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 https://dhs.saccounty.gov/BHS/BHS-EHR/Pages/Avatar.aspx for the most updated version. If any additional help is needed you can contact us at 916-876-5806 or at bhs-ehrsupport@saccounty.gov.

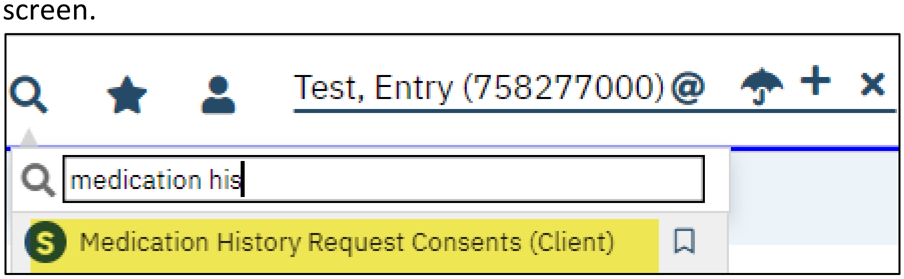
Important Information:

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:

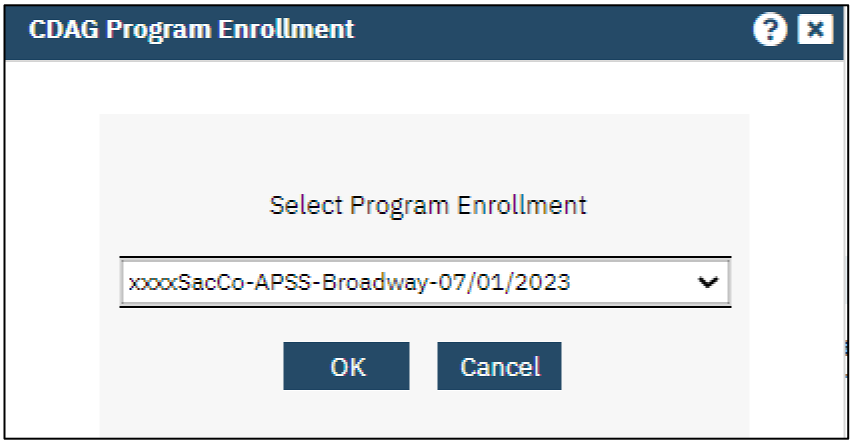
1. The Client must have a signed **Medication History Request Consents** document on file. This consent:
    a. Must be signed by the Clinician.
    b. Must be signed (or have a documented verbal consent) by the Client.
    c. Must have a start date.
    d. Must have an end date.
2. The Client must have 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

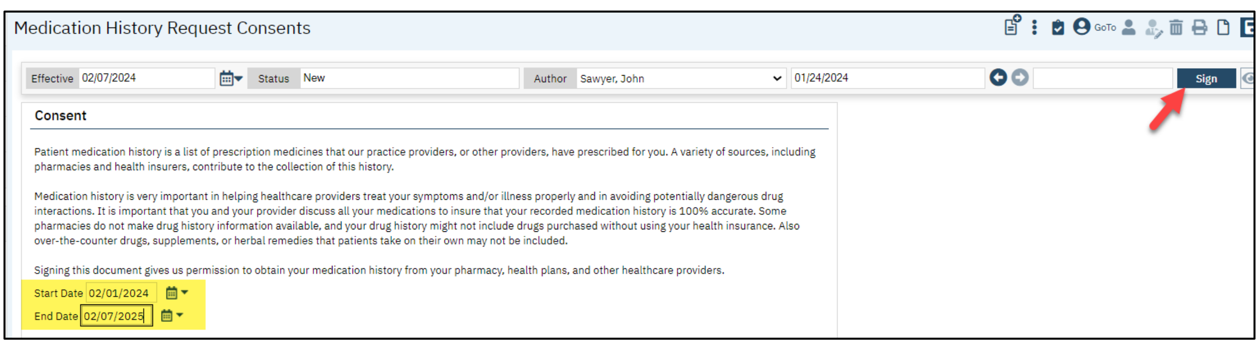
4. With your client selected, open the **Medication History Request Consents (Client)** screen.



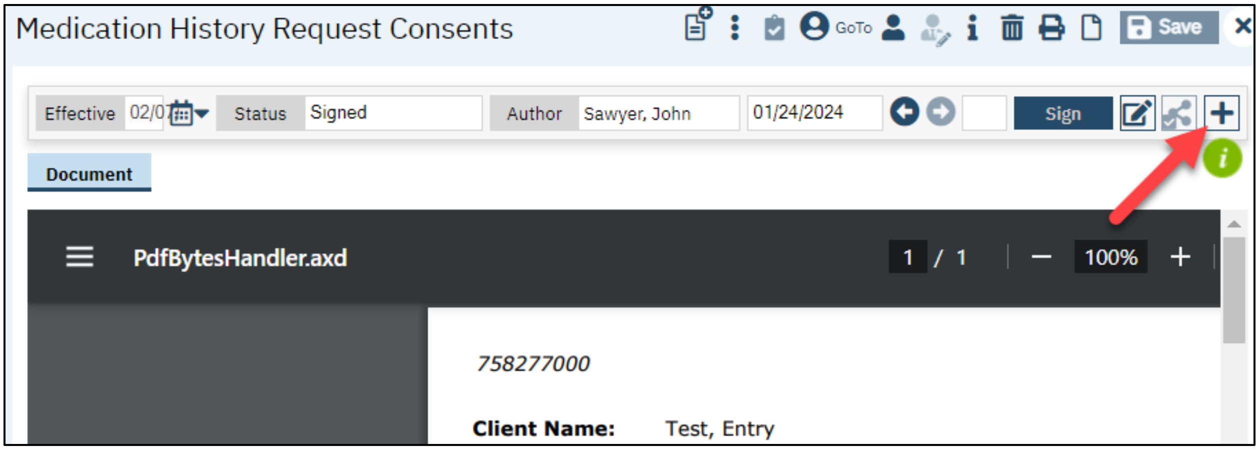
5. Open a new form by clicking the New button in the top right corner.
6. Select the appropriate program from the drop down and click **OK**



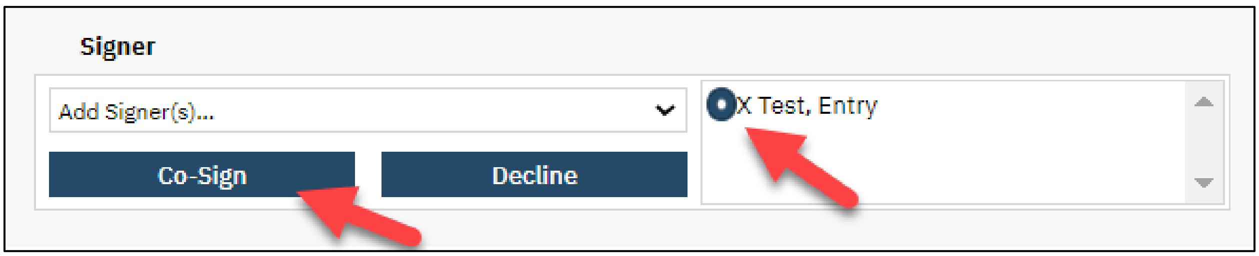
7. Once the form is open you must enter a Start Date and an End Date.
    a. The Start Date must be **before** the date of service you want to pull.
    b. The End Date should be 1 year after the consent was completed.
8. Click the sign button. This will generate the Clinician signed document.



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

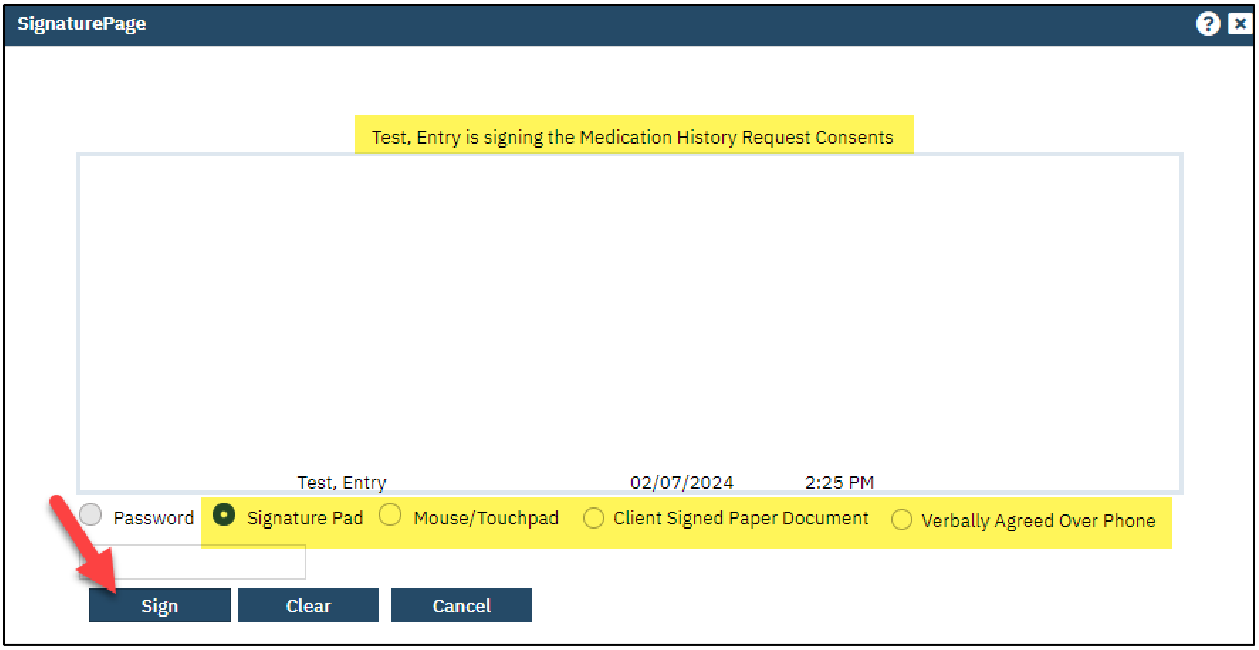


10. Click on the circular button next to the client' name and click "Co-Sign"

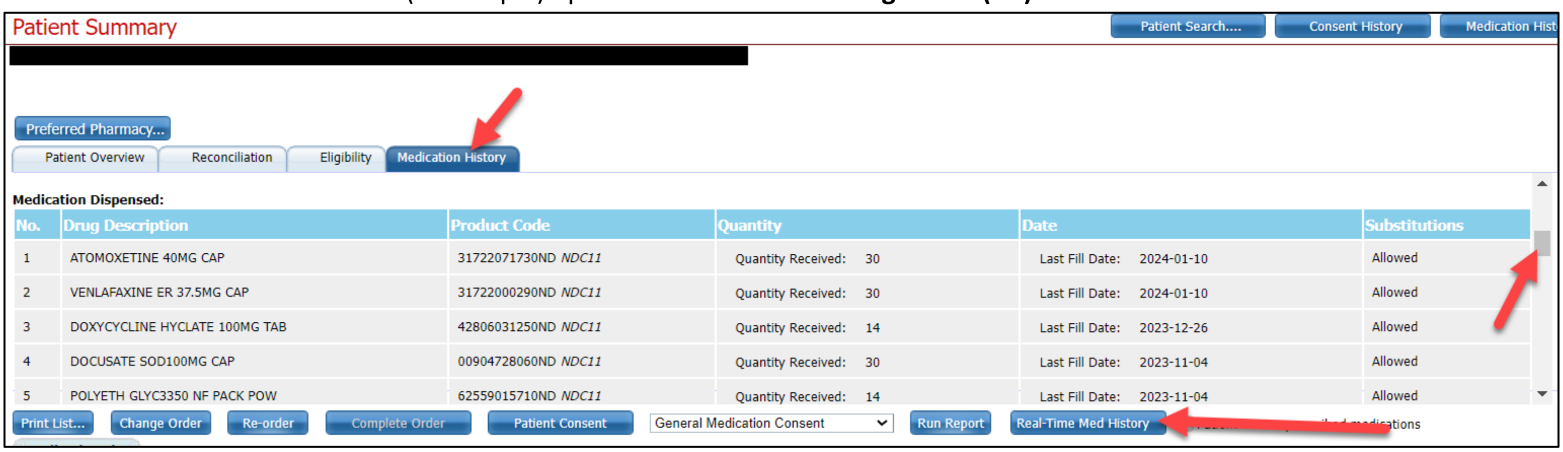


11. A signature window will open for the client. Click on the circular button next to the appropriate option based on how you are obtaining the client's signature
    a. All the choices are acceptable to trigger the exchange.

12. Click Sign to enter the client's signature.



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.



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