PharmForce User Guide

Intake Module

Crescent Healthcare, Inc.
User Assistance & Training

PharmForce User Guide
Intake Module

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Preface

This user guide provides conceptual information and procedures for working with the PharmForce intake module. It is geared toward intake specialists who understand the business process for managing the intake process at Crescent but who need information on using PharmForce to manage that process.

This guide contains the following topics:

- Working with PharmForce

- Intake module overview

- Concepts and procedures for intake functions, including:

  - Patients

  - Insurance

  - Episodes

  - Medical information

  - Documents

  - Notes

- Intake reports

1. Working with PharmForce

This chapter provides a brief overview of PharmForce and the Salesfoce.com (Salesforce) platform on which PharmForce runs. It also provides procedures for performing basic tasks in PharmForce that are not specific to any one module.

Overview of PharmForce

PharmForce is a Web-based application that works on the Salesforce platform. You don't have to know Salesforce to work with PharmForce, but it is helpful to understand that the way PharmForce works is based largely on the way Salesforce works. Also, managing certain information in PharmForce may require using some features specific to Salesforce. This chapter, therefore, is based to some extent on Salesforce functionality.

Regardless of which pages or modules you work with in PharmForce, there are some general concepts that apply to all parts of the application. This chapter discusses these concepts.

> ⓘ **Note:** This guide may refer to both Salesforce and PharmForce. References to Salesforce are made when the related functionality is generic to all of Salesforce. References to PharmForce are made when the related functionality applies specifically to the PharmForce application within Salesforce.

Web Access Requirements

PharmForce is a Web-based application, so you must have an Internet connection and a Web browser to use the application. PharmForce can work with standard Web browsers such as Microsoft Internet Explorer and Mozilla Firefox; however, you should check with the Help Desk for the latest corporate standard at Crescent.

You must also have JavaScript enabled in your Web browser. Since JavaScript is usually enabled by default, you should only have to enable it if you have previously disabled it.

Accessing Help and Other Documentation

There are several forms of help and documentation to help you understand and work with PharmForce:

- **Page Help:** Each page in PharmForce has a **Help for this Page** link at the top right of the PharmForce panel. Click this link to access documentation specific to the PharmForce page you currently have open.

- **Field Help:** Some fields in PharmForce pages contain a small help icon to the left of the control or text box (   ). When this icon is present, you can hover your cursor over the icon to see quick popup help about the corresponding field.

- **User Guides:** User guides provide functional information to help you work with PharmForce. You can access the user guide for the module of your current PharmForce page by clicking the **User Guide** link at the top right of the PharmForce panel or in the page's corresponding help topic. User guides are also available through Content in Salesforce as well as CHIP.

- **Training Guides:** Training guides provide information to supplement the curriculum presented in a particular training class. While training guides should be considered supplements to their corresponding classes, they are still useful to read outside of training to obtain more information about business processes and how PharmForce works to meet those business process needs. You can access training guides for the module of your current PharmForce page by clicking the **Training Guide** link in the page's corresponding help topic. Training guides are also available through Content in Salesforce as well as CHIP.

- **Salesforce Documentation**: While you do not need to know Salesforce to work with PharmForce, you might want to become acquainted with it to help you work better while in the Salesforce environment. The Salesforce header at the top of the page contains a **Help & Training** link that you can click to access a library of Salesforce documentation.

Logging in to PharmForce

Before you can log in to PharmForce, you must have a user name and password for the Salesforce system. Your user name should be your Crescent email address. If you do not have your login information, contact the Help Desk.

> ⓘ **Note:** When you are first assigned an account in Salesforce, the system automatically sends you information to perform an initial login. During this process you are required to set your password.

➤ **To log in to PharmForce:**

1. In your Web browser, access the following URL:

   `https://login.salesforce.com`

   > 💬 **Tip:** You can bookmark this URL in your Web browser or save it as a shortcut to make it easier to access in the future.

2. Type your user name and password in the respective **User Name** and **Password** boxes.

   You can select the **Remember User Name** checkbox so your user name is automatically populated in the **User Name** box the next time you access the login page. You will still be required to provide your password.

3. Click **Login** or press **[Enter]**.

4. When Salesforce opens, select the application or module you want to work with in the selection box to the right of the **force.com apps** logo (at the top right of the page):
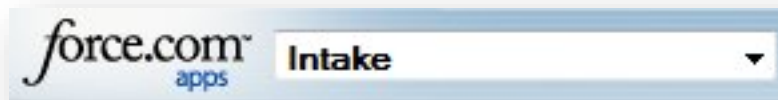
For the intake module, select **Intake**.

Using General Menus and Navigation

Since PharmForce is based on the Salesforce platform, the general menu structure and navigation is similar to that of Salesforce. Most of these elements are in a tab and menu structure at the top of the page, along with menu items to the left side of the page.

Salesforce Header

At the top of the page is a standard Salesforce header containing tabs to major functionality, as shown in the following example:
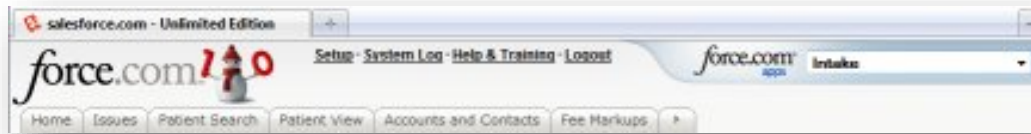
In this example, you could select a module from the selection box to the right of the **force.com apps** logo, click the **Patient Search** tab to access patient search functionality, or click any other tab to access the corresponding functionality.

> ⓘ **Note:** The specific tabs you see in the Salesforce header depend on the application or module you have selected and any customized tab settings you have set in Salesforce.

Page Navigation

Below the standard Salesforce header is the page you currently have selected. At the top of the page are more menu links and tabs, depending on the specific page you have open, as shown in the following example:
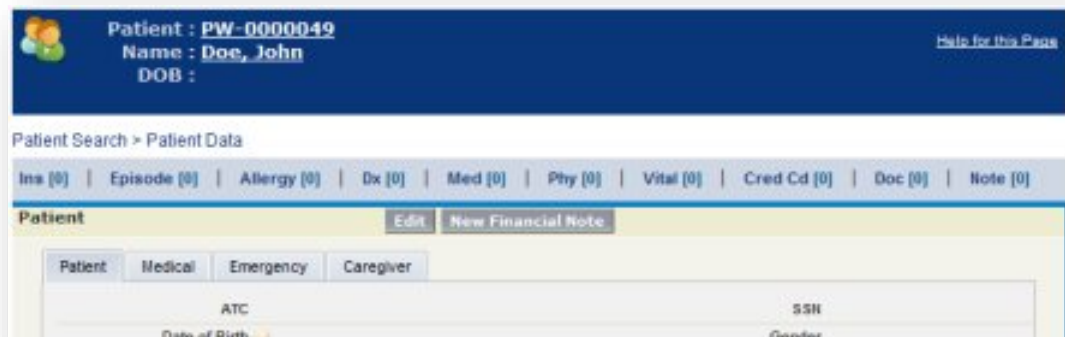
In this example, you could click the breadcrumb link to move back to a higher level page (**Patient Search** in this example). Breadcrumb links, when available, are the links above the horizontal menus that show the navigation path to the current page. You click one of the links in the breadcrumb to navigate back to the selected page.

Depending on the current page, you could also click any of the major menu links (**Episode**, **Allergy**, etc. in this example) below the breadcrumb links, or click subtabs (**Medical**, **Emergency**, etc. in this example) within the specific page panel to access that functionality.

Side Navigation

To the left of the page is a side navigation section where you can access several different features:

- **Search system for general Salesforce data:** The **Search** section enables you to search on Salesforce-specific data, such as business leads and opportunities. Search items that are more relevant for your work with PharmForce would be Accounts and Contacts. For example, if you need to search for a contact at a referring facility, you could select **Contacts** in the **Search** box and then type the name of the contact you want to find. If the contact did not come back as a search result, then you could select **Accounts** and search for an existing account for the facility.

- **Access to general Salesforce features:** You can create work-related objects, such as tasks and events, under the **Create New** selection box. For example, a supervisor might want to assign a task in PharmForce to let another user know about a task they must perform.

- **Related menu objects:** You can access quick links to pages related to the module under which you are working. For example, the module's menu links also appear in the side navigation.

- **Recently accessed items:** Depending on the current page, you can access recently viewed objects such as recent patients or episodes.

The following example shows the side navigation:
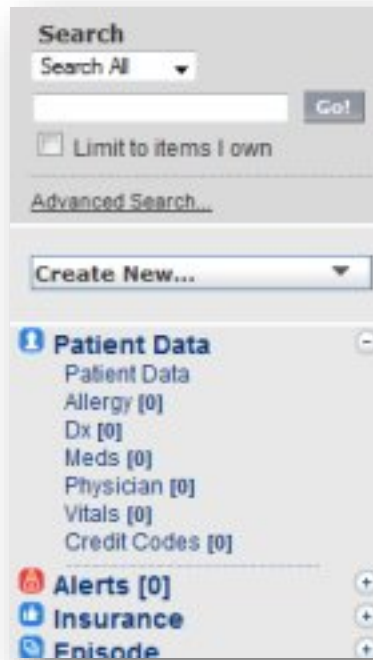
In this example, you could perform a search, create a new object (such as a task), or access different items for the current patient (under **Patient Data**) to access the corresponding functionality.

Using Application Controls

Most of the application controls in PharmForce are similar to controls you use in other computer applications. For example, most text boxes and checkboxes work the same way as they do in all standard computer applications. However, there are a couple of application controls in PharmForce you may not have seen before.

Lookups

A lookup is a search system that opens in a popup window to allow you to find possible values for a corresponding field. The following example shows a text field with a lookup option:
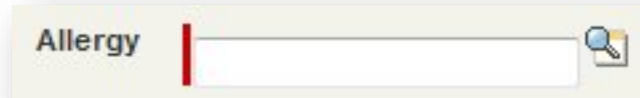
In this example, you could click the icon to the right of the text box to open the following lookup in a popup window:
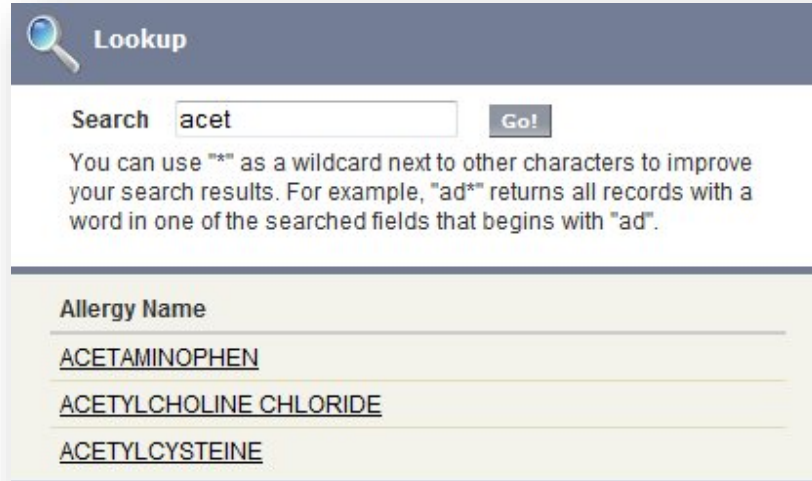
The lookup in this example allows you to search for allergies. In this example, the user typed the first few letters of a word in an attempt to find *acetaminophen*. When the user clicked **Go**, the system found all matches for the search phrase.

When you find the appropriate match in the lookup (in this example, **ACETAMINOPHEN**), simply click the link for that item and it is automatically entered in the corresponding text box.

You do not have to use a lookup when it is available (you can type the text directly if you know what to type). However, PharmForce will display an error if you do not type an item that matches the items in the corresponding lookup.

Adding New Items to a Lookup

Occasionally you might find that an item you search for in a lookup does not exist within that lookup. Depending on the lookup, you can add a new item. If a **New** button appears in the lookup, click it to open a page where you can enter information for the new lookup item. After you save the new item, it will be available for selection in the lookup. If a **New** button does not appear in the lookup, then you do not have the appropriate permission to add the new lookup item.

Selection Boxes (Pick Lists)

Selection boxes (called *pick lists* in Salesforce) work the same way as they do in all standard computer applications. However, you will notice that some selection boxes have a default value of **--None--**, as shown in the following example:
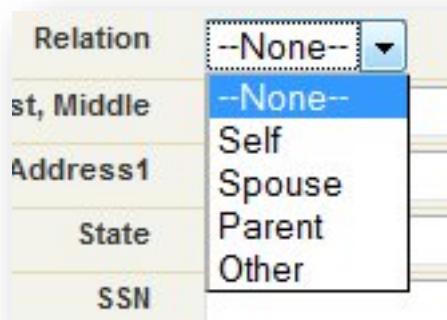
The selection box in this example shows that the currently selected value for **Relation** (relationship to the patient) is the default value **--None--**. However, **--None--** does **not** mean there is no relation to the patient. It simply means a selection is not made. In this example, if the relation to the patient were not self, spouse, or parent, the best selection may be **Other**.

Similarly, if you perform a search that includes a selection box for narrowing search results, selecting **--None--** simply means you are not specifying a value to search on in that selection box. For example, when searching for a patient, if you keep the value **--None--** selected in the **Gender** box, the search system simply ignores gender when performing the search.

Dates

In addition to typing a date in a date field, you have two options for simplifying your entry:

- Click the date link to the right of the text box (the date link shows the current date) to automatically insert the current date in that text box.

- Click inside (or tab into) the text box to open a popup calendar beneath the text box. You can then navigate to a date and select it to automatically insert the selected date in the text box.

Multiple Ways to Perform the Same Task

As with many software applications, PharmForce offers multiple ways to perform certain tasks. For example, if you want to add insurance to a patient record, there are several ways to access the **Insurance** page, such as clicking **Insurance** on the side menu, clicking the **Ins** menu item above the active panel, or hovering the cursor over the **Ins** menu item above the active panel. All three of these methods will yield the same result. However, you can determine which method works best for your work process.

In this user guide, only the common method for performing a task is provided as opposed to listing all possible methods.

Working with Accounts and Contacts

Accounts and contacts are part of the general Salesforce application and not necessarily limited to PharmForce. For example, a Crescent account executive might look up contact information in Salesforce to make a phone call to a physician, while a PharmForce user might look up the same contact information in PharmForce to specify the contact as a physician in a patient form.

You might find when you are specifying a contact in PharmForce that the required contact is not available in the contact lookup. For example, if you are entering a referral contact for a new patient the contact might not exist in the lookup. Or if you are entering a nurse from a medical facility, the nurse might not be in the lookup. In such a case it is likely that an account for the contact's organization exists, but the contact simply has never been added to the account. In this situation you can add the contact to their corresponding account, and then they will be available for selection in the lookup.

For detailed information on contacts and accounts, refer to Salesforce documentation.

➢ **To add a contact:**

1. In the same lookup window where you searched for the contact, click **New**.

2. When the form opens, enter the information for your new contact. Some contacts require you to specify an associated account. You can select the account by using the corresponding lookup. If the account you need does not exist, you must notify the Contracts Manager.

3. Click **Save**.

   The contact is added to the database, and you can now perform a lookup to find that contact.

Working with Tasks and Events

Tasks and events are part of the general Salesforce application but can be used specifically for PharmForce processes. For example, an intake supervisor might use a task to assign a patient intake to a particular specialist, or a pharmacist might use an event to schedule a meeting with other pharmacists to review a PharmForce process.

For detailed information on tasks and events, refer to Salesforce documentation.

➢ **To create a task:**

1. In the side menu, select **Task** in the **Create New** selection box.

   The **Task Edit** page opens.

2. Enter the task information. To save a task, you must provide at least:

   – The user to whom the task is assigned

   – Subject for the task

   – The task status and priority

3. Click **Save & New Task** if you want to add another task, or click **Save** if this is the only task.

➢ **To create an event:**

1. In the side menu, select **Event** in the **Create New** selection box.

   The **Event Edit** page opens.

2. Enter the event information. To save an event, you must provide at least:

   – The user to whom the event is assigned

   – Subject for the event

   – The event start and end date and time

3. Click **Save & New Event** if you want to add another event, or click **Save** if this is the only event.

Saving Information

To save information on any page, click the **Save** button on that page. You should always save information on a page before navigating to another page.

> ⚠ **WARNING:** Before you close your Web browser or navigate away from a page (including if you click your Web browser's back button), be sure you save any information you added or changed on the page or else you risk losing your changes.

To save any information on a page, you must have entered information in all required fields. Required fields are flagged with a red marker, as shown in the following example:

In this example, only the **Last Name** field is a required field.

Deleting Information

Due to regulatory reasons, you cannot delete patient-related records in PharmForce. If you accidentally enter incorrect information, then you should first see if you can correct the information within PharmForce. For example, if you accidentally enter the wrong insurance name for a patient, you might still be able to correct the insurance record simply by editing the information inside it. However, if you cannot resolve the issue with such an edit, then you should create a new insurance record with the correct information. You could then invalidate the incorrect insurance record by specifying an effective end date that is in the past.

Certain pages might contain a **Delete** button for removing information. When you click a **Delete** button, the system simply submits a request for the deletion to an administrator. The administrator then reviews the deletion request and either confirms the deletion or denies the request.

2. Intake Module Overview

This chapter provides a brief overview of the intake module and workflow concepts as they apply to the intake module.

Overview of the Intake Module

The intake module enables PharmForce users to enter patient information into the PharmForce system and to add all of the pre-orders and referral information for the therapy the patient will undergo.

There are many concepts and procedures around managing the intake process in PharmForce for each patient, all of which are discussed in this user guide.

Intake Workflow

The intake workflow in PharmForce starts when you add or open a patient record and ends when you complete a financial obligation (FOB) for the patient's therapy. There is no static workflow for the PharmForce intake process since the system is designed to support the dynamic workflow of the intake specialist when entering patient information.

As you work in the system, you can navigate to different intake pages to enter information about the patient as you obtain it. However, you should keep in mind two important concepts about the requirements to save the patient record and create the FOB for the patient:

- **Required information:** Required information in the intake module is information that you must enter in order to save the information on the current page. The fields on the page for required information are flagged with a red marker (refer to *Saving Records* on page 10).

- **Necessary information:** Necessary information in the intake module is information that must be in the system to complete the order and generate the FOB. The fields on the page for necessary information are identified by pink label text. PharmForce does not allow you to generate the FOB unless all necessary information is provided.

You might complete several pages and save all **required** information on those pages, but the intake process for the patient will not be complete until you have provided all **necessary** information.

For example, if you are entering patient contact information on the **Patient** page, you might enter only the patient's last name to simply create and save the patient record in PharmForce. Since only the patient's last name is required on this page, PharmForce allows you to save the record. However, until you return to the **Patient** page and enter other necessary information, the system will not allow you to complete the order and generate the FOB.

➤ **The typical intake process in PharmForce is:**

1. Access an existing patient record or create a new one.

2. Enter medical related information for the patient, such as physicians, diagnoses, and medications.

3. Enter insurance information if the patient is new or if an existing patient's insurance has changed.

4. Create an episode for the patient's treatment, adding appropriate pre-orders for pharmacy, nursing, equipment, and supplies.

5. Generate the FOB for review with the patient.

3.   Patients

This chapter discusses the patient record in PharmForce and provides procedures for creating and editing patient records.

Overview of Patients

The patient record in PharmForce is the parent object for all other data you enter in the intake module. Before you can enter any other information such as insurance or episodes, you must have a patient record to which you can apply that information.

> ⓘ **Note:** There are several objects in PharmForce directly related to the patient such as allergies, diagnoses, and physicians. These related objects are discussed in the chapter *Other Features*, which starts on page 43.

Searching for and Accessing an Existing Patient

You can see if a patient already exists in PharmForce by performing a patient search. If PharmForce finds the patient, you can access their existing record to work with it.

➢ **To search for an existing patient:**

1. When logged in to the PharmForce intake module (refer to *Logging in to PharmForce*, on page 2), click the **Patient Search** tab at the top of the page.

2. When the **Patient Search** page opens, enter as much information as you have to perform the search. However, keep in mind that the search is only as effective as the information you enter.

   For example, if an existing patient's first and last names are John and Doe, but you enter `Jon` and `Doe` for the search, the system would not be able to find the names as a match. In this situation, if you were not sure of the

spelling of the first name, you could instead enter `J` (for the first name) and `Doe` (for the last name). Then the search will result in a match if the first name is Jon or John (or Jane, Jeff, or any other name beginning with "J").

3. Click **Search**.

4. After PharmForce performs the search, the **Results** panel opens with a list of any matches to your search (the **Results** panel is empty if no matches are found).

5. If a patient match is listed in the **Results** panel, click the link for the patient to open their record.

Using Patient Views to Access Patients

You can view lists of patients in PharmForce based on certain parameters. For example, you can access a list of all patients in the system or access only patients that you have created. A filtered list of patients such as this is called a view. From a patient view, you can select a specific patient to work with their record.

PharmForce has a default set of views that you can access under the **Patient View** tab. You can also create your own custom views under the **Patient View** tab so that you can list patients based on your own custom parameters.

➢ **To select a patient view:**

1. When logged in to the PharmForce intake module (refer to *Logging in to PharmForce*, on page 2), click the **Patient View** tab at the top of the page.

2. In the **View** box, select the view you want to access. The views are described in the previous table.

   The patient list refreshes to display only patients that match the parameters of the selected view.

➢ **To create a custom patient view:**

> ⓘ **Note:** Creating and editing custom views are basic features of Salesforce and are not specific to PharmForce. For more information on views, refer to Salesforce documentation.

1. When logged in to the PharmForce intake module (refer to *Logging in to PharmForce*, on page 2), click the **Patient View** tab at the top of the page.

2. Click **Create New View**.

    The **Create New View** page opens.

3. Specify the parameters you want for the custom view. To save a view, you
    must provide at least the information for any fields flagged with a red
    marker.

4. Click **Save**.

Adding a New Patient

Before adding a new patient to PharmForce, you must perform a search to see if
the patient already exists (refer to *Searching for and Accessing an Existing
Patient* on page 15). If the patient does not already exist, then you can add a new
record for them.

➢ **To add a new patient:**

1. When logged in to the PharmForce intake module (refer to *Logging in to
    PharmForce*, on page 2), click the **Patient Search** tab at the top of the
    page.

2. When the **Patient Search** page opens, click **New**.

    The **Create New Patient** panel opens, where you can enter preliminary
    patient information.

3. Enter as much information as you have with regard to the patient's name
    and date of birth.

4. Click **Check Patient** to see if there are any existing records that match
    your patient information.

    Search results appear in the **Results** panel, below the **Create New Patient**
    panel. If the patient exists, you can click the corresponding link to open
    their patient record.

5. If a record does not already exist for your patient, click **Proceed to Create
    New**.

    A message opens to remind you to verify that the patient does not already
    exist in the system.

6. Click **OK** in the message box to continue with creating the new patient, or click **Cancel** if you want to stop the process.

   If you click **OK** in the message box the **Patient** page opens, where you can enter the new patient's information.

7. Enter your patient information. To save a new patient record, you must provide at least the information for any fields flagged with a red marker.

8. Click **Save**.

Entering General Patient Information

General patient information includes such data as demographics, medical information, and emergency contacts.

➢ **To enter general patient information:**

1. With a new or existing patient record open, access the **Patient** page. The quickest way to do this is to click the link for patient's name at the top of the panel.

   The **Patient** page opens with the **Patient** tab active in read-only mode.

2. When the patient's record opens, click **Edit** to open the page in edit mode.

3. On the **Patient** tab, enter the patient's contact and general information.

4. Click the **Medical** tab, and then specify any of the related medical information for the patient. If you select any medical issues, such as tobacco or alcohol, you can provide more detailed information in the corresponding fields.

5. Click the **Emergency** tab if there is an emergency contact for the patient, and provide any available information for the contact. If you specify an emergency contact, be sure to select the contact's relationship to the patient in the **Relation** box.

6. Click the **Caregiver** tab if there is a caregiver for the patient, and provide any available information for the contact. If you specify a caregiver, be sure to select the caregiver's relationship to the patient in the **Relation** box.

7. Click **Save**.

4. Insurance

This chapter discusses insurance and how it is applied to patient records. It also provides procedures for creating and maintaining insurance records.

Overview of Insurance

Once a patient is set up in PharmForce, you can add insurance to their patient record so that you can apply that insurance for the patient's ordered treatment.

There are two levels at which you specify insurance and payer information:

- At the patient level, you enter the patient's insurance information to have on file for any activity regarding the patient. When you specify insurance at this level, the insurance is not used for anything other than to have payers available in the patient's records.

- At the episode level, you assign payers and obtain authorization for the pre-orders you specify for that episode. You must already have insurance information specified at the patient level. Then, at the episode level, you can select the appropriate patient insurance to use for the pre-order.

Primary, Secondary, and Tertiary Payers

When assigning insurance for payment of specific therapies (assigning payers to episode pre-orders), you can assign three levels of payers:

- **Primary:** The primary payer is the majority insurance or self payer that is used for a specific treatment. The primary payer covers the majority of the associated treatment. If the patient has no insurance, then the patient is the primary payer.

- **Secondary:** The secondary payer is the supplemental insurance or self payer that is used to pay part of the remaining balance after the primary payer. If the patient has only one insurance (the primary payer), then the patient is the secondary payer.

- **Tertiary:** The tertiary payer is the supplemental insurance or self payer that is used to pay part of the remaining balance after the primary and secondary payers. If the patient has no more than two insurance plans (the primary and secondary payers), then the patient is the tertiary payer.

In PharmForce you can apply different sets of primary, secondary, and tertiary (PST) payers depending on which pre-orders each of the payers cover. For this reason, you do not assign the primary, secondary, and tertiary payers directly to the patient. Instead you assign the appropriate combination of payers to specific pre-orders.

Adding Insurance to a Patient's Record

You can add one or more insurance plans to a patient so that they are available when you assign payers to pre-orders.

➢ **To add insurance to a patient's record:**

1. With a new or existing patient record open, click the **Ins** menu at the top of the active panel.

   The **Ins** panel opens, showing you any insurance that may already exist for the patient.

2. Click **New Insurance**.

   The **Insurance** page opens.

3. Specify the payer for the insurance:

   a. Click the **Payer** lookup icon.

   b. When the lookup window opens, enter as much information as you have to find the payer, and then click **Search**.

   c. Locate the payer in the search results and click its link.

      The lookup window closes, and the selected payer is automatically added to the **Payer** box.

   To save an insurance record, you must provide at least the payer.

4. Enter any remaining insurance information you have in the **Policy Information** and **Subscriber Information** sections.

> 💬 **Tip:** You can select a default primary, secondary, or tertiary setting in the **Default PST Position** box. If you select a default value here, the insurance will automatically be set by default as the selected PST payer when you assign payers to episode pre-orders. You will still be able to change the PST order of the insurance at the pre-order level as needed.

5. Click **Save & New** if you have another insurance plan to add for the patient, or click **Save** if this is the only insurance.

Editing a Patient's Insurance

If a patient's existing insurance plan changes, you can edit its information.

➢ **To edit insurance information in a patient's record:**

1. With a new or existing patient record open, click the **Ins** menu at the top of the active panel.

   The **Ins** panel opens, showing you any insurance that may already exist for the patient.

2. Click the link in the **Ins** panel for the insurance you want to edit.

3. When the insurance record opens, click **Edit** to open the page in edit mode.

4. Make any edits in the **Policy Information** and **Subscriber Information** sections. To save an insurance record, you must provide at least the payer.

5. Click **Save**.

Creating an Eligibility

As you obtain and verify the patient's insurance information and determine coverage and eligibility for their therapy, you will enter that information as an eligibility.

There are three types of eligibilities depending on the type of insurance you have specified for the patient:

- Commercial

- Medicaid

- Medicare

When you create an eligibility, the type is automatically selected based on the selected insurance. The eligibility form is specific to the corresponding type.

➢ **To create an eligibility:**

1. With a new or existing insurance record open in view mode (if you have the insurance record open in edit mode, you can either save the record or cancel to exit back to view mode), click **New Eligibility**.

2. When the eligibility form opens, enter the eligibility information for the patient. The specific information depends on whether the eligibility is for commercial insurance, Medicaid, or Medicare.

3. Click **Save**.

➢ **To edit an existing eligibility:**

1. With the patient record open, click the **Elig** menu at the top of the active panel.

   The **Eligibility** panel opens, showing you any eligibilities that may already exist for the patient.

2. Click the link in the **Eligibility** panel for the eligibility you want to edit.

3. When the eligibility opens, click **Edit** to open the page in edit mode.

4. Make any edits to the eligibility. The specific information depends on whether the eligibility is for commercial insurance, Medicaid, or Medicare.

5. Click **Save**.

5. Episodes

This chapter discusses episodes and the components that make up an episode. It also provides procedures for creating and maintaining episodes and episode components.

Overview of Episodes

An episode in PharmForce is the complete set of therapy information, based on a specific referral, that you enter for the patient as part of the intake process. For example, if you are performing an intake for a patient who is about to undergo therapy, you would create or access the patient record and then set up their therapy information as an episode under that patient.

An episode includes many components that collectively provide all of the information required to set up the patient for their therapy. These components include:

- General episode information such as the episode description, patient medical history, and lab information

- Pre-orders for pharmacy, nursing, equipment, and supplies (pre-orders are discussed in the chapter *Pre-Orders*, which starts on page 29)

- Authorizations

- Episode status

- Billing admission notes

- Documents

- Occurrence codes

- Financial obligations (FOBs)

Entering General Episode Information

General episode information includes summary information about the episode. For example, the general episode information includes an episode description, which provides a way to specify the general therapy being set up for the patient. This description makes a good reference to help define specific episode pre-orders that support the ordered therapy.

The general episode information also includes such information as hospital admission details, the patient's medical history and lab history, and referral contact.

Working with episode information is a dynamic process. That is, you might create the initial episode record, save the information, and then return at a later time to enter more information.

The instructions here assume you have already accessed the corresponding patient's record in PharmForce (refer to *Searching for and Accessing an Existing Patient* on page 15).

➢ **To add a new episode for a patient:**

1. With the patient record open, click the **Episode** menu at the top of the active panel.

   The **Episode** panel opens, showing you any episodes that may already exist for the patient.

2. If the episode does not already exist in the panel, click **New Episode**.

   The **Episode** page opens for entering of general episode information.

3. Enter the general episode information. To save an episode, you must provide at least the episode description, referral contact, and pharmacy office location.

4. Click **Save**.

➢ **To edit general information for an existing episode:**

1. With the patient record open, click the **Episode** menu at the top of the active panel.

   The **Episode** panel opens, showing you any episodes that may already exist for the patient.

2. Click the link in the panel for the episode you want to access.

3. When the episode record opens, click **Edit** to open the page in edit mode.

4. Make any edits to the general episode information.

5. Click **Save**.

Adding Documents to an Episode

Documents at the episode level are similar to documents at the patient level, with the exception of how they are stored in the PharmForce system. When you add a document at the episode level, you can only access those document records when that episode is selected.

There are two ways to enter documents for an episode:

- Add documents individually.

- Add multiple documents at the same time.

When you add documents individually, you can enter all of the document information (such as send and receive dates or descriptions) at the same time. When you add multiple documents at the same time, you select all of the documents you want to include at the same time and can then go back and enter specific information for each one individually.

➢ **To add an episode document individually:**

1. With the patient record open, click the **Episode** menu at the top of the active panel.

    The **Episode** panel opens, showing you any episodes that may already exist for the patient.

2. Click the link in the panel for the episode you want to access.

3. When the episode record is active, click the **Doc** menu at the top of the active panel.

    The **Document** panel opens, showing you any documents that may already exist for the episode.

4. If the document does not already exist in the panel, click **New Document**.

    The **Document** page opens for entering document information.

5. Enter the document information. To save a document record, you must provide at least the intake document name.

6. Click **Save & New** if you want to add another document record, or click **Save** if this is the only document.

➢ **To add multiple documents in an episode at the same time:**

1. With the patient record open, click the **Episode** menu at the top of the active panel.

   The **Episode** panel opens, showing you any episodes that may already exist for the patient.

2. Click the link in the panel for the episode you want to access.

3. When the episode record is active, click the **Doc** menu at the top of the active panel.

   The **Document** panel opens, showing you any documents that may already exist for the episode.

4. Click **Multi-Select Documents**.

   The **Intake Documents** page opens for selecting the appropriate documents.

5. Select all of the documents that you want to create and then click **Add**.

   Records for each of the documents are added for the patient. You can go back and edit each document individually.

➢ **To edit an episode document:**

1. With the patient record open, click the **Episode** menu at the top of the active panel.

   The **Episode** panel opens, showing you any episodes that may already exist for the patient.

2. Click the link in the panel for the episode you want to access.

3. When the episode record is active, click the **Doc** menu at the top of the active panel.

   The **Document** panel opens, showing you any documents that may already exist for the episode.

4. Click the link in the panel for the document you want to edit.

5. When the document record opens, click **Edit** to open the page in edit mode.

6. Make any edits to the document. To save a document record, you must provide at least the intake document name.

7. Click **Save**.

Updating Episode Status

A new episode's status is pending by default. You can update this status as needed as you progress with the episode.

➢ **To update the episode status:**

1. With the patient record open, click the **Episode** menu at the top of the active panel.

   The **Episode** panel opens, showing you any episodes that may already exist for the patient.

2. Click the link in the panel for the episode you want to access.

3. When the episode record is active, click **Update Status**.

   The **Episode Status** page opens.

4. Select the new status and specify the update date (optional).

5. Click **Save**.

Generating the FOB

When all necessary items have been provided for the patient and episode, you can generate the FOB to review with the patient for their approval and then send for their signature.

➢ **To generate the FOB:**

1. With the patient record open, click the **Episode** menu at the top of the active panel.

   The **Episode** panel opens, showing you any episodes that may already exist for the patient.

2. Click the link in the panel for the episode you want to access.

3. When the episode record is active, click **FOB**.

   The **FOB** page opens.

4. Review the FOB with the patient.

5. To add information about your discussion with the patient, click **Edit**. You can then add the information to the FOB and click **Save**.

6. Pre-Orders

This chapter discusses pre-orders and information required to enter pre-orders. It also provides procedures for creating and editing pre-orders and their required information.

Overview of Pre-Orders

You can create the following types of pre-orders for an episode in PharmForce:

- Pharmacy (RX)

- Nursing (RN)

- Durable medical equipment (DME)

- Supplies

You can enter as many pre-orders as needed to make up the complete ordered therapy specified in the episode. Each pre-order gets entered as its own item and pre-order type.

Process for Creating Pre-Orders

Regardless of the pre-order type (pharmacy, nurse, equipment, or supplies), the process to complete a pre-order includes several steps:

1. Create the pre-order record, which includes adding general information for the initial pre-order detail.

2. Create additional details as needed for any pre-order.

3. Enter PST information for all pre-order details.

4. Create a new authorization or link an existing one to all of the pre-order details.

5. Enter diagnosis information for all pre-order details.

Creating a Pre-Order Record

The pre-order record contains the basic information for the pre-order and its initial detail (excluding PST, diagnosis information, and authorizations, which are all additional tasks). The steps for creating a pre-order record are similar regardless of the pre-order type (pharmacy, nurse, equipment, or supplies).

➢ **To create a pre-order record:**

1. With the patient record open, click the **Episode** menu at the top of the active panel.

   The **Episode** panel opens, showing you any episodes that may already exist for the selected patient.

2. Click the link in the **Episode** panel for the episode you want to access.

   The selected episode record opens in the **Episode** panel, with new menu items available at the top of the panel for managing pre-orders.

3. Click the corresponding menu for the pre-order type you want to create:

   – For pharmacy pre-orders click the **RX** menu.

   – For nurse pre-orders click the **RN** menu.

   – For equipment pre-orders click the **DME** menu.

   – For supply pre-orders click the **Supply** menu.

   The corresponding pre-order panel opens, showing you any pre-orders that may already exist for the selected episode.

4. Click the corresponding new pre-order button:

   – For pharmacy pre-orders, click **New RX Pre-Order**.

   – For nurse pre-orders, click **New Nurse Pre-Order**.

   – For equipment pre-orders, click **New DME Pre-Order**.

   – For supply pre-orders, click **New Supply Pre-Order**.

   The pre-order page opens for entering the corresponding pre-order information, including the initial pre-order detail.

5. Enter the pre-order information. To save a pre-order, you must provide at least the information for any fields flagged with a red marker.

6. Click **Save**.

   The pre-order page refreshes in view mode with the new pre-order information. At the bottom of the page is the details panel, showing you the initial detail that was created with the pre-order.

7. Create additional details, assign PST payers, and add diagnoses as needed. Procedures for these tasks are provided in this chapter.

➢ **To add a pharmacy pre-order:**

1. With the patient record open, clickr the **Episode** menu at the top of the active panel.

   The **Episode** panel opens, showing you any episodes that may already exist for the patient.

2. Click the link in the panel for the episode you want to access.

3. When the episode record is active, click the **RX** menu at the top of the active panel.

   The **RX Pre-Order** panel opens, showing you any pharmacy pre-orders that may already exist for the selected episode.

4. If the pre-order does not already exist in the panel, click **New RX Pre-Order**.

   The **RX Pre-Order** page opens for entering the pharmacy pre-order information.

5. Enter the pre-order information. To save a pharmacy pre-order, you must provide at least:

   – Number of days the patient will be on service

   – Start of care date of the pharmacy order

   – Ordered drug

   – Frequency of the drug in the pharmacy order

6. Click **Save**.

   The **RX Pre-Order** page refreshes in view mode with the new pre-order information.

7. In the **RX Pre-Order Details** panel, click the link for the pre-order detail you created with the pre-order.

   The **RX Pre-Order Details** page opens.

8. Click **Assign PST**.

   The **Patient PST** page opens.

9. If you do not see you exact PST order in the list of available PSTs, then you must create a new PST order:

   a. Click **New PST**.

   b. When the **PST Detail** page opens, select each of the payers in the **Primary**, **Secondary**, and **Tertiary** boxes in the PST order you want for the pre-order detail.

   c. Select **Bill for Denial** if you plan to submit the pre-order with the intent of it being denied by the payer.

   d. Click **Save**.

      The **Patient PST** page opens with the new PST order.

10. On the **Patient PST** page, find the PST order you want to use and click its corresponding **Assign** link.

    The **RX Pre-Order Details** page opens in view mode with your selected PST information.

11. In the **Pre-Order Dx** panel on the **RX Pre-Order Details** page, click **Add/Modify Pre-Order Dx**. to add diagnoses for the selected pre-order detail.

    The **Dx** page opens with two selection boxes. The selection box on the left (**Available Patient Diagnoses**) contains the list of diagnoses that have been selected for the current patient. If no diagnoses have been selected for the patient, then none appear in this box. You can add a diagnosis for the patient by clicking **Add Patient Dx** (refer to *Entering Patient Diagnoses* on page 45). Adding a diagnosis for a patient is different from adding a

diagnosis for a pre-order detail. Pre-order diagnoses may be only a subset of the diagnoses selected for the patient. They are the diagnoses that apply to the specific pre-order detail.

The box on the right (**Selected Patient Diagnoses**) will contain the diagnoses you select for the current pre-order detail.

12. In the **Available Patient Diagnoses** box, click to select a patient diagnosis that you want to add for the pre-order detail.

13. With a diagnosis selected in the **Available Patient Diagnoses** box, click the right arrow to the right of the box.

   The diagnosis is added to the **Selected Patient Diagnoses** box, indicating that the diagnosis will be assigned to the pre-order detail when saved.

14. Repeat the previous two steps for every diagnosis you want to apply to the pre-order detail.

15. Click **Save**.

   The **RX Pre-Order Details** page opens in view mode with your selected diagnoses information.

16. At this point, all of your pre-order information is saved. You can return to the main **RX Pre-Order** page by clicking **Return to Pre-Order**.

➢ **To edit a pharmacy pre-order:**

1. With the patient record open, click the **Episode** menu at the top of the active panel.

   The **Episode** panel opens, showing you any episodes that may already exist for the patient.

2. Click the link in the panel for the episode you want to access.

3. When the episode record is active, click the **RX** menu at the top of the active panel.

   The **RX Pre-Order** panel opens, showing you any pharmacy pre-orders that may already exist for the selected episode.

4. Click the link in the panel for the pre-order you want to edit.

5. When the pre-order record opens, click **Edit** in the **RX Pre-Order** panel to open the page in edit mode.

6. Make any edits to the pharmacy pre-order. To save a pharmacy pre-order, you must provide at least the number of days the patient will be on service and the start of care date.

7. Click **Save**.

8. To edit a pharmacy pre-order details record for the selected pre-order:

   a. Click the link for the details record in the **RX Pre-Order Details** panel.

   b. When the pre-order details record opens, click **Edit** to open the page in edit mode.

   c. Make any edits to the pre-order details. To save a pharmacy pre-order details record, you must provide at least the drug and frequency of use.

   d. Click **Save**.

➢ **To add a nurse pre-order:**

   1. With the patient record open, click the **Episode** menu at the top of the active panel.

      The **Episode** panel opens, showing you any episodes that may already exist for the patient.

   2. Click the link in the panel for the episode you want to access.

   3. When the episode record is active, click the **RN** menu at the top of the active panel.

      The **Nurse Pre-Order** panel opens, showing you any nurse pre-orders that may already exist for the selected episode.

   4. If the pre-order does not already exist in the panel, click **New Nurse Pre-Order**.

      The **Nurse Pre-Order** page opens for entering the pre-order information.

5. Enter the pre-order information. To save a nurse pre-order, you must provide at least:

    –   Nursing agency

    –   Procedure code

    –   Number of nursing visits/units

6. Click **Save**.

    The **Nurse Pre-Order** page refreshes in view mode with the new pre-order information.

7. In the **Nurse Pre-Order Details** panel, click the link for the pre-order detail you created with the pre-order.

    The **Nurse Pre-Order Details** page opens.

8. Click **Assign PST**.

    The **Patient PST** page opens.

9. If you do not see you exact PST order in the list of available PSTs, then you must create a new PST order:

    e. Click **New PST**.

    f. When the **PST Detail** page opens, select each of the payers in the **Primary**, **Secondary**, and **Tertiary** boxes in the PST order you want for the pre-order detail.

    g. Select **Bill for Denial** if you plan to submit the pre-order with the intent of it being denied by the payer.

    h. Click **Save**.

        The **Patient PST** page opens with the new PST order.

10. On the **Patient PST** page, find the PST order you want to use and click its corresponding **Assign** link.

    The **RX Pre-Order Details** page opens in view mode with your selected PST information.

11. In the **Pre-Order Dx** panel on the **RX Pre-Order Details** page, click **Add/Modify Pre-Order Dx**. to add diagnoses for the selected pre-order detail.

    The **Dx** page opens with two selection boxes. The selection box on the left (**Available Patient Diagnoses**) contains the list of diagnoses that have been selected for the current patient. If no diagnoses have been selected for the patient, then none appear in this box. You can add a diagnosis for the patient by clicking **Add Patient Dx** (refer to *Entering Patient Diagnoses* on page 45). Adding a diagnosis for a patient is different from adding a diagnosis for a pre-order detail. Pre-order diagnoses may be only a subset of the diagnoses selected for the patient. They are the diagnoses that apply to the specific pre-order detail.

    The box on the right (**Selected Patient Diagnoses**) will contain the diagnoses you select for the current pre-order detail.

12. In the **Available Patient Diagnoses** box, click to select a patient diagnosis that you want to add for the pre-order detail.

13. With a diagnosis selected in the **Available Patient Diagnoses** box, click the right arrow to the right of the box.

    The diagnosis is added to the **Selected Patient Diagnoses** box, indicating that the diagnosis will be assigned to the pre-order detail when saved.

14. Repeat the previous two steps for every diagnosis you want to apply to the pre-order detail.

15. Click **Save**.

    The **RX Pre-Order Details** page opens in view mode with your selected diagnoses information.

16. At this point, all of your pre-order information is saved. You can return to the main **RX Pre-Order** page by clicking **Return to Pre-Order**.

➢ **To edit a nurse pre-order:**

1. With the patient record open, click the **Episode** menu at the top of the active panel.

    The **Episode** panel opens, showing you any episodes that may already exist for the patient.

2. Click the link in the panel for the episode you want to access.

3. When the episode record is active, click the **RN** menu at the top of the active panel.

   The **Nurse Pre-Order** panel opens, showing you any nurse pre-orders that may already exist for the selected episode.

4. Click the link in the panel for the pre-order you want to edit.

5. When the pre-order record opens, click **Edit** in the **Nurse Pre-Order** panel to open the page in edit mode.

6. Make any edits to the pre-order. To save a nurse pre-order, you must provide at least the nursing agency.

7. Click **Save**.

8. To edit a pre-order details record for the selected pre-order:

   a. Click the link for the details record in the **Nurse Pre-Order Details** panel.

   b. When the pre-order details record opens, click **Edit** to open the page in edit mode.

   c. Make any edits to the pre-order details. To save a nurse pre-order details record, you must provide both the procedure code and number of visits/units.

   d. Click **Save**.

➢ **To add an equipment pre-order:**

1. With the patient record open, click the **Episode** menu at the top of the active panel.

   The **Episode** panel opens, showing you any episodes that may already exist for the patient.

2. Click the link in the panel for the episode you want to access.

3. When the episode record is active, click the **DME** menu at the top of the active panel.

   The **DME Pre-Order** panel opens, showing you any equipment pre-orders that may already exist for the selected episode.

4. If the pre-order does not already exist in the panel, click **New DME Pre-Order**.

   The **DME Pre-Order** page opens for entering the pre-order information.

5. Enter the pre-order information. To save an equipment pre-order, you must provide at least the description of the equipment and the DME item.

6. Click **Save**.

➢ **To edit an equipment pre-order:**

1. With the patient record open, click the **Episode** menu at the top of the active panel.

   The **Episode** panel opens, showing you any episodes that may already exist for the patient.

2. Click the link in the panel for the episode you want to access.

3. When the episode record is active, click the **DME** menu at the top of the active panel.

   The **DME Pre-Order** panel appears, showing you any equipment pre-orders that may already exist for the selected episode.

4. Click the link in the panel for the pre-order you want to edit.

5. When the pre-order record opens, click **Edit** in the **DME Pre-Order** panel to open the page in edit mode.

6. Make any edits to the pre-order. To save an equipment pre-order, you must provide at least a description of the equipment.

7. Click **Save**.

8. To edit a pre-order details record for the selected pre-order:

   a. Click the link for the details record in the **DME Pre-Order Details** panel.

   b. When the pre-order details record opens, click **Edit** to open the page in edit mode.

   c. Make any edits to the pre-order details. To save an equipment pre-order details record, you must provide at least the DME item.

d. Click **Save**.

➢ **To add a supply pre-order:**

1. With the patient record open, click the **Episode** menu at the top of the active panel.

    The **Episode** panel opens, showing you any episodes that may already exist for the patient.

2. Click the link in the panel for the episode you want to access.

3. When the episode record is active, click the **Supply** menu at the top of the active panel.

    The **Supply Pre-Order** panel appears, showing you any supply pre-orders that may already exist for the selected episode.

4. If the pre-order does not already exist in the panel, click **New Supply Pre-Order**.

    The **Supply Pre-Order** page opens for entering the pre-order information.

5. Enter the pre-order information. To save a supply pre-order, you must provide at least the description and supply item.

6. Click **Save**.

➢ **To edit a supply pre-order:**

1. With the patient record open, click the **Episode** menu at the top of the active panel.

    The **Episode** panel opens, showing you any episodes that may already exist for the patient.

2. Click the link in the panel for the episode you want to access.

3. When the episode record is active, click the **Supply** menu at the top of the active panel.

    The **Supply Pre-Order** panel opens, showing you any supply pre-orders that may already exist for the selected episode.

4. Click the link in the panel for the pre-order you want to edit.

5. When the pre-order record opens, click **Edit** in the **Supply Pre-Order** panel to open the page in edit mode.

6. Make any edits to the pre-order. To save a supply pre-order, you must provide at least a description.

7. Click **Save**.

8. To edit a pre-order details record for the selected pre-order:

   a. Click the link for the details record in the **Supply Pre-Order Details** panel.

   b. When the pre-order details record opens, click **Edit** to open the page in edit mode.

   c. Make any edits to the pre-order details. To save a supply pre-order details record, you must provide at least the supply item.

   d. Click **Save**.

Entering an Authorization

A link to an authorization page automatically becomes available in the **Authorizations** panel of the episode page after you have created one or more pre-orders and have assigned payers to those pre-orders. When the authorization page is available, you must open it to enter the authorization information.

➢ **To enter an authorization:**

1. With the patient record open, click the **Episode** menu at the top of the active panel.

   The **Episode** panel opens, showing you any episodes that may already exist for the patient.

2. Click the link in the panel for the episode you want to access.

3. When the episode record is active, make sure there is at least one pre-order specified with the appropriate PST payers.

4. In the **Authorizations** panel at the bottom of the episode page, locate the authorization for the specific payer and click its link.

   The authorization page opens for the payer.

5. Enter the authorization information. To save an authorization, you must provide at least the following information:

    –   Authorization number

    –   From and to dates for the authorization

    –   Authorization amount

    –   Authorization units

    –   Contact name, phone number, and entity of person spoken to for authorization

6. In the pre-order details section(s), select the checkboxes for the pre-order details being authorized.

7. Click **Save**.

7. Other Features

This chapter discusses additional features in PharmForce as they relate to the intake process for patients. It also provides procedures for working with these features.

Overview of Other Features

There are several additional items that you may or may not specify in PharmForce for a patient, including:

- The patient's height and weight

- Drug, food, or other allergies the patient has

- Diagnoses made about the patient

- Physicians caring for the patient

- Alert codes

- The patient's medical profile as it existed in the old PharmWorks system

- Medications the patient is taking

- Documents and notes for processing the patient

Entering Patient Height and Weight

You can add patient height and weight information.

➢ **To add the patient's height and weight:**

1. With the patient record open, click the **Ht & Wt** menu at the top of the active panel.

   The **Ht & Wt** panel opens, showing you any height and weight records that may already exist for the patient.

2. Click **New Ht & Wt**.

   The **Ht & Wt** page opens for entering a height and weight record.

3. Enter the patient's height and weight information.

4. Click **Save & New** if you want to add another height and weight record for the patient, or click **Save** if this is the only record.

> ⓘ **Note:** You cannot edit an existing height and weight record once it is saved.

Entering Allergies for a Patient

You can add drug, food, or other allergies or edit existing ones for the patient.

➢ **To add an allergy:**

1. With the patient record open, click the **Allergy** menu at the top of the active panel.

   The **Allergy** panel opens, showing you any allergies that may already exist for the patient.

2. If the allergy does not already exist in the panel, click **New Allergy**.

   The **Allergy** page opens for entering of general episode information.

3. Specify the patient's medical allergy:

   a. Click the **Allergy** lookup icon.

   b. When the lookup window opens, enter as much information as you have to find the allergy, and then click **Search**.

   c. Locate the allergy in the search results and click its link.

      The lookup window closes, and the selected allergy is automatically added to the **Payer** box.

   To save an allergy record, you must provide at least the allergy.

4. Enter a description if you have one.

5. Click **Save & New** if you want to add another allergy, or click **Save** if this is the only allergy.

➢ **To edit an existing allergy:**

1. With the patient record open, click the **Allergy** menu at the top of the active panel.

    The **Allergy** panel opens, showing you any allergies that may already exist for the patient.

2. Click the link in the panel for the allergy you want to edit.

3. When the allergy record opens, click **Edit** to open the page in edit mode.

4. Make any edits to the allergy. To save an allergy record, you must provide at least the allergy.

5. Click **Save**.

Entering Patient Diagnoses

You can add patient diagnoses or edit existing ones.

➢ **To add a diagnosis:**

1. With the patient record open, click the **Dx** menu at the top of the active panel.

    The **Dx** panel opens, showing you any diagnoses that may already exist for the patient.

2. If the diagnosis does not already exist in the panel, click **New Dx**.

    The **Dx** page opens for entering diagnosis information.

3. Enter the diagnosis information. To save a diagnosis record, you must provide at least the ICD9 code.

4. Click **Save & New** if you want to add another diagnosis, or click **Save** if this is the only diagnosis.

➢ **To edit an existing diagnosis:**

1. With the patient record open, click the **Dx** menu at the top of the active panel.

   The **Dx** panel opens, showing you any diagnoses that may already exist for the patient.

2. Click the link in the panel for the diagnosis you want to edit.

3. When the diagnosis record opens, click **Edit** to open the page in edit mode.

4. Make any edits to the diagnosis. To save a diagnosis record, you must provide at least the ICD9 code.

5. Click **Save**.

Entering Physicians

You can add patient physicians or edit existing ones. The physicians you enter for a patient are used as selections when you specify information for episodes (for example, when selecting a physician associated with an RX pre-order).

➢ **To add a physician:**

1. With the patient record open, click the **Phy** menu at the top of the active panel.

   The **Physician** panel opens, showing you any physicians that may already exist for the patient.

2. If the physician does not already exist in the panel, click **New Physician**.

   The **Physician** page opens for entering physician information.

3. Enter the physician information. To save a physician record, you must provide at least the physician's name.

4. Click **Save & New** if you want to add another physician, or click **Save** if this is the only physician.

➢ **To edit an existing physician:**

1. With the patient record open, click the **Phy** menu at the top of the active panel.

The **Physician** panel opens, showing you any physicians that may already exist for the patient.

2. Click the link in the panel for the physician you want to edit.

3. When the physician record opens, click **Edit** to open the page in edit mode.

4. Make any edits to the physician. To save a physician record, you must provide at least the physician's name.

5. Click **Save**.

Entering Alert Codes

Alert codes are special alerts that you specify for the patient (for example, special allergy information or additional billing information). When you specify an alert code, it appears in the patient header at the top of the panel so that it is easily observable.

➢ **To add an alert code:**

1. With the patient record open, click the **Alert Cd** menu at the top of the active panel.

   The **Alert Codes** panel opens, showing you any alert codes that may already exist for the patient.

2. If the alert code does not already exist in the panel, click **New Alert Code**.

   The **Alert Code** page opens for entering alert code information.

3. Enter the alert code, which is required to save the record.

4. Click **Save & New** if you want to add another alert code, or click **Save** if this is the only alert code.

➢ **To edit an existing alert code:**

1. With the patient record open, click the **Alert Cd** menu at the top of the active panel.

   The **Alert Codes** panel opens, showing you any alert codes that may already exist for the patient.

2. Click the link in the panel for the alert code you want to edit.

3. When the alert code record opens, click **Edit** to open the page in edit mode.

4. Change the alert code to a new code.

5. Click **Save**.

Entering Patient Documents

Documents at the patient level are similar to documents at the episode level, with the exception of how they are stored in the PharmForce system. When you add a document at the patient level, you can only access those document records while at the patient level (as opposed to when an episode is open for the patient).

There are two ways to enter documents for a patient:

- Add documents individually.

- Add multiple documents at the same time.

When you add documents individually, you can enter all of the document information (such as send and receive dates or descriptions) at the same time. When you add multiple documents at the same time, you select all of the documents you want to include at the same time and can then go back and enter specific information for each one individually.

➢ **To add a patient document individually:**

1. With the patient record open, click the **Doc** menu at the top of the active panel.

    The **Document** panel opens, showing you any documents that may already exist for the patient.

2. If the document does not already exist in the panel, click **New Document**.

    The **Document** page opens for entering document information.

3. Enter the document information. To save a document record, you must provide at least the intake document name.

4. Click **Save & New** if you want to add another document record, or click **Save** if this is the only document.

➢ **To add multiple documents for a patient at the same time:**

1. With the patient record open, click the **Doc** menu at the top of the active panel.

   The **Document** panel opens, showing you any documents that may already exist for the patient.

2. Click **Multi-Select Documents**.

   The **Intake Documents** page opens for selecting the appropriate documents.

3. Select all of the documents that you want to create and then click **Add**.

   Records for each of the documents are added for the patient. You can go back and edit each document individually.

➢ **To edit a patient document:**

1. With the patient record open, click the **Doc** menu at the top of the active panel.

   The **Document** panel opens, showing you any documents that may already exist for the patient.

2. Click the link in the panel for the document you want to edit.

3. When the document record opens, click **Edit** to open the page in edit mode.

4. Make any edits to the document. To save a document record, you must provide at least the intake document name.

5. Click **Save**.

Entering Patient Notes

You can add notes about the patient and assign other users and dates for follow-up with the patient. Once a note is entered, you can add linked notes that are related to the initial note. This feature allows users to add comments to existing notes.

➢ **To add a patient note:**

1. With the patient record open, click the **Note** menu at the top of the active panel.

    The **Patient Note** panel opens, showing you any notes that may already exist for the patient.

2. Click **New Patient Note**.

    The **Patient Note** page opens for entering general information.

3. Enter the appropriate information. To save a patient note, you must provide at least a comment. Once the note is saved, this comment cannot be edited. However, you can edit the follow-up user and follow-up date.

4. Click **Save**.

➢ **To edit an existing patient note:**

1. With the patient record open, click the **Note** menu at the top of the active panel.

    The **Patient Note** panel opens, showing you any notes that may already exist for the patient.

2. Click the link in the panel for the note you want to edit.

3. When the note opens, click **Edit** to open the page in edit mode.

4. You can edit the follow-up user and date, but you cannot edit the comment.

5. Click **Save**.

➢ **To add a linked note to an existing note:**

1. With the patient record open, click the **Note** menu at the top of the active panel.

    The **Patient Note** panel opens, showing you any notes that may already exist for the patient.

2. Click the link in the panel for the note to which you want to add a linked note.

3. When the note opens, click **New Linked Note**.

    The **Linked Patient Note** page opens for entering general information.

4. Enter the appropriate information. To save a linked patient note, you must provide at least a comment. Once the linked note is saved, this comment cannot be edited. However, you can edit the follow-up user and follow-up date.

5. Click **Save**.

➢ **To edit an existing linked patient note:**

1. With the patient record open, click the **Note** menu at the top of the active panel.

    The **Patient Note** panel opens, showing you any notes that may already exist for the patient.

2. Click the link in the panel for the parent note for the linked note you want to edit.

3. When the note opens, find the linked note you want to edit in the **Linked Patient Note** panel, and click its corresponding link.

    The linked note expands in the **Linked Patient Note** panel.

4. Click **Edit** in the **Linked Patient Note** panel.

    The **Linked Patient Note** page opens with the selected linked note.

5. You can edit the follow-up user and date, but you cannot edit the comment.

6. Click **Save**.

8. Intake Reports

This chapter discusses the different reports that are available through the intake module and provides procedures for accessing these reports.

Overview of Intake Reports

There are several reports you can access to view information about patients and the intake process. These reports are viewed through Crystal Reports, which is opened automatically when you access the report through PharmForce (you do not have to follow any separate procedures for Crystal Reports).

Accessing an Intake Report

You access intake reports from the intake module.

➢ **To access an intake report:**

1. When logged in to the PharmForce intake module (refer to *Logging in to PharmForce*, on page 2), click **Reports** at the top of the page.

   The **Reports** page opens.

2. Click the link for the specific report you want to open.

   The report opens in Crystal Reports.