

# Doctor's Homepage



*Live Well San Diego*

**County of San Diego**  
**Behavioral Health Services**



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***This handout contains screen shots of confidential and proprietary information for view only. It shall not be copied or shared for anything other than its intended purpose as a training device for the County of San Diego, Mental Health Management Information System.***



## **CONFIDENTIALITY**

**HIPAA regulations mandate that all client information be treated confidentially.**

Access to CCBH is based on your position and your job classification. You will have the access you need to complete your job duties. This can include access to clients in your Unit/SubUnit or may include full client look up. Remember – with more access comes greater responsibility regarding confidentiality!

**You are not to share passwords with other staff.** The Summary of Policy you signed before receiving your access to CCBH included your agreement to this directive. You are still responsible if someone with whom you have shared your password violates confidentiality!

**The MIS unit investigates any suspicions regarding sharing of passwords. Consequences are up to, and may include termination.**

Do not open any active client charts unless instructed to do so, or if it is required to complete your job duties. “Surfing” clients is a blatant breach of confidentiality.

Remember you are personally and legally responsible for maintaining confidentiality. Take it seriously.

Do not leave your computer unlocked with client data on the screen for others to access or view while you are away from your desk. Lock your CCBH session before leaving your computer.

When printing, make sure you are printing to a confidential printer, and pick up your paperwork quickly. Leaving printed Protected Health Information (PHI) out is also a confidentiality violation.





## **CCBH SPEAK: DHP**

<b>Prescriber</b>	Staff who can make prescribing decisions and who do not require a co-signature for medication and prescription entry. Prescribers will have their own Doctor's Homepage.
<b>Non-Prescriber</b>	Staff who can make prescribing decisions, but who require a co-signature by a Prescriber for prescription entry. Non-Prescribers have their own Doctor's Homepage.
<b>Clinical Support Staff</b>	Staff who can enter information in support of or on behalf of Prescribers and Non-Prescribers. In San Diego County, Clinical Support Staff are those in the nursing profession. They do not have their own Doctor's Homepage but access the Homepage of the Prescribers/Non-Prescribers to whom they are linked.
<b>Staging</b>	Clinical Support Staff entering information in support of or on behalf of Prescribers and Non-Prescribers. A Prescriber must Final Approve staged entries.
<b>Prescription</b>	An order that is intended to be delivered to, filled, and dispensed by a Pharmacy to the client. Prescribed medications are generally considered to be self-administered. Commonly includes non-over the counter (OTC) medications only.
<b>Sig Builder</b>	The preferred method for recording prescriptions. Gives instructions on how, how much, when, and how long a drug is to be taken. Common abbreviations (i.e. TID) can be used. Full sigs are printed on the prescription and/or transmitted to the pharmacy.
<b>Medication Order</b>	Medication Orders are not intended to be filled/dispensed by a pharmacy directly to a client. Rather, they are considered to be an instruction to internal staff to administer a medication. May include both non-OTC and OTC medications.
<b>Client Instruction</b>	Client Instructions should include only OTC medications.
<b>Pre-existing Medications</b>	May include both non-OTC and OTC medications, and does not result in a printed/routed document.
<b>ePrescribing</b>	Secure electronic exchange and validation of prescriptions between providers and pharmacies through the national electronic prescription networking vendor, <b>Surescripts</b> .
<b>Multum</b>	A medical database that provides continually updated medical information for physicians to identify potentially harmful drug reactions before prescribing medications. It also offers information specific to each drug, such as patient education materials, side effects, pharmacology, and therapeutic categories. Additionally, Multum provides a tool that considers clinically relevant factors such as age, height, weight and liver and kidney function to provide patient specific information.



## ACCESSING THE DOCTOR'S HOMEPAGE

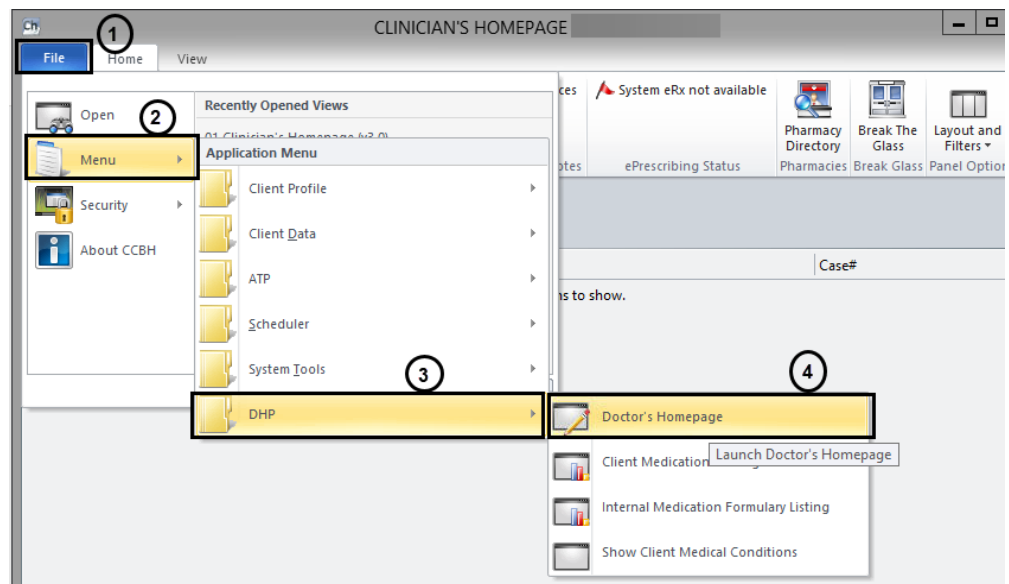
### **Prescribers and Non-Prescribers:**

Users who are Prescribers or Non-Prescribers have their own DHP. It has been set to automatically launch when you log on to CCBH. Here you will find your caseload, clients' historical medical record information, and the functions which allow you to prescribe medications (among other features).

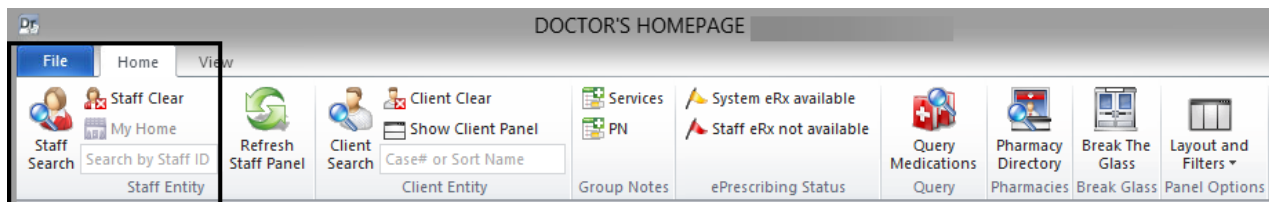
### **Clinical Support Staff:**

Users who are Clinical Support Staff do not have a DHP; rather, they will continue to maintain their Clinician's Homepage (CHP) and will have to access the DHP for those whom they support.

1. Click on "File" in the top left of the screen.
2. Select "Menu."
3. Select "DHP."
4. Select "Doctor's Homepage."



5. The Doctor's Homepage will now launch. In the upper left-hand corner of the screen, you will see a field labeled "Staff Entity." Enter the CCBH ID number of the Prescriber for whom you are providing support in the "Search by Staff ID" field and select the "Enter" key on your keyboard.



6. The Prescriber's DHP will now be displayed. From here, you can select the client for whom you will be entering medical management information.

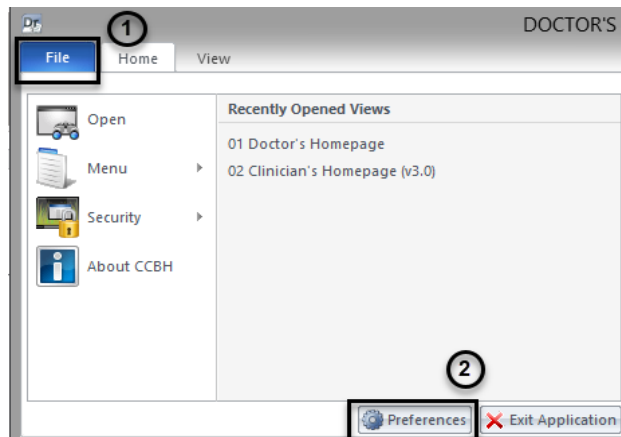


## DOCTOR'S HOMEPAGE PREFERENCES

### How to setup and save preferences

#### Accessing Preferences:

1. Click "File."
2. Click the "Preferences" icon.
3. The "Staff Preferences" window will display.

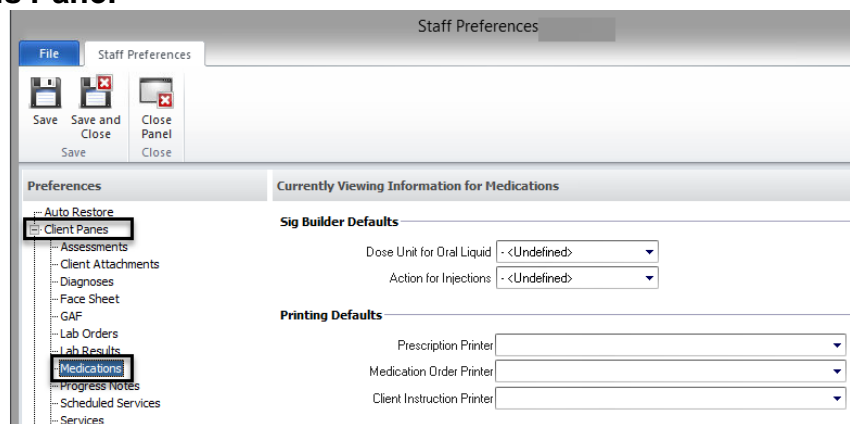


#### Setting up Preferences:

- Preferences have been pre-set based on the MIS Unit's recommendations, except for "New Assessments," which vary by user.

#### Preferences for the Medications Pane:

1. Select the plus sign next to "Client Panes."
2. Select the "Medications" option.



3. The "Currently Viewing Information for Medications" window will display. There are two areas in which information may be entered.
  - a. "Sig Builder Defaults" - leave the fields for "Dose Unit for Oral Liquid" and "Action for Injections" as "Undefined."
  - b. "Printer Defaults" - you may specify separate printers for Prescriptions, Medication Orders, and Client Instructions. This can be a convenient way to print information based on your workflow. For example, if clients are to pick up client instructions on



their way out of your clinic, the “Client Instruction” printer may be set as the printer at your front desk. You may wish the “Prescription” printer to be set up in the Prescriber’s office. The printers are selected by the drop down arrows at the end of each field, displaying a list of your network printers.

#### Currently Viewing Information for Medications

##### Sig Builder Defaults

Dose Unit for Oral Liquid - <Undefined>

Action for Injections - <Undefined>

##### Printing Defaults

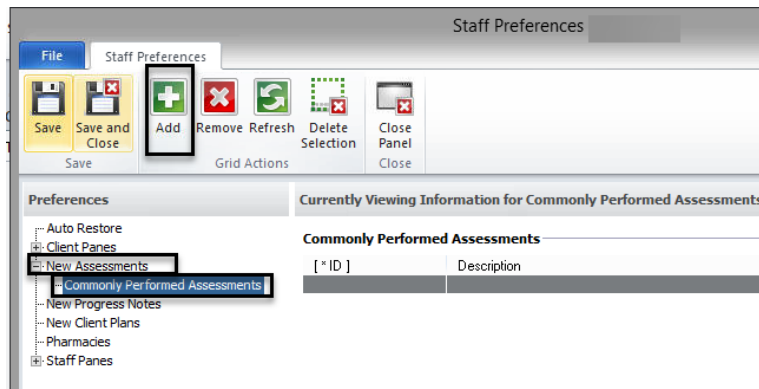
Prescription Printer

Medication Order Printer

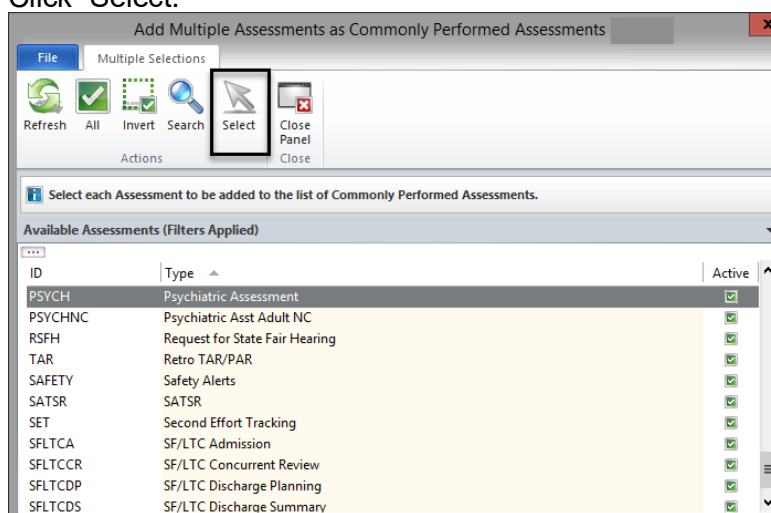
Client Instruction Printer

### Preferences for adding New Assessments:

1. Select the plus sign next to “New Assessments.”
2. Select “Commonly Performed Assessments.”
3. Click on the “Add” button.

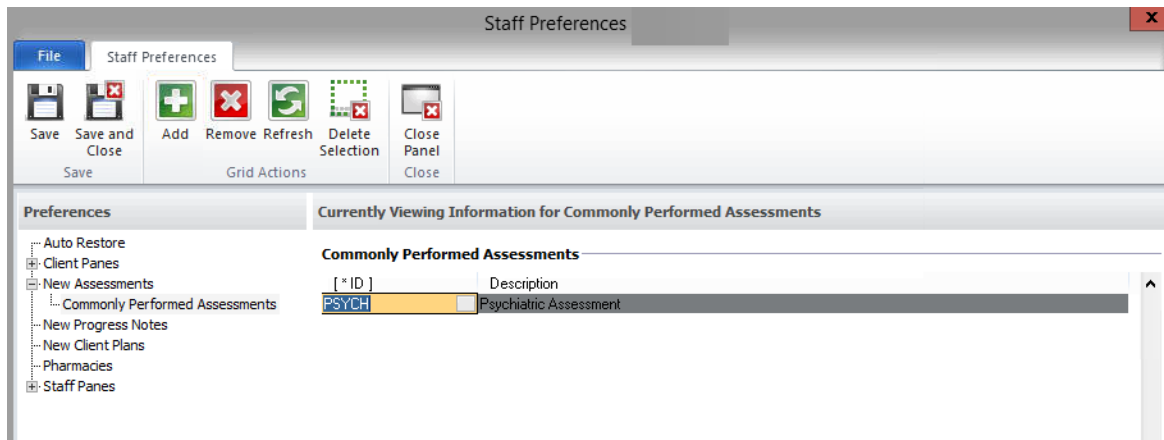


4. Select the assessment(s) *you* commonly preform. To select multiple assessments, hold down the “Control” key as you click with the mouse.
5. Click “Select.”

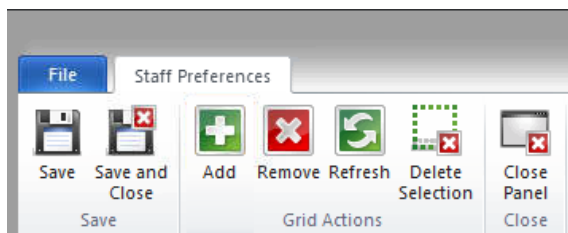




6. You will see your selections. In this example, “Psychiatric Assessment” was selected.



### Saving Preferences:



### There will be 3 options:

#### Save:

Clicking the “Save” icon will save settings only.

#### Save and Close:

Clicking the “Save and Close” icon will save your selections and take you back to the Doctor’s Homepage.

#### Close Panel:

**WARNING:** Clicking on the “Close Panel” icon will close the panel without saving. All of your preferences will need to be reset.



## DOCTOR'S HOMEPAGE TERMINOLOGY

### Identifying Terms Used on the Doctor's Homepage

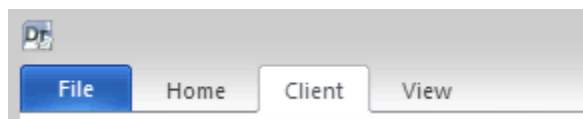
#### Doctor's Homepage:

The Doctor's Homepage is a real-time tool that provides up-to-the-minute client status at a glance. It allows physicians and other medical personnel to manage medical and prescription information all in one place.

#### Tabs:

The "Tabs" listed below are displayed at the top of the Doctor's Homepage.

- There are four tabs: "File", "Home," "Client," and "View."



*Note: When the DHP launches, only the "File", "Home" and "View" tabs are displayed. The "Client" tab only becomes available when a client's name is selected and the "Client Panel" is open.*

#### Buttons:

- The "Buttons" are individual selections that can be clicked on to perform various functions. The screen shot below demonstrates two different buttons:



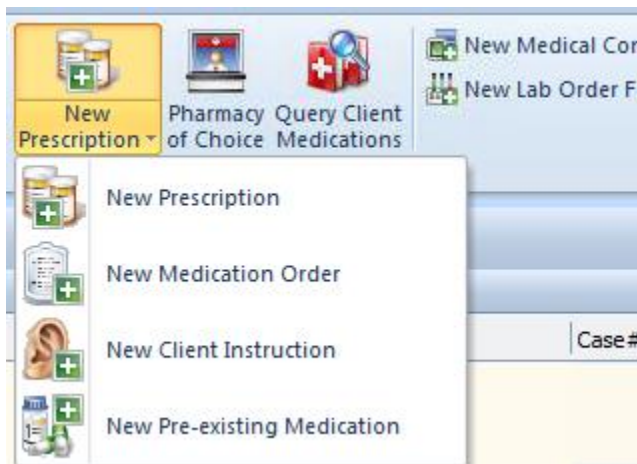
#### Ribbon:

- The "Ribbon" is the area of the Homepage comprised of various buttons. Most buttons on the DHP will be familiar to you from your use of the Clinician's Homepage (CHP). New buttons associated with the DHP (which appear when a client has been selected in the Client Panel) are seen below:





1. **New Prescription.** This button is split into a top half and bottom half. When the top half is selected, the window to enter a new prescription is immediately launched. When the bottom half is selected, another window launches that gives different options for medication management.



In addition to launching the new prescription window, you can enter a New Medication Order, a New Client Instruction, or enter a client's Pre-existing Medications. Each of these options will be described in detail in the following sections.

2. **Pharmacy of Choice.** This is a button to select to enter the client's preferred pharmacy. There are other options for entering this information which will be discussed in later sections.
3. **Query Client Medications.** This button runs a general query of the Multum database for information about a specific medication. You can select this if you want to find out general information about the side effects of a medication, or to print educational leaflets on medications for clients.
4. **New Medical Conditions Review.** This is the button you select to enter the client's height, weight, vital signs, medical conditions, and allergies.
5. **New Lab Order Form.** This is a placeholder for a future promotion and is not currently in use.





## FILTERS ON THE CLIENT PANEL OF THE DHP

Each pane on the Client Panel has the ability to be filtered. All of the filters work essentially the same way. This example will demonstrate filters on the Medications pane.

### Medications Pane

Once medications have been entered, they will appear on the Medications pane of the Client Panel. You can change the filters to display different types of information. The filter options available for display are:

1. Viewing all medications entered for client.
2. Viewing only current medications.
3. Viewing only voided medications.
4. Include Pre-Approved Medications.

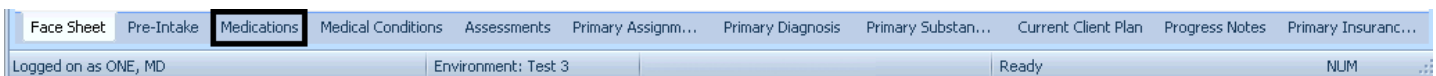
The system will default to showing all medications; therefore, this function does not have to be changed. However, it is available and may be helpful as the client list of medications increases over time.



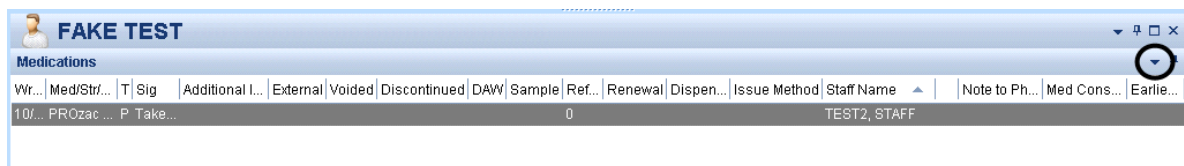
*Note: Once you log off from a session, the next time you log on, the filter will return to the default.*

How to filter the Medications pane for desired viewing:

1. With the Client Panel open, select the “Medications” pane at the bottom of the screen.



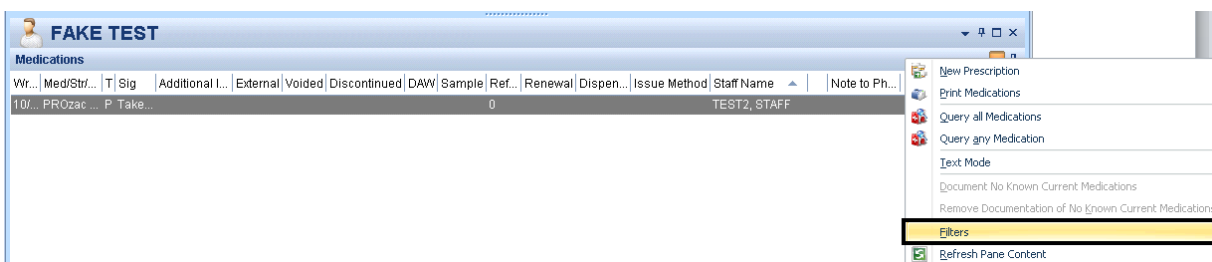
2. On the right top portion of the Client Panel, select the down arrow.



3. A drop down menu will launch. Select the “Filters” option.

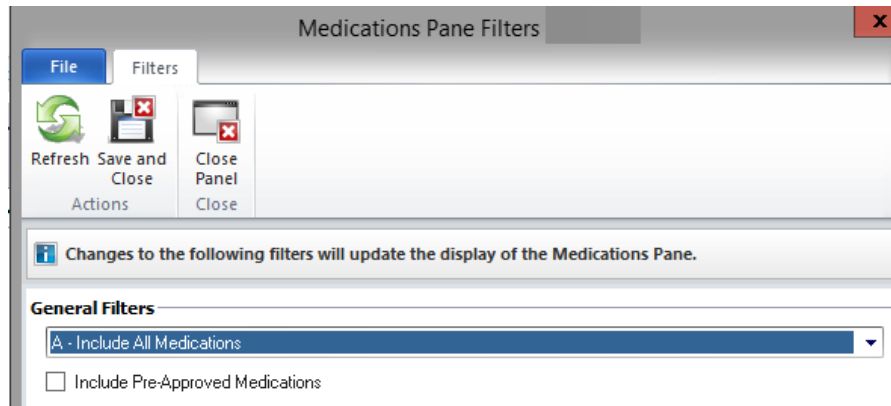


*Note: This menu will also appear when right clicking in the white space within the Client Panel.*

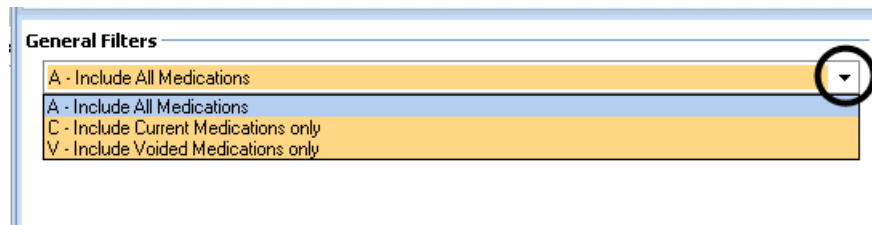




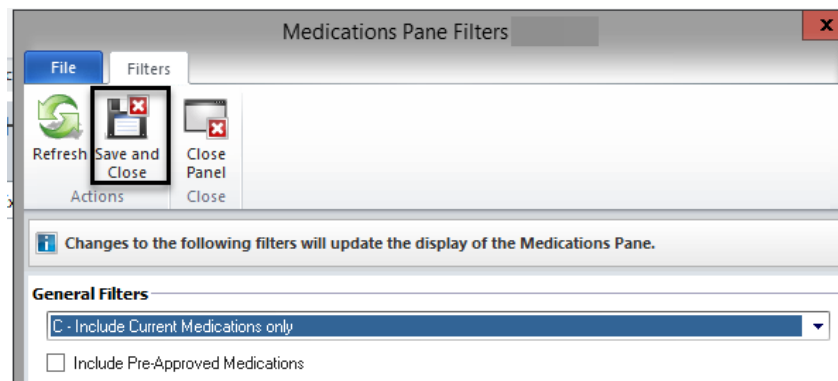
4. The general “Filters” window is launched.



5. Select the drop down to view the menu options.



6. From the menu, select the desired view options and finish by selecting “Save and Close.”



7. You will be returned to the full view of the DHP with the list of medications displayed in the Medications pane as indicated by the selected filters.



*Note: You can access the filters for the Medical Conditions and other panes in the Client Panel in exactly the same fashion.*

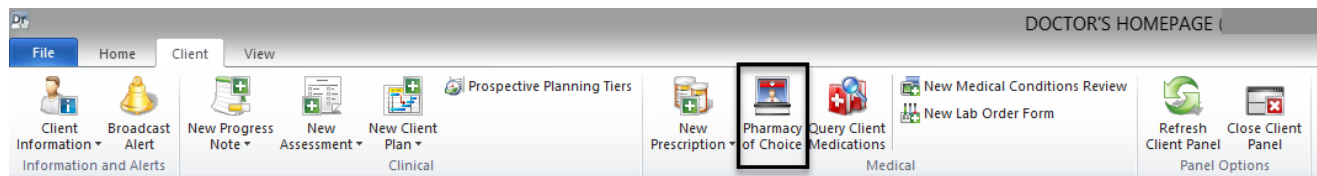


## SELECTING A CLIENT'S PHARMACY OF CHOICE

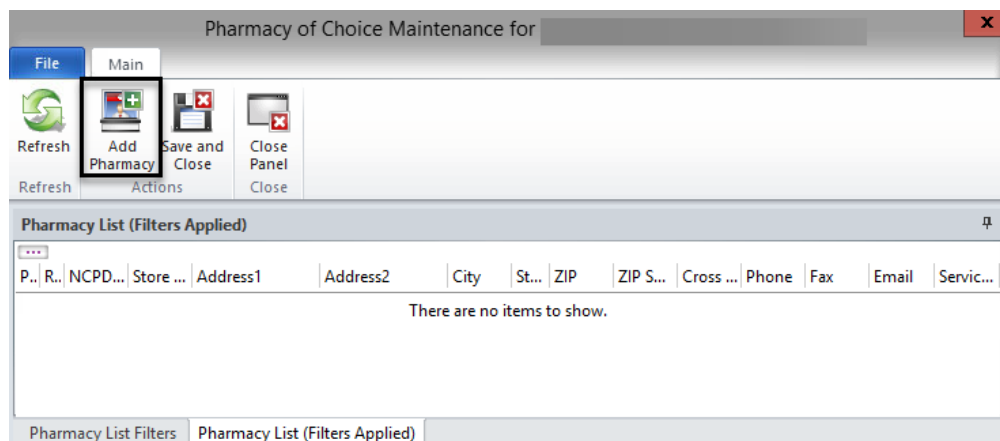
In order to send prescriptions electronically, the client's "Pharmacy of Choice" needs to be selected. The Pharmacy of Choice can **NOT** be deleted, only inactivated. However, you can choose multiple pharmacies of choice and designate one as the preferred pharmacy. The preferred pharmacy can be updated as necessary.

Follow these steps to enter the client's Pharmacy of Choice:

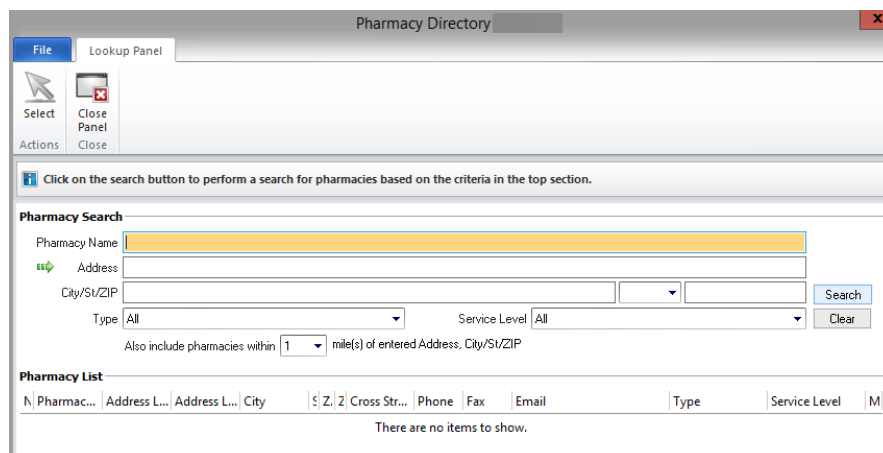
1. Select the appropriate client, and from the "Client Tab," select "Pharmacy of Choice."



2. The "Pharmacy of Choice Maintenance" window will launch. Select "Add Pharmacy."



3. The "Pharmacy Directory" window will launch.






- Search for the pharmacy by entering at least the first 3 letters of the store name and the zip code, adjust the search radius as necessary. More information can be entered in the available fields; however, this is not necessary to complete the search. By selecting the green arrow, it will populate the client's home address from the face sheet.

**Pharmacy Search**

Pharmacy Name: CVS

Address:  Address

City/St/ZIP:   92110

Type: All Service Level: All

Also include pharmacies within 10 mile(s) of entered Address, City/St/ZIP


**Pharmacy List**

N	Pharmacy...	Address L...	Address L...	City	S	Z	Z	Cross Str...	Phone	Fax	Email	Type	Service Level	M
There are no items to show.														

- Select "Search" to query the system for available pharmacies in the specified location.
- A list of pharmacies will appear on the bottom of the screen.

**Pharmacy Search**

Pharmacy Name: CVS

Address:  Address

City/St/ZIP:   92110

Type: All Service Level: All

Also include pharmacies within 10 mile(s) of entered Address, City/St/ZIP

**Pharmacy List**

N	Pharmacy...	Address L...	Address L...	City	S	Z	Z	Cross Str...	Phone	Fax	Email	Type	Service Level	M
5.	CVS/phar...	3327 ROS...		SAN DIEGO	C	9.			61922...	61922...		Retail	Controlled Subs...	1.
5.	CVS/phar...	313 E. W...		San Diego	C	9.			61929...	61929...		Retail, TwentyF...	Controlled Subs...	2.
5.	CVS/phar...	3332 San...		San Diego	C	9.		corner of ...	85827...	85827...		Retail	Controlled Subs...	4.
5.	CVS/phar...	3151 Univ...		San Diego	C	9.			61928...	61928...		Retail, TwentyF...	Controlled Subs...	4.
5.	CVS/phar...	4829 Clair...		San Diego	C	9.		IN CLAIR...	85827...	85827...		Retail	Controlled Subs...	4.

- Highlight the correct pharmacy name from the list and choose "Select."

**Pharmacy Directory**

File Lookup Panel


Select Close Panel

Actions Close

Click on the search button to perform a search for pharmacies based on the criteria in the top section.

**Pharmacy Search**

Pharmacy Name: CVS

Address:  Address

City/St/ZIP:   92110

Type: All Service Level: All

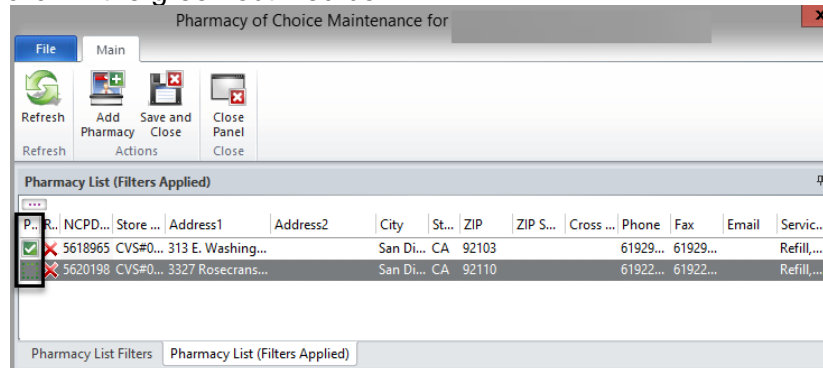
Also include pharmacies within 10 mile(s) of entered Address, City/St/ZIP

**Pharmacy List**

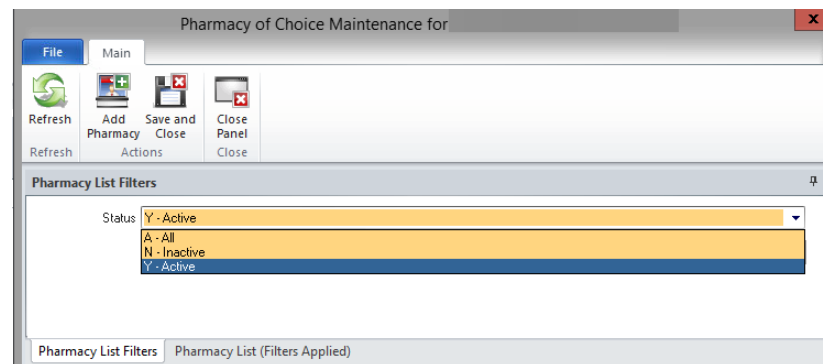
N	Pharmac...	Address Li...	Address ...	City	S	Z	Z	Cross Str...	Phone	Fax	Email	Type	Service Level	M
5.	CVS#0916...	3327 Rosec...		San Diego	C	9.			61922...	61922...		Refill, New Rx	1..	
5.	CVS#0914...	313 E. Was...		San Diego	C	9.			61929...	61929...		Refill, New Rx	2..	
5.	CVS#0910...	1652 Garne...		Pacific Be...	C	9.			85848...	85827...		Refill, New Rx	3..	
5.	CVS#0883...	3332 Sandr...		San Diego	C	9.			85827...	85827...		Refill, New Rx	4..	
5.	CVS#0914...	3151 Unive...		San Diego	C	9.			61928...	61928...		Refill, New Rx	4..	
5.	CVS#0917...	4829 Clair...		San Diego	C	9.			85827...	85827...		Refill, New Rx	4..	



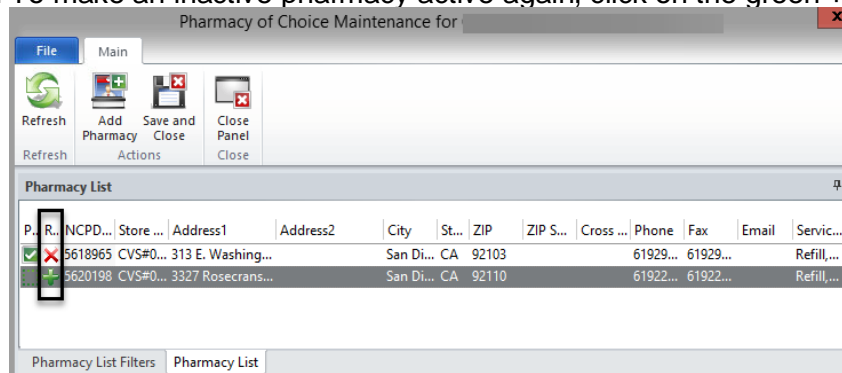
8. Repeat as necessary if the client frequents more than one pharmacy, or if the client has changed pharmacies.
9. If multiple pharmacies are entered, the preferred pharmacy will have a green check in the first column. To change the preferred pharmacy, select the new pharmacy you would like and click in the green outlined box.



10. To remove a pharmacy from being an active choice, click on the red X.
11. To view inactive pharmacies, change the filters through the "Pharmacy List Filters" pane.

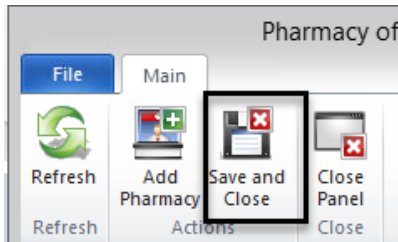


12. To make an inactive pharmacy active again, click on the green +.

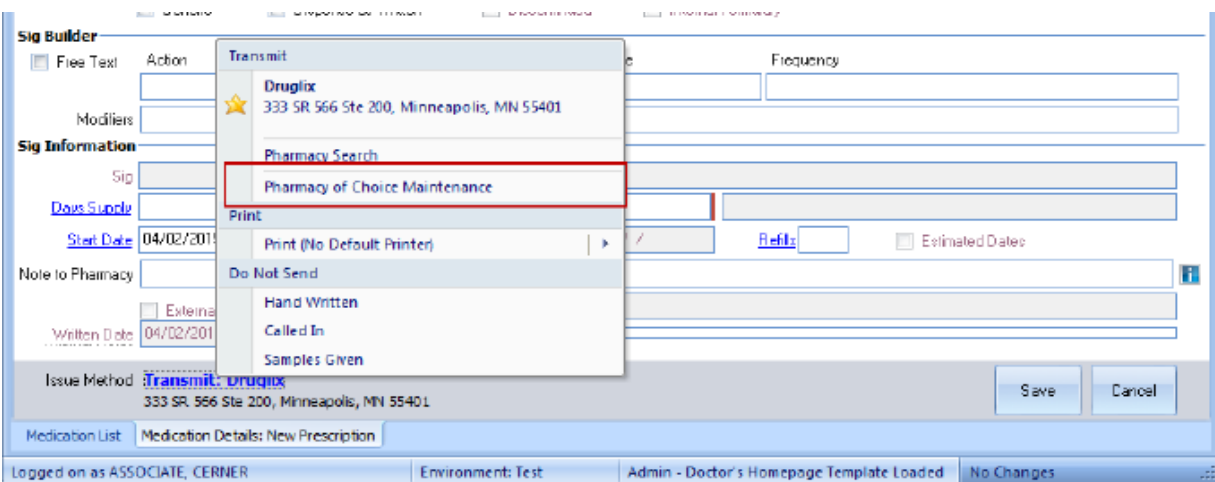




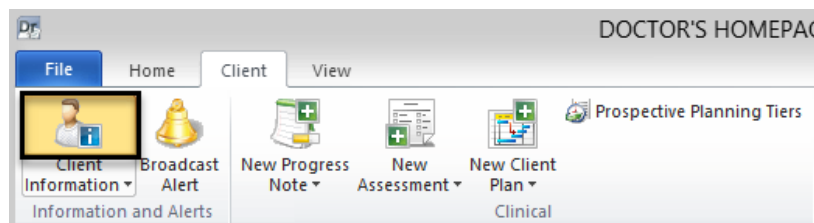
13. Once you have added and selected the correct preferred pharmacy, select, “Save and Close.”



14. When prescribing a medication, you will be able to access the “Pharmacy of Choice Maintenance” screen to update the preferred pharmacy **during** the prescribing process.






15. To view the pharmacy information, select the **TOP** half of the “Client Information” button.



16. The client's information is launched with the Pharmacy of Choice information listed. Select "Close Panel" to return to the DHP default view.

**Client Overview for** TEST AUGUST

File	Client Information
 Refresh	 Close Panel
 Close	

Description	Client Information
<b>Name</b>	TEST AUGUST
<b>DOB</b>	08/01/1976
<b>Home Phone</b>	
<b>Work Phone</b>	
<b>Episode of Care</b>	08/01/2022
<b>Primary Assignment</b>	9900 / 9901 - TRAINING UNIT / TRAINING SUBUNIT
Open/Closed	08/01/2022
▶ SAI	800001 / STAFF CLINICAL
<b>Pharmacy of Choice</b>	RITE AID-4840 NIAGARA AVE.
Address	4840 NIAGARA AVENUE SAN DIEGO, CA 921073115
Phone	619-222-7503
Fax	619-222-4926
Email	

## NOTES

[illegible]

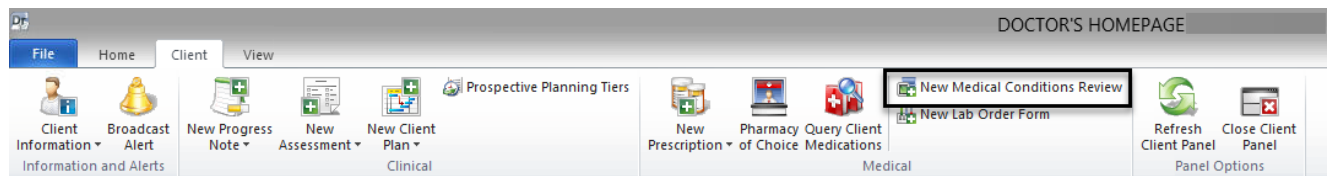


## ENTERING A MEDICAL CONDITIONS REVIEW



*Note: Medical Conditions information must be entered in order for the safety features of the DHP to function. If Medical Conditions information is not added for a client, it is not checked against the Multum database for potential medication/medical conditions interactions.*

1. Select the appropriate client, and from the "Client" tab, click on the new "New Medical Conditions Review" button.



2. The "Medical Conditions Review" window displays. It has 5 separate containers for data entry.

Client Information: 18 year(s) and 7 month(s) old Male

**General Information**

1 Height  ft  in BMI  0.0

Weight  lbs  oz

Waist Circumference  in

☐ Pregnant ☐ Lactating/Nursing ☐ Fathering a child

Source: R - Medical Conditions Review

**Vital Signs**

2 Blood Pressure  mmHg systolic  mmHg diastolic

Temperature  0.0 F

Heart Rate  /min

Respiratory Rate  /min

Blood Glucose Level  mg/dL

**Liver/Renal Conditions**

3 ☐ Liver Disease

Renal Function  mL/min

Dialysis Type

**Medical Conditions**

4 Name

There are no items to show.

☐ No Known Medical Conditions

**Allergies**

5 Name  Type  Reaction

There are no items to show.

☐ No Known Medication Allergies ☐ No Known Substance Allergies



1. **General-** The container marked “General” is for recording the client’s height and weight. BMI will auto calculate based on the information entered for height and weight. For children, BMI Percentile may be calculated by using an external website. It also may be left blank.

The “Pregnant,” “Lactating/Nursing,” or “Fathering a child” check boxes at the bottom become enabled based on the gender of the client as indicated in the Demographic form. Make the appropriate selection or leave blank.

#### General Information

Height	<input type="text"/>	<a href="#">ft</a>	BMI	<input type="text" value="0.0"/>
	<input type="text"/>	<a href="#">in</a>	<a href="#">BMI Percentile</a>	<input type="text"/>
Weight	<input type="text"/>	<a href="#">lbs</a>		
	<input type="text"/>	<a href="#">oz</a>		
<a href="#">Waist Circumference</a>	<input type="text"/>	<a href="#">in</a>		
<input type="checkbox"/> Pregnant <input type="checkbox"/> Lactating/Nursing <input type="checkbox"/> Fathering a child				
Source	<input type="text" value="R - Medical Conditions Review"/>			

2. **Vital Signs-** This container is for documenting the client’s vital signs. This information will not pre-populate when you add a new Medical Conditions Review as it should be current information.

#### Vital Signs

Blood Pressure	<input type="text"/>	<a href="#">mmHg systolic</a>
	<input type="text"/>	<a href="#">mmHg diastolic</a>
<a href="#">Temperature</a>	<input type="text" value="0.0"/>	<a href="#">F</a>
<a href="#">Heart Rate</a>	<input type="text"/>	<a href="#">/min</a>
<a href="#">Respiratory Rate</a>	<input type="text"/>	<a href="#">/min</a>
<a href="#">Blood Glucose Level</a>	<input type="text"/>	<a href="#">mg/dL</a>

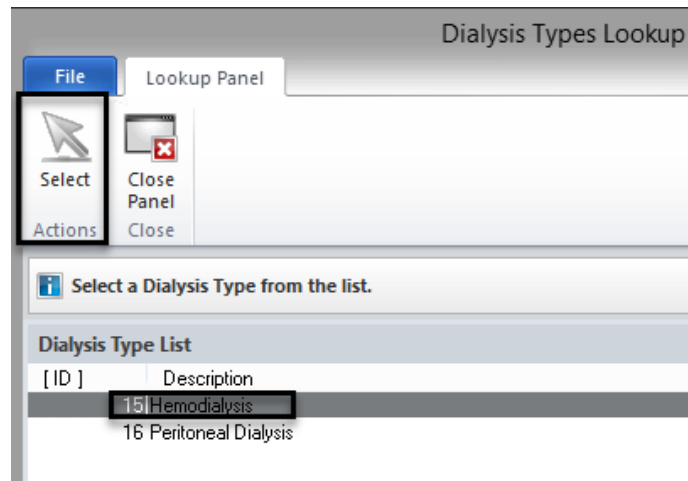
3. **Liver/Renal Conditions-** If the client has Liver Disease, indicate it by clicking in the “Liver Disease” checkbox with your mouse. If there are Renal Conditions, enter the appropriate value in the “Renal Function” field. To enter Dialysis Type, use your mouse to click on the words “Dialysis Type.”

#### Liver/Renal Conditions

<input type="checkbox"/> <a href="#">Liver Disease</a>	
<a href="#">Renal Function</a>	<input type="text"/> mL/min
<a href="#">Dialysis Type</a>	<input type="text"/>

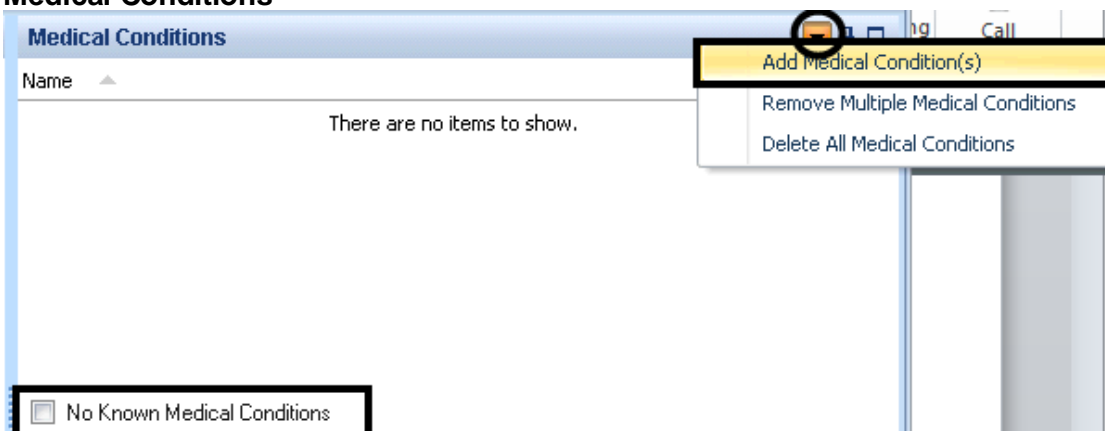


- The "Dialysis Types Lookup" window will launch.
- Click on the type of dialysis the client receives.
- Click "Select" at the top.
- The window will close and your selection will be populated in the Medical Conditions Review.



*Note: An alternate method is to enter the data entry code in the "Dialysis Type" field, then press your "Enter" key. The data entry code for Hemodialysis is **15** and the data entry code for Peritoneal Dialysis is **16**.*

#### 4. Medical Conditions

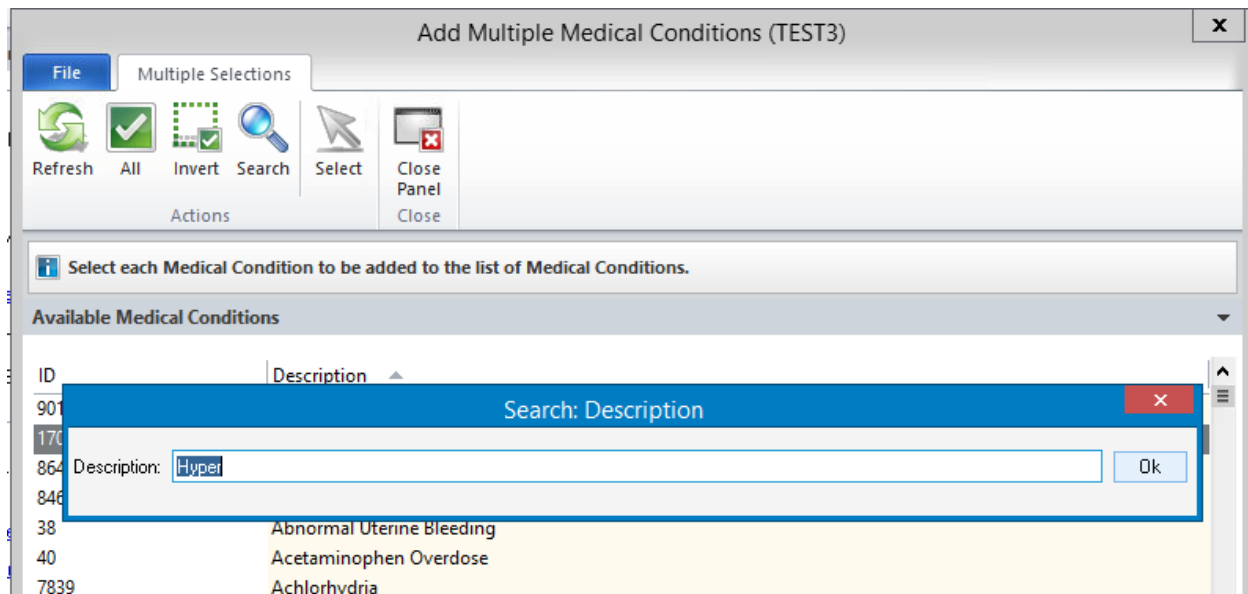


Indicate if there are no known medical conditions for the client by using your mouse to click on the check box in the lower left-hand corner of this container.

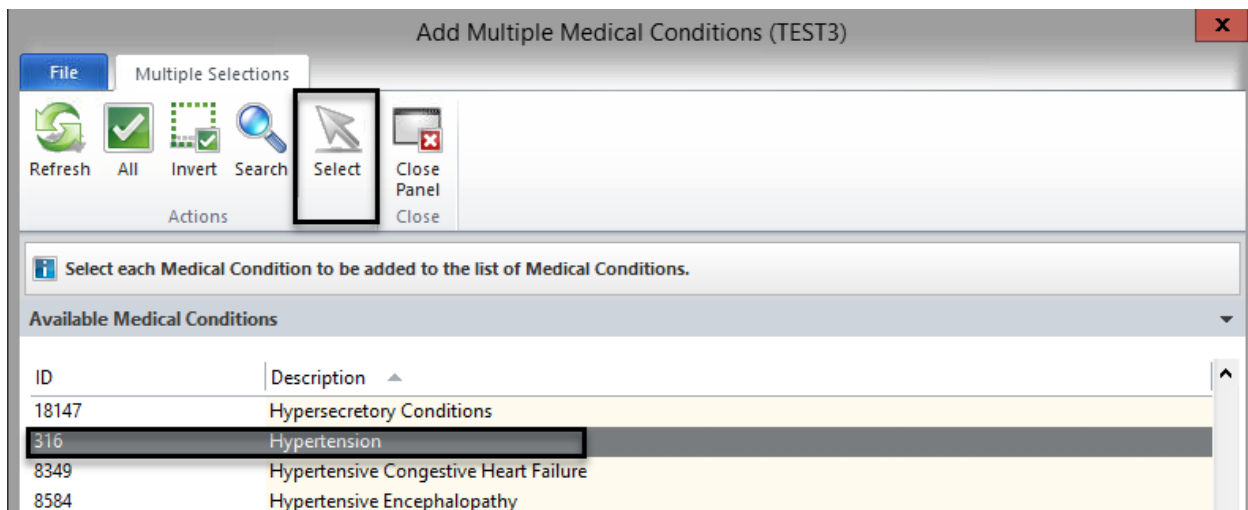
To select medical conditions for the client, use your mouse to click on the down arrow as indicated above. Select the "Add Medical Condition(s)" option.



A new window will launch. To search the list of medical conditions, select the “Search” button. The “Search Description” window appears. Enter as many letters of the condition as you would like. In this example, we typed “Hyper” to search for “Hypertension.” When finished typing, select the “Ok” button **or** press your “Enter” key.



The list of medical conditions is launched. Select the condition you were looking for by double clicking on it with your mouse (or single click on it and then choose “Select”).





The medical condition that you selected now populates in the Medical Conditions container.



**Note:** To select multiple medical conditions at one time, hold down your “Ctrl” key on the keyboard while using your mouse to point and click on the medical conditions in the list that you want to select.

**Deleting a Medical Condition:** Deleting a medical condition is easy. Select the condition you wish to delete by clicking on it with your mouse. Then, right click your mouse. The option “delete” is launched. Click on the word “Delete” and the medical condition will be removed.

## 5. Allergies: Adding a Medication Allergy

The process for adding allergies is very similar to that of adding the medical conditions for a client.

Indicate if there are no known allergies for the client by using your mouse to click on the check box in the lower left-hand corner of this container.

To select a medication allergy for the client, use your mouse to click on the down arrow as indicated. Select the “Add a Medication Allergy” option.



A new window will launch. Enter as much of the medication allergy as you want. In this example, “Ampi” was typed to search for “Ampicillin.” When finished typing, select the “Search” button **or** press “Enter.”

The medications that most closely match your search criteria will be displayed. Since the first medication is “Ampicillin” (the one we wanted), select it by either double clicking on it with your mouse **or** selecting the “Next” button, as indicated.

Another window launches for you to describe the type of allergic reaction the client experiences when taking this medication. In this example, we wrote “Skin rashes/hives.” Select the “Next” button as indicated.



When “Next” is selected, a confirmation window is launched.

This provides the opportunity to double check the accuracy of your selection. If the Medication and Allergy Reaction are correct, select the “Next” button as indicated.



*Note: If you need to make a correction, click on the hyperlink (or blue underlined words “Medication Description” or “Medication Allergy Reaction”). This will take you back a screen so you can correct any error before continuing.*

Once “Next” has been selected, you are taken back to the completed Medical Condition window. The allergy that was selected now populates in the Allergies container.

Name	Type	Reaction
ampicillin	Medication Allergy	<a href="#">Reaction</a>

☐ No Known Medication Allergies ☐ No Known Substance Allergies

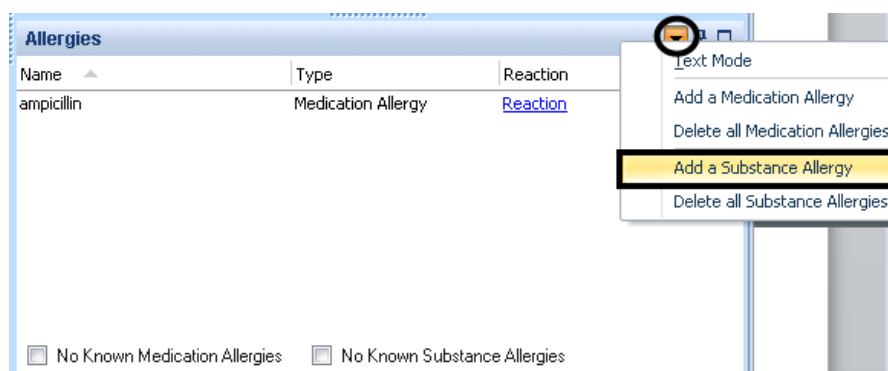
## 6. Allergies: Adding a Substance Allergy

Non-medication allergies are referred to in the DHP as “Substance Allergies.” The process for entering this information is nearly identical to adding a medication allergy.

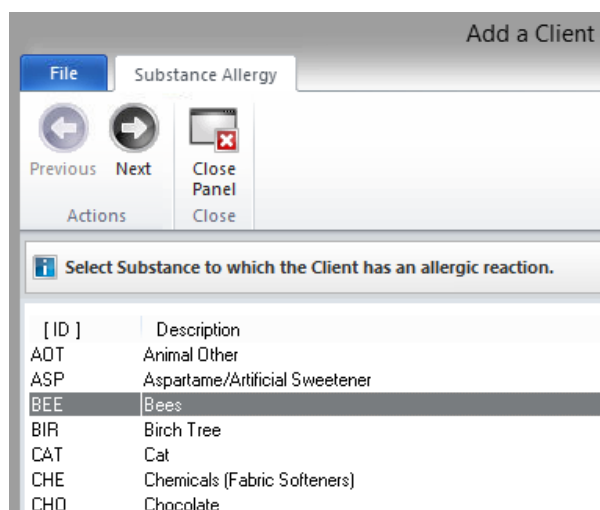
Indicate if there are no known substance allergies for the client by using your mouse to click on the check box in the bottom-center of this container.



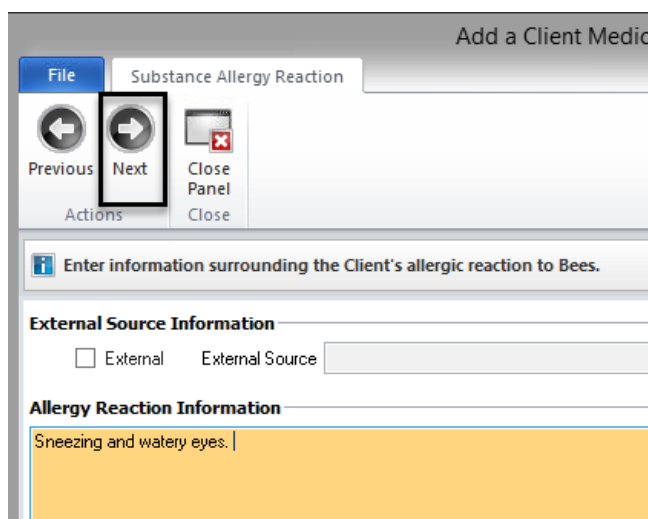
To select a substance allergy for the client, use your mouse to click on the down arrow as indicated below. Select the “Add a Substance Allergy” option.



A new window will launch. Select the substance that the client reports an allergic reaction to and select “Next.”



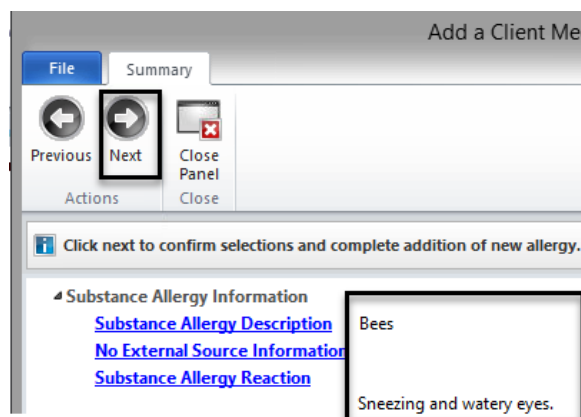
A new window will launch for you to describe the type of allergic reaction the client experiences when exposed to this substance. In this example, “Sneezing and watery eyes” was entered. Select “Next.”





When “Next” is selected, a confirmation window is launched.

This provides the opportunity to double check the accuracy of your selection. If the Substance and Allergy Reaction are correct, select the “Next” button as indicated.

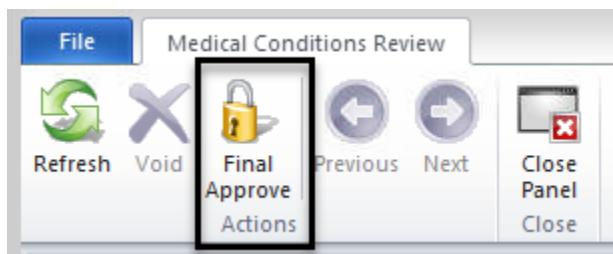


*Note: If you need to make a correction, click on the hyperlink (or blue underlined words “Substance Allergy Description” or “Substance Allergy Reaction”). This will take you back a screen so you can correct any error before continuing.*

*Also, Allergies is a required field. You must indicate at least one allergy or select the “No Known Allergies” checkbox in order to final approve the Medical Conditions form.*

Once “Next” has been selected, you are taken back to the completed Medical Condition window.

Your next step is to **final approve** the Medical Conditions Review you have just completed. Click your mouse on the “Final Approve” button as indicated.



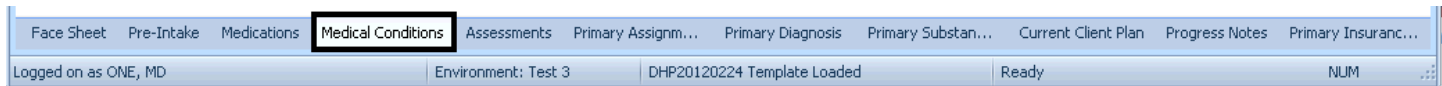
Enter your password and click “Ok.”



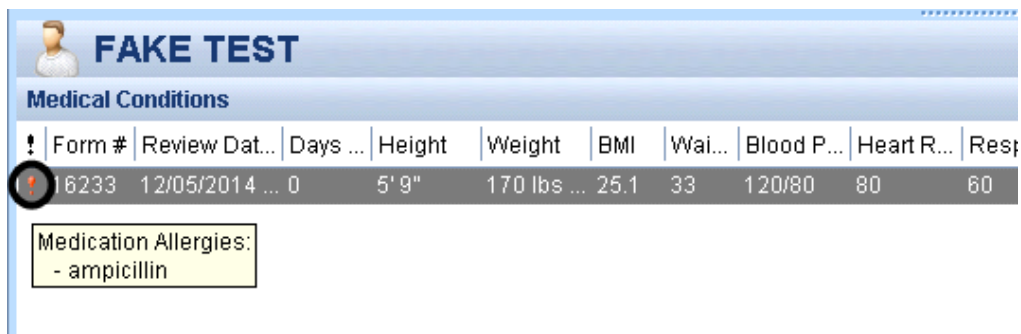


## Viewing a Final Approved Medical Conditions Review

1. With the Client Panel open, select the “Medical Conditions” pane at the bottom.



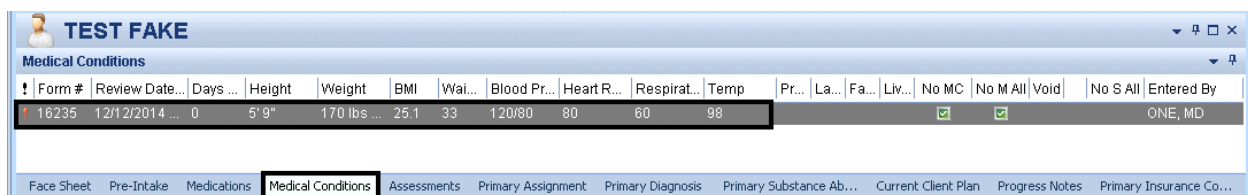
2. The client's general information and vital signs display for easy access. Notice on the extreme left there is a red exclamation point. Hover your cursor over this red exclamation point and any medication allergies, substance allergies, or medical conditions entered will be displayed.



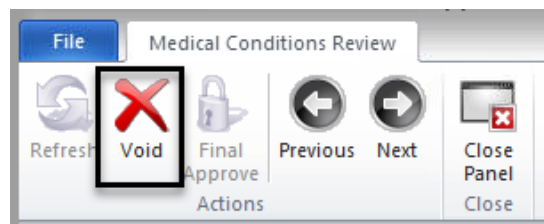
## Voiding a Final Approved Medical Conditions Review:

If you have entered a Medical Conditions Review in error (for example, you entered information for the wrong client) it is simple to void the information from the client's chart.

1. From the Medical Conditions pane in the Client Panel, double click on the Medical Conditions Review you wish to void.

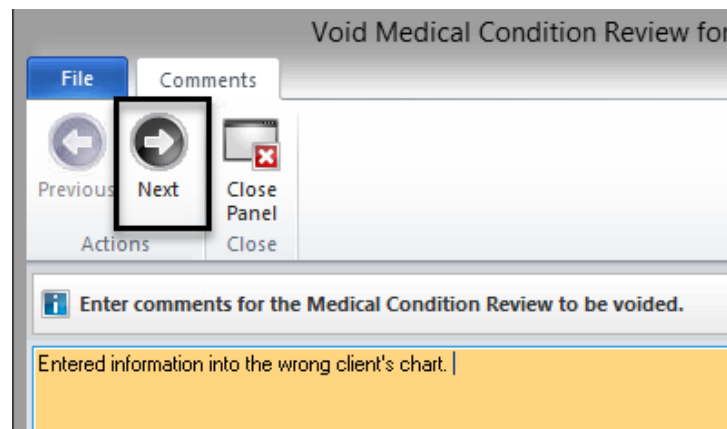


2. The Medical Conditions Review you selected will launch. Select the “Void” button on the ribbon.

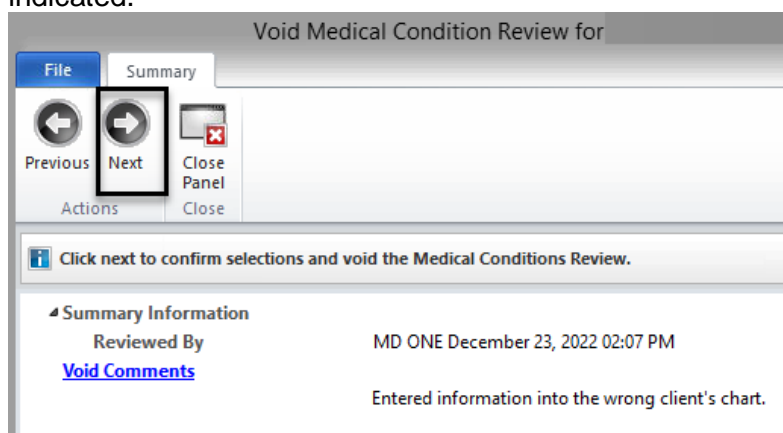




- This will launch a window for you to explain the reason for voiding the Medical Conditions Review. Once you have entered your narrative, select the “Next” button as shown.



- This launches a confirmation window. If the information is correct, select “Next” as indicated.



*Note: If you need to make a correction, click on the hyperlink (or blue underlined words “Void Comments”). This will take you back a screen so you can correct any error before continuing.*

- Enter your password and click “Ok.”



- The Medical Conditions Review has been voided. It will no longer be visible on the “Medical Conditions Review” tab of the Client Panel.



*Note: If you want to view the voided information, change the filter options on the “Medical Conditions” pane of the Client Panel. See the section “Filters on the Doctor’s Homepage” for detailed instructions.*



*Note: A reminder that if you are billing for a service, you still need to write a progress note.*



*Note: After you have received training in the DHP, all Medical Condition and Medication information is to be entered in the DHP and not in the Assessment forms. Remind non-medical staff at your programs to check the Medical Conditions Review and Medications tabs on their Clinician's Homepage for updated information.*

### **“Allergic Reaction” Documentation**

In the case that a client reports a previous medication allergy which is present in the client chart on the Safety Alert/Face Sheet or in Medication Allergies, and a medical staff determine through the evaluation process that the reported allergy does not meet the criteria for an allergic reaction (i.e. drowsiness, fatigue, upset stomach versus anaphylaxis shock, rash, severe vomiting, swelling), the current medical staff will retain the reported allergy in the client chart. The medical staff must update the reported allergy in the Medication Allergy on the Medical Conditions Pane of the Doctor's Homepage to maintain the client report with an update to the comments outlining the reported reaction to the medication. If the medication allergy is also reported on the Safety Alert, then the medical staff will update the Safety Alert outlining the reported reaction to the medication allergy. This will assure the most up to date and accurate information is in the client chart for medication allergies.

## **NOTES**

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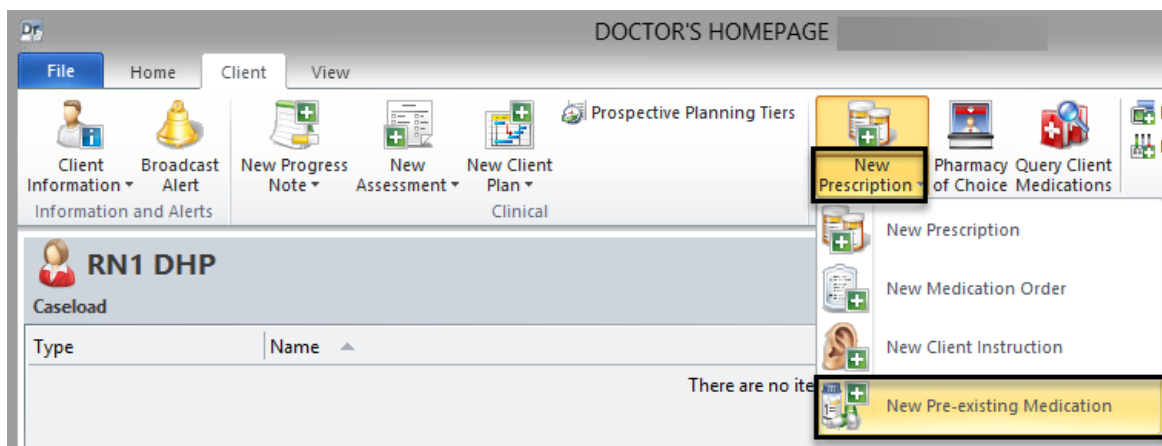
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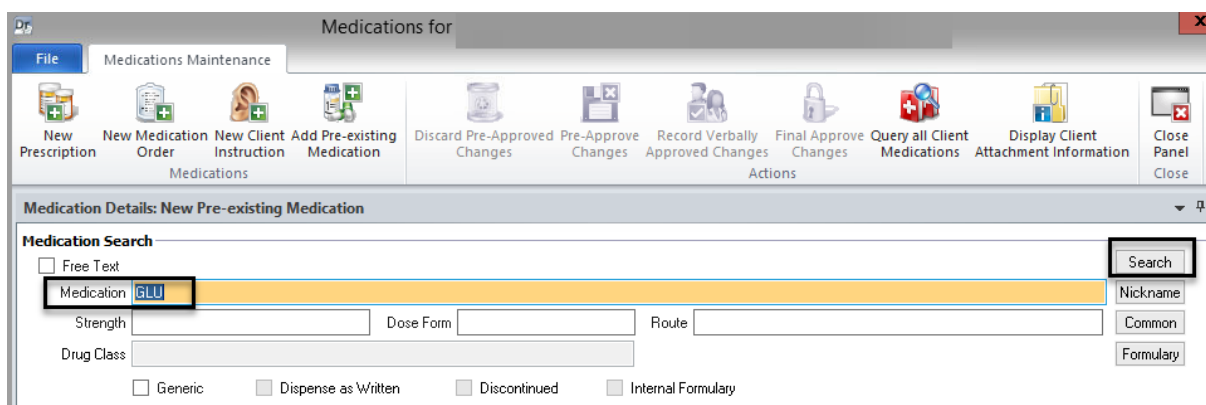
## ENTERING A NEW PRE-EXISTING MEDICATION

All user types (Prescribers, Non-Prescribers, and Clinical Support Staff) are able to enter and Final Approve Pre-existing Medication information.

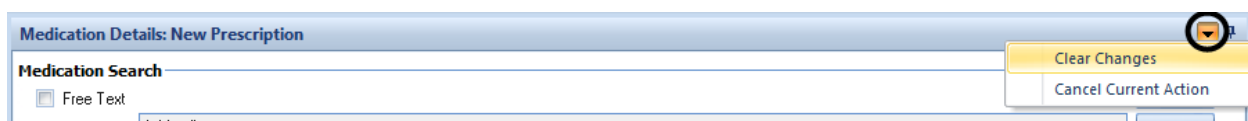
1. Select the appropriate client, and from the “Client” tab, click on the bottom part of the “New Prescription” button.
2. Click “New Pre-existing Medication.”



3. A new window launches. In the “Medication” field, type in the first few letters (at least three) of the pre-existing medication, and click “Search.” This launches the Multum database.



*Note: If the wrong medication is selected, choose the drop down arrow, and select “Clear Changes”.*





4. Locate the appropriate medication from the list, and double click on it, or single click on it and choose "Select."

**Medication Lookup**

File Lookup Panel

Select Close Panel

Actions Close

Click on the search button to perform a search for medications based on the criteria in the top section.

**Medication Search**

☒ Begins with ☐ Includes Medication  Search Nickname Clear

**Medication Query Filters**

Strength  Dose Form  Route

☐ Include Herbs only ☐ Include Vitamins only ☐ Include IV Medications only ☐ Include Obsolete Medications

**Include Only**

☒ All ☐ Generic Names ☐ Brand Names ☐ Generic Products ☐ Brand Products

**Medication List**

Medication	Type	Trans...	O...
Glucophage	Brand Name		
Glucophage 1000 mg oral tablet	Brand Product		
<b>Glucophage 500 mg oral tablet</b>	<b>Brand Product</b>		
Glucophage 850 mg oral tablet	Brand Product		
Glucophage XR	Brand Name		
Glucophage XR 500 mg oral tablet, extended release	Brand Product		
Glucophage XR 750 mg oral tablet, extended release	Brand Product		
glucosamine	Generic Name		
glucosamine 1000 mg oral capsule	Generic Product		

5. Once the medication has been selected, a new window launches. Enter the appropriate information into the "Sig Builder" and "Sig Information" fields. The start date is required field. If the exact start date is unknown, provide the best estimate, and check the "Estimated Dates" box. If prescribed by an external provider, check the "External" check box and enter the name of the physician in the "Prescribing Physician" field. When finished, select "Save."

**Sig Builder**

☐ Free Text

Action	Dose Qty	Unit	Route	Frequency
Take		tablet(s)	by mouth	

Modifiers

**Sig Information**

Sig Take tablet(s) by mouth

Days Supply  Qty To Dispense  Unit

Start Date  End Date  Earliest Fill Date  Refills  ☐ Estimated Dates

Add Instructions

☒ External Prescribing Physician

Internal Notes

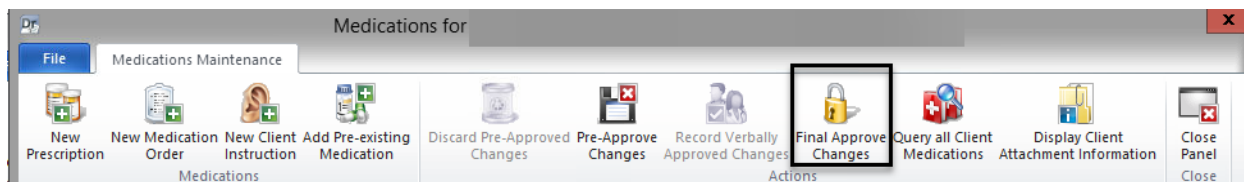
Written Date

Issue Method **Do Not Send: N/A**

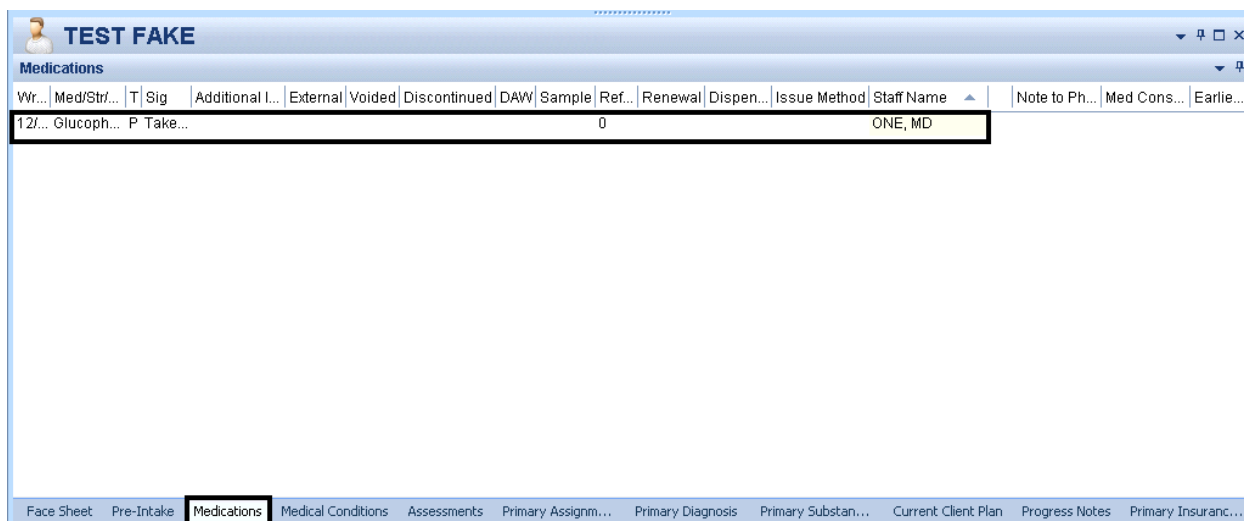
Save Cancel



6. Click the “Final Approve Changes” button.



7. The pre-existing medication then displays in the “Medications” pane of the Client Panel.



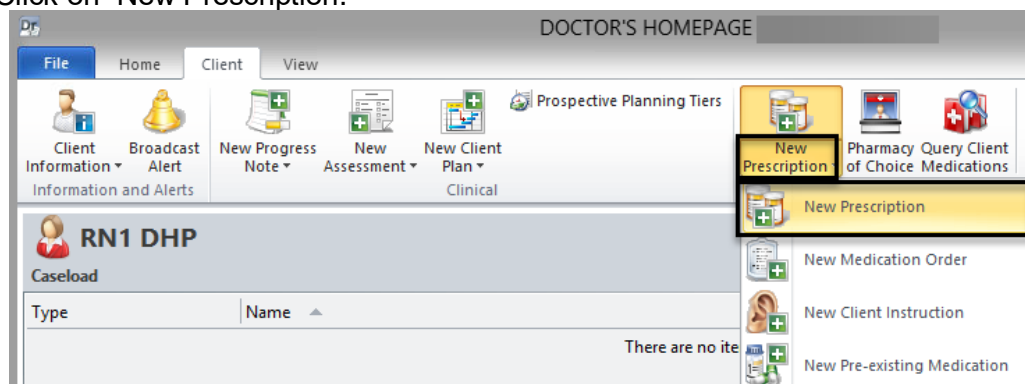
## NOTES



## ENTERING A NEW PRESCRIPTION

All user types (Prescribers, Non-Prescribers, and Clinical Support Staff) can enter new prescription information and follow the same basic steps. However, **ONLY** Prescribers can final approve a new prescription. Non-Prescribers will need a co-signature by a Prescriber who will final approve the new prescription. Clinical Support Staff will “stage” the entry of the new prescription and the Prescriber will edit, final approve “as is,” or delete, as appropriate. Follow the steps below based on your user type, to enter a new prescription.

1. Select the appropriate client, and from the “Client” tab, click on the bottom part of the “New Prescription” button.
2. Click on “New Prescription.”



3. The “Medication Details” window launches. In the “Medication” field, type in the first few letters (at least three) of the new prescription, and click “Search.”



- The “Medications List” launches. Locate the appropriate medication from the list and double click on it, or single click on it and choose “Select” at the top.



*Note: Once a Prescriber has used the system for a while, the 20 most commonly prescribed medications will be listed by selecting the “Common” button. This is a convenient way to search for the medications prescribed most frequently.*

- Select the “Common” button.



- A new window is launched. Highlight the desired medication and choose “Select.”

Medication	Type	Count
Xanax 1 mg oral tablet	60 - Brand Product	1
Ativan 1 mg oral tablet	60 - Brand Product	1
BuSpar	60 - Brand Product	1
<b>Zoloft 100 mg oral tablet</b>	60 - Brand Product	1
RisperDAL	60 - Brand Product	1
Tylenol	60 - Brand Product	1

5. A new window launches. Enter the appropriate information in the “Sig Builder” and “Sig Information” fields.

**Sig Builder**

☐ Free Text

Action	Dose Qty	Unit	Route	Frequency
Take		tablet(s)	by mouth	

Modifiers

**Sig Information**

Sig Take tablet(s) by mouth

Days Supply	Qty To Dispense	Unit	Tablet(s)
		TAB	

Start Date 12/08/2014 End Date / / Earliest Fill Date / / Refills ☐ Estimated Dates ☐

Note to Pharmacy

☐ External Prescribing Physician

Internal Notes

Written Date 12/08/2014



*Note: If the “Days Supply” field is left blank, the “Qty To Dispense” field is manually calculated. This method does not auto calculate an “End Date” and is recommended if your practice is to refill a medication prior to when the prescription expires.*

*Also of note, The “Note to Pharmacy” is seen by the pharmacy, but the “Internal Notes” are only seen by clinical staff. The “Internal Notes” will not show in a printed or transmitted prescription. As there is no spell check feature, please type carefully.*

6. The issue method must be selected before saving the medication. If medications are batched before final approval, the issue method must be selected for each medication individually. The selected issue method on the first medication will be defaulted for subsequent medications of the same type (medication order, client instruction, pre-existing medication...) until changed.



The options are:

- Transmit – if the client has saved pharmacies of choice, the preferred pharmacy is defaulted as the issue method for new prescriptions. If you open the issue method selections, the preferred pharmacy is at the top of the list with a gold star beside it and all other pharmacies are listed below it.

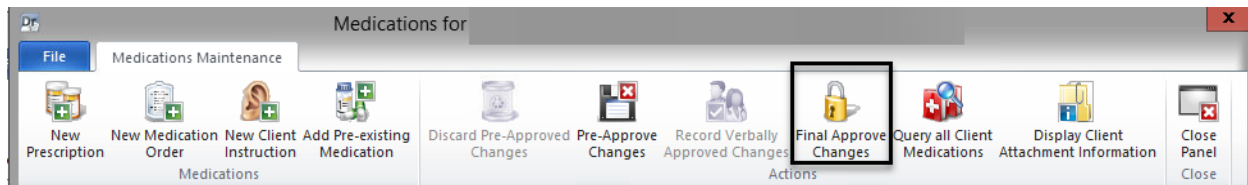
- Print – if a prescription printer has been saved in the staff preferences, it will be listed on the left. If a printer has not selected as the default for prescription printing, click on the arrow and all available printers will be listed.

- Do Not Send – these options include: Hand Written, Called In, and Samples Given.

7. After the Issue Method has been selected, select “Save.”



8. If you are a **Prescriber**, click “Final Approve Changes.”

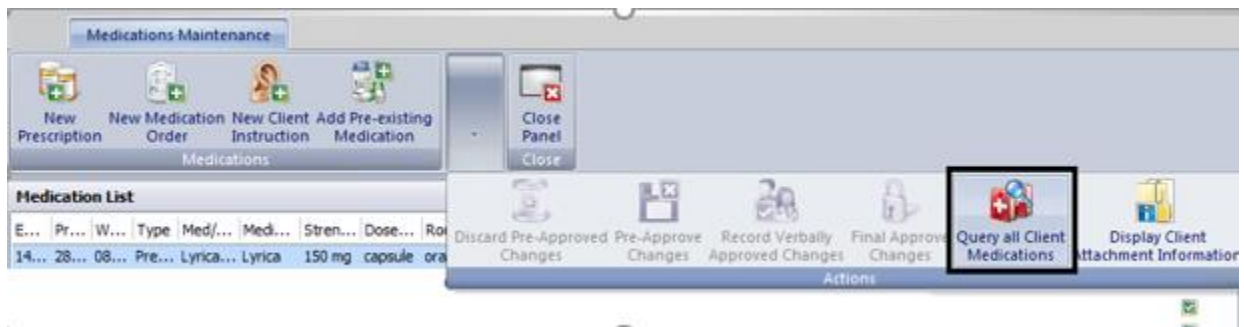


*Note: Clinical Support Staff will “Pre-Approve Changes.” See the “Pre-Approve Changes to a New Prescription (Clinical Support Staff)” section.*



*Note: Non-Prescribers will need a co-signature. See the “Non-Prescriber Co-Signature Process.”*

9. Once you select “Final Approve Changes,” the medication query is run automatically. If you need to view the information that is provided in the “Informational,” “Reference Literature” or “Usual Dose” section, a medication query must be performed manually in the “Medications Maintenance” screen with the “Query all Client Medications” button.



*Note: A final approved medication **cannot** be edited! It would have to be voided or discontinued and re-entered. Make sure to double check the prescriptions are correct before selecting “Sign.” A pre-approved medication can be edited only until final approved.*



Results for:

File Query Medication Results

Print Leaflet Save and Close Close Panel

Results from the Query ran by RN1 DHP on 01/06/2023 at 03:40 PM.

Query Results

Alerts

Informational

Reference Literature

Usual Dose

Leaflets

Currently Viewing Information for Alerts

Medication	Trigger	Severity	Plausibility	Type
PROzac	Wellbutrin XL	1 - Major Alert		Medication Interacti...
PROzac	Zoloft	1 - Major Alert		Medication Interacti...
Wellbutrin XL	Haldol Decanoate	1 - Major Alert		Duplicate Therapies
Wellbutrin XL	Haldol Decanoate	1 - Major Alert		Medication Interacti...

General

MONITOR CLOSELY: The use of bupropion is associated with a dose-related risk of seizures. The risk may be further increased when coadministered with other agents that can reduce the seizure threshold, including antidepressants, CNS stimulants, acetylcholinesterase inhibitors, phenothiazines, and dopaminergic blocking agents such as neuroleptics and metoclopramide. These agents are often individually epileptogenic and may have additive effects when combined. The estimated incidence of seizures is approximately 0.4% for immediate-release bupropion hydrochloride at dosages between 300 to 450 mg/day (equivalent to 348 to 522 mg/day of bupropion hydrobromide), but increases almost tenfold between 450

Details

Alert Acknowledgement Comments

10. If there is a "Major Alert," type in the "Alert Acknowledgement Comments" field. Select "Save and Close."

11. On the "Medication Changes" screen, selecting "Sign" will constitute as final approval and will transmit or print the medications.

Medication Changes for TEST DHP CRASH 1153 Male Born: 02/21/1986 (TRAIN)

File

Client

Allergies: penicillin V potassium, Bees

Prescriber: RN1 DHP

Phone: Fax:

NPI: 0

Alerts: 6 Major 1 Minor 11 Moderate 5 General

Hand Written

Wellbutrin 100 mg tablet

Take 1 tablet(s) by mouth 1 time a day

#30 Tablet(s), Refills: 0, DAW: No, Date Written: 01/06/2023

Do Not Send

New Prescription

Sign

12. The new prescription then displays in the "Medications" pane of the Client panel.

TEST FAKE

Medications

W...	Med/Str/DF	T Sig	Addition...	External	Voided	Discontinued	DAW	Sample R...	Renewal	Disp...	Issue Met...	Staff Name	Note to ...	Med Con...	Earli...
12...	Glucopha...	P Take 1 ta...						0				ONE, MD			
12...	Wellbutrin...	P Take 1 ta...						0		30 / T...		ONE, MD			

Face Sheet Pre-Intake Medications Medical Condi... Assessments Primary Assign... Primary Diagn... Primary Subst... Current Client ... Progress Notes Primary Insura...



## GENERIC MEDICATIONS

You can prescribe either generic or brand name medications via the DHP. If you know the generic name of the medication, simply search by that as you did other medication searches.

For example, we entered “Fluox” to search for generic medication, “Fluoxetine.” The medication list displayed shows the generic name title “Fluoxetine” as well as the specific dosages for the generic product.

Medication List			
Medication	Type	Transmit	O...
FLUoxetine	Generic Name		
FLUoxetine 10 mg oral capsule	Generic Product	<input checked="" type="checkbox"/>	
FLUoxetine 10 mg oral tablet	Generic Product	<input checked="" type="checkbox"/>	
FLUoxetine 15 mg oral tablet	Generic Product		
FLUoxetine 20 mg oral capsule	Generic Product	<input checked="" type="checkbox"/>	
FLUoxetine 20 mg oral tablet	Generic Product	<input checked="" type="checkbox"/>	

Right click on the generic name title; there is an option to show associated medications.

Medication List			
Medication	Type	Transmit	O...
FLUoxetine	Generic Name		
FLUoxetine 10 mg oral capsule	Generic Product		
FLUoxetine 10 mg oral tablet	Generic Product		
FLUoxetine 15 mg oral tablet	Generic Product		
FLUoxetine 20 mg oral capsule	Generic Product	<input checked="" type="checkbox"/>	
FLUoxetine 20 mg oral tablet	Generic Product	<input checked="" type="checkbox"/>	

The search is run again, and this time the medications list will show associated brand name products.

Medication List			
Medication	Type	Transmit	O...
FLUoxetine 40 mg oral capsule	Generic Product	<input checked="" type="checkbox"/>	
FLUoxetine 60 mg oral tablet	Generic Product	<input checked="" type="checkbox"/>	
FLUoxetine 90 mg oral delayed release capsule	Generic Product	<input checked="" type="checkbox"/>	
FLUoxetine compounding powder	Generic Product		
PROzac	Brand Name		
PROzac 10 mg oral capsule	Brand Product	<input checked="" type="checkbox"/>	



While the generic medication will show associated brand names in the Multum database, the brand names do not show associated generic medications.

In the event that you want to prescribe a generic medication and do not know the generic name, you can enter the brand name and in the “Note to Pharmacy” field and enter the instruction “Use generic.”

**Medication Search**

☐ Free Text

Medication: PROzac

Strength: 10 mg Dose Form: capsule Route: oral

Drug Class:

☐ Generic ☐ Dispense as Written ☐ Sample ☐ Discontinued ☐ Internal Formulary

**Sig Builder**

☐ Free Text

Action	Dose Qty	Unit	Route	Frequency
Take	1	capsule(s)	by mouth	1 time a day and at night

Modifiers:

**Sig Information**

Sig: Take 1 capsule(s) by mouth 1 time a day and at night

Days Supply: Qty To Dispense: 30 Unit: CAP Capsule(s)

Start Date: 12/12/2014 End Date: / / Earliest Fill Date: / / Refills: ☐ Estimated Dates: ☐

Note to Pharmacy: Use generic

☐ External Prescribing Physician:



*Note: If using the above method for prescribing a generic medication, it is important that you leave the “Dispense as Written” check box blank.*

**Medication Search**

☐ Free Text

Medication: PROzac

Strength: 10 mg Dose Form: capsule Route: oral

Drug Class:

☐ Generic ☐ Dispense as Written ☐ Sample ☐ Discontinued ☐ Internal Formulary

**Sig Builder**



## MAJOR ALERTS

Each time a medication query is run during a new prescription process, you will receive alerts about the medication. They rank in the following order:

1. **Major Alert – Red – Requires an acknowledgement from the Prescriber (in the “Alert Acknowledgement Comments” field). Can be brief but should be substantive. Document your rationale for prescribing the medication in light of the Major Alert. In the event that something happened to the client, you want your documentation to be clear. You cannot complete the new prescription until a Major Alert has been acknowledged.**
2. Moderate Alert- Blue
3. Minor Alert – Yellow
4. General Warning – Yellow
5. No Literature Available – Green

Results for:  

**File** Query Medication Results

Print Leaflet Save and Close Close Panel

Results from the Query ran by RN1 DHP on 01/11/2023 at 10:38 AM.

Query Results	Currently Viewing Information for Alerts		
	Medication	Trigger	Severity ▲ Plausibility Type
Alerts	Glucophage	Food	1 - Major Alert <span style="color: red;">▲</span> Medication to Food Interaction
Informational	Wellbutrin	Food	2 - Moderate Alert <span style="color: blue;">▲</span> Medication to Food Interaction
Reference Literature	Glucophage		4 - General Warni... <span style="color: yellow;">▲</span> General Warning / Contraindication
Usual Dose	Wellbutrin		4 - General Warni... <span style="color: yellow;">▲</span> General Warning / Contraindication
Leaflets			

**General**

GENERALLY AVOID: Alcohol can potentiate the effect of metformin on lactate metabolism and increase the risk of lactic acidosis. In addition, alcohol may cause hypoglycemia or hyperglycemia in patients with diabetes. Although hypoglycemia rarely occurs during treatment with metformin alone, the risk may increase with acute consumption of alcohol. Even modest amounts can lower blood sugar significantly, especially when the alcohol is ingested on an empty stomach or following exercise. The mechanism involves inhibition of both gluconeogenesis as well as the counter-regulatory response to hypoglycemia. Episodes of hypoglycemia may last for 8 to 12 hours after ethanol ingestion. By contrast, chronic alcohol abuse can cause impaired glucose tolerance and hyperglycemia. Moderate alcohol consumption generally does not affect blood glucose levels in

**Details**

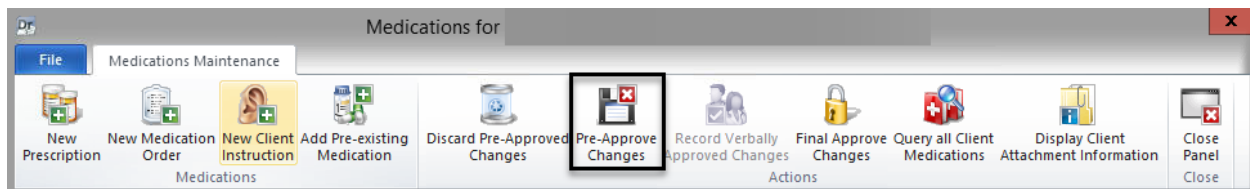
**Alert Acknowledgement Comments**



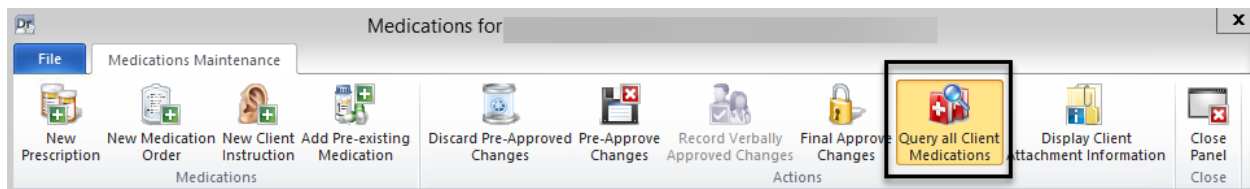
## **PRE-APPROVING CHANGES TO A NEW MEDICATION (CLINICAL SUPPORT STAFF)**

Clinical Support Staff will “Pre-Approve Changes” instead of “Final Approve Changes.”

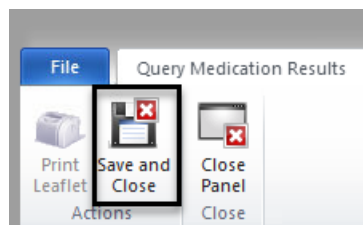
1. Click on the “Pre-Approve Changes” button.



2. Once you select “Pre-Approve Changes,” the medication query is run automatically. If you need to view the information that is provided in the “Informational,” “Reference Literature,” or “Usual Dose” section, a medication query must be performed manually in the “Medications Maintenance” screen with the “Query all Client Medications” button.



3. Select “Save and Close.”



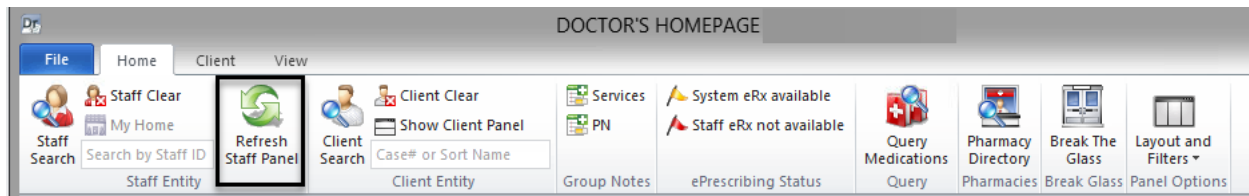
4. Enter any pre-approval comments as necessary and select “Save.”



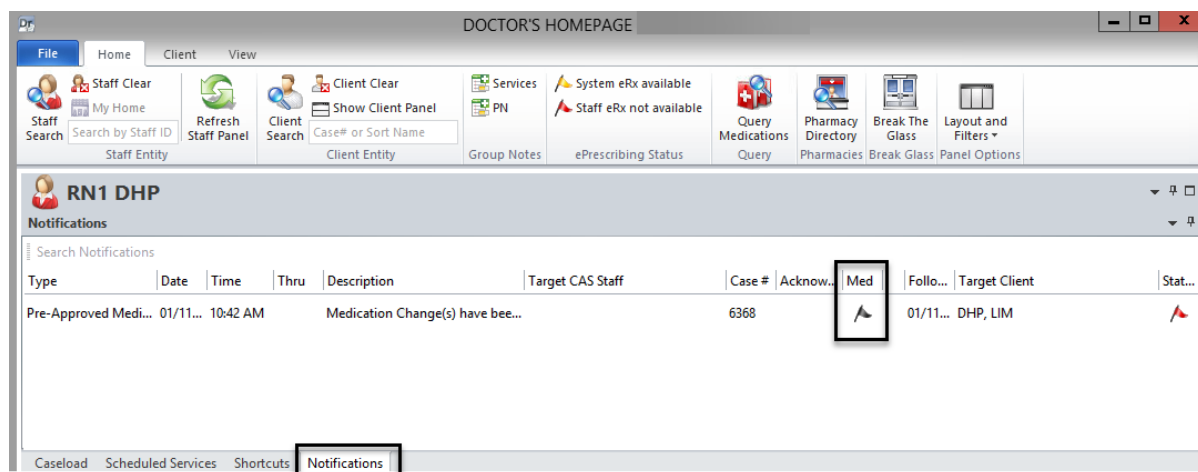


## **PRESCRIBERS: FINAL APPROVING A PRE-APPROVED MEDICATION**

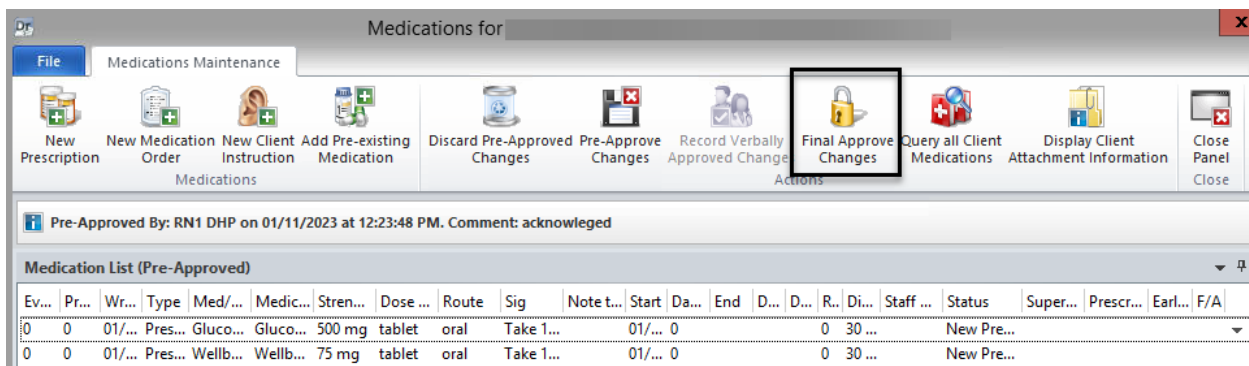
1. Under the “Home” tab, click “Refresh Staff Panel”



2. In the Notifications pane of the staff panel, a black flag will appear in the “Med” column for that client. Double click on the line.



3. A new window launches. Review the medication and select “Final Approve Changes.”





Results from the Query ran by RN1 DHP on 01/11/2023 at 12:23 PM.

**Query Results**

Alerts	Medication	Trigger	Severity	Plausibility	Type
Informational	Glucophage	Food	1 - Major Alert		Medication to Food Interaction
Reference Literature	Wellbutrin	Food	2 - Moderate Alert		Medication to Food Interaction
Usual Dose	Glucophage		4 - General Warni...		General Warning / Contraindication
Leaflets	Wellbutrin		4 - General Warni...		General Warning / Contraindication

**General**

GENERALLY AVOID: Alcohol can potentiate the effect of metformin on lactate metabolism and increase the risk of lactic acidosis. In addition, alcohol may cause hypoglycemia or hyperglycemia in patients with diabetes. Although hypoglycemia rarely occurs during treatment with metformin alone, the risk may increase with acute consumption of alcohol. Even modest amounts can lower blood sugar significantly, especially when the alcohol is ingested on an empty stomach or following exercise. The mechanism involves inhibition of both gluconeogenesis as well as the counter-regulatory response to hypoglycemia. Episodes of hypoglycemia may last for 8 to 12 hours after ethanol ingestion. By contrast, chronic alcohol abuse can cause impaired glucose tolerance and hyperglycemia. Moderate alcohol consumption generally does not affect blood glucose levels in

**Details**

**Alert Acknowledgement Comments**

4. If there is a "Major Alert," type in your comments in the "Alert Acknowledgement Comments" field. Select "Save and Close."

5. On the "Medication Changes" screen, selecting "Sign" will constitute as final approval.

Medication Changes for

**Client**

., SAN DIEGO, CA 92108 Home: Work:  
Gender: Male DOB: 01/01/1990 Age: 33 year(s) Height: Weight:  
Allergies: No Medical Condition Review entered

**Prescriber**  
RN1 DHP NPI: 0 Alerts: 1 Major 0 Minor 1 Moderate 2 General

**Hand Written** Do Not Send

**Glucophage 500 mg tablet**  
Take 1 tablet(s) by mouth  
#30 Tablet(s), Refills: 0, DAW: No, Date Written: 01/11/2023 New Prescription

**Wellbutrin 75 mg tablet**  
Take 1 tablet(s) by mouth  
#30 Tablet(s), Refills: 0, DAW: No, Date Written: 01/11/2023 New Prescription

**Sign**

6. The new prescription then displays in the "Medications" pane of the Client Panel.

**Medications**

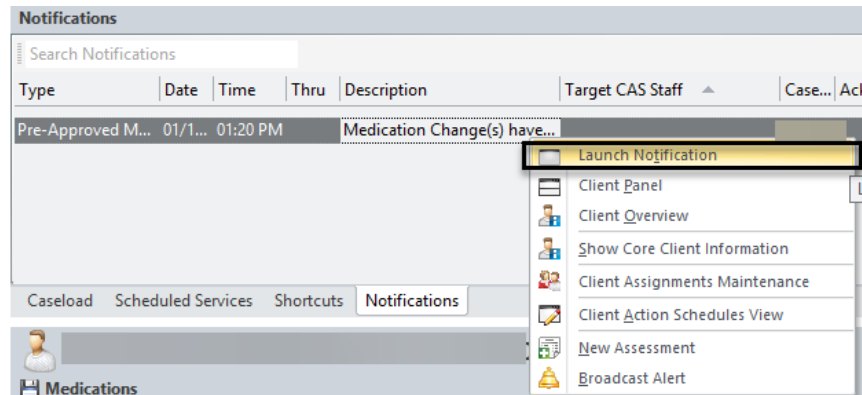
W...	Med/S...	T	Sig	Addition...	External	Voided	Discontinued	DAW	Sample	Re...	Renewal	Dispe...	Issue Met...	Staff Name	Note to ...	Med Co...	Earlie...	F/A
01...	Glucop...	P	Tak...						0		30 / T...	Hand Writ...	RN1 DHP					✓
01...	Wellbu...	P	Tak...						0		30 / T...	Hand Writ...	RN1 DHP					✓

Face Sheet Pre-Intake **Medications** Medical C... Assessme... Assignme... Diagnoses Substance ... Client Plans Progress N... Insurance ... Client Atta...

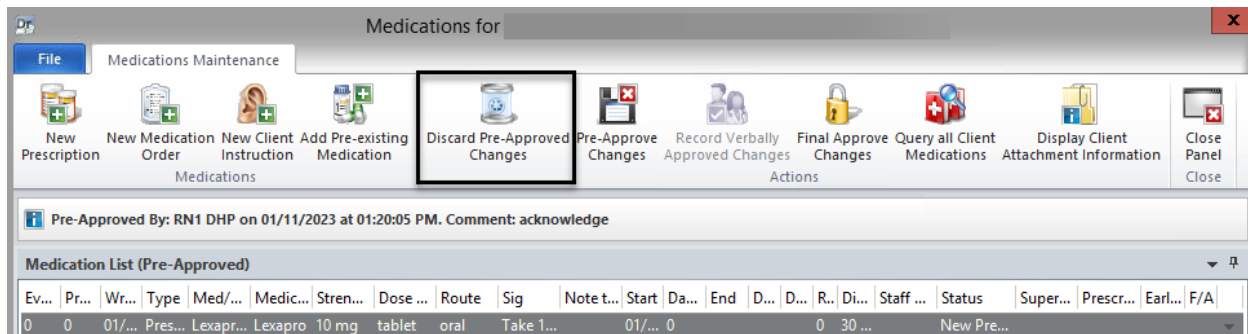


## DISCARDING PRE-APPROVED CHANGES

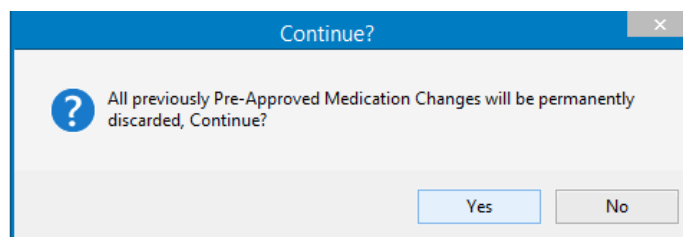
1. You will receive notification that pre-approved medication changes are awaiting final approval on your “Notifications” pane. Double click on the line, or right click on the line and choose “Launch Notification.”



2. If you do not agree with the pre-approved medication staged by the Clinical Support Staff, click “Discard Pre-Approved Changes” instead of “Final Approve Changes.”

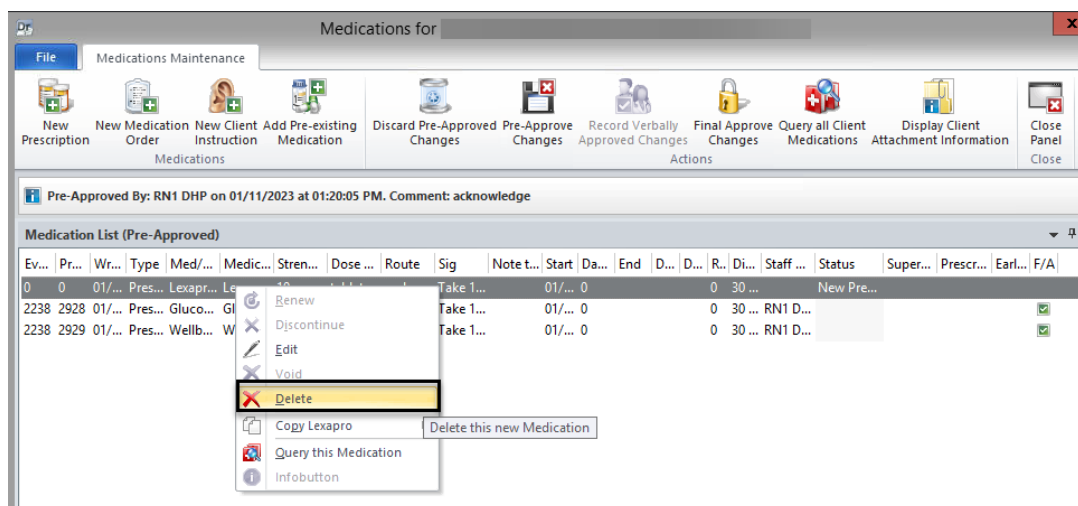


3. The following message appears: If you want to discard ALL pre-approved medication changed staged by the Clinical Support Staff, click “Yes.”

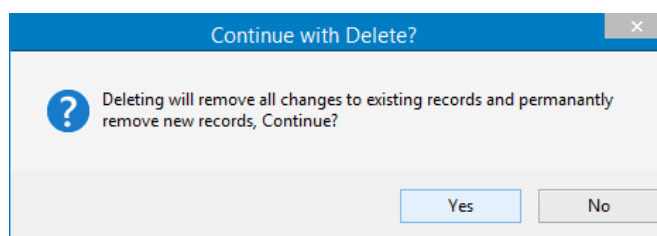


If you wish to discard only one from several pre-approved medications that have been staged for you, follow these steps:

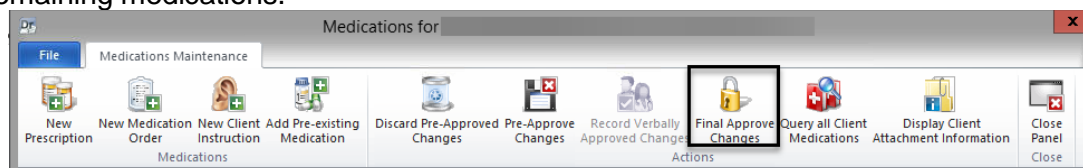
1. Right click on the pre-approved medication you wish to discard. A drop down menu is launched. Select the “Delete” option.



2. The following message appears. Select “Yes.”



3. The single pre-approved medication will be removed and you can final approve the remaining medications.



4. If there is a “Major Alert,” type in the “Alert Acknowledgement Comments” field. Select “Save and Close.”



Results for:

File Query Medication Results

Print Leaflet Save and Close Close Panel Close

Results from the Query ran by RN1 DHP on 01/11/2023 at 01:19 PM.

Query Results

Currently Viewing Information for Alerts

Medication	Trigger	Severity	Plausibility	Type
Glucophage	Food	1 - Major Alert		Medication to Food Interaction
Wellbutrin		1 - Major Alert		Duplicate Therapies
Wellbutrin	Lexapro	1 - Major Alert		Medication Interaction
Wellbutrin	Food	2 - Moderate Alert		Medication to Food Interaction

**General**

GENERALLY AVOID: Alcohol can potentiate the effect of metformin on lactate metabolism and increase the risk of lactic acidosis. In addition, alcohol may cause hypoglycemia or hyperglycemia in patients with diabetes. Although hypoglycemia rarely occurs during treatment with metformin alone, the risk may increase with acute consumption of alcohol. Even modest amounts can lower blood sugar significantly, especially when the alcohol is ingested on an empty stomach or following exercise. The mechanism involves inhibition of both gluconeogenesis as well as the counter-regulatory response to hypoglycemia. Episodes of hypoglycemia may last for 8 to 12 hours after ethanol ingestion. By contrast, chronic alcohol abuse can cause impaired glucose tolerance and hyperglycemia. Moderate alcohol consumption generally does not affect blood glucose levels in

**Details**

Alert Acknowledgement Comments

5. On the “Medication Changes” screen, selecting “Sign” will constitute as final approval and will transmit or print the medications.

Medication Changes for

File

Client

., SAN DIEGO, CA 92108 Home: Work:

Gender: Male DOB: 01/01/1990 Age: 33 year(s) Height: Weight:

Allergies: **No Medical Condition Review entered**

Prescriber

RN1 DHP NPI: 0

Phone: Fax:

Alerts 0

3 Major 0 Minor

2 Moderate 3 General

**Called in to Pharmacy** Do Not Send

**Lexapro 10 mg tablet**

Take 1 tablet(s) by mouth

#30 Tablet(s), Refills: 0, DAW: No, Date Written: 01/11/2023

New Prescription

Sign

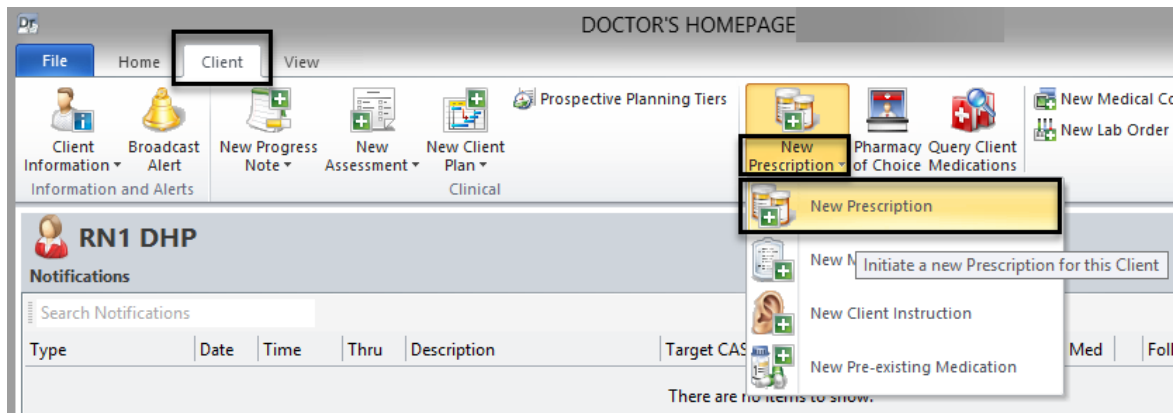


## **BATCHING PRESCRIPTIONS**

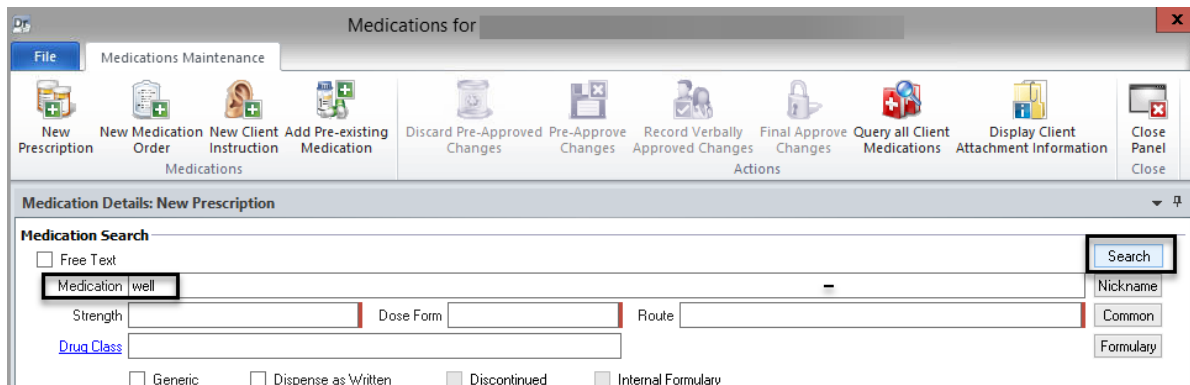
Often times, more than one new prescription is prescribed for a client at a time. In this instance, the prescriptions may be “batched.”

To “batch” (prescribe more than one medication at a time):

1. Select the appropriate client, and from the “Client” tab, click on the bottom part of the “New Prescription” button.
2. For the first medication, select “New Prescription.”



3. In the “Medication” field, type in the first few letters (at least three) of the new prescription, and click “Search.”





4. Locate the appropriate medication from the list, and double click on it, or select it and choose “Select” at the top.

**Medication Lookup**

File Lookup Panel

Select Close Panel Close

Click on the search button to perform a search for medications based on the criteria in the top section.

**Medication Search**

☒ Begins with ☐ Includes Medication well Search Nickname Clear

**Medication Query Filters**

Strength Dose Form Route

☐ Include Herbs only ☐ Include Vitamins only ☐ Include IV Medications only ☐ Include Obsolete Medications

Include Only ☒ All ☐ Generic Names ☐ Brand Names ☐ Generic Products ☐ Brand Products

**Medication List**

Medication	Type	Trans...	O...
Wellbutrin 75 mg oral tablet	Brand Product		
Wellbutrin SR	Brand Name		
Wellbutrin SR 100 mg/12 hours oral tablet, extended release	Brand Product	<input checked="" type="checkbox"/>	
Wellbutrin SR 150 mg/12 hours oral tablet, extended release	Brand Product	<input checked="" type="checkbox"/>	
Wellbutrin SR 200 mg/12 hours oral tablet, extended release	Brand Product	<input checked="" type="checkbox"/>	

5. Enter the appropriate information in the “Sig Builder” and the “Sig Information” fields; select the “Issue Method,” and select “Save.”

**Sig Builder**

Free Text Action Dose Qty Unit Route Frequency

Take 1 tablet(s) by mouth

Modifiers

**Sig Information**

Sig Take 1 tablet(s) by mouth

Days Supply Qty To Dispense 90 Unit TAB Tablet(s)

Start Date 09/21/2015 End Date / / Earliest Fill Date / / Refills ☐ Estimated Dates

Note to Pharmacy

☐ External Prescribing Physician

Internal Notes

Written Date 09/21/2015

Issue Method [Print: Adobe PDF \(from LH7U0CNU3489JN3\) in session 20](#) Save Cancel

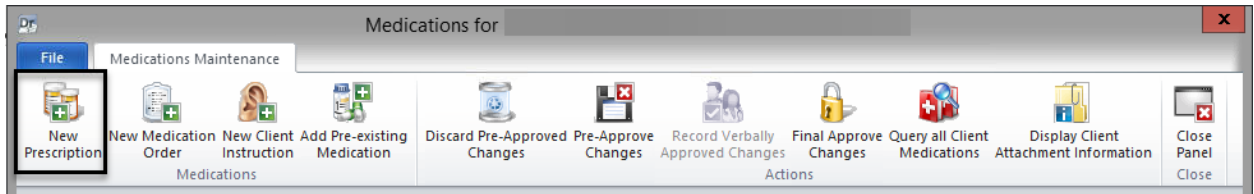
Medication List Medication Details: New Prescription



*Note: The “Note to Pharmacy” is seen by the pharmacy, but the “Internal Notes” are only seen by clinical staff. The “Internal Notes” will not show in a printed or transmitted prescription.*



6. To enter the second medication, click on the “New Prescription” button.



7. In the “Medication” field, type in the first few letters (at least three) of the new prescription, and click “Search.”

8. Locate the appropriate medication from the list, and double click on it, or select it and choose “Select” at the top.

Medication	Type	Trans...	O...
haloperidol 10 mg oral tablet	Generic Product	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
haloperidol 2 mg oral tablet	Generic Product	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
haloperidol 2 mg/mL oral concentrate	Generic Product	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
haloperidol 20 mg oral tablet	Generic Product	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
haloperidol 5 mg oral tablet	Generic Product	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
haloperidol 5 mg/mL injectable solution	Generic Product	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>



9. Enter the appropriate information in the “Sig Builder” and the “Sig Information” fields; select the “Issue Method,” and then select “Save.”

**Sig Builder**

☐ Free Text

Action	Dose Qty	Unit	Route	Frequency
Take	1	tablet(s)	by mouth	

**Sig Information**

Sig: Take 1 tablet(s) by mouth

Days Supply:  Qty To Dispense:  90 Unit: **TAB** Tablet(s)

Start Date: 09/21/2015 End Date:  /  /  Earliest Fill Date:  /  /  Refills:  ☐ Estimated Dates

Note to Pharmacy:

☐ External Prescribing Physician:

Internal Notes:

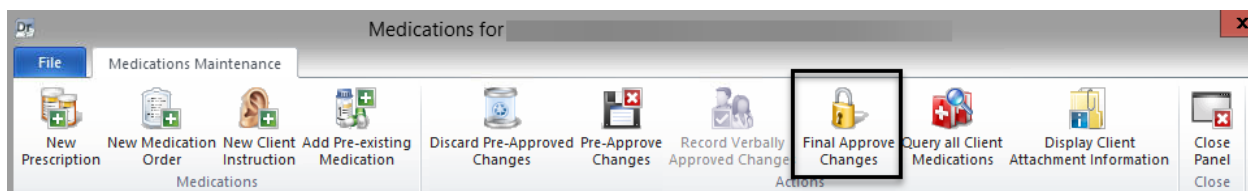
Written Date: 09/21/2015

Issue Method: **Print: Adobe PDF (from LH7U0CNU3489JN3) in session 20**

**Save** Cancel

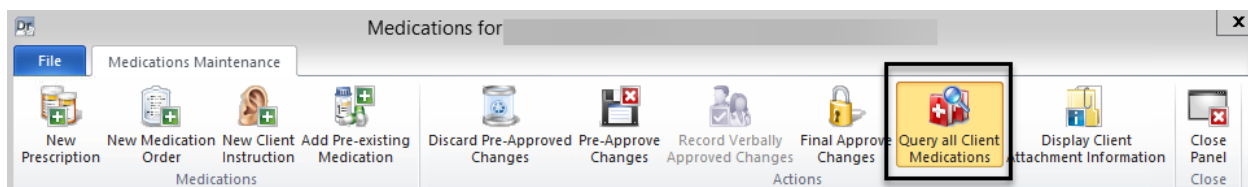
Medication List Medication Details: New Prescription

10. Two medications now display on the medication list. To enter additional medications, complete steps 6-9 on the previous pages. If you are the Prescriber and are done with the batch, select the “Final Approve Changes” button.



*Note: Clinical Support Staff and Non-Prescribers will “Pre-Approve Changes.” See the “Pre-Approve Changes” section under “New Prescriptions.”*

11. Once you select “Final Approve Changes,” the medication query is run automatically. If you need to view the information that is provided in the “Informational,” “Reference Literature,” or “Usual Dose” section, a medication query must be performed manually in the “Medications Maintenance” screen with the “Query all Client Medications” button.





Results for:

File Query Medication Results

Print Leaflet Save and Close Panel Close

Results from the Query ran by RN1 DHP on 01/11/2023 at 12:23 PM.

Query Results

Alerts

Informational

Reference Literature

Usual Dose

Leaflets

Currently Viewing Information for Alerts

Medication	Trigger	Severity	Plausibility	Type
Glucophage	Food	1 - Major Alert		Medication to Food Interaction
Wellbutrin	Food	2 - Moderate Alert		Medication to Food Interaction
Glucophage		4 - General Warni...		General Warning / Contraindication
Wellbutrin		4 - General Warni...		General Warning / Contraindication

General

GENERALLY AVOID: Alcohol can potentiate the effect of metformin on lactate metabolism and increase the risk of lactic acidosis. In addition, alcohol may cause hypoglycemia or hyperglycemia in patients with diabetes. Although hypoglycemia rarely occurs during treatment with metformin alone, the risk may increase with acute consumption of alcohol. Even modest amounts can lower blood sugar significantly, especially when the alcohol is ingested on an empty stomach or following exercise. The mechanism involves inhibition of both gluconeogenesis as well as the counter-regulatory response to hypoglycemia. Episodes of hypoglycemia may last for 8 to 12 hours after ethanol ingestion. By contrast, chronic alcohol abuse can cause impaired glucose tolerance and hyperglycemia. Moderate alcohol consumption generally does not affect blood glucose levels in

Details

Alert Acknowledgement Comments

12. If there is a "Major Alert," type in the "Alert Acknowledgement Comments" field. Select "Save and Close."

13. On the "Medication Changes" screen, selecting "Sign" will constitute as final approval and will transmit or print the medications.

Medication Changes for

File

Client

San Diego, CA 92108 Home: Work:

Gender: Male DOB: 01/01/1990 Age: 33 year(s) Height: Weight:

Allergies: No Medical Condition Review entered

Prescriber

RN1 DHP

Phone: Fax: NPI: 0

Alerts

1 Major 0 Minor

1 Moderate 2 General

Hand Written Do Not Send

Glucophage 500 mg tablet

Take 1 tablet(s) by mouth New Prescription

#30 Tablet(s), Refills: 0, DAW: No, Date Written: 01/11/2023

Wellbutrin 75 mg tablet

Take 1 tablet(s) by mouth New Prescription

#30 Tablet(s), Refills: 0, DAW: No, Date Written: 01/11/2023

Sign

14. The new prescriptions then display in the "Medications" pane of the Client Panel.

TEST FAKE

Medications

Wt...	Med/Str/DF	T	Sig	Additional In...	External	Voided	Discontinued	DAW	Sample	Ref...	Renewal	Dispen...	Issue Method	Staff Name	Note to Ph...	Med Conse...	Earlies...
12/...	Zolof 25	P. Take	...							0		30 / Tab...		ONE, MD			
12/...	Ambien 1	P. Take	...							0		30 / Tab...		ONE, MD			
12/...	Wellbutri	P. Take	...							0		60 / Tab...		ONE, MD			
12/...	haloperid	P. Take	...							0		90 / Tab...		ONE, MD			

Face Sheet Pre-Intake Medications Medical Conditions Assessments Primary Assignment Primary Diagnosis Primary Substance Ab... Current Client Plan Progress Notes Primary Insurance Co...



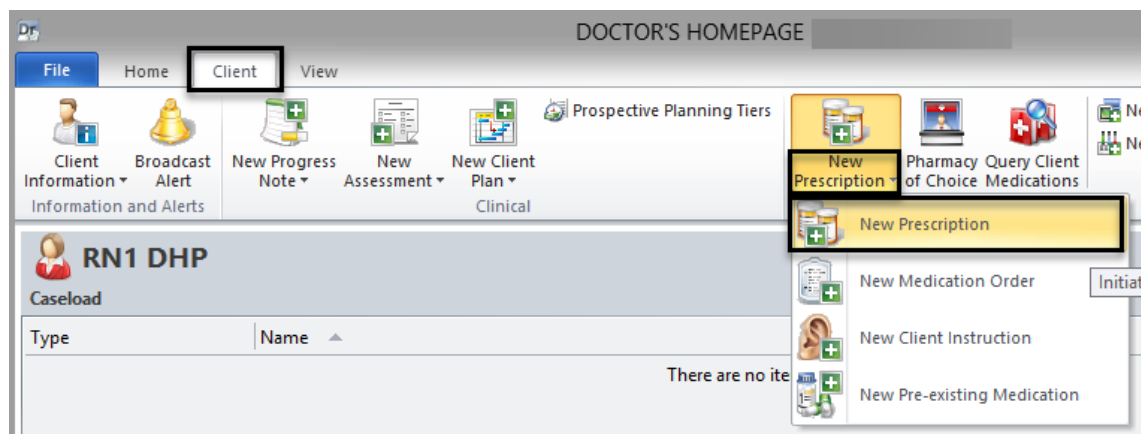
Note: Prescribers will have to final approve (or discard) pre-approved medication batches that have been staged by their Clinical Support Staff. Also, Prescribers will have to co-sign and final approve for any Non-Prescribers for whom they supervise. See "Prescribers: Final Approving a Pre-Approved Medication."



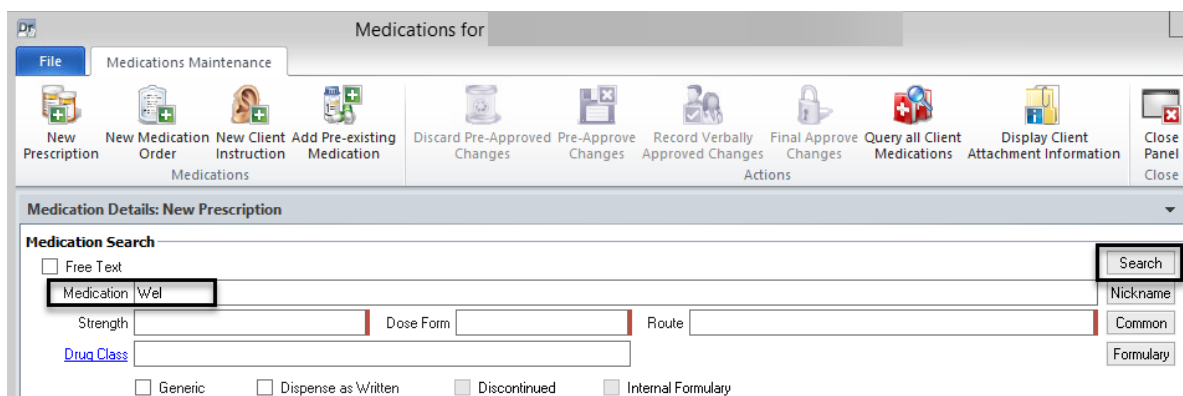
## ENTERING A PRESCRIPTION FOR A SAMPLE MEDICATION

Samples are given on-site and are not sent to a pharmacy for dispensing.

1. Select the appropriate client, and from the "Client" tab, click on the bottom part of the "New Prescription" button.
2. Click on "New Prescription."



3. In the "Medication" field, type in the first few letters (at least three) of the new prescription, and click "Search."





*Note: If you have entered several medications previously, they are easily accessible via the “Common” button. This button displays a list of the Prescriber’s 20 most commonly prescribed medications. Instead of searching, you may select the medication from your “Common” list, then complete step 5.*

**Medication Details: New Prescription**

**Medication Search**

☐ Free Text

Medication

Strength  Dose Form  Route

Drug Class

☐ Generic ☐ Dispense as Written ☐ Sample ☐ Discontinued ☐ Internal Formulary

Search Nickname **Common** Formulary

4. Locate the appropriate medication from the list, and double click on it, or select it and choose “Select” at the top.

**Medication Search**

☐ Begins with ☐ Includes Medication

Search Nickname Clear

**Medication Query Filters**

Strength  Dose Form  Route

☐ Include Herbs only ☐ Include Vitamins only ☐ Include IV Medications only ☐ Include Obsolete Medications

Include Only: ☒ All ☐ Generic Names ☐ Brand Names ☐ Generic Products ☐ Brand Products

**Medication List**

Medication	Type	Transmit	O...
Wellbutrin	Brand Name		
Wellbutrin 100 mg oral tablet	Brand Product	<input checked="" type="checkbox"/>	
Wellbutrin 75 mg oral tablet	Brand Product	<input checked="" type="checkbox"/>	
Wellbutrin SR	Brand Name		



- Enter the appropriate information in the “Sig Builder” and the “Sig Information” fields, select “Samples Given” as the issue method, and select “Save.”

Medications Maintenance

Medication Details: New Prescription

Medication Search

Free Text

Medication: Wellbutrin

Strength: 100 mg

Dose Form: tablet

Route: oral

Drug Class

Generic

Dispense as Written

Discontinued

Internal Formulary

Sig Builder

Free Text

Action: Take

Dose Qty: 1

Unit: tablet(s)

Route: by mouth

Frequency: 2 times a day

Modifiers

Sig Information

Sig: Take 1 tablet(s) by mouth 2 times a day

Days Supply: 30

Qty To Dispense: 60

Unit: TAB

Tablet(s): 60

Start Date: 01/12/2023

End Date: 02/10/2023

Earliest Fill Date: / /

Refills: 0

Estimated Dates: 0

Note to Pharmacy

External

Prescribing Physician

Internal Notes

Written Date: 01/12/2023

Issue Method: Do Not Send: Samples Given

Print

Print (No Default Printer)

Do Not Send

Hand Written

Called In

Samples Given

Save

Cancel

Logged on as RNT DHP

Training

DHP20120224 Template Loaded

No Changes

Note: The “Internal Notes” are only seen by clinical staff. The “Internal Notes” will not show in a printed prescription.

Note: When “Samples Given” is selected as the issue method nothing is transmitted to the pharmacy.

- If you are a Prescriber, select the “Final Approve Changes” button.

Medications Maintenance

Medication List

Ev...	Pr...	Wr...	Type	Med/...	Medic...	Stren...	Dose ...	Route	Sig	Note t...	Start	Da...	End	D...	D...	R...	Di...	Staff ...	Status	Super...	Prescr...	Earl...	F/A
2238	2928	01/...	Pres...	Gluc...	Gluc...	500 mg	tablet	oral	Take 1...		01/...	0				0	30 ...	RN1 D...					✓
2238	2929	01/...	Pres...	Wellb...	Wellb...	75 mg	tablet	oral	Take 1...		01/...	0				0	30 ...	RN1 D...					✓
2243	2936	01/...	Pres...	Lexapr...	Lexapro	10 mg	tablet	oral	Take 1...		01/...	0				0	30 ...	RN1 D...					✓
0	0	01/...	Pres...	Wellb...	Wellb...	100 mg	tablet	oral	Take 1...		01/...	30	02/...			0	60...	New Pre...					

Note: Clinical Support Staff and Non-Prescribers will “Pre-Approve Changes.” See “Pre-Approve Changes to a New Prescription (Clinical Support Staff).”



7. The medication query automatically launches.
8. If there is a "Major Alert," type in the "Alert Acknowledgement Comments" field. Select "Save and Close."

9. On the "Medication Changes" screen, selecting "Sign" will constitute as final approval.

10. The new sample prescription then displays in the "Medications" pane of the Client Panel.



*Note: Prescribers will have to final approve (or discard) pre-approved sample medications that have been staged by their nursing staff. Also, Prescribers will have to co-sign and final approve for any Non-Prescribers they supervise. See "Prescribers: Final Approving a Pre-Approved Medication."*

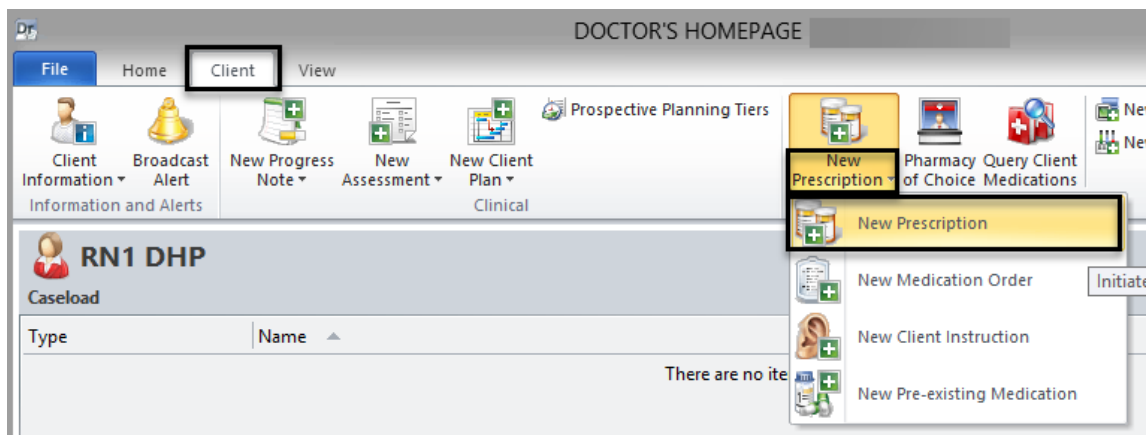


## ENTERING A NEW MEDICATION WITH FREE TEXT



*Note: This is only used for medications that are brand new on the market and have not yet been added to the Multum database. The database is updated monthly, so prescribing this way will be rare.*

1. Select the appropriate client, and from the “Client” tab, click on the bottom part of the “New Prescription” button.
2. Click on “New Prescription.”



3. Check the “Free Text” boxes next to “Medication Search” and “Sig Information.”



*Note: You must check the “Free Text” boxes prior to typing information into the “Medication Search” and “Sig Information” sections. Otherwise, the information is cleared out when the “Free Text” boxes are checked.*

**Medication Details: New Prescription**

**Medication Search**

☒ Free Text

Medication

Strength  Dose Form

Drug Class

☐ Generic ☐ Dispense as Written ☐ Sample ☐ Disco

**Sig Builder**

☒ Free Text

Action	Dose Qty	Unit	Route
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Modifiers



4. Enter the appropriate information in the “Medication Search” and “Sig Information” fields; select the issue method, and select “Save.”

**Medication Details: New Prescription**

**Medication Search**

☒ Free Text

Medication:  Search

Strength:  Dose Form:  Route:  Nickname:

Drug Class:  Common:

☐ Generic ☐ Dispense as Written ☐ Discontinued ☐ Internal Formulary Formulary:

**Sig Builder**

☒ Free Text

Action	Dose Qty	Unit	Route	Frequency
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Modifiers:

**Sig Information**

Sig:

Days Supply:  Qty To Dispense:  Unit:  Tablet(s):

Start Date:  End Date:  Earliest Fill Date:  Refills:  ☐ Estimated Dates

Note to Pharmacy:

☐ External Prescribing Physician:

Internal Notes:

Written Date:

**Issue Method**

Medication List Medication Details: New Prescription



Note: The “Note to Pharmacy” is seen by the pharmacy, but the “Internal Notes” are only seen by clinical staff. The “Internal Notes” will not show in a printed or transmitted prescription.

5. If you are the Prescriber, click the “Final Approve Changes” button.



Note: Clinical Support Staff and Non-Prescribers will “Pre-Approve Changes.” See “Pre-Approve Changes to a New Medication (Clinical Support Staff).”

**Medications for**

**File** Medications Maintenance

New Prescription New Medication Order New Client Instruction Add Pre-existing Medication Discard Pre-Approved Changes Pre-Approve Changes Record Verbally Approved Changes **Final Approve Changes** Query all Client Medications Display Client Attachment Information Close Panel Close

**Medication List**

Ev...	Pr...	Wr...	Type	Med/...	Medic...	Stren...	Dose ...	Route	Sig	Note t...	Start	Da...	End	D...	D...	R...	Di...	Staff ...	Status	Super...	Prescr...	Earl...	F/A
2238	2928	01/...	Pres...	Gluco...	Gluco...	500 mg	tablet	oral	Take 1...		01/...	0				0	30 ...	RN1 D...					
2238	2929	01/...	Pres...	Wellb...	Wellb...	75 mg	tablet	oral	Take 1...		01/...	0				0	30 ...	RN1 D...					
2243	2936	01/...	Pres...	Lexapr...	Lexapro	10 mg	tablet	oral	Take 1...		01/...	0				0	30 ...	RN1 D...					
0	0	01/...	Pres...	New ...	New ...	20 mg	Tablet	Oral	Take o...		01/...	30	02/...			0	12...						

New Pre...



6. The medication query automatically launches. If there is a “Major Alert,” type in the “Alert Acknowledgement Comments” field. Select “Save and Close.”

Results for: Query Medication Results

File | Query Medication Results

Print Leaflet | Save and Close | Close Panel

Results from the Query ran by RN1 DHP on 01/12/2023 at 10:44 AM.

Query Results	Currently Viewing Information for Alerts				
	Medication	Trigger	Severity	Plausibility	Type
Alerts	Glucophage	Food	1 - Major Alert		Medication to Food I...
Informational	Wellbutrin		1 - Major Alert		Duplicate Therapies
Reference Literature	Wellbutrin	Lexapro	1 - Major Alert		Medication Interacti...
Usual Dose	Wellbutrin	Food	2 - Moderate ...		Medication to Food I...
Leaflets					

**General**

GENERALLY AVOID: Alcohol can potentiate the effect of metformin on lactate metabolism and increase the risk of lactic acidosis. In addition, alcohol may cause hypoglycemia or hyperglycemia in patients with diabetes. Although hypoglycemia rarely occurs during treatment with metformin alone, the risk may increase with acute consumption of alcohol. Even modest amounts can lower blood sugar significantly, especially when the alcohol is ingested on an empty stomach or following exercise. The mechanism involves inhibition of both gluconeogenesis as well as the counter-regulatory response to hypoglycemia. Episodes of hypoglycemia may last for 8 to 12 hours after ethanol ingestion. By contrast, chronic alcohol

**Details**

**Alert Acknowledgement Comments**



*Note: New Medications with free text do not query.*

7. On the “Medication Changes” screen, selecting “Sign” will constitute as final approval.

Medication Changes for

File

Client

Prescriber  
RN1 DHP

Phone: Fax:

NPI: 0

Alerts: 3 Major 0 Minor 2 Moderate 3 General

**Hand Written** **Do Not Send**


**New Med 20 mg Tablet**

Take one tablet by mouth 4 times a day

#120 Tablet(s), Refills: 0, DAW: No, Date Written: 01/12/2023

New Prescription

Sign

- 

# TEST FAKE

## Medications

Wt...	Med/Str/DF	T	Sig	Additional ...	External	Voided	Discontinued	DAW	Sample	Re...	Renewal	Dispe...	Issue Meth...	Staff Name	Note to P...	Med Cons...	Earlie...
12...	Zoloft 25 m...	P	Tak...							0		30 / Ta...		ONE, MD			
12...	Ambien 10 ...	P	Tak...							0		30 / Ta...		ONE, MD			
12...	Wellbutrin 1...	P	Tak...							0		60 / Ta...		ONE, MD			
12...	haloperidol ...	P	Tak...							0		90 / Ta...		ONE, MD			
12...	Wellbutrin 1...	P	Tak...						<input checked="" type="checkbox"/>	0		60 / Ta...		ONE, MD			
12...	New Med 2...	P	Tak...							0		120 / T...		ONE, MD			

Face Sheet
Pre-Intake
**Medications**
Medical Conditions
Assessments
Primary Assignm...
Primary Diagnosis
Primary Substan...
Current Client Plan
Progress Notes
Primary Insuran...



## NOTES

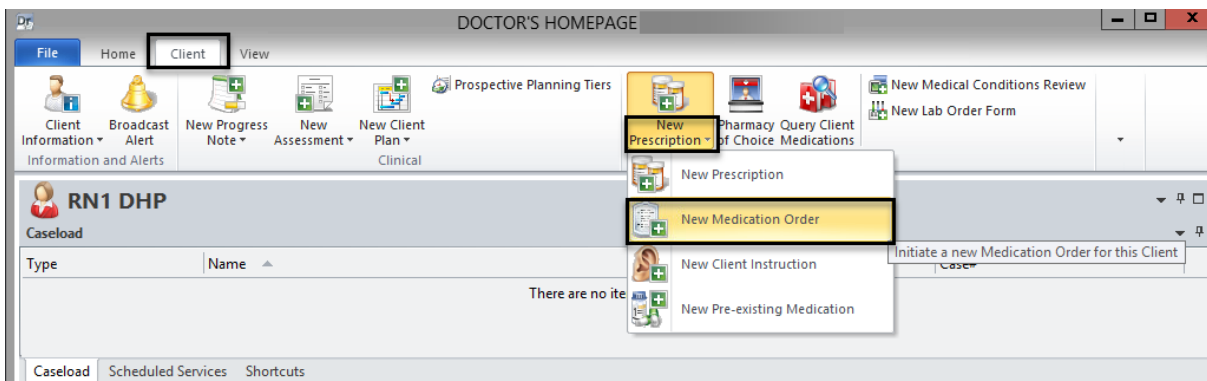
This image shows a blank sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.



## ENTERING A NEW MEDICATION ORDER

Medications Orders are for dispensing onsite medications and are never sent to the pharmacy. (Example: Long lasting injectables).

1. Select the appropriate client, from the “Client” tab, and click on the bottom part of the “New Prescription” button.
2. Click on “New Medication Order.”



3. The “New Medication Order” window launches. In the “Medication” field, type in the first few letters (at least three) of the new prescriptions, and select search.



*Note: Instead of searching for a medication, you can select the “Common” button which displays a list of the Prescriber’s 20 most commonly prescribed medications. You would select the medication you wished from here and then proceed to number 5.*



4. The Multum database is searched for the medication information. Locate the appropriate medication from the list and double click on it, or click once and click “Select” at the top.

**Medication Search**

☒ Begins with ☐ Includes Medication:

**Medication Query Filters**

Strength:  ☐ Include Herbs only ☒ Include Only: ☒ All

Dose Form:  ☐ Include Vitamins only ☐ Generic Names

Route:  ☐ Include IV Medications only ☐ Brand Names

☐ Include Obsolete Medications ☐ Generic Products

☐ Brand Products

**Medication List**

Medication	Type	Transmit	O...
haloperidol 5 mg/mL injectable solution	Generic Product	<input checked="" type="checkbox"/>	
haloperidol compounding powder	Generic Product	<input checked="" type="checkbox"/>	
haloperidol decanoate 100 mg/mL intramuscular solution	Generic Product	<input checked="" type="checkbox"/>	
haloperidol decanoate 50 mg/mL intramuscular solution	Generic Product	<input checked="" type="checkbox"/>	
Halotestin	Brand Name	<input checked="" type="checkbox"/>	

5. A new window launches. Enter the appropriate information in the “Sig Builder” and the “Sig Information” fields; complete the “Issue Method,” and select “Save.”



*Note: The Sig Builder will pre-populate. If you wish to change any of these fields click on title of the field (ex. “Action”) or free text is also available.”*

**Sig Builder**

☐ Free Text

Action	Dose Qty	Unit	Route	Frequency
Take	1	unit(s)	Intramuscularly	weekly

Modifiers:

**Sig Information**

Sig:

Days Supply:  Qty To Dispense:  Unit:

Start Date:  End Date:  Earliest Fill Date:  Refills:  ☐ Estimated Dates

Add Instructions:

☐ External Prescribing Physician:

Internal Notes:

Written Date:

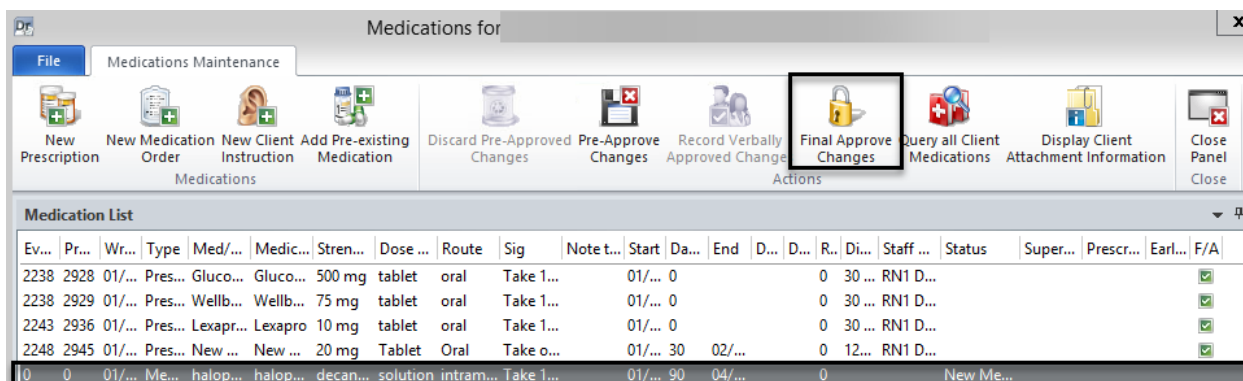
Issue Method:

Medication List Medication Details: New Medication Order



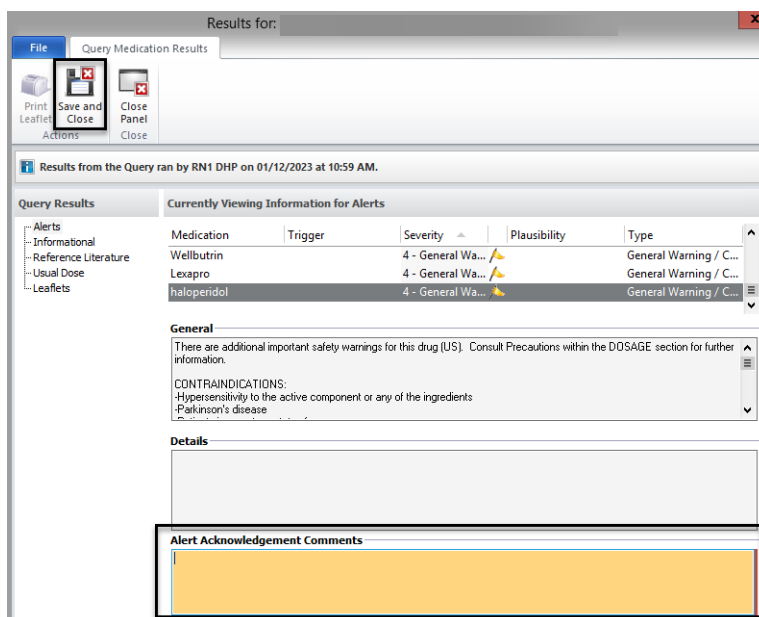
*Note: The “Note to Pharmacy” is seen by the pharmacy, but the “Internal Notes” are only seen by clinical staff. The “Internal Notes” will not show in a printed or transmitted prescription.*

- If you are a Prescriber, click the “Final Approve Changes” button.



*Note: Clinical Support Staff will “Pre-Approve Changes.” See “Pre-Approve Changes to a New Prescription (Clinical Support Staff).”*

- The medication query automatically launches. If there is a “Major Alert,” type in the “Alert Acknowledgement Comments” field. Select “Save and Close.”





8. On the “Medication Changes” screen, selecting “Sign” will constitute as final approval.

Medication Changes for [Client Name]

**Client**

**Prescriber**  
RN1 DHP  
NPI: 0  
Phone: Fax:

**Verbal**  
haloperidol decanoate 100 mg/mL solution  
Take 1 unit(s) Intramuscularly weekly  
#0, Refills: 0, DAW: No, Date Written: 01/12/2023

**Do Not Send**

**New Medication Order**

**Sign**

9. The new medication order then displays in the “Medications” pane of the Client Panel.

W...	Med/Str...	Type	Sig	Addition...	External	Voided	Discontinued	DAW	Sample	R...	Renewal	Disp...	Issue Me...	Staff Name	Note to...	Med Co...	Earli...	F/A
08...	lithium 1...	Pre-existing Medic...	Ta...		<input checked="" type="checkbox"/>				0					ONE, MD				<input checked="" type="checkbox"/>
08...	Wellbutr...	Prescription	Ta...						0		90 / ...	Printed		ONE, MD				<input checked="" type="checkbox"/>
09...	Glucoph...	Pre-existing Medic...	Ta...						0					ONE, MD				<input checked="" type="checkbox"/>
09...	Wellbutr...	Prescription	Ta...						<input checked="" type="checkbox"/>	0	60 / ...	Samples ...		ONE, MD				<input checked="" type="checkbox"/>
09...	New Me...	Prescription	Ta...						0		120 / ...	Hand Wri...		ONE, MD				<input checked="" type="checkbox"/>
09...	haloperi...	Medication Order	Ta...						0			Verbal		ONE, MD				<input checked="" type="checkbox"/>

Face Sheet Pre-Intake **Medications** Medical Conditions Assessments Primary Assignm... Primary Diagnosis Primary Substan... Current Client Plan Progress Notes Primary Insuranc...



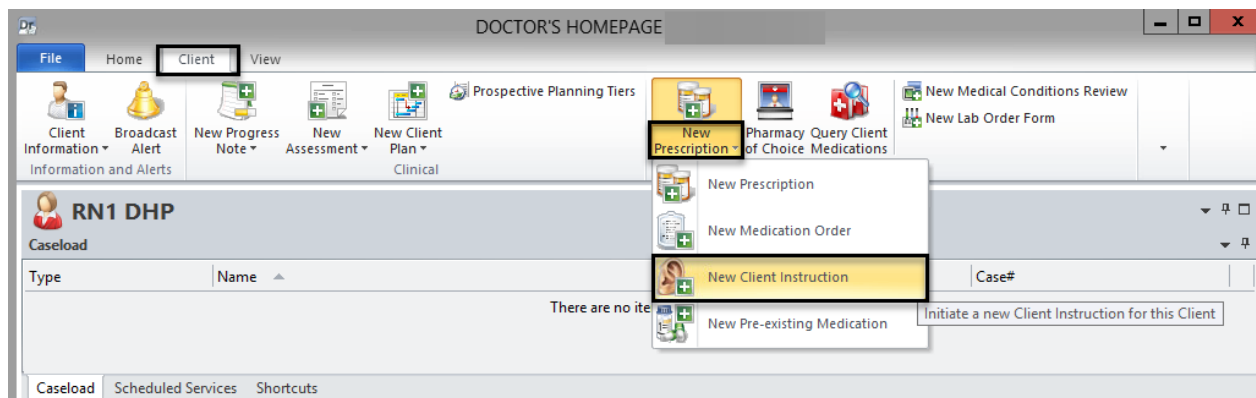
*Note: Prescribers will have to final approve (or discard) pre-approved Medication Orders that have been staged by their Clinical Support Staff. Also, Prescribers will have to co-sign and final approve for any Non-Prescribers they supervise. See “Prescribers: Final Approving a Pre-Approved Medication.”*



## ENTERING A NEW CLIENT INSTRUCTION

Client Instructions are only entered for Over the Counter (OTC) medications. Prescribers can final approve a Client Instruction. It is important to use this feature for 2 reasons:

- Accuracy and complete medication information for the client in CCBH.
  - OTCs entered into CCBH will be checked with the client's pre-existing and new prescriptions for contraindications etc. via the Multum database.
1. Select the appropriate client, and from the "Client Tab," click on the bottom part of the "New Prescriptions" button.
  2. Click on "New Client Instruction."



3. In the "Medication" field, type the first few letters (at least three) of the OTC medication, and click "Search."



4. Locate the appropriate OTC medication on the list and double click on it, or single click and click “Select” at the top.

**Medication Lookup**

File Lookup Panel

Select Close Panel

Click on the search button to perform a search for medications based on the criteria in the top section.

**Medication Search**

☒ Begins with ☐ Includes Medication:  Search Nickname Clear

**Medication Query Filters**

Strength  Dose Form  Route

☐ Include Herbs only ☐ Include Vitamins only ☐ Include IV Medications only ☐ Include Obsolete Medications

Include Only: ☒ All ☐ Generic Names ☐ Brand Names ☐ Generic Products ☐ Brand Products

**Medication List**

Medication	Type	Trans...	O...
Benadryl	Brand Name		
Benadryl 1% topical spray	Brand Product		
Benadryl 12.5 mg oral tablet, chewable	Brand Product		
Benadryl 2% topical cream	Brand Product		
Benadryl 25 mg oral capsule	Brand Product	<input checked="" type="checkbox"/>	
Benadryl 25 mg oral tablet	Brand Product	<input checked="" type="checkbox"/>	

5. Enter the appropriate information in the “Sig Builder” and “Sig Information” fields, select the “Issue Method,” and click “Save.”

**Sig Builder**

☐ Free Text

Action	Dose Qty	Unit	Route	Frequency
Chew	1	tablet(s)		

Modifiers

**Sig Information**

Sig: Chew 1 tablet(s)

Days Supply:  Qty To Dispense:  Unit:

Start Date:  End Date:  Earliest Fill Date:  Refills:  ☐ Estimated Dates

Add Instructions

☐ External Prescribing Physician:

Internal Notes

Written Date:

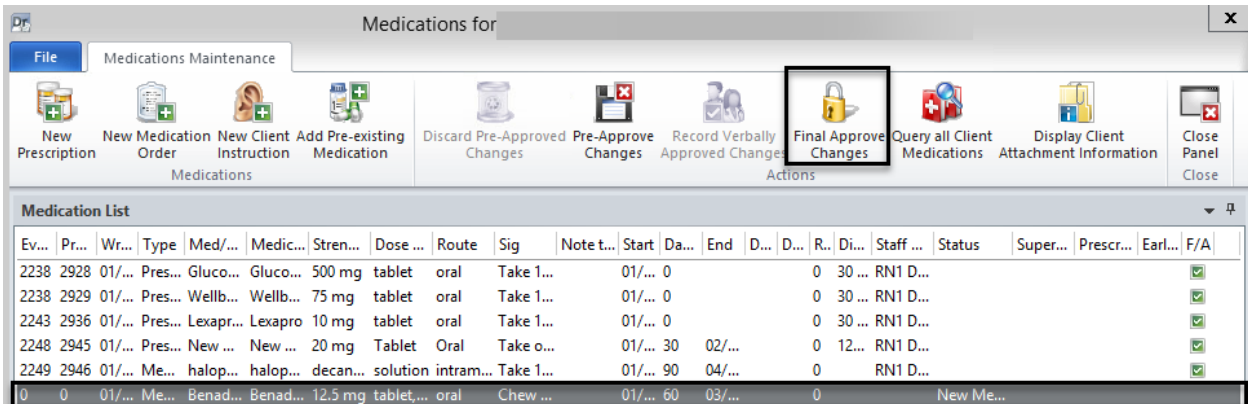
Issue Method: **Select Issue Method**

- Print
- Print (No Default Printer)
- Do Not Send
- Hand Written
- Verbal

Save Cancel

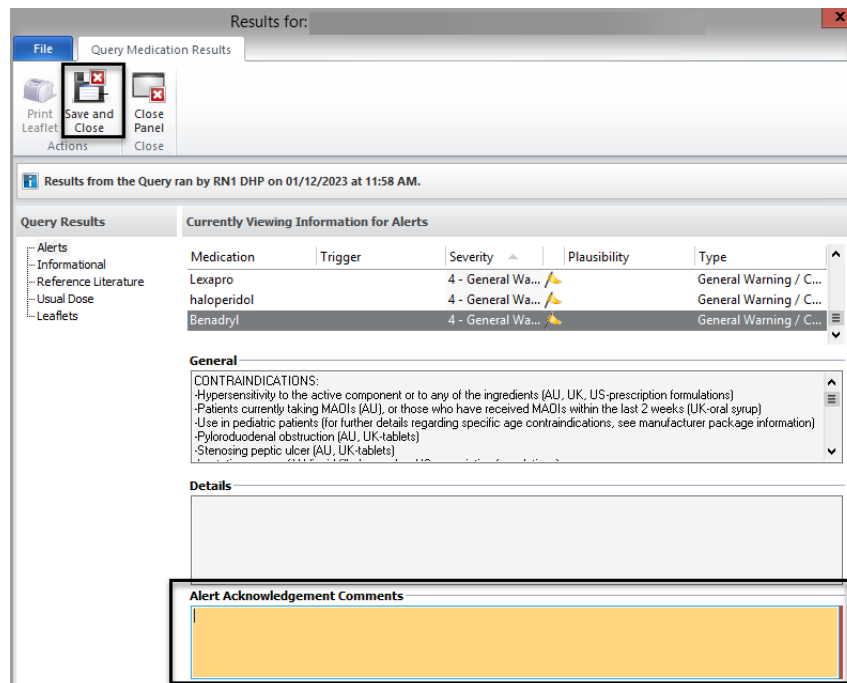


6. If you are a Prescriber, select the “Final Approve Changes” button.



*Note: Clinical Support Staff will “Pre-Approve Changes.” See “Pre-Approve Changes to a New Prescription (Clinical Support Staff).”*

7. The medication query automatically launches. If there is a “Major Alert,” type in the “Alert Acknowledgement Comments” field. Select “Save and Close.”





8. On the “Medication Changes” screen, selecting “Sign” will constitute as final approval.

9. The new OTC medication then displays in the “Medications” pane of the Client Panel.

W...	Med/Str...	Type	Sig	Addition...	External	Voided	Discontinued	DAW	Sample	R...	Renewal	Disp...	Issue Me...	Staff Name	Note to ...	Med Co...	Earli...	F/A
08...	SEROQu...	Pre-existing Medica...	Ta...		<input checked="" type="checkbox"/>				0					ONE, MD				<input checked="" type="checkbox"/>
08...	lithium 1...	Pre-existing Medica...	Ta...		<input checked="" type="checkbox"/>				0					ONE, MD				<input checked="" type="checkbox"/>
08...	Wellbutri...	Prescription	Ta...						0			90 / ...	Printed	ONE, MD				<input checked="" type="checkbox"/>
09...	Glucoph...	Pre-existing Medica...	Ta...						0					ONE, MD				<input checked="" type="checkbox"/>
09...	Wellbutri...	Prescription	Ta...						0	<input checked="" type="checkbox"/>		60 / ...	Samples ...	ONE, MD				<input checked="" type="checkbox"/>
09...	New Me...	Prescription	Ta...						0			120 / ...	Hand Wri...	ONE, MD				<input checked="" type="checkbox"/>
09...	haloperi...	Medication Order	Ta...						0				Verbal	ONE, MD				<input checked="" type="checkbox"/>
09...	Benadryl...	Client Instruction	Ch...						0				Printed	ONE, MD				<input checked="" type="checkbox"/>



*Note: Prescribers will have to final approve (or discard) pre-approved Client Instructions that have been staged by their Clinical Support Staff. Also, Prescribers will have to co-sign and final approve for any Non-Prescribers they supervise. See “Prescribers: Final Approving a Pre-Approved Medication.”*



## RENEWING A PRESCRIPTION



*Note: Renewing a prescription is the same as refilling a prescription.*

1. Select the appropriate client, and double click on any medication in the “Medications” pane.

Wri...	Med/Str/DF	T	Sig	Additional Ins...	External	Voided	Discontinued	DAW	Sample	Refills	Renewal	Dispens...	Issue Method	Staff Name	Note to Phar...	Med Consent	Earliest...
12/...	Wellbutrin ...	P	Take ...							0		60 / Tabl...	ONE, MD				
12/...	haloperidol ...	P	Take ...							0		90 / Tabl...	ONE, MD				
12/...	Wellbutrin ...	P	Take ...							0		60 / Tabl...	ONE, MD				
12/...	New Med ...	P	Take ...							0		120 / Tab...	ONE, MD				
12/...	haloperidol ...	M	Take ...							0			ONE, MD				
12/...	Benadryl 1...	C	Chew ...							0			ONE, MD				

2. The client's medications appear in a new window. Right click on the medication you wish to renew. A drop down menu appears. Select “Renew.”

Ev...	Pr...	Wri...	Type	Med/St...	Medica...	Strength	Dose F...	Route	Sig	Note t...	Start	Da...	End	D...	D...	R...	Di...	Staff N...	Status	Superv...	Prescri...	Earl...	F/A
12...	23...	08/...	Pre...	SEROquel	SEROquel	25 mg	tablet	oral	Take 1 ...		01/...	0				0		ONE, MD			Dr. Att...		✓
12...	23...	08/...	Pre...	lithium ...	lithium	150 mg	capsule	oral	Take 1 ...		01/...	0				0		ONE, MD			Dr. Att...		✓
12...	23...	08/...	Pres...	Wellbut...	Wellbutrin	75 mg	tablet	oral	Take 1 ...		08/...	0			0	90 ...	ONE, MD					✓	
12...	23...	09/...	Pre...	Glucop...	Glucop...	500 mg	tablet	oral	Take 1 ...		08/...	0			0		ONE, MD					✓	
12...	23...	09/...	Pres...	Wellbut...	Wellbutrin	100 mg	tablet	oral	Take 1 ...		09/...	30	10/...		0	60 ...	ONE, MD					✓	
12...	23...	09/...	Pres...	New M...	New Med	20 mg	Tablet	Oral	Take o...		09/...	30	10/...		0	12...	ONE, MD					✓	
12...	23...	09/...	Medi...					Intramu...	Take 1 ...		09/...	90	12/...		0		ONE, MD					✓	
12...	23...	09/...	Clie...	B				oral	Chew 1 ...		09/...	60	11/...		0		ONE, MD					✓	

3. A new window is launched. If desired, change the “Sig Builder” and “Sig Information.” The “Start Date” defaults to the date after the previous prescription would have ended. Select a new “Issue Method” and select “Save.”

**Sig Builder**

Free Text:  Action:  Dose Qty:  Unit:  Route:  Frequency:

Modifiers:

**Sig Information**

Sig:

Days Supply:  Qty To Dispense:  Unit:

Start Date:  End Date:  Earliest Fill Date:  Refills:  ☐ Estimated Dates

Add Instructions:

Internal Notes:

Written Date:

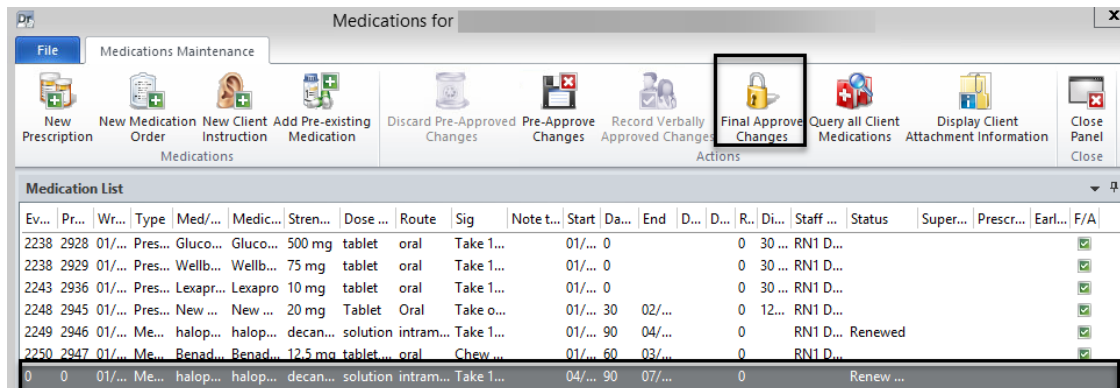
Issue Method:  **Select Issue Method**

**Save** **Cancel**



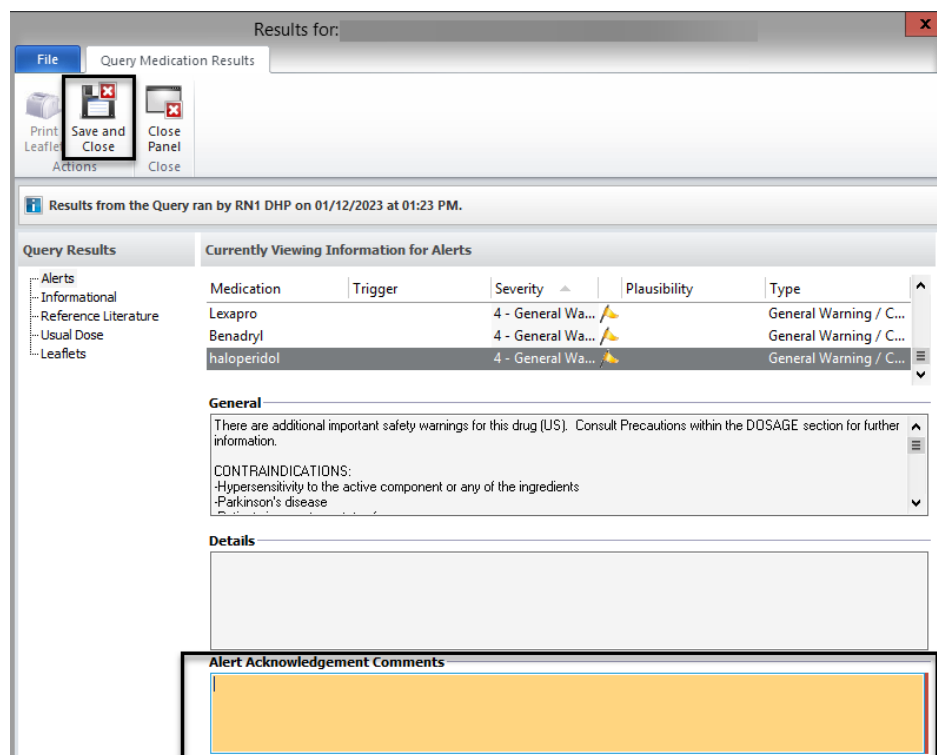
Note: The “Note to Pharmacy” is seen by the pharmacy, but the “Internal Notes” are only seen by clinical staff. The “Internal Notes” will not show in a printed or transmitted prescription.

- If you are a Prescriber, click the “Final Approve Changes” button.



Note: Clinical Support Staff and Non-Prescribers will “Pre-Approve Changes.” See “Pre-Approve Changes to a New Prescription (Clinical Support Staff).”

- The medication query automatically launches. If there is a “Major Alert,” type in the “Alert Acknowledgement Comments” field. Select “Save and Close.”





6. On the “Medication Changes” screen, selecting “Sign” will constitute as final approval.

Medication Changes for LIM DHP 6368 Male Born: 01/01/1990 (TRAIN)

File

Client

Prescriber  
RN1 DHP NPI: 0 Alerts

Phone: Fax:

5 Major 0 Minor  
6 Moderate 5 General

Hand Written Do Not Send

haloperidol decanoate 100 mg/mL solution  
Take 1 unit(s) Intramuscularly weekly  
#0, Refills: 0, DAW: No, Date Written: 01/12/2023

Renew Medication Order

Sign

7. The renewed prescription then displays in the “Medications” pane of the Client Panel.

FAKE TEST

Medications

W...	Med/Str...	Type	Sig	Addition...	External	Voided	Discontinued	DAW	Sample	R...	Renewal	Disp...	Issue Me...	Staff Name	Note to...	Med Co...	Earli...	F/A
08...	SEROqu...	Pre-existing Medic...	Ta...							0				ONE, MD				
08...	lithium 1...	Pre-existing Medic...	Ta...							0				ONE, MD				
08...	Wellbutr...	Prescription	Ta...							0		90 / ...	Printed	ONE, MD				
09...	Glucoph...	Pre-existing Medic...	Ta...							0				ONE, MD				
09...	Wellbutr...	Prescription	Ta...							0		60 / ...	Samples ...	ONE, MD				
09...	New Me...	Prescription	Ta...							0		120 / ...	Hand Wri...	ONE, MD				
09...	haloperi...	Medication Order	Ta...							0			Verbal	ONE, MD				
09...	Benadry...	Client Instruction	Ch...							0			Printed	ONE, MD				
09...	haloperi...	Medication Order	Ta...							0			Verbal	ONE, MD				

Face Sheet Pre-Intake Medications Medical Conditions Assessments Primary Assignm... Primary Diagnosis Primary Substan... Current Client Plan Progress Notes Primary Insuranc...



*Note: Prescribers will have to final approve (or discard) pre-approved renewal medications that have been staged by their Clinical Support Staff. Also, Prescribers will have to co-sign and final approve for any Non-Prescribers they supervise. See “Prescribers: Final Approving a Pre-Approved Medication.”*



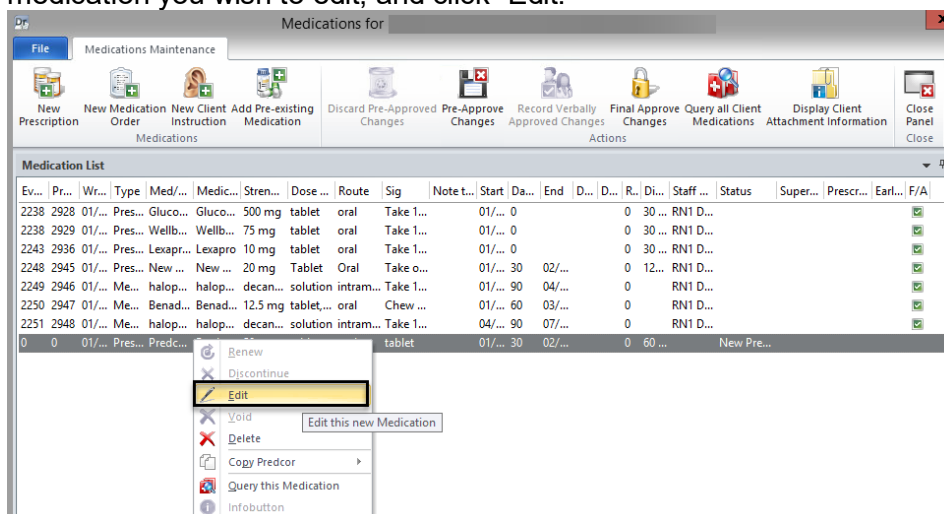
## EDITING A MEDICATION

A medication can only be edited BEFORE it has been final approved. You would do this, for example, if you are in the middle of a prescription and realize you've made a minor error. If a medication needs editing after final approval, the medication would need to be voided or discontinued and re-entered as a new prescription.

Also, Prescribers can edit medications that have been staged for them and have been “pre-approved.”

Prescribers, Non-Prescribers, and Clinical Support Staff all have access to edit a medication before final approval.

1. In the “Medication Maintenance” window, right click on the non-final approved medication you wish to edit, and click “Edit.”



2. A new window launches. Make the appropriate change in the “Sig Builder” portion of the window. In this example we will change the frequency from 3 times a day to 2 times a day. Then, select the “Save.”

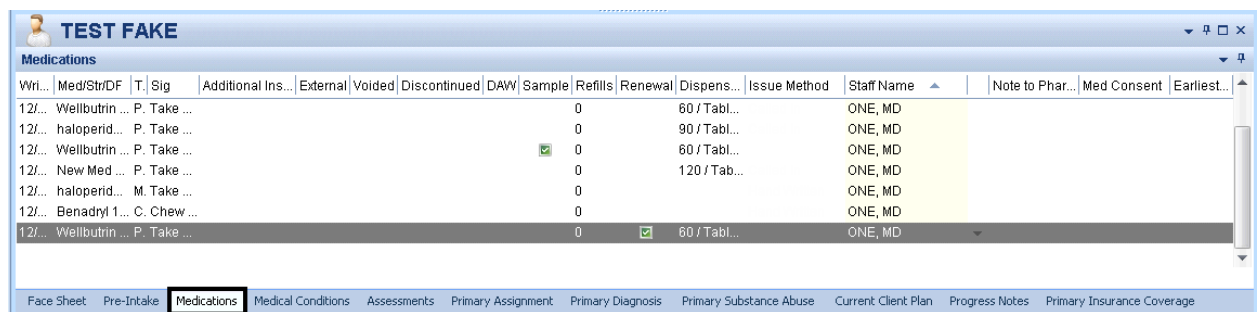
3. Complete the final approval process.



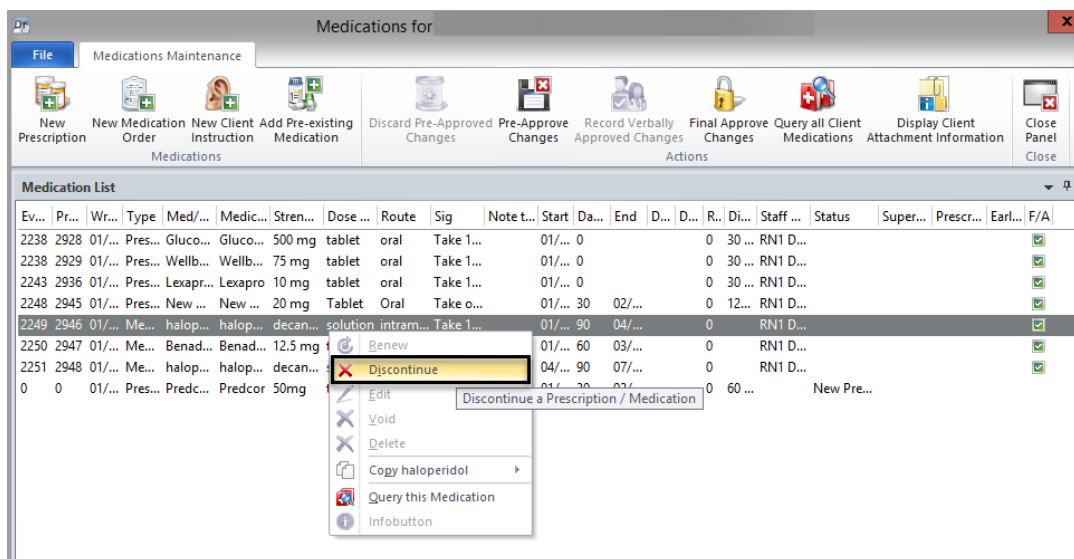
## DISCONTINUING A MEDICATION

Prescriptions are automatically discontinued in DHP if there is an end date in the Sig Builder and the end date has passed. However, there may be time when you want to discontinue a medication in the client's record (for example, you find out that the pre-existing medication that was prescribed by another Prescriber has been terminated, or you learn the client has stopped taking a medication). Discontinuing a medication does NOT alert the pharmacy- you must contact the pharmacy directly to let them know.

1. Select the appropriate client, and double click on the medication you wish to discontinue in the "Medications" pane.



2. The "Medications List" for that client will launch. Right click on the medication you wish you discontinue. A drop down menu will launch. Click on "discontinue."





- The “Medication Details: Discontinue Prescription” window launches. The end date will default to the current date (but may be changed). Enter the “Issue Method” and click “Save.”

Medication Details: Discontinue Medication Order

**Medication Search**

Free Text

Medication: haloperidol

Strength: decanoate 100 mg/mL

Dose Form: solution

Route: intramuscular

Drug Class:

☒ Generic ☐ Dispense as Written ☒ Discontinued ☐ Internal Formulary

**Sig Builder**

Free Text

Action: Take Dose Qty: 1 Unit: unit(s) Route: Intramuscularly Frequency: weekly

Modifiers:

**Sig Information**

Sig: Take 1 unit(s) Intramuscularly weekly

Days Supply: 90 Qty To Dispense: Unit: Estimated Dates

Start Date: 01/12/2023 End Date: 01/12/2023 Earliest Fill Date: / / Refills: Estimated Dates

Add Instructions:

External Prescribing Physician

Internal Notes:

Written Date: 01/12/2023 Originally communicated verbally to Client

Issue Method: Do Not Send: Haloperidol discontinued

Print

Print (No Default Printer)

Do Not Send

Hand Written

Verbal

Save Cancel

Medication List Medication Details

Logged on as RN1 DHP

DHP20120224 Template Loaded

No Changes

- You are returned to the “Medications Maintenance” window. A green check now appears in the “Discontinued” column for this medication. If are you a prescriber, click the “Final Approve Changes” button.

Medications Maintenance

**Actions**

New Prescription New Medication Order New Client Instruction Add Pre-existing Medication Discard Pre-Approved Changes Pre-Approve Changes Record Verbally Approved Changes Final Approve Changes Query all Client Medications Display Client Attachment Information Close Panel Close

**Medication List**

Ev...	Pr...	Wr...	Type	Med/...	Medic...	Stren...	Dose ...	Route	Sig	Note t...	Start	Da...	End	Dis...	D...	R...	Di...	Staff ...	Status	Super...	Prescr...	Earl...	F/A
2238	2928	01/...	Pres...	Gluco...	Gluco...	500 mg	tablet	oral	Take 1...		01/...	0				0	30 ...	RN1 D...					✓
2238	2929	01/...	Pres...	Wellb...	Wellb...	75 mg	tablet	oral	Take 1...		01/...	0				0	30 ...	RN1 D...					✓
2243	2936	01/...	Pres...	Lexapr...	Lexapro	10 mg	tablet	oral	Take 1...		01/...	0				0	30 ...	RN1 D...					✓
2248	2945	01/...	Pres...	New ...	New ...	20 mg	Tablet	Oral	Take o...		01/...	30	02/...			0	12...	RN1 D...					✓
2249	2946	01/...	Me...	halop...	halop...	decan...	solution	intram...	Take 1...		01/...	90	01/...	✓		0		RN1 D...	Disconti...				✓
2250	2947	01/...	Me...	Benad...	Benad...	12.5 mg	tablet...	oral	Chew ...		01/...	60	03/...			0		RN1 D...					✓
2251	2948	01/...	Me...	halop...	halop...	decan...	solution	intram...	Take 1...		04/...	90	07/...			0		RN1 D...					✓



Note: Clinical Support Staff and Non-Prescribers will “Pre-Approve Changes.” See “Pre-Approve Changes.”



Results for:

File Query Medication Results

Print Leaflet Save and Close Close Panel Close

Results from the Query ran by RN1 DHP on 01/12/2023 at 02:07 PM.

Query Results

Alerts Informational Reference Literature Usual Dose Leaflets

Currently Viewing Information for Alerts

Medication	Trigger	Severity	Plausibility	Type
Glucophage	Food	1 - Major Alert	▲	Medication to Food I...
Wellbutrin		1 - Major Alert	▲	Duplicate Therapies
Wellbutrin	haloperidol	1 - Major Alert	▲	Medication Interacti...
Wellbutrin	Lexapro	1 - Major Alert	▲	Medication Interacti...

General

GENERALLY AVOID: Alcohol can potentiate the effect of metformin on lactate metabolism and increase the risk of lactic acidosis. In addition, alcohol may cause hypoglycemia or hyperglycemia in patients with diabetes. Although hypoglycemia rarely occurs during treatment with metformin alone, the risk may increase with acute consumption of alcohol. Even modest amounts can lower blood sugar significantly, especially when the alcohol is ingested on an empty stomach or following exercise. The mechanism involves inhibition of both gluconeogenesis as well as the counter-regulatory response to hypoglycemia. Episodes of hypoglycemia may last for 8 to 12 hours after ethanol ingestion. By contrast, chronic alcohol

Details

Alert Acknowledgement Comments

5. The medication query automatically launches. If there is a “Major Alert,” type in the “Alert Acknowledgement Comments” field. Select “Save and Close.”

6. On the “Medication Changes” screen, selecting “Sign” will constitute as final approval.

Medication Changes for

File

Client

Prescriber RN1 DHP NPI: 0

Phone: Fax:

Alerts 5 Major 0 Minor 6 Moderate 5 General

Verbal Do Not Send

haloperidol decanoate 100 mg/mL solution

Take 1 unit(s) Intramuscularly weekly

#0, Refills: 0, DAW: No, Date Written: 01/12/2023

Discontinue Medication Order

Sign

7. The discontinued prescription then displays in the “Medications” pane of the Client Panel with a green check-mark in the “Discontinued” column.

FAKE TEST

Medications

W...	Med/St...	Type	Sig	Addition...	External	Voided	Discontinued	DAW	Sample	R...	Renewal	Disp...	Issue Me...	Staff Name	Note to ...	Med Con...	Earl...	F/A
0...	haloper...	Medicati...	Ta...				✓		0				Verbal	ONE, MD				✓
0...	SEROq...	Pre-exis...	Ta...		✓				0					ONE, MD				✓
0...	lithium ...	Pre-exis...	Ta...		✓				0					ONE, MD				✓
0...	Wellbut...	Prescrip...	Ta...						90 / ...	Printed				ONE, MD				✓

Face Sheet Pre-Intake Medications Medical Condi... Assessments Primary Assign... Primary Diagn... Primary Substa... Current Client... Progress Notes Primary Insura...



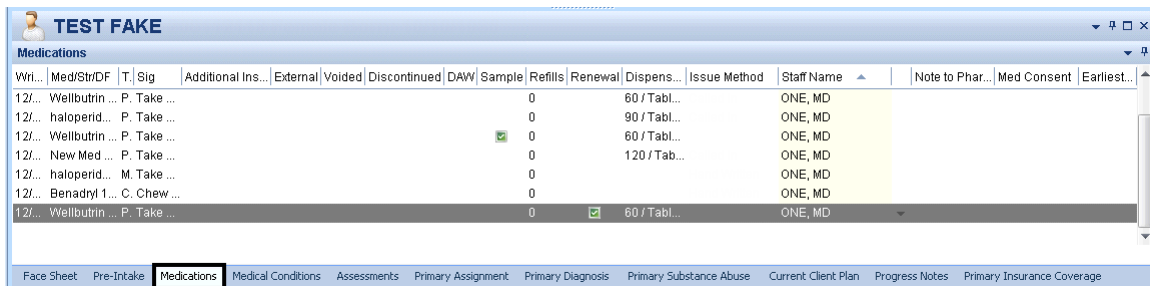
Note: Prescribers will have to final approve (or discard) pre-approved discontinued medication that has been staged by their Clinical Support Staff. Also, Prescribers will have to co-sign and final approve for any Non-Prescribers they supervise. See “Prescribers: Final Approving a Pre-Approved Medication.”



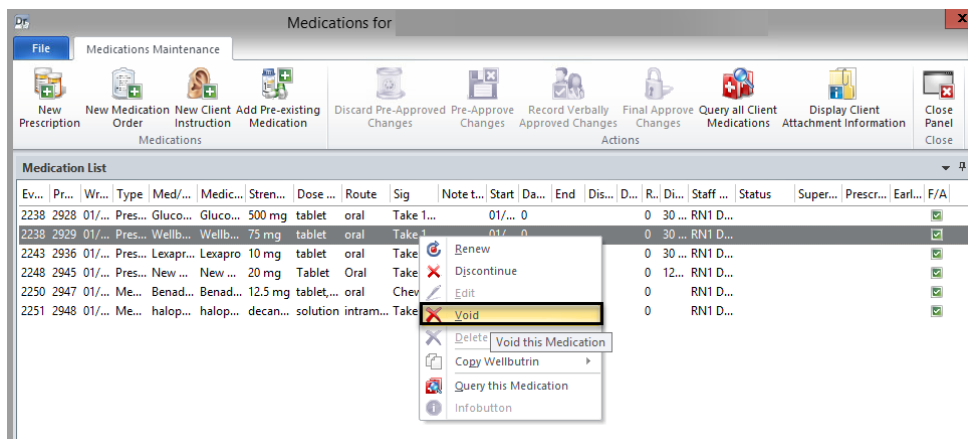
## VOIDING A MEDICATION

The use of “Void” is only completed on medications that have been Final Approved in error (such as accidentally prescribing a medication for the wrong client). Voiding a medication does NOT alert the pharmacy- you must contact the pharmacy directly to let them know.

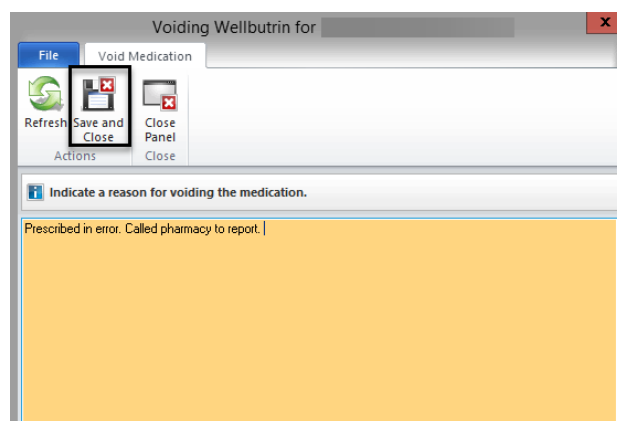
1. Select the appropriate client, and double click on the medication you wish to void in the “Medications” pane.



2. The “Medication List” for the client launches. Right click on the medication you wish to void and click, “Void.”

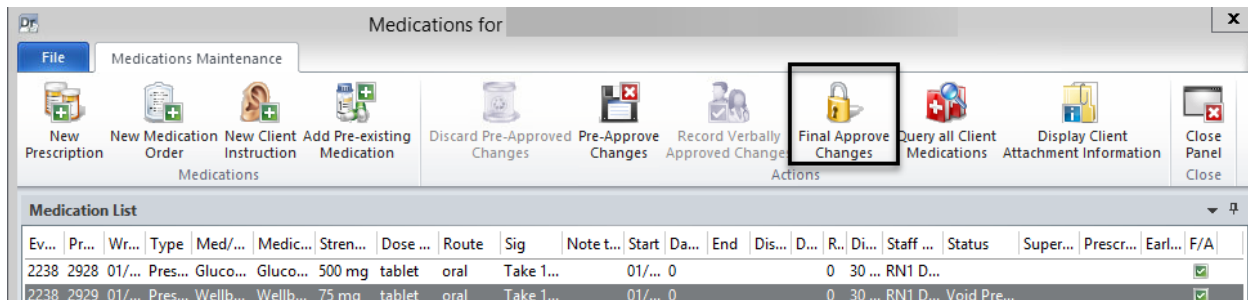


3. A new window launches which allows narrative text to be entered. Document the reason for voiding, and select “Save and Close.”



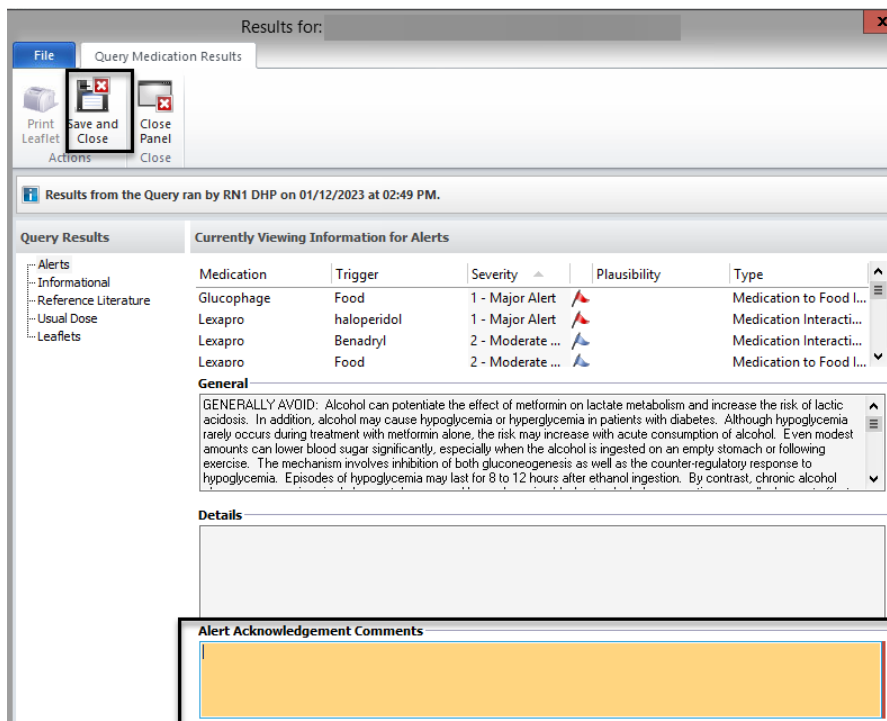


4. The “Medication Maintenance” window is launched. If you are a Prescriber, click the “Final Approve Changes” button.



*Note: Clinical Support Staff and Non-Prescribers will “Pre-Approve Changes.” See the “Pre-Approve Changes” section.*

5. The medication query automatically launches. If there is a “Major Alert,” type in the “Alert Acknowledgement Comments” field. Select “Save and Close.”



*Note: Prescribers will have to final approve (or discard) pre-approved voided medication that have been staged by their Clinical Support Staff. Also, Prescribers will have to co-sign and final approve for any Non-Prescribers they supervise. See “Prescribers: Final Approving a Pre-Approved Medication.”*



6. On the “Medication Changes” screen, selecting “Sign” will constitute as final approval.

Medication Changes for

**File**

**Client**

**Prescriber**  
RN1 DHP

Phone: Fax: NPI: 0

**Alerts**  
2 Major 0 Minor  
4 Moderate 4 General

**Void** Do Not Send - Void

**Wellbutrin 75 mg tablet**  
Take 1 tablet(s) by mouth  
#30 Tablet(s), Refills: 0, DAW: No, Date Written: 01/11/2023

Void Prescription

**Sign**

7. If “Show Voids” is selected in the filters, the voided prescription then displays in the “Medications” pane of the Client panel with a check mark in the “Voided” column.

**TEST FAKE**

**Medications**

Wr...	Med/Str...	T	Sig	Additional I...	External	Voided	Discontinued	DAW	Sample	Ref...	Renewal	Dispen...	Issue Method	Staff Name	Note to Ph...	Med Cons...	Earlie...
12/...	Glucoph...	P	Take...						0					ONE, MD			
12/...	Wellbutri...	P	Take...						0			30 / Ta...		ONE, MD			
12/...	Zoloft 25...	P	Take...						0			30 / Ta...		ONE, MD			
12/...	Ambien ...	P	Take...				✓		0			30 / Ta...		ONE, MD			
12/...	Wellbutri...	P	Take...						0			60 / Ta...		ONE, MD			
12/...	haloperi...	P	Take...						0			90 / Ta...		ONE, MD			
12/...	Wellbutri...	P	Take...			✓			0	✓		60 / Ta...		ONE, MD			
12/...	New Me...	P	Take...						0			120 / T...		ONE, MD			
12/...	haloperi...	M	Take...						0					ONE, MD			
12/...	Benadryl...	C	Ch...						0					ONE, MD			
12/...	Wellbutri...	P	Take...						0	✓		60 / Ta...		ONE, MD			

Face Sheet Pre-Intake **Medications** Medical Conditions Assessments Primary Assignm... Primary Diagnosis Primary Substan... Current Client Plan Progress Notes Primary Insuranc...



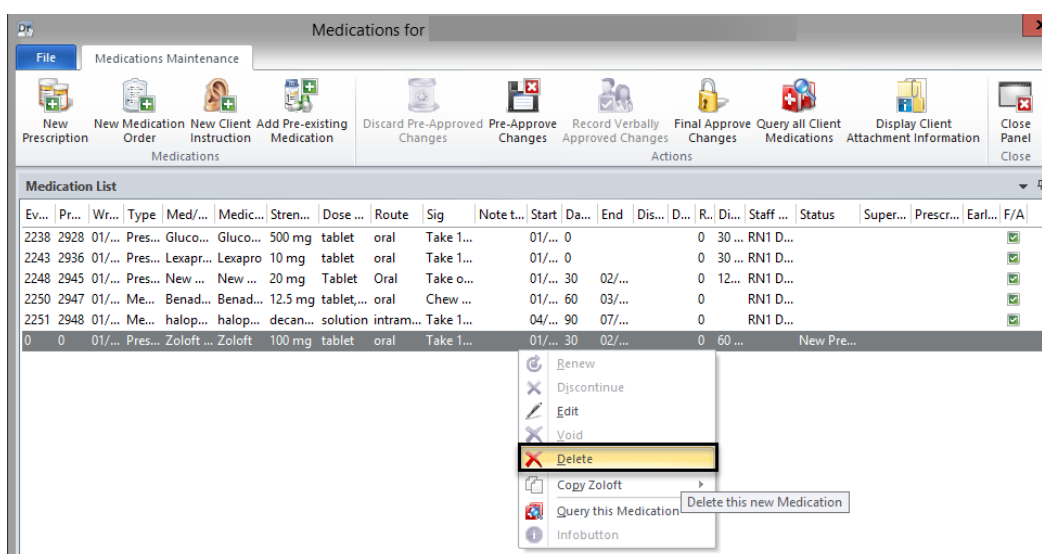
## DELETING A MEDICATION

A medication can only be deleted BEFORE it has been final approved. You would do this, for example, if you are in the middle of a prescription and realize you've made an error.

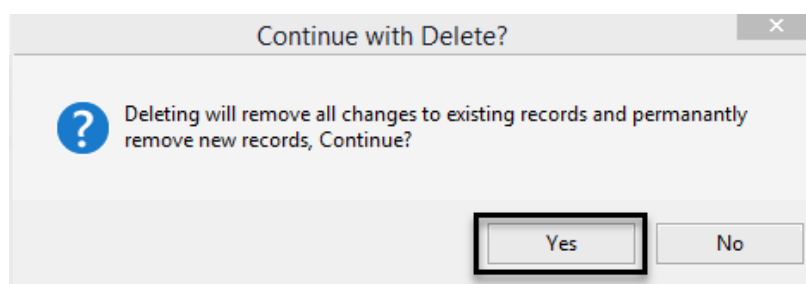
Also, Prescribers can delete medications that have been staged for them and have been “pre-approved.”

Prescribers, Non-Prescribers, and Clinical Support Staff all have access to delete.

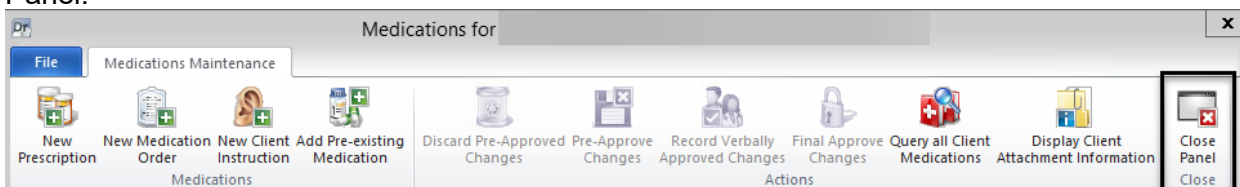
1. In the “Medication Maintenance” window, right click on the medication you wish to delete, and click “Delete.”



2. The following message will appear. Click “Yes.”



3. The medication is removed from the “Medication Maintenance” window. Click “Close Panel.”





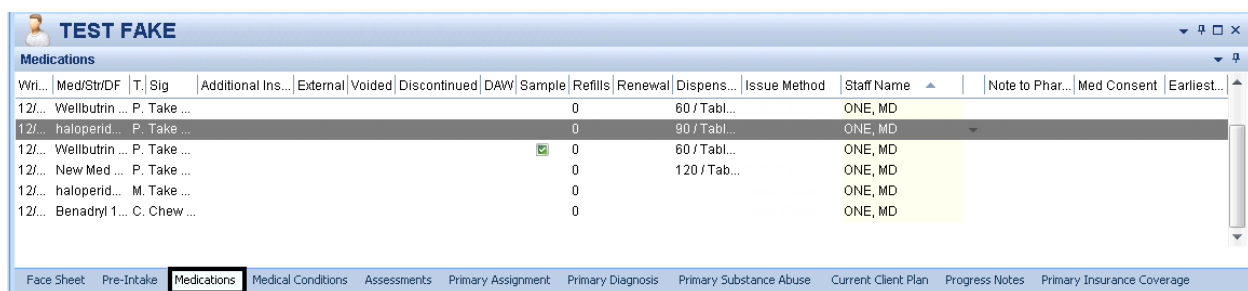
## COPYING A MEDICATION

Doctor's Homepage offers a copy medication feature. The copy feature will allow the details of a medication to be copied into a new prescription, new medication order, new client instruction or new pre-existing medication for the selected client. Any medication type can be copied to a new record of the same or any other type, regardless of the original record's approval status (pre-approved or final approved).

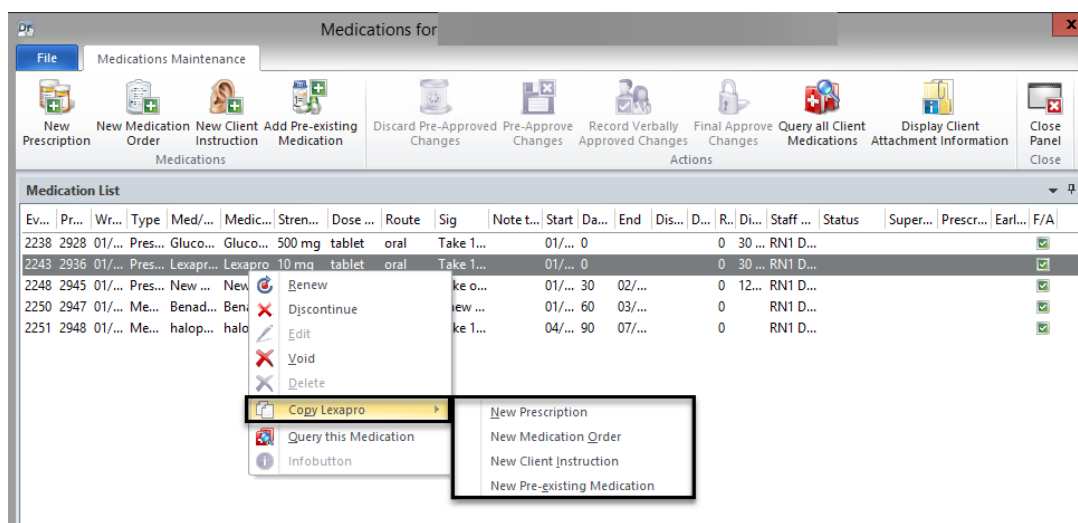
The copy medication feature allows for easy prescribing of the **exact** medication the client has already taken. DHP users will not have to re-search for the medication, re-select the correct dosage, or re-fill out the Sig Builder information.

Only data relevant to the new record will be brought forward. For instance, a pre-existing medication with an active external prescribing provider will not bring the provider's name forward to the new copied record.

1. Select the appropriate client, and double click on any medication in the "Medications" pane.



2. The client's medications appear in a new window. Right click on the medication you wish to copy. A drop-down menu appears. Select "Copy," from the submenu select the new type of prescription you would like to issue.





- Please note the fields that copy over: Medication, Strength, Dose Form, Route, and all of the Sig Builder information. The Sig Builder information remains editable on the new copied medication; however, the **Medication, Strength, Dose Form, and Route are not editable**.

Copying has no effect on the record that was copied. For example, if you want to discontinue a pre-existing medication and copy it to a new prescription, the act of copying does not end the original record. You must discontinue and then copy or copy and then discontinue. The two records are not linked in any way.

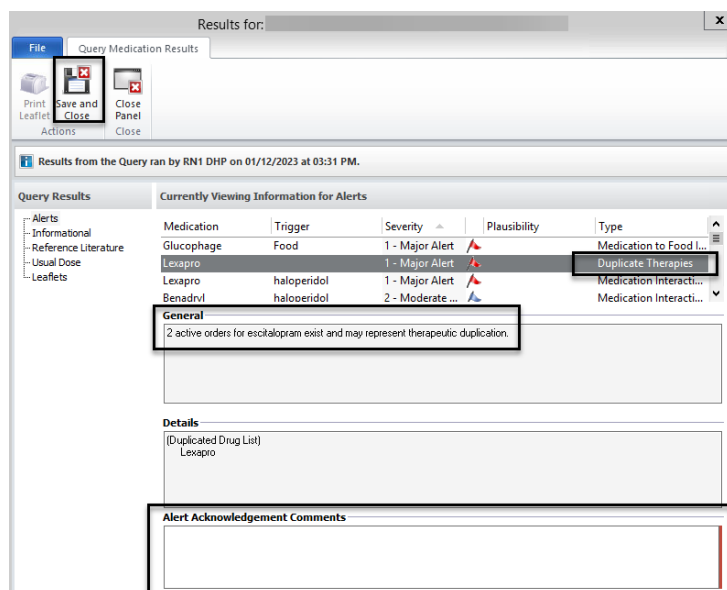
Check the fields that have carried over to ensure accuracy for new prescription. If desired, change the “Sig Builder” and “Sig Information.” Select a new “Issue Method” and select “Save.”

- If you are a Prescriber, click the “Final Approve Changes” button.

Ev...	Pr...	Wr...	Type	Med...	Medic...	Stren...	Dose...	Route	Sig	Note t...	Start	Da...	End	Dis...	D...	R...	Di...	Staff...	Status	Super...	Prescr...	Ear...	F/A
2238	2928	01/...	Pres...	Gluc...	Gluc...	500 mg	tablet	oral	Take 1...		01/...	0				0	30 ...	RN1 D...					✓
2243	2936	01/...	Pres...	Lexapr...	Lexapro	10 mg	tablet	oral	Take 1...		01/...	0				0	30 ...	RN1 D...					✓
2248	2945	01/...	Pres...	New ...	New ...	20 mg	Tablet	Oral	Take o...		01/...	30	02/...			0	12...	RN1 D...					✓
2250	2947	01/...	Me...	Benad...	Benad...	12.5 mg	tablet...	oral	Chew ...		01/...	60	03/...			0		RN1 D...					✓
2251	2948	01/...	Me...	halop...	halop...	decan...	solution	intram...	Take 1...		04/...	90	07/...			0		RN1 D...					✓
0	0	01/...	Pres...	Lexapr...	Lexapro	10 mg	tablet	oral	Take 1...		01/...	0				0	30 ...		New Pre...				

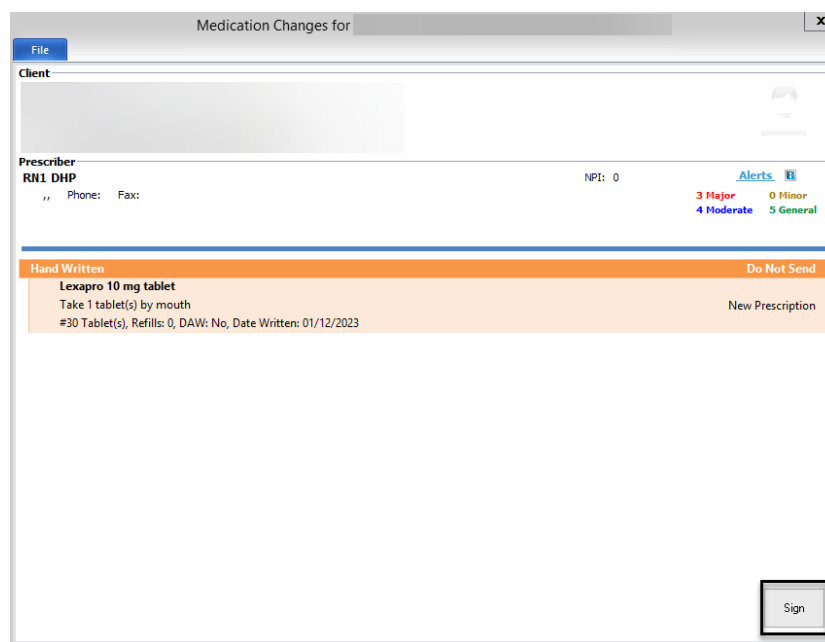


*Note: Clinical Support Staff and Non-Prescribers will “Pre-Approve Changes.” See “Pre-Approve Changes to a New Prescription (Clinical Support Staff).”*



5. The medication query automatically launches. If a user copies a medication that is still an active prescription, the query results will notify them of a duplicate medication as a major alert (even if one is listed as a pre-existing medication). CCBH will then require an acknowledgement comment. If there is a “Major Alert,” type in the “Alert Acknowledgement Comments” field. Select “Save and Close.”

6. On the “Medication Changes” screen, selecting “Sign” will constitute as final approval.



7. The new prescription then displays in the “Medications” pane of the Client Panel.



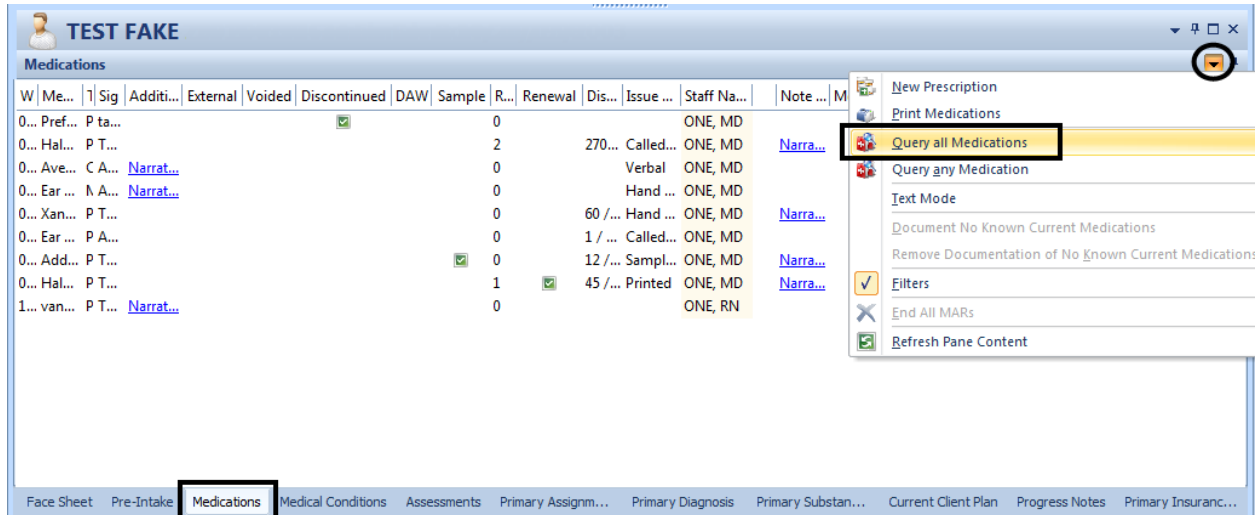
*Note: You will have to manually void or discontinue the original medication if it was incorrect.*



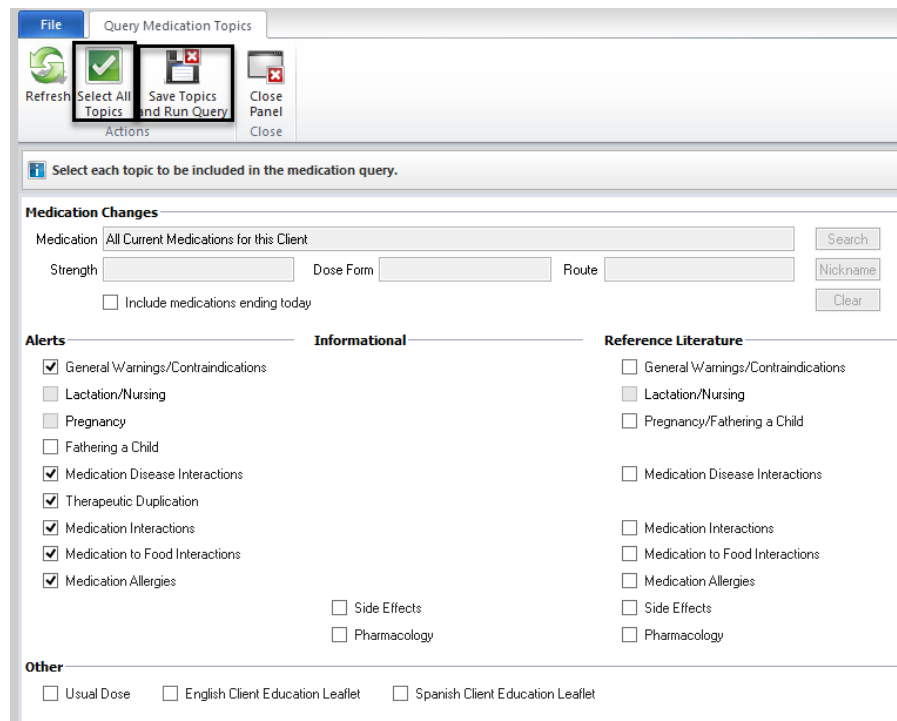
## QUERY ALL MEDICATIONS

Doctor's Homepage offers a query medication feature. This feature will allow users to query all the client's current medications at once, without having to final approve a medication. Once the query is ran it will also allow you to print medication leaflets and access reference literature.

1. On the medications pane, click the drop down arrow and select "Query all Medications".



2. Choose "Select all Topics" and then "Save Topics and Run Query".





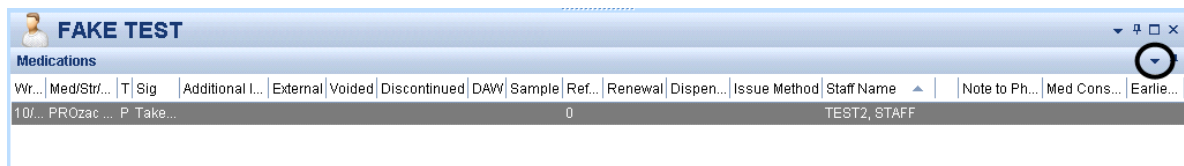
## PRINTING CLIENT MEDICATIONS

A list of the client's medications can be printed from the Medications Pane.

1. With the Client Panel open, select the “Medications” pane at the bottom of the screen.



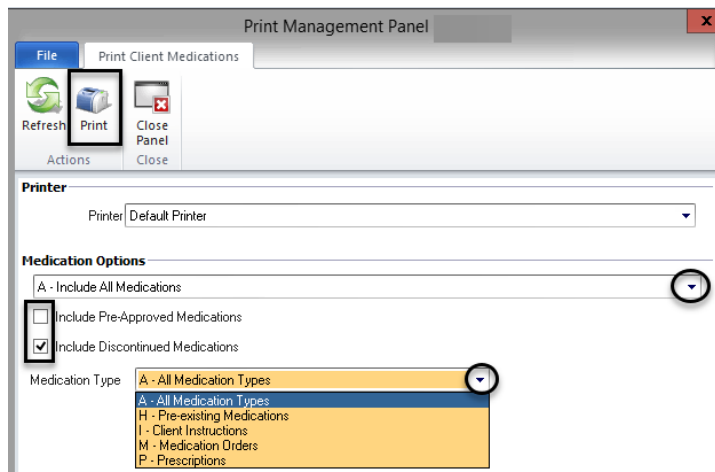
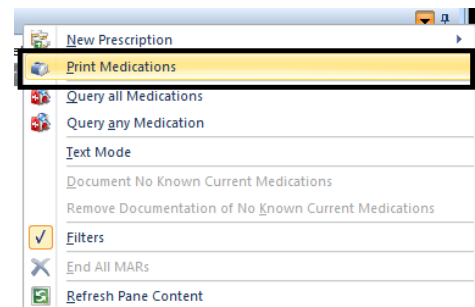
2. On the right top portion of the Client Panel, select the down arrow.



3. A drop down menu will launch. Select the “Print Medications” option.



*Note: This menu will also appear when right clicking in the white space within the Client Panel.*



4. Adjust the printing options to what is needed. Users can choose to print only a certain medication type, to include pre-approved or discontinued medications, and/or to include all medications or only current medications.

5. When finished adjusting the filters, select “Print.”



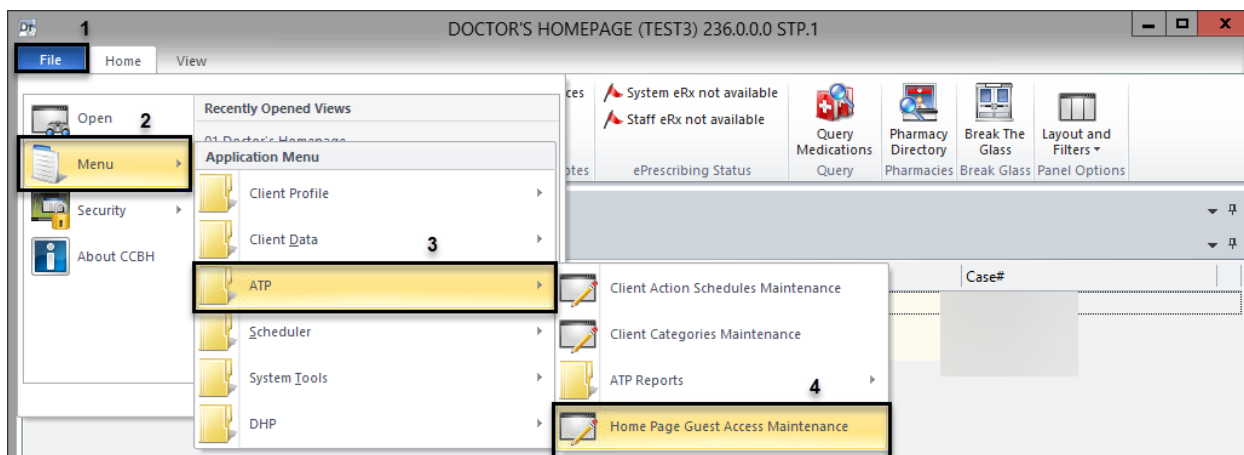
## **GUEST ACCESS**

When a staff member is away for an extended period (an illness or vacation, for example) it may be more efficient to allow another staff person to have access to his or her Clinician's or Doctor's Homepage directly, rather than have to access clients one at a time via the client search. This "Guest Access" will allow the staff person who is covering during the absence to readily see all clients on the absent staff member's caseload, as well as to see any notifications that are pending.

The process is the same for both Clinician's and Doctor's Homepage.

### **Both Doctor's and Clinician's Homepage**

Follow these steps to start the process of granting another medical staff guest access to your Doctor's Homepage:



1. Select the "File" at the top left-hand corner.
2. Select the "Menu" option.
3. Select the "ATP" option.
4. Select the "Home Page Guest Access Maintenance" option. This will launch the "Home Page Guest Access Maintenance" window in the external view.



## Both Doctor's and Clinician's Homepage

1. Enter your CCBH ID in the Staff Field:

Guest ID	Start Date	End Date	Status
			0

2. After you have entered your CCBH ID, select the “Enter” key. Your name will now populate that field.

Guest ID	Start Date	End Date	Status
			0

3. Locate the “Guest Staff Member” field in the bottom half of the window. Enter the CCBH ID number of the staff member to whom you are giving access to your DHP/CHP in this field:

Guest Staff Member: 800002

Access Granted By: Date/Time:

Access Terminated By: Date/Time:

Access Voided By: Date/Time:

Status: T - Temporary Start Date: / / End Date: / /

Comments:

Save Delete Void Find Clear Exit



4. Select "Enter" and the Guest staff person's name will populate the field.
  - a. Define if this guest access will be "Temporary" or "Permanent" by selecting the appropriate choice from the drop-down menu attached to the "Status" field (it is recommended that you make Guest Access "Permanent" for staff person who works in your Unit/SubUnit on a regular basis so that they can fill in easily for you if you need to be out of the office unexpectedly).
  - b. For "Temporary" access, you will have to specify both the "Start" and "End" dates for the access. For "Permanent" access, you must designate the "Start" date only.
  - c. Select "Save."

Guest Staff Member: STAFF, MD 800002 ☐ Allow to assign Guests?

Access Granted By: Date/Time:

Access Terminated By: Date/Time:

Access Voided By: Date/Time:

Status: T - Temporary Start Date: / / End Date: / /

Comments:

**Save** Delete Void Find Clear Exit

5. The staff person to whom you gave guest access will now appear as listed in the white section under the "Staff" name field at the top of the window:

Home Page Guest Access Maintenance (Full Access)

Staff: RN1 DHP 910001

Guest ID	Start Date	End Date	Status
800002 STAFF, MD	01/12/2023	01/19/2023	Temporary

6. Repeat steps 7 – 9 for additional staff persons to which you want to give guest access.



*Note: Per County policy, you are **never** to check the “Allow to assign Guests” check box. To do so is a violation of County policy.*

Guest Staff Member:	<input type="text"/>		<input type="checkbox"/> Allow to assign Guests?
Access Granted By:	<input type="text"/>		Date/Time: <input type="text"/>
Access Terminated By:	<input type="text"/>		Date/Time: <input type="text"/>
Access Voided By:	<input type="text"/>		Date/Time: <input type="text"/>
Status:	<input type="text" value="T - Temporary"/>	Start Date: <input type="text" value="/ /"/>	
		End Date: <input type="text" value="/ /"/>	
Comments:	<input type="text"/>		



---

## **INSTRUCTIONS FOR SYSTEM OUTAGE**

Once you have been trained to use the DHP in CCBH, the expectation is that all new medical condition information and medications will be entered into CCBH via the Doctor's Homepage. In the event of a system outage, use the Medical Condition Review Form (available on the Optum Website) for documenting a client's vitals, allergies and medical conditions. Write prescriptions as you would on paper to capture information. Enter the Medical Condition Review and prescription information into the DHP as soon as the system becomes available again. Please follow the instructions below:

### Medical Condition Review Form:

- Fill in the appropriate form with as much detail as is necessary to deem it complete.
- Print clearly and legibly.
- Be sure client first name and last name match client name as found in CCBH.
- Be sure to include Client Case Number
- Include staff person's complete name and CCBH Staff ID Number

### Prescriptions/Medications

- Complete the prescription as you would on paper and follow what has been procedure prior to access to the DHP.
- Enter the information into the DHP for the client as the system becomes available. You will not transmit electronically – make sure to mark the prescription method appropriately (handwritten, called in or faxed, for example).



## **EXPECTATIONS AFTER TRAINING**

The expectation is that you will use DHP as soon as trained. E-prescribing is the preferred method of sending prescriptions to pharmacies.

Please prioritize as time allows and, as clients come in for their next appointment, try to complete the following:

1. Medical Conditions Review
2. Enter any medications currently taken as “Pre-Existing Medications”
3. Enter any new prescriptions or adjustments to current medications

The query feature utilizes all information (Medical Conditions Review, Pre-existing Medications, New Prescriptions, OTCs, etc.) so the more information in the system, the more complete the query will be.

You are also encouraged to print and distribute the educational leaflets for new medications to the client.



*Note: If a doctor is trained with Clinical Support Staff at one program or company, but also works at another program or company where no others are trained, the expectation is that doctor will use DHP in BOTH places. This means that the doctor may work in a setting where staging is done by the Clinical Support Staff trained in DHP, but the doctor may have to enter all information independently in the program or company where the Clinical Support Staff are awaiting training.*

*Each legal entity you work for must submit the DHP ARF and new user list. These forms are not pre-requisites for training, but they are pre-requisites for LIVE access. If you do not have LIVE access, please follow up with your admin regarding these forms prior to calling the Optum Support Desk.*

*For Clinical Support Staff trained before doctors at their program, the expectation is that the nurse will complete the Medical Conditions Review and enter Pre-existing Medications in the DHP.*





## Support Desk Contact Information

**sdhelpdesk@optum.com**

**1-800-834-3792**

### Monday through Friday (E-mail)

Hours	Services
6:00 am to 6:00 pm	All services except password resets or any service involving PHI

### Monday through Friday (Telephone)

Hours	Services
4:30 am to 6:00 am	Resetting passwords (24 hour programs) and reporting system outages*
6:00 am to 6:00 pm	All services
6:00 pm to 11:00 pm	Resetting passwords (24 hour programs) and reporting system outages*
11:00 pm to 4:30 am	Reporting system outages*

### Weekends (Telephone)

Hours	Services
4:30 am to 11:00 pm	Resetting passwords (24 hour programs) and reporting system outages*
11:00 pm to 4:30 am	Reporting system outages*

\* By definition, a system outage affects multiple users. Examples include when:

- The system does not respond and appears to be frozen
- No data can be entered or viewed

## Support Desk Suggestions

- Please consult with your program manager and your resource packet prior to contacting the Support Desk.
- When calling for a password reset on weekdays between 4:30-6a or 6-11p, or calling weekends between 4:30a-11p, you must leave a message. Include your name, CCBH staff ID, phone number and the reason for your call.
- You may be given a ticket/tracking number if you call between 6:00a and 6:00p Monday through Friday. Remember to keep this number for future reference.

## Additional Contacts

Questions	Where To Go
Clinical Documentation Questions	Documentation Manual/Your Program Manager
Duplicate Clients and Name/DOB/Gender/SSN Changes	Complete Form BHS-025 and Call Medical Records: 619-692-5700 x 3
Financial Questions (UMDAP/Insurance)	Billing Unit: 619-338-2612 Fax- 858-467-9682
Online User Manuals and Forms	<a href="http://www.optumsandiego.com">www.optumsandiego.com</a>
Service Codes	CCBH (Anasazi) User Manual/QM Unit



## APPENDIX

### LIST OF MODIFIERS IN THE SIG BUILDER

Sig Builder					
<input type="checkbox"/> Free Text	Action	Dose Qty	Unit	Route	Frequency
<div> <div>Modifiers</div> <div></div> </div>					

#### **A:**

AA- Avoid Alcohol

AC- Before Meals

#### **C:**

CF- With Food

CMI- With Milk

CW- With Water

#### **E:**

EST- On an Empty Stomach

#### **N:**

NTE- Not to Exceed

#### **P:**

PC- After Meals

PRN- As Needed

#### **S:**

SOS- If There Is Need

#### **U:**

UF- Until Finished

#### **W:**

W- With

W/O- Without