McKESSON Canada

propel Rx

ALBERTA REAL TIME INTEGRATION (RTI)

USER GUIDE

PHARMACY TECHNOLOGY SOLUTIONS
A DIVISION OF McKESSON CANADA

Revision History

To maintain the accuracy of this document, any changes made will be noted in the table below. Please refer to this section before using this document to ensure no updates were made to the content you may be referencing.

Date	Revision
June 28, 2024	• Under Pharmacist Prescribing, added the section, Dispensing a Medication but Not Prescribing. • Under Sample Detected Issues, added a Detected Issue that can be returned when dispensing a pharmacist prescribed medication.
July 12, 2024	• Under Rebilling a Prescription, removed the Alert that stated historical prescriptions in a chain cannot be rebilled. This ability is now available.
July 25, 2024	• Under Pharmacist Prescribing, updated the scenario where a Create Message is sent and the steps for filling a pharmacist prescribed medication because of this change. • Under Sample Detected Issues, removed the Detected Issue that used to be returned when there was a mismatch between the prescriber and processing user for a pharmacist prescribed medication.
August 16, 2024	• Under Logging into Propel Rx and Setting Up Users with EHR Access, added details on where to source the RSA ID, EHR User ID, RSA Passcode, and EHR Password in the EHR Login window. • Under Troubleshooting Login Issues, added a recommendation to turn off EHR Availability if login issues persist and contacting Alberta Netcare Help Desk to confirm username(s) and EHR password.

Helpful Links

Need more information on how to use Propel Rx? Refer to the Propel Rx Online Help.

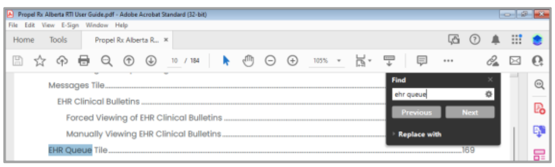
How to Use this User Guide

To navigate this user guide quickly, use the **Table of Contents** to find your topic or search for a keyword using one of the following features:

- **Find Feature** – Searches the PDF for your keyword and displays one result at a time in sequential order.
- **Advanced Search Feature** – Searches the PDF for your keyword and displays all the pages that contain that keyword on the left side. You can click on any page from the panel, and it will display the content on the side.

To use the Find Feature:

1. Select **Edit** > **Find**. The **Find** window appears.

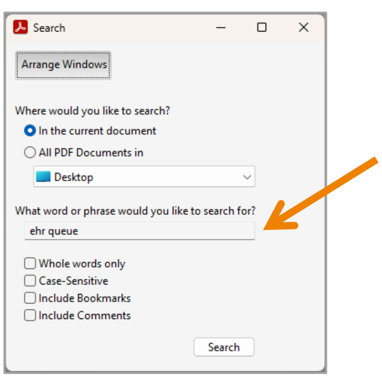


2. Enter in the keyword you want to search (e.g., EHR Queue).
3. Select **Next** to view the next page that contains the keyword you searched.

TIP: The **Find** window can also open by selecting **Ctrl + F** on the keyboard.

Using the Advanced Search Feature:

1. Select **Edit** > **Advanced Search.** The **Search** window opens.



2. Enter in the keyword you want to search (e.g., EHR Queue).
3. Select **Search**.
4. From the *Results* returned, select the page you want to view.

TIP: The **Search** window can also open by selecting **Shift + Ctrl + F** on the keyboard.

Contents

Introduction to Real Time Integration (RTI)

Alberta Netcare connects authorized healthcare professionals, including pharmacists, with a patient's Electronic Health Record (EHR) to support patient care.

When RTI is activated at your pharmacy, you can seamlessly communicate and access information on the EHR. This process allows a patient's EHR Profile to be complete with vital clinical information that's important for appropriate and timely care. With EHR integration, you can:

- Search patient records on the EHR and quickly update information in existing Patient Folders or create new ones if needed.
- Access patients' EHR Profiles to inform clinical decisions.
- Update clinical and medication information on the EHR in real-time. RTI replaces the Netcare Batch submission process.
- Copy Allergies/Intolerances and prescription statuses from the EHR into Propel Rx.
- Transmit notes to convey additional information about a patient or record so other healthcare professionals in the circle of care are aware.
- View interaction information returned from the EHR and transmit Issue Management accordingly.
- View Clinical Bulletins from the EHR.
- Manage queued EHR transactions from one place.

ALERT: All personal health information is subject to statutory protection under the Health Information Protection Act (HIPA). As a result, access to patient data for all EHR enabled provinces are limited to those who are authorized and for security purposes by their organization, within user-defined roles.

This user guide will go over the functionality that's introduced when RTI is activated at your pharmacy. For more information on general Propel Rx functionality, please refer to the Propel Rx Online Help.

Glossary of Terms

Terminology	Translation
Adverse Drug Reaction (ADR)	Any adverse event associated with the use of a drug, whether considered drug related or not, including the following: • An adverse event that can occur after using a drug. • An adverse event occurring from a drug overdose. • An adverse event occurring from a drug withdrawal.
Animal	Patient status to indicate the patient is not an active patient, but perhaps a family pet. An Animal record will have no provincial health number. Prescriptions for Animals are not transmitted to the EHR. Patients that had EHR activity will not be entitled to change their status to an Animal.
CeRx	Pan-Canadian Electronic Drug Messaging Standard. Provincial Drug Information Systems comply to this standard.
Clinically Relevant Prescription	A prescription can be deemed clinically relevant by the EHR even if the patient has stopped taking it. Clinical relevance is evaluated by the EHR based on when the drug therapy will likely be completed and the FDB-defined half-life. When a Patient Medication Profile is retrieved, clinical relevance determines whether a prescription will display.
Create, Dispense, and Pickup	These portions of the prescription are recorded on the EHR. The Create is the original prescription information from the prescriber. The Dispense is the act of dispensing the prescription. The Pickup is the act of the patient picking up the medication.
Detected Issue	The list of clinical conflicts that have been detected and recorded involving a patient's drug administration. Within Propel Rx, errors and validations are sometimes displayed via a Detected Issues Maintenance window.
Dispense ID	In Propel Rx, this refers to the unique identifier that the EHR assigns to each dispense. This is not the same as the prescription number.
Electronic Health Record (EHR)	A patient medication profile that resides on the EHR. The EHR checkbox throughout Propel Rx indicates whether the information resides on the EHR.

Terminology	Translation
Electronic Health Record Clinical Bulletins	Notifications about issues impacting the use of the EHR. These are not patient specific.
Electronic Medical Record (EMR)	The electronic medical record systems used by physicians.
Inferred and Non-Inferred Prescriptions	There are 2 types of prescriptions that can be accepted by the EHR: inferred and non-inferred. In most cases, a prescription will be inferred, meaning the EHR infers the prescription from a pharmacy dispense, and a Create message is not sent by the pharmacy. A prescription is non-inferred if it was prescribed by a pharmacist, in which case, the Create and Dispense messages are sent by the pharmacy.
Issue Management	When a Detected Issue is brought to the attention of a healthcare professional, it may be necessary to deal with it by entering an Issue Management(s). The Issue Management provides information to other healthcare professionals regarding the actions or outcomes taken to resolve the Detected Issue(s).
National Association of Pharmacy Regulatory Authorities (NAPRA)	A voluntary association of provincial and territorial pharmacy regulatory bodies, as well as the Canadian Forces Pharmacy Services. NAPRA regulates the practice of pharmacy and operation of pharmacies in their respective jurisdictions in Canada. Their primary mandate is to protect the public.
Other Medication Record	A record of a drug the patient is taking but was not prescribed through the system. This could be a recommended over the counter (OTC) product or a dispense that occurred out of province. This could also be used when a patient is provided a medication sample.
Out of Province	A patient status that indicates the patient does not reside in this province. These patients may or may not exist on the EHR.
Patient Medication Profile	The Patient Medication Profile includes the following on the EHR: • Clinically Relevant Prescriptions • Dispenses • Other Medications • Allergies/Intolerances including associated notes • EHR Professional Services • Patient notes

Terminology	Translation
Personal Health Number (PHN)	Identifier issued to Albertans who are eligible for basic coverage with the Alberta Health Care Insurance Plan. This number is the same as the Unique Lifetime Identifier (ULI), if applicable. **NOTE:** In Alberta, a person can have more than one PHN if they were registered more than once – one primary PHN and one or more secondary PHNs.
Personal Identification Number (P.I.N.)	A 4-digit code assigned to each user by Alberta Health.
Pharmacist ID	Pharmacist Identification number refers to the dispensing pharmacist's license number.
RSA Passcode	The RSA Passcode is used in conjunction with the user's RSA ID to securely access the EHR. If you are using a physical token device (RSA FOB), this is the combination of your 4-digit PIN and 6-digit token number. If you are using a soft token (RSA app), this is the token number only.
RxID	In Propel Rx, this refers to the unique identifier assigned by the EHR for the prescription. This is not the same as the Propel Rx prescription number.
Synchronized	When local patient information, including drug therapy, is synchronized with the information on the EHR. When local patient demographics have been verified against the EHR, this patient is referred to as EHR Sync'd in Propel Rx.
Unique Lifetime Identifier (ULI)	Assigned to a health care patient by Alberta Health. This number changes to an Alberta PHN when they have Alberta Health Insurance Plan coverage.

Logging Into Propel Rx

Only authorized users will be permitted to connect to Alberta Netcare. Every user will be issued unique EHR and RSA credentials, which will be transmitted with each EHR query. After logging into Propel Rx with your Propel Rx User Name and Password, an EHR Login window will appear, allowing you to input your EHR Password and RSA Passcode. You can still log into Propel Rx without entering your EHR credentials, however no activity will be permitted with the EHR (e.g., transmitting prescriptions to the EHR, viewing patient EHR Profiles, etc.).

There are two login layers when you access the EHR. The first layer is an RSA security layer which grants you access to the Netcare network. The second layer grants you access to the EHR. In Propel Rx, you will enter your credentials to pass through both layers in a single EHR Login window.

Logging in With the Propel Rx and EHR Credentials

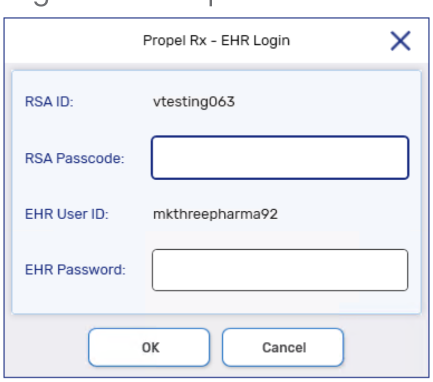
When you log into Propel Rx, any new instance that's opened will assume your user account. You will not need to log into Propel Rx or the EHR again on the new instance within a specified period of time or until the instance is closed.

To log into Propel Rx and the EHR:

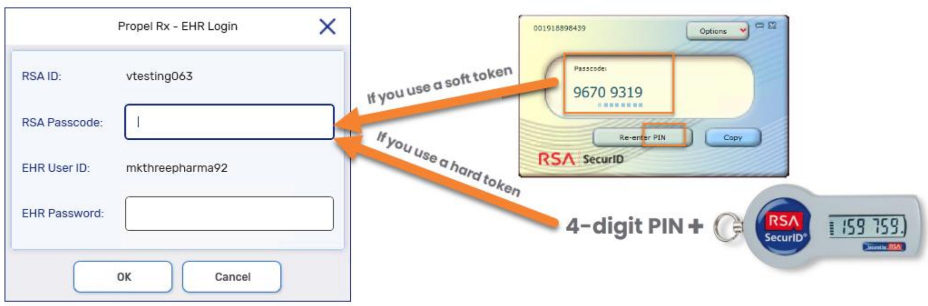
1. Double-click the Propel Rx icon on your desktop.
2. In the **User Name** field, enter your Propel Rx user initials.
3. In the **Password** field, enter your Propel Rx password.

> **NOTE:** If a Biometric Fingerprint Reader exists in your pharmacy and you have already set up your fingerprint for your account, skip steps 2 – 3 by scanning your fingerprint to populate your login credentials.

4. If applicable, select the Pharmacist's initials from the dropdown.
5. Select **Login**. If you have EHR access set up in the Security Administration Facility window, the EHR Login window opens.



6. Enter your **RSA Passcode** and **EHR Password**.
   - **RSA Passcode** – the format you enter depends on the device you are getting your passcode from.
     - If you are using an RSA FOB (hard token) to generate your passcode, enter your 4-digit PIN plus the 6-digit code from the FOB.
     - If you use the RSA app (soft token), enter the 8-digit passcode from the app ONLY. Do NOT enter the 4-digit PIN.

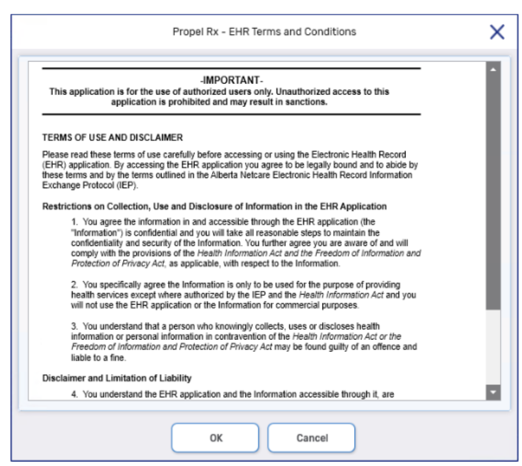


   - **EHR Password** – this is the same password that you would have entered in the Alberta Netcare Portal under **User Settings** at the bottom.

NOTE: If you don't want to log in with EHR access, select **Cancel** in the Network Login window. However, if you perform an action that requires access to the EHR, you will be prompted with the EHR Login window.

7. Select **OK**. If this is your first time logging into the EHR, an EHR Terms and Conditions window appears. Review the information in the window and select **OK**.

NOTE: If you select **Cancel**, you will be logged in without EHR access. The prompt will continue to appear upon login until **OK** is selected. To review the EHR Terms and Conditions after logging in, select **More (...)** > **Alberta** > **EHR Disclaimer**.



Propel Rx launches and you are granted EHR access. Once logged into Propel Rx, your login initials are visible in the top right of the title bar, as shown below. This gives all Propel Rx users visibility of which user is currently logged in and processing prescriptions. An EHR status indicator appears beside the user initials:

- **Green** = logged into the EHR
- **Yellow** = not logged into the EHR

TIP: You can hover over the icon to see your EHR login status.

NOTE: Logging into Propel Rx as the Administrator (ADM) user only launches the Security Administration Facility window. The ADM user does not have access to any other area of Propel Rx and cannot fill prescriptions.

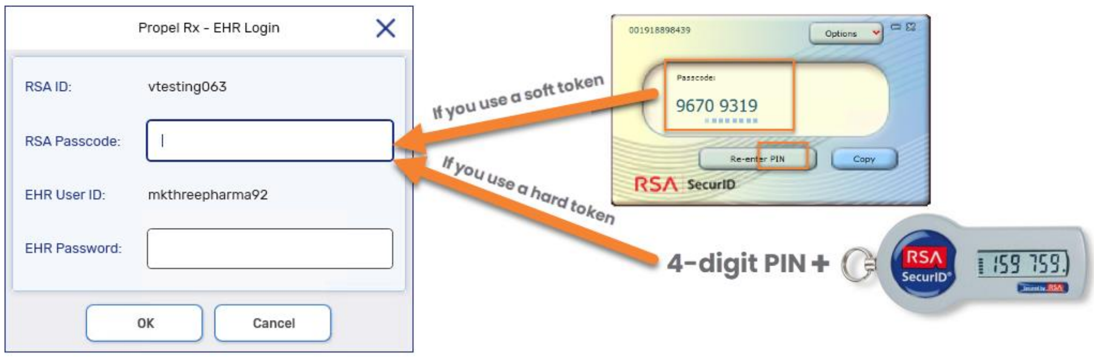
Logging Into the EHR

The EHR Password and RSA Passcode are not required to successfully log into Propel Rx, but they are required to successfully transmit EHR messages and queries. If your EHR Password and RSA Passcode were not entered at login (i.e., selected Cancel in the EHR Login window) and you attempt to perform an action in Propel Rx that requires access to the EHR, you will be prompted with the EHR Login window. You can log into the EHR from the EHR Login prompt or from the More (…) menu.

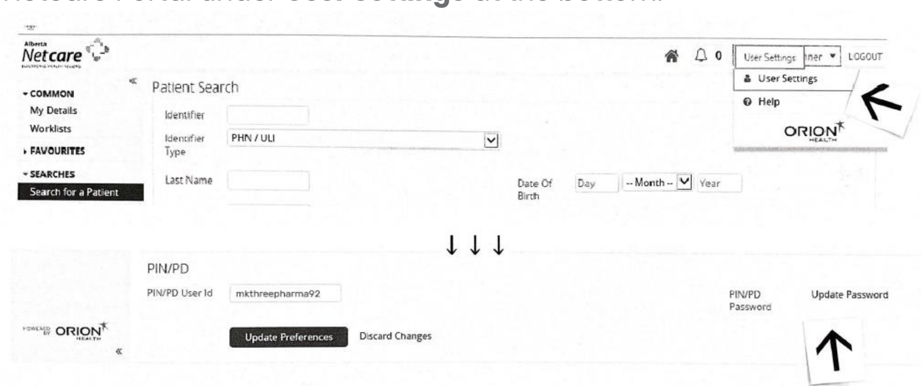
An EHR session times out if there's a period of inactivity in Propel Rx (1.5 hours) or the RSA session elapses (10 hours). When a timeout occurs, you are automatically logged out of the EHR and must log in again with your EHR and RSA credentials (if the RSA session elapsed).

To log into the EHR after logging into Propel Rx:

1. Select **More (…)** > **Alberta** > **EHR Login**. The EHR Login window opens.
2. Enter your **RSA Passcode** and **EHR Password**.
   - **RSA Passcode** – the format you enter depends on the device you are getting your passcode from.
     - If you are using an RSA FOB (hard token) to generate your passcode, enter your 4-digit PIN plus the 6-digit code from the FOB.
     - If you use the RSA app (soft token), enter the 8-digit passcode from the app ONLY. Do NOT enter the 4-digit PIN.

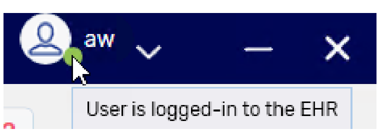


- **EHR Password** – this is the same password that you would have entered in the Alberta Netcare Portal under **User Settings** at the bottom.



3. Select **OK**. A real-time EHR status indicator appears beside your user initials at the top right:
   - **Green** = logged into the EHR
   - **Yellow** = not logged into the EHR

TIP: You can hover over the icon to see your EHR login status.



ALERT: It is imperative that users <u>do not</u> share their Propel Rx or EHR credentials as all EHR activity is transmitted with the corresponding user.

Logging Out of Propel Rx

Logging out of Propel Rx does not log you out of the EHR session. This allows you to log into another workstation without having to log into the EHR again. After 10 hours in an RSA session or 1.5 hours of inactivity in Propel Rx, you are automatically logged out of the EHR session.

To log out of Propel Rx:

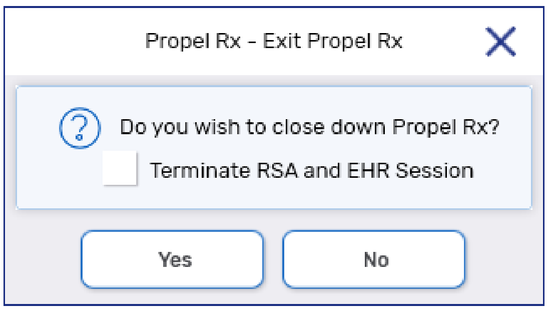
1. Select the arrow button beside your user initials at the top right corner of Propel Rx.
2. Select **Log Off**.

Exiting Propel Rx

When you exit Propel Rx, a prompt asks if you want to stop the RSA and EHR session. If the sessions are stopped, you must enter your EHR Password and RSA Passcode again when you log into Propel Rx.

To exit Propel Rx:

1. Select the exit icon at the top right corner of Propel Rx. An Exit Propel Rx prompt displays.

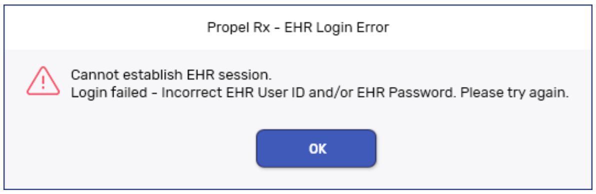


2. Do one of the following:
   - If you want to close the RSA and EHR sessions in addition to Propel Rx, select the **Terminate RSA and EHR Session** checkbox. This will terminate your RSA and EHR sessions on all workstations and instances you're logged into.
   - If you want to exit Propel Rx but keep the RSA and EHR sessions alive, ensure the **Terminate RSA and EHR Session** checkbox is deselected.
3. Select **Yes**.

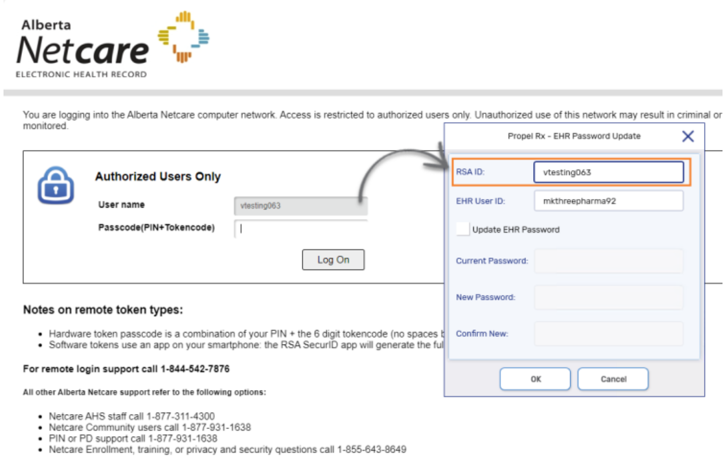
NOTE: If multiple instances are opened for the same user, upon exiting one instance and terminating the RSA and EHR sessions, the user will be logged out of the EHR for the other instances and workstations.

Troubleshooting Login Issues

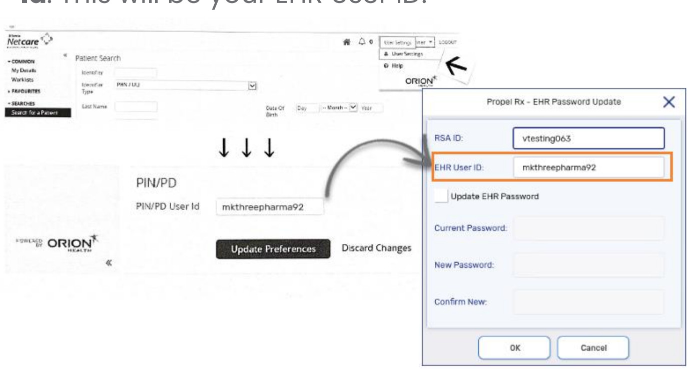
I can't log into the EHR. I get the message that the EHR User ID and/or EHR Password is invalid. What should I do?



1. Confirm your **EHR User ID** and **RSA ID** are entered correctly in **More** (…) > **Security** > **EHR Password**. For some users, the RSA ID and EHR User ID will be the same. For others, they will be different.
   - **RSA ID** – enter the RSA username that you use to log into the Alberta Netcare network as shown below.



   - **EHR User ID** – your EHR User ID can be found in one of two ways:
     - Log into the Alberta Netcare Portal and select **My Details** on the left OR **User Settings** at the top. Scroll to the bottom of the page and locate your **PIN/PD User Id**. This will be your EHR User ID.



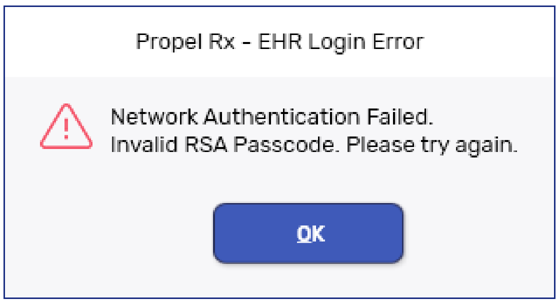
     - The pharmacy licensee can provide the EHR User ID from the **ANP End User report** generated on AHS IAM. Instructions on how to generate this report is provided to the licensee by Alberta Health prior to RTI activation.

2. If your **EHR User ID** and **RSA ID** are correct and you still cannot log in, set the **EHR Availability** to No in Propel Rx so you can continue to process prescriptions. Transactions will be placed in the **EHR Queue** tile for transmission later. For steps on how to do this, see Set the EHR Availability to No.
3. Call the Alberta Netcare Provincial Service Desk at 1-877-931-1638 (option 1). Ask for an Alberta Netcare Portal and PIN/PD password reset.

ALERT: Do NOT reference RTI or Propel Rx (vendor system). These are not supported by the Provincial Service Desk.

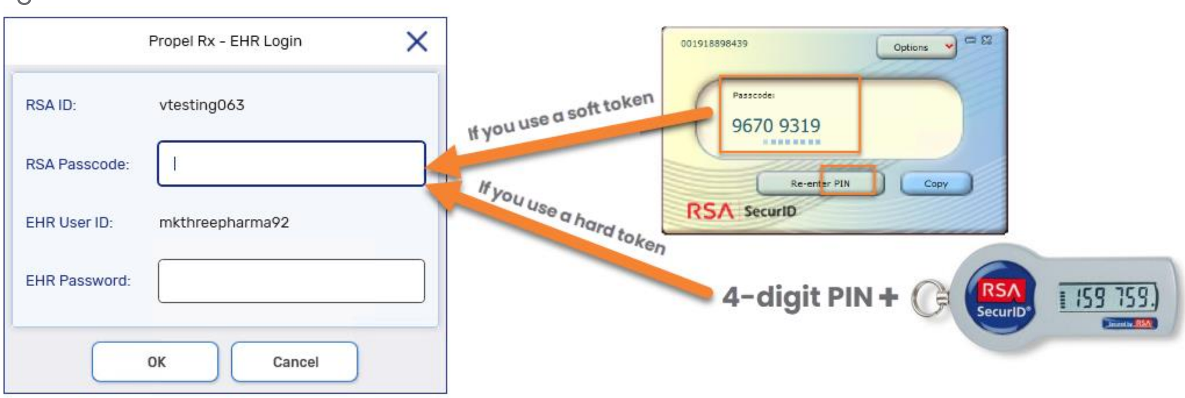
4. Once your password is reset, log back into the EHR from **More** (…) > **Alberta** > **EHR Login**.
5. Once you can log in, set the **EHR Availability** back to Yes. For steps on how to do this, see Sending Transactions When the Network is Restored.

What should I do if I get the message that the RSA Passcode is invalid?



The format of the RSA passcode depends on the device you are getting the passcode from. Ensure you are entering the passcode in the appropriate format.

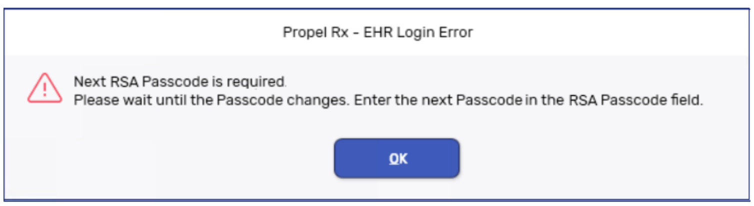
- If you are using an RSA FOB (hard token) to generate your passcode, enter your 4-digit PIN plus the 6-digit code from the FOB.
- If you use the RSA app (soft token), enter the 8-digit passcode from the app ONLY. Do NOT enter the 4-digit PIN.



What should I do if my EHR account is locked?

After incorrectly entering the RSA Passcode 5 times with a valid PIN, your account gets locked. To reset your EHR password, you must contact the Alberta Netcare Help Desk at 1-877-931-1638 (option 1). Do NOT reset the password yourself on the Alberta Netcare Portal.

What should I do if I'm prompted that the next RSA Passcode is required?



Wait until the number changes on your RSA FOB or app and then enter the passcode.

Managing User Accounts

Propel Rx supports role-based access control, allowing different users to have different levels of access depending on their job functions. For example, certain users can be authorized to view Prescriber Folders but not alter them. By mapping such access privileges to a small set of work-related roles, and then assigning users to those roles, the task of administering user privileges is considerably simplified. It also prevents security mistakes that might otherwise occur if each type of access or service had to be directly mapped to each user.

The **Security Administration Facility** window allows authorized users to add or remove users and customize existing user access options. All Propel Rx user accounts can be managed through this window, which is accessed through the **Security** button within the **More** (**...**) menu, or by logging into Propel Rx as the Administrator (ADM) user. The **Security Administration Facility** window has two tabs: Users and Role Types.

The ADM user, or a user with administrator security access, can assign one of the following access types to the various areas/reports listed for each user:

Access Type	Permissions
Full Access	User can view, modify, and edit the specified folder or window.
Read Only Access	User cannot modify or edit but can view the specified folder or window. In some instances, the user can modify their own settings only (e.g., Password, EHR Password, Narcotic Code).
No Access	User cannot view, modify, or edit the specified folder or window.

NOTE: For Reports Access, you can only select either Full Access or No Access. There is no Read Only Access for reports.

Upon upgrade to Propel Rx, all users have the same permissions and access they had prior to the upgrade. Any new users added after the Propel Rx upgrade have permissions based on their Role Type. User access for specific Role Types can be seen in the **Role Types** tab of the **Security Administration Facility** window. The Role Types in Propel Rx are mapped to the same Role Types on the EHR:

- Pharmacist = Pharmacist
- Relief Pharmacist = Relief Pharmacist
- Pharmacy Manager = Pharmacy Manager
- Pharmacy Student = Pharmacy Student
- Pharmacy Technician = Pharmacy Technician

- Pharmacy Assistant = Pharmacy Assistant

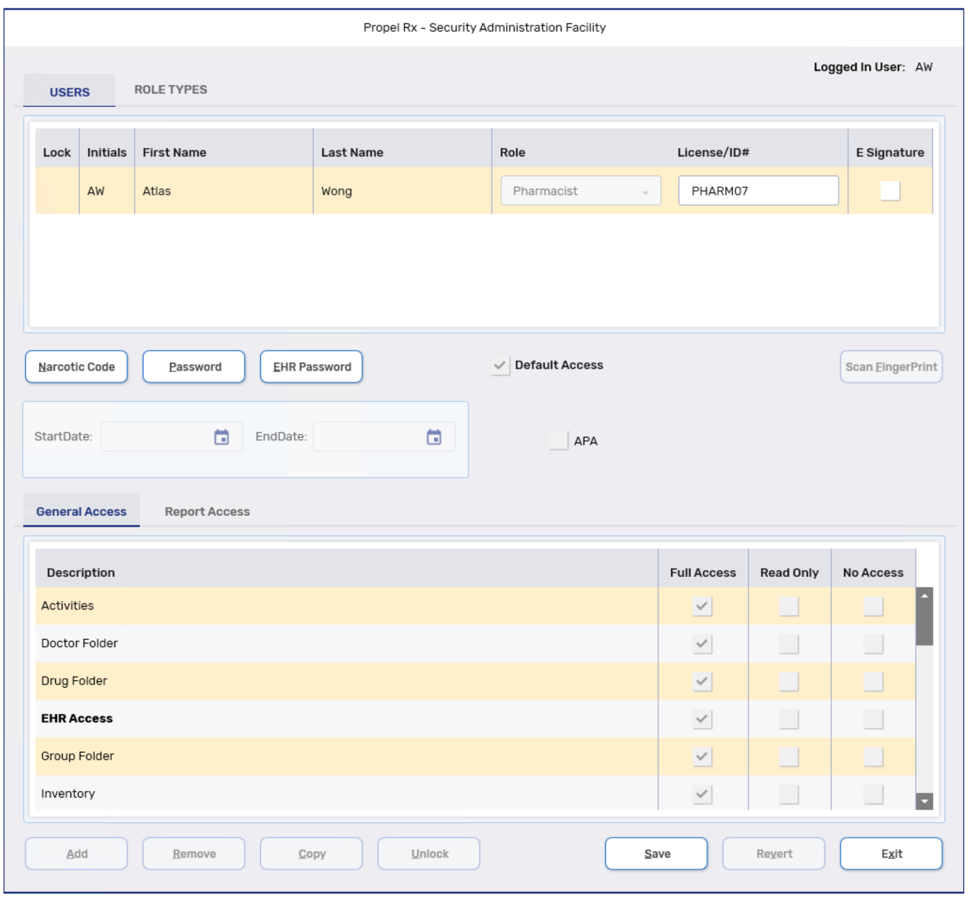
Accountant and Inventory Clerk Role Types do not have EHR access in Propel Rx and therefore, they are not mapped to any EHR Role Type.

In addition to Propel Rx permissions, Alberta Health sets EHR permissions that dictate whether a user can perform certain actions on the EHR. Rejections will be returned by the EHR if an action is attempted for which the user does not have permission.

Accessing the Security Window

To access the Security Administration Facility window:

1. Select **More** (**...**) > **Security**. The Security Login window opens.
2. Enter your Propel Rx password.
3. Select **OK**. The Security Administration Facility window opens.



NOTE: A user must have Full Access to the Security Folder to manage all user accounts. The ADM user can assign this privilege to other users within Propel Rx.

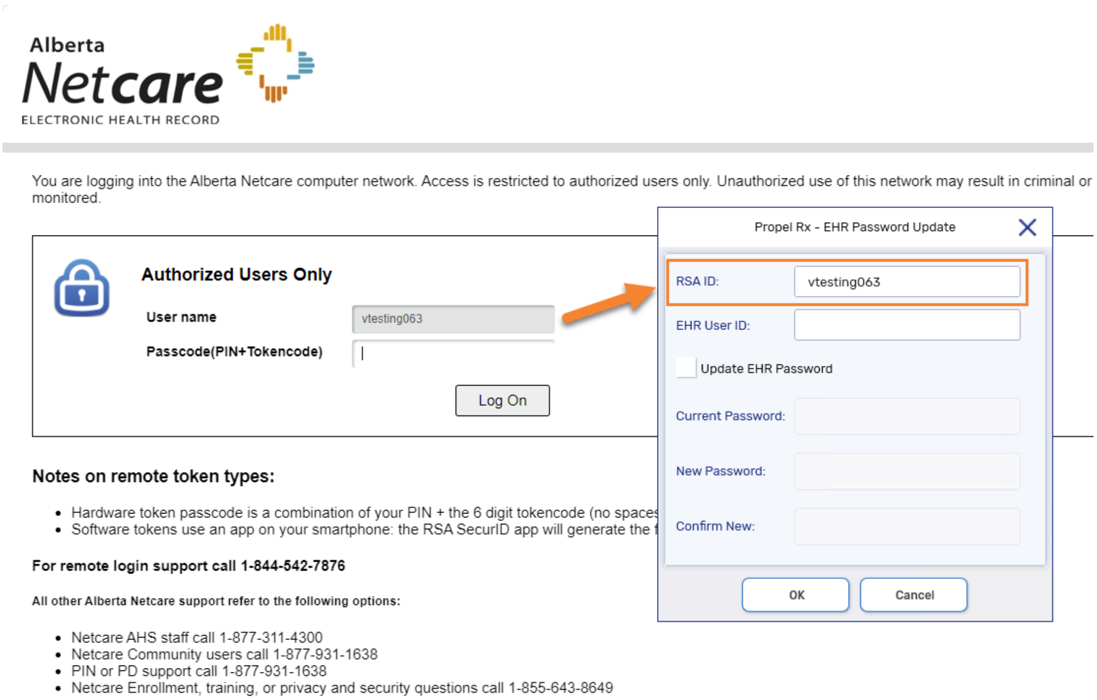
Setting Up Users With EHR Access

All Propel Rx users who should have access to view or update information on the EHR should be given credentials by Alberta Health. These credentials can be entered in Propel Rx to grant access to the EHR. If you are not set up with EHR access, EHR buttons and checkboxes will either be disabled in Propel Rx, or you will get a validation that access is required upon selecting them.

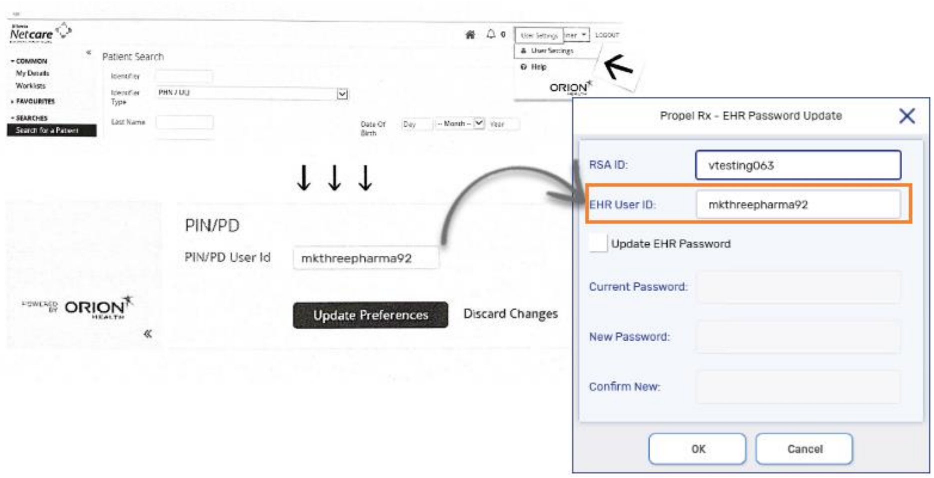
EHR access cannot be set up for ADM, Accountants, or Inventory Clerks.

To set up EHR access for your user account:

1. Log into Propel Rx using your username and password.
2. Select **More** (...) > **Security**. The Security Login window opens.
3. Log in using your Propel Rx password. The Security Administration Facility window opens.
4. Select **EHR Password**. The EHR Password Update window opens.
5. Enter information in the **RSA ID** and **EHR User ID** fields. For some users, the RSA ID and EHR User ID will be the same. For others, they will be different.
    - **RSA ID** – enter the RSA username that you use to log into the Alberta Netcare network as shown below.



    - **EHR User ID** – your EHR User ID can be found in one of two ways:
        - Log into the Alberta Netcare Portal and select **My Details** on the left OR **User Settings** at the top. Scroll to the bottom of the page and locate your **PIN/PD User Id**. This will be your EHR User ID.



- The pharmacy licensee can provide the EHR User ID from the **ANP End User report** generated on AHS IAM. Instructions on how to generate this report is provided to the licensee by Alberta Health prior to RTI activation.

6. You do NOT have to update your EHR password in Propel Rx to be granted EHR access. Select **OK**.
7. Select **Save**.
8. Select **Exit**. A prompt reminds you to log out and back in on all computers to apply the changes.
9. Select **OK** to close the Security window.

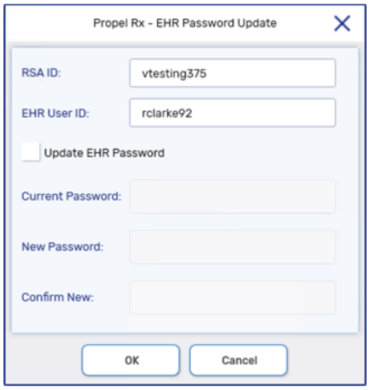
Changing the EHR Password

You only change your own EHR Password; the ADM or Pharmacy Manager user cannot change another user's EHR Password.

Minimum password requirements are enforced by the EHR. If your password does not meet these requirements, a validation error will appear upon selecting OK.

To update your EHR Password:

1. Select **More (...)** > **Security**. The Security Login window opens.
2. Log in with your Propel Rx password. The Security Administration Facility window opens.
3. If more than one user is listed at the top, select your user account.
4. Select **EHR Password**. The EHR Password Update window opens.
5. Select the **Update EHR Password** checkbox.
6. Enter your current EHR password in the **Current Password** field.
7. Enter a new password in the **New Password** and **Confirm New** fields.
8. Select **OK**.
9. Select **Save**.

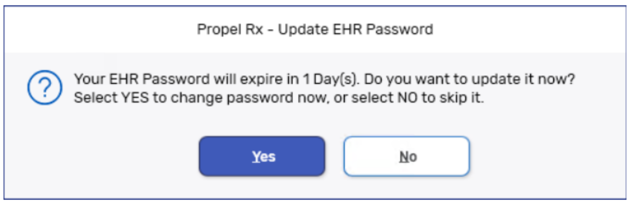


Changing a User's Expiring/Expired EHR Password

Your EHR Password expires periodically as determined by the EHR. When the EHR Password is within 7 days of expiry, a prompt appears upon logging into Propel Rx. You have the option to change the password or skip it for now. If the EHR Password expires, you will be forced to update your password in the prompt.

To change an expiring/expired EHR Password:

1. Log into Propel Rx and the EHR. If your password is within 7 days of expiry, a prompt appears with the option to update the EHR Password.



2. Select **Yes**. The EHR Password Update window opens.
3. Enter the following information:
    - **Current Password**
    - **New Password**
    - **Confirm New**
4. Select **OK**.

Adding New Propel Rx Users

When adding new users, it is imperative that all user credentials are updated to reflect their Role Type and licensing ID. The ADM user cannot be used to process claims.

To add a new user:

1. Log into Propel Rx as the Administrator (User Name = ADM) or Pharmacy Manager.
    - If logged in as the Pharmacy Manager, select **More** (...) > **Security**. Enter your Propel Rx password to open the Security Administration Facility window.
2. Select **Add**. The Add User window opens.
3. Enter the following information for the new user.
    - Initials
    - First Name
    - Last Name
    - Role Type
    - License/ID # (if applicable)
    - New Password (this is a temporary password for Propel Rx which is reset on the first login)
4. Select **OK**.
5. Select **Save**.

6. Select **Exit** to return to the login window.
    - If logged in as the Pharmacy Manager, log off Propel Rx.
7. Have the new user that was just created log in using the temporary password created above.
8. Upon login, the user is prompted to change their Propel Rx password. Select **OK** to open the Change Password window.
9. Have the new user, enter a new password.
10. Select **OK**.

The steps outlined above adds the user to Propel Rx but does not configure the user for EHR access. Follow the steps in Setting Up Users for EHR Access if the user requires EHR access.

EHR Audit Logging

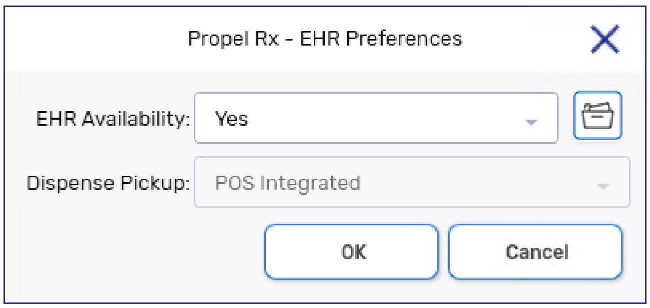
A user's interactions with the EHR in Propel Rx are logged in the backend and can be retrieved at the request of Alberta Health. Information is kept for a period of 10 years starting from the date the event occurred. **If Alberta Health requires that your store provide audit data, please submit a request to Customer Care for this information.**

Setting EHR Preferences

The EHR Preferences define various aspects of EHR processing.

Overview of EHR Preferences

To access EHR Preferences, select **More** (...) > **Alberta** > **EHR Preferences**.



What is the EHR Preference?	What is it used for?
EHR Availability	When the connection to the EHR is lost, or the Network is down for an extended period, the EHR Availability can be set to No. This automatically places EHR transactions in the EHR Queue for later processing. An audit trail is created each time this preference is modified.
Dispense Pickup	Determines the type of Dispense Pickup that occurs. For POS integrated stores, the only option is POS integration. For non-POS stores, this can be set to Dispense or Manual. • **POS Integration**: Dispense Pickup is transmitted when the prescription sale is scanned at the POS. • **Dispense**: Dispense Pickup is transmitted when the prescription completes the last step of Workflow. • **Manual**: Dispense Pickup is transmitted when the Workflow status is changed from the Pick Up/Delivery tile or Rx Detail EHR tab. The Pickup message can only be transmitted after the prescription completes the last step of Workflow.

Viewing EHR Availability History

When the EHR Availability is changed, the following information is recorded in Propel Rx:

- Date the change was made.
- The setting that the EHR Availability was changed to (i.e., Yes or No).
- User who made the change.
- Reason for the change.

To view the EHR Availability change history:

1. Select **More** (...) > **Alberta** > **EHR Preferences**. The EHR Preferences window opens.
2. Select the folder button located beside the **EHR Availability** field. The EHR Availability History window opens.

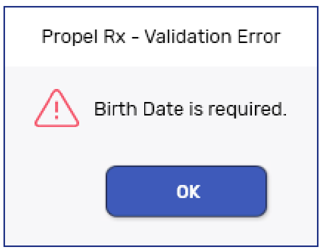
3. Once you are done viewing the change history, select **OK**.

Pharmacy Preferences

Required Patient Fields

This section is only applicable to Independent stores.

In Pharmacy Preferences, you can set required demographic fields for a Patient Folder. When a Patient Folder is saved, Propel Rx validates for missing data and prompts you if required fields are not completed.



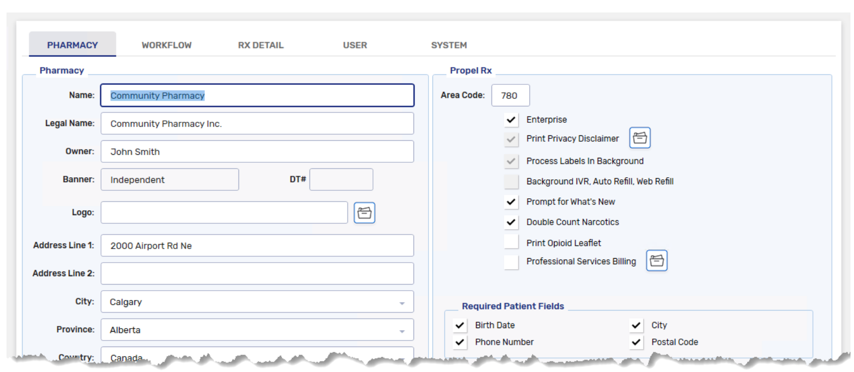
To ensure Patient Folders are complete, select the **Birth Date** checkbox in **More** (...) > **Pharmacy** > **Required Patient Fields**. When messages are sent to the EHR, the birth date, name, gender, and PHN are used to validate the patient.

The following fields are optional but recommended:

- Phone Number
- City
- Postal Code

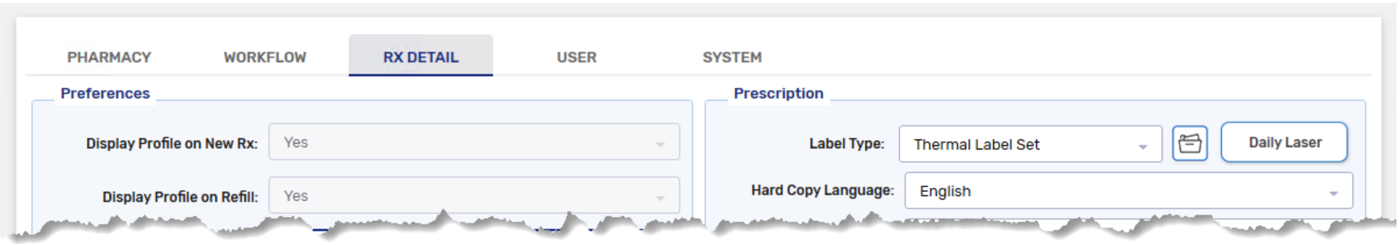
Background IVR, Auto Refill, Web Refill

With EHR integration, the Patient Medication Profile must be viewed prior to clinical interactions such as dispensing a prescription. As a result, the **Background IVR, Auto Refill, Web Refill** preference is turned OFF and disabled. For synchronized patients, the **Background** button in the Rx menu is also disabled.



Display Profile on New Rx or Refill

With EHR integration, the **Display Profile on New Rx** and **Display Profile on Refill** preferences in **More** (...) > **Pharmacy** > **Rx Detail** are set to Yes and disabled. For synchronized patients, the EHR Patient Medication Profile will be displayed during prescription processing if it wasn't viewed in the past 2 hours. For unsynchronized patients, the local Profile will be displayed during prescription processing. These preferences were configured to comply with provincial requirements.



Searching for and Synchronizing a Patient

If a patient is new to your pharmacy and they do not have a local Patient Folder in Propel Rx, you can search the EHR for them. If the patient exists on the EHR, you can leverage the demographic information on the EHR to easily create a new Patient Folder locally. If, however, you create the Patient Folder manually, you can still synchronize it to the EHR later.

ALERT: Do not synchronize test patients or submit test data to the EHR. If a test patient needs to be created, use the applicable Patient Statuses that do not require synchronization to the EHR (e.g., Animal, Doctor Office, Pharmacy).

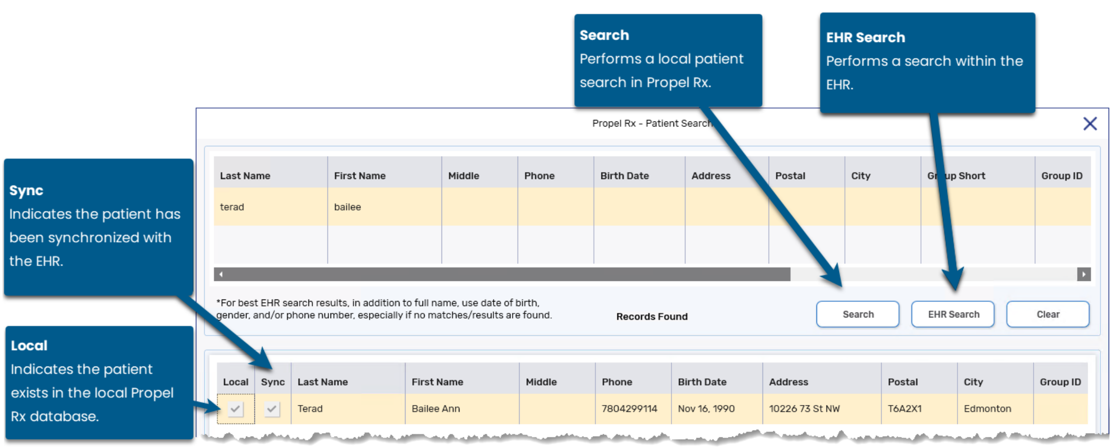
Patient Search Window

With EHR integration, you have 2 search options when searching for a patient: a local search or an EHR search. In the Patient Search window:

- The **Search** button completes a local search within Propel Rx. Only local data will be returned in the search results. This is the default search that's performed when the Enter key is pressed in the Search window.
- The **EHR Search** button performs a search within the EHR. Only EHR data will be returned in the search results. Up to 20 results can be displayed, sorted in descending order by Score. If more than 20 results are returned, a prompt indicates more records were found than displayed.

When EHR integrated pharmacies try to search for a patient, there are 3 possible scenarios they may encounter. For each scenario, it is important to ensure that the Patient Folder is synchronized with the patient information on the EHR. For more information, see Synchronization.

From the Patient Search window, users can identify which patients are local, synchronized, or neither, by reviewing the **Local** and **Sync** checkboxes. The sample patient below is a local patient that has been synchronized with the EHR.



Search Criteria

When searching for a patient, it is ideal to use the patient's primary Provincial Health Number (PHN). If the patient does not know their PHN, perform a combined search using as much demographic information as possible to yield more accurate results. A local search within Propel Rx can be done using any search criteria, as per existing functionality. An EHR search must contain one of the following search combinations:

- Primary PHN

  ALERT: Secondary PHN searches are not permitted. If you search using a secondary PHN, a Detected Issue will appear.

- Last Name and First Name

  ALERT: Partial name searches are not recommended as they yield less accurate results.

- Last Name and Middle Name
- Last Name and Date of Birth

  TIP: The Birth Date can be entered in multiple formats so long as the month is followed by the day and then by the year. For example, November 16, 1990, can be entered as Nov 16, 1990, 11-16-1990, or 11/16/1990.

You can enter the gender, address, postal code, or home telephone number (minimum 7 digits) in addition to the minimum requirements outlined above in the search window.

Wildcard characters are not accepted (e.g., * % $) for EHR searches. Wildcards may be used for local searches.

If an EHR Search is performed, additional columns are visible in the search results grid that cannot be seen with a local search:

- **Score** – assigned by the EHR to measure how closely the search criteria matches the results. A higher score indicates a closer match.
- **Effective Date** – the date that the patient became eligible to receive Health Care insurance provider benefits.
- **Mobile** – patient's mobile phone number.
- **Secondary PHN** – lists all the patient's secondary PHNs. These PHNs are not stored in Propel Rx.

TIP: You can rearrange the columns in the search window by clicking on a column, holding it, and then dragging it to the preferred location.

Punctation

For all NAME fields, the only punctuation that is accepted when searching for an EHR patient record are listed below. All other punctuation, including quotation marks ("), asterisks (*), or forward slashes (/) are not permitted to be used.

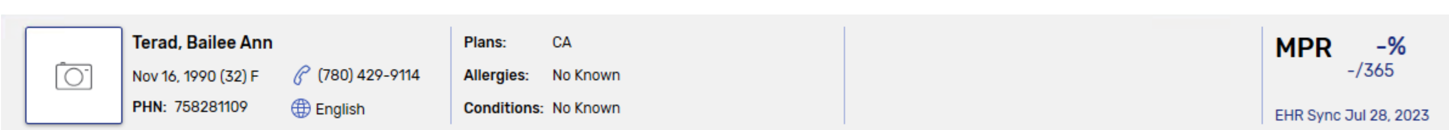
Punctuation	Description
Hyphen [-]	When used in a combined name where appropriate. Example: MARY-ANN or COTTON-WILLIAMS
Apostrophe [']	Where appropriate. Example: O'REILLY
Period [.]	Where it is part of the name field. Example: ST. CLARE
Space [ ]	Where it is part of the name field. Example: TERRI ANN

Synchronization

For any interaction to occur with the EHR, a patient's information in Propel Rx must be synchronized with the EHR. Synchronization ensures that the correct patient is selected and allows their clinical and prescription information to be updated on the EHR. For information on how to synchronize a patient, see Synchronization Scenarios.

In the top right section of the Patient Folder Main tab, below the patient's MPR, is an indication of the Patient Folder's synchronization status with the EHR.

- If the Patient Folder is not yet synchronized, it displays **EHR Not Sync'd**.
- If the Patient Folder has been synchronized, it displays **EHR Sync MMM DD, YYYY**.
- If the Patient Folder is flagged as Facility, it displays **Facility Patient**.
- If the last comparison between the Patient Folder and EHR occurred over a year ago, the EHR Sync indicator displays in red, and a warning indicator appears beside the **Compare** button. Once a Compare is completed, the EHR Sync indicator turns back to blue.



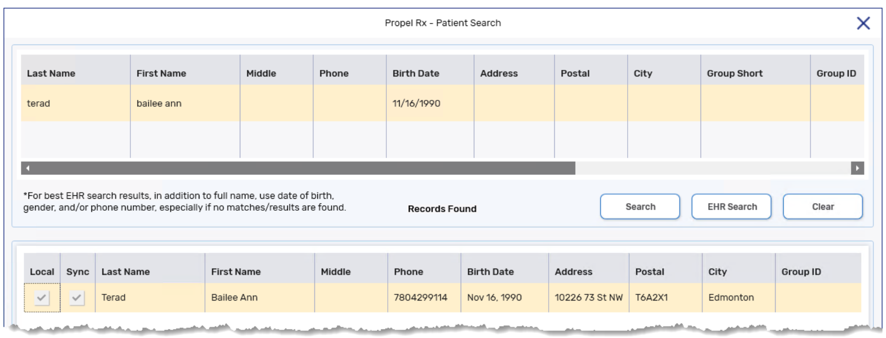
Synchronization Scenarios

Scenario 1: Existing Propel Rx Patient/Existing EHR Patient

You will encounter this scenario if the patient is an existing customer at your pharmacy and exists on the EHR.

1. Select the **Patient** button on the left navigation menu.
2. Enter the search criteria for the patient.
3. Select **Search**. The search results display matching local results.
4. Highlight the local patient record.

NOTE: If you can't find the record using a local search, perform an EHR Search. If you select a record from an EHR Search that's both local and synced, the local Patient Folder will open (i.e., a new Patient Folder will not be created).



5. Select **OK**. The Patient Folder opens.
6. On the Main tab, select the expander button beside the **PHN** field. The Patient Search – Client Registry window opens with the local patient information pre-populated as the search criteria.
7. Highlight the matching result that displays.
8. Select **Compare**. The Patient Comparison window opens displaying the Local (Propel Rx) patient information and the EHR information.
9. If required, information from the EHR can be saved locally by highlighting the applicable field(s) and selecting **Copy**. For more information on updating patient information from the EHR, see Patient Compare. Once information is copied over, a checkmark appears beside the field on the left.

   NOTE: A warning indicator displays beside the field on the left if there's a difference between the left (Propel Rx) and right (EHR) sides.

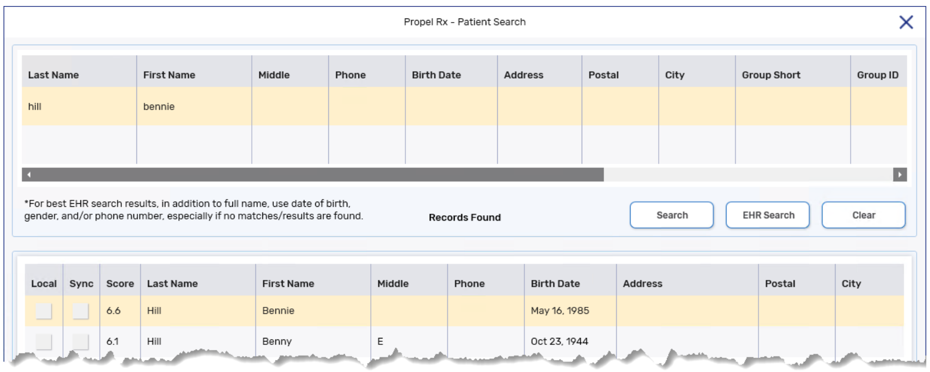
10. Select **Update**.
11. Select **Save**.

Propel Rx synchronizes the local record. The Patient Folder information bar is updated to indicate the Patient Folder was synced to the EHR and the date it occurred.

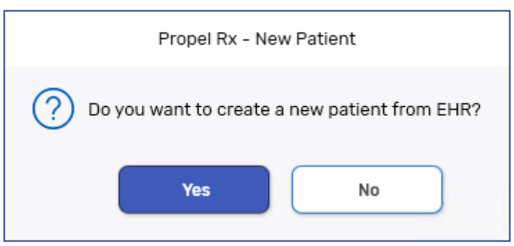
Scenario 2: New Propel Rx Patient/Existing EHR Patient

You will encounter this scenario if this is the first time the patient has come to your pharmacy, but not the first time they have received health care treatment in Alberta. This scenario will be used for a patient that exists in the EHR.

1. Select the **Patient** button on the left navigation menu.
2. Enter the search criteria for the patient.
3. Select **Search**. The search results indicate *No Records Found* or no matching records.
4. Select **EHR Search**. The search results display an existing EHR record.
5. Highlight the EHR patient record.



6. Select **OK**. A prompt asks if you want to create a new patient from the EHR.

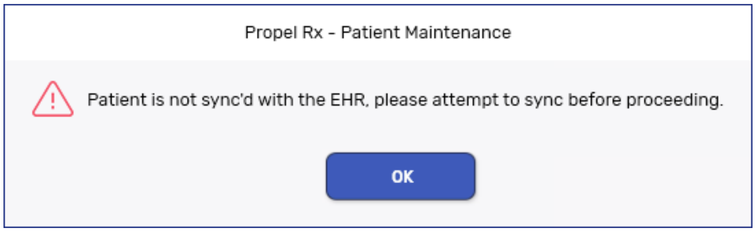


7. Select **Yes**. The Patient Folder is populated with the demographic information from the EHR.
8. If required, update any information in the Patient Folder.
9. Select **Save**.

The Patient Folder is saved locally. The Patient Folder information bar is updated to indicate the Patient Folder was synced to the EHR and the date it occurred.

Scenario 3: Non-EHR Patient

When a patient exists on the EHR, it is expected that you synchronize their Patient Folder in Propel Rx. In some situations, a patient may not exist on the EHR (e.g., out of province) and you will be unable to sync. When this occurs, you can still perform actions with the Patient Folder, but a prompt will appear once per patient per day alerting you to sync.



The above prompt will appear when an interaction is initiated with the EHR. To proceed, you must complete a sync attempt.

1. If the patient does not exist in Propel Rx, manually create a new Patient Folder for them. If the patient already exists locally, skip to step 2.
2. In the Patient Folder Main tab, select the expander button beside the **PHN** field. This action qualifies as a sync attempt. The Patient Search – Client Registry window opens with the local patient information pre-populated as the search criteria.
3. If the patient does not exist on the EHR, the appropriate record will not be found in the results. Select **Cancel**.

If you attempted to sync the patient but it was unsuccessful, the prompt will not appear again for that patient till the next day. Any data will bypass EHR while the patient remains unsynced.

NOTE: This section does not apply to patients that have an Animal, Doctor Office, Pharmacy, or Caregiver status. For more information, see Patient Status.

Unsyncing and Resyncing a Patient

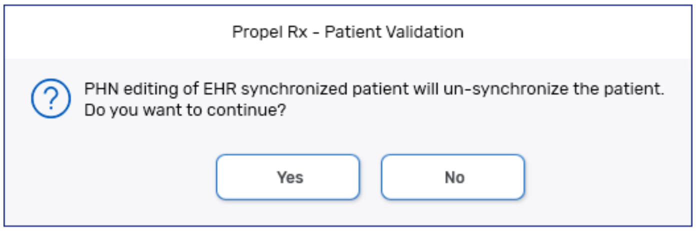
A patient's EHR Profile associated with their secondary PHN is read-only; any actions that require transmission to the EHR will not be permitted with the secondary PHN.

While you cannot initially sync a patient with their secondary PHN, there may be situations where a patient's primary PHN is changed after you synced them in Propel Rx. In these situations, you must resync the patient with their new primary PHN.

NOTE: If data was transmitted while the patient was synchronized to their secondary PHN, you may receive rejections from the EHR if you try to update this data after resyncing.

To unsync and resync a Patient Folder:

1. Open the Patient Folder.
2. Enter the patient's primary PHN in the **PHN** field.
3. Select **Save**. A prompt asks if you want to proceed with unsyncing the patient.



4. Select **Yes**. The PHN expander button will become enabled.
5. Select the **PHN Expander** button. The Patient Search – Client Registry window opens with the local patient information pre-populated as the search criteria.
6. Highlight the matching result that displays.
7. Select **Compare**. The Patient Comparison window opens displaying the Local (Propel Rx) patient information and the EHR information.
8. If required, information from the EHR can be saved locally by highlighting the applicable field(s) and selecting **Copy**. For more information on updating patient information from the EHR, see Patient Compare. Once information is copied over, a checkmark appears beside the field on the left.

   NOTE: A warning indicator displays beside the row on the left if there's a difference between the left (Propel Rx) and right (EHR) sides.

9. Select **Update**.
10. Select **Save**.

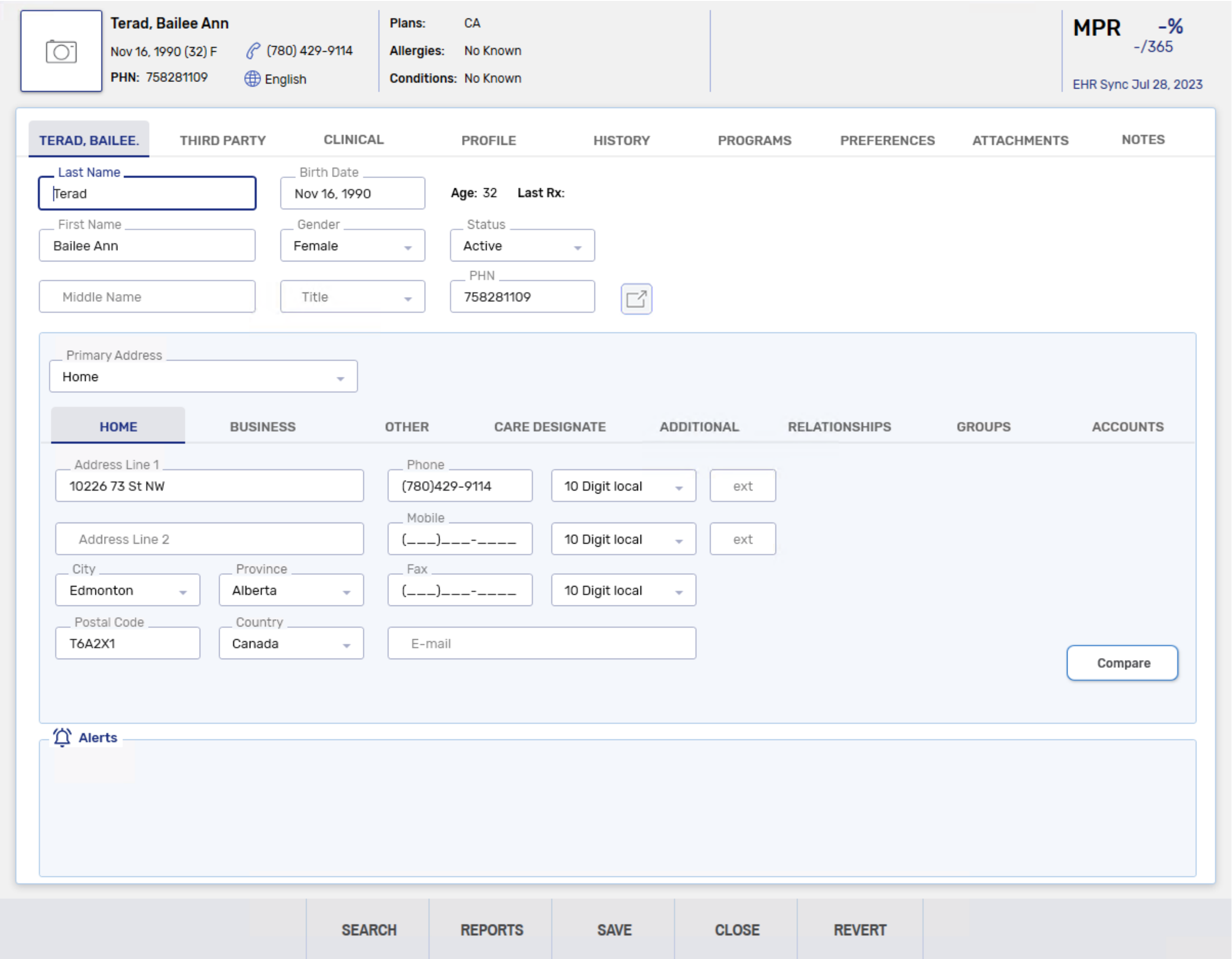
Propel Rx synchronizes the local record. The Patient Folder information bar is updated to indicate the Patient Folder was synced to the EHR and the new date it occurred.

Patient Folder

Main Tab

Synchronization

An EHR Sync indicator displays on the information bar at the top of the Patient Folder. For more information on the different indicators, click here.

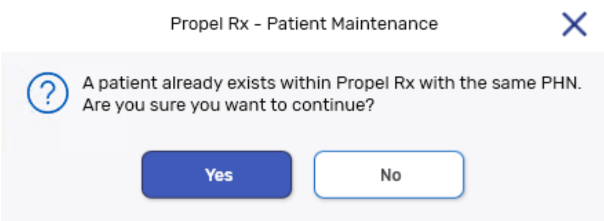
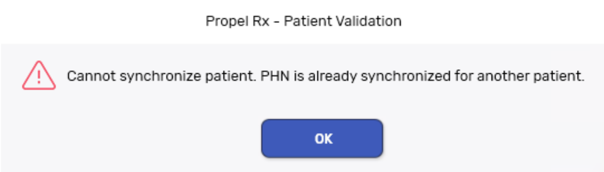
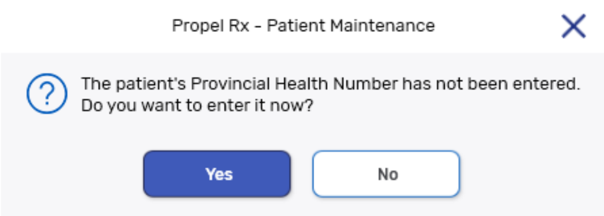
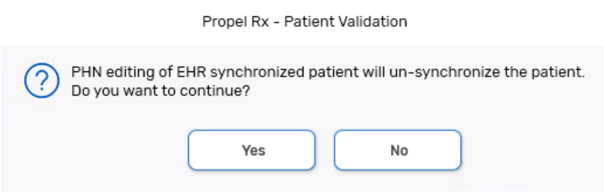


Once the patient has been synchronized, the PHN expander button is disabled. You can select **Compare** to validate the local information with the EHR if needed.

PHN

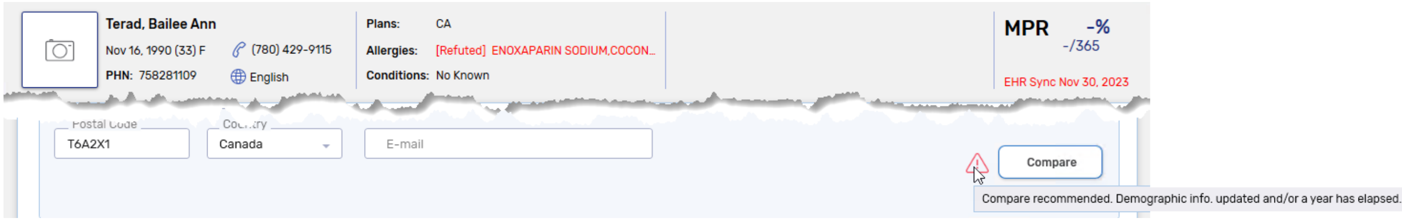
The PHN is a unique identification number assigned to a resident of a province.

Validations are performed when a PHN is entered in the Patient Folder. These validations will not appear for Animal patients. Refer to the table below for more information.

PHN Validation	Description
	If the PHN field is populated with a PHN that already exists for another patient in Propel Rx, this validation appears upon selecting **Save**. You can still save the Patient Folder; however, a sync will not be permitted with that PHN.
	If you try to sync a patient with a PHN that's already been synced with another patient, this validation appears. You cannot use the same PHN to sync two patients.
	If the PHN field is left blank, this prompt appears upon selecting **Save**. This prompt only appears once. Upon making your selection, this prompt no longer appears for all future encounters with this Patient Folder.
	If you edit or remove the PHN from the Patient Folder, upon selecting **Save**, this validation appears. If you select Yes, the patient will no longer be synced, and the synchronization process will need to be repeated. For more information, see Unsyncing and Resyncing a Patient.

Patient Compare

When information is updated in the Patient Folder in Propel Rx, a warning indicator appears beside the **Compare** button, and the **EHR Sync** indicator at the top turns red. This serves as a visual cue for you to validate the patient's information against the EHR. Once the Patient Folder is saved, the warning indicator will be removed, and the EHR Sync indicator will revert to normal. These visual cues also appear if the last EHR sync took place over a year ago.

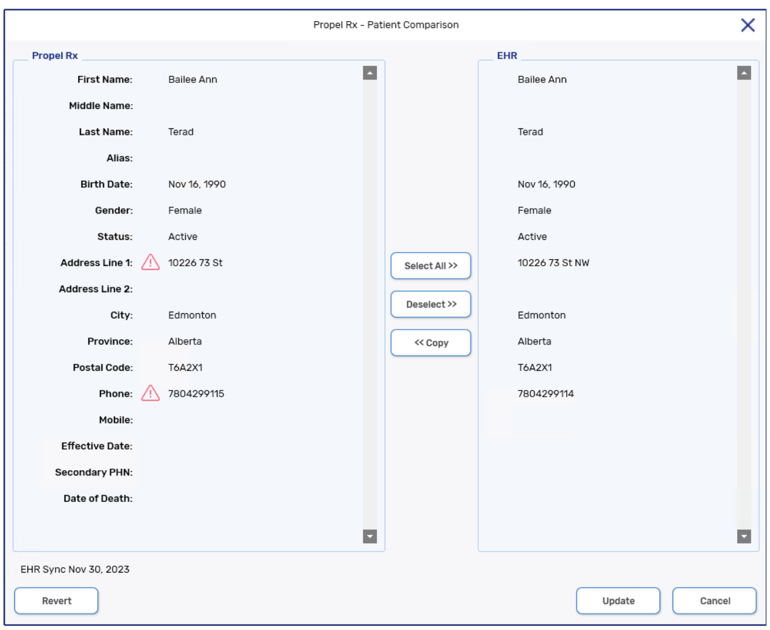


The Compare button allows you to validate the patient demographic information in Propel Rx with the EHR. If any of the information does not match, or something is missing, you can apply EHR information locally into Propel Rx at any time. The converse cannot be done; information from Propel Rx cannot be applied to the EHR.

To compare the Patient Folder with the EHR:

1. In the Patient Folder Main tab, do one of the following:
   - If the patient is synchronized, select the **Compare** button located at the bottom.
   - If the patient is unsynchronized, select the expander button beside the **PHN** field. A search in the EHR is performed. If a search result is returned that matches the patient, highlight the record, and then select **Compare**.

   The Patient Comparison window opens displaying the local (Propel Rx) patient information and the EHR information.



2. Review the information on the EHR side. If there are any differences between the left (Propel Rx) and right (EHR) sides, a warning indicator appears beside the field on the left. Mismatches are not case sensitive.

NOTE: If information on the EHR is out of date, the patient must contact Alberta Health to correct it. Pharmacies cannot update patient demographic information on the EHR.

3. If you want to copy patient information from the EHR to Propel Rx, do one of the following:
   - Select one or more fields to copy on the EHR side.
   - Select the **Select All** button to highlight all fields on the EHR side.

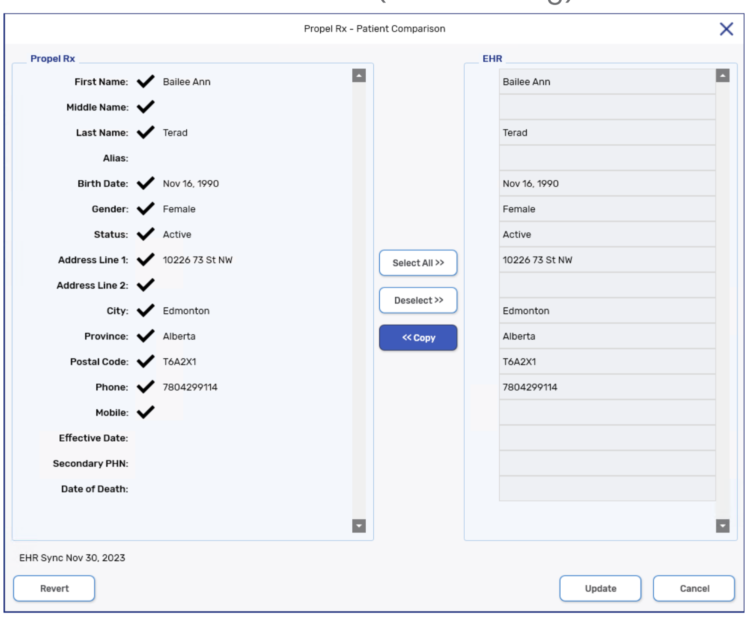
Smarter & Faster

Troubleshooting Detected Issues Due to Mismatched Patient Information

If there's a mismatch between the local patient demographic information and the EHR, Detected Issues may be returned when performing actions that involve EHR transmission. If this happens, perform a Patient Compare, and update the information in Propel Rx to match the EHR.

4. Select **Copy**. Once information is copied over, a checkmark appears beside the field(s) on the left.

NOTE: The following data cannot be copied over from the EHR, but it can be viewed anytime if needed:
- Alias
- Effective Date
- Secondary PHN
- Date of Death
- Phone (if it's too long)



5. Select **Update**.
6. Select **Save**.

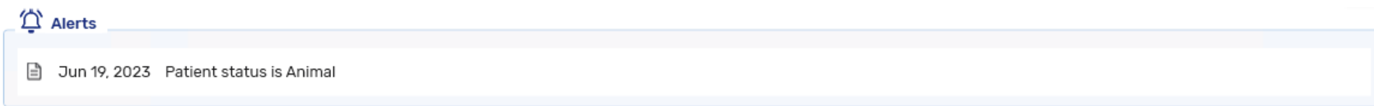
The Patient Folder is updated with the demographic information from the EHR, and a new EHR sync date is displayed.

Patient Status

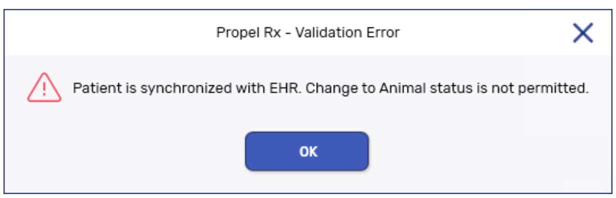
In Alberta, when the patient status is Active, Deceased, Hospitalized, Inactive, Obsolete, or Out of Province:

- PHN is required.
- Messages transmit to the EHR.
- EHR buttons are enabled.

Animal, Doctor Office, Pharmacy, Caregiver, and Facility patients are not associated with EHR functionality; these patients are not synced to the EHR. When dispensing a prescription for these patients, an Alert displays in Rx Detail to ensure the dispensing user is aware of the patient status.



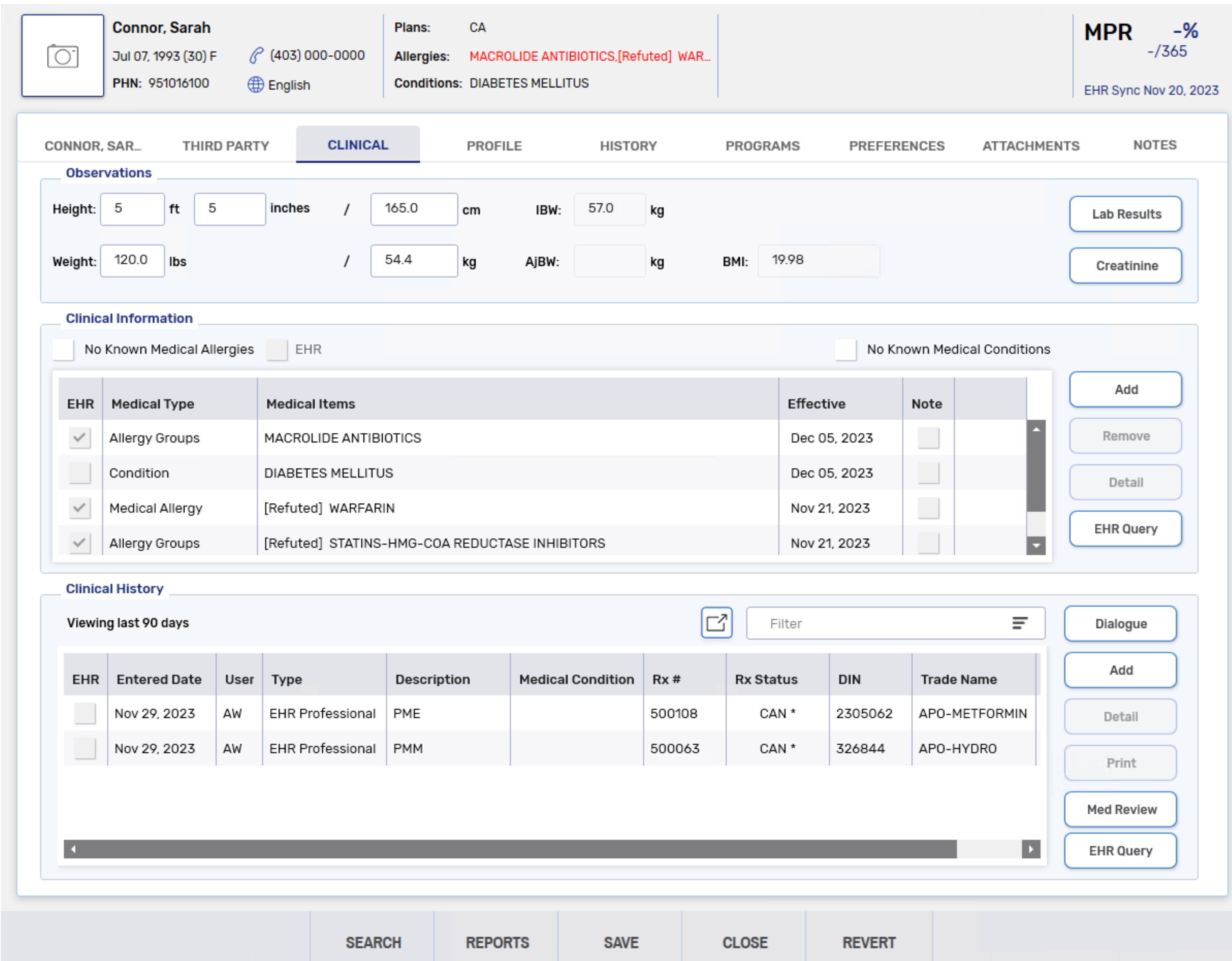
When the patient status is updated, the change is recorded in the Patient Folder History tab. The status of a patient, however, cannot be updated to a non-EHR status if EHR activity exists for that patient. The following validation prompt appears:



ALERT: Do not use non-EHR patient statuses to bypass transmitting prescriptions to the EHR. All prescriptions for real patients must be transmitted to the EHR and any prescriptions that are not may be monitored or audited. Refer to EHR Network is Unavailable for how to manage transactions when the EHR is not available.

Patient Clinical Tab

The Clinical tab contains clinical information and clinical history that can be uploaded to the patient's EHR Profile.



Clinical Information

Allergies and Intolerances can be added from the Clinical Information section and transmitted to the EHR so other healthcare professionals can access this information. If an Allergy or Intolerance is not supported by the EHR, it can still be saved locally. Medical Conditions can only be saved locally.

When an Allergy or Intolerance is added or detailed, the following validations will be performed against the patient's sync status:

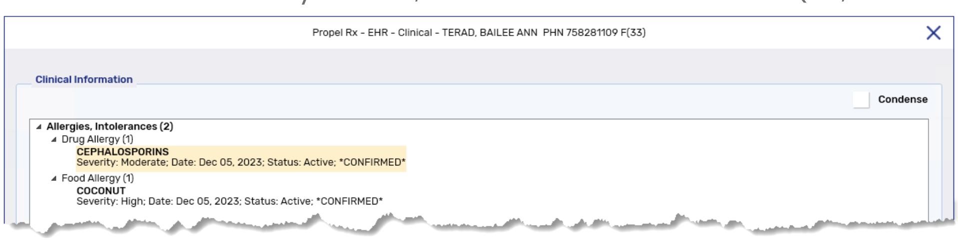
- If the patient is not synced, a prompt will block you from adding or detailing the record until you attempt to sync the patient. To qualify as a sync attempt, at minimum, you must select the PHN expander button in the Patient Folder. If you attempted to sync the patient but it was unsuccessful, the prompt will not appear again for that patient till the next day. If an Allergy or Intolerance is added for an unsynced patient, the EHR checkboxes in the Details window will be unchecked and disabled.
- If the patient is synced with their secondary PHN, a Detected Issue will be returned, and you will be required to resync the patient with their primary PHN to continue.

VIEWING CLINICAL INFORMATION ON THE EHR

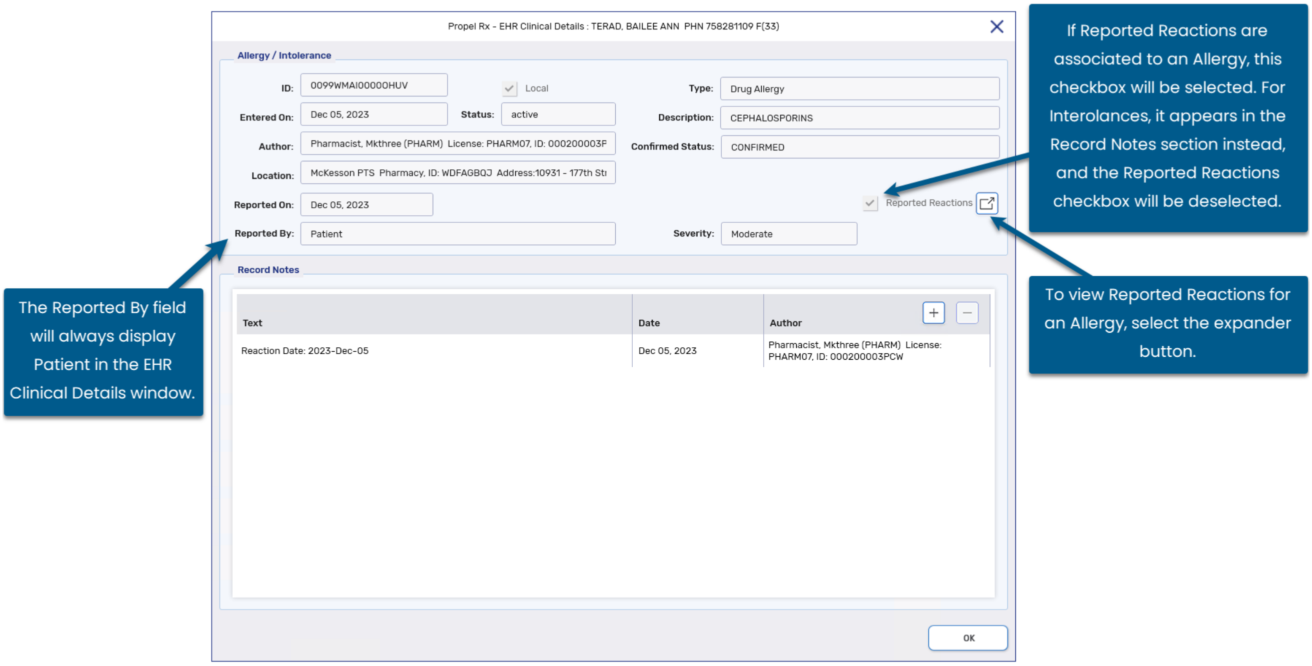
The **EHR Query** button allows you to access the patient's clinical results on their EHR and review what is currently on file to avoid duplicates. There are 2 **EHR Query** buttons in the Clinical tab. The **EHR Query** in the Clinical Information section only returns Allergies and Intolerances. The **EHR Query** in the Clinical History section only returns EHR Professional Services. Local only records are not returned in an EHR Query.

To view clinical information on a patient's EHR:

1. Open the **Patient Folder**.
2. Select the **Clinical** tab.
3. In the **Clinical Information** section, select the **EHR Query** button. The EHR – Clinical window opens.
4. Choose to view in either a condensed or uncondensed mode by selecting/deselecting the **Condense** checkbox. By default, the checkbox is deselected (i.e., default view is uncondensed).

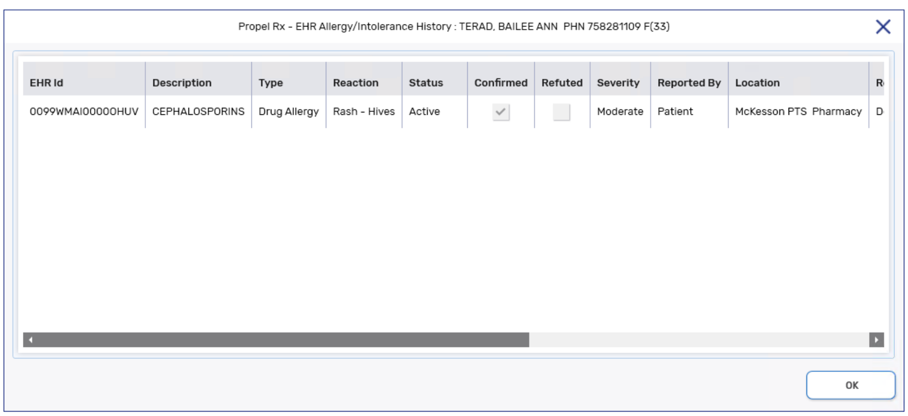


5. Records are sorted with Allergies at the top followed by Intolerances. Underneath the Allergies or Intolerances headings, records are sorted by type and then alphabetically by Allergen/Intolerance. Expand a section to highlight the summary information for one of the documented records. This enables the **Detail** and **History** buttons.
6. To view the details of a record, select **Detail**. The EHR Clinical Details window opens.
7. Select **OK** once you have finished reviewing the clinical details.



8. If you wish to view the history for the record, including when it was added and updates that were made, select **History**.

   NOTE: When a note is added for a record on the EHR, a row will be added to the EHR Allergy/Intolerance History. However, there will be no visible updates to any of the fields in the History window. To view details of the note, refer to the EHR Clinical Details window.



9. Select **OK** once you have finished reviewing the history.

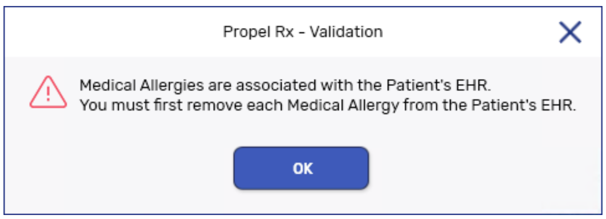
ADDING THE NO KNOWN MEDICAL ALLERGIES STATE TO THE EHR

If a patient has no known medical allergies, you can send this state to the EHR. In Propel Rx, there is one checkbox to indicate that a patient has no known allergies. On the EHR, no known allergies can be specified by the following sub-types:

- Drug Allergy
- Environmental Allergy
- Drug Non-Allergy Intolerance
- Environmental Non-Allergy Intolerance

When the No Known Allergies checkbox is selected in Propel Rx, the state is transmitted to the EHR for all the aforementioned sub-types. Once an Allergy or Intolerance is added for the patient, this state is automatically cancelled in Propel Rx and on the EHR for the applicable sub-type and cannot be transmitted again.

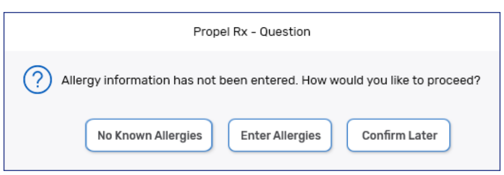
NOTE: If you select the No Known Allergies checkbox and there are Allergies that exist locally, a prompt will appear advising you to remove them from the EHR. Please note, you cannot remove an Allergy from the EHR only; the removal must be initiated from Propel Rx.



To send the No Known Medical Allergies state to the EHR:

1. Open the **Patient Folder**.
2. Select the **Clinical** tab.
3. In the **Clinical Information** section, select the **No Known Medical Allergies** checkbox. By default, the **EHR** checkbox will be selected.

NOTE: For Corporate stores, upon opening a Patient Folder with no Allergy information, a prompt asks if you want to enter this information. If **No Known Allergies** is selected in this prompt, this state will be transmitted to the EHR.



4. Clinical information is recommended to be reviewed at this time. If the Patient Medication Profile wasn't viewed in the last 2 hours, it automatically displays. Select **OK** once you have finished reviewing the EHR Profile.

   NOTE: If the EHR Profile cannot be loaded within 10 seconds, a prompt will appear with the options to bypass the forced view or continue waiting. If **Yes** is selected to the prompt, you can proceed without viewing the Profile

5. Select **Save**.

A processing message displays indicating the information is being transmitted to the EHR. Once the EHR has been updated with the local information, the checkmark in the EHR checkbox is saved, and the User field becomes populated.

If a Detected Issue is returned by the EHR, the EHR checkbox is deselected. The No Known Allergies checkbox will remain selected, but you may deselect it if needed. If the No Known Allergies state is rejected because an Allergy or Intolerance exists on the EHR, perform an EHR Profile Compare to download the record into Propel Rx.

ADDING ALLERGIES OR INTOLERANCES TO THE EHR

For an Allergy or Intolerance to be transmitted to the EHR, the **Type** and **Sub-Type** must be supported by the EHR. The **Type** is chosen in the **Medical Condition Search** window. EHR Types include:

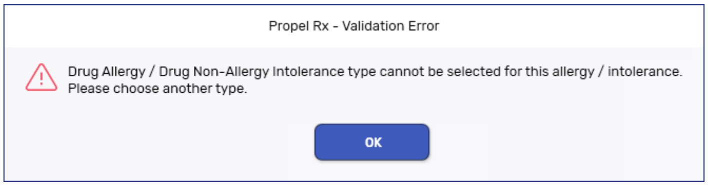
- Allergy Group
- Medical Allergy
- Non-Medical Allergy

The **Sub-Type** is chosen in the **Details** window after a Type is selected. Transmissible Sub-Types are listed with an **EHR** label and include:

- Drug Allergy
- Drug Non-Allergy Intolerance
- Environment Allergy
- Food Allergy
- Environmental Non-Allergy Intolerance
- Food Non-Allergy Intolerance

If the Type and Sub-Type are not supported, the record is only saved locally.

ALERT: For Drug Allergy and Drug Non-Allergy Intolerance Sub-Types, the Allergen must be associated with a valid backend FDB Allergen code. If such a code does not exist for the Type (e.g., custom entry in List Maintenance), a Validation Error will appear upon selecting OK in the Details window. To proceed with adding the Allergy/Intolerance, a different Sub-Type must be chosen.

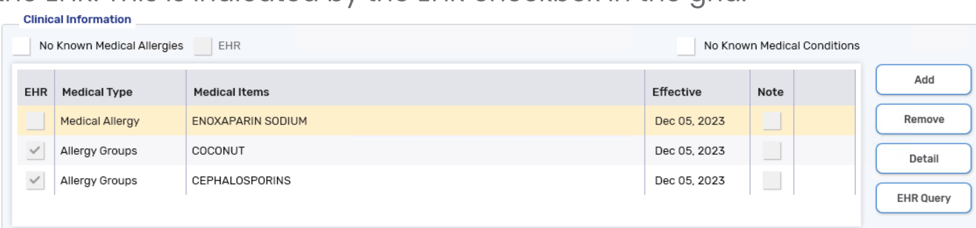


Adding Existing Allergies or Intolerances to the EHR

Existing local only Allergies or Intolerances can be transmitted to the EHR by selecting an acceptable Sub-Type and the EHR checkbox.

To add an existing Allergy or Intolerance to a patient's EHR:

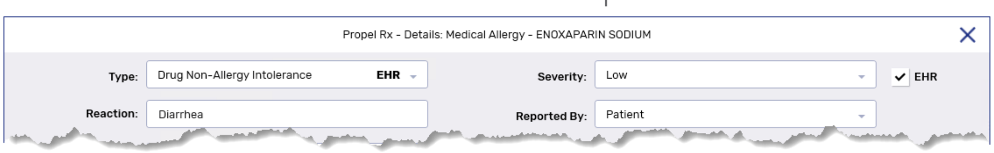
1. Open the **Patient Folder**.
2. Select the **Clinical** tab.
3. In the **Clinical Information** section, highlight the local record that has not yet been uploaded to the EHR. This is indicated by the EHR checkbox in the grid.



4. Select **Detail**.
5. Clinical information is recommended to be reviewed at this time. If the Patient Medication Profile wasn't viewed in the last 2 hours, it automatically displays. Select **OK** once you have finished reviewing the EHR Profile.

   NOTE: If the EHR Profile cannot be loaded within 10 seconds, a prompt will appear with the options to bypass the forced view or continue waiting. If **Yes** is selected to the prompt, you can proceed without viewing the Profile

6. The Details window opens. In the **Type** field, select an **EHR** Sub-Type if not already selected.
7. Ensure the **EHR** checkbox is selected at the top.



8. In the **Reaction** field, do one of the following:
   - If the record is a Drug or Non-Drug Allergy, dropdown the Reaction field and select one of the options. If free-form text was entered prior to EHR integration, it will be retained for your reference, but the text will not be accepted by the EHR. You must select an option from the dropdown to save the record or transmit it to the EHR.
   - If the record is a Drug or Non-Drug Intolerance, enter a free-form description of the reaction in the designated field. This will be transmitted to the EHR as a note.

> **NOTE:** A reaction note must be transmitted to the EHR. If you attempt to remove the reaction note, it will be automatically reinstated after the Details window is closed.

9. If Provider is selected in the **Reported By** field, select the folder button to search for and select the appropriate prescriber. This information is only saved locally. On the EHR, the Reported By field will always be reflected as Patient.

   > **NOTE:** Prior to EHR integration, the Reported By field could be populated with Patient, Physician, Pharmacist, or Family Member. Upon EHR integration, Physician and Pharmacist will be mapped to Provider and Family Member to Agent. For Providers, free-form text is not accepted; you must search for and select a Prescriber Folder.

10. If not already completed, dropdown the **Confirmed Status** field and select Confirmed or Suspected.
11. To add a note, select **Add** in the **Notes** section.
    a. Enter the information for the note in the textbox.
    b. Ensure the **EHR** checkbox in the Notes section is selected if you wish to transmit the note to the EHR. By default, the EHR checkbox in the Notes section is selected if the EHR checkbox is selected for the overall record.
    c. For information on the different checkboxes for a note, see Adding Notes to Allergies or Intolerances on the EHR.
12. Select **OK**.
13. Select **Save** in the Patient Folder.

A processing message displays indicating the information is being transmitted to the EHR. Once the EHR has been updated with the local information, the **EHR** column in the Clinical Information section displays a checkmark. If multiple Allergies/Intolerances were entered, they will all get sent upon Save.

If a Detected Issue is returned by the EHR, the record is saved locally but will not be transmitted to the EHR until appropriate action is taken. If the Detected Issue indicates that the Allergy/Intolerance already exists on the EHR, perform an EHR Profile Compare to download the applicable record to Propel Rx if needed.

Adding New Allergies or Intolerances to the EHR

To add a new Allergy or Intolerance to a patient's EHR:

1. Open the **Patient Folder**.
2. Select the **Clinical** tab.
3. In the Clinical Information section, select **Add**.
4. Clinical information is recommended to be reviewed at this time. If the Patient Medication Profile wasn't viewed in the last 2 hours, it automatically displays. Select **OK** once you have finished reviewing the EHR Profile.

NOTE: If the EHR Profile cannot be loaded within 10 seconds, a prompt will appear with the options to bypass the forced view or continue waiting. If **Yes** is selected to the prompt, you can proceed without viewing the Profile

5. The Medical Condition Search window opens. In the **Description** column, enter your search criteria.
6. Select **Search**.
7. From the returned results, select the desired condition and then select **OK**. The Details window opens.
8. Enter the following details:
   - **Type** – the EHR checkbox is selected by default when an EHR Type is chosen. Prior to EHR integration, the Type would default to Allergy. Once EHR is activated, you must choose a Type when adding new Allergies or Intolerances.

     TIP: The Types that can be transmitted to the EHR are indicated with an **EHR** label in the dropdown list.

   - **Effective Date** – cannot be in the future. The **Effective Until** date is not transmitted to the EHR.
   - **Reaction** – select from the dropdown (Allergy) or enter free-form (Intolerance). Free-form reactions are transmitted as notes.

     NOTE: A reaction note must be transmitted to the EHR. If you attempt to remove the reaction note, it will be automatically reinstated after the Details window is closed.

   - **Severity** – some severities are not supported for Allergies versus Intolerances. All severities are visible from the dropdown and unsupported severities can still be used for local only or historical records. If an unsupported severity is chosen and the EHR checkbox is on for the record, you will be prompted to reselect the severity upon selecting OK.
   - **Reported By** – if Provider is selected, search for and select the Prescriber Folder using the folder button .
   - **Confirmed Status**
9. To link a drug to the Allergy or Intolerance, enter the DIN, generic name, or trade name of the drug in the **Drug** section. This information is not transmitted to the EHR.
10. To add notes, select the **Add** button in the **Notes** section.
    a. Enter the information for the note in the textbox.
    b. Ensure the **EHR** checkbox in the Notes section is selected if you wish to transmit the note to the EHR. By default, the EHR checkbox in the Notes section is selected if the EHR checkbox is selected for the overall record.
    c. For information on the different checkboxes for a note, see Adding Notes to Allergies or Intolerances on the EHR.
11. Select **OK**.

12. Select **Save**.

A processing message displays indicating the information is being transmitted to the EHR. Once the EHR has been updated with the local information, the **EHR** column in the Clinical Information section displays a checkmark.

If a Detected Issue is returned by the EHR, the record is saved locally but will not be transmitted to the EHR until appropriate action is taken. If the Detected Issue indicates that the Allergy/Intolerance already exists on the EHR, perform an EHR Profile Compare to download the applicable record to Propel Rx if needed.

ADDING NOTES TO ALLERGIES OR INTOLERANCES ON THE EHR

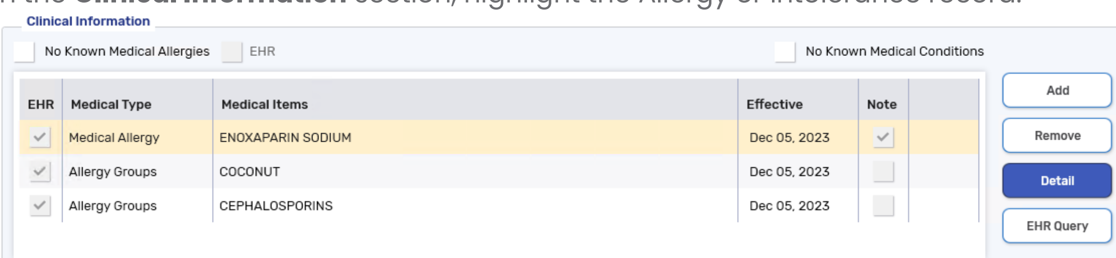
You can add notes to an existing Allergy or Intolerance and transmit them to the EHR if needed. This can be done for records that are saved locally in Propel Rx or only exist on the EHR. Once a note is added, it cannot be removed or edited. If entered in error, enter another note to convey additional information.

NOTE: For Allergy Notes downloaded from the EHR using EHR Profile Compare, the Date field in Propel Rx will reflect when the note was downloaded and not when the note was created.

Adding Notes to the EHR for Local Allergies or Intolerances

To add notes to an existing local Allergy or Intolerance record:

1. Open the **Patient Folder**.
2. Select the **Clinical** tab.
3. In the **Clinical Information** section, highlight the Allergy or Intolerance record.



4. Select **Detail**.
5. Clinical information is recommended to be reviewed at this time. If the Patient Medication Profile wasn't viewed in the last 2 hours, it automatically displays. Select **OK** once you have finished reviewing the EHR Profile.

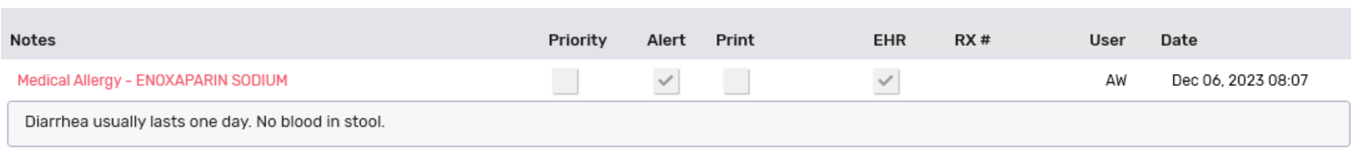
   NOTE: If the EHR Profile cannot be loaded within 10 seconds, a prompt will appear with the options to bypass the forced view or continue waiting. If **Yes** is selected to the prompt, you can proceed without viewing the Profile

6. The Details window opens. In the **Notes** section, select **Add**.
7. Enter information in the Notes textbox.
8. Select the following checkboxes if applicable:

- **Priority** – if you want the note to pop up as an alert when opening the Patient Folder or processing a prescription in Rx Detail. If you already viewed the pop up when opening the Patient Folder, it does not display again in Rx Detail.
- **Alert** – if you want the note to appear in the Rx Detail Alerts section when processing a prescription.
- **Print** – if you want the note to print under the Notes/Alerts section of the Half label or if Digital Workflow is enabled, appear in the Clinical Review Notes tab.
- **EHR** – if you want to transmit the note to the EHR. By default, this checkbox is ON if the Clinical Information record has been transmitted to the EHR.

9. Select **OK**.
10. Select **Save** to transmit the note to the EHR.

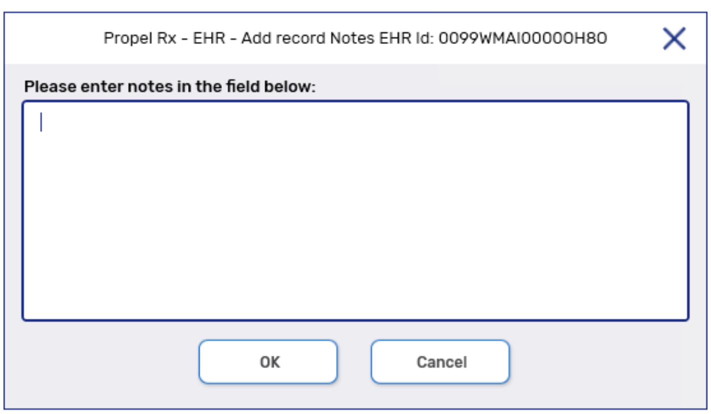
A processing message displays indicating the information is being transmitted to the EHR. The Note checkbox is saved with a checkmark, and the note also displays in the **Patient Folder Notes** tab.



Adding Notes to the EHR for Non-Local Allergies or Intolerances

To add notes to an existing non-local Allergy or Intolerance record:

1. Open the **Patient Folder**.
2. Select the **Clinical** tab.
3. In the **Clinical Information** section, select **EHR Query**. The EHR – Clinical window opens.
4. Select the applicable record.
5. Select **Detail**. The EHR Clinical Details window opens.
6. In the **Record Notes** section, select the **Add** button . The Add record Notes window opens.



7. Enter your note in the textbox.
8. Select **OK**. A processing message appears for the transmission of the note to the EHR. If the transmission was successful, the note appears in the Record Notes section.

9. Select **OK** to close the EHR Clinical Details window.
10. Select **OK** to close the EHR – Clinical window.

UPDATING ALLERGIES OR INTOLERANCES ON THE EHR

After transmitting an Allergy or Intolerance to the EHR, you can update it as needed and these changes will be reflected on the EHR. The only fields that cannot be changed for the record is the Type, Sub-Type (Allergen/Intolerance), and existing notes in the Details window.

Smarter & Faster

Updating the Type and Notes for an Allergy or Intolerance

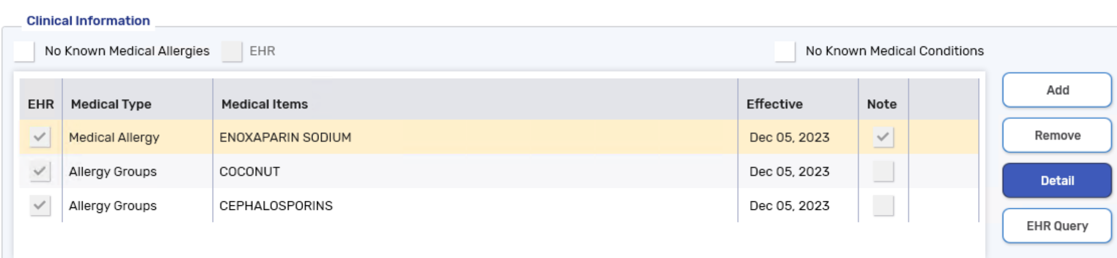
If the Type or Sub-Type (Allergen/Intolerance) needs to be changed for a record that was transmitted to the EHR, refute the Allergy or Intolerance, and transmit a new record to the EHR.

If a note was transmitted to the EHR in error, it cannot be removed or edited. Add another note to convey additional information if needed.

To update an Allergy or Intolerance on the EHR:

1. Open the **Patient Folder**.
2. Select the **Clinical** tab.
3. In the **Clinical Information** section, highlight the Allergy or Intolerance record.

   NOTE: If the record does not exist locally (i.e., transmitted by another pharmacy), you can perform an EHR Profile Compare, download the record into Propel Rx, and proceed to update it.



4. Select **Detail**.
5. Clinical information is recommended to be reviewed at this time. If the Patient Medication Profile wasn't viewed in the last 2 hours, it automatically displays. Select **OK** once you have finished reviewing the EHR Profile.

   NOTE: If the EHR Profile cannot be loaded within 10 seconds, a prompt will appear with the options to bypass the forced view or continue waiting. If **Yes** is selected to the prompt, you can proceed without viewing the Profile

6. The Details window opens. Edit the fields as necessary.

NOTE: For Intolerances, when the **Reactions** field is edited, a new note is sent to the EHR. The existing Reactions note is not edited.

7. Select **OK**.
8. Select **Save**.

A processing message displays indicating the information is being transmitted to the EHR.

If a Detected Issue is returned by the EHR, appropriate action must be taken before the updates are saved locally and on the EHR. If an error is returned that cannot be managed using Issue Management, the updates are reverted.

REMOVING ALLERGIES OR INTOLERANCES

Once Allergies or Intolerances are sent to the EHR, they cannot be removed. You can, however, remove the record locally in Propel Rx. You may choose to do this if these records are no longer applicable, and you want to exclude them from local interaction checking. The records may still be included for EHR interaction checking for a certain period of time.

Smarter & Faster

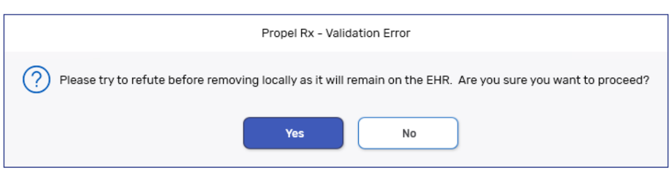
Removing Allergies or Intolerances Locally

If an Allergy or Intolerance is removed locally, you can still re-download it by performing an EHR Profile Compare. Whenever possible, update or refute the Allergy or Intolerance instead of removing it.

To remove an Allergy or Intolerance locally:

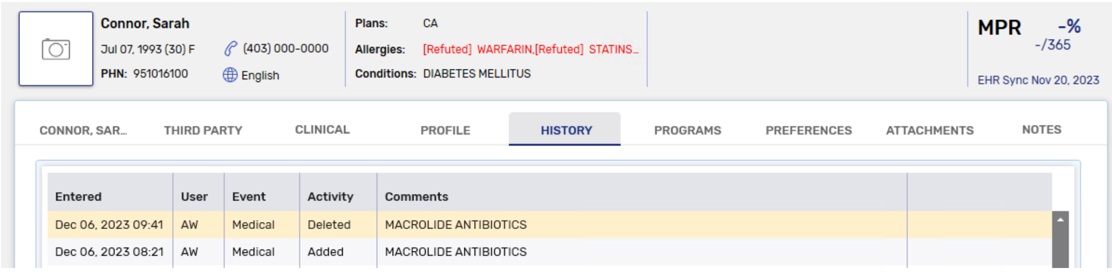
1. Open the **Patient Folder**.
2. Select the **Clinical** tab.
3. In the **Clinical Information** section, highlight the Allergy or Intolerance to be removed.
4. Select **Remove**. If the record was not refuted, a prompt appears advising you to attempt a refute first before a removal.

NOTE: In certain cases, a record cannot be refuted (e.g., the record was created for a previous PHN). However, you can still remove the record in Propel Rx if needed.



5. Select **Yes**.
6. Select **Save**.

The Allergy or Intolerance is removed from the Clinical Information grid and the action is recorded in the Patient Folder History tab.



REFUTING THE NO KNOWN MEDICAL ALLERGIES STATE ON THE EHR

If No Known Medical Allergies was transmitted in error for a patient, it can be refuted. A refute of the No Known Medical Allergies state is not required prior to adding an Allergy or Intolerance. The state will be automatically cancelled once an Allergy or Intolerance is added on the EHR.

ALERT: Only the user who sent the No Known Medical Allergies state can refute it. The user can be identified beside the EHR checkbox.

To refute the No Known Medical Allergies state on the EHR:

1. Open the **Patient Folder**.
2. Select the **Clinical** tab.
3. In the **Clinical Information** section, deselect the **No Known Medical Allergies** or **EHR** checkbox.
4. Select **Save**. A prompt asks you to confirm the action.

5. Select **OK**.

A processing message displays for the refute action. Once successful, the No Known Medical Allergies and EHR checkboxes will be saved with no checkmark. On the EHR, the No Known Allergies state will be removed. The checkboxes can be selected again in the future if no Allergies or Intolerances are added locally or transmitted to the EHR.

If the transmission to the EHR fails, the No Known Medical Allergies and EHR checkboxes will remain selected. It is recommended that you perform an EHR Profile Compare and download records as needed into Propel Rx.

REFUTING ALLERGIES OR INTOLERANCES ON THE EHR

Allergies or Intolerances can be refuted after they are transmitted to the EHR. Once a record is refuted, it cannot be updated unless it's reinstated (i.e., the Refuted checkbox is deselected).

To refute an Allergy or Intolerance on a patient's EHR:

1. Open the **Patient Folder**.
2. Select the **Clinical** tab.
3. In the **Clinical Information** section, highlight the Allergy or Intolerance record.

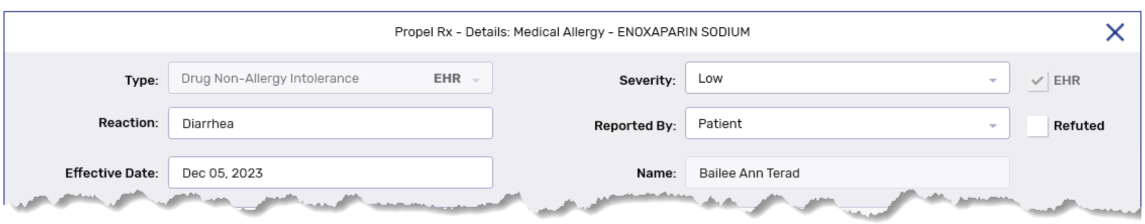
NOTE: If the record does not exist locally (i.e., transmitted by another pharmacy), you can perform an EHR Profile Compare to download the record into Propel Rx.

4. Select **Detail**.
5. Clinical information is recommended to be reviewed at this time. If the Patient Medication Profile wasn't viewed in the last 2 hours, it automatically displays. Select **OK** once you have finished reviewing the EHR Profile.

NOTE: If the EHR Profile cannot be loaded within 10 seconds, a prompt will appear with the options to bypass the forced view or continue waiting. If **Yes** is selected to the prompt, you can proceed without viewing the Profile

6. The Details window opens. Select the **Refuted** checkbox.

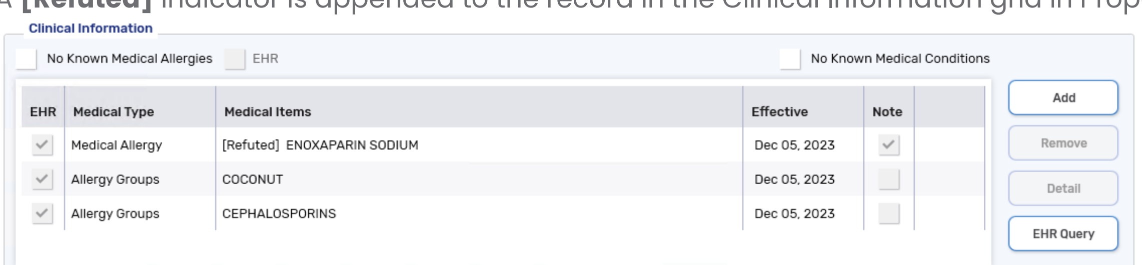
NOTE: The Refuted checkbox is only displayed once the Allergy or Intolerance record has been created and saved.



7. Select **OK**.
8. Select **Save**.

A processing message displays for the refute action. The following updates are made:

- A **[Refuted]** indicator is appended to the record in the Clinical Information grid in Propel Rx.



- When an EHR Query is performed from the Clinical Information section, the record is indicated as ***REFUTED*** in the EHR-Clinical window.

Clinical History

EHR Professional Services can be added from the Clinical History section and transmitted to the EHR.

When an EHR Professional Service is added or detailed, the following validations will be performed against the patient's sync status:

- If the patient is not synced, a prompt will block you from adding or detailing the EHR Professional Service until you attempt to sync the patient. To qualify as a sync attempt, at minimum, you must select the PHN expander button in the Patient Folder. If you attempted to sync the patient but it was unsuccessful, the prompt will not appear again for that patient till the next day. If an EHR Professional Service is added for an unsynced patient, the EHR checkboxes in the Clinical Notes window will be unchecked and disabled.
- If the patient is synced with their secondary PHN, a Detected Issue will be returned, and you will be required to resync the patient with their primary PHN to continue.

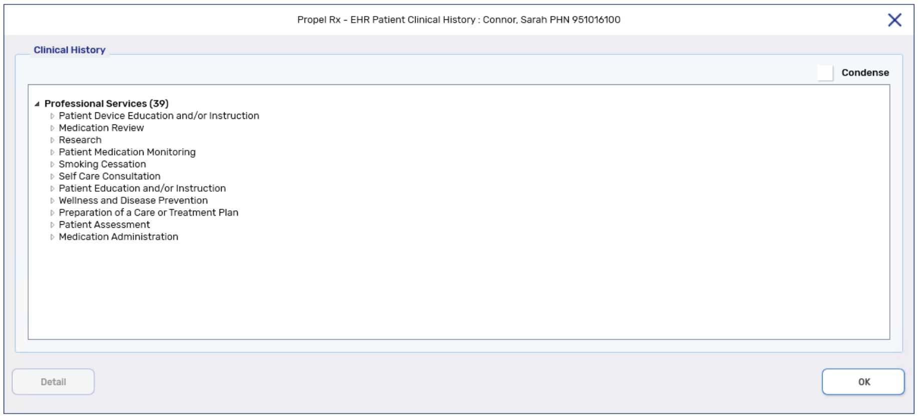
VIEWING EHR PROFESSIONAL SERVICES

The EHR Query button in the Clinical History section allows you to view all consultations on a patient's EHR.

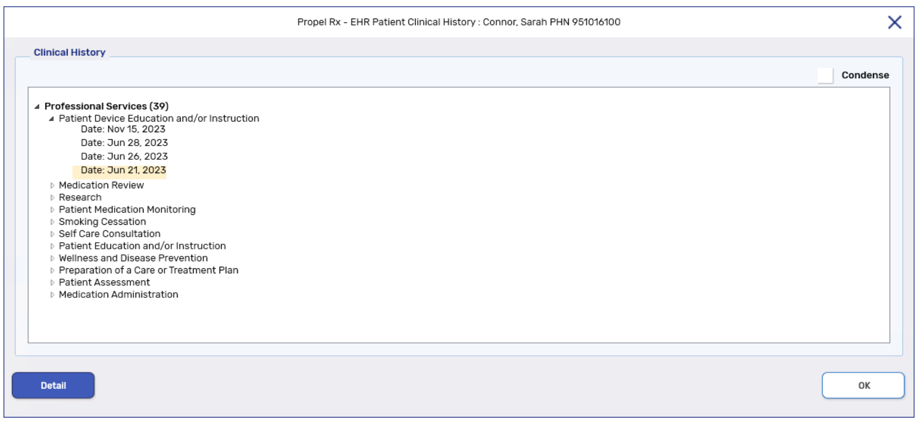
ALERT: The EHR Query button does not display any Prescriptions, Other Medications, or Allergies/Intolerances. Only Professional Services on the EHR are returned.

To view Professional Services on a patient's EHR:

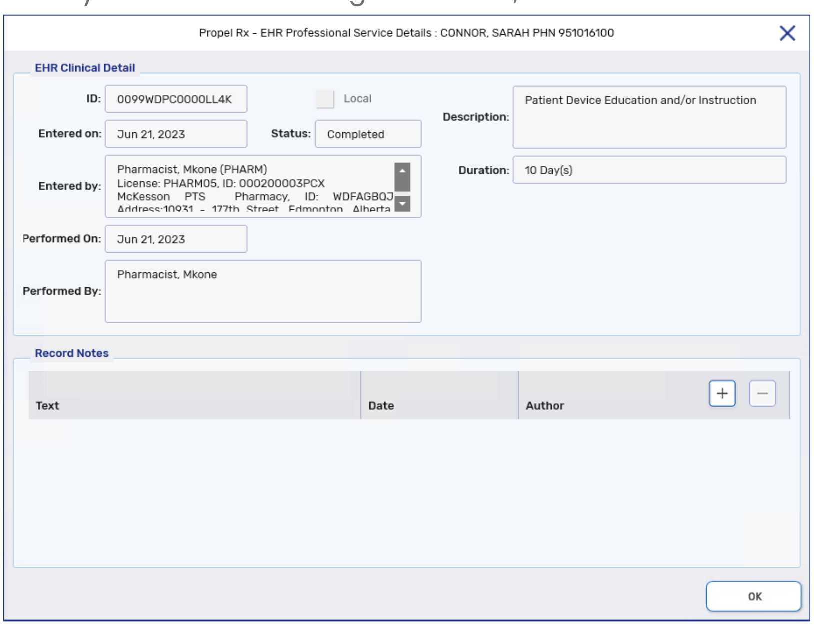
1. Open the **Patient Folder**.
2. Select the **Clinical** tab.
3. In the **Clinical History** section, select **EHR Query**. The EHR Patient Clinical History window opens.
4. Professional services are sorted by service type and then in descending order by date. Choose to view in either a condensed or uncondensed mode by selecting/deselecting the **Condense** checkbox. By default, the checkbox is deselected (i.e., default view is uncondensed).



5. Use the expander buttons to reveal (▷) or hide (◢) additional summary details.
6. Highlight the summary information.



7. Select **Detail** to view more information.
8. Once you are done viewing the details, select **OK**.



ADDING PROFESSIONAL SERVICES TO THE EHR

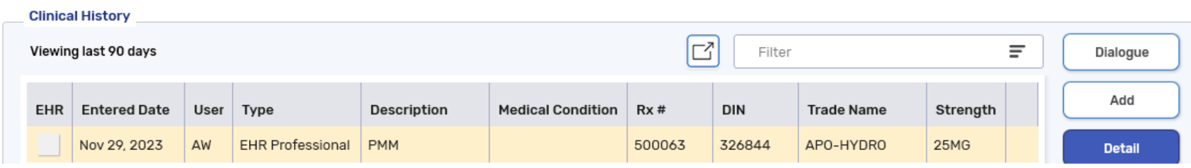
Only EHR Professional Services can be transmitted to the EHR from the Clinical History section.

Adding Existing Professional Services to the EHR

ALERT: Clinical History records added before EHR integration cannot be sent to the EHR. To transmit these records to the EHR, create new records and assign them a Type of EHR Professional Service.

To transmit an existing Professional Service to a patient's EHR after EHR integration in Propel Rx:

1. Open the **Patient Folder**.
2. Select the **Clinical** tab.
3. In the **Clinical History** section, highlight the consultation you wish to transmit to the EHR.



4. Select **Detail**. The Clinical Notes window opens.
5. Select the **EHR** checkbox at the top.
6. If you want to transmit any notes to the EHR, select the applicable **EHR** checkbox(es) in the **Notes** section.
7. Select **OK**.
8. Select **Save**.

A processing message displays indicating the information is being transmitted to the EHR. Once the EHR has been updated with this local information, the **EHR** column in the Clinical History section displays a checkmark.

If a Detected Issue is returned by the EHR, the record is saved locally but will not be transmitted to the EHR until appropriate action is taken.

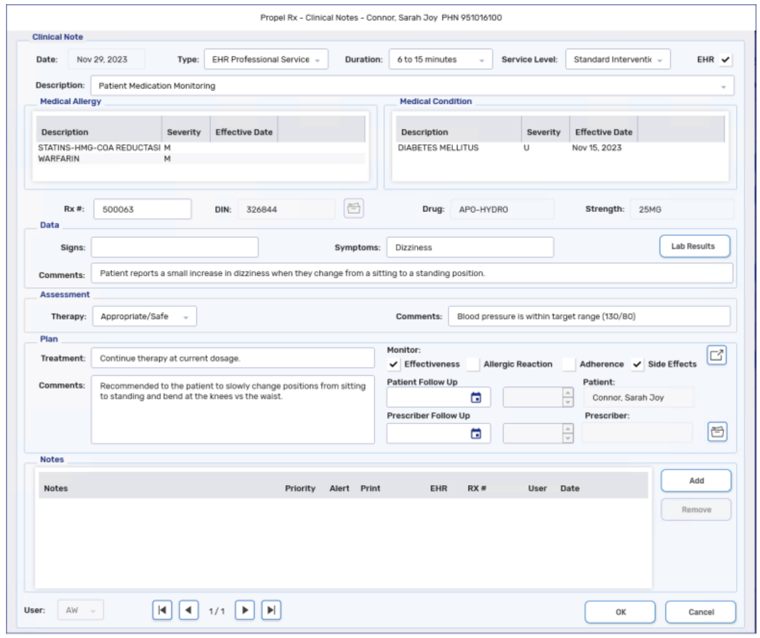
Adding New Professional Services to the EHR

When adding a new Professional Service to the EHR, you must specify the Type and Description. All other fields are optional but recommended to be entered for your local records.

To add a new Professional Service to a patient's EHR:

1. Open the **Patient Folder**.
2. Select the **Clinical** tab.
3. In the **Clinical History** section, select **Add**. The Clinical Notes window opens.
4. From the **Type** dropdown, select EHR Professional Service.

5. The **EHR** checkbox is selected by default. If you do not want to transmit the consultation to the EHR, deselect this checkbox.
6. *Optional*: Dropdown the **Duration** and **Service Level** fields and select the applicable options.
   Duration and Service Level are not transmitted to the EHR. Duration will always default to 1 day on the EHR regardless of what was entered.
7. Dropdown the **Description** field and select the applicable description for the consultation.
8. Complete the **Data**, **Assessment**, and **Plan** sections. Information in the Data, Assessment, and Plan sections are not transmitted to the EHR.



9. To add notes, select the **Add** button in the **Notes** section.
   a. Enter the information for the note in the textbox. A maximum of 2000 characters can be entered.
   b. Ensure the **EHR** checkbox in the Notes section is selected if you wish to transmit the note to the EHR. By default, this checkbox is ON if the EHR checkbox is selected for the overall record.
   c. For information on the different checkboxes for a note, see [Adding Notes for an EHR Professional Service].
10. Select **OK**.
11. Select **Save**.

A processing message displays indicating the information is being transmitted to the EHR. Once the EHR has been updated with this local information, the **EHR** column in the Clinical History section displays a checkmark.

If a Follow-Up was entered, an entry is added to the Activities tile for the scheduled Follow-Up date. By default, when a Follow-Up is processed, it is saved locally. To transmit the Follow-Up to the EHR, you must change the Type to EHR Professional Service, complete the Follow-Up, and then follow the instructions in [Adding Existing Professional Services to the EHR].

If a Detected Issue is returned by the EHR, the record is saved locally but will not be transmitted to the EHR until appropriate action is taken.

ADDING NOTES TO THE EHR FOR PROFESSIONAL SERVICES

You can add notes to an existing EHR Professional Service record and transmit them to the EHR if needed. This is useful for conveying additional information to other healthcare professionals. For example, if there's information in any of the Professional Service fields that you want to transmit, you can copy and paste it into the Notes field for transmission. Notes can be added for records that are saved locally in Propel Rx or only exist on the EHR. Once a record is transmitted to the EHR, it cannot be modified except by adding notes.

Smarter & Faster

Adding Notes to Professional Service Records

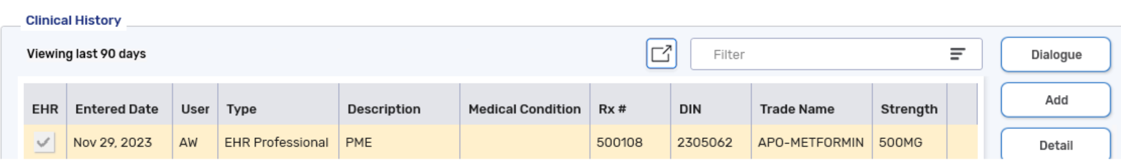
If a note was transmitted to the EHR in error, it cannot be removed or edited. Add another note to convey additional information if needed.

Adding Notes to the EHR for Local Professional Services

To add notes for a local EHR Professional Service record:

1. Open the **Patient Folder**.
2. Select the **Clinical** tab.
3. In the **Clinical History** section, highlight the EHR Professional Service record.

NOTE: Records that were entered in the last 90 days are visible in the Clinical History grid. Older records can be viewed by selecting the expander button beside the Filter field. However, older records are read-only and cannot be retracted or updated with notes.

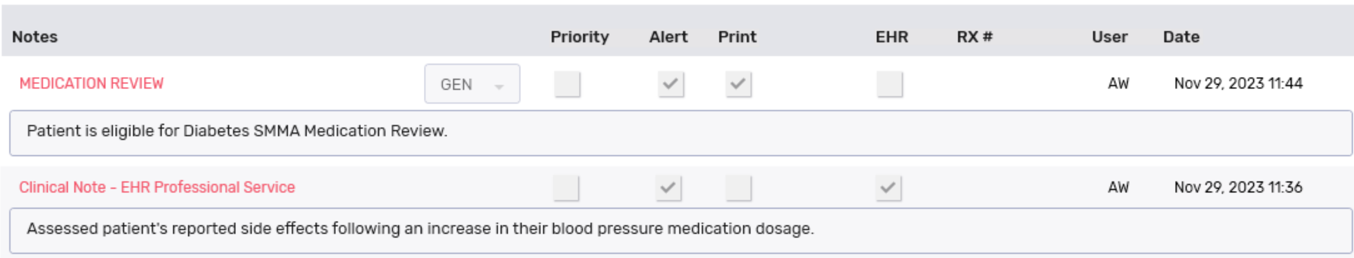


4. Select **Detail**. The Clinical Notes window opens.
5. In the **Notes** section, select **Add**.
6. Enter information in the Notes text box. A maximum of 2000 characters can be entered.
7. Select the following checkboxes if applicable:
   - **Priority** – if you want the note to pop up as an alert when opening the Patient Folder or processing a prescription in Rx Detail. If you already viewed the pop up when opening the Patient Folder, it does not display again in Rx Detail.
   - **Alert** – if you want the note to appear in the Rx Detail Alerts section when processing a prescription.
   - **Print** – if you want the note to print under the Notes/Alerts section of the Half label or if Digital Workflow is enabled, appear in the Clinical Review Notes tab.

- **EHR** – if you want to transmit the note to the EHR. By default, this checkbox is ON if the EHR Professional Service record has been transmitted to the EHR.

8. Select **OK**.
9. Select **Save**.

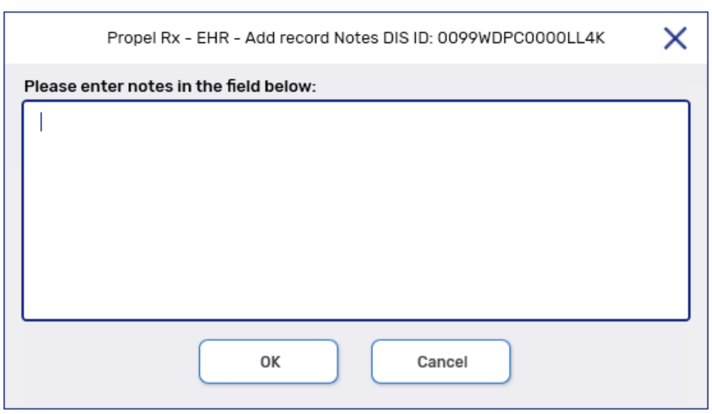
A processing message displays indicating the information is being transmitted to the EHR. The **Note** checkbox displays a checkmark, and the note also displays in the **Patient Folder Notes** tab with a Clinical Note – EHR Professional Service identifier.



Adding Notes to the EHR for Non-Local Professional Services

To add notes to a non-local EHR Professional Service record:

1. Open the **Patient Folder**.
2. Select the **Clinical** tab.
3. In the **Clinical History** section, select **EHR Query**. The EHR Patient Clinical History window opens.
4. Select the applicable EHR Professional Service record.
5. Select **Detail**. The EHR Professional Service Details window opens.
6. In the **Record Notes** section, select the **Add** button +. The Add Record Notes window opens.



7. Enter your note in the text box. A maximum of 2000 characters can be entered.
8. Select **OK**. A processing message appears for the transmission of the note to the EHR. If the transmission was successful, the note appears in the Record Notes section.
9. Select **OK** to close the EHR Professional Service Details window.
10. Select **OK** to close the EHR Patient Clinical History window.

RETRACTING EHR PROFESSIONAL SERVICES

It is possible to retract EHR Professional Services sent to the EHR from Propel Rx.

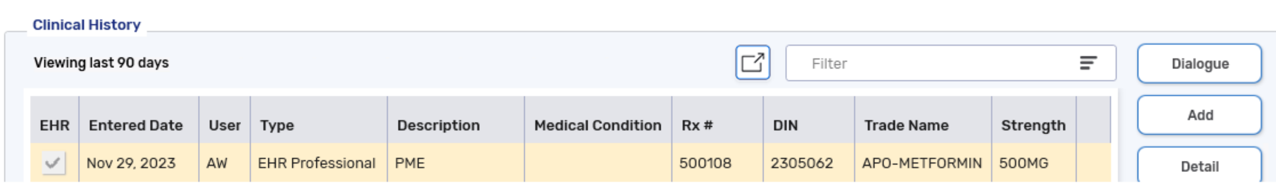
Updating Unretractable Professional Service Records

If a note was added to an EHR Professional Service by another facility, the record cannot be retracted. Enter a note to convey additional information if needed.

To retract an EHR Professional Service record:

1. Open the **Patient Folder**.
2. Select the **Clinical** tab.
3. In the **Clinical History** section, highlight the EHR Professional Service record to retract.

NOTE: Records that were entered in the last 90 days are visible in the Clinical History grid. Older records can be viewed by selecting the expander button beside the Filter field. However, older records are read-only and cannot be retracted or updated with notes.



4. Select **Detail**. The Clinical Notes window opens.
5. Deselect the **EHR** checkbox at the top.
6. Select **OK**.
7. Select **Save**.

A processing message displays indicating the information is being retracted from the patient's EHR. If the removal of the EHR Professional Service record is successful, the **EHR** checkbox for the record is deselected in the Clinical History section.

Patient Profile

A patient's local profile is displayed in the Patient Folder Profile tab. The local profile contains prescriptions and DURs (Other Medications) entered by your pharmacy that may or may not reside on the EHR.

You can also view the patient's EHR Profile, provided the patient is synced in Propel Rx. The EHR Profile displays records transmitted to the EHR that may or may not exist locally in Propel Rx. It can be requested manually wherever the Rx menu is available, but a view can also be forced during certain EHR interactions.

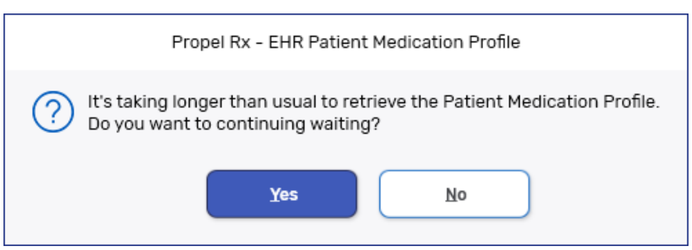
If a patient is synced with their secondary PHN, a Detected Issue will be returned when an EHR Profile is forcibly or manually initiated. You can select OK to the Detected Issue and the EHR Profile will be displayed. However, you will not be permitted to transmit any information to the EHR (e.g., prescriptions, clinical information) for this patient until they're synced to their primary PHN. For more information, see Unsyncing and Resyncing a Patient.

Forced Viewing of a Patient EHR Profile

The **Patient Medication Profile** is displayed automatically in the following situations if it was not already viewed in the past 2 hours for the patient:

- When a Clinical Information record is added or detailed.
- When a Clinical History record is added or detailed.
- When a prescription is processed, except if it's batched.
- When a prescription is inactivated or reactivated.
- When a DUR is added or detailed.

In the above scenarios, the Patient Medication Profile displays before any other windows are opened. If the Profile cannot be loaded within 10 seconds, a prompt will appear with the options to bypass the forced view or continue waiting. If **Yes** is selected to the prompt, the user can proceed without viewing the Profile.



Manually Viewing a Patient EHR Profile

In Alberta, there are 4 different types of EHR Profile requests you can make:

- **Patient Medication Profile** – includes all clinically relevant prescriptions and DURs that have been transmitted to the EHR and/or exist locally. Allergies, Intolerances, EHR Professional Services, and patient notes transmitted to the EHR are also included.
    - For EHR records, clinical relevance is evaluated by Alberta Health when the Profile request is initiated.
    - For local only records, clinical relevance is evaluated by Propel Rx according to criteria set out by Alberta Health guidelines. Local only prescriptions are included if they haven't expired, and the Drug is set to transmit to the EHR. Local only DURs are included if they're active.

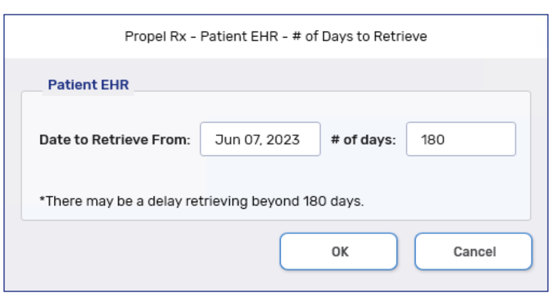
    NOTE: The Rx Life Expiry Date and Default Rx Expiry Days preferences determine what the default expiry date is for a prescription. This can be overridden at the prescription level in the Rx Detail Extended tab.

- **Eligible EHR Rx's** – includes Active and Suspended prescriptions that have been transmitted to the EHR and can be dispensed.
- **Historical EHR Rx's** – includes prescriptions that have been transmitted to the EHR within a defined period (up to a maximum of 20 years), regardless of dispensing status or clinical relevance.
- **EHR Rx Search** – includes only the specified prescription if it has been transmitted to the EHR.

To view a patient's EHR Profile manually:

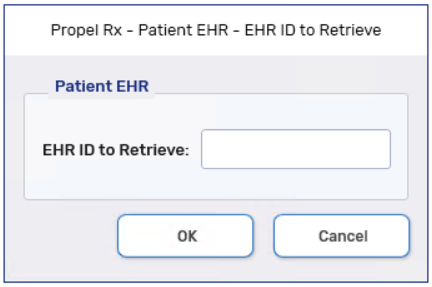
1. Do one of the following:
    - From the **Patient Folder Profile** tab, select **Rx** > **Profile**.
    - From the **Workbench**, highlight a prescription and then select **Rx** > **Profile**.
    - From a **Workflow Detail** window (i.e., Data Entry, Packaging, Technical Validation, Clinical Review), select **Rx** > **Profile**.
2. Select one of the Profile options.
    - If **Historical EHR Rx's** was selected, an additional window opens with the option to customize the number of days' worth of data to retrieve. By default, 180 days is auto-populated, but a maximum of 20 years can be entered. Enter the desired value and select **OK**.

    NOTE: If more than 180 days is entered, there may be a delay in retrieving the data.



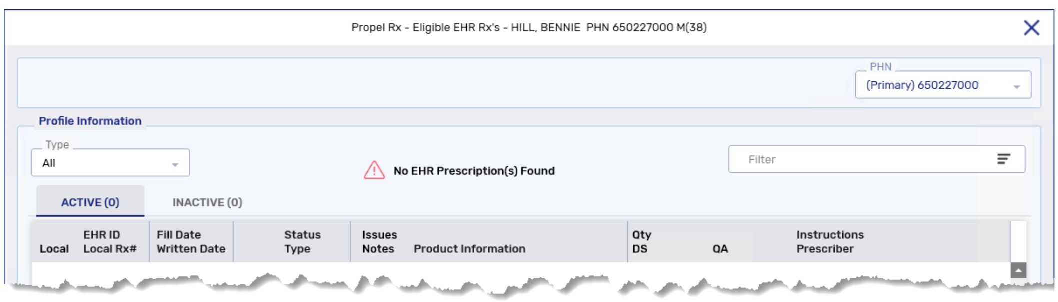
- If **EHR Rx Search** was selected, enter the EHR Rx ID in the window that opens and select **OK**. The EHR Rx ID can be found in the Create section of the Rx Detail EHR tab. This number is not the same as the prescription number in Propel Rx.

  NOTE: The EHR Rx Search is performed against the primary PHN initially. If the EHR Rx ID is found on a patient's secondary PHN Profile, you can re-initiate a search by selecting the secondary PHN in the EHR Profile window.



The EHR Profile window opens with the type of request indicated at the top.

NOTE: If no EHR prescriptions or DURs are returned, a warning indicates that none were found. For the Patient Medication Profile, local only prescriptions or DURs may still be returned if they exist.



3. Once you are done viewing the patient's EHR, select **OK**.

Overview of the EHR Profiles

Depending on the EHR Profile request, the following information may be displayed:

- **Clinical Information** – this section only appears when a Patient Medication Profile is requested. All Allergies, Intolerances, EHR Professional Services, and patient notes that have been transmitted to the EHR are listed. The same information can be viewed from the Patient Folder Clinical tab and Patient Folder Notes tab using the EHR Query buttons on their respective windows.
- **Profile Information** – this section appears for all EHR Profile requests. It contains prescriptions and DURs divided under Active and Inactive tabs. Each record is categorized as (i) EHR only, (ii) EHR and Local, and (iii) Local only. Local only records are only visible on the Patient Medication Profile.

OVERVIEW OF THE PATIENT MEDICATION PROFILE WINDOW

The Patient Medication Profile window is broken into Clinical and Profile Information, as shown below.

Active/Inactive Tabs
Separates prescriptions based on Status. Aborted and Suspended prescriptions appear in the Inactive tab. Active and Completed prescriptions appear in the Active tab.

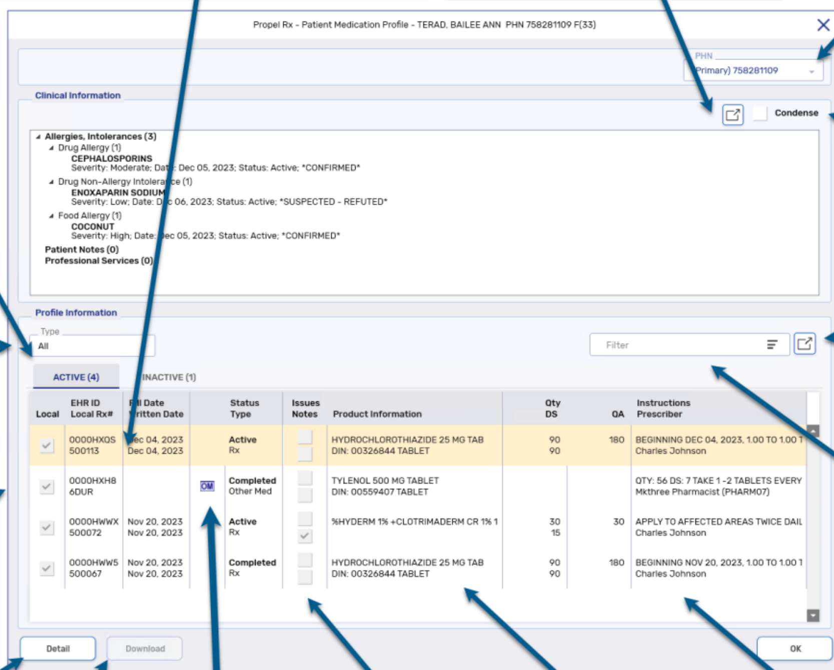
If the prescription is local only, the Propel Rx Statuses are mapped to the EHR Statuses as follows:
- **Discontinued** -> **Aborted**
- **Revoked** -> **Completed**
- **Inactivated** -> **Suspended**
- **Suspended** -> **Suspended**
- Not expired with refills remaining -> **Active**
- Expired or no refills remaining -> **Completed**

Fill Date and Written Date
Other Medications will not display these dates.

Prescriptions are sorted in descending order by Fill Date or if Fill Date is unavailable, Written Date or Entered On Date. The Entered On Date is used to sort Other Medications.

Expander - Clinical Information
Select the expander button to expand the Clinical Information view. Additional details of a highlighted Clinical Information record can be viewed by selecting the Detail or History buttons after expansion.

PHN
If the patient has a secondary PHN, a dropdown is available to choose the PHN. By default, the primary PHN is selected. When a different PHN is selected, the Profile view is updated.



Condense
Displays less detailed Clinical information, allowing more information to be displayed on the screen.

Expander - Profile Information
Select the expander button to expand the Profile Information view.

Type
Allows view of:
- All Types
- Prescriptions (Rx)
- DURs (Other Med)

The **Local** column indicates if the prescription is:
- - Local Only
- - EHR Only
- - Local & EHR

Netcare batch prescriptions will always appear as EHR Only even if they exist locally.

Filter
Allows prescriptions to be filtered by any field such as EHR ID, Product Information, Instructions, Prescriber, Written Date, QA, etc. The Filter cannot be used to search by Type.

Detail
Displays the details of the highlighted row, showing all related EHR information. If a prescription is local only, the Detail button is disabled.

Download
Permits your pharmacy to download a non-local prescription and dispense it at your pharmacy.

Prescription Source
Indicates the source of the prescription or if it's an Other Medication.
- - Cancer Center Dispense
- - Blue Cross Dispense
- - Pharmacy Batch Dispense
- - Other Medication

These icons also display beside the EHR Rx ID in the Rx Details window.

Issues and Notes
Indicates if there were any Detected Issues returned for the prescription or DUR and/or Record Notes.

Product Information
Displays the details of the drug. For mixtures, the DIN does not display.

Prescription Information
Displays the details of the prescription. If an additional SIG was entered, it displays in the Instructions field. Depending on the length of the instructions, you may need to detail the record to see the full text.

OVERVIEW OF THE ELIGIBLE EHR RX'S, HISTORICAL EHR RX'S, AND EHR RX SEARCH WINDOW

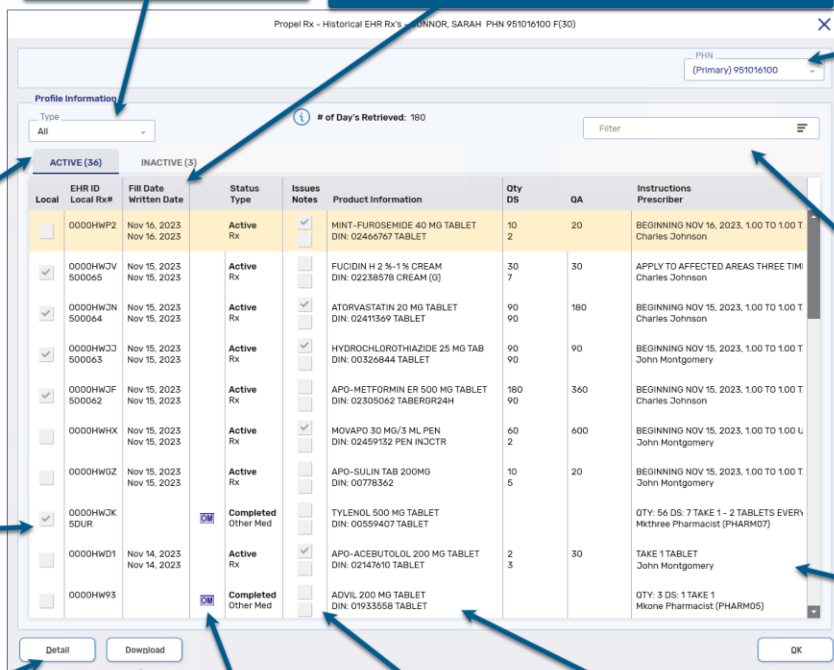
Unlike the Patient Medication Profile, the other EHR Profiles only display Profile Information for prescriptions that have been transmitted to the EHR. Prescriptions and DURs that are local only are not included.

Type
Allows view of:
-All Types
-Prescriptions (Rx)
-DURs (Other Med)

Fill Date and Written Date
Other Medications will not display these dates.

Prescriptions are sorted in descending order by Fill Date or if Fill Date is unavailable, Written Date or Entered On Date. The Entered On Date is used to sort Other Medications.

PHN
If the patient has a secondary PHN, a dropdown is available to choose the PHN. By default, the primary PHN is selected. When a different PHN is selected, the Profile view is updated.



Active/Inactive Tabs
Separates prescriptions based on Status. Aborted and Suspended prescriptions appear in the Inactive tab. Active and Completed prescriptions appear in the Active tab.

Filter
Allows prescriptions to be filtered by any field such as EHR ID, Product Information, Instructions, Prescriber, Written Date, QA, etc. The Filter cannot be used to search by Type.

The **Local** column indicates if the prescription is:
- Local Only
- EHR Only
- Local & EHR

Netcare batch prescriptions will always appear as EHR Only even if they exist locally.

Prescription Information
Displays the details of the prescription. If an additional SIG was entered, it displays in the Instructions field. Depending on the length of the instructions, you may need to detail the record to see the full text.

Detail
Displays the details of the highlighted row, showing all related EHR information.

Download
Permits your pharmacy to download a non-local prescription and dispense it at your pharmacy.

Prescription Source
Indicates the source of the prescription or if it's an Other Medication.
- C - Cancer Center Dispense
- Blue Cross Dispense
- R - Pharmacy Batch Dispense
- OM - Other Medication

These icons also display beside the EHR Rx ID in the Rx Details window.

Issues and Notes
Indicates if there were any Detected Issues returned for the prescription or DUR and/or Record Notes.

Product Information
Displays the details of the drug. For mixtures, the DIN does not display.

OVERVIEW OF THE EHR – RX DETAILS WINDOW

When viewing an EHR Profile, whether it was forced or requested on demand, you can highlight a prescription and select Detail to view more information about the Create and Dispense.

NOTE: You can only Detail one prescription at a time from the EHR Profile. If multiple prescriptions are highlighted when Detail is selected, only the first highlighted prescription opens.

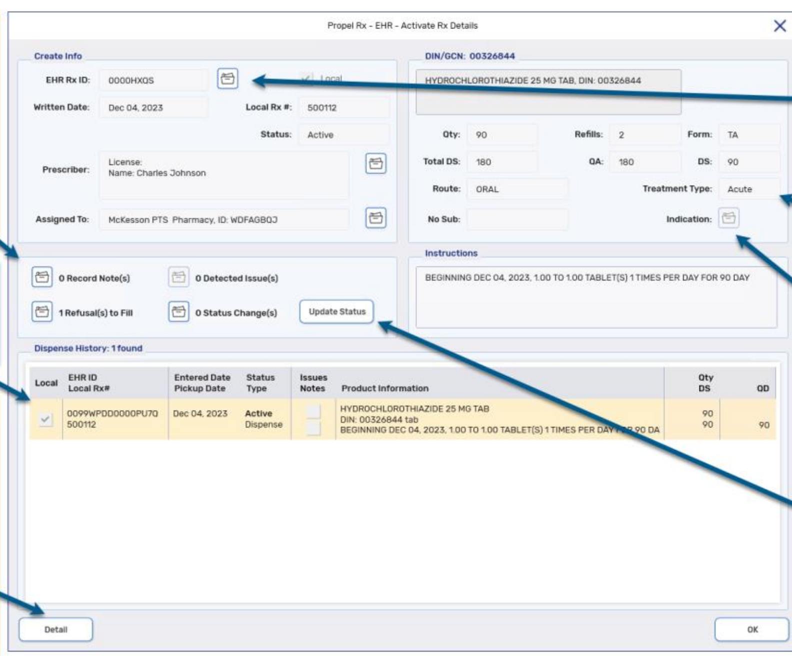
The **EHR – Rx Details** window is broken up into 5 separate sections:

- **Create Info** – this section is "how the prescriber wrote the prescription." Details such as the Local Rx #, Written Date, Prescriber, Status, and Assigned Pharmacy are displayed.
- **DIN/GCN** - this section outlines details of the prescription, including Quantity Authorized, Refills, Days Supply, Treatment Type, etc. The Description includes the ingredient names, strength, form, and DIN.
- **Instructions** – this section displays the instructions for the prescription, including any Additional Instructions if they exist.
- **Record Notes/Detected Issues/Refusals to Fill/Status Changes** – this section indicates if:
    - Notes were added to the prescription and transmitted to the EHR. You can also add notes to the Create or Dispense from the EHR – Rx Details window. For more information, see Adding a New Prescription Note from the EHR.
    - Detected Issues were returned by the EHR at the time of fill.
    - A Refusal to Fill was submitted.
    - The prescription status was changed.
- **Dispense History** – this section outlines each dispense as its own record. Additional information about each dispense can be viewed by highlighting the dispense and selecting Detail.

Folder Buttons
Select the folder button if the number beside the button is greater than 0 to display more information about Notes, Detected Issues and Issue Management, Refusals to Fill, or Status Changes.

Local
Indicates if the record resides locally within Propel Rx.

Detail
Highlight a row and select Detail to view additional details regarding the dispense including who dispensed the prescription, Detected Issues, Record Notes, etc. The information that displays is similar to the top section of this window.



Additional Rx Information
Select the folder button to view additional details regarding the prescription (e.g., Rx Start Time/End Time, Previous EHR Rx ID, Dispensable Status, etc.).

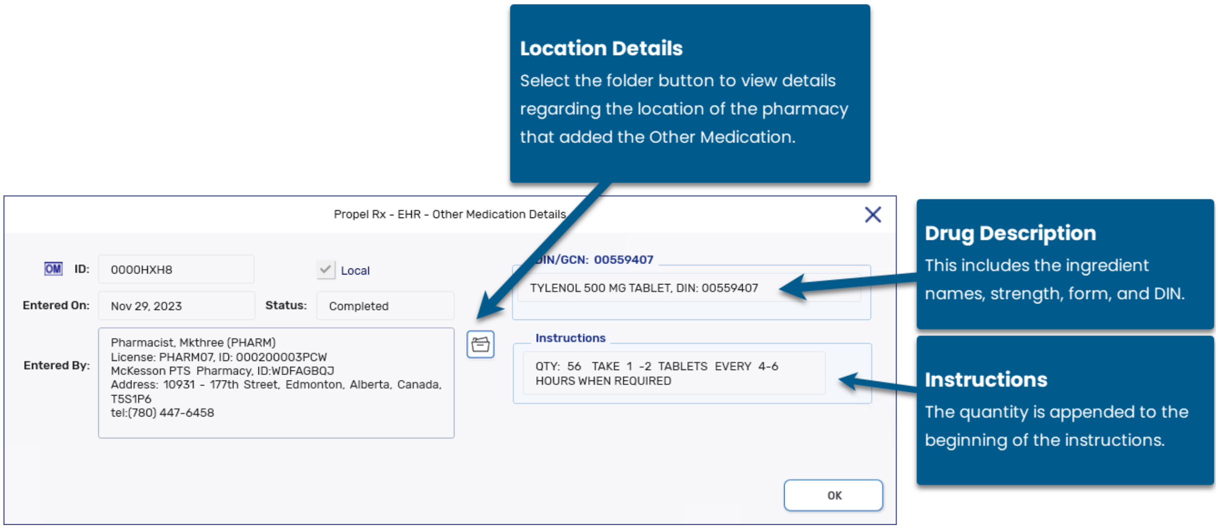
Treatment Type
Defaults to Acute for inferred prescriptions.

Indication and No Sub
Only applicable to pharmacist prescribed prescriptions.

Update Status
Allows you to update the status of a local or non-local prescription to:
-Abort (Discontinue)
-Revoke
-Suspend
-Resume

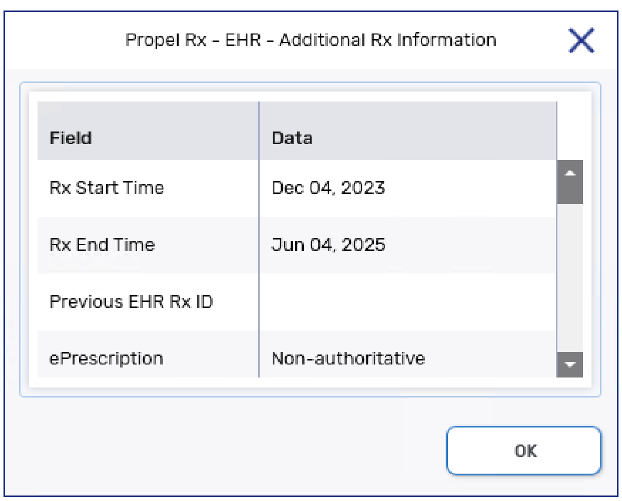
OVERVIEW OF THE EHR – OTHER MEDICATION DETAILS WINDOW

Other Medications are over the counter drugs, such as natural health products, or products dispensed out of province at another health facility. The **EHR – Other Medication Details** window displays the details as recorded on the EHR.



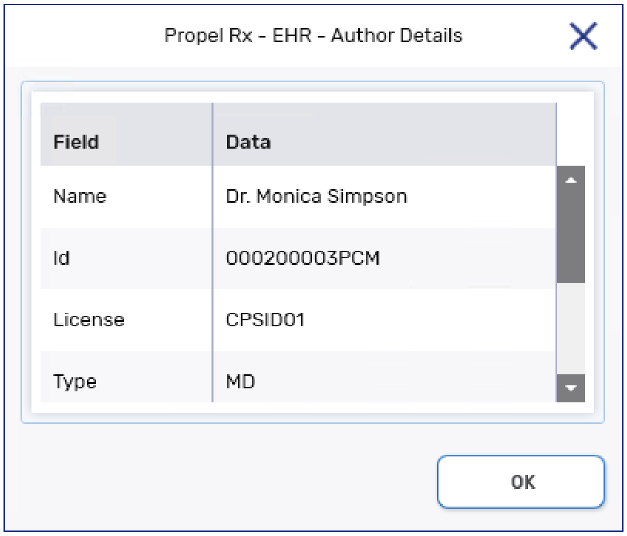
Sample Additional Rx Information Window

When the folder button beside the EHR Rx ID field is selected in the EHR – Rx Details window, the Additional Rx information window opens. The window appears like the following:



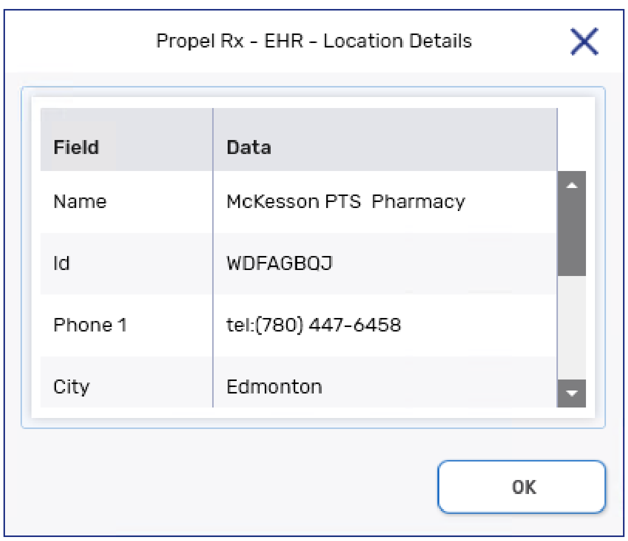
Sample Author Details Window

When the folder button beside the Prescriber field is selected in the EHR – Rx Details window, the Author Details window opens. The window appears like the following:



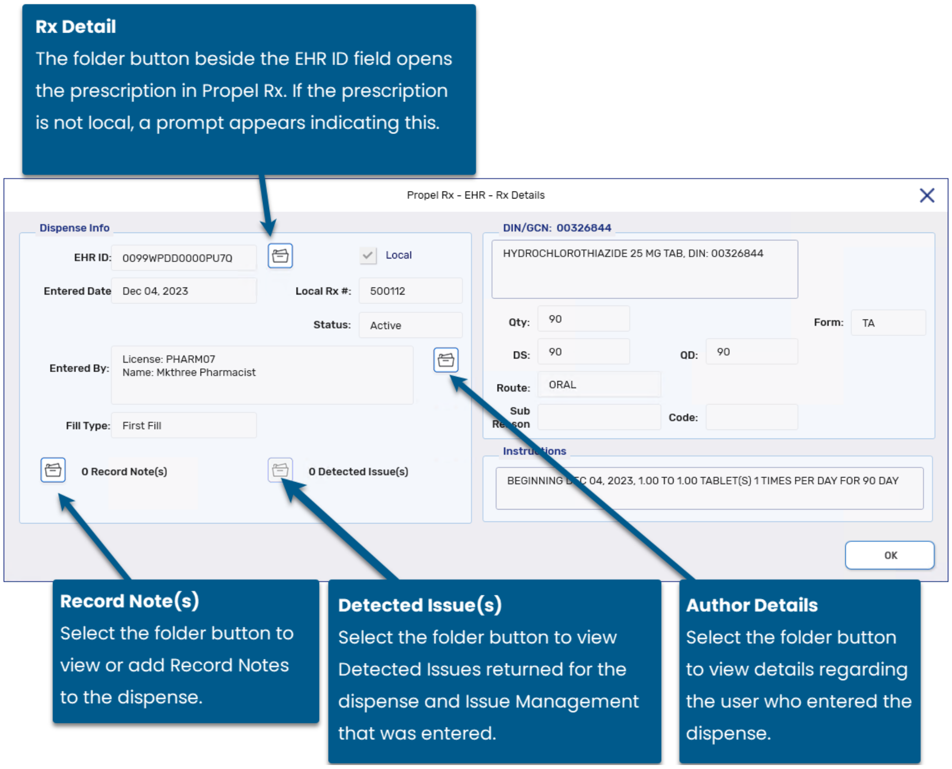
Sample Location Details Window

When the folder button beside the Assigned To field is selected in the EHR – Rx Details window, the Location Details window opens. The window appears like the following:



Sample EHR – Rx Details Window

When a dispense is detailed from the EHR – Rx Details window, another window opens with additional information like the following:



EHR Profile Compare

The EHR Profile Compare window allows you to compare a patient's clinical and prescription information on the EHR with Propel Rx. If a mismatch is found, EHR information can be copied over to Propel Rx, similar to the process of a Patient Compare. Prescription records spanning the last 2 years can be compared.

This is a manual process and can be incorporated into your Workflow as needed. Some scenarios for using the EHR Profile Compare are provided below.

- **New patient** - download the Allergies/Intolerances from the EHR.
- **Hospital discharge** – compare prescription or clinical changes that might have occurred during the patient's hospitalization.
- **Returning patient** – update the prescription or clinical information for a patient that hasn't visited your pharmacy in a while.

Troubleshooting Detected Issues Due to Mismatched Clinical or Prescription Information

If there's a mismatch between the local clinical or prescription information and the EHR, Detected Issues may be returned when performing actions that involve EHR transmission. Examples include:

- A Prescription that cannot be dispensed in its current status.
- An Allergy that cannot be refuted.
- The No Known Allergies state cannot be submitted.

If this happens, perform an EHR Profile Compare, and update the information in Propel Rx to match the EHR.

Once the EHR Profile Compare window is opened, a lock is placed on the Patient Folder and prescriptions. The lock will block you from adding or updating information in any Patient Folder tabs. However, you can still view information and perform EHR queries. In the Profile tab, you can only perform prescription actions such as filling, correcting, inactivating, transferring, etc. for the non-locked prescriptions. The lock will be released once the EHR Profile Compare window is closed.

Conversely, the EHR Profile Compare window cannot be opened if the Patient Folder or prescription is opened on another workstation or instance. The lock will be released once the Patient Folder or prescription is closed.

TIP: The instance or workstation that has the patient or prescription locked is indicated in the lock prompt. Use this information to remove the lock from the specified location if needed.

OVERVIEW OF THE EHR PROFILE COMPARE WINDOW

The EHR Profile Compare window is broken into two tabs. If there are no discrepancies returned for a tab, this will be indicated on the applicable tab. If no discrepancies were found for either tab, a prompt will appear indicating this and the EHR Profile Compare window will not open.

- **Prescription** - displays prescriptions that have been sent to the EHR but have a mismatched status in Propel Rx. Simar to the EHR Profile, prescriptions are sorted in descending order by Fill Date and then by Written Date. If a prescription chain exists, only the most recent prescription is included in the window. Prescriptions residing in the EHR Queue are excluded until they are sent successfully to the EHR.

NOTE: If a reauthorized prescription is incomplete or queued, it will not display in the EHR Profile Compare window. To view the previous prescription's status, refer to the Patient Medication Profile. Transferred out prescriptions are also excluded.

- **Clinical** - displays Allergies and Intolerances that have been sent to the EHR but there is one or more discrepancies compared to the Propel Rx records. Discrepancies include the following:
    - The Allergy or Intolerance only exists on the EHR. This includes the No Known Allergies state.
    - The No Known Allergies state exists on the EHR for all 4 sub-types but is not flagged in Propel Rx.
    - A note exists for the Allergy or Intolerance on the EHR but not in Propel Rx.

NOTE: Some notes that are added automatically by the EHR are not considered as discrepancies within the EHR Profile Compare window. These can include notes for an Intolerance Reaction or a refute action.

    - The Severity, Effective Date, Confirmed Status, and Reaction (for Allergies only) are not the same between the EHR and Propel Rx.

Similar to the EHR Clinical Information, records are sorted by type and then alphabetically. Records that have not been transmitted to the EHR, including those residing in the EHR Queue, are excluded until they are sent successfully.

Overview of the EHR Profile Compare Window – Prescription Tab

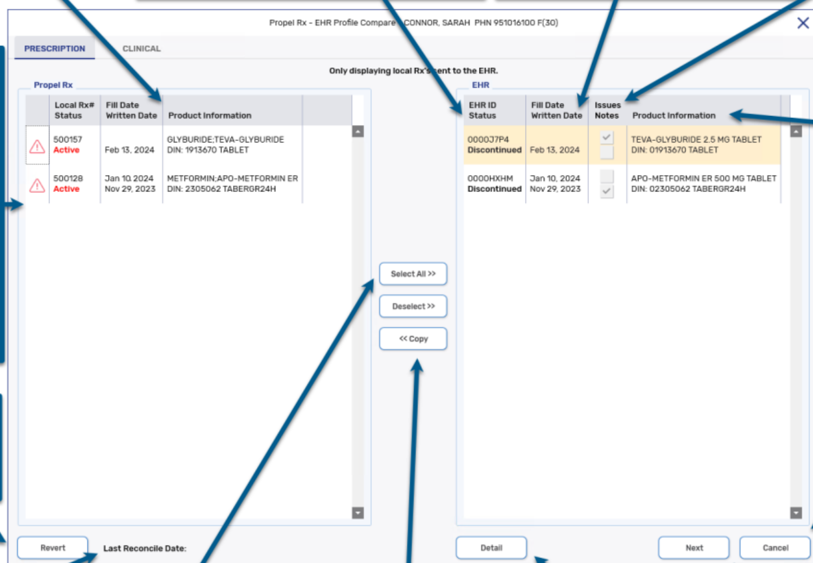
Product Information
On the Propel Rx side, the generic and trade names of the drug are displayed along with the DIN and dosage form.

Status
EHR statuses are mapped as follows:
-Aborted = Discontinued
-Suspended = Inactive
-Active = Active
-Completed = Revoked

Fill Date
If a prescription is cancelled, Fill Date appears on the Propel Rx side but may not appear on the EHR side.

Issues & Notes
These checkboxes indicate if Detected Issues were returned or Record Notes were added to the prescription on the EHR.

Warning Indicator/Checkmark
If there is a mismatch in Status between the Propel Rx and EHR sides, a warning indicator appears on the Propel Rx prescription row and the Status is highlighted in red and bolded. If a status is copied over, a checkmark appears instead.



Product Information
On the EHR side, the trade name of the drug is displayed along with the DIN and dosage form.

Revert
Reverts changes made in the window since it was opened.

Cancel
Closes the window without making changes.

Last Reconcile Date
Displays the date that the last EHR Profile Compare was completed, if it exists.

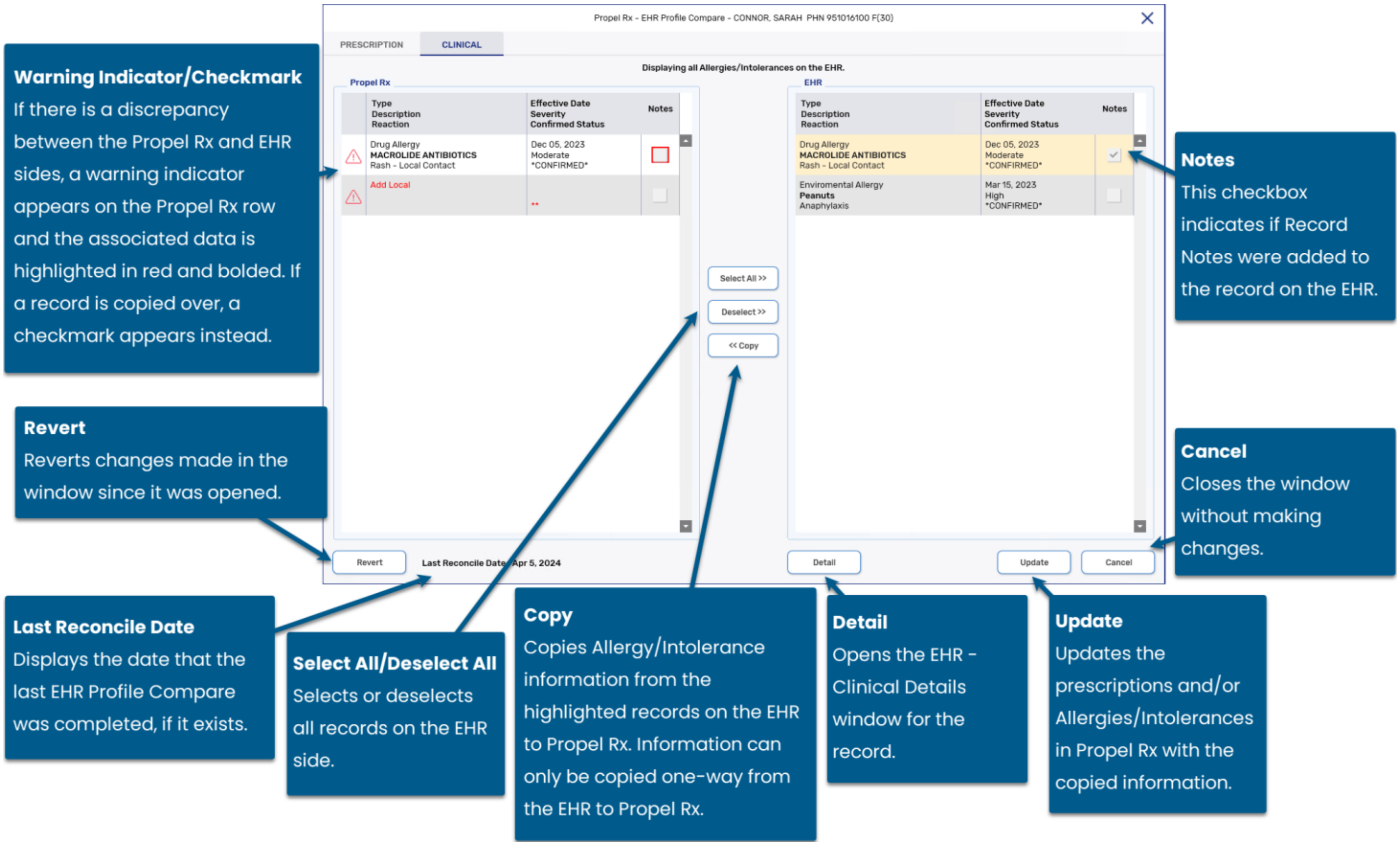
Select All/Deselect All
Selects or deselects all prescriptions on the EHR side.

Copy
Copies the prescription status on the EHR to Propel Rx. Information can only be copied one-way from the EHR to Propel Rx.

Detail
Opens the EHR - Rx Details window for the prescription.

Next/Update
Navigates to the Clinical tab. On the Clinical tab, the button is renamed to Update and updates the local prescriptions with the copied statuses.

Overview of the EHR Profile Compare Window – Clinical Tab



UPDATING LOCAL PRESCRIPTION INFORMATION WITH AN EHR PROFILE COMPARE

To update local prescription information with an EHR Profile Compare:

1. Do one of the following:
   - From the **Patient Folder Profile** tab, select **Rx** > **Profile** > **EHR Compare**.
   - From the **Workbench**, highlight a prescription and then select **Rx** > **Profile** > **EHR Compare**.
   - From a **Workflow Detail** window (i.e., Data Entry, Packaging, Technical Validation, Clinical Review), select **Rx** > **Profile** > **EHR Compare**.

   NOTE: If a discrepancy exists for the prescription that's currently open, a lock prompt will appear. You must close the prescription and open the EHR Profile Compare from one of the other locations.

   The EHR Profile Compare window opens.

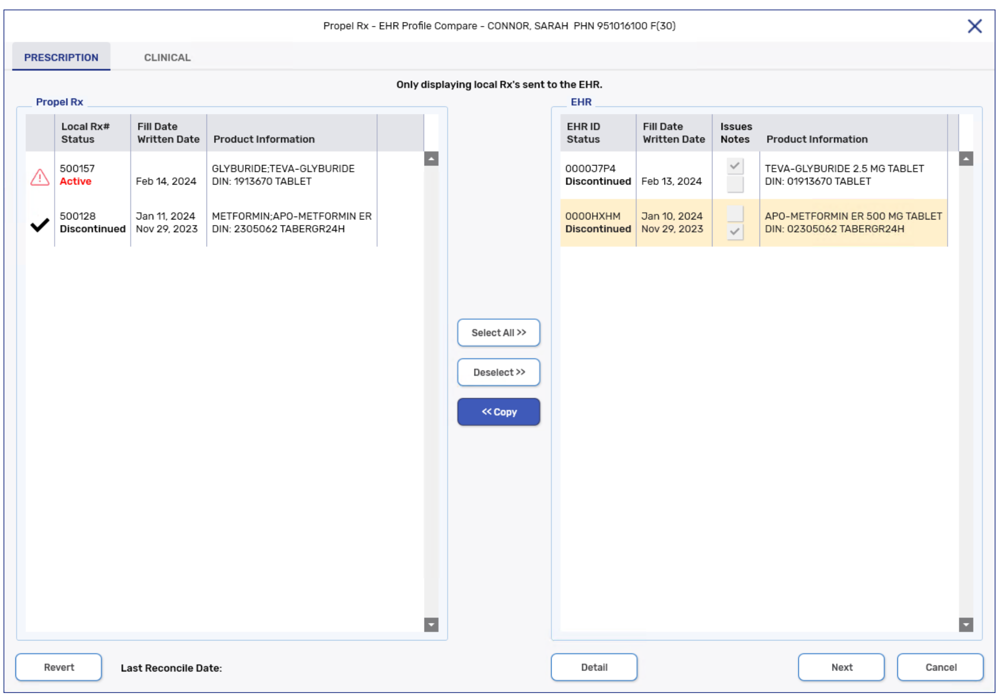
   NOTE: If no discrepancies were found for prescription and clinical information, a prompt appears indicating this and the EHR Profile Compare window will not open.

2. Select the **Prescription** tab at the top, if not already selected.

3. Review the information on the EHR side. If there are any status differences between the left (Propel Rx) and right (EHR) sides, a warning indicator ⚠ appears beside the **Status** field on the left. The mismatched Status is also highlighted in red and bolded.
4. If you want to copy status information from the EHR to Propel Rx, do one of the following:
   - Select one or more prescriptions to copy from the EHR side.
   - Select the **Select All** button to highlight all prescriptions on the EHR side.
5. Select **Copy**. Once information is copied over, a checkmark appears beside the prescription(s) on the left.

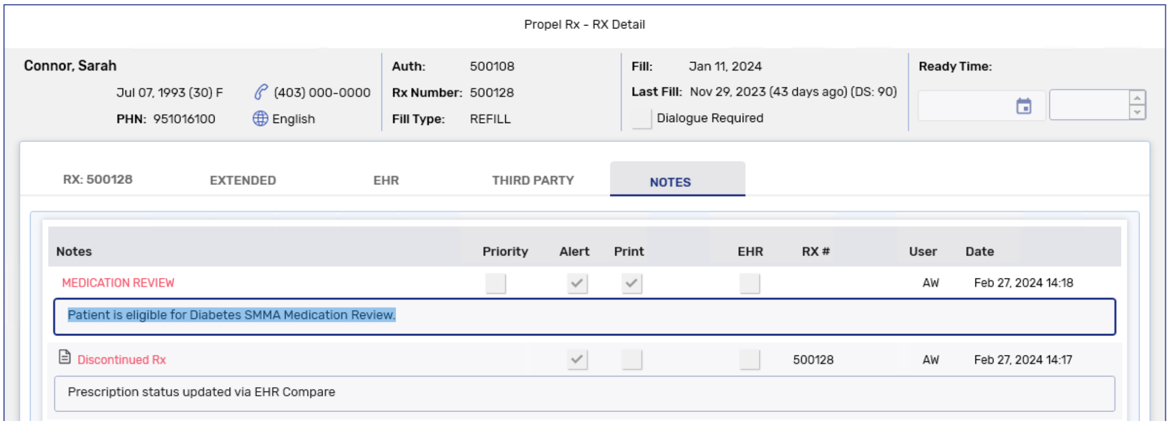
NOTE: In the following situations, prescription information cannot be copied over:

- If a prescription is still in Workflow. A prompt will appear if this is the case. You must cancel the prescription or complete its Workflow before information can be copied over for it. Information for all other prescriptions that were highlighted will be copied over.
- If a prescription is discontinued or revoked in Propel Rx but has a non-matching status on the EHR. This could happen in a Network Down scenario if you abandoned the Discontinue/Revoke transaction in the EHR Queue or updated the prescription while the patient was temporarily unsynced. You can either detail the prescription from the EHR Profile Compare window and update its status or reauthorize the prescription.

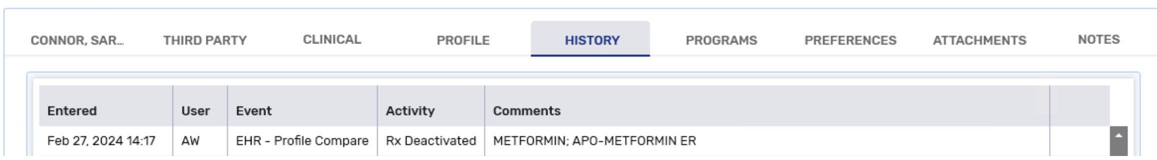


6. Select **Next** to navigate to the **Clinical** tab if it exists.
7. If needed, copy the clinical information from the EHR to Propel Rx. For more information, see Updating Local Clinical Information with an EHR Profile Compare.

9. Select **Update**. The following updates are performed in Propel Rx:
   - The status of the prescription is updated locally. If the status was changed to Discontinued or Revoked, the repeats are removed.
   - A local note is added to the prescription indicating the prescription status was updated via EHR Compare.



   - A row is added to the Patient Folder History tab indicating an EHR Profile Compare Status Update occurred. The date, time, user, drug, and status change are recorded.



UPDATING LOCAL CLINICAL INFORMATION WITH AN EHR PROFILE COMPARE

To update local clinical information with an EHR Profile Compare:

1. Do one of the following:
   - From the **Patient Folder Profile** tab, select **Rx** > **Profile** > **EHR Compare**.
   - From the **Workbench**, highlight a prescription and then select **Rx** > **Profile** > **EHR Compare**.
   - From a **Workflow Detail** window (i.e., Data Entry, Packaging, Technical Validation, Clinical Review), select **Rx** > **Profile** > **EHR Compare**.

   NOTE: If a discrepancy exists for the prescription that's currently open, a lock prompt will appear. You must close the prescription and open the EHR Profile Compare from one of the other locations.

   The EHR Profile Compare window opens.

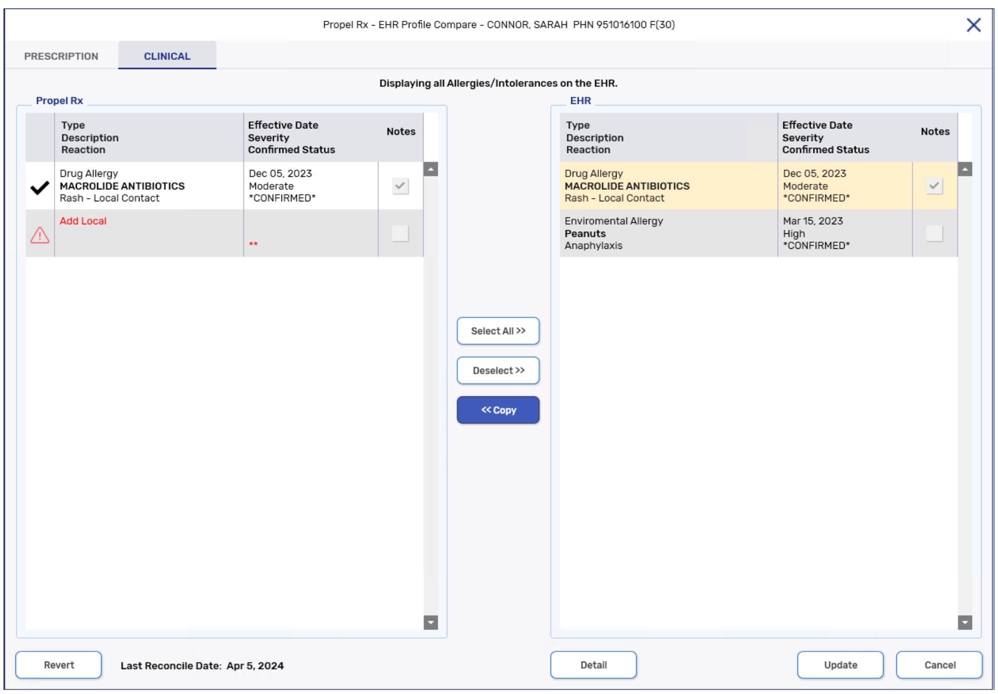
   NOTE: If no discrepancies were found for prescription and clinical information, a prompt appears indicating this and the EHR Profile Compare window will not open.

2. Select the **Prescription** tab, if not already selected.
3. If needed, copy the prescription information from the EHR to Propel Rx. For more information, see Updating Local Prescription Information with an EHR Profile Compare.

4. Select **Next** to navigate to the **Clinical** tab.
5. Review the information on the EHR side. If there are any status differences between the left (Propel Rx) and right (EHR) sides, a warning indicator ⚠ appears on the Propel Rx side. The mismatched data is also highlighted in red and bolded.
6. If you want to copy clinical information from the EHR to Propel Rx, do one of the following:
   - Select one or more records to copy from the EHR side.
   - Select the **Select All** button to highlight all records on the EHR side.
8. Select **Copy**. Once information is copied over, a checkmark appears beside the record(s) on the left.

NOTE: In the following situations, Allergy/Intolerance information cannot be copied over:

- If No Known Allergies is flagged on the EHR but an Allergy/Intolerance exists in Propel Rx. You will be prompted to remove the Allergy/Intolerance in Propel Rx. Alternatively, you can transmit the record to the EHR.
- If a note was autogenerated by the EHR (e.g., Intolerance Created). This note cannot be copied over to Propel Rx.



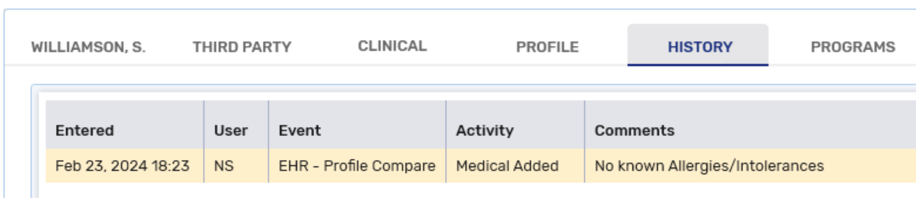
10. Select **Update**. The following updates are made in Propel Rx:
    - If the Allergy/Intolerance cannot be mapped automatically using an FDB code, the Allergy/Intolerance Search window opens with the description pre-populated. Do one of the following:
      - Search for and select the appropriate Allergy/Intolerance. If you choose an Allergy/Intolerance that's slightly different than what's on the EHR, it will not be considered as a discrepancy going forward.

NOTE: If you chose the wrong Allergy/Intolerance in the Search window, you can select Revert or remove the record and re-run the EHR Profile Compare.

- Select **Cancel** to exit the EHR Profile Compare window. Add the Allergy/Intolerance to the Conditions list in **More** (**...**) > **List Maintenance** and then re-run the EHR Profile Compare.

NOTE: The **Reaction** field for an Intolerance will display "See Notes" in the Clinical Details window as the reaction is copied over to the Notes field. The timestamp of the note in Propel Rx will reflect when the note was copied over, whereas on the EHR, the timestamp will reflect when the note was transmitted.

- For existing Allergy/Intolerance records, the applicable fields are updated as per the copied information.
- If the No Known Allergies state was copied over, the associated checkbox in the Patient Folder Clinical tab will be selected. Similarly, if an Allergy/Intolerance was copied over and the No Known Allergies checkbox was selected in Propel Rx, it is deselected automatically.
- A row is added to the Patient Folder History tab indicating an EHR Profile Compare was performed. The date, time, user, activity type, and Allergy/Intolerance are recorded. The activity type varies depending on whether a record was added, updated, or removed (in the case of the No Known Allergies state).



Entered	User	Event	Activity	Comments
Feb 23, 2024 18:23	NS	EHR - Profile Compare	Medical Added	No known Allergies/Intolerances

Patient Notes Tab

A patient note can be added to the EHR if relevant information is revealed through an encounter with the patient. This includes information such as:

- Compliance issues or difficulty swallowing medication (can also be documented as an EHR Professional Service note)
- Needs extra counselling
- Notation regarding family history

ALERT: It is recommended that only clinically relevant patient notes are transmitted to the EHR. Patient notes such as '*Deliveries to Side Door*' or '*Do not cash cheques*' should not be transmitted to the EHR.

If the patient is not synced, a prompt will block you from adding a patient note until you attempt to sync the patient. To qualify as a sync attempt, at minimum, you must select the PHN expander button in the Patient Folder. If you attempted to sync the patient but it was unsuccessful, the prompt will not appear again for that patient till the next day. If a note is added when the patient is not synced, the note will not be transmitted to the EHR.

Once a note is transmitted to the EHR, you cannot edit it. If a correction needs to be made, you can delete or retract the note from the EHR. For more information, see Retracting Notes from the EHR.

Viewing Notes on the EHR

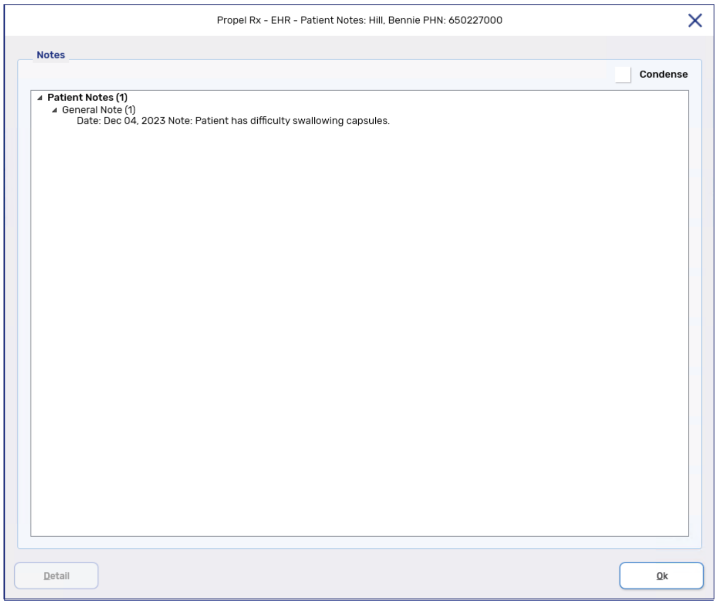
The EHR Query button in the Notes tab allows you to view all notes on a patient's EHR.

To view notes on a patient's EHR:

1. Open the **Patient Folder**.
2. Select the **Notes** tab.
3. Select **EHR Query**. The EHR – Patient Notes window opens.

   ALERT: The EHR Query initiated from the Patient Notes tab only returns patient notes. There are no prescriptions, Other Medications, Allergies/Intolerances, or EHR Professional Services displayed.

4. Choose to view in either a condensed or uncondensed mode by selecting the **Condense** checkbox. Uncondensed is the default view.
5. Notes are sorted by Type and then by Date. Use the expander buttons to reveal ( ) or hide ( ) additional summary view details.



6. Select the summary details for a record.
7. Select **Detail** to view more information.

8. Select **OK** to close the EHR – Patient Notes window.

Adding Notes to the EHR

If a note was added to the EHR in the last 7 days, a "**New Patient Note**" indicator appears at the top of the Patient Medication Profile.

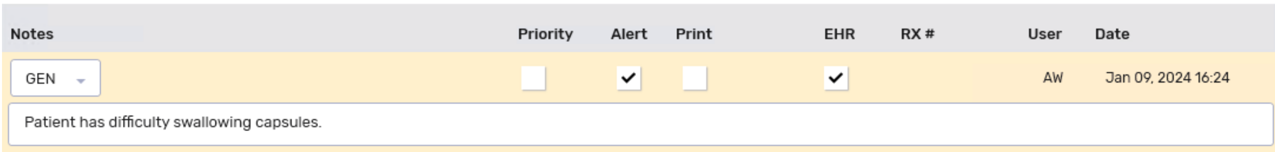
ADDING EXISTING NOTES TO THE EHR

If you want to transmit a note to the patient's EHR, you must select the EHR checkbox.

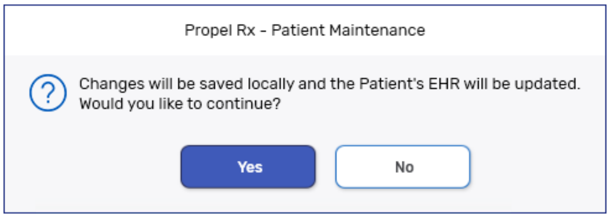
To add an existing patient note to the EHR:

1. Open the **Patient Folder**.
2. Select the **Notes** tab.

3. Select the **EHR** checkbox for the applicable note.



4. A prompt appears to confirm that the note should be saved to the EHR. Select **Yes** to the prompt.



5. Select **Save**.

A processing message displays and closes upon successful transmission of the note to the EHR.

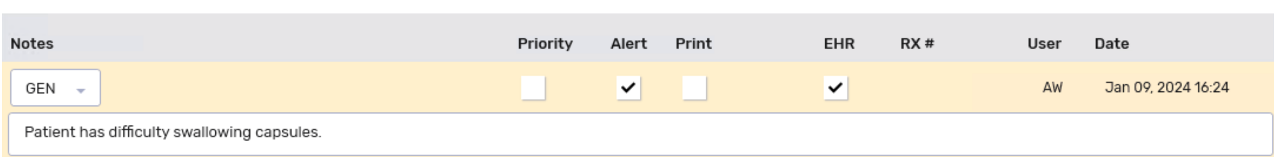
If a Detected Issue is returned by the EHR, appropriate action must be taken before the note can be saved on the EHR.

ADDING NEW NOTES TO THE EHR

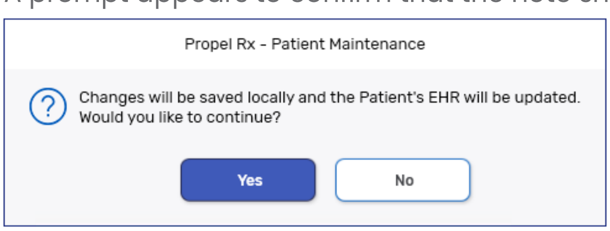
When a new note is added to the Patient Folder, by default, the EHR checkbox is deselected. To transmit the note to the EHR, you must select this checkbox.

To add a new patient note:

1. Open the **Patient Folder**.
2. Select the **Notes** tab.
3. Select **Add** located at the bottom. A new patient note row appears.
4. From the dropdown menu, select the type of note you are entering.
5. Enter your note text. A maximum of 2000 characters can be transmitted.
6. Select the **EHR** checkbox.



7. A prompt appears to confirm that the note should be saved to the EHR. Select **Yes** to the prompt.



8. Select **Save**.

A processing message displays and closes upon successful transmission of the note to the EHR.

If a Detected Issue is returned by the EHR, appropriate action must be taken before the note is saved on the EHR. If an error is returned that cannot be managed using Issue Management, the note is saved locally.

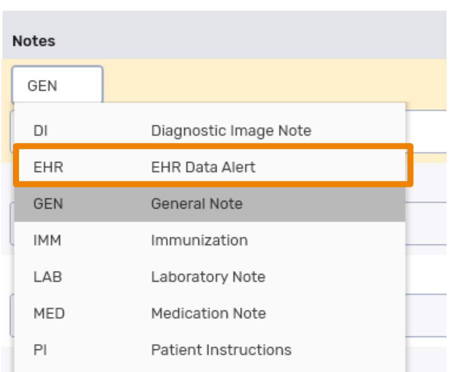
ADDING AN EHR DATA ALERT NOTE

Only upon request by Alberta Health should an EHR Data Alert note can be added to a Patient Folder and transmitted to the EHR. To enter the note, an Alberta Health ticket number is required and will be appended to the transmitted note. Like other patient note types, an EHR Data Alert note cannot be edited after transmission.

NOTE: Only 1 EHR Data Alert note can be entered per patient. If another EHR Data Alert note was added by you or another pharmacy, a Validation Error appears to block you from adding another one.

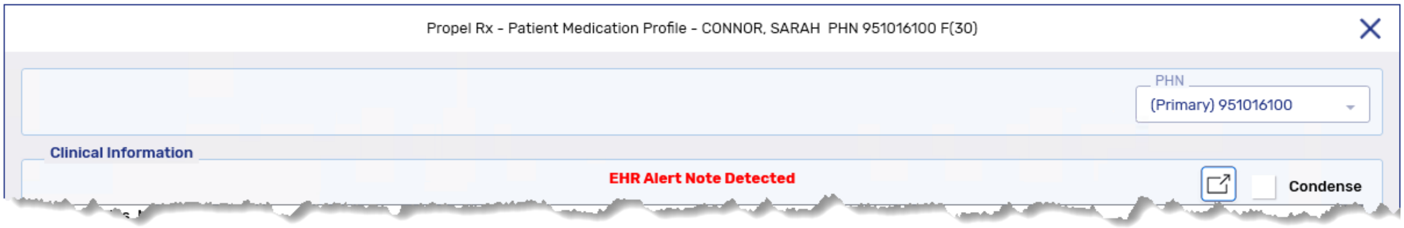
To add an EHR Data Alert note:

1. Open the **Patient Folder**.
2. Select the **Notes** tab.
3. Select **Add** located at the bottom. A new patient note row appears.
4. From the dropdown menu, select the **EHR Data Alert** note type. A prompt appears for you to enter a ticket number.



5. Enter the ticket number provided by Alberta Health in the designated field. This ticket number will be automatically appended to the beginning of the note and transmitted to the EHR.
6. Select **OK**.
7. Enter your note text.
8. Ensure the **EHR** checkbox is selected.
9. Select **Save**.

A processing message displays and closes upon successful transmission of the note to the EHR. On the Patient Medication Profile, an "**EHR Alert Note Detected**" indicator will appear at the top.



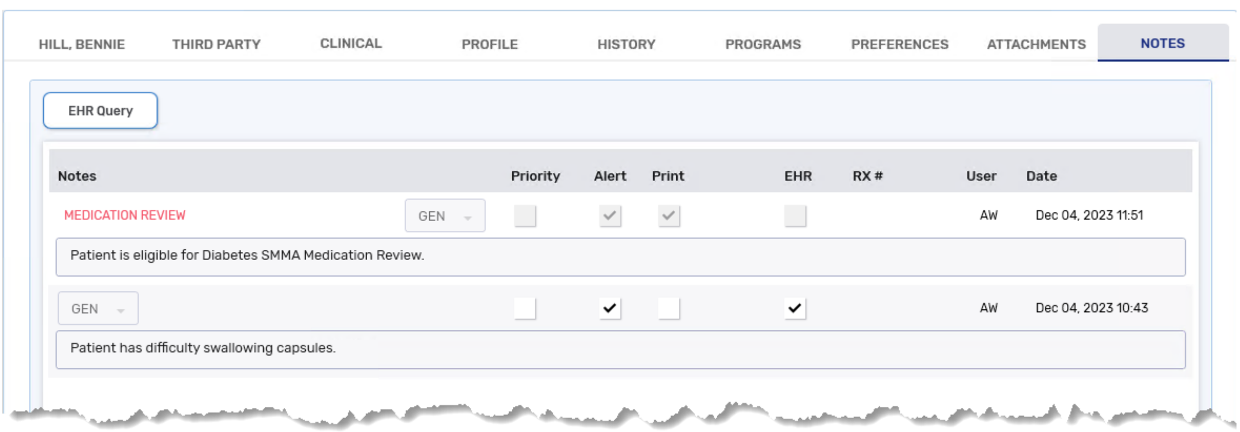
If a Detected Issue is returned by the EHR, appropriate action must be taken before the note is saved on the EHR. If an error is returned that cannot be managed using Issue Management, the note is saved locally.

Retracting Notes From the EHR

If a note was added to a patient's EHR, you can retract the note from the EHR if needed. You cannot retract notes that were added from the Patient Folder Clinical tab from the Notes tab.

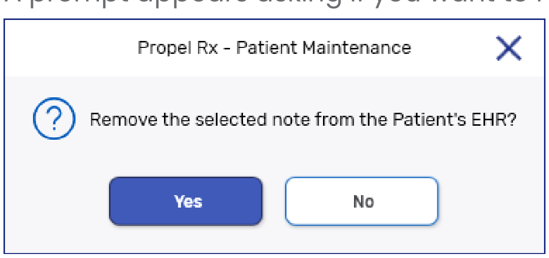
To retract a patient note:

1. Open the **Patient Folder**.
2. Select the **Notes** tab.



3. Do one of the following:
   - If you want to remove the note from Propel Rx and the EHR, highlight the note and select **Delete**.
   - If you want to retract the note from the EHR but keep it locally in Propel Rx, deselect the **EHR** checkbox for the note.

   A prompt appears asking if you want to remove the selected note from the EHR.



4. Select **Yes**.
5. Select **Save**.

A processing message displays indicating the information is being retracted from the patient's EHR. Upon successful retraction, the note is removed from the EHR and if applicable, also from Propel Rx.

Prescriber Folder

The Prescriber Folder allows you to add new or update existing healthcare professional records (e.g., physicians, nurse practitioners, pharmacists, optometrists, etc.) in Propel Rx.

MD Match

When adding new prescribers to your prescriber database, the MD Match button in the Prescriber Search window allows you to search a provincial database of doctors. For each doctor, this database contains an address, license number, and at least one phone number.

NOTE: MD Match is not integrated with the EHR.

If a prescriber cannot be located via MD Match, search the applicable provincial college registry.

TIP: Click on the magnifying glass beside the **License #** field to open the Alberta College of Pharmacy website in your browser.

To use MD Match to locate a doctor:

1. Select the **Prescriber** navigator button on the left. The Prescriber Search window opens.
2. Enter in the prescriber search criteria.
3. Select **Search**.
4. If the doctor is not found, select the **MD Match** button at the bottom. The Master Doctor Search window opens. The search criteria are displayed.
5. Select **Search**.
6. Highlight the correct doctor from the search results.
7. Select **OK**. The Prescriber Folder opens.
8. If required, update the prescriber's information.
9. Select **Save**.

Drug Folder

The Drug Folder contains fields that are submitted to the EHR with each prescription filled. Upon activation of EHR integration, these fields will be set for all drugs in your database automatically.

Drugs can be created centrally or locally.

- **Central drugs** – refers to drugs that are created by Pharmacy Technology Solutions (Independent) or Rexall (Corporate).
- **Local drugs** – refers to drugs that are created free-form by your pharmacy. If a local drug is created after EHR integration, the EHR fields must be set up by your pharmacy.

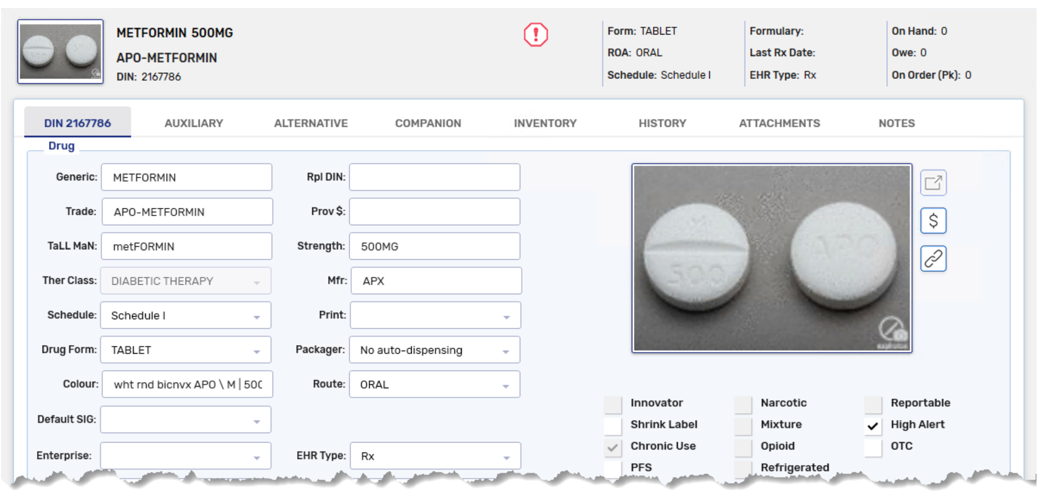
Main Tab

EHR Type

The EHR Type determines if a prescription for the drug is submitted to the EHR or not. This field is always editable in Independent stores and only editable if the drug was created locally in Corporate stores.

- **Rx** – Prescription messages are transmitted to the EHR. This is the assumed EHR Type for locally created drugs upon EHR integration.
- **Non-EHR** – Prescriptions for these types are not transmitted to the EHR.

NOTE: The image below shows how the Drug Folder Main tab looks in an Independent store. Additional fields may be disabled in a Corporate store.



ALERT: The **EHR Type** of Non-EHR should only be used for drugs that do not have a valid DIN/NPN assigned by Health Canada (e.g., PFS).

To update the EHR Type from the Drug Main tab:

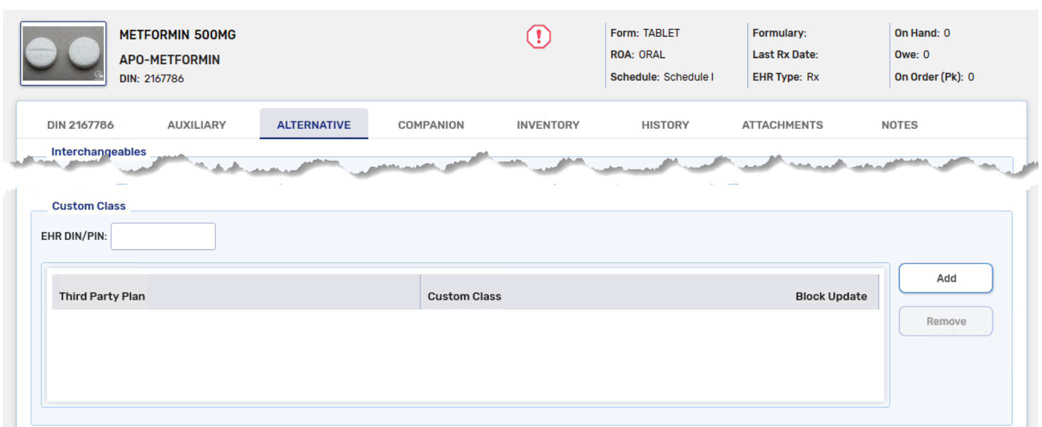
1. Open the **Drug Folder**.
2. Select the **Main** tab.
3. Dropdown the **EHR Type** field and select the appropriate option.
4. Select **Save**.

Alternatives Tab

EHR DIN/PIN

The EHR DIN/PIN field provides a means to submit an alternative DIN/PIN to the EHR. The EHR DIN/PIN entered will transmit in lieu of the DIN assigned to the Drug Folder. This can be used for free-form drugs since they're automatically assigned a negative PIN upon creation, and the EHR only accepts valid DINs/NPNs assigned by Health Canada (excluding drugs entered as mixtures). This field is always editable in Independent stores and only editable if the drug was created locally in Corporate stores.

NOTE: The image below shows how the Drug Folder Alternative tab looks in an Independent store. The Third Party Plan grid below the EHR DIN/PIN is not available in a Corporate store.



To add or update the EHR DIN/PIN from the Drug Alternative tab:

1. Open the **Drug Folder**.
2. Select the **Alternative** tab.
3. Enter the recognized DIN/PIN value for the drug in the **EHR DIN/PIN** field.
4. Select **Save**.

NOTE: If a free-form drug represents a purchased compound and there is no valid DIN/NPN that can be entered in the EHR DIN/PIN field, you can enter 999999 as the EHR DIN/PIN. Alternatively, you can enter the purchased compound as an ingredient in a mixture, or a new mixture can be created for it to successfully transmit to the EHR.

Mixture Folder

The Mixture Folder contains fields that are submitted to the EHR with each prescription filled. Upon activation of EHR integration, these fields will be set for all mixtures in your database automatically.

Mixtures can be created centrally or locally.

- **Central mixtures** - refers to mixtures that are created by Rexall. This is only applicable to Corporate stores.
- **Local mixtures** – refers to mixtures that are created free-form by your pharmacy. If a mixture was created locally after EHR integration, the EHR fields must be set by your pharmacy.

Main Tab

Name

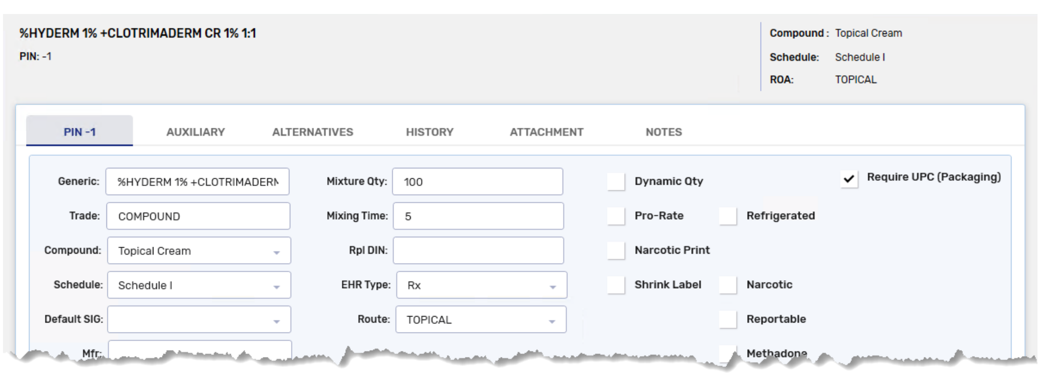
The name of the mixture is submitted with the EHR Prescription message. Methadone will automatically be included in the EHR message if the Methadone checkbox is selected in the Mixture Folder.

EHR Type

The EHR Type selection determines if a prescription for the mixture is transmitted to the EHR or not. This field is always editable in Independent stores and only editable if the mixture was created locally in Corporate stores.

- **Rx** – Prescription messages are transmitted to the EHR. This is the assumed EHR Type for locally created mixtures upon EHR integration.
- **Non-EHR** – Prescriptions for these types are not transmitted to the EHR.

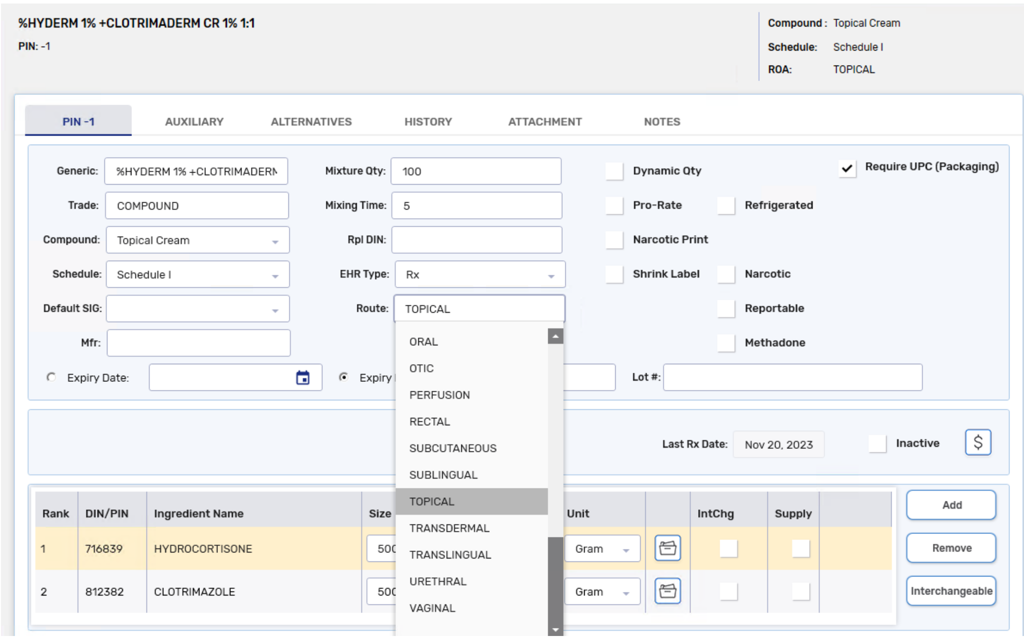
NOTE: The image below shows how the Mixture Main tab looks in an Independent store. Additional fields may be disabled in a Corporate store.



Route

A mixture's Route of Administration is transmitted within the EHR Prescription message.

NOTE: The image below shows how the Mixture Main tab looks in an Independent store. Additional fields may be disabled in a Corporate store.



To modify the Route in the Mixture Folder:

1. Open the **Mixture Folder**.
2. In the **Main** tab, select the **Route** from the dropdown list.
3. Select a value that is appropriate for the mixture (e.g., Topical).
4. Select **Save**.

Alternatives Tab

EHR DIN/PIN

The **EHR DIN/PIN** field is in the Mixture Folder Alternatives tab. The EHR DIN/PIN entered will transmit in lieu of the PIN assigned to the Mixture Folder. If this field is left blank, no DIN/PIN will be transmitted and a description of the mixture containing the name, form, strength, quantity, and unit of each ingredient will be sent instead. This field is always editable in Independent stores and only editable if the mixture was created locally in Corporate stores.

NOTE: The image below shows how the Mixture Folder Alternative tab looks in an Independent store. The Third Party Plan grid below the EHR DIN/PIN is not available in a Corporate store.

SUBMITTING PRE-MADE MIXTURES TO THE EHR

If you purchase pre-made mixtures from another pharmacy, you may have created a freeform Drug Folder for the mixture. For instructions on creating the Drug Folder, see Handling Pre-Made Mixtures.

For the Drug to be accepted by the EHR, you must set the following in the Drug Folder:

- **EHR Type** = Rx
- **EHR DIN/PIN** = DIN of the eligible active ingredient with the highest total cost. If there is no valid DIN/NPN, enter 999999.

If you are submitting the prescription to a third party plan and they require a compound flag to be transmitted, you can create a Mixture Folder using the freeform Drug Folder as the only ingredient. For instructions on creating the Mixture Folder, see Handling Pre-Made Mixtures.

The **EHR DIN/PIN** for the Mixture Folder may be entered as outlined above but it is not required.

Filling a Prescription

All drugs dispensed for a real DIN, NPN, or compound **must** be added to the patient's EHR before it can be submitted online to Third Party payers for payment. Whether a drug is transmitted to the EHR is determined by the setup in the [Drug Folder]() or [Mixture Folder](). The EHR captures all prescriptions, including cash prescriptions. A prescription may also be downloaded from the patient's EHR and then filled.

There are 2 types of prescriptions that can be accepted by the EHR: inferred and non-inferred. In most cases, a prescription will be inferred, meaning the EHR infers the prescription from a pharmacy dispense, and a Create message is not sent by the pharmacy. A prescription is non-inferred if it was prescribed by a pharmacist, in which case, the Create along with the Dispense messages are sent by the pharmacy.

When a prescription is processed, the **Patient Medication Profile** will automatically display in Rx Detail if it hasn't already been viewed in the past 2 hours for the patient. This forced view will not occur when a prescription is detailed. For more information, see [Forced Viewing of a Patient EHR Profile](). If the patient is not synced, the patient's local Profile always displays when processing a prescription.

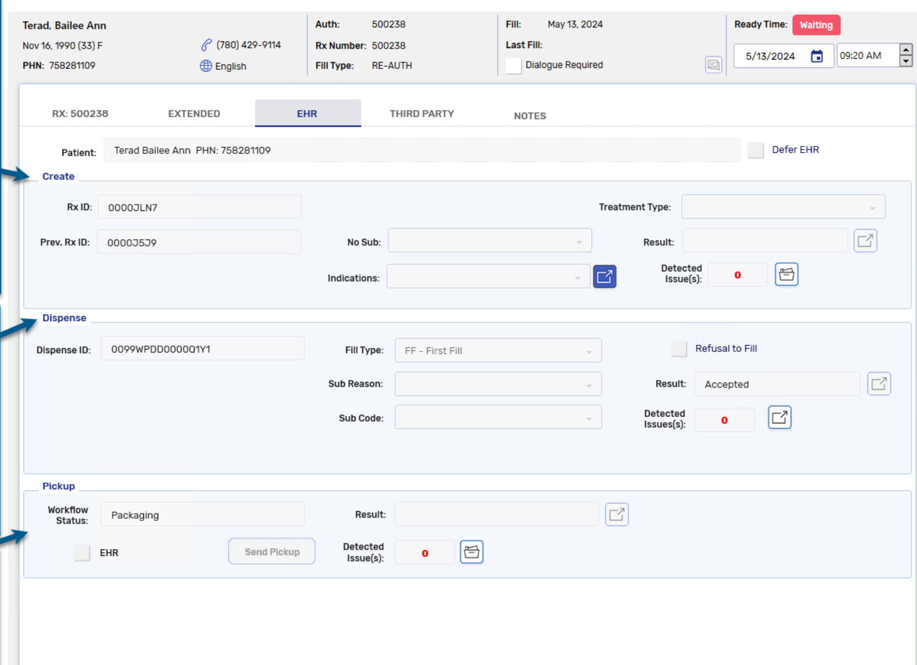
EHR Tab

The **Rx Detail EHR** tab indicates the EHR information associated with 3 Prescription messages: Create, Dispense, and Pickup.

Create
Contains information pertaining to the prescription as it was prescribed. This section is read-only unless the prescription was prescribed by a pharmacist. The Rx ID is assigned to the first prescription filled from an authorization and carries forward to all refills. The Prev. Rx ID is the Rx ID of the previous authorization in the same chain, if it exists; this is blank for refills.

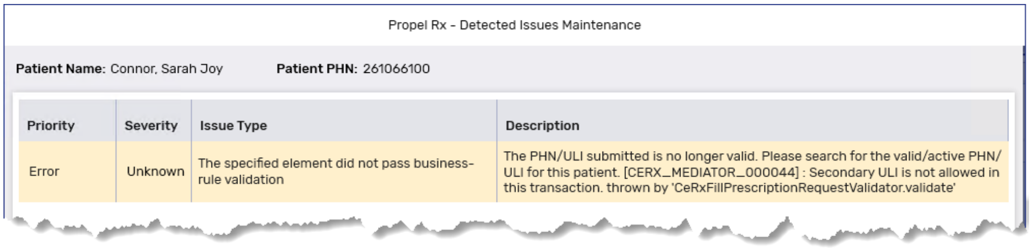
Dispense
Contains information pertaining to the fill of the prescription. A Dispense ID is assigned for each dispense transmitted to the EHR. The Fill Type is either First Fill or Refill. The Sub Reason and Sub Code can be selected if you want to provide rationale for changing a drug.

Pickup
Contains information pertaining to the pickup of the prescription.



Filling a Prescription With a Secondary PHN

A patient must be synced with their primary PHN for prescriptions to be transmitted to the EHR. If a patient is synced with their secondary PHN, upon filling the prescription, a Detected Issue will be returned from the EHR, and the prescription will not be transmitted. Please note, the same Detected Issue appears if any attempts to transmit information to the EHR are made (e.g., clinical information, inactivating prescriptions).


Propel Rx - Detected Issues Maintenance

Patient Name: Connor, Sarah Joy **Patient PHN:** 261066100

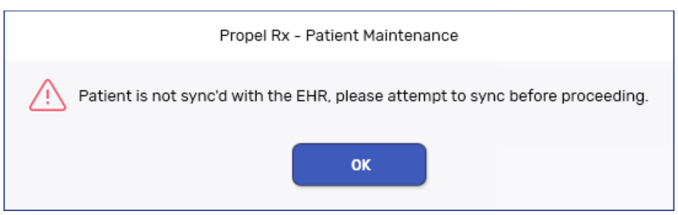
Priority	Severity	Issue Type	Description
Error	Unknown	The specified element did not pass business-rule validation	The PHN/ULI submitted is no longer valid. Please search for the valid/active PHN/ULI for this patient. [CERX_MEDIATOR_000044] : Secondary ULI is not allowed in this transaction. thrown by 'CeRxFillPrescriptionRequestValidator.validate'

When processing a prescription, there are 2 methods to resync the patient:

- ***RECOMMENDED*** From Rx Detail, open the Patient Folder and complete the steps in Unsyncing and Resyncing a Patient. Upon selecting OK in the Patient Folder, the Patient Medication Profile will automatically display in Rx Detail.
- From another instance or workstation, open the Patient Folder and complete the steps in Unsyncing and Resyncing a Patient. After selecting OK in the Patient Folder, select the Revert button in Rx Detail to automatically display the Patient Medication Profile.

Filling a Prescription for an Unsynchronized Patient

If a prescription is filled for an unsynchronized patient, a prompt appears in Rx Detail once per patient, per day. This prompt will block you from processing the prescription until you attempt to sync the patient.



To qualify as a sync attempt, at minimum, you must select the PHN expander button in the Patient Folder. If you attempted to sync the patient but it was unsuccessful, you can proceed with filling the prescription. The prompt will not appear again for that patient till the next day. For information on how to sync a patient, see Synchronization Scenarios.

NOTE: This section does not apply to patients that have an Animal, Doctor Office, Pharmacy, or Caregiver status. For more information, see Patient Status.

Filling a Prescription That Already Exists on the EHR

If you're processing a new prescription for which a First Fill already exists on the EHR (e.g., dispensed by another pharmacy), you have the following options:

- Escape out of the current prescription and then download the prescription from the EHR and dispense it. A download may be performed if the prescription was transferred to your pharmacy, or the prescription was written by a pharmacist from another location. For more information, see Transferring In a Prescription.
- Update the status of the prescription on the EHR and then continue dispensing your current prescription. A new prescription will be created on the EHR. For more information, see Updating a Prescription Status on the EHR.

Filling a Prescription Using Fill and Queue Buttons

When a paper prescription is transcribed and filled, Propel Rx transmits the Dispense message to the EHR. This updates the prescription on the patient's EHR with the dispense information.

To fill or refill a prescription:

1. Process the prescription from the **Intake** window or **Patient Profile** until it reaches **Rx Detail**.
2. Enter any required information in the **Main** tab of Rx Detail.
3. *Optional* – Select the **EHR** tab to specify a **Sub Reason** and/or **Sub Code** for the dispense.
    - **Sub Reason** – rationale for dispensing the drug (e.g., Continuing Therapy, Out of Stock).
    - **Sub Code** – category for the drug (e.g., Formulary, Generic, Therapeutic).
4. Once done, select **Fill** or **Queue**. The Dispense message is transmitted to the EHR.

For New and ReAuth prescriptions, in the EHR tab, the **Create** section shows the Rx ID for the authorization, which is carried over for refills. The **Dispense** section shows the Dispense ID for that fill.

The patient's local Profile displays a prescription status of **Complete** (**COM**).

NOTE: When filling methadone prescriptions, the Rx > Methadone window can be used to specify ingestion dates and the number of doses if applicable. For more information, see Methadone Prescriptions.

Filling a Prescription From Auto Refill, IVR, or Web Refill

When EHR integration is turned on, the **Background IVR, Auto Refill, Web Refill** preference is disabled and turned off in Pharmacy Preferences. This is to ensure the Patient Medication Profile is reviewed prior to any clinical interactions. As a result, prescriptions from IVR, Auto Refill, or Web Refill (diem health, Be

Well™) will not be background processed and instead be placed in the Data Entry queue for manual processing.

To fill a prescription from Auto Refill, IVR, or Web Refill:

1. Ensure the **Data Entry** queue is selected on the **Workflow** Workbench.
2. Locate and select the prescription from the Workflow prescription grid.
3. Select **Process**. The Intake window opens.
4. Review the information in the Intake window.
5. Select **Process**. The prescription opens in Rx Detail.
6. *Optional* – Select the **EHR** tab to specify a **Sub Reason** and/or **Sub Code** for the dispense.
    a. **Sub Reason** – rationale for dispensing the drug (e.g., Continuing Therapy, Out of Stock).
    b. **Sub Code** – category for the drug (e.g., Formulary, Generic, Therapeutic).
7. Once done, select **Fill** or **Queue**. The Record Dispense message is transmitted to the EHR.

Filling a PFS Prescription

Patient-Focused Services (PFS) such as Medication Reviews, trials, COVID-19/flu injections, etc. can be billed as prescriptions from within Propel Rx. Unlike IVR, Auto Refill, and Web Refill prescriptions, PFS prescriptions are auto-processed once the service is complete, as the service likely entailed a review of the patient's EHR Profile. No EHR transmission would occur for these prescriptions as the PFS Drug Folders will be marked as non-EHR. For more information on billing PFS prescriptions, see Patient-Focused Service (PFS).

NOTE: COVID-19 and flu injection prescriptions are billed using PINs instead of real DINs. As a result, these prescriptions are not submitted to the EHR.

Pharmacist Prescribing

When a pharmacist prescribes a medication, which includes initial access, adaptations, and extensions, the authorization continues to be paper-based, same as the current process, even though the prescription is transmitted to the EHR. When a new or reauthorized prescription is filled or placed on Hold and the prescriber is a pharmacist:

- A Create message is sent to the EHR if the user processing the prescription is also the pharmacist who prescribed the medication. In all other scenarios where the processing user is not the prescriber, no Create message will be sent and the prescription will be inferred instead.
- If the prescription was a reauthorization, the EHR automatically discontinues the previous prescription once the new authorization is transmitted. This does not apply if the previous prescription was submitted via a Netcare Batch.

Prescribing and Dispensing a Medication

The process to Prescribe and Dispense a medication is the same as an inferred prescription except the Create section in the Rx Detail EHR tab is enabled for new and reauthorized prescriptions if the user processing the prescription is also the prescriber. This includes initial access prescribing, adaptations, and extensions.

To Prescribe and Dispense a medication:

1. Process the prescription from the **Intake** window or **Patient Profile** until it reaches **Rx Detail**. If entering a new prescription or adaptation, ensure you select yourself as the prescriber.

   NOTE: For extensions, Propel Rx automatically selects the pharmacist as the prescriber.

2. Enter any required information in the **Main** tab of Rx Detail.
3. If the user processing the prescription is also the prescriber, complete the following steps. Otherwise, skip to step 4.
   a. Select the **EHR** tab.
   b. In the **Create** section, specify the following:
      - **Treatment Type** – Acute or Chronic (default). For Trial prescriptions, only Chronic is accepted.
      - **No Sub** – select a reason for choosing the medication if you, the prescriber, wants to indicate no substitution. By default, a blank entry means the prescriber/pharmacist allows substitutions.
      - **Indications** – choose the indication (aka Purpose for Use) for the drug from the dropdown and/or select the expander button to enter a free-form description. Up to 2000 characters can be entered. The indication can be viewed from the EHR Profile by detailing the prescription. <u>The Indication, Treatment Type, and No Sub fields are not carried over to reauthorizations</u>.

   ALERT: The indication is required to fill the prescription if the user processing the prescription is also the prescriber. If the indication is not entered, a prescription will not auto-process in the background or in a batch.

   TIP: If the wrong dropdown value was selected for the indication, click on the dropdown and press **Delete** on your keyboard to clear the field.

4. Once done, select **Fill** or **Queue**. The Create (if applicable) and Dispense messages are transmitted to the EHR.

In the EHR tab, the **Create** section shows the Rx ID for the authorization, which is carried over for refills. The **Dispense** section shows the Dispense ID for that fill.

Prescribing a Medication but not Dispensing

The process to Prescribe a medication but not Dispense it is the same as placing an inferred prescription on Hold except the Create section in the Rx Detail EHR tab is enabled for new and reauthorized prescriptions if the user processing the prescription is also the prescriber.

NOTE: As per current functionality, when using the Extend functionality, the prescription cannot be placed on Hold.

A Prescribed prescription may be placed on Hold if for example, the patient wants to fill the prescription at another pharmacy, or the pharmacy is planning on dispensing it at a later point. In the case whereby the patient needs to get it dispensed elsewhere, the pharmacy would need to first print the prescription, sign it, and mark it as transferred out in Propel Rx to ensure it is not dispensed by accident. When transferring out the prescription, the receiving pharmacy's information may be mocked, as a true transfer is not occurring. For more information, see Transferring Out a Prescription.

To Prescribe a medication and place it on Hold:

1. Process the prescription from the **Intake** window or **Patient Profile** until it reaches **Rx Detail**. If entering a new prescription or adaptation, ensure you select yourself as the prescriber.

   NOTE: For extensions, Propel Rx automatically selects the pharmacist as the prescriber.

2. Enter any required information in the **Main** tab of Rx Detail.
3. If the user processing the prescription is also the prescriber, complete the following steps. Otherwise, skip to step 4.
   a. Select the **EHR** tab.
   b. In the **Create** section, specify the following:
      - **Treatment Type** – Acute or Chronic. For Trial prescriptions, only Chronic is accepted.
      - **No Sub** – select a reason for choosing the medication if you, the prescriber, wants to indicate no substitution. By default, a blank entry means the prescriber/pharmacist allows substitutions.
      - **Indications** – choose the indication (aka Purpose for Use) for the drug from the dropdown or select the expander button to enter a free-form description. Up to 2000 characters can be entered. The indication can be viewed from the EHR Profile by detailing the prescription. The indication is not carried over to reauthorizations.

   ALERT: The indication is required to place the prescription on Hold if the user processing the prescription is also the prescriber. If the indication is not entered, a prescription will not auto-process in the background or in a batch.

TIP: If the wrong dropdown value was selected for the indication, click on the dropdown and press **Delete** on your keyboard to clear the field.

4. Once done, select **Hold**. If applicable, the Create message is transmitted to the EHR.

In the EHR tab, the **Create** section shows the Rx ID for the authorization, which is carried over for refills.

Dispensing a Medication but not Prescribing

The process to Dispense a medication that was prescribed by a pharmacist from another pharmacy is the same as an inferred prescription. No Create message is sent as the act of prescribing did not occur at your pharmacy.

If a patient chooses to dispense a pharmacist prescribed medication at another pharmacy, the prescription may already be entered in the patient's EHR Profile by the originating pharmacy. If this is the case, download the prescription from the EHR to fill it. If you entered a new prescription in error, refuse and remove it, and then process the existing prescription. For more information, see Transferring in a Prescription. Only enter a new prescription if the prescription on the EHR cannot be downloaded (i.e., prescription was transmitted via Netcare Batch).

ALERT: You must obtain the physical authoritative prescription from the patient unless it has already been dispensed. If it has already dispensed at another pharmacy, you can transfer in the prescription.

Printing a Prescribed Prescription

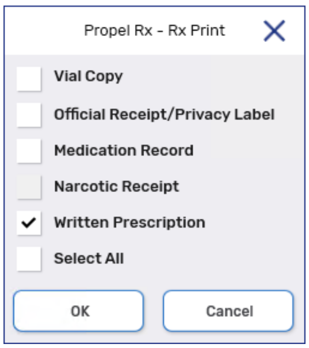
If a medication was prescribed by a pharmacist at your pharmacy, a copy of the prescription can be printed in English on a Half or thermal label. This can be generated at any time and the information on it will not change. This may be useful in situations when you need to provide the authorized prescription or a copy to the patient. If providing an authorized prescription, ensure that it is signed, and the prescription is transferred out. If providing a copy to the patient, it is recommended that you write "Copy" on it.

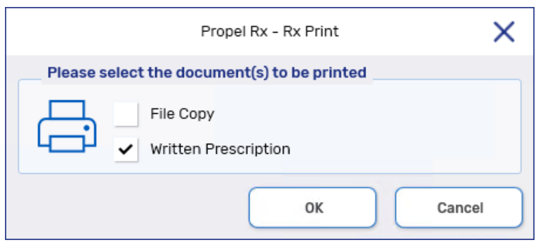
It is recommended to scan and attach the printed prescription, especially for initial access prescribing. However, the existing documentation for adaptations and extensions are attached automatically and can continue to be leveraged as the written prescription.

TIP: By default, the prescription copy is printed from the same printer as the Adaptation form. You can change the printer settings if desired from **More (...)** > **Pharmacy** > **System** > **Prescription Copy – AB**.

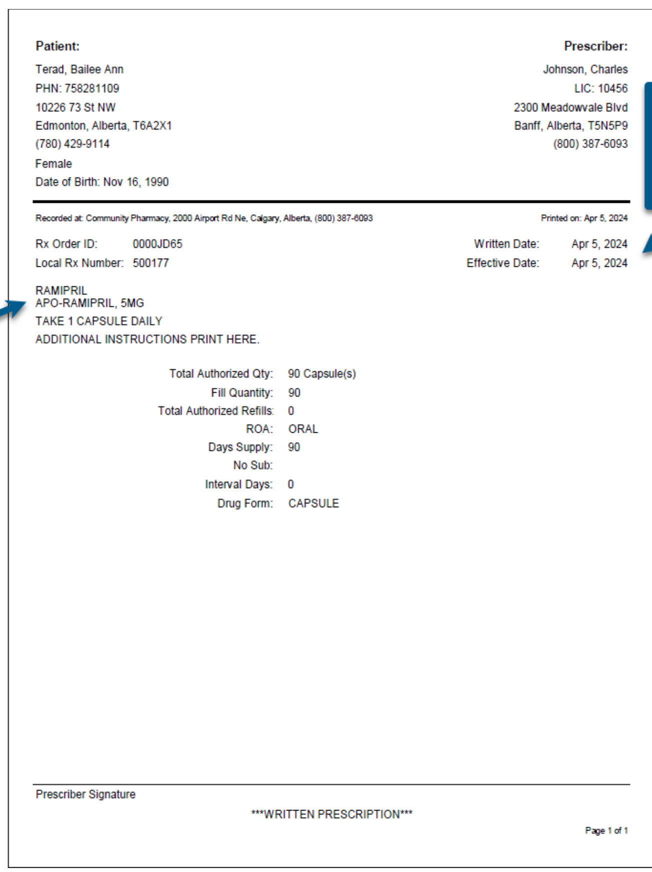
To print a copy of the prescription:

1. On the **Patient Profile**, select one or more prescriptions.
2. Select **Rx** > **Print**.
3. Select the **Written Prescription** checkbox. The prompt that displays depends on your Label Type setting.





4. Select **OK**.



Patient:
Terad, Bailee Ann
PHN: 758281109
10226 73 St NW
Edmonton, Alberta, T6A2X1
(780) 429-9114
Female
Date of Birth: Nov 16, 1990

Prescriber:
Johnson, Charles
LIC: 10456
2300 Meadowvale Blvd
Banff, Alberta, T5N5P9
(800) 387-6093

Recorded at: Community Pharmacy, 2000 Airport Rd Ne, Calgary, Alberta, (800) 387-6093
Printed on: Apr 5, 2024

Rx Order ID: 0000JD65
Local Rx Number: 500177
Written Date: Apr 5, 2024
Effective Date: Apr 5, 2024

RAMIPRIL
APO-RAMIPRIL, 5MG
TAKE 1 CAPSULE DAILY
ADDITIONAL INSTRUCTIONS PRINT HERE.

Total Authorized Qty:	90 Capsule(s)
Fill Quantity:	90
Total Authorized Refills:	0
ROA:	ORAL
Days Supply:	90
No Sub:	
Interval Days:	0
Drug Form:	CAPSULE

Prescriber Signature

WRITTEN PRESCRIPTION

Page 1 of 1

The Effective Date will always match the Written Date.

For mixtures, all ingredient names, strengths, quantities, units, and forms are listed.

Refilling a Prescription That Doesn't Exist on the EHR or Was Sent Via Netcare Batch

In some situations, you may refill a prescription that does not have a Rx ID on the EHR. This can happen when:

- Your store first activates EHR integration. Prescriptions that were sent via Netcare Batch will exist on the EHR but have no assigned Rx IDs.
- Prescriptions were processed for an unsynchronized patient and the patient is synchronized afterwards.

When you refill a prescription without a Rx ID, a new inferred prescription will be created on the EHR. A Rx ID will be assigned to the refill, and the quantity authorized (QA) on the EHR will reflect the quantity remaining on the prescription and not the original QA in Propel Rx.

NOTE: When your store goes live with EHR integration, it is expected that there may be duplicate prescriptions on the EHR Profile, since some of those prescriptions were added to the EHR via Netcare Batches (indicated with an icon). While not necessary, you can update the status of the Netcare Batch prescriptions on the EHR; once these prescriptions are no longer deemed clinically relevant by the EHR, they will not appear on the EHR Profile.

Placing a Prescription on Hold

When a paper prescription is transcribed and put on Hold for a patient, it is not transmitted to the patient's EHR. Transmission will occur when the prescription is refilled.

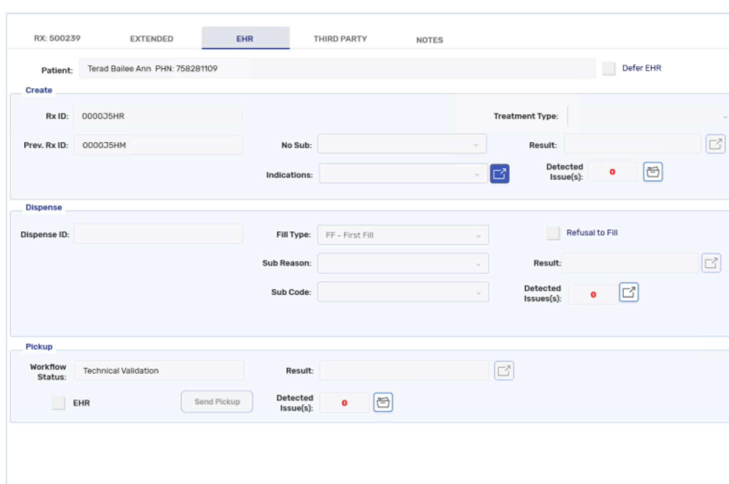
NOTE: The exception to this is pharmacist prescribed prescriptions which transmit when placed on Hold.

To place a prescription on Hold:

1. Process the prescription from the **Intake** window or **Patient Profile** until it reaches **Rx Detail**.
2. Select **Hold**.

In the EHR tab, the **Create** and **Dispense** sections will display no responses in the Result fields.

The Patient Profile in Propel Rx displays the prescription with a status of **Hold** (**HOL**).



Using the Additional Instructions Function

When longer instructions are required for a prescription than can fit in the Rx Detail SIG field, you can use the Additional Instructions function. Instructions entered in the Additional Instruction Label window are transmitted to the EHR and print on a separate vial label from the instructions entered in the Rx Detail SIG field.

To use the Additional Instructions function:

1. Open the incomplete prescription in Rx Detail.
2. Select **Rx** > **Add'l Instructions**. The Additional Instruction Label window opens.
3. Enter the instructions in the Additional Text section.

4. Select **OK**.
5. Continue to fill the prescription as usual.

Deferring EHR Submission for Prescriptions

If you need to process a prescription but there are errors that you cannot resolve now (e.g., new drug is not recognized, technical errors, etc.), you can use the **Defer EHR** functionality.

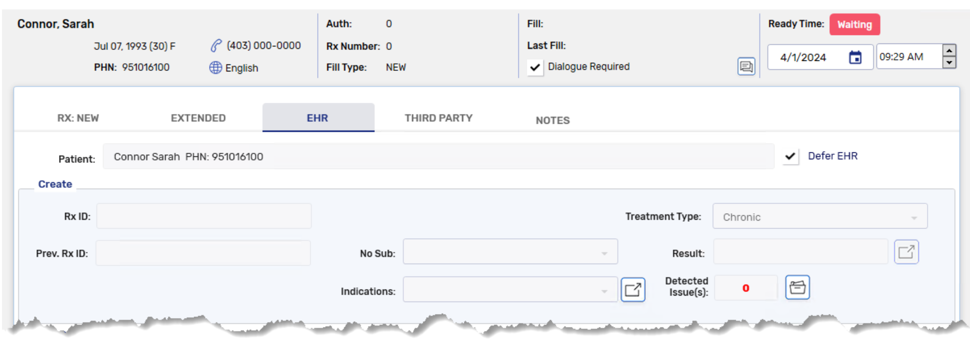
Defer EHR functionality allows you to temporarily bypass the EHR for prescriptions but adjudicate to the Third Parties. The Deferred prescriptions are added to the EHR Queue, and you are responsible for sending the applicable EHR transactions at the appropriate time.

Any future EHR transactions associated with the prescription (e.g., Record Notes, Dispense Pickup, Reversals, etc.) are added to the EHR Queue and have an EHR Queue Status of **Deferred** until the Deferred prescription is processed.

NOTE: It is possible to have Deferred records for an unsynced patient in the EHR Queue. This does not apply to patients that have an acceptable non-EHR patient status.

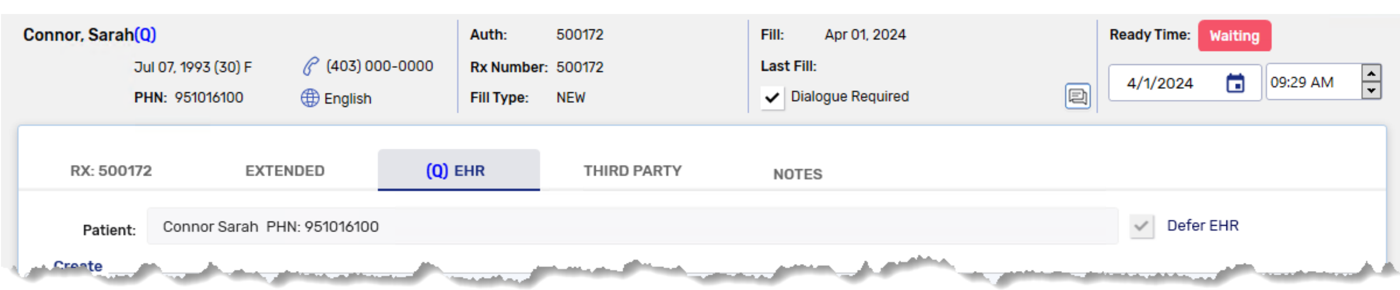
To defer the EHR submission for a prescription:

1. Process the prescription from the **Intake** window or **Patient Profile** until it reaches **Rx Detail**.
2. Select the **EHR** tab.
3. Select the **Defer EHR** checkbox.



4. Select **Fill**.

The Deferred prescription is indicated with a **[Q]** indicator in Rx Detail. A **[Q]** indicator also displays on the Patient Folder information bar when the patient has transactions currently in the EHR Queue. This acts as a reminder for you to deal with the pending prescriptions.



Refilling or Reauthorizing Deferred EHR Prescriptions

When the **Defer EHR** checkbox is turned ON for the previous prescription, refills and reauthorizations also have the Defer EHR checkbox turned ON and disabled until the previous record is submitted successfully to the EHR. The Deferred prescriptions remain in the EHR Queue until actioned.

Correcting a Prescription

The Correct function allows you to fix errors (e.g., wrong quantity, drug, instructions) on a prescription that was processed by your pharmacy. Depending on the prescription and the Correct function used, a corresponding message may be transmitted to retract or reverse the prescription from the EHR. A retraction removes the prescription completely from the EHR while a reversal displays as aborted on the EHR.

NOTE: There is no time limit to retract a prescription from the EHR, unless the prescriber was a pharmacist. For pharmacist prescribed medications, the prescription must be retracted by midnight on the day it was entered, by the user who entered it.

Amend Allows you to make changes to a processed prescription without impact to billing. These changes are not transmitted to the EHR.

Amend Next Allows you to make changes for the next refill of a prescription. Once Amend Next is completed, the prescription number changes to 0. These changes are not transmitted to the EHR until the prescription is processed (e.g., dispensed).

Rebill Allows you to cancel a prescription, correct it, and then fill the prescription in one step using the same prescription number and same Fill Date (e.g., incorrect quantity authorized).

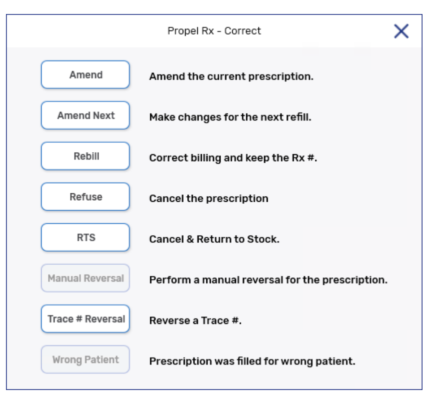
Refuse Allows you to cancel the prescription (e.g., prescription filled in error).

RTS Allows you to cancel the prescription. RTS allows you to enter the prescription numbers by scanning privacy labels.

Manual Reversal Disabled for EHR integrated pharmacies.

Trace # Reversal Allows you to reverse a claim from a Third Party using a unique trace number.

Wrong Patient Disabled for EHR integrated pharmacies.



Amending a Prescription

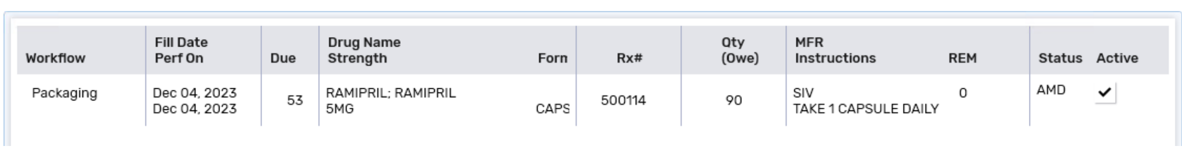
Since changes made using the Amend function are not transmitted to the EHR, only certain prescription fields can be edited with an Amend. All other fields will be disabled. Refer to the lists below for the fields that can be amended in Rx Detail.

Main Tab	Extended Tab
• Labels • Refill Rem Days (Independent stores only) • Compliance Pack checkbox and dosing information	• Label setup • Language • Next Fill Qty • Special Auth Expiry • Auto Refill and Leaflet checkboxes

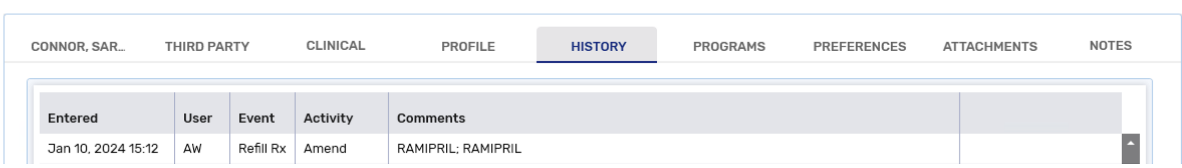
To amend a prescription:

1. From the **Patient Profile** or **Workbench**, highlight the completed prescription.
2. Select **Correct**. The Correct window opens.
3. Select **Amend**. The prescription opens in Rx Detail.
4. Make the necessary edits in the allowed fields.
5. Select **Save**.
6. A prompt asks if you want to print a new vial label. Select **Yes** or **No**.

On the Patient Profile, the prescription's status is updated to AMD to reflect that it was amended.



In Patient History, a record is added indicating the user who performed the action and when it occurred.



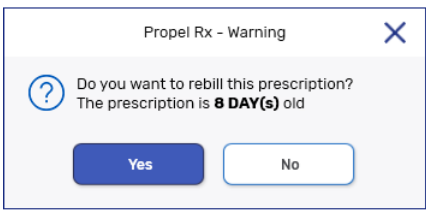
Rebilling a Prescription

When a prescription is rebilled, the prescription is first refused and then filled again. During the refusal portion of a rebill, retractions or reversals are sent sequentially to the EHR for the Pickup and Dispense portions of a prescription. For new and reauthorized prescriptions prescribed by a pharmacist, the Create is also retracted on a rebill. After the prescription is filled, the Pickup will retransmit as per usual Workflow process. For more information on Pickups, see Picking Up a Prescription.

To rebill a prescription:

1. Do one of the following:
   - From the **Workbench** or **Patient Profile**, highlight the completed prescription(s). Select **Correct** > **Rebill**.
   - From **Rx Detail**, select **Correct** > **Rebill**.
   - From the **Claim Summary** window, select **Rebill**.

   A prompt appears.

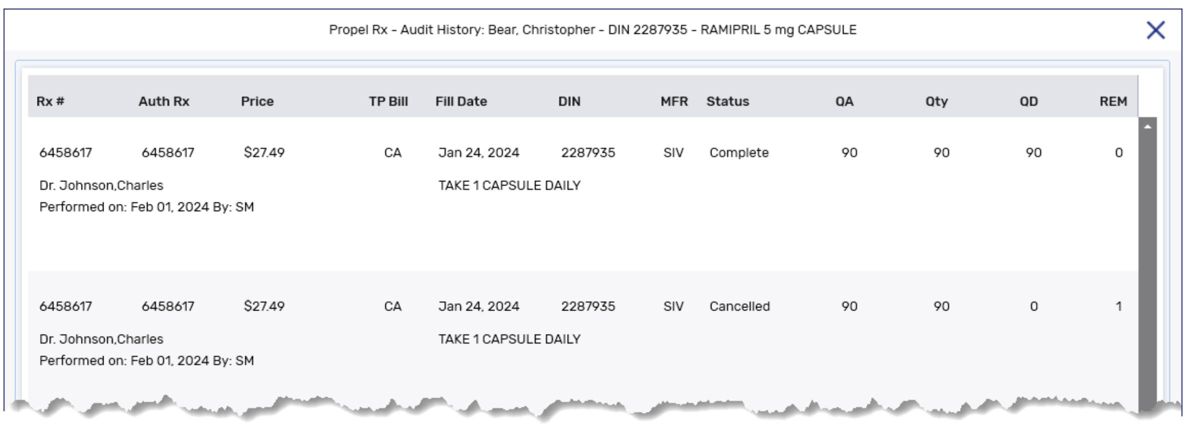
2. Select **Yes**. Propel Rx reverses the Third Party claim, and the appropriate reversal message is sent to the EHR. For detailed information on the prescription changes that occur on the EHR with a rebill, refer to the table below.
3. Select **Fill**.

Prescription Scenario	Prescription Changes on the EHR
New or reauthorized inferred prescription (including first fill from Hold)	• Prescription is removed from the EHR if no other dispenses were recorded against the prescription. It may be automatically discontinued by the EHR if there were no dispenses but there were actions recorded against it (e.g., status changes). • On fill, a new prescription is added to the EHR.
New or reauthorized non-inferred (pharmacist prescribed) prescription (including first fill from Hold)	• Prescription is removed from the EHR. If the Create cannot be retracted successfully, the prescription is discontinued on the EHR instead. • On fill, a new prescription is added to the EHR.
Refill	• Dispense is reversed from the EHR. If a Pickup was previously completed, it is retracted. Prescription remains on the EHR.

	• On fill, a new Dispense with the same EHR Rx ID is added to the EHR.
Downloaded prescription from the EHR	• Dispense is reversed from the EHR. If a Pickup was previously completed, it is retracted. • On fill, the EHR Rx ID is retained.

In Propel Rx, the prescription status is updated to Complete, and the same prescription number is assigned. All successful prescription rebills are recorded in the Patient Folder History tab, as shown below.

The Audit History for the prescription also accurately tracks the refusal and fill, as shown below.



Refusing a Prescription

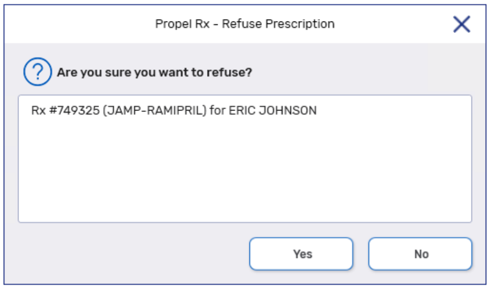
When a prescription is refused, retractions or reversals are sent sequentially to the EHR for the Pickup, Dispense, and in some cases, Create portions of a prescription. Evidence of the refusal is recorded in the prescription's Audit History.

To refuse a prescription:

1. Do one of the following:
   - From the **Patient Profile** or **Workbench**, highlight the prescription(s). Select **Correct** > **Refuse**.
   - From **Rx Detail**, select **Correct** > **Refuse**.

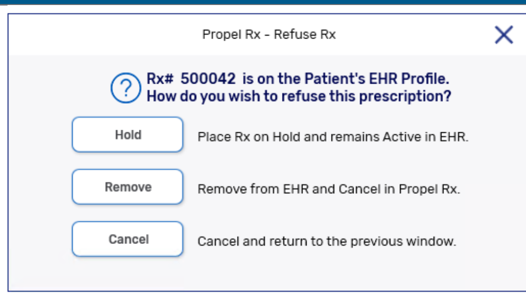
- From the **Claim Summary** window, select **Refuse**.
- From the **Batch Profile** window, highlight the prescription(s) and select **Refuse**.

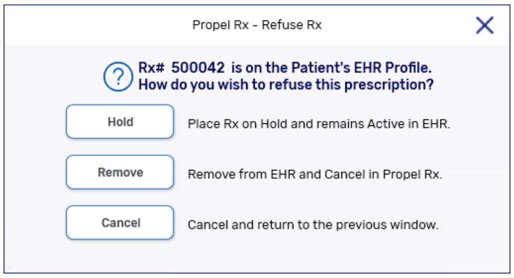
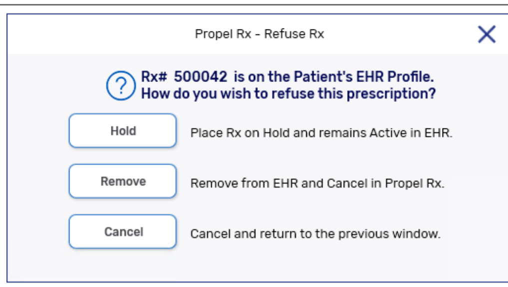
A validation prompt appears.

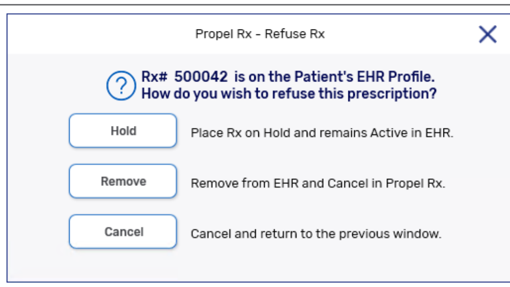


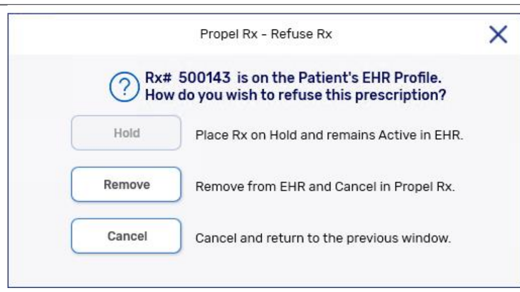
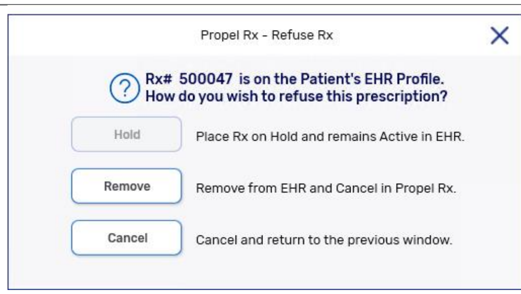
2. Select **Yes**. The Refuse Rx window opens. Depending on the prescription scenario, the buttons that are visible in the window vary, as indicated in the chart below.

NOTE: The **Remove** option in the Refuse Rx window mentions the prescription will be removed from the EHR. However, this will only occur when possible and not in every case.

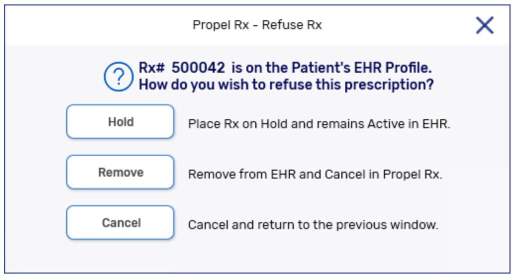
Prescription Scenario	Prompt	Options/Actions
New inferred prescription (including first fill from Hold)		**Hold** • Reverses the claim from the Third Party. • Prescription is cancelled and has a *Hold* status locally. • Dispense is reversed on the EHR. If a Pickup was previously completed, it is also retracted. The prescription remains on the EHR. On subsequent fill, a Dispense will be added to the EHR with the same EHR Rx ID. **Remove** • Reverses the claim from the Third Party. • Prescription is removed locally. For a first fill from Hold, only the first fill is removed; the Hold is not removed. • Prescription is removed or discontinued on the EHR. On

		subsequent fill, a new prescription is added to the EHR. **Cancel** • Exits with no changes.
ReAuth of an inferred prescription (including first fill from Hold)		**Hold** • Reverses the claim from the Third Party. • Prescription is cancelled and has a *Hold* status locally. • Dispense is reversed on the EHR. If a Pickup was previously completed, it is also retracted. The prescription remains on the EHR. On subsequent fill, a Dispense will be added to the EHR with the same EHR Rx ID. **Remove** • Reverses the claim from the Third Party. • Prescription has a *Cancelled* status locally and repeats are removed. • Prescription is removed or discontinued on the EHR. On subsequent fill, a new prescription is added to the EHR. **Cancel** • Exits with no changes.
New non-inferred (pharmacy prescribed) prescription (including first fill from Hold)		**Hold** • Reverses the claim from the Third Party. • Prescription is cancelled and has a *Hold* status locally. • Dispense is reversed on the EHR. If a Pickup was previously completed, it is also retracted. The prescription remains on the EHR. On subsequent

		fill, the existing EHR Rx ID will be transmitted. **Remove** • Reverses the claim from the Third Party. • Prescription is removed locally. For a first fill from Hold, the prescription is discontinued instead. • Prescription is removed from the EHR or discontinued (if it was a first fill from Hold). On subsequent fill, a new prescription is added to the EHR. **Cancel** • Exits with no changes.
ReAuth of a non-inferred (pharmacist prescribed) prescription (including first fill from Hold)		**Hold** • Reverses the claim from the Third Party. • Prescription is cancelled and has a *Hold* status locally. • Dispense is reversed on the EHR. If a Pickup was previously completed, it is also retracted. The prescription remains on the EHR. On subsequent fill, the existing EHR Rx ID will be transmitted. **Remove** • Reverses the claim from the Third Party. • Prescription has a *Cancelled* status locally and repeats are removed. • Prescription is removed from the EHR or discontinued (if it was a first fill from Hold). On subsequent fill, a

		new prescription is added to the EHR. **<u>Cancel</u>** • Exits with no changes.
Refill	No prompt is displayed.	• Reverses the claim from the Third Party. • The prescription is marked with a *Cancelled* status locally. • Dispense is reversed on the EHR. If a Pickup was previously completed, it is also retracted. • The prescription can be refilled again later against the same EHR Rx ID.
Hold inferred prescription		**<u>Remove</u>** • If the prescription was never filled, it is removed locally. No message is sent to the EHR as the prescription was not transmitted when it was placed on Hold. • For a first fill that was refused and placed on Hold, the prescription is discontinued in Propel Rx and the EHR. **<u>Cancel</u>** • Exits with no changes.
Hold non-inferred (pharmacist prescribed) prescription		**<u>Remove</u>** • Prescription is removed locally. • Prescription is removed from the EHR. • If an error is returned, the prescription will remain on *Hold* locally until the EHR refusal is processed successfully. If the EHR refusal was rejected because the

		timespan for the refusal has elapsed (e.g., past midnight), Propel Rx will automatically discontinue the prescription. **Cancel** • Exits with no changes.
Historical Netcare Batch prescriptions	As displayed in the scenarios above.	**Hold** • Reverses the claim from the Third Party. • Prescription is cancelled and has a *Hold* status locally. • Prescription is removed from the EHR via RTI, even though it was transmitted via Netcare Batch. • On subsequent fill, a new prescription is added to the EHR. **Remove** • Reverses the claim from the Third Party. • If the prescription is New, it is removed locally. If the prescription is a ReAuth, it has a *Cancelled* status locally and repeats are removed. • Prescription is removed from the EHR via RTI, even though it was transmitted via Netcare Batch. • On subsequent fill, a new prescription is added to the EHR. **Cancel** • Exits with no changes.

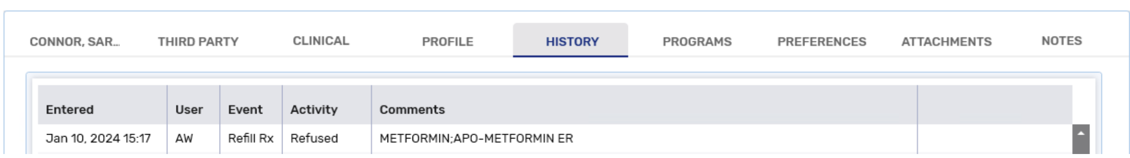
<table>
<tr>
<td>Downloaded prescription from the EHR</td>
<td>
</td>
<td><u>Hold</u>

Reverses the claim from the Third Party.
Dispense is reversed on the EHR. If the Pickup was previously completed, it is also retracted.
Prescription remains Active in Propel Rx.
Prescription remains on the EHR.

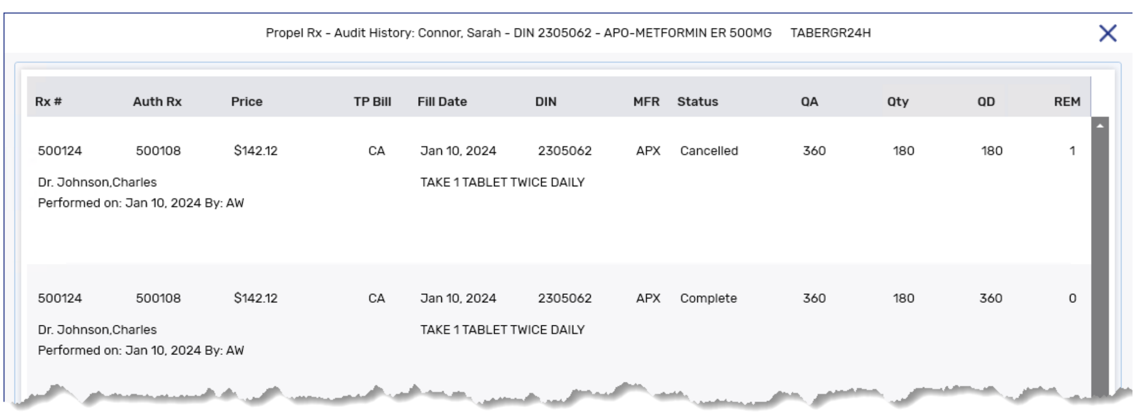
<u>Remove</u>

Reverses the claim from the Third Party.
Dispense and Pickup, if it was previously completed, are retracted on the EHR.
Prescription is removed locally.
Prescription remains on the EHR.
</td>
</tr>
</table>

All successful prescription refusals are recorded in the Patient Folder History tab, as shown below.



The Audit History for the prescription also accurately tracks the refusal, as shown below.



If for any reason, the retract or reversal message is unsuccessful, you are presented with a Detected Issue explaining the action could not be completed. The issue must be resolved before the reversal can be resubmitted.

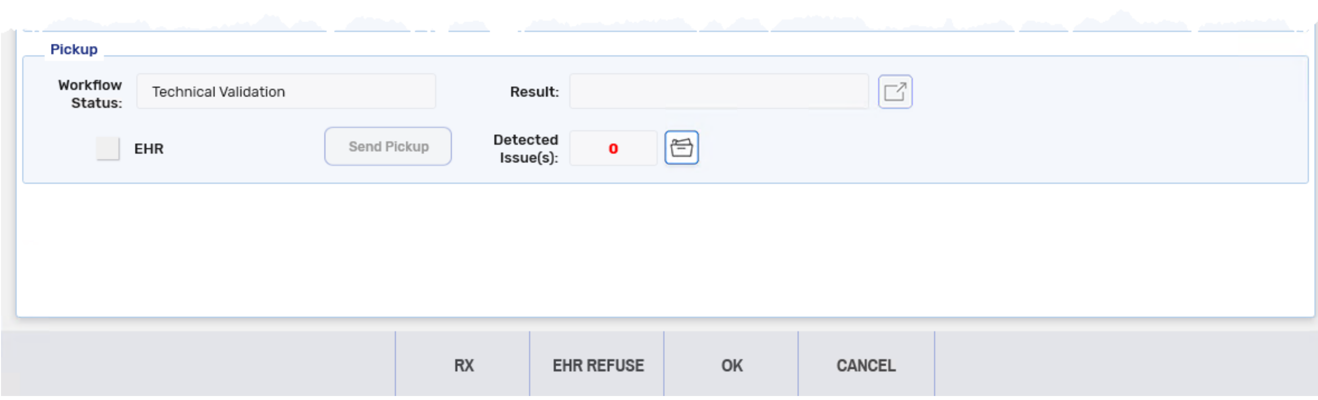
Resubmitting a Reversal to the EHR

If an error is returned by the EHR when refusing a prescription, the prescription status may be updated (e.g., Cancelled) in Propel Rx but not on the EHR. The **Result** field in the Rx Detail EHR tab will display Reverse Failed for the applicable section that was not successful (e.g., Create, Dispense, Pickup). Once the Detected Issue(s) is resolved, the reversal can be resubmitted to the EHR using the **EHR Refuse** button in Rx Detail.

Smarter & Faster

Prescriptions That Were Not Removed

If a prescription was not removed in cases where you wanted it to be, discontinue the prescription instead. For more information, see Inactivating a Prescription. If the prescription needs to be filled again, reauthorize the prescription or create a new prescription chain.



Refusing to Fill a Prescription

A healthcare professional should use their professional judgement to determine whether a prescription should not be filled. The **Refusal to Fill** message updates the patient's EHR Profile to advise healthcare professionals that a prescription was presented to your pharmacy, and in your professional judgement, you decided not to complete the dispense.

In Alberta, a Refusal to Fill can only be transmitted if the patient is synced with their primary PHN and the prescription already exists on the EHR (i.e., has a Rx ID). If the prescription does not exist on the EHR, the Refusal to Fill should be documented on paper.

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Updating a Refusal to Fill That was Sent in Error

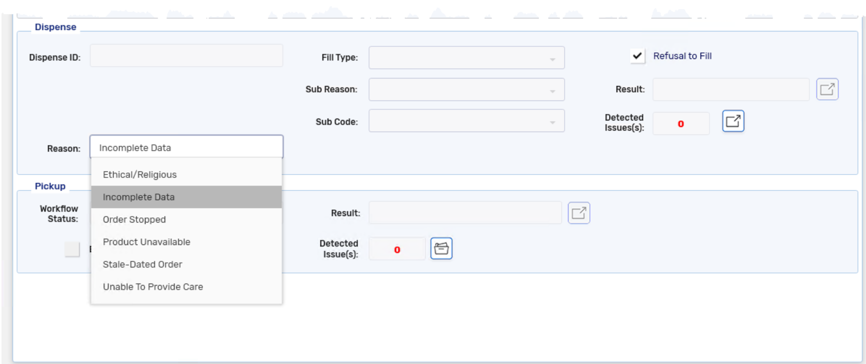
If a Refusal to Fill was sent in error, enter a prescription note and transmit it to the EHR so other healthcare professionals are aware. For more information, see [Adding Prescription Notes to the EHR](#).

To complete a **Refusal to Fill** transaction:

1. Refill the prescription until it reaches **Rx Detail**.
2. Clinical information is recommended to be reviewed at this time. If the Patient Medication Profile wasn't viewed in the last 2 hours, it automatically displays. Select **OK** once you have finished reviewing the EHR Profile.

   NOTE: If the EHR Profile cannot be loaded within 10 seconds, a prompt will appear with the options to bypass the forced view or continue waiting. If **Yes** is selected to the prompt, you can proceed without viewing the Profile

3. Enter any required information in the **Main** tab of Rx Detail.
4. Select the **EHR** tab.
5. Select the **Refusal to Fill** checkbox in the Dispense section.
6. Select a **Reason** from the dropdown list.

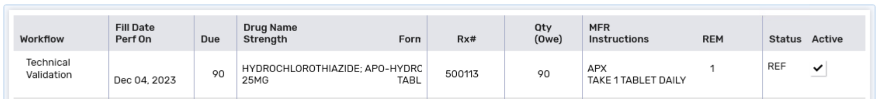


7. Select **Fill** to submit the Refusal to Fill to the EHR.

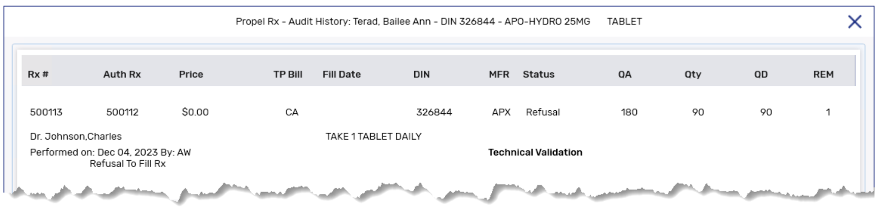
If a Detected Issue is returned by the EHR, appropriate action must be taken before the Refusal to Fill is recorded on the EHR.

When a Refusal to Fill is completed, a claim is not sent for adjudication, and the prescription status displays as **REF** or **Refusal** in the following locations:

- Patient's local Profile

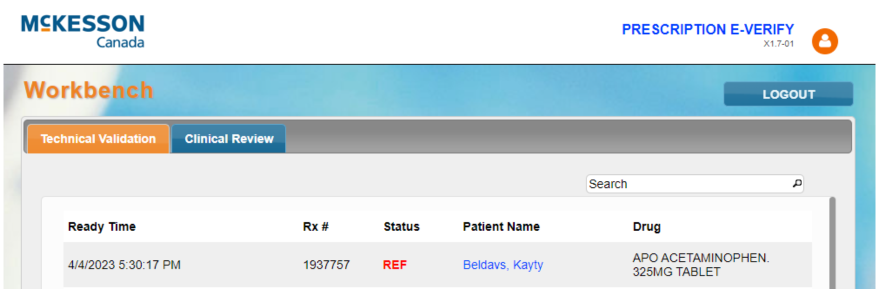


- Audit History

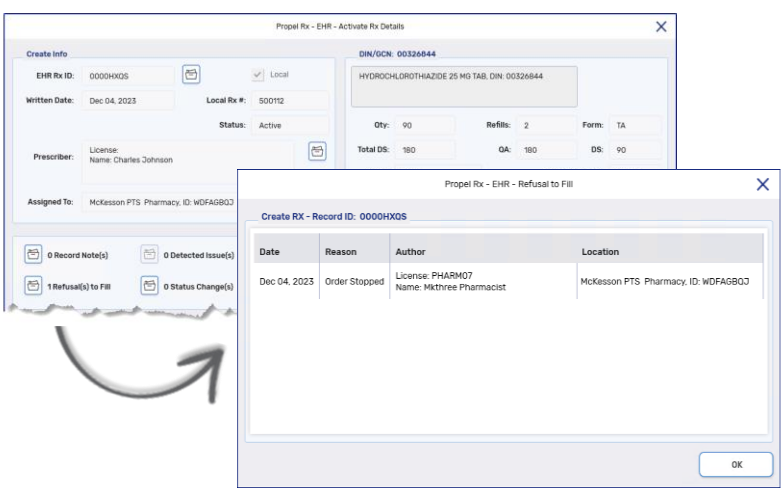


- Technical Validation and/or Clinical Review in Propel Rx

- Technical Validation and/or Clinical Review in Patient Centre if Digital Workflow is enabled



You can view the Refusal to Fill information on the patient's EHR profile by selecting the folder button  next to **Refusal(s) to Fill** in the EHR Rx Details window.



Inactivating a Prescription

Inactivating a Prescription From Propel Rx

After a prescription is processed on a patient's Profile, it is flagged as Active. If the patient is no longer actively taking a medication, the prescription should be inactivated. It is important that you inactivate the drugs that a patient is not currently taking. This makes their Profile more accurate in Propel Rx and the EHR to support clinical decision making.

When a prescription is inactivated, the following validations will be performed against the patient's sync status:

- If the patient is not synced, a prompt will block you from inactivating the prescription until you attempt to sync the patient. To qualify as a sync attempt, at minimum, you must select the PHN expander button in the Patient Folder. If you attempted to sync the patient but it was unsuccessful, the prompt will not appear again for that patient till the next day. If the prescription is inactivated when the patient is not synced, the status change will not be transmitted to the EHR.
- If the patient is synced with their secondary PHN, a Detected Issue will be returned, and you will be required to resync the patient with their primary PHN to continue.

The only exceptions to the sync requirement are the acceptable non-EHR patient statuses. Prescriptions for these patients may be inactivated but the status changes are not transmitted to the EHR.

A notes function allows you to document the reason for inactivating a prescription. The note is visible from the following locations:

- Rx Detail Notes tab when the prescription is detailed.
- EHR Profile if the note was transmitted to the EHR. The note is attached to the Create by default.

Updating the Status of Local Records

If a prescription is found locally and on the EHR, update the status from the Patient Profile tab in Propel Rx. Prescription status changes from the Patient Profile are transmitted to the EHR. If the status is updated from the EHR Profile, the change is not reflected locally. This can lead to Detected Issues when attempting to refill the prescription.

Please note, for historical prescriptions that were transmitted to the EHR via Netcare Batches, status updates must be done from the EHR Profile. For these prescriptions, status changes from the Patient Profile in Propel Rx will not be transmitted to the EHR.

To inactivate a prescription from Propel Rx:

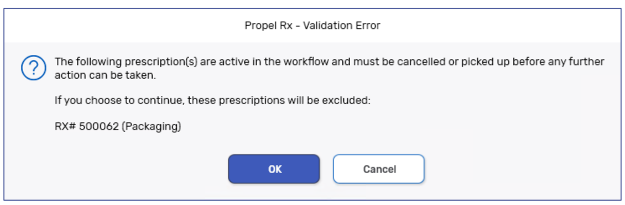
1. Open the **Patient Folder**.
2. Select the **Profile** tab.
3. Uncheck the **Active** checkbox for the prescription that needs to be inactivated. Prescriptions must be inactivated one at a time.

   NOTE: You must have EHR access to deselect the Active checkbox.

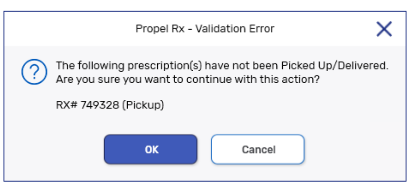
4. Clinical information is recommended to be reviewed at this time. If the Patient Medication Profile wasn't viewed in the last 2 hours, it automatically displays. Select **OK** once you have finished reviewing the EHR Profile.

   NOTE: If the EHR Profile cannot be loaded within 10 seconds, a prompt will appear with the options to bypass the forced view or continue waiting. If **Yes** is selected to the prompt, you can proceed without viewing the Profile

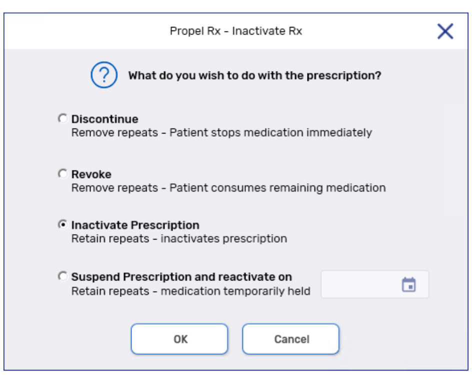
5. The following prompts may appear depending on the Workflow status of the prescription:
   - If the prescription has not completed Workflow, a prompt indicates the prescription will not be inactivated. Select **OK**. Process the prescription through Workflow or cancel it before inactivating.

   - If the prescription has not been picked up or delivered, a prompt asks if you want to continue. Select **OK** to continue.

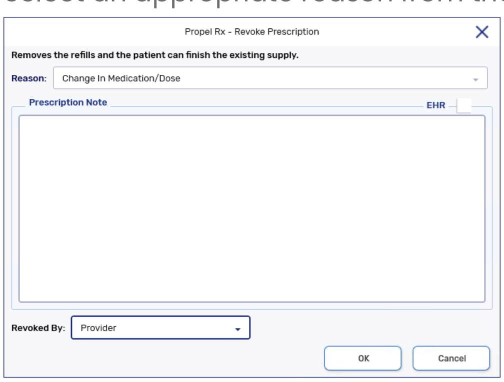
6. In the Inactivate Rx window, select one of the following options:

Propel Rx Term	EHR Term	Details
Discontinued	Aborted	Patient will no longer take the medication, effective immediately. Repeats are removed.
Revoked	Completed	Patient will take remaining medication until finished and then stop. Repeats are removed.
Inactivated	Suspended	Patient is not currently taking medication but may resume later. Repeats are retained.
Suspended	Suspended	Pharmacist will stop the medication for a specific period and then resume on a chosen date. Repeats are retained. If suspended from Propel Rx, the resume date is not transmitted to the EHR, however, on the specified date, the prescription status will change back to active in Propel Rx, and a resume message will be sent to the EHR once an authorized user with EHR access logs in. If the prescription was suspended from the EHR Profile, the resume date is transmitted to the EHR. On the specified date, the prescription will be resumed automatically by the EHR. For more information, see Updating a Prescription Status on the EHR.

NOTE: If a Detected Issue is returned for the prescription's reactivation, the transaction appears in the EHR Queue tile for management. The prescription's status remains unchanged until the transaction is sent to the EHR.

7. Select **OK**. An additional window opens.
8. Select an appropriate reason from the dropdown menu.



9. *Optional*: Enter any notes for the inactivation. Select the **EHR** checkbox if you want the note to be transmitted to the EHR.

10. *Optional*: Select who (i.e., Agent, Patient, Provider) initiated the inactivation process. This information is not transmitted to the EHR.
11. Select **OK**.

A processing message displays for the abort, revoke, or suspend and closes upon successful completion of the message to the EHR. The prescription is flagged as Inactive on the Patient Profile in Propel Rx with one of the following indicators:

- Discontinued = *D*
- Revoked = *V*
- Inactivated = *I*
- Suspended = *S*

If a Detected Issue is returned by the EHR, appropriate action must be taken before the status change is committed. If an error is returned that cannot be managed using Issue Management, the prescription's status remains unchanged on the EHR. Depending on the Detected Issue returned (e.g., prescription is already stopped), an EHR Profile Compare is recommended to ensure the prescription has the most up-to-date status synced from the EHR.

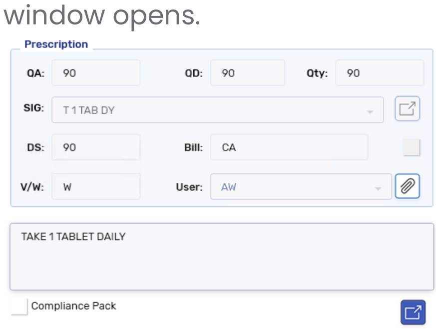
Aborting a Prescription Automatically From Propel Rx

A prescription can be automatically aborted on the EHR by setting a Stop Date. On the Stop Date, the prescription is discontinued in Propel Rx and an Abort message is sent to the EHR.

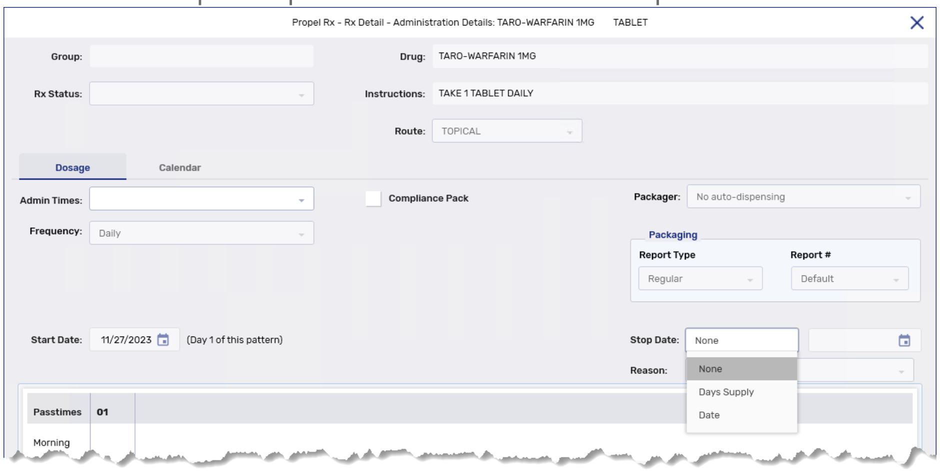
NOTE: If a Detected Issue is returned for the prescription's discontinuation, the transaction appears in the EHR Queue tile for management. The prescription's status remains unchanged until the transaction is sent to the EHR.

To set a Stop Date for a prescription:

1. Do one of the following:
   - If the prescription is incomplete, process it until it reaches Rx Detail.
   - If the prescription is complete, Amend it to open Rx Detail.
2. Select the expander button next to the Compliance Pack checkbox. The **Administration Details** window opens.



3. Dropdown the **Stop Date** field and select one of the following options:
   - **Days Supply** – prescription is inactivated once the days supply has elapsed.
   - **Date** – prescription is inactivated on the specified date.



4. Dropdown the **Reason** field and select an appropriate reason.
5. Select **OK**.

Resuming a Suspended Prescription From Propel Rx

If a suspended prescription is local, you can reactivate it from Propel Rx which will update its status on the EHR. If a resume date was specified when the prescription was inactivated, the prescription will be automatically reactivated on the chosen date; however, you can still manually resume the prescription earlier if needed.

NOTE: You can only resume inactivated or suspended prescriptions in Propel Rx. You cannot resume a discontinued or revoked prescription but you can refill it to create a new authorization if you received a new prescription or changed the status in error.

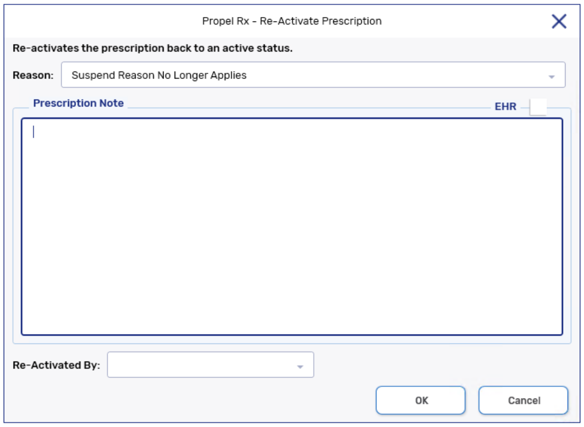
If the prescription is not local (i.e., on the EHR only), you can resume it from the EHR Profile by following the steps in Updating a Prescription Status on the EHR.

To resume a suspended prescription from Propel Rx:

1. Open the **Patient Folder**.
2. Select the **Profile** tab.
3. Select the **Active** checkbox for the prescription that needs to be resumed.
4. Clinical information is recommended to be reviewed at this time. If the Patient Medication Profile wasn't viewed in the last 2 hours, it automatically displays. Select **OK** once you have finished reviewing the EHR Profile.

NOTE: If the EHR Profile cannot be loaded within 10 seconds, a prompt will appear with the options to bypass the forced view or continue waiting. If **Yes** is selected to the prompt, you can proceed without viewing the Profile

5. The Re-Activate Prescription window opens. Dropdown the **Reason** field and select the appropriate option.



6. *Optional*: Enter any notes for the reactivation. Select the **EHR** checkbox if you want the note to be transmitted to the EHR.
7. *Optional*: Select who (i.e., Agent, Patient, Provider) initiated the reactivation process. This information is not transmitted to the EHR.
8. Select **OK**.

A processing message displays for the resume and closes upon successful completion of the message to the EHR. The prescription is flagged as Active on the Patient Profile in Propel Rx.

If a Detected Issue is returned by the EHR, appropriate action must be taken before the prescription's status is changed. Depending on the Detected Issue returned (e.g., prescription is already resumed), an EHR Profile Compare is recommended to ensure the prescription has the most up-to-date status synced from the EHR.

Updating a Prescription Status on the EHR

The Update Status button can be used to change the status of an EHR prescription.

Updating the Status of Local Records

If a prescription is found locally and on the EHR, update the status from the Patient Profile tab in Propel Rx. Prescription status changes from the Patient Profile are transmitted to the EHR. If the status is updated from the EHR Profile, the change is not reflected locally. This can lead to Detected Issues when attempting to refill the prescription.

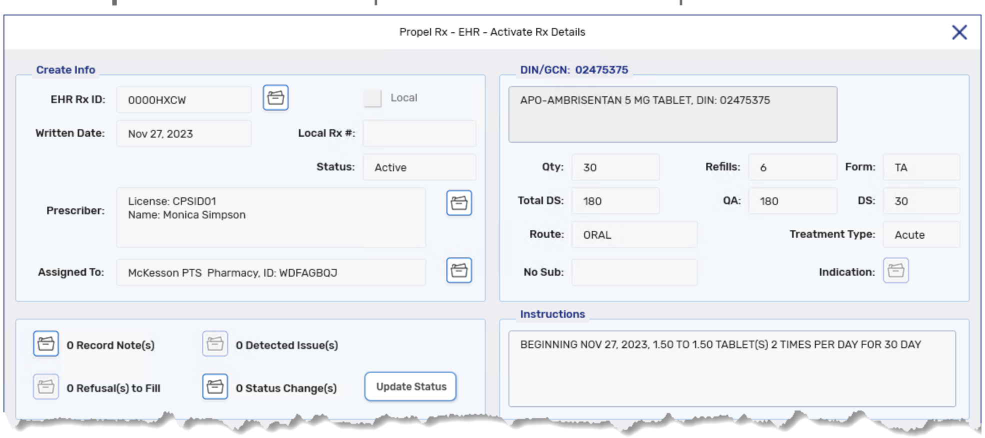
To update the status of an EHR prescription:

1. Do one of the following:
    - From the **Patient Folder Profile** tab, select **Rx** > **Profile**.
    - From the **Workbench**, highlight a patient and then select **Rx** > **Profile**.
    - From a **Workflow Detail** window (i.e., Data Entry, Packaging, Technical Validation, Clinical Review), select **Rx** > **Profile**.
2. Select one of the Profile options.
    - If **Historical EHR Rx's** was selected, an additional window opens with the option to customize the number of days' worth of data to retrieve. By default, 6 months is auto-populated but a maximum of 20 years can be entered. Enter the desired value and select **OK**.

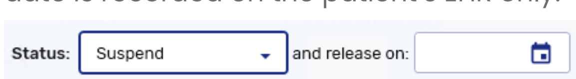
      NOTE: If more than 6 months is entered, there may be a delay in retrieving the data.

    - If **EHR Rx Search** was selected, enter the EHR Rx ID in the window that opens and select **OK**. The EHR Rx ID can be found in the Create section of the Rx Detail EHR tab. This number is not the same as the prescription number in Propel Rx.

   The EHR Profile window opens with the type of request indicated at the top.
3. Select the applicable prescription.
4. Select **Detail**. The Details window opens.
5. Select **Update Status**. The Update Status window opens.

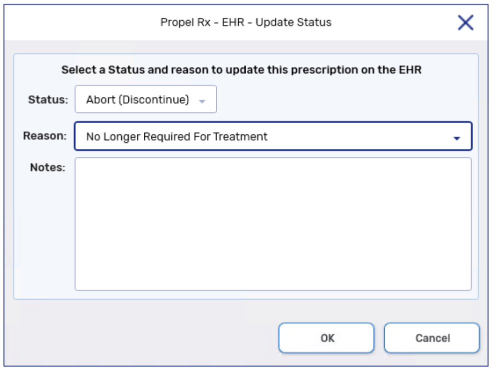


6. From the **Status** dropdown, select the status you want the prescription changed to. The following options are available:
    - Abort (Discontinue)
    - Revoke
    - Suspend – the release date records the intended release date for the prescription. This date is recorded on the patient's EHR only.

    - Resume

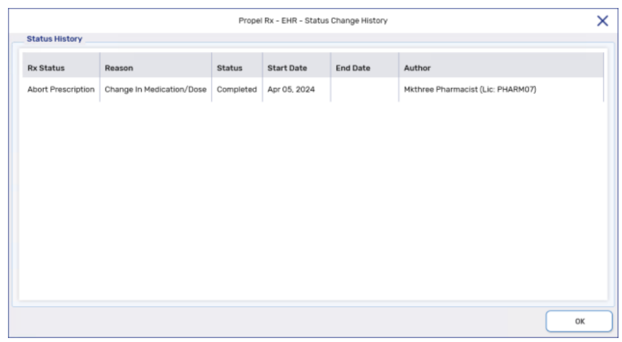
7. From the **Reason** dropdown list, select the reason for the status change.



8. *Optional*: In the **Notes** field, enter any comments about the status change.
9. Select **OK**.

A processing message displays and closes upon successful transmission to the EHR.

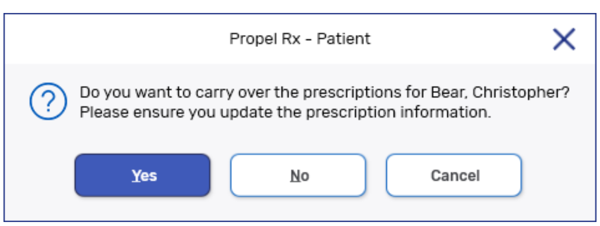
The status change is recorded in the Status Change History window which can be accessed by selecting the folder button beside the Update Status button in the EHR Rx Details window. The date of the action is the Start Date (e.g., when a prescription was suspended). The date an action will be completed (e.g., when a prescription will be resumed) is the End Date.



If a Detected Issue is returned by the EHR, appropriate action must be taken before the status change is committed. If an error is returned that cannot be managed using Issue Management, the prescription's status remains unchanged on the EHR.

Inactivating Prescriptions for Group Patients

Prior to EHR integration, when adding a patient to a group or moving them in between groups, a prompt would appear with the option to carry over the prescriptions for the patient. If No was selected, the prescriptions would be inactivated on the patient's Profile.



With EHR integration, the above prompt will no longer be displayed. By default, all the patient's prescriptions will be carried over to the group. If some prescriptions should not be carried over, you must inactivate them manually as outlined in Inactivating a Prescription From Propel Rx.

Transferring a Prescription

If a patient wants their prescription dispensed at another pharmacy, the transfer process can be initiated. When a prescription is transferred out in Propel Rx, the repeats are removed, and the prescription is flagged as Inactive. While any pharmacy can download the prescription from the EHR Profile, proper transfer protocol should be followed to grant authority for a pharmacy to dispense it. This entails contacting the originating pharmacy and receiving the prescription details either verbally or by fax.

Transferring In a Prescription

The Download button is used to transfer in a prescription from a patient's EHR. This is performed if the prescription has been transferred to your pharmacy. In Alberta, no message is sent to the EHR when a Transfer In is performed. **It is expected that the receiving pharmacy contacts the originating pharmacy to request the transfer before they download the prescription and dispense against it**. Refer to Transferring Out a Prescription for information on the transfer out process.

The Download button is available from any EHR Profile requested from the Rx menu. Prescriptions can be downloaded so long as they are **not local** and have an **Active**, **Suspended**, or **Completed** status. The following prescriptions cannot be downloaded by a pharmacy and must be entered manually instead:

- Cancer Center Dispense ()
- Blue Cross Dispense ()
- Pharmacy Batch Dispense ()

To download a prescription:

1. Open the **Patient Folder**.
2. Select the **Profile** tab.
3. Select **Rx** > **Profile**.
4. Select one of the EHR Profile options.

TIP: Use the **Eligible EHR Rx's Profile** to see all prescriptions that can be dispensed on the patient's EHR.

- If **Historical EHR Rx's** was selected, an additional window opens with the option to customize the number of days' worth of data to retrieve. By default, 6 months is auto-populated but a maximum of 20 years can be entered. Enter the desired value and select **OK**.

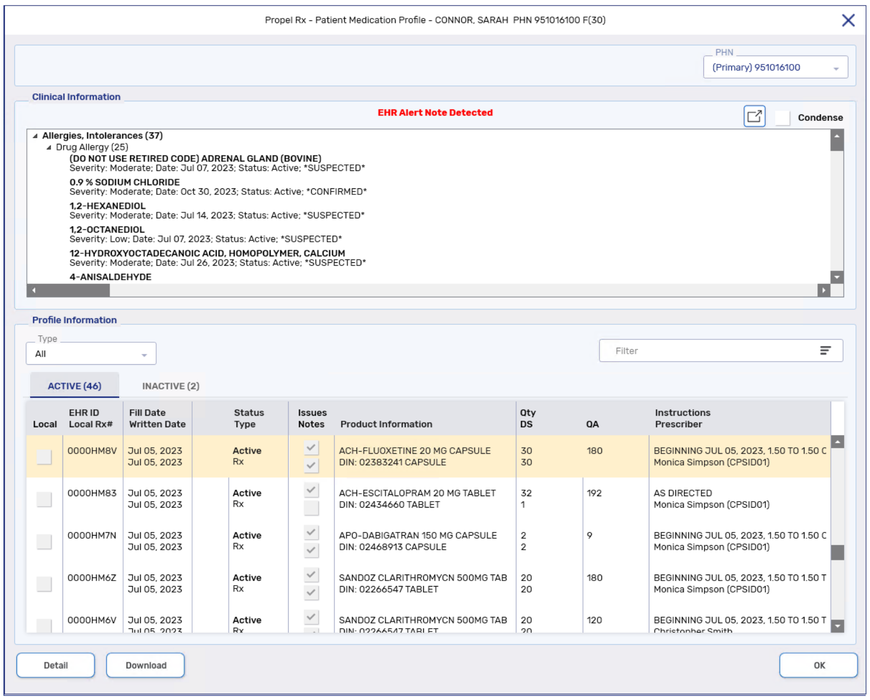
  NOTE: If more than 6 months is entered, there may be a delay in retrieving the data.

- If **EHR Rx Search** was selected, enter the EHR Rx ID in the window that opens and select **OK**. The EHR Rx ID can be found in the Create section of the Rx Detail EHR tab. This number is not the same as the prescription number in Propel Rx.

The EHR Profile window opens with the type of request indicated at the top.

5. Highlight the desired prescription record(s).

NOTE: If the patient has one or more secondary PHNs, you can only download prescriptions associated with the patient's primary PHN. By default, the EHR Profile opens with the primary PHN selected.



6. *Optional* - Select **Detail** to review the Create and Dispense details of the selected prescription. This information can be reviewed to ensure the correct prescription has been selected and for prescription transfers, provide an opportunity to confirm the information from the transferring pharmacy. Select **OK** once you've finished reviewing.
7. Select **Download**. The Ready Time window opens.
8. Enter a Ready Time.
9. Select **OK**.
10. If a matching drug cannot be found in Propel Rx, the Drug and Mixture Search window opens. Search for and select the appropriate drug.
11. If a matching prescriber cannot be found in Propel Rx, the Prescriber Search window opens. Search for and select the appropriate prescriber.
12. If the Patient Medication Profile hasn't been viewed in the last 2 hours, it automatically displays in Rx Detail. Select **OK** once you have finished reviewing the EHR Profile.

NOTE: If the EHR Profile cannot be loaded within 10 seconds, a prompt will appear with the options to bypass the forced view or continue waiting. If **Yes** is selected to the prompt, you can proceed without viewing the Profile.

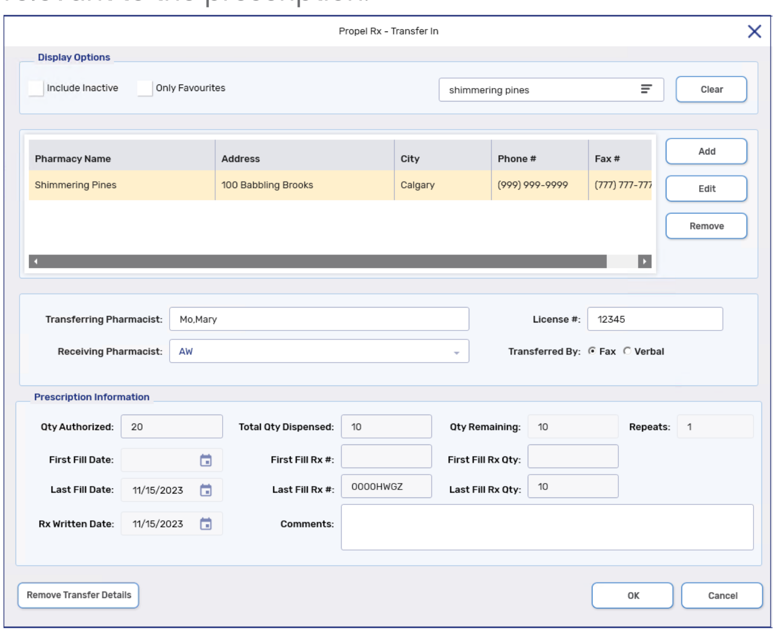
13. The Transfer In window displays. The values that are returned with the Download message are populated.
    - Transfer In details can be removed if needed by selecting the **Remove Transfer Details** button. You may wish to do this if you're reauthorizing a prescription. This can also be done later in Rx Detail at the time of reauthorization.

NOTE: If the prescription has not been dispensed yet (i.e., the Create is being downloaded), the Transfer In window does not open and the prescription automatically loads in Rx Detail.

14. Select the transferring pharmacy.

TIP: Propel Rx is preloaded with a database of pharmacies. Use the **Filter** to locate the pharmacy in the grid. By default, pharmacies in other provinces are flagged as Inactive. If the prescription was from another province, select the **Include Inactive** checkbox before using the Filter. If the pharmacy cannot be found, select **Add** to open the Other Pharmacy window to add a new pharmacy.

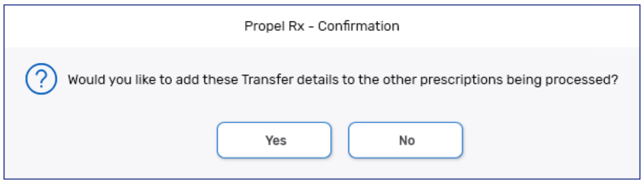
15. Enter the **Transferring Pharmacist** and **License #**. The License # is optional for Independent stores.
16. Dropdown the **Receiving Pharmacist** field and select the appropriate user, if not already selected.
17. Review the details in the **Prescription Information** section and add any comments that are relevant to the prescription.



18. Select **OK**.

NOTE: If Cancel is selected in the Transfer In window, the prescription is escaped.

19. If more than one prescription was selected to download, a prompt asks if you want the Transfer details (i.e., transferring pharmacy, pharmacists, license #) to be applied to the other prescriptions. Select **Yes** or **No**.



20. The downloaded prescription information is automatically populated in Rx Detail. The Rx ID from the EHR Profile auto-populates in the Create section of the EHR tab.
    - If the prescription has no repeats remaining, the QA, Qty, and DS are auto-populated based on information from the EHR Profile. Enter a new QA to reauthorize the prescription.
    - If the QA is modified, a new authorization is created, and the Rx ID is cleared from the EHR tab.

NOTE: If you are entering a new prescription instead of filling a transferred in prescription, you must do the following in the **Extended** tab:

- Update the **Written Rx Date**.
- Clear the Transfer In details by selecting the folder button in the Transfer In section followed by the **Remove Transfer Details** button.

ALERT: If the units of measure for the drug on the EHR Profile do not match the Pack Size and Price Code in Propel Rx, you should adjust the QA, Qty, and DS to match the drug setup in Propel Rx. This will create a new authorization.

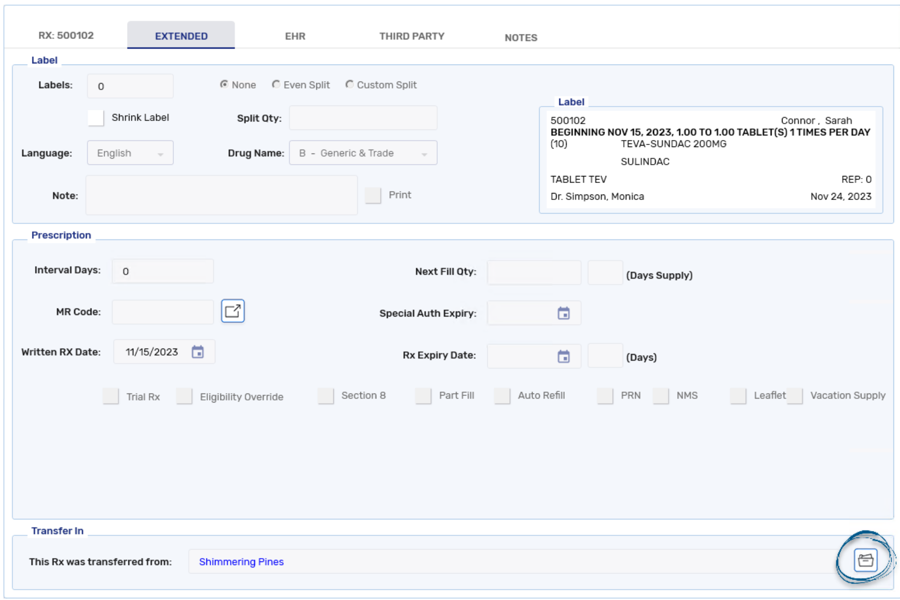
- The Written Date and Transfer In details should not be removed in the Transfer In window.
- It is recommended to add a prescription note to link the prescription to the previous authorization.
- You may also discontinue the previous authorization on the EHR Profile to keep the Profile organized. See Updating the Status of a Prescription for more information.

For example, a prescription for an inhaler exists on a patient's EHR. The quantities were entered as the number of inhalers dispensed. In Propel Rx, the Drug has a Pack Size of 200 and Price Code of C (unit); therefore, prescription quantities need to be entered by the number of puffs dispensed in Propel Rx.

21. Verify all information in Rx Detail and select either **Fill** or **Hold**.

To view the Transfer In details of a completed prescription:

1. From the **Workbench** or **Patient Profile**, highlight the prescription.
2. Select **Detail**. The prescription loads in Rx Detail.
3. Select the **Extended** tab.
4. Select the folder button in the **Transfer In** section. The Transfer In window opens.

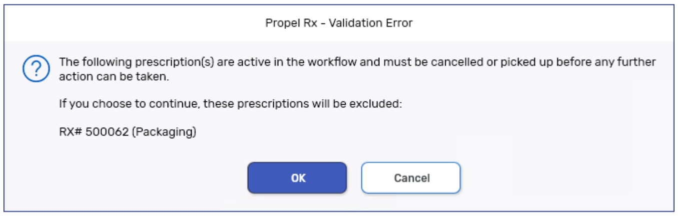


Transferring Out a Prescription

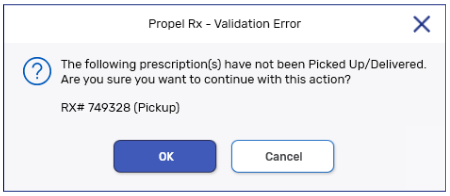
The Transfer Out function is used to transfer the ownership of a prescription from your pharmacy to another pharmacy. In Alberta, no message is sent to the EHR when a Transfer Out is performed. **It is expected that the originating pharmacy is contacted and requested to perform a transfer out by the receiving pharmacy before the prescription is downloaded**.

To transfer out a prescription:

1. Open the **Patient Folder**.
2. Select the **Profile** tab.
3. Highlight the prescription(s).
4. Select **Rx** > **Transfer**.
   - If the prescription has not completed Workflow, a prompt indicates the prescription will be excluded from the transfer. Select **OK**. Process the prescription through Workflow or cancel it before transferring.



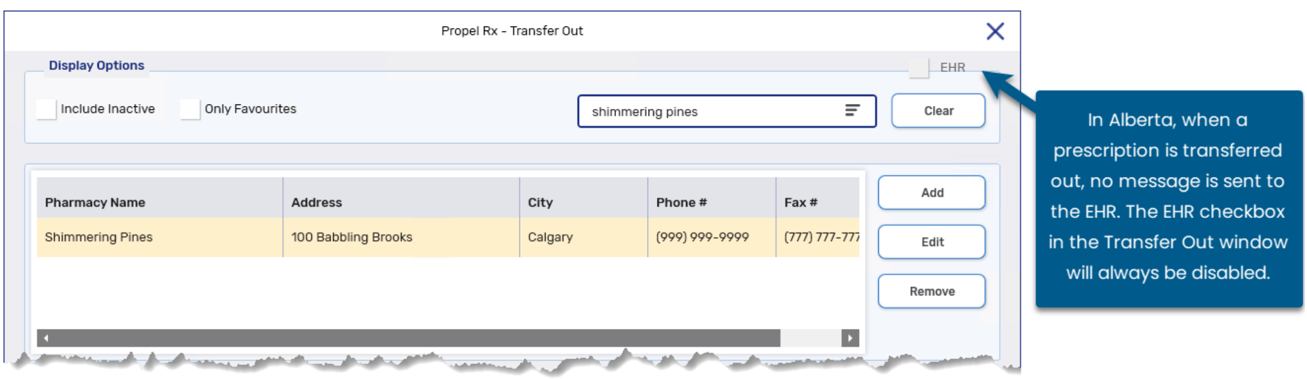
- If the prescription has not been picked up or delivered, a prompt asks if you want to continue. Select **OK** to continue.



The Audit History of each prescription appears. This can be used to provide the other pharmacy with information about the prescription.

5. Select **OK**. The Transfer Out window opens.
6. Select the receiving pharmacy.

TIP: Propel Rx is preloaded with a database of pharmacies. Use the **Filter** to locate the pharmacy in the grid. By default, pharmacies in other provinces are flagged as Inactive. If the prescription was from another province, select the **Include Inactive** checkbox before using the Filter. If the pharmacy cannot be found, select **Add** to open the Other Pharmacy window to add a new pharmacy.



7. Complete the remaining Transfer Out fields as usual.
8. Select **OK**. The Transfer Report window opens.
9. Select the **Fax** and/or **Print** checkboxes.
10. Select **OK**. The Prescription Transfer Report is faxed and/or prints.

The prescription is marked as **Transferred** (**TRN**) on the Patient Profile in Propel Rx. The Local checkbox is deselected on all EHR Profiles, however, the Dispense History still indicates if the dispense occurred locally.

Prescription Notes on the EHR

On the EHR Profiles, prescription notes are referred to as **Record Notes**. You can view Record Notes from any EHR Profile within Propel Rx and add them whether the prescription exists locally or not.

Viewing Prescription Notes on the EHR

Once a prescription note is added, you can view it by selecting the prescription from the patient's EHR Profile.

To view prescription notes on the EHR:

1. Do one of the following:
    - From the **Patient Folder Profile** tab, select **Rx** > **Profile**.
    - From the **Workbench**, highlight a patient and then select **Rx** > **Profile**.
    - From a **Workflow Detail** window (i.e., Data Entry, Packaging, Technical Validation, Clinical Review), select **Rx** > **Profile**.
2. Select one of the Profile options.
    - If **Historical EHR Rx's** was selected, an additional window opens with the option to customize the number of days' worth of data to retrieve. By default, 6 months is auto-populated but a maximum of 20 years can be entered. Enter the desired value and select **OK**.

      NOTE: If more than 6 months is entered, there may be a delay in retrieving the data.

    - If **EHR Rx Search** was selected, enter the EHR Rx ID in the window that opens and select **OK**. The EHR Rx ID can be found in the Create section of the Rx Detail EHR tab. This number is not the same as the prescription number in Propel Rx.

   The EHR Profile window opens with the type of request indicated at the top.
3. Select the applicable prescription.
4. Select **Detail**. The Details window opens.
5. If you want to view notes for a Dispense, select the appropriate record from the Dispense History section and then select **Detail**. If you want to view notes for the Create, skip to step 6.
6. Select the folder button beside **Record Note(s)** to view the prescription notes.

Adding Prescription Notes to the EHR

When adding a note to a prescription in Propel Rx, you must determine if the note should be added to the patient's EHR Profile. If it is determined that the note should exist on the patient's EHR Profile for other healthcare professionals to view, select the **EHR** checkbox to transmit the note to the EHR. Once the EHR checkbox is selected, a dropdown is available for you to choose whether to attach the note to the Create or Dispense.

If the prescription is not local, you also have the option to add a Record Note directly from the EHR Profile.

If the patient is not synced, a prompt will block you from adding a prescription note until you attempt to sync the patient. To qualify as a sync attempt, at minimum, you must select the PHN expander button in the Patient Folder. If you attempted to sync the patient but it was unsuccessful, the prompt will not appear again for that patient till the next day. If a note is added when the patient is not synced, the note will not be transmitted to the EHR.

Removing Prescription Notes

If a prescription note was transmitted to the EHR in error, it cannot be removed or edited. Add another note to convey additional information if needed. Only prescription notes that haven't been transmitted to the EHR can be removed.

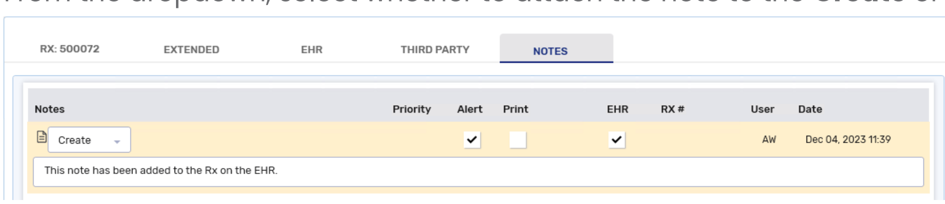
Adding an Existing Prescription Note to the EHR

If you want to transmit a note to the patient's EHR, you must select the EHR checkbox. The prescription must already exist on the EHR or be in the process of being transmitted to the EHR (i.e., Data Entry).

ALERT: You cannot transmit existing prescription notes for historical Netcare Batch prescriptions. The prescription must be transmitted to the EHR first (i.e., refilled) before a prescription note can be transmitted.

To add an existing prescription note to the EHR:

1. Highlight the prescription from the **Workbench** or **Patient Profile**.
2. Select **Detail**. The prescription opens in Rx Detail.
3. Select the **Notes** tab.
4. Select the **EHR** checkbox for the applicable note.
5. From the dropdown, select whether to attach the note to the **Create** or **Dispense**.



6. Select **OK**.

A processing message displays and closes upon successful transmission of the note to the EHR.

If a Detected Issue is returned by the EHR, appropriate action must be taken before the note is saved on the EHR.

Upon refill, any notes that were entered for the prescription are copied over to the refilled prescription in Propel Rx. However, the copied notes will be local only (i.e., EHR flag will be off). The EHR flag will only be indicated on the original note.

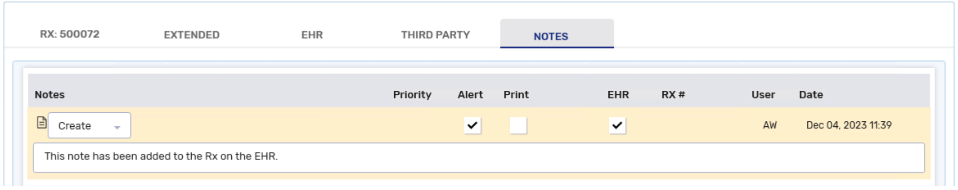
Adding a New Prescription Note to the EHR From Propel Rx

When a prescription note is added, by default, the EHR checkbox is deselected. You must select this checkbox to transmit the note to the EHR. The prescription must already exist on the EHR or be in the process of being transmitted to the EHR (i.e., Data Entry).

To add a new prescription note to the EHR from Propel Rx:

1. Do one of the following:
    - If the prescription has already been filled, **Detail** the prescription from the Workbench or Patient Profile.
    - If the prescription has not been filled, **process** it from the Workbench or Patient Profile.

    The prescription opens in Rx Detail.
2. Select the **Notes** tab.
3. Select **Add**.
4. Select the **EHR** checkbox for the note.
5. From the dropdown, select whether to attach the note to the **Create** or **Dispense**.
6. Enter your note text.

7. Do one of the following:
    - If the prescription has already been filled, select **OK**.
    - If the prescription has not been filled, complete the necessary fields in Rx Detail and then select **Fill**. The note will be transmitted to the EHR once the prescription has transmitted successfully. If the prescription fails to transmit, the note is saved locally only.

A processing message displays and closes upon successful transmission of the note to the EHR.

If a Detected Issue is returned by the EHR, appropriate action must be taken before the note is saved on the EHR. If an error is returned that cannot be managed using Issue Management, the note is saved locally.

Upon refill, any notes that were entered for the prescription are copied over to the refilled prescription in Propel Rx. However, the copied notes will be local only (i.e., EHR flag will be off). The EHR flag will only be indicated on the original note.

Adding a New Prescription Note From the EHR

Whether a prescription exists locally or not, you can add notes to its Create or Dispense directly from the EHR Profile.

To add a new prescription note from the EHR:

1. Do one of the following:
   - From the **Patient Folder Profile** tab, select **Rx** > **Profile**.
   - From the **Workbench**, highlight a patient and then select **Rx** > **Profile**.
   - From a **Workflow Detail** window (i.e., Data Entry, Packaging, Technical Validation, Clinical Review), select **Rx** > **Profile**.
2. Select one of the Profile options.
   - If **Historical EHR Rx's** was selected, an additional window opens with the option to customize the number of days' worth of data to retrieve. By default, 6 months is auto-populated but a maximum of 20 years can be entered. Enter the desired value and select **OK**.

     NOTE: If more than 6 months is entered, there may be a delay in retrieving the data.

   - If **EHR Rx Search** was selected, enter the EHR Rx ID in the window that opens and select **OK**. The EHR Rx ID can be found in the Create section of the Rx Detail EHR tab. This number is not the same as the prescription number in Propel Rx.

   The EHR Profile window opens with the type of request indicated at the top.
3. Select the applicable prescription.
4. Select **Detail**. The Details window opens.
5. If you want to add the note to a Dispense, select the appropriate record from the Dispense History section. If you want to add the note to the Create, skip to step 6.
6. Select the folder button beside Record Note(s).
7. Select the plus button. The Add record Notes window opens.
8. Enter your note text.
9. Select **OK**.

A processing message displays and closes upon successful transmission of the note to the EHR.

If a Detected Issue is returned by the EHR, appropriate action must be taken before the note is saved on the EHR.

DUR (Other Medication)

DURs (Other Medications) are medications that were not filled as prescriptions in your pharmacy. These include over the counter drugs, natural health products, prescriber drug samples, etc. These medications can be added to a patient's Profile for Propel Rx interaction checking and clinical decision making purposes.

When a DUR is added or detailed, the following validations will be performed against the patient's sync status:

- If the patient is not synced, a prompt will block you from adding or detailing the DUR until you attempt to sync the patient. To qualify as a sync attempt, at minimum, you must select the PHN expander button in the Patient Folder. If you attempted to sync the patient but it was unsuccessful, the prompt will not appear again for that patient till the next day. If a DUR is added for an unsynced patient, the EHR checkbox in the DUR Instructions window will be unchecked and disabled.
- If the patient is synced with their secondary PHN, a Detected Issue will be returned, and you will be required to resync the patient with their primary PHN to continue.

Adding a DUR to the EHR

Existing or new DURs can be transmitted to the EHR.

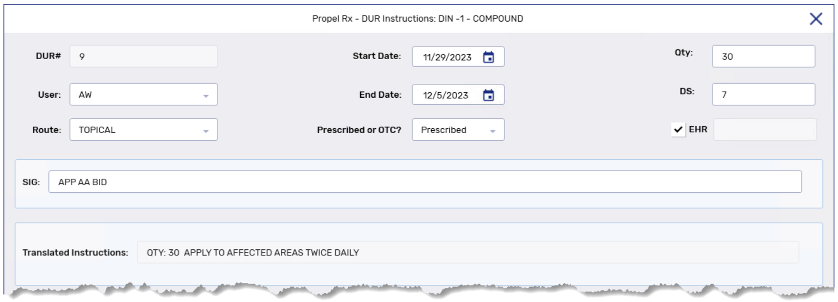
Adding an Existing DUR to the EHR

To add an existing DUR to the EHR:

1. Open the **Patient Folder**.
2. Select the **Profile** tab.
3. Select the DUR.
4. Select **Detail**.
5. Clinical information is recommended to be reviewed at this time. If the Patient Medication Profile wasn't viewed in the last 2 hours, it automatically displays in Rx Detail. Select **OK** once you have finished reviewing the EHR Profile.

   NOTE: If the EHR Profile cannot be loaded within 10 seconds, a prompt will appear with the options to bypass the forced view or continue waiting. If **Yes** is selected to the prompt, you can proceed without viewing the Profile

6. The DUR Instructions window opens. Select the **EHR** checkbox.



7. Select **OK**. The DUR is transmitted to the EHR.
   - If an error is returned from the EHR, the DUR is saved locally but not transmitted to the EHR. Once the error is addressed, the DUR can be transmitted again. For more information, see Detected Issues and Issue Management.
   - An EHR ID is assigned to the record which is visible when the DUR is detailed.
8. Select **Save**.

Adding a New DUR to the EHR

New DURs can be added using the **Add DUR** function.

To add a new DUR to the EHR:

1. Open the **Patient Folder**.
2. Select the **Profile** tab.
3. Select **Rx** > **Add DUR**.
4. Clinical information is recommended to be reviewed at this time. If the Patient Medication Profile wasn't viewed in the last 2 hours, it automatically displays. Select **OK** once you have finished reviewing the EHR Profile.

   NOTE: If the EHR Profile cannot be loaded within 10 seconds, a prompt will appear with the options to bypass the forced view or continue waiting. If **Yes** is selected to the prompt, you can proceed without viewing the Profile

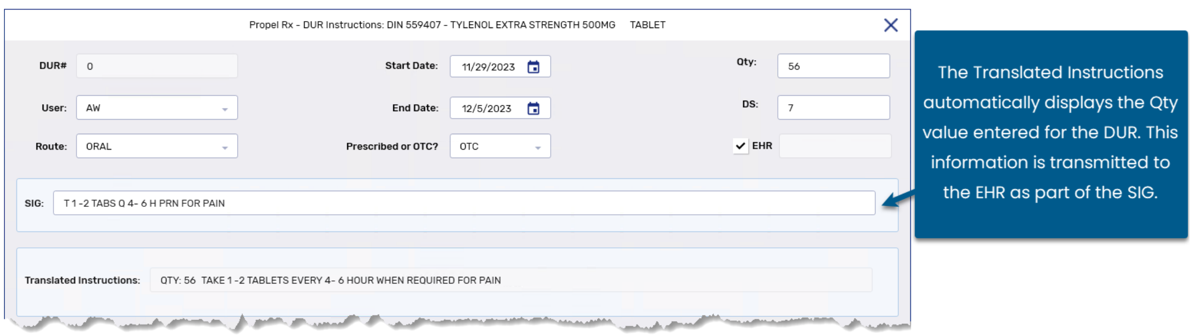
5. The Drug and Mixture Search window opens. Enter the desired search criteria and then select the appropriate drug.
6. Propel Rx interaction checking occurs. Either the Interaction Summary window opens, or a prompt indicates that no interactions exist. Depending on which window appears, select **Accept** or **OK**. The DUR Instructions window opens.
7. By default, the **EHR** checkbox is selected. If you do not want the DUR transmitted to the EHR, deselect the **EHR** checkbox. For drugs and mixtures that have an EHR Type of Non-EHR, the EHR checkbox will be OFF and disabled.

   NOTE: For mixtures, enter an EHR DIN/PIN in the Mixture Folder Alternatives tab if the EHR DIN/PIN is also used when transmitting dispenses for the mixture. If not entered, DURs for mixtures and anything without a real DIN/NPN will remain local.

8. Select the appropriate **Route** if it's not already specified.

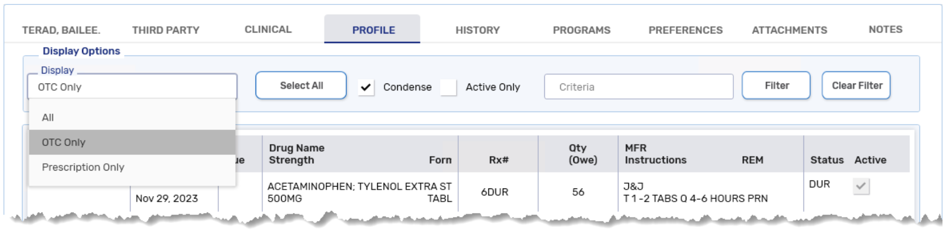
NOTE: The Route of administration is required. Propel Rx populates the route based on the route information in the Drug or Mixture Folder.

9. Enter the **Start** and **End Date**. The date range will be converted to an active period on the EHR which corresponds to short or long term therapy.
   - If the date range spans 90 days or less, the drug is considered short term, and the active period for the drug on the EHR will be 90 days.
   - If the date range spans more than 90 days, the drug is considered long term, and the active period for the drug on the EHR will be 540 days.
10. Specify whether the medication was prescribed or OTC.
11. Enter the **Quantity** and **Days Supply**. The Quantity is automatically added to the translated instructions which are sent to the EHR.
12. Enter the **SIG**.



13. Notes can be added locally to a DUR, but they will not be transmitted to the EHR. To add notes to the DUR:
    a. select the **Add** button in the **Notes** section.
    b. Enter the information for the note in the textbox.
14. Select **OK**. The DUR is transmitted to the EHR if the EHR checkbox was selected and added to the Patient Profile.
    - If an error is returned from the EHR, the record will be saved locally. You must correct the necessary data and then retransmit the record to the EHR by following the steps in [Adding an Existing DUR to the EHR](#).
    - If the DUR was transmitted to the EHR, an EHR ID is assigned to the record which is visible when the DUR is detailed.
15. Select **Save**.

TIP: To filter for Other Medications on the Patient Profile in Propel Rx, dropdown the **Display** field and select **OTC Only**. Refer to [Overview of the EHR - Other Medication Details Window](#) to see how the Other Medication record appears on the EHR.



Refilling a DUR

If a patient is continuing a non-prescription medication, you can use the **Refill DUR** feature in Propel Rx to maintain an Audit History for the medication. On the EHR however, refills of DURs are not supported; therefore, new records are created on the EHR each time Refill DUR is used.

To refill a DUR:

1. Open the **Patient Folder**.
2. Select the **Profile** tab.
3. Select the DUR.
4. Select **Rx** > **Refill DUR**.
5. Clinical information is recommended to be reviewed at this time. If the Patient Medication Profile wasn't viewed in the last 2 hours, it automatically displays in Rx Detail. Select **OK** once you have finished reviewing the EHR Profile.

   NOTE: If the EHR Profile cannot be loaded within 10 seconds, a prompt will appear with the options to bypass the forced view or continue waiting. If **Yes** is selected to the prompt, you can proceed without viewing the Profile

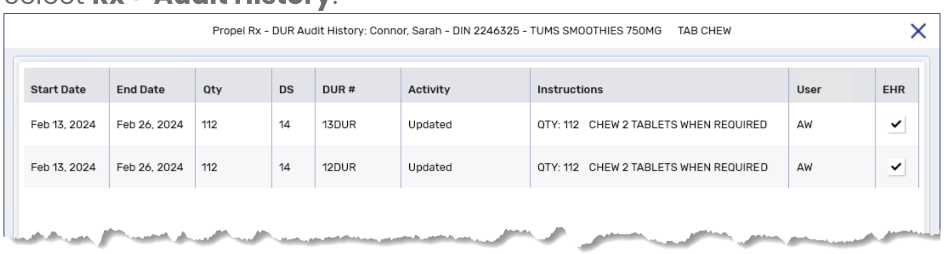
6. Propel Rx interaction checking occurs. Either the Interaction Summary window opens, or a prompt indicates that no interactions exist. Depending on which window appears, select **Accept** or **OK**. The DUR Instructions window opens with information pre-populated based on the previous DUR.
7. Make any necessary edits to information in the window.
8. Enter an **End Date**. The date range will be converted to an active period on the EHR which corresponds to short or long term therapy.
   - If the date range spans 90 days or less, the drug is considered short term, and the active period for the drug on the EHR will be 90 days.
   - If the date range spans more than 90 days, the drug is considered long term, and the active period for the drug on the EHR will be 540 days.
9. Notes can be added locally to a DUR, but they will not be transmitted to the EHR. To add notes to the DUR:
   a. select the **Add** button in the **Notes** section.
   b. Enter the information for the note in the textbox.

10. Select **OK**. The DUR is transmitted to the EHR if the EHR checkbox was selected and added to the Patient Profile.
    - If an error is returned from the EHR, the DUR is saved locally but not transmitted to the EHR. Once the error is addressed, the DUR can be transmitted again by following the steps in Adding an Existing DUR to the EHR.
    - If the DUR was transmitted to the EHR, an EHR ID is assigned to the record which is visible when the DUR is detailed.
11. Select **Save**.

Viewing the DUR Audit History

To view the Audit History for a DUR:

1. Open the **Patient Folder**.
2. Select the **Profile** tab.
3. Select the DUR.
4. Select **Rx** > **Audit History**.


Propel Rx - DUR Audit History: Connor, Sarah - DIN 2246325 - TUMS SMOOTHIES 750MG TAB CHEW

Start Date	End Date	Qty	DS	DUR #	Activity	Instructions	User	EHR
Feb 13, 2024	Feb 26, 2024	112	14	13DUR	Updated	QTY: 112 CHEW 2 TABLETS WHEN REQUIRED	AW	✓
Feb 13, 2024	Feb 26, 2024	112	14	12DUR	Updated	QTY: 112 CHEW 2 TABLETS WHEN REQUIRED	AW	✓

5. Select **OK** once you are done viewing.

Updating a DUR

Once DURs are transmitted to the EHR, they cannot be edited except by adding additional notes. For local only DURs, all fields in the DUR Instructions window can be edited after the record is saved.

To update a DUR:

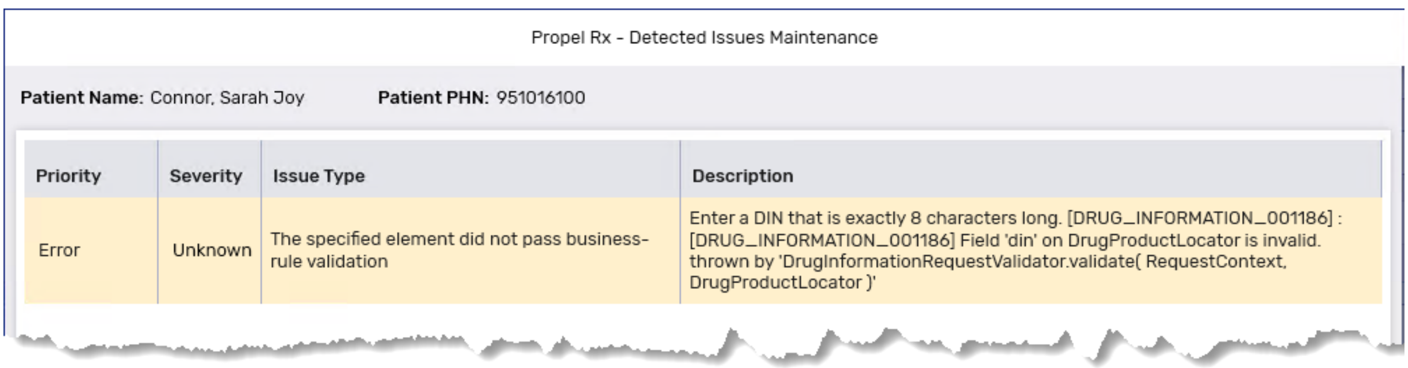
1. Open the **Patient Folder**.
2. Select the **Profile** tab.
3. Select the DUR.
4. Select **Detail**.
5. Clinical information is recommended to be reviewed at this time. If the Patient Medication Profile wasn't viewed in the last 2 hours, it automatically displays in Rx Detail. Select **OK** once you have finished reviewing the EHR Profile.

NOTE: If the EHR Profile cannot be loaded within 10 seconds, a prompt will appear with the options to bypass the forced view or continue waiting. If **Yes** is selected to the prompt, you can proceed without viewing the Profile

6. The DUR Instructions window opens. Do one of the following:
   - If the DUR was transmitted to the EHR and you need to add notes, select the **Add** button in the **Notes** section. Enter information in the Notes textbox.
   - If the DUR is local only, enter or modify any necessary information in the window.
7. Select **OK**.
8. Select **Save**.

Resolving a DUR With an Invalid DIN

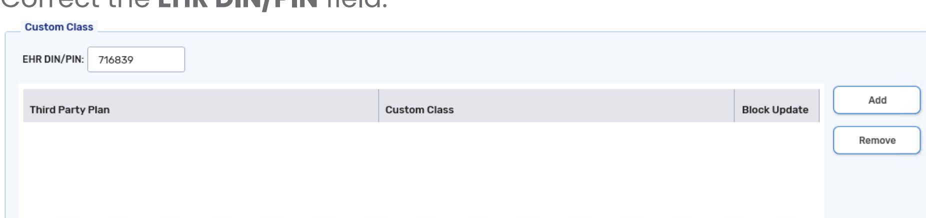
If a DUR has an invalid DIN, the submission will be rejected by the EHR with the following Detected Issue:



After selecting **OK** or **Cancel** to the Detected Issue, the DUR will be saved locally only. You can enter an EHR DIN/PIN in the Drug Folder or Mixture Folder if the DIN/PIN also applies when dispensing. Otherwise, you may keep the record locally.

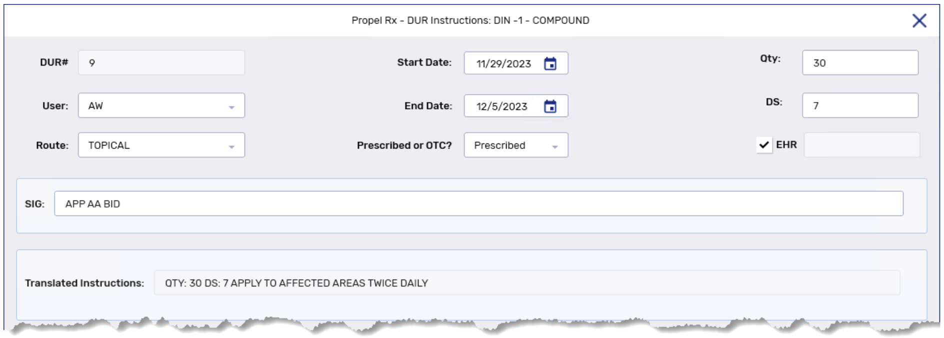
To enter an EHR DIN/PIN:

1. When the Detected Issue is received, select **OK** or **Cancel** to exit the window. The DUR is saved locally on the patient's Profile in Propel Rx.
2. Open the **Drug Folder** or **Mixture Folder** for the medication you submitted above.
3. Select the **Alternative** tab.
4. Correct the **EHR DIN/PIN** field.



5. Select **Save**.

6. Open the **Patient Folder**.
7. Select the **Profile** tab.
8. Select the DUR.
9. Select **Detail**. The DUR Instructions window opens.
10. Select the **EHR** checkbox.



11. Select **OK**. The DUR is transmitted to the EHR.
    - If a warning is returned from the EHR, you must acknowledge it by selecting **OK** before the DUR can be saved on the EHR.
    - An EHR ID is assigned to the record which is visible when the DUR is detailed.
12. Select **Save**.

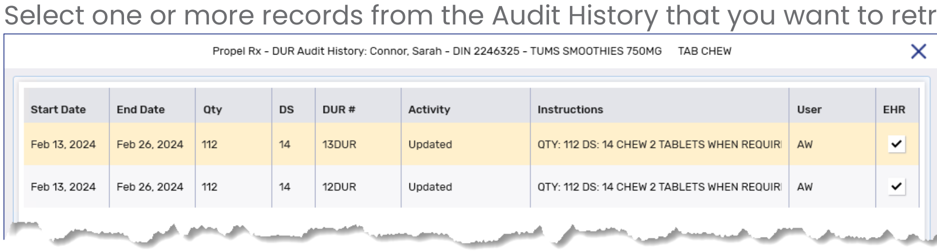
Retracting a DUR From the EHR

If a DUR was transmitted to the EHR in error, you may retract it from the EHR. DURs cannot be inactivated once transmitted to the EHR; the Active checkbox is disabled.

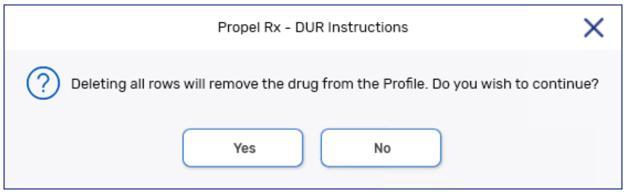
Removing a DUR From the EHR and Propel Rx

To remove a DUR from the EHR and Propel Rx:

1. Open the **Patient Folder**.
2. Select the **Profile** tab.
3. Select the DUR.
4. Select **Rx** > **Audit History**. The DUR Audit History window opens.
5. Select one or more records from the Audit History that you want to retract.



6. Select **Remove**.
7. A prompt appears asking if you want to continue. Select **Yes**.



A processing message appears indicating the information is being retracted from the EHR. Once successful, the DUR is removed from the Patient Profile and EHR.

8. Select **Save**.

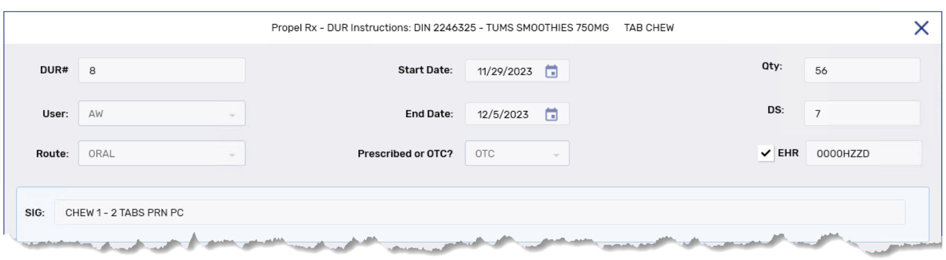
Removing a DUR From the EHR Only

To remove a DUR from the EHR only:

1. Open the **Patient Folder**.
2. Select the **Profile** tab.
3. Select the DUR.
4. Select **Detail**.
5. Clinical information is recommended to be reviewed at this time. If the Patient Medication Profile wasn't viewed in the last 2 hours, it automatically displays in Rx Detail. Select **OK** once you have finished reviewing the EHR Profile.

   NOTE: If the EHR Profile cannot be loaded within 10 seconds, a prompt will appear with the options to bypass the forced view or continue waiting. If **Yes** is selected to the prompt, you can proceed without viewing the Profile

6. Deselect the **EHR** checkbox.



7. Select **OK**. A processing message displays for the retraction of the DUR from the EHR. Once successful, the DUR is removed from the EHR but remains on the patient's local Profile.
8. Select **Save**.

Batch Processing

Batching allows prescriptions to be dispensed as a group and processed without direct user intervention. Batching can be performed for compliance and regular retail prescriptions.

For a batch to run, a user must be logged into an active EHR session. A pharmacist's credentials, if logged in, are used when transmitting a batch running in the background. If a pharmacist is not logged into the EHR, Propel Rx selects the credentials of the next available user (e.g., Pharmacy Technician, Pharmacy Assistant, etc.).

If no user is logged into the EHR when the batch runs, a "RSA session is null" validation error will be returned, and the batch will not be processed. Once a user logs into the EHR, they can open the Batch Profile window, highlight all prescriptions using the Select All button, and then Submit. The credentials of the user who selected the Submit button will be used for the EHR transmission.

Smarter & Faster

Scheduling a Time for a Batch

It is recommended that batches are scheduled to run during regular business hours. This ensures the batch will process since a user will be logged into the EHR.

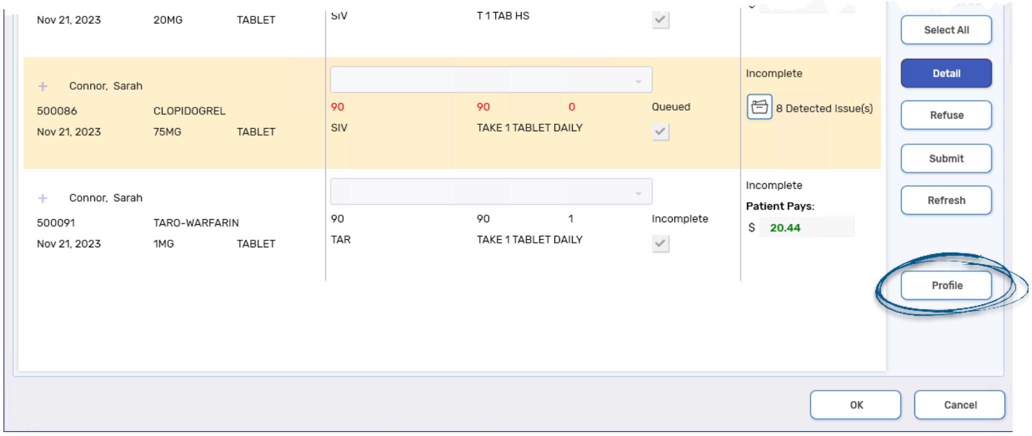
NOTE: A user does not need to be actively logged into Propel Rx, nor does Propel Rx need to be opened when a batch is processed. It's possible to exit Propel Rx without terminating an EHR session as outlined here.

Viewing the Patient Medication Profile From a Batch

Viewing the Patient Medication Profile is not mandatory when batching and prescriptions will not be stopped if you haven't viewed it. However, you can view the Patient Medication Profile if you wish from the Batch Profile window as long as the patient is synced.

To view the Patient Medication Profile from a batch:

1. Do one of the following:
    - On the left navigation menu, select the **Batch Manager** navigator button. In the Batch History tab, highlight the batch and select **Detail**.
    - Highlight a batched prescription from the Workbench and then select **Rx** > **Batch**.
2. Highlight a prescription for the applicable patient.
3. Select **Profile**. The Patient Medication Profile opens.

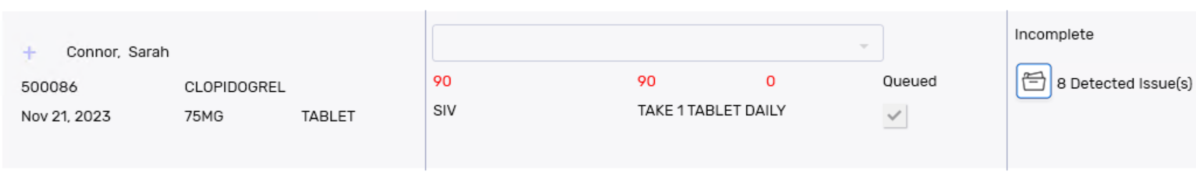


Viewing Detected Issues From a Batch

Any Detected Issues returned for a batch are visible from the Detected Issue(s) folder within the Batch Profile window.

To view Detected Issues from a batch:

1. Open the Batch Profile using one of the following methods:
    - On the left navigation menu, select the **Batch Manager** navigator button . In the Batch History tab, highlight the batch and select **Detail**.
    - Highlight a batched prescription from the Workbench and then select **Rx** > **Batch**.
2. Select the folder button beside the **Detected Issue(s)** field on the prescription row to view the Detected Issues.



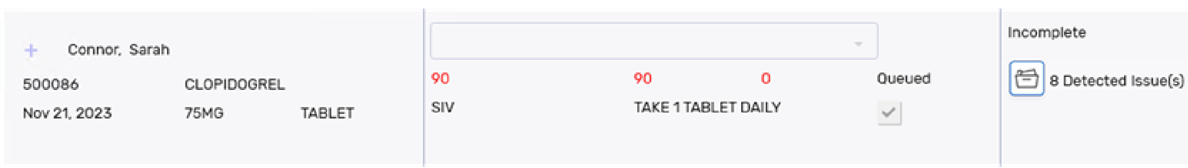
3. Double-click on a row. The Detected Issue Events window opens displaying additional information about the Detected Issue.
4. Select **OK** to retransmit the prescription to the EHR. If the Detected Issue was viewed in Rx Detail, retransmission occurs upon **Fill** or when **OK** is selected followed by **Submit** in the Batch Profile window.

Managing Detected Issues From a Batch

Detected Issues can be managed directly from the Batch Profile window or by detailing the prescriptions from the same window. For errors where Issue Management cannot be entered, these must be managed from Rx Detail.

Managing Detected Issues From the Batch Profile

1. Open the Batch Profile window using one of the following methods:
    - On the left navigation menu, select the **Batch Manager** navigator button. In the Batch History tab, highlight the batch and select **Detail**.
    - Highlight a batched prescription from the Workbench and then select **Rx** > **Batch**.
2. Do one of the following:
    - Select the folder button beside the **Detected Issue(s)** field on the prescription row. The Detected Issues Maintenance window opens.



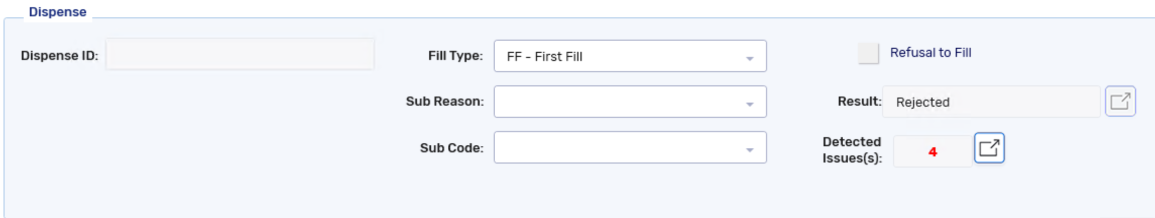
    - Highlight one or more prescriptions and then select **Submit**. The Detected Issues Maintenance window opens one-by-one.

   From the Detected Issues Maintenance window, you can view, manage, and submit a prescription to the EHR.
3. Do one of the following:
    - If Issue Management can be entered, select an appropriate code from the dropdown list and enter comments if needed. Select **OK**. The prescription will be submitted to the EHR with the Issue Management and adjudicated.
    - If Issue Management cannot be entered, select **Cancel**. Depending on the issue, you may be able to proceed without entering Issue Management, or you may need to address the error (e.g., correct patient demographics in Propel Rx). For more information on managing Detected Issues, see Detected Issues and Issue Management.

Managing Detected Issues From Rx Detail

1. Open the Batch Profile window using one of the following methods:
    - On the left navigation menu, select the **Batch Manager** navigator button. In the Batch History tab, highlight the batch and select **Detail**.
    - Highlight a batched prescription from the Workbench and then select **Rx** > **Batch**.
2. Highlight the applicable prescription(s).
3. Select **Detail**. The prescription opens in Rx Detail.

4. In the **EHR** tab, select the expander button beside the **Detected Issue(s)** field. The Detected Issues Maintenance window opens.



5. Do one of the following:
   - If Issue Management can be entered, select an appropriate code from the dropdown list and enter comments if needed. Select **OK** or **Fill**.
   - If Issue Management cannot be entered, select **Cancel**. Depending on the issue, you may be able to proceed without entering Issue Management, or you may need to address the error (e.g., correct patient demographics in Propel Rx). For more information on managing Detected Issues, see Detected Issues and Issue Management.
6. If more than one prescription was detailed, the next one loads in Rx Detail. Repeat steps 4 – 5 for the remaining prescriptions.
7. If **OK** was selected in Rx Detail, in the Batch Profile window, highlight the prescriptions whose Detected Issues were resolved and then select **Submit**. The prescriptions will be submitted to the EHR and adjudicated.

Processing a Batch for Non-Synchronized Patients

Like when prescriptions are manually filled outside of a batch, prescriptions for non-synchronized patients cannot be processed in a batch until a sync is attempted. This does not apply for patients with an acceptable non-EHR Patient Status.

The following options are available for synchronizing the patient:

- Detail the prescription and synchronize the patient from the Patient Folder in Rx Detail.
- Synchronize the patient from the Patient Folder and resubmit the prescription within the batch.

Synchronizing a Patient From the Batch Profile

1. Open the Batch Profile window using one of the following methods:
   - On the left navigation menu, select the **Batch Manager** navigator button. In the Batch History tab, highlight the batch and select **Detail**.
   - Highlight a batched prescription from the Workbench and then select **Rx** > **Batch**.
2. Highlight a prescription for the non-synchronized patient.
3. Select **Detail**. The prescription opens in Rx Detail.
4. Select the folder button in the Patient section. The Patient Folder opens.

5. Synchronize the patient. For more information, refer to Synchronization Scenarios.

   NOTE: If the patient does not exist on the EHR, you will be permitted to process the batch after you have attempted to search for the patient in the EHR.

6. In the Batch Profile window, highlight the prescription(s) for the newly synchronized patient.
7. Select **Submit**. The prescriptions will be submitted to the EHR and adjudicated.

Synchronizing the Patient and Resubmitting the Batch

1. Select the Patient navigator button on the left menu.
2. Search for and select the non-synchronized patient.
3. Synchronize the patient. For more information, refer to Synchronization Scenarios.

   NOTE: If the patient does not exist on the EHR, you will be permitted to process the batch after you have attempted to search for the patient in the EHR.

4. Open the Batch Profile window using one of the following methods:
   - On the left navigation menu, select the **Batch Manager** navigator button. In the Batch History tab, highlight the batch and select **Detail**.
   - Highlight a batched prescription from the Workbench and then select **Rx** > **Batch**.
5. Highlight the prescription(s) for the newly synchronized patient.
6. Select **Submit**. The prescriptions will be submitted to the EHR and adjudicated.

Processing a Batch When the Network is Down

If the EHR Network is down when a batch is processed, the first prescription that fails to transmit to the EHR is added to the EHR Queue. Even though the prescription wasn't accepted by the EHR, it will still adjudicate to third parties according to its billing codes. The same process will occur for all subsequent prescriptions in the batch. Once the network is restored, the prescriptions can be resent to the EHR from the EHR Queue. For more information, see Sending Transactions When the Network is Restored.

Patient Centre

Patient Centre is a companion application for Propel Rx that allows pharmacies to efficiently manage patient-focused services (PFS). If a claim can be billed for a PFS (i.e., Medication Review), a prescription is written back to Propel Rx and auto-processed. All PFS prescriptions will bypass the EHR as the Drug is not a true DIN/NPN (i.e., EHR Type = Non-EHR).

Technical Validation, Clinical Review, and Dialogue for a prescription can also be completed from Patient Centre.

Medication Review

A Medication Review in Patient Centre is divided amongst several tabs to facilitate the documentation of various components in a review. With EHR integration, some information is read-only in Patient Centre, while others can be updated but not transmitted automatically to the EHR.

Patient Tab

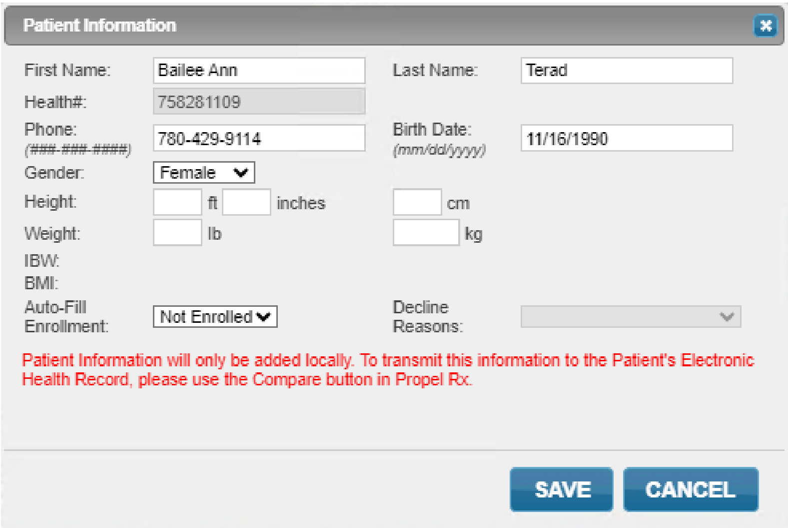
In the Patient tab, underneath the Lab Results button, the date that the patient was synchronized with the EHR is indicated. If the patient is not synced, this information is not displayed.

When a patient is synced, the following information is read-only in the Patient tab:

- PHN for synced patients
- Clinical Information

If you update the demographic information from Patient Centre using the Edit button, this information is written back to Propel Rx but not transmitted to the EHR. If information on the EHR is out of date, the patient must contact Alberta Health to correct it. Pharmacies cannot update patient demographic information on the EHR.

NOTE: The Compare button in the Propel Rx Patient Folder can only be used to copy demographic information from the EHR to Propel Rx. It cannot be used to transmit demographic updates to the EHR.



Medication Record Tab

If a prescription needs to be inactivated, you must do so from Propel Rx, as the feature is not available from Patient Centre for pharmacies with EHR integration.

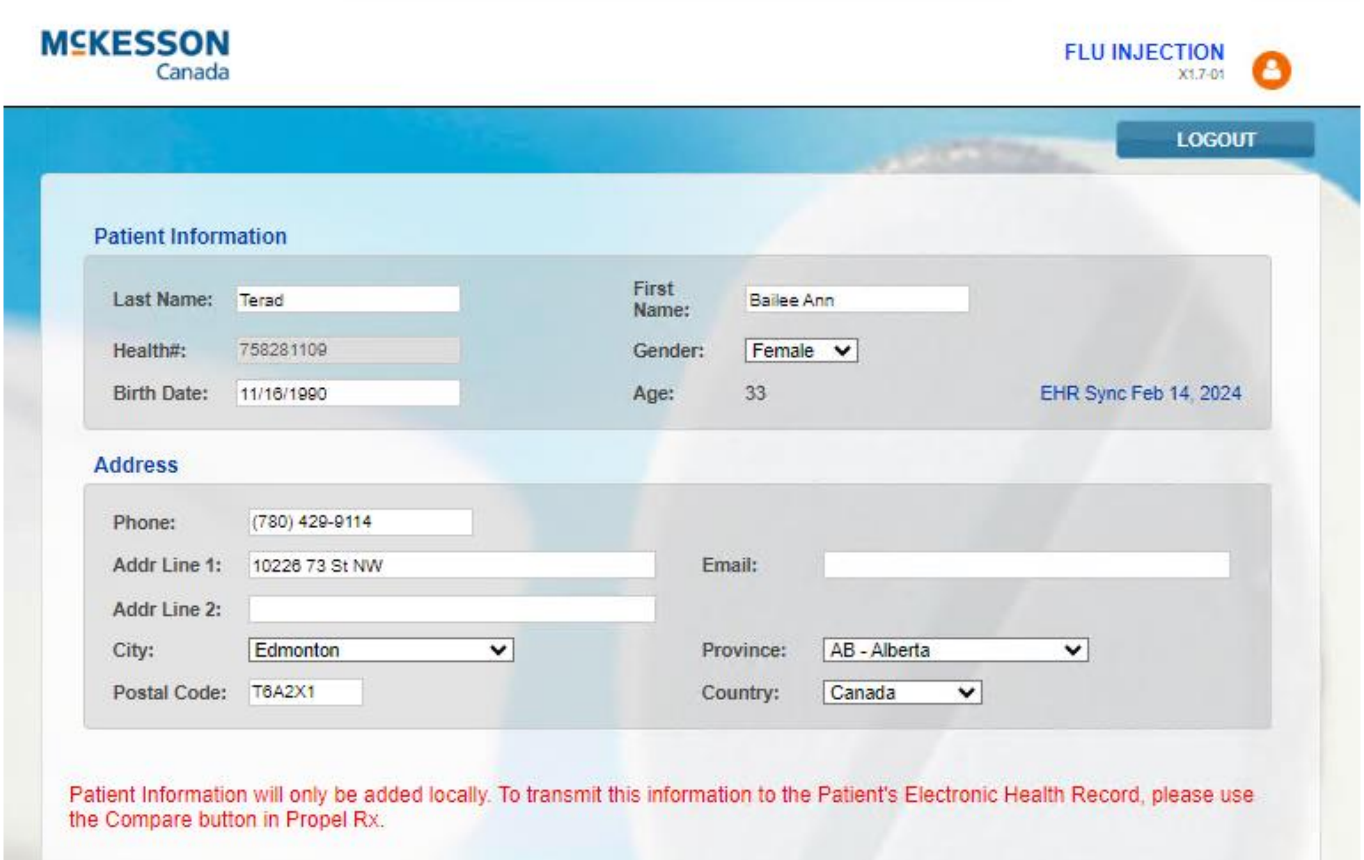
If you add a DUR from Patient Centre, this information is written back to Propel Rx but not transmitted to the EHR. You must return to Propel Rx and select the EHR checkbox for the DUR to transmit it. For more information, see Adding an Existing DUR to the EHR.

Flu Module

This section is only applicable to Independent stores.

The Flu Consent module in Patient Centre is used to document patient consent electronically for flu injection prescriptions. Like the Medication Review module:

- The EHR Sync date is indicated in the Patient Information section if the patient is synced.
- The PHN is read-only for synced patients.
- Updates to demographic information are written back to Propel Rx but not transmitted to the EHR. If information on the EHR is out of date, the patient must contact Alberta Health to correct it. Pharmacies cannot update patient demographic information on the EHR.



If a patient is created from the Flu Consent module, a corresponding unsynced Patient Folder will be created in Propel Rx. You must sync the patient from Propel Rx using the steps outlined in Synchronization Scenarios.

Technical Validation and Clinical Review

If Digital Workflow is enabled, Technical Validation and/or Clinical Review can be completed from within Propel Rx or in Patient Centre. This flexibility allows you to use a tablet instead of a workstation to complete these Workflow steps.

If the Dispense Pickup preference is set to Dispense, a Pickup message is transmitted to the EHR once the prescription completes Workflow in Patient Centre, and an authorized user with EHR access is logged in.

Detected Issues and Issue Management

In Propel Rx, local interaction checking is performed using an integrated drug information database when a prescription is processed. In addition to local interaction checking, issue detection is also performed by the EHR for EHR integrated pharmacies. Issues detected by the EHR can include clinical interactions, EHR business rule violations, or discrepancies with submitted information.

Clinical EHR issue detection occurs when:

- A new or reauthorized prescription is filled (i.e., an inferred prescription is created).
- A pharmacist prescribed medication is filled.
- An Allergy or Intolerance is added.
- A prescription's status is changed to Suspend or Active.

Clinical EHR issue detection does not occur when:

- A prescription is refilled.
- A prescription for a Natural Health Product (i.e., NPN), mixture, or Other Medication is filled.

NOTE: The EHR may return a warning when a prescription is filled for a NPN, mixture, or Other Medication, indicating there's not enough information to perform issue detection. Even in the absence of this warning, clinical issue detection will not be performed for these prescriptions.

Viewing Detected Issues

If a Detected Issue is returned, Propel Rx displays the details within the Detected Issues Maintenance window. This allows you to view and manage issues on an ongoing basis.

The Severity, Priority, and Description of these Detected Issues are generated by the EHR. Detected Issues are sorted with Drug to Allergy/Intolerance interactions prioritized before Drug to Drug interactions. Issues are further sorted in descending order by Priority and then, if applicable, by Severity.

The following chart displays the various types of Detected Issues that your pharmacy may encounter.

Type	Description
Error	The request could not be processed successfully and has been rejected because of a problem (e.g., patient PHN is invalid). Issue Management cannot be entered. The data must be corrected and re-submitted. A Severity will not be assigned to errors.

Warning	The request was successfully processed and transmitted to the EHR, but information was returned that requires acknowledgement by selecting OK (e.g., mismatch with prescriber's information). Issue Management is not required and cannot be entered.
Clinical Interaction	A Clinical Interaction can have an Error or Warning Priority. Depending on EHR User Preferences, Issue Management may or may not be required.

Once a Detected Issue has been reviewed or managed, it can be viewed again on the EHR Profile. You cannot view Detected Issues that have already been managed from the Rx Detail EHR tab.

To view a Detected Issue on the EHR Profile:

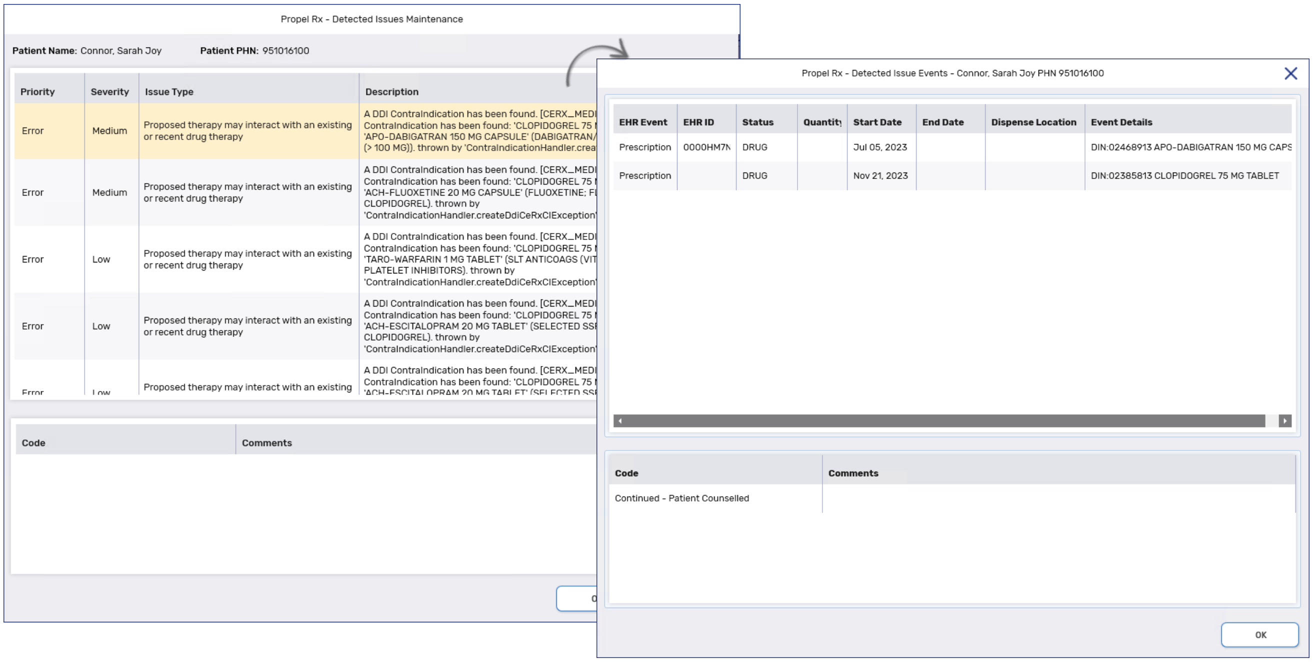
1. Do one of the following:
   - From the **Workbench**, highlight a prescription for the patient and then select **Rx** > **Profile**.
   - From the **Patient Profile**, select **Rx** > **Profile**.
   - From a **Workflow** window (i.e., Data Entry, Packaging, Technical Validation, Clinical Review), select **Rx** > **Profile**.
2. Select one of the Profile options.
   - If **Historical EHR Rx's** was selected, an additional window opens with the option to customize the number of days' worth of data to retrieve. By default, 180 days is auto-populated, but a maximum of 20 years can be entered. Enter the desired value and select **OK**.

     NOTE: If more than 180 days is entered, there may be a delay in retrieving the data.

   - If **EHR Rx Search** was selected, enter the EHR Rx ID in the window that opens and select **OK**. The EHR Rx ID can be found in the Create section of the Rx Detail EHR tab. This number is not the same as the prescription number in Propel Rx.

     NOTE: The EHR Rx Search is performed against the primary PHN initially. If the Rx ID is found on a patient's secondary PHN Profile, you can re-initiate a search by selecting the secondary PHN in the EHR Profile window.

   The EHR Profile window opens with the type of request indicated at the top.
3. If Detected Issues were returned for a prescription, a checkmark will appear in the **Issues** checkbox. On the EHR Profile, highlight the prescription.
4. Select **Detail**. The Rx Details window opens.
5. Select the folder button beside the **Detected Issue(s)** field to view the Detected Issues.
6. Double-click on a row. The Detected Issue Events window opens displaying additional information about the Detected Issue including the events (e.g., prescriptions, allergies) which caused the Detected Issues, as well as any previous Issue Managements that were recorded.



Managing Detected Issues

The bottom portion of the Detected Issues Maintenance window is used to enter Issue Management. Any user with EHR permissions in Propel Rx can enter Issue Management for a Detected Issue. For clinical interactions, whether Issue Management is required or not is determined by the EHR User Preferences.

If dispensing a prescription, adjudication cannot occur until all applicable Detected Issues are managed unless:

- The prescription is Deferred. For more information, see Deferring EHR Submission for Prescriptions.
- The Network is down. For more information, see EHR Network is Unavailable.

Managing a Detected Issue From the Detected Issues Maintenance Window

To manage a Detected Issue from the Detected Issues Maintenance window, do the following:

- If the Issue cannot be managed (e.g., DIN is invalid), the Add button in the Issue Management section will be disabled. Select **Cancel** and return to Rx Detail to make the correction before submitting again.
- If the Issue does not require management (e.g., Warning) the Add button in the Issue Management section will be disabled or hidden. Select **OK**. Propel Rx continues processing the transaction.

NOTE: By selecting **OK**, you acknowledge that you have viewed the Detected Issue. If you select **Cancel**, the prescription remains queued until OK is selected in the Detected Issues Maintenance window.

- If the Issue requires management, select **Add** from the Issue Management section. An Issue Management row is added.
    1. Use your professional judgement to select an appropriate Issue Management code from the dropdown list. Only one code can be entered per Issue.

    2. *Optional*: To document additional comments about the Issue Management, enter text in the **Comment** field.
    3. If multiple Detected Issues were returned, the selected Issue Management code will be applied to the other non-highlighted Detected Issues. If you want to enter a different Issue Management code for a specific Detected Issue, highlight the applicable row and use the dropdown list to select another code.
    4. Select **OK** to retransmit the message with the Issue Management(s).

Once a Detected Issue has been reviewed or managed, it may be viewed again later. For more information, see Viewing Detected Issues.

Managing a Detected Issue From Rx Detail

If a Detected Issue cannot be managed at the time of filling the prescription, select **Cancel** in the Detected Issues Maintenance window. The Create or Dispense sections in the Rx Detail EHR tab will display Rejected in the Result field. The Detected Issue(s) field will display the number of Detected Issues that were returned, and the adjacent expander button will become enabled for entering Issue Management. The prescription will remain queued until the Detected Issue is managed. Select **Park** to place the prescription in the Parked Rx tile for management later.

To manage a Detected Issue from Rx Detail:

1. Process the prescription from the **Workbench**, **Patient Profile**, or **Parked Rx** tile. The prescription will open in Rx Detail with the EHR tab automatically selected.
2. Select the expander button beside the Detected Issue(s) field. The Detected Issues Maintenance window opens.

3. Use your professional judgement to select an appropriate Issue Management code from the dropdown list. Only one code can be entered per Issue.

4. *Optional*: To document additional comments about the Issue Management, enter text in the **Comment** field.
5. If multiple Detected Issues were returned, the selected Issue Management code will be applied to the other non-highlighted Detected Issues. If you want to enter a different Issue Management code for a specific Detected Issue, select the applicable row and use the dropdown list to select another code.
6. Select **OK** to retransmit the message with the Issue Management(s).

EHR User Preferences

Each user can set up their EHR User Preferences to determine if certain types of interactions detected by the EHR are returned as Detected Issues and whether Issue Management is required for them. These can be configured by severity for each type of interaction (Allergy, Intolerance, and Drug to Drug). A user has the flexibility to update their EHR User Preferences from within Propel Rx or directly on the Pharmaceutical Information Network (PIN).

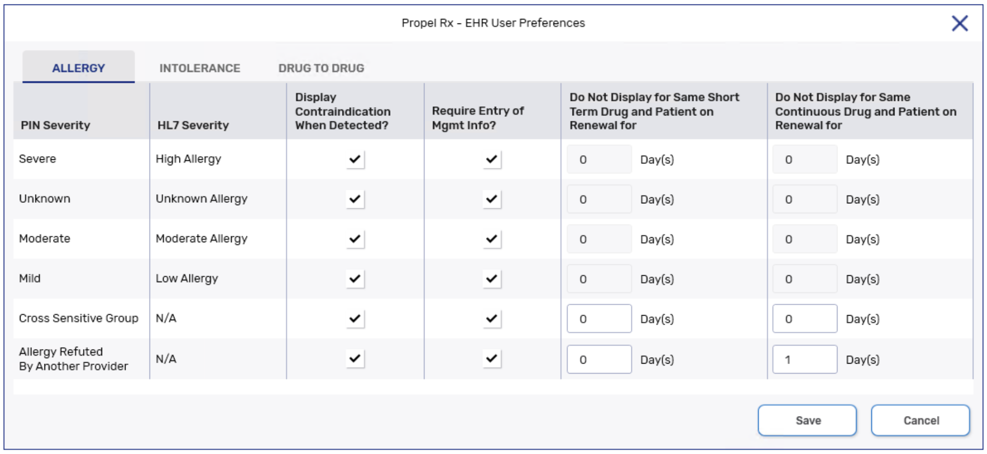
As required by the EHR, a user must review their EHR User Preferences regularly. The review period defaults to every 180 days but the frequency can be changed on PIN. Warning prompts appear upon login to the EHR in the following situations:

- If the preferences were changed by Alberta Health at a system level since the last login to the EHR.
- If a review was never completed or the review date has passed. After acknowledging the warning, the user should proceed with completing a review, as outlined in the steps below. Otherwise, the user will continue to see the warnings until a review is completed.

If the EHR Network is down, you must wait till the Network is restored before setting your EHR User Preferences.

To set EHR User Preferences:

1. Select **More** (**...**) > **Alberta** > **EHR User Preferences**. The EHR User Preferences window opens.



PIN Severity	HL7 Severity	Display Contraindication When Detected?	Require Entry of Mgmt Info?	Do Not Display for Same Short Term Drug and Patient on Renewal for	Do Not Display for Same Continuous Drug and Patient on Renewal for
Severe	High Allergy	✓	✓	0 Day(s)	0 Day(s)
Unknown	Unknown Allergy	✓	✓	0 Day(s)	0 Day(s)
Moderate	Moderate Allergy	✓	✓	0 Day(s)	0 Day(s)
Mild	Low Allergy	✓	✓	0 Day(s)	0 Day(s)
Cross Sensitive Group	N/A	✓	✓	0 Day(s)	0 Day(s)
Allergy Refuted By Another Provider	N/A	✓	✓	0 Day(s)	1 Day(s)

2. Select the applicable tab at the top.
3. For each type of interaction, review the following columns:
    a. **Display Contraindication When Detected** – select the checkbox if you want the interaction to display as a Detected Issue in Propel Rx.
    b. **Require Entry of Mgmt Info** – select the checkbox if you would like Issue Management to be entered for this Detected Issue. If selected, Issue Management will be required before the record is submitted to the EHR.
    c. **Do not Display for Same Short Term Drug and Patient for** – enter the number of days you don't want the Detected Issue to appear again for the same patient and short term (aka acute) drug.
    d. **Do not Display for Same Continuous Drug and Patient for** – enter the number of days you don't want the Detected Issue to appear again for the same patient and continuous (aka chronic) drug. A maximum of 750 days can be entered in this field for Drug to Drug interactions.

NOTE: Certain preferences cannot be customized by the user. If the preference is not configurable, the field will be disabled.

NOTE: If the number of days field is left blank, the field reverts to the previous value upon tabbing or saving. Negative or alphanumeric values are also not accepted in this field.

4. Repeat step 3 for the other tabs you want to configure.
5. Select **Save**. If a Detected Issue is returned by the EHR, appropriate action must be taken before the preferences are saved. For example, a Detected Issue will appear if the **Require Entry of Mgmt Info** checkbox is selected but the **Display Contraindication When Detected** checkbox is not, as these two preferences are linked.

The changes will take effect immediately.

Sample Detected Issues

Review the common Detected Issues below for more information on how to manage them.

The PHN/ULI Submitted is no Longer Valid

The patient's primary PHN may have changed. You cannot submit transactions to the EHR using a patient's secondary PHN. To resolve this error, unsync and resync the patient with their new primary PHN or unsync the patient and create a new Patient Folder with the patient's primary PHN.

Priority	Severity	Issue Type	Description
Error	Unknown	The specified element did not pass business-rule validation	The PHN/ULI submitted is no longer valid. Please search for the valid/active PHN/ULI for this patient. [CERX_MEDIATOR_000044] : Secondary ULI is not allowed in this transaction. thrown by 'CeRxFillPrescriptionRequestValidator.validate'

Enter a DIN that is Exactly 8 Characters Long

This Detected Issue can occur when you transmit a DUR for a drug with an invalid DIN/NPN (e.g., mixture, free-form drug). To resolve this error, enter the EHR DIN/PIN in the Drug Folder or Mixture Folder before resubmitting the transaction.

Priority	Severity	Issue Type	Description
Error	Unknown	The specified element did not pass business-rule validation	Enter a DIN that is exactly 8 characters long. [DRUG_INFORMATION_001186] : [DRUG_INFORMATION_001186] Field 'din' on DrugProductLocator is invalid. thrown by 'DrugInformationRequestValidator.validate(RequestContext, DrugProductLocator)'

A DDI Contraindication has been Found

This Detected Issue indicates that there's an interaction between the dispensed medication and an existing medication on the patient's EHR Profile. Depending on your EHR User Preferences, you either need to acknowledge the issue by selecting OK or enter Issue Management. If Issue Management is required, the Add button in the Detected Issues Maintenance window will be enabled.

Priority	Severity	Issue Type	Description
Error	Medium	Proposed therapy may interact with an existing or recent drug therapy	A DDI Contraindication has been found. [CERX_MEDIATOR_000028] : A DDI Contraindication has been found: 'CLOPIDOGREL 75 MG TABLET' interacts with 'APO-DABIGATRAN 150 MG CAPSULE' (DABIGATRAN/ANTIPLATELETS; ASPIRIN (> 100 MG)). thrown by 'ContraindicationHandler.createDdiCeRxCIException'

A DAI Contraindication has been Found

This Detected Issue indicates there's an interaction between the dispensed medication and an Allergy recorded on the patient's EHR Profile. Depending on your EHR User Preferences, you either need to acknowledge the issue by selecting OK or enter Issue Management. If Issue Management is required, the Add button in the Detected Issues Maintenance window will be enabled.

Priority	Severity	Issue Type	Description
Error	Medium	Proposed therapy may be inappropriate or contraindicated because of a recorded patient allergy to the proposed product. (Allergies are immune based reactions.)	A DAI ContraIndication has been found. [CERX_MEDIATOR_000025] : A DAI ContraIndication has been found: TEVA-CEPHALEXIN 250 MG TABLET belongs to Cephalosporins thrown by 'ContraIndicationHandler.createDaiCeRxCIException'

PIN Cannot Resolve the Prescriber Identity

This Detected Issue indicates the prescriber's license number was not recognized by the EHR. You can acknowledge this Warning by selecting OK and the EHR transmission will proceed. The prescriber's license number will appear as blank on the EHR Profile.

Priority	Severity	Issue Type	Description
Warning	Unknown	The specified element did not pass business-rule validation	PIN cannot resolve the prescriber identity. Please find the correct provider identifier and correct it on your system. [CERX_MEDIATOR_000071] : Cannot resolve the prescriber identity thrown by 'DispensingEventCommand.checkUnresolvedProviderWarning'

Cannot Create the Allergy Review Record When an Allergen Exists

This Detected Issue can occur when you attempt to transmit a No Known Allergies state to the EHR, but the patient has Allergies recorded on their EHR Profile. You can perform an EHR Profile Compare to copy the Allergies from the EHR Profile to Propel Rx.

Priority	Severity	Issue Type	Description
Error	Unknown	The specified element did not pass business-rule validation	Cannot create the allergy review record when an allergen exists for this allergy type. [MEDICAL_PROFILE_001777] : The request would result in inconsistent data. thrown by 'AllergyMgmtImpl.createAllergyReviewRecord(Session, Encounter, CreateAllergyReviewRecordEventRequest)'

Cannot Discontinue/Hold the Prescription or Dispensing Permission Cannot be Revoked

These Detected Issues can occur when there's a mismatch between the prescription's status on the EHR and locally. You can perform an EHR Profile Compare to copy the prescription status from the EHR Profile to Propel Rx.

Priority	Severity	Issue Type	Description
Error	Unknown	The specified element did not pass business-rule validation	Cannot discontinue the prescription. It has been discontinued or cancelled. [PIN_001222] : Cannot place a stop on a prescription that is already stopped or cancelled. thrown by 'DrugProductPrescriptionImpl.stop(Session, Encounter, StopPrescriptionRequest, ProviderKey)'

Patient Information Does Not Match with Current Records

This Detected Issue can occur when there's a mismatch between the patient's demographic information on the EHR and locally. You can perform a Patient Compare to copy the demographic information from the EHR to Propel Rx.

Priority	Severity	Issue Type	Description
Error	Unknown	The specified element did not pass business-rule validation	Patient information does not match with current records (ULI, Family Name, Given Name, Date of Birth, Gender): Information in Request: [758281109, Po, Sarah, 19901116, F] Information on Record: [758281109, Terad, Bailee Ann, 19901116, F]. [CERX_MEDIATOR_000018] : Patient info does not match. thrown by 'CeRxPatientValidator.validate'

An EHR Alert Note Already Exists

This Detected Issue occurs when you attempt to transmit an EHR Data Alert note for a patient, but one already exists on the EHR Profile. You cannot add another EHR Data Alert note until the existing one is removed.

Priority	Severity	Issue Type	Description
Error	Unknown	The specified element did not pass business-rule validation	An EHR Alert note already exists. A patient profile can only have one. [MEDICAL_PROFILE_003022] : Cannot add another EHR alert note because a patient profile can only have one. thrown by 'PatientAnnotationMgmtImpl.createPatientAnnotaion(Session,Encounter)'

Picking Up a Prescription

A prescription's Workflow status can be modified to Picked Up manually or via POS integration.

For a Pickup message to transmit, a user must be logged into an active EHR session. A pharmacist's credentials, if logged in, are used when transmitting a Pickup message. If a pharmacist is not logged into the EHR, Propel Rx selects the credentials of the next available user (e.g., Pharmacy Technician, Pharmacy Assistant, etc.).

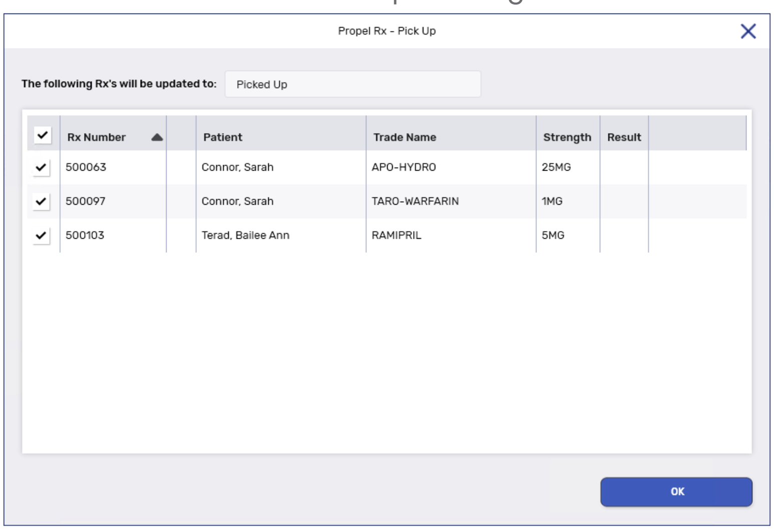
Changing the Pickup Status Manually

Changing the Pickup Status From the Pick Up/Delivery tile

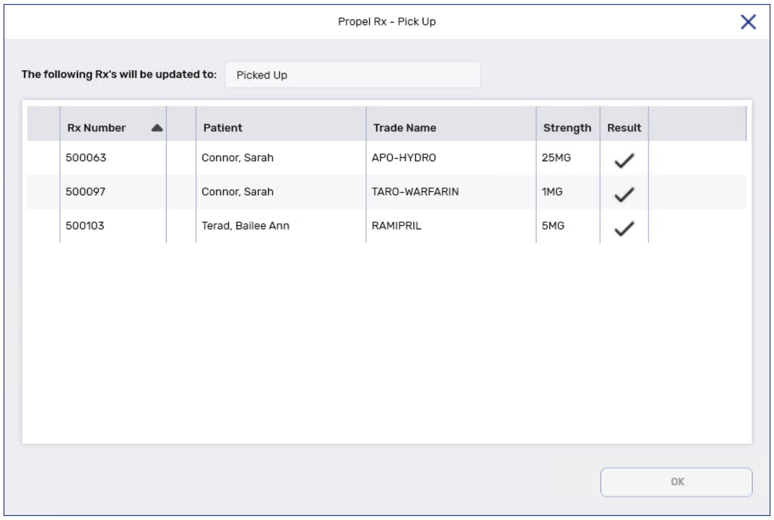
This section is only applicable to Independent stores. Manual Pickup messages can only be transmitted from the Rx Detail EHR tab for Corporate stores.

To manually modify the prescription Workflow status to Picked Up from the Pick Up/Delivery tile:

1. On the Workbench, select the **Pick Up/Delivery** tile.
2. Select the prescription(s) whose Pickup status you wish to change.
3. Select **Pick Up**. The Pick Up window opens.
4. Select **OK** to submit the Pickup messages to the EHR.



Once successful, the Result column is populated with a checkmark and the prescription vacates the Pick Up/Delivery tile. The Pickup date is recorded in Workflow Details and on the EHR Profile for the Dispense.

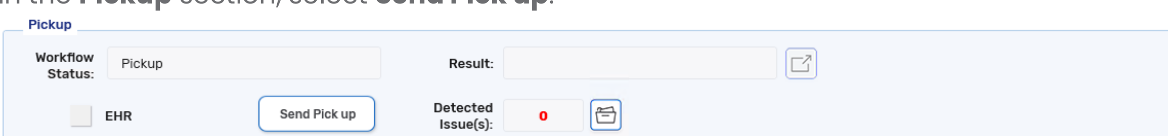


NOTE: If the Pickup message fails to transmit to the EHR, the Result column in the Pick Up window will still display a checkmark, but the prescription will remain in the Pick Up/Delivery tile with a failed indicator . The Sold Date and Time in the Workflow Details window will reflect the date and time the prescription was picked up in Propel Rx, regardless if the Pickup message was successful; it will not be updated when the Pickup message is sent successfully.

Changing the Pickup Status From the Rx Detail EHR tab

To manually modify the prescription Workflow status to Picked Up from the Rx Detail EHR tab:

1. **Detail** the prescription from the Patient Profile, Workbench, or Pick Up/Delivery tile. The prescription opens in Rx Detail.
2. Select the **EHR** tab.
3. In the **Pickup** section, select **Send Pick up**.



A processing message displays for the transmission of the Pickup message. Once successful, the Workflow Status changes to Picked Up, the Result changes to Accepted, and the EHR checkbox is selected. The Pickup date is recorded in Workflow Details and on the EHR Profile for the Dispense.

Changing the Pick Up Status Through POS Integration

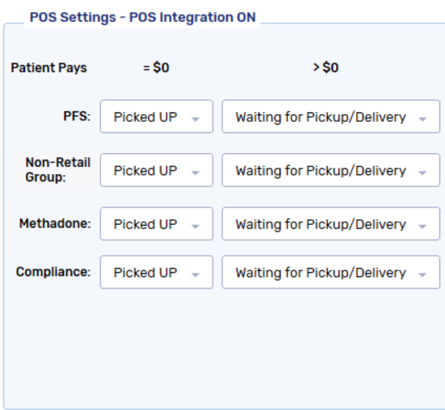
If POS integration is enabled, the Pickup message is sent upon scanning the prescription at the POS till. Any prescription not scanned remains in the Pick Up/Delivery tile and the Dispense Pickup date remains blank on the EHR until the prescription is marked as Picked Up.

Workflow Preferences can also be configured to set certain types of prescriptions to Picked Up automatically depending on the Patient Pays amounts. This means, you can bypass scanning these prescriptions at the POS till. PFS, non-retail group, methadone, and/or Compliance Pack prescriptions can be configured in this way.

NOTE: For Corporate stores, the POS Pickup settings are disabled. PFS, non-retail group, methadone, and Compliance Pack prescriptions are automatically set to Picked Up once they complete Workflow if Patient Pays = $0.

To configure POS Pickup settings:

1. Select **More** (...) > **Pharmacy**.
2. Select the **Workflow** tab.
3. In the **POS Settings** section, for each type of prescription, select the Workflow status when Patient Pays = $0 and when it's greater than (>) $0.
    - **Picked Up** means the prescription will change to a Picked Up status after the last Workflow step is complete.
    - **Waiting for Pickup/Delivery** means the prescription will change to a Picked Up status after it's scanned at the POS till.



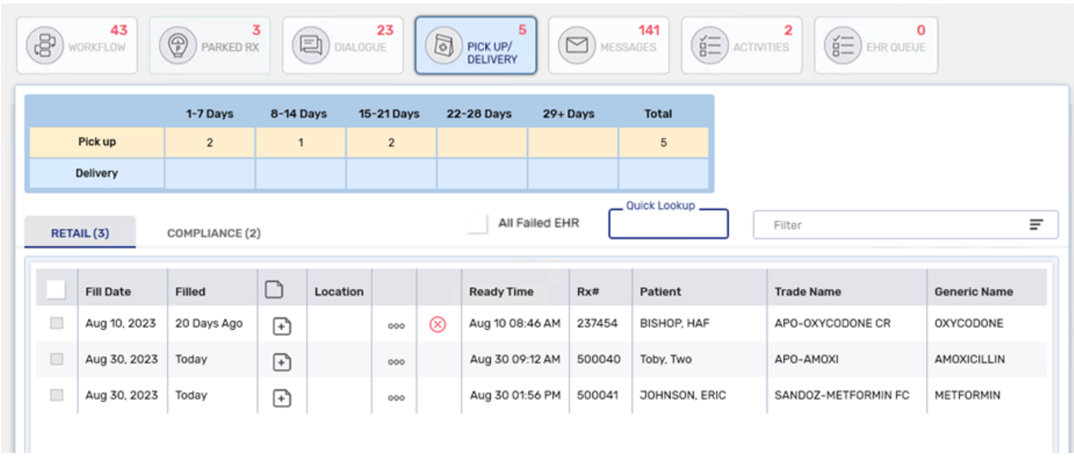
4. Select **Save**.

Resending a Failed Pickup Message

When an EHR Pickup message fails, the prescription remains in the Pick Up/Delivery tile with a red x icon ⊗. By default, Propel Rx displays the last 60 days' worth of prescriptions waiting for pick up in the Pick Up/Delivery tile. However, you can select the **All Failed EHR** checkbox to display all prescriptions that failed to be picked up on the EHR regardless of timeframe, in addition to the last 60 days' worth of prescriptions waiting for pick up.

NOTE: The counter on the Pick Up/Delivery tile will always reflect the number of prescriptions waiting for pick up in the last 60 days, regardless if the All Failed EHR checkbox is selected.

You must review the prescription and attempt to resolve the reason for the failed Pickup to remove the prescription from the Pick Up/Delivery tile.



To resend a failed Pickup message for a prescription:

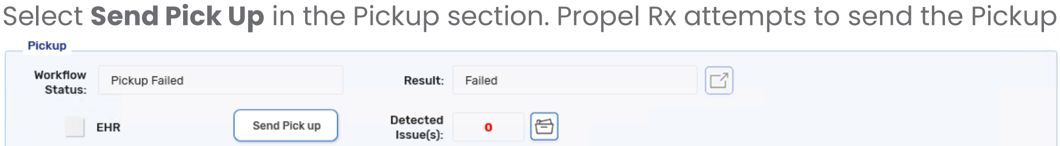
1. On the Workbench, select the **Pick Up/Delivery** tile.
2. Select the prescription(s).
3. Select **Pick Up**.

NOTE: For Corporate stores, Pickup messages can only be resent from the Rx Detail EHR tab. Skip to step 4.

4. If the Pickup message(s) fails again, select the prescription(s), and then **Detail**. The prescription opens in Rx Detail.
5. Select the **EHR** tab.
6. If Detected Issue(s) were returned, select the folder button in the **Pickup** section to review them. Perform any necessary actions to address them.

NOTE: Some errors cannot be viewed from the Detected Issues Maintenance window. One example is if your EHR or RSA session has expired. If you are not logged into the EHR, log in through **More** (…) > **Alberta** > **EHR Login**. Propel Rx will prioritize the pharmacist's login for Pickup messages. Therefore, ensure the pharmacist has an active EHR session before attempting to retransmit the Pickup message.

7. Select **Send Pick Up** in the Pickup section. Propel Rx attempts to send the Pickup message again.



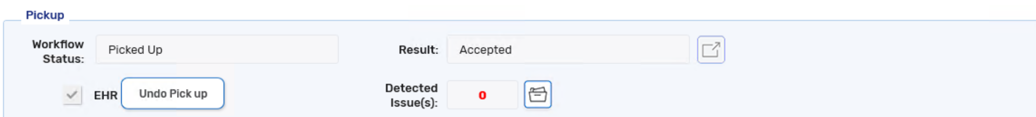
A processing message appears indicating the Pickup message is being sent to the EHR. If the Pickup message is successfully transmitted, the Workflow status is updated to Picked Up and the EHR checkbox is selected. The Pickup date is recorded on the EHR Profile for the Dispense but the Sold Date and Time in Workflow Details remains unchanged.

Retracting a Pickup Message

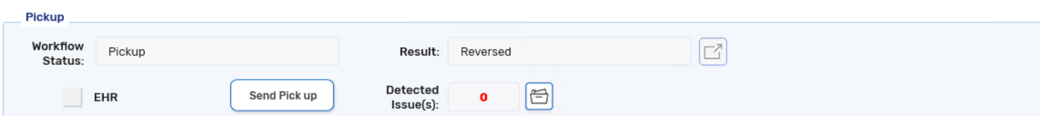
If a Pickup message was sent in error, you can retract the Pickup from the EHR. If the prescription was dispensed in error or a correction is required, the Pickup is automatically retracted upon refusing or rebilling the prescription. For more information, see Correcting a Prescription.

To retract a Pickup message:

1. Open the **Patient Folder**.
2. Select the **Profile** tab.
3. Select the prescription.
4. Select **Detail**. The prescription opens in Rx Detail.
5. Select the **EHR** tab.
6. In the **Pickup** section, select **Undo Pick up**.



A processing message appears indicating the information is being retracted from the EHR. If the retraction is successful, the Workflow status is updated to Pickup, and the Result indicates the transaction was Reversed.



Messages Tile

The Messages tile allows you to receive important electronic communications. These include Propel Rx notices and EHR Clinical Bulletins which alert you of issues that may pose a risk when using the EHR.

EHR Clinical Bulletins

EHR Clinical Bulletins, if available, are downloaded into Propel Rx weekly for users to view but may also be retrieved on demand. An EHR Bulletin is archived if it's updated, or its End Date has passed. All Bulletins, whether they're archived or not, can be viewed from the EHR Bulletins Messages window.

Forced Viewing of EHR Clinical Bulletins

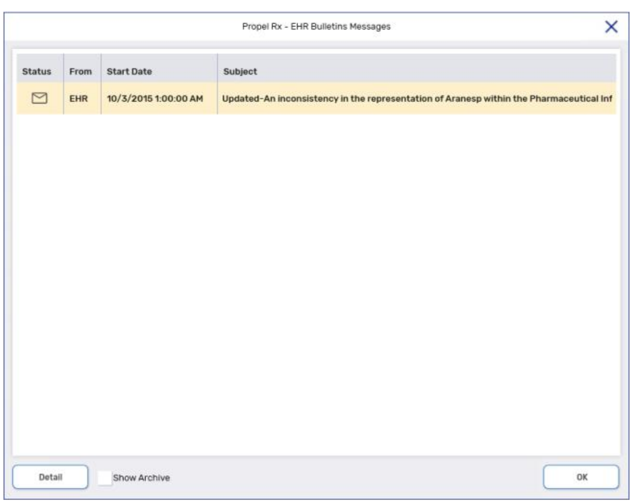
When you log into the EHR, the EHR Bulletins Messages window will open automatically if there are any non-archived Bulletins that you haven't viewed yet. From the window, you can detail the EHR Bulletins for more information which will mark the Bulletins as read. You will be forced to view EHR Bulletins until all active Bulletins are read. Updated Bulletins are not included in the forced view but can be viewed using the pagination controls.

Manually Viewing EHR Clinical Bulletins

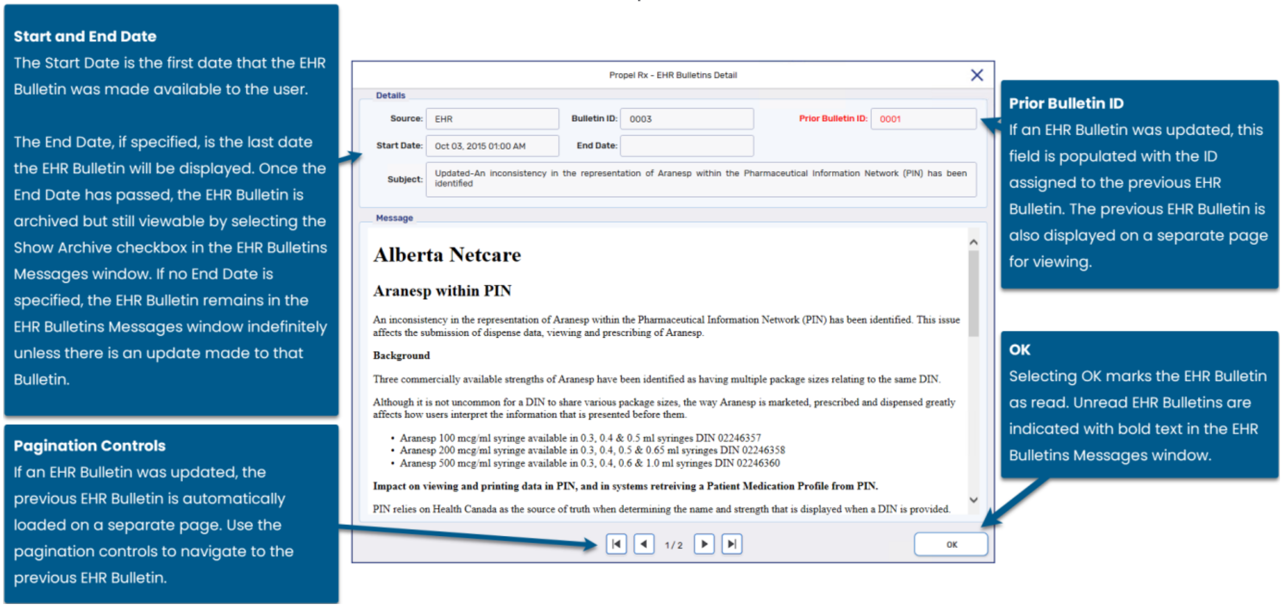
To manually view EHR Clinical Bulletins:

1. Select the **Messages** tile on the Workbench.
2. Select the **Get EHR Bulletins** button. The EHR Bulletins Messages window opens.
3. Highlight an EHR Clinical Bulletin.

NOTE: If you cannot see the Bulletin, it may be archived. Select the **Show Archive** checkbox to view a list of all EHR Clinical Bulletins.



4. Select **Detail**. The **EHR Bulletins Detail** window opens.



5. Review the **Subject** and **Message** details.
6. If the EHR Bulletin was an update to a previous Bulletin, select the pagination controls at the bottom to navigate to the next page.
7. Select **OK** to mark the EHR Bulletin as read.

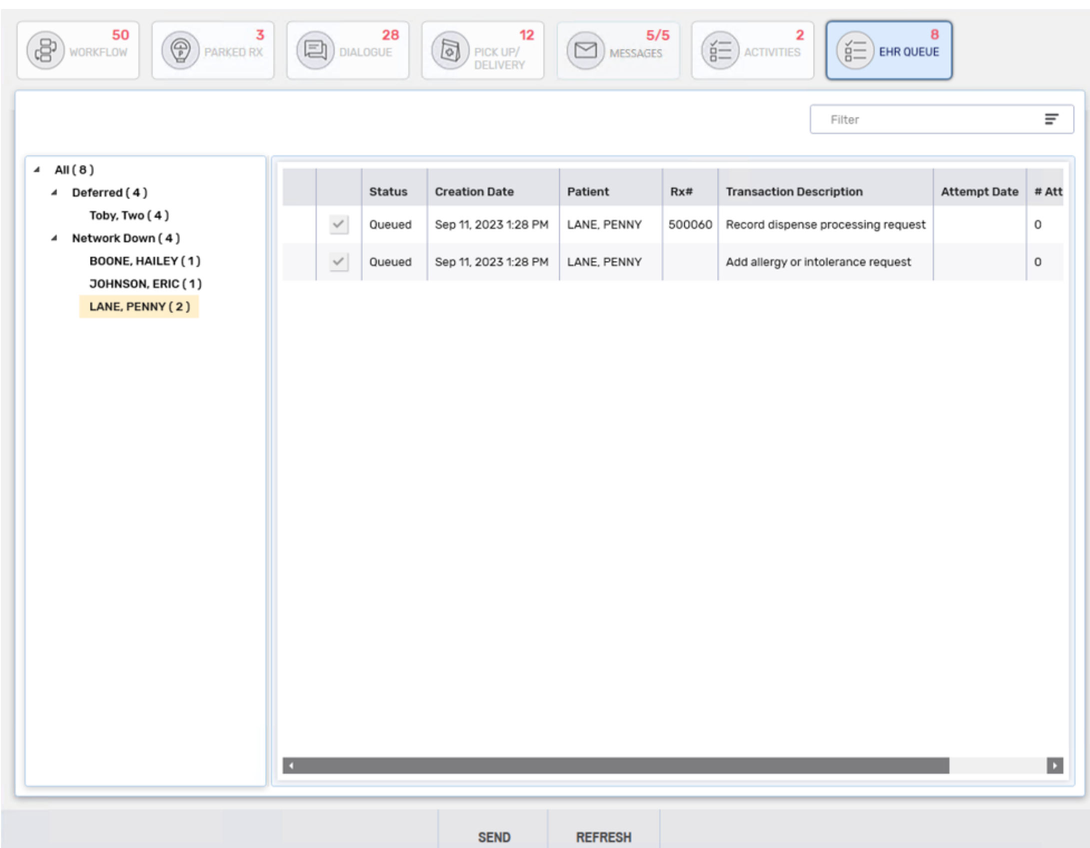
EHR Queue Tile

The purpose of an EHR Queue is to allow you to continue to service your patients and process prescriptions even if the EHR is temporarily unavailable. This tile manages any queueable transactions that were unable to be processed due to EHR Network unavailability.

One of the main advantages of the EHR Queue is there is no interruption of service to your patients when the EHR is unavailable. Prescriptions are successfully adjudicated, and a label set with correct pricing information is printed.

ALERT: Each pharmacy is responsible for ensuring that any failed or rejected EHR Queue transactions are resolved each day or once the EHR is available again.

When the EHR Network is down, transactions are queued in order of creation. This is because a prior queued transaction may have an impact on the processing of another downstream transaction (e.g., an Allergy must be sent before additional dispenses because the Allergy may interact with those medications). If a patient has any EHR queued transactions, then all subsequent transactions are queued and processed in order. No new transactions for a particular patient can be sent to the EHR until all queued transactions for that patient have been sent.



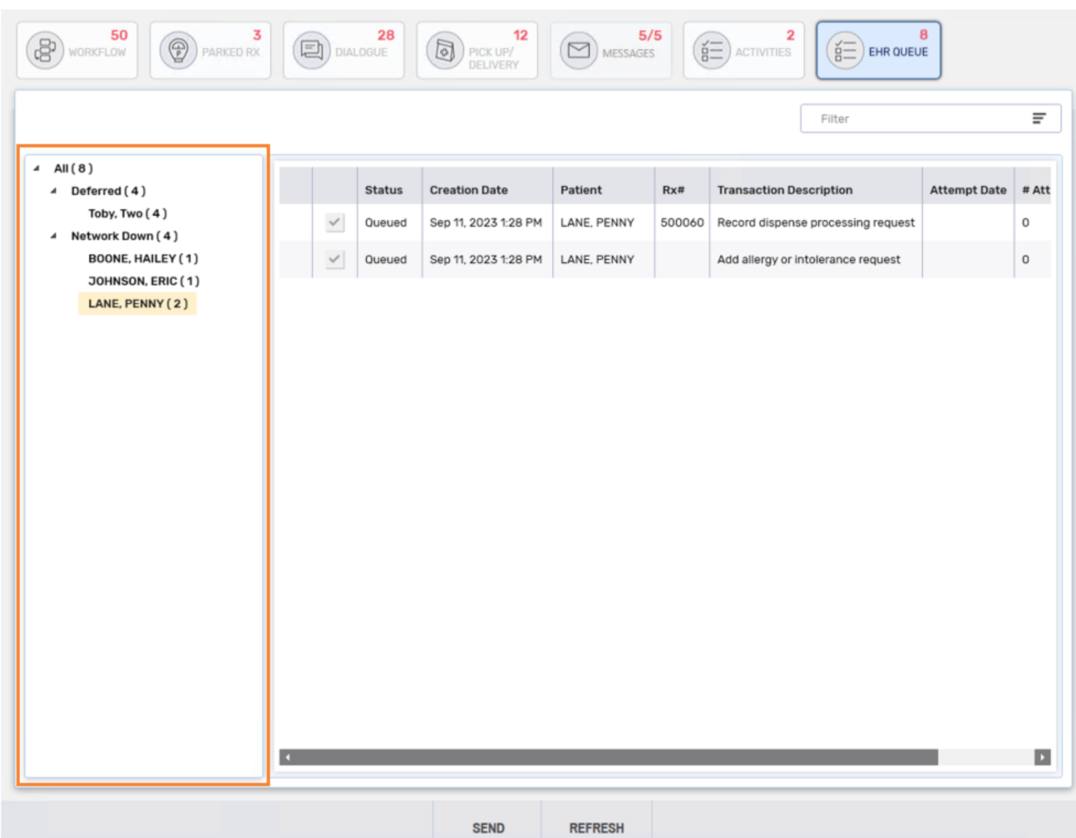
The EHR Queue tile displays a counter which indicates how many transactions reside in the EHR Queue. Within the tile, there are two sections: a transaction summary tree view and a detailed view of the queued transactions. The background colour of the text changes to yellow when the focus has been placed on that view.

Transaction Summary View

The Transaction Summary tree view is the left section of the EHR Queue tile. This view lists all EHR Queue transactions which can be expanded or collapsed.

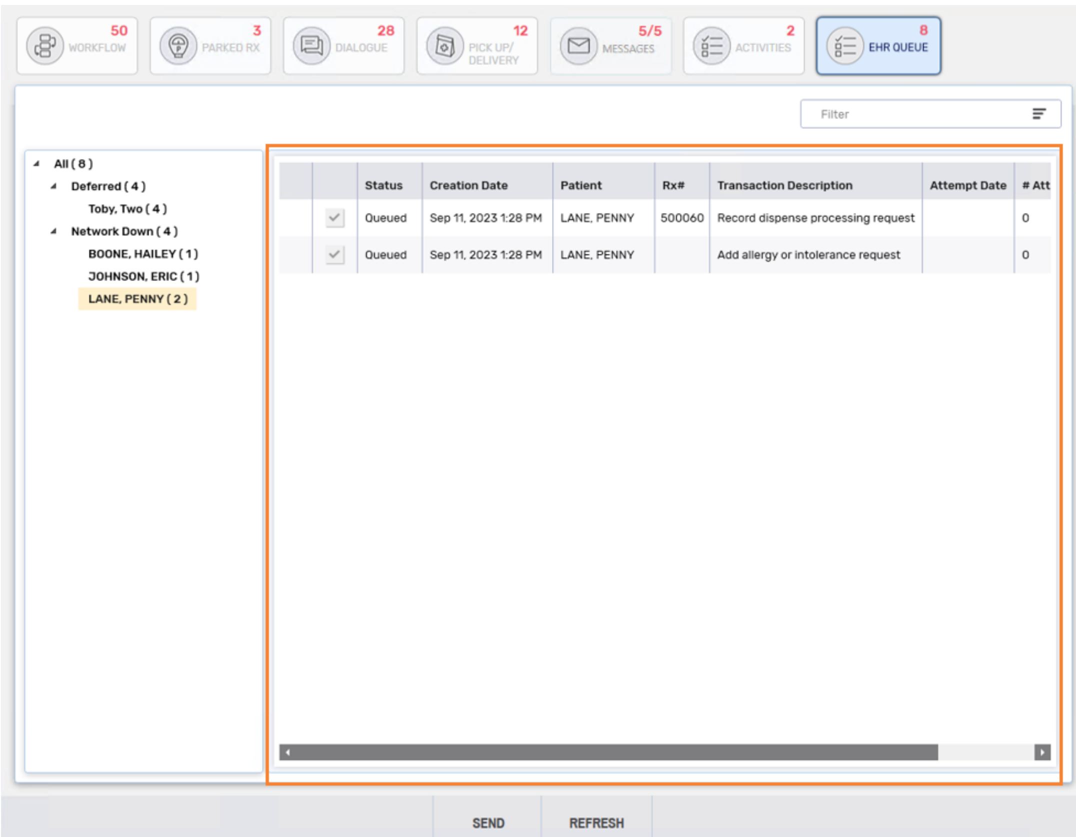
- **All transactions** – displays all transactions in the EHR Queue. This is a read-only view. To action a transaction, a queue type (i.e., Deferred, Network Down) or patient must be selected.
- **Deferred** – displays all transactions that were Deferred for EHR submission.
- **Network Down** – displays all transactions that were added to the EHR Queue due to the EHR Network being unavailable/unreachable.
- **Patient** – displays all transactions for the patient in the EHR Queue that were either Deferred or added due to a Network Down scenario.

Transactions are organized by creation date in ascending order. A counter beside each row indicates the number of transactions for that type or patient.



Detailed Transaction View

The Detailed Transactions view is the section to the right of the EHR Queue tile. The Detailed Transactions view lists all the EHR transactions that have been queued for a selected patient or queue type. Each row represents a detailed view for each transaction.



Refer to the table below for a description of each column in the Detailed Transaction grid.

Column	Description
Issues/Errors	A folder button allows you to view the details of the issue or error when a transaction has a status of Failed or Rejected. • Selecting this button displays the Detailed Issues Maintenance window for Rejected transactions or a message prompt for Failed transactions. • If the Patient Folder is not synced, the folder button is outlined in red. When selected, it opens the Patient Folder so you can perform a sync attempt. No transactions can be sent for a patient until they are synced.
Checkbox	The checkbox indicates which transactions are selected for sending.

	• If multiple transactions are associated with a prescription (e.g., Create, Dispense, Pickup), upon selecting the checkbox for one transaction, the other transactions are automatically selected. Similarly, if the checkbox is deselected for a transaction, all associated transactions are also deselected. • For Deferred prescriptions, the checkboxes are defaulted OFF and editable. For Network Down transactions, the checkboxes are ON and disabled. This is a safeguard to prevent transactions from being sent to the EHR in the wrong order.
Status	The current transmission status of the EHR queued transaction. • ***Queued*** – Message is waiting to be sent. • ***Started*** – Message is currently being sent. • ***Rejected*** – Message is rejected by the EHR with Detected Issues. You must attempt to manage the Issue(s). • ***Failed (Network still down)*** – Message transmitted unsuccessfully after a predefined number of attempts. • ***Not Sync*** – Patient is not synchronized with the EHR. • ***Deferred*** – Message was Deferred and has not yet been sent.
Creation Date	The date and time that the EHR queued transaction was originally created.
Patient	The name of the patient with EHR queued transactions.
Rx #	The prescription number for the transaction.
Transaction Description	The EHR queued transaction description.
Attempt Date	The actual date and time that the transaction was submitted.
# Attempts	When the EHR queued transaction is submitted, a counter keeps track of the total number of attempts and the current attempt number.
Initials	Each EHR queued transaction has a user associated with it. This is the user who is currently sending the message.

EHR Queue Buttons/Fields

Button	Description
Send	Sends the selected transactions to the EHR. • The Send button is enabled if the selected row(s) have an EHR Queue status of Failed, Queued, or Deferred. The button is hidden for all other statuses. • Selecting Send transitions the status of the first EHR queued transaction to Queued for the highlighted patient or queue type. Transactions are sent in order by creation date. • The # Attempts counter is reset. After 5 failed attempts, a prompt appears indicating the number of transactions that have been cancelled, rejected, or abandoned. These transactions remain in the EHR Queue. • If a Detected Issue is returned for a transaction, it must be managed and sent successfully before the next selected transaction is sent. Similarly, if the Network is still down when a transaction is sent, a prompt indicates this, and the remaining selected transactions are not sent. • A prompt indicates how many transactions were successfully sent.
Filter	Allows you to enter a description to filter for specific transactions. **NOTE:** The Date and Status columns are not filterable.
Refresh	Refreshes the EHR Queue view.
Detail	Opens Rx Detail as read-only. No changes can be made from this view. • Create, Dispense, Pickup, or Refusal to Fill transactions can be detailed. • If changes must be made, open the applicable folder (e.g., Patient, Prescriber, Drug) to make the necessary changes.
Refuse	Refuses the prescription. This can be a Create or Dispense transaction. • Once the Create or Dispense has been transmitted, the retraction is sent. • The order that transactions are sent are based on the creation date and the timestamp. If one transaction fails, downstream associated transactions are not sent.
Abandon	Allows you to remove a transaction from the EHR Queue. This button should only be used if every option has been exhausted to correct the prescription.

	• The Abandon button is enabled if the transaction has a status of Failed or Rejected. In the case of an unsynced patient, the Abandon button is enabled once a sync attempt has been performed. • If a Detected Issue is returned that is not manageable, a prompt appears upon sending the transaction which provides the option to abandon the transaction. • A reason must be entered for abandoning a transaction. This is recorded in the Patient Folder History tab. • Any associated transactions (e.g., Pickup, Reversal, Retraction) are also abandoned. • If a prescription must be abandoned, ensure the prescription is refused and resubmitted.

Abandoning a Transaction

An Abandon button is available in the EHR Queue. By selecting the Abandon button, you can remove the transaction from the EHR Queue. This button may be required if, for whatever reason, the claim cannot be corrected and submitted to the EHR through the normal process, or the patient does not exist in the EHR.

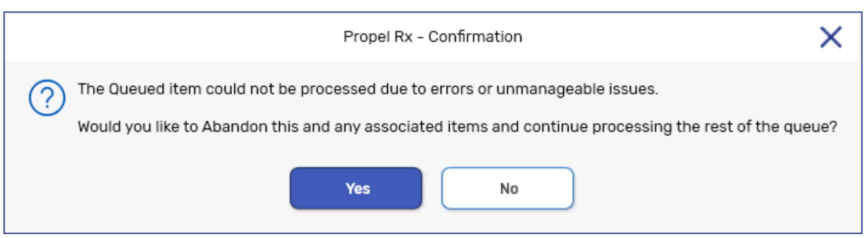
The Abandon button will be enabled for the following:

- Transactions with a Failed or Rejected status.
- Any transactions for an unsynced patient once a sync attempt has been performed. This includes transactions from the Deferred and Network Down queues.

To abandon a transaction:

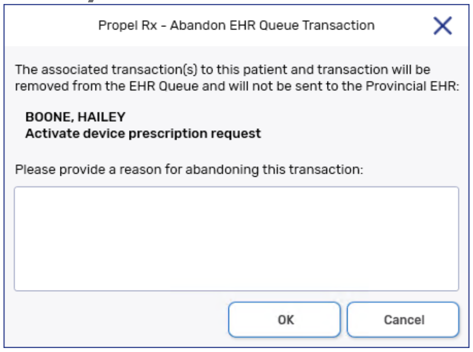
1. Highlight the transaction(s) in the **EHR Queue** tile.
2. Select **Abandon**. The Abandon EHR Queue Transaction window opens.

NOTE: If a Detected Issue is returned that cannot be managed when sending transactions from the EHR Queue, a prompt gives you the option to abandon the transaction.



- If **Yes** is selected, the Abandon EHR Queue Transaction window opens.
- If **No** is selected, you are returned to the EHR Queue tile and any remaining selected transactions from the EHR Queue are not sent to the EHR.

3. Enter a reason for abandoning the transaction. This entry will be recorded in the **Patient Folder History** tab in the **Comments** column.



4. Select **OK**.

ALERT: When the Abandon button is used, you may create mismatches in data between Propel Rx and the EHR. It is your pharmacy's responsibility to update your local records and/or the EHR to maintain accurate data. This can include correcting a prescription, adding notes, updating the status of a prescription or clinical record, etc.

EHR Network is Unavailable

When a transaction fails to send to the EHR, Propel Rx attempts to resend. After a maximum number of retries, the following prompt appears, and the transaction is placed in the EHR Queue:

If a patient has a transaction in the EHR Queue, a blue **Q** indicator appears in the following locations:

- Patient Folder information bar beside the patient name
- On the Rx Detail EHR tab if the transaction was for a prescription
- Beside the EHR checkbox for non-prescription transactions (e.g., notes, DUR)

If the Network is unavailable, you have the following options:

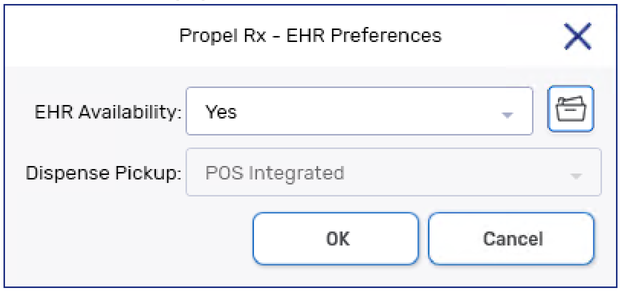
- Set the EHR Availability to No
- Continue Filling Prescriptions
- Stop Filling Prescriptions
- Park Prescriptions

Set the EHR Availability to No

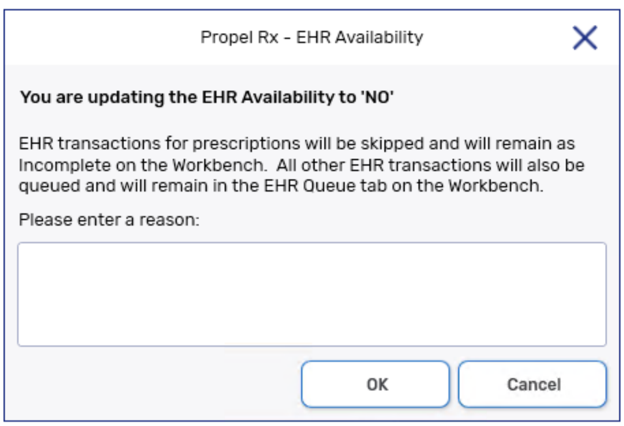
If the EHR Network is down for an extended period, you may set the EHR Availability to No. When the EHR Availability is changed, the EHR Availability window prompts you to enter a reason for changing this preference.

To change the EHR Availability to No:

1. Select **More** (…) > **Alberta** > **EHR Preferences**.



2. Select **No** from the **EHR Availability** dropdown list.
3. Select **OK**. The EHR Availability window opens.
4. Enter the reason for changing the EHR Availability. The reason can be viewed later by selecting the folder button in the EHR Preferences window.



5. Select **OK**.

When the EHR Availability is set to No, the following occurs:

- Queueable transactions (e.g., filling prescriptions, adding new Allergies, etc.) are automatically added to the EHR Queue tile.

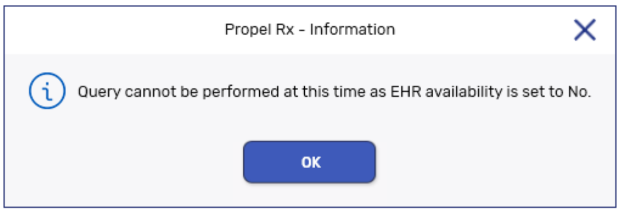
NOTE: The following transactions are not queueable:

- Searching for a patient
- Comparing a patient's information against the EHR
- Viewing EHR Bulletins

    - Requesting an EHR Profile
    - Performing a patient notes or clinical query
    - Viewing or updating EHR User Preferences
    - Logging in or logging out of the EHR
    - Changing an EHR Password

  After the Network is restored, these actions will need to be performed again if they're still required.

- The following prompt appears when you perform an action with the EHR (e.g., EHR patient search, EHR Profile query):

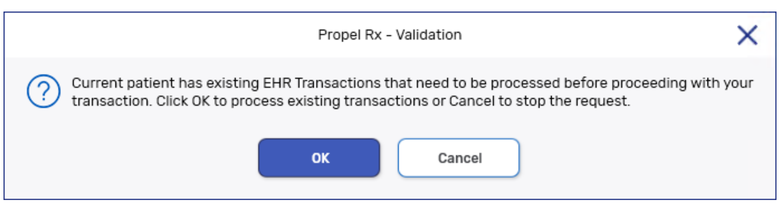


Continue Filling Prescriptions

When the connection to the EHR is lost or the Network is down, you can continue to fill prescriptions and attempt to connect to the EHR with each transaction (i.e., leave the EHR Availability as Yes).

When a transaction fails to send to the EHR, subsequent transactions for the same patient are automatically placed in the EHR Queue. Propel Rx does not attempt to connect to the EHR again until a prescription is filled for a different patient, or another prescription is filled for the same patient after a break in service (e.g., navigate to another Profile and return).

If transactions already exist in the EHR Queue for the patient, upon attempting to send another transaction, the following prompt appears:



- Select **OK** to process the existing transactions in chronological order. If the Network is still down, a prompt appears advising this.
- Select **Cancel** to not send the transactions, including the current transaction, to the EHR.

Stop Filling Prescriptions

You may choose to stop filling prescriptions until the connection to the EHR is restored (i.e., ask the patient to wait until the connection is restored).

Park Prescriptions

You may choose to fill a prescription until it reaches **Rx Detail** and then select **Park**. The prescription is then moved to the Parked Rx tile on the Workbench. At this point, the label cannot be printed.

When the Network is restored, the prescription can be processed from the Parked Rx tile and submitted to the EHR and Third Parties for payment. The label set can then be printed to be filed with the prescription.

Sending Transactions When the Network is Restored

When the EHR Network is restored, you can proceed to upload the transactions from the EHR Queue.

TIP: Open another instance of Propel Rx to send queued transactions so you can continue to fill prescriptions in your current session.

To send EHR Queued transactions:

1. If the EHR Availability was previously set to No, complete steps a – e below:
   a. Select **More** (...) > **Alberta** > **EHR Preferences**.
   b. Dropdown the **EHR Availability** field and select **Yes**. The EHR Availability window opens.
   c. Enter a reason for changing the Availability.
   d. Select **OK** to close the EHR Availability window.
   e. Select **OK** to close the EHR Preferences window.
2. Select the **EHR Queue** tile on the Workbench.
3. Select the applicable row from the tree view on the left.
   - If you want to send all Deferred or Network Down transactions, select the **Deferred** or **Network Down** row.
   - If you want to send transactions for a specific patient, select the applicable patient row.
4. On the Detailed Transaction view to the right, select the checkboxes for the transactions you wish to send.

   NOTE: Network Down transactions are automatically selected for sending from the Network Down queue. This is to ensure the transactions are sent in the appropriate order.

5. Select **Send**. Propel Rx sends the transactions in order by creation date.
   - If a Detected Issue is returned for a transaction, it must be managed before subsequent transactions can be sent. If the Detected Issue is unmanageable, a prompt gives you the option to abandon the transaction.
   - If a transaction fails to send after 5 attempts, a prompt appears indicating the number of transactions that were cancelled, rejected, or abandoned. These transactions remain in the EHR Queue.
   - The number of successful transactions that were sent are returned in a prompt.

Resolving Failed/Rejected EHR Transactions

When a prescription is not successfully transmitted to the EHR, the transaction remains in the EHR Queue tile, and the status will be one of the following:

- **Failed** – the EHR Network was unavailable.
- **Rejected** – the claim was rejected due to an error that must be resolved prior to resubmission.
- **Deferred** – claim was selected to temporarily bypass the EHR and has yet to be submitted.
- **Queued** – claim is waiting to connect to the EHR Network to be sent.

To resolve a failed/rejected EHR prescription:

1. From the Workbench, select the **EHR Queue** tile.
2. Highlight the prescription you wish to view.
3. Select the folder button next to the transaction you wish to view.
4. Resolve the error or enter Issue Management. Refer to the table below for more information on how to action different issues/statuses in the EHR Queue.

What is the issue/status of the transaction?	What does it mean?	What actions should I take?
Not Sync	The Patient Folder is not synced to the EHR.	Select the red folder button to open the Patient Folder and then proceed to synchronize the patient. Once synced, the transactions in the queue change to a Queued status.
Queued	The message is waiting to be sent.	Propel Rx sends the transactions in the appropriate order if more than one is being submitted. No action is required now.
Failed	The message was sent to the EHR but failed or a maximum number of attempts for the message was reached.	Send the transaction once the EHR connection is restored.
Rejected	The message was rejected by the EHR with a Detected Issue.	Correct the data or use Issue Management. For more information, see Detected Issues and Issue Management.
Started	The message is being sent.	No action is required now.
Deferred	The prescription was Deferred in Rx Detail and has not been sent.	Send the transaction.

6. Select **Send**.
7. Check the **EHR Queue** tile to ensure the transaction is no longer there.

Patient Merge

Propel Rx gives you the ability to merge Patient Folders. In Alberta, no message is transmitted to the EHR when a merge or unmerge is performed.

Merging Patients

When a patient merge is performed, one Patient Folder is removed from the database and the other is retained. The Patient Folder for the patient who is retained will include all the information from the patient that was removed. It is imperative that your pharmacy validates that the Patient Folders should in fact be merged prior to merging them.

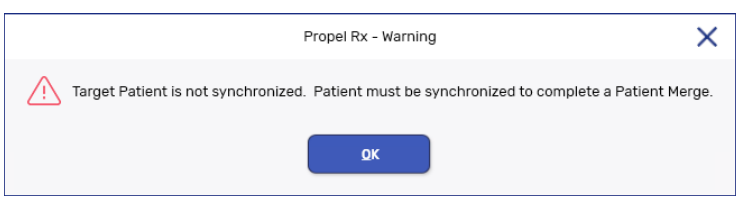
The Patient Merge window is separated into two sections: Target and Remove. Target contains the information for the Patient Folder that will remain and into which all other Patient Folder data will be merged. Remove contains the information for the Patient Folder which will be merged into the Target Patient Folder.

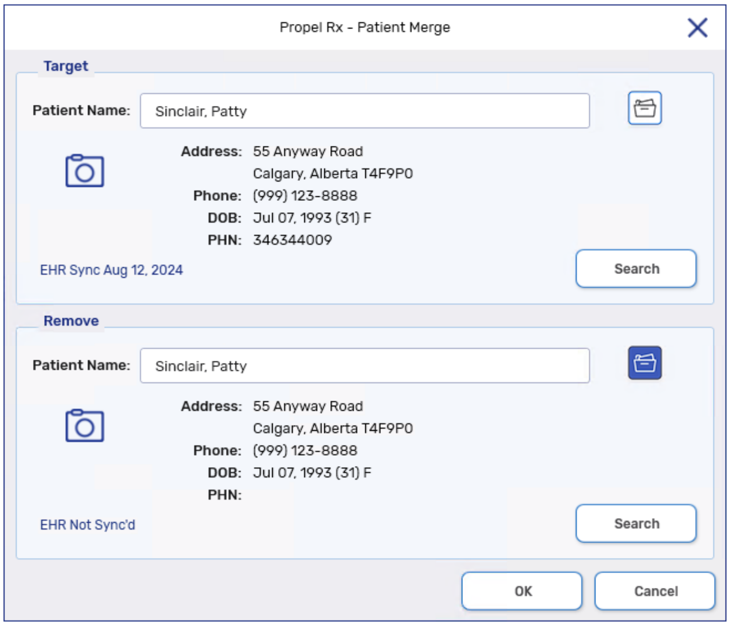
It is imperative to keep your patient records accurate and up to date. Avoid duplicates and ensure prior to synchronizing any patients that you confirm the patient is not in Propel Rx more than once.

To merge two Patient Folders:

1. Select **More** (...) > **Merge** > **Patient**. The Patient Merge window opens.
2. In the **Target** section, enter all or part of the name of the patient you wish to keep.
3. Select **Search** or the folder button.
4. From the results returned, select the correct patient, and then select **OK**.
5. In the **Remove** section, enter all or part of the name of the patient you wish to remove from the database.
6. Select **Search** or the folder button.
7. From the results returned, select the correct patient, and then select **OK**.
8. Verify that the Target and Remove patients are correct. Select **OK**.

NOTE: If the Target patient is not synchronized, a prompt will block you from completing the merge. The Target patient must be synchronized to complete the merge.





9. A validation prompt appears to confirm the merge. Select **Yes**.

Propel Rx performs the merging of the two Patient Folders. Depending on the size of the Patient Folders, the merge can take a few minutes to complete. Once the merge is successful, a prompt appears indicating the merge was successful.

Unmerging a Patient

If you have completed a patient merge in error, contact the PTS Customer Care team at 1-800-387-6093 option 2 and request an unmerge of the Patient Folders. You will be required to identify the target patient's name, birth date, gender, and address information.

Notes

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