

# Nova Scotia Drug Information System (DIS) User Guide





# **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
November 25, 2015	Addition of PharmaClik Rx 1.5 Hot Fix 1 Changes
December 11, 2015	Page 117: Prescription Scenario "First Fill of an Inferred Rx"
January 11, 2016	Page 86: Updated PMP Opinions PIN for Testosterone Powder
October 18, 2016	Addition of PharmaClik Rx 1.8 NAPRA Changes
June 01, 2017	Page 140: Addition of "Time Limit for Retract Has Expired"
September 6, 2018	Page 66: Addition of "Adding a New Immunization"
July 7 2019	Page 98-101: Moved the "Groups Folder" topic after "Location Registry Search". Updated content in Filling a Pharmacy-to- Pharmacy Transfer Prescription.
July 4, 2023	The following updates were made in accordance with PharmaClik Rx 2.5.2 HF5 Patch 4 changes: Page 25: Updated DIS Pickup settings for non-POS and POS integrated stores. Page 66: Addition of mandatory step to add lot number and expiry date for immunizations. Page 123 - 124: Addition of "Transferring a Prescription Out of Province"
July 5, 2024	Page 117 – 118: Updated prompts for cancelling a First-Fill



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# 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 **Crtl + 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 + Crtl + 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 Nova Scotia 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 Nova Scotia Drug Information System (DIS) is an electronic system that allows authorized health care providers to access, manage, share and protect medication information. When an authorized health professional provides health care to a patient, the DIS will allow them to have access to the patient's electronic health record (EHR). The 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.

Some of the benefits of implementing the DIS in Nova Scotia include:

- An overall profile of a patient's medication information.
- Fewer adverse or bad drug reactions.
- Detection of potential drug-to-drug interactions.
- Sharing of information between authorized health care providers.
- Avoiding duplication of medications.

PharmaClik Rx has worked closely with the Nova Scotia Department of Health and Wellness 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 Nova Scotia DIS using PharmaClik Rx.

## **Client Registry**

The Client Registry (CR) is a component of the Nova Scotia 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 encounter (i.e. prescription order/dispense, recorded drug allergy/intolerance or adverse drug reaction, etc.) in the province by community and hospital-based providers.

## Pharmaclik RX

# Provider Registry

The Provider Registry provides a single 'source of truth' for identification, demographic and credential information of health service providers supporting the EHR in Nova Scotia by:

- Providing reliable and accurate provider demographic and credential information for health service systems; and,
- Linking local provider identifiers from the trusted sources of provider information within the Provider Registry to allow a single, ubiquitous identifier for that individual for all health service events.

## Synchronization

For any interaction to occur with the DIS, a patient's information in PharmaClik Rx must be synchronized with the Client Registry (i.e. filling a prescription, adding an allergy etc.). Synchronization ensures that the correct patient is selected and allows the patient information maintained on the CR to be accurate. You will know whether a patient's profile is synchronized as there will be a checkmark displayed in the main tab of the Patient Folder, as displayed below.

McKesson, E	3rd Party	Clinical	Profile	History	Consult	Preferences	Ø	Notes
Synchroniz	Synchronized Patient Mode							
Last Name: Mck	Kesson		Birth Dat	e Jan 01, 1	980 Age	: 35 Last Rx:	Jan 1	4, 2015
First Name: Elvis	s Bob		Gender:	Male	▼ PHI	N: 123456789		52
Mid Name:	Title:	Mr. 💌	Status:	Active	▼ Pat	#:		

If you attempt to transmit information to the DIS for a patient that has not been synchronized, the following validation will be displayed:

PharmaC	lik Rx - Patient Maintenance
8	Patient is not Synchronized. Synchronization is required.
	<u>O</u> K



# Glossary of Terms

Terminology	Translation		
Adverse Drug Reaction (ADR)	<ul> <li>Any adverse event associated with the use of a drug, whether or not considered drug related, including the following:</li> <li>An adverse event that can occur after using a drug.</li> <li>An adverse event occurring from drug overdose.</li> <li>An adverse event occurring from drug withdrawal.</li> </ul>		
Animal	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. Prescriptions for animals are not transmitted to the DIS.		
Client Registry	A comprehensive registry of residents and other individuals who have had a health service in Nova Scotia that contain patient client demographic information. This information can be reviewed by all users that have DIS Access.		
Consent	For a health professional to view a patient's EHR data that has been masked, consent override must be provided.		
Create and Dispense	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). The Dispense is the act of dispensing the prescription.		
Detected Issue	The list of clinical conflicts that have been detected and recorded involving a patient's drug administration.		
Device	An instrument, apparatus, implement, machine, contrivance, implant, in vitro reagent, or other similar or related article, including any component, part, or accessory.		
	<b>NOTE:</b> Nova Scotia requires devices transactions be transmitted to the DIS by using an Opinion PIN.		
Drug Information System (DIS)	A single, secure repository where health professionals can view all the drugs dispensed to patients by a community pharmacy, regardless of the location or prescriber.		
Electronic Health Record (EHR)	A patient medication profile that resides on the DIS. The EHR checkbox throughout PharmaClik Rx indicates whether the information resides on the DIS.		
Issue Management	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).		



Terminology	Translation		
Masked	Indicates that a patient profile has been protected from viewing. To view a masked record the health professional must get express consent to provider override consent.		
Other Medication Record	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.		
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 Nova Scotia DIS just like an Active status patient.		
Patient Medication Profile	The portion of a patient's record that contains specific information regarding drug therapy. The profile includes all medications prescribed and dispensed for a patient. Note: The DIS is a go-forward system and will contain information as it is contributed to the DIS.		
Personal Health Number (PHN)	A unique identification number assigned to a resident of a province. This number is used to store and retrieve all persona information, including their demographics, medication history and eligibility for publicly funded health care.		
	<b>NOTE:</b> In Nova Scotia the patient health care number is called the Nova Scotia Health Care Number and throughout PharmaClik Rx it is referred to as PHN.		
Pharmacist ID	Pharmacist Identification number refers to the dispensing Pharmacist's license number.		
Pickup	It is important that claims are marked 'Picked Up' in PharmaClik Rx at the time the customer physically picks up the medication. Pickup identifies that the prescription is in the patient's possession. This can be set in <u>DIS Preferences</u> .		
	<b>NOTE:</b> For pharmacies set up for POS Integration, the pickup will be performed at the time the prescription has been scanned at the register.		
Synchronized	When local patient information, including drug therapy, is synchronized with the information on the CR.		
Office Supply	An office supply is when a pharmacy sells a drug to a doctor's office, dentist office, clinic, etc. These transactions must be transmitted to the DIS using the Stock Supply functionality as outlined in the User Guide.		



Terminology	Translation
Stock Transfer	A pharmacy to pharmacy stock transfer is when your pharmacy supplies another pharmacy with a drug (ie: bottle of 100 amoxicillin 500mg capsules). Pharmacy to Pharmacy transfers technically do not need to be transmitted to the DIS, but it would be best to use the same functionality for both the Office Supply and Stock Transfer, to avoid confusion.



# Managing User Accounts (Security Window)

PharmaClik Rx supports role-based access control, allowing different users to have different levels of access depending on their job. For example, certain users can be authorized to view prescriptions but not 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 may otherwise occur if each type of access or service had to be directly mapped to each 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 accessed through the Security button within the More menu. The Security window is broken into two tabs: <u>Users tab</u> and <u>Role Types</u> 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.

Any new users added will have permissions based on their role type. 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.

Your pharmacy can modify the default folders and windows each role type has access to, as well as create custom role types.



# 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 opens.

🍀 PharmaCli	k Rx - Security Login		x
System Tim	e: Jun 2, 2016-11:29am		
User:	adm	OK	
Password:	******	Cancel	

- 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 opens.

Securi	ty Admin	istration Facility					
		Users			Role Typ	)es	
Lock	Initials	First Name	Last Name	Ro	le	License/ID#	4
	PB	Pravneet	Bilkhu	Pharmacist		147258369	h
	PP1	Smith	John	Pharmacy Te	chnician	111202	۲
•						•	-
Narco	otic Code	Password	DIS Passwor	d <b>*(</b>	Customized	<ul> <li>Default Acc</li> </ul>	e
User	Informal	ion					
Start	date:		End date:				
	(	ieneral Access			Report Acc	ess	
		Description		Full Access	Read Only	y No Access	
Activ	rities						
DIS	Access			<b>V</b>			
Doct	or Folder			<b>v</b>			
Drug	Folder			<b>v</b>		Π.	-
•						Þ	
۵de	t Ber		Unlock		Save	Pouert Fuit	

**NOTE:** 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 <u>Setting Up Users with</u> Administrator Security Access.



### Users Tab

The Users tab permits 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.

		Users			Role Type	es	
Lock	Initials	First Name	Last Name	Ro	le	License/ID#	-
	AC	Annette	Colleen	Accountant			(
	ADM	Administrator	System	Administrator			
•							
`	K. C. J.	Decement	1 DIC D	. 1		Defection de	
<u>IN</u> arco	NIC LODE		DIS Passwor			Jerault Ac	CE
User	Informat	ion ———					_
Start	date:		End date:				
			1		<b>D</b> 14		_
	C C	ieneiai Access	L		Report Acce	228	
		Description		Full Access	Read Only	No Access	*
Activ	ities						
	Access					<b>v</b>	
DIS /	or Folder			<b>V</b>			
DIS / Doct				<b>v</b>			÷
DIS / Doct Drug	Folder						



#### 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 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, 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. 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.

Securit	y Admin	istration Facility					2
		Users			Role Typ	bes	
Lock	Initials	First Name	Last Name	Ro	le	License/ID#	*
	PP1	Smith	John	Pharmacy Te	chnician	111202	
	PRE	Preet	Patrick	Pharmacist		111202	
• Narcol	tic Code	Password		a 1 ==	ustomized	► Default Ac	
User Information Start date: End date: General Access Report Access							
		Description		Full Access	Rend Only	y No Access	*
Pha	irmacy Pri	cing					
Sus	tem Settin	as			-		
Secu	irity Fold	ler					
WOIK	now Statu	15					Ŧ
•			III			•	
Add	<u>R</u> en	nove <u>C</u> opy	<u>U</u> nlock		<u>S</u> ave	Re <u>v</u> ert E <u>x</u> it	t

6. Select the Save button.



#### Setting Up Users with DIS Access

All PharmaClik Rx users must be registered and have an active account with eHealth Nova Scotia in order to have ability to submit transactions from within PharmaClik Rx to the DIS. In order to set up a user with DIS Access in PharmaClik Rx, the administrator (ADM) user, or a user with administrative access, must log into PharmaClik Rx and grant DIS Access.

Once this is done the **DIS Access** checkbox in the Users tab will be selected, indicating you now have DIS Access, as shown in the image.

To set up a user with DIS Access within PharmaClik Rx:

- 1. Log into PharmaClik Rx as the administrator (ADM), or a user with administrative rights.
- 2. Select More > Security.
- 3. From the Users tab, highlight the name of the user you wish to grant DIS access to.
- 4. Validate that the license # is entered in the correct format. This is imperative in order to submit transactions to the DIS.
- 5. In the General Access tab, scroll down until you find the **DIS Access** row.
- 6. Select the **Full Access** checkbox for the DIS Access row.
- 7. Select the **Save** button. This user will now have the ability to submit transactions to the DIS.

		Users			Role Ty	pes	
.ock	Initials	First Name	Last Name	Ro	le	License/ID#	-
	PP1	Smith	John	Pharmacy Te	chnician	111202	
	PRE	Patrick	Richard	Pharmacist		111202	μ
	PST	Pharm	Student	Pharmacy Stu	ident	123123	
<u>N</u> arco	otic Code	<u>P</u> assword	DIS Passwor	d		🔽 Default Ac	ces
Start	date:		End date:				
	(	General Access			Report Ac	cess	
_	(	General Access		Full Access	Report Ac	cess Ily No Access	*
Activ	( rities	General Access Description	]	Full Access	Report Ac	cess Ily No Access	•
Activ DIS	( ities Access	General Access		Full Access	Report Ac	cess	•
Activ DIS Doct	( vities <b>Access</b> or Folder	General Access		Full Access	Report Ac	cess	•
Activ DIS Doct	rities Access or Folder Folder	General Access		Full Access	Report Ac	cess	*



#### **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 <u>must</u>:

- Be a minimum of eight (8) characters long.
- Contain one character from <u>all</u> 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 sample passwords that meet the 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.

💠 Change Password	×
Old Password: New Password: Confirm New:	<u>O</u> K <u>C</u> ancel

**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

- 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.

#### **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) 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 <u>do not</u> 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, 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. This user must be the Administrator (ADM) or have administrator rights.
- 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.



03613				Role Types		
ock	Initials	First Name	Last Name	Ro	le	License/ID#
	SD	Stephanie	Dimovski	Pharmacy Ma	anager	111202
L.	SK	Scott	Kayes	Pharmacist		111202
						Þ
<u>N</u> arco	tic Code	<u>P</u> assword	DIS Passwor	d <b>*(</b>	Customized*	🗖 🔲 Default Acc
lser	Informat	tion	·			
Start	date:		End date:			
oran	aato. j	<u></u>	Ena dato.		and the second se	
			,			
	(	General Access			Report Acc	ess
	(	General Access Description		Full Access	Report Acco	ess No Access A
Activ	( rities	General Access Description		Full Access	Report Acco	ess No Access
Activ DIS /	( ities Access	General Access Description		Full Access	Report Acco	ess No Access
Activ DIS / Doct	ities Access or Folder	General Access Description		Full Access	Report Acco	ess
Activ DIS / Doct Drug	rities Access or Folder Folder	General Access Description		Full Access	Report Acco	ess

- 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.

- 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.

特 PharmaClik Rx Vers	ion 1.8.0.0.188 Login		<b>—</b> ×-
System Time: 1	May 31, 2016 2:13pm		
User:	РВ		OK
Password:	******		Exit
DIS Password:	*****		
Pharmacist:	РВ	-	
	Save Login Information	Databas	e Version 7.8 - 85

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

PharmaClik Rx	x
Please enter a new password.	
ОК	

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

### Pharmaclik RX

#### **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.

		Users		/ Role	e Types
Lock	Initials	First Name	Last Nan	Role	License/ID#
	TT	Tom	Tiny 📕	Pharmacist	37001
	TM	Tracy	Meagher	Pharmacist	296431

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

To remove 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 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.

PharmaC	lik Rx - Security Administration
?	Are you sure you would like to remove this user from the list?
	Yes No

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

## Pharmaclik RX

#### 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:

Securit	ty Admin	istration Facility				
		Users		Role Ty	ypes	
Lock	Initials	First Name	Last Name	Role	License/ID#	*
	JSL	Jack	Larry	Pharmacist	111202	
L	TT	Tom	Tiny 🔨	Pharmacist	37001	
						-
٠ 📃					- F	
<u>N</u> arco	tic Code	Password	DIS Password	*Customize	d* 🔲 Default Ac	cess
,u~,	~~~~	in the second	$\sim$	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	~~ <u>~</u> _/~~	~~~

**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 <u>Resetting Users to</u> <u>Default Access</u> for more information.

To customize General or Report Access for a specific 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 user 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, No Access).



6. 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).

General Access		Report Acces	s
Deperation	Full Access	Read Only	No Access
Housekeeping			<b>•</b>
Merge			
Purge			<b>V</b>
Inventory			Π.
•			- F
Add Bemove Copy Unlock		Save Re	event Exit

- **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.
- 7. 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, 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.
- 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.

	y Admin	istration Facility	1		
		Users		Role Ty	pes
Lock	Initials	First Name	Last Name	Role	License/ID#
	PP1	Smith	John	Pharmacy Technician	111202
	PRE	Preet	Patrick	Pharmacist	111202
					· · ·
Marcotic Code         Password         DIS Password					
<u>N</u> arco	tic Code	Password	DIS Password		Default Acce

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.



Users		Role Typ	bes
Description	Active	Custom P	harmacist Role 🔺
Administrator			
countant	<b>V</b>		
Community Care Nurse			
Community Nurse Practitioner			
Custom Pharmacist			
Custom Technician			
)ispensing Nurse			Π.
General Access		Report Acc	ess
Description	Full Access	s Read Only	V No Access A
Activities			V 🗌
DIS Access			
Doctor Folder			
Drug Folder		<b>v</b>	
	11		•

#### 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.
- 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).



Users		Role Typ	es	
Description	Active	Custom Pł	armacist Rol	e 🔺
Dispensing Nurse				
)ispensing Physician				
nventory Clerk				
aboratory Technicia				
lurse				
lurse Hospital				
lurse Practitioner Hospital				-
< [				
General Access		Report Acce	88	
Description	Full Access	Read Only	No Access	*
Activities				
DIS Access				
Doctor Folder		✓		
Drug Folder				-
			•	

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

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.

Users		Role Types		
Description	Active	Custom	Pharmacist Role	
Physician Emergency				
Physician Office Staff				
Physician Specialist				
Provider				
Relief Pharmacist	<b>v</b>			
Students				Ξ
Office Assistant	<b>V</b>	<b>V</b>		

- 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:

Pharma	Clik Rx - Security Administration
⚠	Role Type is currently assigned and cannot be deactivated.

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:

PharmaC	Clik Rx - Security Administration
⚠	Role Type is currently assigned and cannot be removed.

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.



# **Setting DIS Preferences**

To access the DIS Preferences, do the following:

- 1. Select **More** > **Nova Scotia**. The 'DIS Preferences' window will appear.
- 2. Set your preferences.

**NOTE:** The Dispense Pickup field is set automatically and cannot be changed.

3. Select the **OK** button.

### **DIS Preferences**

DIS Preferences	Yes 💌 🏹
Patient Search Default:	Local
Dispense Pickup:	Dispense
# of Days to Retrieve:	45

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)				
Dispense Pickup	<ul> <li>Determines the type of Dispense Pickup that will occur. For non-POS stores, the setting will be Workflow Integration for Workflow enabled stores and Dispense for non-Workflow enabled stores. For POS integrated stores, the setting will be POS Integration.</li> <li>POS Integration: Dispense Pickup is transmitted when the prescription sale is scanned at POS.</li> <li>Workflow Integration: Dispense Pickup is transmitted when Workflow has been completed for the prescription.</li> <li>Dispense: Dispense Pickup is automatically transmitted after the prescription dispense message has been successfully transmitted.</li> </ul>				
# Days to Retrieve	Used to determine how much historical information should be retrieved with the EHR Queries. A value must be specified. This field will be defaulted to 45 days.				



## **Issue Management Preferences**

Detected Issues are classified with a Priority (i.e. Error, Warning, or Information). An issue management is an action that is added to the patient's EHR to identify what steps were taken by a health professional to resolve a Detected Issue that was identified.



In Nova Scotia, the Issue Management Preferences <u>cannot</u> be modified. Regardless of the Priority or Severity of the issue, users must view any Detected Issues presented, as well as determine whether an appropriate Issue Management should be added.

Issue Management Profesences					
Is de Management Pretere					
Indicates which Detected Issue	: pri	iority will r	ave	e an issue Management added.	
Error	œ	Yes	0	No	
Warning	ſ	Yes	С	No	
Information	ſ	Yes	0	No	

Error	A problem that must be resolved or managed.
Warning or Information	An issue presented to assist with clinical decisions or to provide additional clinical information.

The following are the various types of Detected Issues that could be returned:

Rejected with Error	<ul> <li>The request has been rejected by the DIS and there is no Issue Management that can resolve this issue.</li> <li>The issue must be corrected and the transaction must be submitted again.</li> <li>Some examples include <i>Wrong Provider ID</i>, or <i>Wrong DIN</i>.</li> </ul>
Rejected with Warning or Information	<ul> <li>The request has been rejected by the DIS, but it can be managed with an Issue Management.</li> <li>An Issue Management must be added and the claim can be resubmitted.</li> <li>Some examples include <i>Interaction Checking</i>, or <i>Age Precaution</i>.</li> </ul>
Accepted with Warning or Information	<ul> <li>The request has been accepted.</li> <li>The Detected Issue can be managed with an Issue Management if desired, however it is not required.</li> <li>Some examples include <i>Fill Too Soon</i>, or <i>Duplicate Therapy</i>.</li> </ul>



## **Detected Issue Thresholds**

The Detected Issue Thresholds indicate which issue severity will halt the workflow and be displayed to the user.



In Nova Scotia, the Detected Issue Thresholds <u>cannot</u> be modified. Regardless of the Priority or Severity of the issue, users must view any Detected Issues presented, as well as determine whether an appropriate Issue Management should be added.

Non-Retail Detected Issue Thresholds will only impact your workflow if Detected Issues are displayed when interactively processing non-retail prescriptions. It will not impact batch processing where any Detected Issues can be viewed when the batch is complete.

Detected Issue Thresholds	;		
	Retail	Non-Retail	
Error	All	All	
Warning	All	All	
Information	All	All	
Allergy		All	
<u>D</u> efaults <u>H</u> istory	Detected Issues are returned from the Drug Information System to provide information relevant to the claim. It is recommended that all Detected Issues are viewed by all users.		

All	All Detected Issues, regardless of severity, will halt the workflow and be displayed for this priority.	
Unknown, High, Moderate	Only Detected Issues with the severity of Unknown/High/Moderate will halt the workflow and be displayed for this priority.	
Unknown, High	Only Detected Issues with a severity of Unknown/High will halt the workflow and be displayed for this priority.	
None	No Detected Issues of any severity will be displayed for this priority.	

### Pharmaclik RX

# 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** > **Nova Scotia**. 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.

💠 DIS Availability Change History				
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	No	Banumathy Amaran (BA2)	DIS Planned Network Outage	
L19459:26	$\sim$		· ····································	~~

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



# Accessing a Patient's EHR

When dispensing or providing patient care, it is important for the health provider to have access to a patient's medication profile in order to determine the best treatment plan. Under the *Personal Health Information Act*, Nova Scotia operates under an 'implied consent' model for the collection, use and disclosure of health information. However, privacy concerns require that pharmacies justify access to all patients' health records on the DIS for any reason other than filling a prescription.

Under the Personal Health Information Act patients have the right to request:

- A record of who accessed their personal health information
- A copy of their personal health information
- A correction to their personal health information

When filling a prescription, PharmaClik Rx will automatically display the patient's EHR without requiring the user to enter a reason. When a query is being performed to view the patient's EHR, users will be required to provide a reason for accessing the patient's profile. An audit of these requests will be recorded on the DIS and in the Patient History tab.



If there is a break in service (i.e., you view one patient's EHR Profile and enter a reason, but exit their EHR Profile to help another patient), then you will be prompted to enter a reason again in order to access the first patient's EHR.

### Entering Reason for Accessing EHR

If you are requesting to view a patient's EHR, you will be required to enter a reason prior to having access to view the profile. The **Comments** field allows users to enter additional information in regards to their reason for accessing a patient's EHR. Any comments entered in this field will be tracked in the Patient History tab.

When the 'Patient EHR Access Reason' window appears, do the following:

- 1. From the dropdown menu, specify a reason for accessing the patient's EHR (the default reason is *Practice Review*).
- 2. Enter in any comments in the **Comments** field (optional).
- 3. Select the **OK** button. The requested EHR query will appear.

🂠 Patient EHR Access Reason 🗧	x
Reason for Accessing Patient EHR	
Practice Review	
Comments	
1	
Date: Mar 09, 2015	
<u>Q</u> K <u>C</u> ancel	


# **Entering or Overriding Patient Consent**

Under the *Personal Health Information Act*, patients have the right to 'mask' their medication profile, which limits who has access to their personal health information. The mask will cover all of a patient's personal health information in the DIS, with the exception of demographic information necessary to confirm that the correct patient has been selected when providing care.

When information is 'masked', it can only be viewed by providing a consent override consent. If the patient's EHR has been masked, you must have the patient's permission to access their EHR. If a patient chooses not to provide consent to unmask their profile, health care providers have the discretion to refuse service. The rules governing retrieval of this information is limited to the following specific circumstances:

- **<u>Professional Judgement</u>** Where express consent of the patient has been obtained. This means that the patient has provided permission, or has done so through a health professional, for a specified period.
- <u>Emergency</u> In emergency circumstances in which the patient is unable to provide consent.



When a user requests to view a masked patient's EHR - ALL Profile, the override consent must be entered once to view all details. If a user requests to view a patient's EHR - Rx Profile, the override consent must be entered twice – once to view the prescriptions and once to view the devices. Additionally, override consent will also be required when a query is made for further detail or history of data.

To enter/override consent, do the following:

- 1. Search for and select the desired patient.
- 2. Select the **Profile** tab.
- Select Rx > Profile > EHR All (or EHR Rx). If the patient's profile is masked the following Detected Issue will appear:

<b>Priority Severity</b>		Issue Type	Description	l
Error		Business Constraint Violation: A local business rule relating multiple elements has been violated.	AN ERROR OCCURRED - ERROR DETAILS: PATIENT PROFILE IS MASKED	

- 4. Select the EHR Consent button. The 'EHR Consent' window appears.
- 5. Select either the **Override** checkbox.
- 6. Select a reason from the dropdown menu.
- 7. Enter your name in the **Provider** field (optional).
- Select the OK button to re-transmit the profile request. Once accepted, the patient's EHR will be displayed.



# Searching for & Synchronizing a Patient

When Nova Scotia 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 <u>Synchronization</u> section.

### Searching for a Patient

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 <u>DIS Preferences</u> section for more information.

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

PHN Co	de	PH	N	Last Na	ame	F	irst		
		T		Mckesson		Elvis			-
		-							
(		111						Þ	
<u>E</u> xten	19		Rec	ords Found	✓ .	Local	<u>S</u> earch	Clear	
Local	Sync	PHN Code		PHN		Last Na	me		_
		Other		7648592009	McKesson			EMis	

The sample patient below does not exist locally in PharmaClik Rx (indicated by the No Records

*Found*). As a result, you <u>must</u> use the  $\checkmark$  <u>search</u> button in the *Patient Search* window to check if the patient exists on the Client Registry before creating a new patient and adding their profile to the Client Registry.

💠 Patient S	Search							X
PHN Code	e	PHN	Last Nar	ne		First		1 *
	-		MacDonald		james			H
	•							
•								P
<u>E</u> xtended	ł	No Re	cords Found	✓ <u> </u>	ocal	<u>S</u> earch	Clea	a <u>r</u>
Local S	Sync	Last Name	First	N	fiddle	Birth Date	Gender	
$\forall \sim \sim$	$\sim$	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~		m	~~~~~	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~		~~~

The <u>4 scenario workflows</u> indicated below provide the steps necessary to search for a patient and synchronize them.

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### Synchronizing a Patient

In order to complete any interaction with the Nova Scotia DIS, you must ensure the Patient Folder is synced with the Client Registry. Within the Patient Folder there are two buttons that perform queries to the Client Registry:

• PHN Expand

When the PHN Expand button is used, a query to the Client Registry is performed based on the Patient's Name, DOB, Gender and PHN. This button is only available if the patient is <u>not synchronized</u>.

• Compare Compare

When the Compare button is used, a query to the Client Registry is performed based on the Nova Scotia DIS unique identifier for that patient. This button is only available if the patient is already <u>synchronized</u>.

### **Client Registry Search Criteria**

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

- Patient's PHN Code and PHN
- Patient's Full Last Name and Full First Name
- Patient's Full Last Name and Date of Birth

The PHN Code indicates the type of PHN your patient has (i.e. NS PHN, Other PHN, etc.). When searching the CR, selecting the PHN Code type is highly recommended as it helps to narrow your search criteria. For more information, refer to the <u>PHN Code</u> section.



If at any time a patient is synchronized with a NS DIS record and their PHN Code or PHN are not added, you must add this manually. This can occur for Out of Province patients.

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 % in <u>not</u> permitted. When a search query on the CR is performed, a maximum of 10 search results will be returned. If the number of results that match your search criteria is greater than 10, then the following prompt will display:

Pharm	aClik Rx - Validation
٩	Your search results returned too many records. Please refine your search criteria and try again.
	QK



## Scenario 1: 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 Nova Scotia and this is the first time they have received a health care service in Nova Scotia. 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 <u>always</u> 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 <u>all</u> search options are exhausted before adding a new patient to the CR.

🕂 Patient Search						×
PHN Code	PHN	Last Name	ə Fi	rst		
AB Life Time	▼ 85936024					Ξ
	•					
•	111				•	•
<u>E</u> xtended	No Re	ecords Found	Local 🗸	′ <u>S</u> earch	Clea <u>r</u>	
Local Sync P	HN Code	PHN	Last Name		First	
	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~			~~~~~	· ·····	m

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

**NOTE:** Before adding a new patient, it is imperative that you exhaust <u>all</u> search options.

- 5. Enter all related patient information for the new patient, including their Provincial Identification.
- 6. Select the **3<sup>rd</sup> 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 update has been successfully received by the NS 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 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 Nova Scotia resident or this is not the first time they have received a health care in Nova Scotia. 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.

PHN Co	de	PHN	Last N	ame	First		
NS PHN		▼ 123456789					Π
		•					
							-
4							
•		111				Þ	
<ul> <li>Extend</li> </ul>	ded	III I	Records Found	Local	✓ <u>S</u> earch	Clear	
✓ Extend Local	ded Sync	III PHN Code	Records Found PHN	Local Last Name	✓ <u>S</u> earch	Clear First	-

- 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 3<sup>rd</sup> Party tab. If the PHN Code is incorrect or not entered, modify it in the 3<sup>rd</sup> 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.

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



# Scenario 3: 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.

Patient Search PHN Code PHN Last Name Aiddle First Gen ^ QC PHN Ξ 56743239 • • ш Extended Search Clear **Records Found** ✓ Local PHN First Sync Last Name Local Mi Nolan-Mckesson

**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 3<sup>rd</sup> 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.



# Scenario 4: 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.

	de	PHN	Last N	ame F	irst		
S PHN		▼ 123456789					
		•					
_		111				•	
<u>E</u> xten	ded	R	ecords Found	✓ Local	<u>S</u> earch	Clear	
			PHN	Last Name		First	
ocal	Sync	PHN Code	FIIN	Edot Hamo			

- 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.
- If required, update your local information by highlighting fields from the Client Registry and selecting the left directional arrow Image: For more information, see the Patient Compare section.

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





# Patient Folder

## Main Tab

#### **Status Field**

The **Patient Status** is a mandatory field for DIS transactions as it indicates to PharmaClik Rx 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. 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:

		Vial Copies: 1
[	Alerts Jan 20, 2015	Patient status is Animal

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.

**NOTE:** The patient status 'Animal' should not be used to bypass transmitting prescriptions to the DIS. All prescriptions <u>must</u> be transmitted to the DIS and any prescriptions that are not may be monitored or audited.



#### Synchronization

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.

SMITH, R	3rd Party	Clinical Prof	ile History	Consult	Preferences	0 Notes		
Synchronized Patient Mode								
Last	SMITH	Bir	th Date: Feb 02	2, 1976 Ag	je:40 LastRx	: Feb 08, 2016		
First Name.	ROBERT	Ge	nder: Male	▼ Pł	HN: M12312231			
Mid Name:	MAPK Title	: 💽 Sta	atus: Active	<b>▼</b> Pa	at #:			
بالريهسانار	®ᢧᢇᢇ		~~~~~~~~~~	A	h for her	~some		

#### **Updating Patient Information**

If any of the following patient information is modified for synchronized patient, the updated information is automatically sent to the DIS once the Save button is selected and the patient's Client Registry is immediately updated:

- \*Last Name
- \*First Name
- \*Birthdate
- \*Gender
- Address 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 patient's *First Name*, *Last Name*, *Birth Date*, or *Gender*.

Pharma(	Clik Rx - Validation
?	Do you wish to proceed to update this synchronized patient information?
	<u>Y</u> es <u>N</u> o

### Pharmaclik RX

#### **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)** 
  - 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 Compari	ison		<b>×</b>		
PharmaClik Rx-			EHR			
PHN Code:	NS PHN					
PHN:	123456789					
First Name:	Elvis Bob		Elvis	(Bob)		
Last Name:	McKesson		МсКе	McKesson		
Birth Date:	Jan 01, 1980		Jan C	Jan 01, 1980		
Gender:	Male		Male			
Status:	Active		ctive	e		
Address Line 1:	123 McDover Driv	/e		Street		
Address Line 2:						
City:	Halifax		На			
Province:	Nova Scotia		Nova	2		
Postal Code:	B1B1B1		B1B1			
Phone:	(902) 729-4531					
	•	4 111	•			
Synchronized		Select All		Select All		
evert				Directional Arrow:		
Synchronized: A checkmark here indicates that the F Folder is synchron with the EHR.	ynchronized: checkmark here dicates that the Patient older is synchronized ith the EHR.		nark III fields Rx to CR.	When a field is highlighted, a directional arrow can be selected to update either the local or CR field.		



# Patient 3rd Party Tab

#### PHN Code Field

The PHN Code indicates the type of PHN your patient has (i.e. Nova Scotia PHN, Other PHN, etc.). This field is mandatory and must be populated in order to transmit information to the DIS. If you save a patient locally in PharmaClik Rx without a PHN Code, this field will automatically default to *NA*; this selection, however, does not permit you to transmit information to the DIS. You must update this field accordingly once you identify the patient's PHN Code.

	$\sim \sim \sim$	$\sim$	$\sim\sim\sim\sim\sim$	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~
PHN Code:	NA	•	PHN: 0	

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. For example, a patient used to live out of province so their PHN Code is *Other PHN*, however, the patient now lives in Nova Scotia and has a Nova Scotia health card, and so it can be modified to *NS PHN*.

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

- 1. Search for and select your desired patient.
- 2. Select the 3<sup>rd</sup> Party tab.
- 3. From the **PHN Code** dropdown list, select the appropriate type based on the patient's health card.
- 4. Select the **Save** button.

#### **PHN Field**

The Personal Health Number (PHN) is a unique identification number assigned to a resident of a province. In Nova Scotia this is called a Nova Scotia Health Card Number (HCN), however to maintain consistency, NS HCN will be referred to as PHN throughout this user guide. When saving a patient locally, users will get the following prompt if a PHN is not entered:

Pharma	Clik Rx - Validation
?	The Provincial Health Number is empty. Save this patient with a blank PHN?
	Yes

When the patient is from outside of Nova Scotia, their Provincial Identification and provincial 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 3<sup>rd</sup> Party tab. However, entering a patient's PHN in the 3<sup>rd</sup> Party tab <u>will not</u> copy it over to the main tab of the Patient Folder.



If you select the **Yes** button, then the patient will be saved locally with a default PHN of *0*. When you receive the patient's correct PHN, you must update this field as you will not be able to synchronize your patient with the NS DIS without the correct 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 is now shared with the DIS and with all health professionals that will be viewing the patient's Electronic Health Record. Therefore, it is imperative that you keep this clinical information as up to date as possible.

Once your pharmacy is live with the DIS, it will become standard practice to ensure that all patient information is up to date. When asking existing patients for updated clinical information, any new allergies or medical conditions should be transmitted to the DIS. Within the Clinical tab, you can add the following information, which can also be transmitted to the DIS:

- Observations
  - Height
    - Weight
    - BMI
    - Blood Pressure
- Clinical Information
  - Adverse Reactions
  - Allergies/Intolerances
  - Medical Conditions



### Pharmaclik RX

#### **Adding Observations**

Basic Patient Observations (i.e. Height, Weight, and Lab Results) are supported by the DIS. These fields can be continued to be maintained locally, as well as be transmitted to the DIS.

- 1. Search for and select the desired patient.
- 2. Select the **Clinical** tab.
- 3. In the **Height** field, enter the patient's height.
- 4. In the **Weight** field, enter the patient's weight.
- 5. Select the **EHR** checkbox.

**NOTE:** Both *Height* and *Weight* fields must be populated for the EHR checkbox to be enabled.

6. When the following validation prompt displays, select the **Yes** button:

PharmaC	lik Rx - Warning
?	Changes will be saved locally, and the patient's EHR will be updated. Would you like to continue ?
	<u>Y</u> es <u>N</u> o

A processing message will display indicating the information is being transmitted to the DIS. When the height and weight observations have been successful added, the processing window will close and the EHR checkbox will be selected.

#### Adding Lab Results

Lab Results (i.e. Blood Glucose, Blood Pressure and Body Temperature, Cholesterol, and Respiratory Rate) can be added to PharmaClik Rx and transmitted to the patient's EHR.

To add lab results to the DIS, do the following:

- 1. Search for and select the desired patient.
- 2. Select the **Clinical** tab.
- 3. Select the Lab Results button. The 'Maintain Lab Results' window appears.

👫 Maintain Lab Resu	ults						×
Lab Results: Body Ten	nperature			▼			
Date Dec 05, 2014	Time 8:42 am	°C 36	°F 96.8	Measurement #3	Status ormal 🔻	EHR ☑	Add
mante		A			~~~~	·/	Remove

- 4. From the Lab Results dropdown list, select the type of lab result you wish to add.
- 5. Select the **Add** button. A new row appears.
- 6. Enter the appropriate lab results/readings.
- 7. Select the EHR checkbox.
- 8. Select the **OK** button. The window will close and the information entered will be transmitted to the DIS.

# + Pharmaclik

#### **Viewing Clinical Information (Query)**

The **EHR Query** button allows you to access the patient's clinical results on their EHR and review what is currently on file to avoid duplicates. If the condition already exists on the patient's EHR, then it can be downloaded into your local system. The **EHR Query** button from the clinical tab only returns clinical results. There will be no prescriptions, devices, other medication or consultations. When adding new clinical information, it is recommended that this information is always transmitted to the patient's EHR. By default, the **EHR** checkbox will be selected for all observations and clinical information added. If you do not want the information transmitted to the patient's EHR, you can deselect the **EHR** checkbox.

To view the clinical details on a patient's EHR, do the following:

- 1. Search for and select the desired patient.
- 2. Select the **Clinical** tab.
- 3. Select the EHR Query button. The 'Patient EHR Access Reason' window will appear.
- 4. Select a reason for accessing the patient's EHR and select the **OK** button. The 'EHR Clinical' window appears.



5. Use the expand button to highlight the summary information for one of the documented conditions. This will enable the **Detail** and **History** buttons.



The **History** button will only be visible for Allergies/Intolerances, and Medical Conditions. This button will be greyed out for all other clinical information.

- 6. Select the appropriate button:
  - To view the details of an item, select the **Detail** button. The 'EHR Clinical Details' window appears.



💠 EHR - Cli	nical Details : MCKES	SSON, ELVIS	BOB PHN	1234	56789		
Allergy/Into	blerance						
ID:	6335	<b>v</b>	Local		туре:	Allergy	/
Entered on:	Feb 12, 2015	Status: ad	ctive		Description:	LEVO	THYROXINE SODIUM 137MCG TABL
Entered by:	ered by: ID: 2229 Code: PHARM Name: Sleeping B Landry's Pharmacy				Information:	SUSPE	ECTED
Reported on:	Feb 12, 2015	_			Effective:	Feb 12	2, 2015 🗖 Reported Reactions 🔢
Reported by:	Patient				Severity:	Mode	Allergy Test
Record No	tes	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	If Rep	oorte	ed 2		To view the
-			Reac	tion	s are		Reported Reactions
			asso	ciate	ed to the		or Allergy Test,
			clinic	al re	cord,		select the
			then	this	checkbox		appropriate expand
			will b	e se	lected.		button.

• To view details regarding changes made to an allergy/intolerance or medical condition, select the **History** button. The 'EHR – Clinical History' window appears.

🐈 EHR - /	Allergy/Intolerance History	: MCKESSON, ELV	'IS BOB PH	IN 123456789		×
DIS Id	Description	Туре	Status	Resolution	Confirmed	Effective Date
6335	LEVOTHYROXINE SODIUM 137MCG TABLET	Allergy	active			Feb 12,2015
•				the earoll her	7	•
			J USe	the scroll bal		<u>0</u> K
			the	History of the		
			aller			
			aller	gy/molerance.		

7. Once you are done viewing the details, select the **OK** button to exit.



#### **Downloading Clinical Information from the DIS**

If there is clinical information on the patients EHR that is not local, it can be downloaded into PharmaClik Rx by selecting the **Download** button. The information will be immediately transferred to PharmaClik Rx. The **Download** button will be disabled for records that are flagged as Local.

To download clinical information from the patient's EHR, do the following:

- 1. Search for and select the desired patient.
- 2. Select the Clinical tab.
- 3. Select EHR Query button. The 'Patient EHR Access Reason' window will appear.
- 4. Select a reason for accessing the patient's EHR and select the **OK** button. The 'EHR Clinical' window appears.
- 5. Highlight the desired non-local record and select the **Detail** button. The 'EHR- Clinical Details' window appears.

EHR - Clinical Details : MCKESSON, ELVIS BOB PHN 123456789										
Allergy/Into	Allergy/Intolerance									
ID:	5455	🗆 Local		Туре:	Allergy					
Entered on:	Dec 16, 2014	Status: active		Description:	GLIMEPIRIDE 1	MG TABLET				
Entered by:	ID: 2230 Code: PHA	RM Name: Homer Simp	53	Information:	SUSPECTED					
	Blue Pharmacy					Refuted				
Reported on:	Dec 16, 2014			Effective:	Nov 20, 2014	Reported Reactions				
Reported by:	Patient			Severity:	Moderate	🗖 Allergy Test 🔢				
Record Not	Record Notes									
	Text			Date		Author				
			~~~			man and a				

- 6. Select the **Download** button. The 'Medical Condition Search' window appears.
- 7. Select the **OK** button. The record is copied to the patient's local record.

**NOTE:** The 'EHR – Clinical' window will remain open in case an additional Drug Allergy or Medical Condition is to be downloaded.

- 8. Select the **OK** button.
- 9. Select the **Save** button. The Allergy/Condition will now be visible locally in PharmaClik Rx.

	Clinical I	Information	es 🗆 No Kr	www.Medical Conc	litions	Martin	Effective The date the Allergy/ Condition
	EHR	Medical Type	Medical Items	Effective	HOIO		
	<b>V</b>	Allergy Groups	PENICILLINS	Dec 17, 2014		Dama	DIS.
	~	Allergy Groups	(Refuted)BETAINE	Dec 15, 2014		<u>Remove</u>	
		Reactions	NSAID-INDUCED DUOD	EN.Dec 17, 2014		Sort	
	~	Allergy Groups	DEXTROSE	Jan 19, 2015			
		Medical Allergy	GLIMEFIRIDE	110720,2014	-		will be selected to
	•		111		Þ	<u>E</u> HR Qu	indicate this
Ľ	Alerts				~~~~		DIS.



#### **Deleting Clinical Information from the DIS**

To remove clinical information to the patient's EHR, do the following:

- 1. Search for and select the desired patient.
- 2. Select the Clinical tab.
- 3. Highlight the row to be removed.

No K	nown Medical Allergi	es 🗖 No Know	n Medical Conc	litions		
EHR	Medical Type	Medical Items	Effective	Note		<u>A</u> dd
✓	Allergy Groups	PENICILLINS	Dec 17, 2014			
<b>V</b>	Allergy Groups	(Refuted)BETAINE	Dec 15, 2014			<u>R</u> emove
	Reactions	NSAID-INDUCED DUODEN	Dec 17, 2014		=	Sort
	Allergy Groups	DEXTROSE	Jan 19, 2015			Dotaile
<b>v</b>	Medical Allergy	GLIMEPIRIDE	Nov 20, 2014		-	
1		111		•		<u>E</u> HR Query

- 4. Select the **Remove** button. A validation prompt will appear confirming the removal of the clinical information and all corresponding notes.
- 5. Select the **Yes** button.

If the removal of the clinical information is successful, the user will be returned to the Clinical tab. The Patient History tab will be updated with the following entry:





#### Adding an Adverse Drug Reaction

Adverse drug reactions are unusual, unintended and harmful reactions (i.e. bad side effects or allergies) that are experienced by the patient when taking certain medications. To ensure other health care professionals are aware of any adverse drug reactions a patient may be experiencing, a pharmacist can add this information to the patient's EHR.

To add an adverse drug reaction for a medical condition, do the following:

- 1. Search for and select the desired patient.
- 2. Select the **Clinical** tab.
- 3. Select the Add button. The 'Medical Condition Search' window opens.
- 4. Search for and select the condition. The 'Details Condition' window opens.
- 5. From the **Type** dropdown menu, select Reaction.
- 6. Enter in details for the reaction (optional).
- 7. Search for and select the drug related to the reaction (mandatory).
- 8. Select the **OK** button.

To add an adverse drug reaction for an allergy/intolerance, do the following:

- 1. Search for and select the desired patient.
- 2. Select the **Clinical** tab.
- 3. Select the Add button. The 'Medical Condition Search' window opens.
- 4. Search for and select the allergy/intolerance. The 'Details Allergy Groups' window opens.
- 5. Enter in details for the allergy (optional).
- 6. Search for and select the drug related to the allergy/intolerance (mandatory).
- 7. Select the **Reactions** button to enter details in regards to the patient's adverse drug reaction.
  - a. Select the Add button. The 'Reported Reaction Search' window opens.
  - b. Search for and select the reported reaction.
  - c. Enter in any details in the **Description** column.
  - d. Select the **OK** button.
- 8. Select the **OK** button.



It is highly recommended that all clinical information be transmitted to the DIS. The EHR checkbox will be selected by default. If you do not want the adverse drug reaction to be transmitted to the DIS, you must deselect this checkbox. By deselecting the EHR checkbox, you will be adding the adverse drug reaction locally only.

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#### Updating an Adverse Drug Reaction

To update an adverse drug reaction for a medical condition, do the following:

- 1. Search for and select the desired patient.
- 2. Select the Clinical tab.
- 3. Highlight the reaction you wish to update.
- 4. Select the **Details** button.
- 5. Make the necessary changes and select the **OK** button.

To update an adverse drug reaction for an allergy/intolerance, do the following:

- 1. Search for and select the desired patient.
- 2. Select the Clinical tab.
- 3. Highlight the allergy/intolerance you wish to update.
- 4. Select the **Details** button.
- 5. Select the **Reactions** button. The 'Reported Reaction Details' window opens.

💠 Report	ed Reaction Details				×
Patient:	McKesson, Elvis Bob	Medical Type:	Allergy Groups		
PHN:	123456789	Medical Item:	PENICILLINS		
			0		
	ection	Description	Severity	Onset Date	
LOCAL IN	FECTION SKIN		Moderate	▼ Dec 17, 2014	
			-		_
					_

- 6. Make the necessary changes and select the **OK** button.
- 7. Once done, select the **OK** button to close the window.

### Pharmaclik RX

#### Adding an Allergy/Intolerance

When a patient is obtaining a treatment plan, it is necessary to take down any allergies/intolerances they may have as it could impact their treatment.

- An <u>allergy</u> is a hypersensitivity caused by an exposure to a substance which results in an adverse immunologic reaction on subsequent exposures. A rash, hives, swelling and anaphylaxis generally signify the presence of an allergy.
- An <u>intolerance</u> is an identified reaction (i.e. nausea, dry mouth, hair loss, etc.) to a substance which is caused by a mechanism other than an immunologic over-response. Intolerances do not tend to have the risk of producing a more severe reaction on subsequent exposures.

Allergies and intolerances are recorded in circumstances where the dispenser has a fair degree of confidence that the drug is the cause of the reaction or when specific testing has been completed to confirm the presence of an allergy. It is recommended that if a patient reports no allergies/intolerances that this be recorded as a patient note and transmitted to the EHR so other health professionals are aware. It is important to note that non-medical allergies, (i.e. dust, egg, etc.), cannot be added to the patient's EHR. Non-medical allergies can be added locally in the Clinical tab, and then as a note in the Notes tab (which can be transmitted to the DIS).

To add an allergy/intolerance, do the following:

- 1. Search for and select the desired patient.
- 2. Select the Clinical tab.
- 3. Select the Add button. The 'Medical Condition Search' window opens.
- 4. Search for and select the allergy/intolerance. The 'Details' window will appear.
- 5. Enter in details for the allergy (optional).
- 6. From the *Information* field, select whether the allergy is Suspected or Confirmed.

**NOTE:** This field will only be visible for a medical condition type of Medical Allergy, Non-Medical Allergy, and Allergy Groups.

- 7. Search for and select the drug related to the allergy/intolerance (mandatory).
- 8. To enter details in regards to the patient's adverse drug reaction, select the **Reactions** button (optional).
- 9. Select the **OK** button.



It is highly recommended that all clinical information be transmitted to the DIS. The EHR checkbox will be selected by default. If you do not want the allergy/intolerance to be transmitted to the DIS, you must deselect this checkbox. By deselecting the EHR checkbox, you will be adding the allergy/intolerance locally only.

When an allergy/intolerance is added, it gets tracked in the History tab of the Patient Folder.

	Mckesson, E	3rd Parl	y Clinical	Profile	History	Consult	Preferences	0	Not	tes
	Entered	User	Ev	ent	Ac	tivity	Com	ment	s	
	Feb 12, 2015 1	0:09PR	Medical Aller	gy Groups	Added		BIOTIN			
h		~~ <u>~</u> ~~~		James	LBU .					~~



#### **Updating an Allergy/Intolerance**

- 1. Search for and select the desired patient.
- 2. Select the **Clinical** tab.
- 3. Highlight the allergy/intolerance you wish to update.
- 4. Select the **Details** button. The 'Details: Allergy Groups' window appears.

💠 Details: Aller	gy Groups - BIOTIN	×
Туре:	Allergy - Severity: Moderate - F	Private
Reaction:	E E	EHR
Effective Date:	Feb 12, 2015     Effective Until:     F	Refuted
Reported By:	Patient  Name:	
Entered By:	PR Information Suspected	
Drug		
DIN:	2233852	
Generic:	LEVOTHYROXINE SODIUM	
Trade:	SYNTHROID	<u>S</u> earch
Notoo		
NULES	Add Delete Alert Print Private EHR User D	ate
		_
- man		

5. Make the necessary changes and select the **OK** button.

Any changes made will be tracked in the History tab of the Patient Folder.



#### **Refuting an Allergy/Intolerance**

If an allergy/intolerance is added to a patient's EHR, and the EHR is viewed by another health professional, then it cannot be removed from the patient's EHR. You can, however, refute the allergy/intolerance, so other health professionals can see that it no longer applies to the patient. It will be clearly indicated on the patient's local profile, as well as their EHR, that the allergy/intolerance is refuted. It is important that this information remains on the patient's EHR as other health professionals may have at some point made clinical/medical decisions for the patient based on this allergy/intolerance.

- 1. Search for and select the desired patient.
- 2. Select the Clinical tab.
- 3. Highlight the allergy/intolerance you wish to refute.
- 4. Select the **Details** button. The 'Details: Allergy Groups' window appears.
- 5. Select the **Refuted** checkbox.

💠 Details: Aller	rgy Groups - BIOTIN	×
Туре:	Allergy Severity: Moderate   Private	
Reaction:	EHR	
Effective Date:	Feb 12, 2015 Effective Until: Refuted	
Reported By:	Patient 🔽 Name:	
Entered By:	PR  Information Suspected	
_ Drug		
DIN:	2233852	
Generic	LEVATHYROXIMESOPHIM	

6. Select the **OK** button.

#### **Deleting an Allergy/Intolerance**

If an allergy/intolerance has been added to a patient's EHR and it has not been viewed by another health professional, then it can be deleted and completely removed from the patient's local profile and EHR.

- 1. Search for and select the desired patient.
- 2. Select the **Clinical** tab.
- 3. Highlight the allergy/intolerance you wish to update.
- 4. Select the **Remove** button. A validation prompt will appear.
- 5. Select the Yes button.
- 6. Select the **Save** button.



#### Adding a Medical Condition

PharmaClik Rx uses First Databank (**FDB**) interaction codes to monitor all interaction checking within the application; however the Nova Scotia DIS only supports **ICD-10-CA** interaction codes. As a result, it will be necessary to have duplicate entries in your patient's Clinical tab as:

- only ICD-10-CA codes can be added to a patient's EHR Profile and;
- only FDB codes can be used locally for interaction checking

ICD-10-CA is an international morbidity classification standard developed by the World Health Organization for reporting clinical diagnoses. It is more comprehensive and specific than current standards and extends well beyond the traditional types of conditions previously used. ICD-10-CA also includes conditions and situations that are not diseases but represent risk factors to health, such as occupational and environmental factors, lifestyle and psycho-social circumstances. Other benefits include:

- Improved specificity and currency
- Ongoing maintenance and updating
- Single set of national standards
- International comparability
- More effective structure, presentation and guidelines

When adding conditions to a patient's EHR that will be shared with other clinicians through the DIS, all conditions <u>must</u> be added using the ICD-10-CA code listing. To ensure interaction checking also occurs locally within PharmaClik Rx, you must add the condition to the patient's local profile using the FDB code listing. The *Medical Condition Search* window will now contain 2 new entries in the Type dropdown list: **Conditions FDB** and **Condition ICD10**. This will allow you to filter the medical conditions that are returned and add the appropriate codes locally and to the patient's EHR Profile.

To add a condition to a patient's local and EHR Profile, do the following:

- 1. Search for and select the desired patient.
- 2. Select the **Clinical** tab.
- 3. Select the **Add** button. The 'Medical Condition Search' window opens.
- 4. From the *Type* dropdown list, select **Condition ICD10**.

Туре		Description		
Allergy Groups				
Condition FDB				
Condition ICD10	_			
Davicen _ man		m may por	m	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~

- 5. Search for and select the medical condition. This condition will be added to the patient's local and EHR Profile, however no local interaction checking will occur.
- 6. The 'Details Condition' window opens. Enter in details for the condition (optional).
- 7. Ensure that the **EHR** checkbox is selected.

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**NOTE:** If you are unable to select the EHR checkbox, then the condition selected is not in the ICD-10-CA code listing. Refer back to Step 4.

8. Select the **OK** button. A warning will be displayed indicating that the condition is not part of the PharmaClik Rx interaction checking.



- 9. Select the **Yes** button.
- 10. From the Clinical tab, select the **Add** button to add the medical condition from the FDB code listing. The 'Medical Condition Search' window opens.
- 11. From the *Type* dropdown list, select **Condition FDB**.
- 12. Search for and select the medical condition. This condition will be added to the patient's local profile in PharmaClik Rx only and will be used to complete interaction checking within PharmaClik Rx.
- 13. Select the **OK** button.



It is highly recommended that all clinical information be transmitted to the DIS. The EHR checkbox will be selected by default when adding a medical condition from the ICD-10-CA code listing. If you do not want the medical condition to be transmitted to the DIS, you must deselect this checkbox. By deselecting the EHR checkbox, you will be adding the medical condition locally only.

#### **Updating a Medical Condition**

- 1. Search for and select the desired patient.
- 2. Select the **Clinical** tab.
- 3. Highlight the medical condition you wish to update.
- 4. Select the **Detail** button.
- 5. Make the necessary changes and select the **OK** button.
- **NOTE:** If the medical condition is from the ICD-10-CA code listing and the EHR checkbox is selected, your changes will be transmitted to the DIS and updated on the patient's EHR Profile. If the medical condition is from the FDB code listing, the changes will be saved locally within PharmaClik Rx only as the DIS only supports ICD-10-CA codes.



# Patient Profile Tab

A patient's <u>local</u> 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.

#### Viewing a Patient's EHR Profile (Query)

A patient's EHR contains all medications and devices prescribed and dispensed to a particular patient registered in the provincial CR. In order to view a patient's EHR, a PharmaClik Rx user must have successfully completed a patient search to uniquely identify the patient.

The EHR displays the following sections of information:

- **Clinical Information** The Clinical Information of the patient's EHR can be viewed and edited from the patient's clinical tab. When viewing the patient's EHR from the patient's Profile tab the clinical information is only viewable to the user. The view of this clinical information is outlined in the Clinical tab section.
- **Profile Information** Contains prescriptions categorized into (i) DIS only, (ii) DIS and PharmaClik Rx, and (iii) PharmaClik Rx only.

To view a patient's EHR from the patient profile tab, do the following:

- 1. Search for and select the desired patient.
- 2. Select the Profile tab.
- 3. Select **Rx** > **Profile**.
- 4. Select either EHR All or EHR Rx. The patient's EHR appears.
  - EHR All: Will display both Clinical and Prescription Information for the last 45 days only.
  - EHR Rx: Will display only **Prescription** Information. The prescription information will include *Dispense*, *Device Transaction*, and *Other Medication*.



If this is the first time the Patient Folder is being acted upon, then the 'Patient EHR Access Reason' window will appear and require you to enter a reason for accessing the patient's EHR.

- 5. Highlight a row and select the **Detail** button to view more information. The 'EHR Rx Details' window will appear. It is broken up into two separate sections: *Create Rx Info* and *Dispense Info*, as shown below.
- 6. Once you are done viewing the patient's EHR, select the **OK** button.



💠 EHR - Rx Details: MCKESSON, ELVIS BOB PHN 12345	6789	×
Create Rx Info     Rx ID: 11779     Created: Feb 02, 2015     Status: completed     Prescriber: Dr. CHAPLIN, CHARLIE     Licence#: 2224     Assigned to: Landry's Pharmacy, ID: 99988     Auth. Number: 502598     O Detected leave(a)	DIN/GCN : 2384701           RAN-ALENDRONATE 10 MG SW           ORAL           QA:         1 TAB           Refills         1           Qty:         1 TAB           DS:         1 c           Route:         Transmission           Instructions         TAKE	<b>Create Rx Info</b> This section is "how the prescriber wrote the prescription". Details such as Prescriber, Detected Issues, Record Notes are all available.
0 Refusal(s) to Fill		Dispense Info
Dispense Info     ID: 19357127     Status: Completed     Entered on: Feb 02, 2015     Status: completed     Entered by: ID: 2231 Name: Doogie Howser     Fill Type: Daily Fill     Picked up: Feb 03, 2015     0 Record Note(s)   O Detected Issue(s)        IC: < 1 of 1 > >	DIN/GCN : 2384701           RAN-ALENDRONATE 10 MG SW/ ORAL           Qty:         1 TAB           Refill:         0           QD:         1 TAB           DS:         1 d           Route:	This section outlines each dispense (i.e. refills) as their own record. Dispenses can be viewed by scrolling using: If ( 1 of 4 ) ) Or by selecting the Condense mode to see the

Local Indicate if the record resides locally within PharmaClik Rx

 $\square$ 

For local records, display the prescription in RX Detail

The Patient History tab will record the following:

McKesson, E	3rd Party	y Clinical	Profile History	Consult	Preferences	0	Notes
Entered	User	Event	Activity	C	comments	F	Private 🔺
Jan 16, 2015 15;	)6 PR	EHR - All	Practice Review				
Lap 200		New	-ice	Arrent		comor -	



#### Sample EHR - ALL Profile Window

The **EHR – All** window, as shown below, is broken down into two sections: *Clinical Information* and *Profile Information*. Clinical Information is a view only. Download is not permitted from this view. Profile Information can be viewed by both Type and Source.



The **EHR – All** window will only display *Clinical* and *Profile* Information from the last <u>45 days</u> <u>only</u>. If you wish to see all of the prescriptions on the patient's EHR Profile, you must view the **EHR- Rx** Profile. If you wish to see all other information, you must view the EHR from the corresponding tab in PharmaClik Rx (i.e., to view all allergies for a patient select **EHR Query** from the Clinical tab; to view all professional consultations for a patient select the **EHR Query** button from the Consult tab).

**NOTE:** The **Service Date** field reflects the last Service Date provided for that prescription by a pharmacy. The **Written Date** field (located to the far right of the EHR- All and EHR- Rx window) reflects the date the prescription was written.



#### Sample EHR - Rx Profile Window

The **EHR – Rx** is a view of Profile Information only, as shown below. Prescriptions can be viewed by both Type and Source.

indicates if the	Profile Type	Information — e: All	<b>~</b>	Sou	urce: Combined		ondense
prescription is:	Local	Service Date DIS ID	Type Status	lssues Notes	Product Information	Qty DS	REM QA
🗹 Local Only	<b>v</b>	Feb 13, 2015 3777	Device completed		ONE TOUCH FAST TAKE BLOOD G OPINION:97799983	àLl1	1
		Feb 13, 2015 19368124	Other Med active		VITAMIN B12 DIN:00335940	30	0
Dis Only	<b>N</b>	Feb 09, 2015 <b>11886</b>	Rx active		APO-ACEBUTOLOL 100 MG SWAL DIN:02147602 DROP	LO	30 DR
Local and DIS		Feb 08, 2015 19362224	Other Med completed		ASATAB 80 MG SWALLOW, ORAL DIN:02280167	5	0
		Feb 08, 2015 19362213	Other Med completed		ASACOL 800 MG SWALLOW, ORA DIN:02267217	L 4	0
		Feb 08, 2015	Local DUR		ACETYLSALICYLIC ACID;ASA EXT DIN:999946 TABLET	Г 12 ТАВ 3	L
		Feb 08, 2015	Local DUR		ACETYLSALICYLIC ACID:ASA DIN:2067188 TABLET	9 TABL 3	E
	•		111				•



Device prescriptions will not contain the Last Filled date or the quantity that is remaining. It is recommended that the user Detail the Device prescription to view the Details of the Device, such as Created Date, Last Filled Date, Qty and Qty Remaining.

**NOTE:** The **Service Date** field reflects the last Service Date provided for that prescription by a pharmacy. The **Written Date** field (located to the far right of the EHR- All and EHR- Rx window) reflects the date the prescription was written.



#### Sample EHR - Rx Details Window

The **EHR – Rx Details** window, as shown below, is broken down into two sections: *Create Rx Info* and *Dispense Info*. The Create Rx Info will display details in regards to the drug being dispensed and the pharmacy that created the dispense. The Dispense Info will display details in regards to the drug and the pharmacy that actually dispensed the drug to the patient.

	Additional Rx Info Select the expand button to view additional details regarding the Device Rx (i.e. DIS ID, Dosage times, Route, SIG etc.).
Auth. Number: 0 Record Note(s) 0 Detected Issue(s) GIVE 1 TEASPOONFUL THREE TIMES DAILY FOR 0 Refusal(s) to Fill 0 Detected Issue(s) THREE TIMES DAILY FOR 0 Refusal(s) THREE T	Additional Dosage Info Select this expand
Dispense Info       Condense         ID:       50198956       ID:       Compound for PDRUG010, DIN/HIC:       Str.         Entered on:       Jan 27, 2015       Status       Compound for PDRUG010, DIN/HIC:       Str.         Entered by:       ID:       2229 Name: Sleeping Beauty       ID:       Name:       Mfr:         Fill Type:       First Fill       QD:       DS:       12 d       Intervat	button to view details regarding the instructions (i.e. supplemental instructions, etc.).
0 Record Note(s) 0 Detected Issue(s) K < 1 of 1 >> Detected Issue(s) Constructions Give T LASPODNFUL THREE TIMES TO DAYS AND THEN APPLY TO AFFECTED AREA TO OFF DAILY UNITY EMICUSED QK	Additional Dispense Info Select the expand button to view additional details regarding the Dispense of the Rx (i.e. Location, Max Qty Per Day etc.).

As indicated above, when the expand **b** button is selected 'Additional Rx Information' window will appear and display the similar details as shown:

	-	
Field	Data	
Previous Rx ID		
Inferred Indicator	Yes	
ePrescription	Non-authoritative	
Trial	No	
Dispensable Status	active	
Prescribed at		
Substitution Condition	unconditional	
Total Days Supply	3 d	



#### Sample EHR - Other Medication Details Window

Other Medications are DUR Instructions used to record "Over the Counter" drugs, along with natural products, vitamins, or products dispensed out of province at another health facility. The 'EHR – Other Medication Details' window displays the details as recorded on the patient's EHR.

EHR - Oth ID: Entered on: Entered by: Start Date: End Date:	er Medication D 50195174 Jan 17, 2015 : Jesse James , ID Jan 17, 2015 Jul 17, 2015	etails: MCKESSON, E Status: active	ACT SERTRAL	Form:	Additional DUR Info Select the expand button to view additional details regarding the DUR, including DIS ID, Dosage times, Route, SIG etc.).
This allows Medication	Tex a user to add a Re rx on flie for patient	tt icord note to a Other t that is not local.	Date Feb 10, 2015 08:54	ID: 2229 Name: Sh	Location Details Select the expand button to view details regarding the location of the pharmacy that added the DUR.
1 Detecto	ed Issue(s)			History	History Displays the change history of the DUR

Record Notes will only exist when a Note is added to an Other Medication. Users are able to add Record Notes only to an Other Medication that is not local (was added at another pharmacy). Users can add a record note by selecting the 🛨 button. The 'Add record Notes' window will appear allowing you to enter your notes for all health providers to view regarding the Other Medication.

💠 EHR - Add record Notes	×
Please enter notes in the field below :	
	*
<u> </u>	





#### Sample EHR - Device Rx Details Window

The following outlines the 'EHR- Device Rx Details' window of the Device. As with prescriptions, the Device Details is divided into two sections: *Create Device Rx Info* and *Dispense Device Info*.

EHR - Device Rx Details: MCKESSON, ELVIS BOB PHN     Create Device Rx Info     Device Rx ID: 3777     Created: Feb 13, 2015     Status: completed     Prescriber: Dr. Jesse James     Licence#: 2224     Assigned to: Lando/c Pharmacy. ID: 90088	V 123456789           DIN/G CN · 07700083           GLUCOSE T/S - 50           GA:         1           Refills         1           Form:         1           Gty:         DS:           I d         Interval:           Route:         Treatment Type:	Select the expand button to view additional details regarding the Device Rx (i.e. DIS ID, Dosage times, Route, SIG etc.).
Auth. Number: 0 Record Note(s) 0 Detected Issue(s) 0 0 Refusal(s) to Fill 0 Dispense Device Info ID: 19367770 Entered on: Feb 13, 2015 Entered by: ID: 2231 Name: Doogie Howser Fill Type: Daily Fill	No Sub:	Additional Dosage Info Select this expand button to view details regarding the instructions (i.e. supplemental instructions etc.).
Picked up: Feb 13, 2015 0 Record Note(s) 0 Detected Issue(s)	As DIRECTED	Additional Dispense Info Select the expand button to view additional details regarding the Dispense of the Rx (i.e. Location, Max Qty Per Day etc.).



#### Updating a Patient's Prescription Status on the EHR

For non-local records, users can use the **Update Status** button to change the status of a non-local prescription (i.e. changing from 'Active' to 'Aborted').

<table-cell-rows> EHR - Rx De</table-cell-rows>	tails: MCKESSON, ELVIS BOB PHN 1234	56789	$\bowtie$
Create Rx Info	)		
Rx ID:	11565 🗆 Local	DIN/GCN : 2147602	
Created:	Jan 14, 2015 Status: completed	APO-ACEBUTOLOL 100 MG SWALLOW, Str:	
Prescriber: Assigned to:	Dr. Charlie Chaplin Licence#: 2225	QA: 1 TAB Refills 1 Form: TAB Qty: 1 TAB DS: 1 d Interval: Route: Treatment Type: No Sub: Instructions	Status button will be enabled only for prescriptions that are on the
	Record Note(s) 👉 0 Detected Issue(s) 👉 efusal(s) to Fill 🔁	TAKE 1 DAY	DIS and not in PharmaClik Rx.
Dispense Info	10248272	DIN/GCN : 2147602	
ID: Entered on:	Jan 14, 2015 Status: completed	APO-ACEBUTOLOU WALLOW, Str:	The Download
Entered by:	ID: 2231 Name: Doogie Howser	Gturing Refill 0 Form: TAB	button will be enabled only for
Fill Type:	Daily Fill	I IAB DS: I d Interval:	prescriptions that
Picked up:	Jan 14, 2015	Sub Reason: Code:	are on the DIS
0 Reco	rd Note(s)	TAKE 1 DAY	and not in PharmaClik Rx.

To update the status of a non-local prescription, do the following:

- 1. Search and select the desired patient.
- 2. Select the Profile tab
- 3. Select **Rx** > **Profile** > **EHR All** (or **EHR Rx**).
- 4. Highlight the desired non-local DIS record.
- 5. Select the **Detail** button.
- 6. Select **Update Status.** The 'Update Status' window will open.
- 7. From the **Status** dropdown menu, select the status of the prescription. The following options are available:
  - Abort (Discontinue)
  - Suspend
  - Resume
- 8. From the **Reason** dropdown list, select the reason for the status change.
- 9. In the **Notes** field, enter any comments about the status change. This field is not required.
- 10. Select the **OK** button.

When selecting **Suspend**, the release date will record the intended release date for the prescription. This date will be recorded on the patient's EHR only.

Status: Suspend 💌 and release on:	
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# 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 adding notes), and prescription activities (such as filling, cancelling, or transferring a prescription). Each time a patient's EHR is viewed, an entry will also be created in this tab. For each event, the date, user, type of activity, and comments will be displayed, as shown below.

McKesson, E	3rd Party	, Clinical	Profile	History	Consult	Preferences	U	Not	es
Entered	User	Event	A	ctivity	С	omments	F	Private	•
Dec 16, 2014 1	7:50RA	EHR - Clinical	Practice	e Review					
Dec 16, 2014 1	1:21 RLU	Refill Rx	Refuse	d	ALENDRO	NATE SODIUM;	РМ		
Dec 16, 2014 1	1:21 RLU	EHR - All	Practice	e Review	REFILL				
Dec 16, 2014 1	1:05RLU	EHR - All	Practice	e Review	REFILL				Ξ
Dec 16, 2014 10	):50 R L U	ReAuth Rx	Dispens	sed	ALENDRO	NATE SODIUM;	РМ		
Dec 16, 2014 10	):50 R L U	Rx	Interact	tion	EVALUATI	E PATIENT:This r	efil		
Dec 16, 2014 10	0:48RLU	New Rx	Dispens	sed	ALENDRO	NATE SODIUM;	РМ		
Dec 16, 2014 10	):48RLU	Rx	Interact	tion	EVALUATI	E DRUG:A lower	pri		
Dec 16, 2014 10	):44RLU	EHR - Clinical	Practice	e Review					
	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~		~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~		and the second s	~~~~~	~~~	5	لمسر



It is imperative that users log into PharmaClik Rx with their correct credentials and do not share their passwords. All activity sent to the DIS is done so with a user attached.

For each event that is recorded in the History tab, such as an interaction or dispense, you can select  $\mathbf{Rx} > \mathbf{Detail}$  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, however only a consultation type of *EHR Professional Service* can be transmitted to the DIS.

#### **Viewing Consultations (Query)**

The **EHR Query** button in the Consult tab allows a user to view all consultations on a patient's EHR before adding any new records to the EHR unnecessarily. The **EHR Query** button will not display any prescriptions, devices, other medications, or clinical information. Only consultation results on the EHR will be returned.

To view all consultations on a patient's EHR, do the following:

- 1. Search for and select the desired patient.
- 2. Select the Consult tab.
- 3. Select the EHR Query button. The 'Patient EHR Access Reason' window will appear.
- 4. Select a reason for accessing the patient's EHR and select the **OK** button. The 'EHR Consultations' window opens.
- 5. Choose to view in either a 'Condense' mode or 'Uncondensed' mode by selecting the **Condense** checkbox. Condense will be the default view.
- 6. Use expand (1) and collapse  $(\boxdot)$  to reveal or hide additional summary view details.



7. When the summary information is selected, select the **Detail** button to view more information. The 'EHR Professional Service Details' window will appear.

🕂 EHR - Profes	ssional Service De	tails: McKesson, El	vis Bob PHN 123	3456789			
ID: Entered on: Entered by:	1138 Nov 26,2014 Doogie Howser Blue Pharmacy II	Complete	Description	Patient Assessment			
Performed on: Performed by:	Nov 26,2014 Doogie Howser		Requested By: Supervised By:				
Record Notes							
	Text	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	Date	Author			

- 8. To view details regarding the location of the pharmacy, select the expand button next to the *Entered By* field.
- 9. Once you are done viewing the EHR, select the **OK** button.



#### Adding a Consultation/Intervention

The consultation type of *EHR Professional Service* has been added to the existing consultation type list. Only this type of consultation will be transmitted to the DIS. To add a new consultation to a patient's EHR, do the following:

- 1. Search for and select the desired patient.
- 2. Select the **Consult** tab.
- 3. Select the **Add** button. The 'Consultation/Intervention Form' window will open.

Consultation/Intervention Form - Mckesson, Elvis Bob PHN 123456789									
Entered: Feb 11, 2015 User: PR 💌 S	Type: EHR Profession Service Dur: Service Lev: quested By: Provider	na ✓ Sched: Follow-up: ✓ Actual Follow-up: ✓ Follow-up User: JESSE JAMES		Private EHR					
Drugs Involved DIN	Tradename	Strength		Add					
			-	Remove					
				C <u>h</u> eck					
Services									
Category									
EHR Professional Service Professional Service – Medication Review									
				R <u>e</u> move					

**NOTE:** It is recommended that you view the patient's EHR prior to adding any consultations to prevent duplicate data on the patient's EHR.

- 4. From the **Type** dropdown menu, select the appropriate consultation type.
- 5. The **EHR** checkbox will be selected by default. If you do not want to transmit the consultation/intervention to the DIS, deselect this checkbox.
- 6. If the *EHR Professional Service* was requested by a provider, use the expand button to search for and select the provider in the Requested By field.
- 7. Enter any other additional information, such as **Service Duration**, **Service Level**, **Drugs Involved**, and **Services**, and/or **Notes**. Depending on the consultation type selected, some fields may be required.
- 8. Select the **OK** button.



For Immunizations, additional information such as a follow-up can be provided. If a follow-up is entered, then an entry will be added to the Activities tab for the scheduled follow-up date.



#### **Updating a Consultation/Intervention**

- 1. Search for and select the desired patient.
- 2. Select the **Consult** tab.
- 3. Highlight the **Service** you wish to update.
- 4. Select the **Details** button. The 'Consultation/Intervention Form' window opens.
- 5. Make the necessary modifications and select the **OK** button.

Mckes	sson, E	3rd Par	ty   C	Clinical	Profile	History	Cons	sult	Preference	5 0	Notes
EHR Entered User Type		Service		Drug		Patient Mode					
	Feb 11 - 20	1500	EHD	EHD Dr	ofeccional	Service			_	É	<u></u> 4dd
	reb 11, 20	ngrit.		LIIIVII	oressional	Cervice				Re	move
										9	3 <u>o</u> rt
										C	хору
										E	<u>Print</u>
											etails
			111						4	<u>E</u> HF	≀Query
~~~~~	-to	where the second	$\sim$		~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~		~~~~~~	<u>^</u>		Jow	

#### **Deleting a Consultation/Intervention**

- 1. Search for and select the desired patient.
- 2. Select the **Consult** tab.
- 3. Highlight the professional service you wish to delete.
- 4. Select the **Remove** button.




#### Adding New Immunization to the DIS

To transmit a new immunization from to a patient's EHR, do the following:

- 1. Select the **Patient** button to search for and select a patient.
- 2. Select the **Consult** tab.
- 3. Select the Add button. The Consultation/Intervention Form window opens.
- 4. From the **Type** dropdown list, select **Immunization**.
- 5. In the **Immunization Date** field, specify the date of the immunization.
- 6. In the **Quantity** field, specify a quantity.
- 7. Under the *Drugs* section, select the **Add** button to search for and select a drug.
- 8. In the **Lot #** and **Expiry** fields, enter the appropriate information. These fields are mandatory.
- 9. Specify any other additional information as required (e.g. Dosage Sequence, Follow-up Immunization, and Notes).
- 10. Select OK.

Consultation/Intervention Form - Marshal, Mack PHN						×		
Entered: User: ID: Druas	Jul 04, 2023 Type: Immunization TM Quantity: Site: Left Arm Requested By: Provider Refusal:	▼ 1.00 ▼	Immun Follow Follow Dosag	ization Date: -up Immunization: -up Booster: e Sequence:	Jul 04, 2023 Sep 04, 2023 First Dose		☐ Private ☑ EHR	
DIN	Tradename	Strer	ngth	Expiry	Lot#		Add	
2468425	SHINGRIX	50MC0	G/0.5	Dec 31, 2023	DF2123		<u>R</u> emove	
							C <u>h</u> eck	
Notes								
						Ŷ		
All Interac	tion Invoice				<u>0</u> I	<	<u>C</u> ancel	



*Note:* The Immunization Date entered will appear in the Follow-up Date field on the Patient Consult tab.

#### Viewing an Existing Immunization via Query

To review an existing immunization for a patient:

- 1. Select the **Patient** button to search for and select a patient.
- 2. Select the **Consult** tab.
- 3. Select the EHR Query button. The EHR Consultations window opens.
- 4. Expand the Immunizations section using the **Expand •** icon.

**Result:** Existing immunizations will display.

Note: You can view details of the immunization (such as notes) from the EHR – Immunizations Details window by selecting the immunization and selecting the Detail button.



#### Patient Notes Tab

Any notes added in the Patient's Notes tab can be transmitted to a patient's EHR.

#### Viewing Patient Notes (Query)

The **EHR Query** button in the Notes tab allows a user to view all notes on a patient's EHR before adding any new records to the EHR unnecessarily. Although it is not necessary to view the notes on a patient's EHR prior to adding a new note, it is highly recommended to prevent duplicate data from being added to the patient's profile.

To view the notes on a patient's EHR, do the following:

- 1. Search for and select the desired patient.
- 2. Select the **Notes** tab.
- 3. Select the **EHR Query** button. the 'Patient EHR Access Reason' window will appear
- 4. Select a reason for accessing the patient's EHR and select the **OK** button. The 'EHR Patient Notes' window opens.

💠 EHR - Patient Notes: McKesson, Billy Bob 🛛 PHN: 73649182	×
	Condense
Notes	
Patient Notes (2)	
General Note (1)	
Note: Patient prefers brand name drugs only.	
I Immunization (1)	
Note: Patient cannot have immunizations on their upper left arm.	
What prove and a provide a second and a second and a second a se	Amman



The **EHR Query** initiated from the Patient Notes tab will only return patient notes. There will be no prescriptions, devices, other medication, clinical information, or consultations.

- 5. Choose to view in either a 'Condense' mode or 'Uncondensed' mode by selecting the **Condense** checkbox. Condense will be the default view.
- 6. Use expand  $(\textcircled{\pm})$  and collapse  $(\boxdot)$  to reveal or hide additional summary view details.
- 7. When the summary information is selected, select the **Detail** button to view more information.
- 8. Select the **OK** button to close the 'EHR Patient Notes' window.



#### Adding Patient Notes

A patient note can be added to a Patient's profile if the dispenser identifies relevant information through an encounter with the patient. Notes should be medically related. This includes information such as:

- Compliance issues
- Difficulty swallowing medication
- Smoking status

Patient notes are added locally. If you would like a note to be transmitted to the patient's EHR, you must select the EHR checkbox, as shown in the image below. A validation prompt will display to confirm whether you would like to add the note to the EHR.

**NOTE:** It is recommended that only clinically relevant patient notes are transmitted to the DIS. Patient notes such as '*Deliveries to Side Door*' or '*Do not cash cheques*' <u>should not</u> be transmitted to the DIS.

To add a patient note, do the following:

- 1. Search for and select the desired patient.
- 2. Select the Notes tab.
- 3. Select the Add button located at the bottom. A new patient note row will appear.
- 4. From the dropdown menu, select the type of note you are entering.

McKesson, E 3	Brd Party	Clinical	Profile	History	Consult	Preferen	ices 🛛 🛛	Notes
							- Patie	nt Mode
<u>E</u> HR Query		Ale	ert Print	Private El	HR RX#	User	Date	
GEN 🔽		I				PR Jan	21, 2015 1	7:33
DI Diad	gnostic Ima	ge Note					op 21, 2011	- 1
GEN Ger	neral Note				[		anzi, zvi	,
IMM Imm	nunization							
LAB Lab	oratory Not	e						
MED Med	dication Not	e						
PI Pati	ent Instruct	tions						
			-	<u> </u>				

- 5. Enter your note text.
- 6. If the note should be added to the patient's EHR, select the **EHR** checkbox.
- 7. Select the Save button.
- **NOTE:** If you selected the **EHR** checkbox, a validation prompt will display to confirm that you would like to save the note to the patient's EHR.

#### Pharmaclik RX

#### **Deleting Patient Notes**

If a note was added to a patient's EHR, then you are only able to delete the note from the EHR if it has not already been viewed by any other user connecting to the DIS. You can, however, still delete the note locally from PharmaClik Rx. To delete a patient note, do the following:

- 1. From the Patient Folder, select the **Notes** tab.
- 2. Highlight the note you wish to delete.
- Select the **Delete** button. If the note was transmitted to the DIS and viewed by another user, the following Detected Issues error will appear:



4. Select the **OK** button. Another validation prompt will appear:

Pharma(	maClik Rx - Patient Maintenance	
?	The request to remove from the Patient's EHR was not succes Do you wish to remove the note locally?	sful.

5. Select the Yes button if you wish to delete the note from PharmaClik Rx.



## **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 renaming of a field and the addition of a new field to accommodate various categories of health care professionals for eHealth.

## Provider Registry Search

When adding new doctors to your Doctor File, you can search a provincial database of doctors, also known as the Provider Registry (PR). The PR provides a single 'source of truth' for identification, demographic and credential information of health service providers supporting the EHR in Nova Scotia by:

- Providing reliable and accurate provider demographic and credential information for health service systems; and,
- Linking local provider identifiers from the trusted sources of provider information within the Provider Registry to allow a single, ubiquitous identifier for that individual for all health service events.

When searching the PR, wildcard searches are not permitted (exact search only). The PR also does not maintain out of province providers, however it will include all providers that are authorized by the Nova Scotia Prescription Monitoring Program (including out of province providers that have registered with the PMP). Currently, the health service providers included in the PR are:

- Pharmacists
- Physicians
- Registered Nurses
- Nurse Practitioners
- Dentists
- Dental Hygienists (Will be in the future)
- Midwives
- Optometrists

The Provider Registry Search window can be invoked from the following 2 locations:

- 1. **MD Match button** (from the Doctor Search window)
  - From the Doctor Search window, select the **MD Match** button.
- 2. **Doctor Compare button** (from an existing Doctor Folder)
  - In the main tab of a Doctor Folder, select the **Compare** button located at the bottom.



#### **MD Match Button**

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.



5. The 'Provider Registry Search' window opens with the search criterion displayed. Select the **Search** button.

Last Name	First	Phone	Address	City	License#	NS Type		
ames	Jesse						-	-
							▼	_
		111					*	
					S	earch	Clear	
							0.000	_
Last Name	First Name	Phone	Ad	dress	License#	City	Do	00

- 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.

#### Pharmaclik RX

#### **Doctor Compare Button**

If the Doctor is saved locally within PharmaClik Rx, you can use the Compare function to view the provider information on the EHR and compare it with the information you have saved locally.

To search the Provider Registry using the compare button, do the following:

- 1. Search for and select the desired doctor.
- 2. In the main tab of the Doctor Folder, select the **Compare** button. A Provider Registry search if performed.
- 3. If no search results are returned, revise your search criteria and select the **OK** button. Once a match is found, the 'PharmaClik Rx Doctor Registry' window appears.

💠 PharmaClik Rx -	Doctor Registry		×
PharmaClik Rx—		1	Doctor Registry
License #:	2224		2224
NS Type:	Medical Doctor		Medical Doctor
Role Type:	NS Medical Doctor		NS Medical Doctor
First Name:	JAMES		JESSE
Last Name:	JESSE		JAMES
Middle Name:			
Status:	Active		Active
Address Line 1:	345 Pine Crest Drive		345 Pine Crest Drive Suite 102
Address Line 2:			
City:	Centreville		Centreville
Province:	Nova Scotia		Nova Scotia
Postal Code:	B4F3Y6		B4F3Y6
Phone:	9024564444		
	4 111 1		4 111 1
		]	,
			Select All
<u>R</u> evert			<u>Q</u> K <u>Q</u> ancel

**NOTE:** Your search criteria must include the Provider ID and the NS Type.

- 4. Highlight all fields you wish to copy from the EHR and select the directional arrow . The information will be copied over.
- 5. Once done, select the **OK** 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. A default provider, however, cannot be used to fill controlled substances. Use of default providers will be monitored by the NS government. Ensure that a default provider is <u>only</u> used when the provider cannot be found in the Provider Registry.

**NOTE:** MD Match will only locate doctors registered with the Nova Scotia Medical Board. Most out of provinces doctors will not be found, unless they are registered with the Prescription Monitoring Program.

To use a default provider, you must do the following:

- 1. Exhaust all search options prior to using a default provider to ensure the provider does not exist in the Provider Registry.
- 2. Create a new Doctor Folder for the provider.
- 3. Update all necessary information in the Doctor Folder with the provider's correct information.
- 4. In the main tab, ensure to set the appropriate:
  - Prescriber Type
  - Role Type
  - NS Type
- **NOTE:** If you have a License # that will be accepted by the Third Party payors, then ensure to record this # in the *License* # field and set the *NS Type* to one of the below options. When the NS Type is set it will automatically send the Default # to the NS DIS and the License # to your Third Party payors for adjudication.

NS Type	License # sent to the DIS
Out of Province Doctor	DFMD99
Out of Province Dentist	DFDEN99
Out of Province Midwife	DFRM99
Out of Province Hygienist	DFDH99
Out of Province Registered Nurse Practitioner	DFRNP99
Out of Province Pharmacist	DFPHC99
Out of Province Registered Nurse	DFRN99
Out of Province Optometrist	DFOPT99
Other Practitioner	DFOTHER99

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:

#### Nova Scotia eHealth User Guide



JAMES, JESSE	History	·	Ø	Notes
Last Name: JAMES	ReAuth Method:	Phone	Doctor #:	53 Nar Res:
First Name: JESSE	Prescriber Type:	Newfoundland -	License #	DFMD99
Mid Name:	Role Type:	Medical Doctc 👻	] TP Licen#	
Language: English 🗨	NS Type:	Out Of Provinc 🗸	Status:	Active
here	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	///····	ي	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~

#### Pharmaclik RX

## Role Type and NS Type Fields

The **Role Type** is a mandatory field for DIS transactions. It further defines the Prescriber Type (i.e. Prescriber Type of College of Physicians and Surgeons Nova Scotia) The **NS Type** is a mandatory field that is used to support an alternate format and/or value of the prescriber license number within DIS messages. Upon DIS activation these fields will be automatically populated based on the Prescriber Type. Both of these dropdown fields will be sorted alphabetically.

Burke, Natalie	History		Û		Notes
Last Name: Burke	ReAuth Method:	Phone	• 0	)octor#:	78 Nar Res:
First Name: Natalie	Prescriber Type:	Provincial De	n 🔻 L	icense #:	030320000
Mid Name:	Role Type:	Dentist	<b>•</b> T	P Licen#	8888
Language: English	NS Type:	NS Dentist	👻 S	Status:	ACTIVE
And many more thank	mont		$\sim$	m	

#### TP Licen# Field

The **TP Licen#** field is a new field that allows you to enter a different license # for the prescriber in instances where the license # accepted by the Nova Scotia DIS is different than the license# accepted by third parties.

For example, when submitting claims to MSI Pharmacare for a New Graduate or Dentist prescriber, MSI Pharmacare accepts a different license# than the Nova Scotia DIS. If you do not enter this license# in the *TP Licen*# field, your claim will be rejected by the third party.

Burke, Natalie	History	0	Notes
Last Name: Burke	ReAuth Method: Pho	one 🕎 Doctor#:	78 Nar Res:
First Name: Natalie	Prescriber Type: Pro	vincial Den 👻 License #	#: 030320000
Mid Name:	Role Type: De	ntist 💽 TP Licen	# 8888
Language: English 🗨	NS Type: NS	Dentist 🗨 Status:	ACTIVE -
hard many many many many	mon -	man when the second	hard and the second



#### Status Field

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

- Active
- Suspended
- Terminated

Burke, Natalie	History		9	Notes
Last Name: Burke	ReAuth Method:	Phone 💌	Doctor #:	78 Nar Res:
First Name: Natalie	Prescriber Type:	Provincial Den 👻	License #	: 030320000
Mid Name:	Role Type:	Dentist	TP Licen#	*.8888
Language: English 🗨	NS Type:	NS Dentist 두	Status:	ACTIVE
Production and and and and and and and and and an	mont		~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~

Users are only able to transmit claims to the DIS with a prescriber that has a status of 'Active'. If the prescriber status is not 'Active', PharmaClik Rx will return a 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





#### DIS Type

The DIS Type selection determines if the drug will be submitted using the prescription message, the device message, or not submitted at all. 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.
- **Device** Device message will be used.
- Non-DIS Prescriptions for this type will not be transmitted to the DIS.



When the **DIS Type** is 'Device' the DIS DIN/PIN and Type fields must be populated. For more information, refer to the <u>DIS DIN/PIN and Type</u> section.

DIN 2041294	Auxiliary	Alternatives	Compa	nion	Inven <sup>.</sup>	tory	History	0	Notes
Drug								54	8 6
Generic: AM	10×ICILLIN		Rpl DIN:						OTC
Trade: AM	10×IL		Prov \$:				Capped Mf	r\$	
Tall MaN:			Strgth:	250MG			Innovator		
Ther Class: PE	NICILLINS	•	Mfr:	WAY			Narcotic		PFS
Schedule: Sc	hedule I	•	Print:		-		Reportable		
Drug Form: CA	PSULE	•	Auto Disp:	No auto	o-d ▼		Shrink Labe	əl	
Colour:							Mixture		
Default SIG		•	DIS Type:	Rx	•		High Alert		
Enterprise:		•	Route	Rx Device					
				Non-DI	s				
Last McKesson:	Mar 08, 2014	🗆 🛛 Block U	Ipdates	Last R	x Date:				Inactive
www.			$\sim$	$\sim$	-		$\sim$		

The **DIS Type** of 'Non–DIS' should 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).



To modify the DIS Type from the Drug 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 **DIS Type** dropdown menu and select a value that is appropriate for the mixture (i.e. Rx). For more information, refer to <u>DIS Type</u> section.

PIN -52	Auxiliary	Alternatives	History	0	Notes
Name: H		PWD 1% IN CANESTE			<b>.</b>
	DROCONTISONE	FWD 1% IN CANESTE		otic   L	Jynamic Uty 🔛
	JMPOUND		l Rep	ortable 📃 N	Narcotic Print
Compound: T	opical Cream	Mixture Qty:	100.00 🗆 Meth	nadone	
Schedule: S	chedule I	Mixing Time:	10 Last Rx [	Date:	
Default SIG:		💌 🔲 Pro-Rate Mi	xing Time 🔲 Sk	nrink Label	Inactive
		DIS Type: Rx	Route:	MISCELLA	NEOUS -
	Le	and have the second	~~~~~	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	m

- 3. Ensure that the **DIS DIN/PIN** value and **Type** are populated correctly. For more information, refer to the <u>DIS DIN/PIN and Type Fields</u> section.
- 4. Select the Save button.

Once a prescription has been filled, the DIS Type <u>cannot</u> be changed. If the DIS Type dropdown changes between refills, users will get a validation prompt stating: *This prescription was previously recorded as a Prescription Rx/Device/Non-DIS Type. Type cannot be modified. Prescription status must be updated.* PharmaClik Rx will then determine the appropriate function based on the following table:

Current DIS Type	New DIS Type	Resolution
		You must "abort" the previous Rx and create a Device Rx.
Ry		You must "abort" the previous Rx and create a Non-DIS Rx.
	5	You must "abort" the previous Device Rx and create a new
		You must "abort" the previous Device Rx and create a
	5	You must "abort" the previous Non-DIS Rx and create a
	<b>C</b> .	You must "abort" the previous Non-Device Rx and create a



#### 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 user will be prompted to make a selection from the dropdown menu.

To modify a Route value 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).

PIN -52	Auxiliary	Alternatives	History	0	Notes
Name: US				. –	
Name: H	TURUCURTISUNE	PWD 1% IN CANESTE	N Darc	otic 📃 🛙	)ynamic Qty 👱
0	OMPOUND		🗌 🕅 Repo	ortable 🥅 N	arcotic Print
Compound: To	opical Cream	Mixture Qty:	100.00 🗌 Meth	nadone	
Schedule: Sc	chedule I	Mixing Time:	10 Last Rx [	Date:	
Default SIG:		💌 🔲 Pro-Rate Mi	xing Time 🔲 Sh	nrink Label 🖡	Inactive
		DIS Type: Rx	Route:	MISCELLA	NEOUS 👻
m	Le	- And a	~~~~	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	m

- 3. Ensure that the **DIS Type** field is populated correctly. For more information, refer to the <u>DIS Type</u> section.
- 4. Ensure the **DIS DIN/PIN** value and **Type** are populated correctly. For more information, refer to the <u>DIS DIN/PIN and Type</u> section.
- 5. Select the **Save** button.



When mixtures are created they should be clearly identified by the Generic/Trade Name description as this is the value that will be viewed by other health professionals when they are looking at patient's EHR. It is also imperative that all ingredients within a mixture have proper DINs and/or PINs.

# \* Pharmaclik

## DIS DIN/PIN and Type Field

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 <u>must</u> 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 Nova Scotia.
- **Natural Product** Used when the DIS Type is *Rx* and the product has a NPN.
- **OPINIONS** Used only when the DIS Type is *Device*.

	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	Ann	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	m
Custom Class	DIS DIN/PIN	1950606 <b>Туре</b> :		
Third Party Plan	Cu: Regular	stom Class	DIN Natural Product	Add
			PIN OPINIONS	R <u>e</u> move

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 TYPE**, **DIS DIN/PIN** or **Type** have changed. The date entered, user and event will also be recorded for reference.

	DIN 1950606	Au	xiliary Alte	matives	Compar	ion Inventory	History	Note:
	Entered	User	Event	Act	ivity	Cor	nments	
	Feb 09, 2012	RP	DIS DIN/PIN	TChanged		OPINIONS.		
	Feb 09, 2012	RP	DIS DIN/PIN	TNew		DIN.		
	Feb 09, 2012	RP 🚙	DIS DIN/PIN	New		DIS DIN/PIN 1950	606. 👝	
٦		and a	$\sim$	·····	~~~~			Marra Marra



## Setting Up a Drug as a Device

The **DIS Type** selection determines if the drug will be submitted using the prescription message, the device message, or not submitted at all. In the province of Nova Scotia all Devices <u>must</u> be recorded with a Type of OPINIONS. For more information, see the <u>DIS DIN/PIN and Type</u> 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.

DIN 9689999	3	Auxiliary	Alternatives	Compa	anion	Inver	ntory	History	0	Notes
Drug										neal level
Generic: 🛛	4ERO	СНАМВЕР	R (ADULT)	Rpl DIN:					<u>0</u>	道 💼 отс
Trade: 🛛	AERO	CHAMBEF	RADULT	Prov \$:	\$	3.0000	□ (	Capped Mfr :	\$	
TaLL MaN:				Strgth:				nnovator		
Ther Class:	MISCE	ELLANEOU	JS 🔻	Mfr:				Varcotic		PFS
Schedule:	Sched	ule IV	•	Print:		-	E F	Reportable		
Drug Form:	MISCE	ELL	•	Auto Disp:	No aut	o-d 🔻		Shrink Label		
Colour:								Mixture		
Default SIG			•	DIS Type:	Device	•	Ē	High Alert		
Enterprise:			•	Route	MISCE	LL 🔻				
·	$\sim$	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	~~~~			~~~		~~~	

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

	111	
ustom Class	DIS DIN/PIN: 96899993 Type: OPINIONS	
Third Party Pla	n Custom Class	
		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 with a Natural Product Number

Natural health products are safe to use as over-the counter drugs and do not require a prescription to be sold. In order to identify them, these products are given a unique Natural Product Number (NPN). Natural health products can be defined as:

- Vitamins and minerals
- Herbal remedies
- Homeopathic medicines
- Traditional medicines (i.e. Traditional Chinese medicines)
- Probiotics
- Other products like amino acids and essential fatty acids

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 <u>already exists</u> 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.

New	Auxiliary	Alternatives	Companion	Inventory		History	Ø	Notes
– Drug –							5.1	
Generi	: PROBIC	DTIC	Rpl DIN:		]		<u>1</u>	OTC
Trade:	DIEM P	ROBIOTIC	Prov \$:			Capped Mf	r\$	
TaLL M	aN:		Strgth:	10 BILLION		Innovator		
Ther Cl	ass: MISCEL	LANEOUS	▼ Mfr:	DIM		Narcotic	F	- нат
Schedu	ule: Schedu	le III	▼ Print:	Generic & 🔻		Reportable		
Drug F	orm: CAPSU	LE	🔻 Arto Disp	No auto-d 🔻		Shrink Lab	əl	
Colour:						Mixture		
Default	SIG		DIS Type:	Rx 💌		High Alert		
Enterpr	rise:		▼ Route	ORAL 💌				
~		~		distance.	_		_	
. Set M	- CORV	And the second second	www.	w at			$\mathcal{T}_{\nabla}$	min l



- 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.

Jum market	man the man	- And Marken
Custom Class DI	S DIN/PIN:   58203874 Type:  Na	tural Product 💌
Third Party Plan	Custom Class	
		R <u>e</u> move

- 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.
- I. Select the Save button.



## Dispensing a Product with No DIN/NPN

When dispensing 'Device' prescriptions the drug associated with the Device will be entered using an OPINIONS PIN (i.e. blood glucose monitoring devices, Aerochambers©). The OPINIONS PINs are assigned by Atlantic Pharmaceutical Services Inc. (APSI). Pharmacies are required to have a subscription to APSI. OPINIONS PINs are intended to be used when there is no drug identification number (DIN) or natural products number (NPN) for a product being dispensed.

Due to the number of OPINIONS PINs required and the length of time it takes to obtain a new OPINIONS PIN, pharmacies can now dispense products using a generic OPINIONS PIN, when the appropriate OPINIONS PIN cannot be found. All users should ensure they have exhausted all search options for the appropriate OPINIONS PIN. The generic OPINIONS PIN is 92099982 and the description is "DIS Generic PIN", however locally the description must clearly identify the product.

It is important to note the following:

- The generic OPINIONS PIN should **only** be used for those products where there is no product specific OPINIONS PIN available.
- Pharmacies are to continue using product specific OPINIONS PIN when they are available, as they will still be required for third party online billings and will still be accepted when submitted to the DIS. Their use is also preferred as it improves the quality of the data in the DIS and will help facilitate e-Prescribing.
- As the generic OPINIONS PIN can be used for many different devices, the pharmacy is required to enter the product description for the actual device. The DIS will display the product description as entered in the pharmacy system.
- The DIS Program will be monitoring the use of the generic OPINIONS PINs to determine where new OPINIONS PINS may be required.

To dispense a product with no DIN/NPN, do the following:

- 1. Select the **Drug** button.
- 2. Search for the drug 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 product you wish to dispense.
  - **NOTE:** Other users viewing a patient profile in the DIS will see the product description as entered by the pharmacy, so product descriptions should continue to be as specific as possible.
- 5. From the **DIS Type** dropdown list, select Device.
- 6. Select the Alternatives tab.





7. In the **DIS DIN/PIN** field, enter the DIN 92099982.

A marker and a marke	<pre>&gt;&gt;&gt;&gt;&gt;&gt;&gt;&gt;&gt;&gt;&gt;&gt;&gt;&gt;&gt;&gt;&gt;&gt;&gt;&gt;&gt;&gt;&gt;&gt;&gt;&gt;&gt;&gt;&gt;&gt;&gt;&gt;&gt;&gt;&gt;</pre>
Custom Class DIS DIN/PIN: 92099982 Type	
Third Party Plan Custom Class	
	Add
	R <u>e</u> move

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





## The Mixtures Folder

#### **Prescription Monitoring Program Mixture PINs**

With DIS integration the list of monitored mixture/compound PINs used previously is now replaced by the following list:

Nova Scotia Prescription Monitoring Program Drug	Opinions PIN
Belladonna Tincture	99099966
Cocaine Powder	99099974
Codeine Powder	99099975
Dexedrine Trial	99099976
DHEA (prasterone)	99099977
Diazepam Powder	99099963
Fentanyl Powder	99099978
Generic Monitored Ingredient	99099979
Hydromorphone Powder	99099980
Ketamine Powder	99099981
Methadone Powder	99099993
Methylphenidate Trial	99099984
Midazolam Powder	99099964
Morphine Powder	99099986
Sativex Trial	99099991
Testosterone Powder	99099965

If the monitored mixture/compound ingredient has a DIN, the DIN is to be recorded as the ID # in the 'Drug Ingredient Details'.

**NOTE:** The PM bill code will no longer be available for selection in PharmaClik Rx as all monitored transactions automatically get submitted to the Prescription Monitoring Program through the DIS.





## Filling Mixture Prescriptions Containing Narcotics

As a DIS enabled pharmacy, you must submit all prescriptions to the DIS, including mixtures that contain narcotics; however, your pharmacy can do so without indicating your proprietary mixture recipes. Non-monitored ingredients may also be listed, but are **not** required. When filling mixture prescriptions that contain monitored ingredients (drugs that are flagged as a Narcotic), they must be recorded in the DIS with the following information:

- A free text description of the compound; and
- The monitored drug ingredient(s) represented by:
  - The name of the ingredient
  - The ID # either the DIN or the OPINIONS PIN
  - The <u>quantity</u> of ingredient used in the compound

To fill a mixture prescription that contains at least one narcotic ingredient, do the following:

- 1. Open an incomplete mixture prescription in RX Detail.
- 2. Enter the Generic Name of the compound in *Name* field (i.e. **Testosterone 2mg/ml Topical Cream (PUMP**)).
- 3. Add the description of the ingredients that are not considered a narcotic drug (i.e *DRUG INGREDIENT 1*, *DRUG INGREDIENT 2*).
- 4. Add the ingredients within the mixture that are deemed a narcotic drug (i.e TESTOSTERONE). In order for a drug to be a narcotic, the Narcotic checkbox must be selected. In the example Mixture Folder below, DIN 99099965 is a narcotic drug.

PIN	-564	Auxiliary	Alterna	tives	History	0	Notes
Name	e: Test	osterone 2mg/ml T	opical Cream	(PUMP)		rcotic 🗖	Dynamic Qty
Comp	ound: Topi	ical Cream	▼ Mixture	e Qity: 3	0.00 🔽 Me	thadone	Narcouc Fini
Sche	dule: Sch	edule I	▼ Mixing	Time:	1 Last Rx	Date: Jar	07, 2015
Defa	ult SIG:		DIS T	p-Rate Mixing ype: Rx	Time 🗖 9	ihrink Label ::  ORAL	☐ Inactive
Ranl	k DIN/PIN	Ingredien	t Name	S	ize	Qty	Add
1	-285	DRUG INGREDIE	NT 2	500 - Inv	#1 🗾	1.0000	
2	-226	DRUG INGREDIE	INT 2	500 - Inv	#1 💌	28.0000	<u>R</u> emove
3	99099965	TESTOSTERONE	E	1 - Inv #1	-	1.0000	Interchangeable

- 5. Continue filling the prescription as per normal process.
- **NOTE:** If a narcotic drug is a Free Form drug, you <u>must</u> ensure the *DIS DIN/PIN* and *Type* fields (in the **Alternatives** tab within the Drug Folder for the narcotic drug) are populated for the mixture in order to identify the narcotic ingredient.



## Filling Mixture Prescriptions Containing Targeted Substances

PharmaClik Rx supports the transmission of mixtures claims containing Targeted Substances to the Nova Scotia DIS. As a DIS enabled pharmacy, you must submit all mixtures to the DIS, including mixtures that contain narcotics and targeted substances.

When filling a prescription for a mixture that contains narcotics or targeted substances, no further action is required by your store in order for this claim to be captured by the Nova Scotia Prescription Monitoring Program (NSPMP). With the implementation of the DIS, the NSPMP receives all claim information when a narcotic or targeted substance is dispensed.

**NOTE:** In order for DIS pharmacies to process targeted substance prescriptions, prescribers must be registered with the NSPMP, including out of province prescribers.

When filling mixture prescriptions that contain monitored ingredients (drugs that are flagged as a Narcotic or Targeted substances), only the ingredients within the mixtures that are Narcotic or Targeted substances will be transmitted. Non-narcotic ingredients will not be sent to the DIS. It is imperative that at least one ingredient must be:

- An Opinions PINS provided by NSPMP
- A Narcotic Prescription

To fill a mixture prescription that contains at least one Targeted Substance ingredient, ensure you do the following when creating your mixture:

- 1. Select **More** > **Mixture**.
- 2. Search for your mixture. When no results are returned, select the **New** button
- 3. Enter the Generic Name of the compound in *Name* field (i.e. Lorazepam 1.5mg/mL Oral Solution).
- 4. Add the description of the ingredients that are not considered a narcotic drug (i.e. *DRUG INGREDIENT 1*, *DRUG INGREDIENT 2*).
- 5. Add the ingredient(s) within the mixture that are deemed a targeted substance (i.e. LORAZEPAM).
- 6. Select the **Save** button. Your completed Mixture Folder will appear similar to the image shown below.



PIN	I -40		Auxiliary	Alternativ	es	Hi	story	0	Notes
Name	e: [9	Samı Samı	ple Lorazepam wi ple Lorazepam wi	th Ingredients ( th Ingredients (	Compoun Compoun	d d Eque	▼ Narc	otic 🗖	Dynamic Qty 💩 Narcotic Print
Comp	ound: [	Торі	cal Cream	▼ Mixture	Qty:	75.00	Meth	adone	
Sched	dule: 🛛	Sche	dule I	▼ Mixing	Fime:	1	Last Rx D	ate:	
Defau	ilt SIG:	_		- Pro	-Rate Mix	king Tim	ne 🗆 Sh	rink Label	Inactive
				DIS Ty	pe: Rx	•	Route:	MISCELL	ANEOUS 👻
Rank	DIN/F	NIN	Ingredien	t Name		Size		Qty	Add
1	235107	2 1	LORAZEPAM		0 - Inv #	1	▼ 25	.0000	
2	-36	(	Drug Ingredient 1		1 - In∨#	1	▼ 25	.0000	<u>R</u> emove
3	-37	l	Drug Ingredient 2		1 - Inv #	1	▼ 25	.0000	Interchangeable
( [ 	\ <b>-</b> -	~~~	$\sim \sim \sim$	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	~	~~~~/		~~~~~

When you fill a prescription using the Mixture Folder you created above, the claim will appear on the patient's EHR Profile, similarly to how it is displayed below:

EHR -	Rx : MCKESSO	n, anthony f	PHN 222				
Profile Type	Information — E All	•	So	urce: Combined		<u>C</u> ondens	e
Local	Service Date DIS ID	Type Status	lssue: Notes	s Product Information	Qty DS	REM QA	^
V	Nov 24, 2015 2645	Rx active		Sample Lorazepam with Ingredient	ts Cc 75	75 150	Ξ
,		ᡐᠷᡗ᠋ᡃᠧᠵ᠆᠆	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	Mr	$\sim$	~~~~~	1



## Location Registry Search

The DIS includes a Location Index, which provides information for pharmacies referenced in the DIS and also includes information for default locations used in the DIS (i.e. Default Provider Office). Locations are identified in transactions transmitted to the DIS by an identification number, as assigned by the appropriate organization (i.e. pharmacy license number assigned by Nova Scotia College of Pharmacists). This location identification number must be entered in the <u>Provincial ID</u> field in PharmaClik Rx.

If the location identification number is not available within PharmaClik Rx, the user may choose to search the Location Index to find the information from two locations depending on the Location Type (Groups or Other Pharmacy). If a Location still cannot be found, then the user can use a default location. For more information on how to do this, see the <u>Using Default</u> <u>Locations</u> section. When searching the Location Index, you can search from two locations:

- Groups (More > Groups > Compare); or
- Other Pharmacy (More > List Maint. > Other Pharmacy > Compare).



When searching the Location Registry you must search using the exact store name; a wildcard search is not permitted on the Location Registry.

## **Provincial ID**

The **Provincial ID** field indicates the unique location identification number assigned to the facility. In Nova Scotia, only pharmacies will be assigned unique identifiers. Other location such as Clinics, Hospitals or Out of Province locations will use a general identifier. This field is required when updating a pharmacy record to complete a Transfer. When time permits, it is recommended that your pharmacy update commonly used records.

For out of province pharmacies, all the information entered in the record will be actual information for that pharmacy (i.e. address, phone number etc.). The Provincial ID for all out of province pharmacies, however, will be the same out of province identification number. For more information on obtaining the provincial ID for out-of-province pharmacies, see the <u>Using Default</u> <u>Locations</u> section.

## **Provincial ID for Groups**

All locations authorized to provide or receive service will be identified uniquely by Nova Scotia's Location Registry. This includes group facilities such as Nursing Homes, Doctors Offices, and or Clinics. In order to process Emergency/Ward Stock or Office Supply it is necessary to create a Group that matches this location and a 'facility patient' will be created for the corresponding facility.



#### Searching for the Provincial ID of an Existing Group/Facility Patient

- 1. Select **More** > **Groups**. The 'Group Search' window appears.
- 2. Search for and select the desired group.
- 3. Select the **Compare** button. The 'Location Registry' window appears.

ırmaClik Rx—			Location Registry
D:	950		950
rov Code:	NS Community Pharmacy		NS Community Pharmacy
ame:	Dartmouth Gate Pharmacy		Dartmouth Gate Pharmacy
ther Name:	banu		
ype:			
ddress Line 1:	375 Pleasant Street		375 Pleasant Street
ddress Line 2:			
ity:	Dartmouth		Dartmouth
Province:	Nova Scotia		Nova Scotia
Country:	Canada		CANADA
Postal Code:	B2Y4N4		B2Y4N4
hone:			
Status:			active
	4	h	

- 4. Highlight any fields you wish to copy from the Location Registry and select the directional arrow .
- 5. Select the **OK** button.



#### **Creating a New Group/Facility Patient**

- 1. Select **More** > **Groups**. The 'Group Search' window appears.
- 2. Enter your search criteria and select the **Search** button. The result should indicate '*No Results Found*'.
- 3. Select the **New** button. The following prompt will appear:

Pharma	Clik Rx - Groups
?	Do you wish to search the Location Registry?
	<u>Yes</u> <u>N</u> o

- 4. Select the Yes button. The 'Location Registry Search' window appears.
- 5. Refine your search criteria.
- 6. Select the Search button. The Location Registry Search results will be displayed.
- 7. Highlight the corresponding record and select the **OK** button. The Group Folder will be populated with the information that is currently found in the Location Registry including the Provincial ID.

Location Registry Search				×
Name	Other Name	Туре	Address	
Dartmouth Gate			•	
•	111			•
	Reco	ds Found	<u>S</u> earch	Clea <u>r</u>
Name	Other Name	Address	City	
Dartmouth Gate Pharmacy		375 Pleasant Stree	t Dart	mouth
And marken				

- 8. Update any additional information such as: Type, Sub Type, Status, Short, Phone, Mobile, Fax and/or Email.
- 9. Select the **OK** button. The group will be saved, and a facility patient will be automatically added.



#### Provincial ID for Other Pharmacy

The Other Pharmacy is used to record prescription transfers in and out from other pharmacies. There will be two new fields to identify these pharmacy locations:

- Prov Code field indicates the type of Location in the NS Location Index.
- **Provincial ID** field indicates the unique identifier assigned to the pharmacy by Nova Scotia.

Pharmacy Name			Add
C.W. Fraser Pharmacy Ltd.			
Default Non-NS Pharmacy			<u>Remove</u>
Donna's test drug mart		≡	<u>C</u> ompare
Drugstore Pharmacy #312			
Mckesson TEST Pharmacy on 132			
Metropolitan Dispensary			
RICH PHARM			
Sam's Pharmacy			
Sharecare Homes 2000		-	
Addr Line 1: 8 Pictou Road	Phone: () -	7 0	Digit local 🔻 ext
Addr Line 2:	Alt Phone:	7 0	igit local 💌 ext
City: Truro 💌	Fax:	7 0	igit local 💌
Province: Nova Scrtia 🗨	E-mail:		
Post Code: PM2R8	Country: CANADA		•
Provincial ID: 237	Prov Code: NS Community P	narmac	у 🔻



#### Searching for the Provincial ID of an Existing Other Pharmacy

To search for a Provincial ID of an existing Other Pharmacy that you already have added to your Other Pharmacy list, do the following:

- 1. Select **More** > List Maint.
- 2. From the dropdown list, select Other Pharmacy.
- 3. Highlight a pharmacy.
- 4. Select the **Compare** button. The 'Location Registry' window appears.

💠 PharmaClik Rx - Location Registry 🛛 🛛 🔀					
PharmaClik Rx		1	Location Registry		
ID:	237		237		
Prov Code:	NS Community Pharmacy		NS Community Pharmacy		
Name:	C.W. Fraser Pharmacy Ltd.		C.W. Fraser Pharmacy Ltd.		
Other Name:					
Туре:					
Address Line 1:	8 Pictou Road		8 Pictou Road		
Address Line 2:					
City:	Truro		Truro		
Province:	Nova Scotia		Nova Scotia		
Country:	CANADA		CANADA		
Postal Code:	B2N2R8		B2N2R8		
Phone:					
Status:			active		
	4 III >		4 III >		
			Select All		
<u>R</u> evert			<u>O</u> K <u>C</u> ancel		

- 5. Highlight fields from the Location Registry that you wish to copy over to PharmaClik Rx.
- 6. Select the left directional arrow store to copy the information.
- 7. Select the **OK** button. The Group Folder will appear and be populated with the information from the Location Registry.
- 8. The Provincial ID will be located at the bottom, as shown below. Update any additional information, such as **Phone**, **Mobile**, **Fax**, and/or **Email**.

have have have a second	have have a second and have a
Addr Line 1: 8 Pictou Road	Phone: () - 7 Digit local 💌 ext
Addr Line 2:	Alt Phone: 7 Digit local 🗨 ext
City: Truro 💌	Fax: 7 Digit local 💌
Province: Nova Scotia. 🗨	E-mail:
Post Code B2N2R8	Country: CANADA
Provincial ID: 237	Prov Code: NS Community Pharmacy 🗾

9. Select the **OK** button.



#### **Searching for a New Other Pharmacy**

To search for a Provincial ID of a new Other Pharmacy that does not already exist in your Other Pharmacy list, do the following:

- 1. Select **More** > List Maint.
- 2. From the dropdown list, select **Other Pharmacy**.
- 3. Select the Add button. A new row appears.
- 4. Enter the desired group name and select the **Compare** button. The following prompt appears:



- 5. Select the **Yes** button. The 'Location Registry Search' window appears.
- 6. Re-enter your search criteria and select the **Search** button.

**NOTE:** The recommended method for searching in the Location Registry is the Pharmacy Name.

- Once the desired results are returned, highlight the record and select the OK button. The Group Folder will appear and be populated with the information from the Location Registry.
- 8. The Provincial ID will be located at the bottom, as shown below. Update any additional information, such as **Phone**, **Mobile**, **Fax**, and/or **Email**.

Addr Line 1: 8 Pictou Road	Phone: () - 7 Digit local V ext
Addr Line 2:	Alt Phone: 7 Digit local 💌 ext
City: Truro 💌	Fax: 7 Digit local 💌
Province: Nova Scotia 🗨	E-mail:
Post Code B2N2R8	Country: CANADA 💌
Provincial ID: 237	Prov Code: NS Community Pharmacy

9. Select the **OK** button.



## Using Default Locations

If you are unable to find a location (i.e. a nursing home, pharmacy, long term care facility etc.) you can use a default location to transmit transactions to the DIS. When using default locations, all the information entered in the record will be actual information for that pharmacy (i.e. address, phone number etc.). The Provincial ID for all out of province pharmacies, however, will be the same.

To use a default location, do the following:

- 1. Select More > Groups.
- 2. Select the **New** button. The following prompt appears:

PharmaC	lik Rx - Groups
?	Do you wish to search the Location Registry?
	<u>Y</u> es <u>N</u> o

- 3. Select the **No** button.
- 4. Enter in the following information for the location you could not find:
  - Name Name of the location you could not find.
  - Short Short name of the location (i.e. Jack's PEI Pharmacy's short name can be JPP).
  - Type Select the type of location it is.
  - Sub Type Daily.
  - Address Address of the location.
  - **Phone** Phone # of the location.
- 5. Enter the appropriate **Provincial ID** and **Link** using the following table:

Provincial Code	Provincial ID	Link
Default Non Nova Scotia Pharmacy	DF002	Non-NS Pharmacy Default
Default Provider Office	DF001	NS Default Provider Office
Default Nova Scotia Long Term Care Facility	DF004	NS Long Term Care Facility
Default Non Nova Scotia Long Term Care Facility	DF003	Non-NS Long Term Care Facility





6. Select the **Save** button. You can now use this default location to fill prescriptions to. Your default location will look similar to the following:





When using a default location, it is possible that multiple locations locally in PharmaClik Rx may have the same Provincial ID (i.e. multiple Out of Province pharmacies). If prompted, select the **Yes** button to save the record using the same Provincial ID.

PharmaClik Rx - Validation Error							
?	Provincial ID already exists for MCKESSON PHARMACY. Do you wish to add a duplicate?						
	Yes <u>N</u> o <u>C</u> ancel						



## **Groups Folder**

#### **Facility Patient**

A Facility Patient is used to fill bulk stock or ward stock prescriptions for the facility. Facility Patients do not require synchronization and will not have an EHR. A Facility Patient is automatically added when a Group is added from the Location Registry Search. For more information, see the Location Registry Search section.

As per current functionality, a Facility Patient's **Birth Date** will be populated with the current system date and **Gender** can be entered as 'Unknown'.



Even though there may be multiple facility patients for a facility, all facility patients must have the same Provincial ID populated in the PHN field.

## Filling a Ward Stock Supply Prescription

Stock supplies, which are also referred to as 'ward stock' or 'stock transfers', or 'office use meds', are medications that are dispensed to a facility versus a specific patient. The medications are being supplied by a pharmacy to a prescriber or authorized location for office use. Ward stock supply prescriptions are also used for pharmacy to pharmacy transfers, see <u>Filling a Pharmacy-to-Pharmacy Transfer Prescription</u>. These prescriptions are recorded under the Facility Patients (refer to the <u>Facility Patient</u> section for more information). For a Ward Stock Supply, the Prescription Information section of Rx Detail will display 'Stock Supply'.





The Dispense section of the EHR tab will also display 'Stock Supply'.

Rx 503037; Donna'ε ✔ Auth: 503037 (Feb 17, 2015) Fill: Feb 17, 2015 Last Fill:								
Rx: 503037	Extended	EHR	Third Party	Notes				
Facility: Donna's I	Home DKH1			<u>H</u> elp Desk				
Create								
Rx ID:		No Sub:		<b>~</b>				
GCN/DIN/PIN:	2169908	Treatment Type:		•				
Prev. Rx ID:		Result:		5				
Orderable Form:		•	0 Detecte	ed Issue(s): 🖻				
Stock Supply Refusal to Fill								
DIS ID:		Fill Type:	FF - First Fill	▼				
DIN/PIN:	2169908	Sub Reason:		•				
Pharmacist:	PR 💌	Sub Code:		•				
		Post	man	many jut				

To fill a Ward Stock Supply, do the following:

- 1. Select **More** > **Groups**.
- 2. Search for and select the desired group.
- 3. Select the **Patients** tab.
- 4. Highlight the patient that has the Facility Patient checkbox selected next to their name.
- 5. Select the yellow folder  $\bowtie$  to open the Patient Folder.

Donna's Home Sched	ule   Batch History	Stan	ding Order	rs Pret	ferences	Pat	tients (3) 🔋 📕 🕨
Name	Facility Patient	Floor	Wing	Area	Room	Bed	
Donna's Home, DKH1	✓						
Katherine, Jack							Add
McKesson, Elvis						$\sim$	
							<u>R</u> emove
							A 🔁 🔁
		~~.			<u> </u>	~~~	m

- 6. Select the **Profile** tab.
- 7. Do one of the following:
  - Select the **New** button for a new Rx.
  - Highlight an existing Rx and select the **Refill** button.
  - **NOTE:** No EHR Profile will be displayed as the prescription is linked to a Facility and not to a real patient. The Rx will be placed on the To Do tab to be processed after you are done working with the Group.
- 8. From the Workbench, select the **To Do** tab.



- 9. Highlight the prescription and select the **Process** button. The prescription will open in RX Detail.
- 10. Ensure the **QA**, **QTY**, **DS**, and **SIG** are appropriate. If using this Rx for billing to the Group, ensure the Rx price is correct.
- 11. Select the **Fill** button.

The Prescription Information section of Rx Detail will display 'Stock Supply'. The prescription will be recorded by the DIS and the patient's local profile will be updated:

Donna's Home,	. D 3rd Pa	rty Clinical	Profile	History	Consult	Preferenc	es 🛛	Notes
Display Options         Display:       All         Deselect All       Condense         Active Only       Patient Mode								
Fill Date D	)rug Name	Form	Rx#	MFR	REM	Status	Active	
Feb 17, 2015 A	MOXAPINE;	ASENDIN TABLET	503037 100	LED AS DIR	0 FCTED	Complete	7	
	Janna,		~~~	<u> </u>	<b>_</b>	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	~~~	



Stock Supply prescriptions <u>cannot</u> be deferred. For more information on deferring prescriptions, see the <u>Deferring Prescriptions to the EHR</u> section.



### Filling a Pharmacy-to-Pharmacy Transfer Prescription

It is recommended that Pharmacy to pharmacy transfers use the same functionality as Ward Stock or Stock Supply. See Filling a Ward Stock Supply Prescription. Pharmacy records should not be added to the Client Registry.

Create or use an existing Group/Facility Patient and fill the prescription using the ward stock supply functionality. Once you have created a Group/Facility Patient for a transfer to a specific pharmacy, you will use this facility patient for all future stock transfers to this pharmacy.

To fill a pharmacy-to-pharmacy transfer prescription, do the following:

1. Search for an existing Group/Facility Patient *or* create a new Group/Facility Patient, see <u>Creating a New Group/Facility Patient</u>.

Name the Group/Facility patient with the name of the pharmacy that will be receiving the transfer; the Facility Patient will be the pharmacy.



2. See Filling a Ward Stock Supply Prescription and fill the stock supply for the Pharmacy you are transferring to.

The prescription will be identified as a Stock Supply prescription.

**NOTE:** When filling the office supply or pharmacy to pharmacy transfer, it is recommended to add a note in the SIG stating what the stock is being used (IE: Office Supply or Pharmacy-to-pharmacy transfer).

Use this patient for all future stock transfers to this pharmacy.



Performing a pharmacy-to-pharmacy transfer using the Animal patient status in the patient folder is not permitted.


# Filling a Prescription

All prescriptions <u>must</u> be added to the patient's EHR 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. A prescription may also be downloaded from the patient's EHR and then filled or transcribed from a written paper prescription and then filled.



The **EHR-ALL** profile must be viewed with each new patient encounter or after a 'break in service' has occurred. For more information, see the <u>Accessing a Patient's</u> <u>EHR</u> section.

### EHR Tab

The **RX Detail** > **EHR** tab indicates the DIS information associated with three prescription messages: Create (or Create Device), Dispense (or Dispense Device), and Pickup.

Create or Create Device:	Rx 502573; Mcket	Authoritative Indicates if the Rx is Authoritative if it was from the patient's El- non-authoritative (i.e checkbox will be des	authoritative. s e-Prescribed IR. All other p e. paper rx). By selected for all 2015) Fill: Jay	An Rx is and downloaded rescriptions are default, this new prescription	d ns.
Contains information	Rx: 502573	Extended	EHR	Third Party	Notes
pertaining to the drug or device	Patient: Mckess	son Elvis Bob PHN: 12345678	9 Authorit	ative 🗖 Defer EHR	<u>H</u> elp Desk
prescription, as it was prescribed.	Rx ID: GCN/DIN/PIN:	11733	No Sub: Treatment Type:	Chronic	<b>•</b>
Dispense or	Prev. Rx ID:		Result:		
Dispense Device: Contains	Dispense	Urops _		0 Detected Is	ssue(s): 🖻
pertaining to the fill	DIS ID:	19355925	Fill Type:	FF - First Fill	<b>•</b>
of the drug or device prescription.	DIN/PIN: Pharmacist:	2147602 JS	Sub Reason: Sub Code:		▼ ▼
		,	Result:	Accepted	 1
Pickup: Contains	Pickup			0 Detected Is	ssue(s): 🖻
information pertaining to the pickup of the drug	Workflow Status	: Picked Up	Result:		📃 🛃
or device					ssue(s).



# Filling Prescriptions Using Fill, Queue, and Multi-Fill

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.

To fill or refill a drug or device prescription, do the following:

- 1. Open the incomplete prescription in RX Detail.
- 2. Enter any required information in the main tab of RX Detail.
- 3. Continue to fill the prescription as usual.
- 4. Once done, select the **Fill**, **Queue**, or **Multi-Fill** button. The DIS Record Dispense message will be transmitted to the DIS.



The same PharmaClik Rx workflow exists for both drugs and devices. The *Type* dropdown selection (made in the main tab of a Drug Folder) indicates whether an Activate Dispense or Activate Dispense Device message is transmitted to the DIS. The Dispense (or Dispense Device) section shows the DIS ID of the dispense prescription. The example below displays the EHR tab for a drug dispense.

Rx 502578; Mckes	s <b>▼ Auth</b> : 502578 (Jar	n 29, 2015) <b>Fill</b> : Jan 29	9, 2015 Last Fill:	
Rx: 502578	Extended	EHR	Third Party	Notes
Patient: Mckesso	on Elvis Bob PHN: 1234	156789 🗆 Autho	oritative 🗖 Defer EHR	<u>H</u> elp Desk
Create				
Rx ID:	11737	No Sub:		<b>•</b>
GCN/DIN/PIN:	628115	Treatment Typ	e: Chronic	•
Prev. Rx ID:		Result:		Ð
Orderable Form:	Capsule	•	0 Detected	lssue(s): 🖻
Dispense			Refusal	to Fill
DIS ID:	19356282	Fill Type:	DF - Daily Fill	-
DIN/PIN:	628115	Sub Reason:		•
Pharmacist:	SK	Sub Code:	han	

The Patient's Profile will continue to display a prescription status of Complete.

Mckesson, I	E 3rd Party	Clinical	Profile	History	Consult	Preference	es 🛛 No	tes
Display O	otions							
Display: 🛛	JI		eselect All	🗹 Conc	lense 🗌	Active Only	Patient M	lode
Fill Date	Drug Name	_	Rx#	MER	REM	Status	Active	
Perf On	Strength	Form	Qty	Instru	uctions			_
Jan 29, 201	5 AMOXICILLIN	I:APO-AMO	XI 50257	8 APX	0	Complete		
Jan 29, 201	5 250MG	CAPSULE	Ξ 1	TAKE	1 DAY			
han			~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	Jan 94	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~			~



# Filling Prescriptions to Bill for Professional Services

In certain instances, you may need to fill a prescription in order to bill for a professional service that your pharmacy may have performed (i.e., billing for a medication review; billing for a pharmacist assessment of a minor ailment etc.).

Although it is not necessary, it is highly recommended that you transmit these prescriptions to the patient's EHR Profile on the DIS. This will notify other pharmacies that this professional consultation was already performed and billed for at your pharmacy.

If you **<u>do want</u>** to add the professional service to the patient's EHR Profile, do the following:

- 1. Open the Drug Folder for the DIN/PIN you will use to bill the professional service.
- 2. From the main tab, select **Device** from the DIS Type dropdown list.
- 3. Select the Alternatives tab.
- 4. Enter the **DIN/PIN** you will use to bill the professional service in the *DIS DIN/PIN* field.
- 5. Select **OPINIONS** from the *Type* dropdown list.

home -		~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~
Custom Class	DIS DIN/PIN 93899904 Type: OPINIONS	-
Third Party Plan	Custom Class	Add
		R <u>e</u> move

6. Select the **Save** button.

If you **<u>do not want</u>** to add the professional service to the patient's EHR Profile, do the following:

- 1. Open the Drug Folder for the DIN/PIN you will use to bill the professional service.
- 2. From the main tab, select **Non-DIS** from the *DIS Type* dropdown list.

Corour.	Whit, cap-bichtyx Mixture
Default SIG	DIS Type: Non-DIS 💌 🗌 High Alert
Enterprise:	Route ORAL V
Lenner	Mar 1 Block Haddes and the are a characterized

3. Select the **Save** button.

When you fill a prescription using that DIN/PIN, it will not be transmitted to the DIS.



# Filling Benzodiazepine Prescriptions for Out of Province Prescribers

In Nova Scotia, when prescriptions are dispensed for an *Out of Province* physician that has prescribed benzodiazepine, the DIS requires the use of a preset License Code of **DFMDBEN99**. This code is required for the Prescription Monitoring Program (PMP).

As such a new *NS Type* called **Out of Province – Benzo Prescriber** has been added to the dropdown list. PharmaClik Rx will send the appropriate license code to the DIS on your behalf. The *License* # and the *TP Licen* # fields will contain the prescribers provincial License # used for third party adjudication.

James, Jesse History			Q		Notes
Last Name: James	ReAuth Method:	Phone	-	Doctor #:	2 Nar Res:
First Name: Jesse	Prescriber Type:	Manitoba	Den 👻	License ‡	‡:2224
Mid Name:	Role Type:	Medical [	Doctc 💌	TP Licen	#
Language: English 💌	NS Type:	MB PMP	Prov -	Status:	Active 🗸
		Other Pra	actitioner		A
Address 1 Addre	ess 2	Out Of Pr	rovince - l	Benzo Pre:	scribe
Primary Address: A	ddress 1 💌	Out Of Pr	rovince - I	Der	gienis 🗨
Addr Line 1: 345 Pine Crest Dr	ive Suite 102 Pho	Out Of Pi	rovince - I	Dentet	ext:
		Out Of Pi	rovince - I	Doctor	+ E
Addr Line 2:	Mot	he. juu	2,002	w Trong	grade de ext
· · · · · · · ·	/ \^	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~		,	~ * \/ \

To update your Doctor Folder, do the following:

- 1. Search for and select the Doctor.
- 2. Ensure the **Role Type** is selected from the dropdown list.
- 3. Ensure the NS Type is selected from the dropdown list.
- 4. Ensure the prescriber's billing number is entered under the License # field.

**NOTE:** In some cases MSI may require a prescriber billing number of 9999. If so, enter **9999** in the *TP Licen#* field.

5. Select the **Save** button.



# Placing Prescriptions on Hold

When a paper prescription is transcribed and put on hold for a patient, PharmaClik Rx will transmit the prescription to the patient's EHR. Prescriptions can also be recorded on the patient's EHR directly by physicians via e-Prescribing. This is called "creating the activate" with the DIS. The Prescription is logged for dispensing at a later date.

To place a prescription on hold, do the following:

- 1. Select the **New** button (from the Workbench or the Patient Folder).
- 2. Enter the Patient, Drug, Doctor, QA, Qty, SIG and DS.
- 3. Select the **Process** button.
- 4. Select the **Hold** button.

**NOTE:** 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 2	9, 2015
Rx: 502571	Extended	EHR	Third Party	Notes
Patient: Mckess	on Elvis Bob PHN: 1234567	789 🗖 Authorit	tative 🗆 Defer EHR	<u>H</u> elp Desk
- Create				
Rx ID:	11732	No Sub:		<b>~</b>
GCN/DIN/PIN:	2401495			▼
Prev. Rx ID:	11658	Result:	Accepted	Ð
Orderable Form:	Capsule 🗸	•	0 Detected I	ssue(s): 🖻
Dispense			Refusal t	o Fill
DIS ID:		Fill Type:	FF - First Fill	<b>•</b>
DIN/PIN:	2401495	Sub Reason:		<b>•</b>
Pharmacist:	JS 🔻	Sub Code:		▼
		Result:		Ð
			0 Detected I	ssue(s): 🖻
- Pickup				
Workflow Status:		Result:		Q
EHR			0 Detected I	ssue(s): 🖻

## Pharmaclik RX

# 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.

Prescription Interval Days: 0	Next Fill Qty:	( Days Supply)
MR Code: 11 11 12 12 12 12 12 12 12 12 12 12 12	Special Auth Expiry:	
Written Rx Date: Dec 05, 2014	🖞 Rx Expiry Date:	🔲 ( 🗌 Days)
Eligibility Uverride EAP D	rugs 🔲 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 <u>before</u> 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**

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, 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.

🕂 Rx Detail - Administration	Details : APO-AC	ETAMINOPHEN 325	MG TABLET
Allow Auto-Dispensing No auto	o-dispensing 🔻	Route: ORAL	▼ Disp. Container: None ▼
Instructions: TAKE 1 DAY			
Dosages	c Provious	Ourront Nord	Days Options
Defently SP			Alternate Days:
	January	▼ 2015	Specific Days: 🔲 Monday
Time Qty	J	anuary 2015	Tuesday
Bkf 0	SMT	WTFS	5 Wednesday
Noon 0		1 2 3	3 Thursday
Sup 0	4 5 6	7 9 0 1	Friday
Red h	h	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	Gatering and Gatering and I

- 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.



# Maintaining Prescription Audit History

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 refill this prescription, in order to maintain an accurate Audit History, and remove the refills. PharmaClik Rx will automatically create a new authorization number for the new prescription.



In the patient's EHR Profile on the DIS, these prescriptions will be linked by the *Previous Rx ID*, which will be visible by highlighting the prescription and selecting the **Detail** button.

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 **Profile** tab.
- 3. Highlight the prescription and select the **Refill** button.
  - **NOTE:** If the prescription has expired, a prompt will appear indicating: *"The Rx is older than Rx Life. Do you wish to continue?"* Select the **Yes** button and skip to **Step 6**.
- 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.

Pharma	Clik Rx - Validation Error		
?	Existing refills will be void before creating a new au	due to Piggyback thorization?	rules. Do you want to fill the remaining refills
		Yes	[No]

- 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.



## Updating a Prescription Status

It is important that the status of a patient's prescription is accurate and up to date. Any changes made to the status of the prescription (i.e. Discontinue, Inactivate, or Suspend) will be transmitted to the DIS.

**NOTE:** Only prescriptions with a workflow status of *Picked Up* are permitted to undergo a status change. If you attempt to change the status of a prescription not marked as *Picked Up*, a validation prompt will appear.

#### **Discontinuing a Prescription**

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.

Pharma	aClik Rx - Inactivate Rx
?	What do you wish to do with the prescription?
G	Discontinue Remove repeats - Patient stops medication immediately
c	Inactivate Prescription Retain repeats - inactivates prescription
С	Suspend Prescription and reactivate on Retain repeats - medication temporarily held
	<u>Q</u> K <u>C</u> ancel

- 4. Select the **Discontinue** button.
- 5. Select the **OK** button. The 'Discontinue Prescription' window appears.
- 6. Select a reason from the **Reason** dropdown list.
- 7. Enter other details regarding discontinuing the prescription (optional).
- 8. Select the **Save** button. The Abort message will be transmitted to the DIS that will void the remaining refills.
- 9. Select the **Save** button.



### **Inactivating a Prescription**

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.

Pharma	aClik Rx - Inactivate Rx
?	What do you wish to do with the prescription?
С	Discontinue Remove repeats - Patient stops medication immediately
¢	Inactivate Prescription Retain repeats - inactivates prescription
С	Suspend Prescription and reactivate on Retain repeats - medication temporarily held
	<u>Q</u> K <u>C</u> ancel

- 4. Select the **Inactivate Prescription** button.
- 5. Select the **OK** button. The 'Inactivate Prescription' window appears.
- 6. Select a reason from the **Reason** dropdown list.
- 7. Enter other details regarding discontinuing the prescription (optional).
- 8. Select the **Save** button. The Abort message will be transmitted to the DIS that will void the prescription.
- 9. Select the **Save** button.



#### **Suspending a Prescription**

To suspend 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.

Pharma	aClik Rx - Inactivate Rx
?	What do you wish to do with the prescription?
с	Discontinue Remove repeats - Patient stops medication immediately
С	Inactivate Prescription Retain repeats - inactivates prescription
٦	Suspend Prescription and reactivate on Jan 27, 2015
	<u>O</u> K <u>C</u> ancel

- 4. Select the **Suspend** button.
- 5. Select the **OK** button. The 'Suspend Prescription' window appears.
- 6. Select a reason from the **Reason** dropdown list.
- 7. Enter other details regarding discontinuing the prescription (optional).
- 8. Select the **Save** button. The Abort message will be transmitted to the DIS that will void the prescription.
- 9. Select the **Save** button.

## Pharmaclik RX

# Deferring Prescriptions to the EHR

Users may be required to process a prescription for a waiting patient; however, the product or device may not be recognized by the Provincial DIS yet. The product or device will be added to the DIS eventually, however the PharmaClik Rx user still needs to be able to process the prescription. If this is a device, use the Generic OPINIONS PIN. 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.

McKesson, Elvis Bo	o <b>▼ Auth</b> :0	Fill:	Last Fill:	
Rx: New	Extended	EHR	Third Party	Notes
Patient: McKesso	on Elvis Bob PHN: 1234	456789 🗆 Auth	oritative 📮 Defer EH	R <u>H</u> elp Desk
Create				
Rx ID:		No Sub:		<b>~</b>
GCN/DIN/PIN:	15148	Treatment Typ	e: Chronic	▼
Prev. Rx ID:		Result:		0
Orderable Form:	Capsule	•	0 Detected	d Issue(s): 🖻
Lispon				

4. Continue filling the prescription as usual.

Any future DIS transactions associated with the prescription (i.e. Record Notes, Dispense Pickup, Undo, Reversals, etc.) 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. The Defer Rx will, as outlined above, be indicated with the [Q] indicator. A [Q] indicator will display on the main tab name when the patient has transactions currently in the DIS Queue. This will act as a reminder to the user to deal with the pending prescriptions. For more information, see the DIS Queue Tab section.

monnation, c							
🔯 McKesson, E	3rd Party	Clinical Profi	ile History	Consult	Preferences	0	Notes
Display Options							
Display: All	<b>•</b>	Deselect A	All 🗹 Cond	ense 🦳 ,	Active Only 🛛 🗍	Patier	nt Mode
Fill Date Dru	ug Name	Rxi	# MFR	REM	Status	Active	
Perf On Str	ength Fo	orm Qty	<u>/ Instru</u>	ictions			_
Feb 17, 2015 AM	OBARBITAL S	ODIUM;AM 200	0039 LIL		Queued		
601	MG CA	APSULE 50	AS DI	RECTED		~~~	_



# **Refilling Deferred EHR Prescriptions**

When the **Defer EHR** was turned ON for the previous prescription(s) refills will also need to have the **Defer EHR** checkbox turned ON until the previous record is successfully submitted to the DIS. It is imperative that users are reviewing the DIS Queue on a daily basis.

Therefore when the user attempts to refill a prescription that has 1 or more associated transaction(s) to the current prescription in the *DIS Queue* then the **Defer EHR** checkbox will be ON and cannot be modified by the user.

## **Reauthorizing Deferred Prescriptions**

When the **Defer EHR** was turned ON for the previous prescription(s) ReAuth 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 ReAuth a prescription that has 1 or more associated transaction(s) to the current prescription in the *DIS Queue* then the **Defer EHR** checkbox will be ON and cannot be modified by the user.

Once submitted the ReAuth prescription will be flagged as **Deferred** (Defer EHR = ON). 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.



# 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 or removed from the DIS.

Allows you to make changes to a processed prescription without Amend • impact to billing. Amend LTC Allows you to make changes to non-retail prescriptions (i.e. nursing homes). Allows you to cancel a prescription, correct it, then fill the Rebill prescription in one step using the same prescription number and same fill date (i.e. incorrect quantity authorized). Allows you to cancel the prescription (i.e. prescription filled in Refuse error). Allows you to reverse a prescription without adjudication of the Manual Reversal reversal online. Disabled for eHealth provinces. Wrong Patient

# Amending a Prescription

With DIS integration, pharmacies are unable to amend 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.

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.
- 4. Modify the Dossett/Dispill information.
- 5. Select the **OK** button.



## **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. Depending on the prescription scenario, the following will occur:

Prescription Scenario	Prompt	Options
Prescription is on Hold	PharmaClik Rx - Rebill Prescription Rx# 501879 is not eligible for Rebill. Only Complete or Amend prescriptions are eligible.	A validation prompt appears notifying you only a completed Rx can be rebilled.
Prescription was:	Rebill Prescription	The Dispense of the
On Hold & then     Dispensed	Do you want to rebill this prescription? The prescription is 7 DAYS old.	Rx is reversed locally and on the DIS. Audit History
Inferred	<u>Yes</u> <u>N</u> o	shows a status of Cancelled.
<ul> <li>Inferred &amp; then Dispensed</li> </ul>		

4. Fill the prescription again as per normal process, ensuring to enter the correct billing information.

# **Rebilling a Discontinued Prescription**

If a prescription is Discontinued and located on the Nova Scotia DIS, you cannot make any changes to the billing ( $\mathbf{Rx} > \mathbf{Correct} > \mathbf{Rebill}$ ) as you will get the following Detected Issue:

Error	High	Business Constraint Violation: A local	TRANSACTION NOT ALLOWED DUE TO CURRENT
		business rule relating multiple	STATUS OF PRESCRIPTION: ABORTED
		elements has been violated.	

In order to correct the billing information, you must *Refuse* the discontinued prescription, and create a new prescription with the correct billing information. For details instructions on how to do this, follow the steps outlined below:

- 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 the pharmacy's responsibility to ensure 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.

Correct Rx	×
Amend	Amend the current prescription.
Amend <u>L</u> TC	Make changes to non-retail prescriptions.
Re <u>b</u> ill	Correct billing and keep the Rx#.
<u>R</u> efuse	Cancel the prescription.
<u>M</u> anual Reversal	Perform a manual reversal for the prescription.
Wrong Patient	Prescription was filled for the wrong patient.

- 3. Select the **Refuse** button to correct your Rx. A validation prompt will appear confirming if you would like to refuse the Rx.
- 4. Select the **Yes** button. The 'Refuse Rx' window appears.
- 5. Depending on the prescription scenario, the buttons that will be visible in the 'Refuse Rx' window will vary, as indicated in the following chart:

Scenario Rx		Prompt	Options
	Туре		
New chain	Dispense or Device Rx	Refuse Rx       X         Rx#649073 is on the Patient's EHR Profile.         Emove       Remove locally and Aborted on DIS.         Cancel       Cancel and return to the previous window.	• Remove The dispense for the Rx is Aborted on the DIS. The DIS will remove the Rx from the EHR profile. PharmaClik Rx will remove the local record and will track the removal in the patient history.
			Cancel     Exit with no changes.

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Refill	Dispense or Device Rx	No prompt is displayed.
ReAuth	Dispense or Device Rx	PharmaClik Rx - Refuse Prescription X
		OK Cancel
Rx is on hold and has not been dispensed	Dispense or Device Rx	Refuse Rx     Rx#502804 is on the Patient's EHR Profile.     How do you wish to refuse this prescription?     Remove     Remove from PharmaClik Rx and the DIS. <u>Qancel</u> Cancel and return to the previous window.
First Fill of an Rx that was on Hold	Dispense or Device Rx	Refuse Rx Rx#502813 is on the Patient's EHR Profile. How do you wish to refuse this prescription?   Hold Place on Hold and remain active on the DIS.   Refuse Cancelled and Aborted on the DIS.   Qancel Cancel and return to the previous window.

Rx wasDispenseNo prompt is displayed.placed onor Devicehold, thenRxdispensedwith multiplerefills

- The dispense for the Rx is reversed locally and on the DIS. Refills for the Rx will remain.
- The dispense for the Rx is Aborted on the DIS. The DIS will remove the Rx from the EHR profile. In PharmaClik Rx, the refills are removed, and the Rx is marked with a status of Cancelled.
- Remove Rx is removed locally and from the DIS Profile.
- Cancel Exit with no changes.
- Hold Rx is placed back to Hold and refills for the Rx remain.
- Refuse
   The dispense for the Rx
   is reversed locally and on
   the DIS. In PharmaClik
   Rx, the Rx is marked with
   a \*D\* with a status of
   Hold. Refills for the Rx
   will remain.
- Cancel Exit with no changes.
- The dispense for the Rx is reversed locally and on the DIS. The Rx will have a status of Cancelled. Refills for the Rx will remain.



# Refusing to Fill a Prescription

A health professional should use their professional judgement to determine whether a prescription should not be filled. The **Refusal to Fill** message updates the patient's profile with the 'Refusal' indicator to advise other health professionals that a prescription was presented to your pharmacy and, in your professional judgment, you have decided not to complete the dispense.

This may have occurred in your pharmacy prior to the DIS and you simply contacted the physician or gave the prescription back to the patient. With the connection to the DIS, if you record the Refusal to Fill other health clinicians can see your professional decision.

To complete a Refusal to Fill, do the following:

- 1. Open the incomplete prescription in RX Detail.
- 2. Enter any required information in the main tab of RX Detail.
- 3. Select the EHR tab.
- 4. Select the **Refusal to Fill** checkbox.

	man man		Month and the start and the st
Dispense			Refusal to Fill
DIS ID:		Fill Type:	<b>•</b>
DIN/PIN:	2289296	Sub Reason:	<b>_</b>
Pharmacist:	SK 💌	Sub Code:	•
Reason:		<ul> <li>Result:</li> </ul>	1
Note <sup>.</sup>	Order Stopped		
	Stale-Dated Order		
- Pickup Ala	Incomplete Data		

- 5. Select a Reason from the dropdown list.
- 6. In the Note field, enter any notes regarding the refusal (optional).
- Select the Fill button to submit the Refusal to Fill to the DIS. A claim is not sent for adjudication and the prescription status will display '*Refusal*' in the Profile tab, as well as the History tab.

	McKesson, E	3rd Party	/ Clinical	Profile History	Consult	Preferences	0 Notes
	Entered	User	Event	Activity		Comments	
	Jan 23, 2015 10:4	18 PR	New Rx	Refusal	AMOXICILI	LIN;AMOXICILLI	N: Order St
L	Care		Rx	Inter	᠆᠆᠆᠂᠂ᡧ᠋ᢩ᠘᠐᠕ᡔᢛ		ing and a grant



# **Transferring a Prescription**

### **Transferring In**

The **Download** button is used to transfer in a prescription from a patient's EHR. This will be performed if the prescription has been e-prescribed or if the prescription has been transferred to your specific pharmacy. If the prescription is on the patient's EHR, then this means that the originating pharmacy is connected to the DIS. This pharmacy must assign dispensing authority to your pharmacy before a download can occur. Once this process is complete, your pharmacy can download and dispense against it.

The Download button is available from the following two locations:

- EHR- All (or EHR Rx) > Profile Information
- EHR- All (or EHR Rx) > EHR Rx Details (or EHR Device Rx Details).

To download a prescription, do the following:

- 1. Search for and select the desired patient.
- 2. Select the Profile tab
- 3. Select **Rx** > **Profile** > **EHR All** (or **EHR Rx**).
- 4. Highlight the desired DIS record you wish to download to your pharmacy.

🐈 ehr	- All : MCKESSC	N, ELVIS BOB	PHN 1234	156789				X
Clinic	al Information –							
	bservations (2)							
	Stated Patient's	Height						
	∃-Stated Patient's	Weight						
E E	atient Notes (24	() (1)						
	rofessional Serv	4) ices (6)						
	- Medication Adm	inistration						=
- F	+- Medication Revi	ew						
E	_ ∃- Patient Assessr	nent						
	- Date: Nov 2	6,2014						-
Profil	e Information —			un en la complete en el				
(י _ l	/pe.  All	•	50	urce: Compined	•		ondense	
Loca	al Service Date	Туре	Issues	Product Informa	tion	Qty	REM	•
	DIS ID	Status	Notes			DS	QA	
	Jan 14, 2015	Rx		APO-ACEBUTOLO	DL 100 MG SWAL	LO1 TAB	0	
	11565	completed		DIN:02147602	TAB		1 TAB	
V	Jan 06, 2015	Rx		ACT RANITIDINE	150 MG SWALLO	W.	1	
	11077	active		DIN:02248570	TAB		1 TAB	
<b>V</b>	Jan 06, 2015	Rx	<b>v</b>	APO-METOPROL	DL 50 MG SWALL	0\	1	-
	11076	active		DIN:00618632	TAB		1 TAB	
								-
•		111					•	
D	etail D	o <u>w</u> nload			<u>E</u> H	R- Rx	<u></u> K	

5. Select the **Detail** button. The 'EHR – Rx Details' window opens. The deselected Local checkbox indicates that the prescription is not local.





It is recommended that the Create and Dispense details of a selected prescription are reviewed prior to selecting the **Download** button. This will ensure that the correct prescription has been selected and, for prescription transfers, provide an opportunity to confirm the information from the transferring pharmacy.

💠 EHR - Rx Det	ails: MCKESSON, ELVIS BOB PHN 1234	56789	×
Create Rx Info			
Rx ID:	11565 🗆 Local		
Created:	Jan 14, 2015 Status: completed	ORAL Mfr:	
Prescriber:	Dr. Charlie Chaplin Licence#: 2225	QA: 1 TAB Refills 1 Form: TAB	
		Qty:  I TAB DS:  I d Interval:	
Assigned to:	Blue Pharmacy, ID: 99991	Route: Treatment Type:	
		No Sub:	
		Instructions	
0 R	ecord Note(s) 📄 0 Detected Issue(s) 📄 efusal(s) to Fill 📄	TAKE 1 DAY	
Dispense Info		Condense	э_
ID.	19348272 🗖 Local	DIN/GCN : 2147602	1
Entered on:	Jan 14, 2015 Status: completed	APO-ACEBUTOLOL 100 MG SWALLOW, Str:	
Entered by:	ID: 2231 Name: Doogie Howser	Otv: 1 TAB Befill: 0 Form: TAB	
m m A		DD:	

6. Select the **Download** button. A prompt will display *"Is this an e-Prescribed prescription? If No, Transfer In will be performed."* 

**NOTE:** For device prescriptions, **Download** is only enabled from the 'EHR – Device Rx Details' window.

- 7. Select the **No** button. The 'Transfer In' window will display.
- 8. The values that are returned with the Download message will be populated. Review all fields and add the **Transferring Pharmacist** and any comments that are relevant to the prescription.
  - **NOTE:** If the pharmacy is not in the dropdown list or is missing the Provincial ID, select the **Pharmacy** button to search the Location Registry for a new Other Pharmacy. For more information, refer to the <u>Other Pharmacy</u> section.
- Select the OK button. The download process will find a local match within PharmaClik Rx for both the Physician and Drug. The prescription will open in RX Detail and display the downloaded information.
- 10. Verify all information in RX Detail and select either Fill or Hold.



It is expected that the proper transfer protocol of calling the originating pharmacy occurs and that the prescription <u>must</u> be transferred electronically by the transferring pharmacy before it can be downloaded to your pharmacy.



# **Transferring Out**

The Transfer Out function is used to transfer the ownership of a prescription from your pharmacy to another pharmacy. When a prescription is transferred, the corresponding DIS message will be transmitted to the DIS. The Transfer Out <u>must</u> be completed as soon as possible by the 'Transfer Out Pharmacy'.

To transfer out a prescription, do the following:

- 1. Highlight a specific prescription(s) from either the Workbench, Patient Profile, or Completed tab.
- 2. Select **Rx** > **Transfer**. The Audit History for the first prescription appears. This can be used to provide the other pharmacy with information about the prescription.
- 3. Select the **OK** button. The 'Transfer Out' window appears.

Transfer Out           Receiving Pharmacy           Pharmacy Name:		The EHR checkbox will be checked if the prescription was recorded on the DIS.
Address:	Phone: Fax:	Transfers for DIS prescriptions are not allowed by bypass DIS.
Receiving Phst:	License #:	
If the pharmacy is not in the list, press here to add	it as new: P <u>h</u> armacy	
Comment:		
Transferring Phst: JL 🗨 Transfe	rred By: 📀 Fax 🛛 🔿 Verbal	
	<u>O</u> K <u>C</u> ancel	

4. Select the receiving pharmacy from the **Pharmacy Name** dropdown list.

**NOTE:** If the pharmacy is not in the dropdown list or is missing the Provincial ID, select the **Pharmacy** button to add the pharmacy to the Other Pharmacy list. For more information, refer to the <u>Other Pharmacy</u> section.

- 5. Complete the remaining Transfer Out fields as usual.
- 6. Select the **OK** button. The 'Prescription Transfer Report Send By' window appears.
- 7. Select both the **Fax** and **Print** checkboxes. The Print checkbox is always selected, ensuring the report will be printed.
- 8. Select the **OK** button.
- 9. If the receiving pharmacy's information is not properly entered in List Maintenance, the following Detected Issue appears:



S: NO HIDENTIFIER

Select OK to the Detected Issues window so you are taken back to the Transfer Out window. Correct the details of the receiving pharmacy.

- **NOTE:** Transfers for DIS prescriptions are not allowed to bypass DIS; you cannot deselect the EHR checkbox in the Transfer Out window for these prescriptions.
- 10. The Prescription Transfer Report is sent to the fax and/or prints.

The Processing Transfer message will be displayed and will close upon successful completion of the Transfer message to the DIS. The prescription will be marked as **Transferred**.

#### Transferring a Prescription Out of Province

To transfer a prescription to a non-Nova Scotia (out of province) pharmacy, do the following:

- 1. Complete steps 1 4 of Transferring Out a Prescription.
- 2. Select the **Pharmacy** button in the Transfer Out window. The Other Pharmacy window opens.
- 3. Dropdown the **Prov Code** field and select the appropriate option.



4. In the **Provincial ID** field, enter DF002.



Pharmacy Nam	e		Add
abc pharmacy			
			<u>R</u> emove
			Compare
			Eilter
Addr Line 1:	Phone:		Dial 1 long c ▼ ext
Addr Line 2:	Alt Phone:		7 Digit local 💌 ext
City: Edmonton	Fax:		Dial 1 long c 💌
Province: Alberta 🔽	E-mail:		
Post Code:	Country:	anada	•
Provincial ID: DF002	Prov Code: N	on-NS Pharmacy	Default 🖃
	-		

- 5. Select the **OK** button to return to the Transfer Out window.
- 6. Complete the remaining Transfer Out fields as usual.
- 11. Select the **OK** button. The 'Prescription Transfer Report Send By' window appears.
- 12. Select the **Fax** and/or **Print** checkboxes. The Print checkbox is always selected, ensuring the report will be printed.
- 13. Select the **OK** button. The Prescription Transfer Report is sent to the fax and/or prints.

The Processing Transfer message will be displayed and will close upon successful completion of the Transfer message to the DIS. The prescription will be marked as **Transferred**.

Perf On	Strength	Form	Qty	Instruction	s Status	Active
	HYDROCHLO	ROTHIAZID	E≠0	APX 0	Transferred	
Jun 29, 2023	25MG	TABLET	10	TIT EACH M	IORNING	
					100	



# Other Medications (DUR)

For Drug Utilization Review (DUR) purposes and profile completeness, the DIS requires that non-prescription medications (i.e. over-the-counter, natural health products, prescriber drug samples, etc.) are added to the patient's EHR. In PharmaClik Rx this is accomplished using the **Add DUR** or **Refill DUR** functions currently within PharmaClik Rx.

A DUR is performed when:

- Prescription request is submitted
- Dispense request is submitted
- Prescription is reactivated
- Record "Other Medication" request is made

### Adding an Other Medication (DUR)

To add an Other Medication (DUR), do the following:

- 1. Search for selected the desired patient.
- 2. Select the **Profile** tab.
- 3. Select **Rx** > **Add DUR**. The 'Drug Search' window will display.
- Enter the desired search criteria and select the appropriate Drug. Interaction checking occurs. Either the Interaction Summary appears or a prompt indicates that no interactions exist.
- 5. Depending on which window appears, select the **Accept** or **OK** button. The 'DUR

DUR Instructions : DIN	1 335940 - VITAMIN B12 250MCC	G TABLET	×
DUR#: User: PR ▼ Route: ORAL	Start Date: Feb 13, 20 End Date: Feb 27, 20 Prescribed or OTC? OTC	15 II 15 II	Qty: 30 DS: 30 F EHR
SIG T 1 TAB DY			
Translated Instruction	S		
Notes	Alert Print Private EH	IR User	Date

Instructions' window will display.

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- 6. By default, the EHR checkbox will be selected. If you do not want the DUR transmitted to the DIS, deselect the EHR checkbox.
- 7. Enter in additional details regarding the DUR, such as *Route*, *Start Date*, *End Date*, *Prescribed or OTC*, *Qty*, and *DS* (mandatory).
- 8. Select the **OK** button. The patient's Profile will be displayed once the DUR has been transmitted to the DIS.

	Mckesson, E	3rd Party	Clinical	Profile	History	Consult	Preferenc	es 🛛	Notes
You can modify what	Display Opt	ions Conly		eselect All	Cond	ense 🔲 .	Active Only	Patier	nt Mode
prescriptions are displayed from	Fill Date Perf On	Drug Name Strength	Form	Rx# Qtv	MFR	REM	Status	Active	
this dropdown menu.	Feb 13, 2015	CYANOCOBA 250MCG	LAMIN;VIT TABLET	AMI1267DU 30	JR JAM TAKE	1 TABLET I	DUR DAILY	<b>&gt;</b>	
		ARET VINAN	when when all						~~~



During batch processing, mandatory display of the patient's EHR may be ignored. All messages returned by the DIS will be retained within PharmaClik Rx and the pharmacist can review the Detected Issues in a stand-alone patient profile transaction.

When adding a DUR:

- Enter the **Quantity** and **Day Supply**. These values, however, are not transmitted to the DIS. It is recommended that the user include the Quantity of the medication in the SIG field of any Other Medication. (i.e. **QTY: 60 DS: 30 TAKE 1 TAB BID**).
- Other Medication can be edited, which will transmit an update to the Other Medication message (i.e. end date needs to be changed).
- All existing DURs entered prior to Version 6.3 are only stored locally on PharmaClik Rx. To transmit Other Medication information that already exists on PharmaClik Rx to the DIS, create a new DUR, or use the **Refill DUR** button and refill the existing DUR.
- Route of Administration is required. PharmaClik Rx will populate the Route field based on the Route information within the Drug or Mixture Folder.
- If a Detected Issue appears and an Issue Management is added, users are able to view the details of this management, including the date it was managed and who it was managed by, by selecting the Detected Issues folder in the patient's EHR Other Medication Details window. For more information on the patient's EHR Other Medication Profile, see <u>Sample</u> <u>EHR - Other Medication Details Window</u> section.



# Updating a Non-Local Other Medication (DUR)

If a DUR exists on a patient's EHR on the DIS, any pharmacy connected to the DIS has the ability to update or modify the DUR.

To update a non-local Other Medication that exists on the patient's EHR Profile, do the following:

- 1. Search for and select the desired patient.
- 2. Select the Profile tab.
- 3. Select **Rx** > **Profile** > **EHR All** or **EHR Rx**.
- 4. Highlight the non-local Other Medication that exists on the patient's EHR Profile and select the **Detail** button.

Profile Type	میں		Source: Combined   Combined   Condense	1
Local	Service Date DIS ID	Type Status	Issues Product Information Qty REM ^ Notes DS QA	
	Feb 10, 2015 50205387	Other Med active	ASA 81 MG SWALLOW, ORAL E DIN:02244993	
	Feb 07, 2015 50205416	Other Med active	ASPIRIN 81 MG SWALLOW, ORAL	
	Jan 17, 2015 50195174	Other Med active	ACT SERTRALINE 100 MG SWALLOV     DIN:02287412	
•			× 	5. Select
Deta	ail		<u>E</u> HR-Rx <u>O</u> K	the Download

- 6. Exit the patient's EHR Profile. The Other Medication will be visible in the Profile tab of the Patient Folder.
- 7. Update the Other Medication as required and select the **OK** button. The update will be transmitted to the Nova Scotia DIS.



# **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 any non-retail prescriptions.



During batch processing, mandatory display of the patient's EHR may be ignored. All messages returned by the DIS will be retained within PharmaClik Rx and the pharmacist can review the Detected Issues in a stand-alone patient profile transaction.

The Pickup Message for Dosset, Dispill and non-retail groups will be transmitted automatically without user intervention (or POS integration). Batch functionality will continue to perform all current PharmaClik Rx functionalities, including the following enhancements:

EHR display is not required for batch prescriptions.	EHR Preferences from Pharmacy Preferences will not be applicable for batched prescriptions.
Detected Issues can be viewed from a completed batch profile.	All Detected Issues will be saved within PharmaClik Rx, allowing the user to go back to the Batch ID at any time to view the issues.
	Users with real time prescriptions will only be able to manage <i>Error</i> Detected Issues. All <i>Warning</i> and <i>Information</i> Detected Issues will be for information purposes only. Please review this information and use your professional judgment to correct them. A rebill or cancellation may be required.
A Rejected, Pending, or Failed transaction will be treated in the same manner on the Batch Profile window as how a rejected	The claim will be displayed in the batch profile window as <i>Incomplete</i> or <i>Pending</i> if the transaction is not successful.
CPhA transaction is handled in current functionality.	The user will need to Detail the transaction, correct the prescription, and then select the <b>Fill</b> button to transmit the claim.
	Selecting the <b>Submit</b> button is not desired. It would be best to open the prescription in RX Detail and view the EHR Tab of the prescription in order to determine what evaluation is required.



## Non-Synchronized Patients

As indicated in the <u>Synchronization</u> 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.

Batch Pro Batch ID 52 Group: Sis	file Create D sters of St. Martha	ate: Jan 20, 2	2015	Schedule	ed Date: 01/ Time: 14:	20/2015			<u>0</u> K
Patient Nam Rx# LF Date	e Drug Name Strength	Form	Gro Qty Mfr	up Rx Sta QA Instructio	tus Rep ons	Status Active	Prescription Information	ſ	Condense
Incomplete									R <u>e</u> quest
Paradis, Fred 0 Nov 20, 2014	dy AMOXICILLIN;A 250MG	MOXICILLIN CAPSULE	A-A 1 SIV	Active Regu 0 AS DIRE0	ular Dose 0 CTED	<ul> <li>Incomplete</li> </ul>	Incomplete Not Sync		<u>P</u> reference
Constructe		-	~~~~·		^		·		

- 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 <u>Existing</u> <u>PharmaClik Rx Patient/New CR Patient</u>.
  - If your patient is an existing CR patient, follow the instructions outlined in <u>Existing</u> <u>PharmaClik Rx Patient/Existing CR Patient</u>.
- 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.

# \* Pharmaclik

# **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.

Batch Pro Batch ID 48 Group: Si:	file Create Da	ate: Jan 19, 2	015 Schedul	ed Date: 01/19 Time: 17:34	/2015		
Patient Nam Rx# LF Date	e Drug Name Strength	Form	Group Rx Sta Qty QA Mfr Instructi	tus Rep ons	Status Active	Prescription Information	Condense
Last Rx#	Doctor		Administratio	n Times			R <u>e</u> quest
Amaran, Para	ames		A - Active Regu	ılar Dose 🔻	Complete	2 1 Detected Issue(s)	<u>P</u> reference
502510	MEDROXYPRO 100MG Dr EASTWOOD	GESTERONE TABLET CLINT	, 120 1200 APX AS DIRE	9 CTED	7		
		Blister 🗆 A	uto Dispensing			Lumming a second	

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



- 4. Review the Detected Issues.
  - If the prescription status in the 'Batch Profile' window is *Incomplete, Rejected*, or *Failed*, either correct the error or add an Issue Management. Once done, select the **Submit** button to resubmit the Rx for processing.
  - If the prescription status is the 'Batch Profile' window is *Complete*, then the prescription has been successfully processed. The Detected Issues did not stop the prescription from processing based on your preferences set for displaying Detected Issues. For more information on how to set these preferences, see <u>Detected Issue Thresholds</u> section.

### Pharmaclik RX

# **Batch Exclusion List**

During Batch Evaluation, prescriptions are evaluated if they should be included within the batch. Prescriptions will be excluded from the batch if any of the following are true:

- The DIS Type (i.e. Device, Non-DIS, or Rx) has changed since the last fill.
- The prescription was previously filled as a stock supply and the patient is no longer flagged as a facility patient.
- The prescription was previously filled as a prescription for a synchronized patient (a DIS ID exists), and the patient is now flagged as a facility patient.

This will not halt the Batch, but these prescriptions will be removed from the batch and will require manual processing. When prescriptions are excluded, a prompt will display so that you can print a list of the excluded prescriptions. Select the **Yes** button to print the Batch Exclusion List. You can cancel the batch, correct the error and rebatch, or you can complete the batch for all successful prescriptions and then complete the excluded prescriptions manually.

	Batch Exclusion List						
McKesson Canada Pha	armacy		Date: May 22, 2014				
131 McNabb Street			Group Name:				
Halifax, Nova Scotia B1B1B2 Batch ID:							
		Scheduled	d Date: May 23, 2014				
Patient Name	Rx #	Product Information	Qty				
Smith, Jane	5023458	VITAMIN C, CAP 500MG	20				
Sullivan, Mary Joe	5014458	APO-LOXAPINE 25MG	30				
	F	Page 1 of 1					



# Detected Issues and Issue Management

If the DIS detects an issue with a transaction, whether it is an inquiry or the receipt of information, it may return a detected issue to alert the user to a potential error, discrepancy, or matter that may be of concern.

### 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 and manage 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 Nova Scotia.

When a 'Detected Issues' window appears:

- <u>Without</u> an *Issue Management* section, then the detected issue(s) are only displayed for information purposes. Usually this is a result of an EHR Query.
- <u>With</u> the *Issue Management* section greyed out, then the detected issue cannot be managed and must be resolved and then the claim can be resubmitted to the DIS.
- <u>With</u> the *Issue Management* section, then the detected issue can be managed by adding an issue management and resubmitted to the DIS.

Priority	Severity	Issue Type	Description				
Varning I	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)				
∀arning I	Low	Drug Interaction Alert: Proposed therapy may interact with an existing or recent drug therapy.	A drug to drug interaction was found between SLT HMG-COA REDUCTASE INHIBITORS/SELECTED ANTICOAGULANTS. INCREASED EFFECT OF THE LATTER DRUG. Moderate Interaction: Assess the risk to the patient and take action as needed. Clinical Effects Code: INL Reference Code: MCR (400050)				
ssue Ma	anageme	nt					
Code		(	Comment Add				
			Remove				



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	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 wrong Provider ID, or wrong DIN.	
Warning or Information	Rejected	The request could not be processed successfully and has been rejected, but it can be managed. The message requires immediate action to continue. You must add an issue management and claim must be resubmitted. Some examples include <i>Interaction</i> , or <i>Age Precaution</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> .	

To view the details of a Detected Issue, doubleclick 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. It will also display any previous Issue Management that was recorded, as well as the date and the user who managed the issue.

DIS Event DIS ID Dispense Location	Status	Quantity	Start Date End Date	Event Details	
Prescription 1083	DRUG		Jan 02,2015 Jan 03,2015	DIN:02231702 PMS-BROMOCF ORAL	RIPTINE 2.5 MG SWALLOW,
<	nent				
< Previous Manager Code	nent		III Comment	Date	Managed By
tervious Managen Code Therapy Appropriate	nent	C ue Manageme	III Comment nt Test Prescription	Date Jan 02,2015	Managed By ID: 2224 Name: Jesse Jame
	nent Iss Th	C ue Manageme erapy appropris	TT Comment nt Test Prescription ate for patient	<b>Date</b> Jan 02,2015 Jan 02,2015	Managed By ID: 2224 Name: Jesse Jame ID: 2224 Name: Jesse Jame

### Pharmaclik RX

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.

Rx: 501168	Extended	EHR	Third Party	Notes
Patient: McKess	on Elvis Bob PHN: 1234	Defer EHR	<u>H</u> elp Desk	
Create				
Rx ID:	10243	No Sub:		-
GCN/DIN/PIN:	2147602	Treatment Type:		-
Prev. Rx ID:		Result:		5
Orderable Form:	Drops	•	2 Detected	Issue(s): 🖻

3. If a Detected Issue existed, select the Folder <sup>I</sup> icon. The 'Detected Issues' window will appear, displaying the Detected Issue(s).



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

# Managing Detected Issues

Pharmacy staff will be alerted of any Detected Issues that may arise from activating and dispensing prescriptions. 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.

In other instances you may not be able to correct a detected issue by adding an *Issue Management*; instead, you would have to resolve the error and resubmit the prescription (i.e. submitting a duplicate therapy). 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.



If a Detected Issue is returned and it cannot be managed, the user will not be able to add an issue management. For example, all Device transactions returned with a Detected Issue cannot be managed so the Issue Management section will be greyed out.



To manage a Detected Issue from the 'Detected Issues' window, do the following:

- 1. Double-click on the Detected Issue description to view details of the issue (optional). The 'Detected Issue Events' window will appear.
- 2. Once you have reviewed the details of the Detected Issue, select the **OK** button to return to the 'Detected Issues' window.
- 3. Do one of the following:
  - If the issue <u>cannot be managed</u>, select the **Cancel** button and return to Rx Detail. Correct the issue, as deemed necessary, and resubmit the transaction.
  - If the issue <u>does not require management</u>, select the **OK** button. PharmaClik Rx will continue processing the transaction.
  - If the issue <u>requires management</u> then, select the **Add** button from the Issue Management section. A new row will be added.
    - **NOTE:** The **Add** and **Remove** buttons will be disabled when the Severity of the Detected Issue is *Information* or *Warning*.
      - a. Use your professional judgment to select an appropriate Issue Management from the **Code** dropdown list (mandatory).
      - b. To document additional comments about the issue management, enter text into the **Comment** field (optional).
      - c. Select the **OK** button to retransmit the DIS message with the Issue Management.

Warning High Condition Alert: Proposed therapy may be inappropriate or contraindicated due to an existing/recent patient condition or diagnosis.	UE TO
ssue Management	
ssue Management	
Theranu Annoniste	Add
The state of the s	844
Provided Patient Education	
Added Concurrent Therapy	Bemove
Temporarily Suspended Concurrent Therapy	<u>R</u> emove



### **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.

#### Drug is Known to Interact With Another Active Drug

This Detected Issue will appear as a warning when the drug being dispensed may interact with another drug that the patient is actively taking.

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

**How to Resolve:** This issue can be managed through an issue management. 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. If determined that the drug will be okay for the patient, add an issue management and resubmit the transaction to the DIS. For more information, see the <u>Managing Detected Issues</u> section.

#### **Drug Not Recommended for Use**

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).

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

**How to Resolve:** This issue can be managed through an issue management. To resolve this issue, the pharmacist can review the prescription, and, if determined that the drug should still be dispensed, add an issue management and resubmit the transaction to the DIS. For more information, see the <u>Managing Detected Issues</u> section.

#### Low Dose Alert

This Detected Issue will appear when your pharmacy transmits a prescription with a dose that is below the suggested therapeutic level dose.

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)

**How to Resolve:** 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. If it is determined the prescription should be filled, then you must add an issue



management and retransmit the claim to the DIS. For more information on how to do this, see the <u>Managing Detected Issues</u> section.

#### **DIN/NPN Does Not Exist**

This Detected Issue will appear when the DIN/PIN that is submitted in the claim in 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.

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

**How to Resolve:** 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 <u>DIS DIN/PIN and Type</u> <u>Field</u> section.

#### **Prescriber Not Authorized to Prescribe**

This Detected Issue will appear when the prescriber (Doctor Folder) that is selected is not authorized to prescribe drugs. As noted in the Detected Issues window below, this is a violation of a business constraint and cannot be managed through an issue management.

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

**How to Resolve:** 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 <u>Doctor Status</u> section.

#### **Prescriber Not Authorized to Prescribe Monitored Drugs**

This Detected Issue will appear when the prescriber (Doctor Folder) that is selected is not authorized to prescribe monitored drugs including benzodiazepines (i.e. codeine).

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

**How to Resolve:** As noted in the Detected Issues window below, this is a violation of a business constraint and cannot be managed through an issue management. This may be a result of you selecting the incorrect prescriber. 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.

**NOTE**: Out of province doctors must be registered with NS PMP.


#### **Interaction of Drug with Allergy**

This Detected Issue will occur when an allergy that is added on a patient's EHR may potentially interact with the drug being dispensed. If the drug was previously dispensed, the user can double-click the detected issue to open the 'Detected Issue Events' window and view when and what was dispensed previously.

Priority	Severity	Issue Type	Description
Warning	Medium	Allergy Alert: Proposed therapy may be inappropriate or contraindicated because of a recorded patient allergy to the proposed product. (Allergies are immune based reactions.).	INTERACTION OF DRUG WITH ALLERGY

**How to Resolve:** This issue can be managed through an issue management. To resolve this issue, the pharmacist can review the prescription, and, if determined that the drug should still be dispensed, add an issue management and resubmit the transaction to the DIS. For more information, see the <u>Managing Detected Issues</u> section.

#### Patient Profile is Masked

This Detected Issue will appear when the patient has their profile masked. As noted in the Detected Issues window below, this is a violation of a business constraint and cannot be managed through an issue management.

Priority	Severity	Issue Type	Description
Error		Business Constraint Violation: A local business rule relating multiple elements has been violated.	AN ERROR OCCURRED - ERROR DETAILS: PATIENT PROFILE IS MASKED

**How to Resolve:** To resolve this issue, the pharmacist must obtain consent from the masked patient to access their profile or override consent for emergency reasons. For more information, see the <u>Entering/Overriding Patient Consent</u> section.

#### **Device Prescription Order Must BE OPINIONS PIN**

This Detected Issue will appear when your pharmacy transmits a device prescription to the DIS without the Type being selected as OPINIONS. In Nova Scotia, all device transactions must be transmitted to the DIS with a Type of OPINIONS.

Priority	Severity	Issue Type	Description	
Error	High	Business Constraint Violation: A local business rule relating multiple elements has been violated.	DEVICE PRESCRIPTION ORDER MUST BE OPINIONS PIN	

**How to Resolve:** To resolve this issue, the pharmacist must open the Drug Folder for the Device and in the Alternatives tab select OPINIONS from the Type field. For more information on how to do this, see the <u>Setting Up a Drug as a Device</u> section.



#### **Pediatric Age Precaution Indicated**

This Detected Issue will appear as a warning when the drug being dispensed may be inappropriate to prescribe to a child.

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

**How to Resolve:** This issue can be managed through an issue management. To resolve this issue, the pharmacist must review the prescription and, if determined that the drug will be okay for the patient, add an issue management and resubmit the transaction to the DIS. For more information, see the <u>Managing Detected Issues</u> section.

#### **Pregnancy Precaution**

This Detected Issue will appear when your pharmacy transmits a prescription for a patient who is pregnant (which would be indicated in the Clinical tab of the Patient Folder, under the Clinical Information section).

Priority	Severity	Issue Type	Description
Warning	Low	Pregnancy Alert: Proposed therapy may be inappropriate or contraindicated during pregnancy.	PREGNANCY PRECAUTION - DRUG KNOWLEDGE BASE COMMENTS: (ESCITALOPRAM) RISK OF PERSISTENT PULM HTN AFTER 20 WKS; NEONATE BEHAVIOR SYNDR 3RD TRIMESTER

**How to Resolve:** The pharmacist must evaluate the prescription and determine whether it is still deemed appropriate to fill. If it is determined the prescription should be filled, then you must add an issue management and retransmit the claim to the DIS. For more information on how to do this, see the <u>Managing Detected Issues</u> section.

#### No Patient Found With Identifier Provided

This Detected Issue will appear when your pharmacy has synchronized your patient with a patient file on the Client Registry 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 Client Registry, then the patient would have 2 profiles on the Client Registry. As a result, the Nova Scotia 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 you will get this Detected Issue.

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.	



**How to Resolve:** To resolve this issue, the pharmacist must synchronize the patient again. For more information on how to synchronize the patient, see the <u>Searching for and Synchronizing a</u> <u>Patient</u> section.

#### Location Not Authorized to Transfer Prescription

This Detected Issue will appear when your pharmacy attempts to download (transfer in) a prescription from the DIS when it is another pharmacy that the prescription is being transferred to. When a prescription is being transferred out, the pharmacy that the prescription is being transferred out to must be selected. If another pharmacy tries to download the prescription, then this Detected Issue will appear.

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

**How to Resolve:** To resolve this issue, you must contact the pharmacy transferring out the prescription in order to get the target pharmacy modified to your pharmacy.

#### Time Limit for Retract Has Expired

This Detected Issue will appear when your pharmacy attempts to retract a pickup that is older than 90 days.

Priority	Severity	Issue Type	Description
Error		Business Constraint Violation: A local business rule relating multiple	TIME LIMIT FOR RETRACT HAS EXPIRED
		elements has been violated.	

**How to Resolve:** To resolve this issue, you must manually reverse the pickup by highlighting the Rx (either from the Workbench Completed tab, or the Patient Profile) and selecting **Rx**> **Correct > Manual**. The reversal of the pickup will be completed locally. The reversal of the dispense will now be processed as per normal process.



# Modifying Workflow Status

A prescription's workflow status can be modified to *Waiting for Delivery*, *Picked Up*, or *Waiting for Pickup* either manually or via POS integration. Most pharmacies will have their settings set to Dispense, which will mark the prescription as *Picked Up* once an Rx is completed, however users can select *Manual* as well. For more information on setting these preferences, see <u>DIS</u> <u>Preferences</u>.

## Changing the Pickup Status Manually

To manually modify a prescription workflow status to *Picked Up* from the Workbench, do the following:

- 1. Select the **Completed** tab.
- 2. Highlight the prescription(s) to be changed, and then use the mouse to **right-click** on the color coded box next to the Rx.

Entered Activity	Rx Number	Ø	Patient	Doctor	DIN	Trade Name
Jan 14 17:58New	502550		McKesson, Elvis	KCHAPLIN, CHA	2238670	C-2 BUFFERED

- 3. Select one of the following options from the pop-up menu:
  - Change to 'Waiting for Delivery'
  - Change to 'Picked Up'
  - Change to 'Waiting for Pickup'
- 4. The 'Change Workflow Status' window appears. Select the **OK** button to submit the status change message to the DIS. The cursor will return to the Workbench once it is transmitted to the DIS.

Change Workflow Status							
he fo	blowing prescri	iptions will be changed to	Picked Up				
)esele	ect prescriptior	ns that should not be chang	ged				
	Rx Number	Patient	Trade Name	Workflow Status			
$\checkmark$	502550	Mckesson, Elvis Bob	C-2 BUFFERED WITH COD				
otal	# Rx :	1 # Rx to Chang	e: <u>1</u>	<u>C</u> ancel			



## Changing the Pickup Status through POS Integration

When the Dispense Pickup is set to POS Integration, the pickup message will be sent upon scanning at the cash register. Any prescription not scanned will remain in the Completed Tab of the workbench and the DIS status will still remain **Pending** on the DIS until the prescription is marked as **Picked Up**.

When a DIS Pickup message has failed, the prescription will remain on the Completed Tab. It will be necessary to review the prescription and attempt to resolve the reason for the failed pickup in order to remove the prescription from the Completed tab.

	Prescriptions Activities			6	Messages		DIS Queue (7)	
	New				<u>R</u> efill		<u>D</u> etail	
	To Do (1)	Ir	n Process (52)		Pending (204)		Complete	d (35)
	Entered	Activity	Rx Number	Ø	Patient		Doctor	<u>^</u>
	Feb 05 16:49	New	502710		McKesson, Elvis Bob	JAMES,	JESSE	
	Feb 02 14:17	New	502610		Katherine, Eight	CHAPLI	N, CHARLIE	=
	Feb 05 16:58	New	502712		McKesson, Ginger	EASTW	DOD, CLINT	
	Feb 05 16:33	New	502705		McKesson, Elvis Cardbo	eCHAPLI	N, CHARLIE	
~	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~		-	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	mugh		Manual Comments

#### Pharmaclik RX

### **Resending a Failed Pickup Status**

To review, resend, and resolve Failed Pickup prescriptions, do the following:

- 1. Highlight the prescription.
- 2. Select **Rx > Detail**.
- 3. Select the EHR tab.
- 4. From the *Pickup* section, review the Detected Issues or Failure messages.

when had men	Result:	Accepted F
		1 Detected Issue(s): 🗲
Pickup		
Workflow Status: Pickup Failed	Result:	Rejected
IT EHR		2 Detected Issue(s): 🗲

- 5. Select the EHR checkbox in the *Pickup* section. PharmaClik Rx will attempt to send the pickup message again. One of the following will occur:
  - If the Pickup message is <u>successfully</u> transmitted, the Workflow Status will be updated to *Picked Up*.
  - If the Pickup message is <u>not successfully</u> transmitted, PharmaClik Rx will prompt to determine if the status should be updated locally. Selecting **Yes** will only update the local status to *Picked Up*, not the DIS.







Activities can be created for scheduled prescription status changes (i.e. prescriptions with scheduled reactivation dates or scheduled stop dates) and these will be automatically transmitted to the DIS on the effective date.

If during transmission a Detected Issue was encountered, the Activities > To Do tab will list these with an Activity type of 'Issue Management'. The Comments will indicate the Patient's Name, Rx#, Trade Name, Strength, and Form.

#### **Enabling Issue Management Activity Feature**

It will be necessary to enable the Issue Management feature to add Issue Management activities to the Activities tab of the Workbench.

To enable the Issue Management feature, do the following:

- 1. Select **More > List Maint**. The 'List Maintenance' window appears.
- 2. From the dropdown list at the top of the window, select **Calendar Activity**. The contents of the list will be displayed.
- 3. Select the **Custom** checkbox for the Calendar Activity Issue Management.

💠 List Ma	aintenance		<b>×</b>
Calendar	▼		
List Item	S		
Code	Calendar Activity	Custom	▲ <u>A</u> dd
IMT	Issue Management	V	
	A second second second		man and a second

4. Select the **OK** button.

#### Correcting an Issue Management Activity

Corrective action must be taken for these Issue Management activities as it may prevent a prescription from subsequently being filled successfully.

To manage this type of issue from the workbench, do the following:

- 1. Select the **To Do** tab on the Activities tab.
- 2. Highlight any row with an Issue Management Activity.
- 3. Select the **Process** button. A 'Detected Issues' window opens displaying what has stopped the message.
- 4. Depending on Priority and Severity of the issue, the user will need to make the appropriate changes to the prescription on the patient's profile.
- 5. Select the **OK** button. The prescription will move to the Completed tab.



## 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 (i.e. prescription, pickup, or clinical requests) that were unable to be processed due to the DIS Network unavailability.

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 A		Ac	tivities	Mess	ages DI	S Queue (10)
Status	Creati	on Date	Patient			# Tx
Failed	Dec 19	9, 2014 10:4	9 tester, sever	I		5
Rejected	Jan 23	, 2015 10:38	3 Strezov, Jen	nifer		3
Deferred	Feb 05	, 2015 16:5	) McKesson, B	Elvis Bob		2
Patient McKesso	ın, Elvis	Bob		PHN:	123456789	
Status	Creatio	n Date	Rx Number	Transaction	Description	Transaction N
Deferred	Feb 05,	2015 16:50	502710	Record disper	se processing reques	t Dispense Presci
Deferred	Feb 05,	2015 16:50	502710	Record disper	ise pickup request	Dispense Pickur
		·····			- American	

PharmaClik Rx will continually monitor the DIS Availability and process any DIS Queue 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. 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.

Prescriptions Activities			ctivities	Messages D	IS Queue (7)	
Status	Creati	on Date	Patient		# Tx	( Deserved
Queued	Dec 19	9, 2014 10:5	2 tester, sever	n	2	
Rejected	Jan 23	, 2015 10:3	8 Strezov, Jer	nnifer	3	RX Detail
Deferred	Feb 05	5, 2015 16:5	0 McKesson,	Elvis Bob	2	
						Patient
						Drug
Patient Strezo	v, Jennifei		n Decementaria	PHN: 775415615		Doctor
Status	Creatio	on Date	Rx Number	Transaction Description	Transaction N	
🔁 Rejected	Jan 23,	2015 10:38	502533	Record dispense processing reque	st Dispense Presc	
Queued	Jan 28,	2015 13:19	502533	Record dispense pickup request	Dispense Pickup	_og Off
Queued	Jan 29,	2015 07:46	502533	Suspend prescription request	Suspend Prescr	C. La Provincia
4		III			4	More
			Sort	Filter Send All Se Failed Der	nd All Refresh	Exit

- **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.
# Tv-	The total number of transactions which are currently in the DIS Queue for
# 1X.	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.

Prescription	IS	Ac	tivities	Messages	DIS Queue	(7)	$\sum$	Vorkbench
Status	Creat	ion Date	Patient		# Tx			
Queued	Dec 19	9, 2014 10:5	2 tester, sever	า		2		
Rejected	Jan 23	3, 2015 10:3	8 Strezov, Jer	nifer		3		RX Detail
Deferred	Feb 05	5, 2015 16:5	0 McKesson, I	Elvis Bob		2		
							K	Patient
							K	Drug
Patient Strezov.	, Jennife	r		PHN: 775415615				Doctor
Status	Creatio	on Date	Rx Number	Transaction Description	Transac	tion N		23.243
🔁 Rejected	Jan 23,	2015 10:38	502533	Record dispense processing	request Dispense	e Presc		
Queued	Jan 28,	2015 13:19	502533	Record dispense pickup req	uest Dispense	e Pickup		_og Off
Queued	Jan 29,	2015 07:46	502533	Suspend prescription reques	st Suspend	l Prescr		
•		111					K	More
Aba	andon	Amend	j	Send Failed	Send Deferred	Refresh		Exit

Issues/Errors:	A yellow folder rightary 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:	<ul> <li>Displays the transmission status of the DIS Queued transaction. The status will be one of the following:</li> <li>Queued – Message is waiting to be sent.</li> </ul>							
	<ul> <li>Started – Message is currently being sent.</li> <li>Rejected – Message is rejected by the DIS with Detected Issues. User must attempt to manage the Issue(s).</li> <li>Failed – Message transmitted unsuccessfully after a predefined number of attempts.</li> </ul>							
	<ul> <li>Deferred – Message is waiting to be sent as per the request of the user.</li> </ul>							
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 DIS Queued 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							
Submit	<ul> <li>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.</li> <li>Selecting this button will change the status of the highlighted DIS Queued transaction to Queued.</li> </ul>						
Sort	<ul> <li>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>.</li> <li>Sorting items by the option <i>Icon</i> is not possible. This option will be removed in a future enhancement.</li> </ul>						
Filter	<ul> <li>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).</li> </ul>						
Send All Failed	• Transmits all transactions with a status of <b>Failed</b> .						
Send All Deferred	• Transmits all transactions with a status of <b>Deferred</b> .						
Detailed Transact	Detailed Transaction						
Send Failed	• Transmits the highlighted transaction with a status of <b>Failed</b> .						



Send Deferred	• Transmits the highlighted transaction with a status of <b>Deferred</b> .
Amend	<ul> <li>Allows a user to modify an issue with a prescription and resubmit the claim to the DIS (i.e. invalid provider or DIN#).</li> </ul>
Abandon	<ul> <li>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.</li> </ul>

## 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 retransmitting.
- **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 Activi			ivities	Mes	sages	DIS Queue (7)			
Status	Creati	on Date	Patient			# Tx			
Queued	Dec 19	, 2014 10:52	tester, sever	1					
Rejected	Jan 23,	2015 10:38	Strezov, Jen	nifer		3			
Deferred	Feb 05	, 2015 16:50	McKesson, E	Elvis Bob		2			
Patient Strezov,									
Status	Creatio	n Date I	Rx Number	Transaction	Description	Transaction N			
	Jan 23.	2015 10:38 B	502533	Record disper	nse processina reau	jest Dispense Presc			
Queued	Jan 28,	2015 13:19 5	502533	Record disper	nse pickup request	Dispense Picku;			
Queued Jan 29, 2015 07:46 502533 Suspend prescripti				cription request	Suspend Prescr				
•									

#### **特 Pharmaclik** RX

## 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	Detecte	d Issues -	Dispense Prescription: Mckesson,	Elvis Bob PHN 123456789	×
	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	
	EHR Co	nsen <u>t</u>		<u></u> K	

- 4. Resolve the error or enter an Issue Management. For more information on entering an Issue Management, see <u>Detected Issues and Issue Management</u>.
  - **NOTE:** In the example above, the DIN/PIN is invalid. As noted in the Detected Issues window above, this is a violation of a business constraint and cannot be managed. 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 # or DIN #).

This will avoid the user having to find the Rx 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.

Prescriptions	6	Ac	tivities	Messages	DIS Q	ueue (7)	10	Workbench
Status	Creatio	on Date	Patient			# Tx		
Queued	Dec 19,	, 2014 10:5:	2 tester, sevei	า		2		DV Dut-1
Rejected	Jan 23,	2015 10:38	3 Strezov, Jer	nnifer		3		RX Detail
Deferred	Feb 05,	, 2015 16:5(	0 McKesson,	Elvis Bob		2		
								Patient
								Drug
Patient Strezov,	Jennifer			PHN: 775415615				Doctor
Status	Creatio	n Date	Rx Number	Transaction Description	Tra	Insaction N		1275 2010
🔁 Rejected	Jan 23, 2	2015 10:38	502533	Record dispense processing re	equest Dis	pense Presc		
Queued	Jan 28, 2	2015 13:19	502533	Record dispense pickup reque	est Dis	pense Pickur		_og Off
Queued	Jan 29, 2	2015 07:46	502533	Suspend prescription request	Su	spend Prescr		
		111				•		More
Abar	ndon	Amend		Send Failed	Send Deferred	Refresh	J	Exit



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 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 <u>pharmacy's responsibility</u> to go back to the patient's profile to reverse any financial adjudication and correct the Rx. Pharmacies in Nova Scotia, by law, must ensure the patient's EHR is accurate and up to date.

Prescription	Prescriptions Activi		tivities	Messages	DIS	Queue (7)		Workbench
Status	Creati	on Date	Patient			# Tx		
Queued	Dec 19	9, 2014 10:5	2 tester, sever	ו		2		DV Datail
Rejected	Jan 23	, 2015 10:38	3 Strezov, Jen	nifer		3		RA Detail
Deferred	Feb 05	i, 2015 16:5	0 McKesson, I	Elvis Bob		2		
								Patient
								Drug
Patient Strezov,	Jennifei			PHN: 775415615				Doctor
Status	Creatio	on Date	Rx Number	Transaction Description	-	Transaction N		
🔁 Rejected	Jan 23,	2015 10:38	502533	Record dispense processing	g request	Dispense Presc		
Queued	Jan 28,	2015 13:19	502533	Record dispense pickup req	juest l	Dispense Pickup		_og Off
Queued	Jan 29,	2015 07:46	502533	Suspend prescription reque	st s	Suspend Prescr		A Constants
•		m				4		More
Aba	ndon	Amend		Send Failed	Sen Defer	d red Refresh		Exit



## DIS Network Is Unavailable

When the connection to the Drug Information System is lost, or the network is down, you should first confirm that the DIS is down by contacting the PharmaClik Rx Customer Care team. Once it is confirmed the DIS is down, your pharmacy has the following options:

#### Set DIS Availability to No

If the Nova Scotia 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*'.

- 1. Select **More > Nova Scotia.** The 'DIS Preferences' window appears.
- 2. Select No from the DIS Availability dropdown list.

🍀 DIS Preferences		×	
DIS Preferences DIS Availability			
Patient Search Default:	Local		
Dispense Pickup:	Manual		0.0-1
# Day we vieve	540 ~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	٦	3. Select the <b>OK</b>
button. A window		ap	pears.

- 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.

When the DIS Availability is set to NO, the following prompt will appear when users attempt to perform a query (i.e. patient search on the client registry or EHR Query on a patient's profile):





## **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.



## Medication Review App

The Medication Review App 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.

With the addition of the Drug Information System (DIS), some write back features have been disabled due to the messages that need to be transmitted to the DIS. For example, *Inactivating Rx's* or *Adding Other Medication* will not be available in the Medication Review App for pharmacies in Nova Scotia at this time.

Prior to completing a medication review, a view of the Patient's EHR Profile on the DIS is required. During the medication review, any local change made to information that also resides on the DIS <u>must</u> be updated in both places. Upon completion of the medication review, the billing prescription is automatically created on the **Workbench** > **To Do** tab in PharmaClik Rx.



The Medication Review App does not interact with the Nova Scotia DIS. All changes made in the Medication Review App are saved locally to PharmaClik Rx only. When any changes are made in the Medication Review App, users must manually transmit the information from PharmaClik Rx to the DIS.

Name.	SAM QUINTON	Health #:	000989	7924641		CONSENT
Phone:	(604) 922-6580	Birth Date:	Jul 17 1	917 (97 years old	)	CONSERT
Gender:	Male	Last Med Review:	N/A			EDIT LAB RESULTS
Height:						
Auto-Fill: inical Informat	Patient Not Enro	olled		Net Shioked		
Medical Type	Medical Item	s	Severity	Drug Name	Effective	ADD
Condition	DIABETES M	ELLITUS	Unknown		Aug 28 2013	
			1221			DETAILS



Since there is no interaction between the Medication Review App and the Nova Scotia 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- ALL** 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 App, 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:

	SAM 0009897924641 604-922-6580		Last Name:	QUINTON 07/17/1917	
Health#:					
Phone: (### ### ####)			Birth Date: (mm/dd/yyyy)		
Gender:	Mal	e 🔻			
Height:	0	ft O	inches	cm	
Weight:	0	Ibs		kgs	
Auto-Fill Enrollment:		•		Decline Reason:	•
				Employee ID #:	

In order to transmit any information that was updated in the Medication Review App to the Nova Scotia DIS, users must do the following in PharmaClik Rx:

- For Patient Demographic Information (i.e. address)
  - Use the Patient **Compare** button within the Main tab of the Patient Folder.
- For Patient Clinical Information (i.e. allergies)
  - Use the **Detail** button within the Clinical tab of the Patient Folder.
- For Drug Utilization Record (DUR) (i.e. vitamin c)
  - Highlight the DUR within the Profile tab of the Patient Folder and select Rx > Detail.
- **NOTE:** Nova Scotia pharmacies integrated with the DIS will not be able to Inactive Prescriptions or remove Lab Results from the Medication Review App as they may already exist on the patient's EHR on the DIS.



## Reports

PharmaClik Rx permits you to run reports that can assist you in managing your patients.

### **Non-DIS Transactions Report**

The Pharmacy Act requires that all dispenses in Nova Scotia be transmitted to the DIS. To support this professional obligation, the **Non-DIS Transactions** report is a new report you can run to view a list of all the dispense transactions that were not transmitted to the DIS, including prescriptions with an *Animal* status. This report should be reviewed weekly to evaluate if there are any prescriptions which should have been sent, but were not.



The **Non-DIS Transactions** report will only be available for users who have been granted access to the report by the Administrator (ADM). For more information, refer to the <u>Giving Users Access to the Non-DIS Transactions Report</u> section.

To run the Non-DIS Transactions report, do the following:

- 1. Select More > Reports.
- 2. Select **Prescription** from the side menu.
- 3. Highlight the Non-DIS Transactions report.
- 4. Select the Next button.
- 5. In the **Start Date** field, enter the start date for prescriptions you wish to view.
- 6. In the **End Date** field, enter the end date for the prescriptions you wish to view.
- 7. Enter in any other filter criteria for the report.
- 8. Select the **Preview** button.

PharmaClik Rx Reports: Select A Report					
PharmaClik Rx	Reports: Select A Report  Analysis by Doctor  Analysis by Drug  Custom Class Usage DB Capitation Reconciliation Dialogue List for Deliveries Dialogue Report Dosage Forecast Fee for Service Generic Lost Opportunities Limited Use Report Mixture Breakdown Report Mixture Breakdown Report	<ul> <li>Prescription Non-Compliance</li> <li>Prescription Stop Date</li> <li>Special Authorization Expiry</li> <li>Therapeutic Classification Statistic</li> <li>Therapeutic Interchange</li> <li>Time Analysis</li> <li>Transfer History</li> <li>Unfilled Refills</li> <li>Waiting for Pickup &amp; Delivery</li> </ul>			
	Narcotic Report Non-DIS Transactions Owe Balance Potential Missed Doses / Billings	Þ			



## Patient List Report

The **Patient List** report will have a new field that indicates the patient's PHN. You can now generate this report to view all your patients that currently do not have a PHN on file.

To run the Patient List report, do the following:

- 1. Select More > Reports.
- 2. Select **Patient** from the side menu.
- 3. Highlight the Patient List report.
- 4. Select the Next button.
- 5. In the **Start Date** field, enter the start date for patient's you wish to view.
- 6. In the **End Date** field, enter the end date for the patient's you wish to view.
- 7. Enter in any other filter criteria for the report.
- 8. Select the **Preview** button.

PharmaClik Rx I	Reports: Select A Report	
🔀 All Reports	📃 AutoFill Summary	Patient Profile
🚡 Accounting	📃 Compliance Blister Packaging	📃 Patient Profile Condensed
😳 Doctor	Consultation/Intervention Report	
🖉 Drug	Consultation/Intervention Report for MMUP Studies	
る Groups	Dosett	
🚺 Inventory	📃 Dosett - Alternate	
Patient	Dosett - Condensed	
Prescription	🔳 Dosett Grid	
C Scheduled	Inactive Patients List	
	📃 LH Extended Health Benefit Claim Form	
	Medication Dosage Calendar	
	📃 New Patients List	
	Patient List	
	Patient Mailing Labels	
	Patient Official Receipt	
	•	4



# Housekeeping

#### **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.



Only Pharmacists are permitted to merge patients. It is imperative to keep your patients records accurate and up to date. Avoid duplicates and ensure prior to synchronizing any patients that you confirm the patient is not in the local system more than once.

To merge two Patient Folders, do the following:

1. Select **More > Housekeeping > Merge > Patient**. The 'Patient Merge' window appears.

🕂 Patient Me	erge 🗾 🔀	
– <b>Target</b> – Patient:	McKesson, Elvis Bob	
Address:	123 McDover Drive Halifax, Nova Scotia B1B1B1 (902) 729-4531	
	<u>Search</u>	
Remove		
Patient:	McKesson, Elvis Jim	
Address:	12 Road Vancover, British Columbia. V1∨ 1∨1 (123) 456-7890 S <u>e</u> arch	
	<u>O</u> K <u>Cancel</u>	

- 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.
- 11. A validation prompt will appear to confirm the merge. 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.

**NOTE:** If the Target patient <u>is not</u> synchronized and the Remove patient <u>is</u> synchronized, a prompt will display indicating that the Target patient must be synchronized to complete the merge.

#### **Unmerging Patients**

If you have completed the Merge Patient, please contact PharmaClik Rx Customer Care at **1-800-387-6093** and request an unmerge of the Patient Folders. You will be required to identify the target patient's name, birth date, gender, and address information.



## PharmaClik Rx Customer Care

If you detect an issue with PharmaClik Rx or the Drug Information System (DIS), contact our PTS Customer Care team immediately. You must be able to 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.

**NOTE:** If you experience any issues with the DIS, the PTS Customer Care team will contact the Drug Information System Support team on your behalf, if required, to resolve the issue.

#### Hardware Support

Hardware questions, printer jams, non-responsive systems, IVR problems, etc

**1.800.387.6093** Select Option 1

Email: Non-Critical Issues ptscustomercare@mckesson.c

PharmaClik Rx Software Support PharmaClik POS Support

Dispensary questions, adjudication problems, drug file issues, suggestions, etc

**1.800.387.6093** Select Option 2

Email: Non-Critical Issues ptscustomercare@mckesson.ca

POS questions, Debit/Credit problems, till issues, promotion downloads, etc

**1.800.387.6093** Select Option 3

Email: Non-Critical Issues ptscustomercare@mckesson.ca

#### **1st Level Escalation**

If you have followed step 1 but the problem has not been resolved to your satisfaction, contact Customer Care and ask to speak with a Customer Care Supervisor. Email Customer Care Supervisors ptsccsupervisor@mckesson.ca Call 1.800.387.6093

#### **2nd Level Escalation**

If you have contacted a Customer Care Supervisor but feel that the problem has not been addressed to your satisfaction, contact Customer Care and ask to speak with a Customer Care Manager. Email Customer Care Manager ptsccmanager@mckesson.ca Call 1.800.387.6093



# Helpful Links

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

- DIS Website Information for Pharmacies section
   <a href="http://novascotia.ca/dhw/ehealth/DIS/information-for-pharmacies.asp">http://novascotia.ca/dhw/ehealth/DIS/information-for-pharmacies.asp</a>
- Nova Scotia Prescription Monitoring Program e-Access Portal <u>https://eaccess.nspmp.ca/ea/index.xhtml</u>
- DIS Support Website
   <u>http://disinfo.nshealth.ca/SitePages/Home.aspx</u>
- Drug Product Database Online Query
   <a href="http://webprod5.hc-sc.gc.ca/dpd-bdpp/start-debuter.do?lang=eng">http://webprod5.hc-sc.gc.ca/dpd-bdpp/start-debuter.do?lang=eng</a>

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, do the following:

- 1. Open your Internet Explorer (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.