



IMSTM

Intelligent
Medical
Software

Prescription User Guide

IMS Build 22
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Introduction

In the IMS Prescription module, you can create prescriptions and electronically send these prescriptions to pharmacies. You can also keep track of the changes that you make in these prescriptions.

In IMS Build 22, you can now manage system-generated and manually added prescription requests in Rx Management. In the **Rx Management** window, you can view and edit all the prescription requests from the patients and pharmacies. You can also keep track of the status of the prescription requests that you sent to the pharmacies.

Access the Prescription screen

On the **Prescription** screen, you can create or edit a patient's prescription.

To access the **Prescription** screen, do the following:

- On the IMS menu bar, click **Activities**, and then click **Prescription**.

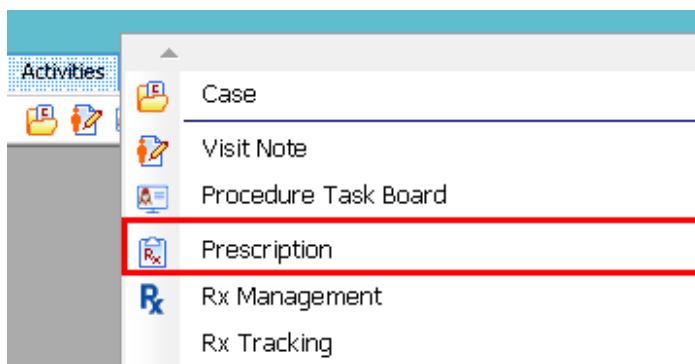



Figure 1 On the IMS menu bar, click **Activities**, and then click **Prescription** to open the **Prescription** screen.

Access the Prescription window

You can also create or edit a patient's prescription in the **Prescription** window.

To access the **Prescription** window, do any of the following:

- On the IMS menu bar, click **Utilities**, point to **Patient**, and then click **Prescription**.
- On the main IMS toolbar, click the **Prescription** symbol .
- In the left pane of the **Visit Note** screen, click **Prescription**.
- In the **Chart View** window, click the **Rx** tab, and then click **Add/Edit** or **Print/Fax Rx**.

This window is similar with the one that opens when you click **Prescription** in the left pane of the **Visit Note** screen.


Access the Rx Management window

You can create, edit, and send prescription requests in the **Rx Management** window.

To access the **Rx Management** window, do any of the following:

- On the IMS menu bar, click **Activities**, and then click **Rx Management**.
- Click the **Rx Management** symbol  on the toolbar.

Note:

The **Rx Management** symbol  appears on the toolbar only if **Rx Management** is selected in the **System's Toolbar Setting** window.

If you have the applicable user right, you can select Rx Management in System's Toolbar Setting, click Windows > Toolbar > Rx Management > Ok.

The Prescription Screen

The Prescription screen consists of four parts: the gold bar, the left pane, the center pane, and the right pane.

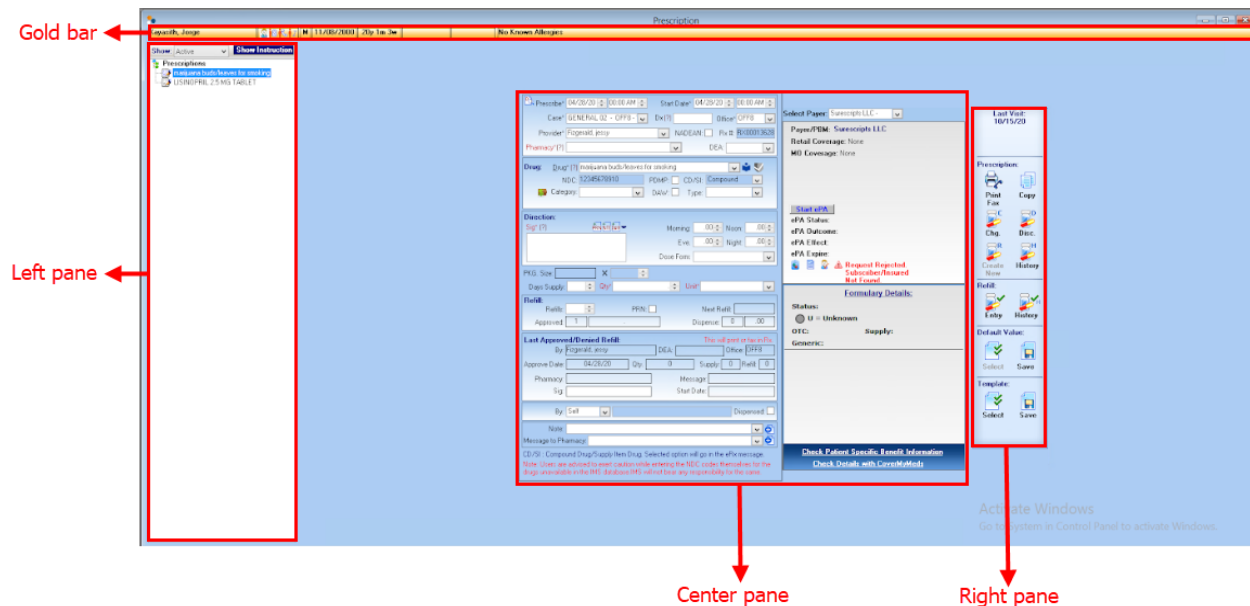


Figure 2 The Prescription screen





Gold Bar

On the gold bar, you can see some basic patient information, such as the name, biological sex, date of birth, age, weight, allergies, and assigned provider.



Figure 3 The gold bar of the Prescription screen

Click the following symbols to access other areas of the patient’s chart:

- **Patient.** Click the **Patient** symbol  to access other windows or modules in IMS that hold information about the patient.
- **Patient Facesheet.** Click the **Patient Facesheet** symbol  to view the patient’s demographic information.
- **Patient Contact.** Click the **Patient Contact** symbol  to view the patient’s contact details.
- **Patient Insurance.** Click the **Patient Insurance** symbol  to view the patient’s insurance information.

Left Pane

In the left pane, you can see the patient’s recorded prescriptions. From the **Show** list, select the type of prescription that you want to retrieve whether active, changed, or discontinued.

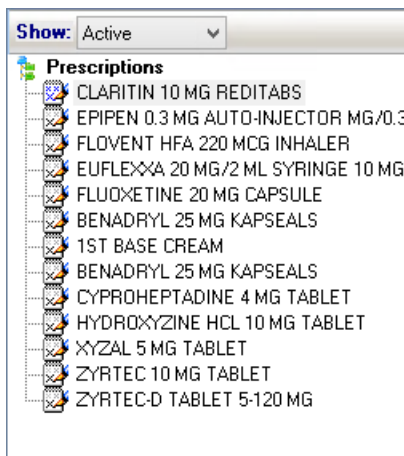
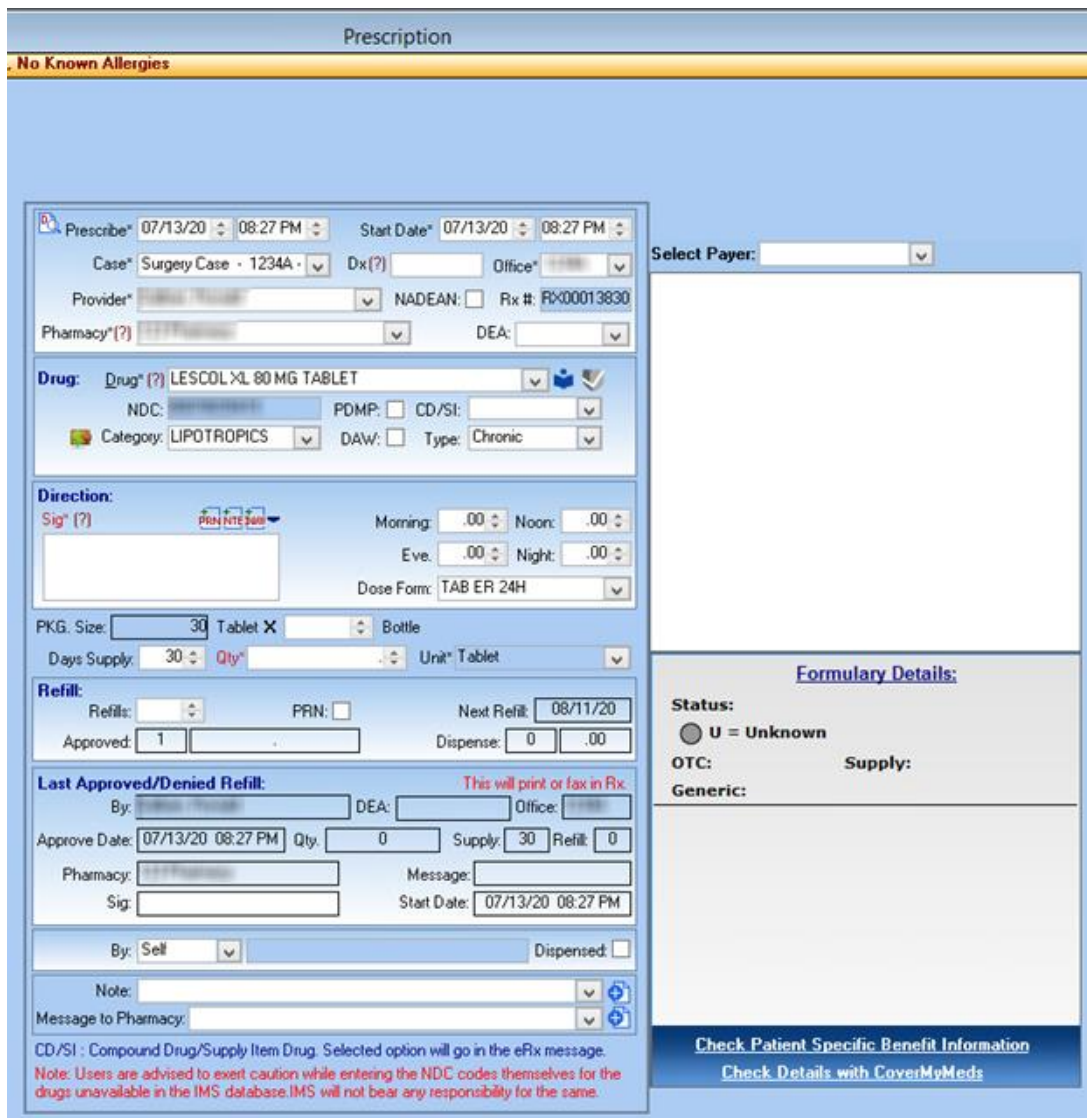


Figure 4 The left pane of the Prescription screen

Center Pane

In the center pane, you can see the details of the prescription that you selected in the left pane. You can modify the details as needed. For a new prescription, enter the necessary information in the applicable boxes in the center pane.



The screenshot shows the 'Prescription' screen with a yellow banner at the top stating 'No Known Allergies'. The main content area is divided into several sections:










- Header:** 'Prescription' title and 'No Known Allergies' banner.
- Prescribe*:** Includes date and time pickers for '07/13/20 08:27 PM' and 'Start Date* 07/13/20 08:27 PM'.
- Case*:** 'Surgery Case - 1234A', 'Dx(?)', and 'Office*'.
- Provider*:** Name field, 'NADEAN: ', and 'Rx #: RX00013830'.
- Pharmacy* (?):** Name field and 'DEA: '.
- Drug* (?):** 'LESCOL XL 80 MG TABLET', 'NDC:', 'PDMP: CD/SI: ', 'Category: LIPOTROPICS', 'DAW: ', and 'Type: Chronic'.
- Direction:** 'Sig* (?)' field with a 'PRN NTE SUI' icon, frequency pickers for 'Morning: .00', 'Noon: .00', 'Eve: .00', and 'Night: .00', and 'Dose Form: TAB ER 24H'.
- PKG. Size:** '30 Tablet X' and 'Bottle'.
- Days Supply:** '30' and 'Qty*'.
- Unit*:** 'Tablet'.
- Refill:** 'Refills: ', 'PRN: ', 'Next Refill: 08/11/20', 'Approved: 1', and 'Dispense: 0 .00'.
- Last Approved/Denied Refill:** Includes 'By:', 'DEA:', 'Office:', 'Approve Date: 07/13/20 08:27 PM', 'Qty: 0', 'Supply: 30', 'Refill: 0', 'Pharmacy:', 'Message:', 'Sig:', and 'Start Date: 07/13/20 08:27 PM'.
- By:** 'Sell' dropdown and 'Dispensed:

Figure 5 The center pane of the Prescription screen

Right Pane

In the right pane, you can see the date of a patient's last visit.

You can also access the following functionalities:

- **Print Fax.** Click the **Print Fax** symbol  to print or fax selected prescriptions.
- **Copy.** Click the **Copy** symbol  to copy the details of the open prescription to another prescription.
- **Chg.** Click the **Chg** symbol  to change the information of an existing prescription after it is entered or saved.
- **Disc.** Click the **Disc.** symbol  to discontinue an existing prescription.
- **Create New.** Click the **Create New** symbol  to create a new prescription from any of the discontinued prescriptions of the patient.
- **History.** Click the **History** symbol  in **Prescription** to open the **Prescription History** window where you can view or print the selected patient's prescription refill history.
- **Entry.** Click the **Entry** symbol  to enter prescription refills for the selected patient.
- **History.** Click the **History** symbol  in **Refill** to view or print the selected patient's prescription history.
- **Select.** Click the **Select** symbol  in **Default Value** to set a default value for selected medications.




- **Save.** Click the **Save** symbol  in **Default Value** to save the default value for a selected drug.
- **Select.** Click the **Select** symbol  in **Template** to set a default template for a prescribed medication.
- **Save.** Click the **Save** symbol  in **Template** to save and add newly entered medications to existing prescription templates.



Figure 6 The right pane of the Prescription screen

The Prescription Window

The **Prescription** window consists of five parts: the gold bar, the blue bar, the center pane, the right pane, and the lower pane.

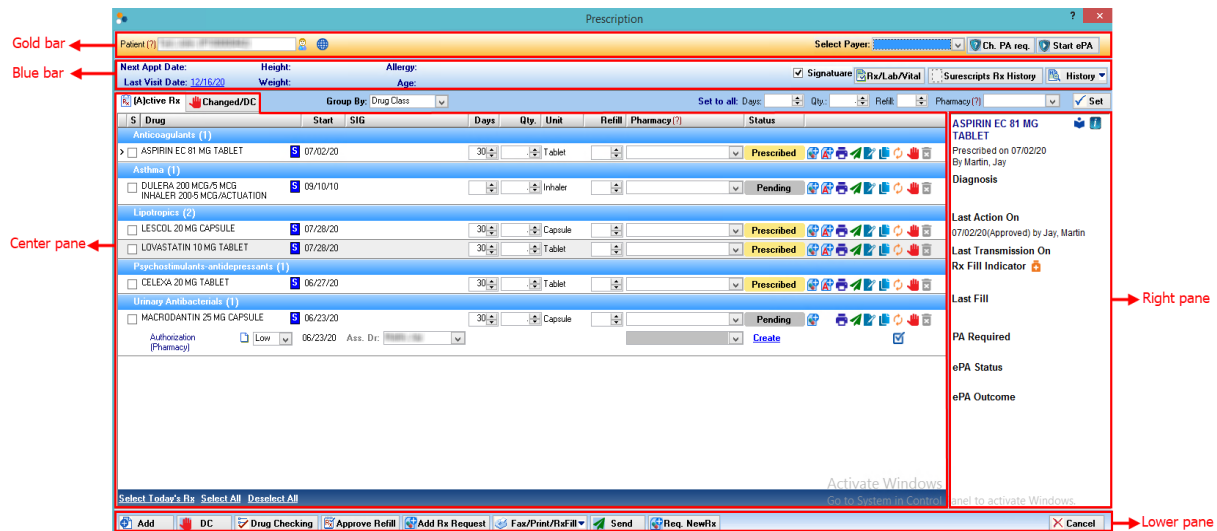


Figure 7 The Prescription window

Gold Bar

On the gold bar of the **Prescription** window, you can search for the patient whose prescription information you want to access.

On the gold bar, click the following to access other functionalities:

- **Patient.** In **Patient**, click the red question mark (?) to search for and select a patient. Click the **Patient** symbol 👤 to access other windows or modules in IMS that hold information about the patient.
- **Select Payer.** From the **Select Payer** list, select a payer for the prescription.

Note:

The system automatically selects the payer based on eligibility by SureScripts.

- **Ch. PA req.** Click **Ch. PA req.** to change the prior authorization request.
 - **Start ePA.** Click **Start ePA** to start Electronic Prior Authorization.
-

Note:

The Ch. PA req. and Start ePA is only available if the Enable Electronic Prior Authorization (ePA) (Modules/Features) is set to Yes in the System Parameters.

Blue Bar

On the blue bar, you can view patient information such as the next appointment date, last visit date, height, weight, allergy, and age.

Click the following to access the applicable functionalities:

- **Signature.** Select the **Signature** check box to include the prescriber's signature in the prescription request.
 - **Rx/Lab/Vital.** Click **Rx/Lab/Vital** to open the **Lab Result Comparison** window.
 - **Surescripts Rx History.** Click **Surescripts Rx History** to open the history of the patient's prescriptions that are sent through Surescripts.
-

Note:

Opening the medication history of a patient requires patient consent.

When the "Patient consent is not given for external medication history information. Would you like to set the patient consent to "Consent Given"?", select **Yes**.

- **History.** From the **History** list, select the prescription history that you want to access.

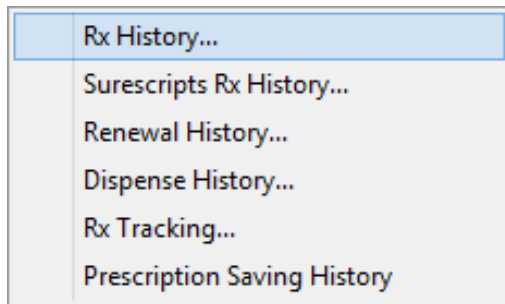


Figure 8 From the **History** list, select the applicable prescription history.

Center Pane

The center pane consists of three tabs: the **(A)ctive Rx** tab, **(T)his Visit** tab, and **Changed/DC** tab.

Note:

The **(T)his Visit** tab is available only if the **Prescription** window is opened from the **Visit Note** screen.

(A)ctive Rx Tab. In the **(A)ctive Rx** tab, you can view the active prescriptions for the patient.

In the **(A)ctive Rx** tab, you can find the following:

- **Group by.** From the **Group by** list, select the applicable drug group if you want the prescriptions to appear in the **(A)ctive Rx** tab according to their drug group.

Note:

You can set the drug grouping in the **Group by** list by setting up the **Show prescription list grouped by** user parameter.

- **Set to all.** In the **Set to all** section, you can set the same days, quantity, refill, and pharmacy for all the prescriptions.



Figure 9 The Group By list and the Set to all section

- **S.** In the **S** column, select the check box for the prescription that you want to select.
- **Drug.** The **Drug** column displays the name and other details of the prescribed drugs.


You can also see the following information in the **Drug** column:


- **Type of Request.** Below the name of the drug, you can see if the type of the prescription request is **Order, Refill, Authorization, Discontinue, or Change.**


The requester is enclosed in parentheses and appears beside the type of request.





Figure 10 The requester appears beside the type of request.

- **Note.** Point to the **Note** symbol  to view the note for the prescription request.

If there is no existing note, you can see the blank **Note** symbol  instead. Click this symbol to add a new note.

- **Priority.** Below the name of the drug, you can see the priority level for the prescription request (**Low, Medium, High, or Emergency**).
- **Drug Schedule.** For scheduled drugs, the drug schedule appears to the right of the drug name.
- **Change to Self and edit.** Click the **Change to Self and edit** symbol  beside the drug name to indicate that you prescribed the prescription.

Note:

If you click the **Change to Self and edit** symbol , it is replaced with the **S** symbol . On the **Prescription** screen, the **By** list is also set to **Self**.

- **Start.** The **Start** column shows the starting date of when the medication is administered.
- **SIG.** The **SIG** column shows the instruction on how the drug should be taken.

You can also view and select the assigned provider in **Ass. Dr** list under the **SIG** column.

- **Days.** In the **Days** column, set the number of days that the drug should be taken.
- **Qty.** In the **Qty.** column, set the quantity of drugs that should be taken.
- **Unit.** The **Unit** column displays the unit of drug that should be taken.

- **Refill.** In the **Refill** column, set the applicable number of refills for the drug.
- **Pharmacy.** From the **Pharmacy** list, select the applicable pharmacy.

You can view the pharmacy's phone and fax numbers in the **Pharmacy** list.

- **Status.** The **Status** column shows the prescription status, which indicates if the prescription is prescribed, sent via eSend or fax, or has a pending request.

The **Error** status appears if the transmission is not successful. Point to the **Error** status bar to view the error message. You can also click the **Error** status bar to resend, print, or fax the prescription requests.

Note:

Printed prescriptions are labeled as **Printed** in the **Status** column.

Expired requests are labeled as **Expired** in the **Status** column.

You can also access the following functionalities in the **Status** column based on the type of request:

- **Change.** For change requests, click **Change** to change the prescription.
- **Discontinue.** For discontinuation requests, click **Discontinue** to discontinue the prescription.
- **Create.** For authorization requests, click **Create** to create manual prior authorization or electronic prior authorization.

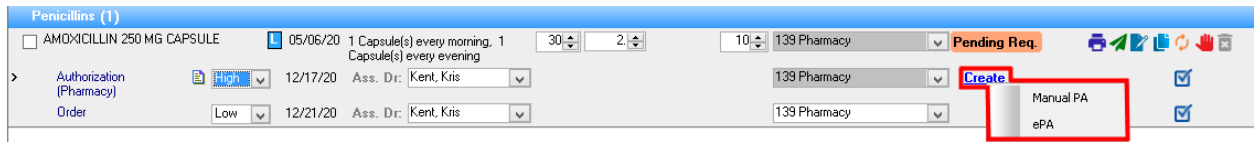


Figure 11 Click **Create** to create manual prior authorization or electronic prior authorization.

- **Prescribe.** Click **Prescribe** for new requests in the **Other Request** row.




Note:




Manually entered new prescriptions appear in the **Other Request** row without a status.

After you click **Prescribe**, the status of the new prescription changes to **Prescribed** and no longer appears in the **Other Request** row.

Electronic prescription requests are automatically added, and the status appears as **Electronic Rx Request**.




Electronic prescription requests are automatically assigned to the last provider who approved a prescription request.

- **Approve/Deny.** Click the **Approve/Deny** toggle button to approve or deny refill requests.
- **Add Request.** Click the **Add Request** symbol  to add a refill, change, or discontinue request.
- **Add PA Request.** Click the **Add PA Request** symbol  to add a prior authorization request.
- **Approve & Print.** Click the **Approve & Print** symbol  to approve and print the prescription request.

- **Approve & Send.** Click the **Approve & Send** symbol  to approve and send the prescription request.
- **Edit.** Click the **Edit** symbol  to open the **Edit Prescription** window and edit the prescription.
- **Copy and Edit.** Click the **Copy and Edit** symbol  to copy a prescription request.

Note:

If you select the **Copy & Edit** option, the system will ask if you want to discontinue the old prescription.



- **Change.** Click the **Change** symbol  to change the prescription.
- **Discontinue.** Click the **Discontinue** symbol  to discontinue the prescription.
- **Delete.** Click the **Delete** symbol  to delete the prescription.

Note:

Only prescriptions that are added in the current visit note can be deleted.

A prescription that is added from another visit note cannot be deleted.

The **Delete** symbol  appears in gray to signify that the prescription cannot be deleted.

- **View Selected Documents.** Click the **View Selected Documents** symbol  to view patient documents.
- **Click here to mark the Request done.** Click the **Click here to mark the Request done** symbol  to mark the request as done.

Note:

Requests from Surescripts, IMS CarePortal, and IMS Patient App cannot be marked as done.

Only manually added requests can be marked as done.

(T)his Visit Tab. You can view the prescriptions that are added for the current visit in the **(T)his Visit** tab.

In the **(T)his Visit** tab, you can find the following:

- **Drug.** The **Drug** column shows the name of the drugs added for the current visit.
- **Status.** The **Status** column shows the status of the prescription.
- **Effect.** Select the applicable effect for the prescription from the **Effect** list.
- **Note.** Type a note in the **Note** section.

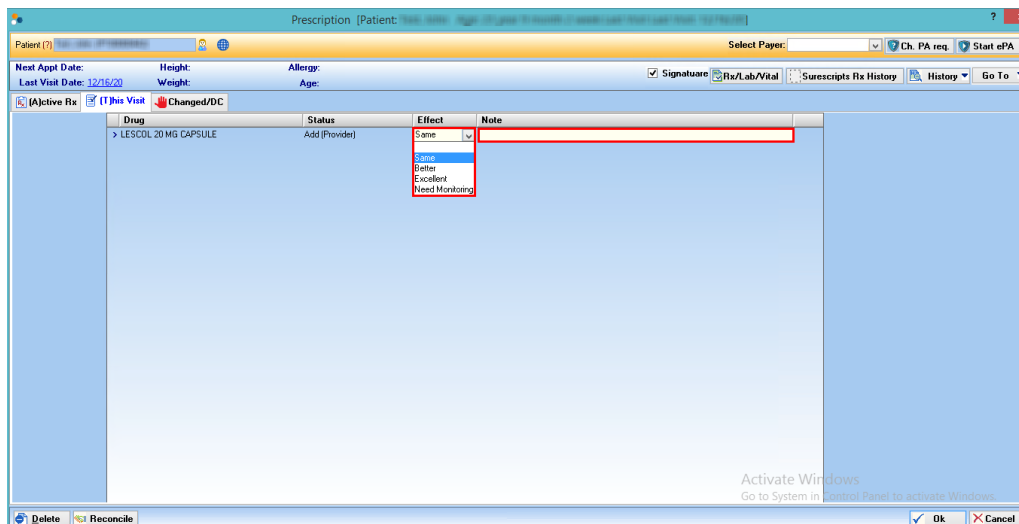


Figure 12 In the **(T)his Visit** tab, select the applicable effect from the **Effect** list, and then type a note in the **Note** section.

Changed/DC Tab. You can view the changed and discontinued prescriptions in the Changed/DC tab.

In the Changed/DC tab, you can find the following:

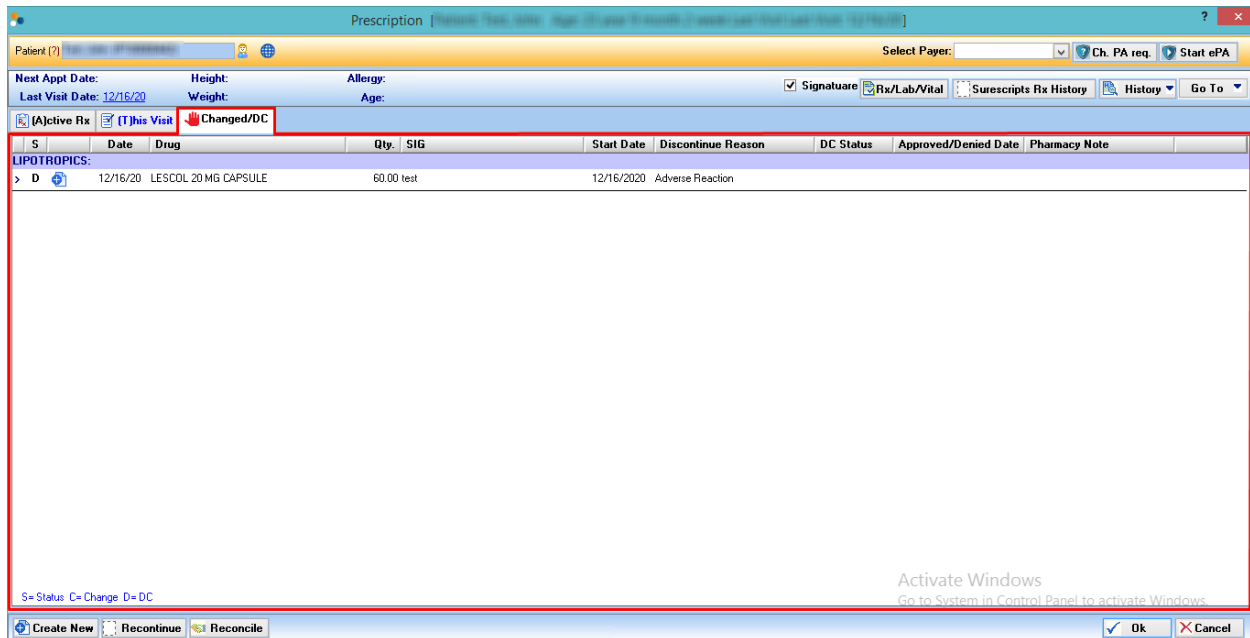



Figure 13 The Changed/DC tab in the Prescription window

- **S.** The **S** column shows the status of the drug.
- **Date.** The **Date** column shows the date when the drug was changed or discontinued.
- **Drug.** The **Drug** column displays the name of the discontinued or changed drug.
- **Qty.** The **Qty.** column shows the quantity of the drug.
- **SIG.** The **SIG** column shows the instruction on how the drug was previously taken.

- **Start Date.** The **Start Date** column shows the starting date of when the medication was previously administered.
- **Discontinue Reason.** The **Discontinue Reason** column shows the reason the drug was discontinued.
- **DC Status.** The **DC Status** column shows the status of the discontinued drug.
- **Approved/Denied Date.** The **Approved/Denied Date** column shows the date when the drug was approved or denied for change or discontinue.
- **Pharmacy Note.** The **Pharmacy Note** section displays notes from the pharmacy.
- **Create New.** Click the **Create New** symbol  to create a new prescription.
- **Recontinue or Create New.** Right-click the applicable drug, and then select **Recontinue** to recontinue a discontinued drug or **Create New** to create a new prescription.

Note:

Recontinue is only applicable to discontinued drugs that are discontinued on the current day.

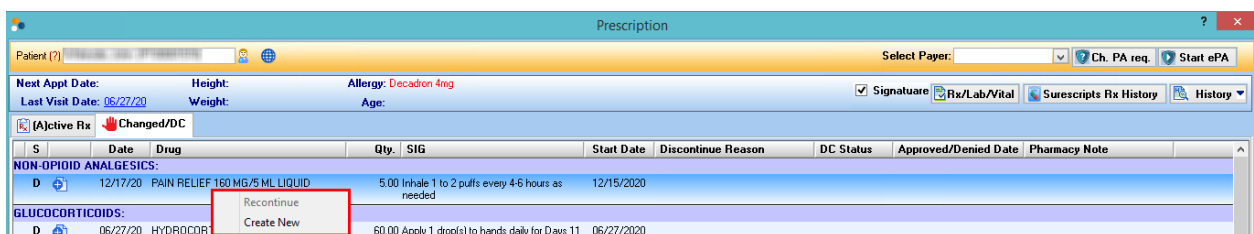







Figure 14 Right-click the applicable drug, and then select **Recontinue** to recontinue a discontinued drug or select **Create New** to create a new prescription.

Right Pane

The right pane of the **Prescription** window shows the request information of the selected prescription from the **(A)ctive Rx** tab.

In the right pane, you can access the following functionalities:

- **View Drug Education.** Click the **View Drug Education** symbol  to view the drug information in the **Drug Information** window.
- **Click here to open weblink for patient education.** Click the **Click here to open weblink for patient education.** symbol  to view relevant health information from the web.
- **Click here to add the drug into This Visit.** Click the **Click here to add the drug into This Visit** symbol  to add the selected drug into the **(T)his Visit** tab.
- **Click here to remove the drug from This Visit.** Click the **Click here to remove the drug from This Visit** symbol  to remove the selected drug from the **(T)his Visit** tab.
- **Condition.** Click the **Condition** symbol  to open the condition list where you can select the patient's condition for the current visit.


Note:

The **Condition** symbol is only available if you add the selected drug into the **(T)his Visit** tab.

- **Prescribed on *Date*.** In the **Prescribed on *Date*** section, you can view the date when the drug was prescribed.
- **Diagnosis.** In the **Diagnosis** section, you can view the diagnosis which the drug is prescribed for.

- **Last Action On.** In the **Last Action On** section, you can view the date when the last action was taken for the prescription.

You can also view the name of the provider who performed the last action.

- **Last Transmission On.** In the **Last Transmission On** section, you can view the date of last transmission, the name of the pharmacy, the pharmacy address, and the type of transmission.
- **Rx Fill Indicator.** Click the **Rx Fill Indicator** symbol  to select the status of the prescription fill indicator in the **Rx Fill Indicators** window.
- **Last Fill.** In the **Last Fill** section, you can view the date when the drug was last refilled.
- **PA Required.** In the **PA Required** section, you can view if the prescription requires a prior authorization.
- **ePA Status.** In the **ePA Status** section, you can view the status of the electronic prior authorization.
- **ePA Outcome.** In the **aPA Outcome** section, you can view the applicable response for the electronic prior authorization.

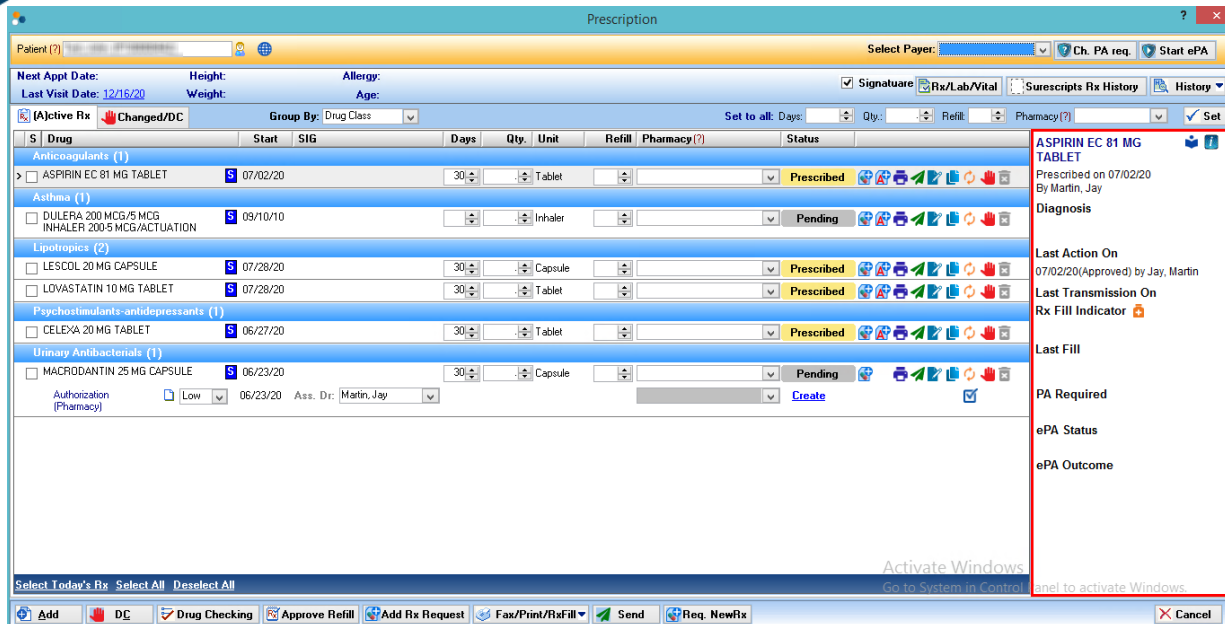


Figure 15 The right pane of the Prescription window

Lower Pane

In the lower pane, you can add, delete, approve, deny, or reconcile prescriptions. You can also access **Drug Checking** in the lower pane.

Use the following lower pane functionalities if you want to perform an action for multiple prescriptions at once:

- **Add.** Click **Add** to add a new prescription in the **(A)ctive Rx** tab.
- **Delete.** Click **Delete** to delete an item in the **(A)ctive Rx** tab, and in the **(T)his Visit** tab.
- **DC.** Click **DC** to discontinue the prescription.
- **Drug Checking.** Click **Drug Checking** to open the **Drug Checking** window.

- **Approve Refill.** Click **Approve Refill** to approve prescriptions.
- **Reconcile.** Click **Reconcile** to open the **Reconciliation** window.
- **Add Rx Request.** Click **Add Rx Request** to add a new prescription request.
- **Fax/Print/RxFill.** Click the **Fax/Print/RxFill** to fax, print, or send prescriptions.

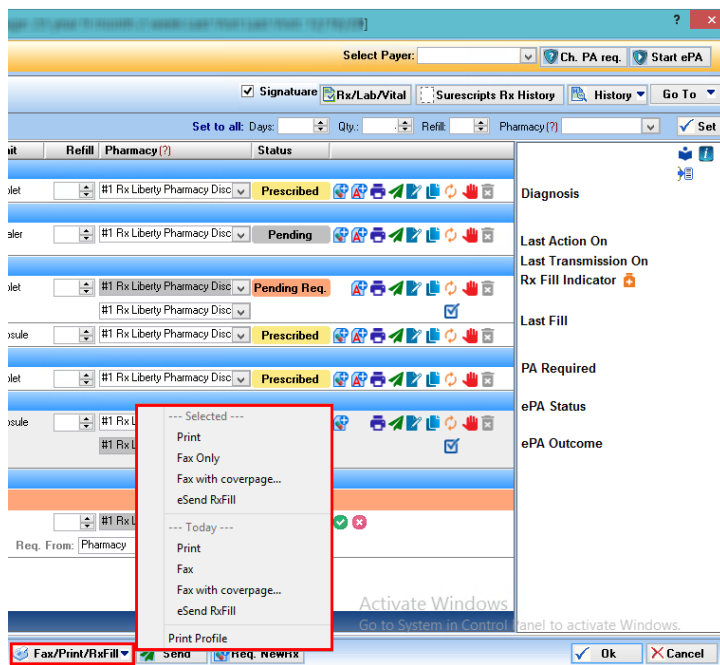


Figure 16 Click the applicable **Fax/Print/RxFill** option to perform an action for all the selected prescriptions or for all of the day's prescriptions.

Note:

Using the **Fax/Print/RxFill** options, you can perform an action for all the selected prescriptions or for all of the day's prescriptions.

- **Send.** In the **(A)ctive Rx** tab, click **Send** to send prescription requests.
- **Req. NewRx.** In the **(A)ctive Rx** tab, click **Req. NewRx** to add a new prescription request.

When you click **Req. NewRx**, the system adds a new prescription request in a new row under **Other Request**.

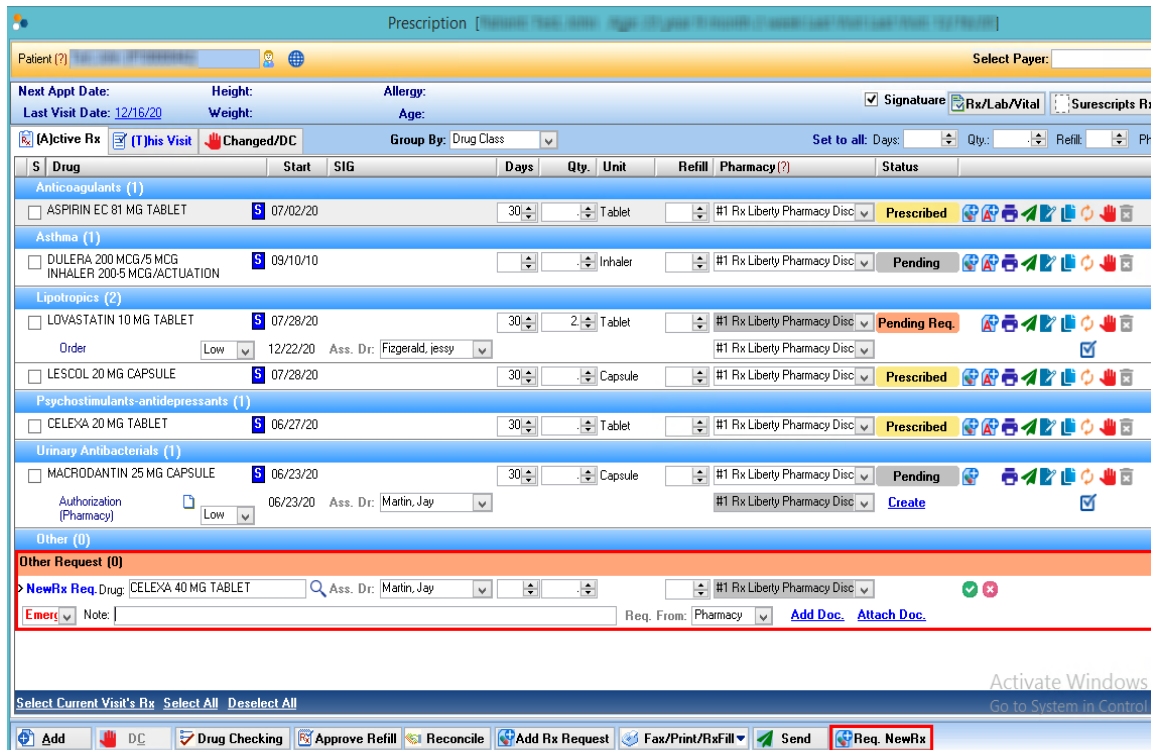


Figure 17 If you click **Req. NewRx**, the system adds a new prescription request in a new row under **Other Request**.

The Rx Management Window

In the **Rx Management** window, you can manage all prescription requests. Electronic prescription requests are directly added to the **Rx Management** window. Other prescription requests from fax documents can also be added in the **Rx Management** window through the **Fax/HIE Received** window.

The **Rx Management** window consists of three parts: the gold bar, the center pane, and the lower pane.

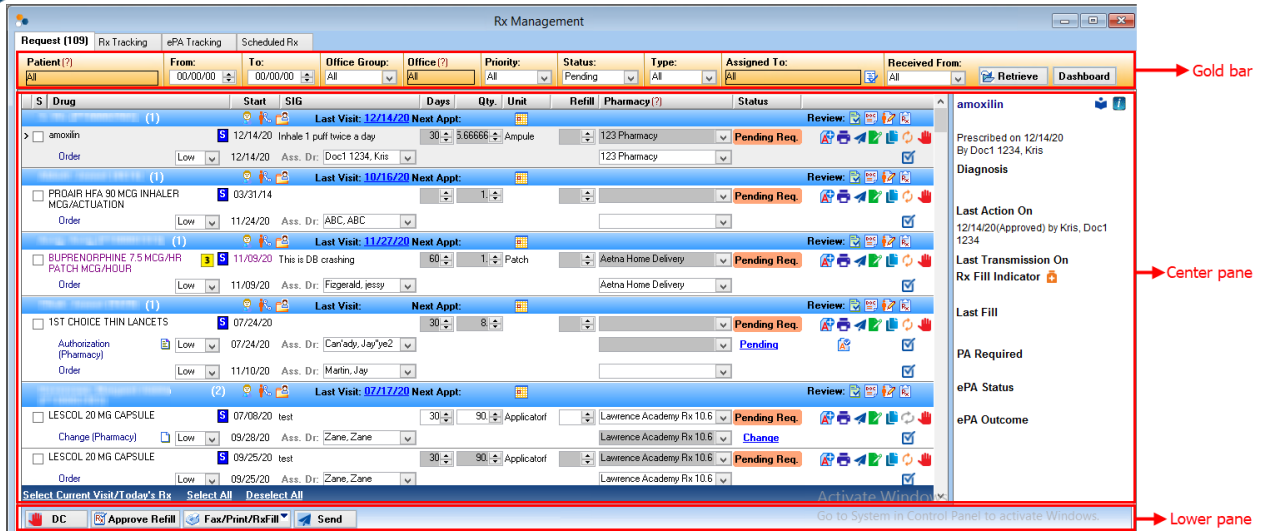


Figure 18 The Rx Management window

Gold Bar

On the gold bar, you can filter the prescription requests that you want to appear in the center pane using the different filter criteria.

The functionalities of the gold bar depend on the selected tab in the center pane.



Figure 19 The gold bar of the Request tab.

Center Pane

The center pane consists of four tabs: the **Request** tab, the **Rx Tracking** tab, the **ePA Tracking** tab, and the **Scheduled Rx** tab.

Request Tab. The **Request** tab of the **Rx Management** window is similar to the **(A)ctive Rx** tab of the **Prescription** window. However, the **Request** tab has added functionalities.

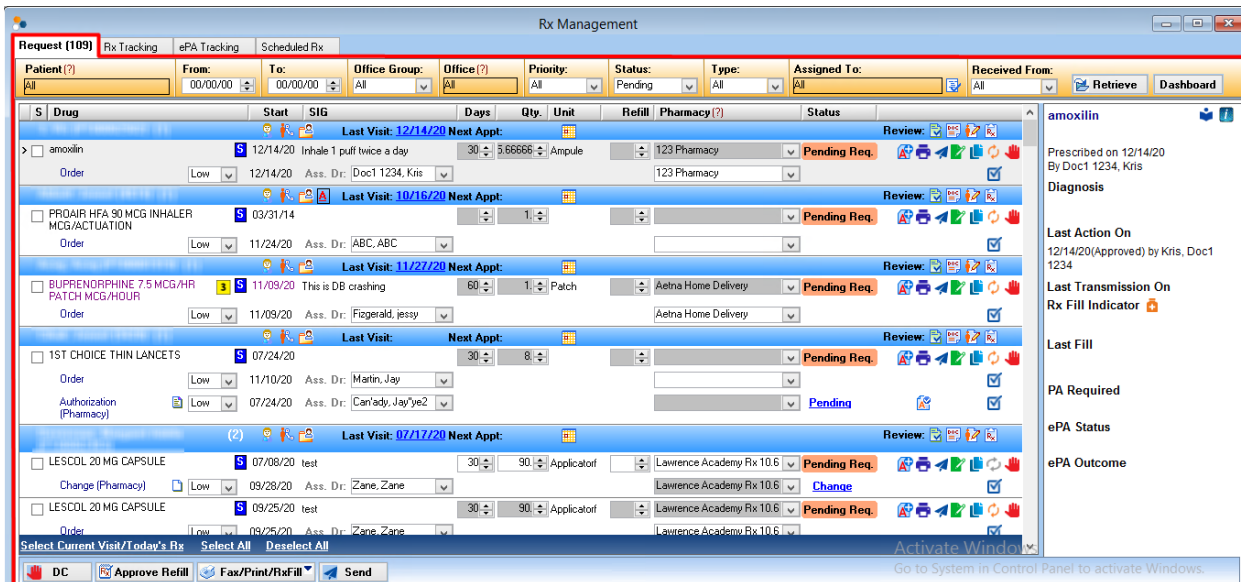




Figure 20 The Request tab in the Rx Management window

In the **Request** tab, you can access the following added functionalities:

- **Gold Bar.** On the gold bar, select the applicable filter criteria, and then click **Retrieve**.

On the gold bar, you can find the following:

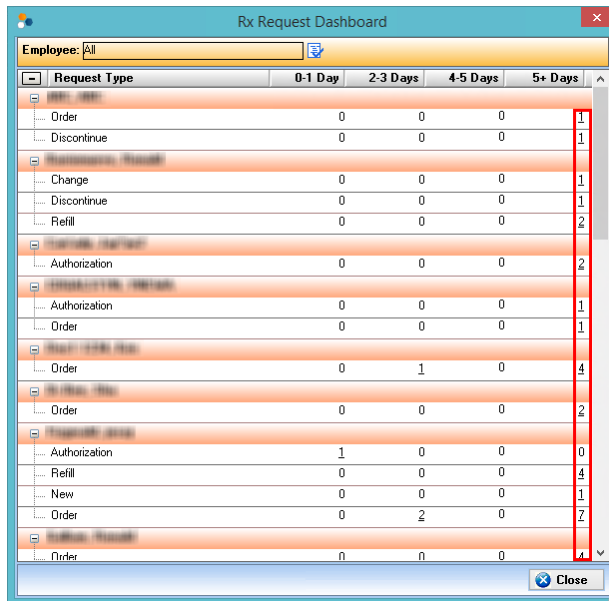
- **Patient.** Click the red question mark (?) beside **Patient** to select a patient.
- **From and To.** Select a date in the **From and To** section to search for a prescription within specific dates.
- **Office Group.** From the **Office Group** list, select the applicable office group.

- **Office.** Click the red question mark  beside **Office** to select the applicable office.
- **Priority.** From the **Priority** list, select the applicable priority.
- **Status.** From the **Status** list, select the applicable status.
- **Type.** From the **Type** list, select the type of requests that you want to show in the center pane.
- **Assigned To.** Click the **Assigned To** symbol  to open the **Select Provider** window where you can select the applicable employees.

The system shows the logged-on user in the **Assigned Dr** box by default.




- **Received From.** From the **Received From** list, select the prescriptions that you want to appear in the center pane based on where the request was sent from.
- **Dashboard.** Click the **Dashboard** button on the gold bar to open the **Rx Request Dashboard** window where you can view the prescription requests for all providers. You can also view the type of requests and the aging status for each prescription request in **Rx Request Dashboard**.

You can click the aging count to view the indicated prescription requests in the **Rx Management** window.



Request Type	0-1 Day	2-3 Days	4-5 Days	5+ Days
Order	0	0	0	1
Discontinue	0	0	0	1
Change	0	0	0	1
Discontinue	0	0	0	1
Refill	0	0	0	2
Authorization	0	0	0	2
Authorization	0	0	0	1
Order	0	0	0	1
Order	0	1	0	4
Order	0	0	0	2
Authorization	1	0	0	0
Refill	0	0	0	4
New	0	0	0	1
Order	0	2	0	2
Order	0	0	0	2

Figure 21 In the Rx Request Dashboard window, click the aging count to view the indicated prescription requests in the Rx Management window.

- **Prescription Requests Count.** Beside the patient name, you can see the number of prescription requests for each patient.
- **Patient.** Click the **Patient** symbol  to access other windows or modules in IMS that hold information about the patient.
- **Open Patient Contact Detail(s).** Click the **Open Patient Contact Detail(s)** symbol  to open the **Open Patient Contact Details** window where you can view the patient’s contact information.
- **Chart View.** Click the **Chart View** symbol  to open the patient chart window.

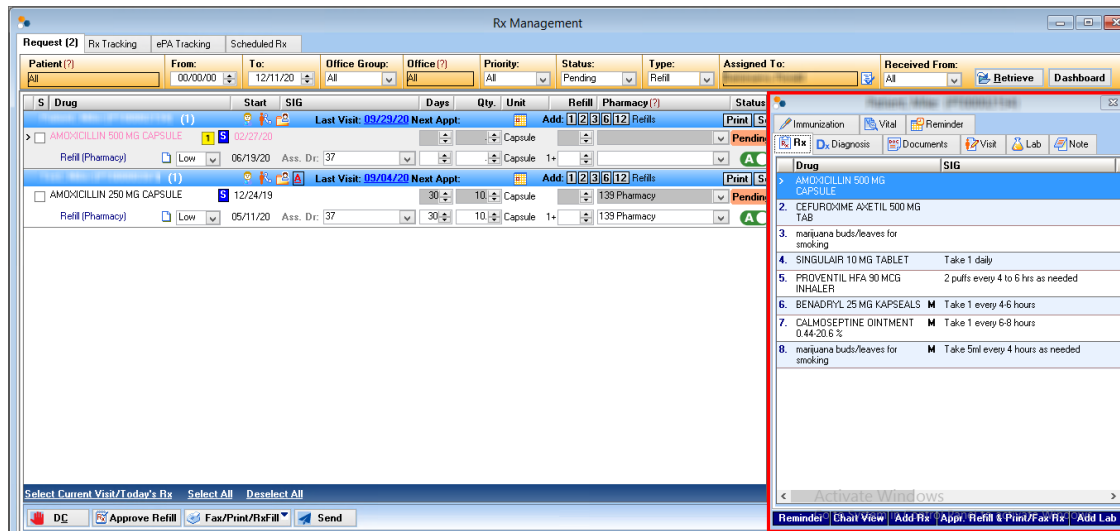








Figure 22 The patient chart window

- **Allergy.** Point to the **Allergy** symbol  to view the patient's allergy.
- **Last Visit Date.** Click the **Last Visit** date to open the **Visit Note Summary** window.

Note:

The **Last Visit** date appears in blue if it is within two months from the current month. Otherwise, the **Last Visit** date appears in red.

- **Schedule an Appointment.** Click the **Schedule an Appointment** symbol  to open the **Scheduler** window where you can schedule the patient's appointment.
- **Vital/Lab.** Click the **Vital/Lab** symbol  to open the **Lab Result Comparison** window where you can view the comparison between laboratory results and the patient's vitals.
- **Document(s).** Click the **Document(s)** symbol  to open the **Patient Document(s)** window.

- **VN Compare.** Click the **VN Compare** symbol  to open the **Compare Visit Note(s) Information for Patient *Patient Name*** window.
- **Prescription.** Click the **Prescription** symbol  to open the **Prescription** window.

Note:

You cannot edit a pharmacy for Surescripts requests.

- **Add.** For refill requests, click the number button in the **Add** section that corresponds to the refill quantity that you want to add.



Figure 23 Click the number button in the **Add** section that corresponds to the refill quantity that you want to add.

- **Print.** For refill requests, click the **Print** button to open the **Approve/Deny Rx Renewal** window where you can approve and print the applicable refill request.
- **Send.** For refill requests, click the **Send** button to approve or deny the applicable refill request.

Note:

The **Add**, **Print**, and **Send** buttons work without marking the **S** check box.

- **Select Today's Rx.** Click **Select Today's Rx** in the lower-left corner of the **Request** tab to select the prescription requests that are added on the current day.
- **Select All.** Click **Select All** to select all the prescription requests.
- **Deselect All.** Click **Deselect All** to clear the selected prescription requests.

Note:

In the **Request** tab of the **Rx Management** window, take note of the following:





- Prescription requests sent through calls from the pharmacy or patient are manually inputted.
 - You cannot edit the **Pharmacy** box for Surescripts requests.
 - You cannot delete system-generated requests. Only manual requests can be deleted.
-


Rx Tracking Tab. In the **Rx Tracking** tab, you can view the status of prescription change requests, refill requests, and renewal requests that are sent to the pharmacy.


You can also access the following functionalities in the **Rx Tracking** tab:

- **Gold Bar.** On the gold bar, select the applicable filter criteria, and then click **Retrieve**.

On the gold bar, you can find the following filter criteria:

- **From and To.** Select a date in the **From and To** section to search for a prescription within specific dates.
- **Patient.** Click the red question mark  beside **Patient** to select a patient.
- **Pharmacy.** Click the red question mark  beside **Pharmacy** to select the applicable pharmacy.
- **Office.** Click the red question mark  beside **Office** to select the applicable office.
- **Provider.** Click the red question mark  beside **Provider** to select the applicable provider.



- **Status.** From the **Status** list, select the status of prescriptions that you want to show in the center pane.
- **Trans. Type.** From the **Trans. Type** list, select the applicable transmission type.
- **Message Type.** From the **Message Type** list, select which prescriptions to show in the center pane based on the Surescript message.
- **Note.** Point to the note symbol  to view the prescription notes. You can click the same symbol to edit the note.

You can click the blank note symbol  to add a new note.

- **Status.** In the **Status** column, you can view the status of the sent prescription requests.
- **Sent Via.** In the **Sent Via** column, you can view the type of service used to send the prescription request.
- **Created Date/Time.** In the **Created Date/Time** column, you can view the date and time when the request was sent.
- **Patient.** In the **Patient** column, you can view the name of the patient for whom the prescription request was sent.
- **Pharmacy.** In the **Pharmacy** column, you can view the applicable pharmacy for the prescription request.
- **Fax No.** In the **Fax No.** column, you can view the applicable fax number of the pharmacy.
- **Office.** In the **Office** column, you can view the applicable office for the prescription requests.

- **Provider.** In the **Provider** column, you can view the applicable provider for the prescription request.
- **Drug.** In the **Drug** column, you can view the drug name.
- **Drug Schedule.** The Drug Schedule appears on the right side of the drug name.
- **Created By.** In the **Created By** column, the system displays the name of the employee if the prescription request is manually created.

The system displays **system** if the prescription request is system-generated.

- **Sent Date/Time.** In the **Sent Date/Time** column, you can view the date and time when the prescription request was sent.
- **View Surescripts Message.** Point to the **View Surescripts Message** symbol  to view the Surescripts response.
- **View History.** Click the **View History** symbol  to open the **eSend History** window.

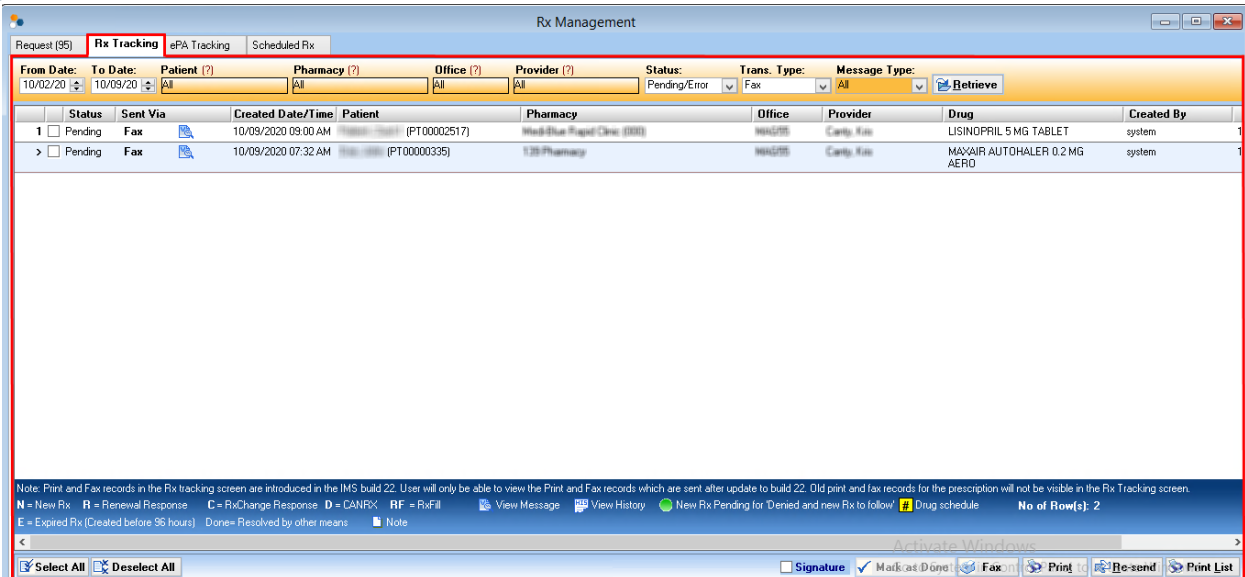


Figure 24 The Rx Tracking tab in the Rx Management window


ePA Tracking Tab. In the ePA Tracking tab, you can view prior authorization requests.

In the ePA Tracking tab, you can see the following:

- **Gold bar.** On the gold bar, select the applicable filter criteria, and then click **Retrieve**.




On the gold bar, you can find the following filter criteria:

- **From and To.** Select a date in the **From and To** section to search for a prescription within specific dates.
- **Patient.** Click the red question mark (?) beside **Patient** to select a patient.
- **Office.** Click the red question mark (?) beside **Office** to select the applicable office.

- **Provider.** Click the red question mark  beside **Provider** to select the applicable provider.
- **Status.** From the **Status** list, select the prior authorization status that you want to show in the center pane.
- **Outcome.** From the **Outcome** list, select the prior authorization outcome that you want to show in the center pane.
- **Type.** From the **Type** list, select the type of prior authorization that you want to show in the center pane.
- **Type.** In the **Type** column, the system displays **P** for Prospective ePA and **R** for Retrospective ePA.
- **ePA Type.** In the **ePA Type** column, the system displays **E** for ePA-connected payer and **F** for classic or fax payer.
- **Status.** In the **Status** column, you can view the status of the ePA request.
- **Outcome.** In the **Outcome** column, you can view the outcome of the ePA request.
- **Patient.** In the **Patient** column, you can view which patient the ePA request is for.
- **Office.** In the **Office** column, you can view the applicable office for the ePA request.
- **Provider.** In the **Provider** column, you can view the name of the applicable provider.
- **Drug.** In the **Drug** column, you can view the drug name.

- **PBM.** In the **PBM** column, you can view the pharmacy benefit manager of the patient's health insurance.
- **Pharmacy.** In the **Pharmacy** column, you can view the applicable pharmacy.
- **Effective Date.** In the **Effective Date** column, you can view the effective date of the prior authorization.
- **Expiration Date.** In the **Expiration Date**, you can view the expiration date of the prior authorization.
- **Created Date.** In the **Created Date**, you can view the date the prior authorization request was created.
- **Created By.** In the **Created By** column, the system displays the name of the employee if the authorization request is manually created.

The system displays **system** if the authorization request is system generated.





- **Edit or View PA in browser.** Click the **Edit or View PA in browser** symbol  to edit prior authorization.
- **View PDF form of PA request.** Click the **View PDF form of PA request** symbol  to view the prior authorization in PDF format.
- **View Details of PBM.** Click the **View Details of PBM** symbol  to view the details of pharmacy benefit manager.

Scheduled Rx tab. In the **Scheduled Rx** tab, you can view the list of scheduled drugs prescribed to the patient.

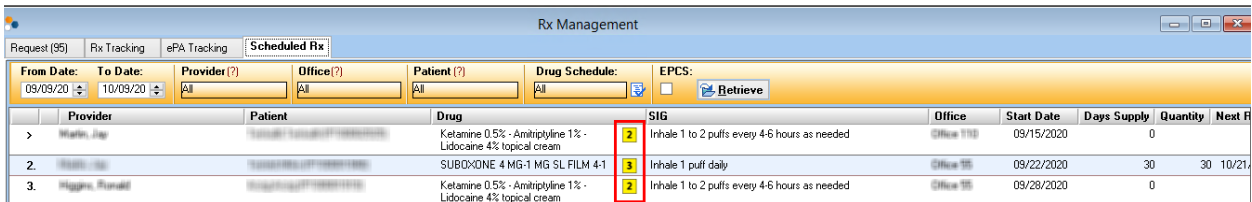
In the **Scheduled Rx** tab, you can see the following:

- **Gold bar.** On the gold bar, select the applicable filter criteria, and then click Retrieve.

On the gold bar, you can find the following filter criteria:

- **From and To.** Select a date in the **From** and **To** section to search for a prescription within specific dates.
- **Provider.** Click the red question mark  beside **Provider** to select the applicable provider.
- **Office.** Click the red question mark  beside **Office** to select the applicable office.
- **Patient.** Click the red question mark  beside **Patient** to select a patient.
- **Drug Schedule.** Click the **Drug Schedule** symbol  to select applicable drug schedule in the **Select Drug Schedule** window.
- **EPCS.** Select the **EPCS** check box to show only the controlled substances that were electronically prescribed.
- **Provider.** In the **Provider** column, you can view the name of the provider who prescribed the scheduled drug.
- **Patient.** In the **Patient** column, you can view the name of the applicable patient.
- **Drug.** In the **Drug** column, you can view the name of the scheduled drugs.
- **SIG.** In the **SIG** column, you can view the instructions on how to take the scheduled drugs.

- **Office.** In the **Office** column, you can view the applicable office.
- **Start Date.** In the **Start Date** column, you can view the starting date of when the prescription is administered.
- **Days Supply.** In the **Days Supply** column, you can view the number of days that the drug supply should last before the next refill.
- **Quantity.** In the **Quantity** column, you can see the quantity of the prescribed scheduled drug.
- **Next Refill.** In the **Next Refill** column, you can see the date of the next refill.
- **No. of Refill.** In the **No. of Refill** column, you can see the number of refills that is prescribed for the drug.
- **Drug Schedule.** The drug schedule appears to the right of the drug name.



From Date:	To Date:	Provider(?)	Office(?)	Patient(?)	Drug Schedule:	EPCS:				
09/09/20	10/09/20	All	All	All	All	<input type="checkbox"/>	<input type="button" value="Retrieve"/>			
Provider	Patient	Drug	SIG	Office	Start Date	Days Supply	Quantity	Next R		
>	Walter, Jay	Ketamine 0.5% - Amitriptyline 1% - Lidocaine 4% topical cream	Inhale 1 to 2 puffs every 4-6 hours as needed	Office 110	09/15/2020	0				
2.	Walter, Jay	SUBOXONE 4 MG-1 MG SL FILM 4-1	Inhale 1 puff daily	Office 95	09/22/2020	30	30	10/21		
3.	Higgin, Ronald	Ketamine 0.5% - Amitriptyline 1% - Lidocaine 4% topical cream	Inhale 1 to 2 puffs every 4-6 hours as needed	Office 95	09/28/2020	0				

Figure 25 In the **Scheduled Rx** tab, the drug schedule appears beside the drug name.

Lower Pane

In the lower pane, you can perform an action for multiple prescriptions at once.

In the lower pane, click the following functionalities:

- **DC.** Click **DC** to discontinue the selected drugs.

- **Approve Refill.** Click **Approve Refill** to approve the selected refill requests.
- **Fax/Print/RxFill.** Click the **Fax/Print/RxFill** to show the options to fax, print, or send prescriptions.
- **Send.** Click **Send** to send the selected prescription requests.
- **Add Rx Request.** Click **Add Rx Request** to open the **Add Rx Request** window where you can add a new prescription request.
- **Mark as Done.** In the **Rx Tracking** tab, click **Mark as Done** to mark selected prescription requests as done.

Note:

Requests from Surescripts, IMS CarePortal, and IMS Patient App cannot be marked as done.

Only manually added requests can be marked as done.

- **Fax.** In the lower pane of the **Rx Tracking** tab, click **Fax** to fax the applicable prescription requests.
- **Print.** Click **Print** to print the applicable prescription requests.
- **Re-send.** Click **Re-send** to send prescription requests that have a **Pending** or **Error** status.
- **Print List.** In the lower pane of the **Rx Tracking**, **ePA Tracking**, and **Scheduled Rx** tabs, click **Print List** to print the applicable lists.
- **Delete.** In the **ePA Tracking** tab, click **Delete** to delete the selected prior authorization requests.


Prescription End-User Functionalities

In the Prescription module, you can do tasks like creating a prescription, prescribing drugs to patients, and viewing the prescription history of patients.

Create a prescription

When you create a prescription, some details that are saved on the **Patient Master** screen automatically appear on the **Prescription** screen.

To create a prescription for a patient, follow these steps:


1. On the IMS menu bar, click **Activities**, and then click **Prescription**.
2. On the action toolbar of the **Prescription** screen, click the **New** symbol .

If a patient is not yet selected, search for and select the applicable patient in the **Search Patient** window.


3. Review the details that automatically appear in the **Case**, **Office**, **Provider**, and **Pharmacy** boxes

The current date automatically appears in **Prescribe** and **Start Date**. You can add or change the information as needed.

The **NADEAN** check box is automatically checked for drugs with the generic name **Buprenorphine**.

4. Enter the necessary information in the applicable sections.
5. Click the **Save** symbol  on the action toolbar.

Note:

To change some details in a prescription, open the **Prescription** screen > click the applicable prescription in the left pane > edit the necessary information in the center pane > and then click the **Save** symbol  on the action toolbar.

Add a prescription

You can prescribe a drug to a patient through the **Visit Note** screen. The prescribed drugs appear in the **Prescription** section in the center pane of the **Visit Note** screen.

To add a prescription, follow these steps:

1. On the IMS menu bar, click **Activities**, and then click **Visit Note**.
2. In the **Search Patient** window, search for and select the applicable patient, and then click **Ok**.
3. In the left pane of the **Visit Note** screen, click **Prescription**.
4. In the **Prescription** window, click **Allow Edit** in the lower pane, and then click **Add**.

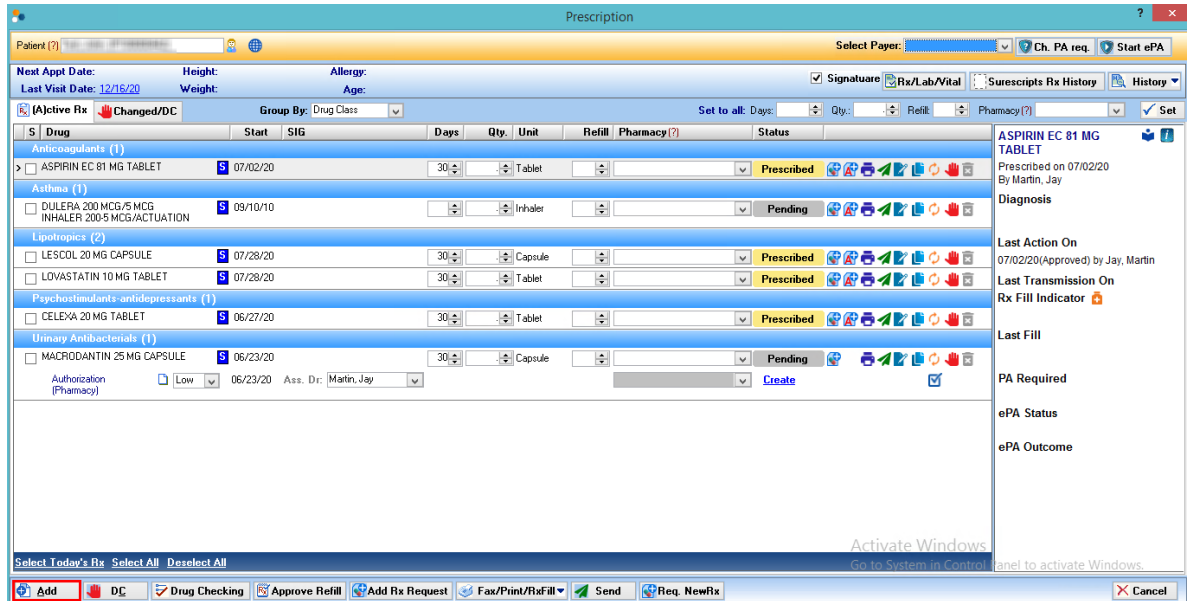


Figure 26 In the lower pane of the Prescription window, click Add to open the Add Prescription window.

5. In the **Drug Search** box of the **Add Prescription** window, type the name of the drug that you want to add.
6. In the **Select Template** pane, search for a drug using the drug templates.

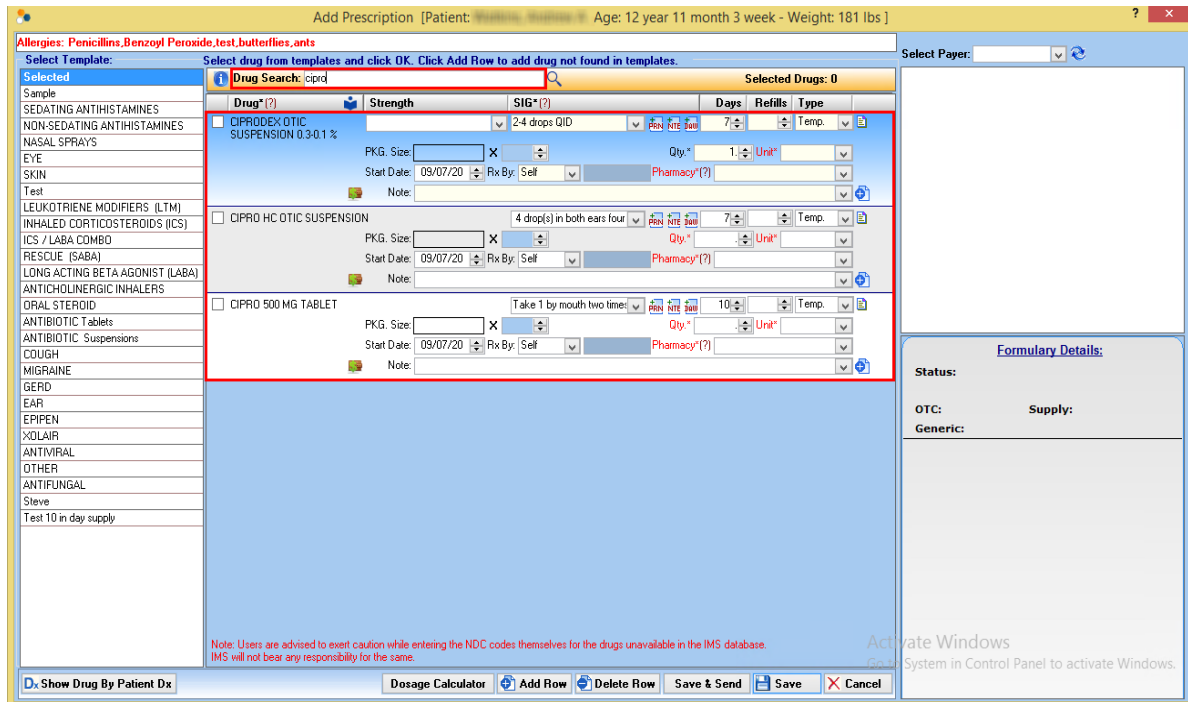


Figure 27 In the Drug Search box of the Add Prescription window, type the name of the drug that you want to search. In the center pane, select the drug that you want to add and enter the applicable information.

- In the center pane, mark the check box beside the name of the drug that you want to add.

Note:

You can select multiple drugs from across different templates.

All selected drugs appear on top of the center pane.

- To add a drug not found in the templates, click **Add Row** in the lower pane.
- Select from the drug list the drug that you want to add or click the question mark (?) beside the **Drug** to search the drug in the **Search Drug** window.

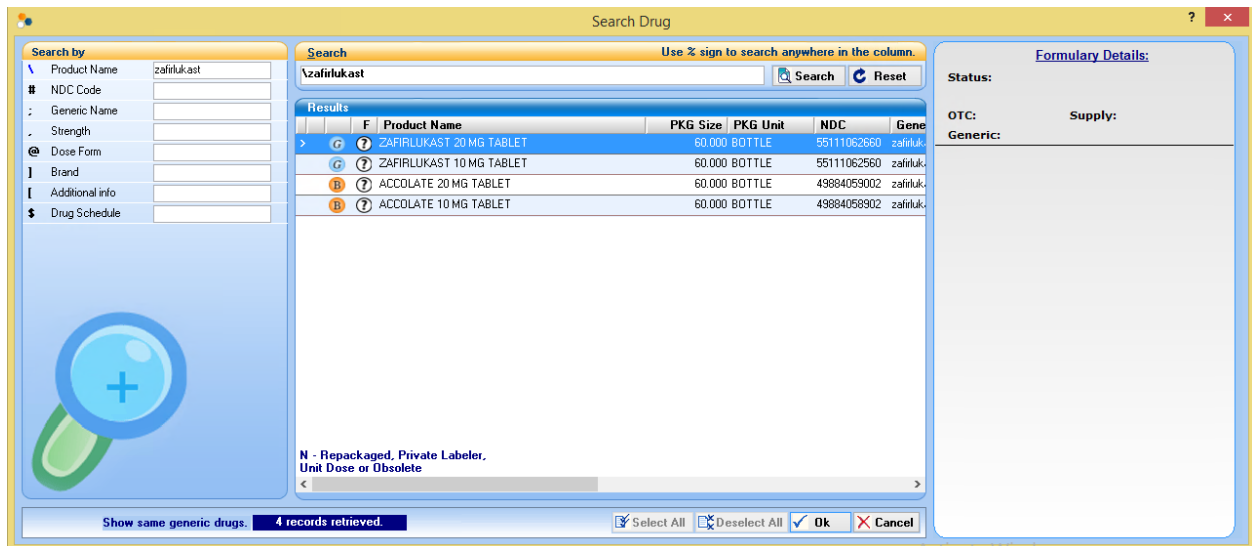


Figure 28 The Search Drug window

10. In the **Search** box of the **Search Drug** window, type the name of the drug that you want to add.

You can also enter the applicable search criteria in the **Search by** pane.


Note:

You can search for a drug using either its generic name or brand names.

If you use the generic name of a drug, all drugs with the same generic name appear in the **Results** pane regardless of the brand.

The G symbol  appears beside the generic name of a drug.

The B symbol  appears beside the brand name of a drug.

You can click the question mark  to view the formulary details of the drug in the **Formulary Details** of the **Drug Search** window.

11. In the **Results** pane, select the applicable drug, and then click **Ok** in the lower pane.

12. In the **SIG** column of the **Add Prescription** window, select the medication instructions on how the patient should take the prescribed drug.

If the instruction does not appear on the list, click the red question mark (?) beside **SIG** to add a specific instruction in the **SIG Selection (Drug Name)** window.

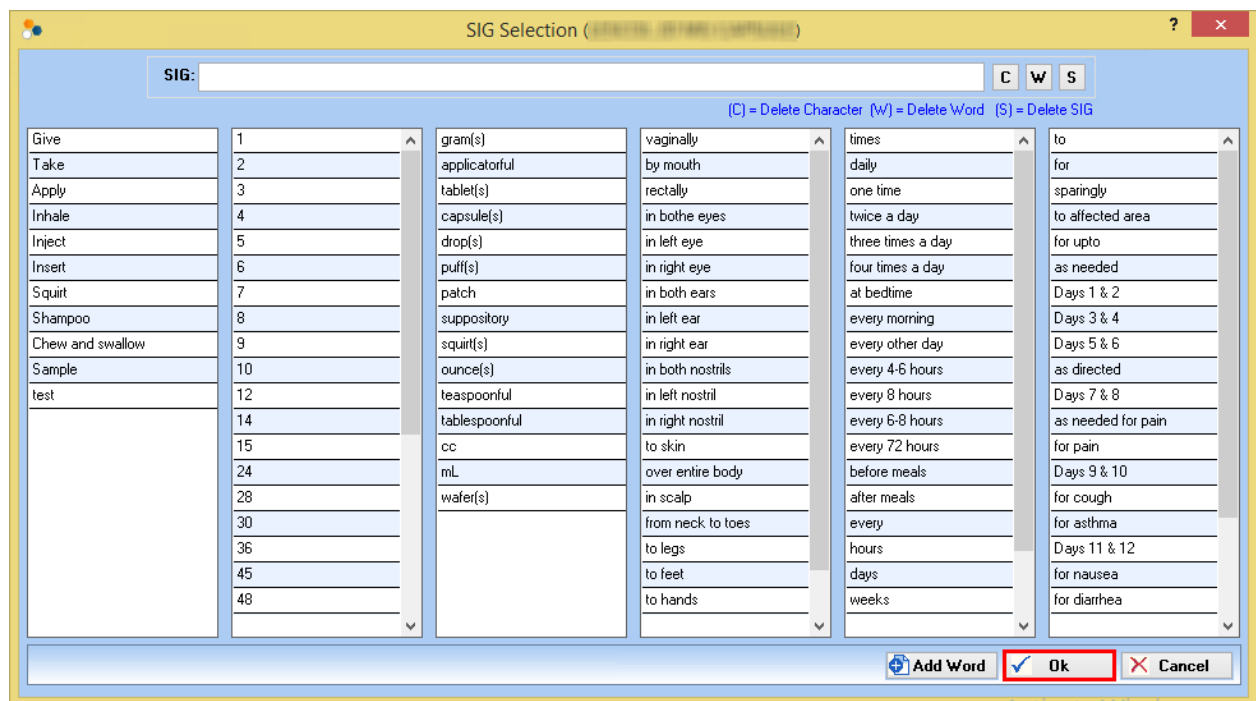


Figure 29 In the **SIG Selection (Drug Name)** window, click the applicable words, numbers, or phrase to specify the instructions on how the patients should take the prescribed medication, and then click **Ok**.

- **SIG Selection (Drug Name)**. In the **SIG Selection (Drug Name)** window, click the applicable words, numbers, or phrases to specify the instructions on how patients should take the prescribed medication, and then click **Ok**.

13. Enter the other necessary information in the applicable sections.

Note:

If you want to delete a prescription, select a row in the center pane of **Add Prescription**, and then click **Delete Row** in the lower pane. When the “Are you sure you want to delete this row?” message appears, click **Yes**.

You cannot delete a drug from a template.

14. In the lower pane of the **Add Prescription** window, you can click the following:

- **Save and Send**. Click **Save and Send** if you want to send the prescription request to the pharmacy.

Note:

When you click **Save and send**, the **e-Prescription Validation(s)** window appears.

For drugs with the generic name Buprenorphine, the applicable provider should have a Narcotic Addiction DEA Number (NADEAN). Otherwise, click the **Fix Error** button beside the **NADEAN Number for provider Provider Name is required for dispensing Buprenorphine, Suboxone, or Subutex** error message to edit the prescription in the **Prescription** screen.

Click the **Fix Error** button to edit errors in the prescription.

Click **Skip & Save** to skip fixing the errors and save the prescription request.

Click **Skip & Send** to skip fixing the errors and send the prescription request.

For pharmacies that do not have the Surescripts service enabled, the system displays **Skip & Fax**, which you can select to skip fixing the errors and fax the prescription request to the pharmacy.

- **Save**. Click **Save** if you want to add the prescription in the **Prescription** window without sending a request to the pharmacy.



Note:


You can send the saved prescriptions in the **Prescription** window.

View a prescription history

After you create or edit a prescription, you can view and monitor the changes made in the records.

To view a prescription history, follow these steps:

1. On the IMS menu bar, click **Activities**, and then click **Prescription**.
2. In the right pane of the **Prescription** screen, click the **History** symbol .
3. When the **Prescription History** window opens, click the expand symbol  for the applicable prescription.
4. In the **Action** column, view the type of changes that are made in the prescription.

When the information symbol  appears next to the **Action** column, click the symbol to view the details of the changes.

5. In the **Action Date** column, view the date when the changes are made.
6. In the **Action By** column, view the name of the user who made the changes.

Note:

Click the collapse symbol  to hide the details of the prescription.

7. In the lower pane, click **Expand All** to view the details of all prescriptions, and then click **Collapse All** to hide details of all prescriptions.

Note:

A drug name in red text indicates a discontinued drug.

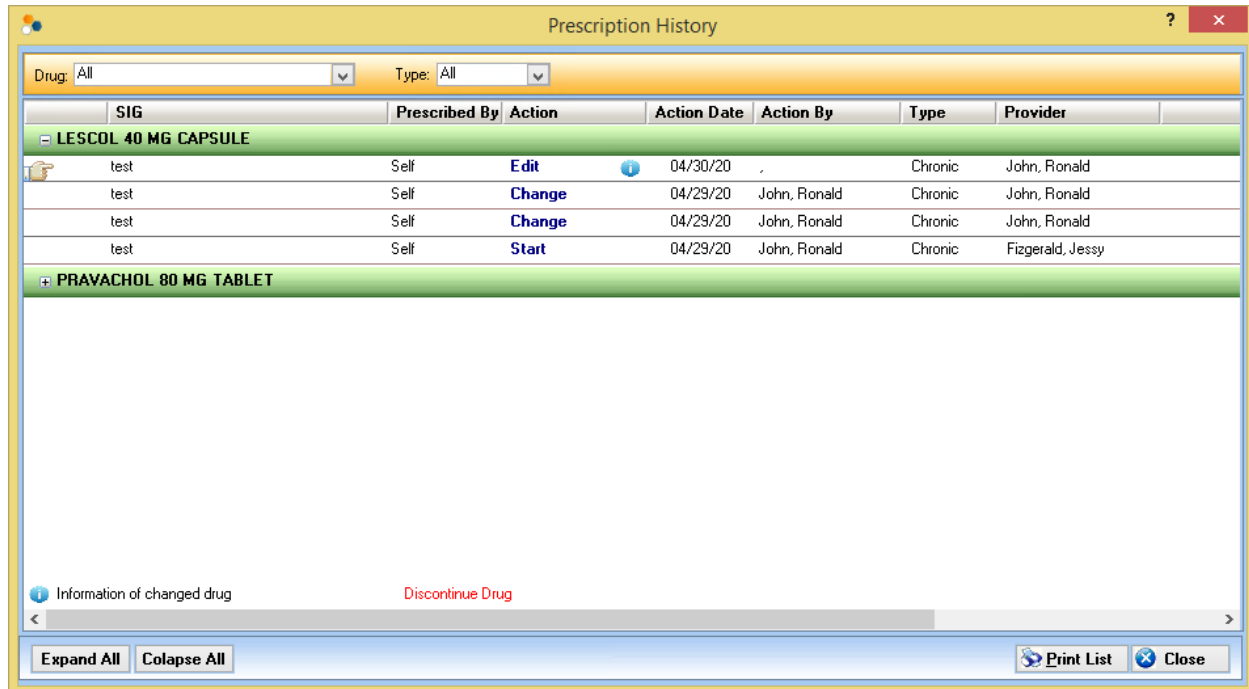


Figure 30 View the changes that you make in a prescription in the Prescription History window.

Get the consent to view the patient’s medication history

To view the medication history of a patient, it is necessary to have his or her consent. You can also get the patient’s consent while the Prescription window is open.

To get the consent, follow these steps:

1. On the IMS menu bar, click **Activities**, and then click **Visit Note**.

2. In the left pane of **Visit Note**, click **Prescription**.
3. In the lower pane of the **Prescription** window, click **Allow Edit**.
4. In the center pane of the **Prescription** window, click the applicable row.
5. On the blue bar of **Prescription** window, click **Surescripts Rx History**.

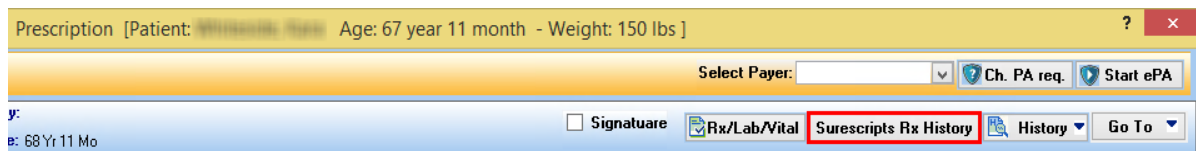


Figure 31 On the blue bar of **Prescription** window, click **Surescripts Rx History** to show the consent confirmation message.

6. When the “Patient consent is not given for external medication history information. Would you like to set the patient consent to “Consent Given”?” validation message appears, click **Yes**.



Figure 32 The confirmation message that appears when you click **Surescripts Rx History**


Set the prescription fill indicator status

You can set the status of a prescription fill indicator from the **Rx Fill Indicators** window.

Note:

You can also set the prescription fill indicator status on the **Visit Note** screen.

To set the status of a prescription fill indicator, follow these steps:

1. On the IMS menu bar, click **Utilities**, point to **Patient**, and then click **Prescription**.
2. On the gold bar of the **Prescription** window, click the red question mark (?) beside **Patient**.
3. In the **Search Patient** window, search for and select a patient, and then click **Ok**.
4. In right pane of the **Prescription** window, click the **RxFill Indicator** symbol  for the applicable prescription.

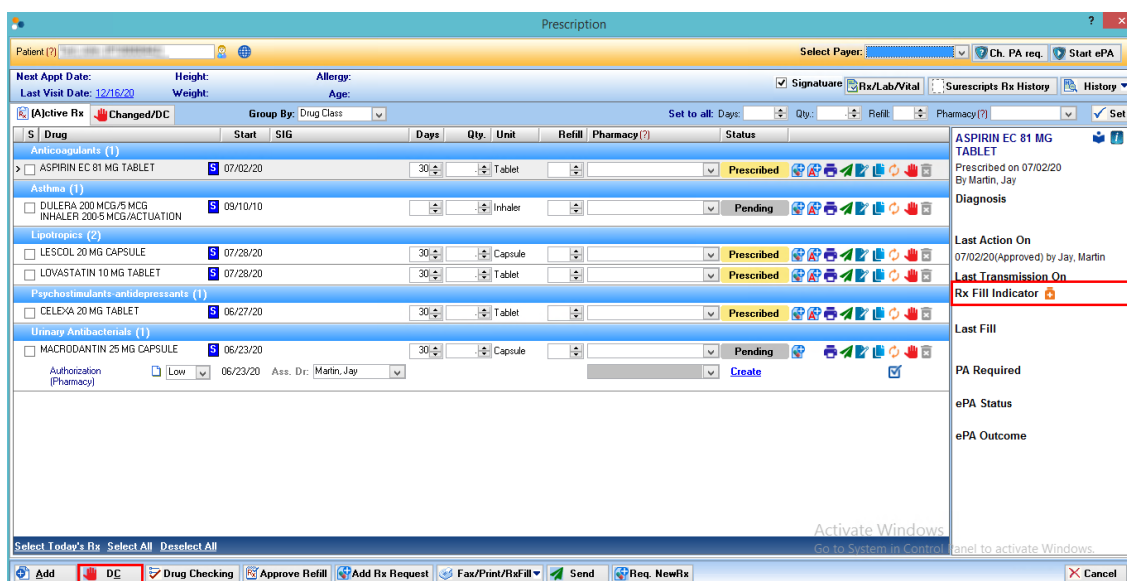


Figure 33 In the right pane of the **Prescription** window, click the **RxFill Indicator** symbol to open the **Rx Fill Indicators** window.

5. In the **Rx Fill Indicators** window, select the applicable status, and then click **Ok**.

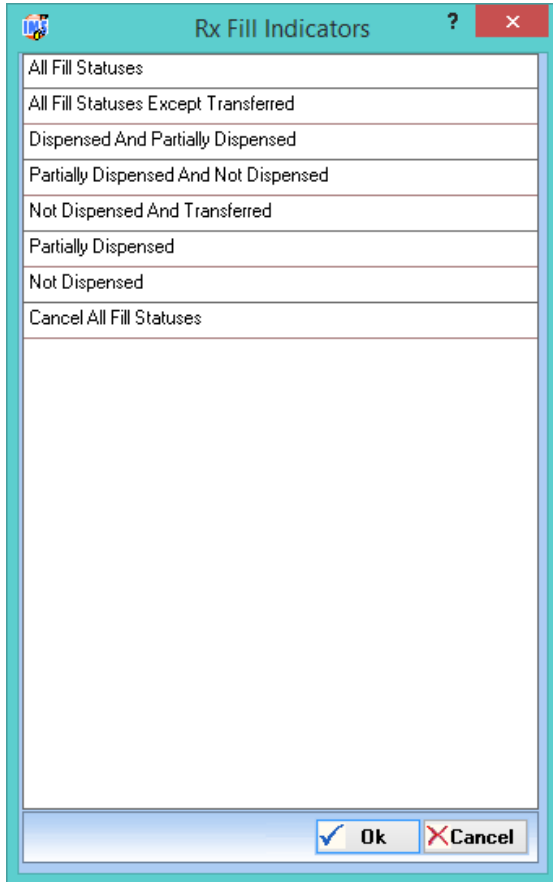



Figure 34 The Rx Fill Indicators window

Note:

In the **Prescription** window, the status of the prescription fill indicator appears in the right pane.

The **RxFill Indicator** symbol  is also available in the **Approve Rx Renewal** window.

To set the default Rx Fill Indicator value, click **Setup > User Parameters > Default Rx Fill Indicator Value for e-Prescription (Prescription)**.

For more details about the default Rx Fill Indicator, see “Prescription Setup” in the *Prescription Setup User Guide*.



Discontinue a patient's prescription

It is necessary to discontinue a prescription when it is no longer prescribed for the patient.

Note:

You can also discontinue a patient's prescription on the **Visit Note** screen.

To discontinue a prescription, follow these steps:

1. On the IMS menu bar, click **Utilities**, point to **Patient**, and then click **Prescription**.
2. On the gold bar of the **Prescription** window, click the red question mark  beside **Patient**.
3. In the **Search Patient** window, search for and select a patient, and then click **Ok**.
4. In the center pane of the **Prescription** window, click the **Discontinue** symbol  within the row of the applicable drug.

Note:

To discontinue multiple drugs at once, select the **S** check box for the applicable prescription, and then click **DC** in the lower pane.

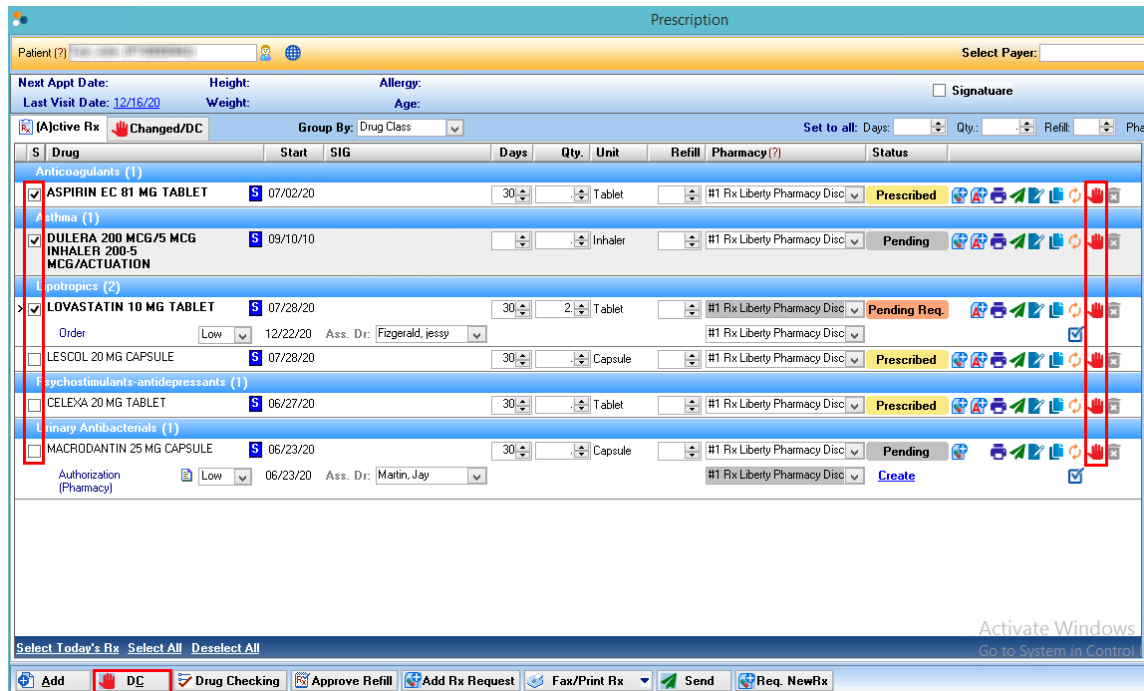


Figure 35 In the Prescription window, click the Discontinue symbol within the row of the applicable drug. To discontinue multiple prescriptions at once, select the applicable S check boxes, and then click DC in the lower pane.

5. In the Discontinue window, enter the applicable details, and then click any of the following:
 - **DC & eSend.** Click DC & eSend to discontinue the selected prescription, and then electronically send it to the pharmacy.
 - **DC.** Click DC to discontinue the selected prescription.
 - **Cancel.** Click Cancel to cancel the changes.



Note:

Click the Changed/DC tab to view the changed and discontinued prescriptions.

Recontinue a discontinued prescription

You can recontinue a discontinued prescription in the **Changed/DC** tab.

To recontinue a discontinued prescription, follow these steps:

1. On the IMS menu bar, click **Utilities**, point to **Patient**, and then click **Prescription**.
2. On the gold bar of the **Prescription** window, click the red question mark  beside **Patient**.
3. In the **Search Patient** window, search for and select a patient, and then click **Ok**.
4. Click the **DC/Changed** tab, and then select the applicable prescription in the center pane.
5. Right-click the row of the selected prescription, and then select any of the following:
 - **Create New**. Click the **Create New** symbol  to create a new prescription.
 - **Recontinue** or **Create New**. Right-click the applicable drug, and then select **Recontinue** to recontinue a discontinued prescription or **Create New** to create a new prescription.

Note:

Recontinue is applicable only to discontinued drugs that are discontinued on the current day.

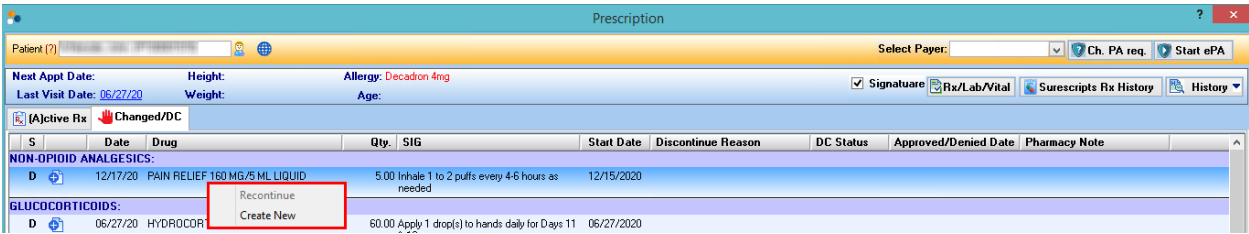


Figure 36 Right-click the applicable drug, and then select **Recontinue** to recontinue a discontinued drug or select **Create New** to create a new prescription.


Note:

You can also access the same **Changed/DC** tab in the Visit Note. To do this, click **Visit Note > Prescription > Changed/DC**.

Fix prescription errors in the e-Prescription Validation window

A validation message appears when you electronically send a prescription that has an error. You can fix the errors through the **e-Prescription Validation** window before you electronically send a prescription.

To fix prescription errors, follow these steps:

1. On the IMS menu bar, click **Utilities**, point to **Patient**, and then click **Prescription**.
2. On the gold bar of the **Prescription** window, click the red question mark  beside **Patient**.
3. In the **Search Patient** window, search for and select a patient, and then click **Ok**.
4. In the **Prescription** window, select the applicable check box in the **S** column of the prescription.

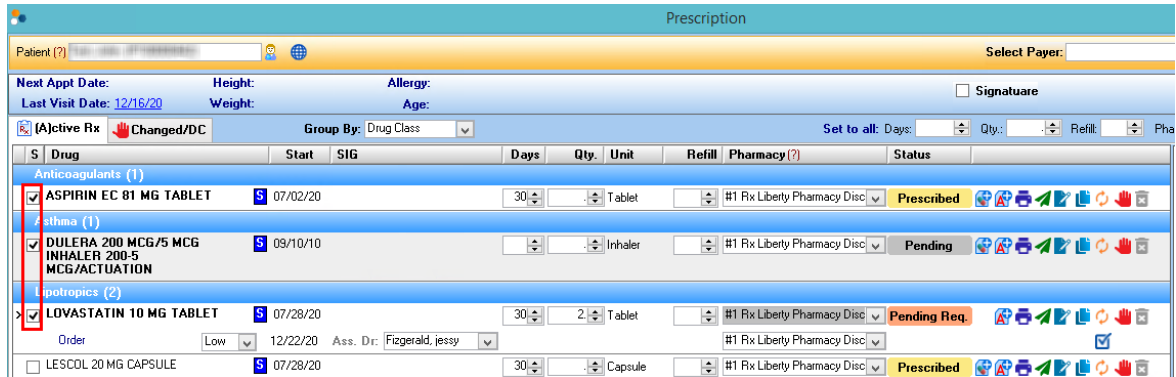



Figure 37 In the Prescription window, select the S check box in the for the prescription that you want to send electronically.

5. After you select the applicable prescription, do any of the following:
 - Click the **Approve & Send** symbol  in the corresponding row of the selected prescription.
 - In the lower pane, click **Send**.
 - In the lower pane, click **Fax/Print/RxFill**, and then select **eSend RxFill**.
6. In the **Approve Rx Renewal** window, click **Approve & Send**.

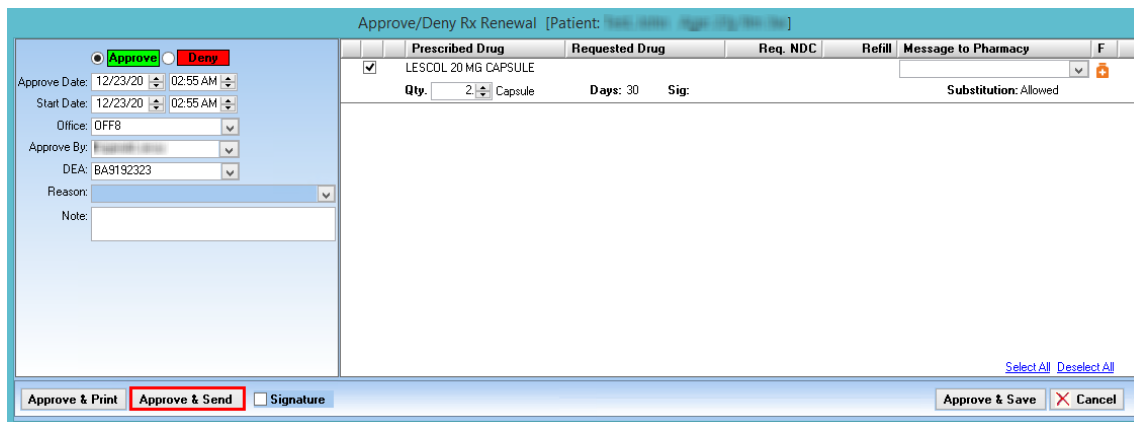


Figure 38 In the Approve Rx Renewal window, click Approve & Send.

- In the **e-Prescription Validation** window, click **Fix Error** for the necessary prescription error.

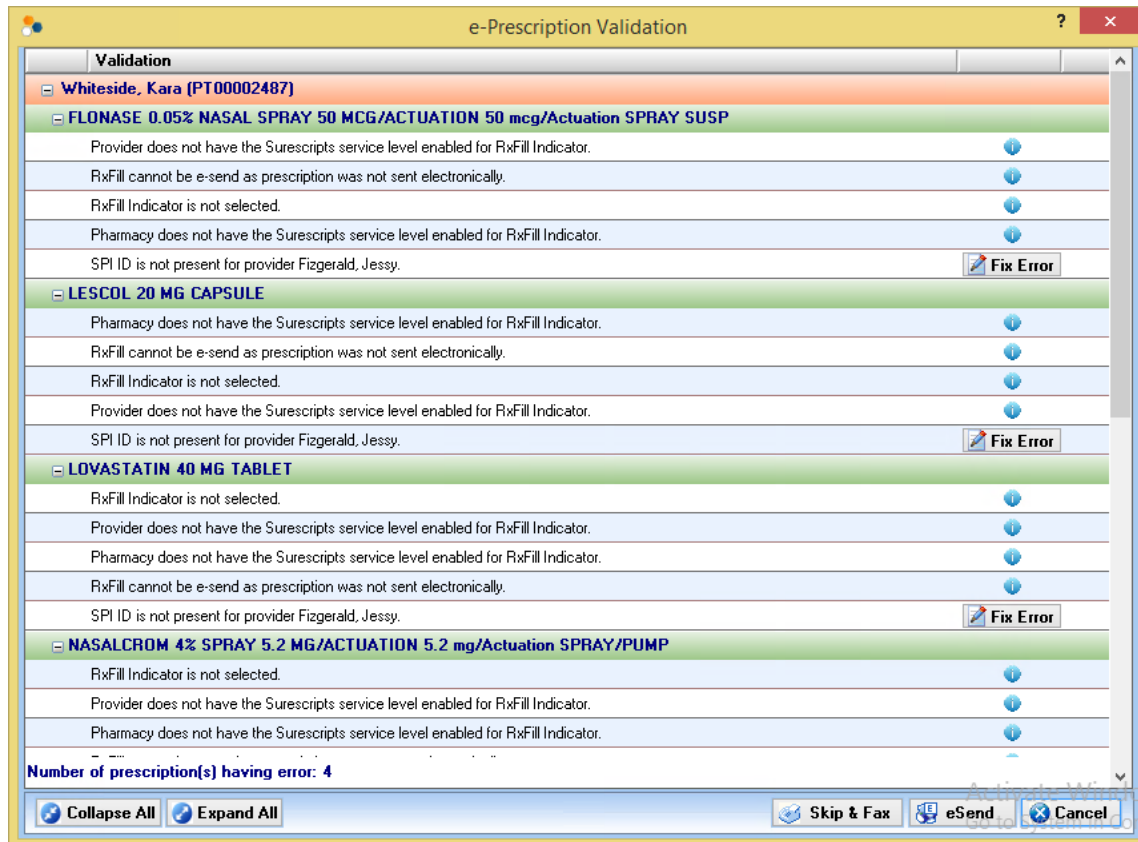


Figure 39 The e-Prescription Validation window

- When the applicable screen or window opens, fix the necessary error.

Note:

Errors that have been fixed no longer appear in the **e-Prescription Validation** window.


If the ePrescription validations cannot be fixed, click **Skip & Fax** and the system sends the prescription request through fax.

If you select **Skip & Fax**, only the prescriptions with errors will be sent via fax. The rest of the prescriptions will be sent as electronic requests.


Enter details in the Supply Item Details window



It is necessary to select **Supply Item** from the **CD/SI** list when you add or edit a prescription to enter the supply item details for a drug.

To enter the details for a drug, follow these steps:

1. On the IMS menu bar, click **Activities**, and then click **Prescription**.
2. Click the **Add** symbol  in the action toolbar.

Note:

Select the **Edit** symbol  on the action toolbar if you want to edit a drug from a template in the left pane of the **Prescription** screen.

3. Click the red question mark  beside **Drug** to open the **Search Drug** window.
4. In the **Search Drug** window, search for and select a drug, and then click **Ok**.
5. In the center pane of **Prescription** screen, select **Supply Item** from the **CD/SI** list, and then click the **Supply Item** symbol .

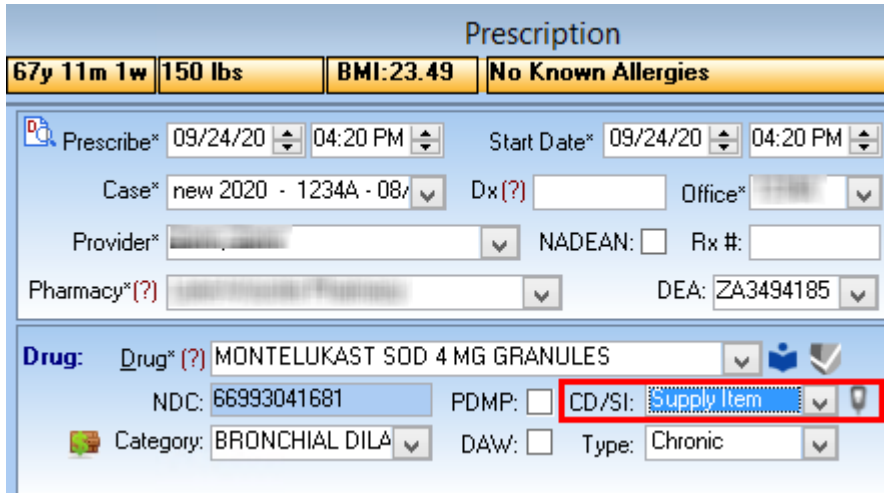


Figure 40 In the **Prescription** screen, select **Supply Item** from the **CD/SI** list, and then click the **Supply Item** symbol to open the **Supply Item Details** window.

6. In the **Supply Item Details** window, enter the applicable details, and then click **Ok**.

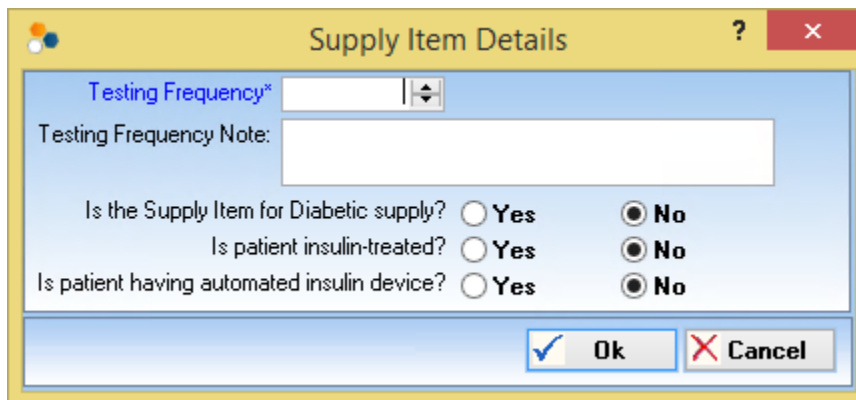



Figure 41 The **Supply Item Details** window

Note:


When you save a prescription that you set as a supply item without adding the supply item details, the “Additional Details for the supply items are required in the prescription to electronically send the prescription. Would you like to enter the additional supply item details?” message appears. Click **Yes** to enter details in the **Supply Item Details** window.

7. In the **Prescription** screen, enter the applicable details, and then click the **Save** symbol  on the action toolbar.

Indicate that a drug is prescribed by another provider in the Prescription screen

When you prescribe a drug to a patient, you can indicate whether the drug is prescribed by yourself or another provider using the **By** list. From the list, the system selects **Self** by default, but you can also select **Other MD** to indicate that the drug is prescribed by another provider.

To indicate that the drug is prescribed by another provider, follow these steps:

1. On the IMS menu bar, click **Activities**, and then click **Prescription**.
2. In the **Search Patient** window, search for and select a patient, and then click **Ok**.
3. On the action toolbar of the **Prescription** screen, click the **Add** symbol .
4. In the **Prescription** screen, enter the necessary details, and then select **Other MD** from the **By** list.

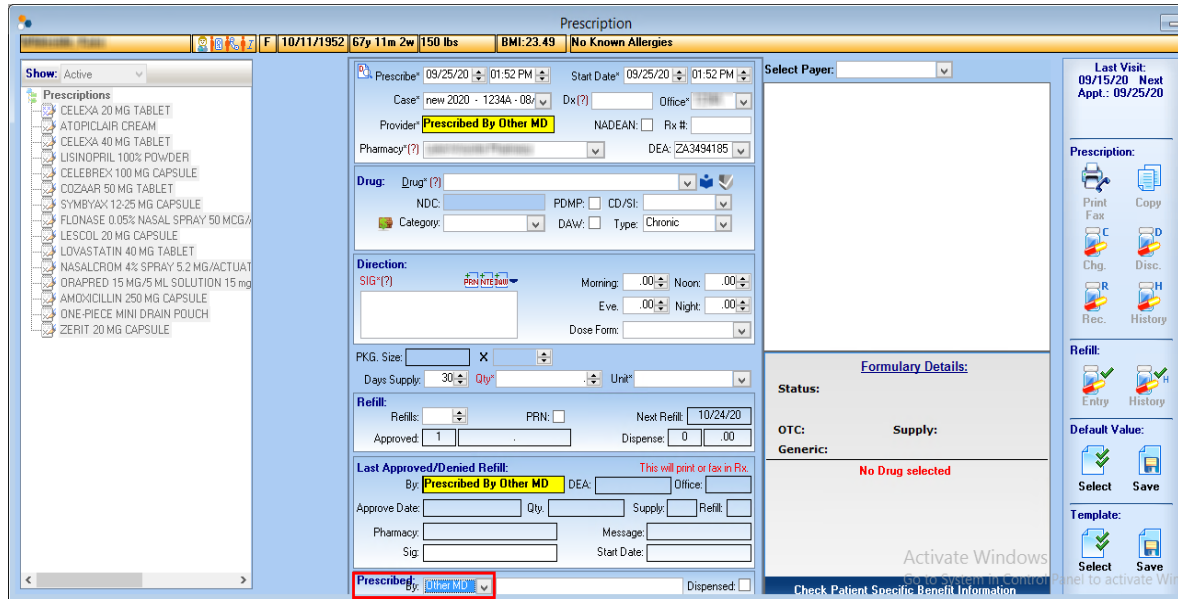


Figure 42 In the Prescription screen, enter the necessary details, and then select **Other MD** from the **By** list to indicate that the drug is prescribed by another provider.

Note:

To specify the applicable provider, type the name of the provider in the box beside the **By** list.

5. In the right pane, click **Save**.

Indicate that a drug is prescribed by another provider in the Prescription window

You can also indicate that the drug is prescribed by another provider in the **Add Prescription** window.

To indicate that the drug is prescribed by another provider in **Add Prescription**, follow these steps:

1. On the IMS menu bar, click **Utilities**, point to **Patient**, and then select **Prescription**.
2. In the **Prescription** window, click **Add** in the lower pane.
3. In the **Add Prescription** window, click **Add Row**.
4. Click the red question mark (?) beside **Drug**.
6. In the **Search Drug** window, search for and select the applicable drug, and then click **Ok**.
7. In the center pane of **Add Prescription**, select **Other MD** from the **Rx By** list.
8. In the lower pane, click **Save**.

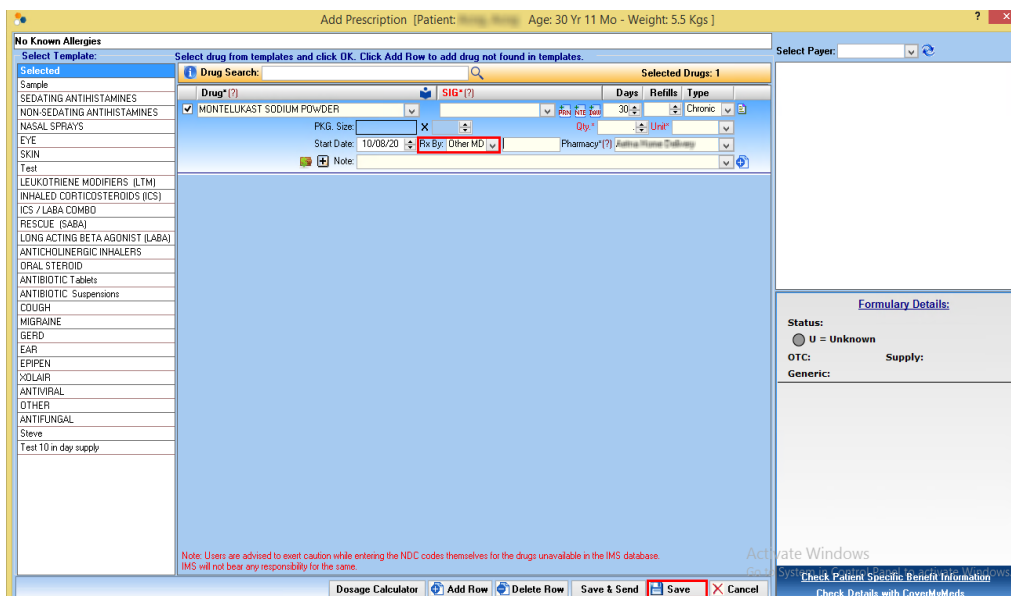


Figure 43 In the **Add Prescription** window, select **Other MD** in the **Rx By** list, and then click **Save** in the lower pane.

Note:

To specify the applicable provider, type the name of the provider in the box to the right of the **Rx By** list.

When you approve a refill from a prescription that is prescribed by another provider, the “Following drugs are prescribed by Other MD: 1. *Name of drug*. Are you sure you want to continue?” message appears.

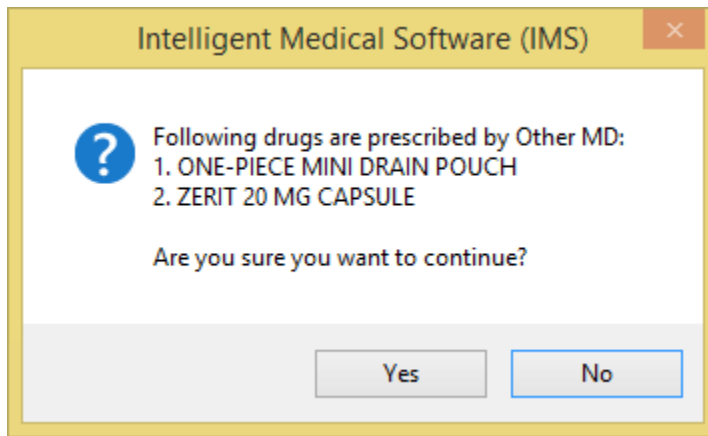


Figure 44 The message that appears when you approve a refill for a prescription that is prescribed by another provider

Set up text and email notifications

In the **Setup Center** window, you can set up the text and email notifications that the patients receive.

To set up the text and email notifications, click **Setup > Admin > double-click Text/Email Templates**.

For more details about the text and email notifications setup, see “Prescription Setup” in the *Prescription Setup User Guide*.

Set up the text and email templates

In **Setup Center**, you can set up the templates for the text and email notification that you send to the patients.

To set up the text and email templates, click **Setup > Other > Letter Template > select Text/Email > click Prescription or Prescription Request**.

For more details about the text and email templates setup, see “Prescription Setup” in the *Prescription Setup User Guide*.

Types of Prescription Change Requests

If a drug prescribed for a patient is not available in the pharmacy, the pharmacy asks for the provider’s approval to change the drug or suggests an alternative drug. The pharmacy can also send prescription change requests to clarify some information about the patient’s prescription or from the provider.

To view the prescription change requests from the pharmacy, click **Utilities**, point to **Patient**, and then click **Prescription**. In the **Drug** column of the **(A)ctive Rx** tab, you can view the type of prescription request below the drug name. Change requests are labeled as **Change (Requester)**.

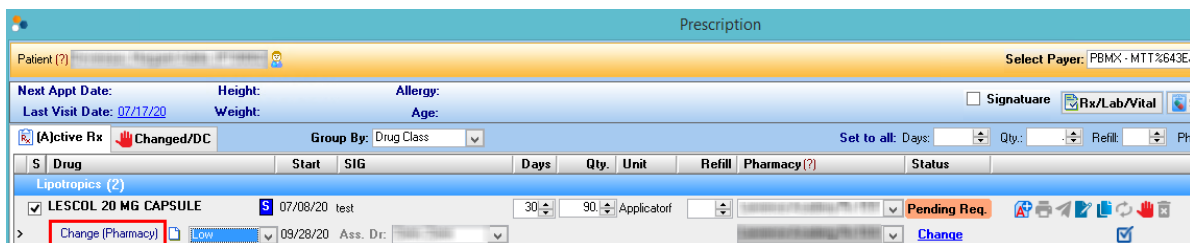


Figure 45 In the **Drug** column of the **(A)ctive Rx** tab, you can view the type of prescription request below the drug name

For pending change requests, click **Change** in the **Status** column to open the **Change Prescription** window and enter the changes.

Note:

Once the changes are entered and you select **Save** in the **Change Prescription** window, the request type changes to Order in the **(A)ctive Rx** tab.

If you select **Save & Send** in the **Change Prescription** window, the system sends the Change request without changing the request type to Order in the **(A)ctive Rx** tab.

The types of prescription change requests that appear in IMS are the following:

- **Generic Substitution.** In **Generic Substitution**, the pharmacy sends the substitute drug and the provider selects the drug as a substitute for the drug that is not available.

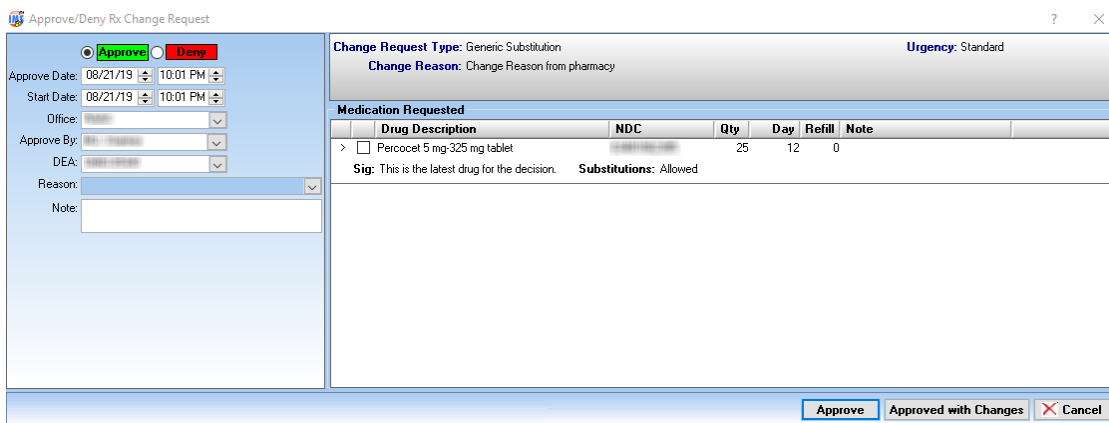
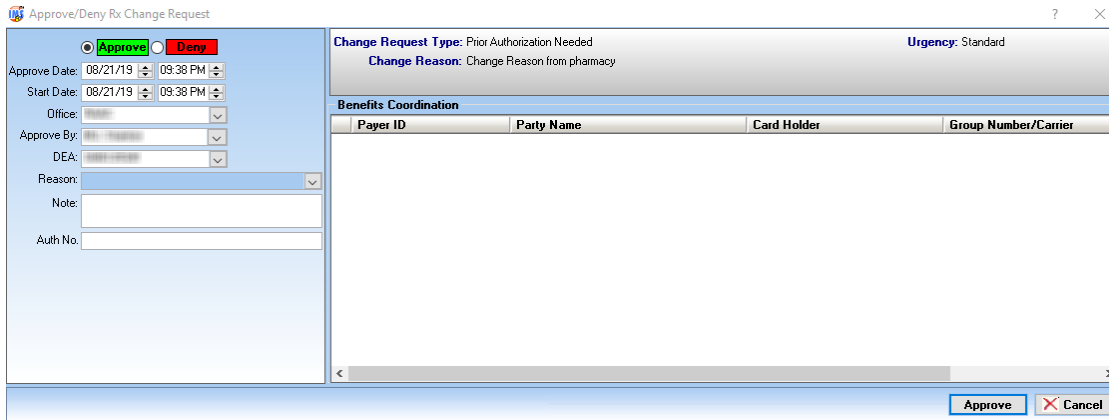


Figure 46 The Generic Substitution type of prescription change request in the Approve/Deny RX Change Request window

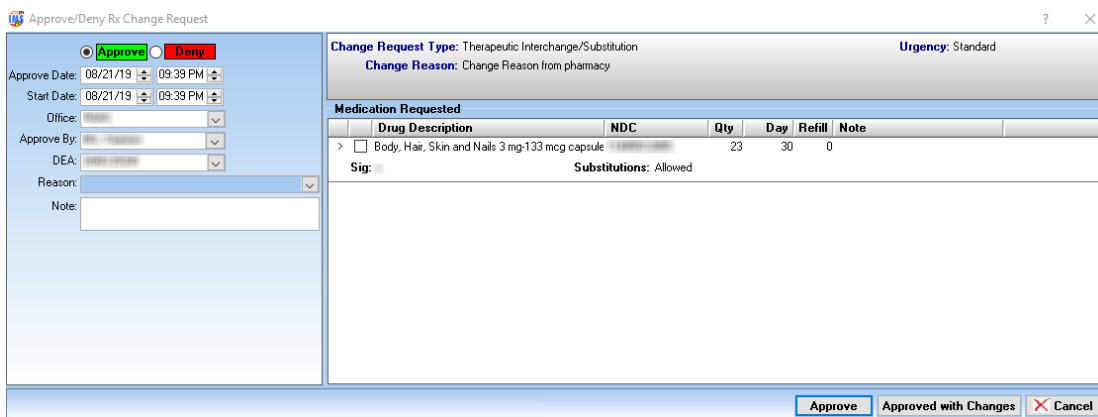
- **Prior Authorization Needed.** In **Prior Authorization Needed**, the pharmacy sends a prescription change request if prior authorization is needed from the provider. The prescription change request also requires the applicable authorization number.



The screenshot shows the 'Approve/Deny Rx Change Request' window. On the left, there are fields for 'Approve Date', 'Start Date', 'Office', 'Approve By', 'DEA', 'Reason', 'Note', and 'Auth No.'. The 'Approve' button is highlighted in green. The main area shows 'Change Request Type: Prior Authorization Needed' and 'Urgency: Standard'. Below this is a 'Benefits Coordination' table with columns: Payer ID, Party Name, Card Holder, and Group Number/Carrier. The table is currently empty. At the bottom right, there are 'Approve' and 'Cancel' buttons.

Figure 47 The Prior Authorization Needed type of prescription change request in the Approve/Deny RX Change Request window

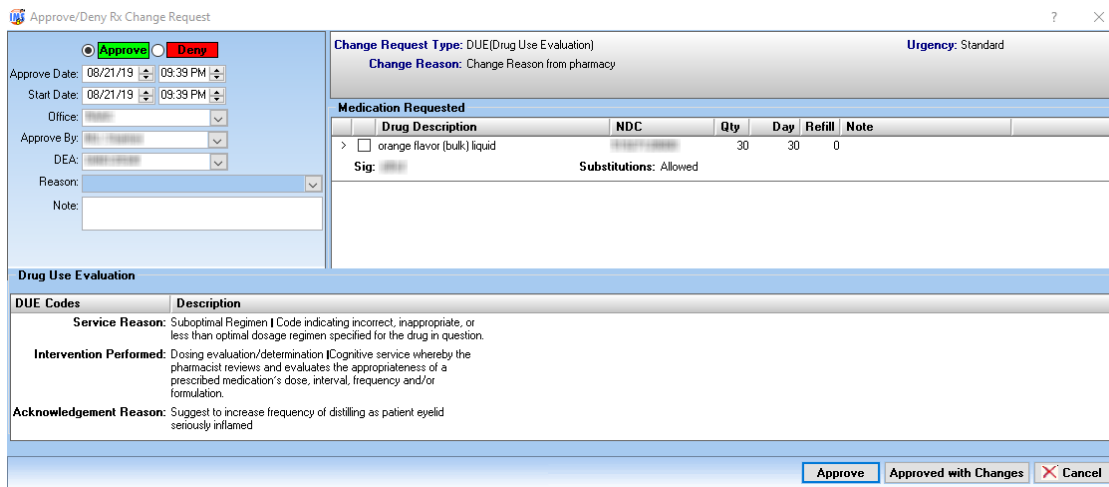
- **Therapeutic Interchange/Substitution.** In Therapeutic Interchange/Substitution, the pharmacy sends the alternative therapeutic drugs to be approved by the provider for the applicable prescription change request.



The screenshot shows the 'Approve/Deny Rx Change Request' window. On the left, there are fields for 'Approve Date', 'Start Date', 'Office', 'Approve By', 'DEA', 'Reason', 'Note', and 'Auth No.'. The 'Approve' button is highlighted in green. The main area shows 'Change Request Type: Therapeutic Interchange/Substitution' and 'Urgency: Standard'. Below this is a 'Medication Requested' table with columns: Drug Description, NDC, Qty, Day, Refill, and Note. The table contains one entry: 'Body, Hair, Skin and Nails 3 mg-133 mcg capsule' with NDC, Qty (23), Day (30), and Refill (0). Below the table, it says 'Substitutions: Allowed'. At the bottom right, there are 'Approve', 'Approved with Changes', and 'Cancel' buttons.

Figure 48 The Therapeutic Interchange/Substitution type of prescription change request in the Approve/Deny RX Change Request window

- **DUE(Drug Use Evaluation).** In DUE(Drug Use Evaluation), the pharmacy sends reasons why the drug is not appropriate for the patient.



Approve/Deny Rx Change Request

Change Request Type: DUE (Drug Use Evaluation) Urgency: Standard
Change Reason: Change Reason from pharmacy

Approve: Approve Deny

Approve Date: 08/21/19 09:39 PM
Start Date: 08/21/19 09:39 PM
Office: [Dropdown]
Approve By: [Dropdown]
DEA: [Dropdown]
Reason: [Dropdown]
Note: [Text Area]

Drug Description	NDC	Qty	Day	Refill	Note
> <input type="checkbox"/> orange flavor (bulk) liquid		30	30	0	

Sig: [Text] Substitutions: Allowed

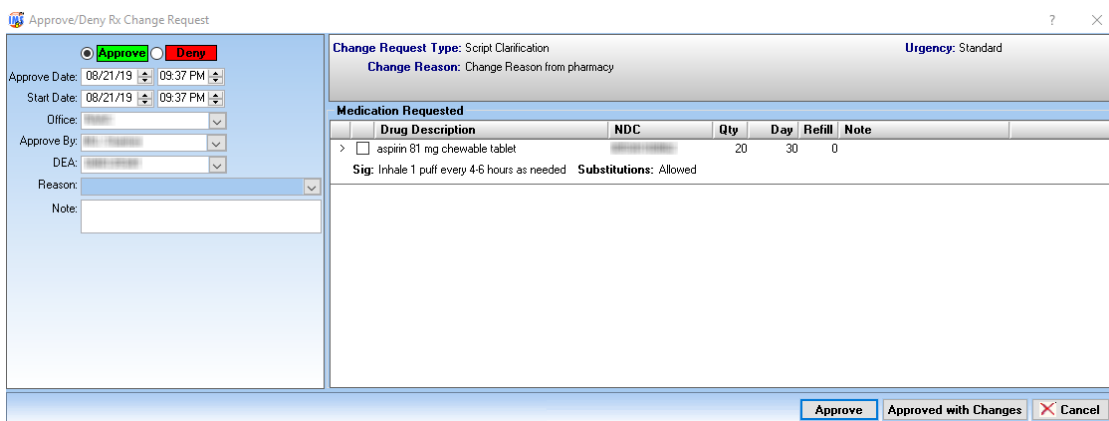
Drug Use Evaluation

DUE Codes	Description
Service Reason:	Suboptimal Regimen Code indicating incorrect, inappropriate, or less than optimal dosage regimen specified for the drug in question.
Intervention Performed:	Dosing evaluation/determination Cognitive service whereby the pharmacist reviews and evaluates the appropriateness of a prescribed medication's dose, interval, frequency and/or formulation.
Acknowledgement Reason:	Suggest to increase frequency of dosing as patient eyelid seriously inflamed

Approve Approved with Changes Cancel

Figure 49 The DUE (Drug Use Evaluation) type of prescription change request in the Approve/Deny RX Change Request window

- **Script Clarification.** In Script Clarification, the pharmacy sends a request to clarify some necessary information from the patient's prescription.



Approve/Deny Rx Change Request

Change Request Type: Script Clarification Urgency: Standard
Change Reason: Change Reason from pharmacy

Approve: Approve Deny

Approve Date: 08/21/19 09:37 PM
Start Date: 08/21/19 09:37 PM
Office: [Dropdown]
Approve By: [Dropdown]
DEA: [Dropdown]
Reason: [Dropdown]
Note: [Text Area]

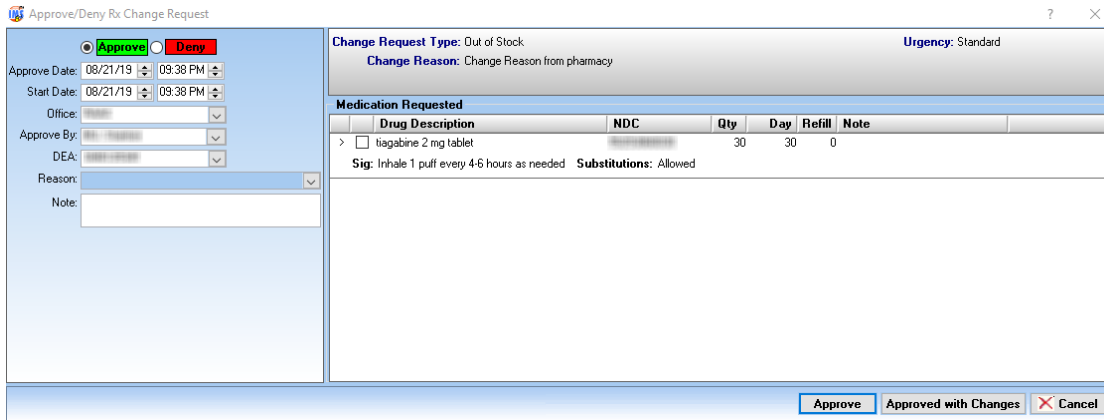
Drug Description	NDC	Qty	Day	Refill	Note
> <input type="checkbox"/> aspirin 81 mg chewable tablet		20	30	0	

Sig: Inhale 1 puff every 4-6 hours as needed Substitutions: Allowed

Approve Approved with Changes Cancel

Figure 50 The Script Clarification type of prescription change request in the Approve/Deny RX Change Request window

- **Out of Stock.** In Out of Stock, the pharmacy notifies the provider that the drug prescribed for the patient is out of stock and sends an alternative drug for the patient.



Approve/Deny Rx Change Request

Change Request Type: Out of Stock Urgency: Standard

Change Reason: Change Reason from pharmacy

Medication Requested

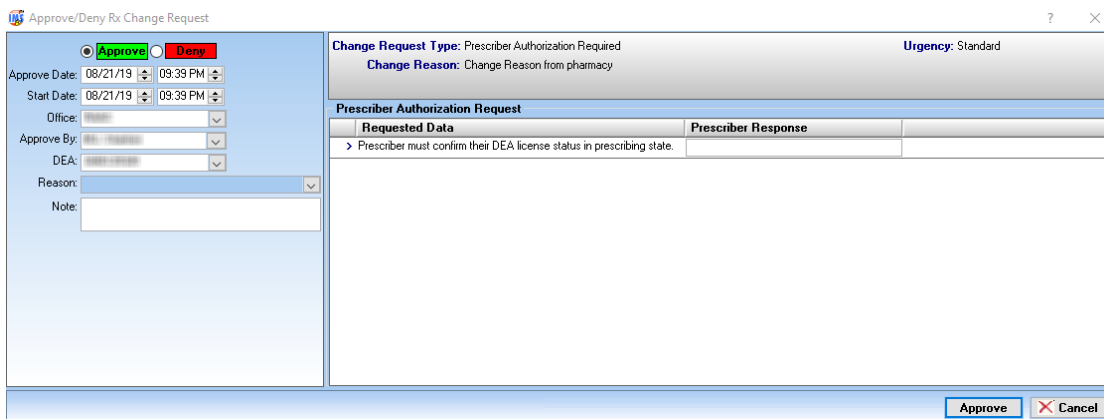
Drug Description	NDC	Qty	Day	Refill	Note
> <input type="checkbox"/> tiagabine 2 mg tablet		30	30	0	

Sig: Inhale 1 puff every 4-6 hours as needed Substitutions: Allowed

Buttons: Approve, Approved with Changes, Cancel

Figure 51 The Out of Stock type of prescription change request in the Approve/Deny RX Change Request window

- **Prescriber Authorization Required.** In Prescriber Authorization Required, the prescription change request is sent if some important information from the provider is required.



Approve/Deny Rx Change Request

Change Request Type: Prescriber Authorization Required Urgency: Standard

Change Reason: Change Reason from pharmacy

Prescriber Authorization Request

Requested Data	Prescriber Response
> Prescriber must confirm their DEA license status in prescribing state.	

Buttons: Approve, Cancel

Figure 52 The Prescriber Authorization Required type of prescription change request in the Approve/Deny RX Change Request window

Reassigned NDCs


When a drug is discontinued by the drug manufacturer, the National Drug Code (NDC) number of that drug is reassigned to another drug. Clinics and pharmacies

can no longer edit, change, copy, or electronically send prescriptions that contain discontinued drugs that have their NDCs reassigned to another drug. You also cannot approve refills for these drugs. The pharmacies and clinics, however, can still cancel prescriptions that contain discontinued drugs.

NDC has been reassigned to some other Drug/Product appears for the discontinued drugs in the following:

- **Prescription Template** screen
- **Add Prescription** window
- **Link with *Template*** window
- **Prescription** screen
- **Default Value of Prescription** screen

Note:

In the **Add Prescription** and **Link with *Template*** windows, the note appears when you point to the **R** symbol  in the leftmost column of the upper-right pane.

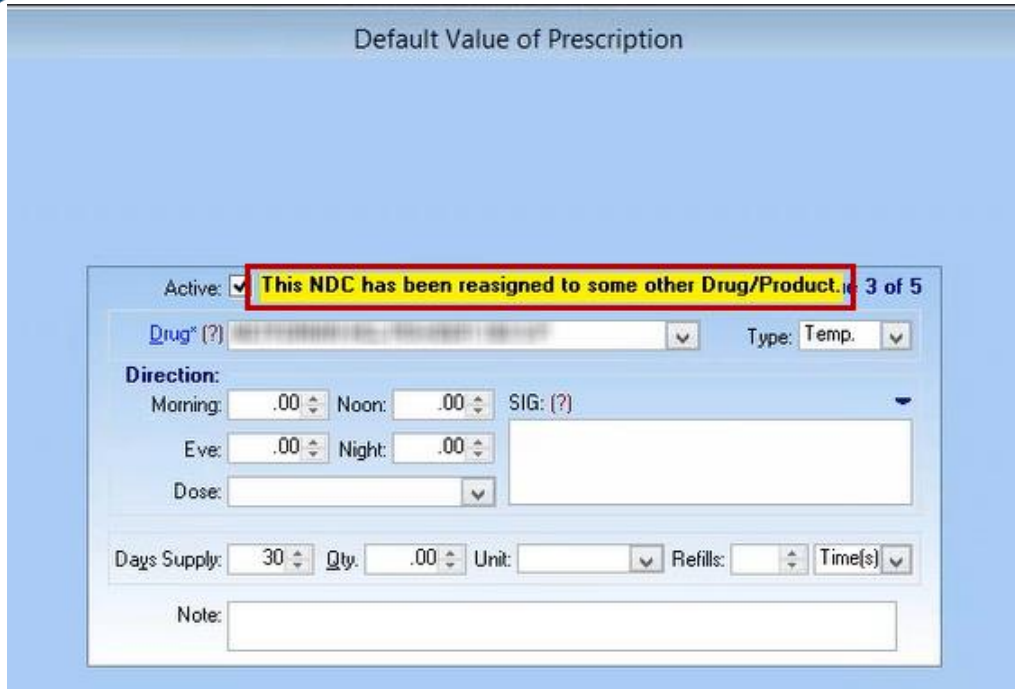


Figure 53 The note that appears for discontinued drugs that have their NDCs assigned to another drug

If you try to edit, change, copy, electronically send, or approve refills of prescriptions with discontinued drugs, the system shows a message that informs you that the drug has been discontinued by the drug manufacturer.

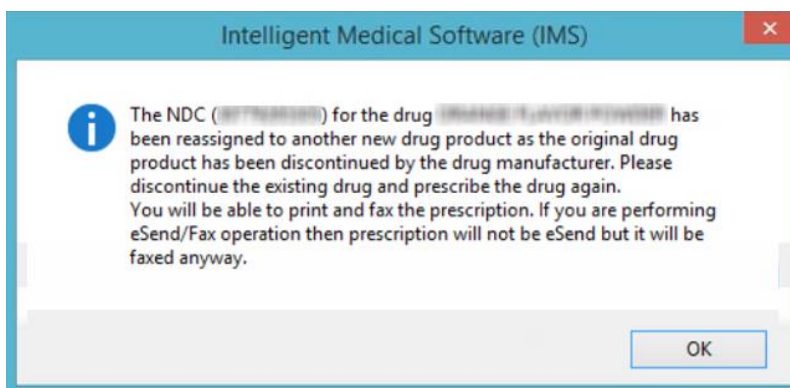



Figure 54 The alert message that appears when you edit, change, copy, electronically send, or approve refills of prescriptions with discontinued drugs

Statewise Drug Schedules of Controlled Substances

A drug can have different drug schedules depending on the state where they are sold. In IMS, the drug schedule of a drug changes depending on the state where the pharmacy that sells the drug is located.

View the drug schedule of a drug on the Prescription screen

To view the drug schedule on the **Prescription** screen, follow these steps:

1. On the IMS menu bar, click **Activities**, and then click **Prescription**.
2. In the **Search Patient** window, search for and select the applicable patient, and then click **Ok**.
3. In the left pane of the **Prescription** screen, select the applicable prescription, and then click the **Edit** symbol  on the action toolbar.
4. In the center pane of **Prescription**, select the applicable pharmacy from the **Pharmacy** list.

You can view each pharmacies' phone and fax numbers in the **Pharmacy** list.

5. When the "The selected pharmacy is not found in the patient's Default Pharmacy or Preferred Pharmacy list. Do you want to set the pharmacy as Default?" message appears, click the applicable option.

Note:

When you select another preferred pharmacy from the **Pharmacy** list, the “Do you want to set this pharmacy to all other prescription(s)?” message appears instead.

6. In the **Drug** section of the **Prescription** screen, view the drug schedule of the drug.

The drug schedule appears above the **CD/SI** list.

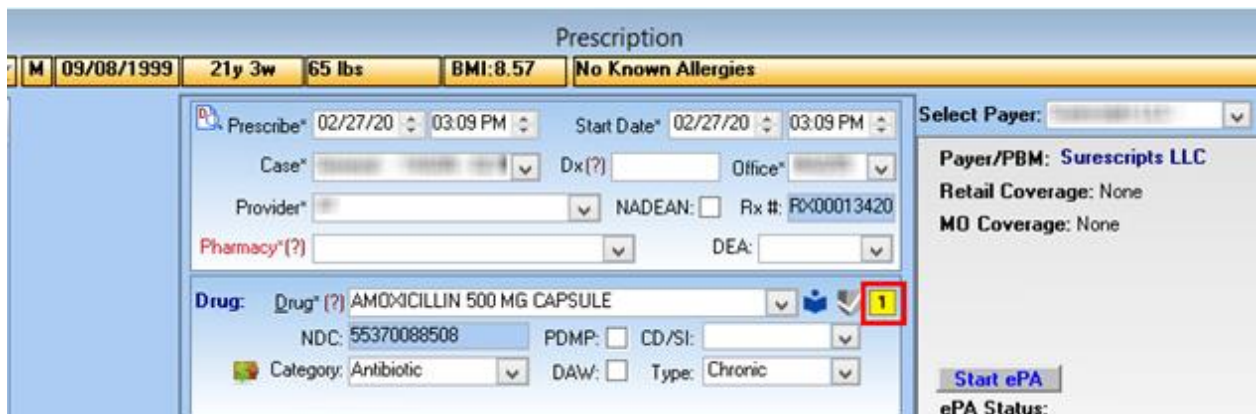


Figure 55 On the Prescription screen, the drug schedule of the drug appears above the CD/SI list.

View the drug schedule of a drug in the Prescription window

To view the drug schedule in the **Prescription** window, follow these steps:

1. On the IMS menu bar, click **Utilities**, point to **Patient**, and then click **Prescription**.
2. In the center pane of the **Prescription** window, select the **S** check box for the applicable row.

- From the list in the **Pharmacy** column, select the pharmacy for the applicable drug.
- In the **Prescription** window, view the drug schedule of the drug.

The drug schedule appears beside the drug name.

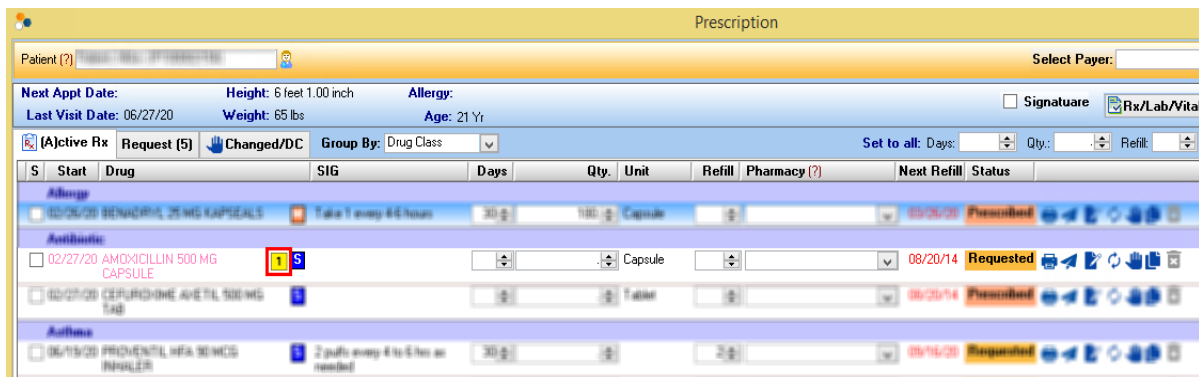


Figure 56 In the Prescription window, the drug schedule appears beside the drug name.

Note:

When you receive a renewal request, the drug schedule that appears in IMS is based on the drug schedule that is sent by the pharmacy.

The system will retrieve the drug schedule from the drug database information if a different drug is received and if the pharmacy did not send a drug schedule.

View the drug schedule of a drug in the Rx Management window

To view the drug schedule in the **Rx Management** window, follow these steps:

- On the IMS menu bar, click **Activities**, and then click **Rx Management**.

2. On the gold bar, enter the applicable search criteria.
3. In the **Request** tab, view the drug schedule in the center pane.

Note:

You can also view the drug schedule in the **Scheduled Rx** tab.

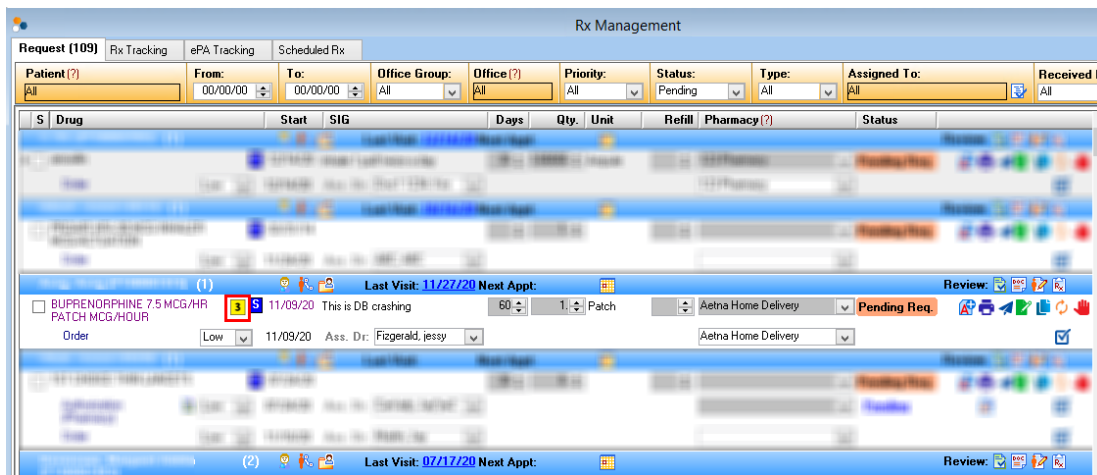



Figure 57 In the Rx Management window, the drug schedule appears on the right side of the drug name.

Electronically send unit-dose, private label, repackaged, or obsolete drugs

Surescripts allows you to electronically send only the drugs with representative NDCs.

If you select any prescription for a unit-dose, private label, repackaged, or obsolete drug, the system checks if there is a representative NDC available for that drug. If there is a representative NDC available, a message that suggests changing the drug NDC to a representative NDC appears.

To electronically send drugs that have no representative NDCs, follow these steps:

1. On the IMS menu bar, click **Utilities**, point to **Patient**, and then click **Prescription**.
2. On the gold bar of the **Prescription** window, click the red question mark  beside **Patient**.
3. In the **Search Patient** window, search for and select the applicable patient, and then click **Ok**.
4. In the center pane of the **Prescription** window, select the **S** check box for the applicable prescription.
5. In the lower pane of the **Prescription** window, click **Send**.
6. When the message that suggests changing the drug NDC to a representative NDC appears, click **Ok**.

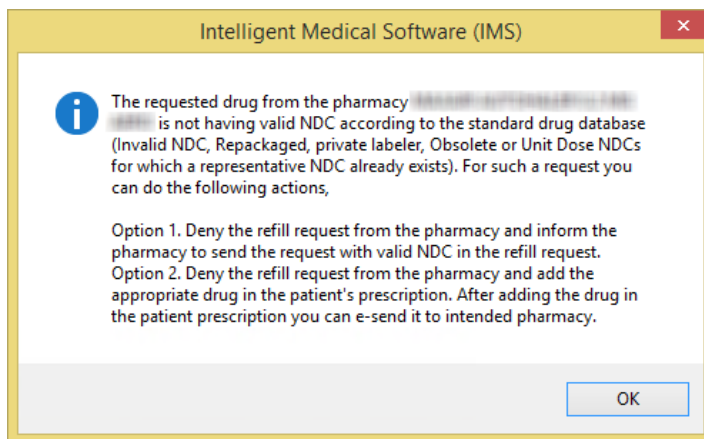
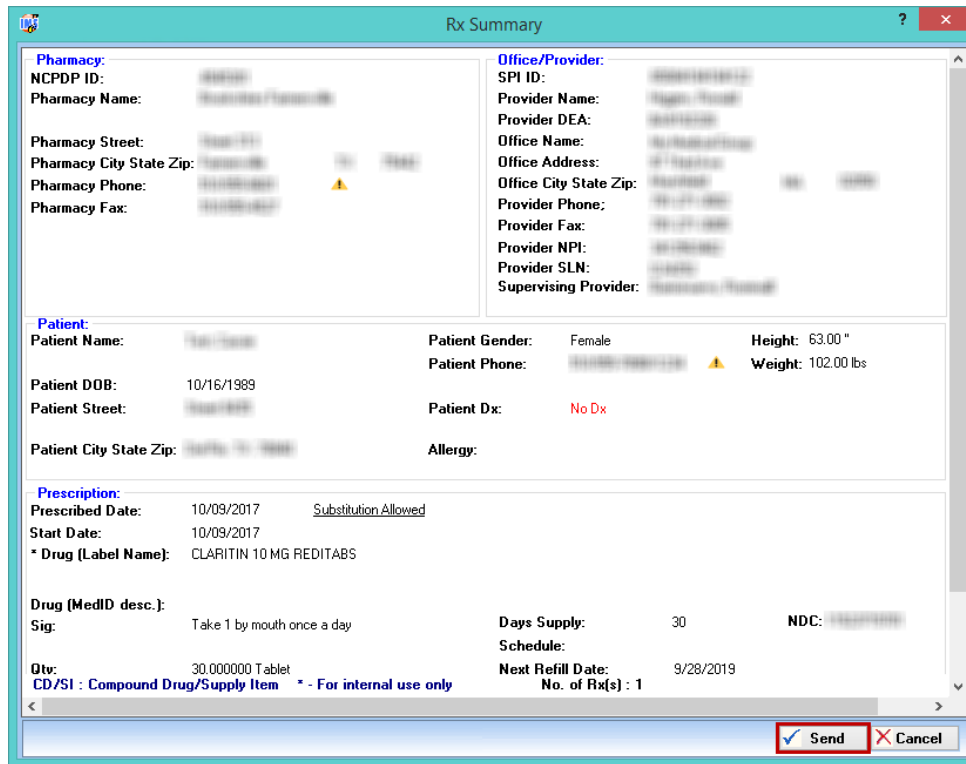


Figure 58 When the message appears, click **Ok** to change the drug's NDC to a representative NDC.

7. In the **Rx Summary** window, review the information, and then click **Send**.



Rx Summary

Pharmacy:
 NCPDP ID: [redacted]
 Pharmacy Name: [redacted]
 Pharmacy Street: [redacted]
 Pharmacy City State Zip: [redacted]
 Pharmacy Phone: [redacted] ⚠
 Pharmacy Fax: [redacted]

Office/Provider:
 SPI ID: [redacted]
 Provider Name: [redacted]
 Provider DEA: [redacted]
 Office Name: [redacted]
 Office Address: [redacted]
 Office City State Zip: [redacted]
 Provider Phone: [redacted]
 Provider Fax: [redacted]
 Provider NPI: [redacted]
 Provider SLN: [redacted]
 Supervising Provider: [redacted]

Patient:
 Patient Name: [redacted] Patient Gender: Female Height: 63.00"
 Patient DOB: 10/16/1989 Patient Phone: [redacted] ⚠ Weight: 102.00 lbs
 Patient Street: [redacted] Patient Dx: No Dx
 Patient City State Zip: [redacted] Allergy:


Prescription:
 Prescribed Date: 10/09/2017 Substitution Allowed
 Start Date: 10/09/2017
 * Drug (Label Name): CLARITIN 10 MG REDITABS

Drug (MedID desc.):
 Sig: Take 1 by mouth once a day Days Supply: 30 NDC: [redacted]
 Schedule:
 Qty: 30.000000 Tablet Next Refill Date: 9/28/2019
 CD/SI : Compound Drug/Supply Item * - For internal use only No. of Rx(s) : 1

Figure 59 When the Rx Summary window opens, review the information, and then click Send to electronically send the prescription.

Note:

In the Rx Summary window, you can view the patient’s allergy, height, and weight in the Patient section. You can also view the date when the patient starts to take the medication.

If the drug is a compound drug, point to the symbol  beside the drug to view its compound ingredients.

- When the “eRx has been sent to queue.” message appears, click OK.

Note:

If you select any prescription for a unit-dose, private label, repackaged, or obsolete drug that does not have an equivalent representative NDC available in the database, you will not

receive the message that suggests changing the drug NDC to a representative NDC. Surescripts also allows you to electronically prescribe these drugs.

Rx Management End-User Functionalities

In the Rx Management module, you can manage all prescription requests in one window. You can create new prescription requests, create prior authorizations, discontinue prescriptions, approve or deny refill requests, and change prescriptions.

Add a prescription request in the Add Rx Request window

In the **Add Rx Request** window, you can add prescription requests such as order, change, refill, authorization, or discontinue requests.

To add a prescription request, follow these steps:

1. On the IMS menu bar, click **Activities**, and then click **Rx Management**.
2. In the **Request** tab of the **Rx Management** window, click **Add Rx Request** in the lower pane.
3. In the **Search Patient** window, search for and select the applicable patient.
4. On the gold bar of the **Add Rx Request** window, type the name of the drug in the **Drug** box to search for a drug.
5. In the center pane of the **Add Rx Request** window, select the applicable drug in the **Prescribed Drug** list.





Note:

If you want to add a new drug to the **Prescribed Drug** list, click **Add New Drug** in the lower pane.

Press **F11** on your keyboard to add a row in the **Prescribed Drug** list where you can add a new prescription request for a patient.

6. From the **Request Type** list, select the type of the request that you want to add.
7. Enter the other applicable information.

You can also access the following functionalities:

- **PRN**. Click the **PRN** symbol  to set the SIG as pro re nata.
 - **NTE**. Click the **NTE** symbol  to set the applicable number of days for the Not To Exceed (NTE) value.
 - **DAW**. Click the **DAW** symbol  to set the SIG as Dispense As Written.
 - **Attach Doc.** Click **Attach Doc.** to open **Patient Document(s)** window.
 - Select **Scan** to scan a document that you want to attach.
 - Select **File Upload** to upload a document that you want to attach.
 - **Add Doc.** Click **Add Doc.** to add a new document in the **Patient Document(s)** window.
 - **View Selected Documents.** Click the **View Selected Documents** symbol  to view the selected document.
8. Click **Ok**.

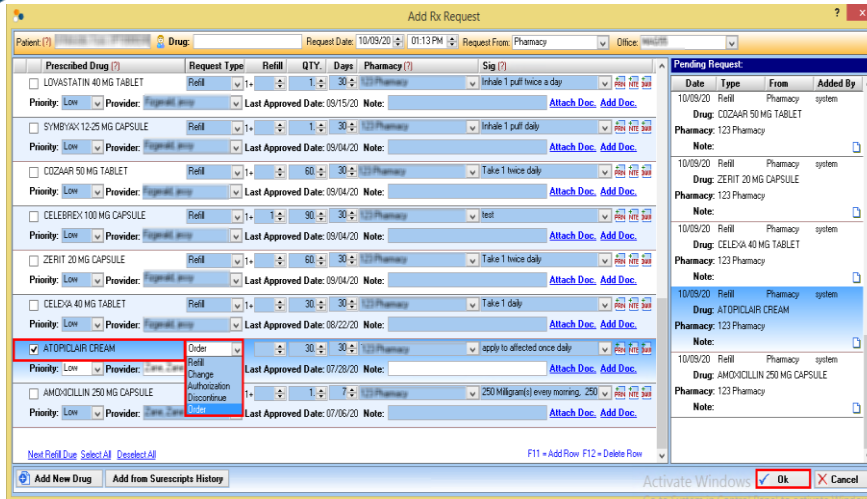



Figure 60 In the center pane of the Add Rx Request window, enter the applicable information, and then click Ok.

Note:

You can also access the Add Rx Request window through the chart view. To access the Add Rx Request window, press **Alt + C** > click **Rx > Add Rx Request**.

Before adding a new prescription request, check the request details in the **Pending Request** pane to avoid duplicate requests.

You can click the **Note** symbol  in the **Add Rx request** pane to view or add a note to a request.

Electronic prescription requests received from the pharmacy are automatically added, and the status appears as **Electronic Rx Request**.

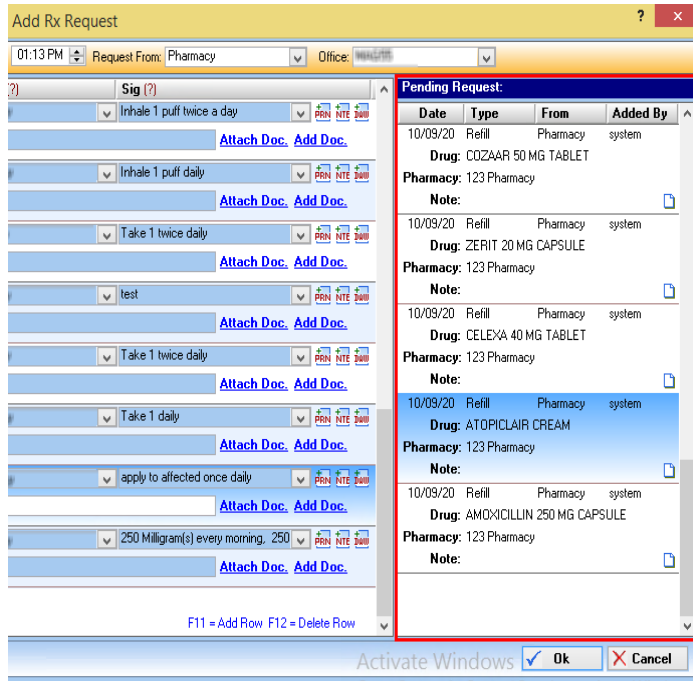



Figure 61 The Pending Request pane

Add a prescription request from fax and HIE documents

You can directly add a prescription request from received fax and HIE documents.

To add the prescription request, follow these steps:

1. On the IMS toolbar, click the **Fax/HIE Received** symbol .
2. On the gold bar of the **Fax/HIE Received** window, enter the applicable filter criteria, and then click **Retrieve**.
3. In the upper-left pane of the **Fax/HIE Received** window, search for and select the applicable fax document, and then click **Add Rx Request** in the lower pane.

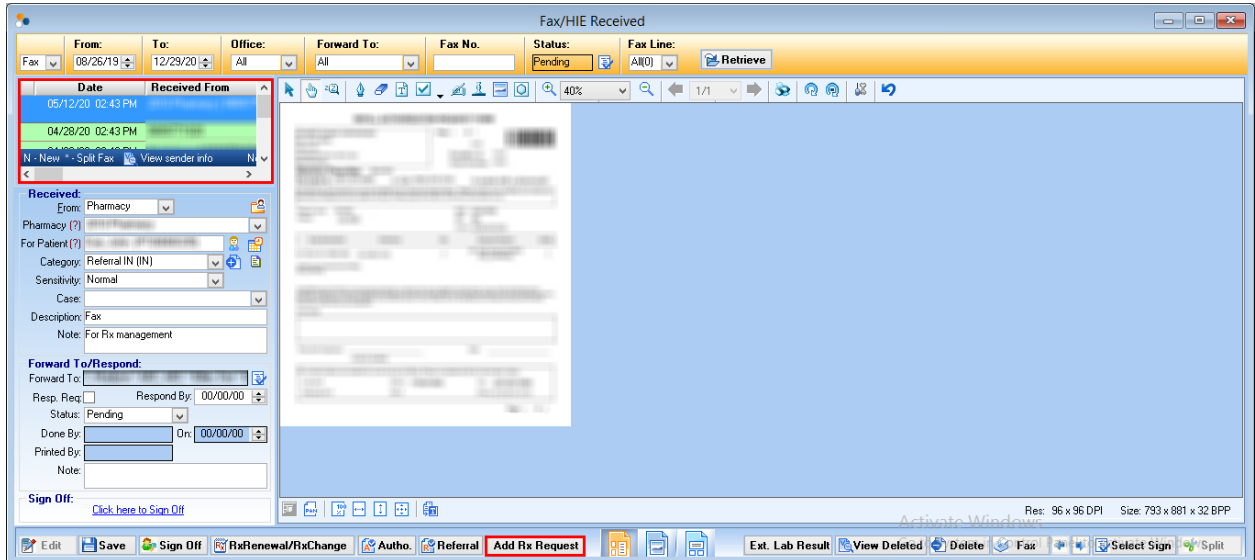


Figure 62 In the upper-left pane of the Fax/HIE Received window, search for and select the applicable fax document, and then click **Add Rx Request** in the lower pane.

4. On the gold bar of the **Add Rx Request** window, type the name of the drug in the **Drug** box to search for a drug.
5. In the center pane, select the applicable drug from the **Prescribed Drug** list.

Below the **Prescribed Drug** list, you can view the fax or HIE document.

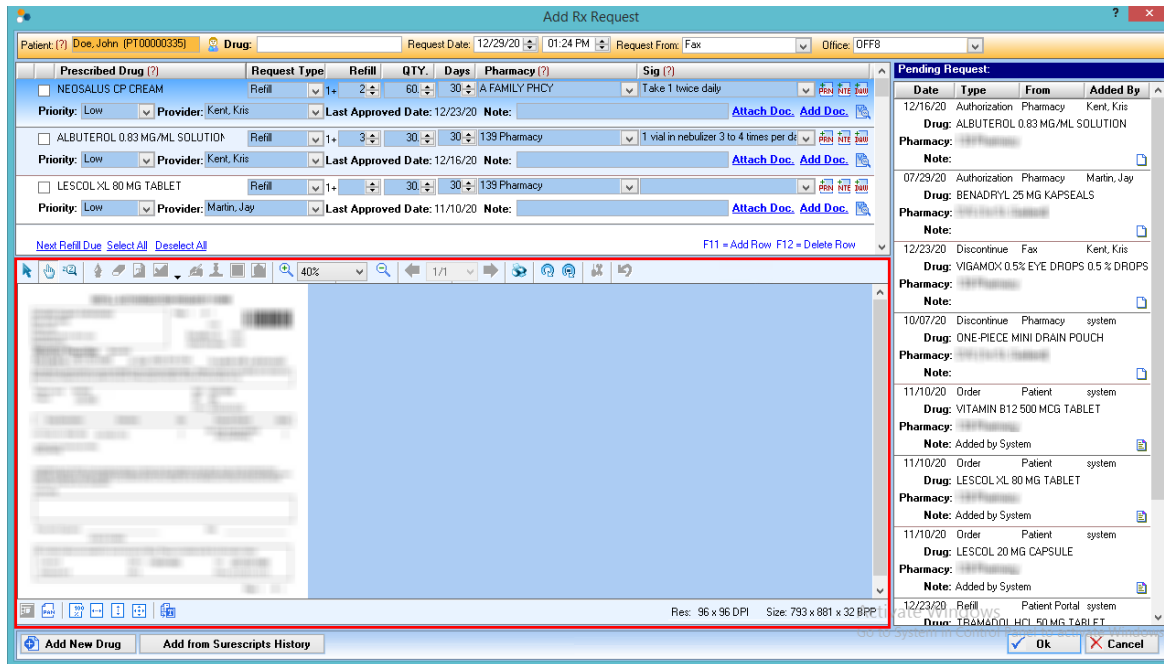


Figure 63 Below the Prescribed Drug list, you can view the fax or HIE document.

To add a drug that is not in the **Prescribed Drug** list, click **Add New Drug** in the lower pane to open the **Add Prescription** window where you can create a new prescription.


6. Enter the other necessary information, and then click **Ok**.

Add a prescription request from patient and pharmacy calls

Prescription requests from patients and pharmacies done through calls can be added manually to the **Rx Management** window through the **Patient Chart View** window.

To add prescription requests in **Patient Chart View**, follow these steps:

1. On the IMS screen, press **Alt + C**.

2. On the gold bar of the **Patient Chart View** window, click the question mark symbol  beside **Patient**.
3. In the **Search Patient** window, search for and select the applicable patient.
4. Click **Rx**, and then click **Add Rx Request**.
5. On the gold bar of the **Add Rx Request** window, type the name of the drug in the **Drug** field to search for a drug.
6. In the center pane of the **Add Rx Request** window, select the applicable drug in the **Prescribed Drug** list.

Note:


To add a drug that is not in the **Prescribed Drug** list, click **Add New Drug** in the lower pane to open the **Add Prescription** window where you can create a new prescription.

7. Enter the other necessary information, and then click **Ok**.

Approve or deny prescription renewals

When a pharmacy renews a prescription, it is necessary that the provider approves or denies the renewal request.

To approve or deny prescription renewals, follow these steps:

1. On the IMS menu bar, click **Activities**, and then click **Rx Management**.
2. On the gold bar of the **Rx Management** window, click the red question mark  beside **Patient**.
3. In the **Search Patient** window, search for and select a patient, and then click **Ok**.

4. In the center pane of the **Rx Management** window, click the **Request** tab in the center pane.
5. In the same column of the drug, click the **Approve/Deny** toggle button to either approve or deny the refill request.

To approve multiple refill requests, select the check boxes in the **S** column, and then click **Approve Refill** in the lower pane.

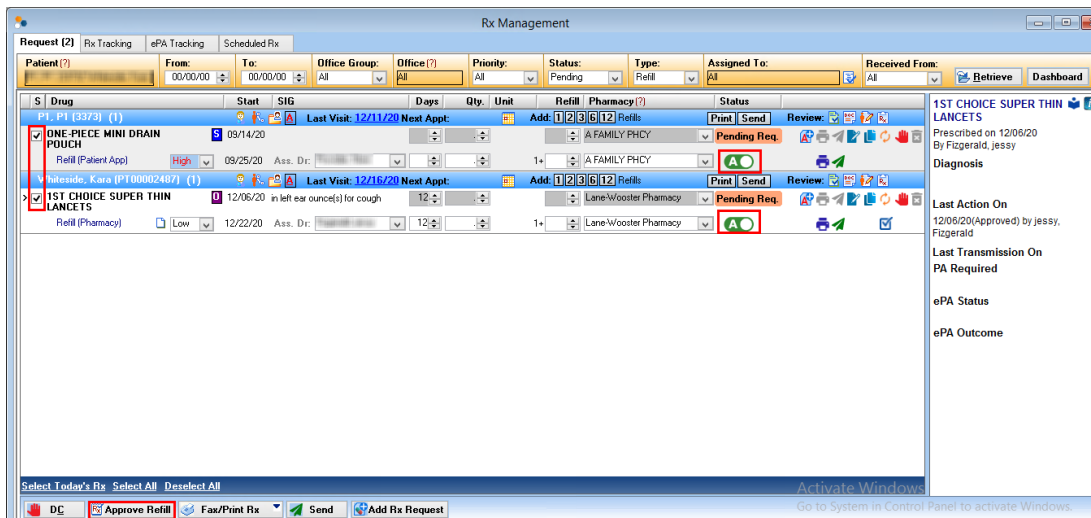



Figure 64 In the same column of the drug, click the **Approve/Deny** toggle button to approve or deny a refill request. To approve multiple refill requests, select the check boxes in the **S** column, and then click **Approve Refill** in the lower pane.

Change a prescription

When a pharmacy, patient, or another provider requests to change a prescription, it is necessary that the assigned provider approves or denies the change request.

To change a prescription, follow these steps:

1. On the IMS menu bar, click **Activities**, and then click **Rx Management**.

2. On the gold bar of the **Rx Management** window, click the red question mark  beside **Patient**.
3. In the **Search Patient** window, search for and select a patient, and then click **Ok**.
4. In the center pane of the **Rx Management** window, click the **Request** tab in the center pane.
5. On the gold bar of the **Request** tab, select **Change** from the **Type** list, and then click **Retrieve**.
6. In the row for the applicable drug, click **Change** in the **Status** column.

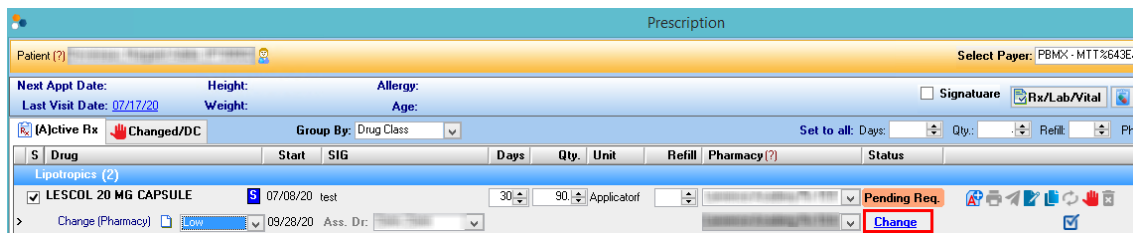


Figure 65 In the row for the applicable drug, click **Change** in the **Status** column.

7. From the **Reason** list in the **Change** window, select the change reason, and then click **Ok**.
8. In the **Change Prescription** window, make the applicable changes, and then do any of the following:
 - **Save**. Click **Save** to save the changes.
 - **Save & Send**. Click **Save & Send** to save the changes and send the prescription to the requester.

Create a prior authorization

When a pharmacy requests for a prior authorization, you can create or attach a prior authorization in the **Rx Management** window.

To create a prior authorization, follow these steps:

1. On the IMS menu bar, click **Activities**, and then click **Rx Management**.
2. On the gold bar of the **Rx Management** window, click the red question mark (?) beside **Patient**.
3. In the **Search Patient** window, search for and select a patient, and then click **Ok**.
4. In the center pane of the **Rx Management** window, click the **Request** tab in the center pane.
5. On the gold bar of the **Request** tab, select **Authorization** from the **Type** list, and then click **Retrieve**.
6. In the row for the applicable drug, click **Create** in the **Status** column.

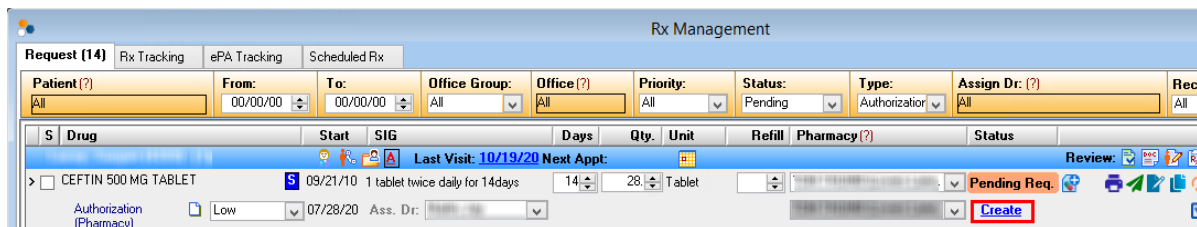


Figure 66 In the row for the applicable drug, click **Create** in the **Status** column.


7. In the **Auth./Referral Tracking** window, search for and select the prior authorization document.

You can click **Add** in the lower pane to create a new prior authorization document.

8. Click **Save**.

Note:

Track all the sent prior authorizations in the **ePA Tracking** tab.

You can click the **Add Request** symbol  beside the status to open a new row where you can add a prescription request to the prior authorization.

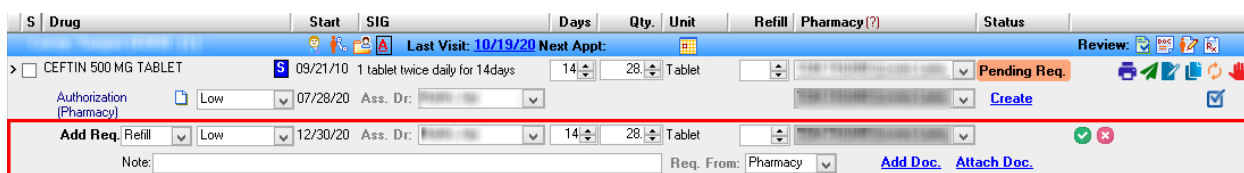



Figure 67 A new row where you can add a prescription request to the prior authorization

Discontinue a prescription

When a pharmacy, patient, or another provider requests to discontinue a prescription, the assigned provider can discontinue a prescription in the **Rx Management** window.

To discontinue a prescription, follow these steps:

1. On the IMS menu bar, click **Activities**, and then click **Rx Management**.
2. On the gold bar of the **Rx Management** window, click the red question mark  beside **Patient**.
3. In the **Search Patient** window, search for and select a patient, and then click **Ok**.

4. In the center pane of the **Rx Management** window, click the **Request** tab in the center pane.
5. On the gold bar of the **Request** tab, select **Discontinue** from the **Type** list, and then click **Retrieve**.
6. In the row for the applicable drug, click **Discontinue** in the **Status** column.

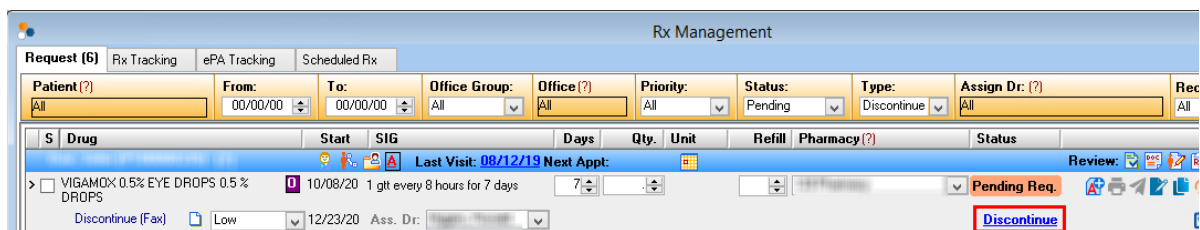


Figure 68 In the row for the applicable drug, click **Discontinue** in the **Status** column.


7. From the **Reason** list in the **Discontinue** window, select the discontinue reason, and then click either of the following:
 - **DC**. Click **DC** to discontinue the selected prescription.
 - **DC & eSend**. Click **DC & eSend** to discontinue and electronically send the selected prescription.

Prescribe a new prescription

New prescription requests that are manually added in the **Rx Management** window appear in the **Other Request** column.

To prescribe the new prescription request to the patient, follow these steps:

1. On the IMS menu bar, click **Activities**, and then click **Rx Management**.

2. On the gold bar of the **Rx Management** window, click the red question mark  beside **Patient**.
3. In the **Search Patient** window, search for and select a patient, and then click **Ok**.
4. In the center pane of the **Rx Management** window, click the **Request** tab in the center pane.
5. On the gold bar of the **Request** tab, select **New** from the **Type** list, and then click **Retrieve**.
6. In the row for the applicable drug, click **Prescribe** in the **Status** column.

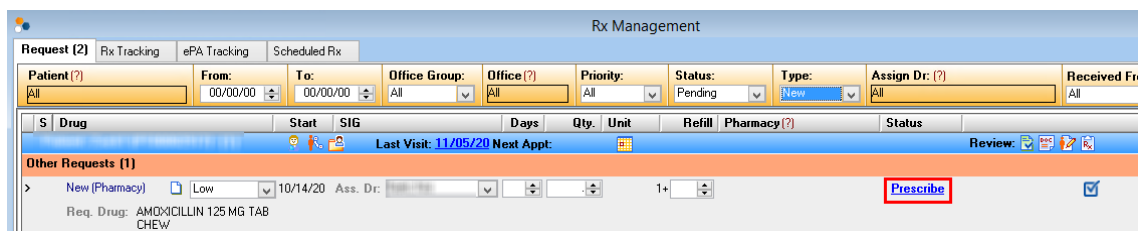












Figure 69 In the row for the applicable drug, click **Prescribe** in the **Status** column.

Note:

Regardless of the type of request, you can access these common symbols to the right of the **Status** column:

- **Add Request.** Click the **Add Request** symbol  to add a refill, change, or discontinue request.
- **Add PA Request.** Click the **Add PA Request** symbol  to add a prior authorization request.
- **Approve & Print.** Click the **Approve & Print** symbol  to approve and print the prescription request.

If the last approved date is the current date, the symbol works as **Print**.

- **Approve & Send.** Click the **Approve & Send** symbol  to approve and send the prescription request.
If the last approved date is the current date, the symbol works as **Send**.
- **Edit.** Click the **Edit** symbol  to open the **Edit Prescription** window and edit the prescription.
- **Copy and Edit.** Click the **Copy and Edit** symbol  to copy a prescription request.
- **Change.** Click the **Change** symbol  to change the prescription.
- **Discontinue.** Click the **Discontinue** symbol  to discontinue the prescription.
- **Click here to mark the Request done.** Click the **Click here to mark the Request done** symbol  to mark the request as done.
- **Open Auth./Referral Tracking.** Click the **Open Auth./Referral Tracking** symbol  to open the **Auth./Referral Tracking** window.

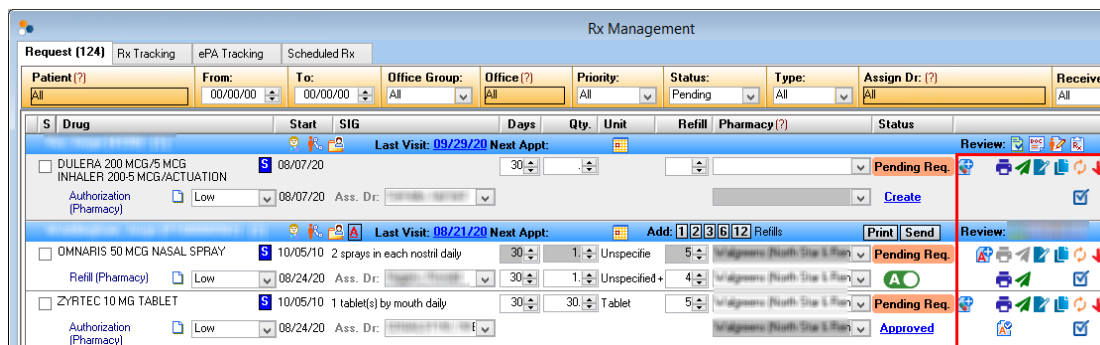


Figure 70 The common symbols to the right of the Status column