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Qs1 primecare user manual

3 PrimeCare® GUI Management Training Guide Service Pack 19.1.29 © J M Smith Corporation 2019 2019 West St. John Street Spartanburg, SC 29306 800.845.7558 www.qs1.comPrimeCare® GUI Management Training GuideCopyright 2019 J M Smith CorporationSmith Technologies201 West St. John StreetSpartanburg, SC 29306800.845.7558To reserved rights. No part of this workbook or ancillary materials may be reproduced, stored in a retrieval system, or transmitted in any way or by any means - electronic, mechanical, photocopying, recording or otherwise - without prior written permission from J M Smith Corporation and the copyright owners. All names and services of third-party products used throughout this book are trademarks and service marks registered in common law and service marks of their respective companies. The use of the name or service of another entity product in this book is for editorial purposes only. The use of us, or the use of any trade name, is intended to convey endorsement or other relationship with this workbook or with the company. Review date: May 2019For software version: 19.1Service Pack: 29Acknowledgments:Curriculum Developer: Eric ColtraneTechnical Support: John Schmidt, Kim Stiller and Robin CrossCopy Editors: Mark Comer, Kim Jones, Robin Cross and Ryan HobbsDisclaimer:This booklet was developed to be an aid for training. Although it is a useful reference tool after training, it is not a manual or reference guide. We recommend that customers always consult for help for up-to-date information, instructions, and assistance. Qs1 suggests that caution is used before distribution to other employees in your organization. There may be information that is not intended for anyone other than management personnel.2 Introduction ©2019 J M Smith CorporationTABLE OF CONTENTSUNIT 1: Get Started

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the Patient CUI-10 blank: Payment plans may require a ICD-10 diagnostic code in the Patient Registry. If this is selected, a warning appears in the clinical check. Pharmacist Necessary for Clinical Bypass! options to determine that a pharmacist should circumvent clinical check during prescription processing. • Drug-drug interactions • Patient allergies • Patient cross-sensitivity • Patient Medical Conditions • Geriatric Precautions • Pediatric Precautions • Duplicate Therapy • Min-Max Adult Dose/Demographic Dosage • Food-Drug Warnings©2019 J M Smith Corporation Store Level Options 79PrimeCare GUI Management Training GuideClinical Interaction, Precautionary and warning levels check the desired level of clinical interactions, precautions and warning levels and click Save Categories are : • Drug-drug interactions • Food-drug warnings • Pediatric conditions • Geriatric conditions Patient education printing options • Patient education monograph format : Select the print format for dropdown monographs. • Patient monograph printer setup: Select the printer configuration for monographs from the dropdown. • Print nutrition for new Rx's: Select print a nutrition link Information Sheet for new prescriptions. • Print the Patient Education Monograph for New Rx's: Select print a Patient Education Monograph for each new prescription. • Print Patient Education Monograph for Refill Prescriptions: 74 Store-level options J M Smith CorporationPrimeCare GUI Management Guide • Print PEM & Nutritional: Select print a Patient Education Monograph or Nutritional Information Sheet when a prescription is discontinued and relocated. • Print shop header in PEM & Nutritional: Select to print the store header on Patient Education Monographs and Nutritional Information Sheets. • Impression of allergies in patient education Select to print patient allergies in Patient Education Monographs. • PEM Print Query Notice: Select to print the Consultation Notice required by ca on patient education monographs. • Print Color and Form of Drug in PEM: Select to print color and shape of the drug (if available in the drug database) in the Patient Education Monograph. • Print information on drug printing in the EMPJ: Select to print image/print of medicines (if available in the drug database) in the Patient Education Monograph. • Print the Patient Name in the PEM: Select to print the patient's name in the Patient Education Monograph. • Print Pharmacist Name on PEM: Select print the pharmacist's name on the Patient Teaching Monograph Label monograph printing options (Routine S19) • Start line number: Enter the page line number to start printing monographs. For example, if there are 60 lines per page and you type 20, the monograph begins to print on line 20. • Length of the monograph (Number of lines): Enter the number of lines on the page to be used for monograph printing. • Lines per inch (6, 8, 12): Enter the numberlines per inch to print. • Print Rx Information: Select to print the following monographs: • Patient Name • Rx Number • Rx Data • Dispensed Drug • Qty Dispensed • Color (or Printing) • GIS • Pharmaceutical Name • Physician Name • Allergies©2019 J M Smith Corporation Store Level Options 79PrimeCare Management Training GuideAdditional Rx Request OptionsOptions • Print Physician DEA#: Select to print DEA# on Refill Request Forms. • Print NP#: Select to print NP# on Refill Request Forms. • Print doctor's message: Select to print the doctor's message on the Refill Request Forms. • Print the doctor's printed name: Select to print the doctor's name on the Refill Request Forms. • Dismiss as written format: Select the DAW format from the drop-down list. • Print the patient's social security number: Select to print the patient's SSN on the Recharge Request Forms. • Print patient medical record #: Select to print patient's medical record# on Refill Request Forms. • Print Pharmacist Name: Select to print the pharmacist's name on the Refill Request Forms.76 Store level options ©2019 J M Smith CorporationPrimeCare GUI Management Guide • Print Rx Barcode: Select to print the Rx barcode on the Refill Request Forms. • Use the installation address: Select to print the installation address on the Installation Forms • Select Fax Message: Select the fax message to use for the Reload Request Form from the withdrawal. When selected, the message appears at the bottom of the screen. • Display physician reload request: Select the format option to use in the Reload Request Form from the withdrawal. Each option is displayed to the right of the field when selected. • Cover page file name: Pattern in the cover page file name. • Cover page version: Select the version number for the dropdown fax cover page. This version should match the file name of the cover page, as well as the configuration of the version in the QSI Fax Viewer. • Message: Enter the message in this field that you will fax to doctor.©2019 J M Smith Corporation Store Level Options 77PrimeCare GUI Management Training GuideDoctor Fax and IVR OptionsRefill Request Options Settings • Add phone numbers from 1 to 10 digits: Select and the system automatically dials 1, then the 10-digit phone number. • Phone Store: Enter the phone number of the main store. • Store fax: Enter the store fax number. IVR and Call Out options • Fax prewriter automatically: Select to automatically send the doctor a reload request for a prescription without reloading remaining calls via IVR: the prescriber's fax number must be filled in. • Automated reload options: Select the options needed for ivr setup from the dropdowns (the IVR Technician will help). • Automatic Electronic Refill: Select to automatically send an electronic refill request to the prescriber. E-Precription prescription fields must be filled in Doctor Record.78 Store-level options ©2019 J M Smith CorporationPrimeCare GUI Management Guide • Use Call Out Feature: Select this option to enable IVR Call Out features. • Number of call attempts: Enter the number of times the call will be attempted before considering the call as a failure. • Minutes Between Call Attempts: Enter the number of minutes between a call attempt and the next attempt. • Minutes between fill and first call: If the workflow is not used, type the number of minutes that the system will wait. Be sure to allow sufficient time for the Point of Sale checkout when setting this feature. • Days Between Filling and Return to Stock: Enter the number of days to wait after filling out the prescription before returning the quantity dispensed to stock. For withdrawal calls, this amount is used to inform the patient of the last day that the prescription can be collected before being returned to stock. • Send call failures to tickler: Select to place a record in the Tickler File for all failed IVR calls. • Send IVR/Web Rx's to Call Out: Select this to send IVR/Web Rx's to Call Out and refills are sent to the queue to be called. If enabling text/email to call out is also selected, then text and emails are also sent to the call queue. • Send non-IVR/Web Rx's to call out: Select send rx non-IVR/Web Rx's to call out. Select send rx non-IVR/Web to Call Out and refills are sent to queue queue be called. If enabling text/email to call out is also selected, then text and emails are also sent to the Call Queue. NOTE: The SMS/Email interface must be active to use the following fields. • Enable text/email to call: Select send text/email to the call queue. • Use the alternate email/text storage name: Select the box and enter an alternate store name to use for text/email notification if desired. • Use alternate email/text phone #: Select the box and enter an alternate phone number for text/email notifications. • Use email/text Business Days: Select the box and enter working days for text/email notification. • Use Email/Text Business Hours: Select the box and enter business hours for text/email notification. • Opening hours for call: Enter the hours of operation. • Ship Ground: Select the patient's contact method from the fall for use during ground service shipping. • Ship The next day: Select the patient's contact method from the stop for use during shipping via next day service. • Automated recharge options: Select the options required for IVR configuration from dropdowns.©2019 J M Smith Corporation Store Level Options 79PrimeCare GUI Management Training GuidePricing OptionsGeneral • Automatic Rx Pricing: Select and the following rules apply. • If the Patient Registry contains a Pricing Plan, the system does not look at the Drug Registry unless the Pricing Plan is a Medicaid or a third-party Pricing Plan. In this case, the Automatic Pricing Plan is added to the Rx Record to meet U&A/C requirements. • Rx Update with New Price Plan: Select and the system automatically update the Rx Record with the Primary Pricing Plan associated with the Drug Registry. • Minimum Price: Enter the minimum price to be charged for all prescriptions. • Margin percentage formula: Select the margin percentage formula used for calculations in reports.10 Store level options ©2019 J M Smith CorporationPrimeCare GUI Management Guide • Additional fees after TP Judgment: Select add patient fees to the transaction after the third-party trial is complete. When this option is selected, the Transaction Log displays additional fees in the billing recap. Transaction log displays additional fees in the billing recap. • High Dollar Alert in Tickler/Flow Work: This function must be selected to activate the alert functions shown below. • Alert if you first fill up larger than the value: This option only applies the first time an Rx is filled. In cash, the total amount applies if the third party amount of the co-payment is reviewed. Depending on whether the workflow is reviewed, when this option is selected, the Transaction Log displays additional fees in the billing recap. This value is checked in the recharges. Values that exceed the previous value create Workflow or Tickler alert messages. NOTE: Consult your trainer about setting up high-dollar alerts. There are some additional settings required. Tax percentages • Rx Sales Tax %: Enter sales tax for prescriptions in your state/municipality. • Rx Fixed Tax: Enter the fixed rate amount for prescriptions in your state/municipality. • OTC Sales Tax %: Enter sales tax % for OTC items processed as prescriptions in your state/municipality. • OTC Fixed Tax: Enter the fixed rate of OTC items processed as prescriptions in your state/municipality. Drug cost percentage default • AWP % cost calculation: Enter the percentage to use to calculate the AWP cost of a drug. This value is the default value in the AWP field in each Drug Registry. • Medicaid cost calculation %: Enter the percentage to use to calculate the Medicaid cost of a drug. This value is the default value in the Medicaid Pct field in each drug registry. • Calculation of acquisition cost %: Enter the percentage to be used to calculate the cost of acquiring a drug. This value is the default value in the Procurement field in each Drug Registry. • Misc Cost Calculation 1%: Enter the percentage to use to calculate Miscellaneous Cost 1 of a drug. This is the default value in the Misc 1 field in each Drug Registry. • Misc 2% cost calculation: Enter the percentage to use to calculate the Miscellaneous Cost 2 of a drug. This is the default value in the Misc 2 field in each Drug Registry. • Misc cost calculation 3%: Enter the percentage amount to be used to calculate the misc 3 cost of a prescription. 100.00 displays as the default value in the Misc 3 field in each Drug Registry.©2019 J M Smith Corporation Store Level Options 80PrimeCare GUI Management Training GuideReconciliation GuideReconciliation Write Off OptionsAnd an unpaid amount or variance paid by a third party is less than the amount charged in the transaction after reconciliation occurs, the system allows the processing of a write-off. This relates to the Process Desorption function in Utilities/System Reconciliation. • Small Variance Values: Enter an initial and final dollar value to define the small amount range. Example: \$0.01 to \$5.00. The default is 00. • Large Amounts of Variance: Enter a higher and lower dollar value to set the Large Quantity Range. Example: \$5.01 to \$20.00. The default is 00.NOTE: Access to these options is controlled in Security Access 82: Store Level Options ©2019 J M Smith CorporationPrimeCare GUI Management GuideDocument Scanning/imagingThis option is used to scan documents in the and connect them to specific records. The Document Scanning Module must be purchased from QSI to use all optional records. If the module module were not purchased, only prescriptions can be scanned. Possible options with Document Scanning Module : • Drug Registration • Installation Documents • Patient Insurance Record • Non-Drug Applications • Patient Record • Prescription Record • Prescription Record • Prescription Transaction RecordNOTE: For best viewing of documents, set the screen resolution to at least 1280 pixels. Document store control options select display image prescribed to automatically copy and display the scanned/imported prescription image. If not verified, the display link, Image Available, is displayed in its place in the Rx Summary. • Store level options 83©2019 J M Smith CorporationPrimeCare GUI Management Guide Click Rx Filing and select Require copy scanning. If this option is selected, and rx origin filed in the Prescription Registry is 1, 2, or 4, the prescription can only be profiled until the copy of the prescription is scanned.84 Store-level options ©2019 J M Smith CorporationPrimeCare GUI Management GuideDocument Descriptions and Default Image PathFore scanning or importing any documents, a description in the document description option in Store Control and a Document Pattern Image Path must be entered. In the menu bar, select Store Control, Document Settings, and Document Descriptions. Select the Document type by clicking the corresponding icon and type the document description in the provided field and click Add.Click Salvar.Na menu bar, select Store Control, Document Settings, and Document Default Path. The following screen is displayed. Set the default image path to import images into the system and click Save.©2019 J M Smith Corporation Store Level Options 85PrimeCare GUI Management Training Guide86 Store Level Options ©2019 J M Smith CorporationUnit 4: Facility Record Management Objectives• Create Facility Records• Set Up Non-Drug (Permanent) Orders • Add Medical Orders and Medical Records• Administration Logs• Set up installation control log registry printing options• Set administration hours Management training guide for GUI/primecare Installation Registry Installation registry An installation record must be created for each nursing home being serviced through the QSI/PrimeCare system in order to create medical application forms and MARs. This registry instructs the system on how to print MARs, Rx Labels, and Medical Order Forms so that they meet each individual's requirements. In the PrimeCare main menu bar, click Facility Management and Facility/Unit Records Management. The installation scan screen displays. Click Ctrl+H or press to add a new record. A blank installation information record is displayed. Enter the necessary information. Click Save or press Ctrl+S to save the record. The system displays the recommended installation Code. Enter the desired code or click OK to save the recommended code, or enter the desired installation code. This code cannot be changed after Okay. NOTE: When adding a Facility Record, a Company Registry is also created.©2019 J M Smith Corporation Facility Record Management 88PrimeCare GUI Management Training Facility Record Vertical Icon BarThe vertical icons of the icon bar in the Facility Registry are explained below: General information: Stores all demographic information of the installation. This screen stores control for medical order forms and medical administration registration forms. Drug lists and room format are defined here. NOTE: The Submission Clarification Code and Special Packing Indicator are only active when the Installation Defined cms Pat D = YES and the Patient's Residence = 03. These fields are then copied to the Drug and Prescription Records. If these fields are not completed during processing, the shipping clarification code and special packing indicators are required for short-cycle billing, displays. Drug list definitions • Inventory item list: Inventory items are stored at the facility, ordered for a patient, but no transactions created in the Patient Registry (usually OTC items or items typically provided as part of a patient's daily care). • List of Contractual Medicines: A price list specific to the negotiated installation contract. • List of Floor Stock Medicines: Items stored in the unit instead of the pharmacy. Transactions are created for these items in the Patient Registry. • Stop Orders Drug List: A list of medicines to which the facility wants to assign special stop dates. This replicates the stop days system by class. • Emergency Kit Drug List: Each facility can have up to ten lists of emergency kit medications, containing up to 100 drugs each.90 Facility Records Management ©2019 J M Smith CorporationPrimeCare GUI Training Guide Additional Information: Store Prescription Processing Options, Batch Label Processing Options, Pricing Options, Label Replacement, Transfer Orders, and Interface Information. A/R Options: Displays A/R summary information. Other options set here are Min Nursing Home Credit, Restock Fee, Charge Account, Auto A/R, Separate Statements, and Per Diem Rate Table Billing Matrix: The Facility/Unit Billing Matrix has six columns: Payor, Price Plan, Load Account, Deletions, Exceptions, and Continuation.Workflow Options: The workflow process is initialized by setting flags in the Installation Registry Workflow Options part.Ward List: The Ward List is used to create a list of all beds for ease. Once a wings is selected, all rooms for the display of the wings in the Rx Electronic: The Rx Electronic processing screen stores the identifiers and qualifiers required for electronic prescription. Therapeutic Exchange: The Therapeutic exchange option is used to set up a master list of therapeutic plan tables and assign them to the facilities.©2019 J M Smith Corporation Facility Record Management 91PrimeCare GUI Management Training GuideStanding OrdersDe 2008, the Standing Standing Screen can be used to insert opening orders applicable to all patients as they are connected to the facility. Make sure that the Transfer orders field on the Additional information screen of the Facility Registry is selected. These can be printed on several different medical application forms. From the facility registry, click to access the permanent orders screen. Click or press Ctrl+N to create a new Permanent Order. The new non-drug Order screen is displayed. Non-drug order screen field settings: Type: Sets the non-drugged order type. There are predefined types or new types can be added. • Number: System generated when an order is created.92 Facility records management ©2019 J M SmithPrimeCare GUI Management GuideDescription: Text for the order. The maximum is two lines of 50 characters. • HOA Code: Administration hours code for this order. • Original order date: The date of entry of the order. • Date of stop request: The date on which the order must expire. • Status: Displays the status of the order. There are three different status types: Delete, Header, and Preserve. • Last used: The system-maintained field displays the date the order was created, edited, discontinued, or printed on an order form. Enter the necessary information. Click Save or press Ctrl+S to save the record. NOTE: Click the link to select the desired type. Scroll down to see all available types. Click Next to view additional types. To add new types, select a blank non-drug order and click to edit. Save all changes. NOTE: When selecting the type, the system returns to the Edit non-drug order screen. Enter the Replacement Order order as desired. The Permanent Order will have prominent text to indicate where a line break will occur in the Medical Order Records and Medication Administration.©2019 J M Smith Corporation Facility Record Management 93PrimeCare GUI Management Training GuideAdd Physician Orders and MARs Print the form numbers must be added to the InstallaDo Facility Information Record, right-click Medical Recommendation Forms or Medical Administration Registration Forms. Up to three of these forms can be expired per installation. The installation Wizard appears. Select the desired form, click Follow. The Print Options screen appears for the selected form. Enter the necessary information. Click Finish when you're done. NOTE: Be sure to scroll down and answer ALL options by form. These options determine how form impressions. Help for a description of these forms.94 Facility Records Management ©2019 J M Smith CorporationPrimeCare MANAGEMENT GUIDE FOR GUISet Hours of Administration (HOA)TheAdministration Hours Code Table allows you to print the appropriate times that medication is given in MARs. Each installation you service may have a different HOA list. The system has a separate table for installation. When setting up HOA codes, include the default installation pass-through times in the installation HOA table. This allows specific code to be used through order entry. Actual printed times can be controlled at any installation or as a level. For example, the 1D Code can be used for any drugs given once a day. Installation might set 1D to 9 AM and installation B can set the code to 9 AM. Create new hoas records the record of installations, click: the HOA Scan screen is displayed. Click New or Ctrl+N, the New Administration Hours window displays.©2019 J M Smith Corporation Facility Record Management 95PrimeCare GUI Management Training Guide Enter the necessary information for each new HOA code. Hoas registration field settings: • Code: Enter a code of up to four characters to use when filing orders (for example, 12: Every 12 hours, 1D: Once daily, 2D: Twice a day, HS: At bedtime, PR: PRN, TR: Treatment). • Frequency: Enter a code to identify how often a medicine is given. The following values are: 3: Three Times a Day 4: Four Times per Day M: Miscellaneous H: At Bedtime P: PRN O: Every Other Day 1: Once a Day 2: Twice a Day • Group: Displays the Facility Record in which the HOA table is linked. • Asa: Displays the wings on which this HOA applies, if applicable. • Time 1: Time 12: Type of administration to be printed on MAR (e.g. 8.00, 15.00 or 20.00). • Days to Administer (Mon-Sun): Represents the days of the week of the medication is administered. • Number of days to skip: Enter the number of days to jump between administrations (for example, if the request requests a tablet every three days, type 02 in this field. The number of days to skip is based on the date of the original order. Enter after entering all the necessary information, click Save or press Ctrl+S to save the record. These codes will become the standard times for patients to receive their medications. NOTE: Set up HOA codes before attempting to attach Sig Codes to Sig Records.96 Facility Record Management ©2019 J M Smith CorporationUnit 5: Pricing/Labeling Objectives• Pricing Options• Roundtable• Access price Tables• Create new ones price tables• Access pricing plans• Create new pricing plans• Create discounts• Set up competitive prices• Create a competitive pricing plansthe gui management guide pricing guide pricing pricing functions within the NXR can be as simple or complex as necessary to meet specific pricing criteria. Set up pricing options There are several pricing options available in Store Level Options that can help you customize your specific pricing needs. access the options, click Store Control in the menu bar, click Store Level Options, and choose the price icon in the vertical toolbar. General pricing options • Rx automatic pricing: Check the box to use the Automatic Pricing Program. Automatic, adds the default price plan to a new patient record if one is not assigned at that time. • Rx Update with New Price Plan: Check the box to update the prescription price if the Automatic Pricing Plan changes in the drug registry. This feature affects Medicare Part D eligibility checks. This is typically left uncontrolled.©2019 J M Smith Corporation Pricing 99PrimeCare GUI Management Training Guide • Pricing Cost Base: Sets the standard cost base of medications to calculate the price of a prescription. The options selected in the drop-down field are AWP (Default), Medicaid, Acquisition, Miscellaneous 1, and Miscellaneous 2. This is also used to populate the Cost column in a given report. NOTE: This field is very important. If the cost base is not configured in the Price List, the software looks in this field. • Minimum Price system that replaces all Price Tables. • Margin percent formula: sets price margin. The options are (Sales-Acq)/AWP*100, [(Sales-Acq)/AWP]*100, [(Sales-Acq)/Sales]*100 or [(Sales: AWP)/Sales]*100. • Add additional fees after to judgment: Check the option to add patient fees to the transaction after the third-party trial. When this option is checked, the Transaction Log displays additional fees in the Billing Recap. • High Dollar Alert in Tickler/Workflow: By checking this box the two settings below become active. • Alerts if first fill greater than value: Set the value you want to be alerted to if exceeded in tickler/workflow. • Alerts if the increase is greater than the previous value: This value will be taken on the recharges. Values that exceed the level set will create a Workflow or Tickler alert message. Tax percentage options • Rx Sales Tax %: Enter the percentage of the state sales tax to apply to all prescriptions with pricing plans for which the Sales Tax option is selected. • Rx Flat Tax: Massachusetts only. Enter a fixed tax amount. • OTC Sales Tax %: Enter the percentage of the state sales tax. The tax is applied to all items without a prescription number. This tax is default if no tax information is entered in the Patient Registry. • OTC Fixed Tax: Enter the lump tax amount.100 Prices ©2019 J M Smith Corporation Corporation

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