Introduction

Welcome to PrescribeWellness PrescribeCare. PrescribeCare enhances the role of community pharmacists in providing integrated clinical services to their patients. With this product, you’ll find that the patient-care process allows all members of the patient’s healthcare team, especially the pharmacist, to communicate information seamlessly.

Use this guidebook to learn how to:

- Get started using PrescribeCare
- Create a patient encounter
- Document information pertaining to the patient encounter, including:
  - Overview information
  - Patient information
  - Medication information
  - Food, medication, and environmental allergies
  - Patient goals
Getting Started

Beginning the Encounter

The Encounter begins by locating the patient profile. Search for the patient by clicking on the magnifying glass in the control panel within the Patient Engagement Center (PEC) and typing in the patient’s first name, last name, or the last 4 digits of the patient’s phone number.

The patient name will pop up below the search bar. Click on the patient name to get to the patient profile. The patient risk score can be found on the left side of the patient profile in the patient badge, under Safety.

Click on the PrescribeCare tab to open up the PrescribeCare dashboard. Click on Add Encounter, located on the right side of the screen, to begin documenting the patient encounter. Please remember that only one encounter can be open at a time. If there is an encounter that’s listed as In Progress, a new encounter cannot be created until that encounter has been completed.

If the patient is a new patient and not in the pharmacy’s PMS, you can add a new patient by clicking on the gear icon in the control panel and clicking on Add Patient.
Verify Patient Information

Overview Tab

Once the patient profile has been pulled up, the Verify Patient Information window will appear. Begin by filling in the various fields in both the Overview and the Patient tabs.

In the Overview tab, you’ll need to complete the following:

1. To select the Type of encounter, click on Select... and select either Initial or a Follow-up.
2. To select a Class, click on Select... and select either Telephonic or Face-to-Face.
3. To select an Encounter Reason, click on Select... and choose from the drop down menu. Note that the reason selected will be the “name” of this encounter.
4. To select referral options, click on Select... to fill in either the **Referral to** or **Referral from** fields, depending on whichever is appropriate for the encounter. If you are referring the patient to another healthcare provider, select **Referral to** and choose from the drop down menu. If the patient was referred to your pharmacy, select **Referral from** and choose from the drop down menu.

5. To select the Time Spent, click on Select... and choose from the drop down menu. This is the time you anticipate will be spent on the encounter. This can be edited at the end of the encounter before submitting.

6. Finally, fill in the fields for Encounter Author with your name and NPI and click on **Next** to move to the Patient tab.
Verify Patient Information

Ensure all patient information is up-to-date prior to performing an encounter.

### Smithers, Scott

DOB: 1941-11-14 - Phone: 5555304671
123 Pleasant Street, Sunny Valley, CA 55555

<table>
<thead>
<tr>
<th>Overview</th>
<th>Patient</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type</td>
<td>Select...</td>
</tr>
<tr>
<td>Class</td>
<td>Select...</td>
</tr>
<tr>
<td>Encounter Reason</td>
<td>Select...</td>
</tr>
<tr>
<td>Referral To</td>
<td>Select...</td>
</tr>
<tr>
<td>Referral From</td>
<td>Select...</td>
</tr>
<tr>
<td>Time Spent</td>
<td>Select...</td>
</tr>
</tbody>
</table>

### Encounter Author

First Name

Last Name

NPI

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Verify Patient Information

Patient Tab

After you’ve completed the fields in the Overview tab, begin filling in the fields of the Patient tab.

1. Search for the patients Primary Care Physician (PCP) by typing in their name and selecting the proper physician.
2. To select the patient’s race & ethnicity, click on Select… and choose from the drop down menu.
3. To select the patient’s gender, click on Select… and choose from the drop down menu.
4. To select the patient’s insurance plan, click on Select… and choose from the drop down menu. If the patient’s insurance information is not listed in the drop down menu, you’ll need to fill it in manually. Select Manually Enter… and fill in the Plan Name, Member ID, Insurance Type, Insurance Group, Insurance PCN, and the BIN.
5. Click on Done when all information has been filled in.
6. The pop-up window will close and you’ll return to the dashboard. Click on the encounter to begin the next step.
Recording Medication(s)

Managing Medications
Click on the **Medications** tab. This tab will load all of the patient’s recent medications, grouped together by prescribing physician. The medications listed here are recent medications that have been pulled over from the Pharmacy Management System (PMS). Each listed medication notates the following:

1. **Copay/Total**: Not editable
2. **Maintenance Medication**: Not editable
3. **Medication Synced**: Not editable
4. **Last Fill/Days Supply/Quantity**: Not editable
5. **Taking**: Collected during the encounter. This notates if the patient is currently taking this medication. Click on the letter displayed and select **Y** for **Yes** and **N** for **No**. Click on **Save**.
6. **Side Effects**: Collected during the encounter. If the patient is experiencing side effects, click on the letter displayed and enter the side effect into the pop-up window. Click on **Save**. The letter will now appear as a **Y**, for **Yes**. If the patient is not experiencing any side effects, leave the selection as **N** for **No**.

   ![Transition of care - In Progress](image)

7. **Medication Therapy Problems (MTP)**: Collected during the encounter. To add an MTP, **click on the value** in this column, which is defaulted to “0”. A pop-up window will appear.
8. Click on **Add MTP** and select the proper MTP from the drop down menu.
9. Once the MTP is selected, another drop down menu will appear in the window to the right. Here, you can choose the most applicable option to further describe the MTP.
10. Add an **MTP Status** by clicking on **Add Status**. Selection can be either Active or Resolved.

11. Add an **Intervention** by clicking on **Add Intervention**. Select the type of intervention from the drop down menu. Another drop down menu will appear in the window to the right, where the intervention can be further described. Select the most applicable option. Click on **Save**.

12. Add an **Intervention Status** by clicking on **Add Status** and selecting a status from the drop down menu.

13. Click on **Add Note** in the Recommendations section. This allows you to free type your recommendation, which will be printed on the patient report. Click on **Save** to close the note.

14. Click on **OK** to close the MTP pop-up window and you'll be taken back to the medication dash board. Once an MTP is recorded, the value in the MTP column will change to account for the number of MTPs recorded. Multiple MTPs can be recorded.

Underneath each medication name, you will see both the Rx Number and the NDC. These are both not editable. Below the Rx Number and NDC, you’ll see **Add Reason** and **Add Sig**, both of which are editable and are to be collected during the encounter.
1. Click on **Add Reason** and type the indication in the search box that appears in the pop-up window. Once the proper indication has been located, click on **Save**.
2. Next, click on **Add Sig** and another pop-up window will appear. Fill in how the medication is being administered. Click on **Save**.

## Adding Medications

You might occasionally work with a patient who is taking a medication that is not listed in the profile, which can occur if the patient picks up their medications from multiple pharmacies. This medication would need to be manually entered to ensure all medications the patient is taking are accounted for.

To add a medication, begin typing the medication name in the **Add Drug** box, located directly below the **Medication** tab. Select the proper medication from the drop down list.

After entering and selecting the drug, a pop-up window will appear, where each of the following fields will need to be entered.

1. Check **Taking** if the patient is taking this medication
2. Enter **Days Supply**
3. Enter **Quantity**
4. Enter **Last Fill Date**
5. Enter **Indication**
6. Enter **SIG**
7. Enter **NDC**
8. Enter **Prescriber**
9. Enter Rx number
10. Enter any side effects
11. Click on OK

Now, you’ll return to the main medications page. For each newly added medication, you’ll need to repeat the steps for Add Reason and Add Sig. Remember that the reason denotes why the patient is taking this medication, while the sig denotes how that particular medication is being administered.

If you would like to remove a medication from the list, click on the red X next to the MTP column.

You’ll once again return to the main medications page. You can enrich physician information by specifying the role of each prescriber, such as Primary Care Physician (PCP), Nutritionist, Social
Worker, etc. To do this, click on **Specify Role** and select the appropriate option from the drop down menu. Once selected, click on **Save**.

Under each prescriber, there is an option to **Add Care Coordination Note**. Click on **Add Care Coordination Note** to write a note for the physician/prescriber. Enter in the note manually and click on **Save** when finished.

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**Recording Allergies**

**Food, Medication, and Environmental Allergies**

Next, click on the **Allergies** tab. You’ll see three types of allergies listed: food, medication, and environmental. You can add multiple allergies for each section.

Start by selecting **Yes** or **No** in the drop down menu to the right of that allergy category. If yes is selected, a second drop down menu will appear directly to the right. When opened, the most common 10 allergies for that particular category will be listed first. If the allergy you are searching for is not listed, you can select the **Search...** option to locate the appropriate allergen.
Recording Reactions and Notes

Click on **Add Reaction** to type in the allergic reaction that patient experiences when they come into contact with that particular allergen. Click on **Save**.

Click on **Add Notes** to type in a note pertaining to this particular allergen. Click on **Save**.
Recording Goals

Recording a Goal

Click on the Goals tab. In this section, you can document the patient’s goals. This section is free format text, meaning there is no drop down menu to select from and any goal can be typed directly into the box.

Begin by typing the patient’s goal into the Add a Goal… box and hit Return.

Recording a Goal Date

After hitting return, a small pop-up window will appear. Enter the date by which the patient wishes to achieve their goal into the Goal Date field.
Recording a Goal Status
Select Goal Status from the drop down menu and click on OK.
Completing the Encounter

It’s important to ensure that all of the information entered in the encounter is complete and accurate. Once an encounter is completed, changes cannot be made to that specific encounter or the information included in it. After you have verified that all information is correct, click on Save.

To submit the encounter, click on Complete. Click on Compete to verify. The completed encounter, and any previous encounters for the patient, will be listed on the screen. Once completed, the system will internally mark the encounter.

If the patient would like a copy of their encounter(s), check the box next to the encounters they would like printed. Then, click on Action and select Print selected or Print all.
**Overview**

<table>
<thead>
<tr>
<th>Patient</th>
<th>Medications</th>
<th>Allergies</th>
<th>Goals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type</td>
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<tr>
<td>Class</td>
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<td></td>
</tr>
<tr>
<td>Encounter Reason</td>
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<tr>
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<tr>
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</table>

Transition of care - Complete

Initial - Date Started: 2017-08-24

Complete

10000000706
Support

Visit PrescribeWellness University at www.university.prescribewellness.com for more training.

For support requests, please call us at 800.960.8147 or email us at support@prescribewellness.com.