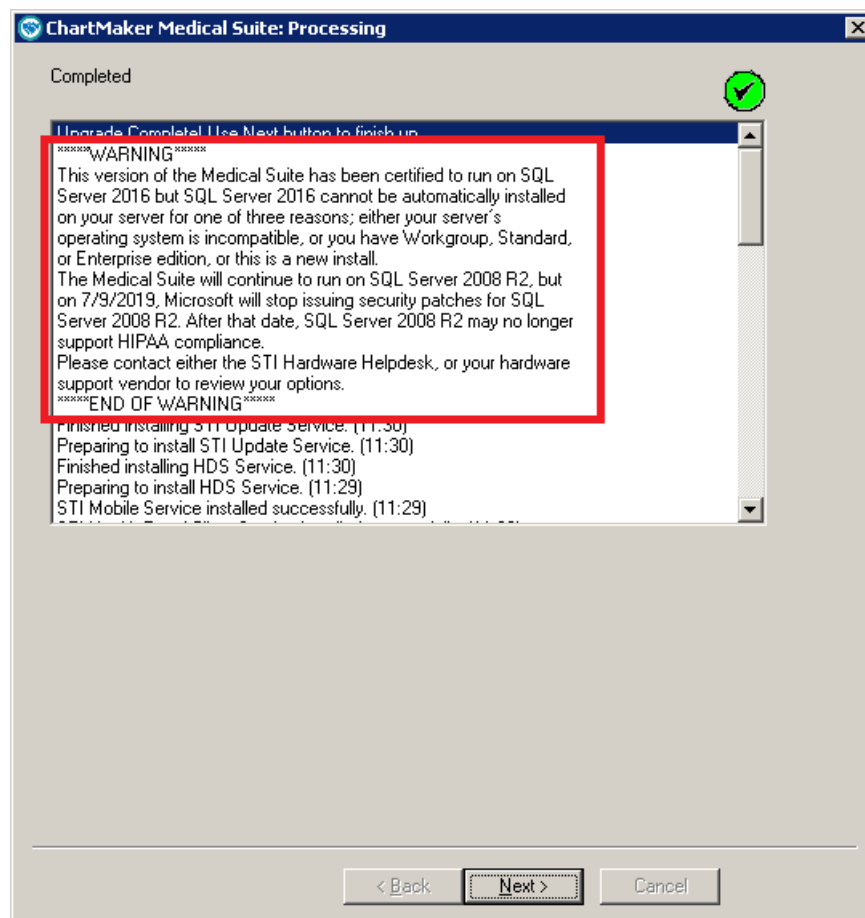


ChartMaker® Clinical Release Notes

ChartMaker® 2018.2 (fv6.4.0)

Important Notifications

- **Upgrade from Microsoft Server 2008 and Windows 7** – In January 2020, your Windows 7 workstations and Microsoft 2008 Servers will no longer be supported. Even with security patches, problems may still arise if you choose not to upgrade. In addition, your workstations will no longer be HIPAA compliant. To avoid potential issues in the future, contact our [Technical Services Department](#) today.
- **SQL Server 2016 & the ChartMaker 2018.2 (September 2018 Release) Upgrade** – Beginning with ChartMaker 2018.2 (File Version 6.3.3) Upgrade, a warning message will appear upon the completion of the upgrade regarding the transition of the ChartMaker Medical Suite to using SQL Server 2016, for those offices where an automated upgrade to SQL Server 2016 was not possible. See the figure below. If you are receiving this message, to avoid potential issues and to ensure your system remains HIPAA compliant, it is important to contact either STI Hardware Helpdesk, or your software vendor, to review your options.



ChartMaker Medical Suite SQL Server 2016 Warning

Added Features

- **Audit – EPCS Auditing** – The EPCS Auditing dialog (**Chart > Audit > EPCS Audit Trail and Drug Log**) has been updated to accurately display those audit events related to various EPCS changes made through CMMS for the NCPDP 2017071 schema format upgrade. See the medication entries below for further information regarding the changes made to Clinical system as it relates to the NCPDO 2017101 schema format update.
- **Audit Trail*** – The Audit Trail has been updated to track the answer that a user gives when presented with a message indicating that the patient demographic information has been modified by other users. See Figure 1. When an audit event occurs, the Event column will display **Modify**; the Group column will display **Patient**; the Audit Trail Description will display **Patient demographics have been modified warning message**; and the patient's **Account ID** and the **Comments: User chose Yes/No** will be listed in the Metadata column.

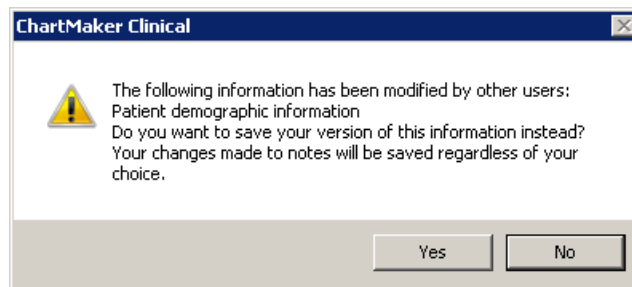


Figure 1 – ChartMaker Clinical – Demographic Change Warning

- **Audit Trail*** – The Audit Trail has been updated to track whenever a patient is enabled for API Access when signing a note (due to the **Auto-Enable API Access** preference being active). When an audit event occurs, the Event column will display **Authorize**; the Group column will display **Patient**; the Audit Trail Description will display **Patient auto-enabled for API Access. Please print or send an email with documentation.**; and the patient's **Account ID** will be listed in the Metadata column.
- **Audit Trail*** – The Audit Trail has been updated to track whenever a patient is enabled for API Access via the API Access dialog (**Chart > API Access**). When an audit event occurs, the Event column will display **Authorize**; the Group column will display **Patient**; the Audit Trail Description will display **Patient authorization instructions are now being printed to access the API, or Patient authorization email for API access sent to [email address], or Patient was authorized for API access pending printing or emailing instructions**; and the patient's **Account ID** will be listed in the Metadata column.
- **Audit Trail*** – The Audit Trail has been updated to track whenever API Access is disabled for a patient via the API Access dialog (**Chart > API Access**). When an audit event occurs, the Event column will display **Authorize**; the Group column will display **Patient**; the Audit Trail Description will display **API access was disabled for this patient**; and the patient's **Account ID** will be listed in the Metadata column.
- **Audit Trail*** – The Audit Trail has been updated to track whenever document export is suspended for a patient (checking the **Do not export on note, lab, and scan signing** option in the Patient Access dialog). When an audit event occurs, the Event column will display **Authorize**; the Group column will display **Patient**; the Audit Trail Description will display **Suspend document export to API and PatientPortal**; and the patient's **Account ID** will be listed in the Metadata column.
- **Audit Trail*** – The Audit Trail has been updated to track whenever document export is reinstated for a patient (unchecking the **Do not export on note, lab, and scan signing** option in the Patient Access dialog). When an audit event occurs, the Event column will display **Authorize**; the Group column will display **Patient**; the Audit Trail Description will display **Document export has been enabled to API and PatientPortal**; and the patient's **Account ID** will be listed in the Metadata column.

Added Features

- **Audit Trail*** – The Audit Trail has been updated to track whenever a patient is suspended for the PatientPortal by the practice via the Practice Admin area of the PatientPortal. When an audit event occurs, the Event column will display **Authorize**; the Group column will display **Patient**; the Audit Trail Description will display **PatientPortal access was disabled for this patient**; and the patient's **Account ID** will be listed in the Metadata column.
- **Facesheet – Patient Access*** – The Patient Access dialog has been updated so that **PatientPortal** is designated correctly and consistently throughout the dialog. See Figure 2. Anywhere the text has deviated from the proper designation has been updated to **PatientPortal**. In addition, the **Cancel** button, and cancellation functionality, has been removed from the Patient Access dialog, leaving **OK** as the only functional response to exiting the dialog.

Patient Access

PatientPortal account settings

Registration status:

Send an authorization email to the patient for PatientPortal registration.

or

Print authorization instructions for the patient to manually register on the PatientPortal.

API Access

Enable this patient for API access

Authentication code: N/A

Print this patient's authentication code.

Send an email to this patient with their authentication code.

Generate a new authentication code for this patient.

Do not export on note, lab and scan signing

Status Legend

- PatientPortal and API are not enabled
- PatientPortal enabled and API is not enabled or PatientPortal is not enabled and API is enabled
- PatientPortal pending and API not enabled
- PatientPortal is pending and API is enabled
- PatientPortal and API are enabled
- PatientPortal and API have note data not being sent (suspended)

[Help](#)

Figure 2 – Facesheet – Patient Access

Added Features (continued)

- **Immunization Registry – Configuration – NYSIIS** – The Registry Configuration dialog has been updated so that when the NYSIIS v 2.5.1 v1.5 format is selected, the Bi-directional Credentials section will be disabled and grayed out, since those credentials are no longer needed to send and receive bi-directional immunization information for NYSIIS. See Figure 3.

The Registry Configuration dialog box is titled "Registry Configuration" and features a close button (X) in the top right corner. At the top, the "Registry Format" is set to "NYSIIS v 2.5.1 v1.5" with a dropdown arrow and a note: "* Supports bi-directional functionality." Below this, the "Office Location and Site ID" section contains the instruction: "Enter the Site ID, provided by the immunization registry, for the office location it's assigned to." and a sub-instruction: "Please indicate one Default Site ID". A table lists office locations with columns for "Office Location", "Site ID", "Inventory ID", and "Default". The first entry is "STI Medical Practice (STI)" with Site ID "4321" and a checked "Default" box. Below the table are input fields for "Office Location:", "Site ID:", and "Inventory ID:", each with a search icon, and "Add" and "Delete" buttons. The "Bi-directional Credentials" section is grayed out and contains a table with columns for "Practice", "User ID", and "Password". Below it are input fields for "Practice:", "User ID:", and "Password:", each with a search icon, and "Add" and "Delete" buttons. The "Instructions for Sending Immunizations" section includes three checkboxes: "Send to registry environment:" (checked), "Do not send immunizations with a service date prior to:" (unchecked) with a date field set to "7/ 9/2019", and "Send historical immunizations" (checked). At the bottom right are "Save" and "Cancel" buttons.

Office Location	Site ID	Inventory ID	Default
STI Medical Practice (STI)	4321		<input checked="" type="checkbox"/>

Figure 3 – Registry Configuration – NYSIIS

- **Medications** – The ChartMaker Medical Suite has been updated to use the latest, NCPDP 2017071 schema, format for electronic prescribing of medications. This format change affects not only electronically prescribing of new medications (both controlled and non-controlled substances), but also renewing medications, cancelling prescriptions, as well as processing medication changes and refill requests. With these changes various updates have been made throughout the Clinical system that allows improved and easier workflows. Do note, however, as in the past, some workflows may continue to be limited for a given pharmacy until that participating pharmacy upgrades its software to the latest schema format. In those situations, the ChartMaker® Medical Suite will advise you on how to handle prescription renewals or refill requests. See the medication entries below for further information regarding the changes made to Clinical system as it relates to the NCPDO 2017101 schema format update.

Added Features (continued)

- Medications – SIG Field Update** – With the NCPDP 2017071 schema format changes, the SIG field, in the Prescribe Medication dialog, has been updated to accommodate up to 1000 characters. If the SIG text is longer than the visible in the SIG field, you can use the scroll buttons to preview the complete SIG text. See Figure 4. The Add'l SIG field, in the Prescribe Medication dialog, allows you to add additional text to the SIG up to the 1000-character limit, as well as the Predefined Text Maintenance screen accessed via the **Edit** button. Likewise, the various other areas of the system where you can view and enter SIG information has been updated to accommodate these changes: the **SIG** field in the Confirm Prescription dialog; the **SIG** column in the Controlled Substance Drug Log tab in the EPCS Auditing dialog; and the **Directions** field or text area in the Refill Response dialog, the General Change Response dialog, Cancel Prescription dialog, and the Prior Authorization Change Response dialog.

Do note, however, when confirming or sending a prescription, a SIG check will be performed, and the system will only allow you to send the larger, 1000-character SIG information to pharmacies that are updated to use the NCPDP 2017071 version 6.1 format. For those pharmacies using older, 10.6 version, format, the system will only allow a 140-character SIG text. Whenever either of these limits have been exceeded, based on the pharmacy selected, a warning message will appear outlining the issue and how to rectify to SIG text issue.

- Medications – Prescribe Medication** – With the NCPDP 2017071 schema format changes, for patients that are under the age of 18, the **height** and **weight** of the patient are required for sending medications electronically. This information will typically be populated in the Confirm Prescription screen from the information entered in the Vitals widget for the patient. However, if the information was not entered via the Vitals widget, the system will default **Ht/Wt:** into the **Notes to Pharmacist** field, allowing you to enter a reason why the height and weight could not be obtained for the patient. See Figure 4. Do note, that this field will also be editable in the Confirm Prescription dialog, allowing you to append or enter the reason, if needed. However, if a reason is not entered, once the **Confirm and Send** button is clicked, or the **Ready to sign** option is checked, a warning message will appear, and you will not be able to confirm the medication until one is entered. See Figure 5.

Prescribe Medication

digoxin 125 mcg tablet (Rx, Generic) Inactive Meds Medication Info

PDMP queried PDMP Report Medication History Consent: Yes Medication Eligibility Medication History

Prescription

Route: oral

Medication: digoxin 125 mcg tablet

Action: Take

Dose: 1 Dose Calculator

Dose Units: tablet

Frequency: Every day

Dispense: 30 Tablet

Add'l SIG: 1000 characters,*** Edit...

Refills: 4 Substitution OK

Days Supply: 30 Max Dose

Notes to Pharmacist: Ht/Wt: Clear

Formulary

Current Drug Selection

Payer	Medication	Status	Coverage	Copay	Copay Info
PBMF-PLANABX	digoxin 125 mcg tablet	On Formulary	N/A	N/A	
CERT PBM-B-PLANA4	digoxin 125 mcg tablet	On Preferred - 1	N/A	View	Retail: 20%, 30d, ... Mail: \$5+30%, 90d, ...
PBMF-PLANX	digoxin 125 mcg tablet	On Preferred - 1	N/A	View	Tier 1/3

Drug Alternatives (* = Payer Specified)

Payer	Medication	Status	Coverage	Copay	Copay Info
CERT PBM-B-PLANA4	digitalis leaf 100 mg tablet	On Preferred - 2	N/A	N/A	
CERT PBM-B-PLANA4	digitalis leaf 30 mg tablet	On Preferred - 2	N/A	N/A	
CERT PBM-B-PLANA4	gitalin 0.5 mg tablet	On Preferred - 2	N/A	N/A	

Payer: PBMF-PLANABX

Transmission: E-Prescribe Diagnosis Administered during visit

Sample Lot # Expiration Date 7/11/2019 Print patient prescription savings materials

SIG: Take 1 tablet orally Every day ***With the update to the new NCPDP 2017071 schema format, the SIG field can now hold up to 1000 characters,***

Started: 7/11/2019 Initial order Created outside of Clinical

Ended: 7/11/2019

Earliest Fill Date: 7/11/2019

ePA is not required Override?

Cancel Back Next

Figure 4 – Prescribe Medication

Added Features (continued)

Medications – Prescribe Medication (continued)

The screenshot displays the 'Confirm Prescription' window. The 'Medication' section includes fields for Medication (digoxin 125 mcg tablet), Start text (Take), Route (oral), Refills (4), Date written (07/11/2019), Form (125 mcg), Dose (1 tablet), Days Supply (30), Substitution OK (Yes), Dispense (30 Tablet), Frequency (Every day), and SIG (Take 1 tablet orally Every day). A 'Notes to Pharmacist' field contains 'Ht/Wt:'. The 'Prescriber' section shows Davidon, Main, with DEA Number AD55018 and address 2700 Van Eagleville. The 'Prescription' section shows Destination E-Prescribe and Pharmacy CA Pharmacy 10.6MU. A 'Vitals Missing' dialog box is open, stating: 'The patient's height and weight are required to send this prescription. Please provide the reason why this information cannot be obtained in the Notes to Pharmacist field above. Expected format: 'Ht/Wt:reason''. The dialog has an 'OK' button.

Figure 5 – Confirm Prescription

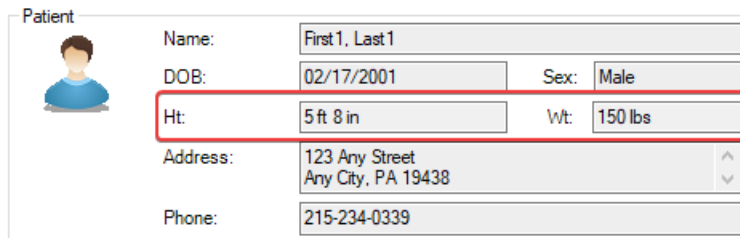
- **Medications – Cancel Prescriptions** – The To-Do List message text for cancel responses has been updated to include the Pharmacy information, Patient Address, Patient Communication (Phone) Numbers, Patient Gender, Patient Date of Birth, and Prescriber First and Last Name. See Figure 6.

The screenshot shows a To-Do List entry with the following text: 'The cancel request for Advil was approved on May 24, 2019 07:36 AM by Bannockburn Pharmacy. Patient Details Name: Devereaux, Margaret Adella Gender: F DOB: 11/1/1997 Address: 27-B Heald St Pepperell, MA. 01463 Phone: 617-688-4642 Prescriber: Ganguly, Sanjana No medication has been dispensed for this prescription.'

Figure 6 – To-Do List – Cancel Response

Added Features (continued)

- **Medications – Confirm Prescription**– The Patient section of the Confirm Prescription dialog has been updated to display the patient’s height and weight. See Figure 7. The information in the **Ht** and **Wt** fields will populate the information entered in the Vitals widget for the patient and will show the latest values entered for each. If no height is entered via a Vitals widget, the Ht field in the Confirm Prescription field will be blank. If no weight is entered via a Vitals widget, the Wt field in the Confirm Prescription field will be blank. If either of these fields are blank, and the patient is less than 18 years old, the Note to Pharmacist field will contain a **Ht/Wt:** allowing you to enter a reason why this information was not obtainable. If no reason is entered, you will not be allowed to send the prescription. See the entry above for further details.

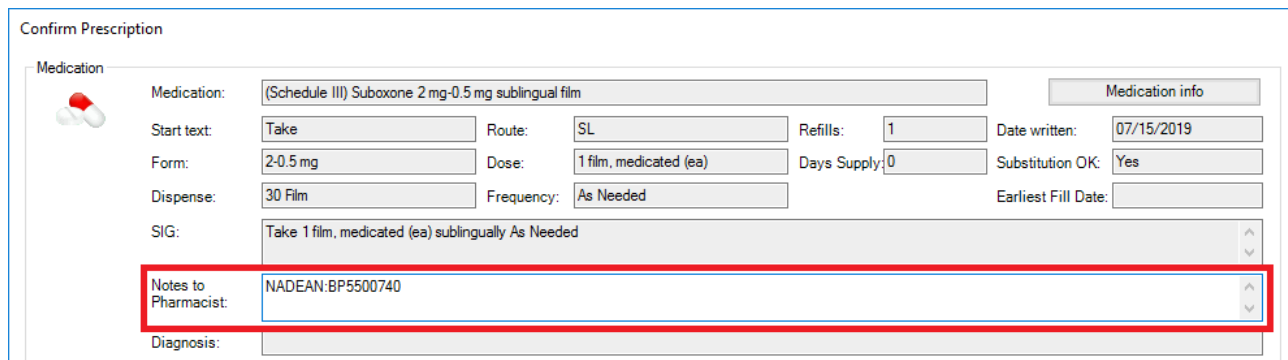


Patient

Name:	First1, Last1		
DOB:	02/17/2001	Sex:	Male
Ht:	5 ft 8 in	Wt:	150 lbs
Address:	123 Any Street Any City, PA 19438		
Phone:	215-234-0339		

Figure 7 – Confirm Prescription – Patient – Height/Weight Fields

- **Medications – Confirm Prescription**– The Notes to Pharmacist field, in the Confirm Prescription dialog, has been updated so when a pharmacy that is still using the older 10.6 version format is selected, you can enter the NADEA Number for those medications (buprenorphine HCl, buprenorphine-naloxone, Suboxone, Subutex, Zubsolv, etc.) that require this number when prescribing. The NADEA Number should be entered using the following format: **NADEAN:XXXXXXXX**, where XXXXXXXXX is the NADEA Number. See Figure 8. If the NADEA Number is not entered for those applicable medications when a 10.6 pharmacy is selected, and you click the **Ready to sign** option, a warning message will appear, indicating this number needs to be entered in the Notes to Pharmacy field, and you will not be able to continue sending the medication until this information is entered. See Figure 9.

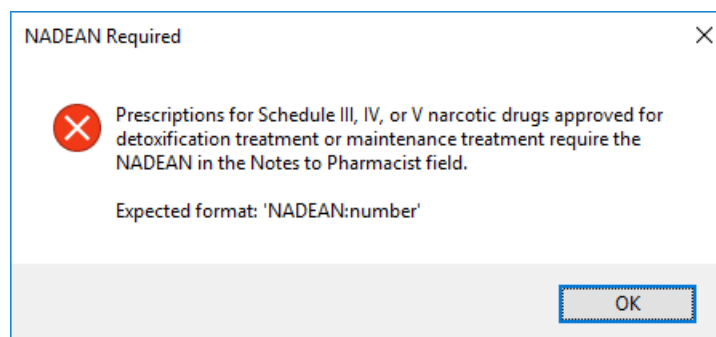


Confirm Prescription

Medication

Medication:	(Schedule III) Suboxone 2 mg-0.5 mg sublingual film			Medication info			
Start text:	Take	Route:	SL	Refills:	1	Date written:	07/15/2019
Form:	2-0.5 mg	Dose:	1 film, medicated (ea)	Days Supply:	0	Substitution OK:	Yes
Dispense:	30 Film	Frequency:	As Needed	Earliest Fill Date:			
SIG:	Take 1 film, medicated (ea) sublingually As Needed						
Notes to Pharmacist:	NADEAN:BP5500740						
Diagnosis:							

Figure 8 – Confirm Prescription – Notes to Pharmacist



NADEAN Required

Prescriptions for Schedule III, IV, or V narcotic drugs approved for detoxification treatment or maintenance treatment require the NADEAN in the Notes to Pharmacist field.

Expected format: 'NADEAN:number'

OK

Figure 9 – Confirm Prescription – NADEAN Required

Added Features (continued)

- **Medications – Confirm Prescription**– The Confirm Prescription dialog has been updated so the green checkmark indicator that appears next to the **Print patient prescriptions savings materials** option, whenever there are any prescription savings materials available to print for the medication being prescribed, is now clickable, thereby allowing you to preview the prescriptions savings materials that are available. See Figure 10.

Confirm Prescription

Medication

Medication: Medication info

Start text: Route: Refills: Date written:

Form: Dose: Days Supply: Substitution OK:

Dispense: Frequency: Earliest Fill Date:

SIG:

Notes to Pharmacist:

Diagnosis:

For internal use only

Sample lot #: Sample exp date: Administered during visit Initial order created outside of Clinical Print patient prescription savings material

Figure 10 – Confirm Prescription

When the green checkmark indicator is clicked, a Patient Savings Materials dialog will appear displaying the corresponding savings materials for the medication. See Figure 11. After viewing the materials, you can click the **Close** button.

Patient Savings Materials

ScriptGuide® information for your health®

For: Four Old	Your Rx has been sent to:
Date: June 28, 2019	CA Pharmacy 10.8MU
Message ID: 10099613-845	85432 Cabernet Turn
	Sonoma, CA 95478
	(707) 210-7071

You've been prescribed **Livastat**

Your doctor has chosen **LIVASTAT** to treat your high cholesterol. It's the first medication designed to lower your cholesterol and prevent plaque buildup in your arteries without muscle aches and pains associated with traditional cholesterol lowering medications.

It is important to fill your prescription of Livastat today!

Close

Figure 11 – Patient Savings Materials

Added Features (continued)

- **Medications – Phone Numbers** – The system has been updated so that patient phone numbers are no longer required to send e-prescriptions, process change and refill requests, or when canceling prescriptions. With the update to the NCPDP 2017071 schema format, patient phone numbers are no longer required, however, when available, they will need to adhere to the formatting requirements.
- **Medications – Phone Number Extensions** – The system has been updated to display phone extensions between brackets [] throughout the various medication screens (Confirm Prescription, Send E-Prescriptions, General Change Response, Cancel Prescription, Prescriber Authorization Change Response, and Refill Response) for providers, supervisors, and patients. See Figure 12. These phone extensions will be sent as discrete data, separate from the phone number, per NCPDP2017 requirements.

The screenshot shows the 'Confirm Prescription' form with the following data:

Section	Field	Value
Medication	Medication	PROzac 40 mg capsule
	Start text	Take
	Route	oral
	Refills	3
	Date written	07/12/2019
	Form	40 mg
	Dose	1 capsule
	Days Supply	30
	Substitution OK	Yes
	Dispense	30 Capsule
Frequency	Every day	
Earliest Fill Date		
SIG:		Take 1 capsule orally Every day
Notes to Pharmacist:		
Diagnosis:		
For internal use only		
Sample lot #:	Sample exp date:	
		<input type="checkbox"/> Administered during visit
		<input type="checkbox"/> Initial order created outside of Clinical
		<input checked="" type="checkbox"/> Print patient prescription savings materials
Prescriber	Prescriber:	Smith, Doctor MD
	Location:	Main
	Address:	4312 W Genesee St
	Phone:	315-488-1518 [1232]
Patient	Name:	Doe, John
	DOB:	04/10/2002
	Sex:	Male
	Ht:	6 ft 2 in
	Wt:	190 lbs
	Address:	238 Main Street
Phone:	315-488-1518 [2123]	
Prescription	Destination:	E-Prescribe
	Pharmacy:	
		<input type="checkbox"/> Ready to sign
		Confirm and Send
		< Revise
		Cancel

Figure 12 – Confirm Prescription

- **Medications – Prescription Layout Tool** – The Prescription Layout Editor has updated with a **NADEAN** tag that allows you to include the provider's NADEA Number in the printed prescription. The NADEA Number will be populated from the provider location area in the Prescriber Setup dialog.
- **Medications – Process Change Request** – After you have upgraded to the latest version of CMMS (fv6.4.0.306), and thereby have updated to the NCPDP 2017071 schema format changes for e-prescribing, any legacy Change Requests, from a 10.6 pharmacy, that were not processed prior to upgrading, will no longer be able to be processed. When clicking the Process Change Request option from the facesheet, an Outdated Change Request message will appear, allowing you to delete the change request, if desired. See Figure 13.

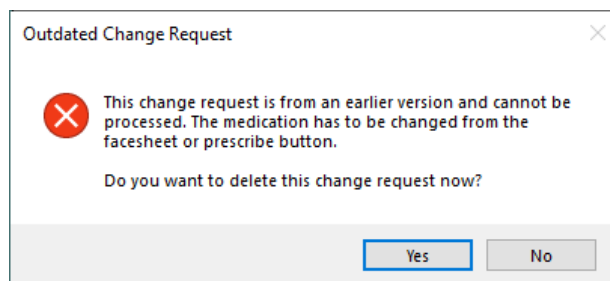


Figure 13 – Outdated Change Request

Added Features (continued)

- Medications – Process Change Request – General Change Response** – With the NCPDP 2017071 schema format changes, the system has been updated to process new change request message types for Drug Use Evaluation (D), Out of Stock (OS), and Script Clarification (S). Likewise, the change request message types of Generic (G) and Therapeutic (T) have been updated to the NCPDP 2017071 schema format and workflow. With these changes, the Change Reason field has been updated so that if a change reason is not sent with the request, then the field will show the message code text in this field. See Figure 14.
- Medications – Process Change Request – General Change Response** – The Prescriber section of the General Change Response dialog has been updated to allow you to change the prescriber's **Location**, if needed, when the original prescriber is processing the change request. See Figure 14. If a prescriber other than the original prescriber (i.e., a prescribing agent) is processing the change request, the Location field will default to the location included in the request, and the field will be locked, and you will not be able to change the location.

General Change Response

Change Reason
The patient's pharmacy has requested a therapeutic change to this prescription.

Medication Requested
Select a medication from the dropdown below. Changes from the originally prescribed medication will be highlighted.
[Original Medication] (Schedule II) oxyCODONE 5 mg/5 mL oral solution

Reason: The patient's pharmacy has requested a change to this prescription.

Quantity: 30 solution, oral Days Supply: 30 Substitution: Yes

Directions: Take 1 solution, oral orally Every day Notes to Pharmacist:

Diagnosis:

Written Date: 03/15/2019 Earliest Fill Date: 3/15/2019 Refills: 0 Medication info

Prescriber
 Prescriber: Puppo, Anthony
 Location: From Change Request
 DEA Number: From Change Request
 Address: Main Office
 Location Two
 Phone: 215-237-8244
 Fax: 215-237-4422

Patient
 Name: Whiteside, Kara
 DOB: 10/11/1952 Sex: Female
 Ht: Wt:
 Address: 23230 Seaport Akron, OH 44306
 Phone: 330-554-7754

Pharmacy
 Name: Bannockburn Pharmacy
 Address: 6798 Pyle Rd Bethesda MD, 20817
 Phone: 3016442418
 Fax: 3016442566

Denied
Denial Reason:

Response
Written Date: 03/19/2019
Comments: Edit...

By completing the two-factor authentication protocol at this time, you are legally signing the prescription(s) and authorizing the transmission of the above information to the pharmacy for dispensing. The two-factor authentication protocol may only be completed by the provider whose name and DEA registration number appear above.

Ready to sign

Figure 14 – General Change Response – Prescriber Location

- Medications – Process Change Request – General Change Response** – The Response section of the General Change Response dialog has been updated with a **Prescribing Agent** field whenever a prescriber other than the original prescriber is processing the change request. See Figure 15. The Prescriber Agent field will contain the user's name who is currently logged in and processing the change request. Do note, that prescribing agents cannot prescribe, or process change requests, for controlled substances. In those instances when a prescribing agent is processing a change request, the **Ready to sign** and **Sign and Approve** options will be disabled.

Response
Written Date: 04/02/2019
Comments: Edit...
Prescribing Agent: Puppo1, Anthony1

Figure 15 – General Change Response – Prescriber Agent

Added Features (continued)

- Medications – Process Change Request – General Change Response** – The Prescriber, Patient, and Pharmacy sections of the General Change Response dialog have been updated to display all the communication numbers and addresses (phone numbers, beeper numbers, fax numbers, email address, and direct address) included in the change request. See Figure 16.

The screenshot shows the 'General Change Response' dialog with three main sections: Prescriber, Patient, and Pharmacy. Each section has a red box highlighting the contact information fields.

Prescriber:
 Name: Provider, Provider
 Location: From Change Request
 Address: 2700 Van Buren Ave, Philadelphia, PA 19107
 Primary Phone: 707-944-2142 [4221]
 Fax: 707-944-2121
 Email: Marguerite.Pimpernel@MediStar.com

Patient:
 Name: Bergamel, Solomon
 DOB: 03/21/2011 Sex: Male
 Ht: 52 in Wt: 123.75 lb
 Address: Philadelphia, PA 19146
 Primary Phone: 707-944-2142 [4221]
 Fax: 707-944-2121
 Email: Marguerite.Pimpernel@MediStar.com

Pharmacy:
 Name: Bannockburn Pharmacy
 Address: 6798 Pyle Rd, Bethesda MD, 20817
 Primary Phone: 707-944-2142 [4221]
 Fax: 707-944-2121
 Email: Marguerite.Pimpernel@MediStar.com

Denial:
 Denial Reason: [Dropdown]
 Response: [Dropdown]
 Written Date: 05/10/2019
 Comments: [Text Area] [Edit...]

Figure 16 – General Change Response – Communication Numbers

- Medications – Process Change Request – General Change Response** – The General Change Response dialog has been updated to provide a drug interaction check that will trigger when the **Approve** button is clicked for non-controlled medications, or when the **Ready to Sign** option is checked for controlled medications. If there is an interaction for the medication you are processing, an Interactions Present dialog will appear outlining the various interactions. See Figure 17. As when prescribing a medication, you can click the **Revise** button to take you back to the previous screen to modify the medication, or you can enter a **Comment** and then click the **Proceed Anyway** button. When entering a comment and proceeding, the drug interaction comment will appear in the auto-drug log.

The screenshot shows the 'General Change Response' dialog with a 'Medication Requested' section. The medication is 'phenzeline 15 mg Tab'. A 'Reactions' dialog box is open, showing a drug interaction between 'Fluoxetine' and 'SELECTED MAOIS/SEROTONIN REUPTAKE INHIBITORS; SNRIS'. The interaction is described as 'Concurrent use or swi'. The dialog also includes a 'Comments' field and an 'Edit...' button. Below the dialog, there is a 'Conditions of Use' section and a 'Bibliographic information' section. The 'Response' section shows a 'Written Date' of 04/22/2019 and a 'Comments' field. At the bottom, there are buttons for 'Ready to sign' and 'Approve'.

Medication Requested:
 Select a medication from the dropdown below. Changes from the originally prescribed medication will be highlighted.
 phenzeline 15 mg Tab [Dropdown] [Other...]

Reactions:
 Interactions: Present(Active Ingredients only listed)

Drugs	Interaction
Fluoxetine	SELECTED MAOIS/SEROTONIN REUPTAKE INHIBITORS; SNRIS

 Concurrent use or swi
 Comments: [Text Area] [Edit...]

Conditions of Use:
 The information in this database is intended to supplement, not substitute for, the expertise and judgment of you, the healthcare professional. The information is not intended to cover all possible uses, directions, precautions, drug interactions or adverse effects, nor should it be construed to indicate that use of a particular drug is safe, appropriate or effective for your patient. Interactions listed here are based solely on a formulation's active ingredients.

Bibliographic information:
 To review Bibliographic information, double click on the interaction and the Drug Monograph dialog will display.

Response:
 Written Date: 04/22/2019
 Comments: [Text Area] [Edit...]

Ready to sign

Figure 17 – General Change Response – Interactions Present

Added Features (continued)

- **Medications – Process Change Request – General Change Response** – The General Change Response dialog has been updated to perform a NADEAN check prior to processing requests for medications that require a NEDEAN number (buprenorphine HCl, buprenorphine-naloxone, Suboxone, Subutex, Zubsolv, etc.). When processing a request from a pharmacy using the latest 6.1 version format, and you click Ready to Sign option, the system will check to see if the Location selected for the prescribing provider has a NADEA Number configured in the Prescriber Setup dialog. If a NADEA Number is not configured for the selected location, the system will generate a NADEAN Required warning message outlining the issue, and you will not be allowed to process the change request until the issue is rectified. See Figure 18.

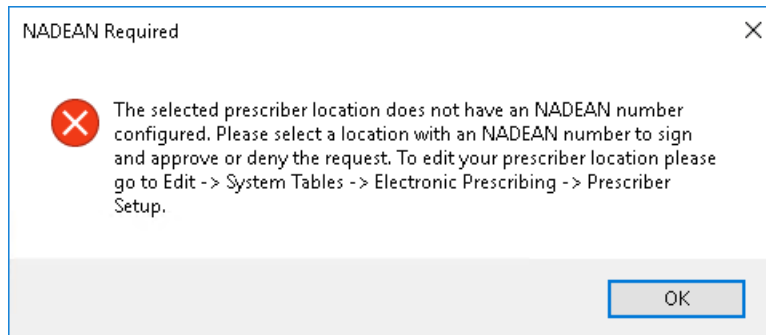


Figure 18 – NADEAD Required – 6.1 Pharmacy

When processing a change request from a pharmacy that is still using the older 10.6 version format, the system will check to see if the NADEA Number was entered in the Notes to Pharmacist field. If the NADEA Number is not in this field in the proper format, the system will generate a NADEAN Required warning message outlining the issue, and you will not be allowed to process the request until the issue is rectified. See Figure 19.

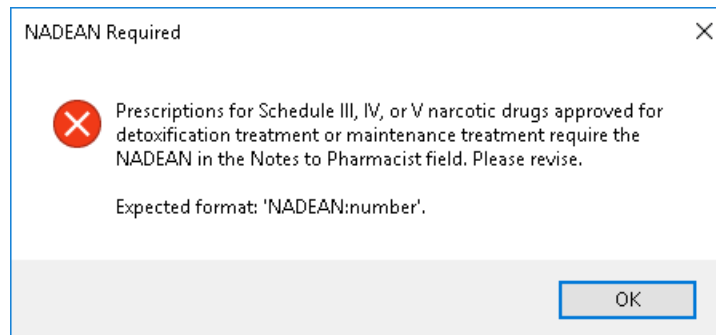


Figure 19 – NADEAN Required – 10.6 Pharmacy

Added Features (continued)

- **Medications – Process Change Request – Prescriber Authorization Change Response** – With the NCPDP 2017071 schema format changes, the system has been updated to process new change request message types for Prescriber Authorization (U), and Prior Authorization (P). When a Prescriber Authorization message type is received, it will contain sub-codes that indicate what information needs to be confirmed or is missing and has prompted the request. The Change Reason field, and to some extent the new Prescribing Credentials section, will outline what information needs confirmation or is missing. See Figure 20. To approve the request, you can then click the **Change Credentials** button to access the Prescribing Credentials dialog to configure or confirm the information.

Prescriber Authorization Change Response

Change Reason
The Pharmacy has requested that you confirm your credentials for the following: Patient's Lock-In Prescriber Effective Date.

Medication
Name: tamoxifen 10 mg tablet
Quantity: 60 Tablet
Days Supply: 15
Directions: Take 1 tablet orally 4 times a day
Refills: 0
Substitutions: No
Notes to Pharmacy:

Pharmacy
Name: Bannockburn Pharmacy
Address: 6798 Pyle Rd
Bethesda MD, 20817
Phone: 3016442418
Fax: 3016442566

Prescriber
Prescriber: Midlevel, Sanjana
Location: From Change Request
DEA Number: BS5502403
Address: 2700 Van Buren Ave
Eagleville, PA 19403
Phone: 610-650-9700

Patient
Name: Patient, U-pres auth
DOB: 01/01/2000 Sex: Female
Ht: Wt:
Address: 1400 Kriebel Mill Rd
Eagleville, PA 19403
Phone: 215-555-5555

Prescribing Credentials
Patient's Lock-In Prescriber Effective Date: Not Populated

Denied
Denial Reason:

Response
Written Date: 03/26/2019
Comments: Edit...

Approved
Comments: Only items that could be validated have been returned.

Ready to sign Approve Deny Cancel

Figure 20 – Prescriber Authorization Change Response

Added Features (continued)

Medications – Process Change Request – Prescriber Authorization Change Response (continued)

When in Prescribing Credentials dialog, the applicable fields that require information or validation will become active. See Figure 21. Do note, that you do not need to fill out all the information requested by the requested sub-codes to approve the request. However, the NPI must always be populated and will be provided based on the NPI in the change request message. In addition, at least one of the requested pieces of data must be returned.

Prescribing Credentials

Practice Location Credentials

Practice Location: [dropdown] State License Registration Status: [dropdown]

State License: [dropdown] NADEAN Number: [text]

Supervisor: [dropdown] DEA License: [text]

NPI: [text]

Provider Credentials

Taxonomy Code: [text] Prescription Benefit Plan Effective Date: [calendar] 03/26/2019

Patient's Lock-in Prescriber Effective Date: [calendar] 03/26/2019

OK Cancel

Figure 21 – Prescriber Authorization Change Response

When the pharmacy sends an unsupported sub-code for information that we do not gather, the Change Reason field and Prescribing Credentials area will outline this information, and you will have to Deny the request, and then follow-up with the pharmacy, as needed. See Figure 22.

Change Reason

The Pharmacy has requested clarification on information we do not gather, including

Medication

Name: Tobramycin and Dexamethasone Ophthalmic Suspension

Quantity: 60 Tablet

Days Supply:

Directions: Take 1 tablet orally Every 4 hours

Refills: 1

Substitutions: No

Notes to Pharmacy:

Medication Info

Prescriber

Prescriber: Ganguly, Sanjana

Location: From Change Request

DEA Number: BS5501184

Address: 2700 Van Buren Ave
Eagleville, PA 19403

Phone: 610-650-9700

Fax: 610-650-9275

Prescribing Credentials

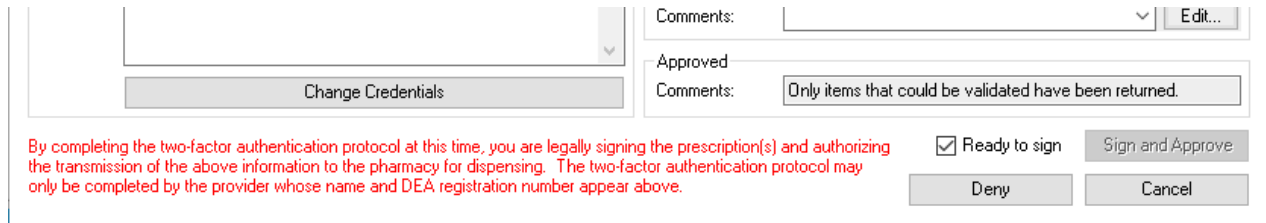
The pharmacy has requested clarification on information that we do not gather. Please deny this request and follow up with the pharmacy.

Change Credentials

Figure 22 – Prescriber Authorization Change Response

Added Features (continued)

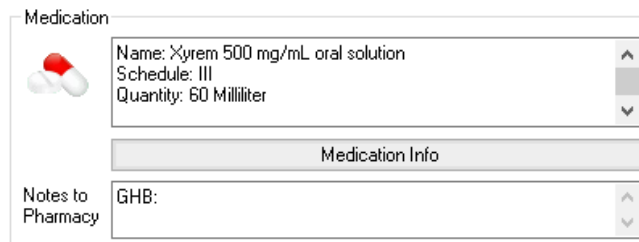
- **Medications – Process Change Request – Prescriber Authorization Change Response** – The Prescriber Authorization Change Response dialog has been updated to allow you to process change requests for controlled substances. You will have the ability to validate the prescribe credentials via the **Change Credentials** button, however, you can only use existing credentials, and when selecting a Practice Location for a location that is EPCS enabled, the information will populate, and you will *not* be able to manually edit any of the fields. Do note, only EPCS enabled locations will be available in the Practice Location drop-down list when processing a change request for controlled substances. Likewise, you will need to perform two-factor authentication by clicking the **Ready to sign** option, and then clicking the **Sign and Approve** button. See Figure 23. Once the **Ready to sign** option is clicked, the system will then go through the various EPCS checks, similar to those performed when confirming a controlled substance in the Confirm Prescriptions dialog, and if any checks fail, a warning message will be generated, and depending upon the message you may have to deny the request.



The screenshot shows a software interface for processing a change request. On the left, there is a 'Change Credentials' button. To its right, there is a 'Comments' field with a dropdown arrow and an 'Edit...' button. Below this is an 'Approved' section with a 'Comments' field containing the text 'Only items that could be validated have been returned.' At the bottom, there is a 'Ready to sign' checkbox which is checked, and a 'Sign and Approve' button. To the left of these buttons is a red warning message: 'By completing the two-factor authentication protocol at this time, you are legally signing the prescription(s) and authorizing the transmission of the above information to the pharmacy for dispensing. The two-factor authentication protocol may only be completed by the provider whose name and DEA registration number appear above.' Below the warning are 'Deny' and 'Cancel' buttons.

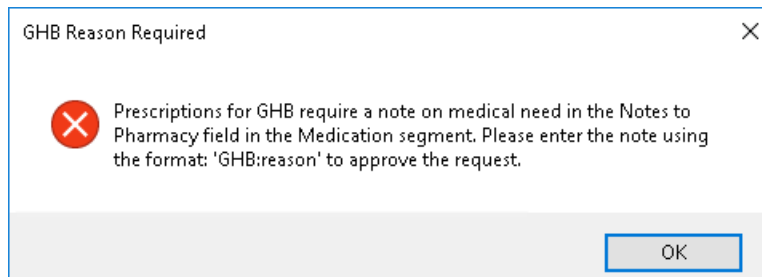
Figure 23 – Prescriber Authorization Change Response – Controlled Substances

Additionally, when a change request for a GHB medication is being processed, the Medication section will contain a Notes to Pharmacy field with a GHB: prepopulated, allowing you enter the GHB reason. See Figure 24. If a reason is not entered, a GHB Reason Required message will be generated when click the **Ready to sign** option, and you will not be able to continue to approve the request until the reason is entered. See Figure 25.



The screenshot shows the 'Medication' section of the software interface. It includes a 'Medication' header, a red pill icon, and a text box containing 'Name: Xyrem 500 mg/mL oral solution', 'Schedule: III', and 'Quantity: 60 Milliliter'. Below this is a 'Medication Info' button. At the bottom, there is a 'Notes to Pharmacy' field with 'GHB:' prepopulated.

Figure 24 – Prescriber Authorization Change Response – Notes to Pharmacy



The screenshot shows an error message dialog box titled 'GHB Reason Required'. It features a red 'X' icon and the following text: 'Prescriptions for GHB require a note on medical need in the Notes to Pharmacy field in the Medication segment. Please enter the note using the format: 'GHB:reason' to approve the request.' An 'OK' button is located at the bottom right of the dialog.

Figure 25 – Prescriber Authorization Change Response – GHB Reason Required

Added Features (continued)

- **Medications – Process Change Request – Prescriber Authorization Change Response** – The Prescriber Authorization Change Response dialog has been updated to provide a drug interaction check that will trigger when the **Approve** button is clicked for non-controlled medications, or when the **Ready to Sign** option is checked for controlled medications. If there is an interaction for the medication you are processing, an Interactions Present dialog will appear outlining the various interactions. See Figure 26. As when prescribing a medication, you can click the **Revise** button to take you back to the previous screen to modify the medication, or you can enter a **Comment** and then click the **Proceed Anyway** button. When entering a comment and proceeding, the drug interaction comment will appear in the auto-drug log.

The screenshot shows a software window titled "Prescriber Authorization Change Response". The main area contains a "Change Reason" dropdown with the text "The Pharmacy has requested that you confirm your credentials for the following: DEA Number and Prescription Benefit Enrollment Date." Below this are fields for "Medication" (Name: Klonopin 0.5 mg tablet) and "Pharmacy" (Name: Bannockburn Pharmacy). A modal dialog titled "Interactions Present (Active Ingredients only listed)" is overlaid on top. It features a table with the following content:

Drugs	Interaction	Clinical Effects
Klonopin	clonazepam	Klonopin Allergy Alert - Klonopin may contain clonazepam, which may cause an allergic reaction.

Below the table is a "Comments:" field with a dropdown and an "Edit..." button. A "Proceed Anyway" button and a "Revise" button are at the bottom of the modal. The background window also has a "Change Credentials" button and a "Comments:" field with an "Edit..." button. At the bottom of the window, there is a "Ready to sign" checkbox (checked), a "Sign and Approve" button, and "Deny" and "Cancel" buttons. A red warning message is displayed at the bottom left:

By completing the two-factor authentication protocol at this time, you are legally signing the prescription(s) and authorizing the transmission of the above information to the pharmacy for dispensing. The two-factor authentication protocol may only be completed by the provider whose name and DEA registration number appear above.

Figure 26 – Prescriber Authorization Change Response – Interactions Present

Added Features (continued)

- **Medications – Process Change Request – Prescriber Authorization Change Response** – The Prescriber, Patient, and Pharmacy sections of the Prescriber Authorization Change Response dialog have been updated to display all the communication numbers and addresses (phone numbers, beeper numbers, fax numbers, email address, and direct address) included in the change request. See Figure 27.

The screenshot shows a dialog box titled "Prior Authorization Change Response" with a close button (X) in the top right corner. It is divided into four main sections: Medication, Pharmacy, Prescriber, and Patient. Each section contains a list of details, with communication numbers and addresses highlighted in red.

Section	Field	Value
Medication	Name	Brilinta 60 mg tablet
	Quantity	60 Tablet
	Days Supply	60
	Directions	Take 1 tablet orally Every day
	Refills	1
Pharmacy	Name	Bannockburn Pharmacy
	Address	6798 Pyle Rd Bethesda, MD 20817
	Primary Phone	301-644-2418
	Work Phone	707-944-8888
	Fax	301-644-2566
Prescriber	DEA Number	BS5502388
	Address	2700 Van Buren Ave Farmingdale, NY 11737
	Phone	610-650-9700
	Fax	610-650-9275
	Location	From Change Request
Patient	Name	Bergamel, Solomon
	DOB	03/21/2011
	Sex	Male
	Ht	52 in
	Wt	123.75 lb

Figure 27 – Prescriber Authorization Change Response – Communication Numbers

- **Medications – Process Change Request – Prescriber Authorization Change Response** – The system has been updated so that only the original prescriber can approve the change request in the Prescriber Authorization Change Response dialog. Whenever a prescribing agent, or a prescriber other than the original prescriber, is logged in to Clinical and tries to process the change request, once they click the **Approve** button, or **Ready to sign** option, the system will generate an Invalid Prescriber message indicating the issue, and you will not be able to continue with the approval. See Figure 28.

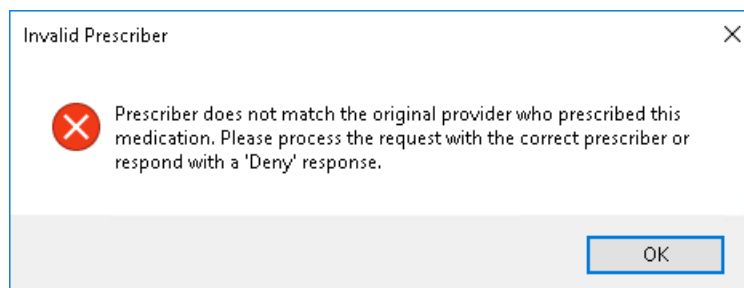


Figure 28 – Prescriber Authorization Change Response – Invalid Prescriber

Added Features (continued)

- **Medications – Process Refill Request** – After you have upgraded to the latest version of CMMS (fv6.4.0.306), and thereby have updated to the NCPDP 2017071 schema format changes for e-prescribing, any legacy Refill Requests, from a 10.6 pharmacy, that were not processed prior to upgrading, will no longer be able to be processed. When clicking the Process Refill Request option from the facesheet, an Outdated Change Request message will appear, allowing you to delete the change request, if desired. See Figure 29.

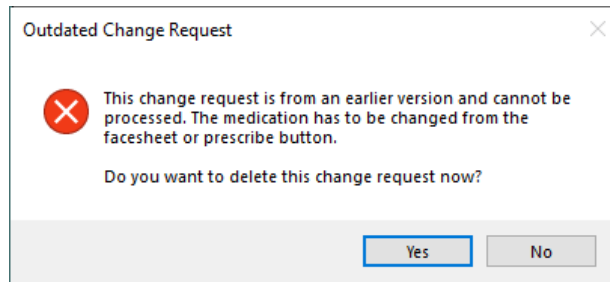


Figure 29 – Outdated Change Request

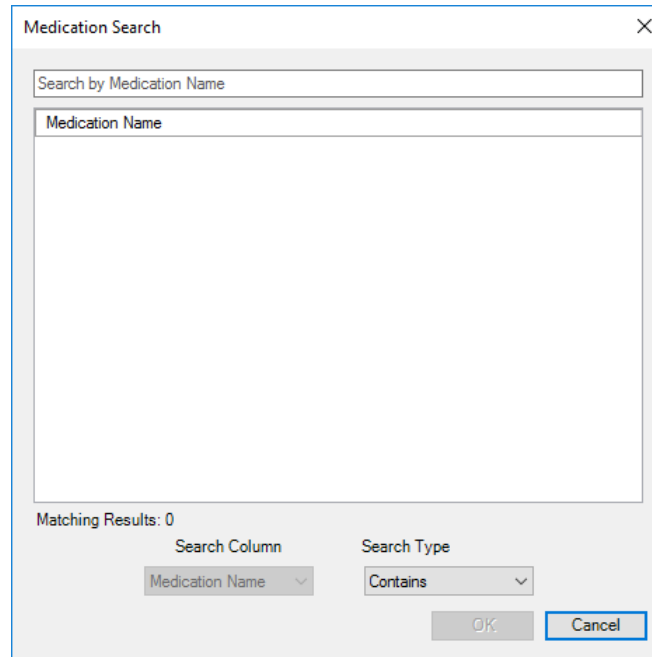
- **Medications – Process Refill Request – Refill Response** – With the NCPDP 2017071 schema format changes, the Pharmacy Dispensed Medication section of the Refill Response dialog has been updated to allow you to edit **Directions, Notes, Dispense unit, Quantity, Substitution OK, Days supply, Diagnosis, and Earliest Fill Date** (for controlled substances), as well as to replace the medication with a different medication via the **Replace** button. See Figure 30. Do note, however, when receiving a refill request for a controlled substance from a pharmacy that is still using the older 10.6 version format, these fields will be read-only, and the Replace button will be disabled and grayed out.

Figure 30 – Refill Response

When the Replace button is clicked, a Medication Search dialog will appear, allowing you to search for the medication you want to replace the original medication with. See Figure 31. Once the medication has been located, highlight that medication, and then click the **OK** button.

Added Features (continued)

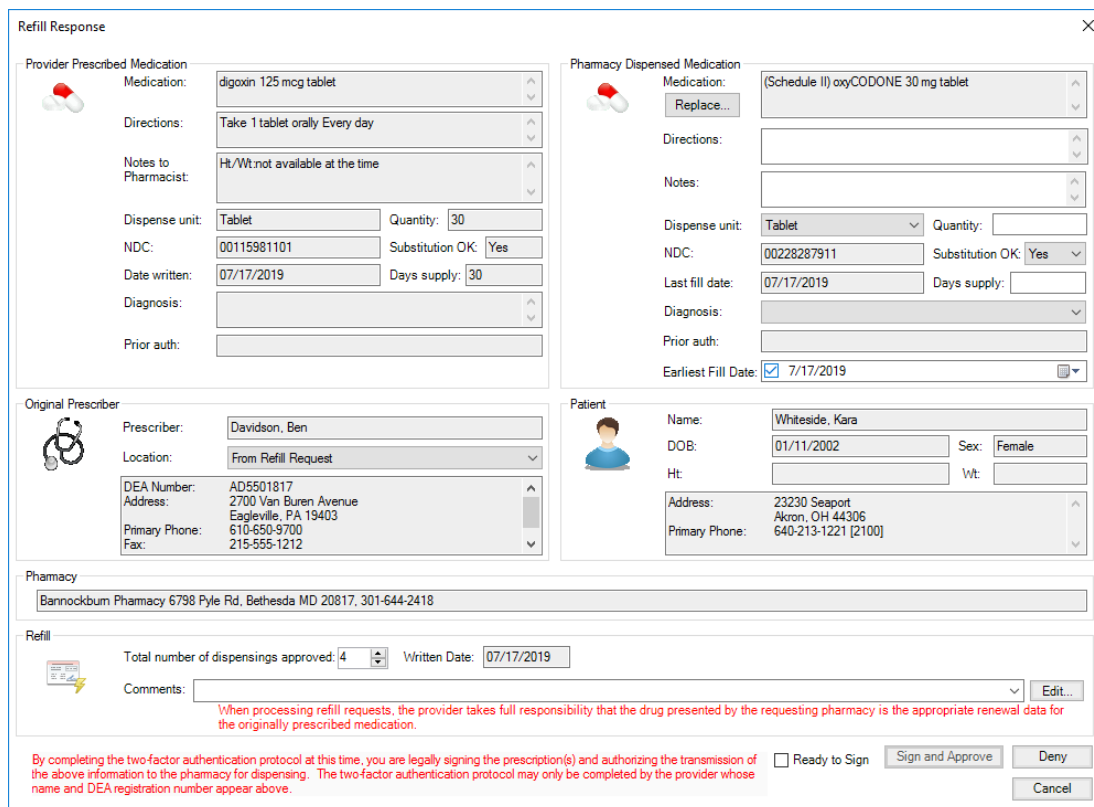
Medications – Process Refill Request – Refill Response (continued)



The Medication Search dialog box features a search input field labeled "Search by Medication Name" and a large list area for "Medication Name". Below the list, it displays "Matching Results: 0". At the bottom, there are two dropdown menus: "Search Column" set to "Medication Name" and "Search Type" set to "Contains". "OK" and "Cancel" buttons are located at the bottom right.

Figure 31 – Refill Response – Medication Search

The new medication will then display in the Medication field, and you can enter or select the **Directions**, **Notes**, **Dispense unit**, **Quantity**, **Substitution OK**, **Days supply**, **Diagnosis**, and **Earliest Fill Date** (for controlled substances), as needed. See Figure 32.



The Refill Response dialog box is divided into several sections. The top left section, "Provider Prescribed Medication", shows "digoxin 125 mcg tablet" with directions "Take 1 tablet orally Every day" and notes "Ht/Wt: not available at the time". The top right section, "Pharmacy Dispensed Medication", shows "(Schedule II) oxyCODONE 30 mg tablet" with a "Replace..." button. The middle left section, "Original Prescriber", lists "Davidson, Ben" with address "2700 Van Buren Avenue, Eagleville, PA 19403". The middle right section, "Patient", lists "Whiteside, Kara" with DOB "01/11/2002" and address "23230 Seaport, Akron, OH 44306". The bottom section, "Pharmacy", lists "Bannockburn Pharmacy 6798 Pyle Rd, Bethesda MD 20817, 301-644-2418". The "Refill" section shows "Total number of dispensings approved: 4" and "Written Date: 07/17/2019". A red warning message states: "When processing refill requests, the provider takes full responsibility that the drug presented by the requesting pharmacy is the appropriate renewal data for the originally prescribed medication." At the bottom, there are checkboxes for "Ready to Sign" and "Sign and Approve", along with "Deny" and "Cancel" buttons.

Figure 32 – Refill Response – Replaced Medication

Added Features (continued)

Medications – Process Refill Request – Refill Response (continued)

Do note, if the refill request was received from a pharmacy that is still using the older 10.6 version format, when trying to replace a non-controlled substance medication with a controlled substance medication, once the controlled substance medication is selected in the Medication Search dialog, the system will generate a Controlled Substance Error message indicating that issue and not allow you to select the controlled substance. See Figure 33.

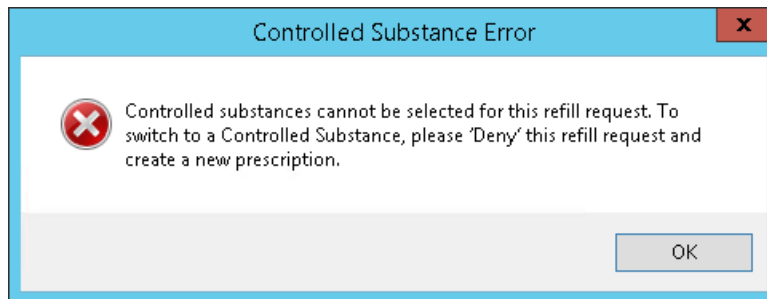


Figure 33 – Refill Response – Controlled Substance Error

- **Medications – Process Refill Request – Refill Response** – With the NCPDP 2017071 schema format changes, the system has been updated so that you are no longer able to process a refill request for a controlled substance when the request was from a pharmacy that is still using the older 10.6 version format. In the Refill Response dialog, when you check the **Ready to sign** option for a controlled substance from a 10.6 pharmacy, a Controlled Substance Error message will be generated, outlining the issue and how to proceed with this request. See Figure 34.

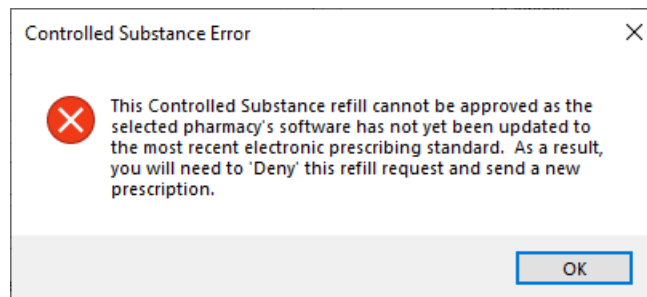


Figure 34 – Refill Response – Controlled Substance Error

- **Medications – Process Refill Request – Refill Response** – With the NCPDP 2017071 schema format changes, and the ability to replace medications in the Refill Response dialog, the **Deny but new Rx will follow** button and functionality has been removed. See Figure 35. You will now be able to Approve or Deny refill requests for non-controlled substances, and Sign and Approve or Deny refill requests for controlled substances.



Figure 35 – Refill Response – Approve/Deny

Added Features (continued)

- **Medications – Process Refill Request – Refill Response** – The Original Prescriber and Patient sections of the Refill Response dialog have been updated to display all the communication numbers and addresses (phone numbers, beeper numbers, fax numbers, email address, and direct address) included in the refill request. See Figure 36.

The screenshot shows a software interface for a Refill Response dialog. It is divided into three main sections: Original Prescriber, Patient, and Pharmacy. The Original Prescriber section includes fields for Prescriber (Ganguly, Sanjana), Location (From Refill Request), Address (2700 Van Buren Ave, Eagleville, PA 19403), Primary Phone (707-944-2142 [4221]), Fax (707-944-2121), and Email (Marguerite.Pimpernel@MediStar.com). The Patient section includes fields for Name (Devereaux, Margaret Adelia), DOB (10/01/2007), Sex (Female), Ht (48 in), Wt (142 lb), Primary Phone (707-944-2142 [4221]), Fax (707-944-2121), and Email (Marguerite.Pimpernel@MediStar.com). The Pharmacy section includes a field for Bannockburn Pharmacy 6798 Pyle Rd, Bethesda MD 20817, 707-944-2142. Red boxes highlight the communication numbers (Primary Phone, Fax, and Email) for both the Original Prescriber and Patient sections.

Figure 36 – Refill Response – Communication Numbers

- **Medications – Process Refill Request – Refill Response** – With the NCPDP 2017071 schema format changes, the system has been updated so that you can now process a refill request for a Schedule II controlled substance. Do note, however, that you are only allowed one dispensing for the refill. The **Total number of dispensings approved** field must contain **1**, and any other number greater than 1 in this field will generate will a Schedule II Controlled Substances Warning outlining this issue, and you will not be able to continue with the approval of the refill until this is changed. See Figure 37.

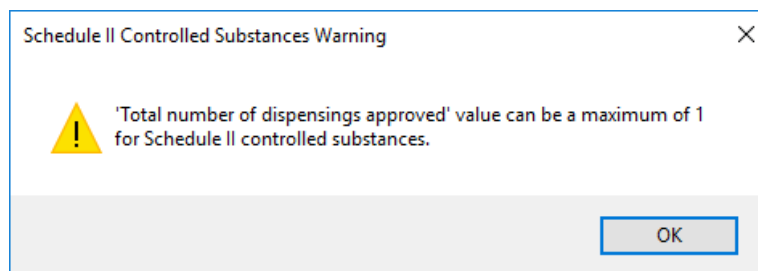


Figure 37 – Refill Response – Schedule II Controlled Substance Warning

- **Medications – Process Refill Request – Refill Response** – The Refill Response dialog has been updated so that when a GHB medication is being processed, the Notes to Pharmacy in the Pharmacy Dispensed Medication section, needs to contain GHB:[some reason]. If a reason is not entered, in this format, a GHB Reason Required warning message will be generated when click the Ready to sign option, and you will not be able to continue to approve the request until the reason is entered. See Figure 38.

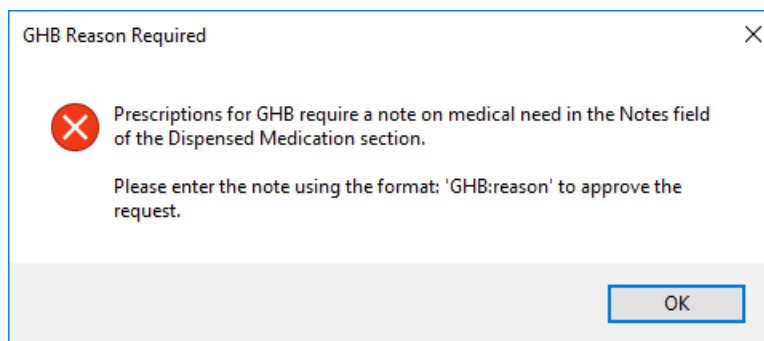


Figure 38 – Refill Response – GHB Reason Required

Added Features (continued)

- **Medications – Process Refill Request – Refill Response** – The Refill Response dialog has been updated to provide a drug interaction check that will trigger when the **Approve** button is clicked for non-controlled medications, or when the **Ready to Sign** option is checked for controlled medications. If there is an interaction for the medication you are processing, an Interactions Present dialog will appear outlining the various interactions. See Figure 39. As when prescribing a medication, you can click the **Revise** button to take you back to the previous screen to modify the medication, or you can enter a **Comment** and then click the **Proceed Anyway** button. When entering a comment and proceeding, the drug interaction comment will appear in the auto-drug log.

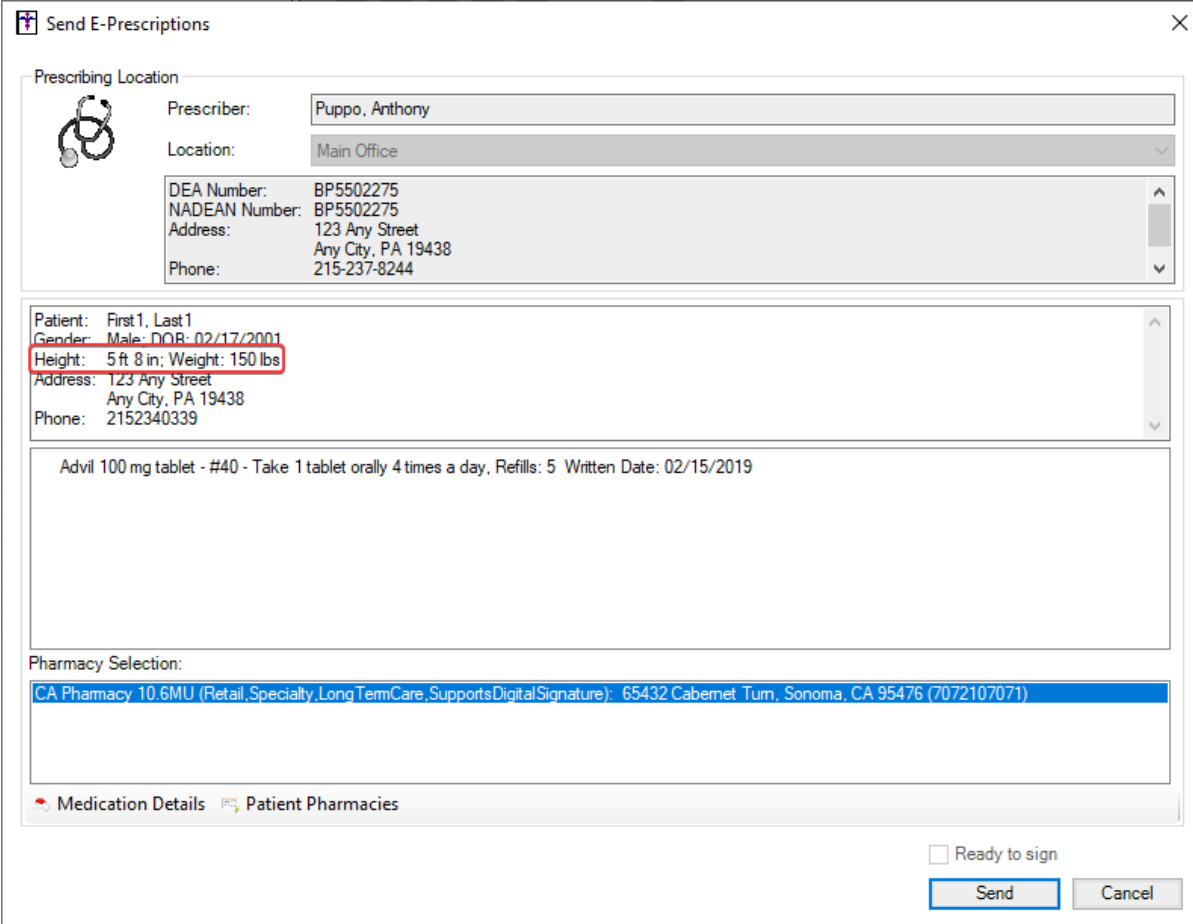
The screenshot displays the 'Refill Response' dialog box with a central 'Interactions Present' warning. The main dialog contains fields for 'Provider Prescribed Medication' (digoxin 125 mcg tablet) and 'Pharmacy Dispensed Medication' (phenelzine 15 mg tablet). It also includes fields for directions, notes, NDC, date written, diagnosis, and prescriber information (Davidson, Ben). The 'Refill' section shows 4 approved dispensings and a written date of 07/17/2019. At the bottom, there are buttons for 'Ready to Sign', 'Approve', 'Deny', and 'Cancel'. The 'Interactions Present' dialog lists the interaction between Fluoxetine and phenelzine as 'SELECTED MAOIS/SEROTONIN REUPTAKE INHIBITORS; SNRIS' with the note 'Concurrent use or swi'. It includes a 'Comments' field and 'Proceed Anyway' and 'Revise' buttons.

Drugs	Interaction
Fluoxetine	SELECTED MAOIS/SEROTONIN REUPTAKE INHIBITORS; SNRIS Concurrent use or swi

Figure 39 – Refill Response – Interactions Present

Added Features (continued)

- **Medications – Send E-Prescriptions** – The Send E-Prescriptions dialog has been updated to display the patient's height and weight if it was populated in the Ht and Wt fields of the Confirm Prescription dialog. See Figure 40. If there was not a height or weight value populated in the Confirm Prescription dialog, no values will appear.



The screenshot shows a software dialog box titled "Send E-Prescriptions". It is divided into several sections:

- Prescribing Location:** Includes fields for Prescriber (Puppo, Anthony), Location (Main Office), DEA Number (BP5502275), NADEAN Number (BP5502275), Address (123 Any Street, Any City, PA 19438), and Phone (215-237-8244).
- Patient Information:** Lists Patient (First 1, Last 1), Gender (Male), DOB (02/17/2001), Height (5 ft 8 in), Weight (150 lbs), Address (123 Any Street, Any City, PA 19438), and Phone (2152340339). The Height and Weight fields are highlighted with a red box.
- Medication:** Displays "Advil 100 mg tablet - #40 - Take 1 tablet orally 4 times a day, Refills: 5 Written Date: 02/15/2019".
- Pharmacy Selection:** Shows a list with one entry: "CA Pharmacy 10.6MU (Retail, Specialty, Long Term Care, Supports Digital Signature): 65432 Cabernet Turn, Sonoma, CA 95476 (7072107071)".
- Navigation:** At the bottom left, there are tabs for "Medication Details" and "Patient Pharmacies".
- Actions:** At the bottom right, there is a checkbox for "Ready to sign" and two buttons: "Send" and "Cancel".

Figure 40 – Send E-Prescriptions – Height/Weight

Added Features (continued)

- **Medications – Send E-Prescriptions** – The Send E-Prescriptions dialog has been updated to perform a NADEAN check prior to sending medications that require a NADEA Number (buprenorphine HCl, buprenorphine-naloxone, Suboxone, Subutex, Zubsolv, etc.). When a pharmacy using the latest 6.1 version format is selected, and you click Ready to Sign option, the system will check to see if the prescribing provider has a NADEA Number configured in the Prescriber Setup dialog. If a NADEA Number is not configured, the system will generate an E-Rx Send Error outlining the issue, and you will not be allowed to send the prescription until the issue is rectified. See Figure 41.

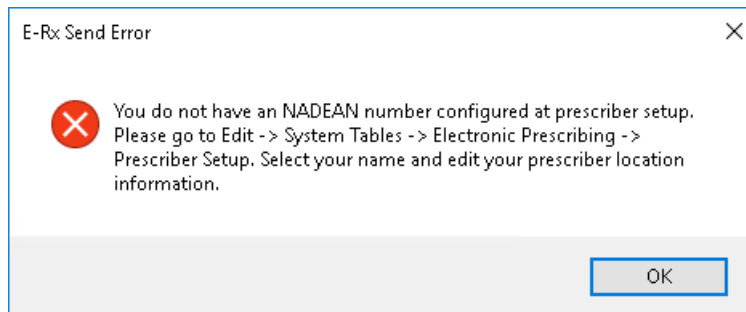


Figure 41 – E-Rx Send Error – 6.1 Pharmacy

When a pharmacy that is still using the older 10.6 version format is selected, the system will check to see if the NADEA Number was entered in the Notes to Pharmacist field. If the NADEA Number is not in this field, the system will generate an E-Rx Send Error outlining the issue, and you will not be allowed to send the prescription until the issue is rectified. See Figure 42.

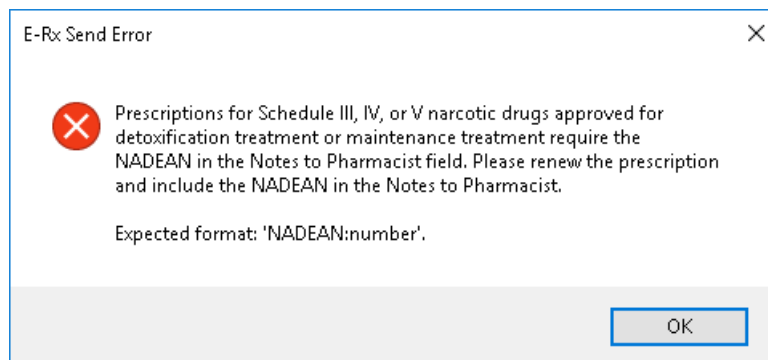


Figure 42 – E-Rx Send Error – 10.6 Pharmacy

- **Medications – Unmatched Change/Refill Request** – After you have upgraded to the latest version of CMMS (fv6.4.0.306), and thereby have updated to the NCPDP 2017071 schema format changes for e-prescribing, any legacy Unmatched Change Requests or Unmatched Refill Requests, from a 10.6 pharmacy, that were not processed prior to upgrading, will no longer be able to be processed. When clicking the To-Do List item, an Outdated Rx Request message will appear, outlining that this is from an earlier version and has been deleted. See Figure 43.

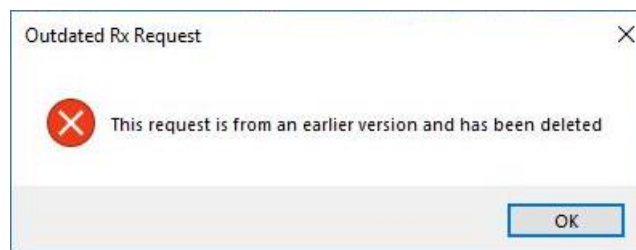


Figure 43 – Outdated Change Request

Added Features (continued)

- **MIPS Dashboard – Quality** – The **Reporting through a combination of the EHR and STI Quality Reporting Registry** option in the Quality Reporting section of the MIPS Dashboard Configuration dialog has been updated to allow you to enter a value between **0** and **6** in the **Number of measures reported** field, to indicate the number of measures you are reporting via the STI Quality Reporting Registry. See Figure 44.

The screenshot shows the 'MIPS Dashboard Configuration' dialog box. The 'Quality Reporting' section is highlighted with a red box. It contains three radio button options: 'Reporting through the EHR', 'Reporting through the STI Quality Reporting Registry', and 'Reporting through a combination of the EHR and STI Quality Reporting Registry'. The third option is selected, and the 'Number of measures reported' field is set to 4. Below this are sections for 'Promoting Interoperability Exemption', 'Improvement Activity Adjustments', and 'Cost Case Minimums', each with a 'Do I qualify?' link. The 'Eligible clinicians (NPI)' list includes Chandler, Swithin (8005501399), Dodosine, Janet A (1726969666), Doe, Alex (1232324232), Doe, John D (1231231231), and Doe, Maximilian R (1312312). The 'Practice (TIN)' is Fictional Physicians (1234567890) and the 'Facility' is STI Computer Services, Inc.

Figure 44 – MIPS Dashboard Configuration

If the dual reporting option is selected in the Quality Reporting section of MIPS Dashboard Configuration dialog, when you click the Quality card in the MIPS Dashboard to access the Quality Measures dialog, a new **Quality Score** dialog will appear that prompts you to enter the total score for those measures calculated in the STI Quality Reporting Registry. See Figure 45. The total score that can be entered will be determined by the number of measures configured in the MIPS Dashboard Configuration dialog (where the highest value is the number of measures multiplied by 10).

The 'Quality Score' dialog box prompts the user to enter the Quality MIPS Score calculated from the STI Quality Reporting Registry dashboard. The 'Quality score' field is set to 35 / 40 points. There are OK and Cancel buttons.

Figure 45 – Quality Score

After a value is entered, and the OK button is clicked, the Quality Measures dialog will appear, and you can then select the applicable measures, calculate the scores, run reconciliation reports, etc. as in previous versions. However, the score available in the Quality Measure dialog will be determined by those being reported via the STI Quality Reporting Registry, up to a total of 6 measures. For example, in Figure 42 above, 4 measures were selected to be reported from the STI Quality Reporting Registry, therefore in the Quality Measures dialog, the score will be taken from the 2 highest measures selected (6 minus 4 = 2). That score will then be added to the score entered in the Quality Score dialog to get your total Category Score.

Added Features (continued)

- **Preferences – Signing*** – The **Signing** tab of the Preferences dialog has been updated with two new preference options: **Auto-Enable API Access** and **Warn user if Patient Portal or API Access is not enabled**. See Figure 46.

When the **Auto-Enable API Access** option is checked, the system will automatically enable API Access for the patient upon signing a note if their PatientPortal status is pending or enabled, and they are not currently enabled for API Access.

When the **Warn user if Patient Portal or API Access is not enabled** option is checked, the system will generate a warning message when trying to sign a note for a patient, if the patient is not enabled for either the PatientPortal, API Access, or both. The warnings generated will differ depending upon which of these the patient is and is not enabled for, whether the export of health information has been turned off via the Patient Access dialog, or if the PatientPortal activity has suspended by your practice. See Figure 47 for examples. When a warning message is generated, you will have the opportunity to activate the service that is not enabled prior to signing the note by clicking the **Yes** button; or to continue signing the note without enabling those services by clicking the **No** button.

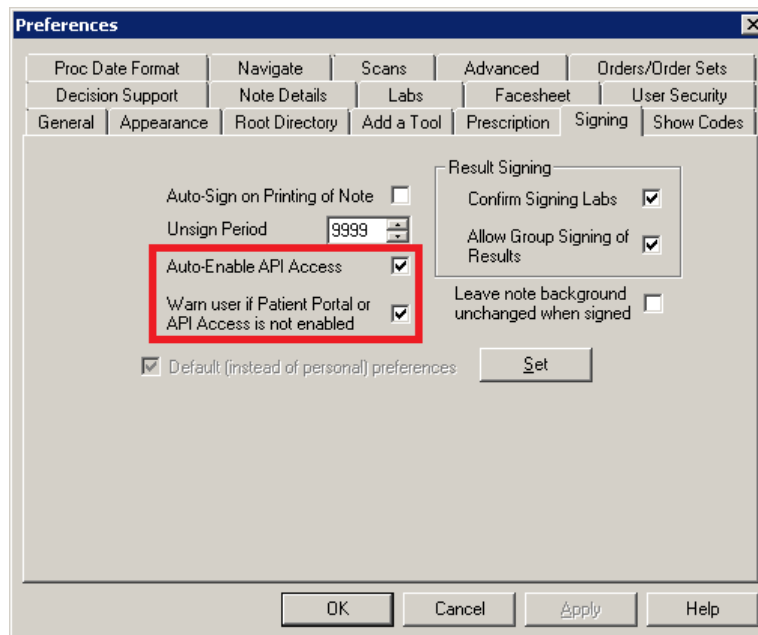


Figure 46 – Preferences – Signing

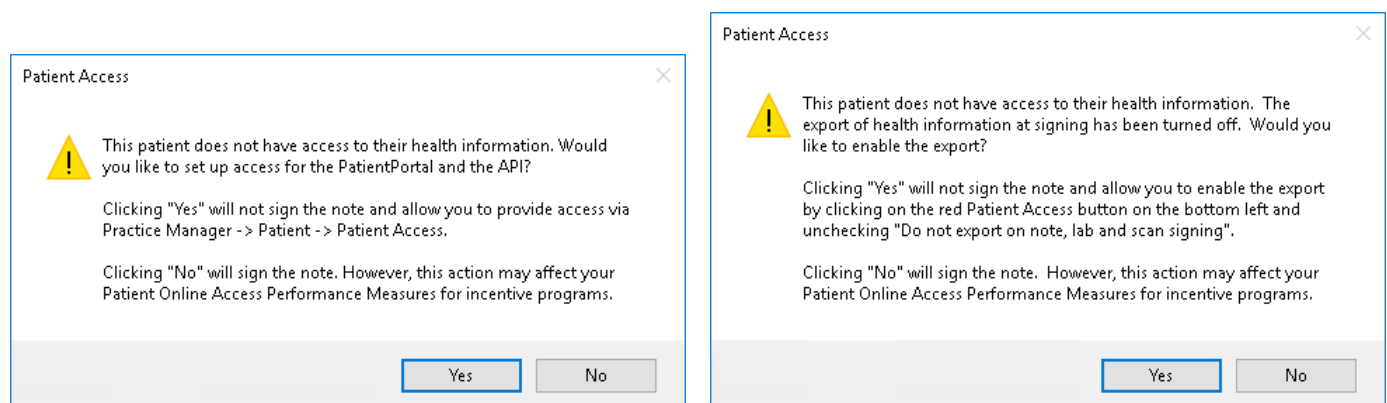


Figure 47 – Patient Access Warning Messages

Added Features (continued)

- **Reports – STI Quality Reporting Dashboard** – The system has been updated with a new STI Quality Reporting Dashboard dialog (**Reports > STI Quality Reporting Dashboard**) that allows you to view all patient notes that were sent to the STI Quality Reporting Registry for a selected date, while also allowing you to view any notes that are queued and pending export, as well as viewing any notes that have not been sent to the registry for the current year. See Figure 48.

When first accessing the STI Quality Reporting Dashboard dialog, the number of notes that are pending export will appear in parentheses in the **View Pending Exports** button, while the number of notes that have not been sent to the registry for the current year will appear in parentheses in the **View Issues** button. To access either of those lists, click the corresponding button. Each of these Pending Exports and Issues lists will display any notes for all providers and are not dependent on the search criteria selected.

To view notes that have been sent to the registry, in the Select Criteria section, select the **Note Date** and **Provider**, and then click the **Run Report** button. The Note Date field will default to the current date. The Provider field will default to All Providers, however, you can select an individual provider, if needed to narrow the search, but this field will only display providers registered for the registry for the year selected in the Note Date field.

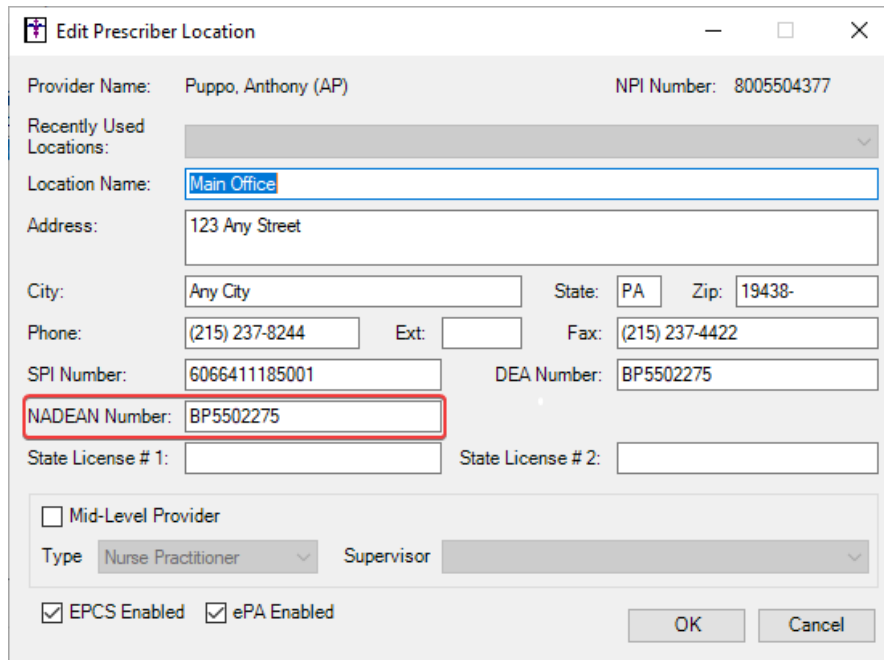
Whenever there are any results available, the **Save** button will become activated, allowing you to save a PDF file of the results. After using any of the buttons, the number of notes found will appear at the bottom left of the dialog in red. The Export Date column will display the date that the note was last exported and can be empty if the note has never been exported. Also, the Export Date column will not be displayed when View Issues button has been clicked, since those notes were never exported.

Chart #	Patient Name	Note Date	Note Heading	Provider	Export Date
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Figure 48 – STI Quality Reporting Dashboard

Added Features (continued)

- **System Tables – Prescribing – Prescriber Setup** – The New Prescriber Location and Edit Prescriber Location dialogs (accessed via **System Tables > Prescribing > Prescriber Setup**) have been updated with a NADEAN Number field, allowing you to configure the NADEA Number for the provider, for the location selected, or for the new location that you are entering. See Figure 49. The NADEA Number is required when prescribing Schedule III, IV, or V narcotic drugs for detoxification treatment or maintenance treatment (buprenorphine HCl, buprenorphine-naloxone, Suboxone, Subutex, Zubsolv, etc.). You will not be able to send new or renew prescriptions for these types of drugs, nor process any refill or change requests, to pharmacies that are using the latest 6.1 version format, unless the NADEA Number is entered for the provider in the Prescriber Setup area.



The screenshot shows the 'Edit Prescriber Location' dialog box. The fields are as follows:

Provider Name:	Puppo, Anthony (AP)	NPI Number:	8005504377
Recently Used Locations:	[Dropdown menu]		
Location Name:	Main Office		
Address:	123 Any Street		
City:	Any City	State:	PA
Zip:	19438		
Phone:	(215) 237-8244	Ext.:	
Fax:	(215) 237-4422		
SPI Number:	6066411185001	DEA Number:	BP5502275
NADEAN Number:	BP5502275		
State License # 1:		State License # 2:	
<input type="checkbox"/> Mid-Level Provider			
Type:	Nurse Practitioner	Supervisor:	[Dropdown menu]
<input checked="" type="checkbox"/> EPCS Enabled <input checked="" type="checkbox"/> ePA Enabled			
			OK Cancel

Figure 49 – Edit Prescriber Location

Do note, if you are adding or editing a NADEA Number for a provider that has been authorized for EPCS, or has a pending EPCS authorization request, you will need to revoke the EPCS authorization, or cancel the authorization request, to add or modify the NADEA Number. Once the number has been added or modify, you will then have to reauthorize the prescriber for EPCS. If you attempt to modify or add a NADEA Number without doing this, a warning message will be generated when clicking the OK button outlining this issue. See Figure 50. This is the similar functionality as when editing a DEA Number.

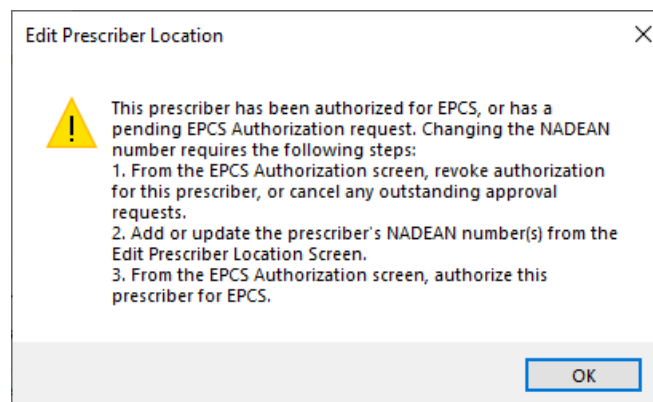


Figure 50 – Edit Prescriber Location – Warning Message

Added Features (continued)

System Tables – Prescribing – Prescriber Setup (continued)

After the NADEA Number has been successfully added, it will appear in the Prescriber Setup dialog, when the applicable provider and location are highlighted. See Figure 51.

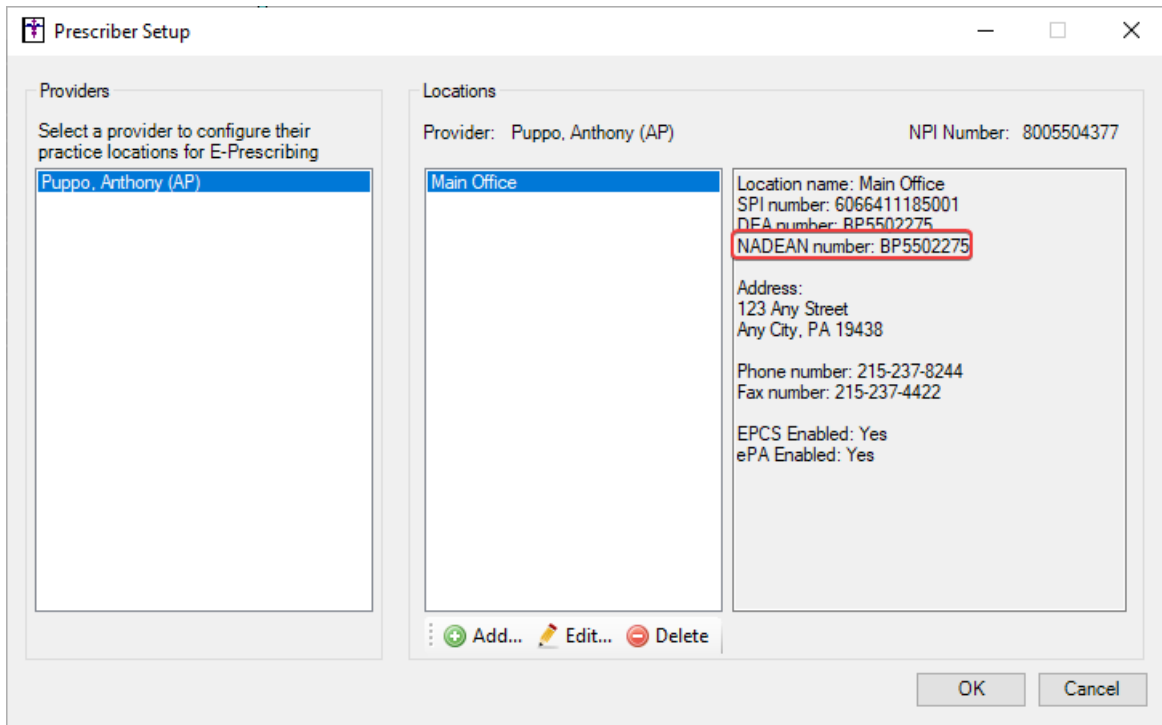


Figure 51 – Prescriber Setup

Added Features (continued)

- To-Do List – Surescripts Pharmacy Download Failed** – The system has been updated to send a **Surescripts Pharmacy Download Failed** message to the To-Do List, for users in the System Error Notification distribution list, if the pharmacy download from Surescripts has not been updated in 7 days. See Figure 52. After the 7-day threshold has past, the system will generate an initial To-List message and will continue to generate a new message for every failed download attempt thereafter (i.e., daily). Once a successful pharmacy download has occurred, the system will reset, and a message then only appear if there is an interruption of a download update for 7 days since the last successful update.

The message will state: “Your pharmacy database is currently out of date. Please contact ChartMaker Clinical Support to resolve this issue.” A description of the error will then follow to assist in troubleshooting the issue.

To-Do List for: John Doe (JD)

Buttons: New, Delete, View, Transfer, Print, Refresh, Priority: ↑ ↓

Date	From	Priority	Subject	Type	Patient	Start	Target
07/09/2019	System	High	Surescripts Pharmacy Download Failed	Message			
04/17/2019		Normal	GENERAL E&M	Unsigned Note	Doe, Abbey		
04/17/2019		Normal	GENERAL E&M	Unsigned Note	Doe, Jane		
04/09/2019		Normal	GENERAL E&M	Unsigned Note	Doe, Jane		
04/09/2019		Normal	GENERAL E&M	Unsigned Note	Doe, Jane		
04/04/2019	TED	Normal	Pending E-Rx's to send.	Message	Doe, John		
04/04/2019	TED	Normal	Pending E-Rx's to send.	Message	Doe, John		
03/19/2019		Normal	GENERAL E&M	Unsigned Note	Doe, Abbey		
03/07/2019		Normal	GENERAL E&M	Unsigned Note	Machado, Manny		
03/07/2019		Normal	GENERAL E&M	Unsigned Note	Robert, Sylvanus		
03/05/2019		Normal	GENERAL E&M	Unsigned Note	Rashada, Lance		
03/05/2019		Normal	GENERAL E&M	Unsigned Note	Machado, Manny		
02/28/2019		Normal	GENERAL E&M	Unsigned Note	Doe, John		
02/28/2019		Normal	GENERAL E&M	Unsigned Note	Doe, John		
02/19/2019		Normal	GENERAL E&M	Unsigned Note	Doe, John		
02/04/2019		Normal	GENERAL E&M	Unsigned Note	Doe, John		
02/03/2019	System	High	REQUIRED: Controlled Substance Daily In...	EPCS Incident Report Reminder			
02/02/2019	System	High	REQUIRED: Controlled Substance Daily In...	EPCS Incident Report Reminder			

1-25 of 654 items | RRR = Read Receipt Requested | Show Completed Items

Your pharmacy database is currently out of date. Please contact ChartMaker Clinical Support to resolve this issue.

Error description: Error processing web service response. Exception: System.Web.Services.Protocols.SoapException: System.Web.Services.Protocols.SoapException: Server was unable to process request. --> System.Security.Authentication.AuthenticationException: The system could not authenticate ClientID: FictionalDrs at STI.HealthPortal.Server.Web.HealthPortalWeb.SureScriptsWebService.DirectoryRequest(String clientID, String clientPassword, String xml) in C:\TeamCity\buildAgent\work\4e94345948a1efc5\web\HealthPortalWeb\Client\WSI.asmx.cs:line 145 -- End of inner exception stack trace -- at STI.HealthPortal.Client.Service.UpdateHandlers.PharmacyUpdateHandler.hpws_DirectoryRequestCompleted(Object sender, DirectoryRequestCompletedEventArgs e)

Figure 52 – To-Do List – Surescripts Pharmacy Download Failed

* This change was part of the July 24, 2019 release of ChartMaker® 2018.2. No asterisk indicates that the change was included in the July 15, 2019 release of ChartMaker® 2018.2.

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