

Intelligent Medical Software

Prescription Setup User Guide

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Introduction

With the Prescription module, you can create prescriptions in IMS and prescribe drugs to patients. IMS has an extensive drug database provided by First DataBank.

Overview: The Drug Screen

On the **Drug** screen, you can register a drug and specify other details related to the drug, such as its product ID, National Drug Code (NDC), and drug schedule.

To access the **Drug** screen, click **Setup** on the IMS menu bar, and then click **Prescription**. When the **Setup Center** window opens, double-click **Drug** in the left pane.







Detailed View: Left Pane

In the left pane of the **Drug** screen, you can enter the necessary details about the drug. The left pane is further divided into five sections.

Upper Section. In the upper section of the left pane, you can see the following:

- Active. The Active check box is selected by default, but you may clear this check box if you want to deactivate the drug.
- **Product ID**. In the **Product ID** box, you can see the product identification number of the drug.

General Section. In the **General** section, you can see the general information about the drug.

For: Provider 🗸	Drug" (?)			
Category:	V Type:	~	NDC:	
Strength:	📑 Unit	V	CD/SI:	v
Strength Value:	RxNorm:		Brand Type:	v
		Compou	nd Dose Form:	v

Figure 2 The General section of the Drug screen

In General, enter the applicable information in the following:

- For. From the For list, select any of the following:
 - **Provider**. Select **Provider** if the drug is prescribed by the provider.
 - **Dispense**. Select **Dispense** if the drug is given to patients through your inhouse pharmacy using the Drug module in IMS.





- **Both**. Select **Both** if the drug is prescribed by the provider and given to the patients through your in-house pharmacy.
- **Drug**. In the **Drug** box, type the name of the applicable drug.

You can also click the red question mark 🕅 to search for and select a drug.

- **Category**. From the **Category** list, select the applicable drug category.
- **Type**. From the **Type** list, select the applicable drug type.

The Type list appears dimmed if you select Provider from the For list.

• NDC. In the NDC box, type the applicable National Drug Code (NDC).

NDC appears dimmed if you select Provider from the For list.

- **Strength**. In the **Strength** box, type the applicable NDC strength of the drug.
- NDC Qualifier Mapping. Click the NDC Qualifier Mapping symbol beside the Strength box to select the NDC qualifier and strength applicable to the drug.
 For more information about NDC qualifiers, see Add an NDC qualifier.
- Unit. From the Unit list, select the applicable NDC unit.
- **CD/SI**. From the **CD/SI** list, select either **Compound** or **Supply Item**, depending on the option applicable to the drug.
- Strength Value. In the Strength Value box, type the numerical value for the drug's strength.
- **RxNorm**. In the **RxNorm** box, type the US-specific terminology applicable to the drug.





- **Brand Type**. From the **Brand Type** list, select the applicable brand type of the drug.
- **Compound Dose Form**. From the **Compound Dose Form** list, select the applicable dosage form of the compound drug.

Controlled Substance Detail Section. In the controlled substance detail section, you can see the information about controlled substances. When you select **Provider** from the **For** list, most of the boxes in the controlled substance detail section appear dimmed, except for the **Schedule** list.

Color:		Shape:	Flavor	:
Drug Imprint:		Schedule: Non-	Contro 🧹 Manufacturer	:
Figur	e 3 The Cont	trolled Substance	Detail section of t	he Drug screen

In the controlled substance detail section, enter the applicable information in the following:

- Color. In the Color box, type the color of the drug.
- Shape. In the Shape box, type an accurate description of the drug's shape. This may not be applicable to drugs in liquid form.
- Flavor. In the Flavor box, type a short description of the drug's flavor.
- Drug Imprint. In the Drug Imprint box, type the applicable drug imprint.
- Schedule. From the Schedule list, select the applicable drug schedule of the drug.
- Manufacturer. In the Manufacturer box, type the manufacturer's name.





Price/Qty./CPT Section. If you select **Provider** from the **For** list, most of the boxes in the **Price/Qty./CPT** section appear dimmed, except for the **Rx/Bottle Qty** box.

- Pric	e/Qty./CPT: —					
	AWP: .00	÷	Purchase:	.00 🜩	CPT (?)	¥
Rx/B	ottle Qty.*	ŧ	Loose tablets: 📃			
	Figure 4 The	e Price	/Qty./CPT se	ection of	the Drug screen	

In the **Price/Qty./CPT** section, enter the applicable information in the following:

- AWP. In the AWP box, enter the applicable average wholesale price of the drug.
- **Purchase**. In the **Purchase** box, enter the applicable purchase price of the drug.
- **CPT**. In the **CPT** box, enter the CPT code that is linked to the drug. When the drug is dispensed to the patient, a charge is filed for the drug. You can also click the red question mark ⁽²⁾ beside **CPT** to search for and select the CPT code from the database.
- **Rx/Bottle Qty**. In the **Rx/Bottle Qty** box, enter the number of pills generally prescribed to the patient at a time.
- Loose Tablets. Select the Loose Tablets check box to dispense the drug with varying quantities.

Other Section. If you select **Provider** from the **For** list, most of the boxes in the **Other** section appear dimmed, except the **Pharmacy** list and **Note** box.



			8	IMS [®]	Intelligent Medical
					Software
Other:					
Pharmacy (?)	¥	Preferred Vendor (?)	~		
Caution 1:		Caution 2:			
Note:					
Figure	5 The Other section of	f the Drug screen			

In the **Other** section, enter the necessary information in the following:

- Pharmacy. From the Pharmacy list, select the name of the applicable pharmacy.
 You can also click the red question mark ^[7] beside Pharmacy to search for and select the pharmacy.
- Preferred Vendor. From the Preferred Vendor list, select the name of your preferred vendor. You can also click the red question mark ^(?) beside Preferred Vendor to search for and select the vendor.
- **Caution 1** and **Caution 2**. In the **Caution 1** and **Caution 2** boxes, type the relevant warnings about the drug's side effects.
- Note. In the Note box, type additional notes, if necessary.

Detailed View: Right Pane

In the right pane of the **Drug** screen, you can access the following functionalities:

• Dispense NDC(s). Click the Dispense NDC(s) symbol ³² to link a Provider drug to a Dispense drug. This option is only available if you select Provider from the For list. If you select Dispense from For, the label changes to Provider Drug.





Ingredient(s). Click the Ingredient(s) symbol symbol to open the Compound
 Ingredient(s) window. In Compound Ingredient(s), you can enter the applicable information of the drug ingredient.

Note:

You can click the **Ingredient(s)** symbol symbol when you select **Compound** from the **CD/SO** list.

In the lower pane of the window, click **Add Ingredient(s) from Drug** to add an ingredient from the drug database.

Note:

If you select **Supply Item** from the **CD/SI** list or change the drug and ingredients that are linked with the drug, the "There are compound ingredients linked to this drug. Changing the CD/SI value will remove all the linked ingredients with this drug. Do you want to continue?" message appears.

1		Co	mpound Ingredie	ent(s)					? •
	Ingredient Description*	Strength Value	Strength Form	Strength Unit		Schedule	Q17	Unit	1
1	orean base no.189	1566	Creani v	Day	¥	Non-Confic 👳	ŭ (;	H.	> >
>					-		1.4	H	
						Ø Add	F11 - Add B	ow F12-0	Debte Row

Figure 6 The Compound Ingredient(s) window





- Lot No. Click the Lot. No. symbol ¹ to enter the initial quantities of the drug. You can also enter new lot numbers in relation to the Drug Purchase functionality to record new drugs. This option is available only if you select Dispense from the For list.
- CPT. Click the CPT symbol to set a CPT code for the drug based on the insurance. You can also set the quantity and fee per insurance carrier or plan. This feature also allows you to bill out different codes, quantities, or prices to different insurances.
- Inventory. Click the Inventory symbol ¹ to view and print the transactions related to the drug.
- Instruction. Click the Instruction symbol <a>drug for selected insurance carriers.
- Link With. Click the Link With symbol 🔯 to access the Link With feature in the Visit Note module.

Prescription Setup

To use the Prescription module, it is necessary to perform the setup procedures in IMS.

Set up drug categories and drug schedules

To properly identify and categorize the drugs or medications listed in the system, you need to set up drug categories and drug schedules.





Set up Drug Categories. To set up drug categories, follow these steps:

- 1. On the menu bar, click **Setup**, and then click **Prescription**.
- 2. When the Setup Center window opens, double-click Drug Category.



3. When the **Drug Category** window opens, click **Add**, and then type the description of the new entry.

Note:

If you want to delete a selected entry, click an entry, and then **Delete**. When the message "Are you sure you want to delete this row?" appears, click **Yes**.

4. Click Save, and then click Close.





Assign Text Color. When you add a drug in a prescription, the color of the font indicates the drug schedule. You can assign specific colors to drug schedules in the Drug Schedule window.

To assign a text color to a drug schedule follow these steps:

- 1. On the menu bar, click **Setup**, and then click **Prescription**.
- 2. In the left pane of the Setup Center window opens, double-click Drug Schedule.



- 3. In the Drug Schedule window, select a drug schedule, and then click Color.
- 4. In the **Color** window, select a color you want to assign to the drug schedule, and then click **OK**.
- 5. In the **Drug Schedule** window, click **Ok**.

Note:

These colors will show for the drugs that appear in the **Prescription** window; they allow providers to quickly identify scheduled or controlled drugs.





Sort and Display Drugs. To sort drugs and display those by category in **Visit Note**, follow these steps:

- 1. On the menu bar, click **Setup**, and then click **User Parameters**.
- 2. In the left pane of the **Parameters** window, click **Prescription**.
- 3. In the right pane, select any of the following option from the **Show prescription list grouped by** list:
- **Drug Class**. Select **Drug Class** if you want the prescription list to be grouped according to drug class.
- **Provider**. Select **Provider** if you want the prescription list to be grouped according to the last approving provider.
- **Date**. Select **Date** if you want the prescription list to be grouped according to the last approved date.
- None. Select None if you do not want the prescription list to be grouped.





*	Parameters		?	×
Billing			📁 <u>F</u> ilter 🖉 Cle	ar
∰r Visit Note ∰r Visit Note Template	Parameter	Value		~
Schedule/Check In-Out	OTC drugs should be in prescription instead of current medication for same day	No		
Prescription Scanner	Open prescription screen if the prescription(s) are added from link with option.	Yes 🗸		
👾 Scanner	Perform formulary check while adding current medication	Yes 🗸		
💮 🖗 Immunotherapy	Prescription Saving	PDR		
🤐 🏶 Other	Search anywhere in data for Drug	No 🗸		
	> Show prescription list grouped by	Drug Class	×	
		Drug Class Provider Date		
		None		
				×
Parameter Help				
Choose the option from the p	arameter value to decide the default grouping of	the Prescription	on list.	^
If this parameter is set to Dr	ug Classes, then the prescription list would be gro	ouped by Drug	Classes.	
If this parameter is set to Las Provider in the prescription	st Approved Provider, then the prescription list v n.	vould be groupe	ed by Last Approv	ed
	st Approved Date, then the prescription list would	l be grouped by	prescription's L	ast
Approved Date.			Activate	Wind
🔀 System Parameters 📋 Copy	System Parameters To Other User		💾 Save 🛛 🐼 Cl	osein c
Figure 9 In the	right nane of the Parameters wind	tow soloct	t the applical	

Figure 9 In the right pane of the **Parameters** window, select the applicable option from the **Value** list of the **Show prescription list grouped by** parameter.

4. Click Save, and then click Close.

Register a drug

If a drug is properly registered, you can access the drug throughout the system. This makes drug dispensing activities more convenient.





To register a new drug, follow these steps:

- 1. On the menu bar, click **Setup**, and then click **Prescription**.
- 2. In the left pane of the **Setup Center** window, double-click **Drug**.
- 3. In the left pane of the **Drug** screen, enter the necessary details.

To know more about the boxes and lists in the left pane of the **Drug** screen, see *Detailed View: Left Pane*.

4. On the action toolbar, click the **Save** symbol 💾.

Note:

The National Drug Code (NDC) of discontinued drugs can be reassigned to another drug. On the **Drug** screen, when you register the drug that has the reassigned NDC, make sure that the drug details are similar with the details in the First DataBank (FDB) drug database. Otherwise, the "This NDC has been reassigned to some other Drug/Product." note appears for the drug, and you cannot prescribe the drug in the Prescription module.

Add an NDC qualifier

When processing professional claims, it is important to document the NDCs and other relevant information when drugs are billed.

Add NDC Qualifier. To add an NDC qualifier, follow these steps:

- 1. On the menu bar, click **Setup**, and then click **Prescription**.
- 2. In the left pane of the Setup Center window, click NDC Qualifier Mapping.





6	NDC Qualifie	er Mapping 🛛 ? 🛛 🗙
	NDC Qualifier	NDC Strength
>	F2 - International Unit	F2
2.	GR - Gram 🗸 🗸	Grams
3.	ME - Milligram 🗸 🗸	mg
4.	ML - Milliliter 🗸 🗸	Mililiter
5.	UN - Unit 🗸	Unit
Q	🕈 Add 🌓 Delete	💾 Save 🐼 Close

Figure 10 In the NDC Qualifier Mapping window, select the applicable unit of measure.

- 3. In the lower pane of the NDC Qualifier Mapping window, click Add.
- 4. Enter the necessary information under the following column headings:
- NDC Qualifier. In NDC Qualifier, select the applicable unit of measure. The options are the following:
 - **F2 International Unit**. This is an international unit that is usually used for Factor VIII Antihemophilic Factor.
 - **GR Gram**. This is generally used for ointments, creams, inhalers, or bulk powders in a jar.
 - ML Milliliter. This is used if a drug comes in a vial in liquid form.
 - UN Unit. This is used if a drug comes in a vial in powder form and has to be reconstituted.
 - ME Milligram. This is used if an ointment, cream, inhaler, or bulk powder in a jar are dispensed. This unit of measure is primarily used in the retail pharmacy setting and not for physician-administered drug billing.
- NDC Strength. In NDC Strength, type the applicable NDC strength.





5. Click Save, and then click Close.

Set up signa

Signa is the code that providers use to write instructions on how patients should take prescribed medications. You can add new or customize existing signa (SIG) that providers use when they write prescriptions. The SIG and interpretation will appear on the patient's prescription.

Add New SIG. To add a new SIG, follow these steps:

1. On the menu bar, click **Setup**, and then click **Prescription**.

2. In	he left pane	of the Setur	Center window,	double-click SIG.
-------	--------------	--------------	-----------------------	-------------------

D	Annania Mina X (17)	SIG*	Maraiaa	Naaa	Euroine	Mi-La	Dava	C N.	- /
	escription* (?)		Morning	Noon	Evening	Night		Seq.No.	- '
1. <u>In</u>	hale 1 to 2 puffs every 4-6 hours a	12PQ46PR	.00 🜲	.00 🜩	.00	.00 🜩	¥	÷	
2 . Ini	hale 1 puff twice a day	1PBID	.00 🜲	.00 🜲	.00 🜲	.00 🜲	×	÷	
3 . Ini	hale 1 puff every 4-6 hours as nee	1PQ46PR	.00	.00 🜲	.00	.00 🜲	¥	÷	
4. Ini	hale 1 puff daily	1PQD	.00	.00 🜲	.00	.00 🜲	¥	÷	
5. Ini	hale 1 puff three times a day	1PT	.00	.00 🜲	.00	.00 🜲	¥	÷	
6 . Ta	ake 1 twice daily	1TBID	1.00	.00 🜲	1.00	.00 🜲	¥	+	
7. Ta	ake 1 daily	1TD	1.00	.00 🜲	.00	.00 🜲	¥	÷	
8 . Ta	ake 1 at bedtime	1THS	.00	.00 🜲	.00	1.00 🜲	¥	÷	
9 . Ta	ake 1 four times a day	1TQ	1.00	1.00 🌲	1.00	1.00 🜲	¥	÷	
10 . Ta	ake 1 every 4-6 hours	1TQ46	6.00 🜲	.00 🜲	.00	.00 🜲	¥	+	
11. Ta	ake 1 every 4-6 hours as needed f	1TQ46PP	6.00	.00 🜲	.00	.00 🜲	¥	÷	
12 . Ta	ake 1 every 6-8 hours	1TQ68	4.00	.00 🜲	.00	.00	×	-	
13 . Ta	ake 1 every other day	1TQOD	.50 🜲	.00 🜲	.00	.00 🜲	×	-	
14. Ta	ake 1 three times a day	1TT	1.00 🜲	1.00 🜲	1.00	.00 🜲	¥	-	
15 . Ta	ake 1 teaspoonful every 4-6 hours	1ZQ46	.00	.00 🜲	.00	.00 🜲	¥	÷	
				_	🗗 Add	🖨 De	elete 💾 Save	🙆 Close	,

Figure 11 In the SIG window, enter necessary information under the column headings





- 3. In the lower pane of the SIG window, click Add.
- 4. Enter the necessary information under the following column headings:
- **Description**. In **Description**, type the words or phrase that you prefer to use. You can also click the red question mark (2) to search for and select SIG phrases from the database.
- SIG. In SIG, enter the applicable SIG code.
- Morning, Noon, Evening, and Night. In Morning, Noon, Evening, and Night, enter the applicable dosage quantity that the patient should take at a time.
- **Dose**. From the list in **Dose**, select the applicable dose.
- Seq. No. In Seq. No., enter the preferred sequence number.
- 5. Click Save, and then click Close.

Customize the SIG words

If the existing SIG words do not match the instructions that you want, you can add new words in **Setup Center**. This allows you to add SIG words that more accurately fit your practice's needs.

Set up SIG words. To set up the available SIG words, follow these steps:

- 1. On the menu bar, click **Setup**, and then click **Prescription**.
- 2. In the left pane of the Setup Center window, double-click SIG Words.





\$		Word F	lep	ository	?	×
Bepository Template(s)		e r by: olumns v				
		Column*		Value*	Seq. No.	^
	1.	Column 1	¥	Apply	L	
	2.	Column 1	¥	Chew and swallow	÷	
	3.	Column 1	¥	Give	÷	
	4.	Column 1	¥	Inhale	•	
	5.	Column 1	¥	Inject	+	
	6.	Column 1	¥	Insert	+	
	7.	Column 1	¥	Shampoo	+	
	8.	Column 1	¥	Squirt	+	
	9.	Column 1	¥	Take	÷	
	10.	Column 2	\checkmark	1	1	
	11.	Column 2	\checkmark	2	2 🜲	
	12.	Column 2	¥	3	3 🌩	
	13.	Column 2	¥	4	4 🌲	
	14.	Column 2	¥	5	5 🌩	
	15.	Column 2	¥	6	6 🌲	
	16.	Column 2	¥	7	7 🜲	¥
	<	🔊 Add	•	Delete 🗙 Cancel 💾 Save	🔞 Close	

Figure 12 Under SIG in the Word Repository window, enter necessary information under the applicable column headings.

- 3. In the Word Repository window, click Add.
- 4. Enter the necessary information under the following column headings:
- **Column**. From the list in **Column**, select the column where you want instructions to appear in the **Sig Selection** window.
- Value. In Value, type the applicable instructions.
- Seq. No. In Seq. No., enter the sequence number.
- 5. Click Save, and then click Close.





Add a pharmacy

You can register a pharmacy in IMS. By adding the pharmacy, you can select the pharmacy's name when writing prescriptions and current medications.

To add a pharmacy, follow these steps:

- 1. On the menu bar, click **Setup**, and then click **Prescription**.
- 2. In the left pane of the **Setup Center** window, double-click **Pharmacy**.
- 3. In the name box of the **Pharmacy** screen, type the name of the pharmacy.

	New Pharmacy
Na <u>m</u> e*	Active: 🗸
SS. Name:	
Address:	
Street:	
Zip (?)	Verify Address
P <u>h</u> one #:	Fax #: 340B Support:
NPI:	Find
NCPDP Id (?)	~
Note:	

- 4. Enter the applicable address and contact details.
- 5. On the action toolbar, click the **Save** symbol 🗎.





Note:

You can add a pharmacy directly from the **Prescription** screen. Click the question mark beside **Pharmacy** to open the **Search Option** window, search for and select the pharmacy, and then click **Add Pharmacy** in the lower pane.

Set up prescription templates

You can use prescription templates to group similar drugs together. When doctors prescribe medications to the patients, the templates can help them access only the applicable drugs, instead of searching for the applicable drug in the entire drug database. The system comes with templates such as **Allergy**, **Respiratory**, etc. that contain drugs that are related to these categories. Within the templates, users can set required details that automatically appear in the patient's prescription.

To set the templates, follow these steps:

- 1. On the menu bar, click **Setup**, and then click **Prescription**.
- 2. In the left pane of the **Setup Center** window, double-click **Template**.





	arch:	De	scription*	-					Seq. No.	÷		Active:		
		-	User:	All					Specialty:					
	Description	1	Note:											
>>]												
2.	SEDATING ANTIHISTAMINES							~ (0)		e		010 (0)		
З.	NON-SEDATING ANTIHISTAMINES	1.	Seq. No	Drug		Dru	g/Drug Group	p* (/)	1/2/28	Strength		SIG (?)		
4.	NASAL SPRAYS			Ulug	~	_			~			~		×
5.	EYE	Cat	egory:			Y	NDC:		CD/SI:	V	Rx Norm:		BT:	Y
6.	SKIN	3	Type:		Y		Dose:	×	Days Supply:	\$	Qty.	.00	Unit:	V
7.	LEUKOTRIENE MODIFIERS (LTM)		Refill:	-	Time(s)	×	Morning:	.00	Noon:	.00 💠	Evening:	.00	Night:	.00 💠
8.	INHALED CORTICOSTEROIDS (ICS)													
9.	ICS / LABA COMBO]												
10.	RESCUE (SABA)	1												
11.	LONG ACTING BETA AGONIST (LAB)	4												
12.	ANTICHOLINERGIC INHALERS	1												
13.	ORAL STEROID	1												
14.	ANTIBIOTIC Tablets	1												
15.	ANTIBIOTIC Suspensions	1												
16.	COUGH	1												
17.	MIGRAINE	1												
18.	GERD	1												
19.	EAR	1												
	EPIPEN	1												

- 3. In the upper pane of the **Prescription Template** screen, enter the applicable information in the following:
- **Description**. In **Description**, type the label you want to assign to the template.
- Seq. No. In Seq. No., enter the preferred sequence number.
- User and Specialty. Click the Select symbol 🗟 beside the User and Specialty boxes to select a user or a specialty in the IMS records.
- Note. In Note, type additional notes if necessary.
- 4. In the lower pane, enter the following information:
- Seq. No. In Seq. No., enter the preferred sequence number for the drug.





- Type. From Type, select either Drug or Group.
- Drug/Drug Group. If you select Drug in Type, you can click the red question mark 2 beside Drug/Drug Group to search for and select a drug from the database. If you select Group in Type, you can type the name of the drug group.
- **Strength**. From **Strength**, select the applicable strength that can be assigned to the drug group. You cannot modify this if you select **Drug** in **Type**.
- SIG. From SIG, select the applicable signa.
- Category. From Category, select an applicable category from the list.
- NDC and CD/SI. In NDC and CD/SI, the details automatically appear depending on the information saved in the drug database.
- **Rx Norm**. In **Rx Norm**, type the US-specific terminology applicable to the drug.

The following details are added to the patient's prescription when the drug is prescribed to a patient:

- SIG Night
- Туре
- Morn

• BT

Noon

Days Sup

Refill

Dose

- Eve Quantity
- Unit •
- 5. On the action toolbar, click the **Save** symbol \blacksquare .





Set default drug values

If you normally prescribe a drug with the same specifications, you can set up default values to automatically appear in the **Drug** details when you create a prescription.

To customize the default values, follow these steps:

- 1. On the menu bar, click **Setup**, and then click **Prescription**.
- 2. In the left pane of the **Setup Center** window, double-click **Default Value**.
- 3. In the Drug list of the Default Value of Prescription window, select the drug that you want to set the default values for. You may also click the red question mark12 to search for and select the drug in the database.
- 4. Enter the other information that you want to apply as default values or directions for the selected drug.

Active: 🗹	New Default Value
Drug* (?) IBUPROFEN 400 MG TABLET	Type: Chronic 💌
Direction: Morning: 1.00 • Eve: .00 • Night: 1.00 • I Tablet(s) every mornafter noon, 1 Tablet(s) Dose: Tablet(s)	ning, 1 Tablet(s) every s) at night
Days Supply: 7 📮 Qty.: 21.00 🚔 Unit: Tablet 💽 R	efills: Time(s) 💌
Note:	×
Figure 15 On the Default Value of Prescrip	otion screen, enter tl

Figure 15 On the **Default Value of Prescription** screen, enter the information that you want to apply as default value.

5. On the action toolbar, click the **Save** symbol 🗎.





Set up the default Rx Fill Indicator value

The RxFill Indicator in the Prescription module determines if the drug is dispensed, partially dispensed, not dispensed, or transferred.

You can set up the default RxFill Indicator value in the user parameters.

To set up the default RxFill Indicator value, follow these steps:

- 1. On the IMS menu bar, click **Setup**, and then click **User Parameters**.
- 2. In the left pane of the **Parameters** window, click **Prescription**.
- 3. From the **Default Rx Fill Indicator Value for e-Prescription (Prescription)** list, select the value that you want to set as the default Rx Fill Indicator.
- 4. Click Save.





•	Parameters			
User Parameters	rx fill		🚺 Filter	<u>a</u>
— ₩ Visit Note — ₩ Visit Note Template	Parameter	Value		
- Schedule/Check In-Out - Berninder & Fax	 Default Bx Fill Indicator value for e-Prescription (Prescription) 	All Fill Statuses	~	
- Prescription				
—∰ Scanner —∰ Email				
—♥ Immunotherapy —♥ Other				
Desc = 'rx fill'				
Parameter Help	to choose the default value of Rx Fill Indicato	r for NowPy Pop	owal Person	160.7
RxChange Response if the Rx	Fill Indicator is not defined in the prescription	n.	enai kespoi	13°C d

Figure 16 From the **Default Rx Fill Indicator Value for e-Prescription (Prescription)** list, select the value that you want to set as the default Rx Fill Indicator, and then click **Save**.

Set up the IMS formulary

The formulary functionality allows users to set up formularies per insurance, dictating which drugs are covered, require authorization, or need special instructions.





To add a formulary, follow these steps:

- 1. On the menu bar, click **Setup**, and then click **Prescription**.
- 2. In the left pane of the **Setup Center** window, double-click **Formulary**.
- 3. In the upper pane of the **Formulary** screen, type the applicable label in the **Description** box.

Desc	sription* Formulary 01		Formulary 1 of 1
	Note:		Insurance
Туре	Drug/Drug Group* (?)	Rule	Note
	IBUPROFEN 400 MG TABLET	▼ Not Covered ▼	j 😽
Drug 💌	MEFENAMIC ACID 250 MG CAPSULE	 Not Covered 	
	action in Note when rule is Sp. Instruction	C10	Drug(s) F11-Add Row F12-Delete Row

Figure 17 In the upper pane of the Formulary screen, type the applicable label in the Description box

- 4. Type additional details in **Note** if necessary.
- 5. In the lower pane, enter the necessary information under the following column headings:





- Type. From Type, select either Drug or Group.
- **Drug/Drug Group**. When you select **Drug** from **Type**, you can also click the red question mark ⁽²⁾ to search for and select a drug from the database. When you select **Group** from **Type**, you can type the name of the drug group.
- Rule. From Rule, select any of the three options: Not Covered, Prior Auth. Req., or Sp. Instructions.
- Note. In Note, type additional notes if necessary.
- Select Alternate Drug(s) symbol. Click the Select Alternate Drug(s) symbol is select an applicable alternate drug or drug group.
- 6. On the action toolbar, click the **Save** symbol 🗎.

Note:

In the upper-right pane of the **Formulary** screen, you can click the **Insurance** symbol is select an insurance plan or carrier that you want to associate with the newly created formulary.

Customize the print layout

IMS has a letter template editor that can help you customize the prescription print layout. The system also has a default layout that you may modify.

To customize the print layout, follow these steps:

- 1. On the menu bar, click **Setup**, and then click **Prescription**.
- 2. In the left pane of the **Setup Center** window, double-click **Print Layout**.





ų į	Prescription Print Layout ? ×
Select: [All] All - All	
	E E I 100% ▼ I I I I I I I Search: . I ³ , I ⁴ , I ⁵
PRESCRI <if:is_d< th=""><th>etterHe ad Image> PTION (Given to the pharmacist) Iuplicate_1 ^ endif> <if:sin ^<="" doctor's="" sln:="" th=""></if:sin></th></if:is_d<>	etterHe ad Image> PTION (Given to the pharmacist) Iuplicate_1 ^ endif> <if:sin ^<="" doctor's="" sln:="" th=""></if:sin>
<if:office_name ^="" endif=""> <if:office_address_2 ^="" endif=""> <if:office_phone ^="" endif=""></if:office_phone></if:office_address_2></if:office_name>	endif> Iast action Iast approved office id Iayout id Office Address Office City
<if:patient_name ^="" endif="" patient:=""> DOB: ^ endif></if:patient_name>	<if:patient_bdate city="" fax<="" office="" state="" td="" zip=""></if:patient_bdate>
DATE: <current_date_udf> ADDRESS: <if.comp_address ^="" endif=""> <if.address_1 ^="" endif=""></if.address_1></if.comp_address></current_date_udf>	TIME: <current time=""> 0ffice Name 0ffice State 0ffice Zip</current>
Section1/1 Page1/2 Line1 Col0 F5: Column List F	NUM 100% - Double click to select field 6: Save as special column F8: Delete special column e Margin New Polete Cancel Save Save As Close
Figure 18 In the Prescription	Print Layout window, customize print layout by

adding information found in the Database Field List.

- 3. In the **Prescription Print Layout** window, click **New** to add a new layout.
- 4. In the **Database Field List** pane, double-click an item whose information you want to add to the text of the document.
- 5. Click Save, and then click Close.

Customize the dispense label layout

If your office also has drugs on stock, it is necessary to label them properly. In IMS, you can customize the dispense labels.





To customize a dispense label, follow these steps:

- 1. On the menu bar, click **Setup**, and then click **Prescription**.
- 2. In the left pane of the **Setup Center** window, double-click **Dispense Label Layout**.

0	Dispense Label Layout	?	×
			^
	Patient Name DOB Sex		-
	Doctor Nam Drug Qty.		
	SIG NDC: NDC Lot #: Lot # Exp. Exp		
	Color Shap Inprint		-
			-
<			>
Right cli column (or set column attributes	× Canc	el

Figure 19 In the **Dispense Label Layout** window, add and delete columns to customize a dispense label. Users can add selected prescription information on the label.

- 3. If you want to add or delete columns or set column attributes, right-click the label and access additional customization.
- 4. Click **Set Default** if you want to set the label that you are creating as the default template.

If you want to further customize the size of the label, click Label Size, and then make the changes in the Label Size window.





5. Click Ok.

Set up text and email notifications

You can set up the text and email notifications that the patients receive.

To set up the text and email notifications, follow these steps:

- 1. On the IMS menu bar, click **Setup**, and then click **Admin**.
- 2. In the left pane of the Setup Center window, select Text/Email Templates.
- 3. In the Text/Email Templates window, click Add.
- 4. In the **Type** column, select either **Text** or **Email** for the type of notification that the patient will receive.
- 5. In the **Category** column, select the purpose of the notification.

For prescription notifications, select any of the following categories:

- **Rx Request**. Select **Rx Request** for notifications on new prescription requests.
- **Rx Status Change**. Select **Rx Status Change** for notifications on the changes of the status of a prescription request.
- 5. In the **Template** column, select the applicable notification template.
- Click the Select Type symbol
 It to select the request type in the Select Type window.
- 7. Click Save.





Note:

You can assign only one of each type of notification to each category.

•			Text/E	ma	il Templates ?	>	<	
	Type* Category*				Template*			
20.	Email	¥	Patient Statement	¥	Format 3 (GENERAL)			
21.	Text	¥	Appointment Reminder	¥	Text_appointment_reminder (Text/Email) 🔽	-»		
22.	Text	¥	Appointment Reminder	¥	Televisit Appointment Reminder (Text/Ema 🔽	1		
23.	Text	¥	Final Appointment Reminder	¥	Text_Final_Appointment_Reminder (Text/E	1		
24.	Text	¥	Missed Appointment Reminder	¥	Text_Missed_Appointment_Reminder (Text	1		
25.	Text	¥	Patient Document	¥	Text_Patient_Document (Text/Email)			
26.	Text	¥	Portal Forms Reminder	¥	Text_Reminder_for_forms_not_filled (Text/			
27.	Text	¥	Birthday Greetings	¥	Text_Birthday_Greetings (OTHER)			
28.	Text	¥	Allergy Shot Reminder	¥	Text_Allergy_Shot_Reminder (Text/Email) 🔽			
29.	Text	¥	First Allergy Shot Reminder	¥	Text_First_Allergy_Shot (Text/Email)			
30.	Text	¥	Final Allergy Shot Reminder	¥	Text_Final_Allergy_Shot_Reminder (Text/E			
31.	Text	¥	Missed Allergy Shot Reminder	¥	Text_Missed_Allergy_Shot (Text/Email) 🛛 🗸			
32.	Text	¥	Portal Appointment Alert	¥	Portal Appointment Alert (Appointment Reg			
33.	Text	V	Patient Notes	¥	Text_patient_note (Text/Email)			
34.	Text	¥	Patient Checkin Alert	¥	Text_Patient_checked_in_alert (OTHER) 🔽			
35.	Text	¥	Reminder	¥	Text_reminder (Text/Email)			
>	Email	~	Reminder	¥	681			
Text li	mit is 16	60 c	haracters, it might send multiple T	ext	accordingly. Text will be sent to patient.		¥	
			Ø	≧	dd 🛛 🍧 <u>D</u> elete 🔡 <u>S</u> ave 🛛 😵 <u>C</u> lo	ose		

Figure 20 The Text/Email Templates window

Set up text and email templates

You can set up the templates for the text and email notifications that you send to the patients.

To set up the text and email templates, follow these steps:

1. On the IMS menu bar, click **Setup**, and then click **Other**.





- 2. In the left pane of the **Setup Center** window, select **Letter Template**.
- 3. On the gold bar of the Letter Template window, select Text/Email from the Type list, and then select the applicable category from the Select list.



*	Letter Template (123)	? ×
Type: Text/Email	🗴 Select 123 (CCDA Export) 🔍 🍞	
Segoe UI Light	 ▼ 12 ▼ B Z U F T T T = 1 100% ▼ T T T T T T T T T T T T T T T T T T	Remove line if no data found Search: presc
	<if:patient_note ^="" endif=""></if:patient_note>	Field List
Section1/1	Page1/1 Line1 Co125 English (United States) 100% Activate Window	VS Double click to select field
Spell Check	F6: Save as special column F7: List Columns F8: Delete special column B Insert Filename Insert Filename	ave 🗎 Save As 🤡 Close



5. Double-click to select the applicable tags.





Note:

Use the tags under **Prescription Requests** for prescription requests that are not yet approved and sent.

For the Rx Request category in the Text/Email template, use the tags under **Prescription Requests**.

Once prescription requests are approved and sent, use the tags under **Prescription**.

For the Rx Status Change category in the Text/Email template, use the tags under **Prescription**.

For denied prescriptions, you can use the Status tag and the Denial Reason tag under **Prescription**.

The text and email notifications only work if the In Touch functionality is enabled.

Rx Management Setup

To access the **Rx Management** window, it is necessary to give the employee or provider the applicable user right in IMS.

Assign the Activities > Rx Management user rights

A user can access the **Rx Management** window only if he or she has the **Activities > Rx Management** user rights.

To assign the user rights, follow these steps:

1. On the IMS menu bar, click **Setup**, and then click **Security**.





- 2. On the gold bar of the **Security** window, select **User** from the first list, and then select the applicable user from the **Employee** list.
- 3. Click the **Grants** tab, and then type Rx Management in the **Grant** box.
- 4. From the **Disallowed Options** list, select **Activities > Rx Management**.
- 5. Click the right-arrow symbol, and then click **Save**.



Figure 23 In the Security window, select Activities > Rx Management, click the right-arrow symbol, and then click Save.

Assign the Activities > Rx Management > Add Rx Request

A user can send prescription requests in the **Rx Management** window only if he or she has the **Activities > Rx Management > Add Rx Request** user rights.





To assign the user rights, follow these steps:

- 1. On the IMS menu bar, click **Setup**, and then click **Security**.
- 2. On the gold bar of the **Security** window, select **User** from the first list, and then select the applicable user from the **Employee** list.
- 3. Click the **Grants** tab, and then type Rx Management in the **Grant** box.
- 4. From the **Disallowed Options** list, select **Activities > Rx Management > Add Rx Request**.
- 5. Click the right-arrow symbol, and then click Save.



Figure 24 In the Security window, select Activities > Rx Management > Add Rx Request, click the right-arrow symbol, and then click Save.



