Creating a Patient Record

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• Prior to adding a patient to the system a patient search must be performed in order to make sure the patient does not already exist

1. From the Workbench, press or click the Patient button.
The Patient Search window is divided into two parts: the search criteria at the top and the search results display at the bottom.
• In the Search pane, there are three available function buttons for searching: Extended, Search, and Clear.
• In the Results pane, there are four function buttons for Search results: New, Copy, OK, and Cancel.
• The Clear button is used to remove information from either pane.

2. Type the patient’s name.
   • Patient searches can be performed using the last name, first name, address, phone number, city or postal code.

3. Press or click the Search button.
   • Patients matching your search criteria will be shown and Records Found will display.
   • Check the list to make sure the patient you wish to create doesn’t already exist.
     • When Records Found displays the OK button is enabled.
     • If the Patient Search shows the required patient press or click to highlight and then press or click the OK button to open that patient folder.

4. Press or click the New button.
5. Type all **personal information** related to the customer

- Include the patient’s:
  - Last and first name
  - Birth Date
  - Gender
  - Personal Health Number (PHN) – health card number
  - Address
  - Phone number as well as cell (mobile) and fax numbers
  - Email address
  - City, province, postal code

- City and province will default to your geographical location based on your Pharmacy preference settings
- Enter Birth Date as mm/dd/yyyy (Depending on windows setting)
- Enter Phone, Mobile and Fax number with no spaces or characters

  - **Use the Tab key to move between fields**
  - **Use the Business and Other tabs to enter additional patient information such as alternative address and contact information**
  - **Use the Accounts tab to enter credit card or Discount card numbers**
  - **As soon as the New patient folder appears, the arrow moves to the Patient button**

6. Press or click the **Save** button.

- A folder has now been created for this patient and the patient’s personal information has been saved
• After creating the patient, you may be required to add a third party plan
• A Cash (CA) plan is automatically added when a new patient is created

7. Press or click the 3rd Party tab.
8. Press or click the Add button.

9. Type a Bill Code or a Third Party Name.
   • Use the % (percentage) symbol to perform a wildcard search; using this symbol in any search field will find and display all records
10. Press or click the Search button.
    • You will see Records Found displayed and the Third Party name appear
    • If more than one record appears, press or click to highlight the third party record you wish to use
11. Press or click the OK function button.
12. Type in all required **Third Party Detail** information.
   - If you have more than one plan to add, enter all information for all plans, then press or click the save button before continuing

13. Press or click the **Help** button to view the details of what **Third Party Details** are required for the selected Third Party.

14. Press or click the **Save** button.

   *The Scan Card function button allows you to scan in a patient’s third party card and attach it to each third party plan*

   - In our example for third party provider Manitoba Health (DP), requires Carrier ID and Group ID, this auto populates based on plan selected
   - PHN is required (located in the main tab of the patient folder)
   - Client ID is greyed
The Patient Folder: Creating a New Patient Record – Adding Allergies and Medical Conditions

• After creating the patient you may be required to add allergies or medical conditions
• When interaction checking is done on the patient’s medications, these conditions are checked

15. Press or click the Clinical tab.
16. Press or click the Add button.

If a patient has no known allergies or conditions, use the No Known Medical Allergies and No Known Medical Conditions checkboxes

17. Type the name of the patient’s allergy or medical condition in the Description field. (Optional)
   • By selecting the Type of allergy, you can narrow your search to allergies within a particular group
   • By selecting Allergy Groups in the drop-down list, the system filters for Penicillin groups, so that when filling a prescription, an Alert would display if you were trying to dispense anything in that family (e.g., Amoxicillin)

18. Press or click the Search button.
19. Press or click to highlight the allergy or medical condition from the list.
20. Press or click the OK button.
The Patient Folder: Creating a New Patient Record – Adding Allergies and Medical Conditions (cont’d)

- The Details window automatically appears allowing for further documentation with regards to the condition selected (optional)
- This condition can be linked to a specific drug and or Notes maybe attached

21. Select or type all required data in fields.

22. Press or click the OK button.
   • note: when entering data the OK will be evoked
   OR
   Press or click the Cancel button

23. Press or click the Save button.
   • When filling a prescription for a Diabetic Therapy, PharmaClick Rx checks to verify the patient has “Diabetes Mellitus” medical condition recorded
   • If no, then one will be added
The Consult tab tracks consultation and intervention sessions between pharmacist and patient
• In the Patient Consent information box, you can select all permissions that the patient has provided (third party adjudication, information collection, prescription release), indicate the approval date, and select the PharmaClik user who entered the information; you can also add comments, if necessary

24. Press or click the Consult tab

25. Press or click the Add button
The Patient Folder: *The History Tab*

- The History tab records and displays all actions performed for this patient and for all of the patient’s prescriptions.
- If you are using the IVR service, the types of calls made and the purpose for them will be listed here.

26. Press or click the **History** tab.
The Patient Folder: Creating a New Patient Record – The Consult Tab (cont’d)

- On the Consultation/Intervention Form window, you can add details of the consultation or intervention (the length and type of service performed, the drugs involved, and a follow-up session, if required)
- Any follow-up sessions scheduled here will appear in the Activities folder on the Workbench

27. Press or click the Add button to add **Drugs Involved**.
   - Search for and select any drugs that were dispensed/not dispensed as a result of the consultation/intervention

28. Press or click the Add button type of **Services**.
   - Search for and select any services that were provided during the consultation/intervention

29. Type any **Notes** applicable to the consultation.

30. Press or click the **OK** button.
   - A consultation line appears identifying the type of service documented
The Patient Folder: Creating a New Patient Record – The Notes Tab

- The Notes tab allows you to record messages and supplemental information about the patient
- These notes can be printed on the label set, display in the Alert box, or flagged as Private so that the patient doesn’t see it

31. Press or click the Add button.
   - Type the note; this text box allows freeform text
   - Write concise and clear comments that will be easily understood by other pharmacy staff and/or the patient
   - Use the Alert, Print, and Private checkboxes to include/exclude the Notes from printing and/or displaying
   - Use the Delete button to permanently remove the Note from the patient’s folder

32. Press or click the Save button.
Now that you have created a patient in PharmaClik Rx, it is important to review what is contained in the other tabs located in the Patient folder.

These tabs will be referred to in greater detail throughout the PharmaClik Rx Fundamentals Learner’s Guide.

3rd Party tab
- This is where all third party billing information is stored.

Clinical tab
- This is where information such as allergies, blood pressure and general medical conditions are stored.

Profile tab
- This allows you to view the patient’s prescription and non-prescription medications.

History tab
- This tracks each activity that is performed on the patient record.

Consult tab
- This tracks any consultations and/or interventions and dialogue with the patient (this includes patient consent information).

Preferences Tab
- This contains any preferences set for an individual patient.

Paper Clip Tab
- This is where scanned or attached documents are stored.

Notes Tab
- This is where you can add and/or modify patient-specific notes.
- These notes will be attached to the patient and will appear in the Alerts section when filling prescriptions for the patient.
The Patient Folder: The Preferences Tab — @ A GLANCE

- Preferences specific to the patient are stored here, including: doctor, prescription dispensing, labelling, and Reminder preferences
- You can override any or all of these settings when filling a prescription for this patient

**Primary Information/Default Doctor** information box
- Use the Add function button to associate a doctor to a patient
- You can add primary and secondary doctors
- Once added, when filling new prescriptions, the (primary) doctor name automatically appears in the Doctor field
- The Remove function button allows you to remove the doctor

**General** information box
- When the option is selected (checked), the preference is set for this patient’s prescriptions (e.g., Dosett or Blister packaging)

**Label** information box
- Change the language setting for this patient so that vial labels and/or leaflets are printed in a language other than the default language (English)
- When the Snap Caps option is selected (checked), this will remind users to give the patient non-safety caps

**Prescription** information box
- Flag this patient for prescription delivery, set up Reminder preferences
- Special Auth(orized) DINs with associated expiry dates/quantities are automatically populated and can also be manually added
The Attachments tab stores scanned documents and images specific to this patient; the attachments can be viewed at any time.

You can also attach documents saved on the computer.

**Paperclip icon**
- The paperclip icon displays to indicate an attachment; you can press or click the paperclip to view the attachment.

**Attachment Description**
- You can select the type of attachment from the list to identify and label the attachment.

**Private checkbox**
- Use the Private checkbox; it works the same as it does throughout PharmaClik Rx.
- Selecting the checkbox means that the attachment will be hidden when you are in Patient Mode.

**Function buttons**
- Use these function buttons to scan (and control the image), add and remove files, print attachments, and to sort the order in which the attachments display.