

New Brunswick Drug Information System (DIS) User Guide



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Revision History

In order to maintain the accuracy of this document, any changes made will be noted in the table below. Please refer to this section before using this document to ensure no updates were made to the content you may be referencing.

Date	Revision
July 15, 2016	Updated Help Desk Support section
July 21, 2016	Added Correcting Overlays (Synchronizing the Wrong Patient) section
October 27, 2016	Addition of PharmaClik Rx 1.8 NAPRA Security Changes
June 21, 2021	Added Unit of Measure Requirement section
October 23, 2023	Updated Mixture Folder section

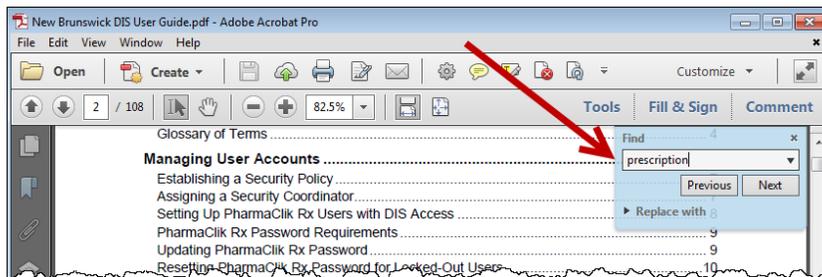
How to Use this User Guide

To navigate this user guide quickly, use the Table of Contents to find your topic or search this User Guide using a key word. You can use the following two features:

- **Find Feature** – Searches the PDF for your key word and displays one result at a time in sequential order.
- **Advanced Search Feature** – Searches the PDF for your key word and displays all the pages that contain that key word on the left side. You can click on any page from the panel and it will display the content on the side.

To Use the Find Feature:

1. Select **Edit > Find**. The “Find” window appears.

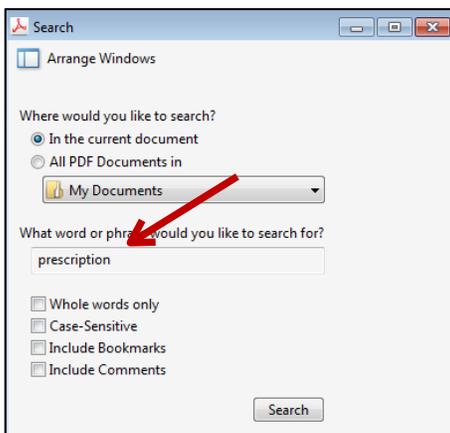


TIP: You can also access the *Find* window by selecting **Ctrl + F** from the keyboard.

2. Enter in the keyword you wish to search by (i.e. prescription).
3. Select the **Next** button to view the next page that contains the key word you searched.

To Use the Advanced Search Feature:

1. Select **Edit > Advanced Search**. The “Search” window opens.
2. Enter in the keyword you wish to search by (i.e. prescription).



TIP: You can also access the *Search* window by selecting **Shift + Ctrl + F** from the keyboard.

3. Select the **Search** button.
4. From the *Results* returned, select the page you wish to view.

Getting Started

Congratulations! Your store is now integrated with the New Brunswick Drug Information System (DIS)!! With the DIS integration you will notice some important changes in PharmaClik Rx. Before you begin transmitting claims to the DIS, it is important you read the information outlined below.

Introduction to eHealth

The New Brunswick Drug Information System (DIS) is an electronic system that allows authorized health care providers to share medication information. The Electronic Health Record (EHR) is a secure, private system that contains comprehensive patient information. A patient's EHR will contain vital information that will aid health professionals in providing appropriate and timely patient care.

PharmaClik Rx has worked closely with the New Brunswick Department of Health in order to develop a dispensary software that supports the conformance standards set out by the province. This user guide provides detailed instructions to help your pharmacy better understand how to navigate the New Brunswick DIS using PharmaClik Rx.

Client Registry

The Client Registry (CR) is a component of the patient's EHR that provides a consolidated source of client information for identification and demographic information for health service events.

The DIS solution scope of clients encompasses all people. An "all people" approach provides DIS patient profile information to authorized users for any patients who have drug therapy-related encounters (i.e. prescription order/dispense, recorded drug allergy/intolerance or adverse drug reaction, etc.) in the province by community and hospital based providers.

Glossary of Terms

Terminology	Translation
Animal	<p>Patient Status to indicate the patient is not an active patient, but perhaps a family pet. An Animal record will have no Provincial Health Number (PHN). Prescriptions for animals are not transmitted to the DIS.</p> <p>Animal status can also be used to record transactions for another pharmacy location (i.e. Pharmacy stock transfer).</p>
Client Registry	<p>A comprehensive registry of residents and other individuals who have had a health service in the province that contain patient client demographic information. This information can be reviewed by all users that have DIS Access.</p>
Clinician	<p>A Clinician may be a Prescriber, Dispenser or any other Authorized Health Care Professional given a role in the DIS.</p>
Create and Dispense	<p>The portion of the prescription that is recorded on the DIS. The Create is the original prescription information from the prescriber (either created electronically by the prescriber or transcribed by the pharmacist). All Create prescriptions are deemed as Inferred with New Brunswick.</p>
Detected Issue	<p>The list of clinical conflicts that have been detected and recorded involving a patient's drug administration.</p>
Device	<p>An instrument, apparatus, implement, machine, contrivance, implant, in vitro reagent, or other similar or related article, including any component, part, or accessory.</p> <p>NOTE: <i>Claims for Devices are not transmitted to the DIS; they remain local only.</i></p>
Drug Information System (DIS)	<p>A single, secure repository where health professionals can view all of the drugs dispensed to patients by a community pharmacy, regardless of the location or prescriber.</p>
Electronic Health Record (EHR)	<p>An EHR is a patient's medication profile that resides on the DIS. The EHR checkbox throughout PharmaClik Rx indicates whether the information resides on the DIS.</p> <p>NOTE: <i>To view a patient's full EHR Profile, users will need EHR Viewer access. A full EHR Profile view is not visible within PharmaClik Rx.</i></p>
Issue Management	<p>When a Detected Issue is brought to the attention of a health professional, it may be necessary to deal with it by entering an Issue Management(s). The Issue Management provides information to other health professionals regarding the actions or outcomes taken to resolve the Detected Issue(s).</p>

Terminology	Translation
	Currently the NB DIS does not support Issue Management.
Other Health Care Professional	Describes a healthcare provider from a regulated profession involved in the delivery of healthcare services.
Other Medication Record	<p>A record of a drug the patient is taking but was not prescribed through the system. This could be a recommended OTC product or a dispense that occurred out of province. This could also be used when a patient is provided a medication sample.</p> <p>NOTE: <i>Claims for Other Medications (DURs) are not transmitted to the DIS; they remain local only.</i></p>
Out of Province	A patient status that indicates the patient does not reside in this province. Prescriptions for Out of Province patients will be transmitted to the NB DIS just like an Active status patient.
Patient	A Patient is a person who is a recipient of a healthcare service.
Personal Health Number (PHN)	<p>A unique identification number assigned to a resident of a province. This number is used to store and retrieve all personal information, including their demographics, medication history and eligibility for publicly funded health care.</p> <p>NOTE: <i>In New Brunswick the patient's Health Care Number is called the New Brunswick Medicare Health Care Number. In order to maintain consistency, it is referred to as PHN throughout PharmaClik Rx and this User Guide.</i></p>
Pharmacist ID	Pharmacist Identification number refers to the dispensing pharmacist's license number.
Pickup	The province of New Brunswick does not support Pickup Messages.
Synchronized	The "Synchronized" checkbox indicates that the patient has been synchronized with the Client Registry. DIS activity can only be performed once a patient has been synchronized.

Establishing a Security Policy and Security Coordinator

Each pharmacy must ensure they have a security policy on file, as well as appoint a member of their team to be a "Security Coordinator".

The security policy on file (at a minimum) must include the following items:

- Acceptable use of computer resources by employees
- Password handling and security
- Computer terminal locking
- Handling of computer media
- Disposal of information assets, including media and storage devices
- Security incident management
- Patch management (how are upgrades performed)
- Change management
- Configuration management
- User enrolment and removal

The pharmacy manager or the Security Coordinator for the pharmacy should be responsible for ensuring positive identification of users prior to enrolment in their system or DIS. The roles and responsibilities of the Security Coordinator shall include, but are not necessarily limited to:

- Primary liaison with Department of Health (DH) for security related issues or topics.
- Immediate reporting of security breaches and incidents to the DH Security Officer and completion of Security Breach Forms.
- Ensuring that the controls set forth in this document and future DH directives pertaining to DIS vendor implementation are completed as prescribed.
- Updating internal security policies and processes as required.
- Primary contact for security events pertaining to the vendor implementation of DIS.
- Providing guidance to staff on security issues pertaining to the implementation of DIS.
- Meeting with the designated DIS security counterpart on a semi-annual basis.
- Work with DIS security counterpart when changes are made to the System Administrator's systems that may affect the overall security of DIS data or systems.

Managing User Accounts (Security Window)

Security modifications have been made to better support the National Association of Pharmacy Regulatory Authorities (NAPRA) and their minimum requirements set out for pharmacy dispensary systems. PharmaClik Rx supports role-based access control, allowing different users to have different levels of access depending on their job functions. For example, certain users can be authorized to view prescriptions but not to alter them. By mapping such access privileges to a small set of work-related roles, and then assigning users to those roles, the task of administering user privileges is simplified. It also prevents security mistakes that might otherwise occur if each type of access had to be directly mapped to each and every user.

The '**Security Administration Facility**' window will allow authorized users to add or remove users, manage role types and customize existing user access options. All PharmaClik Rx user accounts can be managed through this window, which is now accessed through the new **Security** button added within the More menu. The Security window is now broken into two tabs: [Users tab](#) and [Role Types tab](#).

The Administrator (ADM) user, or a user with administrator security access, will have the ability to select one of the following access types to the various folders/windows:

- **Full Access** User can view, modify and edit the specified folder/window.
- **Read Only Access** User cannot modify or edit, but can view the specified folder/window. In some instances, the user will be able to modify their own settings only (e.g. Password, DIS Password, Narcotic Password).
- **No Access** User cannot view, modify or edit the specified folder/window.

NOTE: For Reports Access, you will only be able to select either Full Access or No Access. There is no Read Only Access for reports.

Upon upgrade to PharmaClik Rx 1.8, all users will have the same permissions and access they had prior to the upgrade. Any new users added after the PharmaClik Rx 1.8 upgrade will have permissions based on their role type. Your pharmacy can modify the default folders and windows each role type has access to, as well as create custom role types. For example:

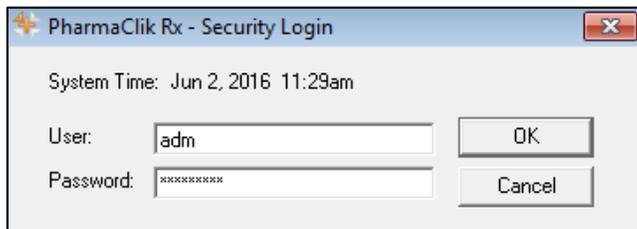
- A **Pharmacist** role type would have *Full Access* to everything and *Read Only* access to the Security window.
- A **Pharmacy Technician** role type would have *Full Access* to most folders/windows, but *Read Only* access to the Pricing Tab and Security window.
- An **Inventory Clerk** role type would have *Full Access* to the inventory folder/windows, and *No Access* to all other folders/windows.

Accessing the Security Window

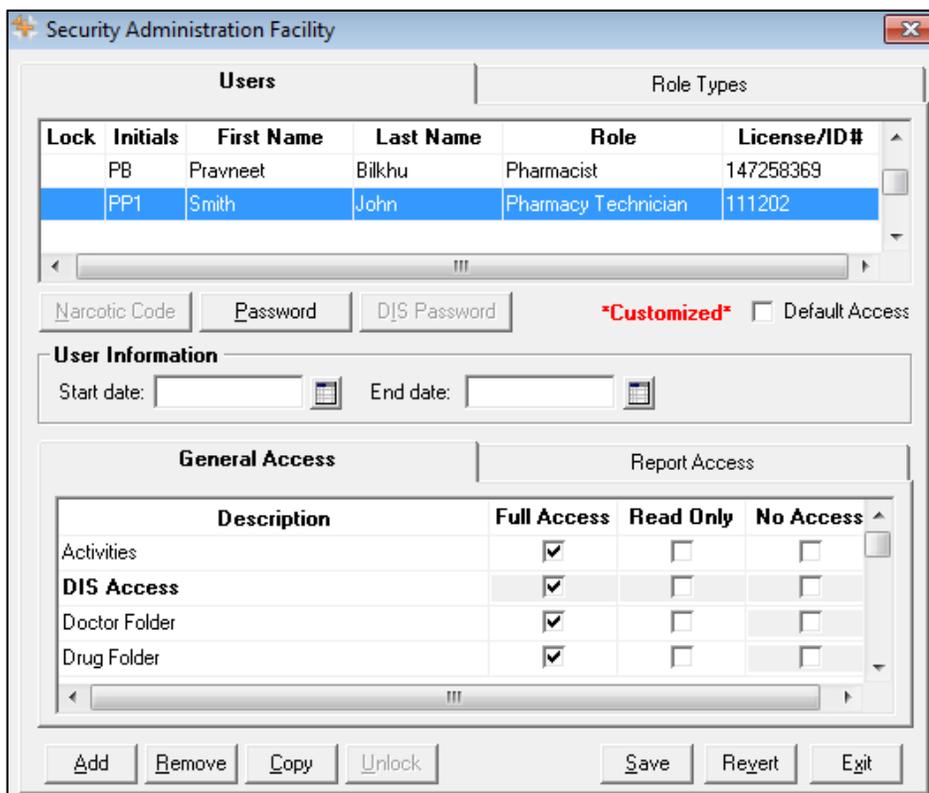
When accessing the Security Administration Facility window (also referred to as the Security window), users must now enter their PharmaClik Rx user and password. Any user can log into the Security window using their own credentials, regardless of which user is logged in to PharmaClik Rx.

To access the 'Security Administration Facility' window, do the following:

1. Select **More > Security**. The 'Security Login' window appears.



2. Enter the PharmaClik Rx login credentials of the user who wishes to access the Security window.
3. Select the **OK** button. The 'Security Administration Facility' window appears.



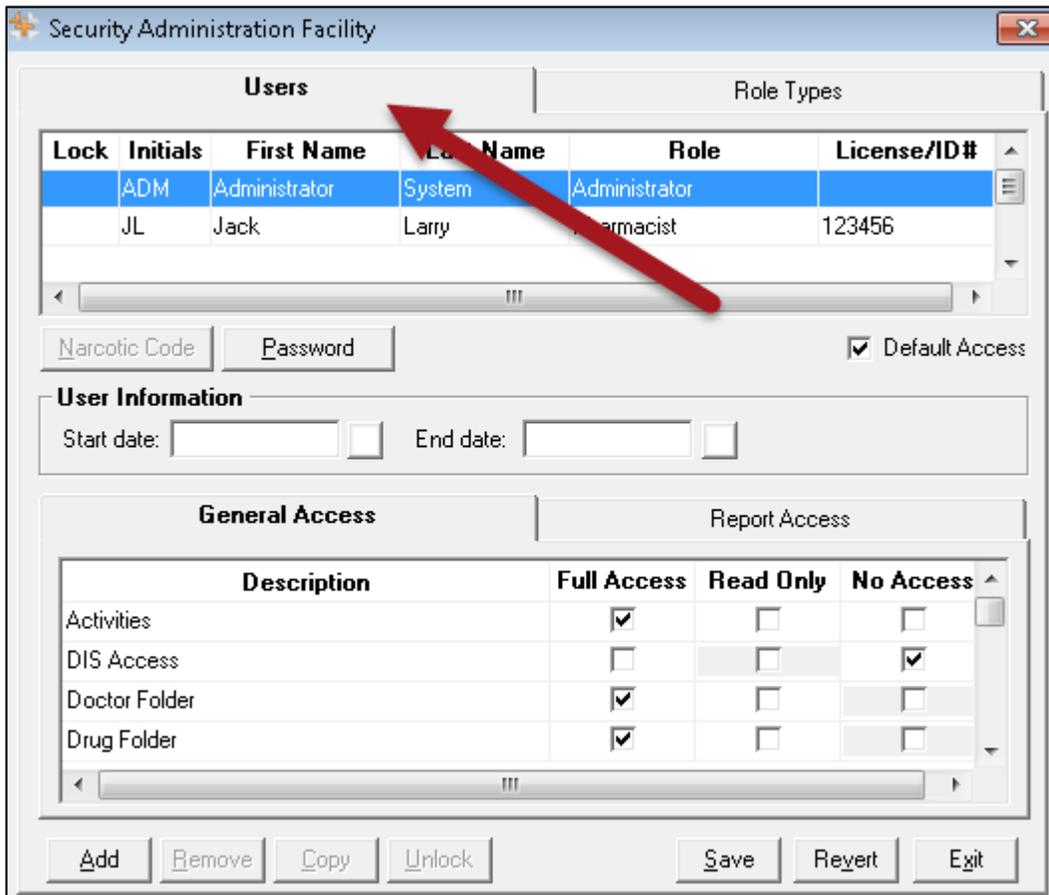
Lock	Initials	First Name	Last Name	Role	License/ID#
PB		Pravneet	Bilkhu	Pharmacist	147258369
	PP1	Smith	John	Pharmacy Technician	111202

NOTE: After the PharmaClik Rx 1.8 the upgrade, only the Administrator (ADM) user will have access to manage all user accounts. However, the ADM user can assign the same privileges to other users within PharmaClik Rx. For more information on how to do this, see [Setting Up Users with Administrator Security Access](#).

Users Tab

The Users tab permits the Administrator (ADM), or any user with administrator security access, to view and modify the access permissions for specific users. Any changes made in this tab will only be specific to the user highlighted at the top. If a user does not wish to make security customizations to all users that belong to the same role (e.g. pharmacist role type), then they can make specific changes to one user from here.

If you are logged in the 'Security Administration Facility' window as the Administrator (ADM), or a user with Administrator Security Access, all the users at your pharmacy will be visible in the top pane, along with their role, license # and additional user details.



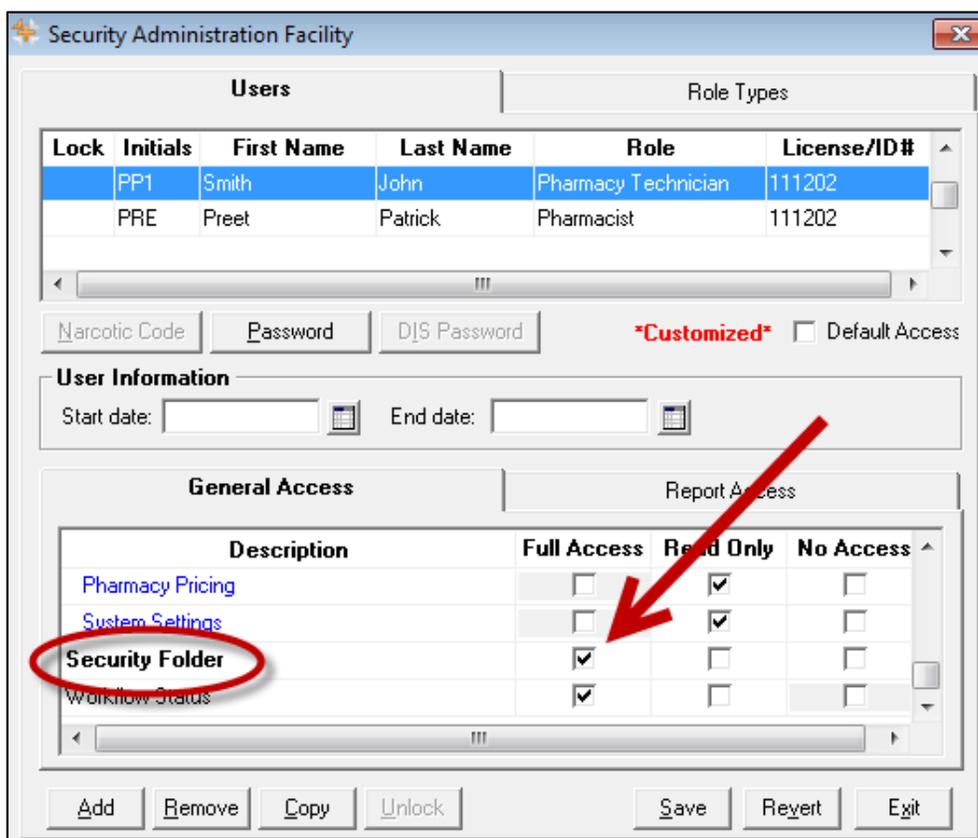
Setting Up Users with Administrator Security Access

Administrator Security Access would permit a user to manage users and assign roles, exactly as the Administrator (ADM) user would. A user with Administrator Security Access would also be able to reset the PharmaClik Rx password for a locked-out user.

NOTE: It is important that you do not give all users Administrator Security Access. This option should be limited and only provided to users who may need to access or manage all users (e.g. Pharmacy owner, etc.).

To give a user Administrator Security Access:

1. Select **More > Security**. The 'Security Login' window appears.
2. Enter the login credentials of the user who wishes to access the Security window. This user must be the Administrator (ADM).
3. Select the **OK** button. The 'Security Administration Facility' window appears.
4. Highlight the user you wish to provide Administrator Security Access.
5. From the *General Access* list select the **Full Access** checkbox located next to Security Folder, as shown below.



6. Select the **Save** button.

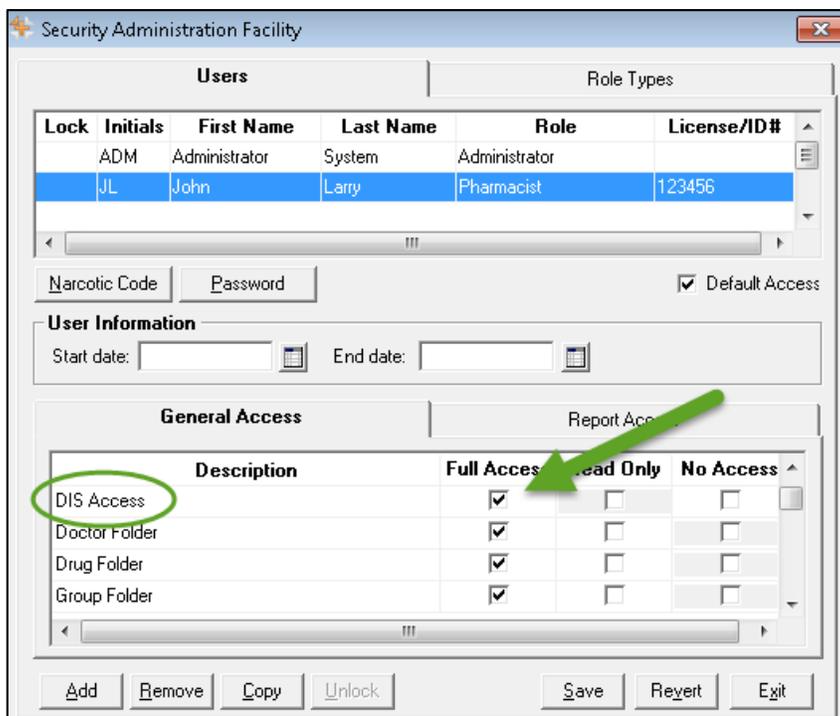
Setting Up Users with DIS Access

All PharmaClik Rx users must be registered with the New Brunswick DIS in order to have DIS access within PharmaClik Rx. If a user has not registered with the DIS, contact the Government of New Brunswick (GNB) Service Desk at **1-844-250-5250**. Once the mandatory training is completed by the user, the PharmaClik Rx Administrator (ADM) user can proceed to give the user DIS Access.

To set up users with DIS Access:

1. Ensure you have set up an account and completed the required DIS training with the Government of New Brunswick. If not, contact them at **1-844-250-5250**.
2. Log into PharmaClik Rx.
3. From the Workbench select **More > Security**.
4. Have the PharmaClik Rx Administrator (ADM) log in using their PharmaClik Rx credentials.
5. Highlight the appropriate user that you wish to provide DIS access to.
6. Select the **Full Access** checkbox for the *DIS Access* row.

NOTE: You must ensure the user has the correct license # entered in the *License/ID#* field. This will ensure that the registered user is able to successfully transmit transactions to the DIS.



7. Select the **Save** button. The DIS Access checkbox will now display Full Access. You will now be able to transmit transactions to the New Brunswick DIS.

Changing PharmaClik Rx Password

Password security credentials have changed to establish a higher security control as users now have access to more patient information. It is imperative that user passwords are not shared with other staff or written down anywhere where others can openly see it. If you must write down your password, ensure you do so in a secure and private place that only you have access to. McKesson Canada does not store or keep any user passwords on file so it is imperative you remember your passwords. Users must also change their PharmaClik Rx password every 60 days. When creating a new user password in PharmaClik Rx, your new password **must**:

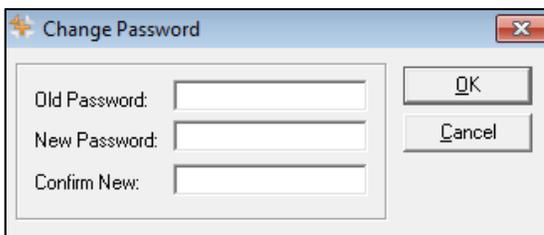
- Be a minimum of eight (8) characters long.
- Contain one character from all of the following four groups:
 - Uppercase characters (A–Z)
 - Lowercase characters (a–z)
 - Numbers (0–9)
 - Special Characters (e.g. !, #, \$, %, etc.)
- Not include some or all of your first name or last name.
- Not be reused if used in the previous 10 passwords.

The examples below illustrate passwords that meet the PharmaClik Rx password criteria.

Acceptable	Not Acceptable
SummeRx9#	summerrx9#
Jack!Frost2	Jack!frost
*PharmaClik1	*PharmaClik

To change your PharmaClik Rx password, do the following:

1. Select **More > Security**. The 'Security Login' window appears.
2. Enter the login credentials of the user who wishes to access the Security window.
3. Select the **OK** button. The 'Security Administration Facility' window appears.
4. Highlight your name from the list.
5. Select the **Password** button. The 'Change Password' window appears.



NOTE: If the Administrator (ADM) user is resetting your password, the *Old Password* field will be greyed out and upon first login, the user will be prompted to change their password.

6. Enter your old and new password.
7. Select the **OK** button.

NOTE: Once set, a password cannot be changed on the same calendar day.

Changing DIS Password

All New Brunswick PharmaClik Rx users must register with the NB DIS. Once registered, the user is provided with a temporary DIS Password.

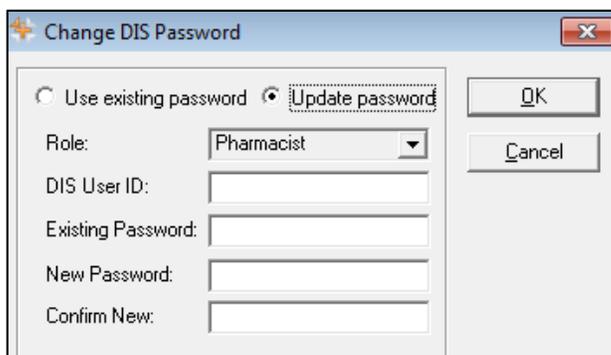
- New users must change the temporary issued password upon logging into PharmaClik Rx and prior to interacting with the DIS.
- Existing users with a valid DIS User ID and Password are now able to add their current password without creating a new one.

PharmaClik Rx will also prompt users to change their **DIS password every 90 days**. The DIS Password must be at least eight characters in length and must contain both alpha and numeric based characters. If your DIS password has expired, upon login you will get the following prompt:



To update your DIS password, do the following:

1. Select **More > Security**. The 'Security Login' window appears.
2. Enter the login credentials of the user who wishes to access the Security window.
3. Select the **OK** button. The 'Security Administration Facility' window appears.
4. Highlight the name of the user who wishes to update their DIS Password.
5. Select the **DIS Password** button. The 'Change DIS Password' window appears.



6. Select one of the following:
 - If the user needs to update their DIS password because it has expired, select the **Update password** radio button.
 - If the user is an existing DIS user and still has a valid password (e.g. transferred from another pharmacy, etc.), select the **Use Existing password** radio button.
7. Enter your **DIS User ID** and password(s) in the appropriate fields.
8. Select the **OK** button.

Resetting PharmaClik Rx Password for Locked-Out Users

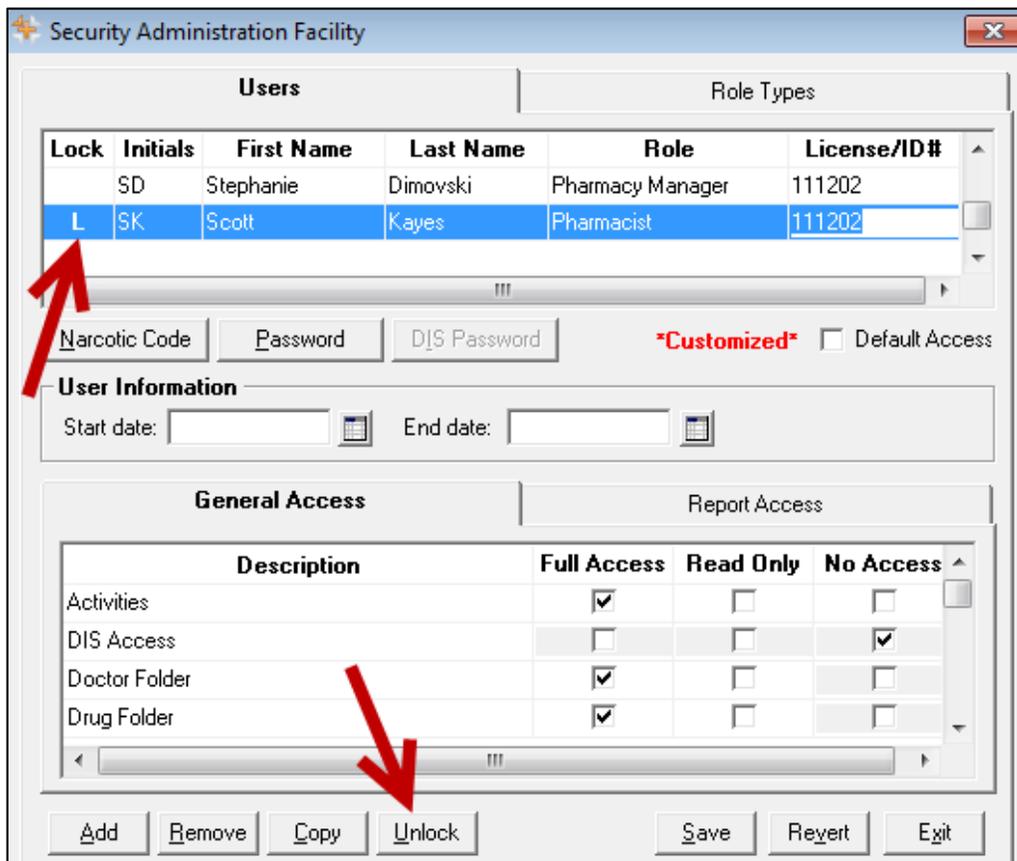
Users are restricted to three (3) log in attempts. After three unsuccessful attempts, a prompt will appear indicating that the user is locked-out of PharmaClik Rx. If locked-out, or a user cannot remember their password, only the PharmaClik Rx Administrator (ADM) or a user with Administrative Security Access can unlock them. The Administrator (ADM) user will set a temporary password, which the user will be prompted to change upon their next log on attempt.



It is imperative that users do not share their PharmaClik Rx or DIS password as all DIS activity is recorded in the History tab, along with the corresponding user.

To reset a PharmaClik Rx password for a locked-out user:

1. Select **More > Security**. The 'Security Login' window appears.
2. Enter the login credentials of the user who wishes to access the Security window. This user must be the Administrator (ADM).
3. Select the **OK** button. The 'Security Administration Facility' window appears.
4. Highlight the name of the user locked out (an **L** will appear next to the name of the user locked out, as shown in the image below).
5. Select the **Unlock** button. The 'Change Password' window appears.



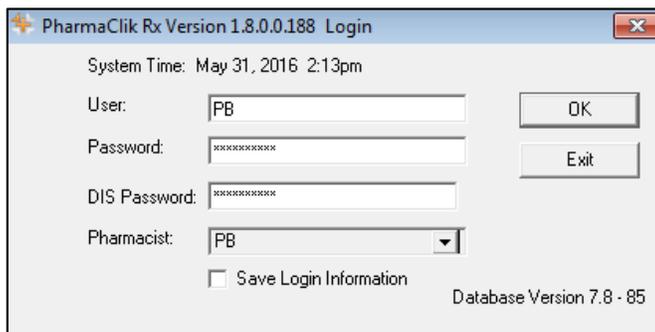
6. Enter in a new temporary password.
7. Select the **OK** button.
8. Log off of PharmaClik Rx as the Administrator and have the user you just reset the password for log back in, using the temporary password created above.
9. Upon login, a validation prompt will appear indicating you must change your password. Select the **OK** button. The 'Change Password' window will appear.
10. Enter a new password and select the **OK** button.

Adding New PharmaClik Rx Users

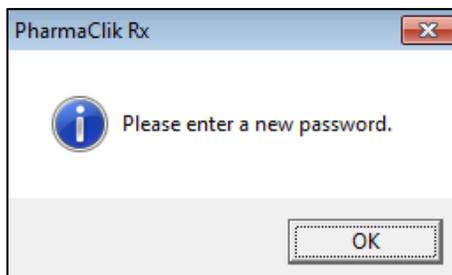
When adding new users, it is imperative that all user credentials are updated to reflect their Role Type and Licensing ID. The Administrator user (ADM) can no longer be used to process claims. Refer to the Pharmacy Board requirements as some interactions with the DIS cannot be performed by the Technician and must be performed by the Pharmacist.

To add a new PharmaClik Rx user:

1. Select the **More > Security**. The 'Security Login' window appears.
2. Enter the login credentials of the user who wishes to access the Security window. This user must be the Administrator (ADM) or have administrator access.
3. Select the **OK** button. The 'Security Administration Facility' window appears.
4. Select the **Add** button. The 'Add User Window' opens.
5. Enter the following information for the new user and select the **OK** button:
 - Initials
 - First Name
 - Last Name
 - Role Type
 - License/ID # (if applicable)
 - New Password (This is temporary and will be reset when the user first logs in)
6. Select the **Save** button.
7. Log out of PharmaClik Rx and have the new user you just created log back in, using the temporary password created above.



8. Upon login, the user will be prompted to change their password. Select the **OK** button. The 'Change Password' window will appear.

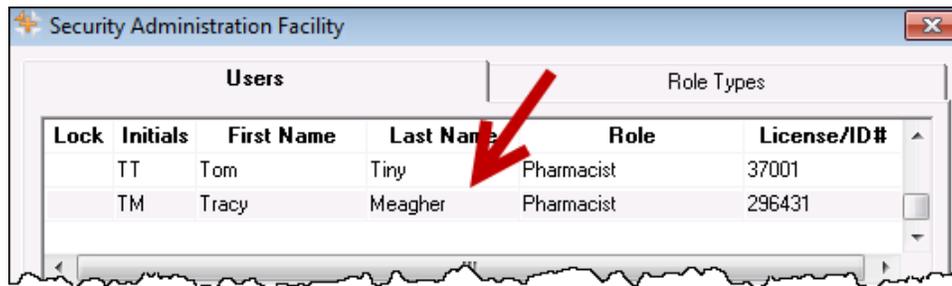


9. Enter a new password and select the **OK** button.

Removing Inactive PharmaClik Rx Users

If a user should no longer have access to PharmaClik Rx (e.g. no longer works at the pharmacy, etc.), they should be removed. Removing the user will not compromise any prescriptions or transactions completed by the user as they will continue to be linked to the removed user.

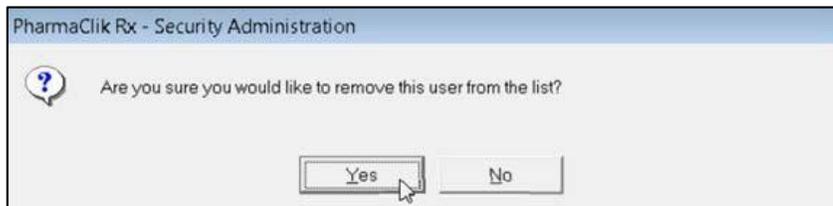
When a user is removed their initials will no longer display in any user dropdown lists, and they will be greyed out and moved to the bottom of the Users list in the Security Administration Facility window, as shown in the image below. If a user is not linked to any prescriptions or transactions, (e.g. manual adjustments, patient history, etc.), then their user will be deleted from the Users tab completely.



NOTE: Once a user is removed, it cannot be re-added or re-activated. You must create a new user.

To remove a PharmaClik Rx user:

1. Select the **More > Security**. The 'Security Login' window appears.
2. Enter the login credentials of the user who wishes to access the Security window. This user must be the Administrator (ADM) or have administrator access.
3. Select the **OK** button. The 'Security Administration Facility' window appears.
4. Highlight the user you wish to remove.
5. Select the **Remove** button. A validation prompt appears.



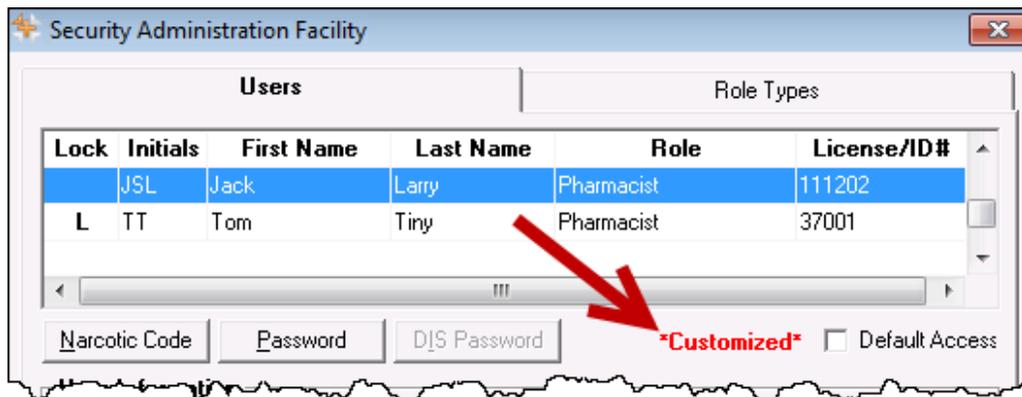
6. Select the **Yes** button. The user will be greyed out and moved to the bottom of the Users list.

Modifying General or Report Access for a Specific User

As noted above, the Administrator (ADM) user, or a user with administrator security access, will have the ability to select one of the following access types to the various folders/windows:

- **Full Access** User can view, modify and edit the specified folder/window.
- **Read Only Access** User cannot modify or edit, but can view the specified folder/window. In some instances, the user will be able to modify their own settings only (e.g. Password, DIS Password, Narcotic Password).
- **No Access** User cannot view, modify or edit the specified folder/window.

If at any point the permissions a specific user has differ from the permissions assigned to that Role Type (as indicated in the Role Types tab), an indicator will appear notifying you the user's access is customized, as shown below:

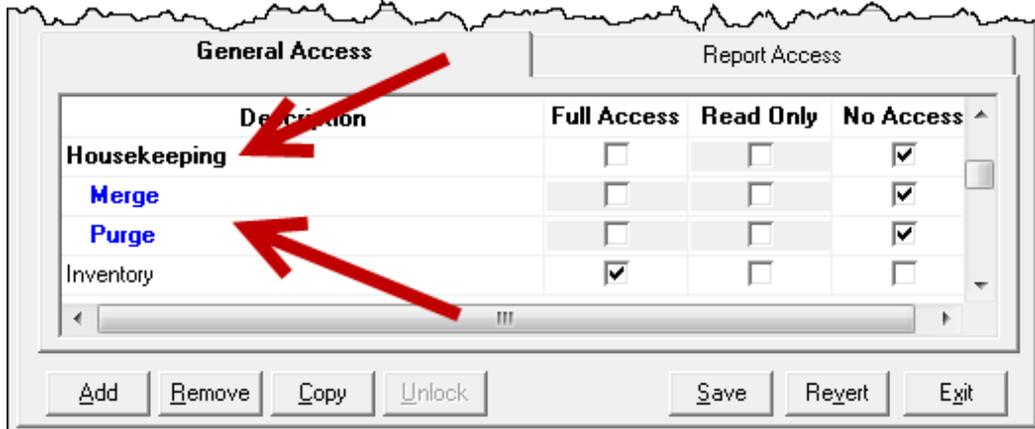


NOTE: After the PharmaClik Rx 1.8 the upgrade, a number of your users will have ***Customized*** appear when the user is highlighted. This is because the permissions they had prior to PharmaClik Rx 1.8 will be retained and will likely differ from the default set in the Role Types tab. To have the user permissions for a specific user match the default for their role, select the **Default Access** checkbox. See [Resetting Users to Default Access](#) for more information.

To customize General or Report Access for a specific user:

1. Select the **More > Security**. The 'Security Login' window appears.
2. Enter the login credentials of the user who wishes to access the Security window. This user must be the Administrator (ADM) or have administrator security access.
3. Select the **OK** button. The 'Security Administration Facility' window appears.
4. Highlight the user you wish to modify access for.

- From the **General Access** tab, select the appropriate checkboxes for the folders/windows you wish to customize access for (e.g. Full Access, Read Only, No Access).
- From the **Reports Access** tab, select the appropriate checkboxes for the reports you wish to provide the user access to (e.g. Full Access, or No Access).



NOTE: You cannot assign a child row more access than the parent row. For example, a user cannot have **No Access** to Housekeeping (parent row), but **Full Access** to Merge and Purge (child rows). PharmaClik Rx will automatically update the parent row with the corresponding access and grey out the other access options.

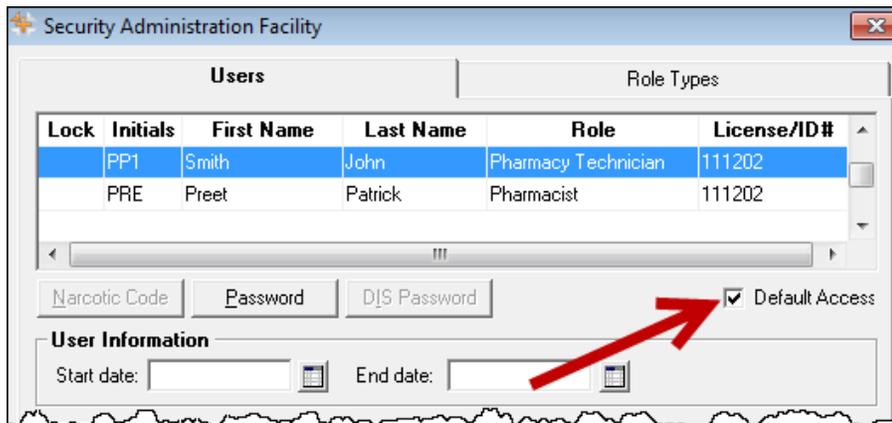
- Select the **Save** button.

Resetting Users to Default Access

In the Role Types tab, each role will have a set of default access permissions based on what is deemed necessary for a user in that role to access within PharmaClik Rx. If you modified the access permissions for a specific user, you can reset the permissions to match the default access as specified for that role type in the Role Types tab.

To reset a user’s access to the default access based on their role type:

1. Select the **More > Security**. The ‘Security Login’ window appears.
2. Enter the login credentials of the user who wishes to access the Security window. This user must be the Administrator (ADM) or have administrator security access.
3. Select the **OK** button. The ‘Security Administration Facility’ window appears.
4. Highlight the user you wish to modify access for. If the user’s access permissions are different from the default access for that role type, a ***Customized*** indicator will display.
5. Select the **Default Access** checkbox. The ***Customized*** indicator will disappear.



6. Select the **Save** button.

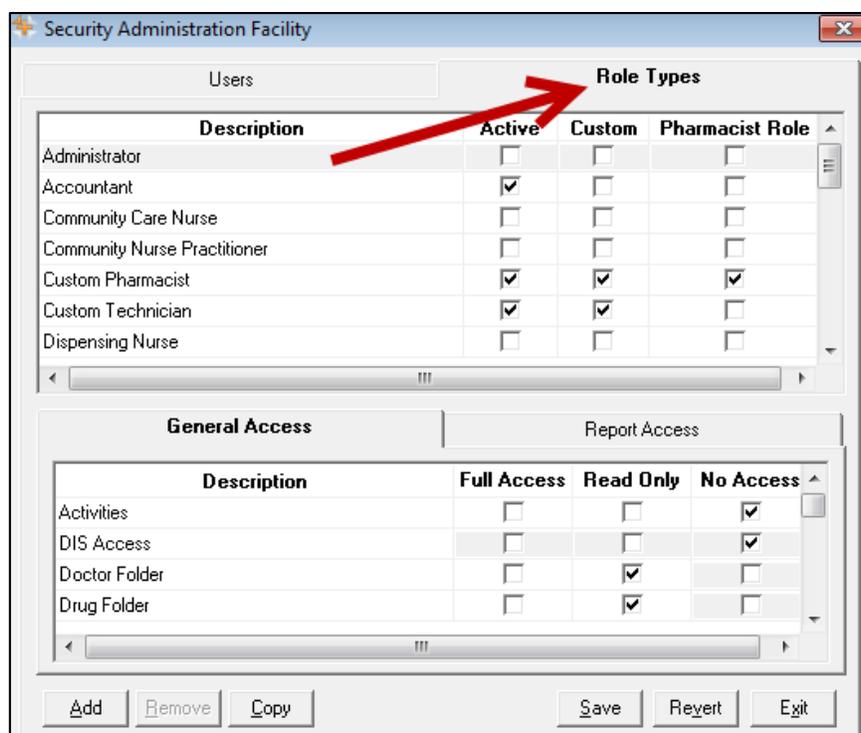
Role Types Tab

The Role Types tab permits the Administrator (ADM), or any user with administrator security access, to view and modify the access permissions users have based on their role type (e.g. pharmacist, technician, pharmacy manager, etc.).

The Role Types tab will display the following default roles and have the appropriate General Access and Report Access permissions assigned based on what is deemed necessary for the role type:

- Administrator
- Accountant
- Community Care Nurse
- Community Nurse Practitioner
- Dispensing Nurse
- Dispensing Physician
- Inventory Clerk
- Laboratory Technicians
- Nurse
- Nurse Hospital
- Nurse Practitioner Hospital
- Other
- Pharmacist
- Pharmacist Hospital
- Pharmacist Special
- Pharmacy Assistant
- Pharmacy Manager
- Pharmacy Student
- Pharmacy Technician
- Physician
- Physician Emergency
- Physician Office Staff
- Physician Specialist
- Provider
- Relief Pharmacist
- Students

All roles, including any custom created role types, will be displayed in alphabetical order.

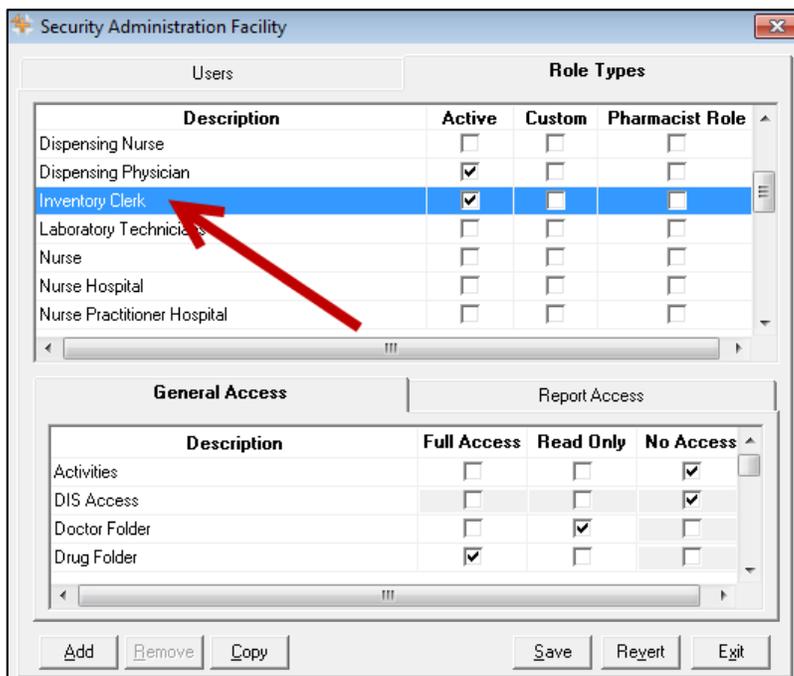


Modifying General or Report Access for a Specific Role Type

You can customize the access that users have within PharmaClik Rx based on their role type. For example, you can ensure that an Inventory Clerk role type only has access to the folders and windows in PharmaClik Rx that are relevant to the inventory clerk role (e.g. Drug Folder, etc.).

To customize General or Report Access for a role type, do the following:

1. Select the **More > Security**. The 'Security Login' window appears.
2. Enter the login credentials of the user who wishes to access the Security window. This user must be the Administrator (ADM) or have administrator security access.
3. Select the **OK** button. The 'Security Administration Facility' window appears.
4. Highlight the role type you wish to modify access for.
5. From the **General Access** tab, select the appropriate checkboxes for the folders/windows you wish to customize access for (e.g. Full Access, Read Only, or No Access).
6. From the **Reports Access** tab, select the appropriate checkboxes for the reports you wish to provide the role type access to (e.g. Full Access, or No Access).



NOTE: You cannot assign a child row more access than the parent row. For example, a role type cannot have **No Access** to Housekeeping (parent row), but **Full Access** to Merge and Purge (child rows). PharmaClik Rx will automatically update the parent row with the corresponding access and grey out the other access options.

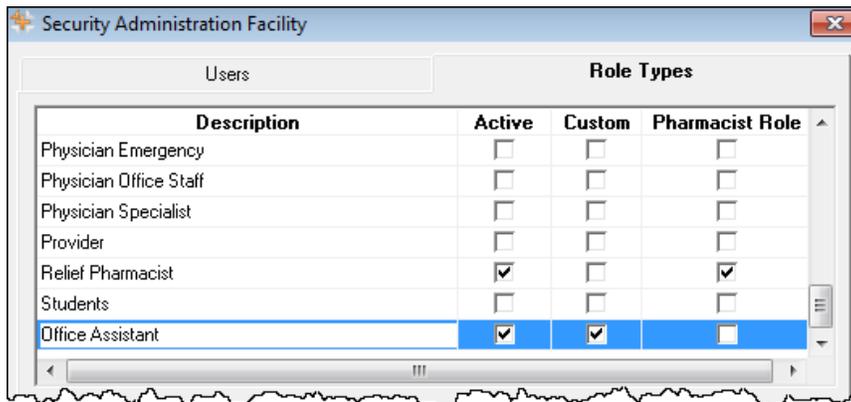
7. Select the **Save** button.

Adding Role Types

With the PharmaClik Rx 1.8 upgrade your pharmacy will have an extensive list of role types available to use and assign within your pharmacy. If you do not see a role type that your pharmacy uses, or wish to create your own, you may do so within the Role Types tab. All custom role types created by a pharmacy will have the **Custom** checkbox selected.

To create a new role type, do the following:

1. Select the **More > Security**. The 'Security Login' window appears.
2. Enter the login credentials of the user who wishes to access the Security window. This user must be the Administrator (ADM) or have administrator security access.
3. Select the **OK** button. The 'Security Administration Facility' window appears.
4. Review the list of role types to ensure you are not creating a duplicate.
5. Select the **Add** button. A new blank row appears at the bottom with the **Active** and **Custom** checkboxes selected.



6. If the new role is a pharmacist role, select the **Pharmacist Role** checkbox.

NOTE: Selecting the **Pharmacist Role** checkbox indicates to the other users this user has the ability to dispense prescriptions. Only select this checkbox if the custom role you are creating is for a pharmacist.
7. From the **General Access** tab, select the appropriate checkboxes for the folders/windows you wish to provide the new role type access to (e.g. Full Access, Read Only, or No Access).
8. From the **Reports Access** tab, select the appropriate checkboxes for the reports you wish to provide the new role type access to (e.g. Full Access, or No Access).
9. Select the **Save** button. This new role type will now appear in dropdown menus for selection.

Inactivating Role Types

The extensive list of role types will be available within the Role types tab. If your pharmacy does not need or use some of the role types, you can inactivate them so they do not appear in any dropdown menus within PharmaClik Rx. Should you require the role type to be available later, you can re-activate it, making it available for selection. You can only inactivate a role type that is not in use. If the role type is assigned to a user, then the following prompt will appear:

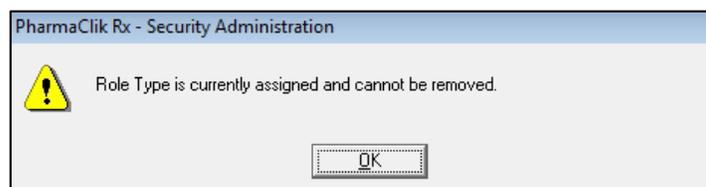


To inactivate a role type that is not in use, do the following:

1. Select the **More > Security**. The 'Security Login' window appears.
2. Enter the login credentials of the user who wishes to access the Security window. This user must be the Administrator (ADM) or have administrator security access.
3. Select the **OK** button. The 'Security Administration Facility' window appears.
4. Deselect the **Active** checkbox for the role you wish to make inactive.
5. Select the **Save** button.

Removing Role Types

You can only remove a custom role type that your pharmacy created that is not in use. All custom role types will have the **Custom** checkbox selected, indicating the role was created by the pharmacy and not one of the default role types available. All other default role types cannot be removed. If the role type is assigned to a user, the following prompt will appear:



To remove a role type not assigned to a user, do the following:

1. Select the **More > Security**. The 'Security Login' window appears.
2. Enter the login credentials of the user who wishes to access the Security window. This user must be the Administrator (ADM) or have administrator security access.
3. Select the **OK** button. The 'Security Administration Facility' window appears.
4. Highlight the role type you wish to remove.
5. Select the **Remove** button.
6. Select the **Save** button.

Language Preferences

The province of New Brunswick is the only official bilingual province in Canada and as such, PharmaClik Rx supports the ability to transmit French instructions (SIGs) to the DIS. The following French characters are supported in PharmaClik Rx and the New Brunswick DIS:

à	ê	û	ç	î	È
â	ë	ü	Ç	Ô	é
ä	ï	É	è	Ü	À
Â	Ù	ù	Û	Ê	ô

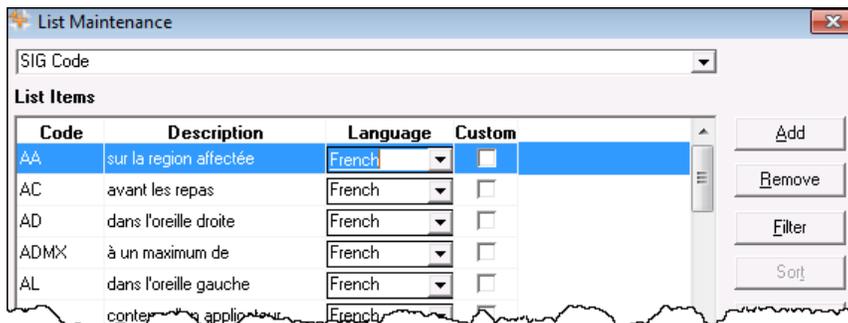
Viewing SIG Language

To review the list of French SIG Codes, do the following

1. From the Workbench, select **More > List Maint.**
2. Search for and select **SIG Code** from the dropdown list.
3. Select the **Filter** button. The 'Filter' window opens.



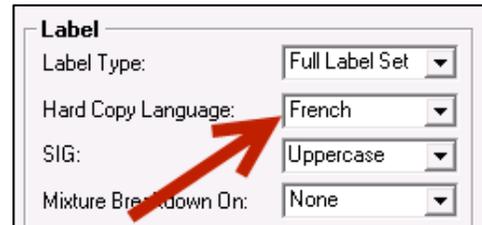
4. Enter **French** and select the **OK** button. All French SIG Codes will appear.



Setting Hard Copy Language

To modify your language preference for Hard Copies that print for prescriptions, do the following:

1. From the Workbench, select **More > Pharmacy**.
2. Select the **Rx Detail** tab.
3. From the **Hard Copy Language** dropdown field, select your language preference.
4. Select the **Save** button.



Label

Label Type: Full Label Set

Hard Copy Language: French

SIG: Uppercase

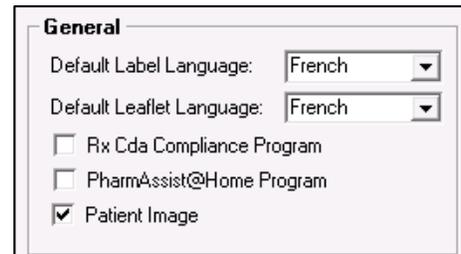
Mixture Breakdown On: None

Setting Default Label Language

If you modify your default label language to French, the French translation will be transmitted to the DIS, not English.

To modify your default language preference for your labels, do the following:

1. From the Workbench, select **More > Pharmacy**.
2. Select the **Patient** tab.
3. From the **Default Label Language** dropdown field, select your language preference.
4. Select the **Save** button.



General

Default Label Language: French

Default Leaflet Language: French

Rx Cda Compliance Program

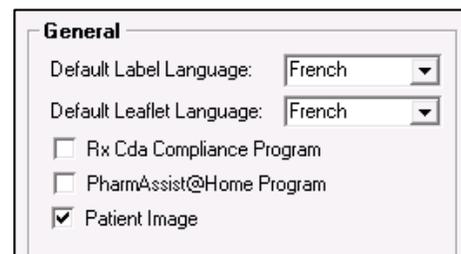
PharmAssist@Home Program

Patient Image

Setting Default Leaflet Language

To modify your default language preference for your leaflets, do the following:

1. From the Workbench, select **More > Pharmacy**.
2. Select the **Patient** tab.
3. From the **Default Leaflet Language** dropdown field, select your language preference.
4. Select the **Save** button.



General

Default Label Language: French

Default Leaflet Language: French

Rx Cda Compliance Program

PharmAssist@Home Program

Patient Image

DIS Preferences

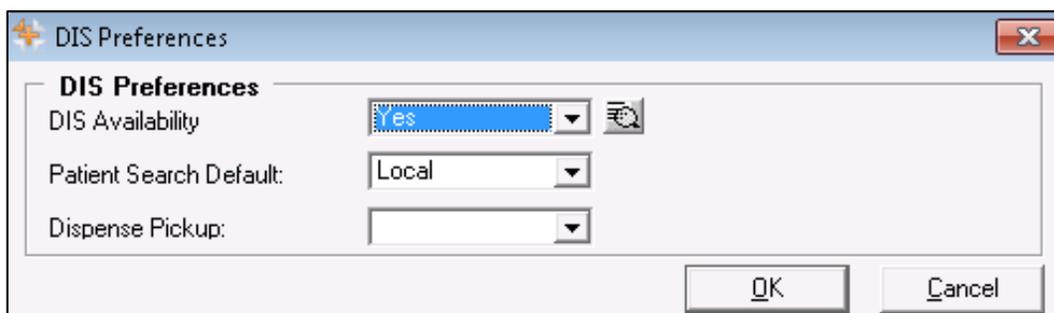
The DIS Preferences window allows you to set the following options:

DIS Availability	When the connection to the DIS is lost, or the network is down for an extended period of time, the DIS Availability can be set to NO. This will automatically place DIS transactions into the DIS Queue for later processing (see the DIS Queue section for more information). An audit trail will be created each time this preference is modified.
Patient Search Default	Defines the default Patient Search option (i.e. Local or Combined). The preferred option is to always look locally before accessing the Client Registry. New patients should <u>never</u> be added until a thorough search on the Client Registry is performed.
Dispense Pickup	This field is disabled as Pickup is not supported in New Brunswick. If your pharmacy supports workflow through scanning at your POS Register, this will not be impacted.

Setting DIS Preferences

To access the DIS Preferences, do the following:

1. Select **More > New Brunswick**. The 'DIS Preferences' window will appear.



2. Set your preferences.

NOTE: If you are changing the *DIS Availability*, you will be prompted to enter a reason. This field is required.

3. Select the **OK** button.

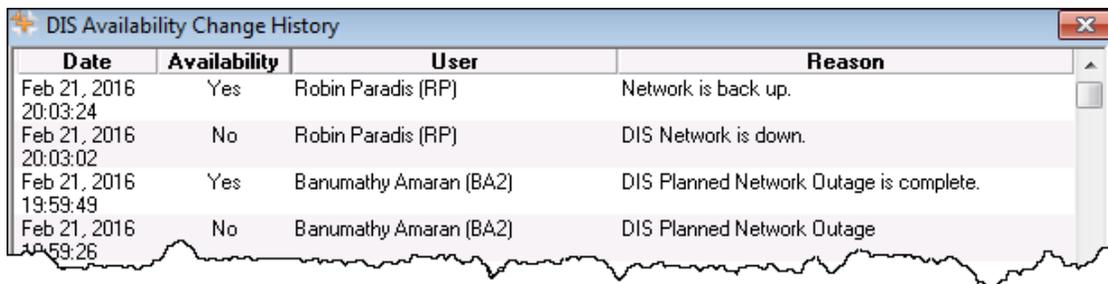
Viewing DIS Availability Change History

When the DIS Availability is changed, the following information is recorded in PharmaClik Rx:

- Date the change was made
- What the DIS Availability was changed to (i.e. Yes or No)
- User who made the change
- Reason for the change

To view the change history, do the following:

1. Select **More > New Brunswick**. The 'DIS Preferences' window will appear.
2. Select the magnifying glass icon  located next to the *DIS Availability* field. The 'DIS Availability Change History' window opens.



Date	Availability	User	Reason
Feb 21, 2016 20:03:24	Yes	Robin Paradis (RP)	Network is back up.
Feb 21, 2016 20:03:02	No	Robin Paradis (RP)	DIS Network is down.
Feb 21, 2016 19:59:49	Yes	Banumathy Amaran (BA2)	DIS Planned Network Outage is complete.
Feb 21, 2016 19:59:26	No	Banumathy Amaran (BA2)	DIS Planned Network Outage

3. Once you are done viewing the change history, select the **OK** button.

Searching for & Synchronizing a Patient

With DIS integration, New Brunswick pharmacies must thoroughly search the Client Registry to ensure a patient EHR Profile does not already exist prior to creating a new profile.

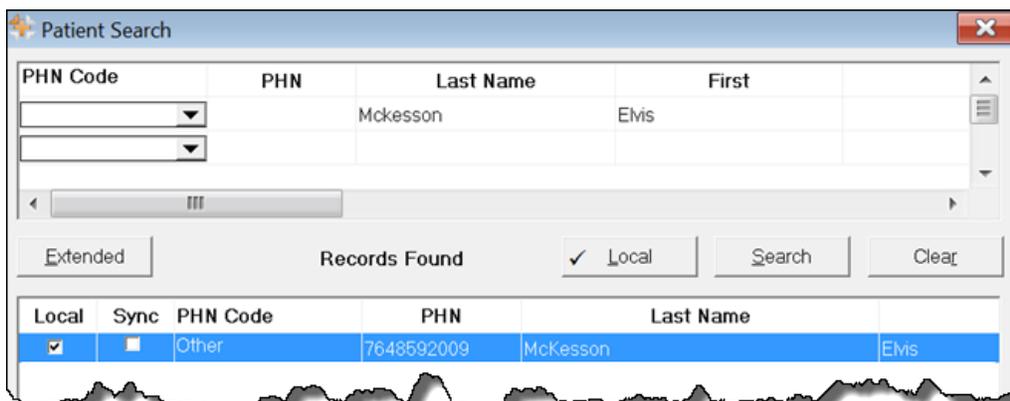
Patient Search Window

With DIS integration, you now have 2 search options when searching for a patient: a local search, or a combined search. In the 'Patient Search' window:

- The **Local** button will complete a local search within PharmaClik Rx.
- The **Search** button will perform a combined search within PharmaClik Rx and the CR. The default search option is set in the DIS Preferences. See the [Setting DIS Preferences](#) section for more information.

When NB DIS integrated pharmacies try to search for a patient, there are [4 possible scenarios](#) they may encounter. For each scenario, it is important to ensure that the Patient Folder is synchronized with the patient information on the Client Registry (CR). For more information, see the [Synchronization](#) section.

From the 'Patient Search' window, PharmaClik Rx users will be able to identify which patients are local, synchronized, or neither, by using the *Local* and *Sync* checkboxes. The sample patient below is a local patient that has yet to be synchronized with the Client Registry.

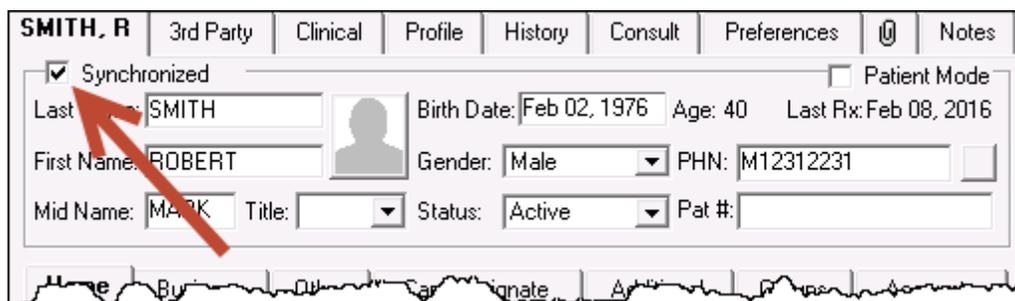


NOTE: When searching the Client Registry the preferred search option is to use the patient's Personal Health Care Number (PHN).

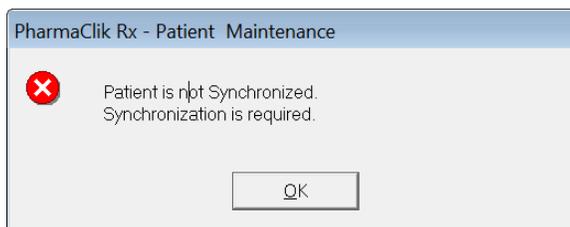
Synchronization

In order for any interaction to occur with the DIS, a patient’s information in PharmaClik Rx must be synchronized with the Client Registry. Synchronization ensures that the correct patient is selected and allows the patient information maintained on the CR to be accurate.

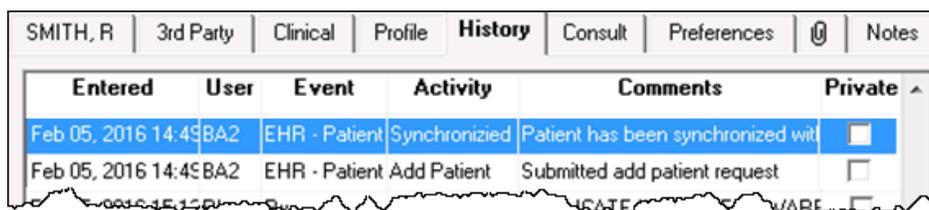
A new **Synchronized** checkbox has been added to the Patient Folder. If checked, this will indicate when the patient’s local record has been synchronized with the CR.



It is imperative that every Patient Folder is synchronized prior to any interaction with the DIS. If a user attempts to transmit information to the DIS for a patient that has not been synchronized (i.e. fill a prescription, etc.), the following prompt will appear:



Once you synchronize your patient, a new row will be added in the patient History tab with the Activity - *Synchronized*:



Upon patient synchronization, the following patient fields will be transmitted to the DIS:

- Last Name
- First Name
- Middle Name
- Birth Date
- Gender
- PHN
- Addr Line 1
- City
- Post Code
- Phone
- Country
- Alias and Maiden

NOTE: Any phone number extension entered in the *Ext* field is not transmitted to the DIS.

Client Registry Search Criteria

A local patient search within PharmaClik Rx can be done using any search criteria, as per existing functionality. When searching for patient on the Client Registry (CR), you must use one of the following search combinations:

- Health Care Number (PHN Code and PHN) *recommended
- Last Name and Date of Birth
- Last and First Name and Phone Number OR Postal Code
- Last and First Name and Date of Birth
- Last Name, Phone or Postal Code
- Phone Number

The **PHN Code** is a new field added to the Patient's 3rd Party tab as well as the search criteria and search results window. The PHN Code indicates the type of PHN your patient has (i.e. NB Medicare, NS Medication, Other PHN, etc.). When searching the CR, selecting the PHN Code type and PHN is highly recommended as it helps to narrow your search criteria. For more information, refer to the [PHN Code](#) section.

The suggested preference would be to search using the *PHN Code* and *PHN* to obtain the exact match. When completing a search on the CR, a wildcard search using % is not permitted. When a search query on the CR is performed, a maximum of 50 search results will be returned. If the number of results that match your search criteria is greater than 50, then the following prompt will display:



Tips for Searching

When searching for a patient, the more data you provide, the better (more accurate) your results will be. The name search searches all name fields, even if specified in the wrong field. This way if you are unable to determine which is a first or last name, or if it had previously entered it incorrectly, a search for Scott Peter, will return Peter Scott as well.

Your search criteria can contain the following:

- capitals letters
- hyphens
- transpositions in names
- prefixes
- suffixes
- apostrophe's
- nicknames (i.e., Bob instead of Robert)

NOTE: Wildcard characters are not valid (i.e. typing J*, J% instead of Jones).

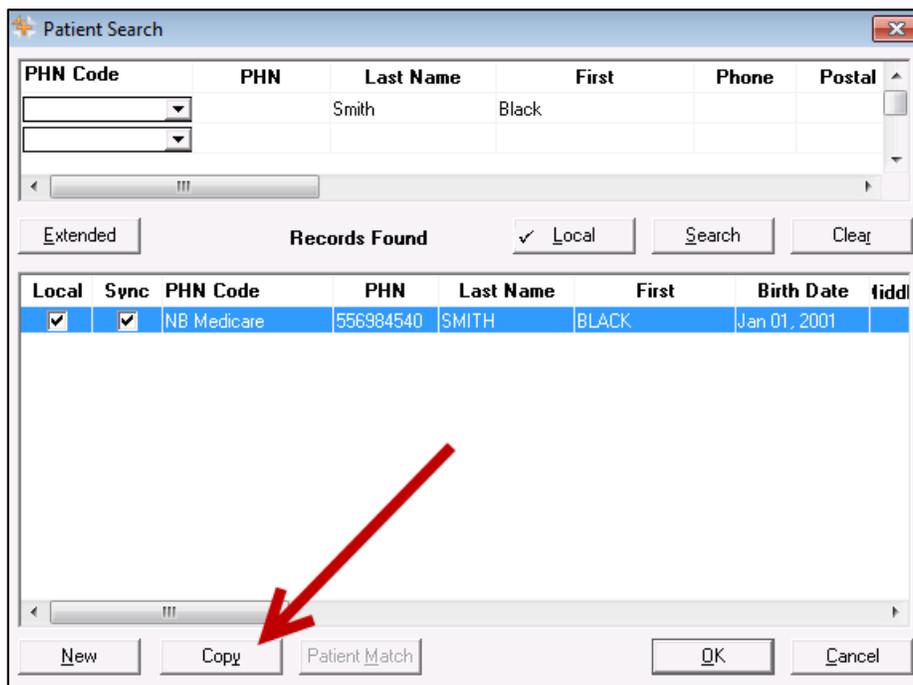
Client Registry name searching is based on a phonetic algorithm, allowing you to search for names that are not an exact match but sound the same. Phonetic matching capabilities allow names like "John" and "Jon" to compare. In addition, a nickname table supports the mapping of name and nicknames. For example:

- "Bob" can be mapped to "Robert,"
- "Abby" can be mapped to "Abigail,"
- "Jonathon" can be mapped to "John"

HINT: Users are encouraged to utilize the different fields available when searching for a patient. When using the Postal Code to search, you may need to search in the following formats: **E3E 3E3** (with a space) and **E3E3E3** (without space).

Using Patient Copy

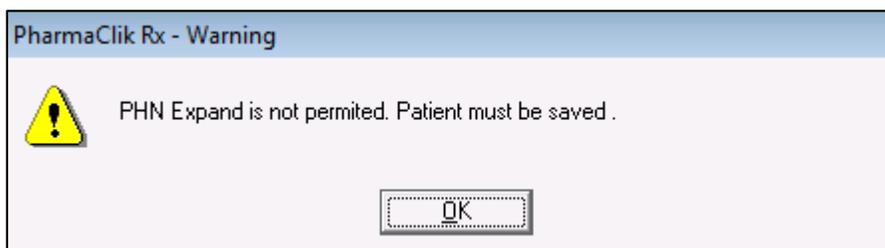
The Patient Copy function located in the Patient Search window is only available when the patient is local (as indicated by the Local checkbox). With access now to the Client Registry it may be faster to look for the patient in the Client Registry and copy the record from this location than to perform the local Copy function.



When you select the Copy button, the patient's demographic information will be copied to a new Patient Folder, however the Patient Folder will not be synchronized.

NOTE: If you use the **Copy** button, you must **Save** the Patient Folder and then proceed to synchronize the patient with the Client Registry by using the PHN Expand  icon located next to the PHN field. This is imperative as prescriptions cannot be filled for a patient that is not synchronized.

If you select the PHN Expand  icon for a patient that is not saved, the following prompt will appear:



Search Scenarios

The following 4 scenario workflows below provide the steps necessary to search for a patient and synchronize them.

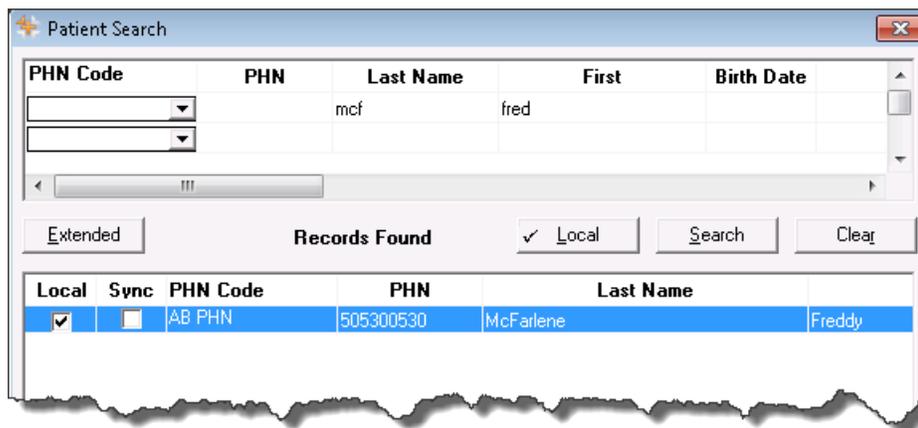
Scenario 1: Existing PharmaClik Rx Patient / Existing CR Patient

You will encounter this scenario if the patient is an existing customer at your pharmacy and exists on the Client Registry.



This scenario will be the most common upon DIS activation. A majority of your patients will already exist locally and all NS residents can be found in the CR.

1. Select the **Patient** button. The 'Patient Search' window will open.
2. Enter the search criteria for a patient and select the **Local** button. The search results will display matching local results.



Local	Sync	PHN Code	PHN	Last Name
<input checked="" type="checkbox"/>	<input type="checkbox"/>	AB PHN	505300530	McFarlene

3. Highlight the local patient record and select the **OK** button. The Patient Folder opens.
 4. In the main tab, select the **PHN Expand** button. The 'Patient Search – Client Registry' window will open with the local patient information as search criteria.
 5. Highlight the matching result that is displayed.
 6. Select the **Compare** button. The 'Patient Comparison' window will appear.
 7. The local patient information and the Client Registry information will be displayed. Confirm that the patient selected from the Client Registry matches the local record.
 8. If required, update your local information by highlighting fields from the Client Registry and selecting the left directional arrow . For more information, see the [Patient Compare](#) section.
- NOTE:** The patient's **PHN Code** and **PHN** will already be populated in the 3rd Party tab. If the PHN Code is incorrect or not populated, modify it in the 3rd Party tab.
9. Select the **OK** button.
 10. Select the **Save** button.

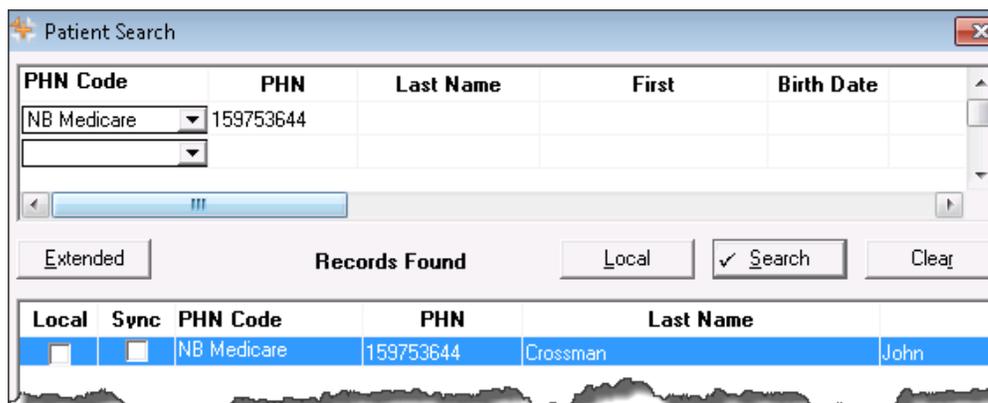
The **Synchronized** checkbox will also be selected to indicate that the patient folder has been successfully synchronized with the CR.

Scenario 2: New PharmaClik Rx Patient / Existing CR Patient

You will encounter this scenario if this is the first time the patient has come to your pharmacy, but are a NB resident. This scenario will be used for a patient that exists in the Client Registry.

1. Select the **Patient** button. The 'Patient Search' window will open.
2. Enter the search criteria for the patient and select the **Local** button. The search results will indicate *No Records Found*.
3. Select the **Search** button. The search results will display an existing CR record.

NOTE: The **Sync** and **Local** checkboxes will be deselected, as shown with the highlighted record below.



4. Highlight the existing CR patient record and select the **OK** button. The Patient Folder will be populated with the demographic information from the CR.
5. If required, update any patient information.

NOTE: The patient's **PHN Code** and **PHN** will already be populated in the 3rd Party tab. If the PHN Code is incorrect or not entered, modify it in the 3rd Party tab.

6. Select the **Save** button.

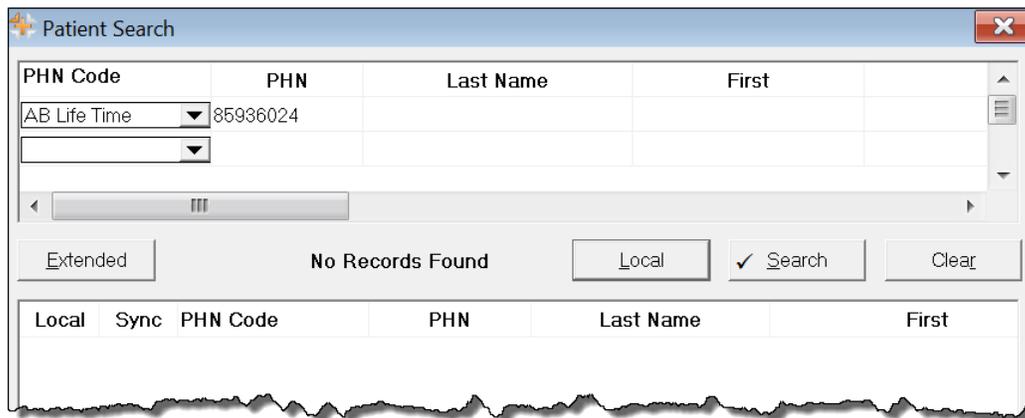
The Patient Folder is saved locally. The **Synchronized** checkbox will also be selected to indicate that the new patient folder has been successfully synchronized with the CR.

Scenario 3: New PharmaClik Rx Patient / New CR Patient

You will encounter this scenario if this is the first time the patient has come to your pharmacy, are not a resident of NB and is the first time they have received a health care service in NB. All NB residents with a Medicare Number will exist in the Client Registry. This scenario will be used mostly when a patient is from out of province.

1. Select the **Patient** button. The 'Patient Search' window will open.
2. Enter the search criteria for the patient and select the **Local** button. The search results will indicate *No Records Found*.
3. Select the **Search** button. The search results will either indicate *No Records Found*, or the results returned will not match the patient.

NOTE: You must always perform a CR search before adding a new patient to the CR. The only time a patient should be added without first searching the CR is when the DIS is down. Ensure that all search options are exhausted before adding a new patient to the CR.



4. Select the **New** button. A new Patient Folder will open.

NOTE: Before adding a new patient, it is imperative that you exhaust all search options to validate that the patient does not already exist on the CR.
5. Enter all related patient information for the new patient.
6. Select the **3rd Party** tab.
7. Select a **PHN Code** type from the dropdown list and ensure the **PHN** field is populated.
8. Select the **Save** button.

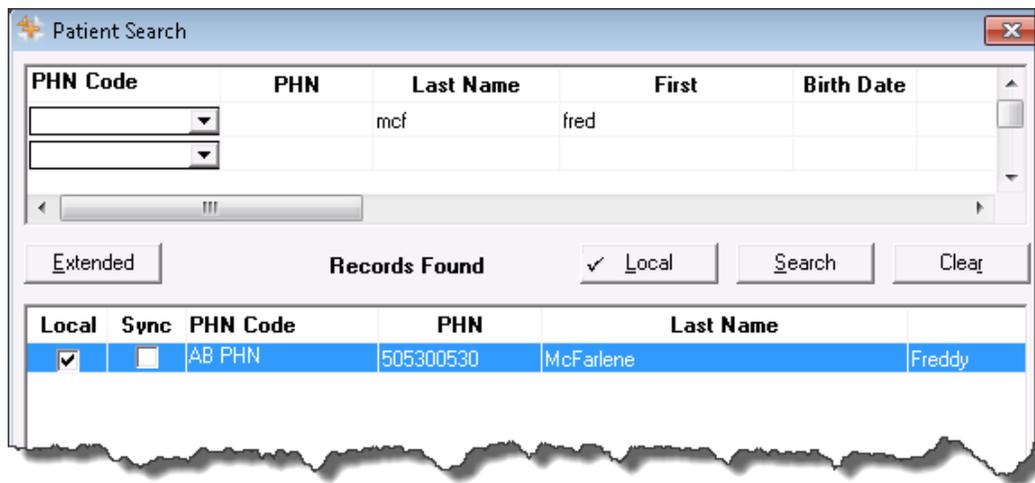
Once the message has been successfully received by the NB DIS, the patient will be saved locally and the patient will be synchronized. The **Synchronized** checkbox will also be selected to indicate that the Patient Folder has been successfully synchronized with the CR.

Scenario 4: Existing PharmaClik Rx Patient / New CR Patient

You will encounter this scenario if the patient is an existing customer at your pharmacy, and is not currently in the Client Registry.

1. Select the **Patient** button. The 'Patient Search' window will open.
2. Enter the search criteria for the patient and select the **Local** button. The search results will display a local, non-synchronized record.

NOTE: The **Sync** checkbox will be deselected for the record, as shown below.



3. Highlight the local patient record and select the **OK** button. The Patient Folder opens.
4. In the main tab, ensure the patient's **PHN** is entered.
5. Select the **PHN Expand**  button. The local information will be used to generate a Client Registry search.
6. When no record is returned, select the **Synchronize** button.

NOTE: If records are returned but do not match the existing patient, deselect the search results and select the **Synchronize** button.

7. Select the **3rd Party** tab.
8. Select a **PHN Code** type from the dropdown list.
9. Ensure the **PHN** field is populated with the patient's PHN.
10. Select the **Save** button.

The **Synchronized** checkbox will also be selected to indicate that the new Patient Folder has been successfully synchronized with the CR.

Correcting Overlays (Synchronizing the Wrong Patient)

An overlay is when you select the wrong patient during the synchronization process. As a result, you overwrite a patient’s information with another patient’s information. In some cases, your pharmacy may not be aware of the overlay until the NB DIS contacts you.

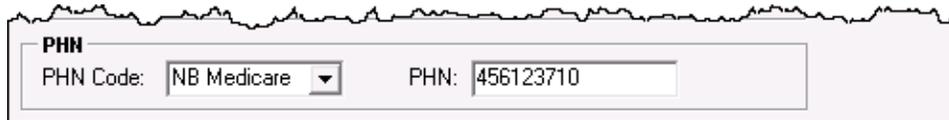
For example, you have Patient A in your pharmacy, but you search and select Patient B from the Client Registry. As a result, you update Patient A’s local information with Patient B’s information. Anything you dispense will now appear on Patient B’s Profile on the Client Registry.

If your pharmacy selects the wrong patient during the synchronization process (overlay), you must update the patient’s demographic information with the correct information and transmit it to the Client Registry.

To correct an overlay, do the following:

1. Update the Patient’s Demographic Information

- a. Open the Patient Folder for the synchronized patient.
- b. In the main tab update all of the basic and demographic information with the correct information for the patient.
- c. Select the **3rd Party** tab and ensure the *PHN Code* and *PHN* are correct.

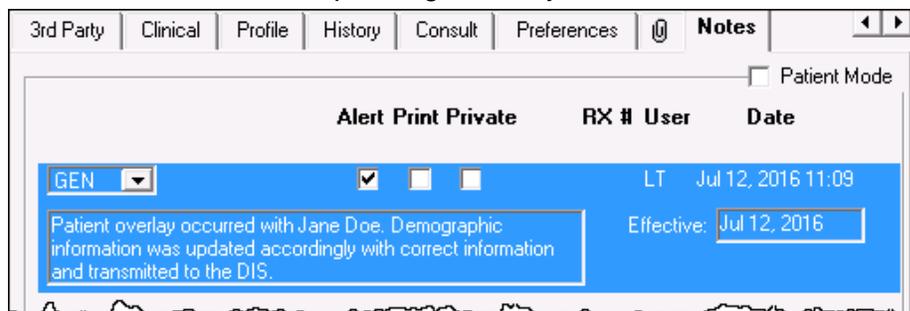


The screenshot shows a form titled "PHN" with two input fields. The first field is labeled "PHN Code:" and has a dropdown menu currently set to "NB Medicare". The second field is labeled "PHN:" and contains the text "456123710".

- d. Select the **Save** button. All of the patient information will be updated and sent to the Client Registry. NB DIS will contact you to follow-up with why the patient information was updated. Ensure you complete Step 2 below.

2. Add Note Indicating Overlay was Resolved

- a. Open the Patient Folder for the synchronized patient (same Patient Folder as above).
- b. Select the **Notes** tab.
- c. Select the **Add** button.
- d. Enter details in regards to the overlay being corrected. This will ensure your pharmacy has an accurate trail for when NB DIS contacts you and for future reference should this come up during the Daily Audit Process.



The screenshot shows the "Notes" tab in a patient folder. The interface includes tabs for "3rd Party", "Clinical", "Profile", "History", "Consult", "Preferences", and "Notes". A "Patient Mode" checkbox is visible. Below the tabs, there are columns for "Alert", "Print", "Private", "RX #", "User", and "Date". A note is displayed with a blue background, containing the text: "Patient overlay occurred with Jane Doe. Demographic information was updated accordingly with correct information and transmitted to the DIS." The note is dated "Jul 12, 2016 11:09" and has an "Effective" date of "Jul 12, 2016".

Patient Folder

Main Tab

Patient Status

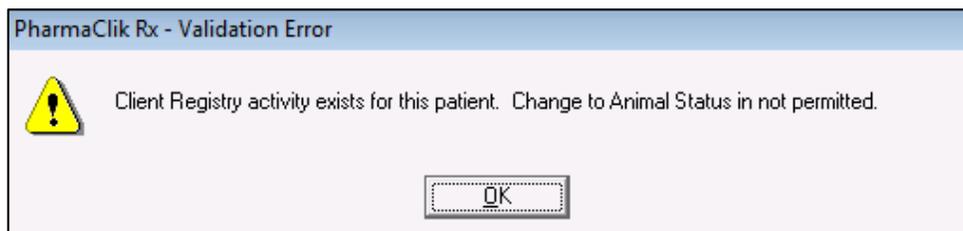
The **Patient Status** is a mandatory field now that you are connected to the DIS. It indicates whether the transactions processed for that patient should be transmitted to the DIS. All transactions for a patient are transmitted to the DIS when the patient status is one of the following:

- Active
- Deceased
- Hospitalized
- Obsolete
- Inactive
- Out of Province

Any transactions for a patient with a status of 'Animal' will not be transmitted to the DIS. The patient status 'Animal' should only be used to indicate that the Patient Folder is for a family pet or a Non-Human location (i.e., Other Pharmacy). When dispensing a prescription for an 'Animal', the RX Detail – Alerts will display the following Alert to the user to ensure the dispensing pharmacist or technician is aware of the patient status:



When the patient status is updated, the change is recorded in the patient's History tab. The status for a patient however, cannot be updated to 'Animal' if Client Registry activity exists for that patient. The following validation prompt will appear:



NOTE: The patient status 'Animal' should not be used to bypass transmitting prescriptions to the DIS. All prescriptions must be transmitted to the DIS and any prescriptions that are not may be monitored or audited. Refer to the [DIS Network Unavailable](#) section for how to manage transactions when the DIS is not available.

Updating Synchronized Patient Information

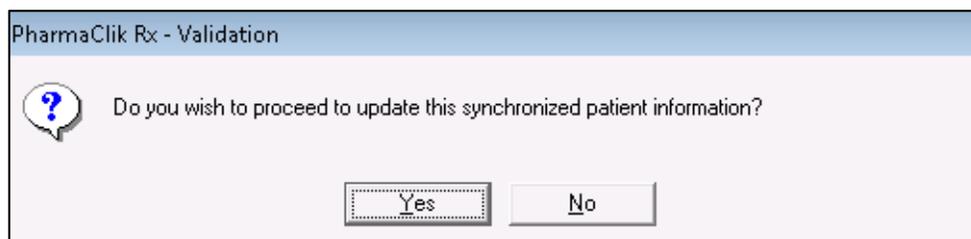
In order to maintain accurate information on the Client Registry, if patient information is updated in PharmaClik Rx, the update will be transmitted to the DIS upon selecting the Save button in the Patient Folder.

When the following fields are updated, the information will automatically be sent to the DIS upon selecting the Save button:

- Addr Line 1
- City
- Province
- Postal Code
- Phone

To prevent a synchronized patient's information from being updated in error, a validation prompt confirming an update will appear when you modify the following fields:

- PHN Code
- First Name
- Last Name
- Middle Name
- Birth Date
- Gender



Patient Compare Button

The Compare button permits a user to compare the patient information in PharmaClik Rx and the patient information on the Client Registry (CR). If any of the information does not match, the user can update local information from information already on file for the patient in the CR.

The Compare window can be invoked from the following 2 locations:

1. **Patient Folder** (for synchronized patients only)
 - In the main tab of a Patient Folder, select the **Compare** button located at the bottom.
 - Use the directional arrows in the 'Compare' window to update information from the CR to PharmaClik Rx, as well as from PharmaClik Rx to the CR.
 - The Compare will not be accessible for patients that are not synchronized.

2. **PHN Expand button**  (for non-synchronized patients only)
 - In the main tab of a Patient Folder, select the **PHN Expand** button. A search to the CR is performed. If a search result is returned that matches, the user must highlight the patient and select the **Compare** button located at the bottom.
 - When the **Compare** button is selected through the **PHN Expand** button, a user can only update information from the CR to their local PharmaClik Rx database.

PharmaClik Rx - Patient Comparison

PharmaClik Rx	EHR
PHN code: NB Medicare	NB Medicare
PHN: M12312231	M12312231
Last Name: SMITH	SMITH
First Name: BOB	BOB
Middle Name: MANY	MANY
Date of Birth: Feb 02, 1976	Feb 02, 1976
Gender: Male	Male
Address: 61 SINGLETON	61 SINGLETON
City: MONCTON	MONCTON
Province: New Brunswick	New Brunswick
Postal Code: E1E 2E2	E1E 2E2
Phone: 9039283749	9039283749

Synchronized Select All

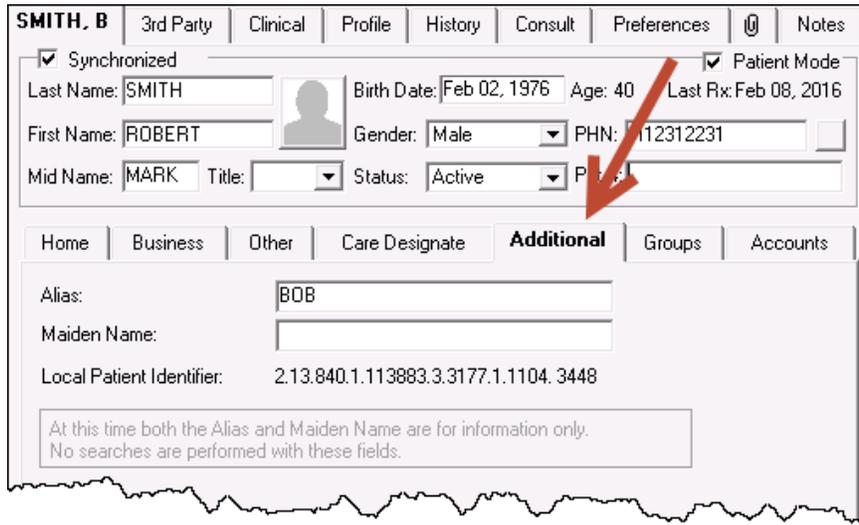
Synchronized:
A checkmark here indicates that the Patient Folder is synchronized with the EHR.

Select All:
Placing a checkmark here will select all fields from PharmaClik Rx to copy over to the CR.

Directional Arrow:
When a field is highlighted, a directional arrow can be selected to update either the local or CR field. You can only update in one direction at a time. When a field is updated, an arrow > will appear next to the field. The direction of the arrow will indicate whether the field was updated from the CR or locally.

Additional Sub-Tab

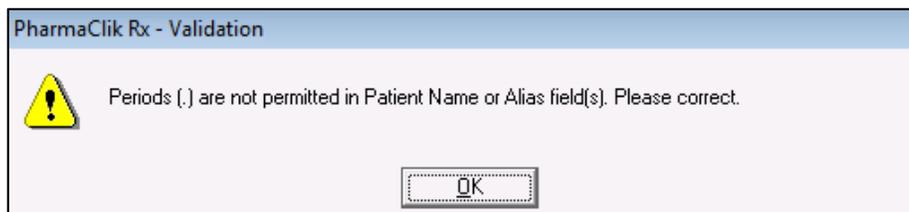
In the main tab of the Patient Folder, a new sub-tab titled *Additional* has been added.



This new tab will contain the following information:

<p>Alias</p>	<p>Use this field to enter any alias names your patient may go by (i.e. patient's first name is <i>Robert</i> but goes by <i>Bob</i>). Although this field is for informational purposes only and will not appear anywhere (i.e. reports, labels, etc.), any information entered will be transmitted to the DIS. Furthermore, no searches will be performed on the Client Registry using this field. If you find a patient on the CR and add them locally, this field will populate with their alias name on the DIS (if an alias exists).</p>
<p>Maiden Name</p>	<p>Use this field to enter a patient's maiden name. This field is for informational purposes only; any information entered in this field will not be transmitted to the DIS and will not appear anywhere (i.e. reports, labels, etc.). Furthermore, no searches will be performed on the Client Registry using this field.</p>
<p>Local Patient Identifier</p>	<p>This field is for informational purposes only. When troubleshooting with the NB DIS Support Team, this number may be required.</p>

You cannot use periods (.) in the Alias field. The following validation prompt will appear if you do:



Patient 3rd Party Tab

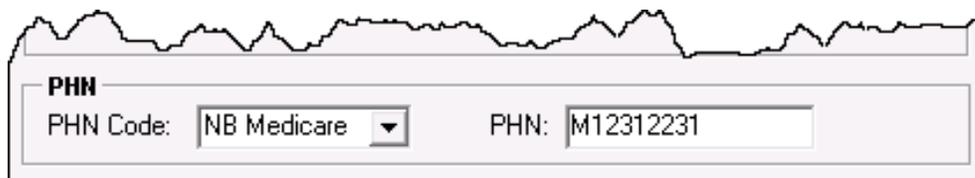
PHN Code

The PHN Code indicates the type of PHN your patient has (i.e. NB Medicare, NS PHN, Other PHN, etc.). This field is mandatory and must be populated before you can save a patient locally in PharmaClik Rx. When a patient is synchronized with the CR, a PHN Code will already be populated for the patient based on their address in the CR.

If required, this field can be modified in PharmaClik Rx (i.e. patient used to live out of province so their PHN Code is *Other PHN*, however, the patient now lives in New Brunswick and has a NB health card, and so it can be modified to *NB Medicare*).

To modify a patient’s PHN Code, do the following:

1. Search for and select your desired patient.
2. Select the **3rd Party** tab.
3. From the **PHN Code** dropdown list, select the appropriate type based on the patient’s health card.



The screenshot shows a form section titled "PHN". It contains two input fields: "PHN Code:" with a dropdown menu currently showing "NB Medicare", and "PHN:" with a text box containing the value "M12312231".

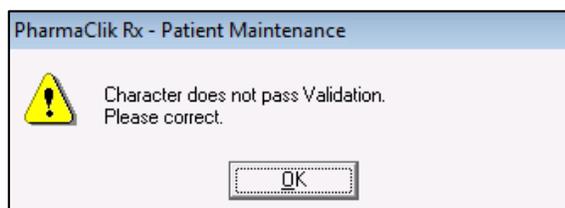
4. Select the **Save** button.

PHN

The Personal Health Number (PHN) is a unique identification number assigned to a resident of a province. In New Brunswick this is called a NB Medicare Health Care Number (HCN), however to maintain consistency, NB Medicare will be referred to as PHN throughout this user guide. When the patient is from outside of NB, their Provincial Identification (PHN Code) and PHN will be used.

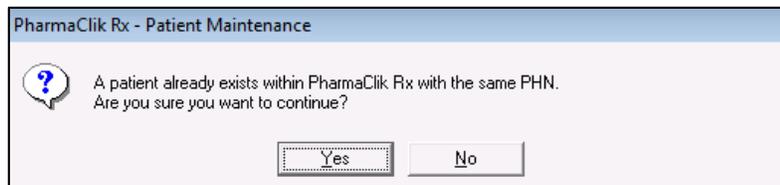
When a patient’s PHN field is entered in the main tab of the Patient Folder, PharmaClik Rx will automatically copy it over to the PHN field in the 3rd Party tab.-Spaces should never be used when entering a patient’s PHN .

The PHN field (in the Main tab and 3rd Party tab) only permits the use of numeric or alphabetic characters. Other characters entered in this field (i.e. periods, hyphens, etc.) will prompt the following validation:



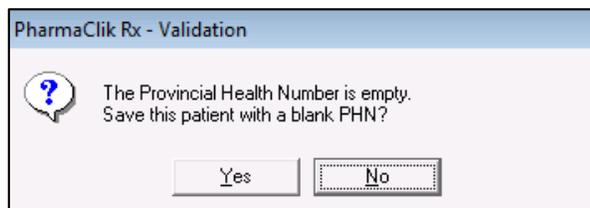
NOTE: The generic PHN 0000000000 will pass validation, but should not be used as it is not a valid PHN.

The PHN is a unique identifier assigned to every patient. If the PHN field (in the Main tab and 3rd Party tab) is populated with a PHN that already exists for another local patient in PharmaClik Rx, the following prompt will appear upon selecting the Save button:

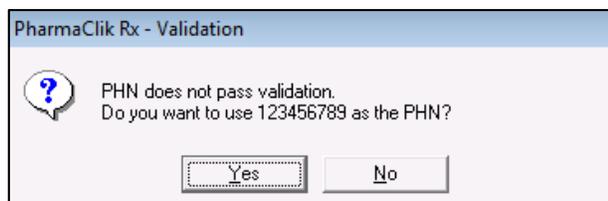


NOTE: The only time a patient with the same PHN is saved locally is when a new born is added using their mother’s PHN. Once the newborn acquires their own PHN, you must update the record.

If the PHN field is left blank, the following prompt will appear upon selecting the Save button:



In New Brunswick, the PHN is 10 digits. If a 10-digit number is not populated in the PHN field, the following prompt will appear upon selecting the Save button:



NOTE: A PHN that is not 10-digits may still be valid (i.e. Out of Province patient, etc.). Ensure to never use SPACES when entering a PHN.

Patient Clinical Tab

The purpose of clinical information is to ensure that related Allergies, Intolerances, and Medical Conditions are kept on file for the patient. This clinical information will not be transmitted to the patient's EHR Profile on the Client Registry, but it is imperative that you keep this information up to date.

Other DIS jurisdictions in Canada provide this information to the DIS and perhaps in the future this information will be shared in New Brunswick.

Patient Profile Tab

A patient's local profile will continue to be displayed by selecting the Profile tab in the Patient Folder. This will display only records that reside locally within PharmaClik Rx. The ability to view a patient's EHR Profile is not provided by the NB DIS. You can view the patient's EHR by viewing the New Brunswick DIS Portal (referred to as the EHR Viewer).

Patient History Tab

A patient's care history lists all events that have occurred for the patient. Events include modifications to the Patient Folder (such as updating demographic information), and prescription activities (such as filling, cancelling, or transferring a prescription). Each time a patient is synchronized with the Client Registry, or an update is completed an entry will be created in the History tab.

For each event, the date, user logged in, type of activity, and comments will be displayed as a new row in the History tab. For example:

- When a patient's demographic information is updated a new row is created with the following details:
 - **Event:** EHR – Patient
 - **Activity:** Update Patient
- When a Patient Compare is performed a new row is created with the following details:
 - **Event:** EHR – Patient
 - **Activity:** Compare Patient
- When a prescription is dispensed, a new row is created with the following details:
 - **Event:** Rx
 - **Activity:** Dispensed

SMITH, B 3rd Party Clinical Profile History Consult Preferences @ Notes						
Entered	User	Event	Activity	Comments	Private	
Feb 21, 2016 20:50	CRP	EHR - Patient	Compare Patie	Patient Compare performed	<input type="checkbox"/>	
Feb 08, 2016 10:14	BA2	Refill Rx	Dispensed	WARFARIN SODIUM;APO-WARF	<input type="checkbox"/>	
Feb 08, 2016 10:14	BA2	Rx	Interaction	DRUG-DRUG:WARFARIN SODIL	<input type="checkbox"/>	
Feb 08, 2016 10:14	BA2	Rx	Interaction	DRUG-MEDICAL:WARFARIN SOI	<input type="checkbox"/>	
Feb 08, 2016 10:14	BA2	Rx	Interaction	DUPLICATE INGREDIENT:WARF	<input type="checkbox"/>	

For each event that is recorded in the History tab, such as an interaction or dispense, you can select **Rx > Detail** to view more information about what occurred in the event. Furthermore, the user has the ability to **Sort** and **Filter** the entries in the History tab.



Patient Consult Tab

The Patient Consult tab is available in all provinces. A number of consultation types can be added in the Consult tab. Any service provided under this tab will be saved locally only and will not be transmitted to the patient's EHR profile on the Client Registry.

Patient Notes Tab

At this time any notes added in the patient's Notes tab will not be transmitted to a patient's EHR. This information is local only.

Doctor Folder

The Doctor Folder permits the addition of a new health professional or an update of an existing health professional. The Folder is called Doctor, but Nurse practitioners, Pharmacists, Optometrists, and all other health professionals are also entered. There have been enhancements to the Doctor Folder with the addition of new fields to accommodate various categories of health care professionals for eHealth. Your pharmacy can also view all prescriber information on the EHR Viewer.

Role Type

The **Role Type** is a mandatory field for DIS transactions. It further defines the Prescriber Type (i.e. *Prescriber Type* of New Brunswick Dental Association would have a *Role Type* of Dentist). Upon DIS activation this field will be automatically populated based on the Prescriber Type.

SMITH, BRIAN		History	@	Notes
Last Name: SMITH	ReAuth Method: Phone	Doctor #: 1	Nar Res:	
First Name: BRIAN	Prescriber Type: New Brunswick	License #: 99999		
Mid Name:	Role Type: Dentist	TP Lic#:		
Language: English	NB Type: In-Province Dentist	Status: Active		

NB Type

The **NB Type** is a mandatory field for DIS transactions. This field is used to identify prescribers that may be different (i.e. In-Province Dentist versus an Out-of-Province Dentist). Upon DIS activation this field will be automatically populated based on the Prescriber Type. In certain instances, users may be required to use default NB Type and License # (i.e. out of province provider, etc.). For more information, refer to the [Using Default Providers](#) section.

SMITH, BRIAN		History	@	Notes
Last Name: SMITH	ReAuth Method: Phone	Doctor #: 1	Nar Res:	
First Name: BRIAN	Prescriber Type: New Brunswick	License #: 99999		
Mid Name:	Role Type: Dentist	TP Lic#:		
Language: English	NB Type: In-Province Dentist	Status: Active		

TP Lic#

The **TP Lic#** is a new field that can be used in instances where the New Brunswick DIS accepts a different license # for a doctor than the license # that third parties accept. In New Brunswick all claims must be submitted to the DIS using the license number issued by the College of Physicians, however for claim adjudication third parties will only accept the New Brunswick Prescription Drug Program license #. As such, your fields will be populated as shown below:

- **License #:** License number issued by the College of Physicians
- **TP Lic#:** License number issued by New Brunswick Prescription Drug Program

If the **TP Lic#** field is populated, the # entered in this field will be sent to third parties, while the # entered in the **License** field will be sent to the DIS. This field is not mandatory for DIS transactions; it should only be used when it has been confirmed that the DIS accepts a different license # than a third party.

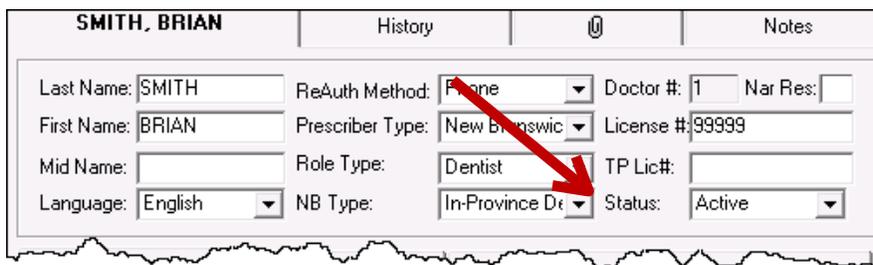


The screenshot shows a form for a doctor named SMITH, BRIAN. The form includes fields for Last Name, First Name, Mid Name, Language, ReAuth Method, Prescriber Type, Role Type, NB Type, Doctor #, License #, TP Lic#, and Status. A red arrow points to the TP Lic# field, which is currently empty.

Status

The **Status** field is a new dropdown list that has been added to the Doctor Folder. This field indicates the prescriber's current status on the DIS. The dropdown list will consist of the following options:

- Active
- Suspended
- Terminated



The screenshot shows the same form as above, but with a red arrow pointing to the Status field, which is currently set to 'Active'.

Users are only able to transmit claims to the DIS with a prescriber that has a status of 'Active'. Upon DIS activation this field will be automatically populated based on the Prescriber Type. If the prescriber status is not 'Active', PharmaClik Rx will return the following Detected Issue notifying the user:

Priority	Severity	Issue Type	Description
Error	High	Business Constraint Violation: A local business rule relating multiple elements has been violated.	PRESCRIBER NOT AUTHORIZED TO PRESCRIBE

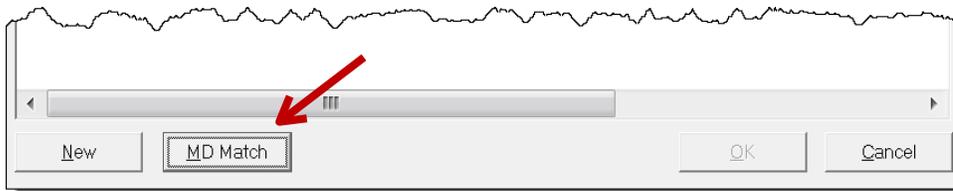
Using MD Match

When adding new doctors to your Doctor File, you can search a provincial database of doctors by selecting the **MD Match** button in the 'Doctor Search' window.

NOTE: This MD Match function will be useful for when the prescriber is not known to your pharmacy and you cannot make out the signature but you can identify the License #. You can perform a search using the License # field. You can use the wildcard search option by using %.

To use MD Match to find a doctor, do the following:

1. Select the **Doctor** button. The 'Doctor Search' window appears.
2. Enter in the doctor search criteria.
3. Select the **Search** button.
4. If the doctor is not found, select the **MD Match** button at the bottom of the screen.



5. The 'Master Doctor Search' window opens with the search criterion displayed. Select the **Search** button.
6. Highlight the correct doctor from the returned search results.



7. Select the **OK** button. The Doctor Folder opens.
8. If required, update the doctor's information locally within PharmaClik Rx including **Role Type**, **Role Status**, and **Address** fields.
9. Select the **Save** button.

Using Default Providers

In instances where you have exhausted all search options for a provider, including using MD Match, and cannot find the provider, you can use a default provider to transmit claims to the DIS. Use of default providers will be monitored by the NB DIS. Ensure that a default provider is only used as a last resort when the provider cannot be found.

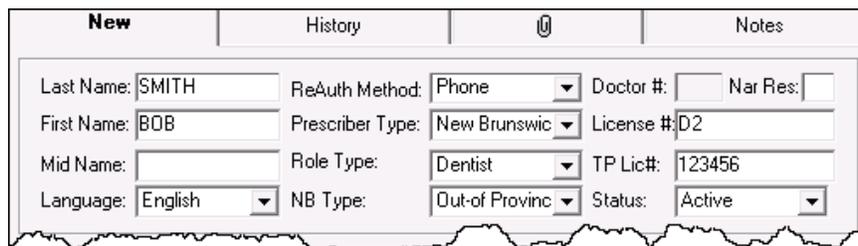
To use a default provider, do the following:

1. Exhaust all search options to ensure that the provider does not exist.
2. Select the **New** button in the 'Doctor Master Search' window to create a new Doctor Folder for the provider.
3. Update all necessary information in the Doctor Folder with the provider's correct information (i.e. name, address, phone number, etc.)
4. Using the chart below, set the following fields:
 - Prescriber Type
 - NB Type
 - Role Type
 - License #

NOTE: The # entered in the **License #** will be sent to the New Brunswick DIS while the # entered in the **TP Lic#** field will be used for claim adjudication.

License #	Provider Type	NB Type
D1	Dentist	In-Province Dentist
D2	Dentist	Out-of-Province Dentist
D3	Medical Doctor	In-Province Medical Doctor
D4	Medical Doctor	Out-of-Province Medical Doctor
D5	Pharmacist	In-Province Pharmacist
D6	Pharmacist	Out-of-Province Pharmacist
D7	Registered Nurse Practitioner	In-Prov. Reg. Nurse Pract.
D8	Registered Nurse Practitioner	Out-of-Prov. Reg. Nurse Pract.
D9	Optometrist	In-Province Optometrist
D10	Optometrist	Out-of-Province Optometrist
D999	Other Provider	Out-of-Province Other Provider

5. Select the **Save** button. You are now able to fill a prescription, as per normal process, using this provider. The Doctor Folder will appear similar to the following:



The screenshot shows a 'New' form with the following fields and values:

- Last Name: SMITH
- First Name: BOB
- Mid Name: (empty)
- Language: English
- ReAuth Method: Phone
- Prescriber Type: New Brunswic
- Role Type: Dentist
- NB Type: Out-of Provinc
- Doctor #: (empty)
- License #: D2
- TP Lic#: 123456
- Status: Active

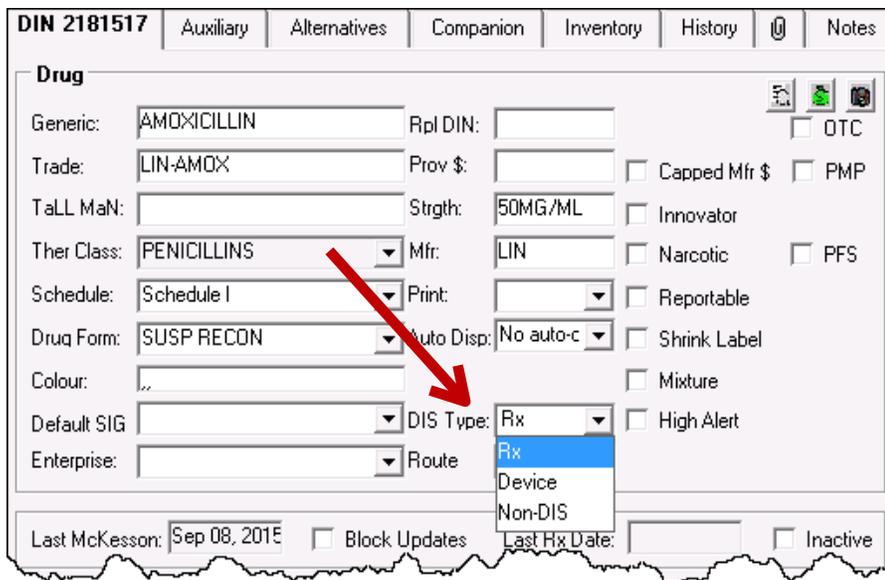
Drug Folder

With DIS Activation, the Drug Folder has been modified with the addition of new fields.

DIS Type

The **DIS Type** selection determines if the drug will be submitted using the prescription message to the DIS. Both Device and Non-DIS types are not transmitted to the DIS. Upon DIS Activation, PharmaClik Rx has made every attempt to set the DIS Type accordingly for all drugs. The **DIS Type** is a dropdown list located in the main tab of the Drug and Mixture Folders and consists of the following options:

- **Rx** Prescription messages will be used (for all DINs and PINs)
- **Device** Prescriptions for this type will not be transmitted to the DIS
- **Non-DIS** Prescriptions for this type will not be transmitted to the DIS.



The screenshot shows a 'Drug' form for 'AMOXICILLIN' (DIN 2181517). The 'DIS Type' dropdown menu is open, showing 'Rx' as the selected option. Other fields include 'Generic: AMOXICILLIN', 'Trade: LIN-AMOX', 'Strength: 50MG/ML', 'Mfr: LIN', and 'Schedule: Schedule I'. The 'DIS Type' dropdown is currently set to 'Rx'.

The *DIS Type* of '**Rx**' must only be used when dispensing a drug with a valid DIN or PIN.

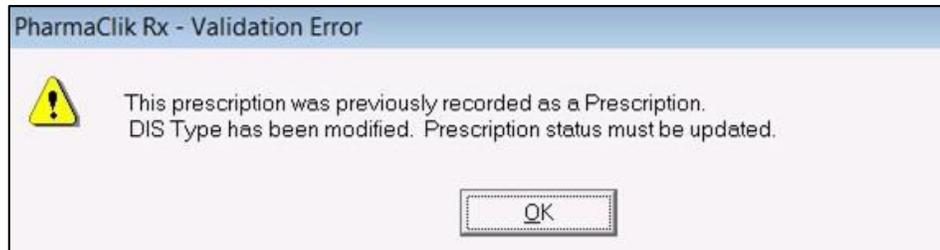
The *DIS Type* of '**Device**' must only be used when dispensing a device. Device prescriptions are not transmitted to the DIS, but will appear locally in PharmaClik Rx.

The *DIS Type* of '**Non - DIS**' must only be used when you need to add a treatment that should not be transmitted to the DIS (i.e. for a long term care patient adding a treatment of *beer with dinner* or *restrained at night*.) This treatment will not get transmitted to the DIS, but will appear on your Medication Administration Report (MAR).

The History tab will record when the **DIS Type** have changed. The date entered, user and event will also be recorded for reference.

Modifying the DIS Type on Refill

Once a prescription is submitted to the DIS, you cannot modify the DIS Type. If you attempt to change the DIS Type while refilling, you will be presented with the following validation prompt:



To resolve this, you must discontinue the prescription, and then create a new prescription with the appropriate DIS Type.

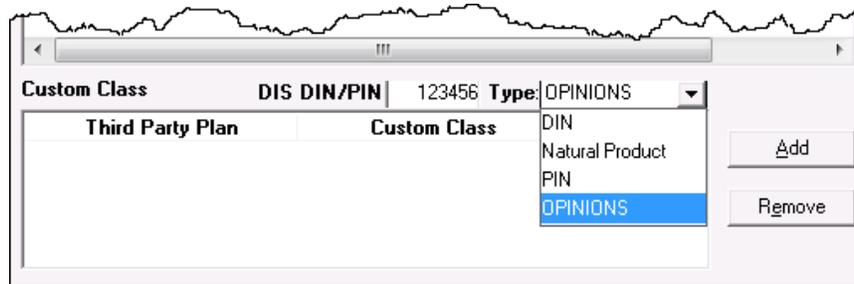
If a prescription was dispensed with a DIS Type of either Device or Non-DIS, you can modify the DIS Type as the prescription would not have been transmitted to the DIS (Device and Non-DIS are local only).

Route

The Route field is a new field found in all Drug and Mixture Folders, however this field is only editable for mixtures. The route will be automatically set for all drugs upon DIS Activation; no further action is required by users.

DIS DIN/PIN and Type

The **DIS DIN/PIN** and **Type** fields are located in the Alternatives tab of a Drug Folder and provide a means to submit an alternative DIN/PIN to the DIS. For drugs with a **DIS Type** of 'Device', these two fields must be populated and the **Type** must be set to OPINIONS.



The **Type** field dropdown will consist of the following:

- **DIN** Used when the DIS Type is Rx and the product has a valid DIN.
- **PIN** Not used in New Brunswick DIS.
- **Natural Product** Used when the DIS Type is Rx and the product has a valid NPN.
- **OPINIONS** Used when the DIS Type is Device. Devices are not submitted to the New Brunswick DIS.

To add or update the **DIS DIN/PIN** and **Type** fields, do the following:

1. Search and select the desired drug.
2. Select the **Alternatives** tab.
3. In the **DIS DIN/PIN** field, enter the DIN/PIN for the product.
4. Select the corresponding type from the **DIS Type** dropdown list (i.e. DIN, Natural Product, PIN, OPINIONS).
5. Select the **Save** button.

The History tab will record when the **DIS DIN/PIN** or **Type** have changed. The date entered, user and event will also be recorded for reference.

The New Brunswick DIS only accepts claims with the Type of either DIN or Natural Product. If you attempt to fill a prescription for a drug with the **DIS Type** of Rx and an incorrect **Type** of either OPINIONS or PIN, the following prompt will appear:

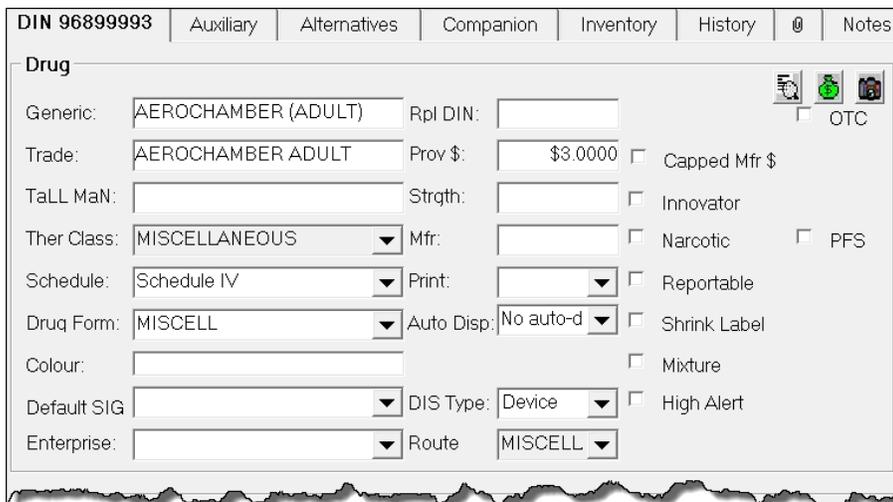


Setting Up a Drug as a Device

The **DIS Type** selection in the main tab of the Drug Folder determines if the drug will be submitted to the DIS. In the province of New Brunswick all Devices **must** be recorded with a Type of OPINIONS. For more information, see the [DIS DIN/PIN and Type](#) section.

To set up a new drug as a device, do the following:

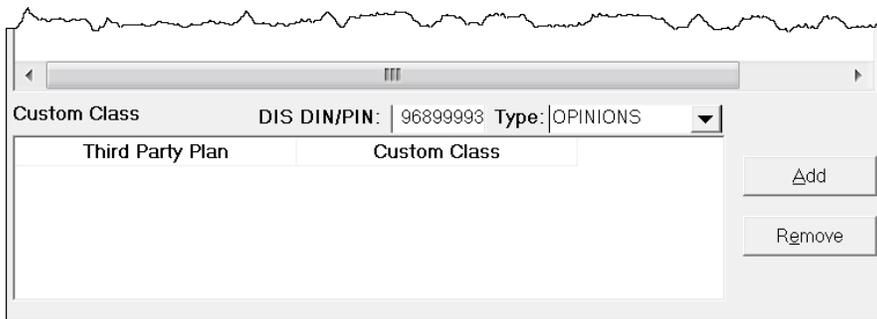
1. Select the **Drug** button.
2. Search for the device you wish to dispense. The search results will indicate *No Records Found*.
3. Select the **New** button. A new Drug Folder will open.
4. Enter in as many details as possible regarding the device you wish to dispense.
5. From the **DIS Type** dropdown list, select Device.



The screenshot shows a 'Drug' form with the following fields and values:

- DIN: 96899993
- Generic: AEROCHAMBER (ADULT)
- Trade: AEROCHAMBER ADULT
- Ther Class: MISCELLANEOUS
- Schedule: Schedule IV
- Drug Form: MISCELL
- DIS Type: Device
- Other fields include Rpl DIN, Prov \$ (\$3.0000), Strgth, Mfr, Print, Auto Disp (No auto-d), Colour, Default SIG, Enterprise, Route (MISCELL), and checkboxes for OTC, Capped Mfr \$, Innovator, Narcotic, PFS, Reportable, Shrink Label, Mixture, and High Alert.

6. Select the **Alternatives** tab.
7. In the **DIS DIN/PIN** field, enter the DIN/PIN of the device.



The screenshot shows the 'Alternatives' tab with the following details:

- DIS DIN/PIN: 96899993
- Type: OPINIONS
- Table with columns: Third Party Plan, Custom Class
- Buttons: Add, Remove

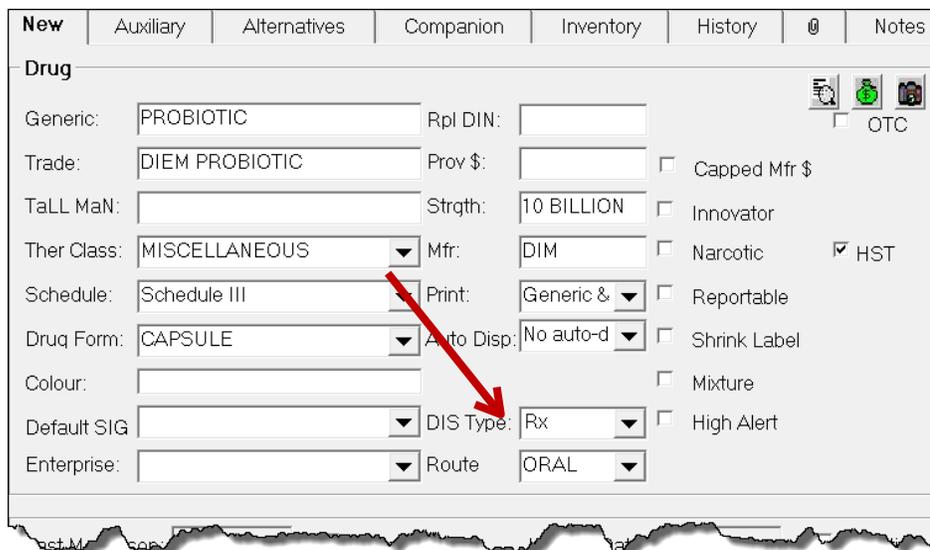
8. From the **Type** dropdown list select OPINIONS.
9. Enter in any other details regarding the device.
10. Select the **Save** button.

Setting Up a Drug as a Natural Product

At your pharmacy you may encounter a patient that requests you to carry a natural product that their health insurance provider will pay for if they submit it manually with a prescription receipt. A number of natural health products already exist in PharmaClik Rx, however when dispensing them you must clearly identify that it is a natural product by following the steps outlined below.

To set up a new drug with a NPN, do the following:

1. Select the **Drug** button.
2. Search for the natural product you wish to dispense.
 - If the drug already exists in PharmaClik Rx, select the drug and skip to **Step C**.
 - If the drug does not exist in PharmaClik Rx, do the following:
 - a. From the 'Drug Search' window, select the **New** button. A new Drug Folder will open.
 - b. Enter in as many details as possible regarding the natural product you wish to dispense.
 - c. From the main tan, from the **DIS Type** dropdown list, select Rx.



The screenshot shows the 'New Drug' form with the following fields and values:

- Generic: PROBIOTIC
- Trade: DIEM PROBIOTIC
- TaLL MaN: (empty)
- Ther Class: MISCELLANEOUS
- Schedule: Schedule III
- Drug Form: CAPSULE
- Colour: (empty)
- Default SIG: (empty)
- Enterprise: (empty)
- Rpl DIN: (empty)
- Prov \$: (empty)
- Strgth: 10 BILLION
- Mfr: DIM
- Print: Generic &
- Auto Disp: No auto-d
- DIS Type: Rx (indicated by a red arrow)
- Route: ORAL

Checkboxes on the right include: OTC, Capped Mfr \$, Innovator, Narcotic, HST, Reportable, Shrink Label, Mixture, and High Alert.

- d. Select the **Alternatives** tab.
- e. In the **DIS DIN/PIN** field, enter the DIN of the Natural Product
- f. From the **Type** dropdown list select Natural Product.



The screenshot shows the 'Alternatives' tab with the following fields and values:

- Custom Class: (empty)
- DIS DIN/PIN: 58203874
- Type: Natural Product

Buttons for 'Add' and 'Remove' are visible on the right side of the form.

- g. Enter in any other details regarding the product.
- h. If you are billing to a Third Party that recognizes the product with a different PIN, select the **TP Rules** button. If not, skip to **Step L**.
- i. Select the **Add** button. A new row appears.
- j. Enter in all the details for the specific Third Party plan, including the PIN that the specific Third Party accepts for that product.
- k. Select the **OK** button.
- l. Select the **Save** button.

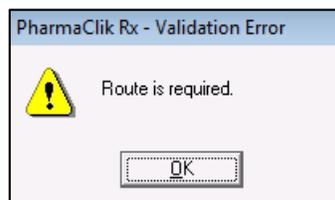
Mixture Folder

With DIS Activation, mixtures must be clearly identified by the Generic Name description as this is the field that will be transmitted to the DIS and be viewed by other health professionals when they are looking at a patient's EHR.

It is imperative to ensure all ingredients listed as part of a mixture are clearly identified and, if required, the DIS DIN/PIN is added for the ingredients.

Route

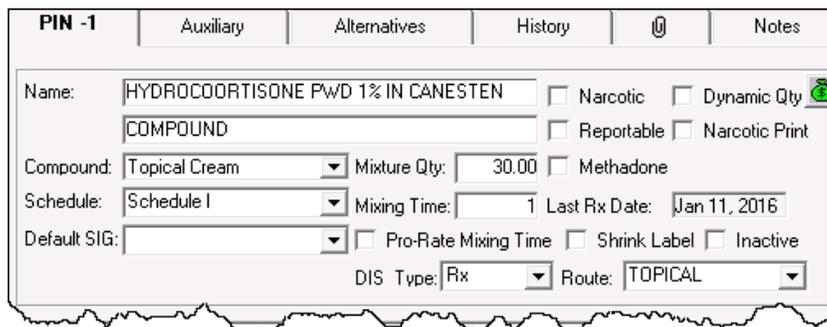
The Route is located in the main tab of the Mixture Folder and will be editable for mixtures only. A prescription's Route of Administration (Route) will be transmitted within the DIS prescription message. This field is mandatory for all mixtures. If left blank, the following prompt will appear when filling a prescription for the mixture:



To modify the Route from the Mixture Folder, do the following:

1. Search for and select the desired mixture, or create a new mixture.
2. In the main tab of the Mixture Folder, locate the **Route** dropdown menu and select a value that is appropriate for the mixture (i.e. Topical).

NOTE: When creating mixtures, do not use the Route MISCELLANEOUS as this Route will not be accepted by the New Brunswick DIS.



The screenshot shows a form for a mixture with the following fields and values:

- PIN -1** (tab)
- Name:** HYDROCORTISONE PWD 1% IN CANESTEN COMPOUND
- Compound:** Topical Cream
- Mixture Qty:** 30.00
- Schedule:** Schedule I
- Mixing Time:** 1
- Last Rx Date:** Jan 11, 2016
- Default SIG:** (empty)
- DIS Type:** Rx
- Route:** TOPICAL

3. Ensure that the **DIS Type** field is populated correctly. For more information, refer to the [DIS Type](#) section.
4. Ensure the **DIS DIN/PIN** value and **Type** are populated correctly in the ingredient Drug Folders. For more information, refer to the [DIS DIN/PIN and Type](#) section.
5. Select the **Save** button.

Submitting Mixtures to the Prescription Monitoring Program

With DIS integration, compounds that are transmitted to the DIS must be identified with a Prescription Monitoring Program (PMP) DIS DIN. The following list will be used when an ingredient in the recipe does not already have a proper DIN (i.e., a chemical supplied by PCCA, Wiler, Holista etc).

Drug	NB DIS DIN
Monitored drug ingredient <ul style="list-style-type: none"> • When the drug originates from a supplier without a DIN or PIN (i.e. Wiler, PCCA, etc). • For example: fentanyl, codeine, testosterone, etc. 	08881000
Active non-monitored drug ingredient\ <ul style="list-style-type: none"> • Any scheduled drug other than a monitored drug coming from a supplier which does not have a DIN (i.e. NPN or PIN). • For example: sulfur, salicylic acid, menthol, etc. 	08881001
Non-active/non-monitored drug ingredient <ul style="list-style-type: none"> • Creams, bases, diluents, suspending vehicles that do not have a DIN or NPN. 	08881002

NOTE: If the monitored mixture/compound ingredient has a DIN, the DIN is to be transmitted. If the ingredient was created as a freeform drug, the DIN must be entered in the DIS DIN/PIN field of the Drug Folder Alternatives tab. The DIN must be used with the DIS DIN PIN type of DIN to be accepted by the DIS.

To enter this DIN in an ingredient Drug Folder, do the following:

1. Search for and select the ingredient Drug Folder.
2. Select the **Alternatives** tab.
3. Use the chart above to determine which DIN to use.
4. Ensure the **DIS Type** is set to DIN.
5. In the **DIS DIN/PIN** field, enter the DIN from the chart above.
6. Select the **Save** button. You can now submit a prescription to the DIS for the mixture.

Filling a Prescription

All prescriptions **must** be submitted to the patient's EHR Profile on the Client Registry before it can be submitted online to third party payers for payment. The DIS will capture all prescriptions, including cash prescriptions. Prescriptions for Animals, however, will not be transmitted to the DIS.

When a paper prescription is transcribed and filled, PharmaClik Rx will transmit the 'Dispense Prescription' message to the DIS. This will update the prescription on the patient's EHR Profile with the dispense information.

When a prescription is dispensed, the pharmacist that is logged into PharmaClik Rx will always be transmitted to the DIS. If the If another pharmacist is dispensing the prescription, you must do one of the following:

- Log out of PharmaClik Rx and log in as the dispensing pharmacist; or,
- Open the incomplete Rx in **Rx Detail > EHR tab** select the correct initials from the **Pharmacist** field.

NOTE: Changing the pharmacist initials from **Rx Detail > Main tab** will not change the pharmacist transmitted to the DIS. You must change the initials from the EHR tab.

Placing Prescriptions on Hold

When a paper prescription is transcribed and put on hold for a patient, PharmaClik Rx will not transmit the prescription to the patient's EHR Profile on the Client Registry. The prescription will only be placed on hold locally in PharmaClik Rx.

When the prescription that is placed on hold is ready to be dispensed, the **Written Date** for the prescription is transmitted to the DIS.

The prescription will be transmitted to the DIS, however, the *Dispense* details will only be transmitted once the prescription is filled. The *Create* section will display the Rx ID of the prescription on Hold, as shown in the example below.

The Patient's Profile will continue to show the prescription with the status of **Hold**.

Rx 502571; Mckess: ▼ Auth: 502571 (Jan 29, 2015) Fill:
Hold: Jan 29, 2015

Rx: 502571
Extended
EHR
Third Party
Notes

Patient: Authoritative Defer EHR [Help Desk](#)

Create

Rx ID:	<input type="text" value="11732"/>	No Sub:	▼
GCN/DIN/PIN:	<input type="text" value="2401495"/>	Treatment Type:	▼
Prev. Rx ID:	<input type="text" value="11658"/>	Result:	<input type="text" value="Accepted"/>
Orderable Form:	Capsule ▼	0 Detected Issue(s):	

Dispense Refusal to Fill

DIS ID:	<input type="text"/>	Fill Type:	FF - First Fill ▼
DIN/PIN:	<input type="text" value="2401495"/>	Sub Reason:	▼
Pharmacist:	JS ▼	Sub Code:	▼
		Result:	<input type="text"/>
		0 Detected Issue(s):	

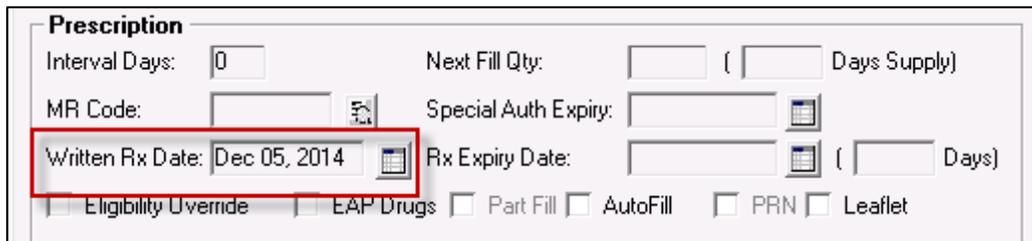
Pickup

Workflow Status:	<input type="text"/>	Result:	<input type="text"/>
<input type="checkbox"/> EHR		0 Detected Issue(s):	

Using the Set Fill Date Function

The **Set Fill Date** function allows you to enter a Fill Date of the actual dispense that is different from the current system date. This overrides the current system date, providing the ability to backdate prescriptions. The modified Fill Date is transmitted with the online claim and is used as the prescription's Fill Date during adjudication. This Set Fill Date is also recorded on the patient's EHR.

When the **Set Fill Date** function is used for a new prescription or a new authorization, the *Written Rx Date* in the Extended Tab of Rx Detail is updated with the same date. If the Written Rx Date of a prescription is not the same day the pharmacy is dispensing the Rx, the user is able to record the correct written date on the Extended Tab of Rx Detail.



The screenshot shows a 'Prescription' form with the following fields and options:

- Interval Days: 0
- Next Fill Qty: () Days Supply
- MR Code: ()
- Special Auth Expiry: ()
- Written Rx Date: Dec 05, 2014** (highlighted with a red box)
- Rx Expiry Date: () Days
- Eligibility Override
- EAP Drugs
- Part Fill
- AutoFill
- PRN
- Leaflet

To use Set Fill Date function, do the following:

1. Open the incomplete prescription in RX Detail.
2. Select the **Rx > Set Fill Date**. The 'Set Fill Date' window opens.
3. Enter a date that is before today's date.
4. Select the **OK** button.
5. Continue to fill the prescription as usual.

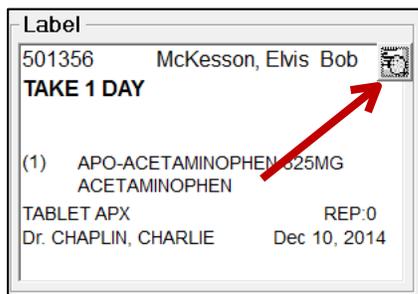
Once the prescription has been filled, the Fill Date cannot be modified. The *Fill Date* shown in the patient's Profile and Audit History will reflect the Fill Date used for the prescription. The *Performed On Date* reflects the system date on which the prescription was filled.

Entering Route of Administration for a Prescription

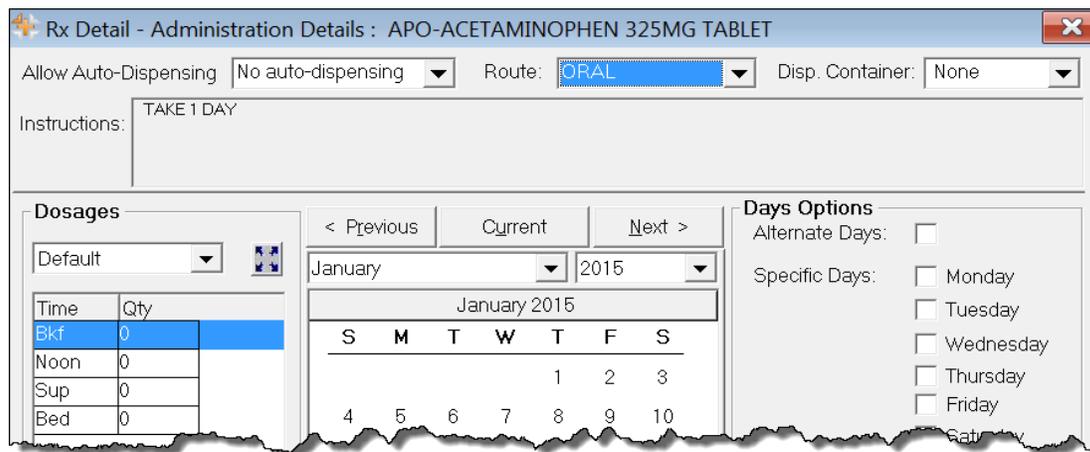
Both the Drug Form and Route of Administration (Route) is a mandatory field for all drug or mixture prescriptions. PharmaClik Rx will populate the **Administration Details > Route** field based on the Route information within the Drug or Mixture Folder. If the Route is blank, you will be required to select a value.

To enter a Route for a prescription, do the following:

1. Open the incomplete prescription in RX Detail.
2. Select the magnifying glass located in the Label section (or in the Group, Blister or Dosett section for non-retail prescriptions). The 'Administration Details' window opens.



3. Select an option from the **Route** dropdown menu.



4. Select the **OK** button.
5. Continue to fill the prescription as usual.



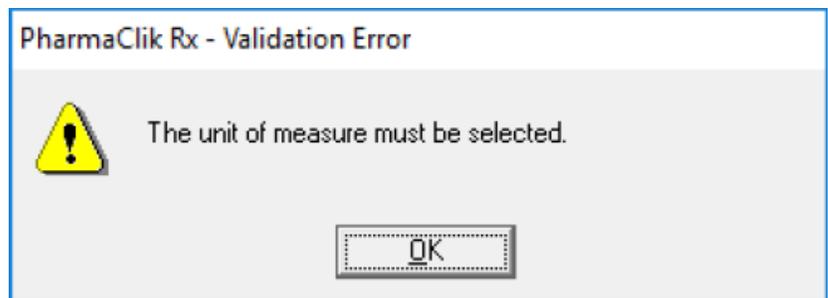
The Prescription Route list is a more comprehensive list than the Drug/Mixture Route list. Drug/Mixture Routes of Injection or Miscellaneous cannot be mapped to a prescription Route and will always require manual intervention.

Unit of Measure Requirement

When filling a prescription for a mixture, the unit of measure (UOM) is required in the **Rx Detail** window.

MACDONALD, SANDY; Sulfamethoxazole 40 mg/mL Trimethoprim 8 mg/mL Oral Liquid ▾						1 Detailed
Auth: 0		Fill:		Last Fill:		
Rx: New	Extended	EHR	Third Party	Package	Notes	
MACDONALD, SANDY TP Bill: CA Phone: (506) 123-9338 Age: 91 <input type="checkbox"/> Allergy <input type="checkbox"/> Medical		Prescription QA: <input type="text" value="30"/> QD: <input type="text" value="0"/> Qty: <input type="text" value="30"/> SIG: <input type="text" value="USE UD"/> DS: <input type="text" value="10"/> Bill: <input type="text" value="CA"/> VAW: <input type="checkbox"/> User: <input type="text" value="QA"/> Unit: <input type="text"/>		Price <input type="checkbox"/> Capitation Cost: \$1.55 Markup: \$0.47 Fee: \$78.75 Total: \$80.77 Tp Paid: \$0.00		
Dr. test, Doctor Lic: 11100						

If a unit of measure is not selected when filling the prescription, the following prompt displays.



Reauthorizing a Prescription

As a DIS-enabled pharmacy, your store will have the ability to reauthorize prescriptions that exist on a patient's EHR Profile of the following type:

- First Fill Prescriptions
- Refill Prescriptions
- Prescriptions older than Rx Life (365 Days)

Reauthorizing Prescriptions with Refills Remaining

A prescription's audit history lists the refill history for the prescription, including the original prescription and any subsequent refills and reauthorizations. When refilling a prescription, the patient's prescription's audit history and/or EHR should be verified to determine when the prescription was last filled.

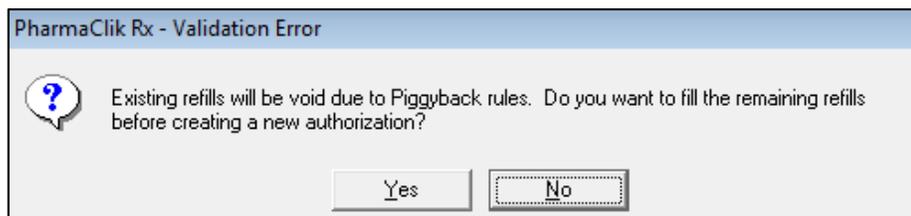
If the patient has refills remaining for a drug that was previously dispensed, you must remove the existing refills and then refill this prescription, in order to maintain an accurate Audit History. PharmaClik Rx will automatically create a new authorization number for the new prescription.

To create a new authorization from an existing prescription, do the following:

1. Search for and select the desired patient.
2. Locate the prescription that has refills remaining from the patient's **Profile** tab.
3. Highlight the prescription and select the **Refill** button. The prescription will open in Rx Detail.
4. Enter **0** in the QA field and select the **Tab** button (on your keyboard) or click any other field on the main tab.

NOTE: The QA field will already be prepopulated based on the quantity authorized for the prescription you selected to refill.

5. The prompt displayed below will appear. Select the **No** button.



6. Continue filling the prescription as per the new prescription provided to the patient.
7. Select the **Fill** button.

This process will link the previous Rx DIS ID with the new prescription presented today. The Patient Audit History will clearly demonstrate the workflow process for this new authorization.

Reauthorizing Prescriptions Older than Rx Life

To create a new authorization from an existing prescription that is older than 365 days, do the following:

1. Search for and select the desired patient.
2. Locate the prescription that has refills remaining from the patient's **Profile** tab.
3. Highlight the prescription and select the **Refill** button.
4. A prompt will appear indicating: *"The Rx is older than Rx Life. Do you wish to continue?"* Select the **Yes** button.
5. The prescription will open in Rx Detail with the QA set to 0. Continue filling the prescription as per the new prescription provided to the patient.

Reauthorizing Deferred Prescriptions

Prior to reauthorizing a deferred prescription, it is recommended that all deferred prescriptions for that patient be resolved from the DIS Queue.

When the **Defer EHR** checkbox is selected for a previous prescription(s), reauthorized prescriptions will also have the **Defer EHR** checkbox turned ON until the previous record is successfully submitted to the DIS. Therefore when the user attempts to reauthorize a prescription that has 1 or more associated transaction(s) to the current prescription in the *DIS Queue*, they will be prohibited from doing so.

Once submitted, the reauthorized prescription will be flagged as **Deferred** and the related DIS transaction(s) for the prescription will be added to the **DIS Queue** tab on the Workbench when the user selects the **Hold**, **Queue**, or **Fill** button. The DIS Queue status for all related DIS transactions will be set to **Deferred** until the user sends the transaction(s) to the DIS.

Changing the Doctor When Reauthorizing a Prescription

Pharmacies now have the ability to change the prescriber when reauthorizing a prescription with existing refills remaining. Changing the prescriber will only be permitted if the prescription indicates it is a ReAuth, as shown below.

Rx 500412; Mckess ▾	Auth:0 (Feb 22, 2016)	Fill:	Last Fill: Feb 22, 2016 (1 days)
Rx: ReAuth	Extended	EHR	Third Party
			Notes

NOTE: If the doctor is changed on a reauthorized prescription, the QA field will automatically default to 0.

Updating a Prescription Status

It is important that the status of a patient’s prescription is accurate and up to date. When the status of the prescription is changed to **Discontinue**, an abort message will be transmitted to the DIS. When the status of a prescription is changed to **Inactivate** or **Suspend**, the status change is local only and does not get transmitted to the DIS. The prescription will remain Active on the Patient’s EHR profile.

NOTE: Currently not all pharmacies in New Brunswick are connected to the DIS so a patient’s EHR Profile on the EHR Viewer may be incomplete. It is important you confirm with your patient which medications they are currently taking.

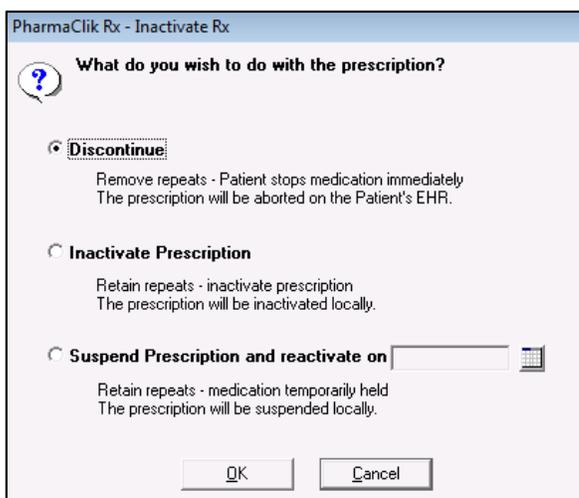
Discontinuing a Prescription

A prescription should be discontinued in situations where the clinician does not want a given prescription to be dispensed again or if a new order is received. Once a prescription is discontinued (aborted), PharmaClik Rx will require a new authorization for a dispense to be made against the discontinued Rx. If you have been advised by the health provider that you discontinued an Rx in error, you will have the ability to retract the discontinue request and set the Rx back to Active. Retracting can only be done if the discontinue was completed at your pharmacy and no other activity has been completed against this transaction.

Only drug prescriptions that are active, suspended or completed can be aborted. When discontinuing a prescription, the status change is transmitted to the DIS so other health care professionals can see the patient is no longer taking the medication.

To discontinue a prescription, do the following:

1. Search for and select the desired patient.
2. Locate the prescription you wish to discontinue from the **Profile** tab.
3. Select the **Active** checkbox. The ‘Inactivate Rx’ window appears.



4. Select the **Discontinue** button select the **OK** button. The ‘Discontinue Prescription’ window appears.
5. Select a reason from the **Reason** dropdown list.

NOTE: The default reason is *Patient Care* but it is important that you select the appropriate reason from the dropdown list.
6. Enter any details in the **Prescription Note** field (optional).
7. Select the user discontinuing the prescription from the **Discontinued By** dropdown list (optional).
8. Select the **OK** button.

The Abort message will be transmitted to the DIS. The prescription will display a *D* to indicate it was discontinued and locally the refills will be 0. The patient’s History will also display the status change, as shown below:

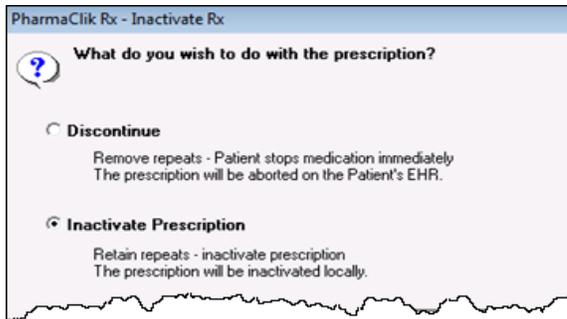
STARK, J	3rd Party	Clinical	Profile	History	Consult	Preferences		Notes
Entered	User	Event	Activity	Comments				
Feb 27, 2016 19:08	BA2	Profile	Rx Deactivated	ACEBUTOLOL HCL;APO-ACEBU				
Feb 27, 2016 19:08	BA2	Profile	Rx Activated	ACEBUTOLOL HCL;APO-ACEBU				

If an error occurs with transmitting the discontinued prescription status to the DIS, a Detected Issue will be displayed and upon pressing the **OK** button the prescription will be discontinued locally only.

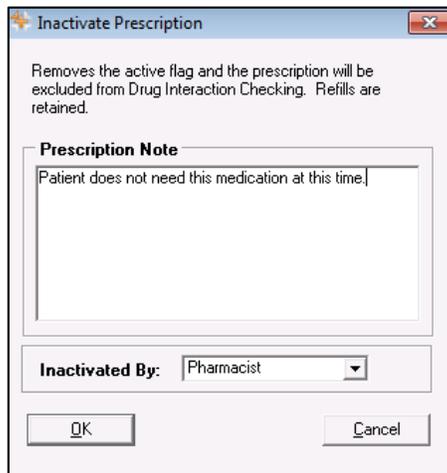
Inactivating a Prescription

When inactivating a prescription the status change is local only and the patient’s refills will still remain. To inactivate a prescription, do the following:

1. Search for and select the desired patient.
2. Locate the prescription currently on file that still has refills.
3. Select the **Active** checkbox. The ‘Inactivate Rx’ window appears.



4. Select **Inactivate Prescription** and select the **OK** button. The ‘Inactivate Prescription’ window appears.
5. Enter any details in the **Prescription Note** field (optional).
6. Select the user discontinuing the prescription from the **Inactivated By** dropdown list (optional).



7. Enter other details regarding discontinuing the prescription (optional).
8. Select the **OK** button.

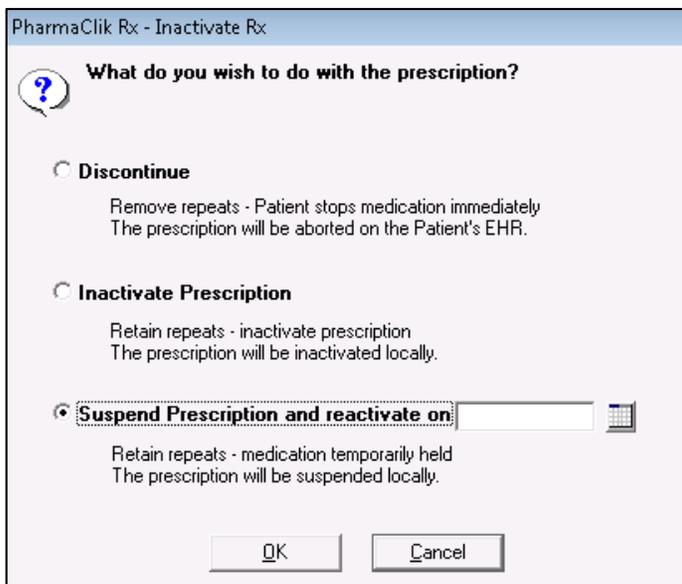
The patient’s History will also display the status change, as shown below:

SMITH, B		3rd Party	Clinical	Profile	History	Consult	Preferences	🔒	Notes
Entered	User	Event	Activity	Comments					
Feb 27, 2016 19:23	BA2	Profile	Rx Deactivated	HYDROCHLOROTHIAZIDE:APC					

Suspending a Prescription

When suspending a prescription the status change is local only and the patient's refills will still remain. To suspend a prescription, do the following:

1. Search for and select the desired patient.
2. Locate the active prescription currently on file.
3. Select the **Active** checkbox. The 'Inactivate Rx' window appears.



PharmaClik Rx - Inactivate Rx

What do you wish to do with the prescription?

Discontinue
Remove repeats - Patient stops medication immediately
The prescription will be aborted on the Patient's EHR.

Inactivate Prescription
Retain repeats - inactivate prescription
The prescription will be inactivated locally.

Suspend Prescription and reactivate on: 
Retain repeats - medication temporarily held
The prescription will be suspended locally.

4. Select the **Suspend** button.
5. Select the **OK** button. The 'Suspend Prescription' window appears.
6. Enter any details in the **Prescription Note** field (optional).
7. Select the user suspending the prescription from the **Suspended By** dropdown list (optional).
8. Select the **OK** button.

The prescription will be suspended locally only and display ***S*** in the patient profile:

Fill Date	Drug Name	Rx#	MFR	REM	Status	Active
Perf On	Strength	Form	Qty	Instructions		
Feb 24, 2016	LETROZOLE	AURO-LETRO2 500855	AUR	0	Complete	<input type="checkbox"/> *S*
Feb 24, 2016	2.5MG	TABLET	30	UD1		
Feb 08, 2016	WARFARIN SODIUM	ARD-w 500729	APX	1	Complete	<input checked="" type="checkbox"/>

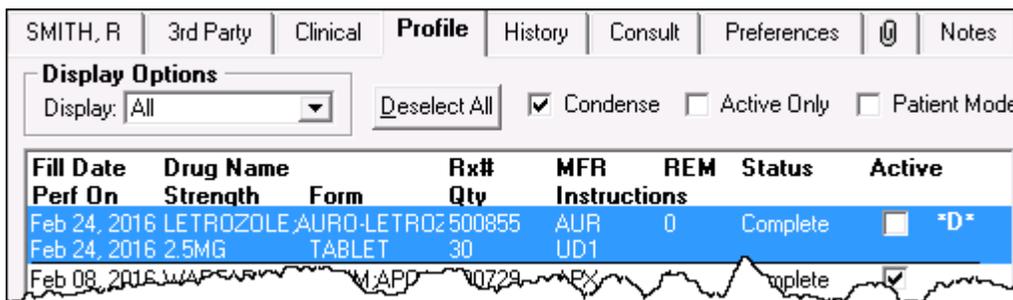
Reactivating a Discontinued Prescription

If a prescription is discontinued in error or stopped in-between refills (i.e. narcotics), users will have the ability to reactivate the prescription. When a discontinued prescription is reactivated, it is restored to its value prior to the discontinuation, including the remaining refills and the quantity authorized. The Rx ID will also be returned so that the patient’s Audit History for the Rx will remain accurate for the next fill.

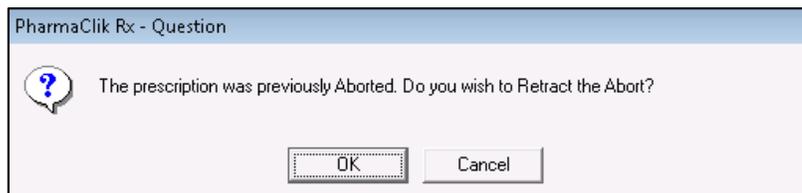
NOTE: Your pharmacy will have the ability to only reactivate prescriptions your pharmacy has discontinued.

To reactivate a discontinued a prescription, do the following:

1. Search for and select the desired patient.
2. Highlight the discontinued prescription you wish to reactivate from the **Profile** tab.



3. Select the **Active** checkbox. The following prompt will appear:



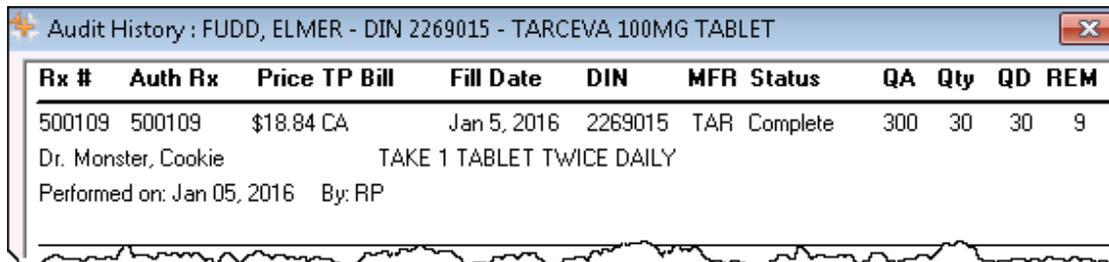
4. Select the **OK** button.

The prescription will be reactivated and on the patient’s Profile tab. The patient’s History tab will display the Activity – Rx Activated, as shown below:



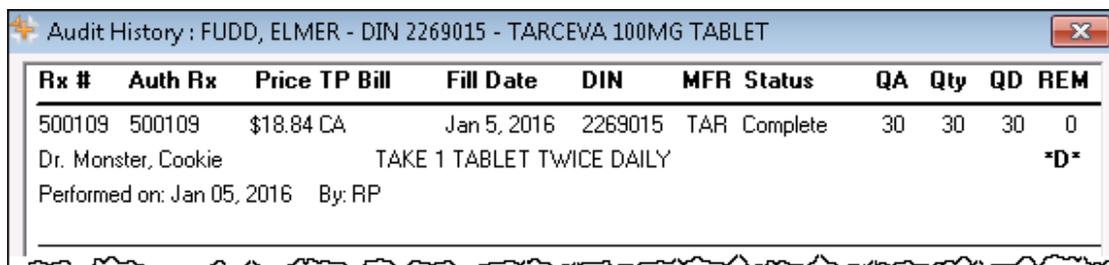
The audit history for the prescription will show no indication of a discontinued prescription. View the sample audit history for a discontinued prescription below:

Audit History After Rx is Dispensed



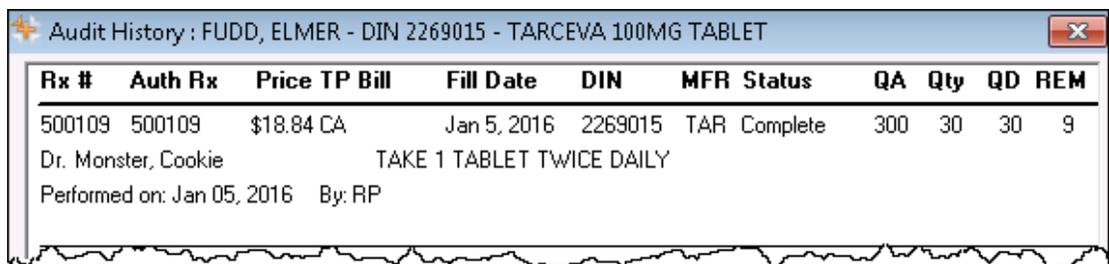
Rx #	Auth Rx	Price TP Bill	Fill Date	DIN	MFR Status	QA	Qty	QD	REM
500109	500109	\$18.84 CA	Jan 5, 2016	2269015	TAR Complete	300	30	30	9
Dr. Monster, Cookie		TAKE 1 TABLET TWICE DAILY							
Performed on: Jan 05, 2016		By: RP							

Audit History After Rx is Discontinued



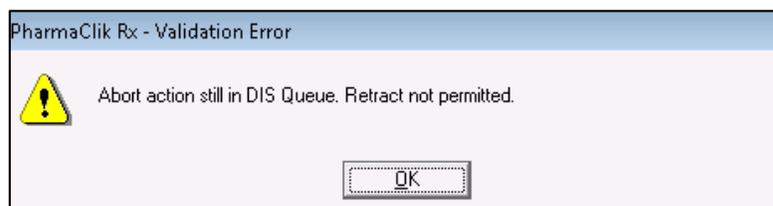
Rx #	Auth Rx	Price TP Bill	Fill Date	DIN	MFR Status	QA	Qty	QD	REM
500109	500109	\$18.84 CA	Jan 5, 2016	2269015	TAR Complete	30	30	30	0
Dr. Monster, Cookie		TAKE 1 TABLET TWICE DAILY							
Performed on: Jan 05, 2016		By: RP							
									D

Audit History After Discontinued Rx is Reactivated



Rx #	Auth Rx	Price TP Bill	Fill Date	DIN	MFR Status	QA	Qty	QD	REM
500109	500109	\$18.84 CA	Jan 5, 2016	2269015	TAR Complete	300	30	30	9
Dr. Monster, Cookie		TAKE 1 TABLET TWICE DAILY							
Performed on: Jan 05, 2016		By: RP							

If the prescription has not been submitted to the DIS (i.e. prescription status is complete, but is sitting in the DIS Queue, the following prompt will appear:

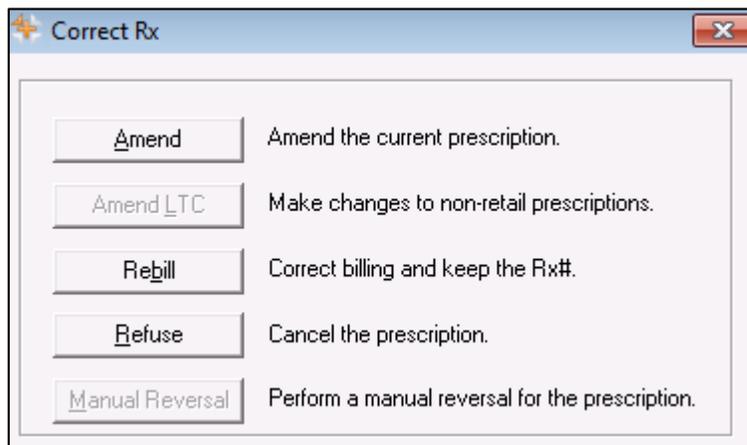


Correcting a Prescription

The **Correct** function allows you to fix an error on a processed prescription (i.e. prescription filled with wrong quantity, wrong drug, or wrong dispensing directions). When a prescription is corrected, the corresponding DIS message will be attempted to be retracted from the DIS.

NOTE: In certain instances you cannot correct a prescription, such as a change in SIG and a change in quantity of the prescription or re-fill. In these scenarios the original prescription must be Discontinued and resubmitted. For more information see the [Discontinuing a Prescription](#) section.

- **Amend** Allows you to make changes to a processed prescription without impact to billing.
- **Amend LTC** Allows you to make changes to non-retail prescriptions (i.e. nursing homes). This option will be disabled for retail prescriptions.
- **Rebill** Allows you to cancel a prescription, correct it, then fill the prescription in one step using the same prescription number and same fill date (i.e. incorrect quantity authorized).
- **Refuse** Allows you to cancel the prescription (i.e. prescription filled in error).
- **Manual Reversal** Allows you to reverse a prescription without adjudication of the reversal online.
- **Wrong Patient** Disabled for eHealth provinces; option is no longer visible .



Amending a Prescription

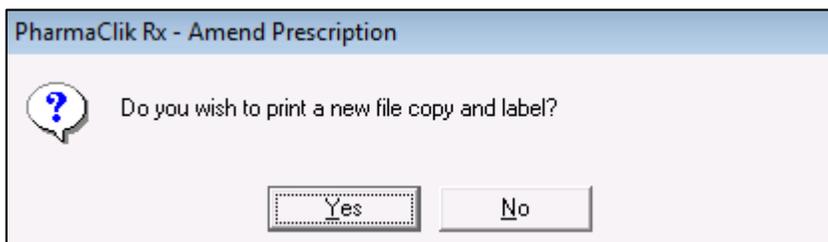
With DIS integration, pharmacies are unable to amend certain fields in prescriptions that have already been successfully transmitted to the DIS. If a prescription is returned with a Detected Issue, users are able to Amend the prescription (i.e. invalid DIN/NPN), and resubmit to the DIS. Users are able to amend Dosett/Dispill information only as this information will remain local.

After DIS Activation, only the following information can be amended:

- Dosett/Dispill
- Lot/Expiry
- Start and Stop Date
- Days option
- Vial Copies
- Ratio
- Drug Name
- Language
- Interval Days
- Next Fill QTY

To amend a prescription, do the following:

1. Open the completed prescription in **Rx Detail**.
2. Select **Rx > Correct**. The 'Correct Rx' window appears.
3. Depending on the patient, select the **Amend** or **Amend LTC** button. The prescription opens in Rx Detail.
4. Modify the necessary information.
5. Once done, select the **OK** button. The following prompt will appear:

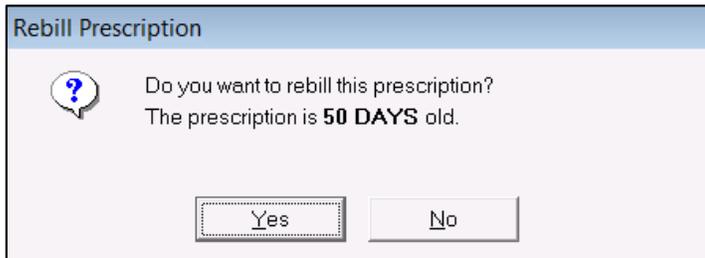


6. Select the Yes button to print a new file copy and label.

Rebilling a Prescription

To rebill a filled prescription, do the following:

1. Open the completed prescription in **Rx Detail**.
2. Select **Rx > Correct**. The 'Correct Rx' window appears.
3. Select the **Rebill** button. A prompt similar to the following will appear:



4. Select the **Yes** button. PharmaClik Rx will reverse the Third Party Claim and reverse the DIS transaction on the patient's EHR Profile on the Client Registry with the correct rebilled information.

Rebilling a Discontinued Prescription

If a prescription is Discontinued and located on the DIS, you cannot make any changes to the billing (**Rx > Correct > Rebill**) as you will get the following Detected Issue:

Error	High	Business Constraint Violation: A local business rule relating multiple elements has been violated.	TRANSACTION NOT ALLOWED DUE TO CURRENT STATUS OF PRESCRIPTION: ABORTED
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In order to correct the billing information, you must **Refuse** the discontinued the prescription, and create a new prescription with the correct billing information.

To rebill a discontinued prescription, do the following

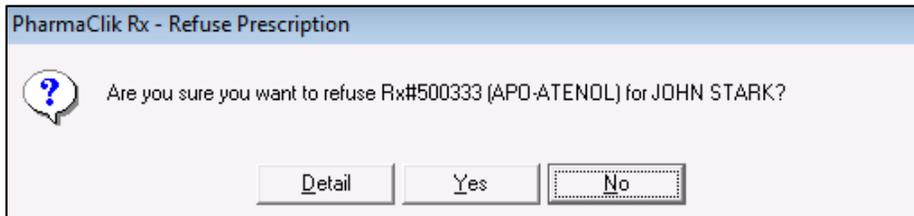
1. Open the *Discontinued* prescription in Rx Detail.
2. Select **Rx > Correct > Refuse**. A validation prompt appears.
3. Select the **Yes** button. The "Refuse Rx" window appears.
4. Select the **Remove** button.
5. Create a new prescription for the same patient, using the correct billing information.
6. Select the **Fill** button.
7. Discontinue the new prescription you just created.

NOTE: It is your pharmacy's responsibility to ensure that all Third Party billing is correct, including claim reversals, and that all documentation is in place in case there is any type of audit performed.

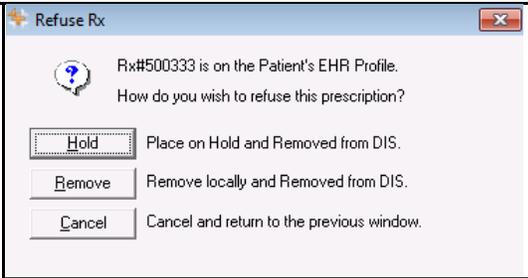
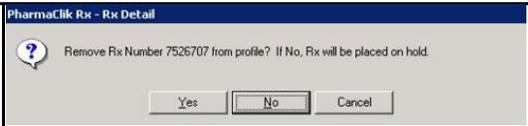
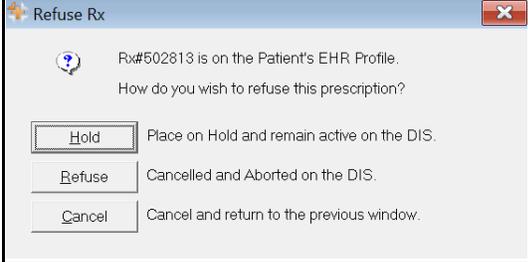
Refusing a Prescription

To refuse a filled prescription, do the following:

1. Open the completed prescription in **RX Detail**.
2. Select **Rx > Correct**. The 'Correct Rx' window appears.
3. Select the **Refuse** button. A prompt will appear confirming the Rx refusal.



4. Select the **Yes** button. The 'Refuse Rx' window appears. Depending on the prescription scenario, the buttons that will be visible in the 'Refuse Rx' window will vary, as indicated in the following chart:

Prescription Scenario	Prompt	Options
First fill of an inferred Rx		<ul style="list-style-type: none"> • Hold: Will reverse the claim from the Third Party and DIS. The Rx will be marked on Hold locally and no record will exist on the patient's EHR Profile. • Remove: Will reverse the claim from the Third Party and DIS. The Rx will be removed from the patient's local Profile and EHR Profile. • Cancel: Exit window with no changes.
Rx is on hold		<ul style="list-style-type: none"> • Yes: Will remove the Rx from the patient's local Profile. • No: Rx will remain on Hold. • Cancel: Exit window with no changes.
First fill Rx on file prior to DIS Activation		<ul style="list-style-type: none"> • Hold: Will reverse the claim from the Third Party and DIS. The Rx will be marked on Hold locally and no record will exist on the patient's EHR Profile. • Remove: Will reverse the claim from the Third Party and DIS. The Rx will be removed from the patient's local Profile and EHR Profile.

Refill Rx on file prior to DIS Activation	No prompt is displayed.	<ul style="list-style-type: none"> Will reverse the claim from the Third Party and DIS. The Rx Status will display <i>Cancelled</i>.
First fill of an Rx with a DIS Type of Device or Non-DIS	No prompt is displayed.	<ul style="list-style-type: none"> Will reverse the claim from the Third Party.
Rx is a refill	No prompt is displayed.	<ul style="list-style-type: none"> Will reverse the claim from the Third Party and DIS. The Rx will have a Cancelled status in PharmaClik Rx.

Transferring a Prescription

The steps for transferring a prescription remain the same, as per existing functionality. Once you transfer a prescription from the 'Transfer Out' window, the original prescription order is aborted on the patient's EHR Profile with a stop reason related to the transfer function. A new prescription order for the remaining quantity can then be created at another pharmacy.

With DIS Activation it is important your pharmacy tracks the following information for prescriptions Transferred-In and Transferred-Out of your pharmacy:

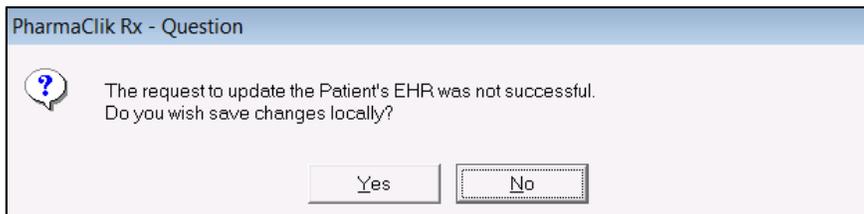
- Written Date
- Balance Remaining
- Transferred information from other Pharmacy
- Continue to scan any reports regarding the Transfer

If the message fails to reach the DIS (i.e. DIS is down, etc.), the following will occur:

1. You will be presented with the following Detected Issue:

Error	High	Business Constraint Violation: A local business rule relating multiple elements has been violated.	TRANSACTION NOT ALLOWED DUE TO CURRENT STATUS OF PRESCRIPTION: ABORTED
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2. Select the **OK** button to acknowledge the Detected Issue. The following prompt will appear:



3. Select one of the following options:
 - **Yes:** Will mark the prescription locally as *Transferred* and will set the refills to zero. No indication of this prescription will exist on the DIS.
 - **No:** The Transfer process will be stopped and there will be no change made to the prescription

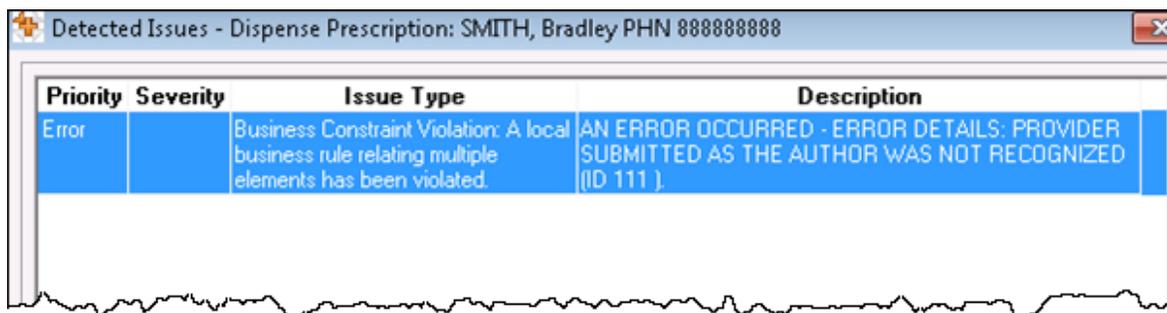
Detected Issues

If the DIS detects an issue with a transaction, it may return a detected issue to alert the user to a potential error, discrepancy, or matter that may be of concern. In some instances it may be necessary to manage the issue in order to advise and communicate to the DIS that some mitigating action was taken to resolve the Detected Issue. While any authorized pharmacy user can view Detected Issues, it is recommended that either a pharmacist manages them, or an authorized pharmacy user does so under the supervision of a Pharmacist.

Viewing Detected Issues

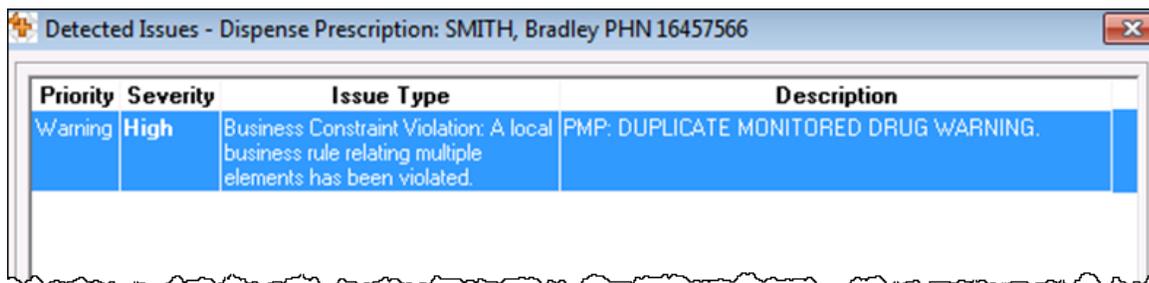
Detected issues have an associated **Priority** (i.e. Error, Warning, or Information) and **Severity**. If a detected issue is returned with a message response, PharmaClik Rx will display the details within the 'Detected Issues' window. This allows the user to view issues on an ongoing basis, clear any outstanding issues, as well as be notified of potential problems. The **Issue Type** and **Description** of these detected issues are generated by New Brunswick.

Error – Requires the Rx to be corrected and the transaction resubmitted:



Priority	Severity	Issue Type	Description
Error		Business Constraint Violation: A local business rule relating multiple elements has been violated.	AN ERROR OCCURRED - ERROR DETAILS: PROVIDER SUBMITTED AS THE AUTHOR WAS NOT RECOGNIZED (ID 111).

Warning – The detected issue is information and you can proceed with the transaction as it has been accepted by the DIS:



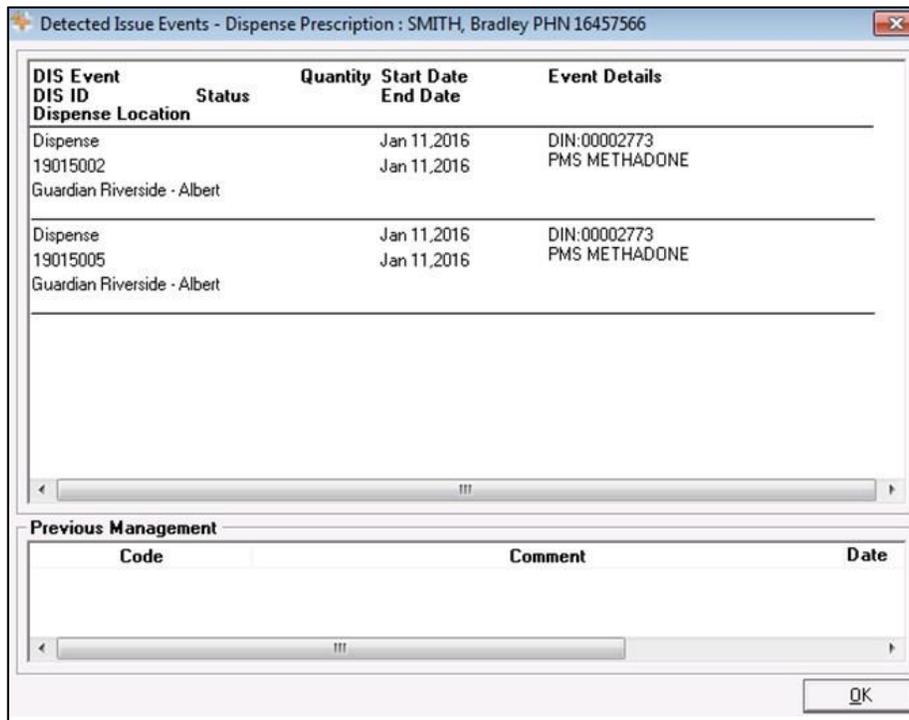
Priority	Severity	Issue Type	Description
Warning	High	Business Constraint Violation: A local business rule relating multiple elements has been violated.	PMP: DUPLICATE MONITORED DRUG WARNING.

Detected issues will be sorted by *Priority* and then by *Severity*. The chart below demonstrates example Detected Issues a user may see and the response they will receive from the DIS when a claim is transmitted:

Priority	Response from DIS	Description of Detected Issue
Error, Warning, or Information	Rejected	The request could not be processed successfully and has been rejected because of the problem. The message requires immediate action to continue. Errors always display before Warnings and Alerts. The issue must be corrected and the claim must be resubmitted. Some examples include <i>Wrong Provider ID</i> , or <i>Wrong DIN</i> .
Warning or Information	Accepted	The request was successfully processed and there were no issues; however a piece of information is being returned that may be of interest. The message does not require immediate action to continue. Some examples include <i>Fill Too Soon</i> , or <i>Duplicate Therapy</i> .

Viewing Detected Issues Events

To view the details of a Detected Issue, double-click the Detected Issue and the 'Detected Issues Events' window will appear. This window displays the events (i.e. prescriptions, allergies, etc.) which caused the detected issues.



Viewing a Detected Issue at a Later Date

Once a Detected Issue has been reviewed or managed, it may also be viewed again at a later time. To view the Detected Issues at a later time, do the following:

1. Open the completed prescription in **Rx Detail**.
2. Select the **EHR** tab.
3. If a Detected Issue existed, select the Folder  icon. The 'Detected Issues' window will appear, displaying the Detected Issue(s).

Rx 200005; SMITH, Auth: 200004 (Jan 11, 2016) Fill: Jan 11, 2016 Last Fill: Jan 11, 2016 (0 days)

Rx: 200005	Extended	EHR	Third Party	Notes
Patient: SMITH Bradley PHN: 16457566 <input type="checkbox"/> Defer EHR Help Desk				
Create				
Rx ID:	4339	No Sub:	<input type="text"/>	
GCN/DIN/PIN:	2773	Treatment Type:	<input type="text"/>	
Prev. Rx ID:	<input type="text"/>	Result:	<input type="text"/>	
Orderable Form:	PA	0 Detected Issue(s): 		
Dispense				
DIS ID:	19015005	Fill Type:	RF - Refill	
DIN/PIN:	2773	Sub Reason:	<input type="text"/>	
Pharmacist:	RP	Sub Code:	<input type="text"/>	
		Result:	Accepted	
			1 Detected Issue(s): 	



Once a Detected Issue has been resolved, users will not be able to view the 'Detected Issue Events' window. The 'Detected Issues Events' window, which displays the events which caused the Detected Issues (i.e. prescriptions, allergies, etc.) is only visible when the Detected Issue window is first presented to the user.

Common Detected Issues

As a DIS integrated pharmacy, it is important that you pay special attention to any Detected Issues that may arise and resolve the issues accordingly. The common Detected Issues below indicate whether they are for informational purposes only, or whether they need to be resolved prior to resubmitting.

Drug is Known to Interact With Another Active Drug

Informational: This Detected Issue will appear as a warning when the drug being dispensed may interact with another drug that the patient is actively taking. To resolve this issue, the pharmacist can review the prescription and the drugs the patient is currently taking to see if the drug therapy should still be dispensed. This Detected Issue will appear for informational purposes only. If determined that the drug will be okay for the patient, no further action is required of the user.

Priority	Severity	Issue Type	Description
Warning	Medium	Drug Interaction Alert: Proposed therapy may interact with an existing or recent drug therapy.	DRUG IS KNOWN TO INTERACT WITH ANOTHER ACTIVE DRUG

Drug Not Recommended for Use

Informational: This Detected Issue will appear as a warning when the drug being dispensed is not recommended due to an existing condition the patient may have (i.e. a medical condition or an allergy). To resolve this issue, the pharmacist can review the prescription, and, if determined that the drug should still be dispensed, and resubmit the transaction to the DIS.

Priority	Severity	Issue Type	Description
Warning	High	Condition Alert: Proposed therapy may be inappropriate or contraindicated due to an existing/recent patient condition or diagnosis.	DRUG IS NOT RECOMMENDED FOR USE DUE TO EXISTING CONDITION

Low Dose Alert

Informational: This Detected Issue will appear when your pharmacy transmits a prescription with a dose that is below the suggested therapeutic level dose. To resolve this issue, the pharmacist must evaluate the prescription and determine whether it is still deemed appropriate to fill. If necessary, you can contact the prescriber. This Detected Issue will appear for informational purposes only. If determined that the drug will be okay for the patient, no further action is required of the user.

Priority	Severity	Issue Type	Description
Warning	High	Low Dose Alert: Proposed dosage is below suggested therapeutic levels.	The prescribed daily dose for ROSUVASTATIN CALCIUM is below the recommended Adult min/max range of 1 EA - 4 EA (400040)

Pediatric Age Precaution Indicated

Informational: This Detected Issue will appear as a warning when the drug being dispensed may be inappropriate to prescribe to a child. To resolve this issue, the pharmacist can review the prescription and the drugs the patient is currently taking to see if the drug therapy should still be dispensed. This Detected Issue will appear for informational purposes only. If determined that the drug will be okay for the patient, no further action is required of the user.

Priority	Severity	Issue Type	Description
Warning	Medium	Age Alert: Proposed therapy may be inappropriate or contraindicated due to patient age.	PEDIATRIC AGE PRECAUTION INDICATED

PMP Duplicate Monitored Drug Warning

Informational: This Detected Issue will appear when a monitored drug is being dispensed which already exists on the patient’s EHR Profile. This Detected Issue will appear for informational purposes only. It is recommended the pharmacist check the patient’s EHR Profile to validate whether the drug being dispensed is a duplicate. If determined that the drug will be okay for the patient, no further action is required of the user.

Priority	Severity	Issue Type	Description
Warning	High	Business Constraint Violation: A local business rule relating multiple elements has been violated.	PMP: DUPLICATE MONITORED DRUG WARNING.

DIN/NPN Does Not Exist

Needs Resolution: This Detected Issue will appear when the DIN/PIN that is submitted in the claim is invalid. As noted in the Detected Issues window below, this is a violation of a business constraint and cannot be managed through an issue management. To resolve this issue, the pharmacist must exit the ‘Detected Issues’ window and use the **Amend** button to modify the DIN/PIN in the Alternatives tab of the Drug Folder, and then resubmit the transaction to the DIS. For more information, see the [DIS DIN/PIN and Type Field](#) section.

Priority	Severity	Issue Type	Description
Error	High	Business Constraint Violation: A local business rule relating multiple elements has been violated.	DIN OR NPN DOES NOT EXIST

Provider Submitted Not Recognized

Needs Resolution: This Detected Issue will appear when the pharmacist is the prescriber and their license# is entered incorrectly. To resolve this Detected Issue, log into PharmaClik Rx as the administrator and select **More > Pharmacy > Security**. Highlight the pharmacist, and correct the license #.

Priority	Severity	Issue Type	Description
Error		Business Constraint Violation: A local business rule relating multiple elements has been violated.	AN ERROR OCCURRED - ERROR DETAILS: PROVIDER SUBMITTED AS THE AUTHOR WAS NOT RECOGNIZED (ID 123).

Prescriber Not Authorized to Prescribe

Needs Resolution: This Detected Issue will appear when the prescriber (Doctor Folder) that is selected is not authorized to prescribe drugs. To resolve this issue, the pharmacist must verify the prescriber from the original prescription and, if it is incorrect, modify the doctor on the prescription before resubmitting to the DIS. Also, verify that the Doctor’s status is *Active* in the Doctor Folder as this is the only Doctor status allowed to prescribe. For more information, see the [Doctor Status](#) section.

Priority	Severity	Issue Type	Description
Error	High	Business Constraint Violation: A local business rule relating multiple elements has been violated.	PRESCRIBER NOT AUTHORIZED TO PRESCRIBE

Prescriber Not Found or Terminated

Needs Resolution: This Detected Issue will appear when the prescriber (Doctor Folder) that is selected has a status of *Terminated*. To resolve this issue, the pharmacist must verify the prescriber from the original prescription and, if it is incorrect, modify the doctor on the prescription before resubmitting to the DIS. If the Doctor Folder selected is correct, then the status must be validated. For more information, see the [Doctor Status](#) section.

Priority	Severity	Issue Type	Description
Error	High	Business Constraint Violation: A local business rule relating multiple elements has been violated.	PRESCRIBER NOT FOUND OR TERMINATED

No Patient Found With Identifier Provided

Needs Resolution: This Detected Issue will appear when your pharmacy has synchronized your patient with a patient file on the Client Registry (CR) that no longer exists. For example, if a pharmacy were to create a new patient instead of synchronizing the patient with an existing profile on the CR, then the patient would have 2 profiles on the CR. As a result, the New Brunswick government will merge the data from these 2 patient profiles (so only 1 profile will exist) and remove the other profile. If your pharmacy was synchronized with the profile that is removed, then this Detected Issue will appear. To resolve this issue, the pharmacist must synchronize the patient again. For more information, see the [Searching for and Synchronizing a Patient](#) section.

Priority	Severity	Issue Type	Description
Error		Business Constraint Violation: A local business rule relating multiple elements has been violated.	AN ERROR OCCURRED - ERROR DETAILS: NO PATIENT FOUND WITH IDENTIFIER PROVIDED.

Batch Processing

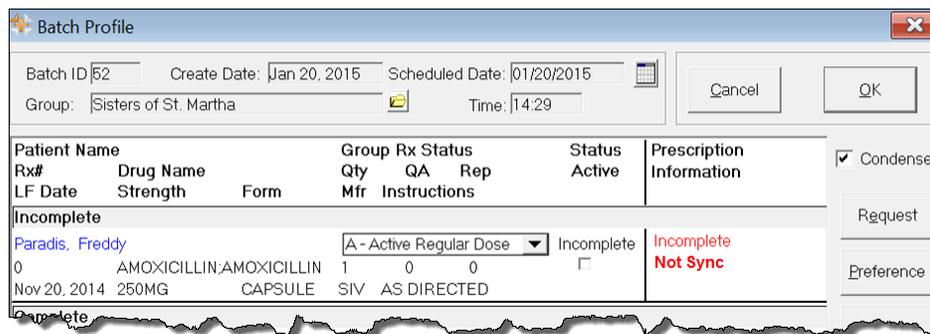
Batch Processing can occur for both retail and non-retail transactions. Batching allows prescriptions to be dispensed as a group and processed without direct user intervention. Batching is also available for Dosset, Dispill and any regular retail and/or non-retail prescriptions.

Non-Synchronized Patients

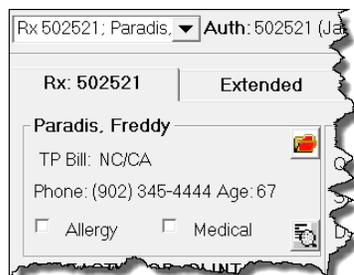
As indicated in the section, all patients must be synchronized before any DIS messages can be transmitted. During Batch Evaluation, if a patient is not synchronized the prescription information will display **Not Sync**.

To synchronize a patient from the 'Batch Profile' window, do one of the following:

1. Highlight the incomplete prescription that indicates **Not Sync**.



2. Select the **Detail** button. The prescription opens in Rx Detail.
3. Select the Folder icon next to the patient information. The Patient Folder appears.

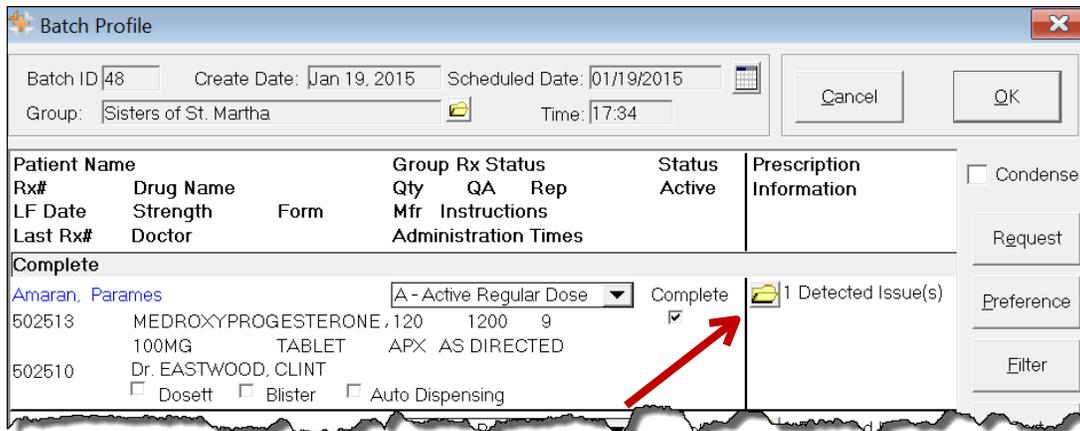


4. Synchronize the patient.
 - If your patient is a new CR Patient, follow the instructions outlined in [Existing PharmaClik Rx Patient/New CR Patient](#).
 - If your patient is an existing CR patient, follow the instructions outlined in [Existing PharmaClik Rx Patient/Existing CR Patient](#).
5. Navigate back to the 'Batch Profile' window.
6. Highlight the prescription for the patient you synchronized.
7. Select the **Submit** button. The prescription will begin processing.

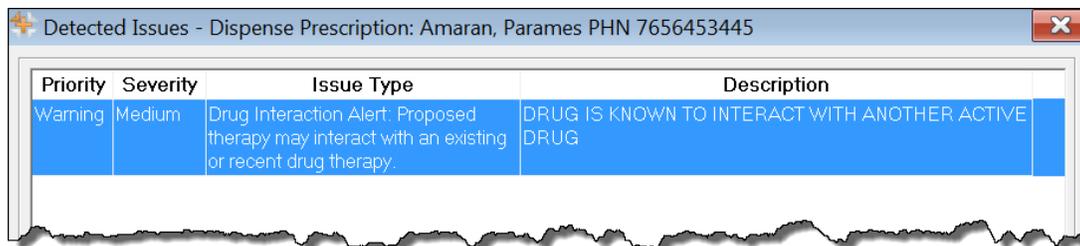
Detected Issues

Any Detected Issues returned with the DIS prescription message will be visible from the Detected Issue(s) Folder within the Batch Profile window. To view the Detected Issues from the Batch Profile window once the batch has run, do the following:

1. From the Workbench, highlight an Rx that was in your batch.
2. Select **Rx > Batch**. The 'Batch Profile' window appears.



3. Select the yellow Detected Issue(s) Folder next to the prescription you wish to view. The 'Detected Issues' window will appear.



4. If the prescription status in the 'Batch Profile' window is
 - **Incomplete, Rejected, or Failed:** You must correct the error. Once done, select the Submit button to resubmit the Rx for processing.
 - **Complete:** The prescription has been successfully processed. The detected issues did not stop the prescription from processing.

DIS Queue Tab

The purpose of a DIS Queue is to allow you to continue to service your patients and process prescriptions even if the DIS is temporarily unavailable. This tab will manage any transactions that were unable to be processed due to the New Brunswick DIS being unavailable (i.e. add patients, update patients, and update prescriptions).

One of the main advantages of the DIS Queue is that there is no interruption of service to your patients when the DIS is unavailable. Prescriptions will be successfully adjudicated and a label set with correct pricing information will be printed.

Prescriptions		Activities		Messages		DIS Queue (10)																
Status	Creation Date	Patient			# Tx																	
Failed	Dec 19, 2014 10:49	tester, seven			5																	
Rejected	Jan 23, 2015 10:38	Strezov, Jennifer			3																	
Deferred	Feb 05, 2015 16:50	McKesson, Elvis Bob			2																	
<div style="display: flex; justify-content: space-between;"> Patient: <input type="text" value="McKesson, Elvis Bob"/> PHN: <input type="text" value="123456789"/> </div> <table border="1" style="width: 100%;"> <thead> <tr> <th>Status</th> <th>Creation Date</th> <th>Rx Number</th> <th>Transaction Description</th> <th>Transaction N:</th> </tr> </thead> <tbody> <tr> <td>Deferred</td> <td>Feb 05, 2015 16:50</td> <td>502710</td> <td>Record dispense processing request</td> <td>Dispense Presc</td> </tr> <tr> <td>Deferred</td> <td>Feb 05, 2015 16:50</td> <td>502710</td> <td>Record dispense pickup request</td> <td>Dispense Picku</td> </tr> </tbody> </table>								Status	Creation Date	Rx Number	Transaction Description	Transaction N:	Deferred	Feb 05, 2015 16:50	502710	Record dispense processing request	Dispense Presc	Deferred	Feb 05, 2015 16:50	502710	Record dispense pickup request	Dispense Picku
Status	Creation Date	Rx Number	Transaction Description	Transaction N:																		
Deferred	Feb 05, 2015 16:50	502710	Record dispense processing request	Dispense Presc																		
Deferred	Feb 05, 2015 16:50	502710	Record dispense pickup request	Dispense Picku																		



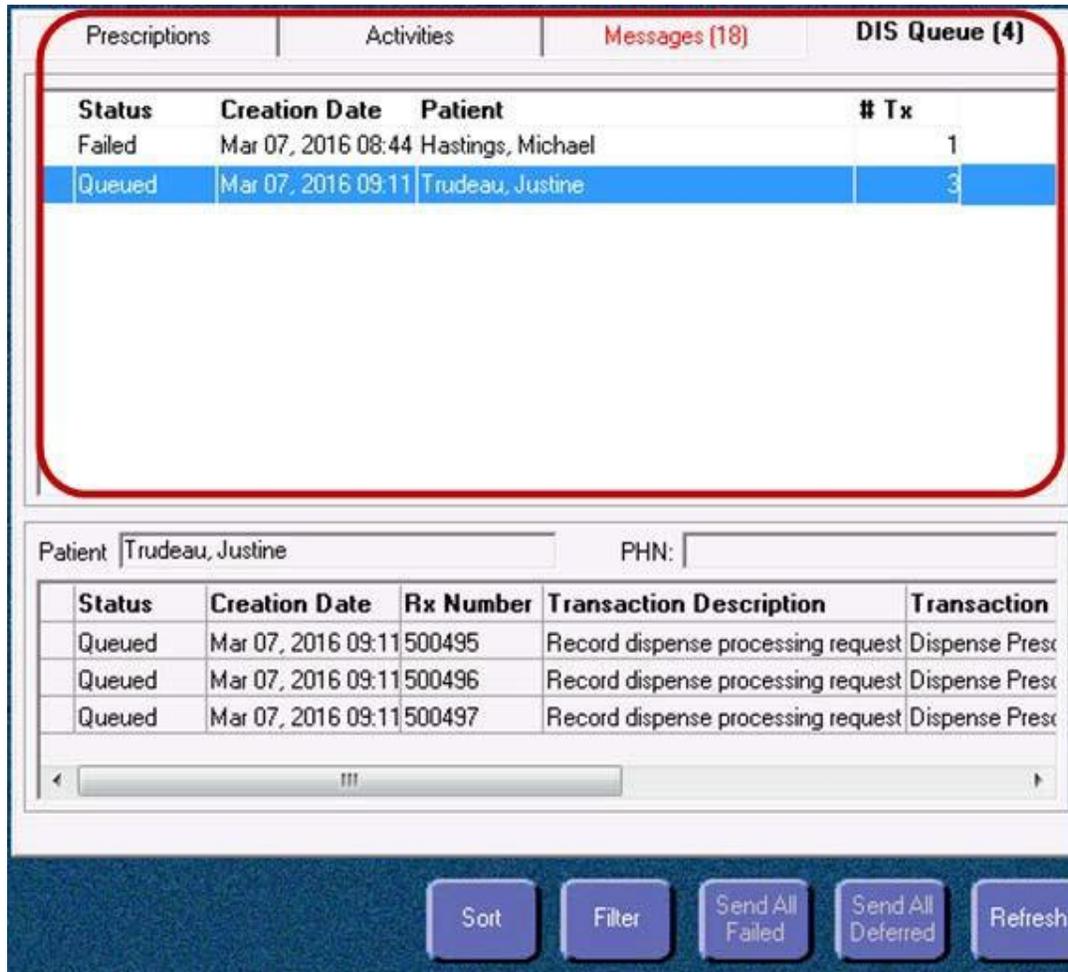
PharmaClik Rx will continually monitor the DIS availability and process any DIS Queued transactions. Each pharmacy, however, is responsible for ensuring that any failed or rejected DIS Queue transactions are resolved each day.

When the network is down, claims are queued in order of creation. If a patient has a DIS queued transaction(s) then all subsequent transactions will be queued and processed in order. No new claims for a particular patient can be sent to the DIS until all queued claims for that patient have been sent. This is because a prior queued claim may have an impact on the results of another claim that is sent down (i.e. an allergy add request must be sent before more dispenses are sent because that may affect the outcomes of the DUR processing for those subsequent dispenses).

The DIS Queue tab is divided into two views: **Transaction Summary** and **Detailed Transactions**. Only one view can be selected at a time. The background colour will change to white when the focus has been placed on the view.

Transaction Summary View

The Transaction Summary view is the top pane of the DIS Queue tab. The Transaction Summary view lists all DIS Queue transactions summarized by patient or user (for certain messages). Each row represents a summary view for each patient or user.



Status	Creation Date	Patient	# Tx
Failed	Mar 07, 2016 08:44	Hastings, Michael	1
Queued	Mar 07, 2016 09:11	Trudeau, Justine	3

Status	Creation Date	Rx Number	Transaction Description	Transaction
Queued	Mar 07, 2016 09:11	500495	Record dispense processing request	Dispense Presc
Queued	Mar 07, 2016 09:11	500496	Record dispense processing request	Dispense Presc
Queued	Mar 07, 2016 09:11	500497	Record dispense processing request	Dispense Presc

Status: Displays the transmission status of the first transaction for the patient or user

- **Queued** – Message is waiting to be sent.
- **Started** – Message is currently being sent.
- **Rejected** – Message is rejected by the DIS with Detected Issues. User must attempt to manage the Issue(s).
- **Failed** – Message transmitted unsuccessfully after a predefined number of attempts.
- **Deferred** – Message is waiting to be sent as per the request of the user.

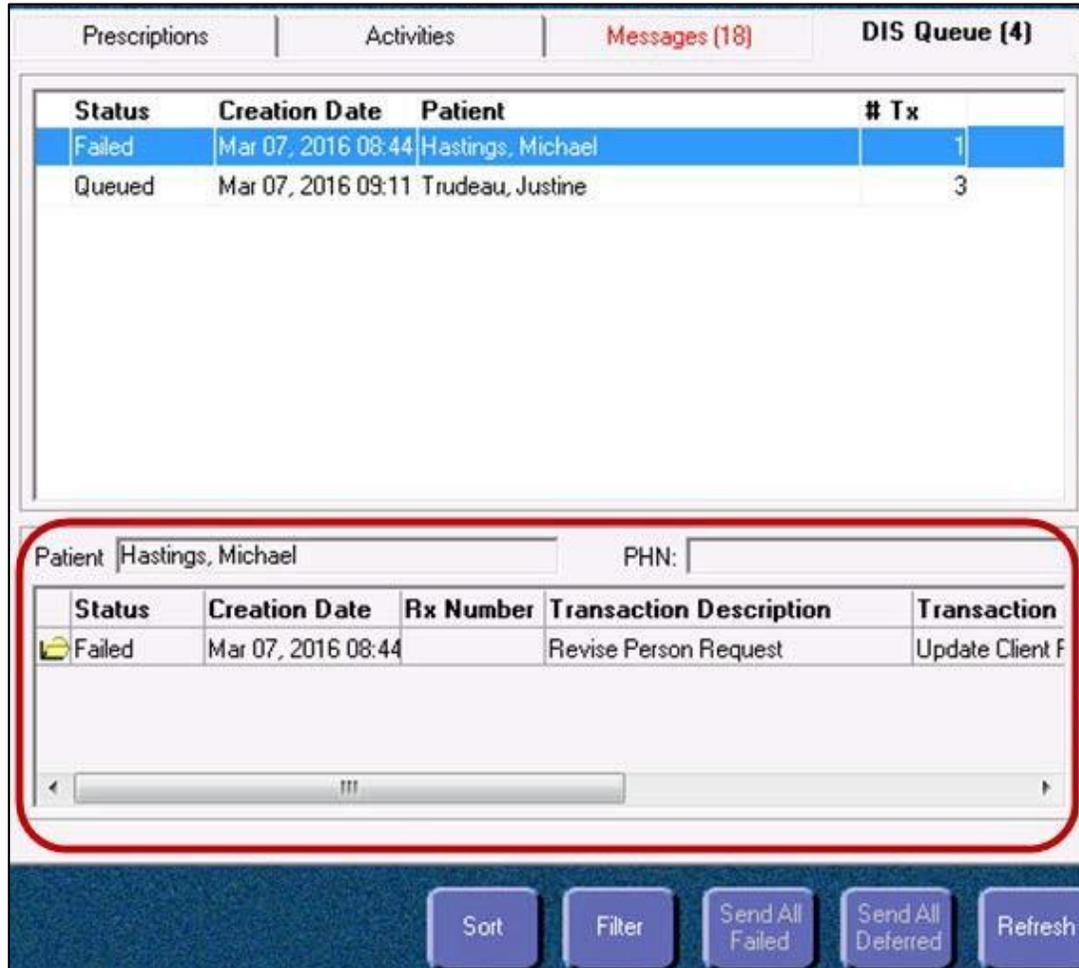
Patient: The name of the patient or user which has DIS Queue transactions.

Creation Date: The date and time in which the first transaction was placed into the DIS Queue for the patient or user.

Tx: The total number of transactions which are currently in the DIS Queue for the patient or user.

Detailed Transaction View

The Detailed Transactions view is the bottom pane of the DIS Queue tab. The Detailed Transactions view lists all the DIS transactions that have been queued for a selected patient or user. Each row represents a detailed view for each transaction.



Issues/Errors: A yellow folder icon will display the details of the issue or error when a transaction has status of failed or rejected. Selecting this icon will display the 'Detected Issues' window for Rejected transactions or a message prompt for Failed transactions.

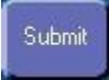
Status: Displays the transmission status of the DIS Queued transaction. The status will be one of the following:

- **Queued** – Message is waiting to be sent.
- **Started** – Message is currently being sent.
- **Rejected** – Message is rejected by the DIS with Detected Issues. User must attempt to manage the Issue(s).
- **Failed** – Message transmitted unsuccessfully after a predefined number of attempts.
- **Deferred** – Message is waiting to be sent as per the request of the user.

Creation Date:	Represents the date and time the DIS Queued transaction was originally created.
Rx Number:	The prescription number of the prescription that is in the DIS Queue. This allows a user to easily correct prescriptions rather than having to search for the specific prescription.
Transaction Name:	PharmaClik Rx Display Name of the DISQueued transaction.
Transaction Description:	DIS Queued transaction description.
Attempt Date:	Displays the actual date and time that the transaction is submitted.
# Attempts:	When the DIS Queued transaction is submitted there will be a counter that keeps track of the total number of attempts and the current attempt number.
Initials:	Each DIS Queued transaction will have a user associated with it. This will be the actual user that created the DIS transaction.

DIS Queue Buttons

When in the DIS Queue, certain buttons will be visible to the user in order to help manage the Queue.

Transaction Summary	
	<ul style="list-style-type: none"> The Submit button will be enabled if the highlighted row in the top pane has a DIS Queue Status of Failed or Deferred for the first DIS Queued transaction in the patient or user group. This button will be disabled for all other DIS Queued Status transactions. Selecting this button will change the status of the highlighted DIS Queued transaction to Queued.
	<ul style="list-style-type: none"> Allows a user to sort all transactions in their DIS Queue tab using the following options: <i>Creation Date</i>, <i>#Tx</i>, <i>Patient</i>, and <i>Status</i>. Sorting items by the option <i>Icon</i> is not possible. This option will be removed in a future enhancement.
	<ul style="list-style-type: none"> Allows you to enter in filter criteria in order to shorten the number of transactions that can be viewed (i.e. if you are looking for a specific prescription).
	<ul style="list-style-type: none"> Transmits all transactions with a status of Failed.
	<ul style="list-style-type: none"> Transmits all transactions with a status of Deferred.
Detailed Transaction	
	<ul style="list-style-type: none"> Transmits the highlighted transaction with a status of Failed.
	<ul style="list-style-type: none"> Transmits the highlighted transaction with a status of Deferred.
	<ul style="list-style-type: none"> Allows a user to modify an issue with a prescription and resubmit the claim to the DIS (i.e. invalid provider or DIN#).
	<ul style="list-style-type: none"> Allows a user to remove an interaction from the DIS Queue. This button should only be used if <u>every</u> option has been exhausted to correct the prescription.

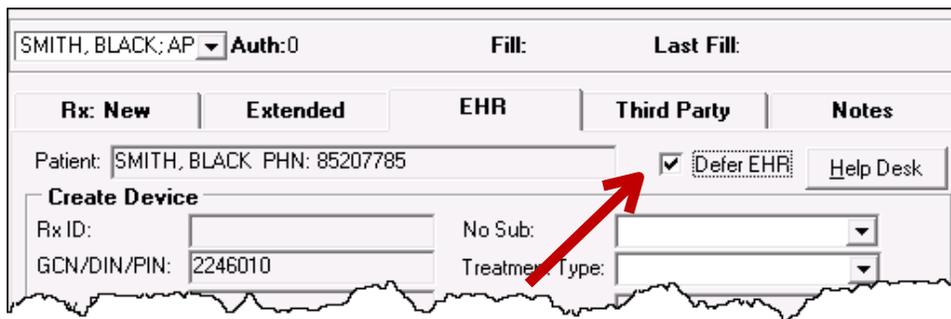
Deferring Prescriptions to the DIS Queue

Users may be required to process a prescription for a waiting patient; however, the prescription may have an issue that is not accepted by the New Brunswick DIS and additional investigation with the NB DIS Support team is required. For example, the DIN is not on file. In this example, the product will be added to the DIS eventually, however the PharmaClik Rx user still needs to be able to process the prescription. For this purpose the user can use the **Defer EHR** functionality.

The Defer EHR functionality applies to prescription processing only. This functionality allows the PharmaClik Rx user to temporarily bypass the DIS for Rx and Rx Device transactions. The deferred prescriptions will be added to the DIS Queue and the user will be responsible for sending the applicable DIS transactions at the appropriate time.

To defer a prescription, do the following:

1. Open a prescription in RX Detail.
2. Select the **EHR** tab.
3. Select the **Defer EHR** checkbox.



SMITH, BLACK; AP Auth:0 Fill: Last Fill:

Rx: New Extended **EHR** Third Party Notes

Patient: SMITH, BLACK PHN: 85207785 Defer EHR Help Desk

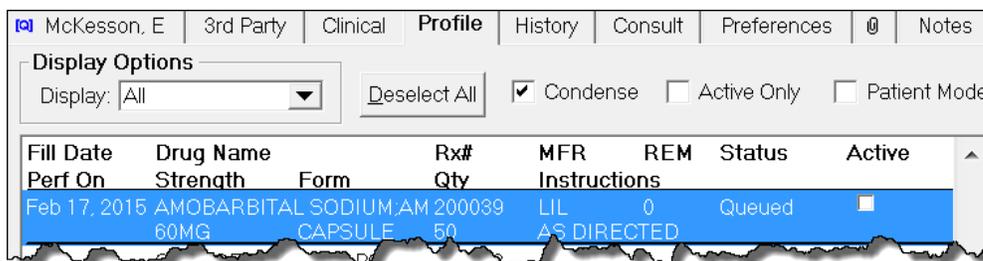
Create Device

Rx ID: No Sub: Treatment Type:

GCN/DIN/PIN: 2246010

4. Continue filling the prescription as usual.

Any future DIS transactions associated with the prescription will also be added to the *DIS Queue* and will have a **DIS Queue Status** of **Deferred** and a Patient Profile status of **Queued** until the Deferred Rx is processed. A **[Q]** indicator will display on the main tab name when the patient has transactions currently in the DIS Queue. This will serve as a reminder to the user to deal with the pending prescriptions. For more information, see the [DIS Queue Tab](#) section.



Fill Date	Drug Name	Rx#	MFR	REM	Status	Active
Feb 17, 2015	AMOBARBITAL SODIUM,AM	200039	LIL	0	Queued	<input type="checkbox"/>
	60MG CAPSULE	50	AS DIRECTED			

Viewing Failed/Rejected DIS Claims

When a claim or prescription is not successfully transmitted to the DIS, the claim will remain in the DIS Queue tab and the status will be one of the following:

- **Failed** The DIS Network was unavailable.
- **Rejected** The claim was rejected due to an error that must be resolved prior to re-transmitting.
- **Deferred** Claim was selected to temporarily bypass the DIS and has yet to be submitted to the DIS.
- **Queued** Claim is waiting to connect to the DIS network in order to be sent.

Prescriptions
Activities
Messages (18)
DIS Queue (4)

Status	Creation Date	Patient	# Tx
Failed	Mar 07, 2016 08:44	Hastings, Michael	1
Queued	Mar 07, 2016 09:11	Trudeau, Justine	3

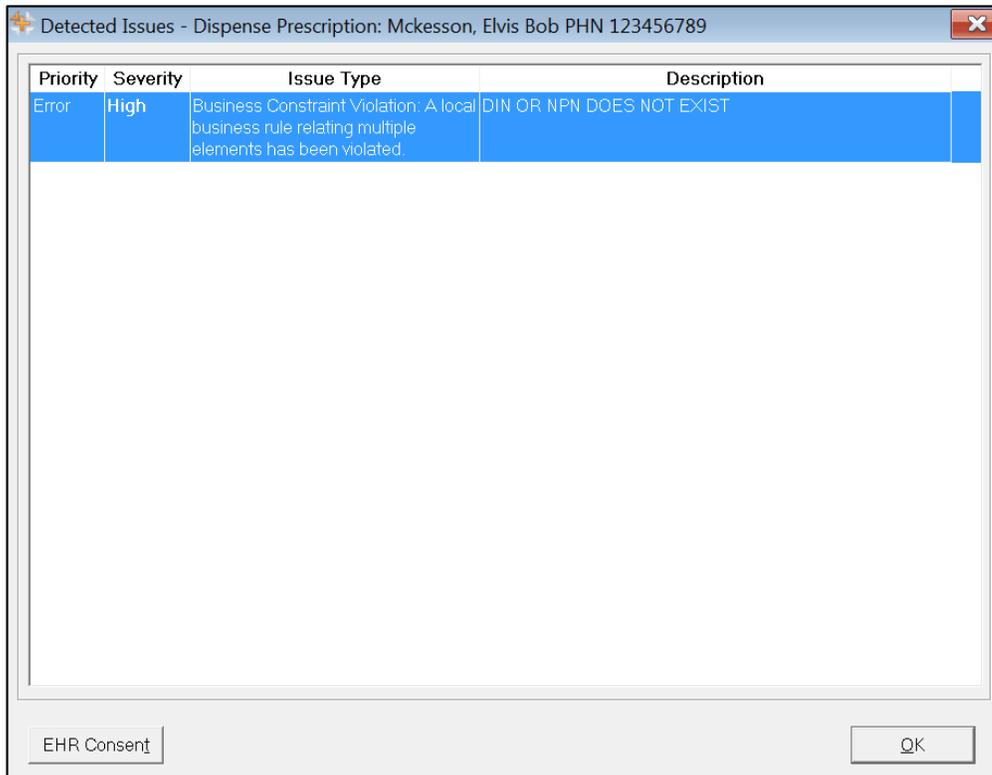
Patient
PHN:

Status	Creation Date	Rx Number	Transaction Description	Transaction
Failed	Mar 07, 2016 08:44		Revise Person Request	Update Client F

Resolving Failed/Rejected Claims

To resolve a failed/rejected DIS claim, do the following:

1. Select the **DIS Queue** tab.
2. Highlight the claim you wish to view. All the claims that have been rejected by the DIS for the patient will appear below with the **Status** and **Transaction Description**.
3. Select the **Folder** icon next to the transaction you wish to view. The 'Detected Issues' window will appear with the error.



4. Resolve the error.

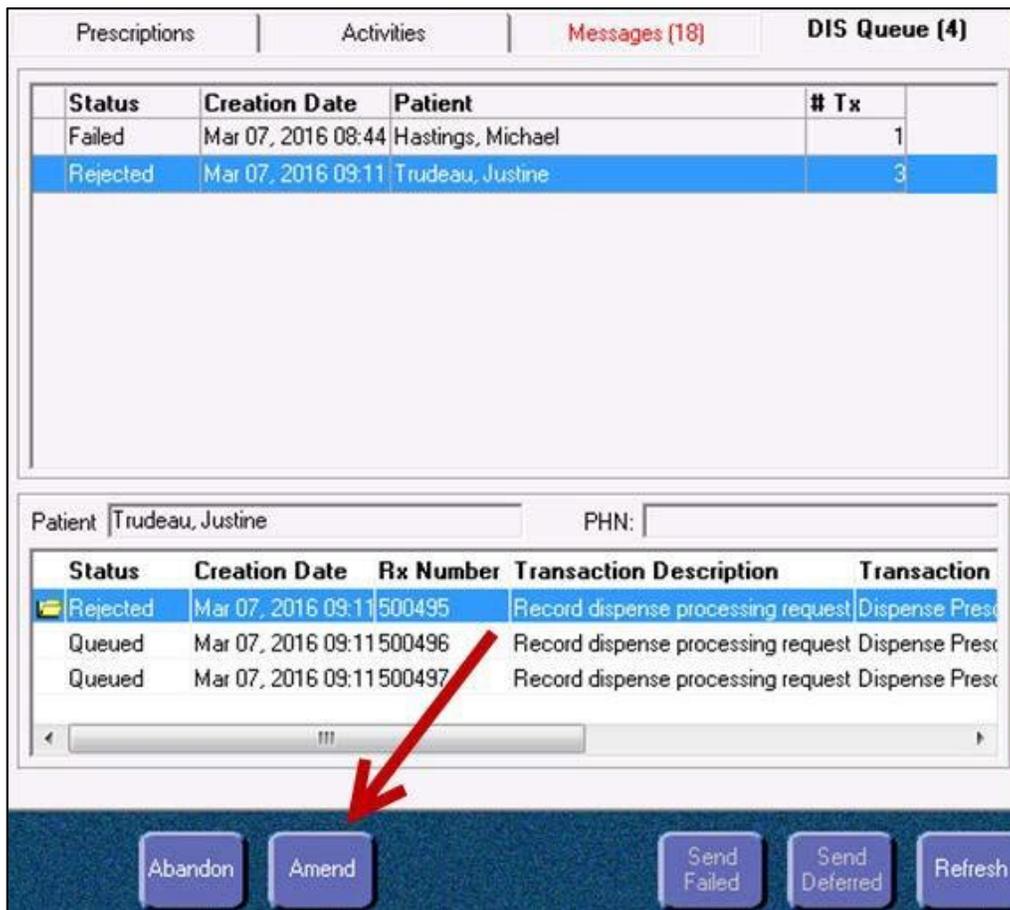
NOTE: In the example above, the DIN/PIN is invalid. The user must select the **Cancel** button, highlight the Rx and select the **Amend** button. This will allow them to modify the DIN/PIN in the Alternatives tab, and resubmit the Rx to the DIS.
5. Select the **OK** button.
6. Select the **Send Failed** or **Send Deferred** button depending on the status of the claim you are trying to transmit.
7. Ensure you claim was transmitted by checking the **DIS Queue** tab and making sure the claim is no longer there.

Amend Button

An **Amend** button has been added to the DIS Queue. By selecting the Amend button, users will be able to modify an issue with a failed or rejected claim, and resubmit to the DIS (i.e. invalid Provider License #).

This will avoid the user having to find the prescription on the patient's profile and selecting **Rx > Correct > Amend**. It will also improve workflow when managing items that have been placed in the DIS Queue.

The Amend button will not be available for deferred prescriptions as the claim has not been processed and submitted to the New Brunswick DIS.



The screenshot shows the 'DIS Queue (4)' section of the application. At the top, there are tabs for 'Prescriptions', 'Activities', 'Messages (18)', and 'DIS Queue (4)'. Below the tabs is a table with the following data:

Status	Creation Date	Patient	# Tx
Failed	Mar 07, 2016 08:44	Hastings, Michael	1
Rejected	Mar 07, 2016 09:11	Trudeau, Justine	3

Below this table, there is a patient selection area with 'Patient: Trudeau, Justine' and a 'PHN:' field. Underneath is another table with columns: Status, Creation Date, Rx Number, Transaction Description, and Transaction. The first row is highlighted in blue and has a red arrow pointing to it from the 'Amend' button below.

Status	Creation Date	Rx Number	Transaction Description	Transaction
Rejected	Mar 07, 2016 09:11	500495	Record dispense processing request	Dispense Presc
Queued	Mar 07, 2016 09:11	500496	Record dispense processing request	Dispense Presc
Queued	Mar 07, 2016 09:11	500497	Record dispense processing request	Dispense Presc

At the bottom of the interface, there is a navigation bar with buttons: 'Abandon', 'Amend', 'Send Failed', 'Send Deferred', and 'Refresh'. A red arrow points from the 'Amend' button up to the first row of the second table.



Users are reminded to check the DIS Queue frequently (i.e. daily), to ensure items are resolved in a timely manner.

Abandon Button

An **Abandon** button has been added to the DIS Queue. By selecting the Abandon button, users can remove an interaction from the DIS Queue. This button may be required if, for whatever reason, the claim cannot be corrected and submitted to the DIS through the normal process. Only rejected or failed transactions can be abandoned. If a transaction is abandoned, the user is required to enter a reason. This entry is tracked in the patient's History tab.

The Abandon button will not be available for deferred prescriptions as the claim has not been processed and submitted to the New Brunswick DIS.

The user will be responsible to review this Rx and ensure that the patient's EHR is corrected. The **Abandon** button should only be used if every option has been exhausted to correct the prescription.



When using the Abandon button, it is the pharmacy's responsibility to go back to the patient's profile to reverse any financial adjudication and correct the Rx. Pharmacies in New Brunswick, by law, must ensure the patient's EHR is accurate and up to date.

Status	Creation Date	Patient	# Tx
Failed	Mar 07, 2016 08:44	Hastings, Michael	1
Rejected	Mar 07, 2016 09:11	Trudeau, Justine	3

Status	Creation Date	Rx Number	Transaction Description	Transaction
Rejected	Mar 07, 2016 09:11	500495	Record dispense processing request	Dispense Presc
Queued	Mar 07, 2016 09:11	500496	Record dispense processing request	Dispense Presc
Queued	Mar 07, 2016 09:11	500497	Record dispense processing request	Dispense Presc

Buttons: Abandon, Amend, Send Failed, Send Deferred, Refresh

DIS Network Is Unavailable

When the connection to the DIS is lost, or the network is down, you should first confirm that the DIS is down by contacting the PharmaClik Rx Customer Care team. PharmaClik Rx will prompt you with the following error message when a communication error with the DIS is detected:



If there is a communication error with the DIS prompt will appear. If this prompt appears, select the **Retry** button to attempt to re-submit the prescription to the DIS in case the connection error was temporary.



The patient will be saved locally and an Add Person request will be pending in the DIS Queue, with a status of Queued, until the DIS connection is restored. It is also imperative to ensure someone is responsible to ensure your DIS QUEUE is cleared on a daily basis.

NOTE: When a transaction is placed in the DIS Queue, PharmaClik Rx will attempt to resend it to the DIS 5 times. If after 5 attempts the DIS connection is not restored, your store must manually submit the claim by selecting the **Submit All Failed** button.

Once it is confirmed the DIS is down, your pharmacy has the following 4 options:

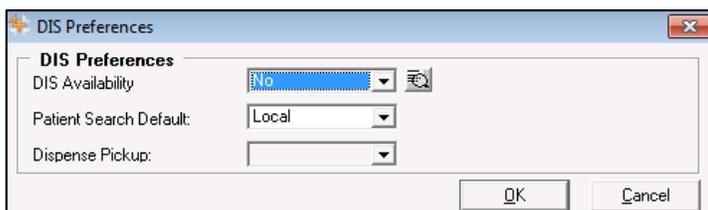
- [Set DIS Availability to No](#)
- [Continue Filling Prescriptions](#)
- [Stop Filling Prescriptions](#)
- [Pend Prescriptions](#)

Set DIS Availability to No

If the New Brunswick DIS will be down for an extended period of time, you may choose to set the DIS Availability to NO. When the DIS Availability is changed, PharmaClik Rx will track the user and reason why it was changed. If a claim is submitted while the DIS Availability is set to NO, it will be in the DIS Queue with a status of 'Queued'. The Patient Folder will also have a [Q] to indicate the patient has prescriptions that are queued, as shown below:

To set the DIS Availability to No, do the following:

1. Select **More > New Brunswick**. The 'DIS Preferences' window appears.
2. Select **No** from the *DIS Availability* dropdown list.



3. Select the **OK** button. A window appears.
4. Enter the reason why you are changing the DIS availability (mandatory).
5. Select the **OK** button.



If your DIS Queue has a large number of queued transactions, it is recommended you wait until after hours (i.e. once your pharmacy is closed) to start submitting them as this will impact performance.

Continue Filling Prescriptions

When the connection to the Drug Information System is lost, or the network is down, you may choose to continue to fill the prescription and attempt to connect to the DIS with each transaction. If the DIS remains down, your prescription will be sent to the DIS Queue. This will permit you to continue to serve your customer as a label set will print with pricing and dosage information. Once the DIS comes back up, all your prescriptions in the DIS Queue will be transmitted to the DIS.

When the DIS is down and the user adds an allergy you will still be able to add the allergy locally, but will need to remember to send it to the DIS when it is back up.

Stop Filling Prescriptions

You may choose to stop filling prescriptions until the connection to the DIS is restored (i.e. ask the customer to wait until the connection is restored).

Pend Prescriptions

You may choose to fill the prescription until the prescription reaches the RX Detail window and then select the **Pend** button. The Prescription will then be saved / stored to the Workbench. At that point, the user may print an incomplete label of the prescription if they wish, but in most cases the claim will not leave the pharmacy until the issue is resolved. This label set will be incomplete as it will not contain the correct paid amount, however it will provide you with a Vial Label that you may be able to dispense the prescription and Bill the customer later when the Network connection is returned, or to leave in the TO DO Basket.

When the network is returned, the prescription remains on the Workbench and can be submitted to the DIS and Third Parties for payment. A new up to date Label Set will be printed to be filed about with the prescription information.

Patient Centre App

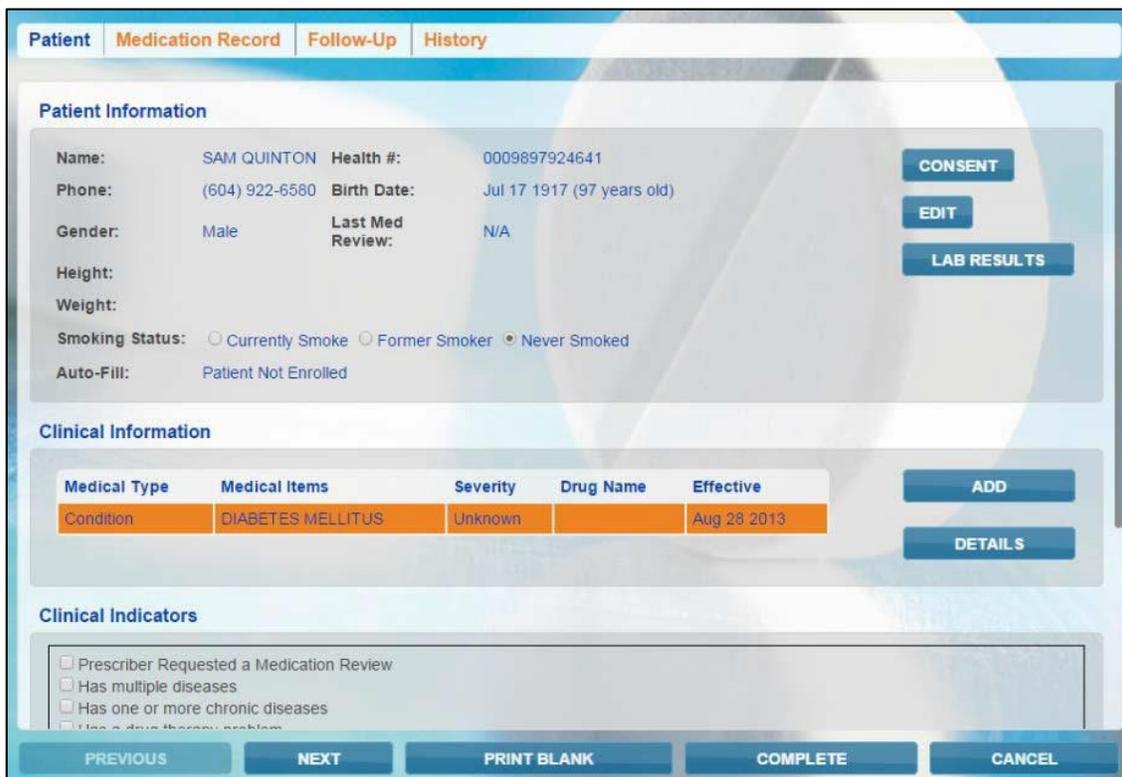
The Patient Centre App provides your pharmacy access to all patient focused services, such as the Medication Review App and Flu Injection. The Patient Centre App can be accessed by selecting the  icon from the Workbench.

Medication Review Module

The Medication Review Module helps to conduct a patient medication review quickly with minimal paperwork. You can complete the medication review from PharmaClik Rx and/or from a mobile device connected to PharmaClik Rx Wi-Fi. When using the Medication Review App on a mobile device, most of the information that is added and/or removed will be automatically updated in PharmaClik Rx in real time.

The Medication Review does not interact with the NB DIS. All changes made in the Medication Review are saved locally to PharmaClik Rx only; **users must manually transmit the information** from PharmaClik Rx to the DIS, such as an address or demographic change.

With the addition of the DIS, some write back features have been disabled due to the messages that need to be transmitted to the DIS. For example, **Discontinuing an Rx** will not be available in the Medication Review for pharmacies in New Brunswick at this time. (The user will need to go back into the patient’s profile to discontinue the Rx in order for it to transmit to the DIS).



The screenshot displays the 'Medication Record' tab for a patient named SAM QUINTON. The interface is divided into three main sections: Patient Information, Clinical Information, and Clinical Indicators.

Patient Information: Includes fields for Name (SAM QUINTON), Health # (0009897924641), Phone ((604) 922-6580), Birth Date (Jul 17 1917 (97 years old)), Gender (Male), Last Med Review (N/A), Height, Weight, Smoking Status (radio buttons for Currently Smoke, Former Smoker, Never Smoked), and Auto-Fill (Patient Not Enrolled). Action buttons for CONSENT, EDIT, and LAB RESULTS are visible.

Clinical Information: A table lists medical items with columns for Medical Type, Medical Items, Severity, Drug Name, and Effective. One entry is shown: Condition, DIABETES MELLITUS, Unknown, Drug Name, Aug 28 2013. Action buttons for ADD and DETAILS are present.

Clinical Indicators: A list of checkboxes for various indicators, including 'Prescriber Requested a Medication Review', 'Has multiple diseases', and 'Has one or more chronic diseases'.

At the bottom, navigation buttons include PREVIOUS, NEXT, PRINT BLANK, COMPLETE, and CANCEL.



During the medication review, any changes made to information that also resides on the DIS **must** be updated in both places.

Since there is no interaction between the Medication Review and the NB DIS, only prescriptions that are local in PharmaClik Rx will be displayed when a medication review is conducted. As a result, it is highly recommended that you view the patient's **EHR** profile prior to beginning a medication review to familiarize yourself with all of the patient's medications.

When information is modified in the Medication Review, a note will be visible to users to serve as a reminder that this information will not be transmitted to the DIS, as shown below:

Patient Information ✕

First Name: <input type="text" value="SAM"/>	Last Name: <input type="text" value="QUINTON"/>
Health#: <input type="text" value="0009897924641"/>	
Phone: <input type="text" value="604-922-6580"/> <small>(### ### ####)</small>	Birth Date: <input type="text" value="07/17/1917"/> <small>(mm/dd/yyyy)</small>
Gender: <input type="text" value="Male"/>	
Height: <input type="text" value="0"/> ft <input type="text" value="0"/> inches	<input type="text"/> cm
Weight: <input type="text" value="0"/> lbs	<input type="text"/> kgs
Auto-Fill Enrollment: <input type="text"/>	Decline Reason: <input type="text"/>
	Employee ID #: <input type="text"/>

Patient Information will only be added locally. To transmit this information to the Patient's Electronic Health Record, please use the Compare button in PharmaClik Rx.

The Medication Review will continue to update PharmaClik Rx locally when any of the following information is modified/updated:

- Patient Clinical Information (i.e. allergies)
- Drug Utilization Record (DUR) (i.e. vitamin c)
- Patient Notes
- Inactive Prescriptions

Flu Injection Module

The Flu Injection module allows pharmacies a quick and paperless way to obtain a patient signature or verbal consent for a flu injection, either on an iPad or workstation, as well as process flu prescriptions. The Flu Consent button permits a pharmacy to electronically enter patient consent (or parental consent for a child) before administering the flu injection. Users can access the flue consent either by selecting **Rx > Services > Flu Injection > Flu Consent** or by launching the Patient Centre App Workbench and selecting the Flu Injection button.

With the addition of the DIS, some write back features have been disabled due to the messages that need to be transmitted to the DIS. For example, **any patient demographic information** will be transmitted locally to PharmaClik Rx only.

NOTE: Prior to completing any flu services (i.e. flu consent or flu prescription), you must make sure the patient is synchronized.



The Flu Injection Module does not interact with the NB DIS. All changes made while completing a Flu Consent are saved locally to PharmaClik Rx only; users must manually transmit the information from PharmaClik Rx to the DIS, such as an address or demographic change.

A note will be visible at the bottom of the screen to serve as a reminder that any information changed during the flu consent will be updated locally in PharmaClik Rx only and not be transmitted to the DIS, as shown below:

Patient Information

Last Name: <input type="text" value="SMITH"/>	First Name: <input type="text" value="BLACK"/>
Health#: <input type="text" value="85207785"/>	Gender: <input type="text" value="Male"/>
Birth Date: <input type="text" value="01/01/2001"/>	Age: <input type="text" value="15"/>

Address

Phone: <input type="text" value="(506) 555-1234"/>	
Addr Line 1: <input type="text" value="131 MCNABB"/>	
Addr Line 2: <input type="text"/>	
City: <input type="text" value="Moncton"/>	Province: <input type="text" value="NB - New Brunswick"/>
Postal Code: <input type="text" value="E1E1E1"/>	Country: <input type="text" value="Canada"/>

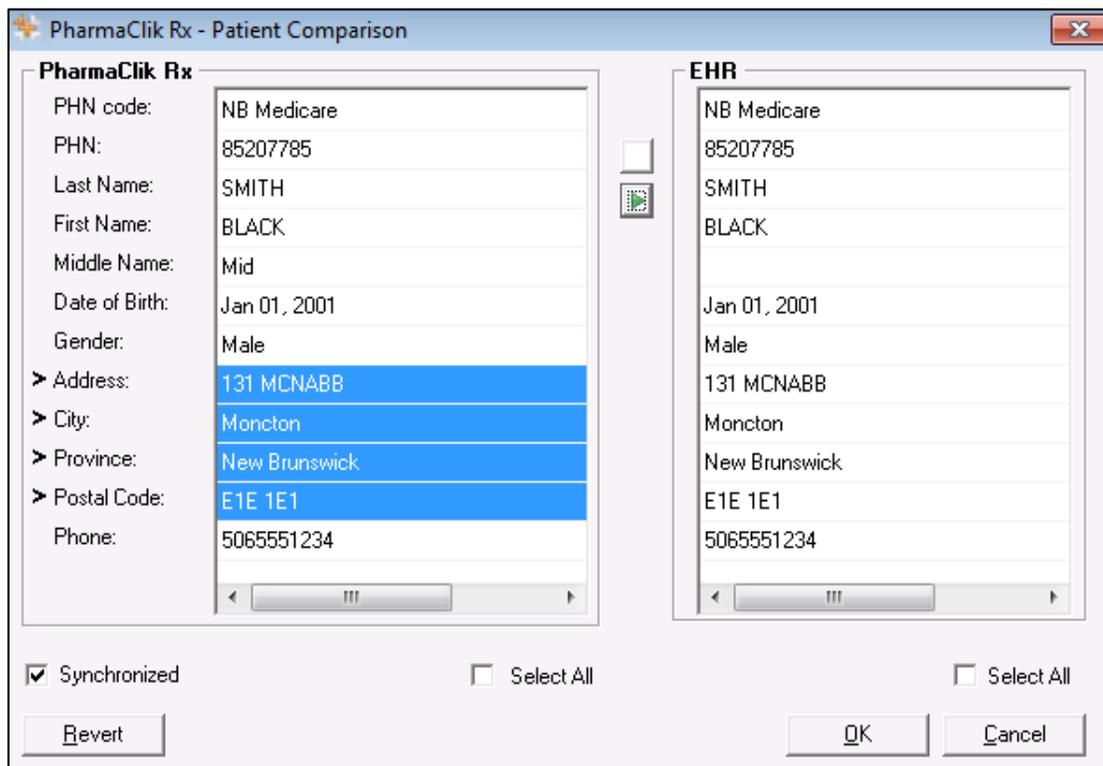
Patient Information will only be added locally. To transmit this information to the Patient's Electronic Health Record, please use the Compare button in PharmaClik Rx.

Updating the DIS with Information Modified During a Patient Focused Service

If any information that resides on the Client Registry (i.e. patient demographic information, clinical information, etc.) was updated during a medication review or flu consent, you must ensure you transmit the changes to the DIS. In order to do this you must use the Patient **Compare** button within the Main tab of the Patient Folder.

To update the DIS with patient information updated during a Patient Focused Service, do the following:

1. Immediately after completing the patient focused service, open the Patient Folder for the patient whose information was modified.
2. Select the **Compare** button.
3. Use the directional arrow  to highlight the changed information from PharmaClik Rx section to the EHR section.



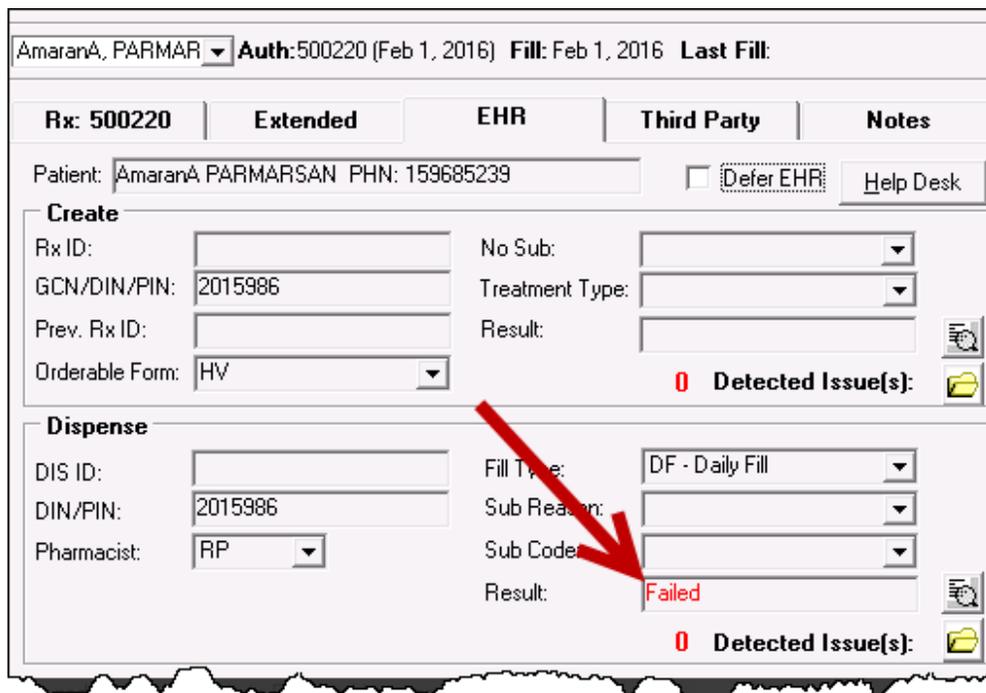
Field	PharmaClik Rx	EHR
PHN code:	NB Medicare	NB Medicare
PHN:	85207785	85207785
Last Name:	SMITH	SMITH
First Name:	BLACK	BLACK
Middle Name:	Mid	
Date of Birth:	Jan 01, 2001	Jan 01, 2001
Gender:	Male	Male
Address:	131 MCNABB	131 MCNABB
City:	Moncton	Moncton
Province:	New Brunswick	New Brunswick
Postal Code:	E1E 1E1	E1E 1E1
Phone:	5065551234	5065551234

Synchronized
 Select All
 Select All

4. Select the **OK** button.

Completing a Patient Focused Service for an Unsynchronized Patient

If a medication review or flu injection service is completed for a patient that is not synchronized, the Rx will not be transmitted to the DIS; it will be placed into the In Process Tab with a status of "Incomplete". If you open the prescription in **Rx Detail > EHR** tab, the Dispense information will display *Failed*, as shown below:



AmaranA, PARMAR Auth:500220 (Feb 1, 2016) Fill: Feb 1, 2016 Last Fill:

Rx: 500220 Extended EHR Third Party Notes

Patient: AmaranA PARMARSAN PHN: 159685239 Defer EHR Help Desk

Create

Rx ID: No Sub:

GCN/DIN/PIN: 2015986 Treatment Type:

Prev. Rx ID: Result:

Orderable Form: HV **0 Detected Issue(s):** 

Dispense

DIS ID: Fill Type: DF - Daily Fill

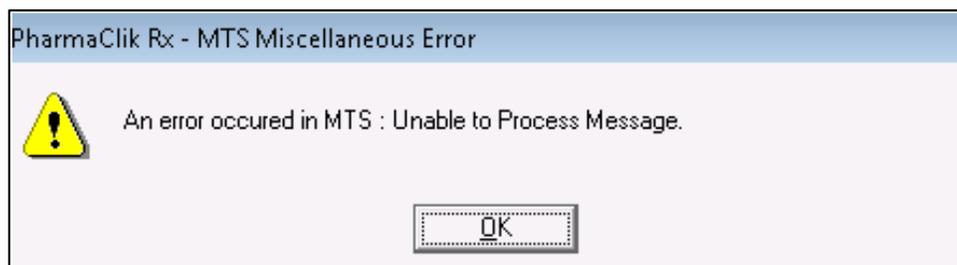
DIN/PIN: 2015986 Sub Reason:

Pharmacist: RP Sub Code:

Result: **Failed** 

0 Detected Issue(s): 

Selecting the magnifying glass icon  located next to the *Failed* result will display the following prompt:

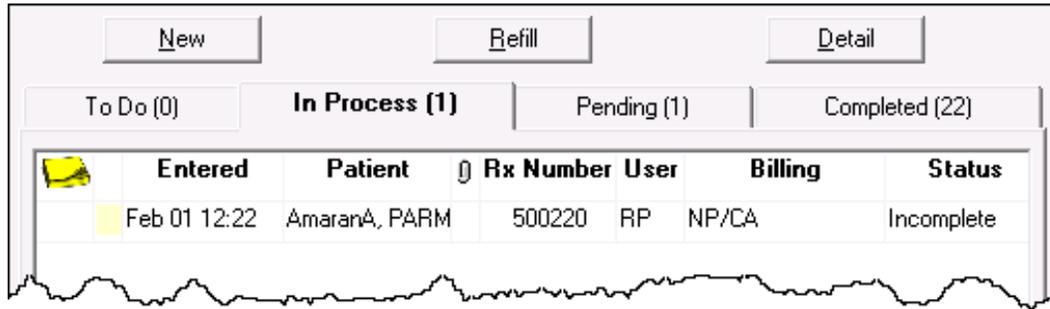


PharmaClik Rx - MTS Miscellaneous Error

 An error occurred in MTS : Unable to Process Message.

In order to transmit this Rx to the DIS, you must synchronize the patient by doing the following:

1. Navigate to the **Workbench > In Process** tab.
2. Highlight the patient focused service.



New		Refill		Detail		
To Do (0)		In Process (1)		Pending (1)		Completed (22)
	Entered	Patient	Rx Number	User	Billing	Status
	Feb 01 12:22	AmaranA, PARM	500220	RP	NP/CA	Incomplete

3. Select the **Detail** button. The prescription will open in Rx Detail.
4. In the Main tab of Rx Detail, select the Patient Folder  icon. The Patient Folder will open.

NOTE: The Patient Folder icon will be red, indicating that the patient is not synchronized with the Client Registry.

5. Ensure the patient's **PHN** is entered in the *PHN* field.
6. Select the PHN Expand  icon.
7. Proceed to synchronize the patient. For more details regarding possible patient synchronization scenarios, see the [Searching for & Synchronizing a Patient](#) section.
8. Once synchronized, select the **Fill** button to resubmit the claim.

Housekeeping

Nullifying Patients

The New Brunswick DIS permits pharmacies to ‘nullify’ synchronized CR records submitted by their own pharmacy. Nullifying a patient means that the patient folder was synchronized with the CR in error. Nullifying a CR patient is only permitted when the patient has had no activity with the DIS.

PharmaClik Rx will initiate the nullify patient process when a synchronized patient status is changed to ‘Inactive’. When the nullified patient process is successful, the **Synchronization** checkbox will be unchecked, the patient status will be *Inactive*, and a Patient History row will be added, as shown below.

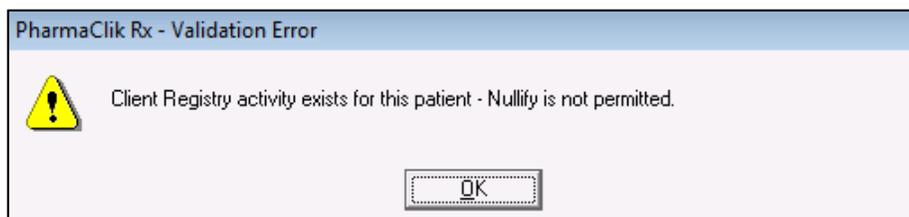
Entered	User	Event	Activity	Comments	Private
Feb 22, 2016 00:57	RP	Patient Status Changed	Active to Inactive		<input type="checkbox"/>

Nullifying a patient will not be permitted if:

- The Patient Folder has never been synchronized; or
- Prescriptions exist that have been transmitted to the DIS

NOTE: If a patient is added in error, a note should be added in the patient’s Notes tab to indicate the patient was added in error.

When a synchronized patient status changes from an *Active* status to *Inactive*, PharmaClik Rx will validate if the Patient Nullify message can be transmitted. If any DIS clinical or prescription history exists, the following prompt will display:

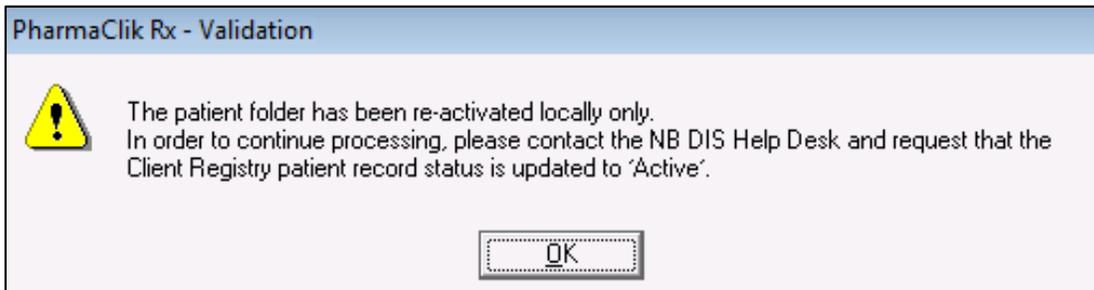


To nullify a patient, do the following:

1. Open the Patient Folder in PharmaClik Rx.
2. From the *Status* dropdown field, select **Inactive**.
3. Select the **Save** button.

Reactivating a Nullified Patient

When a user changes the **Status** from 'Inactive' to 'Active', PharmaClik Rx will evaluate if the Patient Folder has been previously 'nullified'. If the patient folder was previously nullified, the following prompt will display:



You must contact NB DIS Help Desk in order to add this patient back to the Client Registry.

NOTE: It is highly recommended that you do not reactivate a nullified patient and instead, create a new patient profile for him or her.

Merging Patients

When a patient merge is performed, one patient will be removed from the database and the other will be retained. The Patient Folder for the patient who is retained will include all of the information from the patient that was removed.

The Patient Merge window is separated into two sections: *Target* and *Remove*. Target contains the information for the Patient Folder that will remain and into which all of the other Patient Folder data will be merged. Remove contains the information for the Patient Folder which will be merged into the Target Patient Folder.

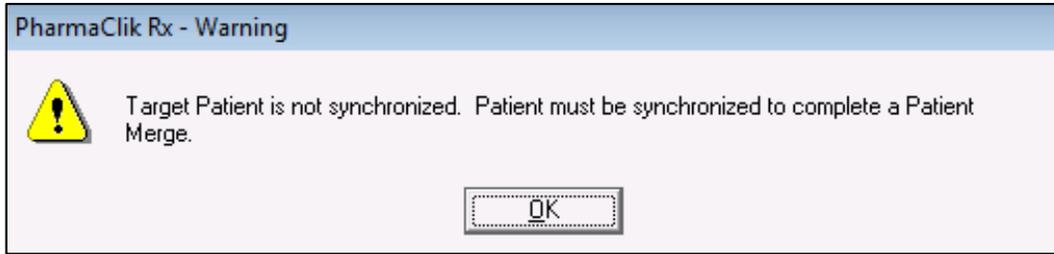


It is imperative to keep your patients records accurate and up to date. Ensure prior to synchronizing any patients that you confirm the patient is not in the local system more than once.

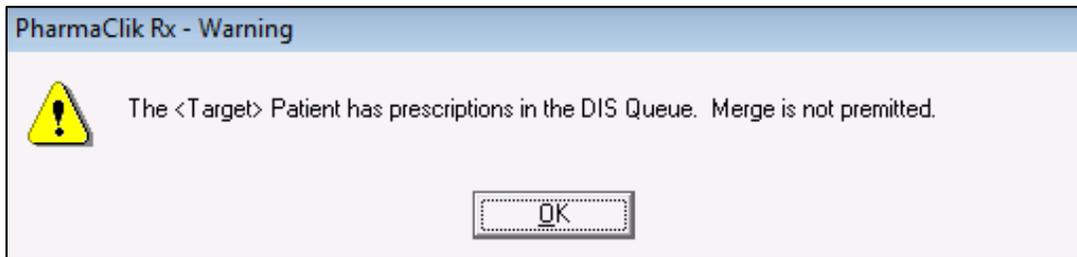
Only users with DIS Access are permitted to merge patients. Any users that do not have DIS Access, will be prompted with the following validation:



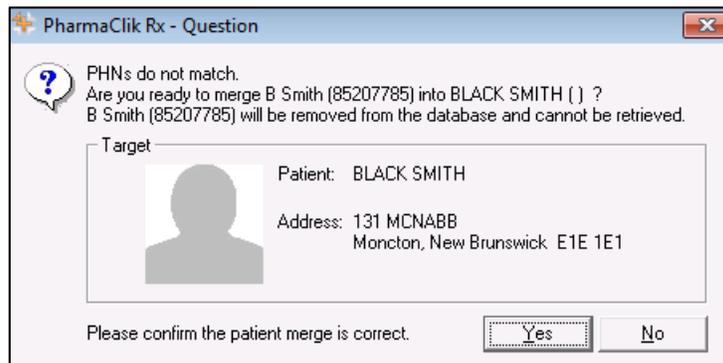
If you are merging 2 patients but only 1 patient is synchronized, the Target patient selected must be the synchronized patient. If the Target patient selected is not synchronized, but the Remove patient is, the following prompt will appear:



If you are merging 2 patients and the Target patient has pending prescriptions in the DIS Queue, the following prompt will appear:



If you are merging 2 patients but the PHNs on file do not match for both of the patients, the following prompt will appear:

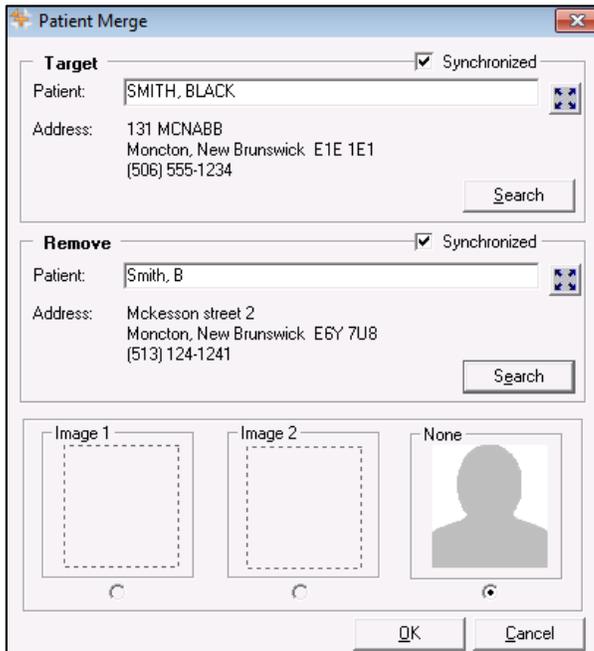


NOTE: In this scenario, you must validate why the 2 patients have different PHNs. **DO NOT** merge patients without checking!

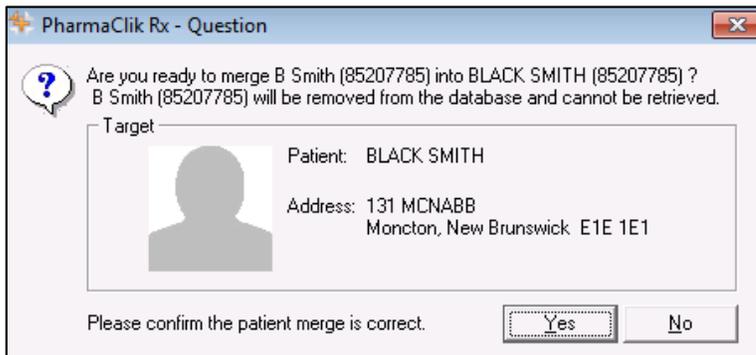
To merge two Patient Folders, do the following:

1. Select **More > Housekeeping > Merge > Patient**. The 'Patient Merge' window appears.
2. In the Target section, enter all or part of the name of the patient you wish to keep.
3. Select the **Search** button.
4. From the results returned, highlight the correct patient.
5. Select the **OK** button.
6. In the Remove section, enter all or part of the name of the patient you wish to remove from the database.
7. Select the **Search** button.
8. From the results returned, highlight the correct patient.

9. Select the **OK** button.

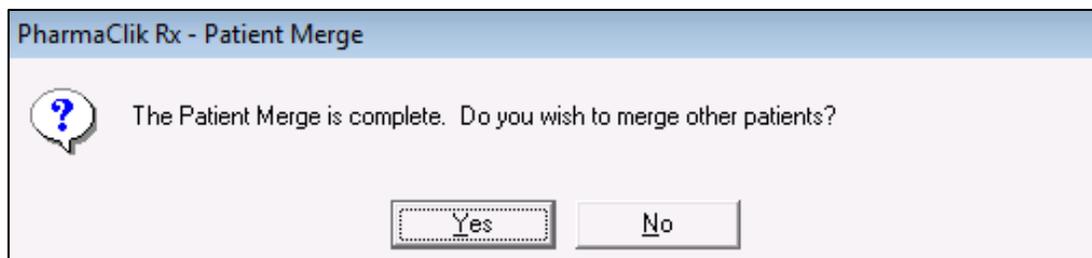


10. Verify that the **Target** and **Remove** patients are correct and select the **OK** button. A validation prompt appears to confirm the merge.



11. Select the **Yes** button.

PharmaClik Rx will perform the merging of the two Patient Folders. Depending on the size of the patient files, the merge can a few minutes to complete. Once the merge is complete, a prompt will appear indicating the merge was successful.



Unmerging Patients

If you have completed a Patient Merge and have determined that this Merge was completed in error, you must contact our Customer Care team at **1-800-387-6093** or by email at ptscustomercare@mckesson.ca. You will be requesting that an unmerge of the Patient Folders and will be required to identify the following:

- Target patient's name
- Birth Date
- Gender
- Address

The Unmerge does not support the unmerge of Patient Focused Services that were merged with a patient. You must ensure that when merging patients, you are confident you will not need to unmerge as any patient focused services created will remain on the Target patient profile.

Help Desk Support

For assistance in troubleshooting any issues you may encounter, contact the appropriate Help Desk as outlined below.

NOTE: Personal health information (PHI) should never be included in an email or disclosed over the telephone to the service desk. Only the context of the problem being encountered should be referenced, not the specific patient data.

Government of New Brunswick Service Desk

If you detect an issue with the New Brunswick DIS, contact the Government of New Brunswick (GNB) Service Desk immediately at **1-844-250-5250**. If the GNB Service Desk cannot help you immediately without having to contact the support team, someone will get back to you within 1 hour. The GNB Service Desk can assist with the following:

- Issues/questions about access to the Electronic Health Record (EHR) or its content;
- Issues/questions related to online training access or courses available (Health Learning Center);
- Issues accessing the DIS Portal (New access requests, password changes, etc);
- Issues accessing the Sharepoint Pharmacy Task Management;
- Privacy questions or concerns;
- Issues related to record management including solving data quality issues (review identifier, potential duplicates, etc.), view/update Client Registry tasks in the SharePoint work list to manage tasks (data quality issues);
- Issues related to registering a new client and related to data entry or any registration and data integrity questions or issues;
- Questions related to the Prescription Monitoring Program (PMP);
- Providing any information regarding the addition of a new staff member in the pharmacy.
- Any technical software issues that seem to be originating from the DIS – database errors,
- Issues related to business rules related to dispensing medication: prescription completed, no remaining quantity etc.
- Communication errors such as *Remote name could not be resolved (DHWS1.gnb.ca)*.

You must provide the following details:

- PID #
- NB College of Pharmacists pharmacy certificate or operation # (located at the bottom of the pharmacy license displayed at your store)
- Contact Name
- Contact Phone Number
- Description of the problem

PharmaClik Rx Customer Care

If you detect an issue with PharmaClik Rx, contact our PTS Customer Care team immediately. The PharmaClik Rx Customer Care team can assist with the following:

- Issues such as prescriber or provider errors (e.g. provider not found or terminated). Usually this means the prescriber is not properly configured with the correct license #
- Communication errors where the issue seems to be larger in scope than just connectivity with the DIS (e.g. adjudication to third party payors is failing);
- Any other technical software issues related to PharmaClik Rx.

You must provide the following details:

- PID #
- Contact Name
- Contact Phone Number
- Description of the problem

Once a ticket is opened, the PTS Customer Care representative will provide you with a Remedy incident number. Record this incident number in order to quickly reference your issue in the future.

Customer Support

Our dedicated Customer Care team supports you and your pharmacy.



Contact Us

 **1.800.387.6093**

 ptscustomer@ckesson.ca

- Hardware or Technical Support - **Press 1**
- PharmaClik Rx Support - **Press 2**
- PharmaClik POS Support - **Press 3**
- Sales or To Order Supplies - **Press 5**
ptssales@ckesson.ca

Our Customer Care Hours

Monday – Friday: 7:00 am - 10:00 pm ET

Saturday: 9:00 am - 5:00 pm ET

Sunday: (PharmaClik Rx only) 9:00 am - 5:00 pm ET

After Hours Support: Critical Calls Only

Helpful Links

After DIS integration, it is important that your pharmacy is informed and up to date regarding any changes made to the New Brunswick DIS. The following links have been provided as reference sites that your pharmacy will find useful:

- [New Brunswick Health](#)
- [Canada Health Infoway](#)
- [Health Canada](#)
- [National Association of Pharmacy Regulatory Authorities](#)
- [Canadian Pharmacists Association](#)
- [Patented Medicine Prices Review Board](#)

In order to access these reference sites as quickly as possible, you can create shortcuts on your desktop to the websites posted above. To create a shortcut through Internet Explorer (IE):

1. Open your IE browser.
2. Navigate to the page you would like to create a shortcut for (one of the websites indicated above).



3. Right-click on an empty space on the website.
4. Select the **Create Shortcut** option that appears in the menu.



5. A validation prompt appears confirming the shortcut creation. Select the **Yes** button. A shortcut will appear on your desktop.
6. Repeat Steps 2-5 for the remaining websites indicated above.