CalMHSA RX

County of San Diego
Behavioral Health Services

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This handout contains EXCERPTS and SCREEN SHOTS of confidential and proprietary information for view only. It shall not be copied or shared for anything other than its intended purpose as a training resource for the electronic health record for the County of San Diego, Behavioral Health Services.

CONFIDENTIALITY

HIPAA regulations mandate that all client information be treated confidentially.

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

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

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

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

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

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

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



DEFINITIONS

- **CalMHSA Rx:** The desktop e-prescribing platform of DrFirst's Rcopia. CalMHSA Rx uses the SureScripts Provider portal in completing the electronic prescription process
- **Enter Details:** The screen where components of the prescription are entered, including the Sig
- **Electronic prescription:** A prescription sent directly to a pharmacy through SureScripts
- **EPCS:** Electronic Prescribing of Controlled Substances
- **Favorite Prescription:** A medication that you routinely prescribe for your clients
- **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 client'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 client's health plan. A drug can have formulary or non-formulary status, or preferred status, such as P1, P2, etc.
- **IDP:** Identity Proofing Process
- **LAC:** Logical Access Control
- **Medication:** A drug that the client is already taking
- **Medical History:** A list of medications that the client has taken in the past; this information may be obtained from the client's health plan or pharmacy
- **OTP:** One Time Passcode
- **Patient:** A client admitted to a County Behavioral Health Services contracted

program

- **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
- **Prescription Benefit:** This determines whether the client has a prescription drug benefit
- **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
- **Sig:** Instructions for the client on how to use or take his or her prescription, including amount and frequency
- **TFA:** Two-Factor Authentication

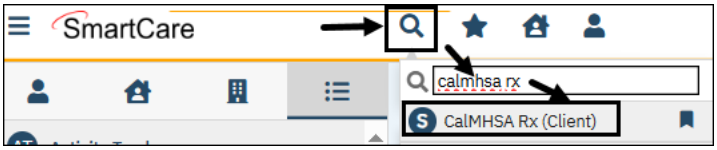
NOTES

CALMHSA RX ACCESS

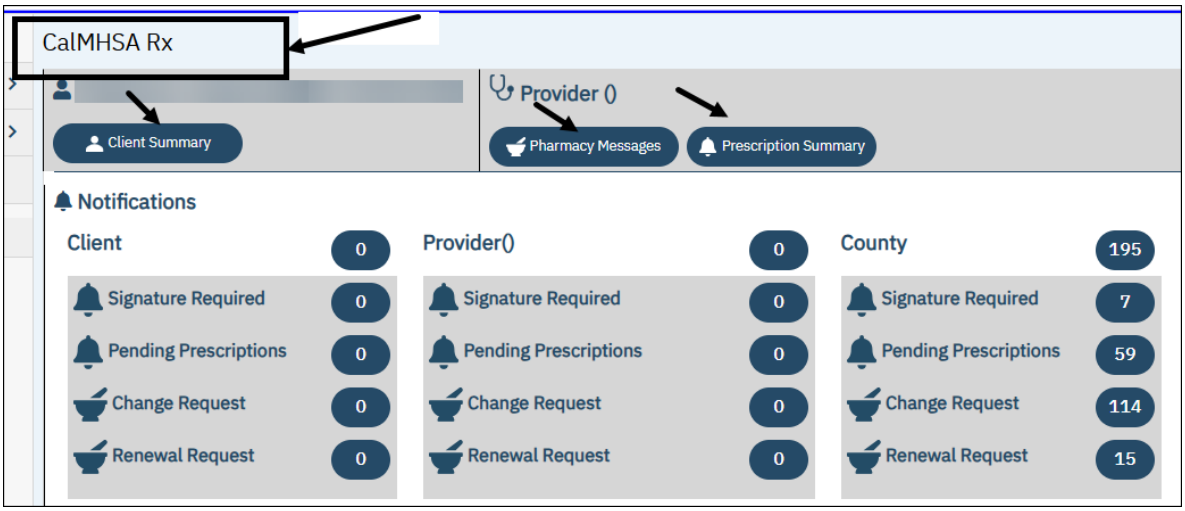
Prescribers and Clinical Support Staff can access CalMHSA Rx by logging into SmartCare and then opening a client by using the **Client Search** button.



After a client is selected, **Search** for **CalMHSA Rx** and select **CalMHSA Rx (Client)**.



The CalMHSA Rx screen launches. Select one of the following action items: **Client Summary**, **Pharmacy Messages**, or **Prescription Summary**.



Client Summary allows you to order medications, review the medications list, and add/review allergies.

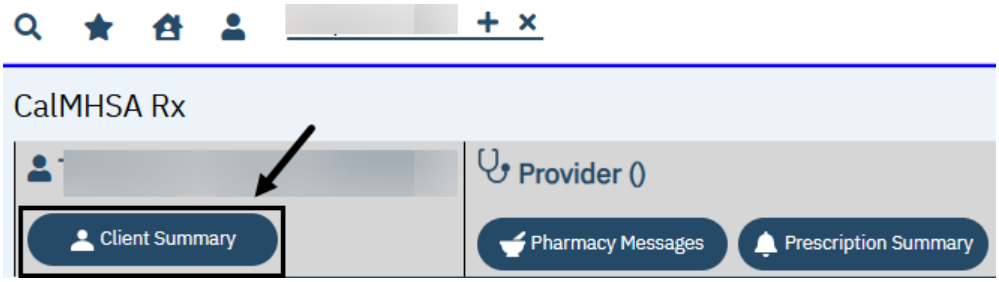
Prescription Summary allows you to review your notifications for missing signatures or pending/queued/undeliverable/canceled prescriptions

Pharmacy Messages allows you to review pharmacy notifications such as prescription renewals/change requests/awaiting/cancellation updates.

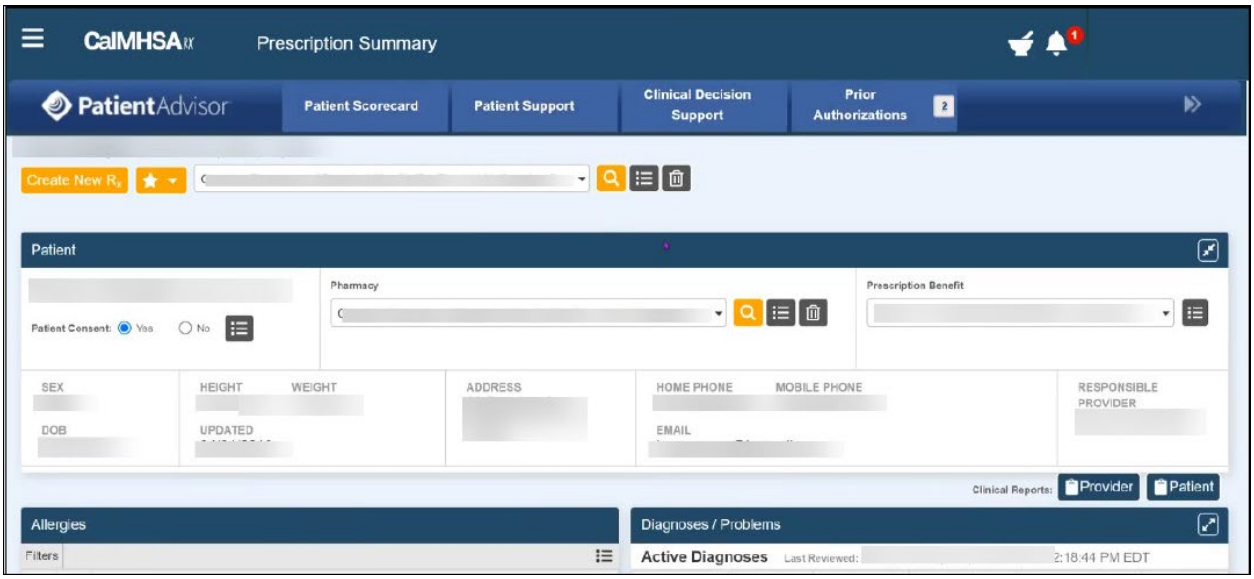
Terms of Use. You will be directed to this page the first time you access CalMHSA Rx. Read the terms and check the box next to the "I Have Read and Understood This Agreement, And I Declare That I Am Authorized To Sign The Agreement" and click **Accept**.

E-PRESCRIBING HOMEPAGE

To launch the CalMHSA Rx E-Prescribing Platform Homepage, click **Client Summary**.



The E-Prescribing Homepage launches. The client's basic information, demographics, medications, allergies, diagnosis, and pending prescriptions can be accessed through this screen.

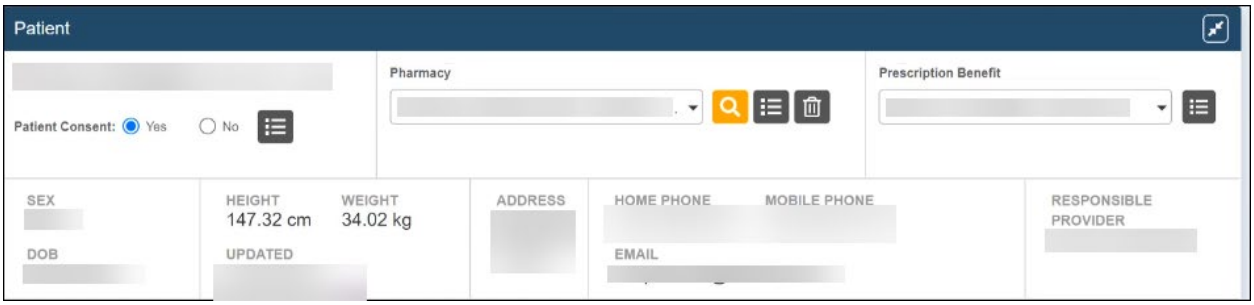


Patient Advisor: The tools to the right will display a quick view of the Patient Scorecard, Patient Support, Clinical Decision Support, and Prior Authorizations.

Create New Rx: To search or write a new prescription, refer to the Creating a New Prescription section of this resource packet.

Pharmacy: To add or change a pharmacy, refer to the Pharmacy Management section of this resource packet.

Patient: This section displays the client's demographic information, such as First Name, Last Name, Sex, DOB, Home Phone, and Address. You cannot edit any of the demographic information in CalMHSA Rx. To update the client information, go back to SmartCare. The edits in SmartCare will then reflect in CalMHSA Rx.



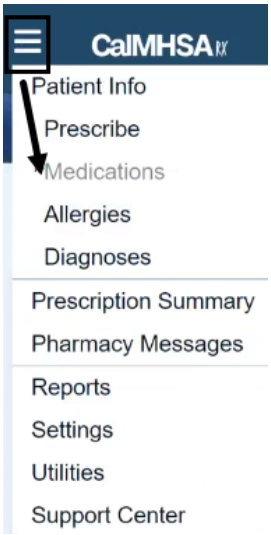
Medications: To add a new medication, start, stop, or renew refer to the Medication Management section of this resource packet.

Allergies: To add an allergy, refer to the Allergy Management section of this resource packet.

Diagnosis/Problems: This section displays the diagnoses and problems lists entered in SmartCare. If nothing is displaying, add a diagnosis or problem list in SmartCare.

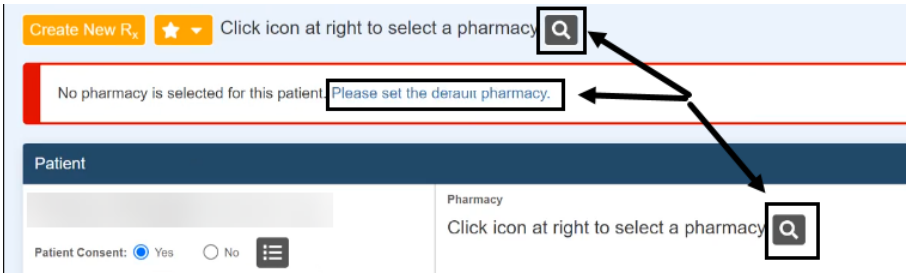
Prescription Management: This section displays any pending prescriptions for a client. To create a new prescription, refer to the **Creating a New Prescription** section of this manual.

Menu: The hamburger menu on the top left of the homepage allows you to toggle quickly between sections.



PHARMACY MANAGEMENT

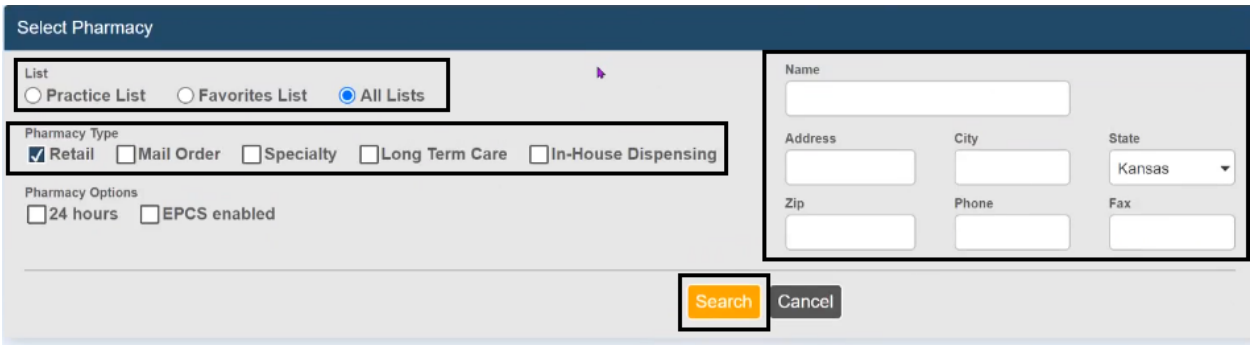
It is best to add a default pharmacy for the client before you begin prescribing. Up to five pharmacies can be saved and can be easily switched. To add a pharmacy, click one of the magnifying glass icons or the link 'Please set the default pharmacy.'



Follow the steps below to add a pharmacy for a client.

1. Search for the pharmacy. There are three lists: Practice List, Favorites List, All Lists.

    a. **Practice List**: Pharmacies located within the first three digits of the program's ZIP Code.
    b. **Favorites List**: Pharmacies that the prescriber has previously added to favorites list.
    c. **All Lists**: contains all available pharmacies in CalMHSA Rx.



2. Select from the list of pharmacies presented based on selected search criteria.



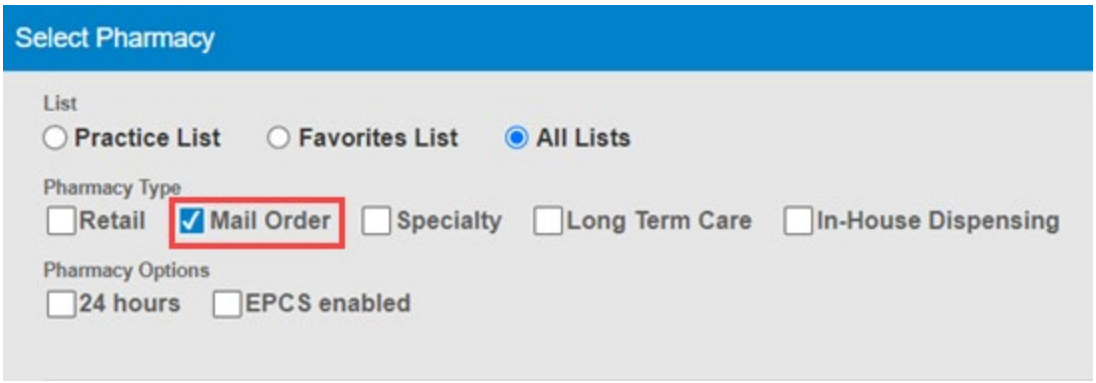
Confirm selection, then click within the row to add the pharmacy to the client's record. If you hover over the type, the system will display what it is.

a. (C) – Pharmacy accepts **controlled** substance prescriptions electronically.
b. (E) – Pharmacy accepts **electronic** prescriptions.
c. (R) – Pharmacy is a **retail** pharmacy.

After adding the desired pharmacy, you will be routed back to the homepage. Up to five pharmacies can be saved and can be retrieved from the **Pharmacy** drop-down menu.



Mail Order Pharmacy: To choose a mail order pharmacy for a client, in the Pharmacy Type, check the Mail Order box. The mail order pharmacy will display on the E-Prescribing Homepage.



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ALLERGY MANAGEMENT

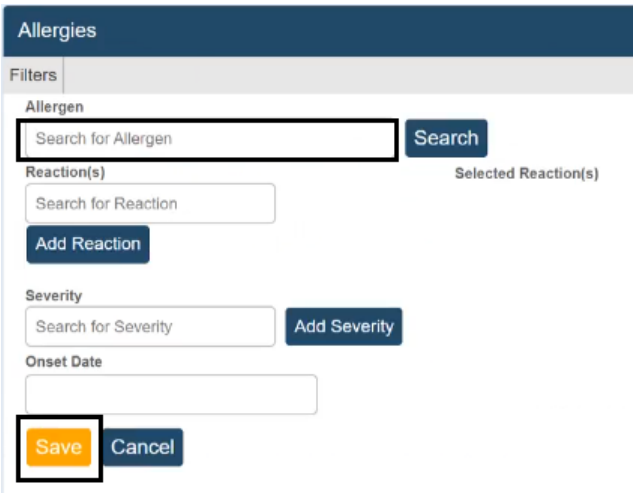
Allergies can be managed within CalMHSA Rx. Allergies can be added with reactions, severities, and onset dates, and are checked for interactions when e-prescribing.

Adding an Allergy:

To search for and record an allergy, click on the + button.



The **Allergies** screen launches. Complete and click **Save**.



Allergen: Search and select the allergy from the list of allergies

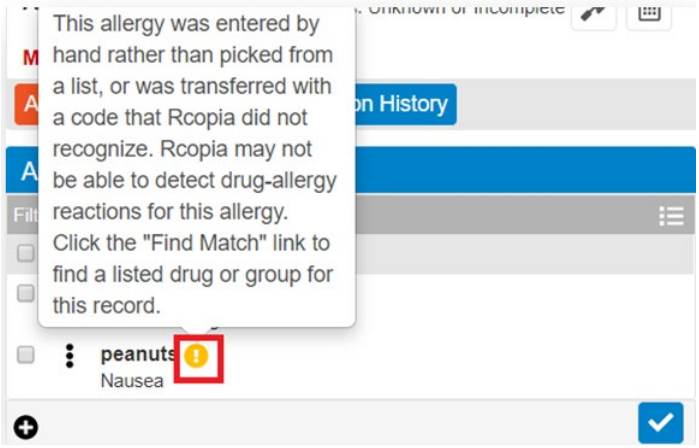
Reaction(s): Select the reaction

Severity: Select the severity

Onset Date: Enter the onset date

Adding an Unlisted Allergy: To add an allergy that is not listed in the Allergies table, enter the name of the allergen and click the **Enter Free Text** link.

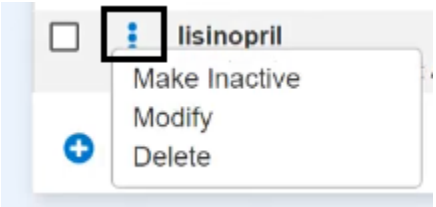
Note: A yellow exclamation mark icon next to an allergy indicates that CalMHSA Rx does not conduct a drug-allergy check because the allergy was entered as free text.



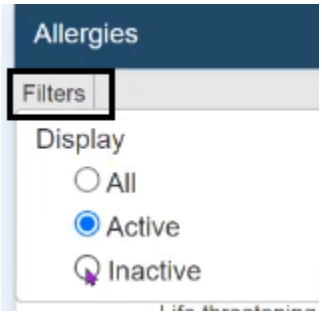
Repeat the previous steps for each allergy. Once all allergies are entered, mark the allergies as reviewed by clicking the check box.



Modifying or Deleting an Allergy: To modify, inactivate, or delete an allergy, hover over the vertical ellipses next to the allergy, and select the appropriate button. To reactivate an inactive allergy, hover over the ellipses as well.



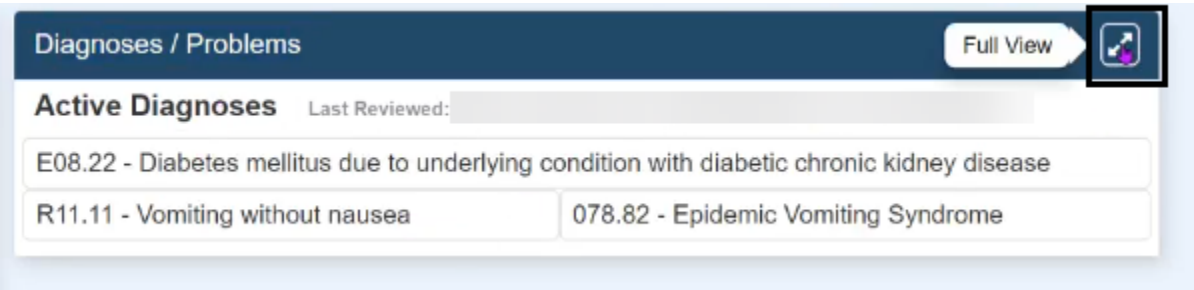
Filters: To view all active and inactive allergies, hover over the filters and select All.



DIAGNOSES/PROBLEMS MANAGEMENT

Entering the diagnoses and/or problems in SmartCare can be beneficial for several reasons, including checking for drug interactions and the ability to easily link a diagnosis to a prescription.

The **Diagnosis/Problems** widget can be found next to the Allergies widget on the E-Prescribing Homepage. Click the Full View icon on the left side of the Diagnoses / Problems widget to view all diagnoses entered in SmartCare.

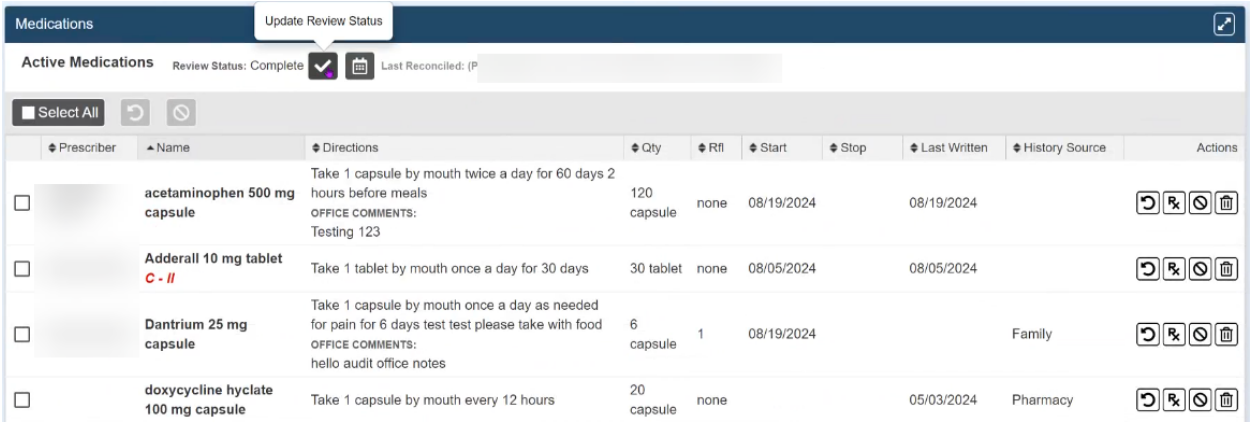


If the client has a known diagnosis but is not displaying in CalMHSA Rx, review if a Diagnosis Document was entered in SmartCare. If a diagnosis was not entered or effective date has expired, create and sign a Diagnosis Document (Client) in SmartCare.

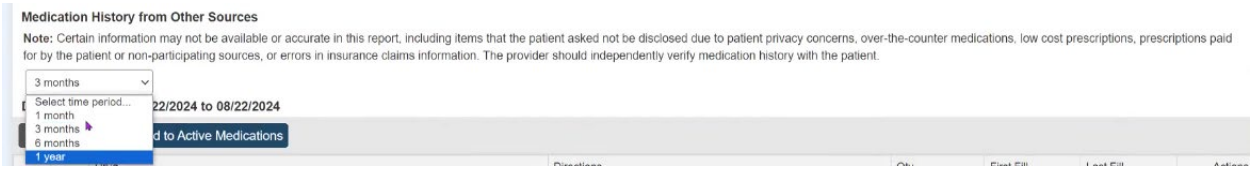
NOTES

MEDICATION MANAGEMENT

The **Medications** widget on the E-Prescribing Homepage lists the client's current active medications, whether they are prescribed by you or another provider within the program.



Medication History: Medication history for up to one year can be obtained from SureScripts.



To pull a client's medication history, click **Show Medication History**.



1. The Medication History screen launches. Use the drop down list to select the period.

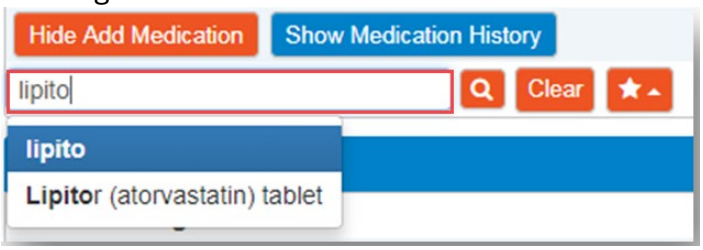


Adding a Medication:

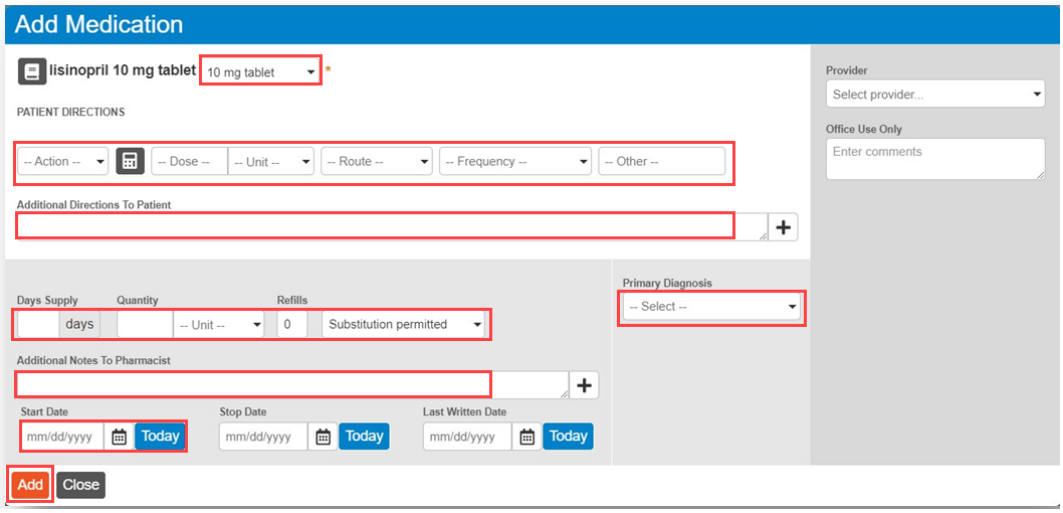
To add a client medication, click **Add Medication**.



Type the drug's name in the Search box and select the appropriate medication from the resulting list, and then select the strength. If you added the drug to your Favorites list, select the drug from there.

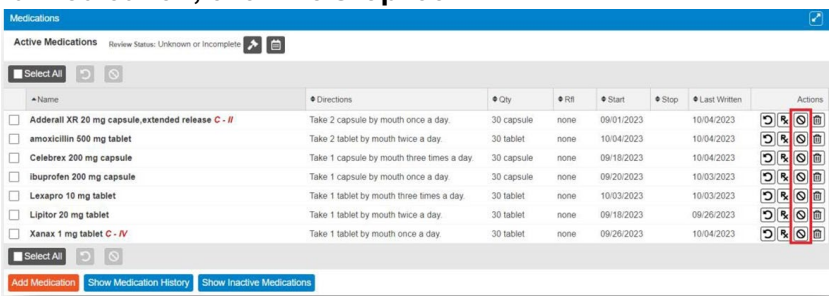


Complete the Add Medication screen, including Patient Directions, Days Supply, Quantity, Refills, Primary Diagnosis, and Start Date. Click **Add**.



Stopping a Medication:

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



At the Stop Medication screen, change as needed the default date in **Date Stopped** and the Completion of Therapy in the **Common Reasons** fields. Click **Stop**.



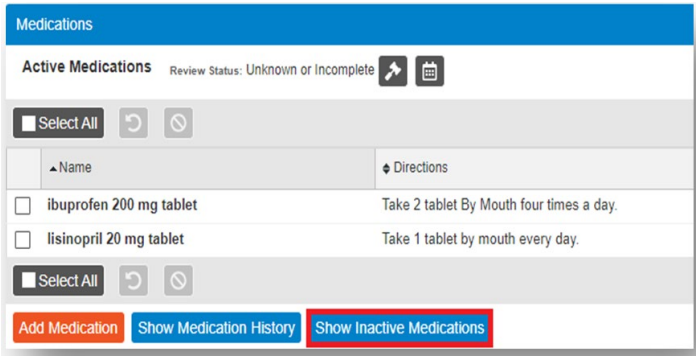
Renewing, Prescribing, Restarting, or Deleting Inactive Medications:

Click one of the icons to the right to Renew (refill) the medication, Prescribe the medication, Stop the medication, or Delete the medication if it was entered in error.



Any medications that have been prescribed or added within CalMHSA Rx, and stopped for any given reason, can be seen within the **Medications** widget. An inactive medication can be activated to perform several actions which include **Renew, Prescribe, Restart,** and **Delete**.

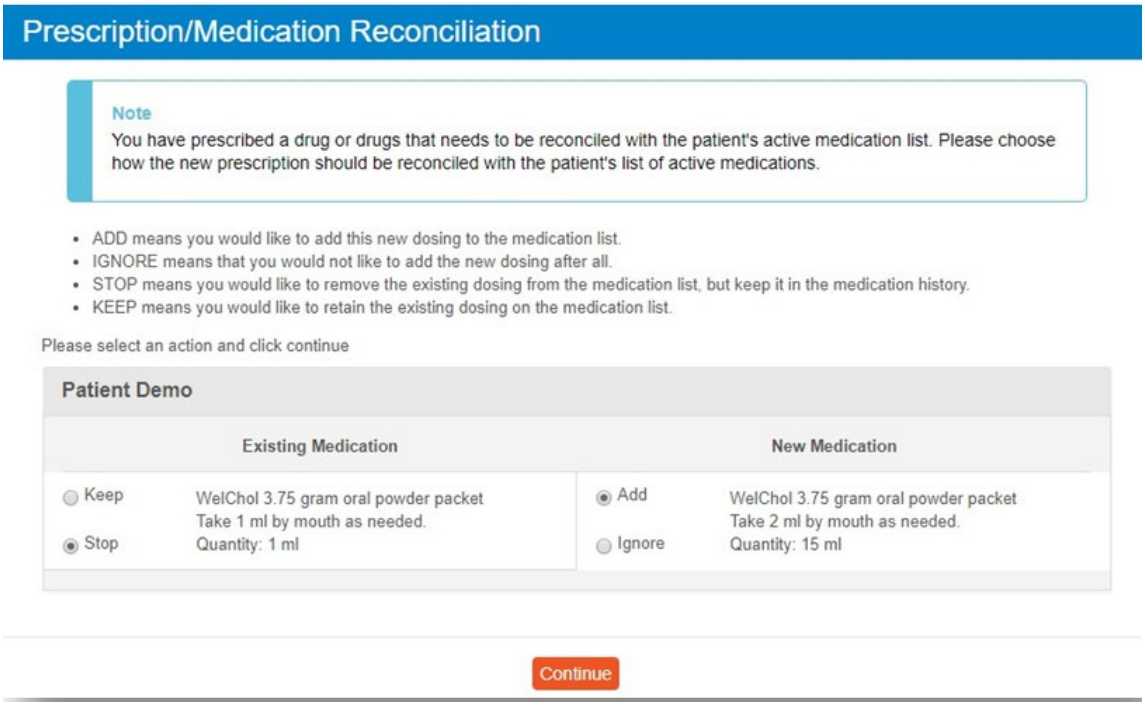
To view inactive medications, click **Show Inactive Medications**.



Prescription/Medication Reconciliation:

When prescribing in CalMHSA Rx, a prescription will be added to the Medications list of the client 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 options are**: Add, Ignore, Stop,** and **Keep**.



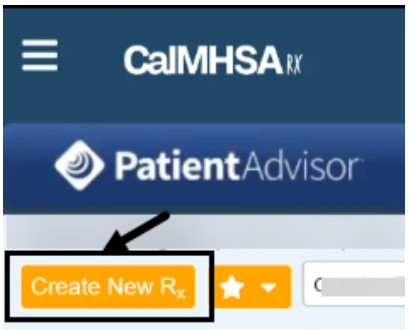
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NEW PRESCRIPTION

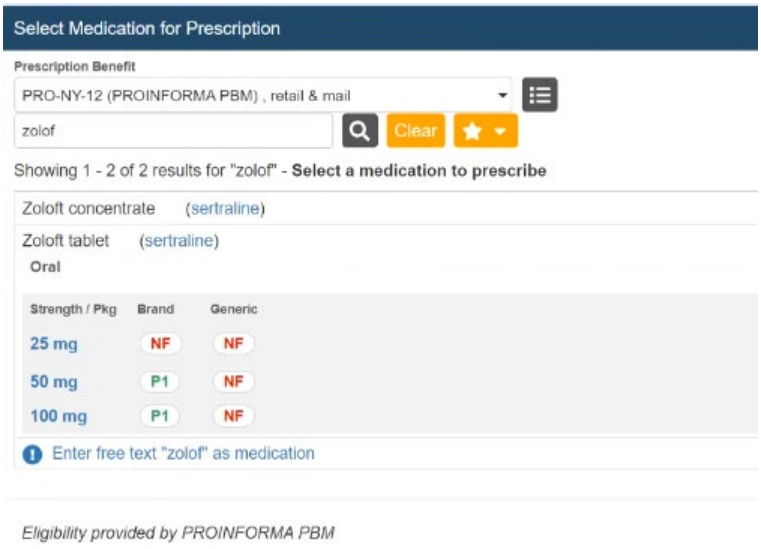
Make sure you have the correct client selected before creating a new prescription

Adding a New Prescription:

To create a new prescription from the E-Prescribing Homepage, click **Create New Rx**.



Type the drug's name in the Search box, select the appropriate medication from the resulting list, and then select the strength.



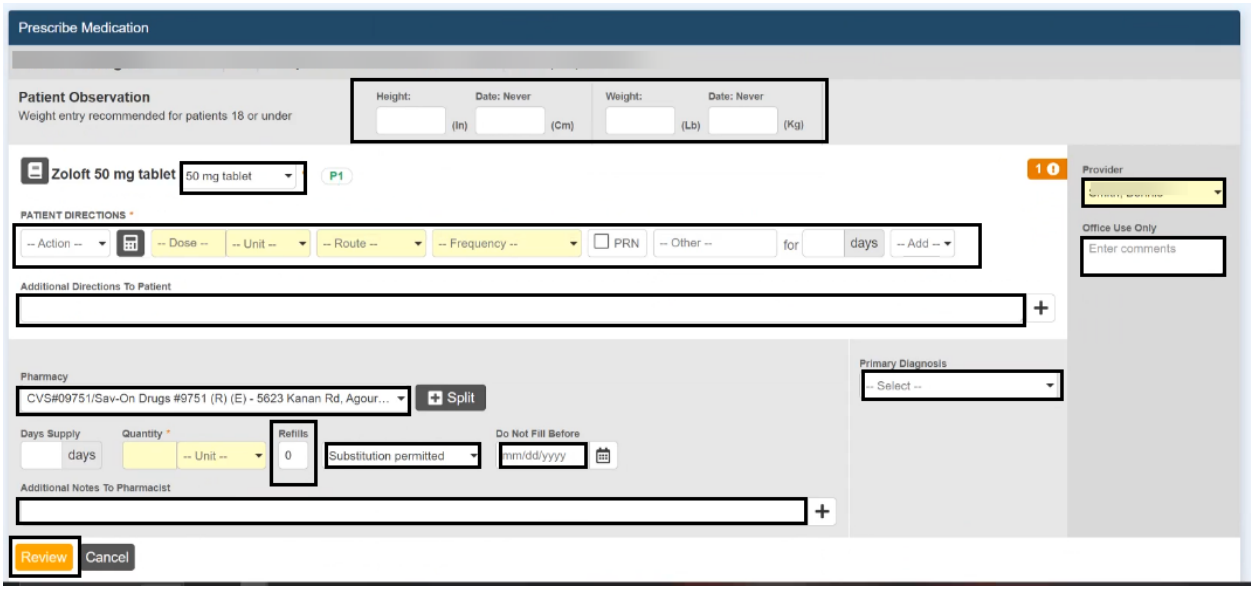
The Prescribe Medication screen launches. Fill in the required fields.

1. **Patient Observation (Height and Weight)** shows the client's height and weight if they were recently observed. These values may be entered or edited on the screen.
2. Verify that the **Provider** and **Pharmacy** fields are correct or use the corresponding drop-down menus to edit.
3. Verify that the **Drug** you have chosen is correct. Use the drop-down menu to change

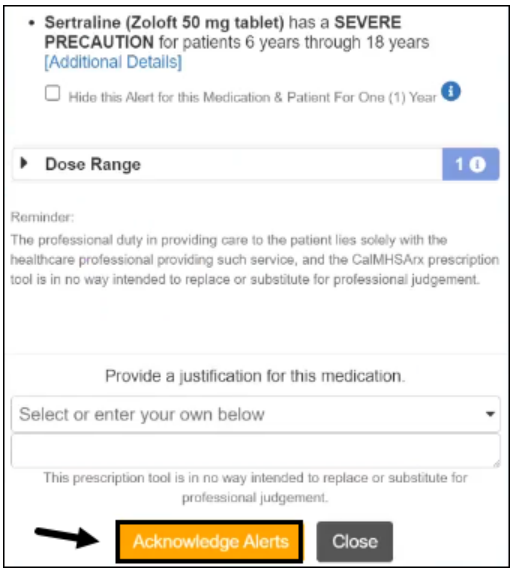
the drug strength.

4. Select the appropriate values from the drop-down menus for the **Sig** details. You can also type in free text into the fields to autofill the sig details faster.
5. Select the **Dose Calculator** icon, if desired. A pop-up calculator will appear on screen.

6. Type in **Days Supply**, from 1 to 365 days, if desired. If a duration is chosen, the medication will be automatically removed from the client's Active Medications list once the duration has passed.
7. Choose a numerical **Quantity** and number of prescription **Refills**. Refills are defaulted to 0.
8. Enter a **Primary Dx** (Diagnosis) and/or **Secondary Dx**, if desired. These fields will only appear if the client has Problem(s) listed in their Problem History. The **Secondary Dx** drop-down menu will only appear once the **Primary Dx** is populated.
9. Enter **Directions to Pharmacist**, if desired. Directions are defaulted to 'Substitution permitted.'
10. Enter **Additional Directions to Patient**, if desired. If you exceed 140 characters, the prescription will be automatically sent by fax and will not be transmitted electronically.
11. Enter **Comments** (for office use only), if desired.
12. Click **Review**.

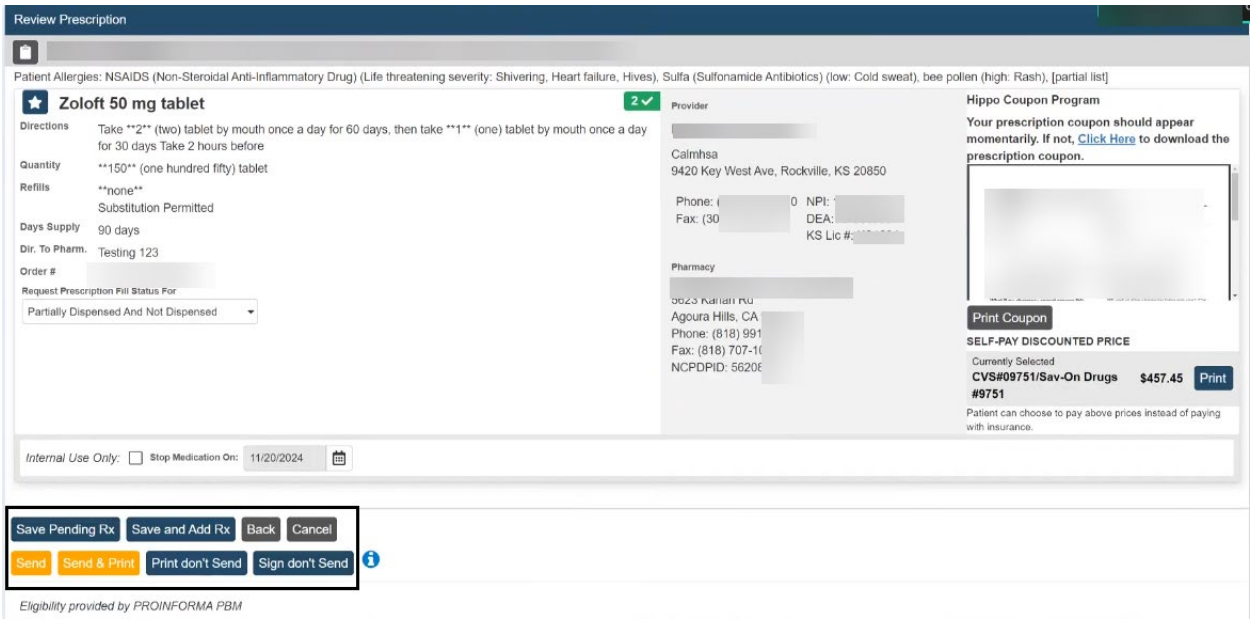


The **Alerts** window pops up. The window will display drug interactions and adverse reaction alerts. Click **Acknowledge Alerts**. The types of alerts are discussed in the Alerts section of this resource packet.



Reviewing a Prescription:

After acknowledging the alerts, The **Review Prescription** screen opens. It is very important to review the prescription to ensure you have created the highest quality prescription for your client.



Clinical Support Staff: If you are a clinical support staff staging a medication for a prescriber, click one of the action buttons at the bottom of the prescription.

1. **Save Pending Rx**: Adds the prescription to the Prescription Management section on the Patient Info Screen for review and signoff.
2. **Save and Add Rx**: Creates a pending prescription and navigates the user back to medication search widget.
3. **Back**: Allows you to edit the Sig details in the Prescribe Medication widget.
4. **Cancel**: Cancels the prescription.

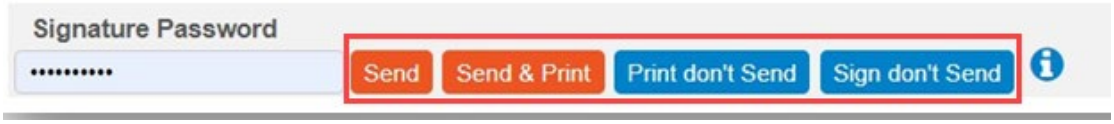


Prescriber:

1. If you are a prescriber reviewing the controlled and non-controlled medications staged by a clinical support staff, click one of the action buttons at the bottom of the prescription.



2. If you are a prescriber and you entered the medication, click one of the action buttons at the bottom of the prescription.



Signature Password:

To take immediate action on the prescription, enter your password, and click one of the four buttons on the bottom of the screen

1. **Send**: Transmits the prescription to the pharmacy electronically
2. **Send & Print**: Transmits the prescription to the pharmacy electronically and prints out a watermarked (non-legal) copy of the prescription for your records.
3. **Print don't Send**: Prints the prescription without sending it to the pharmacy. This option may be used if the client is unsure which pharmacy he or she would like to use. This is required for controlled substance prescriptions in some states.
4. **Sign don't Send**: S igns the medication and adds the medication to the client's active medication list but does not send a prescription to the pharmacy. This is useful if the client was given a sample.

Prescribing Complex Medications:

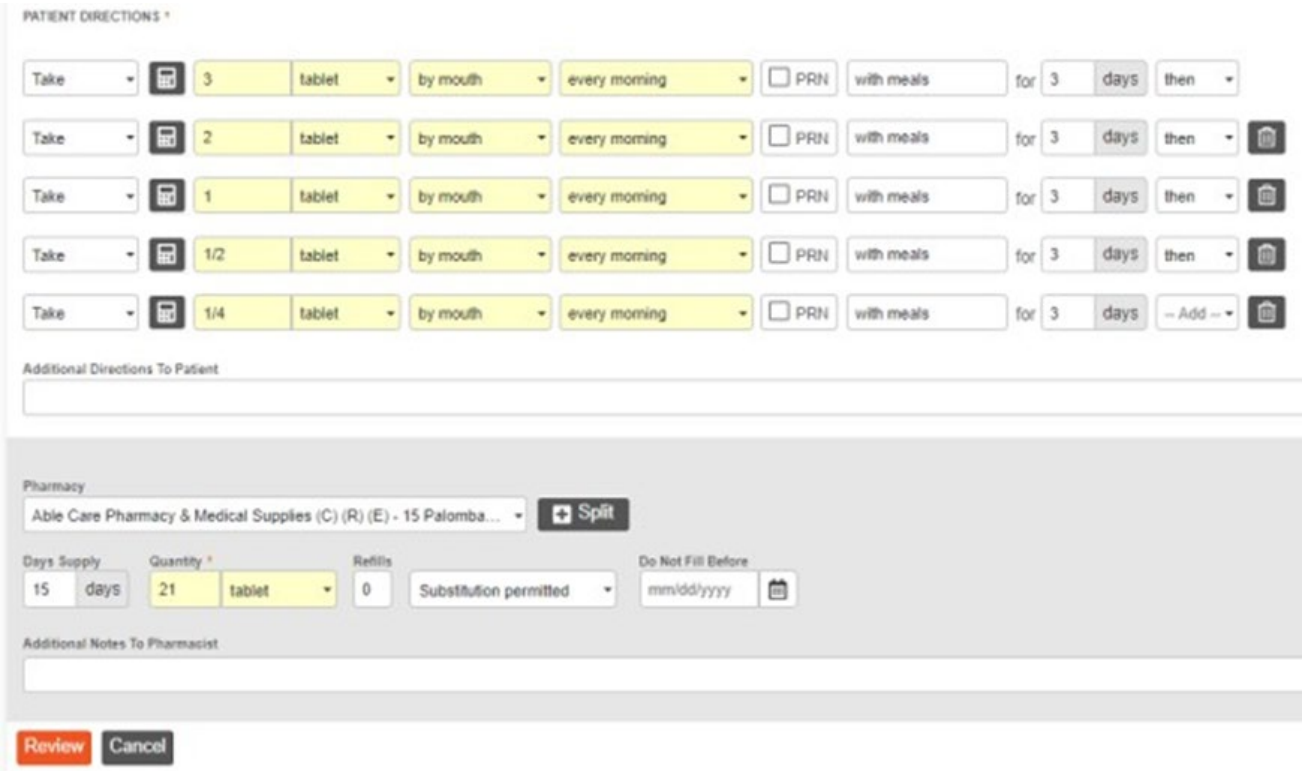
From the **Sig** screen you may also fill out prescription instructions appropriate for complex medications, including prescriptions for tapers, titrations, and variable dosing within a day or other period.

Tapering Prescriptions:

For medications requiring a **taper**, you will see a drop-down menu containing conjunctions (i.e., and, or then).



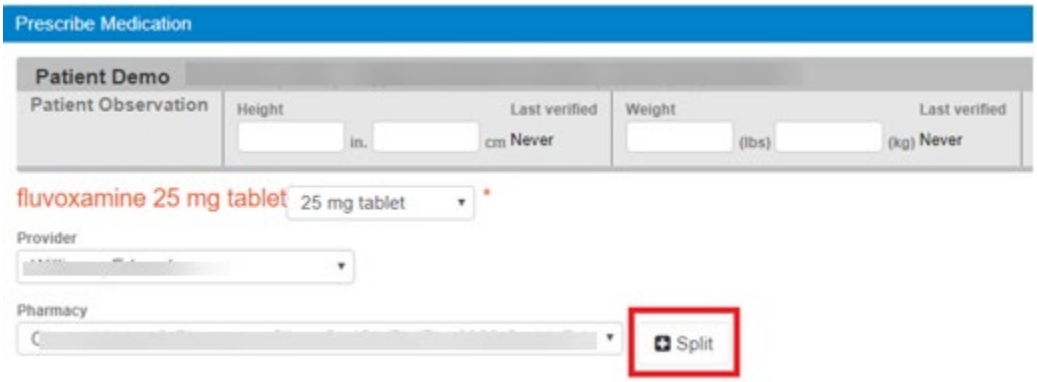
Once you select this drop-down menu, a second line will appear. Relevant information from the first line will auto-populate into the second line. Choose the drop-down menu containing conjunctions as many times as you need for complex medication instructions. Click **Review** when you are done.



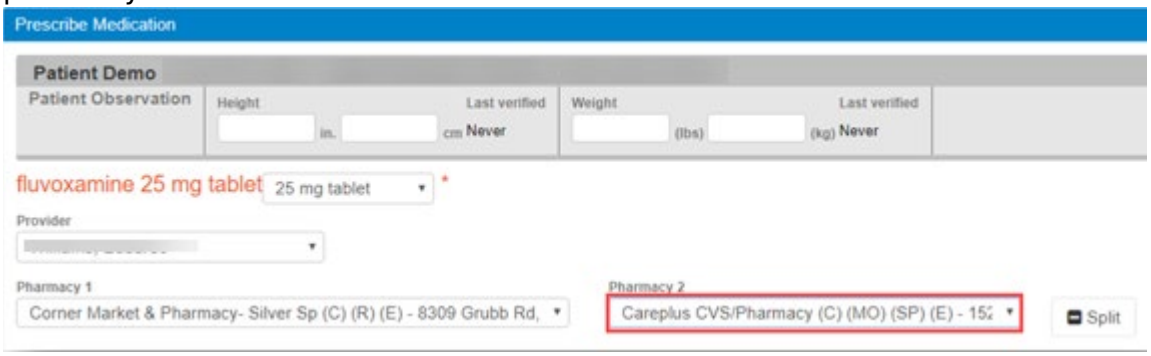
Follow the same steps for **variable dosing**. You may want to type instructions into the **Other** field. Remember to click **Review** when you are done.

Splitting Prescriptions:

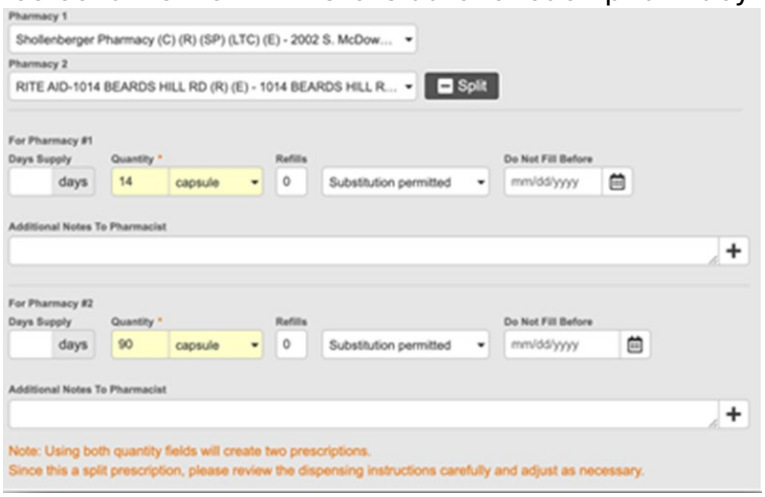
When prescribing, you can split a prescription between two pharmacies. This will send a prescription for the same medication, with the same sig, to two different pharmacies, as you normally would when prescribing. To split, click the **+Split** button to the right of the default pharmacy.



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

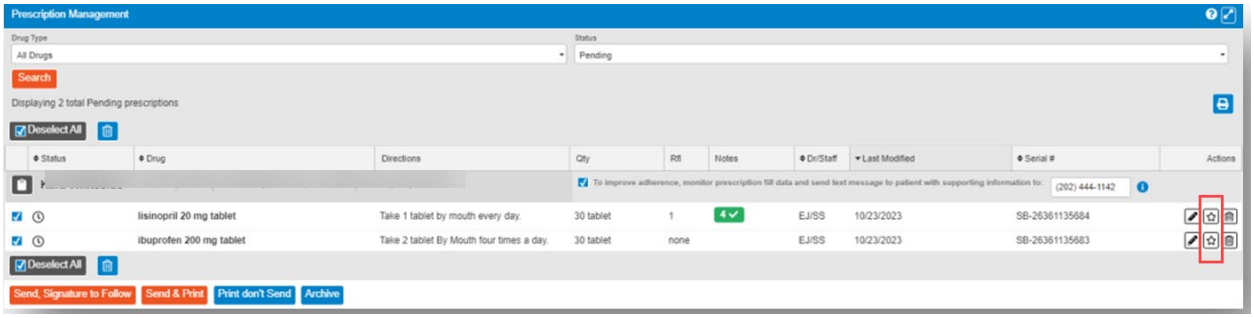


To send two prescriptions, you must select **Quantity** for both Pharmacy #1 and Pharmacy #2. You may also set a specific **Duration** and number of **Refills**. You will be able to select a **Do Not Fill Before** date for each pharmacy.

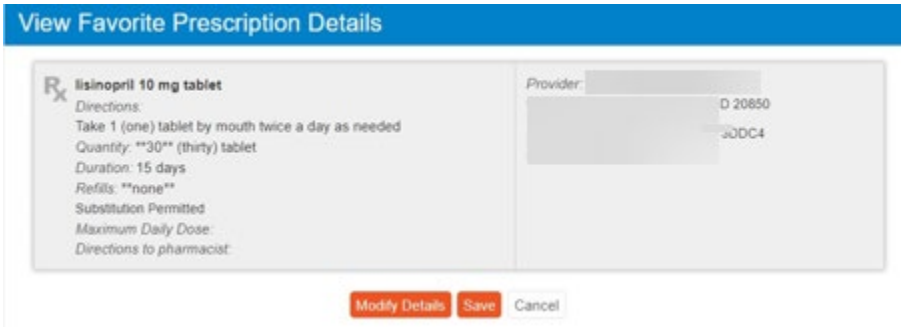


Creating a Favorite Prescription:

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



You will then be taken to the **View Favorite Prescription Details** pop-up, and you will see an overview of the favorite prescription.



Use the **Modify Details** button if needed. Click **Save**. This will add the favorite to your personal list.

Prescribing a Favorite Prescription:

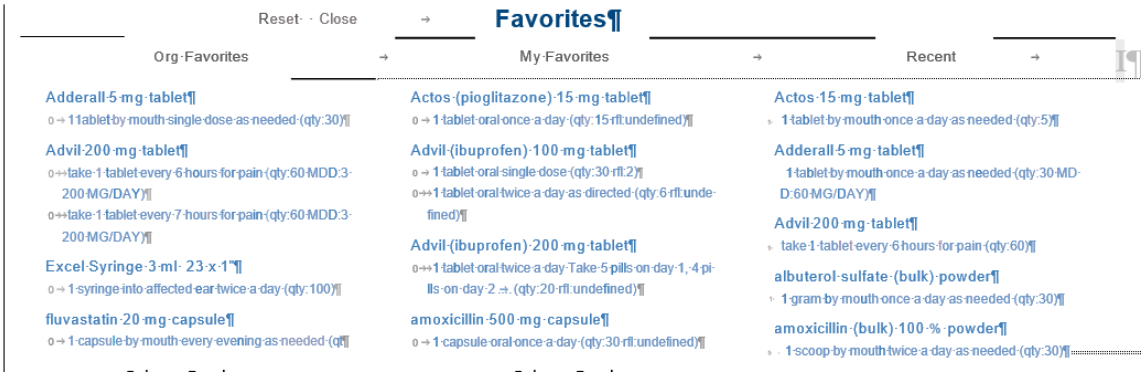
Prescribers will be able to choose from their Practice list (Org Favorites), Location list (if applicable), or Individual Favorite list (My Favorites). Favorites are now searchable by typing into the Search box.

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 provider location's settings.

To prescribe a favorite, click the **Favorites** drop-down located within the context bar.



Next, select the desired favorite prescription to use from the available list(s). You may also use the search field to narrow your results.



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

NOTES

PRESCRIBING CONTROLLED SUBSTANCES

Electronic Prescribing of Controlled Substances (EPCS) Onboarding:

To prescribe controlled substances electronically, a provider must have successfully completed the electronic prescribing of controlled substances (EPCS) onboarding process. If this is your first time to e-prescribe controlled substances, you must complete the full EPCS onboarding process through Logical Access Control (LAC). To start the process, contact MIS at EHRAccessRequest.bhs@sdcounty.ca.gov.

If you previously completed the EPCS onboarding and has e-prescribed controlled substances, before you can begin e-prescribing controlled substances in CalMHSA Rx, contact MIS at EHRAccessRequest.bhs@sdcounty.ca.gov to have your EPCS account activated.

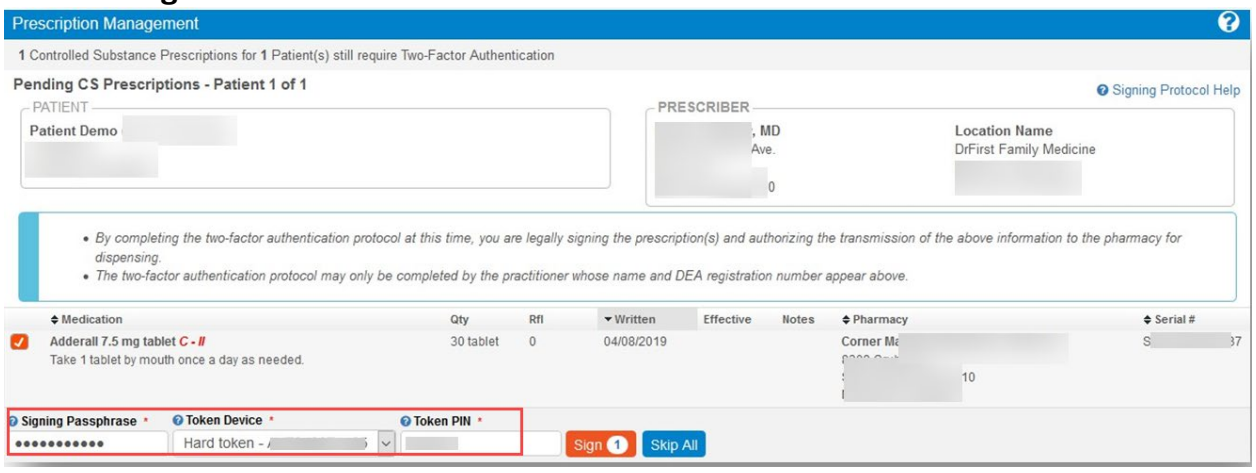
Signing a Controlled Substance Prescription:

If you are an active EPCS prescriber, you will be able to sign and send controlled substance prescriptions electronically within CalMHSA Rx.

From the Review Screen:

When creating a prescription, users can sign off on controlled substances within the **Review Screen**.

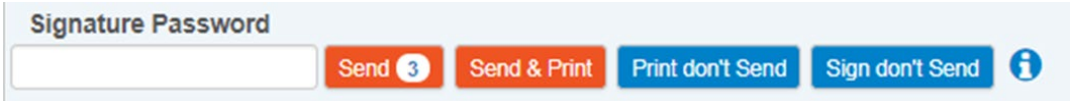
1. Once you enter your signature password, the Two Factor Authentication (TFA) section will display.
2. Check any controlled substances you wish to process. Then, enter your signing passphrase, choose your EPCS token, and enter the OTP/security code.
3. Click **Sign and Send**



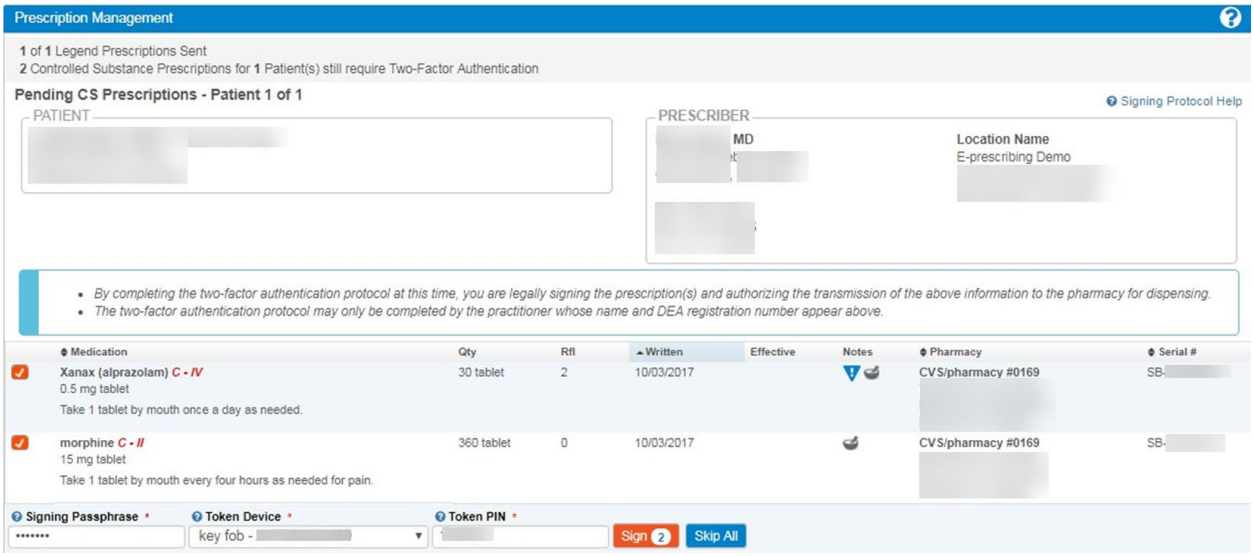
From the Prescription Management

Users can sign off on controlled substance prescriptions from the Prescription Management screen.

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



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. Check the box next to the medication name and enter your two-factor authentication to complete the prescription.



You can also choose **Skip All** to move forward and process these later.

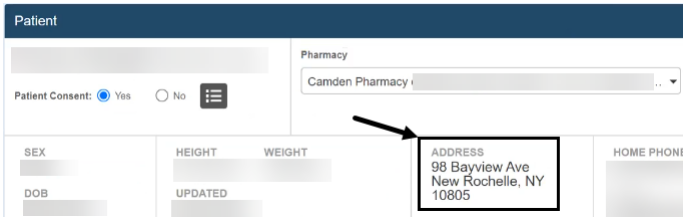
From a Prescription Report:

The **Prescription Report** allows users to manage all prescription activity in one convenient location.

1. Click **Prescription Report** in the blue toolbar at the top of the screen.
2. Select the appropriate provider or select **All Providers** from the drop-down list.
3. Select either **All Patients** or the **Current (patient)**.

4. Select the appropriate Status6
    a. **All**: displays pending and completed prescriptions.
    b. **Pending**: displays only prescriptions that have not had any action taken on them.
    c. **Completed**: displays completed prescriptions (signed and sent or signed and printed).
        i. When **Completed** is selected, a date filter is displayed. Select a date range.
    d. **Undeliverable**: displays prescriptions that have not been delivered to the pharmacy.
5. Click on the **Display Report** icon to show the report on screen. All prescriptions that match the criteria will be displayed below.
6. The report contains multiple columns and will show you the Status of the prescription and sig details, allowing you also to act on each prescription.
    a. **Status**: shows whether a prescription was successfully sent to the prescription's 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.
7. 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.
8. Enter your **Signature Password**.
9. Click one of the action buttons: **Send**, **Send & Print**, **Print don't Send**, or **Sign don't Send**.

Note: A client's full address must be listed in CalMHSA Rx to prescribe controlled substances.



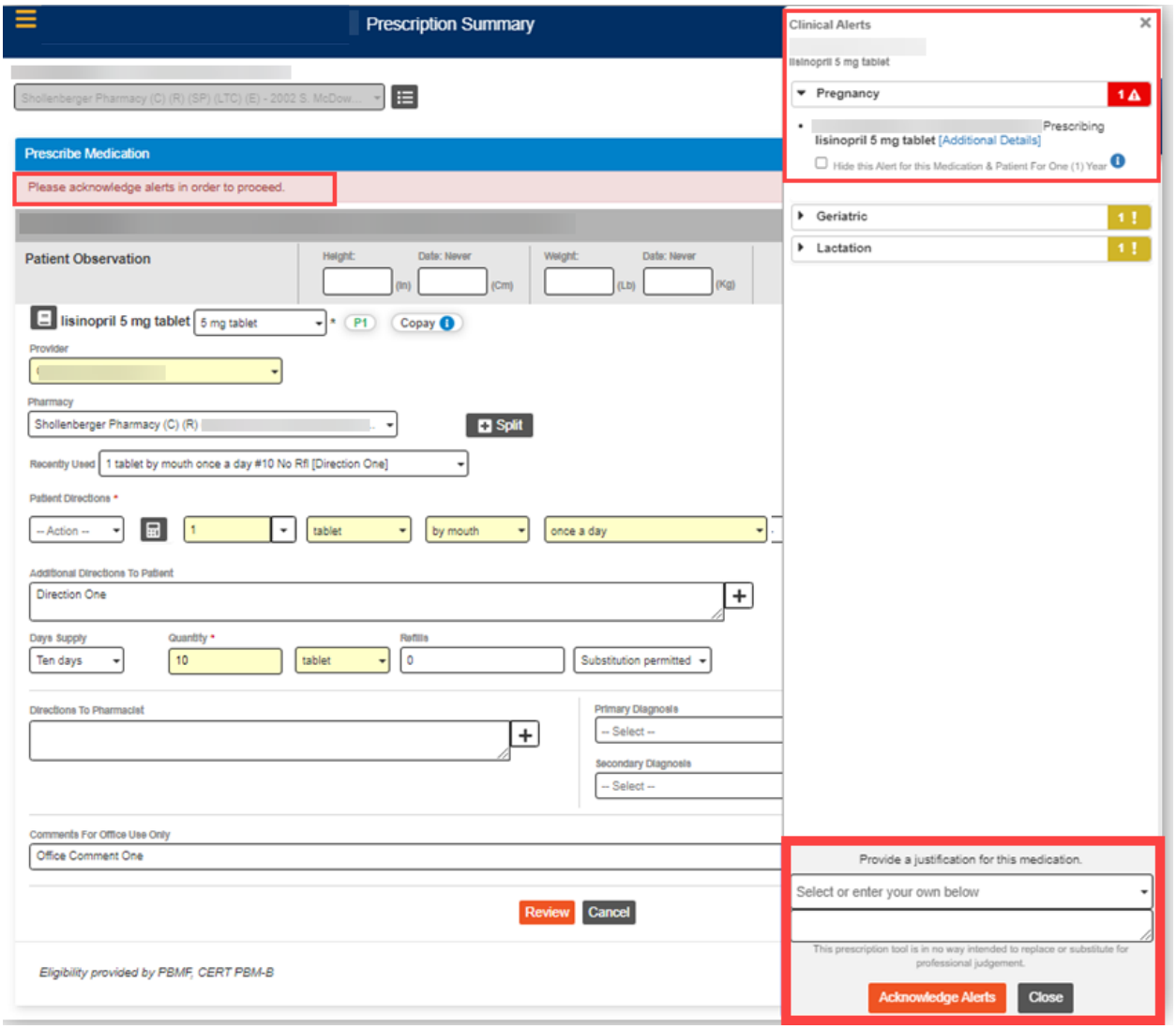
ALERTS

Clinical Alerts:

When a drug is chosen that prompts a clinical alert, the alert will display throughout the prescribing process.

Alerts that require that you acknowledge the alert will pop up automatically. Otherwise, click the alert at any time to see more details, then select the **Acknowledge Alerts** button to show you reviewed these alerts.

You can provide a justification for prescribing the medication despite the warning.



Below are the clinical alerts within CalMHSA Rx:

Drug interaction alert: When prescribing medications, the system will check against the active medication list for drug to drug interactions.

Allergy interaction alert: When prescribing medications, the system will alert you if you are prescribing a medication that is associated with a drug on the list of allergies and adverse reactions.

Drug-Diagnosis interaction alert: When prescribing medications, the system will alert you if you are prescribing a medication that may interact with a diagnosis or Problem documented for your client.

Pregnancy and Lactation interaction alert: You can input a client's pregnancy or lactation status. Once selected, you will receive any precautions associated with pregnancy or lactation.

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.

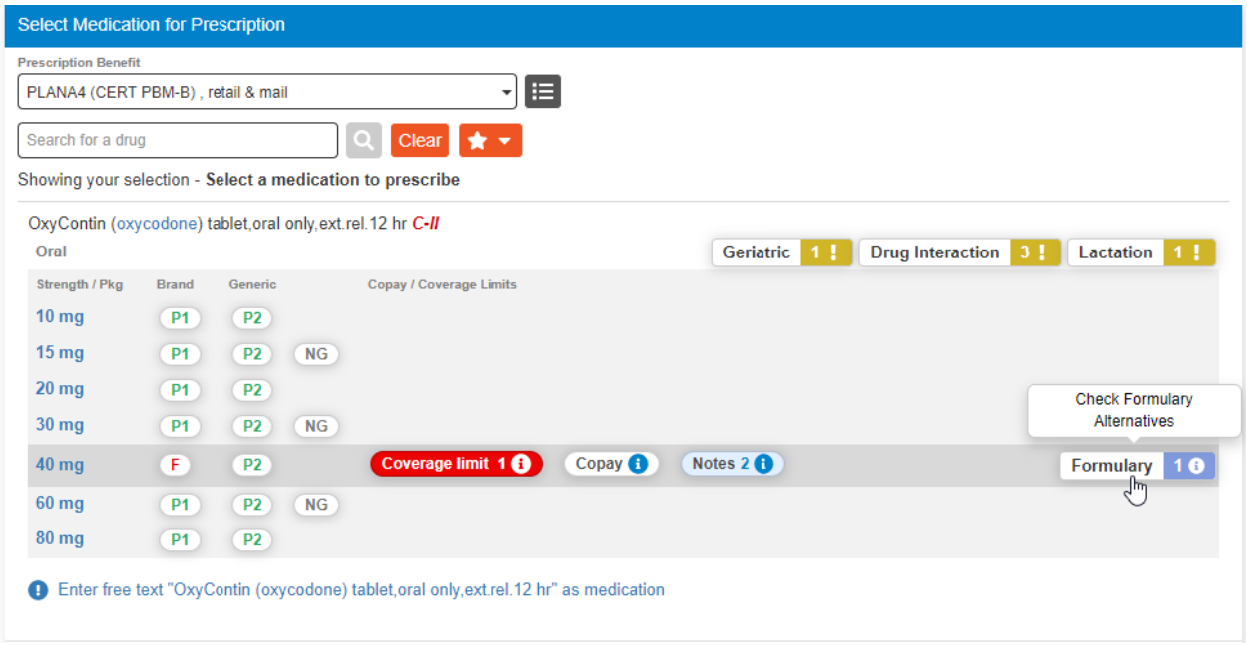
Formulary Alerts:

All CalMHSA Rx users have formulary checking enabled. Formulary information in CalMHSA Rx is obtained from SureScripts.

1. When you select a client, the system will automatically search for his or her eligibility using the client'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.

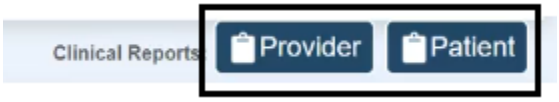
2. If you try to prescribe a medication that is not covered, or has higher co-pay, you will receive a formulary alert in the system.
3. Click the formulary alert at any time to select an alternative formulary medication.
4. Override the alert or select from the list of alternatives and prescribe a medication that may have lower co-pay.



NOTES

CLINICAL REPORTS

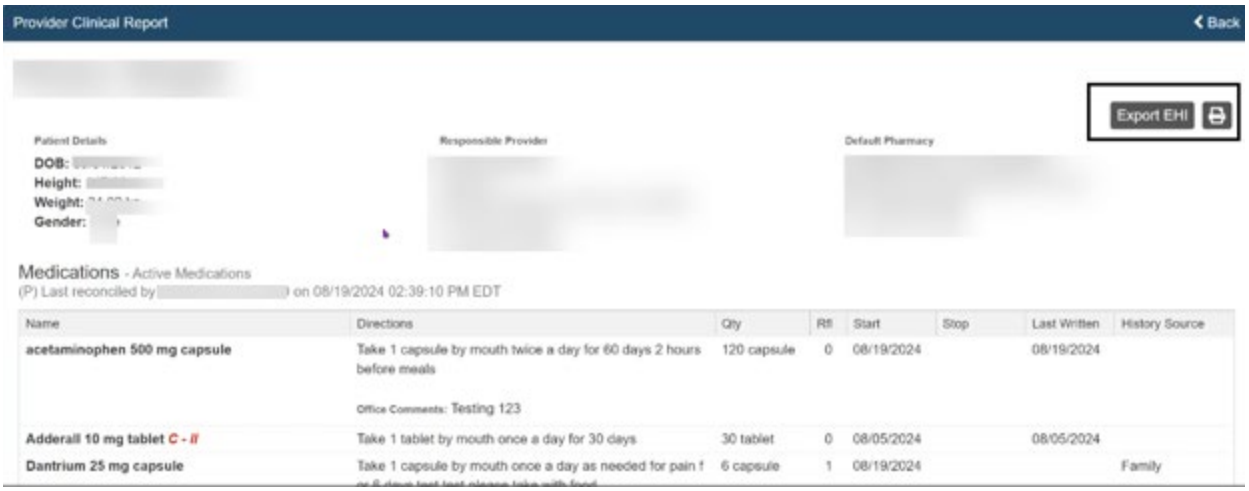
The medication reports consist of two reports that display within the E-Prescribing Homepage after you have selected a client. These two reports are the Provider Clinical Report and the Patient Clinical Report.



Provider Clinical Report

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

1. Click the **Provider** button within the **Patient** widget.
2. The **Provider Clinical Report** will then display.
3. To print the report, click **Print** on the top right of the report.

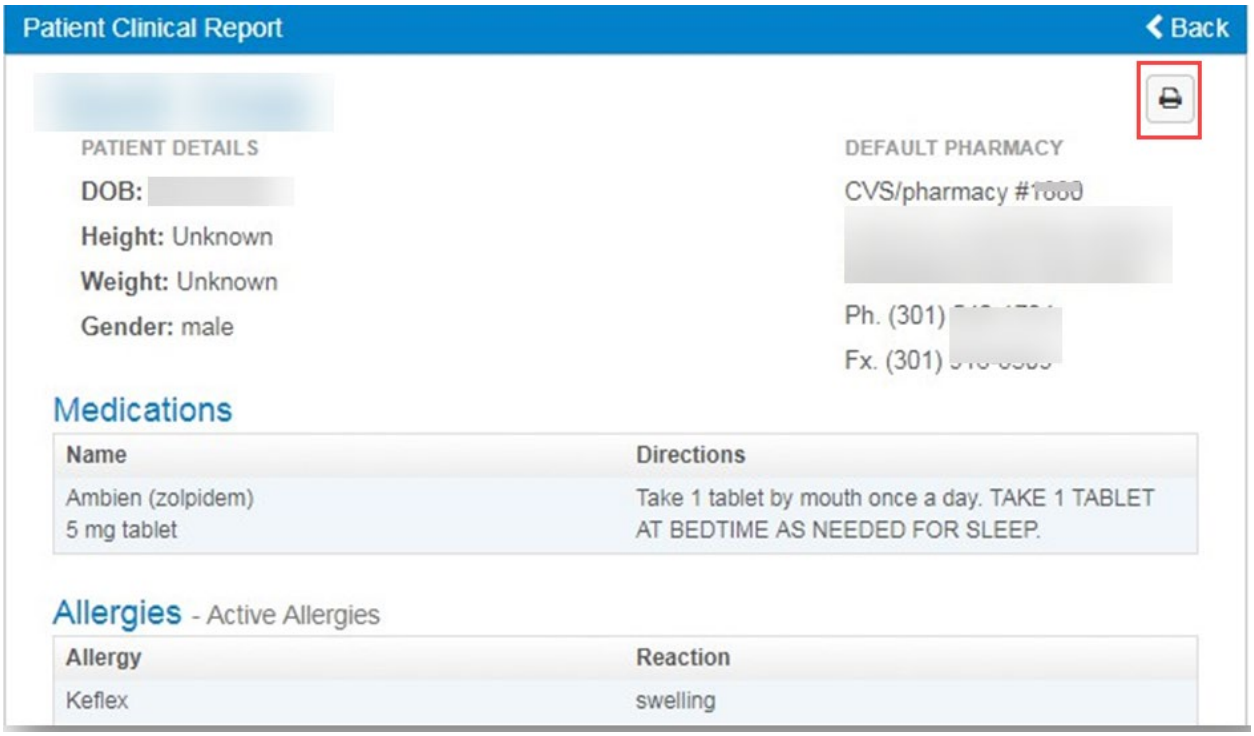


Patient Clinical Report:

The **Patient Clinical Report** is a wallet-sized version of a client's current medication, allergy and problem list. This is an ideal way for clients to keep track of the medications they are currently taking.

1. Click the **Patient** button within the **Patient** widget.
2. The **Patient Clinical Report** will then display.

3. To print the report, click **Print** on the top right of the report.



If you encounter issues with CalMHSA Rx, visit CalMHSA Rx - 2023 CalMHSA.

If you have clinical questions, contact qimatters.bhs@sdcounty.ca.gov.