



# Single Patient Mode Training Manual






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# Definitions

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

# Overview

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

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

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

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

# Logging In

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

The screenshot shows the Rcopia Patient Info screen for a patient named "Patient Demo". At the top, there is a header bar with the patient's name, date of birth (01/01/1979), sex (Male), and age (38 years). A "Create New Prescription" button is visible. To the right, there is an "ENCOUNTER" section with a star icon and a calendar icon. Below the header, there are two red warning messages: "No drug allergies have been entered for the patient. Drug allergy details are important for detecting potential adverse reactions as prescriptions are written. Please confirm this patient's allergies." and "No pharmacy is selected for this patient. Please set the default pharmacy." The main content area is divided into several sections: "Patient" (with fields for SEX, DOB, HOME PHONE, ADDRESS, and PHARMACY), "Medications" (with "Active Medications" and "Medications Not Entered" sections), "Allergies" (with "Active Allergies" and "Allergies Not Entered" sections), and "Diagnoses / Problems" (with "Active Diagnoses" and "Diagnoses Not Entered" sections). There are also buttons for "Show Details", "Modify", "Delete Patient", "Provider Clinical Report", and "Patient Clinical Report".

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

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

# Patient Info Screen

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

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

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

**Patient Demo** | 01/01/1979 | Male | 38 years [Create New Prescription](#) ★ ENCOUNTER

No drug allergies have been entered for the patient. Drug allergy details are important for detecting potential adverse reactions as prescriptions are written. [Please confirm this patient's allergies.](#) ×  
No pharmacy is selected for this patient. [Please set the default pharmacy.](#) ×

### Patient

**Patient Demo**

SEX	DOB	HOME PHONE	ADDRESS
Male	01/01/1979	(301) 231-9510	Damascus, MD 20872

PREFERRED LANGUAGE: None specified

Patient Consent:  Yes  No

PHARMACY: Click icon at right to select a pharmacy

PRESCRIPTION BENEFIT: No Prescription Benefit Available

[Provider Clinical Report](#) [Patient Clinical Report](#)

[Show Details](#) [Modify](#) [Delete Patient](#)

### Medications

Active Medications Review Status: Unknown or Incomplete

Medications Not Entered

[Add Medication](#) [Show Medication History](#)

### Allergies

Active Allergies

Allergies Not Entered

[Add Allergy](#) [NKDA](#)

### Diagnoses / Problems

Active Diagnoses

Diagnoses Not Entered

[Add Diagnosis](#) [NKD](#)

## Practice Information

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

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

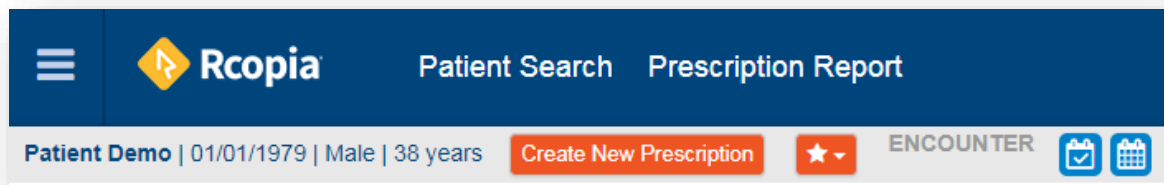
Be sure to always review this prior to prescribing for your patient to ensure the correct practice information displays on the prescription heading.

## Patient Demographic Information

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

## Encounter Information

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



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

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

**Patient Encounter Management** ← Back

Rendering Provider: Aaron, John Wendel  
 Date: 08/17/2017  
 Transition of Care:   
 Amendment:   
 Source: patient  
 Status: pending

**+ Add Encounter**

**Previous Encounters**

Encounter Date	Transition of Care	Rendering Provider	Amendment(s)	Action
08/17/2017		John W Aaron, III		

## Pharmacy Information

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

## Prescription Benefit

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

## Pharmacy Messages

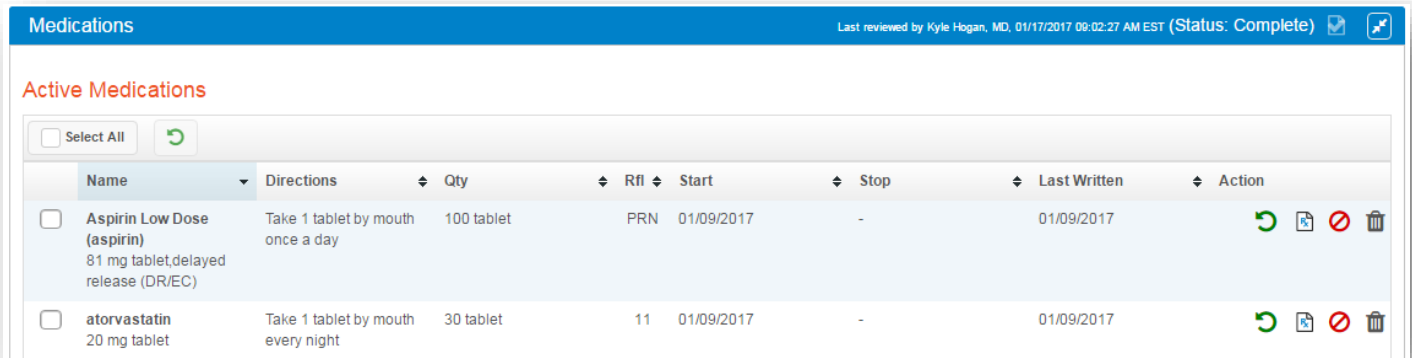
The practice's renewal requests from pharmacies can be accessed on any screen in Rcopia 4 by clicking the **Pharmacy Message** Icon on the top right of the screen or accessing the **Pharmacy Message** section within the patient record.

## Create New Prescription

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

## Medications

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



Name	Directions	Qty	Rfl	Start	Stop	Last Written	Action
<input type="checkbox"/> Aspirin Low Dose (aspirin) 81 mg tablet, delayed release (DR/EC)	Take 1 tablet by mouth once a day	100 tablet	PRN	01/09/2017	-	01/09/2017	
<input type="checkbox"/> atorvastatin 20 mg tablet	Take 1 tablet by mouth every night	30 tablet	11	01/09/2017	-	01/09/2017	

## Allergies

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

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

## Diagnoses/Problems

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

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

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

## Prescription Management

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

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

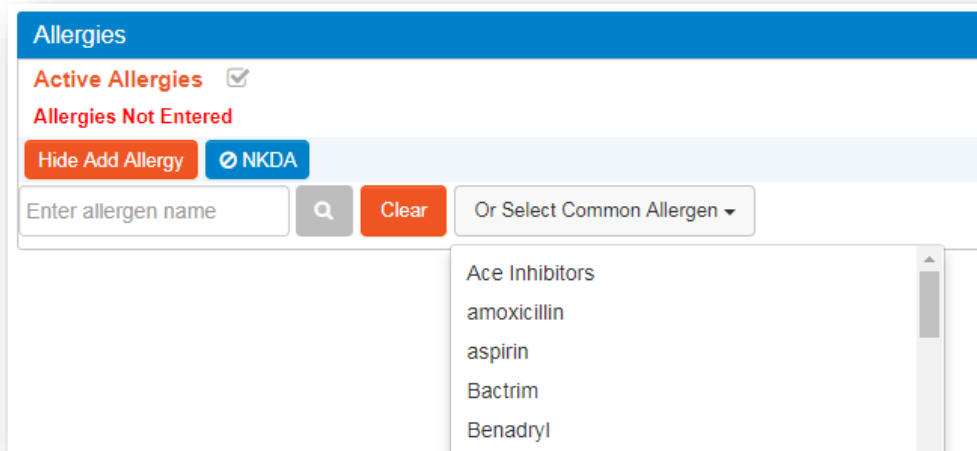
## Allergy Management

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

1. To add an allergy, click on the **Add Allergy** button.



2. Enter the allergies by one of the methods outlined below.
  - a. **No Allergies:** If the patient has no known allergies, click the **NKDA** button.
  - b. **Common Allergy:** Select a common allergy from the **Select Common Allergen** drop-down menu and click on the appropriate name to add it to the patient's record.



- c. **Searchable Drug Allergy:** Search for your patient's allergy, then select the appropriate allergy.

Allergies

Active Allergies

Allergies Not Entered

Hide Add Allergy  NKDA

Lipitor (atorvastatin)    Or Select Common Allergen ▾

Showing 1 - 0 of 0 results for "Lipitor (atorvastatin)" - Select a medication to add to allergy list

Matching Allergen / Group	Related Group(s)
Lipitor (atorvastatin)	Statins-Hmg-Coa Reductase Inhibitors

Enter free text "Lipitor (atorvastatin)" as allergy

- d. **Non-Drug-Related Allergy:** For any non-medication allergies, search for the allergy and click the **Enter free text** link to add the allergy.

Allergies

Active Allergies

Allergies Not Entered

Hide Add Allergy  NKDA

peanuts    Or Select Common Allergen ▾

There are no drugs whose generic or brand names begin with or contain "peanuts"

Enter free text "peanuts" as allergy

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

3. After you select the desired allergy, choose a reaction (if known) by either selecting a pre-populated reaction within the **Reaction** drop down menu, or by manually typing the reaction in the free text area on the right-hand side.
4. If you would like to specify a **Severity** for the allergy, select an appropriate severity from the Severity dropdown.
5. If you would like to enter the onset date for the allergy, select the appropriate date from the drop-down options, or click the **Today** button to add today's date.

6. Once complete, click the **Save** button.

**Add Allergy**

amoxicillin

Reaction <sup>▲</sup>

Chosen Reactions (May Freetext)

Add reaction from list at left

Severity

Onset Date

Note: Dates valid only if between patient DOB and current date.

Year Month Day Today

Save Cancel

7. Repeat the previous steps for each allergy.
8. Once you have entered all allergies for the patient, you can mark the allergies as reviewed by clicking the check box in the upper right-hand corner of the **Allergy** widget.

**Allergies**

Active Allergies



↕ Allergy	↕ Reaction	↕ Onset Date	↕ Date Entered	Actions
amoxicillin	Severe: Angioedema	-	06/20/2018	

Add Allergy Show Inactive Allergies

9. Within the **Allergies** widget, you can inactivate or delete an allergy by clicking the **Make Inactive** icon or the **Delete** icon.

**Allergies**

Active Allergies

↕ Allergy	↕ Reaction	↕ Onset Date	↕ Date Entered	Actions
amoxicillin	Severe: Angioedema	-	06/20/2018	 



[Add Allergy](#) [Show Inactive Allergies](#)

10. If you make an allergy **Inactive**, it will be placed in the inactive allergies list, which can be seen by clicking on the **Show Inactive Allergies** button.

**Allergies**

amoxicillin is now inactive. ✕

Active Allergies



↕ Allergy	↕ Reaction	↕ Onset Date	↕ Date Entered	Actions
Bactrim	Mild to Moderate: Swollen lymph glands	-	06/20/2018	 

[Add Allergy](#) [Show Inactive Allergies](#)

11. To re-activate an inactive allergy, click the **Make Active** icon.


**Allergies**

Active Allergies

↕ Allergy	↕ Reaction	↕ Onset Date	↕ Date Entered	Actions
Bactrim	Mild to Moderate: Swollen lymph glands	-	06/20/2018	 

[Add Allergy](#) [Hide Inactive Allergies](#)

Inactive Allergies

↕ Allergy	↕ Reaction	↕ Onset Date	↕ Date Inactivated	Actions
amoxicillin	Severe: Angioedema	-	06/20/2018	

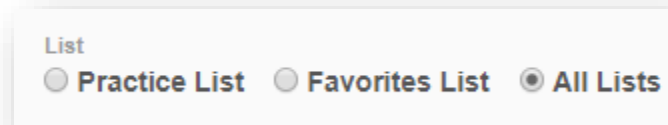
## Pharmacy Management

## Adding a Pharmacy

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

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

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

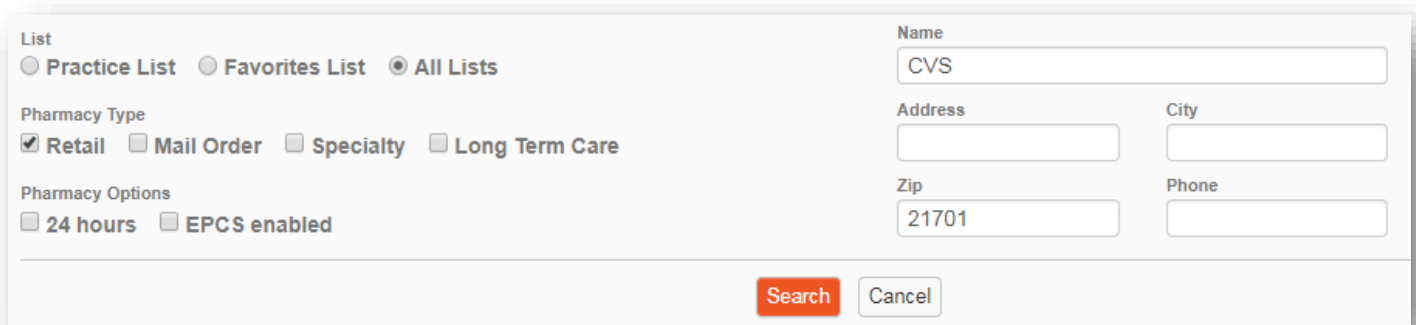


List

Practice List  Favorites List  All Lists

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

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



List

Practice List  Favorites List  All Lists

Pharmacy Type

Retail  Mail Order  Specialty  Long Term Care

Pharmacy Options

24 hours  EPCS enabled

Name

CVS

Address

City

Zip

21701

Phone

Search Cancel

**Please Note:** When searching for a pharmacy, less is more. Rcopia is very intuitive and will recognize limited information.

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

**Retail Pharmacies** Showing 1 - 10 of 11 Retail pharmacies found [Click row to add pharmacy to the patient pharmacy list.](#)

First Previous **1** 2 Next Last

Name	Address	Phone & Fax	Type
<b>FREDERICK, MD</b>			
CVS Pharmacy # 1484	402 SO. JEFFERSON STREET	Phone: (301) 663-9188 Fax: (301) 698-9877	R E
CVS Pharmacy # 1518	901 WEST 7TH STREET	Phone: (301) 694-3392 Fax: (301) 694-8671	R E
CVS Pharmacy # 2335	8032 C LIBERTY ROAD	Phone: (301) 846-4129 Fax: (301) 846-7761	R E
GIANT PHARMACY #335	1700 King Fisher Drive	Phone: (301) 815-2201 Fax: (844) 411-6310	C R E
GIANT PHARMACY #346	5316 New Design Road	Phone: (301) 698-9430 Fax: (844) 411-6320	C R E

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

**Pharmacy**

CVS Pharmacy # 1518 (R) (E) - 901 WEST 7TH STREET, FREDERICK MD 21701

CVS Pharmacy # 1518 (R) (E) - 901 WEST 7TH STREET, FREDERICK MD 21701

Browse Pharmacy...

### Send to a Mail Order Pharmacy

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

List  
 Practice List  Favorites List  All Lists

Pharmacy Type  
 Retail  Mail Order  Specialty  Long Term Care

Pharmacy Options  
 24 hours  EPCS enabled

- To select a pharmacy, click on the row to add the pharmacy to the patient’s record.

**Mail Order Pharmacies** Showing 1 - 10 of 179 mail order pharmacies found [Click row to add pharmacy to the patient pharmacy list.](#)

First Previous **1** 2 3 ... Next Last

Name	Address	Phone & Fax	Type
<b>ALAMEDA, CA</b>			
ALM MAIN	2417 Central Avenue	Phone: (510) 752-9250 Fax: (510) 752-9065	C MO E
<b>SAN CARLOS, CA</b>			
ALPHASCRIP SPECIALTY PHARMACY	1160 INDUSTRIAL RD #17	Phone: (800) 780-3584 Fax: (866) 936-8206	MO E

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

## Split a Prescription


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

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

Pharmacy  
 CVS Pharmacy # 1518 (R) (E) - 901 WEST 7TH STREET, FREDEF ▼

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

**Prescribe Medication**


 **Lipitor (atorvastatin)** 20 mg tablet ▼ \*

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
Provider  
 Aaron, John Wendel ▼

Pharmacy 1  
 CVS Pharmacy # 1518 (R) (E) - 901 WEST 7TH STREET, FREDEF ▼

Pharmacy 2  
 Aetna Rx Home Delivery (C) (MO) (E) - 2528 NW ▼

 Split

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

Patient Directions \*  
 Take ▼  1 ▼ tablet ▼ by mouth ▼ once a day ▼ -- Other -- ▼

Additional Directions to Patient

PATIENT  
 Weight (kg)  Weight (lbs)

For Pharmacy #1

Duration: -- Select -- ▼    Quantity \* 30  tablet ▼    Refills: none ▼    Substitution permitted ▼

For Pharmacy #2

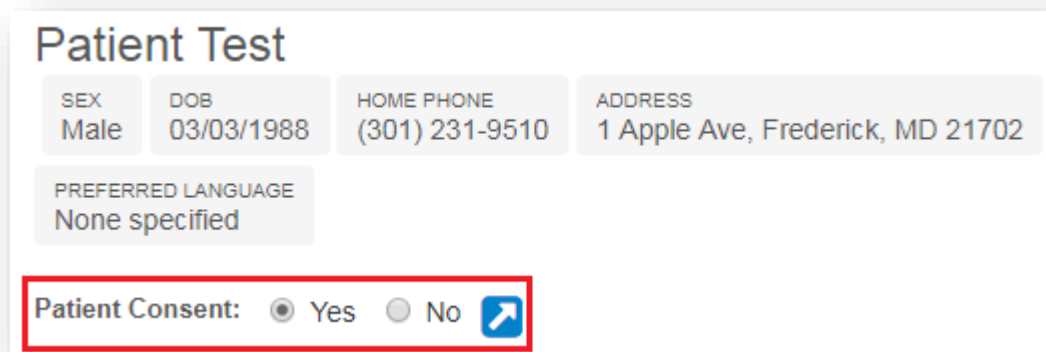
Duration: -- Select -- ▼    Quantity \* 90  tablet ▼    Refills: 3 ▼    Substitution permitted ▼

Note: Using both quantity fields will create two prescriptions.

# Medication Management

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

1. **Medication History** – Obtain up to 2 years of medication history. In order to use this feature, you must indicate that the patient has given consent to view his/her medication history by choosing the **Yes** button, shown below.



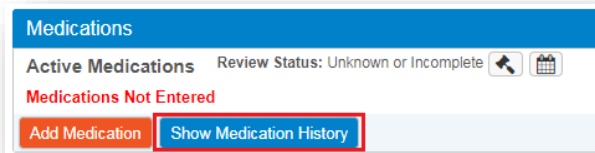
The screenshot shows a patient information form titled "Patient Test". It includes fields for SEX (Male), DOB (03/03/1988), HOME PHONE ((301) 231-9510), ADDRESS (1 Apple Ave, Frederick, MD 21702), and PREFERRED LANGUAGE (None specified). At the bottom, there is a "Patient Consent" section with two radio buttons: "Yes" (selected) and "No". A red box highlights the "Patient Consent" section.

2. **Add Medication** – Add an active medication within the **Medication** widget.

## Obtaining Medication History

Rcopia 4 has the ability to obtain medication history for up to 2 years for patients from SureScripts. SureScripts receives medication information from two sources, Pharmacy Fill data and Payer Claims information. To pull a patient's medication history, complete the following steps:

1. To begin, click on **Show Medication History** from within the **Medications** widget.



The screenshot shows the "Medications" widget. It has a blue header with the title "Medications". Below the header, it displays "Active Medications" and "Review Status: Unknown or Incomplete" with two icons. Underneath, it says "Medications Not Entered" in red. At the bottom, there are two buttons: "Add Medication" and "Show Medication History". A red box highlights the "Show Medication History" button.

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

### Medication History from Other Sources

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

2 years

Select time period...

1 month

3 months

6 months

1 year

2 years

06/2015 to 02/06/2017

Active Medication

	Directions	QTY	First Fill	Last Fill	Action
<input type="checkbox"/> <input type="checkbox"/> Actos (pioglitazone) 15 mg tablet	TAKE 1 TABLET BY MOUTH EVERY DAY	30 not specified	01/25/2017	01/25/2017	
<input type="checkbox"/> ALBUTEROL 0.083% INHAL SOLN	USE 4 TIMES A DAY AS DIRECTED	150 not specified	01/25/2017	01/25/2017	

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

Select All  Add to Active Medication

Drug	Directions	Qty	First Fill	Last Fill	Action		
<input type="checkbox"/> Protonix (pantoprazole) 40 mg tablet, delayed release (DR/EC)	TAKE 1 TABLET EVERY DAY	10 not specified	07/24/2017	08/13/2017			
Date Filled	Directions	Qty	Orig Refills	Provider	Pharmacy	Data Source	Action
08/13/2017	TAKE 1 TABLET EVERY DAY	10 not specified	11	DAVID Y HATEM UMASS MED CTR 55 LAKE AVE WORCESTER MA 5088561769(Fax)	HBS Pharmacy 738 Louis Drive Warminster PA (267) 280-5102(Fax) (267) 280-5100(Work)	Surescripts-Pharmacy	
08/03/2017	TAKE 1 TABLET EVERY DAY	10 not specified	11	DAVID Y HATEM UMASS MED CTR 55 LAKE AVE WORCESTER MA 5088561769(Fax)	HBS Pharmacy 738 Louis Drive Warminster PA (267) 280-5102(Fax) (267) 280-5100(Work)	Surescripts-Pharmacy	

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

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

**Add Medication** **Hide Medication History**

**Medication History from Other Sources**

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

2 years

**Drug History from 06/19/2016 to 06/19/2018**

Select All **+ Add to Active Medications**

Drug	Directions	Qty	First Fill	Last Fill	Actions
<input type="checkbox"/> AMBIEN 10 MG TABLET 10MG (Drug is Free Text)	Directions Not available	30 tablet	06/17/2018	06/17/2018	
<input type="checkbox"/> <i>Carafate 100 mg/mL oral suspension</i>	Directions Not available	48 not specified	06/16/2018	06/16/2018	
<input type="checkbox"/> dicyclimine 10 mg capsule	Directions Not available	120 capsule	05/07/2018	06/19/2018	

## Add an Active Medication

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

**Medications**

**Active Medications** Review Status: Unknown or Incomplete

**Medications Not Entered**

**Add Medication** **Show Medication History**

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

**Hide Add Medication** **Show Medication History**

lipito **Clear**

**lipito**

**Lipitor (atorvastatin) tablet**

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



Lipitor (atorvastatin) tablet

Strength Unknown

10 mg

20 mg

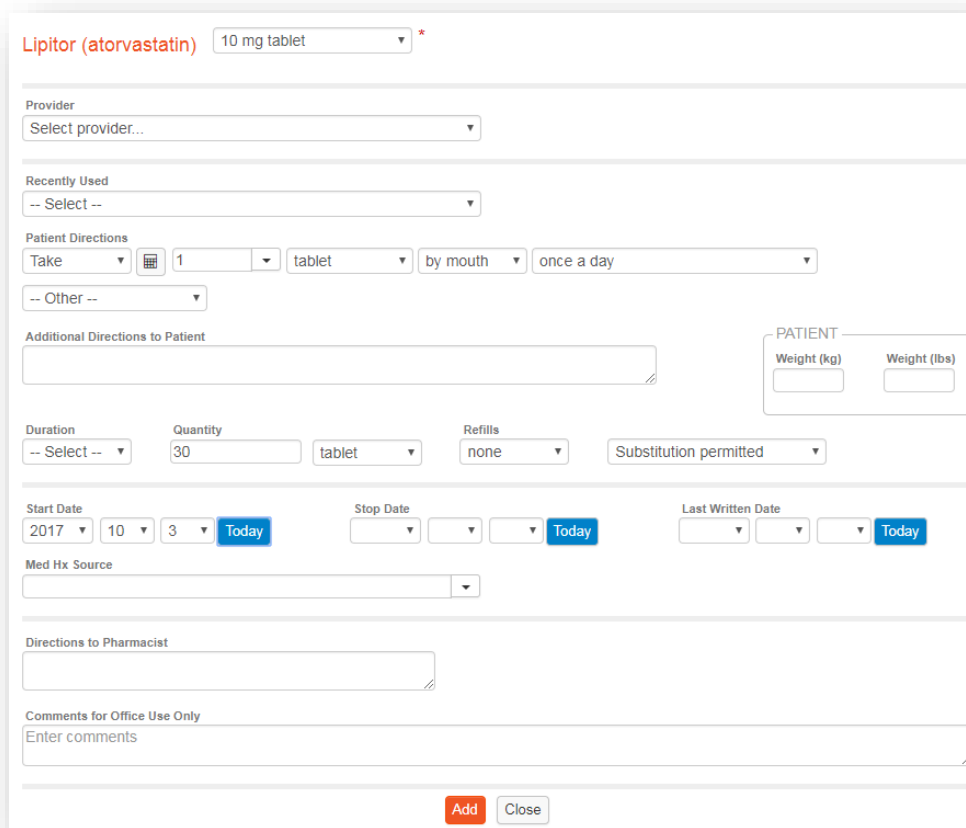
40 mg

80 mg

Enter free text "lipito" as medication

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

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



Lipitor (atorvastatin) 10 mg tablet \*

Provider  
Select provider...

Recently Used  
-- Select --

Patient Directions  
Take 1 tablet by mouth once a day  
-- Other --

Additional Directions to Patient

PATIENT  
Weight (kg) Weight (lbs)

Duration: -- Select --  
Quantity: 30 tablet  
Refills: none  
Substitution permitted

Start Date: 2017 10 3 Today  
Stop Date: Today  
Last Written Date: Today

Med Hx Source

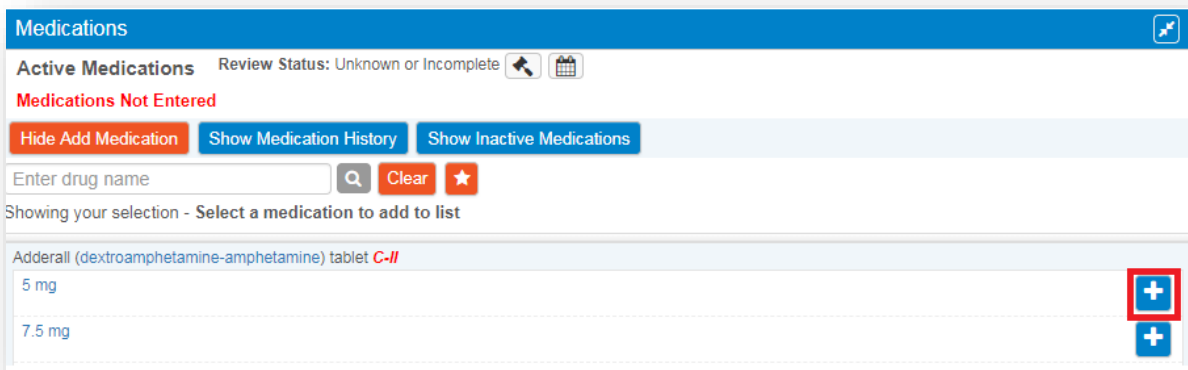
Directions to Pharmacist

Comments for Office Use Only  
Enter comments

Add Close

## Quick Add an Active Medication

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

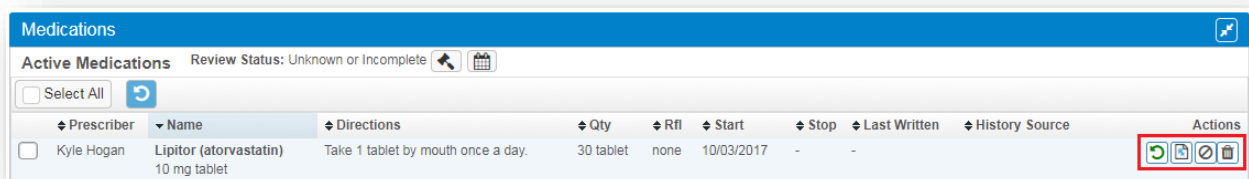


4. This will quickly add the medication to the **Active Medications** list without any details and bypass the sig screen.

## Stop/Start a Medication

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

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



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

## Stopping Multiple Medications

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

- Click on the **Stop Medication(s)** button.

- Rcopia will display a list of the medications to be stopped. Users can take a number of actions including: Change the **Date Stopped**, select a **common reason**, and add custom notes. Additionally, any active medications that have previously been prescribed can be cancelled by clicking **Cancel Last Prescription for All**.

**Stop Medication(s)**

Note: For Unknown dates, please enter your best estimates

Date Stopped \* 06/19/2018

Common Reasons Completion of Therapy

Notes Completion of Therapy

Adderall 10 mg tablet

Bactrim DS 800 mg-160 mg tablet

lisinopril 10 mg tablet

Submit Cancel

ive Medications Review Status: Unknown or Incomplete

## View Inactive Medications

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

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

**Medications**

**Active Medications** Review Status: Complete Last reconciled: (P) Katie Worrell, MD

Select All

Prescriber	Name	Directions
Katie Worrell	atorvastatin 20 mg tablet	Take 1 tablet by mouth once a day with a glass of water.
Kyle Hogan	Xanax (alprazolam) C-IV 0.5 mg tablet	Take 1 tablet by mouth once a day as needed.

Select All

Add Medication Show Medication History Show Inactive Medications

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

## Prescription/Medication Reconciliation

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

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

**Prescription/Medication Reconciliation**

**Note**  
You have prescribed a drug or drugs that needs to be reconciled with the patient's active medication list. Please choose how the new prescription should be reconciled with the patient's list of active medications.

- ADD means you would like to add this new dosing to the medication list.
- IGNORE means that you would not like to add the new dosing after all.
- STOP means you would like to remove the existing dosing from the medication list, but keep it in the medication history.
- KEEP means you would like to retain the existing dosing on the medication list.

Please select an action and click continue

DAVID CROSS	
Existing Medication	New Medication
<input type="radio"/> Keep <b>Lipitor 10 mg tablet</b>	<input checked="" type="radio"/> Add <b>Lipitor 20 mg tablet</b> Take 1 tablet by mouth once a day.
<input checked="" type="radio"/> Stop	<input type="radio"/> Ignore Quantity: 30 tablet

**Continue**

The available action options are:

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

# PDMP (Prescription Drug Monitoring Program)

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

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

## Account Setup for PDMP Checking

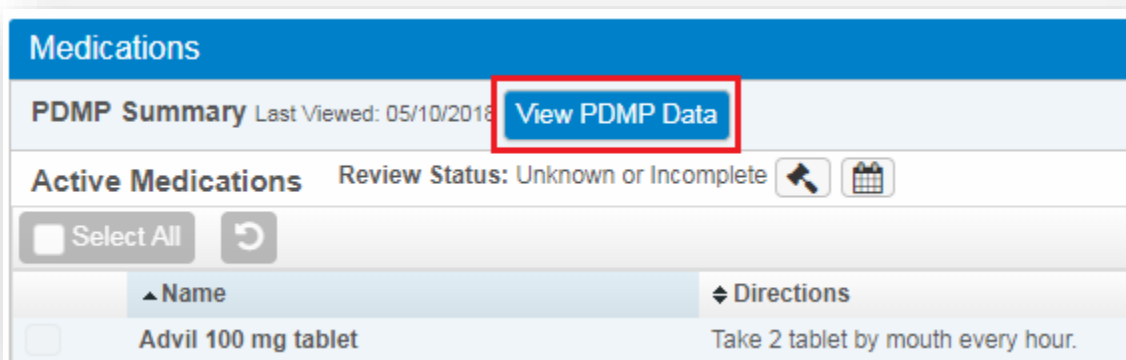
To find out more information about PDMP checking and to have your account set up, please contact our 24/7 Support Team at **(866) 263-6512** or contact your Sales representative.

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

## Accessing and Viewing PDMP Data

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

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



The screenshot shows a software interface for 'Medications'. At the top, there is a blue header with the word 'Medications'. Below this, there is a section for 'PDMP Summary' with the text 'Last Viewed: 05/10/2018' and a blue button labeled 'View PDMP Data' which is highlighted with a red rectangular box. Underneath, there is a section for 'Active Medications' with a 'Review Status: Unknown or Incomplete' and two icons (a magnifying glass and a calendar). Below that, there are two buttons: 'Select All' and a refresh icon. At the bottom, there is a table with two columns: 'Name' and 'Directions'. The first row of the table contains the text 'Advil 100 mg tablet' under the 'Name' column and 'Take 2 tablet by mouth every hour.' under the 'Directions' column.

- The PDMP Summary Report will display as shown below.

**Medications**

PDMP Summary Last Viewed: 05/30/2018 [Hide PDMP Data](#)

**TESTPATIENT, ALICE**

Age: 118 Data as of: 5/30/2018

+ Demographics

- Summary

Summary	Narcotics* (excluding buprenorphine):	Buprenorphine*
Total Prescriptions: 1	Current Qty: 72	Current Qty: 0
Total Prescribers: 1	Current MME/day: 18.00	Current mg/day: 0.00
Total Pharmacies: 1	30 Day Avg MME/day: 7.20	30 Day Avg mg/day: 0.00

- Prescriptions

**Prescriptions** Total Prescriptions: 1 Private Pay: 1

Fill Date	ID	Written	Drug	Qty	Days	Rx #	Prescriber	Pharmacy	Refill	Daily Dose	Pymt Type	PMP
05/19/2018	1	05/19/2018	ACETAMINOPHEN-COD #3 TABLET	120	30	A00001	AL TES	Alice'	0	18.00 MME	Private Pay	OH

\*Per CDC guidance, the MME conversion factors prescribed or provided as part of the medication-assisted treatment for opioid use disorder should not be used to benchmark against dosage thresholds meant for opioids prescribed for pain. Buprenorphine products have no agreed upon morphine equivalency, and as partial opioid agonists, are not expected to be associated with overdose risk in the same dose-dependent manner as doses for full agonist opioids. MME = morphine milligram equivalents. mg = dose in milligrams.

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

**Medications**

PDMP Summary Last Viewed: 05/30/2018 [View PDMP Data](#) ✓

**Active Medications** Review Status: Unknown or Incomplete

Select All

Name	Directions
<input type="checkbox"/> Lipitor 20 mg tablet	Take 1 tablet By Mouth once a day.

# Create a New Prescription

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

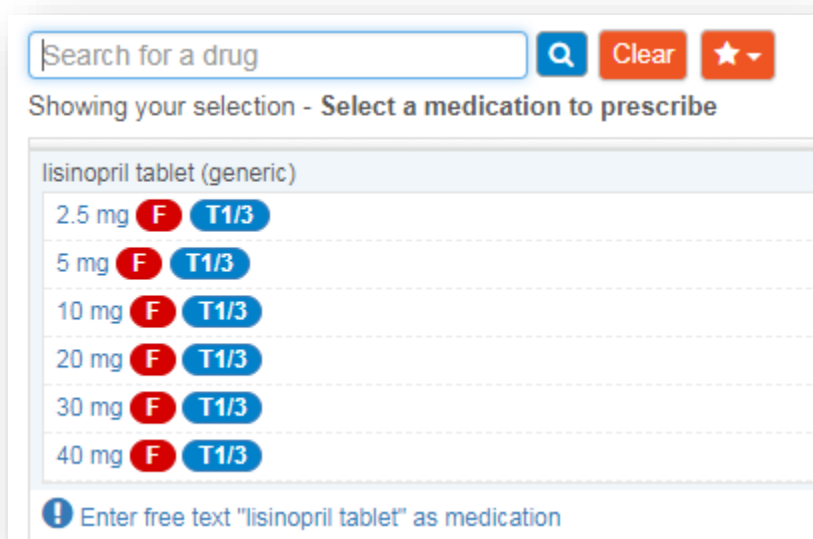
## Manual Prescription

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

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



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



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

The screenshot shows the 'Prescribe Medication' widget interface. At the top, the drug 'lisinopril' is selected with a strength of '10 mg tablet'. A red asterisk is next to the strength field, and a 'T1/3' icon is visible. Below this, the 'Provider' field is set to 'Hogan, Kyle' and the 'Pharmacy' field is set to 'CVS/pharmacy #0169 (C) (R) (E) - 799 ROCKVILLE PIKE, ROCK'. A 'Split' button is next to the pharmacy field. The 'Recently Used' field is set to '-- Select --'. The 'Patient Directions' section includes a 'Take' dropdown, a quantity of '1', a unit of 'tablet', a route of 'by mouth', a time of 'at bedtime', and an '-- Other --' dropdown. The 'Additional Directions to Patient' field is empty. The 'Duration' field is set to '-- Select --', the 'Quantity' field is '30', the 'Refills' field is '3', and the 'Substitution permitted' dropdown is set to 'Substitution permitted'. The 'Directions to Pharmacist' field is empty, and the 'Primary Diagnosis' dropdown is set to '-- Select --'. The 'Comments for Office Use Only' field contains the text 'Enter comments'. At the bottom, there are 'Review' and 'Cancel' buttons. On the right side, a 'PATIENT' box shows 'Weight (kg)' as 45.4 and 'Weight (lbs)' as 100.1.

6. Below is a description of all fields within the widget.
  - a. Verify that the **Provider** and **Pharmacy** fields are correct, or use the corresponding drop-down menus to edit.
  - b. Verify that the **Drug** you have chosen is correct. Use the drop-down menu to change the drug strength.
  - c. Select the appropriate values from the drop-down menus for the **Sig** details. The last field (Other) is optional.
  - d. Choose a **Duration**, if desired. This will automatically populate the quantity field. If a duration is chosen, the medication will be automatically removed from the patient's Active Medications list once the duration has passed.
  - e. Enter the Patient Weight in kilograms at the far right of the screen to use Rcopia's **Dose Calculator**, if desired.
  - f. Choose a numerical **Quantity** and number of prescription **Refills**. **Refills** are defaulted to 'none'.
  - g. Enter a **Primary Dx** (Diagnosis) and/or **Secondary Dx**, if desired. These fields will only appear if the patient has Problem(s) listed in their Problem History.

- h. Enter **Directions to Pharmacist**, if desired. Directions are defaulted to ‘Substitution permitted.’
  - i. Enter **Directions to Patient**, if desired. This free text box will allow you to create a tapered prescription (ex: ‘And 2 tablets on the 2nd day, 1 tablet on the 3rd day’). This section is located underneath the sig line. There is no character limit so you can type in as much text as needed to complete the tapered sig. (Note: If you exceed 140 characters, the prescription will be automatically dropped to fax and will not be transmitted electronically.)
  - j. Enter **Comments** (for office use only), if desired.
  - k. Select **Yes** or **No** for **Related to Prognosis**. If set to no, Users are required to enter a reason.
7. Click the **Review** button to proceed.

## Review Prescription

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

**Review Prescription**

*Patient:* **SWIFT, JOHNATHAN R**  
 99238 VERTIGO LANE, MINNEAPOLIS, MN 55427  
*Gender:* Male *DOB:* 10/24/1979  
*Phone:* (952) 447-5477

**Rx** **lisinopril** ★  
 10 mg tablet  
*Directions:* Take 1 (one) tablet by mouth once a day  
*Quantity:* \*\*90\*\* (ninety) tablet  
*Refills:* \*\*none\*\*  
 Substitution Permitted  
*Directions to pharmacist:* SAVINGS FOR NON-COVERED MEDICATIONS Claims: BIN: 01651, PCN: BNRX, GROUP: DFSTT, Patient ID: 10-Digit Phone; Questions: YourRx 800-577-6484  
*Rx Serial #:* SB-22648782

*Provider:* Kyle Hogan, MD  
 E-prescribing Demo  
 12800 Middlebrook Road, Germantown, MD 20874  
*Phone:* (301) 231-9510 *NPI:* 2981110911  
*Fax:* (301) 231-9511 *MD Lic #:* 12345

*Pharmacy:* CVS/pharmacy #0169  
 799 ROCKVILLE PIKE *Phone:* (301) 340-2683  
 ROCKVILLE, MD 20852 *Fax:* (301) 340-2847  
*NCPDPIID:* 2133560

**INTERNAL USE ONLY:**  **Stop Medication on:** 01/01/2018

**PATIENT ALLERGIES:** aspirin (rash), aspirin (unspecified)

1. Click one of the action buttons immediately below the prescription.
  - **Save Pending Rx:** adds the prescription to the Prescription Management section on the Patient Info Screen for review and signoff.
  - **Save and Add Rx:** creates a pending prescription and navigates the user back to medication search widget.
  - **Back:** allows you to edit the Sig details in the Prescribe Medication widget.
  - **Cancel:** cancels the prescription.
2. To take immediate action on the prescription, type in your **signature password** (if you are a provider), and click one of the four buttons on the bottom of the screen.

The image shows a 'Signature Password' input field with a white background and a light blue border. To the right of the input field are four buttons: 'Send' (orange), 'Send & Print' (orange), 'Print don't Send' (blue), and 'Sign don't Send' (blue). There is also a small information icon (i) to the right of the buttons.

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

## Prescribing Favorite Prescriptions

Users will be able to choose from their Practice list (Org Favorites), Location list (if applicable), 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 practice location's settings.

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

The image shows a context bar for a patient named JOHNATHAN R SWIFT, born 10/24/1979, Male, 37 years old. It includes a 'Create New Prescription' button (orange), a 'Favorites' drop-down menu (red star icon), and the text 'ENCOUNTER LOV: 10/03/2017' with two calendar icons.

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

The screenshot shows a patient record for JOHNATHAN R SWIFT. The patient's information includes: SEX: Male, DOB: 10/24/1979, HEIGHT: 0 cm, WEIGHT: 45.4 kg, HOME PHONE: (952) 447-5477, and MOBILE PHONE: (952) 447-5477. A 'Create New Prescription' button is visible. The 'ENCOUNTER' section shows 'LOV: 10/03/2017'. A dropdown menu is open, displaying a list of favorite prescriptions:

- Adderall (dextroamphetamine-amphetamine) 10 mg tablet Take 1 t...
- atenolol (atenolol) 50 mg tablet
- Flonase Allergy Relief 50 mcg/actuation spray,suspension 1 twice ...
- ibuprofen (bulk) 100% powder 1 once a day #1
- Januvia (sitagliptin) 25 mg tablet 1 once a day #30

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

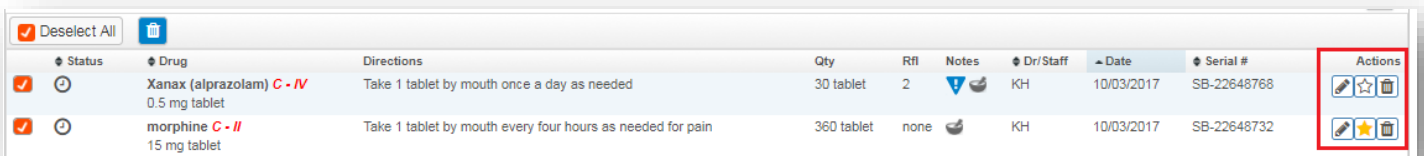
# Creating Favorites

There are multiple ways to add a new favorite prescription.

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

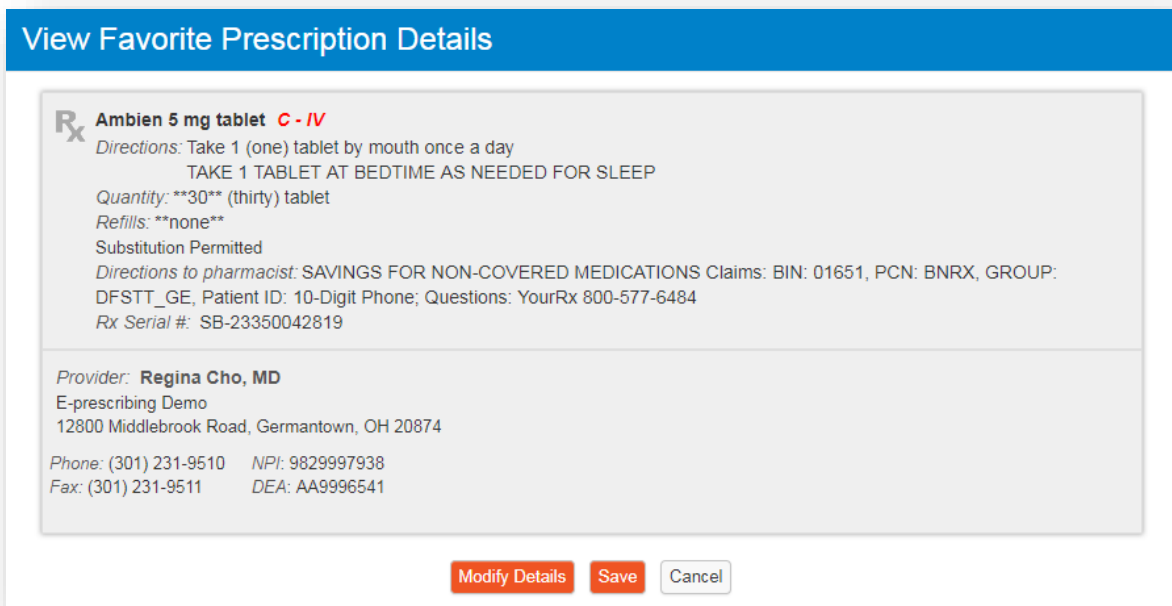
To create a favorite within the **Prescription Management** section, follow the steps below.

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



Status	Drug	Directions	Qty	Rfl	Notes	Dr/Staff	Date	Serial #	Actions
<input checked="" type="checkbox"/>	Xanax (alprazolam) C - IV 0.5 mg tablet	Take 1 tablet by mouth once a day as needed	30 tablet	2		KH	10/03/2017	SB-22648768	
<input checked="" type="checkbox"/>	morphine C - II 15 mg tablet	Take 1 tablet by mouth every four hours as needed for pain	360 tablet	none		KH	10/03/2017	SB-22648732	

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



### View Favorite Prescription Details

**Rx Ambien 5 mg tablet C - IV**  
*Directions:* Take 1 (one) tablet by mouth once a day  
TAKE 1 TABLET AT BEDTIME AS NEEDED FOR SLEEP  
*Quantity:* \*\*30\*\* (thirty) tablet  
*Refills:* \*\*none\*\*  
Substitution Permitted  
*Directions to pharmacist:* SAVINGS FOR NON-COVERED MEDICATIONS Claims: BIN: 01651, PCN: BNRX, GROUP: DFSTT\_GE, Patient ID: 10-Digit Phone; Questions: YourRx 800-577-6484  
*Rx Serial #:* SB-23350042819

*Provider:* **Regina Cho, MD**  
E-prescribing Demo  
12800 Middlebrook Road, Germantown, OH 20874  
*Phone:* (301) 231-9510 *NPI:* 9829997938  
*Fax:* (301) 231-9511 *DEA:* AA9996541

[Modify Details](#) [Save](#) [Cancel](#)

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

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

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

*Patient:* **CROSS, DAVID M** (system2id: 66666666)  
 6785 LAUGHALOT LANE, TRENTON, NJ 08608  
*Gender:* Male *DOB:* 09/10/1972  
*Phone:* (301) 231-9567

**Rx** **lisinopril** ★  
 20 mg tablet

*Directions:* Take 1 (one) tablet by mouth once a day with meals  
*Quantity:* \*\*10\*\* (ten) tablet  
*Refills:* \*\*none\*\*  
 Substitution Permitted  
*Rx Serial #:* ST2-22626875

---

*Provider:* One TestA PrescriberOne, MD  
 9420 Key West Ave, Suite 230, Rockville, KS 20850  
*Phone:* (202) 202-1212 *NPI:* 1834203097  
*Fax:* (480) 539-0263 *DC Lic #:* 345345

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*Pharmacy:* RITE AID-5804 RITCHIE HWY  
 5804 RITCHIE HIGHWAY *Phone:* (410) 789-3775  
 BALTIMORE, MD 212253743 *Fax:* (410) 789-5812  
*NCPDPID:* 2103000

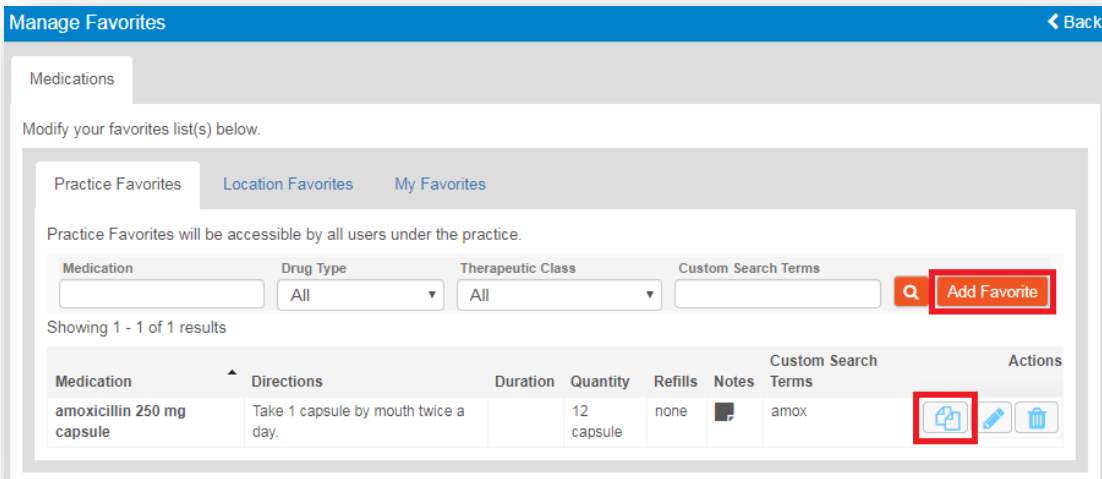
To create a favorite from the **Utilities** section, follow the steps below.

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

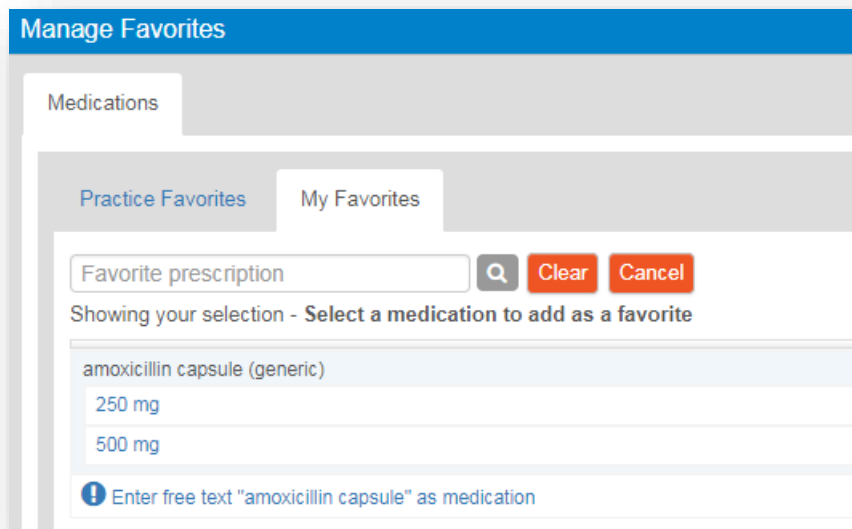
**Utilities**

<p><b>Token Management</b> &gt;</p> <p>EPCS Prescriber Dashboard</p>	<p><b>Favorites</b> &gt;</p> <p>Manage your favorite prescriptions.</p>
<p><b>Manage My Agents</b> &gt;</p> <p>List, authorize, or revoke privileges of my Provider Agents.</p>	<p><b>Merge Duplicate Patients</b> &gt;</p> <p>Merge a patient's duplicate records.</p>
<p><b>Signature Capture</b> &gt;</p> <p>Add a signature to the system.</p>	

2. After clicking on **Favorites**, you will see a list of currently favored medications. You are able to add new favorites by clicking on the duplicate icon to create a slightly different favorite from an already existing one or by clicking on the **Add Favorite** button.
  - a. Depending on location settings and account permissions, you will be able to manage the **Practice Favorites** and **Location Favorites** lists. All users can manage their own favorites through the **My Favorites** list.



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



4. When finished entering in or modifying the details for the new favorite, click the **Save** button.
5. Once a favorite is created, administrators can take a few different actions. These include:
  - a. **Duplicate:** Used to quickly duplicate the same medication favorite. Users can change the strength or details.
  - b. **Edit:** Used to edit the medication favorite.
  - c. **Delete:** Used to delete the medication favorite.

## Prescribing Active Medications

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

Prescriber	Name	Directions	Qty	Rfl	Start	Stop	Last Written	History Source	Actions
<input type="checkbox"/> Kyle Hogan	Lipitor 10 mg tablet	Take 1 tablet by mouth twice a day as needed take with a meal, test.	28 tablet	none	07/10/2018	-	07/10/2018		
<input type="checkbox"/> Kyle Hogan	lisinopril 20 mg tablet	Take 1 tablet by mouth once a day.	60 tablet	3	06/19/2018	-	07/02/2018		

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

## Compound Drug Prescriptions

To create a compound prescription, begin by selecting one of the drugs within the compound as the base.

Then, within the “Directions to Pharmacist” field, fill in details for any of the additional drugs that are being compounded.

See the example below.

**Lidocaine Viscous 2 % mucosal solution** P1

---

**Provider**  
Cho, Regina ▼

**Pharmacy**  
RITE AID-9840 MAIN ST. (C) (R) (E) - 9840 MAIN ▼ + Split

---

**Patient Directions \***

-- Action -- ▼ ⌘ -- Dose -- ▼ -- Dose Unit -- ▼ -- Route -- ▼ -- Frequency --

**Additional Directions to Patient**

Patient should swish and spit 10 mL every 4 hours as needed for mouth soreness +

---

**Duration** -- Select -- ▼ **Quantity \***  **-- Unit --** ▼ **Refills** none ▼ **Substitution permitted** ▼

---

**Directions to Pharmacist**

Combine the Lidocaine with 40 mL diphenhydramine 12.5 mg/5 mL liquid + 40 mL maalox = total 120 mL + ⬆ ⬇ ⬆

## Titration and Tapered Prescriptions

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

See the example below.

The screenshot shows a prescription form for prednisone. At the top, the drug name "prednisone" is displayed in red, followed by a dropdown menu set to "10 mg tablet" with an asterisk. Below this, the "Provider" field is set to "Doctor, Jessica" and the "Pharmacy" field is set to "Walgreens Drug Store 07357 (C) (R) (E) (24) - 300", with a "Split" button next to it. The "Patient Directions" section includes a dropdown for "Take" (set to "Take"), a quantity field with "4", a unit dropdown set to "tablet", a route dropdown set to "by mouth", and a frequency dropdown set to "once a day". The "Additional Directions to Patient" field contains the text: "for 2 days. Then, 3 tablets for 2 days. Then, 2 tablets for 2 days. Then, 1 tablet for 2 days. Then, 1/2 tablet for 2 days. TAKE AFTER BREAKFAST." At the bottom, the "Duration" is set to "-- Select --", the "Quantity" is "21", the unit is "tablet", "Refills" is set to "none", and "Substitution permitted" is checked.

**prednisone** 10 mg tablet \*

Provider  
Doctor, Jessica

Pharmacy  
Walgreens Drug Store 07357 (C) (R) (E) (24) - 300 Split

**Patient Directions \***  
Take 4 tablet by mouth once a day

**Additional Directions to Patient**  
for 2 days. Then, 3 tablets for 2 days. Then, 2 tablets for 2 days. Then, 1 tablet for 2 days. Then, 1/2 tablet for 2 days. TAKE AFTER BREAKFAST.

Duration: -- Select --    Quantity: 21    tablet    Refills: none    Substitution permitted

# Sending a Prescription

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

The screenshot shows a software interface for managing prescriptions. At the top, there is a 'Deselect All' button and a trash icon. Below is a table with columns: Status, Drug, Directions, Qty, Rfl, Notes, Dr/Staff, Date, Serial #, and Actions. Three prescriptions are listed, each with a checked checkbox in the Status column. Below the table is another 'Deselect All' button and a trash icon, followed by a 'Signature Password' input field. At the bottom, there are four buttons: 'Send', 'Send & Print', 'Print don't Send', and 'Sign don't Send', along with an information icon.

Status	Drug	Directions	Qty	Rfl	Notes	Dr/Staff	Date	Serial #	Actions
<input checked="" type="checkbox"/>	lisinopril 10 mg tablet	Take 1 tablet by mouth once a day	90 tablet	none		KH	10/03/2017	SB-22648782	
<input checked="" type="checkbox"/>	Xanax (alprazolam) C-IV 0.5 mg tablet	Take 1 tablet by mouth once a day as needed	30 tablet	2		KH	10/03/2017	SB-22648768	
<input checked="" type="checkbox"/>	morphine C-II 15 mg tablet	Take 1 tablet by mouth every four hours as needed for pain	360 tablet	none		KH	10/03/2017	SB-22648732	

Deselect All

Signature Password

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

# Sending a Controlled Substance Prescription

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

## From the Review Screen

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

**TWO FACTOR AUTHENTICATION REQUIRED** [Signing Protocol Help](#)

Please select the checkbox for your controlled substance order(s) to authorize transmission.

Xanax 0.5 mg tablet - DISP: 30 tablet      DATE 10/03/2017

- By completing the two-factor authentication protocol at this time, you are legally signing the prescription(s) and authorizing the transmission of the above information to the pharmacy for dispensing.
- The two-factor authentication protocol may only be completed by the practitioner whose name and DEA registration number appear above.

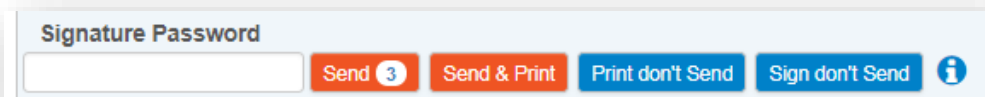
**Sign and Send**    **Back**    **Cancel**

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

## From Prescription Management/Prescription Report

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

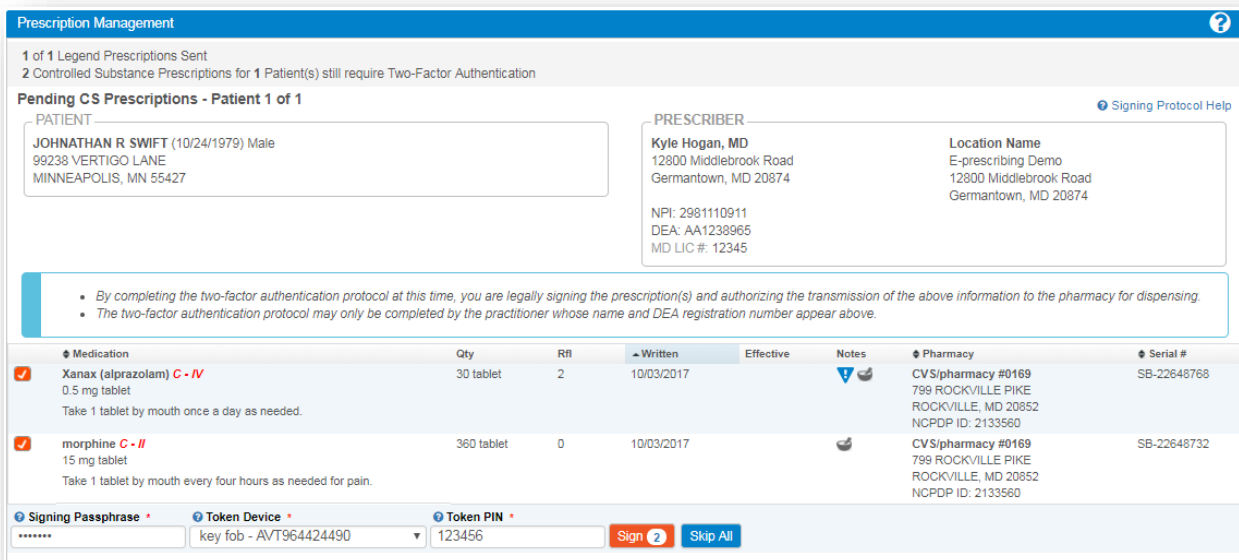
1. Once you have identified which prescriptions you wish to send, enter your signature password and click the **Send** button. There will be a badge notification with the number of prescriptions you are transmitting.



Signature Password

**Send** 3 **Send & Print** **Print don't Send** **Sign don't Send** ⓘ

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



**Prescription Management**

1 of 1 Legend Prescriptions Sent  
2 Controlled Substance Prescriptions for 1 Patient(s) still require Two-Factor Authentication

**Pending CS Prescriptions - Patient 1 of 1**

**PATIENT**  
JOHNATHAN R SWIFT (10/24/1979) Male  
99238 VERTIGO LANE  
MINNEAPOLIS, MN 55427

**PRESCRIBER**  
Kyle Hogan, MD  
12800 Middlebrook Road  
Germantown, MD 20874  
NPI: 2981110911  
DEA: AA1238965  
MD LIC #: 12345

**Location Name**  
E-prescribing Demo  
12800 Middlebrook Road  
Germantown, MD 20874

• By completing the two-factor authentication protocol at this time, you are legally signing the prescription(s) and authorizing the transmission of the above information to the pharmacy for dispensing.  
• The two-factor authentication protocol may only be completed by the practitioner whose name and DEA registration number appear above.

Medication	Qty	Rfl	Written	Effective	Notes	Pharmacy	Serial #
<input checked="" type="checkbox"/> Xanax (alprazolam) <b>C - IV</b> 0.5 mg tablet Take 1 tablet by mouth once a day as needed.	30 tablet	2	10/03/2017			CVS/pharmacy #0169 799 ROCKVILLE PIKE ROCKVILLE, MD 20852 NCPDP ID: 2133560	SB-22648768
<input checked="" type="checkbox"/> morphine <b>C - II</b> 15 mg tablet Take 1 tablet by mouth every four hours as needed for pain.	360 tablet	0	10/03/2017			CVS/pharmacy #0169 799 ROCKVILLE PIKE ROCKVILLE, MD 20852 NCPDP ID: 2133560	SB-22648732

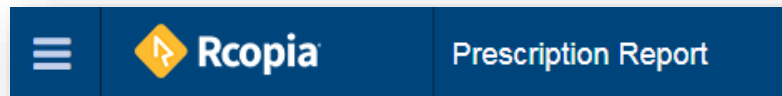
**Signing Passphrase** \* **Token Device** \* **Token PIN** \*

\*\*\*\*\* key fob - AVT964424490 123456 **Sign** 2 **Skip All**


# Prescription Report

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

1. Click **Prescription Report** in the blue toolbar at the top of the screen.

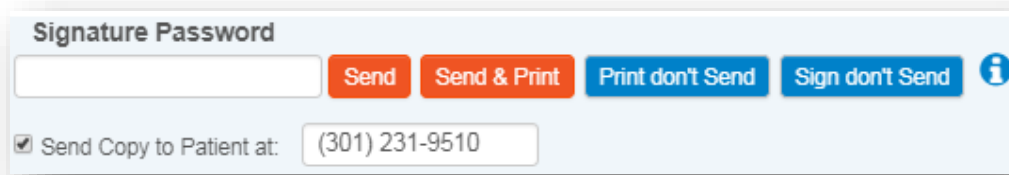


2. Select the appropriate provider or select **All Providers** from the drop-down list.
3. Select either **All Patients** or the **Current (patient)**.
4. Select the appropriate Status:
  - a. **All**: displays pending and completed prescriptions.
  - b. **Pending**: displays only those prescriptions that have not had any action taken on them.
  - c. **Completed**: displays all completed prescriptions (signed and sent or signed and printed).
    - i. When **Completed** is selected, a date filter is displayed. Select the appropriate date range.
  - d. **Undeliverable**: displays prescriptions that have not been delivered to the pharmacy.
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 take Action on each prescription.
  - a. **Status**: shows whether or not a prescription was successfully sent to the prescription's final destination. Hover your mouse over the icon to display the meaning for each icon.
  - b. **Pre-validation messages**:
    - i. "Patient Address Incomplete. Unsendable"
      1. The patient is missing Address Line 1 which must be populated in order to transmit a controlled substance electronically
    - ii. "Oversize notes, Fax/Print Only" -
      1. Either patient directions or directions to pharmacist have exceeded the allowed character limit.

- 
- c. **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.
    - a. **All prescriptions:**
      - i. Favor: adds the prescription to your Favorites List.
    - b. **Pending prescriptions:**
      - i. Modify: allows you to modify the prescription before completing it.
      - ii. Delete: allows you to delete any instance of the prescription.
    - c. **Completed prescriptions:**
      - i. Cancel: cancels the prescription, and sends a notice to the pharmacy.
      - ii. Reprint: reprints a completed prescription.
      - iii. Resend: resends a completed prescription.
      - iv. 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** at the bottom.
  9. Click one of the action buttons, listed below, depending on healthcare provider.

## Provider Options

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



The screenshot shows a form titled "Signature Password". It features a text input field for the password, followed by four buttons: "Send" (orange), "Send & Print" (orange), "Print don't Send" (blue), and "Sign don't Send" (blue). To the right of these buttons is an information icon (i). Below the password field, there is a checked checkbox labeled "Send Copy to Patient at:" followed by a text input field containing the phone number "(301) 231-9510".

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



## Provider Agent Options

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

- **Send, signature to follow:** button will display instead of the Send button. This sends the prescription to the pharmacy electronically and also to the Prescriber's pending prescription queue to be acknowledged.

## Staff Options

- **Hold for Signature:** sends the prescription request to the appropriate prescriber so they can review and act upon it as necessary.
- **Print without sending:** sends the prescription(s) to the local office printer, but does not send to the prescriber's queue.
- **Archive:** adds medication(s) to the patient's active medication list, and does not send to a prescriber.

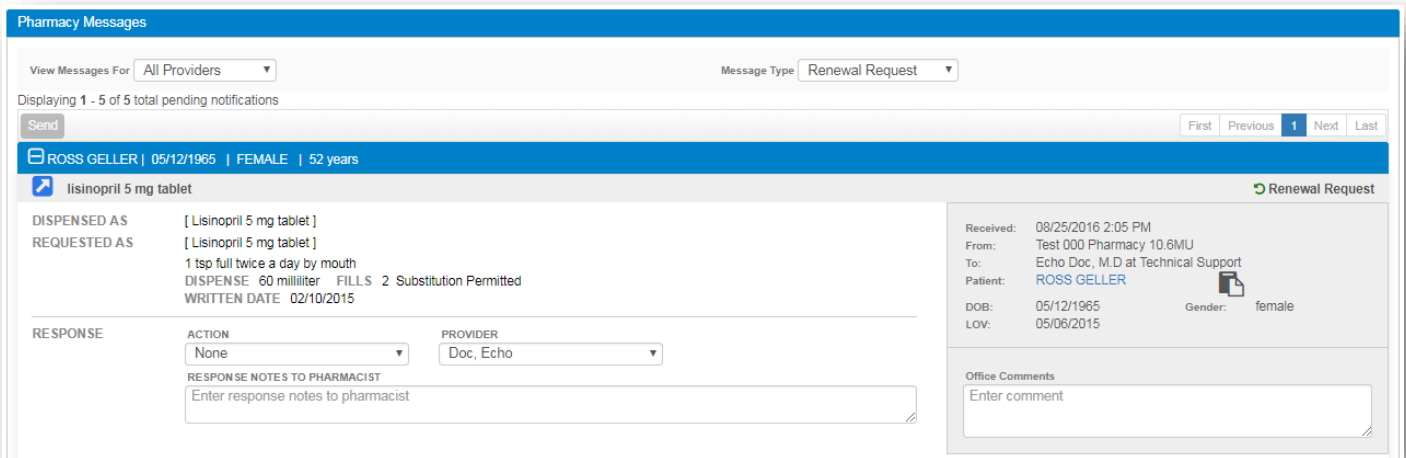
# Pharmacy Messages

**Pharmacy Messages** are electronic requests generated by a pharmacy. These could be refill requests for the patient once his or her medication refills have been completed, change requests, or cancellation acknowledgments. When your practice group has any pharmacy messages, a badge notification will display within the top toolbar.

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



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



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

additional refills. When you choose the appropriate refills, you are authorizing this fill plus X refills of the medication.

- d. **Forward:** allows a staff member to forward the prescription request to another qualified prescriber in his or her practice.
  - e. **Remove:** should only be used if you have previously handled this request and it is a duplicate.
4. If desired, select any **Pharmacy Notes** from the drop-down list or type them into the box to the right.
  5. If desired, enter **Comments** in the box. These comments are visible only to you and your office staff.
  6. After you have selected an action for each request, enter your **Signature Password** at the top or bottom of the screen and click **Send**.

The screenshot shows a software interface for managing a prescription request. At the top, there is a "Signature password" input field and a "Send" button. Below this, a patient header displays "ROSS GELLER | 05/12/1965 | FEMALE | 52 years". The medication is identified as "lisinopril 5 mg tablet". The interface shows the following details:

- DISPENSED AS:** [ Lisinopril 5 mg tablet ]
- REQUESTED AS:** [ Lisinopril 5 mg tablet ]
- 1 tsp full twice a day by mouth**
- DISPENSE 60 milliliter FILLS 2 Substitution Permitted**
- WRITTEN DATE 02/10/2015**

The **RESPONSE** section includes:

- ACTION:** A dropdown menu currently set to "Renew, no refills".
- PROVIDER:** A dropdown menu currently set to "Hogan, Kyle".
- SEND COPY TO PATIENT AT:** (212) 555-1212
- RESPONSE NOTES TO PHARMACIST:** A text input field with the placeholder "Enter response notes to pharmacist".

**Please Note:** You can take action on up to 20 renewal requests at a time. Choose the appropriate option from the drop-down menus for up to 10 requests, type in your signature password, and click **Perform**.

# Medication Reports

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

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

## Provider Clinical Report

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

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

**Patient**

David Cross

SEX: Male, DOB: 09/10/1972, HOME PHONE: (623) 554-7784, MOBILE PHONE: (623) 554-7784

ADDRESS: 6785 Laughalot Lane, Trenton, NJ 08608, PREFERRED LANGUAGE: None specified

Patient Consent:  Yes  No

Pharmacy: CVS/pharmacy #1880 (C) (R) (E) - 12619 E-J W

PRESCRIPTION BENEFIT: PLANA (RXHUBPBM), mail only

**Provider Clinical Report** **Patient Clinical Report**

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

**Provider Clinical Report** Back

David Cross

PATIENT DETAILS: DOB: 09/10/1972, Height: Unknown, Weight: Unknown, Gender: male

DEFAULT PHARMACY: CVS/pharmacy #1880, 12619 E-J WISTERIA DRIVE, GERMANTOWN, MD 20874, Ph. (301) 540-1734, Fx. (301) 916-6509

**Medications**  
Medication not Reviewed.

Name	Directions	Qty	Rfl	Start	Stop	Last Written	History Source
Ambien (zolpidem) 5 mg tablet	Take 1 tablet by mouth once a day. TAKE 1 TABLET AT BEDTIME AS NEEDED FOR SLEEP.	30 tablet	0			01/26/2017	Pharmacy

**Inactive Medications**

Name	Directions	Qty	Rfl	Start	Stop	Reason Stopped	History Source
lisinopril 5 mg tablet	Take 1 tablet by mouth once a day.	30 tablet	3	10/24/2017	10/31/2017	Completion of Therapy	

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

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

## Patient Clinical Report

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

**Patient Clinical Report** ← Back

**David Cross**

**PATIENT DETAILS**

DOB: 09/10/1972

Height: Unknown

Weight: Unknown

Gender: male

**DEFAULT PHARMACY**

CVS/pharmacy #1880

12619 E-J WISTERIA DRIVE,  
GERMANTOWN, MD 20874

Ph. (301) 540-1734

Fx. (301) 916-6509

**Medications**

Name	Directions
Ambien (zolpidem) 5 mg tablet	Take 1 tablet by mouth once a day. TAKE 1 TABLET AT BEDTIME AS NEEDED FOR SLEEP.

**Allergies - Active Allergies**

Allergy	Reaction
Keflex	swelling

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

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


# Clinical Alerts


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

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

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

**Clinical Alerts**

 Rcopia has identified 1 clinical alert with the medication, **Plavix (clopidogrel) 300 mg tablet**, that you are prescribing for DAVID m CROSS (09/10/1972).

**DRUG INTERACTION ALERT!** 

DAVID m CROSS (09/10/1972) is being given **Nexium (esomeprazole magnesium) 20 mg capsule, delayed release (DR/EC)**, which has a **severe** incidence of adverse effects when combined with the drug you have just prescribed, **Plavix (clopidogrel) 300 mg tablet**. [\[See Reference\]](#). Proceed with extreme caution.

Do not show this alert for this medication and this patient for one (1) year.

You may provide a justification for prescribing this medication notwithstanding the warning.

Reminder:  
The professional duty in providing care to the patient lies solely with the healthcare professional providing such service, and the Rcopia prescription tool is in no way intended to replace or substitute for professional judgement.

**Prescribe Anyway** Do Not Prescribe this Medication



### **Drug interaction alert**

When prescribing medications, Rcopia 4 will check against the active medication list for drug-drug interactions. The alerts will appear after you have chosen the drug and corresponding strength. These alerts will appear in **RED**, as shown here:

These alerts will have a reference section that can be accessed by clicking the arrows to the right of the message.

### **Allergy interaction alert**

When prescribing medications, Rcopia 4 will alert you if you are prescribing a medication that is associated with a drug on the list of allergies and adverse reactions. The alerts will appear after you have searched for the drug and chosen the strength. These alerts will appear in **RED**, as shown here:

### **Drug-Diagnosis interaction alert**

When prescribing medications, Rcopia 4 will alert you if you are prescribing a medication that may interact with a diagnosis or Problem documented for your patient. The alerts will appear after you have searched for the drug and chosen the strength. These alerts will appear in **RED**, as shown here:

### **Pregnancy and Lactation interaction alert**

You can input a patient's pregnancy or lactation status in the **Patient Demographics screen**. Once selected, you will receive any precautions associated with pregnancy or lactation.

Clicking on the arrows to the right of the message will provide you with more information pertaining to the alert.

### **Duplicate check**

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

### **Dose check**


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

### **Geriatric Precautions**

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

### **Pediatric Precautions**

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



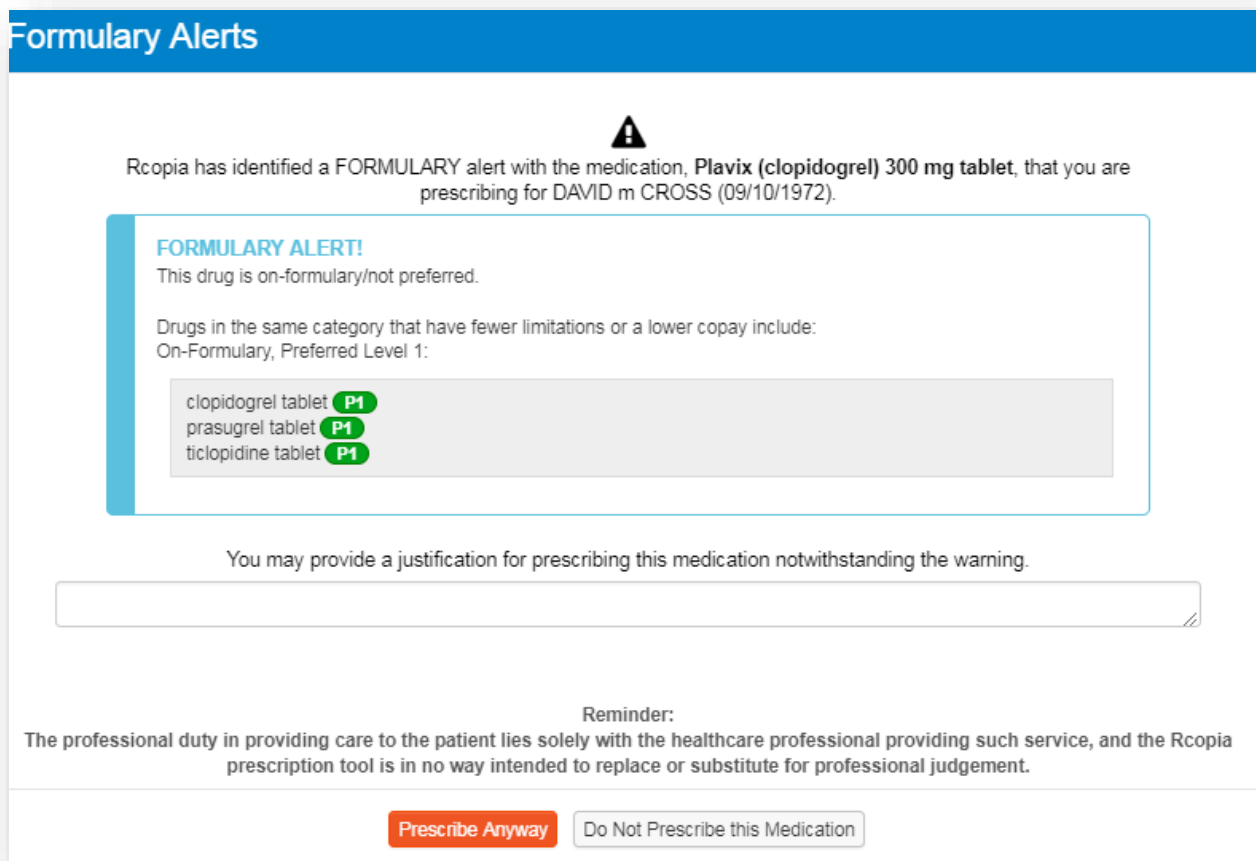
# Formulary Alerts

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

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

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

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



**Formulary Alerts**

Rcopia has identified a **FORMULARY** alert with the medication, **Plavix (clopidogrel) 300 mg tablet**, that you are prescribing for **DAVID m CROSS (09/10/1972)**.

**FORMULARY ALERT!**  
This drug is on-formulary/not preferred.

Drugs in the same category that have fewer limitations or a lower copay include:  
On-Formulary, Preferred Level 1:

- clopidogrel tablet **P1**
- prasugrel tablet **P1**
- ticlopidine tablet **P1**

You may provide a justification for prescribing this medication notwithstanding the warning.

**Reminder:**  
The professional duty in providing care to the patient lies solely with the healthcare professional providing such service, and the Rcopia prescription tool is in no way intended to replace or substitute for professional judgement.

**Prescribe Anyway** Do Not Prescribe this Medication

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

# Utilities

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

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

## Utilities

### Manage My Favorite Prescriptions

Create, Categorize, Modify, or Remove your Favorite Prescriptions.



### Manage My Agents

List, authorize, or revoke privileges of my Provider Agents.



### Merge Duplicate Patients

Merge a patient's duplicate records.



### Pharmacy List Maintenance

Add or modify the pharmacy list.



### Members Area

Update Account Information, Add Office Locations, View User Summary, Register New Users



### Supervisor Management

Designate Supervisors.

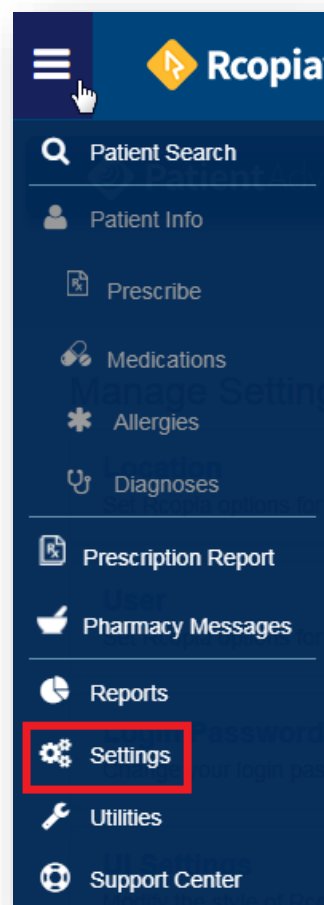
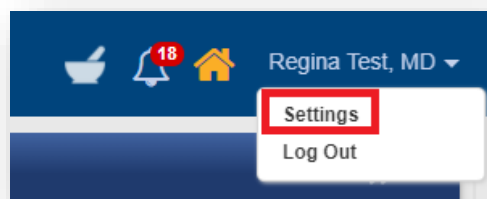


# Accessing Rcopia User and Location Preferences

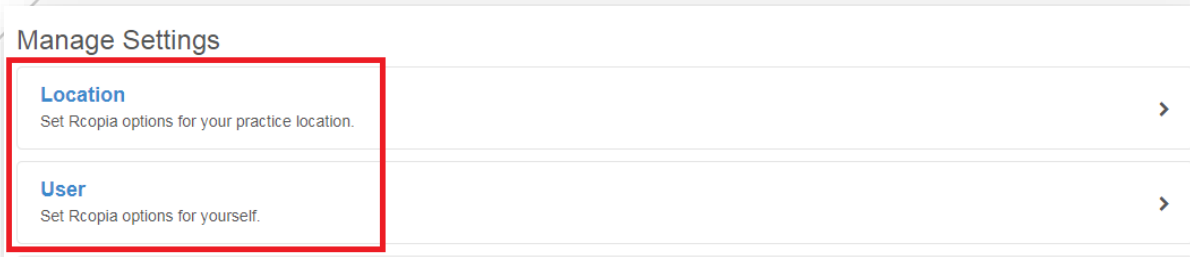
User preferences will only apply to the account on which the preferences are set. Location preferences can only be set by an administrator and will apply to all users within a practice location.

## How to Set Preferences

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



2. Then, click the **User** or **Location** option.



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

# User Preferences Defined

## Navigation

- **Always start at this location:** Allows users who are connected to more than one location to set their default location when starting Rcopia.
- **Always start on:** Preference allows a user to determine what screen they will begin on when entering e-prescribing.
  - i. Patient Search **(default)**
  - ii. Pharmacy Messages
  - iii. Prescriptions Management

## Pharmacy

- **Default pharmacy list to search:** Allows users to determine which list will be defaulted when searching for a pharmacy.
  - i. Favorite List
  - ii. Practice List
  - iii. All Lists **(default)**

## Medication

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




## Prescription

- **Default provider for prescribing:** Allows users to select a provider that the system will default to when creating prescriptions.
- **Populate sig fields from previous prescriptions ("sticky" feature):** Allows the system to populate the sig fields with how the most recent providers at the practice prescribed the selected medication. This will work with prescriptions written within the past 14 days.
- **Include patient allergies on printed/faxed prescription:** Allows users to determine whether or not they would like patient allergies to display on printed/faxed prescriptions.
- **Custom additional directions to patient (one per line):** A custom prescription note may be no more than 210 characters in length. If a prescription exceeds the limit, it will be sent via fax to the pharmacy. Users can find and use these notes through the + icon on the sig page next to the **Additional Directions to Patient** text field.
- **Custom pharmacist notes (one per line):** Users can find and use these notes through the + icon on the sig page next to the **Directions to Pharmacist** text field.
- **Custom prescription comments (one per line):** Users can find and use these notes through the + icon on the sig page next to the **Comments for Office Use Only** text field.
- **Edit patient weight while prescribing:** Allows users to edit patient weight on the **Prescribe Medication** screen.

## Reporting

- **Default provider to:** Allows user to report on all providers or one specific provider.
- **Default prescription status to:** Allows a user to determine which prescription status they wish to set when reporting.
  - i. Pending Prescriptions (**default**)
  - ii. Completed Prescriptions
  - iii. All Prescriptions


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- **Default prescription management range:** Allows user to set default time range for reporting.
    - i. Today (**default**)
    - ii. Past 3 Days
    - iii. Past 7 Days
    - iv. Past 14 Days
    - v. Past 30 Days
  - **Include prescriptions from other locations:** Allows users to determine if they wish to view all prescriptions from other offices they are connected to (user has to be connected to more than one location in order to set this user preference).
  - **Include cancelled prescriptions:** Allows user to determine whether or not they wish to view cancelled prescriptions when reporting.

# Rcopia Location Preferences Defined

## Reminders

- **Drug-drug interactions:**
  - i. All interactions **(default)**
  - ii. Severe and Contraindicated Only
  - iii. Contraindicated Only
- **Drug-allergy interactions:**
  - i. All warnings **(default)**
  - ii. Ingredient and Specific Group Allergies Only
- **Drug-diagnosis interactions:**
  - i. Contraindicated for Exact Diagnoses Only **(default)**
  - ii. Contraindicated for Exact and Related Diagnoses
  - iii. Contraindicated or Evaluation Needed for Exact Diagnoses Only
  - iv. Contraindicated or Evaluation Needed for Exact diagnosis and Related Diagnosis
  - v. All Warnings for Exact Diagnoses Only
  - vi. All Warnings for Exact and Related Diagnoses
- **Geriatric warnings:** The system will alert the user for any geriatric alerts within the system. **All Warnings** is the recommended setting for this setting.
- **Pediatric warnings:** The system will alert the user for any pediatric alerts within the system. **All Warnings** is the recommended setting for this setting.
- **Drug-drug interaction against External Medication History (past 120 days):** If **Yes**, Rcopia utilizes a patient's PBM/Pharmacy history (if available) for drug-drug interactions. **(default)**
- **Duplicate therapy check against External Medication History (past 120 days):** If **Yes**, Rcopia utilizes a patient's PBM/Pharmacy history (if available) for duplicate therapy checks. Providers will want to confirm that the patient is taking the medication on the history before making a clinical decision.

**Please Note:** For both interaction and duplicate checking, the PBM history will include prescription fills within the last 120 days, if available.


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- **Allow drug interaction checking against medication list:** If **Yes**, the system will perform drug interaction checking against the medication list for patients.
  - **Allow providers to suppress duplicate clinical alerts for 1 year:** If **Yes**, clinical alerts can be suppressed for one year after they are initially received by a provider. This allows providers to avoid receiving the same alert continually.
  - **When a user overrides prescription warnings:**
    - i. Require Users to Enter a Reason
    - ii. Allow Users to Enter a Reason, But do not Require It (**default**)
    - iii. Do not Permit Users to Enter a Reason
  - **Populate sig fields from previous prescriptions ('sticky' feature):** Allows the system to populate the sig fields with how the most recent providers at the practice prescribed the selected medication. This will work with prescriptions written within the past 14 days.

## Diagnosis

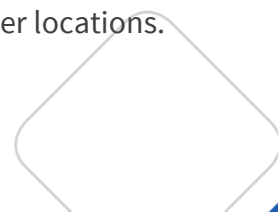
- **Supported diagnosis codes:** Allows diagnosis codes as options in the diagnosis widget. Options are **ICD-10 (Complete)**, **ICD-10 (Billable)**, **SNOMED CT**, **ICD-9**.


## Medication

- **Retain office comments and directions to Pharmacist when renewing/prescribing a medication:** Allows previous notes to the pharmacist and staff to be retained on renewals.
- **Default external medication history range:**
  - i. No Automatic Search
  - ii. Over Last 30 Days (**default**)
  - iii. Over Last 90 Days
  - iv. Over Last 180 Days
  - v. Over Last 365 Days
- **Allow incomplete drug definition:** If **Yes**, users will be able to add medications onto the active medication list without selecting a strength of the given medication.
- **Allow specifying medication history source:** If **Yes**, users will be able to view where a medication history result came from.

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- **Enable “Quick Add” without medication details:** If **Yes**, users will be able to quickly add medications onto active medication list with only the medication and strength.

## Prescriptions

- **Allow a provider to approve a prescription without entering a signature password (Certain states require signature passwords to be used as part of the electronic prescribing process; please refer to your state rules prior to disabling this feature.):** If **Yes**, providers will be able to send prescriptions to the pharmacy for filling without having to enter a signature password.
  - **Enable prescription controls on the Review Prescription screen:** If **Yes**, this allows practice to add the “Action” buttons to the Review Prescription screen.
  - **Enable Patient Notification via SMS text:** If **Yes**, this checkbox that appears in the **Pending Prescription for the Patient** section of the patient summary screen and the prescription review screen will be checked by default. This will allow an SMS text message to be sent to the patient upon signing a prescription. Patients will be able to see the pharmacy to which the prescription was sent along with coupons and drug pricing.
  - **Require provider to sign prescriptions printed by staff:** If **Yes**, provider signatures are needed on printed prescriptions.
  - **Allows prescriptions to be save as pending without sig and quantity:** If **Yes**, this allows prescriptions to be generated and saved without including sig or quantity data. This is good for the staff who do not know the sig but can still create and send to the physician’s queue for completing. **(default)**
  - **Auto-set medication stop date based on prescription duration:** If **Yes**, automatically discontinues an active medication when the duration expires. Medication automatically moves to inactive medication list.
  - **Print clinical and formulary warnings on printed/faxed prescriptions:** If **Yes**, automatically includes any drug and/or allergy interaction and/or exclusion warnings on all printed and/or faxed prescriptions.
  - **See pending and undeliverable prescriptions across all of your locations:** If **Yes**, users will be able to see pending and deliverable prescriptions from other locations.
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- **Prescription security features note to include on printed prescriptions (max 100 chars):** This will allow for a printed message to appear on all prescriptions practice wide.
  - **Custom additional directions to patient (one per line):** A custom prescription note may be no more than 210 characters in length. If a prescription exceeds the limit, it will be sent via fax to the pharmacy. Users can find and use these notes through the + icon on the sig page next to the **Additional Directions to Patient** field.
  - **Custom pharmacist notes (one per line):** Users can find and use these notes through the + icon on the sig page next to the **Directions to Pharmacist** field.
  - **Custom prescription comments (one per line):** Users can find and use these notes through the + icon on the sig page next to the **Comments for Office Use Only** field.

**Please Note:** The above three custom text options will display for all users within a location.

## Reporting

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




## Miscellaneous

- **Allow providers to manage their provider agents:** If **Yes**, providers can manage agents by clicking the left top menu icon, clicking **Utilities**, and clicking into **Manage My Agents**.
- **Include link to drug information reference site on prescribe screen (not affiliated with DrFirst):** If **Yes**, Rcopia will automatically provide a link on the 'Enter Details' screen to access a drug reference website (RxList).

**Please Note:** Site has ads and is not affiliated with Rcopia.

- **System name required to enter patient External ID:** This is the identifier used to link Rcopia to a Practice Management or EMR. This would be a required entry for all new patients added to Rcopia.
- **System name of patient External ID to display on prescriptions and reports:** Text box provided to automatically display patient/external ID on all prescriptions and reports. Not used by smaller practices.
- **Label prefix for patient External ID:** Text box provided to provide an External ID label for aforementioned External ID name.
- **Include enterprise name with location name:** If **Yes**, the enterprise name will be displayed across the top of the screen.
- **Allow partial date for medication and allergy onset:** If **Yes**, users will be able to add use partial start dates when adding medications and allergies. For example, a user will be able to add a start date by indicating the year only, not a month or day. If **No**, a user will have to input the month, day, and year for a given start date.
- **Enable Transition of Care logging:** If **Yes**, the link will appear within the patient chart, allowing the user to document the TOC date. If **No**, the transition of care link will not appear within the patient chart.
- **Include Transition of Care and encounter data in EMR/PMS interface data:** If **Yes**, transition of care and end encounter information will be sent back to the PMS or EMT. If **No**, the date will be retained in Rcopia only.

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- **Remember signature password for:** Allows system to remember signature password for selected amount of time.
    - i. Never (**default**)
    - ii. 5 Minutes
    - iii. 15 Minutes
    - iv. 30 Minutes
    - v. 45 Minutes
    - vi. 60 Minutes

## Patient Advisor

- **Enable adherence plans:** If **Yes**, users will be prompted of adherence plans (if available) while prescribing.
- **Enable patient education material and/or support programs:** If **Yes**, users will be able to access educational material that can be provided for patients.
- **Enable prescriptions savings offers (Co-pay Cards, Vouchers):** If **Yes**, users will be able to include savings on prescriptions for patients.
- **Enable electronic Prior Authorization (ePA):** If **Yes**, the ability to process prior authorizations will appear.

**Please Note:** If your practice is an enterprise and you have multiple groups / locations setup within the enterprise, these settings must be done for each individual group / location. When finished setting the preferences, click on the **Save** button at the bottom of the screen.



## Report a Problem / Help

If at any time a user has difficulties with the system when creating a prescription, or needs to report a failed prescription that was undeliverable to the pharmacy, the best option for reporting a problem to DrFirst is by email.

1. Click on the list icon and select Support.
2. Click on the Contact Us option.
3. A Contact Us link will appear at the top of the screen. Click on this link.
4. You will be brought to an email page. Please enter as much information as you have, including the serial number at the top of the page on the problem prescription, and submit it to our Support Department.

If the issue needs immediate attention, please contact the DrFirst Support Department at (866) 263-6512 or through your JIRA Service Desk account.

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