



Pharmacy Services...
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Facility Access Portal

User Guide

Version 1.0

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Introduction

The Facility Access Portal enables you to create, edit, and view Facility and Nursing Home patient records located on the Pharmacy Management System of the pharmacy that services your facility.

To use this access portal, you must first log in with the user name and password that was provided to you by your pharmacy.

After logging in, you can complete important tasks essential to providing your patients with the highest level of care. These tasks include the following:

- Establishing new patients on the pharmacy system
- Maintaining patient records required to provide accurate prescription administration
- Assigning both a primary and secondary physician to a patient
- Recording doctors orders, instructions, and comments
- Recording patient comments
- Specifying non-charted orders and charted orders
- Maintaining a record of the patient's third party providers
- Maintaining and accessing an accurate patient prescription history
- Ordering new prescriptions
- Refilling existing prescriptions
- Discharging patients

Accessing the Program

The Facility Access Portal is an internet-accessed application located on your servicing pharmacy's system. Your pharmacy will provide you with a unique internet address (URL) to use to access this program. You can store the address as a bookmark in your browser or an icon on the computer desktop, enabling you to quickly access the pharmacy's Facility Access Portal.

User Interface Conventions

As a web-based application, the Facility Access Portal uses many familiar conventions. Unlike some web-based applications, you can use the navigational features of your browser to return to previously viewed pages or screens. The following paragraphs describe the navigational and information entry procedures that are specific to the Facility Access Portal application.

Menu navigation

The left side of the user interface screen contains seven buttons for accessing the various parts of the application. After you have logged in, you can use these buttons to initiate a task.

These buttons are the following:

- **Home** - Redisplays the home page
- **Patient Search** - Opens a dedicated Patient Search page
- **Add Patient** - Opens the Add New Patient page
- **Order Status** - Opens the Order Status page
- **Doctor Search** - Opens a dedicated Doctor Search page
- **Drug Search** - Opens a dedicated Drug Search page

Using Hypertext Links

The Facility Access Portal depends on the use of hypertext links to access certain pages and to navigate from page to page. Most pages use one or more hypertext links to access other pages and information related to the task you are completing.

The Patient Profile Page contains 12 separate hypertext links to enable you to perform various tasks associated with the patient, including the following:

- Changing the physicians assigned to the patient
- Changing patient information
- Editing patient comments
- Viewing coverage details
- Viewing the list of routine, treatment, and PRN meds
- Reordering, discontinuing, and ordering new meds

Facility Access Portal Pages

The following paragraphs describe the various pages in the Facility Access Portal web-based application and how to use them to maintain patient, doctor, and prescription information.

The Home Page

The Home Page provides a 7-button menu used to access the various pages of the program, a login confirmation box that shows your login information and when your session expires, and three basic search boxes used to search for Patients, Doctors, or Drugs.

Searching

The center area of the user interface of the Home Page provides three different search commands.

- Patient Search
- Doctor Search
- Drug Search

If you initially need to search for a patient, doctor, or drug, you can use one of the search boxes on the home page. Each of these search boxes is identical to the corresponding individual search page except for Patient Search, which includes two additional check boxes on the individual search page.

Additional Pages

In addition to the six program pages accessible from the menu there are 15 additional pages that you can access from hypertext links on the menu-accessible pages.

Getting Started

To begin to use the Facility Access Portal, you must first open the browser that you want to use, and then enter the internet address that your servicing pharmacy gave you. You can use one of the following approved browsers:

- Mozilla Firefox, Version 2.0 or greater
- Microsoft Internet Explorer, Version 6.0 or greater
- Netscape, Version 7.0 or greater

Note: Opera is not approved for use with the Facility Access Portal web-based application.

After opening your browser, type the address provided to you in the address box of the browser, then press the Enter key. The Facility Access Portal Log in Page is displayed.

Note: To enable you to access this application more easily, you can store the Facility Access Portal internet address (URL) as a shortcut either on the Links tool bar of your browser, or as a desktop shortcut.

Logging On

When you first access the system, your browser will display a login screen.

To log in, complete the following steps:

1. In the **Username** field, type the user name that was provided to you by your servicing pharmacy.
2. In the **NH code** field, type the **Nursing Home** or **Facility** code that was assigned to your facility by your pharmacy.

3. In the **Station ID** field, type the Station ID that was assigned to your workstation.
4. In the **Password** field, type the password that was provided to you by your servicing pharmacy.
5. Click **Submit**. The log in process is completed, and the application displays the **Home** page.

Performing Searches from the Home Page

From the Home Page, there are two ways in which you can search:

- Using one of the three search boxes located on the Home Page
- Using one of the search buttons located on the menu on the left side of the Home Page to open a dedicated search page.

You can search for Patients, Doctors, or Drugs.

You can search for patients by

- Last name
- Medical Record Number (MRN#)
- Social Security Number (SSN)

You can search for doctors by

- Last name
- Drug Enforcement Administration Number (DEA#)

You can search for drugs by

- Drug Name
- Drug Name and Strength
- National Drug Code (NDC)

Tip: When searching by last name or drug name from either the Home Page or a dedicated search page, you can either click a letter button for the first letter of the last name or drug name, or you can type one or more letters of the last name in the **Search for** field. The more letters of the last name or drug name that you type, the more focused the search will be.

► To Search Directly from the Home Page:

1. To search by last name or drug name, click the first letter of the name. The **Search Results** page opens showing a list of results that meets the search criteria.
OR
In the **Search for** field, type one or more characters that meets the acceptable search criteria. Each search box lists the types of data for which it can search.

2. Click the **Submit** button for the search box from which you are searching. The results are displayed in the search results page.
3. On the **Search Results** page, click the Patient Name, Doctor Name, or Drug Name. The record for the name you selected is displayed.

Note: When searching for a patient from the Patient Search box, check **Include Discharged** to include all previously discharged patients in the search.

► To Search from a Dedicated Search Page:

1. From the menu in the left column, click the button for the type of search that you want to complete. The selected search page opens.
2. To search by last name or drug name, click the first letter of the name. The search results page opens showing a list of results that meets the search criteria.
or
In the **Search for** field, type one or more characters that meets the acceptable search criteria. Each search box lists the types of data for which it can search.
3. Click the **Submit** button for the search box from which you are searching. The results are displayed in the search results page.
4. On the **Search Results** page, click the Patient Name, Doctor Name, or Drug Name. The record for the name you selected is displayed.

Note: When searching for a patient from the Patient Search *page*, check **Include Discharged** to include all previously discharged patients in the search, **or** check either **MRN Search** to search by Medical Record Number or **SSN Search** to search by Social Security Number. You can choose only one search filter at a time.

Establishing a New Patient

To establish a new patient, complete the following steps:

1. From the **Home** page, click **Add Patient**. The **Add New Patient** page opens.
2. In the **Last Name** field, type the patient's last name.
3. In the **First Name** field, type the patient's first name.
4. In the **Birth date** field dropdown boxes, choose the appropriate Day, Month, and Year.
5. In the **Gender** field dropdown box, choose Male or Female.
6. In the **NH code** field, if the code is not already present, type the code assigned to you by your pharmacy.
7. In the **Station** field, if one is not present, type the ID for the (Nurse) station to which the patient is assigned.
8. In the **Room** field, type the patient's assigned room number.
9. In the **Bed** field, type the patient's assigned Bed number.

10. In the **Med Rec#** field, type the Medical Record Number (MRN).
11. In the **Admit Date** field, use the dropdown boxes to select the date that the patient was admitted to the facility.
12. Verify that the data you entered is correct, then click Add.

Assigning a Doctor to a Patient

To assign a doctor to a patient, complete the following steps:

1. Search for the patient for which you want to assign a doctor, then click the patient's name to open the patient record. The **Patient Profile** page for that patient opens.
2. On the **Patient Profile** page, opposite the **Primary MD** field, click **Edit Doctor**. The **Edit Physician** page for Edit Primary Physician opens.
3. Verify that the name of the patient to whom you want to assign a doctor is shown next to **Patient Name**.
4. Click **Doctor Search**. The **Doctor Search** page opens.
5. Type the name of the doctor or click the first letter of the doctor's name. The **Doctor Search Results** page opens.
6. Click the name of the doctor that you want to assign to the patient. The **Edit Physician** page is redisplayed showing the name of the selected doctor in the **Change to** field.
7. Click **Update**. The message *Edit Patient Physician Was Successful. Return to <Name of Patient>* is displayed.
8. Click the patient's name. The **Patient Profile** page for the patient is redisplayed.

Adding a Patient's Third Party Coverage Information

The patient's third-party coverages are entered into the system by the servicing pharmacy. You will need to Fax or otherwise transmit the patient's insurance coverage information to the servicing pharmacy. The pharmacist will then add the patient's insurance coverage information to the system. You will be able to view and verify a patient's coverage information after it has been entered into the system.

Verifying a Patient's Third Party Coverage Information

To Verify a Patient's Third Party Coverages, complete the following steps:

1. Search for the patient whose coverage you want to verify, then click the patient's name to open the patient record. The **Patient Profile** page for that patient opens.
2. In the **Patient Coverage** field, abbreviations for the patient's third-party coverages are shown. To view the details of these coverages, click **Details**. The **Patient Coverages** page opens.
3. To redisplay the **Patient Profile**, click the patient's name or click the Back button on your browser.

Using the Patient Profile Page

You can use the Patient Profile page to complete the following:

- View all available information about the patient including:
 - Assigned doctors
 - Order status
 - Prescription details
 - Non-charted orders
 - Charted orders
- Begin a task or process such as:
 - Ordering new prescriptions
 - Refilling existing prescriptions
 - Assigning or changing a physician
 - Specifying non-charted orders and charted orders
 - Adding and editing patient comments
 - Adding and editing physician comments
 - Discontinuing non-charted orders and charted orders
 - Editing patient details
 - Discharging patients

Reviewing a Patient's History

To Review a Patient's History, complete the following steps:

1. Search for the patient whose history you want to view. The **Patient Search Results** page opens.
2. On the **Patient Search Results** page, click the patient's name to open the patient record. The **Patient Profile** page for the patient opens.
3. Use the **Patient Profile** page to review details of the patient's history or click on available hypertext links to view details about doctors, doctor's comments, patient comments, non-charted orders, and charted orders.
4. On the **Patient Profile** page, use the scroll bar or the arrow keys to view the entire page.

Ordering New Prescriptions

There are two ways to begin ordering a new prescription. New prescriptions are always ordered in conjunction with a patient's name or a patient's record.

To order a new prescription, complete the following steps:

1. To begin the new order, search for the patient's name. The **Patient Search Results** page opens.
2. In the Action column in the row for the patient for which you searched, click **Rx Order**. The **Order Rx** page for this patient opens.
or
Click the patient's name. The Patient Profile page for this patient opens. Under **Medications** at the right side of the **Action** row, click **Order New**. The Order Rx page for this patient opens.
3. Click **Drug Search** next to the **Drug** field. The Look up NDC Drug Search page opens.
4. In the **Search for** field, type the name of the drug that you want to order and click search, or click the first letter of the name of the drug.

Note: To reduce the time it takes to locate the drug name in the database, type the name of the drug in the **Search for** field. You can also type just the first few letters of the drug name.
5. To change the name of the doctor, click **Doctor Search**.
6. In the **Quantity** field, type the number of pills to be dispensed for this prescription.
7. In the **Number of Refills** dropdown box, select the number of refills allowed for this prescription.
8. If a generic product is not permitted, click **Brand Medically Necessary**.
9. In the **Date Written** dropdowns select the date that the prescriptions was written. The date is automatically set to today's date. Change this date if required.
10. In the **DC Date** (Discontinue Date) field, select the date that this prescription should be discontinued.
11. In the **Instructions** box type any special instructions that need to be issued with this medication.
12. In the **Rx Diagnosis** field, type the diagnosis code or the diagnosis description.
13. In the **Rx Comment** field, type any appropriate comments concerning taking this medication.
14. If this is a Stat order, type **Y** in the **Stat order** field.
15. Select the appropriate Hours of Administration (HOA). For example, if the prescription is to be taken 4 time a day, check 6:00 AM, 12:00 PM, 6:00 PM, and 12 AM.
16. Click **Review** to review your prescription order. The Confirm Order page opens.

17. On the **Confirm Order** page, verify that all fields contain the correct information. If the order is correct, click **Place Order**; if the order is incorrect, click **Edit Order** and make the necessary changes.

Reordering Prescriptions

You can reorder a prescription from two different locations in the program:

- Patient Profile page
- Prescription Detail page

When you click **Reorder Meds** on either page, it opens the Reorder Med page.

To reorder medication, complete the following steps:

1. From the Patient Profile page, click **Reorder Meds**,
or
Click the drug name; the **Prescription Detail** page opens. From the Prescription Detail page, click **Reorder Meds**. The Reorder Med page opens.
2. On the **Reorder Med** page, locate the prescriptions that you want to reorder, and click the check box in the Reorder Med column for that prescription.
3. After you have placed check marks for all the prescriptions that you want to reorder, click the **Submit** button on the lower right corner of the page.

Viewing Order Status/Canceling an Order

Complete the following steps to view the status of an order or cancel an order:

1. From the menu, click **Order Status**. The Order Status page opens.
2. In the **Order ID** field, type all eight digits of the Order ID, including leading zeros, and click **Submit**. The order information is displayed on the Order Status page.
3. To cancel the order, click **Cancel Order**. The Cancel Order page opens.
4. In the **Cancellation Text** field, type the reason for cancelling the order.
5. Click **Submit**. The order cancellation information is transmitted to the pharmacy.

Discontinuing Medications

You can discontinue a prescription from two different locations in the program: The Patient Profile page, and the Prescription Detail page. When you click **Discontinue Meds** on either page, it opens the Discontinue Rx page.

To discontinue medication, complete the following steps:

1. From the **Patient Profile** page, click **Discontinue Meds**, **or** from the Prescription Detail page, click **Discontinue Meds**. The Discontinue Rx page opens.

2. On the **Discontinue Rx** page, locate the prescriptions that you want to discontinue, and click the check box in the **Discontinue** column for that prescription.
3. After you have placed check marks for all the prescriptions that you want to discontinue, click the **Discontinue** button on the lower right corner of the page. The prescriptions that you checked will be discontinued.

Adding and Editing Doctor Comments

To add or edit doctor comments, complete the following steps:

1. From the menu, click **Doctor Search**. The **Doctor Search** page opens.
2. Click the first letter of the doctor's last name, or type the doctor's last name in the **Search for** field. The Doctor List page opens.
3. On the Doctor List page, click the name of the doctor for whom you want to add or edit comments. The Detail page for the doctor opens.
4. On the Detail page, click **Add/Edit Doctor** comments. The **Edit Doctor Comments** page opens.
5. To add a new comment, type the comment in the **Add New Comment** field, then click **Add**.
6. To edit existing comments, revise one or more individually displayed comments, then click **Update**.

Adding and Editing Patient Comments

To add or edit patient comments, complete the following steps:

1. From the Patient Profile page, on the right side of the **Patient Comments** field, click **Edit**. The Edit Patient Comments page opens.
2. To add a new comment, type the comment in the **Add New Comment** field, then click **Add**.
3. To edit existing comments, revise one or more individually displayed comments, then click **Update**.

Adding Ancillary Orders

Ancillary orders that you enter are displayed on the Patient Profile page as either Non-charted Orders or Charted Orders. After you have entered an ancillary order, a pharmacist will review the order and assign it as either a Non-charted Order or a Charted Order.

You can begin an ancillary order from one of two locations: on the Patient Search Results page, or on the Patient Profile page. To add an ancillary order, complete the following steps:

1. From the **Patient Search Results** page, click **Anc. Order**. The **New Ancillary Order** page opens.
or
From the **Patient Profile** page, click **New Ancillary Order**. The **New Ancillary Order** page opens.

2. In the **Enter Text** field, type the Ancillary Order instructions.
3. In the **Hours of Administration** area, click on each individual time that the order is to be carried out during the day.
4. In the **DC date** (Discontinue Date) fields select the date that the order is to be discontinued.
5. Click **Place Order**. The order is placed and added to any currently listed.

Viewing Non-charted Orders

You can view non-charted orders near the bottom of the Patient Profile page.

To view non-charted orders, complete the following steps.

1. Search for the patient whose non-charted orders you want to view. The **Patient Search Results** page opens.
2. On the **Patient Search Results** page, click the patient's name to open the patient record. The **Patient Profile** page for the patient opens.
3. Scroll down toward the bottom of the **Patient Profile** page to view any non-charted orders.

Discontinuing Non-charted Orders

To discontinue non-charted orders, complete the following steps:

1. Search for the patient whose non-charted orders you want to discontinue. The **Patient Search Results** page opens.
2. On the **Patient Search Results** page, click the patient's name to open the patient record. The **Patient Profile** page for the patient opens.
3. Scroll down toward the bottom of the page to find the non-charted orders(s) that you want to discontinue.
4. Click the checkbox in the Discontinue column for the non-charted orders that you want to discontinue.
5. After you have placed check marks for all the non-charted orders that you want to discontinue, click the **Discontinue** button.

Viewing Charted Orders

You can view charted orders at the bottom of the Patient Profile page.

To view charted orders, complete the following steps.

1. Search for the patient whose charted orders you want to view. The **Patient Search Results** page opens.
2. On the **Patient Search Results** page, click the patient's name to open the patient record. The **Patient Profile** page for the patient opens.

3. Scroll down toward the bottom of the Patient Profile page to view any charted orders.

Discontinuing Charters Orders

To discontinue charted orders, complete the following steps:

1. Search for the patient whose charted orders you want to discontinue. The **Patient Search Results** page opens.
2. On the **Patient Search Results** page, click the patient's name to open the patient record. The Patient Profile page for the patient opens.
3. Scroll down toward the bottom of the page to find the charted orders that you want to discontinue.
4. Click the check box in the Discontinue column for the charted orders that you want to discontinue.
5. After you have placed check marks for all the charted orders that you want to discontinue, click the Discontinue button.

Viewing Meds by Category

Meds (prescriptions) are divided into the following three categories that can be viewed separately:

- Routine Meds
- Treatment Meds
- PRN Meds

You can select and access these separate categories from the Patient Profile page.

To view any of the individual Med Categories, complete the following steps.

1. From the **Patient Search** page, search for the patient whose Med information you want to view. The **Patient Search Results** page opens.
2. Click the name of the patient. The **Patient Profile** page opens.
3. On the **Patient Profile** page, locate the link for the Meds category that you want to view.
4. Click Routine Meds, Treatment Meds, or PRN Meds. The list of Meds in the selected category is displayed.

Viewing Prescription Details

Prescription Details are viewed on the Prescription Details page. Prescription details describe specific information about the prescription as it was written for an individual patient, including the following:

- Prescription Number (RX #)
- Drug Name
- NDC:
- W/F Drug

- Strength
- Quantity
- Form
- Instructions
- Rx Diagnosis
- Med Type
- Doctor
- Refills Left
- Original Order Date
- Last Fill Date
- Date Written
- Hours of Admin

To view prescription details, complete the following steps:

1. From the **Patient Search** page, search for the patient whose prescription details you want to view. The Patient Search Results page opens.
2. Click the name of the patient. The Patient Profile page opens.
3. On the **Patient Profile** page, locate the prescription that you want to view.
4. Click the name of the prescription. The **Prescription Details** page for that prescription opens.

Viewing Drug Details

Drug Details are viewed on the Drug Details page. Drug details describes specific information about the drug including the following:

- NDC number
- Brand Name
- Generic NDC
- Brand ID
- Strength
- Brand NDC
- Narcotic Code
- Generic Name
- Units
- AHFS
- Form
- DT
- AWP (Average Wholesale Price)
- Generic ID
- Side Effects

There are two ways that you can access drug details:

- From the Drug Search page
- From the Patient Profile page

► To search for and locate a specific drug for which you want to view details from the **Drug Search** page, complete the following steps:

1. From the Home Page, click Drug Search. The Drug Search page opens.
2. In the **Search for** field, type the name of drug for which you want to search, and click **Search**. The Search Results page opens.

3. Click the name of the drug. The **Details** page opens showing the details of the drug.

► To search for and locate a specific drug for which you want to view details from the **Patient Profile** page, complete the following steps:

1. From the **Patient Profile** page, click the name of the drug for which you want to view details. The Prescription Details page for that prescription opens.
2. On the **Prescription Details** page, in the **Drug Name** field, click the name of the drug. The Details page opens showing the details of the drug.

Viewing Doctor Details

Doctor Details are located on the (Doctor) Details page. This page provides the following details about a doctor:

- Name
- DEA Number
- Phone
- Fax
- Address
- Doctors Comments

You can access Doctor Details from the following locations in the program:

- The Patient Profile page
- Doctor Search>Doctor List

To view Doctor Details, complete the following steps:

1. From the Patient Profile page, click the name of the doctor next to Primary MD or Secondary MD. The Physician Detail page opens.
or
From the Menu, click Doctor Search. The Doctor Search page opens. Click the name of the doctor. The Physician Detail page opens.
2. Review the information on the page.
3. To add or edit doctor comments, click Add/Edit Doctor Comments.

Discharging a Patient

To discharge a patient, complete the following steps:

1. From the Home page, search for the name of the patient that you want to discharge. The Patient Search Results page opens.
2. From the Patient Search Results page, click the name of the patient that you want to discharge. The Patient Profile page opens.
3. On the Patient Profile page, click Discharge Patient. The Discharge Patient page opens.
4. In the Discharge Date field select the date of discharge. The program automatically applies the current date; you can change the date to a different date.
5. In the Discharge Reason field, type the reason for discharge, then click Submit.
6. The Discharge Patient page displays the following message: *Patient Discharge for <Patient Name> was successful.*

Logging Out

To log out from the Facility Access Portal, click the Logout button. The Login page is redisplayed.

