



CPS User Guide with EnterpriseRx® and Pharmaserv® Release 3.0.1

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1. User Guide Introduction




Intended Audience

This User Guide is intended for those individuals working with Clinical Programs Solution™ (CPS).

Typographic Conventions Used in This Document

The following typographic conventions are used in this document:

| Convention | Meaning |
|--------------------------------------|---|
| Boldface | <p>Boldface text is used when referring to the name of a window element, such as the following examples:</p> <ul style="list-style-type: none"> • Window names - Questionnaire window • Field names - Last Name field • Menu names - Code Type menu • Tab names - Clinical Programs tab • Button names - Save button |
| Cross Reference Link | <p>Blue Text indicates that this is a Cross Reference link to other areas of the chapter or areas in other chapters of the document. The link may also include the page number where the link will take you.</p> <p>Select the link by holding down the Ctrl button and selecting the link in order to go to the desired location.</p> |
| Note: or Notes: | <p>This is used to inform you of some key points or to add some information about the subject or task, such as the following:</p> <p>Note: Field Names preceded by an asterisk (*) are required fields.</p> |

| Convention | Meaning |
|--|--|
| <p>Important:</p>  | <p>This is used to alert you about some information that is necessary to successfully complete a task, such as the following:</p> <p>Important: For customers that leverage First Databank (FDB), when adding a GCN Data Filter, ensure that leading zeros <u>are not included</u> in the GCN(s) [example: correct GCN = 1234; incorrect GCN = 01234]. For customers leveraging Medi-Span, the leading zero <u>must be included</u> when adding a GPI Data Filter [example: correct GPI = 01234567890000; incorrect GPI = 1234567890000].</p> |
| <p>Caution:</p>  | <p>This is used to warn you about potential problems for a task you are performing, such as the following:</p> <p>Caution: An expiration date can be, at most, 999 days in the future. If you enter an expiration date beyond the 999 days maximum, an error will display and you will not be able to save your change.</p> |
| <p>Tip:</p>  | <p>This icon is used to alert you to information that may provide additional insight and/or options that you may want to know about, such as the following:</p> <p>Tip: For Self-Directed Programs, you'll be making your own decisions on what your filters include.</p> |

2. Introduction to Clinical Programs Solution™

McKesson Clinical Programs Solution™ (CPS) is a cloud based application that enables you to drive clinical interactions between your pharmacists and patients in order to provide your patients with better clinical outcomes. CPS is designed to be an integration platform which enables bidirectional communication between your Pharmacy Management system and third party Vendor solutions.

CPS also allows you to create and configure your own Self-Directed Programs to manage patient care, Alerts can be managed directly in your pharmacy workflow activities. For example, if you'd like to help patients quit smoking, you can use CPS to enroll patients, track progress, and remind pharmacists and other staff to check in with the patients and offering counseling on an on-going basis.

Note: Access points and window displays in this document may be different based on your Pharmacy Management System.

Key Features In Clinical Programs Solution

- ["Connect with Integrated Third Part Vendor Solutions"](#) on page 4
- ["Build Your Own Custom Programs"](#) on page 4
- ["Stay Abreast of Program Alerts During Workflow"](#) on page 5
- ["Take Action on Program Enrollments & Alerts Outside of Workflow"](#) on page 5
- ["Access a Comprehensive CPS Patient Profile"](#) on page 7

Connect with Integrated Third Part Vendor Solutions

CPS connects pharmacy staff to opportunities identified by integrated Vendor partners. CPS Vendor integrations not only centralize clinical opportunities for pharmacy staff but may also help to reduce duplicate data entry across platforms

Build Your Own Custom Programs

Build your own custom Self-Directed Programs that will interact directly with pharmacy staff. Building a Program is as simple as adding and activating the Program in **CPS Program Builder**, and configuring and enabling the Program in **CPS Program Admin**.

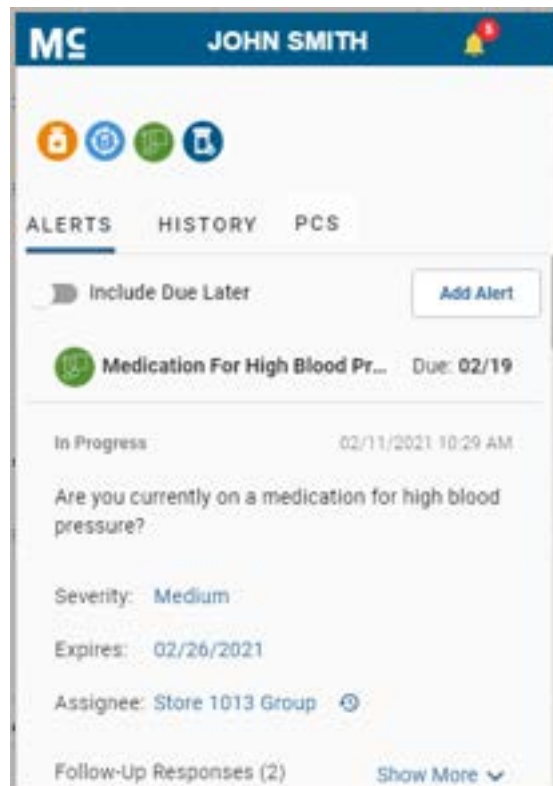


Set up Programs that will Alert your pharmacists to take actions such as:

- Enroll a patient into a diabetes management Program
- Provide counseling on the use of asthma inhalers
- Record the blood pressure of a patient with hypertension
- Gather patient feedback on medication side effects for specialty medication
- Advise patients 60 years and older to get the shingles vaccination

Stay Abreast of Program Alerts During Workflow

The **Clinical App** provides access to all active and historical Alerts for the patient in context, including Alerts that are triggered in-workflow during prescription processing. These Alerts may provide access to a questionnaire which facilitates documentation in a repeatable, consistent process, or may even provide a hyper-link to an integrated third party Vendor's portal. Additionally, the **Clinical App** allows pharmacy staff to send On Demand Messages to patients enrolled in Patient Communications Solution (PCS).



Take Action on Program Enrollments & Alerts Outside of Workflow

The **Task Queue** provides a list of all active Alerts available for patients so you can take action outside of workflow. The Alerts displayed in this queue can be prioritized, according to the parameters you apply, so that you can deal with the most important Alerts first.

The screenshot shows the McKesson Task Queue interface. At the top, there is a 'Patient Search' bar. Below it, a 'Filters' section contains dropdown menus for Program Name, Alert Name, Due Date, Assignee, Status, Severity, Expires Date, Alert Text, and Store #. The Store # is currently set to 1130. Below the filters is a 'Task Queue' header with a 'Next Available' icon and a 'Show Available Only' toggle. The main area is a table with the following columns: Program, Alert Name, Patient Name, DOB, Due, Assignee, Status, Expires, Store #, and Last Updated. The table contains six rows of alert data.

| Program | Alert Name | Patient Name | DOB | Due | Assignee | Status | Expires | Store # | Last Updated |
|--------------|--------------|--------------|------------|------------|---------------|-------------|------------|---------|------------------------|
| Adherence... | Adherence... | SMITH, JO... | 12/11/1942 | 02/09/2021 | - | Not Started | 02/16/2021 | 1130 | - |
| Asthma Co... | Asthma Co... | SMITH, JO... | 11/04/1980 | 02/16/2021 | - | In Progress | 02/23/2021 | 1130 | 02/03/2021 1:18 PM |
| Adverse R... | Adverse R... | SMITH, JAY | 12/01/1955 | 02/19/2021 | - | In Progress | 03/01/2021 | 1130 | 02/11/2021 9:31 AM |
| Adherence... | Adherence... | SMITH, JAY | 12/01/1955 | 02/19/2021 | - | In Progress | 02/26/2021 | 1130 | 02/11/2021 10:21 AM |
| Medicatio... | Medicatio... | SMITH, JO... | 01/01/1965 | 02/19/2021 | Store 1013... | In Progress | 02/26/2021 | 1130 | 02/11/2021 10:29 AM |
| Supplemen... | Supplemen... | SMITH, JO... | 01/01/1965 | 02/22/2021 | - | Not Started | 02/27/2021 | 1130 | - |

When the **Task Queue** is opened, the default view will display all Alerts that are past due, due now, or do not have a defined due date. To narrow down the amount of Alerts you can filter the queue by any of the following:

- Program Name
- Alert Name
- Due Date
- Assignee
- Status
- Severity
- Expires Date
- Alert Text
- Store #

Access a Comprehensive CPS Patient Profile

The **Patient Profile** gives you a comprehensive view of everything you are doing for a patient to improve their wellness. The **Patient Profile** provides access to the **Clinical App** where you can manage Alerts for the patient. Additionally, using the **Patient Profile**, you can view/edit values collected for the patient, as well as update Program enrollment for the patient.

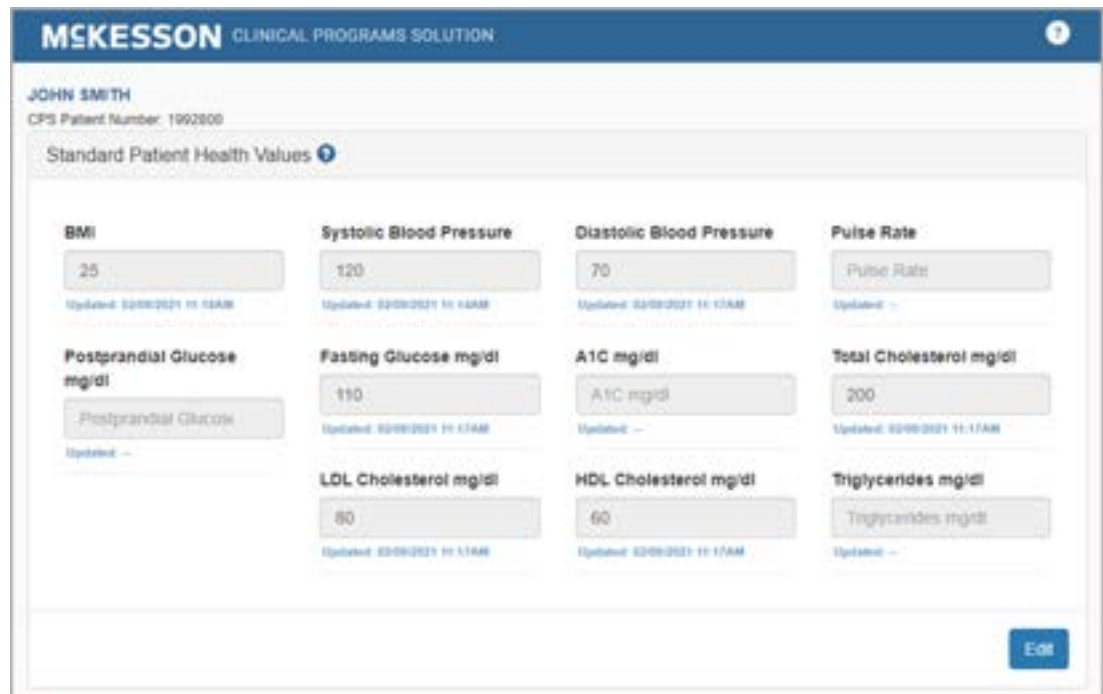
The screenshot displays the McKesson Patient Profile interface for a patient named John Smith. The interface is organized into several sections:

- Header:** McKesson logo, Patient Search bar, and navigation icons.
- Patient Information:** Name (JOHN SMITH), DOB (01/01/1965), Age (56 Years), Gender (Male), Phone (412) 552-4141, and Address (200 MAIN STR, POH, PA 15216).
- Notes:** A note stating "The patient started taking medication for high blood pressure." with a timestamp of 02/09/2021 11:17 AM.
- Health Values:** A grid of vital signs and lab results, including:
 - Shopper Reward Card: 0022112 (Updated: 02/09/2021 11:17 AM)
 - Delivery Preferences: Pick-up (Updated: 02/09/2021 11:17 AM)
 - Alternate Phone Number: (Updated: -)
 - Systolic Blood Pressure: 129 (Updated: 02/09/2021 11:17 AM)
 - Diastolic Blood Pressure: 79 (Updated: 02/09/2021 11:17 AM)
 - Pulse Rate: (Updated: -)
 - Fasting Glucose mg/dL: 110 (Updated: 02/09/2021 11:17 AM)
 - Total Cholesterol mg/dL: 200 (Updated: 02/09/2021 11:17 AM)
 - BMI: 25 (Updated: 02/09/2021 11:17 AM)
 - A1C mg/dL: (Updated: -)
 - HDL Cholesterol mg/dL: 60 (Updated: 02/09/2021 11:17 AM)
 - LDL Cholesterol mg/dL: 90 (Updated: 02/09/2021 11:17 AM)
- Alerts:** A section titled "ALERTS HISTORY" with a sub-section for "Include Due Later" and an "Add Alert" button. An active alert is shown for "Medication For High Blood P..." due on 02/05/2021. The alert details include:
 - Severity: Medium
 - Expires: 02/12/2021
 - Assigned: Store 1012 Group
 - Follow-Up Responses (1): A custom response with the text "Please finish questionnaire" and a due date of 02/05/2021.
- Patient Health Values Table:** A table with columns for Program, Field Name, Field Value, Received Date, and Updated By. The data is as follows:

| Program | Field Name | Field Value | Received Date | Updated By |
|---------|--------------------------|--|--------------------|------------|
| | Patient Notes | The patient started taking medication for high blood pressure. | 02/09/2021 11:21AM | Admin |
| | BMI | 25 | 02/09/2021 11:18AM | Admin |
| | Total Cholesterol mg/dL | 200 | 02/09/2021 11:17AM | Admin |
| | Fasting Glucose mg/dL | 110 | 02/09/2021 11:17AM | Admin |
| | Diastolic Blood Pressure | 79 | 02/09/2021 11:17AM | Admin |

If using EnterpriseRx, use the **Clinical Programs** tab to view and act on patient information such as:

- The Standard Patient Health Values
- Program Enrollments
- Program Alerts



Note: If using Pharmserv, select the CPS patient vertical toolbar button in Pharmacy Maintenance to access this information.

3. Building Clinical Programs

The building and configuration of a Self-Directed Program is highly customizable. Depending on your needs, you may choose not to use all of the fields and options available to you. The steps below outline an example of how a Program can be built.

Note: Only Self-Directed Programs need to be built in **Clinical Program Builder**. Vendor Programs are built by McKesson.

Tasks in Building a Self-Directed Clinical Program

- ["Getting Started with Program Builder" on page 10](#)
 - ["Building a Program" on page 10](#)
- ["Selecting a Program Logo & Icon" on page 10](#)
 - ["Adding a Program Logo" on page 11](#)
 - ["Adding a Program Icon" on page 11](#)
- ["Naming the Program & Entering a Program Description" on page 12](#)
- ["Choosing a Program Enrollment Type" on page 13](#)
- ["Expiration Setting for Patient Enrollment" on page 14](#)
- ["Building Questionnaires" on page 15](#)
 - ["Questionnaire Components" on page 16](#)
 - ["Form Component Customization Example Steps" on page 20](#)
- ["Entering Program Codes" on page 23](#)
 - ["Program Codes Example #1" on page 23](#)
 - ["Program Codes Example #2" on page 24](#)
 - ["Entering Program Codes" on page 24](#)
- ["Modifying Questionnaires" on page 28](#)
- ["Saving a New Questionnaire from an Existing Questionnaire" on page 29](#)
- ["Building Program Alerts" on page 32](#)
- ["Saving the Program" on page 34](#)

Getting Started with Program Builder

Building a Program

Navigate to **CPS Program Builder**.

If using EnterpriseRx, navigate to the builder from the menu bar, select **Administration > Clinical Rx Programs > Clinical Programs Solution > CPS Program Builder**.

Once **Clinical Programs** list is displayed, select the **Add Program** button to open the **Clinical Program Builder** window.

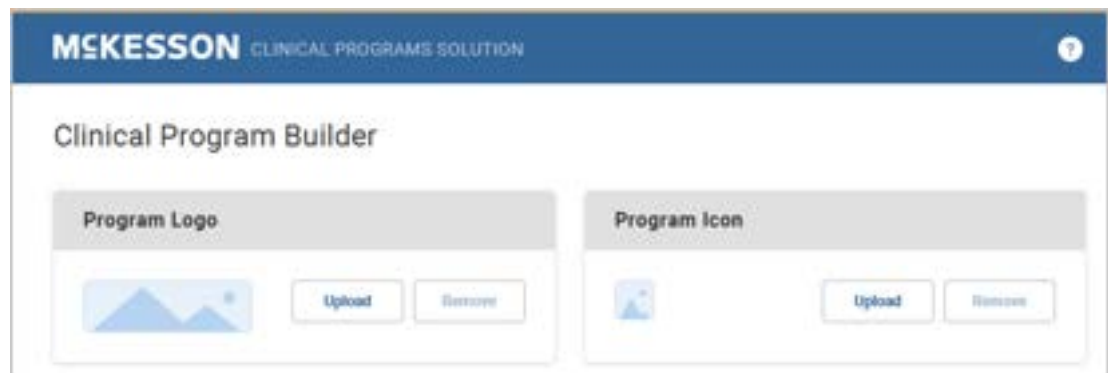


Notes:

- There are multiple areas within the **Clinical Program Builder** window that allow the user to create a Program that is tailored to their specific needs. Use the scroll bar in the window to move between areas. Each of these areas will be described individually.
- Field names preceded by an asterisk (*) are required fields.

Selecting a Program Logo & Icon

Program logos and icons are not required; however adding images will improve the visibility of the Program in the Pharmacy Management System.

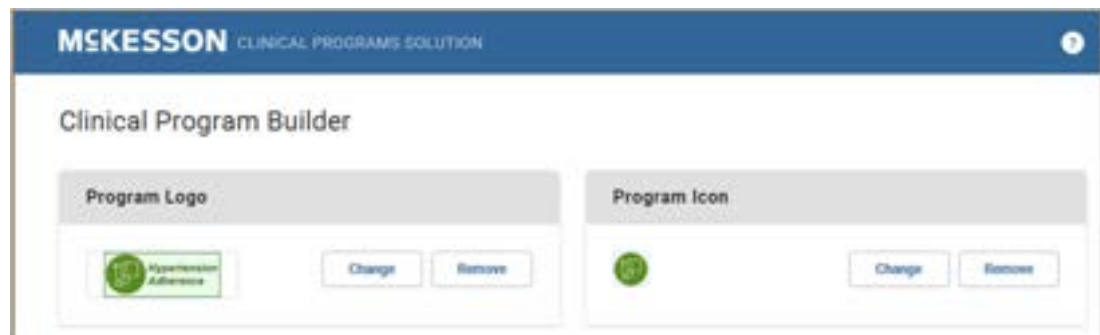


Adding a Program Logo

Select the **Upload** button and follow the prompts to select the image file from the local hard drive. This logo will display at various places in the Pharmacy Management platform, such as the **Patient Profile**, and allow users to easily identify the Program. The Program logo image will be 250 pixels wide x 75 pixels high and the file format can be .gif, .png or .jpg.

Adding a Program Icon

Select the **Upload** button and follow the prompts to select the image file from the local hard drive. This icon will display in various places in the Pharmacy Management platform, including the **Clinical App**, and allow users to easily identify the Program. The Program icon will display at 32 pixels wide x 32 pixels high and the file format can be in .gif, .png or .jpg.



Use the **Change** button to reselect a different image file. Use the **Remove** button to remove the logo or icon.

Naming the Program & Entering a Program Description

The screenshot displays the 'Program Information' form in the McKesson Clinical Programs Solution. The form is divided into several sections: 'PROGRAM NAME*' with a text input field containing 'Enter a Program Name', a red circle '1' highlighting the field, and a '60/60' character limit indicator; 'PROGRAM DESCRIPTION' with a text area containing 'Enter Program Description', a red circle '2' highlighting the area, and a '600/600' character limit indicator; 'ENROLLMENT TYPE' with a dropdown menu showing 'Patient Enrollment' and a 'Check-in Program' checkbox; and 'ASSOCIATE QUESTIONNAIRE' with a dropdown menu showing 'Select a Questionnaire'. At the bottom right, there are 'Previous' and 'Create New' buttons.

- 1) **To Name the Program:** Enter a Program name into the **Program Name** text field. This field is limited to 60 alphanumeric characters and no two Programs can be saved with the same name.
- 2) **To Enter a Program Description:** Enter the Program description into the text box. This field is limited to 600 characters. The Program description is not required; however, this text describes the purpose of the Program. The description of the Program will display in the **Clinical Program Builder**, **Clinical Program Admin**, the CPS **Patient Profile**, and the questionnaire, if applicable.

Choosing a Program Enrollment Type

There are 2 Program Enrollment Types:

- An **Enrollment Type of Patient Enrollment** will require users to ask the patient if they would like to enroll in the Program.
- An **Enrollment Type of No Enrollment** will not require users to ask the patient for his/her approval to enroll in a Program.

The screenshot displays the 'Clinical Program Builder' interface. At the top, it says 'MCKESSON CLINICAL PROGRAMS SOLUTION'. Below this, there are two sections: 'Program Logo' and 'Program Icon', each with a 'Change' and 'Remove' button. The 'Program Logo' shows a green circle with 'Hypertension Adherence'. The 'Program Icon' shows a green circle with a white cross. Below these is the 'Program Information' section. It includes a 'PROGRAM NAME*' field with 'Hypertension Adherence Program' and a 'PROGRAM DESCRIPTION' field with a text area containing information about hypertension. To the right, there is an 'ENROLLMENT TYPE' dropdown menu with 'Patient Enrollment' selected and 'No Enrollment' as an option. Below that is an 'EXPIRATION SETTING' field with the value '7'. At the bottom right, there is an 'ASSOCIATE QUESTIONNAIRE*' dropdown menu.

To choose an **Enrollment Type**: use the **Enrollment Type** drop-down menu to choose **Patient Enrollment** or **No Enrollment**.

Note: You might choose **Patient Enrollment** when you want to indicate a patient is associated with a particular Program. Enrollment Programs allow for patient data to be collected on an ongoing basis, over a period of time. For example, you might want to identify and provide ongoing counseling for patients with diabetes.

When **Patient Enrollment** is selected in the **Enrollment Type** drop-down, the **Check-In Program** checkbox, **Expiration Setting** field and the **Associate Questionnaire** drop-down will display.

Note: The **Check-In Program** checkbox is only available for selection if you have the CPS Premium subscription. If you do not have the CPS Premium subscription, the checkbox will be disabled. Please contact your Account Executive for more information on the Check-In Program feature.

Expiration Setting for Patient Enrollment

The **Expiration Setting** text box allows you to set the number of days that the enrollment Alert will continue to display in the **Clinical App** and **Task Queue** before it expires. The range is 1 to 999. The system default for this field is 7 days. To override this default setting, enter a new **Expiration Setting** value.

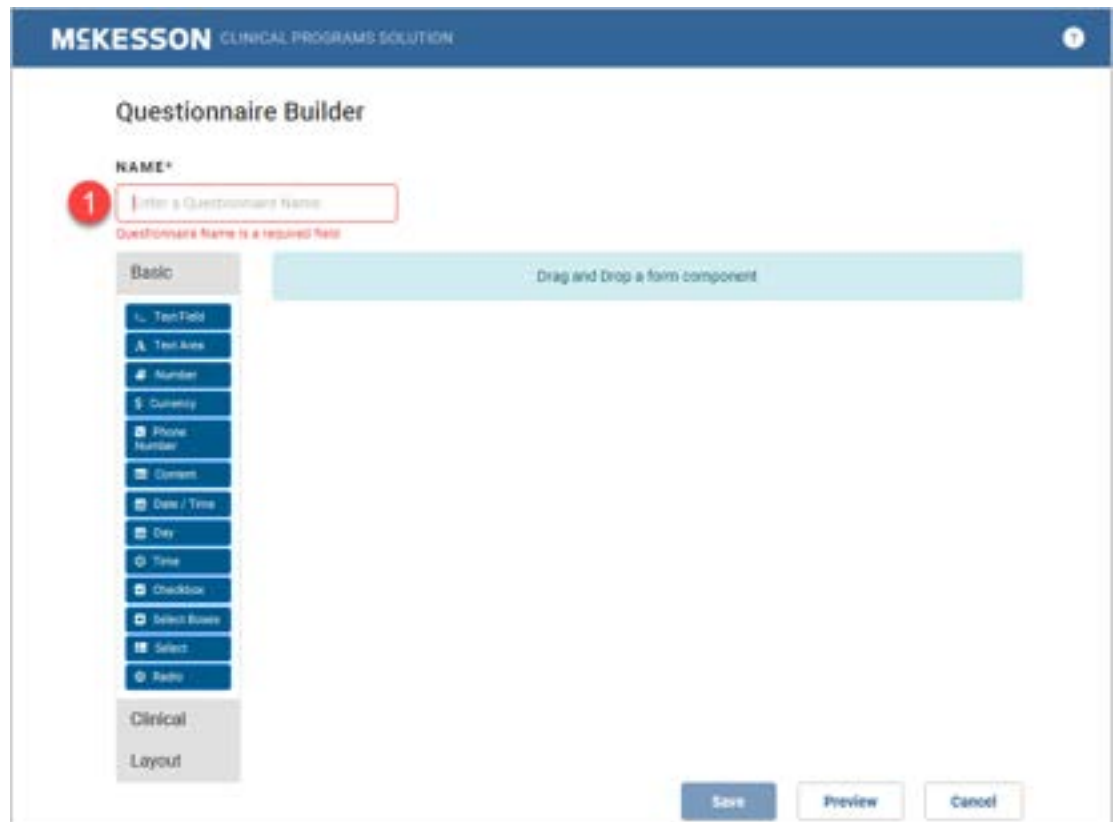
The screenshot displays the 'Clinical Program Builder' interface. At the top, there is a header with the 'McKESSON CLINICAL PROGRAMS SOLUTION' logo and a help icon. Below the header, the page is divided into several sections:

- Program Logo:** Contains a logo for 'Hypertension Adherence' with 'Change' and 'Remove' buttons.
- Program Icon:** Contains a green circular icon with 'Change' and 'Remove' buttons.
- Program Information:** This section contains several fields:
 - PROGRAM NAME*:** A text input field containing 'Hypertension Adherence Program'.
 - ENROLLMENT TYPE:** A dropdown menu currently set to 'Patient Enrollment'.
 - PROGRAM DESCRIPTION:** A text area containing the text: 'Hypertension is another name for high blood pressure. It can lead to severe health complications and increase the risk of heart disease, stroke, and sometimes death. Despite having good medication, the best control depends on patient's adherence.' A character count '35/60' is visible to the right of the text area.
 - Check-in Program:** A checkbox that is currently checked.
 - EXPIRATION SETTING:** A text input field containing the number '7'. This field is highlighted with a red border in the image.
 - ASSOCIATE QUESTIONNAIRE*:** A partially visible text input field at the bottom.

Building Questionnaires

The **Questionnaire Builder** allows for the customization of a questionnaire, which can be attached to any Self Directed Program or Program Alert. Select a component from Basic, Clinical and Layout lists on the left, then drag and drop it to the right. Each component can be customized, one at a time after it is added.

Please refer to "[Questionnaire Components](#)" on page 215 in the Appendix for a complete list of components.



1) To begin enter a questionnaire **Name**.

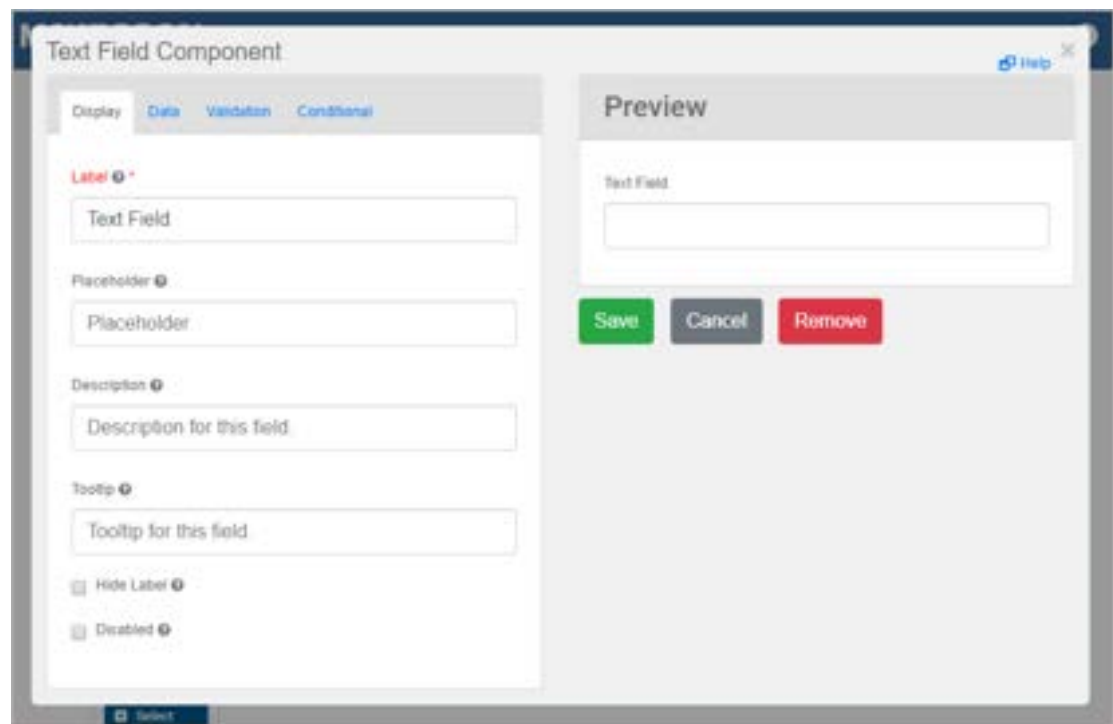
Questionnaire Components

The **Questionnaire Builder** consists of several form components you can choose to use to build your questionnaire. The example below shows the options for adding a **Text Field** component. Customization of the **Text Field** component is broken down into four tabs.

Notes:

- The amount of tabs and the tab types vary depending on component.
- The **Conditional** tab is only available if you have the CPS Premium subscription.

Display Tab



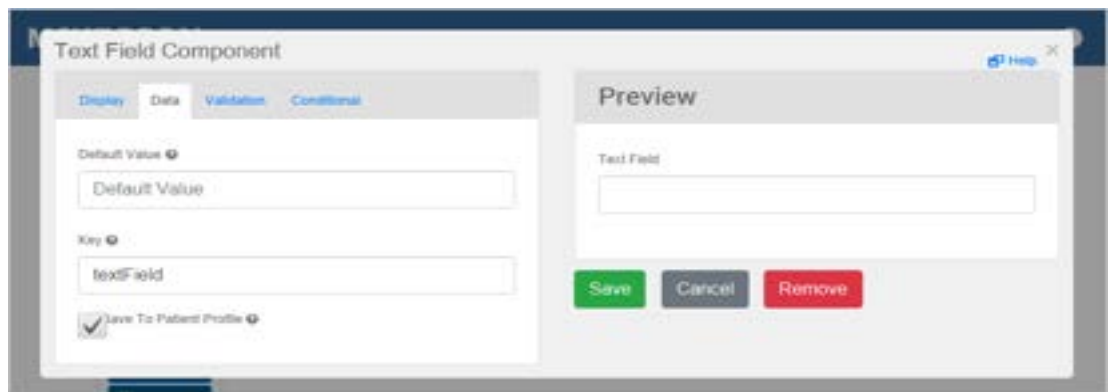
The following is a description of the fields on the **Display** tab for the **Text Field** component:

| Display Tab | |
|--------------------|--|
| Label | The label that will appear above the Text Field on the questionnaire. |
| Placeholder | Placeholder text is temporary text that will appear in the Text Field before there is user interaction. |
| Description | Description text that will appear below the Text Field on the questionnaire. |

Display Tab

| | |
|-------------------|---|
| Tooltip | A tooltip that will appear on the right side of the Label on the questionnaire. |
| Hide Label | A check box to hide the label for the Text Field from displaying on the questionnaire, but not when it's rendered. |
| Disabled | A check box to allow the Text Field to be disabled. |

Data Tab

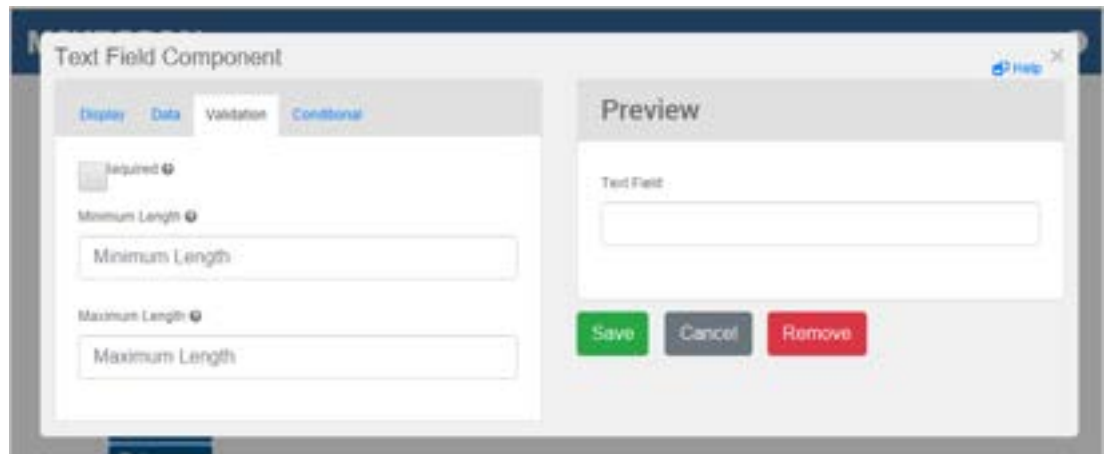


The following is a description of the fields on the **Data** tab for the **Text Field** component:

Data Tab

| | |
|--------------------------------|--|
| Default Value | A preset value for the Text Field that will show to the user before there is interaction on the questionnaire. Having a default value will override the placeholder text. |
| Key | The Key value is used to identify this field when reporting on questionnaire values. The Key must be unique within the Program, you cannot use the same Key for other components. If no Key is entered into the field a Key will be generated. |
| Save to Patient Profile | A check box to allow the Text Field value to be saved to the patient profile. |

Validation Tab



The following is a description of the fields on the **Validation** tab for the **Text Field** component:

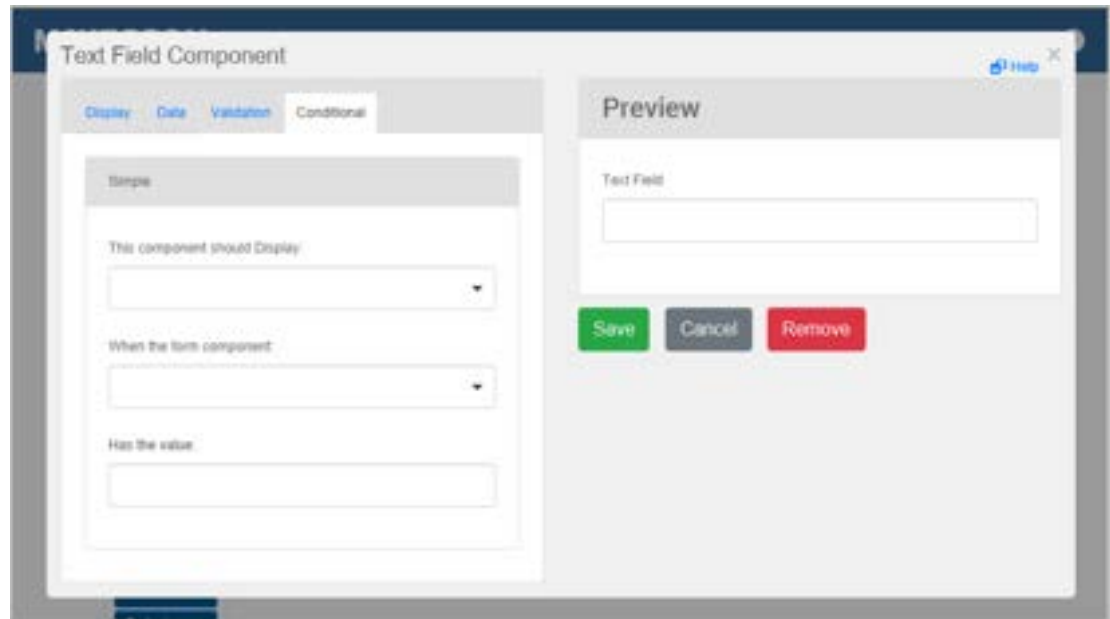
| Validation Tab | |
|-----------------------|---|
| Required | A check box to require the Text Field to be filled in before the questionnaire is submitted. |
| Minimum Length | The minimum length of characters that the Text Field must meet. |
| Maximum Length | The maximum length of characters that the Text Field must meet. |

Conditional Tab



The **Conditional** tab is only available if you have the CPS Premium subscription.

The options on this tab allow you to set up one or more conditions for the component. Setting up these conditions allow you to further customize a questionnaire. For example, if “Other” is selected on a particular radio button component then a text field is presented next to the user completing the questionnaire. If “Other” is not selected the text field will not display.

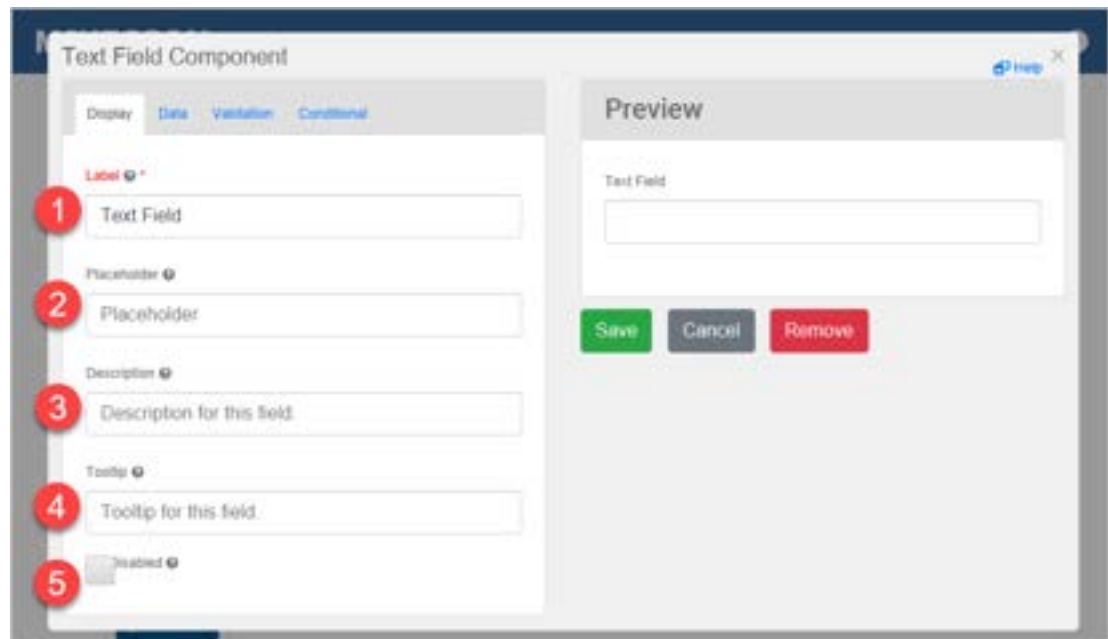


The following is a description of the fields on the **Conditional** tab for the **Text Field** component:

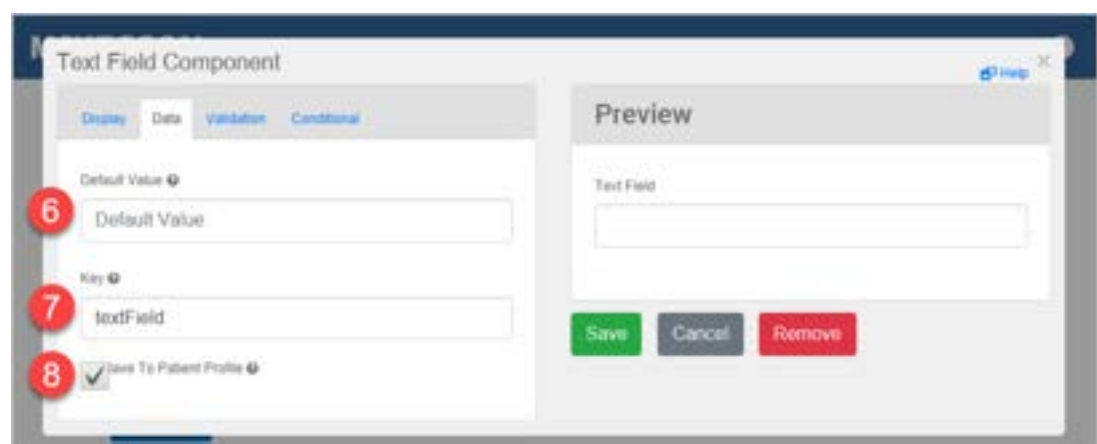
| Conditional Tab | |
|---------------------------------------|---|
| This component should Display: | Choose True or False to display this component within the questionnaire based on the field values below. |
| When the form component: | Select an existing form component of your questionnaire that will be used as a reference for the condition. |
| Has the value: | Define the value captured in the questionnaire for the form component selected above to complete the conditional statement. |

Form Component Customization Example Steps

The following describes the steps for creating a **Text Field** component.



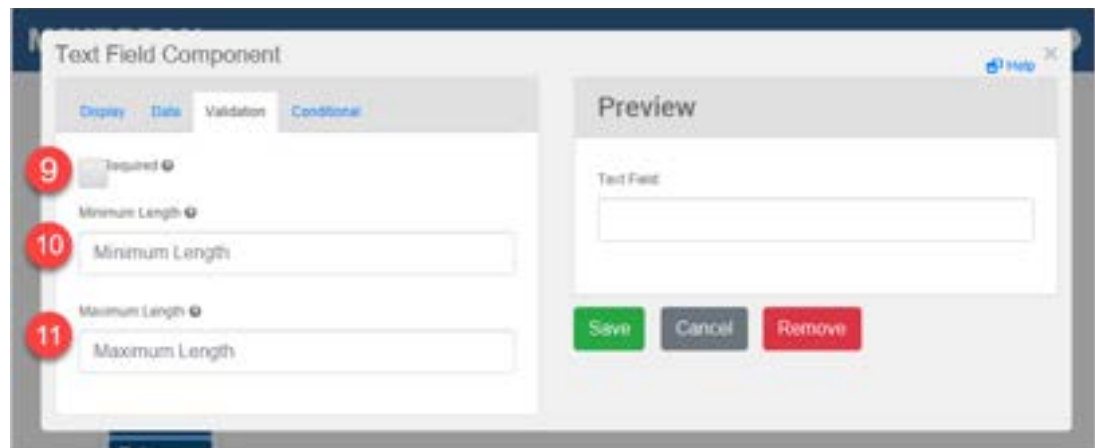
- 1) Type in a **Label** for the **Text Field**.
- 2) Enter placeholder text which is temporary text that will appear in the **Text Field** before user interaction.
- 3) Enter a description for the field that will appear below the **Text Field**.
- 4) Add a tooltip for the **Text Field** that will appear on the right side of the **Label**.
- 5) Use the **Disabled** check box to make the **Text Field** disabled.



- 6) Enter a pre-established **Default Value** for the **Text Field** that will appear before there is user interaction on the questionnaire. Having a default value will override placeholder text entered in step 2 above.
- 7) Enter a value in the **Key** field. The **Key** must be unique within the Program.

Note: The **Key** field allows the user to assign a value to the field. The value could refer to something like a database key value for the Program. Although this field is not required, the system will auto-generate a key value if no value is entered.

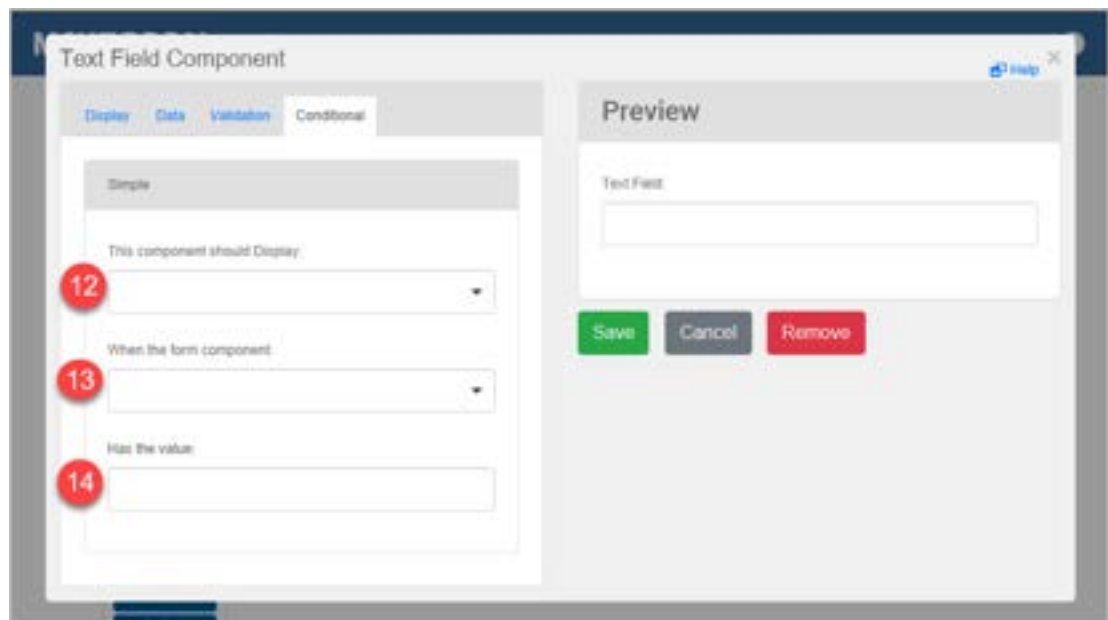
8) Select whether or not to save the **Text Field** value to the patient profile.



9) Select whether or not to make the **Text Field** required.

10) Enter the minimum length requirement the **Text Field** must meet.

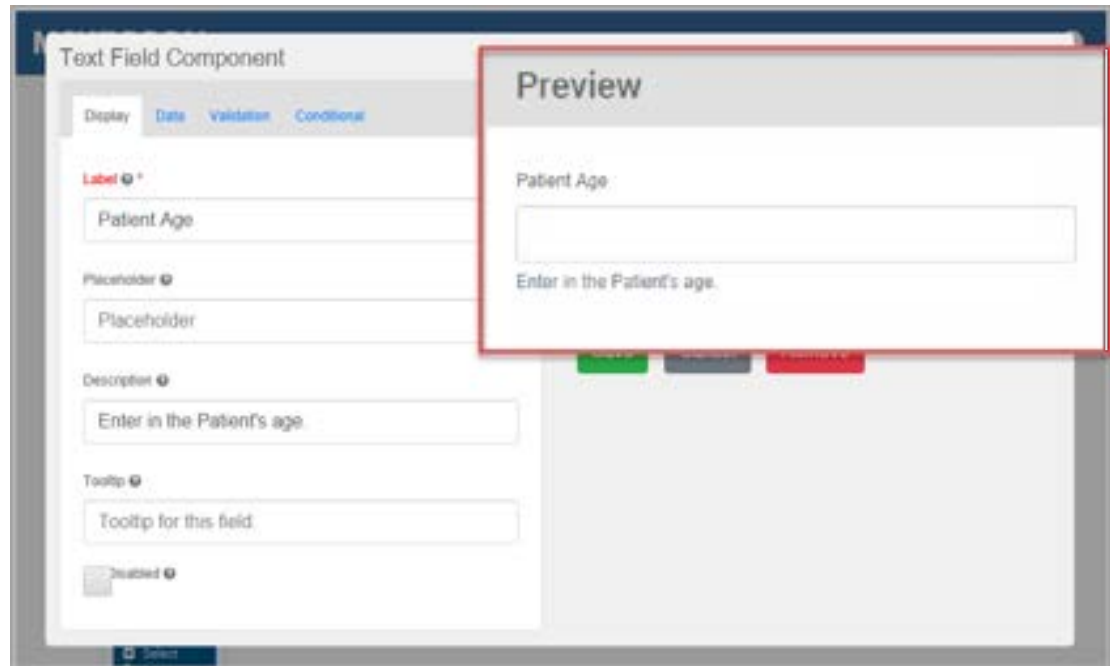
11) Enter the maximum length requirement the **Text Field** must meet.



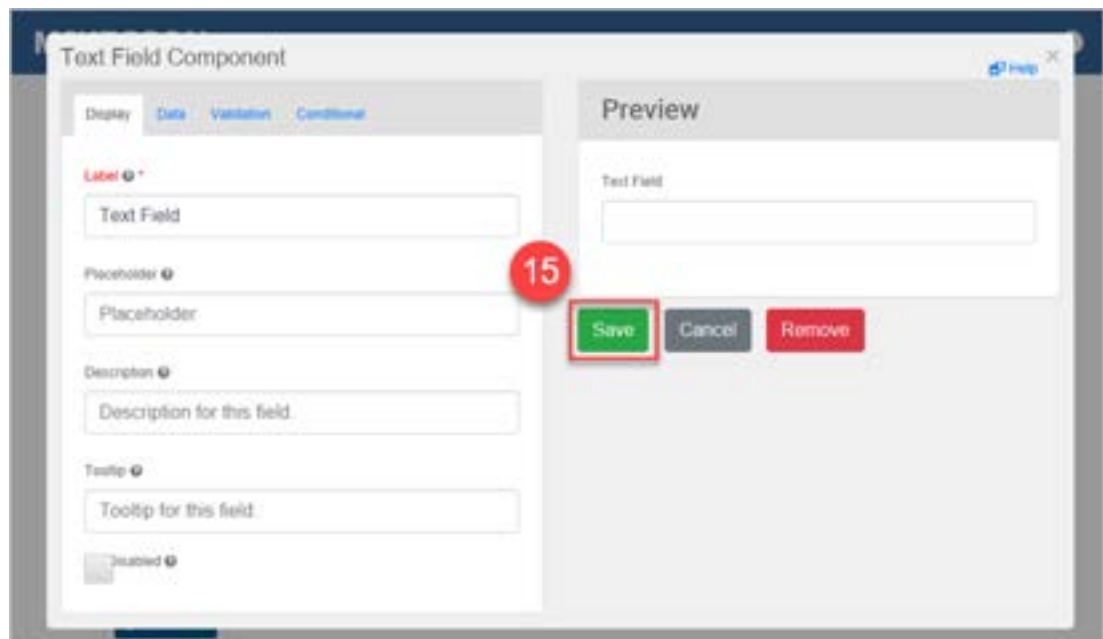
12) Choose **True** or **False** to display this component within the questionnaire based on the field values in steps 13 and 14.

13) Select an existing form component of your questionnaire that will be used as a reference for the condition.

14) Define the value captured in the questionnaire for the form component selected in step 13 to complete the conditional statement.



Preview the form component you are customizing to the right of the tabs, to ensure the form component is going to display as expected in the questionnaire.



15) Select the **Save** button to add the **Text Field** to the questionnaire.

To add more fields to the form, return to step 1 above and repeat the remaining steps as applicable to the component.

Entering Program Codes

The **Program Codes Component** is a form component that allow the association of codes to a patient. **Program Codes** are presented to users for selection in a questionnaire. **Program Codes** can be used in the creation of Data Filters for Program Alerts. **Program Codes** are not a required component for the creation of a Self-Directed Program. The following are some examples which illustrate the use of **Program Codes** in Clinical Programs.

Program Codes Example #1

An example of using ICD- 9 or ICD-10 codes as **Program Codes** for a user to select in a Hypertension Management Program questionnaire, using the **Program Code Component**:

| | Code Type | Code | Description | Data | |
|---|-----------|-------|-----------------|--------------|---|
| ☰ | ICD-9 | 41.60 | Primary Pulmon | Diovan 40mg | ⊗ |
| ☰ | ICD-10 | I27.2 | Other Secondary | Vasotec 40mg | ⊗ |

[+ Add Another](#)
[Save To Patient Profile](#)

The questionnaire could be designed to require questions or data fields to be completed along with the selection of Program Codes in order to complete a questionnaire.

Program Codes Example #2

Another example could be a Pain Management Program administered by the Pharmacy. The Pharmacy may have existing plan data that they want to track and collect, or they might design something totally custom.

The **Custom Code Type** could be any code, description, or data that the Program requires. For example:

| Code Type | Code | Description | Data |
|-----------|------|----------------|-------------|
| Custom | 420 | Pain Managemen | OxyContin |
| Custom | 421 | Pain Managemen | Hydrocodone |
| Custom | 422 | Pain Managemen | Vicodin |

+ Add Another

Save To Patient Profile

Entering Program Codes

MCKESSON CLINICAL PROGRAMS SOLUTION

Questionnaire Builder

NAME*

Hypertension Adherence

22 / 60

Basic

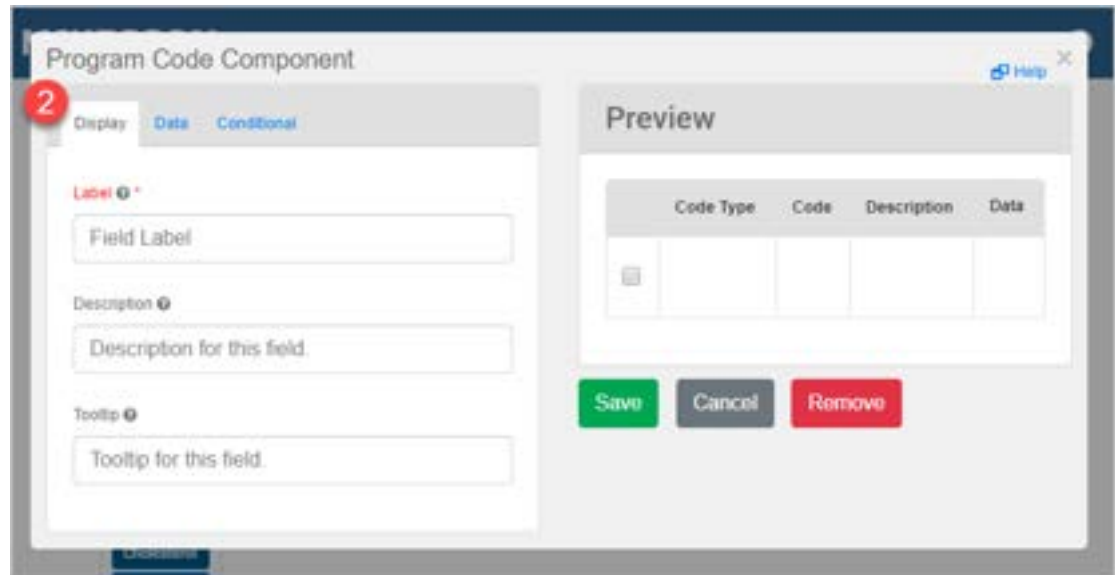
Clinical

- Blood Sugar
- Blood Pressure
- Cholesterol
- Body Mass Index
- Program Code**
- Layout

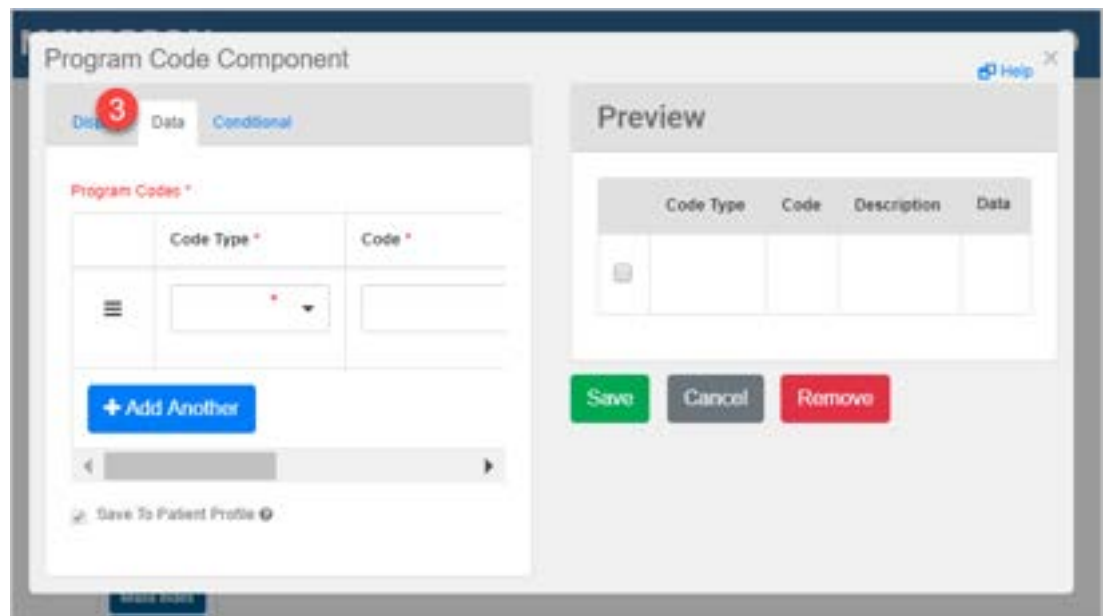
Drag and Drop a form component

Save Preview Cancel

- 1) Under the **Clinical** options, select **Program Codes** and drag and drop to the questionnaire.



- 2) On the **Display** tab enter the details for the component in the following:
 - **Label:** Enter a label that will appear above the **Program Code** table.
 - **Description:** Enter a description that will appear below the **Program Code** table.
 - **Tooltip:** Enter a tooltip that will appear on the right side of the **Label**.



- 3) On the **Data** tab enter the details for the component in the steps, described below.

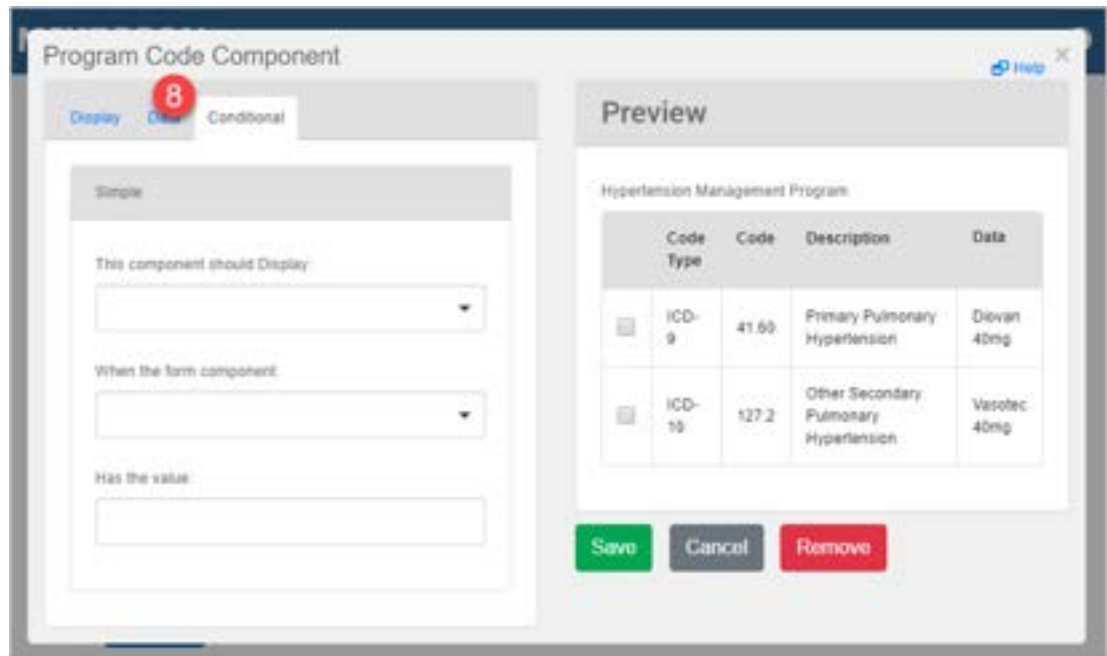
4) Choose whether the code is an **ICD-9**, **ICD-10** or **Custom Code** in the **Code Type** drop-down.

5) Enter the code in the **Code** field.

Note: If creating a custom code, do not include spaces and create a unique code if the code will be used in Data Filter creation. For instance, you may want to use the code complete to indicate patients who were counseled. Complete can be applied in many scenarios, therefore to identify patient who completed diabetes counseling, an example of a unique code maybe Complete_Diabetes. This unique code can be used in the Data Filters for the Program to block message generation for the same patient or to identify the patient as a candidate for Alerts from a different Program.

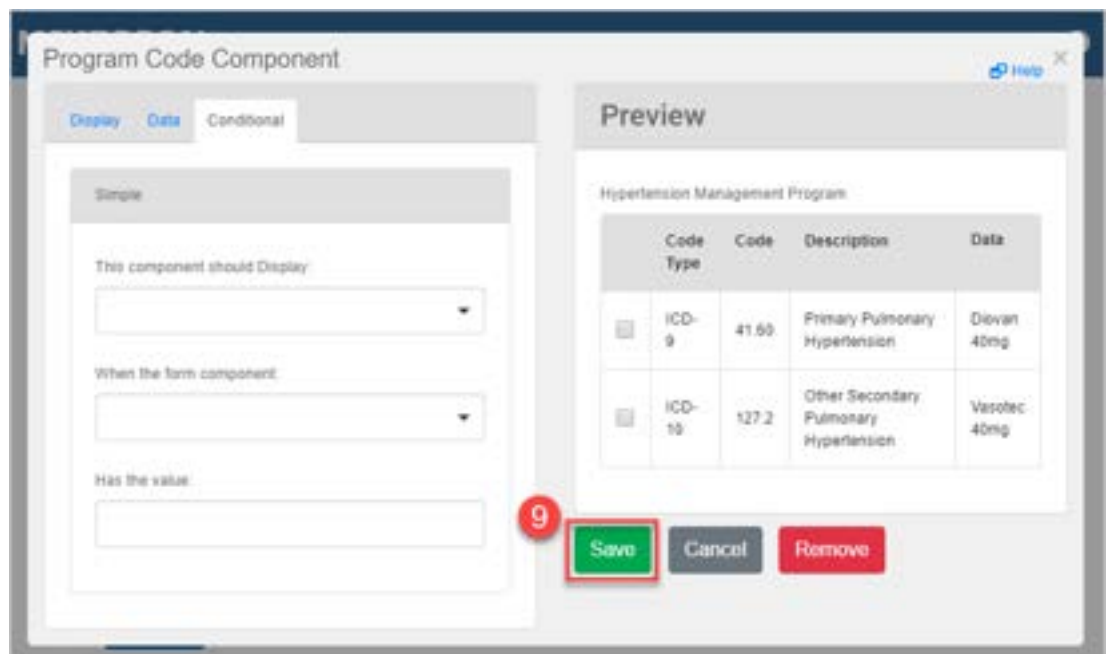
6) Enter a code description in the **Description** text box. This field is not required in order to save the code.

7) Enter the data in the **Data** field with which you want to associate the Program Code, for example, an NDC number or drug name, if you want to associate such with each ICD number. This field is not required to save the code.



8) On the **Conditional** tab enter the details for the component in the following:

- **This component should display:** Choose **True** or **False** to display this component within the questionnaire based on the field values below.
- **When the form component:** Select an existing form component of your questionnaire that will be used as a reference for the condition.
- **Has the value:** Define the value captured in the questionnaire for the form component selected above to complete the conditional statement.

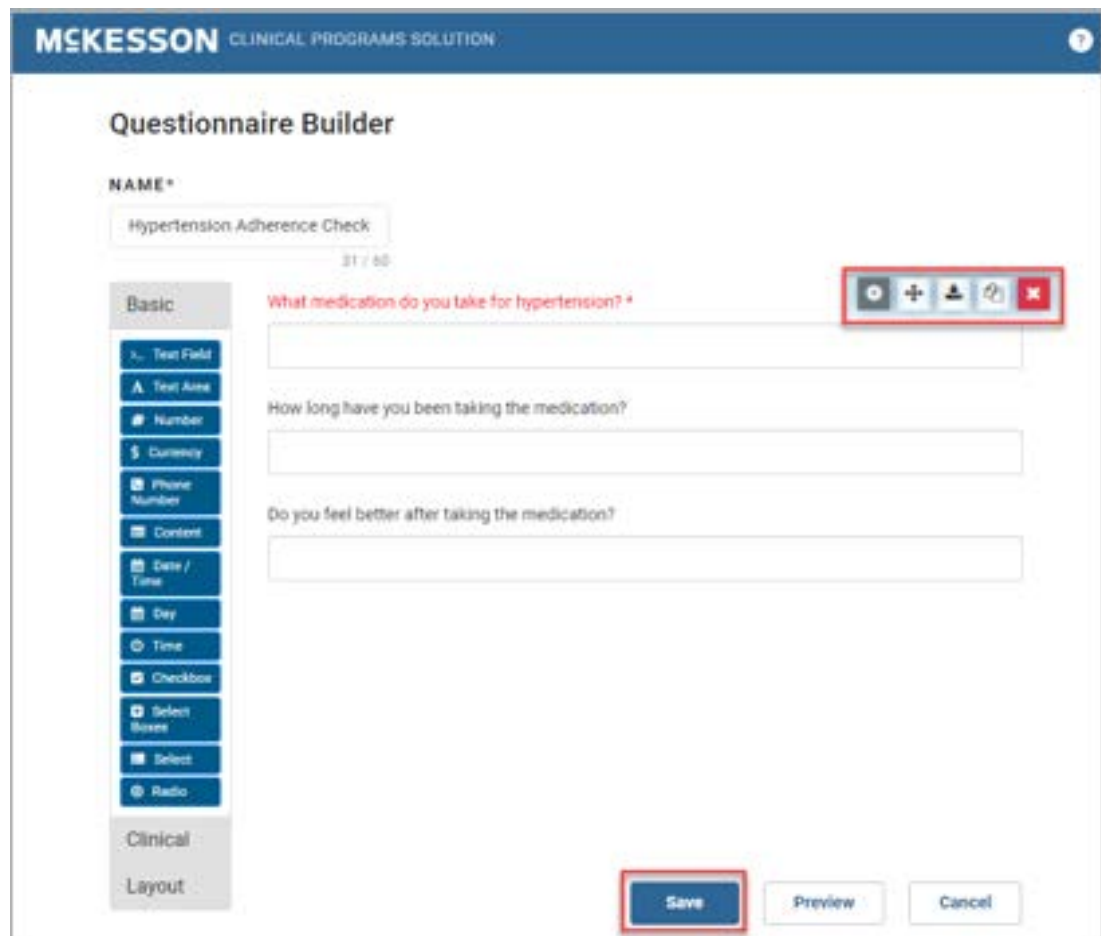


9) Once the **Program Code** component has been configured, select the **Save** button and the system will return to the **Questionnaire Builder** window.

To enter more **Program Codes**, repeat steps 1-8.

Modifying Questionnaires

After inputting all of the components, modifications can be made to the questionnaire by using the buttons on the **Questionnaire Builder**, highlighted in the window and described below.



- **Edit Field:** Select the **Edit** icon (⚙️) to open the component to edit the configuration.
- **Move:** Select the **Move** icon (✚) and hold to drag the component and move it.
- **Paste:** Select the **Paste** icon (📄) to paste a copy of the component.
- **Copy:** Select the **Copy** icon (📄) to copy the component.
- **Remove:** Select the **Remove** icon (❌) and the component is removed.

Once the components have been modified select the **Save** button and the system will return to the **Clinical Program Builder** window.



Important: If the questionnaire is edited, the questionnaire will be updated for any Program Alert or Program that also has that questionnaire associated to it.

Saving a New Questionnaire from an Existing Questionnaire

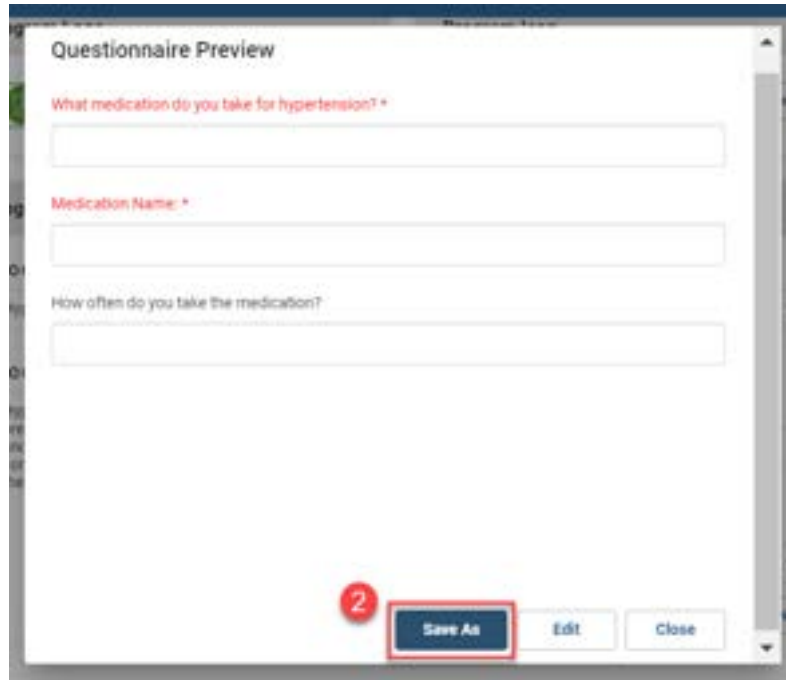
After a questionnaire has been built, you have the ability to do a **Save As** and save the questionnaire with a new name.

The screenshot displays the 'MCKESSON CLINICAL PROGRAMS SOLUTION' interface. It features a 'Program Logo' section with a 'Hypertension Adherence' logo and 'Change'/'Remove' buttons. A 'Program Icon' section shows a green circular icon with 'HP' and 'Change'/'Remove' buttons. The 'Program Information' section includes:

- PROGRAM NAME***: 'Hypertension Adherence Program' (30/60 characters)
- ENROLLMENT TYPE**: 'Patient Enrollment' dropdown, with 'Check-In Program' checked.
- PROGRAM DESCRIPTION**: A text area containing the text: 'Hypertension is another name for high blood pressure. It can lead to severe health complications and increase the risk of heart disease, stroke, and sometimes death. Despite having good medication, the best control depends on patient's adherence.' (247/600 characters)
- EXPIRATION SETTING**: '7'
- ASSOCIATE QUESTIONNAIRE***: 'Hypertension Check-in' dropdown.

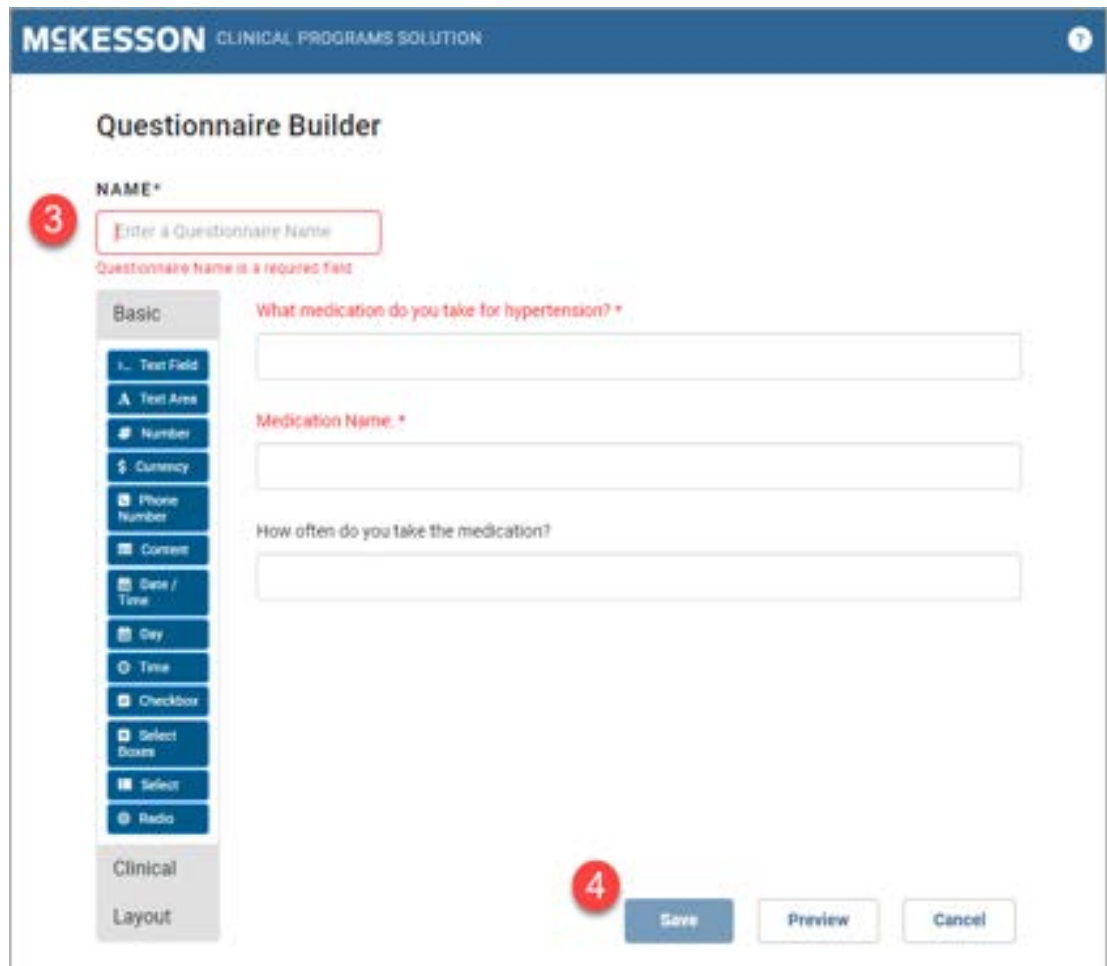
 At the bottom right, a red circle with the number '1' points to a red-bordered box around the 'Preview' button, with a 'Create New' button next to it.

- 1) On the **Clinical Program Builder** window select a questionnaire from the **Associate Questionnaire** drop-down and then select the **Preview** button.



The screenshot shows a window titled "Questionnaire Preview". Inside the window, there are three text input fields. The first field is labeled "What medication do you take for hypertension? *". The second field is labeled "Medication Name: *". The third field is labeled "How often do you take the medication?". At the bottom of the window, there are three buttons: "Save As", "Edit", and "Close". The "Save As" button is highlighted with a red box, and a red circle with the number "2" is placed to its left.

- 2) On the **Questionnaire Preview** window select the **Save As** button. The **Questionnaire Builder** will open with the questionnaire in context without a **Name**.



- 3) Enter a questionnaire **Name**. Once a **Name** is entered the **Save** button becomes active.
- 4) Once the updates are made to the questionnaire, select the **Save** button.

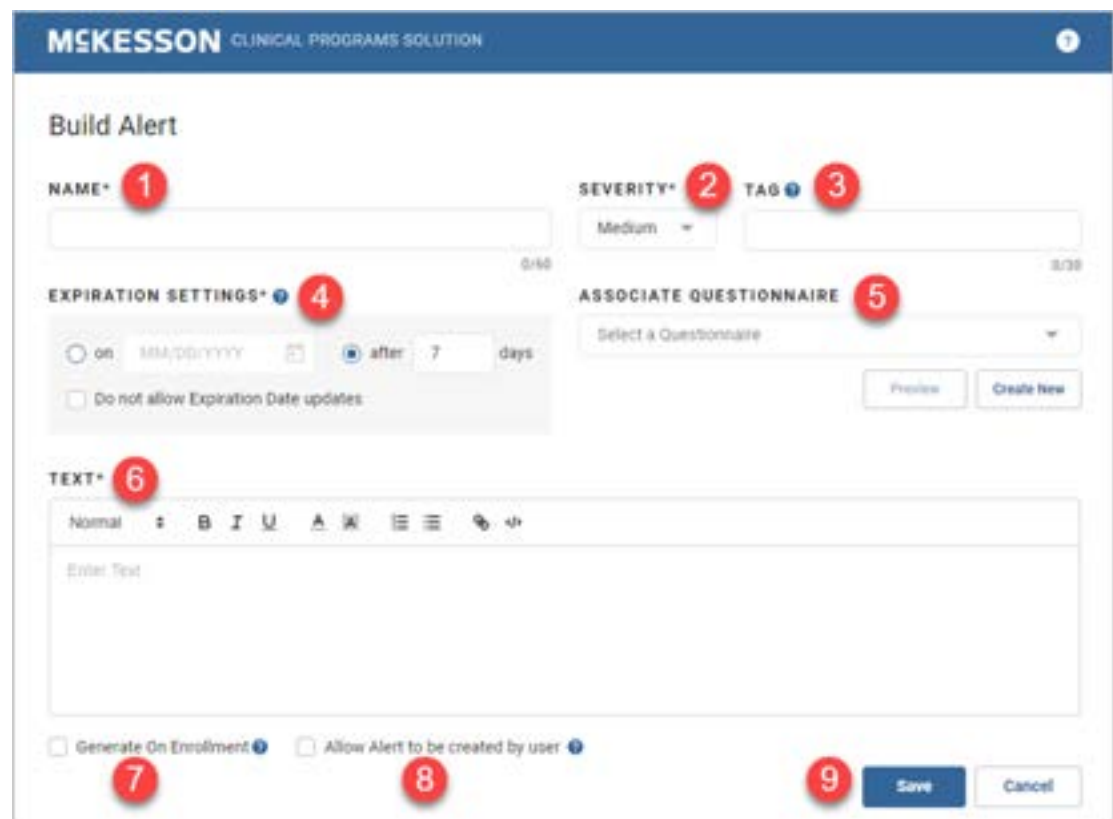
For more information on building questionnaires please refer to ["Building Questionnaires"](#) on page 15 and for additional information on modifying questionnaires refer to ["Modifying Questionnaires"](#) on page 28.

Building Program Alerts

Program Alerts are the Alerts that will be displayed to users and can prompt the user to have a patient interaction, for example, provide counseling on dosing to the patient or gather patient’s vital data.



To begin select the **Add** button.



- 1) Enter an Alert **Name**. Names are unique to each Program. The character limit for this field is 60 characters.
- 2) Use the **Severity** drop-down to set Alert severity. Alerts displayed throughout the system will be prioritized based on the severity chosen here. The default is **Medium**.

- 3) Enter a unique identifier for the Alert in the **Tag** field. The **Tag** field is used during reporting in order to quickly identify an Alert. While the character limit for this field is 30 characters, **Tags** are typically kept short to allow for quick identification of the Alert and must be unique across all Program Alerts for the Program. Although not required, if no **Tag** is provided for an Alert when the Program is saved, a **Tag** will be systematically assigned to the Alert.

Note: The systematically assigned **Tag** will consist of the Program’s initials (first letter of the first word in the Program’s name, followed by the first letter of the last word in the Program’s name) and a numeric identifier (ex. 1, 2, 3, ..., x). If the Program’s name is only one word, the Program’s initials will just be one letter (the first letter of the Program’s name).


- 4) Set the **Expiration Settings** for the Alert using the following:
 - Select either the **on** option to set hard expiration date, or the **after** to set the expiration date in rolling days.
 - Select the **Do not allow Expiration Date Updates** checkbox, if you wish to restrict manual and automatic expiration date updates by the user.
- 5) Select to associate a questionnaire from the **Associate Questionnaire** drop-down menu. Once a questionnaire is associated, select the **Preview** button to view and make changes to the existing questionnaire. Also, you can create a new questionnaire by selecting the **Create New** button. For more information on building questionnaires please refer to "[Building Questionnaires](#)" on page 15 and for additional information on modifying questionnaires refer to "[Modifying Questionnaires](#)" on page 28.



Important: If the questionnaire is edited, the questionnaire will be updated for any Program Alert or Program that also has that questionnaire associated to it.

- 6) Enter the Alert text in the **Text** field. This field is required. While the character limit for this field is 8,000 characters, Alerts are typically kept short to allow the user to read them quickly. You can customize the text more by using the text formatting options such as; font size and color, bold, underline and more.



Tip: Hyper-links can be built into a Program Alert, to provide pharmacy staff quick access to a specific external site. All Alert hyper-links will open in the default browser. First enter the text you want to display for the hyper-link and then highlight the text and then select the **Hyper-link** icon (). Input the desired URL address in the **Enter link** field and select the **Save** button.

- 7) Select the **Generate On Enrollment** checkbox if you want this Alert to automatically generate and display in the **Clinical App** and **Task Queue** upon patient enrollment. Any number of Alerts can be set to generate on enrollment for a given Self-Directed Program.

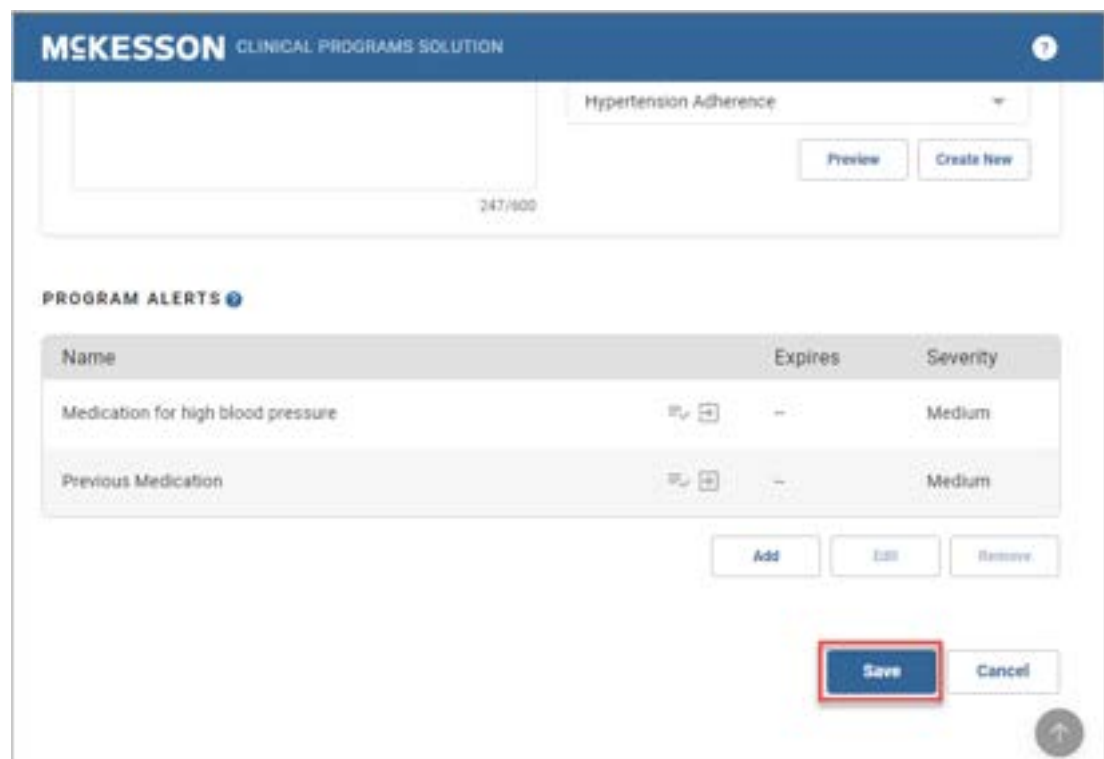
Note: For patients who are unenrolled from a given Program, and then re-enrolled in the same Program:

- If the patient already has an unexpired, unresolved Alert for that Program, an Alert will not be generated to avoid duplication.
- If the patient had an Alert that expired or was resolved for that Program, a new Alert will be generated.

- 8) Select the **Allow Alert to be created by user** check box to allow a user to create an Alert when needed, from the **Clinical App** using this Alert as a starting point.
- 9) Once the Alert has been built, select the **Save** button and the system will return to the **Clinical Program Builder** window.

Repeat steps 1-9 above until all of the Program Alerts have been added.

Saving the Program



When the information for the Program is complete, save your Program by selecting the **Save** button at the bottom of the **Clinical Program Builder** window, or **Cancel** to discard the changes.

Once you've finished building your Program you're ready to move on to [Chapter 4: Activating Self-Directed Programs](#).

4. Activating Self-Directed Programs

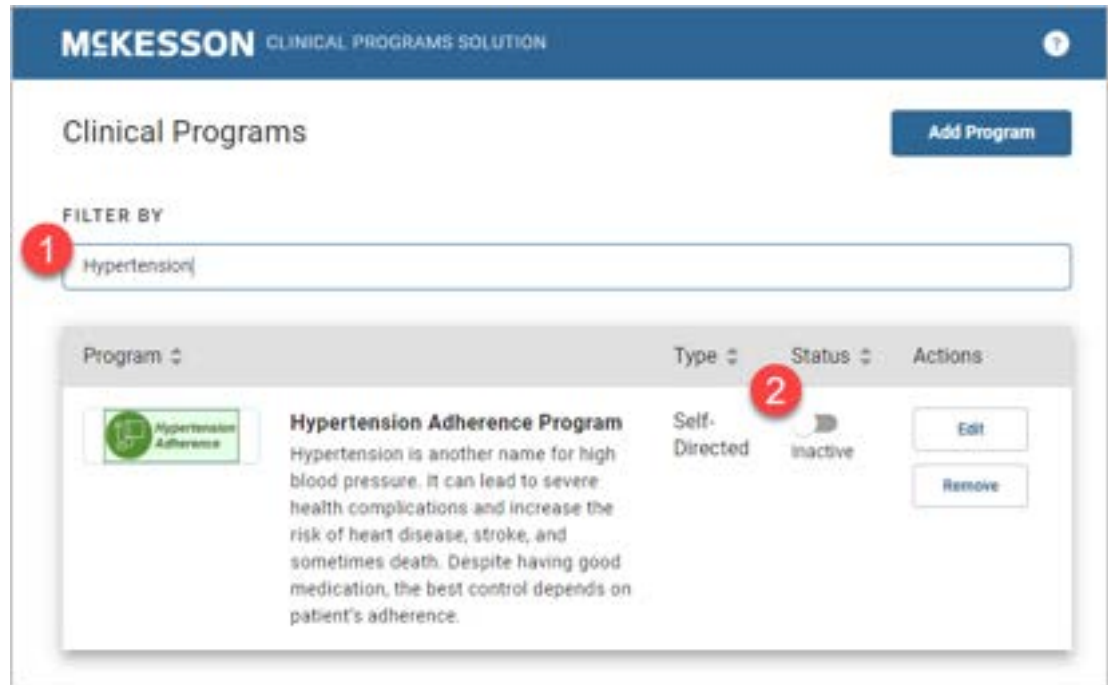
After building a Self-Directed Program, the next step is to activate it.

Steps to Activating Self-Directed Programs

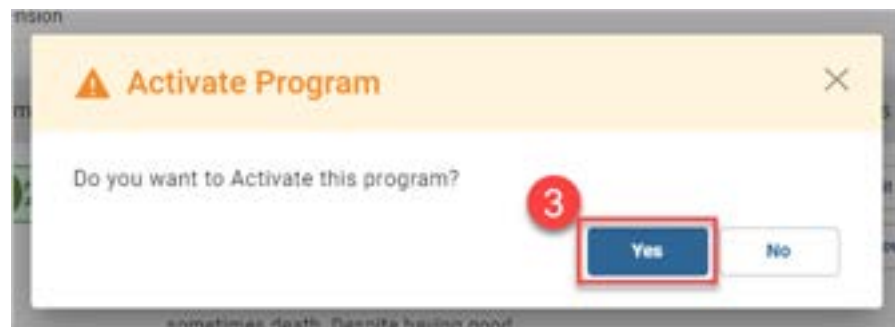
- ["Activating Self-Directed Programs" on page 38](#)

Activating Self-Directed Programs

To activate the Program, navigate to **CPS Program Builder**.



- 1) Type the Program name into the **Filter By** text box. If several names include the same character string, they will all show in the list. The more characters that are entered into the filter, the fewer entries that will be contained in the list.
- 2) When the Program displays in the list, toggle the status to **Active**.



- 3) Select **Yes** from the pop-up window to activate the Program.

After activating the Program, the next step is to configure it. Go to [Chapter 5: Configuring Clinical Programs](#) to continue.

5. Configuring Clinical Programs

After a Program has been built and activated, the next step is to configure it. This is where the triggers for Alerts will be set up for the Program; in other words, you will configure what data input by the user will cause an Alert to be displayed in the system. For example, when a certain NDC is filled the Program will display an Alert to the user.

Note: This is also the area in which triggers for a Vendor Program will be set up. The instructions below will not give you specific details about the filters you need to set up for Vendor Programs, but it will outline how filters are set up in general. Contact the Vendor directly to configure the specific filters needed for a Vendor Program.

Tasks in Configuring Clinical Programs

- ["Getting Started with Program Configuration" on page 40](#)
 - ["Configuring a Clinical Program" on page 40](#)
- ["Setting Up Data Filters for Program Enrollments" on page 41](#)
 - ["Example Data Filter for First Databank \(FDB\)" on page 42](#)
 - ["Example Data Filter for Medi-Span" on page 43](#)
 - ["Simple Data Filter Example" on page 43](#)
 - ["Complex Data Filter Example #1" on page 45](#)
 - ["Complex Data Filter Example #2" on page 47](#)
 - ["Adding an Array of Values with the IN and NOTIN Operators" on page 48](#)
 - ["Vendor Program Automatic Enrollment" on page 51](#)
- ["Setting Up Follow-Ups for Program Enrollment" on page 52](#)
 - ["Editing Follow-Ups" on page 53](#)
- ["Setting the Time Period to Re-Ask Patients to Enroll" on page 53](#)
- ["Setting the Recurrence for Check-In Programs" on page 54](#)
- ["Setting the Due Date Reminder for Program Enrollments and Alerts" on page 55](#)

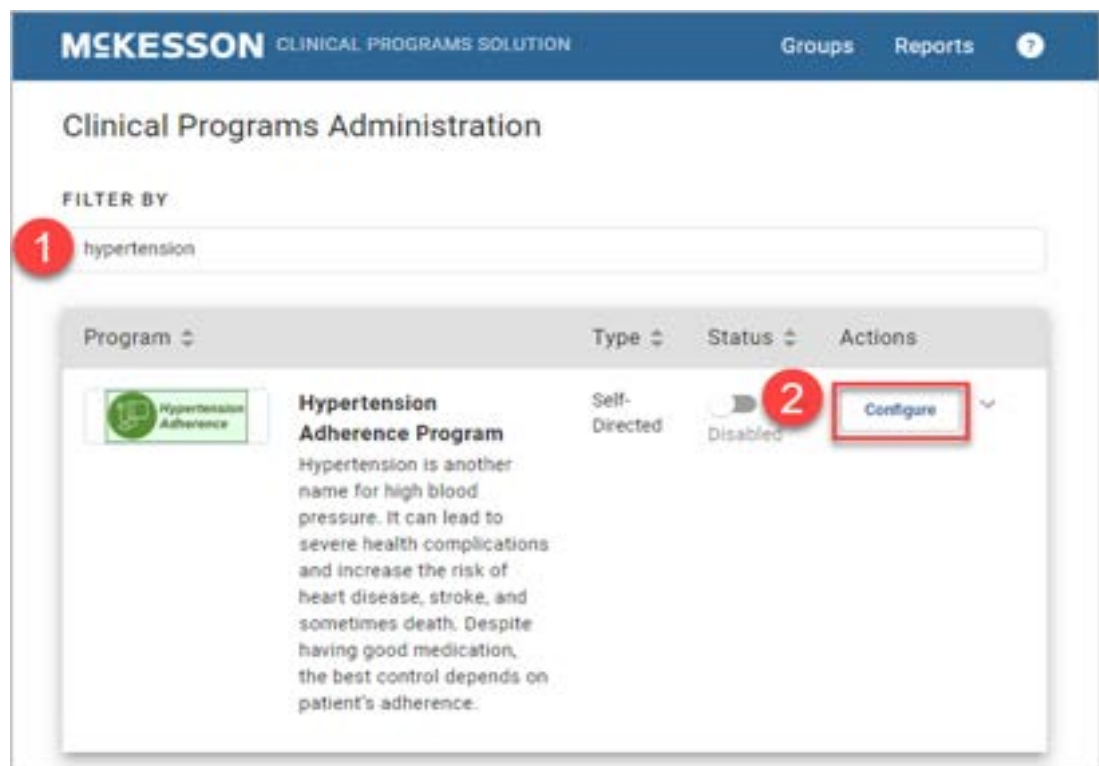
- "Setting Up Data Filter, Bulk Alert and Follow-Ups for Program Alerts" on page 56
 - "Data Filter" on page 56
 - "Bulk Alert" on page 58
 - "Follow-Ups" on page 61
- "Bulk Enrolling Patients into Self-Directed Program" on page 64
- "Saving Program Configuration" on page 66

Getting Started with Program Configuration

Configuring a Clinical Program

Navigate to **CPS Program Admin**.

If using EnterpriseRx, navigate to the builder from the menu bar, select **Administration > Clinical Rx Programs > Clinical Programs Solution > CPS Program Admin**.



- 1) Type the Program name into the **Filter By** text field. If several names include the same character string, they will all show in the list. The more characters that are entered into the filter, the fewer entries that will be contained in the list.

- 2) Select the **Configure** button next to the Program when it displays in the list.

Setting Up Data Filters for Program Enrollments

The Data Filters in the **Patient Enrollment** portion of the window are the filters you set up to determine the enrollment criteria for your Program. When the criteria have been met, a patient enrollment Alert will be triggered during workflow.

Note: You will only see the **Data Filter** button in the **Patient Enrollment** section for Programs with an **Enrollment Type** of **Patient Enrollment** (not for those with an **Enrollment Type** of **No Enrollment**).

Data Filter Operators:

The following operators are available for use when creating Data Filters for your Program:

- = (Filters for items with a value that is equal to the value entered in the **Value** field.)
- != (Filters for items with a value that is not equal to the value entered in the **Value** field.)
- <= (Filters for items with a value that is less than or equal to the value entered in the **Value** field.)
- >= (Filters for items with a value that is greater than or equal to the value entered in the **Value** field.)
- < (Filters for items with a value that is less than the value entered in the **Value** field.)
- > (Filters for items with a value that is greater than the value entered in the **Value** field.)
- IN (Filters for items that match the value/s defined in the **Value** field.)
- NOTIN (Filters for items that do not match the value/s defined in the **Value** field.)
- STARTS WITH (Filters for items that start with the value entered in the **Value** field.)

Note: For entries in the value field:

- Text/name entries in the Value field are case sensitive. For example: a filter is created so that the written product name starts with “dio.” If the product selected is Diovan, the filter will not match.

- The entire name of a medication must be entered if a direct match is desired by utilizing the equal sign operator. For example: a filter is created so that the written product is equal to “Diovan.” If the product selected is “Diovan 40mg tab,” the filter will not match.
- If NDC numbers are entered, the hyphens must be omitted.



Tip: For Self-Directed Programs, you'll be making your own decisions on what your filters include. Below is an example of a simple filter and a couple of more complex filters to give you an illustration of some of the different options available.



Important: For customers that leverage First Databank (FDB), when adding a GCN Data Filter, ensure that leading zeros **are not included** in the GCN(s) [example: correct GCN = 1234; incorrect GCN = 01234]. For customers leveraging Medi-Span, the leading zero **must be included** when adding a GPI Data Filter [example: correct GPI = 01234567890000; incorrect GPI = 1234567890000].

Example Data Filter for First Databank (FDB)

The screenshot shows the MCKESSON CLINICAL PROGRAMS SOLUTION interface. At the top, there are navigation links for 'Groups' and 'Reports'. The main content area is titled 'DATA FILTER PREVIEW' and contains a text box with the filter rule: 'Dispensed Product GPI GCN = 1234'. Below this is the 'SELECTION CRITERIA' section, which includes a table for adding data filter rules. The table has columns for 'Data', 'Attribute', 'Operator', 'Value', and 'Connector'. A red box highlights the 'Value' field containing '1234', with a callout box pointing to it that says 'Do not add leading zero(s) if present, if leveraging First Databank'. At the bottom of the interface are 'Add Row', 'Delete Row', 'Undo Changes', 'Save', and 'Cancel' buttons.

| (| Data | Attribute | Operator | Value |) | Connector |
|--------------------------|-----------------|-----------|----------|-------|---|-----------|
| <input type="checkbox"/> | Dispensed Pr... | GPI GCN | = | 1234 | | Select |

Example Data Filter for Medi-Span

MCKESSON CLINICAL PROGRAMS SOLUTION Groups Reports ?

DATA FILTER PREVIEW Test Data Filter

Dispensed Product.GPI GCN = 01234567890000

SELECTION CRITERIA
Add Data Filter Rules to Trigger Events

| (| Data | Attribute | Operator | Value |) | Connector |
|--------------------------|-----------------|-----------|----------|-----------------|---|-----------|
| <input type="checkbox"/> | Dispensed Pr... | GPI GCN | = | 0123456789000 🔍 | | Select ▼ |

Add Row Delete Row Undo Changes

Save Cancel

Simple Data Filter Example

First, a very simple filter will be created that will trigger an enrollment when the prescription is for a specific written product (NDC Number 11 digits):

MCKESSON CLINICAL PROGRAMS SOLUTION Groups Reports ?

Configure Hypertension Adherence Program

Patient Enrollment

REFUSAL PERIOD ? **DUE DATE REMINDER** ?

3 Months ▼ 5 Days

Data Filter Follow-Ups

- 1) Select the **Data Filter** button to get started configuring the Data Filters.

The screenshot shows the 'DATA FILTER PREVIEW' section at the top, which is currently empty and has a 'Test Data Filter' button. Below this is the 'SELECTION CRITERIA' section, which includes a header 'Add Data Filter to Trigger Events'. The criteria are defined in a table with columns: Data, Attribute, Operator, Value, and Connector. The 'Add Row' button is highlighted with a red box. Red circles with numbers 2 through 6 are overlaid on the interface to indicate the steps for configuring a filter row.

Select the **Add Row** button to add a new row to the Data Filter.

- 2) Use the **Data** drop-down to choose the data category. In this example, **Written Product** was used.
- 3) Next, use the **Attribute** drop-down to choose an attribute. The input made in the **Data** field in step 2 will determine the available options in the drop-down menu. For this example, the attribute **NDC Number** was used.
- 4) Choose the **Operator**. In this example we want to trigger an enrollment for our Hypertension monitoring Program every time certain types of hypertension medications are filled and have chosen the '=' operator here.
- 5) Enter the value into the **Value** field.
- 6) Check the **Data Filter Preview** box above to ensure that your filter has been configured correctly.

Note: Select the **Undo Changes** button to clear any changes you made to the Data Filter.

McKESSON CLINICAL PROGRAMS SOLUTION Groups Reports 7

DATA FILTER PREVIEW Test Data Filter

Written Product NDC Number 11 Digits = 00078042315

SELECTION CRITERIA
Add Data Filter Rules to Trigger Events

| (| Data | Attribute | Operator | Value |) | Connector |
|--------------------------|--------------------------|-------------------|--------------|-------|---------------|-----------------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | Written Product ▾ | NDC Number ▾ | = ▾ | 00078042315 🔍 | <input type="checkbox"/> Select ▾ |

7

7) If the information entered is correct, select the **Save** button to add the Data Filter.

The following are some examples of Data Filters that are more complex:

Complex Data Filter Example #1

Now a more complex filter will be created. For example, a filter will be created that will trigger an enrollment when the dispensed product is the generic equivalent of the written NDC listed in the example above.

After you complete steps 1-6 above, do the following:

McKESSON CLINICAL PROGRAMS SOLUTION Groups Reports 1

DATA FILTER PREVIEW Test Data Filter

Written Product NDC Number 11 Digits = 00078042315

SELECTION CRITERIA
Add Data Filter Rules to Trigger Events

| (| Data | Attribute | Operator | Value |) | Connector |
|--------------------------|-----------------|--------------|----------|-------------|---|-----------|
| <input type="checkbox"/> | Written Prod... | NDC Numbe... | = | 00078042315 | | AND |

Add Row
Delete Row
Save
Cancel

- 1) Select the drop-down arrow in the **Connector** field and scroll to **OR**.
- 2) Select the **Add Row** button and repeat steps two through 6 of the [Simple Data Filter Example](#) instructions above, adding the dispensed product information to the new row.

McKESSON CLINICAL PROGRAMS SOLUTION Groups Reports 1

DATA FILTER PREVIEW Test Data Filter

Written Product NDC Number 11 Digits = 00078042315 OR Dispensed Product NDC Number 11 Digits = 00093743156

SELECTION CRITERIA
Add Data Filter Rules to Trigger Events

| (| Data | Attribute | Operator | Value |) | Connector |
|--------------------------|-----------------|--------------|----------|-------------|---|-----------|
| <input type="checkbox"/> | Written Prod... | NDC Numbe... | = | 00078042315 | | OR |
| <input type="checkbox"/> | Dispensed P... | NDC Numbe... | = | 00093743156 | | Select |

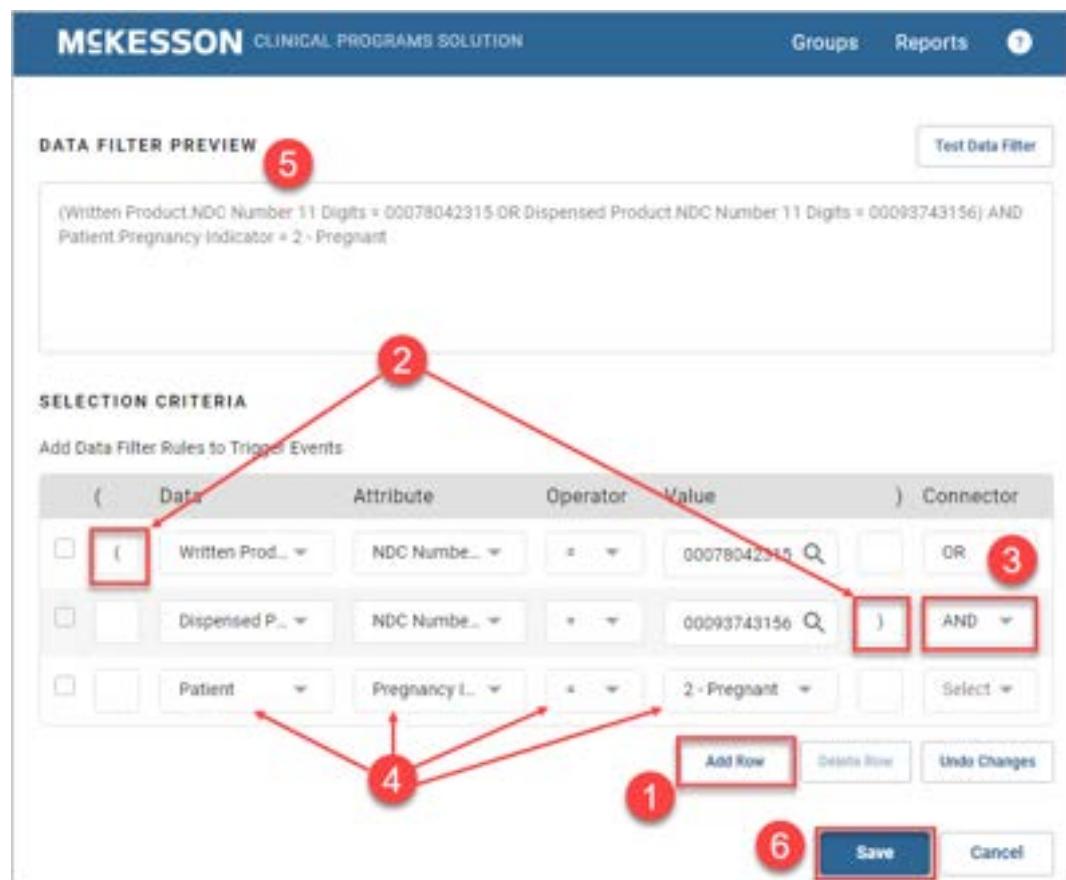
Add Row
Delete Row
Undo Changes
Save
Cancel

- 3) Check the **Data Filter Preview** box above your Data Filter and ensure that the filter has been configured correctly.
- 4) Select **Save** to add the Data Filter.

Complex Data Filter Example #2

In this example, an additional row will be added to the filter that was created in **Complex Filter Example #1**. The additional row will trigger enrollment for a patient when either one of two product NDCs are filled AND the patient is pregnant. This is a situation in which you will have to insert parenthesis in the appropriate fields.

After creating the filter in the **Complex Filter Example #1**, complete the following steps:

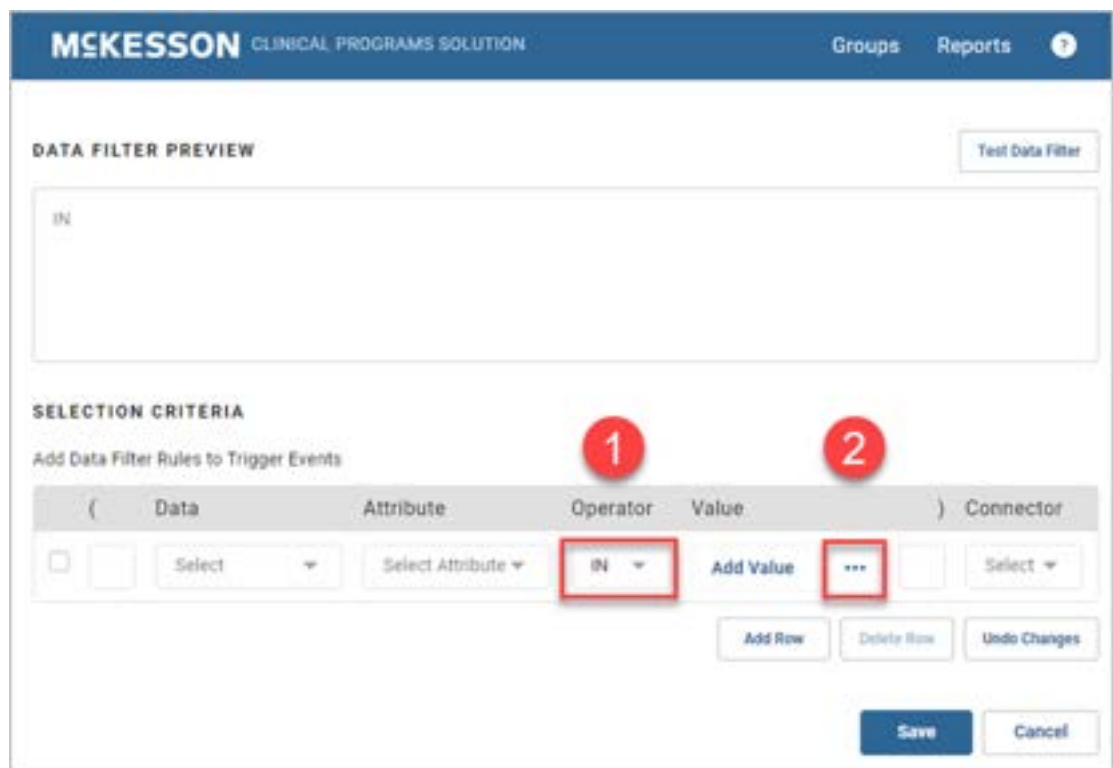


- 1) Select the **Add Row** button.
- 2) Insert the open and closed parenthesis as shown in the image above.
- 3) Select the drop-down for **Connector** and choose **AND**.
- 4) Insert the row fields with the following:
 - **Patient** in the **Data** field

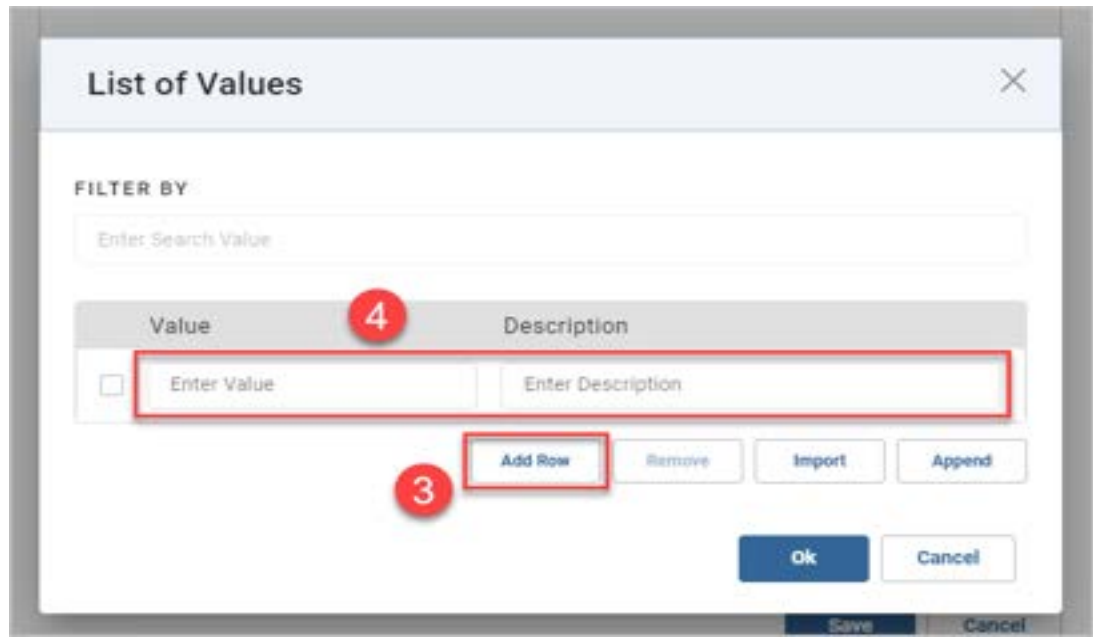
- **Pregnancy Indicator** in the **Attribute** field
 - **=** in the **Operator** field
 - **2 – Pregnant** in the **Value** field.
- 5) Check the **Data Filter Preview** box above your Data Filter and ensure that the filter has been configured correctly.
 - 6) Select the **Save** button to save the Data Filter.

Adding an Array of Values with the IN and NOTIN Operators

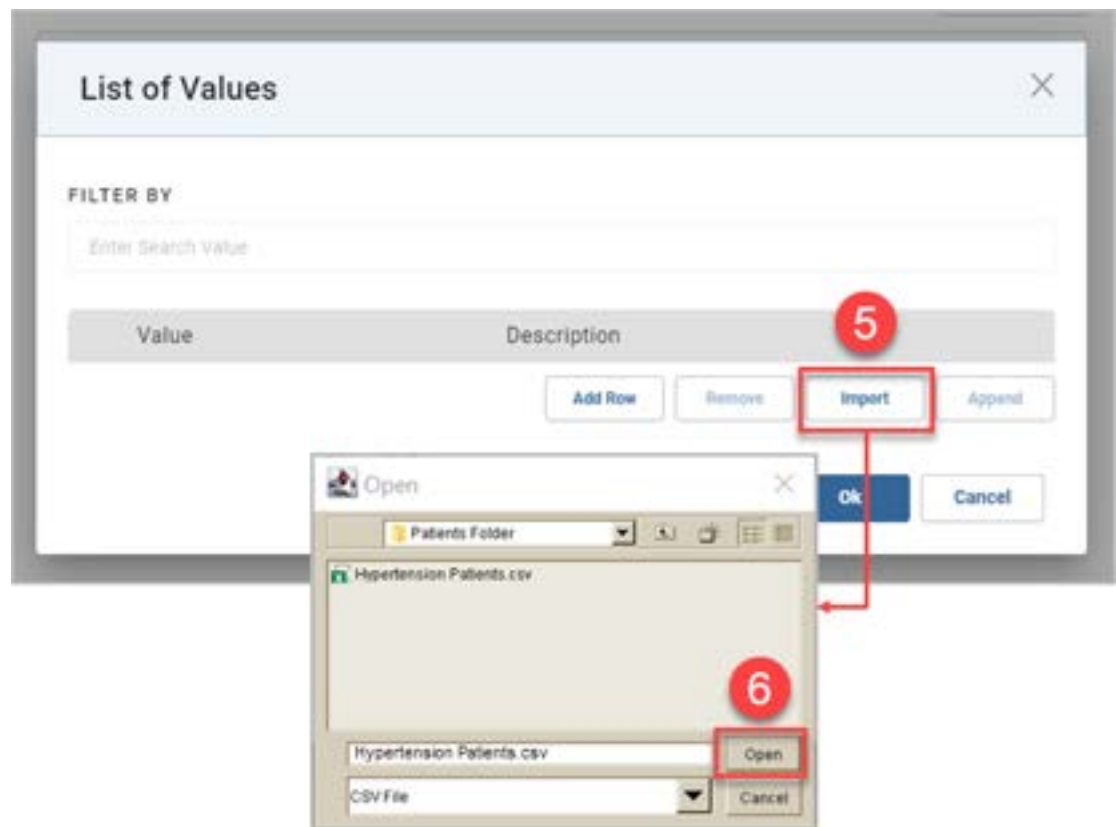
When using the **IN** and **NOTIN** operators in a Data Filter, you can add an array of values by individually adding each value, or you can add multiple values at a time by importing a comma-separated values (CSV) file.



- 1) Select **IN** or **NOTIN** from the **Operator** drop-down.
Note: The **IN** and **NOTIN** operators do not support the **Age** attribute for the **Patient** data element.
- 2) In the **Value** field, select the ellipsis (...) to open the **List of Values** window.



- 3) Select the **Add Row** button to add new individual values to the list.
- 4) Enter the **Value** and **Description** for each item in the list. The **Description** field is optional.



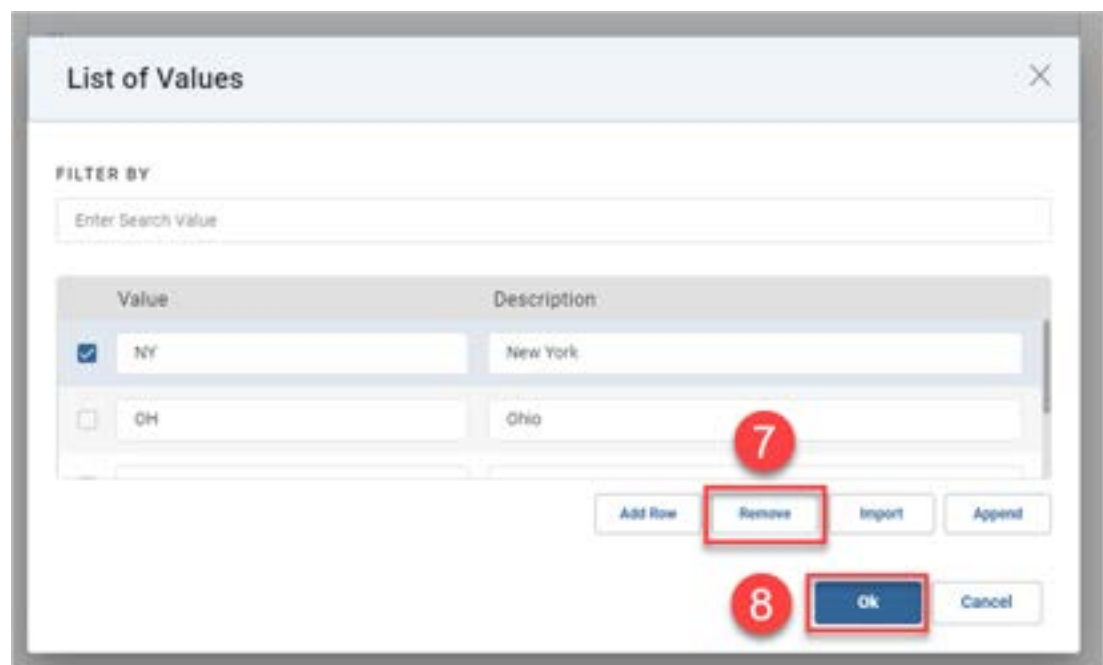
- 5) To upload multiple values at once using a CSV file, select the **Import** button. Using the **Import** button to import a CSV file will override any existing items in the list. Alternatively, you can use the **Append** button to

import a CSV file. Using the **Append** button does not overwrite any existing list items and will add the new values at the end of the list.

Note: The format of the CSV file is a value and description on each line, separated by a comma. The header format of the CSV file needs to match the field names on the **List** window. For example:

```
Value,Description
NY,New York
OH,Ohio
PA,Pennsylvania
WV,West Virginia
```

- 6) Select the CSV file and select the **Open** button to add the items from the file to the list.



- 7) To remove an individual item, select the check box next to the item and select the **Remove** button.
- 8) When you are done making changes, select the **Ok** button to return to the previous window.



Important: Data Filters are specific to the Pharmacy Management System (PMS), and to the version of software that the PMS is running. Consult the list of [Enrollment and Program Alert Data Filters](#) in [Chapter 17: Appendix](#) for a list of available Data Filters.

Vendor Program Automatic Enrollment

CPS provides the option to automatically enroll eligible patients into select Vendor Programs, when the patient meets the Program’s enrollment Data Filter criteria.

When this option is supported for a Vendor Program, the **Automatically Enroll Eligible Patients** checkbox will display in the window.

The screenshot shows the MCKESSON CLINICAL PROGRAMS SOLUTION interface. At the top, there are navigation links for 'Groups' and 'Reports', and a help icon. The main content area is divided into two sections: 'DATA FILTER PREVIEW' and 'SELECTION CRITERIA'. The 'DATA FILTER PREVIEW' section contains a large empty text area and a 'Test Data Filter' button. The 'SELECTION CRITERIA' section has a heading 'Add Data Filter Rules to Trigger Events' and a table with columns for 'Data', 'Attribute', 'Operator', and 'Value'. Below the table, there are several buttons: 'Add Row', 'Delete Row', and 'Undo Changes'. At the bottom right, there are 'Save' and 'Cancel' buttons. A red box highlights the checkbox labeled 'Automatically Enroll Eligible Patients' with a help icon.

When the criteria have been met and this checkbox is selected, the patient will be automatically enrolled into the Vendor Program and no patient enrollment Alert will be created.

Setting Up Follow-Ups for Program Enrollment

The Follow-Ups feature allows an admin to configure responses that can be used as standardized text to note action taken on the Program Enrollment Alert. There is also a free text option.

- 1) To start configuring Follow-Ups, select the **Follow-Ups** button and the **Follow-Ups** window displays.

- 2) In the field enter the text for the Follow-Up Response.
- 3) Enter a **Due Date Update** in days or leave it blank. When this **Follow-Up Response** is selected for an Alert, the Alert's due date is calculated by adding the number of days specified in the **Due Date Update** field to the current calendar date. If the Alert's due date should not be automatically updated leave the **Due Date Update** field blank.
- 4) Select the **Save** button to save the Follow-Up Response.

To add additional Follow-Up Responses, select the **Add Row** button and a new row will be added to the bottom of the list.

To edit responses follow the steps in [Editing Follow-Ups](#) below.

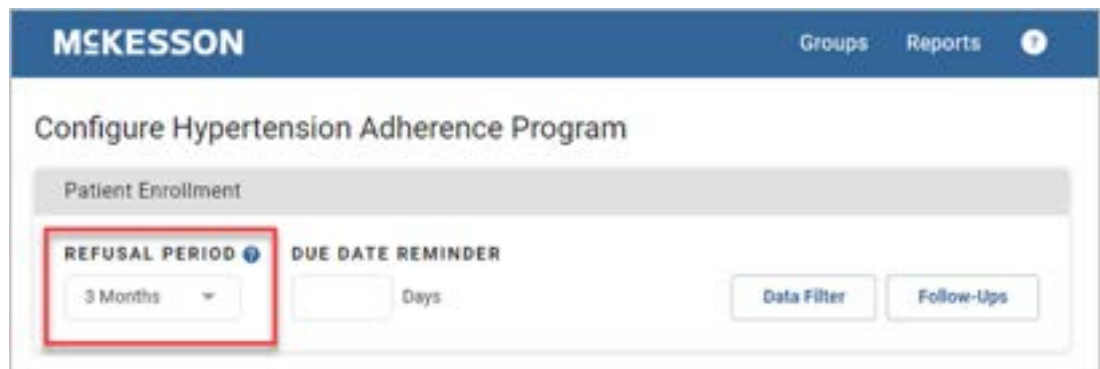
Editing Follow-Ups

- 1) Edit a Follow-Up Response by selecting the specific response and editing the text.
- 2) To delete one or more Follow-Up Responses check the check-box next to the response you want to delete and select the **Delete Row** button.
- 3) Additionally, you can use the arrows to move the position of a Follow-Up Response up or down.
- 4) Select the **Save** button to save the edited Follow-Up Responses.

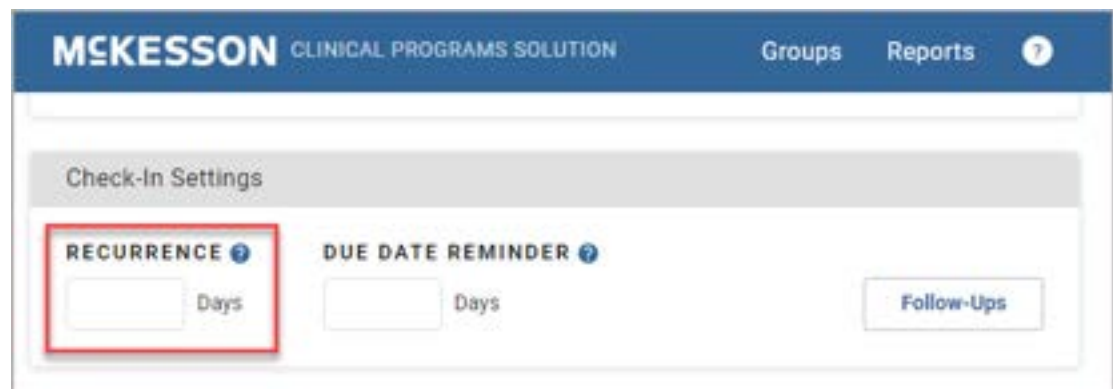
Setting the Time Period to Re-Ask Patients to Enroll

If an enrollment Alert is triggered and the pharmacist asks the patient if they would like to enroll in a Program, but they decline, they may want to ask the patient again sometime in the future. You can select a numeric value (1 through 12 months) from the **Refusal Period** drop-down to define when they should follow-up with the patient about enrolling in the Program. You can select **999** Months in the drop-down if they do not want to ask the patient about enrollment in this Program again.

Note: You will only see this field in the **Patient Enrollment** section for Programs with an **Enrollment Type** of **Patient Enrollment** (not for those with an **Enrollment Type** of **No Enrollment**).



Setting the Recurrence for Check-In Programs



A Check-In Program’s **Recurrence** field allows you to specify how often the Check-In will become due for patients enrolled in the Program. You can input a number from 0 to 999 in the **Recurrence** field.

A Check-In Program’s **Recurrence** field can be configured at a corporate root or facility level.

Setting the Due Date Reminder for Program Enrollments and Alerts

The **Due Date Reminder** can be set on **Patient Enrollment Alerts**, **Check-In Settings** and **Program Alerts**. The **Due Date Reminder** field (measured in days) allows you to define when an Alert will become visible in the **Clinical App** and **Task Queue**. For example, if you set this field to **4**, the Alert will appear in the **Clinical App** and **Task Queue** four days before the scheduled due date. If the **Due Date Reminder** field is set to zero (0), then any associated Alerts will appear in the **Clinical App** and **Task Queue** when the due date is reached. If the **Due Date Reminder** field is set to blank, any associated Alerts will always appear in the **Clinical App** and **Task Queue**.

Note: You will only see this field in the **Patient Enrollment** section for Programs with an **Enrollment Type** of **Patient Enrollment** (not for those with an **Enrollment Type** of **No Enrollment**).

Configure Hypertension Adherence Program

Patient Enrollment

REFUSAL PERIOD: 3 Months

DUE DATE REMINDER: 90 Days

Data Filter | Follow-Ups

Check-In Settings

RECURRENCE: [] Days

DUE DATE REMINDER: 5 Days

Follow-Ups

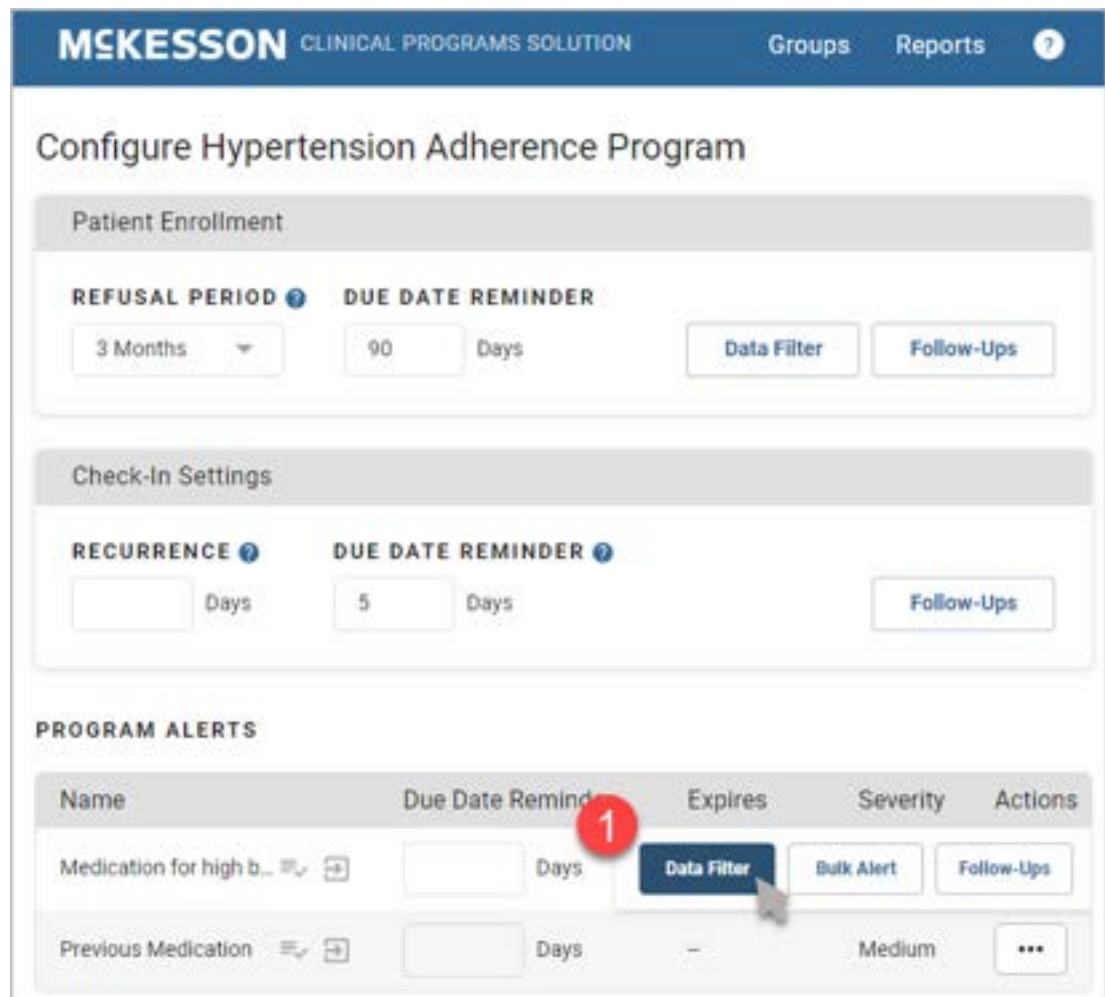
PROGRAM ALERTS

| Name | Due Date Reminder | Expires | Severity | Actions |
|--------------------------|-------------------|---------|----------|---------|
| Medication for high b... | [] Days | - | Medium | ... |
| Previous Medication | [] Days | - | Medium | ... |

Setting Up Data Filter, Bulk Alert and Follow-Ups for Program Alerts

Data Filter

Data filters need configured for what criteria needs to be met in order to display the **Program Alerts** set up in **CPS Program Builder**.



- 1) To get started, select the (...) under **Actions** and then select the **Data Filter** button next to the first Alert for which you want to edit the Data Filter.

MCKESSON CLINICAL PROGRAMS SOLUTION Groups Reports ?

DATA FILTER PREVIEW Test Data Filter

SELECTION CRITERIA

Add Data Filter Rules to Trigger Events

| (| Data | Attribute | Operator | Value |) | Connector |
|--------------------------|----------------------|-----------|----------------|--|----------------------|--|
| <input type="checkbox"/> | <input type="text"/> | Select ▾ | Select AL... ▾ | <input type="text" value="Enter Value"/> | <input type="text"/> | Select ▾ |
| | | | | | | <input type="button" value="Add Row"/> <input type="button" value="Delete Row"/> <input type="button" value="Undo Changes"/> |
| | | | | | | <input type="button" value="Save"/> <input type="button" value="Cancel"/> |

2) Select the **Add Row** button to add a row to the Data Filter. The Data Filters in this area work exactly like those that are set up for patient enrollment Alert. Follow the steps in either the [Simple Data Filter Example](#), [Complex Data Filter Example #1](#) or [Complex Data Filter Example #2](#) sections above to configure the Data Filter of each Program Alert.

Note: You will need to edit Data Filters separately for each Alert set up in **CPS Program Builder**.

3) Select the **Save** button to save the Data Filter.

Bulk Alert

The Bulk Alert feature allows you to generate Program Alerts for a specified list of patients without requiring prescription processing. Only Program Alerts configured for a given Self-Directed Program are available for use with Bulk Alert.

The screenshot shows the 'Configure Hypertension Adherence Program' interface. It is divided into three main sections:

- Patient Enrollment:** Includes a 'REFUSAL PERIOD' dropdown set to '3 Months' and a 'DUE DATE REMINDER' input set to '5 Days'. There are 'Data Filter' and 'Follow-Ups' buttons.
- Check-In Settings:** Includes a 'RECURRENCE' input (empty) and a 'DUE DATE REMINDER' input set to '5 Days'. There is a 'Follow-Ups' button.
- PROGRAM ALERTS:** A table with columns: Name, Due Date Reminder, Expire, Severity, and Actions.

| Name | Due Date Reminder | Expire | Severity | Actions |
|-------------------------|-------------------|--------|----------|---|
| Medication for high ... | [] Days | [] | Medium | Data Filter, Bulk Alert , Follow-Ups |
| Previous Medication | [] Days | - | Medium | ... |

- 1) To get started, select the (...) under **Actions** and then select the **Bulk Alert** button next to the first Alert for which you want to bulk Alert. The **Bulk Alert** window displays.

- 1) From the **Match Patient Using** drop-down select either **Patient Number** or **Patient Demographics**. **Patient Demographics** is the default.
- 2) Refer to the examples outlined in the window. Enter the desired patient information from a comma separated list (CSV) file into the field. It is recommended that you display the CSV file in a text-editing application such as Notepad, copy it, and then paste it directly into this field.



Important: Each line in the list must adhere to the following comma separated format: **Store Identifier, Patient Last Name, Patient First Name, Date of Birth, Due Date**.

Note the following specifics about these attributes:

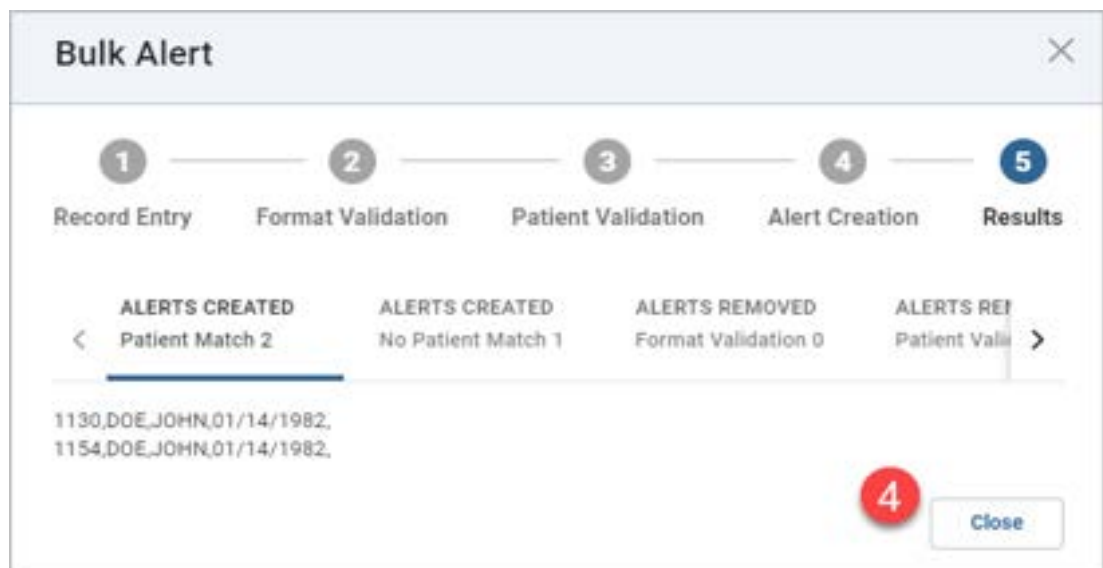
- **Store Identifier:** Required. Maximum length is 50 characters.
- **Patient Last Name:** Optional. Maximum length is 50 characters.
- **Patient First Name:** Optional. Maximum length is 50 characters.

- **Date of Birth** (mm/dd/yyyy format): Optional. Maximum length is ten characters.
- **Due Date** (mm/dd/yyyy format): Optional. Maximum length is ten characters. When a date is provided in the **Due Date** field, the due date for each bulk Alert will be set to the specified date. When the **Due Date** field is left blank, there will be no due date set on each bulk Alert. Any Alert that is generated via **Bulk Alert** will have an **Unread** Alert Status.

Bulk Alert accepts the following characters in the **Patient First Name** and **Patient Last Name** fields:

- Apostrophe (')
- Hyphen (-)
- Blank space ()
- Alphabetic (uppercase and lowercase)
- Numeric characters (0 - 9)
- Underscore (_)
- Period (.)

- 3) Select the **Bulk Alert** button. If there are any issues with the submission (for example, an error in formatting or when the selected Program is not enabled in a store specified in the input list), a warning window will display. You can make the suggested correction and retry. A success window will appear if there were no issues with the submission.



- 4) Select the **Close** button to close the window.

Follow-Ups

The Follow-Ups feature allows an admin to configure responses that can be used as standardized text to note action taken on the Program Alert. There is also a free text option. Configuration of the Follow-Up Responses can only be accessed at the Corporate Root level.

The screenshot displays the 'Configure Hypertension Adherence Program' interface. It features three main sections: 'Patient Enrollment', 'Check-In Settings', and 'PROGRAM ALERTS'. The 'Patient Enrollment' section includes a 'REFUSAL PERIOD' dropdown set to '3 Months' and a 'DUE DATE REMINDER' input field. The 'Check-In Settings' section includes a 'RECURRENCE' input field and a 'DUE DATE REMINDER' input field set to '5 Days'. The 'PROGRAM ALERTS' section is a table with columns for Name, Due Date Reminder, Expires, Severity, and Actions. A red circle with the number '1' highlights the 'Follow-Ups' button in the Actions column for the first alert, 'Medication for high...'. The second alert, 'Previous Medication', has a three-dot menu icon in its Actions column.

| Name | Due Date Reminder | Expires | Severity | Actions |
|------------------------|-------------------|---------|----------|-------------------------------------|
| Medication for high... | Days | | Medium | Data Filter, Bulk Alert, Follow-Ups |
| Previous Medication | Days | - | Medium | ... |

- 1) To get started, select the (...) under **Actions** and then select the **Follow-Ups** button next to the first Alert for which you want to add Follow-Up Responses. The **Follow-Ups** window displays.

- 2) In the field enter the text for the Follow-Up Response.
- 3) Enter a **Due Date Update** in days or leave it blank. When this **Follow-Up Response** is selected for an Alert, the Alert's due date is calculated by adding the number of days specified in the **Due Date Update** field to the current calendar date. If the Alert's due date should not be automatically updated leave the **Due Date Update** field blank.
- 4) Select the **Save** button to save the Follow-Up Response.

To add additional Follow-Up Responses, select the **Add Row** button and a new row will be added to the bottom of the list.

To edit responses follow the steps in [Editing Follow-Ups](#) below.

Editing Follow-Ups

Follow-Ups

Configure Follow-Up Responses for: Patient Enrollment

| Follow-Up Response | Due Date Update |
|---|-----------------|
| <input type="checkbox"/> Do you take a medication for hypertension? | 10 Days |
| <input checked="" type="checkbox"/> Have you taken this medication or another medication bef... | Days |
| <input type="checkbox"/> Do you want more information about hypertension? | Days |

Add Row Delete Row

Save Cancel

- 1) Edit a Follow-Up Response by selecting the specific response and editing the text.
- 2) To delete one or more Follow-Up Responses check the check-box next to the response you want to delete and select the **Delete Row** button.
- 3) Additionally, you can use the arrows to move the position of a Follow-Up Response up or down.
- 4) Select the **Save** button to save the edited Follow-Up Responses.

Bulk Enrolling Patients into Self-Directed Program

Bulk Enroll is a quick way to enroll a large number of patients into the Program by using patient information from a comma separated list (CSV file).



- 1) Enter the desired patient information from a comma separated list (CSV) file into the field. It is recommended that you display the CSV file in a text-editing application such as Notepad, copy it, and then paste it directly into this field.

The required information in this field depends on whether or not you are completing bulk enrollment for a Program configured to generate Alerts on enrollment. The image above shows what the configuration window will look like when the Program is configured to generate Alerts on enrollment.

If you are completing a bulk enrollment for a Program that is not configured to generate Alerts on enrollment, each line in the list must follow this comma separated format: **Patient Number, Store Identifier.**

If you are completing a bulk enrollment for a Program configured to generate an Alert on enrollment, each line in the list must follow this comma separated format: **Patient Number, Store Identifier, Patient Last Name, Patient First Name, Date of Birth, Phone Number, Generate On Enrollment Due Date, Check-in Due Date.**

Note the following **specifics about these attributes:**

- **Patient Number:** Required. Numeric characters only. Maximum length is 18 characters.
- **Store Identifier:** Required. Maximum length is 50 characters.
- **Patient Last Name:** Required. Maximum length is 50 characters.
- **Patient First Name:** Required. Maximum length is 50 characters.

- **Date of Birth** (mm/dd/yyyy format): Required. Maximum length is ten characters.
- **Phone Number** (##### format): Optional. Numeric characters only. Maximum length is ten characters. Phone Number area codes cannot start with the numeral “1”.
- **Generate On Enrollment Due Date** (mm/dd/yyyy format): Optional. Maximum length is ten characters. When a date is provided in the **Generate On Enrollment Due Date** field, the due date for each Generate On Enrollment Alert configured for that Program will be set to the specified date. When the **Generate On Enrollment Due Date** field is left blank, there will be no due date set on each **Generate On Enrollment** Alert configured for that Program. Any Alert that is configured to generate on enrollment will have an **Unread** Alert Status.
- **Check-In Due Date** (mm/dd/yyyy format): Optional. Maximum length is ten characters. When a date is not provided the current date is used. If **Generate On Enrollment Due Date** is not configured this due date is ignored.

Note: Bulk Enrollment accepts the following characters in the **Patient First Name** and **Patient Last Name** fields:

- Apostrophe (')
- Hyphen (-)
- Blank space ()
- Alphabetic (uppercase and lowercase)
- Numeric characters (0 - 9)
- Underscore (_)
- Period (.)

- 2) Select the **Bulk Enroll** button. If there are any issues with the submission (for example, an error in formatting), a warning window will display. You can make the suggested correction and retry the bulk enrollment. A success window will appear if there were no issues with the submission.

Note: In the **Program Alerts** section, a **Generate On Enrollment** icon will be displayed next to any Alerts that are configured to generate on enrollment, as shown in the image below. If the Program is not configured to generate an Alert on enrollment, different help text will display in the **Bulk Enrollment** field.

MCKESSON CLINICAL PROGRAMS SOLUTION Groups Reports ?

Configure Hypertension Adherence Program

Patient Enrollment

REFUSAL PERIOD ?

DUE DATE REMINDER

 Days

Check-In Settings

RECURRENCE ?

 Days

DUE DATE REMINDER ?

 Days

PROGRAM ALERTS

| Name | Due Date Reminder | Expires | Severity | Actions |
|---|--|---------|----------|------------------------------------|
| Medication for high b... <input type="checkbox"/> | <input type="text" value="Generate on Enrollment type"/> | - | Medium | <input type="button" value="..."/> |
| Previous Medication <input type="checkbox"/> | <input type="text"/> Days | - | Medium | <input type="button" value="..."/> |

Saving Program Configuration

Once you finish configuring Patient Enrollment, Check-In Settings, Data Filters and Follow-Ups, select the **Save** button.

Now you're ready to enable the Self-Directed Program.

Go to [Chapter 6: Enabling Self-Directed Programs](#) to finish the Program.

6. Enabling Self-Directed Programs

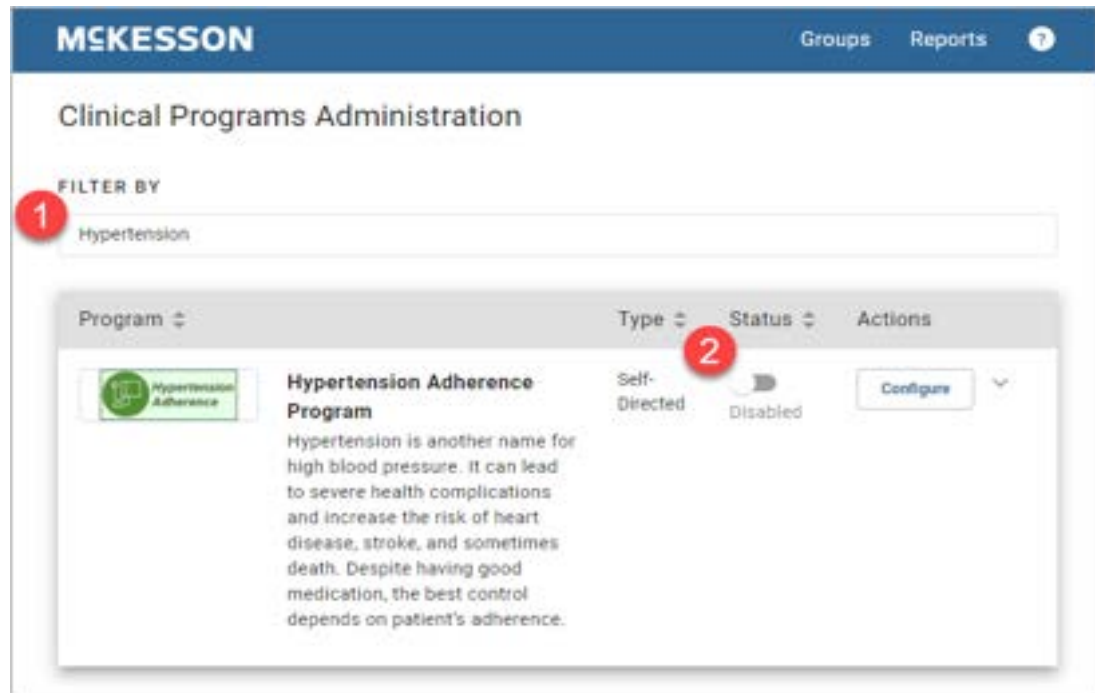
After configuring a Self-Directed Program, the next step is to enable it.

Steps to Enabling Self-Directed Programs

- ["Enabling Self-Directed Programs" on page 68](#)
- ["Enabling a Preconfigured Program" on page 69](#)

Enabling Self-Directed Programs

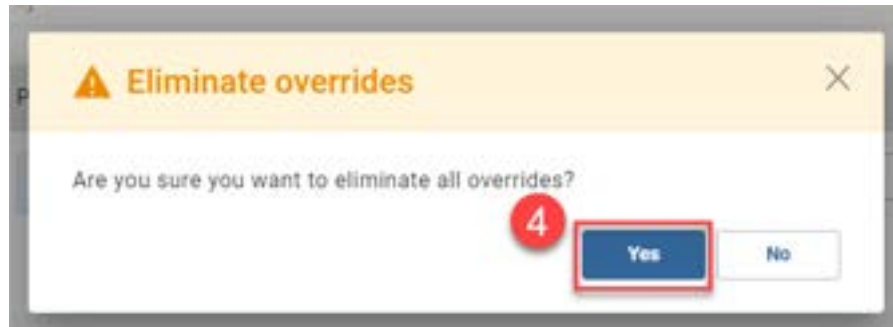
After you have configured your Self-Directed Program the last step is to enable it, so that it can be utilized by pharmacy staff. Until the Program is enabled, Alerts and Enrollments will not be seen by users. To enable the Program, navigate to **CPS Program Admin**.



- 1) Type the Program name into the **Filter By** text box. If several names include the same character string, they will all show in the list. The more characters that are entered into the filter, the fewer entries that will be contained in the list.
- 2) Once the Program displays in the list, toggle the status to **Enabled**.



- 3) Select **Yes** to enable the Program.



4) Select **Yes** to eliminate overrides.

Now the Program is ready to use in the pharmacy. Alerts will appear in the **Clinical App** (see [Chapter 7: Viewing Alerts in the Clinical App](#)) and in the **Task Queue** (see [Chapter 9: CPS Task Queue](#)) when the filter criteria have been met.

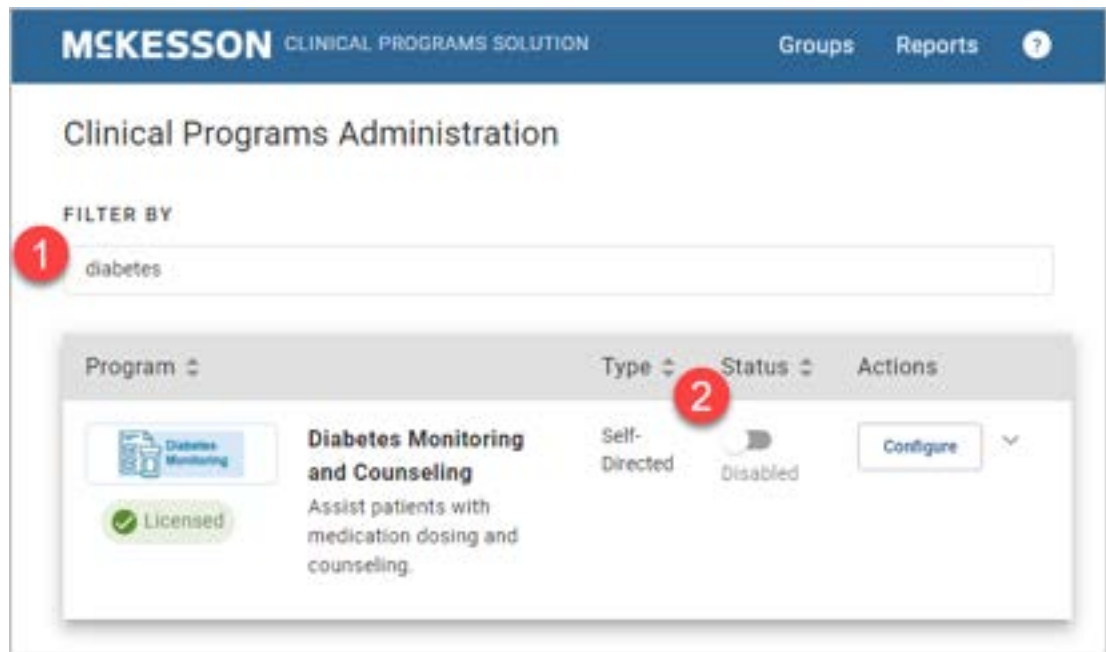
Enabling a Preconfigured Program

CPS preconfigured Programs are turn key Programs that provide pharmacies revenue generating clinical opportunities, additional front-end sales of highly profitable over-the-counter (OTC) products and repeat business.

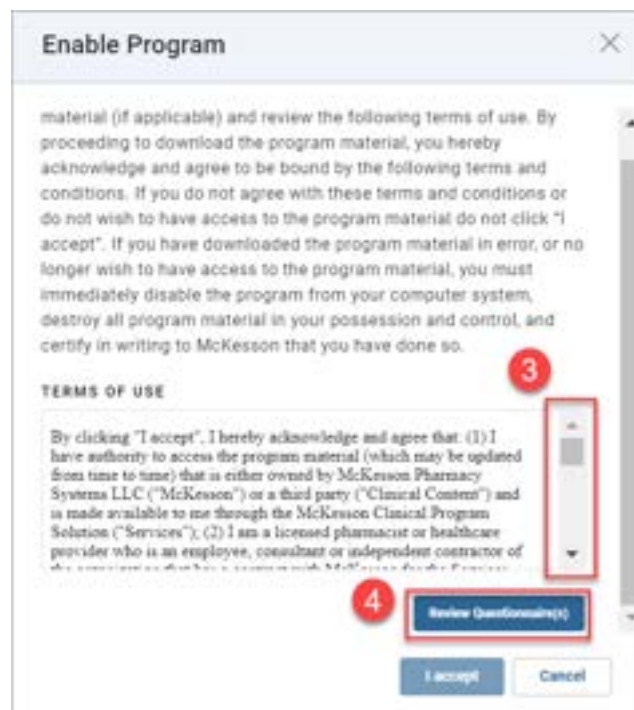


Important: Preconfigured Programs are only available with the CPS Premium Subscription. Please contact your Account Executive for more information.

When enabling a preconfigured Program at either the corporate root or facility level, you will be required to acknowledge and agree to the Program's Terms of Use and questionnaire(s), if applicable.



- 1) Type the Program name into the **Filter By** text box. If several names include the same character string, they will all show in the list. The more characters that are entered into the filter, the fewer entries that will be contained in the list.
- 2) Once the Program displays in the list, toggle the status to **Enabled** and the **Enable Program** window displays.



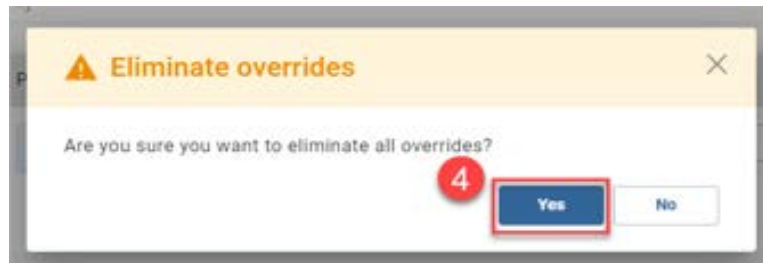
- 3) The **Enable Program** window will display with the Terms of Use for the Program. Use the vertical scrollbar to review the instructions and entire Terms of Use.

- 4) Select the **Review Questionnaire(s)** button. The questionnaire(s) will open for your review.

- 5) Use the vertical scrollbar to review the questionnaire(s) associated to the Program. When finished reviewing, select the **Accept** button.

- 6) To acknowledge and agree to the Program’s Terms of Use and questionnaire(s), select the **I accept** button to enable the Program. If you do not want to proceed with enabling the Program, select the **Cancel** button.

Note: The **Review Questionnaire(s)** button will only display if the Program has associated questionnaire(s). Steps 4 and 5 will not be applicable when the Program does not have at least one associated questionnaire.



When enabling a preconfigured Program at the corporate root level, you will be prompted with the **Eliminate overrides** window after selecting the **I accept** button in the **Enable Program** window.

Now the Program is ready to use in the pharmacy. Alerts will appear in the **Clinical App** (see [Chapter 7: Viewing Alerts in the Clinical App](#)) and in the **Task Queue** (see [Chapter 9: CPS Task Queue](#)) when the filter criteria have been met.

7. Viewing Alerts in the Clinical App

Once a Program is enabled in your pharmacy, you will begin to see Alerts for the Program in the **Clinical App** when a patient is in context. The **Clinical App** will provide access to both active and historical Alerts for the patient. This chapter will outline how Alerts display during workflow, and the actions that can be taken on these Alerts.

For this example, we are using a Program which was set up to send enrollment Alerts upon the filling of a certain NDC number, and other Alerts once the patient has been enrolled and subsequently refills the same NDC. In this scenario, as we fill an Rx with the a matching NDC number from our filter and move it forward in workflow, our an enrollment Alert will be triggered.

Note: During downtime processing or a network outage, the **Clinical App** will display a communication error. This error message will disappear when the network outage is resolved.

Actions You Can Take on Alerts in the Clinical App

- ["Viewing Programs and Alerts" on page 74](#)
 - ["Viewing Enabled Programs in Clinical Snapshot" on page 74](#)
 - ["Accessing the Program's Alerts" on page 77](#)
 - ["Accessing the Check-In Program-Level View" on page 80](#)
 - ["Viewing a Patient's CPS Alerts in the Clinical App Using EnterpriseRx" on page 82](#)
 - ["Viewing a Patient's CPS Alerts in the Clinical App Using Pharmaserv" on page 83](#)
- ["Clinical App Alerts Tab" on page 84](#)
 - ["Enrolling a Patient" on page 86](#)
 - ["Refusing Patient Enrollment" on page 87](#)
 - ["Accessing and Completing an Alert's Associated Questionnaire" on page 88](#)
 - ["Adding Follow-Ups" on page 89](#)
 - ["Changing an Alert's Severity, Expiration Date or Assignee" on page 93](#)

- "Adding an Alert" on page 100
- "Resolving an Alert" on page 101
- "Printing an Alert" on page 102
- "Clinical App History Tab" on page 103
 - "Filtering the Historical Alerts" on page 104
 - "Viewing and Reopening Questionnaires" on page 105

Viewing Programs and Alerts

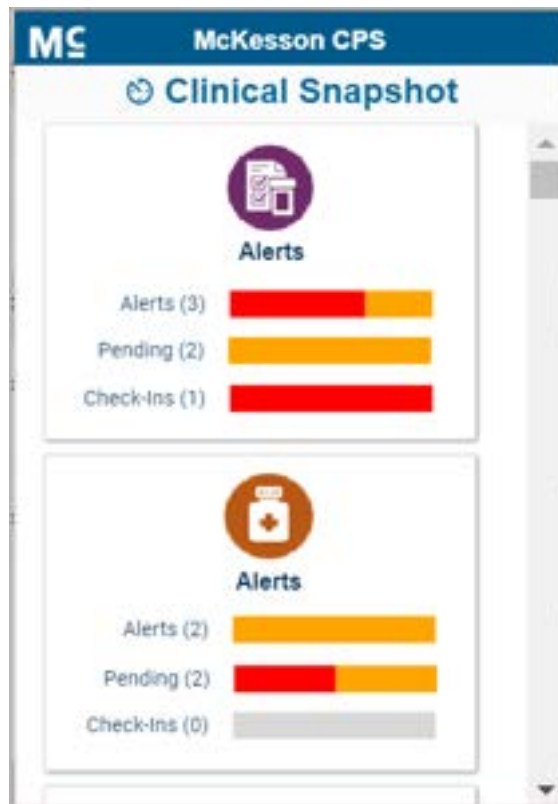
Viewing Enabled Programs in Clinical Snapshot

MS

McKesson CPS

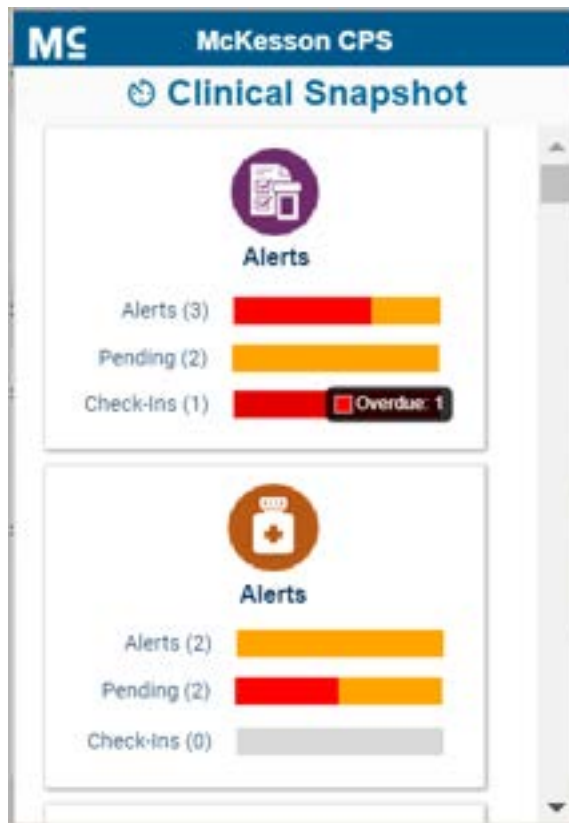
When a patient is not in context in the Pharmacy Management System, the Clinical Snapshot will display within the **Clinical App**. The Clinical Snapshot provides you with a way to quickly check the status of your Programs at a high level. When a Vendor or Self-Directed Program is enabled in the logged in store, the Program will display within the Clinical Snapshot, along with the corresponding Alerts, Pending Alerts, and Check-In counts.

Note: If you are viewing the Clinical Snapshot when a patient is brought into context, the **Clinical App** will automatically put the patient into context to ensure that Alerts are not missed for the patient.

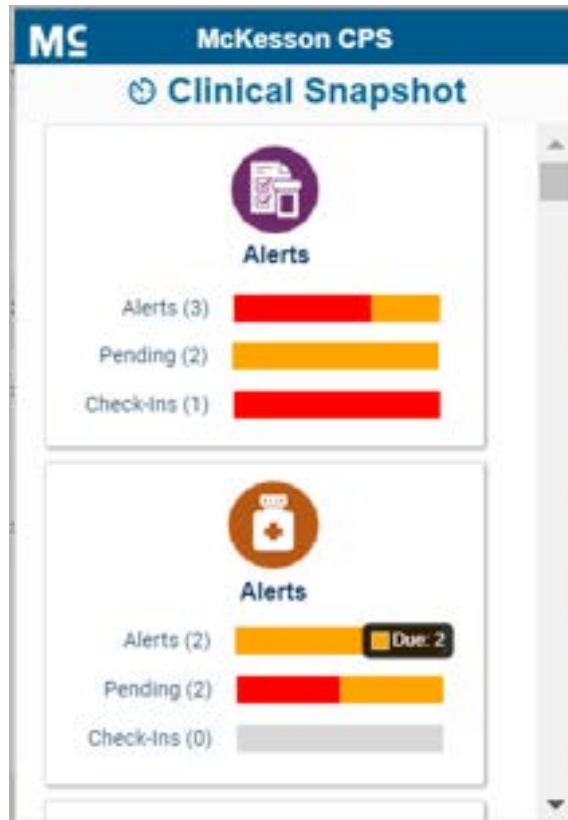


Note: If no Programs are enabled in the logged in store, the Clinical Snapshot will display the following message: “There are no programs enabled in this facility.”

To provide insight into a Program's overall status, Alerts, Pending Alerts and/or Check-Ins with a due date in the past will display as red within the accompanying graph. And when you hover over the red section, the total count of past due Alerts, Pending Alerts or Check-Ins will display.



Similarly, Alerts, Pending Alerts and/or Check-Ins without a due date or due within the configured Due Date Reminder range will display as orange within the accompanying graph. And when you hover over the orange section, the total count of Alerts, Pending Alerts or Check-Ins without a due date or due within the configured Due Date Reminder range will display.



To refresh the Overdue and Due counts, select the Clinical Snapshot title bar.



Accessing the Program's Alerts

When you select a Program's Alerts count or accompanying graph within the Clinical Snapshot, the **Task Queue** will open in a new window and the **Task Queue** will be filtered for the selected Program and logged in store.

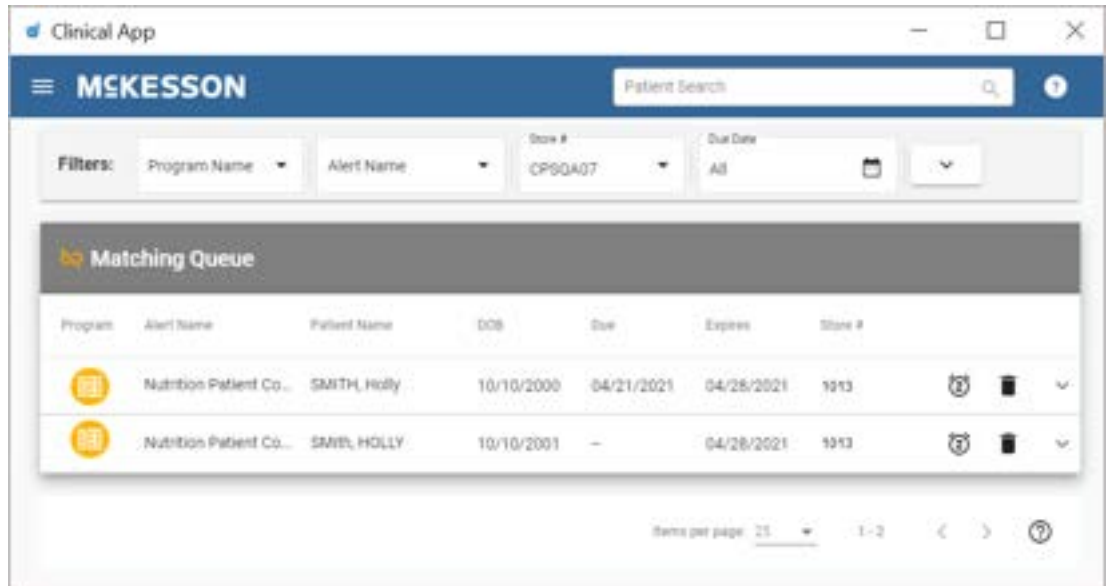
The screenshot displays the McKesson Task Queue interface. At the top, there is a search bar labeled 'Patient Search'. Below it, a 'Filters' section includes dropdown menus for 'Program Name' (set to 'Hypertension A...'), 'Alert Name', 'Due Date', and 'Assignee', along with a 'Clear' button. The main area is titled 'Task Queue' and features a 'Next Available' icon and a 'Show Available Only' toggle. A table lists the tasks with columns for Program, Alert Name, Patient Name, DOB, Due, Assignee, Status, Expires, Store #, and Last Updated. The table contains five rows of medication alerts. At the bottom, there is a pagination control showing 'Items per page: 25' and page navigation arrows.

| Program | Alert Name | Patient Name | DOB | Due | Assignee | Status | Expires | Store # | Last Updated |
|---------------|---------------|--------------|------------|-----|----------|-------------|------------|---------|--------------------|
| Medication... | Medication... | Smith, Jo. | 01/01/1960 | - | - | In Progress | 04/10/2021 | 1130 | 04/06/2021 2:26 PM |
| Medication... | Medication... | Smith, Ja. | 01/12/1990 | - | - | Not Started | 04/13/2021 | 1130 | - |
| Medication... | Medication... | Thomaso | 11/12/1990 | - | - | Not Started | 04/13/2021 | 1130 | - |
| Medication... | Medication... | Taylor, S. | 01/01/1982 | - | - | Not Started | 04/13/2021 | 1130 | - |
| Medication... | Medication... | Jordan, D. | 11/11/2000 | - | - | Not Started | 04/14/2021 | 1130 | - |

Note: When the **Task Queue** is accessed via the Clinical Snapshot, the Overdue and Due counts in the Clinical Snapshot will periodically refresh.

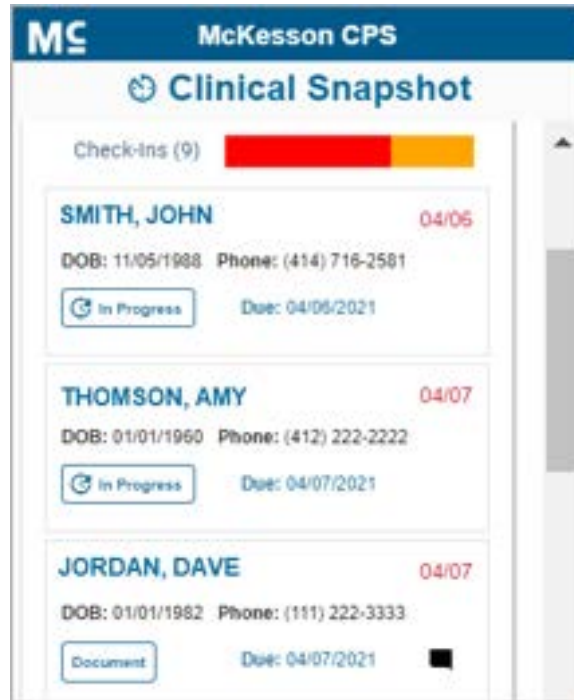
Accessing the Program’s Pending Alerts

When you select a Program’s Pending count or accompanying graph within the Clinical Snapshot, the **Task Queue** will open in a new window. To access the Pending Alerts, navigate to the **Matching Queue** using the CPS menu option (☰) in the upper-left corner. Select **Matching Queue** and the queue will open and will display all Pending Alerts for the logged in facility. Use the Program Name filter to filter the list of Pending Alerts as needed.



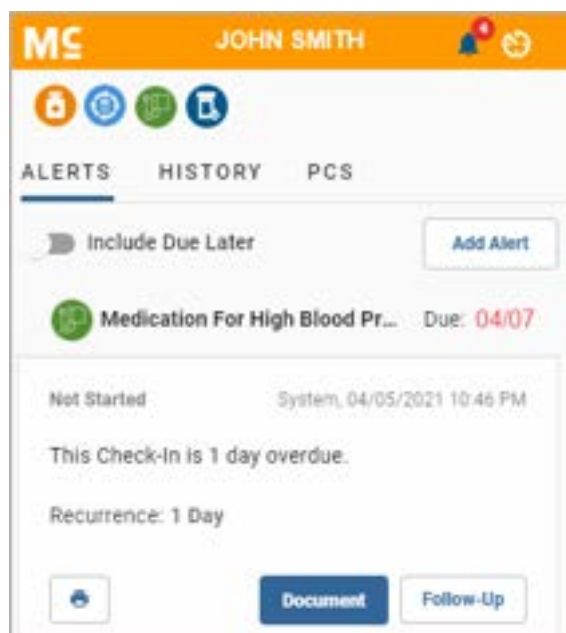
Accessing the Check-In Program-Level View

When you select a Program’s Check-Ins count or accompanying graph within the Clinical Snapshot, the Check-In Program-Level view will display and be sorted first by due date (past due to future due), then alphabetically by Patient Name.



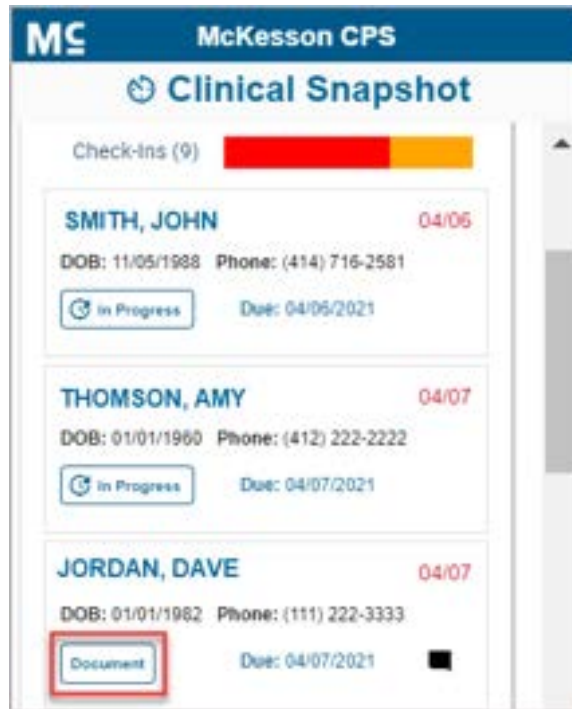
Note: At most, 50 Check-In notifications will display in the Check-In Program-Level view.

While viewing the Check-In Program-Level view, you can put a patient into context by selecting the patient’s name.



When you are finished reviewing the patient’s Check-In, select the **Clinical Snapshot** icon (📷) in the upper-right corner to return to the Check-In Program-Level view.

Accessing a Check-In Notification’s Questionnaire in the Check-In Program-Level View



From the Check-In Program-Level view, you can access a Check-In notification’s associated questionnaire via the **Document** button. Select the **Document** button to open the questionnaire.

Please refer to the section on ["Accessing and Completing an Alert’s Associated Questionnaire" on page 88](#) for information about completing a questionnaire.

Note: If the questionnaire is in process the **Document** button is updated to an **In Progress** button.

Modifying a Check-In Notification’s Due Date in the Check-In Program-Level View

You can modify a Check-In notification’s due date via the **Due** field directly from the Check-In Program-Level view.

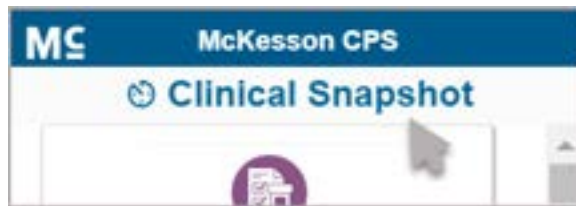
- 1) Hover over the Due field and select the **Edit** icon (✎) when it appears.
- 2) In the **Due** field either select the **Calendar** icon (📅) to use the pop-up calendar to select an updated date or enter the updated date directly into the field in mm/dd/yyyy format.



Important: A due date can be, at most, 999 days in the future. If you enter a due date beyond the 999 days maximum, the system will set the due date to the maximum date.

- 3) Select the **Check Mark** icon to save your change, or the **X** icon to cancel your change. After you save a due date change, the due date for the patient’s next Check-In will be immediately updated to the selected date and the Check-In Program-Level view will be refreshed. A **Comment** icon (■) displays when there is a due date change associated with the current instance of the Check-In.

To return to the Clinical Snapshot’s main window, select the Clinical Snapshot title bar in the Check-In Program-Level view.



Viewing a Patient’s CPS Alerts in the Clinical App Using EnterpriseRx

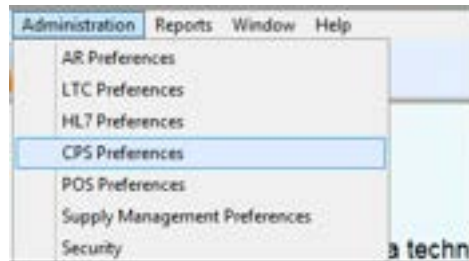
When a patient is brought into context in EnterpriseRx, the **Clinical App** will display Alerts for that patient. If the patient has any Alerts that are past due, due within the configured **Due Date Reminder** range for the Alert, or without a defined due date, the **Clinical App** header will update to orange and the count of Alerts will display (shown below). In addition, the **Clinical App** will automatically expand from the docked view when the patient in context has a High Severity Alert available.



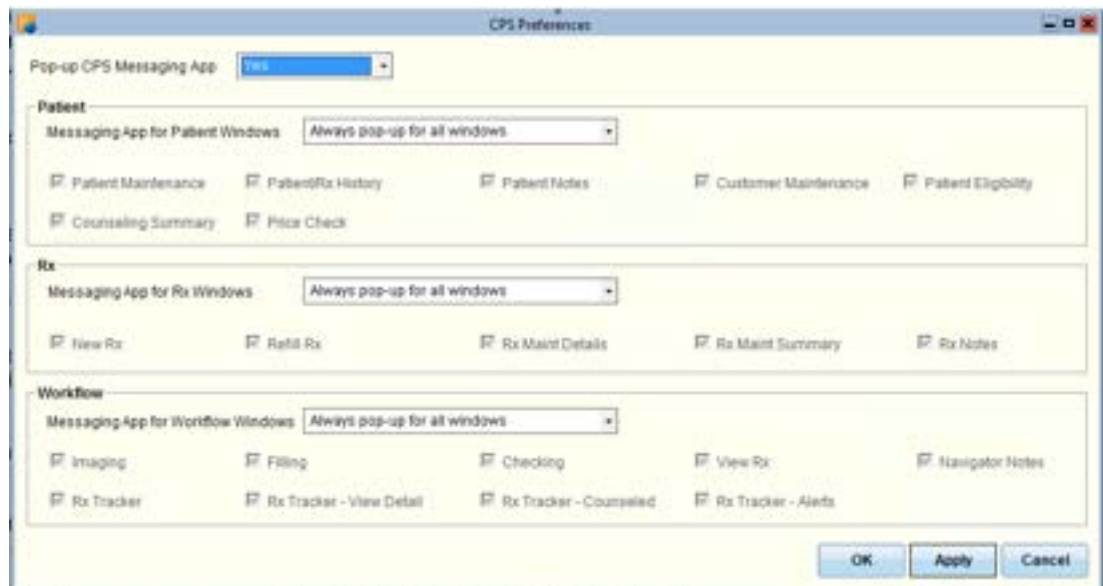
Select the orange **Clinical App** header to view the patient’s available Alerts. You can also select the arrow button (↕) to the right of the **Clinical App** header to dock/undock the **Clinical App**. The **Clinical App** displays in a separate pop-up window that you can move and resize for easier viewing.

Viewing a Patient’s CPS Alerts in the Clinical App Using Pharmserv

If you are using Pharmserv, you can select the windows where Alerts will be displayed. From the **Administration** menu, select **CPS Preferences**.

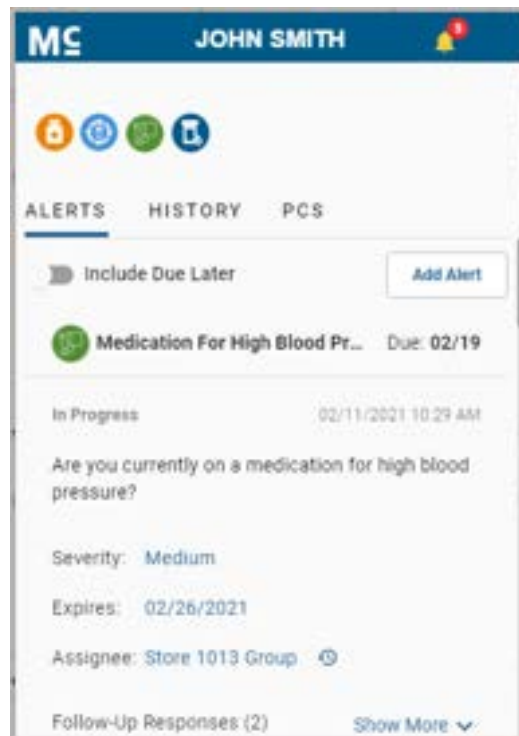


From the **CPS Preferences** window, you can enable or disable CPS pop-ups. In addition, you can select the windows that the pop-ups will be displayed in. When the patient in context is displayed in any of the selected windows, the pop-up Alerts will be displayed automatically.

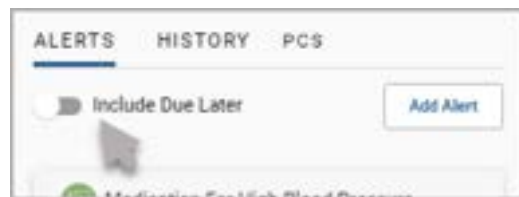


Clinical App Alerts Tab

The **Alerts** tab provides you with the ability to quickly view and act upon Alerts for the patient. The title bar for each Alert will display the Program or Alert name, aligned left, and the due date aligned right, if applicable. If the name does not fit in the Alert's title bar, an ellipse (...) will display and you can hover over the title bar to view the full Program/Alert name.



By default, Alerts that have a due date in the past, within the configured **Due Date Reminder** range for the Alert, or without a defined due date display in the **Alerts** tab. To see Alerts that have a due date in the future, outside of the configured **Due Date Reminder** range, use the **Include Due Later** toggle.



Alerts will display within the **Alerts** tab based on the following sort order:

- 1) Due date (past due to future due)
- 2) Alert Severity (High, Medium, Low)
- 3) Received date (newest to oldest)

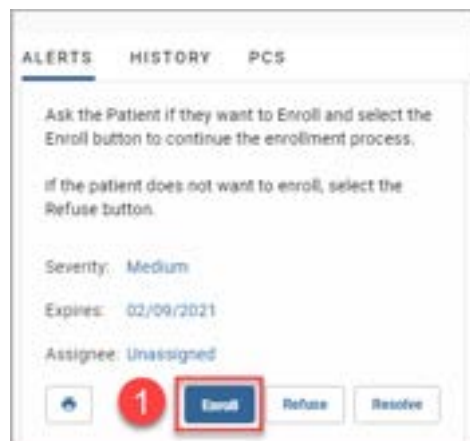
Actions You Can Take in the Alerts Tab

You can take the following actions to manage Alerts:

- ["Enrolling a Patient" on page 86](#)
- ["Refusing Patient Enrollment" on page 87](#)
- ["Accessing and Completing an Alert's Associated Questionnaire" on page 88](#)
- ["Adding Follow-Ups" on page 89](#)
- ["Changing an Alert's Severity, Expiration Date or Assignee" on page 93](#)
- ["Adding an Alert" on page 100](#)
- ["Resolving an Alert" on page 101](#)
- ["Printing an Alert" on page 102](#)


Enrolling a Patient

To enroll a patient into a Program follow the steps below.



- 1) Select the **Enroll** button in the Alert. If a questionnaire is required for enrollment, the questionnaire will open in a separate window, similar to the questionnaire below.

- 2) When the questionnaire displays, complete the required fields.

Note: A **Print** icon () will also display within the questionnaire if printing is available in your system.

- 3) Select the **Resolve** button at the bottom of the window to submit your questionnaire responses and complete the enrollment. The Alert will be automatically resolved upon selection of the **Resolve** button in the questionnaire.

You can also use the **Save Progress** button if you want to save your changes but you are not ready to complete the questionnaire at this time. When you access the questionnaire again, you will see the changes you already entered.

Note: Enrolling a patient in a Program will override any setting in place in the Pharmacy Management System where the user has set a “Do Not Contact” flag for the patient.

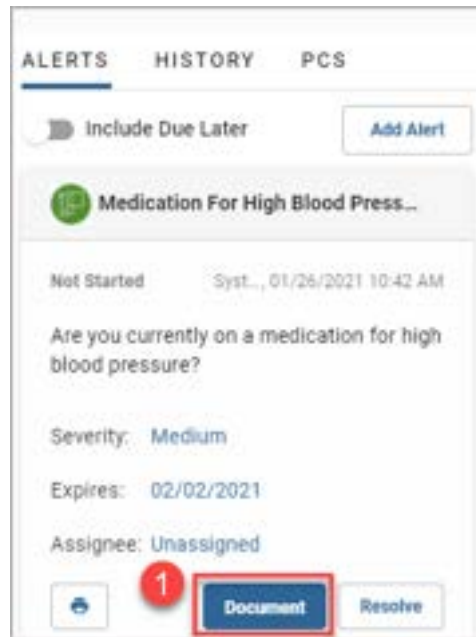
Refusing Patient Enrollment

If the patient is asked about enrolling in the Program and they refuse, select the **Refuse** button. A new enrollment Alert will not be generated for this patient for this particular Program until the refusal time period set up in **CPS Program Admin** has been reached.

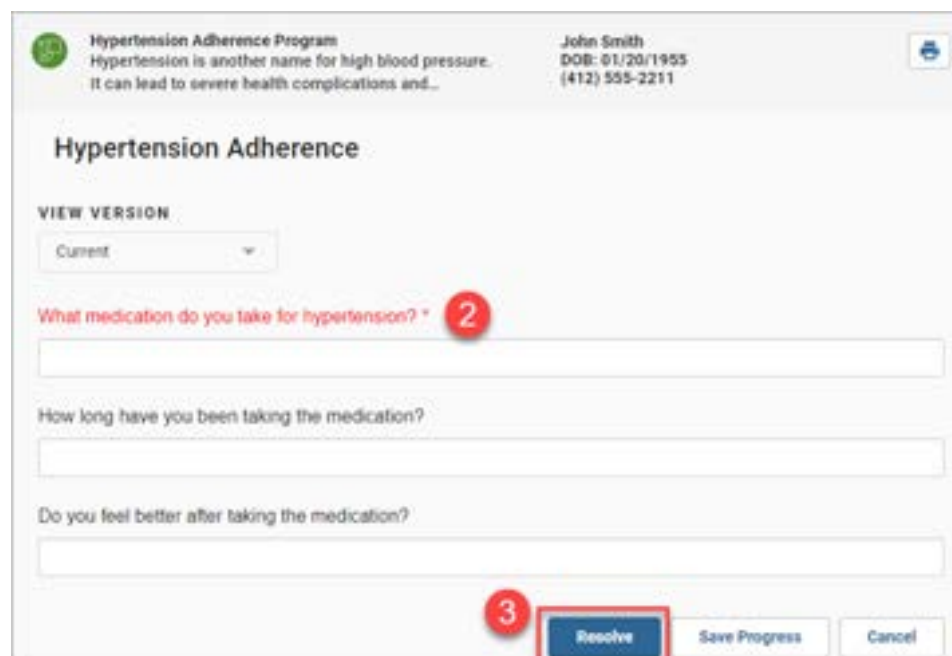


Accessing and Completing an Alert's Associated Questionnaire


Depending on the Alert, you may be required to complete a questionnaire. Follow the steps below to access and complete a questionnaire.



- 1) Select the **Document** button to open the Alert's questionnaire. The questionnaire will open in a separate window.



- 2) When the questionnaire displays, complete the required fields.

Note: A **Print** icon () will also display within the questionnaire if printing is available in your system.

- 3) Select the **Resolve** button at the bottom of the window to submit your questionnaire responses and resolve the Alert.

You can also use the **Save Progress** button if you want to save your changes but you are not ready to complete the questionnaire at this time. When you access the questionnaire again, you will see the changes you already entered.

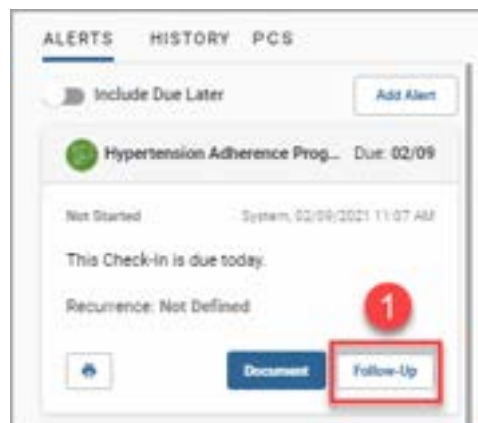
Additional actions available in a questionnaire are outlined in [Chapter 11: Alert's Questionnaire](#).

Adding Follow-Ups

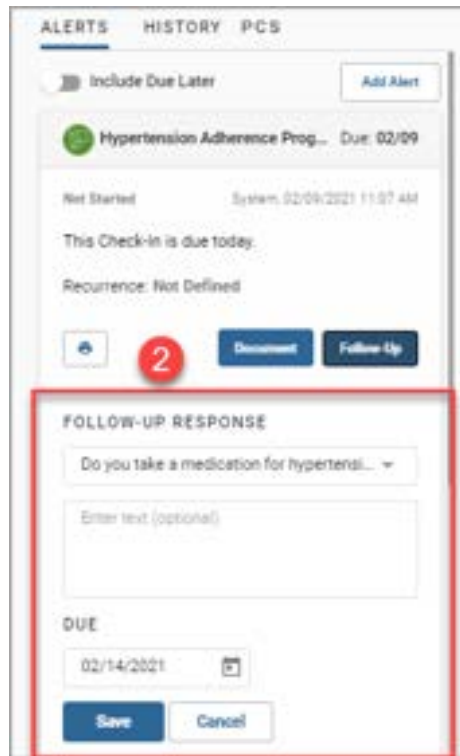
The **Follow-Up** button in an Alert allows you to leave a response to remind yourself, or someone else, to follow-up later. This may be useful in situations where you could not reach the patient and it is necessary for you to follow-up again sometime in the future. The **Follow-Up** button also allows you to change the due date for the Alert.

Note: Follow-Ups can also be added to the Alert from the questionnaire if applicable. The Follow-Ups from both the Alert or the questionnaire are displayed within the Alert. Please refer to [Chapter 11: Alert's Questionnaire](#) for information about adding Follow-Ups from the questionnaire.

Follow the steps below for adding Follow-Ups.



- 1) Select the **Follow-Up** button in the Alert and a Follow-Up input area displays within the Alert.

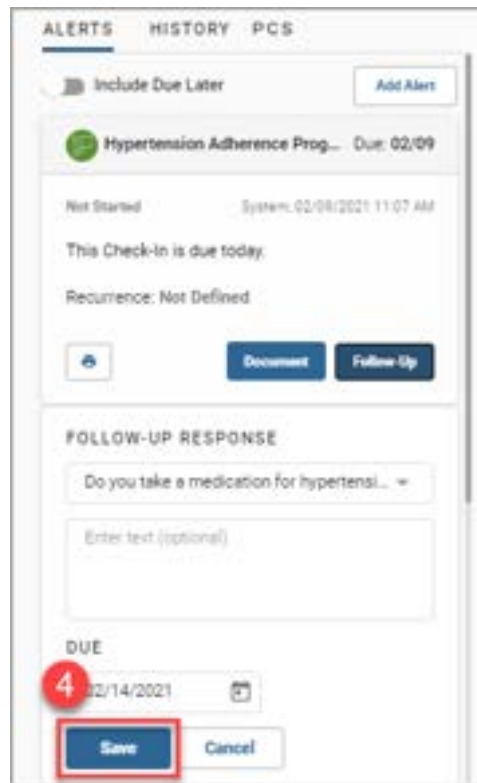


- 2) Enter the information for the Follow-Up. From the **Follow-Up Response** drop-down select a pre-defined response or select **Custom** to enter custom text. When a pre-defined response is selected, additional custom text can also be added to the Follow-Up. If there are no pre-defined responses for the Alert, **Custom** will be selected by default. In this example, a Follow-Up Response is configured for the Alert.



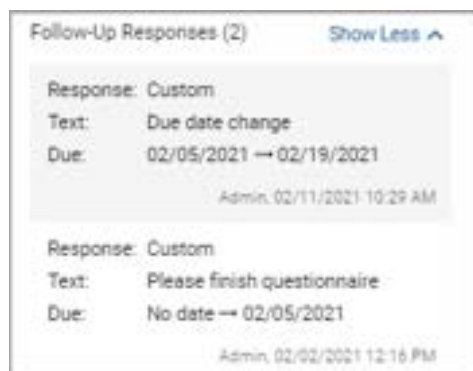
- 3) In the **Due** field either select the **Calendar** icon (📅) to use the pop-up calendar to select an updated due date or enter the updated due date directly into the **Due** field in mm/dd/yyyy format.

Note: After an Alert's due date has been modified, the due date change will be reflected in the title bar of the the Alert and the Alert's status will be updated to **In Progress**.



- 4) Select the **Save** button to save the Follow-Up Response. You can discard a Follow-Up by selecting the **Cancel** button.

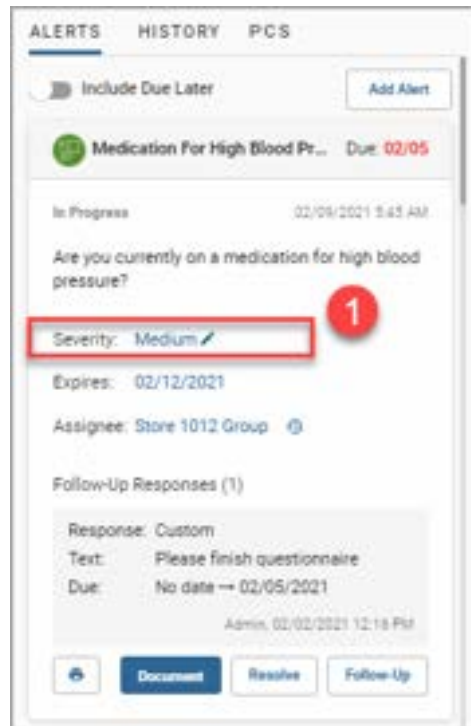
Note: The most recent Follow-Up Response displays within the Alert. You can select **Show More** to see any additional Follow-Up Responses. Select **Show Less** to collapse the responses.




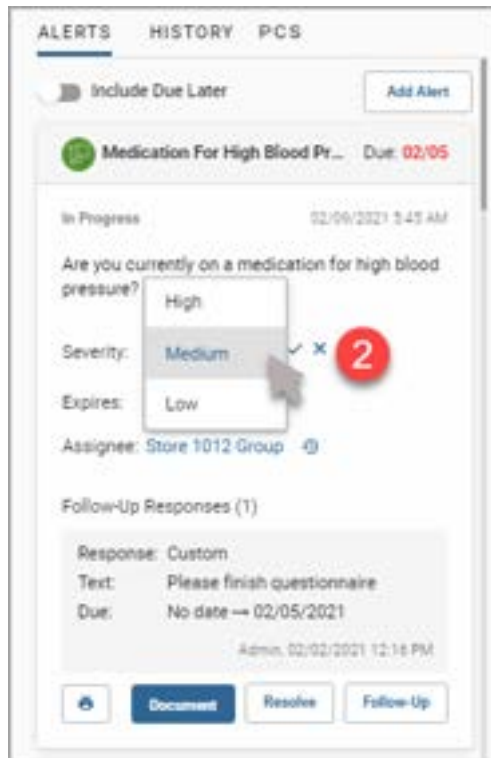
Changing an Alert's Severity, Expiration Date or Assignee

The **Severity**, **Expires** date and **Assignee** of an Alert can be edited within the Alert. Follow the steps below to edit these attributes.

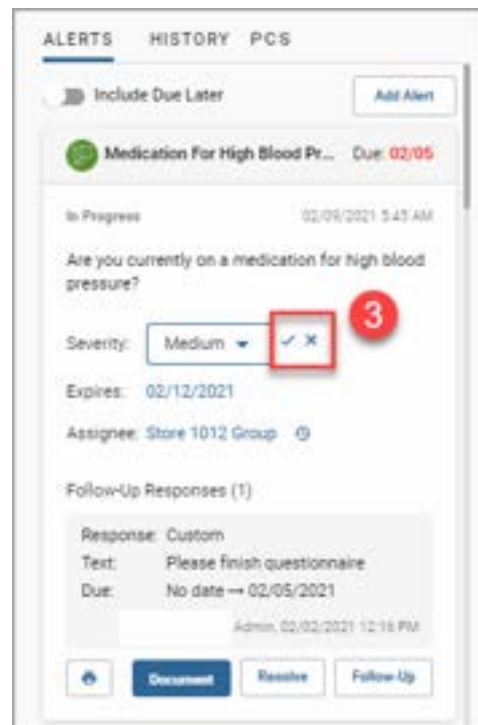
Editing an Alert's Severity



- 1) Hover over the Alert's **Severity** field and select the **Edit** icon () when it appears or continue to hover for several seconds and a **Click to edit** pop-up will appear.

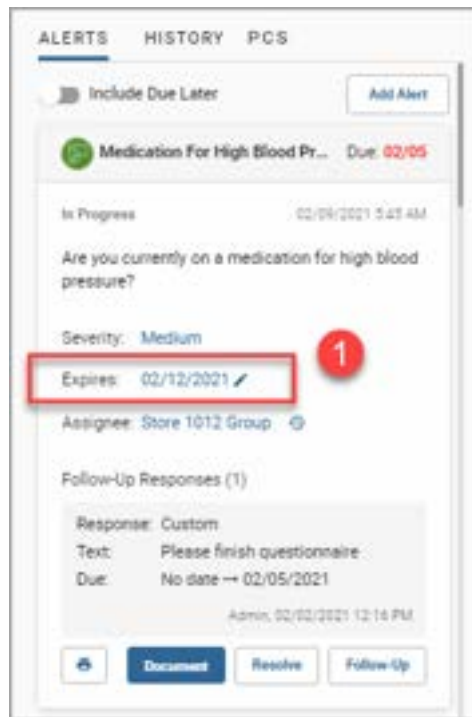



2) Select a new severity **High**, **Medium**, or **Low** from the drop-down.

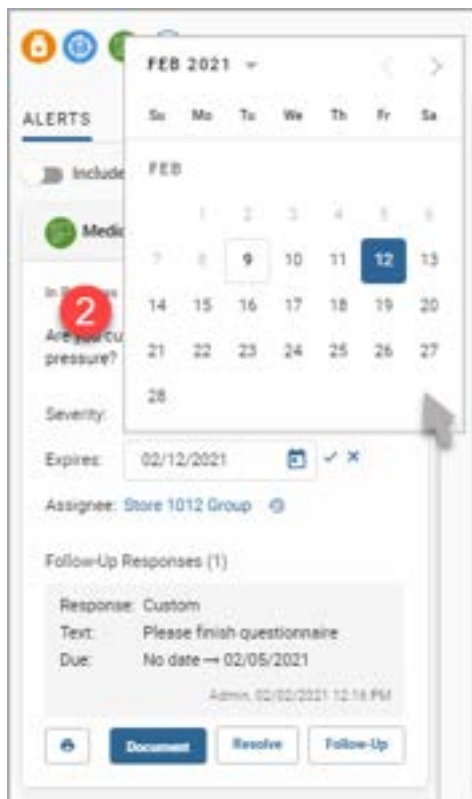


3) Select the **Check Mark** icon to save your change, or the **X** icon to cancel your change.

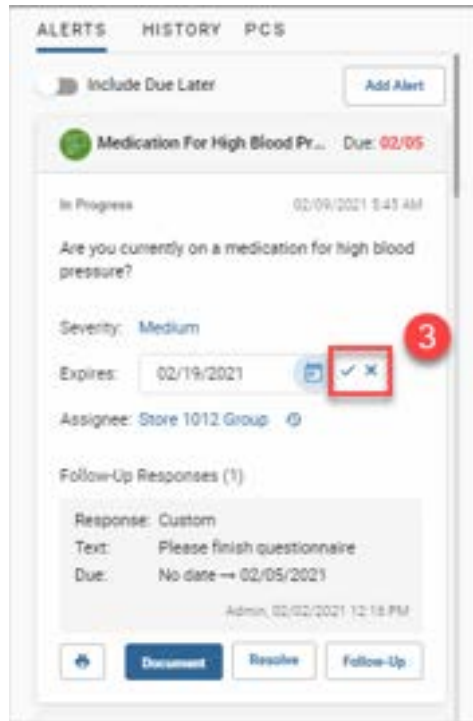
Editing an Alert's Expires Date



- 1) Hover over the Alert's **Expires** field and select the **Edit** icon () when it appears or continue to hover for several seconds and a **Click to edit** pop-up will appear.



- 2) In the **Expires** field either select the **Calendar** icon (📅) to use the pop-up calendar to select an updated expires date or enter the updated date directly into the **Expires** field in mm/dd/yyyy format.

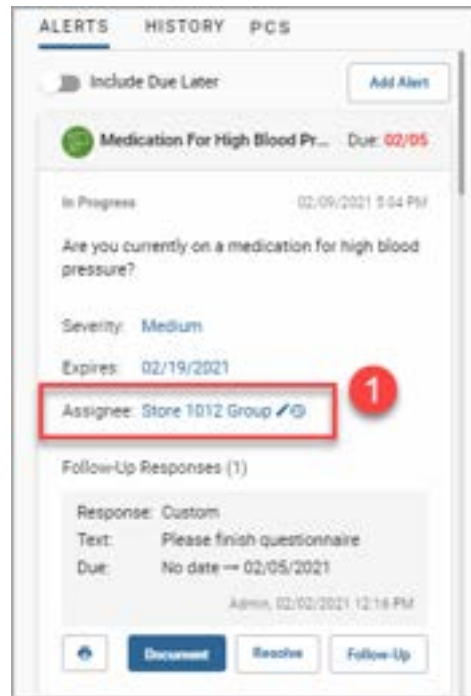



- 3) Select the **Check Mark** icon to save your change, or the **X** icon to cancel your change.

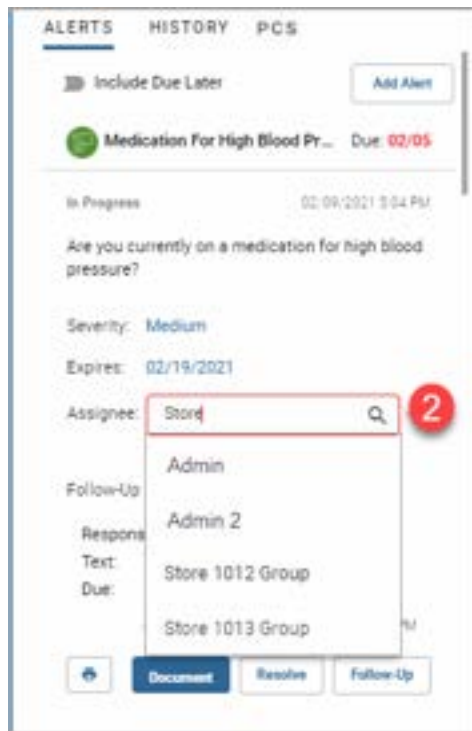
Editing an Alert's Assignee

You can assign an Alert to an individual or group.

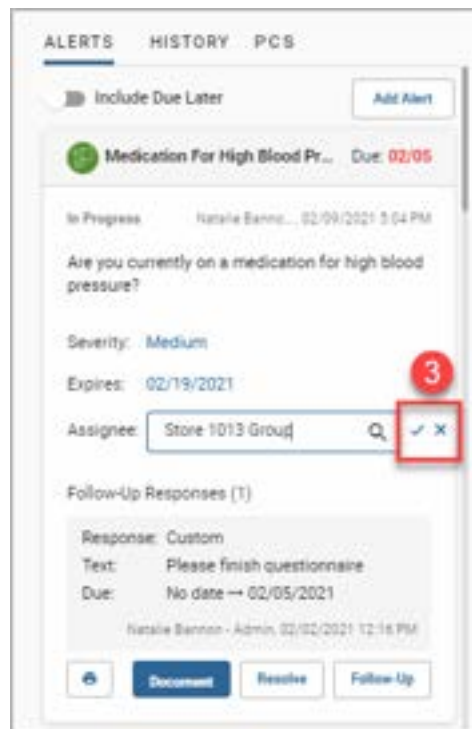
For more information on creating Groups, please refer to [Chapter 12: CPS Groups](#).



- 1) Hover over the Alert's **Assignee** field and select the **Edit** icon () when it appears or continue to hover for several seconds and a **Click to edit** pop-up will appear.

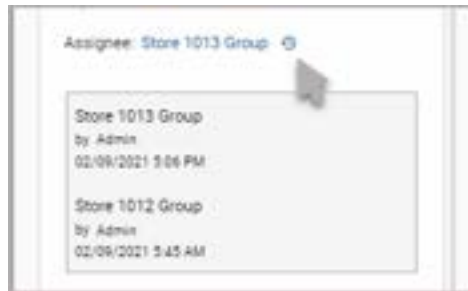


- 2) In the **Assignee** field start to type the name of an individual or group and a list that includes the same character string will show. Select the assignee from the list.



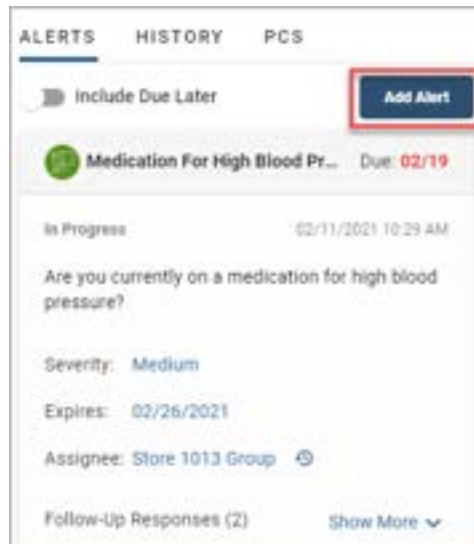
- 3) Select the **Check Mark** icon to save your change, or the **X** icon to cancel your change.

Note: To track assignee changes select the **History** icon next to the **Assignee** field and the assignee changes display immediately under the field. Reselect the icon to collapse the assignee history for the Alert.

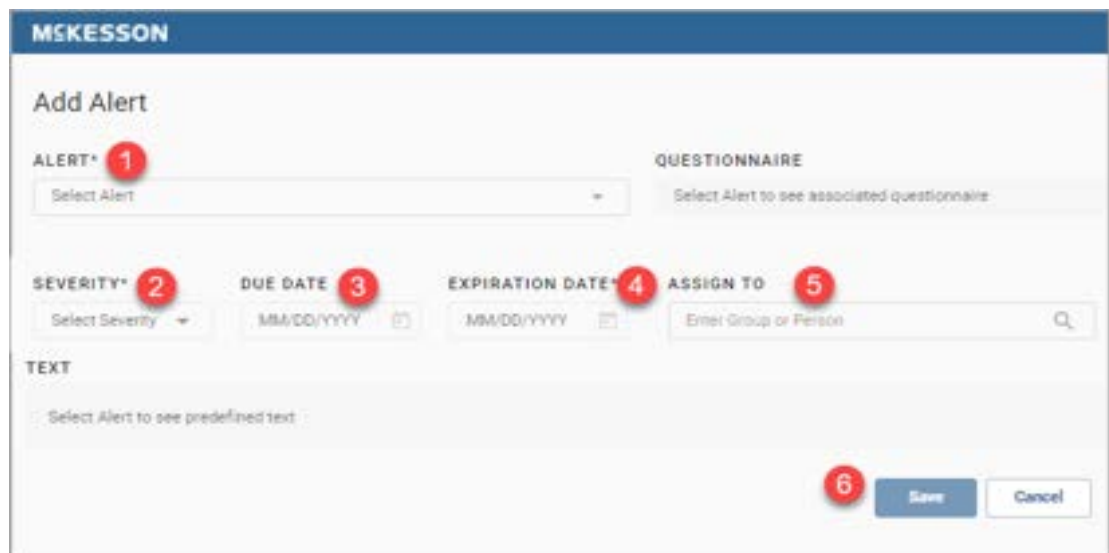


Adding an Alert

From within the **Alerts** tab you can add an Alert for the patient on demand as needed. Depending on the Alert you add, there may be a questionnaire associated.



To begin adding an Alert select the **Add Alert** button and the **Add Alert** window displays.



- 1) From the **Alert** drop-down select the Alert or start to type an Alert name in the field and a list of available Alerts that include the same character string will show. When you select an Alert the Alert attributes update to the default values and any additional input fields applicable to that Alert will display.
- 2) Use the **Severity** drop-down to modify the Alert severity if necessary.

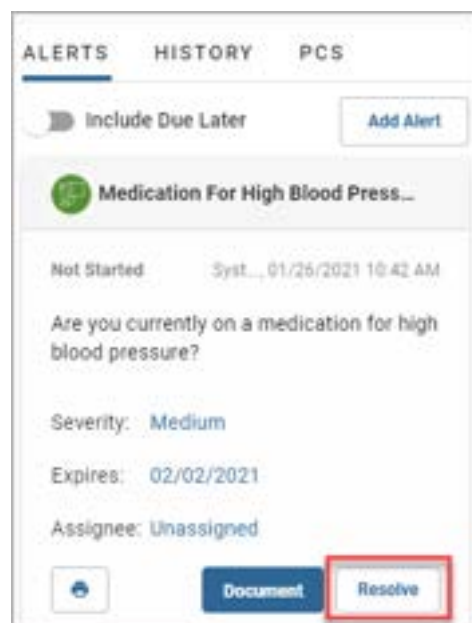
- 3) In the **Due Date** field either select the **Calendar** icon (📅) to use the pop-up calendar to select an updated due date or enter the updated date directly into the field in mm/dd/yyyy format.
- 4) In the **Expiration Date** field either select the **Calendar** icon (📅) to use the pop-up calendar to select an updated expiration date or enter the updated date directly into the field in mm/dd/yyyy format.
- 5) In the **Assignee** field start to type the name of an individual or group and a list that includes the same character string will show. Select the assignee from the list.

For more information on creating Groups, please refer to [Chapter 12: CPS Groups](#).


- 6) To create the Alert, select the **Save** button.

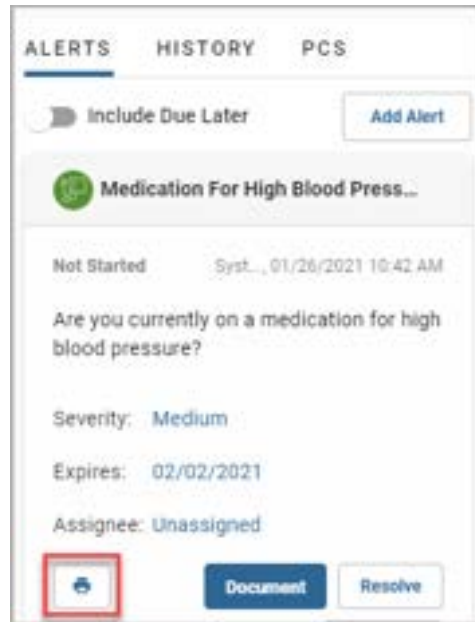
Resolving an Alert

For Alerts without an associated questionnaire, use the **Resolve** button to resolve the Alert. If a questionnaire is associated to an Alert, when you select the **Resolve** button, you will get a pop-up window to confirm that you want to resolve the Alert without completing the associated questionnaire. Once an Alert is resolved you can view its history in the **History** tab. For more information on the **History** tab, please refer to "[Clinical App History Tab](#)" on [page 103](#).



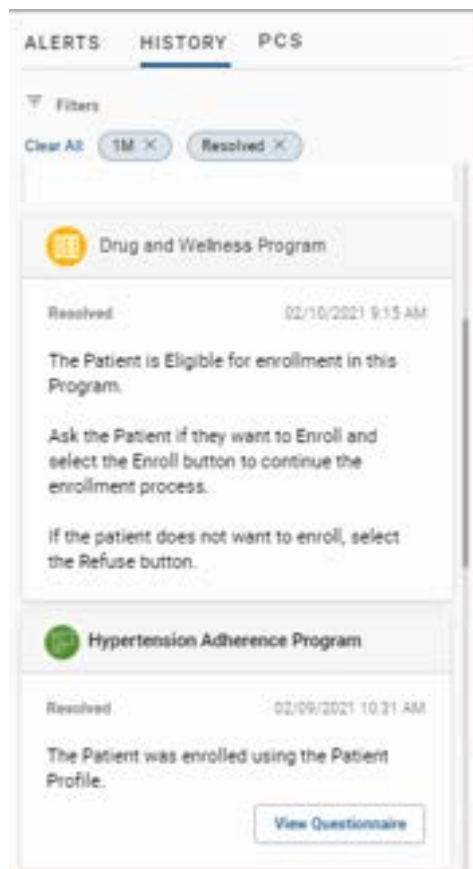
Printing an Alert

You can print an Alert by selecting the **Print** icon (). Note that only one Alert can be printed at a time.



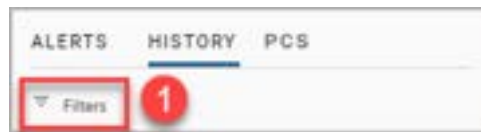
Clinical App History Tab

The **History** tab provides access to historical Alert activity for the patient. Both expired and resolved Alerts will be available in the **History** tab and, for each Alert, you will be able to view the associated questionnaire, if applicable, and all Follow-Up Responses, as well as the user that last updated the Alert and the corresponding date/time. The **History** tab will be sorted by **Last Updated** date (newest to oldest) and will include, by default, Alerts resolved within the last month.

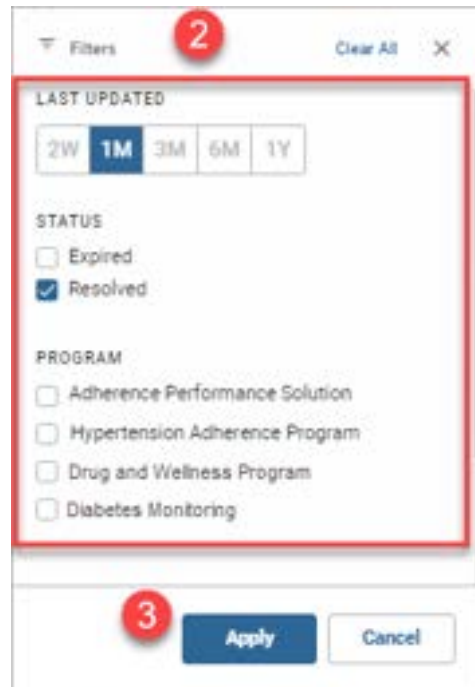


Filtering the Historical Alerts

Follow the steps below to filter for historical Alerts.



1) On the **History** tab select **Filters** and a **Filters** pop-up displays.



2) Select the filter criteria for the following:

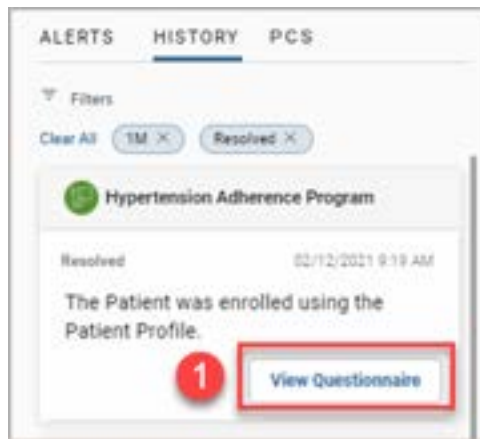
- **Last Updated:** This filter allows you to specify a time period either 2 weeks, 1 month, 3 months, 6 months or 1 year. You can only choose one option and, if no option is selected, then historical Alerts for the last 3 years will display.
- **Status:** Filter historical Alerts with a status of **Expired** and/or **Resolved**.
- **Program:** Check the check box(es) of the desired Program(s).

3) Select the **Apply** button and the **Filters** pop-up closes.

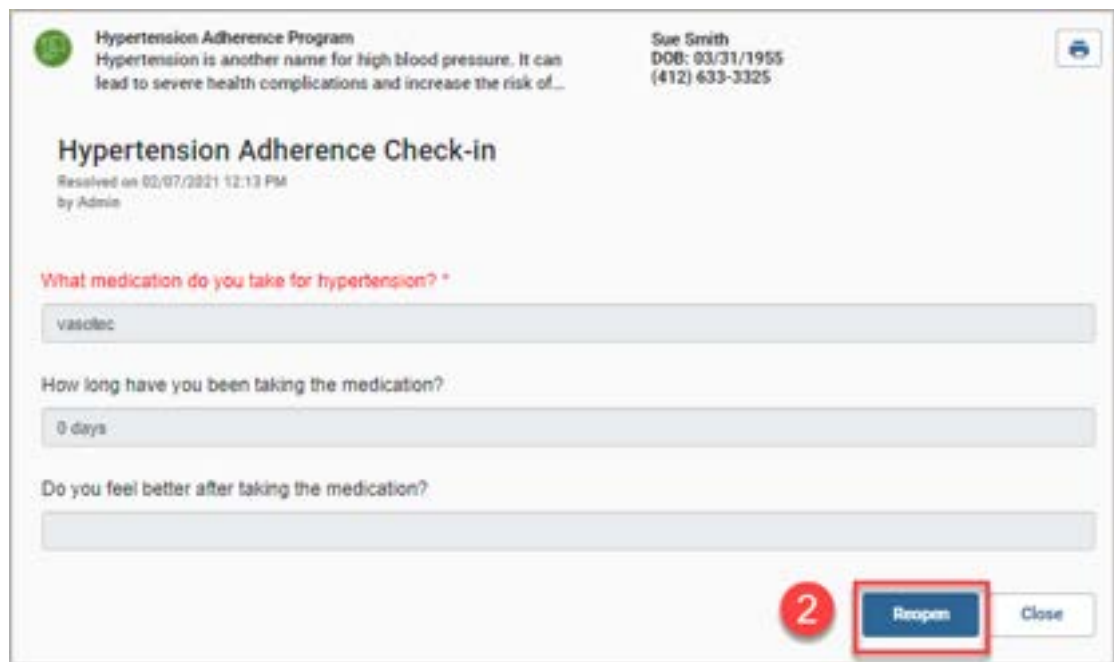
To clear all of the filters, select **Clear All**.

Viewing and Reopening Questionnaires

Using the **History** tab, you can access an Alert's associated questionnaire.



- 1) On the **History** tab select the **View Questionnaire** button and the questionnaire displays.



- 2) Select the **Reopen** button in the questionnaire to edit the questionnaire.
Note: The **Reopen** button will only display in a historical questionnaire if you have the appropriate role.

Hypertension Adherence Program
Hypertension is another name for high blood pressure. It can lead to severe health complications and increase the risk of...

Sue Smith
DOB: 03/31/1955
(412) 633-3325

Hypertension Adherence Check-in

Resolved on 02/12/2021 9:19 AM
by Admin

3

What medication do you take for hypertension? *

Diovan

How long have you been taking the medication?

Do you feel better after taking the medication?

4

COMMENT*
Patient changed medication

5 Resolve Close

3) Once the questionnaire is reopened for editing, update the information where appropriate.

Note: If a reopened questionnaire has not been resolved in 24 hours, the questionnaire will automatically be closed for editing.

4) The **Comment** field is required. Enter a comment related to why the questionnaire was reopened or what was updated.

5) Select the **Resolve** button to save your changes and close the questionnaire for editing. Select the **Close** button to discard the changes to the questionnaire.

Note: To track questionnaire reopen history, select the **History** icon under the questionnaire name. Reselect the icon to collapse the reopen history for the questionnaire.

Resolved on 03/06/2021 12:36 PM 
by Admin

Comment: reopen

Reopened on 03/06/2021 12:36 PM
by Admin

Resolved on 02/24/2021 11:31 AM
by Admin

Clinical App PCS Tab



Please refer to [Chapter 14: CPS Vendor Programs, "Accessing On Demand Messages in the Clinical App"](#) on page 180 for more information about the **PCS** tab.

Clinical App Links Tab



Please refer to [Chapter 16: CPS and STRAND Integration](#) for more information about the **Links** tab.

8. CPS Matching Queue

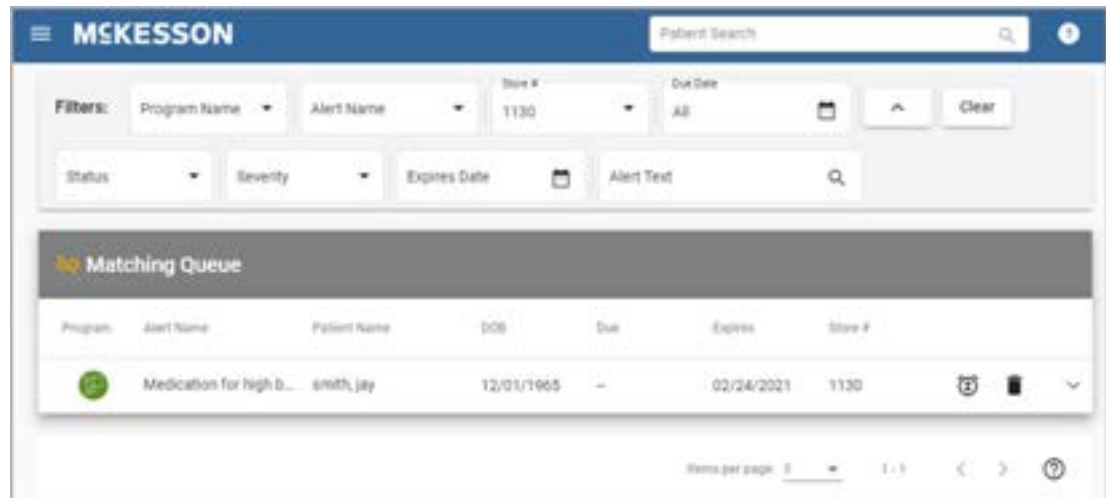
The **Matching Queue** is a centralized view of all Alerts not yet associated to a patient. For example, Alerts created via Bulk Alert without a patient match populate in this queue.

Actions You Can Take in the CPS Matching Queue

- ["Sort Order in the Matching Queue" on page 110](#)
- ["Accessing Total Count in the Matching Queue" on page 111](#)
- ["Column Sorting in the Matching Queue" on page 111](#)
- ["Filtering Alerts in the Matching Queue" on page 112](#)
 - ["Filtering the Matching Queue Example" on page 115](#)
- ["Assigning an Alert to a Patient" on page 115](#)
- ["Snoozing an Alert in the Matching Queue" on page 117](#)
- ["Resolving an Alert from the Matching Queue" on page 118](#)

Sort Order in the Matching Queue

To access the queue, navigate to the **Matching Queue** using the CPS menu option (☰) in the upper-left corner.



Alerts will display in the **Matching Queue** based on the following default sort order:

- 1) Due date (past due to future due)
- 2) Alert Severity (High, Medium, Low)

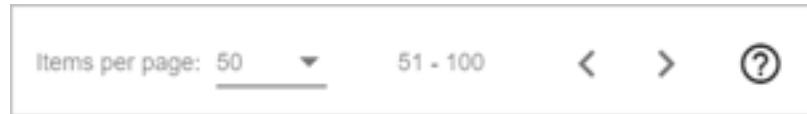
Note the following specifics about **Matching Queue** attributes:

- **Program:** The Program Icon associated to the Alert. To view the full Program Name, you can hover over the Program Icon.
- **Alert Name:** The name of the Alert.
- **Patient Name:** The first and last name of the patient associated to the Alert, if available.
- **DOB:** The date of birth of the patient associated to the Alert, if available.
- **Due:** The due date associated to the Alert. If the Alert does not have a defined due date, "--" will display within this column.
- **Expires:** The expiration date associated to the Alert.
- **Store #:** The store number associated to the Alert.

Note: If an Alert's details are currently being viewed by another user in your pharmacy, the corresponding row in the **Matching Queue** will be hidden from your view.

Accessing Total Count in the Matching Queue

At the bottom of the **Matching Queue** displays the pagination options and a total count of Alerts icon.



- The **Items per page** can be changed to 5, 10, 25, 50 or 100. Once the amount is selected the queue will update to display the selected amount of Alerts on each page.
- Use the **Previous page** (◀) or **Next page** (▶) arrows to go to the previous or next page of Alerts.
- Hover on the **Question Mark** icon (ⓘ) to view the total count of Alerts.



Column Sorting in the Matching Queue

In addition to the default sort order, you have the ability to sort the columns in the **Matching Queue** manually by clicking on each column header. Column sorting will proceed in the following order:

- First click: Ascending. An up arrow (DOB ↑) will be displayed in the column header.
- Second click: Descending. A down arrow (DOB ↓) will be displayed in the column header.
- Third Click: The column sort will be cleared. The queue will return to the default sort order.

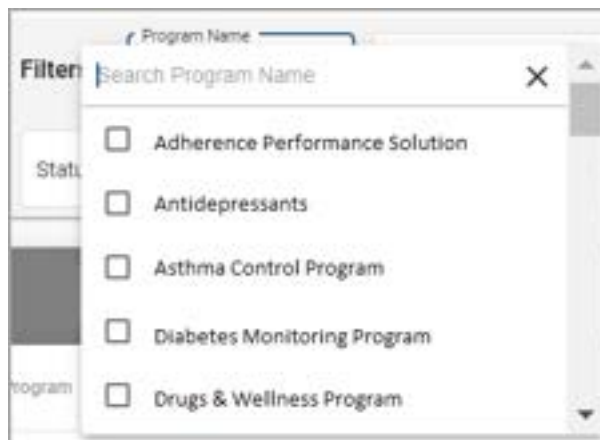
Column sort will be maintained until one of the following conditions is met:

- You clear the sort utilizing the 3rd click.
- You navigate to a different window.
- You logout of CPS.

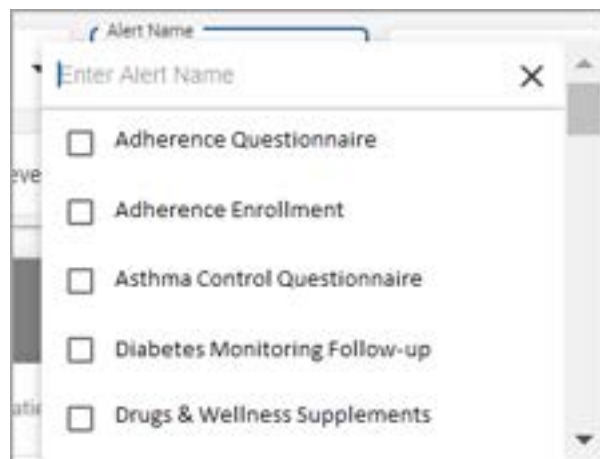
Filtering Alerts in the Matching Queue

When the **Matching Queue** is opened, the default view will display every available Alert. To narrow down the amount of Alerts you can filter the queue by any of the following:

- **Program Name:** Start to type a Program name in the field and a list with the same character string will show. Or select the drop-down arrow to display a list of Programs with unmatched Alerts. Check the box(es) of the desired Program(s).



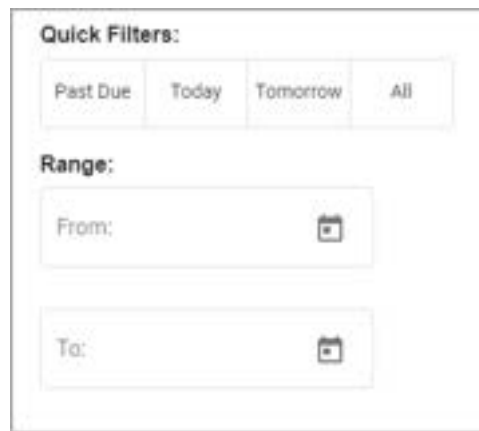
- **Alert Name:** Start to type an Alert name in the field and a list with the same character string will show. Or select the drop-down arrow to display a list of Alert names. Check the box(es) of the desired Alert(s).



- **Store #:** Start to type a store number in the field and a list with the same character string will show. Or select the drop-down arrow to display a list of stores with unmatched Alerts. Check the box(es) of the desired store(s).






- **Due Date:** The **Due Date** filter allows you to select a **Quick Filter** or input a custom date range.



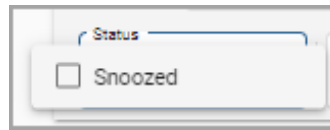
Available **Quick Filters** include:

- **Past Due:** This filter restricts the results to those Alerts that are past due.
- **Today:** This filter includes all Alerts that are past due as well as those that are due today.
- **Tomorrow:** This filter includes all Alerts that are past due, due today and due tomorrow.
- **All:** This filter includes all Alerts, regardless of due date.

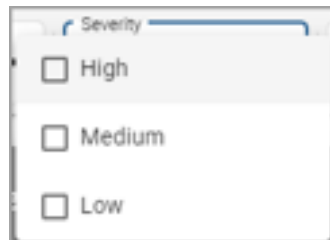
The **Range** filter option allows you to enter a custom start date (**From**) and end date (**To**). Only those Alerts with a due date within the specified range will be displayed.

- **More:** Use the **More** down arrow button () to see additional filters, or the up arrow () to see less filters.
- **Clear Filters:** The **Clear** button () resets the filters back to the default view. Note that this button only appears if there are 1 or more active filters in place.

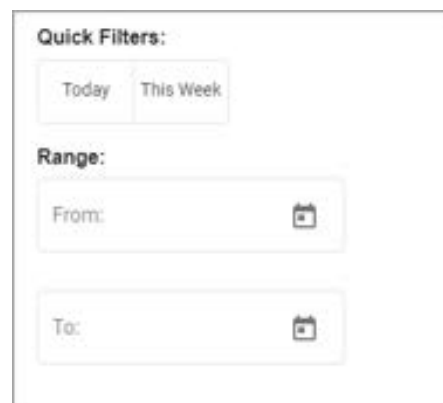
- **Status:** Select the drop-down arrow and select to filter all Alerts that are in a **Snoozed** status.



- **Severity:** Select the drop-down arrow to filter the unmatched Alerts with severity levels **High**, **Medium**, and **Low**. Check the box(es) of the desired severity(ies).



- **Expires Date:** The **Expires Date** filter allows you to select a **Quick Filter** or input a custom date range.

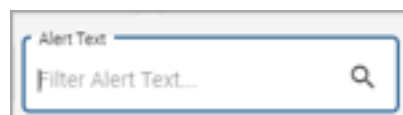


Available **Quick Filters** include:

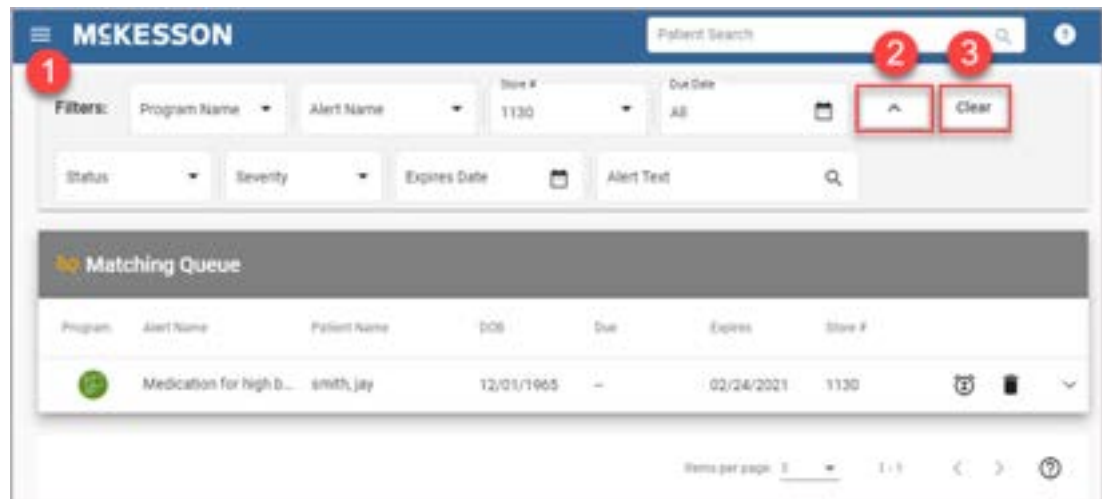
- **Today:** This filter restricts the results to those Alerts that are set to expire today.
- **This Week:** This filter includes all Alerts that are set to expire in the current calendar week (Sunday to Saturday).

The **Range** filter option allows you to enter a custom start date (**From**) and end date (**To**). Only those Alerts with an expiration date within the specified range will be displayed.

- **Alert Text:** Enter text to filter the queue to only show Alerts containing the specified text.



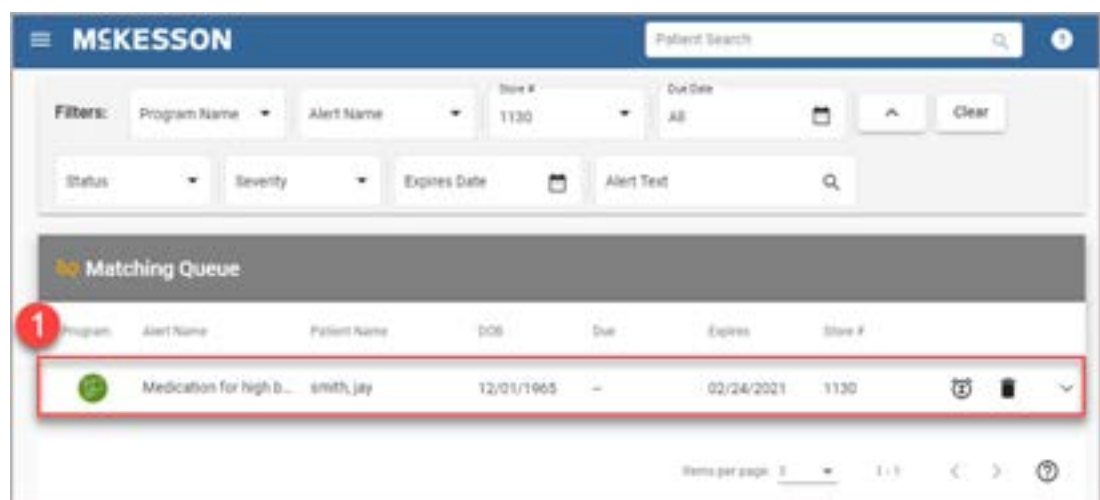
Filtering the Matching Queue Example



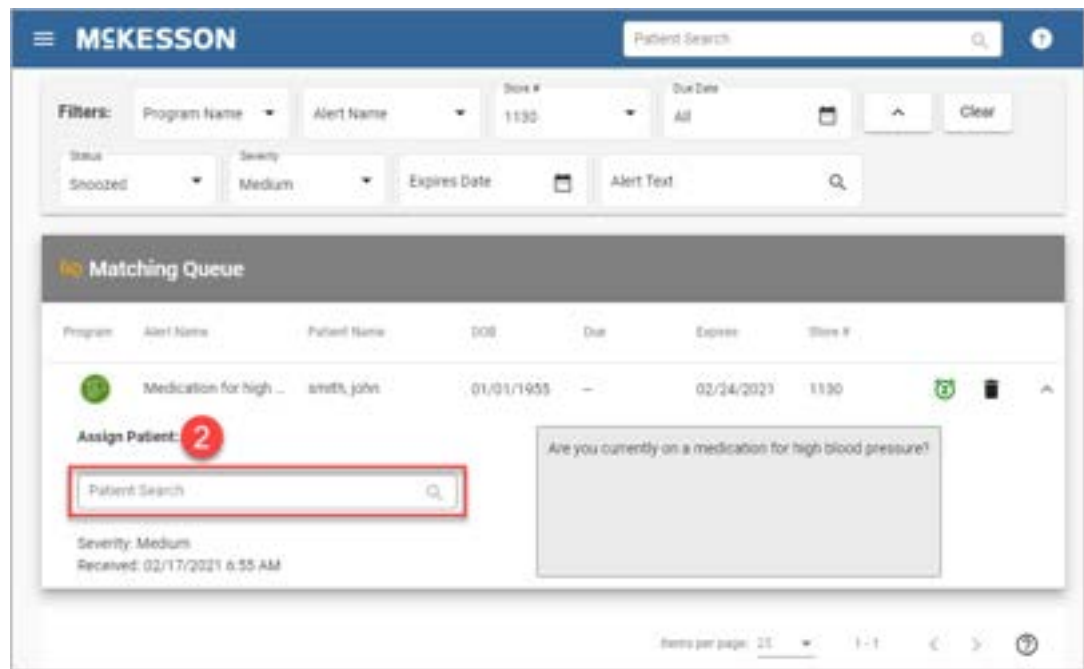
- 1) Enter/select search criteria in the corresponding filter fields.
- 2) Use the **More** button to access the **Status**, **Severity**, **Expires Date** and **Alert Text** filters if desired.
- 3) To clear all **Matching Queue** filters, select the **Clear Filters** button.

Assigning an Alert to a Patient

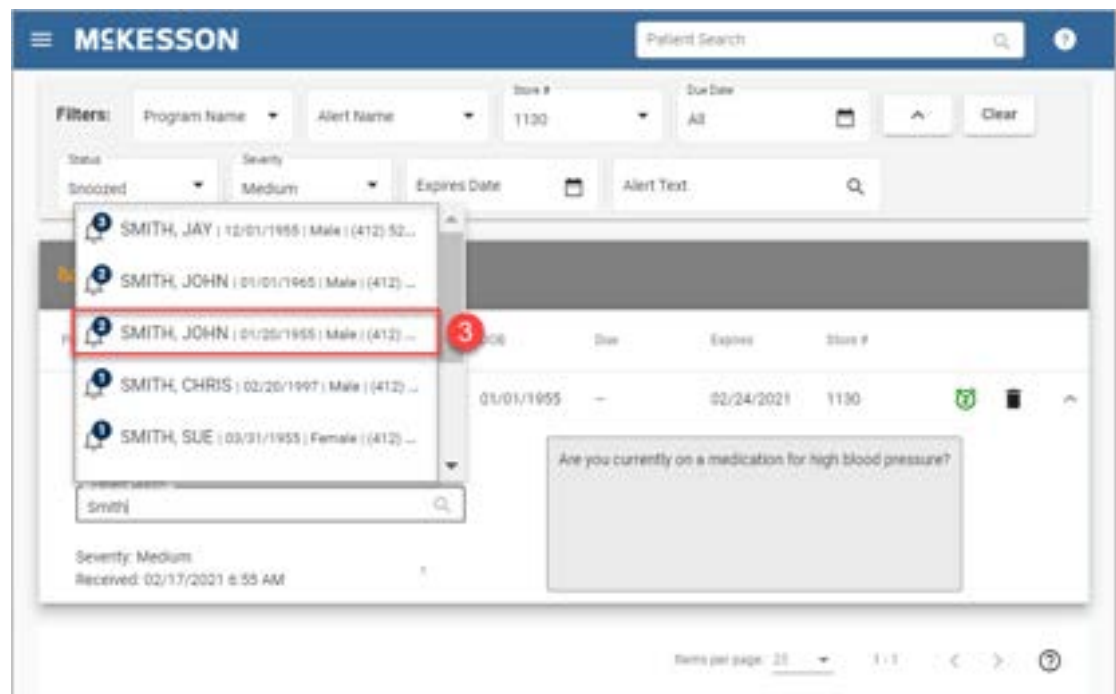
You can associate an Alert to a patient directly from the **Matching Queue**.



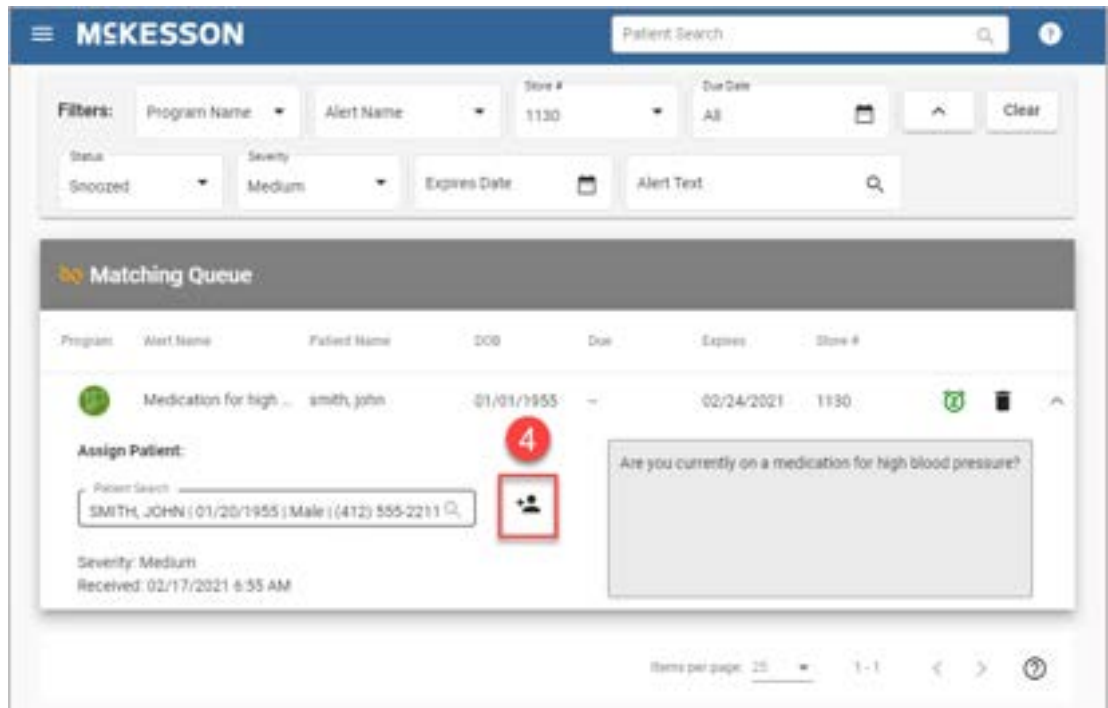
- 1) Select the desired Alert in the **Matching Queue** to expand the Alert's details.



- 2) Search for the patient by entering the patient's phone number, DOB, and/or last name, first name in the **Assign Patient** field.



- 3) Select the desired patient in the patient search results list.



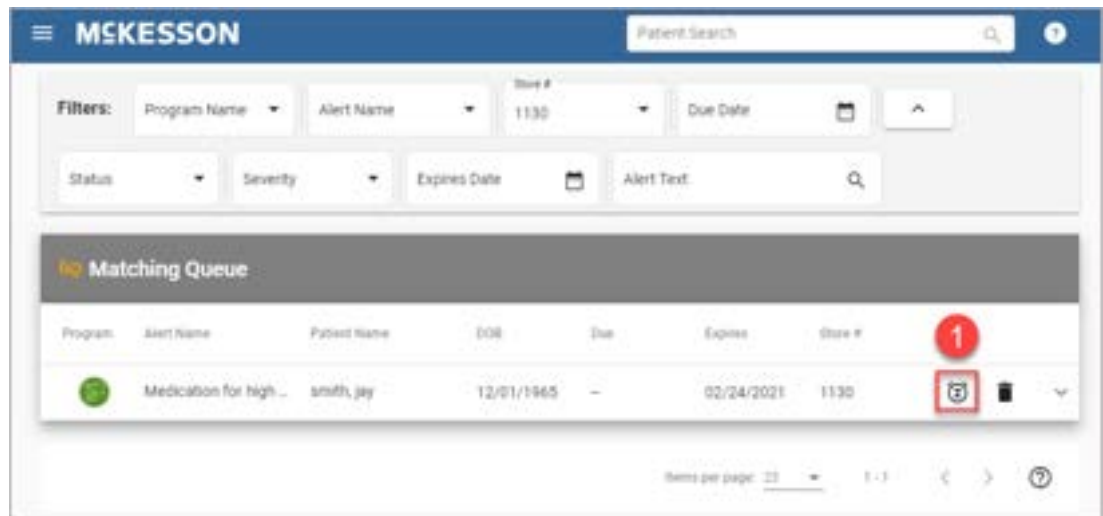
4) Next, select the **Add Patient** (+) button to assign the Alert to the selected patient and remove the Alert from the **Matching Queue**.

Note: The following deduplication logic applies for Alerts assigned to patients via the **Matching Queue**:

- If the selected patient already has the same unexpired, unresolved Alert, then the Alert will not be assigned to the patient but will be removed from the **Matching Queue**.
- If the selected patient had the same Alert that expired or was resolved, then the Alert will be assigned to the patient and removed from the **Matching Queue**.

Snoozing an Alert in the Matching Queue

If you are not yet ready to associate an Alert to a patient, you can set the Alert's **Status** to **Snoozed** for the remainder of the day. The Alert's status will automatically update the following day so that the Alert is no longer snoozed.

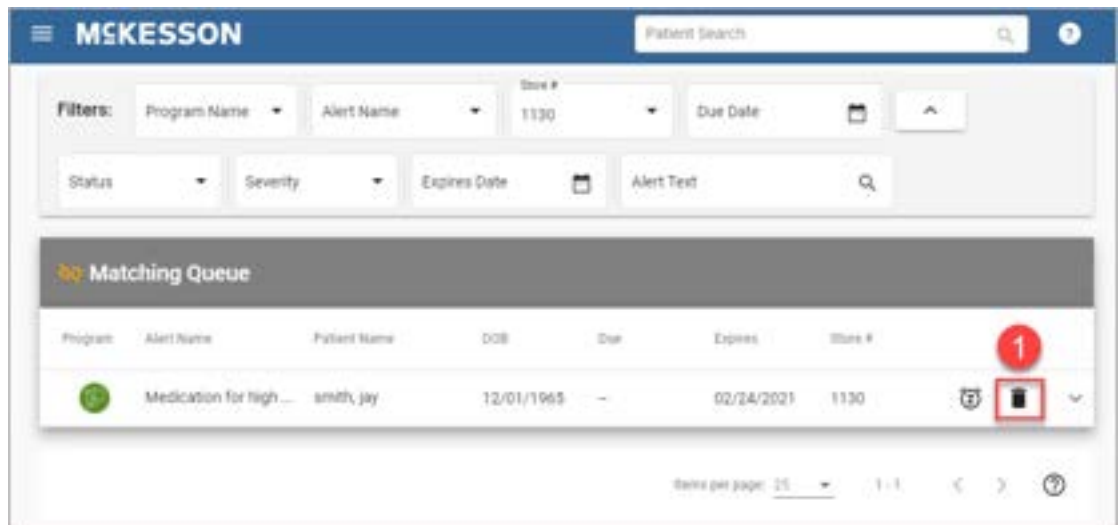


1) Select the **Snooze Alert** (🕒) button for the desired Alert.

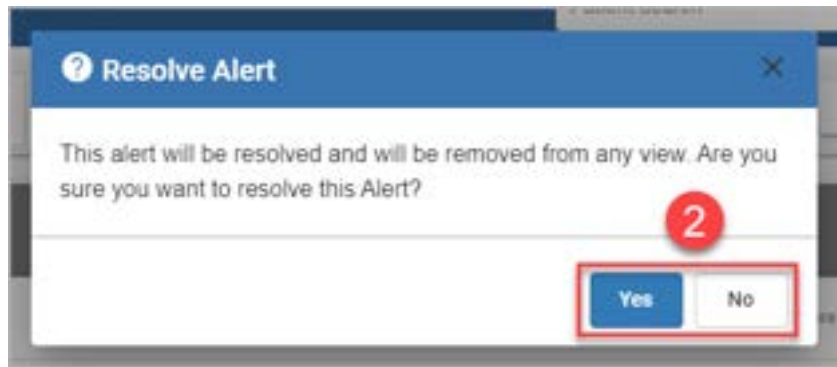
Note: You can unsnooze an Alert by filtering the **Matching Queue** for snoozed Alerts and then selecting the green **Snooze Alert** (🕒) button for the Alert.

Resolving an Alert from the Matching Queue

If an Alert cannot be associated to a patient, you can resolve the Alert directly from the **Matching Queue**.



1) Select the **Resolve Alert** (🗑️) button for the desired Alert.



- 2) Select **Yes** in the **Resolve Alert** pop-up to resolve the Alert, or **No** to retain the Alert in the queue.

9. CPS Task Queue

The **Task Queue** provides a list of all active Alerts available for patients both in your local store and if you do load balancing for another store, so you can take action outside of workflow. The Alerts displayed in this queue can be prioritized, according to the parameters you apply, so that you can deal with the most important Alerts first. Alerts will continue to populate in this queue until they have been resolved or they expire. Note that load balancing is not available in Pharmaserv.

Actions You Can Take in the CPS Task Queue

- ["Sort Order in the Task Queue" on page 122](#)
- ["Accessing Total Count in the Task Queue" on page 123](#)
- ["Column Sorting in the Task Queue" on page 124](#)
- ["Filtering Alerts in the Task Queue" on page 124](#)
 - ["Filtering the Task Queue Example" on page 128](#)
- ["Open a Patient Profile via Task Queue" on page 128](#)

Sort Order in the Task Queue

Navigate to the **Task Queue**.

| Program | Alert Name | Patient Name | DOB | Due | Assignee | Status | Expires | Store # | Last Updated |
|---------|--------------|--------------|------------|------------|---------------|-------------|------------|---------|------------------------|
| | Adherence... | SMITH, JO... | 12/11/1942 | 02/09/2021 | - | Not Started | 02/16/2021 | 1130 | - |
| | Asthma Co... | SMITH, JO... | 11/04/1980 | 02/16/2021 | - | In Progress | 02/23/2021 | 1130 | 02/03/2021 1:18 PM |
| | Adverse R... | SMITH, JAY | 12/01/1955 | 02/19/2021 | - | In Progress | 03/01/2021 | 1130 | 02/11/2021 9:31 AM |
| | Adherence... | SMITH, JAY | 12/01/1955 | 02/19/2021 | - | In Progress | 02/26/2021 | 1130 | 02/11/2021 10:21 AM |
| | Medicatio... | SMITH, JO... | 01/01/1965 | 02/19/2021 | Store 1013... | In Progress | 02/26/2021 | 1130 | 02/11/2021 10:29 AM |
| | Supplemen... | SMITH, JO... | 01/01/1965 | 02/22/2021 | - | Not Started | 02/27/2021 | 1130 | - |

Alerts will display in the queue for your EnterpriseRx facility (or the facilities for which you do load balancing). In Pharmserv, this default display is the individual store's Alerts. Alerts in this queue will be sorted in the following order:

- 1) Due date (past due to future due)
- 2) Alert Severity (High, Medium, Low)
- 3) Last Updated date/time (oldest to newest)

Note the following specifics about **Task Queue** attributes:

- **Program Icon:** The Program Icon associated to the Alert. To view the full Program Name, you can hover over the Program Icon.
- **Alert Name:** The name of the Alert. To view the full Alert, you can hover over the Alert Name.
- **Patient Name:** The first and last name of the patient associated to the Alert, if provided during Bulk Enroll.
- **DOB:** The date of birth of the patient associated to the Alert, if provided during Bulk Enroll.
- **Due:** The due date associated to the Alert. If the Alert does not have a defined due date, "--" will display within this column.

- **Assignee:** The group or individual assigned to the Alert. If the Alert does not have an assignee, "--" will display within this column.
- **Status:** The status of the Alert either 'Not Started' or 'In Progress'.
- **Expires:** The expiration date associated to the Alert.
- **Store #:** The store number associated to the Alert.
- **Last Updated:** The date and time that the Alert was last updated by pharmacy staff. If the Alert has not yet been updated, "--" will display within this column. The count of Follow-Up Responses associated to the Alert will also display to the right of the date/time.



Important:

- Different types of Alerts will display differently in the **Task Queue**. Some Alerts, like Vendor activity Alerts, will contain hyper-links for you to connect to the Vendor site for greater patient and Program detail.
- If an Alert's details are currently being viewed by another user in your pharmacy, the corresponding row in the **Task Queue** will highlight gray and be disabled.

Accessing Total Count in the Task Queue

At the bottom of the **Task Queue** displays the pagination options and a total count of Alerts icon.



- The **Items per page:** can be changed to 5, 10, 25, 50 or 100. Once the amount is selected the queue will update to display the selected amount of Alerts on each page.
- Use the **Previous page** (<) or **Next page** (>) arrows to go to the previous or next page of Alerts.
- Hover on the **Question Mark** icon (?) to view the total count of Alerts.



Column Sorting in the Task Queue

In addition to the default sort order, you have the ability to sort the columns in the **Task Queue** manually by clicking on each column header. Column sorting will proceed in the following order:

- First click: Ascending. An up arrow (DOB ↑) will be displayed in the column header.
- Second click: Descending. A down arrow (DOB ↓) will be displayed in the column header.
- Third Click: The column sort will be cleared. The queue will return to the default sort order.

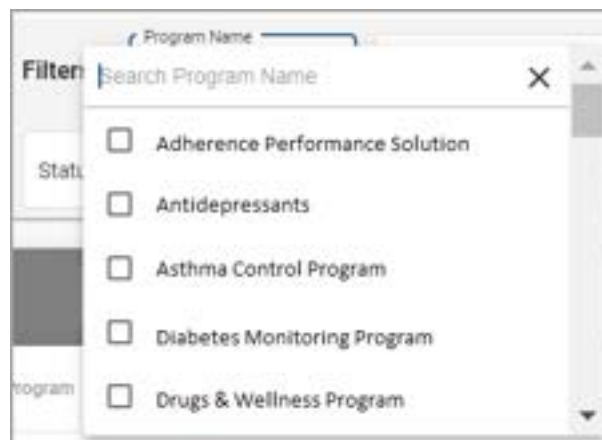
Column sort will be maintained until one of the following conditions is met:

- You clear the sort utilizing the 3rd click.
- You navigate to a different window via the menu option in the upper left corner (■).
- You close the **Clinical App** window.

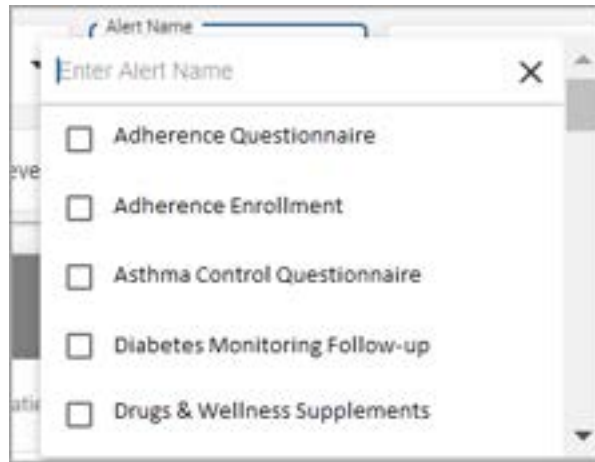
Filtering Alerts in the Task Queue

When the **Task Queue** is opened, the default view will display all available Alerts. To narrow down the amount of Alerts you can filter the queue by any of the following:

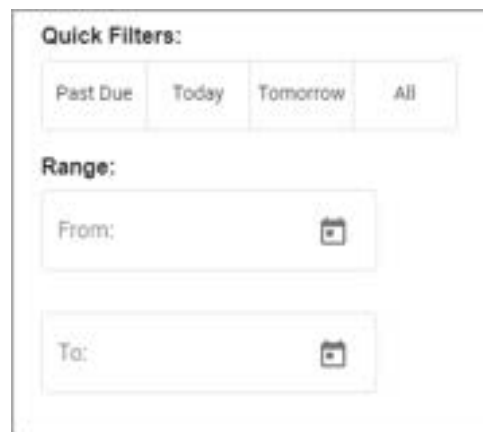
- **Program Name:** Start to type a Program name in the field and a list with the same character string will show. Or select the drop-down arrow to display a list of Programs with active (not yet expired) Alerts. Check the box(es) of the desired Program(s).



- **Alert Name:** Start to type an Alert name in the field and a list with the same character string will show. Or select the drop-down arrow to display a list of Alert names. Check the box(es) of the desired Alert(s).



- **Due Date:** The **Due Date** filter allows you to select a **Quick Filter** or input a custom date range.



Available **Quick Filters** include:




- **Past Due:** This filter restricts the results to those Alerts that are past due.
- **Today:** This filter includes all Alerts that are past due as well as those that are due today.
- **Tomorrow:** This filter includes all Alerts that are past due, due today and due tomorrow.
- **All:** This filter includes all Alerts, regardless of due date.

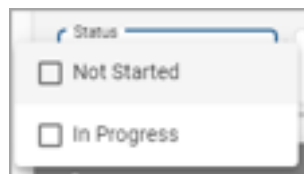
The **Range** filter option allows you to enter a custom start date (**From**) and end date (**To**). Only those Alerts with a due date within the specified range will be displayed.

- **Assignee:** Start to type a group or individual in the field and a list with the same character string will show. Or select the drop-down arrow to

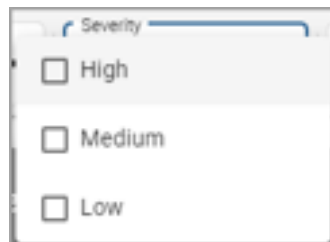
display a list of groups or individuals assigned to Alerts in the **Task Queue**. Check the box(es) of the desired assignee(s).



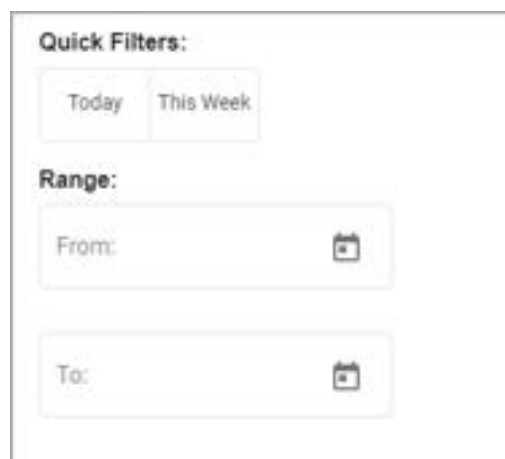
- **More:** Use the **More** down arrow button () to see additional filters, or the up arrow () to see less filters.
- **Clear Filters:** The **Clear** button () resets the filters back to the default view. Note that this button only appears if there are 1 or more active filters in place.
- **Status:** Select the drop-down arrow to select an Alert status of either **Not Started** or **In Progress**. Check the box of the desired status.



- **Severity:** Select the drop-down arrow to filter the Alerts with severity levels **High**, **Medium**, and **Low**. Check the box(es) of the desired severity(ies).



- **Expires Date:** The **Expires Date** filter allows you to select a **Quick Filter** or input a custom date range.

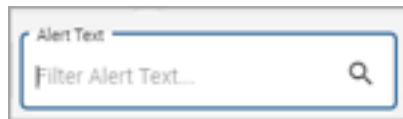


Available **Quick Filters** include:

- **Today:** This filter restricts the results to those Alerts that are set to expire today.
- **This Week:** This filter includes all Alerts that are set to expire in the current calendar week (Sunday to Saturday).

The **Range** filter option allows you to enter a custom start date (**From**) and end date (**To**). Only those Alerts with an expiration date within the specified range will be displayed.

- **Alert Text:** Enter text to filter the **Task Queue** to only show Alerts containing the specified text.



- **Store #:** Start to type a store in the field and a list with the same character string will show. Or select the drop-down arrow to display a list of stores with active (not yet expired) Alerts. Check the box(es) of the desired store(s). **Note:** If you are using Pharmaserv, the **Store #** text box displays the Store's NABP number.



Filtering the Task Queue Example

The screenshot shows the MCKESSON Task Queue interface. At the top, there is a 'Patient Search' field. Below it, a 'Filters' section contains several dropdown menus: 'Program Name', 'Alert Name', 'Due Date', 'Assignee', 'Status', 'Severity', 'Expires Date', 'Alert Text', and 'Store #'. A 'Clear' button is located to the right of the filter fields. A 'More' button (represented by an upward-pointing arrow) is also present. The 'Task Queue' section below the filters displays a table of tasks with columns for Program, Alert Name, Patient Name, DOB, Due, Assignee, Status, Expires, Store #, and Last Updated. The table contains six rows of task data.

| Program | Alert Name | Patient Name | DOB | Due | Assignee | Status | Expires | Store # | Last Updated |
|--------------|--------------|--------------|------------|------------|---------------|-------------|------------|---------|---------------------|
| Adherence | Adherence | SMITH, JO... | 12/11/1942 | 02/09/2021 | - | Not Started | 02/16/2021 | 1130 | - |
| Asthma Co... | Asthma Co... | SMITH, JO... | 11/04/1980 | 02/16/2021 | - | In Progress | 02/23/2021 | 1130 | 02/03/2021 1:18 PM |
| Adverse R... | Adverse R... | SMITH, JAY | 12/01/1955 | 02/19/2021 | - | In Progress | 03/01/2021 | 1130 | 02/11/2021 9:31 AM |
| Adherence | Adherence | SMITH, JAY | 12/01/1955 | 02/19/2021 | - | In Progress | 02/26/2021 | 1130 | 02/11/2021 10:21 AM |
| Medicatio... | Medicatio... | SMITH, JO... | 01/01/1965 | 02/19/2021 | Store 1013... | In Progress | 02/26/2021 | 1130 | 02/11/2021 10:29 AM |
| Supplemen... | Supplemen... | SMITH, JO... | 01/01/1965 | 02/22/2021 | - | Not Started | 02/27/2021 | 1130 | - |

- 1) Enter/select search criteria in the corresponding filter fields.
- 2) Use the **More** button to access the **Status**, **Severity**, **Expires Date**, **Alert Text** and **Store #** filters if desired.
- 3) To clear all **Task Queue** filters, select the **Clear** button.

Open a Patient Profile via Task Queue

You can access the **Patient Profile** for a given patient directly from the **Task Queue**. Select an Alert and the **Patient Profile** opens.

For more information on the Patient Profile, please refer to [Chapter 10: Viewing the CPS Patient Profile](#).

10. Viewing the CPS Patient Profile

In addition to viewing Alerts within the **Clinical App** and **Task Queue**, you can also view a patient's particular CPS information directly from the **Patient Profile**. The **Patient Profile** not only provides information on Program Enrollments and Program Alerts, but also allows you to record and view Patient Health Values.

Tasks in the CPS Patient Profile

- ["Recording New Patient Health Values" on page 130](#)
- ["Viewing Historical Patient Health Values" on page 131](#)
- ["Viewing Previously Resolved or Saved In Progress Questionnaires" on page 132](#)
- ["Viewing and Editing Program Enrollments" on page 133](#)
- ["Accessing the Task Queue from Patient Profile" on page 134](#)

Recording New Patient Health Values

The patient's standard health values display the most recent health values collected for the patient. To record new patient health values follow the steps below.

MCKESSON CLINICAL PROGRAMS SOLUTION

JOHN SMITH
CPS Patient Number: 1992000

Standard Patient Health Values

| | | | |
|---|---|---|---|
| BMI 25 <small>Updated: 02/09/2021 11:10AM</small> | Systolic Blood Pressure 120 <small>Updated: 02/09/2021 11:10AM</small> | Diastolic Blood Pressure 70 <small>Updated: 02/09/2021 11:11AM</small> | Pulse Rate Pulse Rate <small>Updated: --</small> |
| Postprandial Glucose mg/dl Postprandial Glucose <small>Updated: --</small> | Fasting Glucose mg/dl 110 <small>Updated: 02/09/2021 11:11AM</small> | A1C mg/dl A1C mg/dl <small>Updated: --</small> | Total Cholesterol mg/dl 200 <small>Updated: 02/09/2021 11:11AM</small> |
| LDL Cholesterol mg/dl 60 <small>Updated: 02/09/2021 11:11AM</small> | HDL Cholesterol mg/dl 60 <small>Updated: 02/09/2021 11:11AM</small> | Triglycerides mg/dl Triglycerides mg/dl <small>Updated: --</small> | |

1 Edit

1) Select the **Edit** button.

MCKESSON CLINICAL PROGRAMS SOLUTION

JOHN SMITH
CPS Patient Number: 1992000

Standard Patient Health Values

| | | | |
|---|---|--|---|
| BMI BMI <small>Updated: 02/09/2021 11:10AM</small> | Systolic Blood Pressure Systolic Blood Pressu <small>Updated: 02/09/2021 11:10AM</small> | Diastolic Blood Pressure Diastolic Blood Press <small>Updated: 02/09/2021 11:11AM</small> | Pulse Rate Pulse Rate <small>Updated: --</small> |
| Postprandial Glucose mg/dl Postprandial Glucose <small>Updated: --</small> | Fasting Glucose mg/dl Fasting Glucose mg/dl <small>Updated: 02/09/2021 11:11AM</small> | A1C mg/dl A1C mg/dl <small>Updated: --</small> | Total Cholesterol mg/dl Total Cholesterol mg/dl <small>Updated: 02/09/2021 11:11AM</small> |
| LDL Cholesterol mg/dl LDL Cholesterol mg/dl <small>Updated: 02/09/2021 11:11AM</small> | HDL Cholesterol mg/dl HDL Cholesterol mg/dl <small>Updated: 02/09/2021 11:11AM</small> | Triglycerides mg/dl Triglycerides mg/dl <small>Updated: --</small> | |

2 **3** Save Cancel

2) Enter the appropriate patient health value or values in the available value fields.

3) Select the **Save** button.

Viewing Historical Patient Health Values

On the **Patient Health Values** tab you can view the patient’s historical standard health values and you will also see any values collected using a questionnaire. Each value will have a **Received Date** and who the value was **Updated By**.

The screenshot shows the McKesson Clinical Programs Solution interface. At the top, there are three tabs: "Patient Health Values" (highlighted with a red box), "Program Enrollment", and "Program Messages". Below the tabs is a "Filter By:" section with a text input field and five filter buttons: "Past Month", "Past 3 Months", "Past 6 Months", "Past Year", and "All". Below the filter section is a table with the following columns: "Program", "Field Name", "Field Value", "Received Date", and "Updated By".

| Program | Field Name | Field Value | Received Date | Updated By |
|--------------------------------|----------------------------------|--|--------------------|------------|
| Hypertension Adherence Program | Do you take medication everyday? | -- | 02/10/2021 12:46PM | Admin |
| Hypertension Adherence Program | Do you take medication everyday? | -- | 02/10/2021 09:15AM | Admin |
| | Patient Notes | The patient started taking medication for high blood pressure. | 02/09/2021 11:21AM | Admin |
| | BMI | 25 | 02/09/2021 11:15AM | Admin |
| | Total Cholesterol mg/dl | 200 | 02/09/2021 11:17AM | Admin |
| | Fasting Glucose mg/dl | 110 | 02/09/2021 11:17AM | Admin |
| | Diastolic Blood Pressure | 70 | 02/09/2021 11:17AM | Admin |

You can also specify a range (**Past Month**, **Past 3 Months**, **Past 6 Months**, **Past Year**, or **All**) and filter the table to view historical patient health values that fall within that range. The default view is **Past 6 Months**.

Viewing Previously Resolved or Saved In Progress Questionnaires

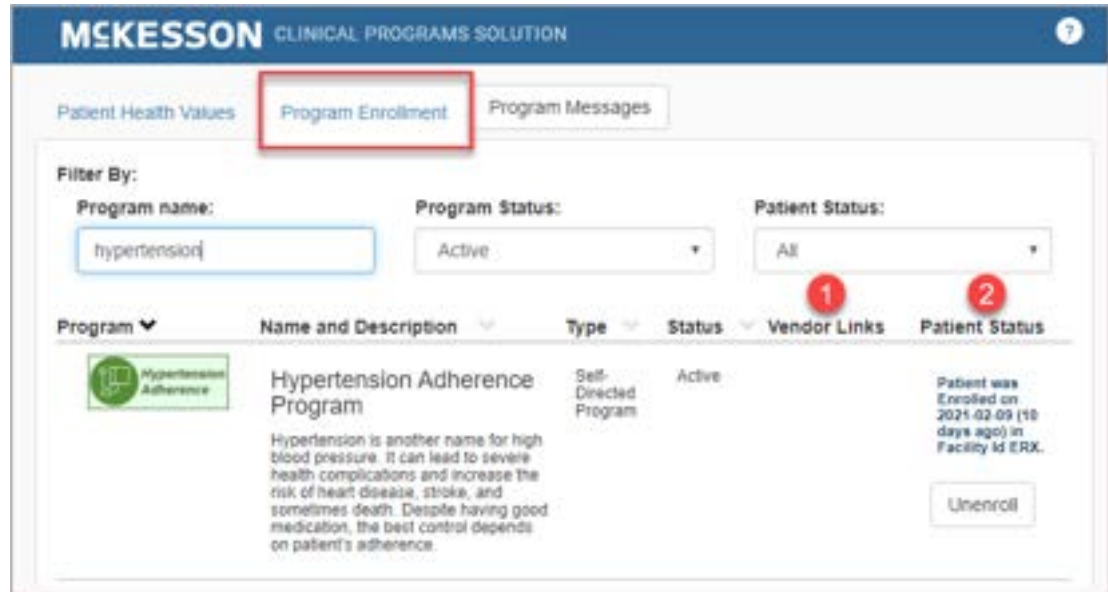
To review previously resolved or saved in progress questionnaires from the **Patient Health Values** table, select the hyper-link in the **Received Date** column for a given questionnaire field.

The screenshot shows the McKesson Clinical Programs Solution interface. At the top, there are tabs for 'Patient Health Values', 'Program Enrollment', and 'Program Messages'. Below the tabs is a 'Filter By:' section with a search box and buttons for 'Past Month', 'Past 3 Months', 'Past 6 Months', 'Past Year', and 'All'. The main content is a table with columns: Program, Field Name, Field Value, Received Date, and Updated By. Two rows in the 'Received Date' column are highlighted with a red box.

| Program ^ | Field Name ^ | Field Value ^ | Received Date ^ | Updated By ^ |
|-------------------------------|----------------------------------|--|--------------------|--------------|
| Hyperension Adherence Program | Do you take medication everyday? | -- | 02/10/2021 12:45PM | Admin |
| Hyperension Adherence Program | Do you take medication everyday? | -- | 02/10/2021 09:15AM | Admin |
| | Patient Notes | The patient started taking medication for high blood pressure. | 02/09/2021 11:21AM | Admin |
| | BMI | 25 | 02/09/2021 11:18AM | Admin |
| | Total Cholesterol mg/dl | 200 | 02/09/2021 11:17AM | Admin |
| | Fasting Glucose mg/dl | 110 | 02/09/2021 11:17AM | Admin |
| | Diastolic Blood Pressure | 70 | 02/09/2021 11:17AM | Admin |

Viewing and Editing Program Enrollments

To manage a patient's enrollment status for a Program, select the **Program Enrollment** tab.



When the **Program Enrollment** tab opens, all Self-Directed and Vendor Programs available will display. From here, you can:

- 1) Access links to external websites configured for a Vendor Program using the **Vendor Links** column.
- 2) For Programs enabled in your pharmacy, view enrollment details and enroll/unenroll the patient using the buttons in the **Patient Status** column.

To narrow down the Program list you can filter by any of the following:

- Program name
- Program Status (Active, Inactive, All Programs)
- Patient Status (All, Enrolled, Patient Not Asked, Unenrolled, Patient Declined, Vendor Rejected)

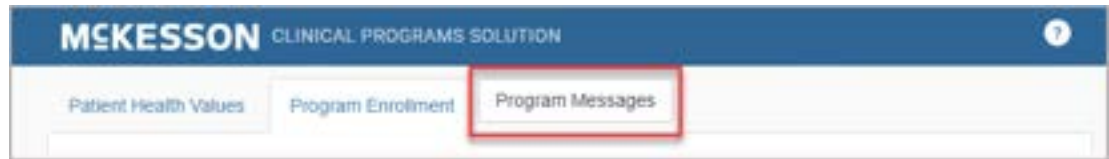
For **Patient Enrollment** Programs, the enrolling Facility Id will display in the **Patient Status** column if the patient has been enrolled in the Program.

Note: If you are using EnterpriseRx, the Facility Id corresponds to the enrolling store number; if using Pharmaserv, it corresponds to the NABP.

For **No Enrollment** Programs, the **Patient Status** column will indicate that no enrollment is required, but you can use the links in the **Vendor Links** column to access additional information through the Vendor site.

Accessing the Task Queue from Patient Profile

Within the **Patient Profile**, you have direct access to the **Task Queue** to view Alerts for the patient in context. To access the **Task Queue**, select the **Program Messages** button.



For more information on the **Task Queue**, please refer to [Chapter 9: CPS Task Queue](#).

11. Alert's Questionnaire

In addition to completing questionnaires and viewing/reopening questionnaires from historical Alerts, further actions can be taken. This chapter discusses the additional actions within questionnaires.

Tasks in an Alert's Questionnaire

- ["Viewing Current and Resolved Questionnaires" on page 136](#)
- ["Adding a Follow-Up Comment and/or Due Date Change via a Questionnaire" on page 136](#)
- ["Printing Questionnaires" on page 139](#)

Viewing Current and Resolved Questionnaires

To track a patient's clinical progress, you can view a patient's previously resolved questionnaires directly from the questionnaire window.

When a questionnaire is opened, the current questionnaire is displayed by default. Select the **View Version** drop-down to view a list of previously resolved questionnaires for that Program.

You can toggle between the current questionnaire and, at most, 26 previously resolved questionnaires by selecting a questionnaire in the **View Version** drop-down.

Adding a Follow-Up Comment and/or Due Date Change via a Questionnaire

The **Follow-Up** button in a questionnaire allows you to select a response to remind yourself, or someone else, to take action at a later time. The **Follow-Up** button also allows you to change the due date for the Alert. This functionality is useful when a patient may not be at the pharmacy or available over the phone for the questionnaire to be completed.

Note: Follow-Up functionality is not available in questionnaires that have been resolved.

- 1) Select the **Follow-Up** button and a Follow-Up Response input area will display in the questionnaire.

- 2) Enter the information for the Follow-Up. From the **Follow-Up Response** drop-down select a pre-defined response for the questionnaire or select **Custom** and enter required custom text in to text box.

- 3) In the **Due** field either select the **Calendar** icon (📅) to use the pop-up calendar to select an updated due date or enter the updated date directly into the **Due** field in mm/dd/yyyy format.



Important: A due date can be, at most, 999 days in the future. If you enter a due date beyond the 999 days maximum, the system will set the due date to the maximum date.

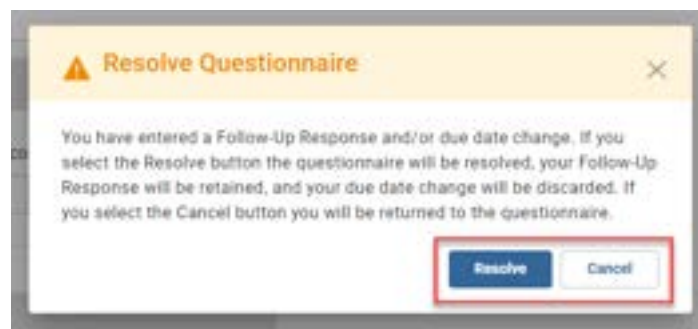
You can discard a Follow-Up Response and/or due date change by selecting the **Cancel** button.

Next, the result of a Follow-Up Response and/or due date change will differ depending upon if you select the **Save Progress** or **Resolve** button in the questionnaire:

- When you select the **Save Progress** button, the questionnaire values will be saved to the **Patient Profile** (if applicable) and the Follow-Up Response and/or due date change (if applicable) will be applied to the Alert.


Note: When a questionnaire associated to an Alert is saved, the Alert’s status will be updated to **In Progress**.

- When you select the **Resolve** button and you have added a Follow-Up Response and/or due date change, you will be prompted with a confirmation pop-up.




- If you select the **Resolve** button in the confirmation pop-up, the questionnaire values will be saved to the **Patient Profile**, the Alert will be resolved, and if there are any Follow-Up Responses they will be retained in the history.
- If you select the **Cancel** button in the confirmation pop-up, you will be returned to the questionnaire.

Printing Questionnaires

 **Hypertension Adherence Program**
Hypertension is another name for high blood pressure. It can lead to severe health...

John Smith
DOB: 01/01/1965
(412) 552-4141

Follow-Up 

Hypertension Adherence

VIEW VERSION

Current

What medication do you take for hypertension? *


Do you take medication everyday?

Does the medication make you feel like your hypertension is under control?

Resolve

Save Progress

Cancel

You can print a questionnaire by selecting the **Print** icon () within the questionnaire.

12. CPS Groups

Alerts support an **Assignee** field that can be set to an individual user or a group name that can be configured using **CPS Program Admin**. Groups can be created to organize which users are responsible for certain Alerts, such as a Pharmacist Group or a Technician Group.

Note: Individual users are not assigned to a group. Instead, users can easily identify their applicable work using the **Assignee** filter available in the **Task Queue** and **Matching Queue**.

Tasks for CPS Groups

- ["Accessing CPS Groups" on page 142](#)
- ["Adding a Group" on page 143](#)
- ["Editing a Group" on page 144](#)
- ["Removing a Group" on page 145](#)

Accessing CPS Groups

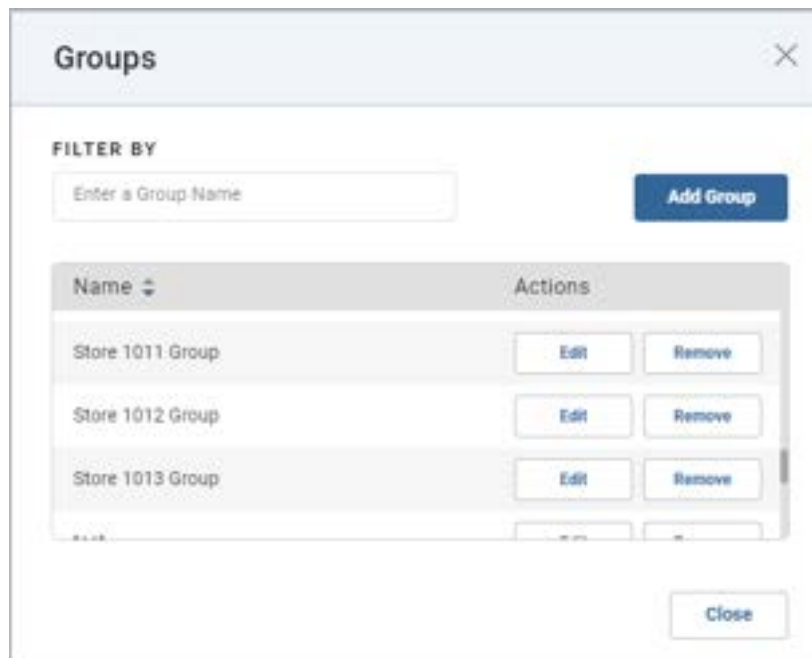
To Access **Groups**, Navigate to **CPS Program Admin**.

The **CPS Program Admin** window will display.

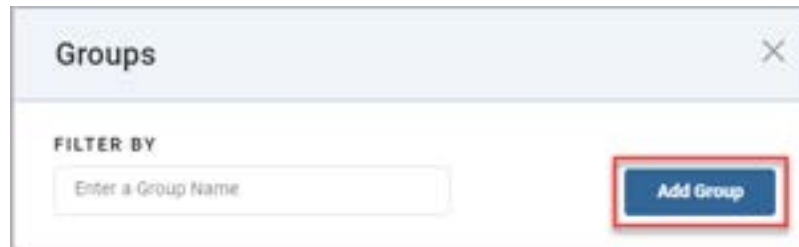
Select the **Groups** option.



The **Groups** window opens.

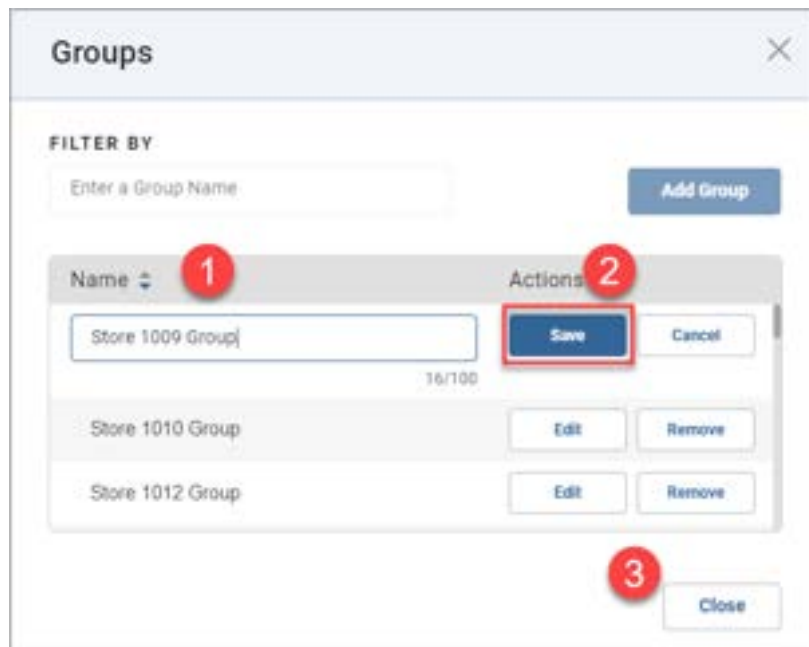


Adding a Group



The screenshot shows a dialog box titled "Groups" with a close button (X) in the top right corner. Below the title bar, there is a "FILTER BY" section with a text input field containing "Enter a Group Name". To the right of the input field is a blue button labeled "Add Group", which is highlighted with a red rectangular box.

To begin adding a group select the **Add Group** button.



The screenshot shows the "Groups" dialog box after the "Add Group" button was clicked. The "FILTER BY" section is still present. Below it is a table with three rows. The first row is highlighted and has a red circle with the number "1" next to the "Name" column header. The "Name" field contains "Store 1009 Group" and has a character count "16/100". To the right of the "Name" field is a red circle with the number "2" next to the "Actions" column header. The "Actions" column for the first row contains a blue "Save" button (highlighted with a red box) and a "Cancel" button. The second and third rows have "Edit" and "Remove" buttons. At the bottom right of the dialog box is a red circle with the number "3" next to a "Close" button.

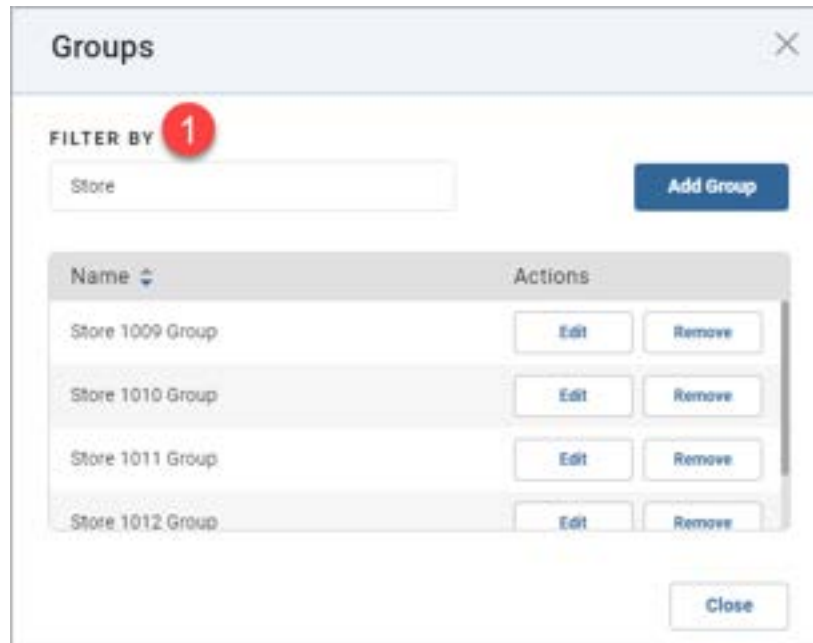
- 1) In the field enter the group name.
- 2) Select the **Save** button to save the new group.

To add additional groups, select the **Add Group** button and a new row will be added to the top of the list.

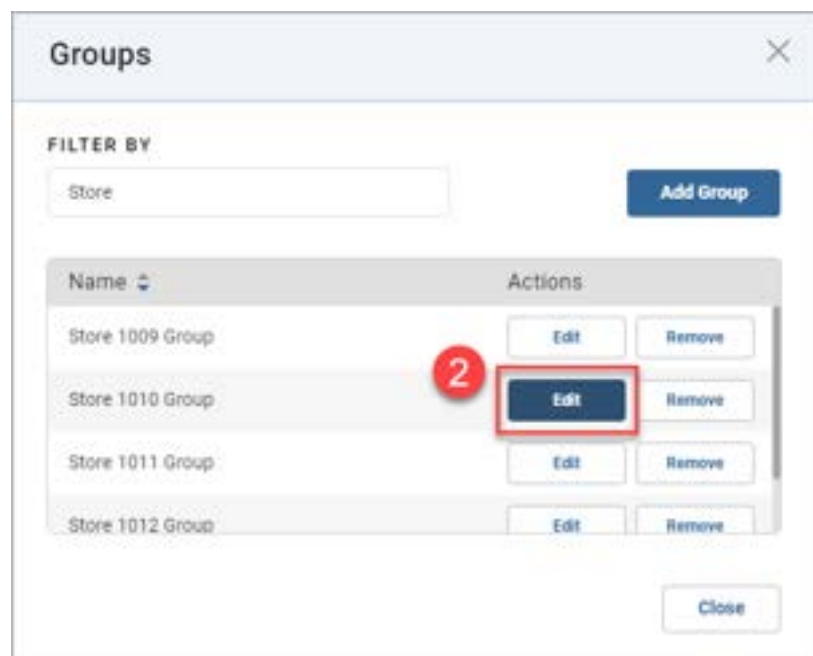
- 3) Select the **Close** button to close the window and go back to the **CPS Program Admin**.

To edit or remove groups follow the steps in [Editing a Group](#) and [Removing a Group](#) below.

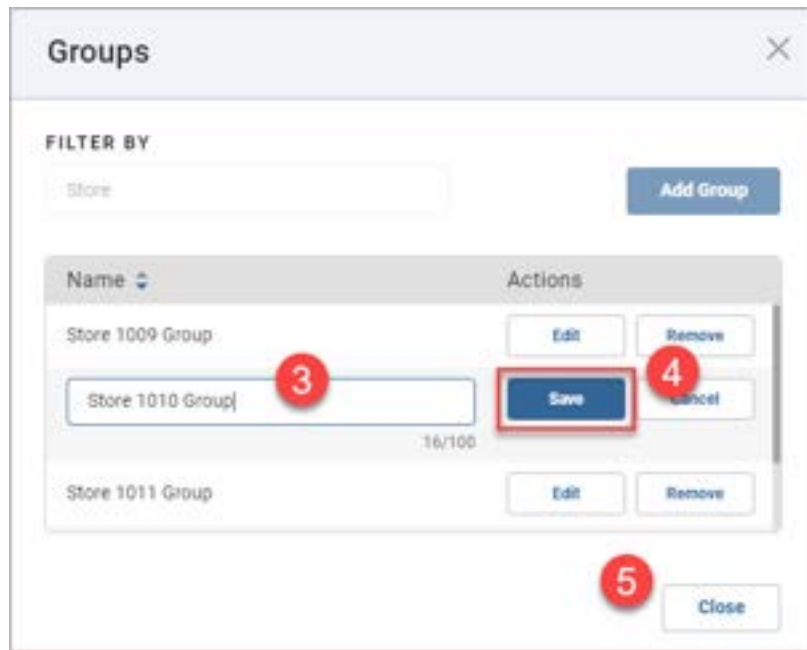
Editing a Group



- 1) Type the group name into the **Filter By** text box. If several names include the same character string, they will all show in the list. The more characters that are entered into the filter, the fewer entries that will be contained in the list.

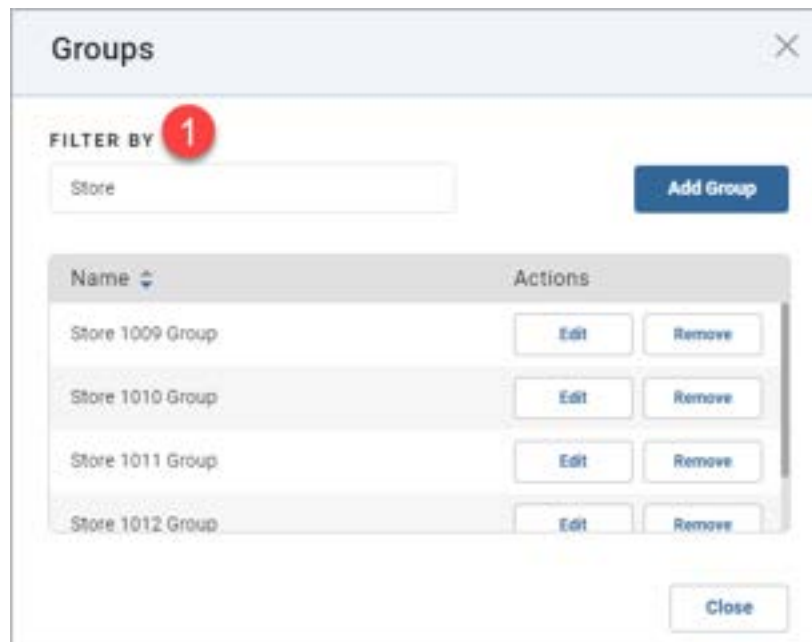


- 2) Select the **Edit** button next to the group you want to edit.

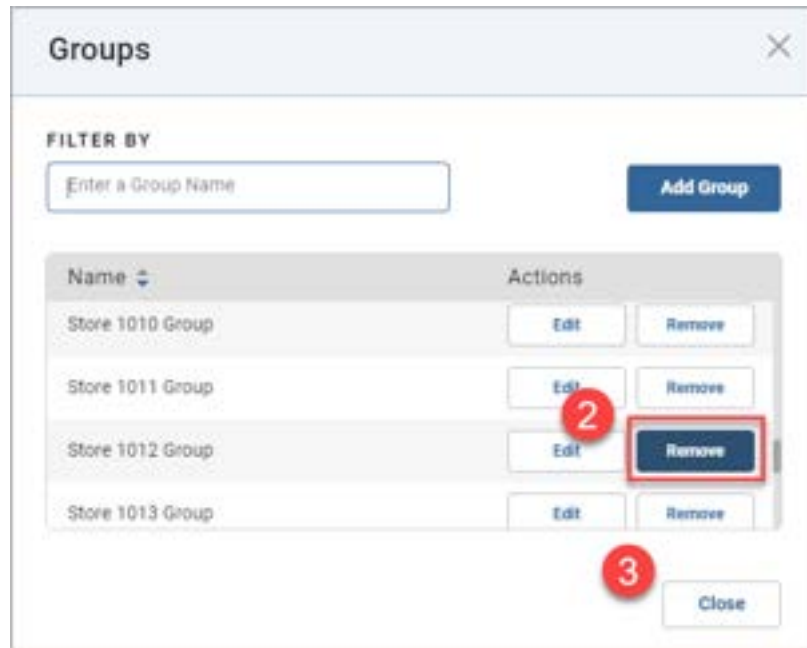


- 3) In the text box edit the group name.
- 4) Select the **Save** button to save the edited group.
- 5) Select the **Close** button to close the window and go back to the **CPS Program Admin**.

Removing a Group



- 1) Type the group name into the **Filter By** text box. If several names include the same character string, they will all show in the list. The more characters that are entered into the filter, the fewer entries that will be contained in the list.



- 2) Select the **Remove** button next to the group you want to remove.
- 3) Select the **Close** button to close the window and go back to the **CPS Program Admin**.

13. CPS Reports

CPS allows for ad hoc reporting via the **Reports** option in Program Admin. The **Reports** options provides access to the **CPS Alerts**, **CPS Patient Enrollments**, and **CPS Patient Measures** reports. When generated, each report will contain pre-selected columns specific to the selected report.

Tasks in Creating and Downloading a Report

- ["Accessing CPS Reports" on page 148](#)
- ["Entering Report Parameters" on page 148](#)
- ["Generating the Report" on page 150](#)
- ["Downloading the Report" on page 152](#)

Accessing CPS Reports

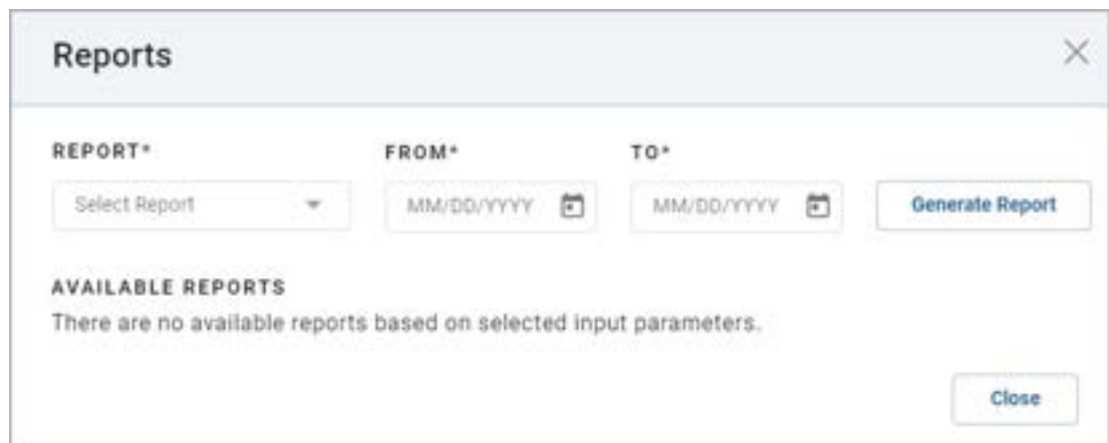
To Access **CPS Reports**, Navigate to **CPS Program Admin**.

The **CPS Program Admin** window will display.

Select the **Reports** option.



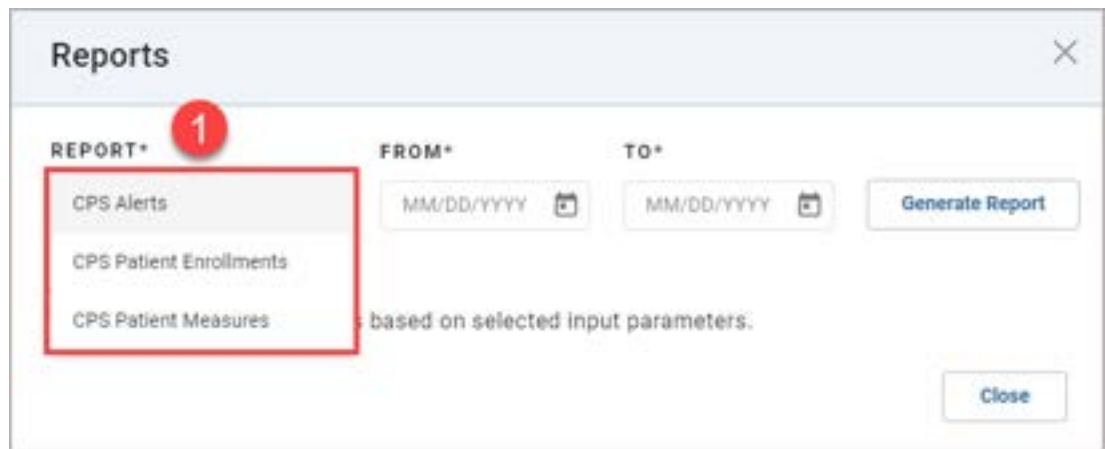
The **Reports** window will open.



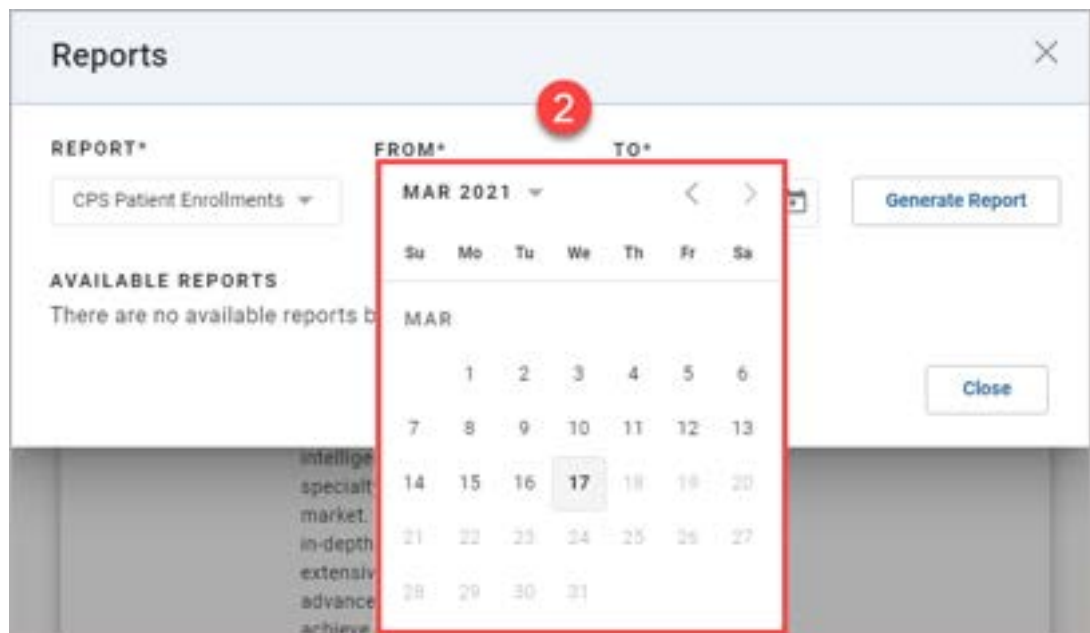
Entering Report Parameters

Enter the appropriate parameters for the report that you wish to generate.

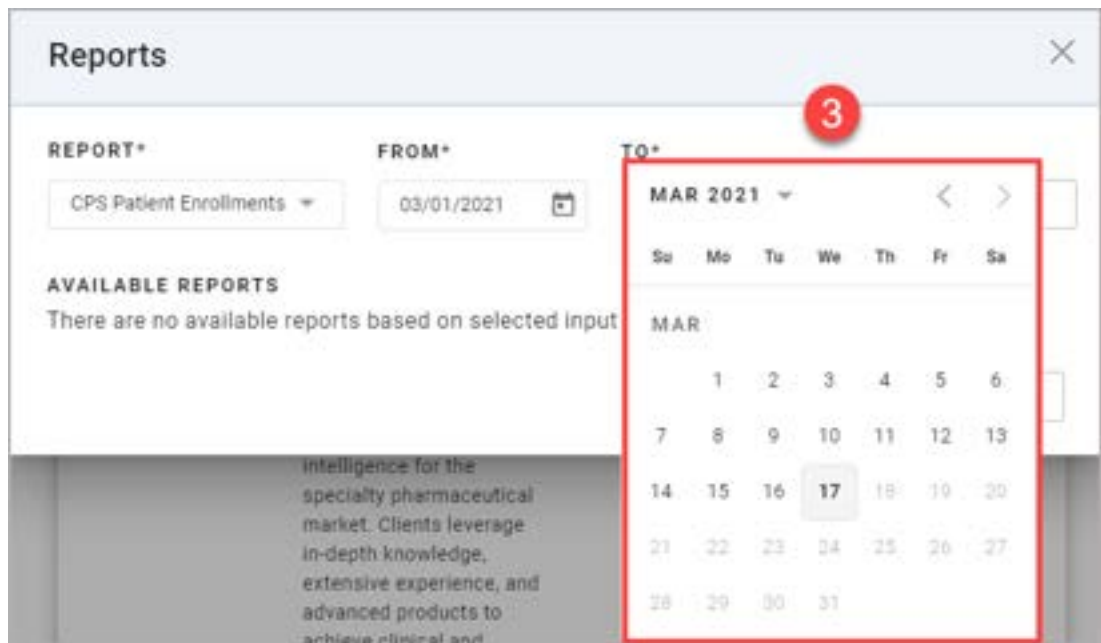
There are 3 parameters that must be entered.



- 1) **Report:** Use the drop-down to select the desired type of report. There are 3 options:
- **CPS Alerts** will contain CPS Alert activity (such as Alert status)
 - **CPS Patient Enrollments** will include patient enrollment updates (such as enrollment status)
 - **CPS Patient Measures** will consist of values captured for patients (such as questionnaire responses)

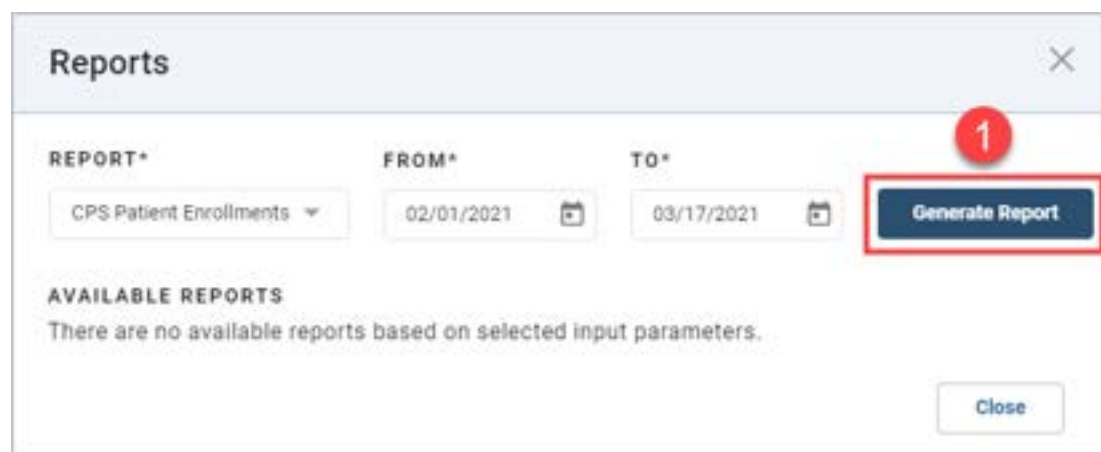


- 2) Enter the **From** (start) date of the report. The date can be entered by either:
- Selecting the **Calendar** icon (📅) and using the forward and/or back arrows to navigate to the desired start date. The calendar will default to the current (today's) date.
 - Manually enter the desired **From** date in mm/dd/yyyy format.



- 3) Enter the **To** (end) date of the report. The date can be entered by either:
- Selecting the **Calendar** icon (📅) and using the forward and/or back arrows to navigate to the desired start date. The calendar will default to the current (today's) date.
 - Manually enter the desired **To** date in mm/dd/yyyy format.

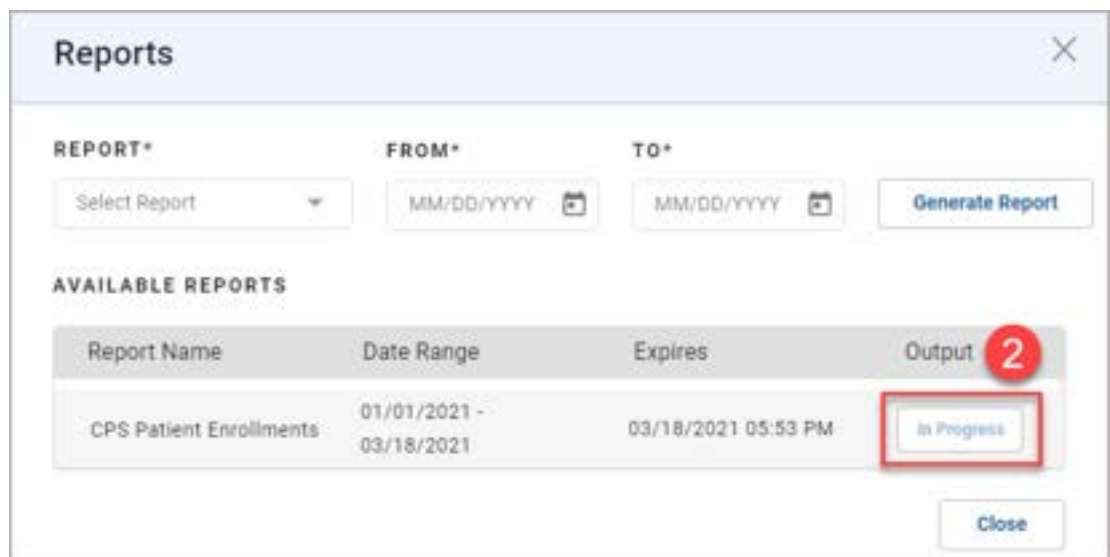
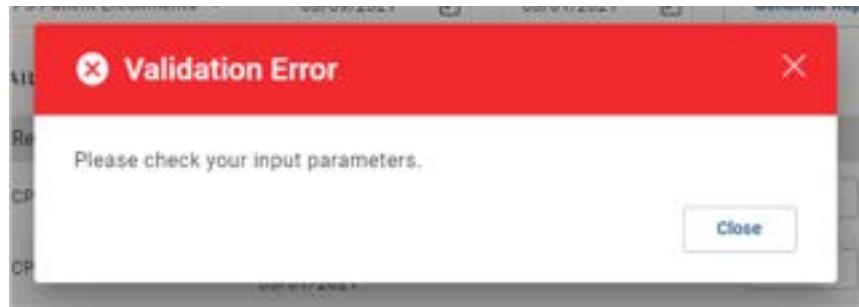
Generating the Report



- 1) Once all of the parameters have been entered, select the **Generate Report** button.

Note: If all 3 parameters are not entered, or if they are entered incorrectly, a **Validation Error** message will be displayed, instructing you to check your

input parameters. You will be required to update the report’s parameters in order to generate the report. An example of entering incorrect parameters is entering the **To** date earlier than the **From** date.



- 2) Subsequent to selecting the **Generate Report** button, the **Available Reports** section in the **Reports** window will update to include your most recent report.

Note: Your report may not be available immediately for download. If this is the case, the **Output** column will display **In Progress** when the report is still processing. Once complete, the **Output** column will update to display a **Download** button that you can select to download the report.

Downloading the Report

The screenshot shows a 'Reports' window with the following fields and controls:

- REPORT***: A dropdown menu with 'Select Report' as the current selection.
- FROM***: A date input field with the placeholder 'MM/DD/YYYY' and a calendar icon.
- TO***: A date input field with the placeholder 'MM/DD/YYYY' and a calendar icon.
- Generate Report**: A button to generate the report.
- AVAILABLE REPORTS**: A table with the following data:

| Report Name | Date Range | Expires | Output |
|-------------------------|-------------------------|---------------------|----------|
| CPS Patient Enrollments | 01/01/2021 - 03/18/2021 | 03/18/2021 05:53 PM | Download |
- Close**: A button at the bottom right of the window.

Once your report is available for download, select the **Download** button in the **Output** column. You will be given the opportunity to select the location where the report will be saved. You will also have the option to change the system generated file name. By default, the system generated name will be saved as a comma separated value (csv) file, and will use the following format:

[Report Type] [From]-[To].csv

Using the information in the example above, the system generated name will be:

CPS Patient Enrollments 01012021-030182021.csv

Note: The report will be available for download for 12 hours from the initial date and time it was submitted. Once the 12 hours has expired, the report will no longer display in the **Available Reports** section in the Reports window.

14. CPS Vendor Programs

Connect With Your Vendor Programs

CPS enables integration of multiple certified third-party solutions for in-workflow intervention and alerting. CPS will alert you of Vendor Program enrollment opportunities, as well as opportunities identified by the Vendor Program. Additionally, CPS provides patient and prescription information to some Vendor Programs to help reduce duplicate data entry.

CPS is integrated with several Vendor Programs in different market categories, such as:

- Specialty Therapy Management
- Hypertension Management
- Medication Therapy Management
- Immunization
- Patient Communications (See [Patient Communications Solution \(PCS\)](#) below)
- Adherence (Utilizing McKesson's Adherence Performance Solution, see [Chapter 15: CPS and APS Integration](#))
- Pharmacy eCare Plan Documentation (Utilizing STRAND, see [Chapter 16: CPS and STRAND Integration](#))

Patient Communications Solution (PCS)

PCS allows you to better communicate with your patients, through certified Vendors that support various forms of communication (emails, text messages, phone calls, and mobile applications) and notify your patients with refill reminders, pick up reminders, and more.

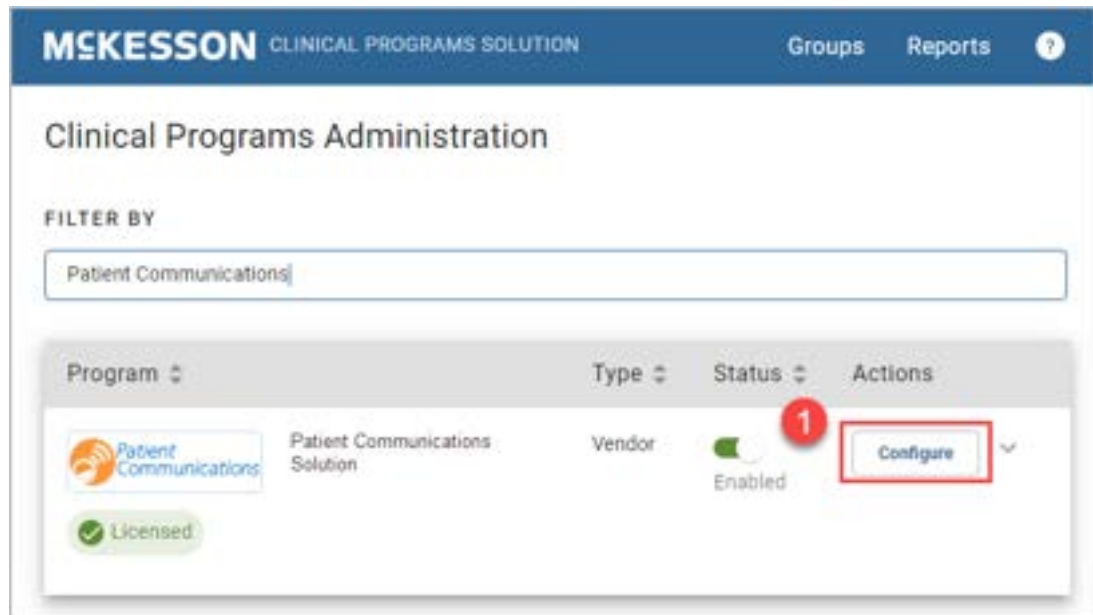
Note: PCS is only available for use with EnterpriseRx. Vendors are only available if certified.

Tasks to Configure PCS

- “Getting Started with PCS Configuration” on page 14-154
- “General Settings” on page 14-157
- “Communication Preferences” on page 14-158
- “Notification Setup” on page 14-161
- “Enrolling Patients in PCS” on page 14-176
- “PCS Automatic Enrollment” on page 14-183

Getting Started with PCS Configuration

To get started, navigate to **CPS Program Admin (Administration > Clinical Rx Programs > Clinical Programs Solution > CPS Program Admin)**.



- 1) Once **Clinical Programs Administration** is displayed, select the **Configure** button next to the **Patient Communications Solution** Program.

The screenshot shows the 'Configure Patient Communications Solution' page. At the top, there is a navigation bar with 'McKESSON CLINICAL PROGRAMS SOLUTION', 'Groups', 'Reports', and a help icon. A red circle with the number '2' is placed over the 'Program Settings' button, which is also enclosed in a red rectangular box. Below the navigation bar, the page title 'Configure Patient Communications Solution' is displayed. The main content area is divided into three sections: 'Patient Enrollment', 'Vendor Alerts', and 'PROGRAM ALERTS'. The 'Patient Enrollment' section contains a 'REFUSAL PERIOD' dropdown set to '1 Months' and a 'DUE DATE REMINDER' input field. The 'Vendor Alerts' section has a text prompt and a 'Follow-Ups' button. The 'PROGRAM ALERTS' section is a table with columns for Name, Due Date Reminder, Expires, Severity, and Actions. At the bottom right, there are 'Save' and 'Cancel' buttons.

2) Within the configuration window for **PCS**, select the **Program Settings** button.

Note: The **Program Settings** button is only available when configuring **PCS** at the corporate root level.

The **Program Settings** window will display with the following sections: **General Settings**, **Communication Preferences**, and **Notification Setup** (shown below).

McKESSON Clinical Programs Solution About Help

General Settings

- PCS Easy Mode
- Lock Patient Notification Setup

Communication Preferences

Select the Preferred Vendor for each Communication Method Vendor Configuration

| | |
|--------------|----------|
| Email | AIS |
| Text Message | AIS |
| Phone Call | mScripts |
| Mobile App | mScripts |

Notification Setup

| | | | | |
|---------------------|----------------------------|-------------------------------|-------|--|
| Email AIS | Text Message AIS | Phone Call mScripts | Event | Configurations Display Message Configuration |
|---------------------|----------------------------|-------------------------------|-------|--|

Close

General Settings

The **General Settings** section is where you manage the **PCS Easy Mode** and **Lock Patient Notification Setup** options.



PCS Easy Mode

When enabled, **PCS Easy Mode** has several key benefits:

- Support for a patient's preferred **Communication Method** (ex. Text Message).
- Automatic configuration of a patient's **Notification Setup** based on the patient's preferred **Communication Method**.

Note: The patient's preferred **Communication Method** will be automatically selected for all **Notification Setup Events** that support that **Communication Method**.

Use the toggle to enable or disable **PCS Easy Mode**.

Notes:

- If you are already using PCS and want to enable **PCS Easy Mode**, McKesson Pharmacy Systems (MPS) can optionally select the preferred **Communication Method** for all enrolled patients. Additionally, as part of this process, the **Notification Setup** for all enrolled patients can be updated to align with each patient's preferred **Communication Method**.

For more information please contact **MPS Customer Support**.

- Prior to enabling **PCS Easy Mode**, please coordinate with the appropriate Vendor(s).

Lock Patient Notification Setup

The **Lock Patient Notification Setup** option allows you to restrict editing of the **Notification Setup** section across all patients. When enabled, all configuration contained in the **Notification Setup** section for a patient will display in a read-only state.

Use the toggle to enable or disable the **Lock Patient Notification Setup** option.

Note: By default, the **Lock Patient Notification Setup** toggle is turned on when the **PCS Easy Mode** toggle is set to on. The **Lock Patient Notification Setup** toggle can be turned off if desired.

Communication Preferences

The **Communication Preferences** section allows you to configure your Vendor setup for PCS. Within this section, you can define and configure your Vendor for each **Communication Method** (Email, Text Message, Phone Call, and Mobile App), as well as define the priority for each **Communication Method**, if applicable.

Vendor Selection for Each Communication Method

When configuring your PCS Vendors, only one Vendor can be selected for each **Communication Method**. A Vendor can, however, be used for more than one **Communication Method** if desired.

| Select the Preferred Vendor for each Communication Method | Vendor Configuration | Select the Priority for Patient Enrollment |
|---|----------------------|--|
| Email | AIS | |
| Text Message | AIS | |
| Phone Call | mScripts | |
| Mobile App | mScripts | |

- 1) For each **Communication Method** that you want to support, select your Vendor using the drop-down menu. If you do not specify a Vendor for a **Communication Method**, the **Communication Method** will not be an available option for patients.

Note: As you make Vendor selections, the **Notification Setup** section updates to display a column for each supported **Communication Method**.

- 2) When **PCS Easy Mode** is enabled, the **Select the Priority for Patient Enrollment** column will display. This column allows you to define the priority of the **Email**, **Text Message**, and **Phone Call Communication**

Methods. The priority defined will be used to automatically select a patient’s preferred **Communication Method** when the patient is enrolled via the **Automatically Enroll New Patients** option or when the patient’s PCS configuration is updated via the EnterpriseRx **Consumer Portal**.

Select the numerical priority for **Email, Text Message, and/or Phone Call**, if applicable.

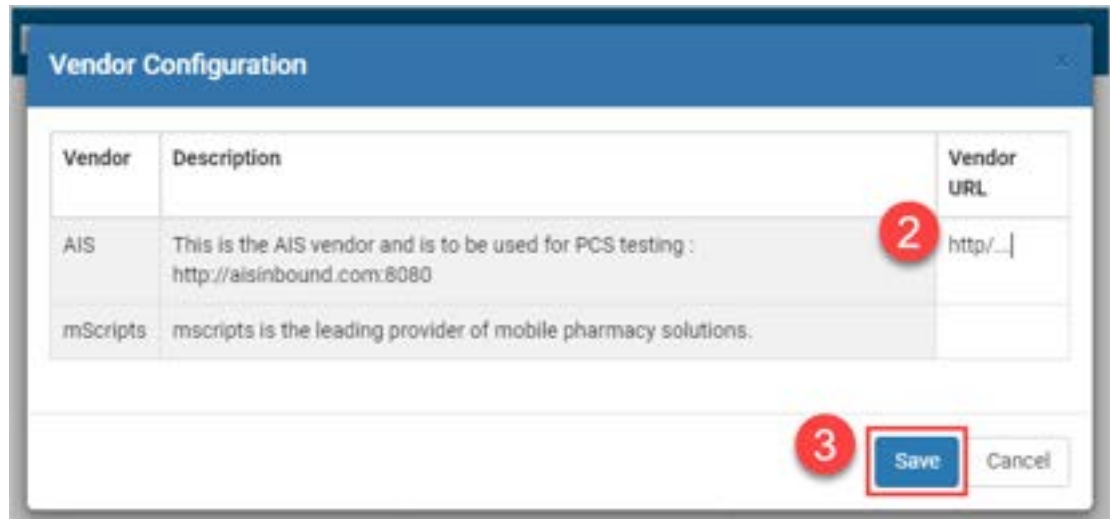
Vendor Configuration

The **Vendor Configuration** window allows you to modify the **Vendor URL** used as the endpoint to send messages to the Vendor.

Note: Modifying the **Vendor URL** is optional and will override the Vendor’s original configuration.

| Select the Preferred Vendor for each Communication Method | | Vendor Configuration | Select the Priority for Patient Enrollment |
|---|----------|----------------------|--|
| Email | AIS | | |
| Text Message | AIS | | |
| Phone Call | mScripts | | |
| Mobile App | mScripts | | |

- 1) In the **Communication Preferences** section, select the **Vendor Configuration** button. The **Vendor Configuration** window displays.



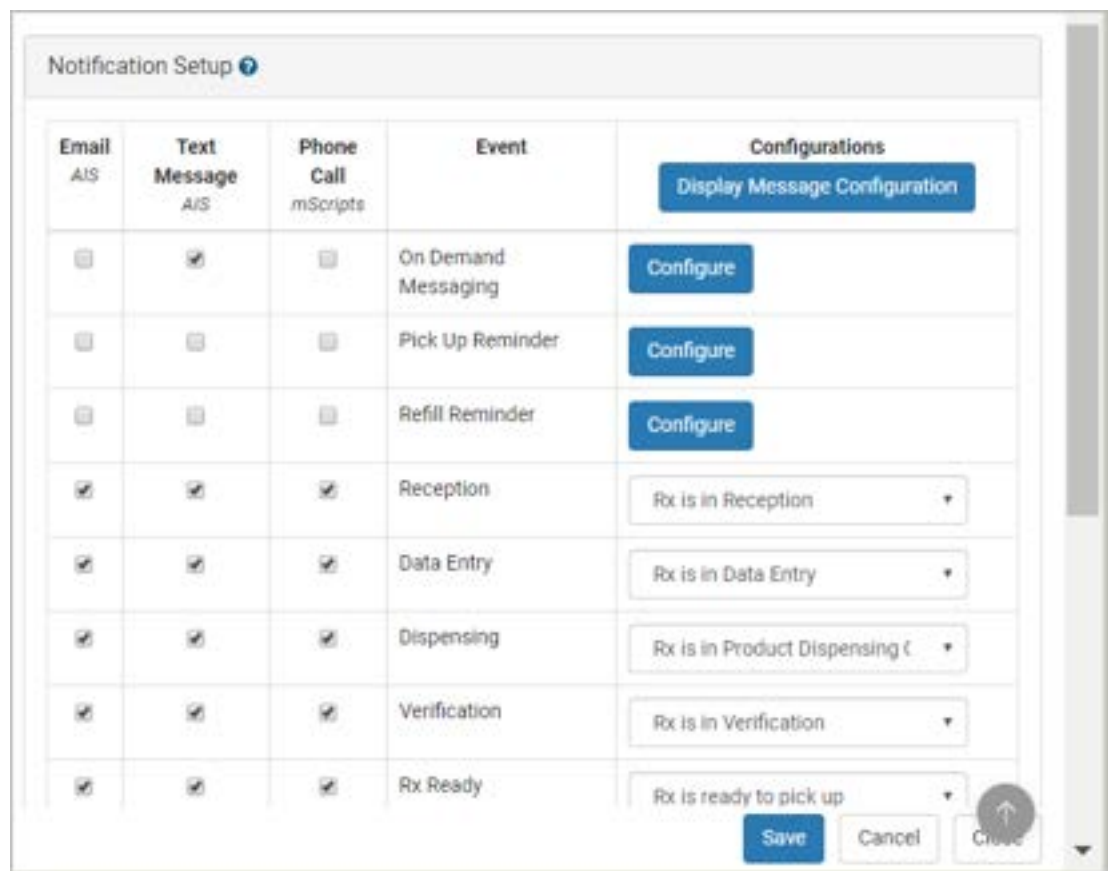
- 2) The list of Vendors currently selected across all **Communication Methods** will display within the **Vendor Configuration** window. For each **Vendor URL** that needs modified, input the new URL in the **Vendor URL** column.
- 3) Select the **Save** button to save your changes, or the **Cancel** button to return to the **Program Settings** window without saving any changes.

Notification Setup

The **Notification Setup** section allows you to configure what **Events** you want to allow patient notifications for. Within this section, a column will display for each supported **Communication Method** so that you can define what **Communication Methods** are available for each **Event**. When a patient is configured to receive notifications for an **Event**, when the **Event** occurs/is applicable for the patient, then the corresponding Vendor for the **Communication Method** selected for the **Event** will be notified.

The **Notification Setup** section has four main components, outlined below:

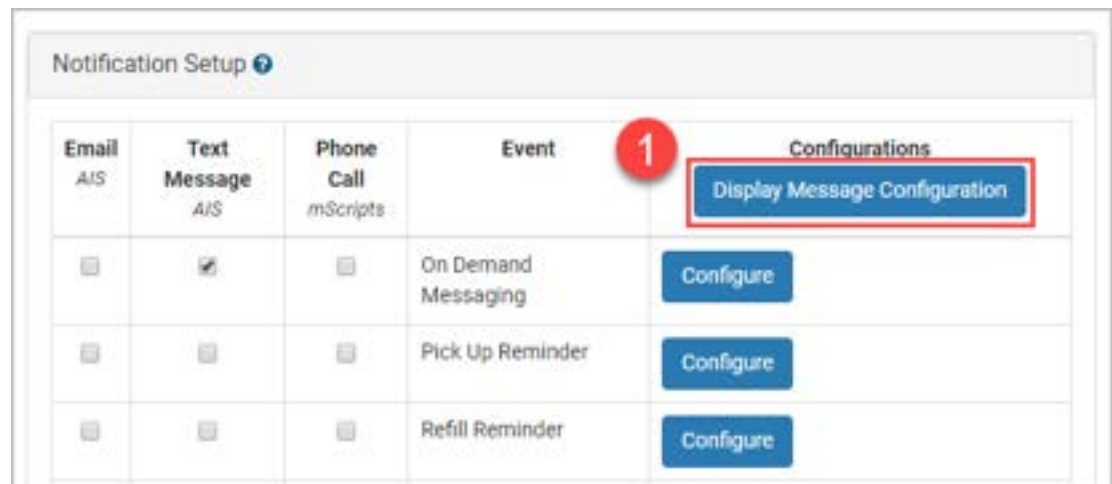
- [Display Message Configuration](#)
- [On Demand Messaging, Pick Up Reminder, and Refill Reminder Settings](#)
- [Communication Method Selection for Events](#)
- [Display Message Selection for Events](#)



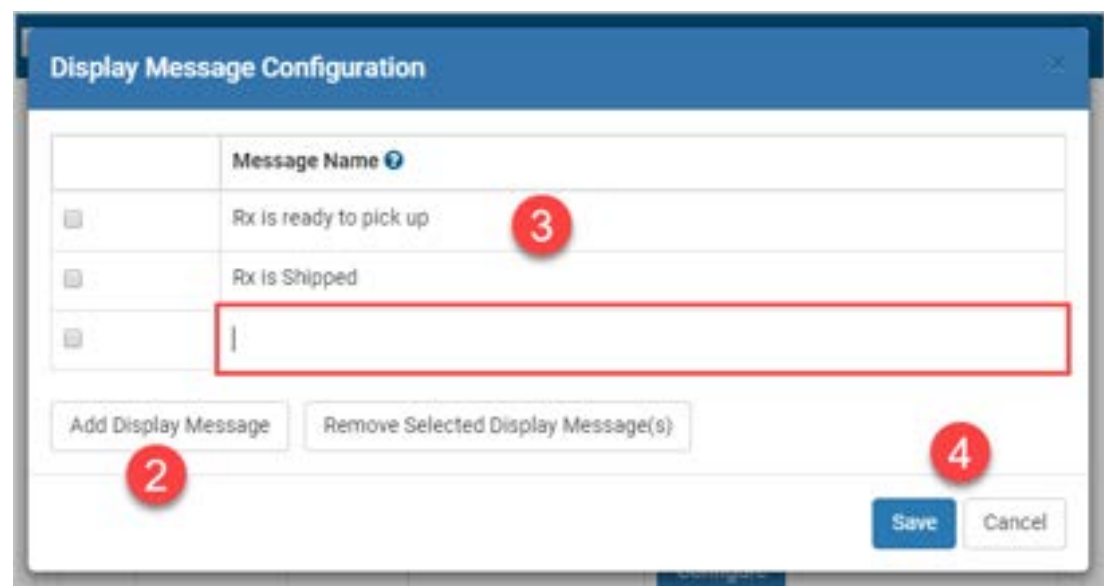
Display Message Configuration

Display Messages are customizable text that you can assign to each **Notification Setup Event**. The **Display Message** configured for an **Event(s)** displays within the **PCS Patient Configuration** window.

Adding Display Messages

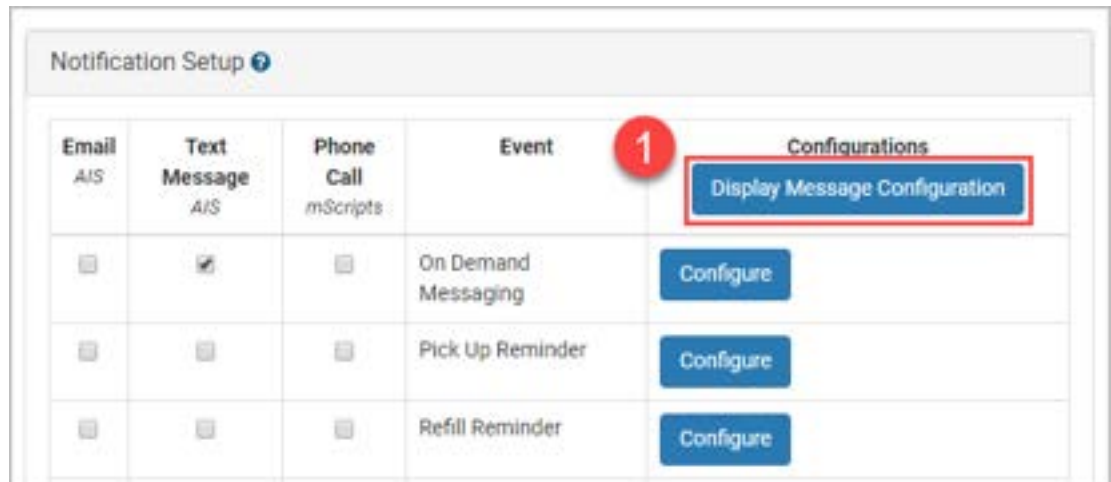


- 1) To add a **Display Message**, select the **Display Message Configuration** button in the **Notification Setup** section. The **Display Message Configuration** window displays.

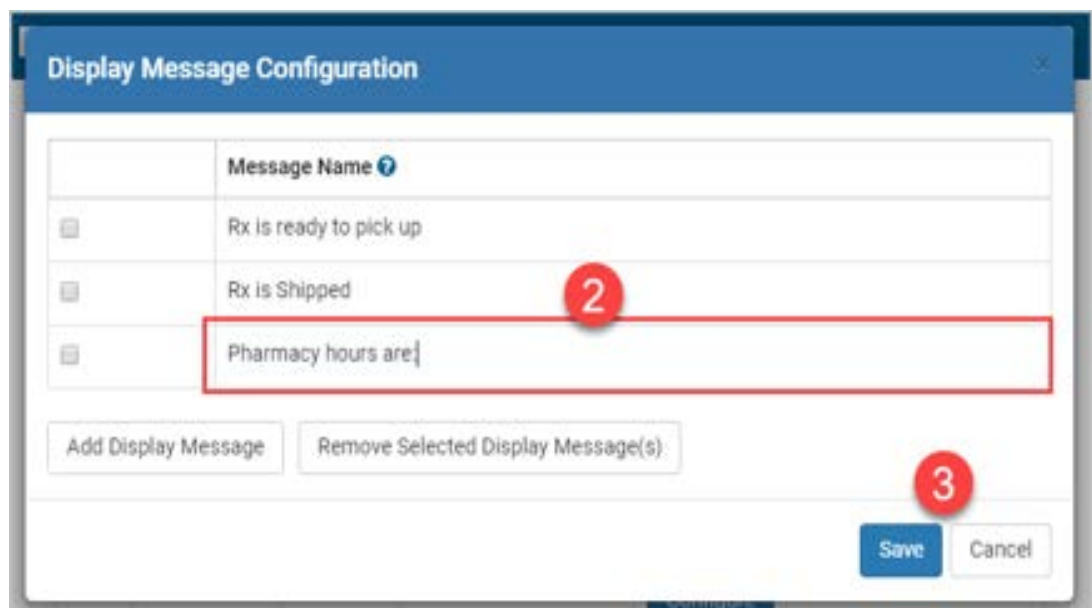


- 2) Scroll to the bottom of the **Message Name** list, if applicable and select the **Add Display Message** button. A new row appears at the bottom of the **Message Name** list.
- 3) Enter the desired **Display Message** text in the **Message Name** column.
- 4) Continue to add **Display Messages** by repeating steps 2-3. When all **Display Messages** have been added, select the **Save** button to save your changes, or the **Cancel** button to discard your changes.

Editing Display Messages

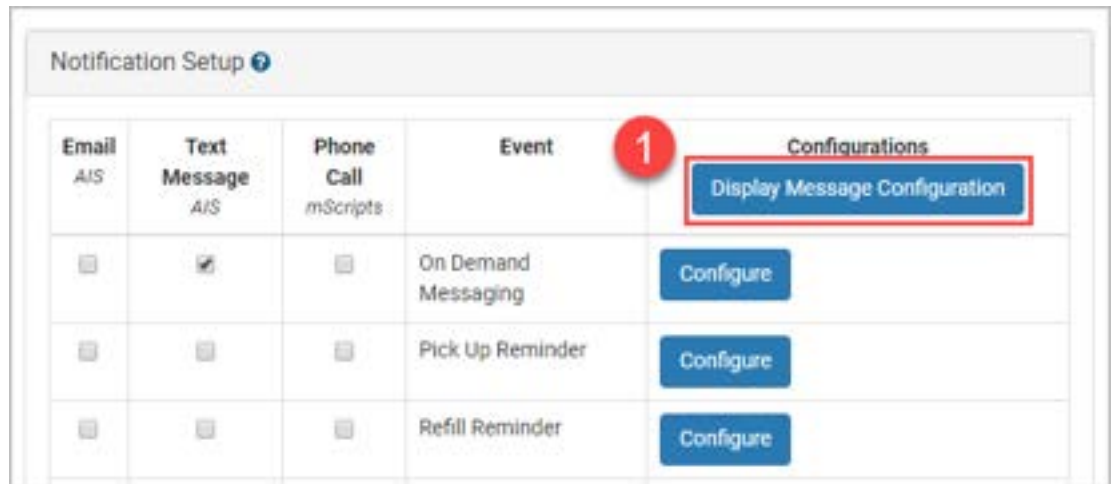


- 1) To edit a **Display Message**, select the **Display Message Configuration** button in the **Notification Setup** section. The **Display Message Configuration** window displays.

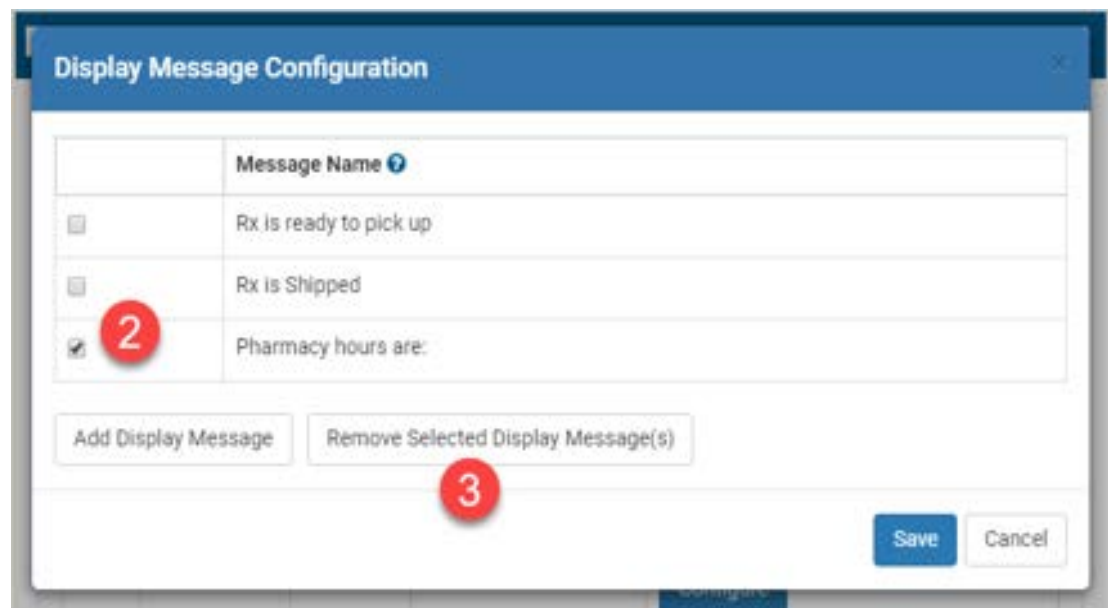


- 2) Locate the **Display Message** that needs edited within the **Message Name** list. Edit the **Display Message** text in the **Message Name** column.
- 3) Continue to edit **Display Messages** by repeating step 2. When all **Display Messages** have been edited, select the **Save** button to save your changes, or the **Cancel** button to discard your changes.

Removing Display Messages



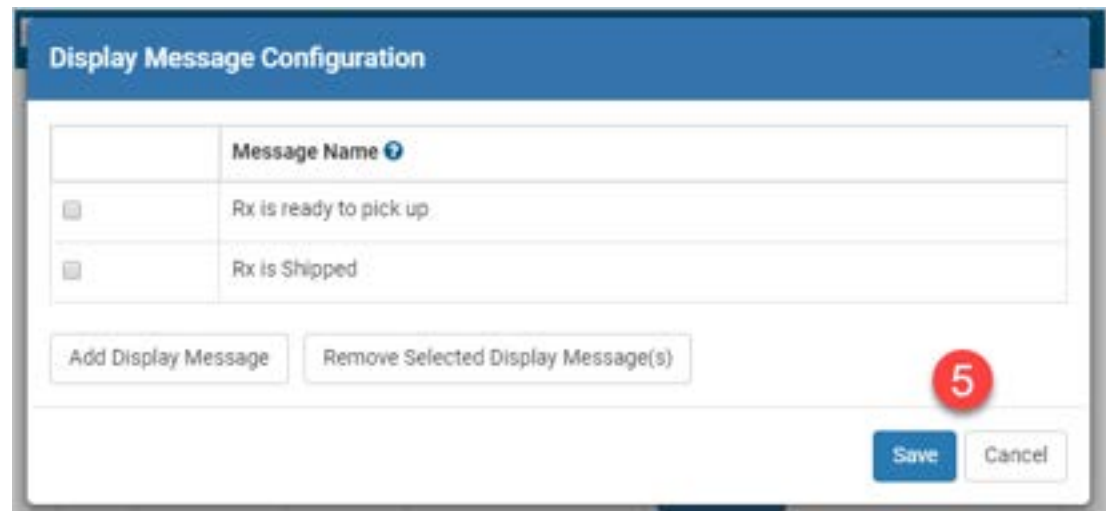
- 1) To remove a **Display Message**, select the **Display Message Configuration** button in the **Notification Setup** section. The **Display Message Configuration** window displays.



- 2) Select the checkbox(es) for the **Display Message(s)** you want to remove.
- 3) Select the **Remove Selected Display Message(s)** button.



- 4) Select **Yes** in the **Remove Display Message(s)** confirmation window to remove the selected **Display Message(s)**, or **No** to cancel the removal.



- 5) Select the **Save** button to save your changes, or the **Cancel** button to discard your changes.

On Demand Messaging, Pick Up Reminder, and Refill Reminder Settings

The **On Demand Messaging**, **Pick Up Reminder**, and **Refill Reminder Events** allow for additional configuration so that you can customize the **Events** to your specific needs.

On Demand Messaging

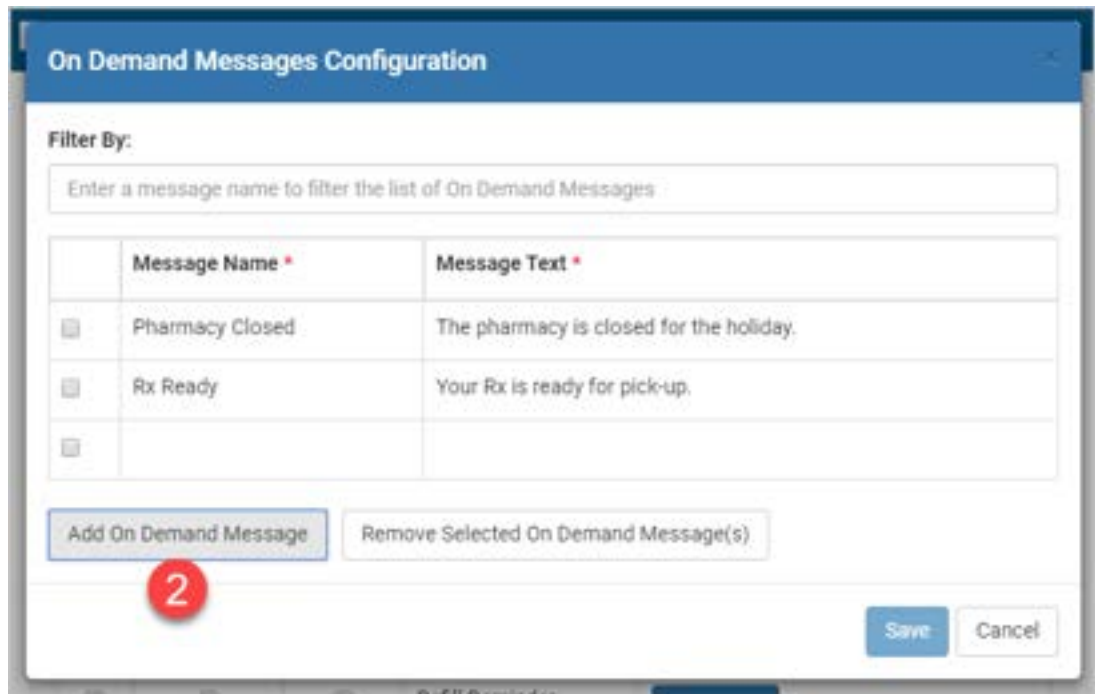
PCS allows you to define custom messages, called **On Demand Messages**, that can be sent to enrolled patients on an as-needed basis.

Adding On Demand Messages

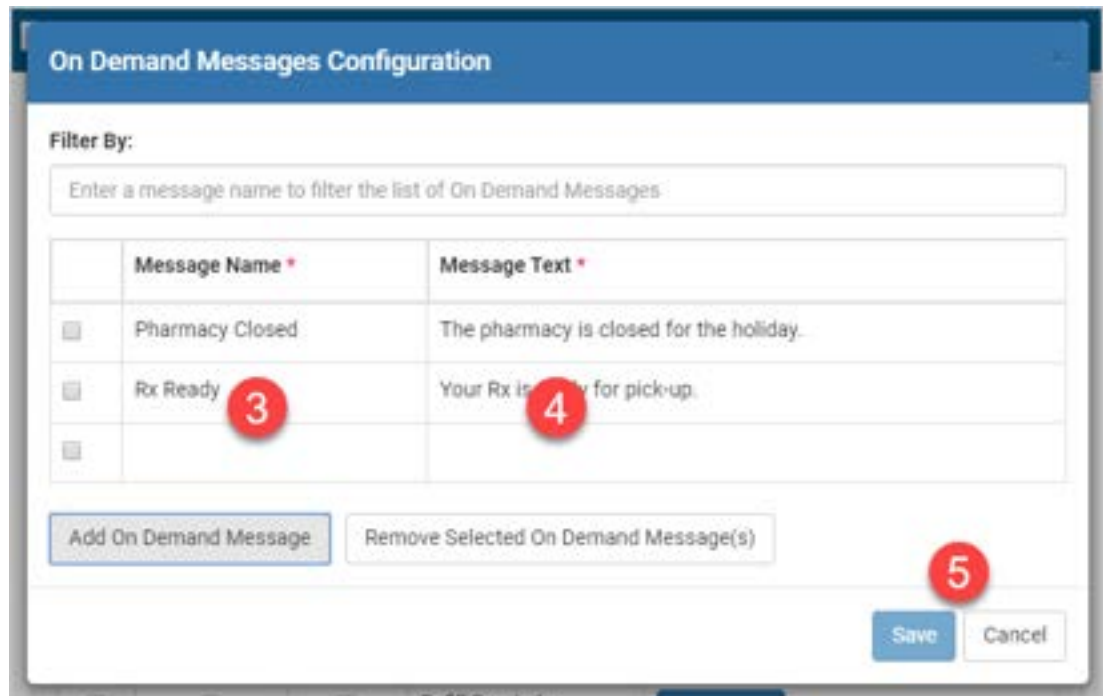
The screenshot shows a 'Notification Setup' window with a table of notification types and their configuration options. The 'On Demand Messaging' row has a red circle with the number '1' next to its 'Configure' button.

| Email A/S | Text Message A/S | Phone Call mScripts | Event | Configurations |
|--------------------------|-------------------------------------|---------------------------|---------------------|---|
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | On Demand Messaging | <input type="button" value="Display Message Configuration"/> <input <span="" style="color: red; font-weight: bold; border: 1px solid red; border-radius: 50%; padding: 2px;" type="button" value="Configure"/> 1 |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Pick Up Reminder | <input type="button" value="Configure"/> |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Refill Reminder | <input type="button" value="Configure"/> |

- 1) To add an **On Demand Message**, select the **Configure** button in the **Notification Setup** section. The **On Demand Messages Configuration** window displays.



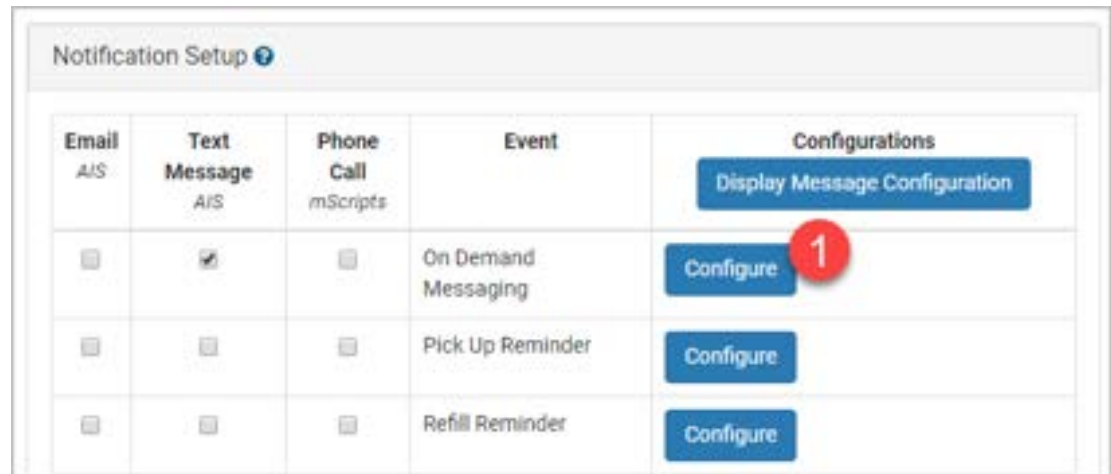
- 2) Scroll to the bottom of the list, if applicable and select the **Add On Demand Message** button. A new row appears at the bottom of the list.



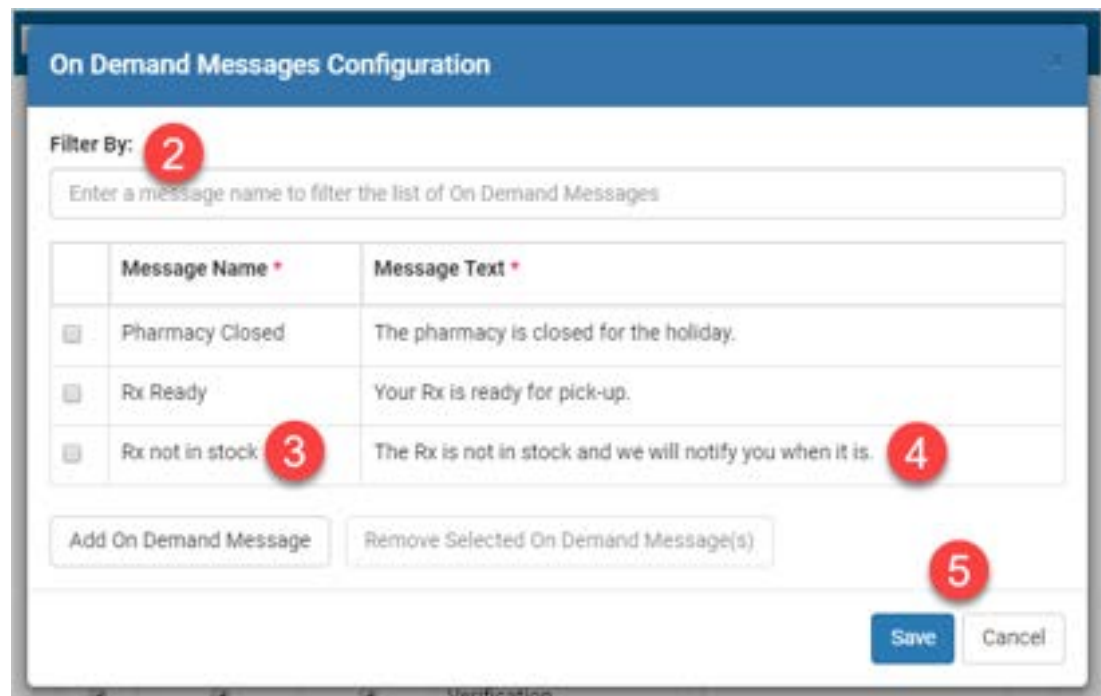
- 3) Enter the name of the **On Demand Message** in the **Message Name** column. The text entered in this column will display when sending an **On Demand Message** to a patient via the **PCS** tab within the **Clinical App**.
- 4) Enter the text associated to the **On Demand Message** in the **Message Text** column. The text entered in this column will be sent to the corresponding Vendor when the **On Demand Message** is sent to a patient.

- 5) When all the **On Demand Messages** have been added, select the **Save** button to save your changes, or the **Cancel** button to discard your changes.

Editing On Demand Messages



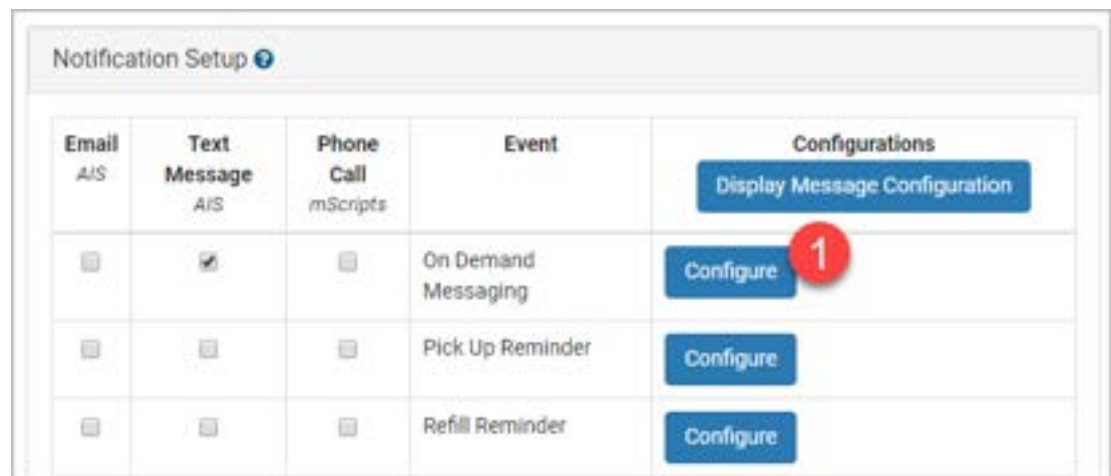
- 1) To edit an **On Demand Message**, select the **Configure** button in the **Notification Setup** section. The **On Demand Messages Configuration** window displays.



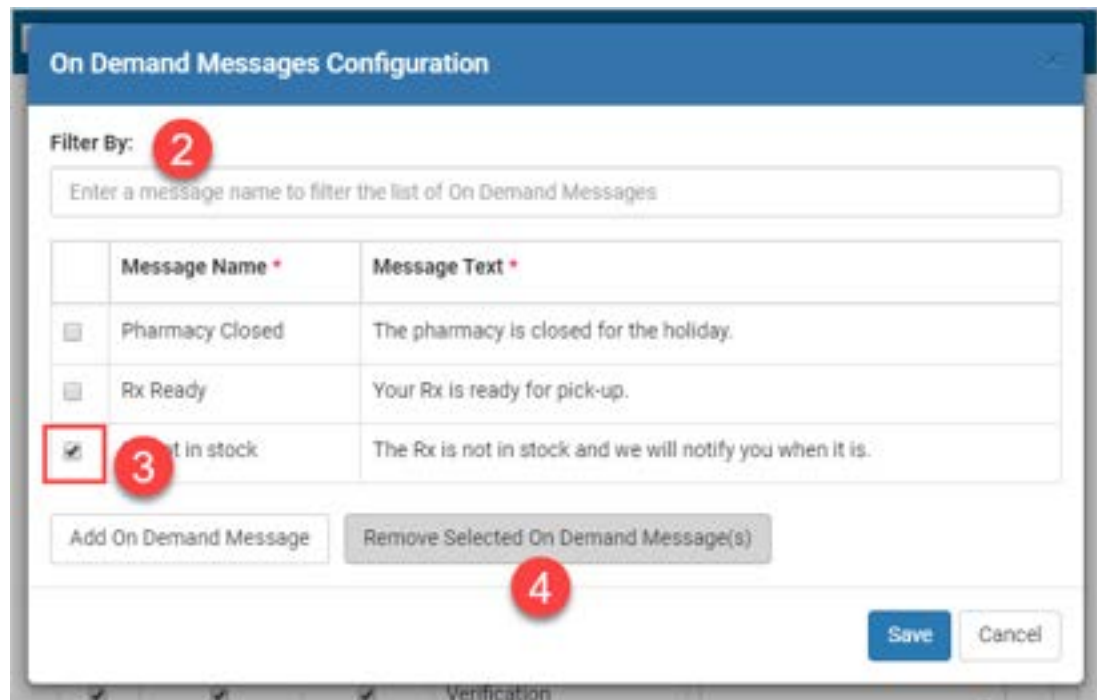
- 2) Use the **Filter By** field to filter the list of existing **On Demand Messages**. Locate the **On Demand Message** that needs edited within the list.

- 3) Edit the name of the **On Demand Message** in the **Message Name** column, if needed. The text entered in this column will display when sending an **On Demand Message** to a patient via the **PCS** tab within the **Clinical App**.
- 4) Edit the text associated to the **On Demand Message** in the **Message Text** column, if needed. The text entered in this column will be sent to the corresponding Vendor when the **On Demand Message** is sent to a patient.
- 5) Continue to edit **On Demand Messages** by repeating steps 2-4. When all **On Demand Messages** have been edited, select the **Save** button to save your changes, or the **Cancel** button to discard your changes.

Removing On Demand Messages



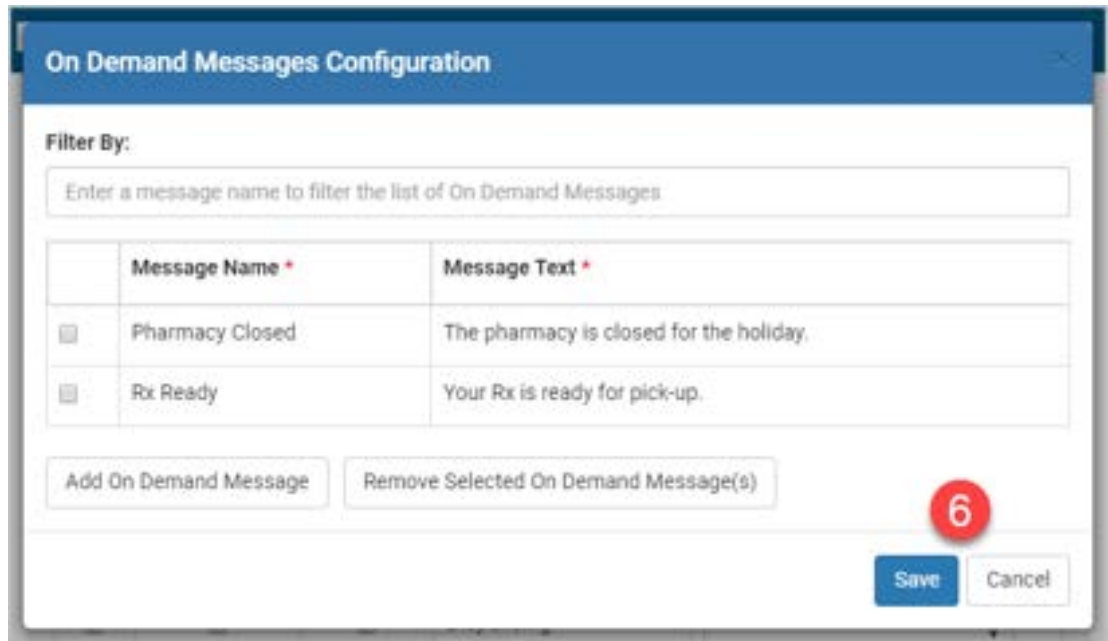
- 1) To remove an **On Demand Message**, select the **Configure** button in the **Notification Setup** section. The **On Demand Messages Configuration** window displays.



- 2) Use the **Filter By** field to filter the list of existing **On Demand Messages**. Locate the **On Demand Message(s)** that needs removed within the list.
- 3) Select the checkbox(es) for the **On Demand Message(s)** you want to remove.
- 4) Select the **Remove Selected On Demand Message(s)** button.



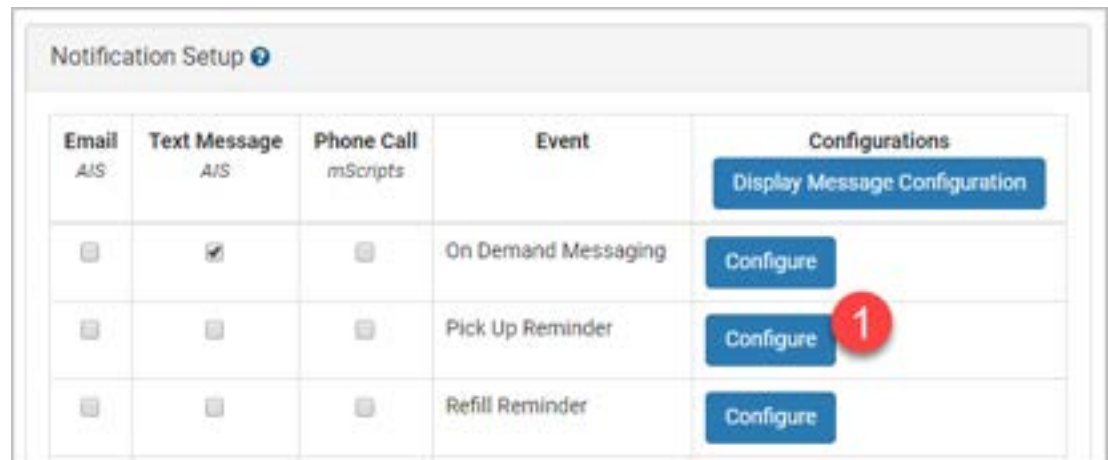
- 5) Select **Yes** in the **Remove On Demand Message(s)** confirmation window to remove the selected **On Demand Message(s)**, or **No** to cancel the removal.



- 6) Select the **Save** button to save your changes, or the **Cancel** button to discard your changes.

Pick Up Reminders

Pick Up Reminders are automatically generated **Events** that notify patients when an order is past due for pick up.



- 1) To manage **Pick Up Reminders**, select the **Configure** button in the **Notification Setup** section. The **Pick Up Reminder Configuration** window displays.

2) To support **Pick Up Reminders**, you must configure the following settings:

- **Auto-Notify the Patient the first time after (x) days.**
- **Repeat Auto-Notification every (x) days after that.**
- **Stop Auto-Notification after a total of (x) days.**

Note: You must enter values for each of the three settings to support **Pick Up Reminders**. You cannot save your changes unless all three settings have been populated.

3) Select the **Save** button to save your changes, or the **Cancel** button to discard your changes.

Note: **Pick Up Reminder** settings can be edited at any time.

Refill Reminders

Refill Reminders are automatically generated **Events** that notify patients of upcoming refills.

| Email | Text Message | Phone Call | Event | Configurations |
|--------------------------|-------------------------------------|--------------------------|---------------------|-------------------------------|
| AIS | AIS | mScripts | | Display Message Configuration |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | On Demand Messaging | Configure |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Pick Up Reminder | Configure |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Refill Reminder | Configure |

- 1) To manage **Refill Reminders**, select the **Configure** button in the **Notification Setup** section. The **Refill Reminder Configuration** window displays.

Refill Reminder Configuration

Before a Refill is due, have the Patient Communication Program Auto-Notify the patient with the settings below.

| | | |
|--|---|--------------------------------|
| Auto-Notify the Patient: * | 1 | days before the Refill is due. |
| Repeat Auto-Notification every: * | 2 | days after that. |
| Stop Auto-Notification after a total of: * | 3 | days. |

Save Cancel

- 2) To support **Refill Reminders**, you must configure the following settings:

- **Auto-Notify the Patient (x) days before the Refill is due.**
- **Repeat Auto-Notification every (x) days after that.**
- **Stop Auto-Notification after a total of (x) days.**

Note: You must enter values for each of the three settings to support **Refill Reminders**. You cannot save your changes unless all three settings have been populated.

- 3) Select the **Save** button to save your changes, or the **Cancel** button to discard your changes.

Note: **Refill Reminder** settings can be edited at any time.

Communication Method Selection for Events

Within the **Notification Setup** section, a column will display for each supported **Communication Method** so that you can define what **Communication Methods** are available for each **Event**.

| Email AIS | Text Message AIS | Phone Call mScripts | Event |
|-------------------------------------|-------------------------------------|-------------------------------------|---------------------|
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | On Demand Messaging |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | Pick Up Reminder |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | Refill Reminder |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Reception |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Data Entry |

When the checkbox for a **Communication Method** is selected for an **Event**, the **Communication Method** will display as an available option when configuring the **Event** for a patient.



Important: For **On Demand Messaging, Pick Up Reminder, and Refill Reminder Events**, the **Event** must be configured and at least one **Communication Method** must be selected for the **Event** to display within the **PCS Patient Configuration** window. For all other **Events**, a **Display Message** and at least one **Communication Method** must be selected for an **Event** to display within the **PCS Patient Configuration** window. For more information on **Display Messages**, refer to the [Display Message Selection for Events](#) section below.

Display Message Selection for Events

A **Display Message** is customizable text that you can assign to a **Notification Setup Event**. The **Display Message** configured for an **Event(s)** displays within the **PCS Patient Configuration** window.



Important: For **On Demand Messaging, Pick Up Reminder, and Refill Reminder Events**, the **Event** must be configured and at least one **Communication Method** must be selected for the **Event** to display within the **PCS Patient Configuration** window. For all other **Events**, a **Display Message** and at least one **Communication Method** must be selected for an **Event** to display within the **PCS Patient Configuration** window. For

more information on **Communication Method** selection, refer to the [Communication Method Selection for Events](#) section above.

For each **Event**, use the **Select Display Message** drop-down in the **Configurations** column to select the desired **Display Message**.

Note: A **Display Message** cannot be configured for the **On Demand Messaging**, **Pick Up Reminder**, and **Refill Reminder Events**.

| | | | | |
|-------------------------------------|-------------------------------------|-------------------------------------|--------------|----------------------|
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Reception | <input type="text"/> |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Data Entry | <input type="text"/> |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Dispensing | <input type="text"/> |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Verification | <input type="text"/> |

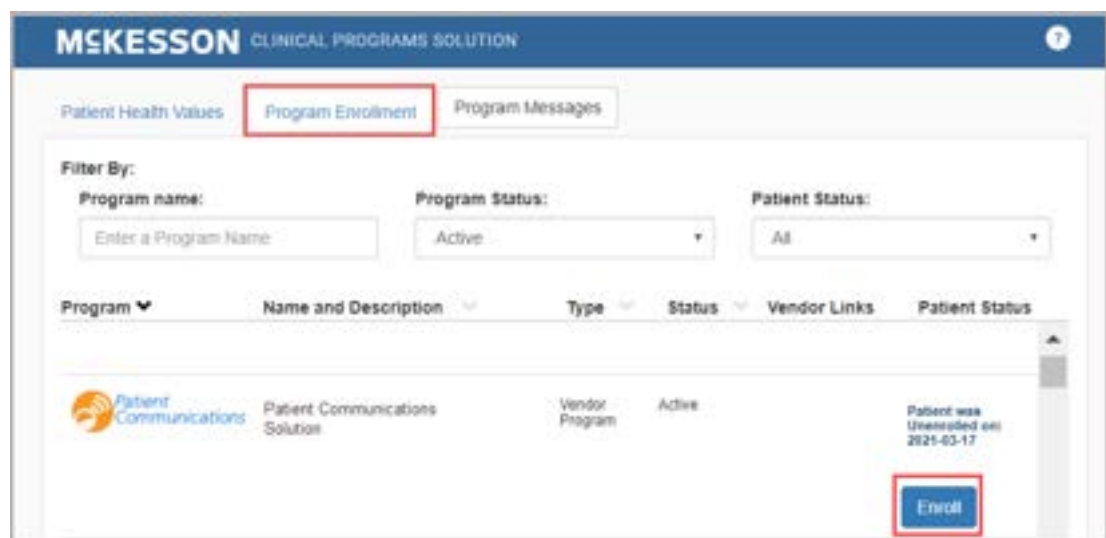
When you are done making all PCS configuration updates, select the **Save** button to save your changes, or the **Cancel** button to discard your changes.

Enrolling Patients in PCS

Patients are enrolled in PCS the same way they are enrolled in other CPS Vendor Programs, through an Enrollment Alert or the **Program Enrollment** tab in the CPS Patient Profile. Additionally, new patients can be automatically enrolled in PCS if desired.

Notes:

- For more information on viewing and editing Program enrollments in CPS, see the section on [Viewing and Editing Program Enrollments](#) in [Chapter 10: Viewing the CPS Patient Profile](#).
- For more information on new patient automatic enrollment, see the [PCS Automatic Enrollment](#) section.

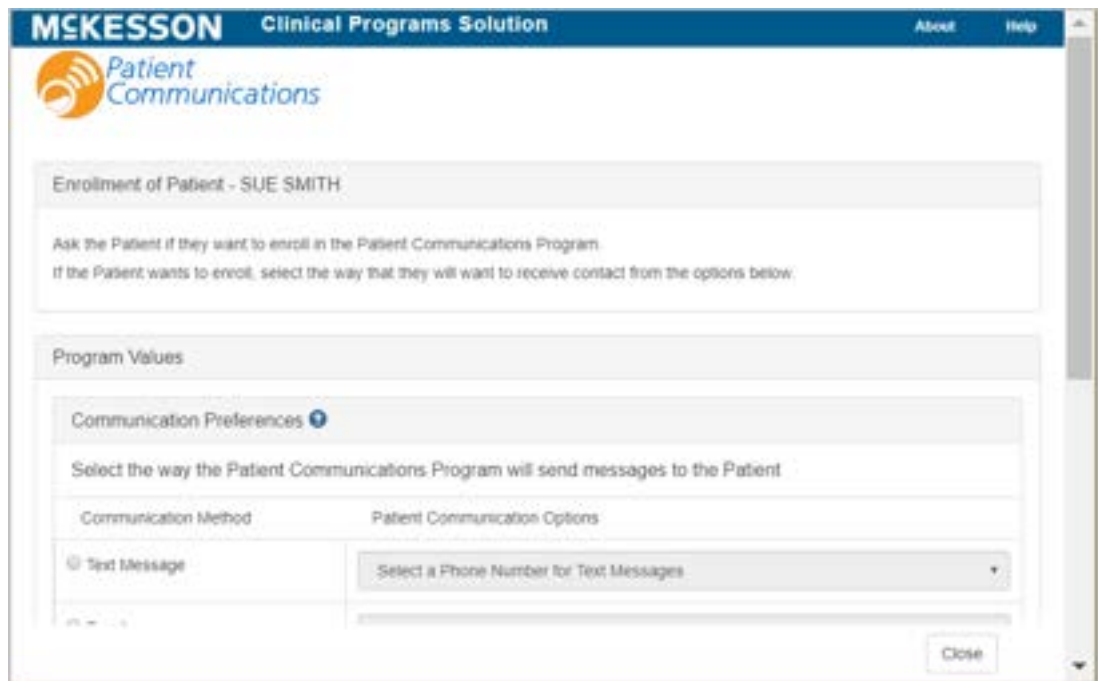


When enrolling a patient in PCS using the CPS Patient Profile, first navigate to the **Program Enrollment** tab and then select the **Enroll** button next to the **Patient Communications Solution** Program to start the enrollment process.

Notes:

- You can also enroll patients in PCS through the **Clinical App** or **Task Queue** by selecting the **Enroll** button in a PCS Enrollment Alert.
- For more information on enrolling patients in other CPS Programs through the **Clinical App**, see the section on [Enrolling a Patient](#) in [Chapter 7: Viewing Alerts in the Clinical App](#).

After selecting the **Enroll** button, the **PCS Patient Configuration** window displays.



Patient Communication Preferences

The top section of the **PCS Patient Configuration** window, **Communication Preferences**, allows you to select the patient’s phone number for text messages and phone calls (this can be the same phone number for both or different phone numbers), as well as their email address for email communications. Use the **Patient Communication Options** drop-down to set each **Communication Method** for the patient.

Note: If **PCS Easy Mode** is enabled, you will only be able to set one **Communication Method** for the patient, as shown below.

McKESSON Clinical Programs Solution About Help

Program Values

Communication Preferences

Select the way the Patient Communications Program will send messages to the Patient

| Communication Method | Patient Communication Options |
|---|---|
| <input checked="" type="radio"/> Text Message | (412) 633-3325 - Mobile |
| <input type="radio"/> Email | Select an Email Address for Email Messages |
| <input type="radio"/> Phone Call | Select a Phone Number to receive Voicemail Messages |

Notification Setup

Select a Communication Preference that will be used to send a Display Message to the Patient

Enroll Cancel Close

If needed, use the radio buttons in the **Communication Method** column to change the patient’s preferred **Communication Method**.

Patient Notification Setup

The bottom section of the **PCS Patient Configuration** window, **Notification Setup**, allows you to select what **Events** the patient wants to be notified of, as well as the **Communication Method** for each **Event**.

Notification Setup

Select a Communication Preference that will be used to send a Display Message to the Patient

| Display Message | Communication Preference |
|------------------------|--------------------------|
| On Demand Messaging | TEXT MESSAGE |
| Rx is ready to pick up | TEXT MESSAGE |
| Rx is Shipped | TEXT MESSAGE |

Note: Only supported **Events** will display in the **Notification Setup** section. To modify what **Events** are supported, see the [Notification Setup](#) section.

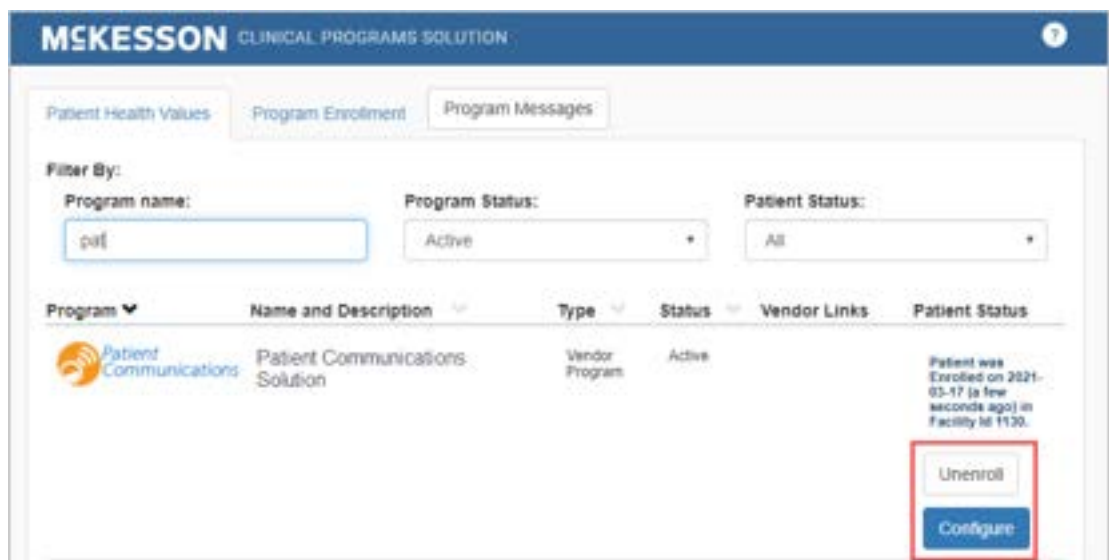
To configure an **Event** for the patient, use the drop-down in the **Communication Preference** column to select the **Communication Method** that the patient prefers for that **Event**.

Notes:

- A **Communication Method** will not display as an available option in the **Communication Preference** drop-down when the **Event** does not support that **Communication Method**.
- A **Communication Method** will display as disabled in the **Communication Preference** drop-down when the patient does not have a value selected for that **Communication Method**.
- If **PCS Easy Mode** is enabled, the patient’s preferred **Communication Method** will be automatically selected for all **Events** that support that **Communication Method**. Additionally, an **Event** cannot be set to a **Communication Method** that is different than the preferred **Communication Method** for the patient.
- The **Notification Setup** section will be disabled and display as read-only when the **Lock Patient Notification Setup** option is turned on. For more information on this option, refer to [“Lock Patient Notification Setup” on page 14-157](#).

When all selections are made, select the **Enroll** button to complete the enrollment, or the **Cancel** button to discard your changes and cancel the enrollment.

After enrolling a patient in PCS, note that the **Enroll** button on the **Program Enrollment** tab changes to **Unenroll** and a **Configure** button appears.



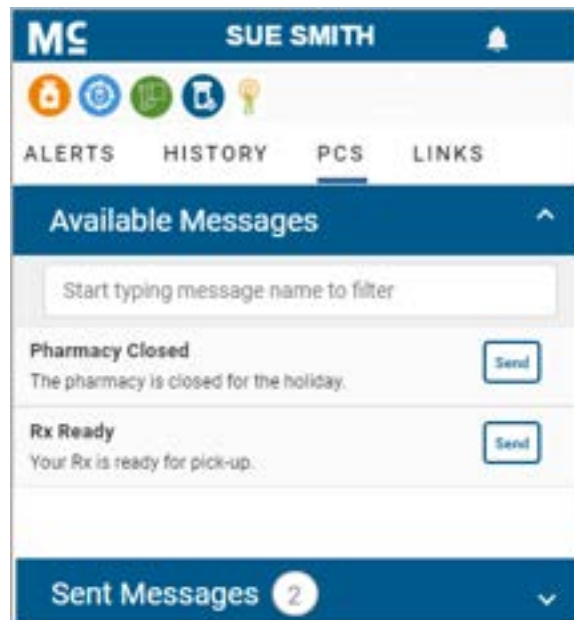
Selecting the **Configure** button allows you to edit the PCS configuration defined for the patient. Selecting the **Unenroll** button will unenroll the patient from the Program.

Note: When you unenroll a patient, no PCS configuration is retained for the patient.

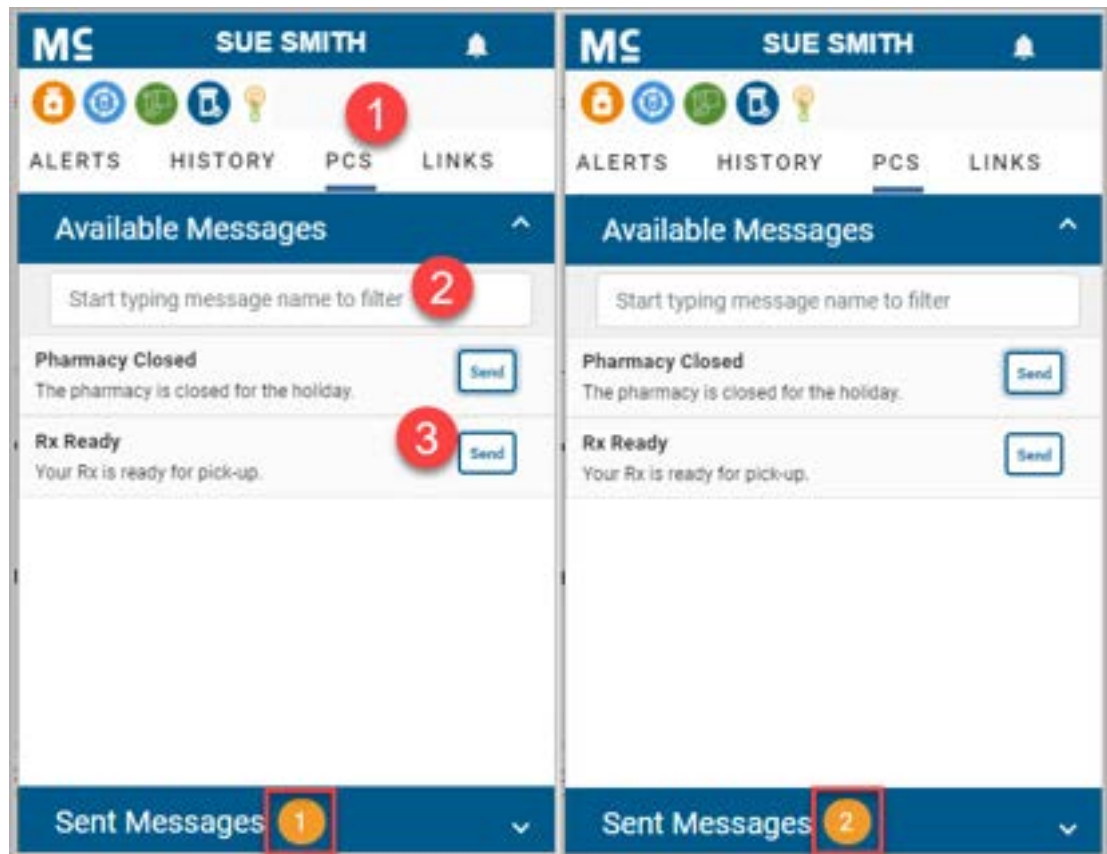
Accessing On Demand Messages in the Clinical App

When the patient in context is enrolled in PCS, you will see a **PCS** tab in the **Clinical App**. You can use this tab to easily access **PCS On Demand Messaging**.

The **PCS** tab includes an **Available Messages** section and a **Sent Messages** section. By default, the **Available Messages** section will be expanded and will include all **PCS On Demand Messages** configured for the logged in facility.

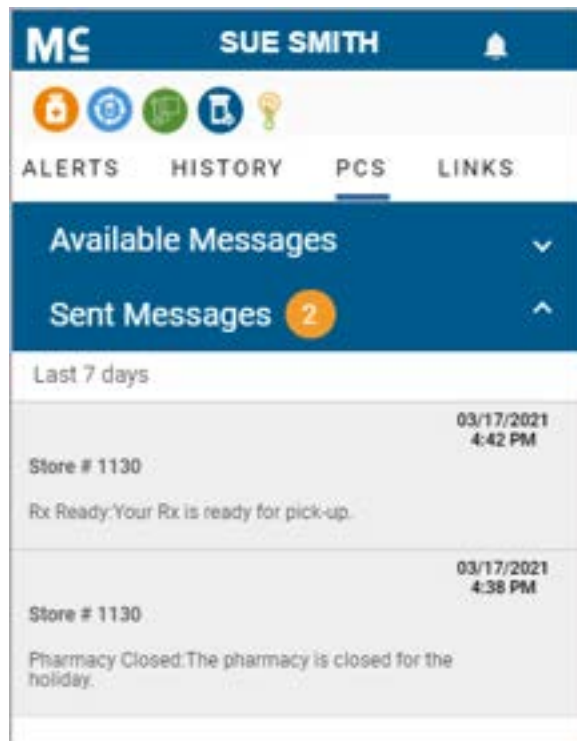


Sending a PCS On Demand Message



- 1) Open the **Clinical App** and select the **PCS** tab. For more information on the **Clinical App**, see [Chapter 7: Viewing Alerts in the Clinical App](#).
- 2) Begin typing the desired message to filter the **Available Messages** list if needed.
- 3) Select the message from the list. You will see the message text and a **Send** button. Select the **Send** button to send the selected message to the patient in context.
- 4) To notify you that the message was successfully sent, the numerical count in the **Sent Messages** header will highlight orange and update to include the recently sent message. The numerical count in the **Sent Messages** header will remain orange until the **Sent Messages** section is expanded.

Note: The **Sent Messages** section includes 7 days of historical PCS **On Demand Message** for the patient in context. Historical PCS **On Demand Messages** will sort newest to oldest, with any messages sent while the patient is in context highlighted in gray (as shown below). Each historical PCS **On Demand Message** will display the user, timestamp, store number, and text associated with the message. For convenience, a numerical count of sent messages displays within the **Sent Messages** header.

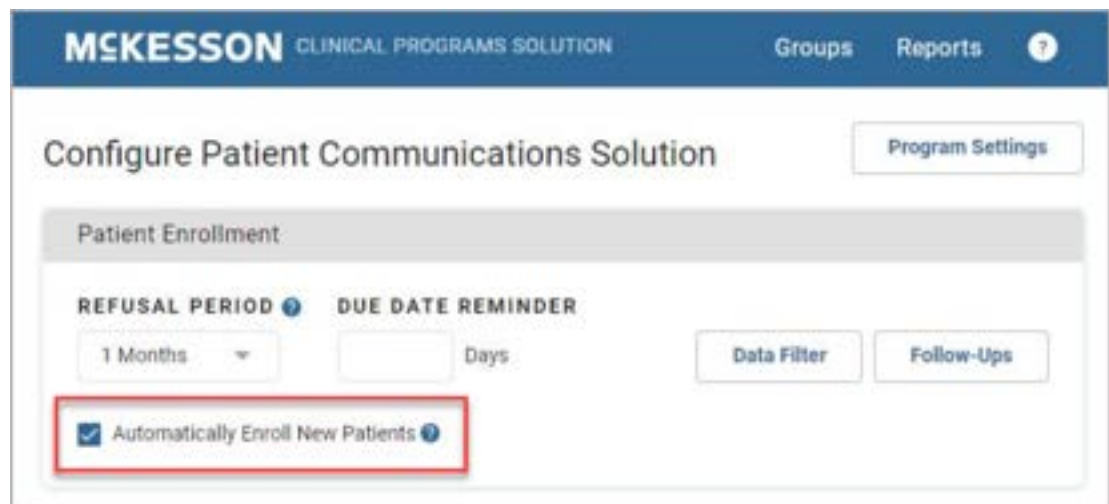


Vendor Program Automatic Enrollment

In addition to manual Program enrollment, CPS provides the option to automatically enroll new patients into select Vendor Programs.

Note: New patient automatic enrollment is only available for patient profiles created via the **Add Patient** functionality within EnterpriseRx.

When a Vendor supports new patient automatic enrollment, the **Automatically Enroll New Patients** checkbox will display in the **Patient Enrollment** section within **CPS Program Admin**.



Note: The **Automatically Enroll New Patients** checkbox will be available at a Corporate Root or facility level and will be unselected by default.

When the **Automatically Enroll New Patients** checkbox is selected for an enabled Vendor Program in the logged in facility, immediately after a new EnterpriseRx Patient Profile is successfully saved, the patient will be automatically enrolled in the Vendor Program.

Note: Prior to selecting the **Automatically Enroll New Patients** checkbox, please coordinate with the appropriate Vendor(s).

PCS Automatic Enrollment

When a new patient is automatically enrolled in PCS, the patient's PCS **Communication Preferences** will be systematically set using the information provided in the EnterpriseRx Patient Profile:

- When a **Phone** number is provided in the EnterpriseRx Patient Profile, the **Phone Call PCS Communication Method** will be set to the EnterpriseRx **Phone** number.
- When a **Cell** number is provided in the EnterpriseRx Patient Profile, the **Text Message PCS Communication Method** will be set to the EnterpriseRx **Cell** number.
- When a primary **Email** address is provided in the EnterpriseRx Patient Profile, the **Email PCS Communication Method** will be set to the EnterpriseRx primary **Email** address.

Notes:

- If **PCS Easy Mode** is enabled, when a new patient is automatically enrolled in PCS, the patient's preferred **Communication Method** will be automatically selected using the priority defined in the **Select the Priority for Patient Enrollment** column within the **Program Settings** window in Program Admin. Additionally, as part of the enrollment, the patient's **Notification Setup** will be automatically configured based upon their preferred **Communication Method**. The **Notification Setup** section can, however, be modified if needed.
- PCS is only available for use with EnterpriseRx. Vendors are only available if certified.

15. CPS and APS Integration

McKesson's Adherence Performance Solution

McKesson's Adherence Performance Solution (APS) includes an interactive dashboard that provides information on patient adherence for Cholesterol, Diabetes, Hypertension, COPD, as well as information on gap therapy for diabetic patients without a statin and elderly patients on high risk medications. Please note, COPD adherence is available only to CPS Premium customers. CPS works with APS to bring real-time data on patient medication adherence for these three disease states into pharmacy workflow.

APS is modeled after the CMS (Centers for Medicare and Medicaid Services) Star Ratings calculations. By individual pharmacy and/or pharmacy chain, APS identifies non-adherent patients using the list of medications, including generic equivalents, published by CMS for the disease states being measured. APS uses data directly from your pharmacy management system to calculate each patient's PDC (Proportion of Days Covered) to measure their adherence. A patient's PDC is calculated by dividing the number of refills within a measurement window by the number of days in the measurement window. For example, if a patient is on diabetes treatment, the number of refills the patient receives over a 12-month period is reviewed. If a patient refills a prescription with a 30-day supply 9 times within 12 months, they have 270 days of 365 days covered. The proportion of days covered is found by dividing 270 by 365, which gives 0.74 or 74%. Similar to CMS, APS uses the criteria that 80% PDC and above is considered adherent.

APS supports four types of adherence measurements using PDC scores:

- Cholesterol
- Diabetes
- Hypertension
- COPD

In addition, APS identifies elderly patients (60 or older) using high risk medications (HRM), as well as diabetic patients not on a statin (Statin Use in Persons with Diabetes, or SUPD). The APS score for HRM is either a 0, for patients who received two or more Rx fills for the same HRM, or a 1, for patients who received no or less than two fills of the same HRM. SUPD applies to patients between 40 and 75 years old as of the last day of the measurement window. This measure applies to patients on diabetic medications with at least one statin fill during the measurement window. The SUPD score is either a 1

(adherent; the patient filled a statin in the measurement window) or a 0 (non-adherent; the patient did not fill a statin in the measurement window).

The patient data APS receives from your pharmacy management system is rolled up to the individual pharmacy level to determine the percentage of adherent patients for that pharmacy. APS calculates the percentage of adherent patients per pharmacy and assigns a 1-5 adherence rating following the scales published by CMS.

With APS, your pharmacy can identify non-adherent patients and the number of patients needed to improve your pharmacy's rating. Once patients are identified, you can leverage both APS and McKesson's Clinical Programs Solution to target and intervene with non-adherent patients.

CPS and APS Integration

The CPS and APS integration provides “real-time” data on patient adherence within pharmacy workflow. On a weekly and/or daily basis, APS notifications are created in CPS to Alert pharmacy staff of non-adherent patients.

Types of APS Notifications in CPS

There are two types of APS notifications supported in CPS: **Patient Adherence Alerts** and **Key-Value Pair Measures**.

Patient Adherence Alerts contain patient adherence details and display in the CPS **Clinical App** when the patient is context, as well as in the CPS **Task Queue** outside of prescription processing.

MC MIKE SMITH

Alerts

Adherence Performance Solution

This Patient is non-adherent. Update the Patient's status using the APS Profile button below.

Patient Statistics (PDC 12)

| | | | |
|--------------|---|-------------|---|
| 0.84 CHOL | ↑ | 0.79 HYP | ↓ |
|--------------|---|-------------|---|

Last Reviewed Date - Follow Up Date :

Drug Details

| DRUG | RX# | LAST COVERAGE |
|---------------------------------------|---------|---------------|
| ATORVASTATIN CALCIUM 20MG TABS (CHOL) | 3486839 | 07/30/2020 |
| LOSARTAN POTASSIUM 50MG TABS (HYP) | 2579944 | 07/07/2020 |

Patient Notes

2020-07-17 - aps-np-admin (Phone)
Spoke to patient via phone

Severity: Low Expires: 07/22/2020

Received: 07/17/2020 3:28 PM

[APS Profile](#) [Resolve](#)

Key-Value Pair Measures contain adherence measures and are created on a weekly basis for all measured patients. You can view a patient’s adherence measures using the **Patient Health Values** tab within the CPS **Patient Profile**.

The screenshot shows the 'Clinical Programs Solution' interface. At the top, there are tabs for 'Patient Health Values', 'Program Enrollment', and 'Program Messages'. Below these is a filter section with a text input field and buttons for 'Past Month', 'Past 3 Months', 'Past 6 Months', 'Past Year', and 'All'. An 'Export' button is also present. The main area contains a table with the following data:

| Program | Field Name | Field Value | Received Date |
|--------------------------------|------------------|-------------|--------------------|
| Adherence Performance Solution | CHOLESTEROL PDC | 0.71 | 09/06/2019 04:18PM |
| Adherence Performance Solution | HYPERTENSION PDC | 0.71 | 09/06/2019 04:18PM |
| Adherence Performance Solution | DIABETES PDC | 0.63 | 09/06/2019 04:18PM |
| Adherence Performance Solution | SUPD PDC | 1 | 09/06/2019 04:18PM |
| Adherence Performance Solution | CHOLESTEROL PDC | 0.69 | 08/30/2019 03:18PM |
| Adherence Performance Solution | HYPERTENSION PDC | 0.69 | 08/30/2019 03:18PM |

Configuring APS Notifications in CPS

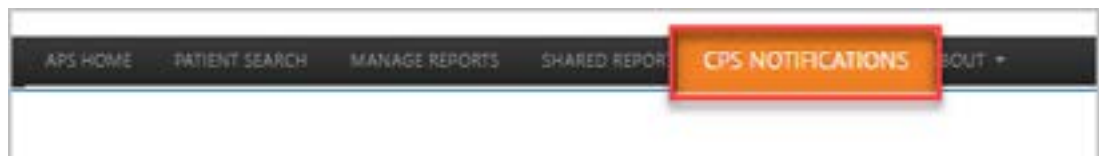
The **CPS NOTIFICATIONS** menu option in APS allows you to modify the configuration of APS related notifications that are sent to CPS.

Note: The **CPS NOTIFICATIONS** menu option will only be available if you have the **APS-CUSTOMER-ADMIN** role.

After opening **CPS Notifications**, you can enable/disable **Patient Adherence Alerts** and **Weekly Key-Value Pair Measures**, as well as specify the **PDC Selection** (6 or 12 month) and **Facility Selection** that should be used for your pharmacies. Additionally, you can configure **Filter Conditions**, such as yearly adherence status and patient reviewed state, that you want to apply to **Patient Adherence Alerts**.

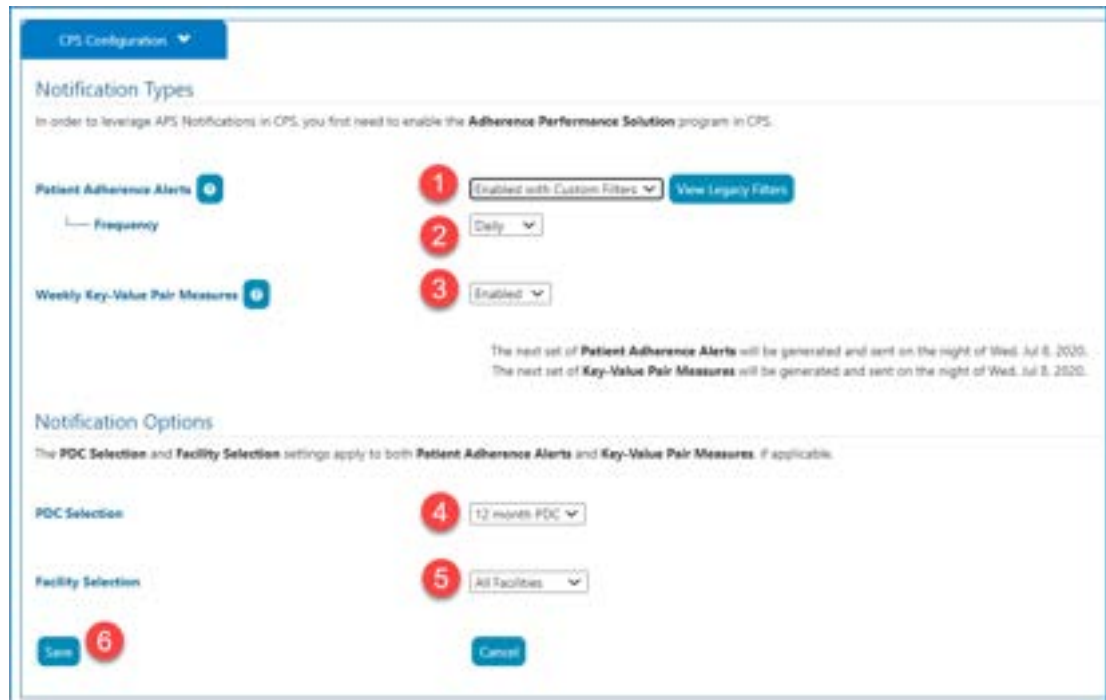
CPS Configuration

To get started, first select the **CPS NOTIFICATIONS** menu option in APS.



The **CPS Notifications** window will display so that you can customize the **Notification Types** and **Notification Options** that you want to support for your pharmacy.

Note: In order to leverage APS notifications in CPS, you first need to enable the **Adherence Performance Solution** Program. From **CPS Program Admin**, enter **Adherence Performance Solution** in the **Filter By** field. Once the Program displays in the list, select the **Enable** button.



- 1) Use the **Patient Adherence Alerts** drop-down to select the appropriate setting. Available settings include:
 - **Enabled with Legacy Filters:** Legacy Filters will be used to determine what **Patient Adherence Alerts** are generated. To view your **Legacy Filters**, select the **View Legacy Filters** button.
 - **Enabled with Custom Filters:** Custom Filters will be used to determine what **Patient Adherence Alerts** are generated. If selected, a **Manage Filters** section that allows you to create **Custom Filters** will appear below the **CPS Configuration** section.
 - **Disabled:** **Patient Adherence Alerts** will not be generated.
- 2) Select **Daily** or **Weekly** from the **Frequency** drop-down to configure how often **Patient Adherence Alerts** are sent to CPS.
- 3) Use the **Weekly Key-Value Pair Measures** drop-down to select the appropriate setting. Available settings include:
 - **Enabled:** **Key-Value Pair Measures** will be sent to CPS on a weekly basis for all measured patients.
 - **Disabled:** **Key-Value Pair Measures** will not be generated.
- 4) Use the **PDC Selection** drop-down to select if **Patient Adherence Alerts** and/or **Key-Value Pair Measures** contain **6 month PDC** or **12 month PDC** calculations.

- 5) Use the **Facility Selection** drop-down to select if **Patient Adherence Alerts** and/or **Key-Value Pair Measures** are sent to all facilities or select facilities. If **Select Facilities** is selected in the drop-down, you will have the option to enable/disable notifications at an individual facility level.
- 6) Select the **Save** button to save your changes, or the **Cancel** button to discard your changes.

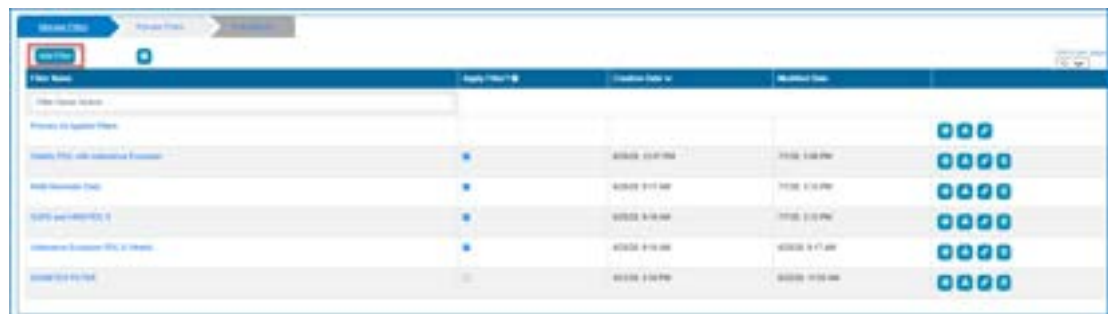
Custom Filters

Custom Filters define a set of criteria regarding patient adherence. If a patient matches the criteria of any **Custom Filter** with the **Apply Filter?** checkbox selected, an APS **Patient Adherence Alert** will be sent to CPS for that patient when **Alerts** are next generated.

Adding Custom Filters

When **Patient Adherence Alerts** are enabled with **Custom Filters**, **Manage Filters** displays immediately below the **CPS Configuration** section.

On the **Manage Filters** tab select the **Add Filter** button.



The **Create CPS Filter** window displays.

Create CPS Filter

Filter Name 1

Starting Template (Select one) 2

- Blank Filter**
Start with a blank filter
- PDC Drug Classes with Adherence Exclusion Filter Template**
Starting Criteria in Filter:
 - Drug Classes: Diabetes, Hypertension, Cholesterol, COPD
 - PDC 12 Mo between .5 and .8
 - Plan filters
 - Coverage ended 5 to 100 days ago
 - Yearly adherence for patient has not yet been determined
 - Patient has not been reviewed in the last two weeks
- SUPD and HRM Filter Template**
Starting Criteria in Filter:
 - Drug Classes: SUPD, HRM
 - PDC 12 Mo is 0
 - Plan filters
- Refill Reminder Filter Template**
Starting Criteria in Filter:
 - Drug Classes: Diabetes, Hypertension, Cholesterol, COPD
 - Coverage ended 5 to 100 days ago

Save 3 Cancel

- 1) Enter a **Filter Name**.
- 2) Select a **Starting Template**.
- 3) Select the **Save** button to save the **Custom Filter**, or the **Cancel** button to discard the **Custom Filter**.

Note: When **Blank Filter** is selected as the **Starting Template**, you will also need to select the **Drug Types** in order to save the **Custom Filter**.

The **Filter Criteria** window displays so that you can define the criteria for the **Custom Filter**.

Filter Criteria for Custom Filters

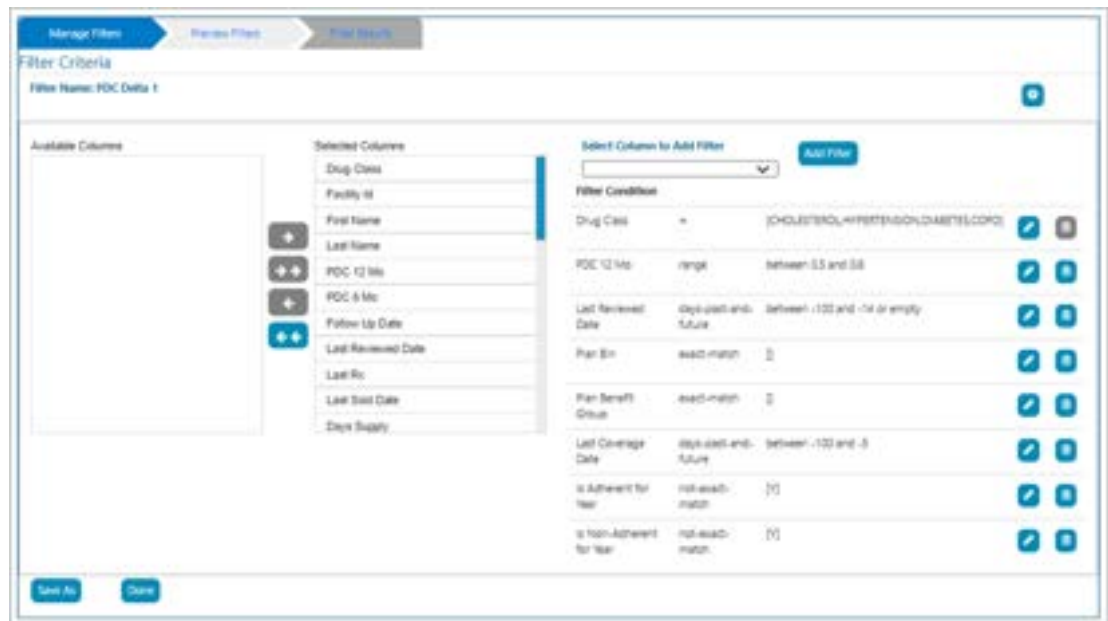
The **Filter Criteria** window is divided into 2 areas:

- 1) ["Available/Selected Columns" on page 192](#)
- 2) ["Add, Edit and Delete Filter Conditions" on page 193](#)

Available/Selected Columns

By default, all columns will be included when viewing the results of the **Custom Filter**. There are 2 ways to reduce the number of columns that will be displayed in the results:

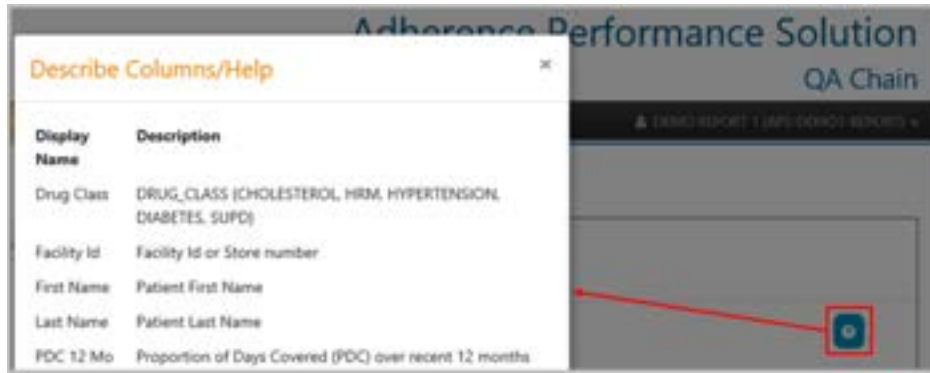
- 1) Use the double left arrow (⇐) to move all columns from the **Selected Columns** section to the **Available Columns** section. Desired columns can then be moved back to the **Selected Columns** section by highlighting the desired column and selecting the right arrow (⇒). Use of the **Ctrl** key allows for selection of multiple columns.
- 2) Remove only those columns that are not desired from the **Selected Columns** section individually, or in groups by using the **Ctrl** key, and selecting the left arrow (⇐) to move them to the **Available Columns** section.



The order of the columns can be changed by dragging and dropping a column in the desired position.

Note: The **Drug Class** column is a mandatory column and cannot be removed from the **Selected Columns** list.

For a description of each column, select the **Describe Columns/Help** button.



Add, Edit and Delete Filter Conditions

Filter Conditions can be created by selecting the column to filter from the **Select Column to Add Filter** drop-down and selecting the **Add Filter** button. The **Add Filter** pop-up will display.



If the **Add Filter** button is selected prior to selecting a column, a pop-up box will be displayed instructing you to select a column to filter.



Note: The **Drug Class Filter Condition** is mandatory and cannot be deleted. Therefore, the **Delete** button (🗑️) is disabled. You can, however, edit the **Drug Class Filter Condition** if desired.

There are 4 types of Filter Data Types:

- 1) [Number Data Type](#)
- 2) [String Data Type](#)
- 3) [Date Data Type](#)

4) Drug Class Data Type

Multiple **Filter Conditions** can be added to a **Custom Filter** to create more defined criteria. You can mix and match the various types of **Filter Conditions** in order to achieve the desired results. When multiple **Filter Conditions** are added to a **Custom Filter**, they act in an “and” fashion, where the report will filter on the 1st **Filter Condition** AND the 2nd **Filter Condition** AND the 3rd **Filter Condition**, etc.

Number Data Type

When a column is selected that is based on a number, you can select to filter based on a specific value or on a range. When using the **Value** option, you can select **equal to (=)**, **greater-than-or-equal (>=)** or **less-than-or-equal (<=)**. If **Range** is used, the starting (left) number must be less than or equal to the ending (right) number, or an error will be displayed.



Once the criteria have been added, select the **Save** button to add the **Filter Condition**.

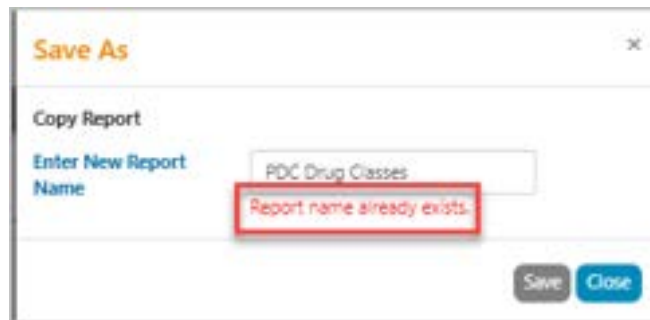


You have the option to edit any existing **Filter Conditions**, or, with the exception of the **Drug Class Filter Condition**, delete existing **Filter Conditions**. When adding or changing **Filter Conditions**, your work is saved incrementally as each action is completed. When you are satisfied with the

Filter Conditions, select the **Done** button. You will be returned to the previous window.

Selecting the **Save As** button will open a pop-up box, allowing you to enter a new **Custom Filter** name. Select the **Save** button once a new name is entered.

Note: The **Custom Filter** name entered cannot match an existing **Custom Filter** name.

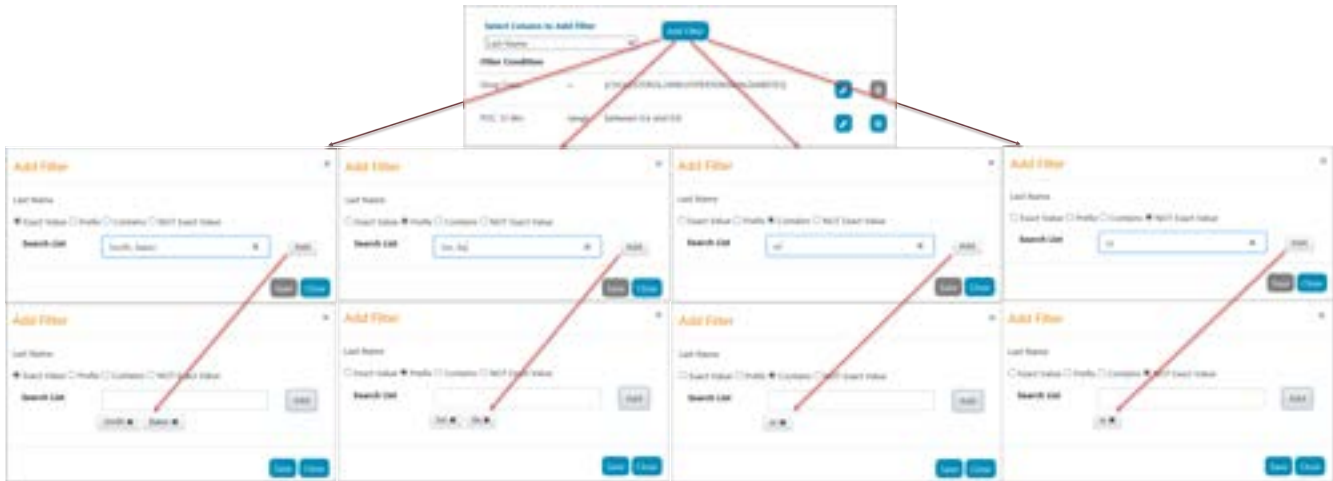


String Data Type

When a column is selected that is based on a character string, you can select to filter based on:

- **Exact Value:** The **Exact Value** option will return results that match the **Search List** string exactly.
- **Prefix:** The **Prefix** option will return results where the start of the column field matches the **Search List** string.
- **Contains:** The **Contains** option will return results where a character string anywhere in the column field matches the **Search List** string
- **NOT Exact Value:** The **NOT Exact Value** option will exclude results that match the **Search List** string exactly.

For all these operators, a list can be created by entering multiple values, separated by a comma and then selecting the **Add** button. Values can also be added one-by-one by selecting the **Add** button after each entry. The **Search List** values will be added to the list and appear below the **Search List** entry box.



Once the list has been created, select the **Save** button to add the **Filter Condition**.



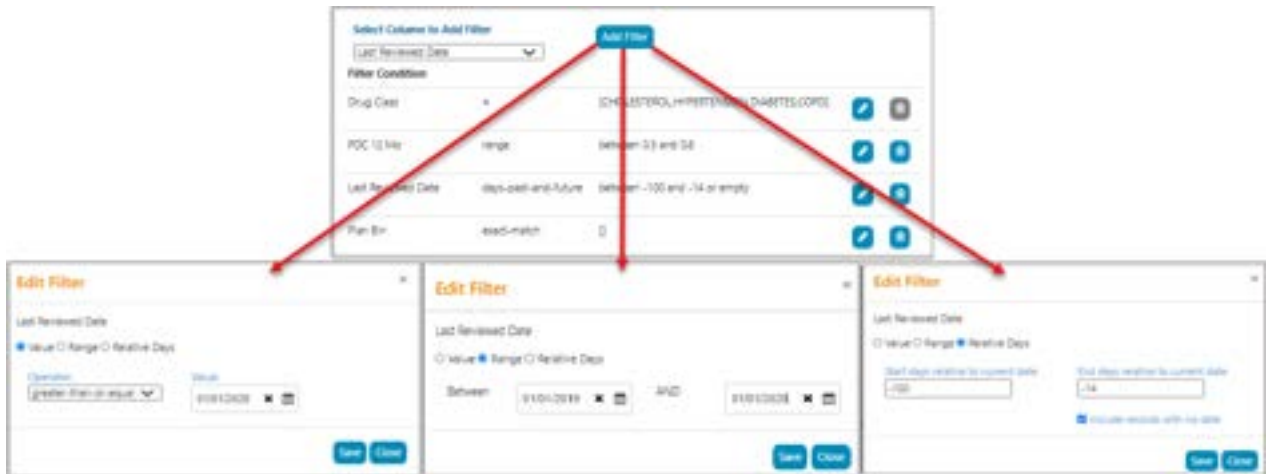
The **Save As** and **Done** buttons will require you to enter a new **Custom Filter** name and save, or return you to the previous window, respectively, as described in [Number Data Type](#) above.

Date Data Type

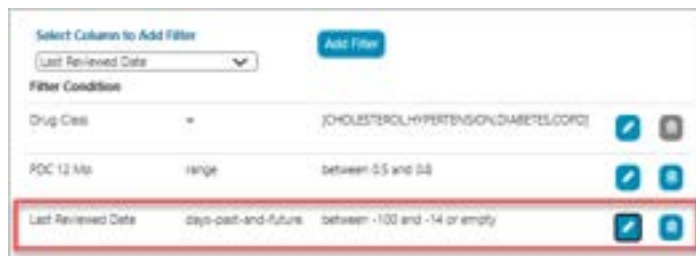
When a column is selected that is based on a date, you can select to filter based on:

- **Value:** When using the **Value** option, you can select **equal to** (=), **greater-than-or-equal** (>=) or **less-than-or-equal** (<=) a specified date.
- **Range:** Using a **Range** allows you to specify a beginning and ending date for the **Filter Condition**.
- **Relative Days:** **Relative Days** are used to specify the number of days in the past (negative numbers) or in the future (positive numbers), if applicable, relative to the current date. You can also include records with no date if desired.

Note: If either **Range** or **Relative Days** is used, the starting (left) date or number must be less than or equal to the ending (right) date or number, or an error will be displayed.



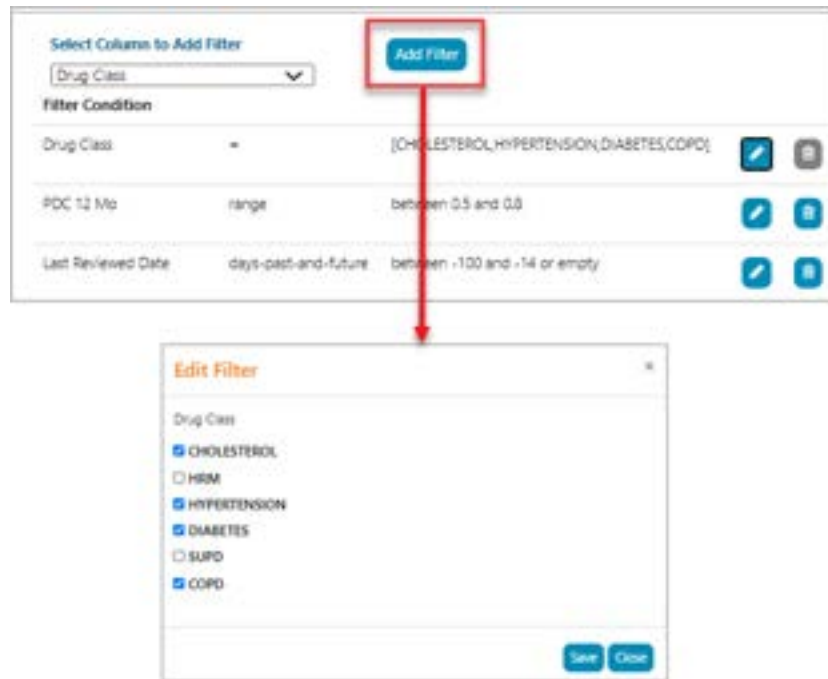
Once the criteria have been added, select the **Save** button to add the **Filter Condition**.



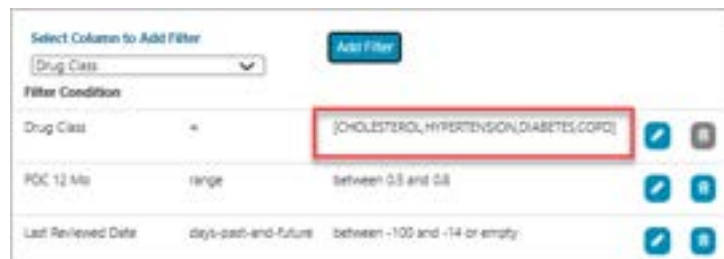
The **Save As** and **Done** buttons will require you to enter a new **Custom Filter** name and save, or return you to the previous window, respectively, as described in [Number Data Type](#) above.

Drug Class Data Type

The **Drug Class Data Type** allows you to filter based on one or more drug classes. At least one drug class must be selected. If no drug class is selected, the **Save** button will be disabled.

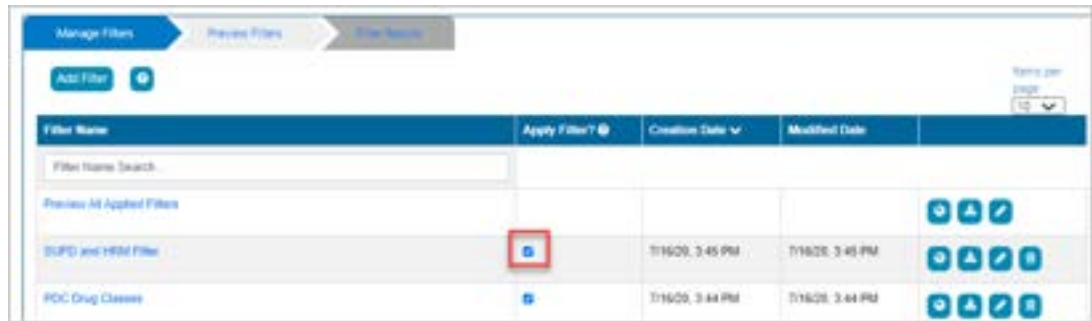


Once you have selected the appropriate drug class(es), select the **Save** button to add the **Filter Condition**.



Applying Custom Filters

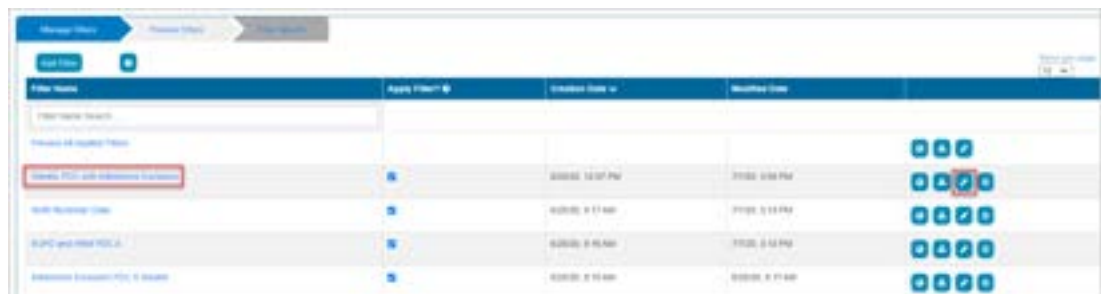
For a **Custom Filter** to be used when determining what **Patient Adherence Alerts** are generated, the **Apply Filter?** checkbox must be selected for the **Custom Filter**.



By default, the **Apply Filter?** checkbox is selected when a **Custom Filter** is added. If you do not want the **Custom Filter** to influence what **Patient Adherence Alerts** are created, unselect the **Apply Filter?** checkbox.

Editing Custom Filters

On the **Manage Filters** tab, you can edit an existing **Custom Filter** by either clicking the **Filter Name** or selecting the **Edit** button.



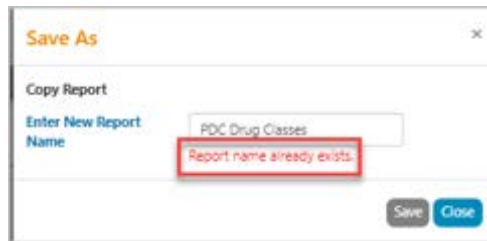
The process to edit **Custom Filters** utilizes the same steps as described in:

- ["Available/Selected Columns" on page 192](#)
- ["Add, Edit and Delete Filter Conditions" on page 193](#)

Saving Updated Custom Filters

As described previously, you have the option to edit any existing **Filter Conditions**, or, with the exception of the **Drug Class Filter Condition**, delete existing **Filter Conditions**. When adding or changing **Filter Conditions**, your work is saved incrementally as each action is completed. When you are satisfied with the **Filter Conditions**, select the **Done** button and you will be returned to the previous window.

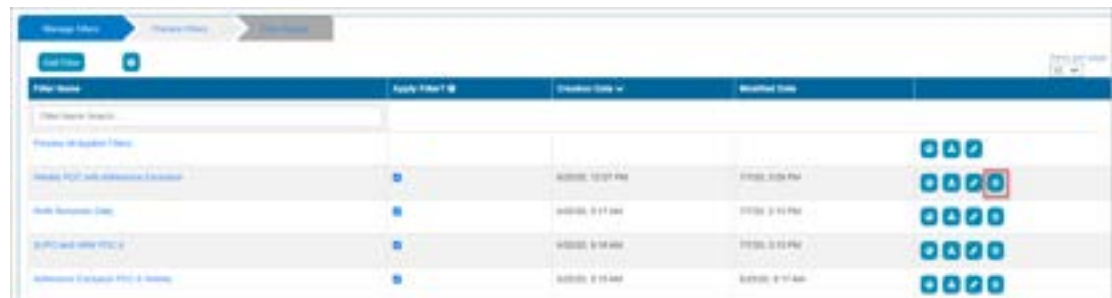
Selecting the **Save As** button will open a pop-up box, allowing you to enter a new **Custom Filter** name. Select the **Save** button once a new name is entered.



Note: The **Custom Filter** name entered cannot match an existing **Custom Filter** name.

Deleting Custom Filters

Custom Filters that are no longer needed can be deleted by selecting the **Delete** button.



Upon selecting the **Delete** button, a confirmation pop-up will display.



Select the **Confirm** button to delete the **Custom Filter**.

Viewing Custom Filter Results

To ensure the accuracy of a **Custom Filter**, it is recommended that you review the list of patients that match the **Filter Conditions** by using either the [Viewing Results Online](#) or [Downloading Results to an Excel Spreadsheet](#) options. You can also review the list of patients that match all applied **Custom Filters** if desired.

Viewing Results Online

Custom Filter results can be viewed online by selecting the **View Online** button on the **Manage Filters** tab.



Once the **View Online** button is selected the system will process the request. This may take several seconds, depending on the **Filter Conditions** that are applied. On the **Preview Filters** tab all the requests are displayed in descending order of **Submitted Date**, meaning the most recently submitted will be displayed at the top. The requests can be sorted by selecting the headers of the column names in ascending or descending order.



To view the results online, select the **online** button. The results will be available for 12 hours from the **Submitted** date/time. At that point, the **Expires** date/time will be reached, and the results will no longer be accessible.



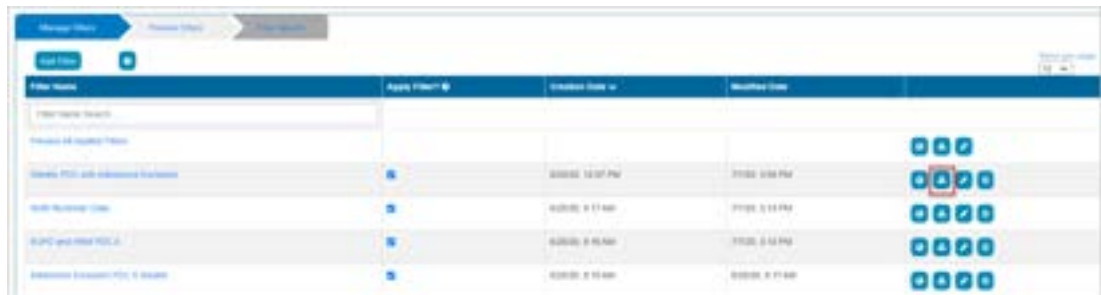
The results will be displayed in table format under **Filter Results**. You can configure the number of rows that will be displayed per page using the **Items per page** drop-down. The **Next >>** and **<< Previous** buttons allow you to navigate pages.

Note: The maximum number of rows that can be displayed online is 500. Additional **Filter Conditions** should be utilized in order to reduce the

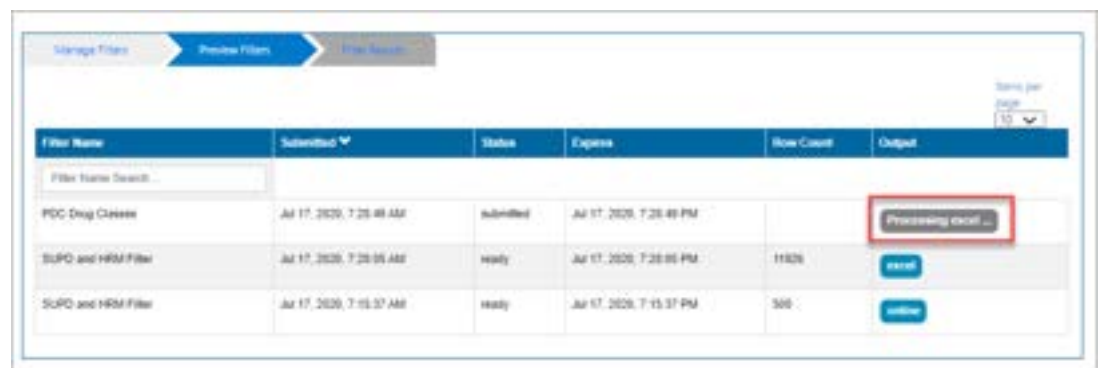
number of rows below 500. To view more than 500 rows, the report must be downloaded to Excel®, as described in [Downloading Results to an Excel Spreadsheet](#) below.

Downloading Results to an Excel Spreadsheet

Custom Filter results can also be exported to an Excel® spreadsheet by selecting the **Download Excel** button.



Once the **Download Excel** button is selected the system will process the request. This may take several seconds, depending on the **Filter Conditions** that are applied. On the **Preview Filters** tab all the reports are displayed in descending order of **Submitted Date**, meaning the most recently submitted will be displayed at the top. The reports can be sorted by selecting the headers of the column names in ascending or descending order.



To view the results, select the **excel** button. The results will be available for 12 hours from the **Submitted** date/time. At that point, the **Expires** date/time will be reached, and the results will no longer be accessible.

| Filter Name | Submitted | Status | Expires | Row Count | Output |
|---------------------|--------------------------|--------|--------------------------|-----------|--------|
| PDC Drug Classes | Jul 17, 2020, 7:28:49 AM | ready | Jul 17, 2020, 7:28:49 PM | 2369 | excel |
| SUPD and HRM Filter | Jul 17, 2020, 7:28:05 AM | ready | Jul 17, 2020, 7:28:05 PM | 11928 | excel |
| SUPD and HRM Filter | Jul 17, 2020, 7:15:37 AM | ready | Jul 17, 2020, 7:15:37 PM | 500 | excel |

When the **excel** button is selected, a pop-up box will appear prompting you to select what they want to do with the file. Follow the steps on your computer to download the file.



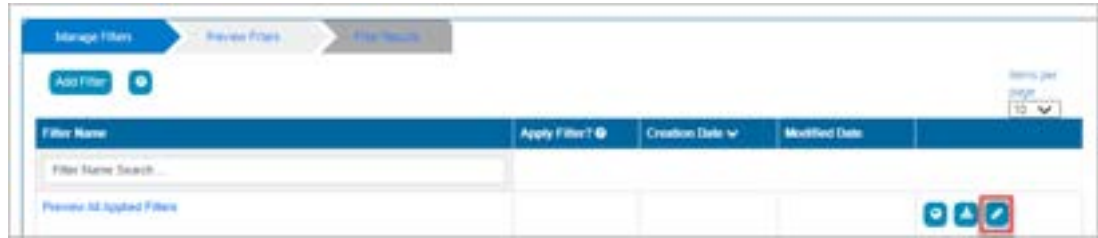
The download produces an Excel® spreadsheet that can be manipulated utilizing built in Excel® functionality.

Preview All Applied Filters

You can review the list of patients that match any **Custom Filter** with the **Apply Filter?** checkbox selected by using the **Preview All Applied Filters** options.

| Filter Name | Apply Filter? | Creation Date | Modified Date |
|-----------------------------|---------------|---------------|---------------|
| Preview All Applied Filters | | | |

You can use the **View Online** and **Download Excel** buttons to view results for all applied **Custom Filters**. For more information, refer to "[Viewing Results Online](#)" on page 201 or "[Downloading Results to an Excel Spreadsheet](#)" on page 202.



If desired, you can also edit the columns that display when viewing the results via the **Edit** button.

Viewing Patient Adherence Alerts in the CPS Clinical App

APS **Patient Adherence Alerts** will display in the CPS **Clinical App** when the patient is in context within the pharmacy management system.



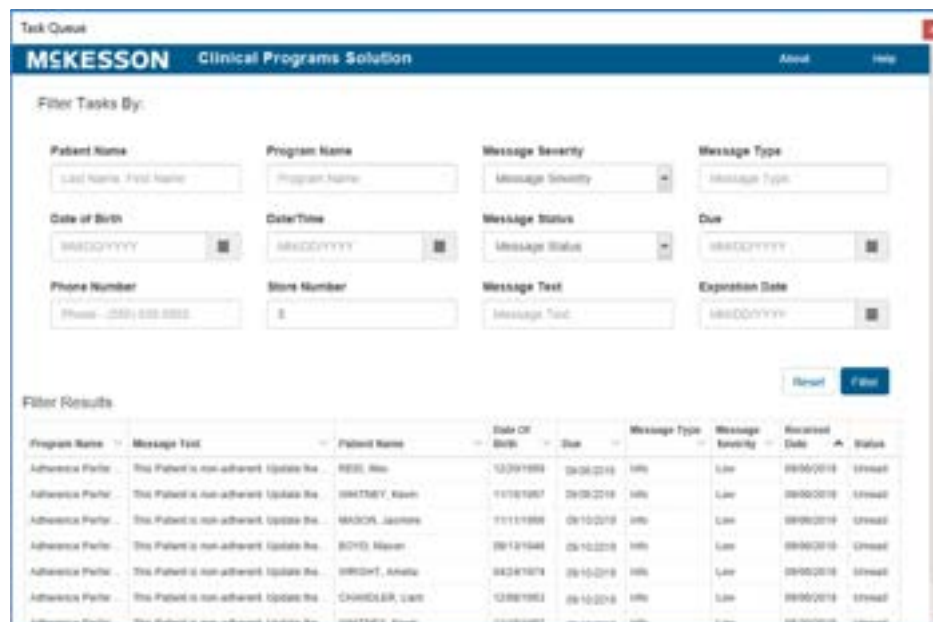
The following information is included in **Patient Adherence Alerts**:

- The patient's 6 or 12-month adherence score for each disease state. Disease states will only display within the message if the patient has a non-adherent score. These scores translate to percentages (so, for example, 0.76 is the same as 76%).

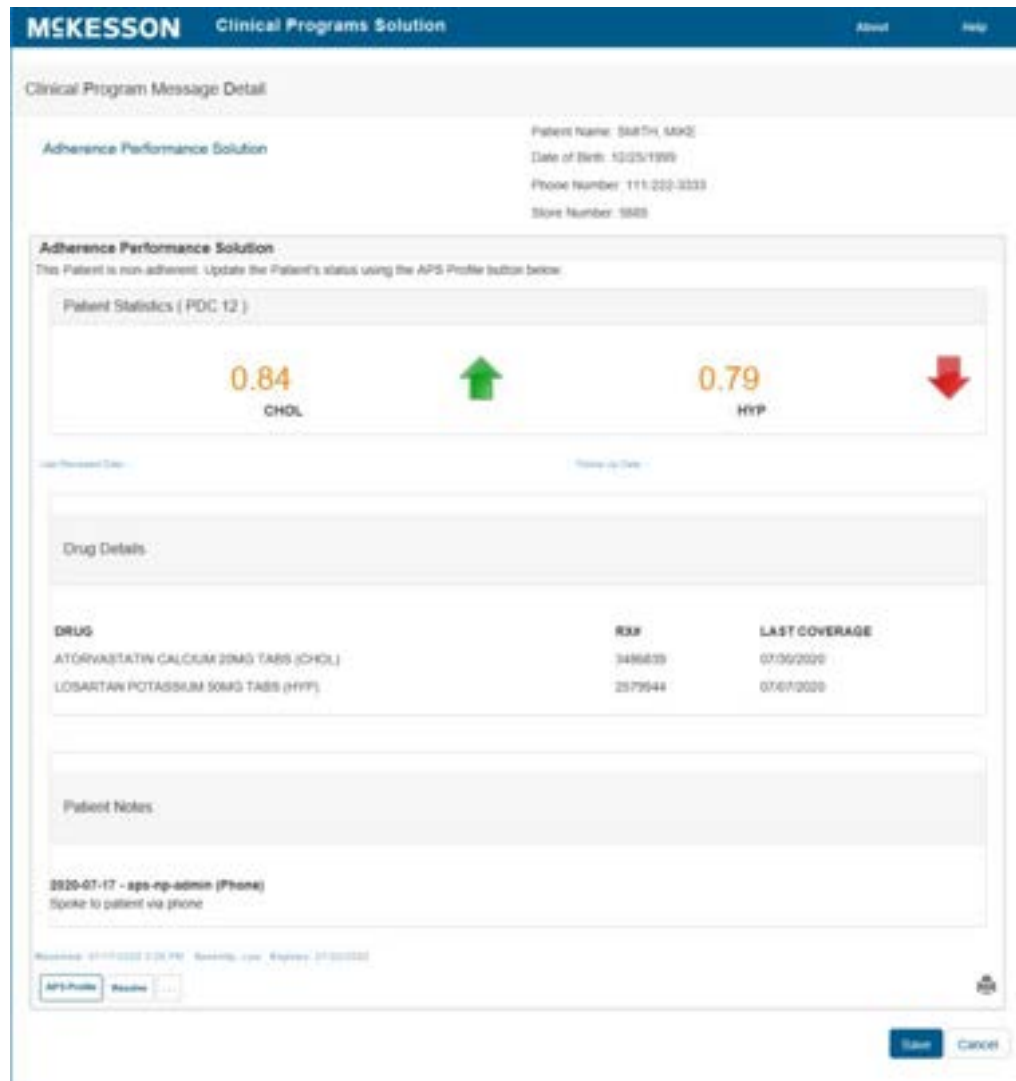
- A visual indicator to show how the patient is trending from their last measured PDC score. If an up arrow displays next to a disease state, then the patient’s PDC score has improved since the previous month. Likewise, if a down arrow displays, then the patient’s PDC score has declined since the previous month. If a flat line displays, then the patient’s PDC score is the same as it was in the previous month.
- The APS Follow Up Date so that pharmacy staff knows when to check back in with the patient.
- The APS Last Reviewed Date so pharmacy staff knows when the patient was last contacted for their adherence.
- Drug details for the patient to assist with researching patient adherence.
- Patient Notes that exist in APS for the patient.
- Access to the APS Patient Profile via the **APS Profile** button. For more information on accessing the APS Patient Profile, refer to ["Opening the APS Patient Profile via Patient Adherence Alerts"](#) on page 207.

Viewing Patient Adherence Alerts in the CPS Task Queue

Another option to view APS **Patient Adherence Alerts** is to use the CPS **Task Queue**. The CPS **Task Queue** will provide insight into all **Patient Adherence Alerts** across all of your patients.



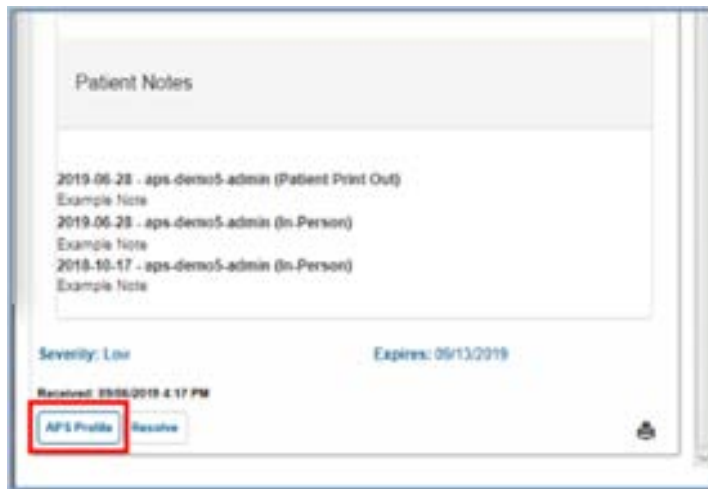
To view additional information for a particular **Patient Adherence Alert**, select the row within the CPS **Task Queue** to open the **Clinical Program Message Detail** window. The message content displayed within the **Clinical Program Message Detail** window is the same content that displays when viewed using the CPS **Clinical App**.



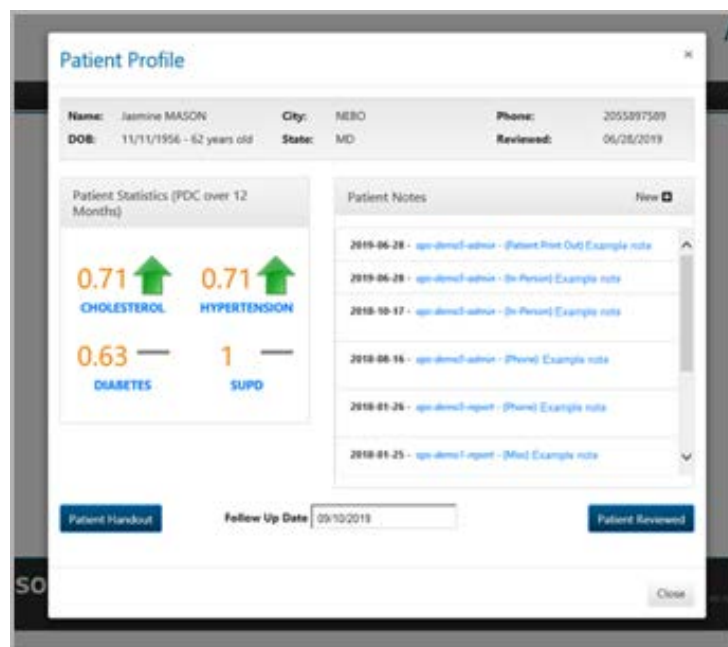
Opening the APS Patient Profile via Patient Adherence Alerts

The APS Patient Profile provides additional adherence information on a patient. For this reason, you can easily open the APS Patient Profile directly from an APS **Patient Adherence Alert** in CPS.

To launch the APS Patient Profile, first open the APS **Patient Adherence Alert** using either the CPS Clinical App or **Task Queue**. Next, select the **APS Profile** button.

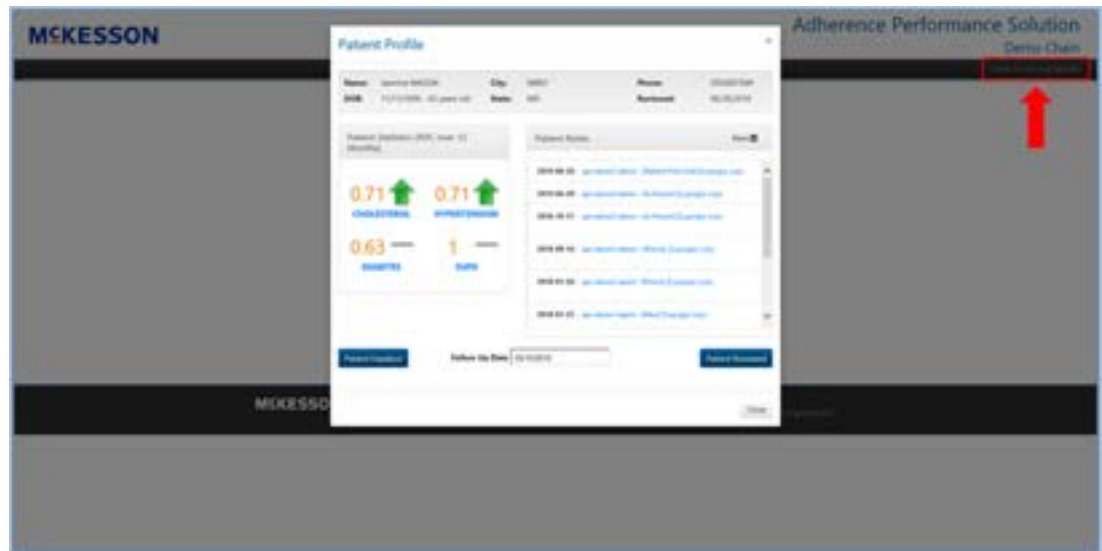


Selecting the **APS Profile** button will initiate the single sign on process between CPS and APS. Once the single sign on process is successful, the patient in context’s profile in APS will open in the default browser without you having to enter any additional credentials.



Note: If a system error is encountered during the single sign on process, the APS login page will open in the default browser.

After launching APS via a **Patient Adherence Alert**, you will only have access to the patient in context’s profile in APS. To navigate to other APS windows, select the **LOGIN TO APS DASHBOARD** link to open the APS login page.

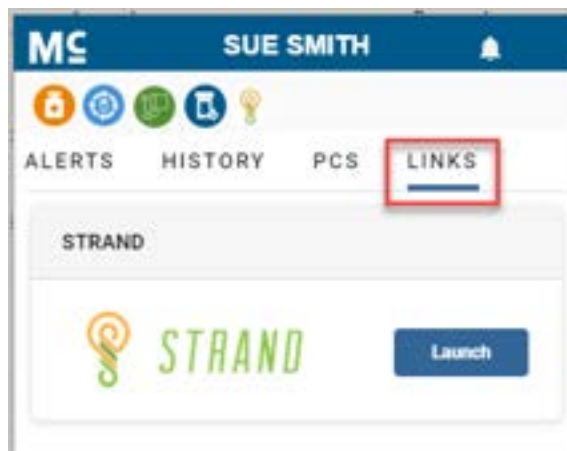


Note: You will need to close the APS Patient Profile in order to select the **LOGIN TO APS DASHBOARD** link.

16. CPS and STRAND Integration

STRAND Single Sign On

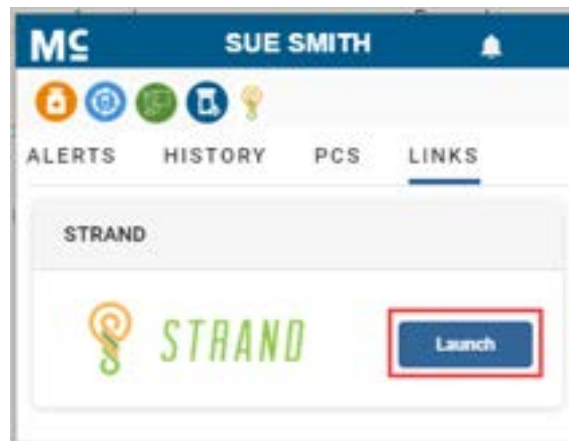
The integration between CPS and STRAND allows pharmacy staff members to identify high risk patients eligible for additional clinical services to be documented in a Pharmacy eCare Plan. STRAND facilitates clinical interventions and patient engagement by coordinating enrollment, documentation and education for coaching Programs, and tracking clinical results. Single sign on functionality is available with the CPS and STRAND integration and can be initiated in one of two ways, either a CPS Alert or using the **Links** tab in the **Clinical App**. With this functionality, after the first successful log in, when you launch STRAND via a CPS Alert or the **Clinical App Links** tab, the patient in context's profile in STRAND will open in the default browser with you already logged in to STRAND.



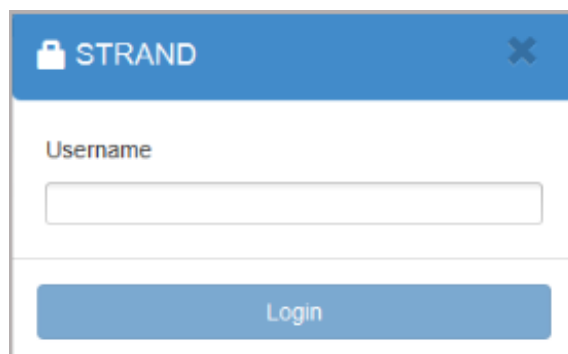
When a STRAND Alert is available in CPS, you can select the STRAND **Document** button to open STRAND in the default browser and initiate the single sign on process.



When the patient in context is enrolled in STRAND, the **Links** tab will display within the **Clinical App**. Within the **Links** tab, you can select the **Launch** button to open STRAND in the default browser and initiate the single sign on process.



After selecting the STRAND **Document** or **Launch** button, if you have not yet entered your STRAND username in the logged in facility, you will be prompted to do so.



Note: You will only be prompted to enter your STRAND username the very first time you select the STRAND **Document** or **Launch** button in a facility. At any point, however, if a STRAND username error is encountered during the single sign on process, you will be prompted to enter your STRAND username a maximum of two times per pharmacy management session. Once the maximum number of STRAND username prompts is met, if the STRAND username error continues, an error will display within CPS and the STRAND login page will open in the default browser with you not automatically logged in to STRAND.

When you successfully input your STRAND username and the single sign on process is successful, the patient in context's profile in STRAND will open in the default browser with you already logged in to STRAND.

Note: If a system error is encountered during the single sign on process, the STRAND login page will open in the default browser with you not automatically logged in to STRAND.



Important: Pharmserv version 8.1.1.0 or higher is required for STRAND single sign on functionality.

17. Appendix

Questionnaire Components

| Type | Component | Description |
|-------|------------|---|
| Basic | Text Field | <p>The text field is a basic input field that enables the user to type a small amount of text. The following is a description of the options on each tab:</p> <p>Display Tab:</p> <p>Label—The label that will appear above the Text Field on the questionnaire.</p> <p>Placeholder—Placeholder text is temporary text that will appear in the Text Field before there is user interaction.</p> <p>Description—Description text that will appear below the Text Field on the questionnaire.</p> <p>Tooltip—A tooltip that will appear on the right side of the Label on the questionnaire.</p> <p>Hide Label—A check box to hide the label of this component. This allows you to hide the label in the form builder, but not when it's rendered.</p> <p>Disabled—A check box to allow the Text Field to be disabled.</p> <p>Data Tab:</p> <p>Default Value—A preset value for the Text field defined by the program administrator, which displays to the user before interaction. Having a default value will override the placeholder text.</p> <p>Key—The Key value is used to identify this field when reporting on questionnaire values. The Key must be unique within the Program, you cannot use the same Key for other components. If no Key is entered into the field a Key will be generated.</p> <p>Save to Patient Profile—A check box to allow the Text Field value to be saved to the patient profile.</p> <p>Validation Tab:</p> <p>Required—A check box to require the Text Field to be filled in before the questionnaire is submitted.</p> <p>Minimum Length—The minimum length of characters that the Text Field must meet.</p> <p>Maximum Length—The maximum length of characters that the Text Field must meet.</p> |

| Type | Component | Description |
|------|-------------------------|--|
| | | <p>Conditional Tab:</p> <p>This component should Display:—Choose True or False to display this component within the questionnaire based on the field values below.</p> <p>When the form component:—Select an existing form component of your questionnaire that will be used as a reference for the condition.</p> <p>Has the value:—Define the value captured in the questionnaire for the form component selected above to complete the conditional statement.</p> |
| | <p>Text Area</p> | <p>The text area is a larger input box that allows the user to enter multiple lines of text. The following is a description of the options on each tab:</p> <p>Display Tab:</p> <p>Label—The label that will appear above the Text Area on the questionnaire.</p> <p>Placeholder—Placeholder text is temporary text that will appear in the Text Area before there is user interaction.</p> <p>Description—Description text that will appear below the Text Area on the questionnaire.</p> <p>Rows—Provides the ability to add rows to the Text Area.</p> <p>Tooltip—A tooltip that will appear on the right side of the Label on the questionnaire.</p> <p>Hide Label—A check box to hide the label of this component. This allows you to hide the label in the form builder, but not when it's rendered.</p> <p>Disabled—A check box to allow the Text Area to be disabled.</p> <p>Data Tab:</p> <p>Default Value—A preset value for the Text Area defined by the program administrator, which displays to the user before interaction. Having a default value will override the placeholder text.</p> <p>Key—The Key value is used to identify this field when reporting on questionnaire values. The Key must be unique within the Program, you cannot use the same Key for other components. If no Key is entered into the field a Key will be generated.</p> <p>Save to Patient Profile—A check box to allow the Text Area value to be saved to the patient profile.</p> <p>Validation Tab:</p> <p>Required—A check box to require the Text Area to be filled in before the questionnaire is submitted.</p> <p>Minimum Length—The minimum length of characters that the Text Area must meet.</p> <p>Maximum Length—The maximum length of characters that the Text Area must meet.</p> |

| Type | Component | Description |
|------|----------------------|--|
| | | <p>Conditional Tab:</p> <p>This component should Display:—Choose True or False to display this component within the questionnaire based on the field values below.</p> <p>When the form component:—Select an existing form component of your questionnaire that will be used as a reference for the condition.</p> <p>Has the value:—Define the value captured in the questionnaire for the form component selected above to complete the conditional statement.</p> |
| | <p>Number</p> | <p>This input field allows a user to enter only a number as defined by the configuration of the field set up by an Admin. The following is a description of the options on each tab:</p> <p>Display Tab:</p> <p>Label—The label that will appear above the Number component on the questionnaire.</p> <p>Placeholder—Placeholder text is temporary text that will appear in the Number component before there is user interaction.</p> <p>Description—Description text that will appear below the Number component on the questionnaire.</p> <p>Tooltip—A tooltip that will appear on the right side of the Label on the questionnaire.</p> <p>Hide Label—A check box to hide the label of this component. This allows you to hide the label in the form builder, but not when it's rendered.</p> <p>Disabled—A check box to allow the Number component to be disabled.</p> <p>Data Tab:</p> <p>Default Value—A preset value for the component defined by the program administrator, which displays to the user before interaction. Having a default value will override the placeholder text.</p> <p>Use Thousands Separator—Check box to separate thousands by local delimiter.</p> <p>Decimal Places—The maximum number or decimal places.</p> <p>Key—The Key value is used to identify this field when reporting on questionnaire values. The Key must be unique within the Program, you cannot use the same Key for other components. If no Key is entered into the field a Key will be generated.</p> <p>Save to Patient Profile—A check box to allow the Number component value to be saved to the patient profile.</p> |

| Type | Component | Description |
|------|------------------------|---|
| | | <p>Validation Tab:</p> <p>Required—A check box to require the Number component to be filled in before the questionnaire is submitted.</p> <p>Minimum Length—The minimum value that the component must meet.</p> <p>Maximum Length—The maximum value that the component must meet.</p> <p>Conditional Tab:</p> <p>This component should Display:—Choose True or False to display this component within the questionnaire based on the field values below.</p> <p>When the form component:—Select an existing form component of your questionnaire that will be used as a reference for the condition.</p> <p>Has the value:—Define the value captured in the questionnaire for the form component selected above to complete the conditional statement.</p> |
| | <p>Currency</p> | <p>This input field allows a user to enter only a number that will show in currency format. The following is a description of the options on each tab:</p> <p>Display Tab:</p> <p>Label—The label that will appear above the Currency component on the questionnaire.</p> <p>Placeholder—Placeholder text is temporary text that will appear in the Number component before there is user interaction.</p> <p>Description—Description text that will appear below the Currency component on the questionnaire.</p> <p>Tooltip—A tooltip that will appear on the right side of the Label on the questionnaire.</p> <p>Hide Label—A check box to hide the label of this component. This allows you to hide the label in the form builder, but not when it's rendered.</p> <p>Disabled—A check box to allow the Currency component to be disabled.</p> <p>Data Tab:</p> <p>Default Value—A preset value for the component defined by the program administrator, which displays to the user before interaction. Having a default value will override the placeholder text.</p> <p>Key—The Key value is used to identify this field when reporting on questionnaire values. The Key must be unique within the Program, you cannot use the same Key for other components. If no Key is entered into the field a Key will be generated.</p> <p>Save to Patient Profile—A check box to allow the Currency component value to be saved to the patient profile.</p> |

| Type | Component | Description |
|------|----------------------------|---|
| | | <p>Validation Tab:</p> <p>Required—A check box to require the Currency component to be filled in before the questionnaire is submitted.</p> <p>Conditional Tab:</p> <p>This component should Display:—Choose True or False to display this component within the questionnaire based on the field values below.</p> <p>When the form component:—Select an existing form component of your questionnaire that will be used as a reference for the condition.</p> <p>Has the value:—Define the value captured in the questionnaire for the form component selected above to complete the conditional statement.</p> |
| | <p>Phone Number</p> | <p>This input field only allows seven numbers and will display in standard phone number format. The following is a description of the options on each tab:</p> <p>Display Tab:</p> <p>Label—The label that will appear above the Phone Number on the questionnaire.</p> <p>Placeholder—Placeholder text is temporary text that will appear in the Phone Number before there is user interaction.</p> <p>Description—Description text that will appear below the Phone Number on the questionnaire.</p> <p>Tooltip—A tooltip that will appear on the right side of the Label on the questionnaire.</p> <p>Hide Label—A check box to hide the label of this component. This allows you to hide the label in the form builder, but not when it's rendered.</p> <p>Disabled—A check box to allow the Phone Number to be disabled.</p> <p>Data Tab:</p> <p>Default Value—A preset value for the component defined by the program administrator, which displays to the user before interaction. Having a default value will override the placeholder text.</p> <p>Key—The Key value is used to identify this field when reporting on questionnaire values. The Key must be unique within the Program, you cannot use the same Key for other components. If no Key is entered into the field a Key will be generated.</p> <p>Save to Patient Profile—A check box to allow the Phone Number value to be saved to the patient profile.</p> |

| Type | Component | Description |
|------|--------------------|---|
| | | <p>Validation Tab:</p> <p>Required—A check box to require the Phone Number to be filled in before the questionnaire is submitted.</p> <p>Conditional Tab:</p> <p>This component should Display:—Choose True or False to display this component within the questionnaire based on the field values below.</p> <p>When the form component:—Select an existing form component of your questionnaire that will be used as a reference for the condition.</p> <p>Has the value:—Define the value captured in the questionnaire for the form component selected above to complete the conditional statement.</p> |
| | Content | <p>This is a read only input field and the content of the field is defined by an Admin. The following is a description of the options on each tab:</p> <p>Text Area—Enter content information in the text area. You can customize the text more by using the text formatting options such as; font size and color, bold, underline and more.</p> <p>Display Tab:</p> <p>Label—The label that will appear above the Content component on the questionnaire.</p> <p>Conditional Tab:</p> <p>This component should Display:—Choose True or False to display this component within the questionnaire based on the field values below.</p> <p>When the form component:—Select an existing form component of your questionnaire that will be used as a reference for the condition.</p> <p>Has the value:—Define the value captured in the questionnaire for the form component selected above to complete the conditional statement.</p> |
| | Date / Time | <p>This input field allows a user to select a date and time value. The following is a description of the options on each tab:</p> <p>Display Tab:</p> <p>Label—The label that will appear above the Date / Time component on the questionnaire.</p> <p>Placeholder—Placeholder text is temporary text that will appear in the Number component before there is user interaction.</p> <p>Description—Description text that will appear below the Date / Time component on the questionnaire.</p> <p>Tooltip—A tooltip that will appear on the right side of the Label on the questionnaire.</p> |

| Type | Component | Description |
|------|-----------|--|
| | | <p>Hide Label—A check box to hide the label of this component. This allows you to hide the label in the form builder, but not when it's rendered.</p> <p>Disabled—A check box to allow the Date / Time component to be disabled.</p> <p>Date Tab:</p> <p>Enable Date Input—Enables a pop-up calendar in order to select a date and time.</p> <p>Minimum Date—The minimum date that can be picked.</p> <p>Maximum Date—The maximum date that can be picked.</p> <p>Disable specific dates or dates by range—Allows you to enter dates you want to blacklist.</p> <p>Disable weekends—A check box to disable weekends.</p> <p>Disable weekdays—A checkbox to disable weekdays.</p> <p>Time Tab:</p> <p>Enable Time Input—Enables time input for this field.</p> <p>Hour Step Size—The number of hours to increment/decrement in the time picker.</p> <p>Minute Step Size—The number of minutes to increment/decrement in the time picker.</p> <p>12 Hour Time (AM/PM)—Display the time in 12-hour time with AM/PM.</p> <p>Data Tab:</p> <p>Default Value—A preset value for the component defined by the program administrator, which displays to the user before interaction. Having a default value will override the placeholder text.</p> <p>Default Date—You can use Moment.js functions to set the default value to a specific date, for example <code>moment().subtract(10 'days')</code>.</p> <p>Key—The Key value is used to identify this field when reporting on questionnaire values. The Key must be unique within the Program, you cannot use the same Key for other components. If no Key is entered into the field a Key will be generated.</p> <p>Save to Patient Profile—A check box to allow the Day / Time value to be saved to the patient profile.</p> |

| Type | Component | Description |
|------|-------------------|---|
| | | <p>Validation Tab:</p> <p>Required—A check box to require the Date / Time component to be filled in before the questionnaire is submitted.</p> <p>Conditional Tab:</p> <p>This component should Display:—Choose True or False to display this component within the questionnaire based on the field values below.</p> <p>When the form component:—Select an existing form component of your questionnaire that will be used as a reference for the condition.</p> <p>Has the value:—Define the value captured in the questionnaire for the form component selected above to complete the conditional statement.</p> |
| | <p>Day</p> | <p>This input field allows a user to select a month, day and year. The following is a description of the options on each tab:</p> <p>Display Tab:</p> <p>Label—The label that will appear above the Day fields on the questionnaire.</p> <p>Description—Description text that will appear below the Day fields on the questionnaire.</p> <p>Tooltip—A tooltip that will appear on the right side of the Day fields on the questionnaire.</p> <p>Hide Label—A check box to hide the label of this component. This allows you to hide the label in the form builder, but not when it's rendered.</p> <p>Disabled—A check box to allow the Day fields to be disabled.</p> <p>Day Tab:</p> <p>Select—Puts a drop-down selection of options for the day.</p> <p>Placeholder—Placeholder text is temporary text that will appear before there is user interaction.</p> <p>Hidden—A check-box to hide the day part of the component.</p> <p>Day First—A check-box to display the Day field before the Month field.</p> <p>Month Tab:</p> <p>Select—Puts a drop-down selection of options for the month.</p> <p>Placeholder—Placeholder text is temporary text that will appear before there is user interaction.</p> <p>Hidden—A check-box to hide the month part of the component.</p> |

| Type | Component | Description |
|------|-----------|---|
| | | <p>Year Tab:</p> <p>Select—Puts a drop-down selection of options for the year.</p> <p>Minimum Year—The minimum year that can be entered.</p> <p>Maximum Year—The maximum year that can be entered.</p> <p>Placeholder—Placeholder text is temporary text that will appear before there is user interaction.</p> <p>Hidden—A check-box to hide the year part of the component.</p> <p>Data Tab:</p> <p>Default Value—A preset value for the component defined by the program administrator, which displays to the user before interaction. Having a default value will override the placeholder text.</p> <p>Key—The Key value is used to identify this field when reporting on questionnaire values. The Key must be unique within the Program, you cannot use the same Key for other components. If no Key is entered into the field a Key will be generated.</p> <p>Save to Patient Profile—A check box to allow the Day values to be saved to the patient profile.</p> <p>Validation Tab:</p> <p>Require Day—A check box to require the Day to be filled in before the questionnaire is submitted.</p> <p>Require Month—A check box to require the Month to be filled in before the questionnaire is submitted.</p> <p>Require Year—A check box to require the Year to be filled in before the questionnaire is submitted.</p> <p>Maximum Day—The maximum day that can be entered.</p> <p>Minimum Day—The minimum day that can be entered.</p> <p>Conditional Tab:</p> <p>This component should Display:—Choose True or False to display this component within the questionnaire based on the field values below.</p> <p>When the form component:—Select an existing form component of your questionnaire that will be used as a reference for the condition.</p> <p>Has the value:—Define the value captured in the questionnaire for the form component selected above to complete the conditional statement.</p> |

| Type | Component | Description |
|------|--------------------|--|
| | <p>Time</p> | <p>This input field allows a user to select a specific time. The following is a description of the options on each tab:</p> <p>Display Tab:</p> <p>Label—The label that will appear above the Time component on the questionnaire.</p> <p>Description—Description text that will appear below the Time component on the questionnaire.</p> <p>Tooltip—A tooltip that will appear on the right side of the Label on the questionnaire.</p> <p>Hide Label—A check box to hide the label of this component. This allows you to hide the label in the form builder, but not when it’s rendered.</p> <p>Disabled—A check box to allow the Time component to be disabled.</p> <p>Data Tab:</p> <p>Default Value—A preset value for the component defined by the program administrator, which displays to the user before interaction. Having a default value will override the placeholder text.</p> <p>Data Format—The format of Time, for example HH:mm:ss.</p> <p>Key—The Key value is used to identify this field when reporting on questionnaire values. The Key must be unique within the Program, you cannot use the same Key for other components. If no Key is entered into the field a Key will be generated.</p> <p>Save to Patient Profile—A check box to allow the Time value to be saved to the patient profile.</p> <p>Validation Tab:</p> <p>Required—A check box to require the Time to be filled in before the questionnaire is submitted.</p> <p>Conditional Tab:</p> <p>This component should Display:—Choose True or False to display this component within the questionnaire based on the field values below.</p> <p>When the form component:—Select an existing form component of your questionnaire that will be used as a reference for the condition.</p> <p>Has the value:—Define the value captured in the questionnaire for the form component selected above to complete the conditional statement.</p> |

| Type | Component | Description |
|------|------------------------|--|
| | <p>Checkbox</p> | <p>This is a single checkbox field allowing the user to select either True or False for the value. The following is a description of the options on each tab:</p> <p>Display Tab:</p> <p>Label—The label that will appear above the Checkbox component on the questionnaire.</p> <p>Description—Description text that will appear below the Checkbox component on the questionnaire.</p> <p>Tooltip—A tooltip that will appear on the right side of the Checkbox on the questionnaire.</p> <p>Hide Label—A check box to hide the label of this component. This allows you to hide the label in the form builder, but not when it’s rendered.</p> <p>Disabled—A check box to allow the Checkbox component to be disabled.</p> <p>Data Tab:</p> <p>Default Value—A preset value for the component defined by the program administrator, which displays to the user before interaction. Having a default value will override the placeholder text.</p> <p>Key—The Key value is used to identify this field when reporting on questionnaire values. The Key must be unique within the Program, you cannot use the same Key for other components. If no Key is entered into the field a Key will be generated.</p> <p>Save to Patient Profile—A check box to allow the Checkbox component value to be saved to the patient profile.</p> <p>Validation Tab:</p> <p>Required—A check box to require the Checkbox component to be filled in before the questionnaire is submitted.</p> <p>Conditional Tab:</p> <p>This component should Display:—Choose True or False to display this component within the questionnaire based on the field values below.</p> <p>When the form component:—Select an existing form component of your questionnaire that will be used as a reference for the condition.</p> <p>Has the value:—Define the value captured in the questionnaire for the form component selected above to complete the conditional statement.</p> |

| Type | Component | Description |
|------|----------------------------|---|
| | <p>Select Boxes</p> | <p>This is a group of check boxes as configured by an Admin and the user is able to select one or more of the values. True or False for the value. The following is a description of the options on each tab:</p> <p>Display Tab:</p> <p>Label—The label that will appear above the Select Boxes component on the questionnaire.</p> <p>Description—Description text that will appear below the Select Boxes component on the questionnaire.</p> <p>Tooltip—A tooltip that will appear on the right side of the Select Boxes on the questionnaire.</p> <p>Inline Layout—A check box to allow the Select Boxes component to be display horizontally.</p> <p>Hide Label—A check box to hide the label of this component. This allows you to hide the label in the form builder, but not when it's rendered.</p> <p>Disabled—A check box to allow the Select Boxes component to be disabled.</p> <p>Data Tab:</p> <p>Default Value—A preset value for the component defined by the program administrator, which displays to the user before interaction. Having a default value will override the placeholder text.</p> <p>Values—The Label and Value for the Select Boxes, the value is the text submitted with the form data. Select the Add Another button to add additional Select Boxes.</p> <p>Key—The Key value is used to identify this field when reporting on questionnaire values. The Key must be unique within the Program, you cannot use the same Key for other components. If no Key is entered into the field a Key will be generated.</p> <p>Save to Patient Profile—A check box to allow the Select Boxes component value to be saved to the patient profile.</p> <p>Validation Tab:</p> <p>Required—A check box to require the Select Boxes component to be filled in before the questionnaire is submitted.</p> <p>Conditional Tab:</p> <p>This component should Display:—Choose True or False to display this component within the questionnaire based on the field values below.</p> <p>When the form component:—Select an existing form component of your questionnaire that will be used as a reference for the condition.</p> <p>Has the value:—Define the value captured in the questionnaire for the form component selected above to complete the conditional statement.</p> |

| Type | Component | Description |
|------|----------------------|--|
| | <p>Select</p> | <p>This is a drop-down field with the values configured by an Admin and the user is able to only select one value. The following is a description of the options on each tab:</p> <p>Display Tab:</p> <p>Label—The label that will appear above the Select component on the questionnaire.</p> <p>Placeholder—Placeholder text is temporary text that will appear in the Select component before there is user interaction.</p> <p>Description—Description text that will appear below the Select component on the questionnaire.</p> <p>Tooltip—A tooltip that will appear on the right side of the Select on the questionnaire.</p> <p>Hide Label—A check box to hide the label of this component. This allows you to hide the label in the form builder, but not when it's rendered.</p> <p>Disabled—A check box to allow the Select component to be disabled.</p> <p>Data Tab:</p> <p>Default Value—A preset value for the component defined by the program administrator, which displays to the user before interaction. Having a default value will override the placeholder text.</p> <p>Data Source Values—The Label and Value for the Select component, the value is the text submitted with the form data. Select the Add Another button to add additional Select components.</p> <p>Key—The Key value is used to identify this field when reporting on questionnaire values. The Key must be unique within the Program, you cannot use the same Key for other components. If no Key is entered into the field a Key will be generated.</p> <p>Save to Patient Profile—A check box to allow the Select component value to be saved to the patient profile.</p> <p>Validation Tab:</p> <p>Required—A check box to require the Select component to be filled in before the questionnaire is submitted.</p> <p>Conditional Tab:</p> <p>This component should Display:—Choose True or False to display this component within the questionnaire based on the field values below.</p> <p>When the form component:—Select an existing form component of your questionnaire that will be used as a reference for the condition.</p> <p>Has the value:—Define the value captured in the questionnaire for the form component selected above to complete the conditional statement.</p> |

| Type | Component | Description |
|------|---------------------|--|
| | <p>Radio</p> | <p>This is a group of radio buttons as configured by an Admin and the user is only able to select one value out of the group. The following is a description of the options on each tab:</p> <p>Display Tab:</p> <p>Label—The label that will appear above the Radio button on the questionnaire.</p> <p>Description—Description text that will appear below the Radio button on the questionnaire.</p> <p>Tooltip—A tooltip that will appear on the right side of the Radio button on the questionnaire.</p> <p>Inline Layout—A check box to allow the Radio button to be display horizontally.</p> <p>Hide Label—A check box to hide the label of this component. This allows you to hide the label in the form builder, but not when it's rendered.</p> <p>Disabled—A check box to allow the Radio button to be disabled.</p> <p>Data Tab:</p> <p>Default Value—A preset value for the component defined by the program administrator, which displays to the user before interaction. Having a default value will override the placeholder text.</p> <p>Values—The Label and Value for the Radio button, the value is the text submitted with the form data. Select the Add Another button to add additional Radio buttons.</p> <p>Key—The Key value is used to identify this field when reporting on questionnaire values. The Key must be unique within the Program, you cannot use the same Key for other components. If no Key is entered into the field a Key will be generated.</p> <p>Save to Patient Profile—A check box to allow the Radio button value to be saved to the patient profile.</p> <p>Validation Tab:</p> <p>Required—A check box to require the Radio button to be filled in before the questionnaire is submitted.</p> <p>Conditional Tab:</p> <p>This component should Display:—Choose True or False to display this component within the questionnaire based on the field values below.</p> <p>When the form component:—Select an existing form component of your questionnaire that will be used as a reference for the condition.</p> <p>Has the value:—Define the value captured in the questionnaire for the form component selected above to complete the conditional statement.</p> |

| Type | Component | Description |
|----------|-------------|---|
| Clinical | Blood Sugar | <p>A group of input fields for Blood Sugar including Fasting Glucose, Postprandial Glucose, A1C. Each value can be configured to independently. The following is a description of the options on each tab:</p> <p>Data Tab:</p> <p>Fasting Glucose mg/dl—A check box to include this blood sugar measurement.</p> <p>Postprandial Glucose mg/dl—A check box to include this blood sugar measurement.</p> <p>A1C mg/dl—A check box to include this blood sugar measurement.</p> <p>Save to Patient Profile—A check box to allow the Blood Sugar value to be saved to the patient profile.</p> <p>Validation Tab:</p> <p>Require Fasting Glucose—A check box to require this blood sugar measurement.</p> <p>Require Postprandial Glucose—A check box to require this blood sugar measurement.</p> <p>Require A1C—A check box to require this blood sugar measurement.</p> <p>Conditional Tab:</p> <p>This component should Display:—Choose True or False to display this component within the questionnaire based on the field values below.</p> <p>When the form component:—Select an existing form component of your questionnaire that will be used as a reference for the condition.</p> <p>Has the value:—Define the value captured in the questionnaire for the form component selected above to complete the conditional statement.</p> |

| Type | Component | Description |
|------|------------------------------|--|
| | <p>Blood Pressure</p> | <p>A group of input fields for Blood Pressure including Systolic, Diastolic and Pulse. Each value can be configured to independently. The following is a description of the options on each tab:</p> <p>Data Tab:</p> <p>Systolic—A check box to include this blood pressure measurement.</p> <p>Diastolic—A check box to include this blood pressure measurement.</p> <p>Pulse—A check box to include this blood pressure measurement.</p> <p>Save to Patient Profile—A check box to allow the Radio component value to be saved to the patient profile.</p> <p>Validation Tab:</p> <p>Require Systolic—A check box to require this blood pressure measurement.</p> <p>Require Diastolic—A check box to require this blood pressure measurement.</p> <p>Require Pulse Rate—A check box to require this blood pressure measurement.</p> <p>Conditional Tab:</p> <p>This component should Display:—Choose True or False to display this component within the questionnaire based on the field values below.</p> <p>When the form component:—Select an existing form component of your questionnaire that will be used as a reference for the condition.</p> <p>Has the value:—Define the value captured in the questionnaire for the form component selected above to complete the conditional statement.</p> |

| Type | Component | Description |
|------|---------------------------|--|
| | <p>Cholesterol</p> | <p>A group of input fields for Cholesterol including LDL Cholesterol, HDL Cholesterol, Total Cholesterol, and Triglycerides. Each value can be configured to independently. The following is a description of the options on each tab:</p> <p>Data Tab:</p> <p>LDL Cholesterol mg/dl—A check box to include this cholesterol measurement.</p> <p>HDL Cholesterol mg/dl—A check box to include this cholesterol measurement.</p> <p>Total Cholesterol mg/dl—A check box to include this cholesterol measurement.</p> <p>Triglycerides mg/dl—A check box to include this cholesterol measurement.</p> <p>Save to Patient Profile—A check box to allow the cholesterol measurement to be saved to the patient profile.</p> <p>Validation Tab:</p> <p>Require LDL Cholesterol—A check box to require this cholesterol measurement.</p> <p>Require HDL Cholesterol—A check box to require this cholesterol measurement.</p> <p>Require Total Cholesterol—A check box to require this cholesterol measurement.</p> <p>Require Triglycerides—A check box to require this cholesterol measurement.</p> <p>Conditional Tab:</p> <p>This component should Display:—Choose True or False to display this component within the questionnaire based on the field values below.</p> <p>When the form component:—Select an existing form component of your questionnaire that will be used as a reference for the condition.</p> <p>Has the value:—Define the value captured in the questionnaire for the form component selected above to complete the conditional statement.</p> |

| Type | Component | Description |
|------|------------------------|---|
| | Body Mass Index | <p>An input field to capture Body Mass Index. The following is a description of the options on each tab:</p> <p>Data Tab:</p> <p>Body Mass Index—A check box to include BMI.</p> <p>Save to Patient Profile—A check box to allow the Body Mass Index value to be saved to the patient profile.</p> <p>Validation Tab:</p> <p>Required—A check box to require the Body Mass Index to be filled in before the questionnaire is submitted.</p> <p>Conditional Tab:</p> <p>This component should Display:—Choose True or False to display this component within the questionnaire based on the field values below.</p> <p>When the form component:—Select an existing form component of your questionnaire that will be used as a reference for the condition.</p> <p>Has the value:—Define the value captured in the questionnaire for the form component selected above to complete the conditional statement.</p> |
| | Program Code | <p>A custom field configured by the Admin to capture ICD-9, ICD-10 or Custom codes for the patient. The following is a description of the options on each tab:</p> <p>Display Tab:</p> <p>Label—The label that will appear above the Select component on the questionnaire.</p> <p>Description—Description text that will appear below the Select component on the questionnaire.</p> <p>Tooltip—A tooltip that will appear on the right side of the Select on the questionnaire.</p> <p>Data Tab:</p> <p>Program Codes—Allows for the association of codes to a patient. Use the Add Another button to add additional codes.</p> <p>Save to Patient Profile—A check box to allow the information to be saved to the patient profile.</p> <p>Conditional Tab:</p> <p>This component should Display:—Choose True or False to display this component within the questionnaire based on the field values below.</p> <p>When the form component:—Select an existing form component of your questionnaire that will be used as a reference for the condition.</p> <p>Has the value:—Define the value captured in the questionnaire for the form component selected above to complete the conditional statement.</p> |

| Type | Component | Description |
|--------|-----------|---|
| Layout | Tabs | <p>Organize questionnaire components into a click-able tab or tabs. The following is a description of the options on each tab of the Tabs component:</p> <p>Display Tab:</p> <p>Label—The label that will appear above the component on the questionnaire.</p> <p>Tabs—The Label and Key for the tab. Use the Add Another button to add additional tabs.</p> <p>Conditional Tab:</p> <p>This component should Display:—Choose True or False to display this component within the questionnaire based on the field values below.</p> <p>When the form component:—Select an existing form component of your questionnaire that will be used as a reference for the condition.</p> <p>Has the value:—Define the value captured in the questionnaire for the form component selected above to complete the conditional statement.</p> |
| | Columns | <p>Organize questionnaire components into columns. The following is a description of the options on each tab:</p> <p>Display Tab:</p> <p>Label—The label that will appear above the component on the questionnaire.</p> <p>Column Properties—The width for each column. The width for all columns must add up to 12. Use the Add Column button to add columns.</p> <p>Conditional Tab:</p> <p>This component should Display:—Choose True or False to display this component within the questionnaire based on the field values below.</p> <p>When the form component:—Select an existing form component of your questionnaire that will be used as a reference for the condition.</p> <p>Has the value:—Define the value captured in the questionnaire for the form component selected above to complete the conditional statement.</p> |

| Type | Component | Description |
|------|---------------------|---|
| | <p>Table</p> | <p>Organize questionnaire components into a table of rows and columns. The following is a description of the options on each tab:</p> <p>Display Tab:</p> <p>Label—The label that will appear above the component on the questionnaire.</p> <p>Number of Rows—Enter the number of rows for the table.</p> <p>Number or Columns—Enter the number of columns for the table.</p> <p>Striped—A check box to stripe the table.</p> <p>Bordered—A check box to add a border to the table.</p> <p>Hover—A check box to add the ability to hover and highlight a row.</p> <p>Conditional Tab:</p> <p>This component should Display:—Choose True or False to display this component within the questionnaire based on the field values below.</p> <p>When the form component:—Select an existing form component of your questionnaire that will be used as a reference for the condition.</p> <p>Has the value:—Define the value captured in the questionnaire for the form component selected above to complete the conditional statement.</p> |
| | <p>Panel</p> | <p>Organize questionnaire components into a panel arrangement. The following is a description of the options on each tab:</p> <p>Display Tab:</p> <p>Title—Title text that appears in the header of the panel.</p> <p>Theme—Choose one of three available themes for the panel.</p> <p>Custom CSS Class—Add Custom CSS Class to the panel.</p> <p>Collapsible—A check box to allow the panel to be collapsible.</p> <p>Conditional Tab:</p> <p>This component should Display:—Choose True or False to display this component within the questionnaire based on the field values below.</p> <p>When the form component:—Select an existing form component of your questionnaire that will be used as a reference for the condition.</p> <p>Has the value:—Define the value captured in the questionnaire for the form component selected above to complete the conditional statement.</p> |

| Type | Component | Description |
|------|--------------------|---|
| | <p>Well</p> | <p>Organize questionnaire components into a well container that displays with rounded corners and a gray background.</p> <p>Display Tab:</p> <p>Label—The label that will appear above the component on the questionnaire.</p> <p>Conditional Tab:</p> <p>This component should Display:—Choose True or False to display this component within the questionnaire based on the field values below.</p> <p>When the form component:—Select an existing form component of your questionnaire that will be used as a reference for the condition.</p> <p>Has the value:—Define the value captured in the questionnaire for the form component selected above to complete the conditional statement.</p> |

Enrollment and Program Alert Data Filters

Note: Pharmserv version 7.5.0.0 or greater or EnterpriseRx 6.1.0.0 or greater is required unless noted otherwise

| Data | Attribute | Value(s) | |
|-------------------|----------------------|---|--|
| | | Pharmserv | EnterpriseRx |
| Written Product | Product Name | Text Field | Text/Search Field |
| Written Product | NDC Number 11 Digits | Text Field | Text/Search Field |
| Written Product | NDC Number 9 Digits | Text Field | Text/Search Field |
| Written Product | NDC Number 5 Digits | Text Field | Text/Search Field |
| Written Product | Product Schedule | 2 3 4 5 6 - Legend Rx Blank - No Control | 2 3 4 5 6 - Legend Rx 8 - OTC Blank - No Control |
| Written Product | GPI GCN | Text Field | Text/Search Field |
| Written Product | Product Groups | Text Field Note: You must populate the Value field with the information found in either the Clinical Category Group or Clinical Category Class field for the type of item. This information displays on the Clinical Information window of Item Maintenance in Rx Processing. It must be entered exactly as it displays in those fields | Text |
| Dispensed Product | Product Name | Text Field | Text/Search Field |

| Data | Attribute | Value(s) | |
|-------------------|----------------------------|---|--|
| | | Pharmaserv | EnterpriseRx |
| Dispensed Product | NDC Number 11 Digits | Text Field | Text/Search Field |
| Dispensed Product | NDC Number 9 Digits | Text Field | Text/Search Field |
| Dispensed Product | NDC Number 5 Digits | Text Field | Text/Search Field |
| Dispensed Product | Product Schedule | 2 3 4 5 6 - Legend Rx Blank - No Control | 2 3 4 5 6 - Legend Rx 8 - OTC Blank - No Control |
| Dispensed Product | GPI GCN | Text Field | Text/Search Field |
| Dispensed Product | Product Groups | Text Field Note: You must populate the Value field with the information found in either the Clinical Category Group or Clinical Category Class field for the type of item. This information displays on the Clinical Information window of Item Maintenance in Rx Processing. It must be entered exactly as it displays in those fields | Text Field |
| Patient | Patient Status | Active | Active |
| Patient | Enrolled Programs | Populated by CPS | Populated by CPS |
| Patient | Non Enrolled Programs | Populated by CPS | Populated by CPS |
| Patient | Blood Pressure Systolic | Populated by CPS | Populated by CPS |
| Patient | Blood Pressure Diastolic | Populated by CPS | Populated by CPS |
| Patient | Blood Glucose Fasting | Populated by CPS | Populated by CPS |
| Patient | Blood Glucose Postprandial | Populated by CPS | Populated by CPS |

| Data | Attribute | Value(s) | |
|---------|---------------------|---|---|
| | | Pharmaserv | EnterpriseRx |
| Patient | Blood Glucose A1c | Populated by CPS | Populated by CPS |
| Patient | Cholesterol LDL | Populated by CPS | Populated by CPS |
| Patient | Cholesterol HDL | Populated by CPS | Populated by CPS |
| Patient | Total Cholesterol | Populated by CPS | Populated by CPS |
| Patient | Triglycerides | Populated by CPS | Populated by CPS |
| Patient | BMI | Populated by CPS | Populated by CPS |
| Patient | Pulse | Populated by CPS | Populated by CPS |
| Patient | Cholesterol PDC | Populated by CPS/APS | Populated by CPS/APS |
| Patient | Hypertension PDC | Populated by CPS/APS | Populated by CPS/APS |
| Patient | Diabetes PDC | Populated by CPS/APS | Populated by CPS/APS |
| Patient | SUPD | Populated by CPS/APS | Populated by CPS/APS |
| Patient | HRM | Populated by CPS/APS | Populated by CPS/APS |
| Patient | Codes | Populated by CPS | Populated by CPS |
| Patient | Additional Data | Populated by CPS | Populated by CPS |
| Patient | Patient Groups | Pharmaserv Does Not Support This Data Filter | Text Field |
| Patient | Smoker Code | 1 - Non Smoker 2 - Smoker Blank - Not Specified | 1 - Non Smoker 2 - Smoker Blank - Not Specified |
| Patient | Pregnancy Indicator | 1 - Not Pregnant 2 - Pregnant Blank - Not Specified | 1 - Not Pregnant 2 - Pregnant Blank - Not Specified |
| Patient | Terminally Ill | Pharmaserv Does Not Support This Data Filter | Yes No |
| Patient | Age | Text Field | Text Field |
| Patient | Allergy Code | Pharmaserv Does Not Support This Data Filter | Text/Search Field |
| Patient | Allergy Description | Pharmaserv Does Not Support This Data Filter | Text Field * ERx 9.1.0.0 or Greater |

| Data | Attribute | Value(s) | |
|----------|-------------------|--|--|
| | | Pharmaserv | EnterpriseRx |
| Patient | Gender Code | Male Female Other | Male Female |
| Patient | Zip | Text Field | Text Field |
| Patient | State | Text Field | Text Field |
| Patient | Care Location | Blank - Not Specified 1 - Home 2 - Inner Care 3 - Nursing Home 4 - Long Term Extended Care 5 - Rest Home 6 - Boarding Home 7 - Skilled Care Facility 8 - Sub-Acute Care Facility 9 - Acute Care Facility 10 - Outpatient 11 - Hospice | 0 - Not Specified 1 - Home 2 - Inner Care 3 - Nursing Home 4 - Long Term Extended Care 5 - Rest Home 6 - Boarding Home 7 - Skilled Care Facility 8 - Sub-Acute Care Facility 9 - Acute Care Facility 10 - Outpatient 11 - Hospice |
| Facility | Facility Type | Pharmaserv Does Not Support This Data Filter | Retail Store Central Prep Central Fulfillment Corporate Office Call Center Training Center |
| Facility | State | Text Field | Text Field |
| Facility | Zip | Text Field | Text Field |
| Facility | NCPDP Provider ID | Text Field | Text Field |

| Data | Attribute | Value(s) | |
|------------|--------------------------|---|---|
| | | Pharmaserv | EnterpriseRx |
| Rx | Rx Status | Active Profiled Discontinued | Active Profiled Canceled Pending Approval Inactive DUR Rx Transferred Inactive Profiled Inactive DUR Rx Denied |
| Rx | Rx Fill | New Refill | New Refill |
| Rx | Prescription Origin Code | 0 - Not Known 1 - Written 2 - Telephone 3 - Electronic 4 - Facsimile 5 - Pharmacy Blank - Blank | 0 - Not Known 1 - Written 2 - Telephone 3 - Electronic 4 - Facsimile 5 - Pharmacy Blank - Blank |
| Fill Level | Item Source | Pharmaserv Does Not Support This Data Filter | Unspecified SYNC IVR PPI Fax ERP Phone Mail Internet Store |
| Fill Level | Delivery Option | Pharmaserv Does Not Support This Data Filter | Text Field |
| Fill Level | Fill Number | Text Field | Text Field |

| Data | Attribute | Value(s) | |
|------------|---------------------------|---|--|
| | | Pharmaserv | EnterpriseRx |
| Fill Level | Third Party Name | Text Field You MUST enter data exactly as it displays in Pharmaserv. For cash claims, you need to enter Cash ; for AR charge claims, you need to enter Charge . | Text Field |
| Fill Level | Third Party Code | Text Field | Text Field |
| Fill Level | Group ID | Pharmaserv Does Not Support This Data Filter | Text Field * ERx 9.1.0.0 or Greater |
| Fill Level | Cash Payment | Pharmaserv Does Not Support This Data Filter | Text Field * ERx 9.1.0.0 or Greater |
| Fill Level | Third Party Group ID | Pharmaserv Does Not Support This Data Filter | Text Field * ERx 9.1.0.0 or Greater |
| Fill Level | Third Party PCN | Pharmaserv Does Not Support This Data Filter | Text Field * ERx 9.1.0.0 or Greater |
| Fill Level | Third Party BIN | Pharmaserv Does Not Support This Data Filter | Text Field * ERx 9.1.0.0 or Greater |
| Fill Level | Third Party Cardholder ID | Pharmaserv Does Not Support This Data Filter | Text Field * ERx 9.1.0.0 or Greater |
| Fill Level | Medicare | Yes No | Yes No |
| Fill Level | Medicaid | Yes No | Yes No |
| Prescriber | Specialty 1 | Pharmaserv Does Not Support This Data Filter | See System Options |
| Prescriber | Specialty 2 | Pharmaserv Does Not Support This Data Filter | See System Options |
| Prescriber | Specialty 3 | Pharmaserv Does Not Support This Data Filter | See System Options |
| Prescriber | State | Text Field | Text Field |
| Prescriber | Zip | Text Field | Test Field |

| Data | Attribute | Value(s) | |
|------------|-----------|--|--|
| | | Pharmaserv | EnterpriseRx |
| Prescriber | NPI | Pharmaserv Does Not Support This Data Filter | Text Field * ERx 9.1.0.0 or Greater |
| Prescriber | DEA | Pharmaserv Does Not Support This Data Filter | Text Field * ERx 9.1.0.0 or Greater |