

Specialty Patient Enrollment Quick Reference Guide

Introduction

ChartMaker® Clinical has been updated with a new Specialty Patient Enrollment (SPO) functionality that activates when a specialty medication is selected in the Prescribe Medication screen, locking into a **Specialty Patient Enrollment** process that automates the specialty prescription initiation and renewal process, allowing you to electronically send enrollment forms to specialty pharmacies for the specialty medication. Once the specialty medication has been confirmed and sent, via the Confirm Prescription screen, a Specialty Enrollment Request is automatically sent to the specialty pharmacy. **No action is needed by users to send this request.** This automated task prepopulates the specialty medication enrollment form with information from the patient's chart and routes the form electronically to the appropriate specialty pharmacy. *If the specialty pharmacy does not request additional information, or any additional medication services acknowledgement, no other clinical staff involvement is needed.*

Prescribe Medication

Orencia 125 mg/mL subcutaneous syringe (Rx, Brand)

Rx History Consent: [Yes](#) [Rx](#) [User](#) [Specialty Rx](#)

Prescription

Route: [subQ](#)

Orencia 125 mg/mL subcutaneous syringe

Action: [Take](#)

Dose: [1](#)

Dose Units: [syringe \(mL\)](#)

Frequency: [Every 6 hours](#)

Dispense: [30](#) [Milliliter](#)

Add'l SIG: [\[Edit\]](#)

Refills: [\[Dropdown\]](#) ☒ Substitution OK

Days Supply: [8](#) Max Dose: [\[Dropdown\]](#)

Notes to Pharmacist: [Do not include clinical information in this field](#) [Clear](#)

Started: ☒ 2/26/2020 [\[Calendar\]](#)

Ended: ☐ 2/26/2020 [\[Calendar\]](#)

Earliest Fill: ☐ 2/26/2020 [\[Calendar\]](#)

☐ Sample Lot #: [\[Dropdown\]](#)

Expiration Date: ☐ 2/26/2020 [\[Calendar\]](#)

☐ PDMP queried [PDMP Report](#)

☐ Administered during visit

☐ Initial order created outside of Clinical

☐ Print patient prescription savings material

Real Time Prescription Benefits (* = Alternative Medication)

Error

Real Time Prescription Benefit data is unavailable.

The pricing/coverage data is a point in time calculation based upon the Quantity and Days Supply provided and may vary once the prescription is filled at the dispensing pharmacy. Any returned alternative information is informational only and not intended to replace clinical decisions

Real Time Patient Savings

No offer was found for the request

Formulary

Current Drug Selection

Payer	Medication	Status	Coverage	Copay	Copay Info
CERT PBM-B-PLANZ	Orencia 125 mg/mL subc...	On Formulary	N/A	N/A	

Drug Alternatives (* = Payer Specified)

Payer	Medication	Status	Coverage	Copay	Copay Info
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Payer: [CERT PBM-B-PLANZ](#)

Transmission: [E-Prescribe](#) [Diagnosis](#)

SIG: [Take 1 syringe \(mL\) subcutaneously Every 6 hours](#)

Pharmacy: [CVS Pharmacy # 6508 : 529 W. MAIN ST., BUTLER, IN 46721 \(2608689140\)](#) [+](#)

ePA is not required [Override](#) [Cancel](#) [Back](#) [Next](#)

Prescribing a Medication

If you were E-Prescribing medications from Clinical before, and a **Location** is configured in the **Prescriber Setup** dialog (**Edit** > **System Tables** > **Prescribing** > **Prescriber Setup**), no additional user-intervention is needed to activate and use the Specialty Patient Enrollment functionality when prescribing a medication. *You will continue to prescribe a medication as you have previously, and whenever a specialty medication is being prescribed (based on the medication's NDC), the system will automatically activate the Specialty Patient Enrollment workflow.*

The Prescribe Medication screen has a **Specialty Rx** button, in the top-right of the dialog, that will appear blue when prescribing non-specialty medications (see Figure 1), but will turn purple whenever a specialty medication is being prescribed that requires additional enrollment information (additional diagnosis, medication, allergy, weight, etc.) to be sent along with the prescription information. See Figure 2.

NOTE

You can click the **Specialty Rx** button for non-specialty medications to manually enable the **Specialty Patient Enrollment** workflow. However, when a specialty medication is being prescribed, you cannot “opt out” of the Specialty Patient Enrollment workflow.

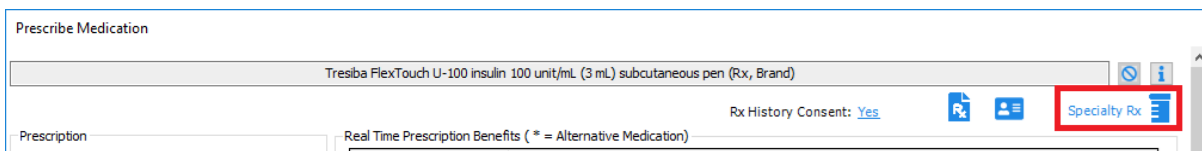
The screenshot shows the 'Prescribe Medication' dialog box. At the top, the medication is 'Tresiba FlexTouch U-100 insulin 100 unit/mL (3 mL) subcutaneous pen (Rx, Brand)'. Below this, there's a 'Prescription' section with 'Real Time Prescription Benefits (* = Alternative Medication)'. On the right side, there are several icons: a blue 'Rx' icon, a blue 'Specialty Rx' icon (highlighted with a red box), and a blue 'i' icon. The 'Specialty Rx' icon is blue, indicating it is inactive for this medication.

Figure 1 – Prescribe Medication – Specialty Rx (Inactivated)

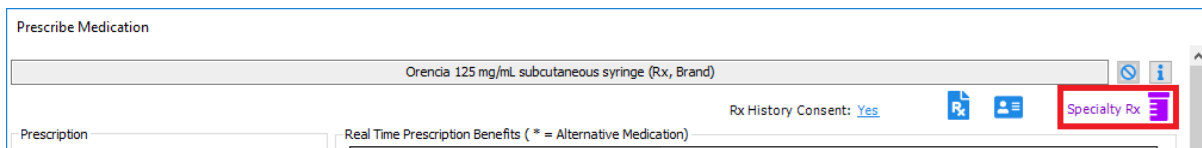
The screenshot shows the 'Prescribe Medication' dialog box for 'Orencia 125 mg/mL subcutaneous syringe (Rx, Brand)'. The layout is similar to Figure 1, but the 'Specialty Rx' icon (highlighted with a red box) is purple, indicating it is active for this medication.

Figure 2 – Prescribe Medication – Specialty Rx (Activated)

In the Confirm Prescription screen, the Prescription section has been updated so that whenever the Specialty Patient Enrollment workflow is activated (either automatically or manually), a **Specialty Rx** icon will appear in the left hand side of the Prescription section to further alert you that that medication will be locked into the Specialty Patient Enrollment process. See Figure 3.

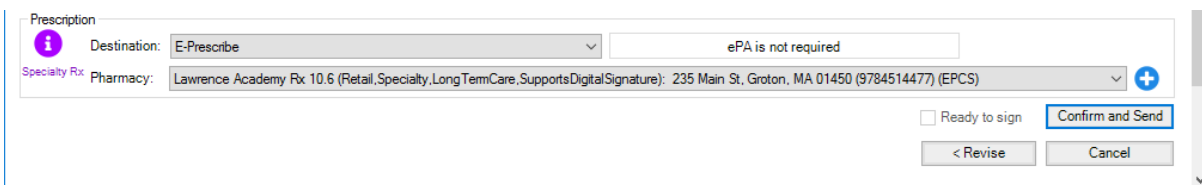
The screenshot shows the 'Confirm Prescription' dialog box. The 'Prescription' section on the left has a purple 'Specialty Rx' icon. The 'Destination' is 'E-Prescribe' and 'ePA is not required'. The 'Pharmacy' is 'Lawrence Academy Rx 10.6 (Retail, Specialty, Long Term Care, Supports Digital Signature): 235 Main St, Groton, MA 01450 (9784514477) (EPCS)'. At the bottom, there are buttons for '< Revise', 'Confirm and Send', and 'Cancel'. A 'Ready to sign' checkbox is also present.

Figure 3 – Confirm Prescription – Specialty Rx

After the specialty medication has been confirmed and sent, via the Confirm Prescription screen, a Specialty Enrollment Request is automatically sent to the specialty pharmacy. *No action is needed to send this request.* This automated task prepopulates the specialty medication enrollment form with information from the patient's chart and routes the form electronically to the appropriate specialty pharmacy. If the specialty pharmacy does not request additional information, or any additional medication services acknowledgement, no other clinical staff involvement is needed.

Responding to a Specialty Patient Enrollment Task

If the pharmacy requires additional information or acknowledgement for the specialty patient enrollment, then the system will return a **Specialty Medication Enrollment** type message to the user's To-Do List with a subject heading of **Specialty Medication Enrollment Action Required** indicating that you need to complete the enrollment process for the patient. Use the following steps to respond to an Action Required task.

1. In the To-Do List, double-click the message with a subject heading of **Specialty Medication Enrollment Action Required**.

To-Do List for: Craig M Peterson (CRAIG)

New Delete View Transfer Print Refresh Priority: [Up Arrow] [Down Arrow]

Date	From	Priority	Subject	Type	Patient	Start
02/27/2020	System	Normal	Specialty Medication Enrollment Action Required	Specialty Medication Enrollment	Whiteside, Kara	
02/27/2020	System	Normal	Specialty Medication Enrollment Action Required	Specialty Medication Enrollment	Dockendorf, Tad	

1-25 of 194 items RRR = Read Receipt Requested ☐ Show Completed Items

Please complete the Specialty Enrollment process for the following E-Rx:
Patient: Kara Whiteside
Medication:
Orencia 125 mg/mL subcutaneous syringe
Bannockburn Pharmacy

2. This will open the applicable patient's chart. In the patient's facesheet, click the * button next to the medication with the **[SPO ACTION REQUIRED]** indicator that is highlighted orange, and then click **Open SPO Status dialog**.

NOTE

To access this **Open SPO Status dialog** option, you must have a **Specialty Patient Enrollment** privilege of **Submitter** or **Viewer**, as well as a **Prescribing** privilege of **Proxy** or **Prescriber**. If you do not have these privileges, the menu item will be grayed out and not accessible. You can also access the SPO Status dialog at any time by clicking **Chart > Specialty Patient Enrollment**, which also requires those privileges to access.

Next Appointment
Advance Directives
Problem/Diagnosis List
Inactive Diagnosis List
Pre-Existing Diagnosis
Medication List

* [SPO ACTION REQUIRED] - Orencia 125 mg/mL subcutaneous syringe 02-28-20
Take 1 syringe (mL) subcutaneously Every 6 hours

- Queue for Printing
- Queue for E-Prescribe
- Renew Prescription
- Discontinue Prescription
- Cancel Prescription
- Open ePA Status dialog
- Open SPO Status dialog
- Medication Interactions (RxlNT)
- Medication: Orencia 125 mg/mL subcutaneous syringe
- Dispense: 30 Milliliter
- Sig: Take 1 syringe (mL) subcutaneously Every 6 hours
- Days Supply: 8
- Refills: 0
- Prescribed by: CRAIG
- Started: 2/28/2020 7:34:01 AM
- Last Renewed: 2/28/2020 8:34:26 AM
- Status: Success
- Status Date: 2/28/2020 8:34:59 AM
- Last E-Rx Pharmacy...
- View Medication Info...

3. This opens the SPO Status Worklist. There will typically be two types of tasks in the worklist: **Complete Additional Medication Services** and **Respond to Pharmacy**. The former requires you to acknowledge or attest that patient consent was obtained to submit patient enrollment data to a third-party specialty hub, and then to complete the enrollment process which entails clicking a button and verifying information. The latter requires additional information or data from the pharmacy in order to dispense the medication.

Click the worklist **Task** you want to access.

*****NOTE*****

Depending upon the volume of requests, you may need to scroll or use the **Filter** options to locate the specific request you want to process.

Worklist

Task History

Worklist


Task	Patient	DOB	Due	Created	Description
Respond to Pharmacy	Davis, Angela	1966-08-02	2019-10-23	2019-10-23	Humira 40 mg/0.8 mL subcutaneous syringe kit
Complete Additional Medication Services	Davis, Angela	1966-08-02	2019-10-23	2019-10-23	Humira 40 mg/0.8 mL subcutaneous syringe kit
Complete Specialty Enrollment Request	Davis, Angela	1966-08-02	2019-10-23	2019-10-23	Enbrel 25 mg (1 mL) subcutaneous solution

4. If the **Complete Additional Medication Services** task was clicked, a Third-Party Services Available screen will appear outlining the specialty hub name and the services they provide for the specific medication that is being prescribed. Below the that hub information is standard legal language that indicates that you have obtained consent from the patient to share their data with the third-party specialty hub.

Click the **I Attest** option to confirm written authorization or patient consent was received.

If the patient does not consent, click the **Decline Third Party Services** button, this will then remove the task from the worklist, and will not complete the specialty hub enrollment for the patient.

Doe, Jane
DOB: 1952-09-05 Gender: Female

Humira 40 mg/0.8 mL subcutaneous syringe kit 

Third-Party Services Available
Third-party services are available for this medication. In order to utilize them you must attest to the agreement below.

Demo Hub has a workflow available for Humira to help you electronically provide patient support services which may include: eConsent, financial support, and Prior Auth.

I attest that I have obtained written authorization and/or patient consent, including those required by all applicable federal and state laws and regulations, prior to disclosing PHI and/or submitting completed patient enrollment forms to any third party. I will maintain all written authorization/patient consent forms as part of the patient file, consistent with applicable federal and state laws and regulations.

I Attest

Decline Third-Party Services

If the patient did provide consent, and the **I Attest** button was clicked, a Complete Services Request screen will appear. Click the **Complete Now** button to complete the enrollment.

If you click the **Complete Later** button, you will return to the Worklist and this item will remain on the Worklist until completed.

Worklist Task History

Doe, Jane
DOB: 1952-09-05 Gender: Female

Humira 40 mg/0.8 mL subcutaneous syringe kit Options ▾

Complete Services Request

Do you wish to complete Demo Hub services now or later?

Complete Now Complete Later

After the **Complete Now** button is clicked you will be transferred to the third-part specialty hub to verify the patient's enrollment information. The information contained here is the same enrollment information that was originally sent to the specialty pharmacy and is populated into the specialty hub's enrollment form. You can then review the information, as well as add any additional information if needed.

After validating the information, click the **OK** button. This enrollment will then be completed for the Specialty Hub to facilitate enrolling the patient in assistance programs, and any other services provided by the hub.

Demo Hub Enrollment information for Humira 40 mg/0.8 mL subcutaneous syringe kit

Doe, Jane
DOB: 1952-09-05 Gender: Female

Patient	
Name	Medical Records Id
Doe, Jane	mm-111
Date of Birth	Phone
1952-09-05	(612) 555-1212

Medication	
Name	Day's Supply
Humira 40 mg/0.8 mL subcutaneous syringe kit	Sig
Qty	inject 0.8 milliliter (40 mg) by subcutaneous route every 2 weeks
0.8	

Provider	
Name	
Ciulo, Erik	
Pharmacy Name	
Demo Specialty	

Payer	
Name	Phone
Demo PBM	(612) 555-7890
Email	Fax
priorauth@payer.com	(612) 555-6543

Summary

Active Medications
Crestor 40 mg tablet OxyContin 20 mg tablet, crush resistant, extended release Humira 40 mg/0.8 mL subcutaneous syringe kit Zyrtec-D 5 mg-120 mg tablet, extended release atorvastatin 10 mg tablet metoprolol tartrate 100 mg-hydrochlorothiazide 25 mg tablet

Active Problems
Pyrogenic Arthritis Orbital Osteomyelitis

Allergies
Peanut Butter Flavor honey

Diagnosis
M15.0 Primary generalized (osteo) arthritis

Date of Diagnosis
Wed Jun 17 2020

Patient Height (inches)
62

Date height was measured
Wed Jun 17 2020

Patient Weight (inches)
105

Date weight was measured
Wed Jun 17 2020

Will prior authorization be initiated by the prescriber/prescriber's office?

Ok

After this task has been completed, it will be removed from the Worklist, and transferred to the Task History tab.

- To complete a **Respond to Pharmacy** task, enter any free-text information in the corresponding fields, and/or attaching a PDF document, by clicking the **Choose File** button, that satisfies the needs of the request.

After this task has been completed, it will be removed from the Worklist, and transferred to the Task History tab.

Worklist

Task History

Doe, Jane

DOB: 1952-09-05 Gender: Female

Humira 40 mg/0.8 mL subcutaneous syringe kit

PLEASE RESPOND TO THE PHARMACY

Please provide date of patient's last office visit

Include clinic notes, labs, pathology report, treatment plan

Choose File

Respond to Pharmacy

Close without Responding

- You can then repeat steps 3 – 5, for any other outstanding Worklist items in the SPO Status dialog, as needed.

Responding to a Specialty Patient Enrollment Error

If the **Pharmacy** selected when prescribing the specialty medication is not updated for electronic specialty enrollment, or if there is another issue with sending the Specialty Patient Enrollment, then the system will return a **Specialty Medication Enrollment** type message to the user's To-Do List with a subject heading of **Specialty Medication Enrollment Request Error** indicating that the specialty enrollment process failed, and that you will need to follow-up manually with the pharmacy to complete the enrollment process. When you double-click this type of message the applicable patient's chart will open allowing you to view the information about the prescribed medication.

To-Do List for: Craig M Peterson (CRAIG)

New



Delete

View

Transfer

Print

Refresh

Priority:  

Date	From	Priority	Subject	Type	Patient	Start	Target
02/28/2020	System	Normal	Specialty Medication Enrollment Request Error	Specialty Medication Enrollment	Doe, John		
02/28/2020	SYSTEM	Normal	Unmatched Lab Notification	Reminder			

1-25

of 196 items

RRR = Read Receipt Requested

Show Completed Items

The Specialty Enrollment request failed to process electronically for the following E-Rx below. Please follow up with the pharmacy to continue the enrollment process.

Patient: John Doe

Medication:

Orencia 125 mg/mL subcutaneous syringe

CA Pharmacy 10.6MU