as the program name), and select how often the task should be run. It is highly suggested that these rules be run daily.
8. Click **Next**.
9. In the next screen, select the start time and the frequency with which the task should be run (for example: Everyday, Weekdays, or Every x days) and the date the task should start running. Keep in mind that in clinics with a large patient population, the rules may take as long as 2 to 3 hours to run.

Because of the amount of "processing time" that the rules demand from the computer, it is best to schedule these tasks to be run at night or during other off hours. Since these times are also when most businesses run their database backups and because the backups also require a lot of processing time, it is necessary to separate the scheduled times of these tasks. For example if a typical database backup starts at 10pm and takes about 2 hours, it would be necessary to either start the rule task after midnight or sometime well before 10PM, depending on the amount of time the rules take to run.

- Enter a username and password on the next screen when prompted. The task will run as if it were started by that user. This username and password is the same one that would be used to log into the Windows network, not one that is used to log into e-MDs Solution Series.
- Click **Finish** at the next screen.

There is one more thing to be done before the setup is complete.

- In the Scheduled Task window there will now be an icon representing the task that was just created. Double-click this icon to open the Properties window of the scheduled task.
- In the Properties window there will be a field labeled **Run:** with the path to the Report Manager file and another field below it labeled **Start in:** that also shows the path but without the executable listed. The following is an example of what the two fields *might* look like (depending on your setup):

Run: "C:\Program Files\e-MDs\Solution Series\Apps\emdsReportManager.exe" /s

Start in: "C:\Program Files\e-MDs\Solution Series\Apps"

**Important!** For the Rule Manager to run in silent mode, a space, forward slash, and the letter "s" (/s) must be added to the end of the Run: path. This needs to be added OUTSIDE of the quotation marks. The following is an example of what the complete path should look like (depending on your setup):

Run: "C:\Program Files\e-MDs\Solution Series\Apps\emdsReportManager.exe" /s

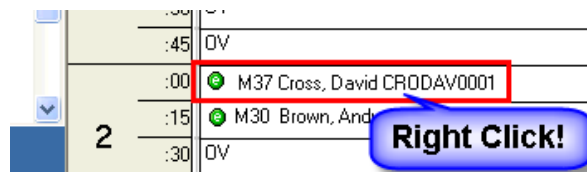
Once the /s is added, the properties window can be closed and the Scheduler will run the rules automatically according to the time and frequency that were set up. This properties window can also be used to change the time and frequency of the scheduled task at a later date if necessary.

## Download for Individual Patient (Schedule Application)

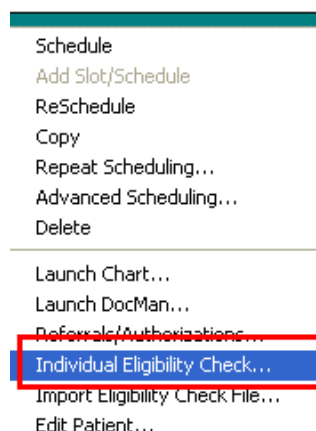
Users can also download formulary eligibility information for individual patients (example: a walk-in patient) in the Schedule application when needed.

### To download an individual patient from the Schedule application:

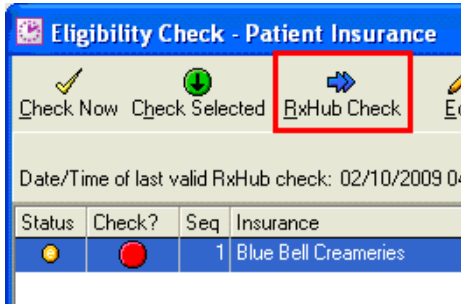
- Right-click** the patient's name in the schedule.




- Select (click) **Individual Eligibility Check...** from the menu options displayed.

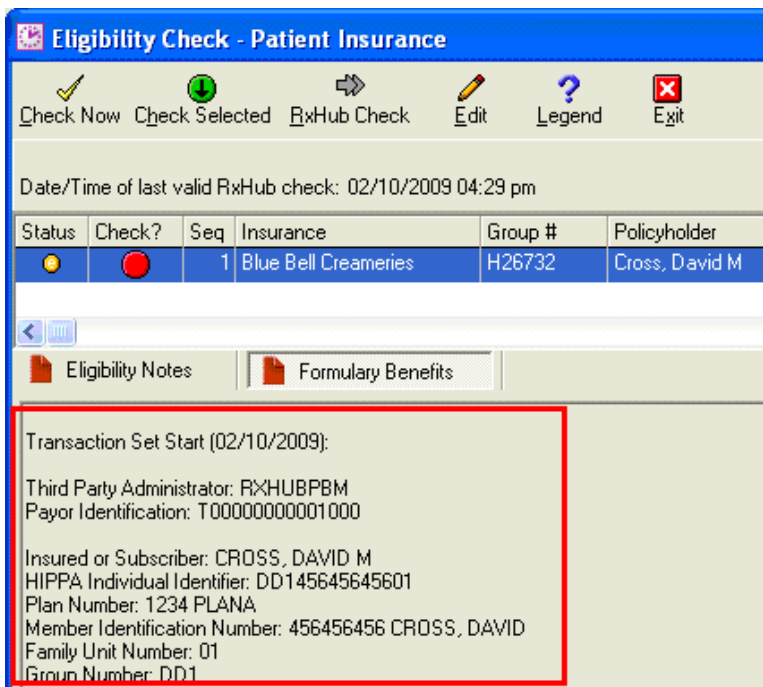


3. Click the **RxHub Check** icon on the toolbar to download the Pharmacy Benefits Data for that patient.



If a patient has Formulary benefits, benefit information displays in the lower pane of the Eligibility Check window.


**Note:** The RxHub Check icon will now be inactive (“grayed” out) . When inactive, this indicates that current information (i.e.: less than 24 hours old) have already been downloaded for this patient.

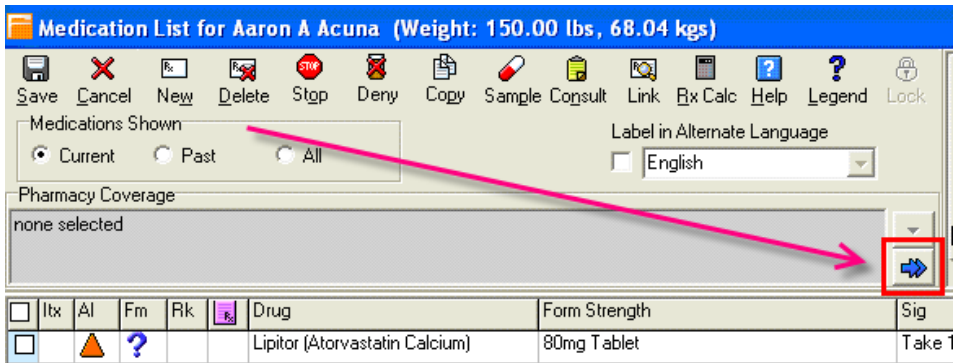


## Download for Individual Patient (Chart Application)

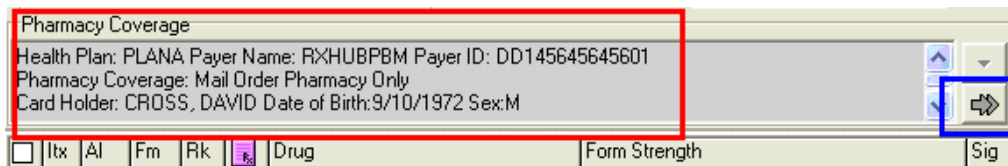
Individual Formulary benefits information can also be downloaded from the ScriptWriter application in Chart.

**To download an individual patient from the ScriptWriter application in Chart:**

1. Open the Medication List for the patient ( go to **Visit/HS > Medications > Refill Prescriptions**) and click the **RxHub Check** icon .



This downloads formulary benefit data for that patient and displays it in the **Pharmacy Coverage** Pane.



Again note that the **RxHub Check** icon is no longer active (“grayed” out) once the information has been downloaded indicating that the system now has current data for this patient.

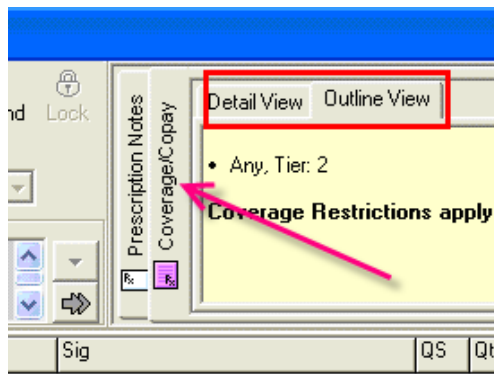
**Important!** Solutions Series uses only “current” download data (i.e.: less than 24 hours old) for Formulary Benefits. Older download data (i.e.: greater than 24 hours old) are discarded by the system and users must run another download to access current data.


## The Coverage/Copay Pane

Once a patient’s current formulary information has been downloaded, users can access available Coverage and Copay information for each drug on the Medication List. This information displays in the same pane (location) as the Prescriptions Notes (upper right corner of the Medication List).

### To check coverage and copay for a specific drug:

1. Select (click) the medication from the Medication List, then click the **Coverage/Copay** tab.



**Alternate Method:** Click the coverage/copay icon  on the same line as the medication in the grid).

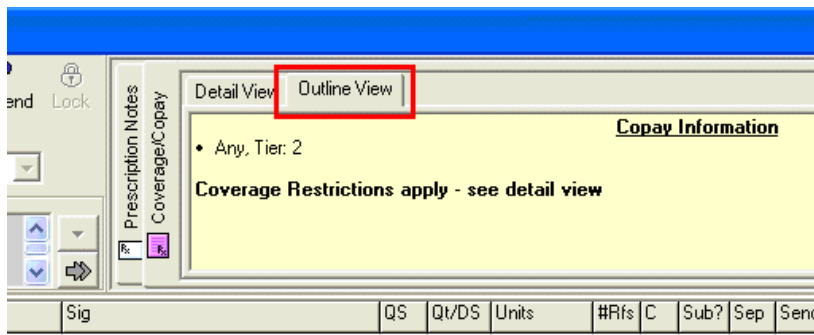
Pharmacy Coverage: Mail Order Pharmacy Only  
Card Holder: CROSS, DAVID Date of Birth:9/10/1972 Sex:M

<input type="checkbox"/>	Itx	AI	Fm	Rk		Drug
<input type="checkbox"/>						Lisinopril
<input type="checkbox"/>						Propranolol HCl
<input type="checkbox"/>						Actigall (Ursodiol)

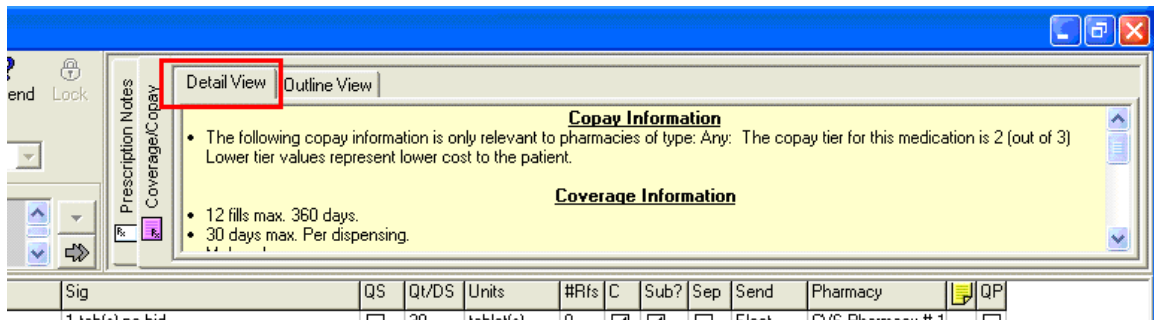
After flashing briefly with a red background, the information displays over a yellow background in place of the Prescription Notes. After a short interval, the system automatically redisplay the Prescription notes.

- Click the **Coverage/Copay** tab or grid icon again to redisplay that the benefit information..

Note that the Coverage/Copay pane provides two views of this data – **Outline** and **Detail**. The **Outline View** tab shows a summary of coverage information.



- Click the **Detail View** tab for view more specific information concerning the patient's coverage.



**Important!** Not all PBMs collect and maintain the same information. As a result, some patient formulary benefit downloads may not the same information provided in a different patient's download.

## Selecting In-Formulary Medications

Several columns in the grid section of the **Medication List** window relate to coverage information concerning a specific medication.

Card Holder: CROSS, DAVID Date of Birth:9/10/1

<input type="checkbox"/>	Itx	AI	Fm	Rk		Drug
<input type="checkbox"/>						Lisinopril
<input type="checkbox"/>						Propranolol HCl
<input type="checkbox"/>						Actigall (Ursodiol)

These are:

- Fm:** The **Formulary Status** column. Icons appearing in this column indicate whether the drug listed on that line is in formulary. The icons and their meanings are as follows:
  - Approved** Medication is included in Formulary (covered) for this patient.
  - Preferred** Medication is included in Formulary and a preferred medication.
  - Non-Formulary Medication** Drug is non-formulary and is normally not covered by the plan.
  - Non Reimbursable** Medication is non formulary and is never covered by the plan.
  - Formulary Value Unknown** Formulary status is unknown/has not been retrieved.
- Rk:** The **Formulary Preference Level** column. For medications substituted for non-formulary medication, a number (if relevant) indicates the preference level of the selected medication according to the formulary plan. Alternatives are ranked from 1 to 99 with higher values indicating a greater preference.
- Coverage or CoPay Information Available** Indicates that there is additional Formulary Coverage and/or copay information available for this medication. Click the icon appearing next to the medication in the grid to display coverage information for that drug.

## Selecting a Therapeutic Alternative Drug

The following example is used to explain how to select a Therapeutic Alternative medication in place of a non-Formulary one.

### To select a therapeutic alternative drug:

- The provider is prescribing Zestril (Lisinopril) for this patient.

id Holder: PALTRUW, BRUCE Date of Birth: 2/1/1945 Sex: M

<input type="checkbox"/>	Itx	AI	Fm	Rk		Drug	Form Strength	Sig
<input type="checkbox"/>						Synthroid (Levothyroxine Sodium)	0.125mg Tablet	Take 1 tablet(s)
<input type="checkbox"/>						Atorvastatin Calcium	40mg Tablet	Take 1 tablet(s)
<input type="checkbox"/>						Lipitor (Atorvastatin Calcium)	20mg Tablet	Take 1 tablet(s)
<input type="checkbox"/>						Propranolol HCl	40mg Tablet	Take 1 tablet(s)
<input type="checkbox"/>						Warfarin Sodium	2mg Tablet	1 tab(s) po eve
<input checked="" type="checkbox"/>						Zestril (Lisinopril)	10mg Tablet	

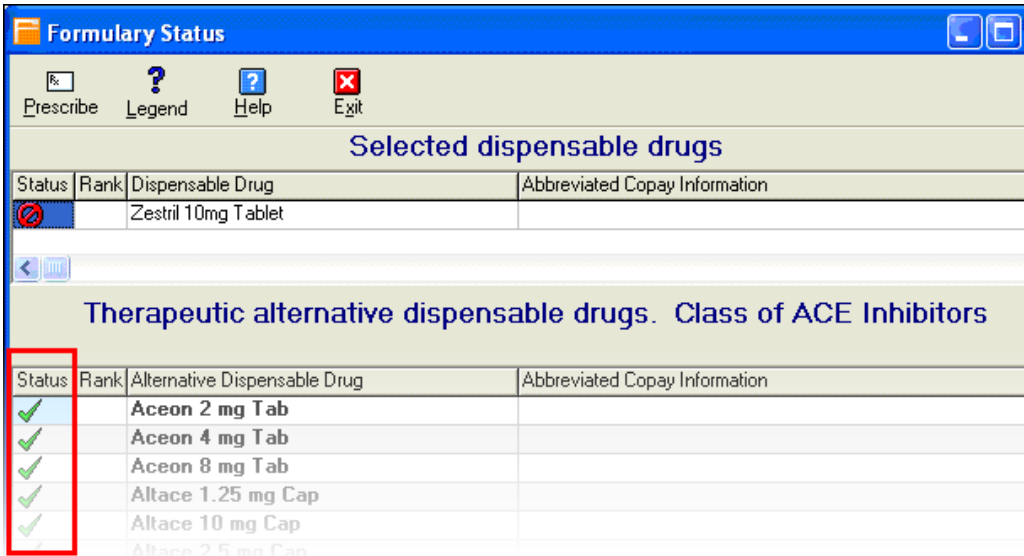
**Note:** If Zestril is non-formulary (the **Non Formulary Medication** Icon displays in the **Fm** column).

id Holder: PALTRUW, BRUCE Date of Birth: 2/1/1945 Sex: M

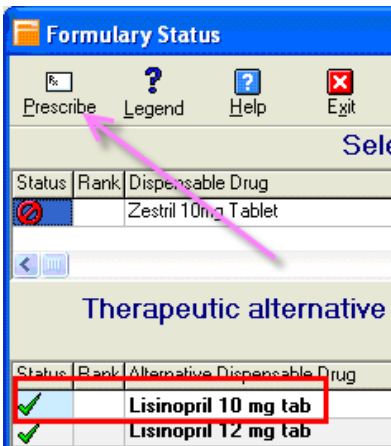
<input type="checkbox"/>	Itx	AI	Fm	Rk		Drug	Form Strength	Sig
<input type="checkbox"/>						Synthroid (Levothyroxine Sodium)	0.125mg Tablet	Take 1 tablet(s)
<input type="checkbox"/>						Atorvastatin Calcium	40mg Tablet	Take 1 tablet(s)
<input type="checkbox"/>						Lipitor (Atorvastatin Calcium)	20mg Tablet	Take 1 tablet(s)
<input type="checkbox"/>						Propranolol HCl	40mg Tablet	Take 1 tablet(s)
<input type="checkbox"/>						Warfarin Sodium	2mg Tablet	1 tab(s) po eve
<input checked="" type="checkbox"/>						Zestril (Lisinopril)	10mg Tablet	



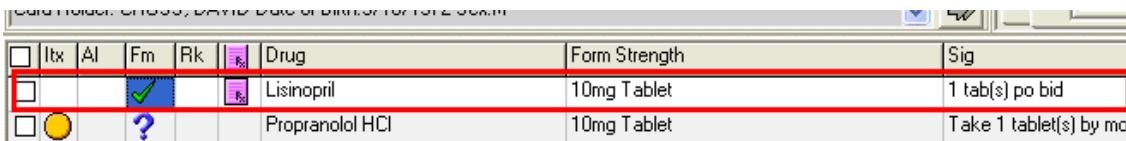
- The provider **double-clicks** the **Non-Formulary Medication** icon to view and select from a list of therapeutic alternatives for Zestril. This displays in the **Formulary Status** window.



- Therapeutic alternatives of the same drug class are displayed. Note that the **Formulary Status** for each alternative (**Status** column) is also listed.



- The provider reviews the list, selects (clicks) the drug **Lisinopril 10 mg** as an alternative, then clicks **Prescribe**.

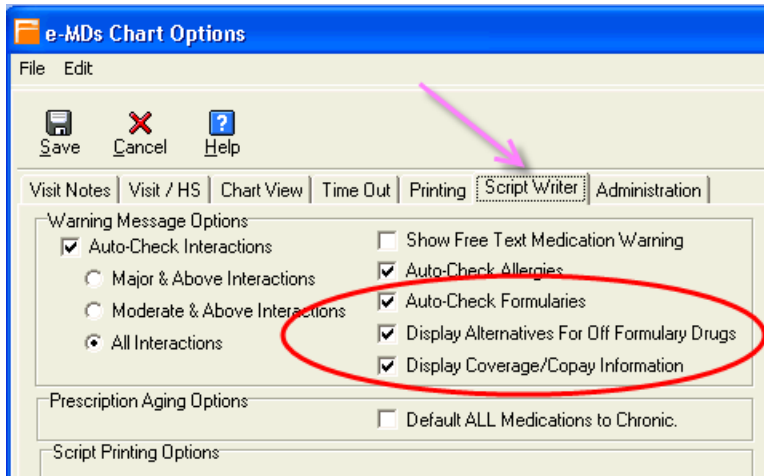


Lisinopril now appears in the Medication list. Note that this selection is In Formulary according to the icon in the **Fm** column.

## Setting Formulary Benefits Options

Users have several options for setting up how Formulary Benefits functions behave in ScriptWriter.

These options are found under the **ScriptWriter** tab of the **e-MDs Chart Options** window (**File > Options...**).



The available options are:


- Auto-Check Formularies.
- Display Alternatives for Off Formulary Drugs.
- Display Coverage/Copay Information.

## Auto Check Formularies

When this option is selected, a formulary status icon (Approved, Non Formulary Medication, Preferred, etc.) automatically displays in the **Fm** column with each medication.

Pharmacy Coverage: Mail Order P1  
Card Holder: CROSS, DAVID Date

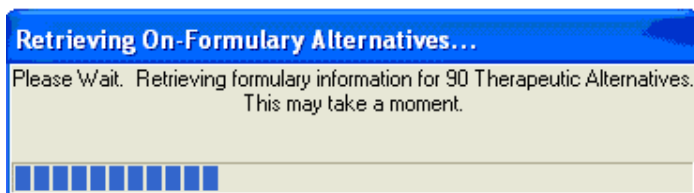
<input type="checkbox"/>	Itx	Al	Fm	Rk	<input type="checkbox"/>	Dr
<input checked="" type="checkbox"/>			✓		<input type="checkbox"/>	Lisi
<input checked="" type="checkbox"/>	●		★	1	<input type="checkbox"/>	Prc
<input checked="" type="checkbox"/>	●		⊘		<input type="checkbox"/>	Act
<input checked="" type="checkbox"/>	●		✓		<input type="checkbox"/>	Ad

If this option is **not** selected, the **Formulary Value Unknown** icon  displays in the **Fm** column for each medication. To check if the medication is in formulary, the user must click the icon to display its formulary status.

<input type="checkbox"/>	Itx	Al	Fm	Rk	<input type="checkbox"/>	Dr
<input type="checkbox"/>		▲	?		<input type="checkbox"/>	Lip

## Display Alternatives for Non-Formulary Drugs



When this option is selected and the user selected a non-formulary drug from the Choose Medication window,



the system automatically displays a message that it is retrieving therapeutic alternatives...:




...and opens the **Formulary Status** window allowing the user to select an in formulary drug.

If the **Display Alternatives for Formulary Drugs** option is **not** selected, the user must click a non-formulary  or Non-reimbursable  icon to view alternatives.

## Display Coverage/Copay Information

When the **Coverage/Copay** option is selected and the user has downloaded benefit information for that patient, the system acts as follows:

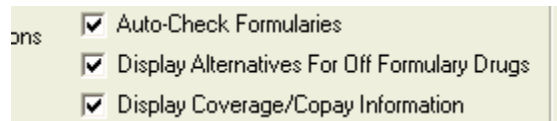
When a user clicks on a drug (that includes a form strength) in the Medication List grid, the coverage/copay information displays automatically for several seconds in the upper right corner of the window.

If the **Coverage/Copay** option is **not** selected, the Medication List window does not display coverage/copay information whenever a medication is clicked in the grid. To view this information, the user must either click the Coverage Copay tab after clicking the medication or click the Coverage/Copay icon  next to the medication to display the information.

## Considerations for Setting Formulary Options

Formulary Benefits options were designed to allow the user to fully automate the formulary checking process or perform some or all checking and selection tasks only as needed.

### Setting for Full Automatic Checking





For full automatic checking, select all the options. With this configuration, all medications (that have a form strength selected) will be checked for formulary status as they are entered. If a medication is non-formulary, the system automatically opens the **Formulary Status** window allowing the user to select a therapeutic alternative. Also, Coverage/Copay information displays automatically on the Medication List whenever a drug on the grid is selected (clicked).

Full automatic checking is convenient; however, it can slow the prescribing process by requiring the user to wait while the system retrieves information for each medication.

## Setting for Partial Automatic Checking

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- Auto-Check Formularies
- Display Alternatives For Off Formulary Drugs
- Display Coverage/Copay Information

By selecting **Auto Check Formularies** option and **not** selecting **Display Alternatives for Off Formulary Drugs**, the system displays the Formulary Status icon for each drug on the Medication List window but the user must click any non-formulary  or non-reimbursable  icons to view and select a therapeutic alternative.

## Setting for Full Manual Checking

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- Auto-Check Formularies
- Display Alternatives For Off Formulary Drugs
- Display Coverage/Copay Information

If the user selects neither option, she or he must click the Formulary Value Unknown icon  in the **Fm** column of the Medication List to perform Formulary Checking. If the check returns the either the non-formulary  or non-reimbursable  icon, the user must click that icon to display therapeutic alternatives.

# 3

## Medication History

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Another function available as part of the Formulary Benefits add-on is the ability to download a comprehensive list of all medications prescribed for a patient. This list includes medications prescribed by any physician and filled at any pharmacy provided the prescription was submitted to one of the Pharmacy Benefit Manager (PBM) organizations for payment.

With this function, physicians can verify what another doctor has prescribed for a patient and help avoid possible duplicate prescribing. The list also helps clinicians identify medications prescribed by others that a patient may fail to mention as part of their medication history or for which they cannot provide adequate information (drug name, form strength, etc.).

*Continued on the next page ...*

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## Maintaining Information Security

Before accessing a patient's medication history for the first time, a user must document in Solution Series that the patient (or guardian) has given permission for the clinic to download this information. Once permission is documented in the system, clinicians are not prompted again to document this information unless the patient has changed the level of permission granted or revoked it altogether. A change in permission level or status is performed from the patient's demographic record.

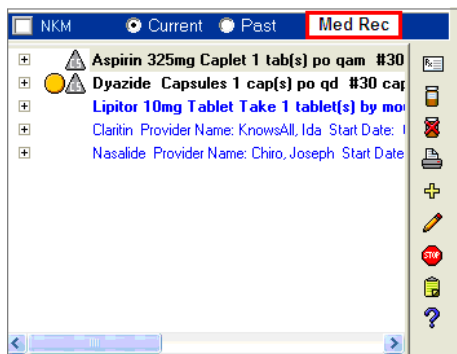
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## Downloading a Patient's Medication History

A patient's current and past medications can be viewed from Chart's Visit/HS view.

### To view a patient's medication history:

1. In the patient's chart, click the **Visit/HS** tab to show the Health Summary.
2. Click the plus sign (+) before the blue Current Medications label to expand the patient's medication list.
3. Click the Med Rec button to open the Medication Reconciliation window.



4. The Medication Reconciliation window opens, displaying the patient's current medications in the screen's left panel.
5. Go to **File > Import from Medication History** to open the RxHub window. If this is the first time the medication history has been accessed for this patient, the Consent Selection Form box opens.

You can document Consent, Restricted Consent, or Consent denial here. Note that Restricted Consent will only display the medications prescribed by the current provider.

6. Select the appropriate consent provided by the patient or guardian, then click the **OK** button.

**ConsentSelectionForm**

Please choose the level of consent given for downloading this patient's medication history.

Consent given by:

- Patient
- Parent or Guardian

RESTRICTED consent (only prescriptions written by the current provider) given by:

- Patient
- Parent or Guardian

No Consent Given:

- Patient DENIES Consent

Cancel OK

The Medication History From RxHub window displays the patient's medication list. Medications are listed by **Last Fill Date** with the most recent date appearing at the top.

**Medication History From RxHub**

Prescription history for BRUCE PALTROW.

OXYCODONE W/APAP 5/325 TAB	Dispensed 60 Days Supply 15	Last Fill 2009-03-03
Pharmacy: WALGREENS #00000 1 CENTRAL STREET INDIANAPOLIS, IN Phone (800)555-1212		
Prescriber: Dr. JOHN SMITH MERCY CLINIC ST. PAUL, MN		
HUMULIN 70/30 VIAL	Dispensed 10 Days Supply 30	Last Fill 2009-03-02
Pharmacy: WALGREENS #00000 1 CENTRAL STREET INDIANAPOLIS, IN Phone (800)555-1212		
Prescriber: Dr. JOHN SMITH MERCY CLINIC ST. PAUL, MN		
OXYCODONE W/APAP 5/325 TAB	Dispensed 60 Days Supply 15	Last Fill 2009-03-01
Pharmacy: WALGREENS #00000 1 CENTRAL STREET INDIANAPOLIS, IN Phone (800)555-1212		
Prescriber: Dr. JOHN SMITH MERCY CLINIC ST. PAUL, MN		
CITALOPRAM HBR 20 MG TABLET	Dispensed 30 Days Supply 30	Last Fill 2009-02-28
Pharmacy: WALGREENS #00000 1 CENTRAL STREET INDIANAPOLIS, IN Phone (800)555-1212		
Prescriber: Dr. JOHN SMITH MERCY CLINIC ST. PAUL, MN		
TRAZODONE 100 MG TABLET	Dispensed 60 Days Supply 30	Last Fill 2009-02-27
Pharmacy: WALGREENS #00000 1 CENTRAL STREET INDIANAPOLIS, IN Phone (800)555-1212		
Prescriber: Dr. JOHN SMITH MERCY CLINIC ST. PAUL, MN		
ACETAMINOPHEN/COD #3 TABLET	Dispensed 40 Days Supply 7	Last Fill 2009-02-26
Pharmacy: WALGREENS #00000 1 CENTRAL STREET INDIANAPOLIS, IN Phone (800)555-1212		
Prescriber: Dr. JOHN SMITH MERCY CLINIC ST. PAUL, MN		
METHOCARBAMOL 500 MG TABLET	Dispensed 70 Days Supply 17	Last Fill 2009-02-25
Pharmacy: WALGREENS #00000 1 CENTRAL STREET INDIANAPOLIS, IN Phone (800)555-1212		
Prescriber: Dr. JOHN SMITH MERCY CLINIC ST. PAUL, MN		
EQULIC ACID 1 MG TABLET	Dispensed 30 Days Supply 30	Last Fill 2009-02-24

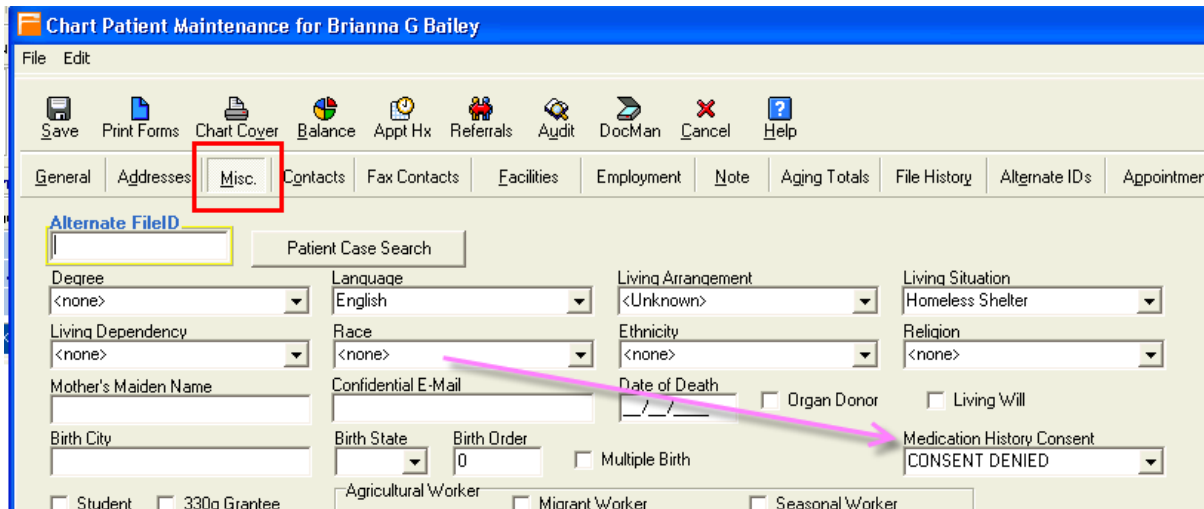
Certain information may not be available or accurate in this report, including items that the patient asked not be disclosed due to patient privacy concerns, over-the-counter medications, low cost prescriptions, prescriptions paid for by the patient or non-participating sources, or errors in insurance claims information. The provider should independently verify medication history with the patient.

OK

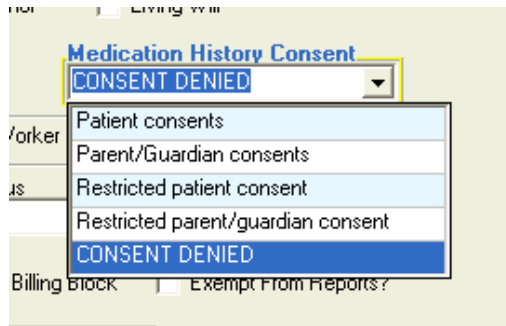
7. To close the window, click the **OK** button.

## Setting or Updating Patient Consent

Medication History patient consent is stored in the patient demographic record under the **Misc** tab. All patients are initially set to the status **CONSENT DENIED** until it is changed in the demographic record or by completing the **Consent Selection** Form which displays the first time a user tries to access a patient's medication history.



To alter the Medication History Consent status, access the patient's demographic record and change the **Medication History Consent** field.



The choices are:

- Patient consents
- Parent/Guardian consents
- Restricted patient consent (displays current provider prescription history only)
- Restricted parent/guardian consent (current provider only)
- CONSENT DENIED

**Note:** If a patient or parent/guardian initially denies consent and this was documented using the Consent Selection Form window, the user must change the consent using the Medication Consent Field in the Patient Demographic record to change the status before accessing the medication history.



# 4

## Mail Order e-Prescribing

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Another feature of the Formulary Benefits functionality allows users to send prescriptions electronically to mail-order pharmacies if allowed by the patient's formulary plan. This operation is similar to SureScripts e-prescribing to retail pharmacies.

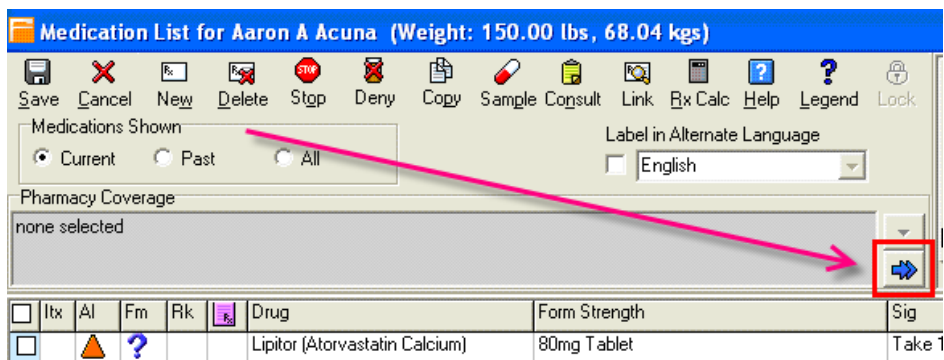
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# System Overview

When prescribing for a patient whose pharmacy benefits information has been downloaded, the system checks whether mail order e-prescribing is allowed. If so, Mail Order pharmacies that have been entered into Solutions Series are made available for e-prescribing. If the patient's coverage does not include this form of prescribing, or there is no benefit information available for the patient, e-prescribing to any listed Mail Order pharmacy is blocked.

## To e-prescribe to a mail-order pharmacy:

1. Check that current Formulary Benefits data has been downloaded for this patient. Do this by looking at the RxHub Check icon on the Medication List window for patient. If the icon is active , click the icon to download current (i.e.: less than 24 hours old) benefits information. If the icon is inactive ("grayed" out ) , current benefits data is already available.



2. Select **Electronic** as the **Send** method for the medication.



3. In the **Pharmacy** column, click the down arrow to display pharmacies. Note that if the patient's benefits does not include Mail Order e-prescribing, the system will not allow selection of a Mail Order pharmacy from this drop-down list.


DS	Units	#Rfs	C	Sub?	Sep	Send	Pharmacy	
	tablet(s)	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Print		
	tablet(s)	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Print		
	capsule(s)	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Fax	CVS Pharmacy #	
	tablet(s)	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Electro	CVS Pharm	
	tablet(s)	*Test Pharmacy:						
	tablet(s)	CVS Pharmacy # 1475: 10233 OLD GEORGETOWN						
	tablet(s)	PBMA Mail Order Pharmacy: 6 Drug Drive						
	days	PBMB Mail Order Service: 2356 Krebs Cycle Drive						
	tablet(s)	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Phone	*Test Pharmacy: T	

# Searching for Electronically Enabled Mail Order Pharmacies

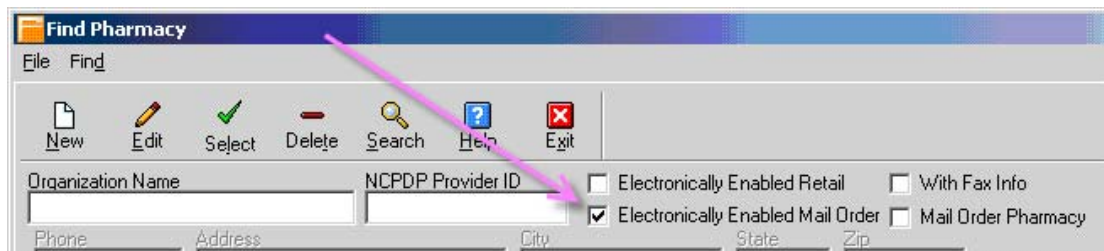
The **Find Pharmacy** search window includes search options to display only Electronically Enabled Mail Order Pharmacies.

**To select an electronically enabled mail order pharmacy:**

1. Click the **Search** icon located in the **Pharmacy** column to display the Find Pharmacy window.

	QS	Qt/DS	Units	#Rfs	C	Sub?	Sep	Send	Pharmacy
ne with	<input type="checkbox"/>	30	tablet(s)	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Print	
	<input type="checkbox"/>	60	tablet(s)	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Print	
	<input type="checkbox"/>	60	capsule(s)	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Fax	CVS Pharmacy #
	<input checked="" type="checkbox"/>	30	tablet(s)	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Electr	CVS Pharmacy 
	<input type="checkbox"/>	30	tablet(s)	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Print	
	<input type="checkbox"/>	60	tablet(s)	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Print	

2. Click only the check box **Electronically Enabled Mail Order**, then click the **Search** icon.



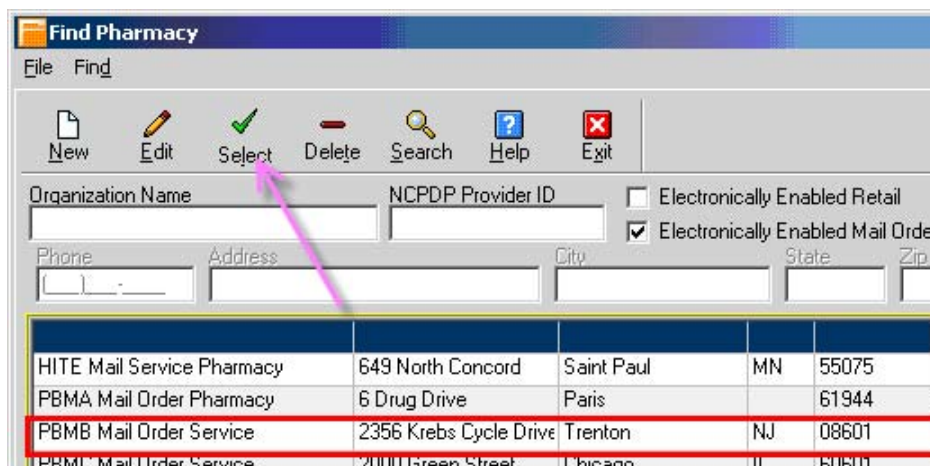
**Find Pharmacy**  
File Find

New Edit Select Delete Search Help Exit

Organization Name: \_\_\_\_\_ NCPDP Provider ID: \_\_\_\_\_  
 Electronically Enabled Retail  With Fax Info  
 Electronically Enabled Mail Order  Mail Order Pharmacy

Phone: \_\_\_\_\_ Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

3. Highlight the desired pharmacy and click the **Select** icon.



**Find Pharmacy**  
File Find

New Edit Select Delete Search Help Exit

Organization Name: \_\_\_\_\_ NCPDP Provider ID: \_\_\_\_\_  
 Electronically Enabled Retail  
 Electronically Enabled Mail Order

Phone: \_\_\_\_\_ Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

HITE Mail Service Pharmacy	649 North Concord	Saint Paul	MN	55075
PBMA Mail Order Pharmacy	6 Drug Drive	Paris		61944
<b>PBMB Mail Order Service</b>	<b>2356 Krebs Cycle Drive</b>	<b>Trenton</b>	<b>NJ</b>	<b>08601</b>
PRML Mail Order Service	21111 Green Street	Chicago	IL	60611