Quest Diagnostics®

MedPlus

Care360 A MedPlus Solution

ePrescribing Implementation Training Checklist

Before going onsite

☐ Retrieve the information provided from the PSS, in the training mailbox.

☐ Verify with Medplus Enrollment by sending an e-mail to premiumservices@medplus.com to be sure all required paperwork has been submitted by the PSS.

☐ Schedule training with Physician's office: training should include 2–3 staff people and at least one physician. Discuss setting up a test account and ask for permissions to do this.

☐ Obtain User Enrollment Form from MedPlus Enrollment with ePrescribing usernames and request test user ID (if client has agreed).

☐ Use the test ID to login and confirm the site is set up for ePrescribing. Check volume and completeness of patient demographics in ePrescribing.

☐ Prepare MedPlus welcome folders for each ePrescribing user, up to a maximum of six per office. The welcome folder should include: Welcome Letter, Quick Starts, Pharmacy Letter, Physician Letter, Business Card.

☐ Write Quest Support numbers, both local and regional when appropriate, on Quick Starts.

☐ Send email notification of ePrescribing accounts going live to: Portal PSG Support, Premium Services; Coggin, Charlett; Roth, Dawn; Amy Hudson, Rocker, Lu; Lobdell, Eric; Schnell, Krista; Duffy, Kristen; Boyd, Bernadine; Anita Meneses, Tiffany Gutraj, Matt Dienna, and the account's PSS, TSS and Quest Sales Rep.

☐ Ensure that support will be available during the entire timeframe you are onsite for quick problem resolution. This may be your assigned Project Manager or a call into MedPlus Support. (**note* -** this is only valid for initial install. After that, Support will be handled by Quest IT.)

☐ The day before the training call and remind the staff to have a few prescriptions (new or refills) that can be used during the session.

☐ Call Support the day before onsite training session to activate SureScripts.

Onsite Training

☐ Create a new shortcut on their desktop, using the URL https://www.care360.com/eMaxx/. If they are an existing Care360 customer this may already be done; verify it works and is current.

☐ Have someone will be using the ePrescribing system regularly, log into the site with his/her username.

☐ Allow user to change password if desired.

☐ Explain they can access ePrescribing from the portlet or from the patient chart. Go into ePrescribing through the portlet.

☐ *Preferences* show how to set these up, noting these are specific to the user

1. Weight field
2. Pharmacy State Search
3. Prescription History Check for Drug/Drug Interactions
4. Pharmacy Notification of Interactions

☐ *Medication Favorites* Add a medication to the Medication Favorites list. Remember to point out that medications can be added or deleted from list at any time. The Medication Favorites list is **per office.**

☐ *Pharmacy Favorites* Add a pharmacy to the Pharmacy Favorites List – can talk the user through either performing a search for an existing pharmacy or can use “Add Pharmacy” for those that do not exist in database. If no prescriptions are available for training, add a “test” pharmacy, using the fax number for the office you’re training. Show how to edit pharmacy information. The Pharmacy Favorites list is **per office.**

☐ Discuss/show Transaction and Medication Usage Reports. Point out that all scripts, including “Data Only” scripts are included on the Transaction Report.

☐ Explain PBM Functionality

1. Eligibility: checks patient's PBM eligibility in real time
2. Formulary: checks to see if selected drug is on formulary and provides alternative formulary drug choices.
3. History: when available, shows prescription history from other providers within the same PBM plan.

☐ Add or search for a patient and begin the prescription process.
(Typically they have “refills” waiting to call into the pharmacy for patients.)

- ✓ Point out that moving the mouse over the patient’s name in eRx Patient Search results will display pop up window with patient demographic info. This is useful when multiple patients have the same first and last name.
- ✓ Explain that patient information can be edited.
- ✓ Explain Patient Insurance information – noting that the user can continue creating scripts during the retrieval process.
- ✓ Explain the use of Patient Problem List – notes to office (will be limited to 500 characters).
- ✓ Explain Allergy field.
- ✓ Drug interaction and allergy alerts will display when interacting medication is selected.

☐ Explain PBM History and More button:

1. When available, displays prescriptions written by other providers within a participating PBM plan.
2. More button displays medication timeline.
3. View Medication List supplies more detailed information.

Writing a Prescription

1. "Select Provider"
    a. If user is a clinician, this field will be defaulted. If not and there are multiple physicians, user can choose which provider is ordering meds.

2. "Select Medication"
    a. Select from favorite list or search database (updated monthly).
    b. Point out that green dot indicates formulary drugs.
    c. Red square indicates the drug is not formulary.
    d. Only appropriate doses and SIG routes for the selected medication will be available.
    e. Formulary alternatives will be displayed.
    f. Drug to drug interactions will trigger an alert when selected on the same script or based on the time frame selected for Prescription History Check in the Preferences tab.

3. "Select Pharmacy"
    a. Show how to select from favorite list, search database (updated yearly) or add new pharmacy.
    b. Pharmacy can be sorted in ascending or descending order by any underlined heading.

4. "Select Action"
    a. Explain the three different actions
        i. "Print/Submit" – this will print a copy in the office w/out a signature and fax a signed copy to the pharmacy.
        ii. "Submit" – will only fax a signed copy to the pharmacy.
        iii. "Pending" – will place the script in the Queue to be approved, denied or submitted at a later date/time.

    b. Explain the various types of users & how that corresponds to the above actions:
        i. Provider – can view, write, approve, and deny scripts. Can also run medication usage report and transaction report for himself/herself. Can only approve electronic renewals assigned to himself/herself.
        ii. Administrator – can view, write and approve scripts. Can also run medication report and transaction report for any provider.
        iii. Assistant – can view and write scripts that are "pending" only (the pending box will be checked as the default and all scripts written will stay pending until approved or denied.) Can run medication usage report only.

5. Controlled drugs
    a. Sample/handwritten is forced for CII drugs.
    b. Separate script for each CII drug is forced.
    c. System prohibits controlled drugs and non-controlled drugs on the same script.
    d. If actual script is not available, show functionality with test patient.

6. "Print/Submit script.

After Sending a Script

☐ Show and explain the Script Inbox.

1. Explain Status: Queued for Faxing, Faxed, Pending Approval, Data Only, Fax Failed, Renewal Request, and Electronically Sent.
2. Explain filter and sort options (7 days worth of history)
3. **Note: It is very important to train on how to handle a "failed fax." The customer needs to try to resend the fax. If that does not work, they need to call the pharmacy to make sure that the fax is working properly and the fax number has not changed. At that point, if the issue is not resolved, the customer can call Quest Support to escalate the issue. Customers should be monitoring the script inbox several times a day if they are writing a lot of scripts. This is especially important in order to address the renewal requests within 24 hours.**

☐ Have office staff call the Pharmacy to confirm the receipt of faxed prescription if status reads faxed.

☐ Go back into same patient as if you were going to write another script. Look at and explain Medication History in terms of quick refill process (most fields default.)

☐ Go into Care360 search for the patient's chart in which you just sent a fax for and show the script that was created. Point out physician signature on that script. All scripts, including "Data Only" scripts are integrated into patient chart.

☐ Go back into Administration and demonstrate how to run the reports.

☐ Demonstrate the auto fill function, and how it will fill in the fields according to how the script was completed the last time for that drug, not specific to the patient. This is most useful for drugs typically filled the same way, regardless of patient.

☐ Review of the office workflow:

1. Patient comes in for office visit and needs prescription.
2. Patient calls office during normal business hours for refill
3. Patient calls after hours for prescription
4. Pharmacy calls, faxes or electronically sends renewal request.

☐ Give out Quick Starts and explain how they can be used.

☐ Give out Pharmacy Letter and Customer Service numbers. Explain the Support process – calls are made to the normal Quest Help Desk number. If necessary, Quest will escalate the call to MedPlus. **Customer does NOT call MedPlus directly.**

☐ Give out your business cards and inform office that you will be available for follow up questions during the next week.

☐ Allow time for everyone that wants to practice and ask questions.

☐ Ensure they know how to contact someone if they need help.

<u>Post Installation/Training tasks</u>:

☐ Call or visit the site the next day.

☐ Make sure all users can log on properly and have the correct permissions.

☐ Follow up on any questions or concerns that they had.

☐ **Ensure they are monitoring the fax queue and that there have been NO failed faxes.**

☐ One week follow up call

☐ Two week follow up call

☐ One month follow up call

Track the sites usage for two weeks after training is completed. If usage doesn't begin or increase, call site to inquire why they're not using ePrescribing.