



## **Enabling Surescripts Medication History**

This Tip Sheet will walk users through Enabling Surescripts medication history. This Tip Sheet may change as our trainings and systems are updated. Please visit our website <a href="https://dhs.saccounty.gov/BHS/BHS-EHR/Pages/Avatar.aspx">https://dhs.saccounty.gov/BHS/BHS-EHR/Pages/Avatar.aspx</a> for the most updated version. If any additional help is needed you can contact us at 916-876-5806 or at <a href="https://bhs-ehrsupport@saccounty.gov">bhs-ehrsupport@saccounty.gov</a>.

## **Important Information:**

Surescripts supports sending medication history information on patients back to SmartCare, including medications prescribed through Surescripts from a source outside of SmartCare. To enable this functionality the following conditions must be met:

- 1. The Client must have a signed **Medication History Request Consents** document on file. This consent:
  - a. Must be signed by the Clinician.
  - b. Must be signed (or have a documented verbal consent) by the Client.
  - c. Must have a start date.
  - d. Must have an end date.
- 2. The Client must have a Service scheduled:
  - a. With a practitioner who has an SPI on file in Smartcare (RX enabled).
  - b. With a date of service **AFTER** the start date of the consent above.
  - c. With a date of service within the next 3 days.
- 3. If the above conditions are met, the RX history will be pulled in.
  - a. For future scheduled appointments, a nightly job will pull in the history automatically.
  - b. For same day services, the pull can be triggered by the prescriber (see below)

## Completing the Medication History Requests Consents (Client) screen

4. With your client selected, open the **Medication History Request Consents (Client)** screen.







- 5. Open a new form by clicking the New button in the top right corner.
- 6. Select the appropriate program from the drop down and click **OK**

CDAG	CDAG Program Enrollment					
	Select Program Enrollment					
	xxxxSacCo-APSS-Broadway-07/01/2023					
	OK Cancel					

- 7. Once the form is open you must enter a Start Date and an End Date.
  - a. The Start Date must be **<u>before</u>** the date of service you want to pull.
  - b. The End Date should be 1 year after the consent was completed.
- 8. Click the sign button. This will generate the Clinician signed document.

Medication History R	equest C	Consents					C E	i 🖄 🕒 Goto 🚨 🧞 🛅 🖶 🗅
Effective 02/07/2024		Status New		Author Sawyer, John	~	01/24/2024	• • •	Sign
Consent								· · · · ·
Patient medication history is a pharmacies and health insure	list of prescri rs, contribute	iption medicines that our p to the collection of this his	actice providers, or other pro ory.	oviders, have prescribed for you. A	ariety of sources, inc	luding		
Medication history is very imp interactions. It is important th pharmacies do not make drug over-the-counter drugs, suppl	ortant in help at you and yo history inforn ements, or he	ing healthcare providers tre ur provider discuss all your nation available, and your d erbal remedies that patient:	It your symptoms and/or illn nedications to insure that yo ug history might not include take on their own may not b	ness properly and in avoiding poten our recorded medication history is 2 e drugs purchased without using yo be included.	ially dangerous drug 00% accurate. Some Ir health insurance. A	lso		
Signing this document gives us Start Date 02/01/2024	s permission t	to obtain your medication h	tory from your pharmacy, he	ealth plans, and other healthcare p	roviders.			

9. Click the + button above the Clinician signed pdf.





Medication History Request Co	nsents	ľ:	🖻 😫 G	юто 💄 🧞	i 🗇	<del>8</del> 0	Save
Effective 02/0 # Status Signed	Author Sawye	r, John	01/24/2024	00		Sign	2 🛃 +
Document							
PdfBytesHandler.axd				1 / 1	-	- 1009	% +
	758277000						
	Client Name:	Test, Er	ntry				

## 10. Click on the circular button next to the client' name and click "Co-Sign"

Signer		
Add Signer(s)	✓ OX Test, Entry	•
Co-Sign	Decline	-

- 11. A signature window will open for the client. Click on the circular button next to the appropriate option based on how you are obtaining the client's signature
  - a. All the choices are acceptable to trigger the exchange.
- 12. Click Sign to enter the client's signature.





SignaturePage				
	Test, Entry is signing the	e Medication History Red	quest Consent	s
Test, E	intry	02/07/2024	2:25 PM	
Password 💿 Signature Pa	d 🔿 Mouse/Touchpad	Client Signed Pape	er Document	O Verbally Agreed Over Phone
Sign Clear	Cancel			

13. Once the signed consent is on file, and an appointment or service exist <u>AFTER</u> the start date of the consent (see Step 7) open the **Medication Management (RX)** screen.

Patie	nt Summary			Patient Search	Consent History Medication Hist				
Prefe	Preferred Pharmacy Patient Overview Reconciliation Eligibility Medication History								
Medica	tion Dispensed:				<b>A</b>				
No.	Drug Description	Product Code	Quantity	Date	Substitutions				
1	ATOMOXETINE 40MG CAP	31722071730ND NDC11	Quantity Received: 30	Last Fill Date: 2024-01-10	Allowed				
2	VENLAFAXINE ER 37.5MG CAP	31722000290ND NDC11	Quantity Received: 30	Last Fill Date: 2024-01-10	Allowed				
3	DOXYCYCLINE HYCLATE 100MG TAB	42806031250ND NDC11	Quantity Received: 14	Last Fill Date: 2023-12-26	Allowed				
4	DOCUSATE SOD100MG CAP	00904728060ND NDC11	Quantity Received: 30	Last Fill Date: 2023-11-04	Allowed				
5	POLYETH GLYC3350 NF PACK POW	62559015710ND NDC11	Quantity Received: 14	Last Fill Date: 2023-11-04	Allowed				
Print List Change Order Complete Order Patient Consent General Medication Consent V Run Report Real-Time Med History									

- 14. If the Overnight Job has run, you can click on the Medication History tab and scroll through the responses from Surescripts
- 15. If the Overnight Job has not run yet, click the "Real Time Med History" button to trigger an exchange