# Table of Contents

Introduction to McKesson Clinical Programs Solution™ ........................................... 4

Building Clinical Programs ......................................................................................... 9

Steps to Building a Self-Directed Clinical Program: .................................................. 9

Getting Started with Program Builder ....................................................................... 10

Selecting a Program Logo & Icon ............................................................................. 10

Naming the Program & Entering a Program Description ............................................ 11

Choosing a Program Enrollment type ...................................................................... 11

Entering Therapeutic Program Codes ....................................................................... 12

Building Program Messages ..................................................................................... 14

Building Enrollment Forms ...................................................................................... 17

Modifying Program Enrollment Forms .................................................................... 20

Saving the Program .................................................................................................. 21

Activating Clinical Programs ..................................................................................... 22

Configuring Clinical Programs ................................................................................ 23

Steps for Configuring a Clinical Program .................................................................. 23

Getting Started with Program Configuration .......................................................... 24

Setting up Data Filters for Program Enrollments ...................................................... 24

Setting the Time Period to Re-ask Patients to Enroll ............................................... 34

Setting Data Filters for Program Messages ............................................................... 35

Saving Program Configuration .................................................................................. 37
Enabling Clinical Programs ........................................................................................................... 38
Receiving Messages in the CPS Messaging App ............................................................................. 39
  CPS Messaging App Actions ...................................................................................................... 39
    Viewing Messages .................................................................................................................... 40
    Enrolling Patients .................................................................................................................... 41
    Refusing Enrollment ................................................................................................................ 43
    Entering Follow-up Messages .................................................................................................. 43
    Resolving Program Messages .................................................................................................. 44
    Changing the Expiration Date or Message Severity ................................................................. 45
    Printing Messages ................................................................................................................. 45
Accessing Messages through the CPS Task Queue ..................................................................... 46
  Actions You Can Take in the CPS Task Queue ......................................................................... 46
    Filter Messages in the Task Queue .......................................................................................... 47
    Taking Action on Messages in the Task Queue ...................................................................... 48
Viewing the CPS Patient Profile .................................................................................................. 49
  Actions You Can Take on the CPS Patient Profile ................................................................... 49
    Recording New Patient Health Values .................................................................................... 50
    Viewing & Exporting Historical Patient Health Values .......................................................... 51
    Viewing & Editing Program Enrollments ................................................................................ 52
    Accessing the Patient-Specific CPS Task Queue .................................................................... 53
Introduction to McKesson Clinical Programs Solution™

McKesson Clinical Programs Solution™ (CPS) enables you to drive clinical interactions between your pharmacists and patients in order to provide your patients with better clinical outcomes. CPS is designed to be an integration platform which enables bidirectional communication between your pharmacy management system and vendors of patient care and wellness monitoring services.

CPS also allows you to create and configure your own Self-Directed programs to manage patient care, with prompts and messages integrated directly into your pharmacy workflow activities. For example, if you'd like to help patients quit smoking, you can use CPS to enroll patients, track progress, and remind pharmacists and other staff to check in with the patients and offering counseling on an on-going basis.

**Note:** Access points and screen displays in this document may be different based on your Pharmacy Management System.

**Features:**

**Connect With Service Providers of Specialized Patient Care & Wellness Programs**

CPS will alert you to a patient's eligibility to enroll in a vendor program specific to their needs and allow you to capture data to be transferred directly into the fields required by the vendor application.

Connect with vendors for programs such as:

- Specialty medication management
- Disease-state monitoring
Build Your Own Patient Care Management Programs

Build your own (Self-Directed) patient medication management and wellness programs that will automatically display messages and alerts to your pharmacists based on the criteria you define. Building the program is as simple as: adding and activating the program in the CPS Program Builder, and Configuring and Enabling the program in the CPS Program Admin.

Set up programs that will alert your pharmacists to take actions such as:

- Enroll a patient into a diabetes management program
- Provide counseling on the use of asthma inhalers
- Record the blood pressure of a patient with hypertension
- Gather patient feedback on medication side effects for specialty medication
- Advise patients 60 years and older to get the shingles vaccination
Stay Abreast of Program Enrollments & Messages During Workflow

The CPS Messaging App displays messages as they are triggered, letting your pharmacist take action on enrollments and alerts as they come in during workflow. These messages may also provide direct links to vendor websites when a pharmacy is using a licensed vendor program.

Take Action on Program Messages & Tasks Outside of Workflow

The Clinical Programs Task Queue gives you insight into all of the messages that have been received (for a configurable time period) so that you can take action on messages and enrollments outside of workflow. The messages displayed in this queue can be prioritized, according to the parameters you apply, so that you can deal with the most important messages first.
You can also use this queue to query for messages by patient or facility (either your facility or the facilities for which you do load balancing) as well as other options such as:

- Program Name
- Message Severity
- Message Type
- Date/Time Received
- Message Status
- Due Date
- Expiration Date

**Note:** Load balancing is not available for the Pharmaserv Pharmacy Management System.
Access Your Patient’s Clinical Program Data From Within the Patient Profile

The new CPS Patient Profile gives you a comprehensive, patient centric, view of everything you are doing for a patient to improve their wellness.

The CPS Patient Profile will show you all of the data that is captured from both Vendor and Self-Directed programs, in addition to the list of programs that the patient is enrolled in, or is eligible for. The CPS Patient Profile is your view into everything you are doing clinically for that patient. Note that the patient’s name displays in the window below when using Pharmaserv.

Use the Clinical Programs tab to view and act on patient information such as:

- The Standard Patient Health Values
- Program Enrollments
- Program Messages

In Pharmaserv, click the CPS patient vertical toolbar button in Pharmacy Maintenance to access this information.
Building Clinical Programs

The building and configuration of a Self-Directed Clinical Program is highly customizable. Depending on your needs, you may choose not to use all of the fields and options available to you. The steps below outline only one example of how a program can be built.

**Note:** Only Self-Directed programs need to be built in the Program Builder. Vendor Programs will be built by MPS&A.

**Steps to Building a Self-Directed Clinical Program:**

- Getting Started with Program Builder
- Selecting a Program Logo & Icon
- Naming the Program & Entering a Program Description
- Choosing a Program Enrollment Type
- Entering Therapeutic Program Codes
- Building Program Messages
- Building Program Enrollment Forms
- Modifying Program Enrollment Forms
- Saving a Program
Getting Started with Program Builder

To get started, navigate to the CPS Program Builder and click on the Add Program button.

Selecting a Program Logo & Icon

Program Logos and Icons are not required; however adding images will improve the visibility of the program in the Pharmacy Management System.
To Add a Program Logo: Click the Select a Program Logo button and follow the prompts to select the image file from the local hard drive. This logo will display at various places in the Pharmacy Management platform, such as the CPS Program Builder and the CPS Program Admin, and allow users to easily identify the program. The Program Logo image will be 250 pixels wide x 75 pixels high and the file format can be .gif or .png.

To Add a Program Icon: Click the Select a Program Icon button and follow the prompts to select the image file from the local hard drive. This icon will display in various places in the Pharmacy Management platform, including the CPS Messaging App, and allow users to easily identify the program. The Program Icon will display at 16 pixels wide x 16 pixels high and the file format can be in .gif, .png or .jpg.

Naming the Program & Entering a Program Description

A unique program name is required in order to save the program.

To Name the Program: Enter a program name into the text field, Program Name. This field is limited to 60 alphanumeric characters and no two programs can be saved with the same name.

To Enter a Program Description: Enter the program description into the text box, Program Description. The Program Description is not required; however, this text will display in the Program Builder, Program Admin, the CPS Task Queue and the CPS Profile, and describes the purpose of the program. This field is limited to 600 characters.

Choosing a Program Enrollment type

A Patient Enrollment program type will require users to ask the patient if they would like to enroll in the program, whereas, the No Enrollment program type will not require users to ask the patient for his/her approval to enroll in a program.
To Choose a Program Enrollment type: Use the Enrollment Type drop down menu to choose a Patient Enrollment type program or a No Enrollment program.

Note: You might choose No Enrollment for a one-time program where patient data collection is not necessary. For example, you might set up messages to remind the pharmacist to counsel patients the first time a certain medication is filled. You might choose Patient Enrollment for an ongoing program where you want to collect patient data. For example, you might want to provide ongoing counseling for patients with diabetes whenever they come in to pick up their Metformin refills.

Entering Therapeutic Program Codes

Therapeutic Program Codes can be entered in Program Builder to allow for the association of certain program codes to your program. Therapeutic Program Codes appear in the Program Enrollment dialog and capture additional data for the program during the enrollment process. Therapeutic codes are not required for the creation of a Self-Directed program.

Following are some examples which illustrate the use of Therapeutic Program Codes in Clinical Programs.

Therapeutic Program Codes Example #1
An example of Therapeutic Program Code use is a Hypertension Management Program, where the following codes were set up in Program Builder:

<table>
<thead>
<tr>
<th>Code Type</th>
<th>Code</th>
<th>Description</th>
<th>Data</th>
</tr>
</thead>
<tbody>
<tr>
<td>ICD-9</td>
<td>41.60</td>
<td>Primary Pulmonary Hypertension</td>
<td>Diovan 40mg</td>
</tr>
<tr>
<td>ICD-10</td>
<td>127.2</td>
<td>Other secondary pulmonary hypertension</td>
<td>Vasotec 40mg tab</td>
</tr>
</tbody>
</table>

The program could then be designed to require questions or data fields along with the Therapeutic Codes that need to be filled in order to complete an enrollment.

Therapeutic Program Codes Example #2
Another example could be a Pain Management Program administered by the Pharmacy. The Pharmacy may have existing plan data that they want to track and collect, or they might design something totally custom.

The custom code type could be any code, description, or data that the program requires. For example:
To Enter Therapeutic Program Codes:

1) Click the Program Codes button.

2) Click the Add Code button.
3) Choose whether the code is an ICD-9, ICD-10 or Custom Code in the Code Type drop down.

4) Enter the code in the Code field.

5) Enter a code description in the Description text box. This field is not required to save the code.

6) Enter the Data in the Data field with which you want to associate the therapeutic code, e.g., an NDC number or drug name, if you want to associate such with each ICD number. This field is not required to save the code.

Note: To enter more program codes, repeat steps two to six.

7) After all of the Therapeutic Codes have been entered, click OK.

Building Program Messages

Program messages are the messages that will be displayed to users and can prompt the user to have a patient interaction, e.g., provide counseling on dosing to the patient or gather patient vitals data.
To build program messages:

1) Enter a number from 1-999 in the **Message Expiration Setting** text box. This number will determine how many days the messages will continue to display in the CPS Messaging App. The system default for this field is seven days.

2) Click the **Add** button.
3) Choose whether the message type is **Standard** or a **Questionnaire** from the **Message Type** drop down.

**Note:** Program Builder will currently only allow for one questionnaire/enrollment form to be built within each program; however, users can enter more than one message of a message type of **Questionnaire**. Any messages you designate as a Questionnaire message type will display to the user before the form set up in the **Enrollment Form** section below displays. The system will allow for the triggering of the same form repeatedly, but with different 'message' text to the user. This is so that users can collect data on an ongoing basis, e.g., a diabetes monitoring program might require the user to ask the patient for their A1c on the initial enrollment form, but you may also want to trigger the same form again every three months to collect the A1c on an on-going basis. In this case the messages you set up to occur subsequent to the enrollment form might state "Ask the Patient if they have any new A1c results to report", whereas the initial enrollment form message would state "Ask the patient if he/she wants to enroll in a diabetes management program."

However, the same (questionnaire) form would display in either case.

If you choose a **Standard** message type, this will operate as a message to your user, but not trigger the questionnaire/enrollment form. You may choose this option in a situation where you want to remind your staff to counsel a patient on
his/her medication, but do not need to collect any data associated with this transaction.

4) Create the message text in the **Enter Message Text Here** field. The limit for this field is 8,000 characters.

5) Set message severity by using the **Message Severity** drop down. Messages displayed throughout the system will be prioritized based on the severity chosen here. Messages with a **High** severity designation will sort to the top in areas where all CPS messages are displayed, such as the CPS Task Queue and CPS Patient Profile.

6) If there is a need to have a particular message override the **Message Expiration Setting** above, enter the number of days from 1-999 in the **Message Expiration Setting Override** field.

**Note:** You may want to use this setting if you have more than one message and want the messages to expire at different times.

7) Once the message has been built, click the **OK** button and the system will return to the Program Builder overview page.

**Note:** Repeat steps 2-7 above until all of the program messages have been added.

---

**Building Enrollment Forms**

The enrollment form builder allows for the building of an enrollment form which will appear to users in workflow when a patient is eligible to enroll in the program. Forms are built by adding and customizing each field, one at a time.

**Note:** The terms “Enrollment Form” and “Questionnaire” are used interchangeably. A program can have only one form regardless of whether you’re using it as an enrollment form or questionnaire.
To build an enrollment form:

1) Click **Add Field**.

2) Use the **Field Type** drop down to select the field type. This selection will determine the rest of the options available in the field builder. The following field types are available in this drop down: Text Field, Text Box, Radio Button Group, Check Box Group, Separator, Number, Currency, Date and Time, Date, Time, Read Only Text Box, Text Box and Special Key. The example below shows the options the user will see if the 'Text Field' field type option has been selected.
3) Type in the label for the field into the Field Label field.

4) Enter the key value in the Key field.

Note: The Key field lets the user assign a key value to the field that could refer to something like a database key value for the program. The system will auto-generate a key value if no value is entered into this field.

5) Use the Default Value field to select a default value. This field is not required.

6) Use the Program Retention drop down to select whether or not the data in this field will save to the patient profile.

7) If desired, use the Make Field Required check box to make the population of this field required in order to save the form.

8) Enter a group name for the field in the Group Name field.

Note: Use the Group Name field for designing a form where questions are 'grouped' together under a common header, e.g., grouping all blood work fields under the group name "Diagnostics." This field is not required.

9) Click the OK button to add the field to the enrollment form.

To add more fields to the form, return to step one above and repeat the remaining steps as applicable to the field type.
Modifying Program Enrollment Forms

After inputting all of the form fields, modifications can be made to the form by using the buttons located at the bottom of the Enrollment Form Builder.

**Program Preview:** Preview the form by using the Program Preview button to ensure the form has been built correctly.

**Moving Fields:** Change the order of the fields by selecting the row of the field to be moved and using the Move Up or Move Down buttons.

**Edit Field:** Change any of the field options set in the exercise above by selecting the field and using the Edit Field button.

**Remove Field:** Remove a field entirely by selecting the field and using the Remove Field button.
Saving the Program

Finally, save your program by clicking on the "Save" button at the bottom of the Program Builder page.

Once you've finished Building your program you're ready to move on to "Activating Clinical Programs."
Activating Clinical Programs

After building a Self-Directed program, the next step is to activate it.

To activate the program in the Program Builder:

1) Type the program name into the Filter By text box.

2) When the program displays in the list, click the Activate button.

After activating the program the next step is to configure it. Go to "Configuring Clinical Programs" to continue.
Configuring Clinical Programs

After a Program has been built and activated, the next step is to configure it. This is where the triggers for messages will be set up for the program, i.e., configure what data input by the user will cause a CPS program message to be displayed in the system. For example, when a certain NDC is filled the program will display a message to the user.

Note: This is also the area in which triggers for a vendor program will be set up. The instructions below will not give you specific details about the filters you need to set up for vendor programs, but it will outline how filters are set up in general. Contact the vendor directly to configure the specific filters needed for a vendor program.

Steps for Configuring a Clinical Program

- [Getting Started with Program Configuration](#)
- [Setting up Data Filters for Program Enrollments](#)
- [Setting the Time Period to Re-ask Patients to Enroll](#)
- [Setting up Data Filters for Program Messages](#)
- [Saving Program Configuration](#)
Getting Started with Program Configuration

1) Type the program name into the **Filter By** text field.

2) Select the **Configure** button next to the program when it displays in the list.

Setting up Data Filters for Program Enrollments

The data filters in the Patient Enrollment portion of the screen are the filters you set up to determine the enrollment criteria for your program. When the criteria have been met, an enrollment message will be triggered during workflow.

- \( = \) (filters for items with a value that is equal to the value entered in the **Value** field)
• != (filters for items with a value that is not equal to the value entered in the **Value** field)
• <= (filters for items with a value that is less than or equal to the value entered in the **Value** field)
• >= (filters for items with a value that is greater than or equal to the value entered in the **Value** field)
• < (filters for items with a value that is less than the value entered in the **Value** field)
• > (filters for items with a value that is greater than the value entered in the **Value** field)
• IN (filters for items that match the value/s defined in the **Value** field)
• NOTIN (filters for items that do not match the value/s defined in the **Value** field)
• STARTS WITH (filters for items that start with the value entered in the **Value** field)

**TIP**
For Self-Directed programs you’ll be making your own decisions on what your filters include. Below is an example of a simple filter and a couple of more complex filters to give you an illustration of some of the different options available.

**Simple Filter Example**

First, we will set up a very simple filter, which will trigger an enrollment when one specific NDC is filled:
1) Click the **Edit Data Filter** button to get started configuring the data filters.
2) Use the **Data** drop down to choose the data which, when the user inputs it into the system, will trigger the enrollment message. In this example we've used **Written Product**.

3) Next, use the **Attribute** drop down to choose an attribute. The input made in the **Data** field in step two will determine the available options in the drop down menu. For this example we've used the attribute **NDC Number 11 digits**. **Note:** Some attributes are specific to individual pharmacy management systems and may not be relevant to your system.

4) Choose the **Operator**. In this example we want to trigger an enrollment for our Asthma monitoring program every time certain types of inhalers are filled and have chosen the '=' operator here.

5) Enter the value into the **Value** field.

    If you've selected an NDC number for the attribute and you aren't sure of the exact number, you can use the magnifying glass icon to look up the particular NDC number. This search will operate the way any other NDC search operates within the Pharmacy Management System. Note that this functionality is not currently available in Pharmaserv.
6) Check the blue text box above your data filter and ensure that your filter has been configured correctly and click the OK button when you are satisfied with your filter. **Note:** Click the Undo Changes button to clear any changes you’ve made to the data filter.

The following are some examples of more complex filter setups:

**Complex Filter Example #1**

Now we will set up a more complex filter. If for example you want to create a program which will trigger an enrollment for either one of two NDCs, after you complete steps 1-5 above, do the following:

1) Select the drop down arrow in the Connector field and scroll to OR.

2) Select the Add Row button and repeat steps two through 6 of the "Simple Filter Example" instructions above.

**Complex Filter Example #2**

The following is an example of a program filter setup with even more complexity. For this example we are setting up a filter which will trigger enrollment for a patient when either one of two NDCs are filled AND the patient is pregnant. This is a situation in
which you will have to insert parenthesis in the appropriate fields. Subsequent to following the instructions above on "Complex Filter Example #1", complete the following steps:

1) Select the Add Row button.

2) Select the drop down for Connector and choose AND.

3) Insert the open and closed parenthesis as shown in the image above.

4) Insert the row fields as appropriate. For this example we've used: Patient in the Data field, Pregnancy Indicator in the Attribute field, = in the Operator field, and 2 – Pregnant in the Value field.

5) Select the OK button to save your filter.

**Adding an Array of Values with the IN and NOTIN Operators**

When using the IN and NOTIN operators in a data filter, you can add an array of values by individually adding each value, or you can add multiple values at a time by importing a comma-separated values (CSV) file.
1) On the Data Filter screen, select IN or NOTIN from the **Operator** drop down.

**Note:** The IN and NOTIN operators are not supported for the following attributes:
- For the **Patient** data element: *Enrolled Programs, Non Enrolled Programs, Codes, Additional Data, Patient Groups, Allergy Codes*, and **Age**
- For the **Prescriber** data element: *Prescriber ID Qualifiers*
- For the **Written Product** and **Dispensed Product** data elements: **Product Groups**

2) In the **Value** field, click the ellipsis (...) to open the **List** dialog screen.
3) Click the Add button to add new individual values to the list.

4) Enter the **Value** and **Description** (optional) for each item in the list.
5) To upload multiple values at once using a CSV file, click the Import button. **Note:** Using the Import button to import a CSV file will override any existing items in the list. Alternatively, you can use the Append button to import a CSV file. Using the Append button does not overwrite any existing list items and will add the new values at the end of the list.

**Note:** The format of the CSV file is a value and description on each line, separated by a comma. The header format of the CSV file needs to match the field names on the List dialog. For example:

```
Value, Description
OH, Ohio
PA, Pennsylvania
NJ, New Jersey
```

6) Select the CSV file and click Open to add the items from the file to the list.
7) To remove an individual item, select the check box next to the item and click the **Remove** button.

8) When you are done making changes, click **OK** to return to the Data Filter screen.

**Note** (for Pharmaserv users): For Pharmaserv, some data filters are either invalid or need to be set up differently to meet enrollment criteria.

Data filter values that display the magnifying glass icon cannot be viewed for Pharmaserv. Data must be entered exactly as it displays in Pharmaserv for criteria to be met for enrollment messages (note that the match is case sensitive).

Some data filter attributes are not valid because this information does not exist in Pharmaserv, so enrollment criteria will not be met. This includes the following data filter – attributes:

- Patient data filter – Patient Groups, Terminally Ill, and Allergy Code attributes
- Facility data filter – Facility Type attribute
- Fill Level data filter – Item Source and Delivery Option attributes
- Prescriber data filter – Specialty 1, Specialty 2, and Specialty 3 attributes

In addition, the following differences exist with Pharmaserv (with respect to valid enrollment criteria):
• For the Patient – Gender Code data filter attributes, valid codes in Pharmaserv are Male, Female, and Other.
• For the Rx – Rx Status data filter attributes, valid codes in Pharmaserv are Active, Profile, Deleted (Cancelled), and Transferred.
• For the Fill Level – Third Party name data filter attributes, the CPS value is a free text field. You MUST enter data exactly as it displays in Pharmaserv. For cash claims, you need to enter Cash; for AR charge claims, you need to enter Charge.
• When using the Product Groups attribute, you must populate the Value field with the information found in either the Clinical Category Group or Clinical Category Class field for the type of item. This information displays on the Clinical Information window of Item Maintenance in Rx Processing. It must be entered exactly as it displays in those fields.

**Setting the Time Period to Re-ask Patients to Enroll**

If an enrollment message is triggered and the pharmacist asks the patient if they would like to enroll in a program, but they decline, they may want to ask the patient again sometime in the future. Users can select a numeric value (1 through 12) from the Time Period (in Months) Before Asking a Patient to Enroll Again dropdown to define when they should follow-up with the patient about enrolling in the program. If the patient does not want to be asked about enrollment in this program again, users can select 999 from the dropdown.
Setting Data Filters for Program Messages

Next, you will need to configure the data filters for what criteria needs to be met in order to display the program messages set up in the Program Builder. The system should display any messages that have been set up in Program Builder in this area.
Note: You will need to edit data filters separately for each message that you set up in the Program Builder.

1) To get started, select the Edit Data Filter button next to the first message for which you want to edit the data filter.

2) The data filters in this area work exactly like those that we set up for the enrollment message. Follow the steps in either the "Simple" or "Complex" data filter examples above to configure each of the program messages triggers.
Saving Program Configuration

Once you've finished configuring all of the enrollment and program message filters, click the **Save** button.

![Configuring Clinical Programs Solution](image)

Now you're ready to enable the self-directed program. Go to the chapter "Enabling Clinical Programs" to finish the program.
Enabling Clinical Programs

After you have configured your Self-Directed Program the last step is to enable it. This is where the program needs to be activated so that it can be utilized by users. Until the program is enabled, messages and enrollments will not be seen by users.

To Enable a Program:

1) Type the program name into the Filter By text box.

2) Once the program displays in the list, click on the Enable button.

The Clinical Programs Solution Admin screen is also a place where you can get a snapshot of how many patients are enrolled, are pending enrollment, have un-enrolled, have declined, or (for vendor programs) the vendor has rejected. See the area circled in red in the image above for this information.

Now the program is ready to display messages. Messages will appear in the CPS Messaging App, the CPS Task Queue and the CPS Patient Profile, when the filter criteria have been met.
Receiving Messages in the CPS Messaging App

Once a program has been built, activated, configured and enabled, CPS messages will display when the criteria set in the CPS Admin has been met. This chapter will outline how program messages will display during workflow, and the actions that can be taken on these messages.

For this example, we are using a program which was set up to send enrollment messages upon the filling of a certain NDC number, and other messages once the patient has been enrolled and subsequently refills the same NDC. In this scenario, after we fill an Rx with the matching NDC number from our filter and move it forward out of Data Entry, our enrollment message will be triggered. In EnterpriseRx, the first indication of this enrollment message is in the task bar in the CPS Messaging App. For Pharmaserv, the CPS Messaging App window must be open to view any messages.

Note: During downtime or a network outage, the CPS Messaging App will display a communication error upon any user action, such as searching for a patient. This error message will disappear following the next user action that does not result in a communication error.

CPS Messaging App Actions

- Viewing Messages
- Enrolling Patients
- Refusing Enrollment
- Entering Follow-up Messages
- Resolving Messages
- Changing the Expiration Date or Message Severity
- Printing Messages
Viewing Messages

When a new CPS message is available, the task bar area of EnterpriseRx containing the CPS Messaging App header will change colors. In Pharmaserv, the CPS Messaging App will pop-up automatically in the foreground when a patient is in context and that patient has messages to display.
When the message displays, any of the following five different actions can be taken: Enroll, Refuse, Follow-up, Resolve or, if we click on the ellipsis we can view/change the expiration date or message severity.
Enrolling Patients

We can now enroll the patient into the program using the enrollment form we set up earlier in Program Builder. In order to enroll your patient:

1) Click on the Enroll button in the Enrollment Message. The system will display the enrollment form set up in Program Builder in a similar manner as the form below.
2) When the enrollment form displays, complete the required fields and click the Submit button at the bottom of the form.

**Note:** Enrolling a patient in a program will override any setting in place in the system where the user has set a “Do Not Contact” flag for the patient.

**Refusing Enrollment**

If the patient is asked about enrolling in the program and he/she refuses, select the Refuse button. The system will not send an enrollment message again for this patient for this particular program until the time period you set up in CPS Patient Admin has been reached.

**Entering Follow-up Messages**

The Follow-up button allows users to leave a comment to remind themselves, or someone else, to follow-up on messages. This may be useful in situations where the patient has not given a definitive answer about whether or not he/she is interested in
enrolling in the program and it is necessary for your staff to follow-up with them again sometime in the future.

After the follow-up message has been saved, this message will appear under the original enrollment message in the CPS Messaging App with the prefix "Re:", as shown in the image above. Users can then click on the follow-up message and it will expand so that it is visible.

**Resolving Program Messages**

If the user has already enrolled or refused enrollment for a patient, he/she can use the "Resolve" button to clear the message so that it will stop displaying in the CPS Messaging App. When a message is resolved, the user can also enter a Resolve comment. After this comment has been saved it can only be viewed again by generating a report through Data Warehouse or Reports Director in EnterpriseRx,
should the user have access to these areas. Note that Data Warehouse and Reports Director are not available in Pharmaserv.

**Important:** If a questionnaire has been created, Pharmaserv users must both answer and resolve the questionnaire to properly resolve a CPS program message. See Building Program Messages for more information on creating a questionnaire.

**Changing the Expiration Date or Message Severity**

Selecting the Ellipsis button will allow you to change the expiration date or severity of a particular message which will override the message settings for expiration and severity that you set up in the CPS Program Builder.

**Printing Messages**

**Note:** Printing messages through the CPS Messaging App is currently only available for use with Pharmaserv. One message can be printed at a time.

Click the Print button for a message in the CPS Messaging App to print that given message. The printed message will contain information about the selected program, store, and patient, in addition to the text of the message itself.
Accessing Messages through the CPS Task Queue

In addition to being able to see CPS program messages as they come in during a workflow step, users can view these messages at any time in the CPS Task Queue and in the CPS Patient Profile. This chapter covers the CPS Task Queue and actions you can take therein on CPS messages.

The CPS Task Queue is a centralized view of all of the unresolved messages that have come in for patients, both in your local store and - if you do load balancing for another store - the stores in your extended view. Messages will continue to populate in this queue until they have been 'resolved' by a user. Note that load balancing is not available in Pharmaserv.

The default display of messages within the CPS Task Queue will comply with the home facility of the user who is logged in to EnterpriseRx (in Pharmaserv, this default display just refers to the individual store’s messages). Messages in this queue will be sorted according to the following schema:

- Last Name, First Name (in ascending order)
- Date of Birth (in ascending order)
- Program message severity (in descending order)
- Date the message was received (from most recent to the oldest)
- Program Name (alphabetically)

Actions You Can Take in the CPS Task Queue

- Filter Messages
- Take Action on Task Queue Messages
Filter Messages in the Task Queue

When the CPS Task Queue is opened, the default view will display every message - for the home facility of the logged-in user - that has not yet been resolved. Because this could be a very large number of messages, the system allows users to filter the messages by any of the following: Program Name, Patient Name, Message Severity, Message Type, Date/Time, Patient Date of Birth, Message Status, Due Date, Store Number, Patient Phone Number, Message Text and Expiration Date.

1. Enter search criteria into the corresponding text box.

2. Click the Filter button.

Note: The Store Number text box will default to show the store data for the store at which you are logged in. You can change the store number to a store for which you are load balancing if you load balance CPS messages for that store, or use the comma separator and add multiple stores to the filter. For Pharmaserv, the Store Number text box displays the Store’s NABP number.
Taking Action on Messages in the Task Queue

After the messages have been filtered, double click the message and the message dialog will display. The message may look similar to the image below.

From here, users can choose to take any one of the same five actions as available in the CPS Messaging App: Enroll, Refuse, Follow-up, Resolve or use the ellipsis button to change expiration date or message severity.

**Note:** Different types of messages will display differently in the Task Queue. Some messages, like vendor activity messages, will contain hyperlinks for the user to connect to the vendor site for greater patient and program detail.
Viewing the CPS Patient Profile

In addition to viewing messages within the CPS Messaging App and Task Queue, users can also view a patient's particular CPS information directly from the patient profile through the "Clinical Programs" tab. This tab not only provides information on Program Enrollments and Program Messages, but also allows users to record and view Patient Health Values and export these values to a .csv file.

Actions You Can Take on the CPS Patient Profile

- Recording New Patient Health Values
- Viewing & Exporting Historical Patient Health Values
- Viewing & Editing Program Enrollments
- Accessing Patient-specific CPS Message Task Queue
Recording New Patient Health Values

The 'Standard Patient Health Values' area will display the most recent health values collected for the patient. In order to record new Patient Health Values:

1. Click the **Edit** button.

2. Enter the patient health value or values in the available value fields. In this example we're entering a value in the A1c mg/dl field.

3. Click the **Save** button.
Viewing & Exporting Historical Patient Health Values

Scrolling down the screen from the current Patient Health Values, historical values collected for the patient can be viewed. In this area, users will also see any custom values which were collected via an enrollment form or questionnaire.

In the example above, in addition to the A1c we populated earlier, the values which were recorded on the enrollment forms and questionnaires can be seen, such as the number of times per day the patient uses the rescue inhaler or the frequency of symptoms. There is also an Export button available here which will allow for the export all of the Patient Health Values to a .csv file.
Viewing & Editing Program Enrollments

To view Program Enrollment status for the patient, select the Program Enrollment tab.

When the Program Enrollment tab opens up, users will see every Self-Directed and vendor program which is currently in use for patients at the facility to which he/she is logged in. From here, the user can:

1. Access links to external websites including Program Website, Patient Website or a link to a custom website which can be indicated when building a program.

2. View Enrollment details and enroll or unroll in the patient using the buttons in the Patient Status column.

Because this could be any number of programs, the system will allow you to filter by the following options to narrow down your list:

- Program Name
- Program Status
- Patient Status
As soon as the user starts typing into one of these filter fields, the list of programs displayed will be narrowed.

**Note:** For **No Enrollment** programs, the **Patient Status** column will indicate that no enrollment is required, and you can use the **Patient Website** link in the **External Vendor Links** column to access additional information through the vendor site.

### Accessing the Patient-Specific CPS Task Queue

Within the CPS Patient Profile, the system allows you direct access to the CPS Task Queue to view program messages. To access the Task Queue, click the **Program Messages** tab.

When the Task Queue has been accessed from the CPS Patient Profile, the list of CPS messages will automatically be filtered on the patient from whom you accessed the queue, as shown in the image above.

From here, users can do work within the Task Queue exactly as described in the "Accessing Messages Through the CPS Task Queue" chapter.
Configuring Patient Communications Programs

Patient Communications allows you to better communicate with your patients, through certified vendors that support communication methods (e-mail, text message, phone call, mobile application) and notify your patients with refill reminders, pick-up reminders, and more.

**Note**: Patient Communications is only available for use with EnterpriseRx (version 7.0 and higher). Vendors are only available if certified. Currently, AIS and mscripts are the certified vendors. If your vendor is not on this list, contact McKesson to certify the vendor.

Steps for Configuring a Patient Communications Program

- [Getting Started with Patient Communications Program Configuration](#)
- [Setting Up Vendor Messages](#)
- [Changing a Vendor URL](#)
- [Setting Up Pick-Up and Refill Reminders](#)
- [Setting Up On Demand Messages](#)
- [Accessing On Demand Messages in the CPS Messaging App](#)
- [Enrolling Patients in Patient Communications](#)
Getting Started with Patient Communications Program Configuration

To configure a Patient Communications program, navigate to the CPS Program Admin screen and click the **Configure** button next to the Patient Communications program you want to configure.
On the configuration screen for the program, click the **Program Settings** button.

**Setting Up Vendor Messages**

From the **Vendor Messages** tab, you can select the preferred vendor for each communication type (e-mail, text message, voicemail, and mobile application). You can also create and remove display messages and specify the vendor and display message you want to use for each system event. Display messages are user defined messages assigned to workflow system events in your Pharmacy Management System that are sent to the selected vendor(s) when an Rx passes the selected system event(s) (for example, data entry or product dispensing). The vendor(s), in turn, communicates these messages to the patient. **Note:** To use this functionality, you also need to set up basic data filters for enrollment messages. For more information, see [Setting up Data Filters for Program Enrollments](#).
1) In the Vendor Communication Types section, select the preferred vendor for each communication type from the drop down menus. If you do not specify a vendor for a communication type, patients will not receive messages through that communication type. A vendor can be used for more than one communication type but only one vendor can be selected for each communication type. **Note:** As you make selections in the Vendor Communication Types section, the Vendor Message Types table updates to display a column for each vendor.

2) Click the Manage button to manage your display messages. The Display Messages – Management dialog appears.
3) Click the **Add Display Message** button to add a new display message. A new row appears at the bottom of the display messages list.

4) Enter your display message text in the **Message Name** field.

5) Click the **Save** button to add your new display message. You can continue adding additional display messages by repeating steps 3-5.

6) To remove a display message(s), select the checkbox(es) for the display message(s) you want to remove, then click the **Remove Selected Display Message(s)** button. Note that you cannot remove a display message that is already mapped to a system event; you will need to remove this association before you can remove the display message. Removing a display message impacts all existing patients enrolled in your Patient Communications program by deleting all patient preferences and records.

7) Click the **Close** button to save any changes and return to the **Vendor Messages** screen.
8) Based on the selected vendor communication types, the Vendor Message Types table changes to display a column for each vendor. Use the checkboxes to set the desired vendor(s) for each system event where you want a display message to appear. Note that these system events are based on the workflow activities in your Pharmacy Management System.

9) Use the Display Message drop down to select the desired display message for each system event where you want a display message to appear.

When you are done making edits on the Vendor Messages tab, click the Save button to save your changes.
Changing a Vendor URL

The **Vendor Configuration** tab displays the list of available vendors. From this screen, you can modify the vendor URL (the endpoint used to send messages to a vendor). **Note:** Changing the vendor URL overrides the vendor configuration that was created when the vendor was set up.

1) Click the **Configure** button next to the vendor you want to configure.
2) Modify the **Vendor URL** field.

3) Click the **Save** button to save your changes, or the **Cancel** button to return to the previous screen without saving any changes.
Setting Up Pick-Up and Refill Reminders

From the **Reminders Configuration** tab, you can set the auto-notification settings for pick-up reminders and refill reminders. Pick-up reminders are sent when a patient’s order is past due for pick-up in the store, and refill reminders are sent to remind a patient that a refill is due.

1) In the **Pick-Up Reminder** section, define the following auto-notification settings for pick-up reminders:

- Auto-Notify the Patient the first time after (x) days.
- Repeat Auto-Notification every (x) days after that.
- Stop Auto-Notification after a total of (x) days.
Note: You must enter values in all three fields if you want to configure pick-up reminders. You cannot save your changes unless all three fields have been populated. If you do not enter any values in these fields, pick-up reminders are not configured and will not be sent to patients.

2) In the Refill Reminder section, define the following auto-notification settings for refill reminders:

- Auto-Notify the Patient (x) days before the refill is due.
- Repeat Auto-Notification every (x) days after that.
- Stop Auto-Notification after a total of (x) days.

Note: You must enter values in all three fields if you want to configure refill reminders. You cannot save your changes unless all three fields have been populated. If you do not enter any values in these fields, refill reminders are not configured and will not be sent to patients.

3) Click the Save button to save your changes. If you do not want to save your changes, click the Cancel button to discard your changes.
Setting Up On Demand Messages

Patient Communications also allows you to define custom messages to send to your patients, called On Demand Messages. From the On Demand Messages tab, you can add, edit, and delete On Demand Messages.

1) To filter the list of existing On Demand Messages, enter a message name in the Filter By field.

2) Use the Edit and Delete buttons to edit or delete an existing On Demand Message. Clicking Edit opens the Edit On Demand Message screen (similar to the New On Demand Message screen, below) where you can edit the Message Name and Message Text for the selected On Demand Message.

3) Click the Add On Demand Message button to open the New On Demand Message screen.
4) Enter a name for this new On Demand Message in the **Message Name** field.

5) Enter appropriate text in the **Message Text** field. This is the text of the message that will display when it is sent.

6) Click the **Save** button to save your new On Demand Message. You can also click the **Cancel** button to return to the previous screen without saving the message.
Accessing On Demand Messages in the CPS Messaging App

1) Open the CPS Messaging App and in the messaging tray at the bottom of the app, click the Patient Communications icon 🔄 to open the On Demand Message App. For more information on the CPS Message App, see Receiving Messages in the CPS Messaging App.

2) Begin typing the desired message to filter the list. The message text will auto fill in the field.

3) Select the message from the list.
4) Click the **Send** button to send the selected message. You can then continue sending additional messages if necessary. Newer messages appear at the top of the app. **Note:** These messages are retained in the On Demand Message App for seven calendar days.

5) When you are finished, you can click the “X” to minimize the app. You can also select the CPS icon in the messaging tray at the bottom of the app to return to the main CPS Messaging App.

**Note:** The On Demand Message App displays the On Demand Message(s) for only the last patient in context.
Enrolling Patients in Patient Communications

Patients are enrolled in Patient Communications programs the same way they are enrolled in other CPS programs, through the **Clinical Programs** tab of the Patient Profile. For more information on viewing and editing program enrollments in CPS, see [Viewing and Editing Program Enrollments](#).

Select the “Program Enrollment” tab and click the **Enroll** button next to the Patient Communications program to open the Patient Communications enrollment screen.

**Note:** You can also access the Patient Communications enrollment screen through the CPS Messaging App by clicking the **Enroll** button for a Patient Communications program. For more information on enrolling patients in CPS programs through the CPS Messaging App, see [Enrolling Patients](#).
The top section of the screen, **Communication Preferences**, allows you to select a patient’s preferred phone number for text messages and voicemail messages (this can be the same phone number for both or different phone numbers) and their preferred e-mail address for e-mail messages using the **Patient Communication Options** drop down menus for each communication method.
The bottom portion of the screen, Notification Setup, allows you to select the preferred communication method for On Demand Messages, Pick Up Reminders, Refill Reminders, and any additional display messages you have configured using the Communication Preference drop down menus. Note: If you do not have any additional display messages configured, this list will just display On Demand Messaging, Pick Up Reminder, and Refill Reminder. The Vendor Supported Preferences column displays the communication methods supported by the vendor for each display message.

When you are done making any updates, click the Save button to save your changes, or the Cancel button to discard your changes and close the enrollment screen.

After enrolling a patient in Patient Communications, note that the Enroll button on the Program Enrollment tab of the Patient Profile Clinical Programs tab changes to Unenroll and a Configure button appears.
Clicking the **Configure** button allows you to edit the communication preferences and notification settings you defined for this patient. Clicking **Unenroll** will unenroll the patient from the program. **Note**: When you unenroll a patient, no Patient Communications program preferences or records are retained for the patient.