



# CalMHSA<sub>RX</sub>



## County of San Diego Behavioral Health Services



## TABLE OF CONTENTS

TABLE OF CONTENTS.....	2
CONFIDENTIALITY.....	3
DEFINITIONS.....	4
CALMHSA RX ACCESS.....	6
E-PRESCRIBING HOMEPAGE.....	7
PHARMACY MANAGEMENT.....	9
ALLERGY MANAGEMENT.....	11
Adding an Allergy.....	11
Modifying or Deleting an Allergy.....	12
Filters.....	12
DIAGNOSES/PROBLEMS MANAGEMENT.....	13
MEDICATION MANAGEMENT.....	14
Medication History.....	14
Adding a Medication .....	15
Stopping a Medication .....	15
Renewing, Prescribing, Restarting, or Deleting Inactive Medications.....	16
Prescription/Medication Reconciliation.....	17
NEW PRESCRIPTION.....	18
Adding a New Prescription.....	18
Reviewing a Prescription.....	20
Signature Password.....	21
Prescribing Complex Medications.....	22
Tapering Prescriptions .....	22
Splitting Prescriptions .....	23
Creating a Favorite Prescription.....	24
Prescribing a Favorite Prescription.....	24
PRESCRIBING CONTROLLED SUBSTANCES.....	26
Electronic Prescribing of Controlled Substances (EPCS) Onboarding.....	26
Signing a Controlled Substance Prescription.....	26
ALERTS.....	29
Clinical Alerts.....	29
Formulary Alerts.....	30
CLINICAL REPORTS.....	32
Provider Clinical Report.....	32
Patient Clinical Report.....	32

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



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## **CONFIDENTIALITY**

**HIPAA regulations mandate that all client information be treated confidentially.**

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

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

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

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

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

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

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





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## **DEFINITIONS**

- **CalMHSA Rx:** The desktop e-prescribing platform of DrFirst's Rcopia. CalMHSA Rx uses the SureScripts Provider portal in completing the electronic prescription process
- **Enter Details:** The screen where components of the prescription are entered, including the Sig
- **Electronic prescription:** A prescription sent directly to a pharmacy through SureScripts
- **EPCS:** Electronic Prescribing of Controlled Substances
- **Favorite Prescription:** A medication that you routinely prescribe for your clients
- **Fax prescription:** A prescription sent directly to the pharmacy fax machine
- **Formulary:** A list of drugs that provide information on coverage and copays from the client's insurance or health plan
- **Formulary coverage codes:** Codes which determine prescription drug benefit coverage for a particular medication, such as step therapy (ST), or prior authorization (PA)
- **Formulary status:** The coverage status determined by a client's health plan. A drug can have formulary or non-formulary status, or preferred status, such as P1, P2, etc.
- **IDP:** Identity Proofing Process
- **LAC:** Logical Access Control
- **Medication:** A drug that the client is already taking
- **Medical History:** A list of medications that the client has taken in the past; this information may be obtained from the client's health plan or pharmacy
- **OTP:** One Time Passcode



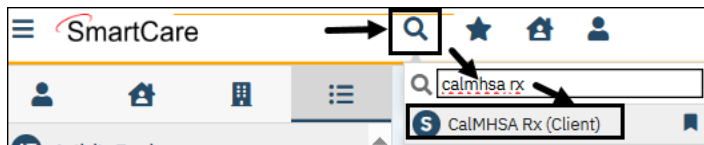


## CALMHSA RX ACCESS

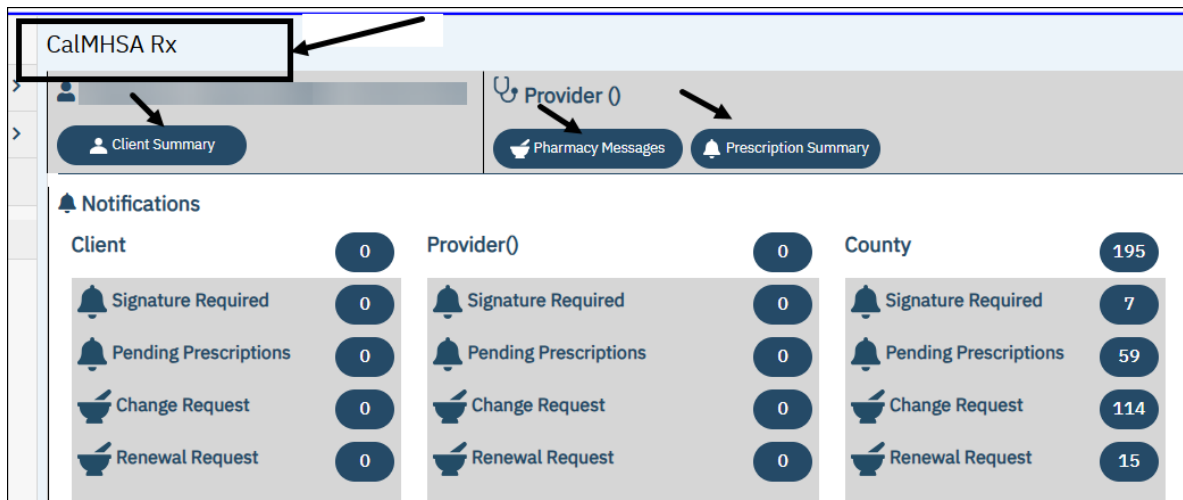
Prescribers and Clinical Support Staff can access CalMHSA Rx by logging into SmartCare and then opening a client by using the **Client Search** button.



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



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



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

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

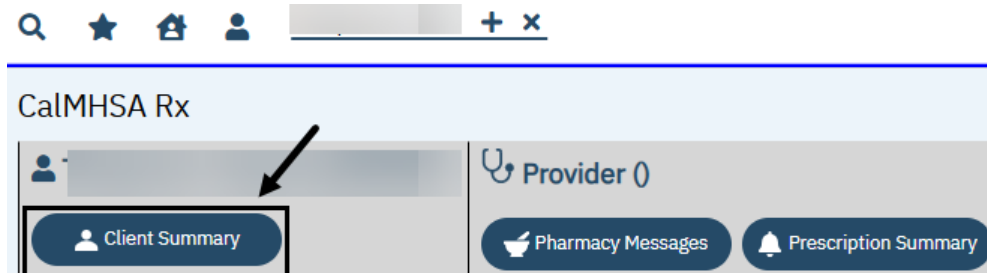
**Pharmacy Messages** allows you to review pharmacy notifications such as prescription renewals/change requests/awaiting/cancellation updates.

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

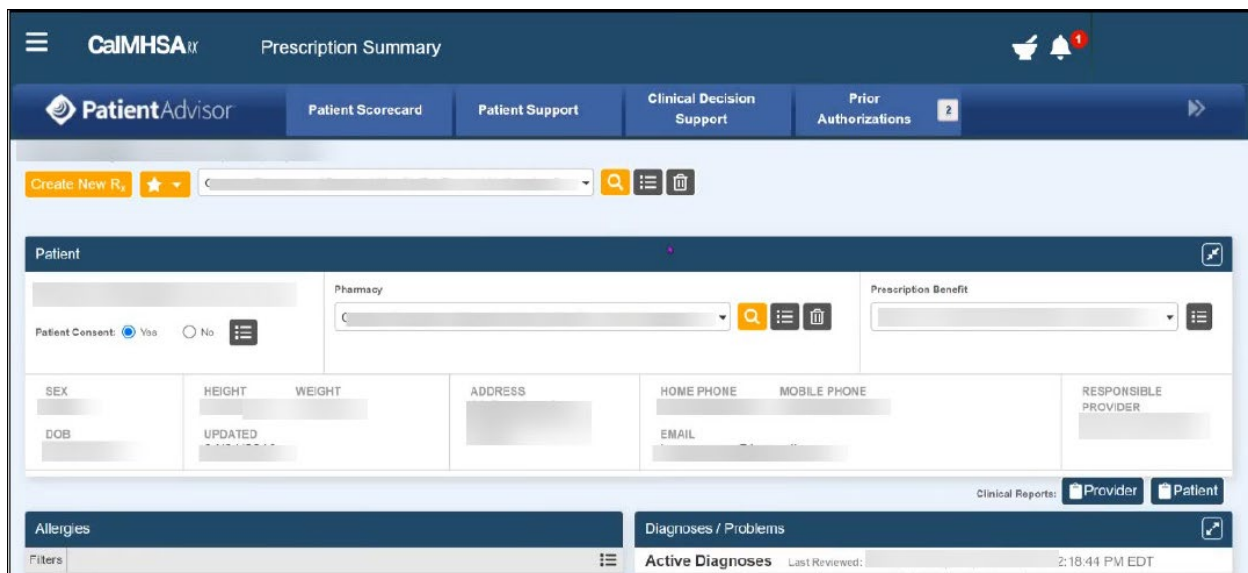


## E-PRESCRIBING HOMEPAGE

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



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



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

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

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



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

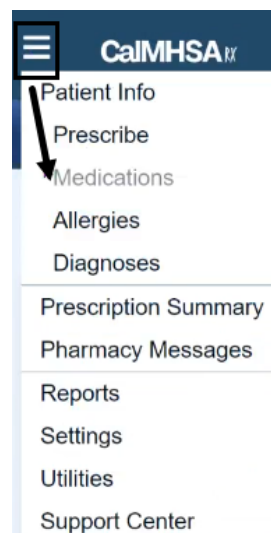
**Medications:** To add a new medication, start, stop, or renew refer to the Medication Management section of this resource packet.

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

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

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

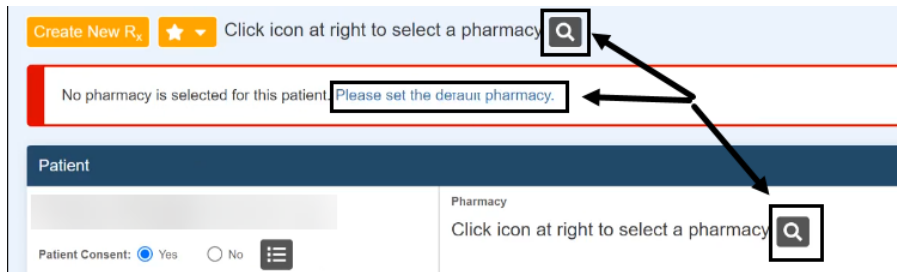
**Menu:** The hamburger menu on the top left of the homepage allows you to toggle quickly between sections.





## PHARMACY MANAGEMENT

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



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

1. Search for the pharmacy. There are three lists: Practice List, Favorites List, All Lists.
  - a. **Practice List:** Pharmacies located within the first three digits of the program’s ZIP Code.
  - b. **Favorites List:** Pharmacies that the prescriber has previously added to favorites list.
  - c. **All Lists:** contains all available pharmacies in CalMHSA Rx.

The 'Select Pharmacy' form includes the following sections:

- List:** Radio buttons for Practice List, Favorites List, and All Lists (selected).
- Pharmacy Type:** Checkboxes for Retail (checked), Mail Order, Specialty, Long Term Care, and In-House Dispensing.
- Pharmacy Options:** Checkboxes for 24 hours and EPCS enabled.
- Form Fields:** Name, Address, City, State (dropdown menu set to Kansas), Zip, Phone, and Fax.
- Buttons:** Search and Cancel.

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

Retail Pharmacies					
Showing 1 - 10 of 27 Retail pharmacies found					
<a href="#">Click now to add pharmacy to the patient pharmacy list.</a>					
Name	Address	Phone & Fax	Type	Actions	
<b>KANSAS CITY, KS</b>					
CVS405584/Onco Drug #5150	955 Minnesota Ave.	Phone: (913) 321-8629 Fax: (913) 321-8706	RE	★	
<b>KANSAS CITY, KS</b>					
CVS405600/Onco Drug #5183	8101 State Ave.	Phone: (913) 299-4218 Fax: (913) 299-1852	RE	☆	
CVS405603/Onco Drug #5187	3750 State Ave.	Phone: (913) 281-8017 Fax: (913) 281-8245	RE	☆	
CVS405608/Onco Drug #5196	4645 Shawnee Drive	Phone: (913) 236-9009 Fax: (913) 236-6230	RE	☆	



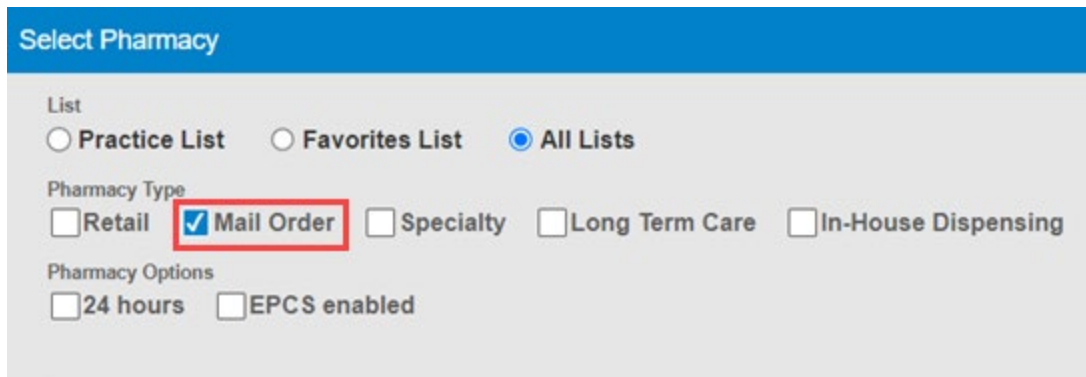
Confirm selection, then click within the row to add the pharmacy to the client’s record. If you hover over the type, the system will display what it is.

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

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



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



## NOTES

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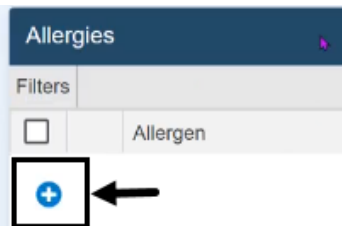


## ALLERGY MANAGEMENT

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

### Adding an Allergy:

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



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

The screenshot shows the 'Allergies' form. At the top is a dark blue header with the word 'Allergies'. Below it is a 'Filters' section. Under 'Filters', there is a search box labeled 'Search for Allergen' and a blue 'Search' button. Below that is a 'Reaction(s)' section with a search box labeled 'Search for Reaction' and a blue 'Add Reaction' button. To the right of the 'Search for Reaction' box is the text 'Selected Reaction(s)'. Below that is a 'Severity' section with a search box labeled 'Search for Severity' and a blue 'Add Severity' button. Below that is an 'Onset Date' section with a date input field. At the bottom left, a yellow 'Save' button and a blue 'Cancel' button are visible. The 'Save' button is highlighted with a black box.

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

**Reaction(s):** Select the reaction

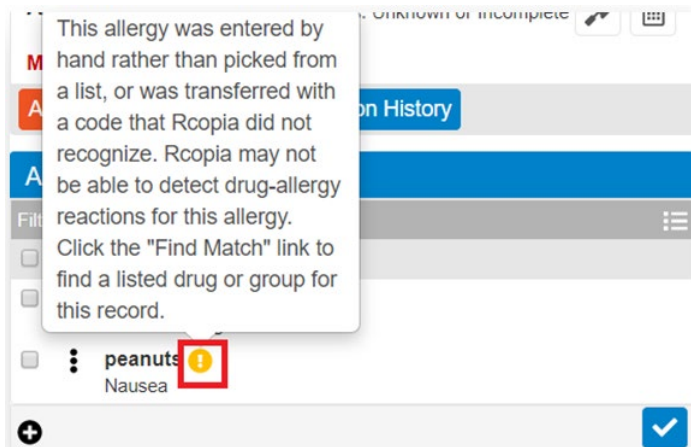
**Severity:** Select the severity

**Onset Date:** Enter the onset date

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



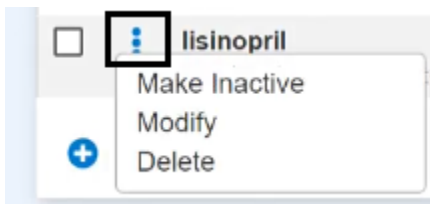
**Note:** A yellow exclamation mark icon next to an allergy indicates that CalMHSA Rx does not conduct a drug-allergy check because the allergy was entered as free text.



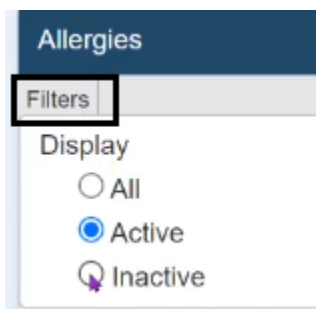
Repeat the previous steps for each allergy. Once all allergies are entered, mark the allergies as reviewed by clicking the check box.



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



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





## **DIAGNOSES/PROBLEMS MANAGEMENT**

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

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



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

### **NOTES**

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## MEDICATION MANAGEMENT

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

Prescriber	Name	Directions	Qty	Rfl	Start	Stop	Last Written	History Source	Actions
	acetaminophen 500 mg capsule	Take 1 capsule by mouth twice a day for 60 days 2 hours before meals OFFICE COMMENTS: Testing 123	120 capsule	none	08/19/2024		08/19/2024		[Refresh] [Print] [Close] [Delete]
	Adderall 10 mg tablet <i>C - II</i>	Take 1 tablet by mouth once a day for 30 days	30 tablet	none	08/05/2024		08/05/2024		[Refresh] [Print] [Close] [Delete]
	Dantrium 25 mg capsule	Take 1 capsule by mouth once a day as needed for pain for 6 days test test please take with food OFFICE COMMENTS: hello audit office notes	6 capsule	1	08/19/2024			Family	[Refresh] [Print] [Close] [Delete]
	doxycycline hyclate 100 mg capsule	Take 1 capsule by mouth every 12 hours	20 capsule	none			05/03/2024	Pharmacy	[Refresh] [Print] [Close] [Delete]

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

**Medication History from Other Sources**

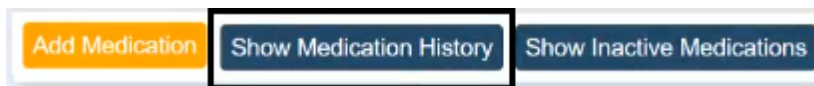
**Note:** Certain information may not be available or accurate in this report, including items that the patient asked not be disclosed due to patient privacy concerns, over-the-counter medications, low cost prescriptions, prescriptions paid for by the patient or non-participating sources, or errors in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

Select time period... 08/22/2024 to 08/22/2024

- 3 months
- 1 month
- 3 months
- 6 months
- 1 year

[Add to Active Medications]

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



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

**Medication History from Other Sources**

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

1 year

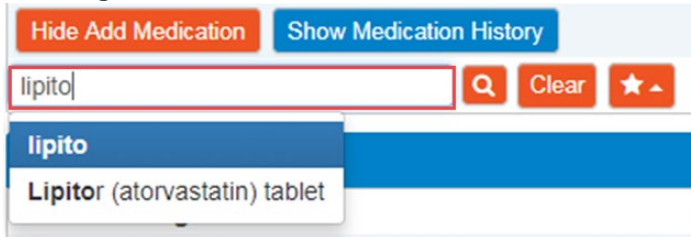


## Adding a Medication:

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



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



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

**Add Medication**

lisinopril 10 mg tablet 10 mg tablet \*

PATIENT DIRECTIONS

-- Action -- -- Dose -- -- Unit -- -- Route -- -- Frequency -- -- Other --

Additional Directions To Patient

Days Supply: days Quantity: -- Unit -- Refills: 0 Substitution permitted

Primary Diagnosis: -- Select --

Additional Notes To Pharmacist

Start Date: mm/dd/yyyy Stop Date: mm/dd/yyyy Last Written Date: mm/dd/yyyy

**Add** **Close**

## Stopping a Medication:

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

Name	Directions	Qty	RI	Start	Stop	Last Written	Actions
Adderall XR 20 mg capsule, extended release C - II	Take 2 capsule by mouth once a day.	30 capsule	none	09/01/2023	10/04/2023		[Stop] [Refresh] [Print]
amoxicillin 500 mg tablet	Take 2 tablet by mouth twice a day.	30 tablet	none	10/04/2023	10/04/2023		[Stop] [Refresh] [Print]
Celebrex 200 mg capsule	Take 1 capsule by mouth three times a day.	30 capsule	none	09/18/2023	10/04/2023		[Stop] [Refresh] [Print]
ibuprofen 200 mg capsule	Take 1 capsule by mouth once a day.	30 capsule	none	09/20/2023	10/03/2023		[Stop] [Refresh] [Print]
Lexapro 10 mg tablet	Take 1 tablet by mouth three times a day.	30 tablet	none	10/03/2023	10/03/2023		[Stop] [Refresh] [Print]
Lipitor 20 mg tablet	Take 1 tablet by mouth twice a day.	30 tablet	none	09/18/2023	09/26/2023		[Stop] [Refresh] [Print]
Xanax 1 mg tablet C - IV	Take 1 tablet by mouth once a day.	30 tablet	none	09/26/2023	10/04/2023		[Stop] [Refresh] [Print]



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

### Stop Medication

**Stopping**  
Lipitor 20 mg tablet - started on 09/18/2023

**Date Stopped \***

**Common Reasons**

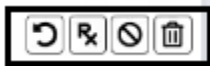
**Notes**

Also Cancel The Last Prescription Written For This Medication

**Last Prescribed**  
SB- [redacted] - completed 09/26/2023 for Lipitor 20 mg tablet  
**Dispense:** \*\* 30 \*\* tablet  
**Refills:** \*\* 0 \*\*  
**Prescribed by:** [redacted], MD  
**Directed to:** Shollenberger Pharmacy - [redacted]

### Renewing, Prescribing, Restarting, or Deleting Inactive Medications:

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



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

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

### Medications

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

Select All

Name	Directions
<input type="checkbox"/> ibuprofen 200 mg tablet	Take 2 tablet By Mouth four times a day.
<input type="checkbox"/> lisinopril 20 mg tablet	Take 1 tablet by mouth every day.

Select All



**Prescription/Medication Reconciliation:**

When prescribing in CalMHSA Rx, a prescription will be added to the Medications list of the client profile as a prescription is sent to the pharmacy.

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

**Prescription/Medication Reconciliation**

**Note**

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

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

Please select an action and click continue

Patient Demo	
Existing Medication	New Medication
<input type="radio"/> Keep WelChol 3.75 gram oral powder packet Take 1 ml by mouth as needed.	<input checked="" type="radio"/> Add WelChol 3.75 gram oral powder packet Take 2 ml by mouth as needed.
<input checked="" type="radio"/> Stop Quantity: 1 ml	<input type="radio"/> Ignore Quantity: 15 ml

Continue

**NOTES**

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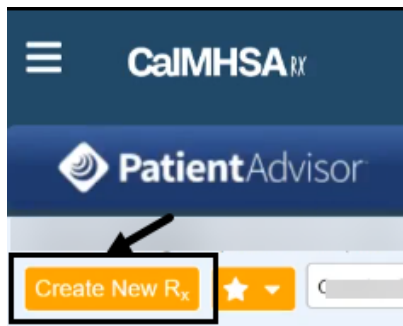


## NEW PRESCRIPTION

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

### Adding a New Prescription:

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



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

Select Medication for Prescription

Prescription Benefit  
PRO-NY-12 (PROINFORMA PBM) , retail & mail

zoloft

Showing 1 - 2 of 2 results for "zoloft" - Select a medication to prescribe

Strength / Pkg	Brand	Generic
Zoloft concentrate	(sertraline)	
Zoloft tablet	(sertraline)	
Oral		
25 mg	NF	NF
50 mg	P1	NF
100 mg	P1	NF

Enter free text "zoloft" as medication

Eligibility provided by PROINFORMA PBM

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

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



the drug strength.

4. Select the appropriate values from the drop-down menus for the **Sig** details. You can also type in free text into the fields to autofill the sig details faster.
5. Select the **Dose Calculator** icon, if desired. A pop-up calculator will appear on screen.
6. Type in **Days Supply**, from 1 to 365 days, if desired. If a duration is chosen, the medication will be automatically removed from the client's Active Medications list once the duration has passed.
7. Choose a numerical **Quantity** and number of prescription **Refills**. Refills are defaulted to 0.
8. Enter a **Primary Dx** (Diagnosis) and/or **Secondary Dx**, if desired. These fields will only appear if the client has Problem(s) listed in their Problem History. The **Secondary Dx** drop-down menu will only appear once the **Primary Dx** is populated.
9. Enter **Directions to Pharmacist**, if desired. Directions are defaulted to 'Substitution permitted.'
10. Enter **Additional Directions to Patient**, if desired. If you exceed 140 characters, the prescription will be automatically sent by fax and will not be transmitted electronically.
11. Enter **Comments** (for office use only), if desired.
12. Click **Review**.

Prescribe Medication

**Patient Observation**  
Weight entry recommended for patients 18 or under

Height:  (In) Date: Never  (Cm) Weight:  (Lb) Date: Never  (Kg)

Zoloft 50 mg tablet  P1

**PATIENT DIRECTIONS**

-- Action --  -- Dose --  -- Unit --  -- Route --  -- Frequency --   PRN -- Other --  for  days -- Add --

Additional Directions To Patient

Pharmacy

Days Supply  days Quantity  -- Unit --  Refills  Substitution permitted  Do Not Fill Before

Primary Diagnosis

Additional Notes To Pharmacist

Provider

Office Use Only



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

- Sertraline (Zoloft 50 mg tablet) has a **SEVERE PRECAUTION** for patients 6 years through 18 years [\[Additional Details\]](#)

Hide this Alert for this Medication & Patient For One (1) Year 1

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**Dose Range** 1 0

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

Provide a justification for this medication.

Select or enter your own below

This prescription tool is in no way intended to replace or substitute for professional judgement.

Acknowledge Alerts
Close

### Reviewing a Prescription:

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

Review Prescription

Patient Allergies: NSAIDs (Non-Steroidal Anti-Inflammatory Drug) (Life threatening severity: Shivering, Heart failure, Hives), Sulfa (Sulfonamide Antibiotics) (low: Cold sweat), bee pollen (high: Rash), [partial list]

**Zoloft 50 mg tablet** 2 ✓

**Directions** Take \*\*2\*\* (two) tablet by mouth once a day for 60 days, then take \*\*1\*\* (one) tablet by mouth once a day for 30 days Take 2 hours before

**Quantity** \*\*150\*\* (one hundred fifty) tablet

**Refills** \*\*none\*\*  
Substitution Permitted

**Days Supply** 90 days

**Dir. To Pharm.** Testing 123

**Order #** [Redacted]

**Request Prescription Fill Status For**  
Partially Dispensed And Not Dispensed

**Provider**  
[Redacted]  
Calmhsa  
9420 Key West Ave, Rockville, KS 20850

Phone: ( [Redacted] ) [Redacted] NPI: [Redacted]  
Fax: (30 [Redacted]) [Redacted] DEA: [Redacted]  
KS Lic #: [Redacted]

**Pharmacy**  
[Redacted]  
0023 NARIAN RD  
Agoura Hills, CA  
Phone: (818) 991 [Redacted]  
Fax: (818) 707-1[Redacted]  
NCPDPIID: 56206[Redacted]

**Hippo Coupon Program**  
Your prescription coupon should appear momentarily. If not, [Click Here](#) to download the prescription coupon.

**Print Coupon**

**SELF-PAY DISCOUNTED PRICE**

Currently Selected  
**CVS#09751/Sav-On Drugs \$457.45** Print

**#9751**

Patient can choose to pay above prices instead of paying with insurance.

Internal Use Only:  Stop Medication On: 11/20/2024 🗑️

Save Pending Rx
Save and Add Rx
Back
Cancel

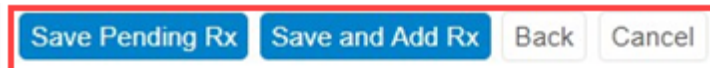
Send
Send & Print
Print don't Send
Sign don't Send
1

Eligibility provided by PROINFORMA PBM



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

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



### Prescriber:

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



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



### Signature Password:

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

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



## Prescribing Complex Medications:

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

## Tapering Prescriptions:

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

Take  tablet by mouth once a day  PRN with meals for 3 days  **and**  
 or  
 then

Additional Directions To Patient

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

PATIENT DIRECTIONS \*

Take  tablet by mouth every morning  PRN with meals for 3 days then

Take  tablet by mouth every morning  PRN with meals for 3 days then

Take  tablet by mouth every morning  PRN with meals for 3 days then

Take  tablet by mouth every morning  PRN with meals for 3 days then

Take  tablet by mouth every morning  PRN with meals for 3 days

Additional Directions To Patient

Pharmacy  
 Able Care Pharmacy & Medical Supplies (C) (R) (E) - 15 Palomba...

Days Supply: 15 days  
 Quantity: 21 tablet  
 Refills: 0  
 Substitution permitted  
 Do Not Fill Before: mm/dd/yyyy

Additional Notes To Pharmacist

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



## Splitting Prescriptions:

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

The screenshot shows the 'Prescribe Medication' interface. At the top is a blue header 'Prescribe Medication'. Below it is a 'Patient Demo' section with fields for Patient Observation, Height (in. and cm), Last verified, Weight (lbs and kg), and Last verified. The medication is set to 'fluvoxamine 25 mg tablet' with a dropdown for '25 mg tablet'. There are dropdowns for 'Provider' and 'Pharmacy'. A red box highlights a '+ Split' button located to the right of the pharmacy dropdown.

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

This screenshot shows the 'Prescribe Medication' form with the split prescription options. It includes the same patient demo and medication information as the previous screenshot. Below the provider dropdown, there are two pharmacy dropdowns: 'Pharmacy 1' (Corner Market & Pharmacy- Silver Sp (C) (R) (E) - 8309 Grubb Rd, ) and 'Pharmacy 2' (Careplus CVS/Pharmacy (C) (MO) (SP) (E) - 152 ). A red box highlights the 'Pharmacy 2' dropdown. A '+ Split' button is located to the right of the 'Pharmacy 2' dropdown.

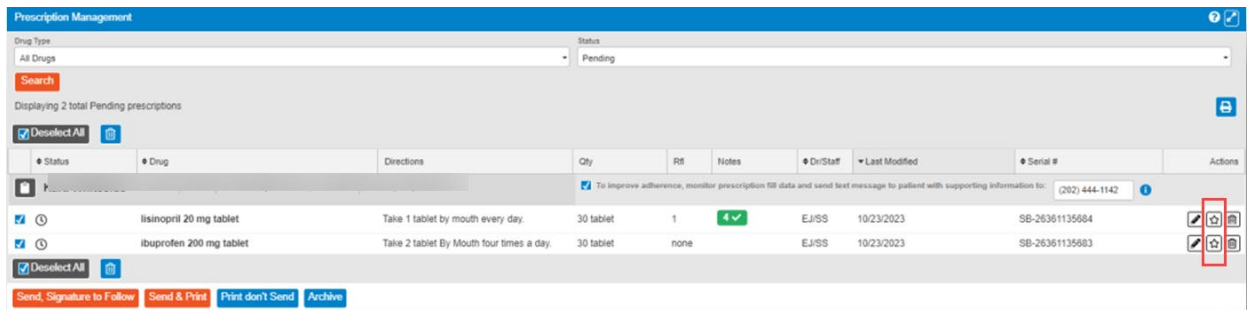
To send two prescriptions, you must select **Quantity** for both Pharmacy #1 and Pharmacy #2. You may also set a specific **Duration** and number of **Refills**. You will be able to select a **Do Not Fill Before** date for each pharmacy.

This screenshot shows the configuration screen for splitting a prescription. It has two sections, one for 'Pharmacy #1' and one for 'Pharmacy #2'. Each section includes a 'Days Supply' dropdown (set to 'days'), a 'Quantity' field (set to '14' for Pharmacy #1 and '90' for Pharmacy #2), a 'capsule' dropdown, a 'Refills' field (set to '0'), a 'Substitution permitted' dropdown, and a 'Do Not Fill Before' date field (format: mm/dd/yyyy). There are also text boxes for 'Additional Notes To Pharmacist' with a '+' icon. A red box highlights the '+ Split' button between the two pharmacy dropdowns. At the bottom, there is a note: 'Note: Using both quantity fields will create two prescriptions. Since this a split prescription, please review the dispensing instructions carefully and adjust as necessary.'

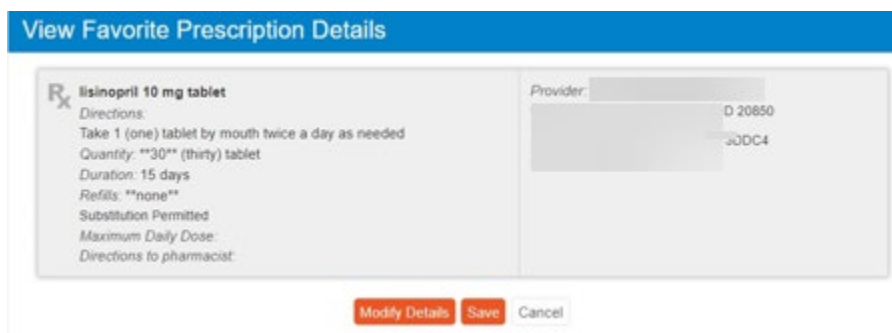


## Creating a Favorite Prescription:

To create a favorite within the **Prescription Management** section, click the star icon on the far right-hand side. A star icon that is already yellow, indicates that a prescription is already a favorite.



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



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

## Prescribing a Favorite Prescription:

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

Recently used favorites will be displayed in the right column. This list will display the 10 most recent prescriptions from the last 10 days. The display of these lists will depend on the provider location's settings.

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







## PRESCRIBING CONTROLLED SUBSTANCES

### Electronic Prescribing of Controlled Substances (EPCS) Onboarding:

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

If you previously completed the EPCS onboarding and has e-prescribed controlled substances, before you can begin e-prescribing controlled substances in CalMHSA Rx, contact MIS at [BHS\\_EHRAccessRequest.hhsa@sdcounty.ca.gov](mailto:BHS_EHRAccessRequest.hhsa@sdcounty.ca.gov) to have your EPCS account activated.

### Signing a Controlled Substance Prescription:

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

### From the Review Screen:

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

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

**Prescription Management**

1 Controlled Substance Prescriptions for 1 Patient(s) still require Two-Factor Authentication

Pending CS Prescriptions - Patient 1 of 1 Signing Protocol Help

PATIENT: Patient Demo

PRESCRIBER: [Redacted], MD  
Ave. [Redacted]  
0

Location Name: DrFirst Family Medicine

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

Medication	Qty	Rfl	Written	Effective	Notes	Pharmacy	Serial #
<input checked="" type="checkbox"/> Adderall 7.5 mg tablet C-II Take 1 tablet by mouth once a day as needed.	30 tablet	0	04/08/2019			Corner Md [Redacted] 10	S [Redacted] 37

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

\*\*\*\*\*    Hard token - [Redacted]    [Redacted]

**Sign 1**    **Skip All**



## From the Prescription Management

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

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

Signature Password

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

At the top of the screen, you will see how many legend prescriptions were sent and you can see how many pending controlled substance prescriptions are to be completed. Check the box next to the medication name and enter your two-factor authentication to complete the prescription.

Prescription Management

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

Pending CS Prescriptions - Patient 1 of 1 Signing Protocol Help

PATIENT

PRESCRIBER  MD  Location Name E-prescribing Demo

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

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

Signing Passphrase  Token Device key fob -  Token PIN  Sign 2 Skip All

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

## From a Prescription Report:

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

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



4. Select the appropriate Status6
  - a. **All**: displays pending and completed prescriptions.
  - b. **Pending**: displays only prescriptions that have not had any action taken on them.
  - c. **Completed**: displays completed prescriptions (signed and sent or signed and printed).
    - i. When **Completed** is selected, a date filter is displayed. Select a date range.
  - d. **Undeliverable**: displays prescriptions that have not been delivered to the pharmacy.
5. Click on the **Display Report** icon to show the report on screen. All prescriptions that match the criteria will be displayed below.
6. The report contains multiple columns and will show you the Status of the prescription and sig details, allowing you also to act on each prescription.
  - a. **Status**: shows whether a prescription was successfully sent to the prescription's destination. Hover your mouse over the icon to display the meaning for each icon.
  - b. **Action**: depending on the status of the prescription, different Actions will display. Hover your mouse over an icon to display an explanation for each Action.
    - i. **Favor**: adds the prescription to your Favorites List.
    - ii. **Modify**: allows you to modify the prescription before completing it.
    - iii. **Delete**: allows you to delete any instance of the prescription.
    - iv. **Cancel**: cancels the prescription and sends a notice to the pharmacy.
    - v. **Print**: reprints a completed prescription.
    - vi. **Resend**: resends a completed prescription.
    - vii. **Renew**: renews a completed prescription.
7. Select the prescriptions to complete by checking the box to the left of the desired prescription. Pending prescriptions can be completed from the Prescription Report.
8. Enter your **Signature Password**.
9. Click one of the action buttons: **Send**, **Send & Print**, **Print don't Send**, or **Sign don't Send**.

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

Patient				
Patient Consent: <input checked="" type="radio"/> Yes <input type="radio"/> No		Pharmacy Camden Pharmacy		
SEX	HEIGHT	WEIGHT	ADDRESS 98 Bayview Ave New Rochelle, NY 10805	HOME PHONE
DOB	UPDATED			



# ALERTS

## Clinical Alerts:

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

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

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

The screenshot displays the 'Prescription Summary' interface. A red box highlights a 'Clinical Alerts' pop-up window on the right side. The alert is for 'Pregnancy' and lists 'lisinopril 5 mg tablet' as the medication being prescribed. Below the alert, there are sections for 'Geriatric' and 'Lactation' with exclamation mark icons. At the bottom of the alert window, a text area is labeled 'Provide a justification for this medication.' with a dropdown menu and a 'Close' button. The main interface shows the medication selection process for 'lisinopril 5 mg tablet', including fields for patient observation, provider, pharmacy, and directions. A red box also highlights a message at the top of the main interface: 'Please acknowledge alerts in order to proceed.'



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Below are the clinical alerts within CalMHSA Rx:

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

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

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

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

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

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

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

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

### **Formulary Alerts:**

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

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

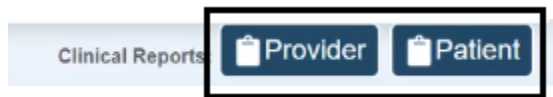
**Please Note:** SureScripts provides formulary information from health plans, Pharmacy Benefit Managers and Payers such as Blue Cross, Anthem, MAMSI, etc. SureScripts may not provide eligibility for all government-funded formularies such as Medicaid or some small regional payers.





## CLINICAL REPORTS

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



### Provider Clinical Report

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

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

Provider Clinical Report ← Back

Patient Details: DOB: [REDACTED], Height: [REDACTED], Weight: [REDACTED], Gender: [REDACTED]

Responsible Provider: [REDACTED]

Default Pharmacy: [REDACTED]

**Export EHI**

Medications - Active Medications  
(P) Last reconciled by [REDACTED] on 08/19/2024 02:39:10 PM EDT

Name	Directions	Qty	RR	Start	Stop	Last Written	History Source
acetaminophen 500 mg capsule	Take 1 capsule by mouth twice a day for 60 days 2 hours before meals	120 capsule	0	08/19/2024		08/19/2024	
Office Comments: Testing 123							
Adderall 10 mg tablet C - II	Take 1 tablet by mouth once a day for 30 days	30 tablet	0	08/05/2024		08/05/2024	
Dantrium 25 mg capsule	Take 1 capsule by mouth once a day as needed for pain 1 or 2 days rest rest please take with food	6 capsule	1	08/19/2024			Family

### Patient Clinical Report:

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

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



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

Patient Clinical Report
← Back

**PATIENT DETAILS**

DOB: [REDACTED]

Height: Unknown

Weight: Unknown

Gender: male

**DEFAULT PHARMACY**

CVS/pharmacy # [REDACTED]

[REDACTED]

Ph. (301) [REDACTED]

Fx. (301) [REDACTED]

**Medications**

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

**Allergies - Active Allergies**

Allergy	Reaction
Keflex	swelling

If you encounter issues with CalMHSA Rx, visit [CalMHSA Rx - 2023 CalMHSA](#).

If you have clinical questions, contact [qimatters.hsa@sdcountry.ca.gov](mailto:qimatters.hsa@sdcountry.ca.gov).

