

Managing Clean Up of Pharmacy Orders for Quick Reference Guide

This quick reference guide provides best practices for cleaning up the Pharmacy Orders area of the Orders Portal. Completing these steps in the order listed is the best approach for clean-up.

Step	Action
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Discontinuing active orders for discharged residents.

1. Navigate to Clinical > Orders > Pharmacy Orders > Discharged with Active Orders.
2. Click the resident name to go to the Orders tab of their chart. Use Batch Update to Discontinue all active and on hold orders.

1.



Note

Discontinued orders no longer appear in the Pharmacy Orders portal as To Be Ordered or On Order (manual or electronic).

Step	Action
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Managing medication source and To Be Ordered supplies.

1. Navigate to Clinical > Orders > Pharmacy Orders > To Be Ordered. This tab contains new orders or reorders with a source that is a non-integrated pharmacy.
2. Click **+** to expand each medication and review the source. If it is incorrect, do the following:
 - Click the resident name to go to the Orders tab of their chart.
 - Click **update** for each order to change the source or use **Batch Update** to **Reassign Pharmacy** for multiple medications at one time.
 - Click **+** to expand and delete or exhaust the incorrect supply and communicate to pharmacy if needed.
3. After updating the source for all medications, in the Orders Portal > To Be Ordered, run the Pharmacy Requisition Report.

Marking medications as received in On Order (Manual).

1. Navigate to Clinical > Orders > Pharmacy Orders > On Order (Manual). This tab contains the Orders that were in a To Be Ordered status and now have a status of On Order after running the Pharmacy Requisition report. If the supply is on hand, they can be manually received.
2. To receive orders, do one of the following:
 - For individual orders: Click **rcv**, complete the fields as required and click **Receive**.
 - For multiple orders: Select each order, or select all and click **Receive All**.

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4. **Matching supply messages received electronically to resident orders - IMM Only**
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Step	Action
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It is recommended that all supply messages be received and linked to the orders. If the receiving process has not been maintained, there may be multiple supply messages for the same order.

1. Navigate to Clinical > Orders > Pharmacy Orders > Waiting to Be Received. This tab contains the supply messages received from the integrated pharmacy for supplies that have been processed. When a supply message is received and linked to the orders in the residents' chart, the order status changes from On Order to On Hand automatically.
2. The tab shows supply messages for the last 72 hours. To show all messages, open the **Display Filters**, clear the **Date Dispensed** field and click **Search**.
3. Supplies with a MAP link must be followed up on before the supply message can be received. Click **MAP**, select the resident the supply belongs to, click **Manually Link Supply to Resident**, and follow up with pharmacy to resolve the demographic discrepancy.
4. To receive the supply messages, click **rcv** or scan using the **Quick Supply Management** box, select the corresponding order, and click **Link Order(s)**.
 - You can elect to receive the most recent supply message for each order and mark the remaining supply messages as **Return To Pharmacy**. Mark messages for discharged residents as **Return To Pharmacy**. This does not send a message to the pharmacy, it simply moves the supply message to the Returned tab.



Note

If you are preparing for a pharmacy conversion, or are enabling Auto Receiving, you can leave the remaining supply messages. At the time of conversion or enabling, the remaining supply messages are cleared.

Step Action



Note

If, for any reason, a supply message should not be linked to an Order, select **Return To Pharmacy**. This does not change the status of the order to On Hand. If selecting to mark the supply as returned for an active or on hold order, review the order status and source and update if needed.

Reviewing orders that were previously marked as requiring Follow-Up *IMM Only*

1. Navigate to Clinical> Orders > Pharmacy Orders > Follow-Up. These supply messages must be received and linked to the orders or marked as returned.
2. To receive the supply messages, **rcv** or scan using the **Quick Supply Management** box, select the corresponding order, and click **Link Order(s)**.

5.



Note

If, for any reason, a supply message should not be linked to an Order, select **Return To Pharmacy**. This does not change the status of the order to On Hand. If selecting to mark the supply as returned for an active or on hold order, review the order status and source and update if needed.

Step	Action
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Managing new orders and reorders that are in a status of On Order with the integrated pharmacy - *IMM Only*

1. Navigate to Clinical > Orders > Pharmacy Orders > On Order (Electronic).
2. Click **+** to expand each medication and review the source. If it is incorrect, do the following:
 - Click the resident name to go to the Orders tab of their chart.
 - Click **update** for each order to change the source or use **Batch Update** to **Reassign Pharmacy** for multiple medications at one time.
 - Click **+** to expand and delete or exhaust the incorrect supply and communicate to pharmacy if needed.
6. 3. Review the remaining orders. These should be the orders that are currently on order with the integrated pharmacy. The Order Date is the original date of the order. If the supply for the order is already received and there is no corresponding supply message on the Waiting To Be Received, Follow-Up, or Returned tabs, click **mrcv**, complete the fields as required and click **Receive**.



Note

If the supply should have been received but has not been dispensed, contact the pharmacy. If reorder requests were submitted too soon, the order remains in an On Order status until the supply is received.

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7. See Monitoring Pharmacy Orders for tips on maintaining your database.