NextGen 5.9/8.4 Upgrade EHR Training

Medications Module

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Agenda

- Medications Module
  - Medication Reconciled Checkbox
  - Limit Oral Liquid Medication Units
  - Order Date/Start Date on Rx Print/Fax
  - RxFill
  - RxCancel
  - RxChange
  - Electronic Prior Authorization (ePA)
- Controlled Substance Prescribing
  - Prescription Drug Monitoring Report (PDMP)
  - New Crystal Report for Auditing PDMP Views by User

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RxFill

- Message from pharmacy displaying whether Rx has been filled
  - Optional
- Message Statuses
  - **Dispensed:** Prescription has been dispensed to patient
  - **Not Dispensed:** Prescription was not dispensed to patient and medication was returned to stock
  - **Partially Dispensed:** Prescription was only partially dispensed to patient (i.e. insurance limitations)
  - **No Status:** Pharmacy has not sent RxFill status back to EHR
  - **Not Participating:** Pharmacy does not participate in RxFill

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RxCancel

- Sends electronic cancellation message from prescriber to pharmacy for previously ePrescribed medication
  - Optional
  - Allows prescriber to correct mistakes if prescription sent in error, discontinue any remaining refills, or cancel active prescription if therapy should be adjusted
  - Cancellation message sent to pharmacy when the medication is stopped or marked as ineffective from the Medications Module
  - Pharmacy must participate in RxCancel

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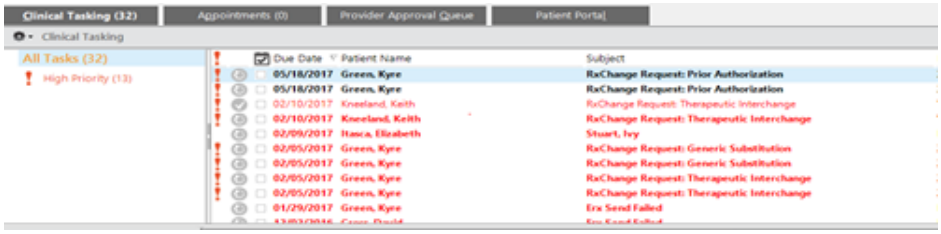
RxChange

- Message from pharmacy requesting change to original Rx
  - Optional
- Similar to eRefill request – task received in user's Inbox
  - Can configure RxChange requests to go to specific workgroup



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RxChange

- Request can be Approved, Approved with Changes, or Denied
  - **Approve:** Accept suggested change request without additional modifications
  - **Approve with Changes:** Approve suggested change with modifications
  - **Deny:** Keep original prescription (must include denial reason)

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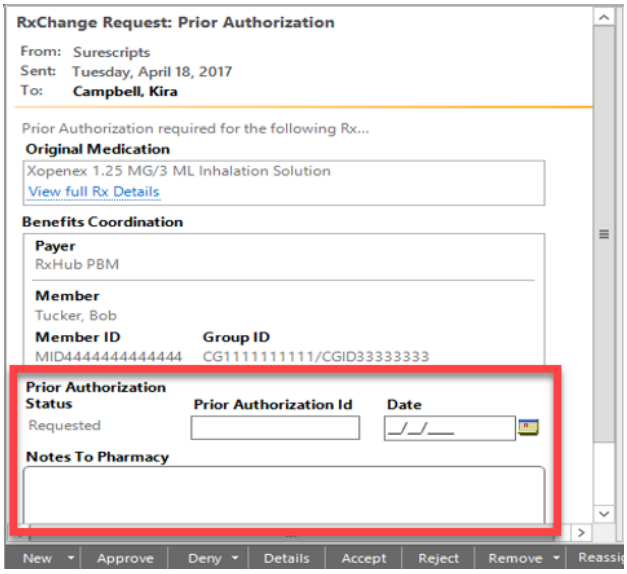
RxChange

- Message Types
  - **Prior Authorization:** Prior authorization needed for patient's insurance
    - Users can only approve or deny request (cannot approve with changes)
    - User must enter valid Prior Authorization ID in order to submit approval



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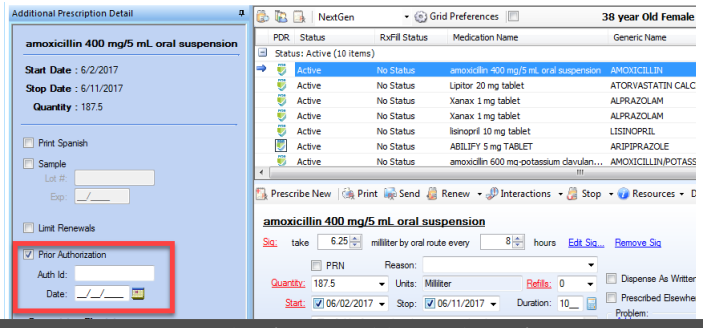
RxChange

- Message Types
  - **Prior Authorization:** Prior authorization needed for patient's insurance
    - Prior authorization details will be updated in the patient's Medications Module under the Additional Details sidebar



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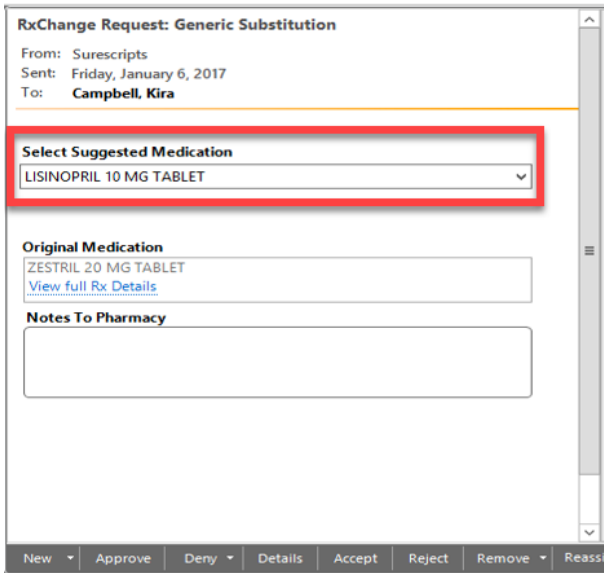
RxChange

- Message Types
  - **Generic Substitution:** Generic substitution is available for the prescribed medication
    - Pharmacy can send a request with more than one medication suggestion for original medication
    - Users can only approve or deny request (cannot approve with changes)



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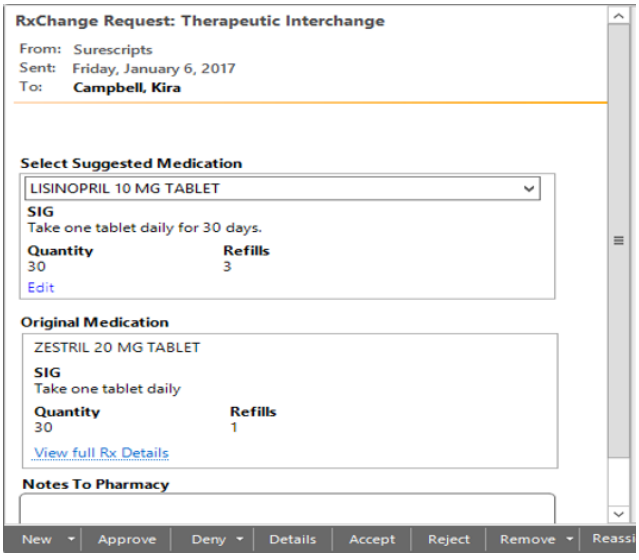
RxChange

- Message Types:
  - **Therapeutic Interchange Request:** Pharmacy recommends a change be made to prescribed medication for therapeutic reasons or to assist with patient compliance
    - Pharmacy can send a request with more than one medication suggestion for original medication
    - Users can approve, approve with changes, or deny request



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Electronic Prior Authorization (ePA)

- New functionality to allow users to manage all medication prior authorization needs directly from within EHR
- Providers/staff can request Prior Authorization approval when medication order is created – prior to sending to pharmacy
- Request completed for one medication at a time
- Prior Authorization requirements based on PBM associated with patient
  - Formulary Eligibility Check must be run before ePA data can be obtained
  - If patient does not have formulary eligibility, ePA process will be cancelled

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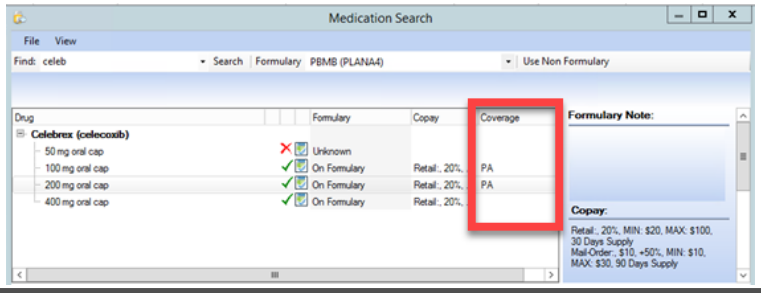
Electronic Prior Authorization (ePA)

- Workflow:
  - **Create medication order**
    - Either Default Favorites or Formulary Medication Search can be used to search for medication
    - If Formulary Medication Search is used, Prior Authorization (PA) will show in the Coverage Status column



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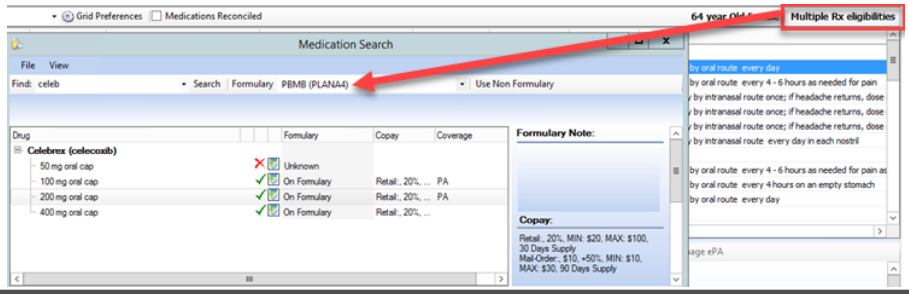
Electronic Prior Authorization (ePA)

- Workflow:
  - **Create medication order**
    - If patient is eligible for more than one formulary, user can set desired formulary in Formulary Medication Search
    - User may be prompted to choose PBM when request initiated



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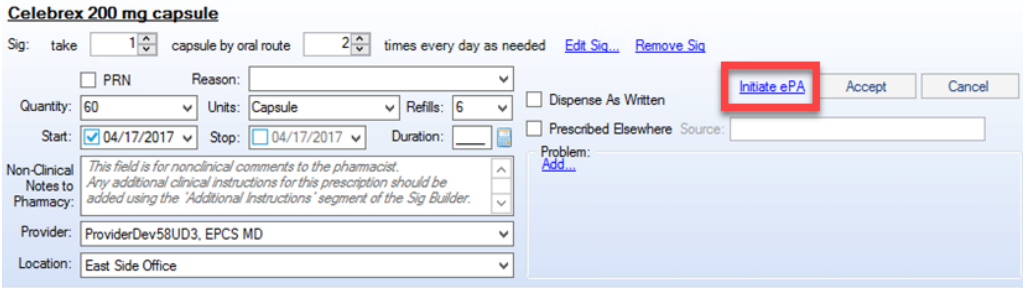
Electronic Prior Authorization (ePA)

- **Click Initiate ePA link**
  - User clicks Initiate ePA link in Medications Module
    - Medication is locked for edit until PBM responds with next step
    - Patients must have formulary eligibility before an ePA can be initiated
      - If patient has multiple eligibilities, a Choose PBM popup may appear



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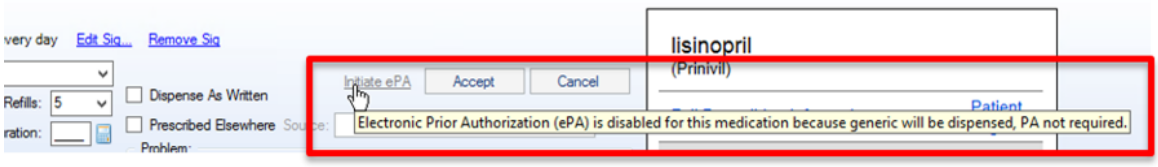
Electronic Prior Authorization (ePA)

- **Click Initiate ePA link**
  - Initiate ePA link may be disabled
    - Hovering over link will display tooltip that explains why disabled
      - i.e. Can't be initiated because Practice Preferences are set to "Always Send Generic if not DAW"



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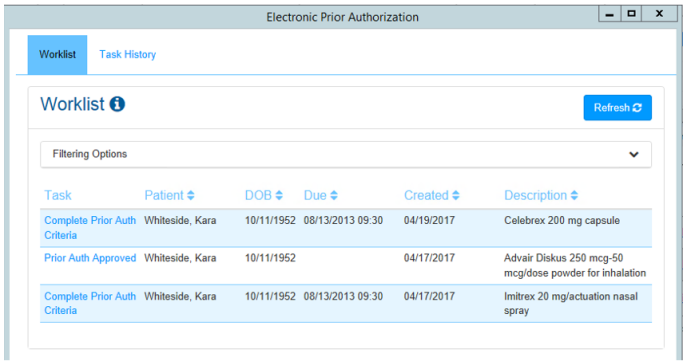
Electronic Prior Authorization (ePA)

- **Manage ePA window**
  - When Manage ePA accessed, window will launch to Worklist
  - Allows user to communicate with PBM for any medications requiring prior authorization



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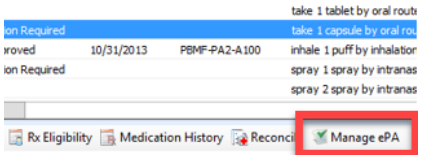
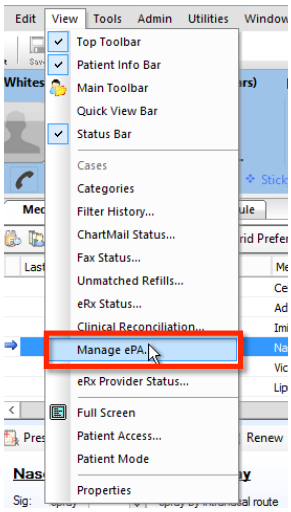
Electronic Prior Authorization (ePA)

- **Manage ePA window**
  - Accessing Manage ePA window:
    - Medications Module > Manage ePA button
      - **Patient Mode** – Requests managed for current patient only
    - View Menu > Manage ePA
      - **Provider Mode** – Requests managed for all patients for Current Provider





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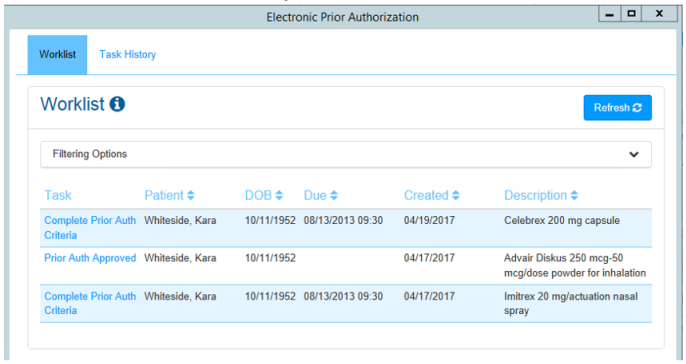
Electronic Prior Authorization (ePA)

- **Complete and Submit Question Set**
  - PBM responds to request with Question Set, typically within seconds
  - All information necessary to obtain authorization in Question Set



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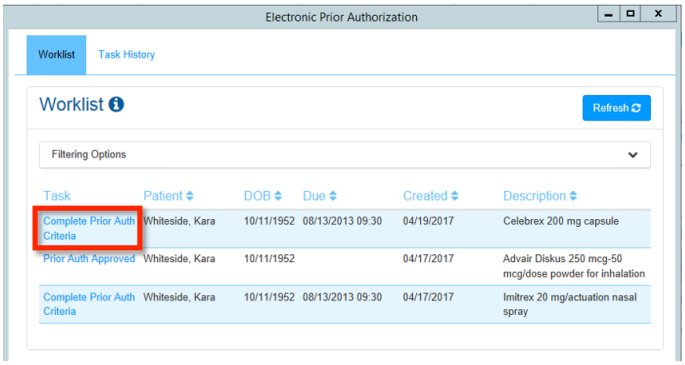
Electronic Prior Authorization (ePA)

- **Complete and Submit Question Set**
  - User clicks Complete Prior Auth Criteria link for medication to launch Question Set
    - Medication will display in Description column



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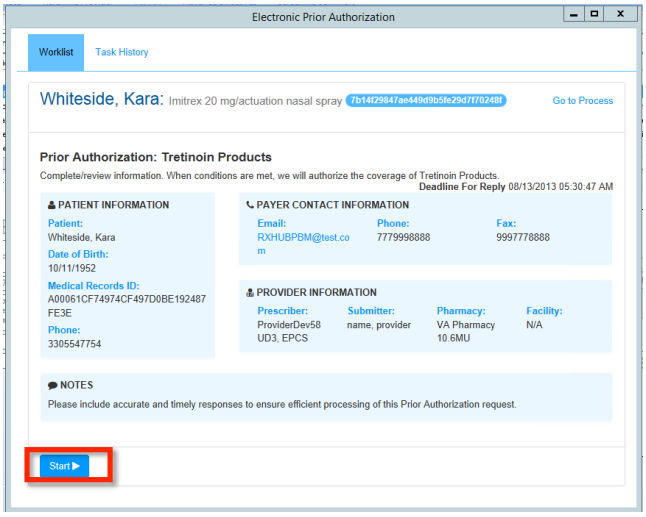
Electronic Prior Authorization (ePA)

- **Complete and Submit Question Set**
  - ePA Overview window displays
  - User clicks Start to begin Question Set



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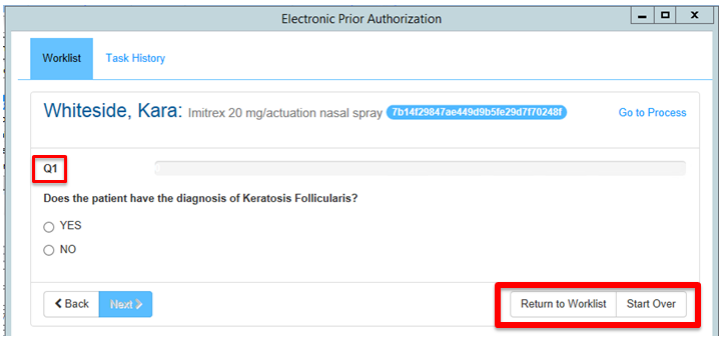
Electronic Prior Authorization (ePA)

- **Complete and Submit Question Set**
  - Question Set is completed
    - Survey style
    - User can start over at any time
    - User can return or exit tool at any time
      - Will save progress



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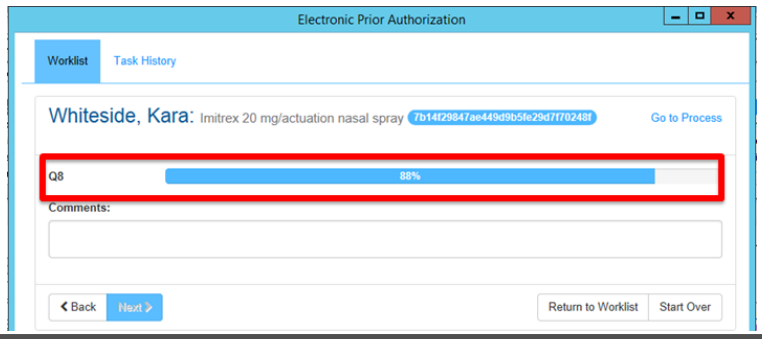
Electronic Prior Authorization (ePA)

- **Complete and Submit Question Set**
  - Question Set is completed
    - Progress bar displays how much has been completed
    - Once Question Set has been completed, the user is able to submit the data back to the PBM



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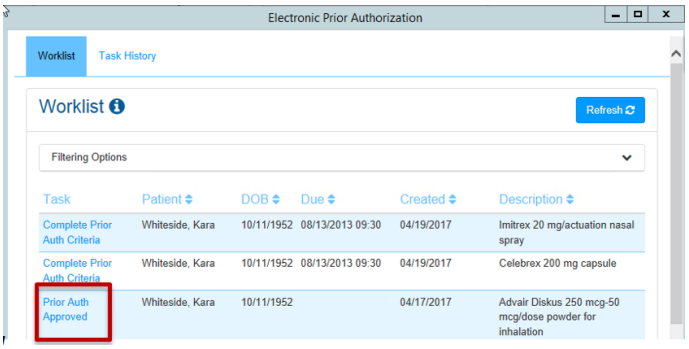
Electronic Prior Authorization (ePA)

- **View Approval/Denial Responses**
  - Worklist tab of ePA window displays Approval/Denial Response from PBM
  - Separate item with status in Task column



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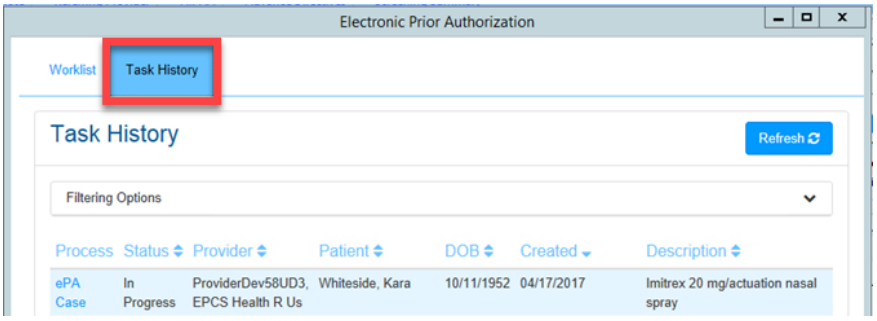
Electronic Prior Authorization (ePA)

- **View Approval/Denial Responses**
  - Task History tab
    - Initiate Appeals
    - View Historical ePA transactions



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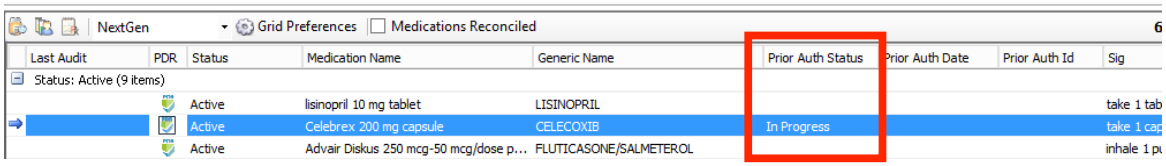
Electronic Prior Authorization (ePA)

- **View ePA Status**
  - Medications Module displays Prior Authorization Status
  - New column for Prior Auth Status
    - Column can be added by clicking Grid Preferences > Set Columns to Display



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Electronic Prior Authorization (ePA)

- **View ePA Status**
  - Statuses:
    - **PA Required** – Shows if particular medication requires authorization
      - Warning appears if user attempts to Send Rx without completing ePA
    - **In Progress** – Shows if authorization process has been initiated for medication
      - Warning appears if user attempts to send the prescription
    - **Action Required** – Shows if further action is needed to approve authorization
    - **Approved/Denied** – Authorization approval/denial has been received for medication
      - Approved requests can be sent to pharmacy via eRx, Fax, or Print
        - Includes all Prior Authorization Details when prescription sent
      - Denied Requests can be sent, but patient may pay more for medication
    - **Closed/Cancelled** – Shows if authorization request was cancelled by user
    - **Error** – Shows if there is a system error with the authorization

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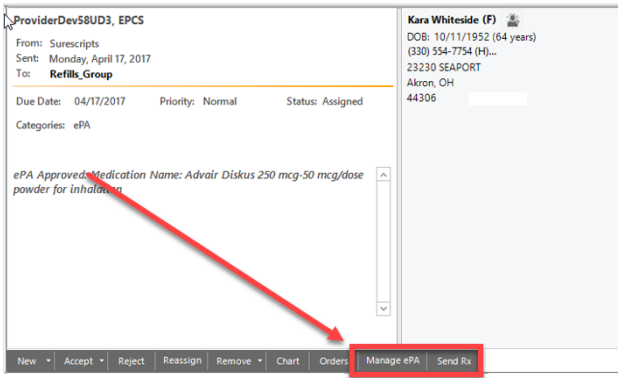
Electronic Prior Authorization (ePA)

- **ePA Integration with Tasking**
  - Users can perform actions associated with ePA directly from tasks (similar to eRefill task)
    - ePA specific workgroup designated for these requests
    - Accept task first, reassign if needed
    - From task, user can click Manage ePA button – launches Manage ePA window to Worklist tab
      - Complete Question Set as normal
    - After ePA approved, user can Send Rx from task (eRx only)
    - Task Auto-Completes when Manage ePA or Send Rx is complete (also auto-completes if completed in Med Module or View Menu)



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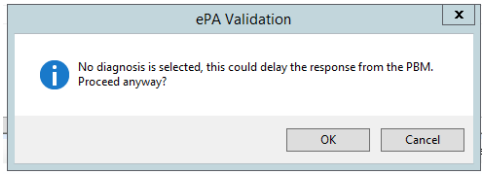
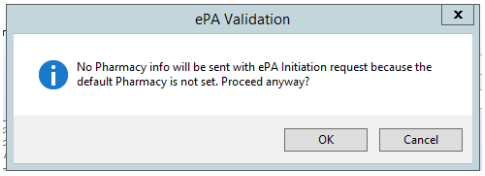
Electronic Prior Authorization (ePA)

- Best Practices
  - Add Diagnosis to Medication
    - Used as indication for medication
    - Speeds up ePA process as PBM typically requests this
    - Warning displays if no diagnosis selected
  - Add Default Pharmacy
    - Warning will display if no pharmacy selected





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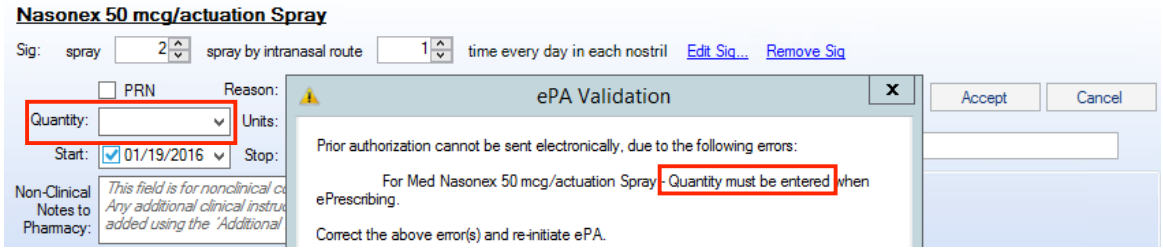
Electronic Prior Authorization (ePA)

- Best Practices
  - Complete all required medication details
    - PBM will need complete prescription details: SIG, Quantity



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Electronic Prior Authorization (ePA)

- Additional Details
  - Exclusion List Exceptions
    - ePA cannot be run for any patient that is on any user's exclusion list
      - Manage ePA window cannot filter restricted patients
      - Existing Prior Authorization process would need to be used
    - ePA cannot be run through the View Menu (Provider Mode) by any user with a patient in his/her exclusion list
      - User can still initiate and manage the ePA for individual patient through Medications Module
  - ePA Case # and Prior Authorization Status displays on the RxPrint and RxFax documents

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Prescription Drug Monitoring Report (PDMP)

- Users can now view PDMP reports directly from the EHR
  - Many states now mandate prescribers to view PDMP report prior to prescribing controlled substances
    - This functionality qualifies towards one of the Clinical Performance Improvement Activities (CPIA) under the Merit-Based Incentive Payment System (MIPS)
  - PDMP Reports have been integrated into NextGen EHR to serve as alternative to accessing through third party
    - NextGen has partnered with Appriss Gateway for this integration
  - PDMP Reports provide real-time data (updated every 24 hours)
    - Shows detailed list of selected patient's controlled substance history from all pharmacies in the state
      - Multiple state configuration is allowed per individual state guidelines
      - Practices can make it required to view report prior to prescribing controlled substances

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Prescription Drug Monitoring Report (PDMP)

- Appriss Gateway
  - Each practice will contract directly with Appriss Health
    - Small annual fee per provider may apply
    - Some states may offer assistance with this fee
    - To find out if your state participates, receive additional information, and/or sign up with Appriss, complete the Appriss EHR Integration Sign-Up form
      - http://info.apprisshealth.com/ehrrequest
      - If you would like this functionality, please begin this process now
    - After signing up with Appriss Gateway, a unique PDMP User Name and Password will be given
      - Your TSI Upgrade Specialist will request your PDMP User Name and Password to complete configuration prior to go-live

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Prescription Drug Monitoring Report (PDMP)

- Functionality
  - PDMP integrated into following areas:
    - Medication Module
    - Clinical Tasking
    - Manage Refills
    - Unmatched Refills

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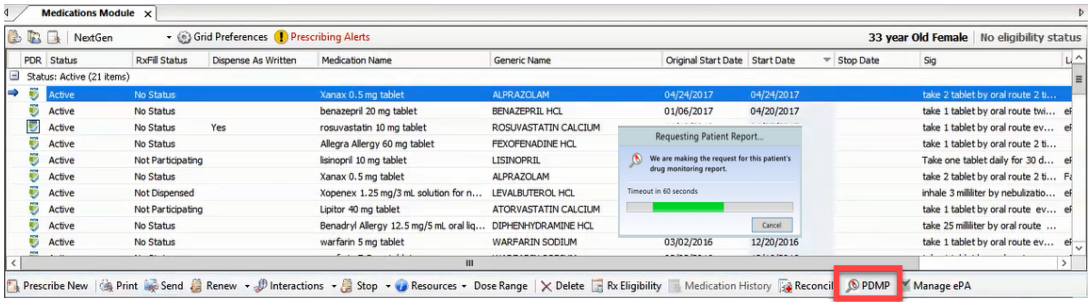
Prescription Drug Monitoring Report (PDMP)

- Access
  - Medications Module
    - Report can be generated manually or automatically
      - **Manual** – Click PDMP button



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Prescription Drug Monitoring Report (PDMP)

- Access
  - Medications Module
    - Report can be generated manually or automatically
      - **Automatic** – Runs report upon opening Medication Module or on encounter creation (just like eligibility checks)
        - Does not automatically launch report, but queues it up for faster loading of report

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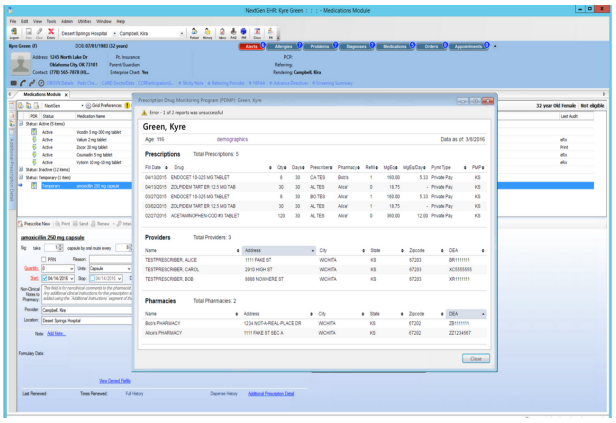
Prescription Drug Monitoring Report (PDMP)

- Workflow
  - Medications Module
    - When ready to prescribe medication, click PDMP button from Medication Module to review report details
      - NOTE: User must have permissions to run/view report



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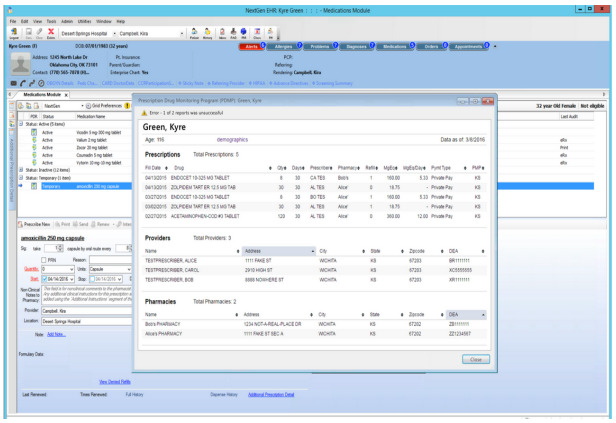
Prescription Drug Monitoring Report (PDMP)

- Workflow
  - Medications Module
    - When ready to prescribe medication, click PDMP button from Medication Module to review report details
      - NOTE: User must have permissions to run/view report
    - Review report details (prescriptions, prescribing providers, and pharmacies)



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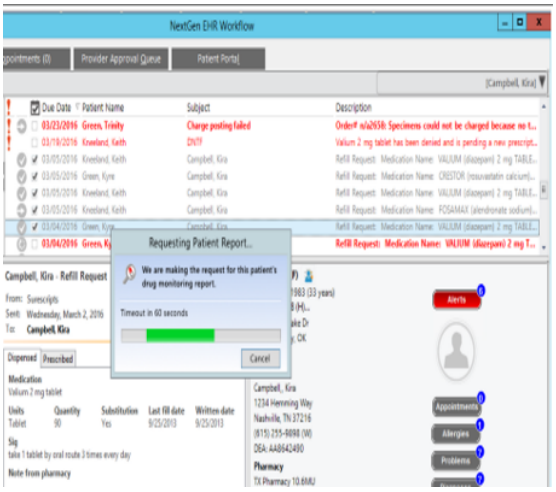
Prescription Drug Monitoring Report (PDMP)

- Workflow
  - Clinical Tasking
    - Used when accessing tasks where a controlled substance can be sent
      - Refill & RxChange Requests
    - When the user clicks Approve, PDMP report will automatically generate
      - NOTE: User must have permissions to run/view report



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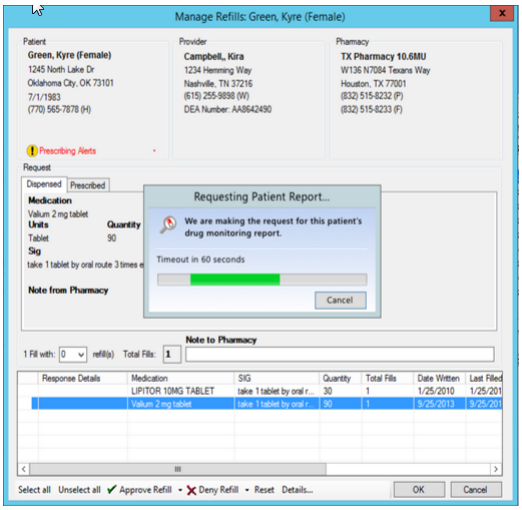
Prescription Drug Monitoring Report (PDMP)

- Workflow
  - Manage Refills
    - Used when accessing refill requests from the Medication Module
    - When the user clicks Approve, PDMP report will automatically generate
      - NOTE: User must have permissions to run/view report



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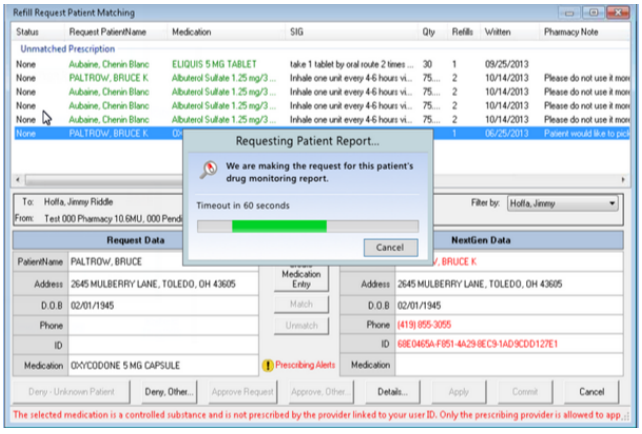
Prescription Drug Monitoring Report (PDMP)

- Workflow
  - Unmatched Refills
    - Used when accessing unmatched refill requests
    - When the user matches the refill and clicks Approve, PDMP report will automatically generate
      - NOTE: User must have permissions to run/view report



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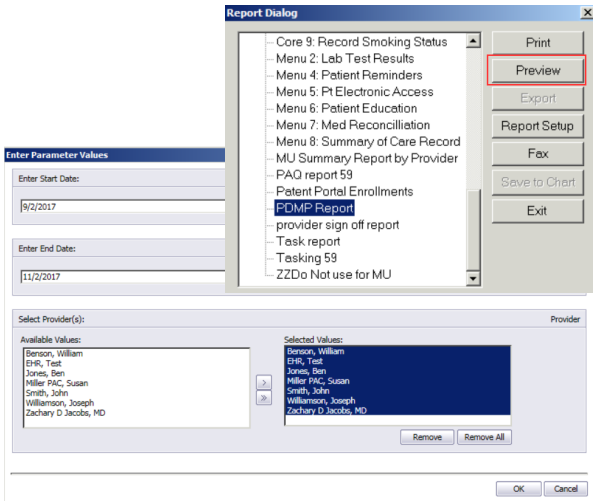
Prescription Drug Monitoring Report (PDMP)

- New Crystal Report for Auditing PDMP Views
  - Will show whether PDMP report was viewed prior to prescribing controlled substances
  - To Run:
    - File > Reports > Crystal Reports
    - All Encounters for All Patients
    - Highlight PDMP report and click Preview
    - Enter date range and provider parameters



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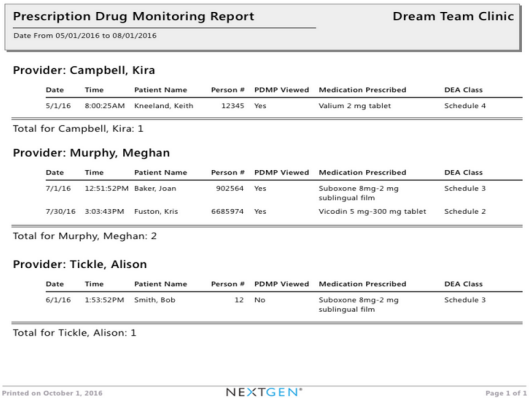
Prescription Drug Monitoring Report (PDMP)

- New Crystal Report for Auditing PDMP Views
  - PDMP Audit report will display
  - Shows controlled substance prescriptions by provider for specified timeframe and whether PDMP was viewed



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