SuccessEHS Release Notes 7.30

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All Modules

New UDS Reporting Measures Project #EHS-20667

The current version of the UDS toolkit can be found in the **Customer Community**. The toolkit will help guide you to the appropriate data collection and reports available for UDS reporting. UDS reporting is done via Business Objects therefore you must be a current Business Objects user to access the existing UDS report library.

Changes include the following:

1. **Table 4, Selected Patient Characteristics** – The total number of public housing patients will be reported on line 26.
2. **Table 6A, Selected Diagnoses and Services Rendered** – The number of patients with a first time diagnosis of HIV will be reported on line 1-2(a).
3. **Table 6B and Table 7, Prenatal and Perinatal Services sections –** All health centers are now required to report these sections regardless of whether they receive services in the health center or are referred elsewhere.
4. **Table 6B, Quality of Care Indicators New Measure – HIV Follow-Up** – Patients first ever diagnosed with HIV by clinic staff who received a follow-up visit within 90 days.
5. **Table 6B, Quality of Care Indicators New Measure – Clinical Depression Screening** – Patients 12 and older who were screened for depression using a standardized tool and, if found to be depressed, had a follow-up plan documented.

Charge Entry

Reports, Reversed Claims Excluded from Superbill Charges Added After Checkout Report

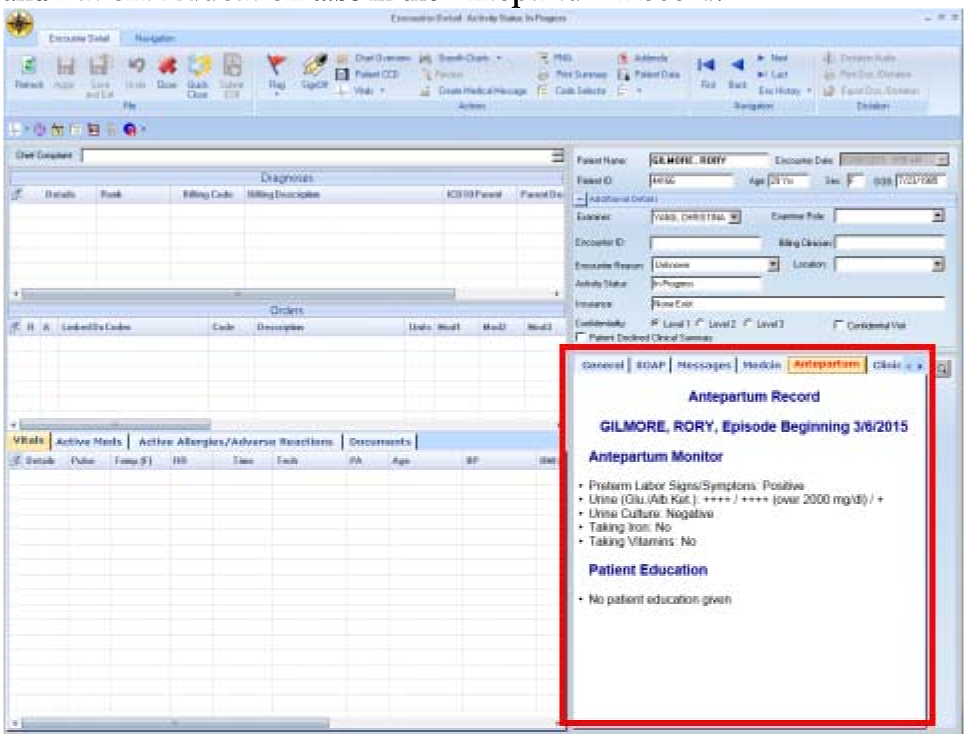
Project #EHS-20637

Reversed claims will no longer be included on the **Superbill Charges Added After Checkout Report** in **Charge Entry**.

Clinical Console

Antepartum Tab Added to Encounter Detail Window Project #EHS-20698

An **Antepartum** tab has been added to the **Encounter Detail** window in **Clinical Console** and **Chart Overview** that displays (read-only) information entered on the **Antepartum Monitor** and **Patient Education** tabs in the **Antepartum Record**.



- The **Antepartum** tab displays data for a patient's current antepartum episode; the Antepartum label will display in red text if current antepartum information is present.
- Finalized antepartum data will not display; the **Antepartum** tab will be blank in such instances.
- The tab will not display for male patients or female patients without antepartum history.
- From the Antepartum module, only information entered in on the **Antepartum Monitor** tab and the **Patient Education** tab will pull over to the **Antepartum** tab in **Encounter Details**.

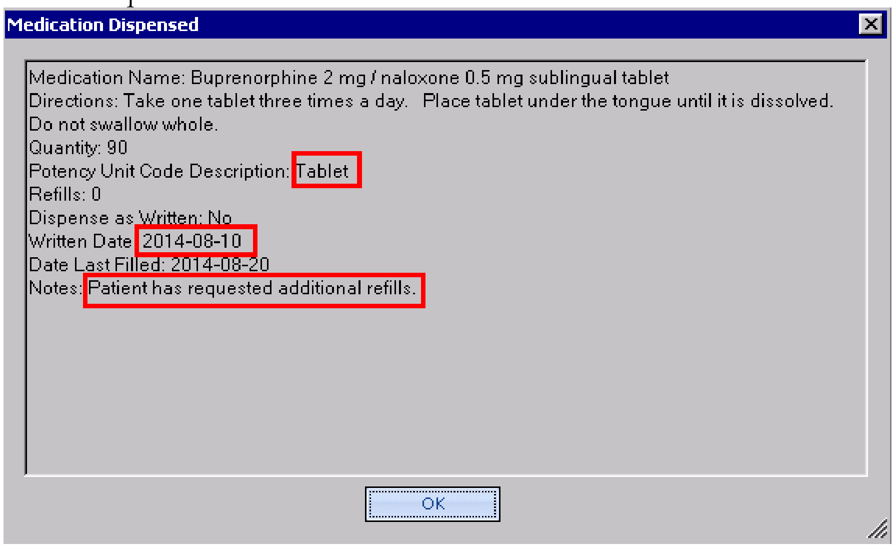
ExitCare Q1 2015 Updates Project #EHS-20957

The ExitCare updates for the first quarter of 2015 have been uploaded; including 211 new education titles added, 571 titles updated, 83 titles changed, and 15 titles deleted.

Medication, Information Added to Medication Dispensed Dialog for Surescripts Refill Requests

Project #EHS-21001

Surescripts refill requests on the **Medication Requests** screen now display the **Potency Unit Code**, **Written Date**, and any pharmacy **Notes** entered in the **Denial Reason** dialog box for denied requests.



Medication, Surescripts Refill Requests Now Match by NDC

Project #EHS-20869

Refill requests from Surescripts pharmacies will now be matched by NDC number instead of by the sig information.

- The system will search for an NDC in the patient's medication summary to match the refill request. If the NDC code on the request matched an NDC in the summary, the **Accept** icon will be enabled on the **Medication Requests** screen. If no NDC match exists, only the **Deny** icon will be enabled for the user to deny the refill. (**Deny** will also be enabled if the NDC numbers match for the user to deny the request, if needed.)
- The **Find Medications** icon on the **Medication Requests** screen will no longer be enabled for Surescripts refill requests; only the **Find Patient** icon will be enabled.
- The **SIG** column on the **Medication Requests** screen will automatically expand to display the full sig.
  - If the user accepts a refill request with matching NDCs, but different sigs, the medication summary will update and add the newer sig to the record. A non-billable encounter with a Chief Complaint of **Refill Request** will be created.

Reports, ICD9 Code Formats Added to Reports for ICD10 Databases

Project #EHS-20993

ICD9 code formatting has been added to the following reports in Clinical Console for databases that have migrated to ICD10, to eliminate confusion for clinic partners that have not migrated and are still on ICD9.

Both ICD9 and ICD10 code formats will now display on the following reports:

- **Active Problems**
- **All Problems**
- **Selected Patient Encounter Summaries**
- **Encounter Summaries For Selected Date Range**
- **Problem History**
- **Medical Encounter Superbill**
- **Dental Encounter**

Reports will display the ICD9 code and corresponding ICD10 codes in a **<000.00 / 000.000>** format.

ICD10 codes that have multiple codes associated to the ICD9 code will be separated by a comma, for example: **<250.00 / E11.9, E11.10>.**

Ryan White Reporting, CPCDMS Available for TX Clients

Project #EHS-18248

CPCDMS, a county-level reporting system required for certain customers in the state of Texas, is now supported on the **Ryan White Reporting** screen.

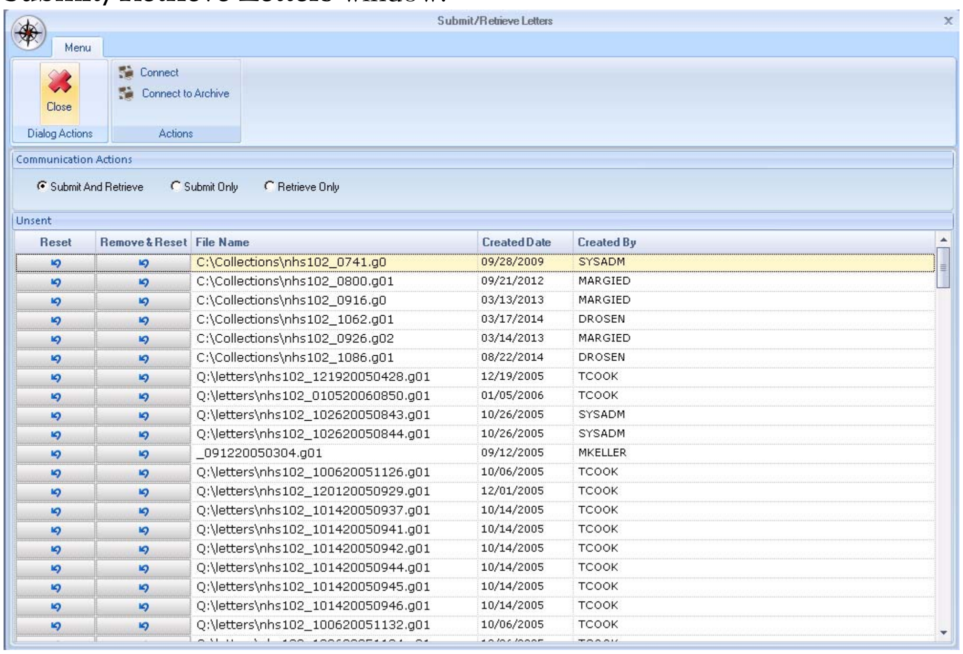
Collections

New RelayHealth EMF for Collection Letters Project #EHS-19328

The RelayHealth Electronic Mailbox Facility (EMF) is replacing the current Per Se FTP Server for electronic collection letters. In support of this, the following changes have been made to electronic collection letters.

- **Submit/Retrieve** – A new **Submit/Retrieve** menu option has been added to the **Letters** selection in the **Collections** menu that combines the send and retrieve functions into a single screen.

  Clicking **Submit/Retrieve** under **Letters** in the **Collections** menu displays the **Submit/Retrieve Letters** window.

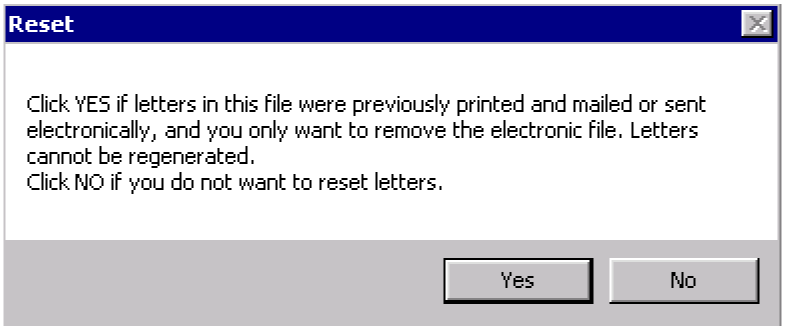


  Users may select the appropriate letter action under **Communication Actions,** select the appropriate letter file to send, and click **Connect** in the menu ribbon. Selections include:

  – **Submit and Retrieve** - Submit collection letters and retrieve any response files that have been waiting since your last retrieval.
  – **Submit Only** - Submit collection letters.
  – **Retrieve Only** - Retrieve collection letters that have been waiting since your last retrieval.

  Only one file at a time can be sent.

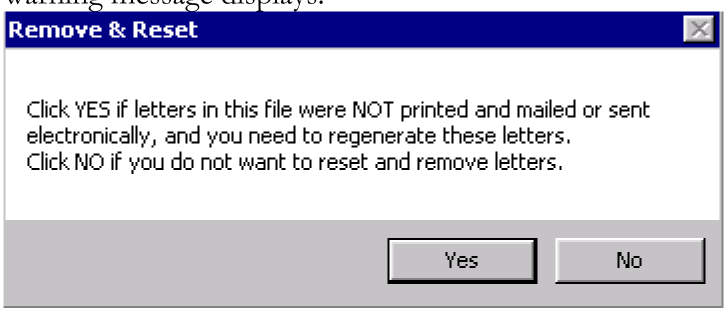
  – Click the **Reset** button for the appropriate collection letter file if a letter(s) in the file were previously sent out and you want to remove the letter file. A warning message displays.



Click **Yes** to remove the letter file.

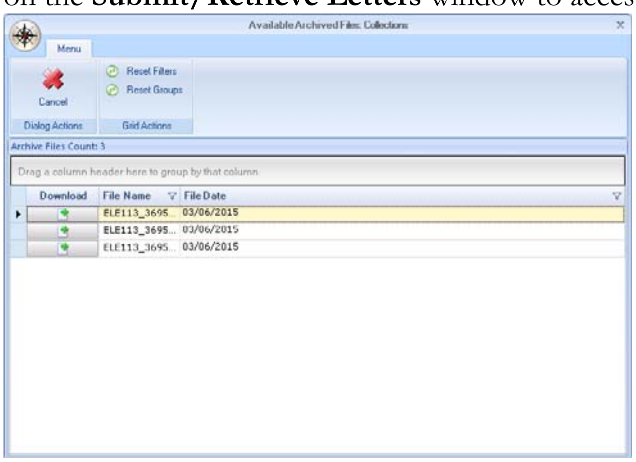
Note: Letters **cannot be regenerated** if **Yes** is clicked.

– Click the **Remove & Reset** button for the appropriate collection letter file if a letter(s) in the file were not previously sent out and need to be regenerated. A warning message displays.



Click **Yes** to remove and reset the letter file.

- **Connect to Archive** – Users may select click **Connect to Archive** in the menu ribbon on the **Submit/Retrieve Letters** window to access the archived collection letter files.



Users may click **Download** to download a specific letter file.

Dictation

New Success Speech Dictation Solution

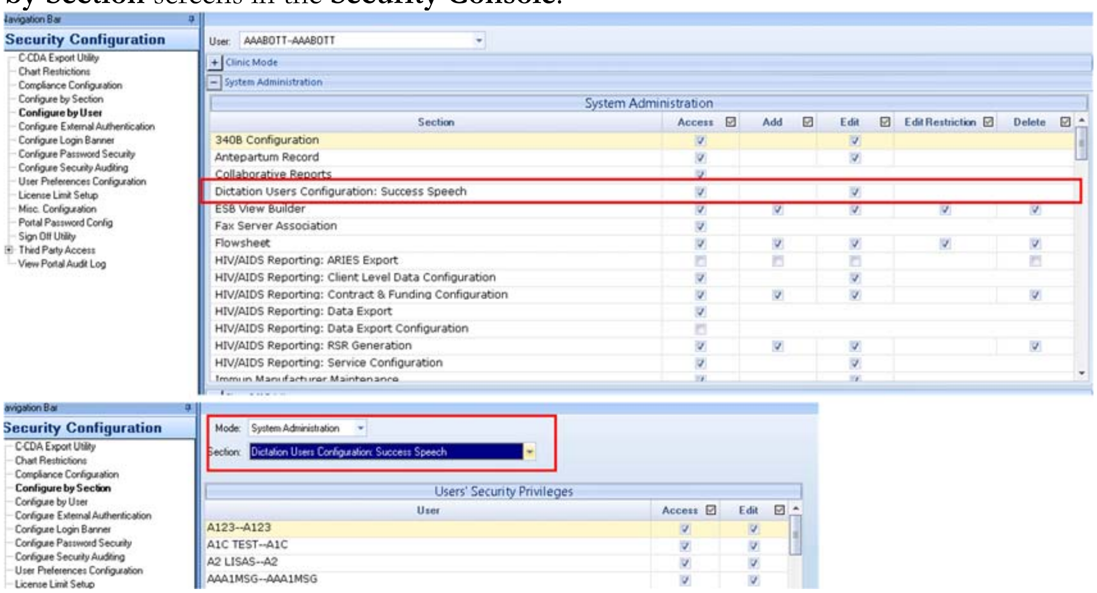
Project #EHS-19902, EHS-19748, EHS-20002, EHS-19725

A new dictation solution, **Success Speech**, which uses the M*Modal interface, is available with this software release. This solution will replace the Nuance SpeechMagic dictation platform for SuccessEHS dictation users. While we will continue to support customers using the SpeechMagic solution, our goal is to have all clients migrate to the new Success Speech offering.

The following updates have been made in the SuccessEHS POC system to accommodate this new dictation interface.

Configuring Security Access to Success Speech Dictation

Success Speech dictation access is enabled via the **Dictation Users Configuration: Success Speech** selection in the **System Administration** node of the **Configure by User/Configure by Section** screens in the **Security Console**.

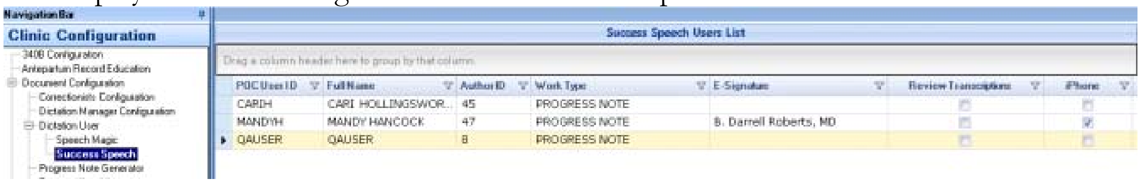


The following security options are available:

- **Access –** Users may access and view the Success Speech screen in the **Dictation Users Configuration** node in the **Clinic Configuration** task list in the **System Administration Console**.
- **Edit –** Users may edit the appropriate settings for a dictation user's configuration in the above screen.

Configuring Success Speech Dictation Users

A **Success Speech Users List** screen has been added under **Dictation User** in the **Document Configuration** in the **Clinic Configuration** task list in the **System Administration Console** that displays all users configured to use the Success Speech dictation solution.



The following information is available for viewing:

- **POC User ID** – Displays the user ID associated to the provider.
- **Full Name** – Displays the full user name linked to the user ID.
- **Author ID** – Displays the Provider ID given to the user/provider
- **Work Type** – Displays all work types for which the user/provider has been configured. This should default to Progress Note for all users.
- **Review Transcriptions** – Select (check) this checkbox to enable providers to review Success Speech dictations before they are sent to a patient's chart. Success Speech dictations will display on the main **Transcriptions for Review** screen in Clinical Console (the same as SpeechMagic dictations).
- **iPhone** – Select (check) this checkbox to enable providers to use the SuccessEHS Mobile EHR app for dictation as well as the POC desktop solution.
- **Use e-Sign** – Select (check) this checkbox to enable providers to append an e-signature as defined in the **E-Signature** field (see below) to the note once the dictation is processed by Success Speech and is sent back to the patient's chart.
- **E-Signature** – Enter the provider's e-signature that will be appended to dictations (character limit 400; alphanumeric and special characters allowed).

  Note: This option is only available if the **Use e-Sign** option is selected.

- **Include Date/Time Stamp** – Select (check) this checkbox to add the date and (time zone-aware) time the dictation was finalized to the note along with the e-signature; for example:

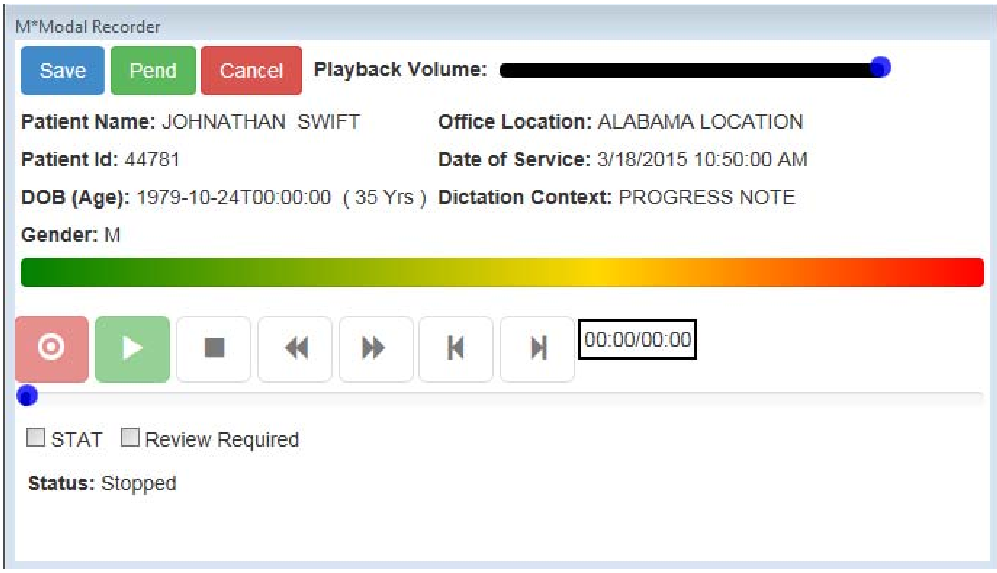
  Electronically Signed by: Mandy Hancock R.N., BSN 01/30/2015 11:22 AM

  Note: This option is only available if the **Use e-Sign** option is selected.

  Note: The date/time reflects when the dictation was finalized, not created or originally recorded.

Dictating with the Success Speech Solution

The dictation recorder is installed on the dictation user's machine. The recorder itself runs independent of the SuccessEHS POC software, so that users may access different screens or switch focus to other information on screen without closing the recorder software or otherwise interrupting the dictation process.

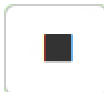
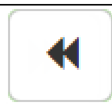
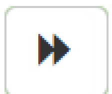
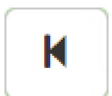
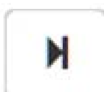


The Success Speech dictation recorder may be accessed from the standard dictation points in the SuccessEHS software:

- **Documentation** and **ESB** ribbons in Clinical Console
- All **Encounter Details** screens
- **Encounters** tab in classic **Chart**
- All **Clinical Notes** screens
- All **PNG** templates
- **Medcin**

The following information and functions are available on the Success Speech dictation recorder:

Information / Icon	Functionality
Demographics section	Displays the following information: • **Patient** – as recorded in Patient Administration • **Patient ID** – as recorded in Patient Administration • **Date of Birth (Age)** – as recorded in Patient Administration • **Gender** – as recorded in Patient Administration • **Office Location** – office location associated to the encounter that was in context when the recorder was launched • **Date of Service** – encounter date • **Dictation Context** – **Progress Note** or **Medcin** based on what screen the users is in when the recorder is launched

Information / Icon	Functionality
	Begin recording.
	Play recording.
	Stop recording.
	Rewind the recording.
	Fast forward the recording.
	Rewind to the beginning.
	Fast forward to the end.
	Adjust the playback volume of the recording.
☐ STAT	Select (check) the **STAT** checkbox to indicate that the dictation is to be reviewed and completed immediately.
☑ Review Required	Select (check) the **Review Required** checkbox to indicate that the dictation needs to be reviewed before being submitted. This will default based on the providers setup in system administration; however, it can be used to override the preference when necessary.
Save	Save the dictation recording.
Pend	Pend the dictation recording for later completion.
Cancel	Cancel the dictation recording.

Transcribing/Correcting Dictation Jobs

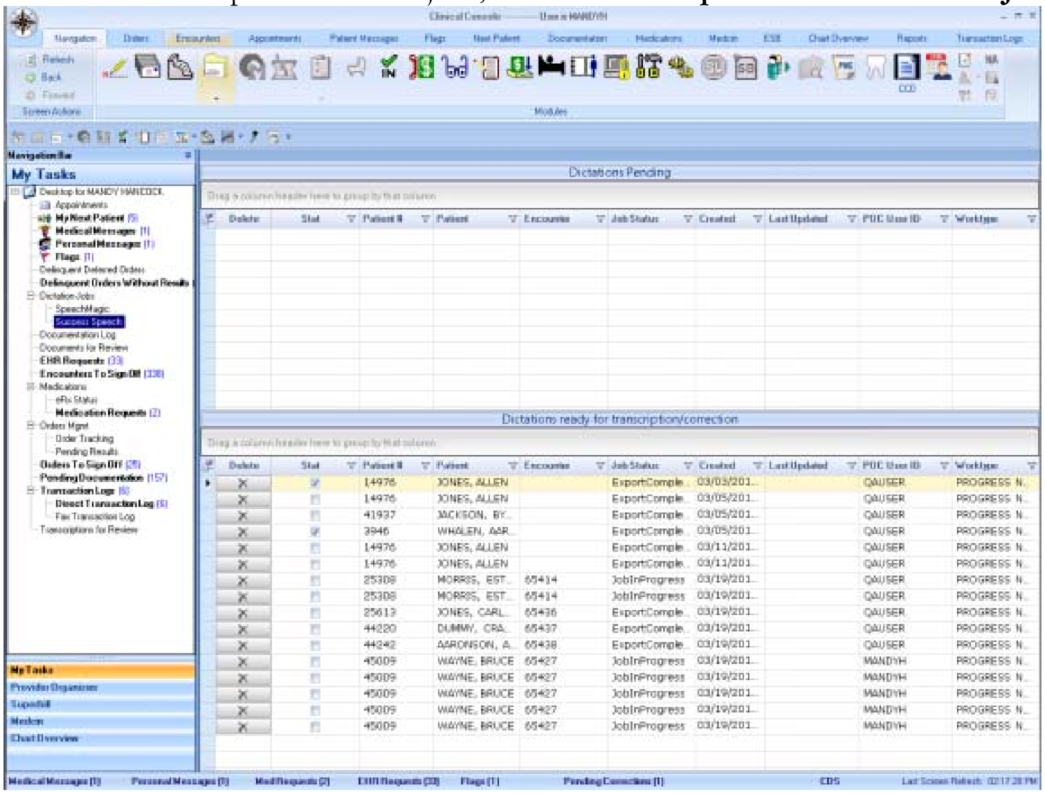
Transcriptionists/correctionists will use the M*Modal Fluency for Transcription (FFT) product to transcribe and/or correct the dictation job. Once the job is saved within SuccessEHS, the job will be routed to M*Modal. The transcription team will correct the job and then save the job, which then routes the job back to the SuccessEHS product.

The benefit of using the M*Modal FFT product for transcribing/correcting the job includes its more robust transcription features as well as advanced reporting capabilities.

Viewing Success Speech Dictation Jobs

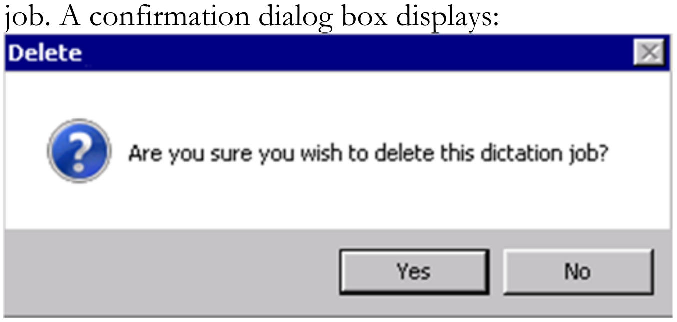
The **Dictation Jobs** screen in Clinical Console has been divided into two sections, **Success Speech** and **SpeechMagic**, for users to view dictation jobs created in each dictation solution.

To view Success Speech dictation jobs, select **Success Speech** in the **Dictation Jobs** node.



The Success Speech dictation jobs screen contains two sections: **Dictations pending** and **Dictations ready for transcription/correction**. The following information is available for viewing in each section:

- **Delete** – Click  in the **Delete** column of the appropriate row to delete the dictation job. A confirmation dialog box displays:

  Click **Yes** to delete the job, or **No** to cancel deletion.

  Note: Deleting a job means to remove the **entire** job. This action **cannot be undone**. Please use this cautiously.

- **Stat** – Displays a checkmark if the job is marked STAT.
- **Patient #** – Displays the patient ID associated with the job.

- **Patient** – Displays the patient name (last name, first name middle initial) associated with the job.
- **Job Status** – Displays the status of the job.
- **Created** – Displays the date/time the dictation was created.
- **Last Updated** – Displays the date/time the job was last modified.
- **POC User ID** – Displays the POC User ID of the person that created the job.
- **Worktype** – Displays the worktype associated with the job.

The table view may be modified as follows:

If this…	Do this…
You want to group the screen by column header.	Select a column header and dragging it to the **"Drag a column header here to group by that column"** region immediately above the columns.
You want to filter columns.	Click in the column header and choose the filtering value from the drop-down list.
You want to reset the columns to their original filter or grouping.	Click **Reset Filters** or **Reset Groups** in the menu ribbon.
You want to rearrange columns in the table.	Click on the appropriate column header and drag it to the desired position on screen.
You want to widen or shorten columns in the table.	Drag the column headers to the desired width.
You want to reset the table column to their original layout.	Click **Default Layout** in the menu ribbon.

Note: Once a job has imported back into the software from Success Speech, it will no longer display as a row on the **Dictation Jobs** screen. This screen only shows jobs pended or waiting for transcription; once the job is processed, it will no longer need to show here.

Processing Success Speech Dictations

Success Speech dictations will feed to the SuccessEHS POC in the same manner as dictations created with SpeechMagic.

- **Transcriptions for Review –** Providers configured to review transcriptions will access Success Speech dictations on the **Transcriptions for Review** screen in Clinical Console in the usual manner. Providers must mark the Success Speech dictation as final before it is sent to the patient's chart.
- **Encounter Details –** Finalized Success Speech dictations will display on the **Progress Notes** tab in the **Encounter Detail** window in Clinical Console as normal.

  Note: Dictations will no longer appear in the **General Notes** tab of Encounter Details. The finalized dictation will only appear in the **Progress Note** tab as a formatted note.

- **Progress Notes –** Finalized Success Speech dictations will display in the **Dictations** folder in the **Progress Notes** section of **Patient Documents** in **Chart Overview** as normal.

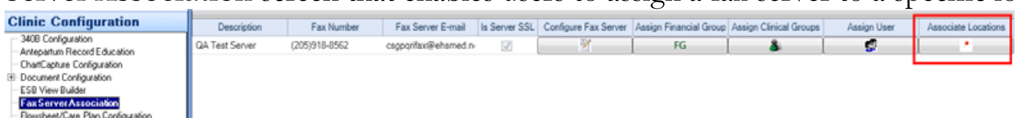
Note: The audio files will be attached to the encounter and appear in **Patient Documents** the day after the dictation has been sent back to SuccessEHS.
For example: If a dictation is recorded on 3/15/15, transcribed/corrected on 3/16/15, and sent back to the SuccessEHS POC on 3/16/15, the audio file will be available on 3/17/15. A nightly job runs to collect all audio files for incoming dictations and will sync the files to the appropriate dictation jobs. At that time, the audio playback would be available for users.

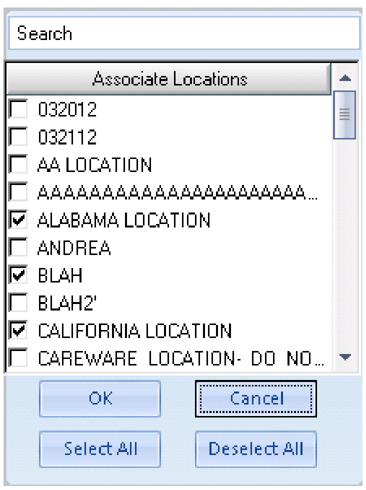
Faxing

New Associate Locations Option for Fax Cover Sheets

Project #EHS-11768

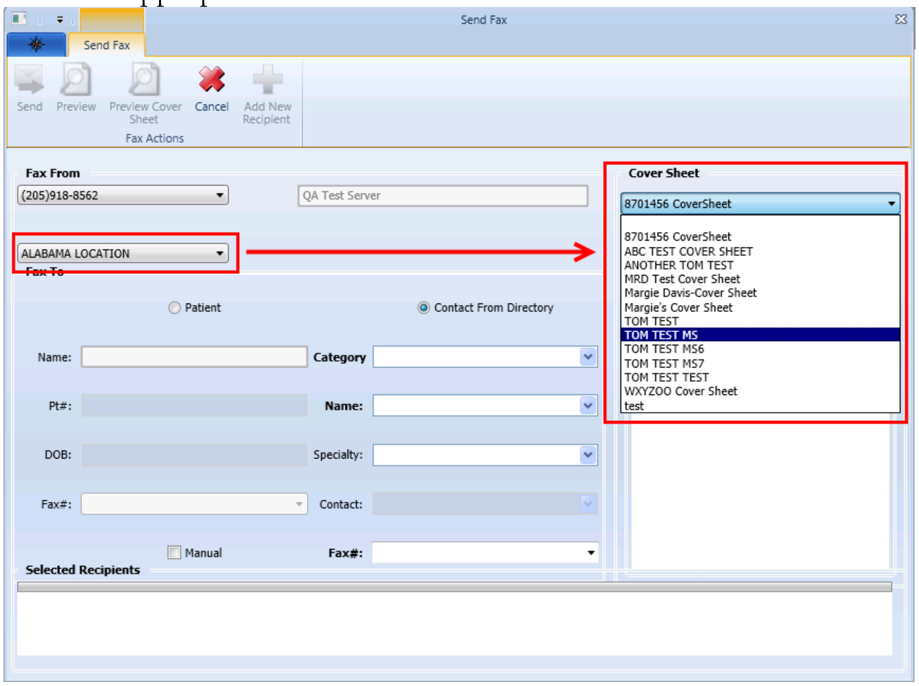
Users may associate specific fax cover sheets created on the **Cover Sheets** screen in **Forms Administration** to specific locations.

1. **Merge Field** – A **FaxFromLocation** merge field has been added to **Forms Administration** that, when included on a fax cover sheet, will enable the cover sheet to link to a specific fax number location.
2. **Associate Locations** – An **Associate Locations** column has been added to the **Fax Server Association** screen that enables users to assign a fax server to a specific location.


Clicking  for the appropriate fax server record displays an **Associate Locations** dialog box. Users may select (check) the appropriate location(s) to assign to the fax server.


3. **Sending a Fax** – When the user accesses the **Send Fax** window, he will select a location from the drop-down list beneath the **Fax From** drop-down list. All cover sheets associated to that location will display in the **Cover Sheets** drop-down list; the user may

select the appropriate associated cover sheet to include on the fax.



Interfaces

Database Packages Updated to Support ICD10 Project #EHS-20832

The interoperability database packages have been updated to support ICD10. Additional database packages tested and confirmed include:

- ADPH
- AEL
- CPL
- LABDAQ
- Quest Bi-Directional SKB
- RML

With these updates, users can go live on ICD10 and select ICD10 codes; the templates for each interface will send ICD9 codes until the templates are updated.

All templates will be switched over to ICD10 on the industry date of **October 1, 2015** (unless the date changes).

> **Note:** Testing means Greenway Health has validated when ICD10 codes are used the interface will pass the correct codes to the vendor. Vendor testing must also be done to validate the vendors accept the codes. When vendors begin testing is not something Greenway Health can control, but Greenway Health will make every effort to test with each vendor when they are available.

Updates to Midmark Device Configuration Settings Project #EHS-20198

The configuration settings for Midmark devices have been updated to provide SYSADM users with access to a file in which to save custom configuration settings.

The **SetConfigFromFile()** command enables SYSADM users to save the **CommonConfiguration.cfg** and **ECGConfig.cfg** configuration files to a customized file location, instead of reading the files from the startup or current directory.

If users do not save the configuration files at the customized location, the default values for all configuration settings will be in effect. If the operator changes a setting, the control will write the new configuration settings to these files, provided that the path is valid.

Meaningful Use / PQRS / CQM

Reporting Preferences, 2015 Reporting Options Added

Project #EHS-20683

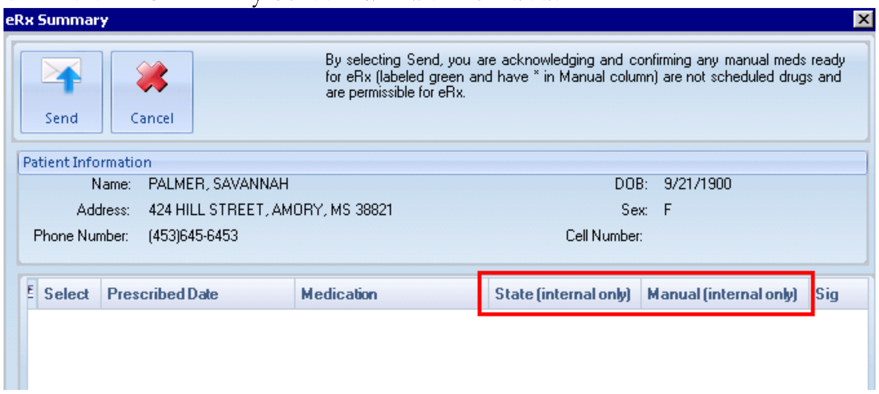
The 2015 options has been added for PQRS and CQM reporting on the **Reporting Preferences** screen. The new options are as follows:

- **Start Date / End Date** – The **Start Date** and **End Date** columns will now include the 2015 date range.
- **Reporting Period** – The following options have been added to the **Reporting Period** drop-down list:
  - **2015 - (01/01/2015 - 12/31/2015)**
  - **2015 - 1st Quarter (Jan 1, 2015 - March 31, 2015)**
  - **2015 - 2nd Quarter (April 1, 2015 - June 30, 2015)**
  - **2015 - 3rd Quarter (July 1, 2015 - September 30, 2015)**
  - **2015 - 4th Quarter (October 1, 2015 - December 31, 2015)**

Medications.NET

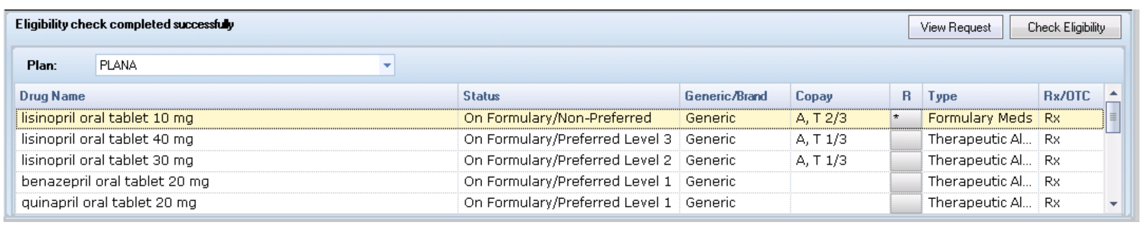
eRx Summary, Internal Use-Only Columns Indicated Project #EHS-21002

The **State** and **Manual** columns on the **eRx Summary** window have been renamed **State (Internal Only** and **Manual (Internal Only)** to indicate that the information in those columns will not be included in Surescripts transmissions. All other information in the remaining columns on the eRx Summary screen will be included.



Formulary Changes Project #EHS-20886

The **Formulary** functionality has been updated in **Medications.NET** as follows:



Check Eligibility

- The **Check Eligibility** button will be disabled if it is less than 24 hours from the previous eligibility check for a medication.
- If an error occurs during an eligibility check, an **Error** message will display as follows: **"The following error(s) occurred: [Error(s) received]"**. Users may click **OK** on the **Error** message to acknowledge the error.

View Request

- The **View Request** button will display in red if any differences in demographic data are found between the 270 request and 271 response (e.g., name/address/phone/DOB). The following tool tip will display:
  "This request needs to be reviewed. The demographic information received in the 271 for the selected patient is different than what is currently stored in the medical record."

Formulary Grid Changes

The following fields/columns have been renamed as follows:

- **Formulary** drop-down list – renamed **Plan**. Displays the plans returned for the patient. Users will select the appropriate plan to display the formulary list for that plan. If no plan exists, the list will display **Unknown**.
- **Name** column – renamed **Drug Name**
- **Formulary Status** column – renamed **Status**
- **OTC** column – renamed **Rx/OTC**. Displays either **Rx** or **OTC** depending on the medication.

The following columns have been added to the Formulary grid:

- **Generic/Brand** – Displays **Generic** or **Brand** depending on the medication.
- **Type** – Displays the type of medication: **Formulary Med** (target medication), **Payer Alternative**, or **Therapeutic Alternative**.

Inactive Meds Hx, Changes Regarding Refill Requests

Project #EHS-20726

The following changes have been made to refill requests in **Medications.NET**:

- **Inactive Meds Hx** – For refill requests, the following information will populate in the following columns on the **Inactive Meds Hx** tab on the **Medication Summary** tab:

Column	Information
Request Reason	• **Phone Call requests** – Displays the text from the **Phone Call Reason** column in **Medication Requests.** • **Portal refill** – Displays the text from the **Comments** field entered by the portal user on the **Request Refill** screen.
Denial Reason	Displays the denial reason selected from the **Request Denied** dialog box.
Pharmacy Notes Sent	Displays any free text entered in the **Pharmacy Notes** field on the **Request Accepted** or **Request Denied** dialog box (depending on whether the refill was accepted or denied).
Pharmacy Notes Received	• **Surescripts requests** – Displays the pharmacy notes entered in on the individual refill request for the **Pharmacy Notes** column in **Medication Requests**. • **Phone Call / Portal requests** – No notes are present in the **Pharmacy Notes** column for either of these options.

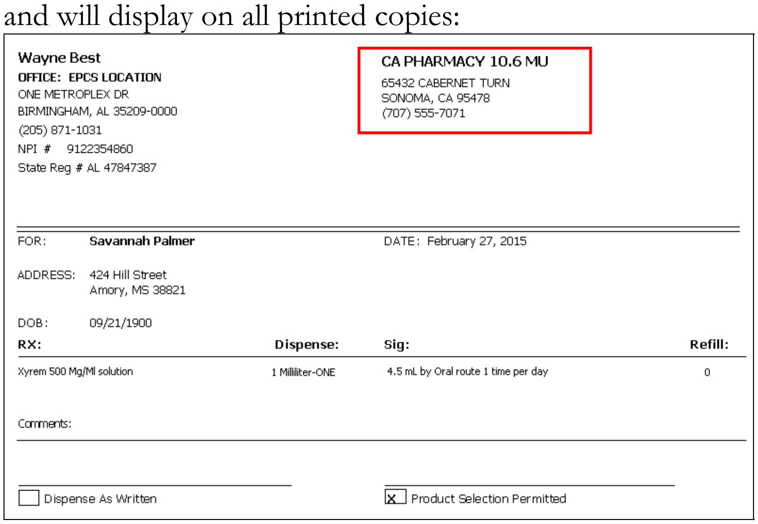
Column	Information
Response	**Accept** or **Denied** (depending on whether the refill was accepted or denied).

- **Accepting refill requests**
  - The chief compliant for all non-billable encounters generated from accepted refill requests will now read **Refill Request-Accepted**.
- **Denied refill requests**
  - For Surescripts requests, the chief compliant for all non-billable encounters generated from denied refill requests will now read **Refill Request-Denied**.
  - For Phone Call / Portal requests, the denied request will remain on the **Medication Requests** screen; users must select (check) the **Complete** checkbox for the denied request and click **Remove Completed** in the menu ribbon for the request to be removed from the **Medication Requests** screen. After this, a non-billable encounter will be created in the patient's chart with a chief complaint of **Refill Request-Denied**.

Pharmacy Contact Information Required for Printed Prescriptions

Project #EHS-21071

The pharmacy address and phone number is now a required element for all printed prescriptions and will display on all printed copies:


Wayne Best
OFFICE: EPCS LOCATION
ONE METROPLEX DR
BIRMINGHAM, AL 35209-0000
(205) 871-1031
NPI # 9122354860
State Reg # AL 47847387

CA PHARMACY 10.6 MU
65432 CABERNET TURN
SONOMA, CA 95478
(707) 555-7071

FOR: Savannah Palmer DATE: February 27, 2015
ADDRESS: 424 Hill Street
Amory, MS 38821
DOB: 09/21/1900

RX:	Dispense:	Sig:	Refill:
Xyrem 500 Mg/Ml solution	1 Milliliter-ONE	4.5 mL by Oral route 1 time per day	0

Comments:

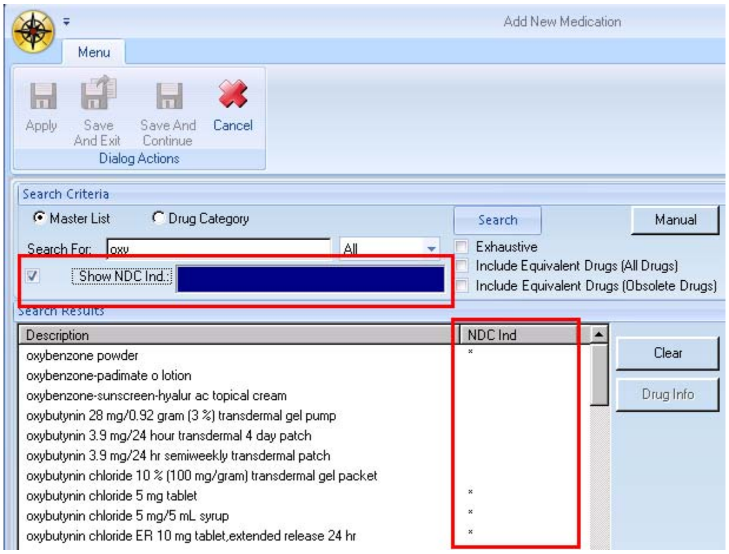
Dispense As Written
Product Selection Permitted

NDC Additions for Adding Medications

Project #BHML3-880, BHML3-878

The following additions have been made to **Medications.NET** for NDC identification:

- **NDC Indicator –** An **NDC Indicator** column has been added to the search results field on the **Add New Medication** dialog box in the **Prescribed Medications** starter set under **Clinic Configuration** in the **System Administration Console**.



When performing a search, users may select (check) the **Show NDC Ind** checkbox to indicate which medications in the list of search results have an NDC number.

NDC medications are indicated by an asterisk (*****) in the **NDC Ind** column. The blue progress bar to the right of the checkbox will track the loading of the NDC information.

- **NDC prompt in Current Meds –** If a user is adding medications via the **Current Meds** button in the **Medications** module, the NDC prompt should be ignored regardless of whether or not the prompt is enabled in **Medication Preferences**.

Medcin.NET

Medcin Q4 Updates

Project #EHS-2879

The Q4 2014 Medcin updates have been completed.

Highlights include 3,318 new MEDCIN concepts added to the knowledge base: 678 diagnoses, 18 history, 143 physical exam, 16 symptoms, 2191 tests, and 272 Therapy.

Updated Specialty Codes for MEDCIN concepts were also added.

Mobile EHR

New Jump Desktop App for iPad RDP Support Project #EHS-20647

A new RDP client app, **Jump Desktop**, is available that replaces the Wyse Pocket Cloud Pro app, which is no longer available for iPad support.

Users may download the Jump Desktop app from the Apple App Store and install is per the normal procedure.

SuccessEHS Mobile EHR Updates Project #EHS-20936

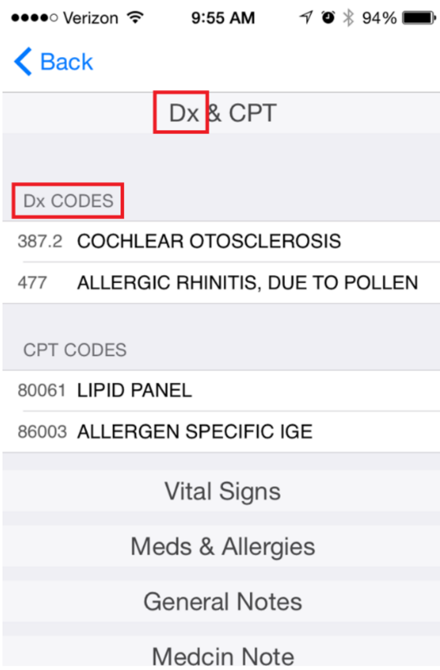
The following updates have been made to the SuccessEHS Mobile EHR app:

1. The main information for the app (copyright and website) has been updated to reflect the Greenway Health corporate information:

   The SuccessEHS Mobile EHR Support hyperlink has been removed.

2. All **ICD9** labels in the **Clinical Review** screen have been updated to **Dx** (diagnosis) labels to accommodate both ICD9 and ICD10 codes:

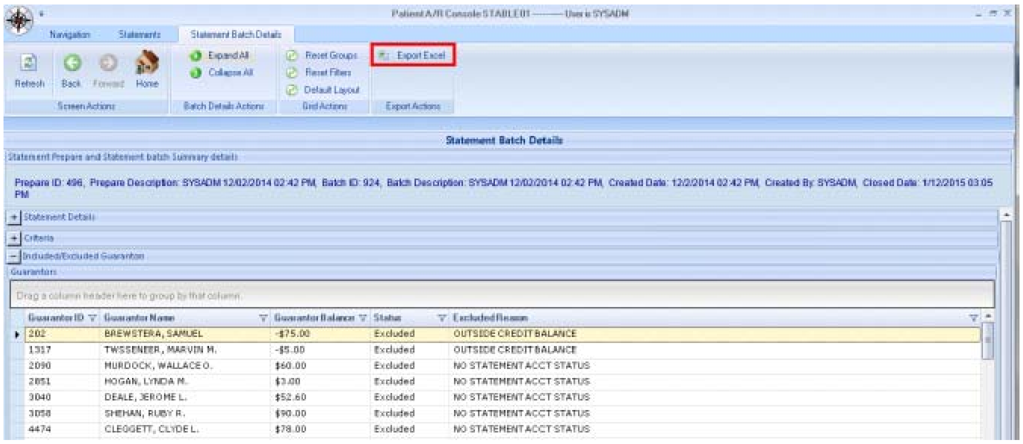

Verizon
9:55 AM
94%
Back
Dx & CPT
Dx CODES
387.2 COCHLEAR OTOSCLEROSIS
477 ALLERGIC RHINITIS, DUE TO POLLEN
CPT CODES
80061 LIPID PANEL
86003 ALLERGEN SPECIFIC IGE
Vital Signs
Meds & Allergies
General Notes
Medcin Note

Patient A/R

Batch Summary, New Export Function for Batch Details

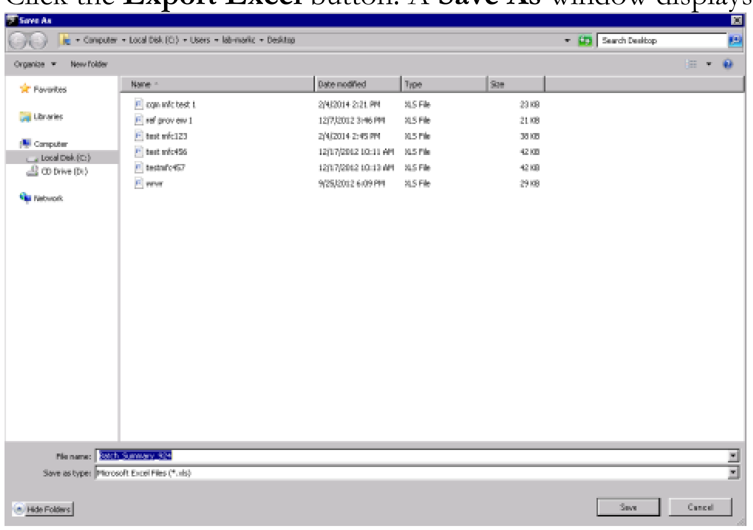
Project #EHS-20269

Users may export details from the main grid on the **Statement Batch Details** screen in **Patient A/R** to a Microsoft Excel file via a new **Export Excel** button on the **Statement Batch Details** screen.



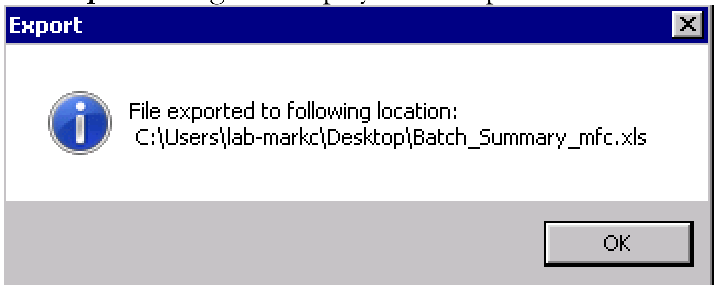
To export statement batch details:

1. Click the **Export Excel** button. A **Save As** window displays.



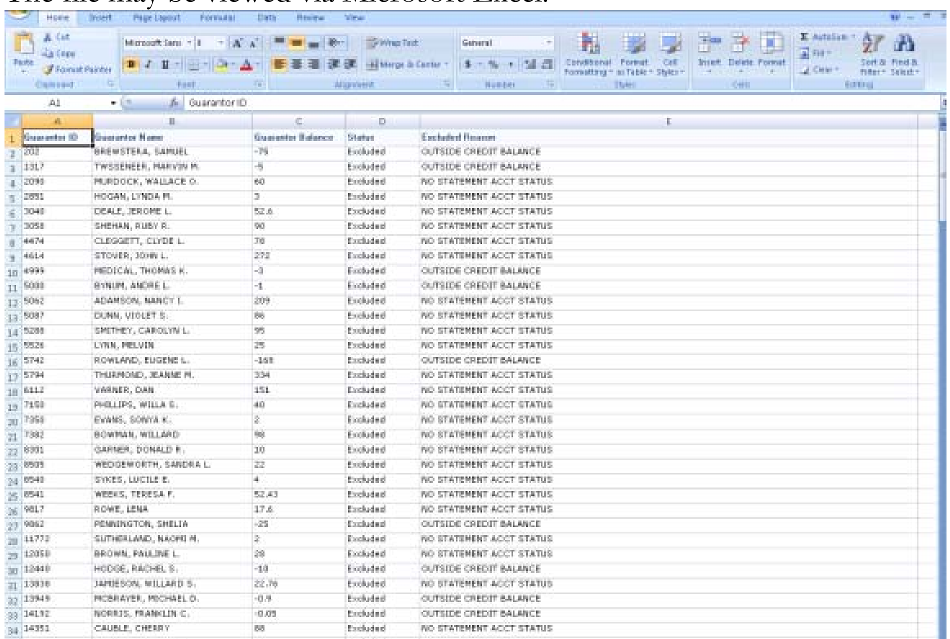
2. Browse to the appropriate external folder to save the exported data.
3. Enter an appropriate **File name** for the data and click **Save**.

4. An **Export** dialog box displays the file path to where the data was exported.



Click **OK** to close the dialog box.

5. The file may be viewed via Microsoft Excel.

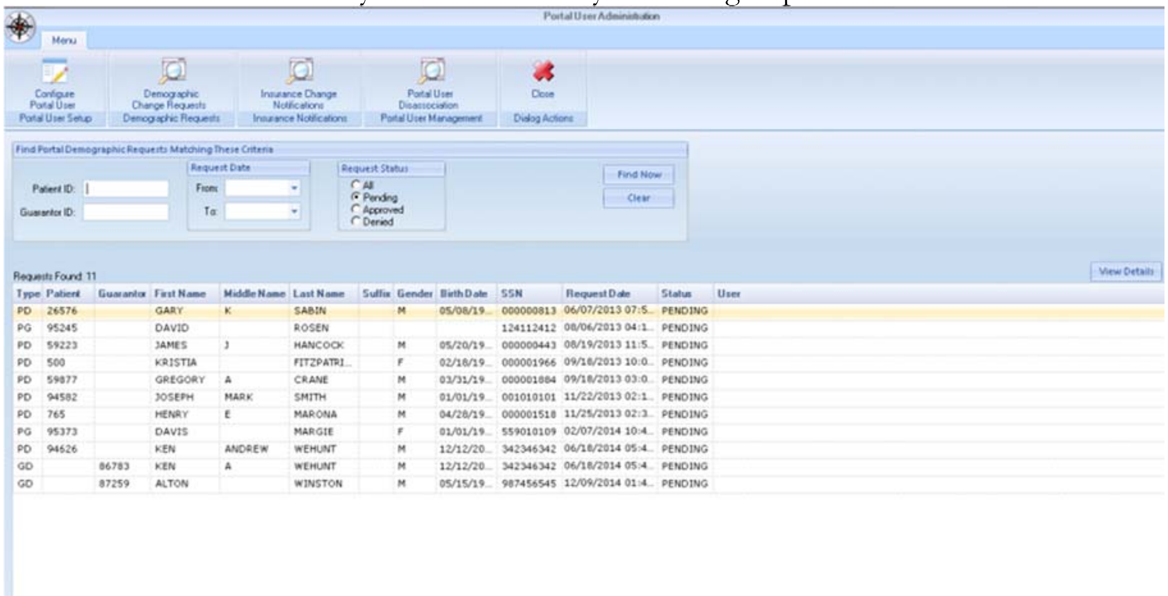


Patient Portal

New Patient Sharing Option for Portal Demographic Requests

Project #EHS-10119

Patient Portal demographic requests made on the **Portal User Administration** window in **Patient Administration** may now be filtered by financial groups.



If a database has financial group filtering enabled, then only patients in the specific active financial group will display in the search results in the **Portal User Administration** window. Databases where filtering is not enabled will display search results from across all available financial groups.

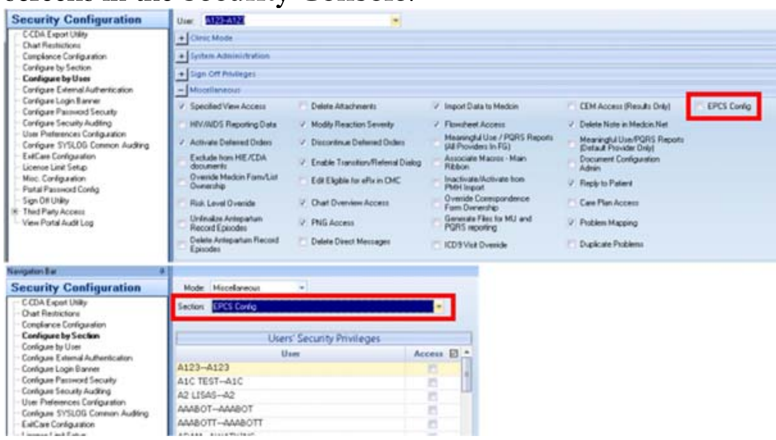
SuccessEHS Electronic Prescription of Controlled Substances

Electronic prescription of controlled substances (EPCS) is available for Schedule II-V drugs in this release of the SuccessEHS software. With the EPCS functionality, providers may send certain controlled substance prescriptions to qualifying pharmacies via eRx.

Configuring Providers for EPCS

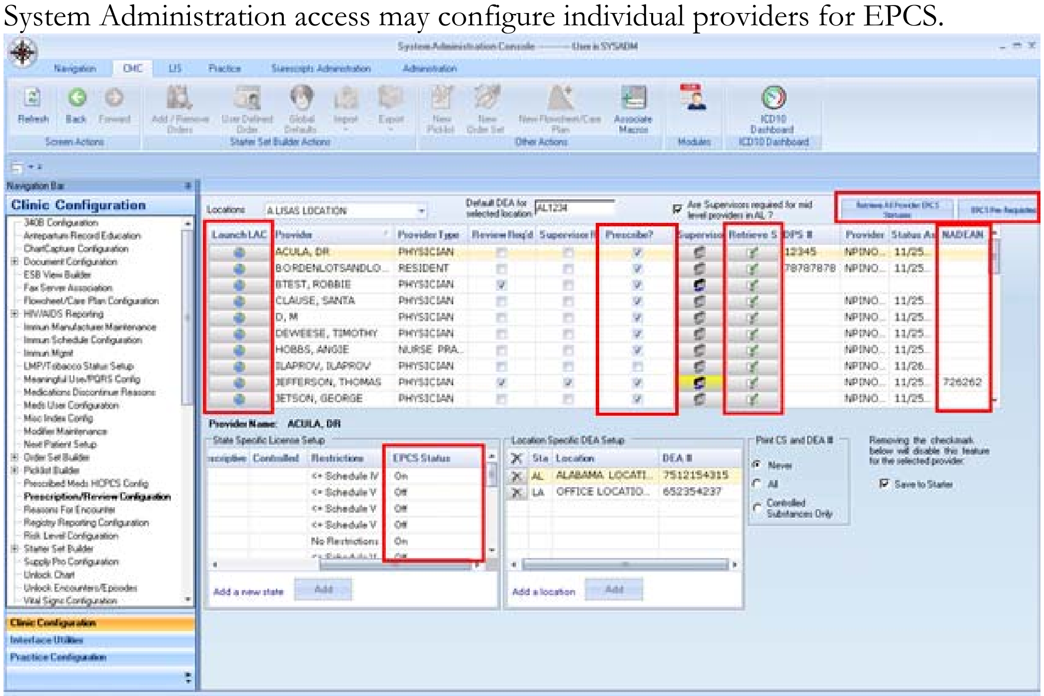
The following enhancements have been made to configure providers for EPCS.

Note: Access to the following functionalities is defined by enabling the **EPCS Config** option for the user in the **Miscellaneous** mode of the **Configure by User/ Configure by Section** screens in the **Security Console**.

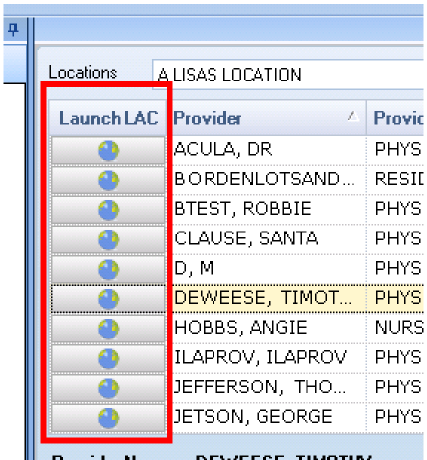


System Administration Console: Prescription/Review Configuration

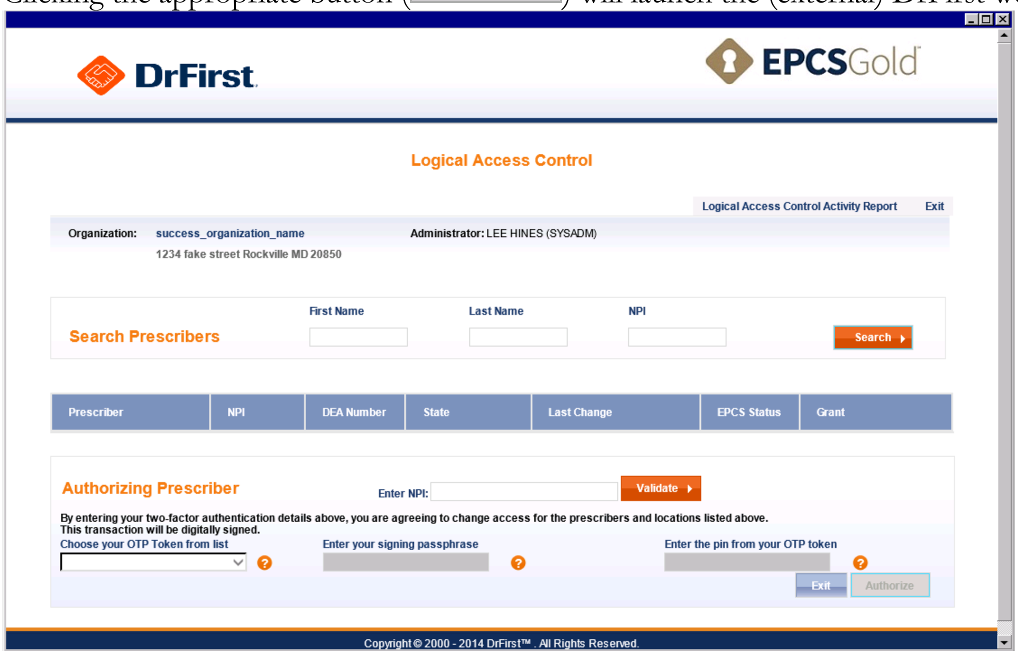
Once EPCS is activated on the database and enabled in the **Security Console**, users with System Administration access may configure individual providers for EPCS.



- **Launch LAC** – The **Launch LAC** button enables the user to access the DrFirst website.



Clicking the appropriate button () will launch the (external) DrFirst website.



From the DrFirst website, users can enable the appropriate provider and complete registration for EPCS.

– Providers may request a hard token (e.g., a key fob) that generates the ID number; this token will be mailed to them within 2–4 business days after setup is complete.

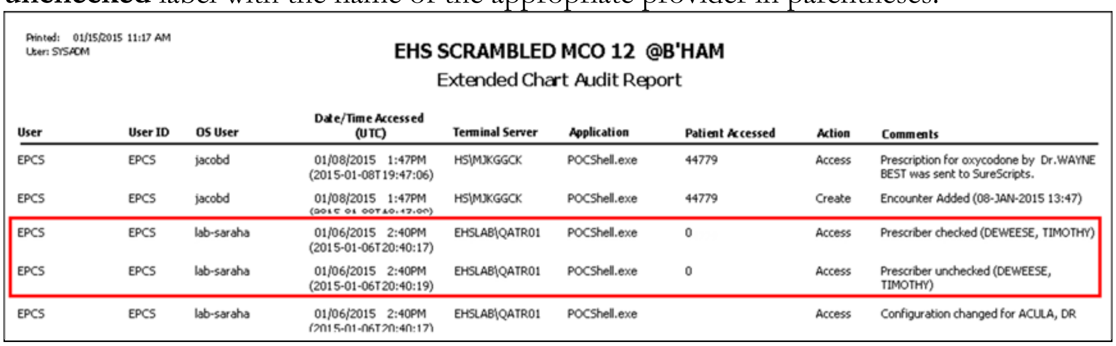
– If a hard token is not requested, providers will use a "soft token" (for smartphones) that is downloaded from the Symantec **VIP Access** app in the appropriate smartphone app store.

– Providers may have up to five (5) tokens.

Once the setup on the DrFirst website is complete, the **Launch LAC** button will be highlighted in yellow for the appropriate provider.

Note: The **Launch LAC** button is an auditable event and will display on the **Chart Extended Audit Report** in classic **Security** with **Comments** of **"Logical Access Control accessed for [Provider Name]".**

- **Prescribe? Column Auditing** – The status of the **Prescribe?** column (checked or unchecked) is now an auditable event and will be tracked in the **Chart Extended Audit Report** in classic **Security**.
  This event will display in the **Comments** section as a **Prescriber checked** or **Prescriber unchecked** label with the name of the appropriate provider in parentheses.

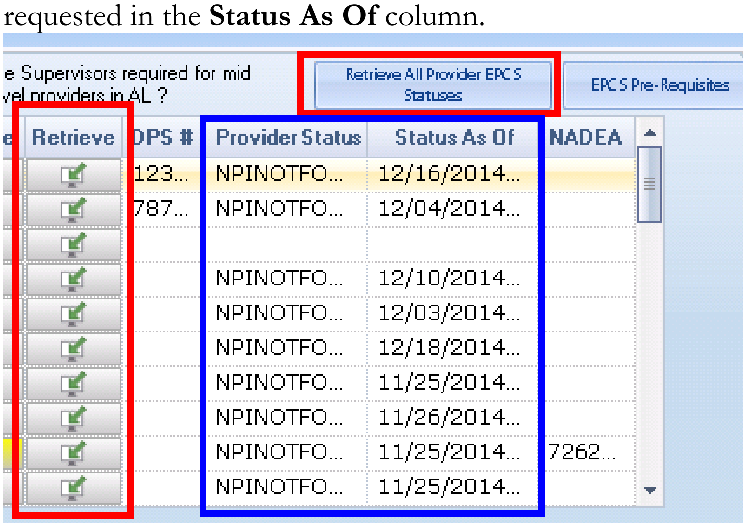


Printed: 01/15/2015 11:17 AM
User: SYSADM

EHS SCRAMBLED MCO 12 @B'HAM
Extended Chart Audit Report

User	User ID	OS User	Date/Time Accessed (UTC)	Terminal Server	Application	Patient Accessed	Action	Comments
EPCS	EPCS	jacobd	01/08/2015 1:47PM (2015-01-08T19:47:06)	HS\MJKGGCK	POCShell.exe	44779	Access	Prescription for oxycodone by Dr.WAYNE BEST was sent to SureScripts.
EPCS	EPCS	jacobd	01/08/2015 1:47PM	HS\MJKGGCK	POCShell.exe	44779	Create	Encounter Added (08-JAN-2015 13:47)
EPCS	EPCS	lab-saraha	01/06/2015 2:40PM (2015-01-06T20:40:17)	EHSLAB\QATR01	POCShell.exe	0	Access	Prescriber checked (DEWEESE, TIMOTHY)
EPCS	EPCS	lab-saraha	01/06/2015 2:40PM (2015-01-06T20:40:19)	EHSLAB\QATR01	POCShell.exe	0	Access	Prescriber unchecked (DEWEESE, TIMOTHY)
EPCS	EPCS	lab-saraha	01/06/2015 2:40PM (2015-01-06T20:40:17)	EHSLAB\QATR01	POCShell.exe		Access	Configuration changed for ACULA, DR

- **Retrieve Status** – The **Retrieve Status** column enables users to view the EPCS status of a specific provider. Clicking the  button in the column for the appropriate provider will display the EPCS status in the **Provider Status** column and the date the status was requested in the **Status As Of** column.

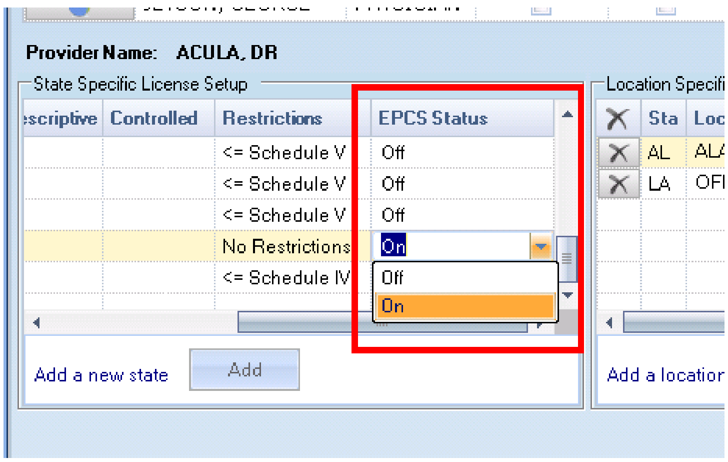


The following are possible EPCS statuses for providers:

- **NOTENROLLED** – The prescriber is not enrolled in EPCS.
- **INVITED** – The prescriber has been invited to EPCS.
- **INVITEFAILED** – The prescriber could not be invited because of an error.
- **INVITEPENDING** – Temporary state between NOTENROLLED and INVITED.
- **IDPFAILED** – The prescriber failed the identity proofing step in the registration process.
- **TOKENBOUND** – The prescriber has completed identity proofing and is waiting to receive their token.
- **ENROLLED** – The prescriber has entered their IDP confirmation number and is enrolled in EPCS.
- **NPINOTFOUND** – The prescriber does not exist in the EPCS system.
- **DISABLED** – The prescriber has been disabled from sending EPCS prescriptions.

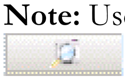
Users may also click the **Retrieve All Provider EPCS Statuses** button to display the status for all providers in the grid.

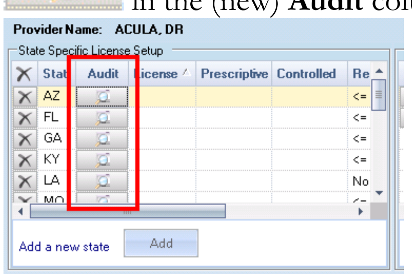
- **EPCS Status** – The **EPCS Status** column in the **State Specific License Setup** grid allows users to enable EPCS for the provider at the state level, subject to the specific configuration in the **Restrictions** column for each state.



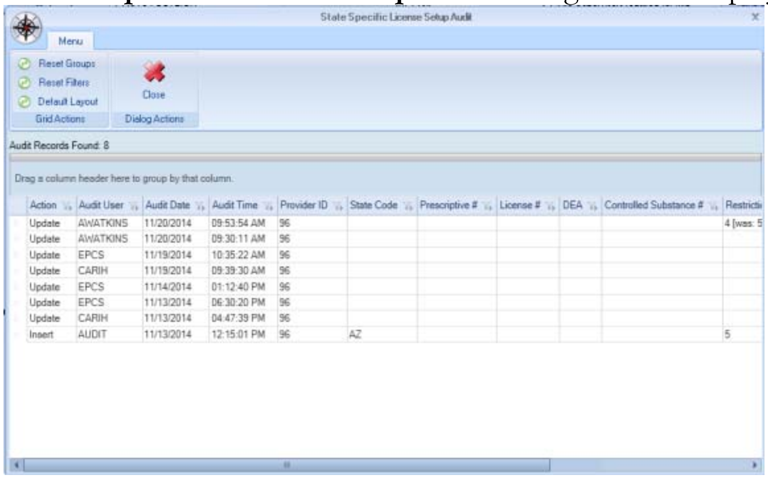
EPCS status restrictions are as follows:

- **No Restrictions:** EPCS status = **Off**
- **Schedule II – IV:** EPCS Status = **On**
- **Schedule V:** EPCS Status = **Off**

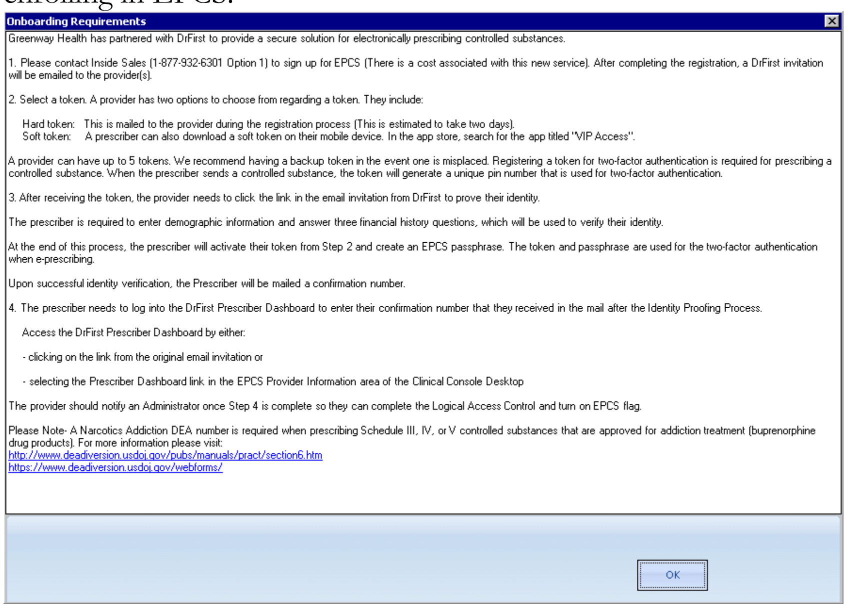
Note: Users may run an audit report for the **State Specific License Table** by clicking  in the (new) **Audit** column for the appropriate state.



A **State Specific License Setup Audit** dialog box will display.

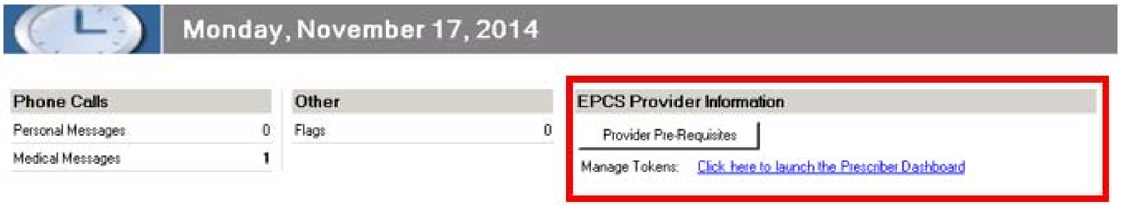


- **EPCS Prerequisites** – Clicking the **EPCS Prerequisites** button above the main grid will display a read-only **Onboarding Requirements** window with all information necessary for enrolling in EPCS.

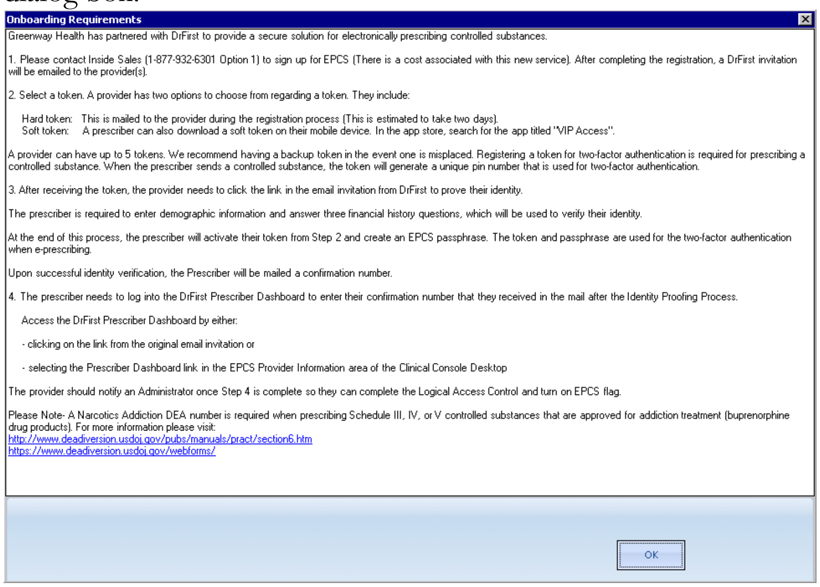


Clinical Console

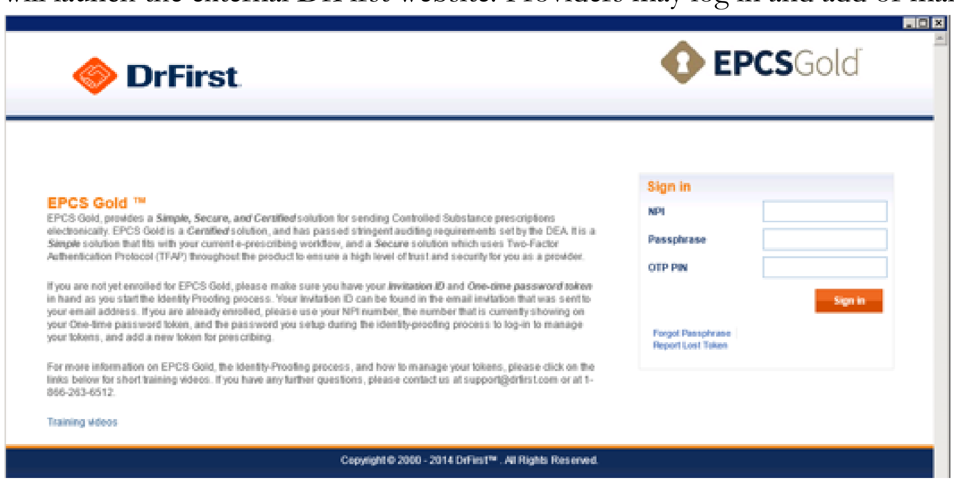
EPCS Provider Information – Users logged into Clinical Console as EPCS providers may access the **EPCS Provider Information** section to view EPCS prerequisites and manage tokens.



- Clicking the **Provider Pre-Requisites** button will display the **Onboarding Requirements** dialog box.



- Clicking the **Click here to launch the Prescriber Dashboard** link under **Manage Tokens** will launch the external DrFirst website. Providers may log in and add or manage tokens.

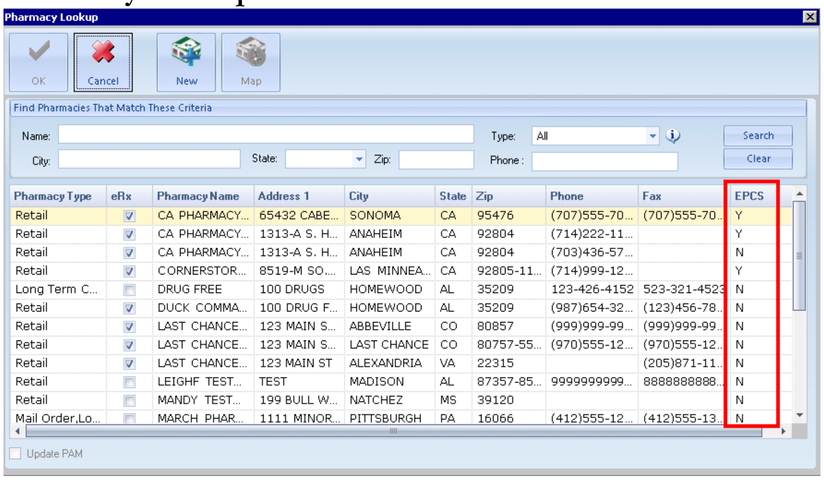


Prescribing with EPCS

Providers will prescribe controlled substances under EPCS in the same manner as non-controlled medications. An EPCS-enabled pharmacy must be selected to send the appropriate prescription via eRx.

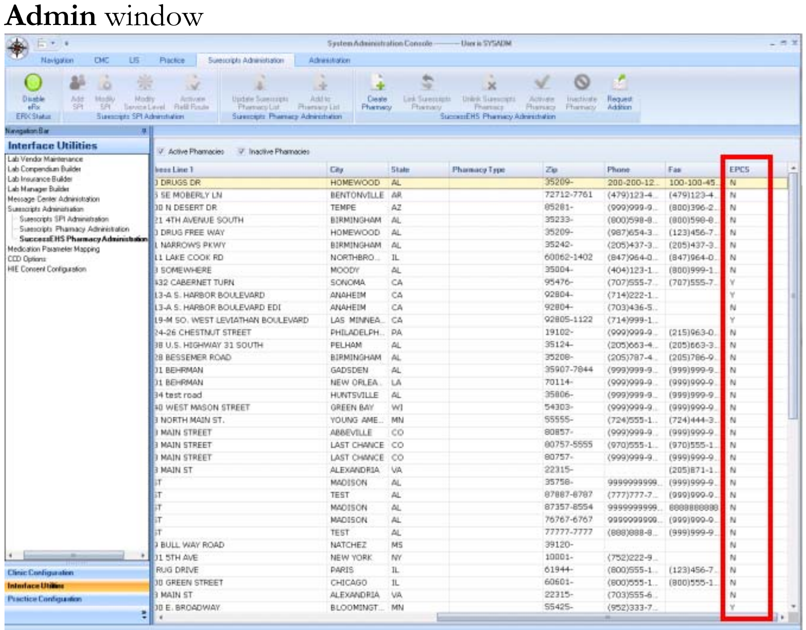
An **EPCS** column has been added to the following places in the system to indicate that specific pharmacies are EPCS pharmacies and capable of sending controlled substances via eRx:

- **Pharmacy Lookup screen**

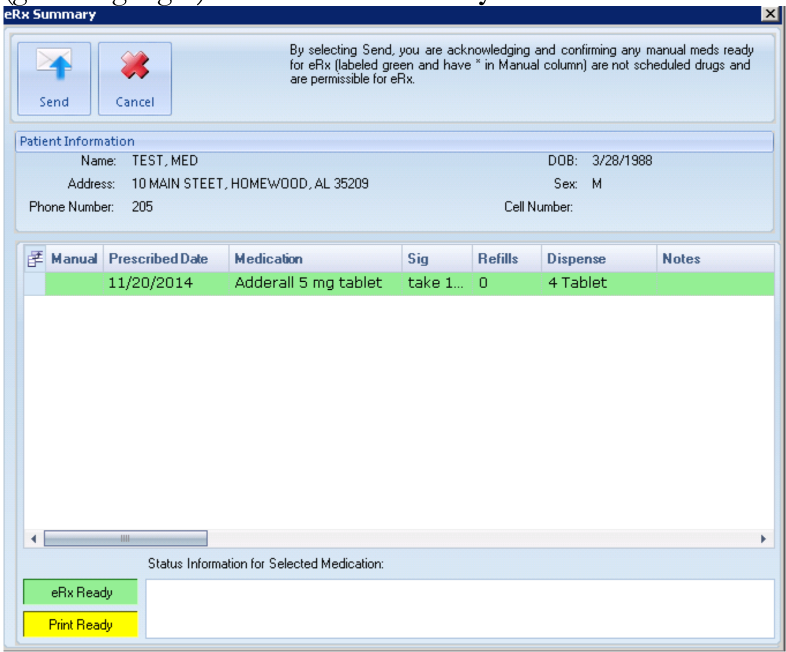


Available in the following places in the system:

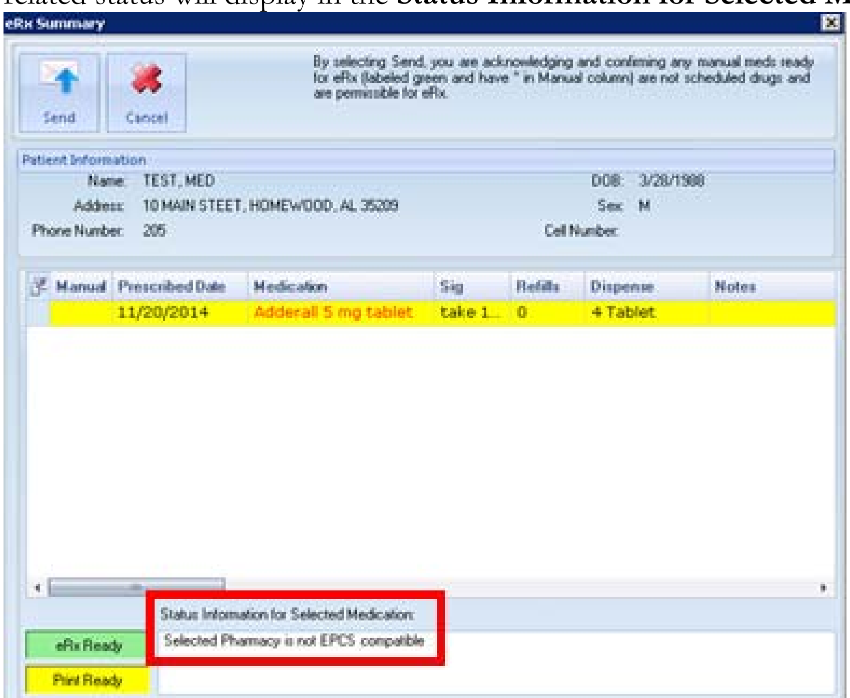
- **Patient Administration / Check In / Charge Entry** – **Additional Patient Data** tab
- **Clinical Console** – **Find Pharmacy** dialog box for refill requests on the **Medications** ribbon
- **Medications** – **Active Meds** tab and **Prescribe Medications** window
- **System Administration Console, Interface Utilities** – **SuccessEHS Pharmacy Admin** window



A **Y** will display in the **EPCS** column for pharmacies that are EPCS-enabled. When an EPCS pharmacy is selected for eRx transmission, the medication will display as **eRx Ready** (green highlight) on the **eRx Summary** screen and can be sent per the normal eRx method.



Medications that are not transmittable via eRx will only display as **Print Ready**. The EPCS-related status will display in the **Status Information for Selected Medication** field.



Available messages include the following:

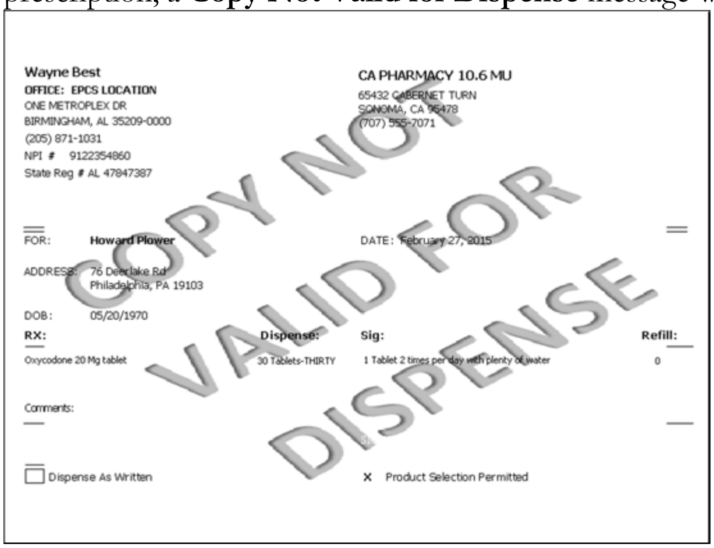
– **Selected Pharmacy is not EPCS compatible.**
– **The current user is not configured to electronically send controlled substances.**

- – **The selected medication does not have the "Eligible for eRx" flag enabled in the CMC Starter Set.**
- – **The selected controlled substance has already been printed and cannot be electronically sent.**
- – **The selected controlled substance has already been electronically sent and cannot be electronically sent again.**

Printing vs. eRx Transmission

Controlled substances may only be printed or transmitted via eRx **one time**. The **Method** field on the **eRx Summary** window will display the most recent method of transmission.

- If the user transmits a controlled substance successfully via eRx and then prints the prescription, a **Copy Not Valid for Dispense** message will display on the printed copy:



Wayne Best
OFFICE: EPCS LOCATION
ONE METROPLEX DR
BIRMINGHAM, AL 35209-0000
(205) 871-1031
NPI # 9122354860
State Reg # AL 47847387

CA PHARMACY 10.6 MU
65432 CABERNET TURN
SONOMA, CA 95478
(707) 555-7071

COPY NOT VALID FOR DISPENSE

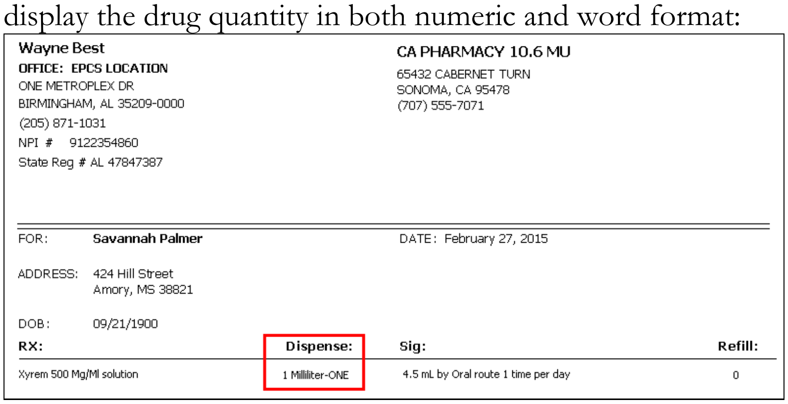
FOR: Howard Plower DATE: February 27, 2015
ADDRESS: 76 Deerlake Rd
Philadelphia, PA 19103
DOB: 05/20/1970

RX:	Dispense:	Sig:	Refill:
Oxycodone 20 Mg tablet	30 Tablets-THIRTY	1 Tablet 2 times per day with plenty of water	0

Comments:

☐ Dispense As Written X Product Selection Permitted

  - – The **Dispense** value on all printed prescriptions for controlled substances will display the drug quantity in both numeric and word format:



Wayne Best
OFFICE: EPCS LOCATION
ONE METROPLEX DR
BIRMINGHAM, AL 35209-0000
(205) 871-1031
NPI # 9122354860
State Reg # AL 47847387

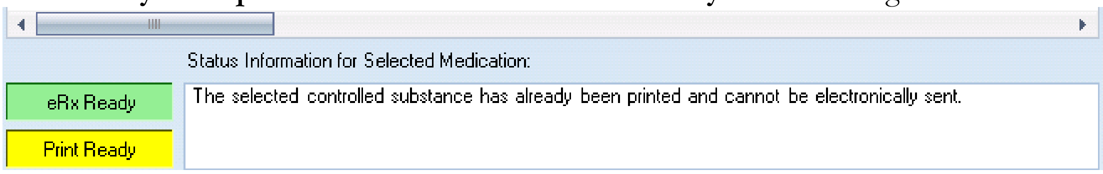
CA PHARMACY 10.6 MU
65432 CABERNET TURN
SONOMA, CA 95478
(707) 555-7071

FOR: Savannah Palmer DATE: February 27, 2015
ADDRESS: 424 Hill Street
Amory, MS 38821
DOB: 09/21/1900

RX:	Dispense:	Sig:	Refill:
Xyrem 500 Mg/Ml solution	1 Milliliter-ONE	4.5 mL by Oral route 1 time per day	0

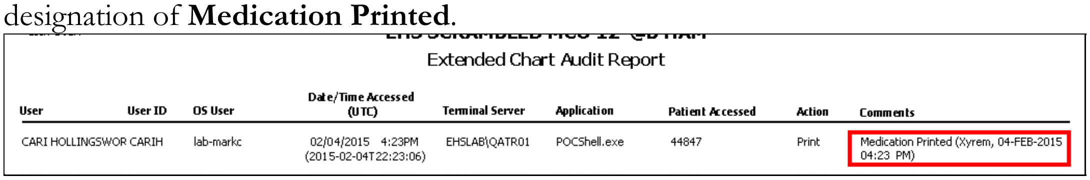
- If the eRx transmission fails, the user must print the medication. The printed copy will display an **Electronic Transmission Failed to [Pharmacy Name] at [Date/Time]** message.
- If the user prints the controlled substance first, the eRx option will be removed from **Medications.NET;** this will be indicated by a **"The selected controlled substance**

has already been printed and cannot be electronically sent" message.



- If a user prints a controlled substance more than once, a **REPRINT** label will display in the **State** field on the **eRx Summary** window.

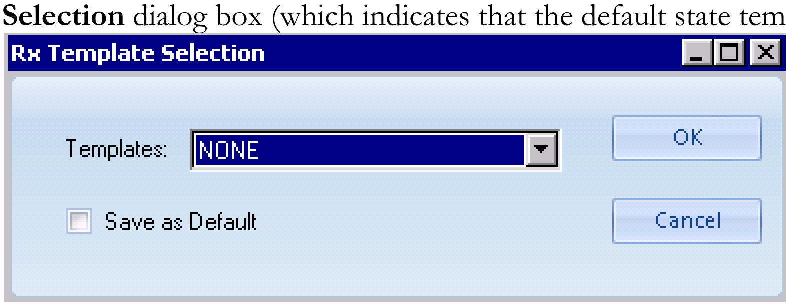
The **Copy Not Valid for Dispense** message (see above) will display on all reprinted prescriptions of controlled substances. Reprinted prescriptions of controlled substances will also be recorded on the **Chart Extended Audit Report** in classic **Security** with a designation of **Medication Printed**.


Extended Chart Audit Report

User	User ID	OS User	Date/Time Accessed (UTC)	Terminal Server	Application	Patient Accessed	Action	Comments
CARI HOLLINGSWOR	CARIH	lab-markc	02/04/2015 4:23PM (2015-02-04T22:23:06)	EHSLAB\QATR01	POCShell.exe	44847	Print	Medication Printed (Xyrem, 04-FEB-2015 04:23 PM)

Custom Templates

Providers may not use custom templates (created in **Patient Correspondence**) to print controlled substances via EPCS. All controlled substances will be printed using the default template for the particular state. Only the **None** selection will be available on the **Rx Template Selection** dialog box (which indicates that the default state template is in effect):



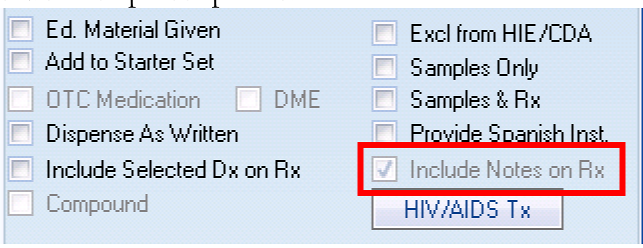
In addition, if multiple medications are being printed that include controlled and non-controlled substances, the default state template will also be used.

Notation Requirements for Controlled Substances

Notes on Controlled Substance Prescriptions

Controlled substances require pharmacy notes on all prescriptions.

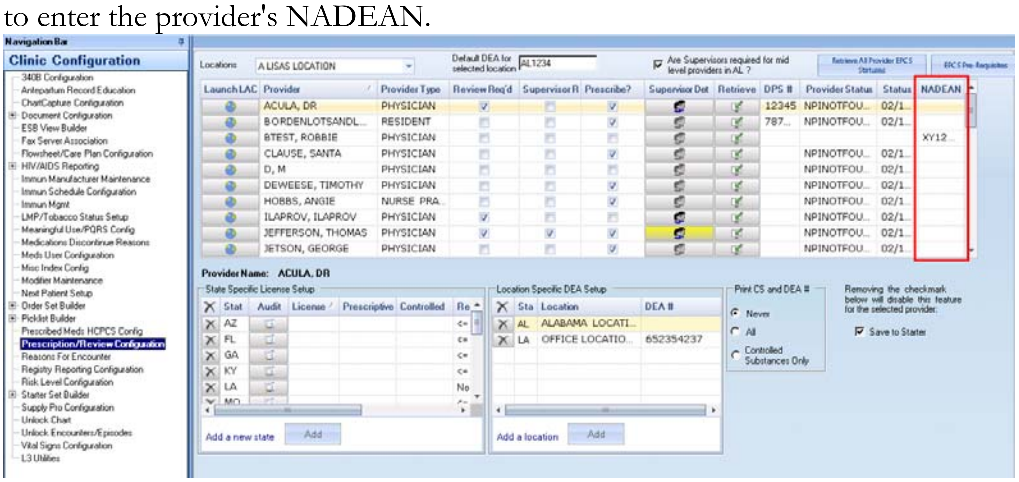
When a controlled substance is added to a patient's record, the **Include Notes on Rx** checkbox on the **Med Details** screen will automatically be selected and disabled for all controlled substance prescriptions.



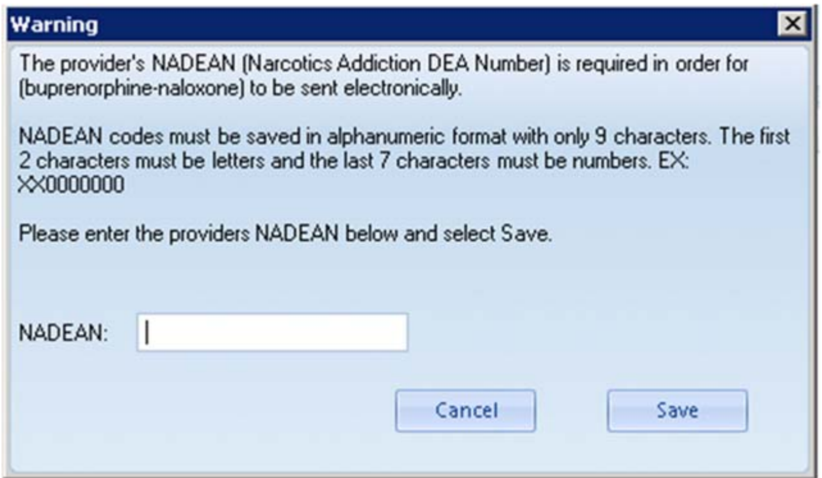
This selection is hard-coded and cannot be undone by the user unless the medication is deleted.

NADEAN

Schedule III, IV, or V narcotic drugs that are classified as a "detoxification treatments" or "maintenance treatments" require the provider's Narcotics Addiction DEA Number (NADEAN) on the pharmacy note. A **NADEAN** column has been added to the main grid on the **Prescription/Review Configuration** screen in **System Administration Console** for users to enter the provider's NADEAN.



If a NADEAN is not entered in this column, a warning message will display if the user attempts to transmit a prescription that requires the number.

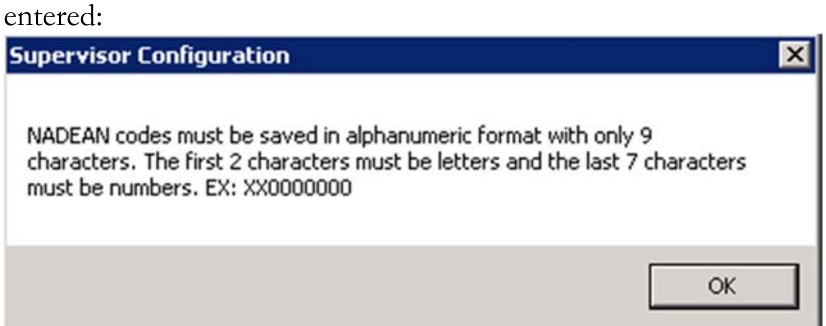


Users can enter the appropriate **NADEAN** and click **Save** to transmit the prescription. The number entered will populate in the main **NADEAN** column. The NADEAN number will also display in the **Notes** column on the **eRx Summary** window.

Note: The NADEAN number is included in the 210-character limit in the **Notes** field. If the prescriber's notes and the NADEAN number together exceed 210 characters, the validation will fail due to the medication exceeding the 210 character limit. The user will have to return to the **Med Details** tab in **Medications.NET** and edit the **Notes** character limit in order to send the prescription via eRx.

Note: NADEAN numbers are **nine-digit alphanumeric numbers**. The first two digits are alpha characters, with the remaining seven digits numbers (e.g., **AB1234567**).

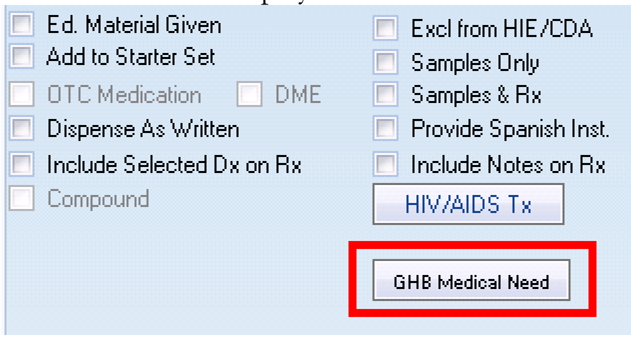
NADEAN numbers entered that do not follow this alphanumeric template will not be accepted by the system. A message will display if the NADEAN number is incorrectly entered:



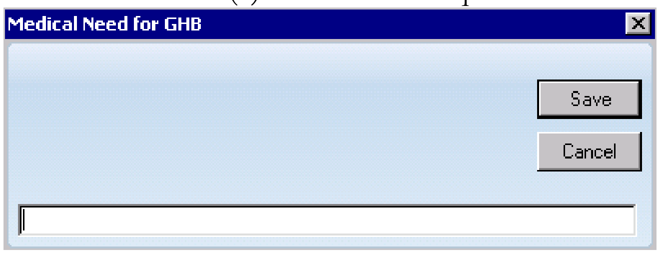
GHB

Medications for gamma-hydroxybutyric acid (GHB) must indicate the medical need for the prescription in the notes section. When a medication for GHB is prescribed, a **GHB Medical**

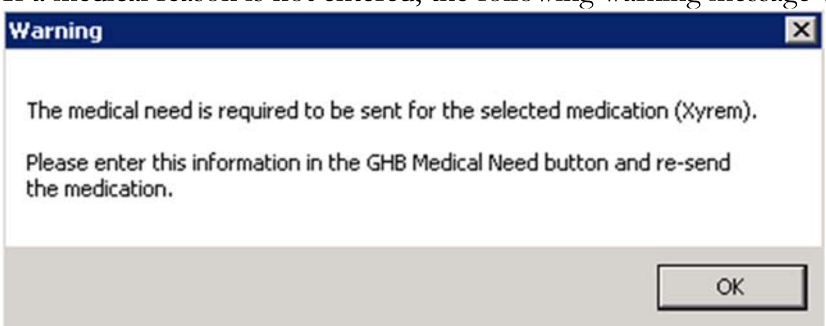
Need button will display on the **Med Details** tab on the **Add Medications** window.



Clicking this button displays a **Medical Need for GHB** dialog box. Users may enter the appropriate medical need information and click **Save** to include it in the notes section. A minimum of four (4) characters is required for the Medical Need for GHB to save.

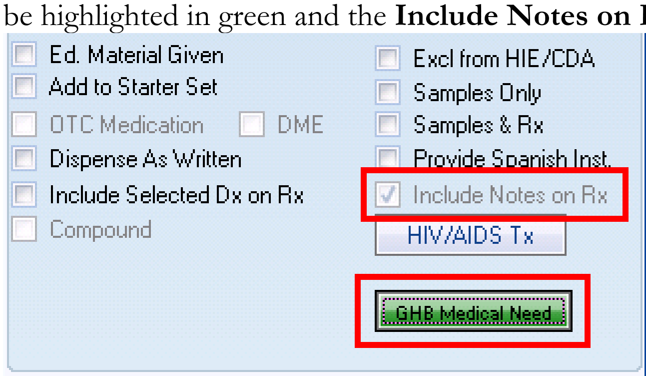


If a medical reason is not entered, the following warning message will display.



Users must enter the appropriate GHB medical need as above and re-send the medication.

After entering and saving the medical need information, the **GHB Medical Need** button will be highlighted in green and the **Include Notes on Rx** checkbox will automatically be selected.

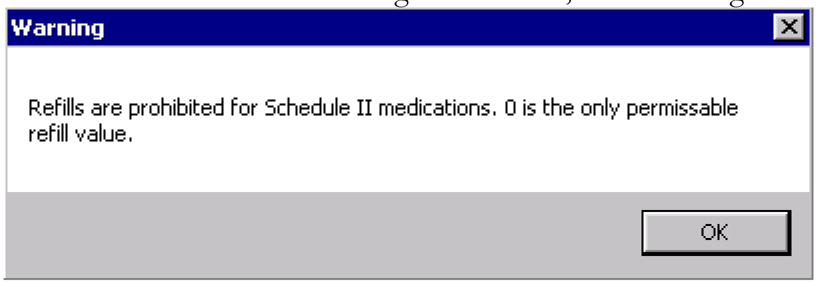


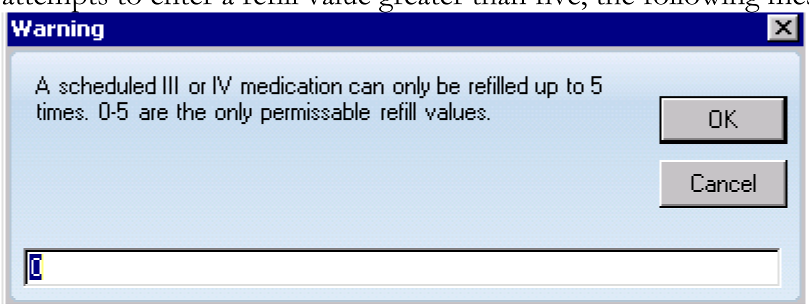
This selection is hard-coded and cannot be undone by the user unless the GHB Medical Need information is deleted.

Refilling Controlled Substances

Restrictions for Number of Refills

Controlled substances have restrictions on the number of refills available to them.

- **Schedule II** drugs are only allowed single-dispense prescriptions. If the user attempts to enter any refill value except zero (0), **or** if the user adds a Schedule II drug from the starter set that has a refill value greater than 0, the following message will display:


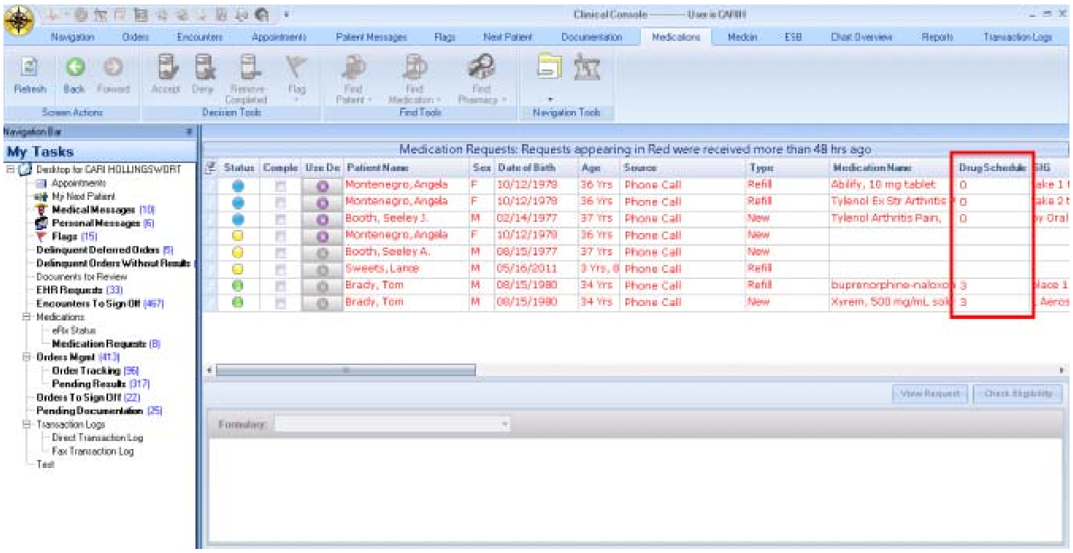
Users may click **OK** to change the refill value to 0. Refill values for medications added from the starter set will automatically be set to 0 when the user clicks **OK**.
- **Schedule III and IV** drugs are allowed a maximum of five (5) refills. If the user attempts to enter a refill value greater than five, the following message will display:


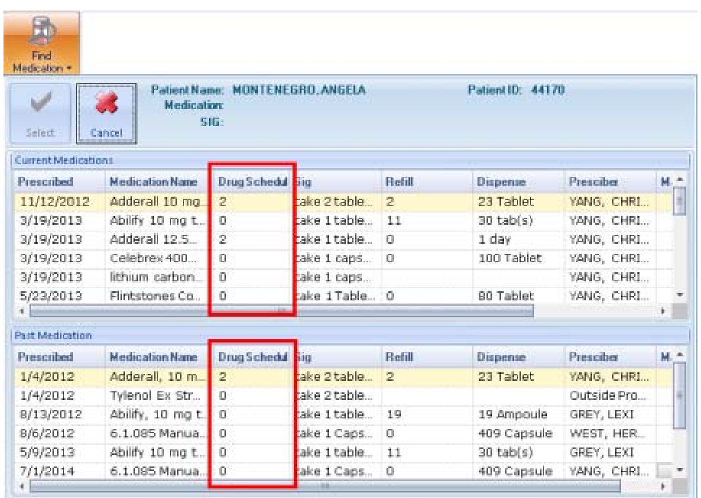
Users may enter a permissible value in the field and click **OK** to change the value.
- **Schedule V** drugs do not have a maximum refill number.

Refill Requests with EPCS

Only EPCS providers may accept refill requests for controlled substances on the Me**dication Requests** window in Clinical Console. The following updates have been made to aid providers in filling such requests.

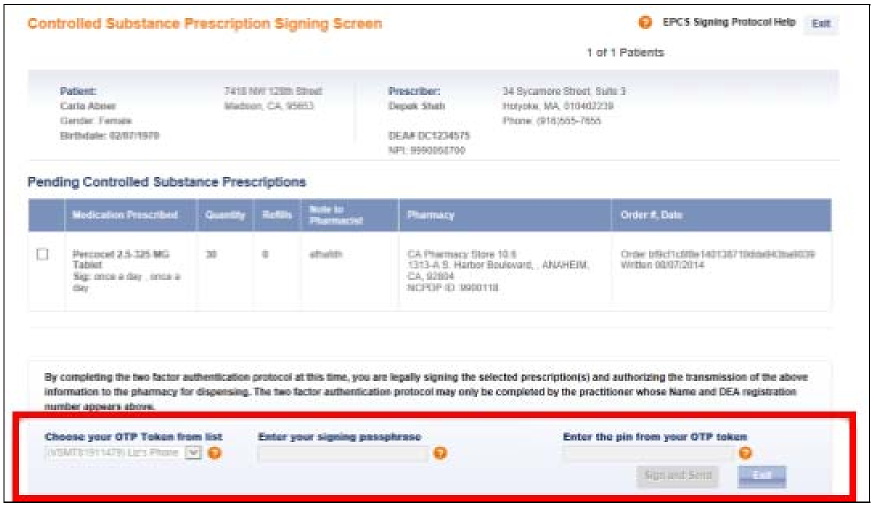
- **Drug Schedule column** – A **Drug Schedule** column has been added to the main **Medication Requests** grid and the **Find Medication** dialog box that displays the schedule number of the medication.





  - The **Drug Schedule** column will populate the drug schedule for all medications that have a match in the FDB database. If no match exists, the field will be blank until the user maps the drug to the correct medication.
  - If the refill request is by phone (where no medication data exists), the field will be blank by default.

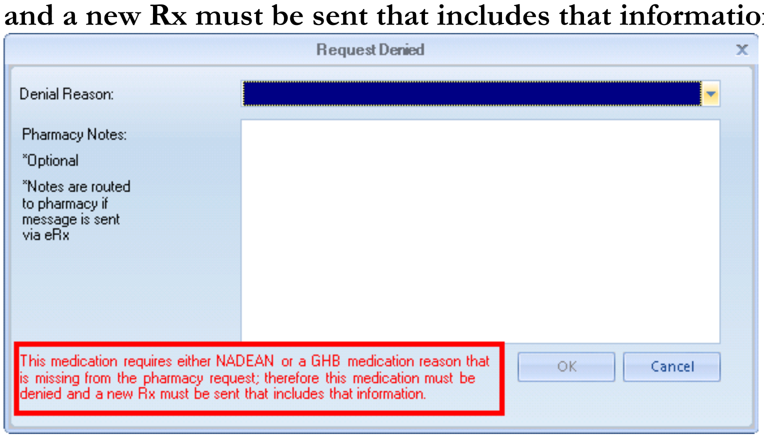
- **Accept Workflow** – When the user clicks **Accept** on a valid refill request and validates all information on the **Request Accepted** window, the DrFirst website will launch.



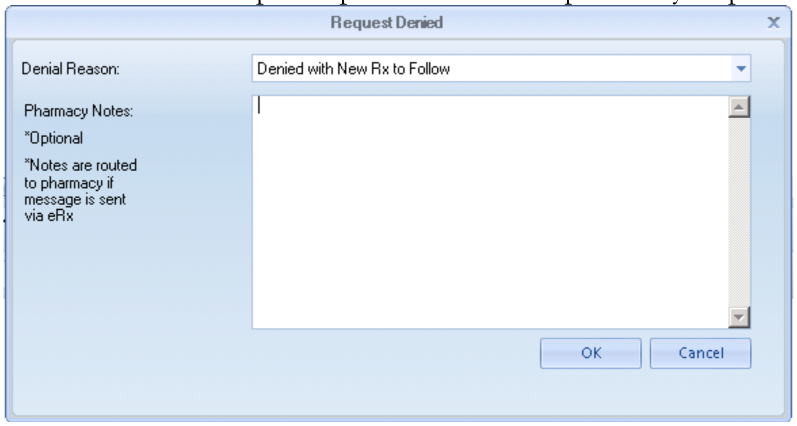
Providers must enter the appropriate token/passphrase and click **Sign and Send** to send the refill request. No requests will be sent without the correct token/passphrase.

- **NADEAN/GHB** – Refills for medications that fall under the NADEAN and/or GHB requirements must include all appropriate NADEAN and GHB information to be processed. If the appropriate information is not entered, the **Request Denied** dialog box will display with the following indicator:

  "This medication requires either NADEAN or a GHB medication reason that is missing from the pharmacy request; therefore this medication must be denied and a new Rx must be sent that includes that information."



- **Deny Workflow** – When the user clicks **Deny** on a Surescripts refill request for a controlled substance and selects the **Denied with New Rx to Follow** denial reason, the pharmacy that the request originated from will be **locked in** for the new prescription. The user will not be able to edit the receiving pharmacy in the new prescription, leaving the user to send the prescription to the same pharmacy or pick a different denial reason.



– If a user prints a prescription that derived from the **Denied with New Rx to Follow** workflow, the printed prescription will show the **Rx Reference Number** that corresponds to the original denied refill request.

  A **This prescription is in response to an electronic refill renewal for a controlled substance that was denied** indicator will display at the bottom of the printed prescription.