TELUS | HEALTH™

Information for Life.

Assyst Rx-A

GUI

Beginners

User Manual

TABLE OF CONTENTS

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Introduction

This manual is a basic manual to learn how to use Assyst Rx-A to fill prescriptions.

Learning Objectives

By the end of this guide, you will know how to:
- Create prescriptions in Assyst Rx-A; Create and Manage Patient files;
- Manage, create and delete drugs in a drug file; Bill prescriptions to a third party;
- Configure Assyst Rx-A to your liking; Run various kinds of reports.

Learners' and Trainers' Tips

This guide also features extra tips throughout the sections.

Did you know?

The Did you know? tips are helpful to both learners and trainers and serve to highlight certain aspect of a section, often giving helpful information on how to better use the software.

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The Software

This section details all of the information relating to Assyst Rx-A.

Launching the Software

In order to start Assyst Rx-A, double click on the following icon on your desktop:

Once the application has started, the following window will appear and you will be   for your credentials.

This would be your initials, given to you by the system administrator. Upon your first log in you will be prompted to create a new password. At any time after your initial log in, you can change your password by clicking on the   button.

Once your initials are entered, press the TAB key to move to the Password field. When the password is entered, click the OK button or simply press the ENTER key.

Drug Image Update

In the program settings (which are discussed in greater details later in this manual), you can specify an amount of days at which the software will look for new images for the drugs. Once this is set you will no longer get this the following message.
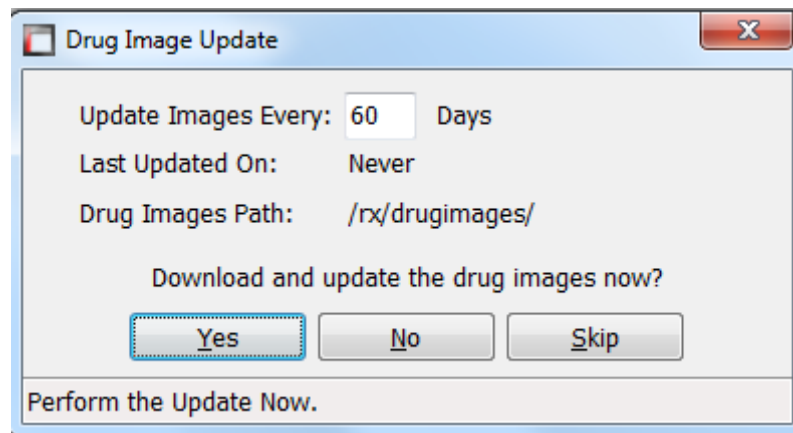
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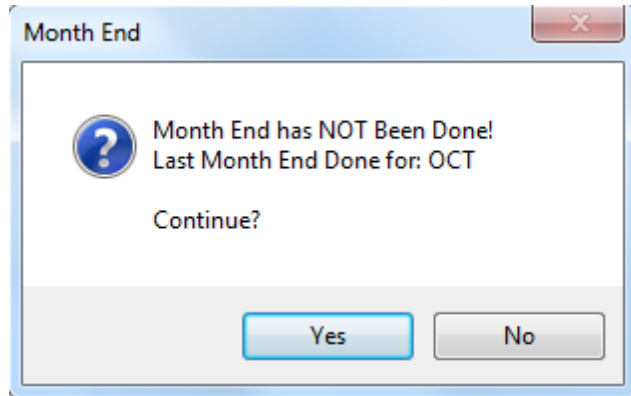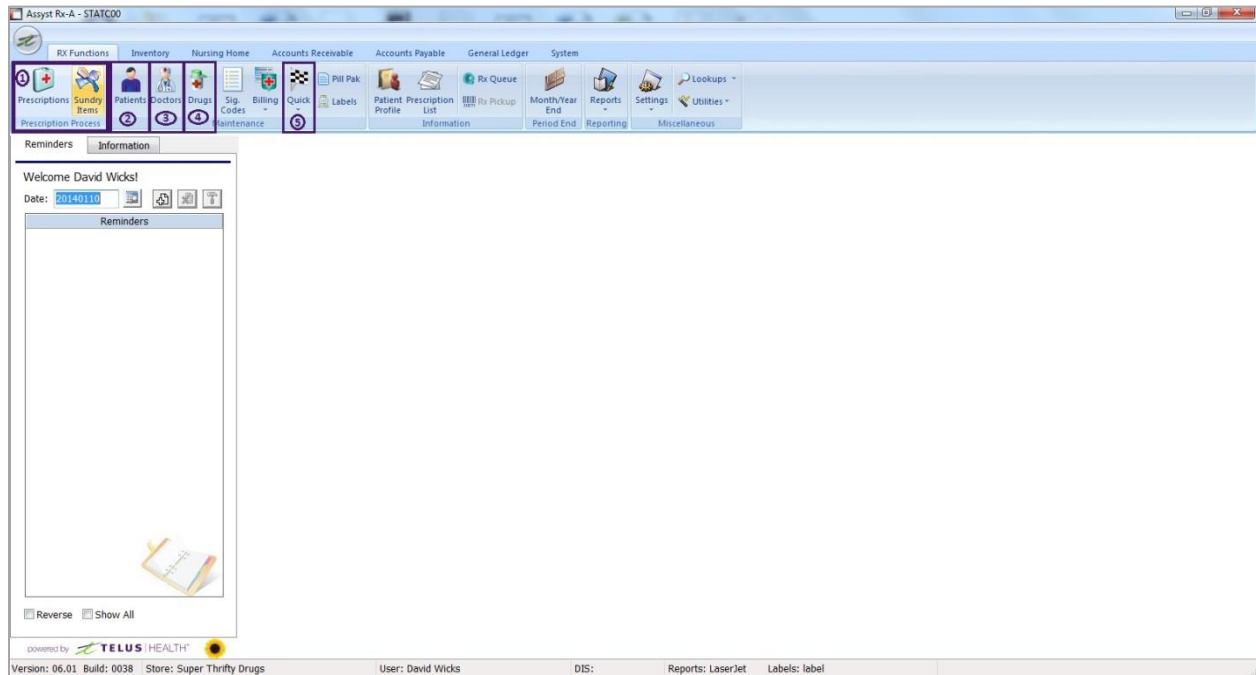
End of Month

If, in the previous month, the End of Month report has not been run, Assyst Rx-A will display the following message. Select Yes to continue to open Prescription Process, and select No to abort the opening of the filling screen.

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Overview of the Interface

This is Assyst Rx-A's main interface.

1	Prescriptions	This menu contains all the necessary tools to create, search and manage prescriptions. Information on this menu can be found in the Prescriptions section.
2	Patients	This is used to manage patients, create and delete their file in the system. Information on this section is found in the Patient Maintenance section.
3	Doctors	This is used to manage doctors, create and delete their file in the system. Information on this section is found in the Doctor Maintenance section.
4	Drugs	This is used to create drugs in the system, modify current information such as pricing, and manage inventory. Information on this section is found in the Drug Maintenance section.
5	Quick Maintenance	This feature allows users to quickly manage certain aspects of either drugs or patients. Information on this menu can be found in the Quick Maintenance section.

The tabs

A user can have up to 5 tabs opened at once, letting you work in up to five different menus at once. When more than one window is opened, the bottom of Assyst Rx-A will look like this:
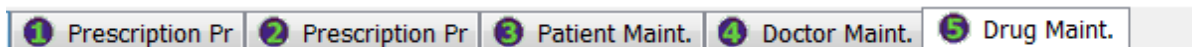
In the above picture, a user is working on two different prescriptions, has the patient, doctor and drug files open. You can easily switch between tabs by Alt and the tab number. Note that you cannot open the system settings window while there are tabs opened.

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Most common buttons

Throughout Assyst Rx-A are several buttons that fulfill the same purpose regardless of the menu they are found in. Most of these buttons also have a shortcut key associated with them. The following table presents these icons, explains their uses and gives the associated shortcut key, if any.

Icon	Name	Use	Shortcut
	SAVE	This will let you save any new information you have entered, or changes you have made in the existing screen.	CTRL-S
	CANCEL	This will let you cancel whatever step you are performing. This can also close the current window you are working in.	CTRL-Q
	ADD NEW	Allows the user to enter new information in the system.	CTRL-N
	DELETE	This will allow you to delete the information that is currently displayed on screen. You will receive a prompt to confirm you want to delete the information.	CTRL D
	PREVIOUS RECORD	Moves you back to a previous record.	
	NEXT RECORD	Moves you forward to the next record.	
	PRINTERS	Displays printers connected to your system.	F9
	EMAIL	Let's you send the information on screen in an email.	CTRL-E
	PAPER CLIP	Allows the user to attach documents/pictures to the current file. Attachment module must be activated.	CTRL-T
	NOTES	Allows the user to attach notes to the specific file.	SHIFT-F8
	PATIENT PROFILE	Clicking will take to the current patient profile.	F3
	CAPTURE SCREEN IMAGE	Allows the user to capture the information on screen and save it as an image. This can be saved to file, email or printed.	CTRL-SHIFT-P
	HELP	This is a future enhancement that is currently not available..	F1
	MODIFY	Allows the user to make modifications to the information contained in a file.	CTRL-M
	EXCEL EXPORT	Gives the ability to transfer the information into an Excel format.	CTRL-O
	DIS CONFIGURATION	Is used to configure the settings for DIS.	CTRL-D
	CREATE COPY	Used with Billing Calculations.	CTRl
	LOOKUP	Used as a search function.	

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Patient Maintenance

This section details all of the information related to patient files.

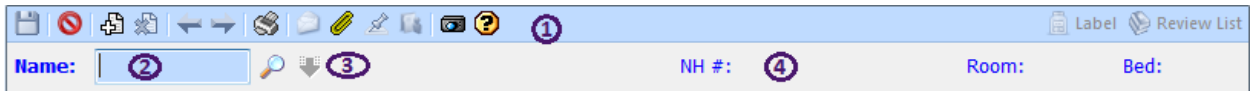## Overview

When you click on the icon, the patient maintenance window will open. The window looks as such:

Here is a brief description of each section:

Header

1	Buttons	The buttons found here are part of the common buttons found throughout the software. Their explanation can be found in the Overview of the Interface section.
2	Name field	Entering a name and clicking on the magnifying glass, or pressing 'Enter' will search for patients matching the name entered.
3	Down Arrow	Return to previously visited patient files.
4	Nursing Home information	If your patient is in a nursing home, once you are in his file, the nursing home information, such as the number, the room number, and the bed will be displayed here.

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Demographic

Last Name	This is your patient's last name
First Name	This is your patient's first name
Initial	You can enter your patient's initials in this field
Sex	This is your patient's gender
Phone #	This is your patient's phone number
Lookup	You can assign the patient a short code which can be used to search
Birthdate	Your patient's date of birth goes here
Address	There are two lines available for your patient's address
City	Enter the city your patient lives in here
Province	Province of residence
Country	Country of residence
Postal	Patient's postal code
Active Date	Date from which the patient's file has been active in the system.

💡 Did you know?

The information in both the Lookup and Initials field can be used to search for patients.

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General

| Family Doctor	You can enter the name of your patient's family doctor in this field
PHN	Your patient's PHN
A/R Account	You can enter the patient's charge account.
Comment	You can enter any comments about the patient file here.
Email	Enter your patient's email here
Keyword	This field is reserved for pharmacies in British Columbia

Did you know?

When you enter a doctor in the Family doctor field,
Assyst Rx-A will default for this doctor as a prescriber for your
patient's prescriptions.

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Groups

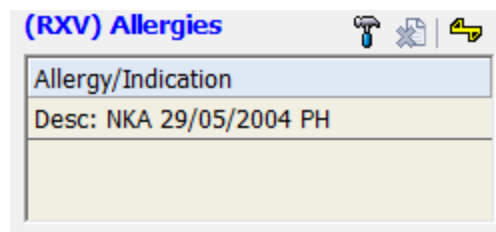You can create groups for your patients and also link up to 5 groups to a patient file.

Groups can also be individually coloured in order to refer to information more quickly. This is also done from within the group create field.

Groups (Max. 5)
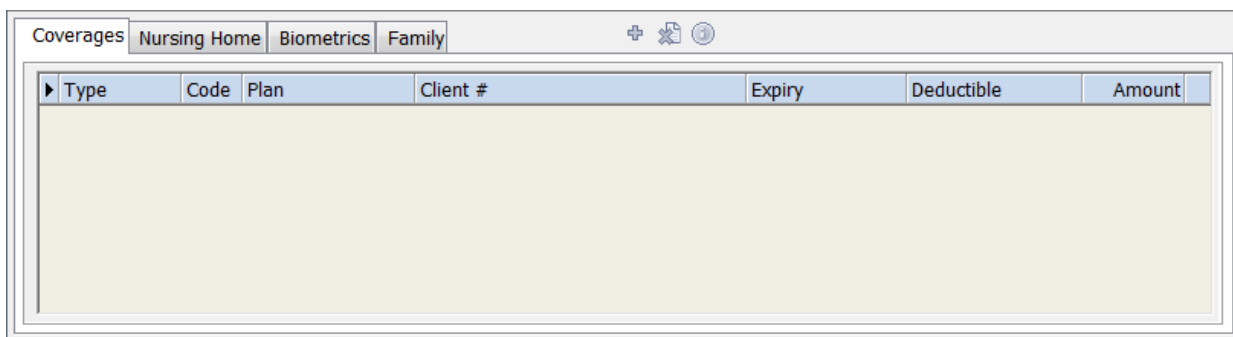
Code	Group
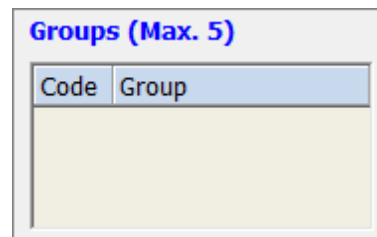
Allergies

You can enter your patient's allergies in this dialog box.

You can also Modify, Delete or Toggle the allergies view between two different screen displays.

(RXV) Allergies

Allergy/Indication
Desc: NKA 29/05/2004 PH

Tabs

| Coverages | Nursing Home | Biometrics | Family |

▶ Type	Code	Plan	Client #	Expiry	Deductible	Amount

The information contained in these tabs are detailed in their individual section later.

Searching for a Patient

There are different options when it comes to searching for patients. When you have the Patient search window open, you can change the search type from, NAME to LOOKUP to PHN by pressing the 'ENTER' key when you are in the search field.

💡 **Did you know?**

The comma (,) acts as a wild card in most searches. By placing a comma at the beginning of the search field, any information entered after will be searched in all fields. For example, typing ,555 will return everything that has 555 listed in a field.
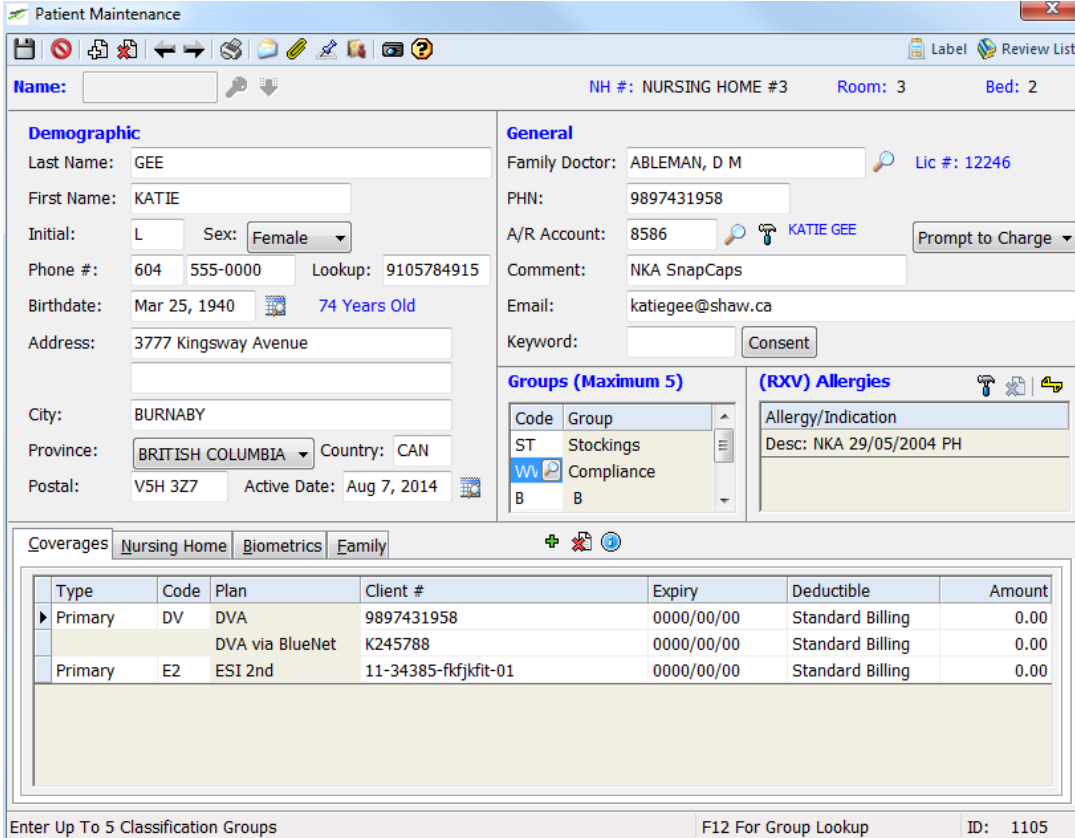
In order to search for a patient, simply type the name of your patient in the NAME field, or the short code in the LOOKUP field (if it has been entered previously during the creation process), or the patient's PHN in the PHN field. Then, press the 'TAB' key or click on the Magnifying Glass 🔍 icon. You can go back to the previous patient at any time (provided you have not exited the screen) by clicking the Green down ⬇arrow.

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Creating a Patient

Creating a patient is achieved in only a few simple steps.

In the Patient Maintenance window, click on the ADD NEW ⊞ icon.

Then, fill out the fields in the Demographic, and General section. For most of the fields, such as Country, Province, and City the information can be pre-populated in the settings so that you do not have to enter repeating information from patient to patient.

You can use the 'TAB' key on the keyboard or click with your mouse, to move from field to field. When the information has been entered, click on the SAVE 💾 icon to complete the process.
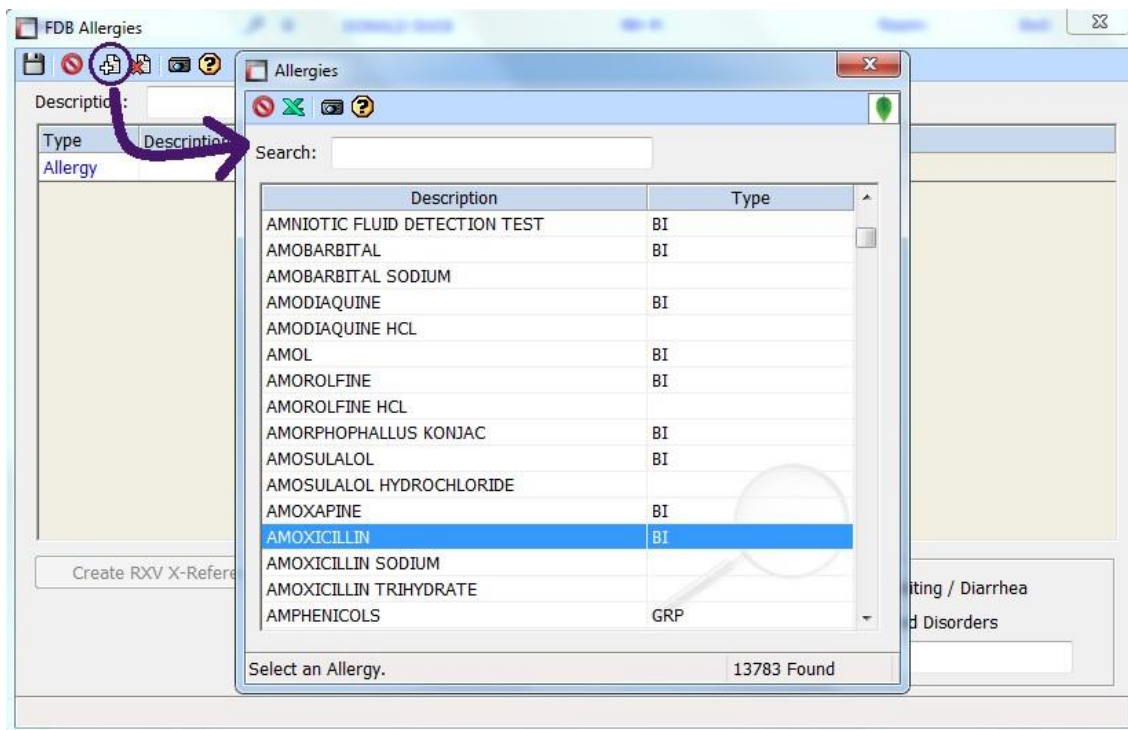
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Add/Remove an Allergy

Adding an Allergy

In order to add an allergy to a patient file, click on the MODIFY ⚒ icon in the Allergy section.
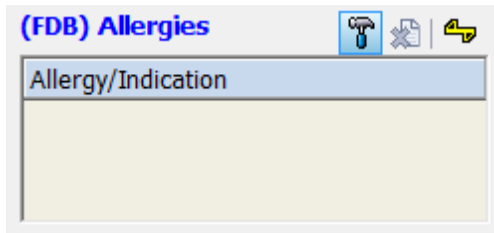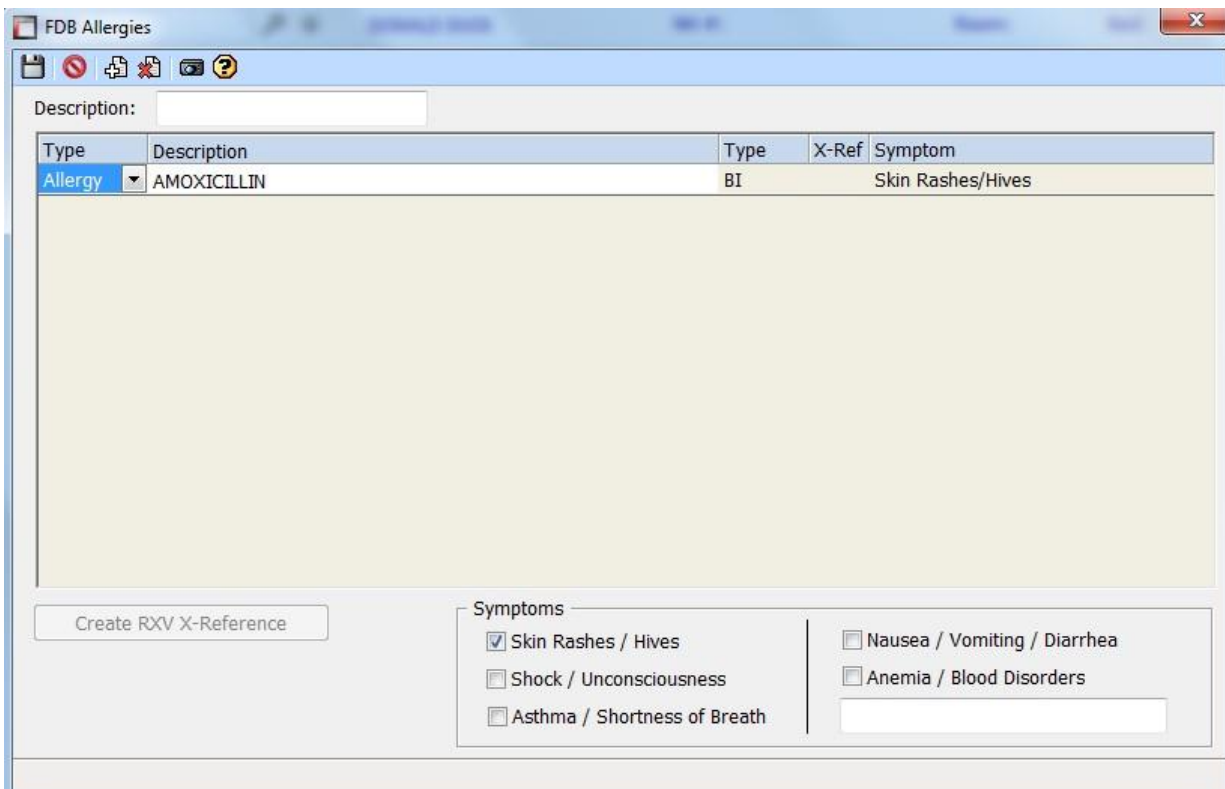

This will open a window. From here you can add allergies by clicking on the ADD NEW 🗗 icon. You may also give the allergy a description by entering the information in the description field.

This will open up a search window. You can start typing an allergy to add, and double-click on it in the list when you want to add it to the file. You will, however, have to give a brief description of the symptoms. This is done by using one of the check boxes, or entering free text in the blank field.
Once completed, click on the SAVE 💾 icon.

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Removing an Allergy

In order to remove an allergy from a patient file, click on the MODIFY 🔨 icon in the Allergy section of the patient file. The Allergy window will open. Select the allergy from the window.

It will highlight the Allergy red and a pop-up window will ask for your confirmation.

Say YES to remove the allergy or NO to cancel.

Click on the DELETE 📄 icon, then click on the SAVE 💾 icon.

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Enter/Delete an Insurance

Entering an Insurance

To enter a new insurance, select the patient file you wish to add an insurance to. This is located at the bottom portion of the patient maintenance window, under the Coverages tab.

To enter a new insurance click the Green plus sign (✚) located on the top middle of the Coverages window.

Using the drop down menu, select if it is a Primary or Alternate insurance. You can add a maximum of six coverages, using a combination of Primary and Alternate.

Next you have to choose the billing plan code. When you click in the "Code" field, this will give you access to a

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Magnifying glass. or (F12) This code is used to identify the type of billing. i.e. Insurance plan Formulary, Non-Formulary, OTC, etc.

The plan name that is displayed will come from your insurance set up under system settings.

Client #: This will be the Group and Plan number for the patient. With the cursor in this field, a coverage icon can be clicked to bring up the Patient Coverage window.

Clicking on the Change Card button will bring up Third Parties and associated client coverage cards. Once selected, you can then key in the client information exactly as you see it on their card.

Toggle Card View When clicked, will toggle between the card image and the entry fields with default third party data populated.

Set Card as Billing Default This will set the displayed card as the default in the billing calculations.

Assigned coverage information This portion is only used for overriding patient information, otherwise leave blank.

Arrow Keys Billing calculations can be pointed to more than one Third Party and these can also use different report format types. The arrows regulate this by allowing you to go cycle through the additional coverage info. If the arrows are greyed out, then all 3rd party billing calculations for the displayed Third Party are using the same Report Format Type.

DON'T FORGET TO SAVE YOUR INSURANCE! To save the information entered, click the 💾 on the top left corner of the patient screen.

REMEMBER: If using electronic billings, the totals per patient will be returned after adjudication.

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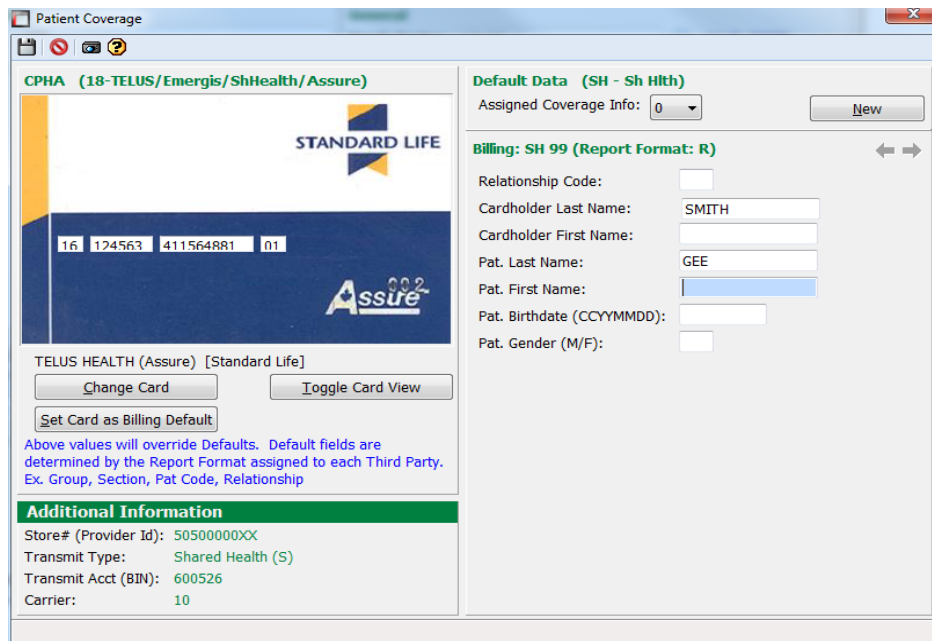
Nursing Homes

A nursing home can be assigned to a patient profile. Nursing home set up is done through the Nursing Home Module, which is a module separate from Assyst Rx-A.

To add a nursing home or facility to a patient file, click on the nursing home tab located on the lower portion of the patient maintenance window.

If you know the facility ID number, enter it now, or click on the Magnifying glass 🔍 icon to open the search window.

Once the desired nursing home is located, simply double click it to have it selected.

From here you can assign a contact person at the nursing facility; as well, as the room and bed number for the patient, any special diet plans, blood pressure readings, diagnosis and treatments.

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Biometrics

Using the Biometrics tab allows you to record certain aspects of your patients' life. This includes, Height, Weight, Creatinine Clearance rate, lifestyles, etc. As with the nursing homes, this is manually updated. You will have to make changes as they happen.

Biometrics can be colour coded to stand out during prescription process.

Did you know?

If you are using RX Vigilance, any check boxes selected will be integrated with Rx Vigilance for analysis and will print on the plain paper mar chart.

Family Management

This tab allows you to share certain general information that you would want to include in other family members profiles. This includes such things as Insurance plans, address and family doctor.

Deleting a Patient

To delete a patient. Click on the DELETE button (🗙). The software will always give you a warning asking if you are sure you want to delete the file. Click YES to continue with deletion of the patient, or NO to stop the deletion.

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Doctor Maintenance

This section details all of the information related to doctor files.

Overview

Clicking on the ![Doctors] button will open the doctor maintenance window.

Header

1	Name Field	Entering a name and clicking on the magnifying glass, or pressing 'Enter' will search for doctors matching the name entered.
2	Buttons	The buttons found here are part of the common buttons found throughout the software. Their explanation can be found in the Overview of the Interface section.

3	Doctor Icon	Brings up a list of licensed doctors to facilitate adding them to the system, any in blue are already added to the system.
4	Label Icon	Opens a screen when a label can be selected to print the doctor's information (defaults to the last label code set).but can be set

Maintenance

Billing #	Billing number for the doctor (number supplied by the insurance company, if needed)
Last Name	Last name of the health professional
First Name	First name of the health professional
Address 1	Mailing address of the health professional
Address 2	Secondary (or continuity or the previous) address of the health professional
Province	Province of practice of the health professional
Postal Code	Mailing postal code of the health professional
License #	Valid license number of the health professional
Phone	Contact phone number for the health professional
Fax	Contact fax number for the health professional
Allow Narcotics	Check this box if the health professional can order narcotics. Leave unchecked if not.
Active Date	Date on which the health professional was activated in the system

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Total Rx's	How many Rx's were prescribed by the health professional
Total $	How much money the total amount of prescriptions are worth
Pseudo ID	In cases where the insurance companies require a different license number than the one in the License field, the second license can be entered here
Reference	This identifies which order the health professional belongs too
Practice	Name of the health professional's practice
Comments	This is a free format field where you can enter comments on the prescriber
Email	Contact email for the health professional

> 💡 **Did you know?**
> _____
> The shortcut key to search for a health professional is F12.

Searching for a Doctor

Besides using the F12 keys, you can look up by Doctor name, Doctor number/License ID. Pressing enter will toggle between them.

Creating a Doctor

Following these simple steps will let you create a doctor.

Click the ADD NEW (⊞) icon at the top of the prescriber's window and fill out the fields in the Doctor Maintenance window.

When you have entered the data into the prescriber's profile, don't forget to click on the SAVE (💾) icon. You may make modifications to a health professional at any time. Simply select the desired professional; make your changes and then press the SAVE (💾 icon.

Deleting a Doctor

If you ever need to delete a health professional from the system, you can do so through the Doctor maintenance window.

Search for the desired health professional, with by the F12 key or the search field

Name: [ ] 🔍 ⬇

After locating the desired prescriber, simply click the DELETE icon, (❌) located at the top of the window. You will get a pop up asking if you want to delete this file.

Clicking YES will confirm the deletion of the prescriber, and clicking NO will cancel the deletion process.

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Drug Maintenance

This section contains all of the information pertaining to the drug file.

Overview

When you click on the [Drugs] button, the drugs maintenance window will open. It will look as such:
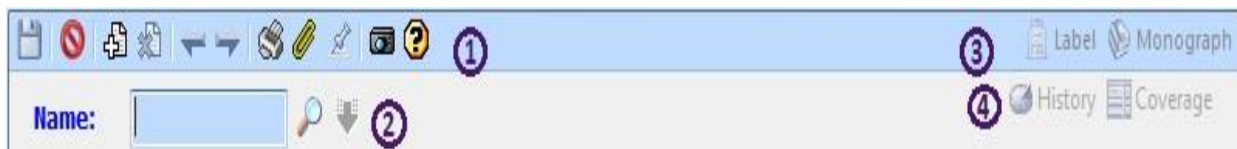

Here is a brief description of each section:

Header

1	Buttons	The buttons found here are part of the common buttons found throughout the software. Their explanation can be found in the Overview of the Interface section.
2	Search field	Entering a name and clicking on the magnifying glass, or pressing 'Enter' will search for drugs matching the name entered.
3	History and Coverage	These buttons are described at the end of this section.
4	Label and Monograph	These buttons are described at the end of this section.

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General

DIN	Drug Identification Number
Name	Brand Name of the product
Generic	Generic name of the product
UPC	Universal Product Code
Substitute	YES, NO, or AUTO. Lets you link another drug to the current drug if you want to use it as a substitute. If AUTO, the software will select the substitute for you if your inventory for the current product is not enough to fill the prescription.
Drug Code	Identifies if the drug is Formulary, Non-Formulary, etc...
Front Store	Identifies the product as being an OTC
Lookup	Assign a short code to be used to search for this product.

Characteristics

Colour	Colour of the product
Shape	Shape of the product
Size	Size of the product
Imprint 1	Any identifying marks on one side of the product
Imprint 2	Any identifying marks on the other side of the product
Route	Route of administration of the product

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Specifics

Form	Format of the product (caplet, tablet, etc.)
Location	You can enter the location of the drug in your pharmacy
Manufacturer	The maker of the product
Lot #	Allows the user to keep track of the lot numbers of the products used. This is a manual entry and if being used has to manually changed
Expiry	Allows the user to keep track of the expiry date of products they use. This is a manual entry and if being used has to manually changed

Inventory

Pack Size	How many tablets, caplets, ml, etc. that are contained in 1 pack
Cost 1	By default, the formulary cost of the product
Cost 2	By default, the non-formulary cost of the product
Cost 3	By default, the OTC cost of the product
Updated	Date used to show the last time any modifications have been made on the drug file
On Hand	This number lets the user know how many tablet, caps they have in inventory
On Order	This number lets the user know how many tablets are on order and not yet received
Minimum	Used in maintaining inventory, this number tells the system the lowest amount of the product that can exist on hand. Once it goes below this number the system will add this drug to your order list.
Maximum	Identifies to the system the highest number of a certain drug you want to keep in inventory. This works with the Minimum, to determine how many bottles of a product to order.

Active	The last date the drug was filled in prescription process
Counted	The last date an inventory count was done for the drug

💡 **Did you know?**

When filling a prescription, you may choose to use either Cost 1, Cost 2, or Cost 3.

The Buttons

Label	This allows you to print out a label with the drug information as contained in the drug file.
History	This button will display the overall usage of the drug for the past year. The End of Month must have been run in order for this button to work.
Monograph	Lets you view and print the drug information for this product.
Coverage	This display drug coverage for this product.

Flags Tab

Flags are used to give more information on drugs.

The type menu allows the user to specify if the product is a device, or a Natural Product. The schedule field is used to input the AHFS class of your product.
You can also use the check boxes to identify your product further by marking it as a Narcotic, a controlled substance, needing a triplicate prescription, etc.
The menu on the extreme right of this window is used to identify the product as a compound or not.

Ordering Tab

The ordering tab allows the user to assign certain vendors to the drug.
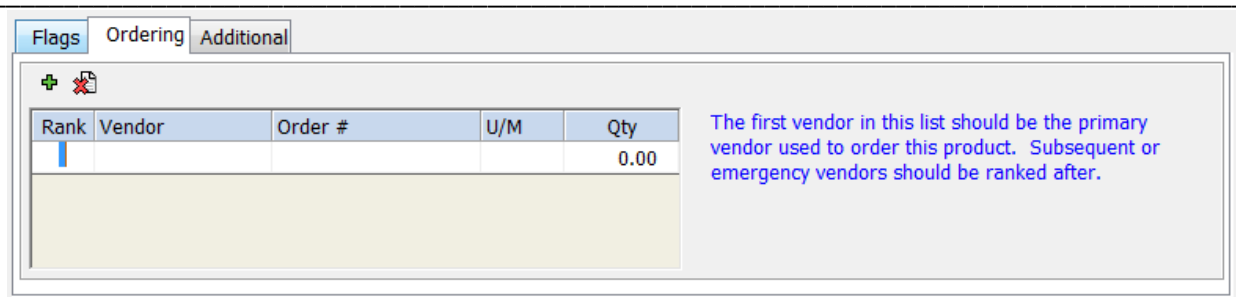
To enter a vendor for a drug, click on the Green Plus Sign ✚. The rank is used to give priority to a vendor over the others, if more than one are entered. By giving a vendor Rank 1, you tell the software that this vendor is the main supplier for the medication. Other vendors, if used, will be given different ranks.

Under vendor, enter the name of the vendor. Clicking in the vendor box, then on the Magnifying glass icon will open up a search screen. Any vendors you have in the system will be displayed at this point.
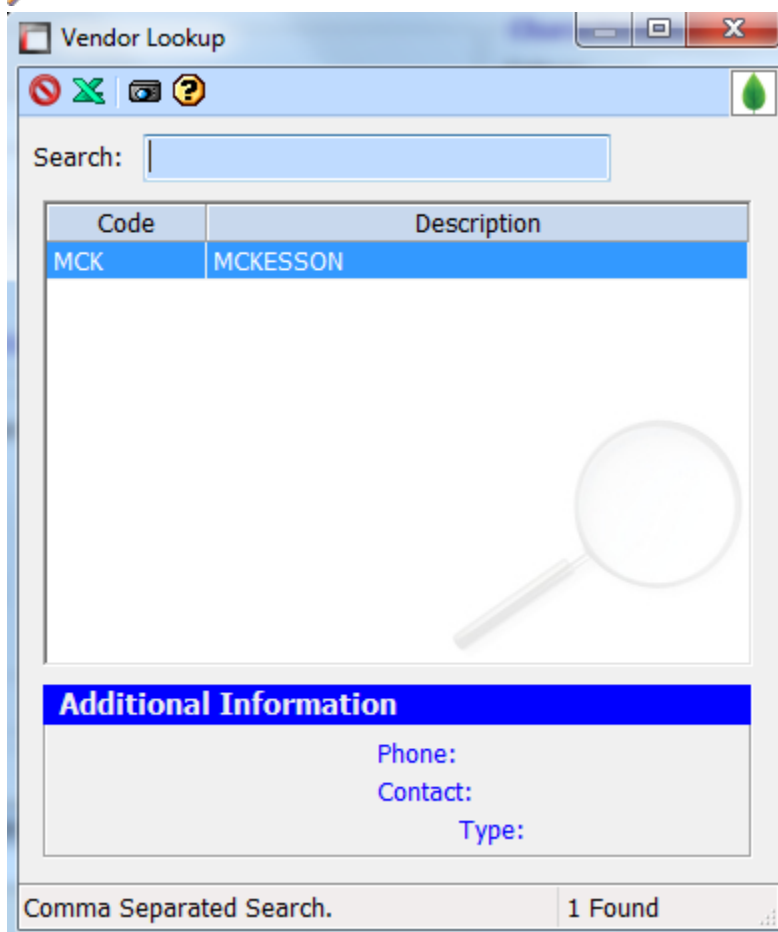
As in the above window.

Next, enter the Order number. This is a number that is supplied by the vendor to identify the product when ordering.

U/M is the unit of measure. This is the pack size of the product, 500 tabs, for example. This is followed by the cost of the product.

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Additional Tab

Under this tab, you will find extra information for the drug, if needed. Such things as drug interaction codes, default sig, Baker cell location, if you are using this device, as well as supplemental information, this tab also acts as auxiliary labels (Take with food, for example).
NOTE: Remember to save any changes or additions you make.

💡   Did you know?

You can specify a certain Sig to be used every time you select a drug by changing its default sig.

Creating a Drug
Following these simple steps will let you create a new drug.

Click the ADD NEW 🗗 icon at the top of the drug maintenance window and fill out the fields.

When you have entered the data into the prescriber's profile, don't forget to click on the SAVE 💾 icon.

Searching for a Drug
Type in the name of the drug you want to find. Once again you can change the search criteria by pressing the ENTER key. You can alternate between
Name, DIN and Generic

Deleting a Drug
To delete a drug, open the drug maintenance window. In the following search field:

Once you locate the drug you wish to delete, use the DELETE 🗙 icon at the top of the drug maintenance window. You will receive a pop up asking you for a confirmation to delete the drug.
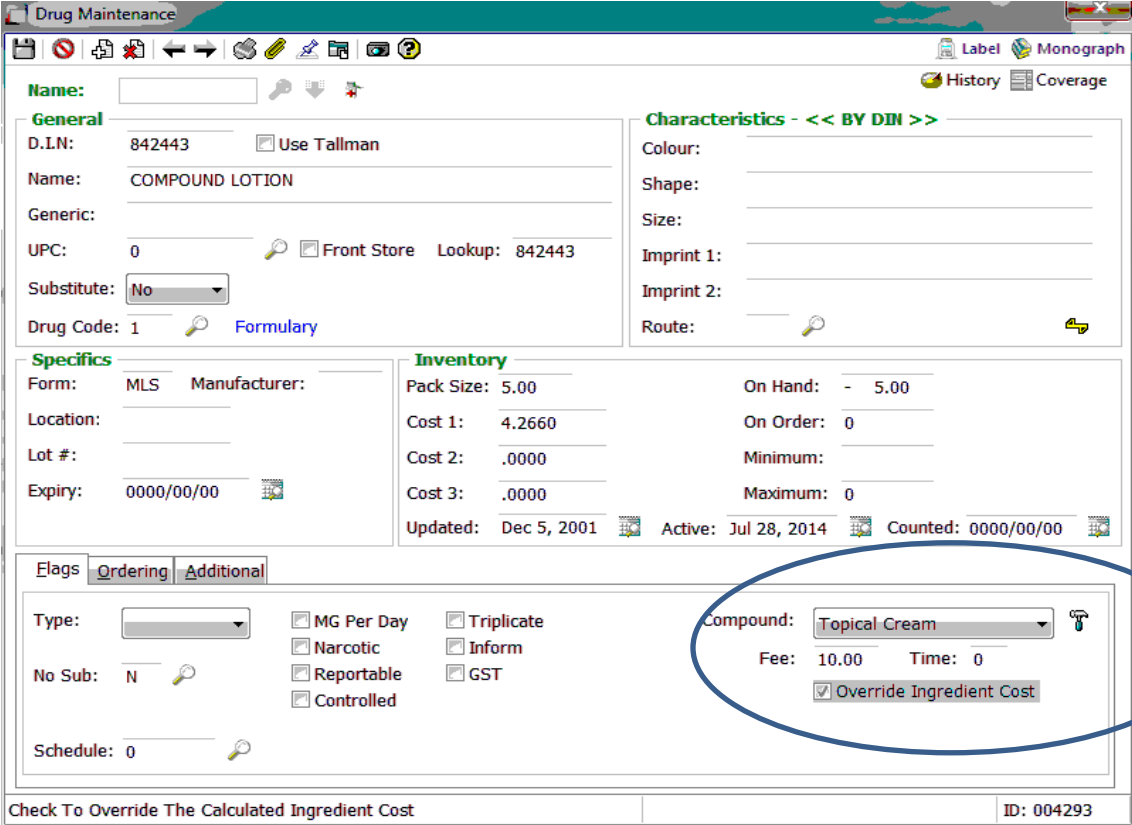
Pressing YES will confirm the deletion, NO will cancel the deletion.

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Compounds

Compounds are created the same way as creating a drug in the system.

Open the drug maintenance screen, and click the ADD NEW 🗎 icon.

There is more than one way to price a compound drug. A flat dollar value can be added on the drug card or a compound fee per minute can be added. The Compound Fee Per Minute will need to be added to the System Flags tab of System Setup.

Compound: Select from the drop down list the appropriate compound type.

Fee or Time: Enter the dollar amount to be charged for this compound or the amount in minutes it takes to make this compound. Select either Fee or Time, but not both.

Override Ingredient Cost: if checked, will allow cost 1 field to be modified. If unchecked, the cost level 1 is greyed out and the cost will be calculated on the ingredients

Use the 🔧 to bring up the compound ingredients. The ingredients need to be added into drug maintenance before the compound can be created.

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Quick Maintenance

There are two types of quick maintenance, Drug quick maintenance and Patient quick maintenance. They are used to make multiple changes to multiple files in one quick step.

Drug Quick Maintenance

In order to open the Quick Maintenance module, click on the Quick Maintenance button located at the top of your software.

Quick

Quick maintenance has multiple search criteria. They are under Primary Filters and Secondary Filters.

The first tab, Primary Filters, lets you search by drug name, generic name, quantity and other criteria. Each criteria has a start and end field. You can thus narrow down a search to only a handful of results.
Drug quick maintenance lets you search on anything that is located directly on the Drug Maintenance screen.

The bottom of the screen has two fields, #1 and #2. The information entered in these fields will display on the report.

You can then choose to print out the report, or simply show it on screen.

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> 💡 # Did you know?
>
> Should you want to reset the filters and start anew, simply click the Reset to Defaults button located at the top of the window.

When the search criteria is entered, click on the [Continue] button.

The Report

Above is an example of what the report looks like. In this example, the 2 criteria to be displayed are Billing type and Cost Price. Should you need to change one of those criteria, you can either click on each, or use the SHIFT key on your keyboard to select multiple entries.

Once your selection is made, right-click on the items and select Modify. A popup window will appear. For the purposes of this example, we are changing the billing type.

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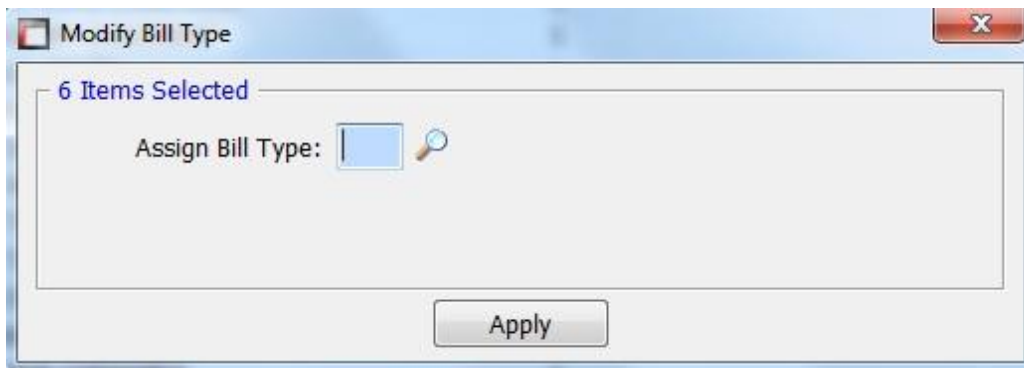
When modifying a criteria with the Quick Maintenance tool, you may click on the 🔍 icon to have a list of all the different variables that are available for this criteria. In our example, clicking on the 🔍 icon brings up the following window:
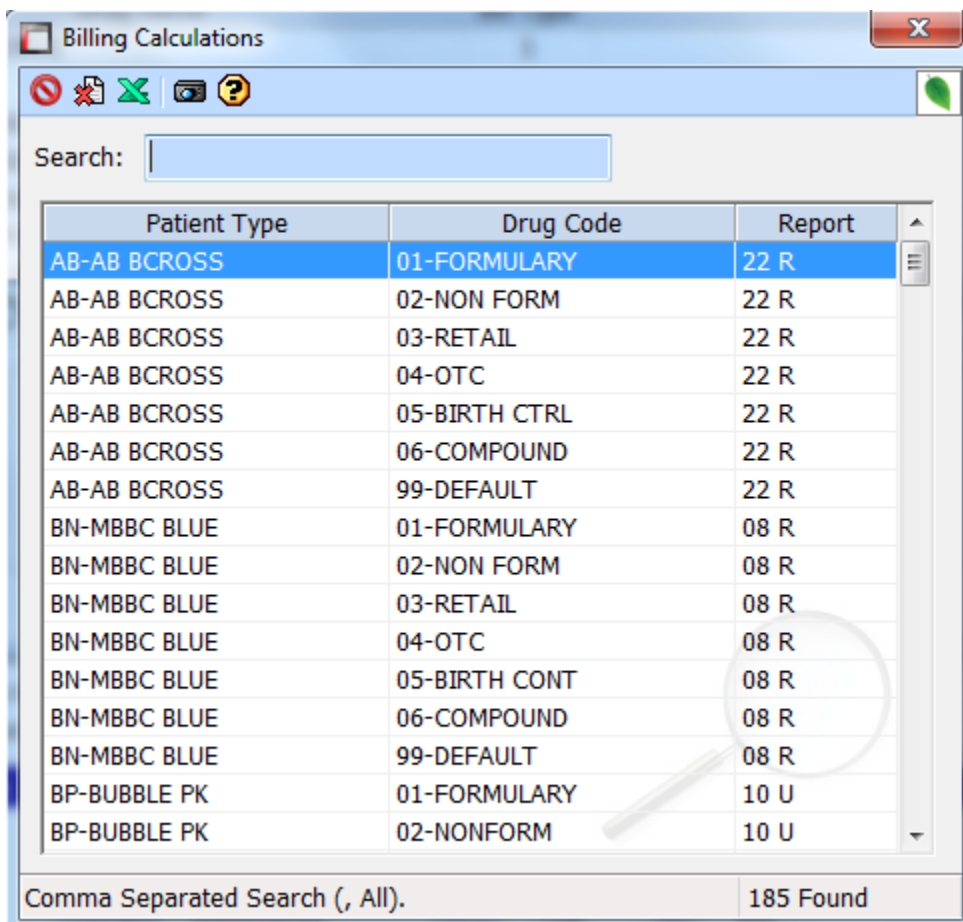
From the list, choose the item you want to apply, and click on the apply button.
The products you have selected to change will appear in blue on the list to indicate a change was made.

743224	TYLENOL COLD 80MG CHILDRENS	2	3.4699
870463	TYLENOL COLD DM CHILDRENS'	2	3.9900
743240	TYLENOL COLD LIQUID	2	6.1900
743267	TYLENOL COLD TABLET X.ST.	2	2.7199
743267	TYLENOL ES DAYTIME	2	4.7899
743275	TYLENOL ES NIGHTIME	2	4.7899

If you are sure of these changes, click on the SAVE 💾 icon. If you don't want to keep these changes, click on the CANCEL 🚫 icon. Once these changes are saved, they will be reflected on the drug file.

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Patient Quick Maintenance

In order to open Patient Maintenance, click on the Quick Maintenance   button, and select Patient Quick Maintenance.

Quick

The Patient quick maintenance feature is based off of the premises of the regular Quick Maintenance, with the only difference being the search criteria.

Patient Quick Maintenance also give the abilities to create reports, create lists of selected items and allow for data changes on ranges of criteria.

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Prescriptions

This section contains all of the information regarding prescriptions.

Overview

Clicking on the [icon] will open the Prescriptions window.
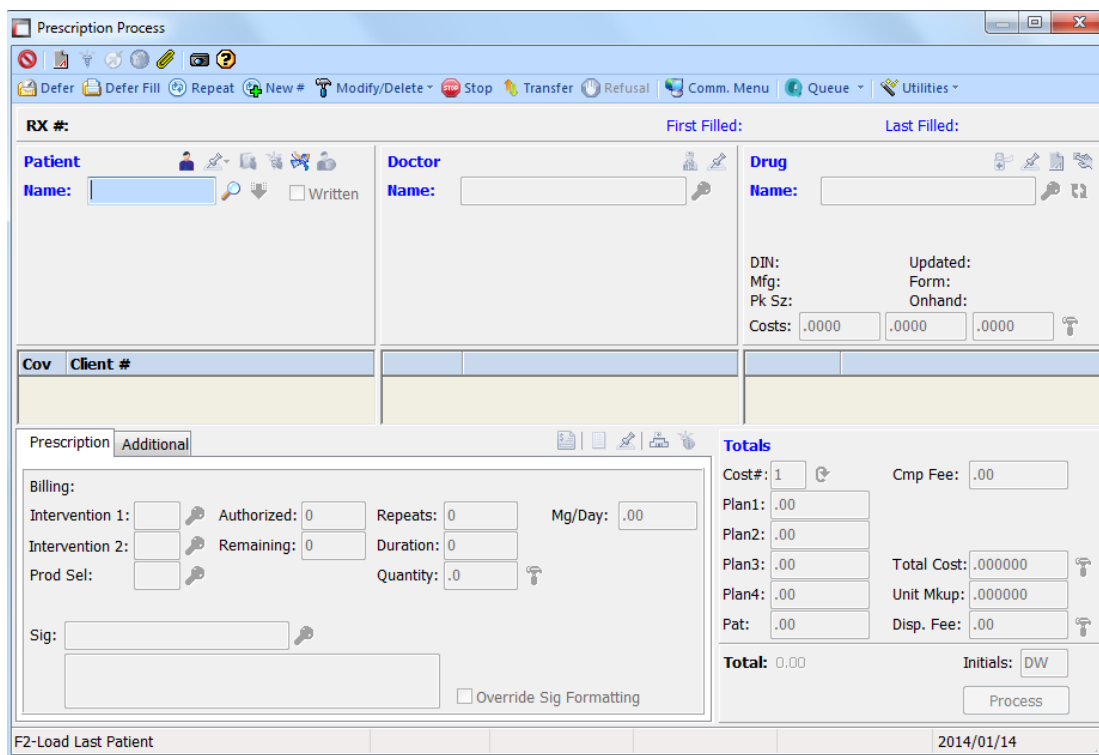
Buttons	These buttons are part of the common buttons found throughout the software. Their description can be found in the 'Overview of the Interface' section.
Defer	This button is used to defer a prescription
Defer Fill	This button is used to defer a prescription that already has a fill on it.
Repeat	This button refills a prescription
New #	This button copies a prescription
Modify/Delete	This button is used to either modify a prescription, or delete it entirely
Stop	This button stops a prescription
Transfer	Use this button to transfer a prescription
Refusal	This is used to perform a refusal to fill prescription
Comm. Menu	Accesses the communication menu for Third Parties
Queue	Use the Queue menu to batch multiple operations. These operations are detailed in the following sections.
Utilities	Additional functions are listed under this button. Price an RX, Bulk Labels, etc

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Header
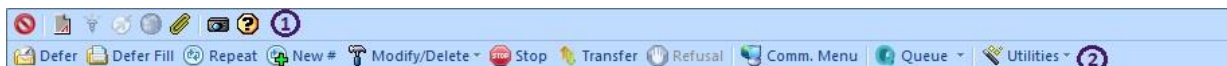
Patient Section
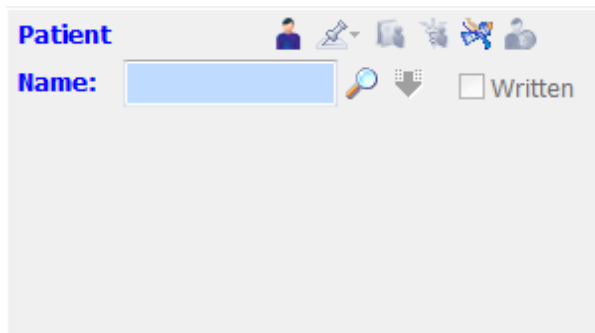
👤	This will take you directly into the maintenance screen for this patient. You can make changes to the patients file from here. (Ctrl + P)
✍️	This allows the user to add a note to the prescription, this can either be a patient note or a care note. By clicking the down arrow, will allow you to assign the note designation. (Ctrl + ALT + P)
📔	Access the patient's profile (F3)
⚕️	This will open the DIS profile of the patient.
🔬	Special items being added to the patient such as Toothpaste/Toothbrush. This is used with Nursing homes.
👤	Used to enroll patient in the PharmaSpace program. This is an add on module.
Search Field	Search for your patients using this field
Written box	Check this box if the prescription you are entering is a written prescription

Doctor Section
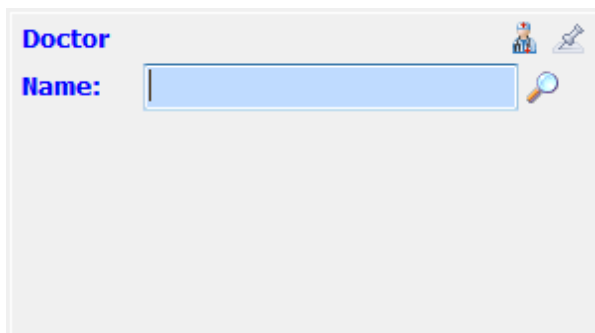
👥	This will take you directly to the Doctor maintenance screen for the doctor you have entered. You can make changes to the doctor file from here. (Ctrl + O)

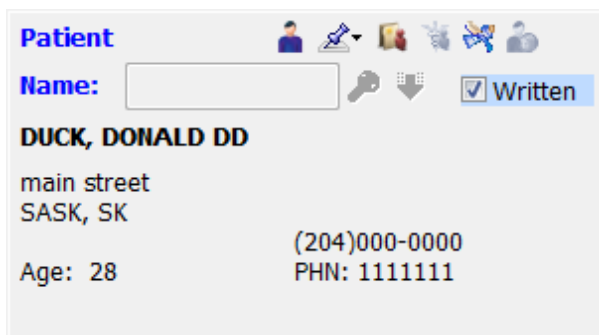| ![pen icon]	Allows you to add a note to the selected doctors file. (Ctrl + ALT + D)
Search Field	Search for your prescribers using this field

Drug Field

![drug icon]	This will take you directly into the drug maintenance screen. You can make changes on the drug file. (Ctrl + D)
![pen icon]	This is used to place notes directly on a drug file. (Ctrl + ALT + M)
![monograph icon]	Displays the monograph for the drug selected.
![hand icon]	This is no longer a valid option within the system.
Search Field	Search for drugs using this field
![substitute icon]	This button substitutes the drug for one of its generic equivalent
Drug Description	The drug's name, strength, DIN, costs, and other relevant information can all be found here.
![tool icon]	You can modify drug costs using this button. The changes will be reflected in the drug file as well.

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Creating a Prescription

Creating a prescription is a straightforward operation in Assyst Rx-A. You only need to follow these simple steps:
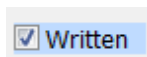
Enter a patient
Begin the prescription filling process by first selecting a patient.

This is done by entering the patient's name into the search field. Partial name entry is allowed. The search field can be changed from Name, Lookup or PHN. This is done by pressing the ENTER key when in the search field. Once the desired search information is entered you can either press the ENTER key to start the search or the TAB key.
Once your patient is selected, the focus moves to the 'Written' box.
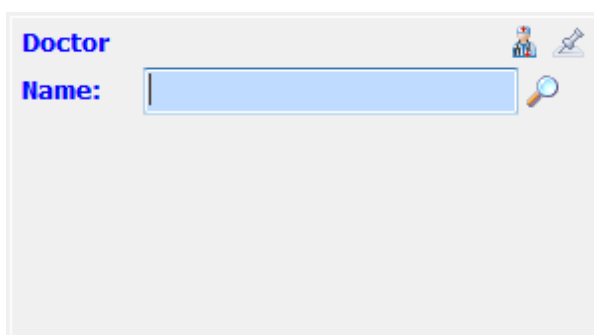
Did you know?
The 'Written' box comes checked by default. If you are entering a verbal prescription, make sure to uncheck it.

Pressing the TAB key will move you to the next step.
Enter a prescriber
Next, you must enter a prescriber.

This search can be performed on either the Name or License number of the physician. This is changed by pressing the ENTER key when in the search field. Enter the desired search criteria and either press the

ENTER key or the TAB key to launch your search. The 'Doctor Lookup' window will open.

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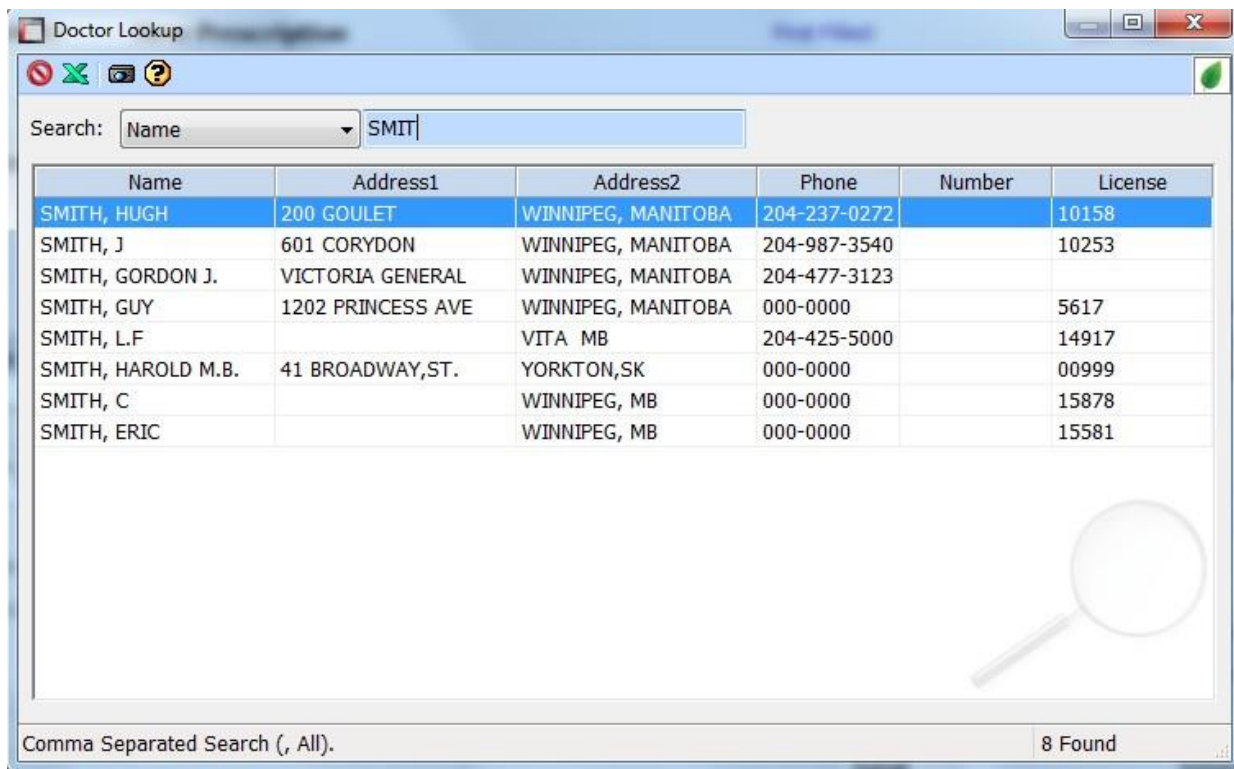
You can either use the down arrow key until you get to the prescriber you are looking for, or simply double- click on the desired prescriber using the mouse. You can also change your search criteria at any time by clicking back in the search field above.

If the prescriber you are looking for is not in the list press the CANCEL icon. This will give you the following pop up:
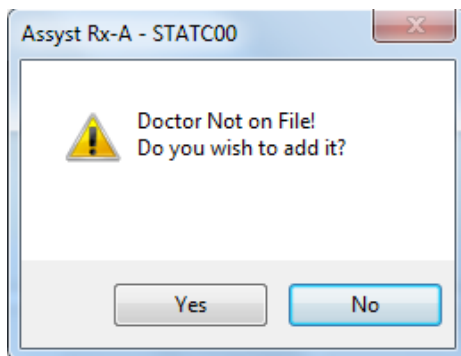
Clicking on the 'YES' button will let you add the prescriber to your Doctor File. Alternatively, pressing 'NO' will return you to the Prescription screen.

Once you have found the prescriber you are looking for, pressing the TAB key will move you to the next step.

Enter a drug

The next field is the Drug field.

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The search criteria for the drug can be changed in the search field by pressing the ENTER key. The default is set to NAME, the other options are DIN and GENERIC.

Enter the desired search criteria and either push the ENTER key or the TAB key to start your search. The Drug Lookup window will appear:

You can either use the down arrow key until you highlight the drug you are looking for or simply double- click it using the mouse. You can also change your search criteria at any time by clicking back in the search field above.

Located on the bottom portion of the Drug Lookup screen is an overview of the drug you have highlighted. This contains such things as Vendor information, on-hand quantities, etc.

If the drug you are looking for is not in the list press the CANCEL ⊘ icon. This will give you the following

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pop up:
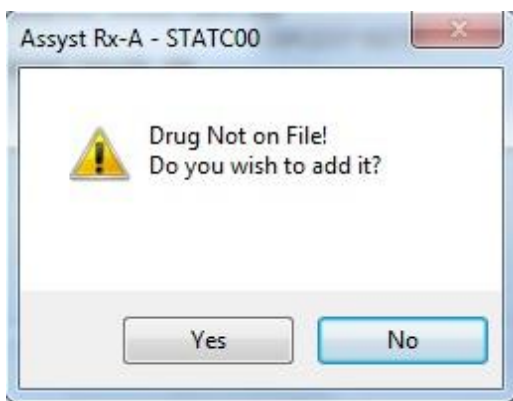
Clicking on the 'YES' button will let you add the drug to your Drug File. Alternatively, pressing 'NO' will return you to the Prescription screen.

Once the drug is selected the system will do its interaction checking at this point.

Interactions

If there are any interactions between the patient and the drug entered, the Interaction window will appear.
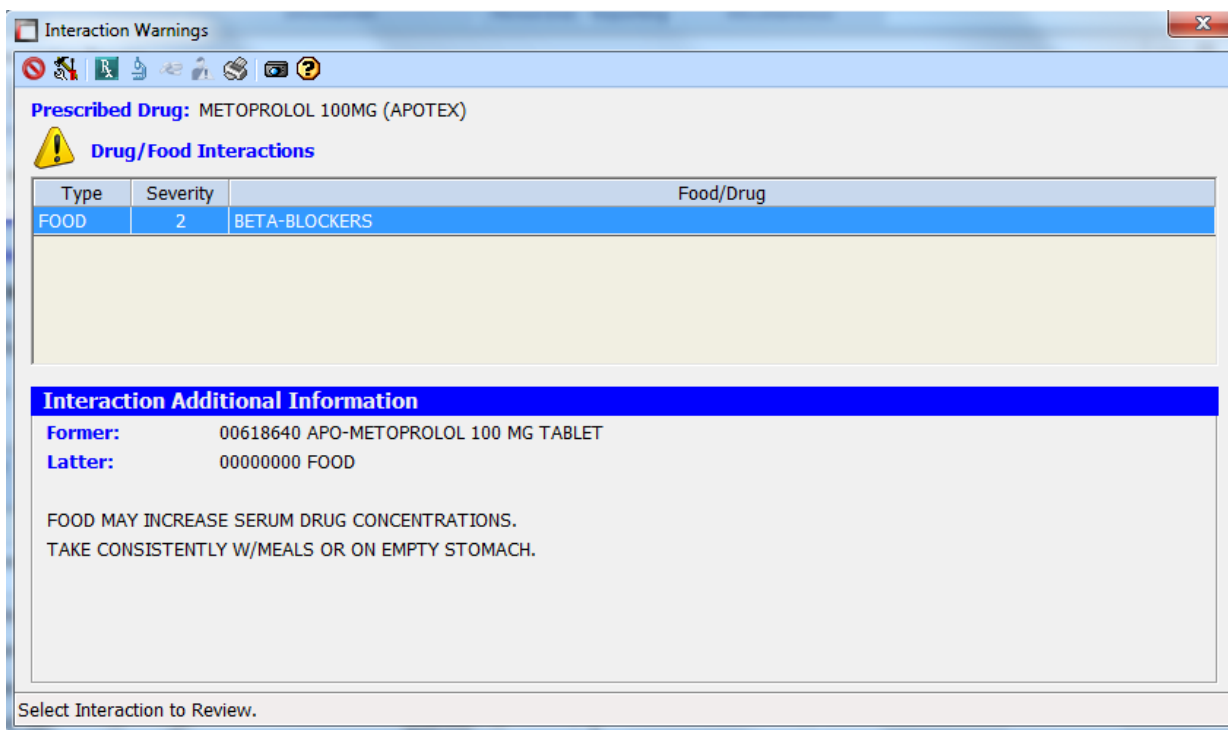
This Interaction window shows a warning with the Metoprolol that was entered in the above images.
From the allergy interaction screen you can access your setup screen for interactions. Click on the Setup icon located at the top left corner.

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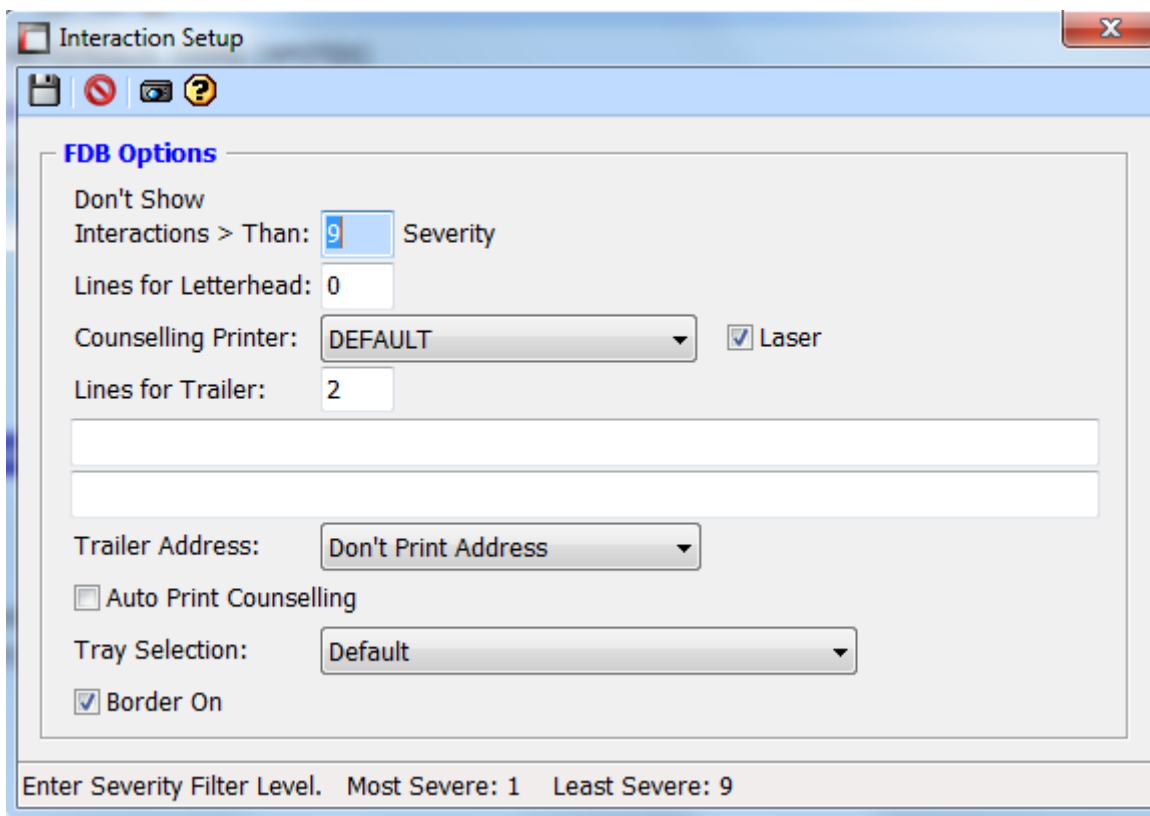
Interaction severity is based on a scale of 1 through 9; with1 being the most severe and 9 the least severe. If you don't want to see anything above a certain number, simply enter the number and hit the Save 💾 icon.

From the interactions screen you can also view the Patient Education sheet. To view it, click on the View ℞ icon. Here is an example of a Patient Education sheet:
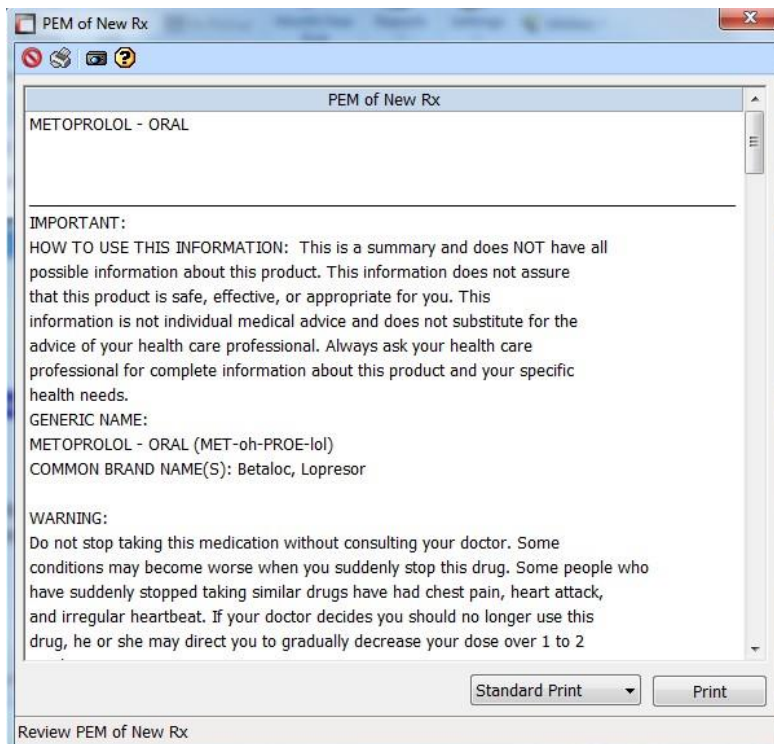
You may view more details on the interaction by using the PEM *interaction* *icon*.

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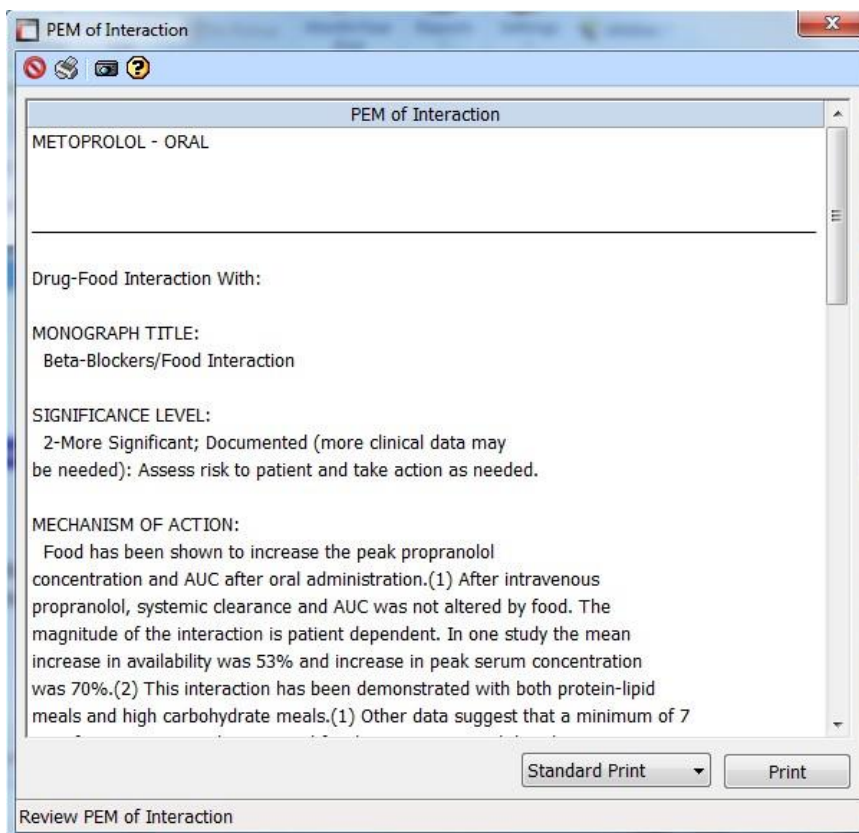
Enter Prescription Information

Our next step takes us to the Prescription tab. The cursor is placed in the 'Repeats' field.
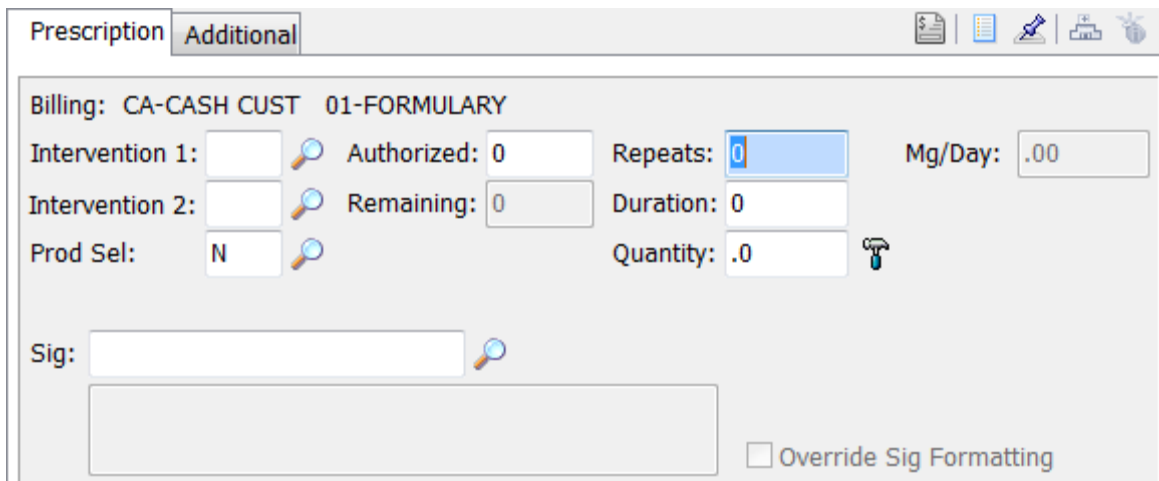
Enter the number of repeats, if applicable, on the prescription.

Duration; we need to enter the total number of days the prescription being entered will last. Then, we enter the Quantity. This is the total number of Tablet/Caplets needed to fill this prescription for this fill.

Once these numbers have been entered, the software will calculate the Authorized number. If the user wishes, he may put in the Authorized amount first, followed by Duration, then Quantity and it will assign the correct number of refills.

The above image indicates the customer is a cash paying customer. If the patient was covered under any insurance, it would be indicated here instead.

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Below this field are the Intervention 1 and 2 fields. These are used if you have to send an intervention code to the insurance plan. If you know the intervention, code you can type it in the field. Alternatively, you may search for an intervention code by simply pressing the Magnifying glass (🔍). This will open the search field.
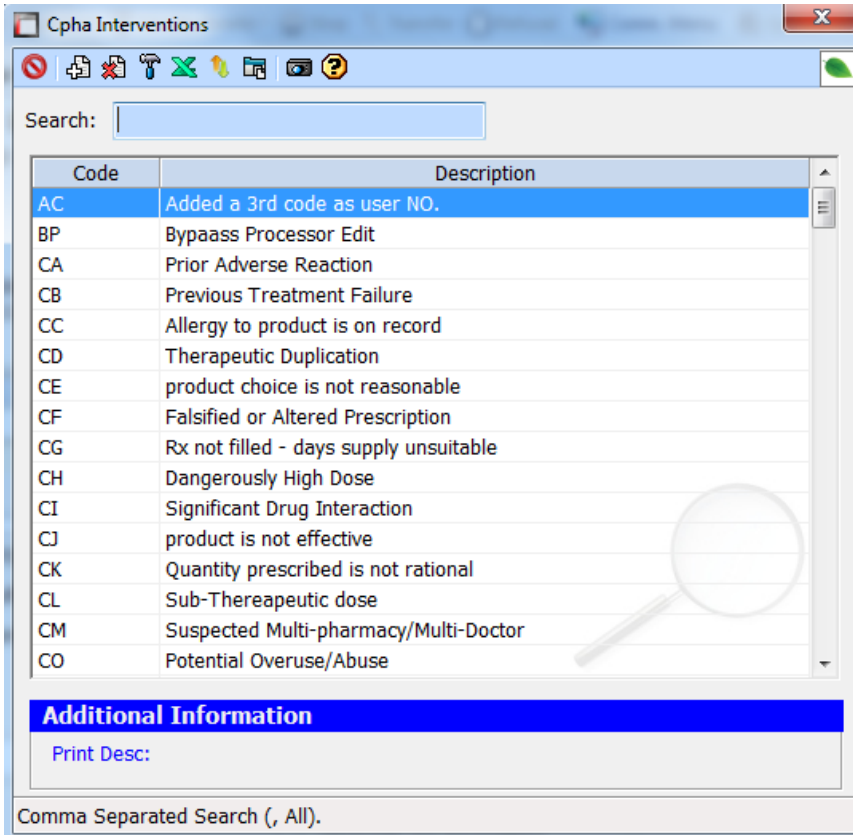
From here you can type the code you are looking for. To select the code, simply highlight the field and press the ENTER key or double click using your mouse.
The next field, Product Selection, is used in the case of No Substitutions.
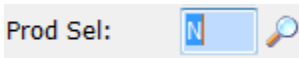
By default, it is set to N; meaning you are not using this field. By clicking on the Magnifying glass (🔍) If you are going to use this field your selection choices are:
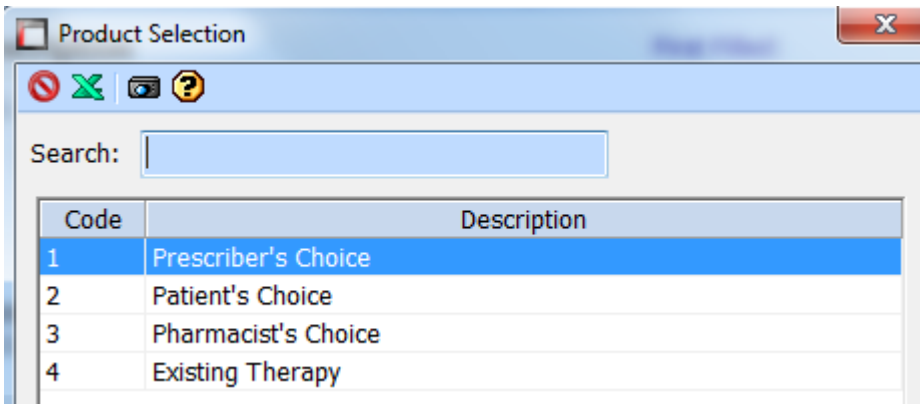
Entering the SIG is the next step.

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Enter the SIG

If you have all your SIGs already built in your system, simply enter the code you wish to use. (IE: Take 1 tablet once daily). It will be decoded and display what will print on the patient label, as with the above image.
If you are unsure of the SIG you want to use.

You can click the Magnifying glass 🔍 icon to open the search screen.

Sig: 1TQD 🔍

TAKE 1 TABLET ONCE DAILY

Sigcode Lookup

Search: TAKE 1 TABLET

Code	Description
1T	TAKE 1 TABLET
1T-01	TAKE 1 TABLET
1TQD	TAKE 1 TABLET ONCE DAILY
BC	TAKE 1 TABLET DAILY
BC-01	TAKE 1 TABLET DAILY FOR
FOS7	TAKE 1 TABLET ONCE WEEKLY

In the search field, you can type in what you are looking for. (IE: Take 1 tablet) This will start giving you results. You can use the down arrow key to highlight the SIG you wish to select and press the ENTER key, or you can select it by double-clicking it with the mouse.

If you enter a SIG code and it is not found in your system, it will ask if you wish to add it. If you want to create this SIG press YES. This will open the SIG code maintenance screen. Enter all the information required.

In the example we have assigned a SIG code of 111.

In the Directions field, we will enter the directions for the sig of 111. Take 1 tablet daily.

The Quantity Per Day is the number of doses for this SIG.

In this case it is only 1 dose per day. If it were Take 2 tablets daily, the Quantity would become 2.

Once the SIG is entered, don't forget to Save your work by pressing on the Save 💾 icon.

We are now taken to the Totals section for the prescription.

SIG Code Maintenance

Search:

SIG Code: 111

Directions

Quantity Per Day: 1.00

Last Active: 20140116

Enter SIG Code (Required)

Verify totals

This step is the last one before completing the prescription. You have one last chance to modify the cost of the prescription before moving on to printing the labels and adjudicating.

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This is telling us we are using Cost #2 that is on the drug file. Remember we can add 3 different costs on a drug file. If we wanted to change this to Cost 1, simply enter 1 in the field then push the Recalculate Totals button (

). The software will give a popup warning if the Cost Total is zero.

💡 **Did you know?**

If this were an insurance claim and we had amounts entered on the plans, it would be displayed in the 'Plan' fields. The 'Cmp Fee', would be used if we were creating a compound and we gave it a specific fee.

The system will display at all times the percent margin that is on the prescription being filled. At any point if you need to change the Total cost or the Dispensing fee, this can be done by clicking the Modify button located next to these fields. To complete the prescription, we have to enter the initials of the user creating the prescription and then press the Process button.

Printing Labels

You will now be brought to the Label Printing Window.

Labels can be set to a default. To get your label press the ESC key and your label will print.
This will complete the filling process for the prescription. The system will then ask if you want to continue with the same patient. This is a configurable option in Settings, to allow this prompt, to automatically continue with next patient or to never continue with same patient.

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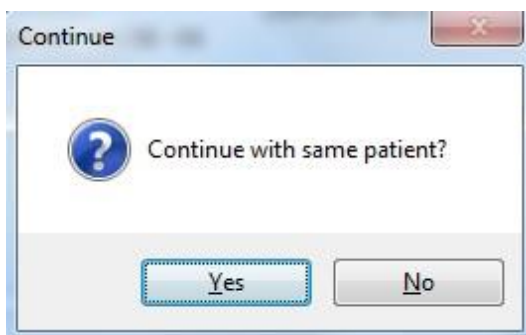
If you are filling more prescriptions for this patient, press YES. Otherwise, if you are finished with this patient and want to move to a different patient, press NO.

Cancelling a Prescription

There are a couple of ways to stop a prescription. Stopping a prescription shows up in the patient profile, it does nothing to the previous adjudication and allows a remark, as to why the prescription was stopped.

Stopping from the Prescription Tab

A quick way to stop a prescription is to select the prescription process tab and selecting the stop button (Stop) located at the top middle of the screen. Once this is selected, it will give you a pop up window where you can simply enter the RX number that you wish to stop. Once you have entered the number, click the OK [Ok] button to proceed to stop the prescription.

Doing this will activate another pop up window that will ask you for a "remark" as to why you are stopping the prescription.
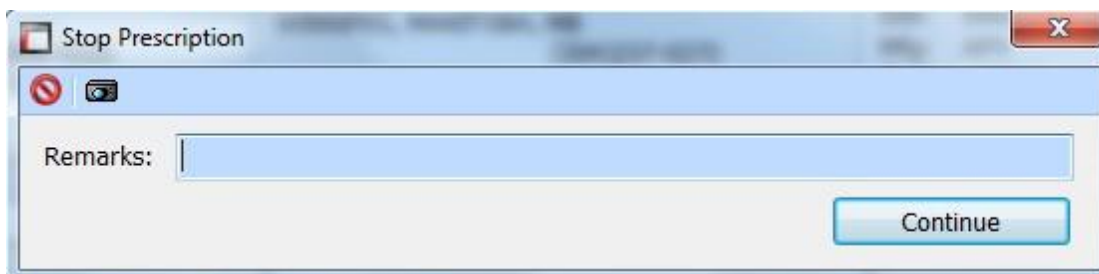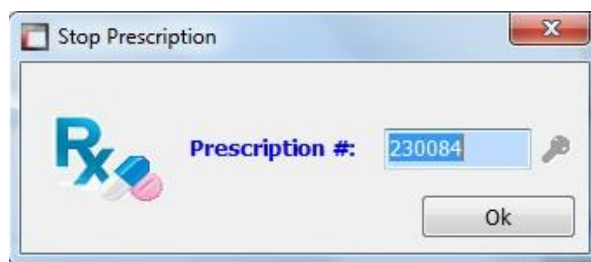
Enter your reason, then press the Continue button.

Once again, another pop up window will appear. This one will allow you to add additional notes on the prescription if you need to do so.

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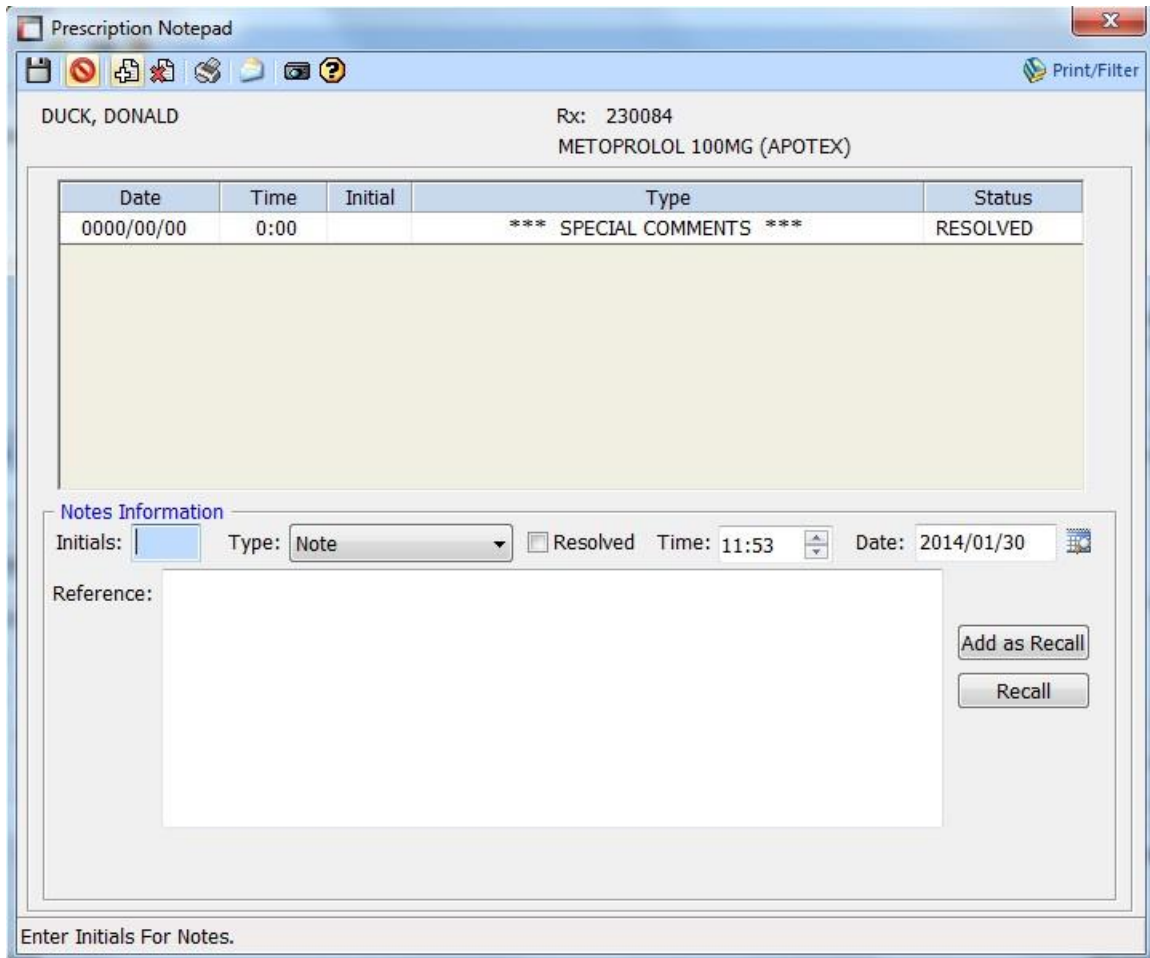
When you are done, hit the SAVE 💾 icon.

Stopping from the Patient Profile

Another way to stop a prescription is by accessing the patient profile from the prescription processing screen. This is done by clicking the profile 🖼️icon. This will open the profile screen for the selected patient.

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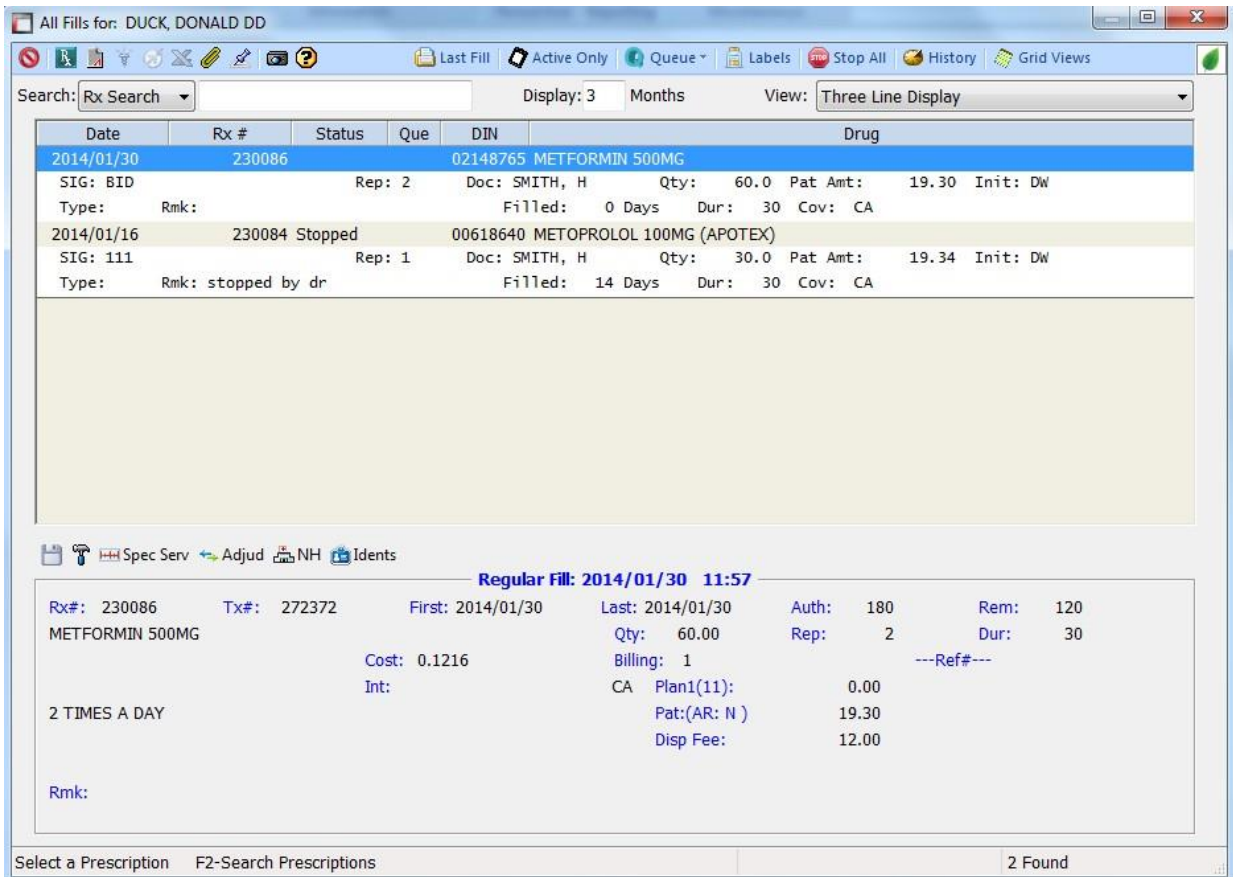
Highlight the prescription(s) you want to stop.

Clicking on the Queue button at the top of the window will give you a drop down menu.
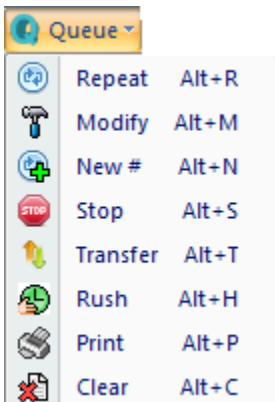
Go down and select the stop button. This will put the RX in queue to be stopped. You will notice in the profile there will be a "Q" under the QUE section of the profile, this is to show that this prescription has been assigned to the Queue file. Once you are done selecting the prescription, click on the Cancel ()) icon (This will not cancel what you are doing, it will just cancel the profile screen you are in.)
Once this is selected, it will take you back to stopping the prescription window.

_____
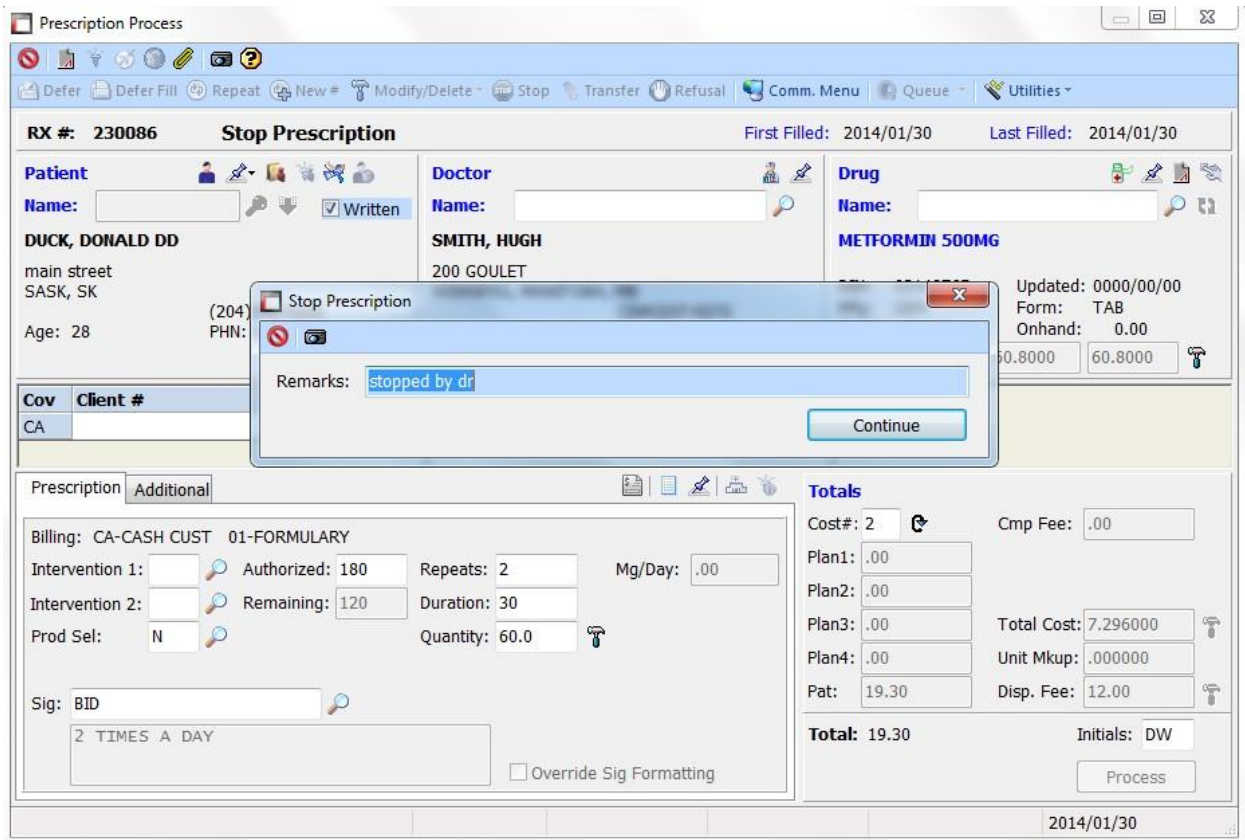
Continue, with the deletion for the prescription follow the above steps.
If you look back at the profile screen, you will notice the status of the prescription is now "Stopped"
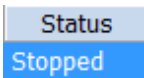
Did you know?

The following procedure can be used to clean up patient profiles and get rid of any old prescriptions.

You can also stop any prescriptions that are on file for a same DIN. This is done by opening the prescription process screen.

Select the patient you want to view. Once selected, click the profile icon. From the profile screen, select the Stop all button.
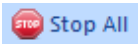
This will open a window, where you can type in the DIN of the drug you want to stop on the profile.

_____
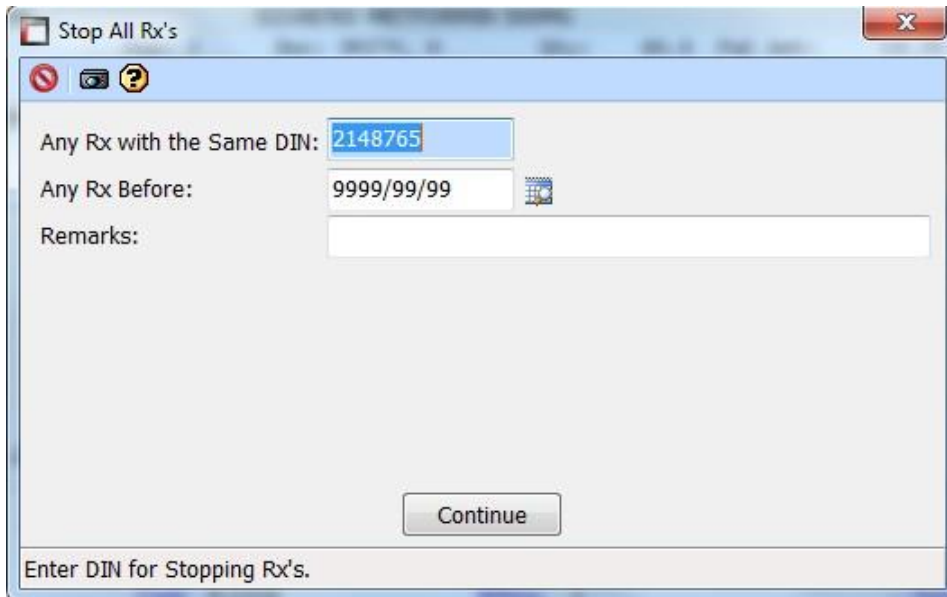
You can also enter a date criteria so as to only stop prescriptions with the entered DIN before a certain date. Click on the continue button to complete the stopping.

Restarting a Prescription

Once a prescription has been stopped and you need to restart it, take the following steps:
Open the prescription process screen.

Select the Modify/Delete button [Modify/Delete ▾]. Select the modify button from the drop down. Enter the prescription number you want to restart and press OK.
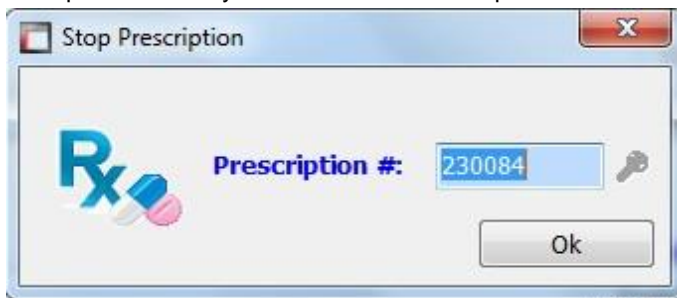
This will give you a pop up stating the prescription is stopped and if you want to continue.

_____

Press YES

Enter the users initials and press the process button.
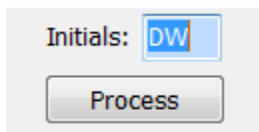
This will restart the prescription.

It can also be restarted by using the patient profile. When viewing the patients profile, highlight the prescription you want to restart.

From here select the Queue drop down and select Modify.
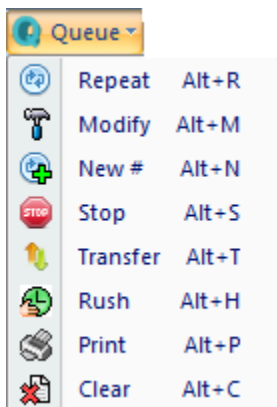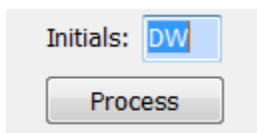
Once selected, press the Cancel icon. (Remember when using this button, it does not cancel what you are doing, it will only close the profile screen)

You will again get the pop up that the prescription is stopped and if you want to continue.

_____

Press YES.
Enter the users initials and press the process button.

Initials: DW

Process

This will restart the prescription.

Deleting a Prescription

Deleting a prescription permanently removes it from the system and reverses any adjudication associated with it.
Open the prescription process screen and select the Modify/Delete Modify/Delete ▾ button.

From the drop down menu, select the Delete function   ✖ Delete Rx   Ctrl+F5 .

Stop Prescription

Prescription #: 230084

Ok

This will give you a pop up window. This is where you enter the RX number you wish to delete.
Then press the OK button.

This will bring you to the prescription window. Enter the users initials and press the process button to complete the deletion.
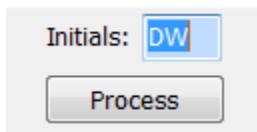
Refilling a Prescription

Refilling from the prescription processing screen.

Select the prescription process button .

Prescriptions

Once the process screen is open select the repeat button (↻) Repeat , located at the top of the screen. This will open the repeat Rx number screen.

Type in the prescription number you want to refill and press the OK button.
This will bring up the prescription and allow you to fill it. Enter the users initials and press the process button.

Initials: DW

Process

Refill from the patient profile.

Open the profile by pressing the profile icon.

Once the profile is opened, you can highlight the prescription you wish to refill and then click on the Queue button and select Repeat from the drop down.

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This will then assign a "Q" to the Queue status on the profile. This is to show the user that the prescription has been selected and put into Queue for some purpose.

This can be done for multiple prescriptions. You can add different options if need be. You can select one prescription for refill, one for modify and one for deletion.

Each time you process a prescription, it will ask if you want to fill the next in Queue.
By pressing YES, it will take you to the next prescription.

Did you know?
When viewing the profile, you can highlight the prescription and press a letter corresponding to the action you want to complete. The ALT key is not needed for this. For example, pressing "R" to repeat, "M" to modify. This will eliminate the need to use the Queue dropdown menu.

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Deferring a Prescription

Deferring a prescription is the action of putting a prescription on file for future filling.

When in the prescription process screen, follow the same steps as creating a new prescription, with one exception. At any point during the creation of the prescription, click on the DEFER [Defer] button which is located in the top left corner of the process screen. You will notice that the header on the prescription has now changed to DEFERRED.

RX #: 0230087   Defer Prescription

If at any point you have filled a prescription then realized it was meant to be placed on file as a deferred, click on the DEFER FILL [Defer Fill] button. This is located in the top left of the process screen next to the DEFER button. Defer from frill will reverse any adjudication already done on the prescription.

This will give you a pop up window, for you to enter the prescription number you wish to put on file.

Defer From Fill

Prescription #: 230087

Ok
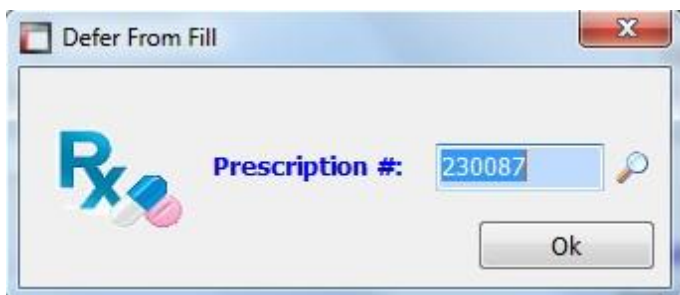
Once the number is entered press the OK button. This will take you back into the prescription process for this prescription.

To complete the step, enter the users initials and press the process button.

Initials: DW
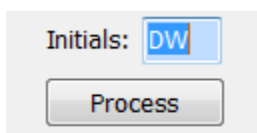
Process

When viewing the profile for the patient, you will notice the prescription now is listed as DEFER in the prescription status.

Status

Defer

_____
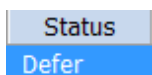
Transferring a Prescription

There is more than one way to transfer a prescription.
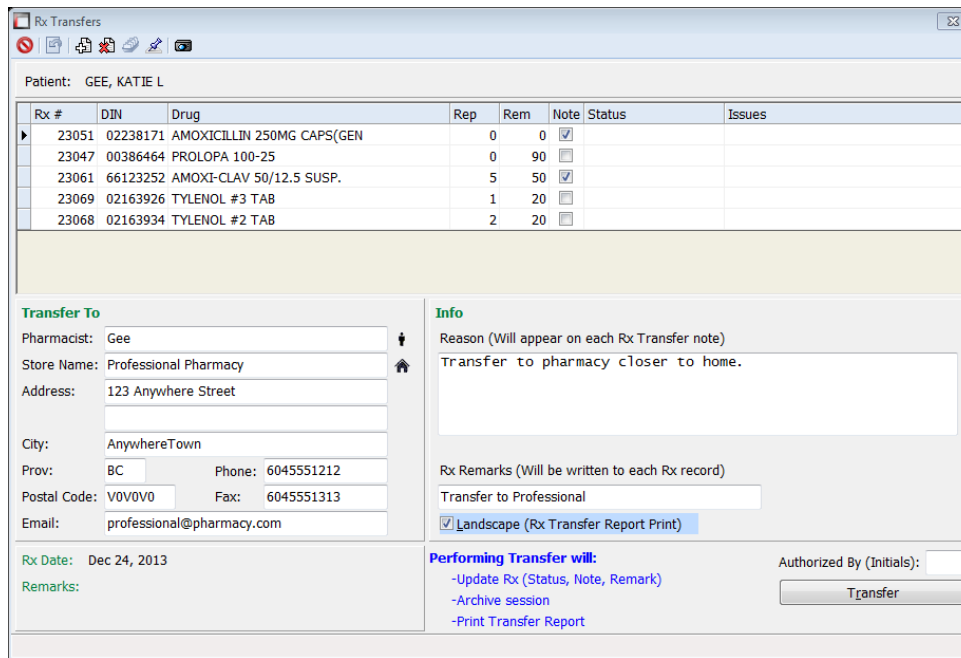
From Prescription Process

Prescription transfers are a one step process. The transfer and report will be done in one step and can be done for multiple prescriptions. Performing a transfer will update the prescription (Status, Note and Remark), archive the session and print the transfer report.

Information can be entered once and retrieved when a transfer is done. To accomplish this, two lookups are available: Pharmacist (person) and Store (Location) The person lookup can be linked to a location, so that the name store and address information can be populated quickly.

Open the prescription process screen. Search for the patient you need the prescription to transfer. Once the patient is selected, click on the TRANSFER 🐾 Transfer button, located at the top middle of the process screen. This will give a pop up window asking for the prescription number.

Transfers will show in a grid, the same as receiving. This will make it easier to see what pr4scriptions are being transferred. If a transferred prescription is selected a second time, a warning message will display.

Transfer sessions will now be archived and can be accessed with the 🗂 transfer icon. This means that a transfer session can be accessed for reprinting the report and field edits. No new prescriptions can be added to an archived session, although the archived transfer can be reversed from here, as well.

 Prescription Notes can also be accessed from the transfer screen by using the Notes ✒ icon.

When you look at the profile, you will see the status of the prescription is changed to "Transfer"

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From the Patient Profile

When on the desired patient, open the patient profile, by clicking on the profile ▨ icon. This will open the patient profile.

You then can highlight the prescription you want to transfer. Open the Queue dropdown and select transfer. Or, if you want to use the short cut, when you highlight the prescription, you can press the letter "T" and it will tag the prescription for transfer.

Once the prescription is tagged, you will see a letter "Q" under the QUE heading, this is to show you that the prescription is selected. If, at any point, you need to undo what you have selected, you can highlight the prescription again and press the letter "C", this is the CLEAR shortcut and it will remove the prescription from the Queue log. You can also use the dropdown menu and select the Clear option ▨.

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Copying a Prescription

When the need arises to copy a prescription, use the following process to have a new prescription that is identical to a prescription that is already on file, without having to enter a new prescription from scratch. Open the prescription process [Prescriptions] screen.

Enter the appropriate patient, click on the New # [New #] button located at the top of the process screen. This will open a pop up window, for you to enter the prescription number of the old prescription you want to copy.
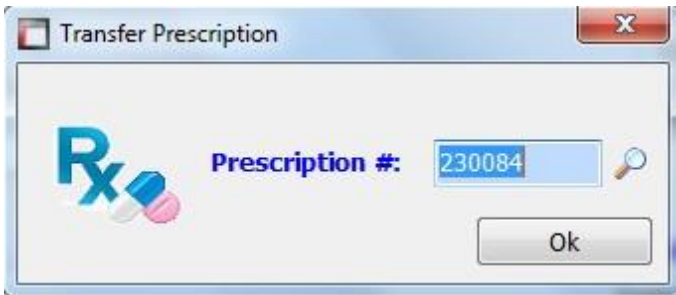
Once the number is entered, click the OK button.
If you need to make any changes, you can do so on the new prescription.
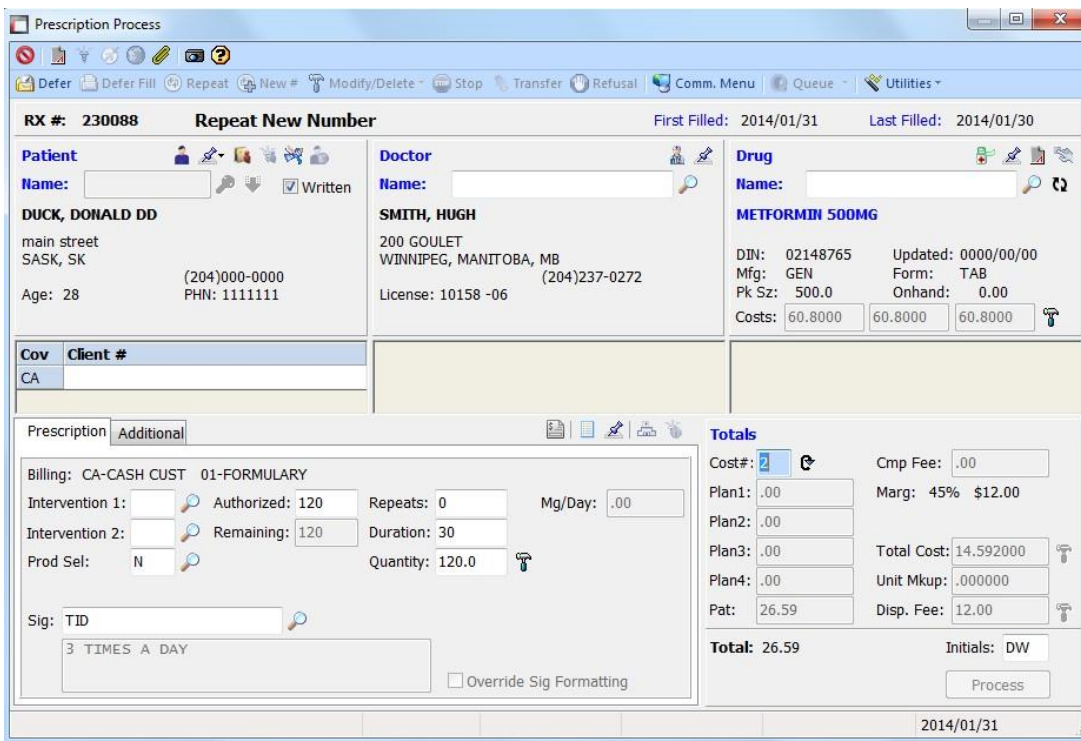
As you can notice at the top of the process screen, the status states "Repeat New Number" and the new Rx number, as on the following image:
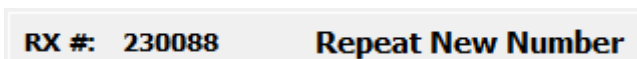
Once any changes, if needed, are made, enter the user's initials and press the Process button.

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Trial Prescriptions

Trial prescriptions are used if the patient is taking a trial drug and it happens to be covered by the patient's insurance.

Open the Drug Maintenance window and search for the drug you want to add as a trial.

Open the Coverage tab, located in the top right corner of the window, using the Coverage [Coverage] button. Now select the Add New 📲 icon.

By clicking in the "Pat" tab, you will gain access to the Magnifying Glass 🔍. This is your search feature for this field. This will allow you to select the insurance you want to use for the trial. The same step is used for the DRUG field as well.

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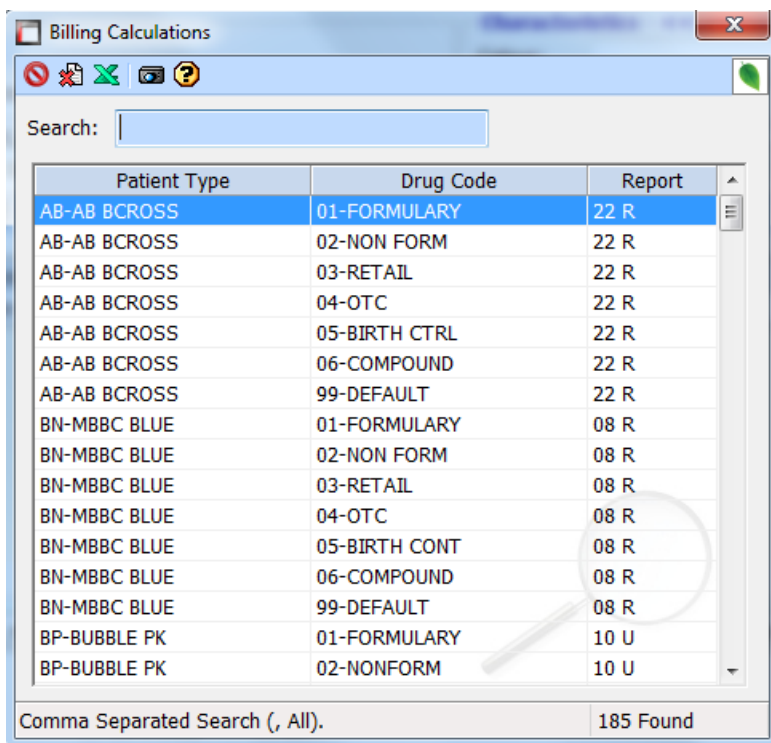
Once you select the Insurance plan, enter the DIN of the drug you want to use, followed by putting a check mark in the TRIAL box. You can then enter a Quantity. Your end result should look like the following:
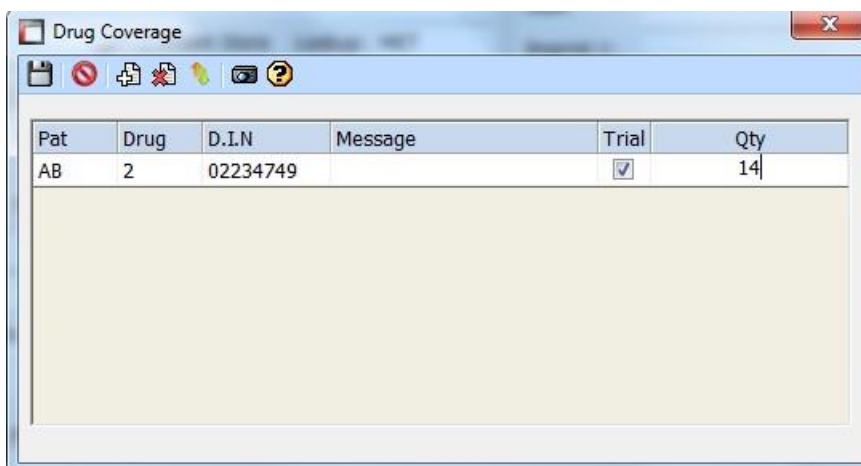
Once everything is entered, don't forget to press the SAVE 💾 icon to save the drug.

The next time you fill the drug you have entered, and sent to the insurance you have supplied it will be sent as a trial drug.
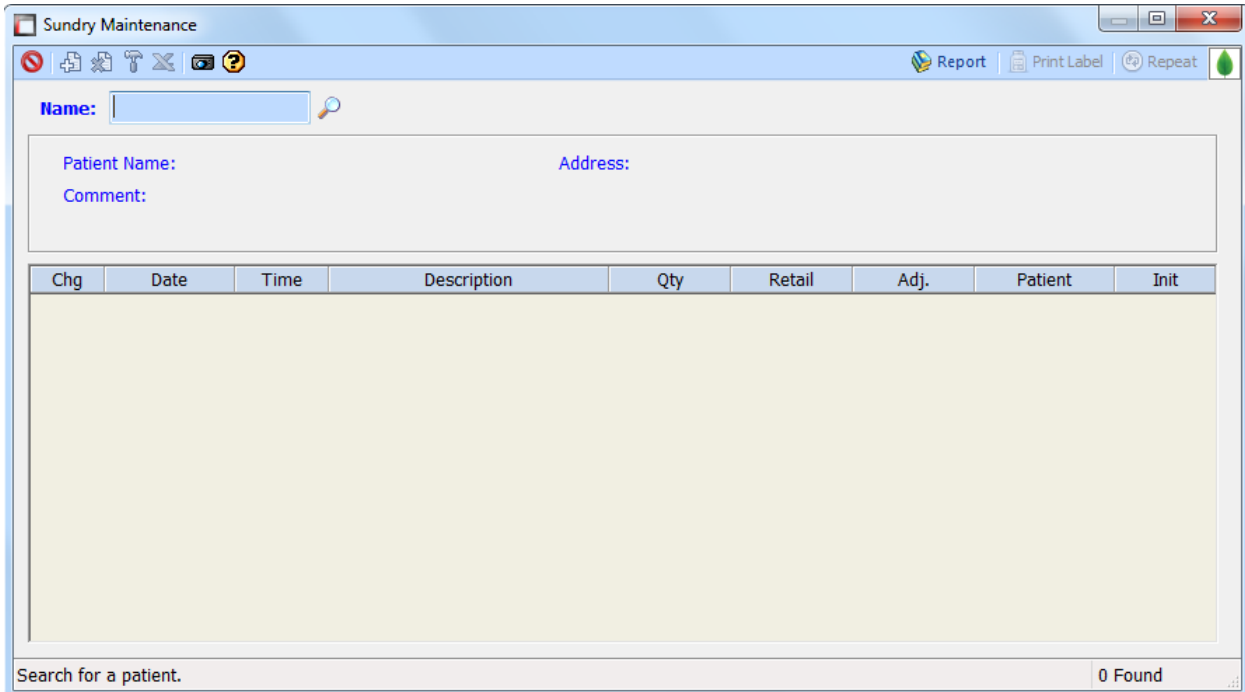
┌───┐
│ 💡   Did you know?   │
│───│
│   Not all insurance plans accept trial prescriptions!   │
└───┘

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Sundry Items
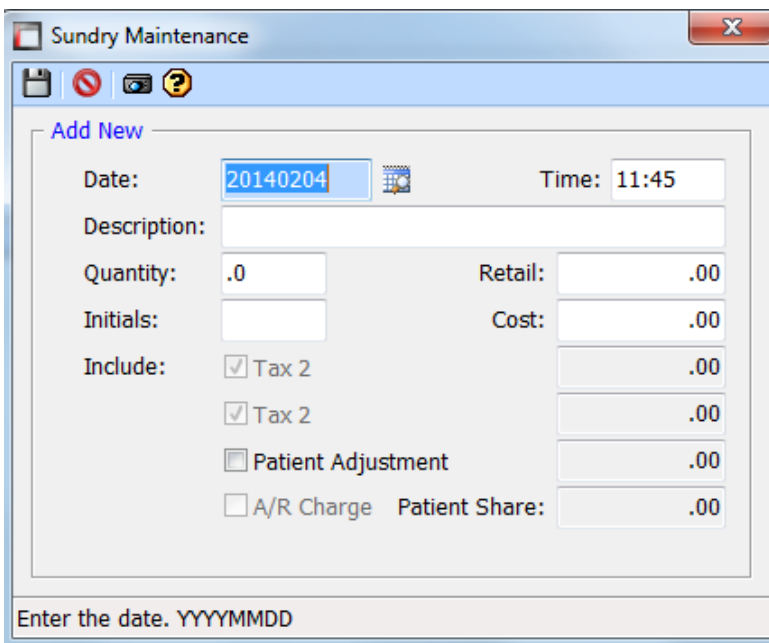
Sundry items are mainly used for items that you are sending out to nursing homes. This usually includes things such as Toothpaste, soap, etc. Items entered here will get a different charge then if the product was purchased directly off the shelf. This will not be entered on the patient profile.

Select the Sundry Items 🧹 button at the top left of the main screen. It will open the following window:

You can search by NAME, LOOKUP, or PHN. This will look for the patient you want to put the item on. When the patient is selected, it will open up a window to add the item.

In the Description field, enter what you are sending to the patient, followed by the Quantity and Price. Below is an example of 1 item:

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If the patient has an A/R account set up on file, it will charge the amount directly to the account, otherwise it will be treated as cash.

Once the item has been added, click the SAVE ⊟ icon. The next time you go into SUNDRY items and select the patient, it will display any item you have entered.
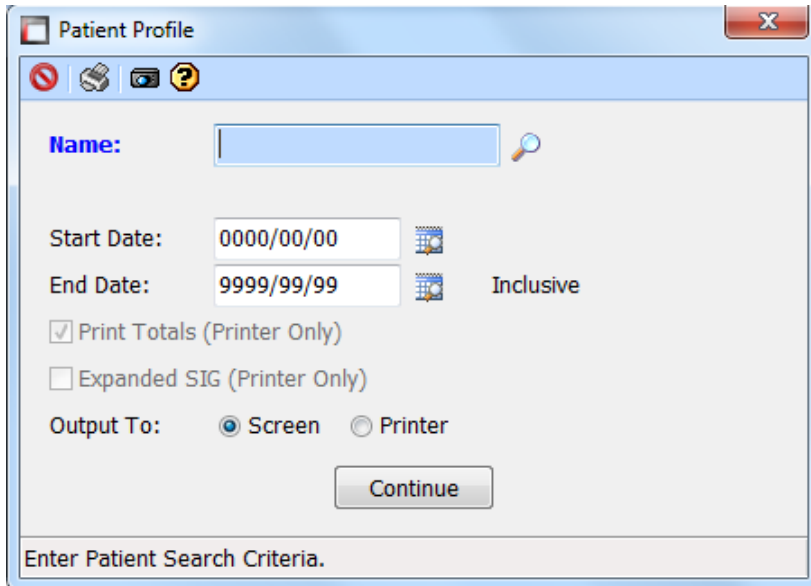
If you wish to continue adding items for the patient, press the ADD NEW ⊞ icon. This will allow you to add more items. If you need to delete an item from a patient, highlight the product and select the Delete (✖ icon. You can also make changes to anything you have put on file buy using the Modify 🔧 icon.

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Patient Profile

In order to open the Patient Profile, click on the Patient Profile [ ] button. It will open the following window:
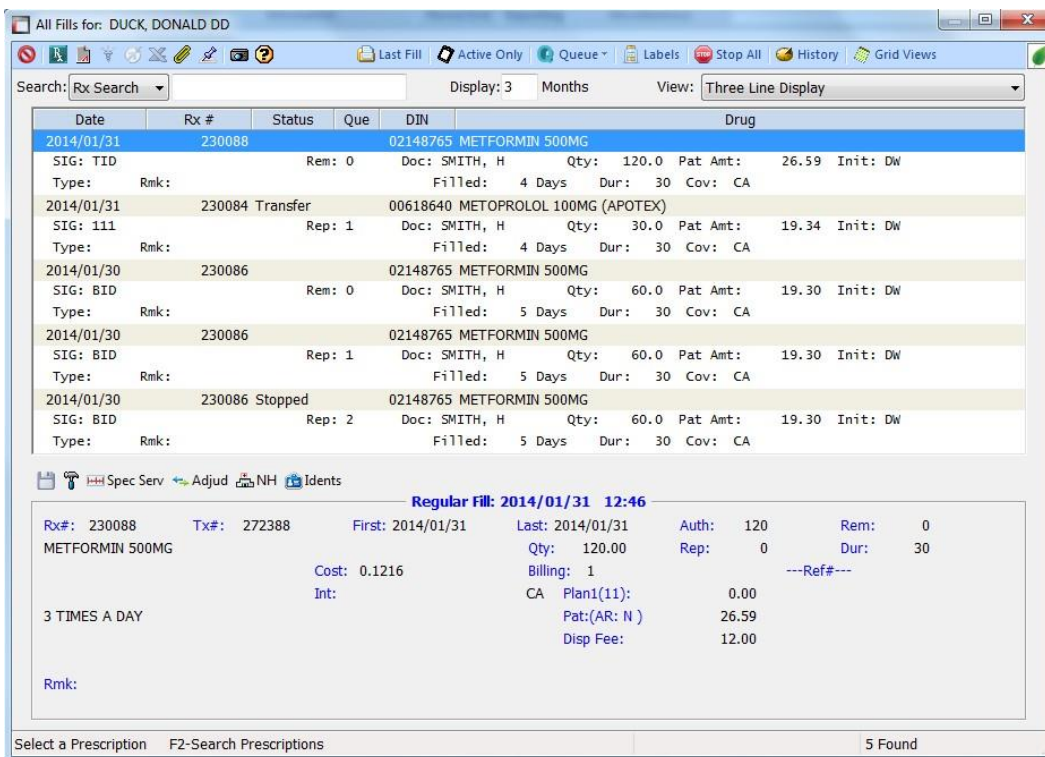
Remember, pressing the ENTER key while in the search field will change the search type.

Search for the patient you wish to view the profile. You have the option to select a date range for the profile.   It you leave it at default, it will give you everything on the profile. The Print Totals and Expanded Sig options are only used if the profile is sent to a printer to be printed. The 'Output To' option is where you decide if you simply want to view the profile or print it directly. Click on the Continue button to display the profile.

Overview

Here is an example of the Patient Profile window:

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Header

Common Buttons (1)	The buttons displayed here are among the common buttons in the application, and their use is described in the 'Overview of the Interface' section of this manual.
Last Fill / All Fills	Selecting this button will only display the last fills on the profile. Selecting the button again will display every fills on the profile.
Active Only	This button will display only active prescriptions on the profile
Queue	You can use this drop down menu to add the highlighted prescription for a specific function, into the filling Queue.
Labels	This button prints a label for the highlighted prescription
Stop All	This button allows you to stop every fill on a prescription
History / Comp. History	Displays the history of the highlighted prescription. Pressing this button a second time will revert back to the complete history of the profile.
Grid Views	This button allows you to change the view of the profile.
Search	This field determines which criteria is used for searching the profile: Drug Name, DIN, or Rx Number
Display	The maximum amount of months the profile will show prescriptions for. This field can go to 99 months maximum.
View	You can change among the different saved views of the profile. Please see the Grid Views section below for more information.

## Prescription Detail Section

The bottom section of the window is displayed when in Rx Detail View mode, which can be turned on and off using the Rx Detail con. It displays relevant information for the currently highlighted prescription.

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💾	This button saves the remarks added in the RMK field.
🔧	This button allows a user to change the RMK field.
Spec Serv	Special Service button. This will open a display and show any special codes you used when claiming this prescription to an insurance
Adjud	The adjudication button displays the past adjudications for the prescription. If any insurances were used, it will be displayed in this window.
NH	Nursing Home. This displays any of the nursing homes that are linked to the prescription. (This feature does not come by default; it must be activated)
Idents	This option is only used by the Support Staff.

Grid Views

Pressing the Grid View button launches the following window:
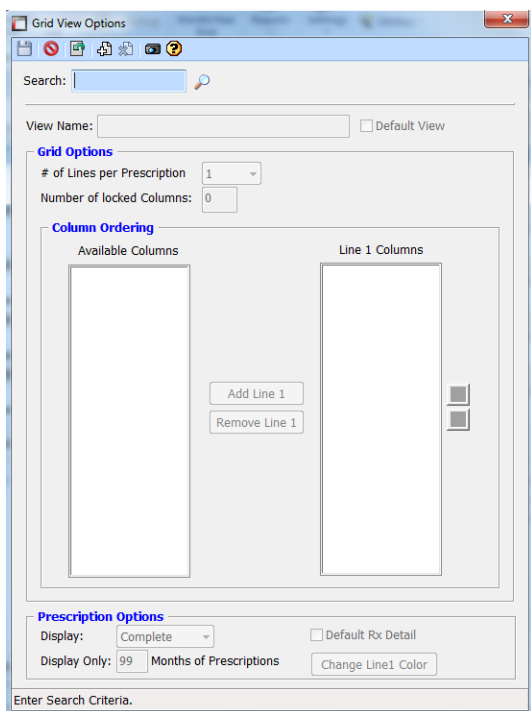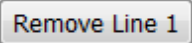
Clicking on the Magnifying Glass 🔍 icon displays the grids that are available for profile viewing.

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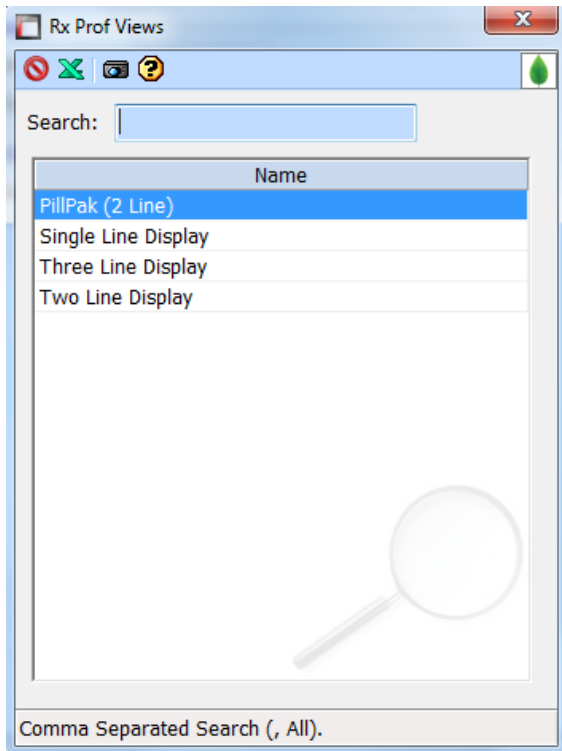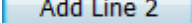
Double click on the display you want to change.
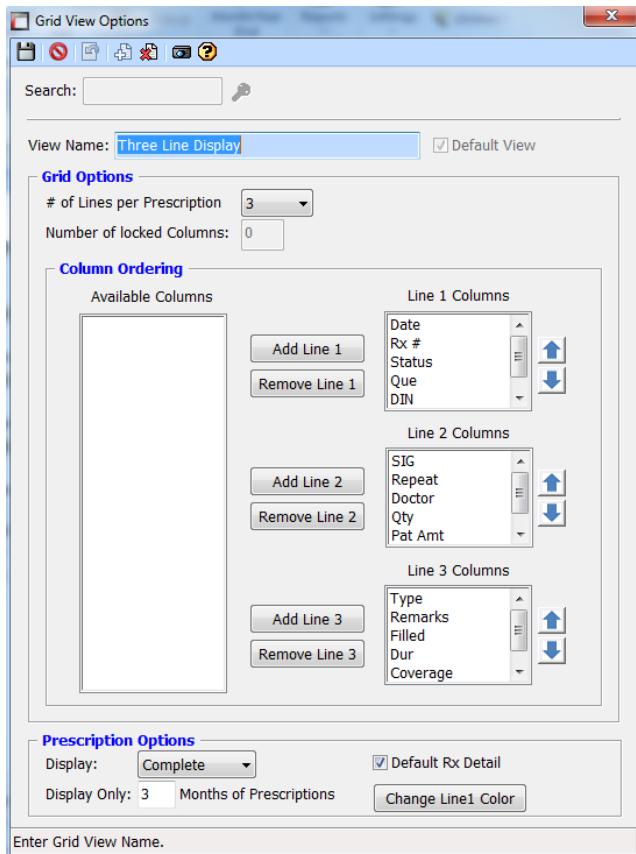
If you want to move things around, highlight the heading under "Line Columns"

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Select the heading you want to move. For example, in Line 1, I selected RX#, then clicked the Remove Line 1 button. This put the heading over in the "Available Columns" removing it from the Profile view.

Then, I selected the heading and clicked one of the Add buttons (In this example, Add Line 2) This put the RX# down into the second Column. You can move as many columns around as you wish.

Remember to SAVE 💾 your work afterward! Before Changes were made: The Rx # column was on the top line
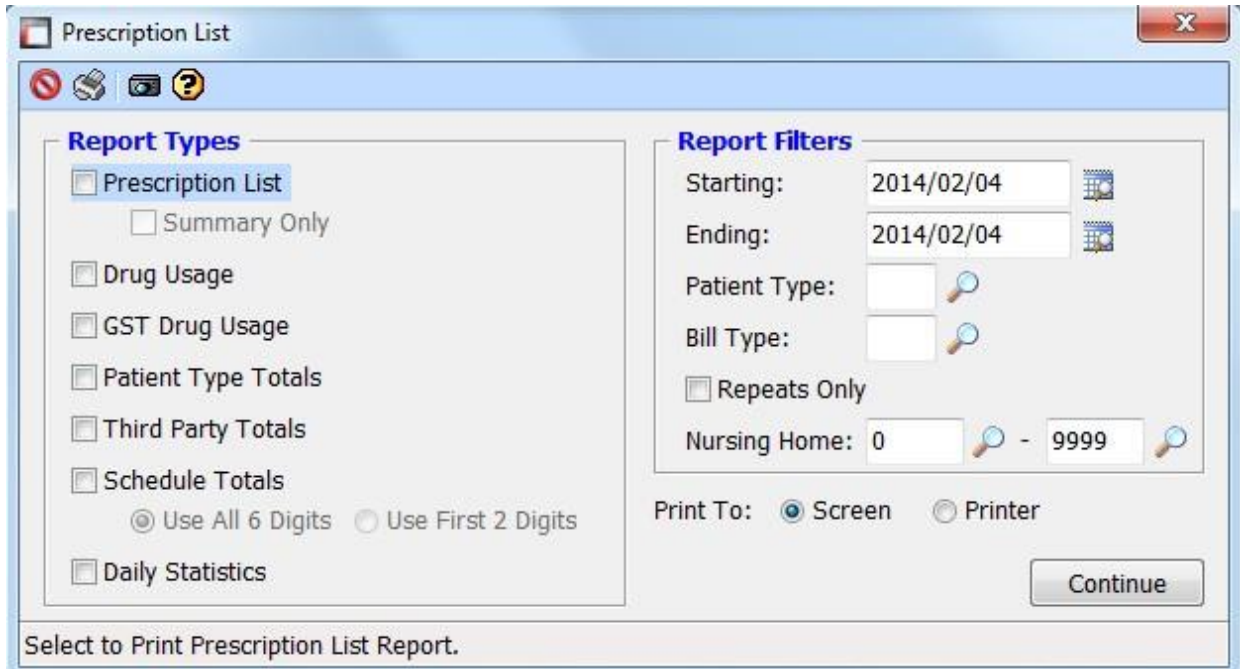
After the RX# was changed, it has been moved to the second line.

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Prescription List

This is a quick way to get a list of prescriptions that were filled for a specific time period, you can access this feature by selecting the Prescription List ▱ button.

This will give you access to the search criteria window. Remember to change you reporting dates.

Below are examples of what each report contains:

Prescription List

Prescription List Summary Only

```
February 4, 2014            Super Thrifty Drugs                PAGE:     1

STATISTICS REPORT      FOR      JANUARY 31, 2014      THRU    FEBRUARY  4, 2014
-------------------------------------------------------------------------------
  RX #    STATUS        RX #    STATUS        RX #    STATUS        RX #    STATUS
-------------------------------------------------------------------------------
 230084  DELETED       230084  DEFERRED      230084  DELETED       230084  TRANSFER
 230087  RX ABORT      230088  NEW           230089  RX ABORT      230090  RX ABORT
 230092  RX ABORT

        NEW              1
        TRANSFERED       1
TOTAL FILLED             2
        DEFERRED         1
        DELETED          2
        RX ABORT         4
TOTAL                    9
```

Search: [   ]   Print

Drug Usage

```
February 4, 2014          Super Thrifty Drugs              PAGE:    1

DRUG USAGE REPORT      FOR      JANUARY 31, 2014      THRU   FEBRUARY  4, 2014
-------------------------------------------------------------------------------
 ORDER #    QTY    D.I.N.   NAME/STRENGTH                    EXT. COST    ONHAND        UPC Code
-------------------------------------------------------------------------------
           120.0  2148765   METFORMIN 500MG(GEN)              14.5920    320.00-            0
 999999     30.0   618640   METOPROLOL 100MG (APOTEX)(APX)     6.6690     30.00-            0

        TOTAL QUANTITY       DRUGS PRINTED            TOTAL COST
           150.0                  2               $       21.26
```

Search: [   ]   Print

Patient Type Totals


```
Screen Print

February 4, 2014                    Super Thrifty Drugs                           PAGE:    1

PATIENT TYPE TOTALS    FOR    JANUARY 31, 2014     THRU   FEBRUARY  4, 2014
------------------------------------------------------------------------------------------------
PATIENT TYPE              NEW      PATIENT        PLAN     REPEAT    PATIENT        PLAN     TOTAL     PATIENT      PLAN
------------------------------------------------------------------------------------------------
CASH CUST                  2       45.93          0.00       0        0.00         0.00       2       45.93        0.00
GRAND TOTAL                2       45.93          0.00       0        0.00         0.00       2       45.93        0.00
```

Search: [   ]   Print

Daily Statistics


```
Screen Print

 FEBRUARY  4, 2014    15:02    Super Thrifty Drugs              Page:  1
DAILY STATISTICS FOR:        JANUARY 31, 2014  TO   FEBRUARY  4, 2014
--------------------------------------------------------------------------
DATE      NEW    REP    TOTAL       SALES        ACQ.       PROFIT    MARGIN
31/01      2      0      2          45.93       21.26       24.67     53.71%
TOTAL      2      0      2          45.93       21.26       24.67     53.71%
--------------------------------------------------------------------------
 THIRD PARTY                 NEW    REP    TOTAL     SALES      ACQ      FEE      MK UP        PROFIT   MARGIN
 11  CASH PATIENTS            2      0      2        45.93     21.26                            24.67   53.71%
      ** NOTE: Total Prescription Counts Will Not Equal Third Party Counts Due To Split Billings.
              Third Party Sales Totals Should Not Be Used For Reconciling As They May Include Some Patient Amounts.
              Use 'Third Party Totals' Report Or 'Adjudication Report' For Reconciliation Purposes.
```

Search: [   ]   Print

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You can also run reports based on Patient type or Bill type. To do this select the Magnifying glass 🔍next to these fields.

This will give you a pop up window for you to select the criteria.
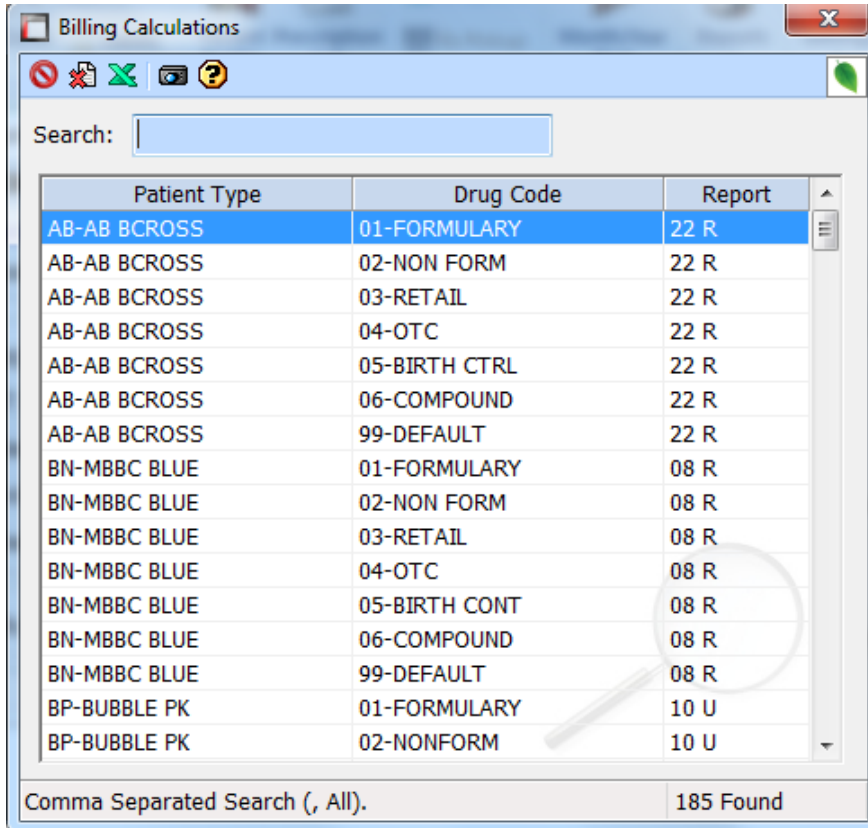
Double click on the plan you wish to run the report on.
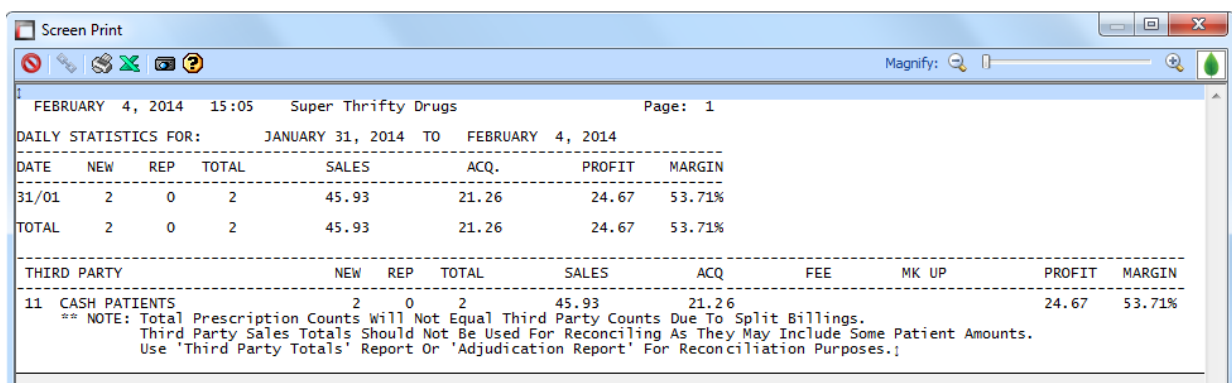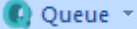
💡 **Did you know?**

Reports can also be run based on nursing homes if you are using this feature. This can include a range of nursing homes or each individual home.

Rx Queue

This is the location where all the prescriptions you have selected to perform functions on are stored until filled, or acted upon.

Selecting the Rx Queue button [Queue] will open the display window.
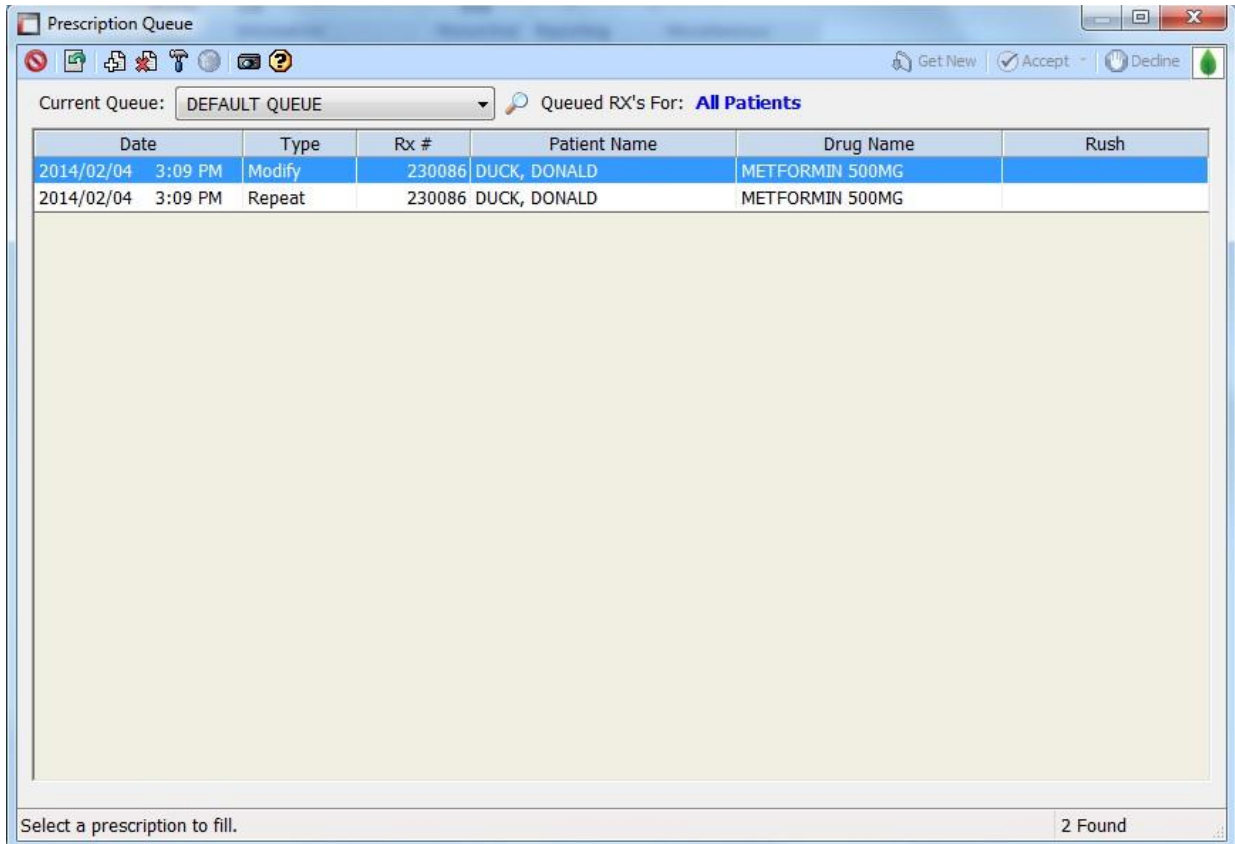
This displays the function that is waiting to be acted upon for each prescription. The above 2 prescriptions are waiting to be Modified and Repeated respectively.
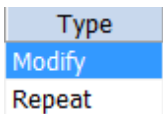
You can add new prescriptions to the Queue from this window by clicking on the ADD NEW icon. This will give you a pop up window. You can enter the Prescription number you want to add to the Queue. Select the 'Type' dropdown menu and select what function you want to perform on the prescription.
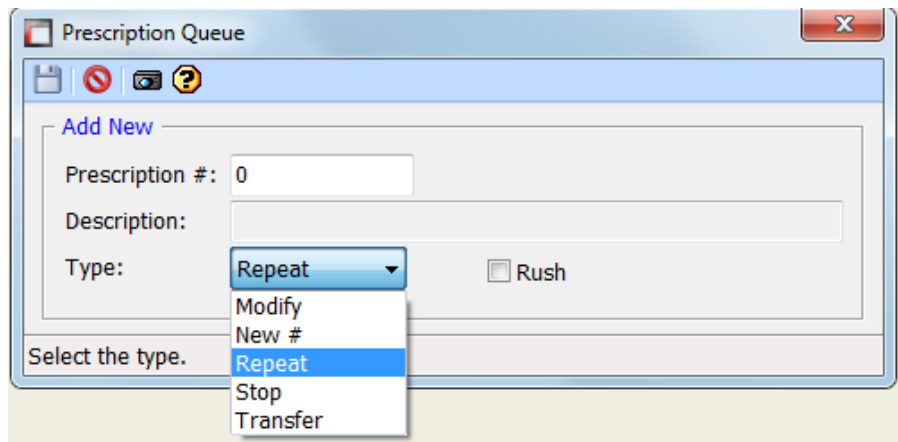
Once done, SAVE your addition. You can also DELETE from the Queue fill. This is down by highlighting the

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prescription and pressing the Delete ![icon] icon.

Also if you added a prescription to the Queue but it was added as a REPEAT, but was supposed to be a MODIFY, you can click the Modify ![icon] icon and change the status.

This will open the window and you can change the prescription type from the drop down.
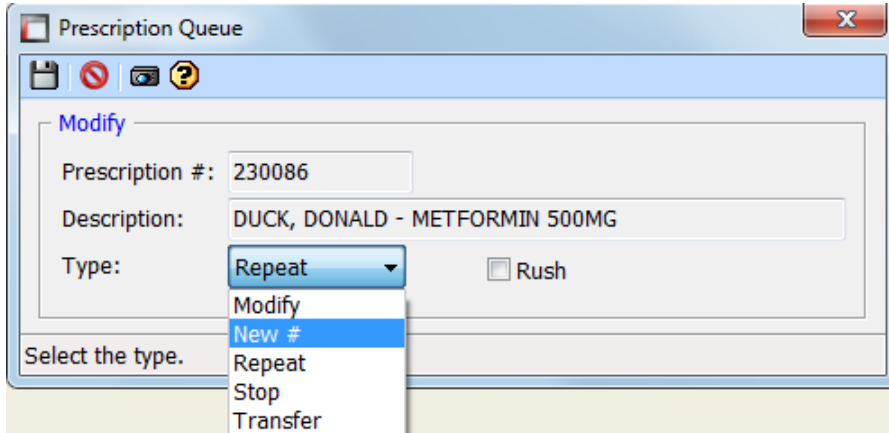
Remember to SAVE ![icon] your work!

Starting the Workflow

To start the workflow in the Queue, open the Prescription Process screen.

Once the window is open, select the Queue button ![Queue] on this screen. This will give you a pop up window.

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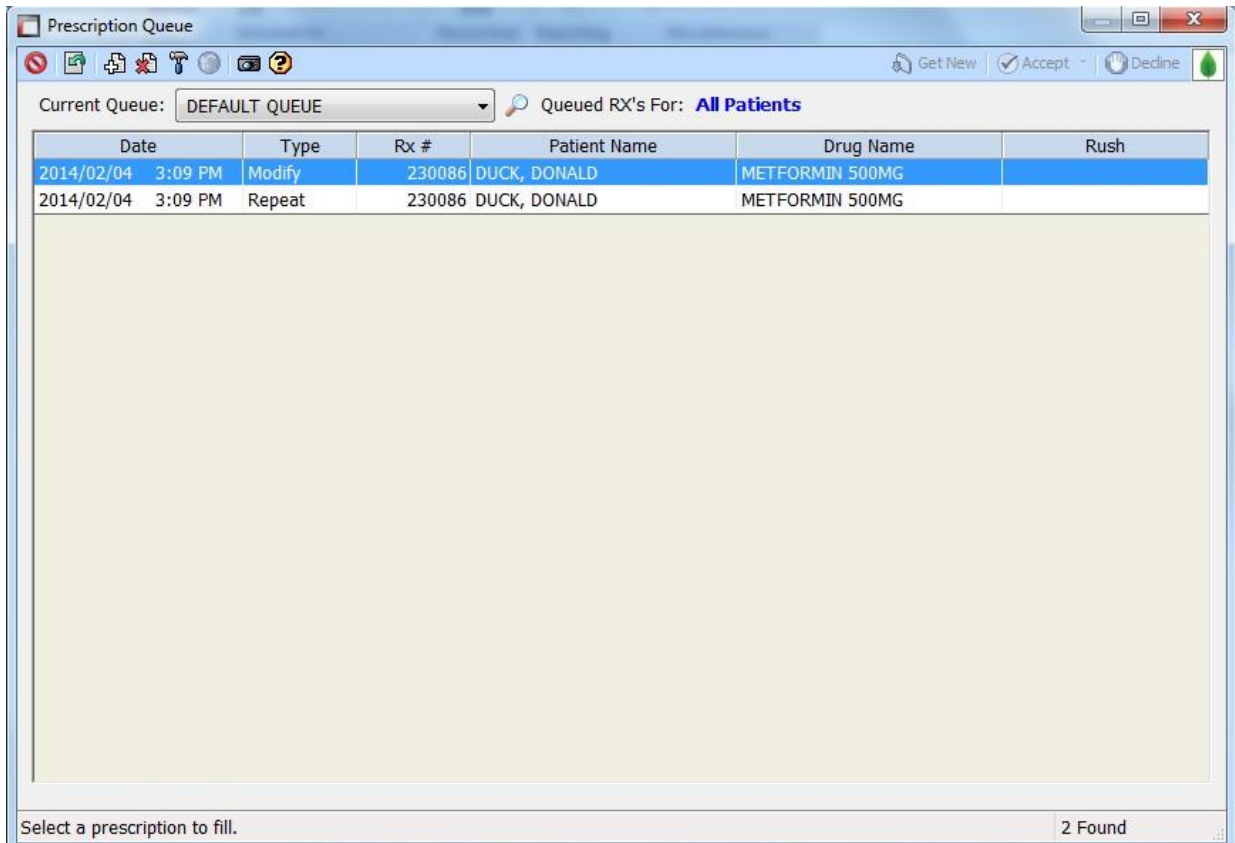
Double click on the prescription you want to start with.

This will begin filling anything that is in Queue. Once you have started, the software will continue with each prescription in the Queue until you are either done and the Queue is empty, or you cancel the workflow.

Entering your initials and pressing the process button, will complete the prescription and move to the next one in Queue. Whenever you are completing an action with in the Prescription filling screen, it will display the information on the left panel of the screen under the information section.

This will be displayed for each patient.

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Mapping System for Deliveries

If you offer a delivery service from your pharmacy, the SHOW MAP feature is a great tool. In order to use this feature, you need to make sure the patients address is complete.

This creates a hyperlink to a mapping system and can be printed and used for the delivery driver to find the correct location for the client.

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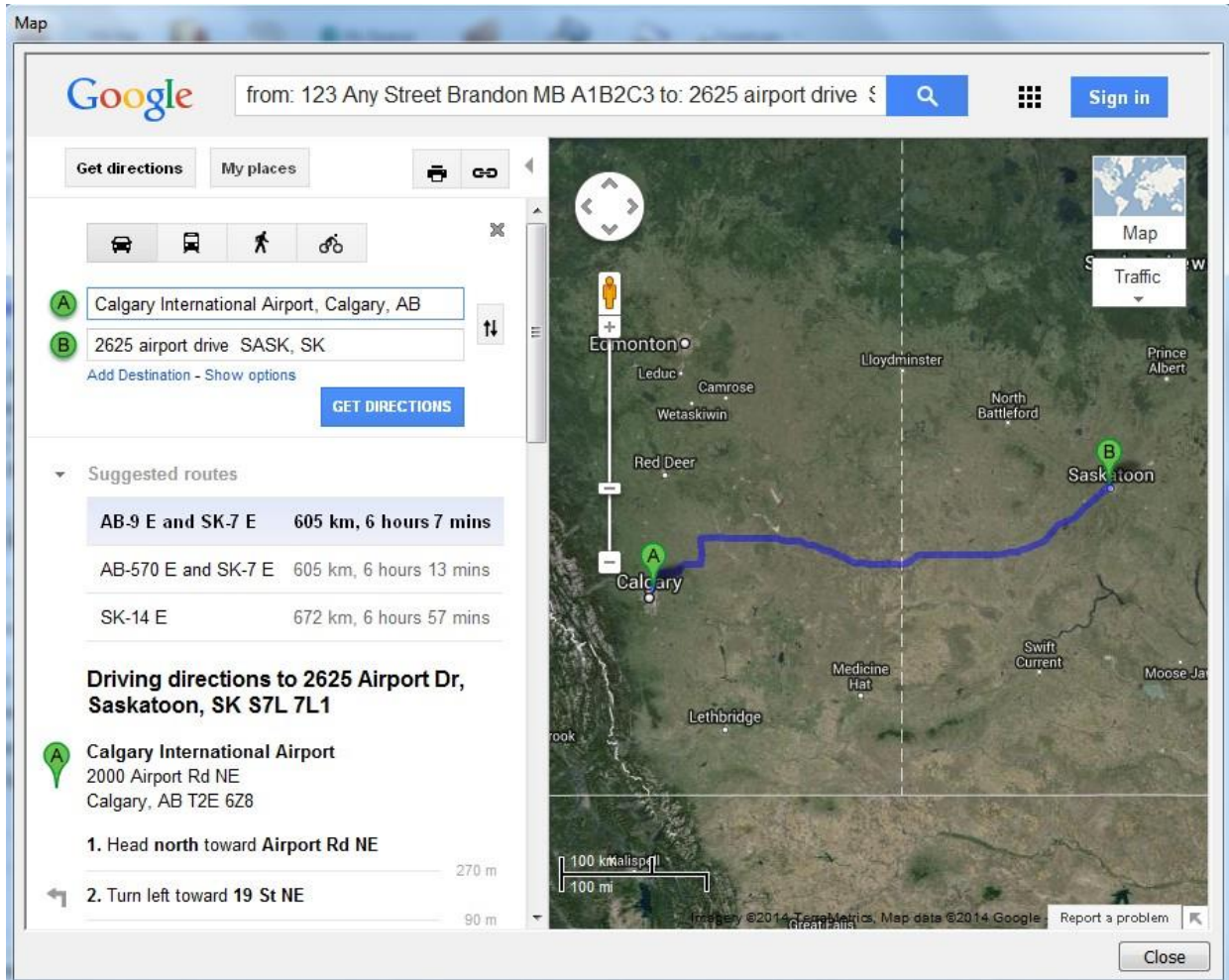
Reminders

You can add reminders to the system and these can be used for tracking of important tasks. This is done by clicking on the Reminders tab located on the same section as the Information.

To add a Reminder, click on the ADD ⊞ icon. This will give you a pop up window.
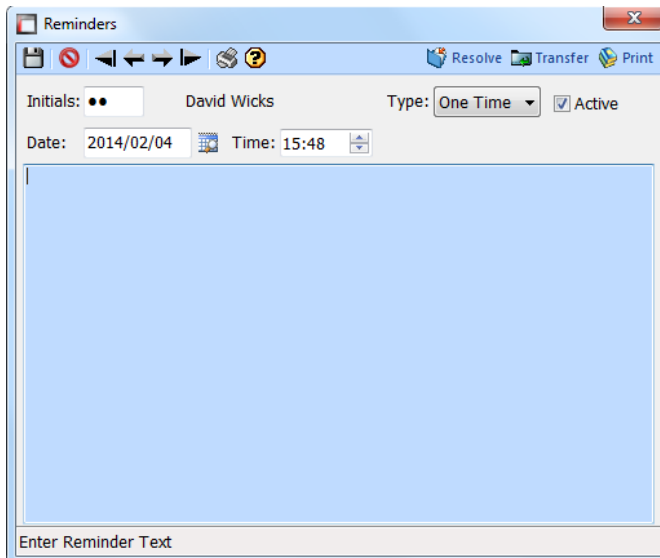
Enter the information you want to be reminded of.
You can set this for a one time only, or use the drop down to change the frequency of the reminder.
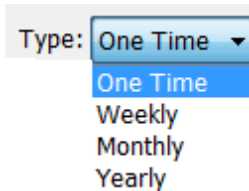
Once you start adding reminders, they will appear in the window. Like so:
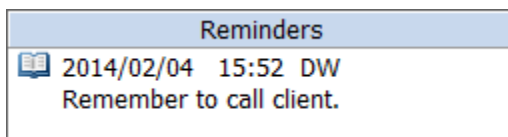
To reopen the reminder, double click the reminder. Once you have taken care of the task, you can click the resolve button 🔷 Resolve while the reminder is open and it will erase it from the field.

You can also print the reminder by pressing the Print button 📖 Print, when the reminder is opened.

If you need to make the reminder for a future date, you can use the Calendar drop down, before creating the reminder and select the date you wish to use.
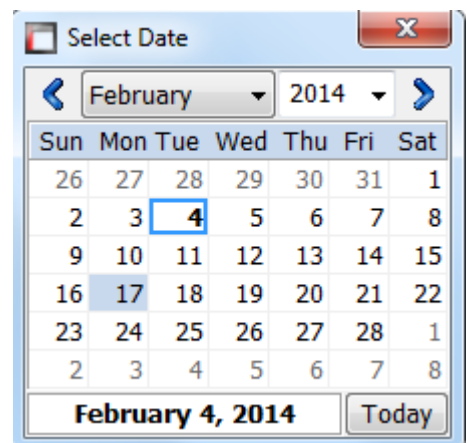
Also, you can, at any point, modify the reminder you have created by selecting the reminder and pressing the MODIFY 🔧 icon. Or, if you want to take it out of the reminders use the DELETE ❌ icon.

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Month/Year End

At the end of each month you will have to run a Month End. This is done throughout the year except for the last month of your fiscal year. On that day, you must run a Year End instead. This is run each month to update any reports you may wish to run. Without a proper Month End, your reports will look different than what you are looking to achieve. To access the Month/Year End select the button.

This will open up the following window:

First, select the Run Type: Month End or Year End. In the above image it shows the last month end was done for the month of October, and showing we are going to perform the month end for November. Also listed are the steps that will happen when you run the report for the selected Run Type. You also have the ability to print the Statistics report to a printer. Pressing the Continue button will complete the process.

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Reports

The system is capable of running a wide variety of reports. To access the report menu press the Reports Button.
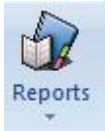
This will give you a dropdown menu. Select the report you wish to run from there.

Following are some examples of different reports that can be run with this system.

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Master File Reports, Patient Master Report

When choosing the Patient Master Report, the system will ask you which parameters you want to run the report with.

If you want to run a report on all the patients in your system, you can enter an "A" in Patient Last Name and leave the Z's in the second column. This will capture all clients in your system.

The bottom of the report also shows you how many clients were included in that specific report.

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Third Party Report

This report can be run to get the total amount of billings done on certain or every Third Party Insurances.

Narcotic And Controlled Drug Report

This report can be run to show any changes done to drugs that fall within this category. This includes reception of drugs, dispenses of drugs, and any changes that were made to the drug inventory. This report can be tailored to all of your narcotics and controlled substances, or just a single, specific, drug.

Settings

This is where the main set up is done to operate the system. This includes Pharmacy set up information and certain system actions. To access these function select the Settings button.
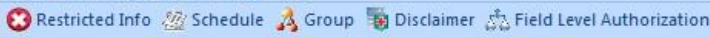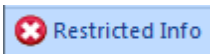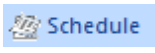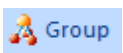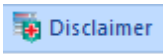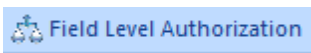
Once it is selected it will give you a dropdown menu with a list of options.

Overview

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Header

Buttons (1)	The buttons displayed here are among the common buttons in the application, and their use is described in the 'Overview of the Interface' section of this manual.
Restricted Info	This is only accessible by support agents. It is password protected.
Schedule	This is used to create a new schedule in the system. More information below.
Group	This is used to create different groups in the system. This can be used to run specific reports on the different groups. Such groups could be "Diabetics" This will allow you to add all your diabetic patient under one group for reports. You can find more information below.
Disclaimer	This is where you set up your Disclaimer to print on any report that requires a disclaimer to be printed. This normally be used for paper billings. More information on Disclaimers can be found below.
Field Level Authorization	This is used in coordination with the setup of team members. This allows you to assign a certain level based on a number in which each user must meet in order to perform the designated function.

Schedules

Clicking on the Schedule [Schedule] button opens a popup window, as such:
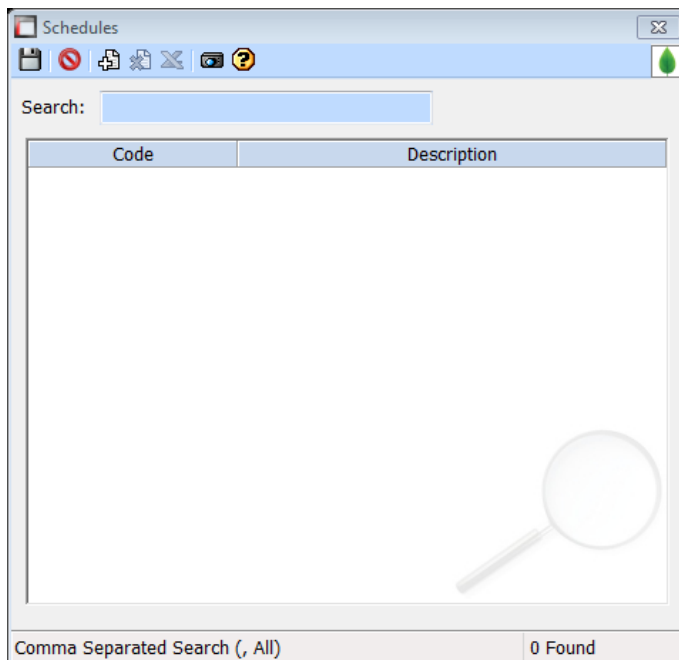
Clicking on the ADD NEW icon will allow you to create the new schedule.
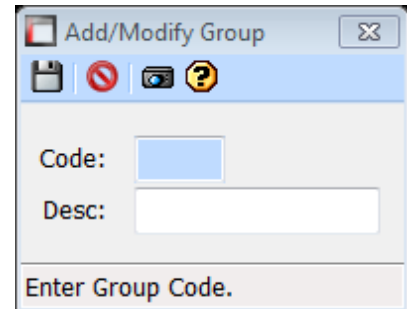
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Once added don't forget to Save 💾 your work.

Groups

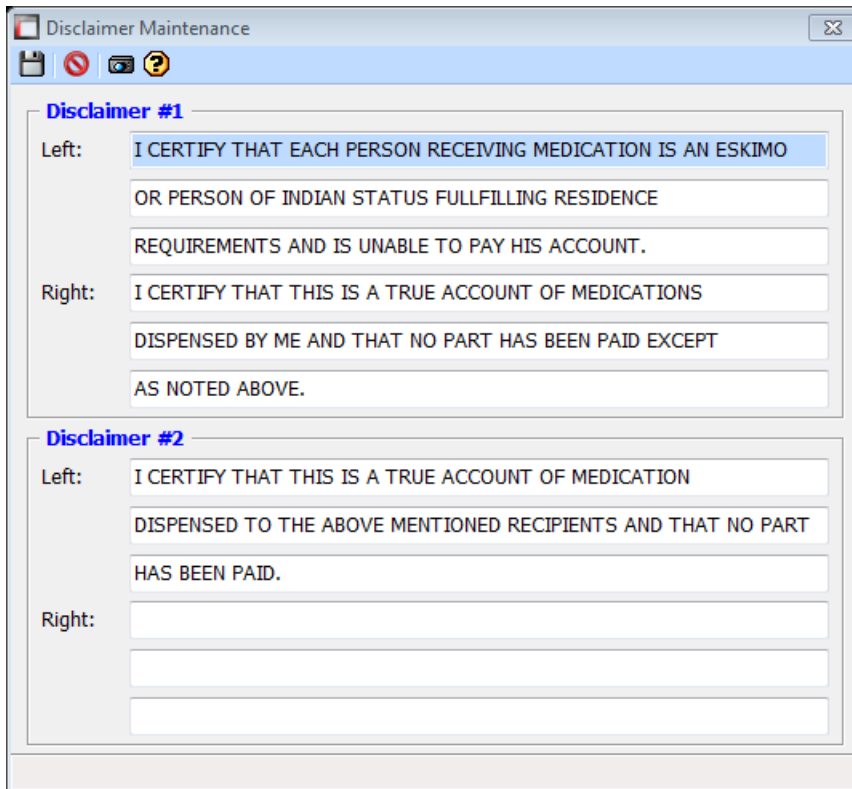Clicking on the Groups button opens the Group Maintenance window:
Click on the ADD NEW 🗗 icon.

Assign a Code for the group and then a description. Don't forget to SAVE
(💾) your work.

Disclaimers

Clicking on the Disclaimers button will open the following window:

You can change this information at any time. Whatever changes you make need to be SAVED 💾.Also be sure the wording you use will reflect the necessary wording for your privacy concerns.

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Field Level Authorization

When clicking on the Field Level Authorization button, the following page appears:

From this window, you can set a certain level for each part of the modules available in Assyst Rx-A.

A user must have at least that level on his profile to have access to that feature.

For example, if the Auth level is set at 90 for D09: Onhand, any user created in the system would need an Authorization level of 90 in order to change the onhand quantities for any drug in the system.

Please refer to the 'Pharmacist Maintenance' window for information on how to set up an authorization level for users.
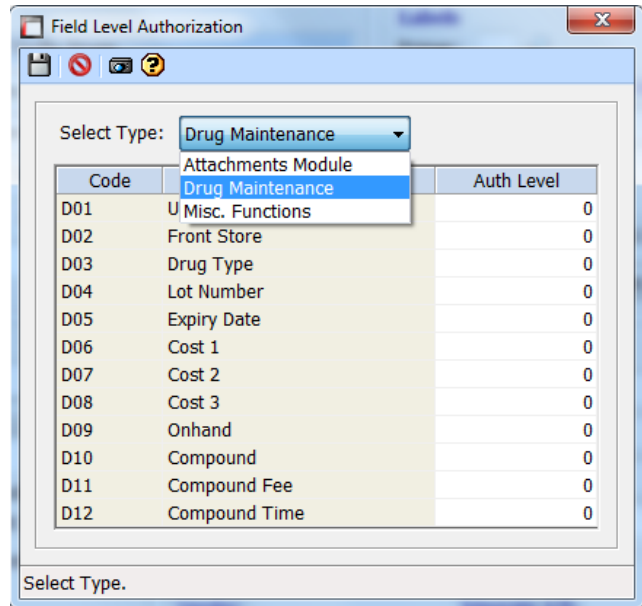
Store Setup

This is where you set the Address for the pharmacy. Some defaults can be set for patients demographics as well; meaning whenever you add a patient to the system, it will default to the City/Province you have set as default. Labels can be set to a default from here and headings for any reports you are running.

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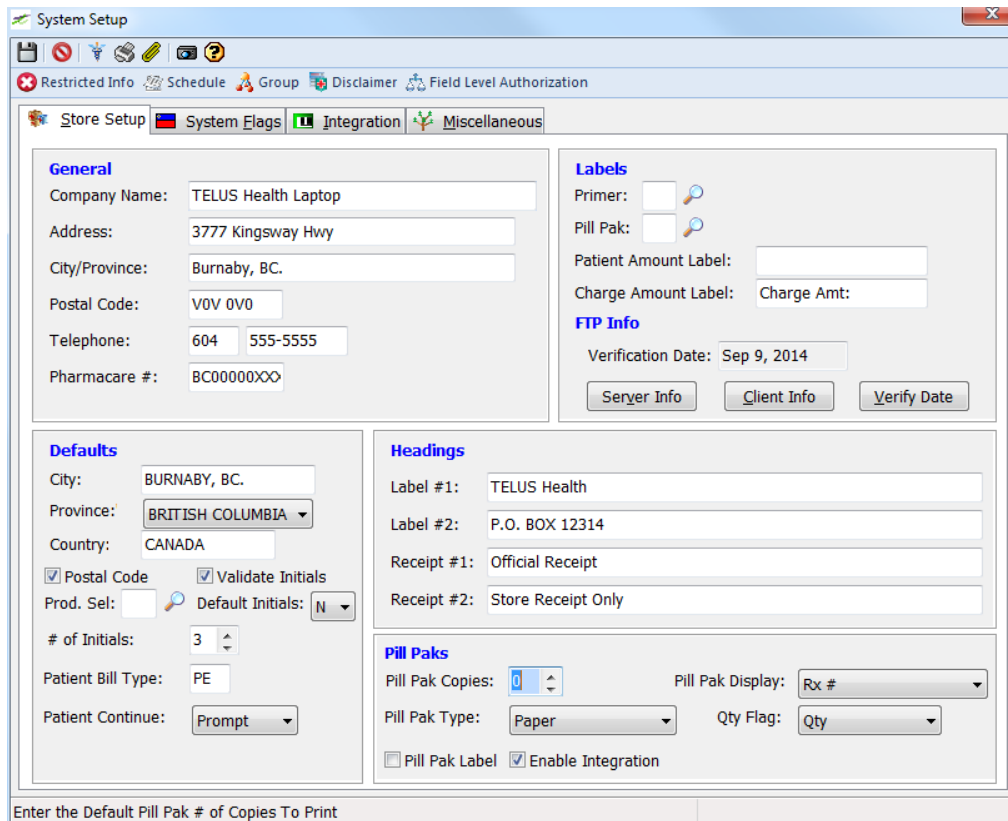
System Flags

Under this heading, you can set defaults of things such as Password expiration for users, taxes on Sundry items, MAR chart options and information you want shared between family members.

Integration

This heading is used with the integration of the Accounts Receivables module. This is where the Accounts are set up for General Ledgers. This works with the Point of Sale systems.

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Miscellaneous

Under this heading you will find a wide assortment of options that can help make the system suit your workflow. You can modify the behavior for Vendor Information, Refills, Warnings, etc.


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┌─ Did you know? ──────────────────────────────┐
│  💡                                            │
│                                                │
│   It would be advisable to contact the Support │
│   Desk to inquire about any changes you may    │
│   want to make, in order to ensure you get the │
│   desired outcome.                             │
└────────────────────────────────────────────────┘
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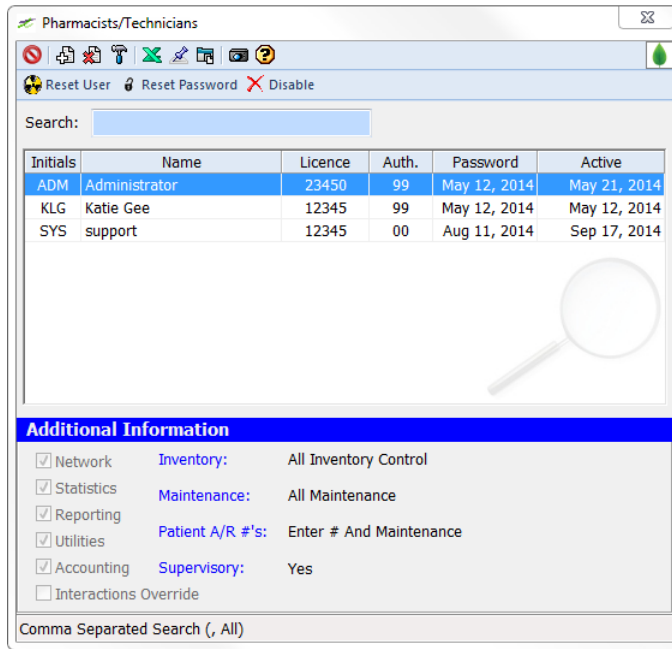
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Pharmacist Maintenance

This section will allow you to add users to the system.

To enter a new user, select the ADD NEW 🗗 icon. Fill in the Initials for the user followed by the user's name, then the license number.

The Authorized level is where you assign a number to the level of access the user has in the system. This number works with Field Level Auth. level described in the 'Overview' section.

You can also select if the user has any control over Inventory, Maintenance, etc. This can be selected from the drop down menu for each section.

Once the user is added, don't forget to SAVE.

You can reset a password at any time by clicking on the RESET PASSWORD button.
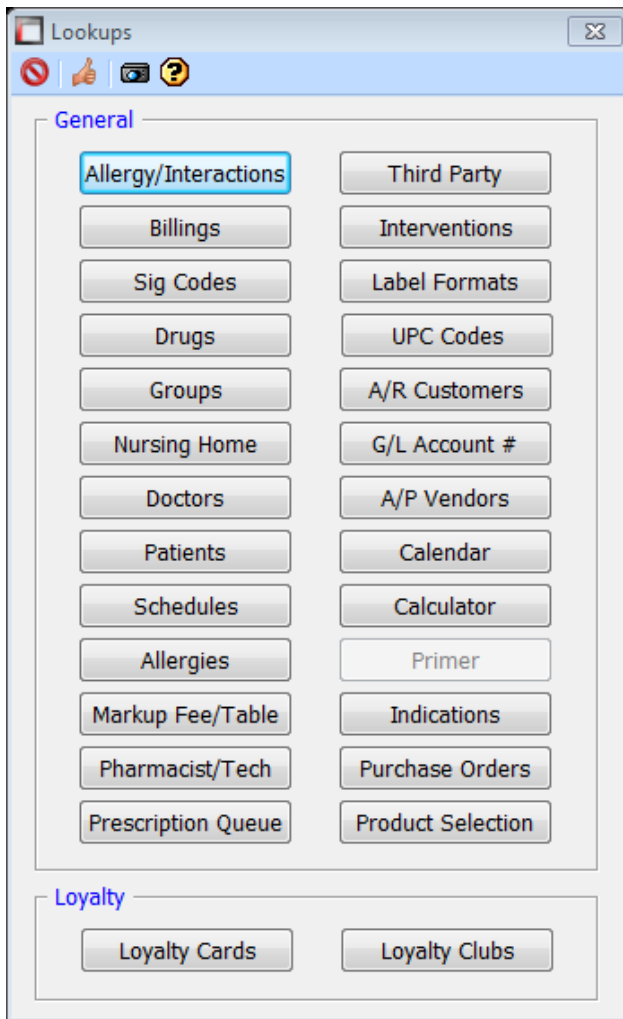
Once you press this button, the selected user will be required to change his or her password on the next sign in. If you need to disable a user from the system, highlight the user and press the DISABLE button.

You can also reset a user by using the RESET USER button).
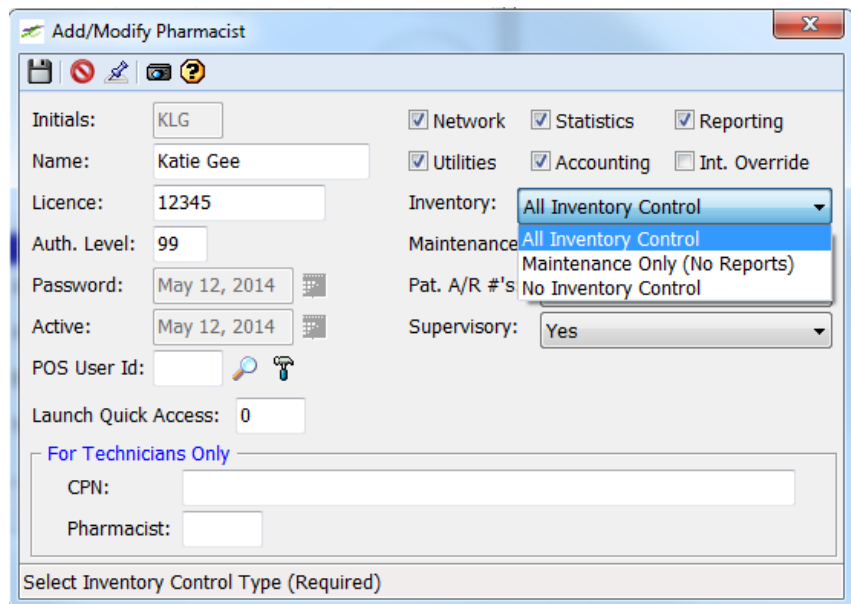
Lookups

Look ups are used as a shortcut feature to locate items in your system. It has a wide variety of items.

Simply select the item you wish to do an inquiry on. These short cuts can be used to access any of the features listed in the menu.

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Utilities

Utilities is a section where you will find functions that you may n o t u s e o n a d a i l y b a s i s . By selecting from the dropdown menu, you will gain access to what is available.
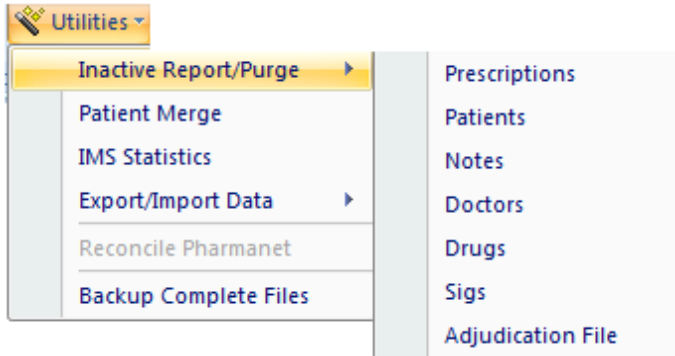

Under the "Inactive Report/Purge" option, you will see options to get rid of old files that are sitting in the system but are no longer being used. By selecting the date and checking the purge file box, the system will get rid of any inactive prescriptions/patients/drugs/etc. up to that date you have specified. You can always print a report first before you attempt any purges, by clicking the Report check box.

Did you know?

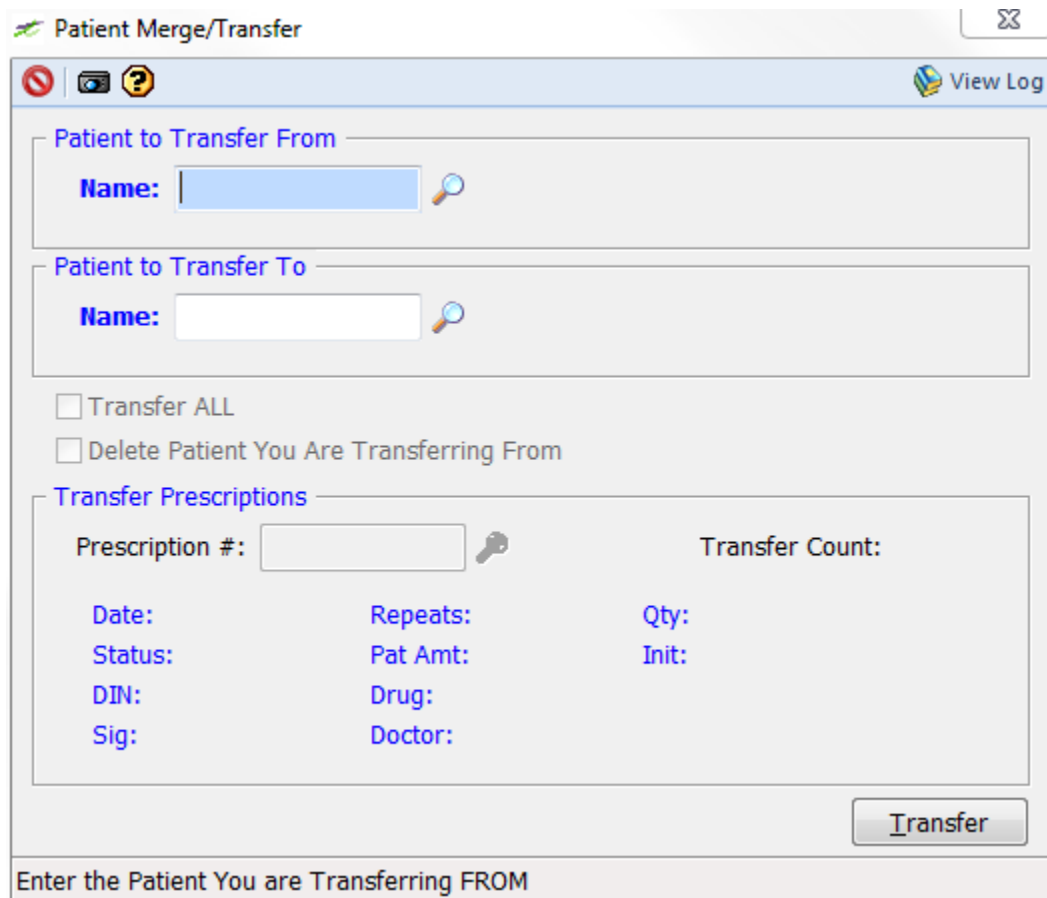Remember that when you purge information, it is no longer available. Make sure to be careful!

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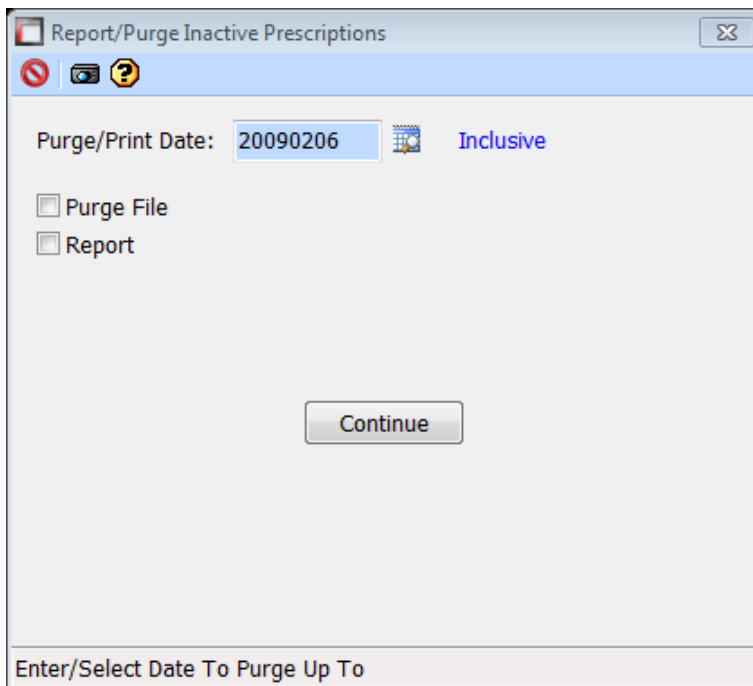
Another function is the "Patient Merge". This is used to merge two patients into one file by moving all the prescriptions from one patient to another. You have the option to Transfer all prescriptions or only individual ones. You can also set the checkbox to delete the old patient once the merge is complete.

💡 **Did you know?**

There is no option to unmerge files. If you merge two patients by mistake, you will have to create a new patient file from scratch and use this option to transfer the prescriptions one at a time back into the correct file. Be careful!