CPR+
COMPLETE PATIENT RECORDS

Definitive Homecare Solutions

Enterprise SPRx List Manager User Guide

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For a complete list of **CPR+** documentation, please refer to the software's F1 Help.

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PRINTING NOTE FOR TWO-SIDED DOCUMENTS:

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Chapter 1 *Specialty Rx Workflow Management w/ Enterprise*

This course highlights the **Enterprise SPRx List Manager** workflow and demonstrates the flexibility of this tool in customizing patient care. The Specialty Rx List provides care management queues that reflect the workflow and processes of this niche industry.

At the conclusion of this chapter, the user will be able to:

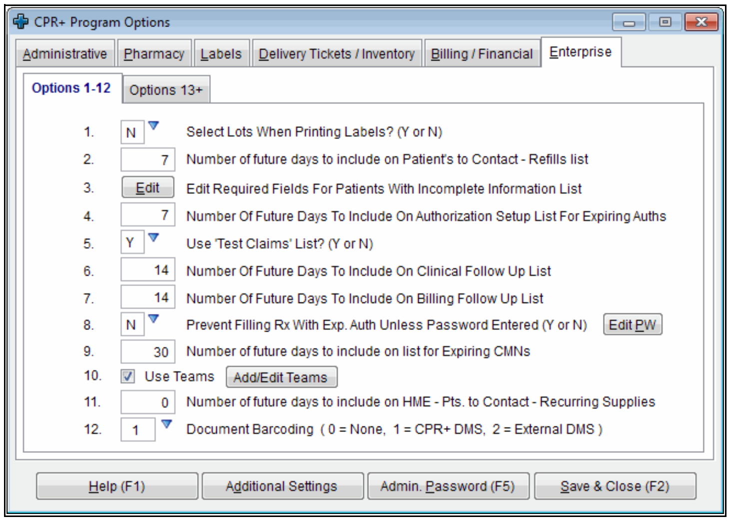
- Identify the lists that make up the **SpRx List Manager**.
- Define the program options that customizes this list manager.
- Identify the window elements that make up a manager’s window.
- Process a patient’s prescription scenario using the **SpRx List Manager**.

SpRx List Manager Introduction

The **Enterprise SpRx List Manager** is a queue-based system that displays the orders / prescriptions that are in each list with the ability to access these lists and work the orders / prescriptions.

Reviewing the Enterprise Program Options

Before using this **Enterprise List Manager**, there are several program options that need configured to suit your organization's processes. To adjust these options, go to **Utilities (8) > Program Options (4) > Enterprise tab**.



Below are explanations for each setting found on this window:

There are a few program options below that DO NOT apply to the SpRx List Manager.

1) **Select Lots When Printing Labels? (Y or N)**

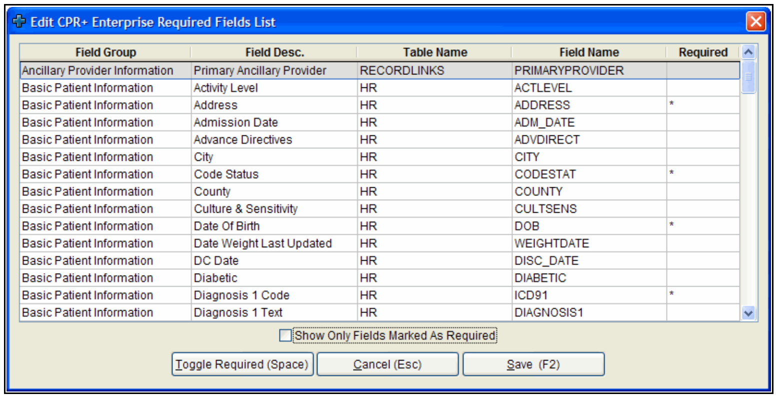
When selecting yes ('Y') for this option, CPR+ displays a prompt for the user to select drug lots when printing a label when working from the *Print Labels / Documentation* list. Otherwise, select `N` to select lots from the *Select Lots / Fill Rx* list.

2) **Number of future days to include on Patients to Contact - Refills list**

The number entered in this field determines when prescription refills appear in the *Patients to Contact - Refills* list.

3) Edit Required Fields For Patients With Incomplete Information List

Click the **Edit** button to set certain fields to be required. Those patients with incomplete information are listed in the *Patients w/ Incomplete Info* list.



What fields are required depends on the organization, but it will help to make sure that the data captured is complete. By default **CPR+** contains 30 required fields.

While on this window, toggle on or off which fields need to be completed by using the **Toggle Required (Space)** button. When a field is required, an asterisk (*) appears in the corresponding field under the **Required** column.

After configuring this list, click **Save (F2)** to save the settings.

4) Number Of Future Days To Include On Authorization Setup List For Expiring Auths

Enter the number of days in the future for an authorization to appear on the *Authorizations* list before it expires.

5) Use 'Test Claims' List? (Y or N)

Select yes ('Y') for this option to have the *Test Claims* list to appear in the IV List Manager. This list is not covered in this chapter, and **does not apply** to the SpRx and HME List Managers.

6) Number of Future Days To Include On Clinical Follow Up List

Enter the number of days in the future for a follow up to appear on the *Clinical Follow Up* list.

7) Number of Future Days To Include On Billing Follow Up List

Enter the number of days in the future for a follow up to appear on the *Billing Follow Up* list.

8) **Prevent Filling Rx with Exp. Auth Unless Password Entered (Y or N)**

   When this option is set to yes ('Y'), the pharmacist must enter his or her password to fill a prescription that has an expired authorization.

9) **Number of future days to include on list of Expiring CMNs**

   Enter the number of future days in this field to show expiring CMNs on the *CMN/SMN Tracking* list. This option **only applies** to the HME List Manager.

10) **Use Teams (checkbox)**

    When checking this box, an *Add/Edit Teams* drop-down appears on the List Manager window. By activating this feature, it allows organizations using Enterprise to set up "teams" that "work" certain patients.

    With a company's patients assigned to a team, the Enterprise Lists can be filtered by a team from the associated drop-down. CPR+ will "remember the last setting" for each user and it will automatically select the team for the user accessing the List Manager.

11) **Number of future days to include on HME - Pts. to Contact - Recurring Supplies**

    Enter the number of future days in the available field to display those Recurring Supplies that need delivered. Any recurring supply that fall outside of the number of future days will not appear in this list. This option **only applies** to the HME List Manager.

12) **Document Barcoding (0 = None, 1 = CPR+ DMS, 2 = External DMS)**

    Select the type of document barcoding used by the organization: CPR+ DMS or External DMS. If External DMS is selected, a button appears on the Options tab located on the System Setup window.

    If none is selected for this option, no barcodes print on any forms.

13) **Print Documentation (0 = None, 1 = Document ID, 2 = Patient MRN, 3 = Patient ID)**

    This option works in conjunction with option #12: Document Barcoding. In the corresponding field, click the **blue arrow** to display a menu to select one of the following: None (0), Document ID (1), Patient MRN (2), or Patient ID (3). By selecting an option (1, 2, or 3), CPR+ prints the selected identifier on a variety of reports and documents.

    The reports and documents that contain this Document Identification include: Demographics, Medication Profile, Physician Orders, Supporting Documentation, Delivery Tickets, Progress Notes, Care Plans, Visit Reports, Assessments (including Custom Assessments), Pharmacy Work Orders, and Discharge Summary.

14) Default New Drug Orders As Specialty (SpRx) (Site-Specific)

This option is only related to the SpRx List Manager. When set to yes ('Y'), new drug orders are flagged as Specialty Rx orders. This setting is site specific when running CPR+ with the Multi-site module.

15) Number of Future Days To Include On SpRx Expiration / Zero Doses List

This option is only related to the SpRx List Manager. Enter the number of days before a prescription expires to have it appear on the *Rx Expiration & Zero Doses* list. These prescriptions will appear in the list highlighted in yellow.

16) Auto-Refresh Fax Count Interval (In Minutes)

Entering a number in this field "tells" CPR+ to refresh the count for the Incoming Faxes list every so many minutes while a user has the Enterprise List Manager window opened. If a 0 is entered in this field, CPR+ will not update the count automatically.

17) Fill non lot tracked Rx's in the Print Labels / Document list?

When this option is set to "Y" and if the "Use Lot Number Tracking" program option (Pharmacy tab, question number 1) is set to "N", then the "Select Lots / Fill Rx" list is disabled.

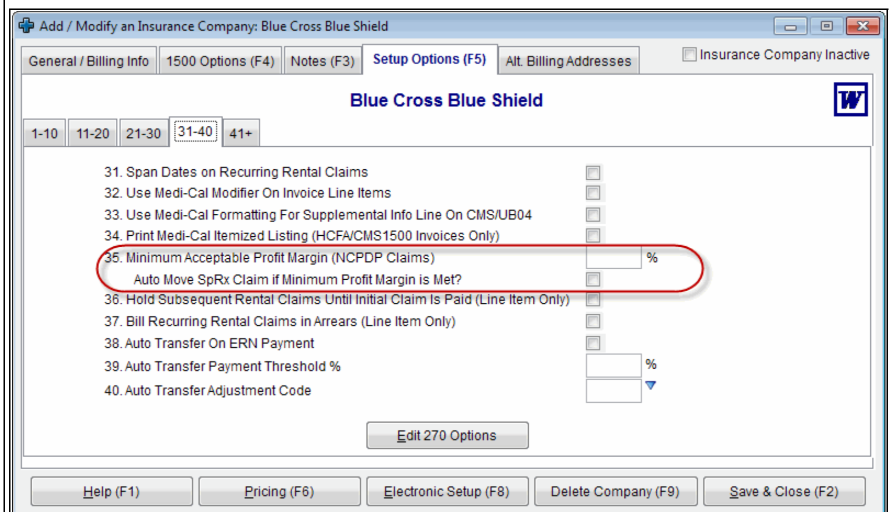
When processing an Rx in the "Print Labels / Documentation" list, and this program option is set to "Y", Rx's that do not require lot number selection are filled as part of the "Print Labels / Documentation" process and they skip the "Select Lots / Fill Rx" list.

Setting Up the Payor's Profit Margin

There is a payor setting the tells CPR+ the expected profit margin for a claim. Any claim that falls below this margin is then marked as `Margin` on the Claims to Adjudicate window.

To set the payor's profit margin, follow the steps outlined below.

Step	Action
1	From the **Main Menu**, go to **Databases (7) > Insurance Companies (4)**.
2	Select an electronic NCPDP payor in the list and click **Edit (F4)**.
3	Click the **Setup Options (F5)** tab and then click the **31-40** sub-tab.

Step	Action
4	While on this tab, the user can set the following options related to the SpRx List Manager: • Enter a profit margin for option #35 (Minimum Acceptable Profit Margin) in the available field. • Check the "Auto Move" box to automatically move claims from the Claims to Adjudicate list to the next list when the amount paid is within the acceptable profit margin percentage. 
5	Click **Save & Close (F2)** to save this setting.

Any claim that falls below the defined profit margin alerts the user to check the inventory item's pricing to see if it needs to be adjusted or to cancel the prescription.

Identifying the SpRx Faxes Path

A dedicated folder must be assigned for any incoming SpRx faxes. Without a identified folder, then any faxes received will not appear in the *Incoming Faxes* list.

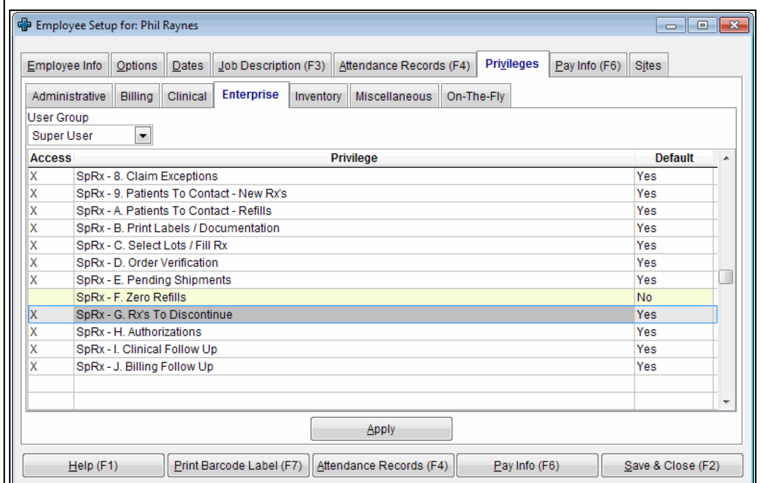
Follow the steps below to setup this location.

Step	Action
1	From the **Main Menu**, go to **Utilities (8) > System Setup (2)**.
2	Click the button next to the *Incoming Faxes Path (SpRx)* field.
3	Select the folder for SpRx faxes and click **OK** to add the path to the System Paths tab.
4	Click the **Save & Close (F2)** button to save this setting.

Setting Up Employee Privileges

There are several employee privilege settings related to the **Enterprise List Managers**. Follow the steps below to update an employee’s privileges.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>From the Main Menu, go to Databases (7) > Employee Data / Security Setup (8).</td></tr>
<tr><td>2</td><td>Select a user in the list and click Select (Enter).</td></tr>
<tr><td>3</td><td>Click the Privileges tab and then the Enterprise sub-tab.</td></tr>
<tr><td>4</td><td>Individual settings can be turned on (an X in the Access column) or off (no X in the Access column) by pressing the <Spacebar>.


</td></tr>
<tr><td>5</td><td>Click the Billing sub-tab and adjust the Allow user to change status and “Accept-F4” NCPDP claims setting if a user is to accept non-payable claims from the claim queues. Otherwise, the Accept button on the Claims to Adjudicate list will not be active.

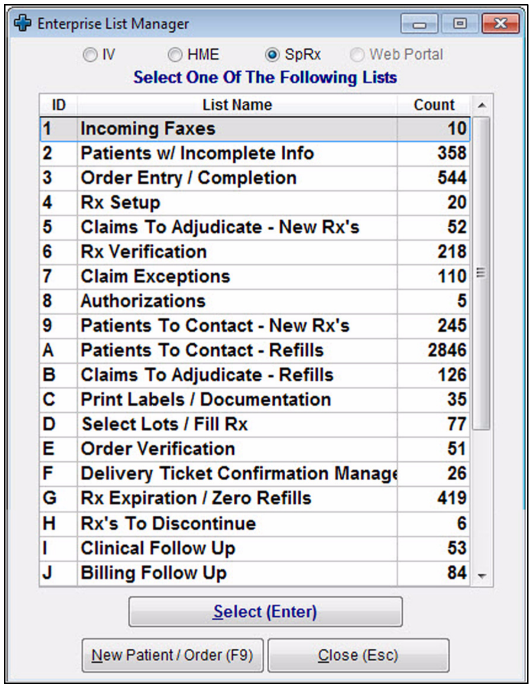
Note: The user will still be prompted to accept non-payable claims even if this privilege is turned on.</td></tr>
<tr><td>6</td><td>Click Apply after the privileges for the user are set.</td></tr>
</table>

In addition to configuring individual privileges, a User Group can be selected for a user to quickly assign privileges. Simply select a group from the *User Group* drop-down while on the Privileges tab.

User groups are defined by going to **Databases (7) > Templates (6) > User Groups (7)**.

Accessing the List Manager

To access the **SpRx List Manager**, click the **Enterprise** button from the Main Menu. (*The “Enterprise List Manager” window appears.*)



Verify that the SpRx radio button is selected to view the appropriate list. While on this list, a user can:

- Select a list and click the **Select (Enter)** button (or simply double-click the list name) to access the orders or prescriptions that are currently in that list.
- View the *Count* column for how many orders or prescriptions are in each list.
- Add a new Patient, new Drug Order or new HME / Supply Order by clicking the **New Patient / Order (F9)** button.

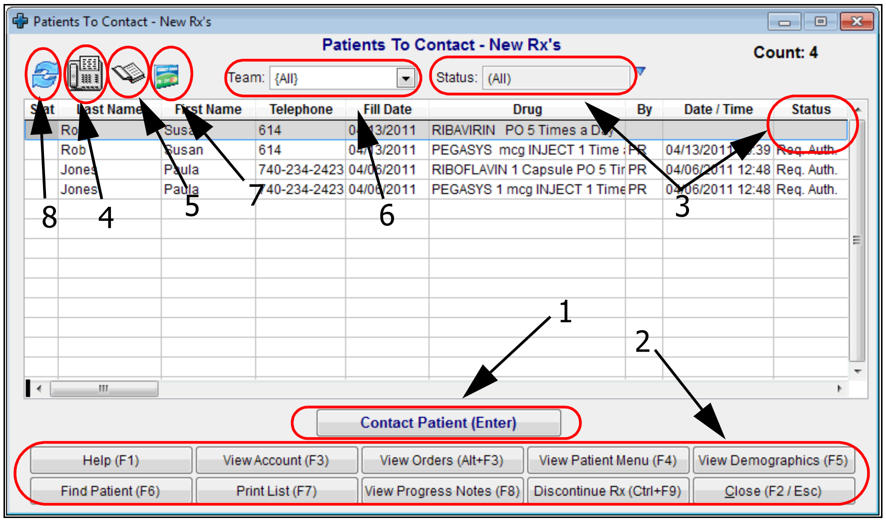
Displaying the Enterprise List Manager after Logging In

The **Enterprise List Manager** can be set to display automatically after a user logs into CPR+. Follow the steps below to configure this option.

Step	Action
1	From the **Main Menu**, go to **Databases (7) > Employee Data / Security Setup (8)** and select a user from the list.
2	Click **Select (Enter)**.
3	Click the **Options** tab on the Employee Setup window.
4	Set the *Enterprise on Startup* option to yes ('Y').
5	Click **Save & Close (F2)** to save the change.

Common List Manager Window Elements

Before discussing the list manager in detail, it's good to know the common window elements that appear on the SpRx List Manager windows. Let's review the window elements on the *Patients to Contact - New Rx's* list window.



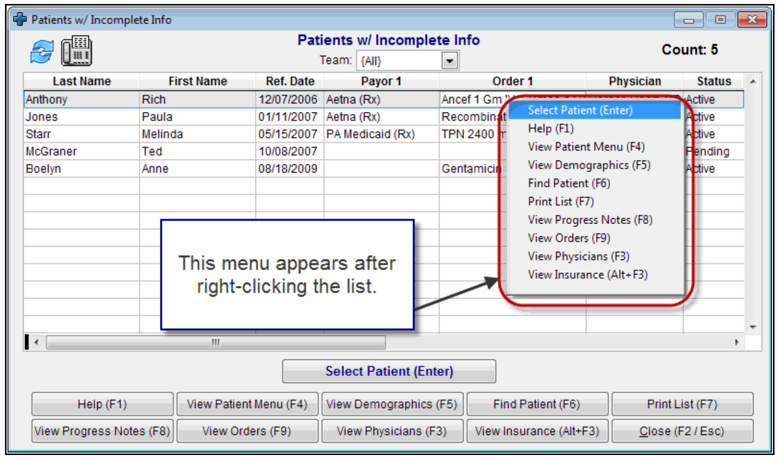
- **(1) Primary Buttons** – These buttons (with blue lettering) are used for the main task that must be accomplished on a particular list. For example, there is only one button on the *Patients to Contact - New Rx's* list labeled **Contact Patient (Enter)**. This allows the user to complete the main task for this window (contacting the patient and making the order ready) which moves the order to the next list.
- **(2) Ancillary Buttons** – These buttons along the bottom of each list are used to access certain CPR+ windows. For example, highlight a patient in the grid and click **View Patient Menu (F4)** and CPR+ opens the corresponding window. Or click the **View Orders (Alt+F3)** button and the list of patient orders is displayed.
- **(3) Status** - This column shows the current order's status. To filter this list, the user can select a specific status from the *Status* drop-down. CPR+ will then only show those orders marked with the selected status. In addition to several pre-defined statuses, additional ones can be added by going to **Databases (7) > Popup Windows (7) > select Enterprise List Status**.
- **(4) "View Faxes" Icon** – An order may have the initial Order / Script fax attached to it and other follow-up faxes during the course of therapy. Simply click the **View Faxes** icon to display the list of faxes and view the fax image on the window.
- **(5) "View History/Log" Icon** – As a patient order is processed through these lists, a log is kept to maintain a history of when each function was completed and who completed that function for each order. This allows a user to view when it came in, who did what and when it was completed.
- **(6) Team** - CPR+ allows organizations using Enterprise to set up "teams"

to "work" certain patients. Patients are assigned to a team on the Demographics tab of the Patient Information window. With patients assigned, a user can filter for his or her specific team and display only those assigned patients. Teams can be set up by going to **Utilities (8) > Program Options (4) > Enterprise tab > Program Option #10**.

- **(7) Credit Card Processing Icon** - With the optional PC Charge software from Verifone® installed, this button displays the Charge Credit Card window when clicked. From this window, the user can accept a patient's co-pay via credit card. This co-pay is considered as unapplied cash in CPR+.
- **(8) Refresh Icon** - Clicking this icon refreshes the data displayed in the list.
- **"In Use" Column** (available by scrolling the window to the right) – Since the lists can be accessed and used by multiple people at the same time, a mechanism is in place to "lock" orders or prescriptions so that only one person can work the item at a time. When the Primary Button is clicked, the item is locked and that user's initials are entered in the **In Use** column so that:
  - No one else can access that function for that item, and
  - Other users can see who is working on that list.

There are other items to keep in mind when using the **Enterprise List Manager**:

- **Flexibility** – Each list can remain open as other lists are accessed within CPR+. Most windows that are displayed by the lists, including viewing faxes, can remain open if another section of CPR+ needs accessed. This allows flexibility of getting what is needed to complete a task.
- **Sortable Columns** – Each column on every list can be sorted by that column. Simply click the column header and the list will re-sort in ascending order. By clicking the selected column a second time, the list is resorted in descending order.
- **Right-click Functionality** - Many of the lists in Enterprise have right-click functions that allow the user to quickly access features. While on a list, right click an entry to view what options are available from the associated drop-down menu.



Blue Arrow Icon

- **Blue Arrow Icon** - While editing information on any CPR+ window, remember to use the blue arrow icon. This icon (also called pop-ups) indicates there are default data values available for that field. Using these pop-ups help with consistent data entry throughout the program. To use this "pre-defined" data, click the **blue arrow** icon or press the **<F10>** key while the cursor is in that field to view the corresponding "pop-up" window.
- **The "Stat" Column** - Depending on the Enterprise window, any order marked as a "Stat Order" is labeled STAT in the corresponding column. Orders marked as STAT appear at the top of the list. This alerts the user to work these patients before working on the other orders that are not identified as a "Stat Order".

With a basic understanding of the **Enterprise List Manager** Program Options, how to access the list manager, and the common elements that make up a list manager window, the remainder of this session covers the individual lists and the process flow of a patient's order.

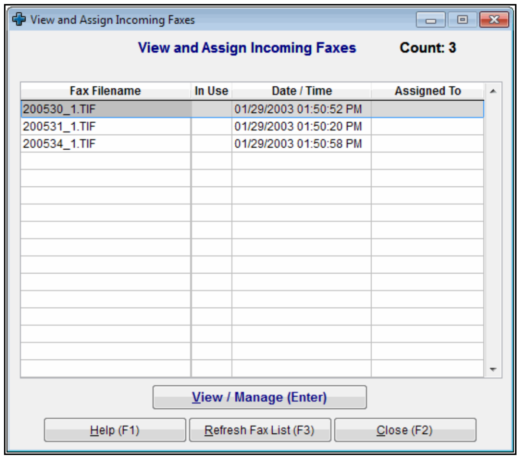
Enterprise SpRx Scenario

During this chapter, the following patient scenario will be used:

- A faxed is received about a 56-year-old Female patient diagnosed with Hepatitis C
- There are two prescriptions:
  — Pegasys 180 mcg, once a week
  — Ribavirin 1000 mg/day, PO.
- An electronic NCPDP payor is assigned to the patient.

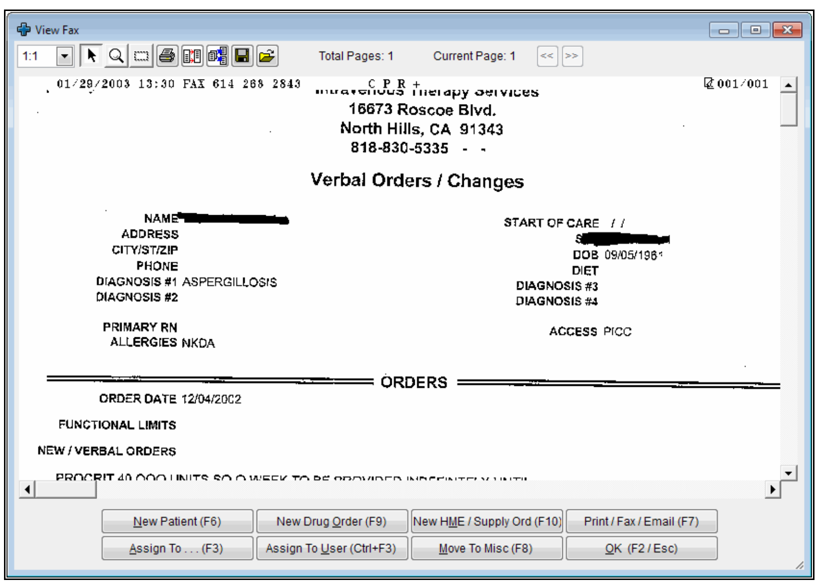
Incoming Faxes

This list allows access to the faxes that were received and displayed from the fax queue. To access this list, select **Incoming Faxes** and click the **Select (Enter)** button. (*The "View and Assign Incoming Faxes" window appears.*)



While on this list, the user can view, label and assign these faxes for permanent storage and retrieval. The faxes displayed in this list are simply image files of the received fax from the organization's fax server.

To view and then assign a fax, select one in the list and click the **View / Manager (Enter)** button to display the "View Fax" window. This attaches the user's initials to this fax and does not allow anyone else to view the same fax at the same time.



While on this window, a user can do the following related to the displayed fax:

- Add a new patient;
- Add a new drug order or refill a drug order;
- Add a new HME or supply order;

- Print, fax or email this document;
- Assign the fax to a patient, physician, payor, CPR+ user, supplier, ancillary provider, inventory item, or another department or category;
- Move the fax to the “Miscellaneous Fax” category.

While in the *Incoming Fax* list and the user is logged into “All Sites”, a fax can be assigned to any patient, not just those patients for the site where the fax was received.

The CPR+ User and Assigning & Attaching Faxes

There are two options related to CPR+ Users and faxes located on the “View Fax” window.

1) **Ctrl+F3** - This option simply links a selected CPR+ User to the fax and the name of the user will appear under the *Assigned To* column on the “View and Assign Incoming Faxes” window. This option does NOT attach the fax to the user.

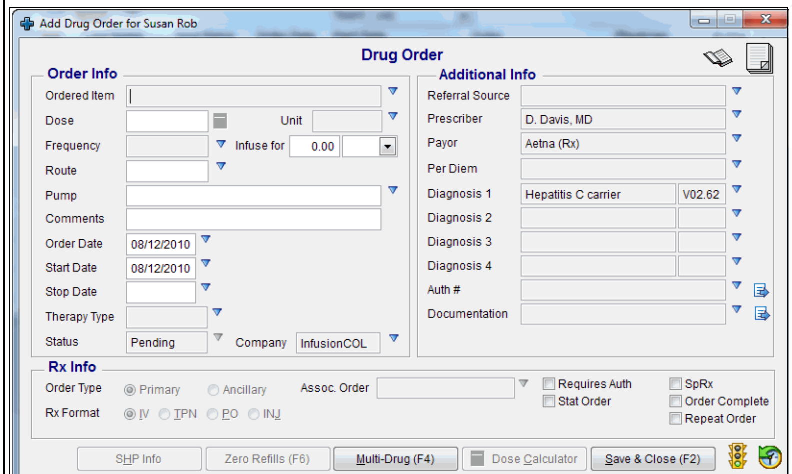
2) **F3** - This option will attach the fax to the Employee Record and remove the fax from the “View and Assign Incoming Faxes” window.

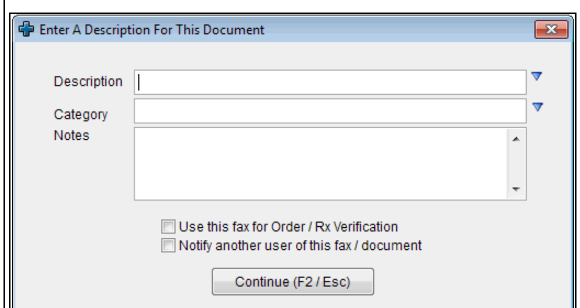
Assigning a Fax to a New Order

Below are the steps for creating a new order based on a fax.

Step	Action
1	Select a fax and then click the **View / Manage (Enter)** button to view the fax.
2	Click the **New Drug Order (F9)** button.
3	Start typing the last name of the patient in the *Seek* field or in the *Last, First* field.
4	Select the patient and click **Select (Enter)**.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5</td><td>While on the “Add Drug Order” window, click the Ordered Item blue arrow to access the Inventory File and select the drug for this order.


</td></tr>
<tr><td>6</td><td>Check the SpRx box (if not already checked).</td></tr>
<tr><td>7</td><td>Click Save & Close (F2) on the “Add Drug Order” window. The fax is now linked to the order and CPR+ will prompt for a document description.</td></tr>
<tr><td>8</td><td>Enter a description for the fax and click Continue (F2 / Esc).

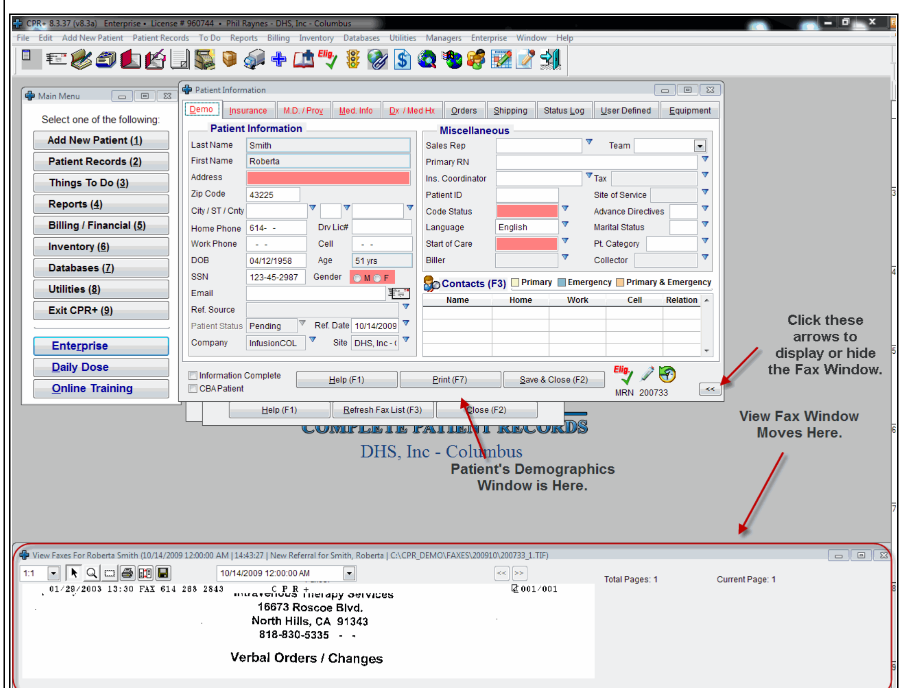


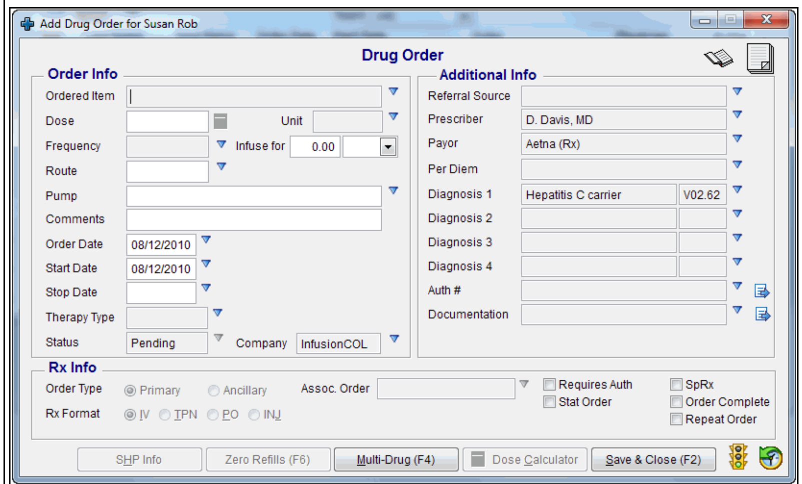
NOTE: When the “Use this fax for Order / Rx Verification” box is checked, this fax will display during Rx Setup and Rx Verification. This will mark this fax as the primary fax that is initiating the order.</td></tr>
</table>

The fax is removed from the *Incoming Faxes* list and is linked to the order. The new order may be accessed from the *Order Entry / Completion* list or the *Rx Setup* list if the Order Complete box was checked.

Assigning a Fax to a New Patient

Below are the steps for assigning a fax to a new patient.

Step	Action
1	Select a fax and then click the **View / Manage (Enter)** button to view the fax.
2	To see if the patient exists in CPR+, click the **Assign To...(F3)** button on the "View Fax" window.
3	Click the **Patient (1)** button on the Assign Document menu.
4	Start typing the last name of the patient in the *Seek* field, or enter the name in the *Last, First* field and then press the **<Enter>** key to locate the patient.
5	Does the patient exist? • If this patient does not exist, go to step 6. • If this patient does exist, go to the "Assigning a Fax to an Existing Patient" section on page 16.
6	Click the **Cancel (Esc)** button on the "Select Patient" window.
7	Click the **New Patient (F6)** button on the "View and Assign Incoming Faxes" window.
8	Complete the fields on the Enter New Patient Information window.
9	Click the **Continue (F2)** button to save the new patient's information. CPR+ adjusts the View Faxes window to the bottom of the screen to complete the new patient's information. 
10	If an order needs assigned, click the **Orders** tab and then click **Add Drug Order (F10)**.

Step	Action
11	While on the "Add Drug Order" window, click the **Ordered Item** blue arrow to access the Inventory File and select the drug for this order. 
12	Check the **SpRx** box (if not already checked).
13	Click **Save & Close (F2)** on the "Add Drug Order" window.
14	When done, click the **Save & Close (F2)** button on the "Patient Information" window.

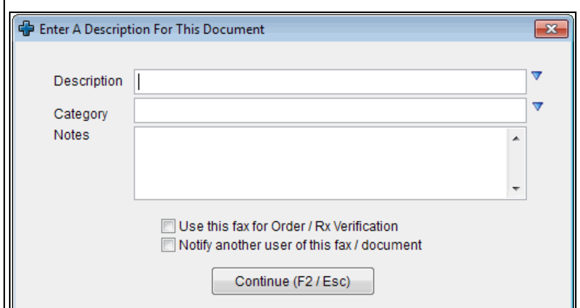
If a drug order or orders were added during these steps, the fax will be attached to the order (or first order if more than one was added). If no orders were added, then the fax will be attached to the patient.

The fax is removed from the *Incoming Faxes* list. The new order may be accessed from the *Order Entry / Completion* list or the *Rx Setup* list if the Order Complete box was checked.

Assigning a Fax to an Existing Patient

Below are the steps for assigning a fax to an existing patient.

Step	Action
1	Select a fax and then click the **View / Manage (Enter)** button to view the fax.
2	Click the **Assign To...(F3)** button on the "View Fax" window.
3	Click the **Patient (1)** button on the Assign Document menu.
4	Start typing the last name of the patient in the Seek field, or enter the name in the Last, First field and then press the **<Enter>** key to locate the patient.
5	Select the patient and click **Select (Enter)**.

Step	Action
6	Is this fax assigned to an existing order or a new order, or is this just to update the patient's existing information? • If this is an existing order, go to step 7a. • If this is a new order, go to step 8a. • If this is updated patient information, press the **<Esc>** key and go to step 9.
7a	Select an existing order assigned to the patient on the Order Selection window.
7b	Click **Select (Enter)**. (Now proceed to step 9.)
8a	Click **Add a New Entry (F10)**.
8b	Select the drug from the list and click **Select (Enter)**. (Now proceed to step 9.)
9	The fax is linked to the order (or linked to the patient if the **<Esc>** key is pressed during step 6) and CPR+ will prompt for a document description.
10	Enter a description for the fax and click **Continue (F2 / Esc)**.  **NOTE:** When the **"**Use this fax for Order / Rx Verification**"** box is checked, this fax will display during Rx Setup and Rx Verification. This will mark this fax as the primary fax that is initiating the order.

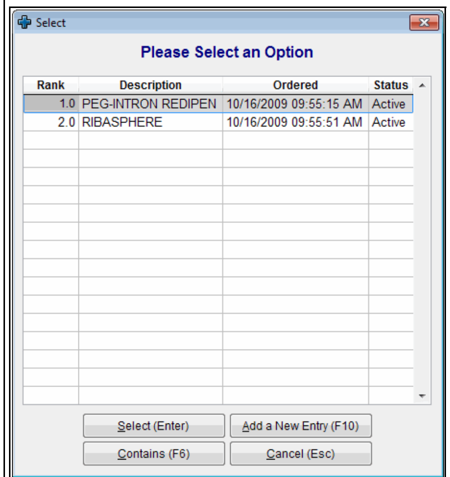
The fax is removed from the *Incoming Faxes* list and is linked to the patient's order (or patient). The new order may be accessed from the *Order Entry / Completion* list or the *Rx Setup* list if the Order Complete box was checked.

Refill Requests

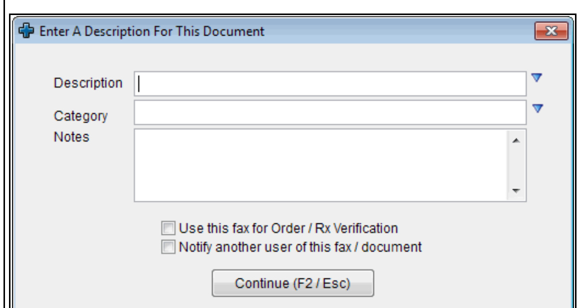
Below are the steps for refill requests while on the *Incoming Faxes* list.

Step	Action
1	Select a fax and click **View / Manage (Enter)** to view the fax.
2	Click the **Assign To...(F3)** button on the "View Fax" window.
3	Click the **Patient (1)** button on the Assign Document menu.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4</td><td>Start typing the last name of the patient in the Seek field, or enter the name the Last, First field and then press the <Enter> key to locate the patient.</td></tr>
<tr><td>5</td><td>Select the patient and click Select (Enter) and a list of orders is displayed.



</td></tr>
<tr><td>6</td><td>Select an existing order assigned to the patient that is in the Rx Expiration / Zero Refills list.</td></tr>
<tr><td>7</td><td>Click Select (Enter).</td></tr>
<tr><td>8</td><td>Click the Yes button on the "Refill Authorization" prompt. The fax is linked to the order.</td></tr>
<tr><td>9</td><td>Enter a description for the fax and click Continue (F2 / Esc).



NOTE: When the "Use this fax for Order / Rx Verification" box is checked, this fax will display during Rx Setup and Rx Verification. This will mark this fax as the primary fax that is initiating the order.</td></tr>
</table>

The following functions occur during a refill:

- The order is removed from the *Rx Expiration / Zero Refills* list.
- A new prescription is created (with new prescriptions numbers) based on the original prescription and is linked to the existing order.
- The original prescription is discontinued.

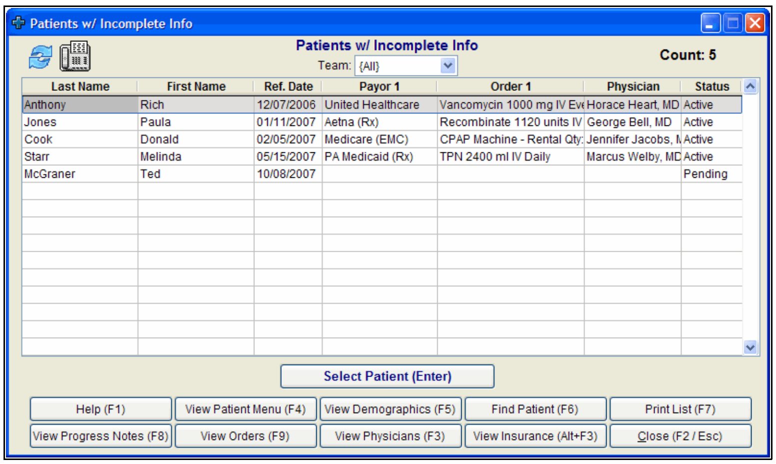
- The *Authorized Refill* box is checked automatically on the prescription.
- The order will move to the *Rx Verification* list.

Patients with Incomplete Information

This list is used to identify those patients with missing information. In order to maintain a smooth process flow of a patient, basic patient information must be collected and entered before filling the order and shipping it out (e.g. patient's address, Insurance Company / payor and so on).

Accessing the Patient's w/ Incomplete Info

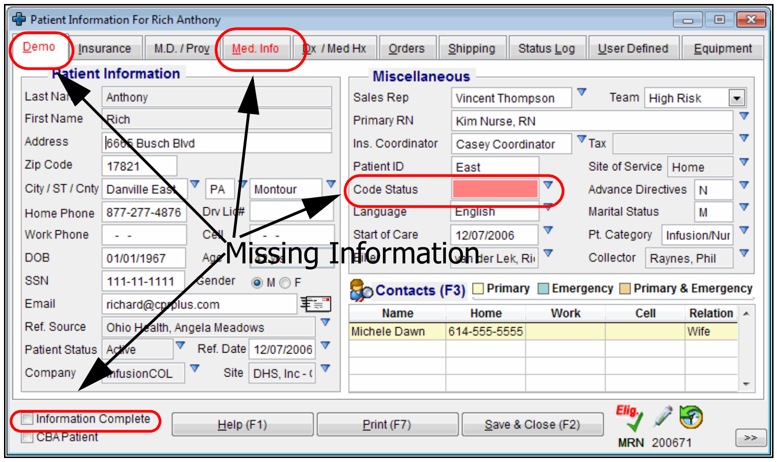
To access this list, select **Patient's w/ Incomplete Info** and click the **Select (Enter)** button. (*The "Patients w/ Incomplete Info" window appears.*)



This list displays all patients in **CPR+** that have one or more fields with missing information that are marked as required and/or the *Information Complete* checkbox is not selected.

The ability for a user to mark the *Information Complete* checkbox is a defined privilege within the Employee Setup section of **CPR+**.

To determine what information is missing, select a patient in the grid and click the **Select Patient (Enter)** button. Any missing fields are highlighted in **red** along with the tabs in which the fields reside.



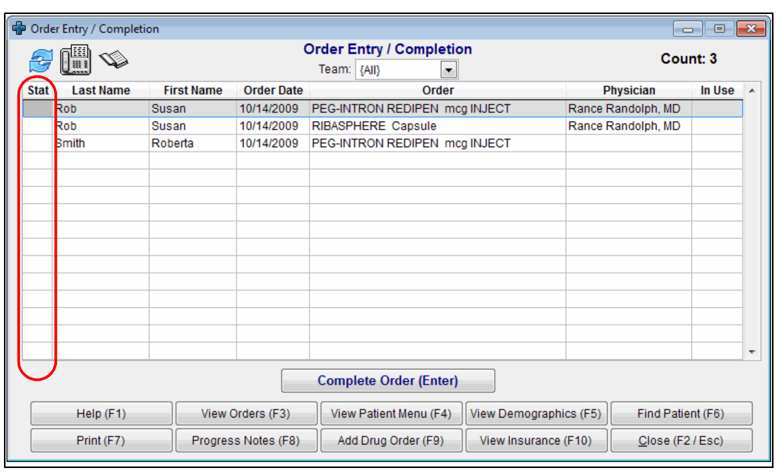
By completing the missing information for each patient and / or checking the *Information Completed* checkbox, the selected patient will "fall off" this list.

One thing to keep in mind, a patient with missing information does not exclude that individual from showing up in other lists in the **Enterprise List Manager**. This section is used to alert the user that this patient is missing information that could be vital to other parts of CPR+ (e.g. reporting or billing).

Order Entry / Completion

In this list, the order can be completed or updated. If your company does not want to use this list, the person loading the order in the fax queue can check the *Order Complete* box and the order will bypass this list.

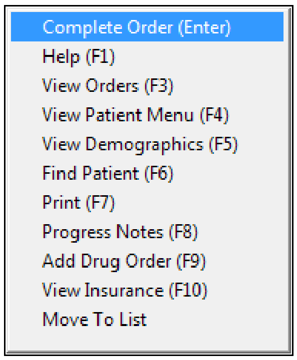
To access this list, select **Order Entry / Completion** and click the **Select (Enter)** button. (*The "Order Entry / Completion" window appears.*)



As new orders are placed in this list (by either clicking the **Add Drug Order (F9)** button or from the *Incoming Faxes* list), Enterprise allows the organization a degree of control over the confirmation and completion of an order. If orders are entered by an intake person and it's required that the order be reviewed for accuracy and completeness, this list allows clinically-oriented staff to verify and complete the entry of these orders (by selecting the *Order Complete* checkbox) before moving them to the next list.

If needed, the clinical staff can set this order as a Stat Order which places the order at the top of the upcoming lists and marks the corresponding *Stat* column with STAT.

A user can right-click any order in the list to display a dropdown menu.

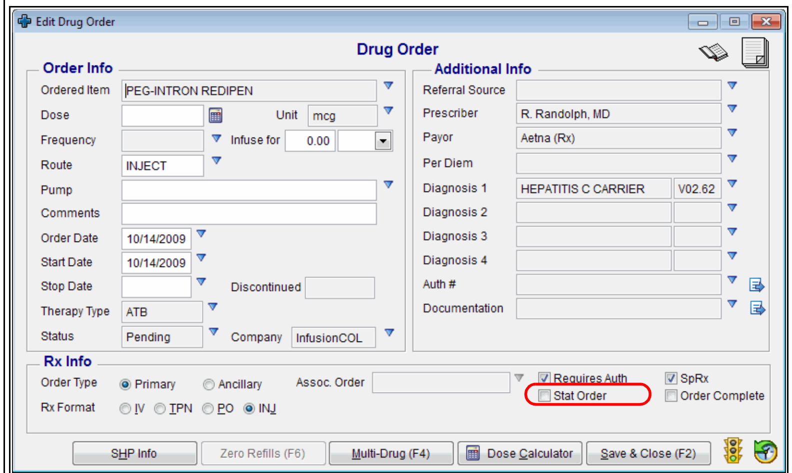


Working the Scenario

In our scenario, the orders for the patient were entered using the *Incoming Faxes* list. During this list, the orders need completed before moving on to the ***Rx Setup*** list.

Step	Action
1	Select an order in the list.
2	Click the **Complete Order (Enter)** button.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>Complete the remaining fields on the “Edit Drug Order” window.



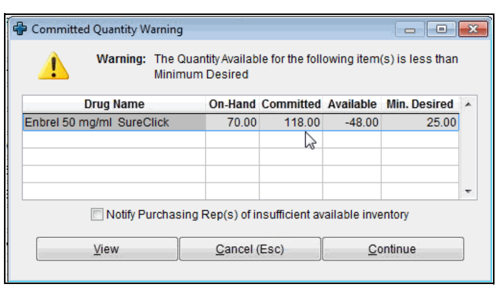
If this is a Stat Order, make sure to check the *Stat Order* box located in the Rx Info section of this window.</td></tr>
<tr><td>4</td><td>Review the order to verify the information is correct.</td></tr>
<tr><td>5</td><td>Click the Order Complete checkbox on the Edit Drug Order window.</td></tr>
<tr><td>6</td><td>Click the Yes button on the “Completing Order” prompt.</td></tr>
</table>

The above steps would be followed for each order for the patient. These orders would move off this list and to the *Rx Setup* list.

Completing an order does not change the status of the order. The order status remains pending until the prescription associated with the order is dispensed for the first time.

Committed Quantity Warnings

After clicking Yes on the “Completing Order” prompt, the user may be presented with a committed quantity warning.



As shown in the screenshot above, the committed quantity warning because inventory (for a drug and supply only) is below the minimum quantity set in CPR+. These warnings and how they work are based on the Delivery Ticket / Inventory Program Options #30 through #33.

Within the Enterprise SPRx Lists, quantity checks occur at:

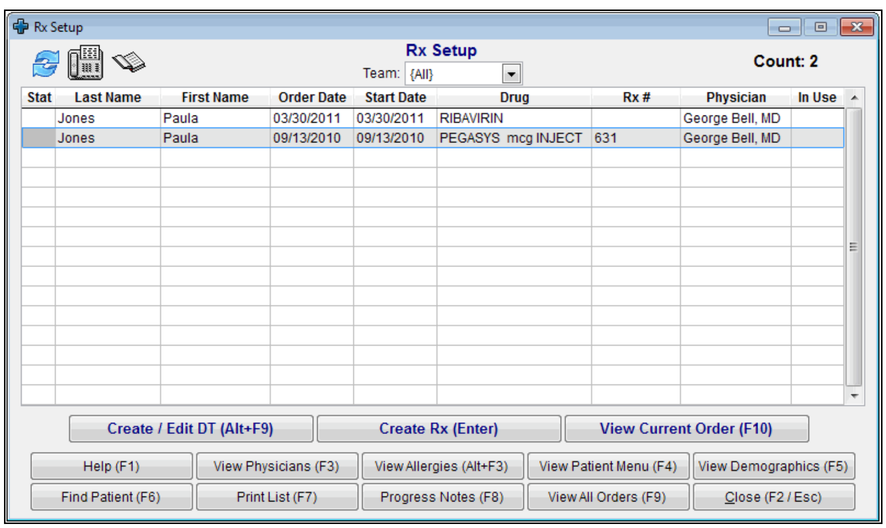
- Order Completion
- Rx Setup (when checked)
- Rx Verification;
- Patients to Contact (New or Refills) when the order is made ready and saved.

Keep in mind that these checks may appear when processing a prescription using the SPRx List Manager.

Rx Setup

In this list, the user will enter the prescription information, but the prescription is not filled.

To access this list, select **Rx Setup** and click the **Select (Enter)** button. (*The "Rx Setup" window appears.*)



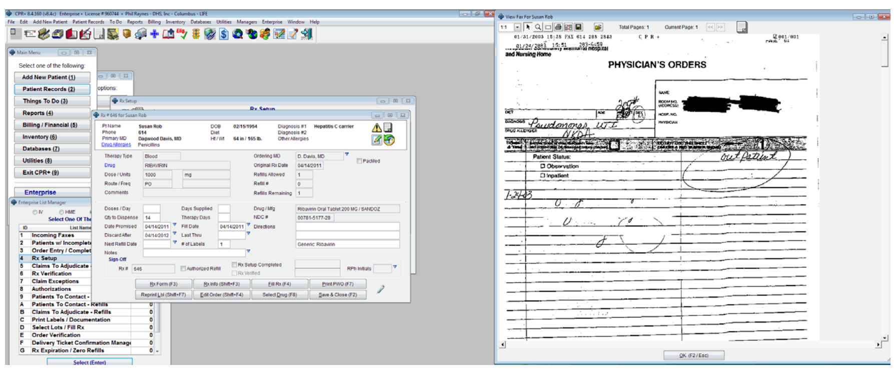
While on this list, the following functions can be accomplished.

- Setup a delivery ticket for the order by clicking the **Create / Edit DT (Alt+F9)** button.
- Mark the prescription as complete to move the order to the *Claims to Adjudicate - New Rx's* list (if a NCPDP payor is assigned to the patient) or the *Rx Verification* list.

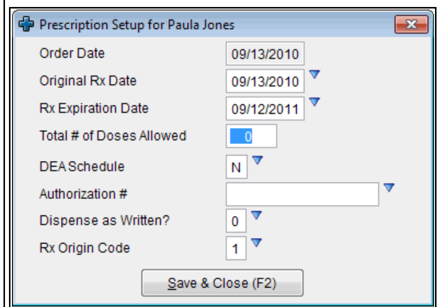
Working the Scenario

Processing the Injectable Order

This step-by-step follows an injectable order for the patient scenario.

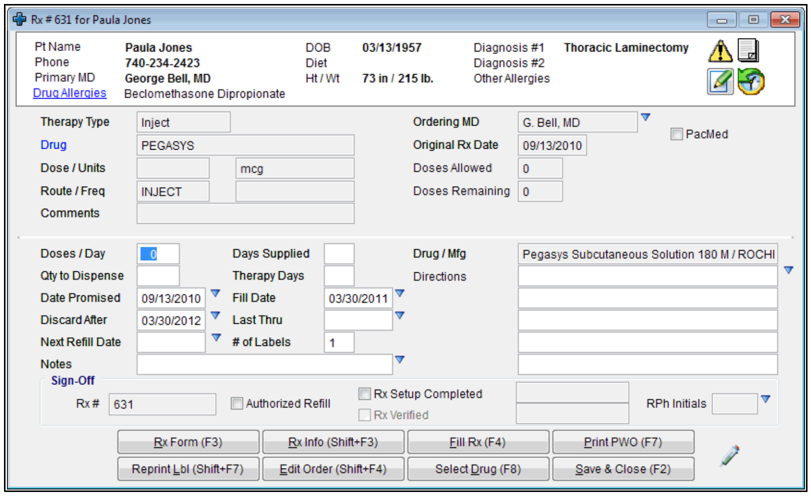
Step	Action
1	Select the Pegasys order in the list.
2	Click the **Create Rx (Enter)** button for drug screening (if Medi-Span is loaded). Review any screening results and complete the “Enter Your Response to the Drug Interaction” window if it appears.
3	After the drug screening, the Creating a New Rx menu is displayed. A prescription can be based on: • A prescription template • An existing prescription for this patient • An existing prescription for all patients • Or none of these (a prescription is created without any pre-determined information). **NOTE:** If a primary fax is assigned, it will open automatically. If the workstation is configured with dual monitors, the fax will appear on the second monitor automatically as shown in the figure below. 
4	For the scenario, click the **A Prescription Template (1)** button.
5	Select the appropriate template for this order. Note that a template can be created by going to **Database (7) > Templates (6) > Prescriptions (3)**.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>6</td><td>While on the “Prescription Setup” window, complete the fields for the injectable order.



Order Date - This is copied from the Order Date field on the order.
Original Rx Date - This is the date the prescription is created.
Rx Expiration Date - This defaults to one year from the Order Date based on the CPR+ system setting. Note that Schedule II, and Schedule III, IV and V drugs can have different expiration dates based on the Pharmacy Program Options for questions #12 and #13.
Total # Of Doses Allowed - This is based on the start and stop dates, and the frequency of the order.
DEA Schedule - This field is automatically populated from Inventory if the prescription is for a Schedule II, III, IV, or V drug.
Authorization # - This is a pre-determined authorization number given to your company by the patient’s primary insurance which is setup within the Insurance Verification section of CPR+. A verification number can be selected from the drop down.
Dispense as Written? - If this prescription is for an NCPDP payor and the user wanted a specific DAW to go on the NCPDP claim, this field would be completed by using the associated popup. This will carry over to the NCPDP claim.
Rx Origin - The Rx Origin pulls from the assigned NCPDP payor associated with the patient. The user can enter a different Rx Origin Code for this prescription if the code required is different than the payor’s default. This will carry over to the NCPDP claim.
</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>7</td><td>Click the Save & Close (F2) button and the “Pharmacy Injectable Work Order” window appears.



There are four icons at the top of this window:

View DUR (Drug Utilization Review) Info () - This icon displays any Medi-Span drug interactions. When the icon is Yellow, no drug interactions / contraindications found were found when the initial Medi-Span check was performed. If drug interactions / contraindications were found when the Medi-Span check was performed, the icon will be Red.

In addition to existing interactions, the user can perform a new drug interaction by selecting Medi-Span Check (F12) while on the Drug Interaction Log window.
View Fax () - This icon displays any faxes assigned to the patient or prescription will be displayed.
View Assessments () - This icon displays the assessments assigned to this patient.
Show History of Changes ()- This icon displays a list of any changes made to the fields on this window.
</td></tr>
<tr><td>8</td><td>Complete the fields on this window as it relates to the injectable order.</td></tr>
<tr><td>9</td><td>Once the prescription is setup, check the Rx Setup Completed box (within the Sign-Off section of this window).</td></tr>
<tr><td>10</td><td>Click the Yes button on the “Mark Rx Setup Complete” prompt.</td></tr>
<tr><td>11</td><td>Click Save & Close (F2) to close the prescription window.</td></tr>
</table>

CPR+ marks the prescription complete, closes the window, and moves the order off of the *Rx Setup* list. In this scenario, the patient has an NCPDP payor assigned so the order moves to the *Claims to Adjudicate - New Rx's* list and the initial claim is created.

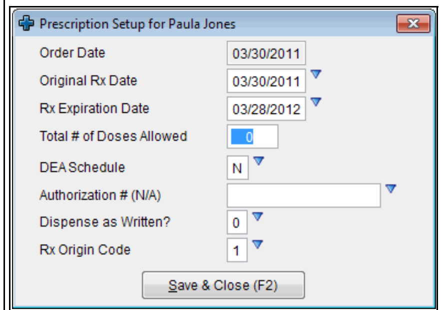
If the *Authorized Refill* box is checked even if it is a NCPDP payor and a new order, the order skips the *Claims to Adjudicate - New Rx's* list and automatically moves to *Rx Verification*.

All non-NCPDP payor orders are moved to the *Rx Verification* list.

Processing the P.O. Order

This step-by-step outlines the P.O. order for the scenario.

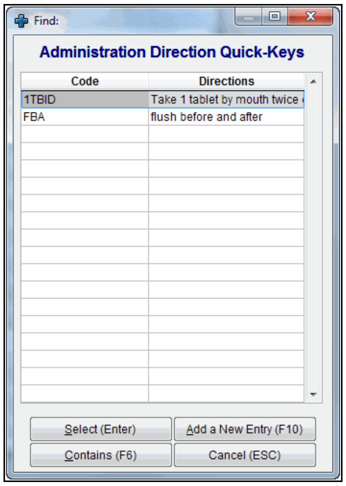
Step	Action
1	Select the order in the list.
2	Click the **Create Rx (Enter)** button for drug screening (if Medi-Span is loaded). Review any screening results and complete the "Enter Your Response to the Drug Interaction" window if it appears.
3	After the drug screening, click the **A Prescription Template (1)** button from the Creating a New Rx menu. **NOTE:** If a primary fax is assigned, it will open automatically. If the workstation is configured with dual monitors, the fax will appear on the second monitor automatically.
4	Select the appropriate template for this order.

Step	Action
5	While on the “Prescription Setup” window, complete the fields for the P.O.  • **Order Date** - This is copied from the *Order Date* field on the order. • **Original Rx Date** - This is the date the prescription is created. • **Rx Expiration Date** - This defaults to one year from the Order Date based on the CPR+ system setting. Note that Schedule II, and Schedule III, IV and V drugs can have different expiration dates based on the Pharmacy Program Options for questions #12 and #13. • **Qty to Dispense** - This is the number of items to dispense for this prescription. • **# of Refills Allowed** - This is the number of refills allowed for this P.O. prescription. • **DEA Schedule** - This field is automatically populated from Inventory if the prescription is for a Schedule II, III, IV, or V drug. • **Authorization #** - This is a pre-determined authorization number given to your company by the patient’s primary insurance which is setup within the Insurance Verification section of **CPR+**. • **Dispense as Written?** - If this prescription is for an NCPDP payor and the user wanted a specific DAW to go on the NCPDP claim, this field would be completed by using the associated popup. This will carry over to the NCPDP claim. • **Rx Origin** - The Rx Origin pulls from the assigned NCPDP payor associated with the patient. The user can enter a different Rx Origin Code for this prescription if the code required is different than the payor’s default. This will carry over to the NCPDP claim.
6	Click the **Save & Close (F2)** button and the Pharmacy P.O. Work Order window appears.
7	Complete the fields on this window as it relates to the P.O. scenario.
8	Once the prescription is setup, check the *Rx Setup Completed* box (within the Sign-Off section of this window).
9	Click the **Yes** button on the “Mark Rx Setup Complete” prompt.

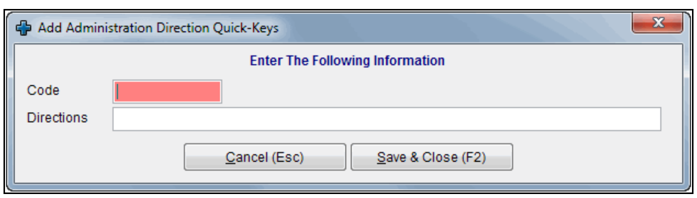
CPR+ marks the prescription complete, closes the window, and moves the order off this list. If the patient has an NCPDP payor assigned, the order moves to the *Claims* *to Adjudicate - New Rx's* list; otherwise, it moves to the *Rx Verification* list.

Quick Keys for Administration Directions

Quick Key codes are available for Administration Directions. The codes and their translations are added via the pop-up window under Administration Direction Quick Keys. From the Main Menu, go to **Databases (7) > Popup Windows (7) > select Administration Direction Quick-Keys**.



A new quick-key can be added by clicking the **Add a New Entry (F10)** button.

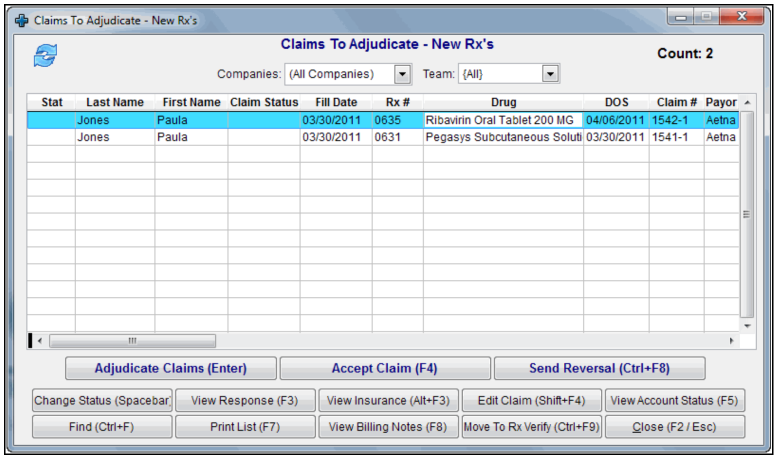


These quick-keys will work on the administration directions fields on any of the work order types (IV, TPN, PO, INJ). To use these quick-keys, the user will enter a quick-key code and then type a backslash "\". CPR+ will check for the code entered and then replace the quick-key code with the full directions.

Claims to Adjudicate - New Rx's

This list is automatically populated with prescriptions marked completed and with those patient's with an NCPDP payor assigned while in the *Rx Setup* list. From this list, the user can edit the pharmacy claim and transmit it to the payor.

To access this list, select **Claims to Adjudicate - New Rx's** and click the **Select (Enter)** button. (*The "Claims to Adjudicate - New Rx's" window appears.*)



The following color highlights may appear on this window:

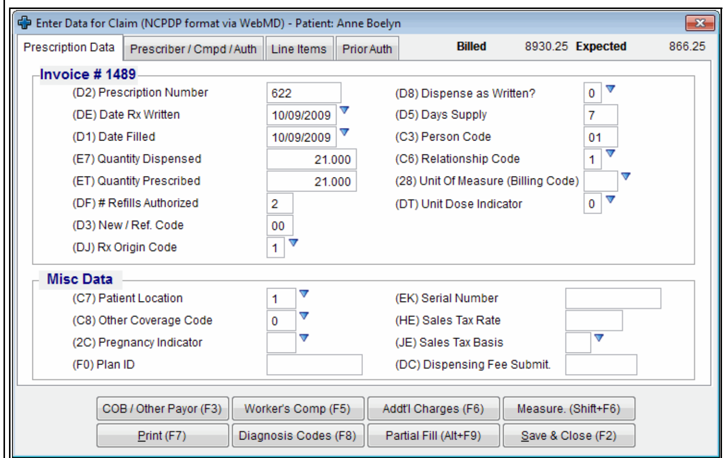
- **Yellow** - This represents claims marked / tagged as ready and will be submitted when adjudicating all claims.
- **Blue** - This represents the currently selected claim in the list.
- **Red** - This represents a claim that was rejected.
- **Green** - This represents a claim that is payable.

Adjudicate Claims

Below is a simplified process in adjudicating claims.

Step	Action
1	If the status of the claim is not set to `Ready`, click the **Change Status (Spacebar)** button until `Ready` appears in the *Claim Status* column.
2	Repeat the above steps for any claim in the list that is ready to adjudicate that is *In Use* by the same user.
3	With all claims marked as ready, click the **Adjudicate Claim (Enter)** button. **NOTE:** If any information for the patient is not setup correctly, CPR+ will display the appropriate prompt to inform the user on what needs to be corrected.

Step	Action
4	If any information for a claim needs edited, select the claim in the list and click the **Edit Claim (Shift+F4)** button. This displays the "Enter Data for Claim" window.



5	After editing the claim, click the **Save & Close (F2)** button to close the window.

When a claim meets the payor's profit margin, it can automatically leave this list and move to *Rx Verification*. This is accomplished by checking the *Auto Move SpRx Claim if Minimum Profit Margin is Met* box located in the payor's setup options. This can be accessed by going to **Databases (7) > Insurance Companies (4) > select Payor > select Setup Options > check #35 box**.

Resending a Claim with a Status of "Margin"

Any adjudicated claims that don't meet the profit margin, CPR+ automatically sets the *Claims Status* to "Margin". A user can then rework this claim so that it meets the profit margin for this payor by using the steps below.

Step	Action
1	View the response to the claim.
2	Select the claim in the list with a *Claim Status* of "Margin" and click the **Send Reversal (Ctrl+F8)** button.
3	Edit the claim by clicking the **Edit Claim (Shift+F4)** button.
4	After editing the claim to work the profit margin, click the **Save & Close (F2)** button to close the window.
5	If the status of the claim is not set to `Ready`, click the **Change Status (Spacebar)** button until `Ready` appears in the *Claim Status* column.
6	Click the **Adjudicate Claim (Enter)** button.

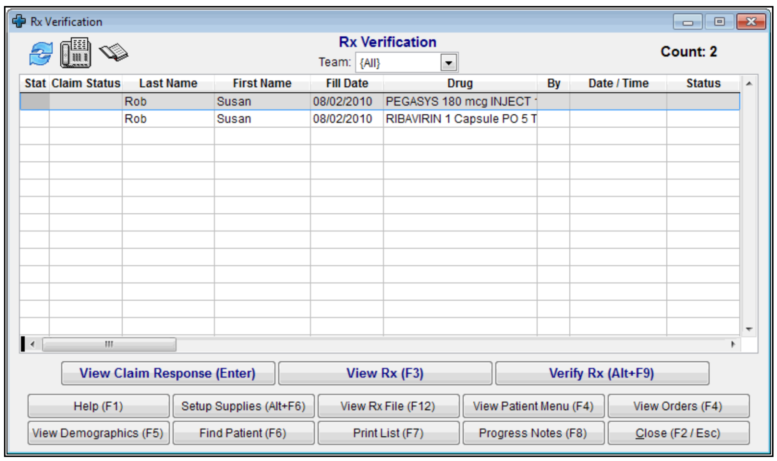
If the claim still has a status of "Margin", the user can do one of the following:

- Click the **Accept Claim (F4)** button to move the claim manually to the ***Rx Verification*** list.
- Right-click the claim, select the **Move to List** option, and then select the ***Rx Verification*** list.
- Right-click the claim, select **Move to List**, and then select Claim Exception. After the Claim Exception list, the order will move to *Rx Verification*.

Rx Verification

Prescriptions that appear in this list where moved from either the *Rx Setup* or *Claims to Adjudicate - New Rx's* list. These prescriptions must be verified by the pharmacist before moving to the *Patients to Contact - New Rx's* list.

To access this list, select **Rx Verification** and click the **Select (Enter)** button. (*The "Rx Verification" window appears.*)

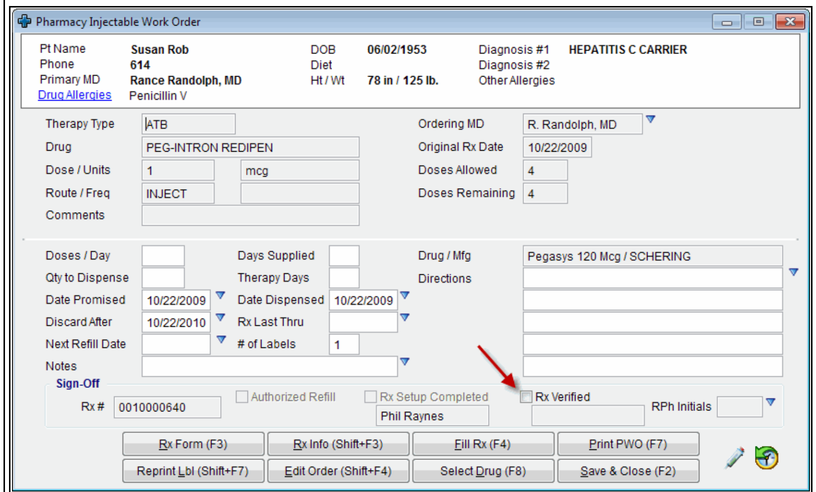


Working the Scenario

The table below identifies the steps on verifying the prescription.

Step	Action
1	Select a prescription in the list.
2	Click the **View Rx (F3)** button to display the prescription's work order window. **NOTE:** If a primary fax is assigned, it will open automatically. If the workstation is configured with dual monitors, the fax will appear on the second monitor automatically.
3	Review the prescription and make any adjustments as needed.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4</td><td>Check the Rx Verified box.


</td></tr>
<tr><td>5</td><td>The user is prompted to move the prescription to one of three lists:

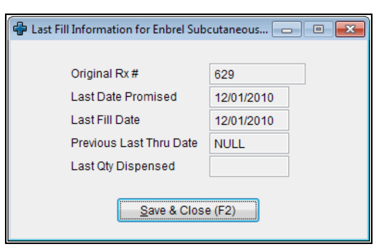
Patients to Contact New Rx - This option is highlighted when the claim is payable or associated with major medical.
Claims Exceptions - This option is highlighted when claim is rejected.
Patients to Contact - Refills - This option is highlighted when the Authorized Refill box was checked in the Rx Setup list.
</td></tr>
</table>

The prescription leaves this list and is moved to the selected list in step 5. The pharmacist would repeat these steps for each prescription in the *Rx Verification* list.

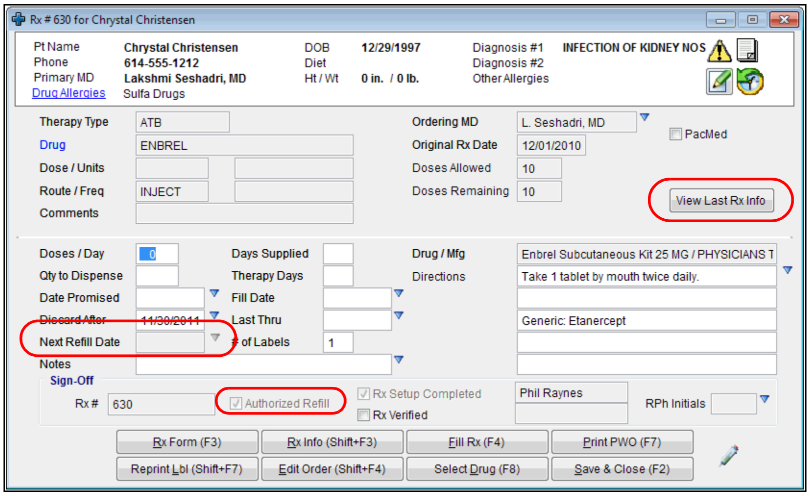
Refill-based Prescriptions

Prescriptions that appear in the Rx Verification list maybe based on an authorized refill. You can identify this when the *Authorized Refill* box is checked. When this is the case, there are two things to keep in mind about the prescription's work order window:

- View the last prescription information by selecting **View Last Rx Info**.



- Populating the *Fill Date* field automatically populates the *Next Refill Date* field because this is actually a "new" prescription.

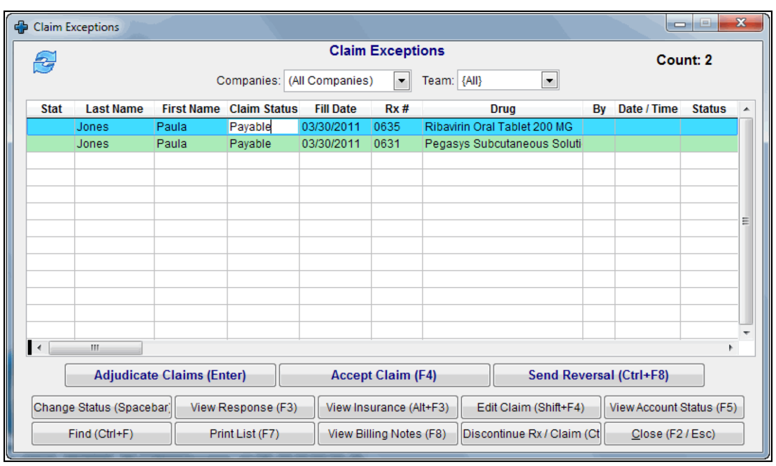


Claims Exceptions

Even though this is not part of this document's scenario, this section of the **List Manager** is used when claims have not met the payor's set profit margin or it is not payable. Only claims linked to a pharmacy (NCPDP) payor can be moved to this list manually from one of the following lists:

- Claims to Adjudicate - New Rx's / Refills
- Rx Verification.

To access this list, select **Claim Exceptions** and click the **Select (Enter)** button. (*The "Claim Exceptions" window appears.*)



An order / claim can be discontinued while on this list. Simply highlight the order and click the **Discontinue Rx / Claim** button. Orders discontinued will be moved to the *Rx's To Discontinued* list.

Adjudicate Claims

Below is a simplified process in adjudicating claims.

Step	Action
1	If the status of the claim is not set to `Ready`, click the **Change Status (Spacebar)** button until `Ready` appears in the *Claim Status* column.
2	Repeat the above steps for any claim in the list that is ready to adjudicate that is *In Use* by the same user.
3	With all claims marked as ready, click the **Adjudicate Claim (Enter)** button.
4	If any information for a claim needs edited, select the claim in the list and click the **Edit Claim (Shift+F4)** button. This displays the "Enter Data for Claim" window.
5	After editing the claim, click the **Save & Close (F2)** button to close the window.

When a claim meets the payor's profit margin, it can automatically leave this list and move to *Rx Verification*. This is accomplished by checking the *Auto Move SpRx Claim if Minimum Profit Margin is Met* box located in the payor's setup options. This can be accessed by going to **Databases (7) > Insurance Companies (4) > select Payor > select Setup Options > check #35 box**.

Manually Accepting Claims

To manually accept payable claims, the user would select a claim in the list, click the **Accept Claims (F4)** button, and the prescription moves to one of the following lists:

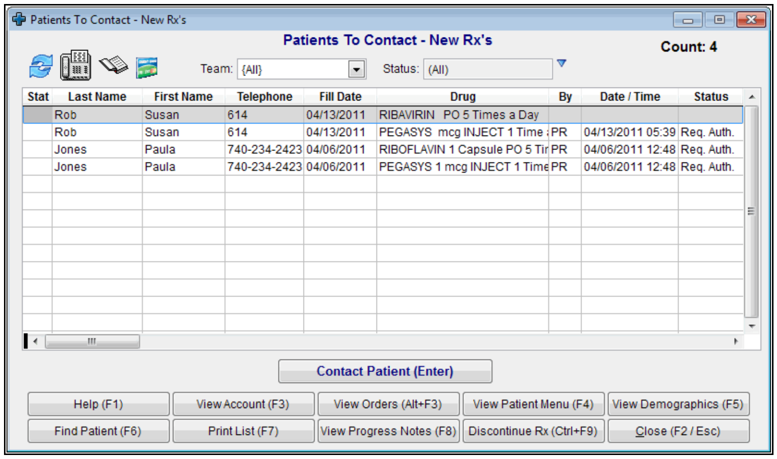
- *Patients to Contact - New Rx* list when the *Rx Verified* box is checked.
- *Rx Verification* list when it's a new prescription and the *Rx Verified* box is not checked.
- *Print Labels / Documentation* list when it came from the *Patients to Contact Refill* list.

Patient to Contact - New Rx's

While on this list, the assigned user or team can:

- Verify supplies needed for the delivery.
- Contact the patient to verify the shipping information and collect the patient's co-pay.
- Make the prescription ready to fill.
- View and edit required authorizations.

To access this list, select **Patients to Contact – New Rx's** and click the **Select (Enter)** button. (*The "Patients to Contact – New Rx's" window appears.*)



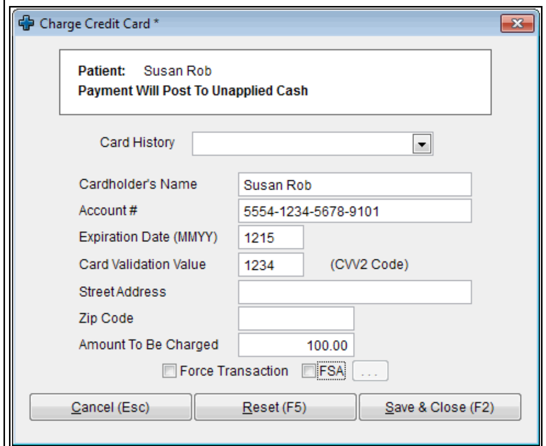
This list has one Primary Button labeled **Contact Patient (Enter)**. This button allows the user to apply a contact status to the patient (which appears in the *Status* column), update the Working Delivery Ticket for the patient's order and then mark the order ready to fill which moves the order to the next list.

Collect the Patient's Co-pay

CPR+ has the ability to process credit card transactions using an interface with the PC Charge software from VeriFone®. To access this interface, click the **Credit Card** icon. A billing note is created for each patient transaction using this interface and the co-pay collected is placed in unapplied cash. It will be applied to the patient's invoice when it is created during the confirmation process.

While on the phone with the patient, the user can complete the steps below to collect the co-pay.

Step	Action
1	Click the **Credit Card** icon on the Patient's to Contact - New Rx's window.
2	Select a company if the organization has installed the Multi-company or Multi-site module; otherwise, go to step 3.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>Complete the information on the Charge Credit Card window.


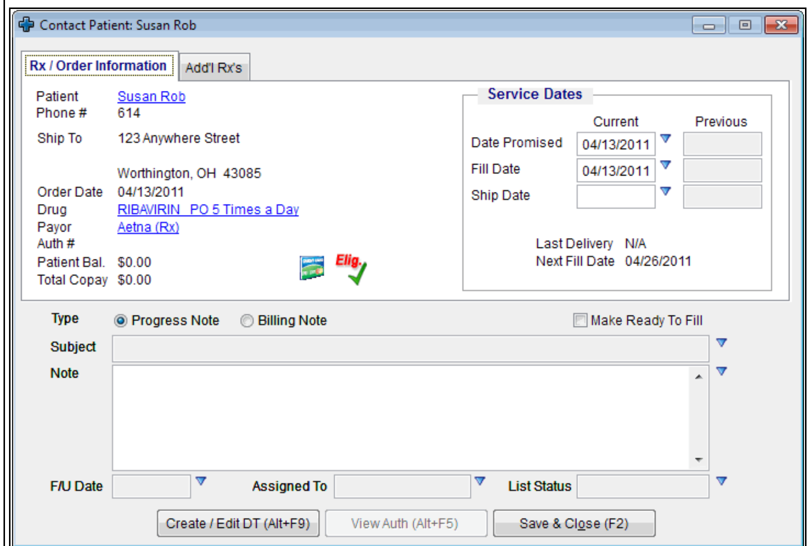
If the patient has used his or her credit card before, click the Card History drop down, select a previously used credit card, and most of the fields on this window are completed automatically.</td></tr>
<tr><td>4</td><td>Click the Save & Close (F2) button charge the credit card. Any payments posted from this window is added to the patient’s unapplied cash.</td></tr>
</table>

Working the Scenario

Based on the scenario, let’s walk through the steps in contacting the patient and make the prescription ready to fill.

Step	Action
1	Select the prescription in the list.
2	Click the **Contact Patient (Enter)** button.

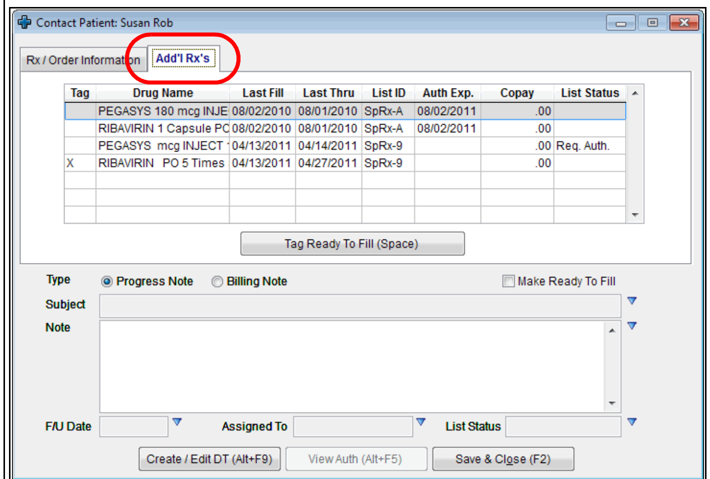
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>Complete any fields on this window as it relates to contacting the patient. A Progress Note or Billing Note can be created while on this window. Also, the user can click the hyperlinks to quickly access the patient menu, drug order window, the Add / Modify Insurance Company window, or the Authorization window.



The co-pay on the Contact Patient window will be the sum of all orders tagged on Add'l Rx's tab.</td></tr>
<tr><td>4</td><td>The user can use the List Status drop down to identify the status of contacting the patient. A status could be "Left Message" or "Will Call Back" and these are defined by going to Databases (7) > Popup Windows (7) and selecting Enterprise List Status from the Select Popup list. The defined statues must be no longer than 15 characters.

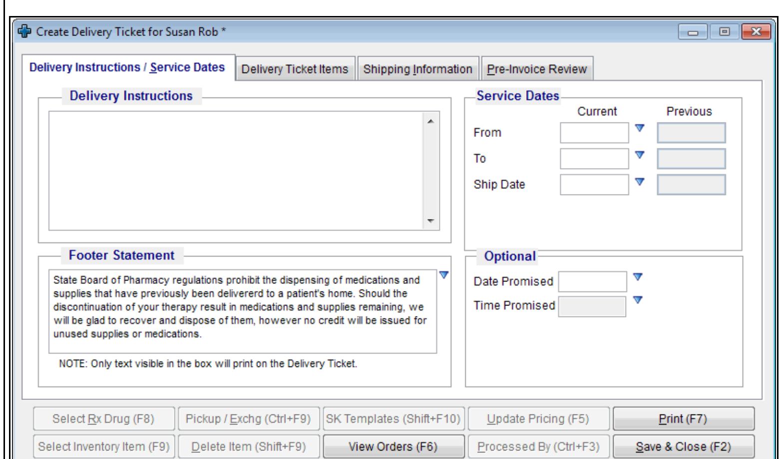
Any selection made on the Contact Patient window will appear in the Status column for an order found on several of the SPRX List Manager windows.</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5</td><td>If the patient has two or more orders (like in the scenario), the user can click the Add'l Rx's tab and link these orders. While on the Add'l Rx's tab, press the <Spacebar> key for each selected order that the user wants to link. This places an 'X' in the <i>Tag</i> column.



The user can only tag orders that are on the same list that are not flagged to require an authorization. Once tagged and linked, these orders will go through the remainder of the SPRX process flow together.</td></tr>
<tr><td>6</td><td>Click the Create / Edit DT (Alt+F9) button to create the Delivery Ticket.

A Delivery Ticket is required prior to printing the prescription. The ticket created here will be assigned to all orders marked on the Delivery Ticket Items tab.</td></tr>
<tr><td>7</td><td>The date fields do NOT need to be entered on the first tab of the Delivery Ticket as they will be populated automatically when the ticket is printed. The dates will come from the Contact Patient window in step 3 and the prescription.

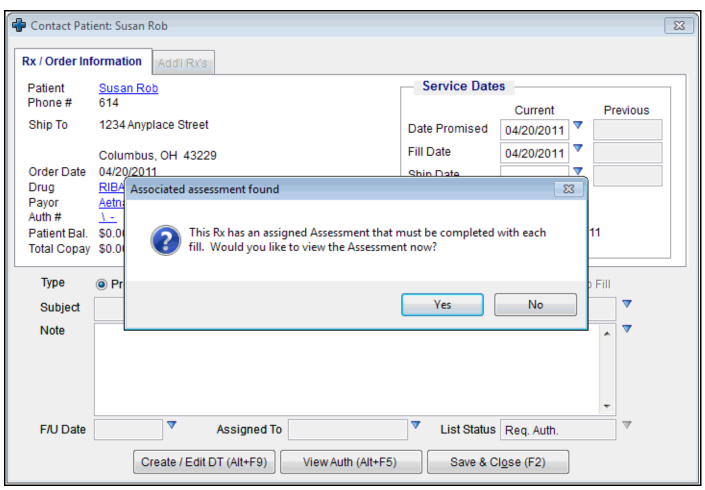

</td></tr>
</table>

Step	Action
8	If needed, click the **SK Templates (Shift+F10)** button and select the appropriate Supply Kit Template and remove any items not needed for the patient. The prescription will not be added during this step. It will be added when it is filled in the *Print Labels / Documentation* list.
9	If needed, click the **Shipping Information** tab to review or complete the shipping information for this order. This information will interface with the UPS or FedEx shipping software via a CPR+ SQL database table.
10	Click the **Save & Close (F2)** button to save the ticket and return to the Contact Patient window
11	Check the **Make Ready to Fill** box. This checkbox is not active when an authorization is needed or is not valid. An authorization is considered valid when the *Promise Date* falls between the start and stop date of the authorization.
12	Click the **Save & Close (F2)** button.

By following these steps, the order will leave this list and be moved to the *Print Labels / Documentation* list.

Assigned Patient Assessments

CPR+ may display a prompt about completing an assigned assessment similar to the one shown in the following screenshot.



This prompt is displayed based on the following settings in CPR+:

- Pharmacy Program Option #22 (prompt user to complete assigned Assessment when processing Rx) is set to yes ('Y'), and
- The inventory item on the patient's prescription has an assigned assessment which is configured on the inventory item's Clinical Info tab.

This prompt is not a hard stop in the process, and, if the assessment is not completed at this point, the document can be accessed later from the Clinical Documents Manager.

CPR+ will prompt about the assessment in the following SPRx Enterprise Lists:

- Rx Setup (reminder only is displayed when creating the prescription)
- Patient to Contact - New Rx's
- Patient to Contact - Refills.

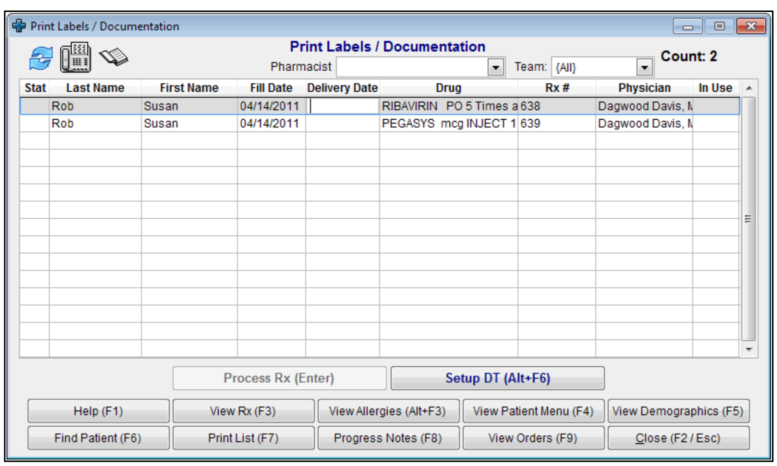
Print Labels / Documentation

This list allows the user to print the following documentation using just one button:

- Compounding Record
- Labels
- Drug Monograph
- Delivery Ticket.

In addition, the supplies for the Working Delivery Tickets can be setup while on this list.

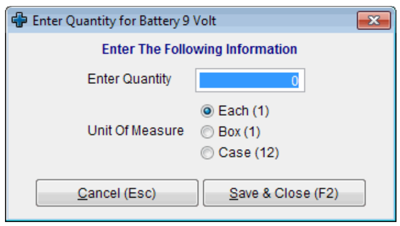
To access this list, select **Print Labels / Documentation** and click the **Select (Enter)** button. (*The "Print Labels / Documentation" window appears.*)



Setup Supplies

If a Delivery Ticket was not created prior to this, follow the steps below to add any supplies to the Delivery Ticket.

Step	Action
1	Select an order in the list.

Step	Action
2	Click the **Setup DT (Alt+F6)** button.
3	Click the **Delivery Ticket Items** tab on the Create Delivery Ticket window.
4	Click the **SK Templates (Shift+F10)** button to display a list of pre-defined templates created in CPR+ by the organization.
5	Select a template and click the **Select (Enter)** button.
6	Remove any items that may not be required for the order.
7	Any additional items can be added by clicking the **Select Inventory Item (F9)** button, selecting an item from the list, and entering the quantity for this ticket. 
8	Click the **Save & Close (F2)** button.

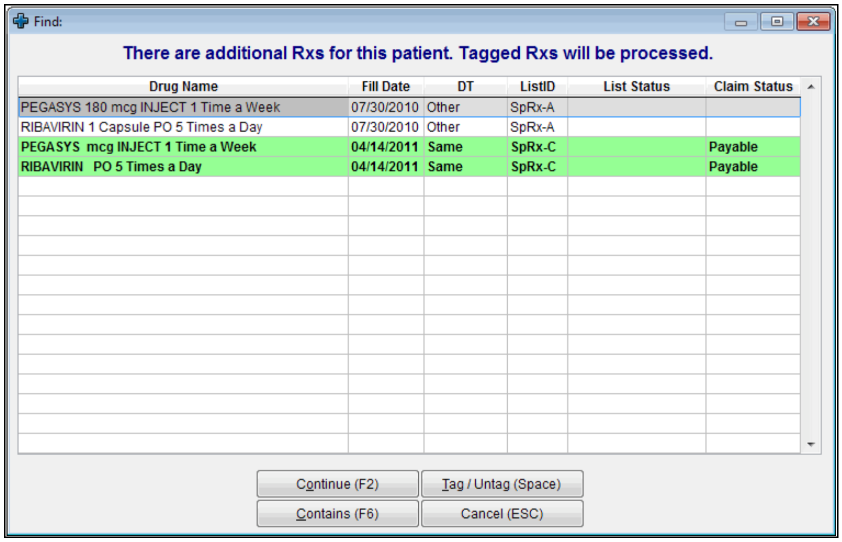
Processing the Prescriptions for the Scenario

Before processing the prescription, a Pharmacist must be selected in the *Pharmacist* dropdown. Otherwise, the Process Rx button will be grayed out and can not be selected.

If RPHInit is turned on, the selected pharmacist’s password must be entered. As long as this window is opened, this password will not need to be entered. If this window is closed and then opened again, the pharmacist must be selected and the password must be re-entered.

With a pharmacist selected and the patient’s prescription ready to process, the user selects the order in the list and clicks the **Process Rx (Enter)** button. If a Delivery Ticket has not been associated with the prescription, CPR+ displays a message that one needs to be created.

In the scenario, two orders where linked to the same Delivery Ticket. After clicking the **Process Rx (Enter)** button, CPR+ will display the following window for linked orders on a Delivery Ticket.



The above screen will appear when CPR+ knows that there are multiple prescriptions for a patient. Orders that are already linked will be highlighted in green. The user can tag other orders that could be on the same Delivery Ticket.

By clicking the **Continue (F2)** button, CPR+ will print all documentation for both orders that are linked to the same Delivery Ticket.

Orders are moved from this list to the *Select Lots / Fill Rx* list.

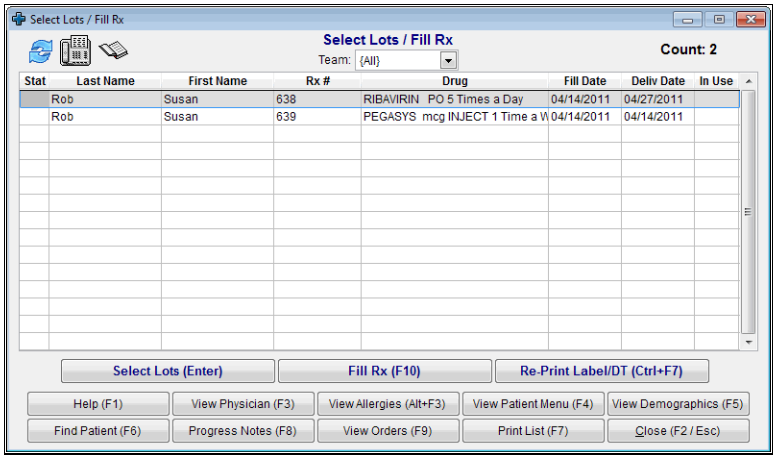
Select Lots / Fill Rx

The **SpRx List Manager** contains a confirmation step before the following events can take place:

- Selecting lot numbers;
- Relieving inventory;
- Updating the Prescription Dispensed Log and Lot Number logs.

It's this list that qualifies the above items before moving the order onto the next list.

To access this list, select **Select Lots / Fill Rx** and click the **Select (Enter)** button. (*The "Select Lots / Fill Rx" window appears.*)



If at anytime the documentation does not print correctly, the user can click the **Re-Print Label/DT (Ctrl+F7)** button to print this documentation again. The user can also select this function from the right-click menu.

Non-Lot Tracked Prescriptions Options

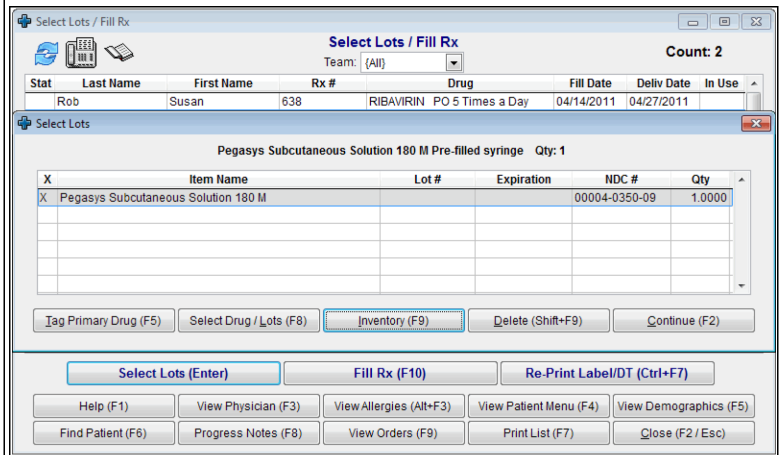
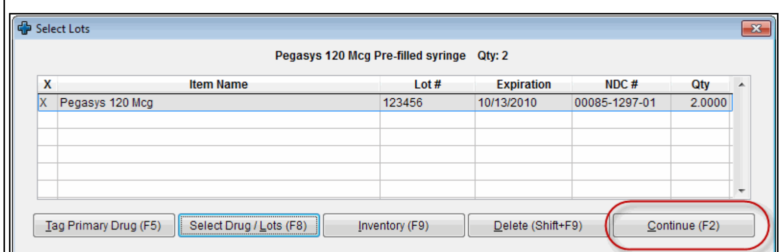
CPR+ contains two program options that may affect how this list functions:

- **Pharmacy Option #1 - Use Lot Number Tracking (Y or N)**: If this option is set to no (‘N’), prescriptions will skip this list and move to the *Print Labels / Documentation list*. In addition, this list will be labeled *Select Lots / Fill Rx (NA)*.
- **Enterprise Option #17 - Fill non lot tracked Rx’s in the Print Labels Document list?:** If this option is set to yes (‘Y’) (and Pharmacy Program Option #1 is set to yes), non-lot tracked prescriptions will skip this list and will be filled while in the *Print Labels / Documentation* list.

Working the Scenario

Based on our scenario, the goal is to select the lots for the drugs on the order and fill the prescription.

Step	Action
1	Select the order in the list.
2	Click the **Select Lots (Enter)** button to view the “Select Lots” window.

Step	Action
3	Click the **Select Drug / Lots (F8)** button to view the Select Lot window. 
4	**CPR+** selects the lot # that works best for the current inventory. The user can manually override the selection by adjusting the quantities in the **Qty Needed** column. The selection made by CPR+ is based on the Lot that has the expiration date that is closest to today's date and will be shown first in the list.
5	Click the **Select (Enter)** button to lock in the lot numbers.
5	Click the **Continue (F2)** button on the Select Lots window. 
6	**CPR+** displays a prompt regarding filling the Rx. Click the **Yes** button.
7	Repeat the steps above for the second order for the scenario.

By following the above steps, the following will happen:

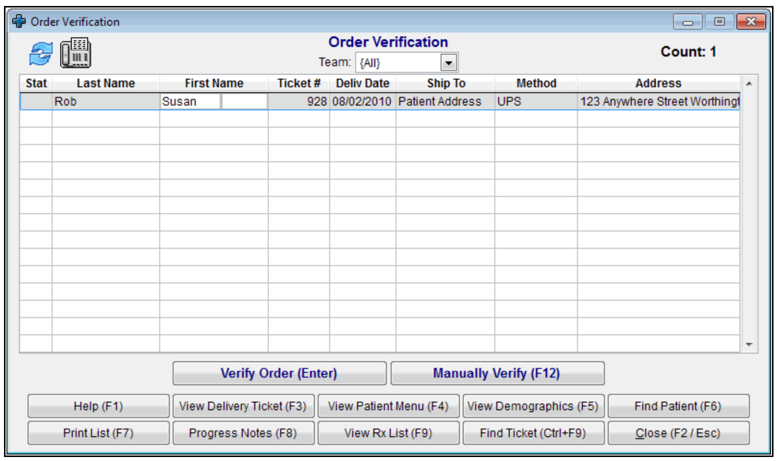
- The orders are moved to the *Patient to Contact - Refills* list (when refills are available) or the *Rx Expiration / Zero Refills* list (when there are no refills available).
- The order is moved to the *Order Verification* list and the Delivery Ticket is moved to the *Delivery Ticket Confirmation Manager*.

Order Verification

This list is used to reduce human error in filling prescriptions and dispensing supplies to your patients, improve inventory accuracy and save money on voided fills and wasted supplies.

To use the functionality, a wedge scanner is recommended and CPR+ must be configured to print a barcode on your pharmacy work orders, delivery tickets, or both, and have barcodes loaded into your inventory.

To access this list, select **Order Verification** and click the **Select (Enter)** button. (*The "Order Verification" window appears.*)



Working the Scenario

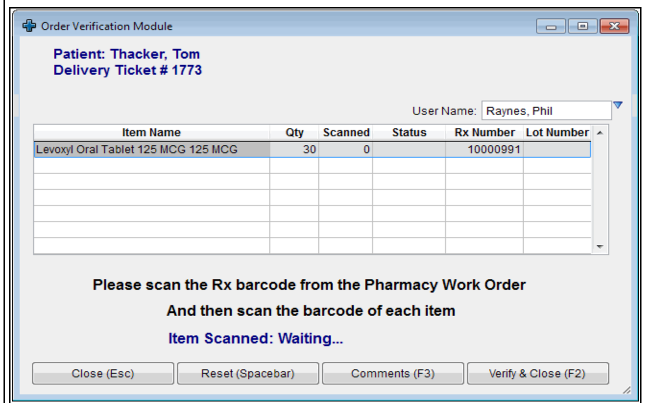
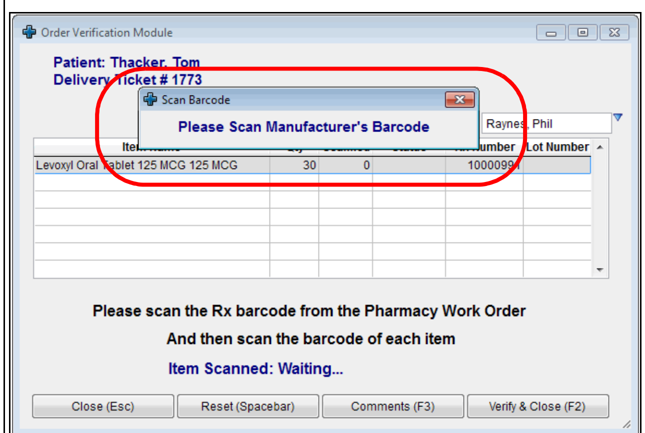
There are two ways to verify the patient's tickets:

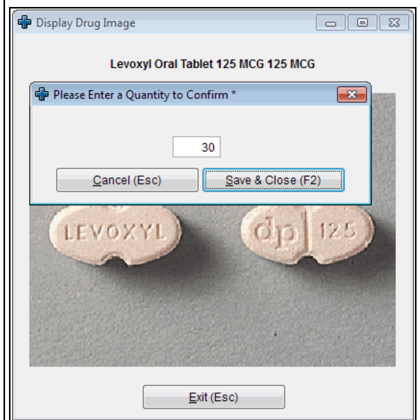
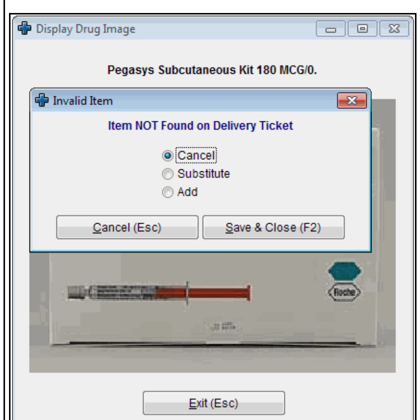
- The user would use a barcode scanner and scan the barcodes by clicking the **Verify Order (Enter)** button.
- The user can manual check the ordered items and then click the **Manually Verify (F12)** button.

Verifying Delivery Tickets Using a Scanner

Follow the steps below when using a wedge scanner.

For accurate scanning, make sure that the Symbol Wedge Scanner is configured before using the *Order Verification* list. If your scanner is not configured, you can locate the Symbol Configuration step-by-step in the CPR+ On-Demand Training System within the CPR+ Documentation category, or contact Customer Support.

Step	Action
1	Scan the bar code on the original Delivery Ticket. This displays a window with the patient's order information. 
2	The user will then scan the barcode on the left side of the work order. CPR+ will then prompt the user to scan the manufacturer's barcode for each item on the order. 
3a	Scan the manufacture barcode. • If the barcode is found, go to step 3b. • If the barcode is not found or there is an incorrect quantity, go to step 3c.

Step	Action
3b	If the barcode is found, CPR+ prompts for the quantity to confirm. Enter the quantity and then click **Save & Close (F2)**.  Go to step 4.
3c	If an item is not on the Delivery Ticket, CPR+ prompts the user for an action: • Cancel the item • Substitute the item for another item on the work order • Add the item to the work order.  Any changes made to the Delivery Ticket will not only be tracked in the Exception Log, but will actually change the ticket, which can then be reprinted with the correct items. Comments can be logged when scanning is complete by clicking **Comments (F3)** on the "Order Verification" window. Note, it is important to remember this will <u>NOT</u> update the Prescription Dispensed log or lot logs.
4	Return to step 3a to verify the remaining items on the Delivery Ticket; otherwise proceed to step 5.

Step	Action
5	After verifying the order, click **Verify & Close (F2)** and the Delivery Ticket is removed from the *Order Verification* list. If any changes were made, CPR+ will prompt the user to reprint the Delivery Ticket.

Verifying Delivery Tickets Manually

Follow the steps below to manually verify the patient's order.

Step	Action
1	If changes are required, view the ticket by clicking **View Delivery Tickets (F3)** and make the corrections; otherwise, proceed to step 2.
2	If the items on the Delivery Ticket are correct, click the **Manually Verify (F12)** button on the Order Verification window.
3	Click the **Yes** button on the Verify Order prompt to removed from the *Order Verification* list.

Order Verification Exceptions Report

To track any discrepancies, run the Order Verification Exceptions report. From the Main Menu, go to **Reports (4) > Clinical Reports (1) > Order Verification Exceptions**.

Select a date range for the report (possibly every day!) and select to see comments or not. Prescriptions and Delivery Tickets are grouped together. All information about the exceptions, including the user who did the verification and the actions taken, are listed on the report.

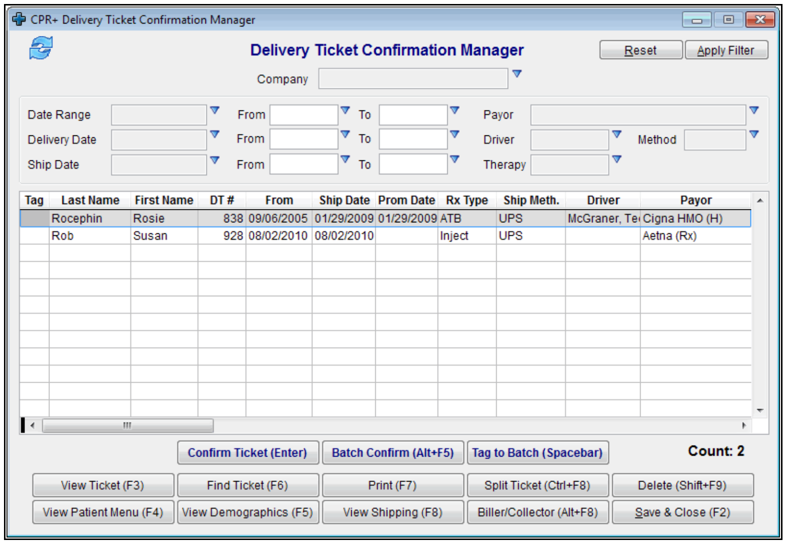
This report only shows exceptions.

Delivery Ticket Confirmation Manager

At this point in the process, Delivery Tickets that were verified move to this list and the following can happen:

- A tracking number can be assigned to the ticket.
- The ticket can be marked for manual shipment.
- The ticket can be cancelled.

To access this list, select **Delivery Ticket Confirmation Manager** and click the **Select (Enter)** button. (*The "Delivery Ticket Confirmation Manager" window* *appears.*)



Assigning a Tracking Number

Assigning tracking numbers is accomplished by using the UPS Worldship software or FedEx software and interfacing it with the **CPR+** SQL Database. When creating a shipment using these software packages, a tracking number is linked to the Delivery Ticket number within the database. This will tag the Delivery Ticket for batch confirmation.

Marking the Order for Manual Shipment

In addition to using the UPS or FedEx software, a CPR+ user can mark the Delivery Ticket as manually shipped by selecting an order in the list, and clicking the **Manual Shipment (F9)** button. Click the **OK** button to remove the ticket from this list.

Cancelling the Order

If the order is no longer required by the patient, the ticket can be cancelled. To do this, simply select a ticket in the list and click the **Cancel Shipment (Ctrl+F9)** button. The Cancel Delivery prompt is displayed and the user clicks the **Yes** button.

When cancelling a ticket, **CPR+** removes the link between the ticket and the invoice, but the user must manually void the fill and adjust the revenue.

Delivery Ticket Confirmation

At the time of confirmation:

- The supplies pulled directly on to the Delivery Ticket are deducted;
- The pending revenue is accepted (MDC is converted to INV);
- The patient co-pay invoice is created;
- Any unapplied cash is applied to the patient invoice;

- If there's major medical, the ticket will be located in the Ready-To-Bill Orders Manager.

Patients to Contact - Refills

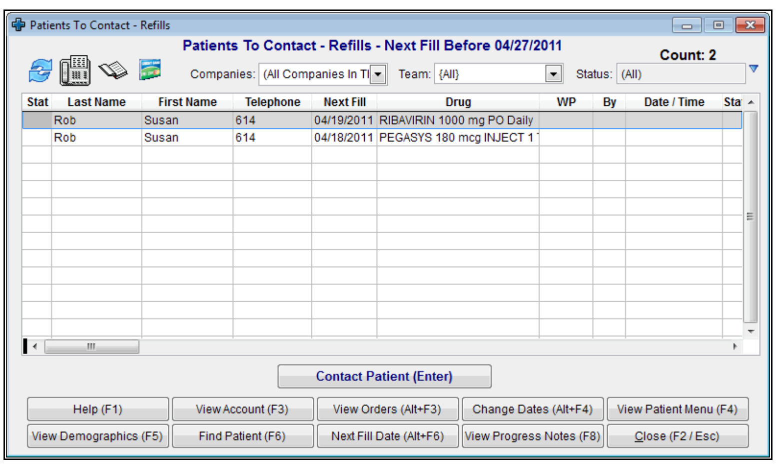
Any order in the **SpRx List Manager** that contains refills for a patient's prescription appears in this list. Based on the scenario used throughout this chapter, we'll assume that a month has passed and it's time to begin the refill process.

The Patients to Contact - Refills list coordinates subsequent deliveries and shows:

- The patients to contact;
- Schedule a delivery;
- Verify the delivery address.

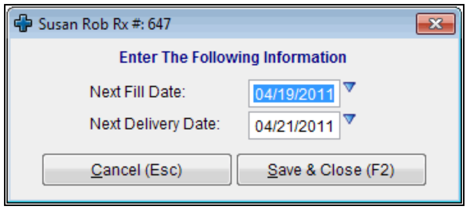
This list is similar to the **Patients to Contact – New Rx's** list except the prescription was filled at least one time unless it is an authorized refill. There is a program setting (#2 on the Enterprise tab) where an organization can determine the number of days in the future when a refill appears in this list.

To access this list, select **Patient To Contact - Refills** and then click the **Select (Enter)** button. (*The "Patients To Contact - Refills" window appears.*)



If a patient is highlighted in yellow, the prescription is due to expire within so many days as defined in the Enterprise Program Options setting #15.

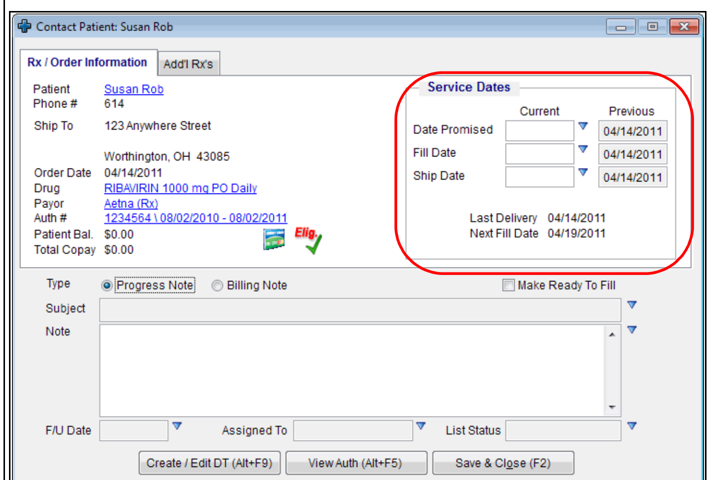
To adjust the next fill date for the refill, select a patient in the grid and click **Next Fill Date (Alt+F6)**. CPR+ displays a prompt where the user can update both the *Next Fill Date* and *Next Delivery Date*.



Working the Scenario

With our scenario, there are refills available for both orders.

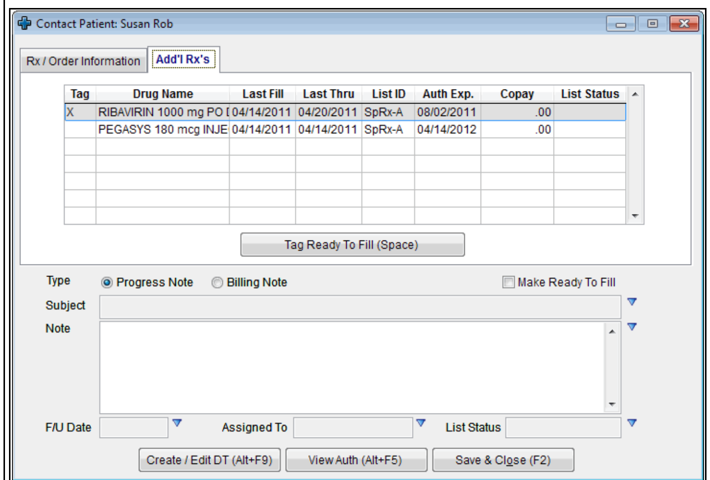
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Select the order in the list.</td></tr>
<tr><td>2</td><td>Click the Contact Patient (Enter) button.</td></tr>
<tr><td>3</td><td>Update the Service dates on the Contact Patient window.



The co-pay on the Contact Patient window will be the sum of all orders tagged on Add'l Rx's tab.</td></tr>
<tr><td>4</td><td>The user can use the List Status drop down to identify the status of contacting the patient. A status could be "Left Message" or "Will Call Back" and these are defined by going to Databases (7) > Popup Windows (7) and selecting Enterprise List Status from the Select Popup list. The defined statues must be no longer than 15 characters.

Any selection made on the Contact Patient window will appear in the Status column for an order found on several of the SPRX List Manager windows.</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5</td><td>If the patient has two or more orders, the user can click the Add'l Rx's tab and link these orders. While on the Add'l Rx's tab, press the <Spacebar> key for each selected order that the user wants to link. This places an 'X' in the <i>Tag</i> column.



The user can only tag orders that are on the same list that are not flagged to require an authorization. Once tagged and linked, these orders will go through the remainder of the SPRX process flow together.</td></tr>
<tr><td>6</td><td>Click the Create / Edit DT (Alt+F9) button to open the Delivery Ticket window.</td></tr>
<tr><td>7</td><td>Click the Delivery Ticket Items tab to adjust quantities and delete or add inventory items / supplies for this refill.</td></tr>
<tr><td>8</td><td>Click the Save & Close (F2) button to save the Working Delivery Ticket.</td></tr>
<tr><td>9</td><td>While on the Contact Patient window, check the Make Ready to Fill box. (This checkbox is not active when an authorization has expired.)</td></tr>
<tr><td>10</td><td>Click the Save & Close (F2) button.</td></tr>
</table>

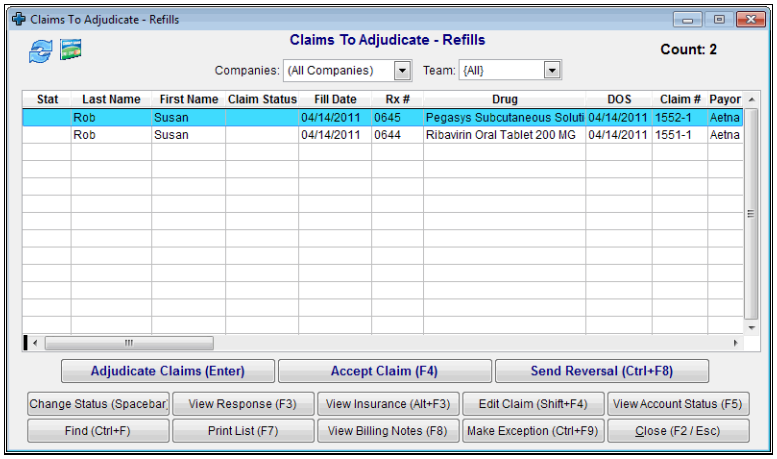
CPR+ marks the order ready, closes the window, and moves the order off this list. When the patient has an NCPDP payor assigned, the order moves to the *Claims to Adjudicate - Refills* list; otherwise, the order moves to the *Print Labels / Documentation* list.

Claims to Adjudicate - Refills

This list is automatically populated with prescriptions that were refilled and have an NCPDP payor assigned. From this list, the user can edit the pharmacy claim and transmit the claim to the Insurance Company.

To access this section, select **Claims to Adjudicate - Refills** and click the **Select**

(Enter) button. (*The "Claims to Adjudicate" window appears.*)



At this point, the order is moved through the following lists during a refill:

- Print Labels / Documentation;
- Select Lots / Fill Rx;
- Order Verification.

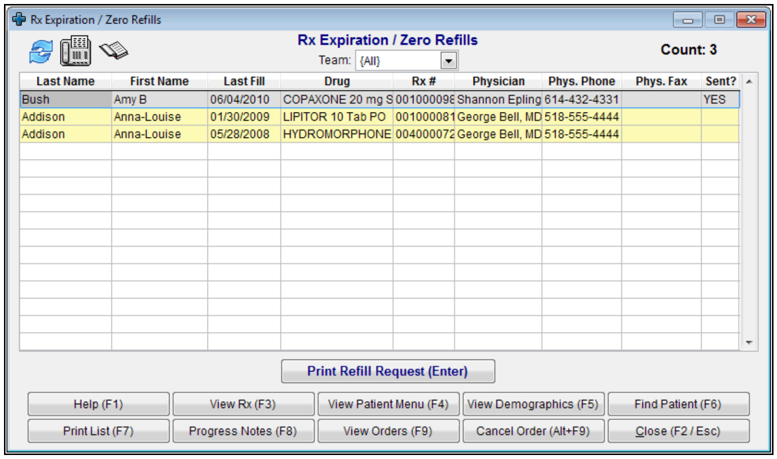
Finally, the order will move to the *Rx Expiration / Zero Refills* list when there are no more refills or doses available for the patient.

Rx Expiration / Zero Refills

This list is populated by orders that:

- Were filled and have no additional refills or doses remaining;
- An Rx is close to expiring or has expired.

To access this section, select **Rx Expiration / Zero Refills** and click the **Select (Enter)** button. (*The "Rx Expiration / Zero Refills" window appears.*)



With the Enterprise Program Option #15 set, prescriptions close to expiring will appear in this list highlighted in yellow. Prescriptions with zero refills in this list will not be highlighted.

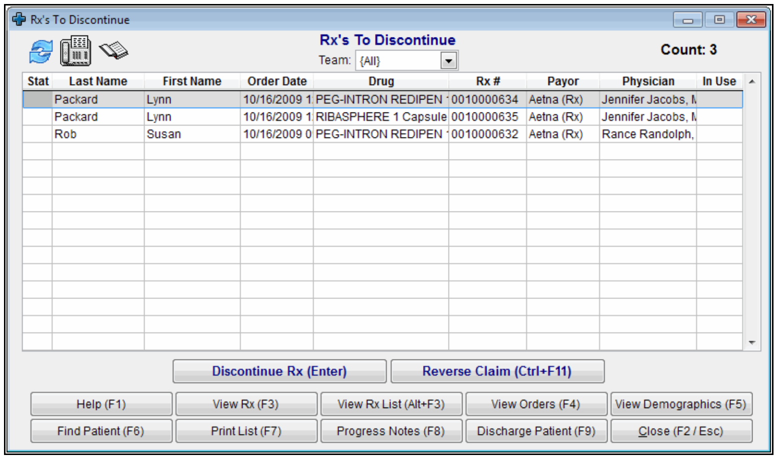
While on this window, the assigned user or team to this list can do the following:

- Create a refill request by selecting an order in the list and clicking the **Print Refill Fax (Enter)** button.
- Cancel an order.
  - — An order can be removed from the patient's order list automatically when the corresponding prescription is cancelled from this window.
  - — If there are more than two prescriptions attached to an order, then the corresponding order is not deleted when only one of the prescriptions is cancelled.

Rx's to Discontinue

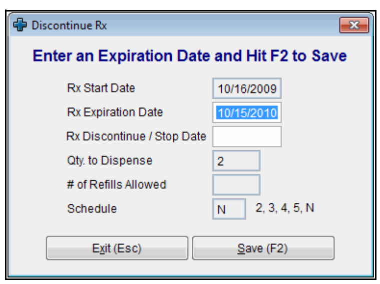
Any orders that appear on this list can be cancelled or discontinued.

To access this section, select **Rx's To Discontinue** and click the **Select (Enter)** button. (*The "Rx's To Discontinue" window appears.*)



While on this window, the assigned user or team can do the following:

- If a claim is linked prescription that needs to be discontinued, select the prescription in the list and click the **Reverse Claim (Ctrl+F11)** button. Click the **Yes** button on the “Rx’s to Discontinue” prompt and follow the on-screen instructions.
- If a claim is not associated with a prescription, select a prescription in the list and click the **Discontinue Rx (Enter)** button. After completing the fields on the “Discontinue Rx” window, click the **Save (F2)** button and enter a reason for discontinuing the prescription.



Other Enterprise SpRx Lists

There are three lists in the **SpRx List Manager** that fall outside of our given scenario:

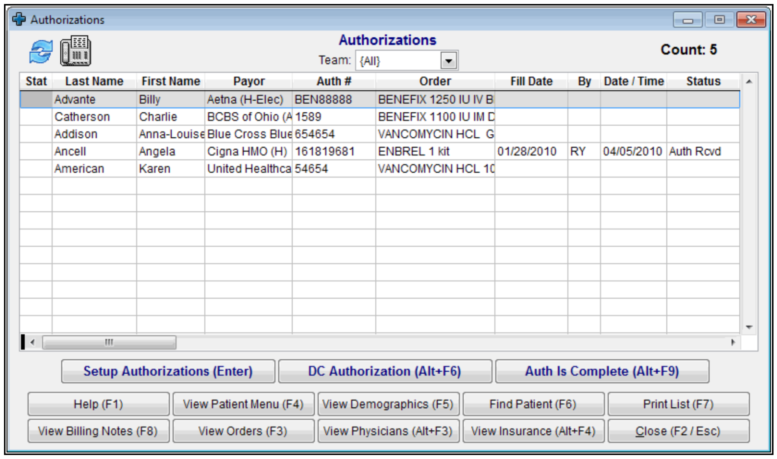
- Authorizations;
- Clinical Follow Up;
- Billing Follow Up.

The following sections explain the purpose of each of these lists.

Authorizations

This list is used to assign an authorization to an order if one is required or an existing authorization has expired.

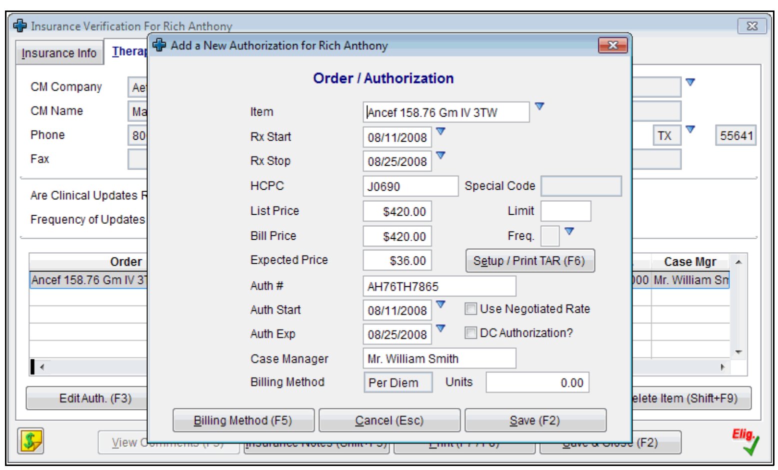
To access this list, select **Authorizations** and click the **Select (Enter)** button. (*The "Authorizations" window appears.*)



If an authorization is needed and not completed, the *Make Ready to Fill* checkbox on the "Contact Patient" window is not active.

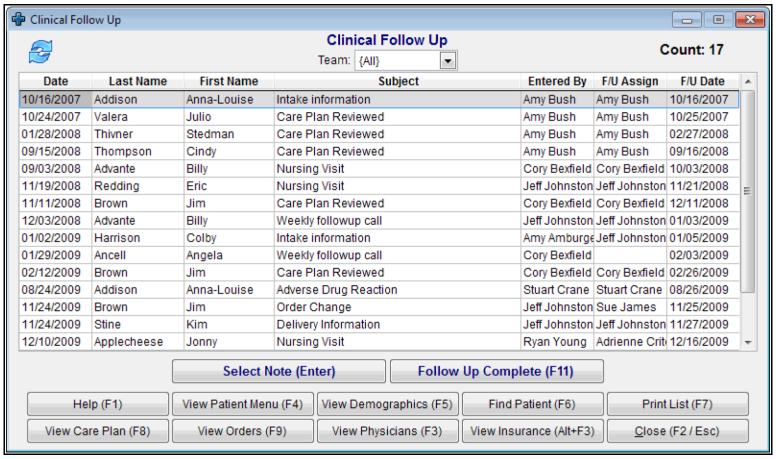
There are three Primary Buttons for this list:

- **Setup Authorization (Enter)** – This button is used to access and edit the authorization (and Insurance Verification) information.



- **DC Authorization (Alt+F6)** – This button is used to discontinue (DC) an authorization.
- **Auth Is Complete (Alt+F9)** – This button is used to complete the authorization and move the order to the next list.

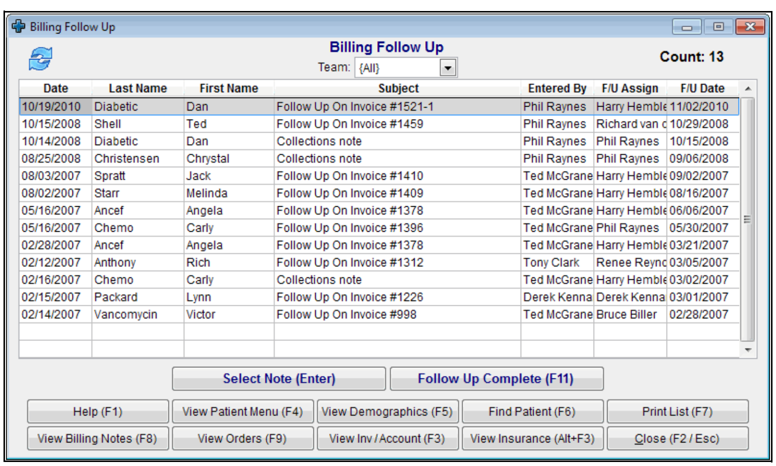
Clinical Follow Up This list displays those patients with Progress Notes that need to be checked. To access this list, select **Clinical Follow Up** and click the **Select (Enter)** button. (*The "Clinical Follow Up" window appears.*)



While on this window, the assigned user or team can do the following:

- Select a follow up in the list and click the **Select Note (Enter)** button. (*The "Progress Notes" window for the patient is displayed.*) The user can review, make changes or add new notes as needed.
- If the follow up for the patient is complete, select the patient in the list and click the **Follow Up Complete (F11)** button. The patient's follow up is removed from the list.

Billing Follow Up Similar to the Clinical Follow Up, this list refers to those billing and collection issues that need to be checked. To access this list, select **Billing Follow Up** and click the **Select (Enter)** button. (*The "Billing Follow Up" window appears.*)



While on this window, the assigned user or team can do the following:

- Select a follow up in the list and click the **Select Note (Enter)** button. (*The "Billing/Collection Notes" window for the patient is displayed.*) The user can review, make changes or add new notes as needed.
- If the follow up for the patient is complete, select the patient in the list and click the **Follow Up Complete (F11)** button. The patient's follow up is removed from the list.