McKESSON
Empowering Healthcare

PRACTICE PARTNER®

ePrescribing Module

User's Guide

McKesson Provider Technologies
Practice Partner
2401 Fourth Avenue, Suite 700
Seattle, WA 98121
1.800.770.7674
www.practicepartner.com

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Introduction

This guide offers step-by-step instructions on how to setup and use Practice Partner Electronic Prescribing ("ePrescribing") module. The Practice Partner ePrescribing module allows you to send and receive prescription-related messages to and from pharmacies, to view real-time pharmacy benefits eligibility data on your patients, to see up-to-date formulary and coverage information for specific drugs during the prescribing process, and to view information about prescriptions your patients have had filled, even from other providers.

Important: To use the ePrescribing module you must have an always-on Internet connection.

ePrescribing Module Configuration Checklist

- ☐ Install Patient Records 9.4
- ☐ If you are not already subscribed to the Drug Interaction database, you must subscribe to it and install it before using the ePrescribing module.
- ☐ Enroll your providers with Practice Partner ePrescribing. To do this, please contact the Practice Partner EDI enrollment by sending an e-mail to edienrollment@practicepartner.com. The EDI enrollment specialist will then contact you to obtain information about your practices and providers and complete the enrollment process for you. Please note that even if you have been using the Practice Partner "SureScripts Interface" product prior to installing the ePrescribing module, you still need to complete the enrollment step.
- ☐ Add the ePrescribing Provider Identifiers provided to you by the EDI enrollment specialist to your Practice Partner system. Note that if you are already using the Practice Partner "SureScripts Interface" then SureScripts identifiers will already have been entered for your Providers. See the **Adding ePrescribing Provider Identifiers to your System** section for more information.
- ☐ Add your Providers' NPIs (National Provider Identifiers) and DEA (United States Drug Enforcement Administration) numbers into Practice Partner (if you have not already done so). See the **Adding NPIs and DEAs to your System** section for more information.
- ☐ Install the ePrescribing module. See the *ePrescribing Module Installation Guide* for step-by-step instructions.
- ☐ If needed, activate your installation of the ePrescribing module to the Practice Partner Clearinghouse. This process, by default, occurs during the installation of the ePrescribing interface, though you may choose to skip that step of the installation. If you do, you can activate your installation of RxHub and/or SureScripts to the Practice Partner Clearinghouse at a later time by running the standalone activation utility, which has the filename PMSI.CH.Activation.exe and is located in your database folder (usually p:\ppart). The activation utility must be run locally from the server.
- ☐ If needed, use the ePrescribing Configuration Utility to configure the settings for the ePrescribing interface and the Pharmacy Download Utility. This utility runs automatically when the ePrescribing interface is installed. You can also run the utility at any time after the installation if you need to update the settings. You can find the utility, which has the filename PMSI.ePrescriptionConfiguration.exe in your database folder (usually p:\ppart). The ePrescribing Configuration Utility must be run locally from the server. See the **ePrescribing Configuration Utility** section for more information.

- ☐ One important step in configuring the ePrescribing module is to use the ePrescribing Configuration Utility to specify cross-reference relationships between Providers and Operators. The ePrescribing module will use these cross-reference relationships to appropriately route ePrescribing-related messages to the appropriate Practice Partner Operator.
- ☐ If needed, your system administrator can specify the approach for recording patient consent to collect prescription fill history by adjusting the ppart.ini file setting, "RxFillHxCheckConsent ". You can also adjust the "Number of days back to look for formulary data" setting on the **Rx Defaults** tab of the Prescription Defaults screen. See the **Optional Configuration Settings** section for more information.

ePrescribing Activity Reporting

The Practice Partner ePrescribing Module, as explained elsewhere in this document, provides connectivity to payors and pharmacies through RxHub LLC.

As a condition of being allowed to exchange data with the RxHub network, RxHub requires us to provide a report on provider prescription activity for those patients whose pharmacy benefits are by the Pharmacy Benefit Manager (PBM) members of RxHub. This data may include the identity of the provider, the health plan covering the patient, the formulary status and other coverage aspects of the medication prescribed, and the mode of output (printed, faxed, or sent electronically).

If you do not wish this data to be sent to RxHub, at this time your only recourse is to turn off RxHub connectivity and use the SureScripts network only. Practice Partner Technical Support can provide assistance with making this change. This will result in prescription eligibility checking, formulary checking on the prescription dialog, and fill history checking being unavailable, as well as electronic transmission of prescriptions to RxHub mail-order pharmacies.

ePrescribing Configuration Utility

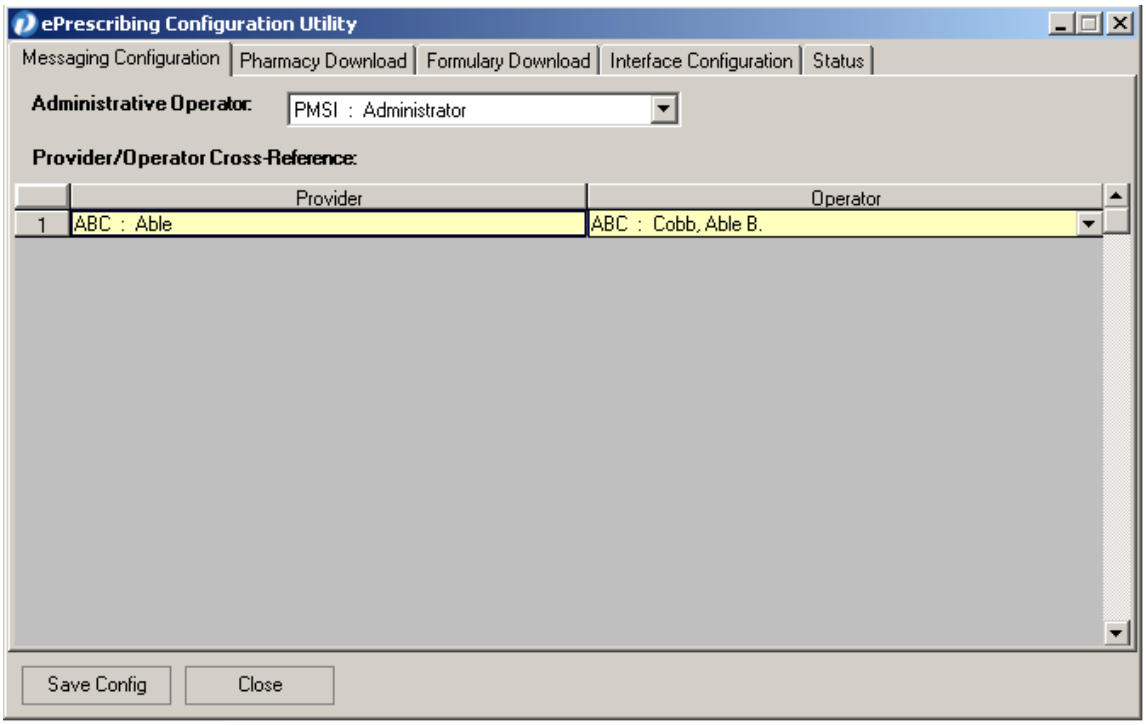
The ePrescribing Configuration Utility is used to configure the settings for the ePrescribing module. This utility runs automatically when the ePrescribing interface is installed. You can also run the utility at any time after the installation if you need to update the settings.

The Messaging Configuration tab

The messaging settings allow you to change the Administrative Operator entered during the ePrescribing interface installation, and to specify the Provider ID and Operator ID cross-reference relationships.

The Practice Partner ePrescribing module sends routes various messages (such as refill requests) from pharmacies and pharmacy benefit managers to Practice Partner Operators through the Practice Partner messaging system. These messages, in their original form, identify the Provider who is to receive them. To ensure that ePrescribing-related messages are sent to the proper Operator you must specify, for each Provider in your system who will be using the ePrescribing module, which Operator should receive their messages. This is done using the Provider/Operator Cross Reference tool.

In addition, you must also specify an "Administrative Operator" for your system to receive important messages (for instance, if a message is received from a pharmacy but the Provider cannot be found in your system). You will be prompted for the Administrative Operator during the process of installing the Practice Partner ePrescribing interface. You can also change your selection from the **Messaging Configuration** tab.



Messaging Configuration tab

To specify the provider ID and operator ID cross-reference relationships:

1. Start the ePrescribing Configuration Utility by double-clicking the **PMSI.ePrescriptionConfiguration.exe** in the \ppart directory.
2. Click on the **Messaging Configuration** tab.
3. Under "Provider-Operator Cross Reference", select the provider ID from the drop-down menu. Please note the drop-down list only displays providers that are configured for ePrescribing by having a RxHub or SureScripts ID entered under Practice Maintenance.
4. Click the down arrow button in the "Operator" column to select the corresponding operator ID.
5. Repeat this process until you have entered all desired cross-reference relationships. There should be one entry for every provider in your system who is participating in ePrescribing.
6. Click the **Save Config** button to save your settings.
7. When you finish, click the **Close** button.

To specify the Administrative Operator:

- On the **Messaging Configuration** tab, select the Administrative Operator from the **Administrative Operator** drop-down list. Please note the drop-down list only displays providers that are configured for ePrescribing by having a RxHub or SureScripts ID entered under Practice Maintenance.

Fields on the Messaging Configuration tab

Field	Description
Administrative Operator	This field displays the administrative operator selected during the ePrescribing interface Installation. You can change the administrative operator by selecting a new operator from the drop-down list.
Provider	Select the provider ID. Please note the drop-down list only displays providers that are configured for ePrescribing by having a RxHub or SureScripts ID entered under Practice Maintenance. See the **Adding ePrescribing Provider Identifiers to your System** section for more information.
Operator	Click the down arrow button to select the provider's corresponding operator ID.

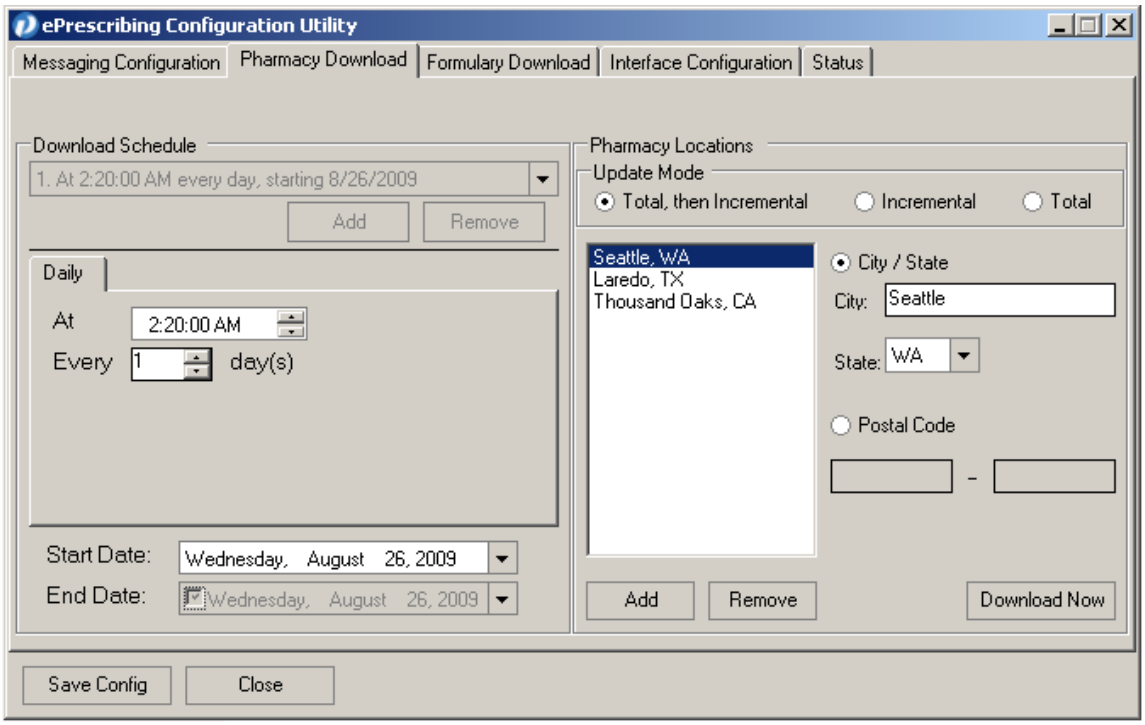
The Pharmacy Download tab

The Practice Partner Clearinghouse maintains a database of all U.S. pharmacies with whom you can connect using the Practice Partner ePrescribing module. This database is updated nightly, and made available for your site to download. You can use the ePrescribing Configuration Utility to configure which pharmacies to download (based on geographic parameters) and how often to download an update of the pharmacy data.

Note: Formulary data will be updated every time a scheduled Pharmacy information download takes place.

Use the **Pharmacy Download** tab in the ePrescription Configuration Utility to configure pharmacy downloading. You can configure the utility to download the pharmacy data incrementally or in total. If you select the incremental setting, the utility will download updated and new pharmacy data at the scheduled download times. If you select the total option, data for all ePrescribing pharmacies within the geographic areas you specify will be downloaded during the scheduled download time. You can also select to download the entire ePrescribing pharmacy database during the first scheduled download time, and thereafter to only download the updated and new pharmacy data during the scheduled download times (this is the recommended setting).

You can choose to download pharmacies based on city, state, or postal code(s).



Pharmacy Download tab

Fields on the Pharmacy Download tab

Field	Description
Download Schedule	This field displays the selected download schedule. *Note: The* **Add** *and* **Remove** *buttons are not used for this type of scheduled item.*
Daily	
At	Select the Pharmacy Download Utility start time. You can use the fields up and down arrows to scroll to the desired time. Please note the utility will actually run within an hour of the specified time.
Every	Enter the interval in days that the utility will download the ePrescribing pharmacy database and/or updates. You can use the fields up and down arrows to scroll to the desired number of days. The minimum number of days is 1, and the maximum number of days is 7.
Start Date	Select the Pharmacy Download Utility start date. You can enter the date, or click the down arrow button to access the calendar.
End Date	The end date is not used for this type of scheduled item.
Pharmacy Locations	
Update Mode	
Total, than Incremental	Select this option to download the entire ePrescribing pharmacy database for the first download. After the first download, only new or updated pharmacy data will be downloaded.
Incremental	Select this option to only download, the new or updated ePrescribing pharmacy data. It is suggested that you first use the **Download Now** button, before selecting this option.
Total	Select this option to download the entire ePrescribing pharmacy database.
City/State	Select this option to download pharmacies based on an entered city and/or state. Click the **Add** button to add a new location to the list. To remove a location from the list box, highlight the location, and click the **Remove** button.
City	Enter the city that you want to download pharmacies for. You can enter a percentage sign after the city, to generate a list of matching cities for the selected state. For example, if you enter Proscot%, a list of the closest matching cities in the selected state will be displayed.

State	Select the state that the entered city is located in, or a state that you want to download pharmacies for.
Postal Code	Select this option to download pharmacies based on an entered postal code or a range of postal codes. You can only enter 5-digit postal codes. You cannot enter 9-digit postal codes. Click the **Add** button to add a new location to the list. To remove a postal code from the list box, highlight the postal code, and click the **Remove** button.
Download Now button	Click this button to download the ePrescribing pharmacy database in real-time.
Save Config button	Click this button to save your Pharmacy Download Utility settings. You must click this button to save your changes before exiting the utility.

The Formulary Download tab

You can use the **Formulary Download** tab to select the day and time that you would like to have your system perform automated downloading of health plan formulary and coverage data (which is displayed to users when they are creating prescriptions in Patient Records). This is an optional task. If you do not schedule the ePrescribing Formulary Download process it is automatically scheduled to run every Saturday starting between 8:00pm and 11:59pm.

See the *Formulary Download and File Update Process* section for details about the Formulary Download and File Update process.

Note: Practice Partner uploads the latest formulary data files on Fridays. As a result, you cannot schedule the ePrescribing Formulary Download process to run on Fridays.

Scheduling the ePrescribing Formulary Download Process

To schedule the ePrescribing Formulary Download process:

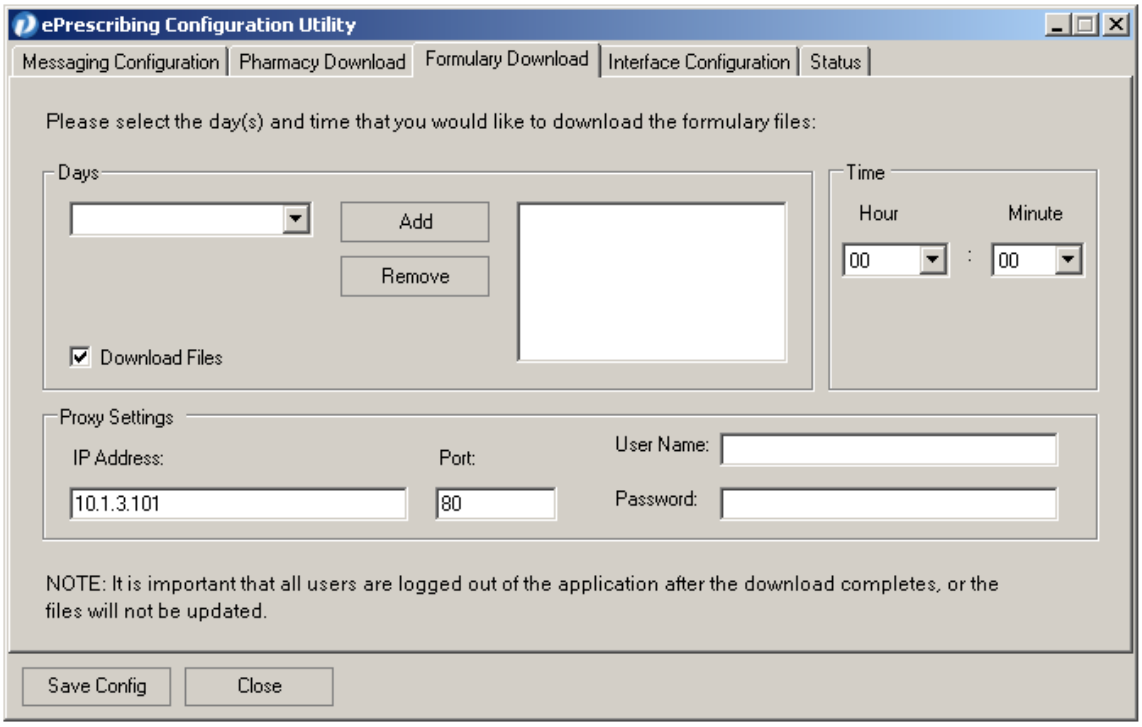
1. Start the ePrescribing Configuration Utility by double-clicking the **PMSI.ePrescriptionConfiguration.exe** in the database directory (usually p:\ppart). The ePrescribing Configuration Utility screen appears.
2. Click on the **Formulary Download** tab.
3. Select the day that you want the ePrescribing Formulary Download process to run from the drop-down list, and click the **Add** button to add the day to the list. To remove the day from the list box, highlight the day, and click the **Remove** button.
4. Click the **Hour** and **Minute** down arrows to scroll to the desired start time.
5. Keep the **Download Files** check box selected.
6. Click the **Save Config** button to save your settings.
7. When you finish, click the **Close** button.

Adding your Proxy Settings

If your site uses a proxy server to connect to the internet you should run the ePrescribing Configuration Utility and enter your proxy settings to enable the ePrescribing Formulary Downloader to connect to the internet.

To add your proxy settings:

1. Start the ePrescribing Configuration Utility by double-clicking the **PMSI.ePrescriptionConfiguration.exe** in the database directory (usually p:\ppart). The ePrescribing Configuration Utility screen appears.
2. Click on the **Formulary Download** tab.
3. Type the IP address of your proxy server in the provided field.
4. Type the port number that is used by the proxy server for client connections in the provided field.
5. Type the user name in the provided field.
6. Type the password in the provided field.
7. Click the **Save Config** button to save your settings.
8. When you finish, click the **Close** button.

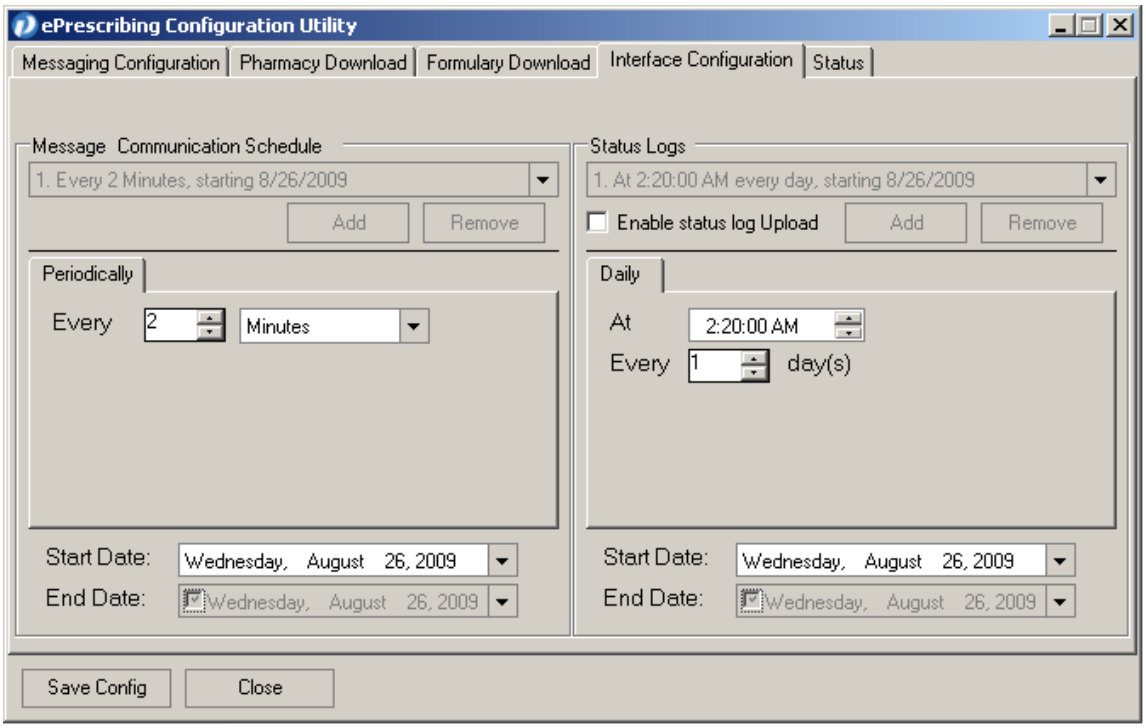


ePrescribing Configuration Utility - Formulary Download tab

The Interface Configuration tab

Use the **Interface Configuration** tab to configure the settings for the ePrescribing interface. This tab allows you to specify how often Practice Partner will check for incoming ePrescribing messages and send outgoing messages.

You can also enable the status log option from this tab. The status log sends data to Practice Partner to let us know if our medication algorithm is working correctly. The information sent to Practice Partner via the status log includes the name of requested medications as they appear in inbound refill request messages, the names of medications in your Practice Partner database to which they were compared, and whether the Practice Partner ePrescribing interface concluded there was a match. The data transmitted to Practice Partner will not include any patient or site information. Practice Partner will use this information to optimize the algorithm by which we match the names of medications in inbound refill requests messages to medications in your Practice Partner database.



Interface Configuration tab

Fields on the Interface Configuration tab

Field	Description
Message Communication Schedule	This field displays the selected message communication schedule. *Note: The* **Add** *and* **Remove** *buttons are not used for this type of scheduled item.*
Periodically	
Every	Enter the time interval in seconds or minutes that the Practice Partner Clearinghouse will send and check for messages from ePrescribing. You can use the fields up and down arrows to scroll to the desired time. Select Seconds or Minutes from the corresponding drop-down list.
Start Date	Select the date that you want the Practice Partner Clearinghouse to start checking for messages from ePrescribing. You can enter the date, or click the down arrow button to access the calendar.
End Date	The end date is not used for this type of scheduled item.
Status Logs	This field displays the selected status log schedule. *Note: The* **Add** *and* **Remove** *buttons are not used for this type of scheduled item.*
Enable Status Log Upload	Select this option to enable the status log. The status log sends data to Practice Partner to let us know if our medication algorithm is working correctly. The information sent to Practice Partner via the status log includes the name of requested medications as they appear in inbound refill request messages, the names of medications in your Practice Partner database to which they were compared, and whether the Practice Partner ePrescribing interface concluded there was a match. The data transmitted to Practice Partner will not include any patient or site information. Practice Partner will use this information to optimize the algorithm by which we match the names of medications in inbound refill requests messages to medications in your Practice Partner database.
Daily	
At	Select the time that the status log will be sent to Practice Partner.
Every	Select the interval in days that the status log will be sent to Practice Partner.

Start Date	Select the first date that you want the status log to be sent to Practice Partner. You can enter the date, or you can click the down arrow button to access the calendar.
End Date	The end date is not used for this type of scheduled item.
Save Config button	Click this button to save your ePrescribing interface settings. You must click this button to save your changes before exiting the utility.

The Status tab

Use the **Status** tab to start and stop the ePrescription Server. You may on occasion need to stop the ePrescription Server when running certain system utilities such as PRUtils or when restoring your data from a backup.

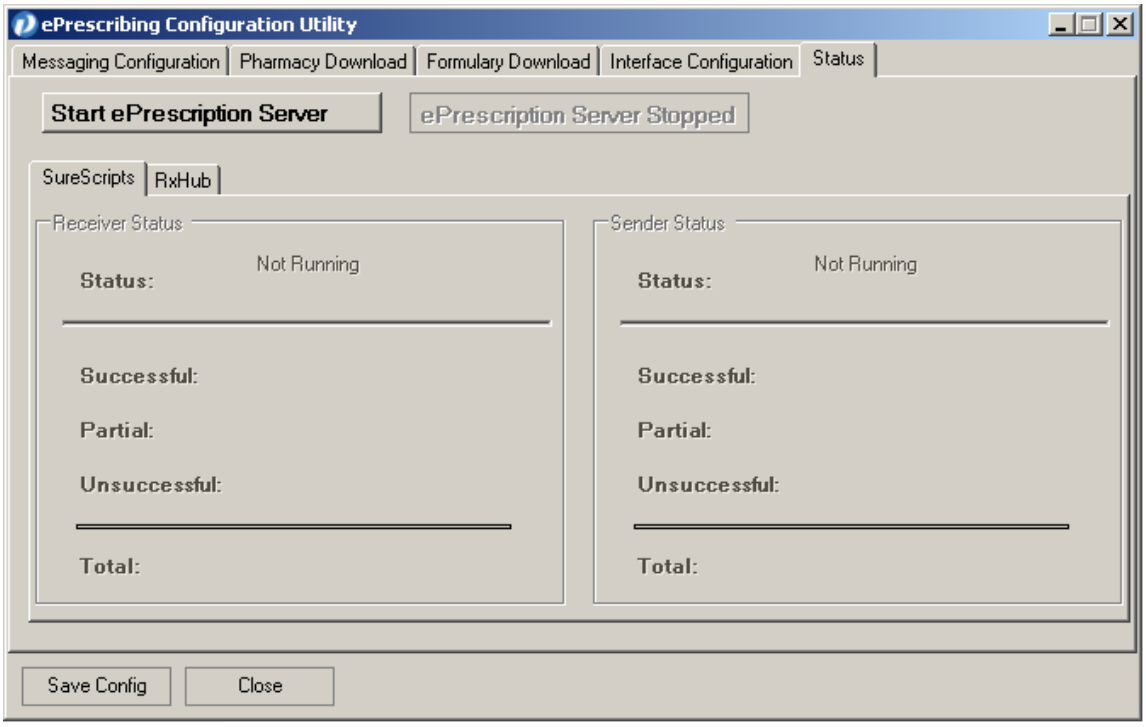
The Receiver Status and Sender Status sections of the screen display the date and time the status was Started or Stopped.

To stop the ePrescription Server:

- Click the **Stop ePrescription Server** button. The button text will change to ePrescription Server Stopped when the server has stopped.

To start the ePrescription Server:

- Click the **Start ePrescription Server** button. The button text will change to ePrescription Server Started when the server starts.



Status tab

Fields on the Status tab

Field	Description
Start ePrescription Server	Click this button to start the ePrescription Server.
Stop ePrescription Server	Click this button to stop the ePrescription Server.

Practice Partner Clearinghouse Enrollment

Before using the ePrescribing module you must enroll your providers with Practice Partner ePrescribing. To do this, please contact the Practice Partner EDI enrollment specialist by sending an e-mail to edienrollment@practicepartner.com. The EDI enrollment specialist will then contact you to obtain information about your practices and providers and complete the enrollment process for you. Please note that if even if you have been using the Practice Partner "SureScripts Interface" product prior to installing the ePrescribing module, you still need to complete an enrollment step.

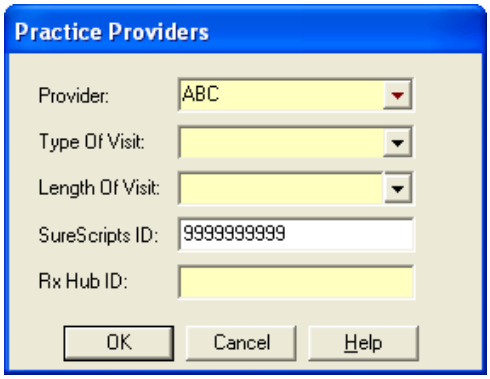
You will need to add the ePrescribing Provider Identifiers provided to you by the EDI enrollment specialist to your Practice Partner system. See the **Adding ePrescribing Provider Identifiers to your System** section for more information.

Adding ePrescribing Provider Identifiers to your System

Once you have enrolled your providers with Practice Partner ePrescribing, the Practice Partner EDI enrollment specialist will provide you with special ePrescribing identifiers that you must enter into your Practice Partner system. These will identify your providers to the two ePrescribing networks with which Practice Partner connects: SureScripts and RxHub. You will receive one RxHub ID for each Provider, and at least one SureScripts ID for each Provider (Providers who are associated with more than one "Practice" in your Practice Partner system will have one SureScripts ID for **each** Practice with which they are associated). Note that if you are already using the Practice Partner "SureScripts Interface" then SureScripts identifiers will already have been entered for your Providers.

To add ePrescribing Provider Identifiers to your system:

1. Select Maintenance > **Practices**. The **Practice Maintenance** screen appears.
2. On the **Practice Maintenance** screen, select the first practice for which you wish to add ePrescribing Provider Identifier data. Click the **Edit** button. The **Practice Maintenance <Edit>** screen appears. Click on the **General 2** tab.
3. In the Providers Affiliated with Practice grid highlight the first provider for which you wish to add SPI data and click the **Edit Prv** button. If the provider is not listed, click the **New Prv** button and enter the Provider ID in the **Provider** field on the Practice Providers screen.
4. Enter the ePrescribing Provider Identifiers for the selected provider in the **SureScripts ID** and **RxHub ID** fields. Note that the SureScripts ID will be different for each Practice for a particular Provider, but the RxHub ID will be the same for all Practices for a particular Provider.



Practice Providers screen

5. When you finish, click the **OK** button.
6. Repeat steps 3-5 until you have entered ePrescribing Provider Identifiers for each provider for that Practice. Click **OK** to return to the **Practices Maintenance** screen.
7. Repeat steps 2-6 for each of the practices for which you wish to add ePrescribing Provider Identifiers data.

Important: If you wish in the future to allow new Providers at your site who use the Practice Partner ePrescribing module, you will need to enroll them and add their ePrescribing Provider Identifiers, as above.

Adding NPIs and DEAs to your System

In order to use the Practice Partner ePrescribing module, each provider must have their National Provider Identifier and their Drug Enforcement Agency numbers added to the system.

To add National Provider Identifiers to your system:

1. Select Maintenance > **Providers**. The **Providers Maintenance Select** screen appears.
2. On the **Providers Maintenance Select** screen, highlight the provider for which you want to enter an NPI. Click the **Edit** button. The **Provider Maintenance <Edit>** screen appears. Click the **General** tab.
3. Enter the National Provider Identifier for the selected provider in the **NPI** field.
4. When you finish, click the **OK** button.
5. Repeat steps 2-4 until you have entered NPIs for each provider. Click **OK** to return to the **Providers Maintenance Select** screen.

To add Drug Enforcement Agency (DEA) numbers to your system:

1. Select Maintenance > **Providers**. The **Providers Maintenance Select** screen appears.
2. On the **Providers Maintenance Select** screen, highlight the provider for which you want to enter the DEA information for. Click the **Edit** button. The **Provider Maintenance <Edit>** screen appears. Click the **Credentials** tab.
3. Enter the Drug Enforcement Agency number for the selected provider in the **DEA** field.

   Enter the date the DEA number was first issued in the **First Issued** field, and enter the date the DEA number was last renewed, or the date it needs to be renewed in the **Last/Next Renewed** field. You can also click the down arrow button to access the calendar.
4. When you finish, click the **OK** button.
5. Repeat steps 2-4 until you have entered DEAs for each provider. Click **OK** to return to the **Providers Maintenance Select** screen.

Adding Pharmacies to Patient Records

Before you can send a prescription to a pharmacy electronically, that pharmacy needs to exist in your Practice Partner database. The preferred method to add pharmacies is using the automatic Pharmacy Download process of the Practice Partner ePrescribing module. See the **ePrescribing Configuration Utility** section above for a complete overview of this. This section describes how to enter a pharmacy into your database manually, though it is likely to be much more convenient, and the risk of errors is less, if you use the Pharmacy Download Utility. Once a pharmacy exists in your system, you can associate it with a patient in the Patient Demographics section.

Note: This process is not necessary for any pharmacy downloaded from the ePrescribing pharmacy database. See the **ePrescribing Configuration Utility** section for more information.

Procedures for adding pharmacies

To add a new pharmacy:

1. Select Maintenance > Tables > **Pharmacies**. The **Pharmacy IDs Select** screen appears.
2. On the **Pharmacy IDs Select** screen, click the **New** button. The **Pharmacy <New>** screen appears.
3. Enter the pharmacy ID and name in the **Pharmacy ID** and **Pharmacy Name** fields.
4. Enter the NCPD ID in the corresponding field. Please note this ID must be obtained from the pharmacy you are entering the information for.
5. Select **SS** from the **Send Type** drop-down menu if the pharmacy is affiliated with the SureScripts network, or RxH if it is affiliated with the RxHub network.
6. Enter any other applicable information in the fields on this screen.
7. When you are finished click the **OK** button.

Repeat this process to add all desired pharmacies to Patient Records.

See the **Pharmacies** Help topic for a complete explanation of the fields on the **Pharmacy <New>** screen.

Once a pharmacy exists in your system, you can associate it with a patient using Patient Demographics. See the **Patient Pharmacies** Help topic for a complete explanation of how to associate a patient with a pharmacy.

Formulary Download and File Update Process

The Formulary Download process downloads the latest formulary data from Practice Partner's clearinghouse and saves them in your database directory (usually P:\ppart), providing you with up-to-date health plan formulary and coverage data for your Practice Partner system to use to give you information, when you generate a prescription, about the patient's health plan coverage for that medication. After the initial download of the formulary files, updated files will be downloaded once weekly and automatically copied to the destination folders. If the scheduled day and time (Saturday starting between 8:00pm and 11:59pm by default) conflicts with any scheduled maintenance or operational hours for any of your clinic(s), then you can use the **Formulary Download** tab in the ePrescribing Configuration Utility to change the scheduled time to a different day and time. See the *Scheduling the ePrescribing Formulary Download Process* section for more information.

Note: The ePrescribing Interface installation will set the RxHubDownloadFormularies setting in the ppart.ini file to ON. This setting controls the Formulary Download process. This setting must remain ON for the Formulary Download process to work.

IMPORTANT: If your site uses a proxy server to connect to the Internet you should run the ePrescribing Configuration Utility and enter your proxy settings in the **Formulary Download** tab to enable the ePrescribing Formulary Downloader to connect to the internet. See the *Adding your Proxy Settings* section for more information.

Formulary updates may take between 4 to 8 hours to complete depending on your Internet connection speed. All users must be off the system to run the formulary download. If any users are logged into any Practice Partner application (including Practice Partner Patient Records, Practice Partner Medical Billing, Practice Partner Zoom, etc.) the formulary update process will not successfully complete.

Before the download process is scheduled to begin, please check the following:

- If your site is using c-tree Server, and c-tree Server was not installed in the default destination folder (C:\FairCom\v7.12\c-treeServers\c-treeServer), you must update the <StartCtreeServerExePath> and <StopCtreeServerExePath> settings with the drive and path for the c-tree Server executable (ctsrvr.exe) and the Server Stop utility (ctstop.exe) to the eprescriptiontaskconfig.xml file. See the **Updating your c-tree Server Executable Settings** section below for step-by-step instructions.
- The Practice Partner Login screen must be closed on all user workstations. If the Login screen is not closed, users will receive a perror, and they will have to re-start the application when they return to their workstations.
- If your site uses Practice Partner Zoom, make sure all users are logged off.
- If your site is using c-tree Server, make sure no Practice Partner utilities are currently running. When c-tree Server is shut down in step #2 below, if a utility is running the utility may stop responding.

When the ePrescribing Formulary Download process begins, the following occurs:

1. A "zip" archive file containing formulary data (formularytables.zip) is downloaded from the Practice Partner clearinghouse and saved to the ppart\tempfrml folder, then unzipped.
2. The process waits until all the users are logged out of the system, and then:
    - Shuts down the Practice Partner ePrescription Server.
    - **(c-tree Server sites only)** Shuts down c-tree Server.
    - Deletes old formulary files (the ones previously downloaded).

- Moves the new formulary files from the ppart\tempfrml file to the destination folders. The files will be moved to your \ppart folder, unless you store your formulary files in a different location, as specified by the settings in the pmsi.ini file.
- **(c-tree Server sites only)** Starts the c-tree Server.
- Starts the Practice Partner ePrescription Server.

If the download process or moving the new formulary files to the ppart\tempfrml file was unsuccessful the ePrescribing Formulary Download process will try again every 30 minutes for up to 12 hours. If after 12 hours the process has still failed, a message will be sent to the Administrative Operator (as designated in the ePrescribing Configuration Utility). If the downloader is unable to send a message to the Administrative Operator (e.g., the database is offline, etc.) a message will be logged to the Windows Event Log. After 12 hours have expired, the ePrescribing Formulary Download process will not try to download and/or move the files until the next scheduled download. If this occurs, and you would like to download the files before the next scheduled download, you can use the ePrescribing Configuration Utility to schedule an earlier date, see the *Scheduling the ePrescribing Formulary Download Process* section for more information.

Updating your c-tree Server Executable Settings

If you did not choose to install c-tree Server in the default destination folder (C:\FairCom\v7.12\c-treeServers\c-treeServer) during the c-tree Server installation you must update the "<StartCtreeServerExePath>" setting with the drive and path of the c-tree Server executable (ctsrvr.exe) and the "<StopCtreeServerExePath>" setting with the drive and path of the Server Stop utility (ctstop.exe) to the eprescriptiontaskconfig.xml file. If you do not update these settings the formulary download process will not be able to run.

To update the settings to the eprescriptiontaskconfig.xml file:

1. Open Windows Explorer and browse to your database directory (usually p:\ppart).
2. Make a backup of the eprescriptiontaskconfig.xml file. For example, copy the file and rename it as eprescriptiontaskconfig.bak.
3. Use WordPad, Notepad, or another text editor to open the file.
4. Under the **<RxHub>** section, update the settings with the drive and path of the c-tree Server files (ctsrvr.exe and ctstop.exe).
   - To specify the ctsrvr.exe path, update the following setting:
     `<StartCtreeServerExePath>drive:\path\ctsrvr.exe</StartCtreeServerExePath>`
     (where drive is the drive letter, and path is the directory where c-tree server is installed)
   - To specify the ctstop.exe path, update the following setting:
     `<StartCtreeServerExePath>drive:\path\ctstop.exe</StartCtreeServerExePath>`
     (where drive is the drive letter, and path is the directory where c-tree server is installed)
5. When you are finished, save the file.

Sending a new prescription to pharmacies electronically

Note: To send prescriptions to pharmacies electronically, the provider associated with the prescription must have the following information entered in the system: DEA number, NPI, RxHub ID, SureScripts ID, last name, practice address, and practice phone number.

To send a new prescription:

1. On the **Rx/Medications** screen, click the **New** button to open the **Prescription** screen.
2. Complete the information on the **Prescription** screen.
   - A prescription template may be used to complete some of the information. A template search may be made by either the drug name or template code, or by indications.
3. Select the **Transmit immediately** or **Transmit as a group** option from the **Print** drop-down list.

   Important Notes:
   - If the prescription is for a medication designated as a controlled substance by the United States Drug Enforcement Administration, and the ppart.ini file setting, "BlockTransmissionofControlled" for the controlled substance level is set to ON, you will receive a warning message. Your system administrator can use the controlled substance settings in the ppart.ini file to prevent operators from printing, faxing, or electronically transmitting prescriptions for medications that have a certain "schedule" level as controlled substances.

   These settings have been introduced to provide flexibility in behavior of the prescribing module of Practice Partner Patient Records in the event that laws and regulations regarding prescribing controlled substances change in the near future. They are not intended to facilitate circumventing such laws and regulations. It is the responsibility of every Practice Partner customer to ensure that your use of the system complies with applicable federal, state, and local laws and regulations regarding prescribing.

   - For electronic prescriptions, you must enter an amount to dispense in the **Amount** field. If you do not enter an amount, you will receive a warning message.
4. Click **OK**.

   The system will display warnings about drug interactions, prompts regarding adding health maintenance templates, and prompts for signatures or PINs as appropriate. See the **Rx/Medications** Help topic for more information.

   Note: Prescriptions waiting to be transmitted or printed are highlighted in turquoise.
5. Click the **Close** button on the Rx/Medications screen to send the prescription(s) to the pharmacy.

   If the patient is associated with more than one active pharmacy or no pharmacies the Pharmacies for Patient screen appears after you have clicked the **OK** button. This screen displays the pharmacies associated with the patient (added from the **Patient Configuration** tab). If the patient has mail-order pharmacy benefits the Pharmacies for Patient list will include also the pharmacy(ies) representing the patient's PBM(s) even if they are not associated with the patient. Highlight the pharmacy in the list that you want to send the prescription to, and then click the **OK** button.

   Note: If the patient only has one PBM mail-order pharmacy, and the prescription(s) is/are already being routed to the pharmacy (e.g., because that pharmacy was already specified on the Prescription screen, or is the patient's default pharmacy), then the **Pharmacies for Patient** screen will not be displayed.

You can also click the **Pharmacies** button to open the **Select Pharmacy ID** screen. This screen displays a list of all pharmacies in your system's database. Highlight the pharmacy in the list that you want to send the prescription to, and click the **OK** button. Practice Partner will ask if you want the selected pharmacy to be added to the patient's pharmacy list. Click **No** to select the pharmacy without adding it to the patient's list. If you select **Yes**, the **Link Pharmacy to Patient** screen appears. Fill in the fields on this screen, and click the **OK** button. The pharmacy is added to the Pharmacies for Patient list. Click the **OK** button to transmit the prescription.

- If you selected the **Transmit immediately** option when specifying Print options on the Prescription screen, then when you click the **OK** button, Patient Records will immediately proceed to the steps necessary to transmit the prescription.
- If you selected the **Transmit as a group** option, the prescription is transmitted when you click the **Close** button on the Rx/Medications screen.

If there is a problem with the transmission of your prescription to the pharmacy, the operator assigned to receive ePrescribing messages for the provider (see above) will receive an error message in his or her Practice Partner message inbox. The message will include a description of the problem and also reference numbers which may help Practice Partner support personnel if they need to be consulted. See the **Messaging System** Help topic in Patient Records Help for a complete overview of the Practice Partner Messaging system.

Important: Incoming ePrescribing-related messages, including error messages, are delivered to the operator specified on the ePrescribing Configuration Utility's **Messaging Configuration** tab. This information must be configured to ensure that error messages are being sent to the correct provider. See the **Messaging Configuration Tab** section for a complete explanation.

See the **Rx/Medications** Help topic for a complete explanation of the fields on the **Prescription <New>** screen.

Refill Requests

Refill requests are delivered to Practice Partner users via the Practice Partner messaging system. When you receive a refill request, you may approve or deny the request, or select "Change" to instruct the pharmacy to fill a prescription which differs from what they have requested. Once you have selected one of the options, your response will be sent back to the pharmacy via the ePrescribing module.

Note: The ePrescribing module uses the Practice Partner messaging system to send refill requests. You must use the ePrescribing Configuration Utility's **Messaging Configuration** tab to specify the provider ID and operator ID cross-reference relationships, to ensure that refill requests are sent to the correct operator. See the **Messaging Configuration Tab** section for more information.

Viewing and Responding to Refill Requests

To view and respond to a refill request:

1. To open the **Messages** screen, do either of the following:
   - Click **Msg** on the toolbar.
   - From the **Task** menu, select **Messages**.
2. In the message pane, select the message and click the **View** button. Otherwise, double-click the message. The message opens in the **View Message** screen, including the details of the refill request.

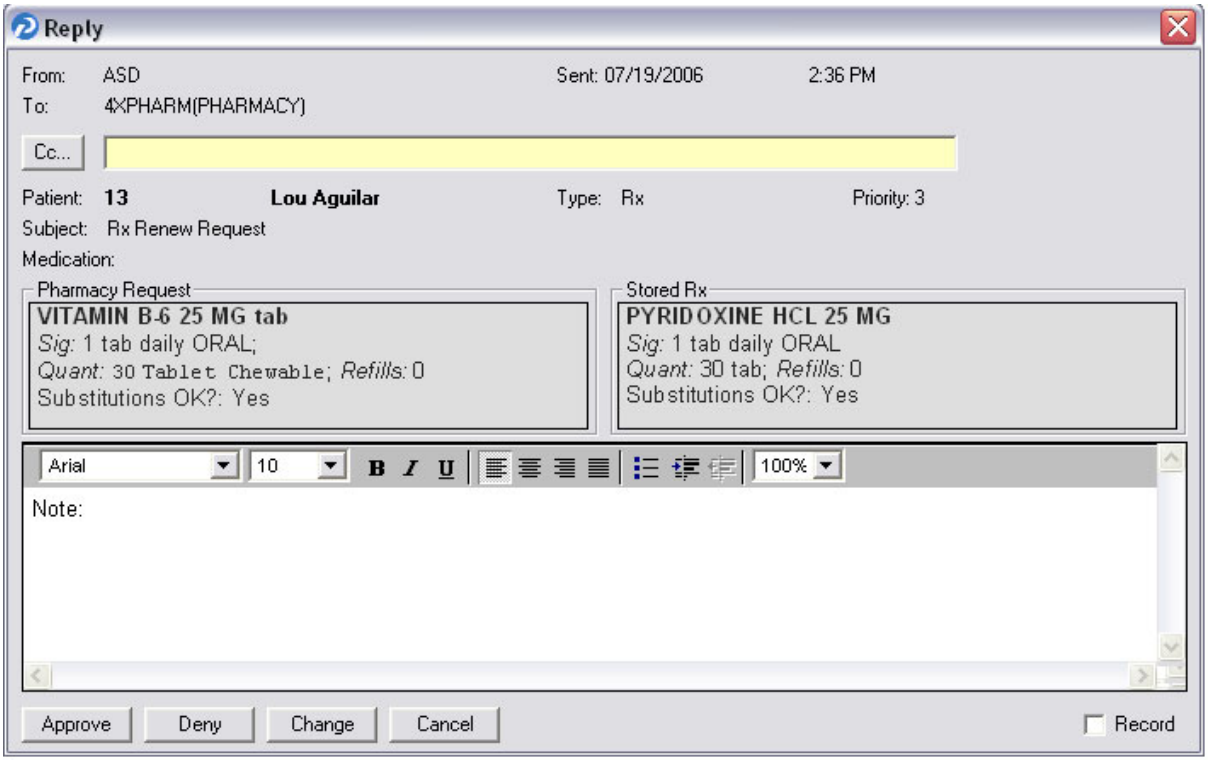
   Important: You can forward refill requests to operators. To forward a refill request click the **Forward** button. The **Operator Select** screen appears. Select the operator you want to forward the message to and click **OK**. The message will be sent to the operator with the following note at the top of the message window:

   "This refill authorization was referred to you by user "and then your Operator ID.
3. On the **View Message** screen, click the **Reply** button.

   If Practice Partner can't match the patient in an inbound refill request message to a patient in the database, it will still send the request to the Inbox of the designated operator for the provider. When you click **Reply** it will allow you to use the **Patient Lookup** function to select the appropriate patient to associate the patient with the refill request, or to indicate that the patient in the refill request is not a patient in your system.

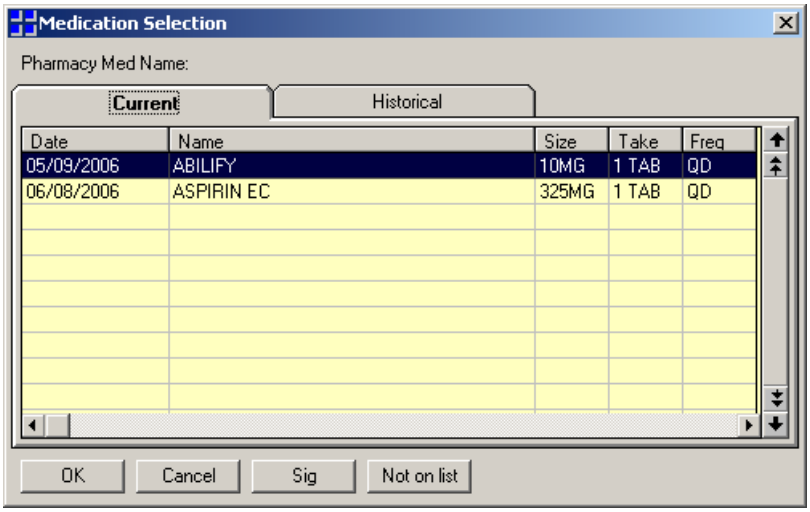
   If a patient match was found, then Practice Partner will attempt to match the medication information sent from the pharmacy to the medications on the patient's current medication list. If it finds a match, it will display in the header of the "Reply" screen the prescription details from the pharmacy, side-by-side with the details of the prescription in your Practice Partner database to which it was matched. ***It is very important that you examine this information carefully to ensure that the match is correct.***

   If you approve the refill request, this will instruct the pharmacy to fill the medication according to the details of their original request.



Reply screen

If Practice Partner cannot find a medication on the patient's current medication list which matches what the pharmacy has requested, then when you click **Reply**, Practice Partner will display the "Medication Picker" dialog, which allows you to manually pick a medication from the patient's medication list that matches the refill request. This step allows for situations where the patient's medication list does include the medication that the pharmacy has requested but because of slight differences in spelling etc. was not recognized by Practice Partner as indicating the same medication. If the patient's medication list does not contain the medication requested by the pharmacy, click the **Not on List** button (you will then be prompted to deny the refill request).



Medication Selection screen

Click the **Approve**, **Deny**, or **Change** button to approve, deny, or change the refill request.

If you have configured Practice Partner to require Electronic Signatures for prescriptions, then the user is prompted for a provider signature or PIN. If the current operator does not have prescription-signing authority, they will receive the following message:

"You do not have the authority to sign prescriptions. Please select another user to handle this refill request."

Click **OK** to forward the message to an operator who has prescription-signing authorization. The **Operator Select** screen appears. Select an operator from the list, and click **OK**. If the selected operator is authorized to sign prescriptions, the message will be forwarded to the operator. You will receive a message if the selected operator does not have prescription-signing authorization. Click **OK** to select another operator from the **Operator Select** screen. Click **Cancel** to cancel the prescription approval or change.

Important: If the prescription is for a medication designated as a controlled substance by the United States Drug Enforcement Administration, and the ppart.ini file setting, "BlockTransmissionofControlled" for the controlled substance level is set to ON, you will receive a warning message when you click the **Reply** button. Your system administrator can use the controlled substance settings in the ppart.ini file to prevent operators from printing, faxing, or electronically transmitting prescriptions for medications that have a certain "schedule" level as controlled substances.

These settings have been introduced to provide flexibility in behavior of the prescribing module of Practice Partner Patient Records in the event that laws and regulations regarding prescribing controlled substances change in the near future. They are not intended to facilitate circumventing such laws and regulations. It is the responsibility of every Practice Partner customer to ensure that your use of the system complies with applicable federal, state, and local laws and regulations regarding prescribing.

- **Approve**: Select this option to approve the refill request as is. The **Refills** screen appears. You can change the number of refills by entering a new number in the corresponding field. When you are finished, click the **OK** button.

  Note: If the current active provider is different than the provider who wrote the prescription, the **Provider** screen will appear after **Approve** is selected. You may select a different Provider ID from the drop-down list. When finished, click the **OK** button.

  Important: The **Approve** button will be disabled if the medication selected is a controlled substance. You cannot electronically send a prescription for a medication designated as a controlled substance by the United States Drug Enforcement Administration. If you attempt to do so, you will receive a warning message.
- **Deny**: Select this option to deny the refill. The **Reason for Denial** screen appears. Select the Code Option radio button to select from a list of pre-defined reasons for the denial. Select the Customer radio button to enter your own reason for denial in the corresponding field. When finished, click the **OK** button.
- **Change**: Select this option to change the refill. The **Prescription** screen appears. The Date and Medication are the only fields populated from the original prescription. When you have finished making your changes, click the **OK** button to send the refill change to pharmacy.

  Important: You cannot change the print type or the pharmacy.

  Click **Cancel**, to cancel the changes. Click **OK**, to save the prescription.

  This will send a reply back to the pharmacy.

  Once you have replied to the refill request, the message will be moved from your Inbox to the "Archived" folder.

If there is a problem with the transmission of your prescription to the pharmacy, the operator assigned to receive ePrescribing-related messages for the provider (see above) will receive an error message in his or her Practice Partner message inbox. The message will include a description of the problem and also reference numbers which may help Practice Partner support personnel if they need to be consulted. See the **Messaging System Help** topic in Patient Records Help for a complete overview of the Practice Partner Messaging system.

Technical Note: When you approve an ePrescribing refill request, you will be approving one more fill than the number of refills listed. For example, if an Rx is renewed with 1 refill, this will authorize 2 total prescription fills by the pharmacy. If the number of refills is zero, then only 1 Rx fill will occur. This corresponds to standard conventions on written prescriptions, but is emphasized here for clarity.

Pharmacy Benefit Eligibility Queries

You can receive real-time information about patients' eligibility for pharmacy benefits with the Practice Partner ePrescribing module. The patient's eligibility will be refreshed automatically when their chart is opened (unless a successfully eligibility query has occurred in the prior 24 hours). The results of the eligibility check will be displayed on the **Rx/Medications** screen's **Eligibility** tab.

You can also do an on-demand pharmacy eligibility check using the **Check/Recheck Eligibility** button on the **Rx/Medications** screen. If the eligibility check is successful the pharmacy benefits eligibility data will be displayed in the **Rx/Medications** screen's **Eligibility** tab. The **Eligibility** tab displays the outcome (i.e., successful or unsuccessful) of the eligibility check and the date that the request was sent. If there is existing data in the tab, it will be replaced with the most recent pharmacy benefits eligibility data.

Note: If no data has ever been received for the patient, the tab will display, "No pharmacy benefits eligibility has ever been sent for this patient."

In order to send an eligibility request for a patient there must be a Practice Partner RxHub ID for the Provider/Practice under which you are logged into. If you are logged into a Provider/Practice that does not have a Practice Partner RxHub ID, or if there is no logon Provider and/or Practice the eligibility request will not be sent. You can enter the RxHub ID from the Practice Providers screen. The provider must also have a National Provider Identifier (NPI) and a Drug Enforcement Agency (DEA) number recorded. See the **Adding NPIs and DEAs to your System** section for more information.

Checking and printing pharmacy benefits eligibility data

To check eligibility from the Rx/Medications screen:

1. On the **Rx/Medications** screen, click the **Eligibility** tab.
2. Click the **Check/Recheck Eligibility** button. Practice Partner will keep you updated with the status of the query. When the query is complete, the response will be displayed in the **Eligibility** tab.

   Note: If the eligibility check did not work you will receive a message letting you know the reason why. You can make the needed changes, and then re-try by clicking the **Check/Recheck Eligibility** button.

To print the pharmacy benefits eligibility data:

- On the **Rx/Medications** screen, click the **Eligibility** tab. Click the **Print** button.

Formulary Checking

You can use the formulary checking feature to see the formulary status of a drug for a particular patient when writing a new prescription, editing an existing prescription, or renewing a prescription. The provided formulary information allows you to review details regarding the patient's Pharmacy Benefits Manager's coverage for a medication, including formulary status (e.g., "Preferred," "Non-Preferred," etc.), copay amounts, alternative medications that have a more preferential formulary status, other medications which the Pharmacy Benefits Manager requires the patient to try (if clinically appropriate) before the medication will be covered, and links to additional information.

Before using the formulary checking feature you must run a pharmacy benefit eligibility query for the patient you want to check formulary information for. This is done automatically when you open a patient's chart. You can also click the **Eligibility** button on the **Prescription** screen to send an eligibility request, and if information is received while you are still using the screen, the **Formulary** area of the **Prescription** screen will be updated with the acquired eligibility information. See the **Pharmacy Benefit Eligibility Queries** section for more information about sending an eligibility query.

Note: You can specify the number of days to look back for formulary data on the **Rx Defaults** tab of the Prescription Defaults screen. See the **Optional Configuration Settings** section for more information.

Using the Formulary Checking feature

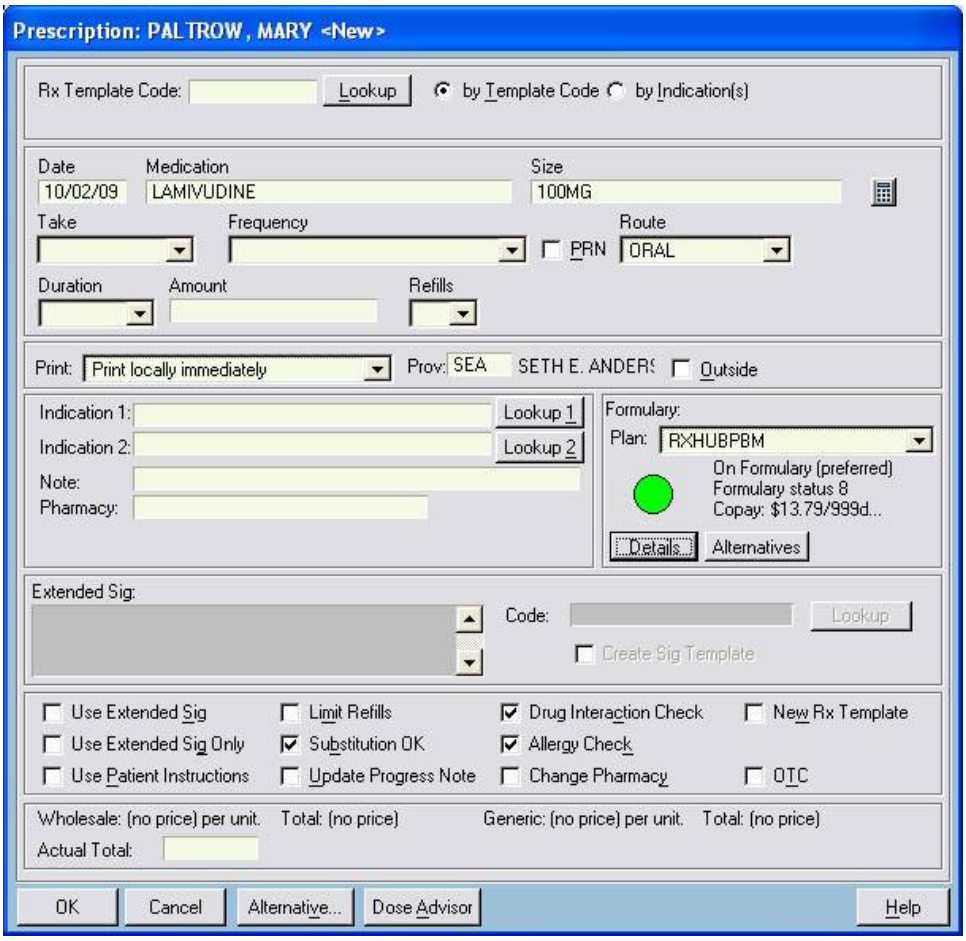
In order to receive formulary information you must at least enter the medication name, size, and route. As soon as you have entered enough information on the Prescription screen to allow identification of the medication, Patient Records displays formulary data for the health plan selected in the Plan dropdown menu in the Formulary section of the screen, using the information from the most recent pharmacy benefits eligibility response. Each entry on the list represents a different health care coverage, as identified for the patient during the last pharmacy benefits eligibility check. If a patient has more than one health plan providing prescription benefits, there may be more than one option on the drop-down menu. The default value for the Plan field is the first health plan from the eligibility response. To view formulary data for a different plan, click the arrow button to open a list of the available plans and select the desired one.

Once the formulary check is complete for the selected health plan, one of the following formulary statuses will be displayed in the **Formulary** section of the Prescription screen:

- **Not Covered**: This response is displayed when the medication has a Formulary Status of non-reimbursable (0) or is subject to coverage exclusions (including coverage exclusions based on patient's age or sex). This means that the patient's Pharmacy Benefits Manager's formulary does not provide any coverage for this medication for the patient.
- **Non-Formulary**: This response is displayed when the medication has a Formulary Status of non-formulary (1). A status of non-formulary means that the prescription drug is not on a particular plan's formulary. Non-formulary drugs are often covered by the health plan, but at a higher patient co-pay.
- **On Formulary (non-preferred)**: This response is displayed when the medication has a Formulary Status of non-preferred (2).
- **On formulary (preferred)**: This response is displayed when the medication has a Formulary Status of preferred (3-99).
- **Formulary status cannot be determined**: This response is displayed when the medication's formulary status cannot be determined.

Co-pay information will be displayed in the **Formulary** section if there is a value for Copay_Tier for the medication and the "Non-Formulary", "On Formulary (non-preferred)", or "On Formulary (preferred)" results were returned. For example:

On Formulary (preferred)
Formulary status 8
Copay: $13.79

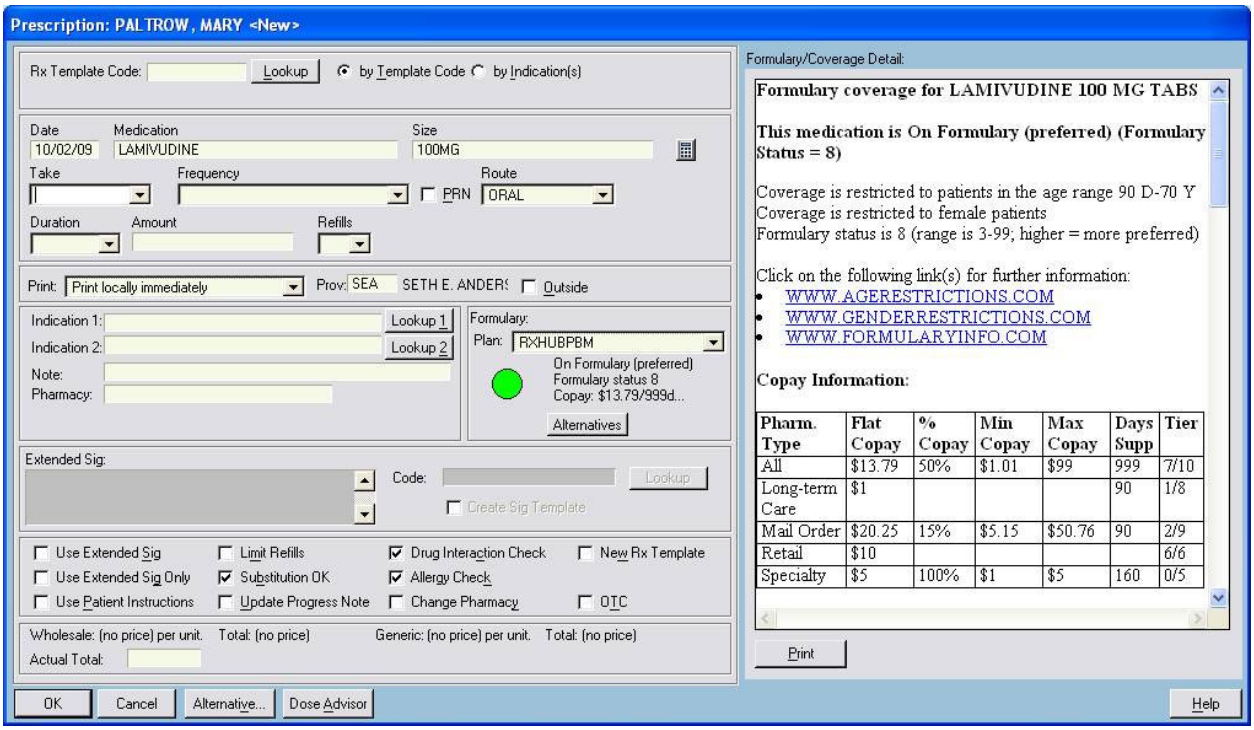


Prescription screen

Formulary Details

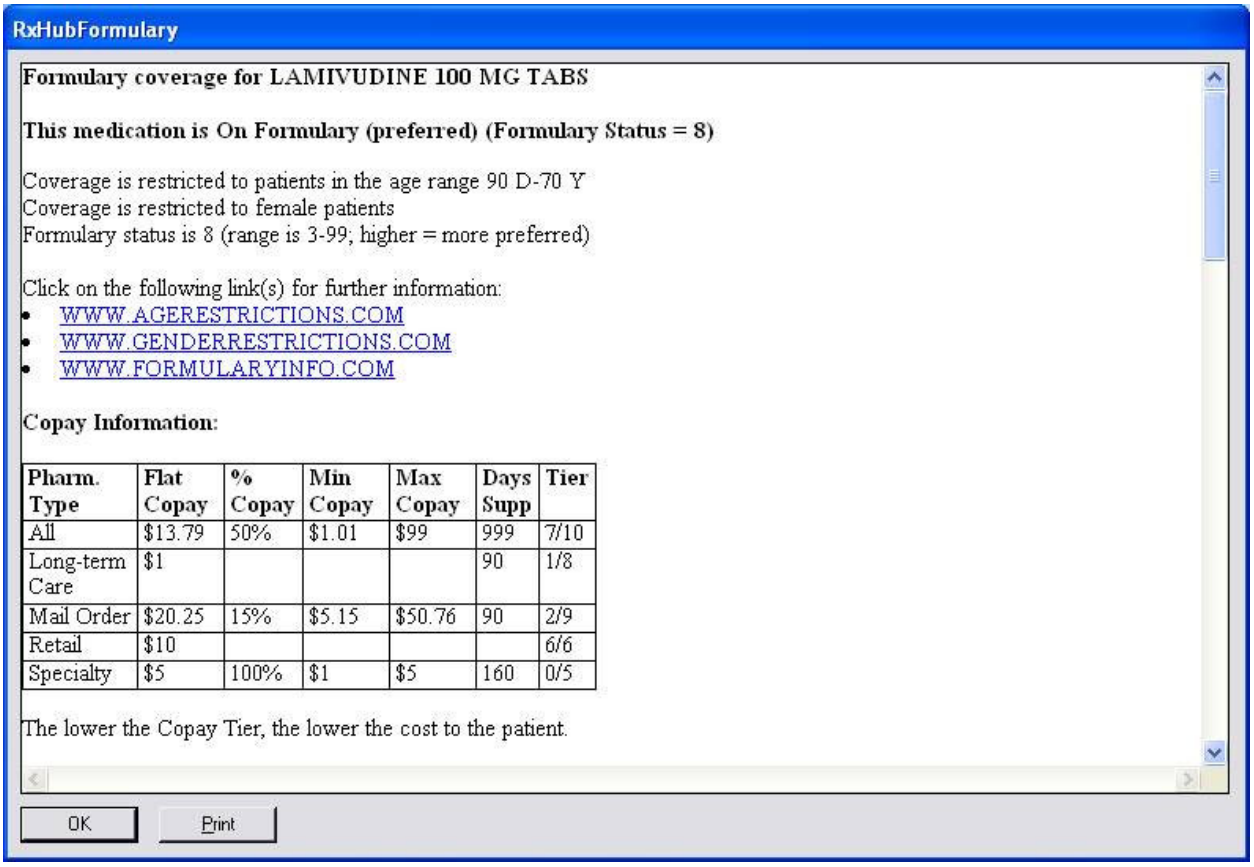
The **Formulary Details** section allows you to view any additional information about the coverage for the medication, based on the patient's health plan coverage.

The "ShowCoverageDetailsOnPrescriptionDialog" setting in the [Rx] section of the Ppart.ini file controls whether or not the system shows detailed formulary and coverage information on the Prescription screen itself. If this setting is set to ON, the additional information about the coverage for a medication (formulary status, quantity limits, copay information, alternative information, etc.) will display in the Formulary/Coverage Detail pane of the Prescription screen, as shown below:



Prescription screen

If the "ShowCoverageDetailsOnPrescriptionDialog" setting is set to OFF, the Formulary Details will be hidden from view and will display on a separate screen accessible through the **Details** button in the **Formulary** section of the Prescription screen.



Formulary Details screen

You can click the **Alternatives** button to view the list of alternative medications with a more preferential formulary status. If there is no such data, the **Alternatives** button will be greyed out. You can select one of the alternative medications by clicking on the name of the medication in the list. After selecting the alternative medicine you will be returned to the **Prescription** screen. The alternative medicine name will be displayed in the **Medication** field. Patient Records will then perform a formulary check on the alternative medication selected by the user. See the Alternative Information explanation below for an overview of the information included on this screen.

Note: You cannot select an alternative medication when checking formularies while renewing a prescription.

You can print the formulary information on this screen by clicking the **Print** button.

The "Details" will display all information provided by the patient's Pharmacy Benefits Manager about coverage for the medication. Any or all of the following categories may be included:

- **Formulary status:** This section displays the formulary status.
  - **Not Covered:** This response is displayed when the medication has a Formulary Status of non-reimbursable (0) or is subject to coverage exclusions (including coverage exclusions based on patient's age or sex). This means that the patient's Pharmacy Benefits Manager's formulary does not provide any coverage for this medication for the patient.
  - **Non-Formulary:** This response is displayed when the medication has a Formulary Status of non-formulary (1). A status of non-formulary means that the prescription drug is not on a particular plan's formulary. Non-formulary drugs are often covered by the health plan, but at a higher patient co-pay.

- **On Formulary (non-preferred):** This response is displayed when the medication has a Formulary Status of non-preferred (2).
- **On formulary (preferred):** This response is displayed when the medication has a Formulary Status of preferred (3-99).
- **Formulary status cannot be determined:** This response is displayed when the medication's formulary status cannot be determined.

  If the medication is not covered because of the patient's age or gender, this is indicated.

  Resource links may be provided for the coverage exclusion(s) or formulary status. You can click on these links for further information.

- **Quantity Limits:** This section displays information about limits imposed by the Pharmacy Benefits Manager as to the quantity of medication that can be dispensed to the patient (either in one fill event or over a time interval).
- **Copay information:** This section displays information about the copay for which the patient will be responsible if the medication is prescribed. If the medication has a Formulary Status of non-reimbursable (0) or is subject to coverage exclusions (excluding coverage exclusions based on patient's age or sex), then the copay information section will not show any copay information for the medication. Since copay requirements may be different for different pharmacy types, this information is displayed in a tabular format.
- **Alternative Information:** This section displays alternative medications in two sections. Drugs that are specifically identified as alternative medications by the Pharmacy Benefit Managers (PBM) in their formulary tables are displayed in the first table. The second table displays medications in the same therapeutic class as the medication you selected which have an equal or higher formulary status with the patient's Pharmacy Benefits Manager.

  You can select one of the alternative medications by clicking on the name of the medication in the list. After selecting the alternative medicine you will be returned to the **Prescription** screen. The alternative medicine name will be displayed in the **Medication** field. Patient Records will then perform a formulary check on the alternative medication selected by the user.
- **Prior authorization requirements apply to this medication:** If prior authorization information exists, this section displays links to additional information.
- **Medical Necessity requirements apply to this medication:** If medical necessity information exists, this section displays links to additional information.
- **Step Therapy requirements apply to this medication:** If step therapy information exists, this section displays links to additional information.
- **Step Medication requirements apply to this medication:** This section displays step medication information. Information is displayed in this section when the patient's health plan stipulates that the medication will only be covered if therapy with certain other medications has been attempted (if clinically appropriate).
- **Additional information from the pharmacy benefits manager:** This section displays the text message in the formulary data.

  Resource links may be provided. You can click on these links for further information.

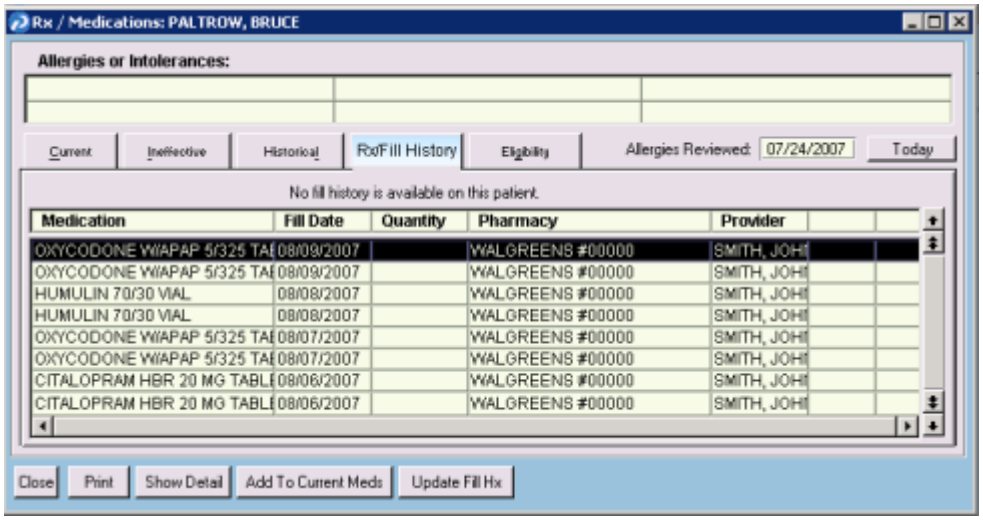
Viewing Pharmacy Fill Events

The **Rx Fill History** tab on the **Rx/Medications** screen displays pharmacy fill events downloaded to your system from the patient's Pharmacy Benefits Manager(s). This feature allows you to see details of what medications your patient is actually obtaining from pharmacies, whether they were prescribed by you, another provider at your practice, or a provider outside your practice. You can review detailed information about a prescription by selecting the prescription from the list and clicking the **Show Detail** button. The **Medication Fill History Detail** screen will appear with detailed information about the prescription. You can refresh the fill history by clicking the **Update Fill Hx** button, which will initiate a live download of data from the patient's Pharmacy Benefits Manager(s).

You can also easily update the patient's **Current Medications** list by clicking the **Add To Current Meds** button. This will add the selected medication to the **Current Medications** list as shown in the **Current** tab of the **Rx/Medications** screen.

To view pharmacy fill events:

- On the **Rx/Medications** screen, click the **Rx Fill History** tab.



Rx / Medications screen - Rx/Fill History tab

To print a prescription in the Rx Fill History list:

- On the **Rx/Medications** screen, click the **Rx/Fill History** tab. Select the fill history event(s) that you want to print from the list. Click the **Print** button.

Optional Configuration Settings

Method for Recording Patient Consent

If needed, your system administrator can specify the approach for recording patient consent to collect prescription fill history by adjusting the ppart.ini file setting, "RxFillHxCheckConsent."

When this setting =OFF, patient consent will be gathered based on your sites recording method preference (e.g., general care consent forms). This is the default setting.

When this setting =ON, patient consent will be recorded using the **Rx Fill Hx OK?** field on the **Other Data** tab of the Patient screen. If this method is selected, you must add **Rx Fill Hx OK?** as a user-defined Patient field. Once entered, the **Rx Fill Hx OK?** field will appear on the **Other Data** tab of the Patient screen. You will then need to establish a workflow where patients (or, for minor patients, their guardian) are informed that their pharmacy benefits provider provides information about the medications they have had filled at retail and mail-order pharmacies, and asked for their consent to request that data for medications prescribed by all providers, providers at your site, or not at all. You can enter the following values in the **Rx Fill Hx OK?** field based on the patient's response:

- Enter "Y" if the patient gives consent for all providers.
- Enter "P" if the patient gives consent for providers at your site.
- Enter "N" if the patient does not give consent.

To add "Rx Fill Hx OK?" as a user-defined Patient field:

1. Select Maintenance > Configuration > Define Other Data > **Patient**. The Patient Define Other Data Select screen appears.
2. On the Patient Define Other Data Select screen, click the **New** button.
3. Enter `Rx Fill Hx OK?` in the **Label** field, select **Text** from the **Type** drop-down list, and select **1 Character** from the **Length** drop-down list. Enter a description, then click the **OK** button.

To enter a patient's consent response:

1. Select File > **Open Patient**, or click the **Patient** button in the toolbar. The Lookup screen appears.
2. Enter the search criteria and filters you want to use to narrow the search.
3. Click the **Lookup** button.
4. In the search results table, highlight the appropriate patient and click the **OK** button. The Patient screen appears.
5. Click the **Other Data** tab. Enter the patient's consent response in the **Rx Fill Hx OK?** field. You can enter one of the following values:
    - Enter "Y" if the patient gives consent for all providers.
    - Enter "P" if the patient gives consent for providers at your site.
    - Enter "N" if the patient does not give consent.
6. When you are finished, click the **OK** button.

Specify the Number of Days to Look Back for Formulary Data

The **Number of days back to look for formulary** setting allows you to adjust the maximum number of days the on-file eligibility data for a patient can be for the formulary information references to be displayed to the user in the **Formulary** section on the **Prescription** screen. The default number of days is 7. You can specify the number of days to look back for formulary data on the **Rx Defaults** tab of the Prescription Defaults screen.

To specify the number of days to look back:

1. Select Maintenance > Configuration > **Prescription Defaults**. The Prescription Defaults screen appears.
2. Click the **Rx Defaults** tab.
3. Select the maximum number of days from the **Number of days back to look for formulary data** drop-down list.

Troubleshooting

This section offers some troubleshooting tips for your electronic prescribing connection. If the ePrescribing interface is not working properly check the following. Contact Practice Partner Customer Support if these suggestions do not immediately correct the issue.

Did you select the "Transmit immediately" or "Transmit as a group" print option?

In order for the prescription to be sent via the ePrescribing module, you **must** select the "Transmit immediately" or "Transmit as a group" print option when writing a new prescription.

Do you have Internet connectivity?

Verify that you have constant Internet connectivity from the server.

Are the Practice Partner Services running on your computer?

You can use the PMSI Service Manger to check the status of Practice Partner Services and turn them on and off.

To start the PMSI Service Manger:

1. Open Windows Explorer, and navigate to your \ppart directory (usually p:\ppart). The PMSI Service Manager must be run locally from the server.
2. Double-click the PMSI.Networking.Services.Manager.exe. The PMSI Service Manager screen appears.
3. Is the PMSI Application Server status, "Running"? If the status is "Stopped", click the **Start** button. Windows will start the PMSI Application Server and the status will change to "Running".

IMPORTANT:

- If your site uses Web View it is advised that the services be restarted during off peak hours to ensure no users will be affected.
- You should not stop the services when there are users still running Patient Records and/or Medical Billing. The services can be stopped with clients still connected, but it is advised that all clients disconnect.

Is the ePrescription Server running?

1. Start the Pharmacy Download Utility. Double-click the **PMSI.ePrescriptionConfiguration.exe** in the \ppart directory. This opens the ePrescribing Configuration Utility.
2. Click the **Status** tab. Click the **Start ePrescription Server** button. This will start the ePrescription Server.

Contact Practice Partner Customer Support if this does not correct the problem.