Single Patient Mode Training Manual

Updated: 12/27/2019

DrFirst

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Definitions

- **Category Search:** Using therapeutic categories to find the drug you wish to prescribe
- **Co-pay:** The flat rate or dollar amount the patient will pay for his or her prescription
- **Coinsurance:** The percentage the patient will pay for his or her prescription
- **Electronic prescription:** A prescription sent directly from the provider to a pharmacy through SureScripts
- **Prescription Benefit:** This determines whether the patient has a prescription drug benefit
- **Enter details screen:** The screen where components of the prescription are entered, including the sig
- **Favorite Prescription:** A medication that you routinely prescribe for your patients
- **Fax prescription:** A prescription sent directly to the pharmacy fax machine
- **Formulary:** A list of drugs that provide information on coverage and copays from the patient's insurance or health plan
- **Formulary coverage codes:** Codes which determine prescription drug benefit coverage for a particular medication, such as step therapy (ST), or prior authorization (PA)
- **Formulary status:** The coverage status determined by a patient's health plan. A drug can have formulary or non-formulary status, or preferred status, such as P1, P2, etc.
- **Medication:** A drug that the patient is already taking
- **Medical History:** A list of medications that the patient has taken in the past; this information may be obtained from the health plan or PBM or pharmacy
- **Prescription:** An oral, written, faxed or electronic order of medication
- **Prescription status:** This status provides transmission information on the prescription you sent and whether it has been received by the pharmacy
- **Provider**: A health care professional such as a MD, DO, NP, PA
- **Refills:** The number of times a prescription can be refilled at the pharmacy without requiring a new prescription
- **Pharmacy Message:** A request from the pharmacy to obtain additional refills on a prescription or receive an updated prescription
- **Sig:** Instructions for the patient on how to use or take his or her prescription, including amount and frequency

Overview

The DrFirst Portal API allows partners to launch an Rcopia Web session from an

external system, such as a web portal or an EMR system. This is a single sign-on solution; logins are authenticated between the partner and Rcopia, so users only need to log on to the partner system and then navigate to Rcopia. DrFirst also offers a private label option that allows the partner to have their logo displayed in Rcopia. Portal API access is frequently implemented with one-way or two-way data interface calls. The partner can upload data to Rcopia, such as patient demographics, and then download records generated by Rcopia, such as medications and prescription orders.

By default, all features of Rcopia Web are fully available to partner users. Some partners, however, wish to strictly control access to patient records in Rcopia. This is often needed to support business rules within the partner system, such as a requirement that prescriptions be created within the context of an office encounter. The partner may also want to retain control over data that need not be changed in Rcopia, such as patient demographics, allergies, and problems.

In order to meet these needs, the partner may elect to use Single Patient Mode (SPM). In this mode, certain controls are disabled in Rcopia to restrict the user's ability to change patient data and to prevent the user from navigating to a different patient within Rcopia. In Single Patient Mode, patient selection is done entirely in the partner system, and then Rcopia is launched with that patient selected. To select a different patient, the Rcopia session is closed, and another patient is selected from the partner system.

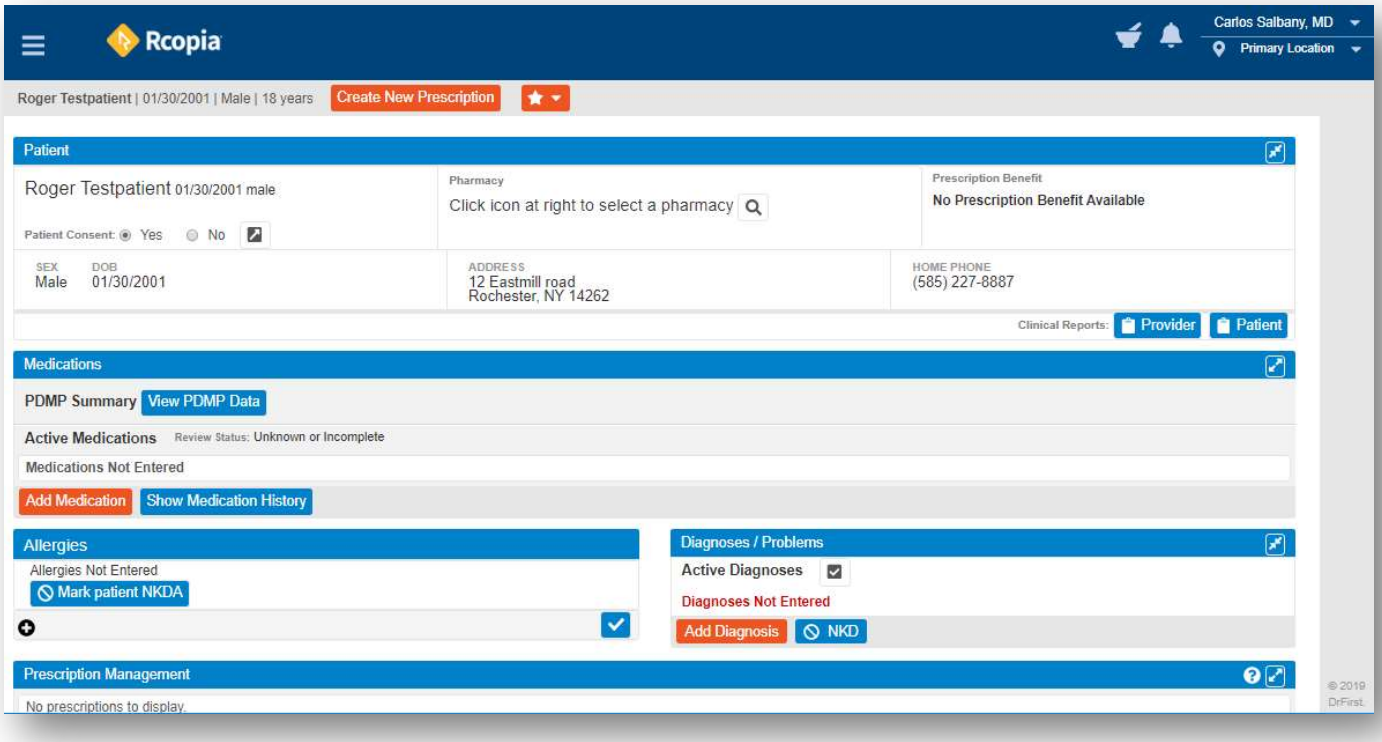
Feature	Standard Rcopia	Single Patient Mode
Patient Selection	Any patient; may select within Rcopia	One patient per session; selected in partner system
Edit Patient Demographics	Yes	No
Edit Medications	Yes	Yes
Edit Allergies	Yes	Optional
Edit Problems	Yes	Optional
View Renewals	All pending	Pending for one patient only
View Pending Prescriptions	All pending	Pending for one patient only

Logging In

In a Single Sign On (SSO) mode, you will launch into Rcopia onto the **Patient Info** screen shown below when you select a patient in your partner system.

You can quickly enter a patient's pharmacy by clicking on the **Please set the default pharmacy link** at the top of the screen or by clicking on the search icon in the patient info section.

Depending on your integration, if users manage allergies on the DrFirst side, the user will need to add in the allergies for their patient. This can be accomplished through the **Please set the default pharmacy** link at the top of the screen or by clicking the magnifying glass icon below the **Pharmacy** section.

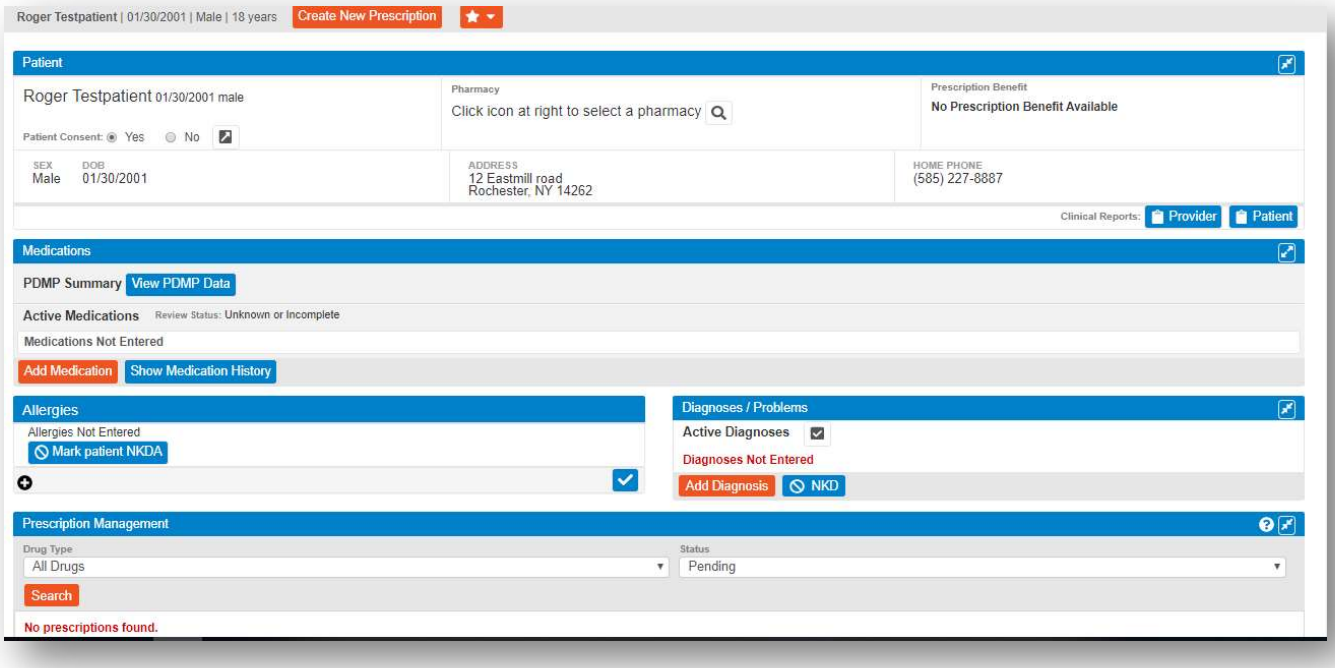


Patient Info Screen

The **Patient Info Screen** is an individual patient's "homepage," where an Rcopia 4 user can access the patient's basic information through Rcopia's widgets: demographics, medications, allergies, problems, and pending prescriptions.

The information and actions available for your users will depend on your integration.

Please Note: On any page in Rcopia 4, clicking the patient name within the context bar will bring you back to the **Patient Info Screen**.



Practice Information

In the top right-hand corner, you will see the name of location you are prescribing from.

If you are connected to more than one location, you will have the option to click on the location name. In doing so, you will see a drop down of all locations you are connected to.

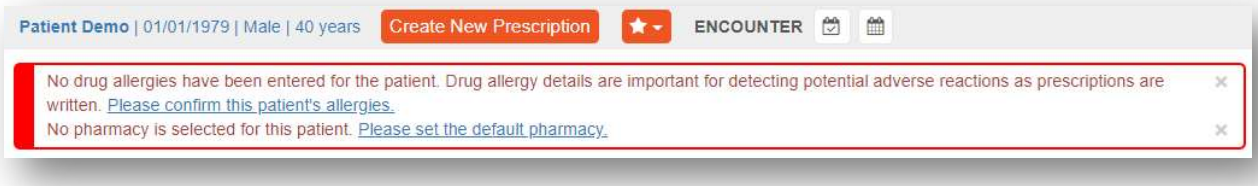
Be sure to always review this prior to prescribing for your patient to ensure the correct practice information displays on the prescription heading.

Patient Demographic Information

Within the patient section, you will see various demographic fields for the patient including First Name, Last Name, Sex, DOB, Home Phone, and Address. You will note other fields such as Height, Weight, and Preferred Language will display in this section.

Encounter Information

Within Rcopia 4, you can manage a patient's encounter, which marks in the system when you saw the patient. To accomplish this, simply click on the check box icon within the **Encounter** section of the context bar.



If you wish to input previous encounters or document a transition of care, simply click on the calendar icon. This will open the **Patient Encounter Management** widget.

You can select the Rendering Provider, document a Transition of Care, add encounters, and edit previous encounters.

Pharmacy Information

The **Pharmacy** drop-down box holds information for up to five pharmacies for the patient. Here you can easily search for new pharmacies and remove pharmacies that are no longer needed. You can also obtain pharmacy information such as NCPDP, address, phone, and fax.

Prescription Benefit

Prescription Benefit information is obtained from SureScripts and payer claims data. If a patient has multiple plans, select the correct benefit plan by clicking on the drop-down arrow within **Prescription Benefit**. A patient's prescription benefit information allows Rcopia 4 to alert users on medications that are on or off formulary and offer on-formulary alternatives when applicable.

Pharmacy Messages

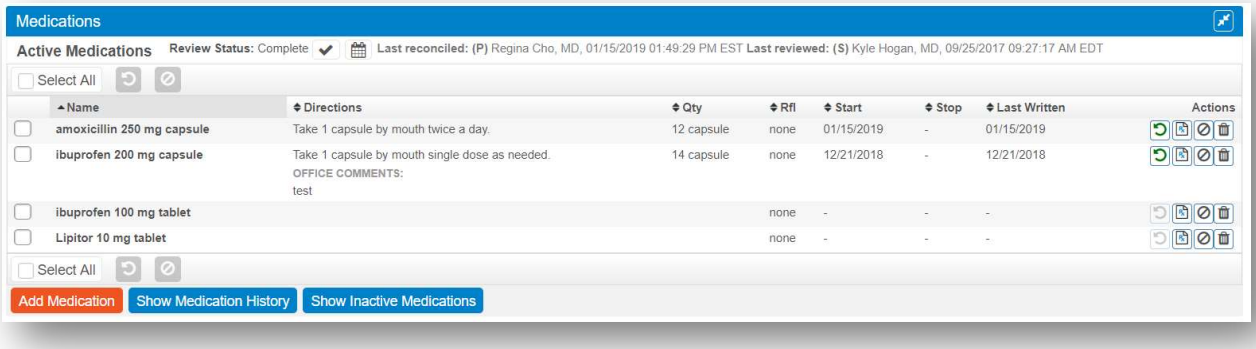
The practice's renewal requests from pharmacies can be accessed on any screen in Rcopia 4 by clicking the **Pharmacy Message** Icon on the top right of the screen or accessing the **Pharmacy Message** section within the patient record.

Create New Prescription

You can quickly search for a medication to write a prescription manually, or you can utilize your favorites list to select a previously favored medication.

Medications

Within the **Medications** section, any active medications for a patient will be displayed. You can quickly manage medications by adding in a new medication, starting or stopping a medication, or even renewing or prescribing a medication.



Allergies

Within the allergies section, you can document a patient's allergies or adverse reactions to medications.

Please reference the **Allergy Management** portion of this manual for more information.

Diagnoses/Problems

This section allows you to record a patient's list of conditions, diagnoses, and symptoms by conducting a search using name of the condition or ICD-9, ICD-10, or SNOMED CT code. Recording this information is particularly important for drug-diagnosis interaction checking.

In addition, by populating this information, you will be able select a diagnosis within the **Prescribe Medication** widget and the diagnosis will be placed on the prescription.

Please reference the **Diagnosis/Problem Management** portion of this manual for more information.

Prescription Management

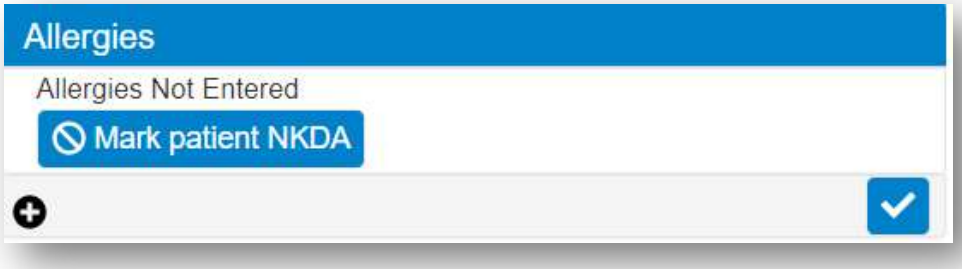
The **Prescription Management** widget will display any pending prescriptions for a patient. This is where a provider or provider agent will send prescriptions.

Please reference the **Create Prescriptions** portion of this manual for more information.

Allergy Management

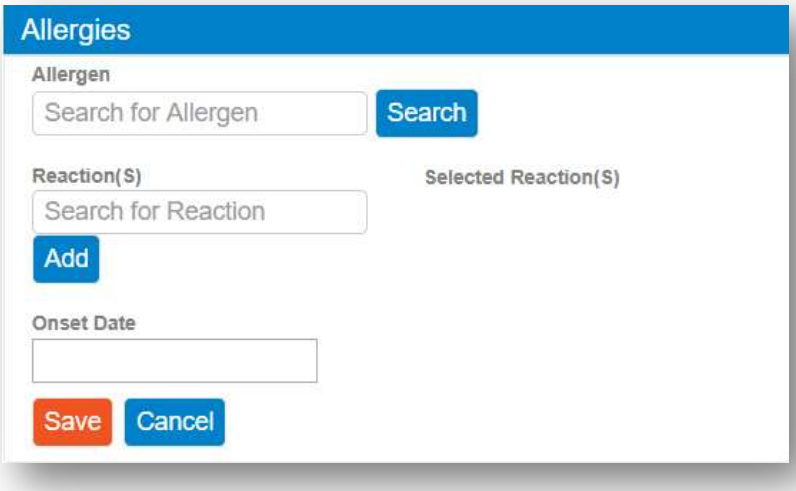
There are a few ways to add an allergy into a patient's record within Rcopia 4. If you have yet to add allergies for a patient, a notification will display at the top of the screen.

1. If the patient has no known allergies click on the **Mark patient NKDA** button.

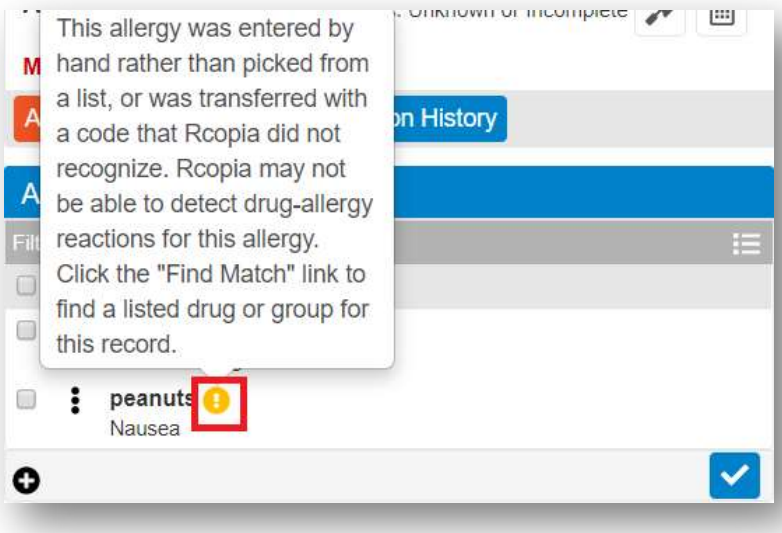


2. To search for and record an allergy click on the **+** button. This will open an **Allergy Search** screen.

    a. On the **Allergy Search** screen, use the search field to search for the patient's allergies and select allergies from the results in the matched allergy results
    b. After selecting the patient's allergens, use the **Reaction(s)** search box to define the reactions and use the **Onset Date** field to input an onset date

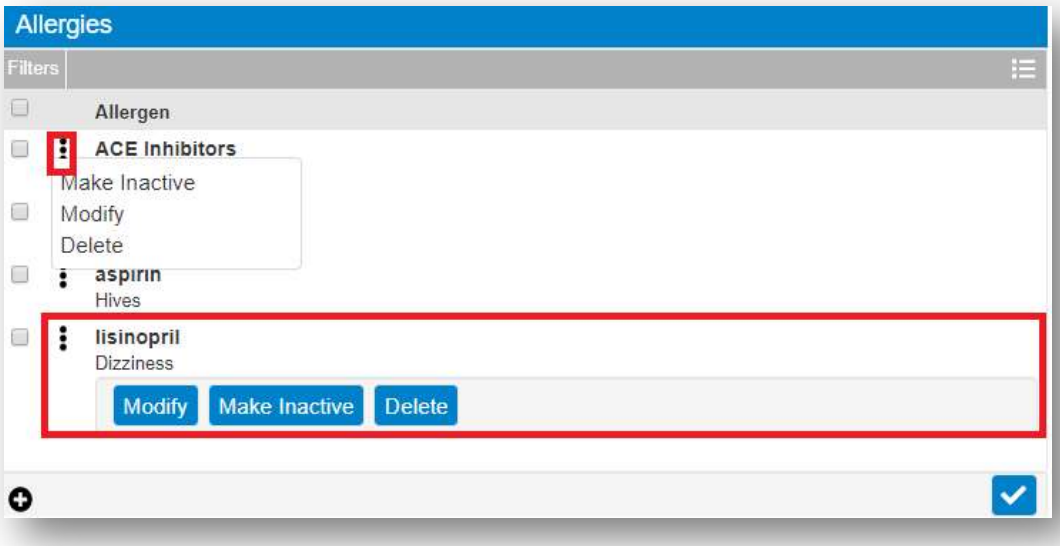


    c. **Non-Drug-Related Allergy**: For any non-medication allergies, search for the allergy, and click the **Enter free text** link to add the allergy
    d. Once complete, click the **Save** button
    e. Repeat the previous steps for each allergy

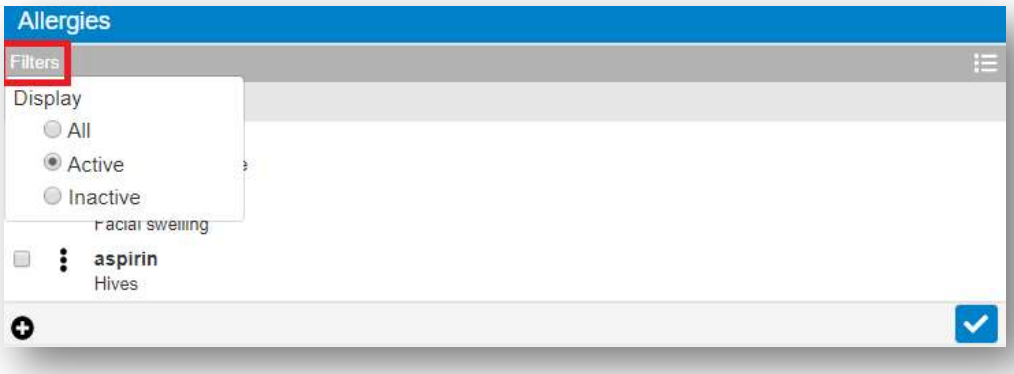


Please Note: If a yellow exclamation mark icon displays next to an allergy, this indicates that Rcopia 4 does not conduct a drug-allergy check because the allergy was entered as free text

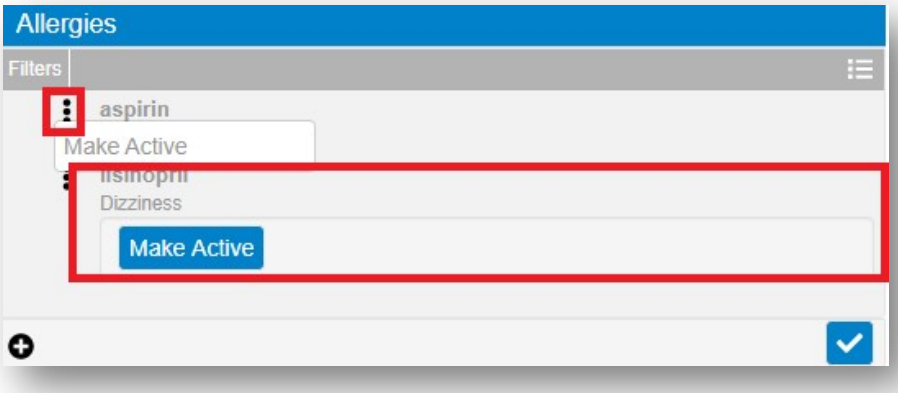
3. Once you have entered all allergies for the patient, you can mark the allergies as reviewed by clicking the check box in the lower right-hand corner of the **Allergy** widget
4. By clicking anywhere within an allergy cell or by hovering over the vertical ellipses, the options to **Make Inactive**, **Modify**, or **Delete** an allergy will be made available



5. If you make an allergy **Inactive**, it will be placed in the inactive allergies list, which can be accessed by hovering over filters and selecting **All** or **Inactive**.



6. To re-activate an inactive allergy, either hover over the three vertical ellipses or click on the allergy cell for the respective inactive allergy, and click the **Make Active** icon



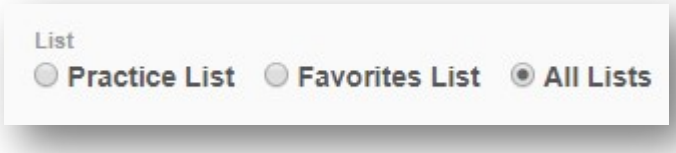
Pharmacy Management

Adding a Pharmacy

Once you add a patient into Rcopia 4, you will be prompted to add a default pharmacy for the patient before you can begin prescribing. This can be achieved by clicking on the notification at the top of the patient record on the **Patient Info Screen**, or by clicking the **Change** icon within the **Patient Info** widget.

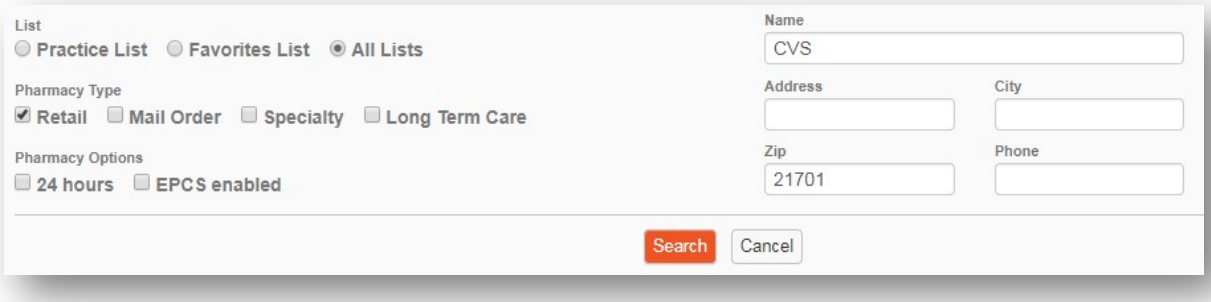
Once you launch the **Select Pharmacy** widget, follow the steps below to add in a pharmacy for a patient.

1. Select the pharmacy list from which you would like to search. There are three list options that you can search within (as seen below).

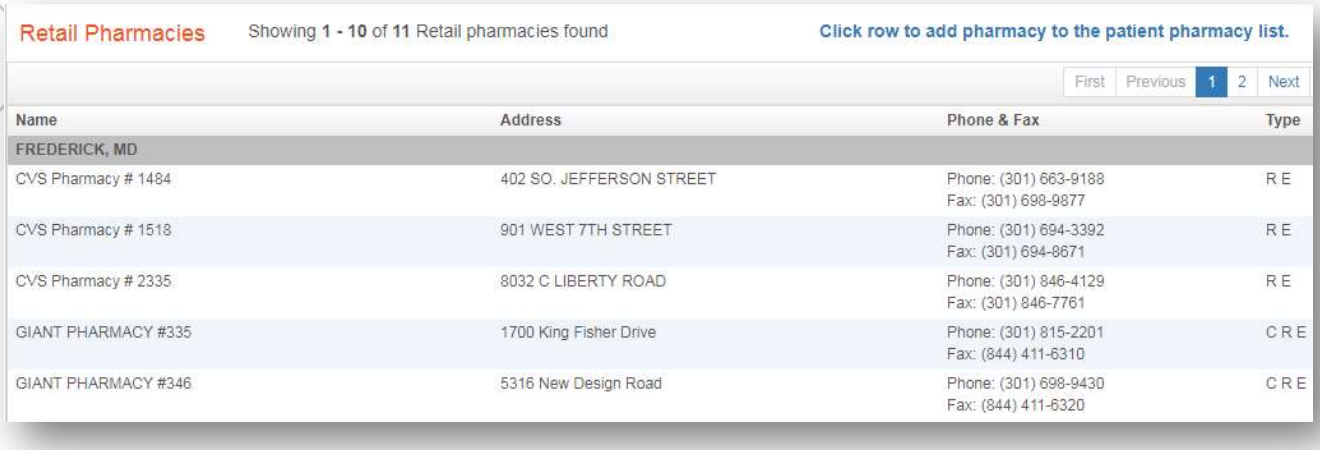


   a. **Practice List**: contains only those pharmacies located within the first three digits of the practice's ZIP code.
   b. **Favorites List**: contains only the pharmacies that the individual user has previously selected to be in his or her favorites list.
   c. **All Lists**: contains all available pharmacies in the Rcopia 4 database (default option).

2. Enter the search criteria for the pharmacy and click **Search**.



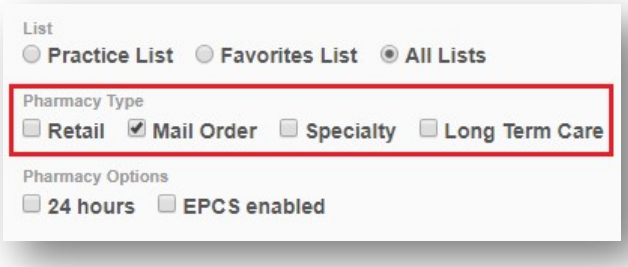
3. You will then be presented with a listing of pharmacies within your search criteria (as seen below).



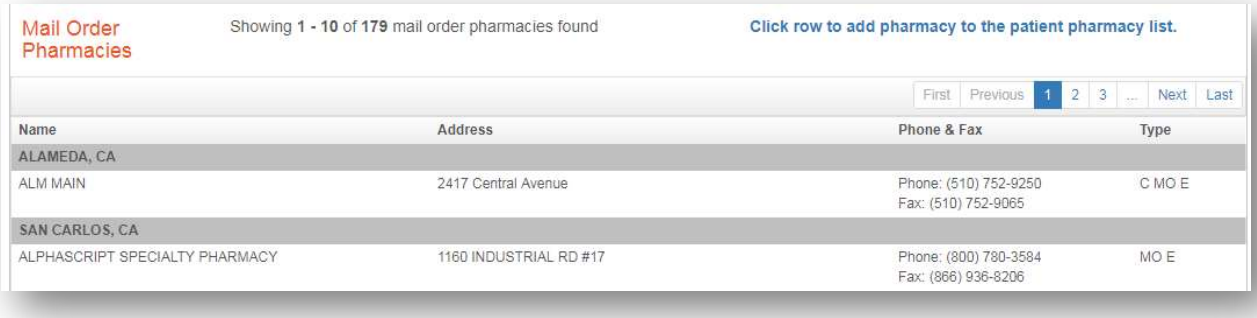
4. Click within the row to add the pharmacy to the patient's record. Please ensure the pharmacy type before making your selection. If you hover over the type, Rcopia 4 will display what it is.
    - (C) – Indicates the pharmacy accepts controlled substance prescriptions electronically.
    - (E) – Indicates the pharmacy accepts electronic prescriptions.
    - (R) – Indicates the pharmacy is a retail pharmacy.
5. After adding the desired pharmacy, you will be routed back to the **Patient Info Screen**. You can store up to five pharmacies for a patient, which will be saved in the **Pharmacy** drop-down box within the **Patient Info** section.

Send to a Mail Order Pharmacy

1. If you would like to choose a mail order pharmacy for a patient, make sure to select the **Mail Order** box on the pharmacy search screen.



2. To select a pharmacy, click on the row to add the pharmacy to the patient's record.



3. The mail order pharmacy will then display within the pharmacy drop-down list in the **Patient Info** widget.

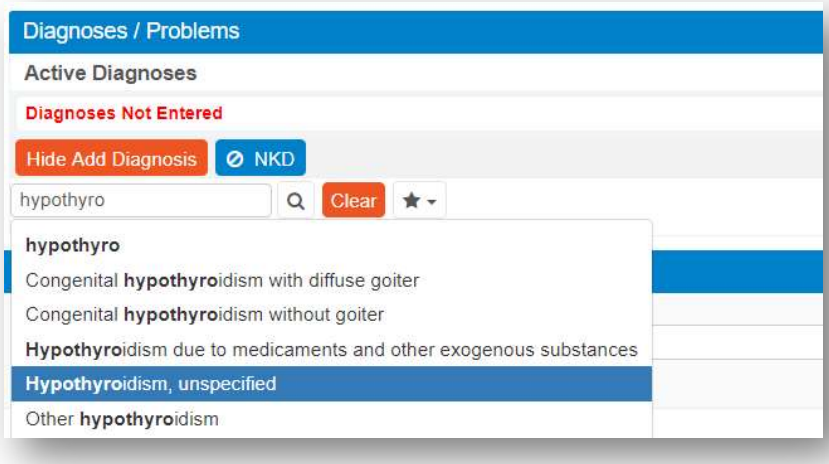
Diagnoses/Problems Management

Within Rcopia 4, users have the ability to enter diagnoses/problems for a patient. This can be beneficial for a number of reasons including drug-diagnoses interaction checking and the ability to easily add a diagnosis to a prescription.

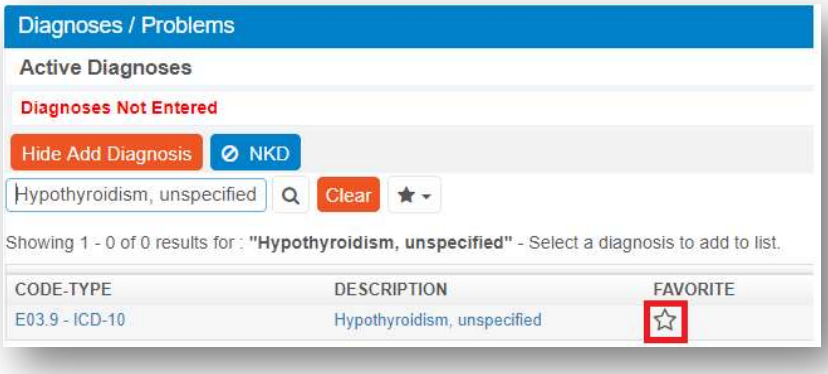
The **Diagnoses/Problems** widget can be found next to the **Allergies** widget on the **Patient Info screen**.

1. Click on the **Add Diagnosis** button to begin, or click the **NKD** button if your patient has no known diagnoses.

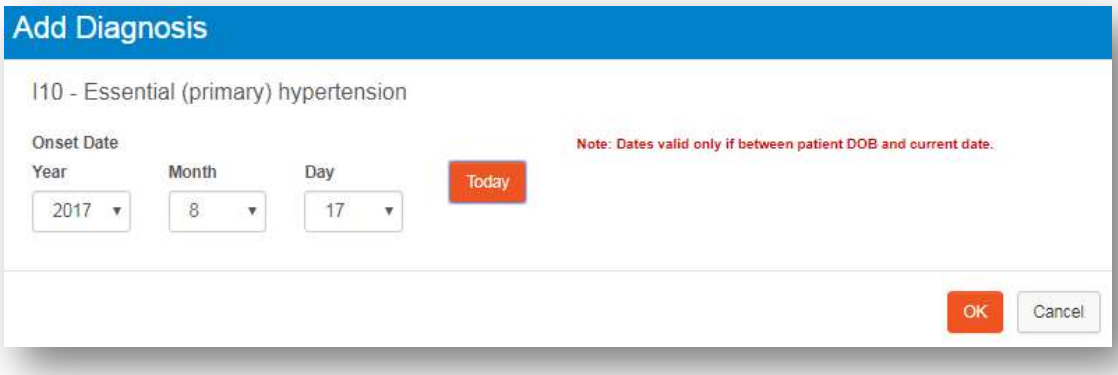
2. Input the specific diagnosis code or description of the diagnosis you are looking for. As you begin typing, results will start to display. Either select a diagnosis from the drop-down or click the **Search** icon to display all results.



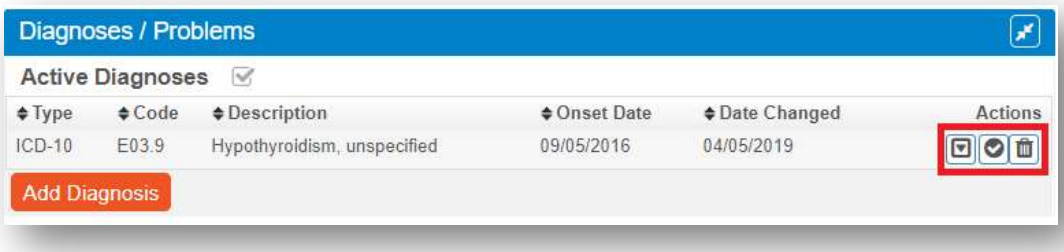
3. To select the diagnosis, click anywhere within the row. You can favor a diagnosis to add it to your favorites list by clicking on the star icon.



4. You will then be able to enter the onset date for the diagnosis if applicable, and click the **OK** button to add the diagnosis to the patient record.



5. Once added to the patient's record, any diagnoses will display within the **Diagnoses/Problems** widget. Users can manage diagnoses by clicking on one of the three action icons. These include making a diagnosis inactive, marking a diagnosis as resolved, and deleting a diagnosis.



Medication Management

The **Medications** widget on the **Patient Info** screen lists the patient's current active medications, whether they are prescribed by you or another provider within the practice. Medications can be added to a patient's Medication list in one of two ways:

Obtaining Medication History

Rcopia 4 has the ability to obtain medication history for up to one year for patients from SureScripts. SureScripts receives medication information from two sources, Pharmacy Fill data and Payer Claims information.

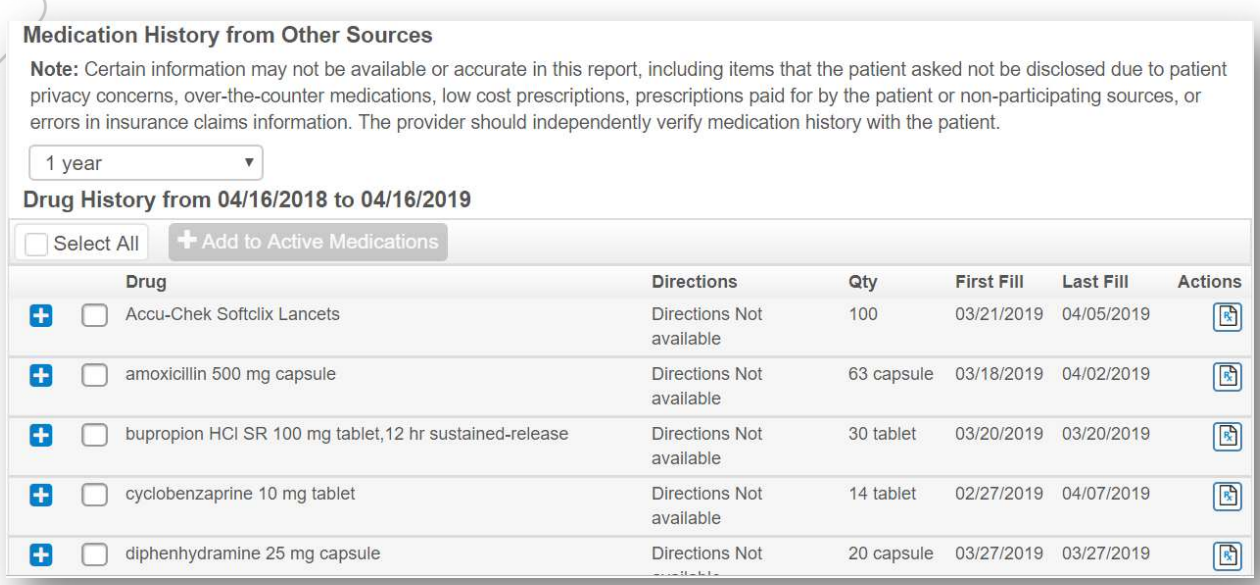
To pull a patient's medication history, complete the following steps:

1. In order to use this feature, you must indicate that the patient has given consent to view his/her medication history by toggling the **Yes** option, shown below.

2. Click on **Show Medication History** from within the **Medications** widget.

3. Patient medication information is displayed according to his or her primary insurance company's records. If the patient has more than one insurance company, this information will be listed for selection in the Pharmacy Benefit drop-down list.

4. Use the drop-down list to select the appropriate time period.



Medication History from Other Sources

Note: Certain information may not be available or accurate in this report, including items that the patient asked not be disclosed due to patient privacy concerns, over-the-counter medications, low cost prescriptions, prescriptions paid for by the patient or non-participating sources, or errors in insurance claims information. The provider should independently verify medication history with the patient.

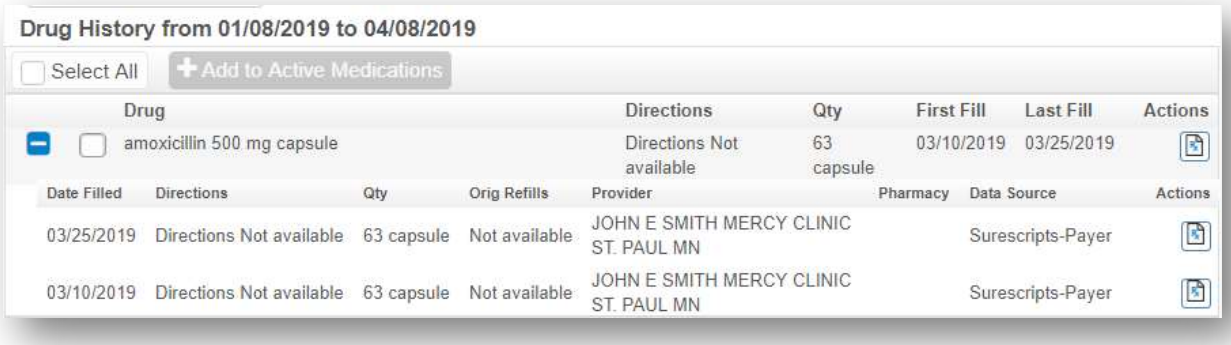
1 year

Drug History from 04/16/2018 to 04/16/2019

Select All | + Add to Active Medications

Drug	Directions	Qty	First Fill	Last Fill	Actions
Accu-Chek Softclix Lancets	Directions Not available	100	03/21/2019	04/05/2019	
amoxicillin 500 mg capsule	Directions Not available	63 capsule	03/18/2019	04/02/2019	
bupropion HCl SR 100 mg tablet,12 hr sustained-release	Directions Not available	30 tablet	03/20/2019	03/20/2019	
cyclobenzaprine 10 mg tablet	Directions Not available	14 tablet	02/27/2019	04/07/2019	
diphenhydramine 25 mg capsule	Directions Not	20 capsule	03/27/2019	03/27/2019	

5. The results will display (as seen below). By clicking on the **+** signs, you can see a more detailed record of the patient's medication history, including sig, prescribing provider, pharmacy where it was filled, quantity, and refills (a clue to compliance).



Drug History from 01/08/2019 to 04/08/2019

Select All | + Add to Active Medications

Drug	Directions	Qty	First Fill	Last Fill	Actions
amoxicillin 500 mg capsule	Directions Not available	63 capsule	03/10/2019	03/25/2019	

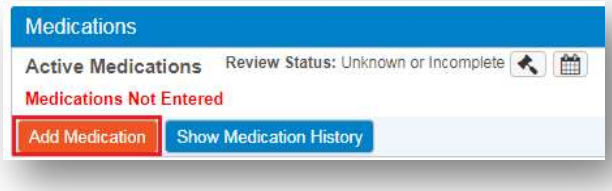
Date Filled	Directions	Qty	Orig Refills	Provider	Pharmacy	Data Source	Actions
03/25/2019	Directions Not available	63 capsule	Not available	JOHN E SMITH MERCY CLINIC ST. PAUL MN		Surescripts-Payer	
03/10/2019	Directions Not available	63 capsule	Not available	JOHN E SMITH MERCY CLINIC ST. PAUL MN		Surescripts-Payer	

6. Medications can be added by checking the box to the left of the medication's listing and clicking on the **Add to Active Medications** button. This will copy all of the medication's information to the patient's active medication list.

7. If a medication on the patient's medication history is already added as an **Active Medication**, it will display as gray in color and with an italicized font (as seen below). Hovering over the medication will indicate to users that it is already marked as active.

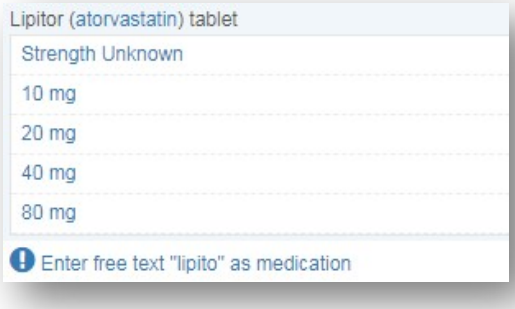
Add an Active Medication

1. Click the **Add Medication** button from the Medications widget.



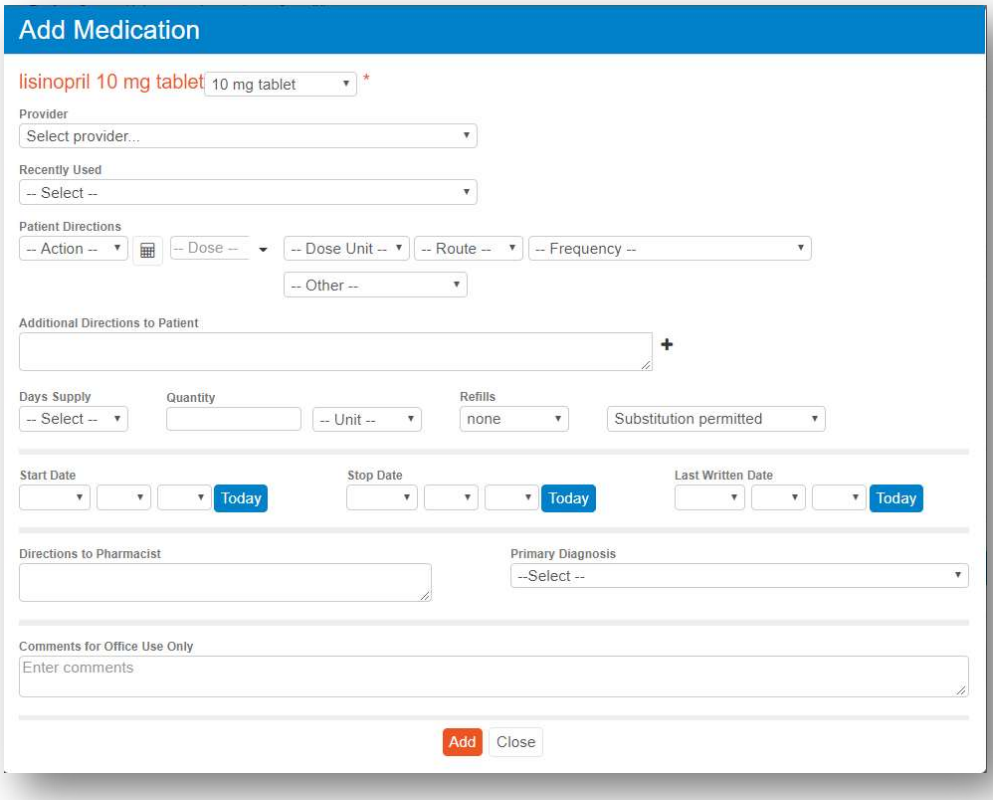
2. There are a few ways to add a new medication to the patient's active medication list:
   a. Choose from the Favorites list by using the drop-down menu.
   b. Type in part of and/or the drug's entire name in the Search box. Choose the appropriate medication from the resulting list.

3. After selecting the medication, click on the desired strength to launch the **Add Medication** widget.



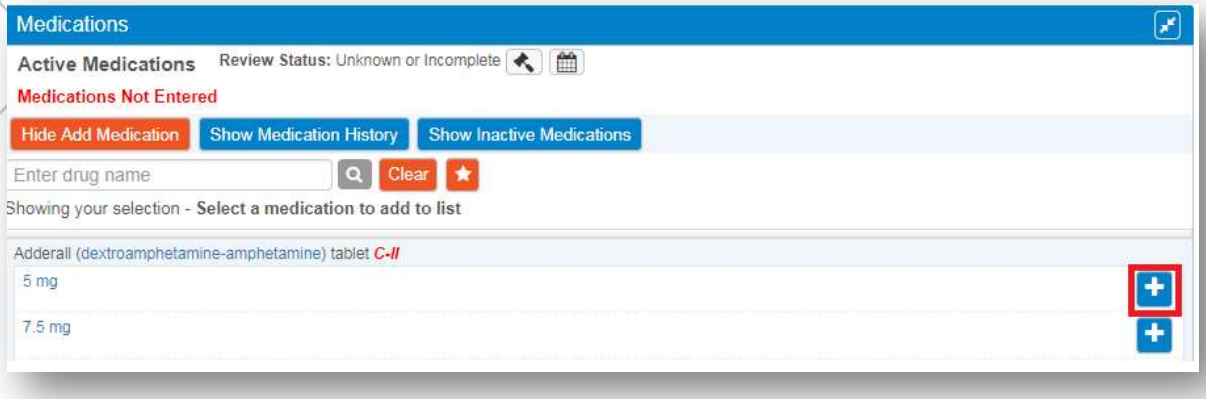
4. From here you can input a number of fields including **Patient Directions**, **Duration**, **Quantity**, **Refills**, **Start Date**, **Last Written Date**, **Stop Date**, **Med Hx Source**, and **Internal Comments** pertaining to the medication.

   These fields are not required when adding a medication, so if you wish to quickly add in the medication, click the **Add** button at the bottom of the screen.



Quick Add an Active Medication

1. Once the **Quick Add** feature is enabled within the Location settings by an administrator, users will be able to add medications to the active medication list without entering medication details.
2. To **Quick Add** a medication to the Active Medication list, click on the **Add Medication Button** and search for the desired medication.
3. Once the results display, click on the **+** icon on the right hand side of the desired medication.

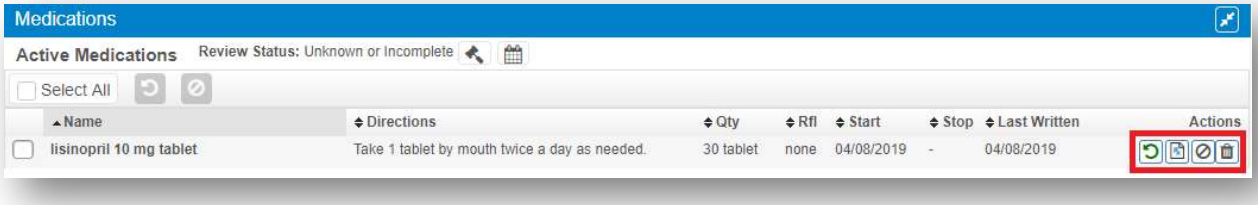


4. This will quickly add the medication to the **Active Medications** list without any details and bypass the sig screen.

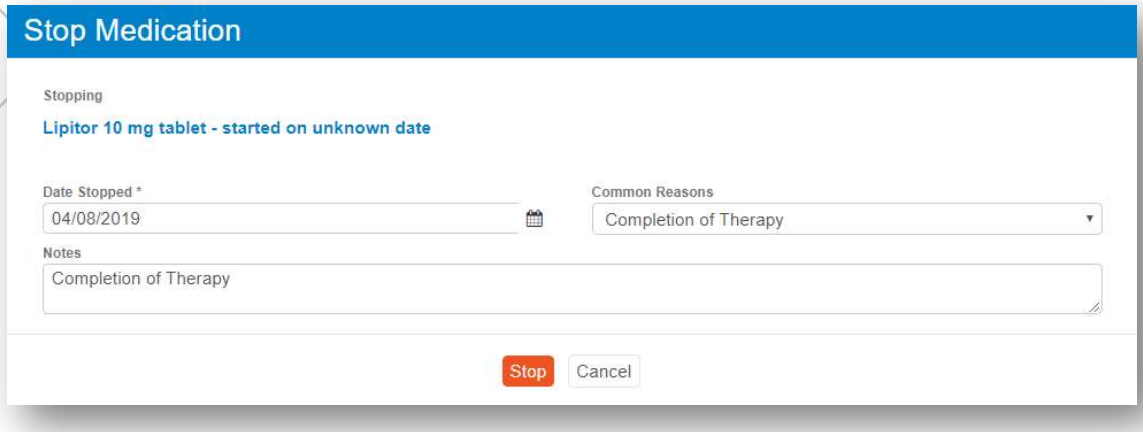
Stop/Start a Medication

Users can take a number of different actions on a medication by choosing the appropriate action from within the **Active Medications** list. These include **Renew**, **Prescribe**, **Stop**, and **Delete**.

1. To stop a medication, click the red **Stop** icon.

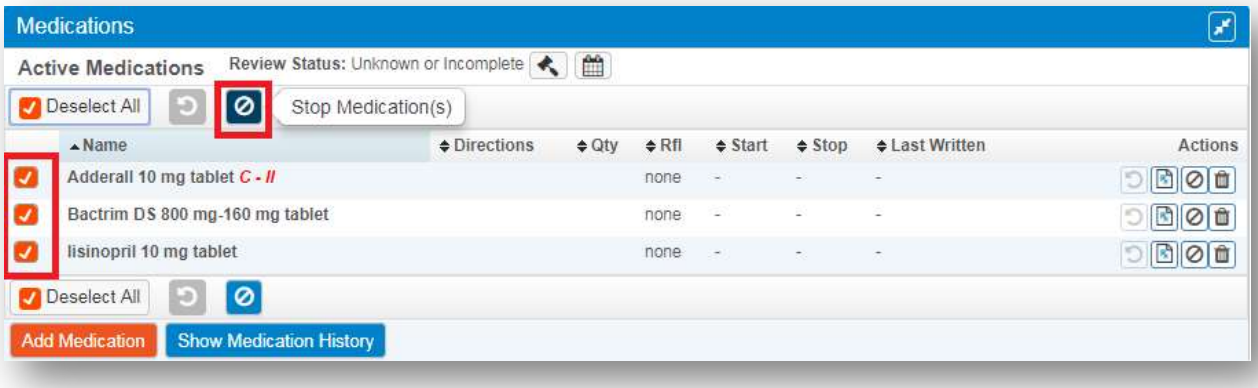


2. The **Date Stopped** will be defaulted to the current date and **Common Reasons** to 'Completion of Therapy'. If you wish to change these, select a new date by clicking on the calendar icon or selecting a new reason from the drop-down box.
3. Once complete, click the **Stop** button. This will stop the medication, taking it off the **Active Medications** list and making it inactive.

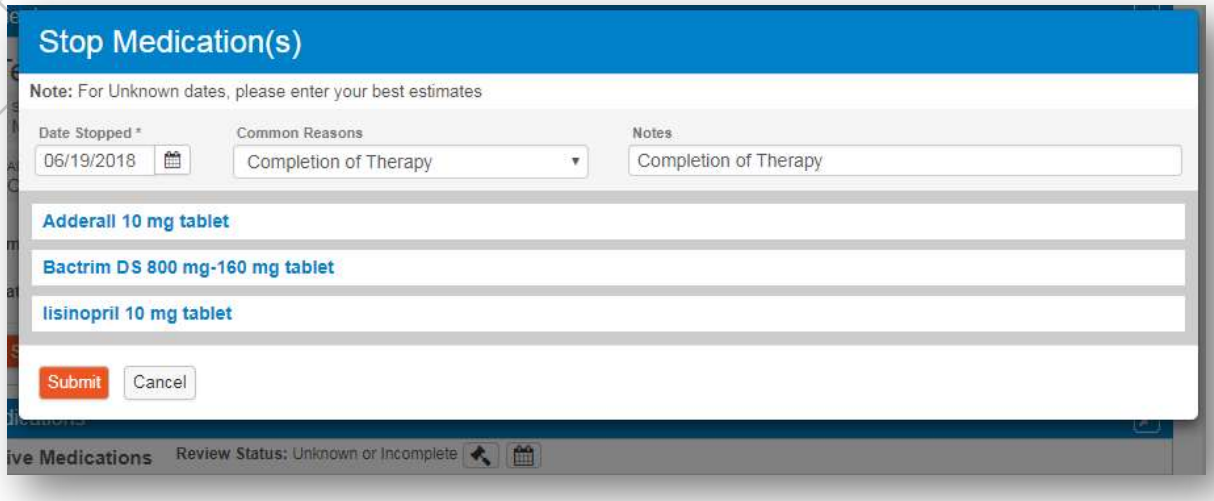


Stopping Multiple Medications

1. To stop multiple active medications, select the medications to be stopped using the checkboxes.



2. Click on the **Stop Medication(s)** button
3. Rcopia will display a list of the medications to be stopped. Users can take a number of actions including: Change the **Date Stopped**, select a **common reason**, and add custom notes. Additionally, any active medications that have previously been prescribed can be cancelled by clicking **Cancel Last Prescription for All**. Click the **Submit** button to confirm changes.



View Inactive Medications

Any medications that have been prescribed or added within Rcopia, and stopped for whatever reason, can be seen within the **Medications** widget.

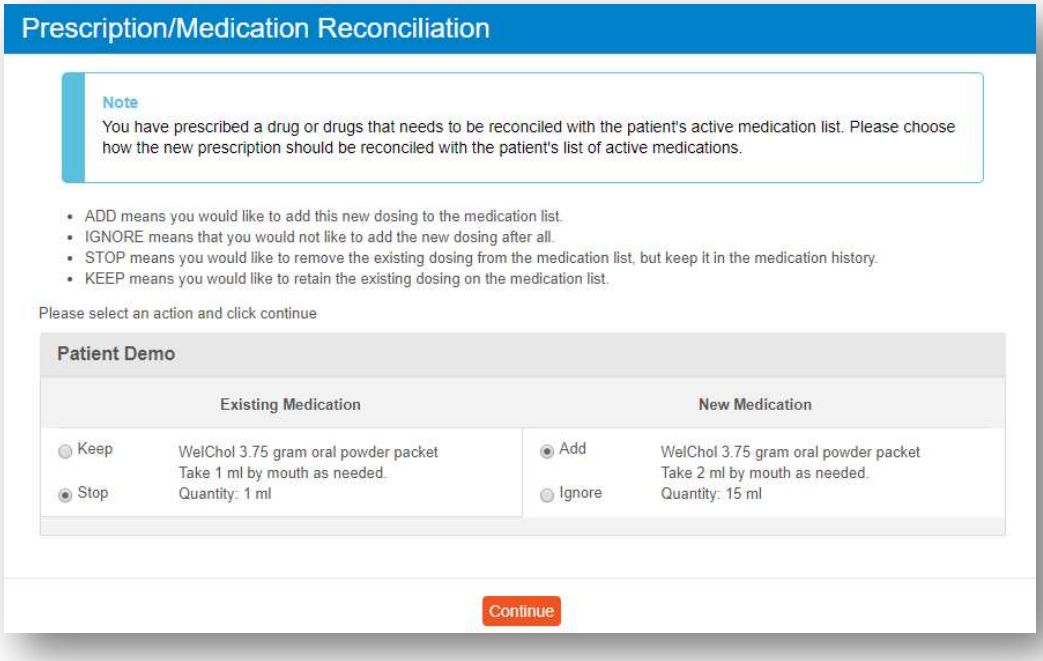
1. Click on the **Show Inactive Medications** button.

2. Rcopia will display a list of all **Inactive Medications** within the patient's record. You can take a number of actions which include **Renew**, **Prescribe**, **Restart**, and **Delete**.

Prescription/Medication Reconciliation

When prescribing in Rcopia, a prescription will be added to the **Medications** list of the patient profile as a prescription is sent to the pharmacy.

However, if the same medication is already listed in the active list, users will encounter the **Prescription/Medication Reconciliation** screen. This allows users to decide what should happen to the already listed version of the medication as well as the newer medication that was prescribed.



The available action options are:

- **Add**: Apply the new dosing to the medication list.
- **Ignore**: Do not apply the new dosing to the medication list.
- **Stop**: Remove existing dosing from medication list, but keep in medication history.
- **Keep**: Retain the existing dosing on the medication list.

PDMP (Prescription Drug Monitoring Program)

Rcopia 4 allows for PDMP checking to ensure that providers are able to prevent prescription drug abuse and adhere to any state requirements for PDMP checking.

Please Note: Some states do not allow for third party PDMP checking and require providers to check through their designated platforms. To check if we are able to support PDMP in your state and to see if your state currently mandates PDMP checking, please visit our website at www.drfirst.com/resources/pdmp-query-mandate-map.

Account Setup for PDMP Checking

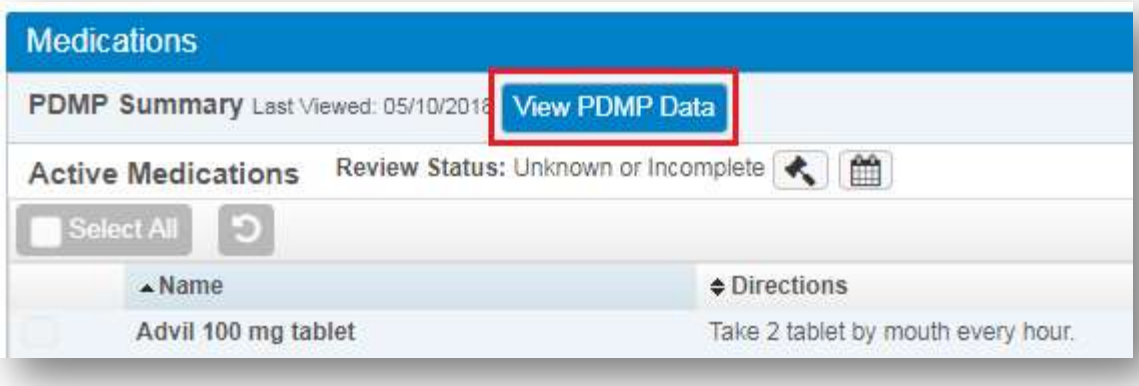
To find out more information about PDMP checking and to have your account set up, please contact your Account Manager for further information.

You will need to already be set up with your state to check PDMP and may need to provide additional information for setup.

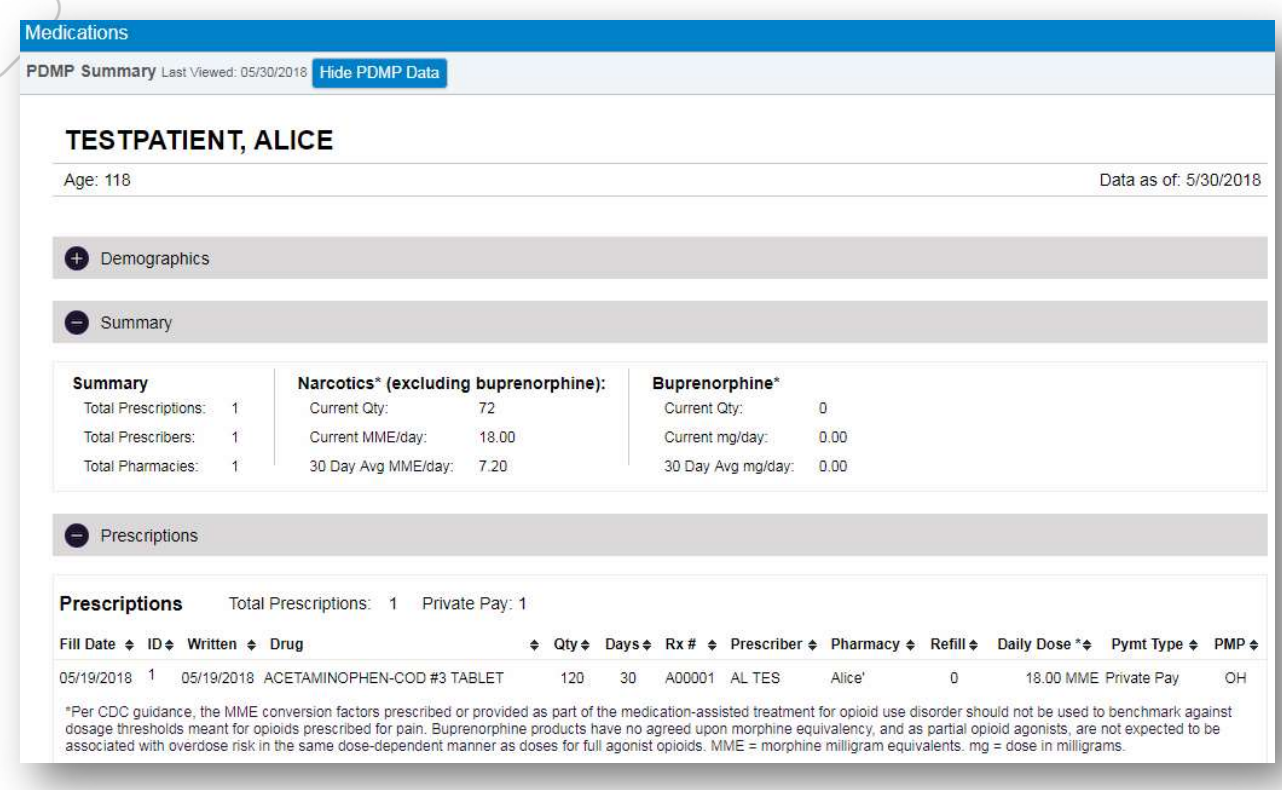
Accessing and Viewing PDMP Data

The option to view the PDMP report will only display within the Medications widget if a practice is enabled for PDMP. In order to view the PDMP Summary, follow the steps below.

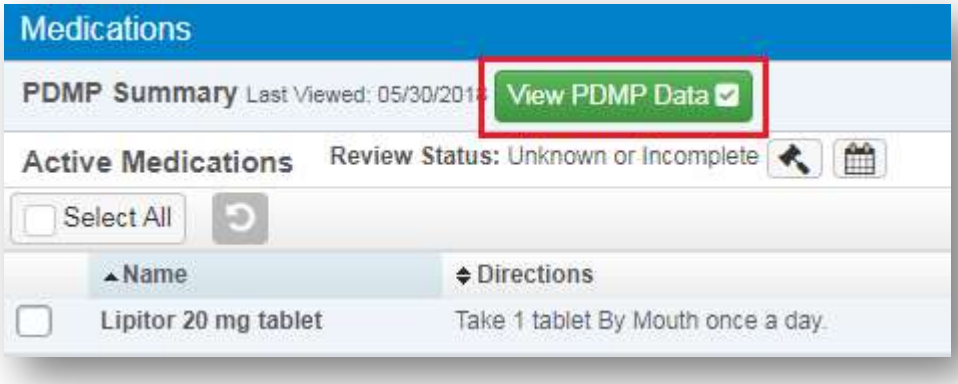
1. Click the **View PDMP Data** button.



2. The PDMP Summary Report will display as shown below.



3. When the report is opened, the event is logged on the backend. This accounts for the provider checking the PDMP based on state regulations. Once closed, the button color will change to green and a last viewed date will display.



Create a New Prescription

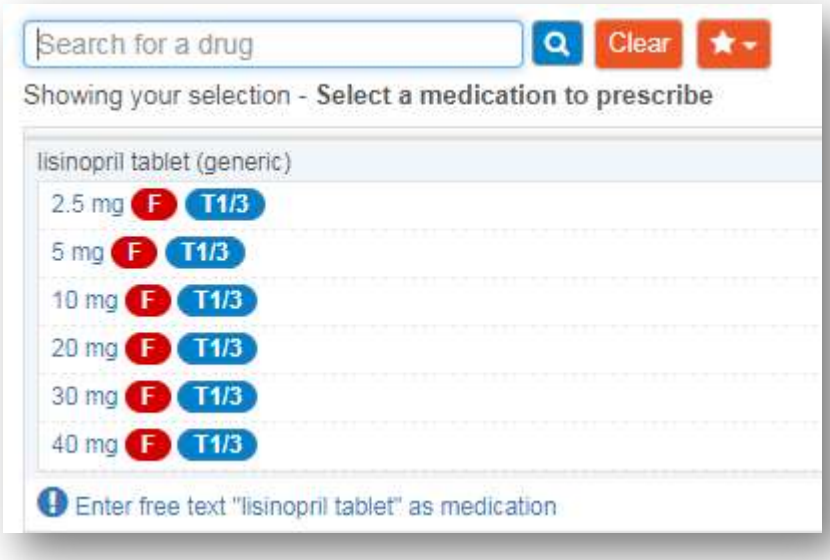
There are a number of ways to create a prescription within Rcopia 4. Make sure you have the appropriate patient selected before creating a new prescription.

Manual Prescription

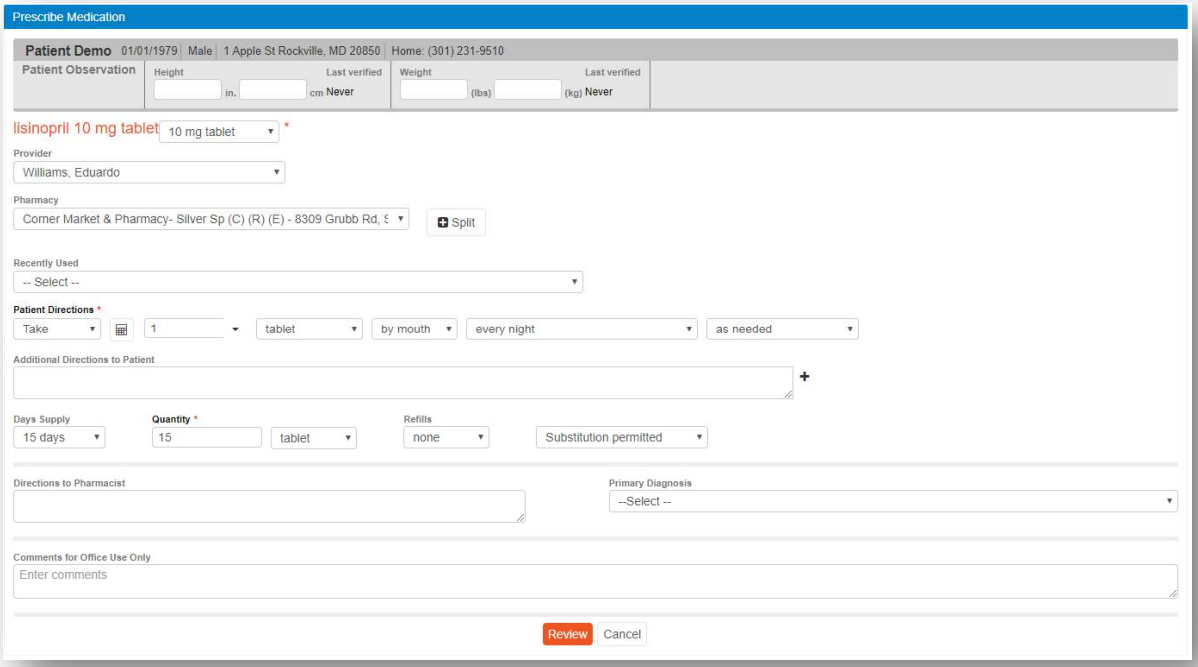
In order to manually create a prescription, follow the steps outlined below.

1. To begin, click on the **Create New Prescription** button within the context bar.

2. Enter the first several letters of the drug you wish to prescribe in the search field. The results will begin to auto-populate within a drop-down box. Less is more when searching for a medication.
3. Either select from the list or run the search to display full results.
4. Next, click on the desired strength to launch the **Prescribe Medication** widget.



5. Within the **Prescribe Medication** widget, fill in the required fields as noted by the red asterisks.



6. Below is a description of all fields within the widget.
    a. **Patient Observation (Height and Weight)** shows the patient's height and weight if they were recently observed. These values may be entered or edited on the screen.
    b. Verify that the **Provider** and **Pharmacy** fields are correct or use the corresponding drop-down menus to edit.
    c. Verify that the **Drug** you have chosen is correct. Use the drop-down menu to change the drug strength.
    d. Select the appropriate values from the drop-down menus for the **Sig** details. The last field (Other) is optional.
    e. Choose a **Duration**, if desired. This will automatically populate the quantity field. If a duration is chosen, the medication will be automatically removed from the patient's Active Medications list once the duration has passed.
    f. Enter the Patient Weight and select a desired dosage and frequency to use the **Dose Calculator**, if desired.

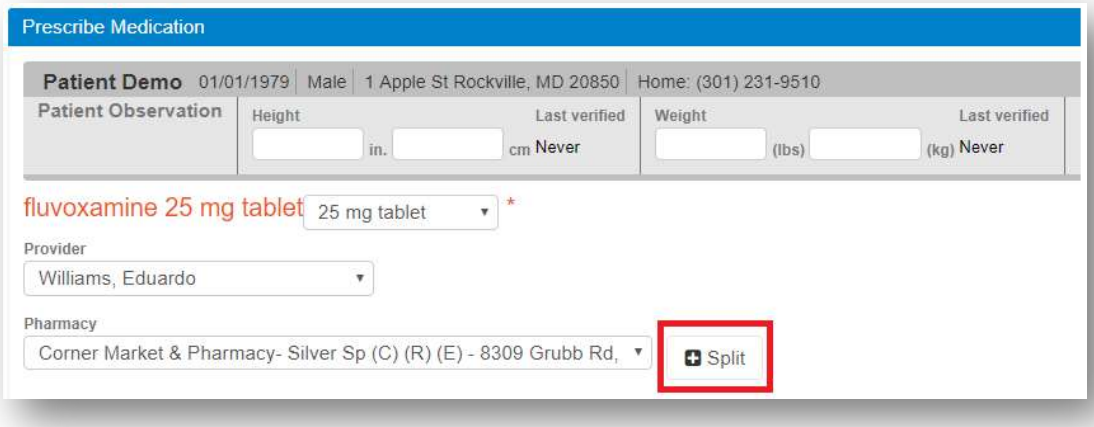
g. Choose a numerical **Quantity** and number of prescription **Refills**. **Refills** are defaulted to 'none'.
h. Enter a **Primary Dx** (Diagnosis) and/or **Secondary Dx**, if desired. These fields will only appear if the patient has Problem(s) listed in their Problem History.
i. Enter **Directions to Pharmacist**, if desired. Directions are defaulted to 'Substitution permitted.'
j. Enter **Directions to Patient**, if desired. There is no character limit so you can type in as much text as needed to complete the tapered sig. (Note: If you exceed 140 characters, the prescription will be automatically sent by fax and will not be transmitted electronically.)
k. Enter **Comments** (for office use only), if desired.

7. Click the **Review** button to proceed.

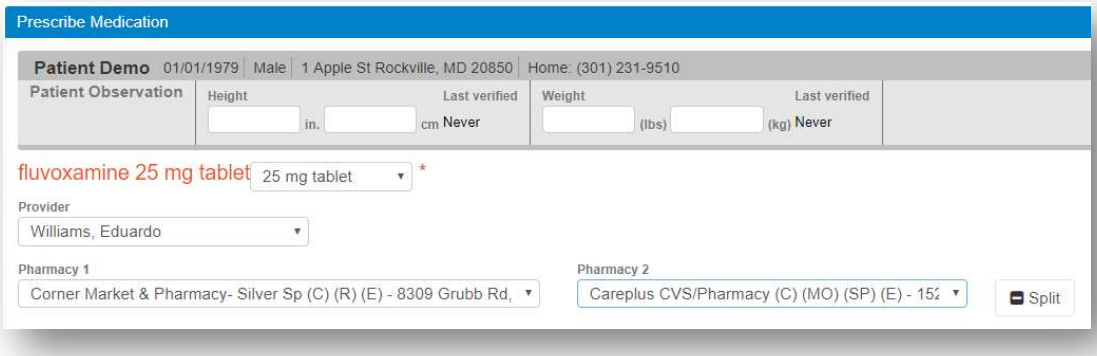
Split a Prescription

When prescribing, you have the ability to split a prescription between two pharmacies. This will send a prescription for the same medication, with the same sig, to two different pharmacies.

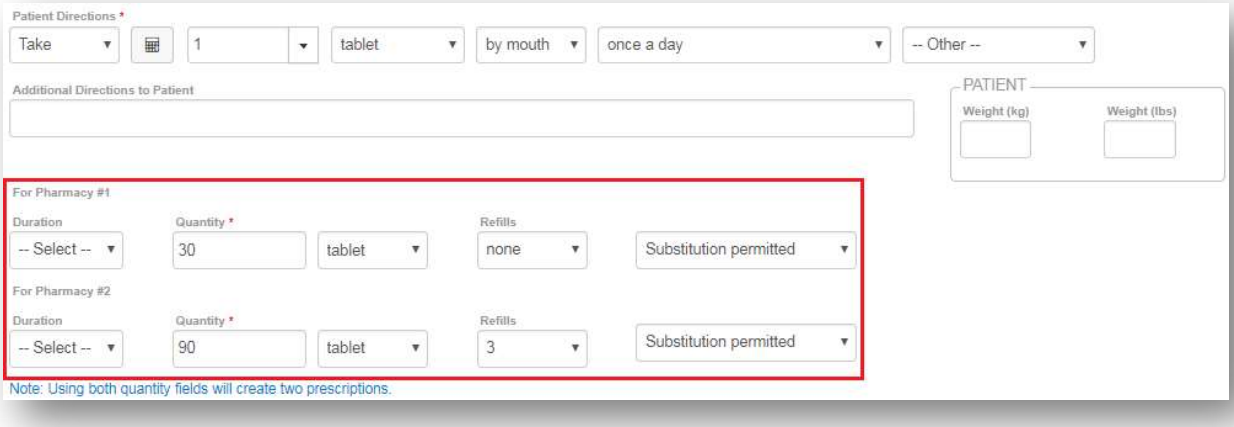
1. To split, click the **+ Split** button to the right of the default pharmacy.



2. An additional section will appear to the right, allowing you to choose a secondary pharmacy.

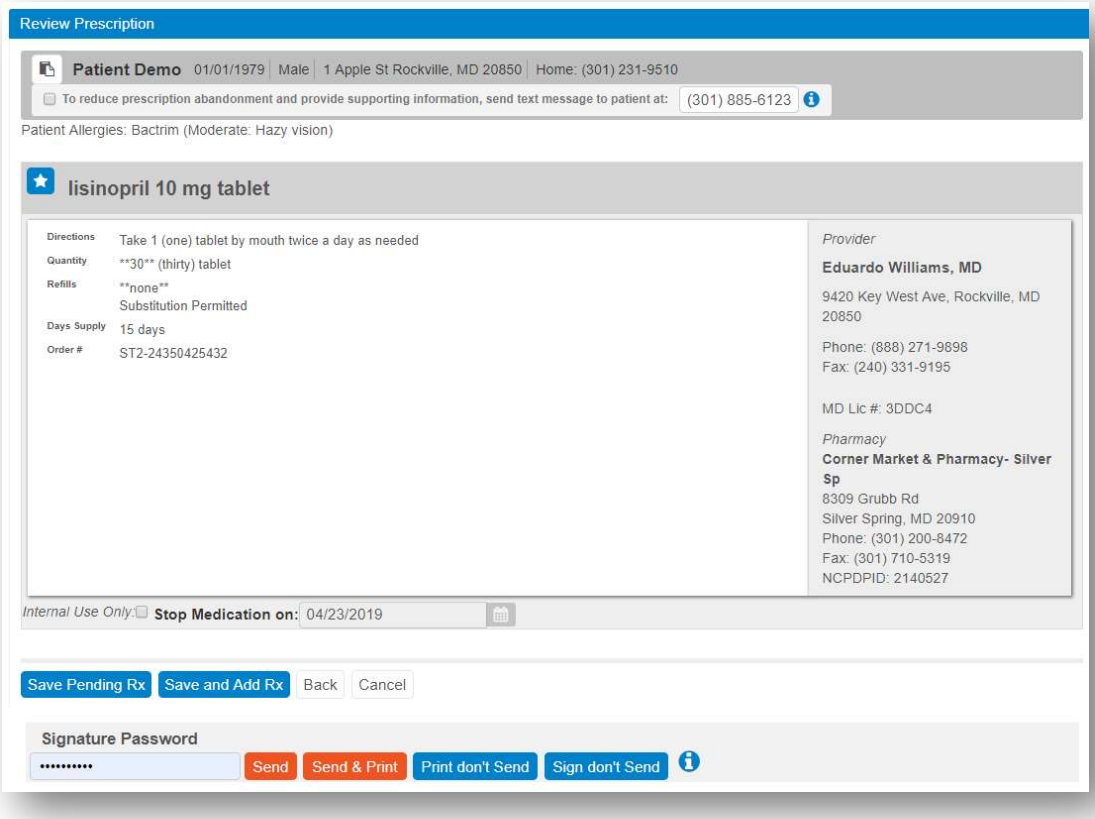


3. In order to send two prescriptions, you must fill out all at least **Quantity** for both Pharmacy #1 and Pharmacy #2. You may also set a specific **Duration** and number of **Refills**.



Review Prescription

After entering prescription details, you will be brought the **Review Prescription** screen. It is very important to review the prescription to ensure you have created the highest quality prescription for your patient.



1. Click one of the action buttons immediately below the prescription.
   - **Save Pending Rx**: adds the prescription to the Prescription Management section on the Patient Info Screen for review and signoff.
   - **Save and Add Rx**: creates a pending prescription and navigates the user back to medication search widget.
   - **Back**: allows you to edit the Sig details in the Prescribe Medication widget.
   - **Cancel**: cancels the prescription.

2. To take immediate action on the prescription, type in your **signature password** (if you are a provider), and click one of the four buttons on the bottom of the screen.

3. If you would like your patient to receive a copy of the prescription, make sure their mobile phone number is entered at the very bottom of the **Review** screen.
4. They will receive a text message providing access to their personal medication record where they can see any recent prescriptions, updates their active medications, view coupons and drug pricing information, as well as securely store health data.

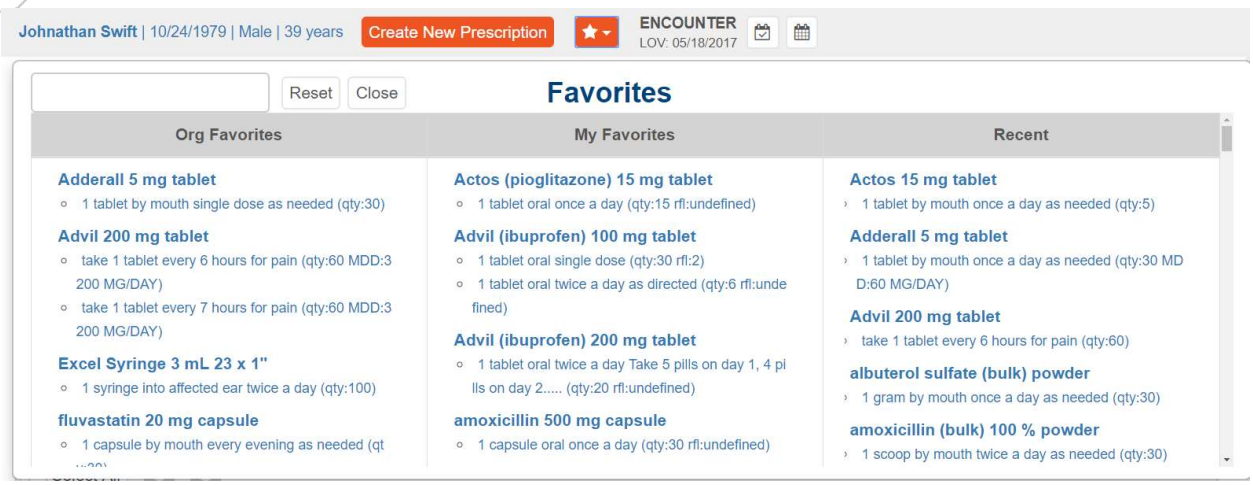
Prescribing Favorite Prescriptions

Users will be able to choose from their Practice list (Org Favorites), Location list (if applicable), Individual Favorite list (My Favorites) or Recent. Favorites are now searchable by typing into the search box.

Recently used favorites will be displayed in the right column. This list will display the 10 most recent prescriptions from the last 10 days. The display of these lists will depend on the practice location's settings.

1. Click the **Favorites** drop-down located within the context bar.

2. Next, select the desired favorite prescription to use from the drop-down list. This will create a pending prescription.



3. Once a favorite is selected, a pending prescription will be created and can be signed within the **Prescription Management** widget.

Creating Favorites

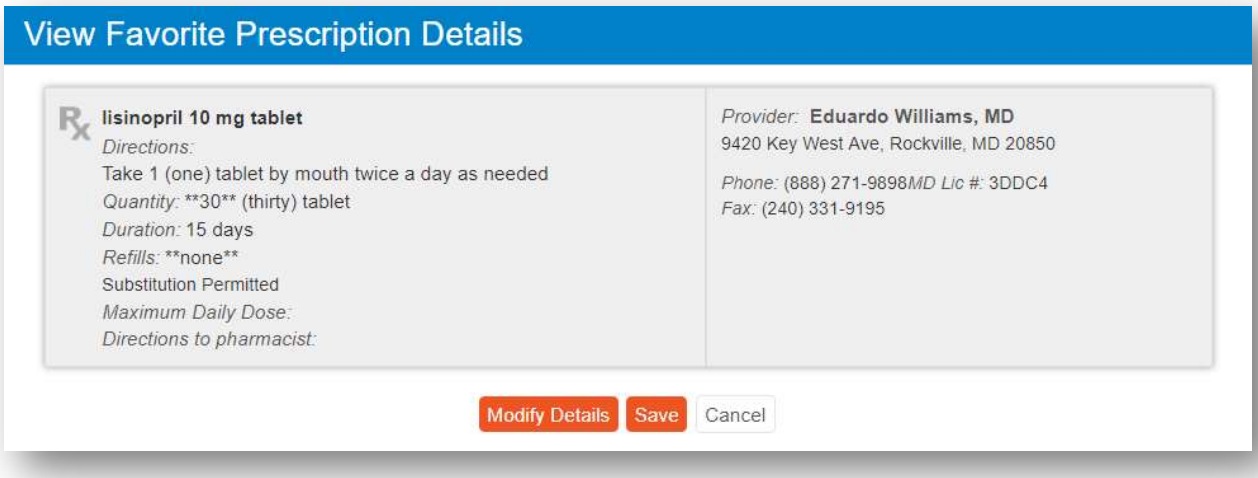
There are multiple ways to add a new favorite prescription.

1. Within the **Prescription Management** widget, click the star icon.
2. On the review prescription screen, click the star icon.
3. Click on the menu icon at the top left of the screen and choose **Utilities**. Then, select **Favorites**.

To create a favorite within the **Prescription Management** section, follow the steps below.

1. Click the star icon on the far right-hand side. A star icon that is already yellow, indicates that a prescription is already a favorite.

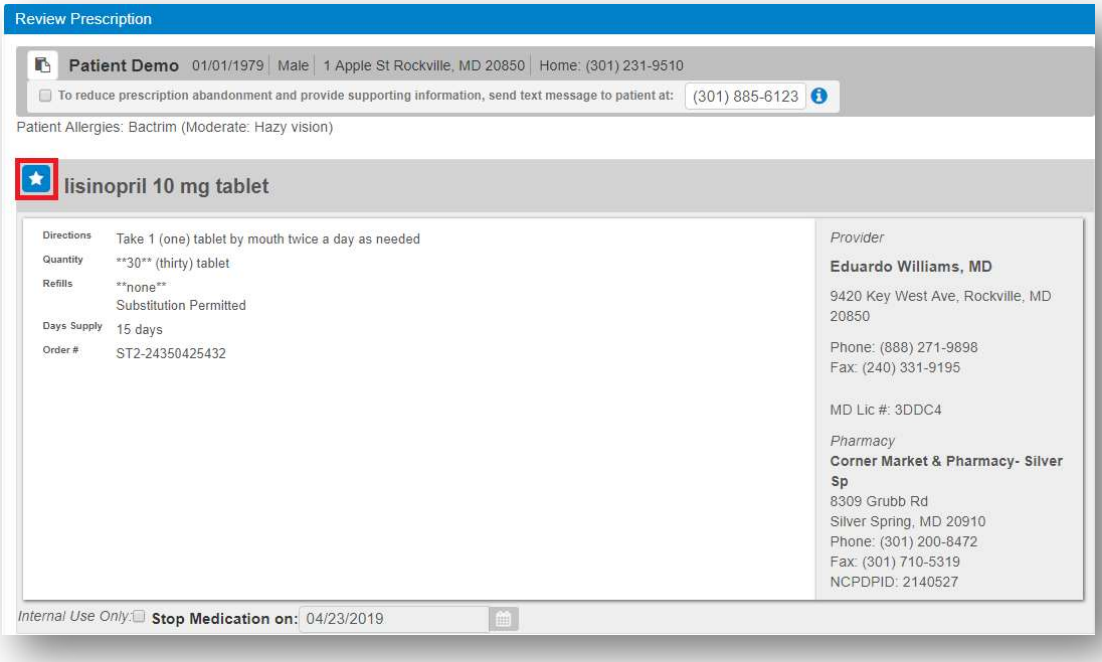
2. You will then be taken to the **View Favorite Prescription Details** widget, and you will see an overview of the favorite prescription. You can edit the details or save the favorite as is.



3. Use the **Modify Details** button to make modifications before saving if needed.
4. When ready to save, click on the **Save** button. This will add the favorite to your personal favorite list.

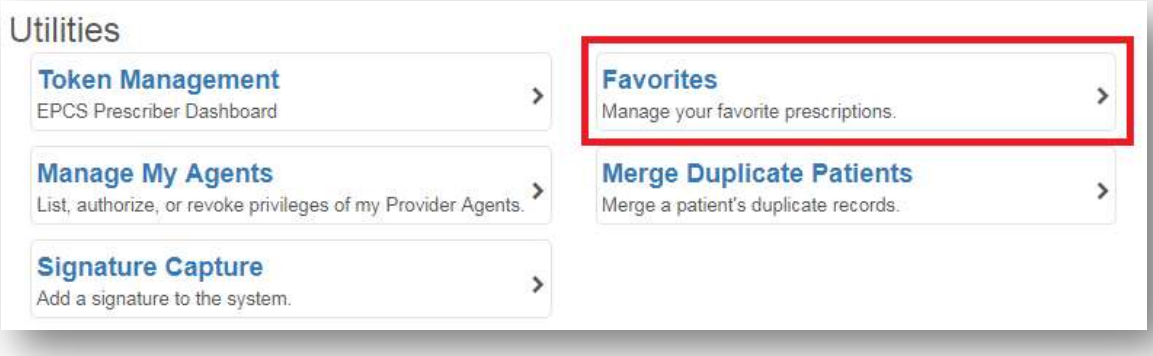
To create a favorite from the **Review Prescription** pop-up, follow the steps below.

1. Click the star icon, and follow the same steps outlined above for adding favorites within the **Prescription Management** section.



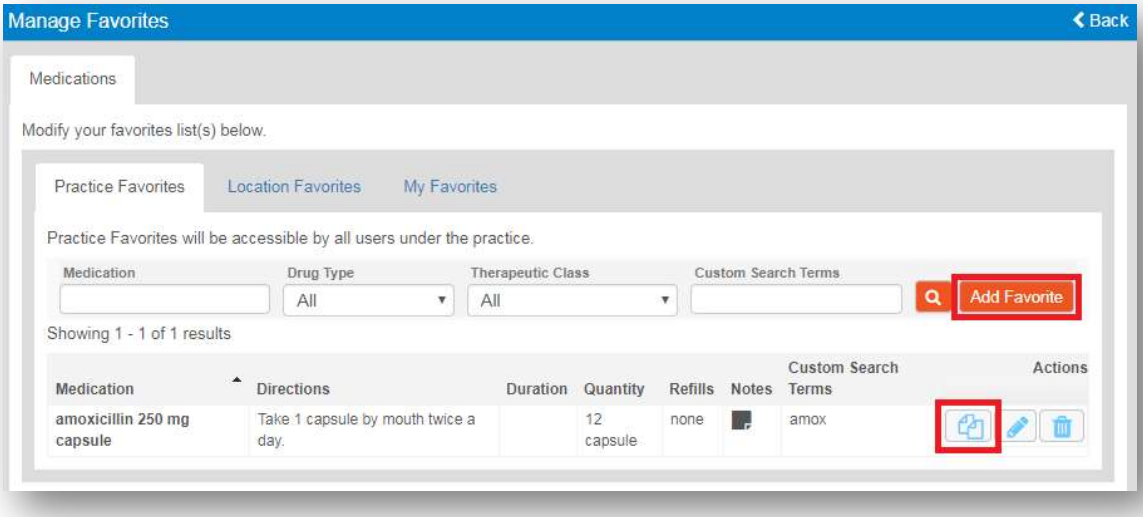
To create a favorite from the **Utilities** section, follow the steps below.

1. Click on **Manage My Favorite Prescriptions** link within the left menu.

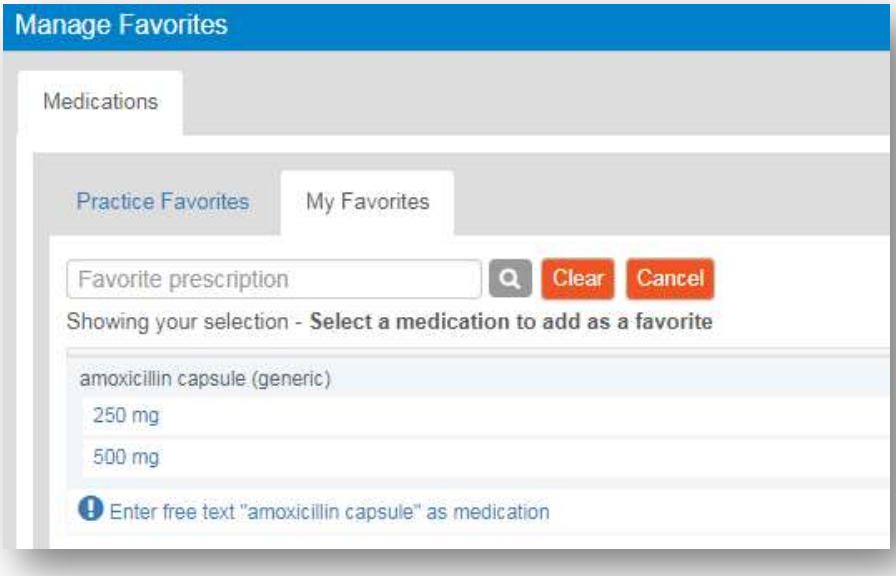


2. After clicking on **Favorites**, you will see a list of currently favored medications. You are able to add new favorites by clicking on the duplicate icon to create a slightly different favorite from an already existing one or by clicking on the **Add Favorite** button.

a. Depending on location settings and account permissions, you will be able to manage the **Practice Favorites** and **Location Favorites** lists. All users can manage their own favorites through the **My Favorites** list.



3. If you click on **Add Favorite** button, you can search for the medication you wish to favor and select it by clicking on the appropriate strength.

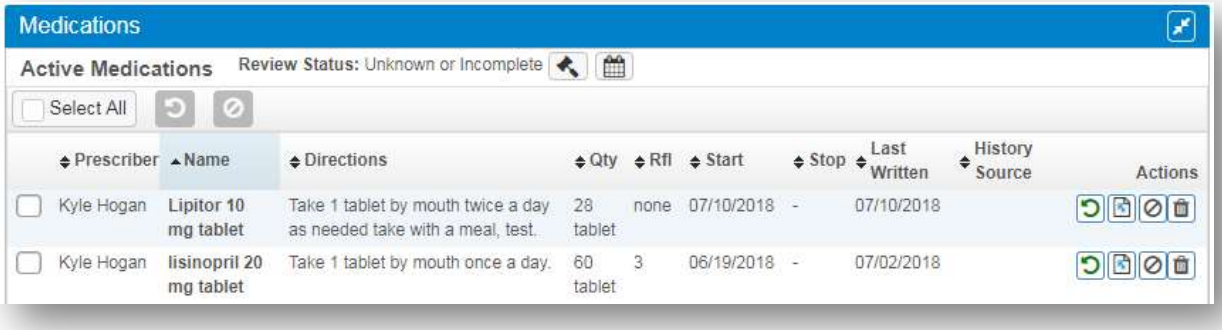


4. When finished entering in or modifying the details for the new favorite, click the **Save** button.

5. Once a favorite is created, administrators can take a few different actions. These include:
    a. **Duplicate**: Used to quickly duplicate the same medication favorite. Users can change the strength or details.
    b. **Edit**: Used to edit the medication favorite.
    c. **Delete**: Used to delete the medication favorite.

Prescribing Active Medications

This method can only be used if a patient has an active medication. Within the **Medications** widget, find the appropriate active medication and refer to the action icons on the far right-hand side.



1. **Renew from Medication**: will allow you to create a prescription that has been previously inputted into the Rcopia 4 system. Once you click renew, the prescription will appear in your Prescription Management section. You will NOT be taken to the Prescribe Medication widget.
2. **Prescribe from Medication**: will allow you to change the details for the prescription (sig, duration, quantity, refills, pharmacy, etc) and then prescribe.
3. **Stop**: will allow you to stop a medication. You will be prompted to enter a reason for stopping this medication (optional, will be displayed in the patient's inactive medications).
4. **Delete**: will allow you to delete a medication. You will be prompted to confirm deleting the medication before the medication is deleted. You would only want to use this option if the medication was added in error onto the patient's medication list.

Compound Drug Prescriptions

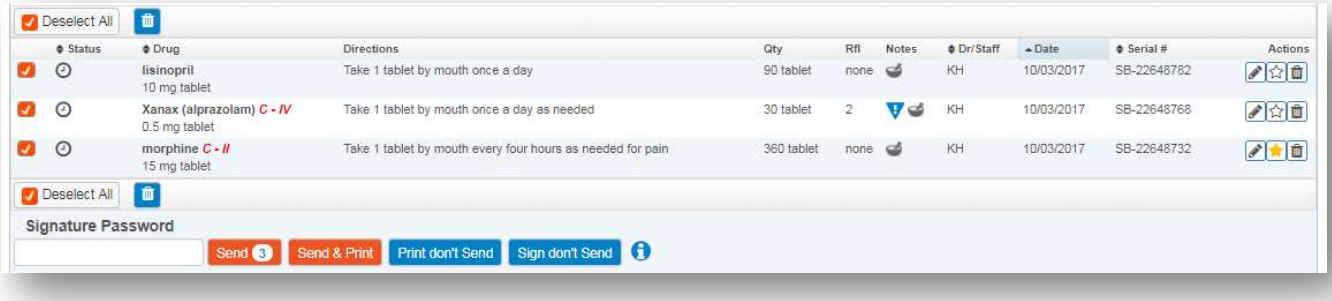
To create a compound prescription, begin by selecting one of the drugs within the compound as the base. Then, within the “Directions to Pharmacist” field, fill in details for any of the additional drugs that are being compounded.

Titrations and Tapered Prescriptions

For tapered prescriptions or titrations, you will begin by selecting the drug you intend to prescribe. To complete the directions to patient, first utilize the patient directions drop down boxes if at all possible, then use the “Additional Directions to Patient” field to fill in any details for tapers or titrations.

Sending a Prescription

1. Scroll down to the **Prescription Management** section on the **Patient Info** screen.
2. Select the desired prescription(s) you want to process by checking or unchecking the check boxes on the far left.



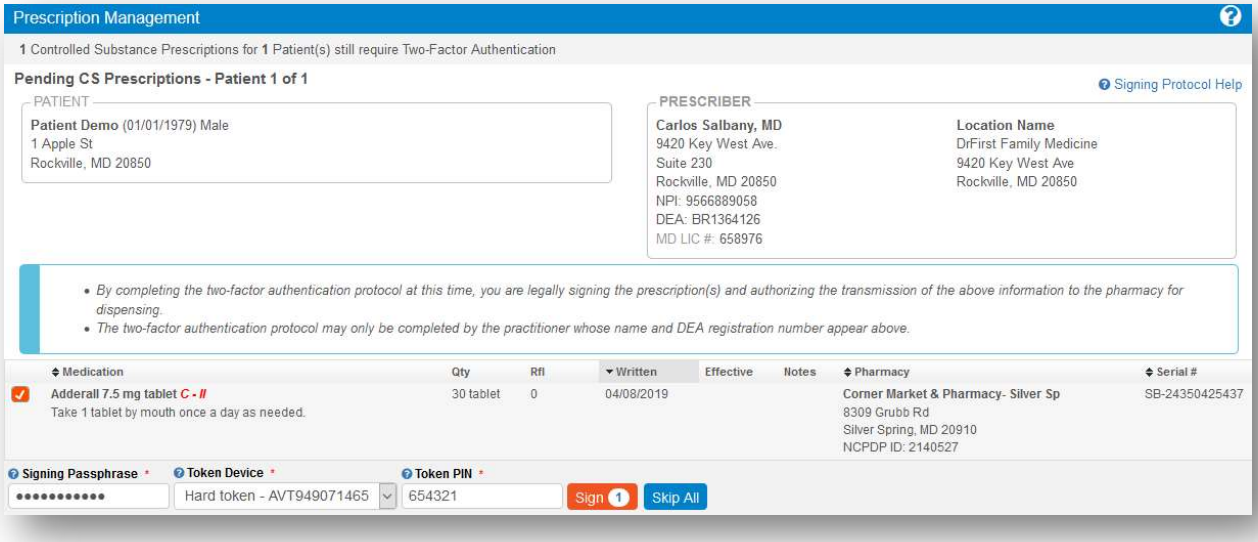
3. If you are a provider, enter your **Signature Password**.
4. To complete your prescription, select one of the options provided:
   - **Send**: transmits the prescription to the pharmacy electronically.
   - **Send & Print**: transmits the prescription to the pharmacy electronically and prints out a watermarked (non-legal) copy of the prescription for your records.
   - **Print don't Send**: prints the prescription without sending it to the pharmacy. This option may be used if the patient is unsure which pharmacy he or she would like to use. This is required for controlled substance prescriptions in some states.
   - **Sign don't Send**: signs the medication and adds the medication to the patient's active medication list, but does not send a prescription to the pharmacy. This is useful if the patient was given a sample.

Sending a Controlled Substance Prescription

In order to prescribe controlled substances electronically, a provider must have successfully completed the EPCS onboarding process and be activated by an administrator through Logical Access Control (LAC). If you are an active EPCS prescriber, you will be able to sign and send controlled substance prescriptions electronically within Rcopia 4.

From the Review Screen

1. When creating a prescription manually, users have the ability to sign off on controlled substances within the **Review Screen**.
    - Once you enter your signature password, the Two Factor Authentication (TFA) section will display.



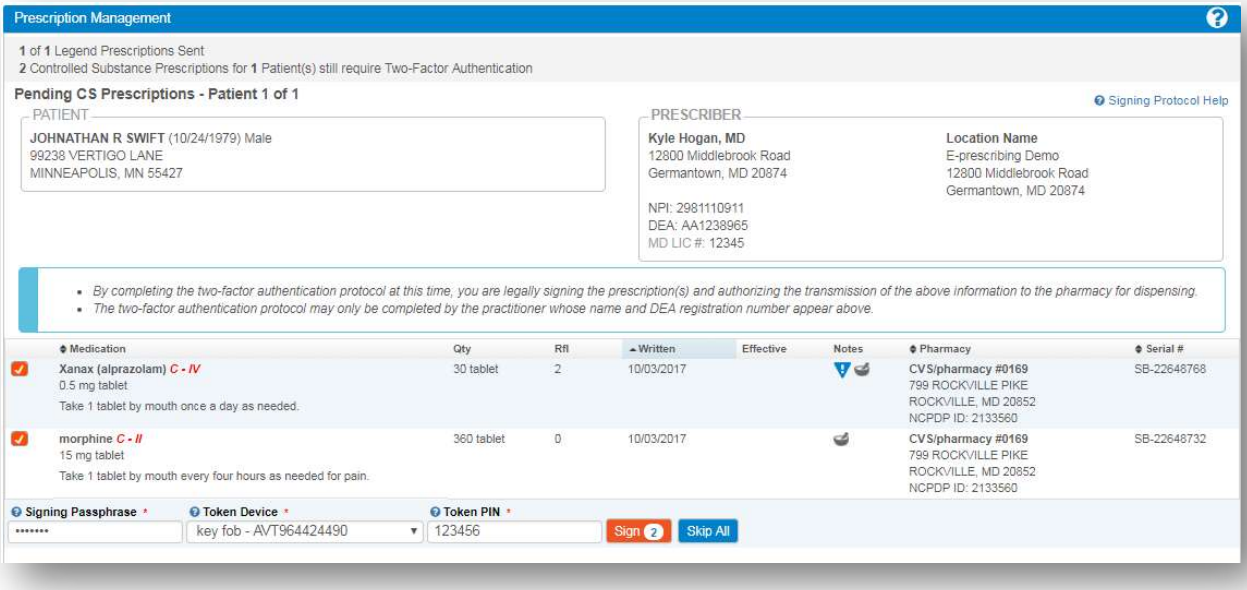
    - Check any controlled substances you wish to process. Then, enter your signing passphrase, choose your EPCS token, and enter the OTP/security code.
    - When ready, click the **Sign and Send** button.

From Prescription Management/Prescription Report

Users have the ability to sign off on controlled substance prescriptions from with Prescription Report and Prescription Management.

1. Once you have identified which prescriptions you wish to send, enter your signature password and click the **Send** button. There will be a badge notification with the number of prescriptions you are transmitting.

2. At the top of the screen, you will see how many legend prescriptions were sent and you can see how many pending controlled substance prescriptions are to be completed. You will need to check the box next to the medication name and enter your two-factor authentication to complete the prescription.
    a. You can also choose **Skip Patient** or **Skip All** to move forward and process these at a later time.



Prescription Report

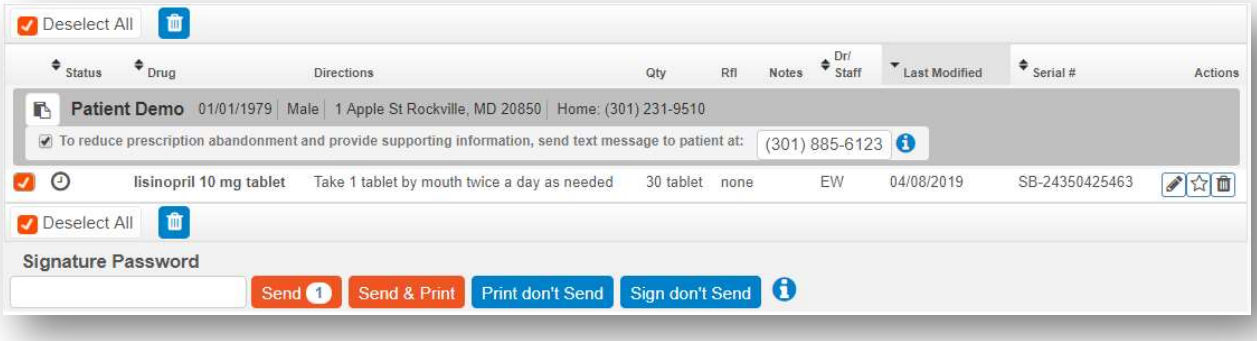
The **Prescription Report** allows users to manage all prescription activity within one convenient location. While in Single Patient mode, the Prescription Report will be accessed via a launch button in your EHR. Upon launching the Prescription Report, use the steps below to create your report:

1. Select the appropriate provider or select **All Providers** from the drop-down list.
2. Select either **All Patients** or the **Current (patient)**.
3. Select the appropriate Status:
    a. **All**: displays pending and completed prescriptions.
    b. **Pending**: displays only those prescriptions that have not had any action taken on them.
    c. **Completed**: displays all completed prescriptions (signed and sent or signed and printed).
        i. When **Completed** is selected, a date filter is displayed. Select the appropriate date range.
    d. **Undeliverable**: displays prescriptions that have not been delivered to the pharmacy.
4. Click on the **Display Report** icon to show the report on screen. All prescriptions that match the criteria will be displayed below.
5. The report contains multiple columns and will show you the Status of the prescription and sig details, allowing you also to take Action on each prescription.
    a. **Status**: shows whether or not a prescription was successfully sent to the prescription's final destination. Hover your mouse over the icon to display the meaning for each icon.
    b. **Action**: depending on the status of the prescription, different Actions will display. Hover your mouse over an icon to display an explanation for each Action.
        i. Favor: adds the prescription to your Favorites List.
        ii. Modify: allows you to modify the prescription before completing it.
        iii. Delete: allows you to delete any instance of the prescription.
        iv. Cancel: cancels the prescription and sends a notice to the pharmacy.
        v. Print: reprints a completed prescription.
        vi. Resend: resends a completed prescription.
        vii. Renew: renews a completed prescription.
6. Select the prescriptions to complete by checking the box to the left of the desired prescription. Pending prescriptions can be completed from the Prescription Report.

7. Enter your **Signature Password** at the bottom.
8. Click one of the action buttons, listed below, depending on healthcare provider.

Provider Options

- **Send**: transmits prescription(s) to the pharmacy.
- **Send & Print**: transmits prescription(s) to the pharmacy and prints the prescriptions to the local office printer.
- **Print don't Send**: sends the prescriptions to the local office printer, but does not send it to pharmacy.
- **Sign don't Send**: adds medication(s) to the patient's active medication list but does not send to pharmacy (often used when giving samples).



All options require a valid **Signature Password**.

Provider Agent Options

Provider Agent options are identical to the Provider options above with the exception of:

- **Send, signature to follow**: button will display instead of the Send button. This sends the prescription to the pharmacy electronically and also to the Prescriber's pending prescription queue to be acknowledged.
- **Send & Print**: transmits prescription(s) to the pharmacy and prints the prescriptions to the local office printer.
- **Print don't Send**: sends the prescriptions to the local office printer, but does not send it to pharmacy.

Staff Options

- **Print don't send**: prints the prescription(s) to the local office printer, but does not send to the prescriber's queue.
- **Archive**: adds medication(s) to the patient's active medication list, and does not send to a prescriber.

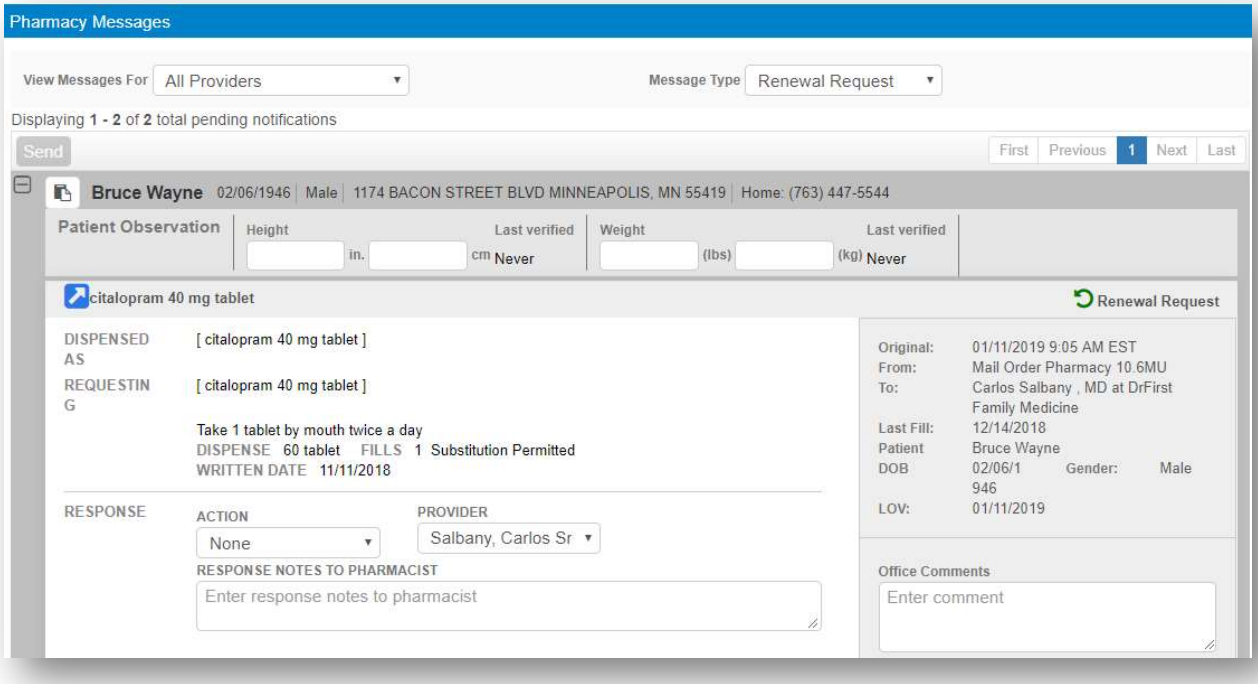
Pharmacy Messages

Pharmacy Messages are electronic requests generated by a pharmacy. These could be refill requests for the patient once his or her medication refills have been completed, change requests, or cancellation acknowledgments.

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

1. Click the **Pharmacy Message** icon within the top toolbar.

2. You have the ability to filter by provider or message type by using drop-down menus.

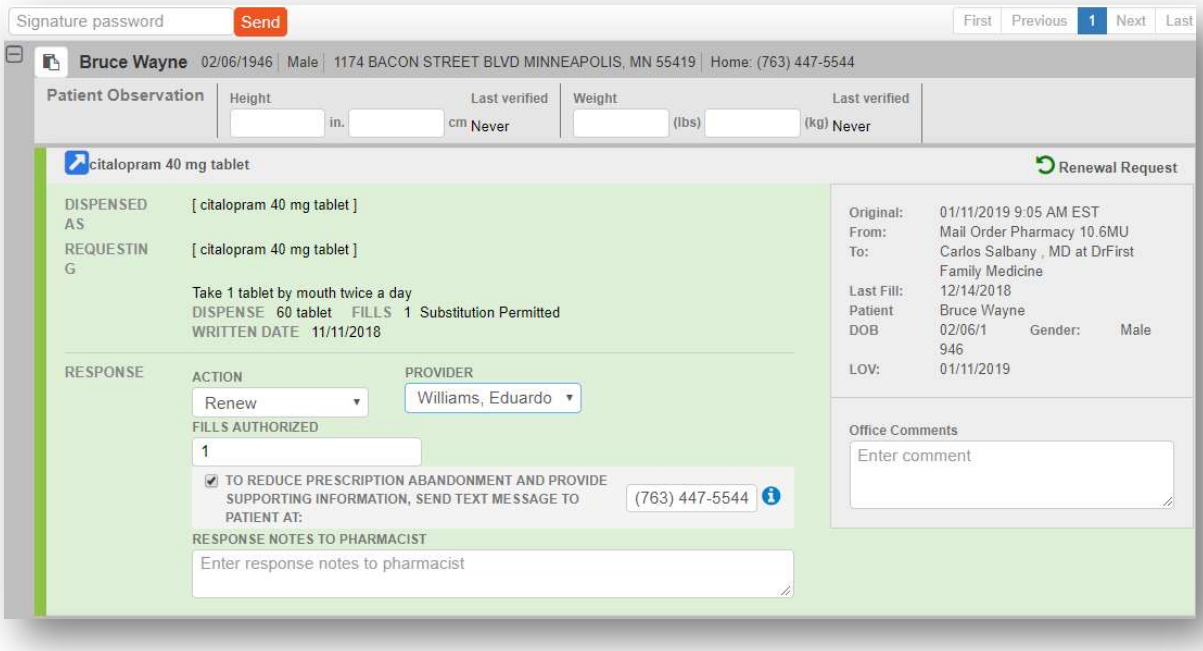


3. Select the desired action from the drop-down menu for each renewal request.
    a. **Deny**: will deny the request and send a denial message to the pharmacy.
    b. **Change:** allows you to change the prescription and/or pharmacy information. When the prescription is changed, the prescription becomes a pending prescription in the appropriate provider's prescription report. This will alert the pharmacy that the requested renewal has been denied, but a new prescription will follow.
    c. **Renew:** renews the prescription with the desired number of additional refills. When you choose the appropriate refills, you are authorizing this fill plus X

refills of the medication.

d. **Forward:** allows a staff member to forward the prescription request to another qualified prescriber in his or her practice.
e. **Remove:** should only be used if you have previously handled this request and it is a duplicate.

4. If desired, type any **Pharmacy Notes** in the **Response Notes To Pharmacist** field.
5. If desired, enter any office notes in the **Office Comments** in the box. These comments are visible only to you and your office staff.
6. After you have selected an action enter your signature password, and click the **Send** button.



Please Note: You can take action on up to 20 renewal requests at a time.

7. All requests that have an action selected will be executed and delivered to the respective pharmacy.

Medication Reports

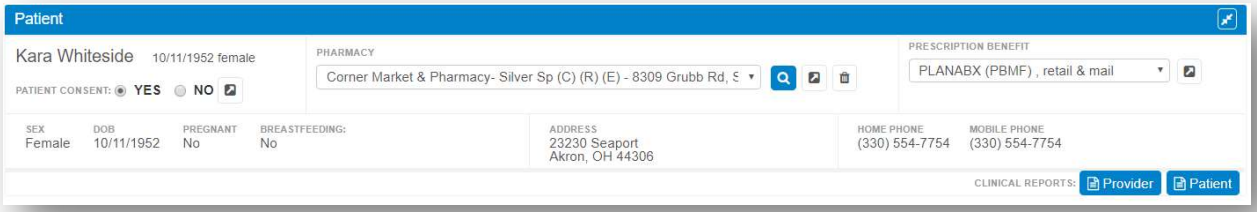
The medication reports consist of two reports that display within the **Patient Information** widget after you have selected a patient.

These two reports are the **Provider Clinical Report** and the **Patient Clinical Report**, which are available through two buttons in the **Patient** widget.

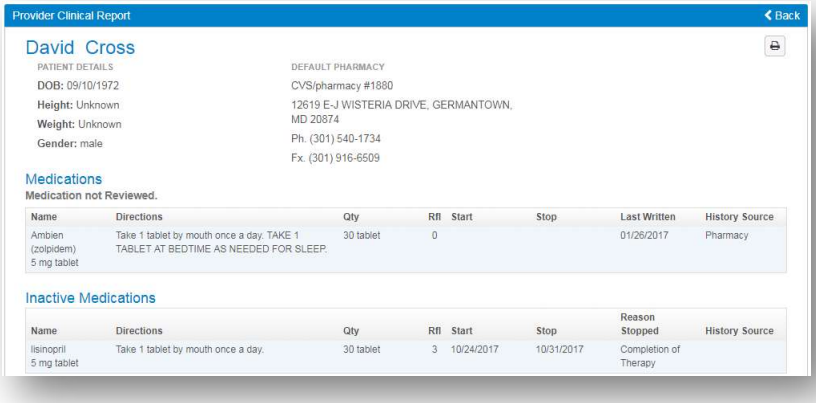
Provider Clinical Report

The **Provider Clinical Report** lists the patient's active and inactive medications. It also contains the patient's allergy, diagnoses, and pharmacy information, as well as the provider information. It is a very useful tool when transferring patient care to another provider.

1. After selecting a patient, click **Provider Clinical Report** within the **Patient Information** Section.



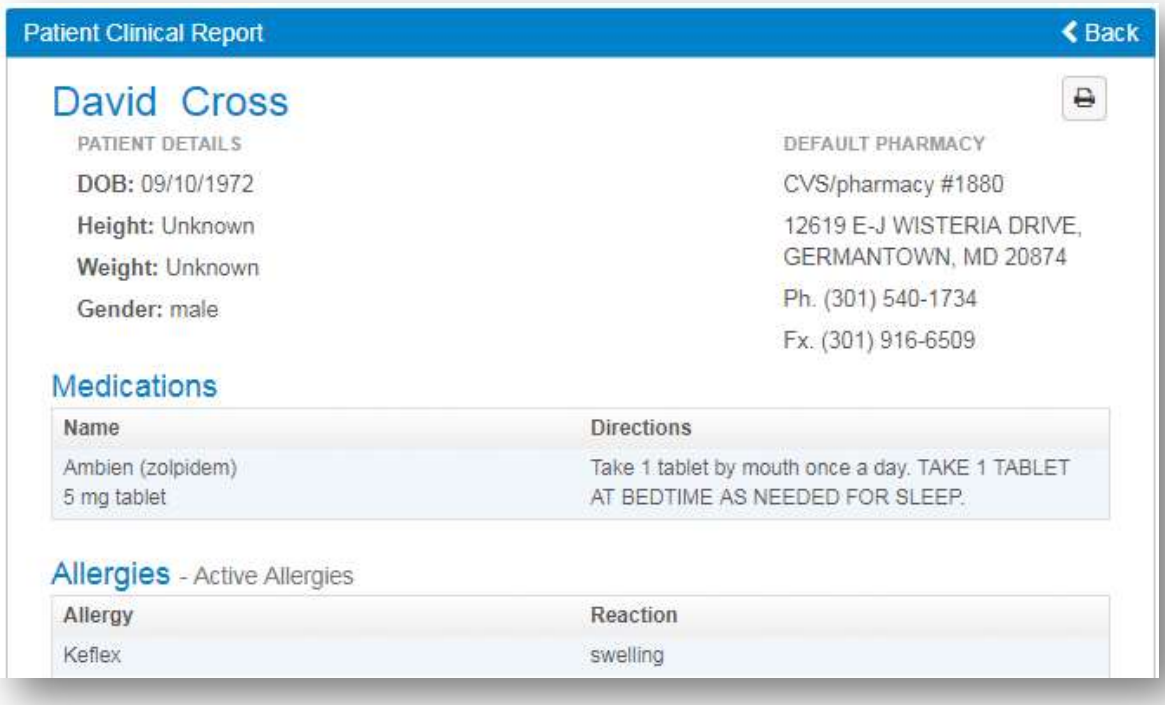
2. The **Provider Clinical Report** will then display.



3. In order to print this report, click on the **Print** icon on the top right of the report.

Patient Clinical Report

1. The **Patient Clinical Report** is a wallet-sized version of a patient's current medication, allergy and problem list. This is an ideal way for patients to keep track of the medications they are currently taking.
2. Click **Patient Clinical Report** within the Patient Information Section.
3. The **Patient Clinical Report** will then display.



4. In order to print this report, click on the **Print** icon on the top right of the report.

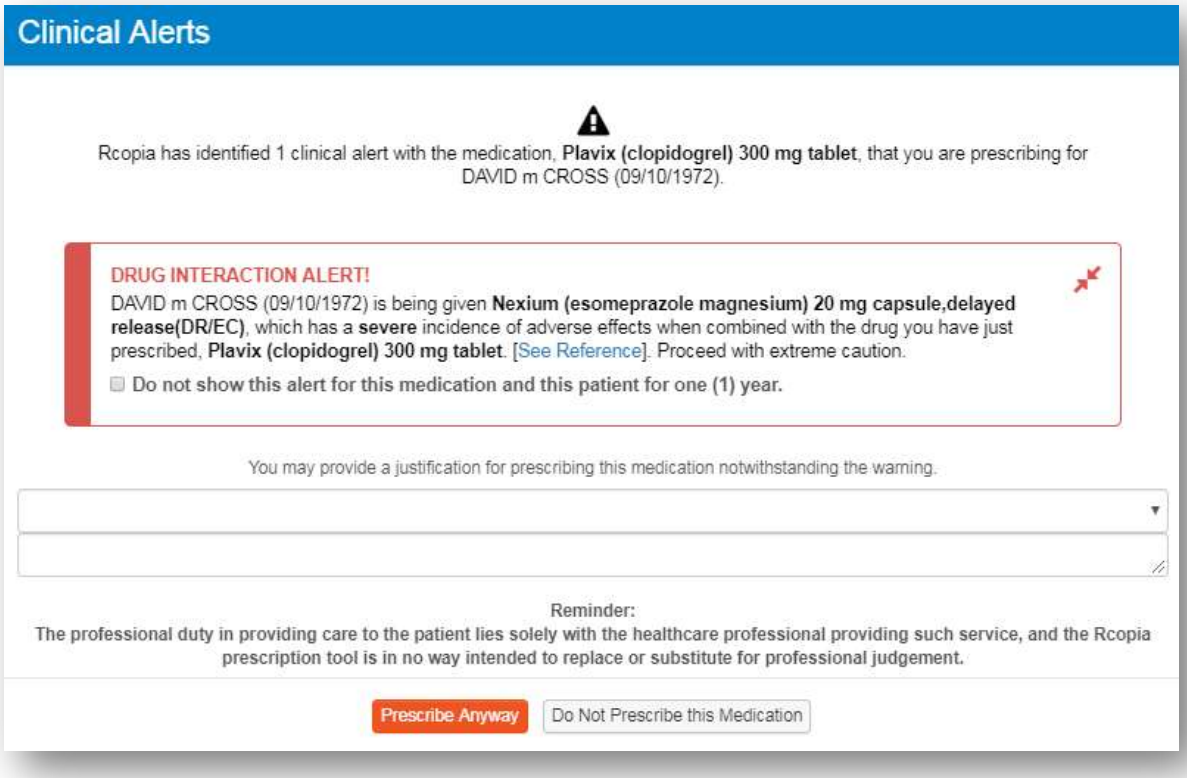
Please Note: If you have pop-up blockers enabled, the print window will not display for either of these reports. You will have to turn this feature off to view and print the browser.

Clinical Alerts

Rcopia 4 has a variety of clinical alerts within the system to ensure that you have information that may be pertinent in the prescribing process. All clinical alerts appear in red. Below is the list of all the clinical alerts within Rcopia 4:

- Drug-Drug Interactions
- Drug-Allergy Interactions
- Drug-Diagnoses Interactions
- Pregnancy
- Lactation
- Dose Check
- Duplicate Therapy
- Geriatric Precautions
- Pediatric Precautions

When a drug is chosen that prompts a clinical alert, Rcopia 4 will display the alert on the screen. Providers may choose **Prescribe Anyway** to continue prescribing or **Cancel** to cancel the prescription. If you choose **Prescribe Anyway**, you can provide a justification for prescribing the medication despite the warning (optional).



Drug interaction alert
When prescribing medications, Rcopia 4 will check against the active medication list for drug-drug interactions. Alerts appear after you have chosen a drug and corresponding strength. These alerts will have a reference section that can be accessed by clicking the arrows to the right of the message.

Allergy interaction alert
When prescribing medications, Rcopia 4 will alert you if you are prescribing a medication that is associated with a drug on the list of allergies and adverse reactions. The alerts will appear after you have searched for the drug and chosen the strength.

Drug-Diagnosis interaction alert
When prescribing medications, Rcopia 4 will alert you if you are prescribing a medication that may interact with a diagnosis or Problem documented for your patient. The alerts will appear after you have searched for the drug and chosen the strength.

Pregnancy and Lactation interaction alert
You can input a patient's pregnancy or lactation status in the **Patient Info** widget. Once selected, you will receive any precautions associated with pregnancy or lactation.
Clicking on the arrows to the right of the message will provide you with more information pertaining to the alert.

Duplicate check
A duplicate check alerts the user if he or she has prescribed two drugs in the same therapeutic class.

Dose check
A dose check alerts the user if he or she has prescribed a medication amount that is above or below the maximum or daily dose for that medication.

Geriatric Precautions
Geriatric precautions are based on the Beers list, which indicates that certain medications may not be appropriate in the elderly.

Pediatric Precautions
Pediatric precaution alerts pertain to medications prescribed for the pediatric population. In some cases, certain drugs are not recommended for this population.

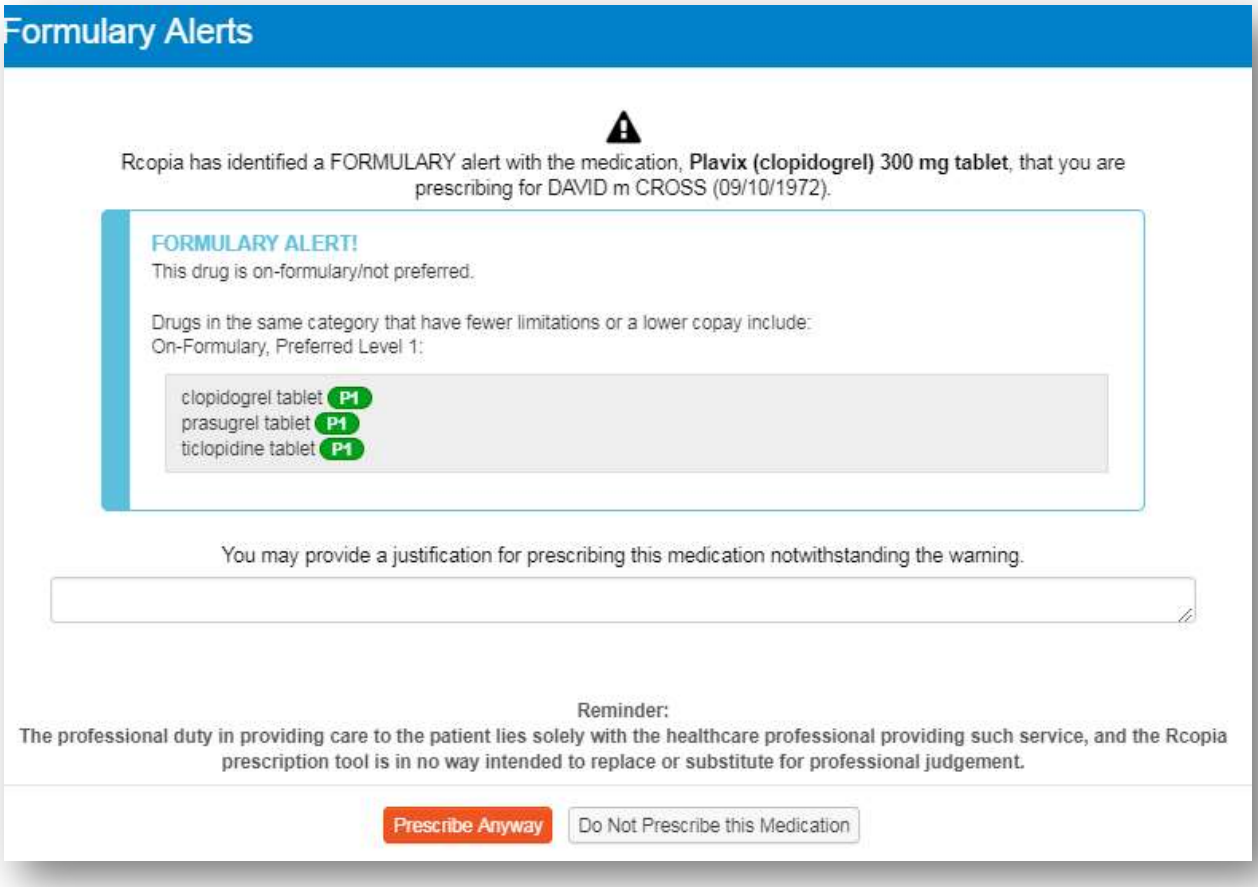
Formulary Alerts

All Rcopia 4 users have formulary checking enabled. Formulary information in Rcopia 4 is obtained from SureScripts.

1. When you select a patient, Rcopia 4 will automatically search for his or her eligibility using the patient's first and last name, ZIP code, and DOB.

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

2. If you try to prescribe a medication that is not covered, or has higher co-pay, you will receive a formulary alert in the system.

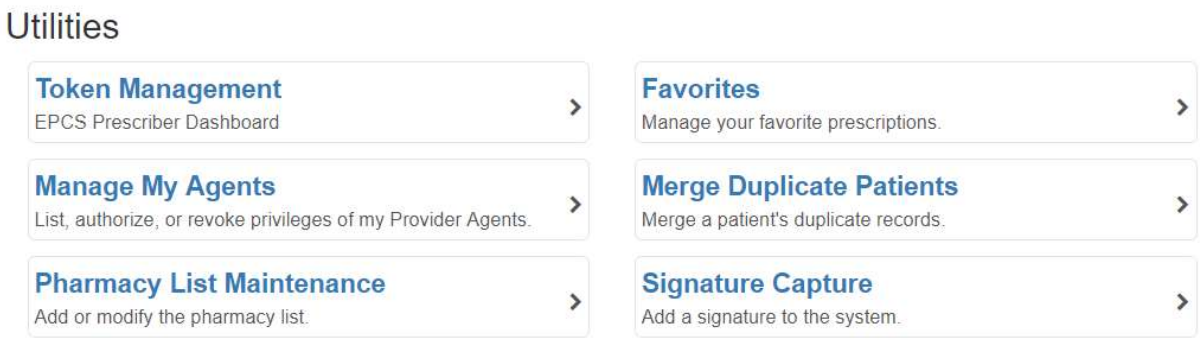


3. The user can override the alert, or select from the list of alternatives and prescribe a medication that may have lower co-pay.

Utilities

There are many additional options available in the Rcopia 4 application. To access them, click on the Utilities link within the list icon in the top left hand corner of the page. Several of these utility features are for reference, or have already been configured and performed for your practice upon purchasing the software. Briefly, these Utilities include:

- **Manage My Favorite Prescriptions**: allows users to add prescriptions to their Favorites list without being used in a patient's record previously. A current list of your favorite prescriptions is provided in the Favorites drop-down list.
- **Manage My Agents**: allows a provider to manage their provider agents. A provider agent is a clinical user that can take action on prescriptions on behalf of a provider.
- **Merge Duplicate Patients**: Merge a patient's duplicate records.
- **Pharmacy List Maintenance**: allows users the ability to add or modify the practice pharmacy list.
- **Members Area**: Update account information, add office locations, view user summary, register new users.
- **Supervisor Management**: Designate supervisors.

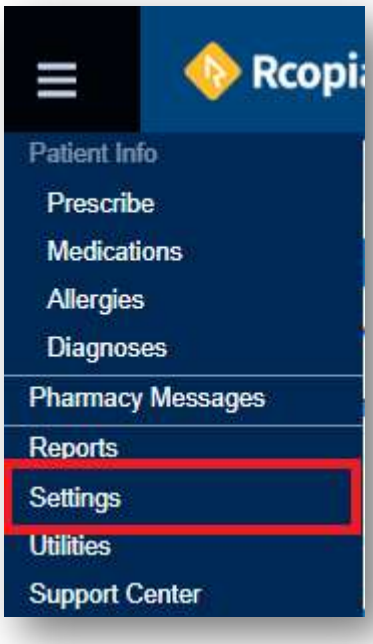


Accessing Rcopia User and Location Preferences

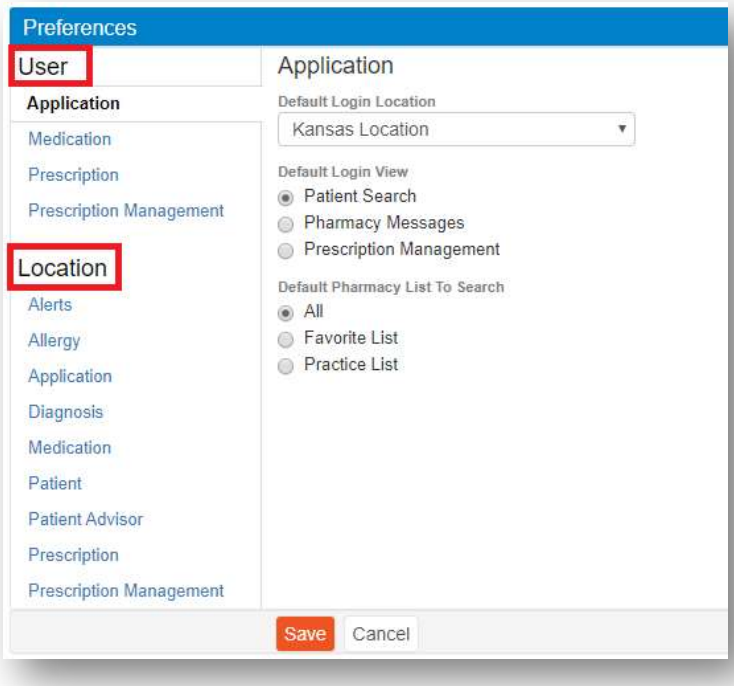
User preferences will only apply to the account on which the preferences are set. Location preferences can only be set by an administrator and will apply to all users within a practice location.

How to Set Preferences

1. To access either user or location preferences, you will first need navigate to the **Settings** menu. This can be accessed by clicking on your name in the top right **corner**, or by hovering over the menu icon in the top left and clicking **Settings**.



2. Then, click the **Preferences** option.



3. Use the screens to set preferences as desired. Each user preference is explained in the **User Preferences Defined** section of this manual, and each location preference is explained in the **Location Preferences Defined** section of this manual.
4. Click the **Save** button on either screen to ensure changes are applied.

User Preferences Defined

Application

- **Default Login Location:** Allows users who are connected to more than one location to set their default location when starting Rcopia.
- **Default Login View:** Preference allows a user to determine what screen they will begin on when entering e-prescribing.
  - Patient Search **(default)**
  - Pharmacy Messages
  - Prescriptions Management
- **Default pharmacy list to search:** Allows users to determine which list will be defaulted when searching for a pharmacy.
  - Favorite List
  - Practice List
  - All Lists **(default)**

Medication

- **Ask to reconcile prescription vs. medication when only quantity has changed:** Allows users to control whether the reconciliation screen should appear when prescribing an already active medication and changing just the quantity.
  - No **(default)**
  - Yes
- **Hide inactive medications older than:** Allows users to set limitations for medication history results.
  - No Limit **(default)**
  - 3 Months
  - 6 Months
  - 1 Year
  - 2 Years

Prescription

- **Populate sig fields from previous prescriptions ("sticky" feature):** Allows the system to populate the sig fields with how the most recent providers at the practice

prescribed the selected medication. This will work with prescriptions written within the past 14 days.

- **Include patient allergies on printed/faxed prescription:** Allows users to determine whether or not they would like patient allergies to display on printed/faxed prescriptions.
- **Custom additional directions to patient (one per line):** A custom prescription note may be no more than 210 characters in length. If a prescription exceeds the limit, it will be sent via fax to the pharmacy. Users can find and use these notes through the **+** icon on the sig page next to the **Additional Directions to Patient** text field.
- **Custom pharmacist notes (one per line):** Users can find and use these notes through the **+** icon on the sig page next to the **Directions to Pharmacist** text field.
- **Custom prescription comments (one per line):** Users can find and use these notes through the **+** icon on the sig page next to the **Comments for Office Use Only** text field.

Prescription Management

- **Include cancelled prescriptions:** Allows user to determine whether or not they wish to view cancelled prescriptions when reporting.
- **Include prescriptions from other locations:** Allows users to determine if they wish to view all prescriptions from other offices they are connected to (user has to be connected to more than one location in order to set this user preference).
- **Default Display Range:** Allows user to set default time range for reporting.
  - Today **(default)**
  - Past 3 Days
  - Past 7 Days
  - Past 14 Days
  - Past 30 Days
- **Default provider selection:** Allows users to select a provider that the system will default to when creating prescriptions.
- **Default status view:** Allows a user to determine which prescription status they wish to set when reporting.
  - Pending Prescriptions **(default)**

- Completed Prescriptions
- All Prescriptions

Rcopia Location Preferences Defined

Alerts

- **Allow providers to suppress duplicate clinical alerts for 1 year:** If **Yes**, clinical alerts can be suppressed for one year after they are initially received by a provider. This allows providers to avoid receiving the same alert continually.
- **Duplicate therapy check against External Medication History (past 120 days):** If **Yes**, Rcopia utilizes a patient's PBM/Pharmacy history (if available) for duplicate therapy checks. Providers will want to confirm that the patient is taking the medication on the history before making a clinical decision.
- **Drug-drug interaction against External Medication History (past 120 days):** If **Yes**, Rcopia utilizes a patient's PBM/Pharmacy history (if available) for drug-drug interactions. **(default)**
- **When a user overrides prescription warnings:**
  - Require Users to Enter a Reason
  - Allow Users to Enter a Reason, But do not Require It **(default)**
  - Do not Permit Users to Enter a Reason
- **Drug-allergy interactions:**
  - All warnings **(default)**
  - Ingredient and Specific Group Allergies Only
- **Drug-diagnosis interactions:**
  - Contraindicated for Exact Diagnoses Only **(default)**
  - Contraindicated for Exact and Related Diagnoses
  - Contraindicated or Evaluation Needed for Exact Diagnoses Only
  - Contraindicated or Evaluation Needed for Exact diagnosis and Related Diagnosis
  - All Warnings for Exact Diagnoses Only
  - All Warnings for Exact and Related Diagnoses
- **Drug-drug interactions:**
  - All interactions **(default)**
  - Severe and Contraindicated Only

- Contraindicated Only
- **Geriatric warnings:** The system will alert the user for any geriatric alerts within the system. **All Warnings** is the recommended setting for this setting.
- **Pediatric warnings:** The system will alert the user for any pediatric alerts within the system. **All Warnings** is the recommended setting for this setting.

Allergy

- **Enable "Allergy Severity"**: Allows an optional allergy severity dropdown to appear when recording allergies.

Application

- **Allow partial date for medication and allergy onset:** If **Yes**, users will be able to add use partial start dates when adding medications and allergies. For example, a user will be able to add a start date by indicating the year only, not a month or day. If **No**, a user will have to input the month, day, and year for a given start date.
- **Allow providers to manage their provider agents:** If **Yes**, providers can manage agents by clicking the left top menu icon, clicking **Utilities**, and clicking into **Manage My Agents**.
- **Include enterprise name with location name:** If **Yes**, the enterprise name will be displayed across the top of the screen.

Diagnosis

- **Supported diagnosis codes**: Allows diagnosis codes as options in the diagnosis widget. Options are **ICD-10 (Complete)**, **ICD-10 (Billable)**, **SNOMED CT**, **ICD-9**.

Medication

- **Allow incomplete drug definition:** If **Yes**, users will be able to add medications onto the active medication list without selecting a strength of the given medication.
- **Enable "Quick Add" without medication details:** If **Yes**, users will be able to quickly add medications onto active medication list with only the medication and strength.
- **Allow specifying medication history source:** If **Yes**, users will be able to view where a medication history result came from.

- **Retain office comments and directions to Pharmacist when renewing/prescribing a medication:** Allows previous notes to the pharmacist and staff to be retained on renewals.
- **Show prescriber name on medication reports:** If **Yes**, automatically displays prescriber name on medication report.
- **Default external medication:**
  - No Automatic Search
  - Last 30 Days **(default)**
  - Last 90 Days
  - Last 180 Days
  - Last 365 Days

Patient

- **Enable Transition of Care logging:** If **Yes**, the link will appear within the patient chart, allowing the user to document the TOC date. If **No**, the transition of care link will not appear within the patient chart.
- **Include Transition of Care and encounter data in EMR/PMS interface data:** If **Yes**, transition of care and end encounter information will be sent back to the PMS or EMT. If **No**, the date will be retained in Rcopia only.
- **Label prefix for patient External ID:** Text box provided to provide an External ID label for aforementioned External ID name.
- **System name required to enter patient External ID:** This is the identifier used to link Rcopia to a Practice Management or EMR. This would be a required entry for all new patients added to Rcopia**.**
- **System name of patient External ID to display on prescriptions and reports:** Text box provided to automatically display patient/external ID on all prescriptions and reports. Not used by smaller practices

Patient Advisor

- **Enable adherence plans:** If **Yes**, users will be prompted of adherence plans (if available) while prescribing.
- **Enable patient education material and/or support programs:** If **Yes**, users will be able to access educational material that can be provided for patients.

- **Enable electronic Prior Authorization (ePA):** If **Yes**, the ability to process prior authorizations will appear.

Prescription

- **Allows prescriptions to be saved as pending without sig and quantity:** If **Yes**, this allows prescriptions to be generated and saved without including sig or quantity data. This is good for the staff who do not know the sig but can still create and send to the physician's queue for completing. **(default)**
- **Allow a provider to approve a prescription without entering a signature password (Certain states require signature passwords to be used as part of the electronic prescribing process; please refer to your state rules prior to disabling this feature.):** If **Yes**, providers will be able to send prescriptions to the pharmacy for filling without having to enter a signature password.
- **Require Providers to retroactively sign prescriptions sent by an agent under the provider's name:** If **NO** providers will not be required to sign prescriptions sent by provider agents on their behalf.
- **Enable Patient Notification via SMS text:** If **Yes**, this checkbox that appears in the **Pending Prescription for the Patient** section of the patient summary screen and the prescription review screen will be checked by default. This will allow an SMS text message to be sent to the patient upon signing a prescription. Patients will be able to see the pharmacy to which the prescription was sent along with coupons and drug pricing.
- **Medication stop date auto-set based on prescription duration:** If **Yes**, automatically discontinues an active medication when the duration expires. Medication automatically moves to inactive medication list.
- **Populate sig fields from previous prescriptions ('sticky' feature):** Allows the system to populate the sig fields with how the most recent providers at the practice prescribed the selected medication. This will work with prescriptions written within the past 14 days.
- **Enable prescription controls on the Review Prescription screen:** If **Yes**, this allows practice to add the "Action" buttons to the Review Prescription screen.
- **Require provider to sign prescriptions printed by staff:** If **Yes**, provider signatures are needed on printed prescriptions.

- **See pending and undeliverable prescriptions across all of your locations:** If **Yes**, users will be able to see pending and deliverable prescriptions from other locations.
- **Include link to drug information reference site on prescribe screen (not affiliated with DrFirst):** If **Yes**, Rcopia will automatically provide a link on the 'Enter Details' screen to access a drug reference website (RxList).
- **Show practice name on reports:** If **Yes**, automatically displays practice name on prescription and medication reports.
- **Remember signature password for:** Allows system to remember signature password for selected amount of time.
  - Never (**default**)
  - 5 Minutes
  - 15 Minutes
  - 30 Minutes
  - 45 Minutes
  - 60 Minutes
- **Enable Practices Favorites List:** If checked, the permitted users (determined by options below) will be able to use and modify favorites created at a practice level.
  - **Admin** (cannot be unchecked)
  - **Only Prescribers with Signing Permission**
  - **All Users**
- **Enable Location Favorites List:** If checked, permitted users (determined by options below) will be able to use and modify favorites created at a practice location level.
  - **Admin** (cannot be unchecked)
  - **Only Prescribers with Signing Permission**
  - **All Users**
- **Enable User Personal Favorites:** If checked, users will be able to save and access their own favorite list.
- **Enable Recently Prescribed Display:** If checked, users will be able to access a list of recently prescribe favorites.
- **Prescription security features note to include on printed prescriptions (max 100 chars):** Allows a printed message to appear on all prescriptions practice wide.

- **Custom additional directions to patient (one per line):** A custom prescription note may be no more than 210 characters in length. If a prescription exceeds the limit, it will be sent via fax to the pharmacy. Users can find and use these notes through the **+** icon on the sig page next to the **Additional Directions to Patient** field.
- **Custom pharmacist notes (one per line):** Users can find and use these notes through the **+** icon on the sig page next to the **Directions to Pharmacist** field.
- **Custom prescription comments (one per line):** Users can find and use these notes through the **+** icon on the sig page next to the **Comments for Office Use Only** field.

Prescription Management

- **Default pending prescription box to checked:** If **Yes**, ensures that all pending prescriptions on the pending prescription report are checked. **No** is recommended so that physicians have to choose the prescriptions they desire to approve and do not accidentally approve another physician's prescriptions.
- **Show complete comments on reports:** If **Yes**, office comments are in reports.
- **Show patient's responsible provider on reports:** If **Yes**, the patient's primary care provider (PCP) is displayed in the status bar.
- **Show pharmacy name on reports:** If **Yes**, pharmacy name will display on reports

Report a Problem / Help

If you have any questions or require assistance with any usage or account issues, you can contact your support resource or DrFirst's 24/7 Support Team.

Please Note: If you are a partner user, please contact your EMR's support team instead.

If contacting DrFirst Support, please have your username / login name to help us expedite your service request. You can reach us through the below channels.

- Call us 24/7 at (866) 263-6512.
- Log in to your JIRA Service Desk account to submit an online support request.

If you do not yet have a JIRA Service Desk account, please work with your Account Manager, Implementation Specialist, or our Support Team.