CPS User Guide with EnterpriseRx®

Release 3.2.0

11/24/2021

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Chapter 9: CPS Matching Queue

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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	**Boldface** text is used when referring to the name of a window element, such as the following examples: • 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	**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. When viewing as a PDF, Select the link by holding down the **Ctrl** button and selecting the link in order to go to the desired location.
Note: or Notes:	This is used to inform you of some key points or to add some information about the subject or task, such as the following: **Note:** Field Names preceded by an asterisk (*) are required fields.
Important:	This is used to alert you about some information that is necessary to successfully complete a task, such as the following:

Convention	Meaning
	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].
Caution:	This is used to warn you about potential problems for a task you are performing, such as the following: **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.
Tip:	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: **Tip:** For Self-Directed Programs, you'll be making your own decisions on what your filters include.

Chapter 1: Introduction to McKesson's 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, window displays and terminology in this document may be different based on your Pharmacy Management System.

Key Features In Clinical Programs Solution

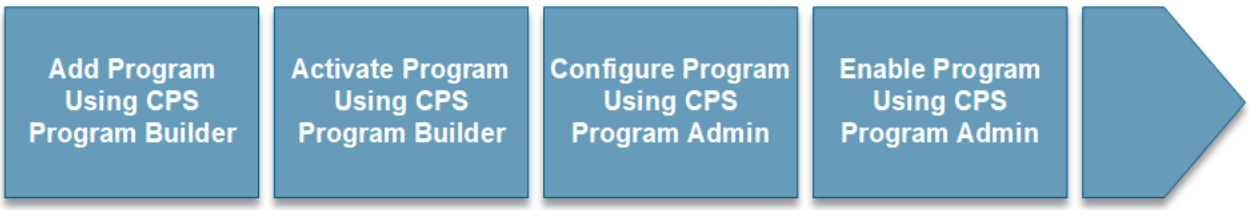
- "Connect with Integrated Third Party Vendor Solutions" below
- "Build Your Own Custom Programs" on the next page
- "Stay Abreast of Program Alerts During Workflow" on page 15
- "Take Action on Program Enrollments & Alerts Outside of Workflow" on page 16
- "Access a Comprehensive CPS Patient Profile" on page 17

Connect with Integrated Third Party 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**.

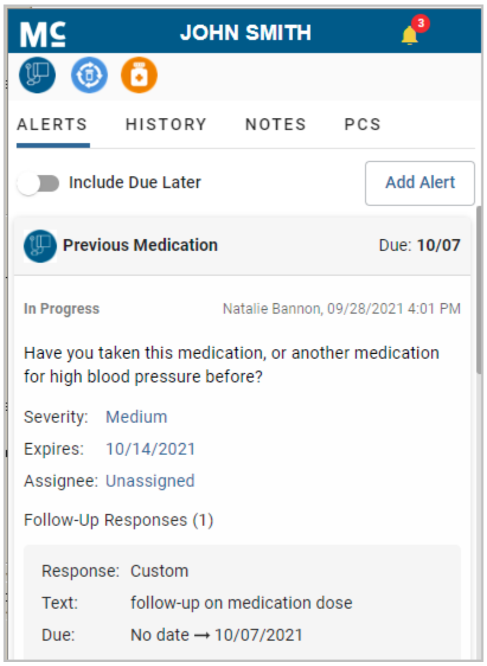


Set up Programs that will Alert your pharmacists to take actions such as:

- 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

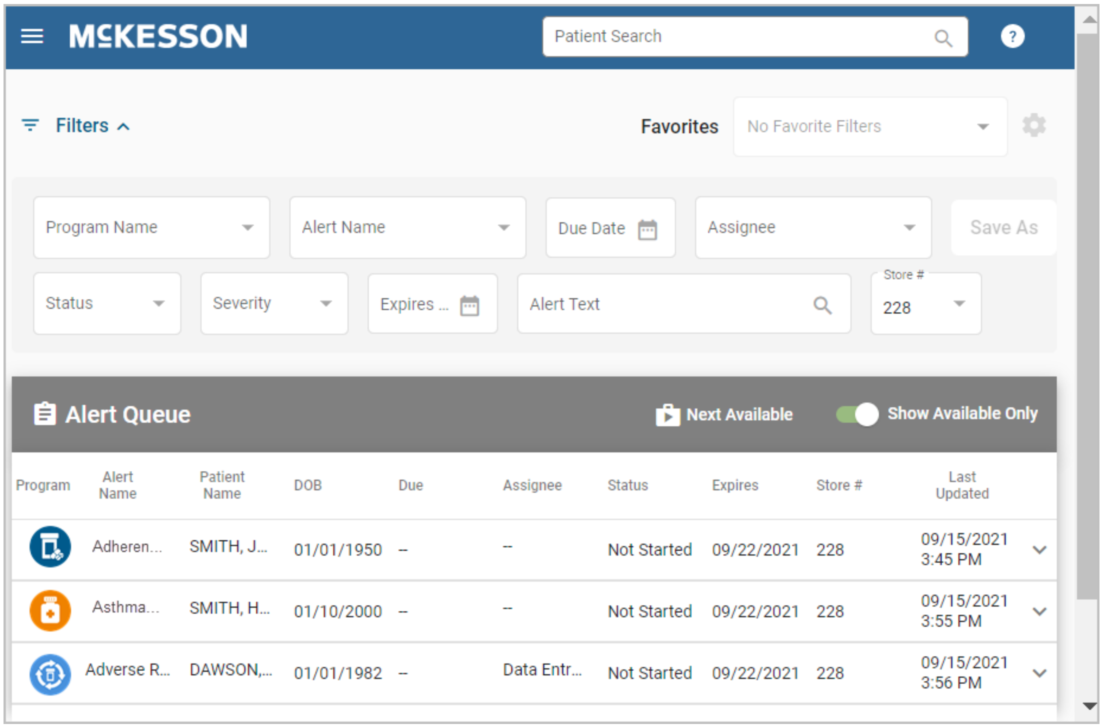
The **Clinical App** provides access to all active and historical Alerts for the patient in context, including Alerts that are triggered in workflow during prescription processing. These Alerts may provide access to a questionnaire which facilitates documentation in a repeatable, consistent process, 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).



Please refer to "CPS Alert Queue" on page 180 for more information on actions you can take on Alerts in the Alert Queue.

Take Action on Program Enrollments & Alerts Outside of Workflow

The **Alert 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.

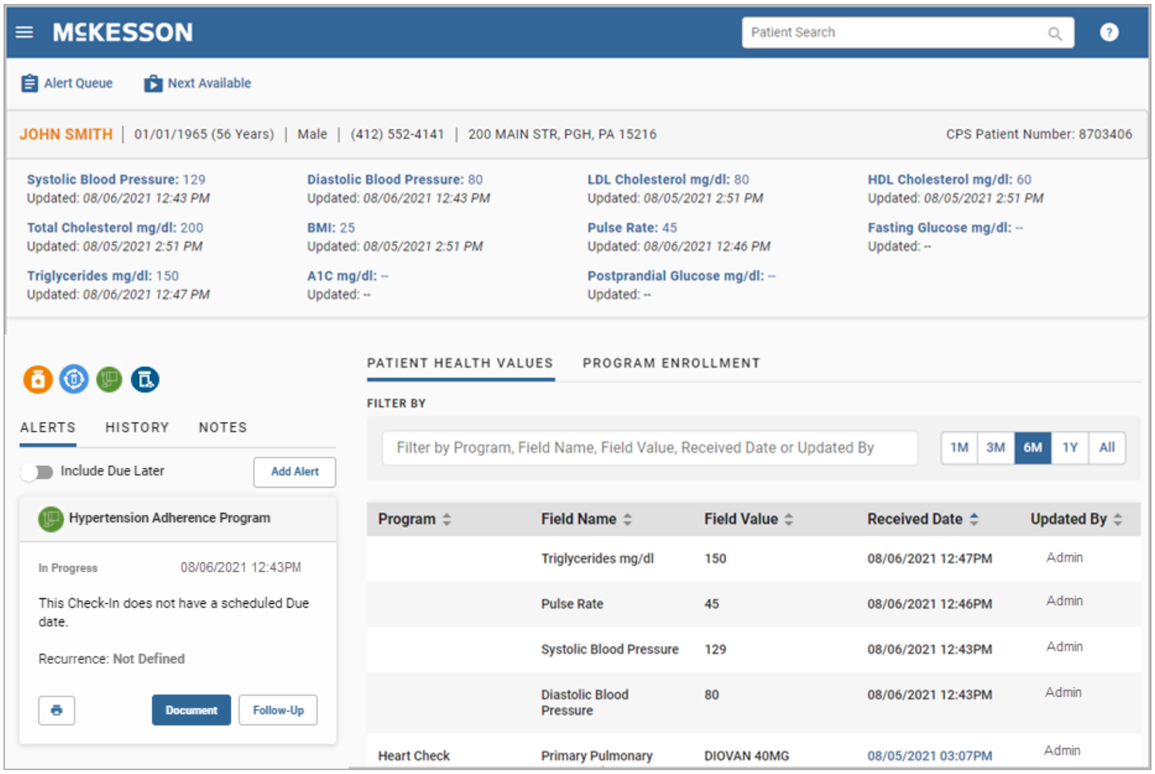


When the **Alert Queue** is opened, the default view will display all available Alerts that are past due, due now, or do not have a defined due date. To narrow down the amount of Alerts you can filter the queue by any of the following:

- 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.



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

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

Chapter 2: 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 the next page
  - "Building a Program" on the next page
- "Selecting a Program Logo & Icon" on the next page
  - "Adding a Program Logo" on page 20
  - "Adding a Program Icon" on page 20
- "Naming the Program & Entering a Program Description" on page 21
- "Choosing a Program Enrollment Type" on page 21
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  - "Questionnaire Components" on page 25
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- "Building Program Alerts" on page 44
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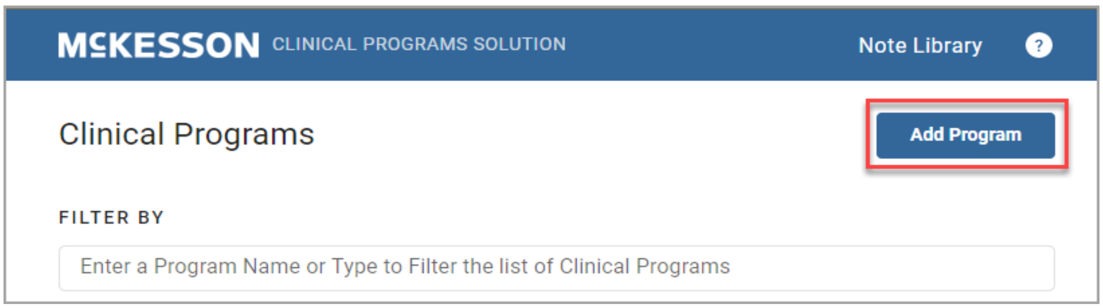
Getting Started with Program Builder

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.

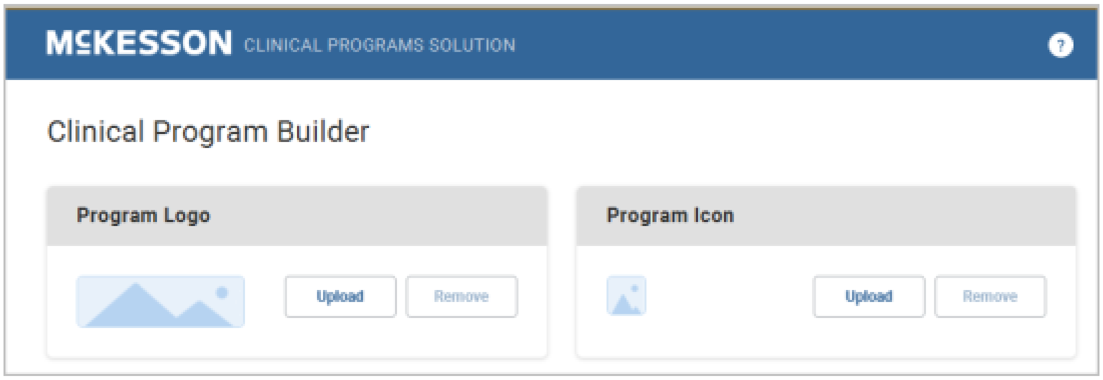


Notes:

- 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.

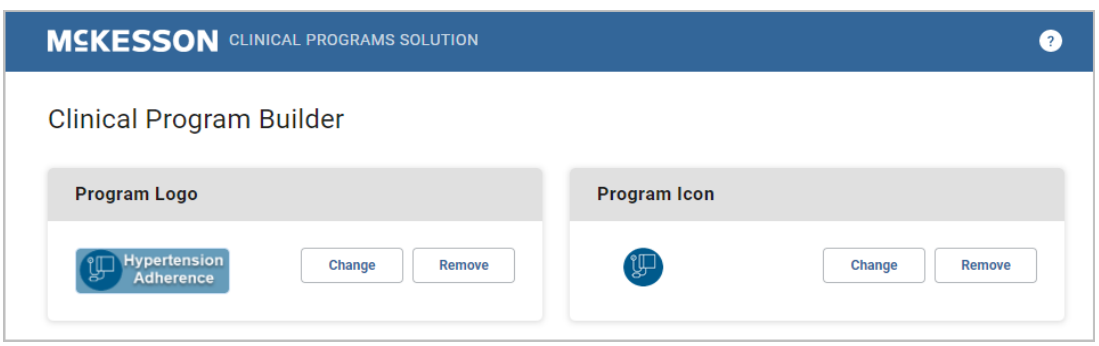


Adding a Program Logo

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.

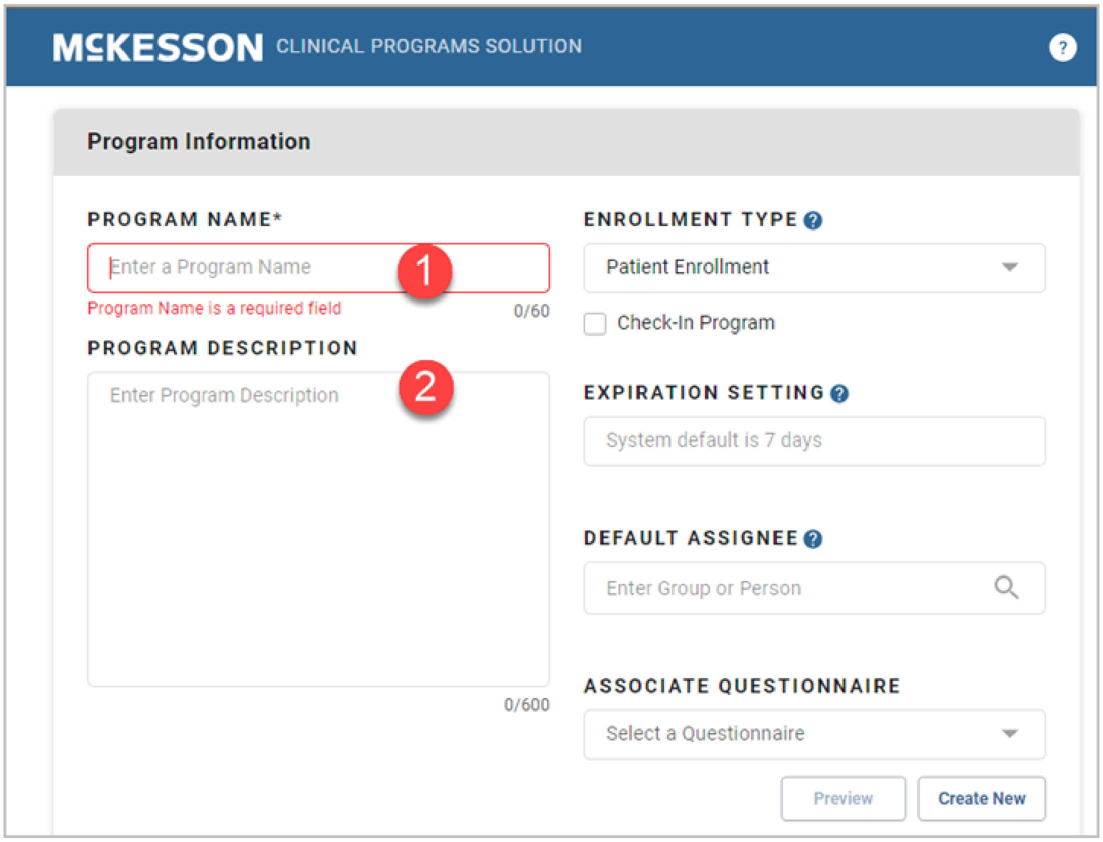
Adding a Program Icon

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



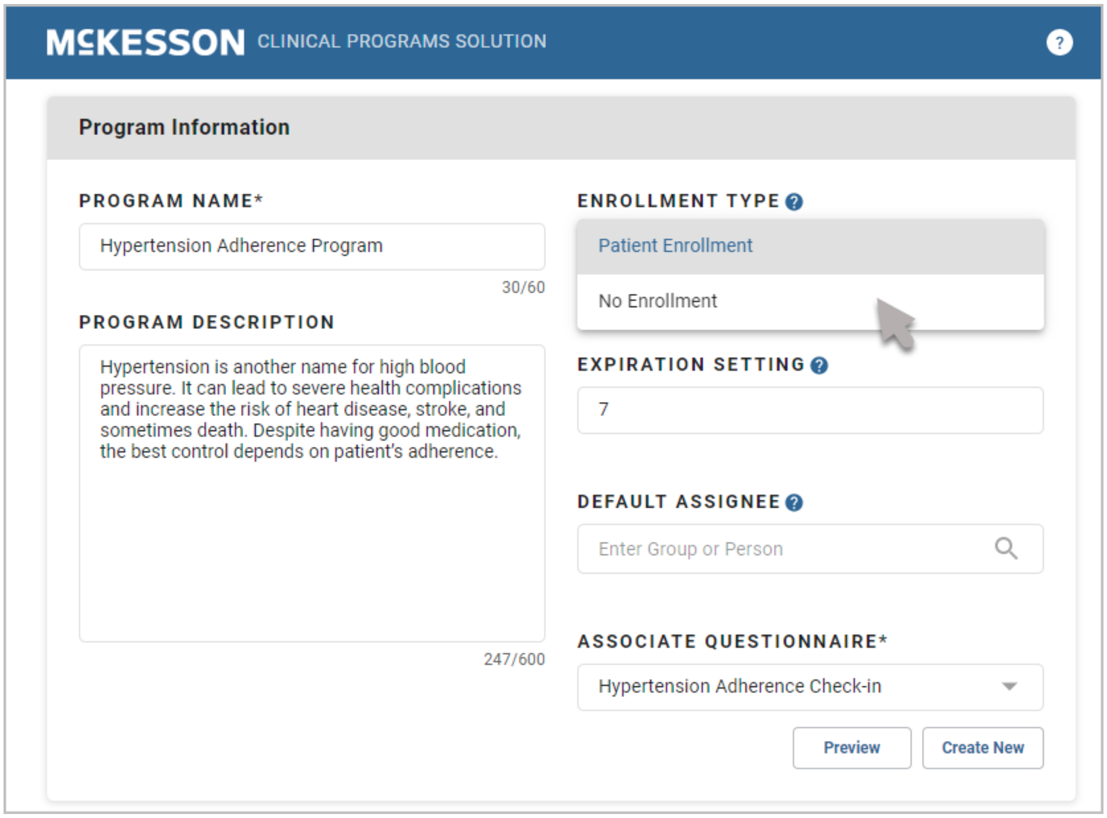
1. **To Name the Program**: Enter a Program name into the **Program Name** text field. This field is limited to 60 alphanumeric characters and no two Programs can be saved with the same name.

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.



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

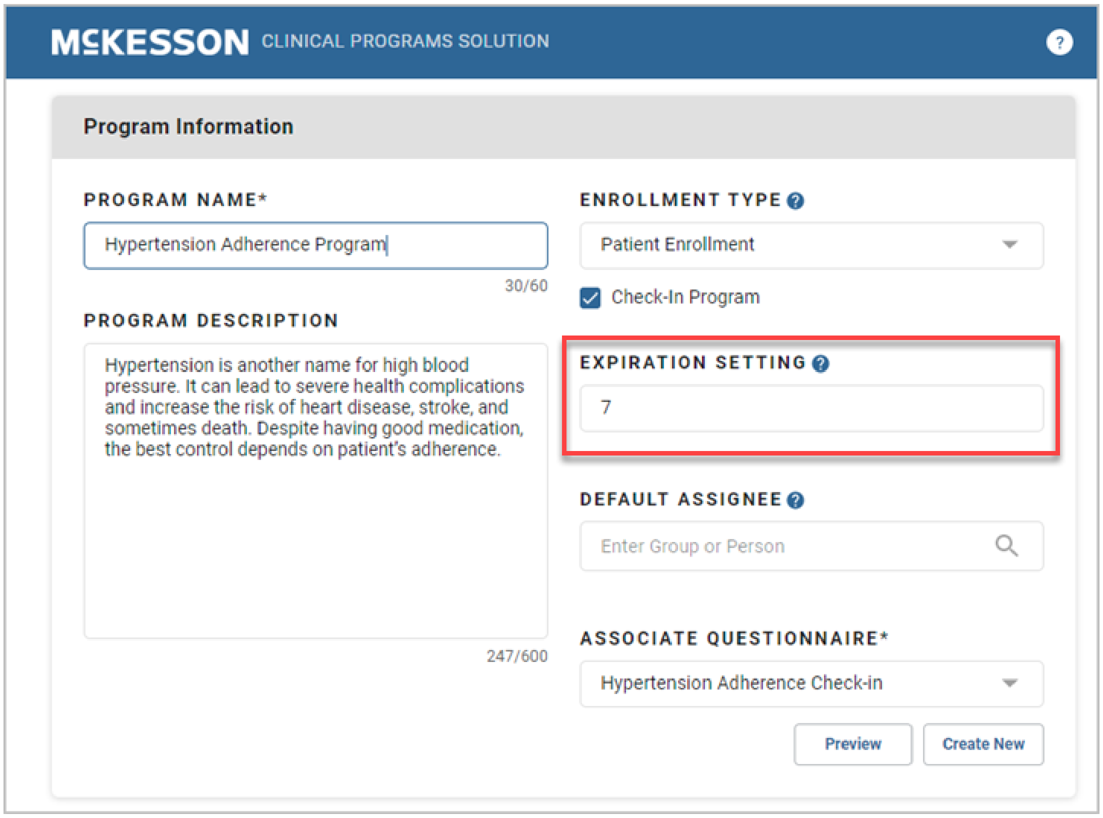
Note:
You might choose **Patient Enrollment** when you want to indicate a patient is associated with a particular Program. Enrollment Programs allow for patient data to be collected on an ongoing basis, over a period of time. For example, you might want to identify and provide ongoing counseling for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

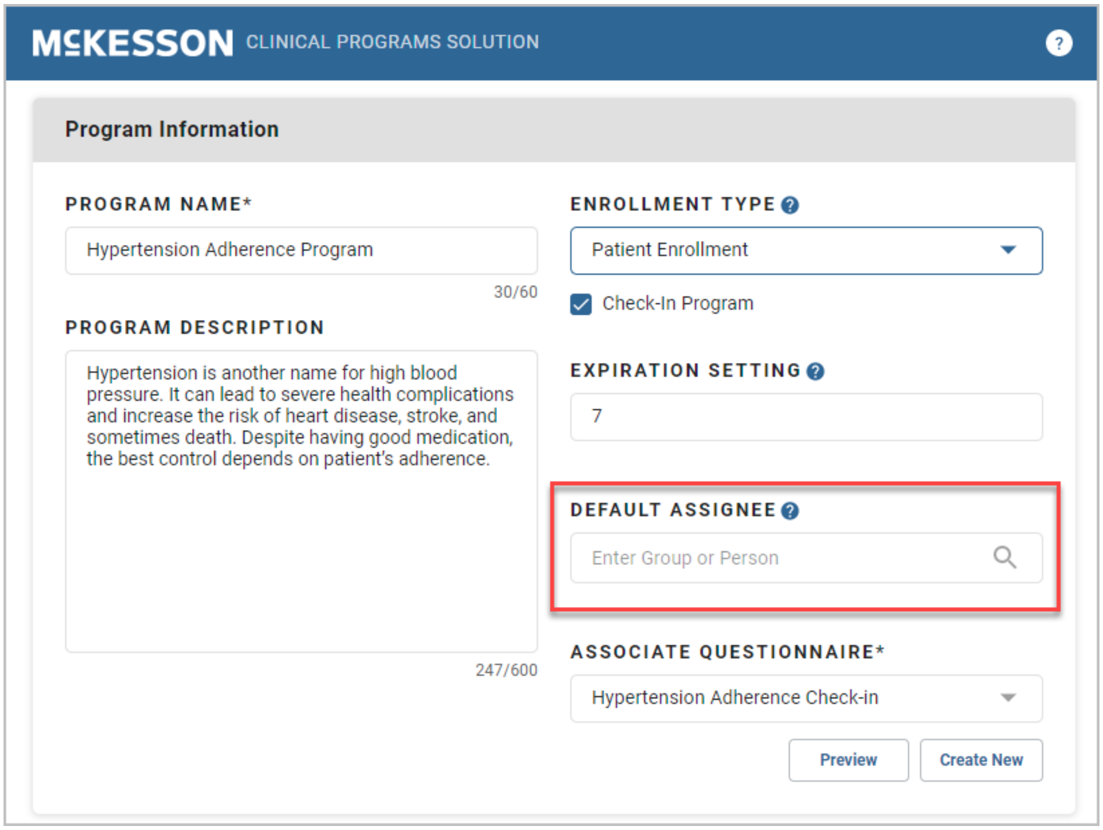
Expiration Setting for Patient Enrollment

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 **Alert 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.



Default Assignee

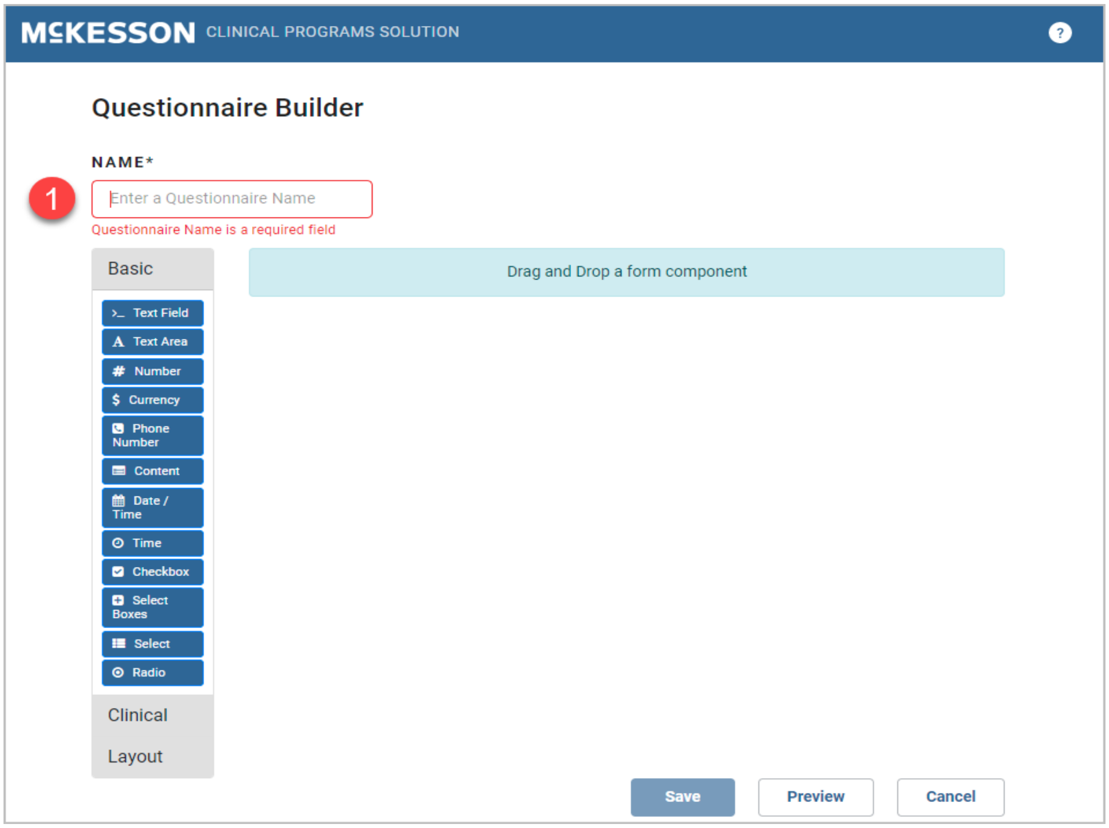
The **Default Assignee** text box allows you to define a default assignee when building programs that have an **Enrollment Type** of **Patient Enrollment**. With a default assignee set the Patient Enrollment Alerts can be directed to the appropriate resource without requiring manual involvement by pharmacy staff.



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 & Note Components" on page 275 in the Appendix for a complete list and description of components.



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

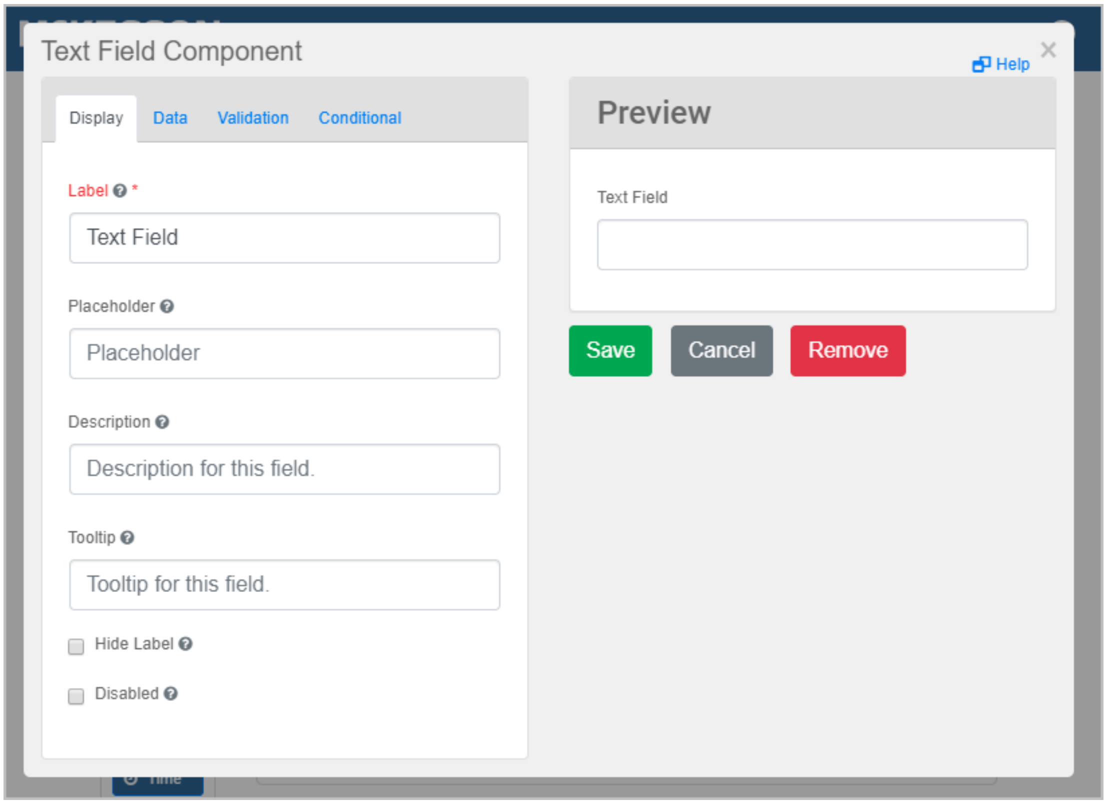
Questionnaire Components

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.

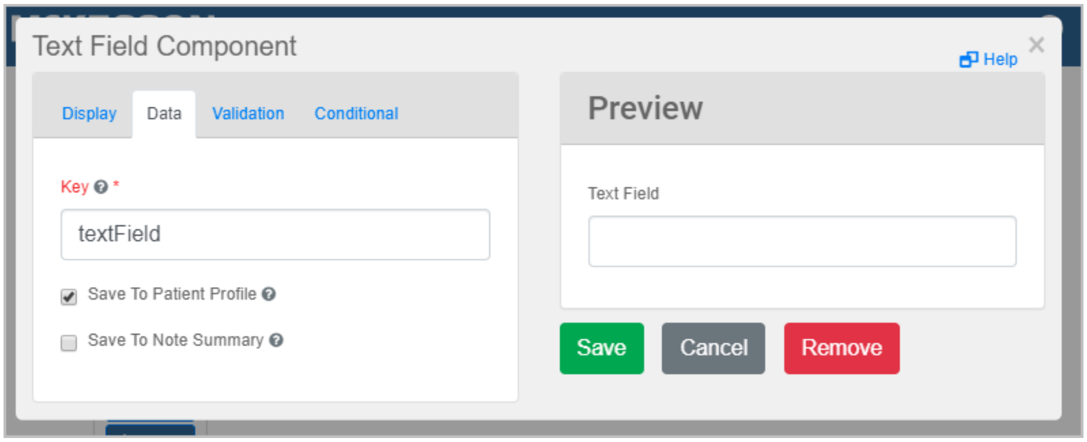
Display Tab



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

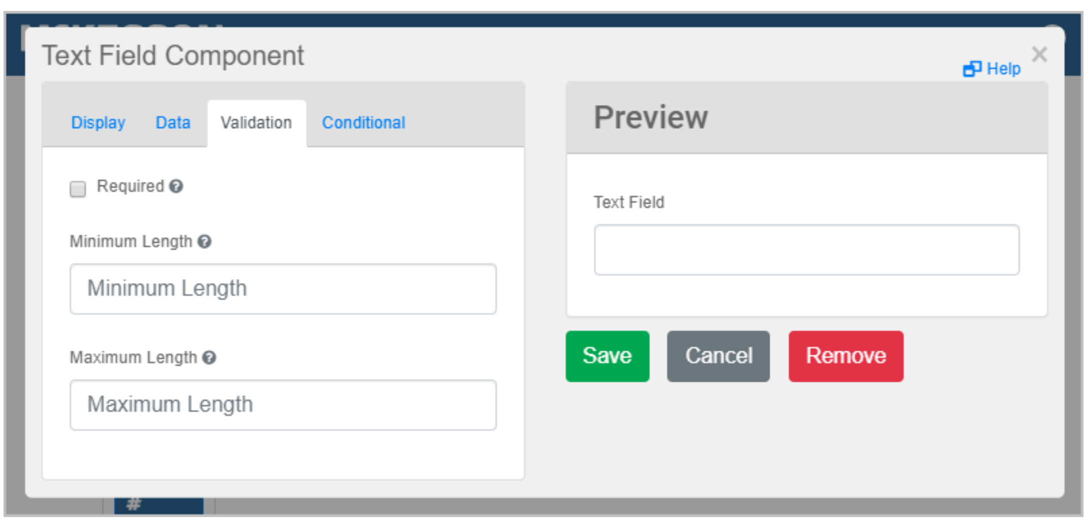
Data Tab



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

Data Tab	
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 checkbox to allow the **Text Field** value to be saved to the patient profile.
Save to Note Summary	A checkbox to allow the **Text Field** value to be saved in a note once a questionnaire is resolved. The note is accessible in the **Notes** tab of the **Clinical App**. Please refer to "Clinical App Notes Tab" on page 161 for more information about the **Notes** tab.

Validation Tab



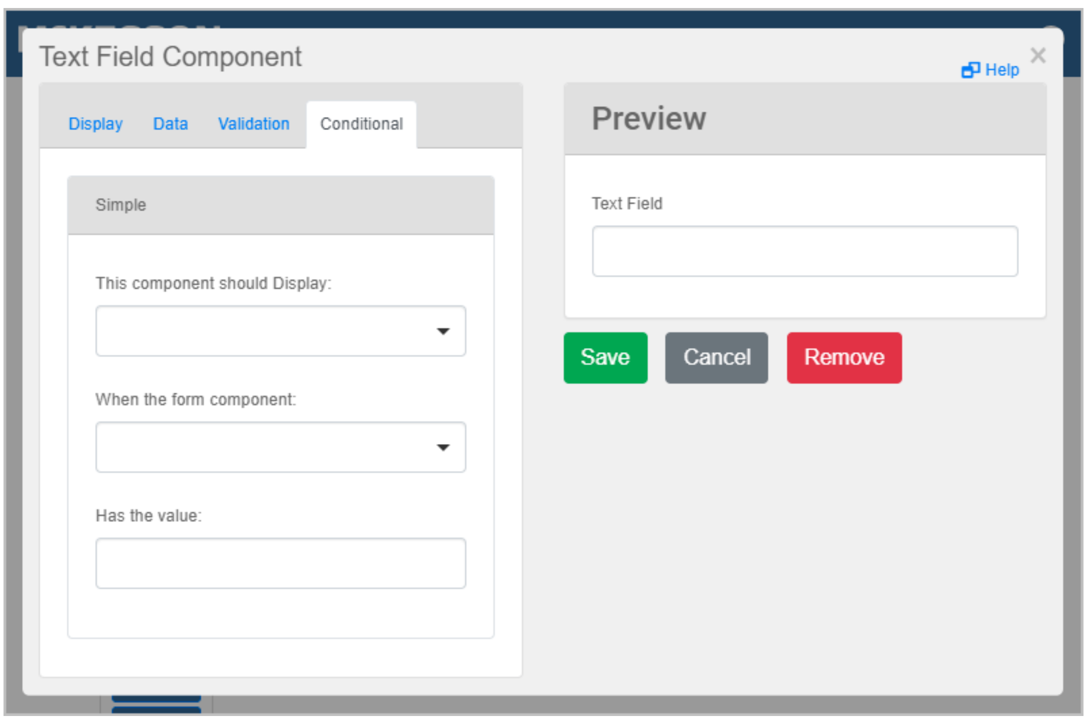
The following is a description of the fields on the **Validation** tab for the **Text Field** component:

Validation Tab	
Required	A checkbox 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

Note:
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.



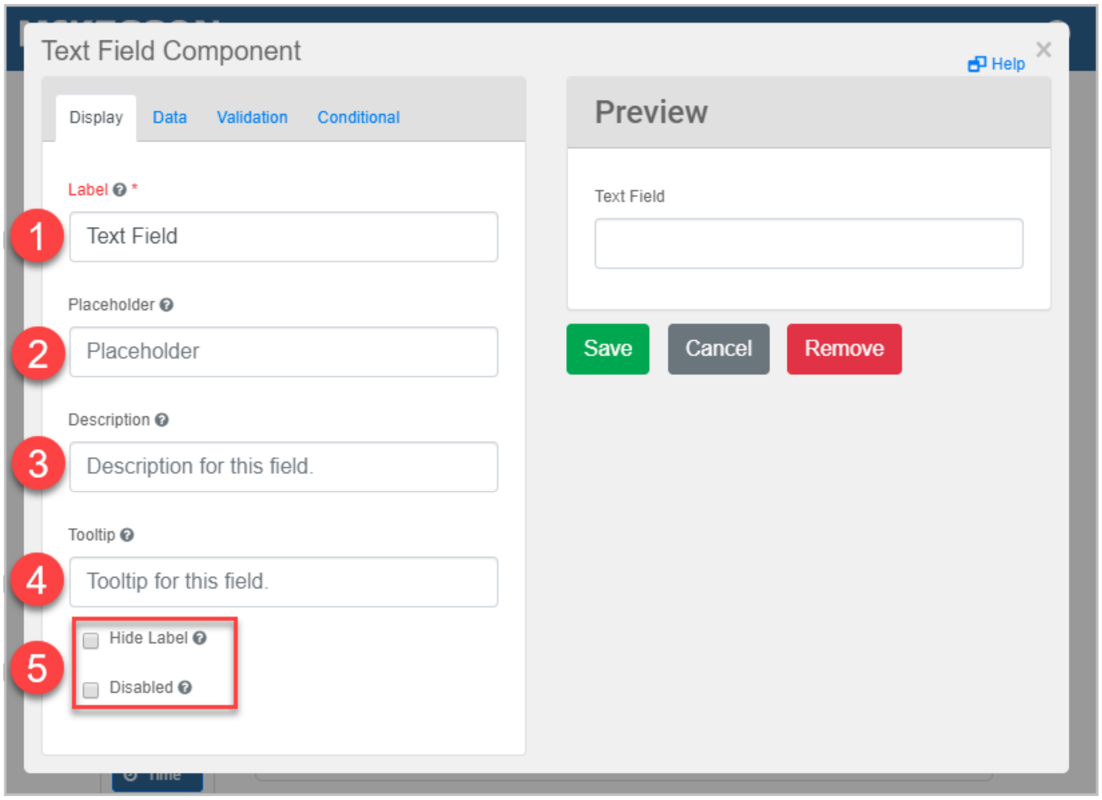
The following is a description of the fields on the **Conditional** tab for the **Text Field** component:

Conditional Tab	
This component should Display:	Choose **True** or **False** to display this component within the questionnaire based on the field values in **When the form component:** and **Has the value:**.

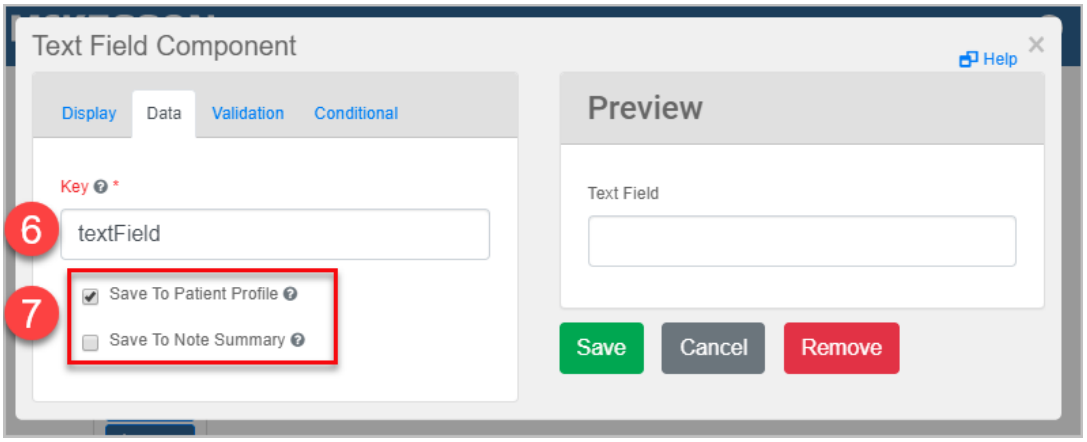
Conditional Tab	
	– Selecting **True** will display the component when the conditional statement is met. – Selecting **False** will initially display the component and when the conditional statement is met, the component will be hidden.
When the form component:	Select an existing form component of your 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.



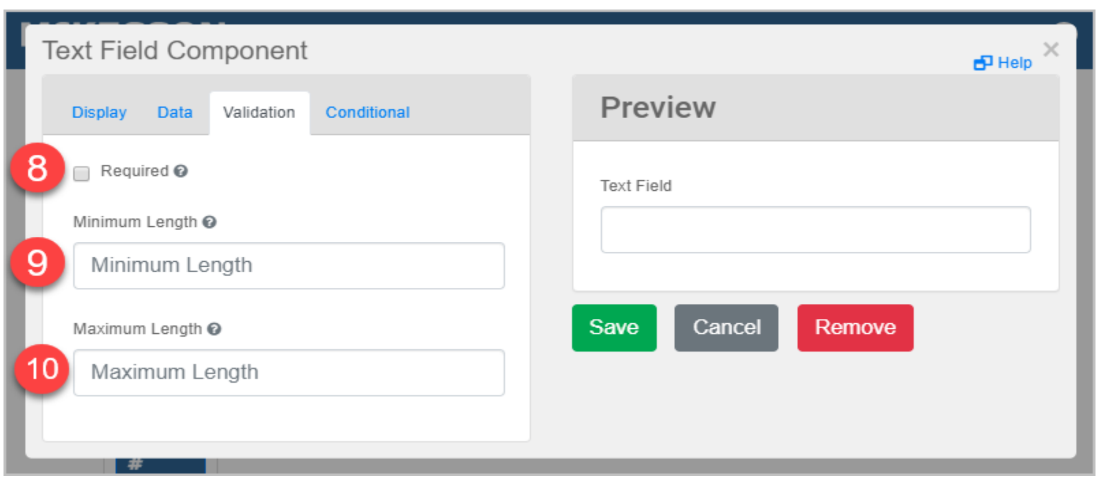
1. On the **Display** tab, type in a **Label** for the **Text Field**.
2. Enter placeholder text which is temporary text that will appear in the **Text Field** before user interaction.
3. Enter a description for the field that will appear below the **Text Field**.
4. Add a tooltip for the **Text Field** that will appear on the right side of the **Label**.
5. Use the **Hide Label** checkbox to hide the label of this component, which allows you to hide the label in the form builder, but not when it's rendered. Use the **Disabled** checkbox to make the **Text Field** disabled.



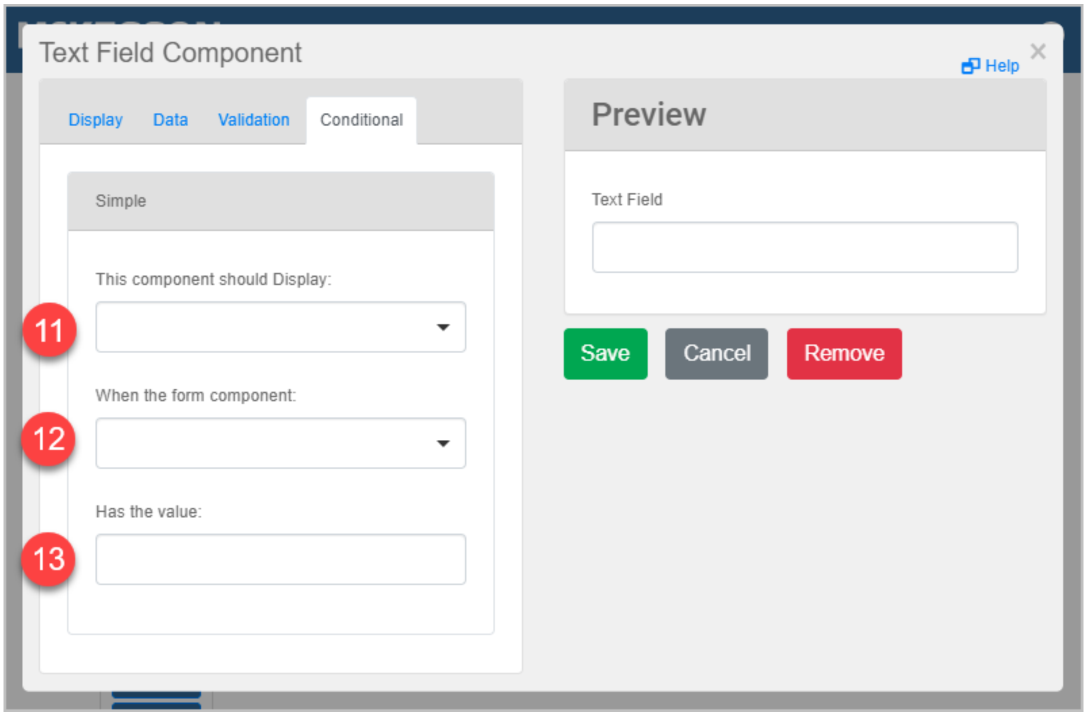
6. On the **Data** tab, enter a value in the **Key** field. The **Key** must be unique within the Program.

> **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.

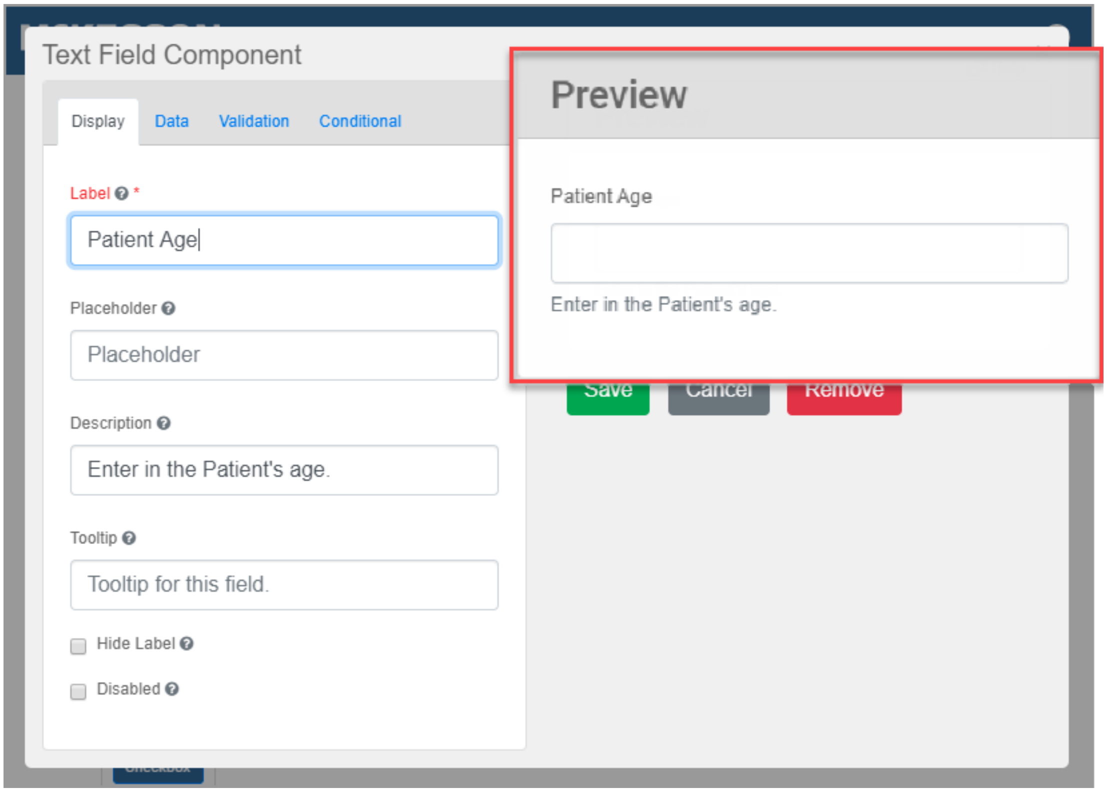
7. Use the **Save To Patient Profile** checkbox to save the **Text Field** value to the patient profile. Use the **Save To Note Summary** checkbox to save the **Text Field** value in a note once a questionnaire is resolved. The note is accessible in the **Notes** tab of the **Clinical App**. Please refer to "Clinical App Notes Tab" on page 161 for more information about the **Notes** tab.



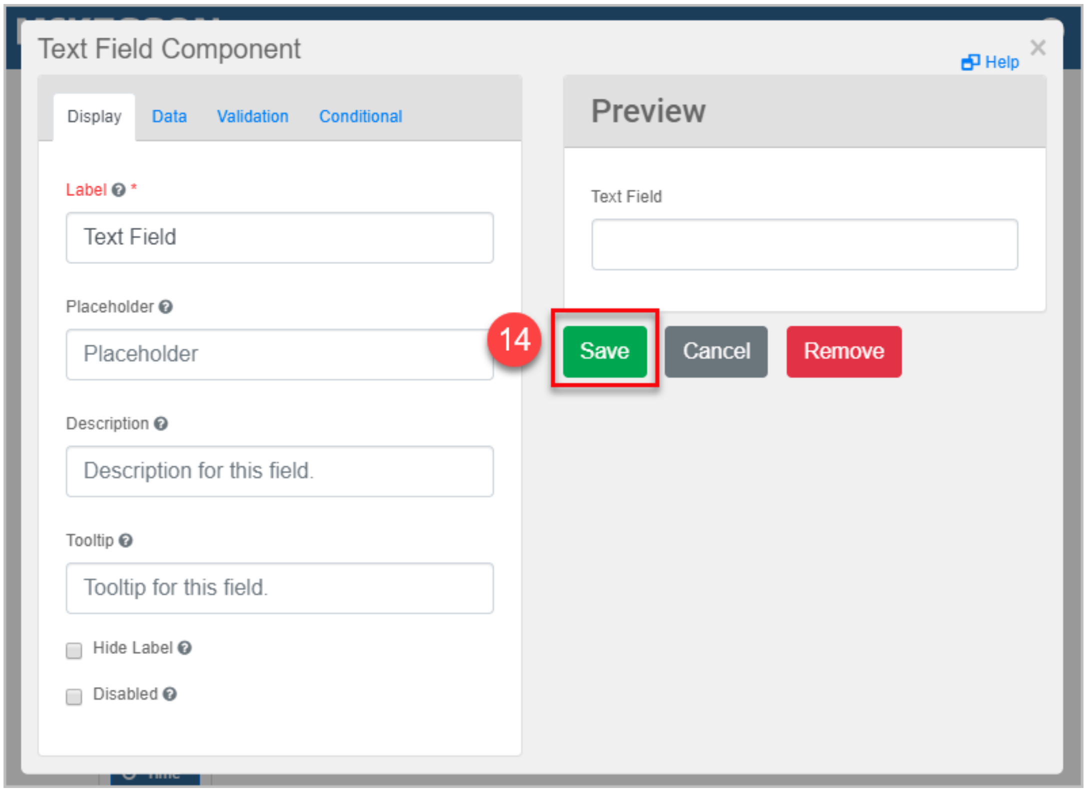
8. On the **Validation** tab, select whether or not to make the **Text Field** required.
9. Enter the minimum length requirement the **Text Field** must meet.
10. Enter the maximum length requirement the **Text Field** must meet.



11. On the **Conditional** tab, choose **True** or **False** to display this component within the questionnaire based on the field values in steps 12 and 13.
    - Selecting **True** will display the component when the conditional statement is met.
    - Selecting **False** will initially display the component and when the conditional statement is met, the component will be hidden.
12. Select an existing form component of your questionnaire that will be used as a reference for the condition.
13. Define the value captured in the questionnaire for the form component selected in step 12 to complete the conditional statement.



Tip:
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.



14. Select the **Save** button to add the **Text Field** to the questionnaire.

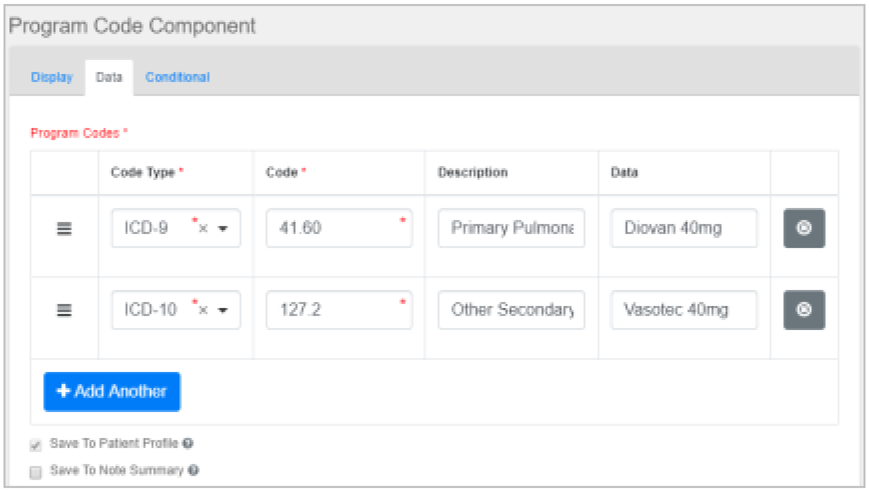
To add more fields to the form, return to step 1 above and repeat the remaining steps as applicable to the component.

Entering Program Codes

The **Program Codes Component** is a form component that allows 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**:

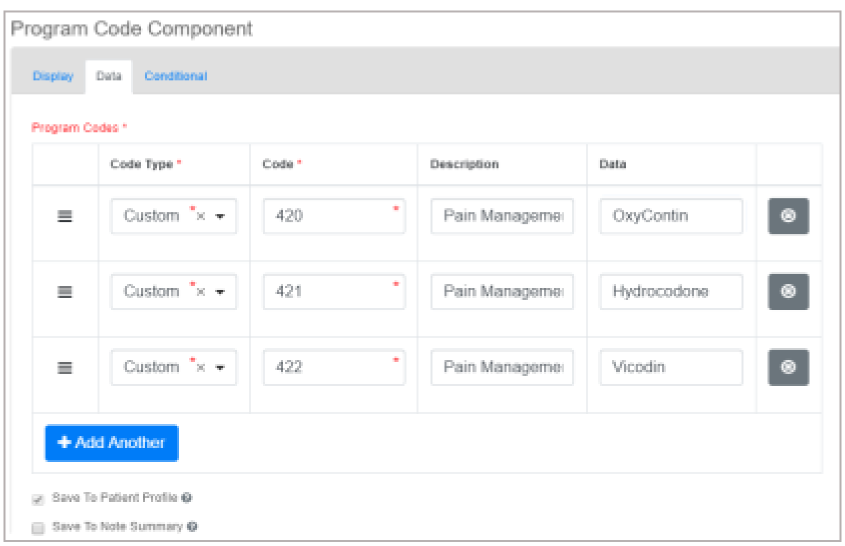


The questionnaire could be designed to require questions or data fields to be completed along with the selection of Program Codes in order to complete a questionnaire.

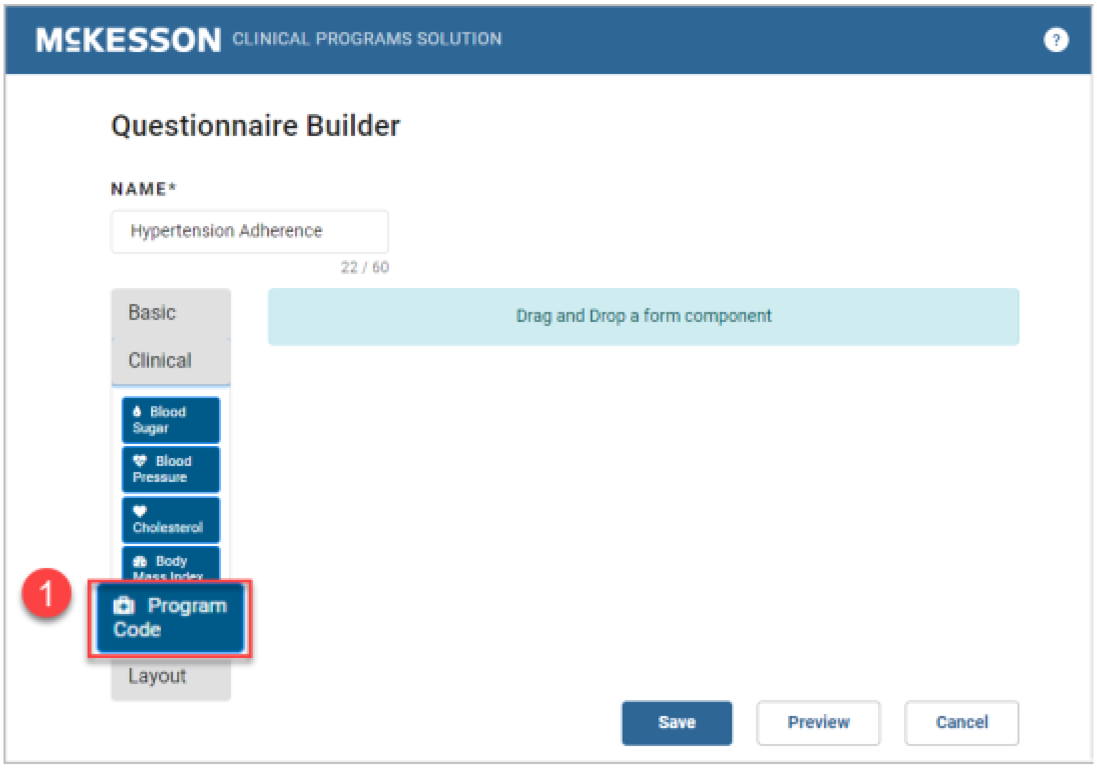
Program Codes Example #2

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.

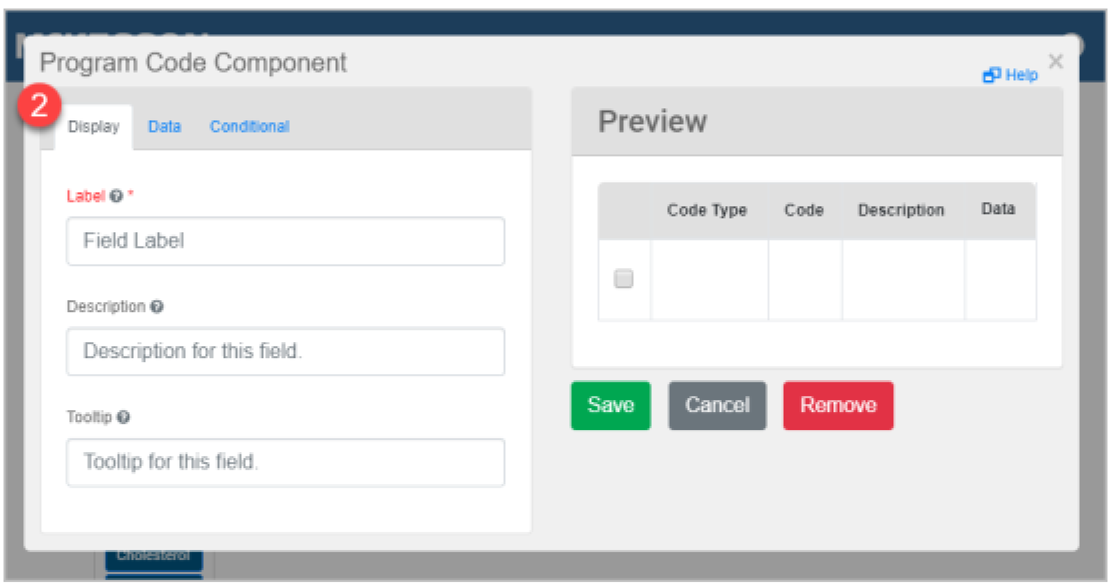
The **Custom Code Type** could be any code, description, or data that the Program requires. For example:



Entering Program Codes

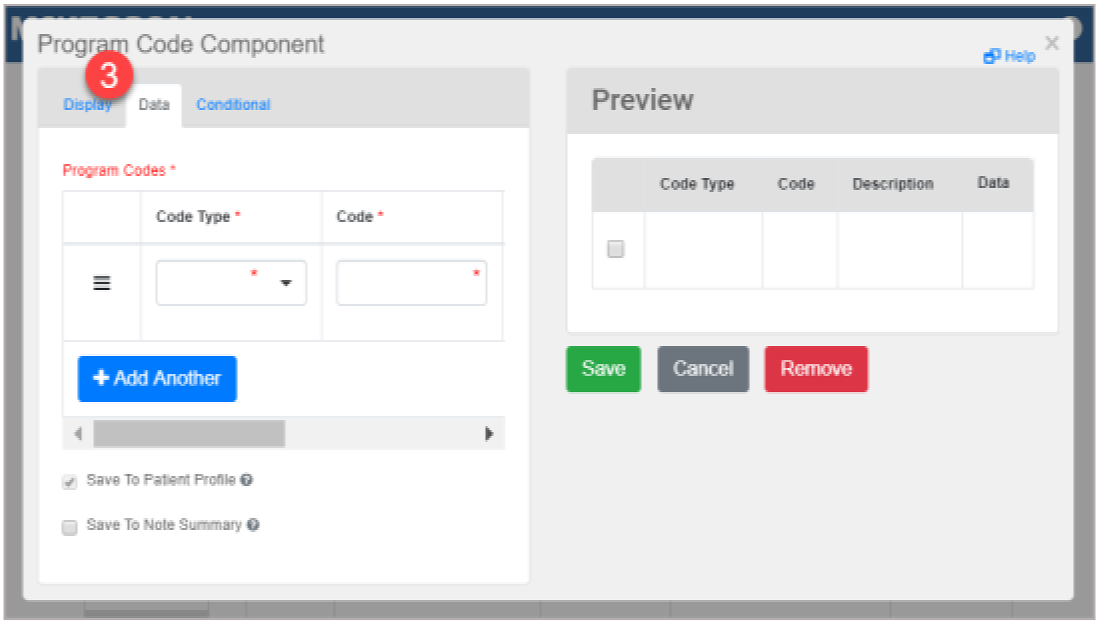


1. Under the **Clinical** options, select **Program Codes** and drag and drop to the questionnaire.

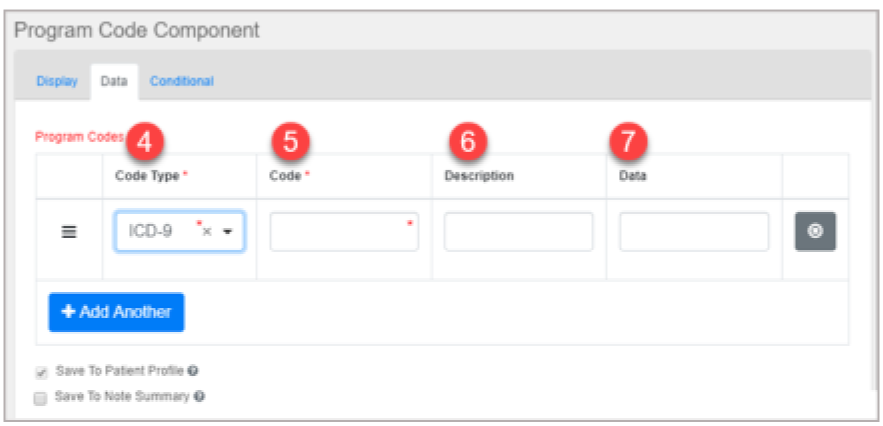


2. On the **Display** tab enter the details for the component in the following:

- **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.

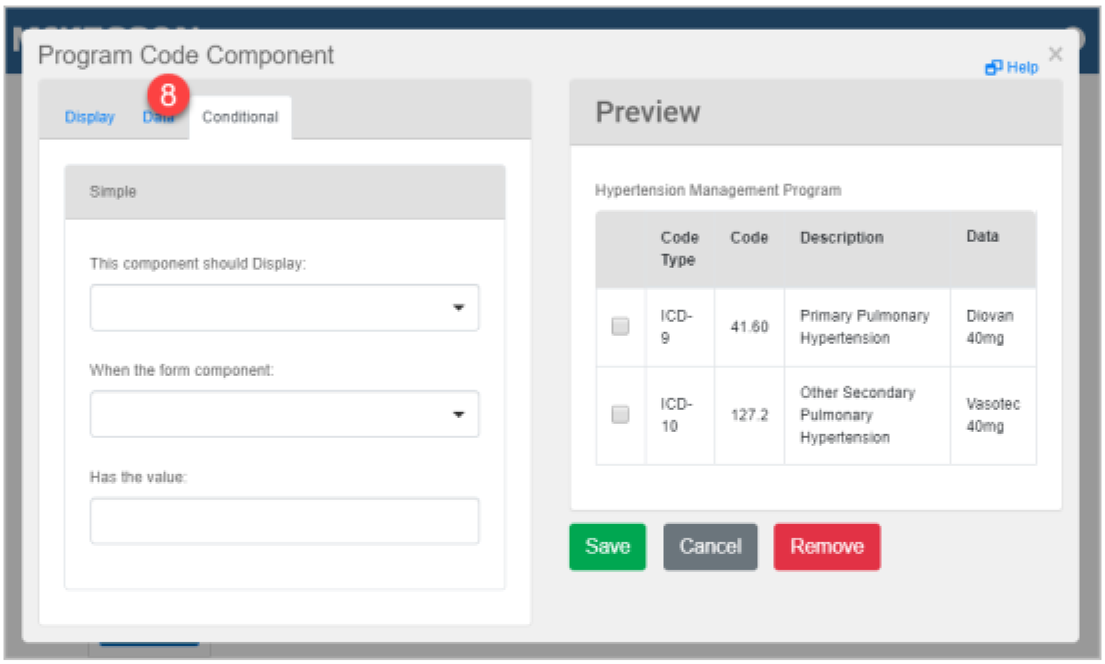


4. Choose whether the code is an **ICD-9**, **ICD-10** or **Custom Code** in the **Code Type** drop-down.
5. Enter the code in the **Code** field.

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

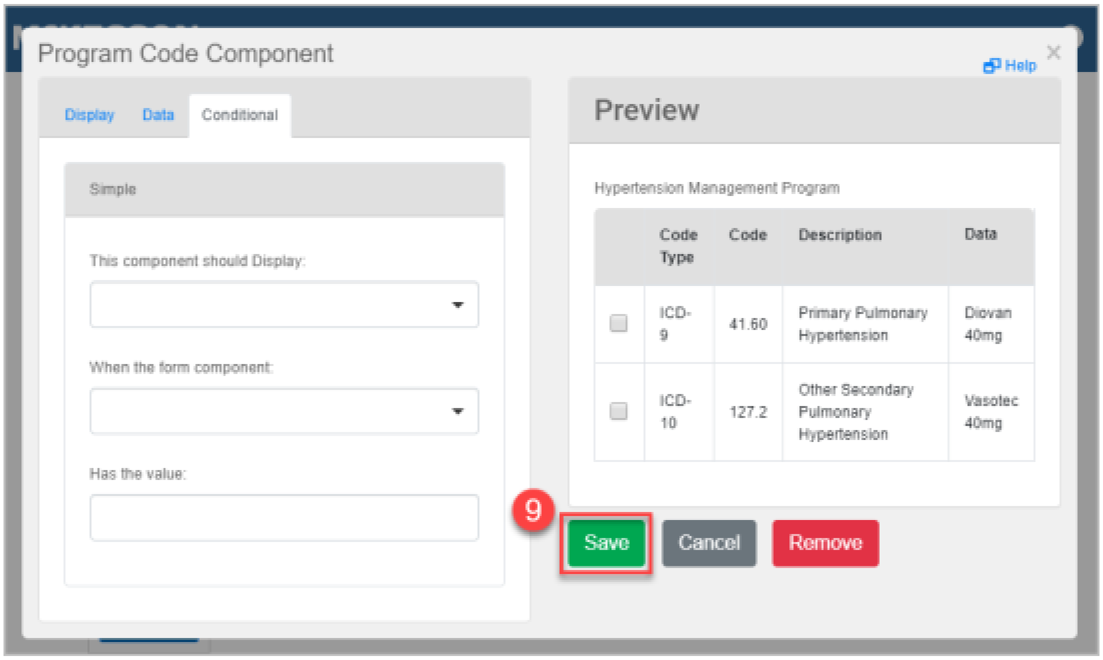
> in many scenarios, therefor to identify patient who completed diabetes counseling, an example of a unique code maybe Complete_Diabetes. This unique code can be used in the Data Filters for the Program to block message generation for the same patient or to identify the patient as a candidate for Alerts 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.
     - Selecting **True** will display the component when the conditional statement is met.
     - Selecting **False** will initially display the component and when the conditional statement is met, the component will be hidden.
   - **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.

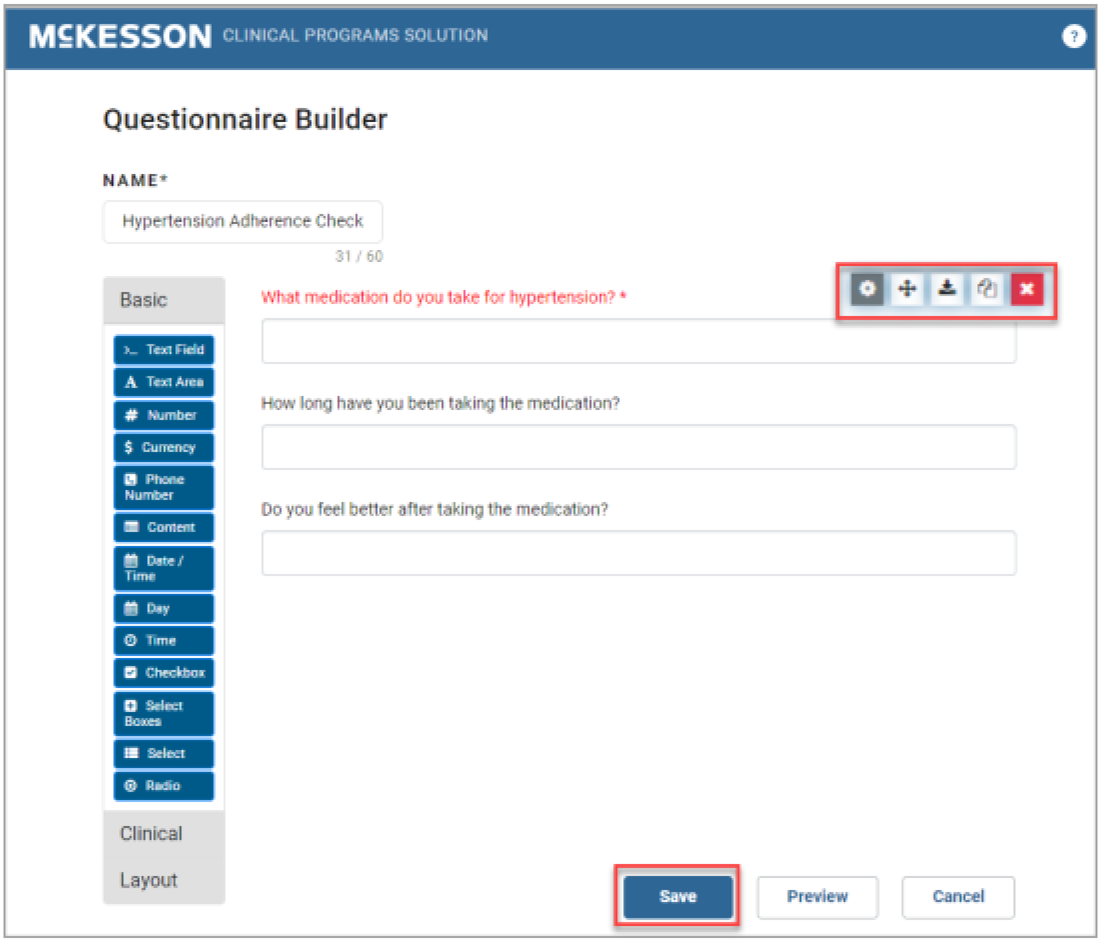


9. Once the **Program Code** component has been configured, select the **Save** button and the system will return to the **Questionnaire Builder** window.

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.

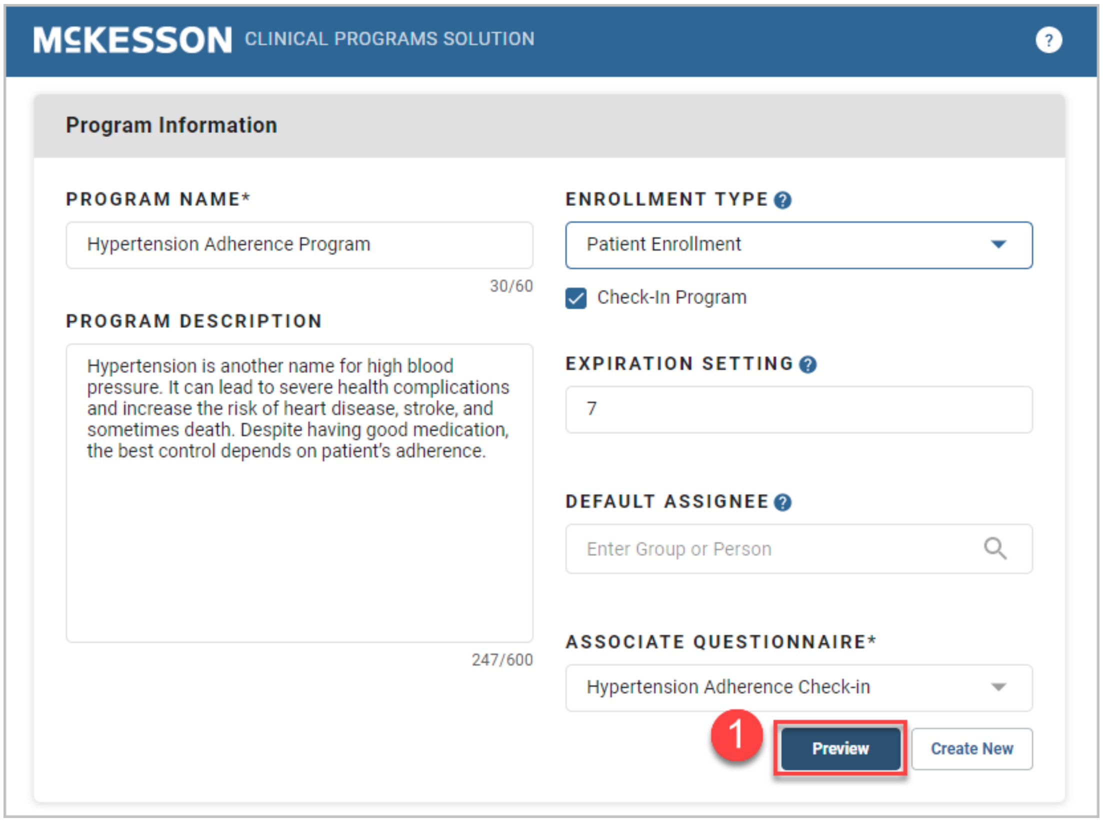
Remove: Select the **Remove** icon ( ) and the component is removed.

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

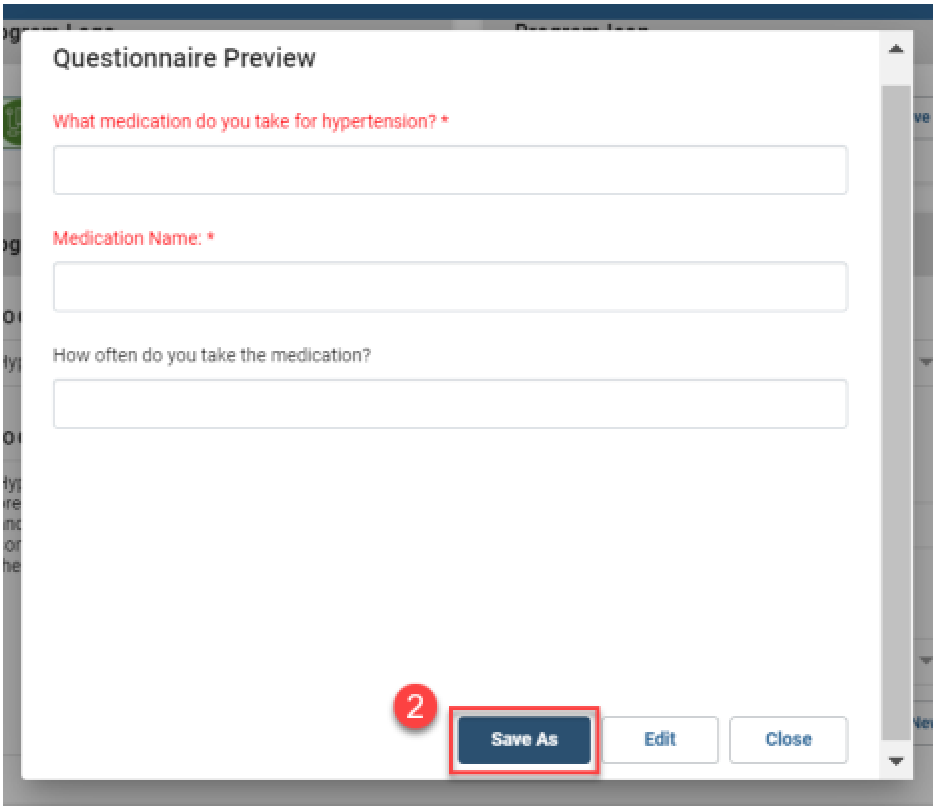
Important:
If the questionnaire is edited, the questionnaire will be updated for any Program Alert or Program that also has that questionnaire associated to it.

Saving a New Questionnaire from an Existing Questionnaire

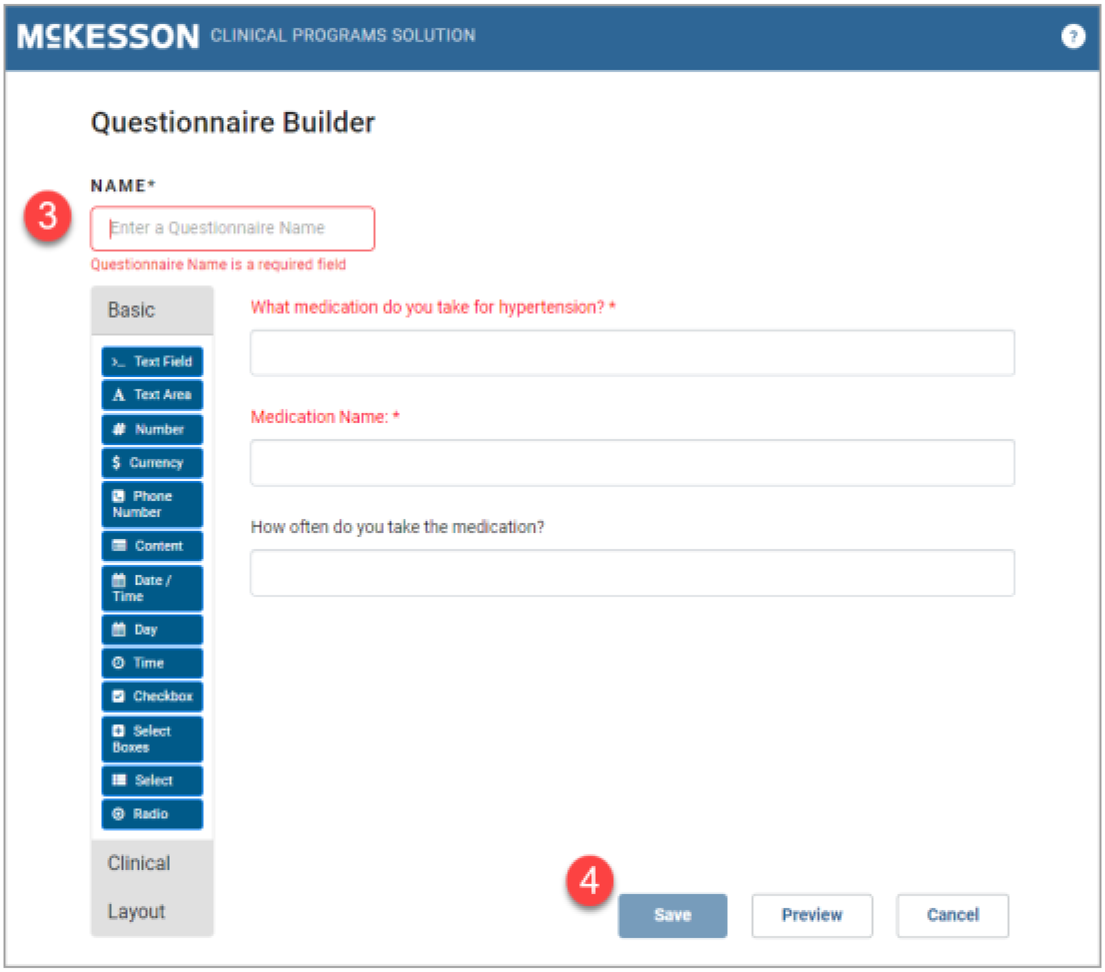
After a questionnaire has been built, you have the ability to do a **Save As** and save the questionnaire with a new name.



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



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

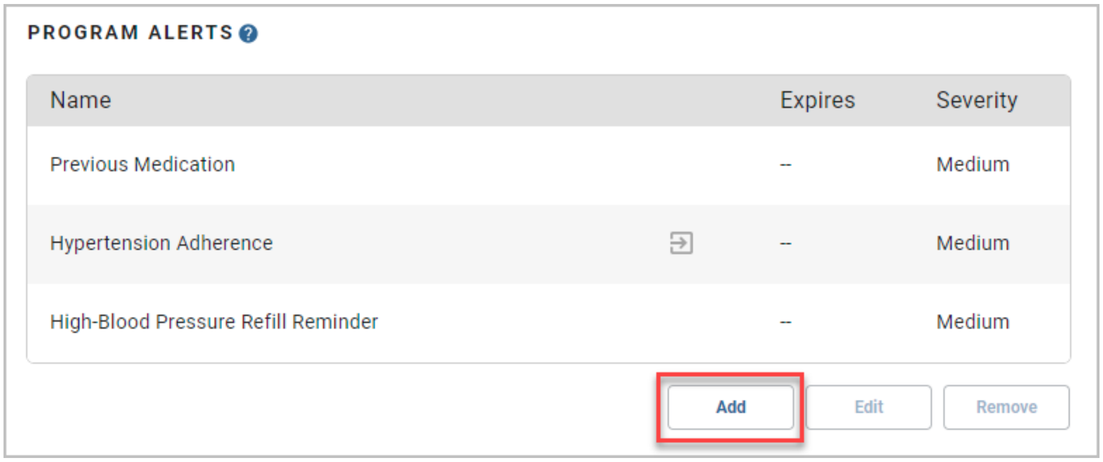


3. Enter a questionnaire **Name**. Once a **Name** is entered the **Save** button becomes active.
4. Once the updates are made to the questionnaire, select the **Save** button.

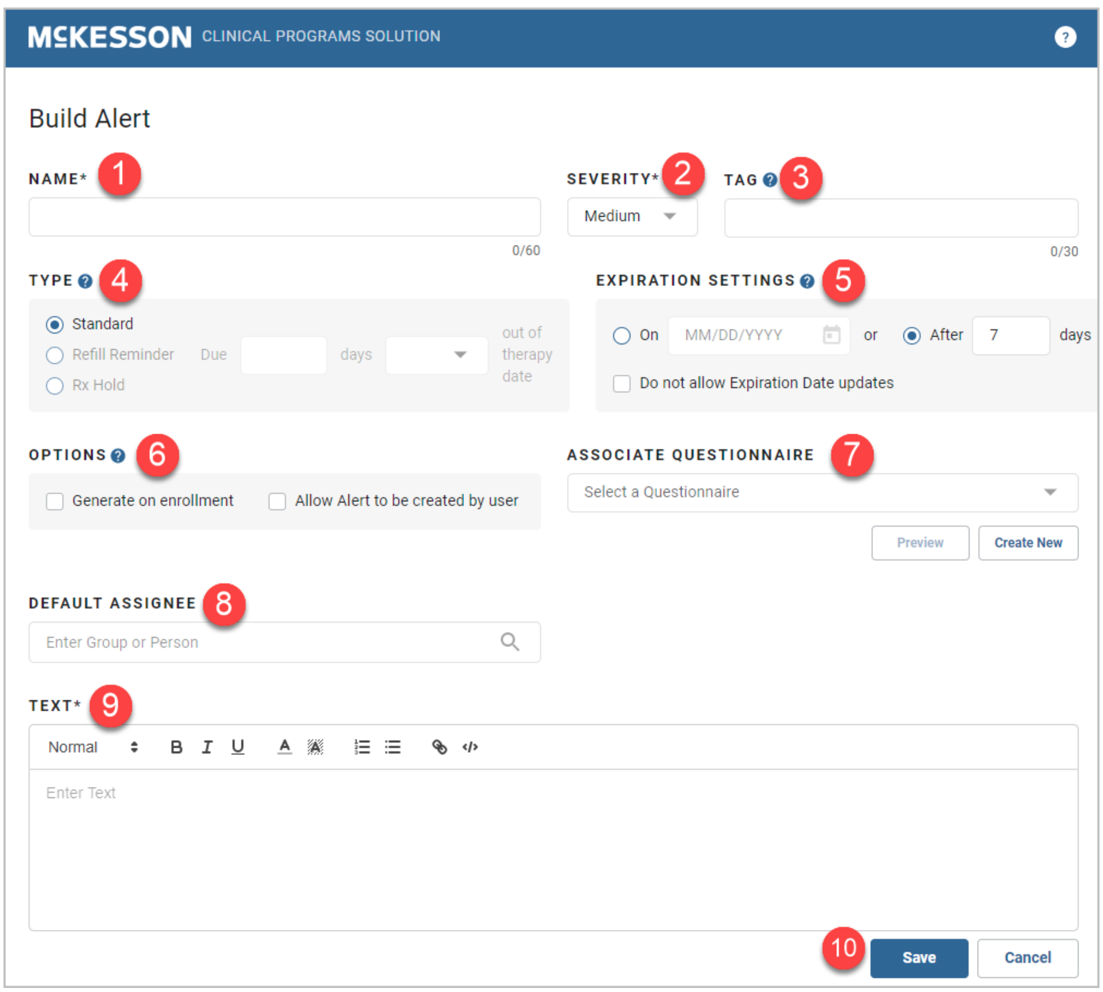
For more information on building questionnaires please refer to "Building Questionnaires" on page 24 and for additional information on modifying questionnaires refer to "Modifying Questionnaires" on page 39.

Building Program Alerts

Program Alerts can be configured to display within workflow or generated by a user to prompt a patient interaction, such as to provide counseling on dosing to the patient or gather patient 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 **Type** of Alert to one of the following:

   - Select the **Standard** option for a basic Alert.

   - Select the **Refill Reminder** option for a Refill Reminder Alert. Next, enter the number of days either before or after the patient's out of therapy days to set the default **Due** date for this Alert.

     The calculation for determining the patient's out of therapy date is as follows:

     - Rx Start date + therapy days >> if either field is null then
     - Rx Start date + days supply >> if either field is null then
     - Delivery date + therapy days >> if either field is null then
     - Delivery date + days supply >> if either field is null then
     - Sold date + therapy days >> if therapy days is null then
     - Sold date + days supply

     In addition, Refill Reminder Alerts are generated based on Data Filter configuration when Rxs have a 'Sold' status within your pharmacy management system. Please refer to "Configuring Clinical Programs" on page 52, for more information on how to configure the Data Filters.

- Select the **Rx Hold** option for an Rx Hold Alert. This option is only available for Programs with an **Enrollment Type** of **No Enrollment**. When this option is selected and an Rx Hold Alert is generated, this will hold the associated Rx fill from advancing in workflow until the Alert is resolved. A pharmacy may want to hold an Rx to require documentation prior to a prescription advancing in your pharmacy workflow. The Rx will be held until the questionnaire is completed and the Alert is resolved. Also, this type of Alert does not have an expiration and the **Expiration Settings** in step 5 are grayed out.

  Rx Hold Alerts can be configured using Data Filters. For example, you can select to generate the Alert on entry to either Reception, Data Entry, Pre-Verification 1, or Pre-Verification 2. Please refer to "Configuring Clinical Programs" on page 52, for more information on how to configure the Data Filters.

> **Important:**
> The **Refill Reminder** Alert and **Rx Hold** Alert options are only available with the EnterpriseRx Specialty Solution (ESS). Please contact your Account Executive for more information.

5. 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.
6. Select one or both of the following **Options**:
   - **Generate On Enrollment** checkbox if you want this Alert to automatically generate and display in the **Clinical App** and **Alert Queue** upon patient enrollment. Any number of Alerts can be set to generate on enrollment for a given Self-Directed Program.
   - **Allow Alert to be created by user** checkbox to allow a user to create an Alert when needed, from the **Clinical App** using this Alert as a starting point.

> **Important:**
> These options are not available for **Refill Reminder** Alerts.

> **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.

7. 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 24 and for additional information on modifying questionnaires refer to "Modifying Questionnaires" on page 39.
8. In the **Default 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. Setting a **Default Assignee** is optional, and if one is selected for the Alert, when the Alert is generated for the patient the assignee is already defined.

   For more information on creating Groups, please refer to "CPS Groups" on page 207.
9. 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, described below.

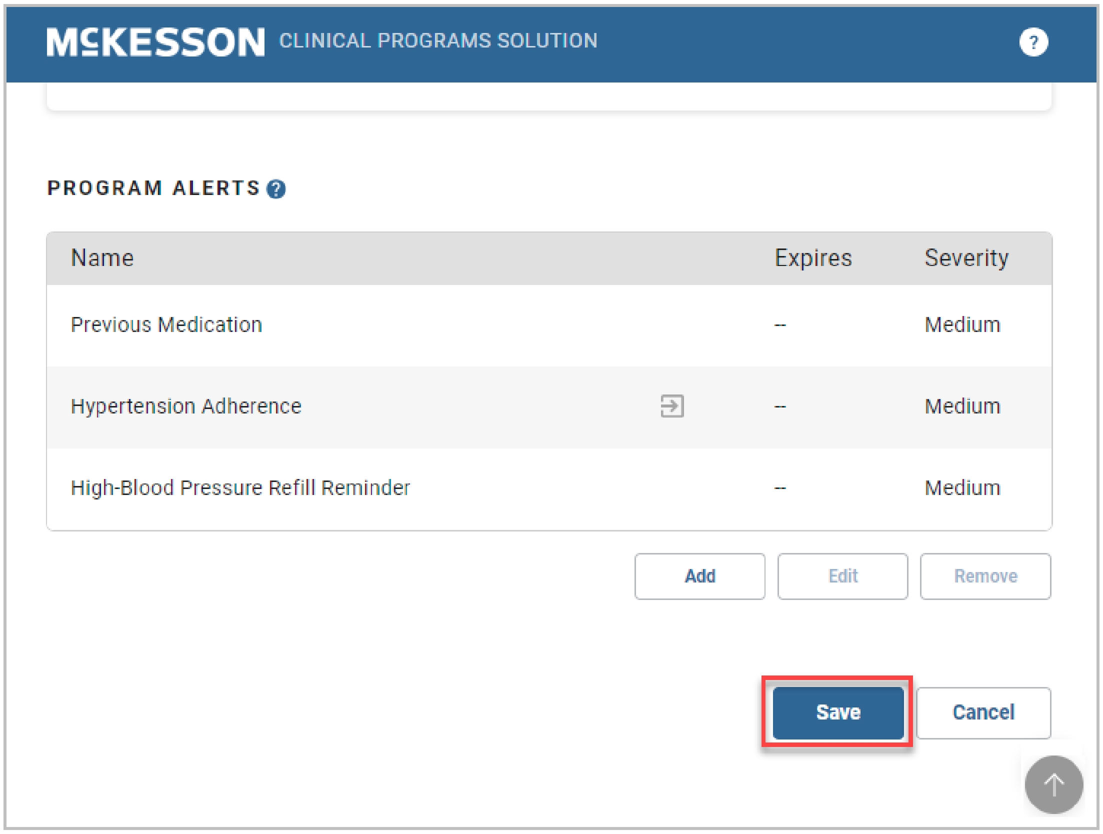
Text Field Formatting Options	
Text Size	Select this button (Normal) to adjust the text size. You can select either **Small**, **Normal**, **Large**, or **Huge**. **Normal** is the default text size.
Bold Text	Select this button (B) to make the text bold.
Italic Text	Select this button (I) to make the text italic.
Underlined Text	Select this button (U) to underline the text.
Text Color	Select this button (A) to change the color of the text. The default color is black.
Text Background	Select this button (A) to change the background color of the text. The default color is white.
Text Numbering	Use this button ( ) to apply numbering to the text.

Text Field Formatting Options	
Text Bullets	Use this button ( ) to apply bullets to the text.
Hyperlinks	Hyperlinks can be built into a Program Alert, to provide pharmacy staff quick access to a specific external site. All Alert hyperlinks will open in the default browser. First enter the text you want to display for the hyperlink, highlight the text and then select the **Hyperlink** button ( ). Input the desired URL address in the **Enter link** field and select the **Save** button.
Custom Fields	Used in conjunction with the Bulk Alert feature to generate Alerts for a specified list of patients. And used on ad hoc Alerts when Custom Fields are specified. Select this button ( ) to include Custom Fields in an Alert's text. Note that the text entered between the pre-built parentheses will be the name of the field that displays in the Bulk Alert input list and the **Add Alert** window for pharmacy staff. For more information on adding the Custom Fields to a Bulk Alert, please refer to the section on "Bulk Alert" on page 76.

10. 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 "Activating Self-Directed Programs" on page 50.

Chapter 3: Activating Self-Directed Programs

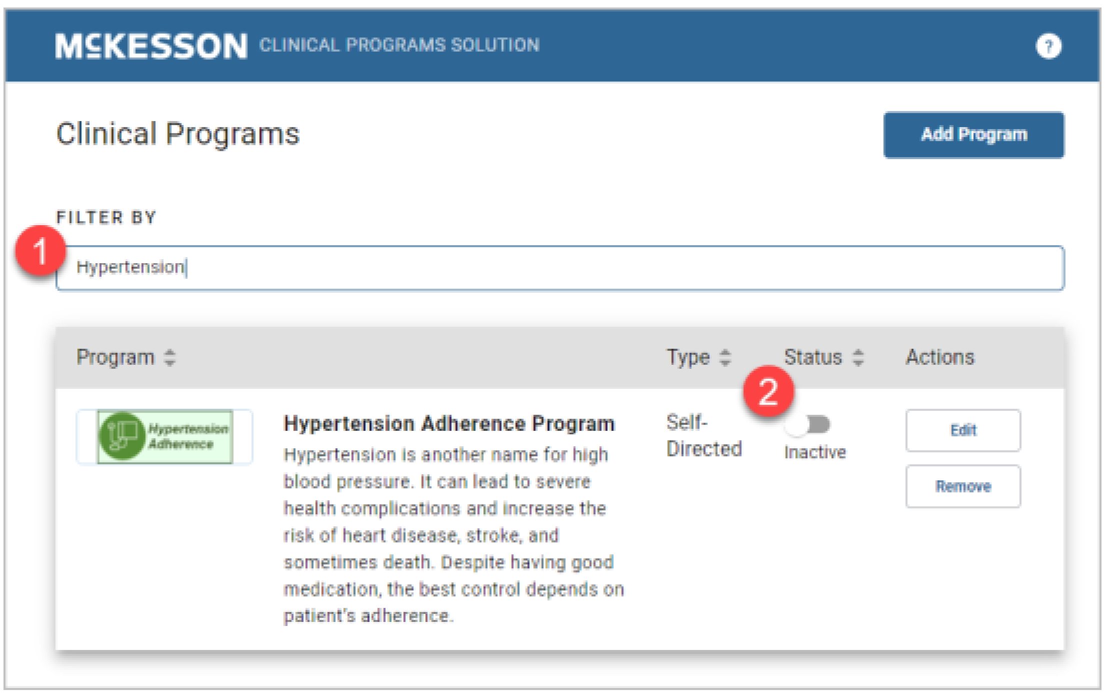
After building a Self-Directed Program, the next step is to activate it.

Steps to Activating Self-Directed Programs

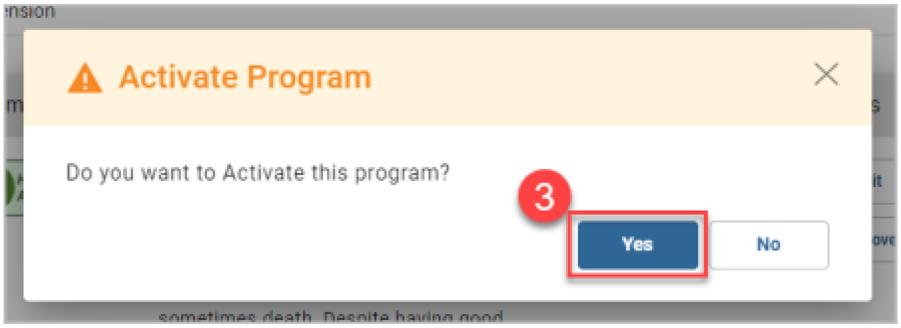
- "Activating Self-Directed Programs" below

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 "Configuring Clinical Programs" on page 52 to continue.

Chapter 4: 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.

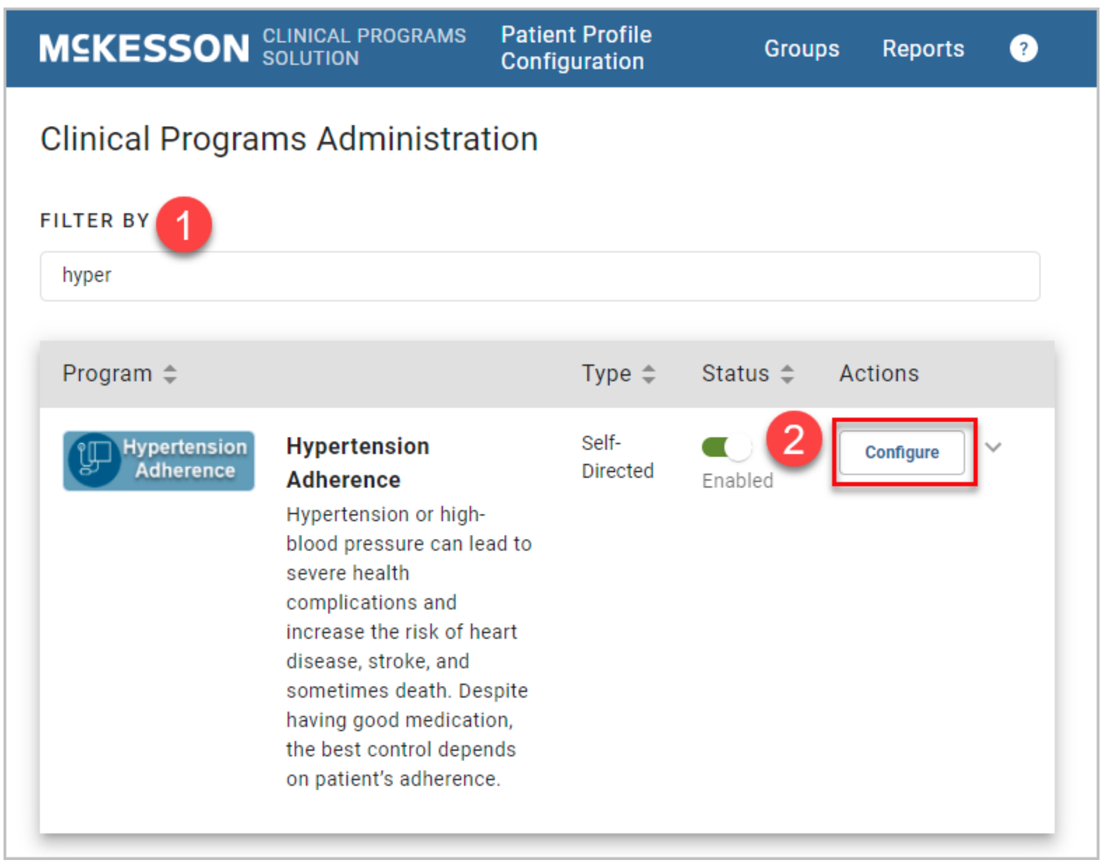
Tasks in Configuring Clinical Programs

Getting Started with Program Configuration

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.)

For entries in the value field:

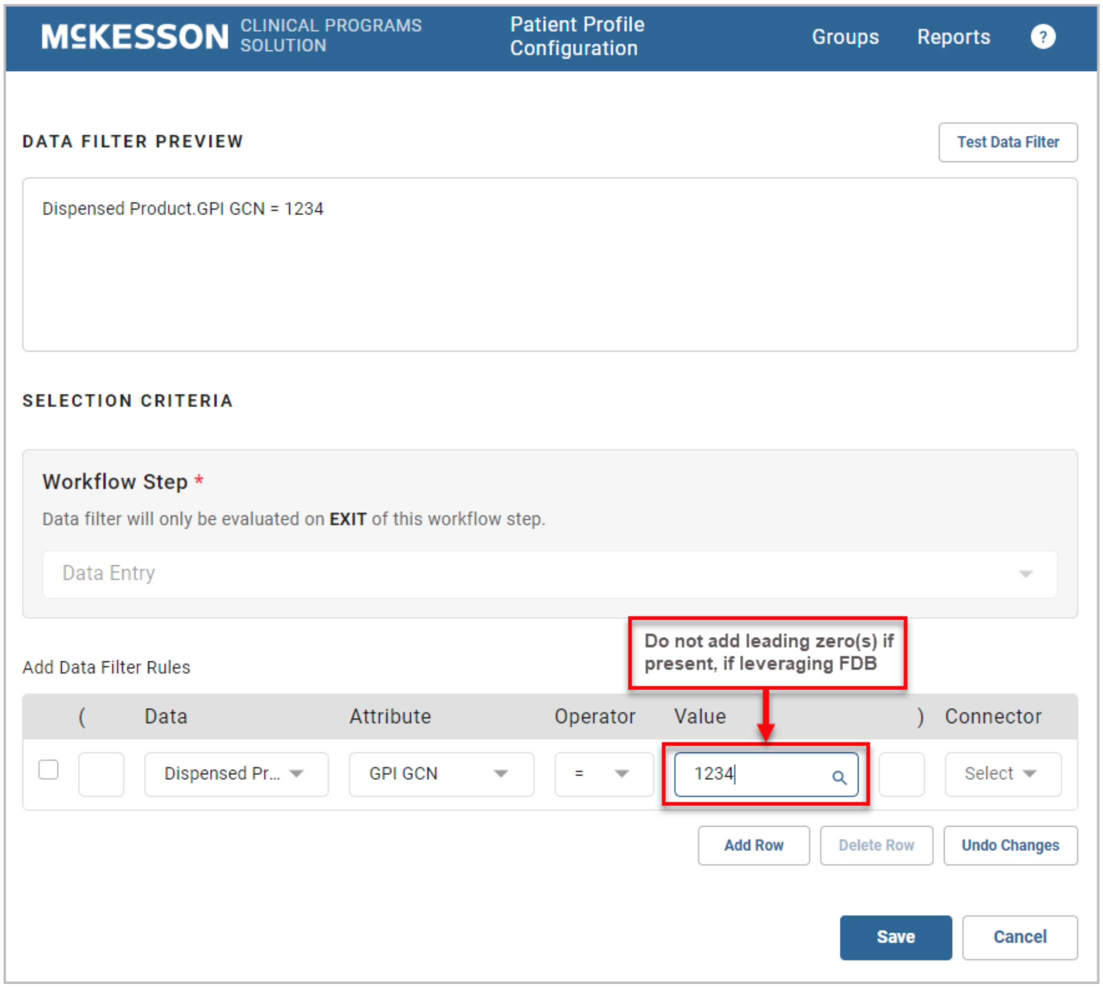
- Text/name entries in the Value field are case sensitive. For example: a filter is created so that the written product name starts with “dio.” If the product selected is Diovan, the filter will not match.

- 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.

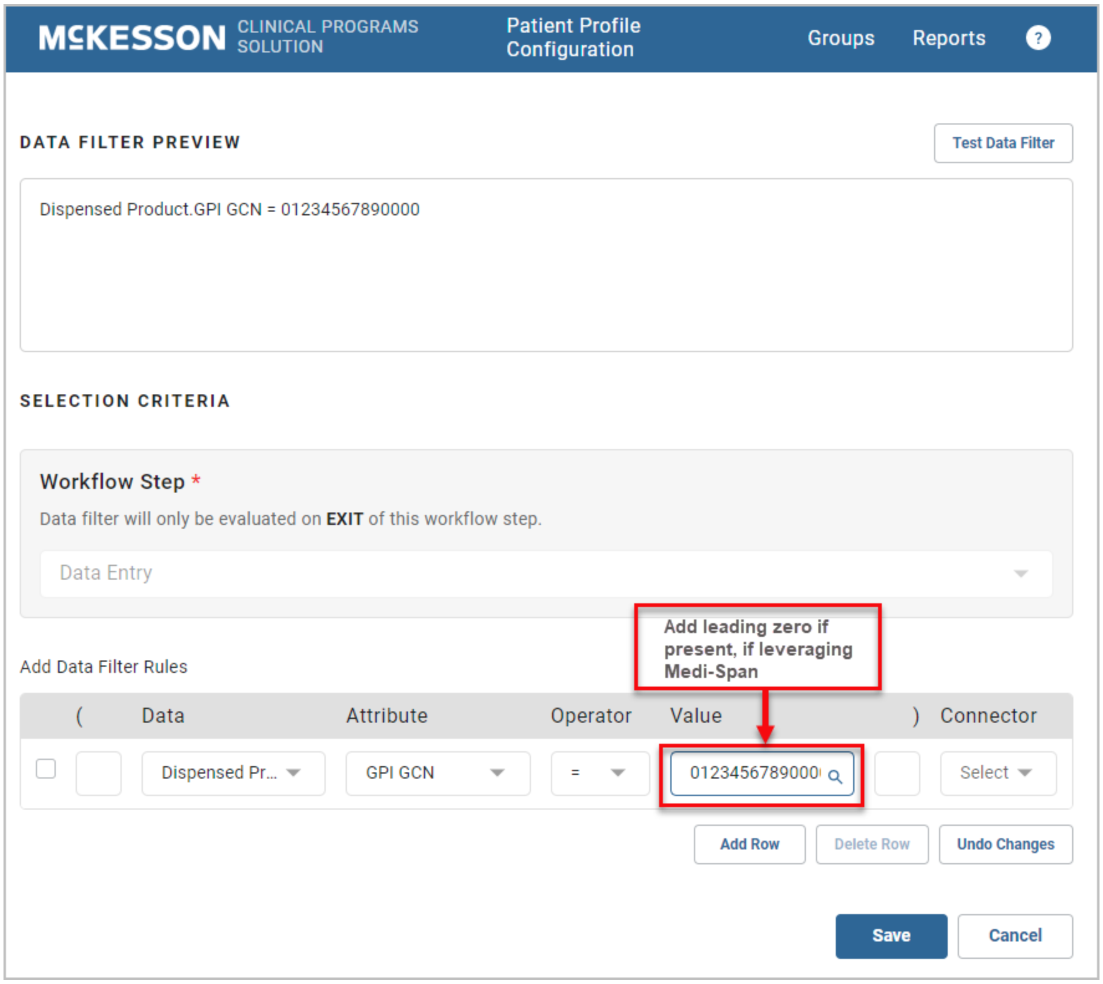
Tip:
For Self-Directed Programs, you'll be making your own decisions on what your filters include. Below is an example of a simple filter and a couple of more complex filters to give you an illustration of some of the different options available.

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)

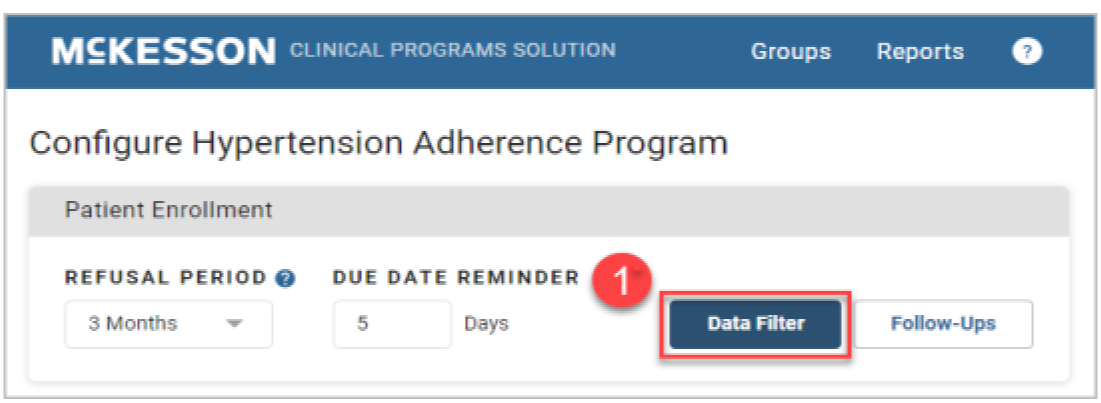


Example Data Filter for Medi-Span

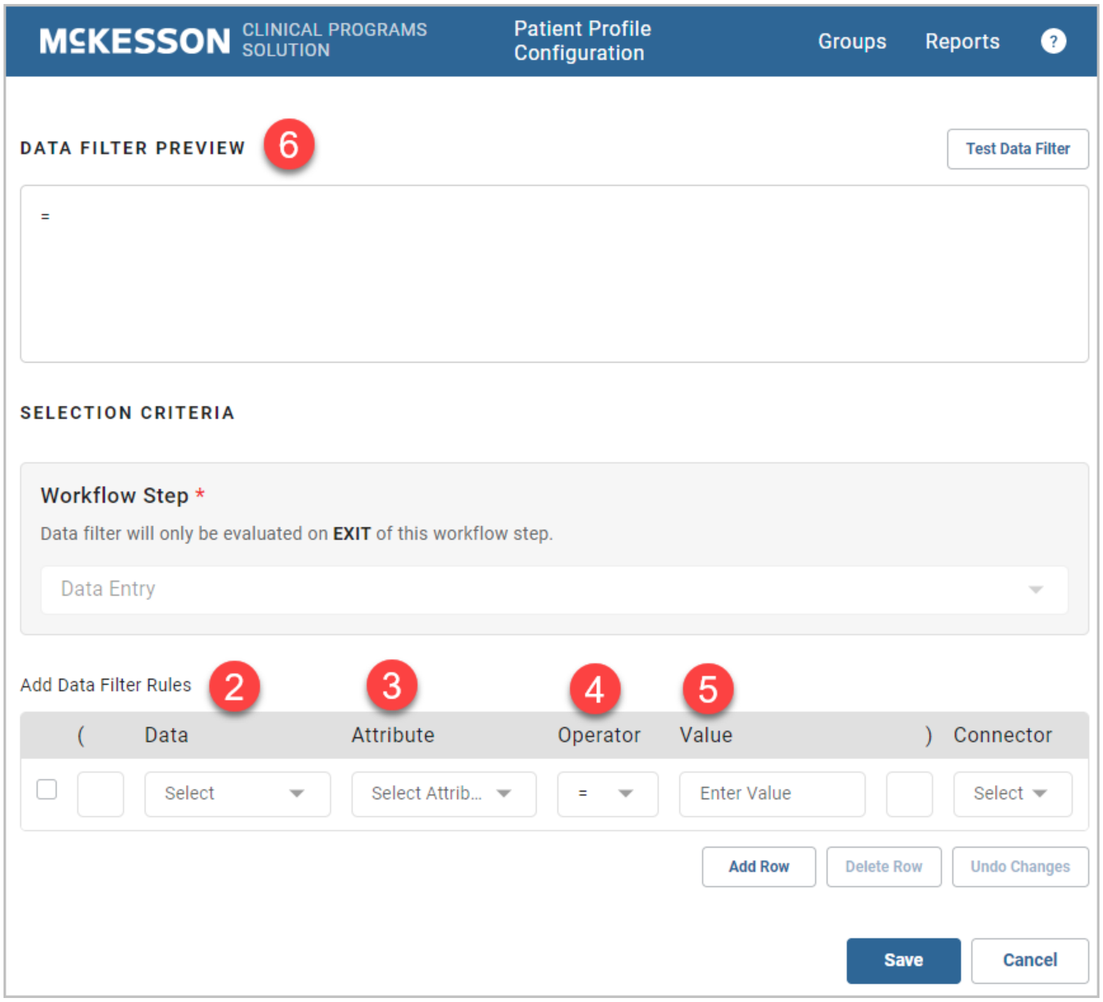


Simple Data Filter Example

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):



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



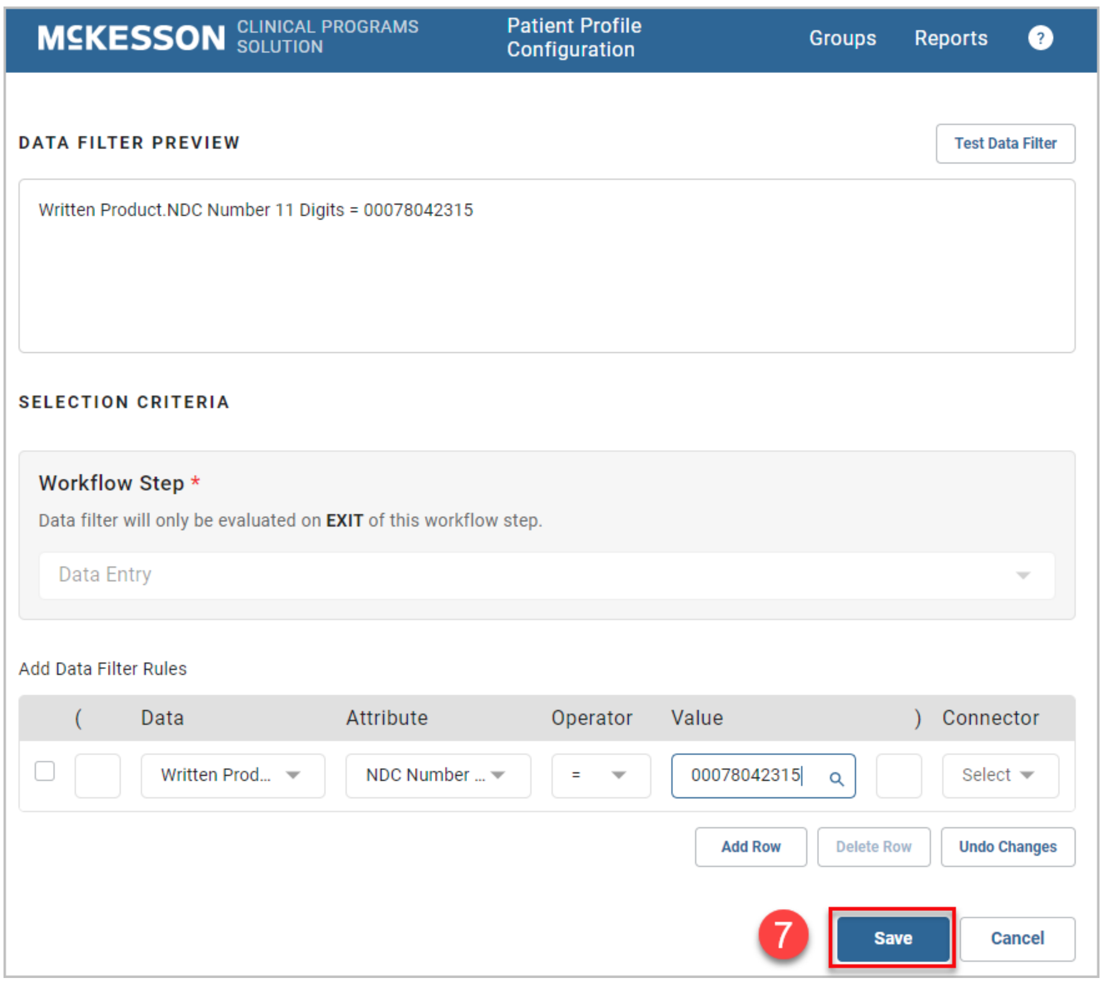
Note:
Selection Criteria will display as disabled for Enrollments Alerts as these Alerts can only be created on exit of the Data Entry workflow step. Please refer to "Setting Up Data Filter, Bulk Alert and Follow-Ups for Program Alerts" on page 73, for more information on **Selection Criteria** for Data Filters for Program Alerts.

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 11 Digits** was used. For more information on available attributes, please refer to "Enrollment and Program Alert Data Filters" on page 304 in the Appendix.

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.



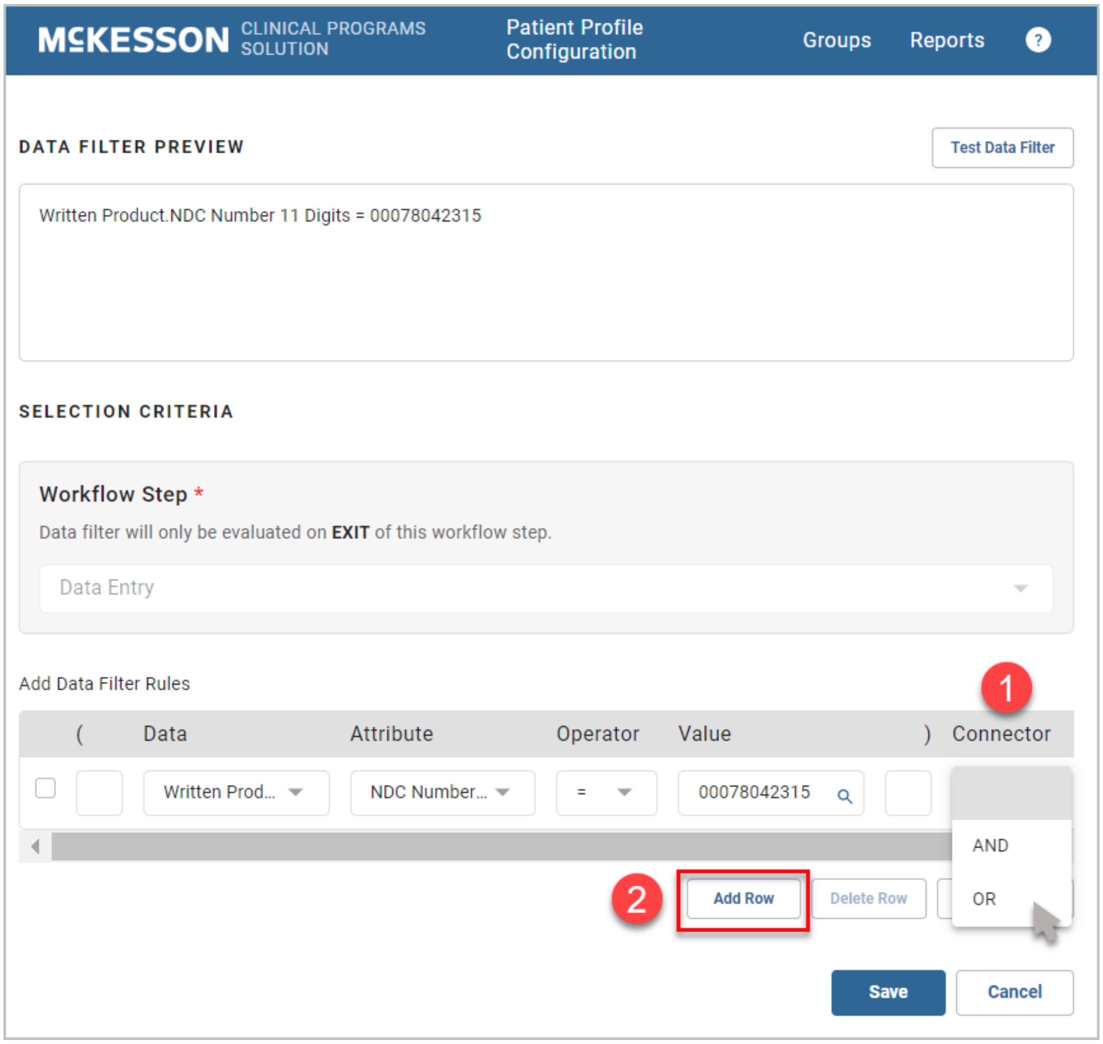
7. If the information entered is correct, select the **Save** button to add the Data Filter.

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

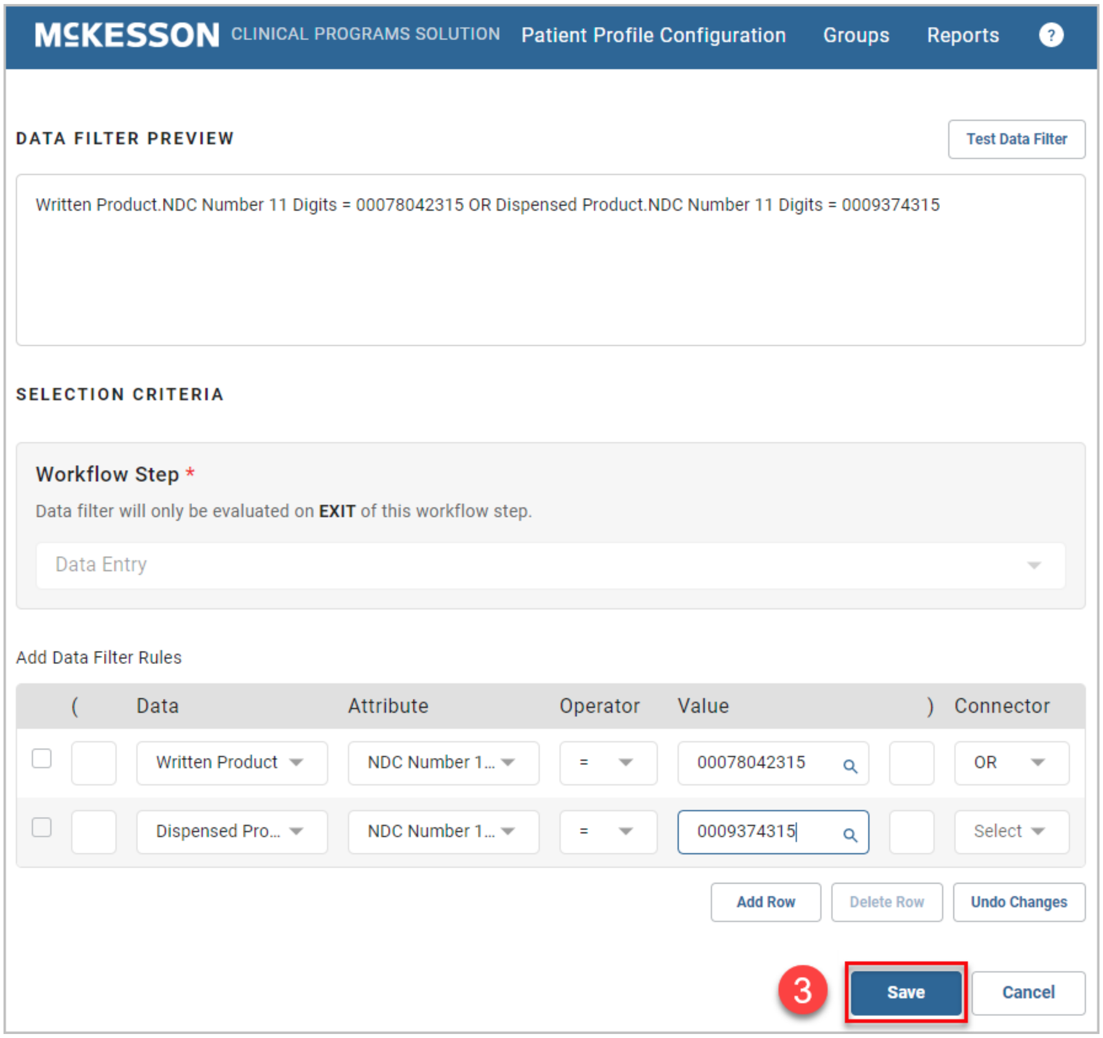
Complex Data Filter Example #1

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:



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" on page 57 instructions above, adding the dispensed product information to the new row.

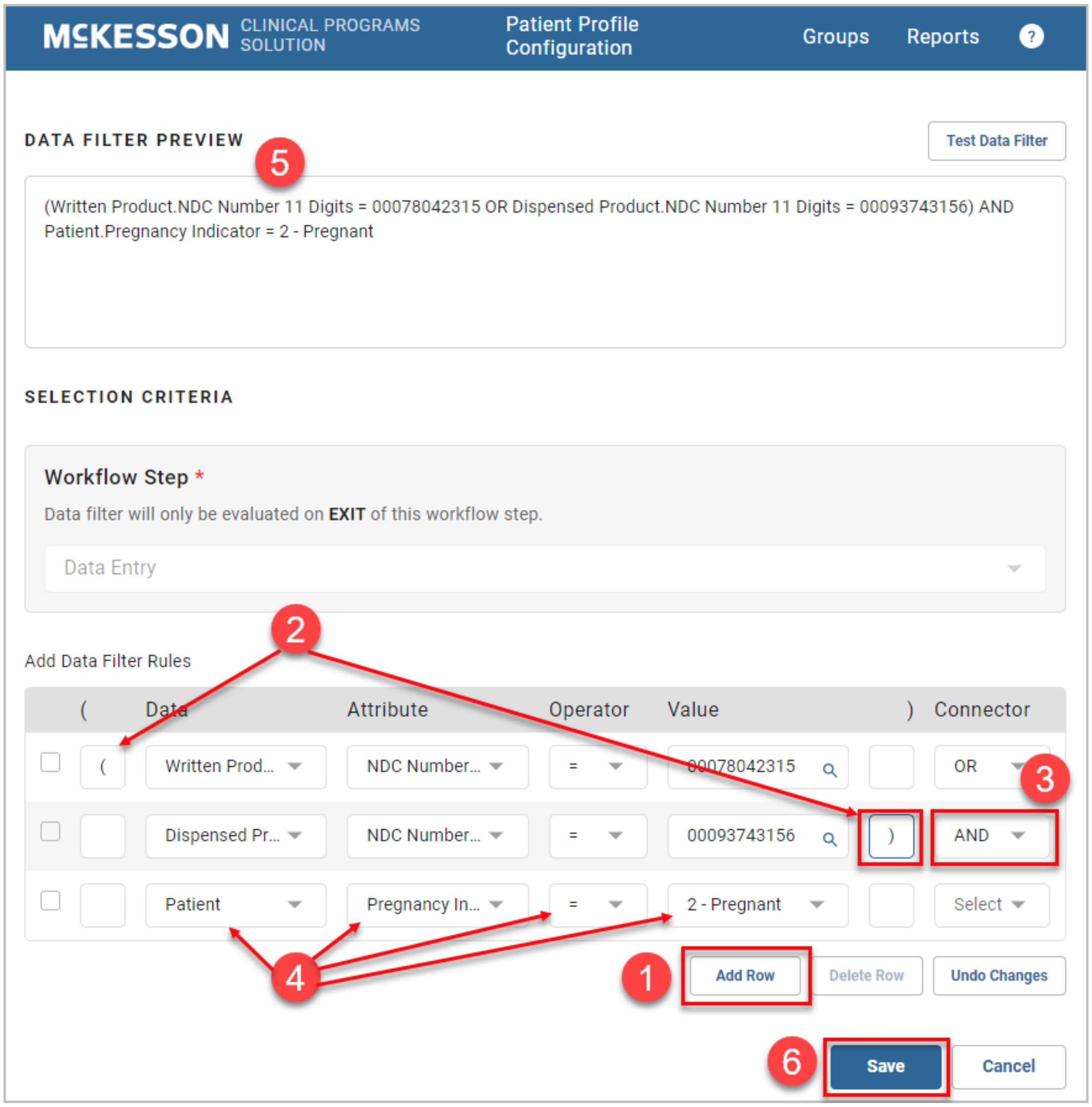


3. Select **Save** to add the Data Filter.

Complex Data Filter Example #2

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

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



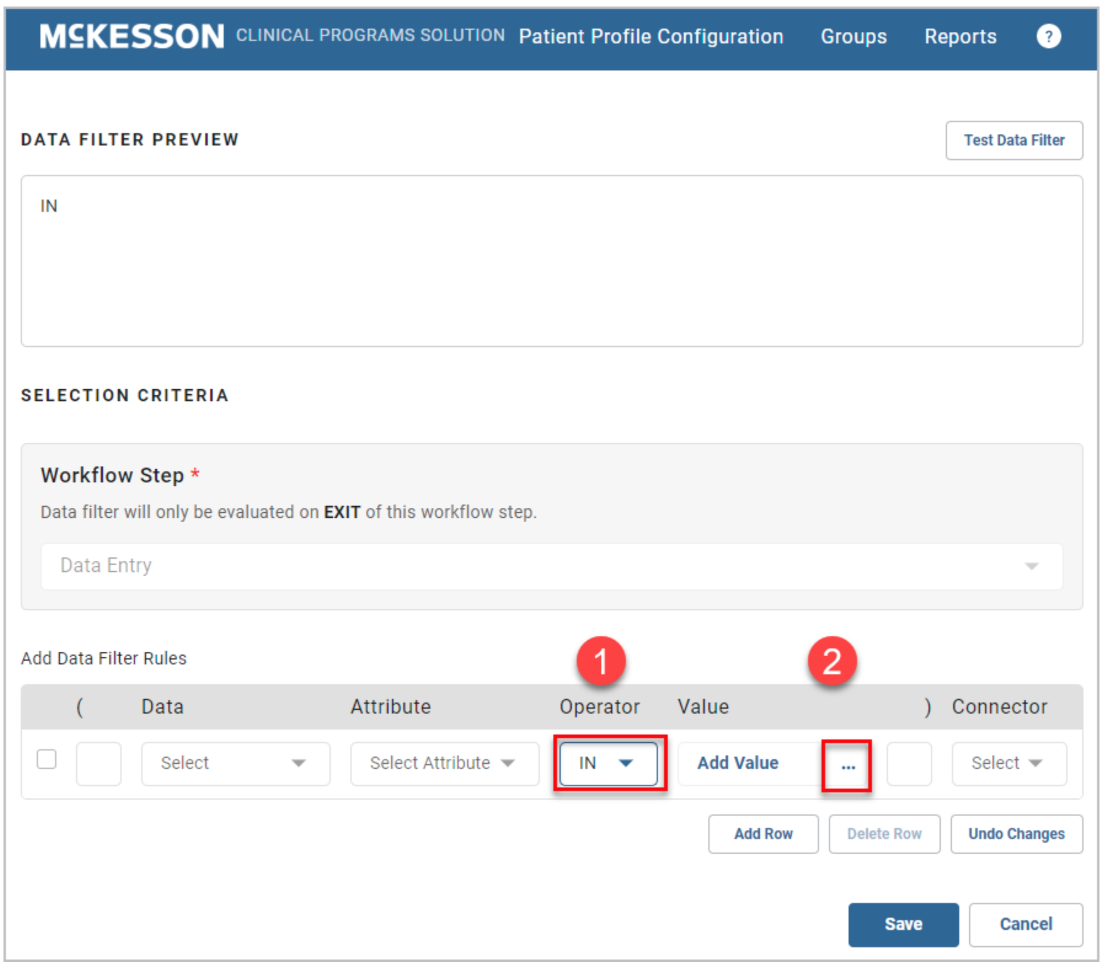
1. Select the **Add Row** button.
2. Insert the open and closed parenthesis as shown in the image above.
3. Select the drop-down for **Connector** and choose **AND**.
4. Insert the row fields with the following:
   - **Patient** in the **Data** field
   - **Pregnancy Indicator** in the **Attribute**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

> **Tip:**
> Use the **Test Data Filter** button at the top of the window to open the **Test Data Filter** window. In the window you can select a patient and validate the Data Filter.

Adding an Array of Values with the IN and NOTIN Operators

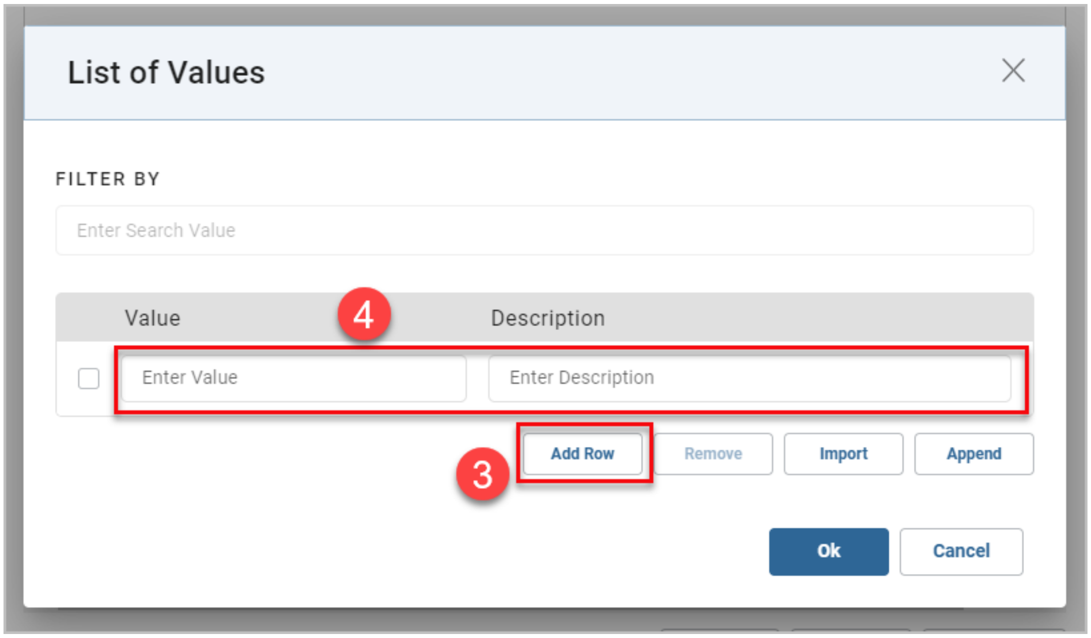
When using the **IN** and **NOTIN** operators in a Data Filter, you can add an array of values by individually adding each value, or you can add multiple values at a time by importing a comma-separated values (CSV) file.



1. Select IN or NOTIN from the **Operator** drop-down.

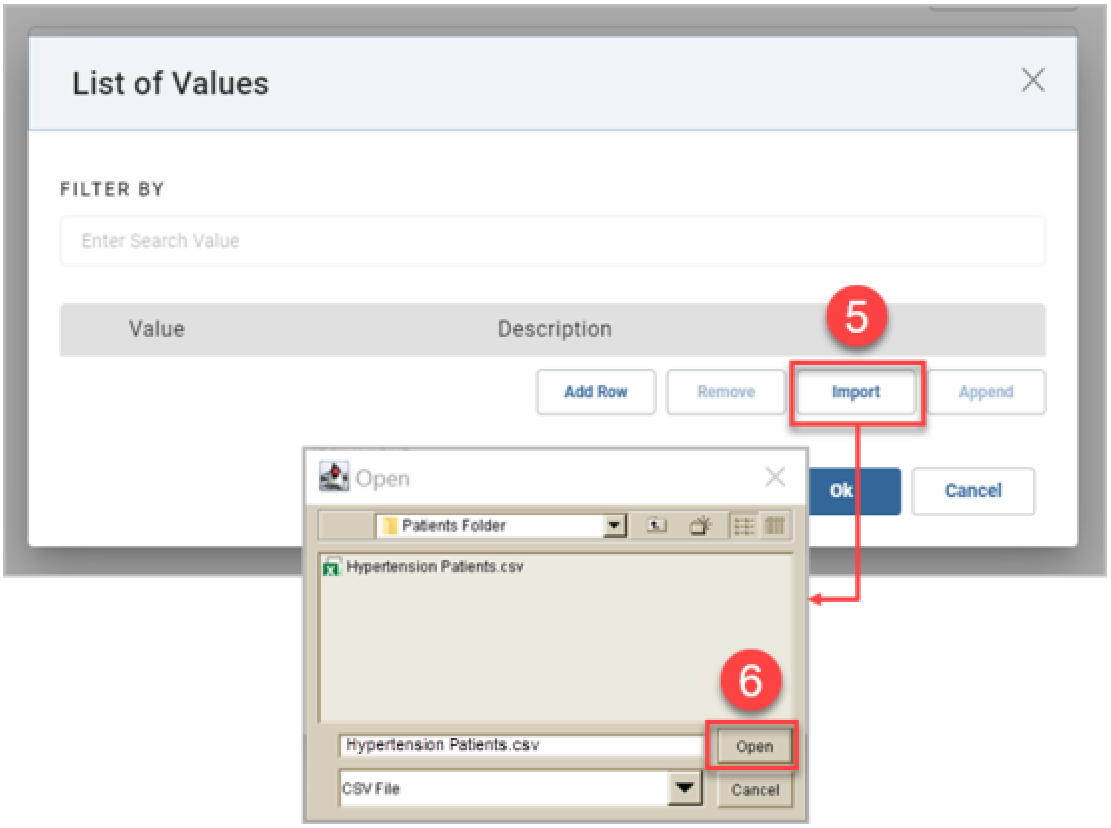
> **Note:**
> The **IN** and **NOTIN** operators do not support the **Age** attribute for the **Patient** data element.

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.

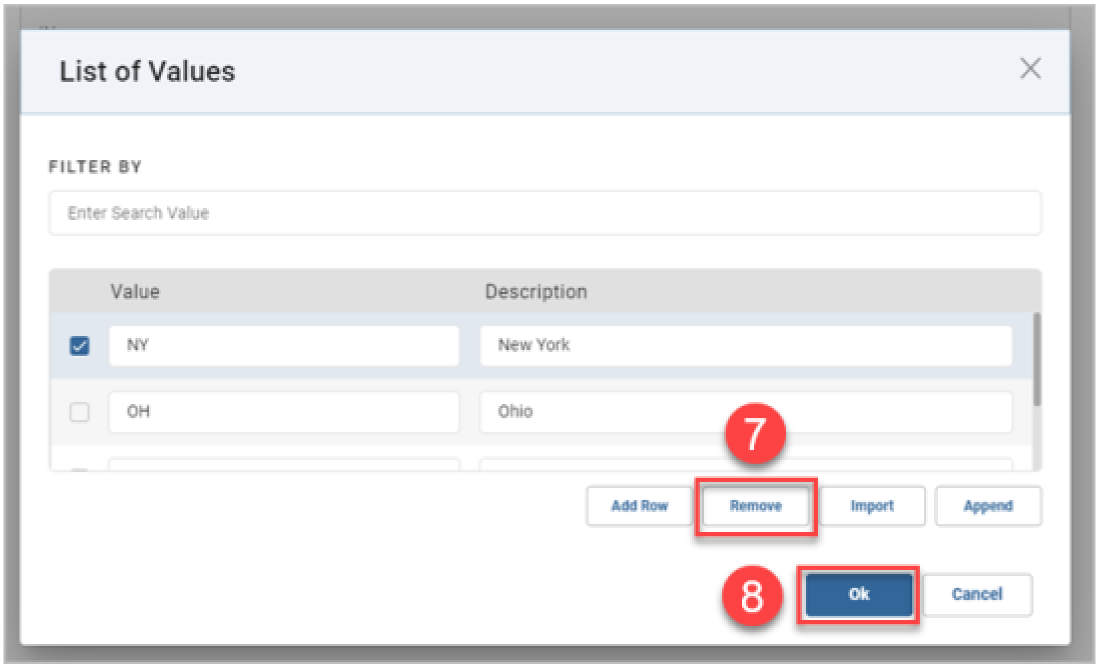


5. To upload multiple values at once using a CSV file, select the **Import** button. Using the **Import** button to import a CSV file will override any existing items in the list. Alternatively, you can use the **Append** button to import a CSV file. Using the **Append** button does not overwrite any 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.



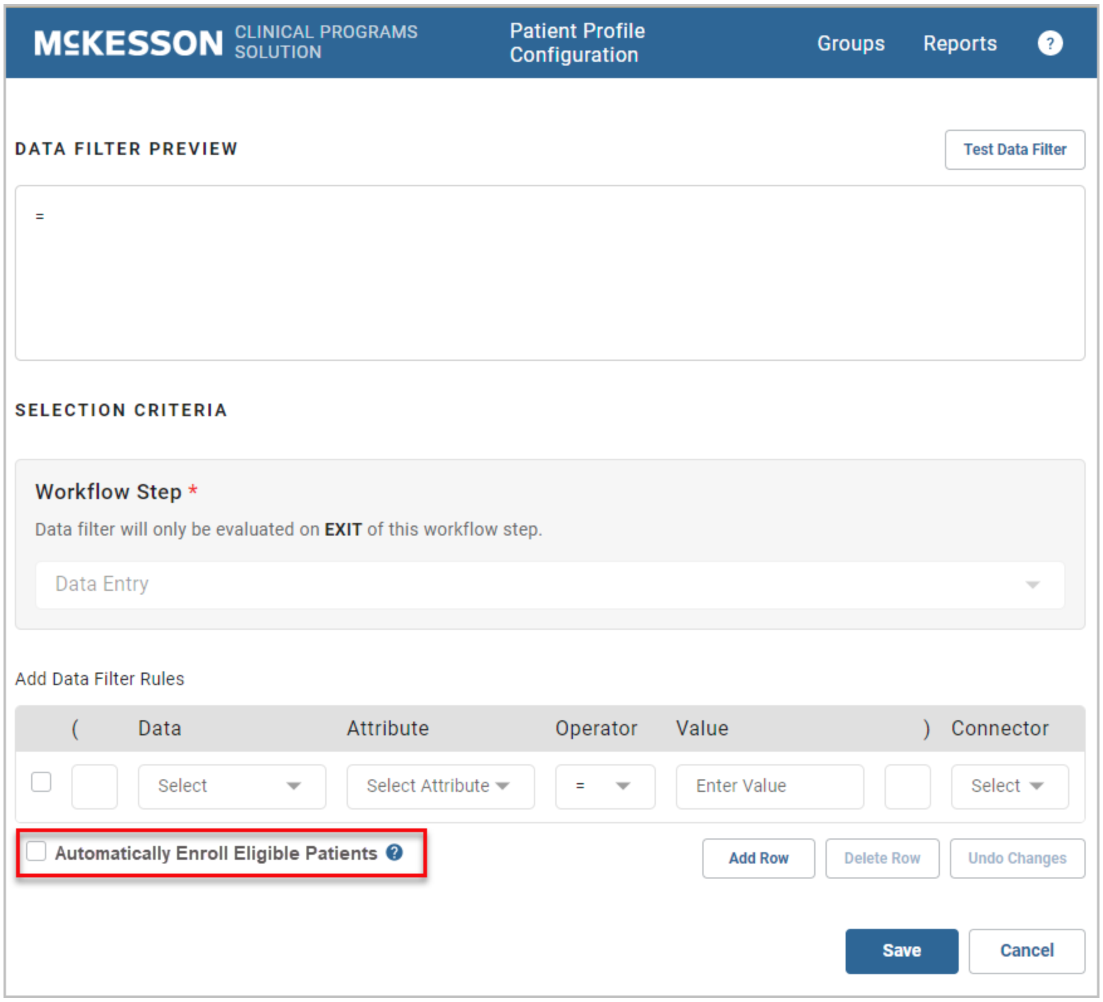
7. To remove an individual item, select the checkbox next to the item and select the **Remove** button.
8. When you are done making changes, select the **Ok** button to return to the previous window.

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" on page 304 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.

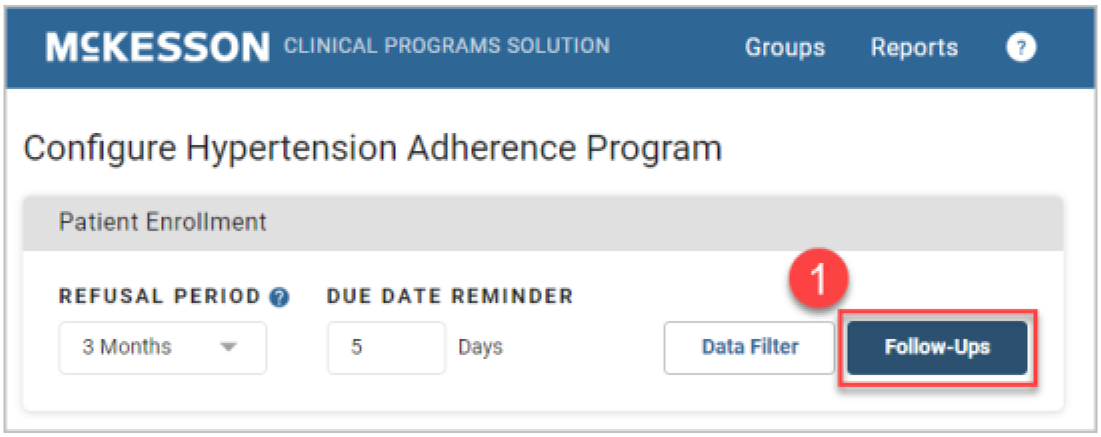


When the criteria have been met and this checkbox is selected, the patient will be automatically enrolled into the Vendor Program and no Patient Enrollment Alert will be created.

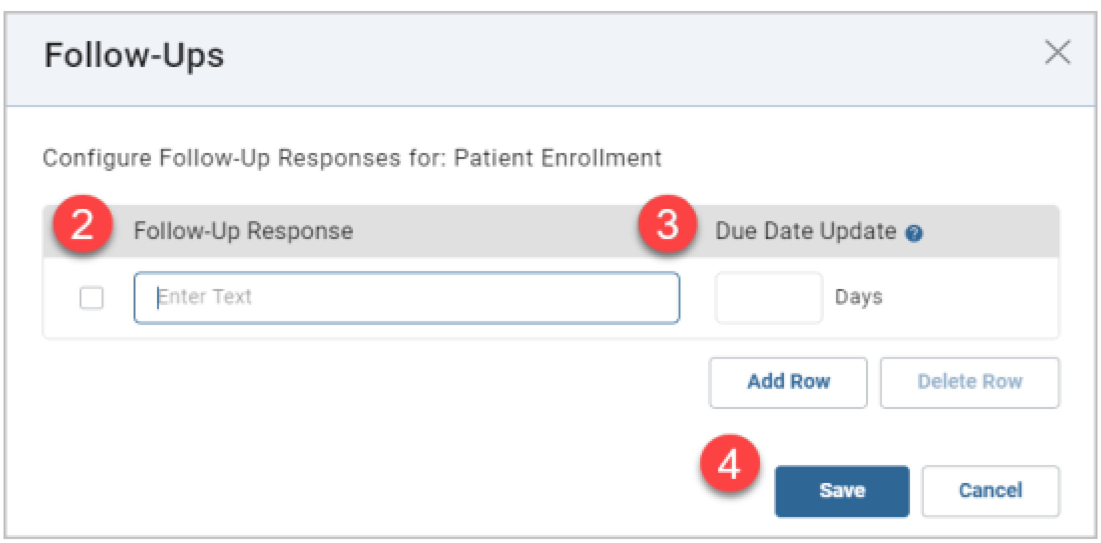
Setting Up Follow-Ups for Program Enrollment

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

Note:
You will only see the **Follow-Ups** 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**).



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

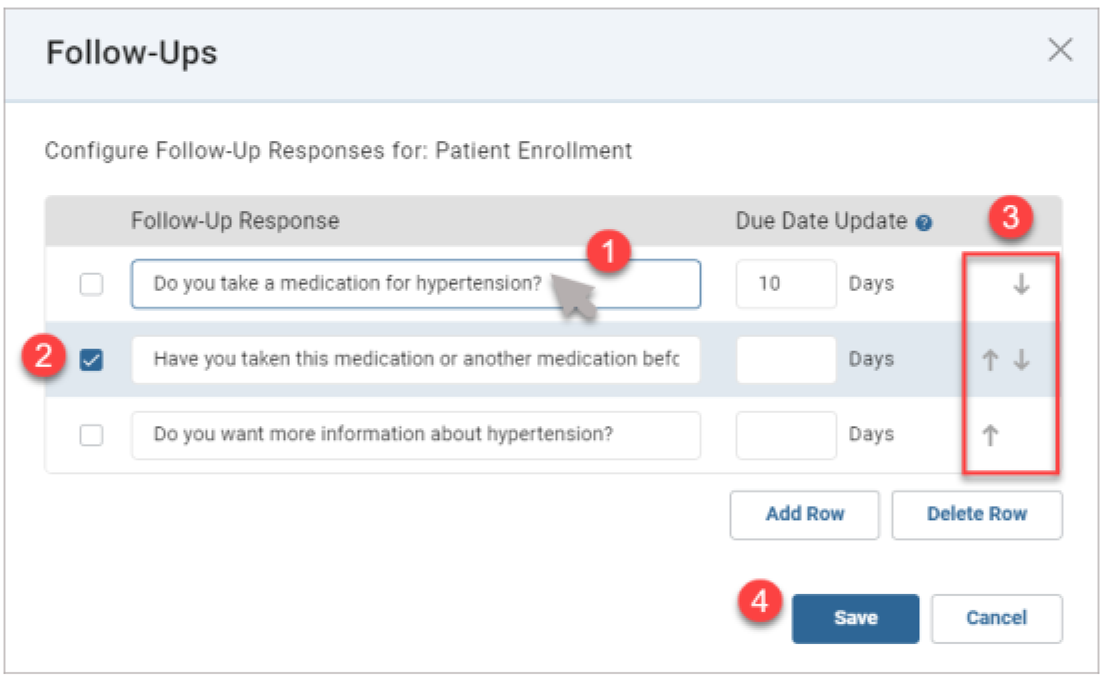


2. In the field enter the text for the **Follow-Up Response**.
3. Enter a **Due Date Update** in days or leave it blank. When this **Follow-Up Response** is selected for an Alert, the Alert's due date is calculated by adding the number of days specified in the **Due Date Update** field to the current 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

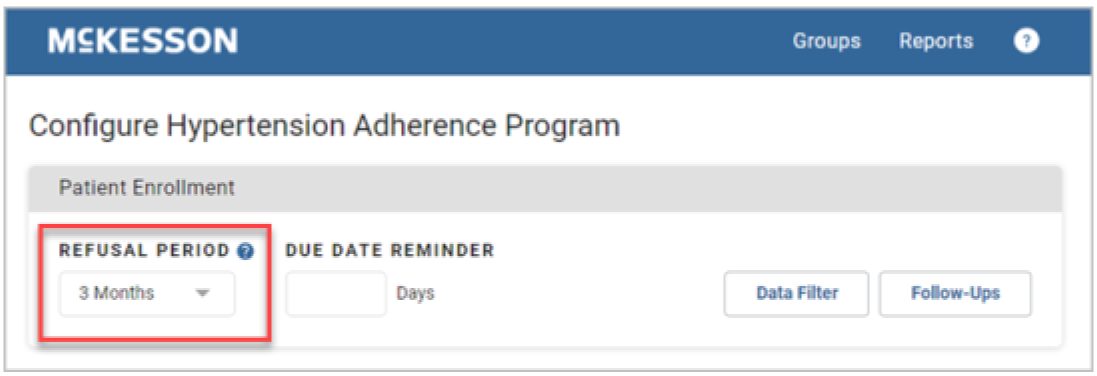


1. Edit a Follow-Up Response by selecting the specific response and editing the text.
2. To delete one or more Follow-Up Responses check the check-box next to the response you want to delete and select the **Delete Row** button.
3. Additionally, you can use the arrows to move the position of a Follow-Up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

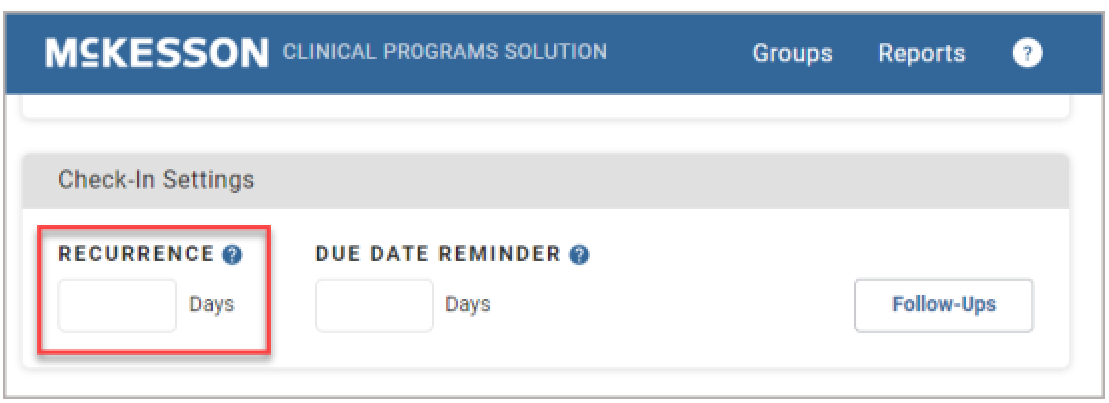
Setting the Time Period to Re-Ask Patients to Enroll

If a Patient 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



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**).

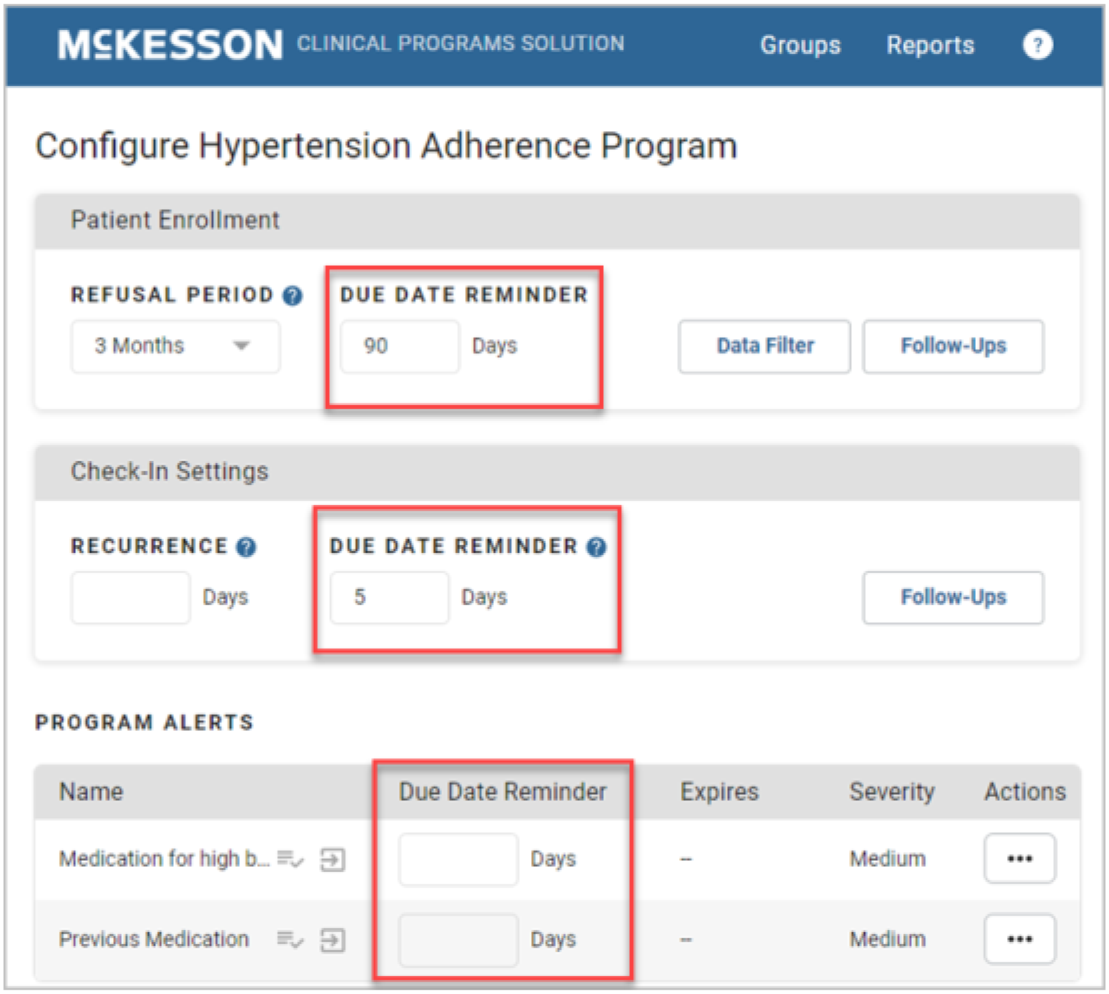
A Check-In Program's **Recurrence** field allows you to specify how often the Check-In will become due for patients enrolled in the Program. You can input a number from 0 to 999 in the **Recurrence** field.

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, by default, in the **Clinical App** and **Alert Queue**. For example, if you set this field to **4**, the Alert will appear in the **Clinical App** and **Alert 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 **Alert 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 **Alert Queue**.

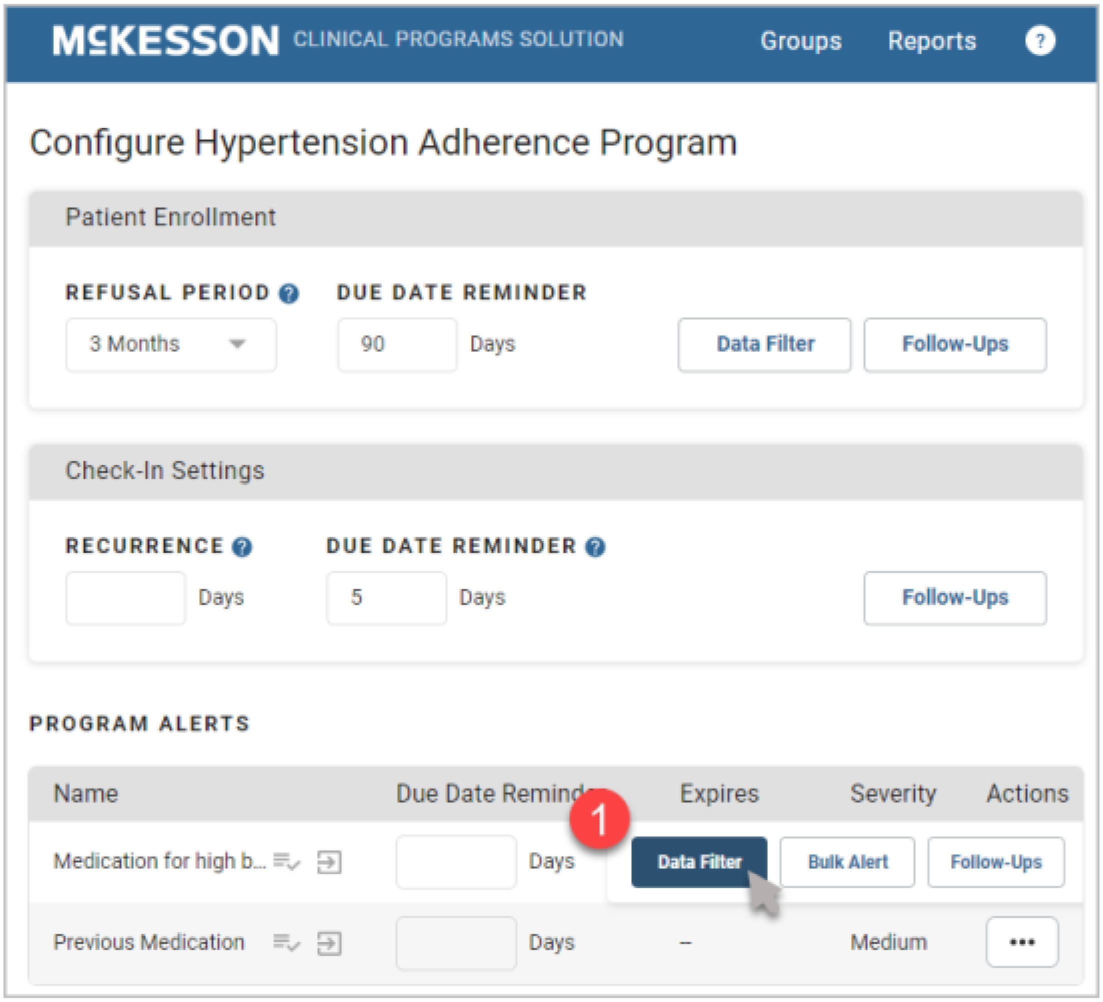
Note:
You will only see this field in the **Patient Enrollment** section for Programs with an **Enrollment Type** of **Patient Enrollment** (not for those with an **Enrollment** Type of **No Enrollment**).


McKESSON CLINICAL PROGRAMS SOLUTION
Groups
Reports
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

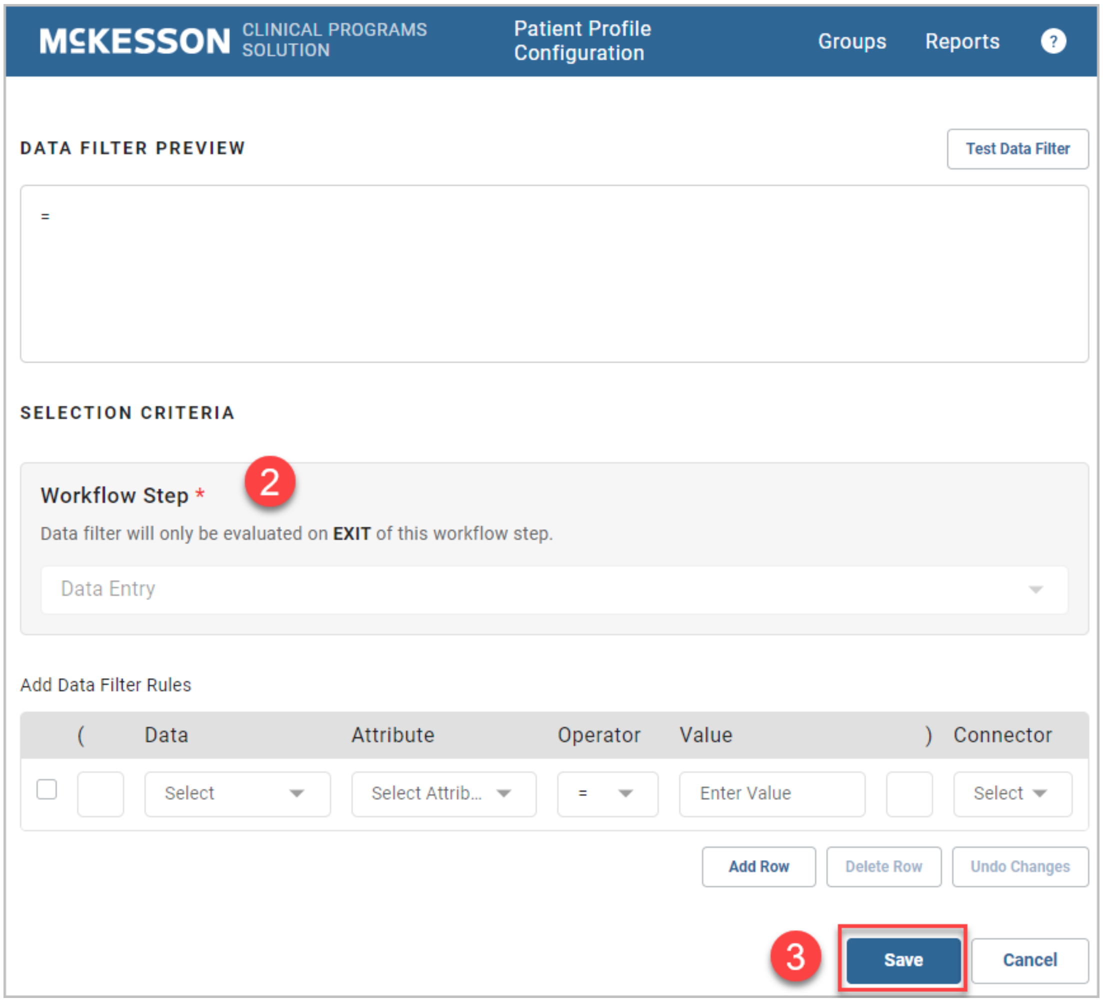
Setting Up Data Filter, Bulk Alert and Follow-Ups for Program Alerts

Data Filter

The Data Filters in the Program Alerts section of the window are the filters you set up to determine the criteria for when a Program Alert is generated. When the criteria have been met, the Program Alert will be created during workflow.



1. To get started, select the (...) under **Actions**, if applicable, to display the buttons. Select the **Data Filter** button next to the first Alert for which you want to edit the Data Filter.

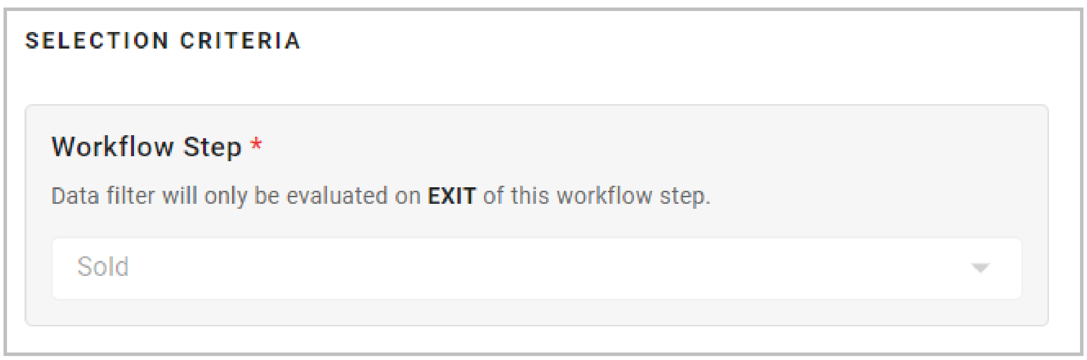


2. Under **Selection Criteria**, the **Workflow Step** option is only available to edit for Rx Hold Alerts. But it displays for all Alerts to show you the workflow step where the Alert will be triggered.

   - For a Standard type of Alert, the Alert will be evaluated on exit of Data Entry. This is noted on the window and cannot be changed.

- For an Rx Hold Alert, the Alert will be evaluated on entry of one of the following selected from the drop-down menu: **Reception**, **Data Entry**, **Pre-Verifcation 1** or **Pre-Verification 2**.

- For a Refill Reminder Alert, the Alert will be evaluated on exit of Sold. This is noted on the window and cannot be changed.



Important:
The **Refill Reminder** Alert and **Rx Hold** Alert options are only available with the EnterpriseRx Specialty Solution (ESS). Please contact your Account Executive for more information.

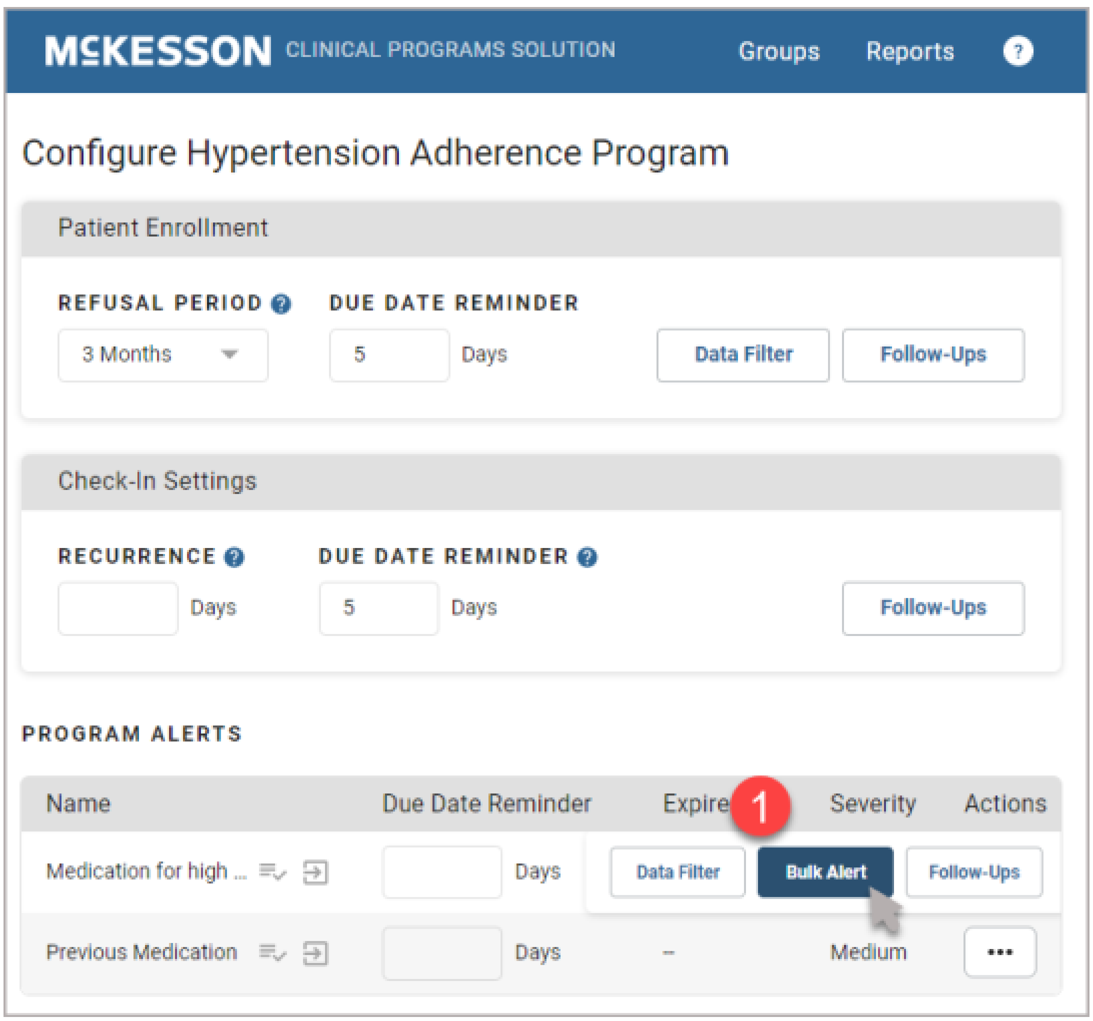
The Data Filters in this area work exactly like those that are set up for Patient Enrollment Alert. Follow the steps in either the "Simple Data Filter Example" on page 57, "Complex Data Filter Example #1" on page 60 or "Complex Data Filter Example #2" on page 61 sections above to configure the Data Filter of each Program Alert.

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

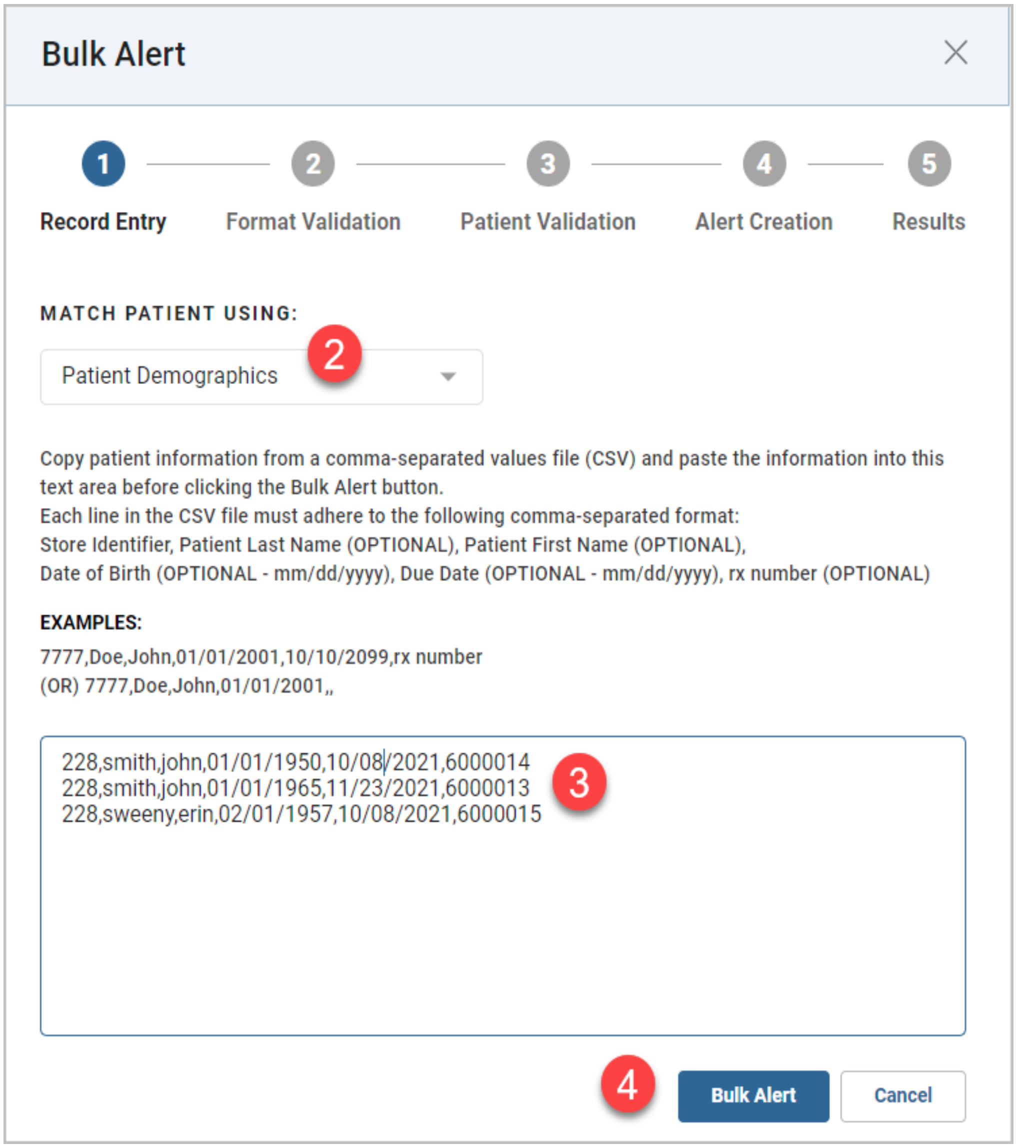
3. Select the **Save** button to save the Data Filter.

Bulk Alert

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



1. To get started, select the (...) under **Actions**, if applicable, to display the buttons. Select the **Bulk Alert** button next to the first Alert for which you want to bulk Alert. The **Bulk Alert** window displays.



2. From the **Match Patient Using** drop-down select either **Patient Number** or **Patient Demographics. Patient Demographics** is the default**.**

3. 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.

   When **Patient Demographics** is selected, 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**, **Custom Field(s)**.

   When **Patient Number** is selected, each line in the list must adhere to the following comma separated format: **Store Identifier**, **Patient Number**, **Due Date**, **Custom Field(s)**.

   Note the following specifics about these attributes:

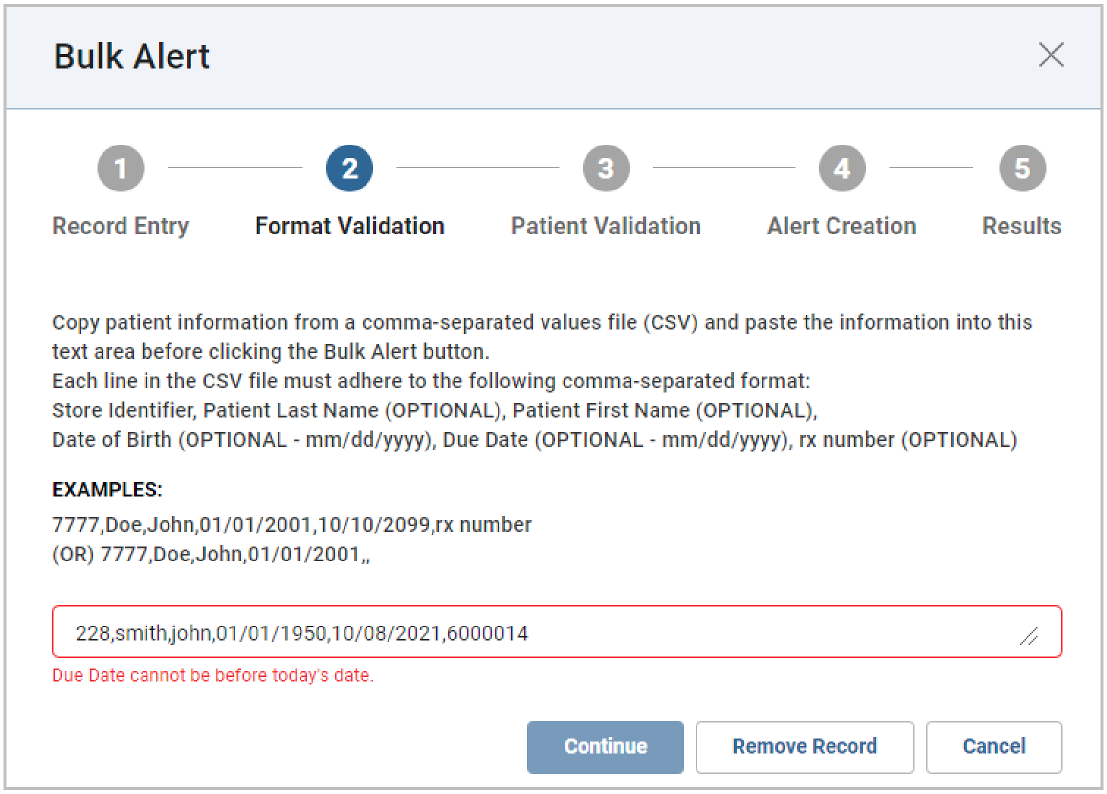
- **Store Identifier:** Required. Maximum length is 50 characters.
- **Patient Number**: Required. The CPS Patient Number for the patient.
- **Patient Last Name:** Optional. Maximum length is 50 characters.
- **Patient First Name:** Optional. Maximum length is 50 characters.
- **Date of Birth** (mm/dd/yyyy format): Optional. Maximum length is 10 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.
- **Custom Field(s)**: Optional custom field added to the Alert **Text** field when building the Program Alert.

> **Important:**
> Any Custom Fields configured for a Program Alert will display as optional fields at the end of the Bulk Alert input line. If a value is provided for a Custom Field, when the Alert is successfully generated via Bulk Alert, the Custom Field will be populated with the provided value within the Alert's text at the configured location. For more information on adding Custom Fields into Alerts, please refer to "Building Program Alerts" on page 44.

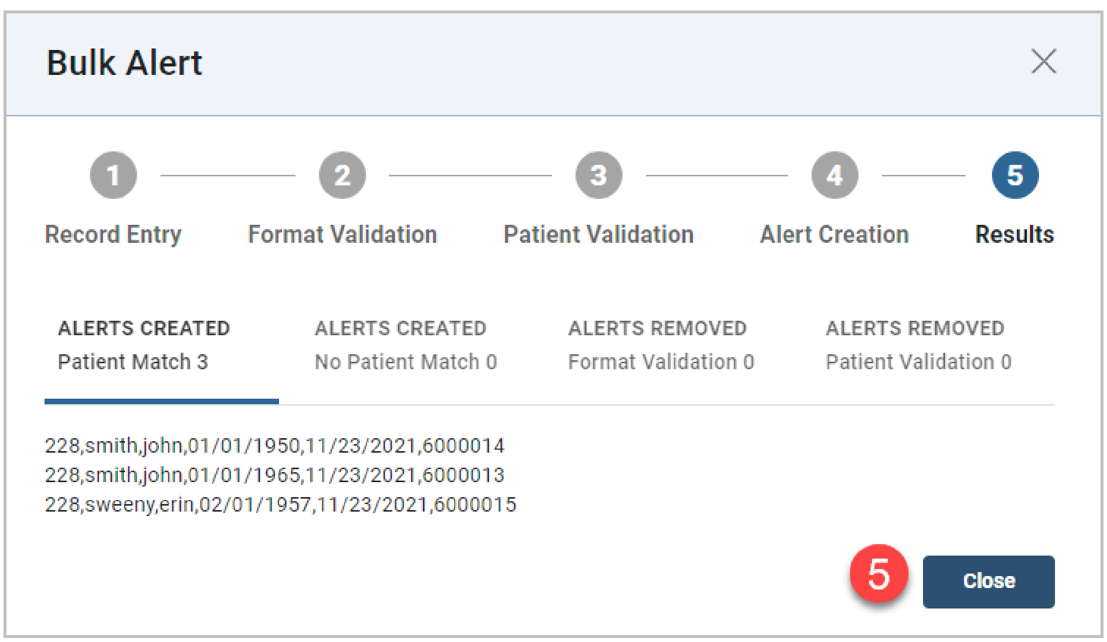
Bulk Alert accepts the following characters in the **Patient First Name** and **Patient Last Name** fields:

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

4. 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, the process stops at **Format Validation**. Either select the **Remove Record** button to remove the record from the Bulk Alert or make the suggested correction and select the **Continue** button.



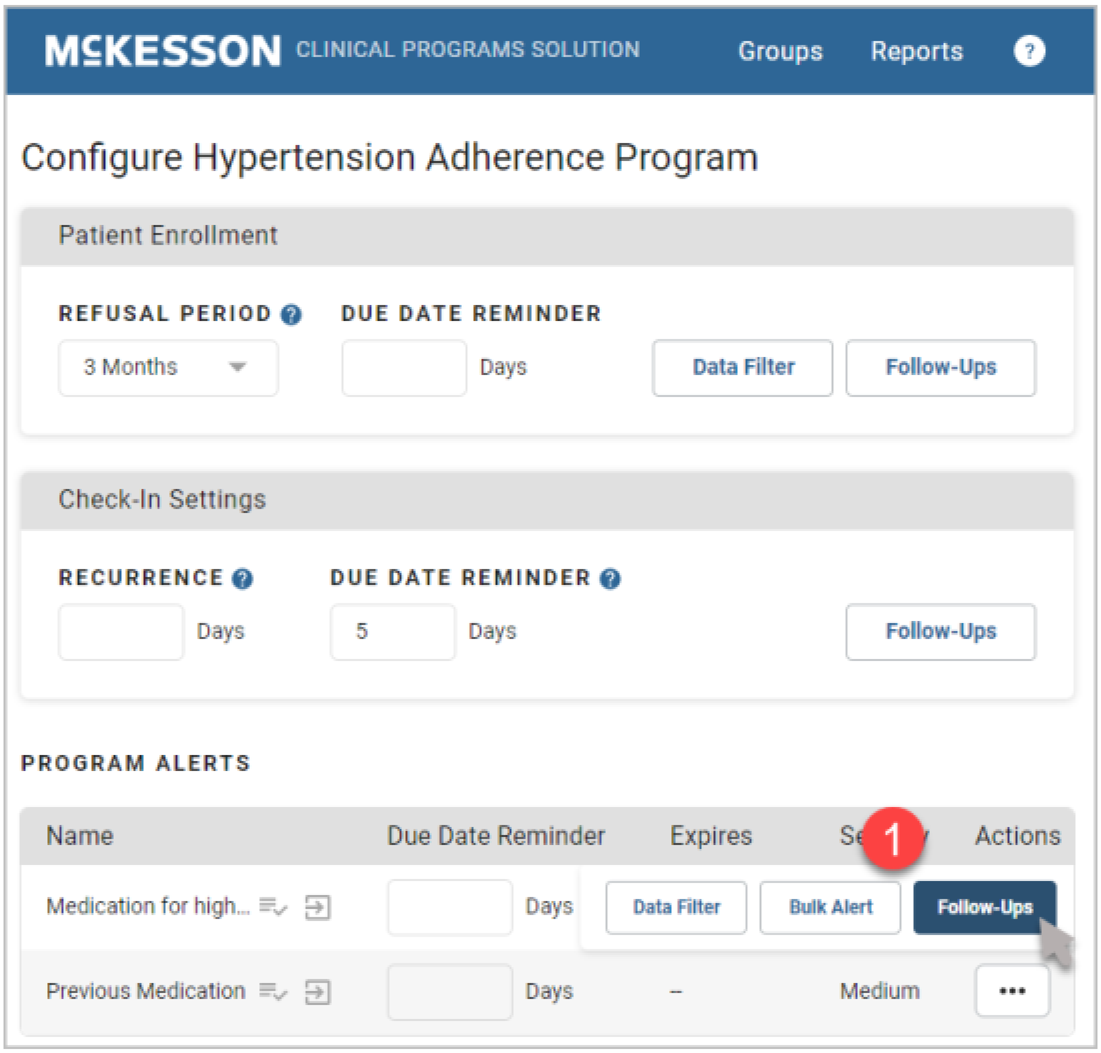
When the process finishes successfully, the **Results** display.



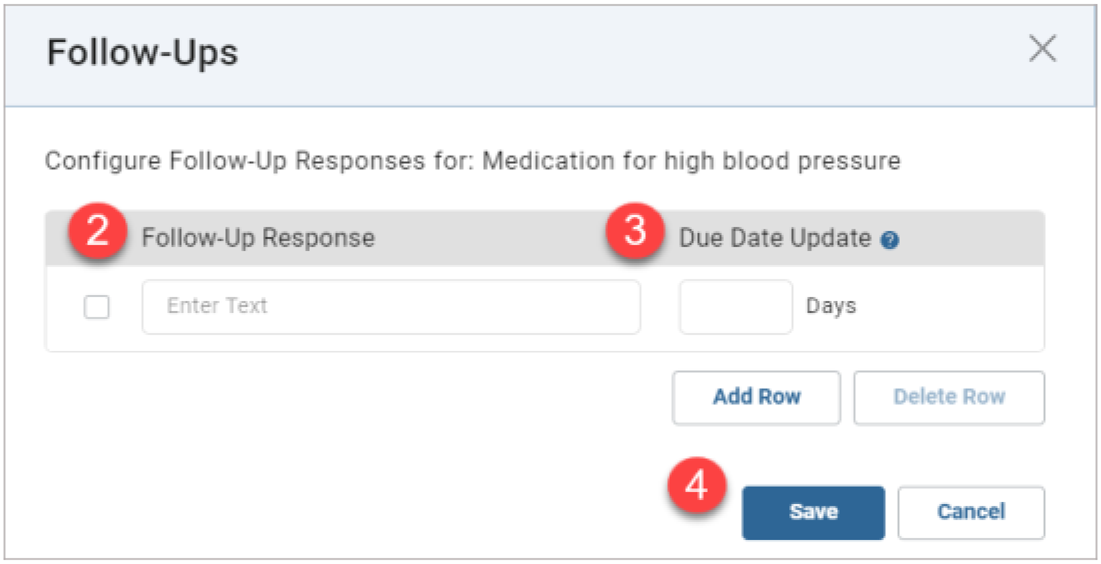
5. Select the **Close** button to close the window.

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.



1. To get started, select the (...) under **Actions**, if applicable, to display the buttons. Select the **Follow-ups** button next to the first Alert for which you want to add Follow-Up Responses. The **Follow-Ups** window displays.

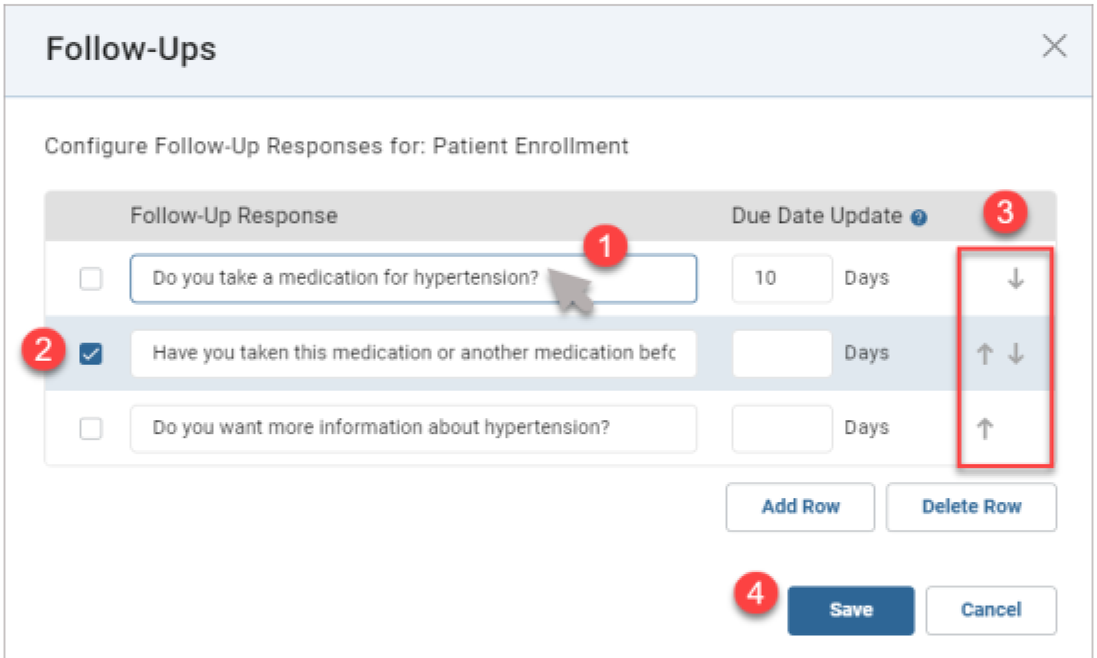


2. In the field enter the text for the Follow-Up Response.
3. Enter a **Due Date Update** in days or leave it blank. When this **Follow-Up Response** is selected for an Alert, the Alert's due date is calculated by adding the number of days specified in the **Due Date Update** field to the current calendar 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" on the next page below.

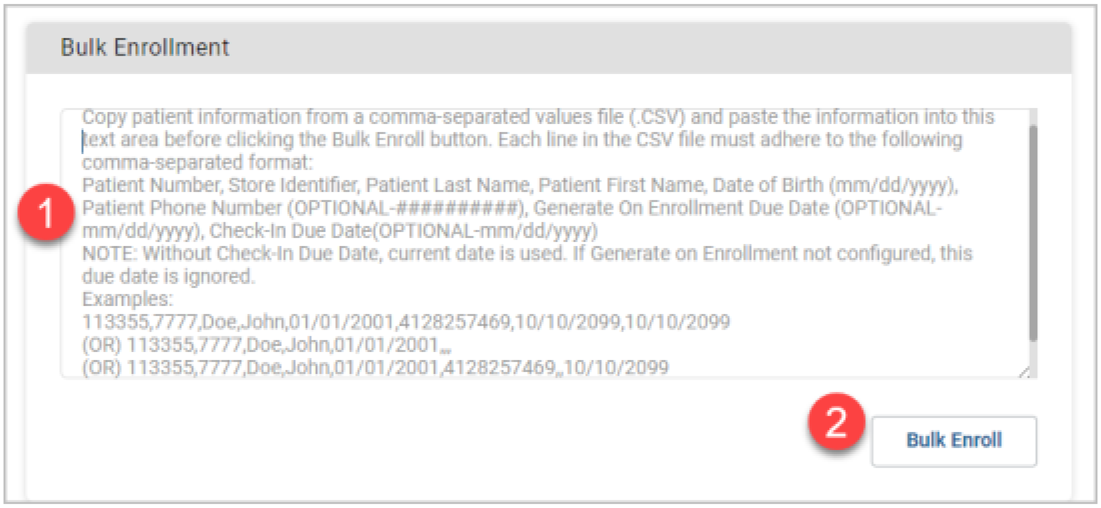
Editing Follow-Ups



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.

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. Additionally, the required information will be different when you are completing bulk enrollment for a Check-In Program. The image above shows what the configuration window will look like for a Check-In Program.

   If you are completing a bulk enrollment for a non-Check-In 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**.

Non-Check-In Program

If you are completing a bulk enrollment for a non-Check-In 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, Patient Phone Number, Generate On Enrollment 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.
- **Patient 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 Program

If you are completing a bulk enrollment for a Check-In Program, each line in the list must follow this comma separated format: **Patient Number**, **Store Identifier**, **Patient Last Name**, **Patient First Name**, **Date of Birth**, **Patient 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.
- **Patient 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

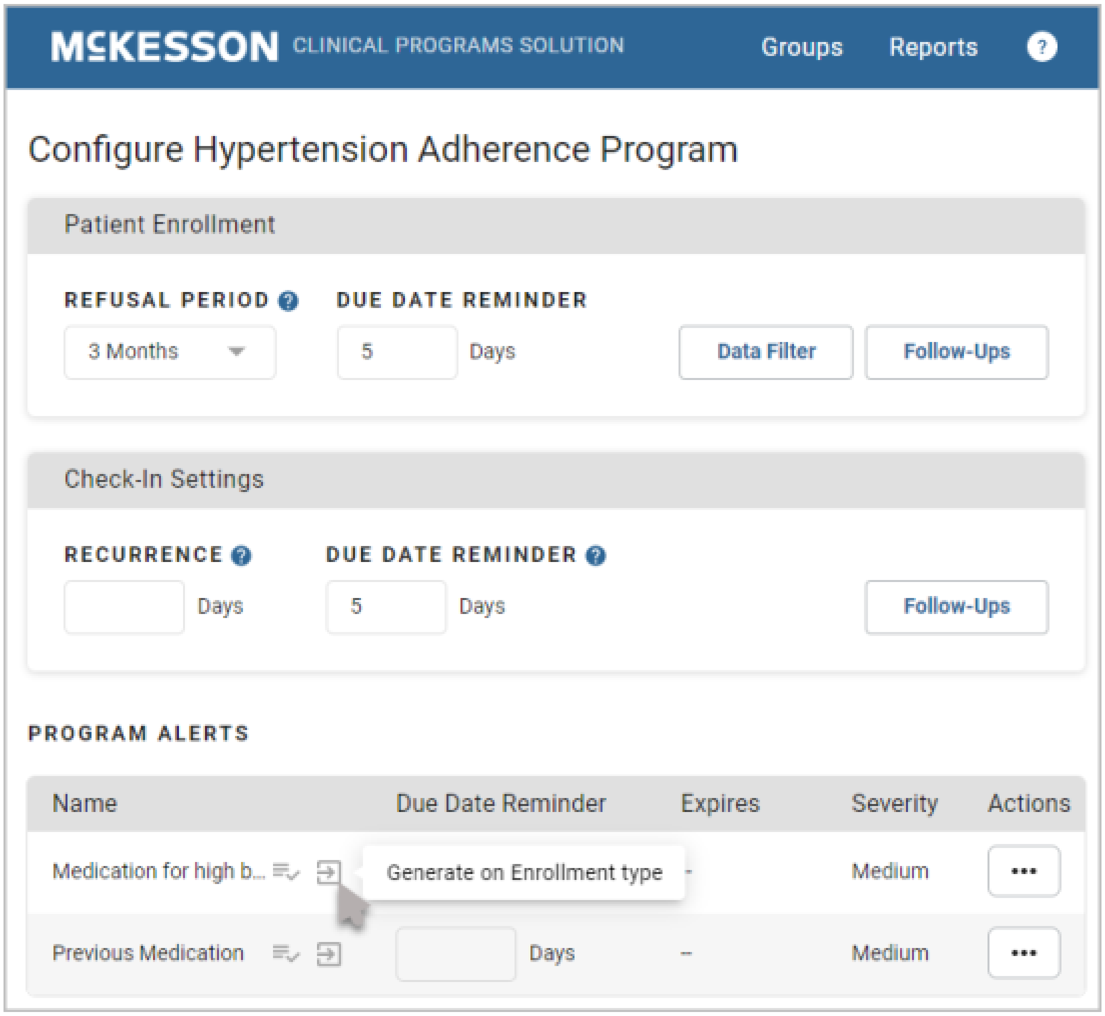
Unread Alert Status. If a **Generate On Enrollment Due Date** is provided and there are no Generate On Enrollment Alerts configured for that program, the date will be ignored.

- **Check-In Due Date** (mm/dd/yyyy format): Optional. Maximum length is ten characters. When a date is provided in the **Check-In Due Date** field, the due date for the Check-In Alert will be set to the specified date. When the **Check-In Due Date** field is left blank, the due date for the Check-In Alert will be set to the current date.

> **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.



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 "Enabling Self-Directed Programs" on page 87 to finish the Program.

Chapter 5: Enabling Self-Directed Programs

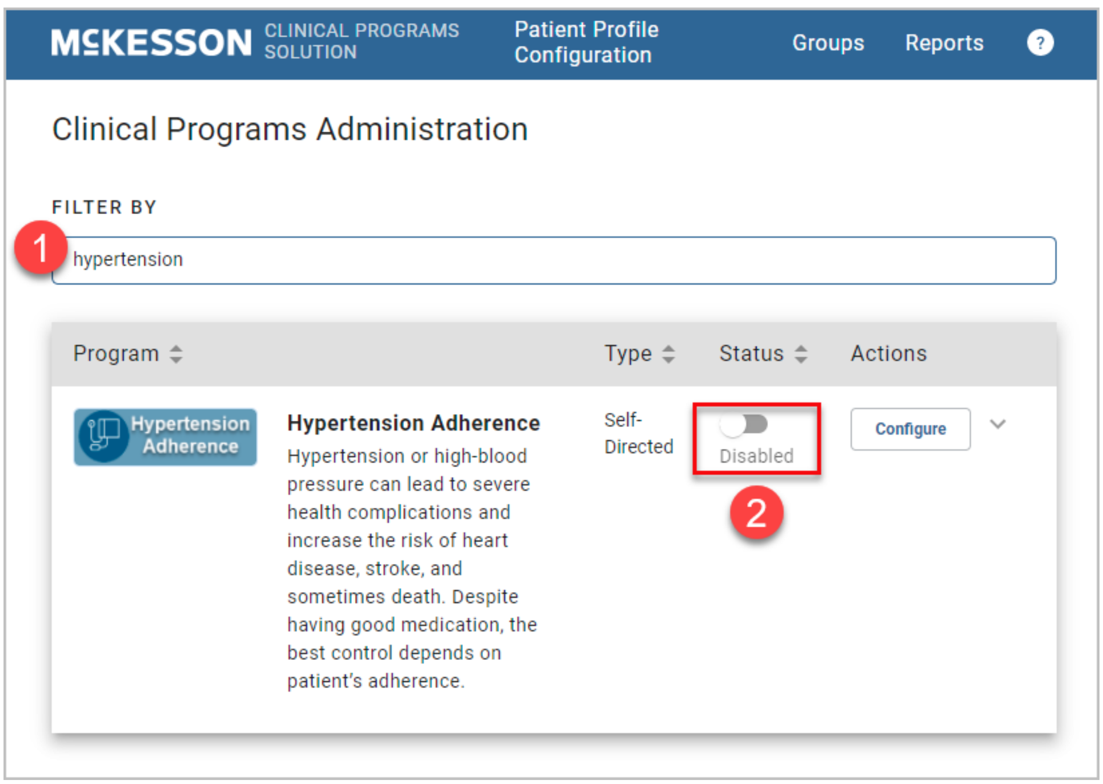
After configuring a Self-Directed Program, the next step is to enable it.

Steps to Enabling Self-Directed Programs

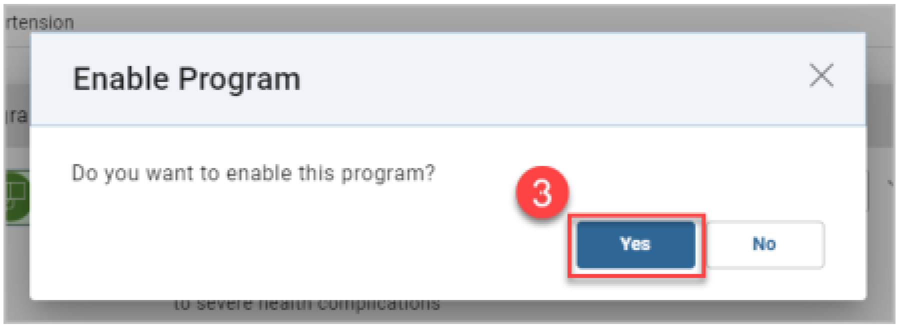
- "Enabling Self-Directed Programs" below
- "Enabling a Preconfigured Program" on the next page

Enabling Self-Directed Programs

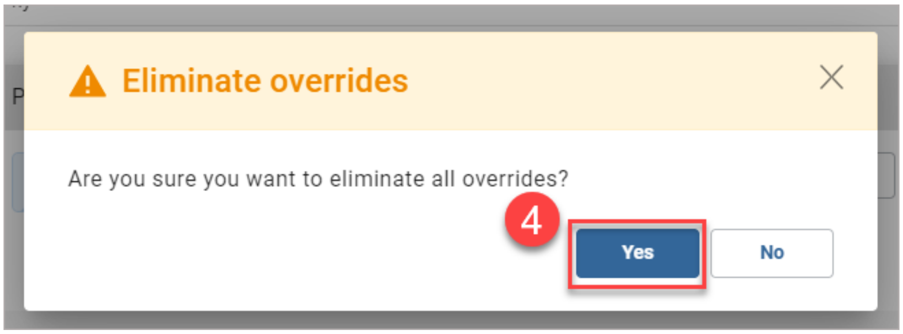
After you have configured your Self-Directed Program the last step is to enable it, so that it can be utilized by pharmacy staff. Until the Program is enabled, Alerts and Enrollments will not be seen by users. To enable the Program, navigate to **CPS Program Admin**.



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.

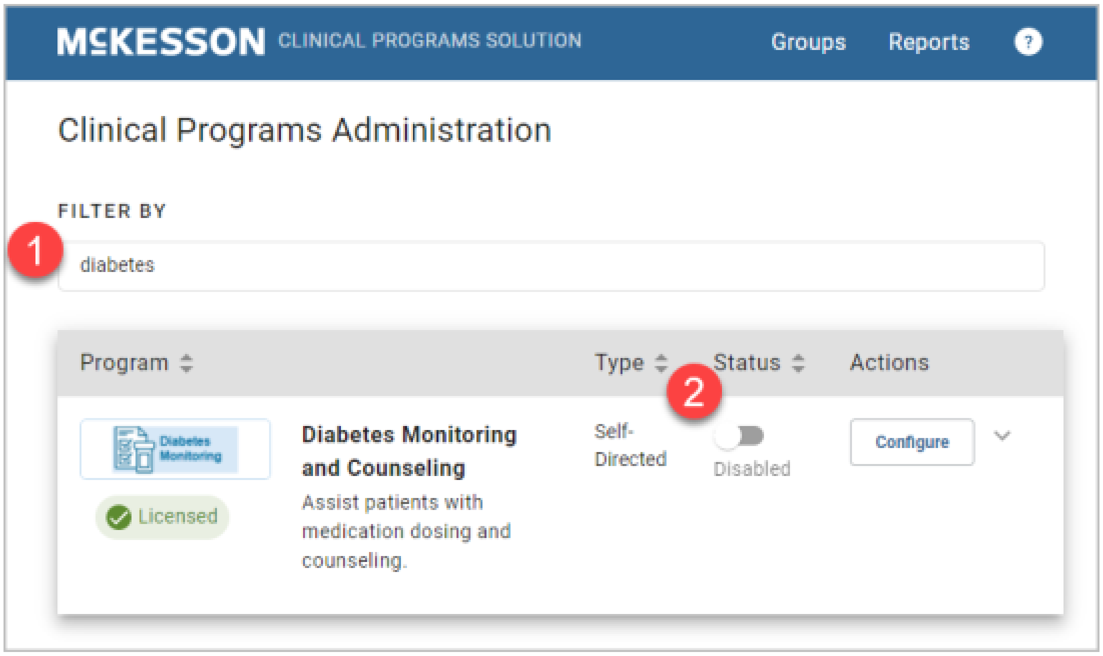
Now the Program is ready to use in the pharmacy. Alerts will appear in the **Clinical App** (see "Viewing Alerts in the Clinical App" on page 126) and in the Alert Queue (see "CPS Alert Queue" on page 180**)** when the filter criteria have been met.

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.

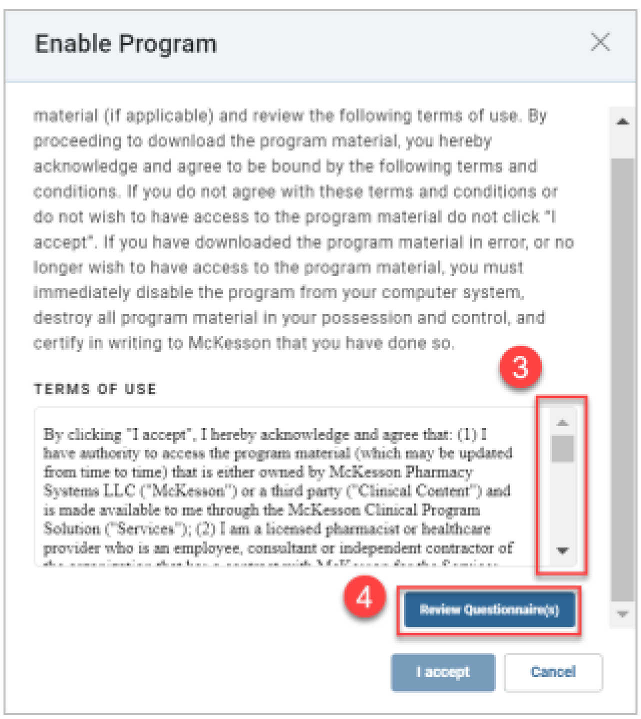
Important:
Preconfigured Programs are only available with the CPS Premium Subscription. Please contact your Account Executive for more information.

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.



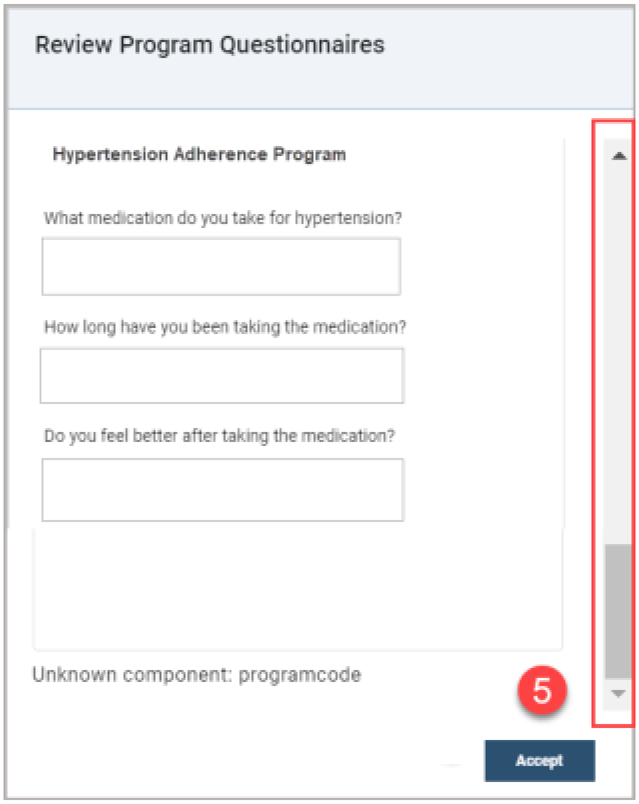
1. Type the Program name into the **Filter By** text box. If several names include the same character string, they will all show in the list. The more characters that are entered into the filter, the fewer entries that will be contained in the list.

2. Once the Program displays in the list, toggle the status to **Enabled** and the **Enable Program** window displays.

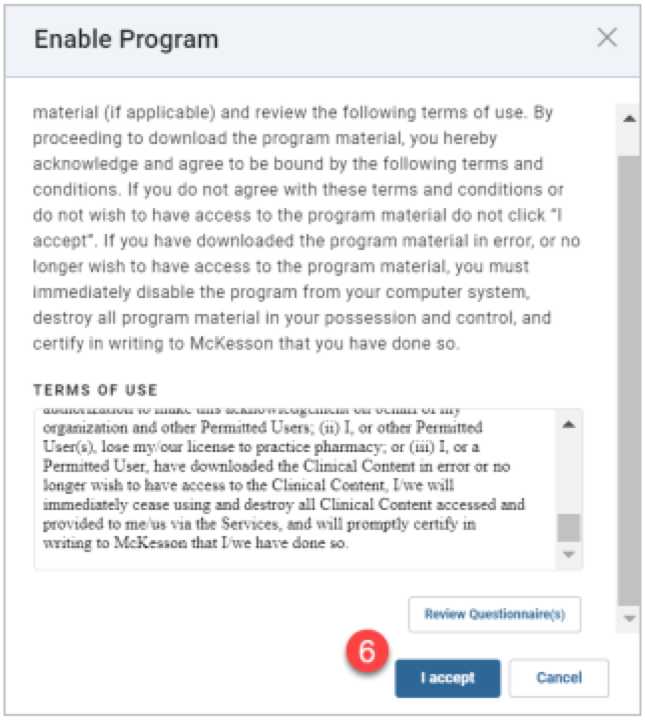


3. The **Enable Program** window will display with the Terms of Use for the Program. Use the vertical scrollbar to review the instructions and entire Terms of Use.

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

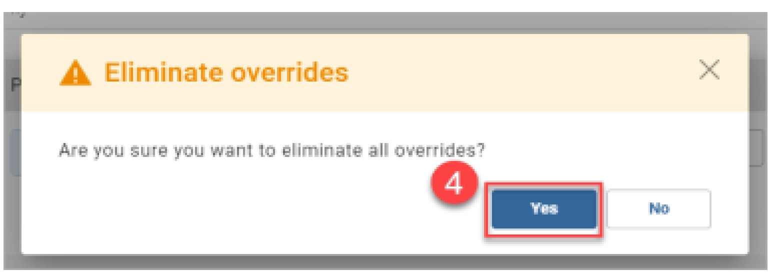


5. Use the vertical scroll bar to review the questionnaire(s) associated to the Program. When finished reviewing, select the **Accept** button.



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 "Viewing Alerts in the Clinical App" on page 126) and in the Alert Queue (see "CPS Alert Queue" on page 180) when the filter criteria have been met.

Chapter 6: CPS Notes

CPS Notes allow for an additional way to document recent activity such as prescription or patient activity. When a patient is in context, pharmacy staff can create or view notes from the **Notes** tab in the **CPS Patient Profile** or the **Clinical App**. You can create and maintain note templates using the **Note Library**, accessed from the **CPS Program Builder**.

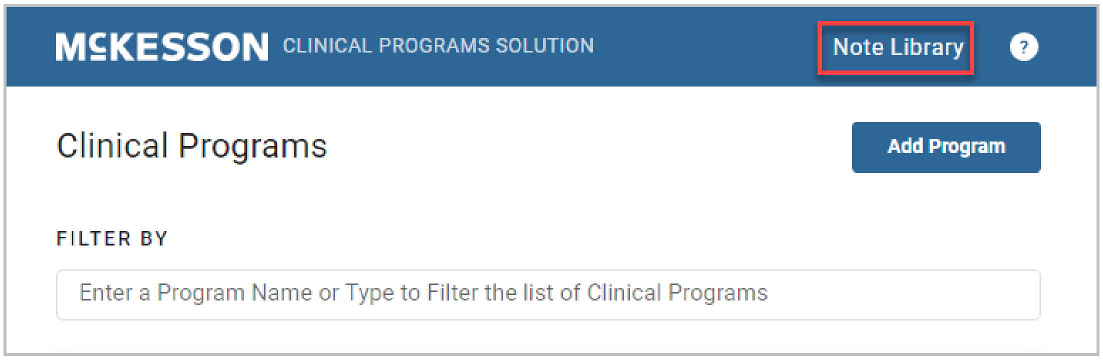
Tasks for Notes

Accessing the Note Library

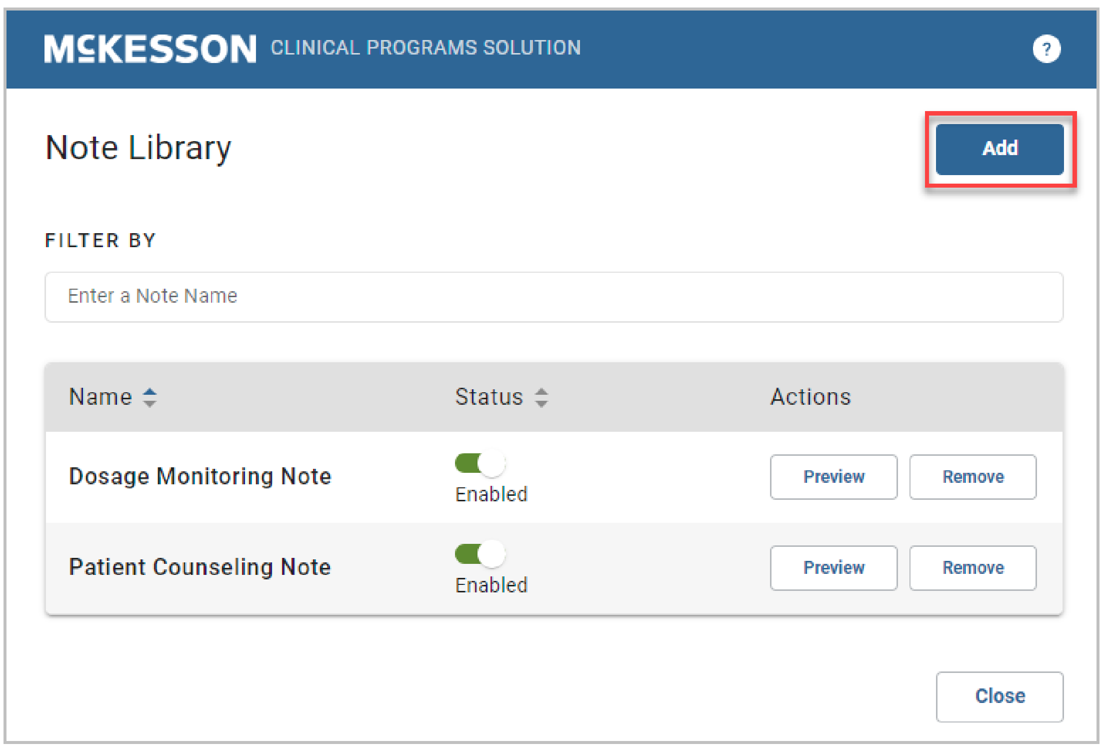
To access the **Note Library**, navigate to **CPS Program Builder.**

The **CPS Program Builder** window displays.

Select the **Note Library** option.

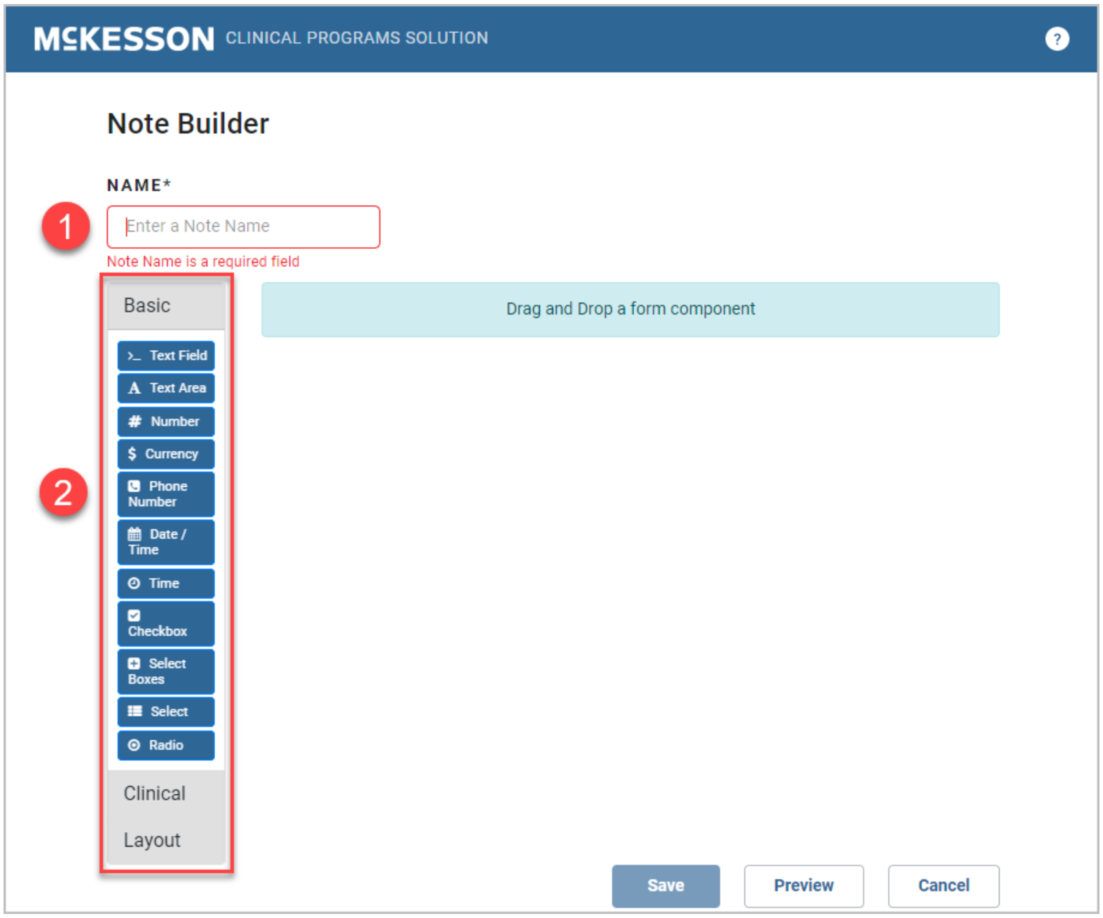


The **Note Library** window opens. To begin adding a note select the **Add** button and the **Note Builder** displays.



Building Notes

The **Note Builder** allows for the creation and customization of note templates. Creating a note template is similar to a creating a questionnaire, however a note is attached to a patient not to a Program or Alert.



1. To begin enter a note **Name**.
2. Select a component from Basic, Clinical and Layout lists on the left, then drag and drop it to the right to build your note. Each component can be customized, one at a time after it is added.

Tip:
Please refer to "Questionnaire & Note Components" on page 275 in the Appendix for a complete list and description of components.

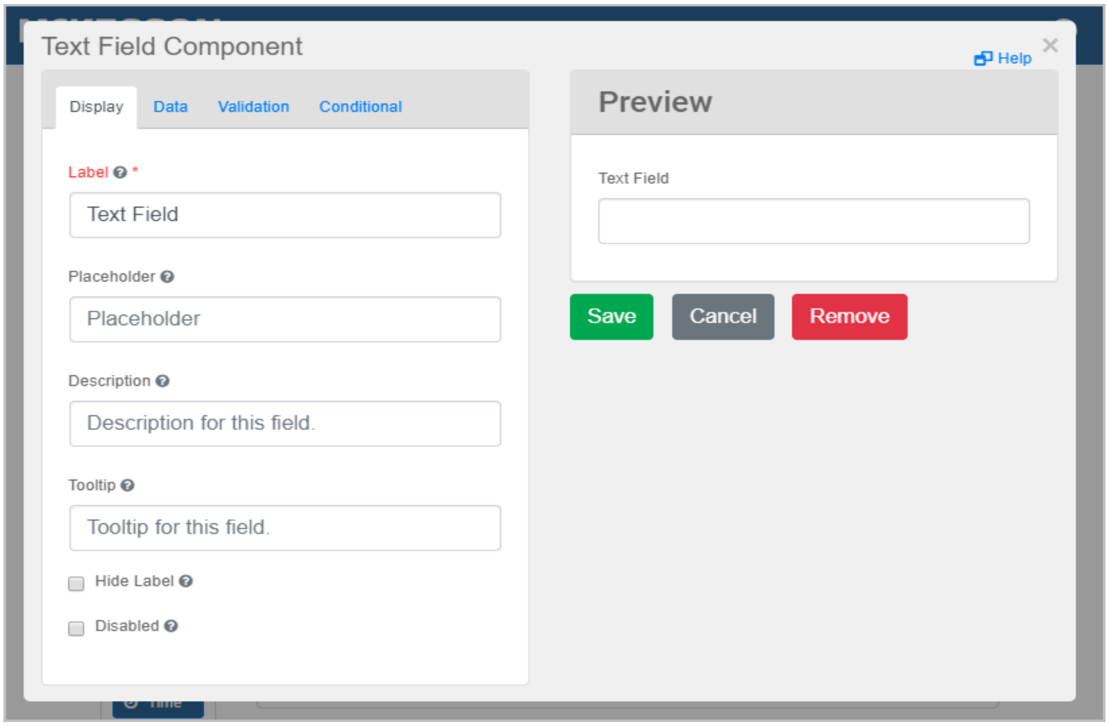
Note Components

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.

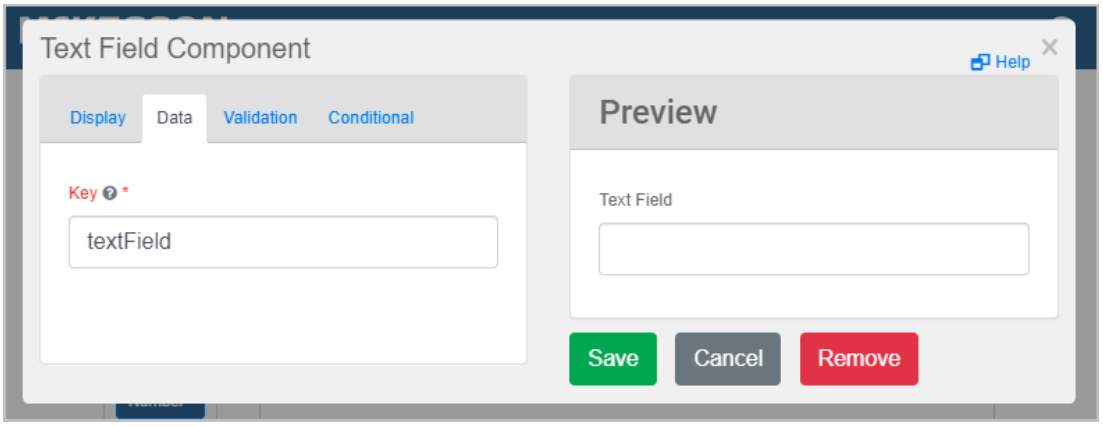
Display Tab



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

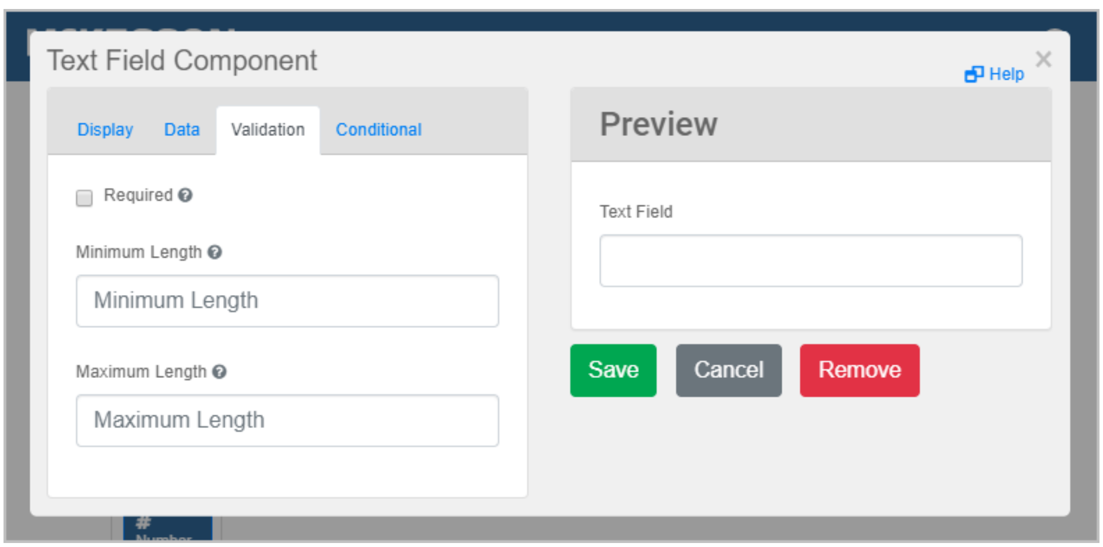
Data Tab



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

Data Tab	
Key	The **Key** value is used to identify this field when reporting on note values. The **Key** must be unique, you cannot use the same Key for other components. If no **Key** is entered into the field a **Key** will be generated.

Validation Tab



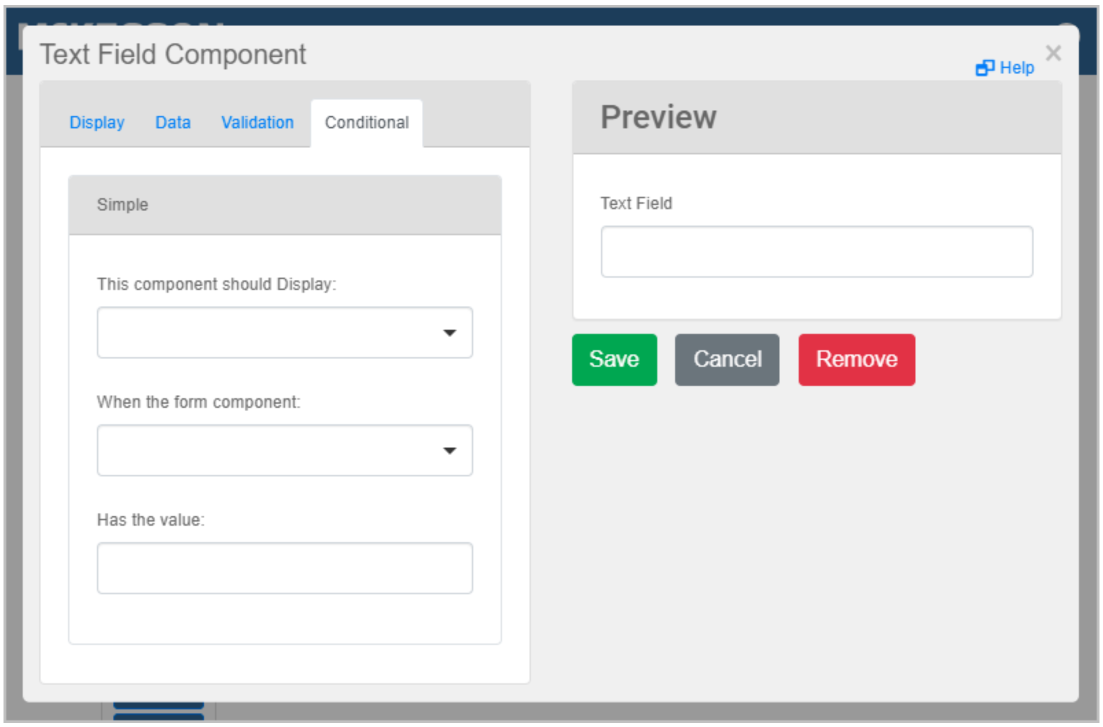
The following is a description of the field on the **Validation** tab for the **Text Field** component:

Validation Tab	
Required	A checkbox to require the **Text Field** to be filled in before the note 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

Note:
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 note. For example, if “Other” is selected on a particular radio button component then a text field is presented next to the user completing the note. If “Other” is not selected the text field will not display.



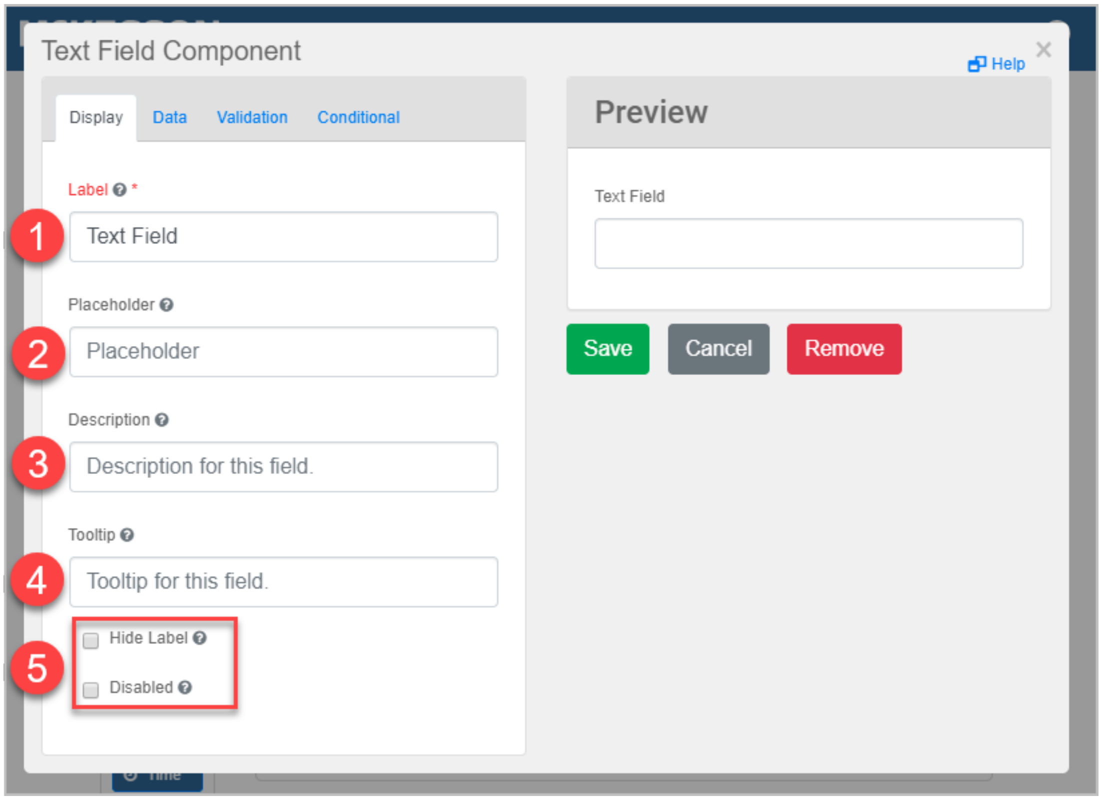
The following is a description of the fields on the **Conditional** tab for the **Text Field** component:

Conditional Tab	
This component should Display:	Choose **True** or **False** to display this component within the note based on the field values in **When the form component:** and **Has the value:**. – Selecting **True** will display the component when the conditional statement is met. – Selecting **False** will initially display the component and when the conditional statement is met, the component will be hidden.
When the form component:	Select an existing form component of your note that will be used as a reference for the condition.

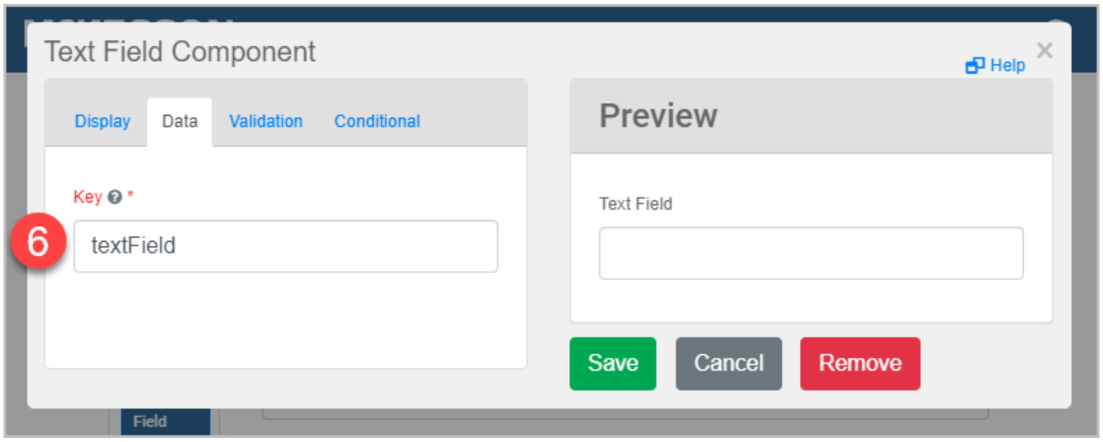
Conditional Tab	
Has the value:	Define the value captured in the note for the form component selected above to complete the conditional statement.

Note Component Customization Example Steps

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

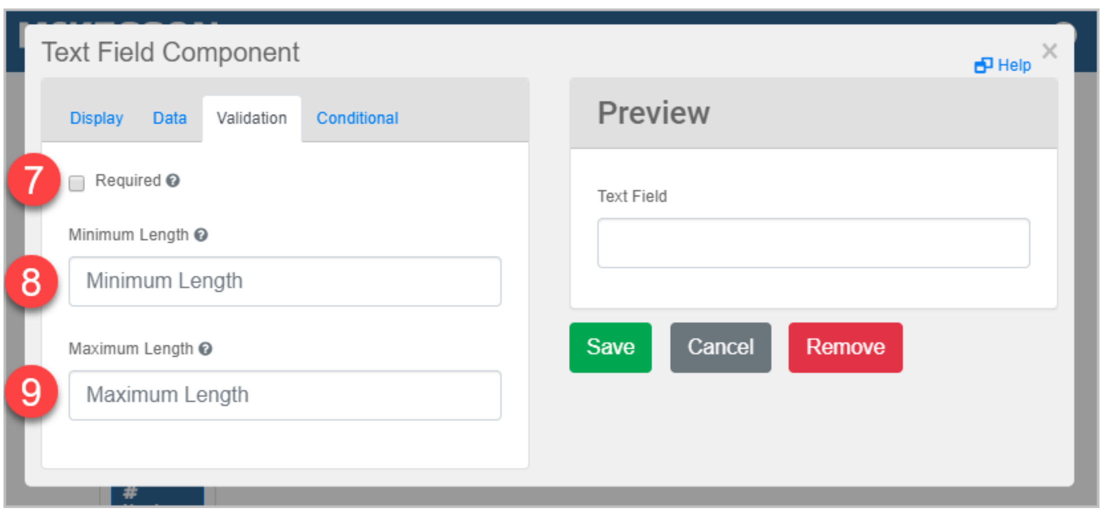


1. On the **Display** tab, type in a **Label** for the **Text Field**.
2. Enter placeholder text which is temporary text that will appear in the **Text Field** before user interaction.
3. Enter a description for the field that will appear below the **Text Field**.
4. Add a tooltip for the **Text Field** that will appear on the right side of the **Label**.
5. Use the **Hide Label** checkbox to hide the label of this component, which allows you to hide the label in the form builder, but not when it's rendered. Use the **Disabled** checkbox to make the **Text Field** disabled.

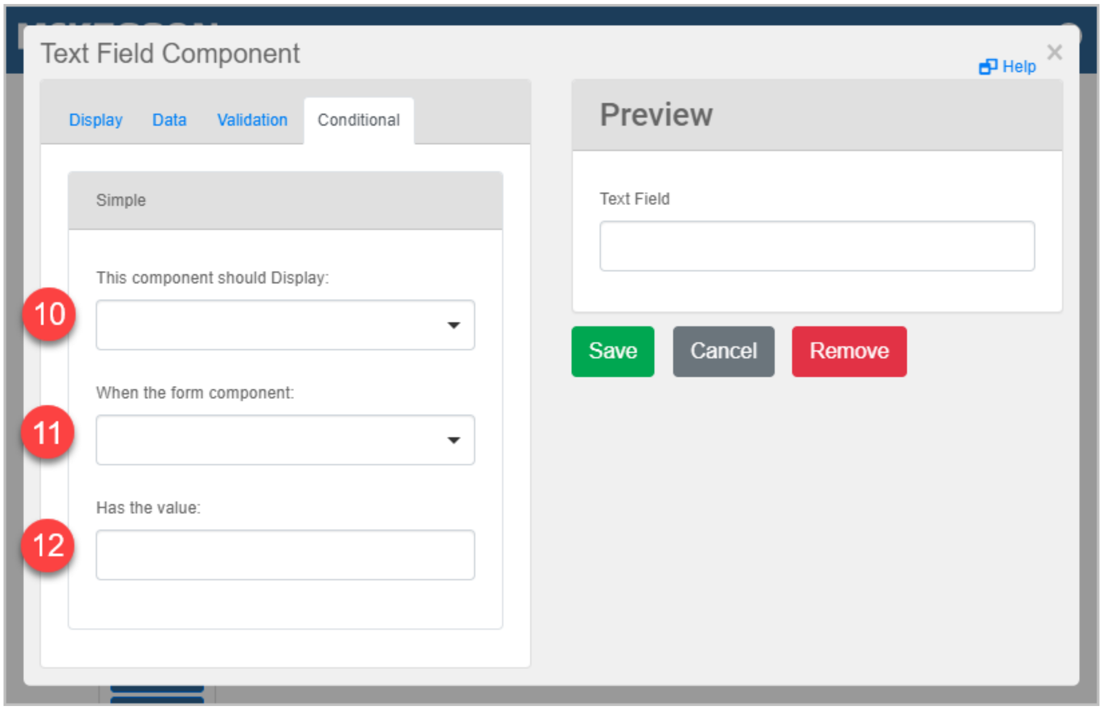


6. On the **Data** tab, enter a value in the **Key** field. The **Key** must be unique within the Program.

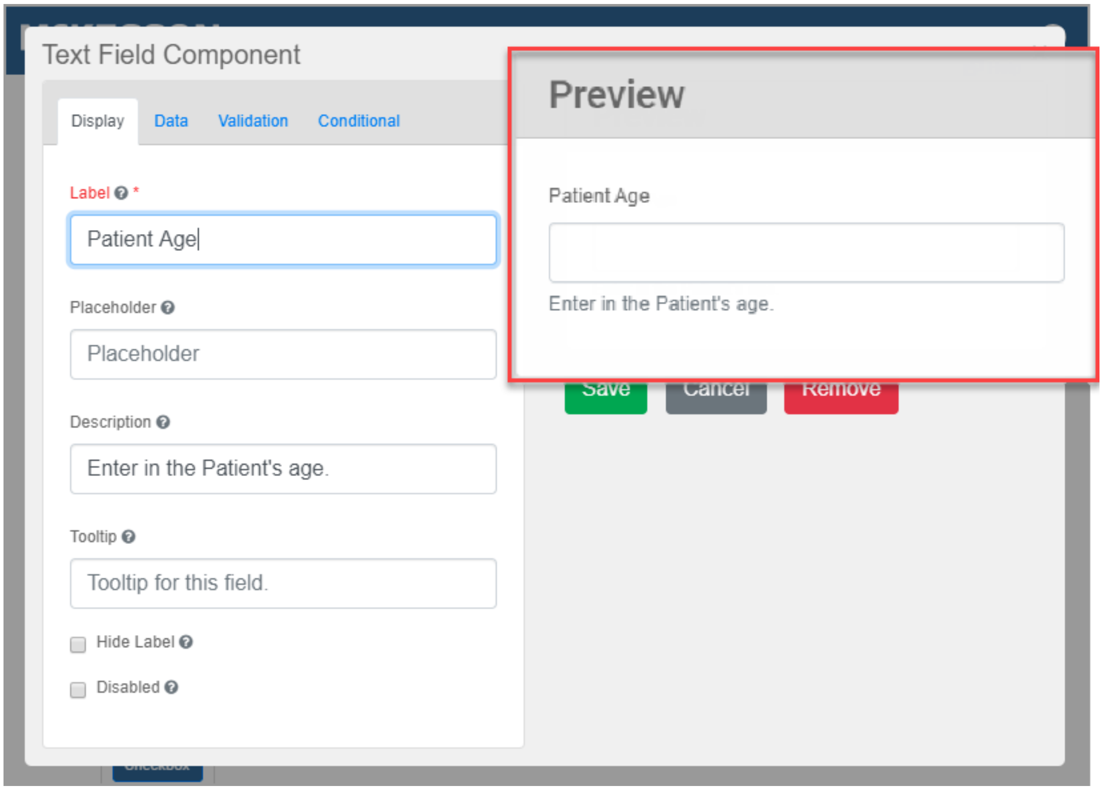
Note:
The **Key** field allows the user to assign a value to the field. The value could refer to something like a database key value for the note. Although this field is not required, the system will auto-generate a key value if no value is entered.



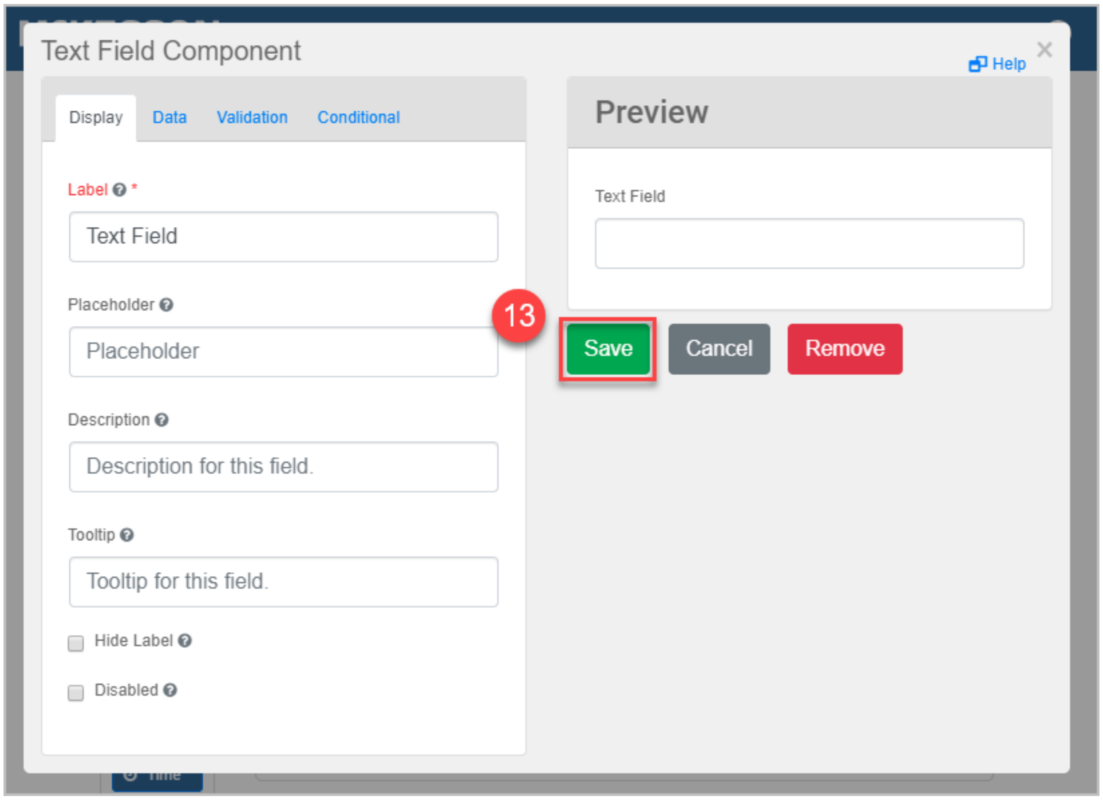
7. On the **Validation** tab, select whether or not to make the **Text Field** required.
8. Enter the minimum length requirement the **Text Field** must meet.
9. Enter the maximum length requirement the **Text Field** must meet.



10. On the Conditional tab, choose **True** or **False** to display this component within the note based on the field values in steps 11 and 12.
    - Selecting **True** will display the component when the conditional statement is met.
    - Selecting **False** will initially display the component and when the conditional statement is met, the component will be hidden.
11. Select an existing form component of your note that will be used as a reference for the condition.
12. Define the value captured in the note for the form component selected in step 11 to complete the conditional statement.



Tip:
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 note.

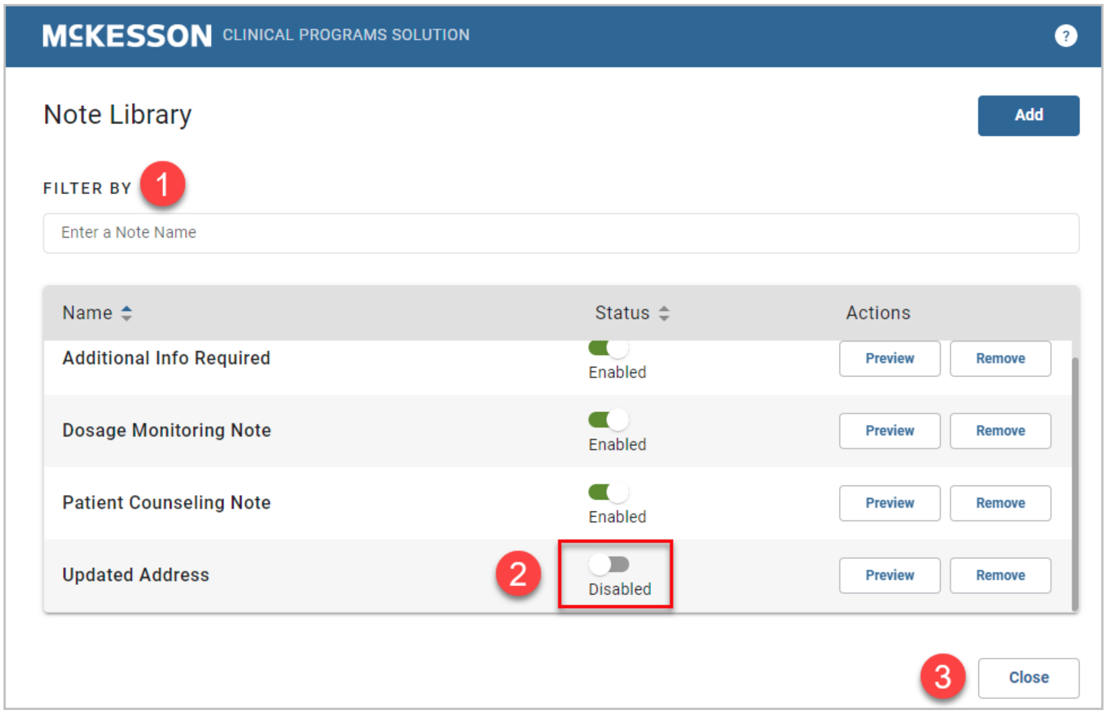


13. Select the **Save** button to add the **Text Field** to the note.

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

Enabling a Note

After you built your note the next step is to enable it, so that they can be utilized by pharmacy staff. Navigate to the **Note Library** window.



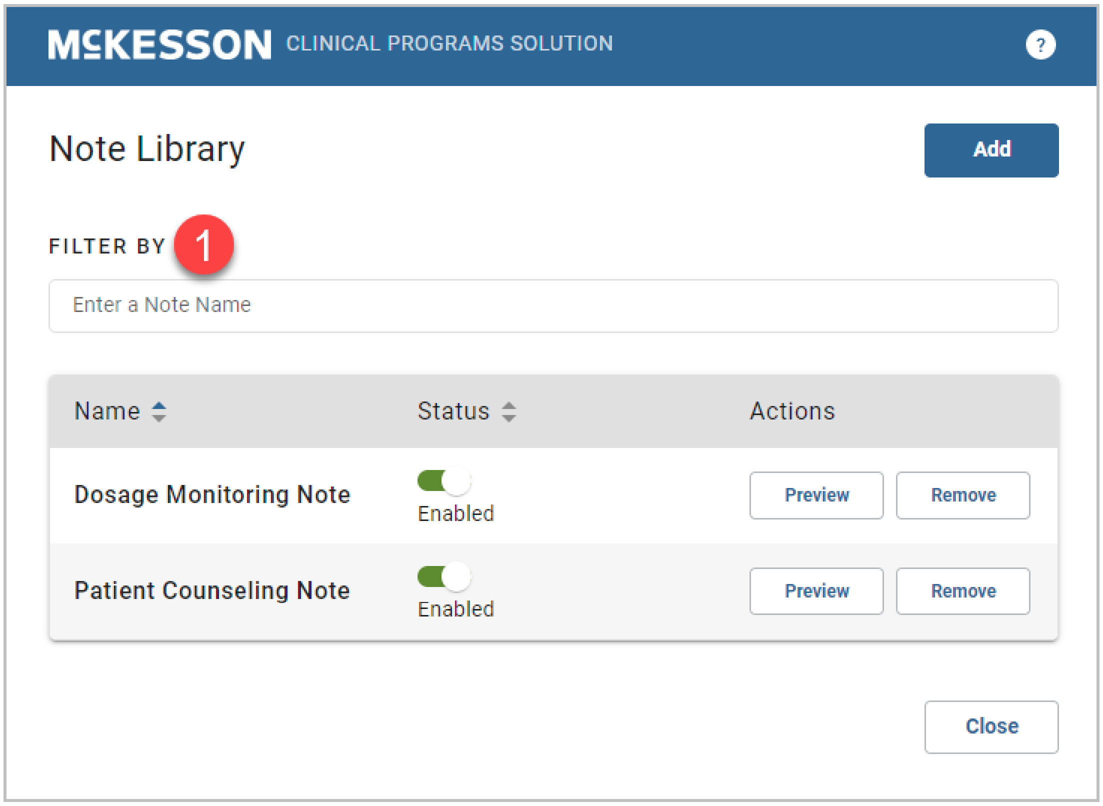
1. Type the note name into the **Filter By** text box to filter by note name. If several names include the same character string, they will all show in the list. The more characters that are entered into the filter, the fewer entries that will be contained in the list.
2. Located the name of the note. Toggle the status to **Enabled**.

Note:
Instead of removing a note completely, you can disable it and save it for future use. To disable a note toggle the status to **Disabled**.

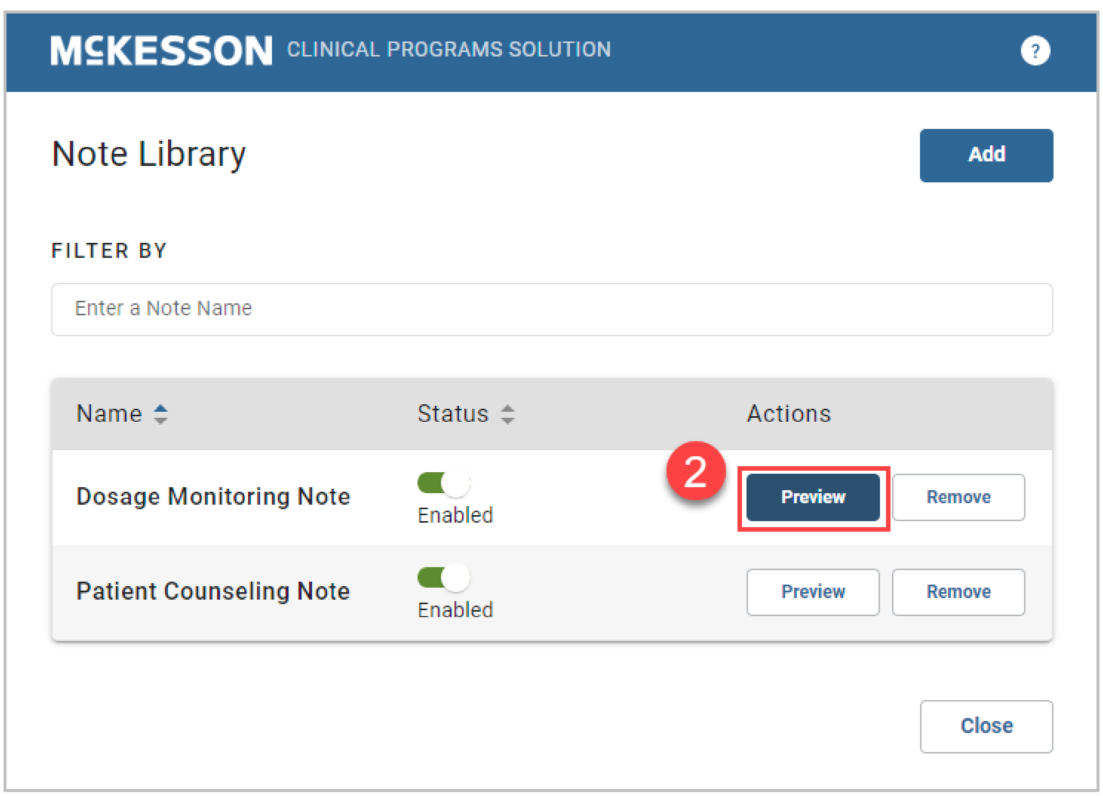
3. Select the **Close** button to close the window and go back to the **CPS Program Builder**.

Editing a Note

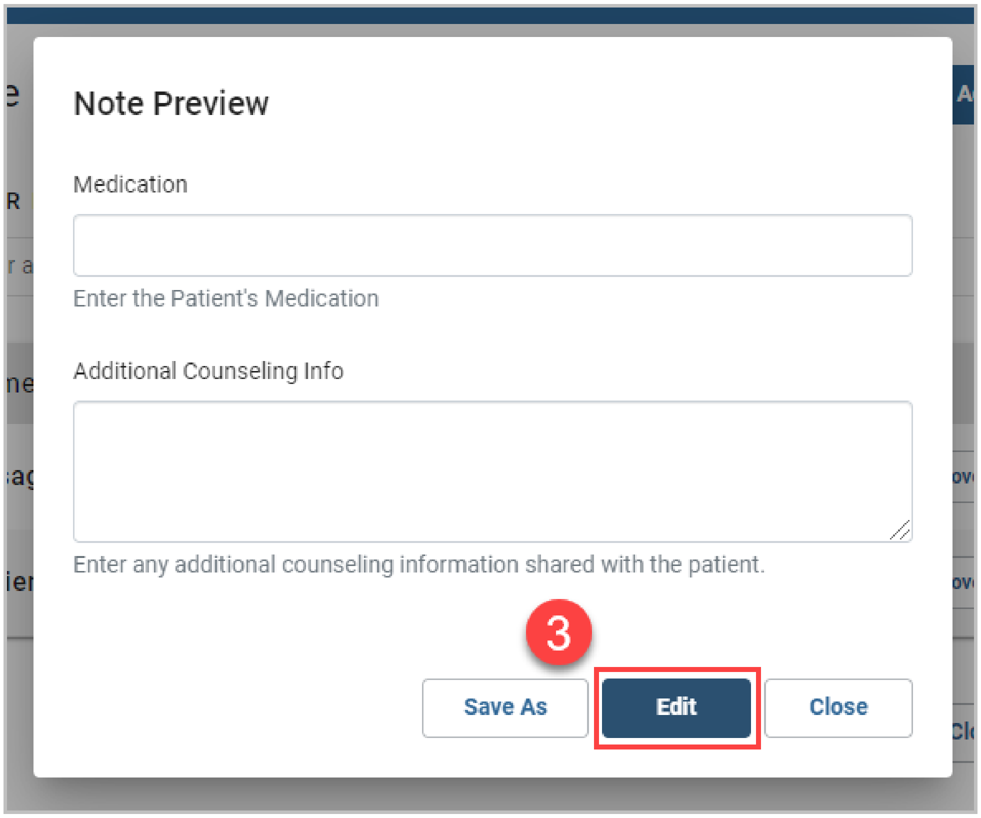
To edit a note, navigate to the **Note Library** window.



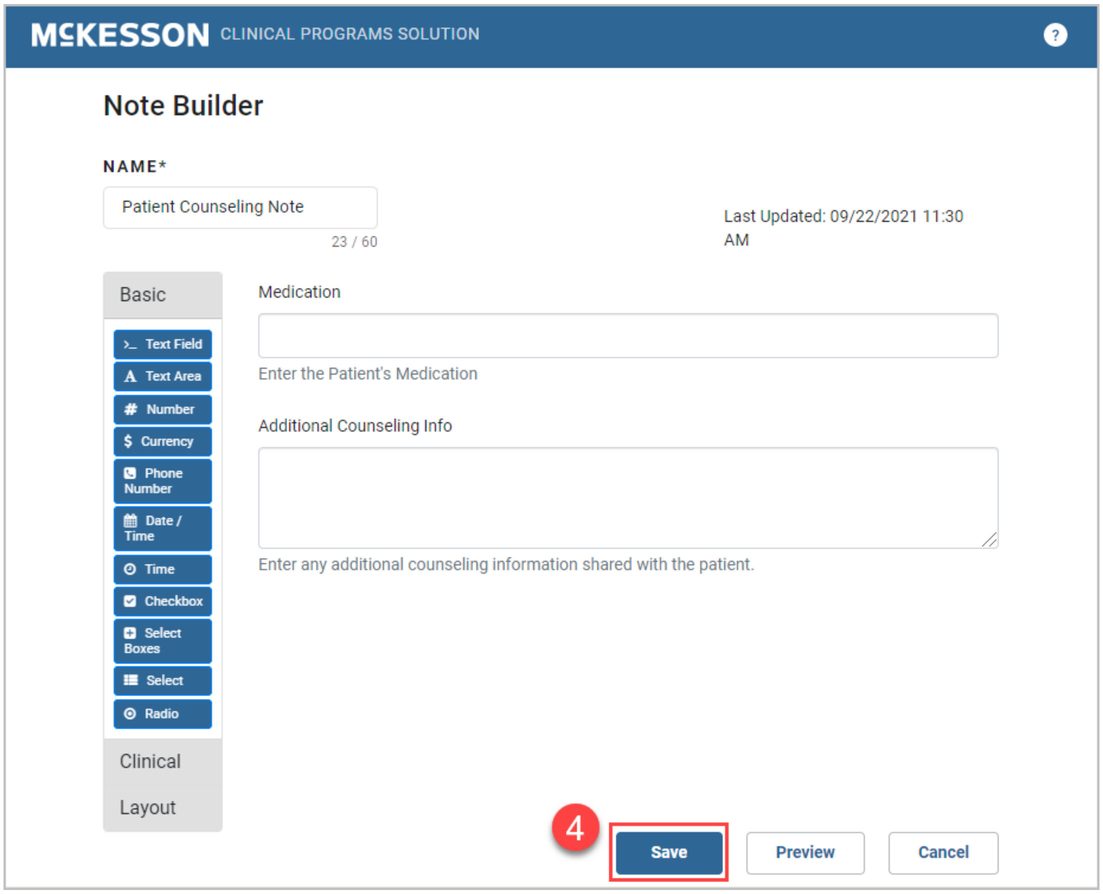
1. Type the note name into the **Filter By** text box to filter by note name. If several names include the same character string, they will all show in the list. The more characters that are entered into the filter, the fewer entries that will be contained in the list.



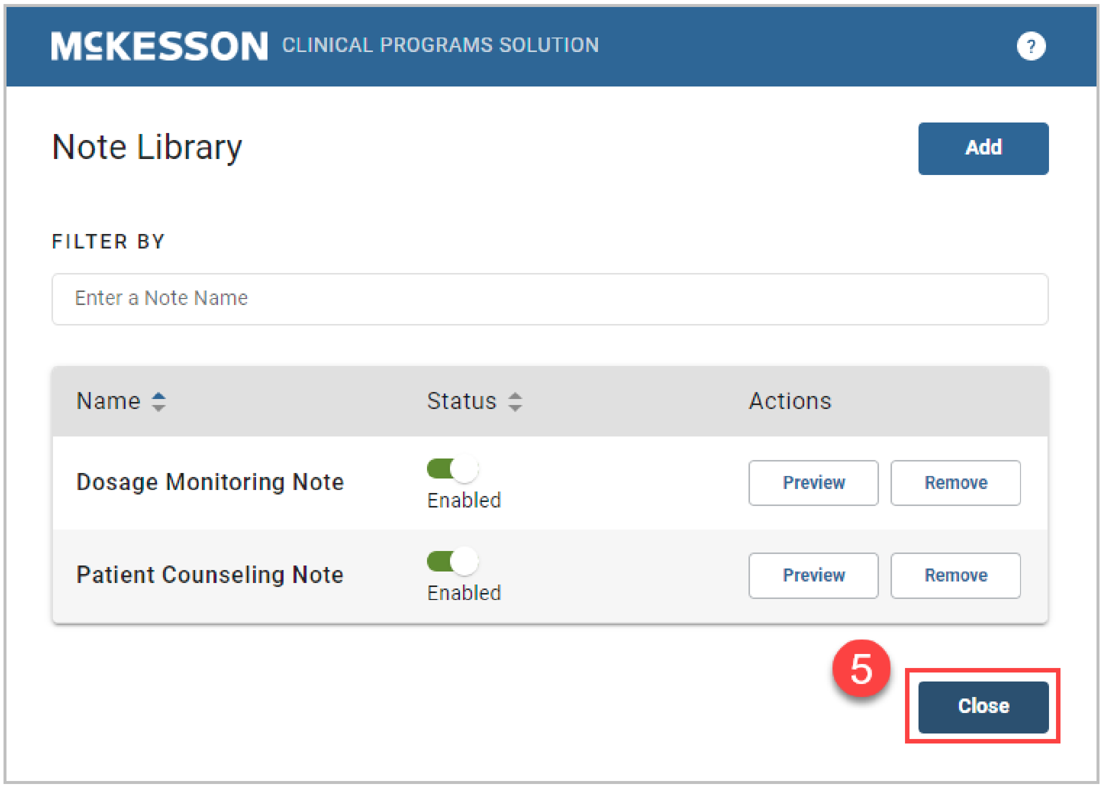
2. Select the **Preview** button next to the note you want to edit and the **Note Preview** pop-up displays.



3. On the pop-up window, select the **Edit** button and the **Note Builder** displays.



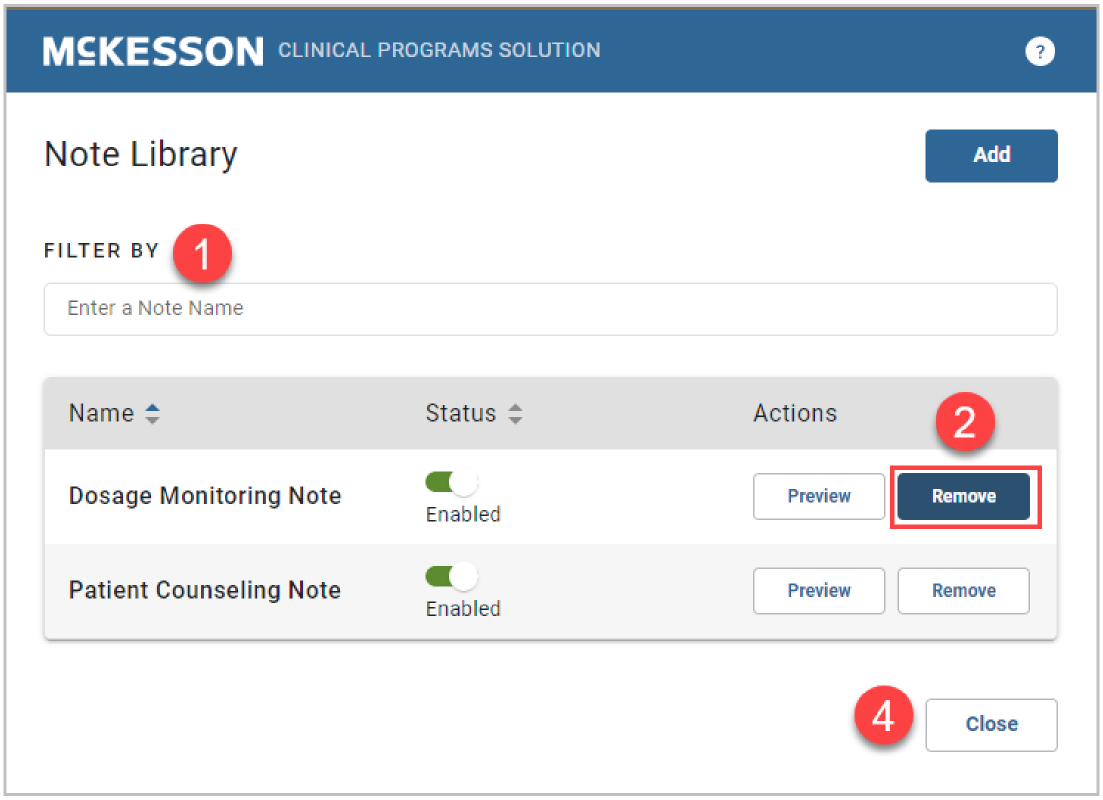
4. When you are done editing the note select the **Save** button, the **Note Builder** closes and the **Note Library** displays again.



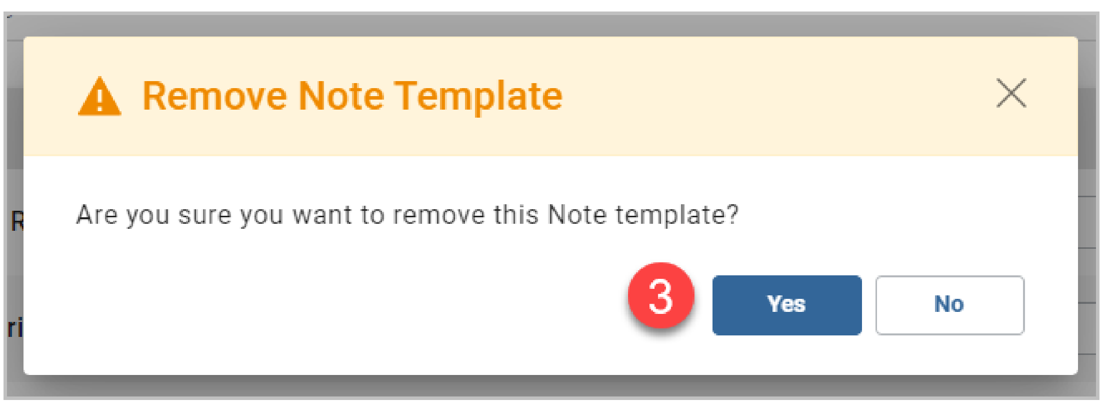
5. Select the **Close** button to close the window and go back to the **CPS Program Builder**.

Removing a Note

To remove a note, navigate to the **Note Library** window.



1. Type the group name into the **Filter By** text box to filter by note name. 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 note you want to remove.



3. Select the **Yes** button in the **Remove Note Template** confirmation pop-up to remove the field, or select the **No** button to cancel the removal.

4. Select the **Close** button to close the window and go back to the **CPS Program Builder**.

Chapter 7: Patient Profile Configuration

The standard fields that display within the **Patient Profile** can be customized to meet your pharmacy's needs. These fields can be leveraged for frequently captured values and, by default include:

- Systolic Blood Pressure
- Diastolic Blood Pressure
- Pulse Rate
- Fasting Glucose mg/dl
- Postprandial Glucose mg/dl
- A1C mg/dl
- LDL Cholesterol mg/dl
- HDL Cholesterol mg/dl
- Triglycerides mg/dl
- Total Cholesterol mg/dl
- BMI

Steps for Configuring the Patient Profile

- "Adding/Hiding Fields from the Patient Profile" on the next page
  - "Moving Fields Between the Available Fields and Selected Fields Columns" on page 113
  - "Changing the Order of the Fields" on page 114
- "Creating Custom Standard Fields" on page 115
  - "Configuring a Numeric Custom Standard Field" on page 116
  - "Configuring a Text Custom Standard Field" on page 117
  - "Configuring a Phone Number Custom Standard Field" on page 118
  - "Configuring a Date Custom Standard Field" on page 118
  - "Configuring a Drop-down Custom Standard Field" on page 119
- "Editing Custom Standard Fields" on page 120
- "Removing Custom Standard Fields" on page 122

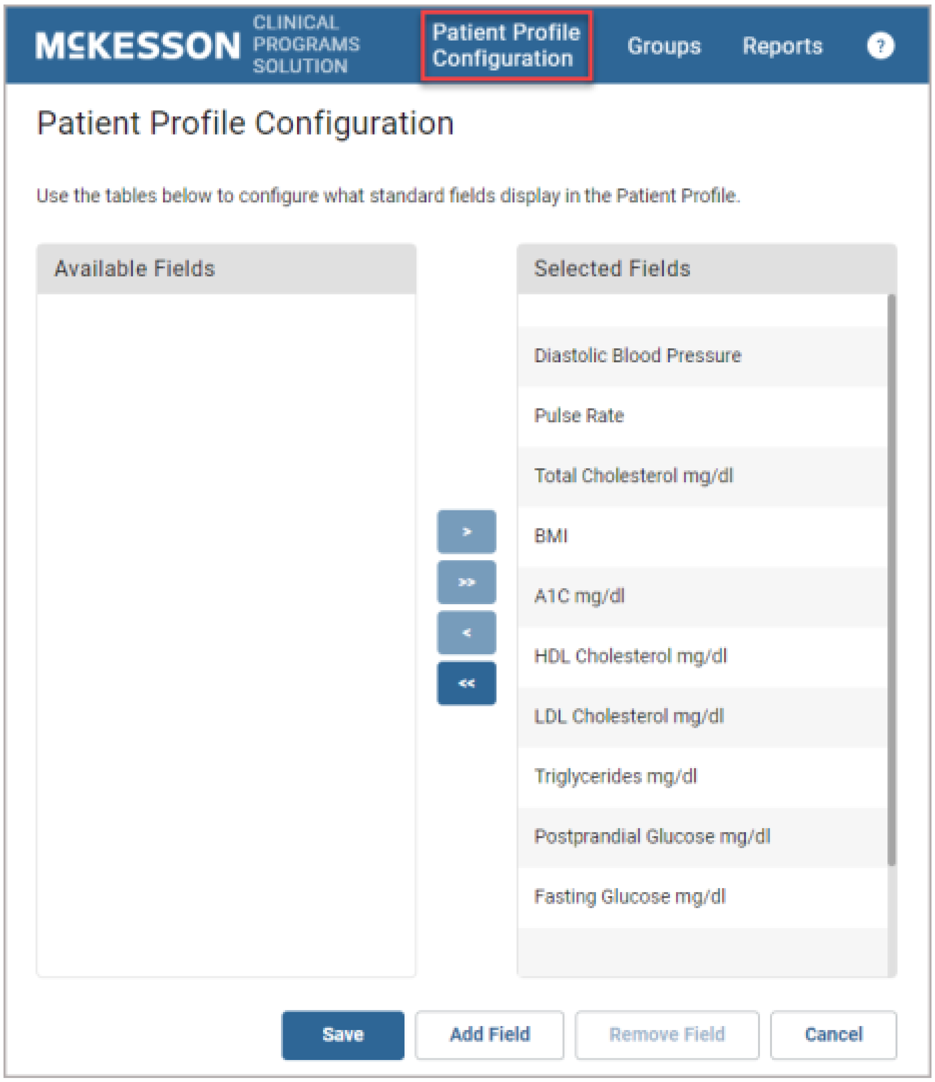
- "Saving the Patient Profile Configuration" on page 125

Adding/Hiding Fields from the Patient Profile

To Access **Patient Profile Configuration**, Navigate to **CPS Program Admin.**

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

Select the **Patient Profile Configuration** option.

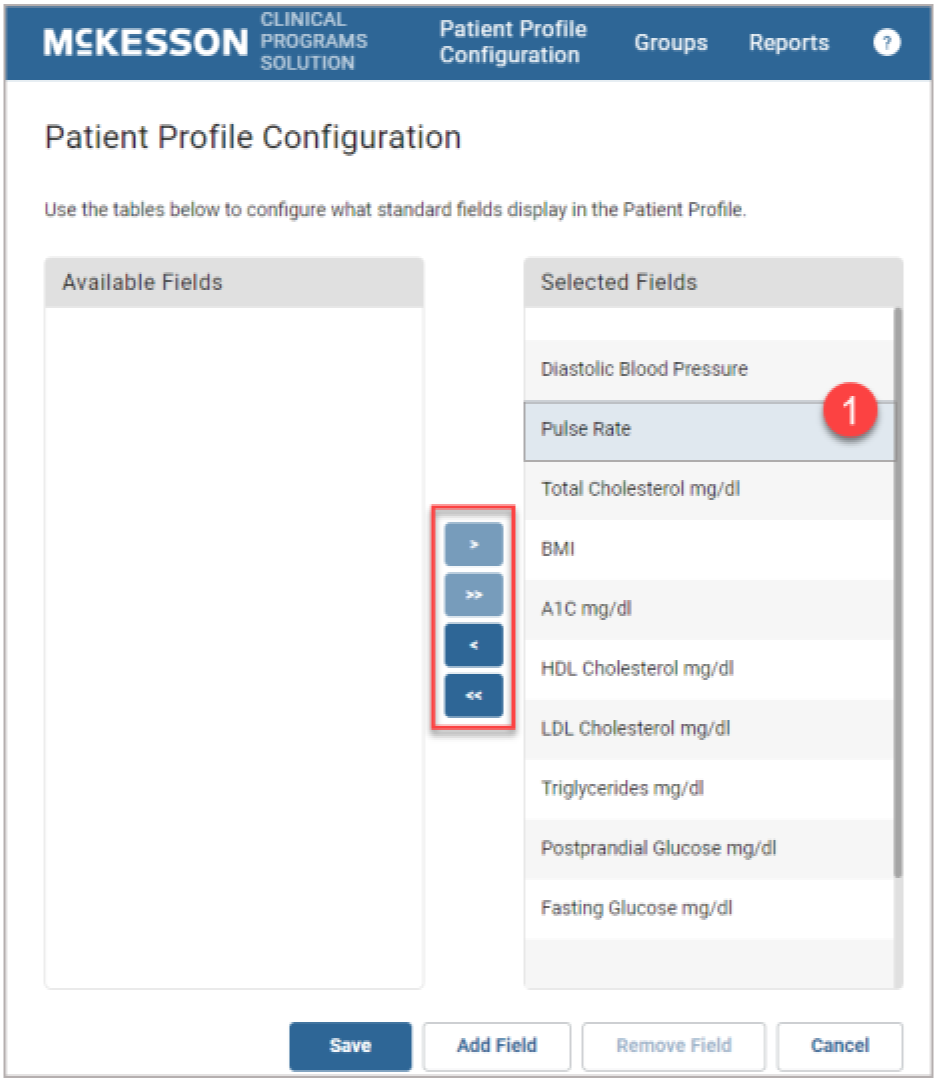


The **Patient Profile Configuration** window contains two columns:

- **Available Fields**: This column lists all available fields that are not currently displayed in the **Patient Profile**.

- **Selected Fields**: This column lists all fields that are currently displayed in the **Patient Profile**. Within the **Patient Profile**, fields will display left-to-right, top-down in the order specified within this column.

Moving Fields Between the Available Fields and Selected Fields Columns



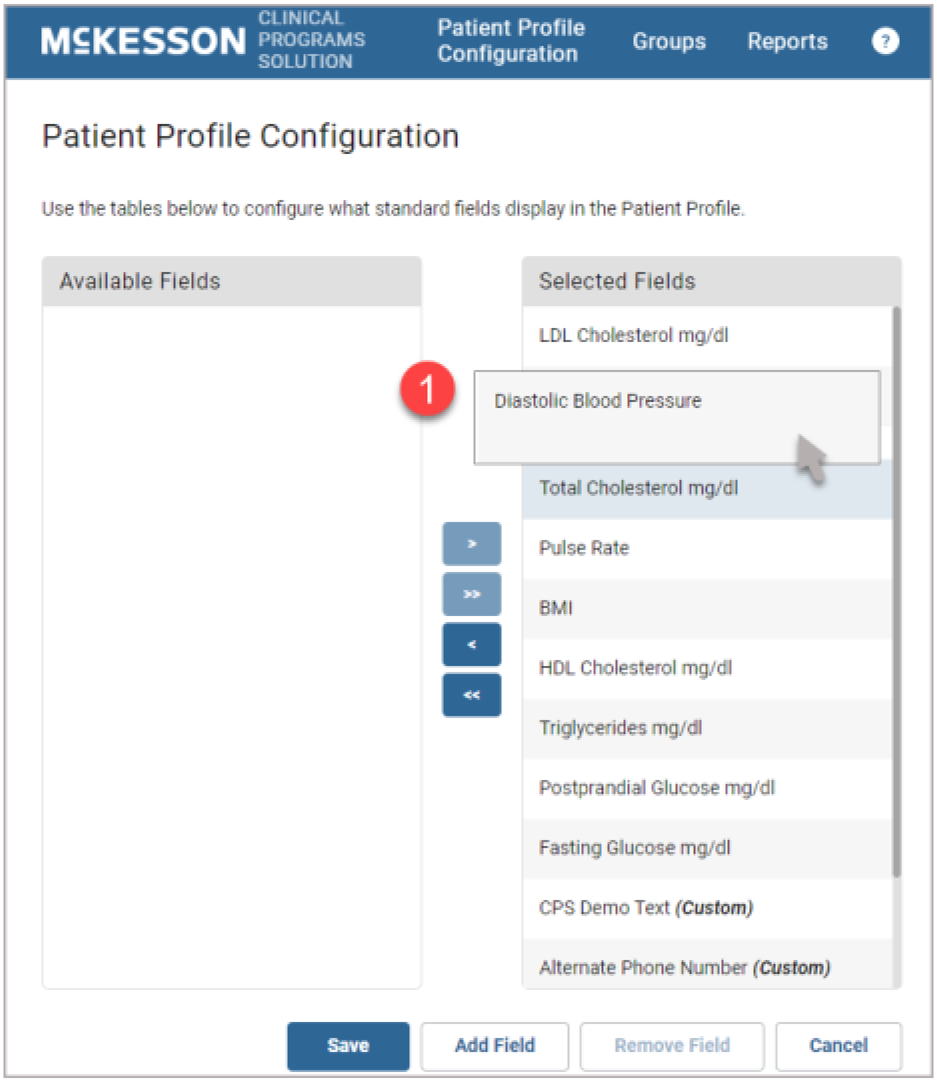
1. Select the field that you want to move. Next, select the arrow button corresponding to the action you want to take:

   - Select the right single arrow button ( ) to move the selected field from the **Available Fields** column to the **Selected Fields** column.

   - Select the left single arrow button ( ) to move the selected field from the **Selected Fields** column to the **Available Fields** column.

- Select the right double arrow button (>>) to move all fields from the **Available Fields** column to the **Selected Fields** column.
- Select the left double arrow button (<<) to move all fields from the **Selected Fields** column to the **Available Fields** column.

Changing the Order of the Fields

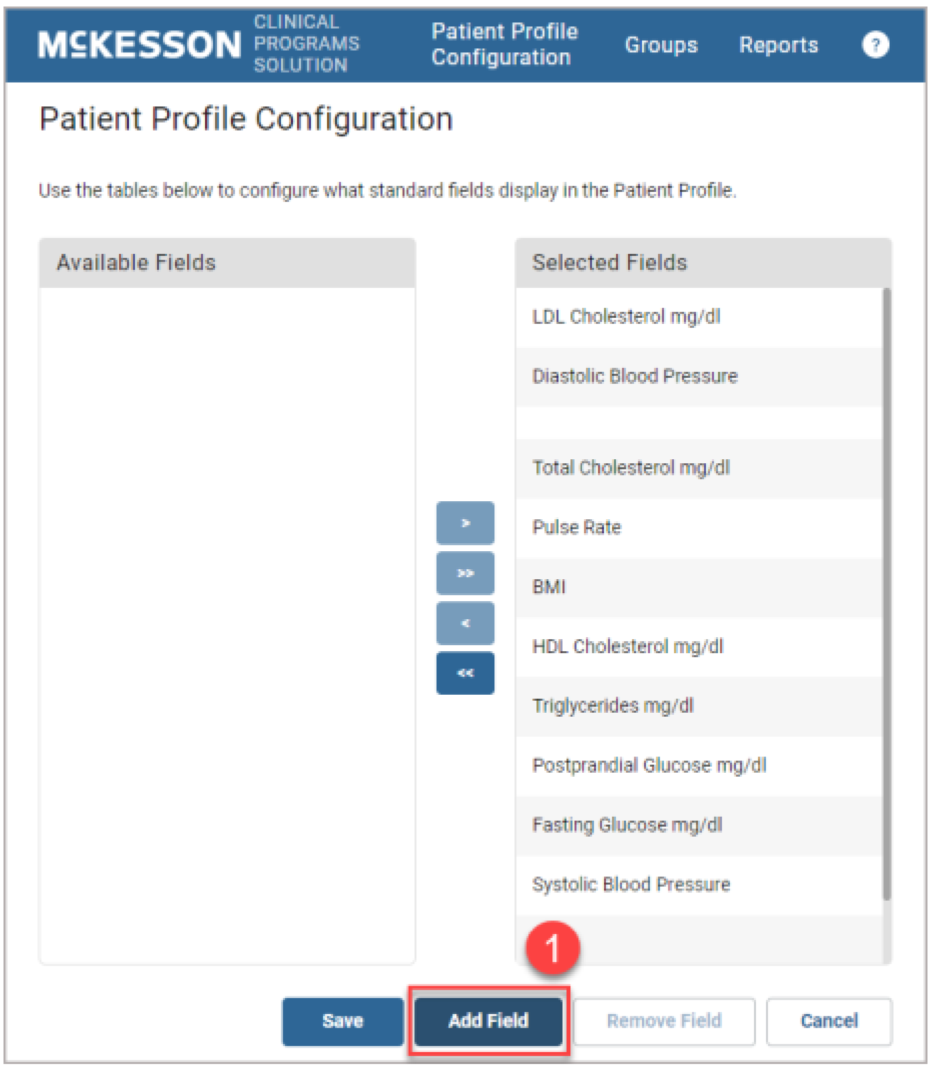


1. Select the field that you want to move. You can only move 1 field at a time. Drag the field to the desired location.

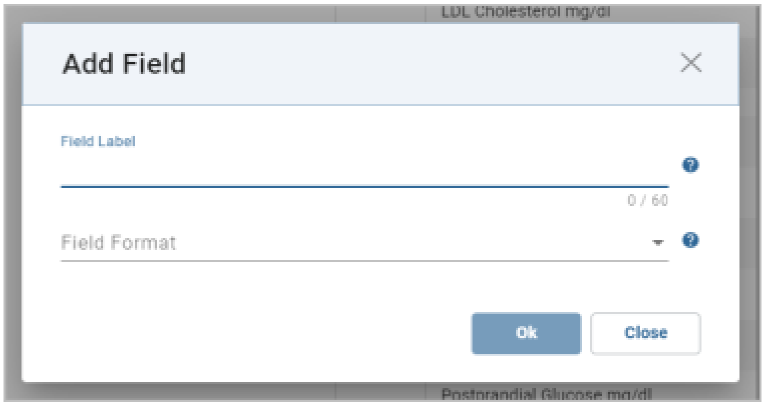
Creating Custom Standard Fields

In addition to the default fields, you can create **Custom Standard Fields** to display in the **Patient Profile**. Similar to the default standard fields, when a value is entered for a **Custom Standard Field** via the **Patient Profile**, the value will be saved to the **Patient Health Values** section within the **Patient Profile**.

> **Important:**
> Data Filters can be configured on **Custom Standard Fields** for Patient Enrollment Alerts or Program Alerts. Please refer to "Configuring Clinical Programs" on page 52, "Setting Up Data Filters for Program Enrollments" on page 54 and "Setting Up Data Filter, Bulk Alert and Follow-Ups for Program Alerts" on page 73, for more information on setting up Data Filters.



1. Select the **Add Field** button and the **Add Field** pop-up will display.



2. In **Field Label** enter the text that will identify the field within the **Patient Profile**. The **Field Label** supports up to 60 characters.

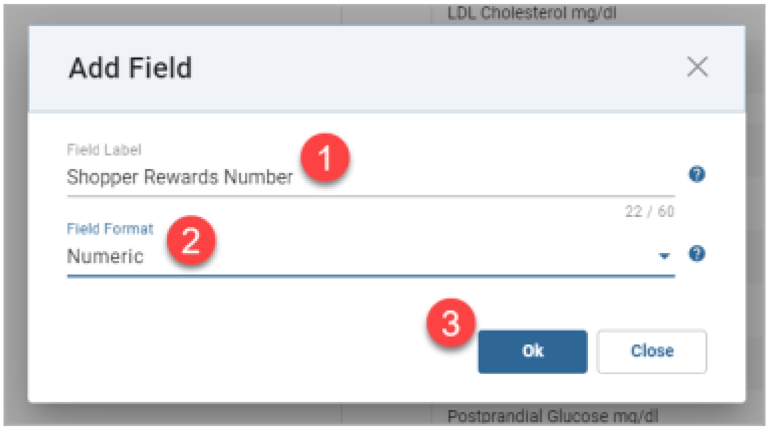
3. Use the **Field Format** drop-down to specify the expected input of the new field. Options include:

   - **Numeric**
   - **Text**
   - **Phone Number**
   - **Date**
   - **Drop-down**

Configuring a Numeric Custom Standard Field

A **Numeric Custom Standard Field** allows you to enter a maximum of 10 numeric characters, including commas and decimal points, when populating the field using the **Patient Profile**.

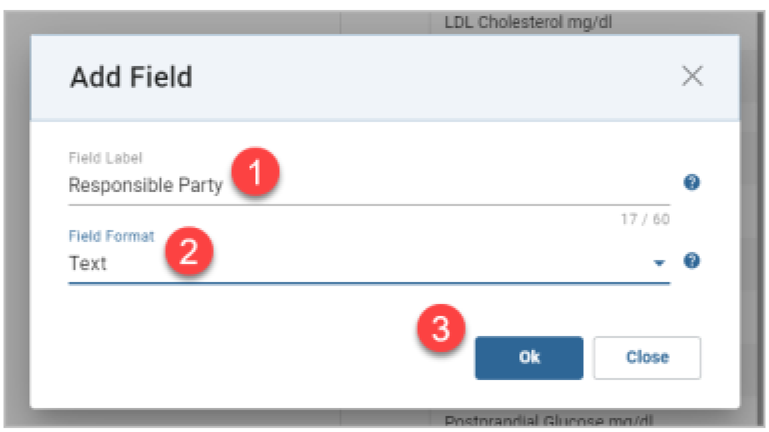
Note:
You will not be able to enter alpha characters in a **Numeric Custom Standard Field**.



1. In **Field Label** enter the text that will identify the field within the **Patient Profile**. The **Field Label** supports up to 60 characters.
2. Select **Numeric** from the **Field Format** drop-down.
3. Select the **Ok** button to add the field to the **Available Fields** column and return to **Patient Profile Configuration**.

Configuring a Text Custom Standard Field

A **Text Custom Standard Field** allows you to enter a maximum of 100 alpha, numeric, and/or special characters when populating the field using the **Patient Profile**.



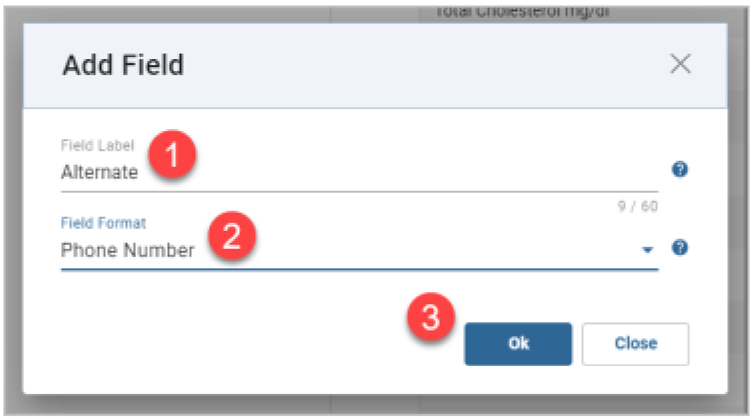
1. In **Field Label** enter the text that will identify the field within the **Patient Profile**. The **Field Label** supports up to 60 characters.
2. Select **Text** from the **Field Format** drop-down.
3. Select the **Ok** button to add the field to the **Available Fields** column and return to **Patient Profile**

Configuration.

Configuring a Phone Number Custom Standard Field

A **Phone Number Custom Standard Field** requires you to enter 10 numeric characters when populating the field using the **Patient Profile**.

Note:
Phone Number Custom Standard Fields will automatically be formatted in (xxx) xxx-xxxx format.

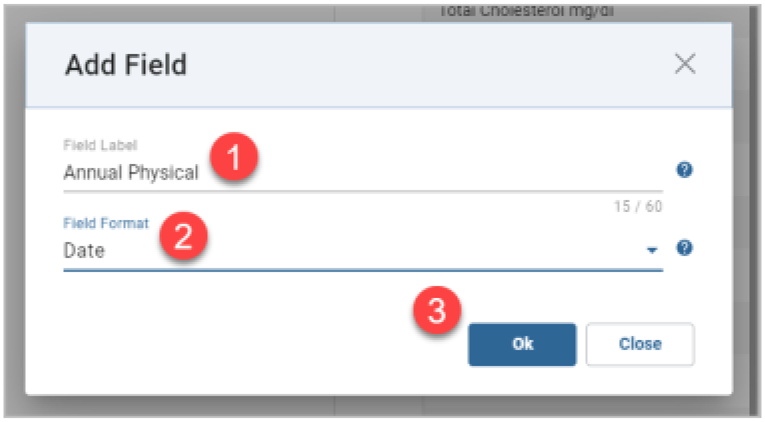


1. In **Field Label** enter the text that will identify the field within the **Patient Profile**. The **Field Label** supports up to 60 characters.
2. Select **Phone Number** from the **Field Format** drop-down.
3. Select the **Ok** button to add the field to the **Available Fields** column and return to **Patient Profile Configuration**.

Configuring a Date Custom Standard Field

A **Date Custom Standard Field** requires you to enter 8 numeric characters or use a pop-up calendar to search for and select the desired date when populating the field using the **Patient Profile**.

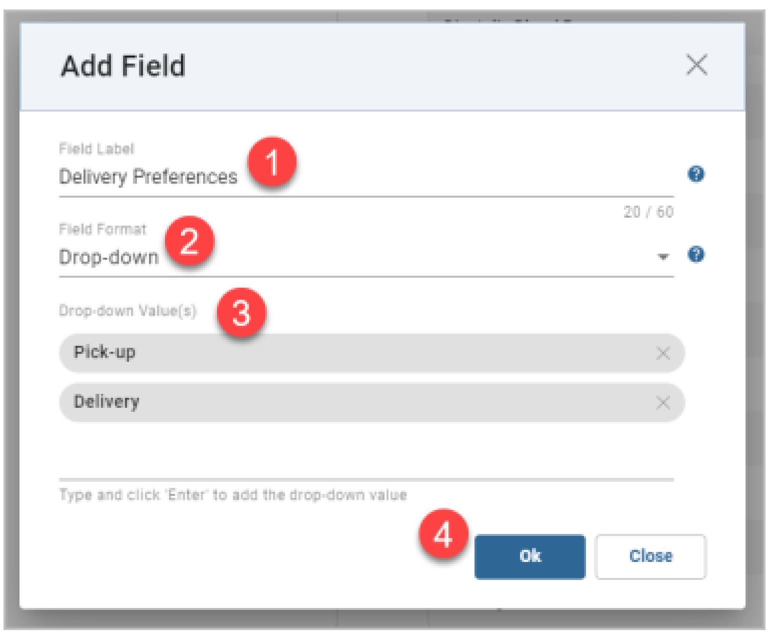
Note:
Date Custom Standard Fields will automatically be formatted in mm/dd/yyyy format.



1. In **Field Label** enter the text that will identify the field within the **Patient Profile**. The **Field Label** supports up to 60 characters.
2. Select **Date** from the **Field Format** drop-down.
3. Select the **Ok** button to add the field to the **Available Fields** column and return to **Patient Profile Configuration**.

Configuring a Drop-down Custom Standard Field

A **Drop-down Custom Standard Field** supports creation of custom drop-down lists for you to select from within the **Patient Profile**.



1. In **Field Label** enter the text that will identify the field within the **Patient Profile**. The **Field Label** supports up to 60 characters.
2. Select **Drop-down** from the **Field Format** drop-down.
3. When creating a **Drop-down Custom Standard Field**, you will be required to define the list of values for the field. To add a drop-down value to the list, select the **Drop-down Value(s)** field and enter the value. Once the value has been inputted, select **Enter** to add the value to the list.

   A new line will appear in the **Drop-down Value(s)** field, allowing you to add another value if needed. Continue to add values to the list until all desired values have been added.

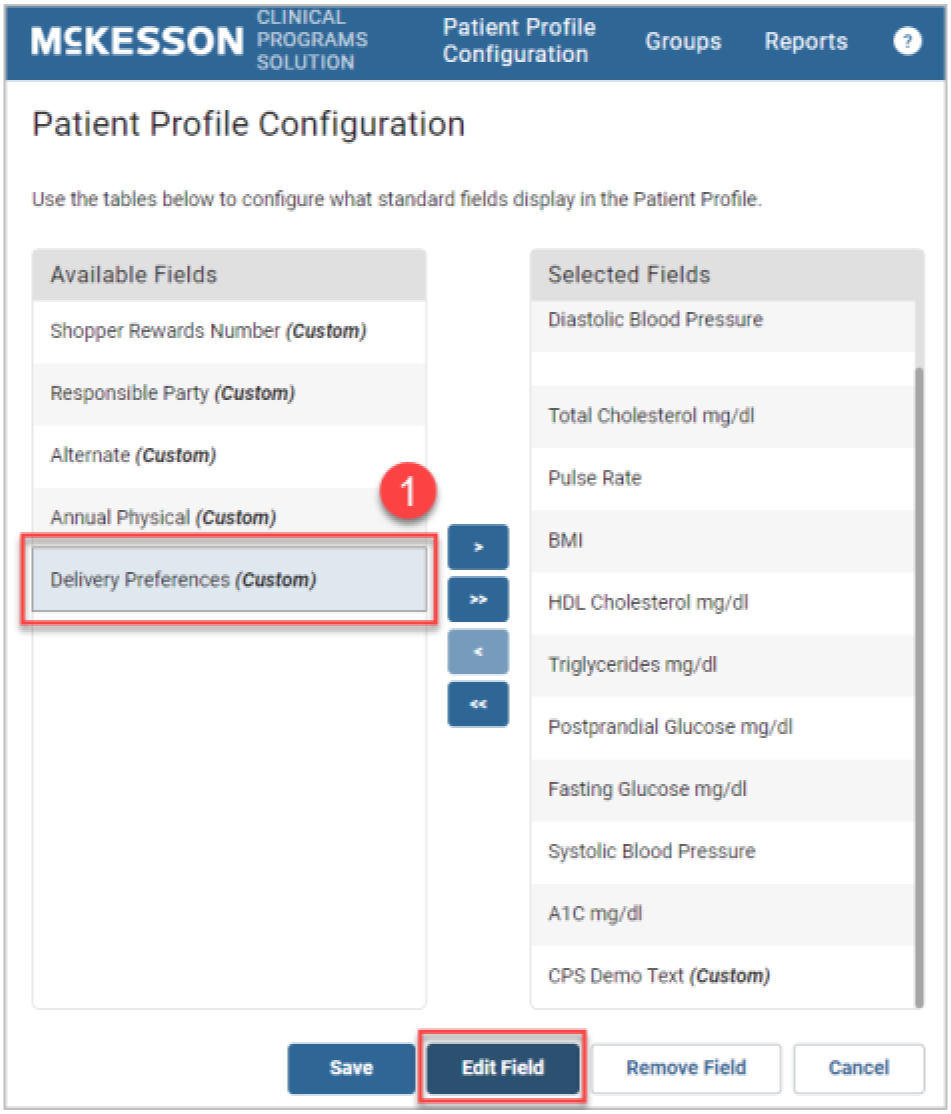
   The values will display in the **Drop-down Custom Standard Field** in the order in which they are listed. To change the order, simply drag and drop the values into the desired order.

   Note:
   You can delete a value by selecting the **X** ( ) for that value.

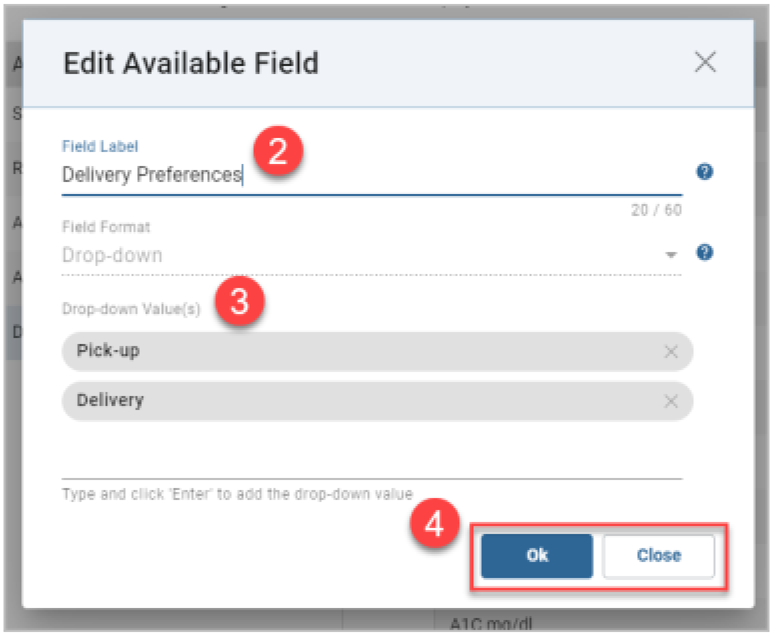
4. Select the **Ok** button to add the field to the **Available Fields** column and return to **Patient Profile Configuration**.

Editing Custom Standard Fields

Custom Standard Fields that display within the **Patient Profile** can be edited at any time.



1. Select a **Custom Standard Field**. The selected field can be in either the **Available Fields** or **Selected Fields** column. The **Add Field** button will change to **Edit Field.**



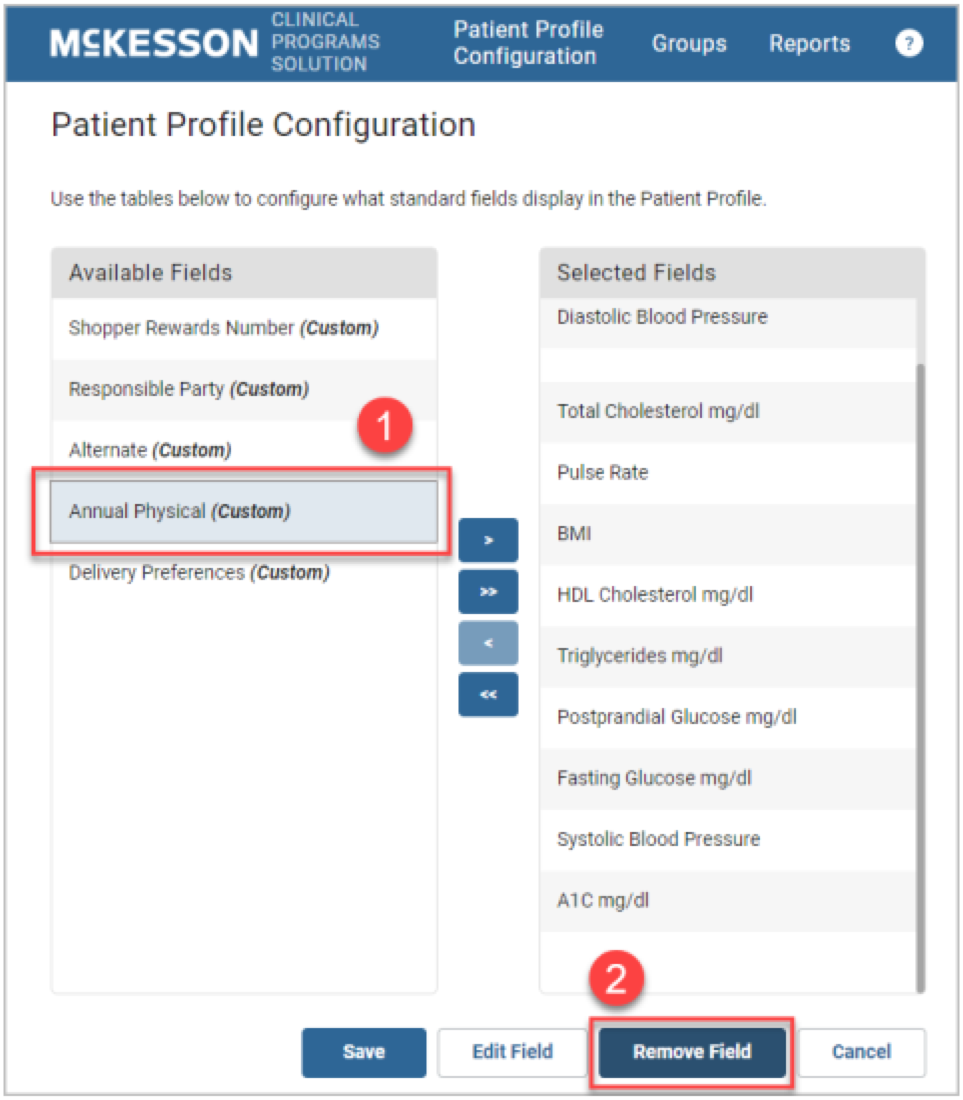
2. Edit the **Field Label** as needed.
3. When editing a **Drop-down Custom Standard Field**, you can also edit the list of drop-down values available for selection in the **Patient Profile**. You cannot edit the text that displays for individual values. If a value's text needs to be edited, first delete the value by selecting the **X** ( ) associated with that drop-down value, and then add a new value to the list with the updated text.

> **Note:**
> When a drop-down value is removed from the list, the value will no longer be available for selection within the **Patient Profile**. If the value is already selected for a patient, however, the value will remain visible in the **Patient Profile** until a new value is selected.

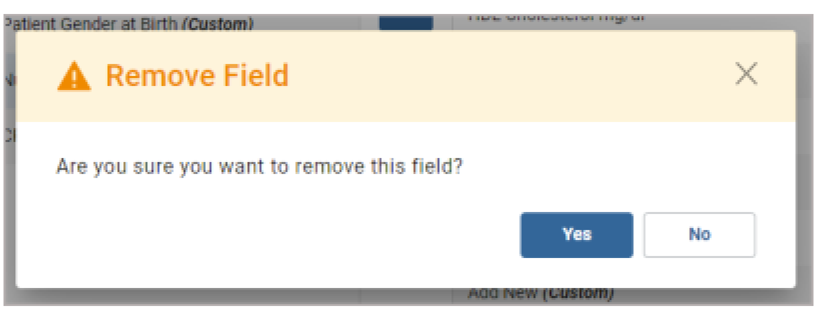
4. Select the **Ok** button to update the **Custom Standard Field** and return to **Patient Profile Configuration**, or the **Close** button to discard your changes.

Removing Custom Standard Fields

Custom Standard Fields that display within the **Patient Profile** can be removed at any time.

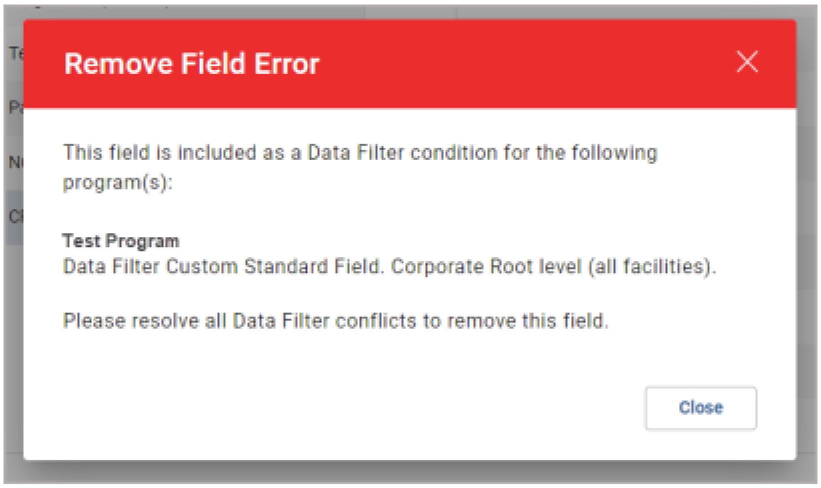


1. Select the desired **Custom Standard Field** that you want to remove from the **Available Fields** column.
2. With the **Custom Standard Field** selected, select the **Remove Field** button.

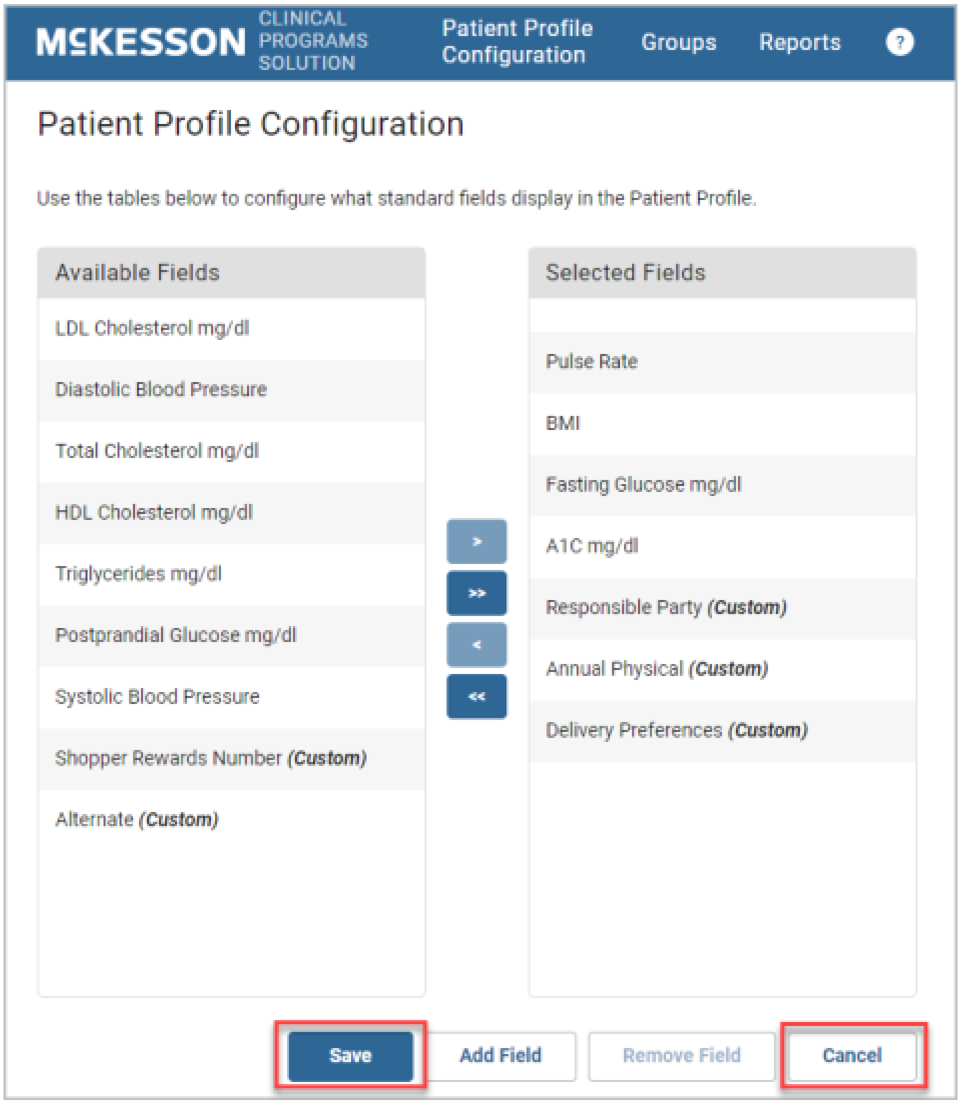


3. Select the **Yes** button in the **Remove Field** confirmation pop-up to remove the field, or select the **No** button to cancel the removal.

Important:
If the **Custom Standard Field** you want to remove is included as a Data Filter attribute for Patient Enrollment Alerts or Program Alerts, the field cannot be removed and you will receive an error message.



Saving the Patient Profile Configuration



When your configuration changes are complete, save your changes by selecting the **Save** button at the bottom of the **Patient Profile Configuration** window, or **Cancel** to discard your changes.

Please refer to "Viewing the CPS Patient Profile" on page 194 for more information on using standard fields in the **Patient Profile**.

Chapter 8: 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

-

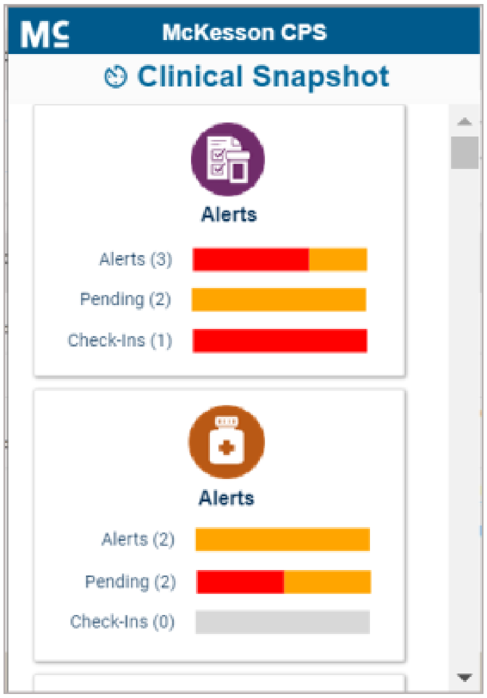
Viewing Programs and Alerts

Viewing Enabled Programs in Clinical Snapshot

McKesson CPS

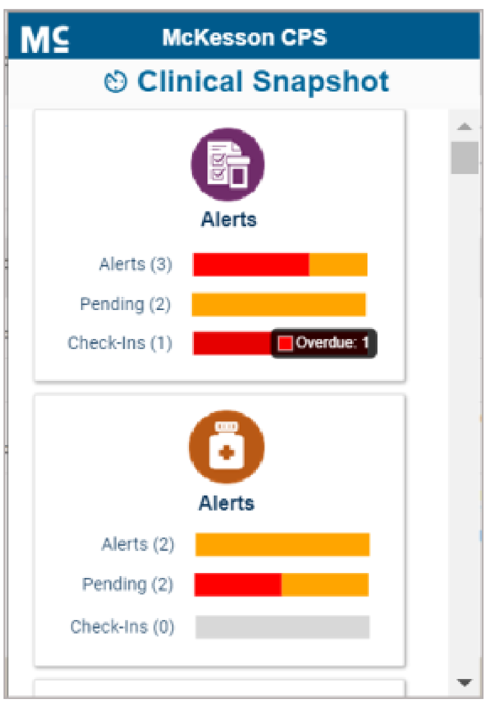
When a patient is not in context in the Pharmacy Management System, the Clinical Snapshot will display within the **Clinical App**. The Clinical Snapshot provides you with a way to quickly check the status of your Programs at a high level. When a Vendor or Self-Directed Program is enabled in the logged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

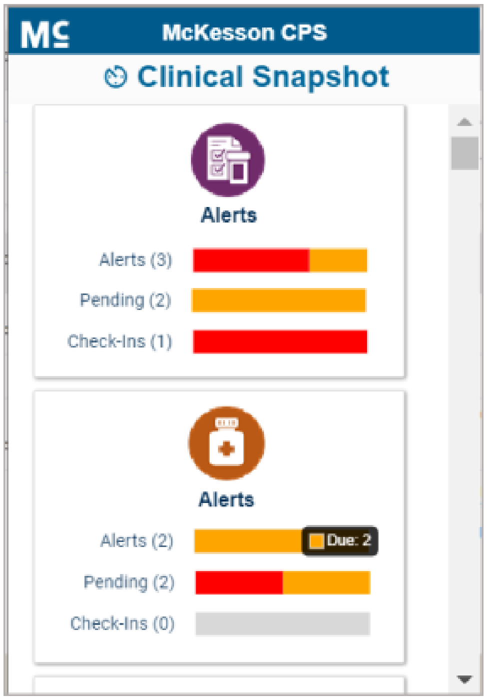


Note:
If no Programs are enabled in the logged in store, the Clinical Snapshot will display the following message: “There are no programs enabled in this facility.”

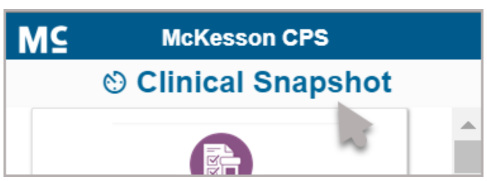
To provide insight into a Program's overall status, Alerts, Pending Alerts and/or Check-Ins with a due date in the past will display as red within the accompanying graph. And when you hover over the red section, the total count of past due Alerts, Pending Alerts or Check-Ins will display.



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.

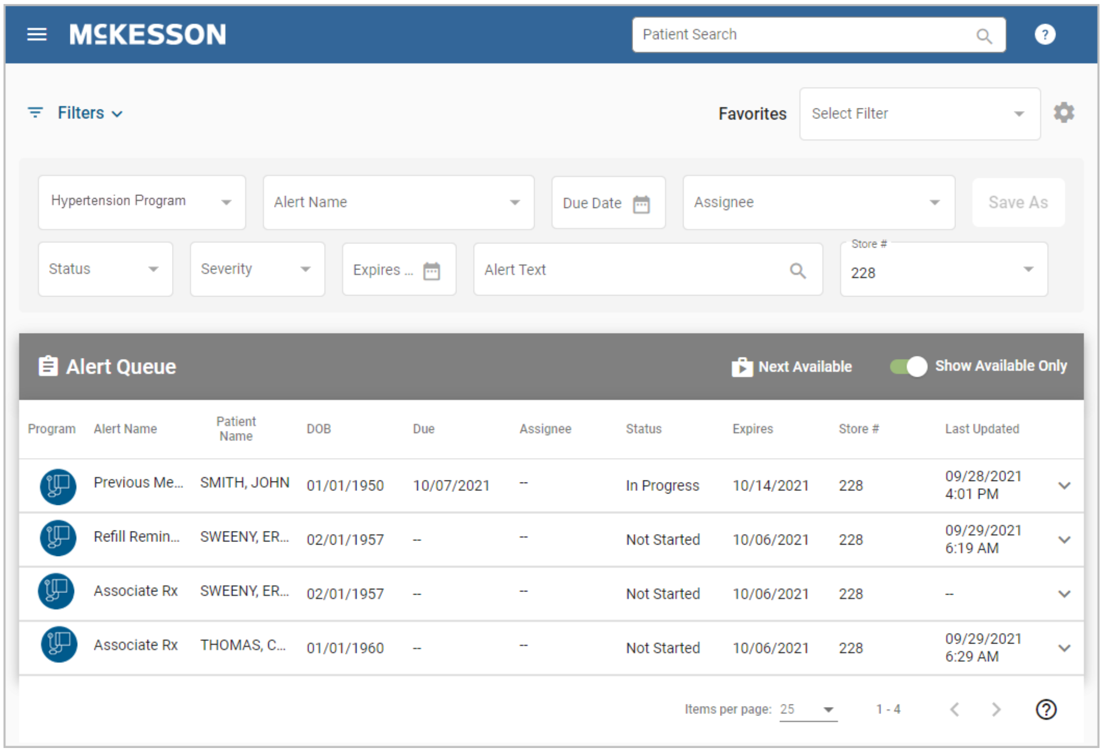


To refresh the Overdue and Due counts, select the Clinical Snapshot title bar.



Accessing the Program's Alerts

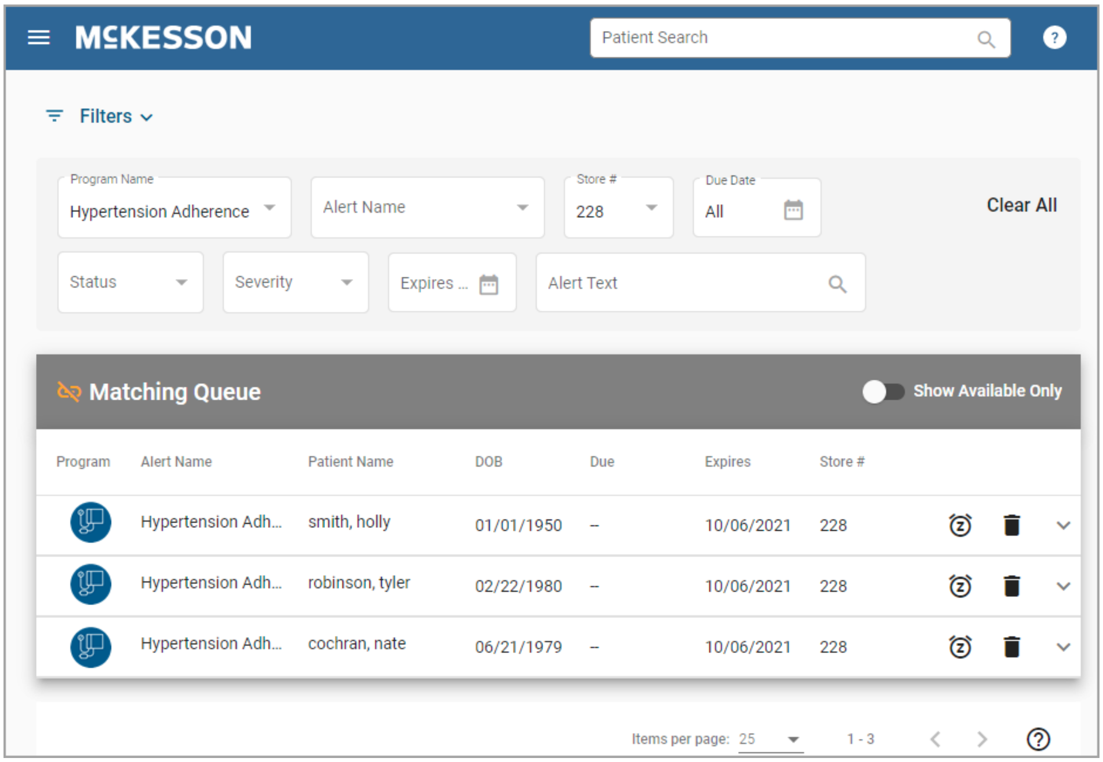
When you select a Program's Alerts count or accompanying graph within the Clinical Snapshot, the **Alert Queue** will open in a new window and the **Alert Queue** will be filtered for the selected Program and logged in store.



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

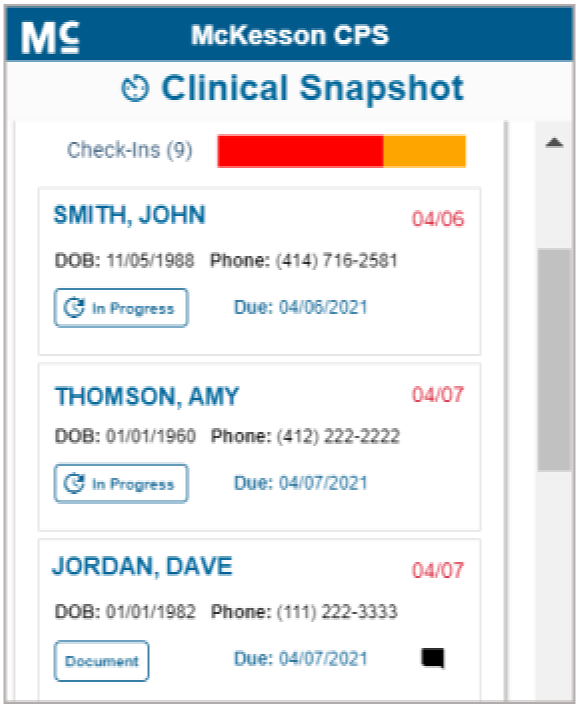
Accessing the Program's Pending Alerts

When you select a Program's Pending count or accompanying graph within the Clinical Snapshot, the **Alert 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.



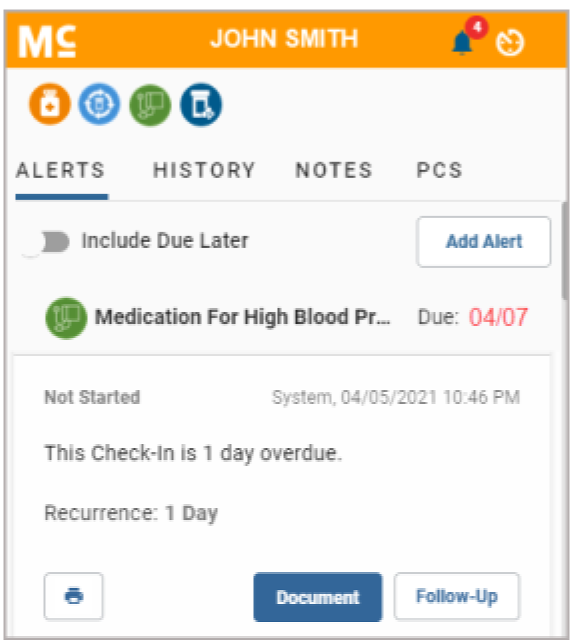
Accessing the Check-In Program-Level View

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.



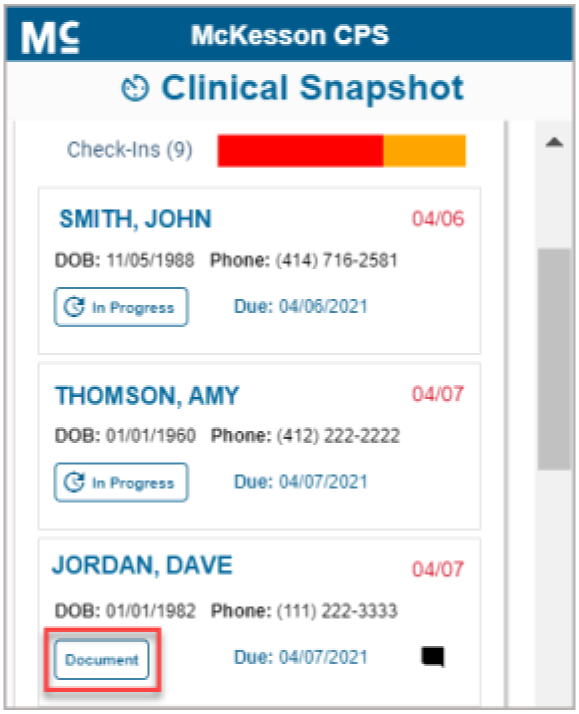
Note:
At most, 50 Check-In notifications will display in the Check-In Program-Level view.

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 139 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

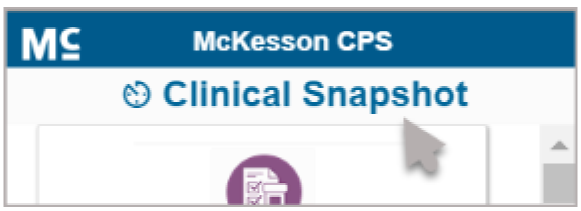
You can modify a Check-In notification's due date via the **Due** field directly from the Check-In Program-Level view.

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.



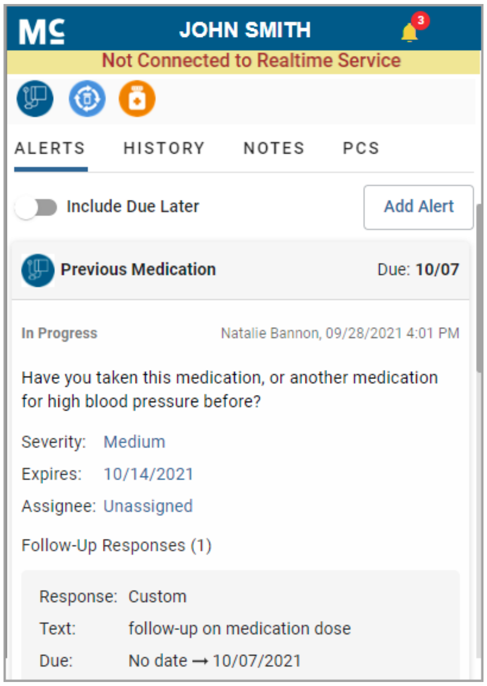
Viewing a Patient's CPS Alerts in the Clinical App Using EnterpriseRx

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.

Realtime Service Notification

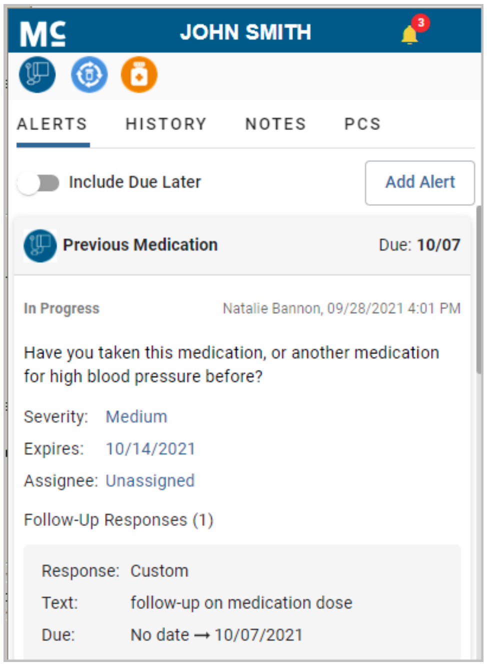
When you access the **Clinical App** and the Realtime Service is down, a notification displays at the top of the window. The service may be down due to an internet outage. The warning does not prevent users from using the software, however you will not see any updates in real-time from other users.



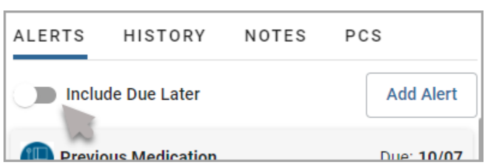
> **Note:**
> When the Realtime Service is down the notification also displays in the other windows of the software.

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.

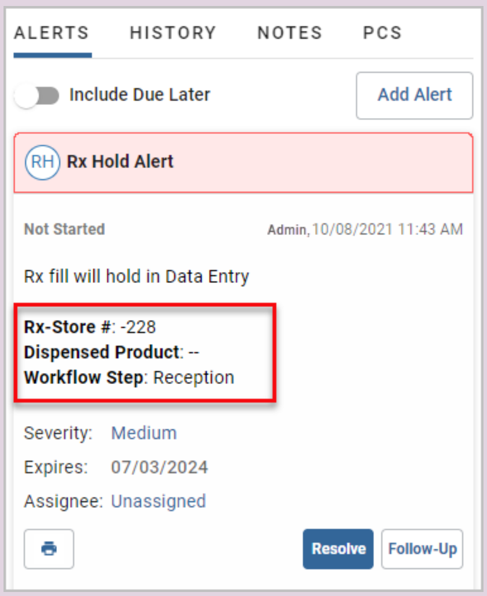


Alerts will display within the **Alerts** tab based on the following sort order:

1. Ad hoc Alerts (Standard and Rx Hold) created for the patient in context during the current working session.
2. Rx Hold Alerts for the patient in context for the current Rx fill – these Alerts have a red header.
3. Rx Hold Alerts for the patient in context for other Rx fills.
4. All remaining Alerts (Enrollment, Check-In, Standard, Refill Reminder, or Vendor) for the patient in context.
5. If there are multiple Alerts within a group, the sort order within the group will be as follows:

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

Tip:
While working in your pharmacy management system with a patient and their Rx has an Rx Hold Alert, the Alert will appear with a red header. Which makes the Alert stand out more to the user, as shown in the image below. Additional information will also display in the Alert, for the Rx: **Rx-Store #**, **Dispensed Product**, and **Workflow Step**.



Important:
Refill Reminder Alerts and Rx Hold Alerts are only available with the EnterpriseRx Specialty Solution (ESS). Please contact your Account Executive for more information.

Actions You Can Take in the Alerts Tab

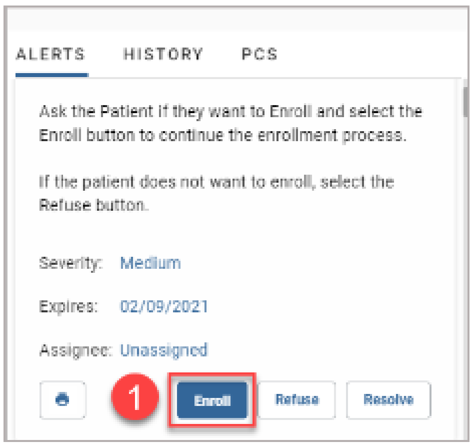
You can take the following actions to manage Alerts:

- "Enrolling a Patient" on the next page
- "Refusing Patient Enrollment" on page 139
- "Accessing and Completing an Alert’s Associated Questionnaire " on page 139
- "Adding Follow-Ups" on page 141

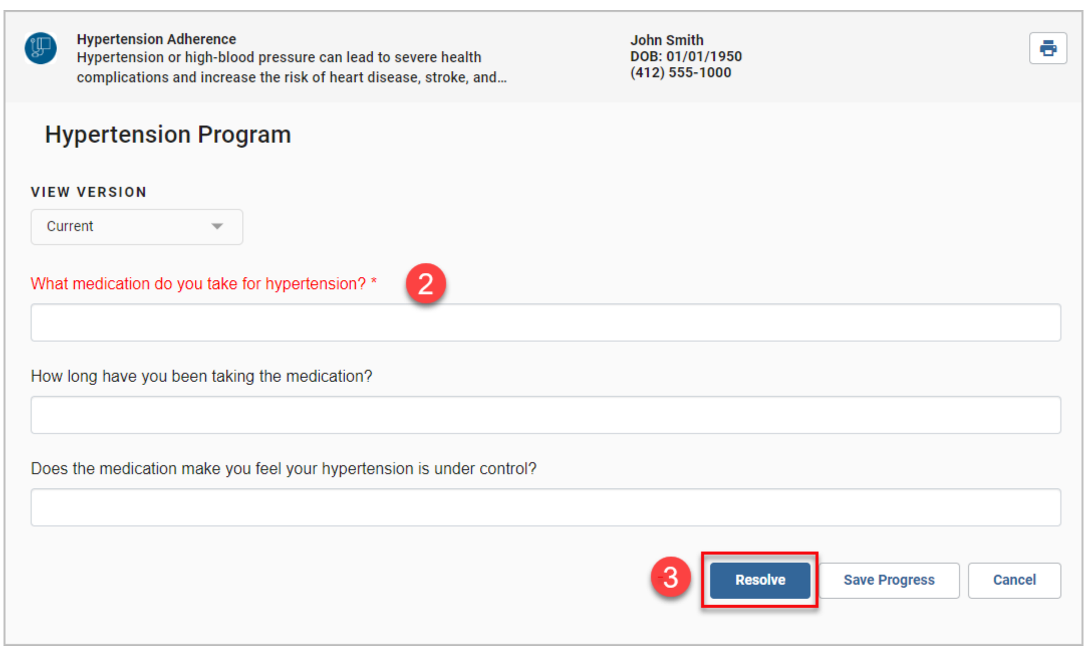
- "Changing an Alert’s Severity, Expiration Date or Assignee" on page 145
- "Adding an Alert" on page 151
- "Resolving an Alert" on page 153
- "Printing an Alert" on page 154

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.

4. 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.

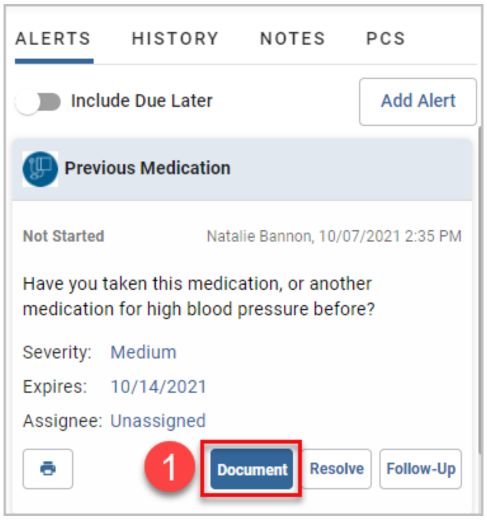
Note:
Enrolling a patient in a Program will override any setting in place in the Pharmacy Management System where the user has set a “Do Not Contact” flag for the patient.

Refusing Patient Enrollment

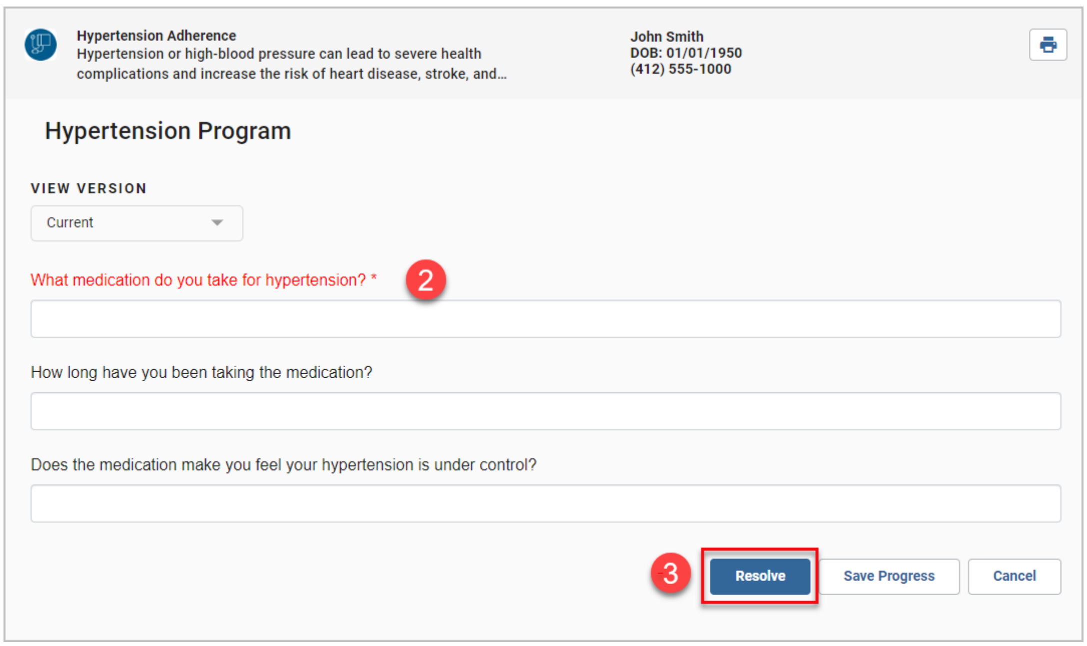
If the patient is asked about enrolling in the Program and they refuse, select the **Refuse** button. A new enrollment Alert will not be generated for this patient for this particular Program until the refusal time period set up in **CPS Program Admin** has been reached.

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.

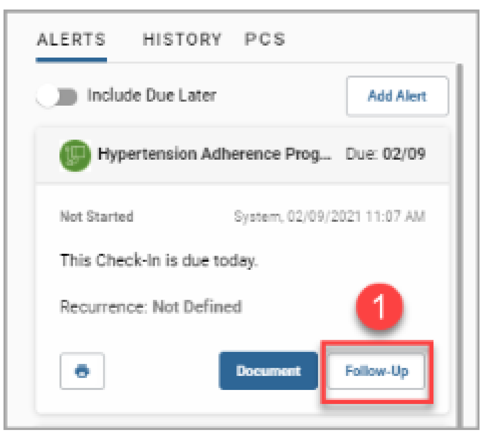
Additional actions available in a questionnaire are outlined in "Alert's Questionnaire" on page 202.

Adding Follow-Ups

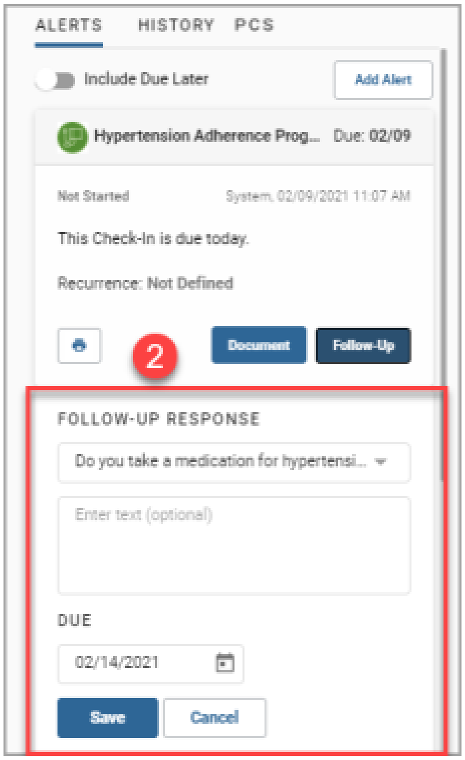
The **Follow-Up** button in an Alert allows you to leave a response to remind yourself, or someone else, to follow-up later. This may be useful in situations where you could not reach the patient and it is necessary for you to follow-up again sometime in the future. The **Follow-Up** button also allows 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 "Alert's Questionnaire" on page 202 for information about adding Follow-Ups from the questionnaire.

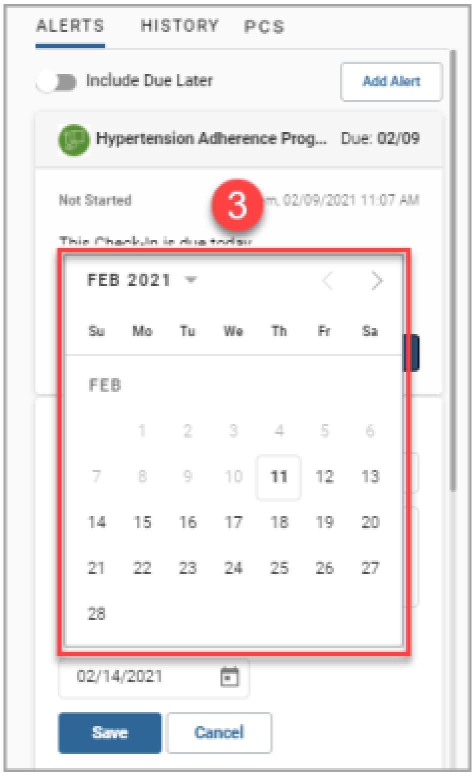
Follow the steps below for adding Follow-Ups:



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

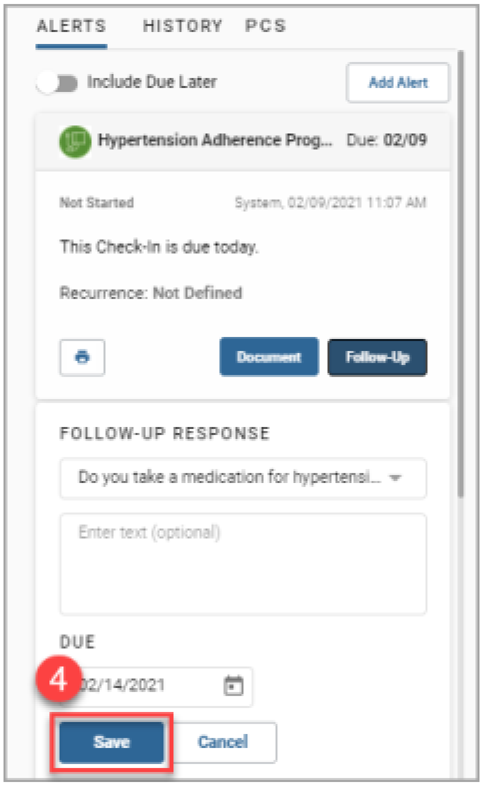


2. Enter the information for the Follow-Up. From the **Follow-Up Response** drop-down select a pre-defined response or select **Custom** to enter custom text. When a pre-defined response is selected, additional custom text can also be added to the Follow-Up. If there are no pre-defined responses for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



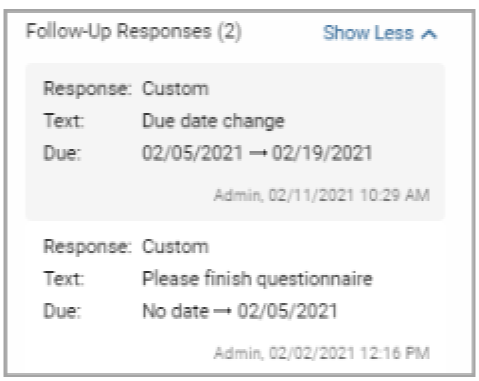
3. In the **Due** field either select the **Calendar** icon ( ) to use the pop-up calendar to select an updated due date or enter the updated due date directly into the **Due** field in mm/dd/yyyy format.

Note:
After an Alert's due date has been modified, the due date change will be reflected in the title bar of the 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.

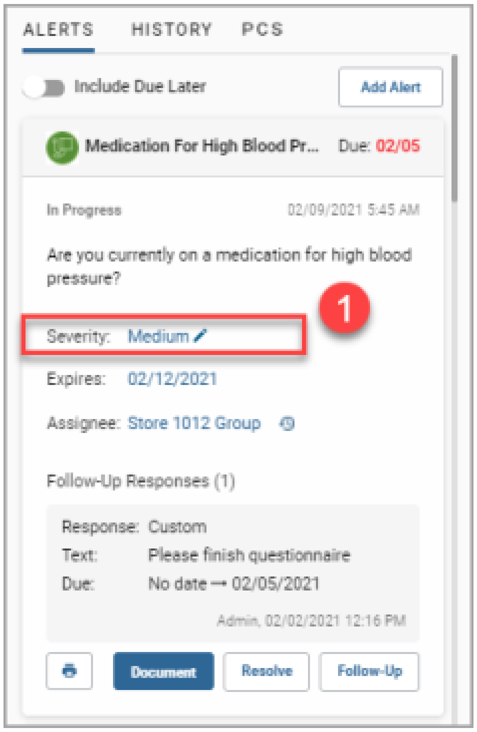
   The most recent Follow-Up Response displays within the Alert. You can select **Show More** to see any additional Follow-Up Responses. Select Show Less to collapse the responses.



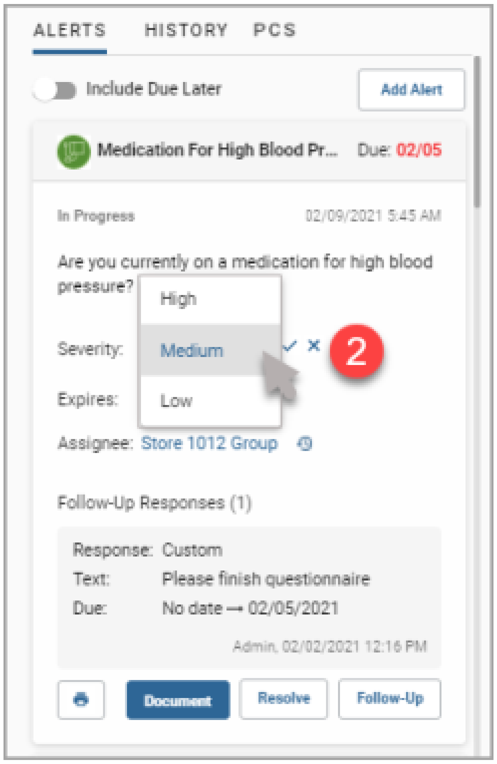
Changing an Alert's Severity, Expiration Date or Assignee

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

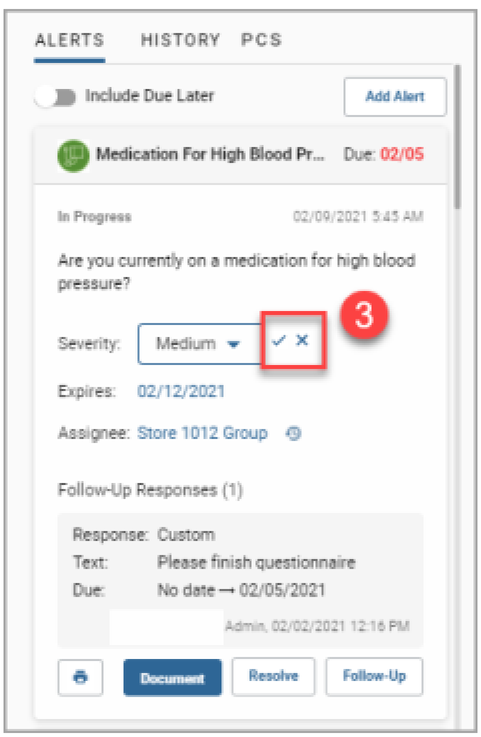
Editing an Alert's Severity



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.

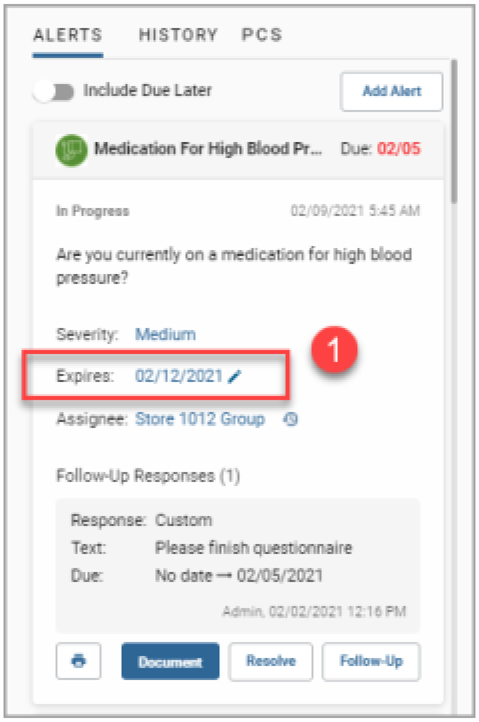


2. Select a new severity **High**, **Medium**, or **Low** from the drop-down.

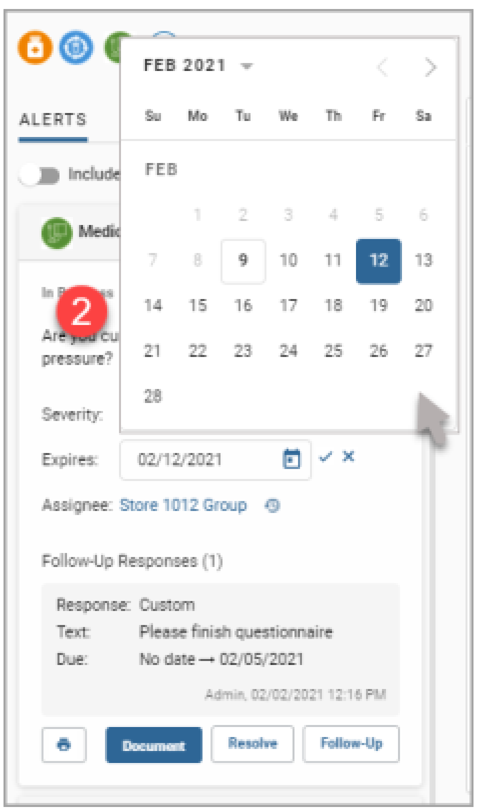


3. Select the **Check Mark** icon to save your change, or the **X** icon to cancel your change.

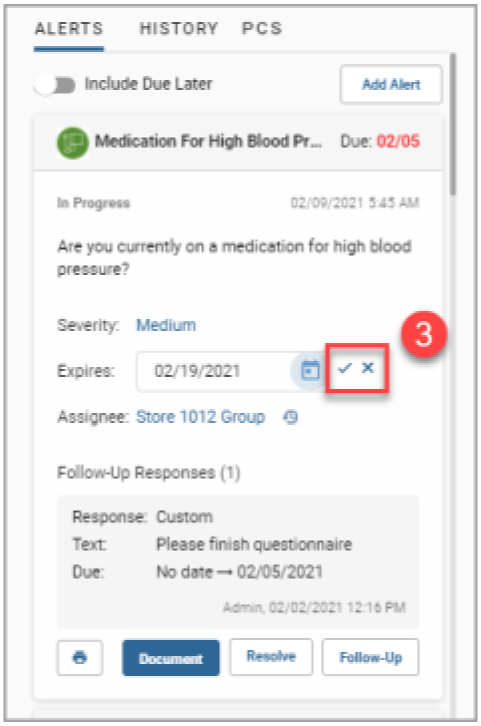
Editing an Alert's Expiration Date



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.

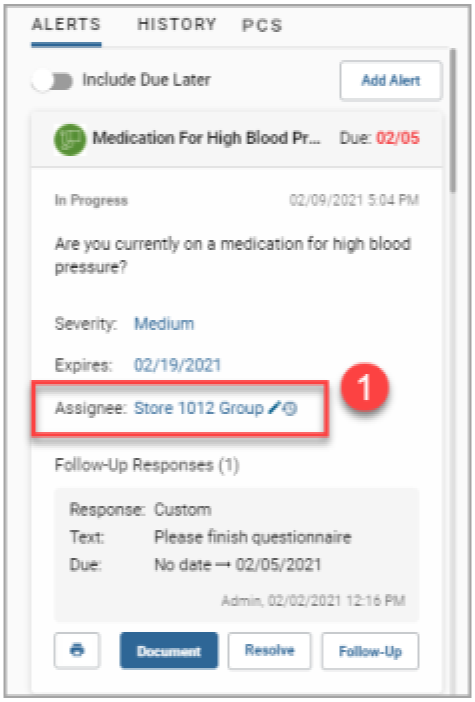


3. Select the **Check Mark** icon to save your change, or the **X** icon to cancel your change.

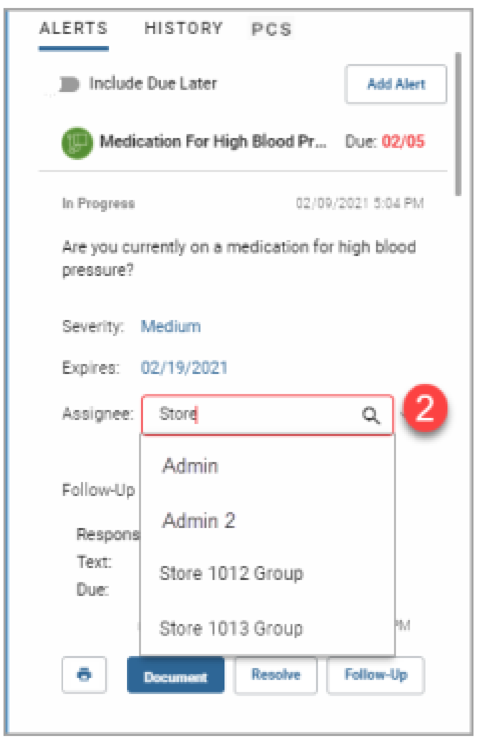
Editing an Alert's Assignee

You can assign an Alert to an individual or group.

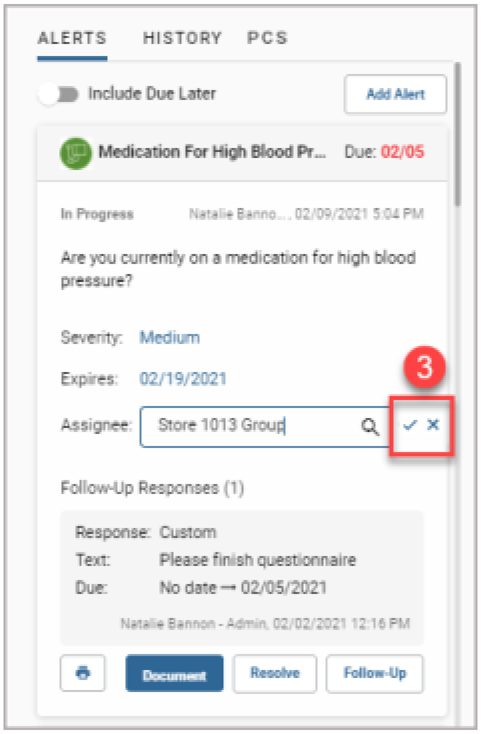
For more information on creating Groups, please refer to "CPS Groups" on page 207.



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.

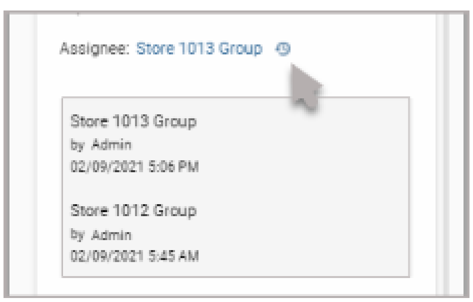


2. In the **Assignee** field start to type the name of an individual or group and a list that includes the same character string will show. Select the assignee from the list.



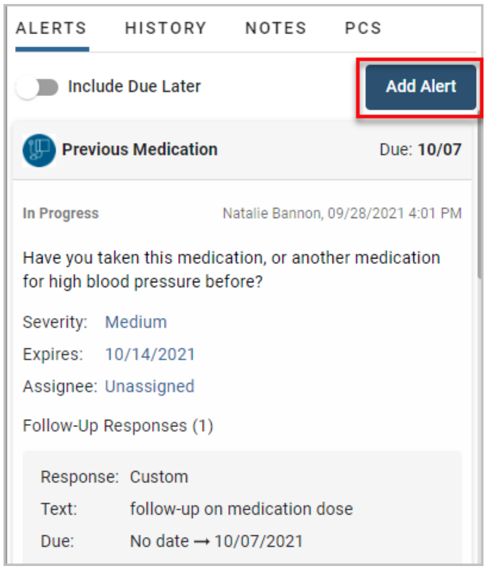
3. Select the **Check Mark** icon to save your change, or the **X** icon to cancel your change.

> **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.

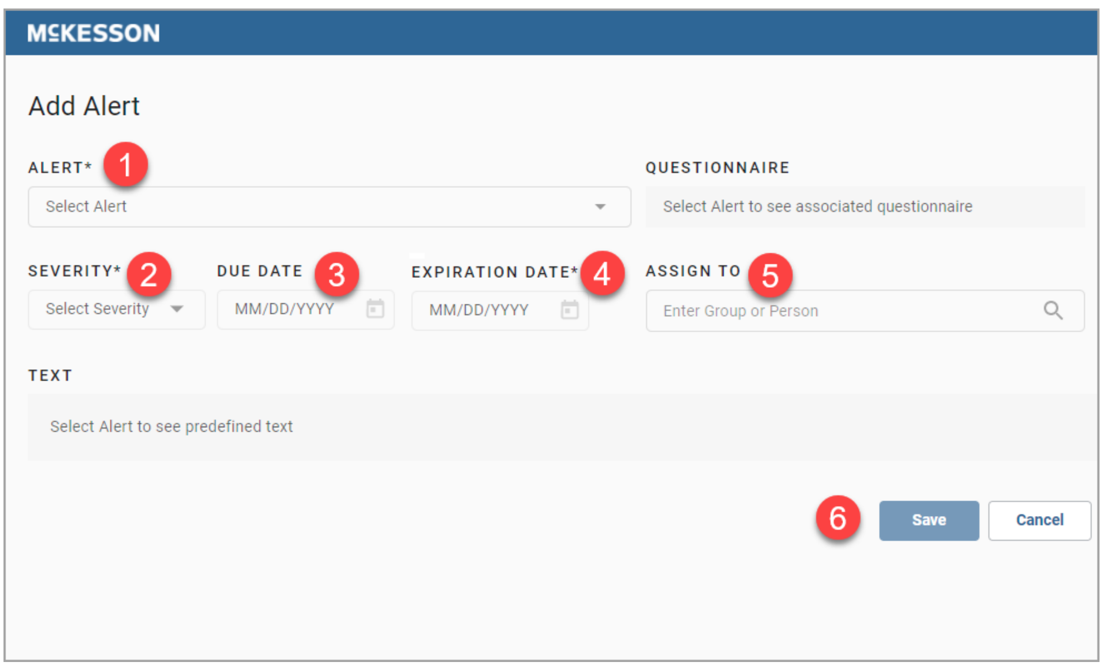


Adding an Alert

From within the **Alerts** tab you can add an Alert for the patient in context, 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. You do have the ability to change the default values.

Important:
Ad hoc Rx Hold Alerts can only be added in the Reception, Data Entry, Adjudication Exception, Pre-Verification 1, and Pre-Verification 2 workflow steps. Note that, for the Reception and Data Entry workflow steps, Rx Hold Alerts can only be added once the current Rx fill has been saved, either manually or by initiating the fill via the Inbound Communications Queue (ICQ). Once added, the Rx Hold Alert will prevent the current Rx fill from advancing forward in workflow until the Alert is resolved.

From the **Alert** drop-down menu a **Hold** icon displays next to the Rx Hold Alert to help differentiate this type of Alert from the others, as shown in the image below.

Rx Hold Alerts are only available with the EnterpriseRx Specialty Solution (ESS). Please contact your Account Executive for more information.

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.

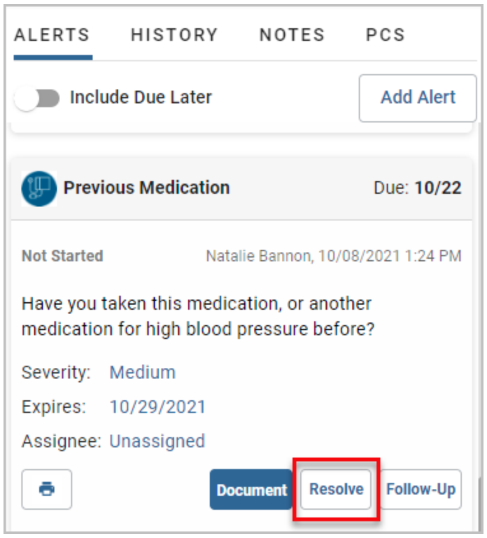
5. In the **Assign To** field start to type the name of an individual or group and a list that includes the same character string will show. Select the assignee from the list. Setting an assignee is optional, and if one is selected the Alert will be assigned to that individual or group.

   For more information on creating Groups, please refer to "CPS Groups" on page 207.

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

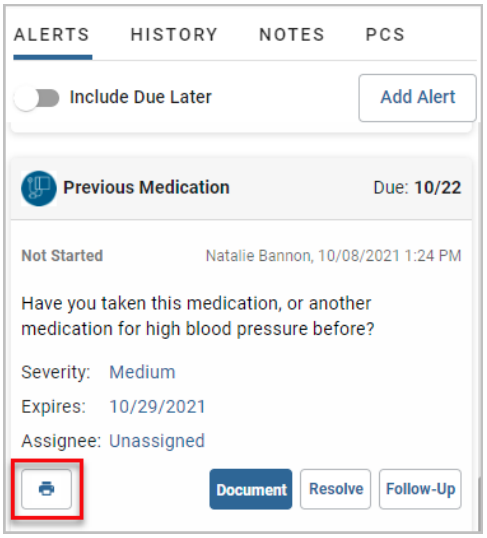
Resolving an Alert

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 155.



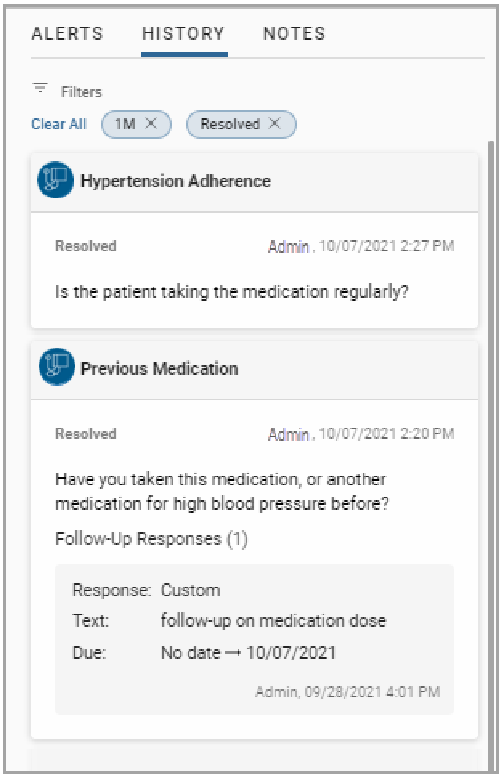
Printing an Alert

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



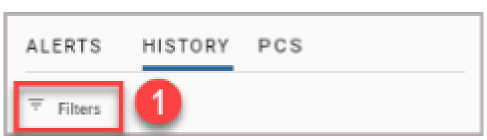
Clinical App History Tab

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 **Lasted Updated** date (newest to oldest) and will include, by default, Alerts resolved within the last month.

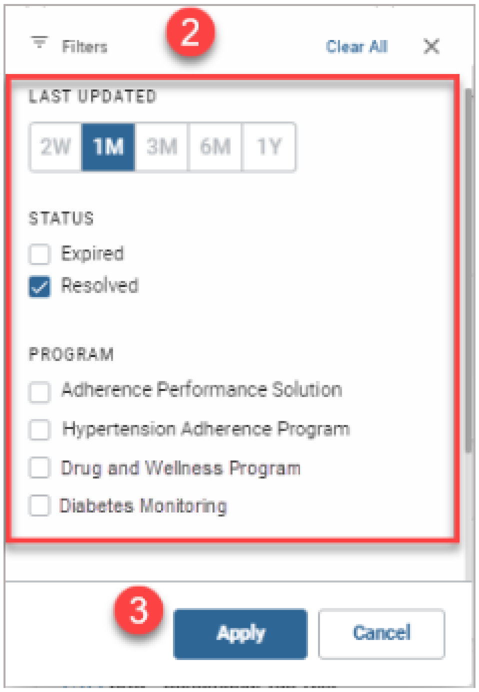


Filtering the Historical Alerts

Follow the steps below to filter for historical Alerts.



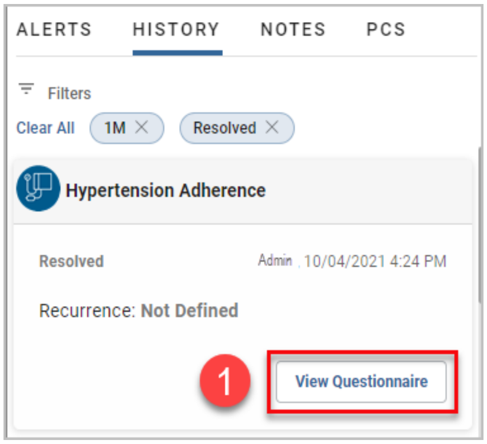
1. On the **History** tab select **Filters** and a **Filters** pop-up displays.



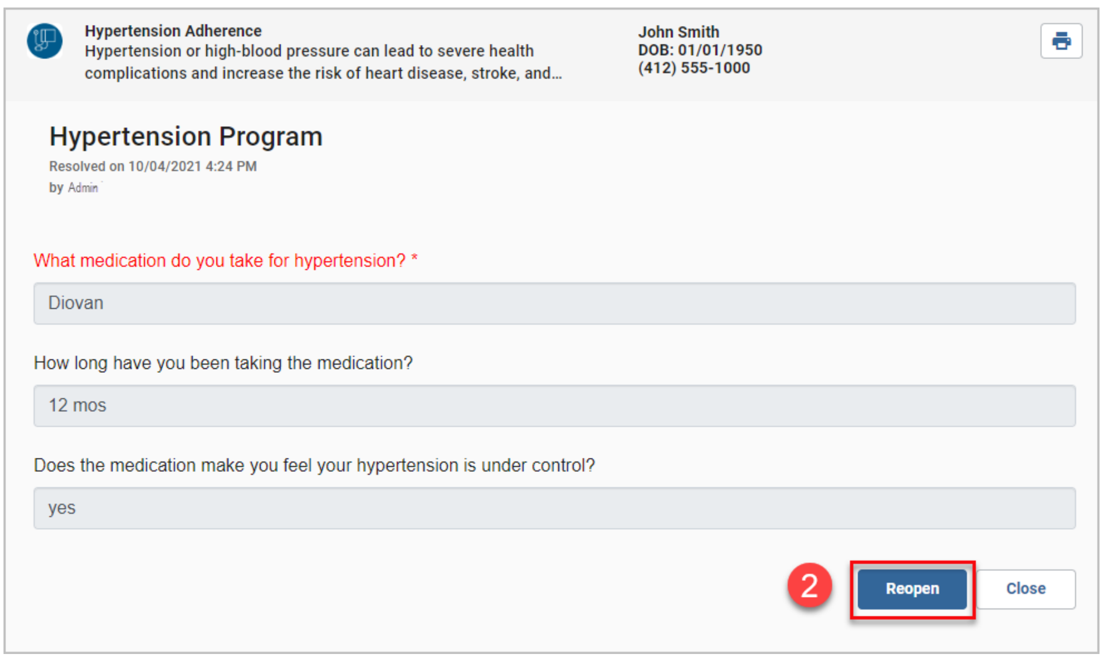
2. Select the filter criteria for the following:
    - **Last Updated:** This filter allows you to specify a time period either 2 weeks, 1 month, 3 months, 6 months or 1 year. You can only choose one option and, if no option is selected, then historical Alerts for the last 3 years will display.
    - **Status:** Filter historical Alerts with a status of **Expired** and/or **Resolved**.
    - **Program:** Check the checkbox(es) of the desired Program(s).
3. Select the **Apply** button and the **Filters** pop-up closes.
4. 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.

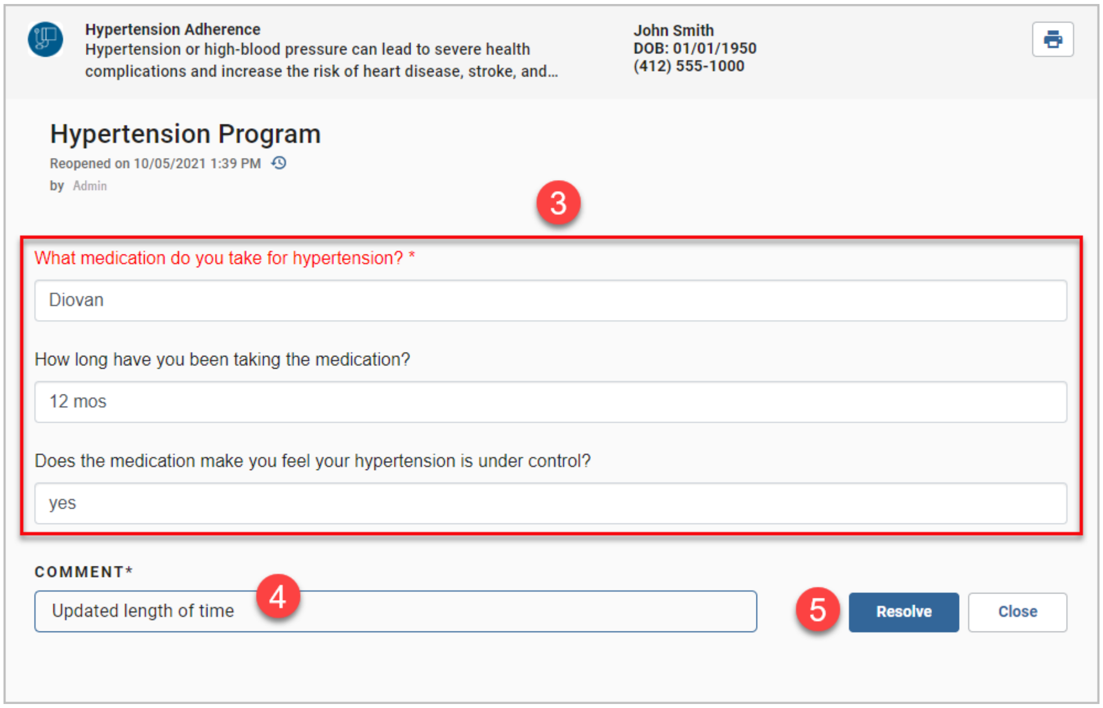


1. On the **History** tab select the **View Questionnaire** button and the questionnaire displays.



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.



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

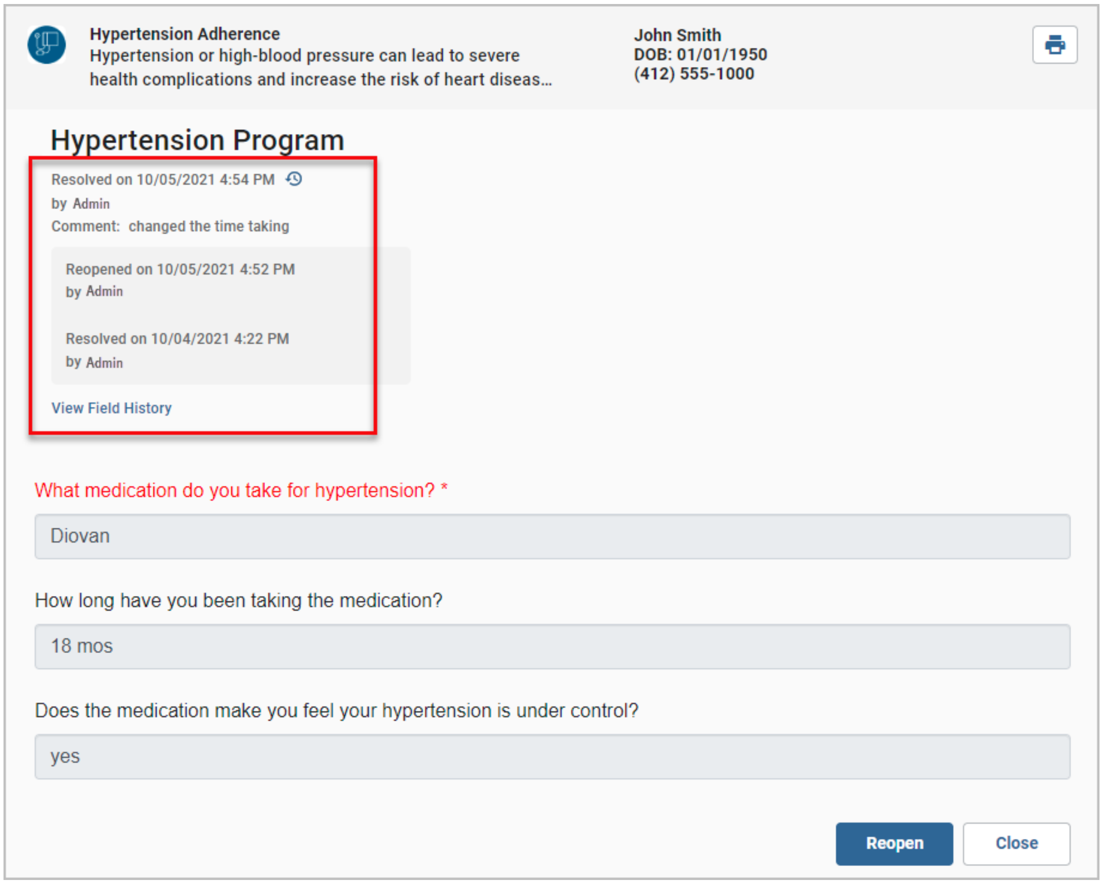
> **Note:**
> If a reopened questionnaire has not been resolved in 24 hours, the questionnaire will automatically be closed for editing.

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

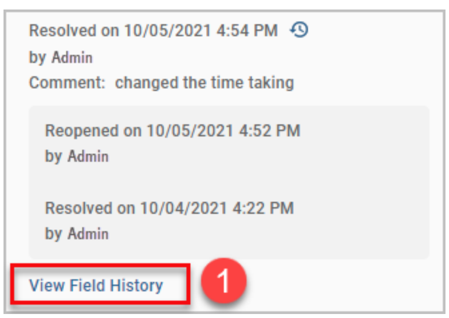
5. Select the **Resolve** button to save your changes and close the questionnaire for editing. Select the **Close** button to discard the changes to the questionnaire.

Reopen and Field History

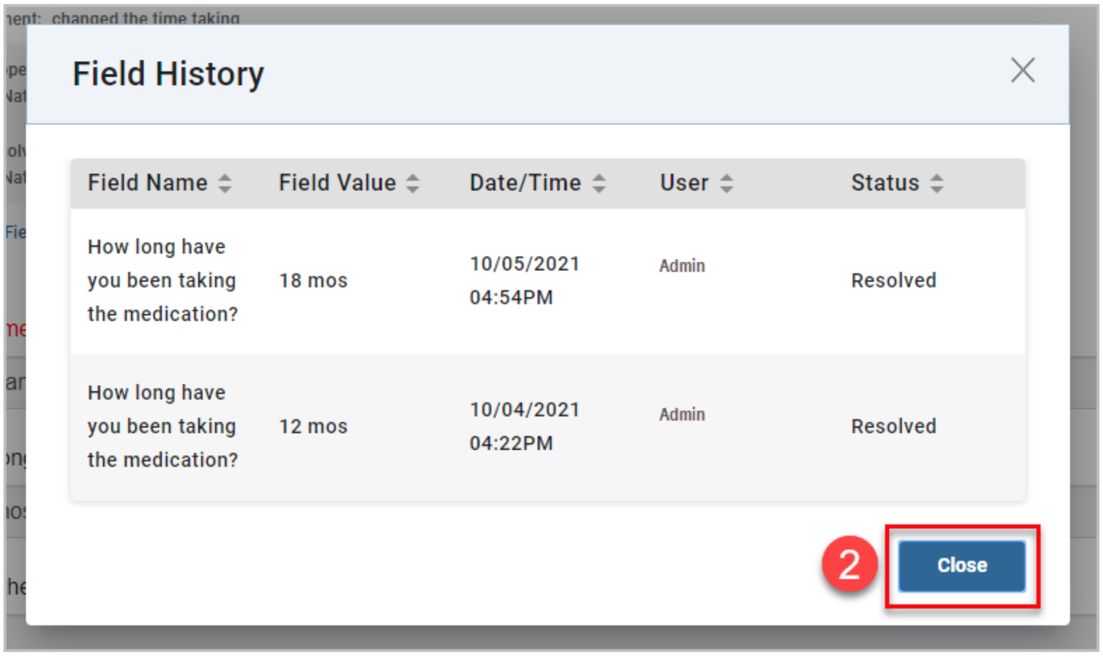
Reopen and field change history only displays if there is change history. It can be seen and accessed from within the questionnaire. Displayed in the questionnaire is the resolved or reopened date/time, by who and the comment the user included.



Select the **History** icon ( ) to expand the history. Reselect the icon to collapse the history.



1. If field history is available to view a **View Field History** link displays. Select the **View Field History** link and the **Field History** pop-up displays.



The **Field History** displays the history of updates made to the fields in the questionnaire. The information is sorted in first by **Field Name** (oldest to newest), then by the **Date/Time**. However, the columns can be sorted by clicking the column name.

2. Select the **Close** button to close the window.

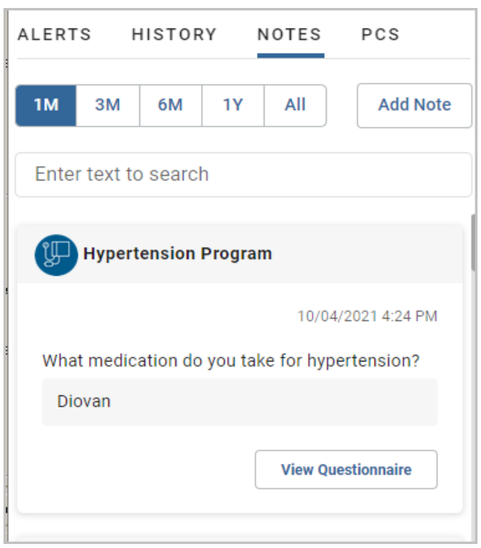
Clinical App Notes Tab

The **Notes** tab provides easy access to the two types of notes:

- Data from resolved questionnaires, that was configured to be captured in a notes summary. For this note type you will be able to view, print and reopen the associated questionnaire.
- Notes added to a patient profile from the **Notes** tab. For this note type you will be able to view, print and reopen the note.

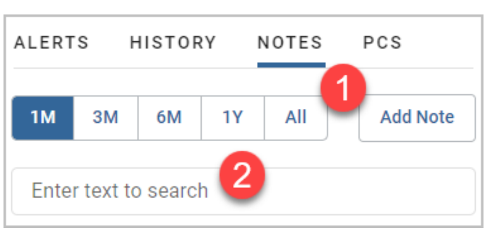
Note:
The reopen option is only available if you have the appropriate role.

For each note you will also be able to view the user that last updated the questionnaire or note and the corresponding date/time. The **Notes** tab will be sorted by newest to oldest and will include, by default, notes from within the last month.



Searching for Notes

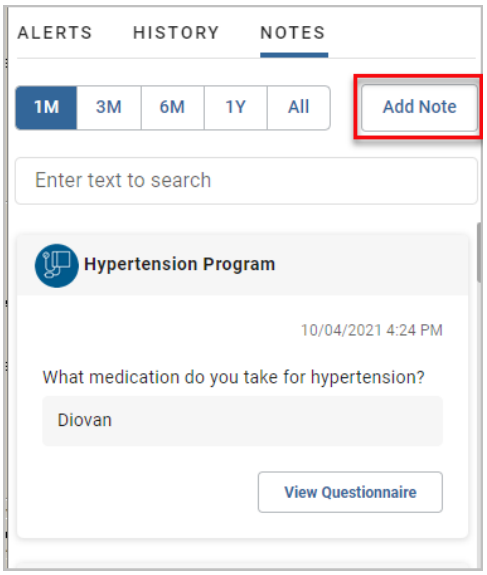
Follow the steps below to search for notes.



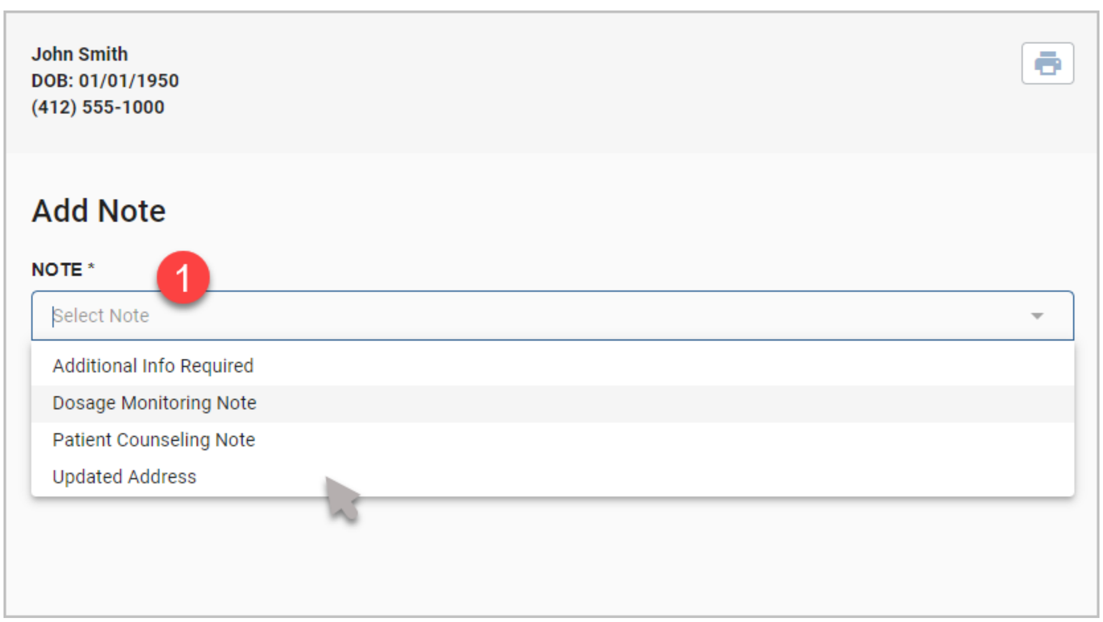
1. On the **Notes** tab, specify a time period either 1 month (**1M**), 3 months (**3M**), 6 months (**6M**), 1 year (**1Y**) or **All**. You can only choose one option.
2. Enter search criteria into the field and the results display.

Adding a Note

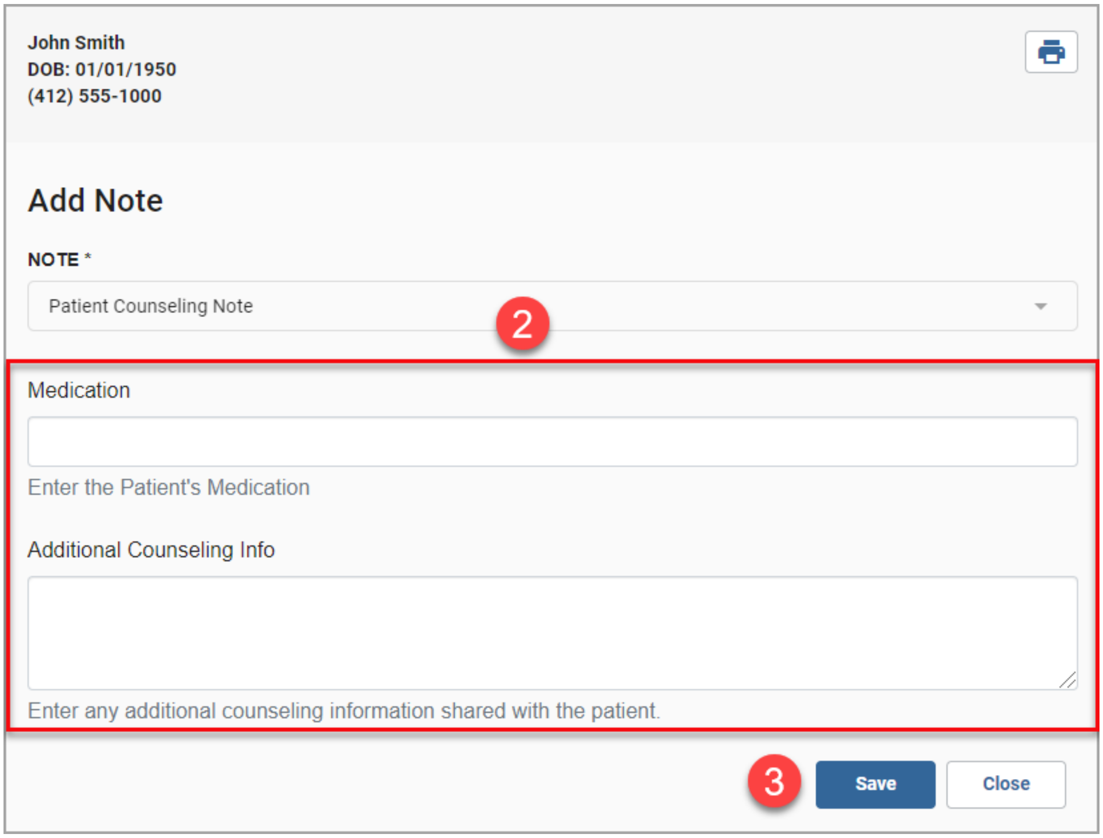
From within the **Notes** tab you can add a note for the patient on demand as needed. .



To begin adding a note select the **Add Note** button and the **Add Note** window displays.



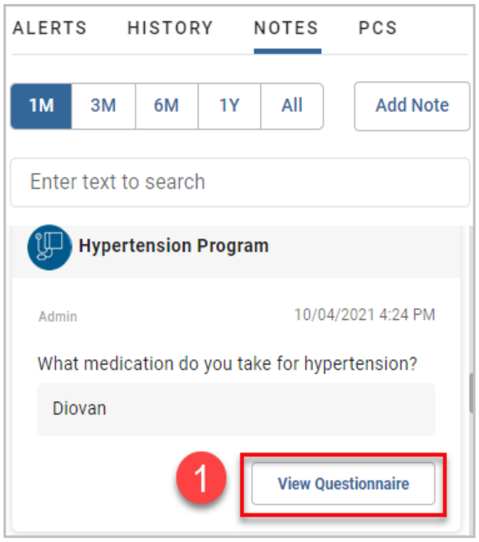
1. From the **Note** drop-down select the note or start to type a note name in the field and a list of available notes that include the same character string will show.

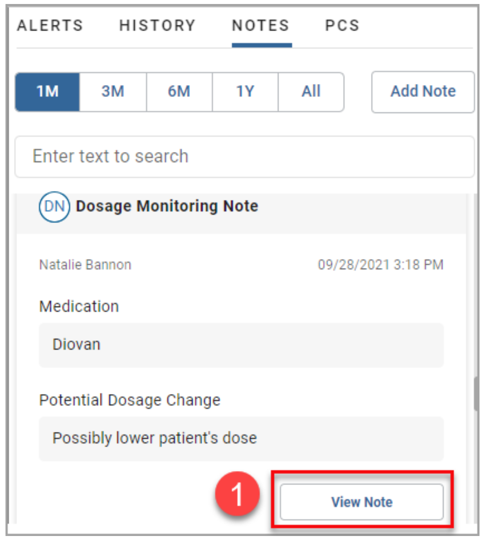


2. Enter the patient's information into the note.
3. Select the **Save** button.

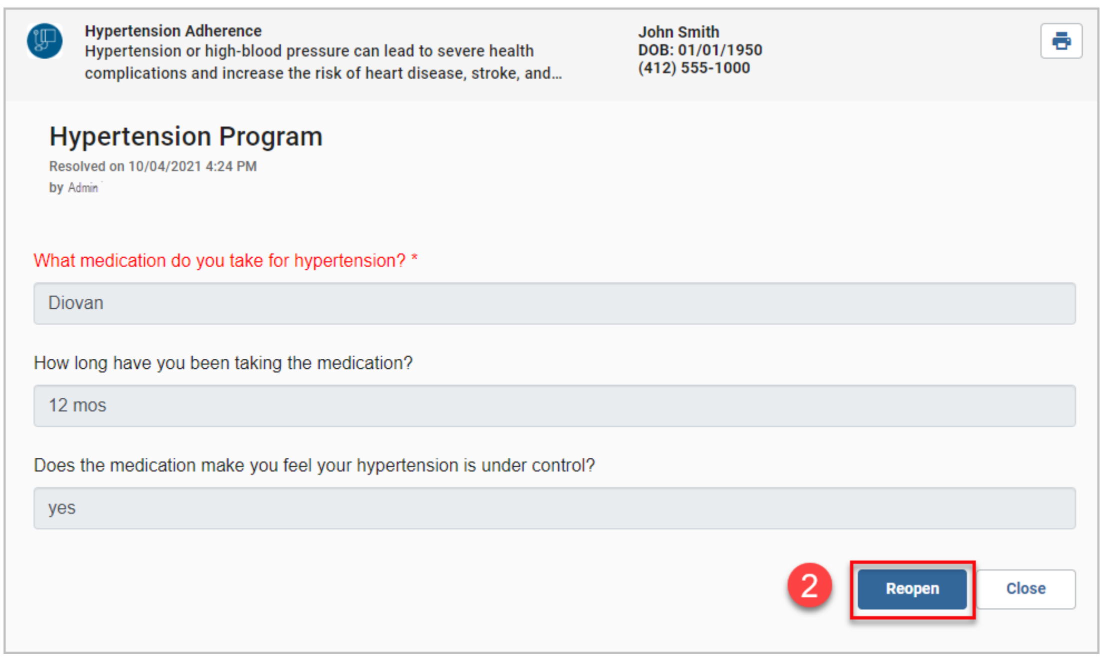
Viewing and Reopening Questionnaires or Notes

Using the **Notes** tab, you can access the note or the note's associated questionnaire.



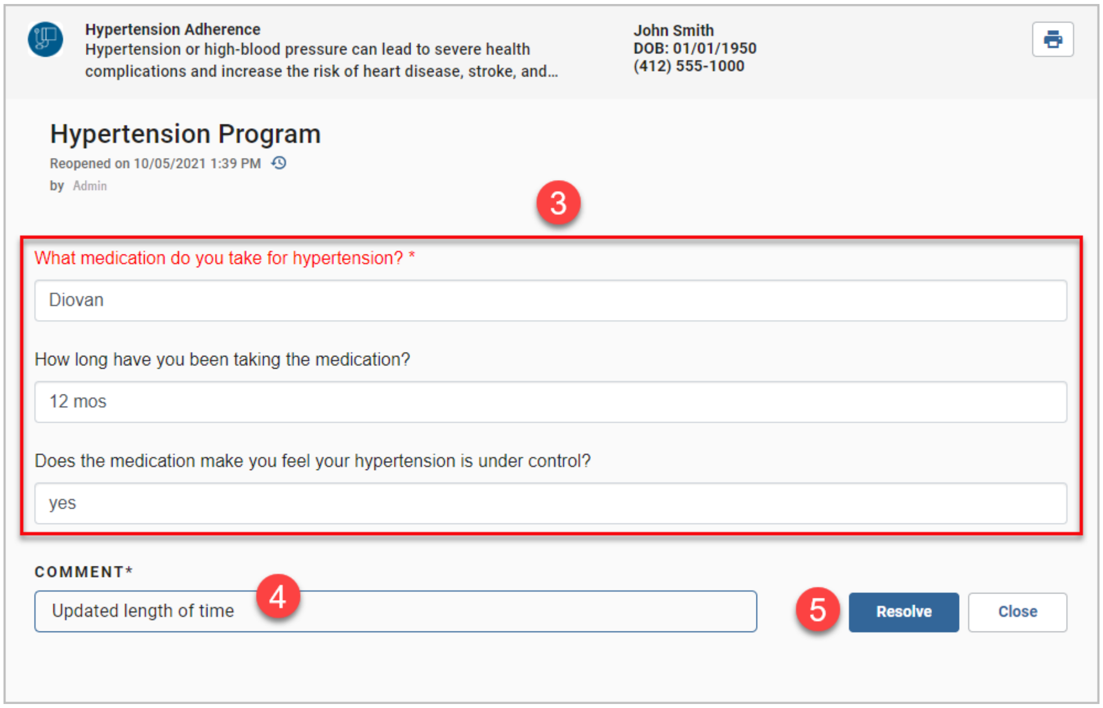


1. On the tab, select the **View Questionnaire** or the **View Note** button and the questionnaire or note displays.



2. Select the **Reopen** button to edit the questionnaire or note.

Note:
The **Reopen** button will only display in a historical questionnaire or note if you have the appropriate role.



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

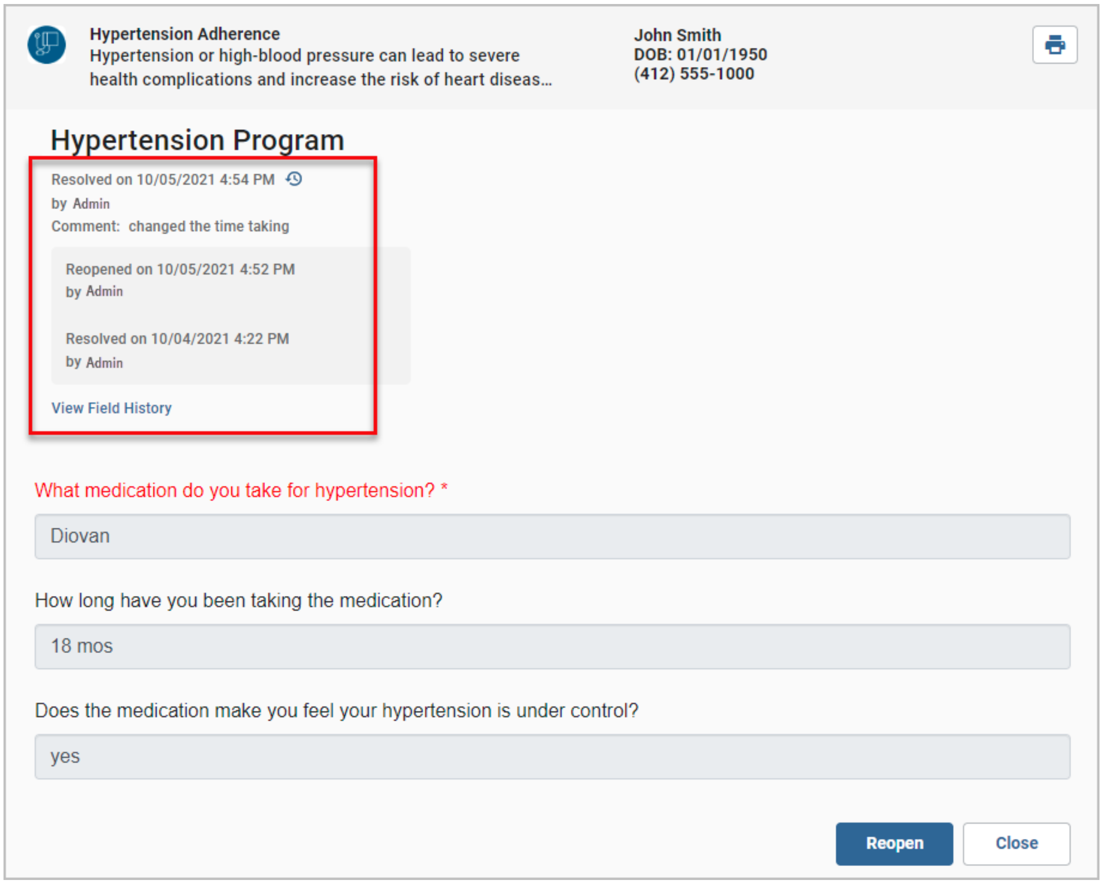
Note:
If a reopened questionnaire or note has not been resolved in 24 hours, the questionnaire will automatically be closed for editing.

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

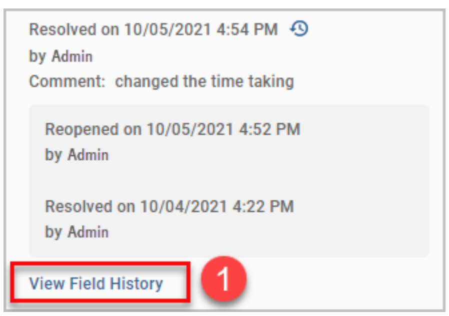
5. Select the **Resolve** button to save your changes and close the questionnaire for editing. Select the **Close** button to discard the changes to the questionnaire.

Reopen and Field History

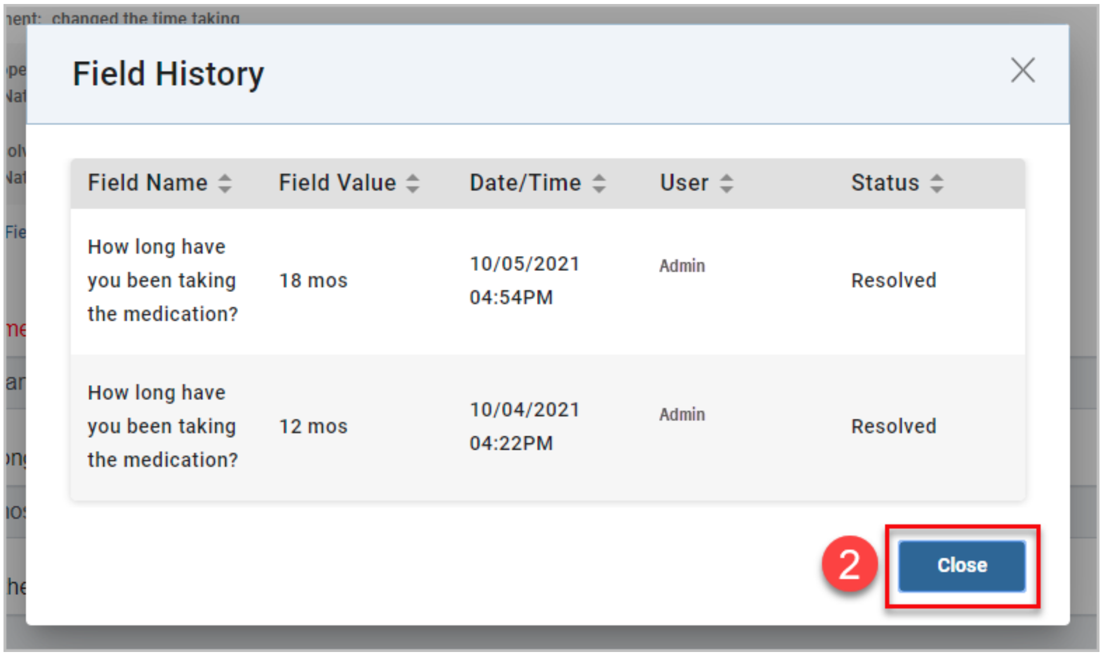
Reopen and field change history only displays if there is change history. It can be seen and accessed from within the questionnaire or note. Displayed is the resolved or reopened date/time, by who and the comment the user included.



Select the **History** icon ( ) to expand the history. Reselect the icon to collapse the history.



1. If field history is available to view a **View Field History** link displays. Select the **View Field History** link and the **Field History** pop-up displays.



The **Field History** pop-up includes all fields that have had a change in value for the life of the questionnaire or note. By default, the **Field Names** display in the same order as they display in the questionnaire/note. If a **Field Name** has multiple **Field Values** associated, the **Field Values** for that **Field Name** will be sorted newest to oldest by default. At any time, however, the columns can be sorted by clicking the column name.

2. Select the **Close** button to close the window.

Clinical App PCS Tab

Please refer to "CPS Vendor Programs" on page 219, "Accessing On Demand Messages in the Clinical App" on page 245 for more information about the **PCS** tab.

Clinical App Links Tab

Please refer to "CPS and STRAND Integration" on page 273 for more information about the **Links** tab.

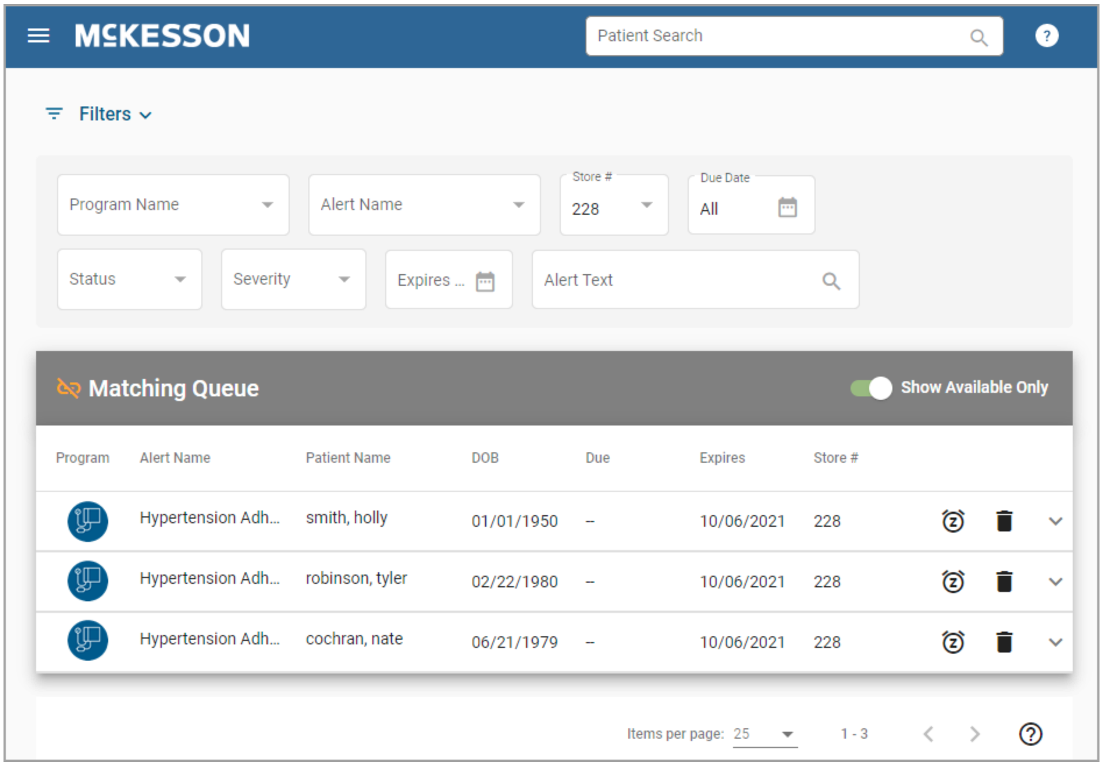
Chapter 9: CPS Matching Queue

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

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



By default, all available Alerts will display in the queue for your logged in EnterpriseRx facility. The **Show Available Only** toggle is also set to on so that Alerts being viewed by another user in your pharmacy are hidden. To see all Alerts, toggle the **Show Available Only** option to off. When the toggle is switched off, Alerts that are being viewed by another user in your pharmacy will highlight gray and be disabled.

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)

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.

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:

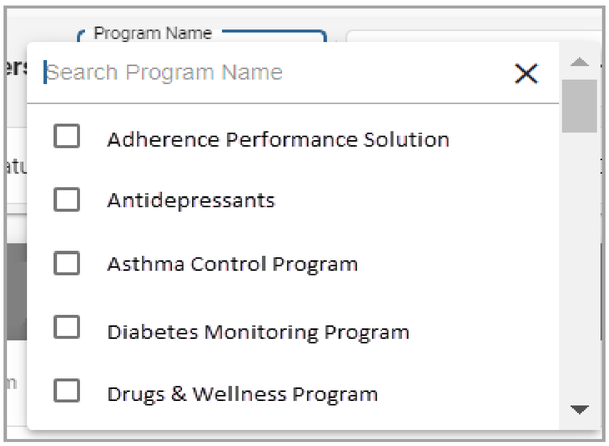
- You clear the sort utilizing the 3rd click.
- You navigate to a different window, excluding the **Alert Queue**.

- You logout of CPS.

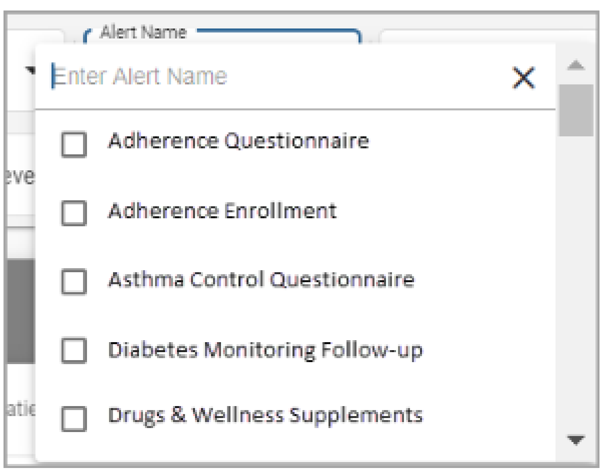
Filtering Alerts in the Matching Queue

When the **Matching Queue** is opened, the Filters section will be expanded by default. To narrow down the amount of Alerts you can filter the queue by any of the following:

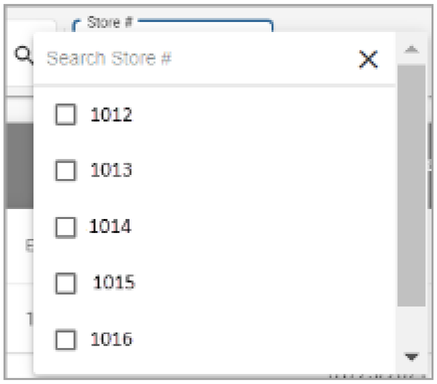
- **Program Name**: Start to type a Program name in the field and a list with the same character string will show. Or select the drop-down arrow to display a list of active Programs, as well as inactive Programs with at least one active (not yet expired) unmatched Alert. Check the box(es) of the desired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



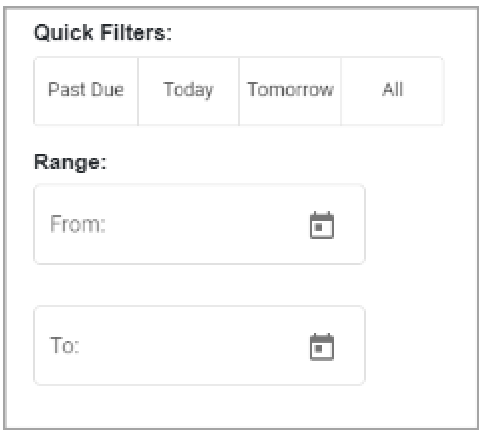
- **Alert Name**: Start to type an Alert name in the field and a list with the same character string will show. Or select the drop-down arrow to display a list of Alert names that belong to all active Programs, as well as Alert names of active (not yet expired) unmatched Alerts that belong to inactive Programs. Check the box(es) of the desired Alert(s).



- **Store #**: You can view unmatched Alerts for your logged in EnterpriseRx facility, as well as for the facilities for which you do load balancing. 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 configured for load balancing. Check the box(es) of the desired store(s).



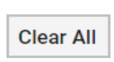
- **Due Date:** The **Due Date** filter allows you to select a **Quick Filter** or input a custom date range.

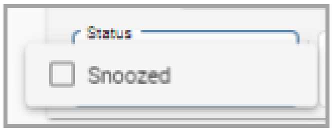


Available **Quick Filters** include:

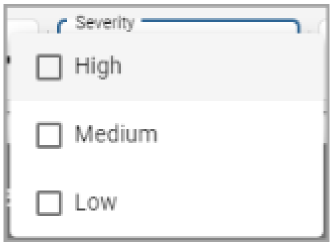
- **Past Due**: This filter restricts the results to those Alerts that are past due.
- **Today**: This filter includes all Alerts that are past due as well as those that are due today.
- **Tomorrow**: This filter includes all Alerts that are past due, due today and due tomorrow.
- **All**: This filter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

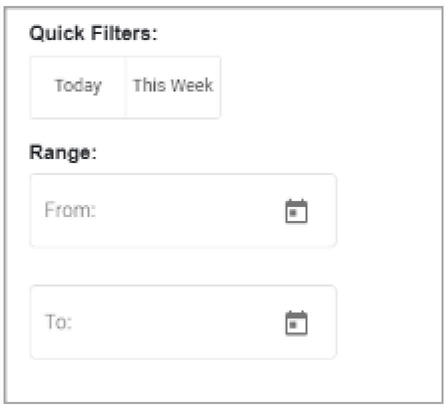
- **Clear All**: The **Clear All** option () resets the filters back to the default view. Note that this option only displays if there are 1 or more active filters in place beyond the default view.
- **Status:** Select the drop-down arrow and select to filter all Alerts that are in a **Snoozed** status.



- **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.



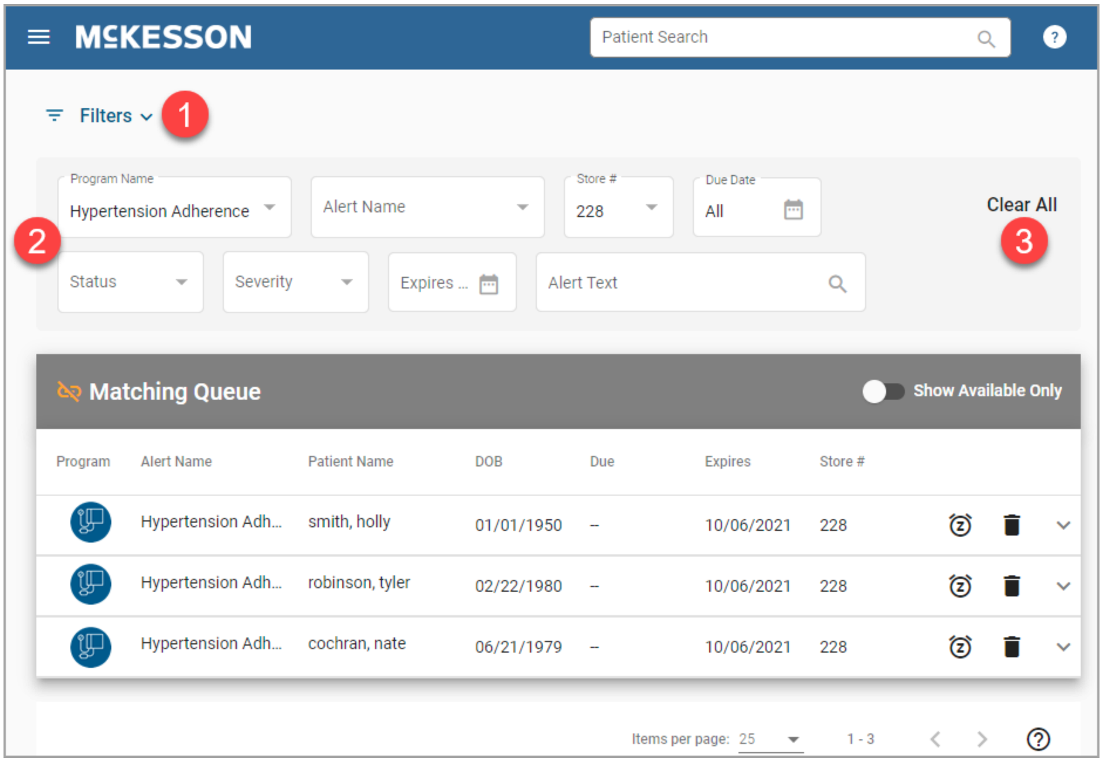
Available **Quick Filters** include:

- **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.

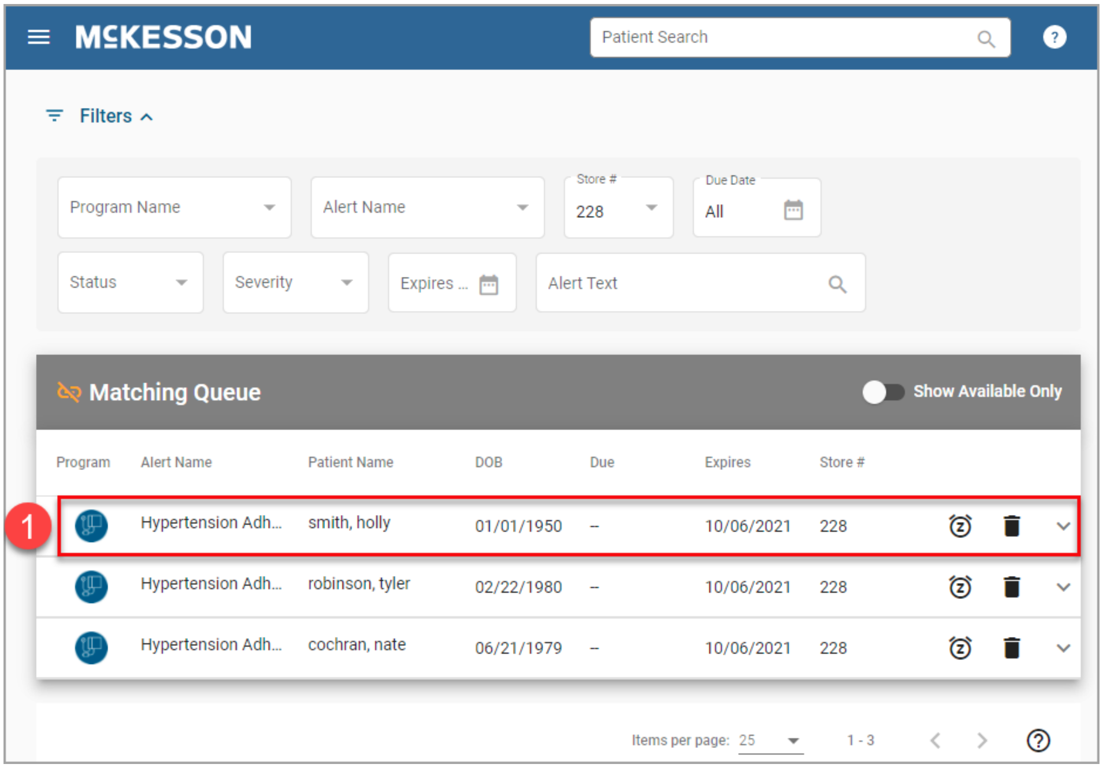
Filtering the Matching Queue Example



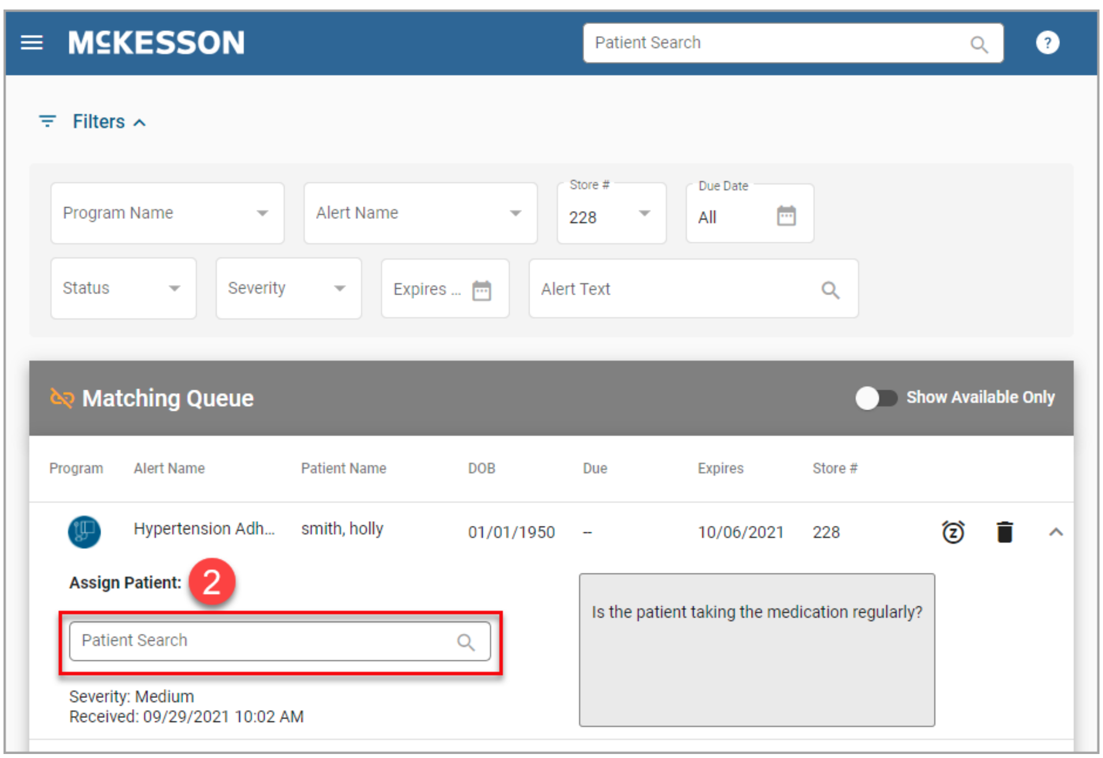
1. By default the **Filters** section is expanded. If it is not use the arrow to expand the **Filters**.
2. In the fields, select the filter criteria and the **Matching Queue** is updated to reflect the filter criteria.
3. To clear all **Matching Queue** filters, select **Clear All**.

Assigning an Alert to a Patient

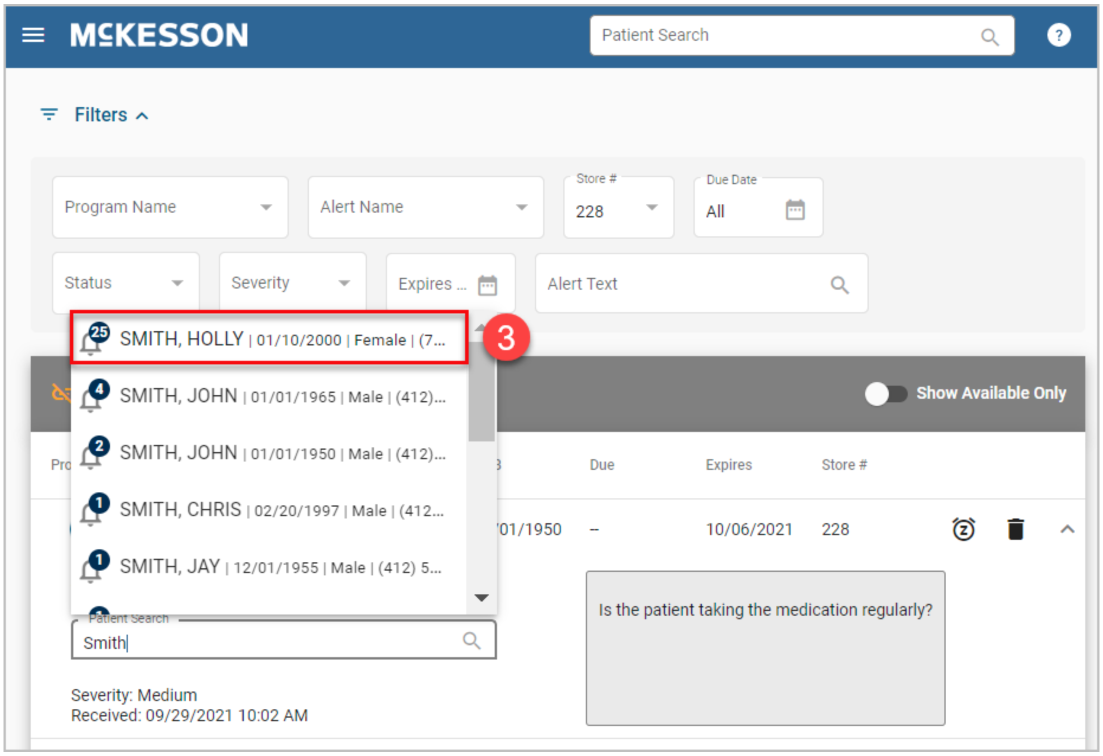
You can associate an Alert to a patient directly from the **Matching Queue**.



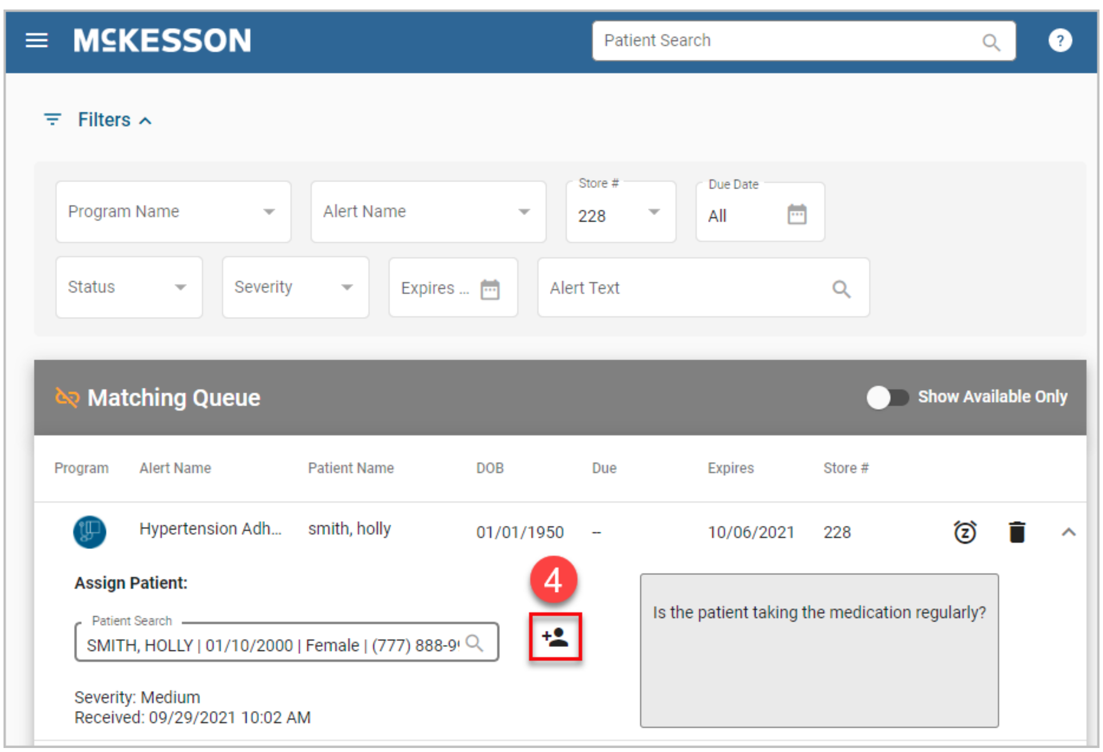
1. Select the desired Alert in the **Matching Queue** to expand the Alert's details.



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.



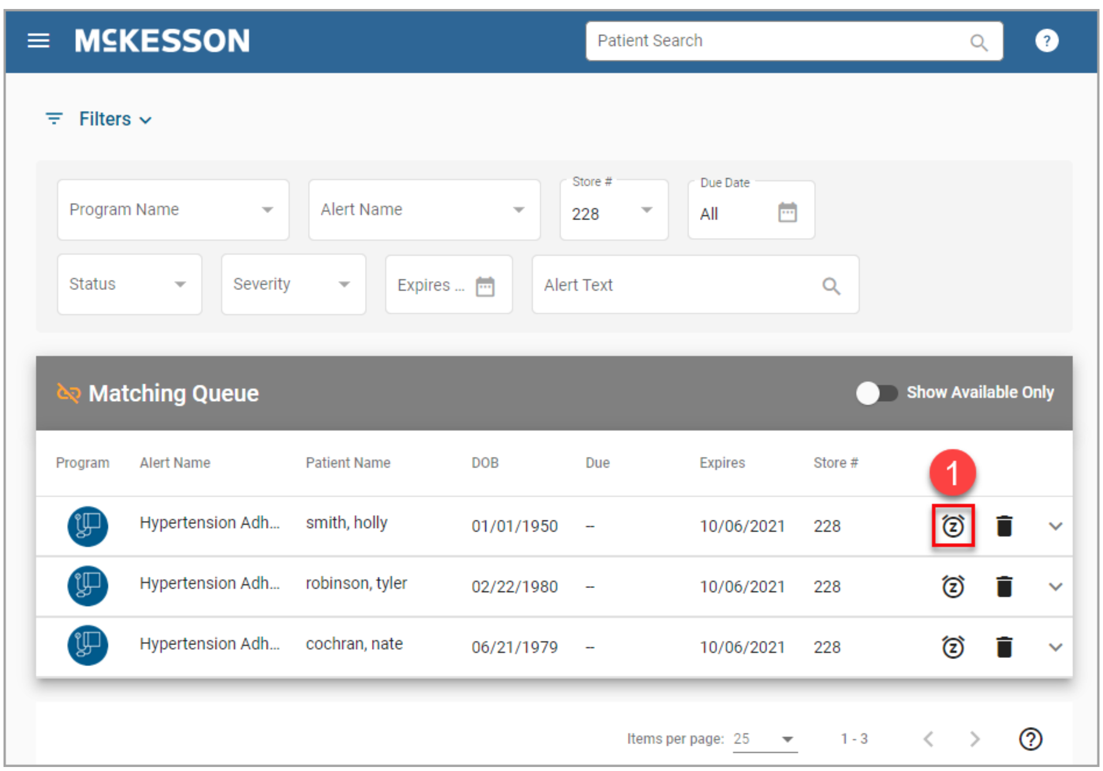
4. Next, select the **Add Patient** ( ) button to assign the Alert to the selected patient and remove the Alert from the **Matching Queue**.

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.

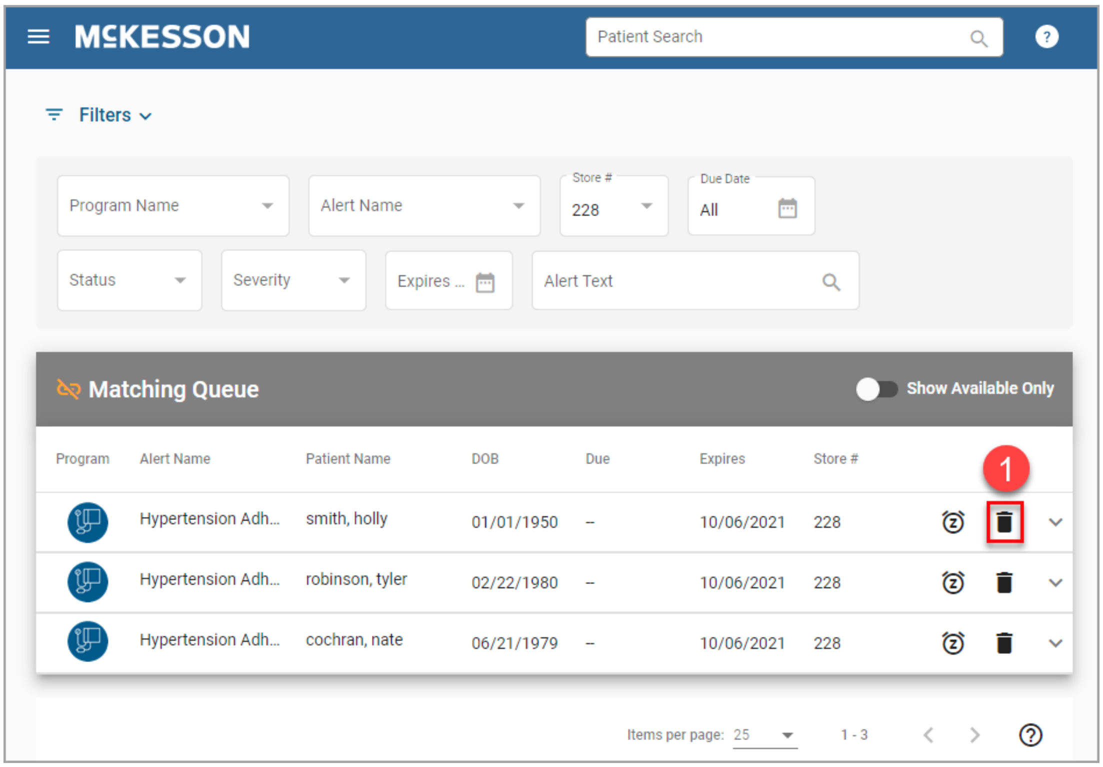


1. Select the **Snooze Alert** ( ) button for the desired Alert.

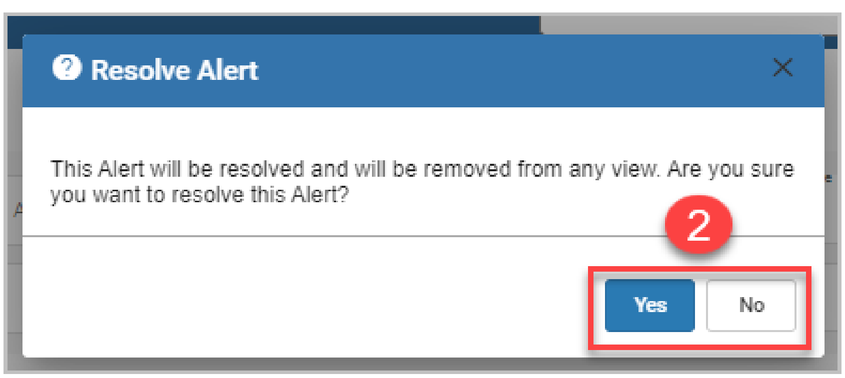
Note:
You can unsnooze an Alert by filtering the **Matching Queue** for snoozed Alerts and then selecting the green **Snooze Alert** ( ) button for the Alert.

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**.



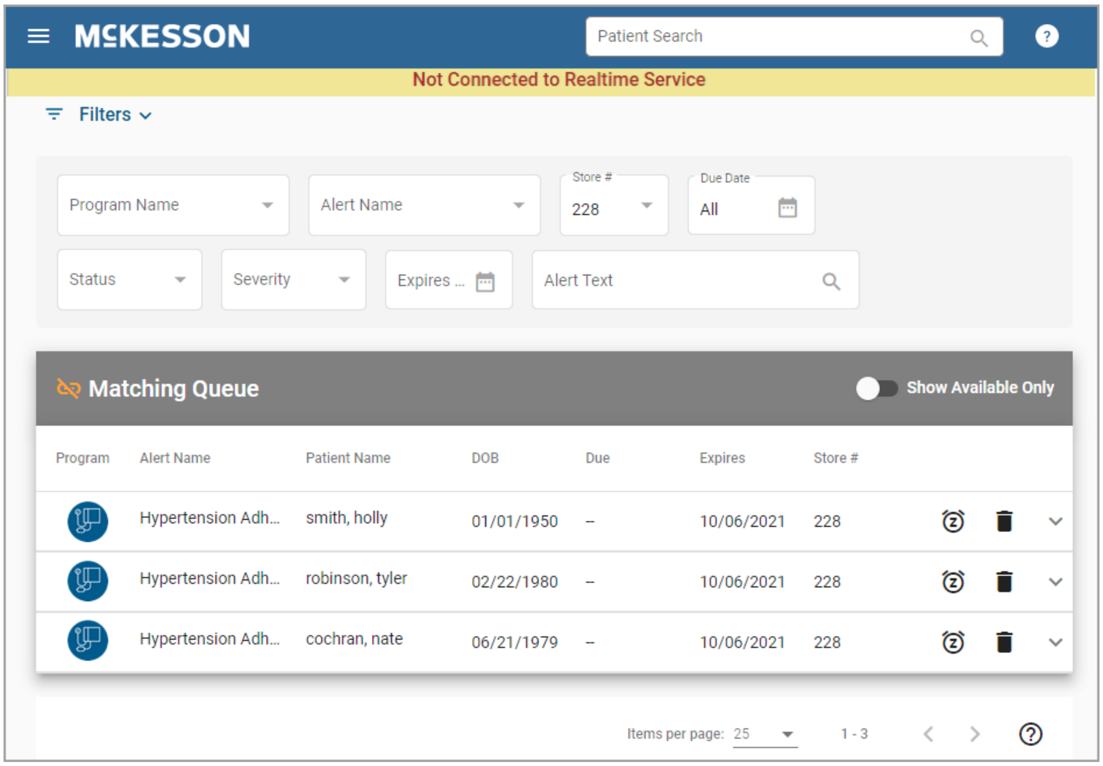
1. Select the **Resolve Alert** ( ) button for the desired Alert.



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

Realtime Service Notification

When you access the **Matching Queue** and the Realtime Service is down, a notification displays at the top of the window. The service may be down due to an internet outage. The warning does not prevent users from using the software, however you will not see any updates in real-time from other users.



Note:
When the Realtime Service is down the notification also displays in the other windows of the software.

Chapter 10: CPS Alert Queue

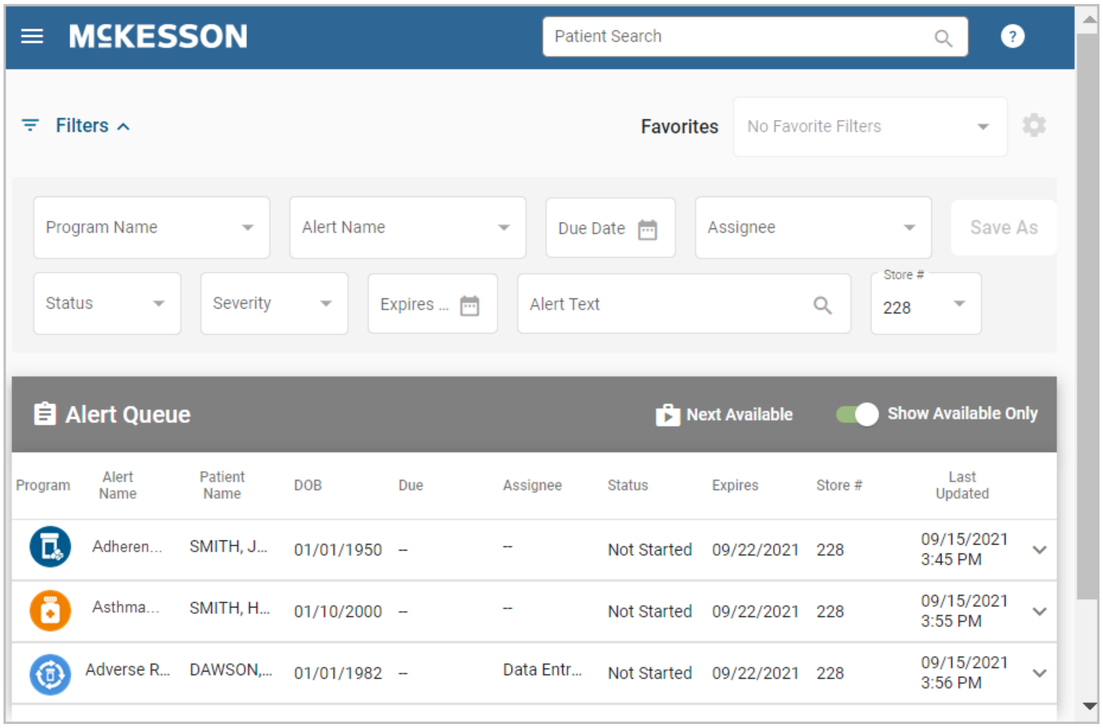
The **Alert Queue** provides a list of all active Alerts available for patients both in your local store and if you do load balancing for another store, so you can take action outside of workflow. The Alerts displayed in this queue can be prioritized, according to the parameters you apply, so that you can deal with the most important Alerts first. Alerts will continue to populate in this queue until they have been resolved or they expire.

Actions You Can Take in the CPS Alert Queue

- "Sort Order in the Alert Queue" on the next page
- "Accessing Total Count in the Alert Queue" on page 182
- "Column Sorting in the Alert Queue" on page 183
- "Filtering Alerts in the Alert Queue" on page 183
- "Setting Up Favorites Filters" on page 188
- "Open a Patient Profile via Alert Queue" on page 193
- "Realtime Service Notification" on page 193

Sort Order in the Alert Queue

Navigate to the **Alert Queue**. If using EnterpriseRx, select the **Rx Queues** menu option followed by **CPS Queues**.



By default, Alerts will display in the queue for your logged in EnterpriseRx facility and will include Alerts that are past due, due within the Due Date Reminder range configured for the Alert and Alerts without a defined due date. The **Show Available Only** toggle is also set to on so that Alerts being viewed by another user in your pharmacy are hidden. To see all Alerts, toggle the **Show Available Only** option to off. When the toggle is switched off, Alerts that are being viewed by another user in your pharmacy will highlight gray.

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)

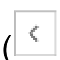
Note the following specifics about **Alert Queue** attributes:

- **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 name, you can hover over the Alert Name.
- **Patient Name**: The first and last name of the patient associated to the Alert.

- **DOB**: The date of birth of the patient associated to the Alert.
- **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.

Accessing Total Count in the Alert Queue

At the bottom of the **Alert 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 Alert Queue

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

- First click: Ascending. An up arrow (

) will be displayed in the column header.
- Second click: Descending. A down arrow (

) 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, excluding the **Matching Queue**.
- You close the **Clinical App** (**Alert Queue**) window.

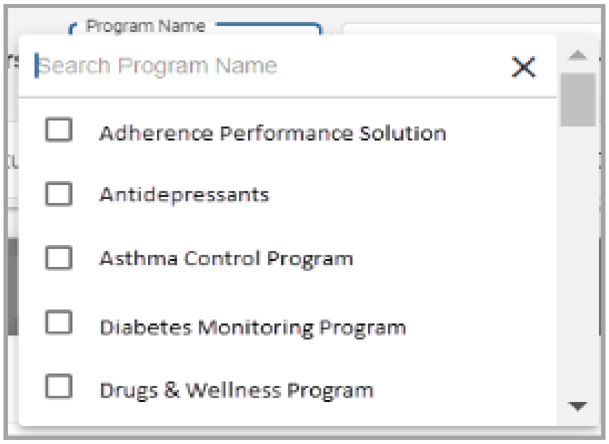
Filtering Alerts in the Alert Queue

When the **Alert Queue** is opened, the **Filters** section will be expanded by default.

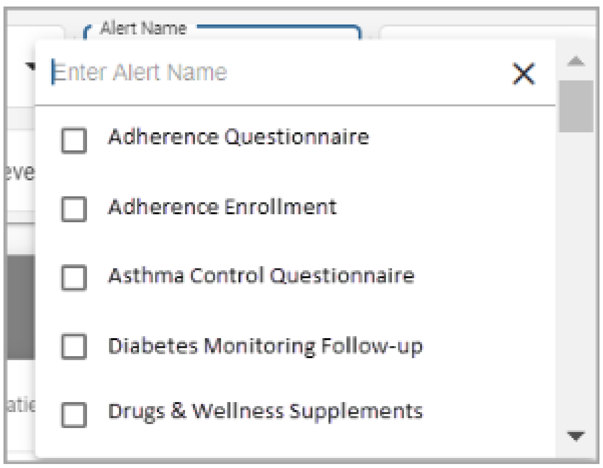
> **Important:**
> If you have a default favorite filter saved, your filter criteria will be automatically applied upon opening the **Alert Queue** and the **Filters** section will be collapsed. For more information on favorite filters, please refer to "Setting Up Favorites Filters" on page 188.

To narrow down the amount of Alerts you can filter the queue by any of the following:

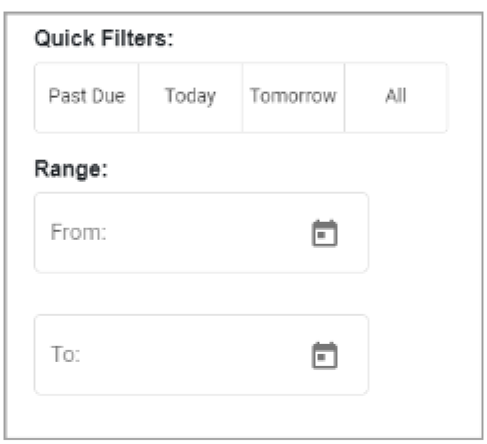
- **Program Name**: Start to type a Program name in the field and a list with the same character string will show. Or select the drop-down arrow to display a list of active Programs, as well as inactive Programs with at least one active (not yet expired) Alert. Check the box(es) of the desired Program (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 that belong to all active Programs, as well as Alert names of active (not yet expired) Alerts that belong to inactive Programs. 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.

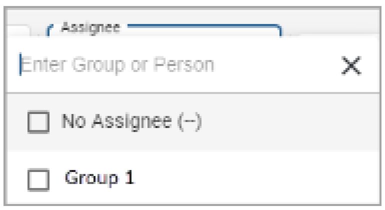


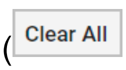
Available **Quick Filters** include:

- **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.

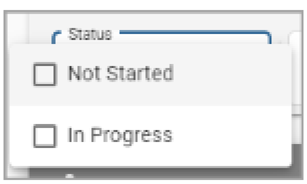
The **Range** filter option allows you to enter a custom start date (**From**) and end date (**To**). Only those Alerts with a due date within the specified range will be displayed.

- **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 and individuals. Check the box(es) of the desired assignee(s).

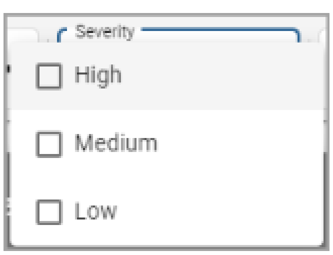


- **Clear All**: The **Clear All** option (

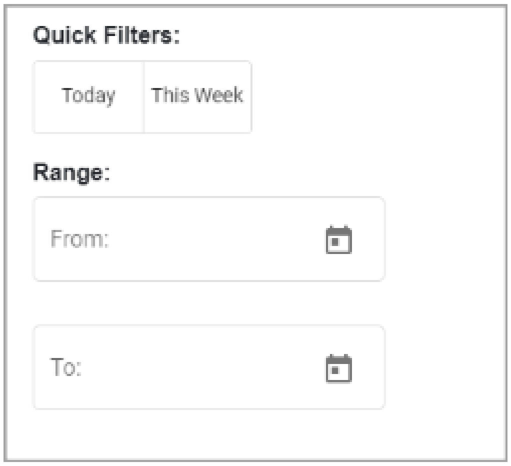
) resets the filters back to the default view. Note that this option only displays if there are 1 or more active filters in place beyond the default view.
- **Status:** Select the drop-down arrow to select an Alert status of either **Not Started** or **In Progress**. Check the box of the desired status.



- **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.



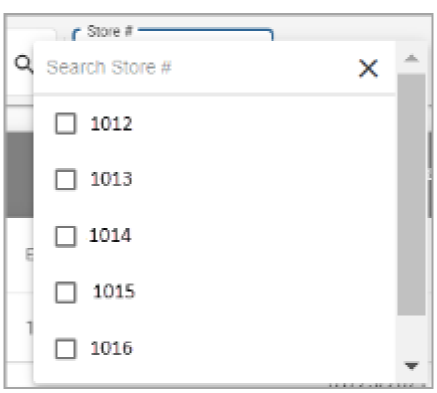
Available **Quick Filters** include:

- **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).

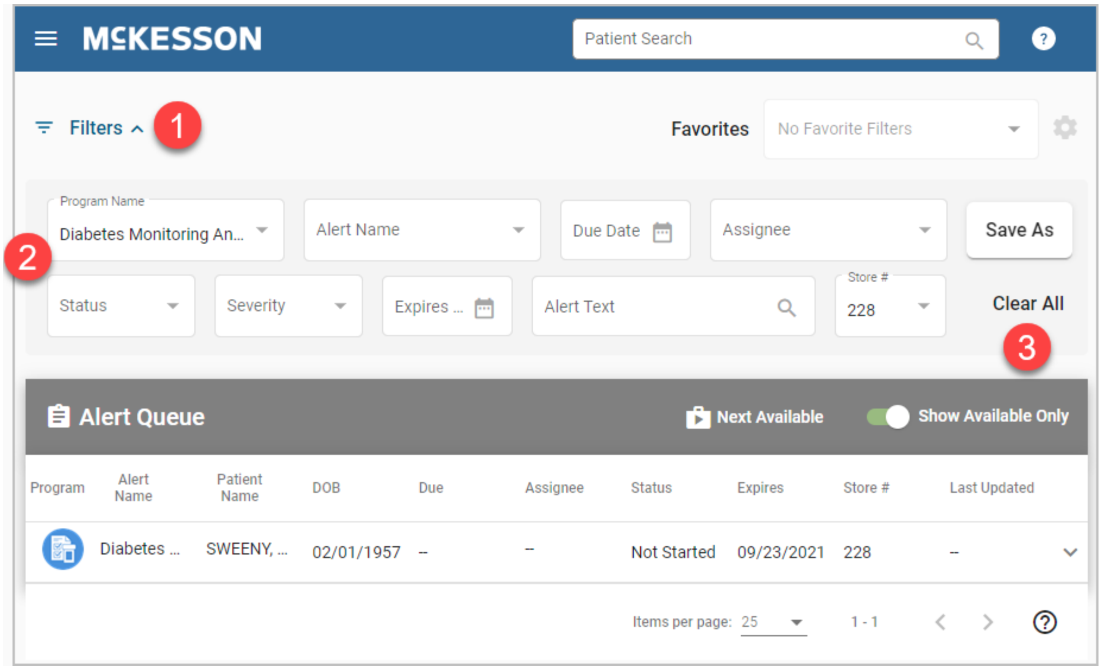
The **Range** filter option allows you to enter a custom start date (**From**) and end date (**To**). Only those Alerts with an expiration date within the specified range will be displayed.

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

- **Store #**: You can view active (not yet expired) Alerts for your logged in EnterpriseRx facility, as well as for the facilities for which you do load balancing. 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 configured for load balancing. Check the box(es) of the desired store(s).



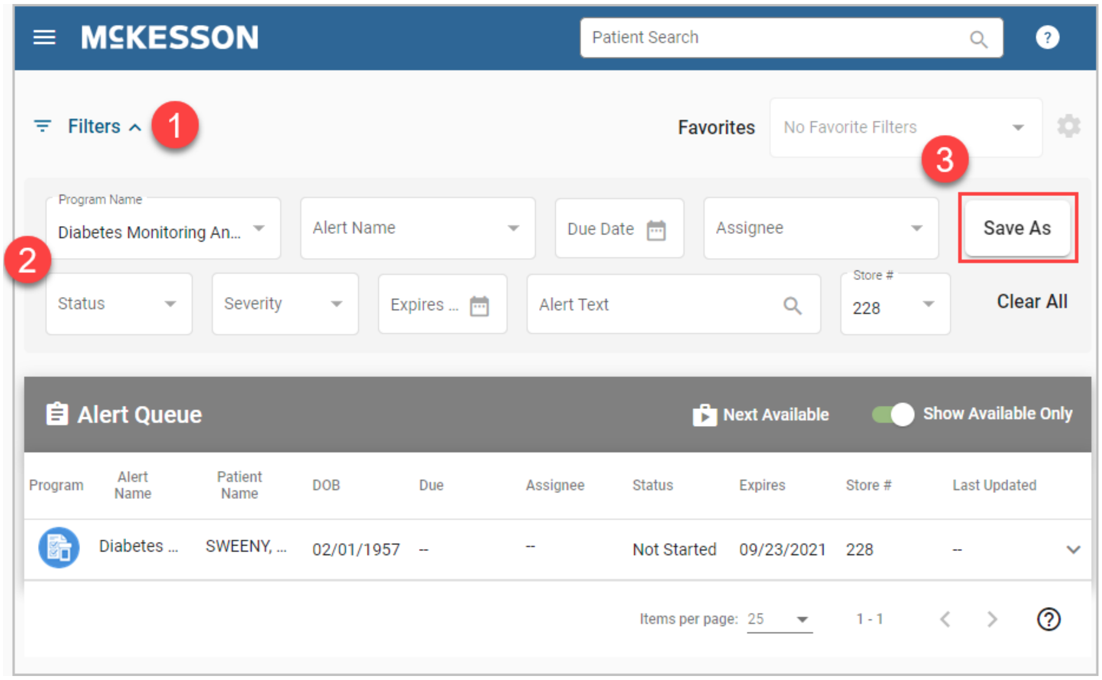
Filtering the Alert Queue Example



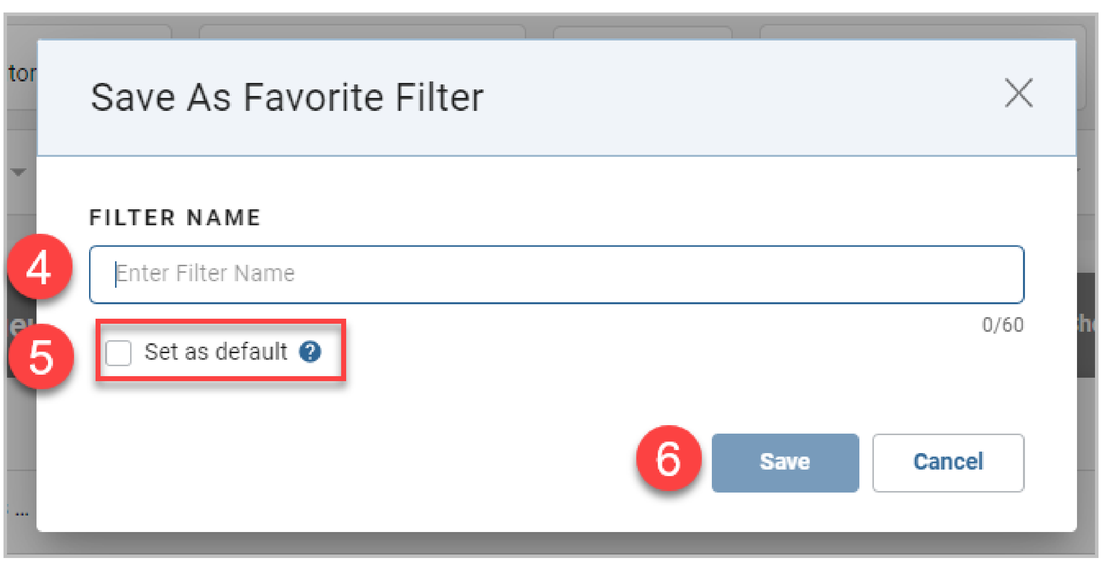
1. By default the **Filters** section is expanded. If it is not use the arrow to expand the **Filters**.
2. In the fields, select the filter criteria and the **Alert Queue** is updated to reflect the filter criteria.
3. To clear all **Alert Queue** filters, select **Clear All**.

Setting Up Favorites Filters

When you filter the **Alert Queue**, you have the option to save your filter criteria so that you can easily apply the same filters in the future. Additionally, you have the option of saving a default favorite filter so that the filter criteria is automatically applied when you open the **Alert Queue**.



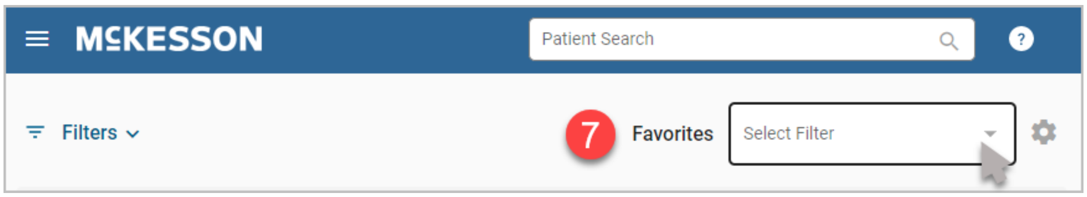
1. Verify that the **Filters** section is expanded by using the arrow.
2. In the fields, select the filter criteria. The filter options are described in "Filtering Alerts in the Alert Queue" on page 183.
3. Select the **Save As** button and the **Save As Favorite Filter** pop-up displays.



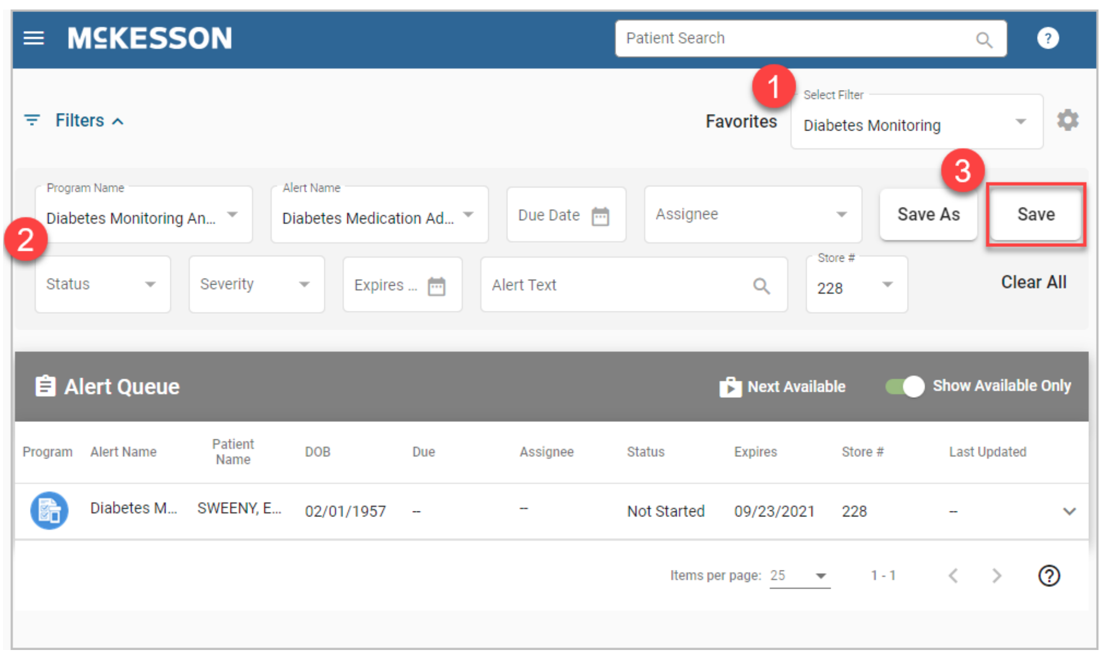
4. In the **Filter Name** text box enter the name of the favorite filter.
5. Select the **Set as default** checkbox to save the filter as the default, if applicable. When checked, this filter configuration will be applied upon opening the **Alert Queue**.
6. Select the **Save** button to save the favorite filter.

Important:
Each user saves and manages their own favorite filters.

7. Once saved, you can easily switch what favorite filter is applied using the **Favorites** drop-down in the **Alert Queue**.

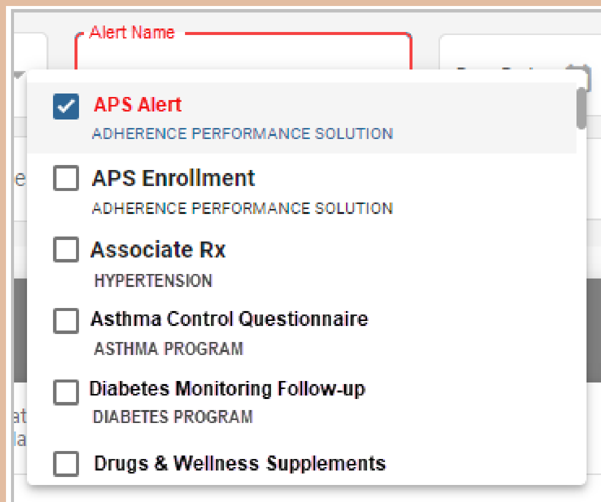


Editing Filter Criteria for Favorite Filters

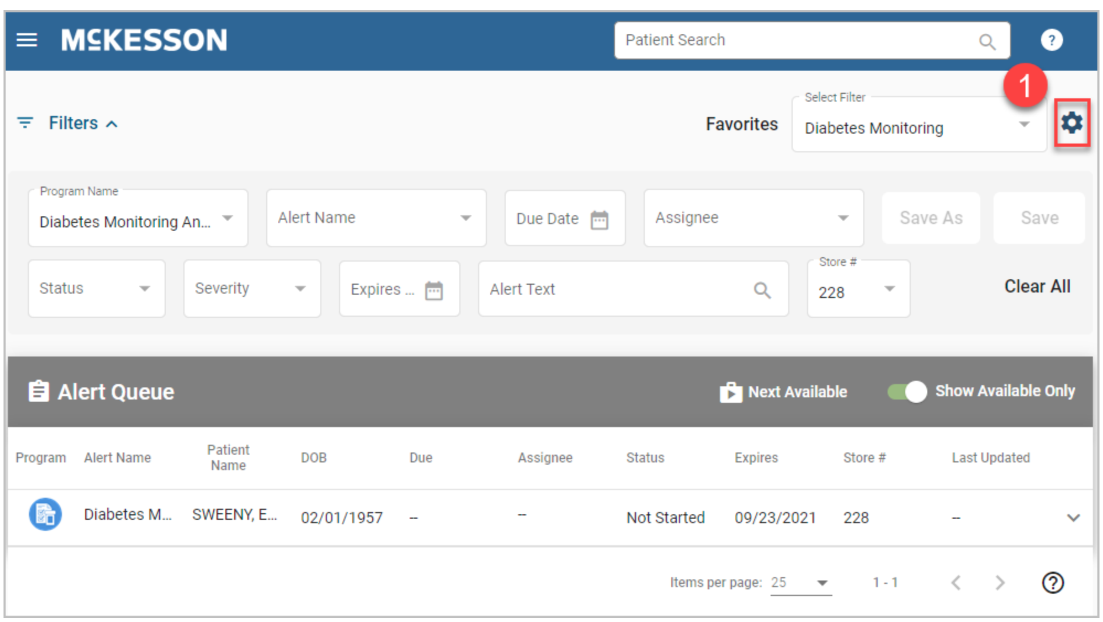


1. From the **Favorites** drop-down menu, select the favorite filter you want to edit.
2. Add or remove filter criteria in the fields.
3. Select the **Save** button to save the changes.

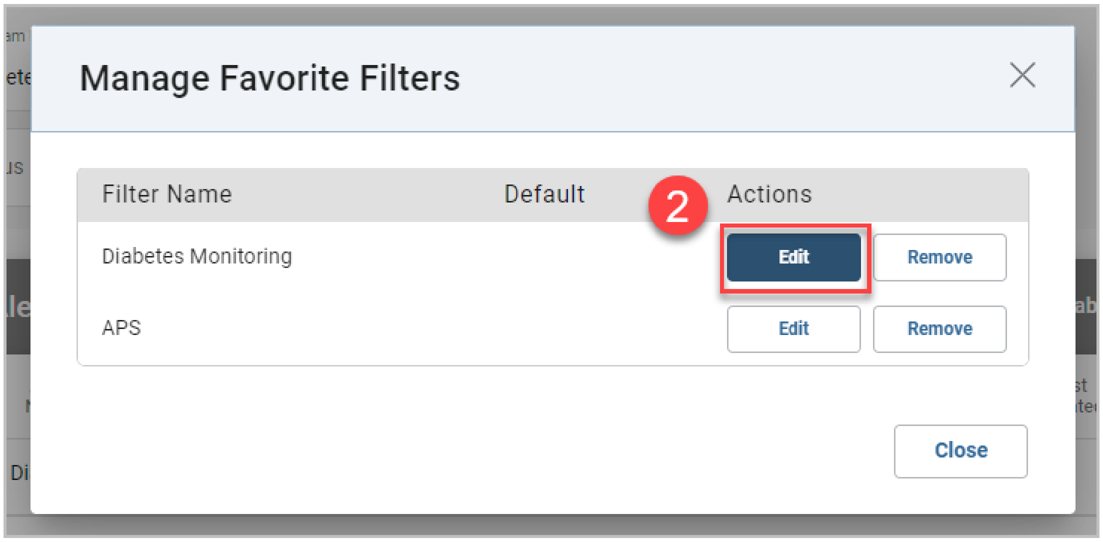
Important:
If the filter option for **Program Name**, **Alert Name**, **Assignee**, and **Store #** shows in red, it means the option is no longer available for filtering, as shown in the image below. You will have to remove the option from your favorite filter.



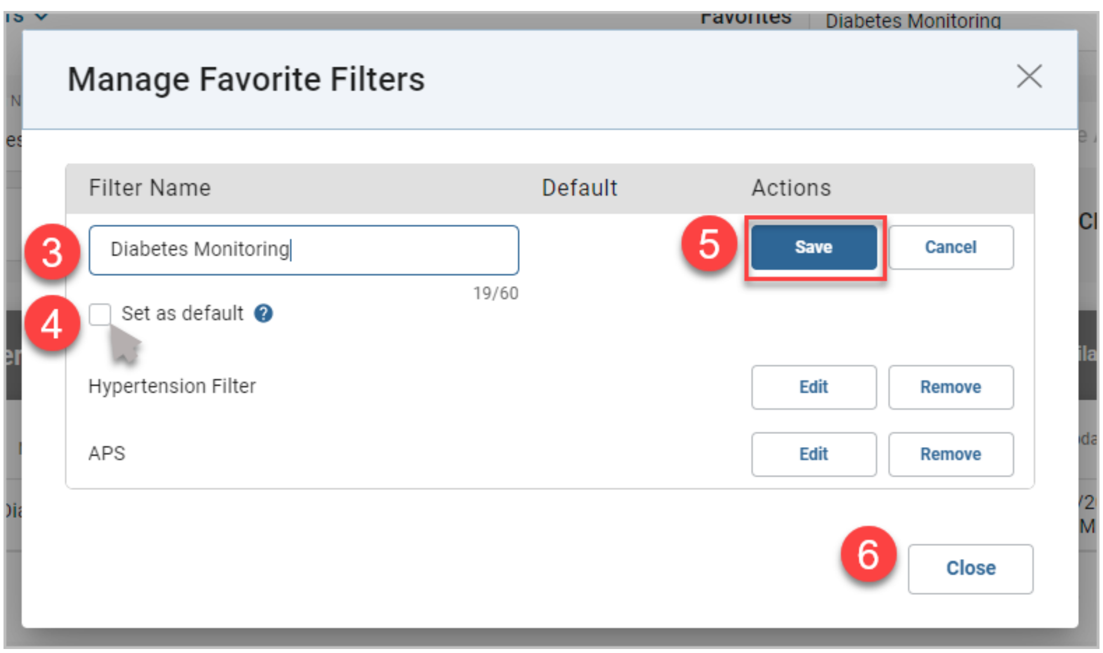
Managing Favorites Filters



1. Select the **Settings** icon ( ) and the **Manage Favorite Filters** pop-up displays.

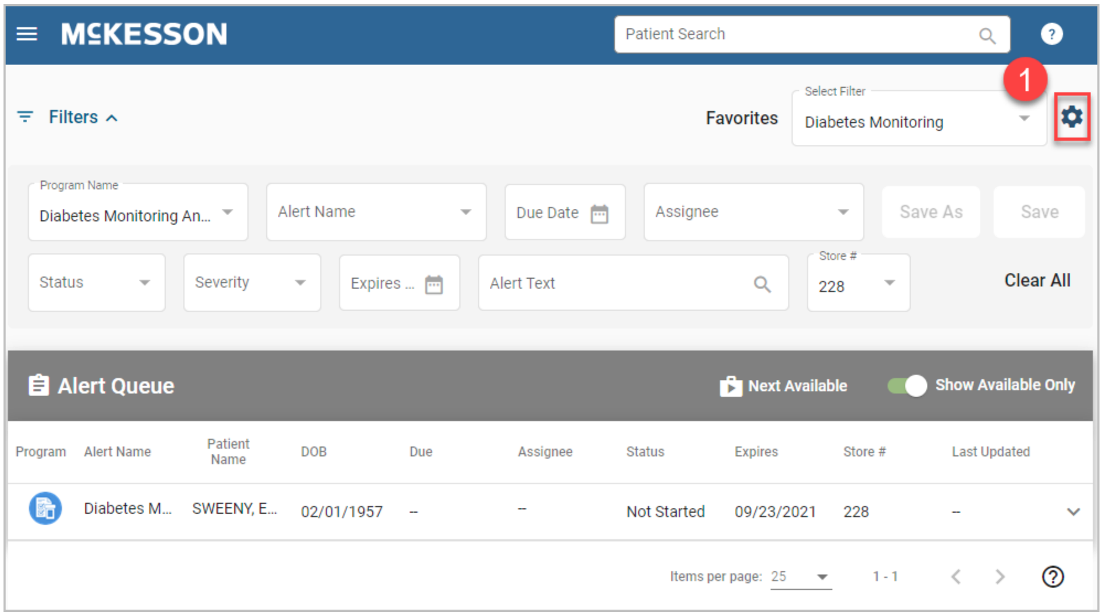


2. Select the **Edit** button next to the favorite filter you want to edit.

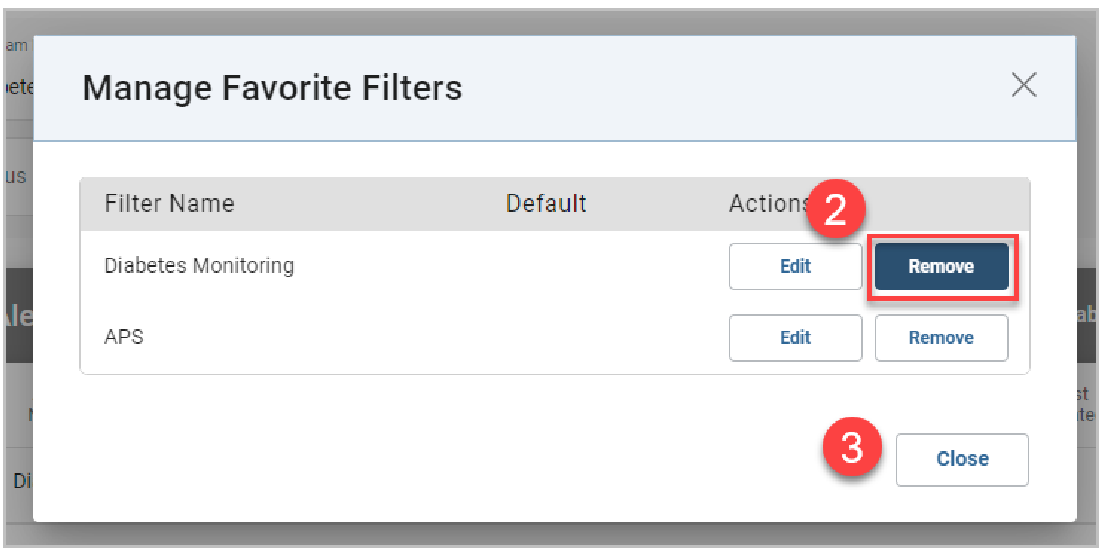


3. In the text box edit the favorite filter name, if desired.
4. Check or uncheck the **Set as default** checkbox, if desired. Only one favorite filter can have this checkbox selected at a time.
5. Select the **Save** button to save the changes.
6. To close the pop-up, select the **Close** button.

Removing Favorite Filters



1. Select the **Settings** icon () and the **Manage Favorite Filters** pop-up displays.



2. Choose the favorite filter to remove and select the **Remove** button.
3. To close the pop-up, select the **Close** button.

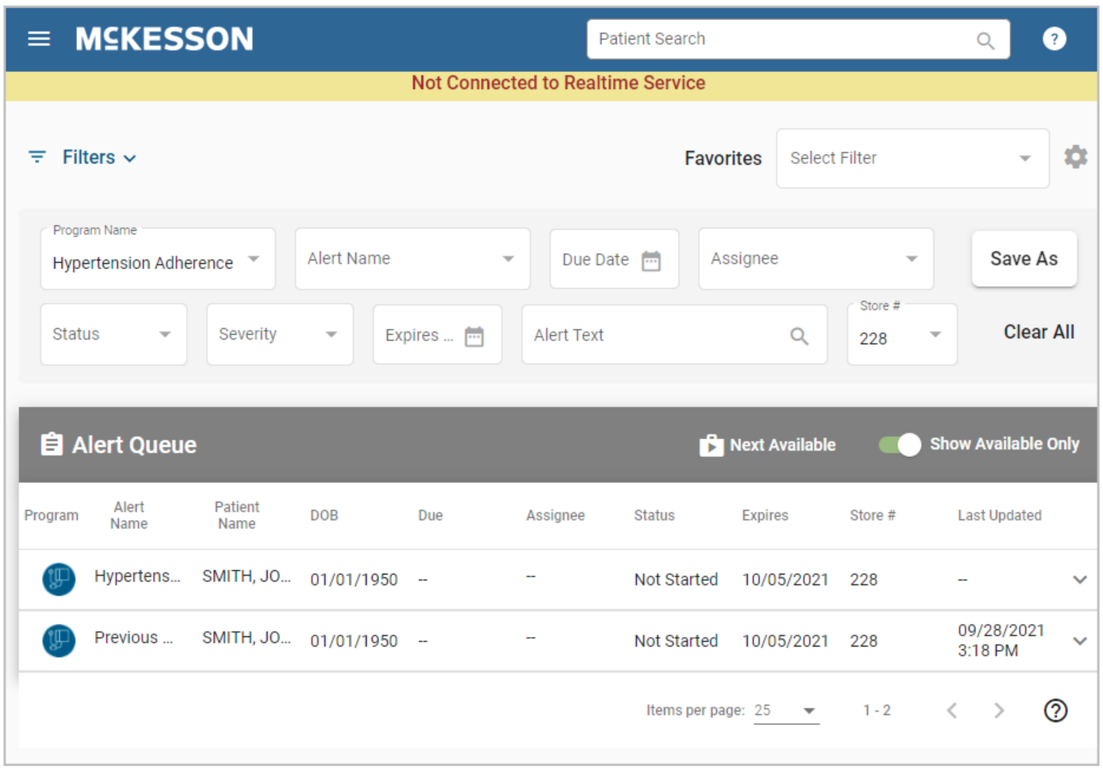
Open a Patient Profile via Alert Queue

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

For more information on the Patient Profile, please refer to "Viewing the CPS Patient Profile" on page 194.

Realtime Service Notification

When you access the **Alert Queue** and the Realtime service is down, a notification displays at the top of the window. The service may be down due to an internet outage. The warning does not prevent users from using the software, however you will not see any updates in real-time from other users.



Note:
When the Realtime Service is down the notification also displays in the other windows of the software.

Chapter 11: Viewing the CPS Patient Profile

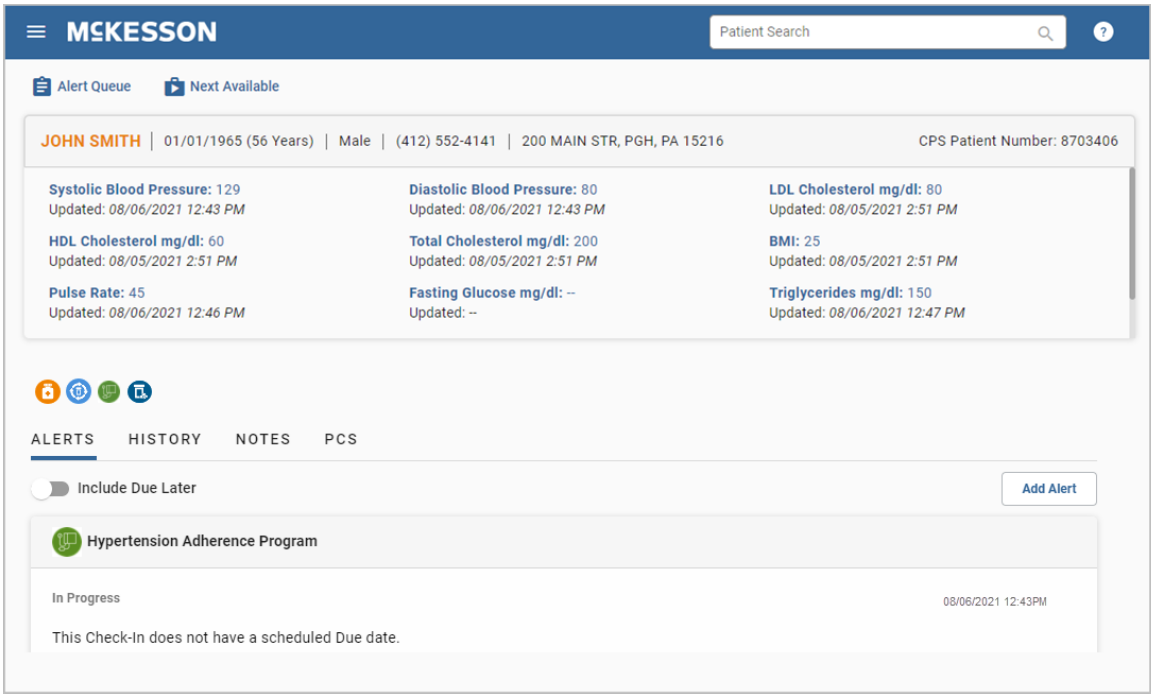
In addition to viewing Alerts within the **Clinical App** and **Alert Queue**, you can also view a patient's particular CPS information directly from the **Patient Profile**. The **Patient Profile** not only provides information on Program Enrollments and Program Alerts, but also allows you to record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

Tasks in the CPS Patient Profile

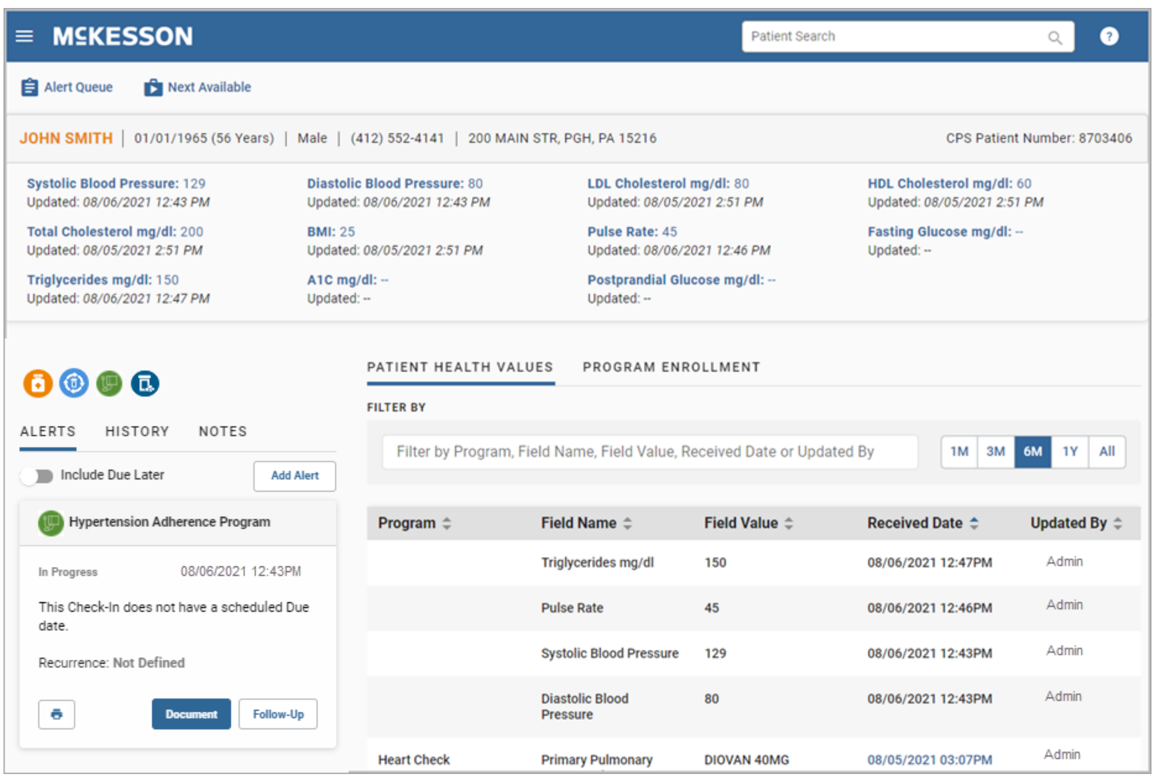
Sizing the Patient Profile Window

The **Patient Profile** window can be viewed at different sizes and has the ability to adjust responsively to take into account different resolution displays.

The first example below is the default layout of the **Patient Profile** when a patient is accessed from the **Alert Queue.**

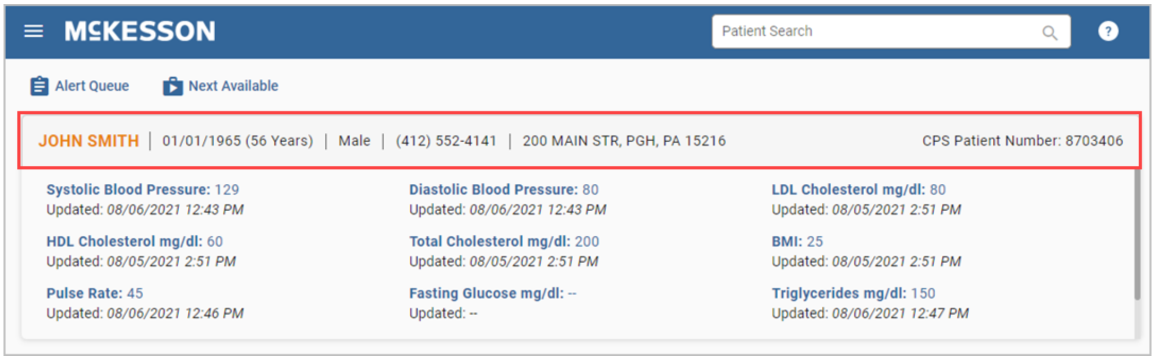


The second example below is the layout of the **Patient Profile** when the window is resized to a bigger size.



Viewing the Patient's Demographics

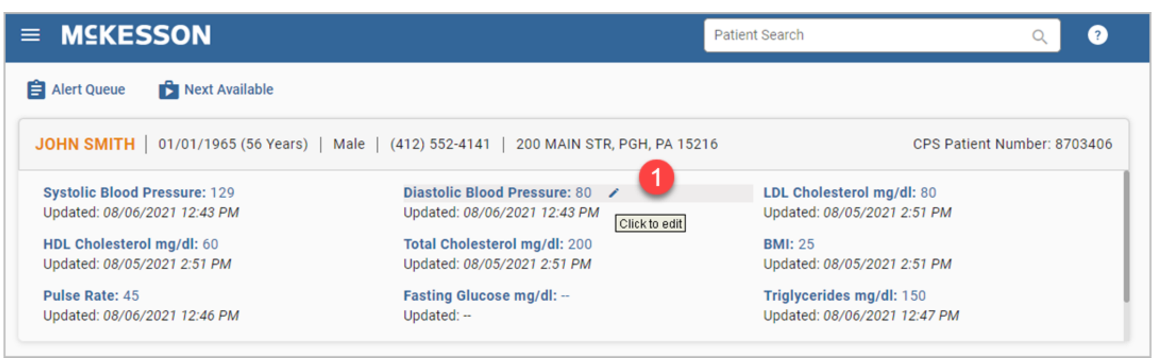
The patient's demographics information is displayed at the top of the **Patient Profile**. It includes Patient Name, DOB, Sex, phone number, address and CPS Patient Number.



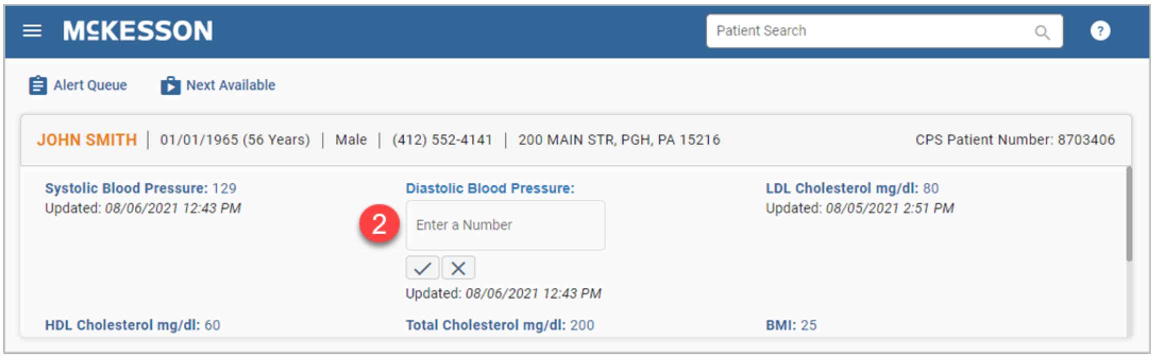
Recording New Standard Values

The standard fields that display below the patient demographics in the **Patient Profile** can be used to record frequently captured values for patients. For each field, the most recent value belonging to the patient will be displayed, along with the date and time the value was recorded.

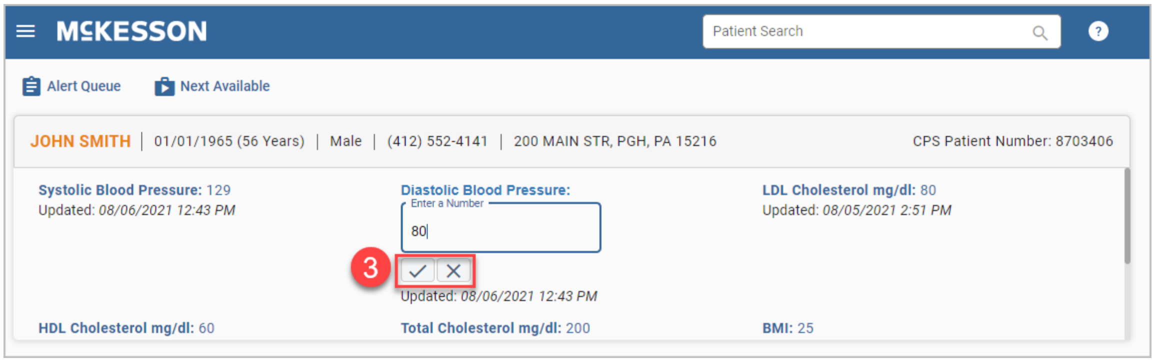
Note:
The display of standard fields can be customized to match the needs of your pharmacy. For more information on customizing standard fields, please refer to "Patient Profile Configuration" on page 111.



1. Hover over the appropriate 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. Enter the desired value in the selected field.



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

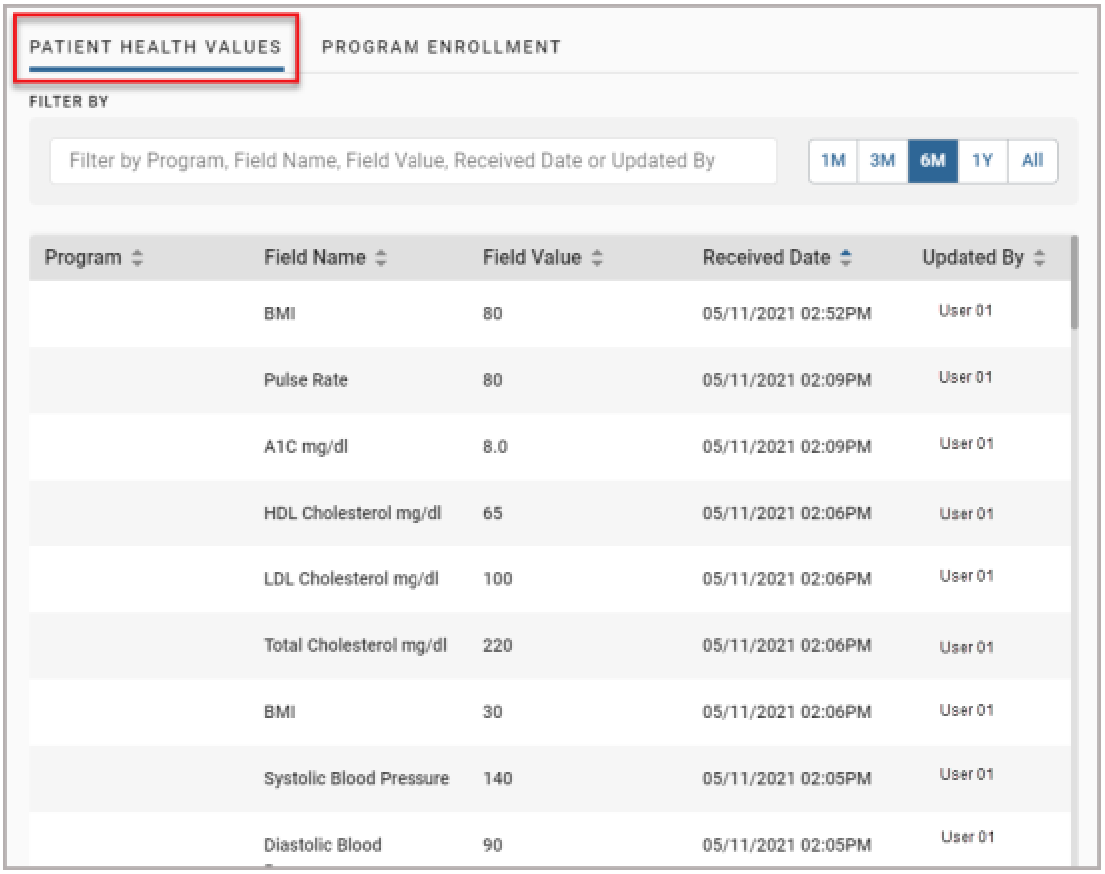
The following rules apply to **Custom Standard Fields**:

- When editing a **Numeric Custom Standard Field**, you will be able to enter a maximum of 10 numeric characters with commas and/or decimal points. You will not be able to enter alpha characters.
- When editing a **Text Standard Custom Field**, you will be able to enter a maximum of 100 alpha, numeric and/or special characters.
- When editing a **Phone Number Custom Standard Field**, you will need to enter 10 numeric characters. The numerals will be automatically formatted in (xxx) xxx-xxxx format. If you enter less than 10 characters and try to save your changes, the field will not be updated, and your changes will be discarded.
- When editing a **Date Custom Standard Field**, you will need to enter 8 numeric characters. The numerals will be automatically formatted in mm/dd/yyyy format. If you enter less than 8 characters and try to save your changes, the field will not be updated, and your changes will be discarded.
- When editing a **Drop-down Custom Standard Field**, you will be able to select from the list of

values configured for the field.

Viewing Historical Patient Health Values

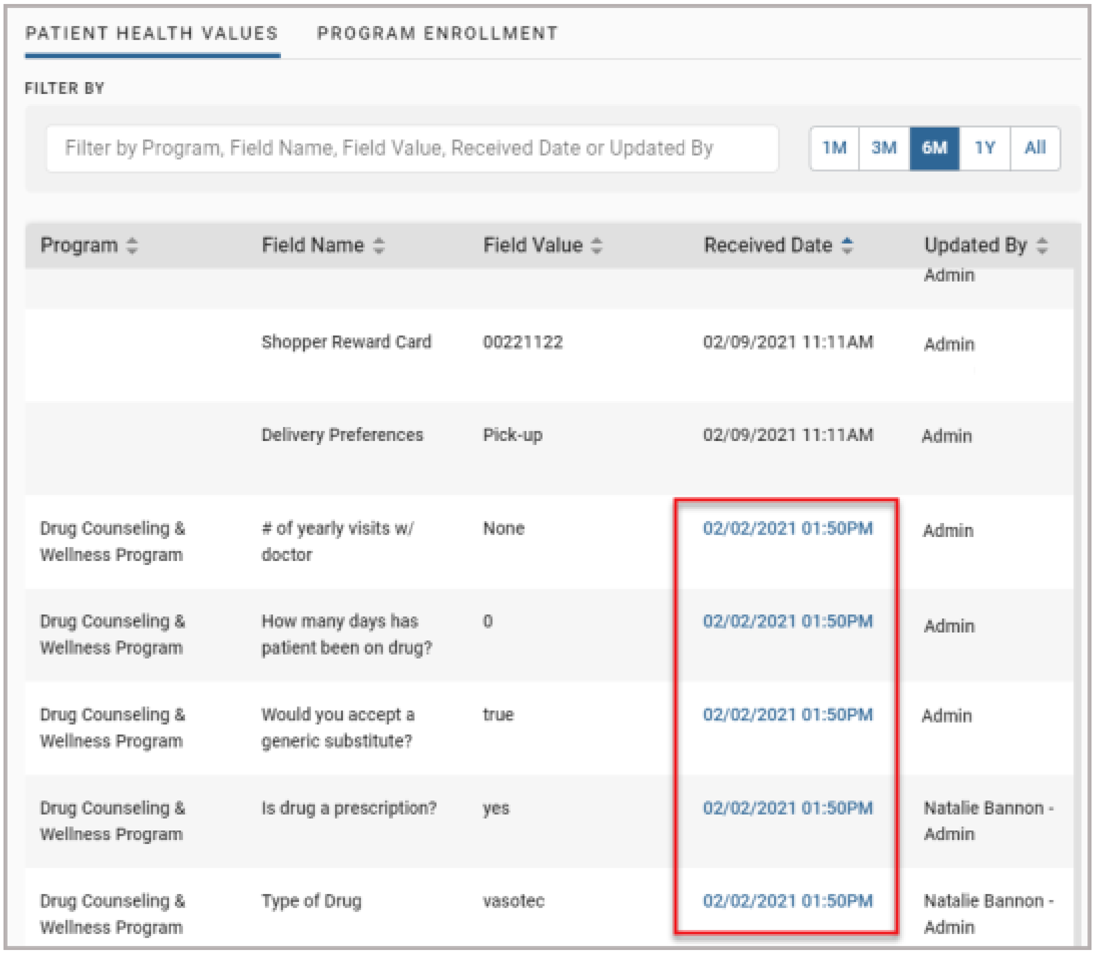
On the **Patient Health Values** tab you can view the patient's historical standard health values and you will also see any values collected using a questionnaire. Each value will have a **Received Date** and who the value was **Updated By**.



You can also specify a range, 1 month (**1M**), 3 months **(3M**), 6 months (**6M)**, 1 year (**1Y**), or **All** and filter the table to view historical patient health values that fall within that range. The default view is **6M**.

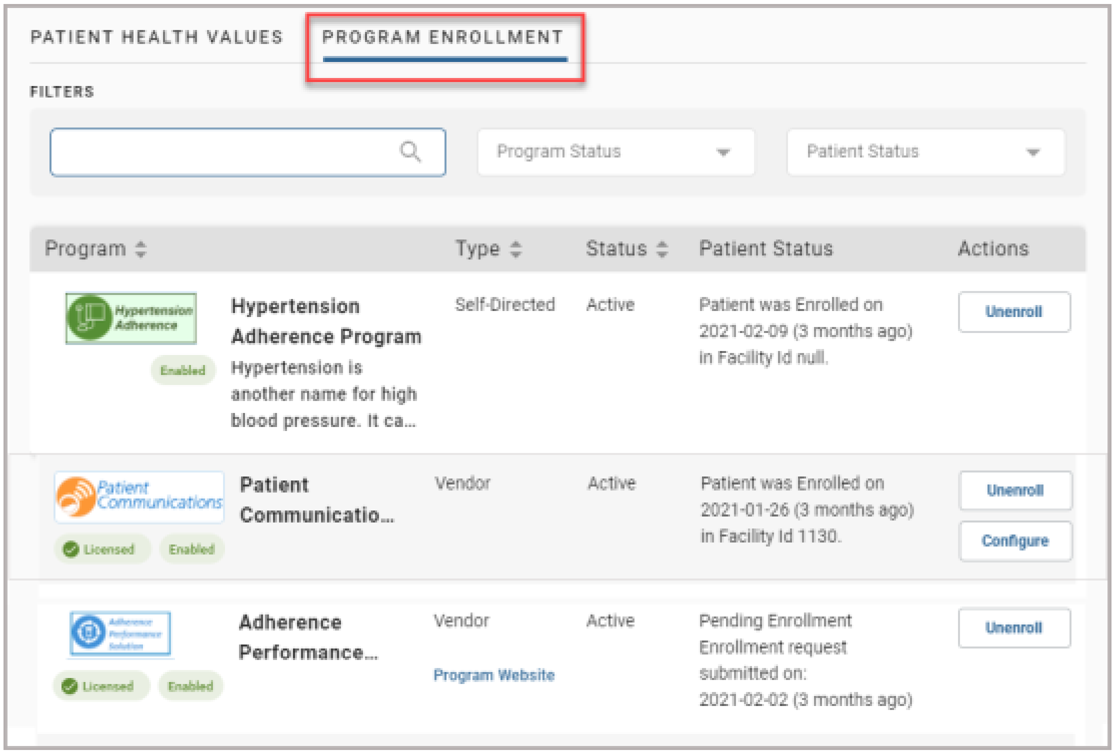
Viewing Previously Resolved or Saved In Progress Questionnaires

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.



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 active Self-Directed and Vendor Programs that require enrollment will display. From here, you can:

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

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

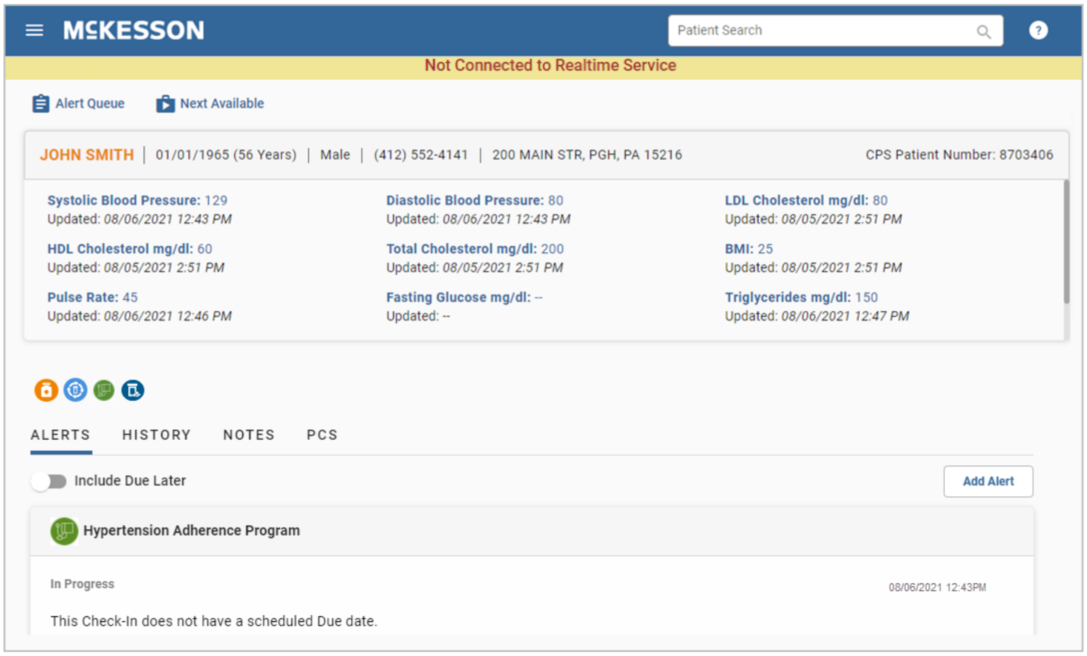
- Program name
- Program Status (Active, Inactive, All Programs)
- Patient Status (All, Enrolled, Patient Not Asked, Unenrolled, Refused, Rejected)

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.

Realtime Service Notification

When you access the **Patient Profile** and the Realtime Service is down, a notification displays at the top of the window. The service may be down due to an internet outage. The warning does not prevent users from using the software, however you will not see any updates in real-time from other users.



Note:
When the Realtime Service is down the notification also displays in the other windows of the software.

Chapter 12: 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.

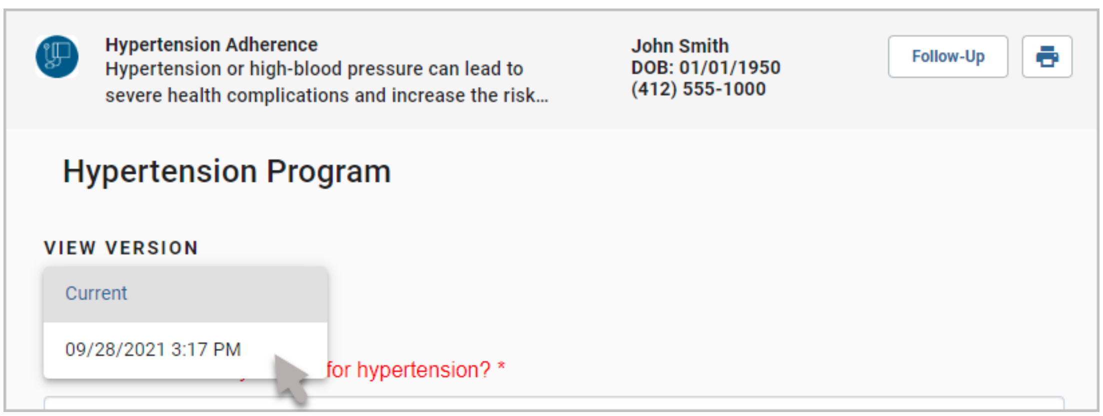
Tasks in an Alert's Questionnaire

- "Viewing Current and Resolved Questionnaires" below
- "Adding a Follow-Up Comment and/or Due Date Change via a Questionnaire" on the next page
- "Printing Questionnaires" on page 206

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.

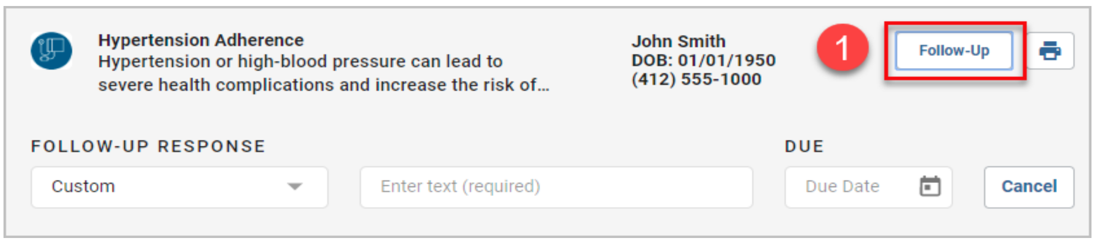


You can toggle between the current questionnaire and, at most, 26 previously resolved questionnaires by selecting a questionnaire in the **View Version** drop-down.

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

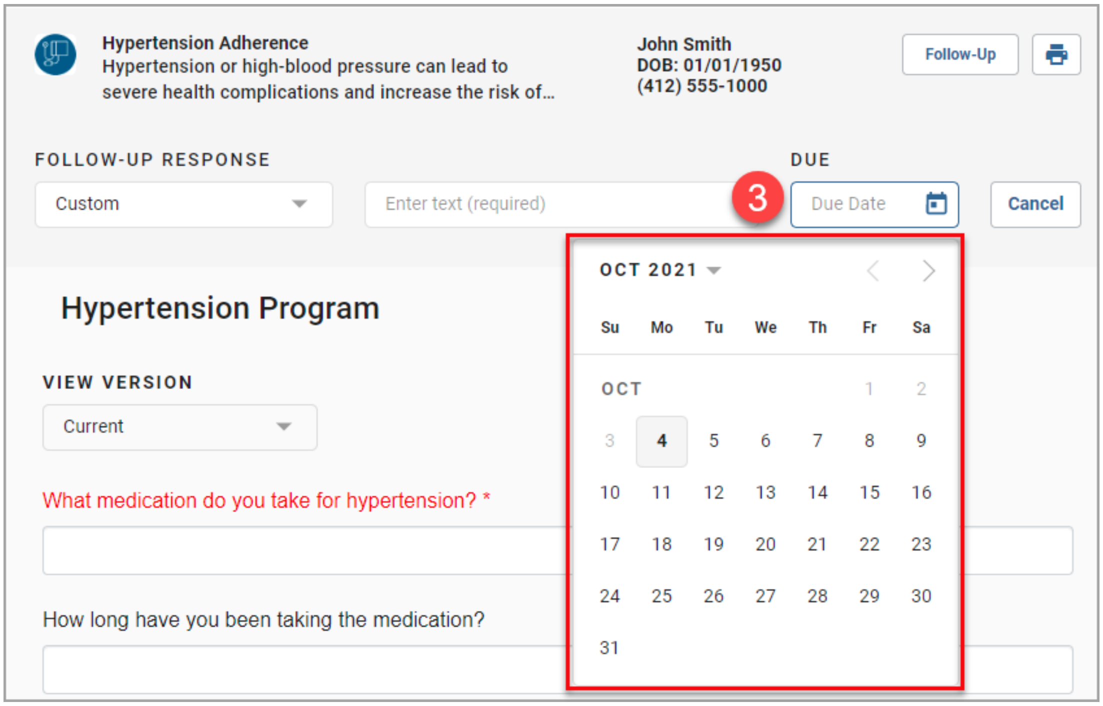
The **Follow-Up** button in a questionnaire allows you to select a response to remind yourself, or someone else, to take action at a later time. The **Follow-Up** button also allows you to change the due date for the Alert. This functionality is useful when a patient may not be at the pharmacy or available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

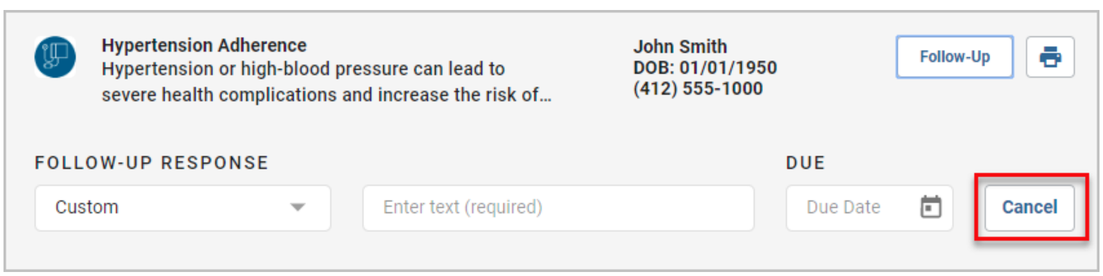
2. Enter the information for the Follow-Up. From the **Follow-Up Response** drop-down select a pre-defined response for the questionnaire or select **Custom** and enter required custom text in to text box.



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.

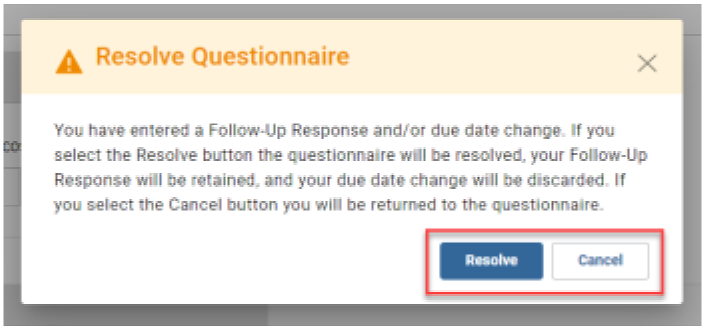


Next, the result of a Follow-Up Response and/or due date change will differ depending upon if you select the **Save Progress** or **Resolve** button in the questionnaire:

- 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.

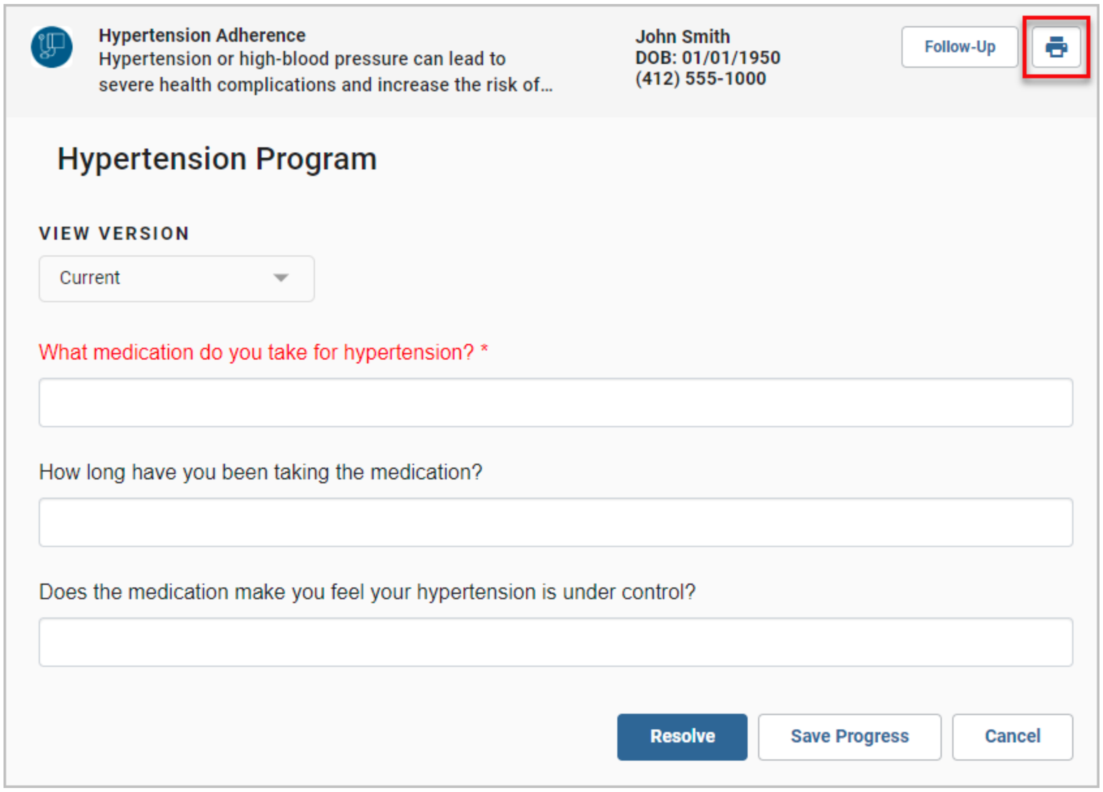
Note:
When a questionnaire associated to an Alert is saved, the Alert's status will be updated to **In Progress**.

- 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



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

Chapter 13: 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.

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

Tasks for CPS Groups

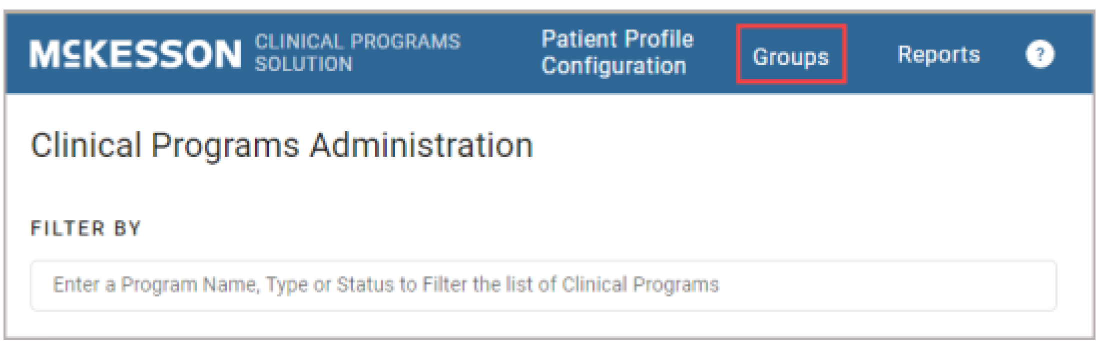
- "Accessing CPS Groups" below
- "Adding a Group" on the next page
- "Editing a Group" on page 210
- "Removing a Group" on page 211

Accessing CPS Groups

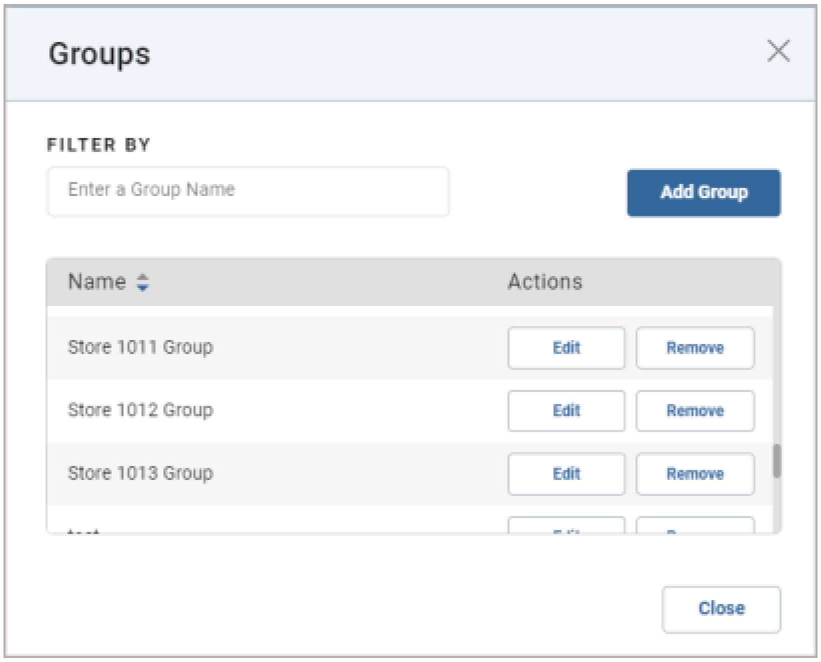
To access **Groups**, navigate to **CPS Program Admin.**

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

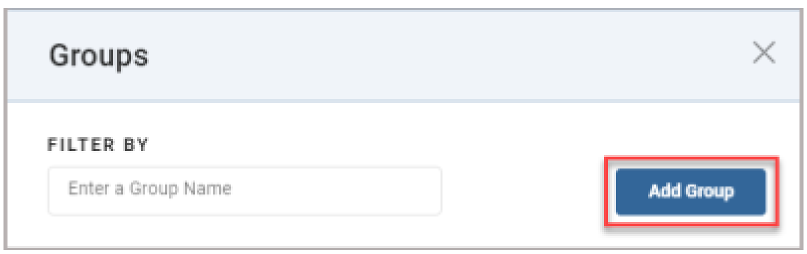
Select the **Groups** option.



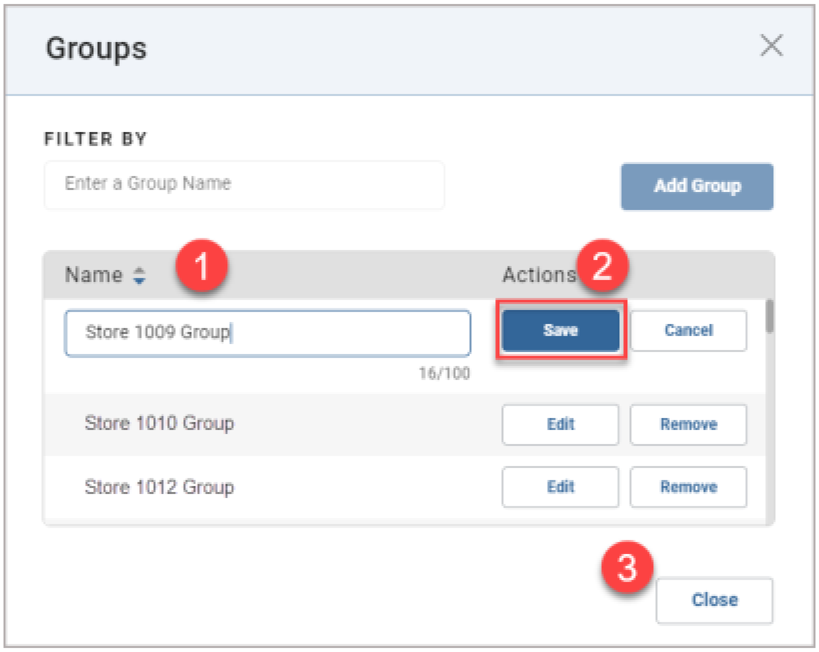
The **Groups** window opens.



Adding a Group



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



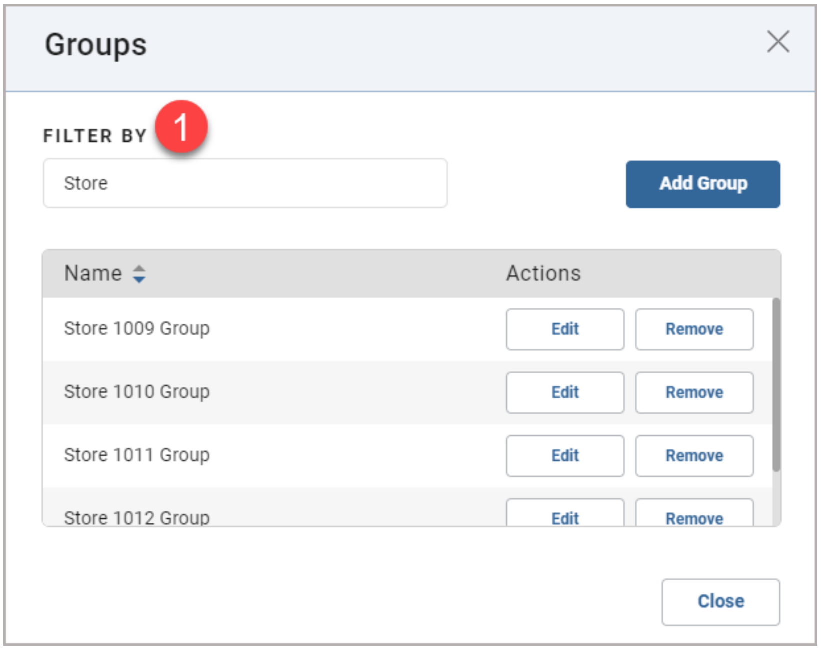
1. In the field enter the group name.
2. Select the **Save** button to save the new group.

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

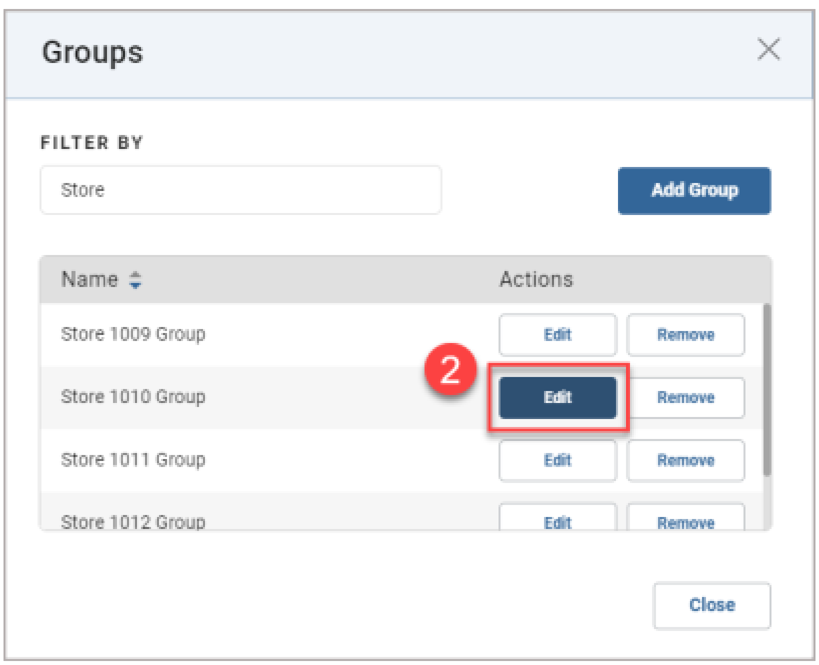
3. Select the **Close** button to close the window and go back to the **CPS Program Admin.**

To edit or remove groups follow the steps in "Editing a Group" on the next page and "Removing a Group" on page 211.

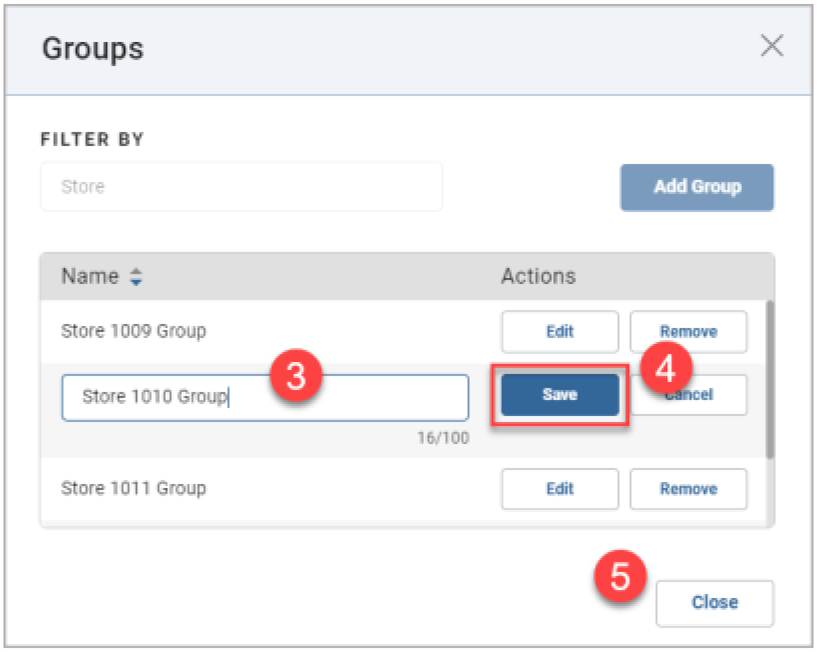
Editing a Group



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.

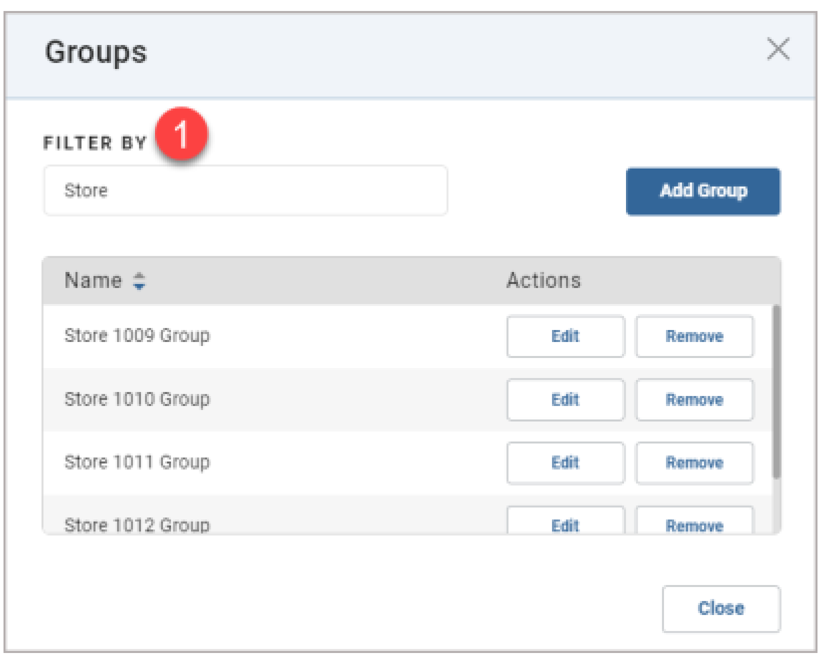


2. Select the **Edit** button next to the group you want to edit.

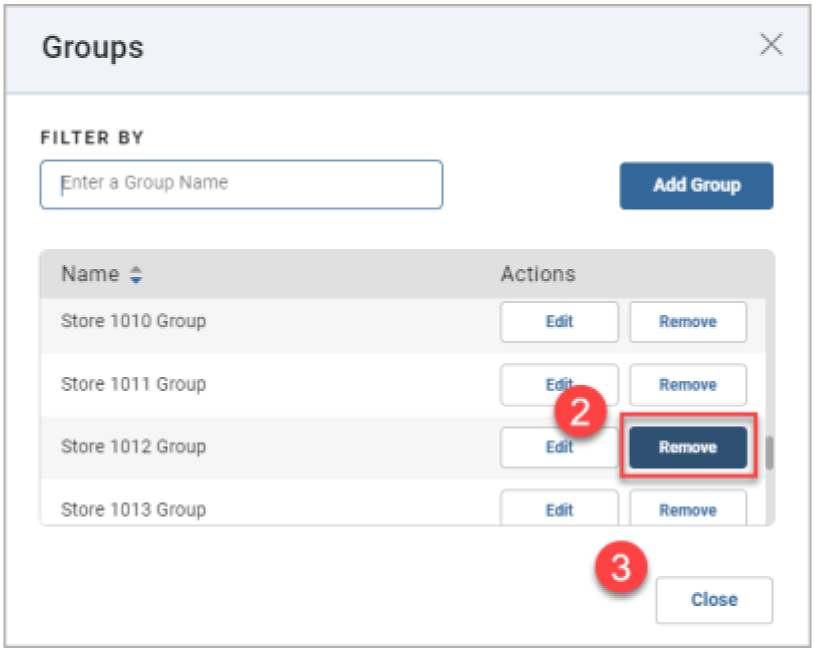


3. In the text box edit the group name.
4. Select the **Save** button to save the edited group.
5. Select the **Close** button to close the window and go back to the **CPS Program Admin**.

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**.

Chapter 14: 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

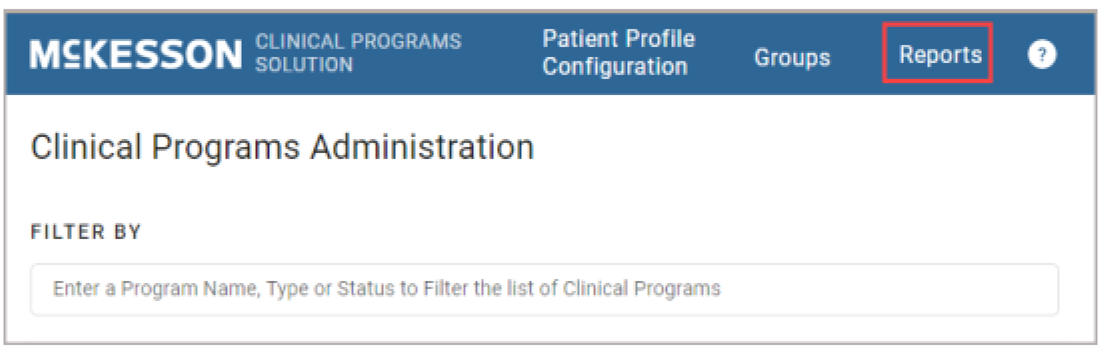
- "Accessing CPS Reports" below
- "Entering Report Parameters" on the next page
- "Generating the Report" on page 216
- "Downloading the Report" on page 217

Accessing CPS Reports

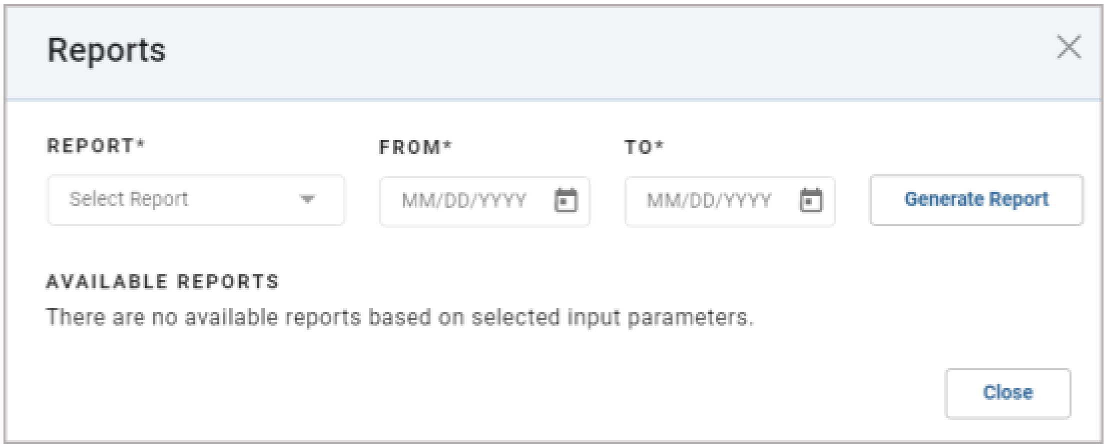
To Access **CPS Reports**, Navigate to **CPS Program Admin.**

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

Select the **Reports** option.

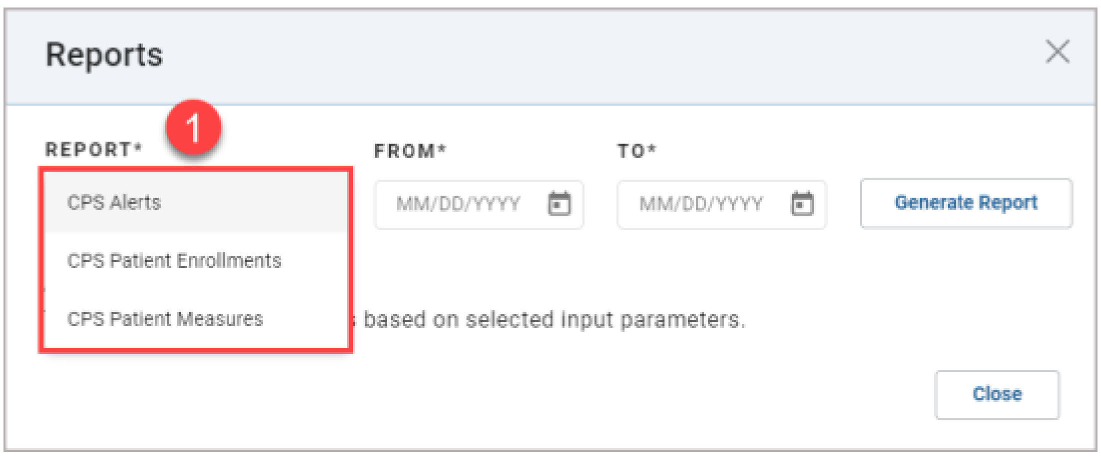


The **Reports** window will open.

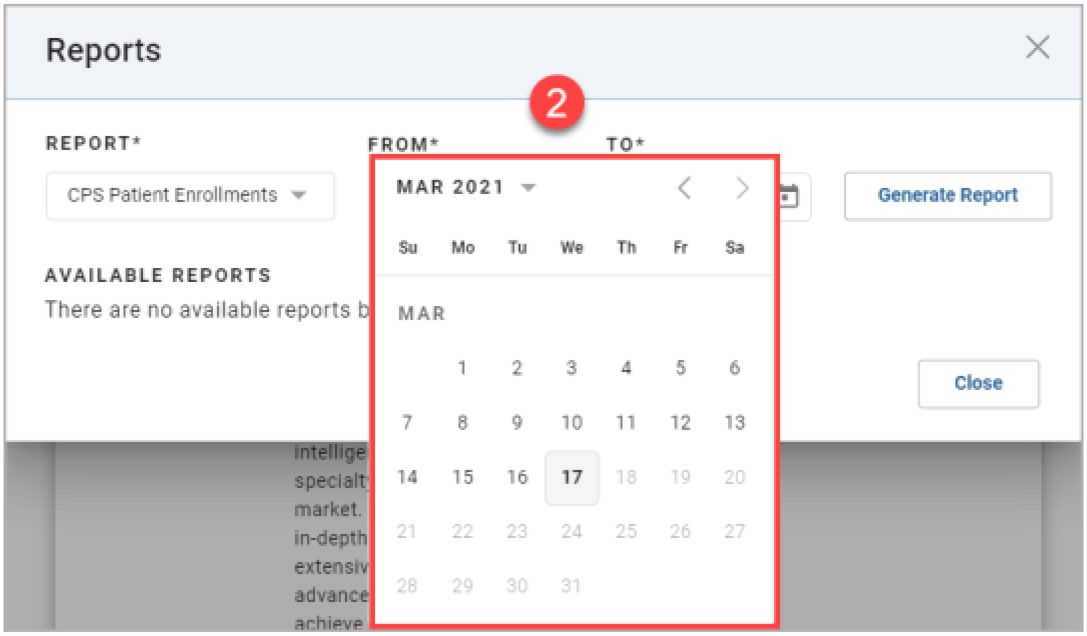


Entering Report Parameters

Enter the appropriate parameters for the report that you wish to generate. There are 3 parameters that must be entered.

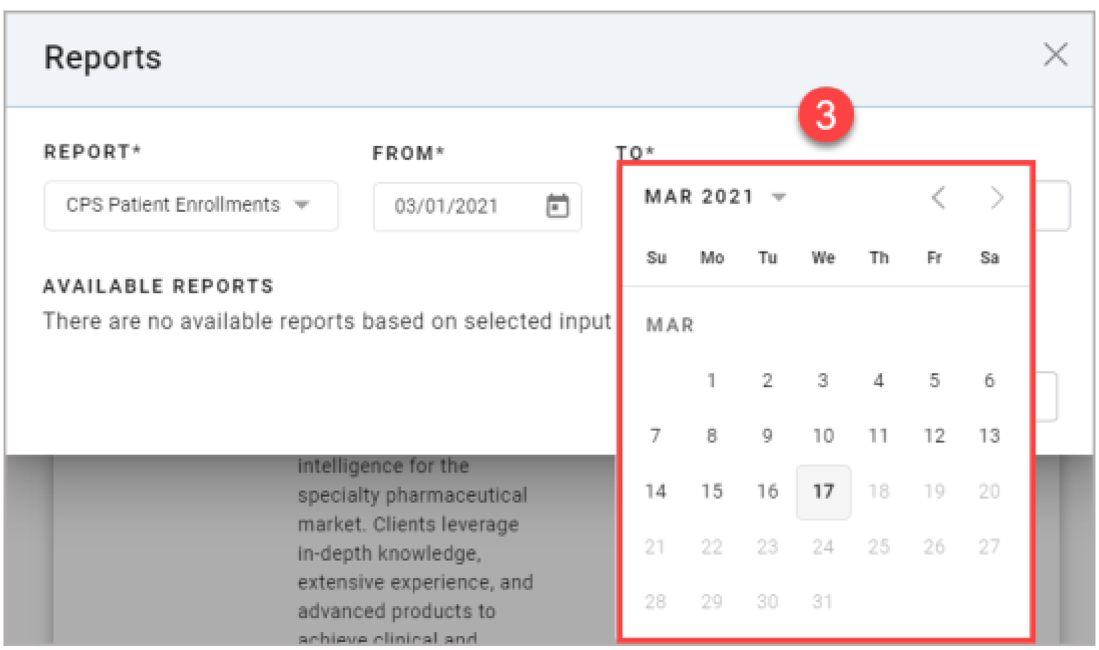


1. **Report**: Use the drop-down to select the desired type of report. There are 3 options:
   - **CPS Alerts** will contain CPS Alert activity (such as Alert status)
   - **CPS Patient Enrollments** will include patient enrollment updates (such as enrollment status)
   - **CPS Patient Measures** will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

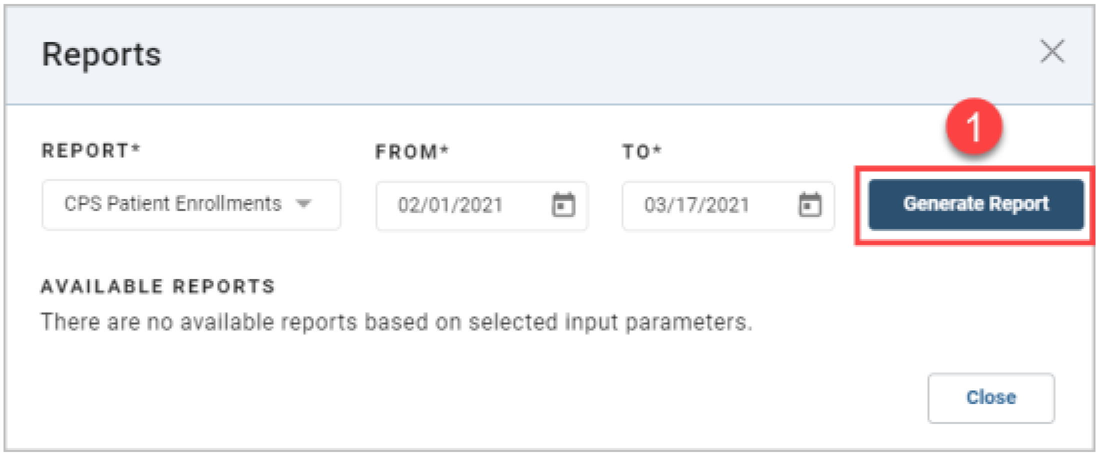


3. Enter the **To** (end) date of the report. The date can be entered by either:

   - 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.

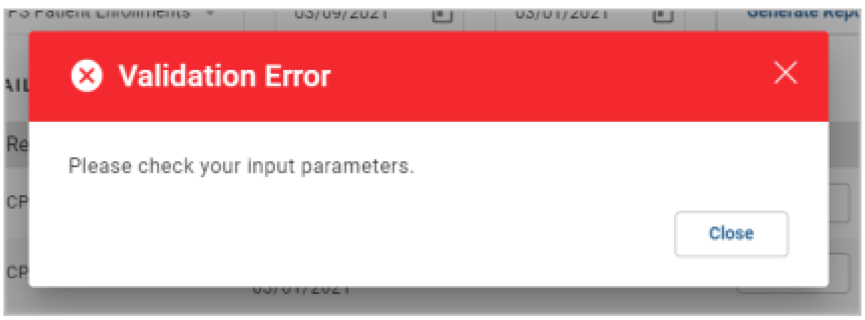
- Manually enter the desired **To** date in mm/dd/yyyy format.

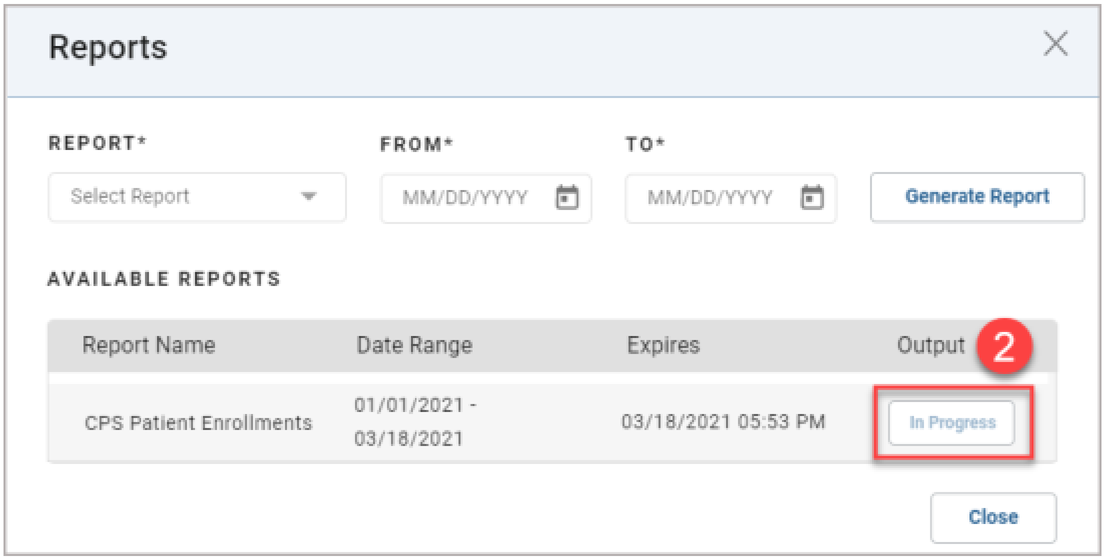
Generating the Report



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

   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.

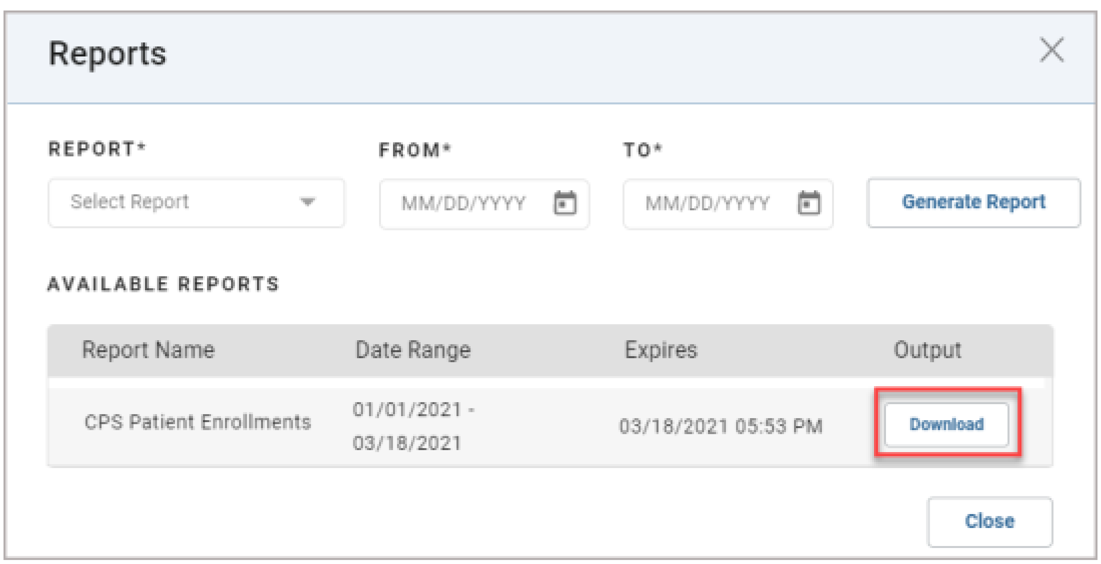




2. Subsequent to selecting the **Generate Report** button, the **Available Reports** section in the **Reports** window will update to include your most recent report.

> **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



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.

Chapter 15: 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 "CPS and APS Integration" on page 250)
- Pharmacy eCare Plan Documentation (Utilizing STRAND, see "CPS and STRAND Integration" on page 273)

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.

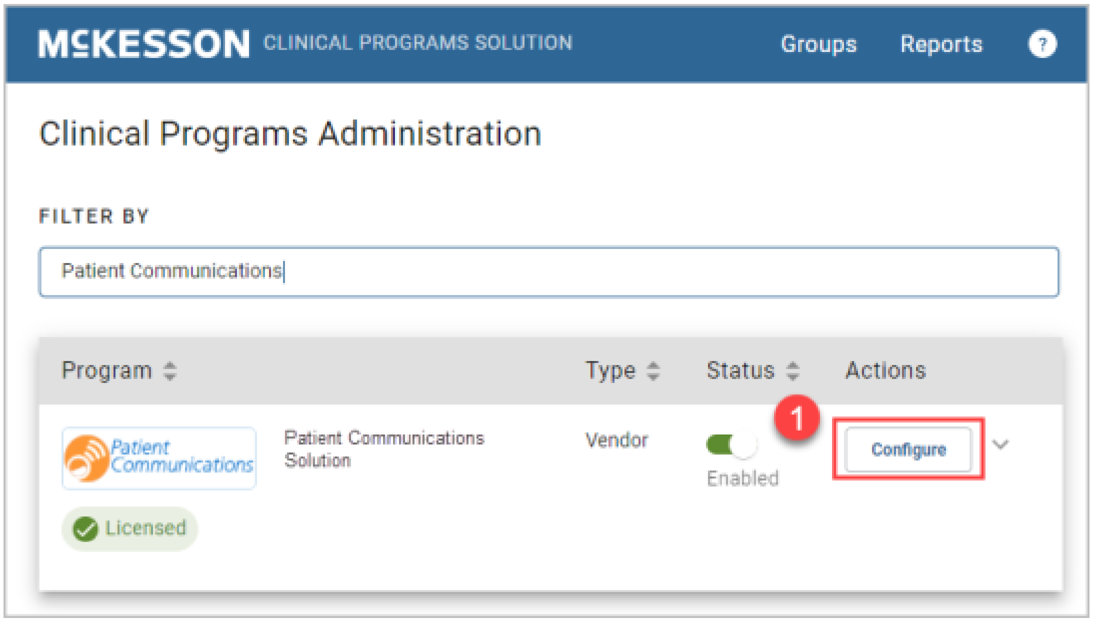
Tasks to Configure PCS

- "Getting Started with PCS Configuration" on the next page
- "General Settings" on page 222
- "Communication Preferences" on page 224
- "Notification Setup" on page 226
- "Enrolling Patients in PCS" on page 241

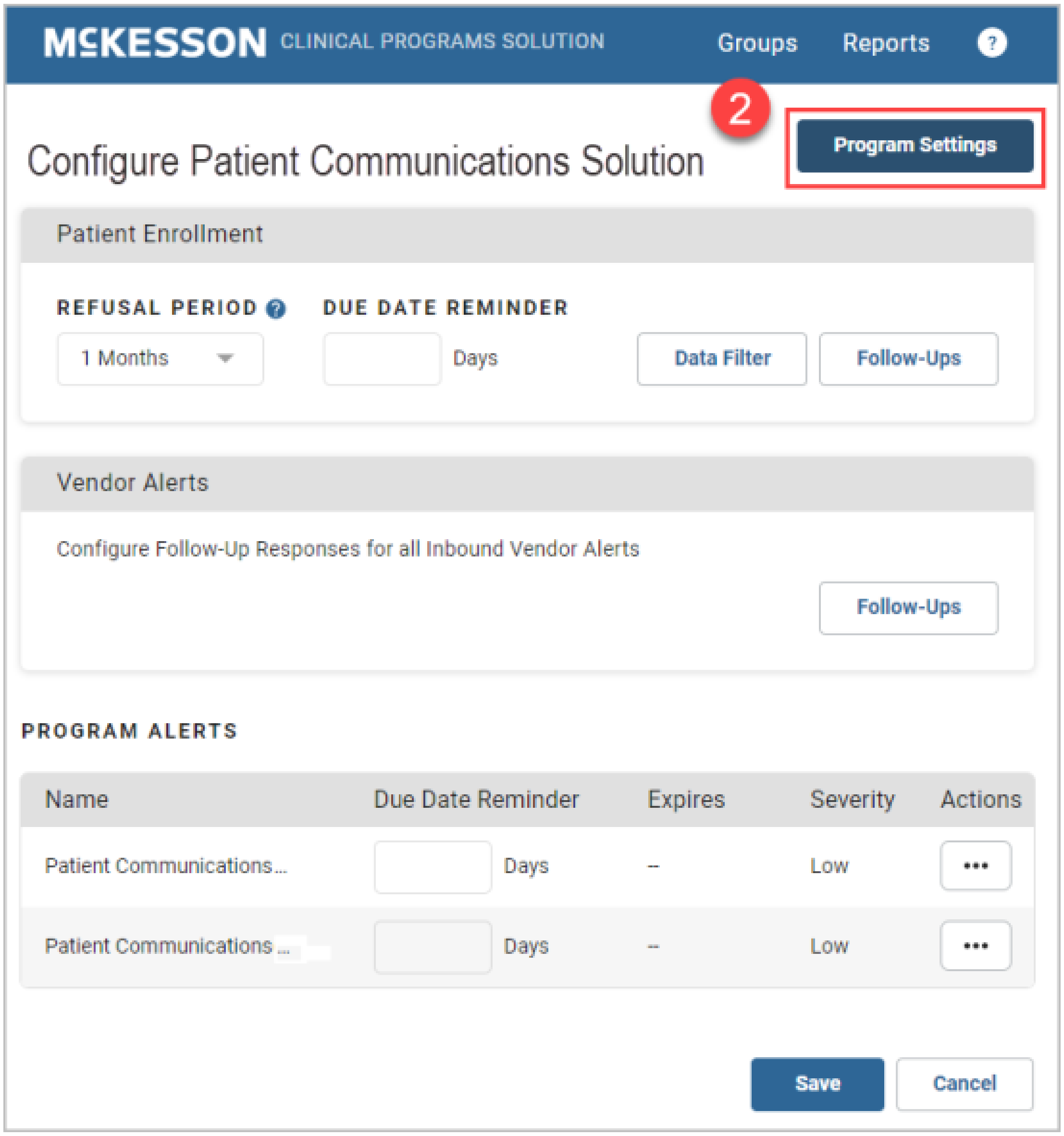
- "PCS Automatic Enrollment" on page 248

Getting Started with PCS Configuration

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



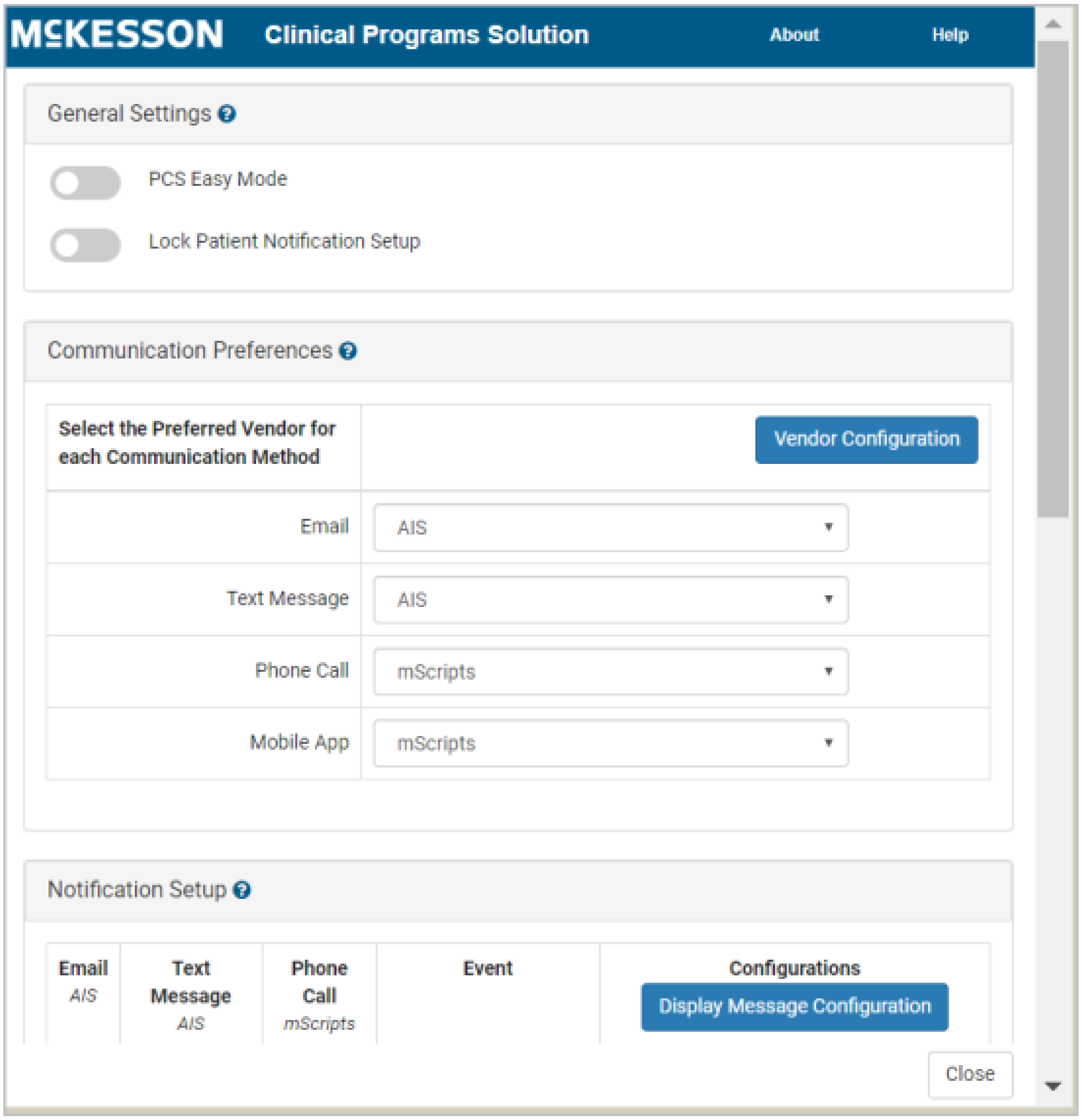
1. Once **Clinical Programs Administration** is displayed, select the **Configure** button next to the **Patient Communications Solution** Program.



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

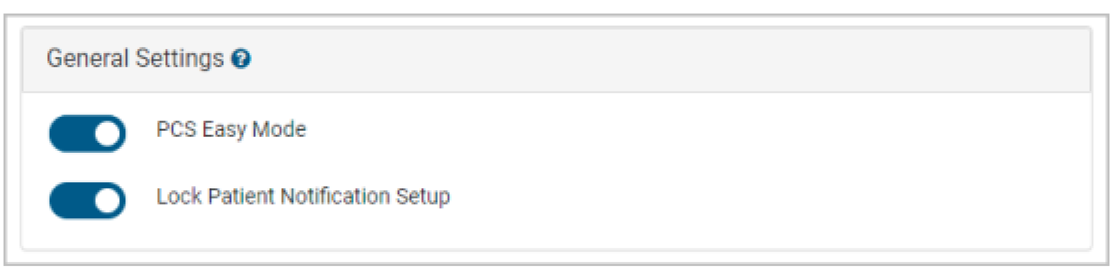
> **Note:**
> The **Program Settings** button is only available when configuring **PCS** at the corporate root level.

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



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**.

- 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.

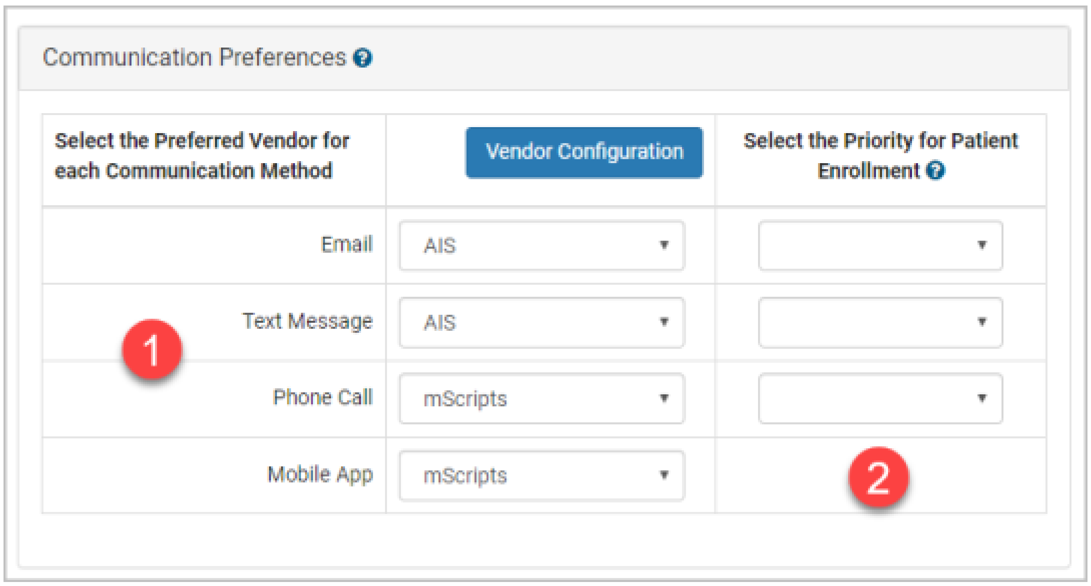
> **Note:**
> By default, the **Lock Patient Notification Setup** toggle is turned on when the **PCS Easy Mode** toggle is set to on. The **Lock Patient Notification Setup** toggle can be turned off if desired.

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.



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**

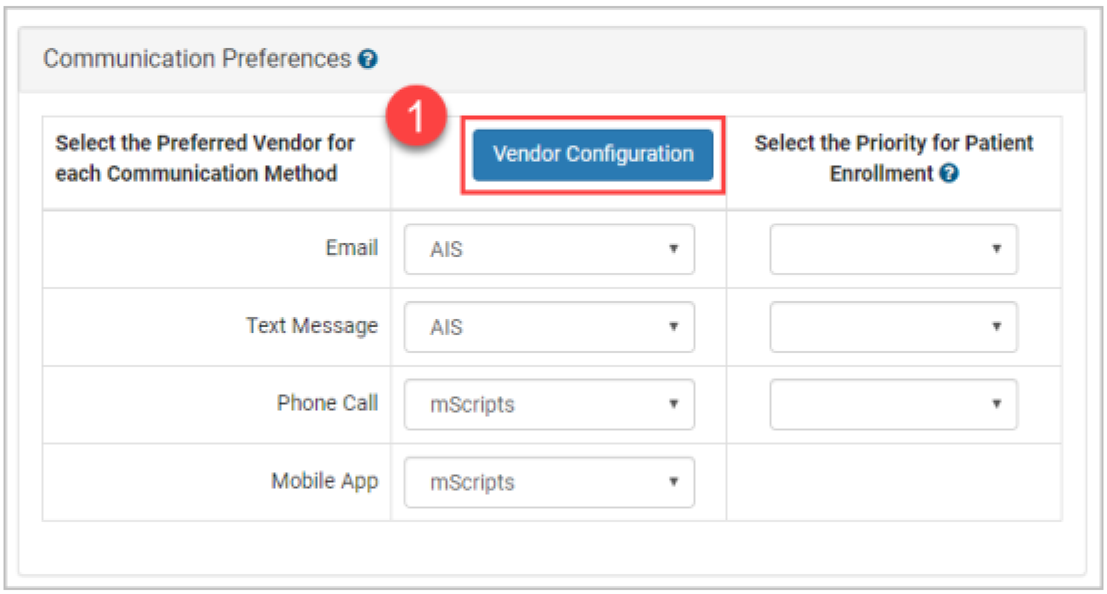
Portal.

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

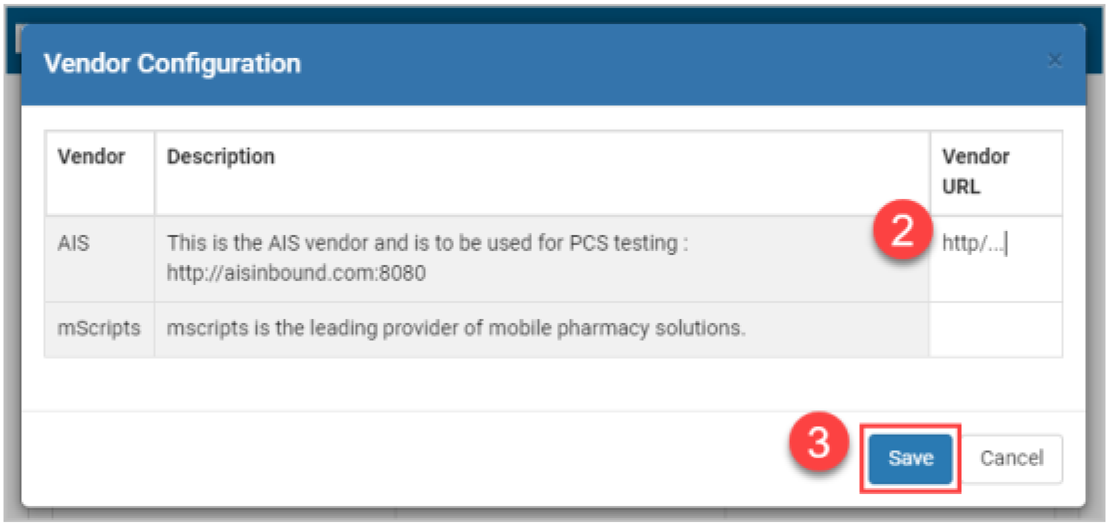
Vendor Configuration

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.



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.

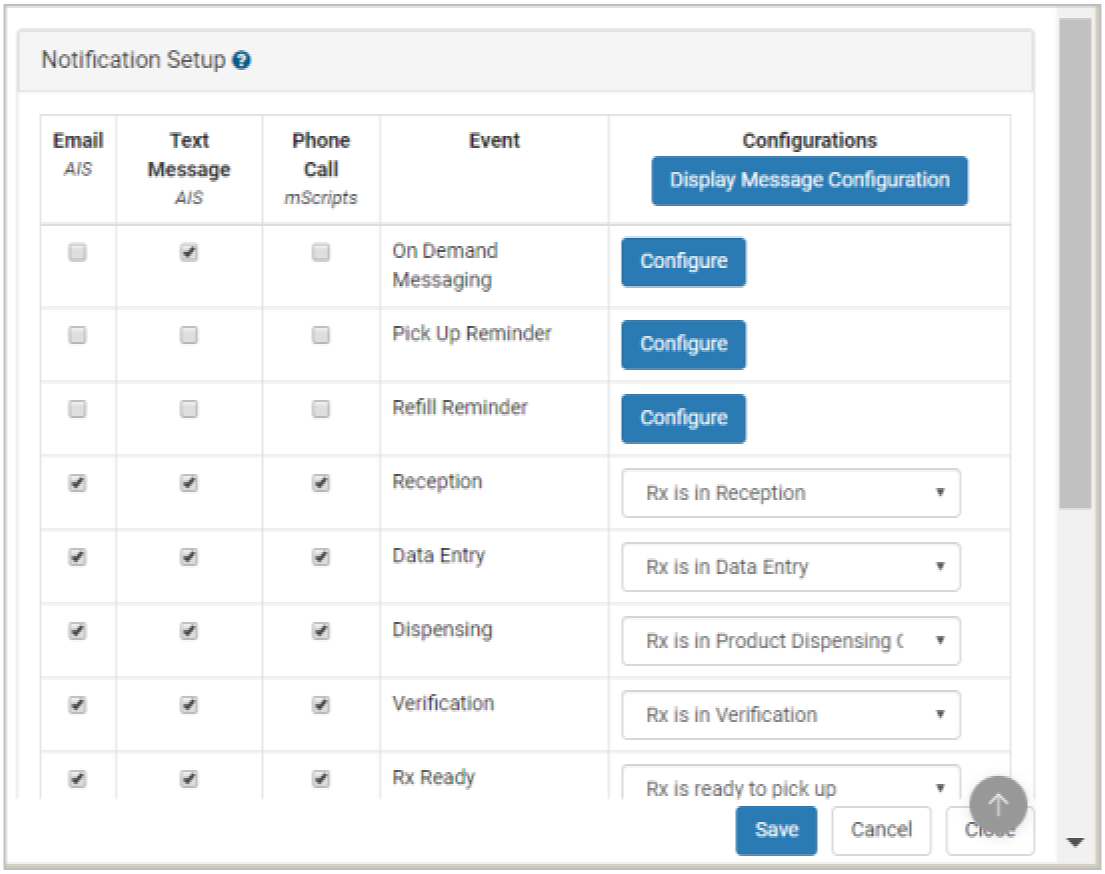
3. Select the **Save** button to save your changes, or the **Cancel** button to return to the **Program Settings** window without saving any changes.

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:

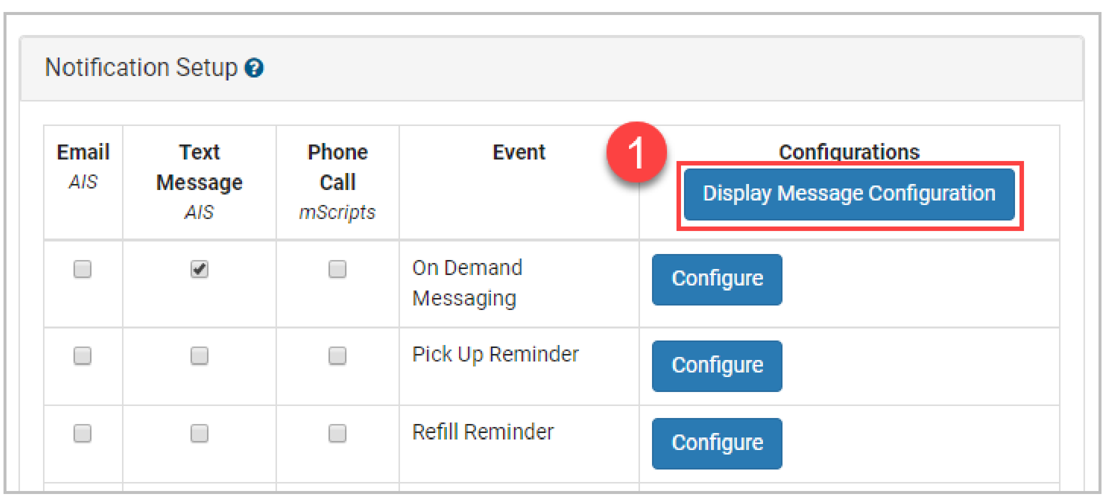
- "Display Message Configuration" on the next page
- "On Demand Messaging, Pick Up Reminder, and Refill Reminder Settings" on page 231
- "Communication Method Selection for Events" on page 239
- "Display Message Selection for Events" on page 240



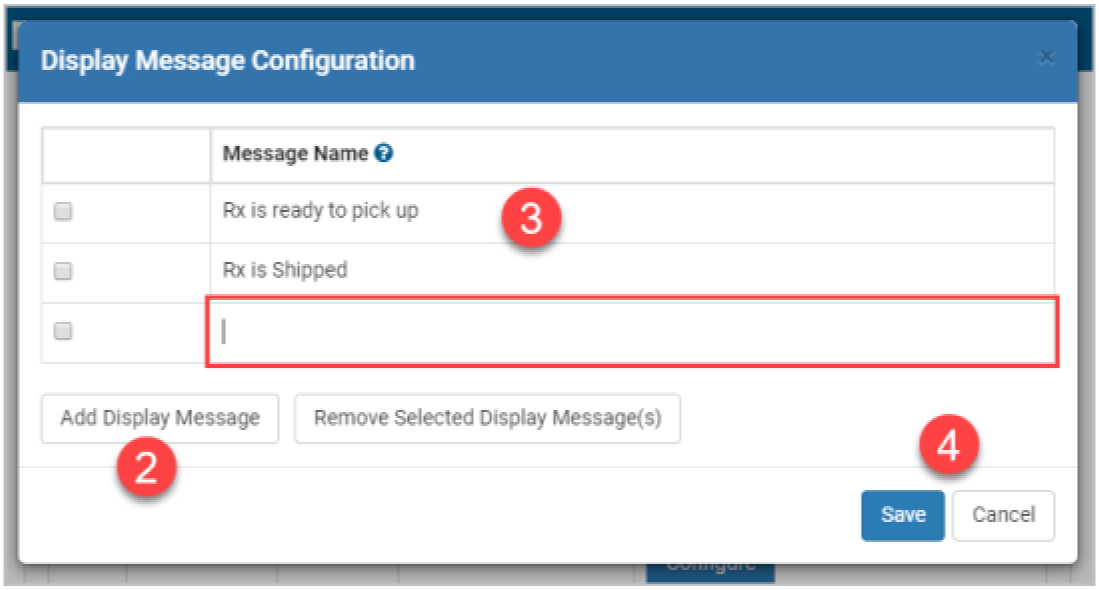
Display Message Configuration

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

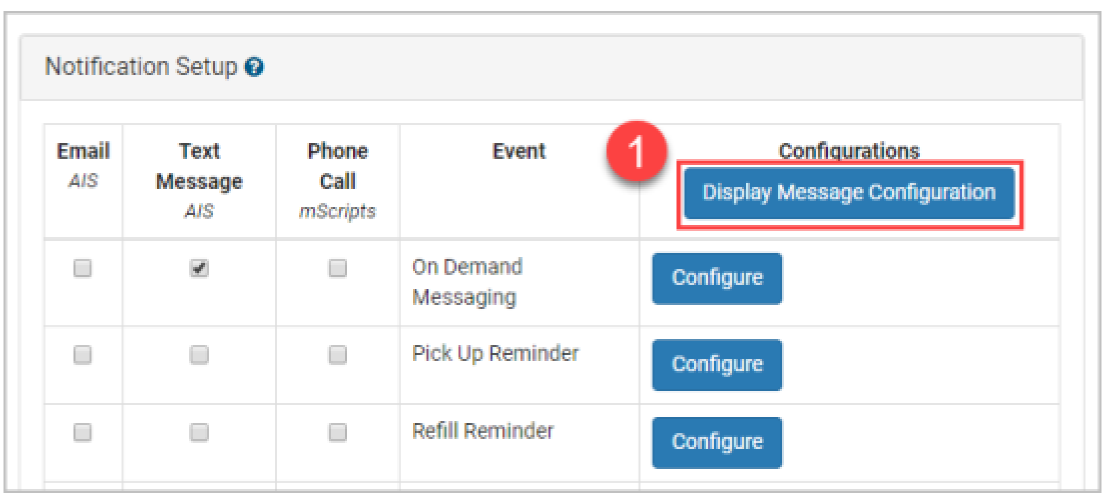


1. To add a **Display Message**, select the **Display Message Configuration** button in the **Notification Setup** section. The **Display Message Configuration** window displays.

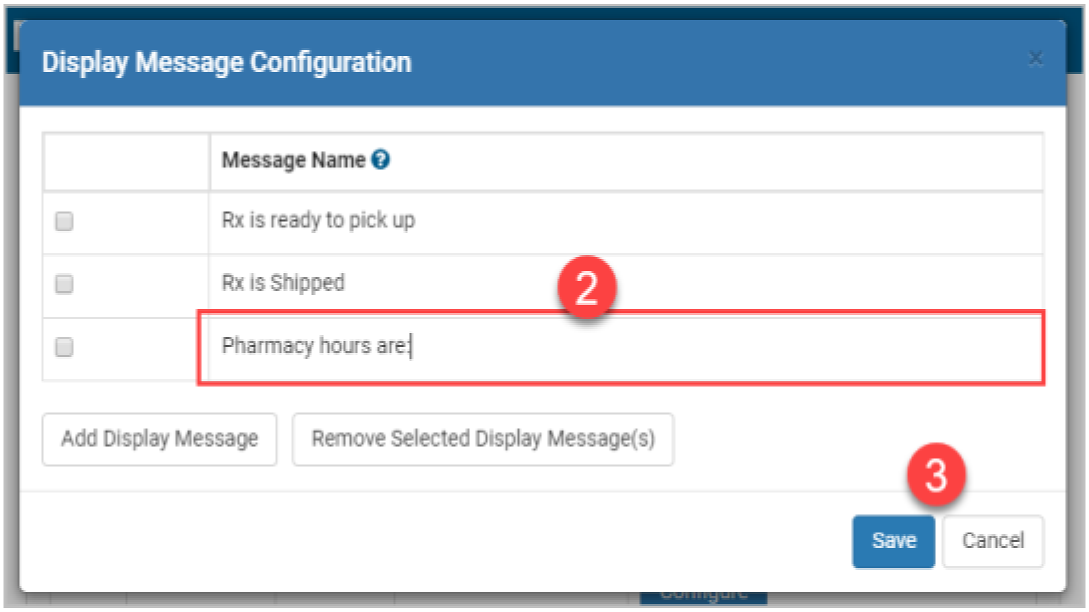


2. Scroll to the bottom of the **Message Name** list, if applicable and select the **Add Display Message** button. A new row appears at the bottom of the **Message Name** list.
3. Enter the desired **Display Message** text in the **Message Name** column.
4. Continue to add **Display Messages** by repeating 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



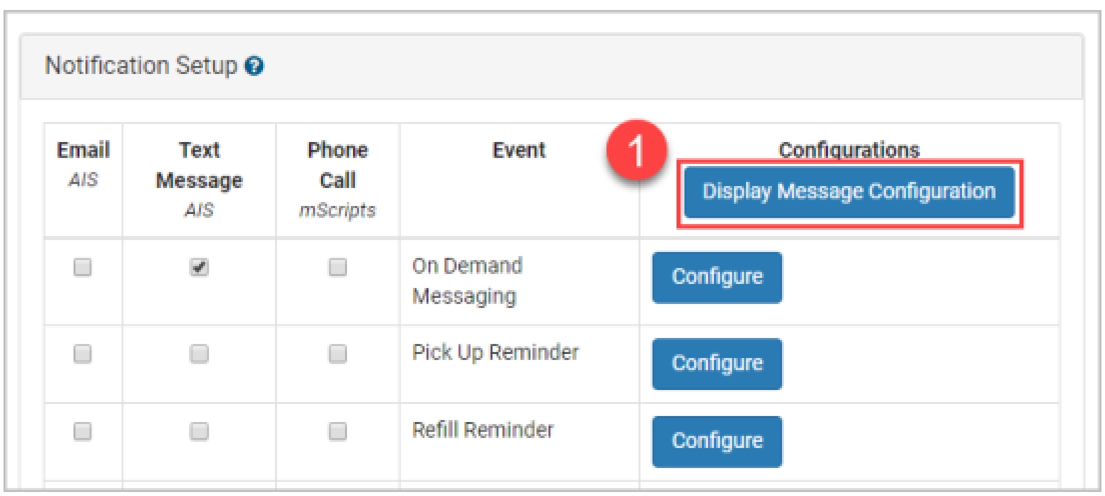
1. To edit a **Display Message**, select the **Display Message Configuration** button in the **Notification Setup** section. The **Display Message Configuration** window displays.



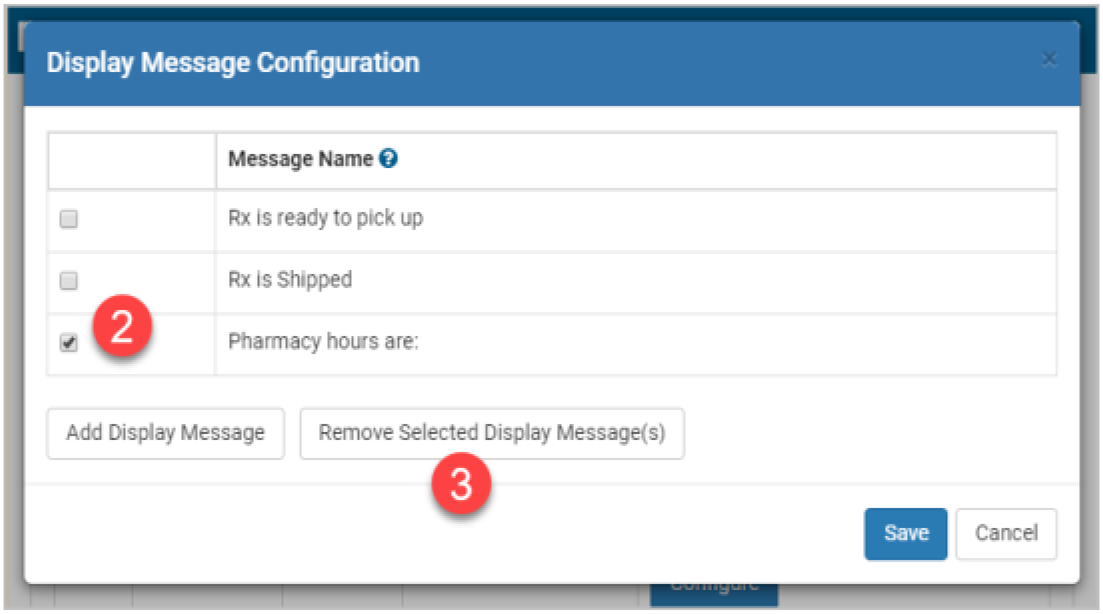
2. Locate the **Display Message** that needs edited within the **Message Name** list. Edit the **Display Message** text in the **Message Name** column.

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.

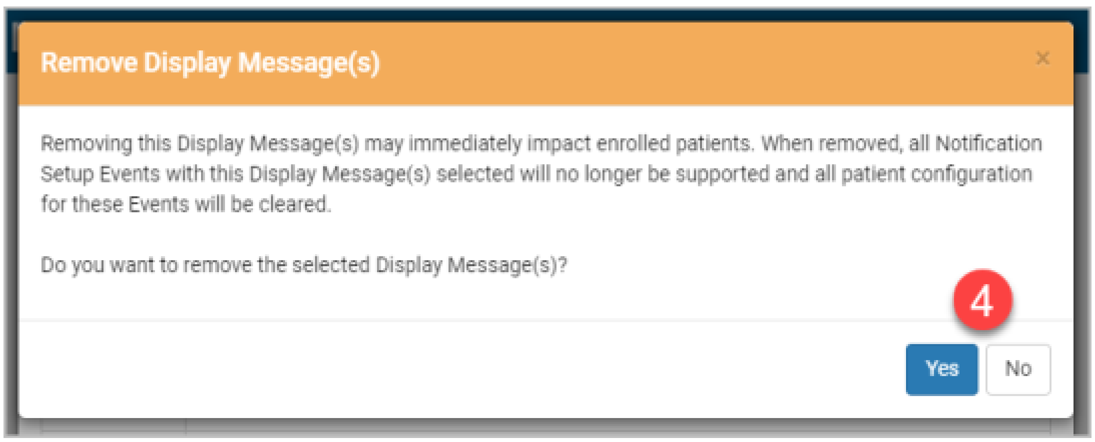
Removing Display Messages



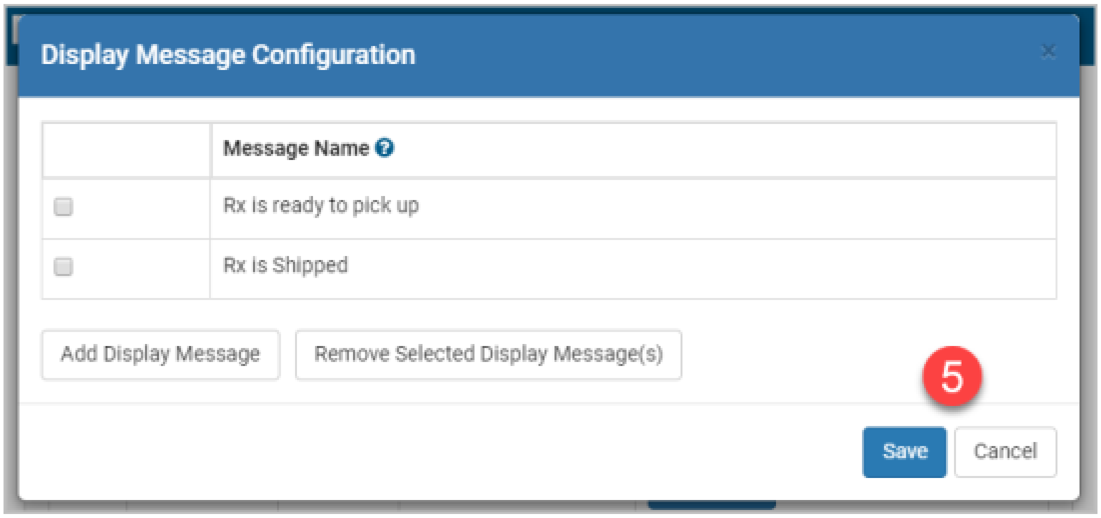
1. To remove a **Display Message**, select the **Display Message Configuration** button in the **Notification Setup** section. The **Display Message Configuration** window displays.



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.

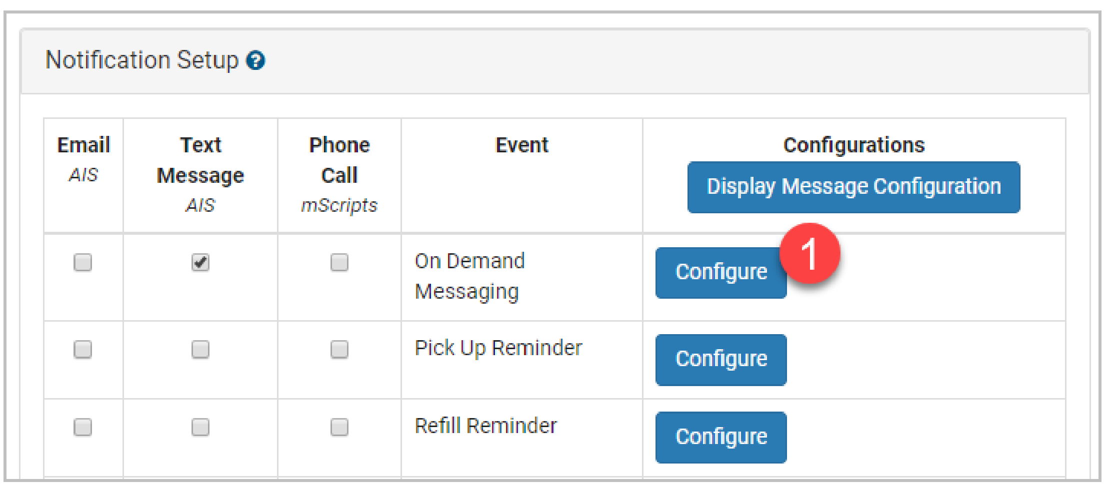
On Demand Messaging, Pick Up Reminder, and Refill Reminder Settings

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.

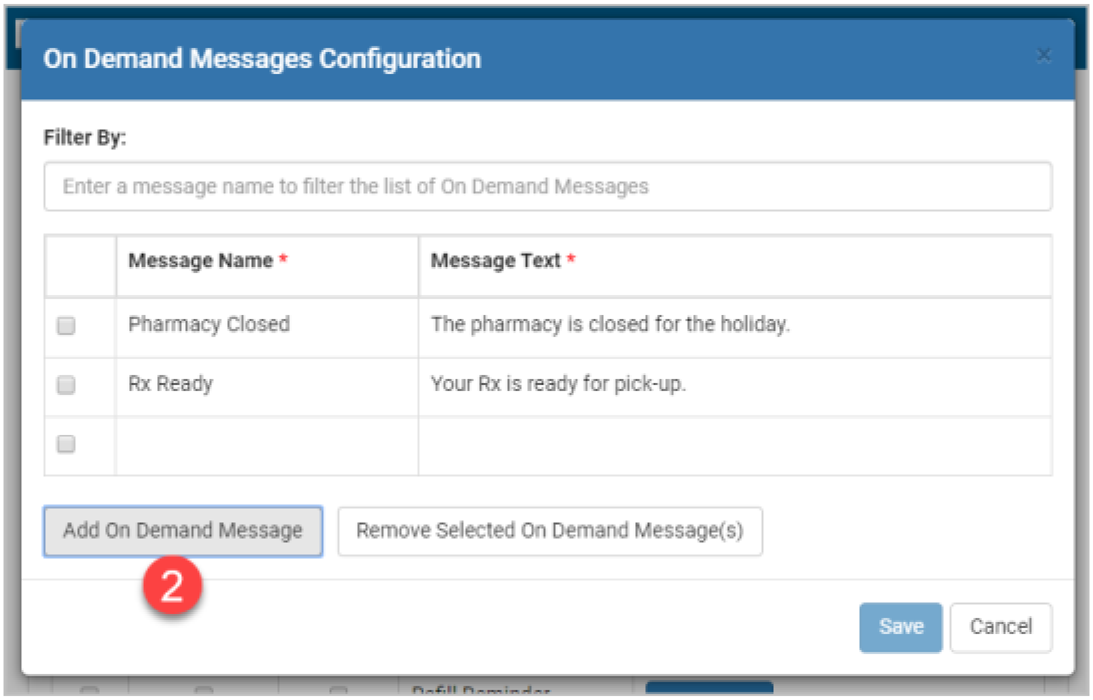
On Demand Messaging

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

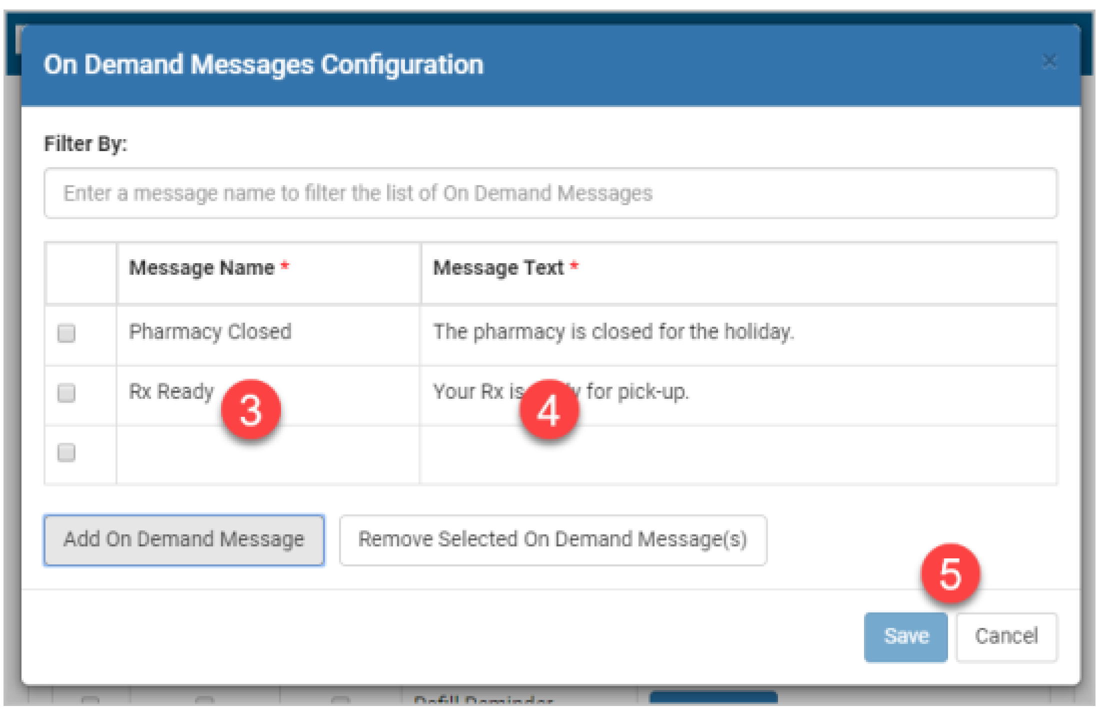
Adding On Demand Messages



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

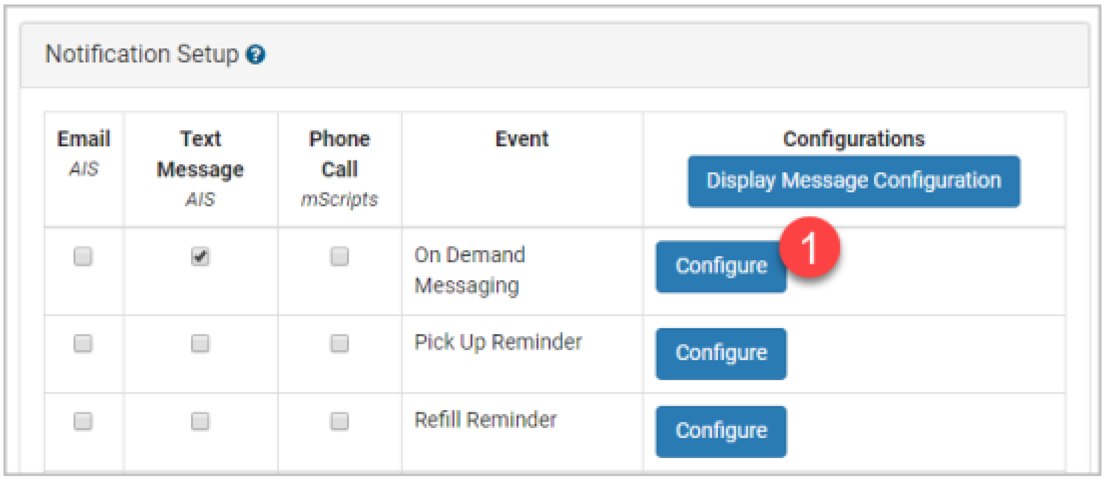


2. Scroll to the bottom of the list, if applicable and select the **Add On Demand Message** button. A new row appears at the bottom of the list.

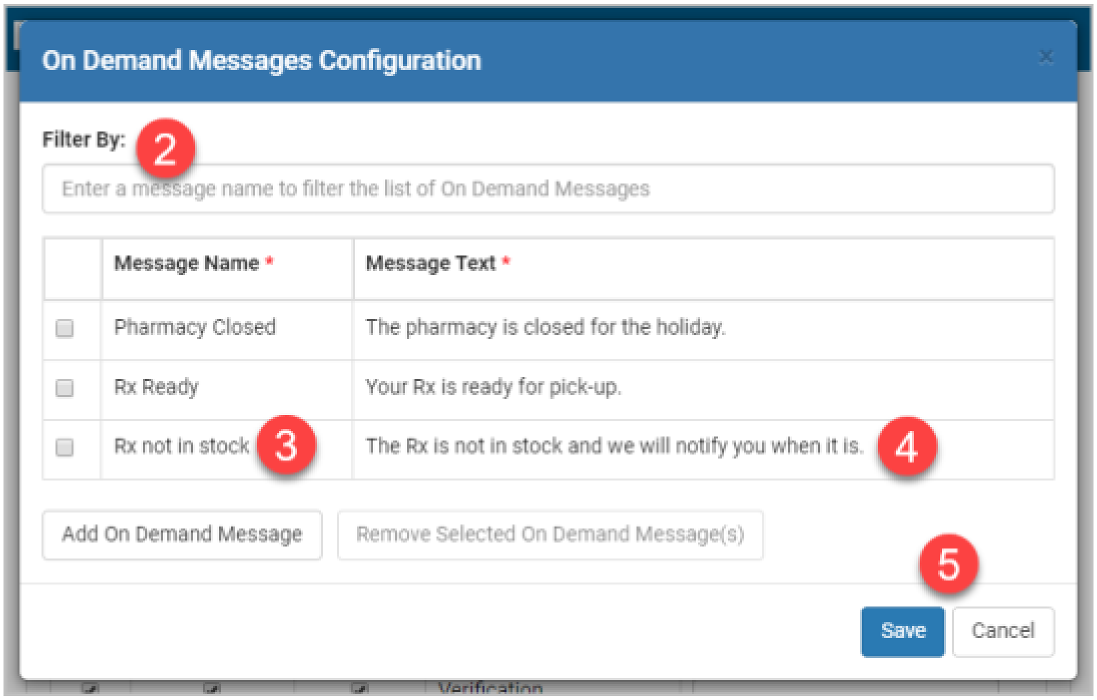


3. Enter the name of the **On Demand Message** in the **Message Name** column. The text entered in this column will display when sending an **On Demand Message** to a patient via the **PCS** tab within the **Clinical App**.
4. Enter the text associated to the **On Demand Message** in the **Message Text**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

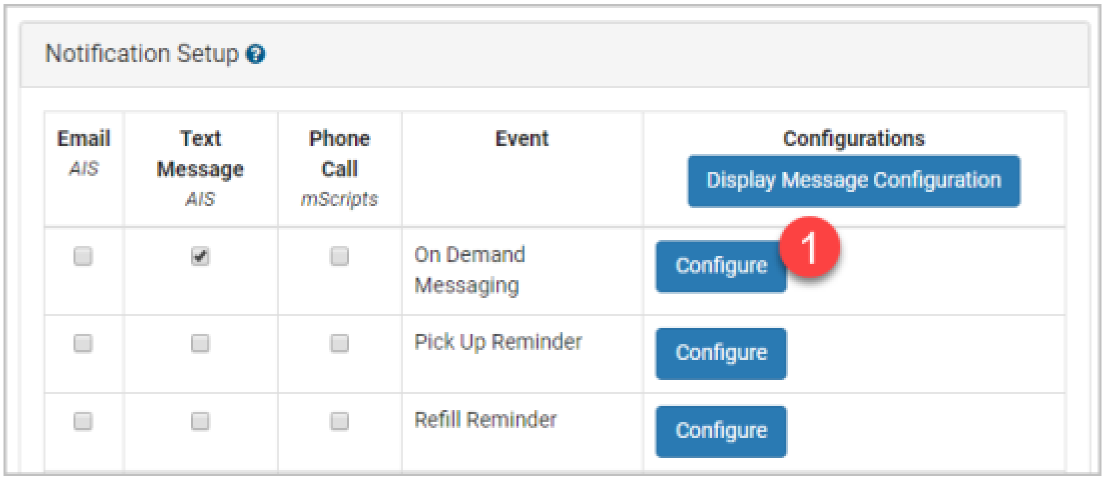


2. Use the **Filter By** field to filter the list of existing **On Demand Messages.** Locate the **On Demand Message** that needs edited within the list.

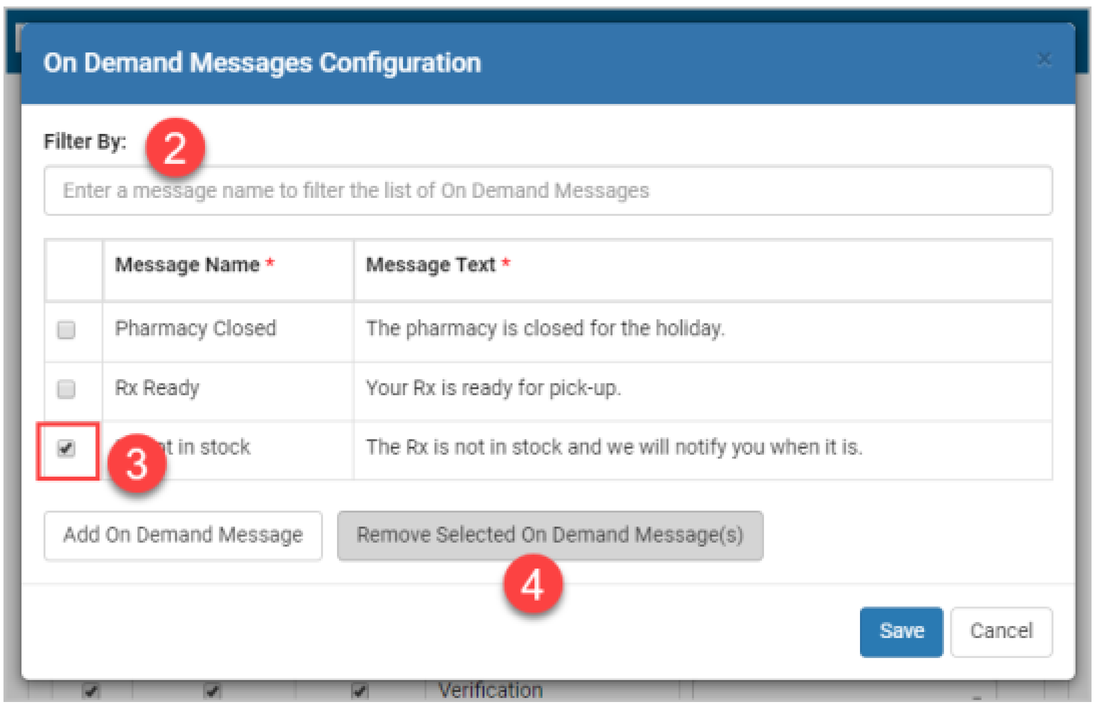
3. Edit the name of the **On Demand Message** in the **Message Name** column, if needed. The text entered in this column will display when sending an **On Demand Message** to a patient via the **PCS** tab within the **Clinical App**.

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.

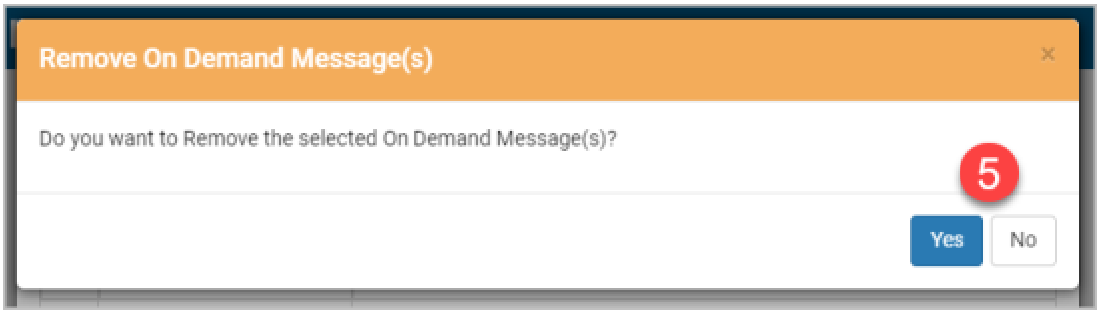
5. Continue to edit **On Demand Messages** by repeating steps 2-4. When all **On Demand Messages** have been edited, select the **Save** button to save your changes, or the **Cancel** button to discard your changes.



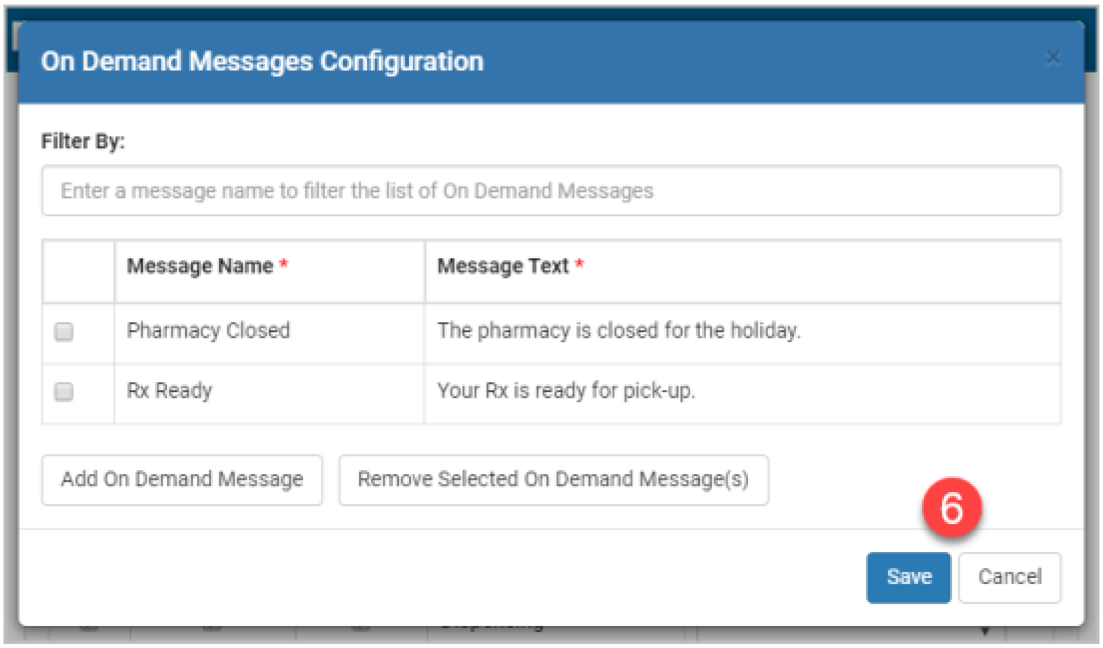
1. To remove an **On Demand Message**, select the **Configure** button in the **Notification Setup** section. The **On Demand Messages Configuration** window displays.



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 SelectedOn Demand Message(s)** button.



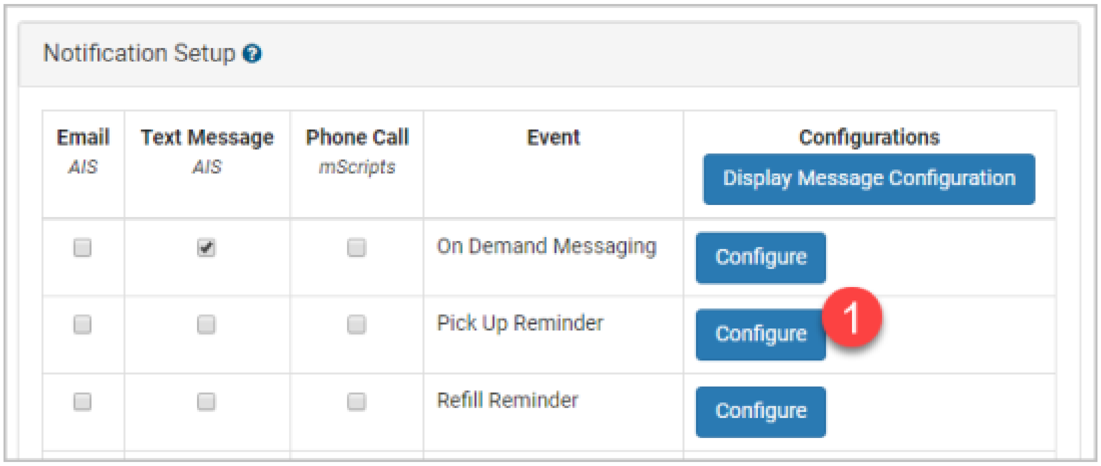
5. Select **Yes** in the **Remove On Demand Message(s)** confirmation window to remove the selected **On Demand Message(s)**, or **No** to cancel the removal.



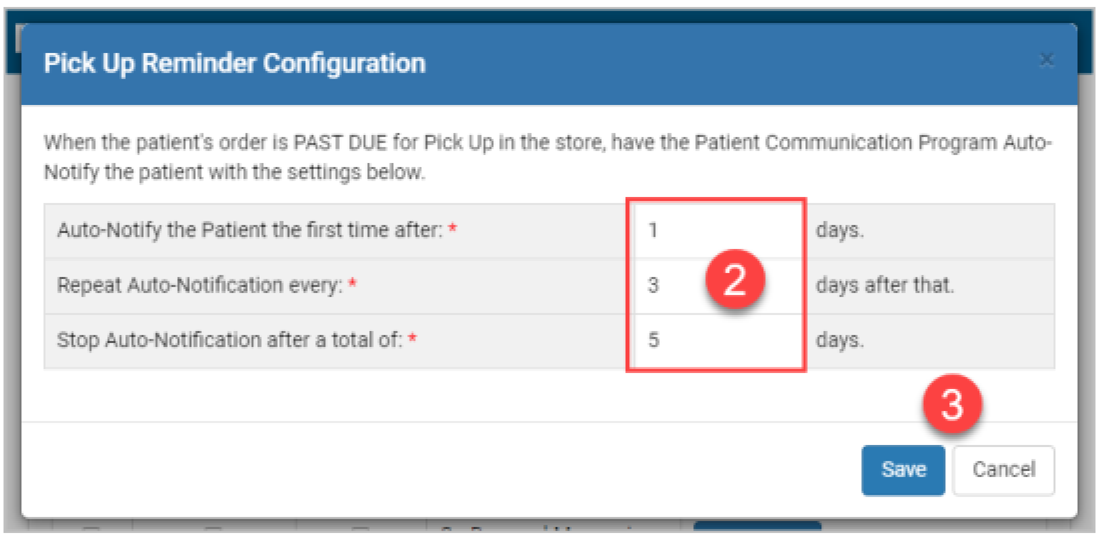
6. Select the **Save** button to save your changes, or the **Cancel** button to discard your changes.

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**.

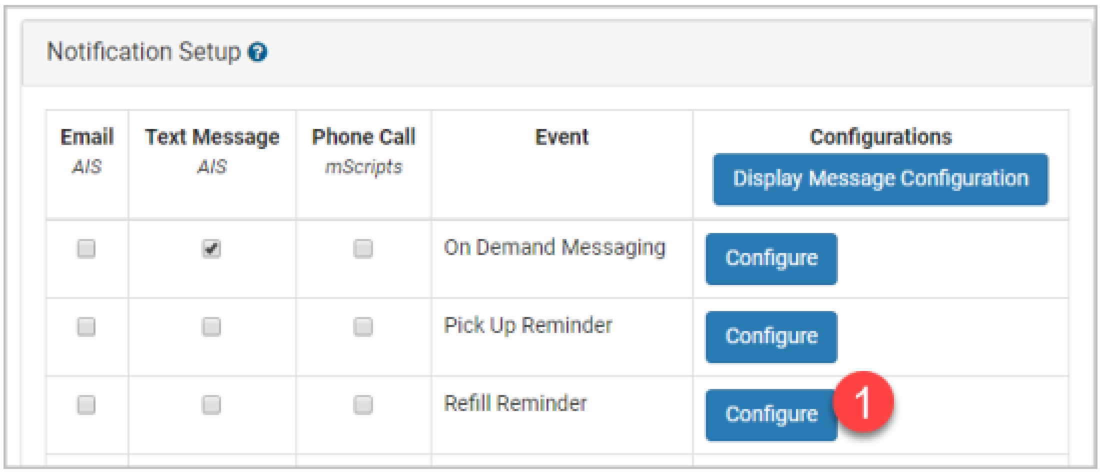
Note:
You must enter values for each of the three settings to support **Pick Up Reminders**. You cannot save your changes unless all three settings have been populated.

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

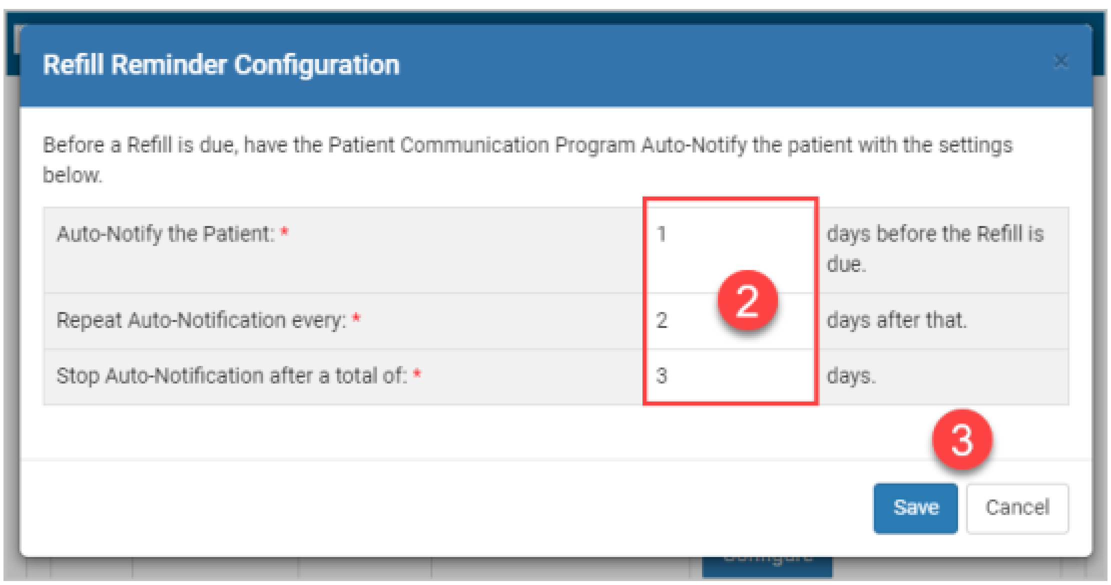
Note:
Pick Up Reminder settings can be edited at any time.

Refill Reminders

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



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



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**.

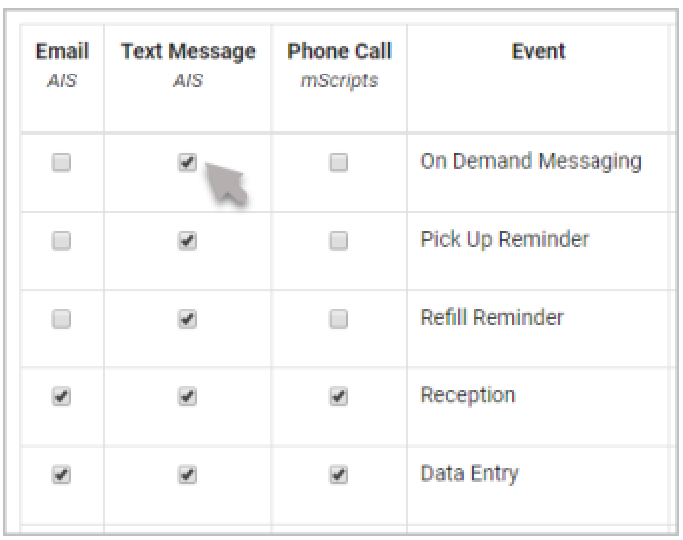
> **Note:**
> You must enter values for each of the three settings to support **Refill Reminders**. You cannot save your changes unless all three settings have been populated.

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
☐	☑	☐	On Demand Messaging
☐	☑	☐	Pick Up Reminder
☐	☑	☐	Refill Reminder
☑	☑	☑	Reception
☑	☑	☑	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" below section below.

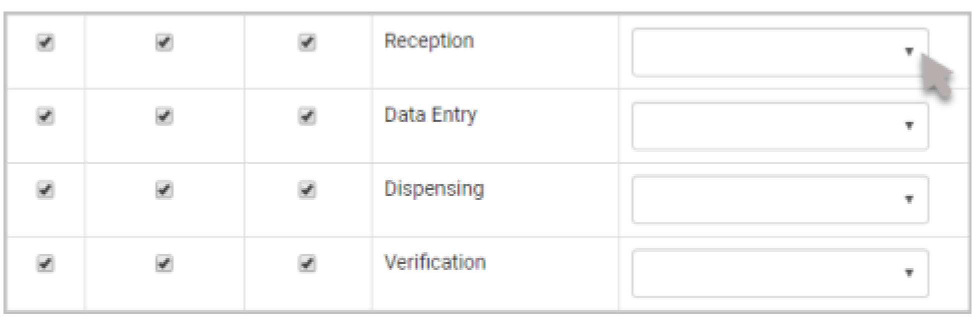
Display Message Selection for Events

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" on the previous page 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**.



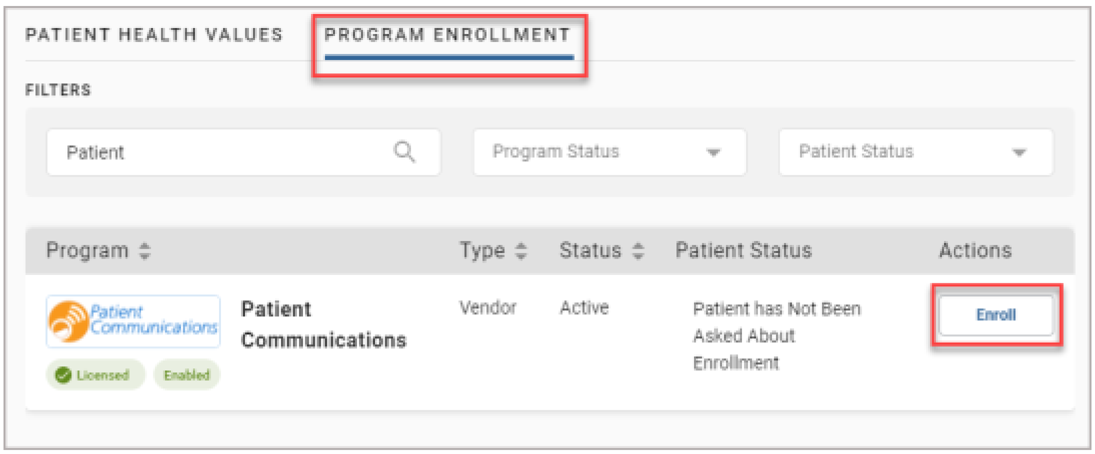
When you are done making all PCS configuration updates, select the **Save** button to save your changes, or the **Cancel** button to discard your changes.

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" on page 200 in "Viewing the CPS Patient Profile" on page 194.
- For more information on new patient automatic enrollment, see the "PCS Automatic Enrollment" on page 248 section.

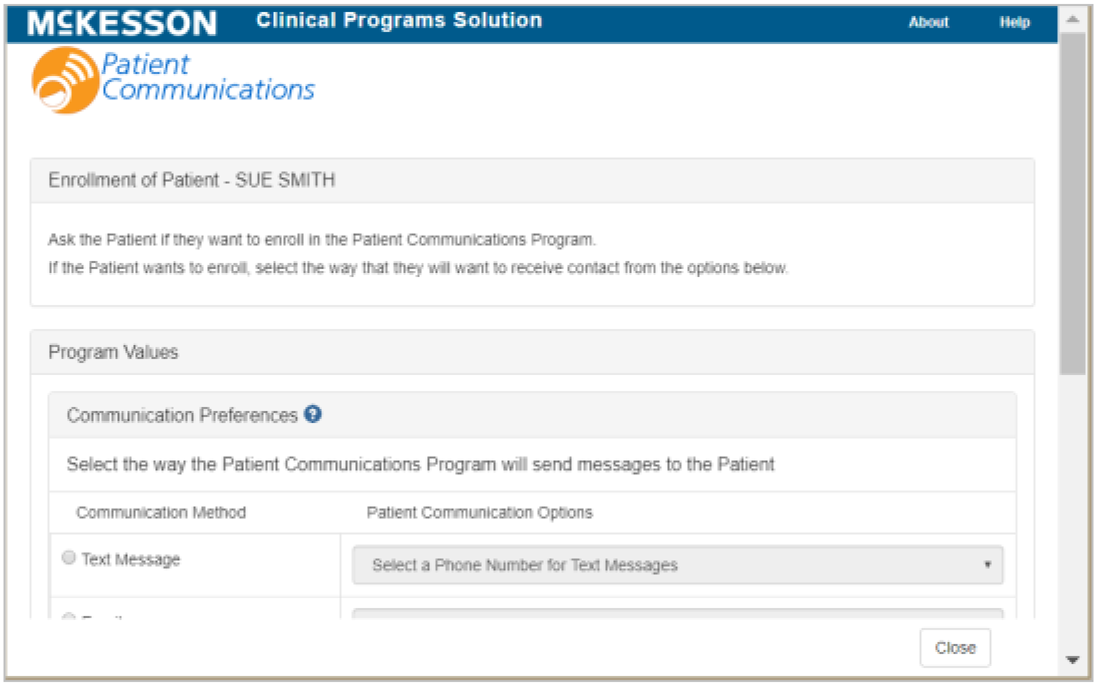


When enrolling a patient in PCS using the CPS Patient Profile, first navigate to the **Program Enrollment** tab and then select the **Enroll** button next to the **Patient Communications Solution** Program to start the enrollment process.

Notes:

- You can also enroll patients in PCS through the **Clinical App** or **Alert 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" on page 138 in "Viewing Alerts in the Clinical App" on page 126.

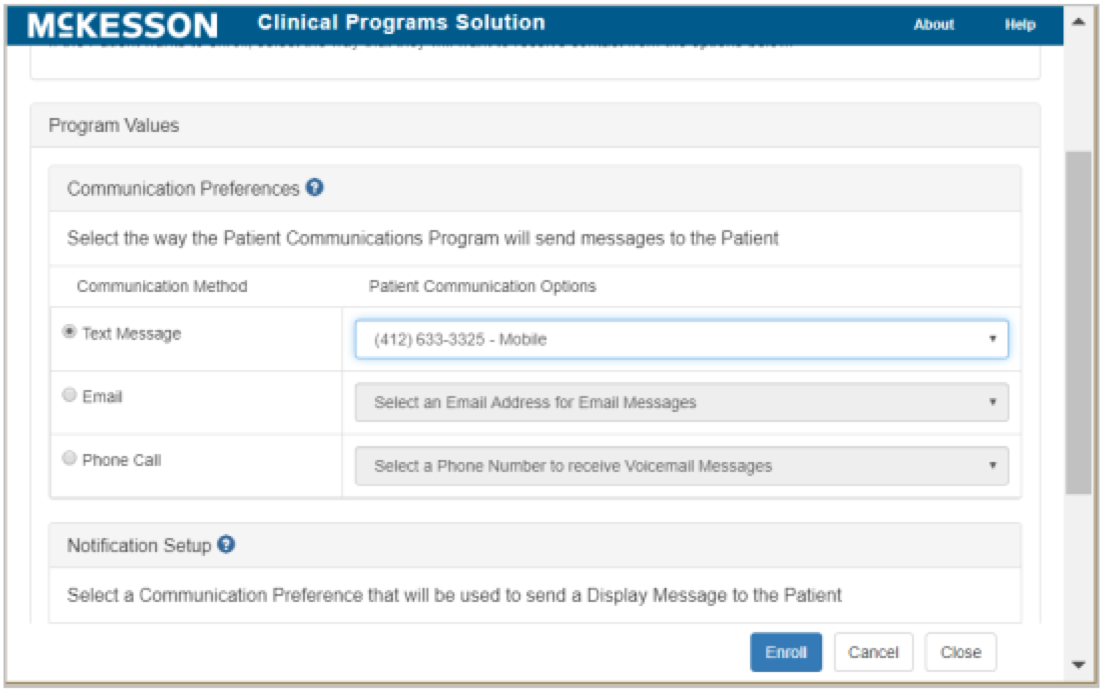
After selecting the **Enroll** button, the **PCS Patient Configuration** window displays.



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.

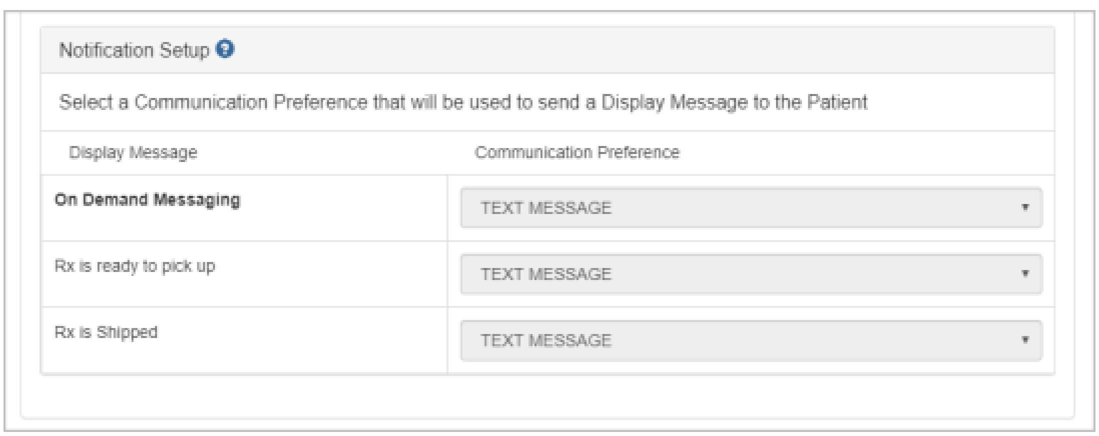
Note:
If **PCS Easy Mode** is enabled, you will only be able to set one **Communication Method** for the patient, as shown below.



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**.



Note:
Only supported **Events** will display in the **Notification Setup** section. To modify what **Events** are supported, see the "Notification Setup" on page 226 section.

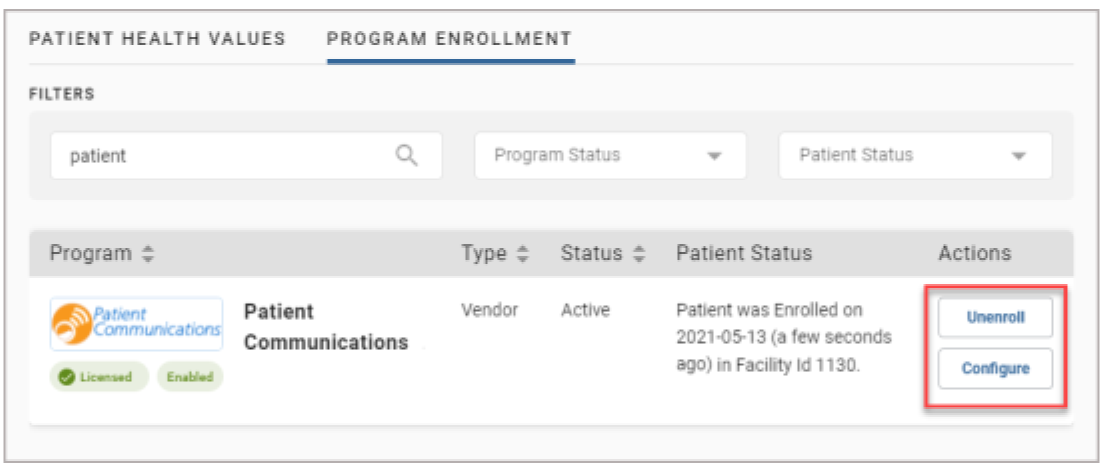
To configure an **Event** for the patient, use the drop-down in the **Communication Preference** column to select the **Communication Method** that the patient prefers for that **Event**.

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 223.

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.



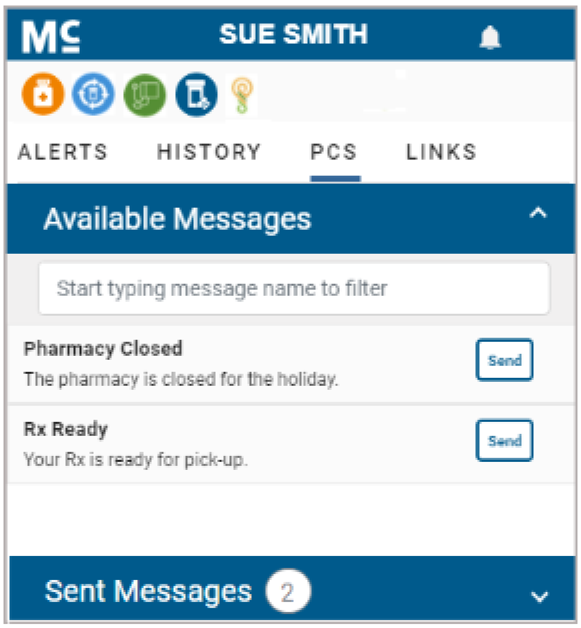
Selecting the **Configure** button allows you to edit the PCS configuration defined for the patient. Selecting the **Unenroll** button will unenroll the patient from the Program.

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

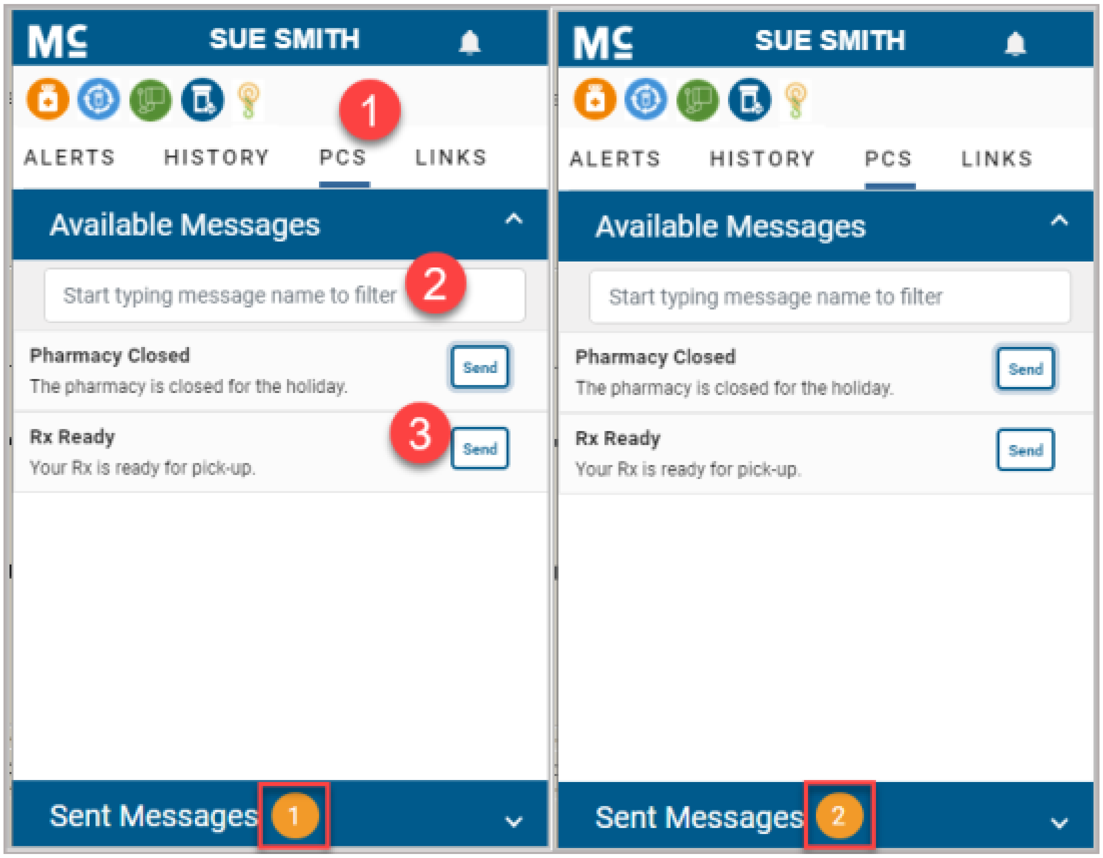
Accessing On Demand Messages in the Clinical App

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.

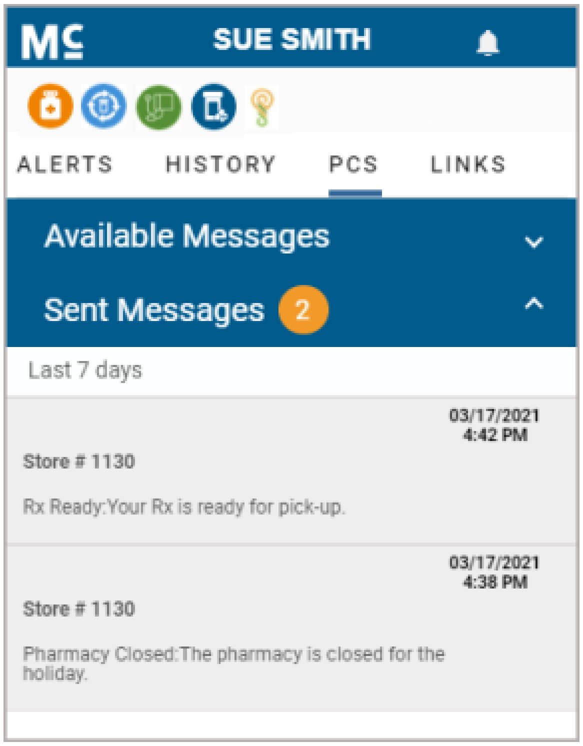


Sending a PCS On Demand Message



1. Open the **Clinical App** and select the **PCS** tab. For more information on the **Clinical App**, see "Viewing Alerts in the Clinical App" on page 126.
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.

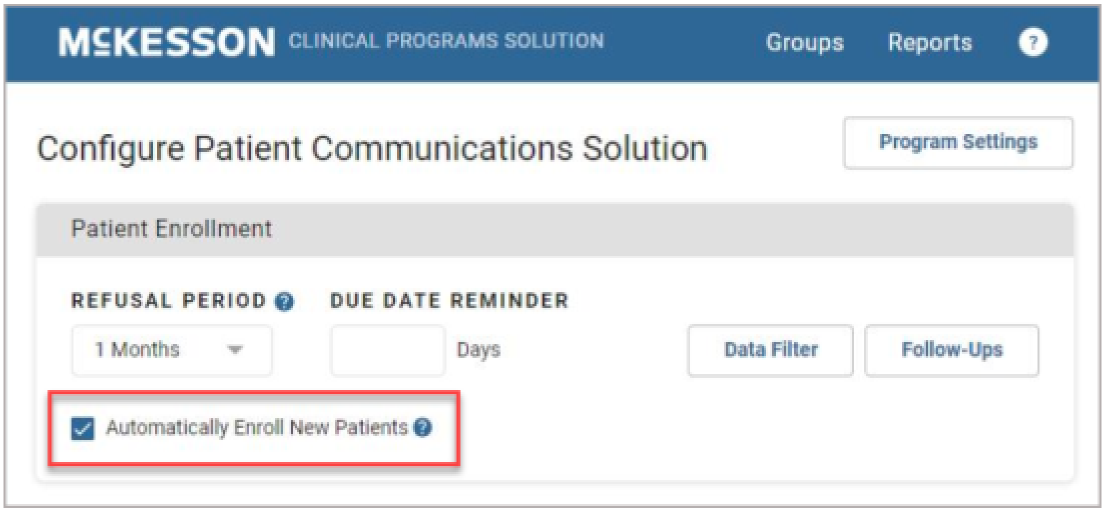


Vendor Program Automatic Enrollment

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.

Chapter 16: 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.

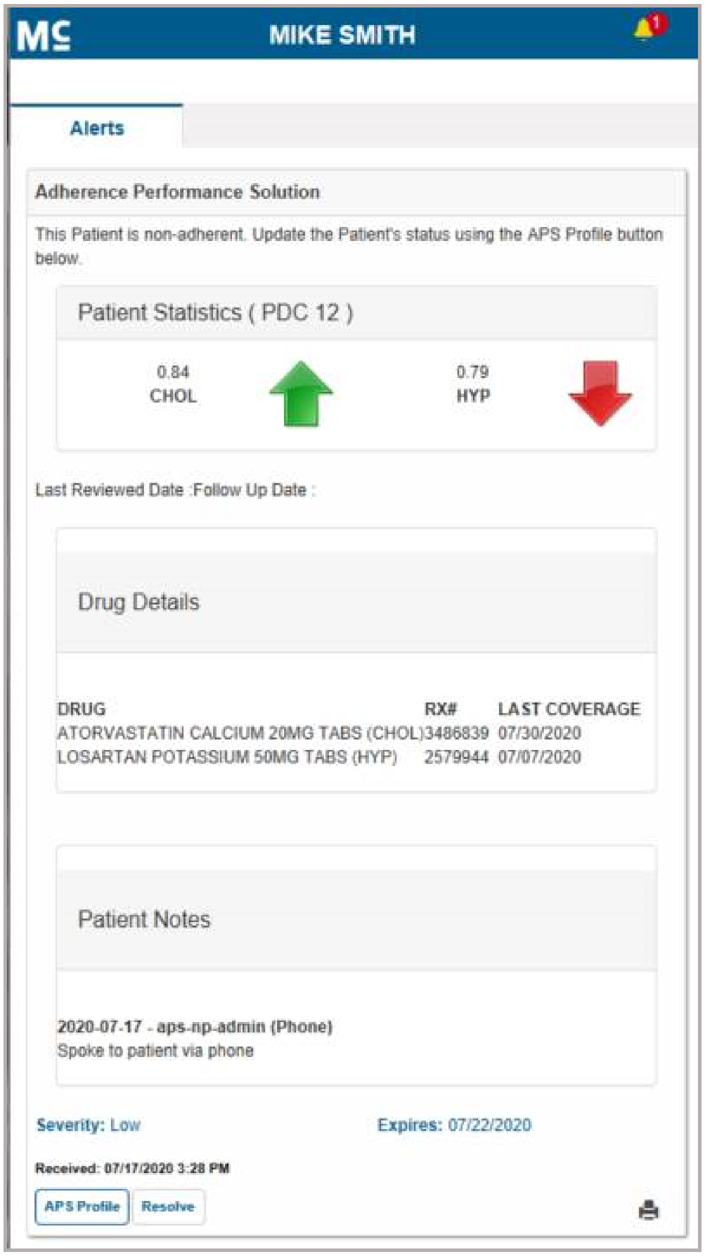
CPS and APS Integration

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.

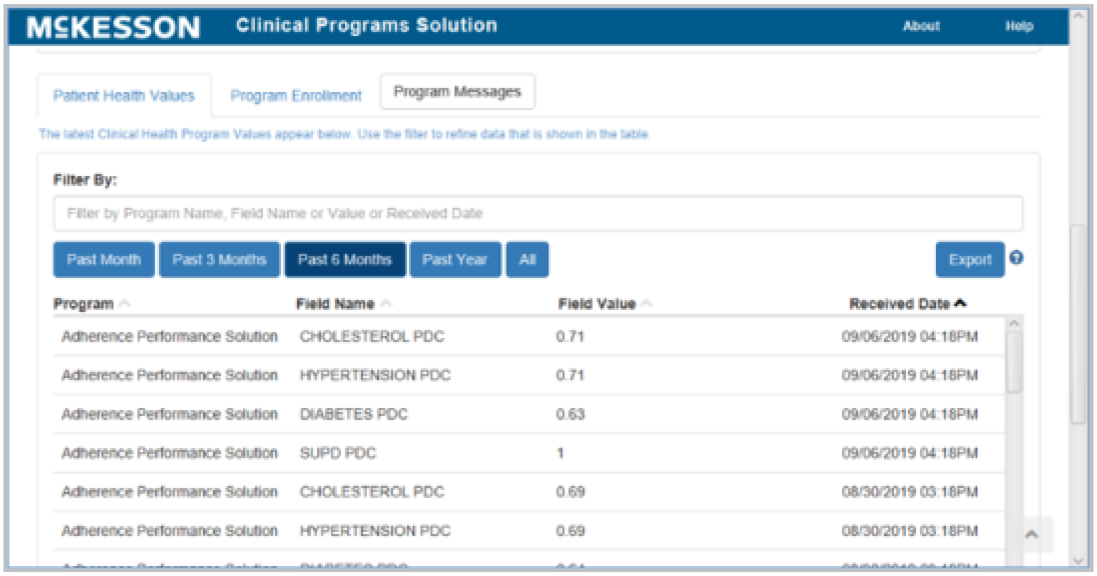
Types of APS Notifications in CPS

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 **Alert Queue** outside of prescription processing.



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**.



Configuring APS Notifications in CPS

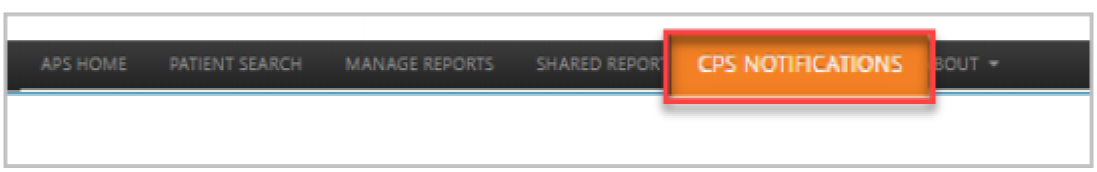
The **CPS NOTIFICATIONS** menu option in APS allows you to modify the configuration of APS related notifications that are sent to CPS.

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**.

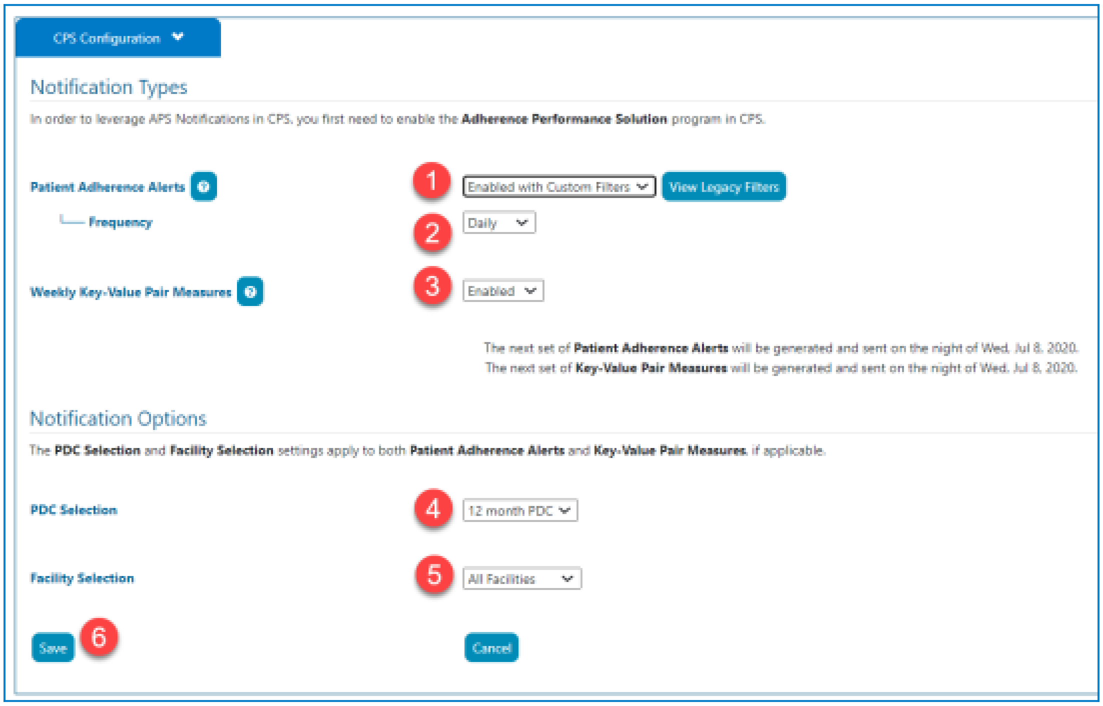
CPS Configuration

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.

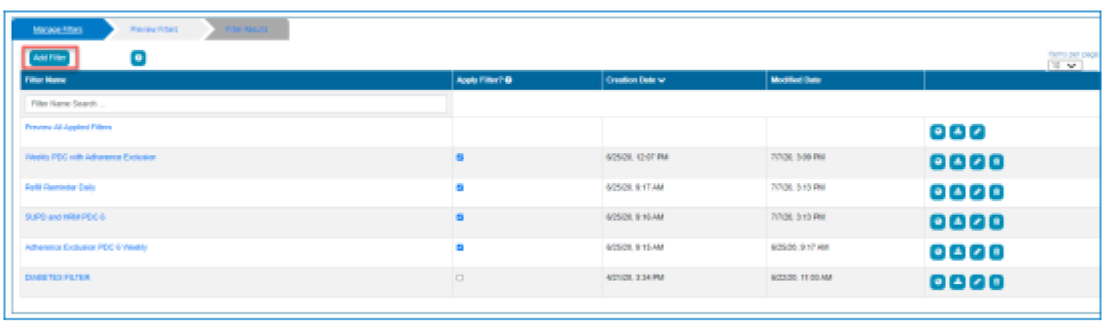
Custom Filters

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.

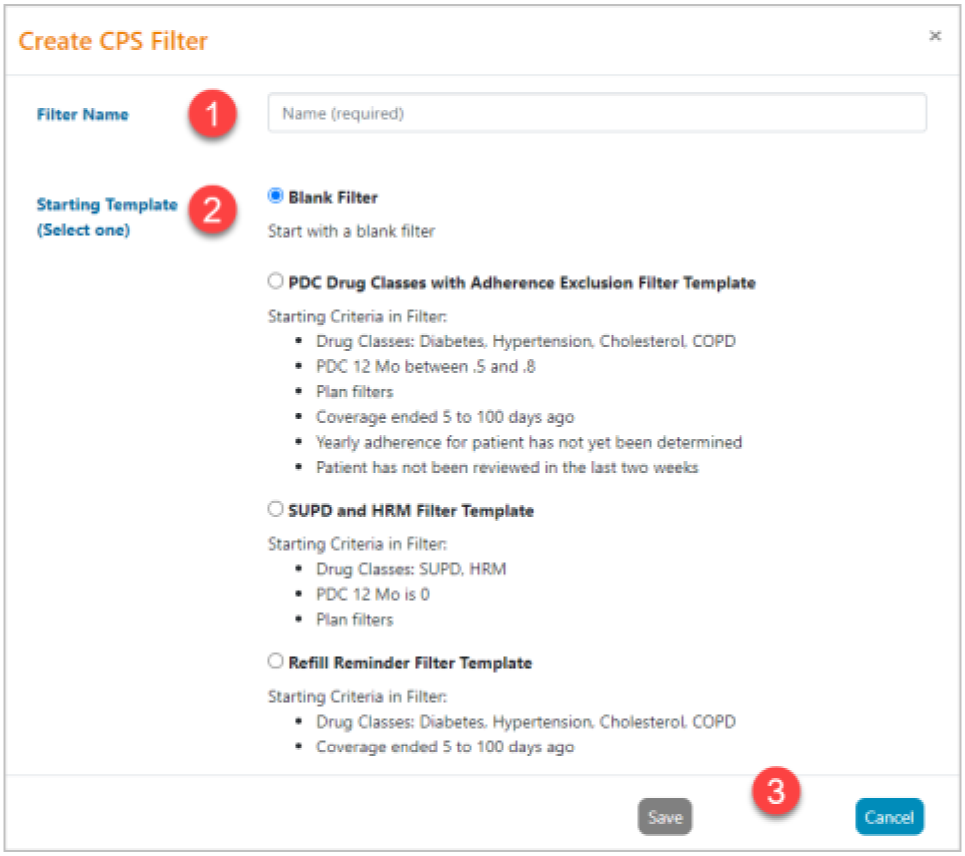
Adding Custom Filters

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.



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**.

4. 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:

- "Available/Selected Columns" on the next page
- "Add, Edit and Delete Filter Conditions" on page 258

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:

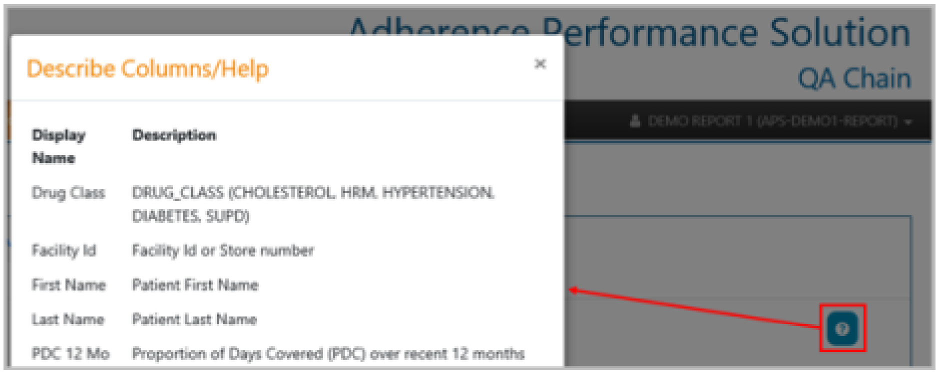
1. Use the double left arrow ( ) to move all columns from the **Selected Columns** section to the **Available Columns** section. Desired columns can then be moved back to the **Selected Columns** section by highlighting the desired column and selecting the right arrow ( ). Use of the **Ctrl** key allows 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.

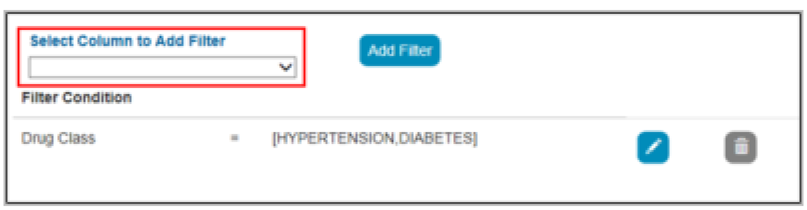
For a description of each column, select the **Describe Columns/Help** button.



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:

- "Number Data Type" on the next page
- "String Data Type" on page 260

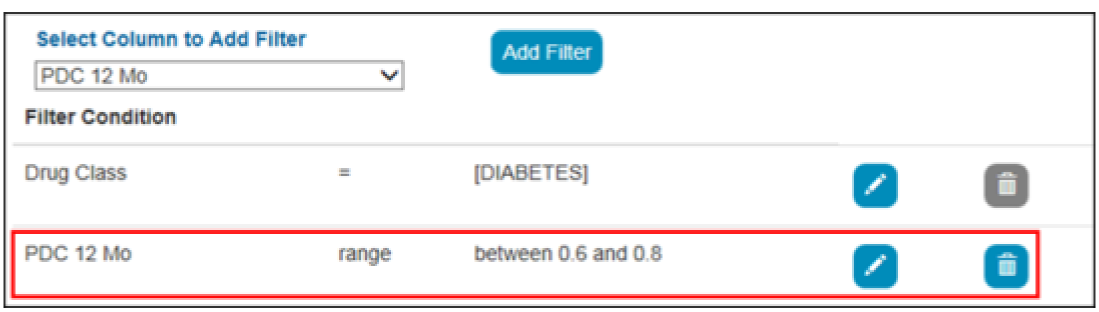
- "Date Data Type" on page 261
- "Drug Class Data Type" on page 262

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.

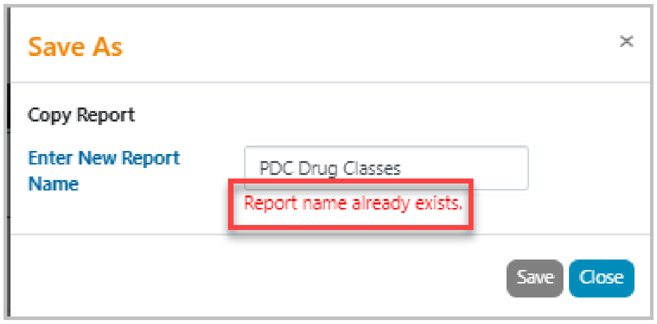
Once the criteria have been added, select the **Save** button to add the **Filter Condition**.



You have the option to edit any existing **Filter Conditions**, or, with the exception of the **Drug ClassFilter 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.

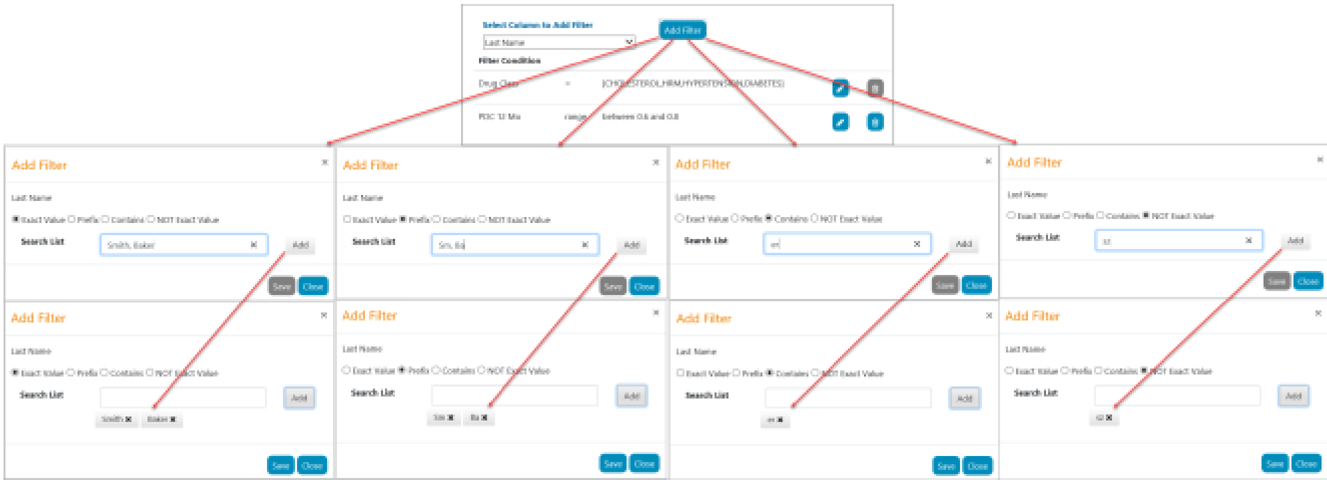


String Data Type

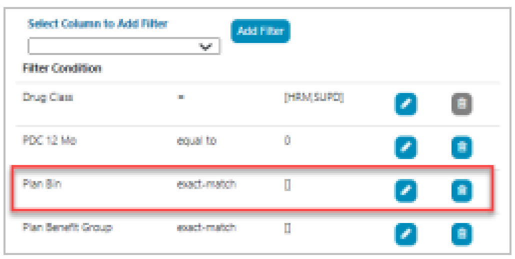
When a column is selected that is based on a character string, you can select to filter based on:

- **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.**



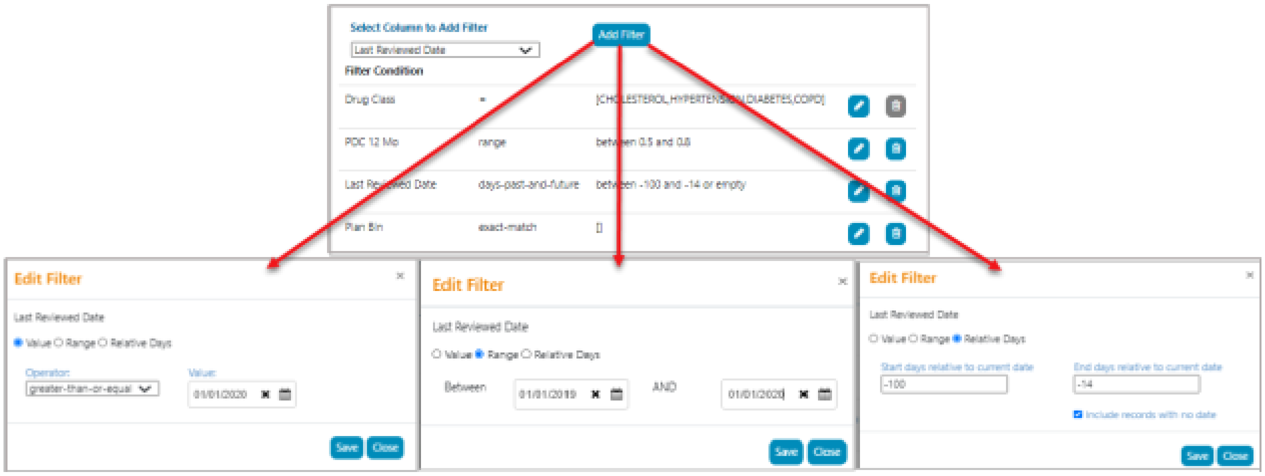
The **Save As** and **Done** buttons will require you to enter a new **Custom Filter** name and save, or return you to the previous window, respectively, as described in "Number Data Type" on page 259 above.

Date Data Type

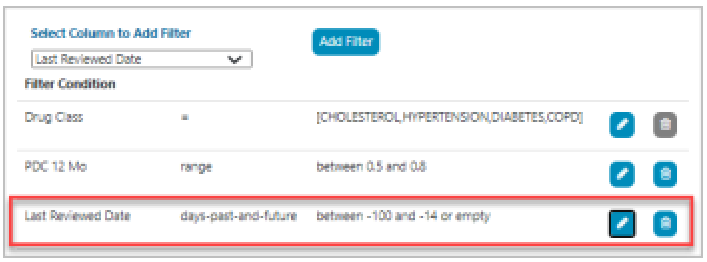
When a column is selected that is based on a date, you can select to filter based on:

- **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.



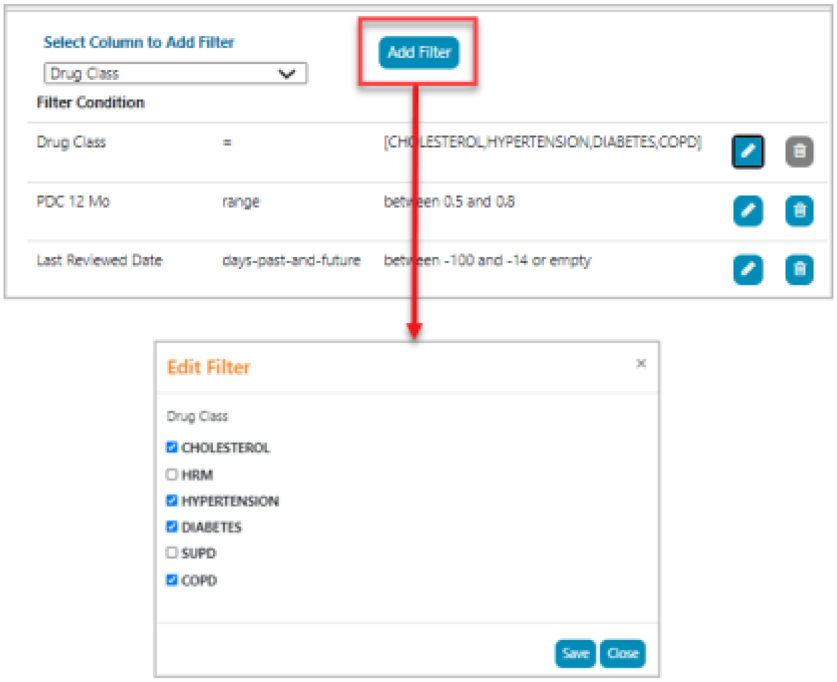
Once the criteria have been added, select the **Save** button to add the **Filter Condition.**



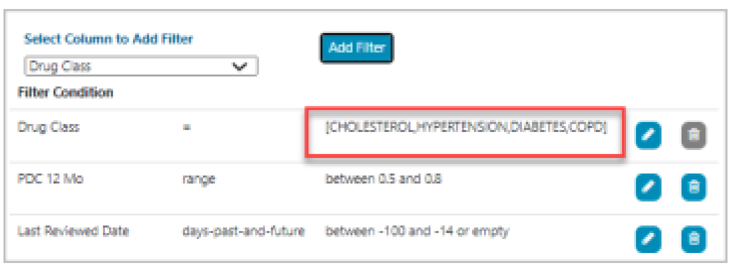
The **Save As** and **Done** buttons will require you to enter a new **Custom Filter** name and save, or return you to the previous window, respectively, as described in "Number Data Type" on page 259 above.

Drug Class Data Type

The **Drug ClassData 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.

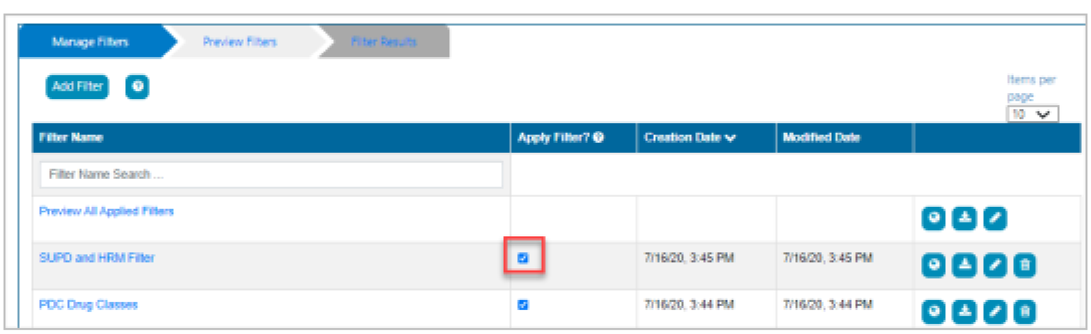


Once you have selected the appropriate drug class(es), select the **Save** button to add the **Filter Condition**.



Applying Custom Filters

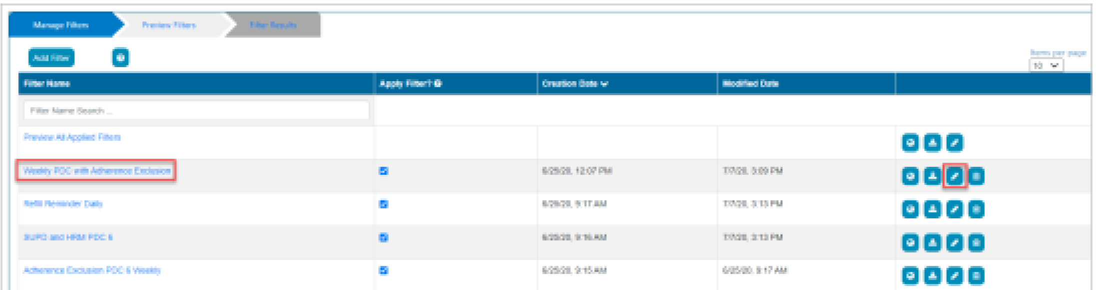
For a **Custom Filter** to be used when determining what **Patient Adherence Alerts** are generated, the **Apply Filter?** checkbox must be selected for the **Custom Filter**.



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.



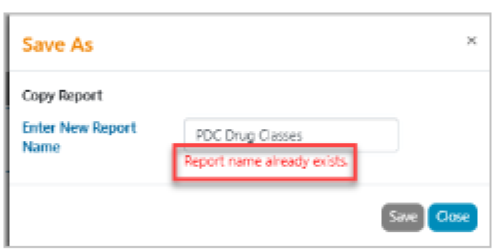
The process to edit **Custom Filters** utilizes the same steps as described in:

- "Available/Selected Columns" on page 257
- "Add, Edit and Delete Filter Conditions" on page 258

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.

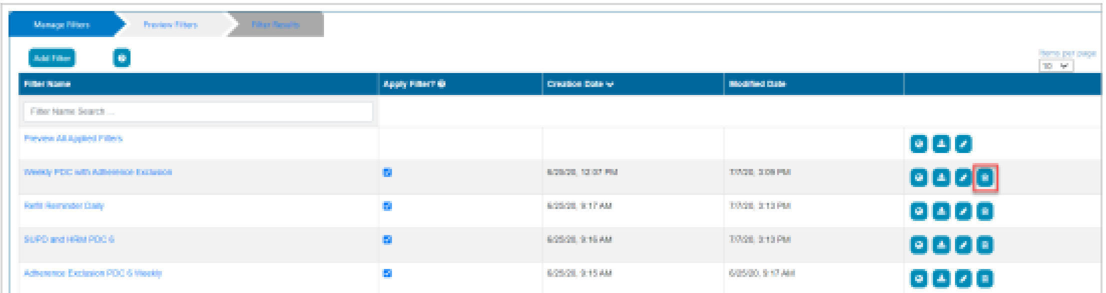
Selecting the **Save As** button will open a pop-up box, allowing you to enter a new **Custom Filter** name. Select the **Save** button once a new name is entered.



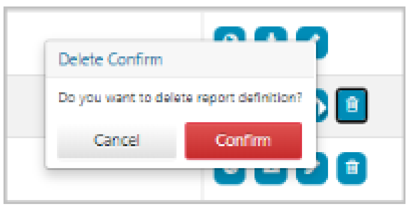
Note:
The **Custom Filter** name entered cannot match an existing **Custom Filter** name.

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.



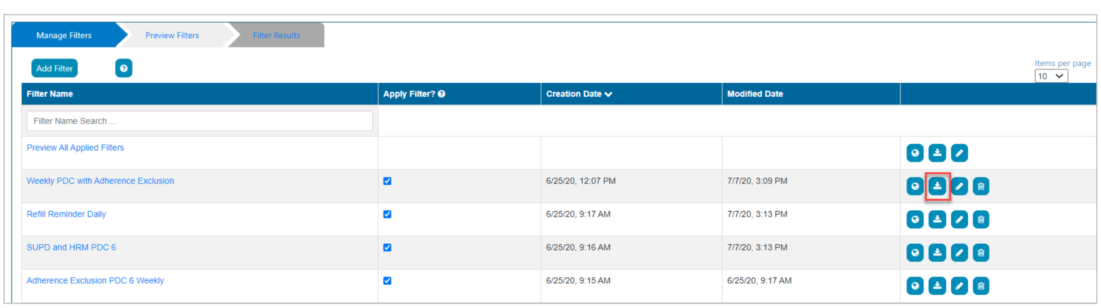
Select the **Confirm** button to delete the **Custom Filter**.

Viewing Custom Filter Results

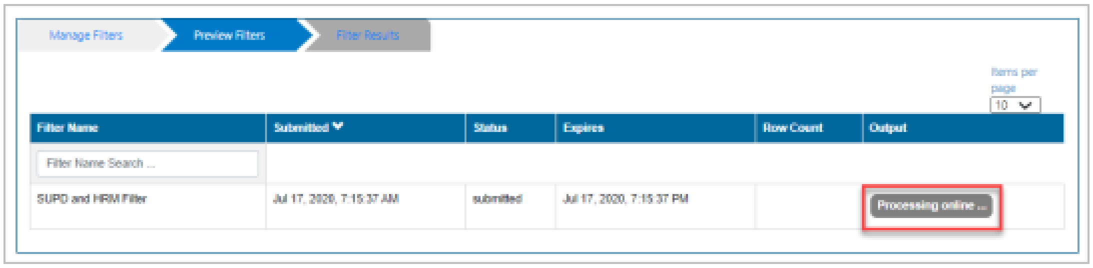
To ensure the accuracy of a **Custom Filter**, it is recommended that you review the list of patients that match the **Filter Conditions** by using either the "Viewing Results Online" below or "Downloading Results to an Excel Spreadsheet" on the next page options. You can also review the list of patients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

Viewing Results Online

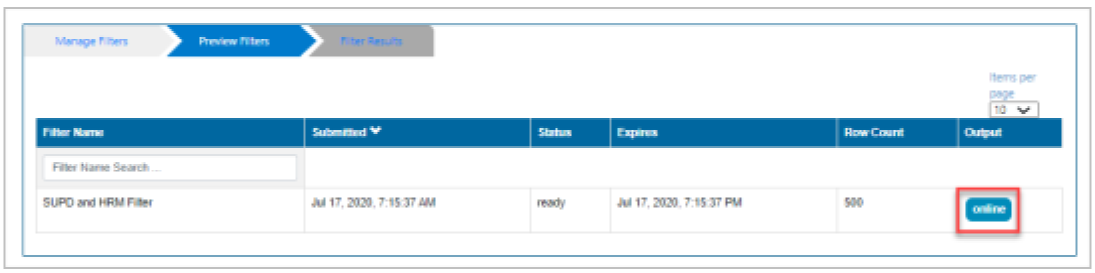
Custom Filter results can be viewed online by selecting the **View Online** button on the **Manage Filters** tab.



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.

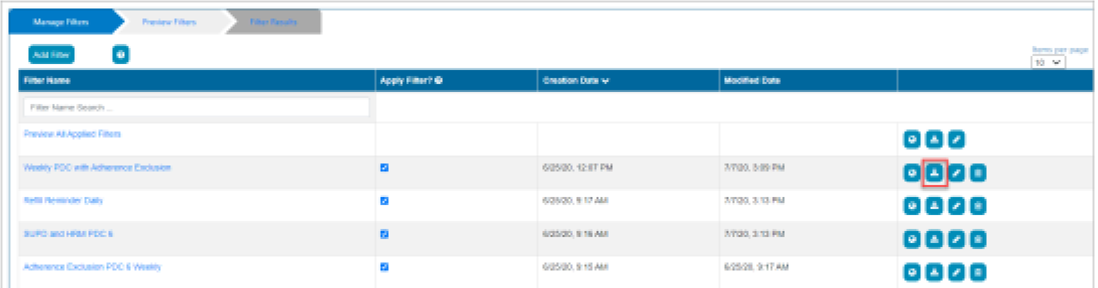


The results will be displayed in table format under **Filter Results**. You can configure the number of rows that will be displayed per page using the **Items per page** drop-down. The **Next >>** and **<< Previous** buttons allow you to navigate pages.

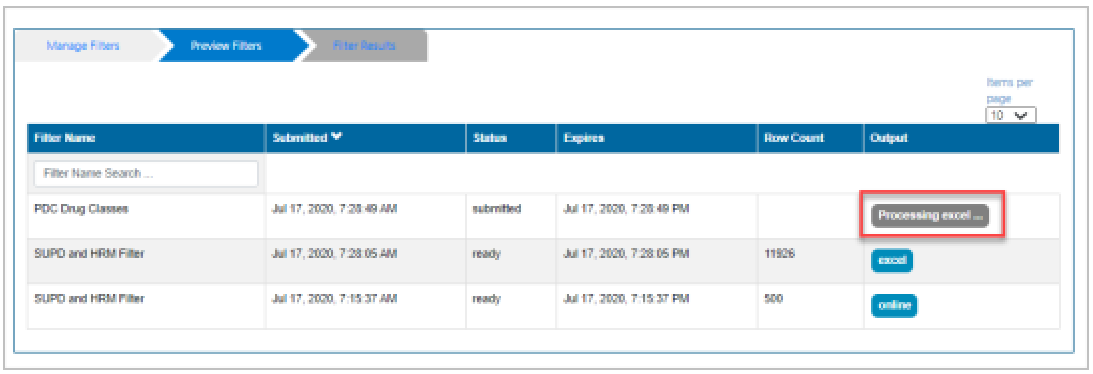
Note:
The maximum number of rows that can be displayed online is 500. Additional **Filter Conditions** should be utilized in order to reduce the number of rows below 500. To view more than 500 rows, the report must be downloaded to Excel®, as described in "Downloading Results to an Excel Spreadsheet" below.

Downloading Results to an Excel Spreadsheet

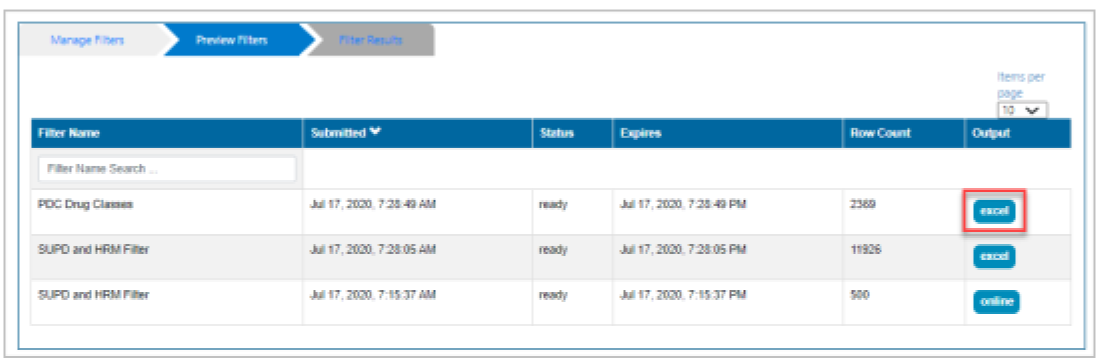
Custom Filter results can also be exported to an Excel® spreadsheet by selecting the **Download Excel** button.



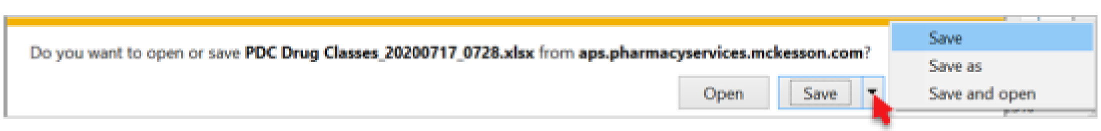
Once the **Download Excel** button is selected the system will process the request. This may take several seconds, depending on the **Filter Conditions** that are applied. On the **Preview Filters** tab all the reports are displayed in descending order of **Submitted Date**, meaning the most recently 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.



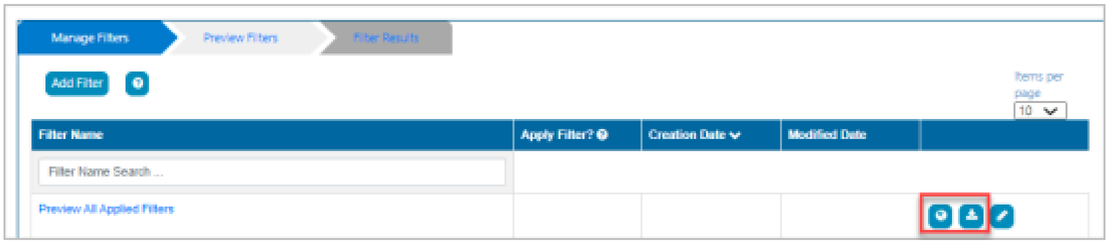
When the **excel** button is selected, a pop-up box will appear prompting you to select what they want to do with the file. Follow the steps on your computer to download the file.



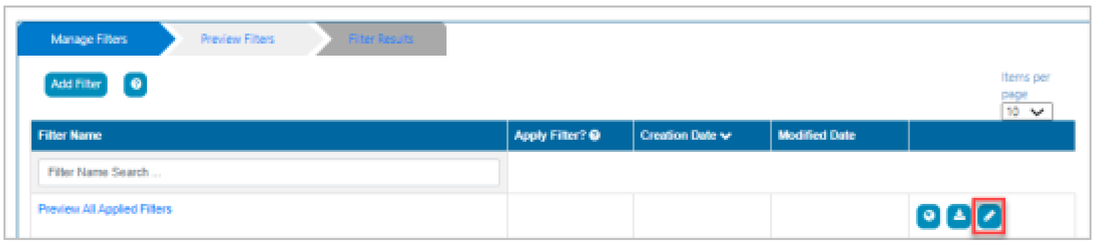
The download produces an Excel® spreadsheet that can be manipulated utilizing built in Excel® functionality.

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.



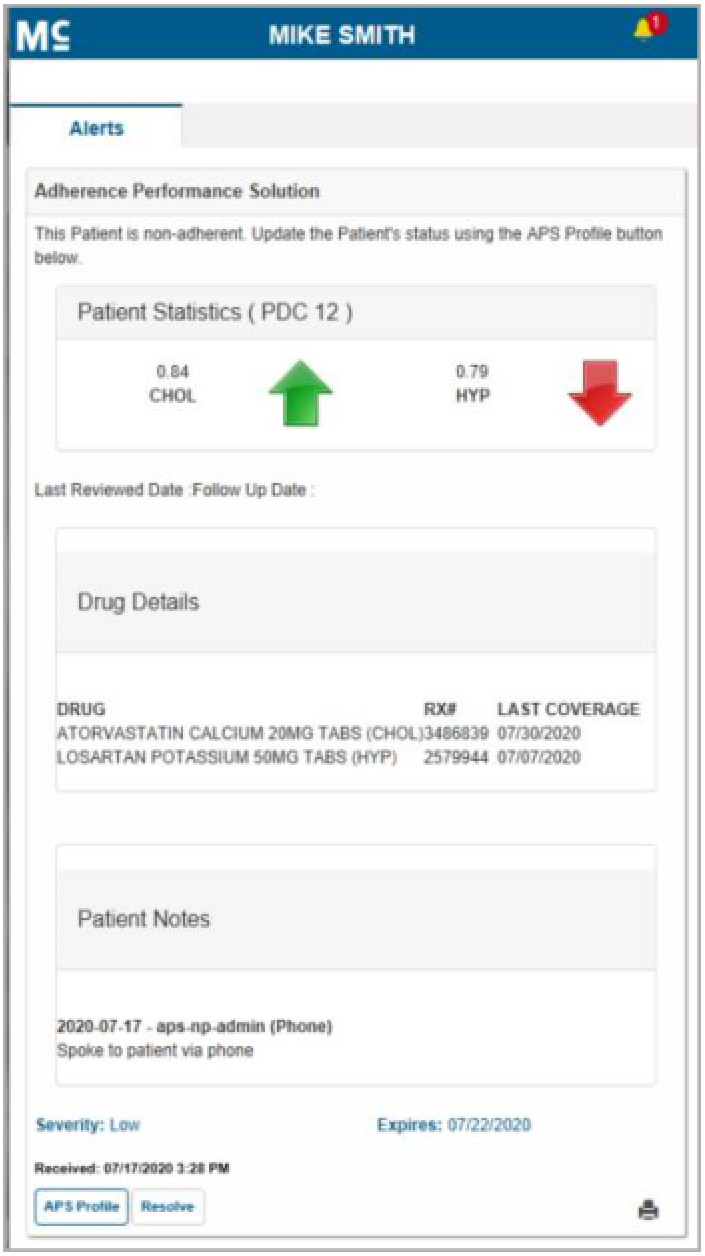
You can use the **View Online** and **Download Excel** buttons to view results for all applied **Custom Filters**. For more information, refer to "Viewing Results Online" on page 265 or "Downloading Results to an Excel Spreadsheet" on page 266.



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.



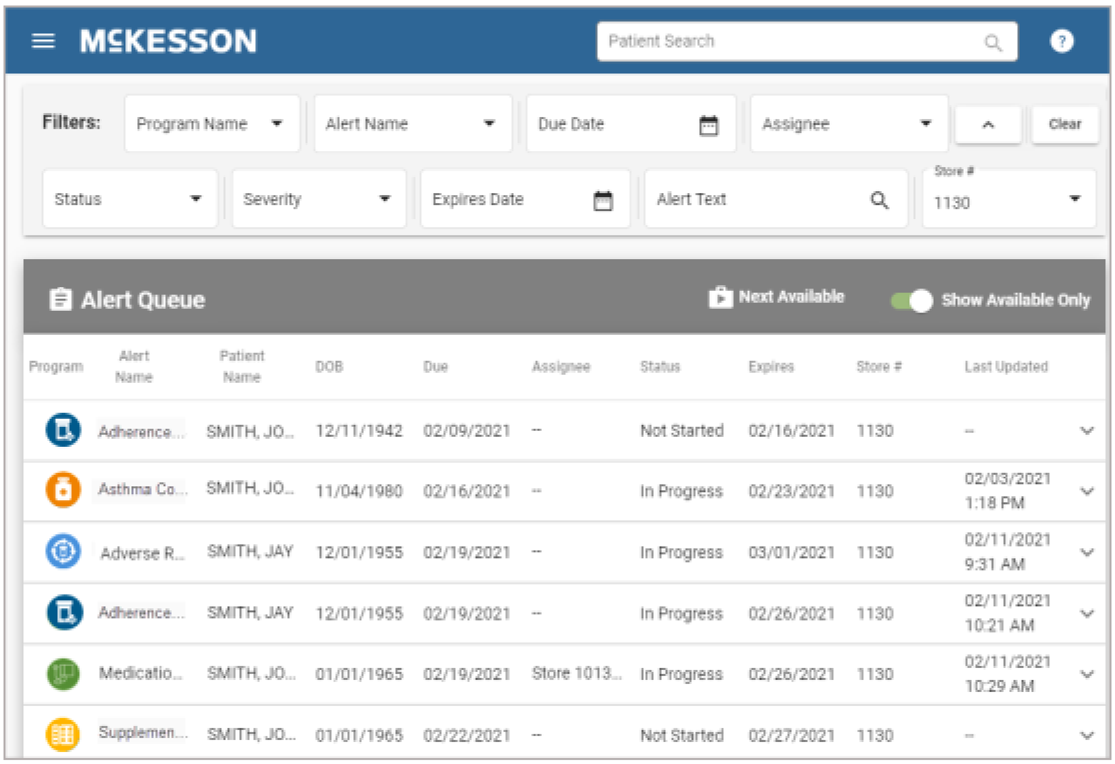
The following information is included in **Patient Adherence Alerts**:

- 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" below.

Viewing Patient Adherence Alerts in the CPS Alert Queue

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

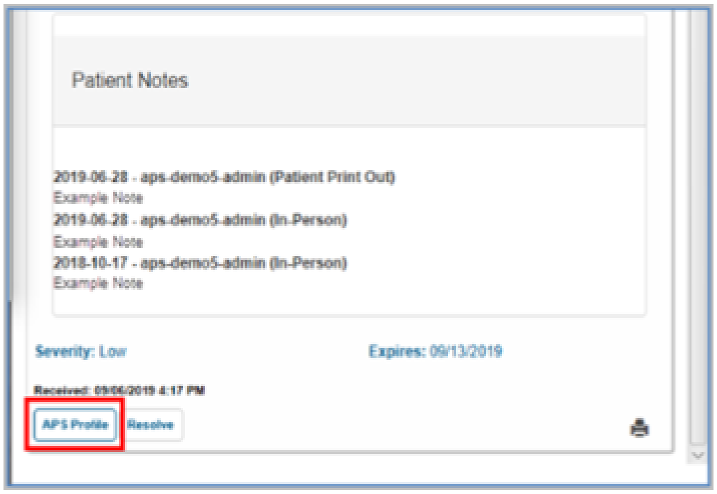


To view additional information for a particular **Patient Adherence Alert**, select the row within the CPS **Alert Queue**.

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 **Alert 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.

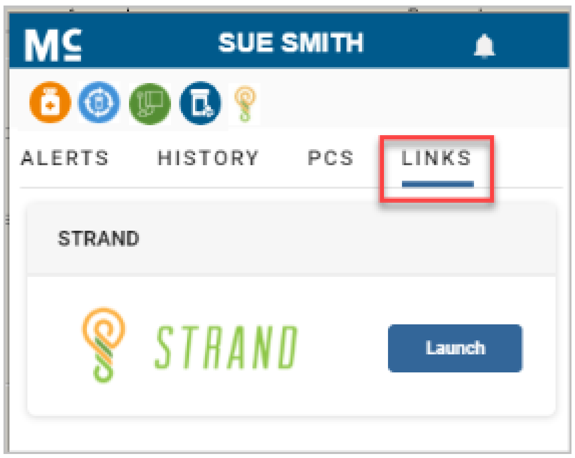
After launching APS via a **Patient Adherence Alert**, you will only have access to the patient in context's profile in APS. To navigate to other APS windows, select the **LOGIN TO APS DASHBOARD** link to open the APS login page.

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

Chapter 17: CPS and STRAND Integration

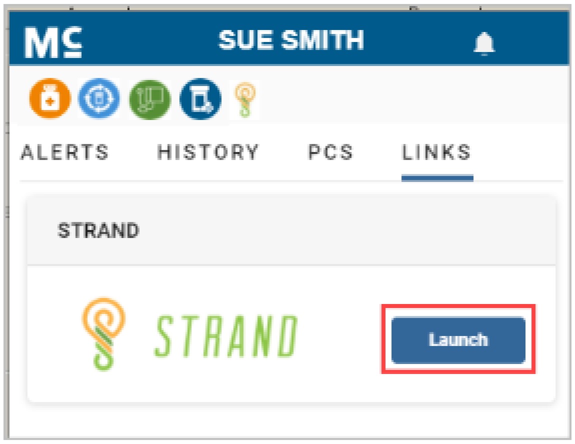
STRAND Single Sign On

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.

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.

Appendix

Questionnaire & Note Components

Type	Component	Description
Basic	Text Field	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: **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. • **Tooltip**—A tooltip that will appear on the right side of the **Label** on the questionnaire. • **Hide Label**—A checkbox to hide the label of this component. This allows you to hide the label in the form builder, but not when it's rendered. • **Disabled**—A checkbox to allow the **Text Field** to be disabled. **Data Tab:** • **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 checkbox to allow the **Text Field** value to be saved to the patient profile. **!** Not available in the Note Builder for a note. • **Save to Note Summary**—A checkbox to allow the component value to be saved in a note once a questionnaire is resolved. The note is accessible in the **Notes** tab of the **Clinical App**. **!** Not available in the Note Builder for a note. **Validation Tab:**

Type	Component	Description
		• **Required**—A checkbox 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:** • **This component should Display:**—Choose **True** or **False** to display this component within the questionnaire based on the field values in **When the form component:** and **Has the value:**. – Selecting **True** will display the component when the conditional statement is met. – Selecting **False** will initially display the component and when the conditional statement is met, the component will be hidden. • **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.
Basic	**Text Area**	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: **Display Tab:** • **Label**—The label that will appear above the **Text Area** on the questionnaire. • **Placeholder**—Placeholder text is temporary text that will appear in the **Text Area** before there is user interaction. • **Description**—Description text that will appear below the **Text Area** on the questionnaire. • **Rows**—Provides the ability to add rows to the Text Area. • **Tooltip**—A tooltip that will appear on the right side of the **Label** on the questionnaire.

Type	Component	Description
		• **Hide Label**—A checkbox to hide the label of this component. This allows you to hide the label in the form builder, but not when it's rendered. • **Disabled**—A checkbox to allow the **Text Area** to be disabled. **Data Tab:** • **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 checkbox to allow the **Text Area** value to be saved to the patient profile. **!** Not available in the Note Builder for a note. • **Save to Note Summary**—A checkbox to allow the component value to be saved in a note once a questionnaire is resolved. The note is accessible in the **Notes** tab of the **Clinical App**. **!** Not available in the Note Builder for a note. **Validation Tab:** • **Required**—A checkbox to require the **Text Area** to be filled in before the questionnaire is submitted. • **Minimum Length**—The minimum length of characters that the **Text Area** must meet. • **Maximum Length**—The maximum length of characters that the **Text Area** must meet. **Conditional Tab:** • **This component should Display:**—Choose **True** or **False** to display this component within the questionnaire based on the field values in **When the form component:** and **Has the value:**. – Selecting **True** will display the component when the conditional statement is met. – Selecting **False** will initially display the component and when the conditional statement is met, the component will be hidden.

Type	Component	Description
		• **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.
Basic	**Number**	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: **Display Tab:** • **Label**—The label that will appear above the **Number** component on the questionnaire. • **Placeholder**—Placeholder text is temporary text that will appear in the **Number** component before there is user interaction. • **Description**—Description text that will appear below the **Number** component on the questionnaire. • **Tooltip**—A tooltip that will appear on the right side of the **Label** on the questionnaire. • **Hide Label**—A checkbox to hide the label of this component. This allows you to hide the label in the form builder, but not when it's rendered. • **Disabled**—A checkbox to allow the **Number** component to be disabled. **Data Tab:** • **Use Thousands Separator**—checkbox to separate thousands by local delimiter. • **Decimal Places**—The maximum number or decimal places. • **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 checkbox to allow the **Number** component value to be saved to the patient profile. **!** Not available in the Note Builder for a note.

Type	Component	Description
		• **Save to Note Summary**—A checkbox to allow the component value to be saved in a note once a questionnaire is resolved. The note is accessible in the **Notes** tab of the **Clinical App**. **!** Not available in the Note Builder for a note. **Validation Tab:** • **Required**—A checkbox to require the **Number** component to be filled in before the questionnaire is submitted. • **Minimum Length**—The minimum value that the component must meet. • **Maximum Length**—The maximum value that the component must meet. **Conditional Tab:** • **This component should Display:**—Choose **True** or **False** to display this component within the questionnaire based on the field values in **When the form component:** and **Has the value:**. – Selecting **True** will display the component when the conditional statement is met. – Selecting **False** will initially display the component and when the conditional statement is met, the component will be hidden. • **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.
Basic	**Currency**	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: **Display Tab:** • **Label**—The label that will appear above the **Currency** component on the questionnaire. • **Placeholder**—Placeholder text is temporary text that will appear in the **Number** component before there is user interaction.

Type	Component	Description
		• **Description**—Description text that will appear below the **Currency** component on the questionnaire. • **Tooltip**—A tooltip that will appear on the right side of the **Label** on the questionnaire. • **Hide Label**—A checkbox to hide the label of this component. This allows you to hide the label in the form builder, but not when it's rendered. • **Disabled**—A checkbox to allow the **Currency** component to be disabled. **Data Tab:** • **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 checkbox to allow the **Currency** component value to be saved to the patient profile. **!** Not available in the Note Builder for a note. • **Save to Note Summary**—A checkbox to allow the component value to be saved in a note once a questionnaire is resolved. The note is accessible in the **Notes** tab of the **Clinical App**. **!** Not available in the Note Builder for a note. **Validation Tab:** • **Required**—A checkbox to require the **Currency** component to be filled in before the questionnaire is submitted. **Conditional Tab:** • **This component should Display:**—Choose **True** or **False** to display this component within the questionnaire based on the field values in **When the form component:** and **Has the value:**. – Selecting **True** will display the component when the conditional statement is met. – Selecting **False** will initially display the component and when the conditional statement is met, the component will be hidden.

<table>
<tr><th>Type</th><th>Component</th><th>Description</th></tr>
<tr><td></td><td></td><td>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.</td></tr>
<tr><td>Basic</td><td>Phone Number</td><td>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:

Display Tab:
Label—The label that will appear above the Phone Number on the questionnaire.
Placeholder—Placeholder text is temporary text that will appear in the Phone Number before there is user interaction.
Description—Description text that will appear below the Phone Number on the questionnaire.
Tooltip—A tooltip that will appear on the right side of the Label on the questionnaire.
Hide Label—A checkbox to hide the label of this component. This allows you to hide the label in the form builder, but not when it's rendered.
Disabled—A checkbox to allow the Phone Number to be disabled.
Data Tab:
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 checkbox to allow the Phone Number value to be saved to the patient profile.

! Not available in the Note Builder for a note.
Save to Note Summary—A checkbox to allow the component value to be saved in a note once a questionnaire is resolved. The note is accessible in the Notes tab of the Clinical App.</td></tr>
</table>

<table>
<tr><th>Type</th><th>Component</th><th>Description</th></tr>
<tr><td></td><td></td><td>
! Not available in the Note Builder for a note.
Validation Tab:

Required—A checkbox to require the Phone Number to be filled in before the questionnaire is submitted.

Conditional Tab:

This component should Display:—Choose True or False to display this component within the questionnaire based on the field values in When the form component: and Has the value:.

Selecting True will display the component when the conditional statement is met.
Selecting False will initially display the component and when the conditional statement is met, the component will be hidden.

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.

</td></tr>
<tr><td>Basic</td><td>Content</td><td>
This is a read only input field and the content of the field is defined by an Admin. This is not available for a Note. The following is a description of the options on each tab:

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.

Display Tab:

Label—The label that will appear above the Content component on the questionnaire.

Conditional Tab:

This component should Display:—Choose True or False to display this component within the questionnaire based on the field values in When the form component: and Has the value:.

Selecting True will display the component when the conditional statement is met.

</td></tr>
</table>

Type	Component	Description
		– Selecting **False** will initially display the component and when the conditional statement is met, the component will be hidden. • **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.
Basic	**Date / Time**	This input field allows a user to select a date and time value. The following is a description of the options on each tab: **Display Tab:** • **Label**—The label that will appear above the **Date / Time** component on the questionnaire. • **Placeholder**—Placeholder text is temporary text that will appear in the **Number** component before there is user interaction. **!** Not available in the Note Builder for a note. • **Description**—Description text that will appear below the **Date / Time** component on the questionnaire. • **Tooltip**—A tooltip that will appear on the right side of the **Label** on the questionnaire. • **Hide Label**—A checkbox to hide the label of this component. This allows you to hide the label in the form builder, but not when it's rendered. • **Disabled**—A checkbox to allow the **Date / Time** component to be disabled. **Date Tab:** • **Enable Date Input**—Enables a pop-up calendar in order to select a date and time. • **Minimum Date**—The minimum date that can be picked. • **Maximum Date**—The maximum date that can be picked. • **Disable specific dates or dates by range**—Allows you to enter dates you want to blacklist.

Type	Component	Description
		• **Disable weekends**—A checkbox to disable weekends. • **Disable weekdays**—A checkbox to disable weekdays. **Time Tab:** • **Enable Time Input**—Enables time input for this field. • **Hour Step Size**—The number of hours to increment/decrement in the time picker. • **Minute Step Size**—The number of minutes to increment/decrement in the time picker. • **12 Hour Time (AM/PM)**—Display the time in 12-hour time with AM/PM. **Data Tab:** • **Default Date**—You can use Moment.js functions to set the default value to a specific date, for example moment().subtract(10 'days'). **!** Not available in the Note Builder for a note. • **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 checkbox to allow the **Day / Time** values to be saved to the patient profile. **!** Not available in the Note Builder for a note. • **Save to Note Summary**—A checkbox to allow the component value to be saved in a note once a questionnaire is resolved. The note is accessible in the **Notes** tab of the **Clinical App**. **!** Not available in the Note Builder for a note. **Validation Tab:** • **Required**—A checkbox to require the **Date / Time** component to be filled in before the questionnaire is submitted. **Conditional Tab:** • **This component should Display:**—Choose **True** or **False** to display this component within the questionnaire based on the field

Type	Component	Description
		values in **When the form component:** and **Has the value:**. – Selecting **True** will display the component when the conditional statement is met. – Selecting **False** will initially display the component and when the conditional statement is met, the component will be hidden. • **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.
Basic	**Time**	This input field allows a user to select a specific time. The following is a description of the options on each tab: **Display Tab:** • **Label**—The label that will appear above the **Time** component on the questionnaire. • **Description**—Description text that will appear below the **Time** component on the questionnaire. • **Tooltip**—A tooltip that will appear on the right side of the **Label** on the questionnaire. • **Hide Label**—A checkbox to hide the label of this component. This allows you to hide the label in the form builder, but not when it's rendered. • **Disabled**—A checkbox to allow the **Time** component to be disabled. **Data Tab:** • **Data Format**—The format of **Time**, for example HH:mm:ss. • **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 checkbox to allow the **Time** value to be saved to the patient profile.

Type	Component	Description
		!Not available in the Note Builder for a Note. • **Save to Note Summary**—A checkbox to allow the component value to be saved in a note once a questionnaire is resolved. The note is accessible in the **Notes** tab of the **Clinical App**. **!** Not available in the Note Builder for a note. **Validation Tab:** • **Required**—A checkbox to require the **Time** to be filled in before the questionnaire is submitted. **Conditional Tab:** • **This component should Display:**—Choose **True** or **False** to display this component within the questionnaire based on the field values in **When the form component:** and **Has the value:**. – Selecting **True** will display the component when the conditional statement is met. – Selecting **False** will initially display the component and when the conditional statement is met, the component will be hidden. • **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.
Basic	**Checkbox**	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: **Display Tab:** • **Label**—The label that will appear above the **Checkbox** component on the questionnaire. • **Description**—Description text that will appear below the **Checkbox** component on the questionnaire. • **Tooltip**—A tooltip that will appear on the right side of the **Checkbox** on the questionnaire.

Type	Component	Description
		• **Hide Label**—A checkbox to hide the label of this component. This allows you to hide the label in the form builder, but not when it's rendered. • **Disabled**—A checkbox to allow the **Checkbox** component to be disabled. **Data Tab:** • **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 checkbox to allow the **Checkbox** component value to be saved to the patient profile. **!** Not available in the Note Builder for a note. • **Save to Note Summary**—A checkbox to allow the component value to be saved in a note once a questionnaire is resolved. The note is accessible in the **Notes** tab of the **Clinical App**. **!**Not available in the Note Builder for a note. **Validation Tab:** • **Required**—A checkbox to require the **Checkbox** component to be filled in before the questionnaire is submitted. **Conditional Tab:** • **This component should Display:**—Choose **True** or **False** to display this component within the questionnaire based on the field values in **When the form component:** and **Has the value:**. – Selecting **True** will display the component when the conditional statement is met. – Selecting **False** will initially display the component and when the conditional statement is met, the component will be hidden. • **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

Type	Component	Description
		for the form component selected above to complete the conditional statement.
Basic	**Select Boxes**	This is a group of checkboxes 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: **Display Tab:** • **Label**—The label that will appear above the **Select Boxes** component on the questionnaire. • **Description**—Description text that will appear below the **Select Boxes** component on the questionnaire. • **Tooltip**—A tooltip that will appear on the right side of the **Select Boxes** on the questionnaire. • **Inline Layout**—A checkbox to allow the **Select Boxes** component to be display horizontally. • **Hide Label**—A checkbox to hide the label of this component. This allows you to hide the label in the form builder, but not when it's rendered. • **Disabled**—A checkbox to allow the **Select Boxes** component to be disabled. **Data Tab:** • **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**. • **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 checkbox to allow the **Select Boxes** value to be saved to the patient profile. **!** Not available in the Note Builder for a note. • **Save to Note Summary**—A checkbox to allow the component value to be saved in a note once a questionnaire is resolved. The note is accessible in the **Notes** tab of the **Clinical App**. **!** Not available in the Note Builder for a note.

<table>
<tr><th>Type</th><th>Component</th><th>Description</th></tr>
<tr><td></td><td></td><td>Validation Tab:
Required—A checkbox to require the Select Boxes component to be filled in before the questionnaire is submitted.
Minimum checked number—Minimum checked boxes before the form can be submitted.
Maximum checked number—Maximum checked boxes possible before the form can be submitted.
Conditional Tab:
This component should Display:—Choose True or False to display this component within the questionnaire based on the field values in When the form component: and Has the value:.
Selecting True will display the component when the conditional statement is met.
Selecting False will initially display the component and when the conditional statement is met, the component will be hidden.
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.</td></tr>
<tr><td>Basic</td><td>Select</td><td>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:
Display Tab:
Label—The label that will appear above the Select component on the questionnaire.
Placeholder—Placeholder text is temporary text that will appear in the Select component before there is user interaction.
Description—Description text that will appear below the Select component on the questionnaire.
Tooltip—A tooltip that will appear on the right side of the Select on the questionnaire.</td></tr>
</table>

Type	Component	Description
		• **Hide Label**—A checkbox to hide the label of this component. This allows you to hide the label in the form builder, but not when it's rendered. • **Disabled**—A checkbox to allow the **Select** component to be disabled. **Data Tab:** • **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. • **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 checkbox to allow the **Select** component value to be saved to the patient profile. **!** Not available in the Note Builder for a note. • **Save to Note Summary**—A checkbox to allow the component value to be saved in a note once a questionnaire is resolved. The note is accessible in the **Notes** tab of the **Clinical App**. **!** Not available in the Note Builder for a note. **Validation Tab:** • **Required**—A checkbox to require the **Select** component to be filled in before the questionnaire is submitted. **Conditional Tab:** • **This component should Display:**—Choose **True** or **False** to display this component within the questionnaire based on the field values in **When the form component:** and **Has the value:**. – Selecting **True** will display the component when the conditional statement is met. – Selecting **False** will initially display the component and when the conditional statement is met, the component will be hidden.

Type	Component	Description
		• **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.
Basic	**Radio**	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: **Display Tab:** • **Label**—The label that will appear above the **Radio** button on the questionnaire. • **Description**—Description text that will appear below the **Radio** button on the questionnaire. • **Tooltip**—A tooltip that will appear on the right side of the **Radio** button on the questionnaire. • **Inline Layout**—A checkbox to allow the **Radio** button to be display horizontally. • **Hide Label**—A checkbox to hide the label of this component. This allows you to hide the label in the form builder, but not when it's rendered. • **Disabled**—A checkbox to allow the **Radio** button to be disabled. **Data Tab:** • **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. • **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 checkbox to allow the **Radio** button value to be saved to the patient profile. **!** Not available in the Note Builder for a note. • **Save to Note Summary**—A checkbox to allow the component

Type	Component	Description

		value to be saved in a note once a questionnaire is resolved. The note is accessible in the **Notes** tab of the **Clinical App**.
		
		! Not available in the Note Builder for a note.
		
		Validation Tab:
		
		• **Required**—A checkbox to require the **Radio** button to be filled in before the questionnaire is submitted.
		
		Conditional Tab:
		
		• **This component should Display:**—Choose **True** or **False** to display this component within the questionnaire based on the field values in **When the form component:** and **Has the value:**.
		  – Selecting **True** will display the component when the conditional statement is met.
		  – Selecting **False** will initially display the component and when the conditional statement is met, the component will be hidden.
		
		• **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.

Clinical	**Blood Sugar**	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: **Data Tab:** • **Fasting Glucose mg/dl**—A checkbox to include this blood sugar measurement. • **Postprandial Glucose mg/dl**—A checkbox to include this blood sugar measurement. • **A1C mg/dl**—A checkbox to include this blood sugar measurement. • **Save to Patient Profile**—A checkbox to allow the **Blood Sugar** value to be saved to the patient profile.

<table>
<tr><th>Type</th><th>Component</th><th>Description</th></tr>
<tr><td></td><td></td><td>
! Not available in the Note Builder for a note.
Save to Note Summary—A checkbox to allow the component value to be saved in a note once a questionnaire is resolved. The note is accessible in the Notes tab of the Clinical App.

! Not available in the Note Builder for a note.
Validation Tab:

Require Fasting Glucose—A checkbox to require this blood sugar measurement.
Require Postprandial Glucose—A checkbox to require this blood sugar measurement.
Require A1C—A checkbox to require this blood sugar measurement.

Conditional Tab:

This component should Display:—Choose True or False to display this component within the questionnaire based on the field values in When the form component: and Has the value:.

Selecting True will display the component when the conditional statement is met.
Selecting False will initially display the component and when the conditional statement is met, the component will be hidden.

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.

</td></tr>
<tr><td>Clinical</td><td>Blood Pressure</td><td>
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:

Data Tab:

Systolic—A checkbox to include this blood pressure measurement.

</td></tr>
</table>

Type	Component	Description
		• **Diastolic**—A checkbox to include this blood pressure measurement. • **Pulse**—A checkbox to include this blood pressure measurement. • **Save to Patient Profile**—A checkbox to allow the **Radio** component value to be saved to the patient profile. **!** Not available in the Note Builder for a note. **Validation Tab:** • **Require Systolic**—A checkbox to require this blood pressure measurement. • **Require Diastolic**—A checkbox to require this blood pressure measurement. • **Require Pulse Rate**—A checkbox to require this blood pressure measurement. • **Save to Note Summary**—A checkbox to allow the component value to be saved in a note once a questionnaire is resolved. The note is accessible in the **Notes** tab of the **Clinical App**. **!** Not available in the Note Builder for a note. **Conditional Tab:** • **This component should Display:**—Choose **True** or **False** to display this component within the questionnaire based on the field values in **When the form component:** and **Has the value:**. – Selecting **True** will display the component when the conditional statement is met. – Selecting **False** will initially display the component and when the conditional statement is met, the component will be hidden. • **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.
Clinical	**Cholesterol**	A group of input fields for Cholesterol including LDL Cholesterol, HDL

Type	Component	Description

		Cholesterol, Total Cholesterol, and Triglycerides. Each value can be configured to independently. The following is a description of the options on each tab:
		
		Data Tab:
		
		• **LDL Cholesterol mg/dl**—A checkbox to include this cholesterol measurement.
		• **HDL Cholesterol mg/dl**—A checkbox to include this cholesterol measurement.
		• **Total Cholesterol mg/dl**—A checkbox to include this cholesterol measurement.
		• **Triglycerides mg/dl**—A checkbox to include this cholesterol measurement.
		• **Save to Patient Profile**—A checkbox to allow the cholesterol measurement to be saved to the patient profile.
		• **Save to Note Summary**—A checkbox to allow the component value to be saved in a note once a questionnaire is resolved. The note is accessible in the **Notes** tab of the **Clinical App**.
		
		Validation Tab:
		
		• **Require LDL Cholesterol**—A checkbox to require this cholesterol measurement.
		• **Require HDL Cholesterol**—A checkbox to require this cholesterol measurement.
		• **Require Total Cholesterol**—A checkbox to require this cholesterol measurement.
		• **Require Triglycerides**—A checkbox to require this cholesterol measurement.
		
		Conditional Tab:
		
		• **This component should Display:**—Choose **True** or **False** to display this component within the questionnaire based on the field values in **When the form component:** and **Has the value:**.
		    – Selecting **True** will display the component when the conditional statement is met.
		    – Selecting **False** will initially display the component and when

<table>
<tr><th>Type</th><th>Component</th><th>Description</th></tr>
<tr><td></td><td></td><td>the conditional statement is met, the component will be hidden.

• 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.</td></tr>
<tr><td>Clinical</td><td>Body Mass Index</td><td>An input field to capture Body Mass Index. The following is a description of the options on each tab:

Data Tab:

• Body Mass Index—A checkbox to include BMI.

• Save to Patient Profile—A checkbox to allow the Body Mass Index value to be saved to the patient profile.

! Not available in the Note Builder for a Note.

• Save to Note Summary—A checkbox to allow the component value to be saved in a note once a questionnaire is resolved. The note is accessible in the Notes tab of the Clinical App.

! Not available in the Note Builder for a note.

Validation Tab:

• Required—A checkbox to require the Body Mass Index to be filled in before the questionnaire is submitted.

Conditional Tab:

• This component should Display:—Choose True or False to display this component within the questionnaire based on the field values in When the form component: and Has the value:.

– Selecting True will display the component when the conditional statement is met.

– Selecting False will initially display the component and when the conditional statement is met, the component will be hidden.

• When the form component:—Select an existing form component of your questionnaire that will be used as a reference for the</td></tr>
</table>

Type	Component	Description
		condition. • **Has the value:**—Define the value captured in the questionnaire for the form component selected above to complete the conditional statement.
Clinical	**Program Code**	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: **Display Tab:** • **Label**—The label that will appear above the **Select** component on the questionnaire. • **Description**—Description text that will appear below the **Select** component on the questionnaire. • **Tooltip**—A tooltip that will appear on the right side of the **Select** on the questionnaire. • **Hide Label**—A checkbox to hide the label of this component. This allows you to hide the label in the form builder, but not when it's rendered. **Data Tab:** • **Program Codes**—Allows for the association of codes to a patient. Use the **Add Another** button to add additional codes. • **Save to Patient Profile**—A checkbox to allow the information to be saved to the patient profile. • **Save to Note Summary**—A checkbox to allow the component value to be saved in a note once a questionnaire is resolved. The note is accessible in the **Notes** tab of the **Clinical App**. **!** Not available in the Note Builder for a note. **Conditional Tab:** • **This component should Display:**—Choose **True** or **False** to display this component within the questionnaire based on the field values in **When the form component:** and **Has the value:**. – Selecting **True** will display the component when the conditional statement is met. – Selecting **False** will initially display the component and when

Type	Component	Description
		the conditional statement is met, the component will be hidden. • **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.
Clinical	**Rx Search**	A field that can be added to a questionnaire that allows the user the ability to search through prescriptions from the last 12 months and select one or more of the Patient's prescriptions from the Pharmacy Management System. In addition, when Rx's are selected the corresponding fill information is also included, such as Product, SIG and Prescriber. **Display Tab:** • **Label**—The label that will appear above the search field on the questionnaire. • **Placeholder**—Placeholder text is temporary text that will appear in the search field before there is user interaction. • **Description**—Description text that will appear below the search field on the questionnaire. • **Hide Label**—A checkbox to hide the label of this component. This allows you to hide the label in the form builder, but not when it's rendered • **Tooltip**—A tooltip that will appear on the right side of the **Label** on the questionnaire. **Data Tab:** • **Allow selection of multiple Rxs**—A checkbox to allow multiple Rxs to be selected on the questionnaire. • **Associate Fill with Rx Selection**—A checkbox to allow the Fill values to be saved along with the Rx numbers. • **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.

Type	Component	Description
		• **Save to Patient Profile**—A checkbox to allow the **Rx Search** field values to be saved to the patient profile. **!** Not available in the Note Builder for a note. • **Save to Note Summary**—A checkbox to allow the component value to be saved in a note once a questionnaire is resolved. The note is accessible in the **Notes** tab of the **Clinical App**. **!**Not available in the Note Builder for a note. **Validation Tab:** • **Required**—A checkbox to require the **Text Field** to be filled in before the questionnaire is submitted. • **Minimum Number**—The minimum amount of numbers that the **Rx Search Field** must meet. • **Maximum Number**—The maximum amount of numbers that the **Rx Search Field** must meet. **Conditional Tab:** • **This component should Display:**—Choose **True** or **False** to display this component within the questionnaire based on the field values in **When the form component:** and **Has the value:**. – Selecting **True** will display the component when the conditional statement is met. – Selecting **False** will initially display the component and when the conditional statement is met, the component will be hidden. • **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.
Layout	**Tabs**	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: **Display Tab:**

Type	Component	Description
		• **Label**—The label that will appear above the component on the questionnaire. • **Tabs**—The **Label** and **Key** for the tab. Use the **Add Another** button to add additional tabs. **Conditional Tab:** • **This component should Display:**—Choose **True** or **False** to display this component within the questionnaire based on the field values in **When the form component:** and **Has the value:**. – Selecting **True** will display the component when the conditional statement is met. – Selecting **False** will initially display the component and when the conditional statement is met, the component will be hidden. • **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.
Layout	**Columns**	Organize questionnaire components into columns. The following is a description of the options on each tab: **Display Tab:** • **Label**—The label that will appear above the component on the questionnaire. • **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. • **Hide Label**—A checkbox to hide the label of this component. This allows you to hide the label in the form builder, but not when it's rendered. **Conditional Tab:** • **This component should Display:**—Choose **True** or **False** to display this component within the questionnaire based on the field values in **When the form component:** and **Has the value:**.

Type	Component	Description
		– Selecting **True** will display the component when the conditional statement is met. – Selecting **False** will initially display the component and when the conditional statement is met, the component will be hidden. • **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.
Layout	**Table**	Organize questionnaire components into a table of rows and columns. The following is a description of the options on each tab: **Display Tab:** • **Label**—The label that will appear above the component on the questionnaire. • **Number of Rows**—Enter the number of rows for the table. • **Number or Columns**—Enter the number of columns for the table. • **Striped**—A checkbox to stripe the table. • **Bordered**—A checkbox to add a border to the table. • **Hover**—A checkbox to add the ability to hover and highlight a row. **Conditional Tab:** • **This component should Display:**—Choose **True** or **False** to display this component within the questionnaire based on the field values in **When the form component:** and **Has the value:**. – Selecting **True** will display the component when the conditional statement is met. – Selecting **False** will initially display the component and when the conditional statement is met, the component will be hidden. • **When the form component:**—Select an existing form component of your questionnaire that will be used as a reference for the condition.

<table>
<tr><th>Type</th><th>Component</th><th>Description</th></tr>
<tr><td></td><td></td><td>Has the value:—Define the value captured in the questionnaire for the form component selected above to complete the conditional statement.</td></tr>
<tr><td>Layout</td><td>Panel</td><td>Organize questionnaire components into a panel arrangement. The following is a description of the options on each tab:

Display Tab:
Title—Title text that appears in the header of the panel.
Theme—Choose one of three available themes for the panel.
Custom CSS Class—Add Custom CSS Class to the panel.
Collapsible—A checkbox to allow the panel to be collapsible.
Conditional Tab:
This component should Display:—Choose True or False to display this component within the questionnaire based on the field values in When the form component: and Has the value:.
Selecting True will display the component when the conditional statement is met.
Selecting False will initially display the component and when the conditional statement is met, the component will be hidden.
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.</td></tr>
<tr><td>Layout</td><td>Well</td><td>Organize questionnaire components into a well container that displays with rounded corners and a gray background.

Display Tab:
Label—The label that will appear above the component on the questionnaire.
Conditional Tab:
This component should Display:—Choose True or False to display this component within the questionnaire based on the field</td></tr>
</table>

Type	Component	Description
		values in **When the form component:** and **Has the value:**. – Selecting **True** will display the component when the conditional statement is met. – Selecting **False** will initially display the component and when the conditional statement is met, the component will be hidden. • **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.

Enrollment and Program Alert Data Filters

Data	Attribute	EnterpriseRx Value(s)
Written Product	**Product Name**	Text/Search Field
Written Product	**NDC Number 11 Digits**	Text/Search Field
Written Product	**NDC Number 9 Digits**	Text/Search Field
Written Product	**NDC Number 5 Digits**	Text/Search Field
Written Product	**Product Schedule**	• 2 • 3 • 4 • 5 • 6 - Legend Rx • 8 - OTC • Blank - No Control
Written Product	**GPI GCN**	Text/Search Field
Dispensed Product	**Product Name**	Text/Search Field
Dispensed Product	**NDC Number 11 Digits**	Text/Search Field
Dispensed Product	**NDC Number 9 Digits**	Text/Search Field
Dispensed Product	**NDC Number 5 Digits**	Text/Search Field
Dispensed Product	**Product Schedule**	• 2 • 3 • 4 • 5 • 6 - Legend Rx • 8 - OTC • Blank - No Control
Dispensed Product	**GPI GCN**	Text/Search Field
Dispensed Product	**Product Groups**	Text Field
Patient	**Patient Status**	Active
Patient	**Enrolled Programs**	Populated by CPS
Patient	**Non Enrolled Programs**	Populated by CPS
Patient	**Blood Pressure Systolic**	Populated by CPS
Patient	**Blood Pressure Diastolic**	Populated by CPS
Patient	**Blood Glucose Fasting**	Populated by CPS
Patient	**Blood Glucose Postprandial**	Populated by CPS

Data	Attribute	EnterpriseRx Value(s)
Patient	**Blood Glucose A1c**	Populated by CPS
Patient	**Cholesterol LDL**	Populated by CPS
Patient	**Cholesterol HDL**	Populated by CPS
Patient	**Total Cholesterol**	Populated by CPS
Patient	**Triglycerides**	Populated by CPS
Patient	**BMI**	Populated by CPS
Patient	**Pulse**	Populated by CPS
Patient	**Cholesterol PDC**	Populated by CPS/APS
Patient	**Hypertension PDC**	Populated by CPS/APS
Patient	**Diabetes PDC**	Populated by CPS/APS
Patient	**SUPD**	Populated by CPS/APS
Patient	**HRM**	Populated by CPS/APS
Patient	**Codes**	Populated by CPS
Patient	**Additional Data**	Populated by CPS
Patient	**Patient Groups**	Text Field
Patient	**Smoker Code**	1. Non Smoker 2. Smoker Blank - Not Specified
Patient	**Pregnancy Indicator**	1. Not Pregnant 2. Pregnant Blank - Not Specified
Patient	**Terminally Ill**	• Yes • No
Patient	**Age**	Text Field
Patient	**Allergy Code**	Text/Search Field
Patient	**Allergy Description**	Text Field *[1]
Patient	**Gender Code**	• Male • Female
Patient	**Zip**	Text Field
Patient	**State**	Text Field
Patient	**Care Location**	0. Not Specified 1. Home 2. Inner Care

[1] EnterpriseRx 9.1.0.0 or Greater

Data	Attribute	EnterpriseRx Value(s)
		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**	• Retail Store • Central Prep • Central Fulfillment • Corporate Office • Call Center • Training Center
Facility	**State**	Text Field
Facility	**Zip**	Text Field
Facility	**NCPDP Provider ID**	Text Field
Rx	**Rx Status**	• Active • Profiled • Canceled • Pending Approval • Inactive • DUR Rx • Transferred • Inactive Profiled • Inactive DUR Rx • Denied
Rx	**Rx Fill**	• New

Data	Attribute	EnterpriseRx Value(s)
		• Refill
Rx	**Prescription Origin Code**	0. Not Known 1. Written 2. Telephone 3. Electronic 4. Facsimile 5. Pharmacy Blank
Fill Level	**Item Source**	• Unspecified • SYNC • IVR • PPI • Fax • ERP • Phone • Mail • Internet • Store
Fill Level	**Delivery Option**	Text Field
Fill Level	**Fill Number**	Text Field
Fill Level	**Third Party Name**	Text Field
Fill Level	**Third Party Code**	Text Field
Fill Level	**Group ID**	Text Field *[1]
Fill Level	**Cash Payment**	Text Field *[1]
Fill Level	**Third Party Group ID**	Text Field *[1]
Fill Level	**Third Party PCN**	Text Field *[1]
Fill Level	**Third Party BIN**	Text Field *[1]

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Data	Attribute	EnterpriseRx Value(s)
Fill Level	**Third Party Cardholder ID**	Text Field *[1]
Fill Level	**Medicare**	• Yes • No
Fill Level	**Medicaid**	• Yes • No
Fill Level	**Specialty Program Name**	Text Field
Fill Level	**Specialty Program Type**	Text Field
Fill Level	**Specialty Program Sub Type**	Text Field
Fill Level	**Refills Remaining**	Number Field
Fill Level	**Days Supply**	Number Field
Fill Level	**Therapy Type**	New Continued Change
Fill Level	**Payment Pay Amount**	Currency Number
Fill Level	**Delivery Option**	Text Field
Order	**Shipping Address Confirmed**	• Yes • No
Order	**High Priority**	• Yes • No
Order	**Patient Payment Confirmation**	• Yes • No
Prescriber	**Specialty 1**	See System Options
Prescriber	**Specialty 2**	See System Options
Prescriber	**Specialty 3**	See System Options
Prescriber	**State**	Text Field
Prescriber	**Zip**	Test Field
Prescriber	**NPI**	Text Field *[1]
Prescriber	**DEA**	Text Field *[1]

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