axiUm eRx

eRx

User Guide for 7.03-7.07

Last reviewed: October 28, 2020

Contents

1 eRx Overview

Note: *The axiUm icons were refreshed in version 7.03 and the version of eRx was updated in 2019. Screen shots may display different icons and behave differently than your version of eRx.*

axiUm eRx is an optional axiUm+ module that integrates with axiUm to offer e-prescribing software. Accessed through the EHR module, it enables providers to perform drug interaction checks, access over 65,000 drugs on a national drug database, review which drugs are covered under insurance, and submit prescriptions electronically to the pharmacy of their choice.

This streamlines the prescription process by combining the searching and writing prescriptions into a simpler, automated process, eliminates paper prescriptions, and minimizes human error. eRx allows providers to update patient medications, problems and allergies in real time so that they do not need to be re-entered in axiUm. eRx also features built-in drug-to-drug and drug-to-allergy checking, formulary compliance, dose checking, and medication history, ensuring providers are stay up to date with current information and provide better patient care.

Note*: The axiUm eRx module is only available in the United States.*

Provider Identity Authentication

You must pass an identity authentication process before you can prescribe in eRx. This may also include the optional Electronic Prescribing of Controlled Substances (EPCS) Gold service; if enabled, active EPCS providers can also create prescriptions for controlled substances from axiUm eRx. If you are EPCS enabled, you can use electronic prescriptions for non-controlled substances, legend drugs, and controlled substances.

Note*: EPCS Gold service is only available if your state allows electronic prescriptions for controlled substances.*

For more information about passing identity authentication, see Appendix A: Identity Authentication.

2 Access and Organization

Access the eRx Module

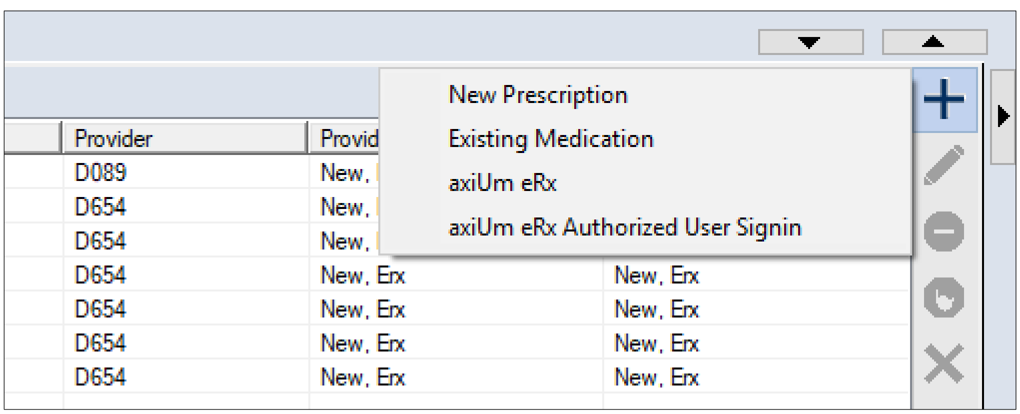
You must open the eRx module from within the EHR module.

Note*: If accessing eRx for the first time, you are prompted to accept the terms of use.*

1. With a patient selected, open the EHR module using one of the following methods:
    - **Nav Panel**: From the Nav Panel, under the **Clinical Treatment** section, complete one of the following:
        - Click the **EHR** menu-item or ( ) icon and from the **EHR** window, click the **Medications** tab.
        - Click the drop-down arrow ( ) and select the **Medications** sub-tab.
    - **Menu Bar:** From the **Actions** menu, select **EHR** and click the **Medications** tab.

    The **Medications** tab displays.

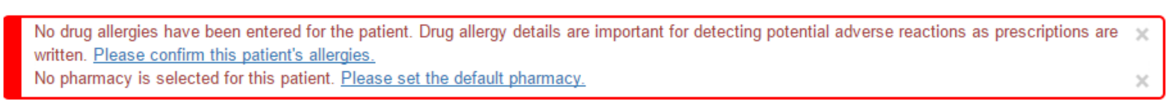
2. Click the **Add a new Record** ( ) icon and select **axiUm eRx** or **axiUm eRx Authorized User Signin**.



3. Enter your authentication credentials or swipe your card as necessary.

    The **axiUm eRx** window displays with the selected patient's information.

    Note*: If accessing eRx for the first time or with a new patient, no allergy or pharmacy information displays, and you are prompted to enter them.*



eRx Organization – Patient Info Screen

When the eRx module opens, the patient’s **Patient Info** screen displays. It is divided into two sections.

The upper section contains a **PatientAdvisor** banner, blue context bar with the patient name and basic identifying information, a **Pharmacy Messages** ( ) icon, and the location you are currently prescribing from.

- The **PatientAdvisor** banner allows you to review the **Clinical Decision Support** and **Medication Fill History** functionality. It displays across the page by default.

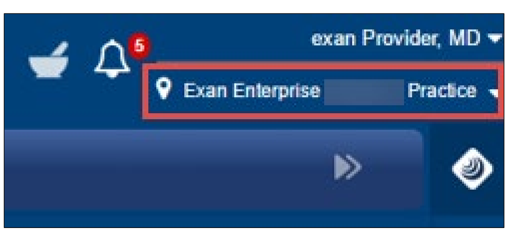
  Tip*: You can click the ( ) icon to close and click the ( ) icon to expand the* ***PatientAdvisor*** *banner as necessary.*

- The context bar lists the patient name and basic identifying information, such as birthdate, sex, and age, and allows you to create prescriptions, review favorite prescriptions, and add encounters.

  Tip*: From the context bar, you can click the patient name to reopen the* ***Patient Info*** *screen at any time.*

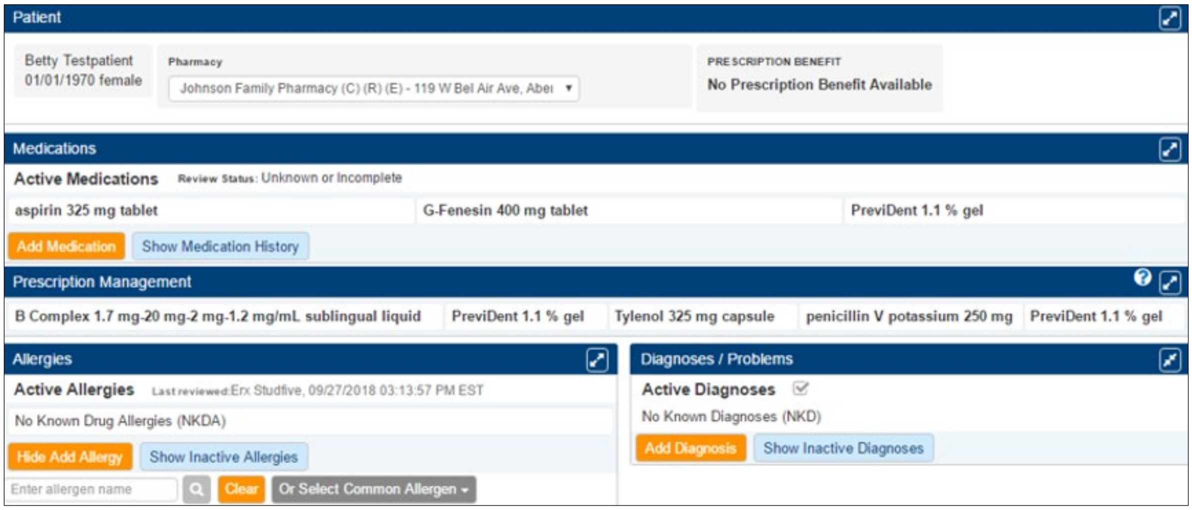
- You can click the **Pharmacy Messages** ( ) icon to review the practice’s renewal requests from pharmacies and open the **Pharmacy Message** widget.

- The top right-hand corner of the eRx module displays the location you are prescribing from. Review this to confirm the correct practice displays.



Tip*: If connected to multiple locations, you can click the location name, and select another location from the drop-down.*

The lower section contains a series of widgets with the patient's basic information, including demographics, medications, allergies, problems, and pending prescriptions.



- **Patient**: This widget lists the patient's information, including first and last names, contact information, date of birth, sex, prescriptions benefit, and specified pharmacy.

  The **Pharmacy** may list a maximum of five pharmacies for the patient. You can also search for new pharmacies and remove unneeded pharmacies, and obtain pharmacy information, such as NCPDP, address, phone, and fax.

  Prescription Benefit information is obtained from SureScripts and payer claims. If a patient has multiple plans, you can select the correct benefit plan. The information also allows eRx to alert users on medications that are on or off formulary and offer on-formulary alternatives when applicable.

- **Patient Encounter Management**: This widget allows you to add, edit, and remove patient's encounters as necessary to track accurately when the patient was seen in the clinic.
- **Medications**: This widget lists any active medications for the patient, and allows you to add new medications, start or stop medications, and renew or prescribe medications.
- **Allergies**: This widget lists any allergies the patient has and adverse reaction(s) to medications.
- **Diagnoses / Problems**: This widget lists any conditions, diagnoses, and symptoms by a patient has and allows you to add new problems by searching for the condition name or ICD-9, ICD-10, or SNOMED CT code.
- **Prescription Management**: This widget lists any prescriptions for the patient, including any sent from a provider or provider agent.

3 Work with Patients in eRx

From the **axiUm eRx** window, you can complete a variety of tasks related to your patient. This includes managing allergies, pharmacies, medications/prescriptions, problems, and related alerts and diagnoses.

Each time you see a patient, you should review their record with them. This includes, but is not limited to, their demographic information, active medication list, allergy list, and problem list.

Reviewing the record with the patient allows you to confirm you have the correct patient selected in eRx and ensure their record is still accurate.

***Important**: Any patient that will receive a prescription through eRx must have their first and last names, date of birth, gender, and contact information, including address, zip code, and primary phone number recorded in their Patient Card in axiUm.*

Manage Allergies

All patients that you access in eRx must have their drug allergy information managed as needed. Maintaining accurate allergy records increases patient safety; it helps prevent providers from prescribing medications with substances the patient is allergic to.

Within eRx, you can view a patient's listed allergies, add allergies, and manage any existing allergies.

To manage patient allergies:

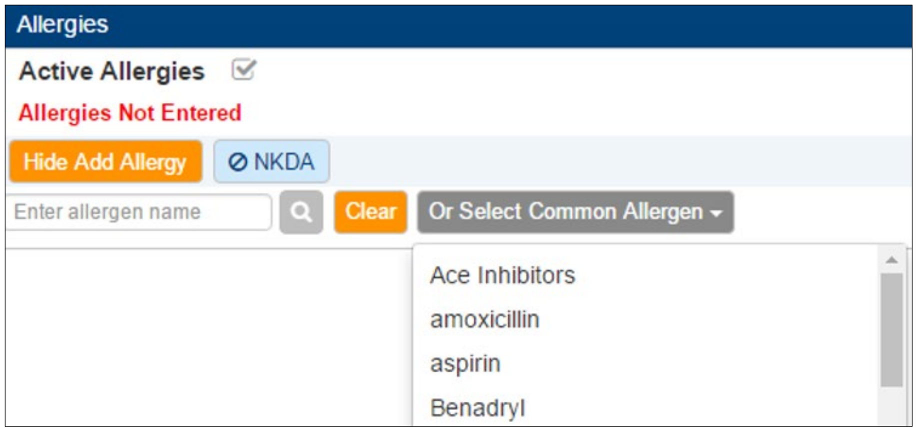
1. Open eRx to the **axiUm eRx** window and scroll to the **Allergies** widget.
2. Review the patient's listed allergies.

   ***Note**: If no allergies are listed, **Allergies Not Entered** displays.*

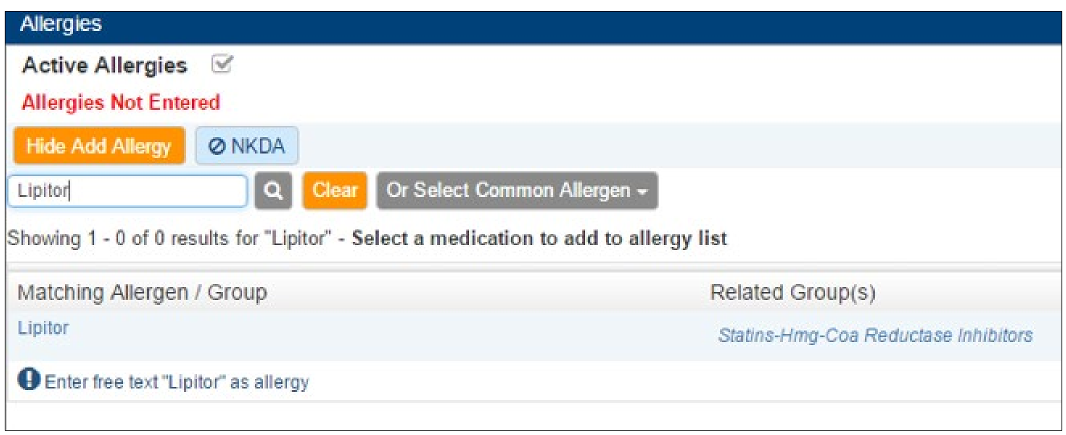
3. To add an allergy, complete the following:
   a. Click **Add Allergy**.

b. Complete one of the following:

- To indicate the patient has no allergies, click the **NKDA** button.
- To add a common allergy, from the **Select Common Allergen** drop-down list, select the correct allergy.



- To add a searchable drug allergy, enter the name in the search field, and select the correct allergy.
- To add a free text allergy, enter the name in the search field, and click the **Enter free text** link.

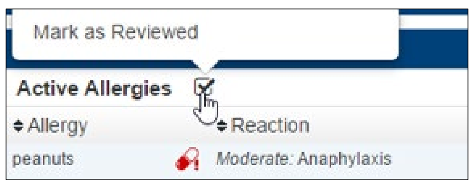
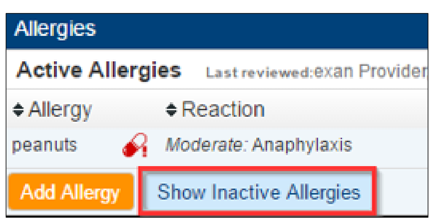


***Note**: If an ( ) icon displays next to an allergy, the allergy is free text so eRx does not conduct a drug-allergy check.*

c. Complete the fields as necessary and click **Save**.

Field	Description
Reaction	If known, select a reaction from the pre-populated drop-down list or enter a custom reaction in the text field.
Severity	If known, select a severity ranking from the drop-down list.
Onset Date	If known, select day/month/year that the allergy began from the drop-down lists or click the **Today** button to add today's date.

4. To perform another task, complete one of the following:

Task	Procedure
Review Allergies	At the top of the allergies list next to **Active Allergies**, select the check box. 
Inactivate Allergies	Next to a listed allergy, click the **Make Inactive** () icon. The allergy now displays under **Inactive Allergies** list and the **Date** column lists the date it was inactivated. ***Tip****: To view the* ***Inactive Allergies*** *list, click the* ***Show Inactive Allergies*** *button.* 
Reactivate Allergies	A deactivated allergy can be reactivated. Under **Inactive Allergies**, next to a listed allergy, click the **Make Active** () icon. The allergy now displays under **Active Allergies**.

Delete Allergies	Next to a listed allergy, click the **Delete** ( ) icon. The allergy is now listed in the **Inactive Allergies** section and next to the date, reads **Deleted**.
Find Allergy Match	An ( ) icon may display next to an allergy that was entered manually, indicating that the allergy requires a match in the system. a. Next to a listed allergy, click the **Find Match** ( ) icon. b. From the listed results, select an allergy with the matching keyword(s).

Manage Pharmacies

All patients must have at least one pharmacy associated with their patient record.

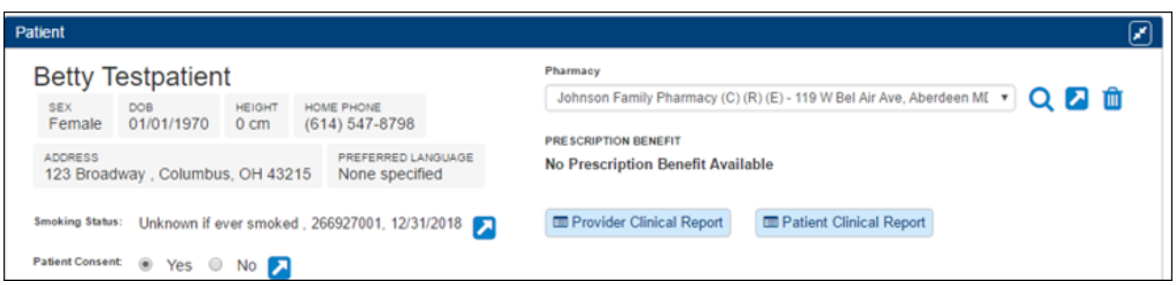
When you open eRx with a new patient, you are prompted to add a pharmacy for the patient before you can begin prescribing. You can add a prescription without a pharmacy, but you cannot send one eletronically without a pharmacy.

Note: *You can add a maximum of five pharmacies to a patient. If multiple pharmacies are added to a patient record, they display from the* ***Pharmacy*** *drop-down field within the* ***Patient*** *widget.*

Additionally, any patient that you access in eRx should have their pharmacy information maintained. You can add pharmacies and manage any existing pharmacies in eRx.

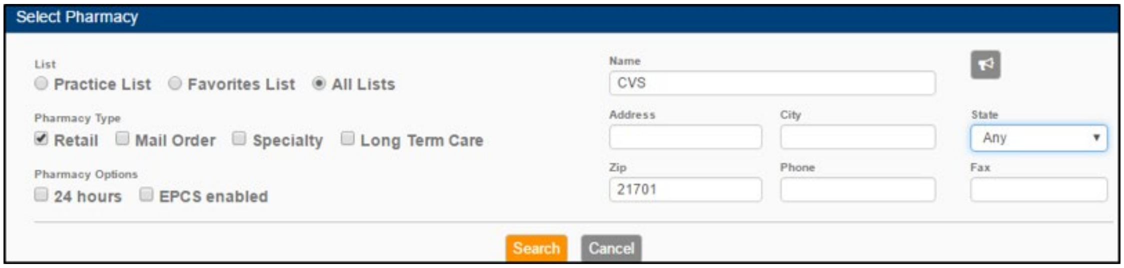
To manage pharmacies:

1. Open eRx to the **axiUm eRx** window and scroll to the **Patient** widget.



Note: *If this is a new patient, a notification displays at the top of the patient record.*

2. Click the **Pharmacy Search** ( ) icon to open the **Select Pharmacy** widget.



3. To add a pharmacy to the patient record:

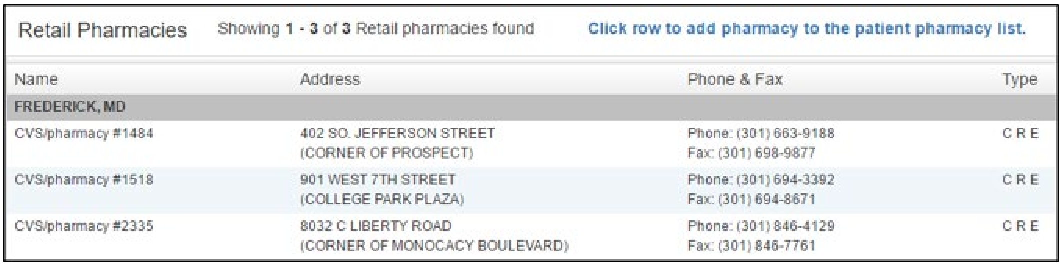
   a. Complete the fields as necessary and click **Search**.

   Tip: *Only complete the fields which are applicable to your search. In some cases, you only need to complete the* ***Zip*** *field with the applicable zip code.*

Field	Description
List	Select a radio button to indicate which list(s) to search for pharmacies in: • **Favorite List**: This contains pharmacies the individual user selected to be in their favorites list. • **Practice List**: This contains pharmacies located within the first three digits of the practice's ZIP code. • **All lists**: This contains all available pharmacies.
Pharmacy Type	Select the check box(es) as necessary: • **Retail** • **Mail Order** • **Specialty** • **Long Term Care**
Pharmacy Options	Select the check box(es) as necessary: • **24 hours**: Select if you want to include pharmacies that are open 24 hours. • **EPCS enabled**: Select if you want to include pharmacies that are EPCS enabled.
Name	Enter the pharmacy name.

City / State / Address / Zip	Enter any pharmacy address details. ***Tip***: *To search quickly, enter only the* ***Zip*** *code.*
Phone / Fax	Enter any pharmacy contact details.

The search results that meet your search criteria display.



Retail Pharmacies — Showing **1 - 3** of **3** Retail pharmacies found — **Click row to add pharmacy to the patient pharmacy list.**

Name	Address	Phone & Fax	Type
FREDERICK, MD			
CVS/pharmacy #1484	402 SO. JEFFERSON STREET (CORNER OF PROSPECT)	Phone: (301) 663-9188 Fax: (301) 698-9877	C R E
CVS/pharmacy #1518	901 WEST 7TH STREET (COLLEGE PARK PLAZA)	Phone: (301) 694-3392 Fax: (301) 694-8671	C R E
CVS/pharmacy #2335	8032 C LIBERTY ROAD (CORNER OF MONOCACY BOULEVARD)	Phone: (301) 846-4129 Fax: (301) 846-7761	C R E

b. Review the listed pharmacies and their types:

Tip: *If you hover over the type, it displays additional details.*

- **C**: Indicates the pharmacy accepts controlled substance prescriptions electronically.
- **E**: Indicates the pharmacy accepts electronic prescriptions.
- **R**: Indicates the pharmacy is a retail pharmacy.

c. Click a pharmacy row to add the pharmacy to the patient record.

The pharmacy displays in the **Patient** widget in the **Pharmacy** drop-down field.

4. To perform another task, complete one of the following:

Task	Procedure
View Pharmacies	Next to a selected pharmacy, click the **View** ( ) icon to review the contact and location information.
Remove Pharmacies from Patients	a. If necessary, select the correct pharmacy from the **Pharmacy** drop-down list. b. Click the **Remove Patient Pharmacy** ( ) icon.

Manage Diagnoses / Problems

Within eRx, you can enter diagnoses/problems for a patient. This is beneficial because the system can check for drug-diagnoses interactions.

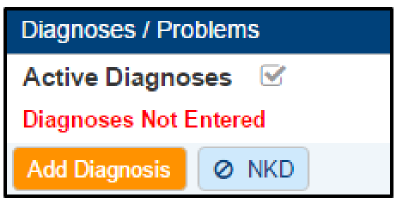
In addition, by populating this information, you can select a diagnosis from the Prescribe Medication widget to place on prescriptions. For more information, see Manage Prescriptions.

To manage patient diagnoses:

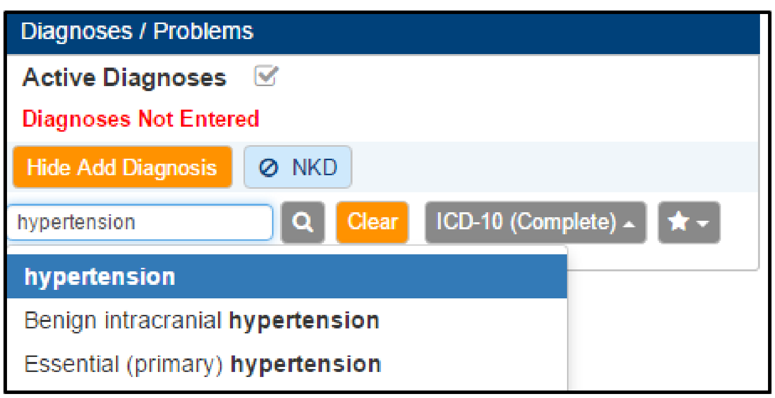
1. Open eRx to the **axiUm eRx** window and scroll to the **Diagnoses / Problems** widget.
2. Review the patient's listed diagnoses.

   Note: *If no diagnoses are listed,* ***Diagnoses Not Entered*** *displays.*

3. To add a diagnosis, complete the following:
   a. Click **Add Diagnosis**.

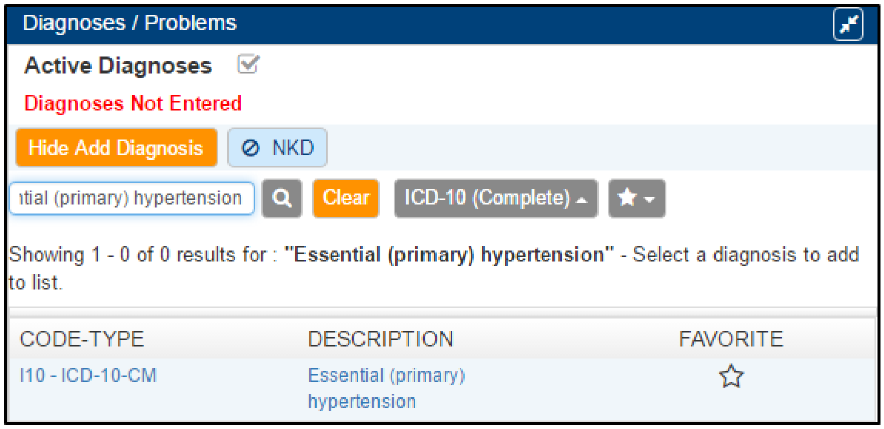


   b. Complete one of the following.
      - To indicate the patient has no diagnoses, click the **NKD** button.
      - To search for the diagnosis:
        i. Enter part of the specific diagnosis code or description of the diagnosis in the search field.

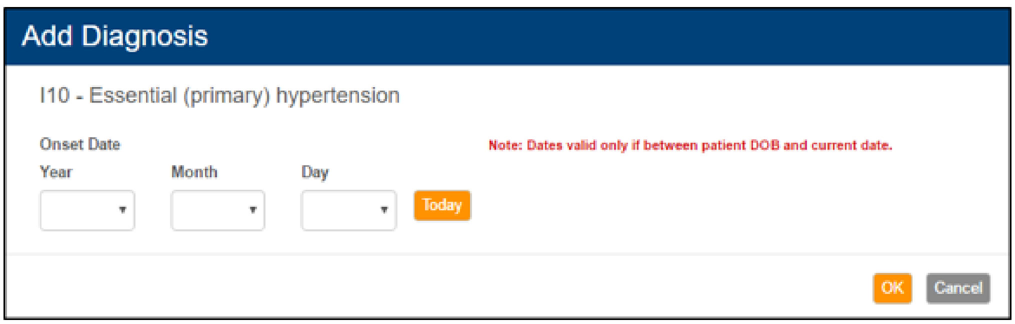


        ii. Select the diagnosis from the list or click the **Search** ( ) icon to display all results, then select the correct diagnosis.

iii. (Optional) Click the **Favorite** (☆) icon to add the diagnosis to your favorites list.

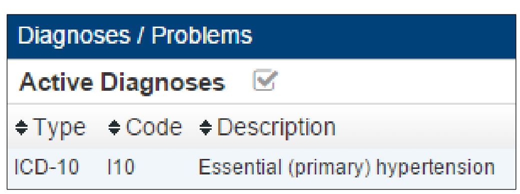


c. Under **Add Diagnosis**, complete the **Onset Date** fields as necessary and click **OK**.



The diagnosis displays in the **Diagnoses/Problems** widget.

4. To perform another task, complete one of the following:

<table>
<tr><th>Task</th><th>Procedure</th></tr>
<tr><td>Review Diagnoses</td><td>At the top of the diagnoses list next to Active Diagnoses, select the check box.


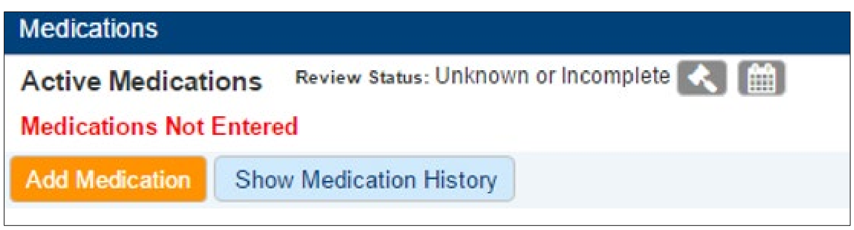
</td></tr>
</table>

Inactivate Diagnoses	Next to a listed diagnosis, click the **Make Inactive** () icon. The diagnosis now displays under **Inactive Diagnoses** list and the **Date** column lists the date it was inactivated. ***Tip**: To view the **Inactive Diagnoses** list, click the **Show Inactive Diagnoses** button.*
Reactivate Diagnoses	A deactivated diagnosis can be reactivated. Under **Inactive Diagnoses**, next to a listed diagnosis, click the **Make Active** () icon. The diagnosis now displays under **Active Diagnoses**.
Resolve Diagnoses	Next to a listed diagnosis, click the **Resolve** () icon.
Delete Diagnoses	Next to a listed diagnosis, click the **Delete** () icon. The diagnosis is now listed in the **Inactive Diagnoses** section and next to the date, reads **Deleted**.

Manage Medications

Within eRx, you can enter medications for a patient. This allows you to list their active medications, and whether they were prescribed by you or another provider.

1. Open eRx to the **axiUm eRx** window and scroll to the **Medications** widget.



2. Review the patient's listed medications.

   ***Note**: If no medications are listed, **Medications Not Entered** displays.*

3. To add an active medication, complete the following:

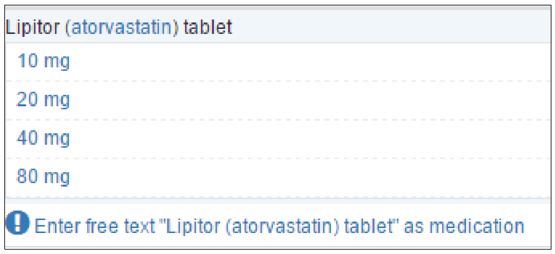
   a. Click **Add Medication**.

   b. Complete one of the following.

      - To select from the **Favorites List**, click the **Favorite** ( ) icon and select from the drop-down list.
      - To search for the medication:

        i. Enter part of the drug name in the search field.

        ii. Select the drug from the listed results and select the strength.



   c. Under **Add Medication**, complete the **Patient Directions**, **Duration**, **Quantity**, **Refills**, **Start Date**, **Last Written Date**, **Stop Date**, **Med Hx Source**, and **Internal Comments** fields as necessary and click **Add**.

   Note*: These fields are not required.*

   The active medication displays in the **Medications** widget.

4. To perform another task, complete one of the following:

<table>
<tr><th>Task</th><th>Procedure</th></tr>
<tr><td>Quick Add Active Medications</td><td>Note: The Quick Add feature must be enabled within Location settings by an administrator.

If enabled, you can use Quick Add to add medications to the active medication list without entering medication details.

a. Click the Add Medication button and search for the medication.

b. From the listed results, click the ( ) icon for the medication.

The medication displays in the Active Medications list.</td></tr>
</table>

Stop Medications

You can stop active medications. This removes them from the active medications list.

a. Next to a listed active medication, click the **Stop** ( ) icon.

The medication is removed from the **Active Medications** list. The **Date Stopped** defaults to the current date and the reason defaults to **Completion of Therapy**.

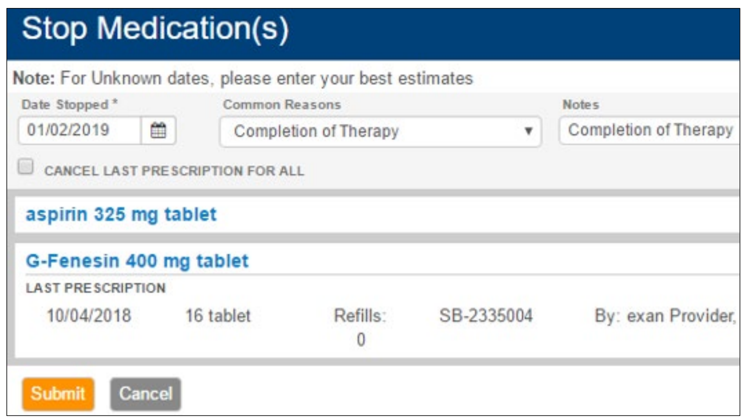
b. (Optional) Modify the **Date Stopped** and **Common Reasons**, fields.

Stop Multiple Medications

a. Next to each listed active medication you want to make inactive, select the check box.

b. At the top of the list, click the **Stop Medication(s)** ( ) icon.

Under **Stop Medication(s)**, the list of the medications to be stopped displays.



c. (Optional) Modify the **Date Stopped**, **Common Reasons**, and **Notes** fields as necessary.

d. (Optional) To cancel any active meds that were previously been prescribed, select the **Cancel Last Prescription for All** check box.

e. Click **Submit**.

Renew Medications

This allows you to create a prescription that has been previously added into the system.

Next to a listed active medication, click the ( ) icon.

***Note**: Once you renew, the prescription displays in the **Prescription Management** widget.*

Restart Medications

This allows you to restart a stopped prescription.

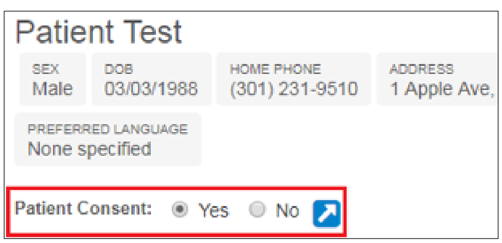
Next to a listed active medication, click the ( ) icon.

Prescribe Active Medications	This allows you change the details for a medication (sig, duration, quantity, refills, pharmacy, etc.) and then prescribe. Next to a listed active medication, click the () icon.
View Inactive Medications	Click the **Show Inactive Medications** button. The list of all **Inactive Medications** for the patient displays.
Delete Medications	a. Next to an active medication, click the **Delete** () icon. b. When prompted, confirm the deletion. ***Important****: do not delete unless the medication was added in error onto the patient's medication list.*

Obtain Medication History

You can use eRx to obtain a patient's medication history for up to 1 year prior from SureScripts.

Important*: SureScripts receives medication information from Pharmacy Fill data and Payer Claims information. You must first indicate in the* ***Patient*** *widget >* ***Patient Consent*** *field that the patient has given consent to view their medication history.*



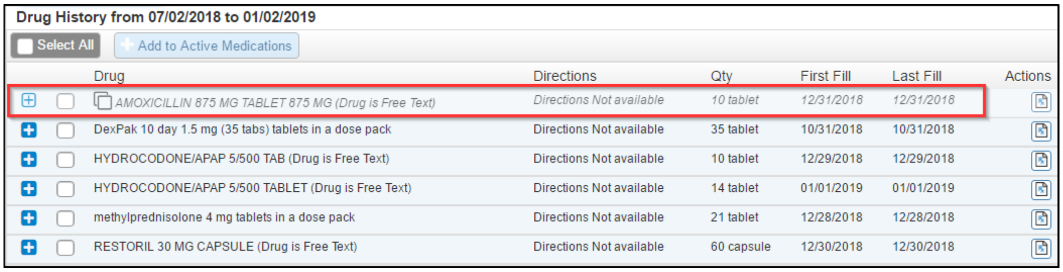
To obtain a patient's medication history:

1. Click **Show Medication History**.

   The patient medication information displays according to their primary insurance company's records. If the patient has multiple insurance companies, this information is listed in the **Pharmacy Benefit** drop-down list.

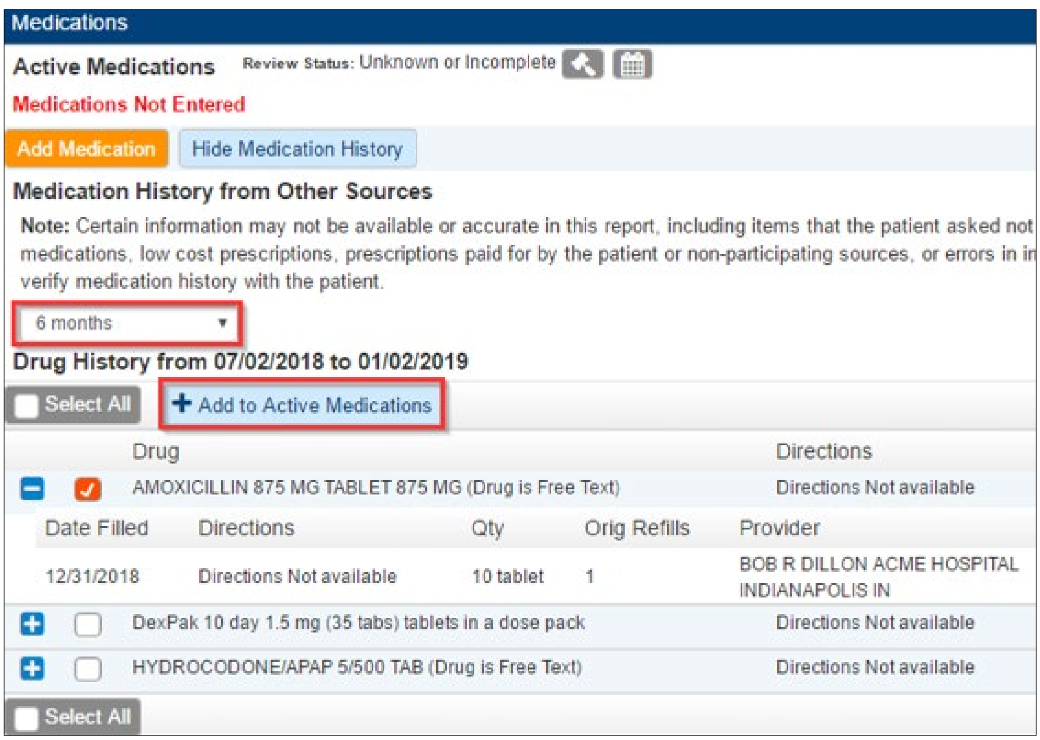
2. From the drop-down list, select a time period to filter the results.

   Note*: If a medication is also an active medication, it displays in gray italics. Hovering over the medication indicates to users that it is already marked as active.*



3. Next to a listed drug, click the ( ) icon to view additional details, including sig, prescribing provider, the filling pharmacy, quantity, and refills.

   Tip*: To add a drug to the* ***Active Medications*** *list, select the check box and click the* ***+ Add to Active Medications*** *button.*



Manage Prescriptions

Within eRx, you can create and manage prescriptions for a patient as necessary.

A quality prescription includes the following:

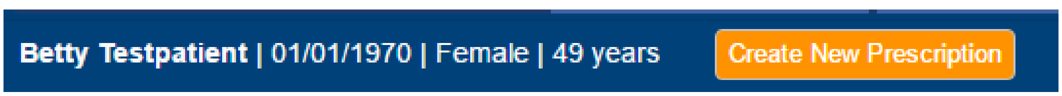
- Full patient name, address, and date of birth.
- Medication name, directions (sig), and quantity.
- Problem and allergies (if applicable).
- Distinguishes between “substitution permissible” and “dispense as written”.

Add Prescriptions Manually

You can add a prescription manually from eRx. Depending on your workflow, this may include sending the prescription to pharmacy or saving the prescription as pending to be sent at a later date. For more information about sending a pending prescription, see Manage Pending Prescriptions.

To add prescriptions manually:

1. Within the context bar, click the **Create New Prescription** button.



2. In the search field, enter part of the drug name, then select the correct drug from the drop-down list or click **Search**.

   Tip: *Try to select drugs rather than enter as free text. Selected drugs generate formulary and clinical warning checks. This reduces the number of calls from the pharmacy about formulary and clinical warnings after a prescription has been sent.*

   Note: *Free text drugs display an (*  *) icon to indicate they do not generate warning checks.*

3. Click the necessary strength.

4. From the **Prescribe Medication** widget, complete the required fields as necessary and click **Review**.

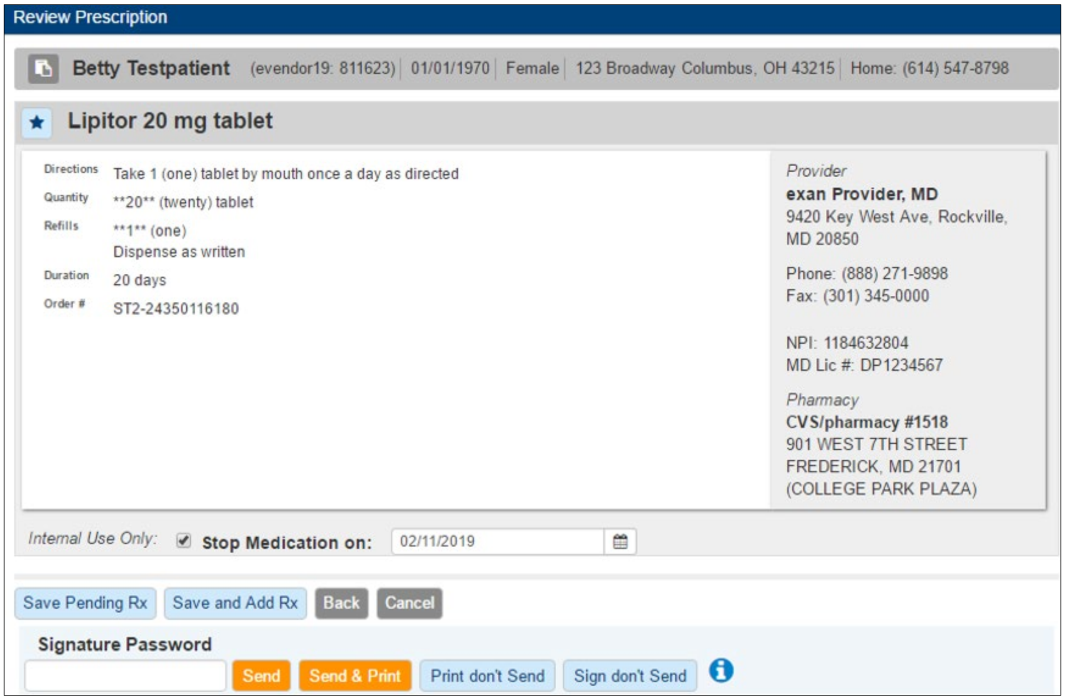
   Note: *Required fields are marked with a red asterisk.*

Field	Description
Provider	Confirm the selected provider is correct, and if necessary, select another entry from the drop-down list.

Pharmacy	Confirm the selected pharmacy is correct, and if necessary, select another entry from the drop-down list.
Drug	Confirm the selected drug is correct, and if necessary, select another strength from the drop-down list.
Sig	Select an option from the drop-down list. ***Note**: The **Other** field is optional.* ***Tip**: Use the **Sig** field for basic directions to avoid placing clinical information in the **Directions to Patient** field. If necessary, enter individualized directions in the **Directions to Patient** field.*
Duration	Select an entry. ***Note**: If a duration is selected, the **Quantity** field auto-populates.* ***Important**: If a duration is selected, the medication will be automatically removed from the patient's active medications list once the duration has passed.*
Dose Calculator	(Optional) Enter the patient weight in kilograms at the far right of the screen.
Quantity / Refills	Select a numerical entry and number of prescription refills. ***Note**: The **Refills** field defaults to **None**.*
Primary Dx / Secondary Dx	Enter a primary diagnosis and/or secondary diagnosis. ***Note**: These fields only display if the patient has problems listed in their **Problem History**.*
Directions to Pharmacist	Enter any directions for the pharmacist. ***Note**: The directions default to **Substitution permitted**.*
Directions to Patient	Enter any individualized directions for the patient. ***Note**: The free text box allows you to create a tapered prescription that displays under the sig line. There is no character limit. However, if you exceed 140 characters, the prescription cannot be transmitted electronically and is dropped to fax.* **Example**: 2 tablets on the 2nd day, 1 tablet on the 3rd day.
Comments	Enter any additional comments that are for office use only.

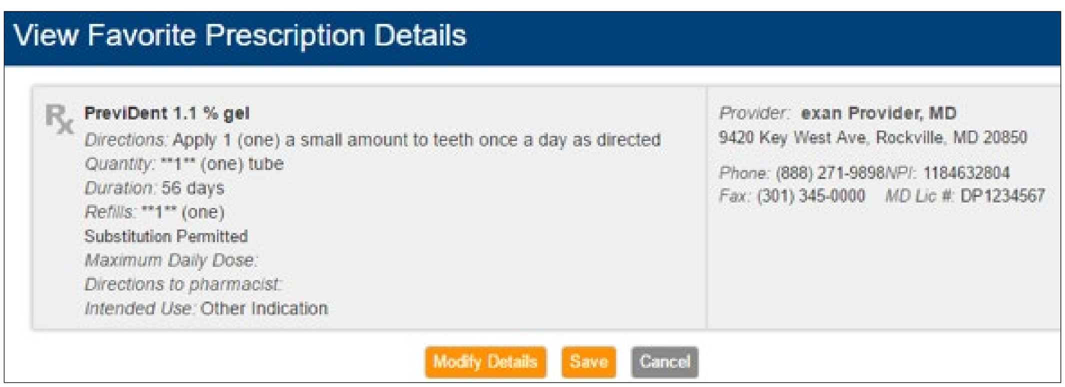
5. Under **Review Prescription**, review all parts of the prescription.

   Important: *Review carefully to ensure the prescription is accurate for your patient.*



6. (Optional) To make the prescription a favorite:

   a. Click the **Favorite** () icon to open the **View Favorite Prescription Details** window.



   b. If necessary, click **Modify Details** and make modifications.

   c. When ready, click **Save** to add the favorite to your personal favorite list and return to the **Review Prescription** screen.

7. (Optional) If you want the patient to receive a copy of the prescription, confirm their mobile phone number is entered at the bottom of the **Review Prescription** section.

8. (Optional) Click **Save Pending Rx** to add the prescription to the **Prescription Management** section on the **Patient Info Screen** for review and signoff or click **Save and Add Rx** to create a pending prescription and return to the **Medication** widget.

   Note*: You can also click* ***Back*** *to edit the Sig details in the* ***Prescribe Medication*** *widget or click* ***Cancel*** *to cancel the prescription.*

9. If you are a provider, enter your **signature password**.

   Note*: If you are an active EPCS prescriber, the* ***Two Factor Authentication*** *(TFA) section displays.*

10. If the **Two Factor Authentication** section displays, complete the following:

    a. Select the check box next to any controlled substances you want to send.

    b. Enter your **Signing Passphrase**, select your EPCS **Token Device**, and enter the **Token PIN**.

    c. Click the **Sign and Send** button.

11. If the **Two Factor Authentication** section does not display, complete one of the following:

    - To transmit the prescription to the pharmacy electronically, click **Send**.
    - To transmit the prescription to the pharmacy electronically and print a watermarked copy, click **Send & Print**.
    - To print the prescription without sending it to the pharmacy, click **Print don't Send**.

      Tip*: Use this option if the patient is unsure which pharmacy they want to use.*

      Important*: Some states require this for controlled substance prescriptions.*

    - To sign the medication and add to the patient's active medication list, but not send the prescription to the pharmacy, click **Sign don't Send**.

      Tip*: Use this option if the patient was given a sample.*

    The patient will receive a text message providing access to their personal medication record where they can see any recent prescriptions, updates their active medications, view coupons and drug pricing information, as well as securely store health data.

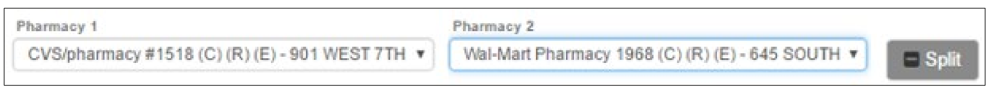
Split Prescriptions

If necessary, you can split a prescription between two pharmacies, when prescribing. This sends a prescription with the same sig to two different pharmacies.

1. If necessary, from the **Pharmacy** drop-down list, select the patient's default pharmacy.
2. Next to the pharmacy, click the **+ Split** button.

An additional **Pharmacy** drop-down list displays to the right.

3. From the additional **Pharmacy** drop-down list, select a secondary pharmacy.



4. For each pharmacy, complete the **Days Supply**, **Quantity**, and **Refills** fields as necessary.

   ***Note**: You cannot send two prescriptions if you do not complete the fields for both pharmacies.*

Mark Existing Prescriptions as Favorites

You can mark existing prescriptions as favorites from the **Prescription Management** widget. This allows you to prescribe your practice's common prescriptions easily.

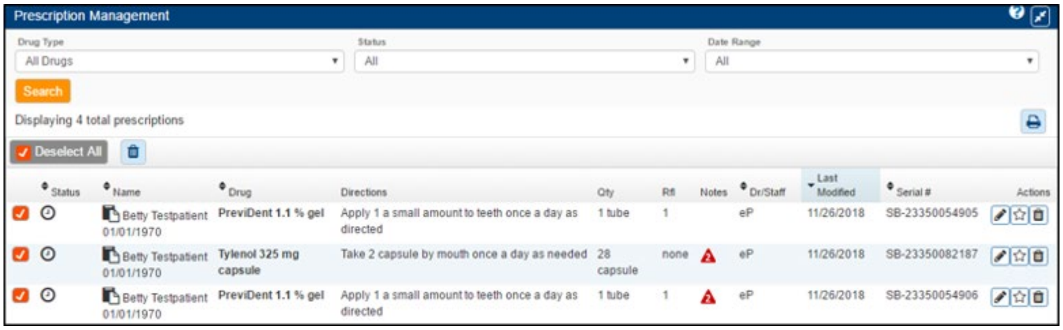
***Note**: You can also mark a prescription as a favorite when adding a prescription or create favorites when working in the **Manage Favorites** widget. For more information, see <u>Add Prescriptions Manually</u> or <u>Manage Favorite Prescriptions</u>.*

To mark a prescription as a favorite:

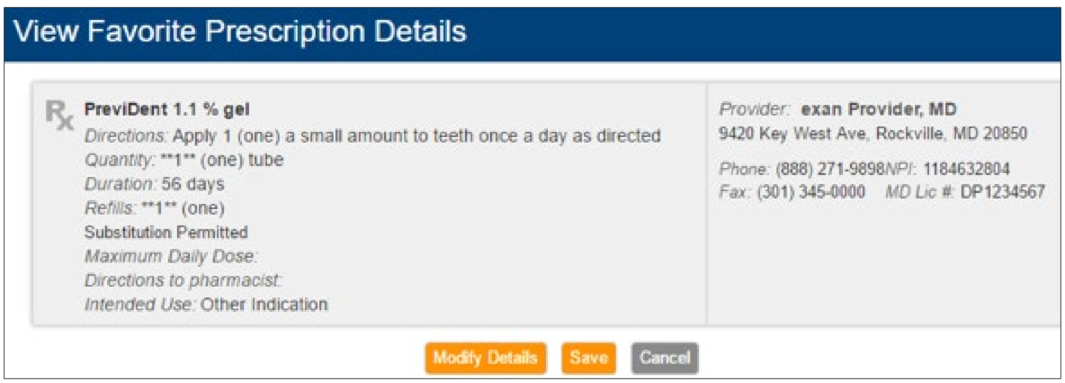
1. Open eRx to the **axiUm eRx** window and scroll to the **Prescription Management** widget.
2. Review the patient's listed prescriptions.

3. Next to a listed prescription, click the **Favorite** () icon for a prescription.

   ***Note**: If it displays in yellow, the prescription is already a favorite.*



4. From the **View Favorite Prescription Details** window, review the details.



5. If necessary, click **Modify Details** and make modifications.
6. When ready, click **Save** to add the favorite to your personal favorite list.

Prescribe using Favorite Prescriptions

You can quickly add prescriptions using several favorites lists:

- **Org Favorites** (your practice list)
- **My Favorites** (individual favorites list)
- **Recent**
- Location list (if applicable)

You can search for favorites by typing into the search box. Recently used favorites display in the right column.

***Note**: How these lists display depends on the practice location settings.*

To prescribe using favorite prescriptions:

1. To prescribe a favorite prescription, click the **Favorites**  drop-down located within the context bar and select the correct favorite prescription to use from the available list(s).

   Tip: *You may also use the search field to narrow your results.*

Once you select a favorite, a pending prescription is created and can be signed within the **Prescription Management** widget. For more information, see Manage Pending Prescriptions.

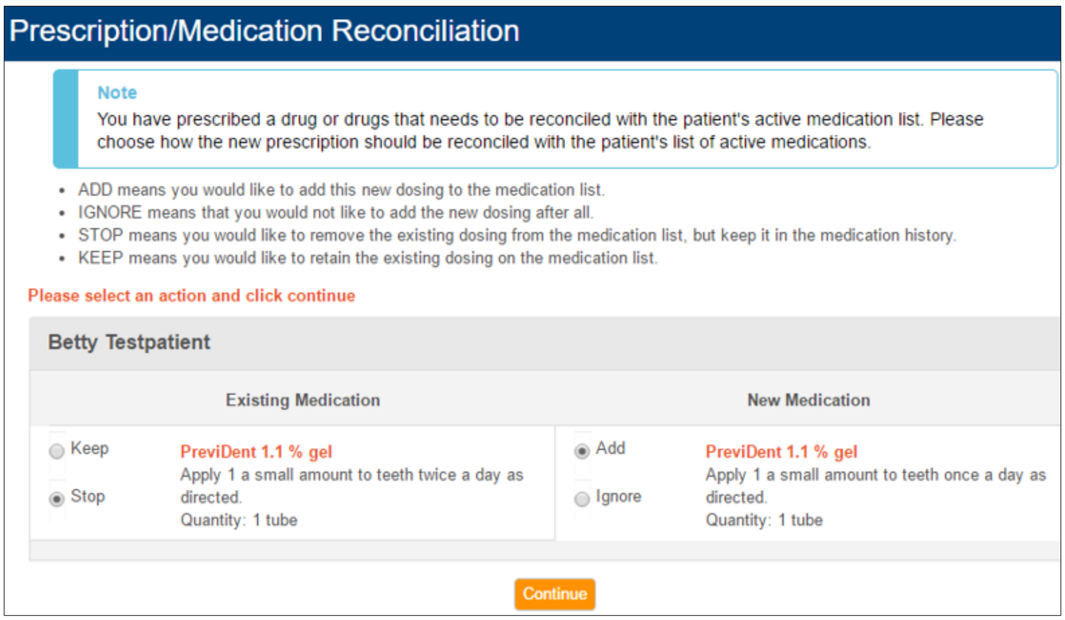
Tip: *When prescribing using a favorite prescription, ensure the directions are accurate. Pre-populated directions may not be appropriate for your patient.*

Reconcile Prescription/Medication

When you prescribe in eRx, the prescription is added to the patient's **Medications** list of when the prescription is sent to the pharmacy.

However, if the same medication is already in the **Active Medication** list, the **Prescription/Medication Reconciliation** screen displays.

From here, you can determine what should happen to the already listed medication and the newer prescribed medication.



For existing medication, you can choose to keep or stop the medication. For new medication, you can choose to add or ignore the medication.

To reconcile the medications:

1. Review the listed medications.
2. Under **Existing Medication**, select one of the radio buttons:
   - **Keep**: If selected, the existing medication remains on the **Active Medication** list.
   - **Stop**: If selected, the existing medication is removed from **Active Medication** list.

     Note*: The existing medication remains in the medication history.*
3. Under **New Medication**, select one of the radio buttons:
   - **Add**: If selected, the new medication is added to the **Active Medication** list.
   - **Ignore**: If selected, the new medication is not added to the **Active Medication** list.
4. Click **Continue**.

Manage Favorite Prescriptions

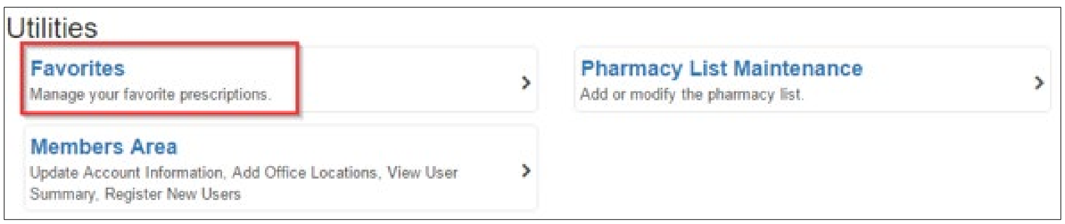
Favorite prescriptions allow you to create prescriptions for patients quickly.

The **Utilities** area of eRx allows you to view, create, and maintain your favorites lists as necessary.

***Note**: You can also make existing prescriptions favorites. For more information, see Mark Existing Prescriptions as Favorites.*

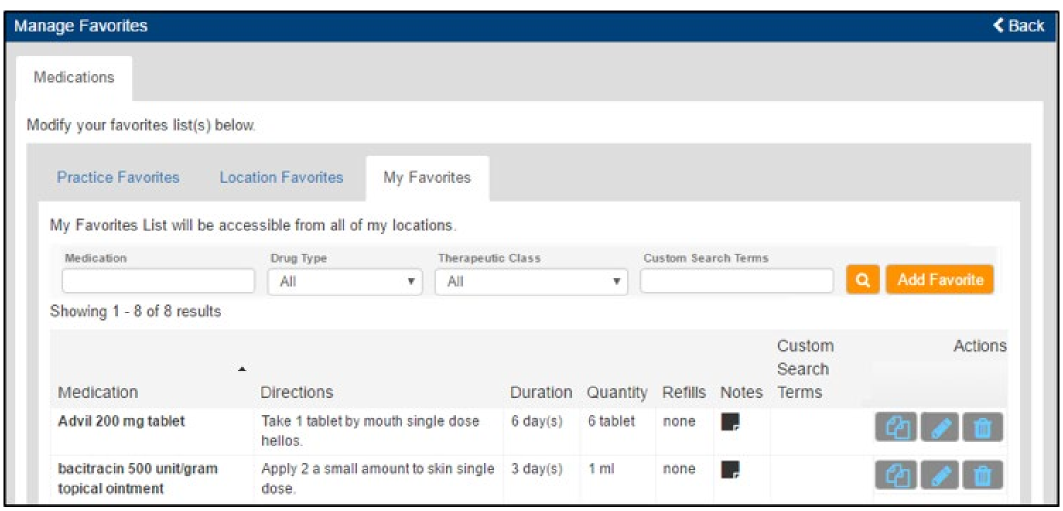
To manage favorite prescriptions:

1. From the menu (☰) icon at the top left of the screen, select **Utilities**.
2. Under **Utilities**, select **Favorites**.



3. In the **Manage Favorites** widget, review the lists of currently favored medications.

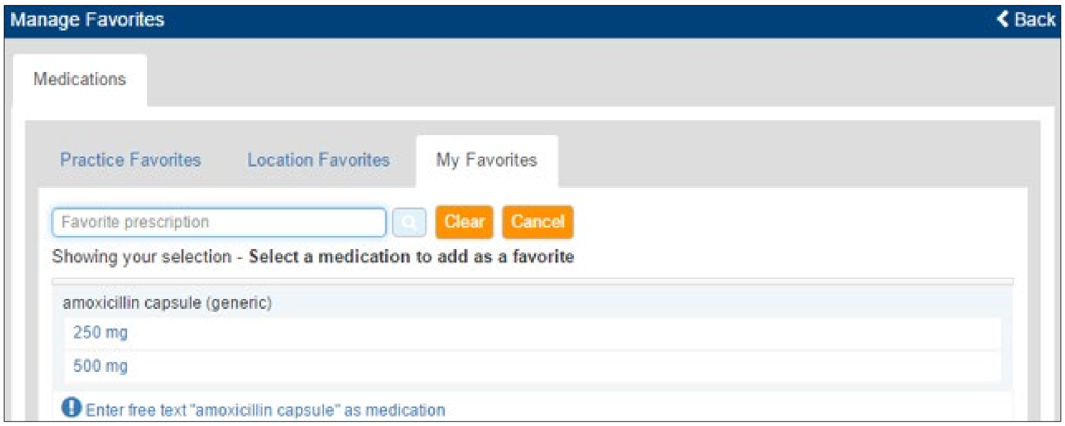
   __Note__: You can manage personal favorites under the __My Favorites__ list. Depending on location settings and account permissions, you may be able to manage the __Practice Favorites__ and __Location Favorites__ lists.



4. To add a favorite, complete the following:

    a. Click the **Add Favorite** button.

    b. In the search field, enter the medication name and click the appropriate strength.



    c. Enter the details and click **Save**.

5. To perform another task, complete one of the following:

Task	Procedure
Duplicate Favorites	a. Click **My Favorites**. b. Next to a listed favorite, click the **Duplicate** ( ) icon. c. Modify the fields as necessary. **Example**: Drug strength.
Modify Favorites	a. Next to a listed favorite, click the **Duplicate** ( ) icon. b. Modify the fields as necessary.
Delete Favorites	Next to a listed diagnosis, click the **Delete** ( ) icon.

Manage Pending Prescriptions

If a prescription was added previously, but was not sent to a pharmacy, it remains pending in the **Prescription Management** widget. You can send it at a later date.

This may include regular prescriptions and prescriptions for controlled substances.

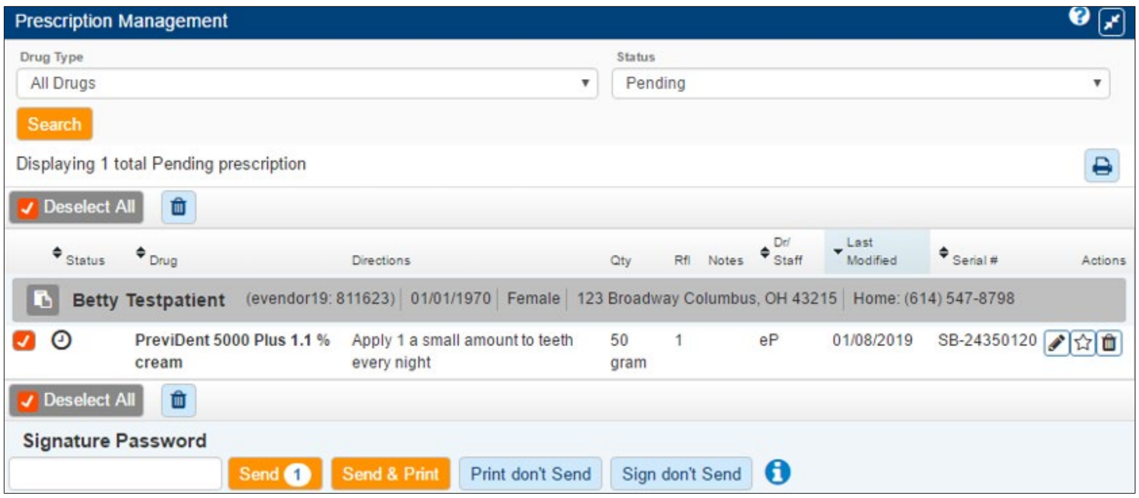
Send Prescriptions

1. Open eRx to the **axiUm eRx** window and scroll to the **Prescription Management** widget.

1. Review the patient's listed prescriptions.

   Important: *Review carefully to ensure the prescription is accurate for your patient.*

2. Next to the listed prescription(s), select the check box(es).



3. If you are a provider, enter your **Signature Password**.

4. To send the prescription, complete one of the following:

   - To transmit the prescription to the pharmacy electronically, click **Send**.

   - To transmit the prescription to the pharmacy electronically and print a watermarked copy, click **Send & Print**.

   - To print the prescription without sending it to the pharmacy, click **Print don't Send**.

     Tip: *Use this option if the patient is unsure which pharmacy they want to use.*

     Important: *Some states require this for controlled substance prescriptions.*

   - To sign the medication and add to the patient's active medication list, but not send the prescription to the pharmacy, click **Sign don't Send**.

     Tip: *Use this option if the patient was given a sample.*

Send Controlled Substance Prescriptions

Important: *In order to send controlled substances electronically, a provider must have successfully completed the EPCS onboarding process and be activated by an administrator through Logical Access Control (LAC).*

Active EPCS prescribers can sign and send controlled substance prescriptions electronically within eRx, from within the Prescription Report or the **Prescription Management** widget.

Note: *You can also send a controlled substance prescription from the* ***Review*** *screen when adding a prescription manually. For more information, see Add Prescriptions Manually.*

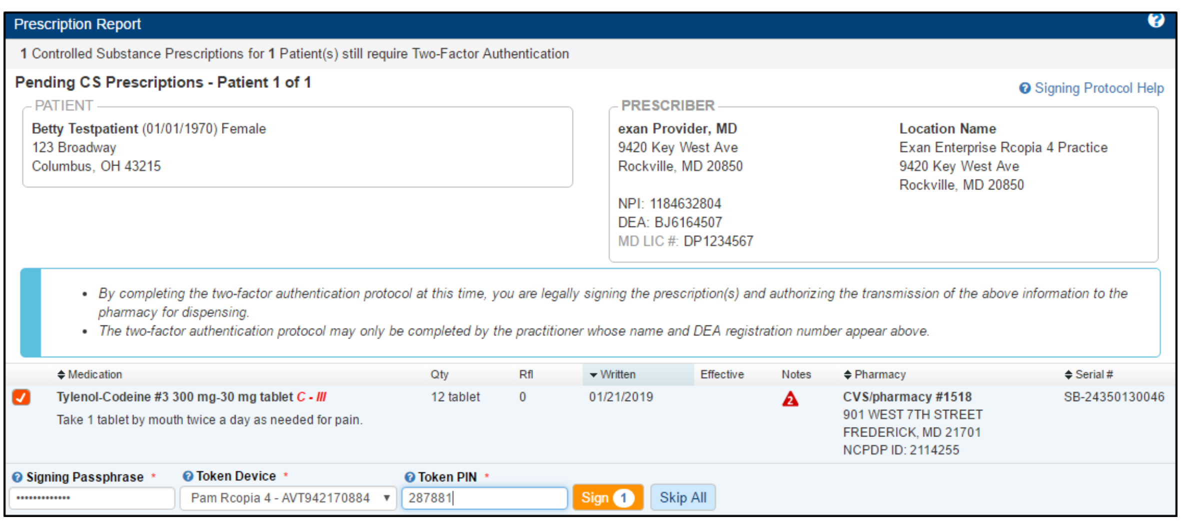
To send a prescribed controlled substance:

1. Open eRx to the **axiUm eRx** window and scroll to the **Prescription Management** widget or click **Prescription Report** to open the **Prescription Report** widget.
2. Next to each prescription you want to send, select the check box, enter your signature password. and click **Send**.

   Important: *Review carefully to ensure the prescription is accurate for your patient.*

   Note: *A notification displays the number of prescriptions you are sending.*

   At the top of the screen, the number of legend prescriptions sent and pending controlled substance prescriptions that must still be completed display.



3. Next to each medication name, select the check box and enter your two-factor authentication to complete the prescription.

4. Complete one of the following:
    - To transmit the prescription to the pharmacy electronically, click **Sign**.
    - To process these at a later time, click **Skip All**.

Manage Alerts

There are two main alert types used in eRx during the prescribing process.

- **Clinical Alerts**: These display to ensure you have all required information about the medication selected. There are several different types of clinical alerts.
- **Formulary Alerts**: These display when eRx searches for patient eligibility and you try to prescribe a medication that is not covered or has higher co-pay.

Manage Clinical Alerts

eRx uses a variety of clinical alerts to ensure that you have all pertinent information during the prescribing process:

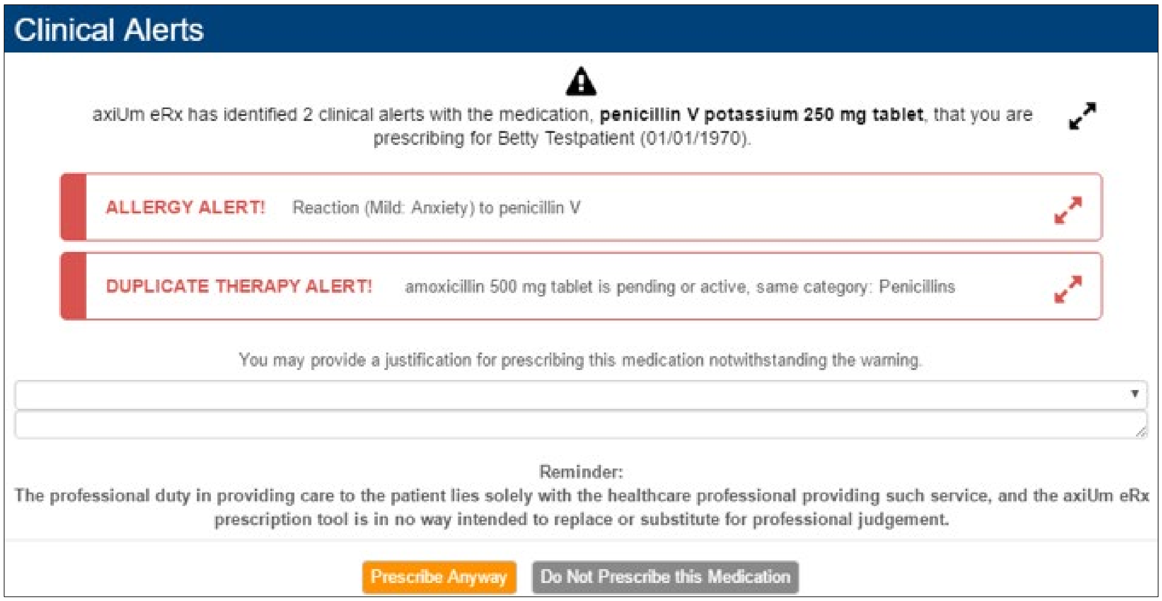
- **Drug-Drug Interactions**: When prescribing, eRx checks the active medication list for drug-drug interactions. Any alerts display after you have chosen a drug and corresponding strength.

  ***Note**: These alerts have a reference section that can be accessed by clicking the arrows to the right of the message.*
- **Drug-Allergy Interactions**: When prescribing, eRx alerts you if the medication is associated with a drug on the list of allergies and adverse reactions. The alerts display after you search for the drug and select the strength.
- **Drug-Diagnoses Interactions**: When prescribing, eRx alerts you if the medication may interact with a diagnosis or problem documented for your patient. The alerts display after you search for the drug and select the strength.
- **Dose Check**: This alerts the user if they have prescribed a medication amount that is above or below the maximum or daily dose for that medication.
- **Duplicate Therapy**: This alerts the user if they have prescribed two drugs in the same therapeutic class.
- **Geriatric Precautions**: These are based on the Beers list, which indicates that certain medications may not be appropriate for the elderly patients.
- **Pediatric Precautions**: These alerts pertain to medications prescribed for the pediatric patients. In some cases, certain drugs are not recommended for these patients.

To manage alerts:

If you select a drug that will prompt a clinical alert, eRx displays the alert on the screen.

Note*: All clinical alerts display in red.*



1. Complete one of the following:
   - To cancel the prescription, click **Do Not Prescribe this Medication**.
   - To continue prescribing, click **Prescribe Anyway**.
2. (Optional) If you clicked **Prescribe Anyway**, you can provide a justification for prescribing the medication despite the warning.

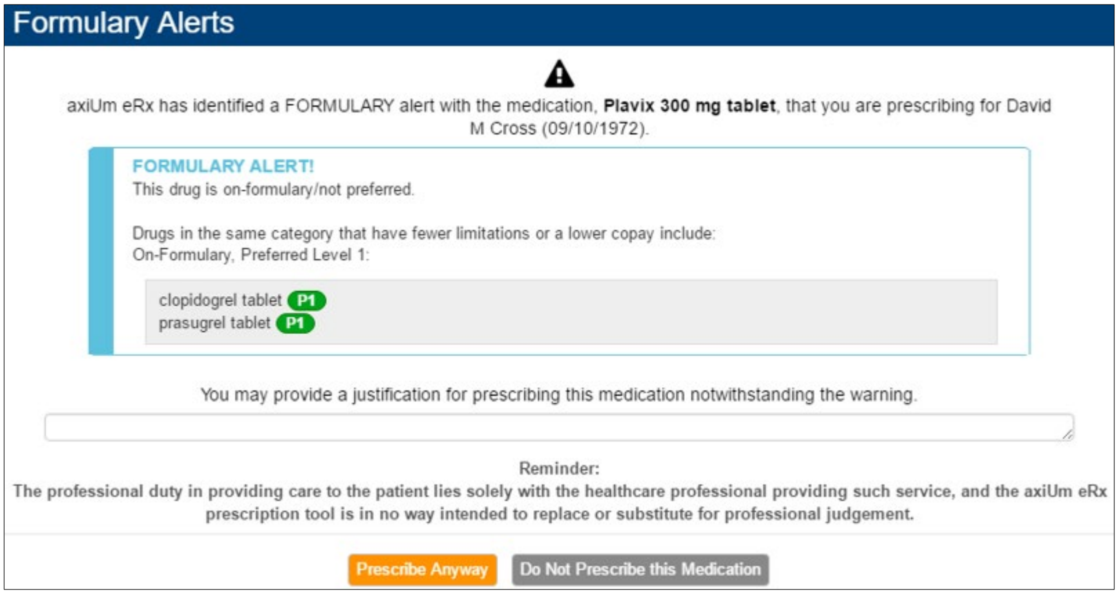
Manage Formulary Alerts

Formulary information is obtained from SureScripts.

1. When you open eRx, it automatically searches for patient eligibility using their first and last name, ZIP code, and DOB.

   Important*: SureScripts provides formulary information from health plans, Pharmacy Benefit Managers and Payers such as Blue Cross, Anthem, MAMSI, etc. SureScripts may not provide eligibility for all government-funded formularies such as Medicaid or some small regional payers.*

2. If you try to prescribe a medication that is not covered or has higher co-pay, a formulary alert displays.



3. Complete one of the following:
   - To cancel the prescription, click **Do Not Prescribe this Medication**.
   - To continue prescribing, click **Prescribe Anyway**.
4. (Optional) If you clicked **Prescribe Anyway**, you can provide a justification for prescribing the medication despite the warning.
5. If you click **Do Not Prescribe this Medication**, you can select from a list of alternatives and prescribe a medication that may have a lower co-pay.

Manage Reports

View the Prescription Report

The **Prescription Report** widget allows users to manage all prescription activity within one convenient location.

If necessary, you can complete pending prescriptions from the Prescription Report.

1. At the top of the **axiUm eRx** window, click **Prescription Report**.

2. Select the correct provider or **All Providers** from the drop-down list.

3. Select **Current (patient)**.
4. Select the appropriate **Status**:
   - **All**: If selected, all pending and completed prescriptions display.
   - **Pending**: If selected, only those prescriptions with no action taken display.
   - **Completed**: If selected, all prescriptions that are signed and sent or signed and printed display.
     - Select the correct date range from the date filter that displays.
   - **Undeliverable**: If selected, prescriptions that have not been delivered to the pharmacy display.
5. Click the **Display Report** icon.

   The report displays all prescriptions that match the criteria, including the prescription status and sig details.
6. Review the report columns as necessary.
   - **Status** column: Indicates whether a prescription was successfully sent to the prescription's final destination.

     ***Tip**: Hover your mouse over an icon to display the tooltip for the icon.*
   - **Pre-validation messages** column: Indicates whether a prescription generated any pre-validation messages and lists the message(s).
     - "Patient Address Incomplete. Unsendable"

       The patient is missing Address Line 1 which must be populated in order to transmit a controlled substance electronically.
     - "Oversize notes, Fax/Print Only" -

       Either patient directions or directions to pharmacist have exceeded the allowed character limit.
   - **Action** column: Indicates the prescription status and displays action icons accordingly.

     ***Tip**: Hover your mouse over an icon to display a tooltip for each action.*
     - **All prescriptions** status:
       - **Favor**: Adds the prescription to your Favorites List.
     - **Pending prescriptions** status:
       - **Modify**: Allows you to modify the prescription before completing it.
       - **Delete**: Allows you to delete any instance of the prescription.

- **Completed prescriptions** status:
    - **Renew**: Renews a completed prescription.
    - **Resend**: Resends a completed prescription.
    - **Print/Reprint**: Prints/reprints a completed prescription.
    - **Cancel**: Cancels the prescription and sends a notice to the pharmacy.

7. To complete prescriptions, complete the following:
    a. Next to each prescription you want to complete, select the check box.
    b. Enter your **Signature Password**.
    c. Click the necessary action button.

    ***Note**: The necessary action button depends on the healthcare provider.*

View Medication Reports

After you have selected a patient, you can view two medication reports within the **Patient Information** widget.

The **Provider Clinical Report** lists the patient's active and inactive medications, as well as the patient's allergy, diagnoses, pharmacy information, and provider information.

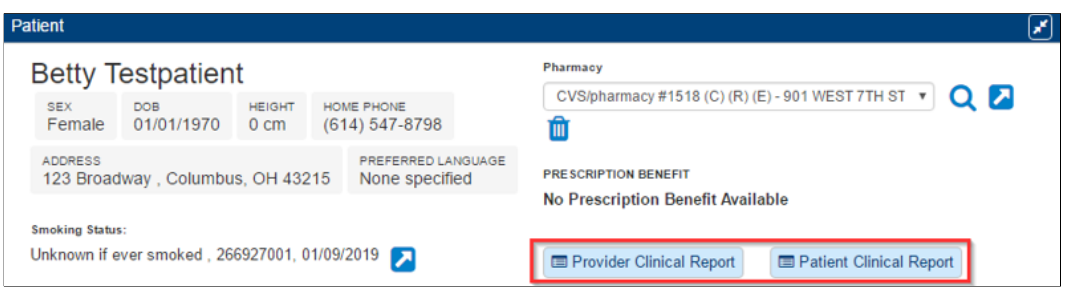
***Note**: This report is useful when transferring patient care to another provider.*

The **Patient Clinical Report** is a wallet-sized version of a patient's current medication, allergy and problem list.

***Note**: This is an ideal way for patients to track the medications they are taking.*

To view the medication reports:

1. Open eRx to the **axiUm eRx** window and scroll to the **Patient** widget.
2. Click the **Provider Clinical Report** or **Patient Clinical Report** button in the **Patient** widget.



3. (Optional) Print the report as necessary.

    ***Note**: If pop-up blockers enabled, the print window cannot display. You must turn this feature off to view and print from the browser.*

4 Perform Other eRx Tasks

Add Encounters

Within eRx, you can track patient encounters. These are times you saw and interacted with the patient.

- To add an encounter, from the context bar, click the **Check Box** () icon.
- To add previous encounters, click the **Calendar** () icon to open the **Patient Encounter Management** widget.
  - From the **Patient Encounter Management** widget, you can select the rendering provider, add and/or edit previous encounters.

Work with Pharmacy Messages

Pharmacy Messages are electronic requests generated by a pharmacy.

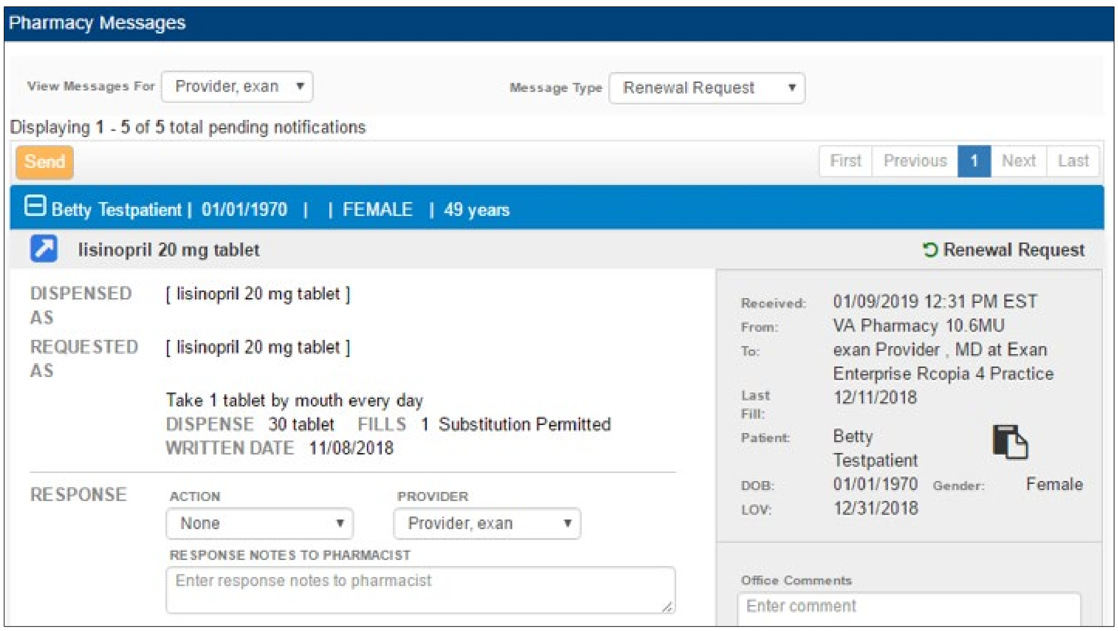
Examples: Refill requests for the patient once their medication refills are complete, change requests, or cancellation acknowledgments.

When your practice group has any pharmacy messages, a notification displays within the top toolbar.

To work with pharmacy messages:

1. Click the **Pharmacy Message** ( ) icon within the top toolbar to open the **Pharmacy Messages** widget.

2. From the **View Messages For** and **Message Type** drop-down lists, filter by provider and/or type.

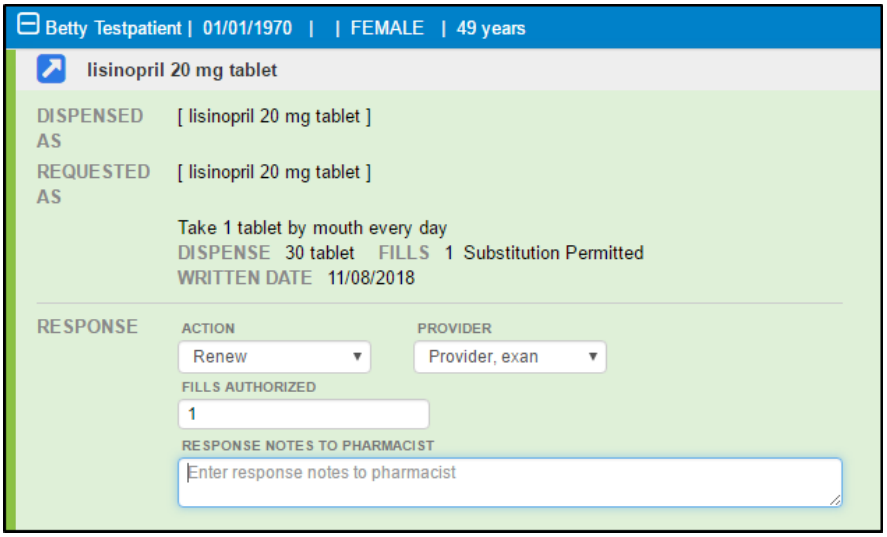


3. From the **Action** drop-down list, select an option for each renewal request:

   - **Deny**: Denies the request and sends a denial message to the pharmacy.
   - **Change:** Allows you to change the prescription and/or pharmacy information. When the prescription is changed, the prescription becomes a pending prescription in the appropriate provider's prescription report. This alerts the pharmacy that the requested renewal has been denied, but a new prescription will follow.
   - **Renew plus (X) refills:** Renews the prescription with the necessary number of additional refills. When you choose the appropriate refills, you are authorizing this fill plus X refills of the medication.

- **Forward:** Allows a staff member to forward the prescription request to another qualified prescriber in the practice.
- **Remove:** Removes the prescription request.

  Important: *Only use this for duplicate requests that are already handled.*



4. (Optional) Enter any pharmacy notes in the **Response Notes to Pharmacist** field.
5. (Optional) Enter comments in the **Office Comments** field.

   Note: *These comments are visible only to you and your office staff.*
6. After you have selected an action for each request, enter your **Signature Password** and click **Send**.

   Note: *You can take action on a maximum of 20 renewal requests at a time.*

   All requests with an action selected are completed and delivered to the correct pharmacy.

Set Utilities Options

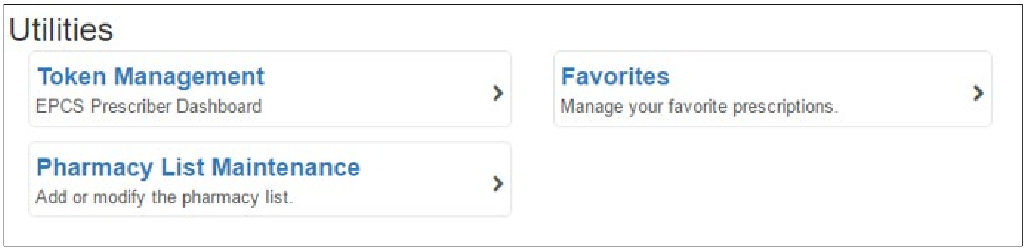
eRx includes several additional options within Utilities. These options include:

- **Token Management**: This allows EPCS providers to manage their token devices.
- **Favorites**: This allows user to create, categorize, modify, or remove any of their favorite prescriptions. For more information, see Manage Favorite Prescriptions.
- **Pharmacy List Maintenance**: This allows users to add or modify the practice pharmacy list.

Note: *Some options are only available for administrators.*

To access utilities:

1. From the menu (☰) icon at the top left of the screen, select **Utilities**.



2. Click **Token Management**, **Favorites**, or **Pharmacy List Maintenance** as necessary.

Manage Preferences

There are two preference types available in eRx.

User preferences apply only to a single user. Location preferences apply to all users within a practice location.

***Important**: Location preferences can only be set by an administrator.*

Set User Preferences

1. From the menu (☰) icon at the top left of the screen, select **Settings**.

   ***Tip**: You can also open **Settings** if you click your name from the top menu bar.*

2. Under **Manage Settings**, select **User**.
3. Set the user preferences as necessary.

Navigation	Description
Always start at this location	This allows users connected to multiple locations to select a default.
Always start on	This allows users to select which screen they begin on when entering e-prescribing. • **Patient Search** (default setting) • **Pharmacy Messages** • **Prescriptions Management**

Pharmacy	Description
Default pharmacy list to search	This allows users to select a default list when searching for pharmacies. • **Favorite List** • **Practice List** • **All Lists** (default setting)

Medication	Description
Hide inactive medications older than	This allows users to set default limitations for medication history results. • **No Limit** (default setting) • **3 Months** • **6 Months** • **1 Year**
Ask to reconcile prescription vs. medication when only quantity has changed	This allows users to set whether the reconciliation screen displays when they prescribe an active medication and change the quantity. • **No** (default setting) • **Yes**

Prescription	Description
Populate sig fields from previous prescriptions ("sticky" feature)	This allows the system to populate the sig fields with how the most recent providers at the practice prescribed the selected medication. ***Note****: This works for prescriptions written within the past 14 days.*
Include patient allergies on printed/faxed prescription	This allows users to set whether patient allergies display on printed/faxed prescriptions.

Custom additional directions to patient (one per line)	A custom prescription note may be a maximum of 210 characters. If a prescription exceeds the limit, it is sent via fax to the pharmacy. Users can find and use these notes through the **+** icon on the sig page next to the **Additional Directions to Patient** field.
Custom pharmacist notes (one per line)	Users can find and use these notes through the **+** icon on the sig page next to the **Directions to Pharmacist** field.
Custom prescription comments (one per line)	Users can find and use these notes through the **+** icon on the sig page next to the **Comments for Office Use Only** field.
Edit patient weight while prescribing	This allows users to edit patient weight on the **Prescribe Medication** screen.

Reporting	Description
Default provider to	This defaults the report filter to all providers or one specific provider.
Default prescription status to	This defaults the report filter to a specific prescription status. • **Pending Prescriptions** (default setting) • **Completed Prescriptions** • **All Prescriptions**
Default prescription management range	This defaults the report filter to a specific time range. • **Today** (default setting) • **Past 3 Days** • **Past 7 Days** • **Past 14 Days** • **Past 30 Days**
Include prescriptions from other locations	This allows users to set whether they view prescriptions from other offices. ***Note****: To set this option, users must be connected to multiple locations.*
Include cancelled prescriptions	This allows users to determine whether they can view cancelled prescriptions when reporting.

4. Click **Save** to apply the changes.

Set Location Preferences

Location preferences can only be set by an administrator and will apply to all users within a practice location.

1. From the menu (☰) icon at the top left of the screen, select **Settings**.

   ***Tip**: You can also open **Settings** if you click your name from the top menu bar.*

2. Under **Manage Settings**, select **Location**.
3. Set preferences as necessary.

Reminders	Description
Drug-drug interactions	This allows you to set which drug-drug interactions display. • **All interactions** (default setting) • **Severe and Contraindicated Only** • **Contraindicated Only**
Drug-allergy interactions	This allows you to set which drug-allergy interactions display. • **All warnings** (default setting) • **Ingredient and Specific Group Allergies Only**
Drug-diagnosis interactions	This allows you to set which drug-diagnosis interactions display. • **Contraindicated for Exact Diagnoses Only** (default setting) • **Contraindicated for Exact and Related Diagnoses** • **Contraindicated or Evaluation Needed for Exact Diagnoses Only** • **Contraindicated or Evaluation Needed for Exact diagnosis and Related Diagnosis** • **All Warnings for Exact Diagnoses Only** • **All Warnings for Exact and Related Diagnoses**
Geriatric warnings	This allows you to set which geriatric alerts display. ***Note**: We recommend **All Warnings** for this setting.*
Pediatric warnings	This allows you to set which pediatric alerts display. ***Note**: We recommend **All Warnings** for this setting.*

Drug-drug interaction against External Medication History (past 120 days)	If set to **Yes**, eRx utilizes a patient's PBM/Pharmacy history (if available) for drug-drug interactions. ***Notes**:* • *This is the default setting.* • *The PBM history includes prescription fills within the last 120 days, if available.*
Duplicate therapy check against External Medication History (past 120 days)	If set to **Yes**, eRx utilizes a patient's PBM/Pharmacy history (if available) for duplicate therapy checks. Providers can then confirm that the patient is taking the medication on the history before making a clinical decision. ***Note**: The PBM history includes prescription fills within the last 120 days, if available.*
Allow drug interaction checking against medication list	If set to **Yes**, the system performs drug interaction checking against the medication list for patients.
Allow providers to suppress duplicate clinical alerts for 1 year	If set to **Yes**, clinical alerts can be suppressed for one year after they are initially received by a provider. This allows providers to avoid receiving the same alert continually.
When a user overrides prescription warnings	This sets whether users must enter a reason when overriding warnings. • **Require Users to Enter a Reason** • **Allow Users to Enter a Reason, But do not Require It** (default setting) • **Do not Permit Users to Enter a Reason**
Populate sig fields from previous prescriptions ('sticky' feature)	If set, this allows the system to populate the sig fields with how the most recent providers at the practice prescribed the selected medication. ***Note**: This works for prescriptions written within the past 14 days.*

Diagnosis	Description
Supported diagnosis codes	This allows diagnosis codes as options in the **Diagnosis** widget. Options include: • **ICD-10 (Complete)** • **ICD-10 (Billable)** • **SNOMED CT** • **ICD-9**.**No Limit** (default setting)

Medication	Description
Retain office comments and directions to Pharmacist when renewing/prescribing a medication	If set, this allows previous notes to the pharmacist and staff to be retained on renewals.
Default external medication history range	This defaults the medication history to a specific range. • **No Automatic Search** • **Over Last 30** (default setting) • **Over Last 90 Days** • **Over Last 180 Days** • **Over Last 365 Days**
Default prescription management range	This defaults the report filter to a specific time range. • **Today** (default setting) • **Past 3 Days** • **Past 7 Days** • **Past 14 Days** • **Past 30 Days**
Allow incomplete drug definition	If set to **Yes**, users can add medications onto the active medication list without selecting a strength of the given medication.
Allow specifying medication history source	If set to **Yes**, users can view where a medication history result came from.

Enable "Quick Add" without medication details	If set to **Yes**, users can add medications onto active medication list with only the medication and strength.

Allergy	Description
Enable "Allergy Severity"	This allows an optional allergy severity dropdown to display when recording allergies.

Prescriptions	Description
Allow a provider to approve a prescription without entering a signature password	If set to **Yes**, providers can send prescriptions to the pharmacy for filling without having to enter a signature password. ***Important**: Certain states require signature passwords to be used as part of the electronic prescribing process; please refer to your state rules prior to disabling this feature.*
Enable prescription controls on the Review Prescription screen	If set to **Yes**, the practice can add the Action buttons to the **Review Prescription** screen.
Enable Patient Notification via SMS text	If set to **Yes**, the check box that displays in the Pending Prescription for the **Patient** widget and the prescription **Review** screen is selected by default. This allows an SMS text message to be sent to the patient upon signing a prescription. Patients can see the pharmacy to which the prescription was sent along with coupons and drug pricing.
Require provider to sign prescriptions printed by staff	If set to **Yes**, provider signatures are needed on printed prescriptions.
Allows prescriptions to be save as pending without sig and quantity	If set to **Yes**, this allows prescriptions to be generated and saved without including sig or quantity data. This is good for the staff who do not know the sig but can still create and send to the physician's queue for completing. ***Note**: This is the default setting.*
Auto-set medication stop date based on prescription duration	If set to **Yes**, when an active medication's duration expires, it automatically discontinues and moves to inactive medication list.

Print clinical and formulary warnings on printed/faxed prescriptions	If set to **Yes**, any drug and/or allergy interaction and/or exclusion warnings are automatically included on all printed and/or faxed prescriptions.
See pending and undeliverable prescriptions across all of your locations	If set to **Yes**, users can see pending and deliverable prescriptions from other locations.
Prescription security features note to include on printed prescriptions (max 100 chars)	If set to **Yes**, this allows a printed message to display on all prescriptions practice-wide.
Custom additional directions to patient (one per line)	A custom prescription note may be a maximum of 210 characters in length. If a prescription exceeds the limit, it will be sent via fax to the pharmacy. Users can find and use these notes through the **+** icon on the sig page next to the **Additional Directions to Patient** field. ***Note**: The custom text option displays for all users within a location.*
Custom pharmacist notes (one per line)	Users can find and use these notes through the **+** icon on the sig page next to the **Directions to Pharmacist** field. ***Note**: The custom text option displays for all users within a location.*
Custom prescription comments (one per line)	Users can find and use these notes through the **+** icon on the sig page next to the **Comments for Office Use Only** field. ***Note**: The custom text option displays for all users within a location.*

Reporting	Description
Default pending prescription box to checked	If set to **Yes**, all pending prescriptions on the prescription report are selected. ***Note**: We recommend setting the option to **No** so that physicians must select the prescriptions they want to approve. This helps prevent accidentally approving another physician's prescriptions.*
Show patient's responsible provider on reports	If set to **Yes**, the patient's primary care provider (PCP) displays in the status bar.

Show complete office comments on reports	If set to **Yes**, office comments display on reports.
Show pharmacy name on reports	If set to **Yes**, the pharmacy name displays on reports.
Show practice name on reports	If set to **Yes**, the practice name displays on prescription and medication reports.
Show prescriber name on medication reports	If set to **Yes**, the prescriber name displays on medication reports.

Miscellaneous	Description
Allow providers to manage their provider agents	If set to **Yes**, providers can manage agents from the menu () icon > **Utilities** > **Manage My Agents**.
Include link to drug information reference site on prescribe screen	If set to **Yes**, eRx provides a link on the **Enter Details** screen to access a drug reference website (RxList). ***Note:*** *Site has ads and is not affiliated with eRx.*
System name required to enter patient External ID	This identifier is used to link eRx to a Practice Management or EMR. If set, it is a required entry for all patients added to eRx**.**
System name of patient External ID to display on prescriptions and reports	A text box provided to automatically display patient/external ID on all prescriptions and reports. ***Note***: *This is not used by smaller practices.*
Label prefix for patient External ID	At text box provided to provide an External ID label for the External ID name.
Include enterprise name with location name	If set to **Yes**, the enterprise name displays across the top of the screen.
Allow partial date for medication and allergy onset	If set to **Yes**, users can add use partial start dates when adding medications and allergies. **Example**: A user can add a start date that is the year only, not a month or day. ***Note***: *If not set, a user must input the a month, day, and year.*

Enable Transition of Care logging	If set to **Yes**, a transition of care link displays within the patient chart, allowing the user to document the date.
Include Transition of Care and encounter data in EMR/PMS interface data	If set to **Yes**, transition of care and end encounter information is sent back to the PMS or EMT. ***Note**: If not set, the date is retained in eRx only.*
Remember signature password for	If set, the system remembers the signature password for the selected amount of time. • **Never** (default setting) • **5 Minutes** • **15 Minutes** • **30 Minutes** • **45 Minutes** • **60 Minutes**

Patient Advisor	Description
Enable adherence plans	If set to **Yes**, users are prompted for adherence plans (if available) while prescribing.
Enable patient education material and/or support programs	If set to **Yes**, users can access educational material provided for patients.
Enable prescriptions savings offers (Co-pay Cards, Vouchers)	If set to **Yes**, users can include savings on prescriptions for patients.
Enable electronic Prior Authorization (ePA)	If set to **Yes**, the ability to process prior authorizations displays.

Prescription Favorites	Description
Enable Practices Favorites List	Permitted users can use/modify favorites created at a practice level. • **Admin** • **Only Prescribers with Signing Permission** • **All Users**

Enable Location Favorites List	Permitted users can use use/modify favorites created at a practice location level. • **Admin** • **Only Prescribers with Signing Permission** • **All Users**
Enable User Personal Favorites	If set, users can save and access their own favorite list.
Enable Recently Prescribed Display	If set to **Yes**, users can access the list of recently prescribed favorites. ***Note:*** *If your practice is an enterprise with multiple groups / locations setup, these settings must be done for each individual group / location.*

4. Click **Save** to apply the changes.

Appendix A: Identity Authentication

All providers that will use eRx must pass one of the following identity authentication processes successfully before they may prescribe medications:

- **IDP**: Identity Proofing (IDP) is a Level of Assurance 2 (LOA2) standard that, when passed, satisfies Surescripts requirements and allows providers to e-prescribe medications.
- **EPCS Gold**: Electronic Prescribing of Controlled Substances (EPCS) Gold is an identity proofing standard that, when passed, allows providers to e-prescribe controlled substances as well as regular medications, using a soft or hard token that is registered to their account.

  Important*: Provider user types require IDP or EPCS Gold authentication. Non-provider user types do not require identity authentication.*

As a provider, you can complete IDP or EPCS Gold authentication from the email(s) sent out as part of eRx user registration.

Complete IDP Authentication

1. Confirm you have received an invite email from infinidadmin@drfirst.com.

   The email contains a link to the IDP registration.

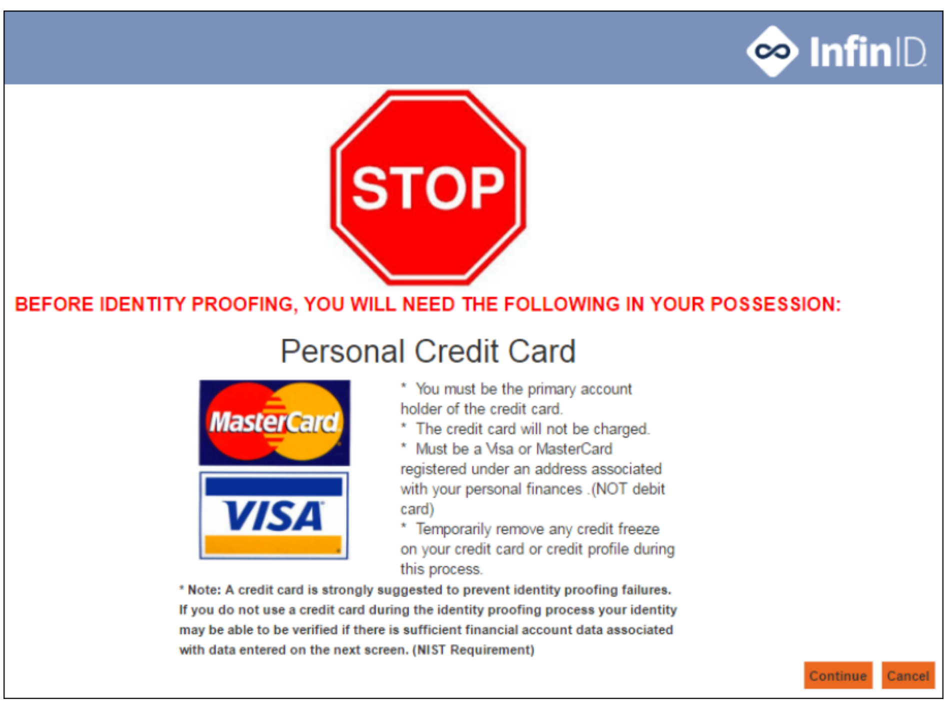
2. Open your email inbox to the IDP invitation email and click the link to begin the IDP process.

   The InfinID application opens and a notification requests for you to complete identity proofing.

3. Click **Next**, and when ready, click **Continue**.

   Note*: Experian uses financial history to verify a provider's identity. A personal credit card increases your chances of successfully passing the IDP process. You are not charged for IDP.*

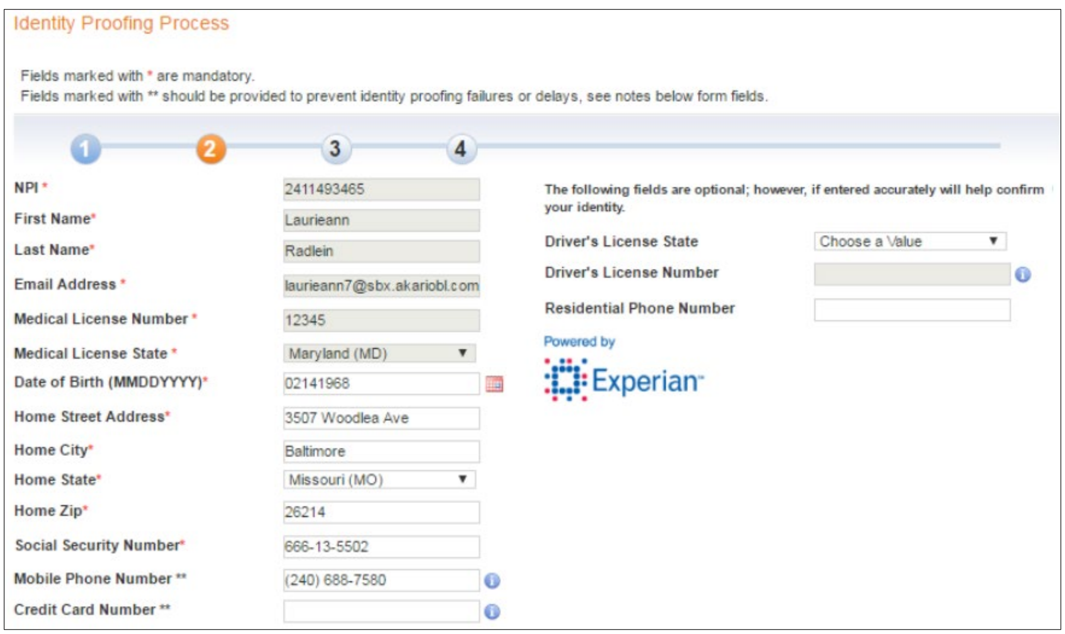
   

The **InfinID Application Terms of Use** page displays.

4. Select the check box and click **I Accept** to continue.

5. Complete the personal information fields.

***Note**: All required fields are noted with a red asterisk (*).*



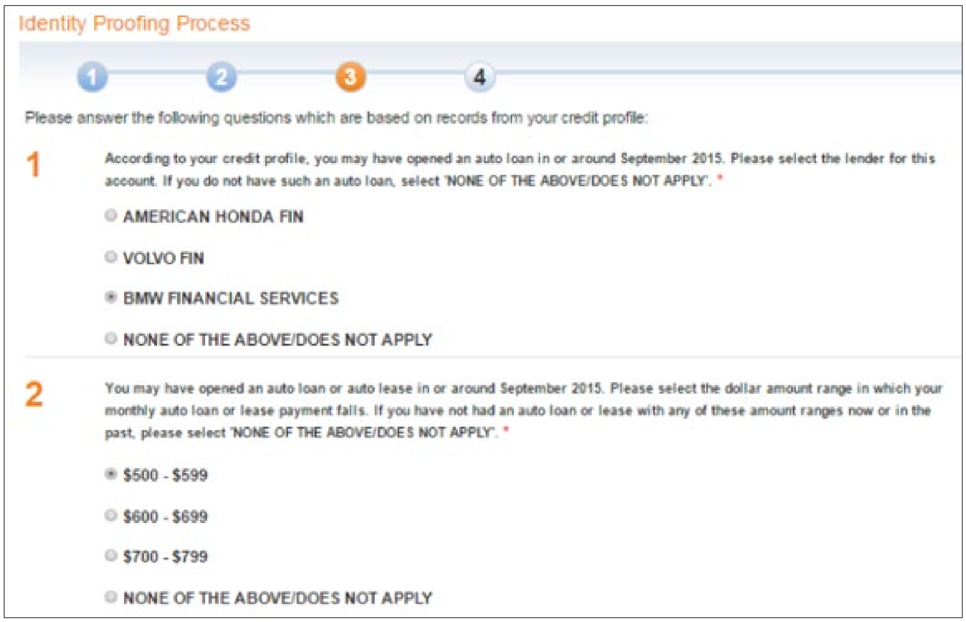
***Tips**:*

- *When entering your birthdate, click the calendar icon.*
- *When entering your address, remove any special characters.*

  ***Example**: Enter 1 E Main St Apt 204 without any periods.*

- *Enter your mobile number to speed up the process. If Experian verifies you are the primary account holder, they send a text with the IDP transaction number. If you do not enter your mobile number, or it cannot be verified, Experian mails you a letter with your IDP transaction number.*
- *If you enter a VISA or MasterCard personal credit card number, you greatly increase your chances of passing IDP. Only the first 8 digits are required, and no charges are applied.*

6. Click **Continue** to open three security questions related to your financial history.



7. Select the applicable answers and click **Continue**.

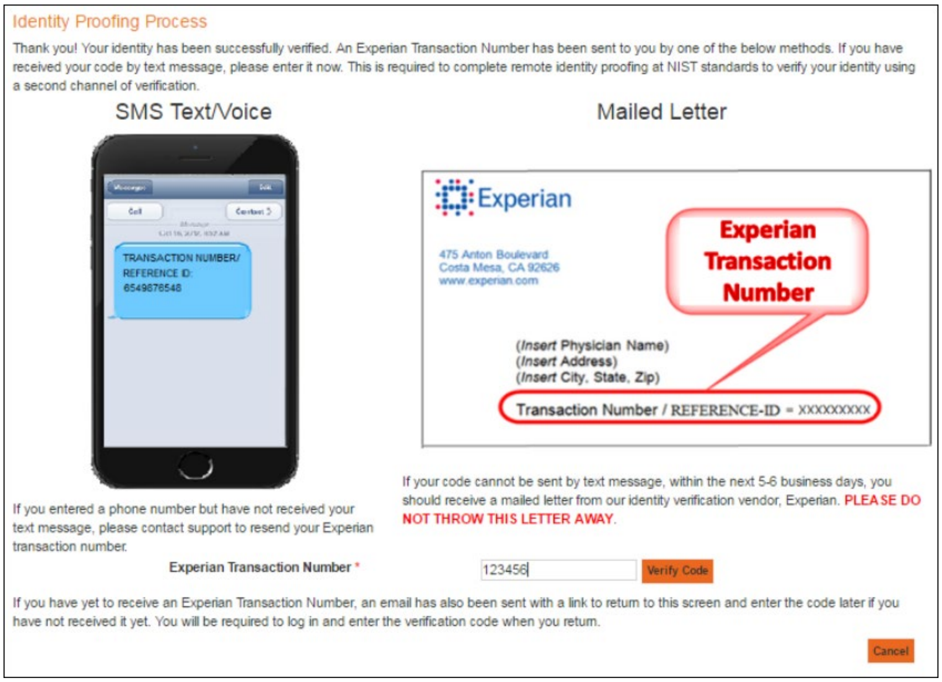
   If you answered the questions correctly, you will be notified via email that Experian has successfully verified your identity and that Experian will send you a letter or text message with a transaction number.

   ***Note**: You can only receive the transaction number via text message if you entered a verified mobile phone number earlier.*

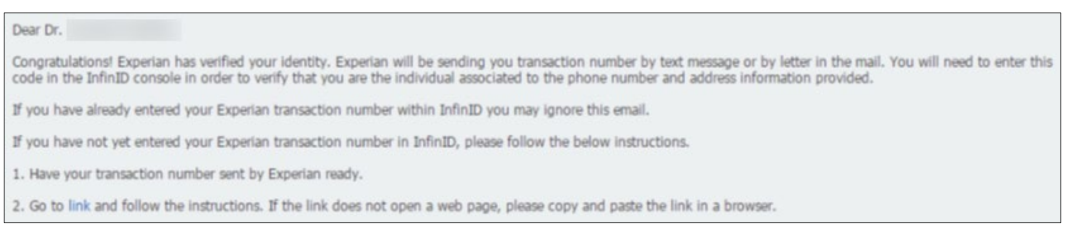
8. Complete one of the following:

- If you received the transaction number via text message, enter the transaction number in the **Experian Transaction Number** field and click **Verify Code** to complete identity proofing.

  Note: *The text message with the transaction number should arrive within a few minutes of successfully verifying your identity.*



- If you received the transaction number via letter, open the email that was sent when your identity was first identified and click the link to open an **Experian Transaction Number Verification** window.



Dear Dr.

Congratulations! Experian has verified your identity. Experian will be sending you transaction number by text message or by letter in the mail. You will need to enter this code in the InfinID console in order to verify that you are the individual associated to the phone number and address information provided.

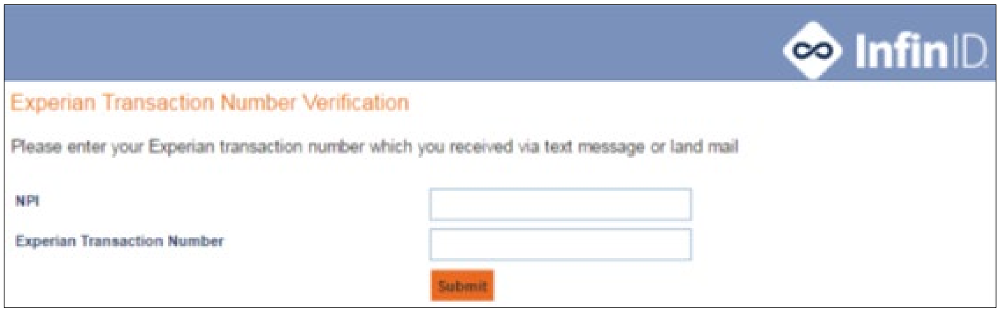
If you have already entered your Experian transaction number within InfinID you may ignore this email.

If you have not yet entered your Experian transaction number in InfinID, please follow the below instructions.

1. Have your transaction number sent by Experian ready.

2. Go to link and follow the instructions. If the link does not open a web page, please copy and paste the link in a browser.

9. In the **Experian Transaction Number** field, enter your transaction number from the letter and click **Submit**.



Complete EPCS Gold Authentication

1. Confirm you have the following perquisites:

   - Received at least one (1) hard or soft EPCS Token.

     ***Warning**: You cannot complete EPCS authentication without a token.*

     - Hard token: This is provided by Exan.
     - Soft token: This is provided by VIP Access smartphone/tablet app by Symantec.

   - Received an invite email from DO-NOT-REPLY-EPCS@epcsdrfirst.com.

     The email contains an Invite ID and a link to the EPCS Registration.

     ***Tip**: Save the email with the Invite ID in case you do not complete the process.*

   - Removed any security/credit freezes from credit accounts by contacting Experian.

     ***Note**: You can find instructions to remove these freezes/alerts at www.experian.com under **Additional Services & Products**.*

   - (Optional) Received a free EXPERIAN credit report from www.annualcreditreport.com

     Identity proofing questions are formulated based upon credit history. This may include questions about home/auto loans, bank account information, or places of residency, etc. Having your credit report available can assist in correctly answering those questions and successfully completing IDP.

   - (Optional) Obtained one valid personal Visa or Mastercard credit card.

     ***Note**:* Only the first eight digits are required.

     ***Important**: The card cannot be a business credit card or a personal debit card and you cannot pass IDP if protections are on your credit account.*

- (Optional) Obtained a valid personal residential or cellular phone number.

  ***Note**: This must be associated with the home address.*

  ***Important**: Using a personal credit card and/or personal phone number significantly increases your chances of validation.*

- Gathered your Social Security Number and DEA number.

  ***Note**: You cannot use a narcotics addiction DEA number (NADEAN).*

- Generated an idea for a passphrase and/or password.

  ***Note**: This must be a minimum of eight characters with at least one capital letter, one lowercase letter, and a number.*

  A passphrase is necessary for two-factor authentication required for sending controlled scripts.

  ***Tip**: Write down the passphrase and save it in a secure location.*

- Generated an idea for a security question and answer necessary when resetting your passphrase and/or password.

  ***Note**: Security answers are case sensitive.*

  Example: Use a mother's maiden name or the make/model of your first car.

2. Open the DrFirst email and click the link to open the EPCS Gold website.

   ***Tip**: You can also access the EPCS Gold website through Rcopia. Open Rcopia and click **EPCS Gold**.*

The EPCS Gold website opens and under **I have an Invite**, the credentials pre-populate in the **NPI#** and **Invite ID** fields.

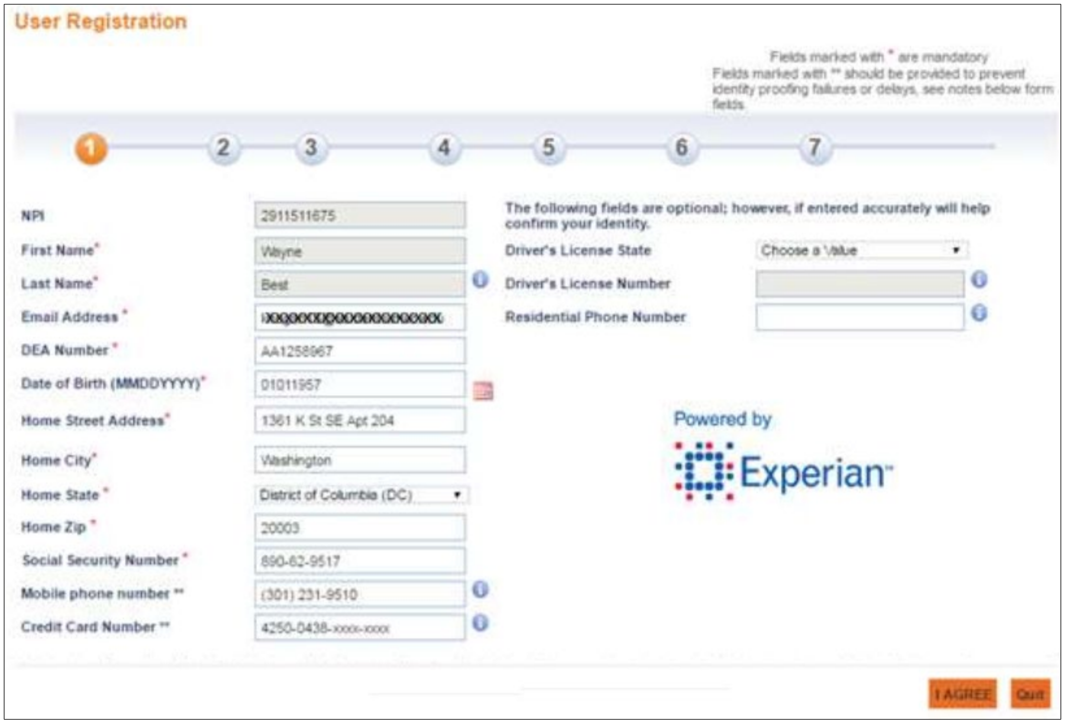
3. Confirm the fields are accurate and click **Proceed**.

4. Complete the Agreement for EPCS Gold Services.
   - Select all check boxes and click **I Agree**.

   A prerequisites page for EPCS Gold displays.
5. Confirm you have the following:
   - A hard or soft token
   - (Optional) A personal credit card.
6. When ready, click **Continue**.

7. Complete the **User Registration** personal information fields as necessary to verify your identity and click **I Agree**.

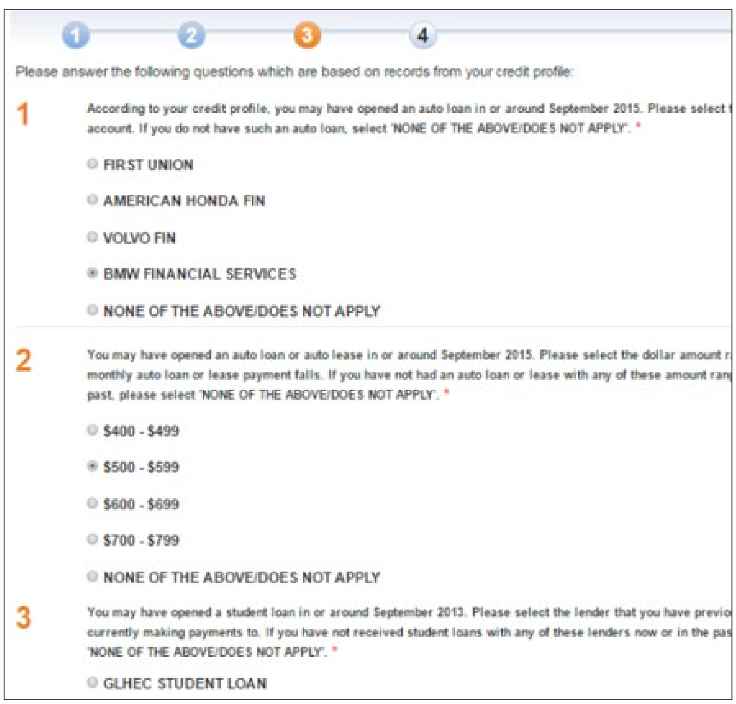
   ***Note**: All required fields are noted with a red asterisk (*).*



Field	Description
NPI / First Name / Last Name	These fields auto-populate with your NPI number and first and last name from the NPI Registry.
DEA Number	Enter your primary DEA number in capital letters. ***Important**: Do not enter a specialty DEA or DEA for prescribing addiction medications.*
Email Address	Enter your email address.
Date of Birth (MMDDYYY)	Click the calendar icon to select your birthdate.
Home Street Address / Home City / Home State / Home Zip	Enter your complete home address, leaving out any special characters and periods. **Example**: 1 E Main St Apt 204
Social Security Number	Enter your social security number.

Mobile Phone Number	Enter your mobile phone number. ***Note****: Experian uses this to send a text message with the EPCS transaction number. If not entered, Experian mails a letter with your EPCS transaction number.*
Credit Card Number	Enter the first eight (8) digits of your credit card number. ***Important****: A personal credit card increases your chances of successfully passing EPCS.*
Driver's License State	Enter the state your driver's license was issued in.
Driver's License Number	Enter your driver's license number.
Residential Phone Number	Enter your landline phone number.

8. Complete the three security questions related to your financial history and click **Continue**.



If the questions are answered correctly, you are notified that your identity has been successfully verified.

Note*: If you fail the verification, you must re-start EPCS from the beginning. If you fail three (3) times, your account is locked for 24 hours.*

9. Once you are verified, create a passphrase and security question, and click **Continue**.

   Note: *This must contain at least eight (8) characters, one number, and use both lower- and upper-case letters.*

   Tip: *Write down your passphrase and security question/answer and store it in a secure location.*

   Important: *DrFirst cannot reset your passphrase. It can only be reset by correctly answering your security question. If you forget your passphrase and cannot answer your security question, your account must be disabled, and you must go through EPCS again.*

10. Register your hard token or soft token.

    Tip: *We strongly recommend you register both a hard and soft token to your account as a backup.*

    Important: *You require your token each time you send a controlled prescription electronically or access your EPCS Gold account. If your token is lost, stolen, dies, or you get a new phone, you cannot access your account. Your account must be disabled, and you must go through EPCS again.*

a. Click **Add New Token**.

b. Complete the fields as necessary and click **Save New Token**.

Field	Description
Token Manufacturer	Select the manufacturer from the drop-down list.
Token Issuer	Select the issuer from the drop-down list.
Token Type	Select the type from the drop-down list.
Token Name	Enter a name for the token.
SIN or Credential ID	Enter your credentials.
OTP	Click the OTP number.

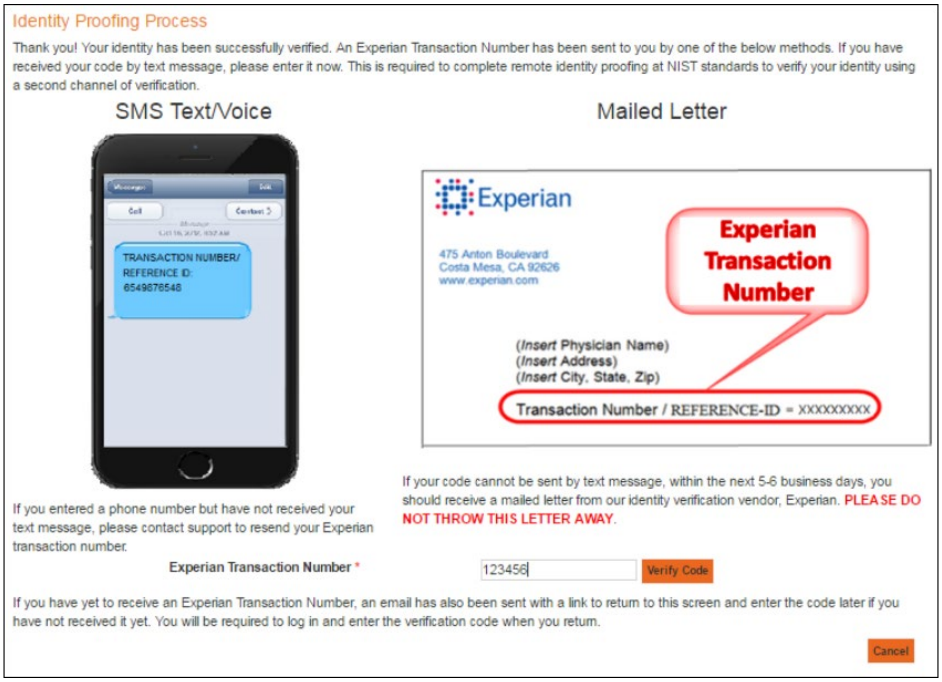
11. When the successful activation message displays, click **Continue**.
12. If necessary, repeat Steps 10-11 to register additional tokens.

    If you added a mobile number earlier and Experian verified it, you will receive a SMS message with a transaction number.
13. Verify the transaction number.

    a. Click the prescriber dashboard link to open your EPCS Gold Prescriber Dashboard.

    b. In the **NPI** and **Passphrase** fields, enter your login credentials.

14. Enter the transaction number and click **Verify Code** to complete identity proofing.



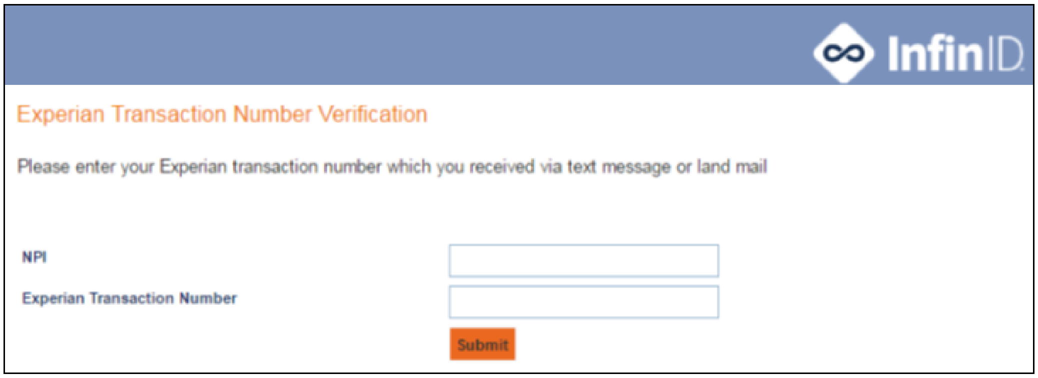
You will also receive a confirmation email that Experian has verified your identity.

15. Open the email and click the link.

> Dear Dr. Laurieann Radlein,
>
> Congratulations! Experian has verified your identity. Experian will be sending you transaction number by text message or by letter in the mail. You will need to enter this code in the InfinID console in order to verify that you are the individual associated to the phone number and address information provided.
>
> If you have already entered your Experian transaction number within InfinID you may ignore this email.
>
> If you have not yet entered your Experian transaction number in InfinID, please follow the below instructions.
>
> 1. Have your transaction number sent by Experian ready.
>
> 2. Go to link and follow the instructions. If the link does not open a web page, please copy and paste the link in a browser.
>
> If you have any further questions, please contact support at DrFirst Inc support.
>
> DrFirst Inc
> 9420 Key West Ave
> Rockville MD
> (888) 263-6512
> support@drfirst.com

The link opens an **Experian Transaction Number Verification** window.

16. Enter your Experian transaction number that you received from the text message or mailed letter and click **Submit**.



Appendix B: Glossary

Field	Description
Medication	A drug that the patient is already taking.
Prescription	A written or electronic medication order.
Electronic Prescription	A prescription sent directly to a pharmacy through Surescripts.
Fax prescription	A prescription sent directly to pharmacy and printed from a fax machine.
Category Search	Allows the use of therapeutic categories to find the list of drugs.
Refills	The number of times a prescription can be refilled at the pharmacy.
Renewals	A request from the pharmacy to obtain additional refills on a prescription or receive an updated prescription.
Eligibility	Determines whether the patient has a prescription drug benefit.

Formulary	A list of drugs covered by the insurance or health plan
PBM/Pharmacy History	A list of medications that the patient has taken in the past. This information may be obtained via the health plan, PBM (Patient Benefit Manager) or pharmacy.
Coinsurance	The percentage the patient will pay for their prescription.
Formulary coverage codes	Codes that will determine prescription drug benefit coverage for a particular medication, such as step therapy(ST), or prior authorization (PA).
Formulary status	Status determined by the health plan. Drug can have formulary or non-formulary status or preferred status.
Prescription status	Status to determine whether the prescription has been received by the pharmacy.

axiUm Change List

7.03

New document to replace previous documentation