Greenway SuccessEHS / Version 8.10

SuccessEHS Release Notes 8.10

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Revision History

7/28/16

- Removed Commonwell registration information.

8/16/16

- Added issue **V810-293** (Misc. Configuration, New Theme Configuration Option)
- Added issue **V810-308** (User Preferences, Patient Age/DOB Selectable in Patient Header)

8/18/16

- Draft status removed.

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All Modules

Case-Sensitive Login Passwords

Project #V810-202

Login passwords for the SuccessEHS system will now be case-sensitive as of this software release.

- New users in the system are required to enter case-sensitive passwords.
- Current user passwords will remain the same (i.e., will remain non-case-sensitive) unless and until a user changes his/her password; the new password will be case-sensitive.

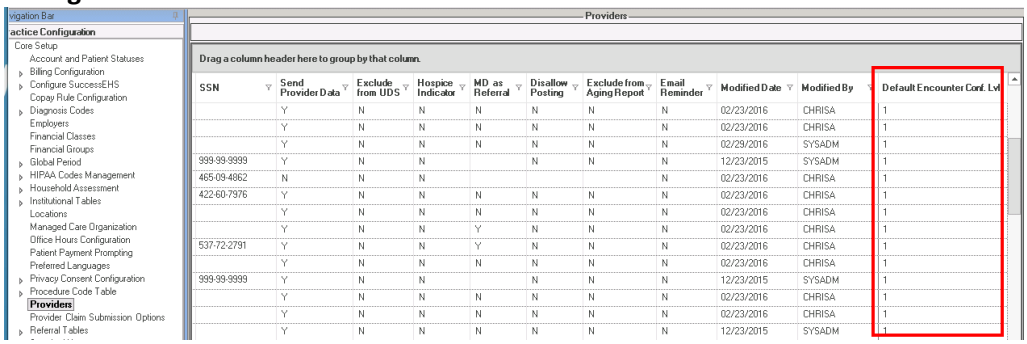
Changes to Encounter Confidentiality Level Settings

Project #V810-18, V810-142, V810-194, V810-195

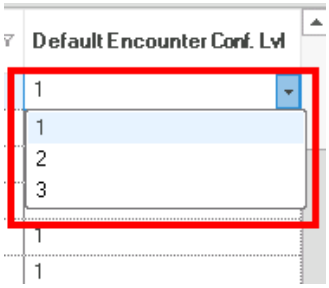
The following changes have been made to confidentiality settings for providers and encounter items.

Providers

A **Default Encounter Confidentiality Level** column has been added to the **Providers** table under **Practice Configuration**.



You may set the appropriate provider's default confidentiality level by selecting the level from the drop-down list.



Note - Please note: If the examining provider is changed on an encounter, the encounter's confidentiality level will be changed to the examiner's default confidentiality level.

All items added or linked to the encounter before the provider change will maintain the confidentiality level they had when the items were added.

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Starter Sets/Picklists/Order Sets

Confidentiality levels are now determined by the overall encounter level. To align items with this change, the **Confidentiality Level** function has been removed from the **Edit Defaults** screen in the following starter set, picklist, and order set categories:

- **Billable Medications**
- **Diagnoses**
- **Immunizations**
- **Path/Labs**
- **Prescribed Medications**
- **Procedures**
- **Radiology**
- **Mixed**

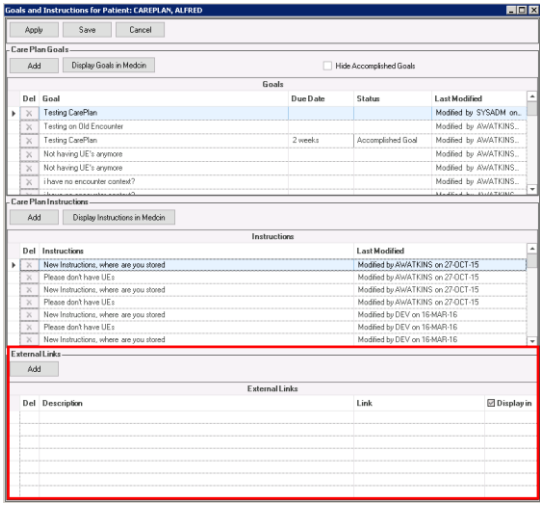
All items added from the above categories to an encounter will inherit the encounter's confidentiality level.

Chart

Goals/Instructions, New External Links Section

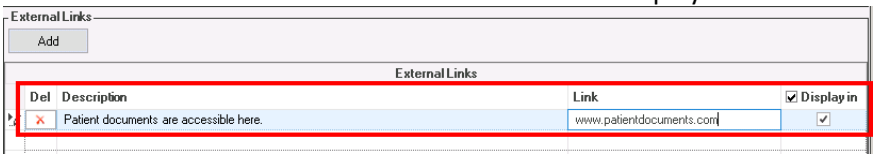
Project #V810-193

Users may add external links to patient goals/instructions in **Chart** via a new **External Links** section on the **Goals and Instructions** window.



To add an external link:

1. Click **Add** in the **External Links** section. A blank row displays in the table.



2. Enter an appropriate **Description** for the external link.
3. Enter the **Link** address.

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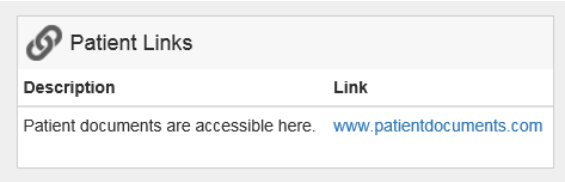
4. Click **Apply** to save your changes and add another link, or **Save** to save your changes and close the window.
5. The **Display in Facesheet** checkbox (enabled by default) ensures that the link information will display in the Facesheet in the new **Patient Links** section.



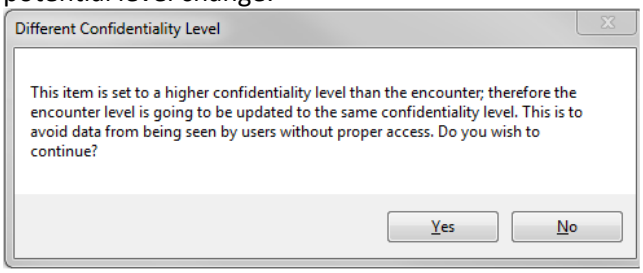
New Rules for Encounter Confidentiality Levels

Project #V810-18, V810-194, V810-200

Changes have been made to the default confidentiality settings for new encounters.

When a new encounter (billable or non-billable) is created, the default confidentiality level will be set based on the examining provider's confidentiality level as configured in the **Providers** table in the **System Administration Console**. (New encounters will no longer default to Level 1 confidentiality.)

- All data added to new encounter will be assigned the encounter's confidentiality level by default, including any data with confidentiality levels assigned in starter sets, picklists, and order sets.
- Users may not change an item's confidentiality level before adding the item to an encounter. You must add the appropriate item to the encounter before changing the confidentiality level on the appropriate **Order Detail** window.
- Adding an item at a higher confidentiality level than the encounter will update all items on the encounter to the higher level. A **Different Confidentiality Level** prompt will display alerting you to the potential level change:



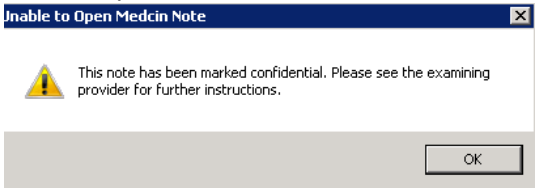
  Clicking **Yes** will update all items on the encounter to the higher level.

  Clicking **No** will not update the level, and will **not** save the higher-level item to the encounter.

- Changing a signed-off encounter's confidentiality level will update all data on that encounter to the new level.

Medcin

Users may not view Medcin encounters with a higher confidentiality level. The following message will display:



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This message will display when Medcin is launched via the icon or when trying to view a Medcin note from the **Documents** tab in **Chart**.

On the **Encounters** tab and **Encounter Detail** screens, the **Medcin** section (and all documentation tabs) will be grayed out.

Code Selector/Addendum

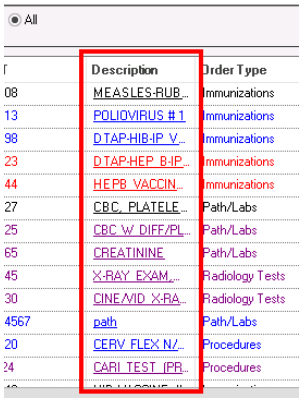
Users may not add items to an encounter via the **Code Selector** or **Addendum** options to encounters with a higher confidentiality level. Both functionalities will be disabled in these instances.

Orders, New Order Result Preview

Project #V810-301

Users may now preview order results/attachments directly on the **Orders** tab in **Chart** without accessing the **Order Detail** window.

The data in the **Description** column now displays as hyperlinks to order results.



Users may click or hover the cursor over the appropriate description text to preview the results in a pop-up window. Text results will display on the **Results** tab; attachments (e.g., images) will display on the **Attachments**

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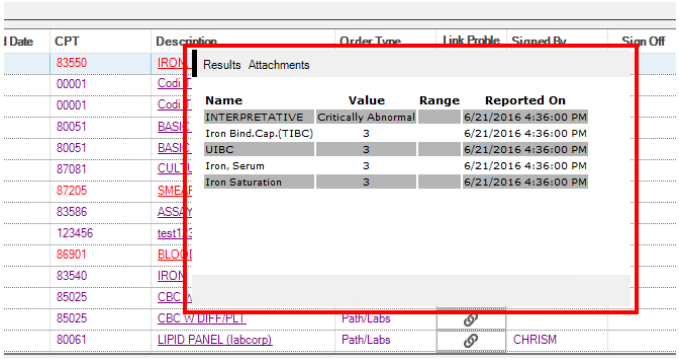
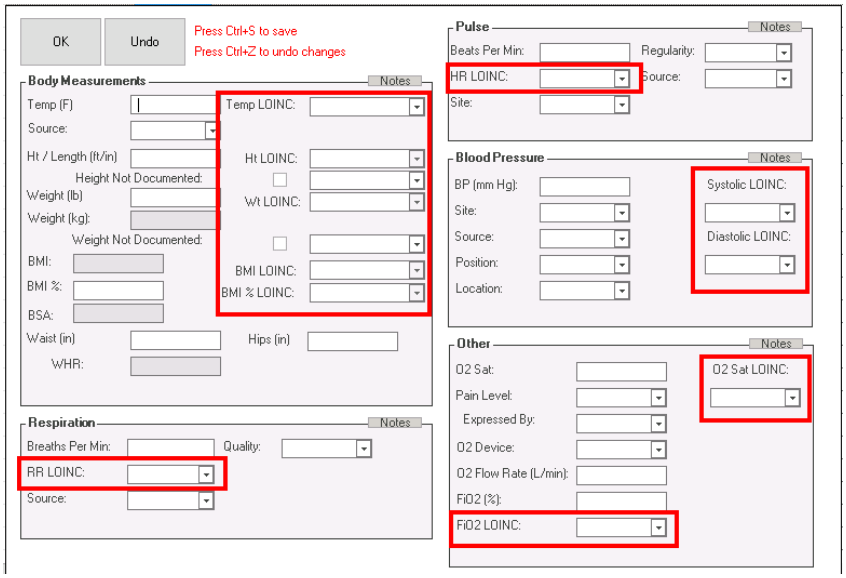
tab.



Vitals, LOINC Code Selections Added

Project #V810-25

LOINC code fields have been added to several vital measurements on the **Detailed** vital signs dialog box.



Default LOINC codes will populate the appropriate fields as users enter vital signs for the patient. Users may select other LOINC options depending on the patient's specific condition at the time of measurement.

If the user deletes a vitals measurement, the **LOINC** field will display as blank.

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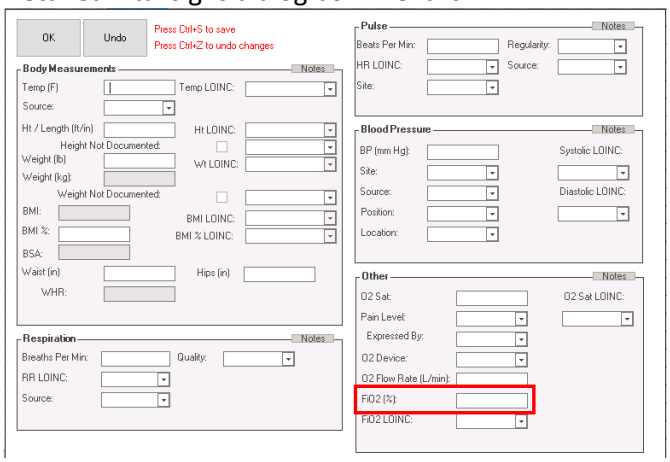
Vitals, New FiO2 Measurement

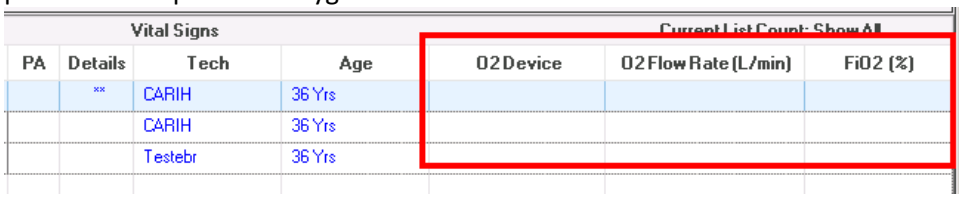
Project #V810-90, V810-108

Inhaled oxygen concentration (FiO2) has been added as a new measurement in the **Other** section on the **Detailed** vital signs dialog box in **Chart**.

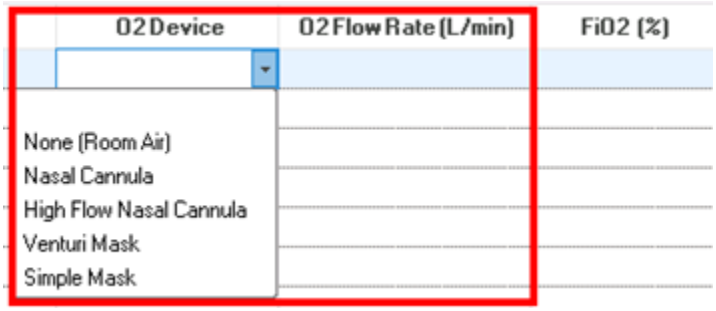


This measurement tracks whether a patient is on oxygen in order to accurately assess the patient's oxygen levels.

O2 Device, O2 Flow Rate, and **FiO2 (%)** columns have been added to the main **Vitals** grid to provide a complete picture of the patient's oxygen state.



Users may select the patient's appropriate **O2 Device** and enter the **O2 Flow Rate** from the main grid or on the **Detailed** dialog box. The **FiO2(%)** will populate automatically based on the flow rate.



O2 Device, O2 Flow Rate, and **FiO2 (%)** measurements will display in the following places in the system as per the standard rules for vitals measurements:

- **Specified View** – Measurements will display in separate columns in the **Vital Signs** section if recorded.
- **Care Plan** – Measurements will display as separate selectable rows in the **Vital Signs** section for both Encounter and Custom views.
- **Medcin** – The **FiO2** measurement will display in the **Vitals** section (Medcin ID **223128**)
- **Patient Correspondence/PNG merge fields** – Measurements will display via the following merge fields for all templates except Medication/Rx templates:

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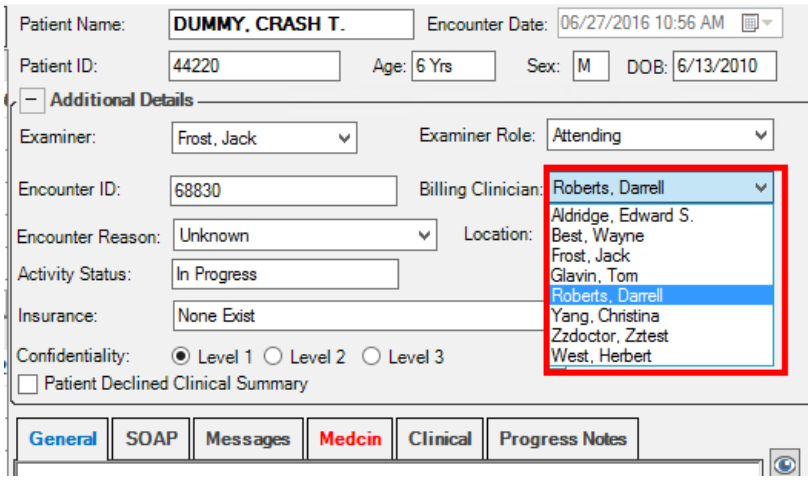
  - **VitalsO2Device** (displays the O2 device if documented for the selected encounter)
  - **VitalsO2FlowRate** (displays the flow rate if documented for the selected encounter)
  - **VitalsFiO2** (displays the FiO2 rate if documented or auto-populated for the selected encounter)
- **PNG** formatted data widget – Measurements will display in separate columns in the **Vital Signs** section if recorded.
- **CEM** – Measurements will display when rules are run if the (new) **O2 Device** and **FiO2** selections in the **Vital Signs** section are configured to pull.
- **Encounter Detail** – Measurements will display in separate columns on the **Vitals** tab if recorded.
- **Reports –** The **FiO2** measurement will display if recorded on the **Vital Signs Summary** and all **Encounter Summaries** reports.

Clinical Console

Encounter Detail, Billing Clinician Editable

Project #V810-302

The **Billing Clinician** field on the **Encounter Detail** window in Clinical Console and **Chart** has been changed to a drop-down list that enables users to change the billing clinician for the encounter in order to match it to the examining provider.



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Medications, Changes to eRx History Tab

Project #V810-112

Changes have been made to the **eRx History** tab on the **Medications** screen in Clinical Console.

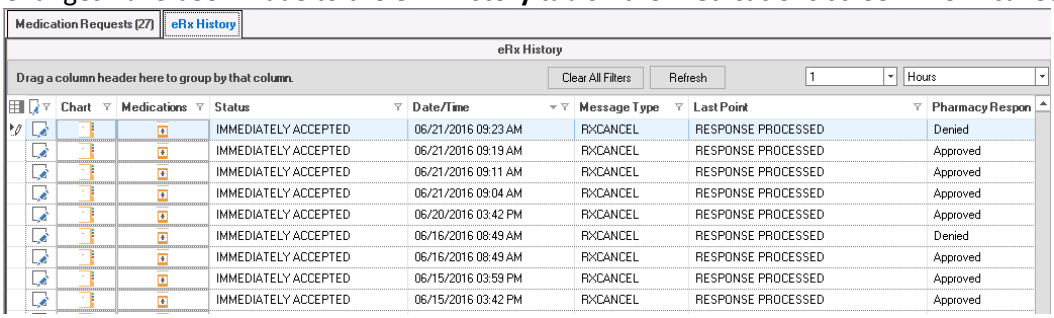

Chart	Medications	Status	Date/Time	Message Type	Last Point	Pharmacy Respon
		IMMEDIATELY ACCEPTED	06/21/2016 09:23 AM	RXCANCEL	RESPONSE PROCESSED	Denied
		IMMEDIATELY ACCEPTED	06/21/2016 09:19 AM	RXCANCEL	RESPONSE PROCESSED	Approved
		IMMEDIATELY ACCEPTED	06/21/2016 09:11 AM	RXCANCEL	RESPONSE PROCESSED	Approved
		IMMEDIATELY ACCEPTED	06/21/2016 09:04 AM	RXCANCEL	RESPONSE PROCESSED	Approved
		IMMEDIATELY ACCEPTED	06/20/2016 03:42 PM	RXCANCEL	RESPONSE PROCESSED	Approved
		IMMEDIATELY ACCEPTED	06/16/2016 08:49 AM	RXCANCEL	RESPONSE PROCESSED	Denied
		IMMEDIATELY ACCEPTED	06/16/2016 08:49 AM	RXCANCEL	RESPONSE PROCESSED	Approved
		IMMEDIATELY ACCEPTED	06/15/2016 03:59 PM	RXCANCEL	RESPONSE PROCESSED	Approved
		IMMEDIATELY ACCEPTED	06/15/2016 03:42 PM	RXCANCEL	RESPONSE PROCESSED	Approved

1. The following columns have been added to the main table:
   - **Chart** – Clicking the **Chart** button for a record will open **Chart** for the appropriate patient.
   - **Medications** – Clicking the **Medications** button will open the **Medications** module for the appropriate patient.
   - **Pharmacy Response** – Displays the appropriate response from the pharmacy regarding the prescription as follows:
     - Initial request – **Approved** or **Denied**
     - Change request or Cancel request – **Dispensed, Not Dispensed,** or **Partially Dispensed**
   - **Pharmacy Notes** – Displays any notes entered by pharmacy personnel relating to the prescription.
2. The **Date** field has been renamed to **Date/Time** and now displays the date/time of the eRx transmission.
3. The **Status** column now displays any change requests or cancel requests for prescriptions with a **CANRX** indicator. If a cancel request has not received a response from the pharmacy after 24 hours, the row will display in **red text**. Once a response is received, the row will revert to black text.

Medication Requests, Changes to Medication Mapping

Project #V810-208

The following changes to the mapping of medications on the **Medication Requests** screen in order to match the medication requests to the medications in **Chart**:

- The mapping function will match medication requests based on the following criteria, in descending order of importance:
  - the Message ID
  - the Prescriber Order Number
  - the NDC number for the medication

  If a match is found for at least one of the three, the **Accept** function will be enabled for the medication request.

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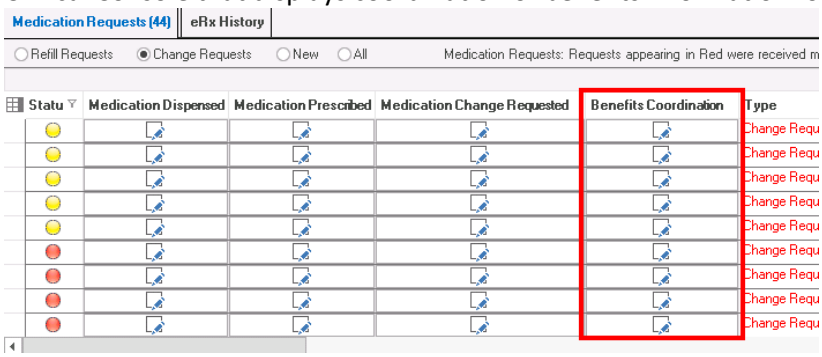
If the Accept function is enabled, and…	The system will do this…
The NDC numbers match	The renew/refill process will function as normal.
The NDC numbers do not match, **and** the refill amount, prescriber or pharmacy is different than the original Rx	Renew the medication with changes
The NDC numbers do not match, **and** the refill amount, prescriber or pharmacy match the original RX	Renew the medication as is

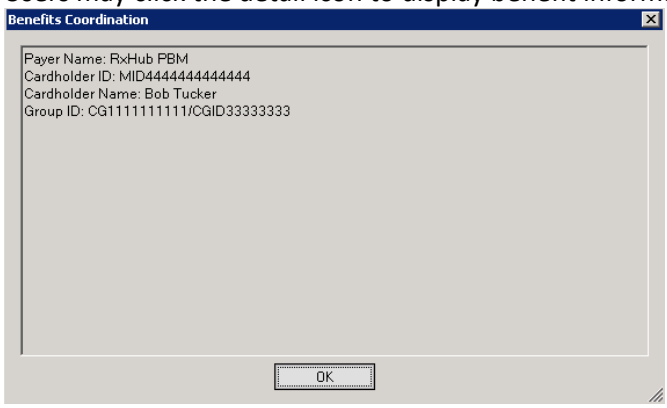
Medication Requests, New Benefits Coordination Column

Project #V810-216

A **Benefits Coordination** column has been added to the **Medication Requests** tab on the **Medications** screen in Clinical Console that displays coordination of benefits information for a patient.



Users may click the detail icon to display benefit information for the patient.



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Medication Requests, New Confidentiality Rules

Project #V810-226

Confidentiality rules on the Medication Requests screen have been updated as follows.

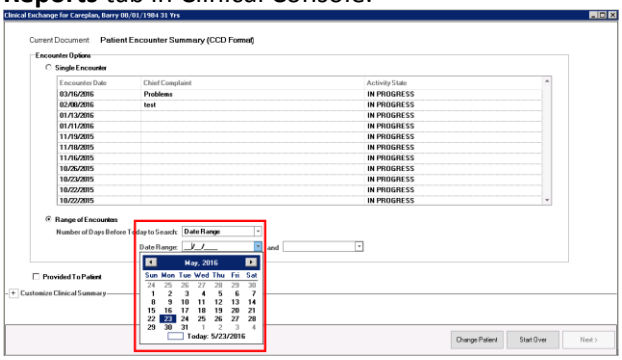
If the confidentiality level of a medication is higher than the level of the current user, the following will be in effect:

- The **Name, NDC, SIG, Pharmacy Notes,** and **Phone Call Reason** fields will all display a **"Confidential"** label.
- The **Medication Dispensed, Accept, Deny,** and **Find Medication** buttons will be disabled.
- The **Details** section will be disabled.

Reports, Date Range Option Added for CCDA Documents

Project #V810-219

A **Date Range** option has been added when creating CCDA documents via the **Clinical Exchange** option on the **Reports** tab in Clinical Console.

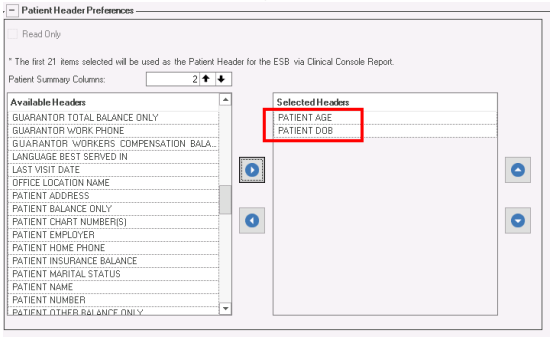


Date Range has been added as a selection in the **Number of Days Before Today to Search** drop-down list on the **Clinical Exchange** window. When this option is selected, the **Date Range** drop-down calendars will be enabled. Users may select the date range to search from the calendars (or enter the dates manually in each field).

User Preferences, Patient Age/DOB Selectable in Patient Header

Project #V810-308

Patient Age and **Patient DOB** may both be selected to display in the patient header at the same time in the **Patient Header User Preferences** section of **User Preferences** in Clinical Console (previously, only one or the other were selectable).



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Meaningful Use / PQRS / CQM

eCQM Updated Measures for 2016

Project #V810-136, 143, 170, 172, 173, 174, 175, 214, 218, 225, 241, 258, 281, 285, 286, 288

The following CQM measures have been updated to be compliant with the 2016 CQM measure specifications:

- eMeasure 2 – Screening for Clinical Depression and Follow-Up Plan
- eMeasure 65 – HTN: Improvement in Blood Pressure
- eMeasure 69 – BMI Screening and Follow-Up
- eMeasure 117 – Childhood Immunization Status
- eMeasure 122 – Diabetes: A1C Poor Control
- eMeasure 123 – Diabetes: Foot Exam
- eMeasure 124 – Cervical Cancer Screening
- eMeasure 126 – Use of Appropriate Medications for Asthma
- eMeasure 130 – Colorectal Cancer Screening
- eMeasure 138 – Tobacco Use - Screening & Cessation
- eMeasure 146 – Testing for Children with Pharyngitis
- eMeasure 148 – HbA1c Test for Pediatric Patients
- eMeasure 155 – Child & Adolescent Weight Assessment & Counseling
- eMeasure 164 – IVD Aspirin/Antithrombotic Use
- eMeasure 165 – Controlling High Blood Pressure

Client toolkits may be accessed via the Greenway Customer Community website.

eCQM, New Contraindications Added to Immunizations

Project #V810-259

The following contraindication options for Immunization were added to support eCQM measures:

- Allergy (anaphylactic) to diphtheria, tetanus and acellular pertussis (DTaP) vaccine
- Allergy (anaphylactic) to Inactivated Polio Vaccine (IPV)
- Allergy (anaphylactic) to Hemophilus Influenza B (HiB)
- Allergy (anaphylactic) to Hepatitis B Vaccine
- Allergy (anaphylactic) to Pneumococcal Conjugate Vaccine
- Allergy (anaphylactic) to Hepatitis A Vaccine
- Allergy (anaphylactic) to Rotavirus Vaccine
- Allergy (anaphylactic) to Influenza Vaccine

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eCQM, new SNOMED Code for Referral Specialties

Project #V810-246

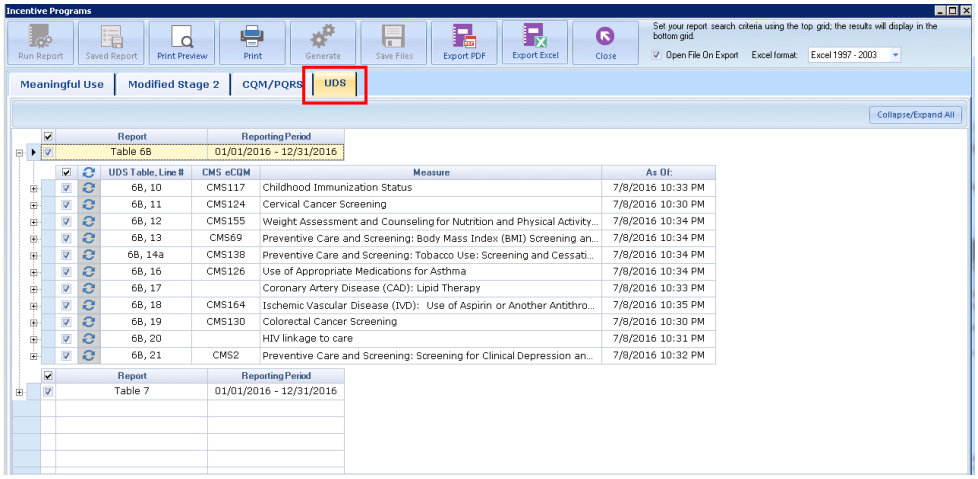
The following SNOMED referral specialty codes for depression screening were added to support eCQM measures:

- **103696004** – Patient referral to specialist (procedure)
- **14129001 –** History and physical examination, follow-up for emotional or mental disease (procedure)
- **183524004** – Referral to psychiatry service (procedure)
- **183583007** – Refer to mental health worker (procedure)
- **183851006** – Referral to clinic (procedure)
- **183866009** – Referral to emergency clinic (procedure)
- **305922005** – Referral by mental health counselor (procedure)
- **306136006** – Referral to liaison psychiatry service (procedure)
- **306137002** – Referral to mental handicap psychiatry service (procedure)
- **306138007** – Referral to psychogeriatric service (procedure)
- **306204008** – Referral to psychogeriatric day hospital (procedure)
- **306226009** – Referral to mental health counseling service (procedure)
- **306227000** – Referral for mental health counseling (procedure)
- **306252003** – Referral to mental health counselor (procedure)
- **308459004** – Referral to psychologist (procedure)
- **401174001** – Depression management program (regime/therapy)
- **429387009** – Referral by psychologist (procedure)
- **61801003 –** Patient referral for psychiatric aftercare (procedure)

Incentive Programs, New UDS Tab

Project #V810-221

A **UDS** tab has been added to the **Incentive Programs** window in Clinical Console that displays information on all UDS clinical measures that align with the respective CQM measures on the **CQM** tab.



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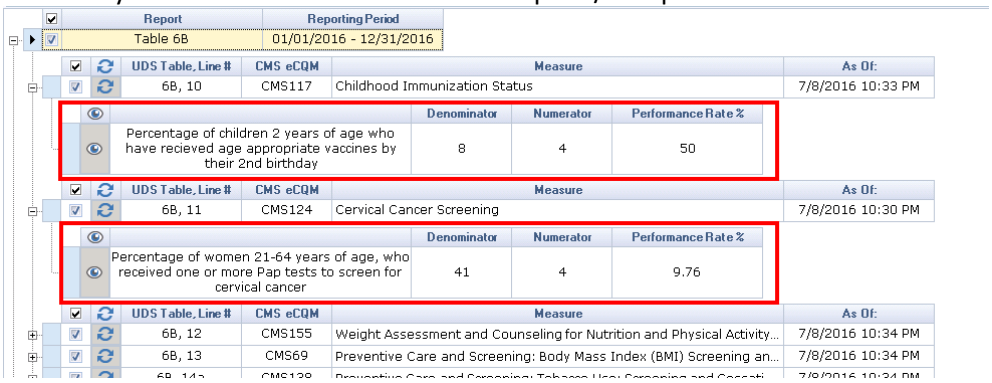
The **UDS** tab displays the specific query tables that govern UDS clinical quality measures. Users may click the ⊞ and ⊟ buttons to expand/collapse the UDs reports, or click the **Collapse/Expand All** button to expand or collapse all reports on screen.

The following information is available for viewing:

- **UDS Table, Line #** – Displays the specific place in the UDS table where the clinical information resides.
- **CMS eCQM** – Displays the CQM measure associated to the UDS clinical measure. (Note: Not all UDS measures will have a corresponding CQM measure.)
- **Measure** – Displays the measure title.
- **As Of** – Displays the date/time the clinical measurements were last calculated.

Users may click the ⊞ and ⊟ buttons to expand/collapse each measure line to view the calculations.



Calculations include the measure description, **Denominator** and **Numerator** totals, and the **Performance Rate %** for the measure.

Users may click the manual refresh button (↻) by each measure to re-run the individual calculations.

Note - Please note the following:

If the database has the UDS flag selected, the query will run nightly for all clinical measures.

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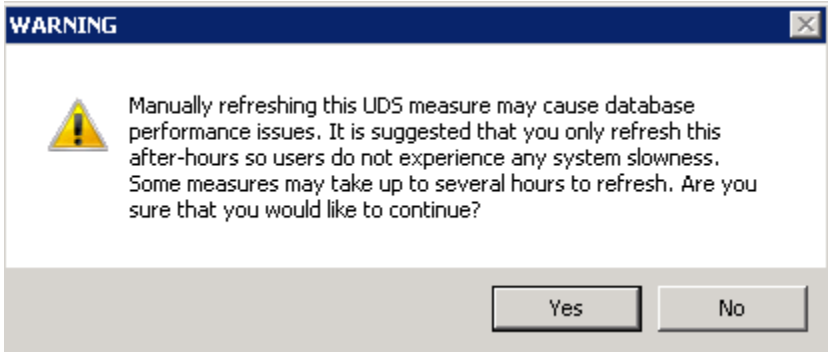
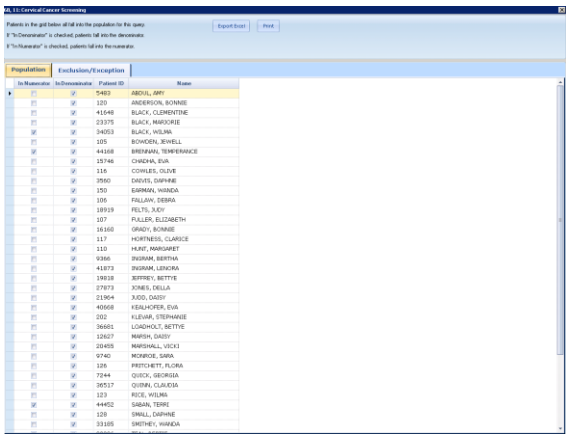
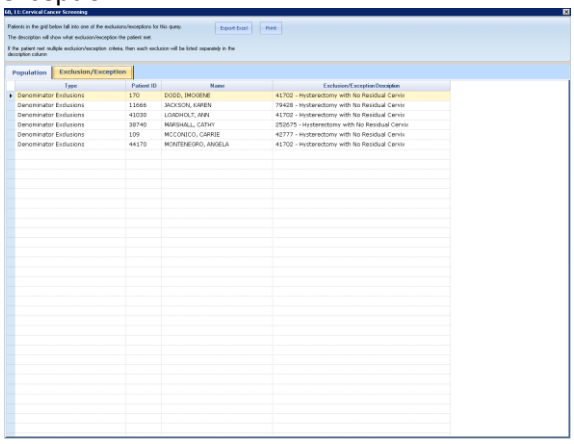
Separate measures can be run manually – but it is strongly suggested to run these after-hours due to performance issues it can cause. A message displays upon manual refresh alerting the user to this possibility:



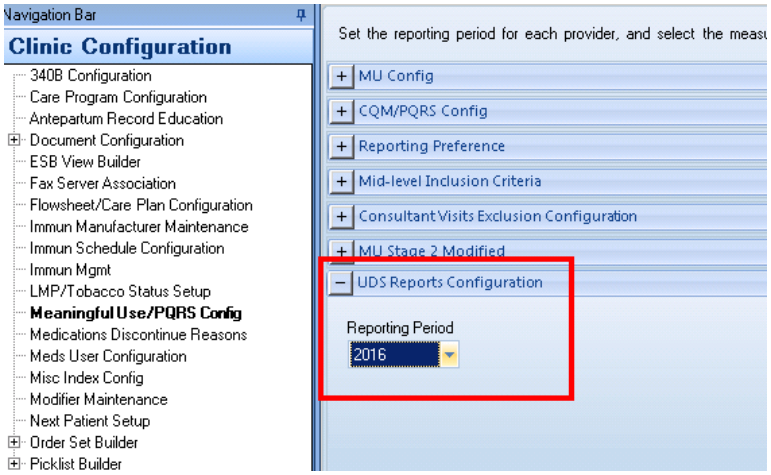
Users may click the information icon ( ) to view a detail dialog box with the specific patients used for the measure calculation. The **Population** tab displays all patients in the measure and whether they are included in the denominator and/or numerator. The **Exclusion/Exception** tab displays all patients excluded/excepted from the calculation and the reason for the exclusion/exception.





Configuring the UDS Tab

The UDS tab is configured by setting the appropriate **Reporting Period** in the (new) **UDS Reports Configuration** section on the **Meaningful Use/PQRS Config** screen under **Clinic Configuration** in the **System Administration Console**.



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Sexual Orientation Findings Map to Patient Administration

Project #V810-166

Medcin findings documented for sexual orientation will populate in the appropriate fields on the **Demographics** tab in **Patient Administration**.

The following Medcin findings will map on a 1:1 basis:

Orientation	Medcin Finding	Maps to Patient Administration as…
Heterosexual	115275	STRAIGHT OR HETEROSEXUAL
Same Sex	1313	LESBIAN, GAY or HOMOSEXUAL
Bisexual	115276	BISEXUAL
Other	1005860	OTHER, PLEASE SPECIFY
Refused to Report	1005862	REFUSED TO REPORT
Unknown	1005861	UNKNOWN

- The above findings will map to **Patient Administration** only if a **Y** (positive) selection for the finding is made in Medcin. Sexual orientation entered in Medcin will always overwrite any information entered in Patient Administration.
- For **Other** findings, any free text entered in Medcin will populate in the corresponding **Other** field on the **Demographics** tab in **Patient Administration**.
- Updates to sexual orientation made in Medcin are auditable events and will be recorded on the Demographics Audit Report.

Note - Please note: Sexual orientation findings will only map to Patient Administration if you enter the information in Medcin. Sexual orientation selections entered in Patient Administration will not be recorded/mapped in the Medcin note.

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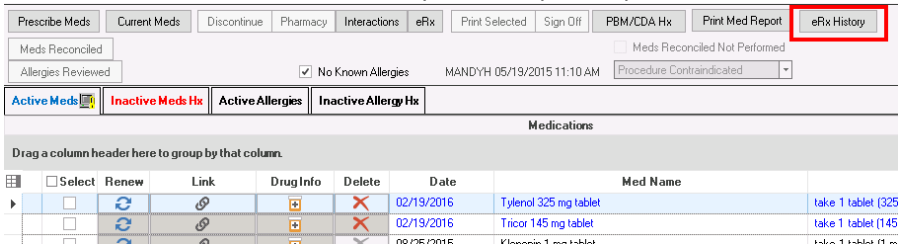
Medications

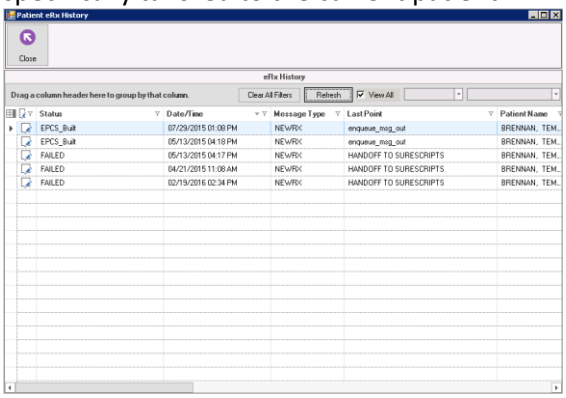
Medications Summary, New eRx History Button

Project #V810-92

An **eRx History** button has been added to the **Medications Summary** tab on the main **Medications** window that enables users to view all eRx history for the specific patient.



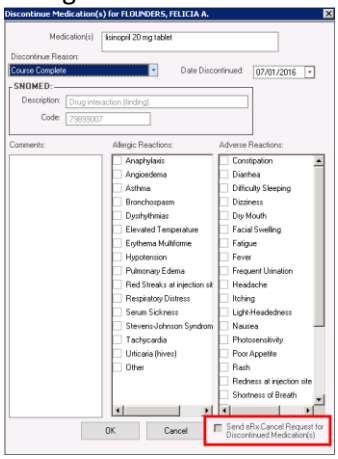
Click the eRx History button to display the **eRx History** window. This window displays the same information as the main **eRx History** screen accessible from the **Medications** node under **My Tasks** in Clinical Console, specifically tailored to the current patient.



New eRx Cancel Option for Discontinued Medications

Project #V810-97

A **Send eRx Cancel Request for Discontinued Medication** option has been added to the **Discontinue Medication** dialog box in **Medications** that enables users to send a cancel request to the original pharmacy.



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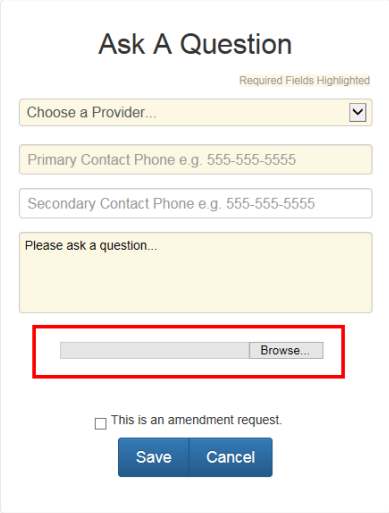
When this option is enabled (checked), the system will send a cancel request to the pharmacy the original medication was sent to via eRx stating that the prescription has been discontinued.

Patient Portal

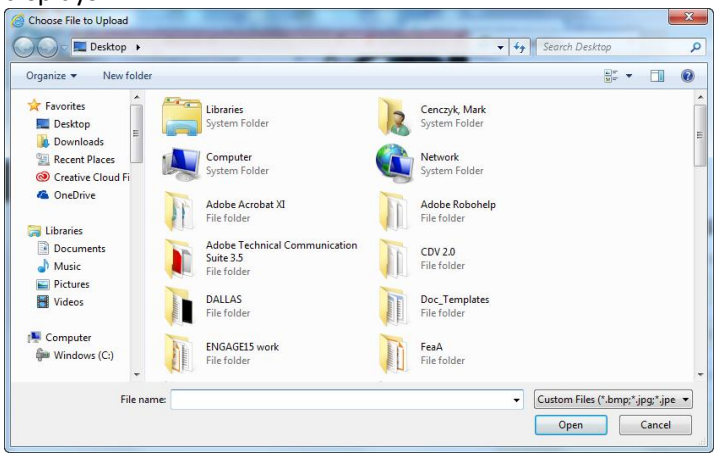
Ask A Question, New Attachment Function

Project #V810-190

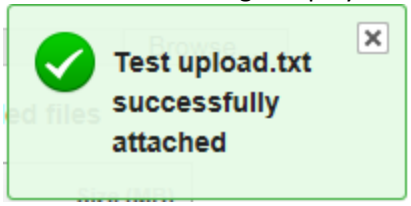
Portal users may now attach files when creating messages on the **Ask a Question** page in the **Patient Portal**.



When entering data on the **Ask a Question** page, portal users may click the **Browse** button to access an external drive and select a file to attach to the portal message being created. A **Choose File to Upload** dialog box displays.



Users may select the appropriate file, enter a **File name** for reference, and click **Open** to attach the file. A confirmation message displays when the file is uploaded successfully.



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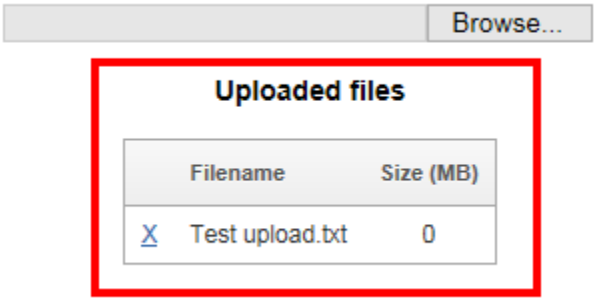
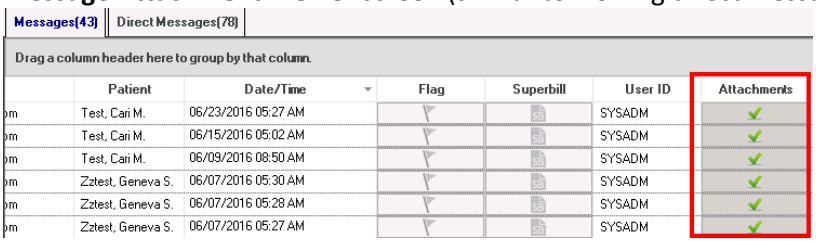
All files attached to a message will display in the **Uploaded files** list. Users may click the **X** link to remove any files before sending the message.



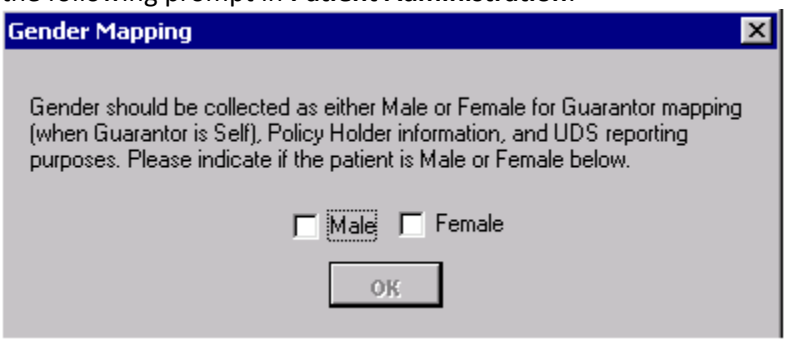
Attachments associated to portal messages will display in the **Messages** tab on the **Medical Messages** screen in Clinical Console. Users may view the attachments by clicking the appropriate **Attachments** button to launch the **Message Attachment Viewer** screen (similar to viewing direct message attachments).



Updates to Gender Mapping Prompt Text

Project #V810-211

The **UDS Gender Mapping** prompt on the **Demographics** screen in **Patient Portal** has been updated to mirror the following prompt in **Patient Administration**:



The Portal prompt title has also been renamed **Gender Mapping** (identical to the above image).

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Security Console

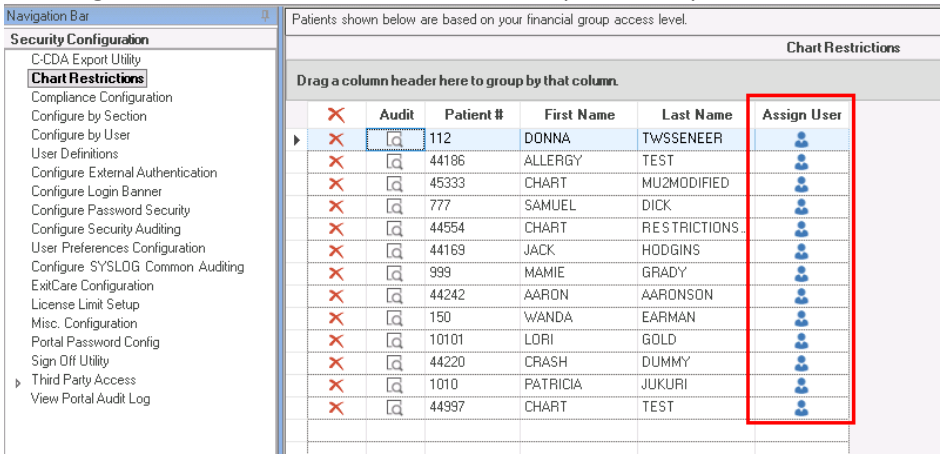
Chart Restrictions Updates

Project #V810-140

The **Chart Restrictions** screen in the **Security Console** has been updated to make it easier to assign/restrict users from accessing patient charts.

Assigning Users

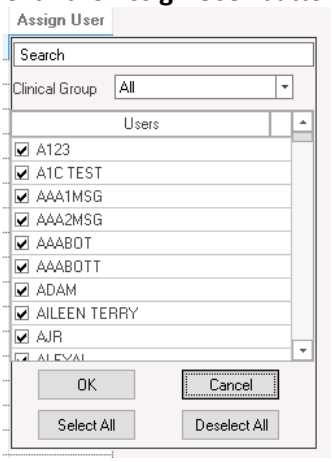
An **Assign User** column has been added that replaces the previous **Restrict User** column.



The **Assign User** column tracks those users that have access to specific patient charts (as opposed to tracking users that are prohibited from accessing specific patient charts).

To assign user access to a patient chart:

1. Click the **Assign User** button for the appropriate patient record row. A dialog box displays.



2. Select the appropriate **Clinical Group** from the drop-down list.
3. Select (check) the checkbox(es) of the user(s) to whom you want to grant access to the patient chart.
   - To locate a specific user, enter the user's name in the **Search** field.
   - Multiple users may be selected (checked). To select all users, click **Select All**. To deselect all users, click **Deselect All**.

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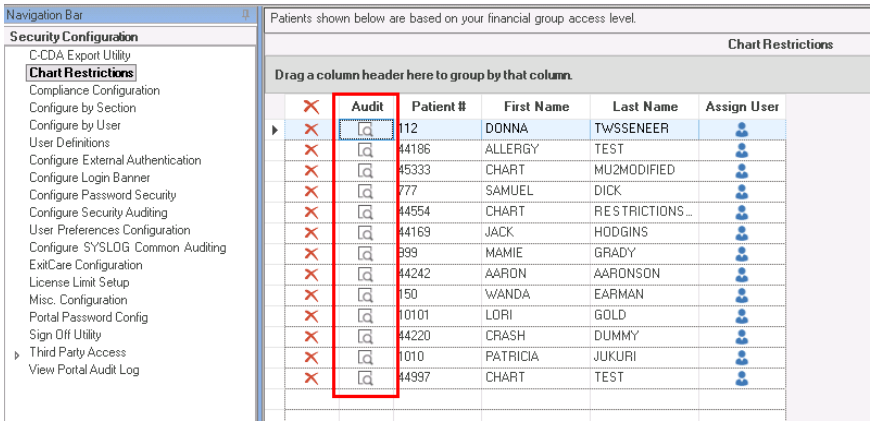
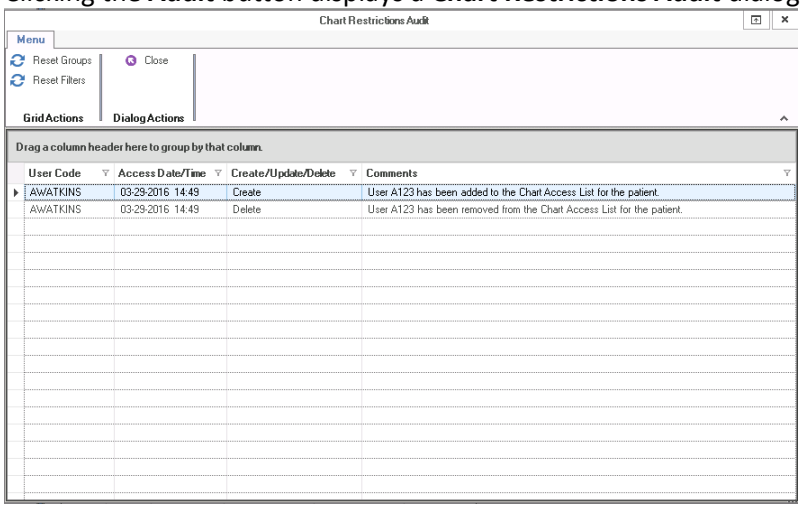
4. Click **OK** to grant access to the selected user(s).

Auditing User Access

An **Audit** column has been added to the **Chart Restrictions** screen to enable users to track changes to patient chart access.



Clicking the **Audit** button displays a **Chart Restrictions Audit** dialog box for the specific patient's chart access.



All actions pertaining to the granting or revoking of users' chart access will be recorded on the audit dialog box. The following information is available for viewing:

- **User Code** – Displays the user ID of the person granting access to the chart.
- **Access Date/Time** – Displays the date/time of the event.
- **Create/Update/Delete** – Displays the appropriate access action:
  - **Create** – access given
  - **Update** – access rights changed
  - **Delete** – access revoked
- **Comments** – Displays the appropriate user ID and access rights.

The table view may be modified as follows:

If this…	Do this…
You want to group the	Select a column header and drag it to the **"Drag a**

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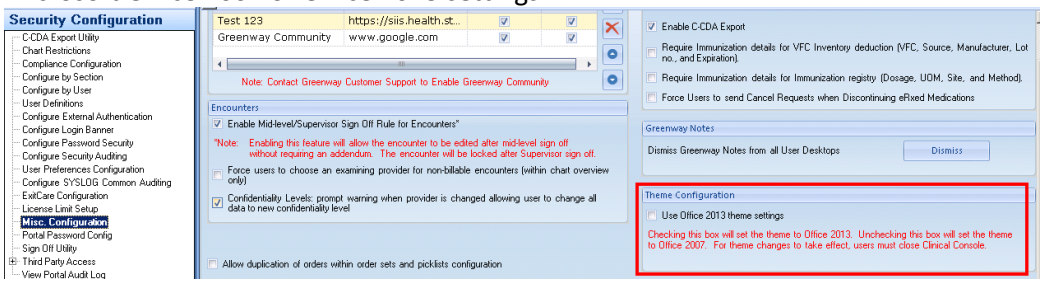
screen by column header.	**column header here to group by that column"** region immediately above the columns.
You want to filter columns.	Click in the column header and choose the filtering value from the drop-down list.
You want to reset the columns to their original filter or grouping.	Click **Reset 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.

Misc. Configuration, New Theme Configuration Option

Project #V810-293

A **Theme Configuration** section has been added to the **Misc. Configuration** screen in the **Security Console** to enable users to change the display appearance in **Clinical Console**, **Chart**, and all .NET screens to either Microsoft Office 2007 or Office 2013 settings.



Users may select (check) the **Use Office 2013 theme settings** checkbox to update the display to the new Office 2013 appearance. To revert to the Office 2007 settings, deselect (uncheck) the checkbox.

Note - Users must close Clinical Console for the appropriate change to take effect.

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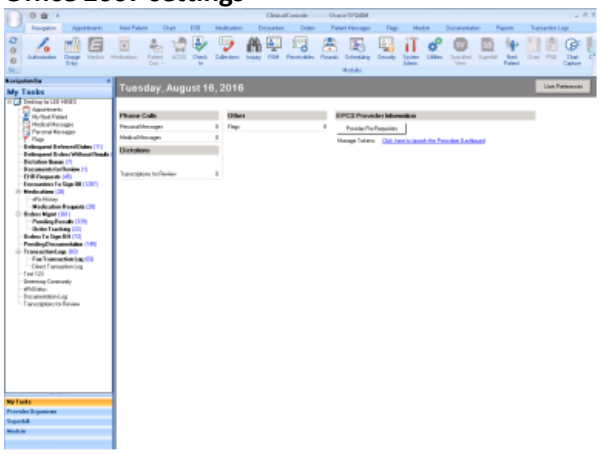
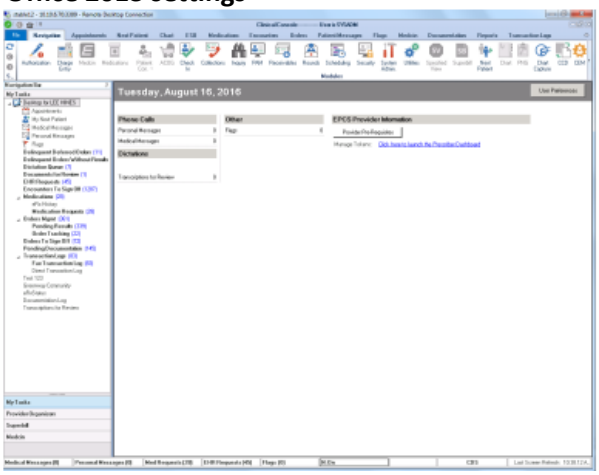
Office 2007 settings



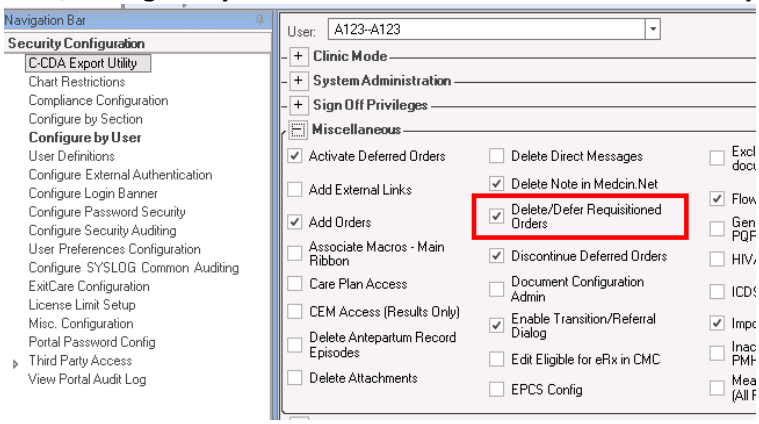
Office 2013 settings



New Delete/Defer Requisitioned Orders Option

Project #V810-289

A **Delete/Defer Requisitioned Orders** option has been added to the **Miscellaneous** section of the **Configure by User/ Configure by Section** screens in **Clinical Console Security**.



Selecting (checking) this option for a user(s) enables the user to delete or defer orders with associated lab requisitions.

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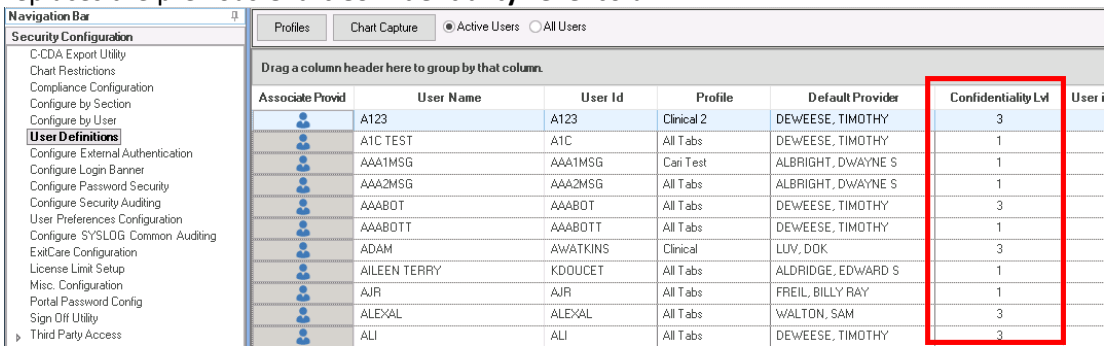
User Definitions, New Confidentiality Level Configuration Settings

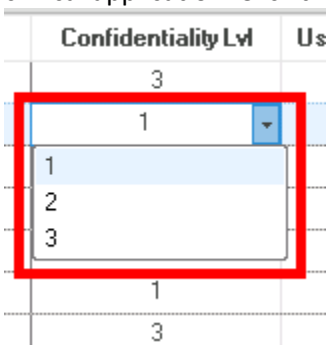
Project #V810-139

Confidentiality level settings for users have been updated.

A new **Confidentiality Level** column has been added to the **User Definitions** screen in the **Security Console** that replaces the previous **Chart Confidentiality Level** column.



The **Confidentiality Level** column enables users to assign a single confidentiality level to users throughout the clinical application. Click the drop-down list for the appropriate user to assign a confidentiality level.



The selected confidentiality level applies to the following screens in the system:

- **Encounter Detail**
- **Problem Detail**
- **Order Detail**
- **Code Selector – Advanced Add** tab
- **Chart – Encounters** tab
- **Medication** grid – **Confidentiality** column
- **Add Allergy** dialog box
- **Documents – Save** dialog box
- **View Attachments** dialog box
- **Specified View Configuration** – report confidentiality level

All relevant **Confidentiality Level** radio buttons on the above screens will be enabled according to the user's level as configured in **User Definitions**. For example, a user with Level 1 confidentiality will see the **Level 2** and

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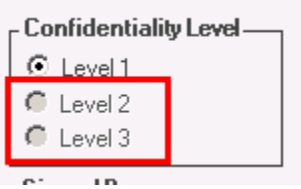
Level 3 radio buttons disabled on the appropriate screen.

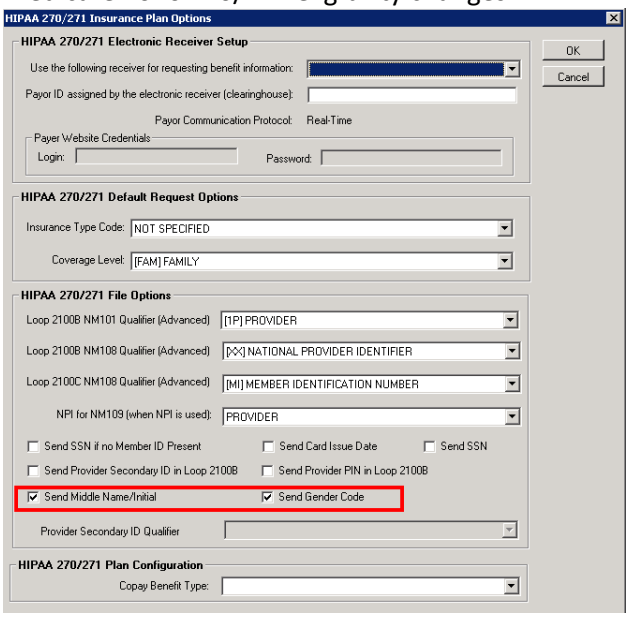


System Administration

Insurance Plans, New HIPAA 270/271 Options for Gender Code/Middle Initial

Project #V810-165

Send Middle Name/Initial and **Send Gender Code** checkboxes have been added to the **HIPAA 270/271 Insurance Plan Options** window under **Insurance Plans** in **System Administration** to accommodate for the Medicare 2016 270/271 eligibility changes.



These options are enabled (checked) by default. When enabled, any middle name/initial and gender code data present will be sent on Medicare eligibility requests. Users must deselect (uncheck) the option(s) to prevent transmission of the data.

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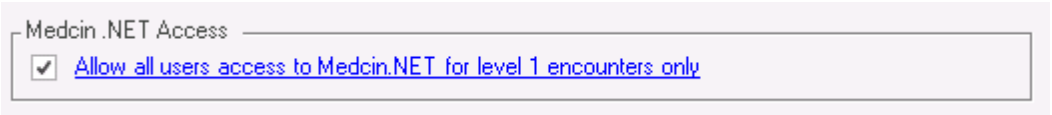
System Administration Console

Configure SuccessEHS, Medcin.NET Access Option Removed

Project #V810-191

As **Medcin.NET** is the standard version, the **Medcin.NET Access** checkbox in the **Chart** section on the **Configure SuccessEHS** screen in the **System Administration Console** has been removed.



Immunizations, Oral Site Option Added

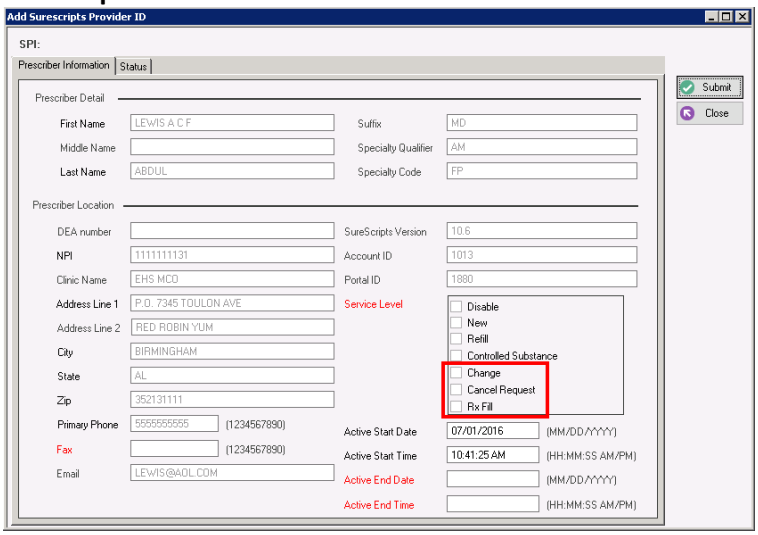
Project #V810-287

Oral has been added as a **Site** selection option for all **Immunization** add/edit screens in the **Starter Set Builder, Order Set Builder, Picklist Builder,** and all **Order Detail** screens.

Interface Utilities, New SPI Options for Medication Requests

Project #V810-210

Change, Cancel Request, and **RXFill** options have been added to the **Surescripts Provider ID** window on the **Surescripts SPI Administration** screen in **Interface Utilities** in the **System Administration Console**.



Selecting (checking) these options will register the provider with Surescripts for the specific transactions. If these options are not selected, the provider will not receive the corresponding message types in **Medication Requests**.

LOINC Codes Updated

Project #V810-189

The LOINC codes have been updated in the system to version 2.54.

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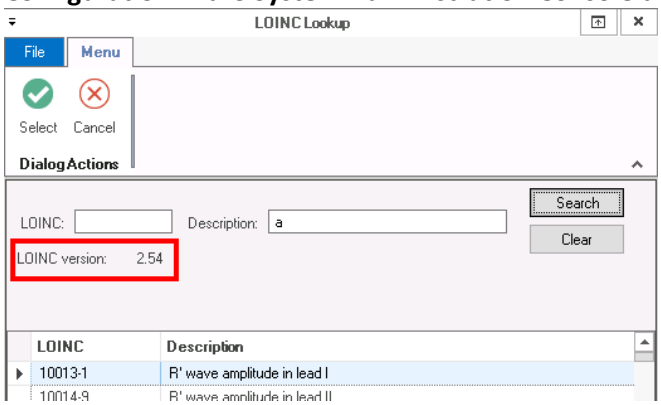
Starter Set Builder, LOINC Version Added

Project #V810-189

A **LOINC Version** field has been added to the **LOINC Lookup** dialog box in the **Starter Set Builder** under **Clinic Configuration** in the **System Administration Console** that displays the current version of LOINC codes.

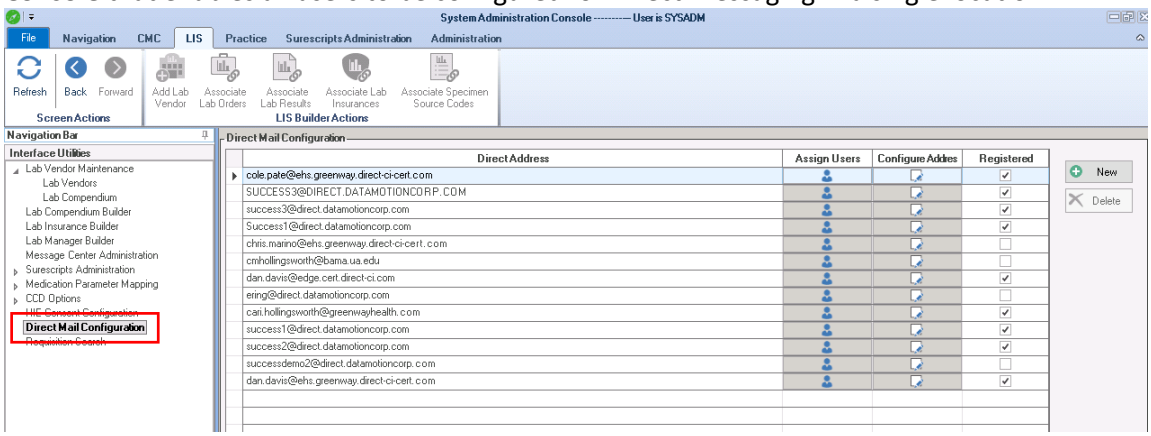


Direct Messaging Updates

Several changes have been made to the Direct Messaging functionality in this software release.

Direct Mail Configuration

A new **Direct Mail Configuration** screen has been added to **Interface Utilities** in the **System Administration Console** that enables all users to be configured for Direct Messaging in a single location.



This screen replaces the previous **Direct Mail Configuration** section in the **Security Console**. All Direct Messaging configuration activity resides in this new screen.

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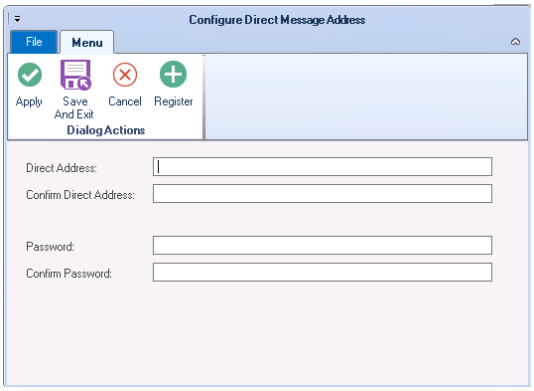
Configuring Direct Addresses (SYSADM Users Only)

Users with SYSADM privileges may add direct mail addresses to the system.

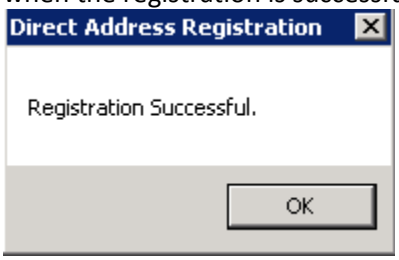
1. To add a new direct address, click the **New** button. A **Configure Direct Message Address** dialog box displays.



2. Enter the full email address provided by SuccessEHS (e.g. name@xyz.com) in the **Direct Address** field.

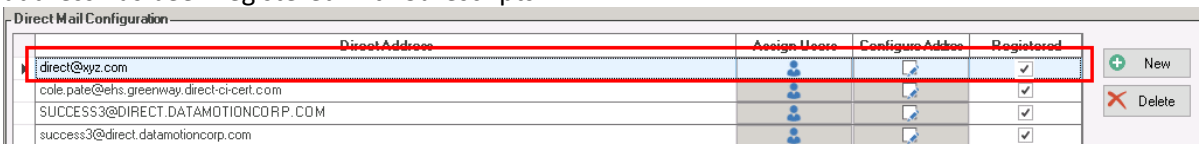
Note - Only addresses provided by SuccessEHS may be configured in this section. Addresses provided by other entities are not valid and will not be usable for sending direct messages.

3. Enter the name again in the **Confirm Direct Address** field.
4. Enter an appropriate **Password** and re-enter it in the **Confirm Password** field.
5. Click **Register** in the menu ribbon to register the address with Surescripts. A confirmation message displays when the registration is successful.



6. Click **Apply** to save your changes and keep the window open, or **Save and Exit** to save your changes and close the window.

   The address will be added to the main table. A checkmark will display in the **Registered** column if the address has been registered with Surescripts.



7. To edit the address information, click the **Configure Address** button to display the **Configure Direct Message Address** dialog box. Make the necessary modifications and click **Save and Exit**.

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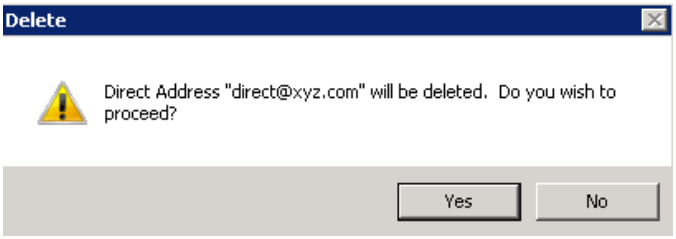
8. To delete a direct address, select the address in the table and click **Delete**. A confirmation message displays.

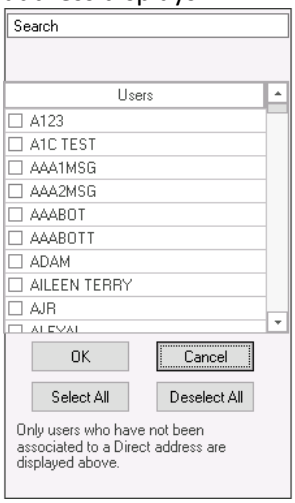


Click **Yes** to delete the address, or **No** to cancel deletion.

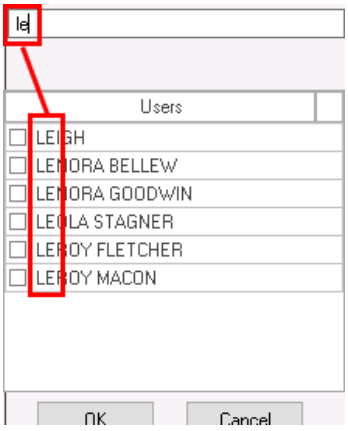
Assigning Users to Direct Addresses

To associate certain users to a direct address:

1. Click the **Assign Users** button for the appropriate address in the table. A list of users not assigned to a direct address displays.



2. Users may position their cursor in the **Search** field and begin typing the first few letters of the appropriate username. The **Users** list will filter to include only those names that match the entered search information:



Note - The Search function only searches for usernames that begin with the entered information. For example, in order to search for the username JOHN SMITH, the user would have to type JOH as opposed to SMI, since the username begins with JOH.

3. Select (check) the checkbox for each appropriate user to associate to the direct address.
   To select all records, click **Select All**. To deselect all records, click **Deselect All**.

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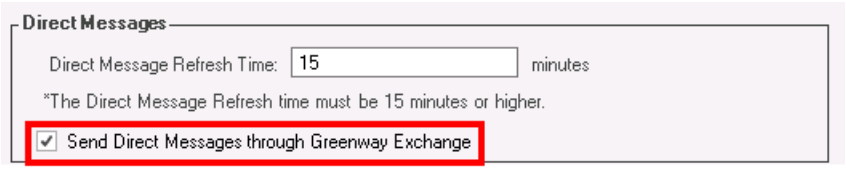
4. Click **OK** to save your changes.

Configuring Direct Messages Via Greenway Exchange (SYSADM Only)

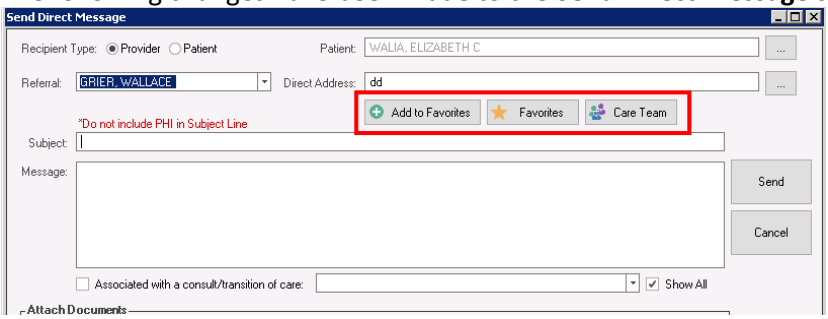
Users with SYSADM privileges may configure all direct messages to be routed through the Greenway Exchange portal.

A **Send Direct Messages through Greenway Exchange** option has been added to the **Direct Messages** section under **Misc. Configuration** in the **Security Console**. Users may enable (check) this checkbox to activate Greenway Exchange for all direct message traffic.

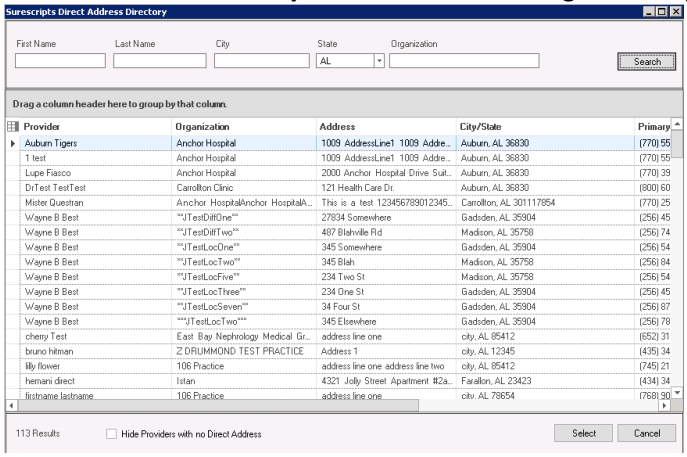


Direct Messages in Clinical Console

The following changes have been made to the **Send Direct Message** screen in Clinical Console.



- The **Referral** radio button in the **Recipient Type** section has been renamed to **Provider**.
- You may select a Surescripts direct address by clicking the ellipsis button to display the **Surescripts Direct Address Directory** window and searching for the appropriate address.



- **Favorites**
  - Clicking the **Add to Favorites** button for a provider/direct address combination will add that combination to the user's list of favorites for direct messaging.

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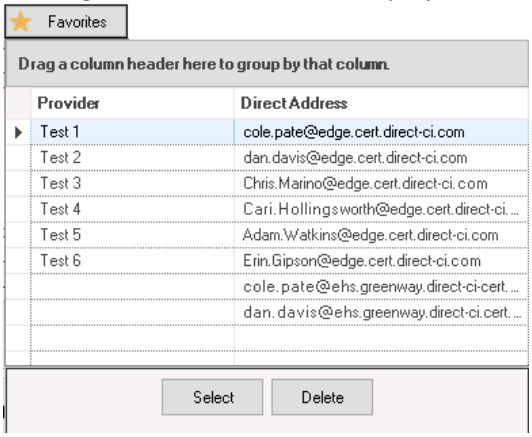
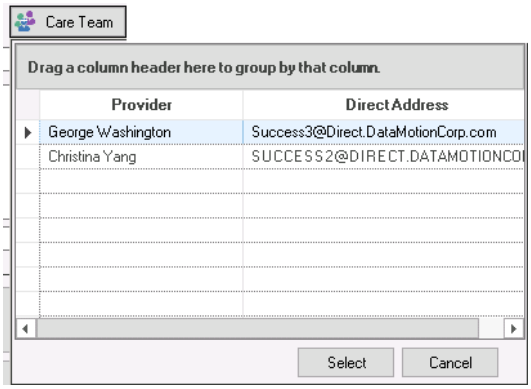
– Clicking the **Favorites** button displays a list of saved combinations for the user to select.

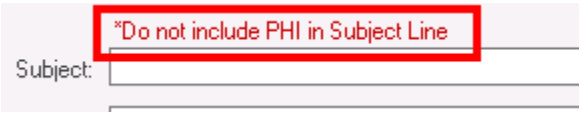


– **Care Team** – Clicking the **Care Team** button will display a list of any providers in the patient's Care Team with a direct address associated to them.



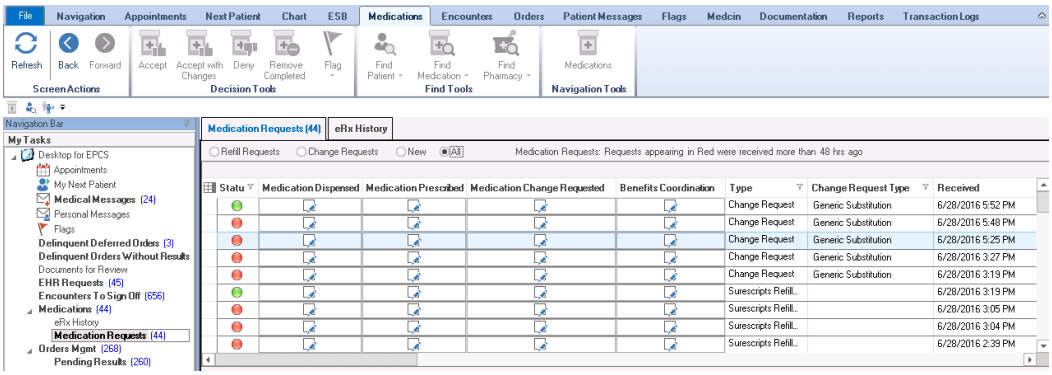
Users may select the appropriate provider to send the direct message to.

- A **Do not include PHI in Subject Line** indicator has been added to the Subject line to remind users that PHI is not to be transmitted.



New Change Request Functionality for Medications

Users are now able to manage Surescripts pharmacy requests to change prescribed medications on the **Medication Requests** screen in Clinical Console.



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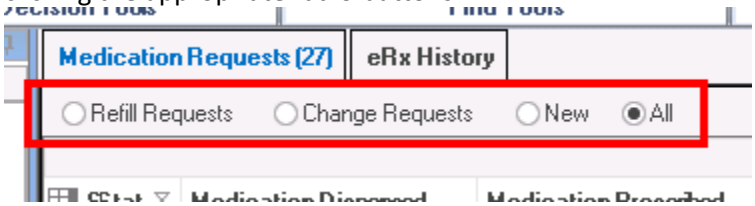
Filtering the Medication Requests View

The main **Medication Requests** grid may now be filtered to view standard refill requests and change requests by clicking the appropriate radio buttons.



- Clicking **Refill Requests** displays the current refill requests.
- Clicking **Change Requests** displays requests from Surescripts pharmacies to change the prescribed medication.
- Clicking **All** displays both refill and change requests.
- Clicking **New** displays those requests made within the last 24 hours.

All medication requests older than 48 hours will display in **red text**.

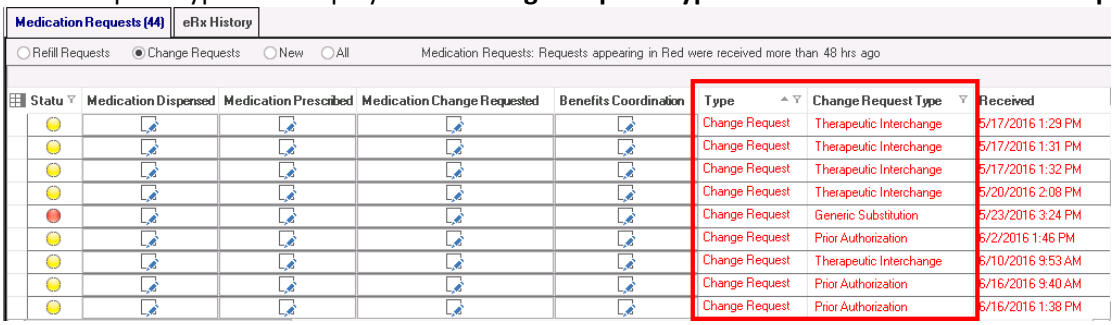
Understanding the Medication Change Request Workflow

1. **Pharmacy requests a change to the medication**

   When a user sends a new prescription via eRx to the pharmacy, the pharmacy may identify a need to make a change to the original prescription. In this case, the pharmacy responds with one of the following change request types:

   - **Therapeutic Interchange** – Used to change the original prescription to an alternative drug with fewer side effects, a lower copay, supply change, dose optimization, or script clarification.
   - **Generic Substitution** – Used to change the original prescription to a generic drug in cases where the generic is available although substitution is not allowed, a new generic drug has become available, or the brand-name drug is not covered by insurance.
   - **Prior Authorization** – Used to change to an alternative drug if needed where prior authorization was required for the original prescription (e.g., an EPCS prescription).

   These request types will display in the **Change Request Type** column on the **Medication Requests** grid.



2. **User receives the change request from the pharmacy**

   After the pharmacy sends the change request, the user may click the detail icon in the **Medication Prescribed** column to display the details of the original prescription.

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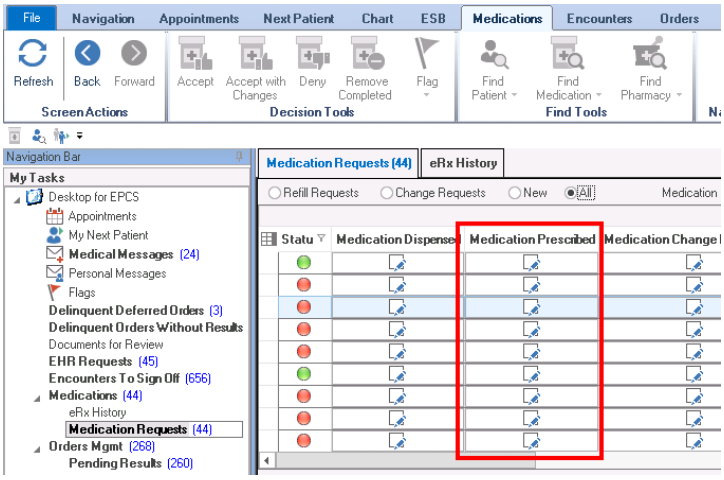
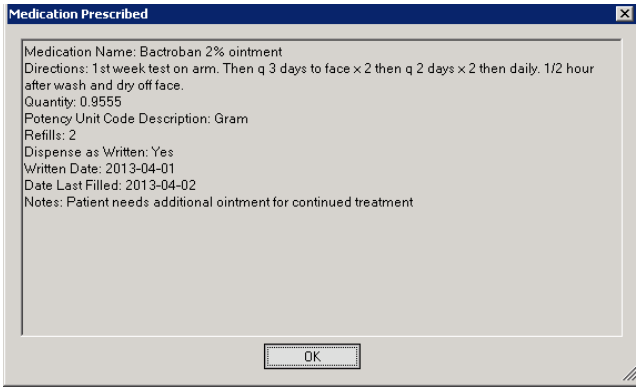
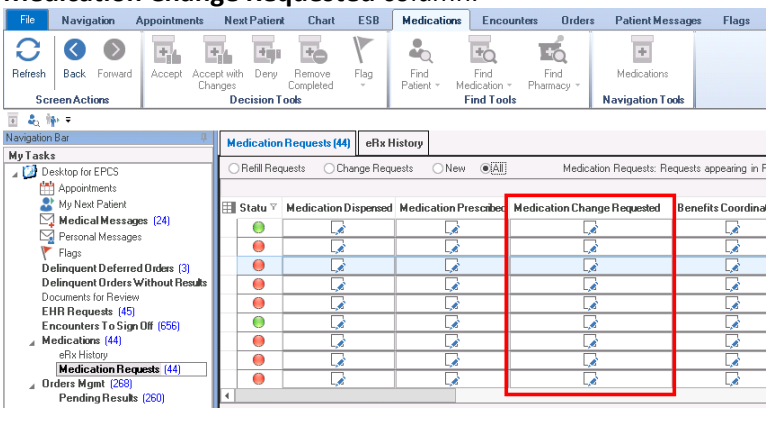




3. **User processes the change request**

   The pharmacy sends a list of alternative medications with the change request, which are viewable via the **Medication Change Requested** column.



- **Accepting a Change Request**
  - Users may click the detail icon in the **Medication Change Requested** column to display a **Med Requested** dialog box with a list of the possible medication changes the pharmacy has sent

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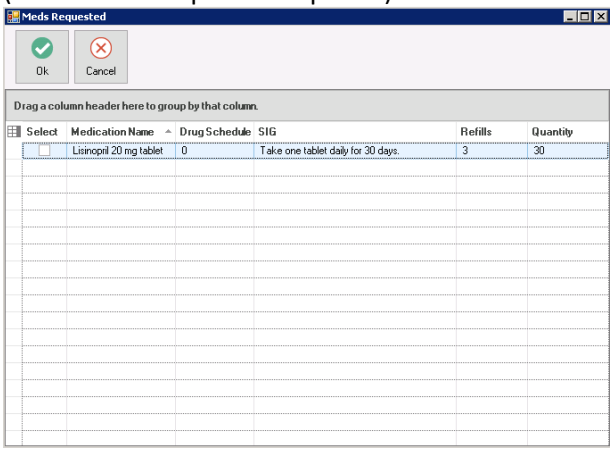
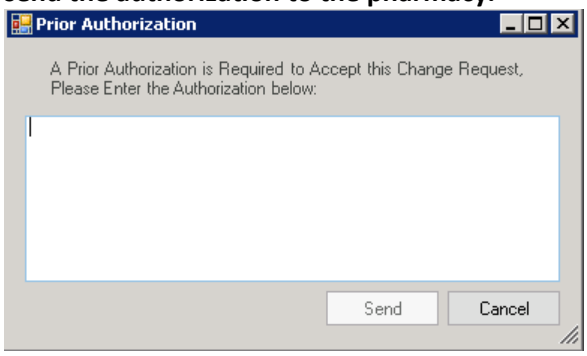
(maximum of 9 possible options).



- Users may select (check) the appropriate **Select** checkbox to select a medication option and click **OK**. The new medication will populate the selected medication details in the existing medication columns.
- Once the alternative medication is selected, the user may click **Accept** in the **Medications** menu ribbon to accept the change. Accepting the new prescription will replace the original prescription in the pharmacy with the change.

Note - Users may accept a change request for a Prior Authorization medication that was not sent via EPCS by clicking Accept without selecting a medication from the Meds Requested dialog box. Clicking Accept displays a Prior Authorization dialog box for the user to enter an authorization for the change request and click Send to send the authorization to the pharmacy.



- **Accepting a Change Request with Changes**
  - If the list of medications sent from the pharmacy is not acceptable, the user may click the **Accept with Changes** button in the **Medications** menu ribbon to display the **Prescribe Medications** screen

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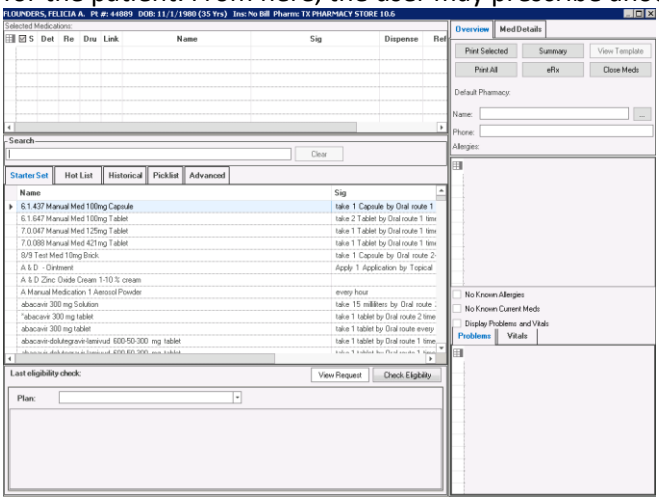
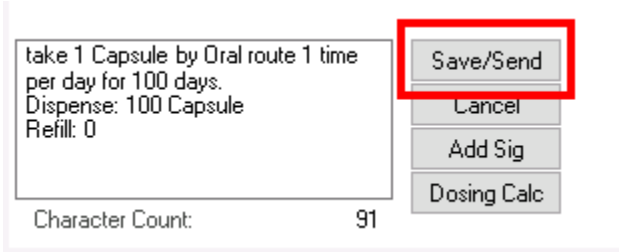
for the patient. From here, the user may prescribe another medication for the change request.

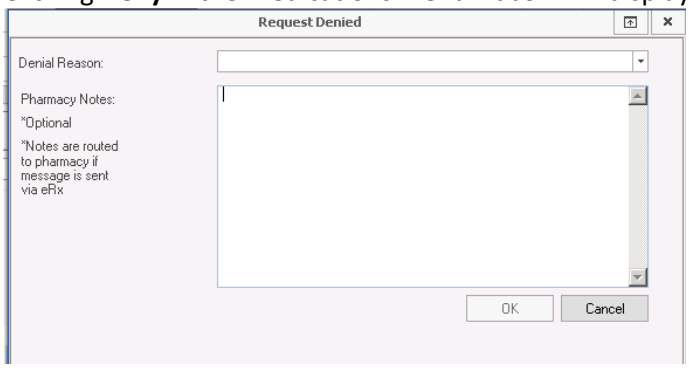


- Selecting the **Save/Send** button will add the medication to the patient's chart and send an **Approved with Changes** response with the new medication to the pharmacy.



Selecting **Save/Send** also discontinues the existing medication in the patient's chart linked to the Change request with a **Discontinued** reason of "**Change Request**."

- **Denying a Change Request**
  - Clicking **Deny** in the Medications menu ribbon will display the **Request Denied** window.



Users may select the appropriate **Denial Reason** from the drop-down list, enter any **Pharmacy Notes**, and click **OK** to send the denial to the pharmacy as per normal. The following denial reasons may be selected for change requests:

- Denied with New Rx to Follow
- Patient unknown to the prescriber
- Patient never under provider care
- Patient no longer under provider care
- Medication never prescribed for patient
- Patient should contact provider first

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- No attempt will be made to obtain Prior Authorization
- Change not appropriate
- Request already responded to by other means (e.g. phone or fax)
- Prescriber not associated with this practice or location

Note - Change requests for medications originally sent via EPCS may only be denied.

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