McKESSON Canada

propel Rx

NEW BRUNSWICK DRUG INFORMATION SYSTEM (DIS) USER GUIDE

PHARMACY TECHNOLOGY SOLUTIONS
A DIVISION OF McKESSON CANADA

Revision History

To maintain the accuracy of this document, any changes made will be noted in the table below. Please refer to this section before using this document to ensure no updates were made to the content you may be referencing.

Date	Revision
August 15, 2025	• Under Pharmacy Preferences, updated the Idle Time (Min.) section to reflect the new default of 20 minutes.
September 9, 2025	• Under Refusing and Refilling a Discontinued Prescription, added a step to reactivate the prescription first to reflect the updated DIS business rule.
October 1, 2025	• Under Batch Processing, added information about batch scheduling time restrictions.
December 19, 2025	• Under Correcting a Prescription, clarified the availability of the Manual Reversal button.

Helpful Links

Need more information on how to use Propel Rx? Refer to the Propel Rx Online Help.

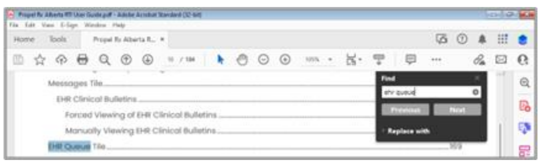
How to Use this User Guide

To navigate this user guide quickly, use the **Table of Contents** to find your topic or search for a keyword using one of the following features:

- **Find Feature** – Searches the PDF for your keyword and displays one result at a time in sequential order.
- **Advanced Search Feature** – Searches the PDF for your keyword and displays all the pages that contain that keyword on the left side. You can click on any page from the panel, and it will display the content on the side.

To use the Find Feature:

1. Select **Edit** > **Find**. The **Find** window appears.

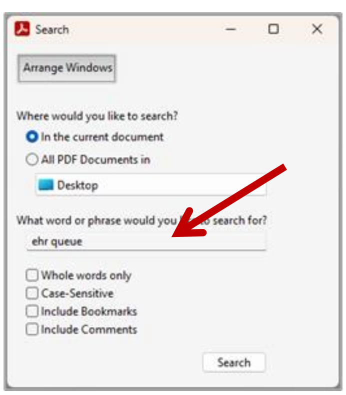


2. Enter in the keyword you want to search (e.g., EHR Queue).
3. Select **Next** to view the next page that contains the keyword you searched.

TIP: The **Find** window can also open by selecting **Ctrl + F** on the keyboard.

Using the Advanced Search Feature:

1. Select **Edit** > **Advanced Search.** The **Search** window opens.



2. Enter in the keyword you want to search (e.g., EHR Queue).
3. Select **Search**.
4. From the *Results* returned, select the page you want to view.

TIP: The **Search** window can also open by selecting **Shift + Ctrl + F** on the keyboard.

Contents

Getting Started

Introduction to eHealth

The New Brunswick Drug Information System (DIS) is a provincial database capturing community pharmacies' dispensed medication information, which is then displayed in real time within the provincial Electronic Health Record (EHR), Medication Summary Profile.

In many provinces including New Brunswick, the Prescription Monitoring Program Act requires pharmacies to submit all dispenses for in-province and out-of-province patients to the DIS, ensuring that all patients' medication profiles in the EHR are complete with vital clinical information necessary for appropriate and timely care.

ALERT: All personal health information is subject to statutory protection under the Health Information Protection Act (HIPA). As a result, access to patient data for all EHR enabled provinces are limited to those who are authorized and for security purposes by their organization, within user-defined roles.

Client and Provider Registry

The Client Registry (CR) and Provider Registry (PR) are provincial registries that interact seamlessly with the DIS. The CR maintains client identifiers and demographic information and is the source for validation of patient information. The PR maintains identification, demographic, and credential information of NB health service providers.

In New Brunswick, community pharmacies are one of the source systems contributing patient records to the provincial CR. Patient records maintained within Propel Rx (retail and non-retail) must be synchronized with the CR to ensure local patient information is added to the CR.

At this time, Propel Rx is not integrated with the PR. Provider information can however be sourced from a prepopulated list using MD Match.

Glossary of Terms

Terminology	Translation
Adverse Drug Reaction (ADR)	Any adverse event associated with the use of a drug, whether considered drug related or not, including the following: • An adverse event that can occur after using a drug. • An adverse event occurring from a drug overdose. • An adverse event occurring from a drug withdrawal.
Animal	Patient status to indicate the patient is not an active patient, but perhaps a family pet or pharmacy location, in the case of a stock transfer. An Animal record will have no provincial health number. Prescriptions for Animals are not transmitted to the DIS. Patients that had DIS activity in Propel Rx cannot change their Status to an Animal until all Dispenses have been reversed from their Patient Profile in Propel Rx.
CeRx	Pan-Canadian Electronic Drug Messaging Standard. Provincial Drug Information Systems comply to this standard.
Client Registry (CR)	A comprehensive registry of patient records from various sources that contain patient demographic information. This information can be reviewed by all users that have DIS access.
Clinician	A Clinician may be a prescriber, dispenser, or any other authorized health care professional given a role in the EHR.
Detected Issue	The list of conflicts that have been detected and recorded involving a patient's drug administration. Within Propel Rx, errors and validations are sometimes displayed via a Detected Issues Maintenance window. In New Brunswick, Detected Issues can be managed by correcting the data that caused the rejection or by resending the original message, if the issue was a technical error.
Dispense	The Dispense is the act of dispensing the prescription. This portion of the prescription is recorded on the DIS.
Dispense ID	In Propel Rx, this refers to the unique identifier that the DIS assigns to each dispense. This is not the same as the prescription number.

Terminology	Translation
Drug Information System (DIS)	A single, secure repository where health care professionals can view all the drugs dispensed to patients by a community pharmacy, regardless of the location or prescriber. **NOTE:** In New Brunswick, a full DIS Profile view is not visible from within Propel Rx. A patient's full DIS Profile can be viewed externally using the NB Clinical Viewer.
Electronic Health Record (EHR)	A clinical viewer including the patient medication profile that is populated by the DIS. The EHR checkbox throughout Propel Rx indicates whether the information resides on the EHR.
Electronic Medical Record (EMR)	The electronic medical record systems used by physicians.
Inferred Prescriptions	In New Brunswick, all Create prescriptions are deemed as inferred. This means, the DIS infers the prescription from a pharmacy dispense, and a Create message is not sent by the pharmacy.
National Association of Pharmacy Regulatory Authorities (NAPRA)	A voluntary association of provincial and territorial pharmacy regulatory bodies, as well as the Canadian Forces Pharmacy Services. NAPRA regulates the practice of pharmacy and operation of pharmacies in their respective jurisdictions in Canada. Their primary mandate is to protect the public.
Other Health Care Professional	Describes a health care provider from a regulated profession involved in the delivery of health care services.
Other Medication Record	A record of a drug the patient is taking but was not prescribed through the system. This could be a recommended over the counter (OTC) product or a dispense that occurred out of province. This could also be used when a patient is provided a medication sample. In New Brunswick, Other Medications are not transmitted to the DIS; they remain local only.
Out of Province	A patient status that indicates the patient does not reside in this province and has no NB health card number (Medicare) but may have another provincial health card number. These patients may or may not exist in the NB Client Registry (CR). Prescriptions for Out of Province patients must be transmitted to the DIS.
Patient	A person who is a recipient of a health care service.

Terminology	Translation
Personal Health Number (PHN)	A unique identification number assigned to a resident of a province. This number is used to store and retrieve all personal information, including their demographics, medication history, and eligibility for publicly funded health care. **NOTE:** In New Brunswick, this is called a Medicare Health Care Number. To maintain consistency, the Medicare Health Care Number will be referred to as PHN throughout this user guide.
Pharmacist ID	Pharmacist Identification number refers to the dispensing pharmacist's license number.
Pickup	In New Brunswick, Pickup messages are not supported.
Provider Registry (PR)	A comprehensive registry of prescriber records. All providers that are eligible to prescribe are included. This information can be reviewed by users that have access to the Provider Index in the NB Clinical Viewer. Currently, Propel Rx is not integrated with the PR.
RxID	In Propel Rx, this refers to the unique identifier assigned by the DIS for the prescription. This is not the same as the Propel Rx prescription number.
Synchronized	Synchronized means local patient information, including drug therapy, is synchronized with the information on the NB CR and DIS. When local patient demographics have been verified against the CR, this patient is referred to as EHR Sync'd in Propel Rx.

Establishing a Security Policy and Security Coordinator

Each pharmacy must ensure they have a security policy on file, as well as appoint a member of their team to be a "Security Coordinator."

The security policy on file (at a minimum) must include the following items:

- Acceptable use of computer resources by employees
- Password handling and security
- Computer terminal locking
- Handling of computer media
- Disposal of information assets, including media and storage devices
- Security incident management
- Patch management (how are upgrades performed)
- Change management
- Configuration management
- User enrolment and removal

The pharmacy manager or the Security Coordinator for the pharmacy should be responsible for ensuring positive identification of users prior to enrolment in Propel Rx or the DIS. The roles and responsibilities of the Security Coordinator shall include, but are not necessarily limited to:

- Primary liaison with the Department of Health (DH) for security related issues or topics.
- Immediate reporting of security breaches and incidents to the DH Security Officer and completion of Security Breach forms.
- Ensuring that the controls set forth in this document and future DH directives pertaining to DIS vendor implementation are completed as prescribed.
- Updating internal security policies and processes as required.
- Primary contact for security events pertaining to the vendor implementation of DIS.
- Providing guidance to staff on security issues pertaining to the implementation of DIS.
- Meeting with the designated DIS security counterpart on a semi-annual basis.
- Work with the DIS security counterpart when changes are made to the System Administrator's systems that may affect the overall security of DIS data or systems.

Managing User Accounts

Propel Rx supports role-based access control, allowing different users to have different levels of access depending on their job functions. For example, certain users can be authorized to view Prescriber Folders but not alter them. By mapping such access privileges to a small set of work-related roles, and then assigning users to those roles, the task of administering user privileges is considerably simplified. It also prevents security mistakes that might otherwise occur if each type of access or service had to be directly mapped to each user.

The **Security Administration Facility** window allows authorized users to add or remove users and customize existing user access options. All Propel Rx user accounts can be managed through this window, which is accessed through the **Security** button within the **More** (**...**) menu, or by logging into Propel Rx as the Administrator (ADM) user. The **Security Administration Facility** window has two tabs: Users and Role Types.

The ADM user, or a user with administrator security access, can assign one of the following access types to the various areas/reports listed for each user:

Access Type	Permissions
Full Access	User can view, modify, and edit the specified folder/window.
Read Only Access	User cannot modify or edit but can view the specified folder/window. In some instances, the user can modify their own settings only (e.g., Password, Narcotic Code).
No Access	User cannot view, modify, or edit the specified folder/window.

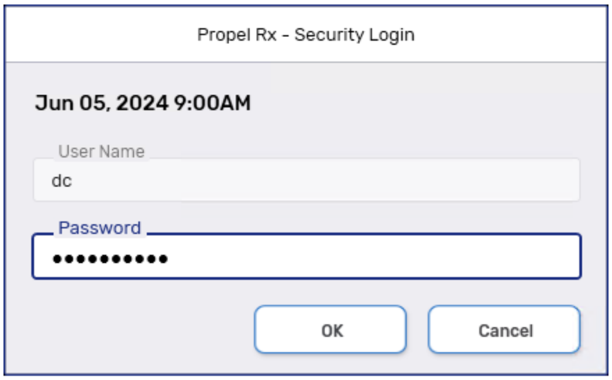
NOTE: For Reports Access, you can only select either Full Access or No Access. There is no Read Only Access for reports.

Upon upgrade to Propel Rx, all users have the same permissions and access they had prior to the upgrade. Any new users added after the Propel Rx upgrade have permissions based on their Role Type. User access for specific Role Types can be seen in the **Role Types** tab of the **Security Administration Facility** window.

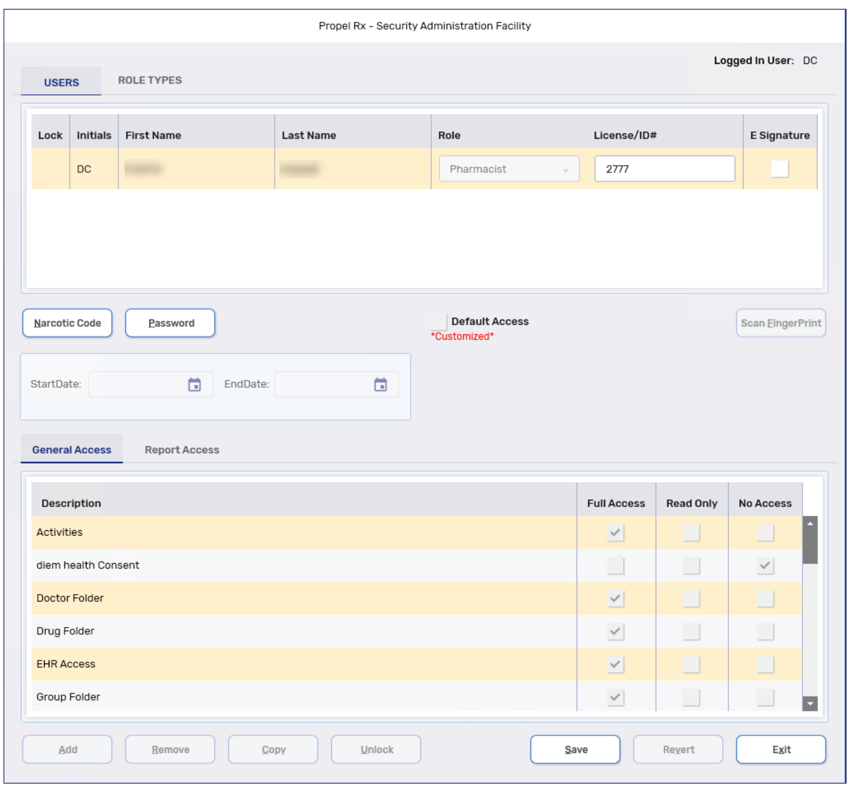
Accessing the Security Window

To access the Security Administration Facility window:

1. Log into Propel Rx. If you logged in as the Propel Rx Administrator (ADM), you may skip the remaining steps as the Security window opens automatically.
2. Select **More (...)** > **Security**. The Security Login window opens.
3. Enter your Propel Rx password.



4. Select **OK**. The Security Administration Facility window opens.



NOTE: A user must have Full Access to the Security Folder to manage all user accounts. The ADM or Pharmacy Manager user can assign this privilege to other users within Propel Rx.

Setting Up Users with DIS Access

All Propel Rx users must read the training document "**Collecting Client Information at the Pharmacies**," prior to being set up in Propel Rx as a user with access to DIS. This document outlines important information that users need to understand as it relates to interacting with the NB Client Registry (CR) and importance of accurate, complete patient records. Once the "**Collecting Client Information at the Pharmacies**" has been reviewed by the user, a Pharmacy Manager user or ADM can proceed to give the user DIS access.

NOTE: When a new pharmacy opens in NB, this document is provided by NB DIS. If needed, Pharmacy Managers can request this document from NBDIS@gnb.ca.

DIS access is granted by default to the following Role Types but can be removed if needed:

- Pharmacist
- Pharmacy Technician
- Pharmacy Assistant
- Pharmacy Manager
- Relief Pharmacist
- Pharmacy Student

For all other Role Types, DIS access is turned OFF and cannot be changed. When DIS access is not enabled, EHR-related buttons will be disabled, or the user will be prompted that an action requires EHR access.

To edit DIS access for a user:

1. Log into Propel Rx as the Administrator (User Name = ADM) or Pharmacy Manager.
2. If logged in as the Pharmacy Manager, complete the steps below. If logged in as ADM, skip to step 4.
   a. Select **More (...)** > **Security**. The Security Login window opens.
   b. Log in using the Propel Rx password. The Security Administration Facility window opens.
3. Highlight the appropriate user at the top.

   NOTE: You must ensure the pharmacist users have the correct license number entered in the **License/ID#** field. This will ensure the registered pharmacist user is able to successfully transmit transactions to the DIS.

4. Under the **General Access** tab, edit the **Full Access** checkbox for the **EHR Access** row.
5. Select **Save**.

Adding New Propel Rx Users

When adding new users, it is imperative that all user credentials are updated to reflect their role type and licensing ID. The ADM user cannot be used to process claims. Refer to the Pharmacy Board requirements as some interactions with the DIS cannot be performed by a pharmacy technician and must be performed by a pharmacist.

To add a new user:

1. Log into Propel Rx as the Administrator (User Name = ADM) or Pharmacy Manager.
2. If logged in as the Pharmacy Manager, complete the steps below. If logged in as ADM, skip to step 3.
    a. Select **More (...)** > **Security**. The Security Login window opens.
    b. Log in using the Propel Rx password. The Security Administration Facility window opens.
3. Select **Add**. The Add User window opens.
4. Enter the following information for the new user.
    - Initials
    - First Name
    - Last Name
    - Role Type
    - License/ID # (if applicable)
    - New Password (this is a temporary password for Propel Rx which is reset on the first login)
    - Confirm New
5. Select **OK**.
6. Select **Save**.
7. Select **Exit** to return to the login window.
8. Have the new user that was just created log in using the temporary password created above.
9. Upon login, the user is prompted to change their Propel Rx password. Select **OK** to open the Change Password window.
10. Enter a new password.
11. Select **OK**.

The steps outlined above adds the user to Propel Rx. By default, DIS access will be granted based on the user's assigned Role Type. For more information, see Setting Up Users with DIS Access.

DIS Audit Logging

A user's interactions with the DIS and CR are logged in the backend and can be retrieved at the request of your pharmacy or NB DIS. Information is kept for a period of 10 years, starting from the date the event occurred. **If NB DIS requires that your store provide audit data, please submit a request to Customer Care for this information**.

Language Preferences

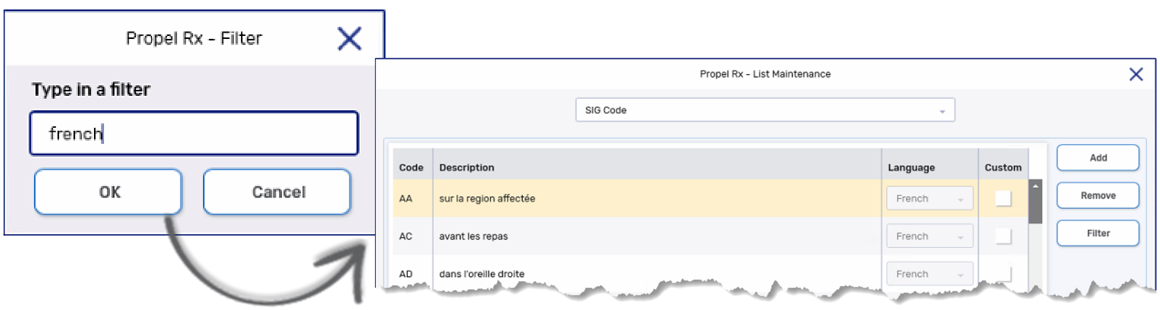
New Brunswick is an official bilingual province in Canada and as such, Propel Rx supports the ability to transmit French instructions to the DIS. The following French characters are supported in Propel Rx and the DIS:

à	ê	û	ç	Î	È
â	ë	ü	Ç	Ô	é
ä	î	É	è	Ü	À
Â	Ù	ù	Û	Ê	ô

Viewing SIG Language

To review the list of French SIG Codes:

1. Select **More** (...) > **List Maint**. The List Maintenance window opens.
2. From the dropdown, select **SIG Code**.
3. Select **Filter**. The Filter window opens.
4. Enter **French** and then select **OK**. All French SIG Codes appear.

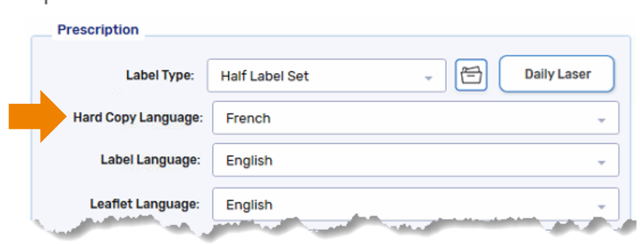


Setting Hard Copy Language

If you are using Half or Daily Laser labels, you can choose the language that the instructions will print on the hard copy.

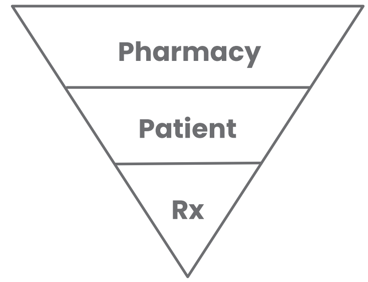
To modify your language preference for prescription hard copies:

1. Select **More** (...) > **Pharmacy**.
2. Select the **Rx Detail** tab.
3. From the **Hard Copy Language** dropdown field, select your language preference.
4. Select **Save**.



Setting Label Language

You can choose the language to print the instructions on the Half, Daily Laser, and Thermal vial labels. If you modify your label language to French, the French translation will be transmitted to the DIS, not English. This can be done at the pharmacy, patient, or prescription (Rx) level. The settings at lower levels supersede the settings of preceding levels, following a hierarchy.

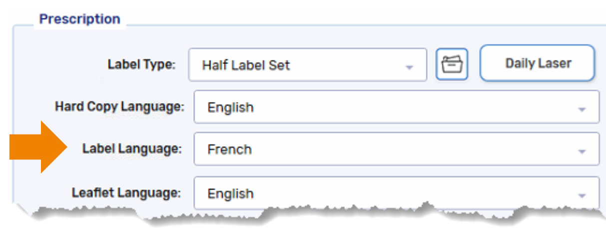


Setting Label Language in Pharmacy Preferences

When label language is set in Pharmacy Preferences, all new Patient Folders will inherit that setting. For existing patients, the label language preference will remain unchanged.

To set the default label language preference for vial labels:

1. Select **More (...)** > **Pharmacy**.
2. Select the **Rx Detail** tab.
3. From the **Label Language** dropdown field, select your language preference.
4. Select **Save**.



Setting Label Language in Patient Preferences

When label language is set in Patient Preferences, all prescriptions going forward for that patient will inherit that setting. However, you can still override the label language for a specific prescription if needed.

To set the label language preference for a patient:

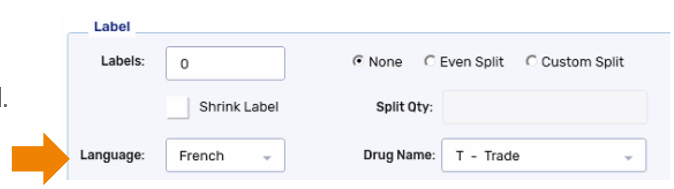
1. Open the **Patient Folder**.
2. Select the **Preferences** tab.
3. In the **Language** section, select your language preference from the **Label** dropdown.
4. Select **Save**.

Setting Label Language in Rx Detail

When label language is set in Rx Detail, it acts as the final override that determines what language is used for the vial label instructions. This means, even if the label language in Pharmacy Preferences and/or the Patient Folder is different than what's set in Rx Detail, the setting in Rx Detail will be respected.

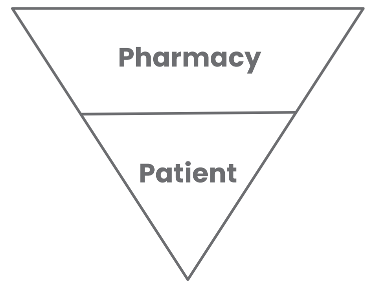
To set the label language preference for a prescription:

1. Process the prescription until it reaches **Rx Detail**.
2. Select the **Extended** tab.



3. In the **Label** section, select your language preference from the **Language** dropdown.
4. **Fill** the prescription as per usual process.

Setting Leaflet Language



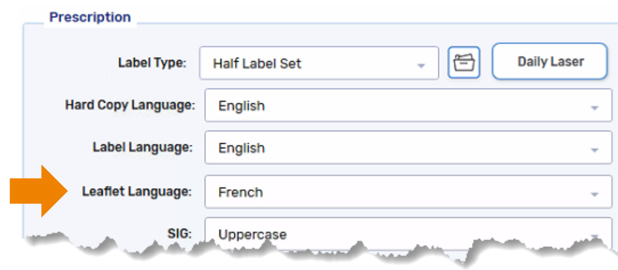
You can choose the language to print counselling leaflets for a drug. This can be done at the pharmacy, drug, or patient level. The settings at lower levels supersede the settings of preceding levels, following a hierarchy.

Setting Leaflet Language in Pharmacy Preferences

When leaflet language is set in Pharmacy Preferences, that language will be inherited by new Patient Folders. For existing patients, the leaflet language will remain unchanged.

To set the default leaflet language preference for counselling leaflets:

1. Select **More** (**...**) > **Pharmacy**.
2. Select the **Rx Detail** tab.
3. From the **Leaflet Language** dropdown field, select your leaflet language preference.
4. Select **Save**.

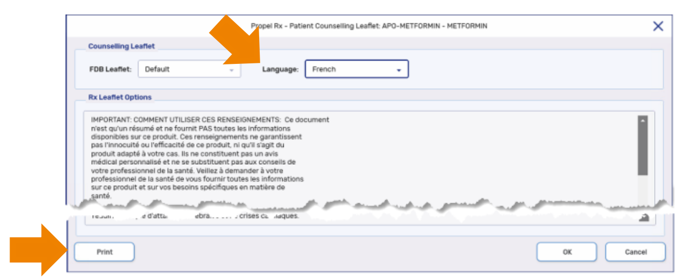


Setting Leaflet Language in the Drug Folder

When leaflet language is set in the Drug Folder, counselling leaflets can be manually printed in that chosen language. However, when a prescription is processed, the language for the counselling leaflet will follow the setting in the Patient Folder.

To manually print a counselling leaflet in a chosen language:

1. Open the **Drug Folder**.
2. Select the **Main** tab.
3. Select **Counsel**. The Patient Counselling Leaflet window opens.
4. From the **Language** dropdown field, select your language preference.
5. Select **Print**.



Setting Leaflet Language in Patient Preferences

When leaflet language is set in Patient Preferences, all counselling leaflets going forward for the patient's prescriptions will inherit that setting.

To set the leaflet language preference for a patient:

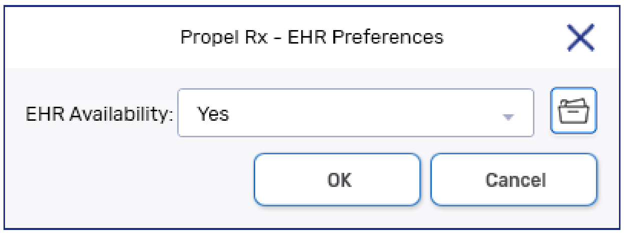
1. Open the **Patient Folder**.
2. Select the **Preferences** tab.
3. In the **Language** section, select your language preference from the **Leaflet** dropdown.
4. Select **Save**.

Setting EHR Preferences

Overview of EHR Preferences

To access EHR Preferences:

1. Select **More (...)** > **New Brunswick** > **EHR Preferences**. The EHR Preferences window opens.



What is the EHR Preference?	What is it used for?
EHR Availability	When the connection to the DIS is lost, or the Network is down for an extended period, the EHR Availability can be set to No. This automatically places DIS transactions in the EHR Queue for later processing (see EHR Queue for more information). An audit trail is created each time this preference is modified.

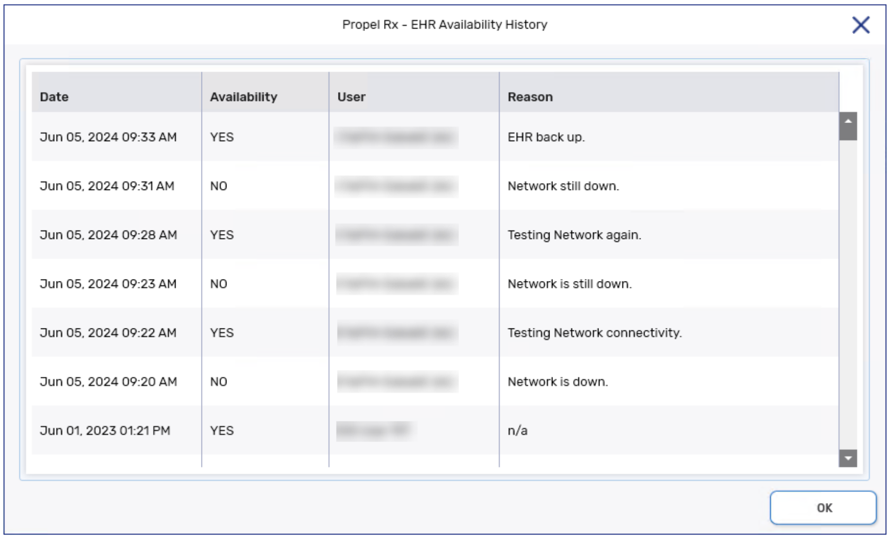
Viewing EHR Availability History

When the EHR Availability is changed, the following information is recorded in the EHR Availability History window:

- Date the change was made
- The setting that the EHR Availability was changed to (i.e., Yes or No)
- User who made the change
- Reason for the change

To view the change history:

1. Select **More (...)** > **New Brunswick** > **EHR Preferences**. The EHR Preferences window opens.
2. Select the folder button located beside the **EHR Availability** field. The EHR Availability History window opens.



Propel Rx - EHR Availability History

Date	Availability	User	Reason
Jun 05, 2024 09:33 AM	YES	[illegible]	EHR back up.
Jun 05, 2024 09:31 AM	NO	[illegible]	Network still down.
Jun 05, 2024 09:28 AM	YES	[illegible]	Testing Network again.
Jun 05, 2024 09:23 AM	NO	[illegible]	Network is still down.
Jun 05, 2024 09:22 AM	YES	[illegible]	Testing Network connectivity.
Jun 05, 2024 09:20 AM	NO	[illegible]	Network is down.
Jun 01, 2023 01:21 PM	YES	[illegible]	n/a

OK

3. Once you are done viewing the change history, select **OK**.

Pharmacy Preferences

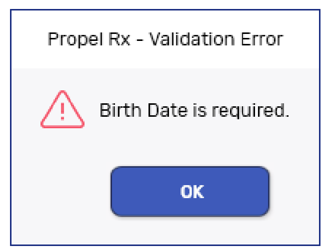
Idle Time (Min.)

A session timeout of 20 minutes has been defaulted for Propel Rx to conform with security requirements set out by New Brunswick DIS. If a user has not been active in Propel Rx for 20 minutes, they are automatically logged out and will have to log back in. The CPS (for claim adjudication) and PHS (for Half label prescription printing) applications will remain open. This is controlled by the **Idle Time (Min.)** preference.

- Activity is measured per session. If multiple sessions are open, the user will be logged out of one session after 20 minutes of inactivity even if another session is active.
- Activity within Propel Rx Reports is not counted as activity within Propel Rx. If a user is active in Propel Rx Reports but had no activity in Propel Rx for 20 minutes, they will be logged out of Propel Rx.

Required Patient Fields

In Pharmacy Preferences, required demographic fields for a Patient Folder are specified. When a Patient Folder is saved, Propel Rx validates for missing data and prompts you if required fields are not completed.



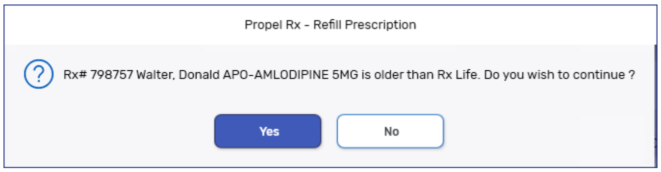
To ensure Patient Folders are complete, the **Birth Date**, **Phone Number**, **City,** and **Postal Code** checkboxes in **More** (...) > **Pharmacy** > **Required Patient Fields** are selected by default and disabled. When messages are sent to the Client Registry (CR) and DIS, these fields are used to validate the patient.

Background IVR, Auto Refill, Web Refill

If **Background IVR, Auto Refill, and Web Refill** is enabled in **More** (...) > **Pharmacy**, IVR, Auto Refill, and Web Refill prescriptions will auto-process once received in Propel Rx. However, if the request came in after hours when no user is logged into Propel Rx, the prescription would remain in Data Entry. Once a user logs into Propel Rx, the prescription will be auto-processed using their credentials. If any Detected Issues are returned by the DIS, the issues will need to be addressed and the prescription manually processed. This also applies to prescriptions processed for synchronized patients using the **Background** button in the **Rx** menu.

Rx Life Expiry Date and Default Rx Expiry Days

A prescription's Rx Life is calculated based on the Rx Life Expiry Date and Default Rx Expiry Days preferences in **More** (...) > **Pharmacy** > **Rx Detail**. If a prescription has passed its Rx Life Expiry Date, a prompt appears when you attempt to refill it. You can continue reauthorizing the prescription by selecting **Yes** and the QA will default to 0 in Rx Detail.



In New Brunswick, as prescriptions are valid for one year from when they were written, the following Pharmacy Preferences are defaulted and disabled:

- **Rx Life Expiry Date** is set to Written Rx Date.
- **Default Rx Expiry Days** for Regular and Narcotic/Benzodiazepine prescriptions is set to 365.

Searching for and Synchronizing a Patient

New Brunswick pharmacies must thoroughly search the Client Registry (CR), aiming to find the patient if they exist. A matching record will display if the patient has other records contributed to the CR by another source(s) (sources include Medicare, Vital Stats, Hospitals, Public Health Information System (PHIS), DIS records from other community pharmacies, etc.). Finding a matching patient and synchronizing your pharmacy record to the existing patient in CR, ensures that dispense information submitted to DIS will then be included in the patient's longitudinal health record (EHR).

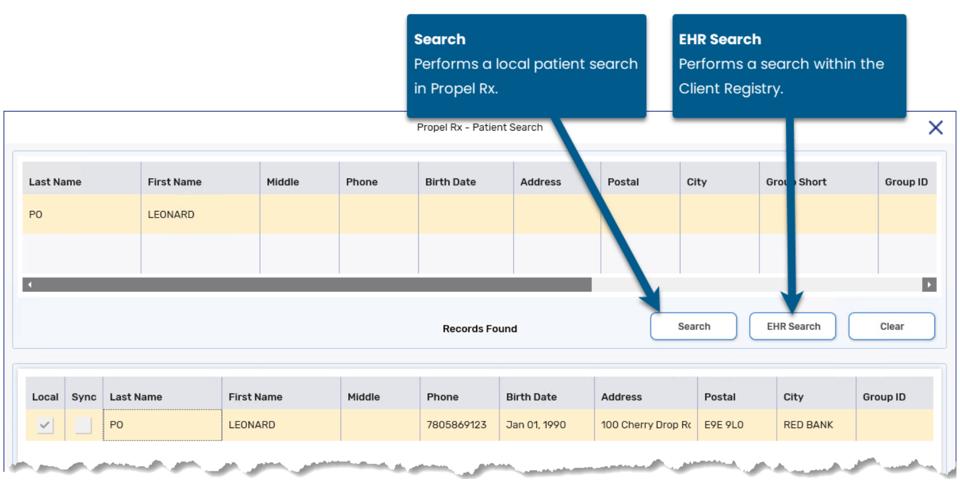
Patient Search Window

You have 2 search options when searching for a patient: a local search or a CR search. In the Patient Search window:

- The **Search** button completes a local search within Propel Rx. Only local data will be returned in the search results. This is the default search that's performed when the Enter key is pressed in the Search window.
- The **EHR Search** button performs a search within the Client Registry. Only CR data will be returned in the search results. A maximum of 49 results can be displayed. If more than 49 results are returned, a prompt will indicate that the search criteria should be refined. A local search must be performed first before the EHR Search button becomes enabled.

When pharmacies try to search for a patient, there are 4 possible scenarios they may encounter. For each scenario, it is important to ensure that the Patient Folder is synchronized with the patient information in the CR. For more information, see Synchronization.

From the Patient Search window, Propel Rx users can identify which patients are synchronized by reviewing the **Sync** checkbox. The sample patient below is a local patient that has not been synchronized with the CR.



Search Criteria

When searching for a patient, the more data you provide, the better (more accurate) your results will be.

A local search within Propel Rx can be done using any search criteria, as per existing functionality.

A search within the CR must contain one of the following search combinations:

- ***RECOMMENDED*** Provincial Health Number (PHN) and PHN Code
- Last Name and Date of Birth
- Last Name and Phone Number
- Last Name and Postal Code
- Phone Number

TIP: When using the Postal Code to search the CR, you can search in the following formats: E3E 3E3 (with a space) and E3E3E3 (without a space).

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SEARCHING THE EHR USING THE PATIENT'S NAME

The First Name is optional when performing a search within the CR but including it with the Last Name will yield better search results.

PHN Code

The **PHN Code** is a field that can be specified to search for a patient locally or in the CR. The PHN Code indicates the type of PHN the patient has (e.g., NB Medicare, NS PHN, Other PHN, etc.). When searching the CR, entering the PHN, and selecting the PHN Code is highly recommended as it narrows your search results. For more information, see PHN Code.

Name

A name search in the CR searches all name fields, even if specified in the wrong field. This way, if you are unable to determine which is a first or last name, or if it was previously entered incorrectly, a search of Scott Peter will return Peter Scott as well.

Name searching in the CR is also based on a phonetic algorithm, allowing you to search for names that are not an exact match but sound the same. Phonetic matching capabilities allow names like "John" and "Jon" to be returned. In addition, you can search by nickname as a table supports the mapping of names and nicknames. See the examples below.

- "Bob" can be mapped to "Robert."
- "Abby" can be mapped to "Abigail."
- "Jonathon" can be mapped to "John."

Punctation

For all name fields, the punctuation that is accepted when adding, updating, or searching for an EHR patient record are listed in the following table.

Punctuation	Example
Capital Letters	LEE
Hyphen [-]	MARY-ANN or COTTON-WILLIAMS
Prefix	SIR ALEXANDER
Suffix	DANIEL SR
Apostrophe [’]	O’REILLY
Period [.]	ST. CLARE

NOTE: Wildcard characters are not accepted for CR searches (e.g., * % $).

Patient Copy

The Patient Copy function located in the Patient Search window is only available when the patient is local, as indicated by the Local checkbox. When you select the **Copy** button, the patient’s demographic information will be copied to a new, unsynchronized Patient Folder. You must **Save** the Patient Folder and proceed to synchronize the patient as outlined in Synchronization Scenarios. This is imperative as prescriptions cannot be filled for an unsynchronized patient unless they have a non-EHR patient status. For more information, see Copying an Existing Patient.

CREATING PATIENT FOLDERS FOR PATIENTS THAT EXIST IN THE CR

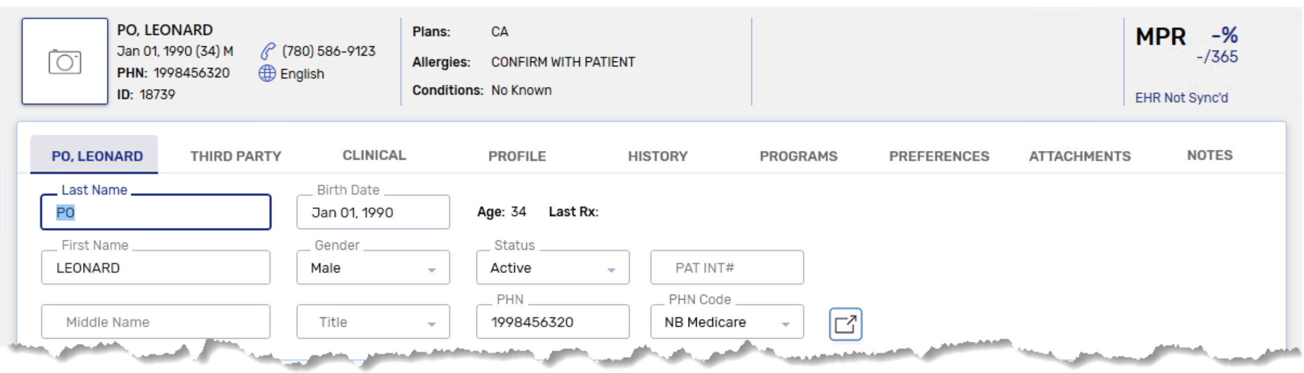
With DIS and CR integration, it may be faster to look for the patient in the CR and copy the demographic information into Propel Rx via Patient Compare, rather than performing a Patient Copy.

Synchronization

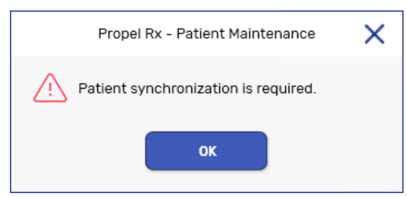
For any interaction to occur with the DIS, a patient's information in Propel Rx must be synchronized with the CR. Synchronization ensures that the correct patient is selected and allows their prescription dispense information to be updated on the EHR. For information on how to synchronize a patient, see Synchronization Scenarios.

In the top right section of the Patient Folder Main tab, below the patient's MPR, is an indication of the Patient Folder's synchronization status with the CR.

- If the Patient Folder is not yet synchronized, it displays **EHR Not Sync'd**.
- If the Patient Folder has been synchronized, it displays **EHR Sync MMM DD, YYYY**.
- If the Patient has been nullified, it displays **EHR Nullified**.
- If the Patient Folder is flagged as Facility, it displays **Facility Patient**.



It is imperative that every Patient Folder is synchronized prior to any interaction with the DIS. If a user attempts to transmit information to the DIS for a patient that has not been synchronized (i.e., fill a prescription), a prompt appears.



Upon patient synchronization, the following patient fields are transmitted to the CR.

- Last Name
- First Name
- Middle Name
- Birth Date
- Gender
- PHN and PHN Code
- Address Line 1
- City
- Postal Code
- Phone
- Country

NOTE: Any phone number extension entered in the Ext field is not transmitted to the CR.

If demographic information is updated for a synced patient in the Patient Folder Main tab, the changes are transmitted to the CR upon **Save**. The EHR Sync Date at the top is also updated to reflect the date that the changes took place.

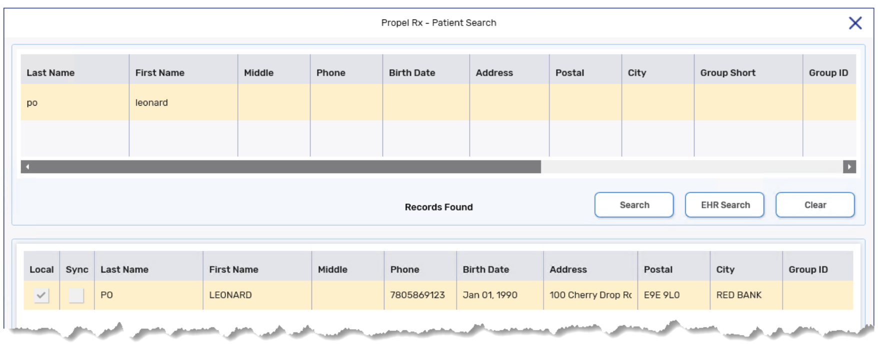
Synchronization Scenarios

When pharmacies try to search for a patient, there are 4 possible scenarios they may encounter. For each scenario, it is important that the Patient Folder is synchronized with the patient information in the CR.

Scenario 1: Existing Propel Rx Patient/Existing Client Registry Patient

You will encounter this scenario if the patient is an existing customer at your pharmacy and exists in the CR.

1. Select the **Patient** button on the left navigation menu. The Patient Search window opens.
2. Enter the search criteria for the patient.
3. Select **Search**. The search results display matching local results.
4. Highlight the local patient record.



5. Select **OK**. The Patient Folder opens.
6. On the Main tab, select the **PHN Expander** button. The Patient Search – EHR window opens with the local patient information as the search criteria.
7. Highlight the matching result that displays.
8. Select **Compare**. The Patient Comparison window opens displaying the Local (Propel Rx) patient information and the CR information.
9. Confirm the patient selected from the CR matches the local record.
10. If required, information from the CR can be saved locally by highlighting the applicable field(s) on the EHR side and selecting **Copy**. For more information, see Patient Compare.

NOTE: You cannot copy patient information from Propel Rx to the CR at this point. The patient must be synced first to update their information on the CR.

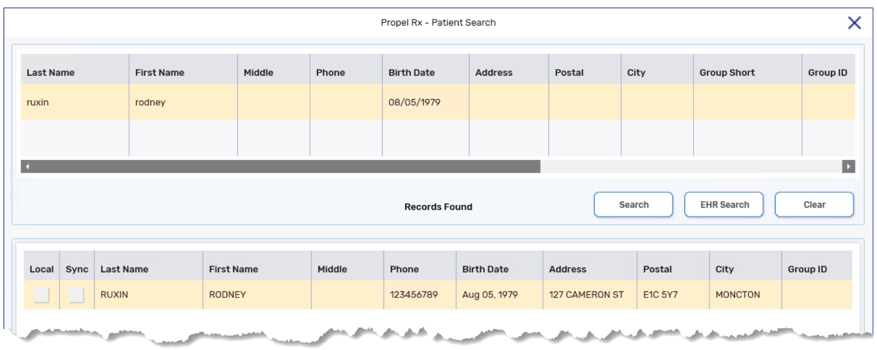
11. Select **Update**. Propel Rx synchronizes the local record. The Patient Folder information bar is updated to indicate the Patient Folder was synced to the CR and the date it occurred.
12. On the Patient Folder Main tab, Ensure the **PHN** and **PHN Code** are populated correctly.
13. Select **Save**.

Scenario 2: New Propel Rx Patient/Existing Client Registry Patient

You will encounter this scenario if this is the first time the patient has come to your pharmacy, but not the first time they have received health care treatment from a New Brunswick CR integrated environment. This scenario will be used for a patient that exists in the CR.

1. Select the **Patient** button on the left navigation menu. The Patient Search window opens.
2. Enter the [search criteria](#) for the patient.
3. Select **Search**. The search results indicate *No Records Found*, or the results returned do not match the patient.
4. Select **EHR Search**. The search results display existing EHR records.
5. Highlight the matching EHR patient record.

> **NOTE:** The **Local** and **Sync** checkboxes will be deselected, as shown with the highlighted record below.



6. Select **OK**. A prompt appears asking if a new patient should be created.
7. Select **Yes**. The Patient Folder is populated with the demographic information from the CR.
8. If required, update any information in the Patient Folder, including the **PHN** and **PHN Code** in the **Main** tab.
9. Select **Save**.

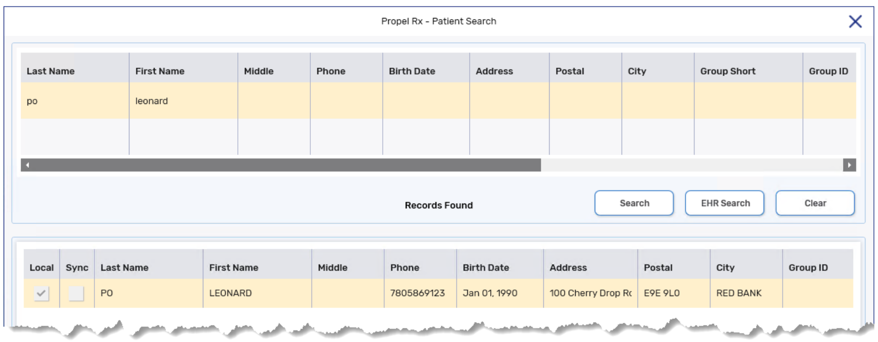
The Patient Folder is saved locally. The Patient Folder information bar is updated to indicate the Patient Folder was synced to the CR and the date it occurred.

Scenario 3: Existing Propel Rx Patient/New Client Registry Patient

You will encounter this scenario if the patient is an existing customer at your pharmacy and is not currently in the CR.

1. Select the **Patient** button on the left navigation menu. The Patient Search window opens.
2. Enter the search criteria for the patient.
3. Select **Search**. The search results display a local, non-synchronized record.
4. Highlight the local patient record.

NOTE: The **Sync** checkbox will be deselected, as shown with the highlighted record below.



5. Select **OK**. The Patient Folder opens.
6. On the Main tab, select the **PHN Expander** button. The Patient Search – EHR window opens with the local patient information as the search criteria.
7. Once the search is complete, select **Synchronize**. The Add Person message is sent to the CR. Once the transmission is successful, the Patient Folder information bar is updated to indicate the Patient Folder was synced to the CR and the date it occurred.

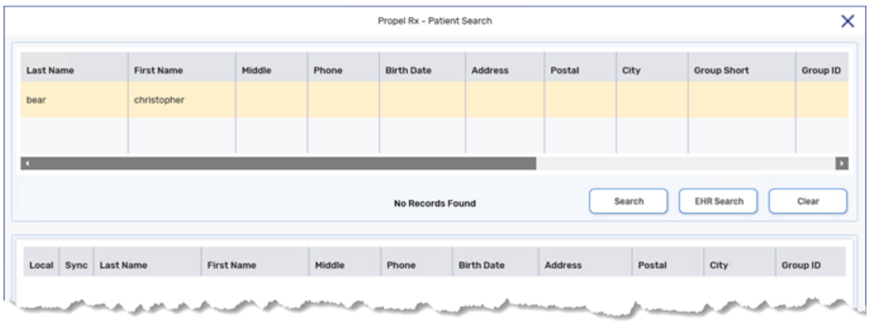
ALERT: Before adding a new patient to the CR, it is imperative that you exhaust all search options to validate that the patient does not already exist in the CR.

8. On the Patient Folder Main tab, ensure the **PHN** and **PHN Code** are populated correctly.
9. Select **Save**.

Scenario 4: New Propel Rx Patient/New Client Registry Patient

You will encounter this scenario if this is the first time the patient has come to your pharmacy and the first time they have received health care treatment from a New Brunswick CR integrated environment. All New Brunswick residents with a Medicare number will exist in the CR. This scenario will be used mostly when a patient is from out of province.

1. Select the **Patient** button on the left navigation menu. The Patient Search window opens.
2. Enter the search criteria for the patient.
3. Select **Search**. The search results indicate *No Records Found*, or the results returned do not match the patient.
4. Select **EHR Search**. The search results indicate *No Records Found*, or the results returned do not match the patient.



5. Select **New**. The Patient Folder opens.

ALERT: Before adding a new patient to the EHR, it is imperative that you exhaust all search options to validate that the patient does not already exist in the CR.

6. Enter all related demographic information for the new patient, including the **PHN** and **PHN Code** in the **Main** tab.
7. Select **Save**.
8. On the Main tab, select the **PHN Expander** button. The Patient Search – EHR window opens with the local patient information as the search criteria.

NOTE: If the Patient Folder was just created, it must be saved before the PHN Expander button is enabled.

9. Once the search is complete, select **Synchronize**. The Add Person message is sent to the CR. Once the transmission is successful, the Patient Folder information bar is updated to indicate the Patient Folder was synced to the CR and the date it occurred.
10. Select **Save**.

Synchronizing the Wrong Patient

If your pharmacy selects the wrong patient during the synchronization process, you must contact NB DIS by calling the Service New Brunswick Help Desk at **1-888-250-5250** and requesting a call back. NB DIS will reach out to assist by reviewing the patient records, demographic details, and prescription information together. This will ensure that each patient record involved ends up separated and contains accurate information.

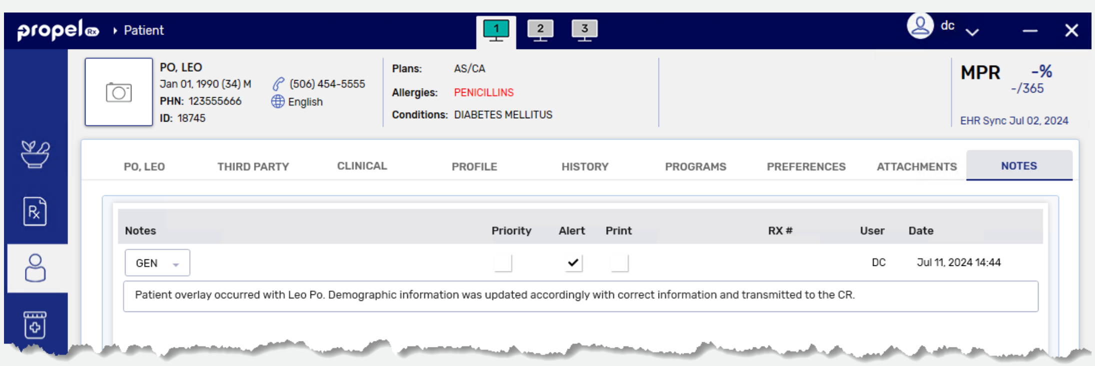
NOTE: A patient overlay occurs when you overwrite most or all the local patient's information with the wrong patient's information on the CR. When this occurs, the patient record will be locked on the CR and updates will not be permitted until the issue is resolved.

ALERT: Personal Health Information (PHI) should never be included in an email or phone call to the Service Desk. Only the context of the problem being encountered should be referenced, not the specific patient data. The DIS team will follow up with your pharmacy via a phone call and request patient information then.

If the DIS team is unavailable and you need to dispense a prescription, create a new Patient Folder, and sync it to the correct record in the CR. After NB DIS contacts your pharmacy and the issue is resolved, you can then merge the Patient Folders together.

DOCUMENTING A PATIENT OVERLAY

After a patient overlay has been corrected, document the details in the Patient Folder Notes tab. This will ensure your pharmacy has accurate documentation for future reference should this come up during an audit.



Patient Nullify

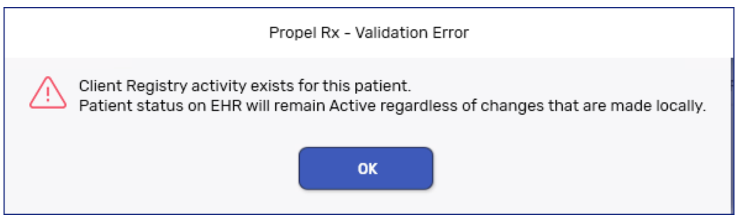
NB DIS permits you to nullify synchronized patient records submitted by your pharmacy. Nullifying a patient means that the Patient Folder was synchronized with the CR in error. A nullify is only permitted when the Patient Folder has had no activity with the DIS.

Nullifying a patient will not be permitted if either of the following are true:

- The Patient Folder has never been synchronized.
- Active prescriptions for the patient exist in the DIS.

If you attempt to nullify a patient that has prescriptions submitted to the DIS on their Profile, a validation error will appear, and the patient record will not be nullified. The Patient Folder information bar will still indicate **EHR Sync'd**. Locally, the patient status may change depending on how you initiated the nullify process.

- If you attempted to change an EHR patient status to Inactive, the patient's status is updated to Inactive locally, and a row is added to Patient History.
- If you attempted to change an Active patient status to Animal, the patient's local status remains as Active.



Nullifying a Patient

Propel Rx initiates the patient nullify process when:

- An **EHR patient status** is changed to **Inactive**.
- An **Active** patient status is changed to **Animal**.

NOTE: If the patient has dispenses on their Propel Rx Profile, you must cancel all of them before you can initiate a nullify.

To nullify a patient:

1. Open the **Patient Folder**.
2. In the **Main** tab, dropdown the **Status** field and select Inactive, or if the patient is an animal, select Animal.
3. Select **Save**. A nullify message is transmitted to the DIS. If successful, the following updates are made:
    - **EHR Nullified** appears in the Patient Folder information bar.

- The **PHN** expander button is disabled.
- The patient status is updated to **Inactive** or **Animal**.
- A **Patient History** row is added.

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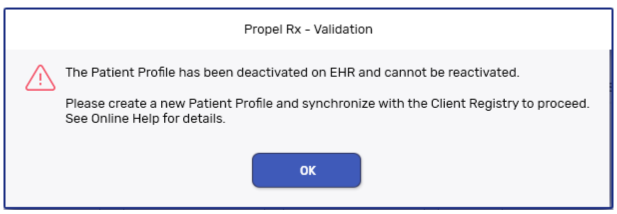
DOCUMENTING A PATIENT NULLIFY

If a patient was added to the CR in error, document this by adding a note in the Patient Folder Notes tab for future reference.

Reactivating a Nullified Patient

If a patient was previously nullified and you attempt to change their status to Active, the following prompt displays.



NOTE: You cannot reactivate a nullified patient.

If the patient status was updated from an **EHR patient status** to **Inactive**, you must create a new Patient Folder to fill prescriptions for them. To reduce confusion of which Patient Folder to use, the nullified Patient Folder can be merged with the new Patient Folder. For more information, see Merging Patients.

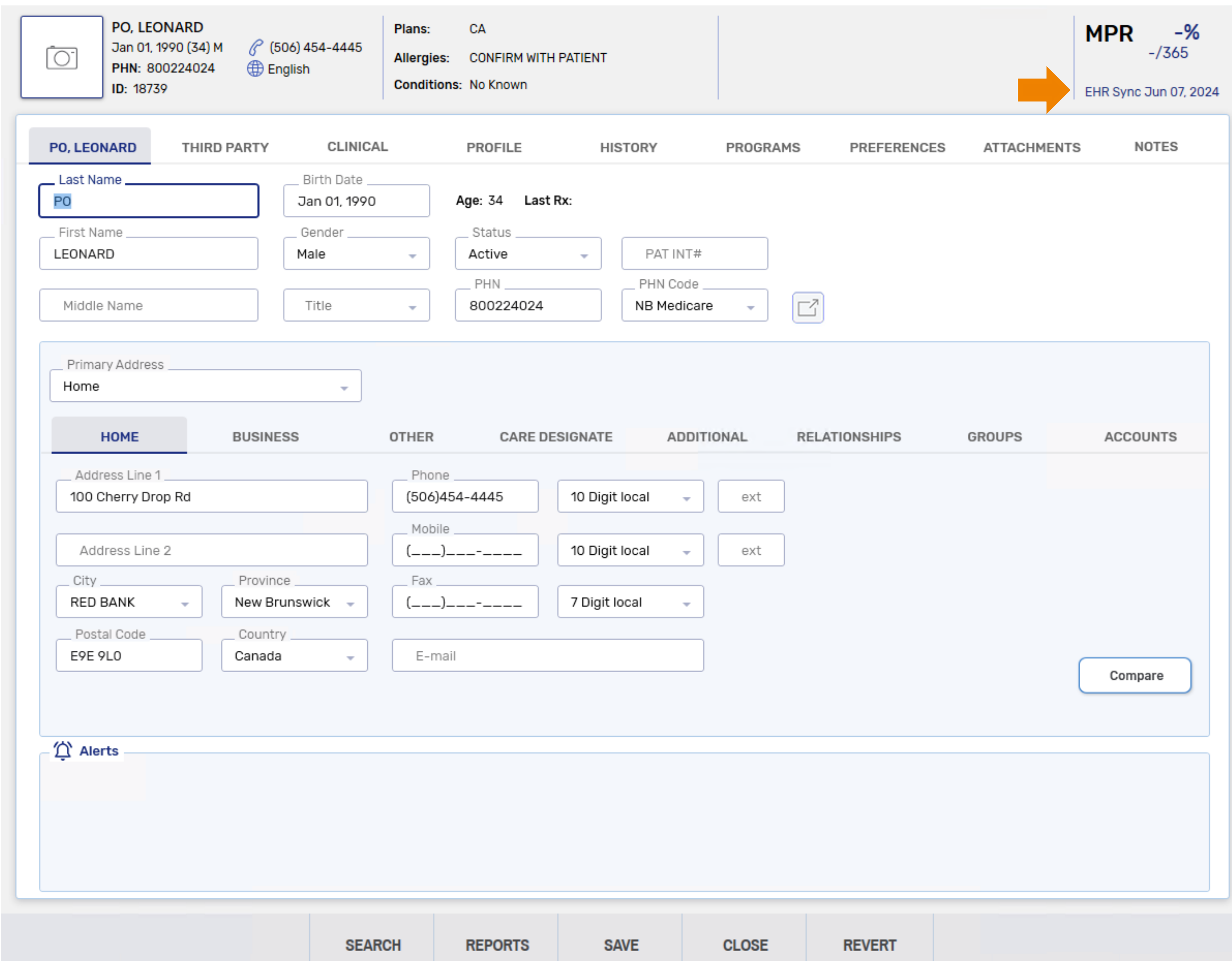
If the patient status was updated from **Active** to **Animal**, you can continue to use the Patient Folder to fill prescriptions.

Patient Folder

Main Tab

Synchronization Indicator

An EHR Sync indicator displays on the information bar at the top of the Patient Folder and in the Intake window. For more information on the different indicators, click here.

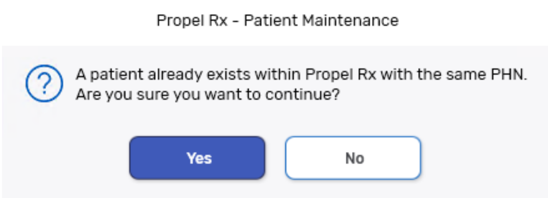
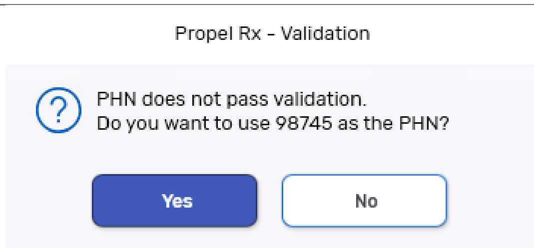
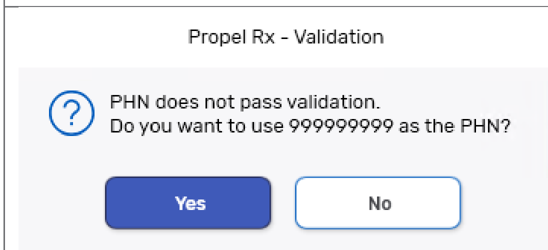


Once the patient has been synchronized, the PHN expander button will be disabled. You can select **Compare** to validate the local information with the information in the CR if needed.

PHN

The Personal Health Number (PHN) is a unique identification number assigned to a resident of a province. In New Brunswick, this is called the Medicare Health Care Number (HCN), however, to maintain consistency, Medicare HCN is referred to as PHN throughout this user guide. When a patient is from out of province, their PHN is used along with a code identifying the province or territory they originate from (PHN Code).

The PHN field is mandatory if a PHN Code is entered. The following validations are also performed when a PHN is entered in the Patient Folder PHN field.

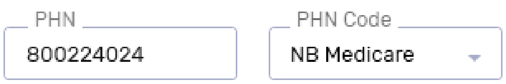
PHN Validation	Description
	The PHN is a unique identifier assigned to every patient. If the PHN field is populated with a PHN that already exists for another local patient in Propel Rx, this validation appears upon selecting **Save**. The only time a patient with the same PHN is saved locally is when a newborn is added using their mother's PHN. Once the newborn acquires their own PHN, you must update the record.
	In New Brunswick, the PHN is 9 digits. If a 9-digit number is not populated in the PHN field, this prompt appears upon selecting **Save**. Do not enter SPACES in the PHN field. If a patient has an Out of Province status or their province specified in the Patient Folder is not New Brunswick, this validation does not occur. This prompt only appears once. Upon making your selection, this prompt will no longer appear for all future encounters with this Patient Folder.
	If the PHN is made of all the same numbers, this prompt appears upon selecting **Save**. This prompt only appears once. Upon making your selection, this prompt will no longer appear for all future encounters with this Patient Folder.

PHN Code

The PHN Code indicates the type of PHN your patient has (e.g., NB Medicare, NS PHN, Other, etc.). This field is mandatory if a PHN is entered. If required, this field can be updated in Propel Rx. For example, a patient used to live out of province but now lives in New Brunswick with a New Brunswick Medicare number; therefore, the PHN Code should be modified to NB Medicare.

To modify a patient's PHN Code:

1. Open the **Patient Folder**.
2. On the **Main** tab, dropdown the **PHN Code** field and select the appropriate type based on the patient's PHN. The default is NB Medicare.

3. Select **Save**.

Patient Compare

The Compare button allows you to compare the patient information in Propel Rx and the patient information in the CR. If any of the information does not match, or something is missing, a user can update information in the CR, as well as apply CR information locally into Propel Rx.

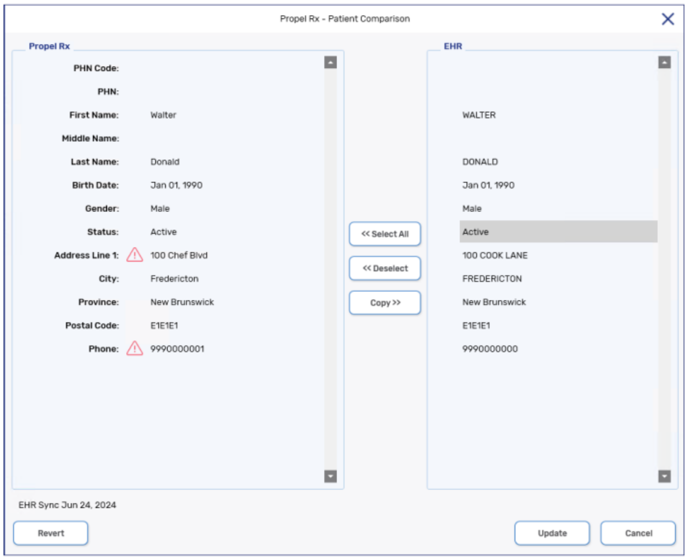
NOTE: When demographic information is updated in the Patient Folder Main tab, the information is transmitted to the CR automatically upon selecting **Save**.

To compare the Patient Folder with the CR:

1. In the **Patient Folder Main** tab, do one of the following:
   - If the patient is synchronized, select the **Compare** button located at the bottom.
   - If the patient is unsynchronized, select the expander button beside the **PHN** field. A search in the CR is performed. If a search result is returned that matches the patient, highlight the record, and then select **Compare**.

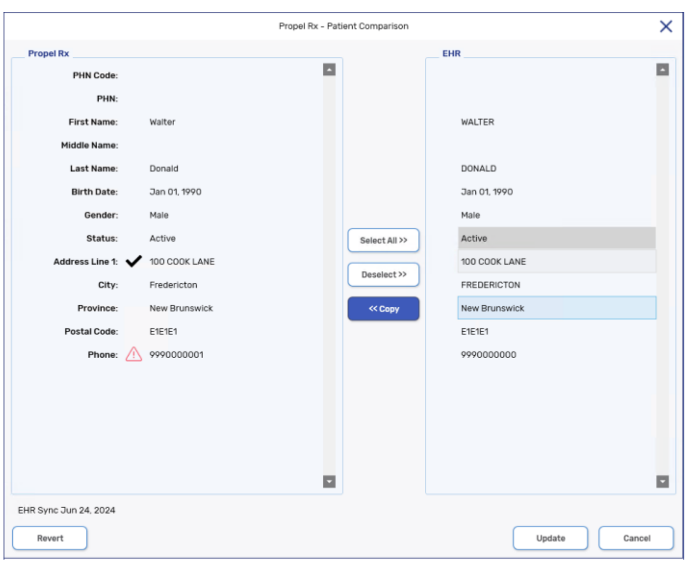
     NOTE: If the Patient Folder was just created, it must be saved before the PHN Expander button is enabled.

   The Patient Comparison window opens displaying the local (Propel Rx) patient information and the CR information.
2. Review the information on both sides. If there are any differences between the left (Propel Rx) and right (CR) sides, a warning indicator ⚠ appears beside the field on the left. Mismatches are not case sensitive.



3. If you want to copy patient information, do one of the following:
    - Select one or more fields to copy on the desired side. You can only update information in one direction per transaction. Once a row is highlighted on one side, any highlighted rows on the other side become automatically deselected.
    - Select the **Select All** button to highlight all fields on the desired side. The direction of the arrow indicates which side the information is being copied from.
    - If the Compare window was opened through the PHN Expander button, you can only update information from the CR to Propel Rx.
4. Select **Copy**. Once information is copied over, a checkmark appears beside the field that was updated.

TIP: If you copied information over in error, select **Revert**. This will return the Patient Comparison window to its original state when it was opened.



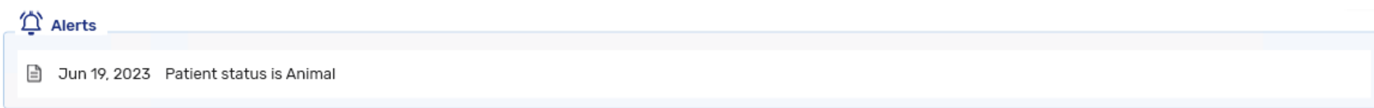
4. Select **Update**. The demographic information is updated in Propel Rx or transmitted to the CR. A new EHR sync date is displayed in the Patient Folder Main tab and Patient Comparison window.
5. Select **Save**.

Patient Status

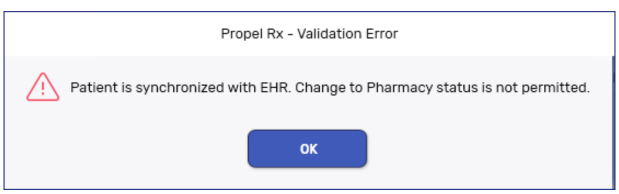
In New Brunswick, when the patient status is Active, Deceased, Hospitalized, Obsolete, Out of Province, or Inactive (but not nullified):

- Messages transmit to the CR
- EHR buttons are enabled

Animal, Doctor Office, Pharmacy, Caregiver, and Facility patients are not associated with EHR functionality; these patients are not synced to the CR. When dispensing a prescription for an Animal, Doctor Office, or Pharmacy, Rx Detail displays an alert to ensure the dispensing user is aware of the patient status.



When the patient status is updated, the change is recorded in the Patient Folder History tab. The status of a patient however cannot be updated to a non-EHR status if any active prescriptions exist for the patient on the DIS; a validation prompt will display.

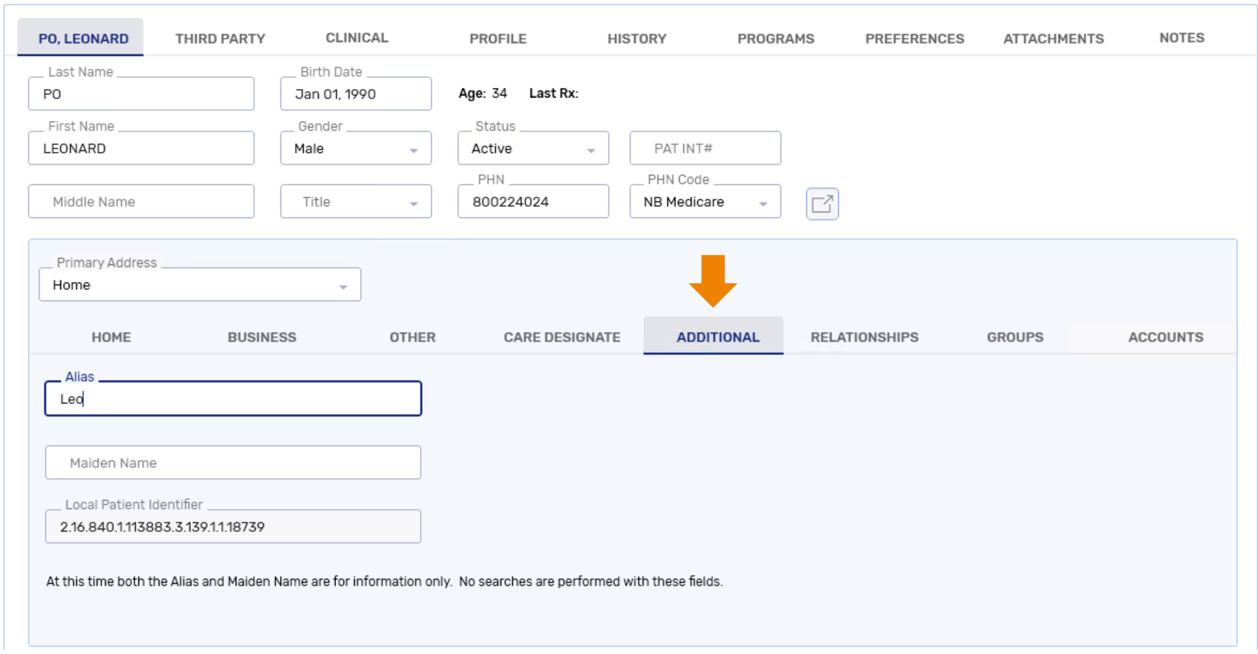


If you synchronized a non-human patient to the CR in error, such as in the case of an animal or doctor's office, you can nullify the patient. To do this, you must refuse all prescriptions for the patient in Propel Rx and then change their status to Inactive or Animal. For more information, see Patient Nullify.

ALERT: Do not use non-EHR patient statuses to bypass transmitting prescriptions to the DIS. All prescriptions must be transmitted to the DIS and any prescriptions that are not may be monitored or audited. Refer to DIS Network is Unavailable for how to manage transactions when the DIS is not available.

Additional Sub-Tab

In the Patient Folder Main tab, an Additional sub-tab is available.



This tab contains the following information:

Alias	Use this field to enter any alias names your patient may go by (e.g., patient's first name is Robert but goes by Bob). This field is for informational purposes only; any information entered in this field is not transmitted to/from the CR and does not appear anywhere (e.g., reports, labels, etc.). Furthermore, no searches are performed in the CR using this field.
Maiden Name	Use this field to enter a patient's maiden name. This field is for informational purposes only; any information entered in this field is not transmitted to the CR and does not appear anywhere (e.g., reports, labels, etc.). Furthermore, no searches are performed in the CR using this field.
Local Patient Identifier	This field is for informational purposes only. When troubleshooting with NB DIS, this number may be required.

Patient Clinical Tab

The Clinical tab contains observations, clinical information (i.e., allergies, intolerances), and clinical history (i.e., consultations) for the patient. Information in the Clinical tab is not transmitted to the patient's DIS Profile, but it is imperative that you keep this information up-to-date.

Patient Profile Tab

A patient's local profile is displayed in the Patient Folder Profile tab. This only displays records that are found locally in Propel Rx. The ability to view a patient's DIS Profile from Propel Rx is not supported in New Brunswick. You can view the patient's DIS Profile from the NB Clinical Viewer.

NOTE: The Profile button in the Rx menu is not enabled in New Brunswick. The patient's local profile cannot be accessed from this location.

Patient History Tab

A patient's care history lists all events that have occurred using the Patient Folder. Events include modifications to the Patient Folder (e.g., adding notes) and prescription activities (e.g., filling, cancelling, or transferring a prescription).

For each event, the date, user, type of activity, and comments are displayed as a separate row in the History tab. By default, 1 years' worth of records are displayed. To view all History records, select the **Show All** checkbox.

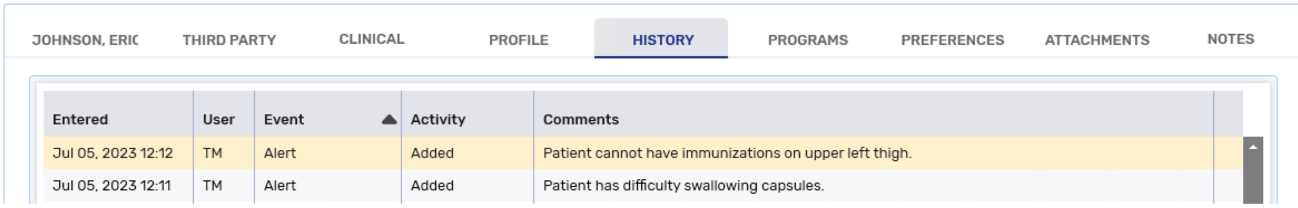
For example, the image below displays the logging for events related to the CR and DIS.

Entered	User	Event	Activity	Comments
Jun 27, 2024 18:42	PRE	Patient Merge	Merged	ID: 65036; Patient, Logging; Jan 02, 1903 MERGED TO ID: 10007; Test, Patient; Jan 01, 1990
Jun 27, 2024 18:39	PRE	Patient Status	Changed	Old Value: Active, New Value: Inactive
Jun 27, 2024 18:39	PRE	EHR - Patient	Nullified	Patient Nullified.
Jun 27, 2024 18:39	PRE	EHR - Patient	Update Patient	Patient Updated.
Jun 27, 2024 18:38	PRE	EHR - Patient	Compare Patient	Patient Compare performed.
Jun 27, 2024 18:38	PRE	EHR - Patient	Compare Patient	Patient Compare performed.
Jun 27, 2024 18:38	PRE	EHR - Patient	Update Patient	Patient Updated.
Jun 27, 2024 18:37	PRE	EHR - Patient	Synchronized	Patient has been synchronized.

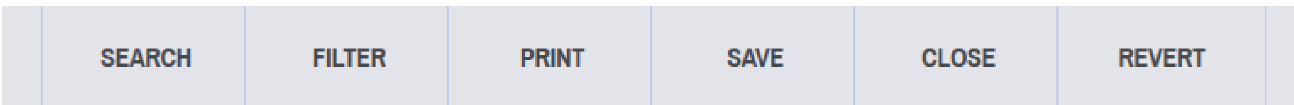
ALERT: It is imperative that users log into Propel Rx with their own credentials and do not share their passwords. All activity sent to the CR and DIS is done so with a user attached.

For certain events recorded in the History tab, such as a dispense or a form, you can highlight the record and then select **Detail** to view more information about what occurred in the event. Furthermore, you can use the action buttons along the bottom to sort and filter the entries in the History tab. Please note, some events cannot be detailed.

- To sort entries, select the header for the column you want to sort by. In the example below, the records are sorted in ascending alphabetical order by Event.



- To filter entries, select Filter and enter the desired text to filter by.



Patient Notes Tab

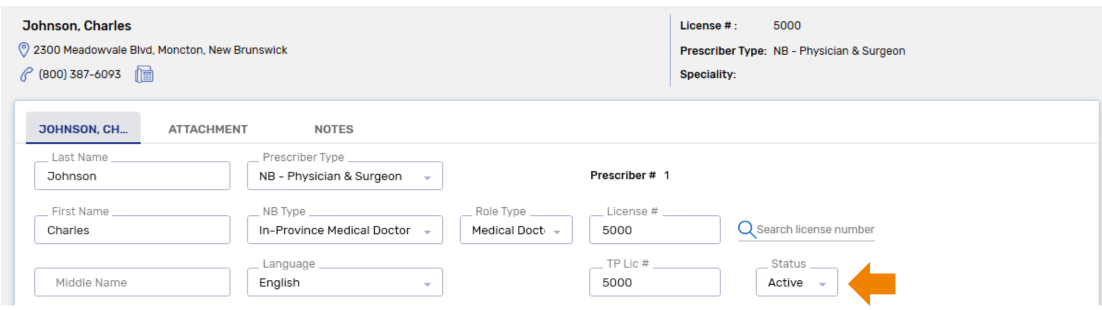
Any notes added in the Patient Notes tab are not transmitted to the DIS. This information is local only.

Prescriber Folder

The Prescriber Folder allows you to add new or update existing health care professional records (e.g., physicians, nurse practitioners, pharmacists, optometrists, podiatrists, midwives, etc.) in Propel Rx.

Status

The **Status** field indicates the prescriber's current status on the Provider Registry (PR). The dropdown list includes Active, Suspended, or Terminated. By default, this is set to Active.

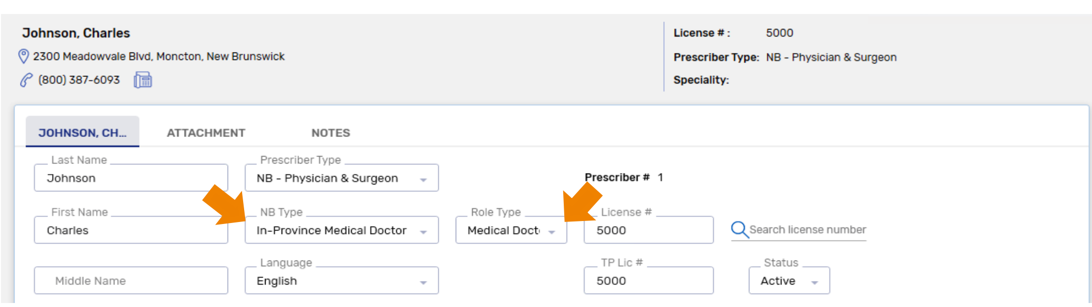


Role Type and NB Type

Both the **Role Type** and **NB Type** are mandatory fields for DIS transactions. The **Role Type** further defines the Prescriber Type (e.g., Prescriber Type of New Brunswick Dental Association would have a Role Type of Dentist). The **NB Type** identifies prescribers that may be different (e.g., In-Province Dentist versus an Out-of-Province Dentist) and auto-populates based on the chosen Prescriber Type. For new Prescriber Folders, these fields default to values that correspond with a New Brunswick physician:

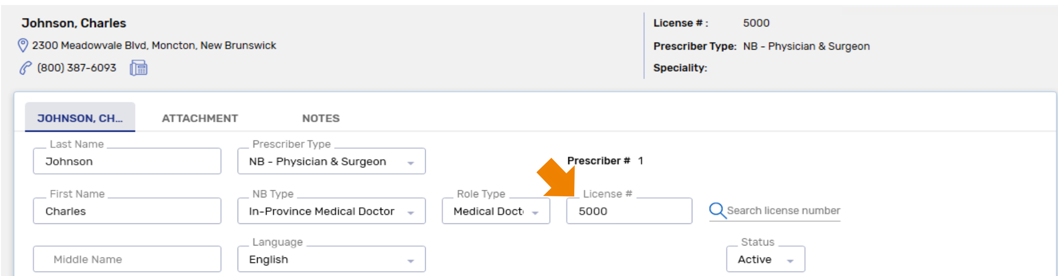
- **Prescriber Type** = NB – Physician & Surgeon
- **Role Type** = Medical Doctor
- **NB Type** = In-Province Medical Doctor

In certain instances, you may be required to use a default NB Type and License #. For more information, see Default Providers.



License

In New Brunswick, all prescriptions must be submitted to the DIS using the license number issued by the Prescribers' Licensing Body/Association. The number entered in the **License #** field will be sent to the DIS and Third Parties.



MD Match

When adding new prescribers to your prescriber database, the MD Match button in the Prescriber Search window allows you to search a provincial database of prescribers. For each prescriber, this database contains an address, license number, and at least one phone number. Please note, MD Match is not integrated with the EHR.

TIP: The MD Match function is useful when the prescriber is not known to your pharmacy, and you cannot make out the signature, but you can identify the license number. You can perform a search using the **License #** field. To perform a wildcard search, replace one or more numbers in the license number with a %.

If a prescriber cannot be located via MD Match, search the applicable provincial college registry. Click on the magnifying glass beside the **License #** field to open the College of Physicians and Surgeons of New Brunswick's physician search page in your browser.

TIP: The Provider Registry (PR) is another comprehensive source for prescriber information. It can be accessed from the NB Clinical Viewer and includes all eligible prescribers.

To use MD Match to locate a physician:

1. Select the **Prescriber** navigator button on the left. The Prescriber Search window opens.
2. Enter in the prescriber search criteria.
3. Select **Search**.
4. If the prescriber is not found, select the **MD Match** button at the bottom. The Master Doctor Search window opens. The search criteria are displayed.
5. Select **Search**.
6. Highlight the correct prescriber from the search results.

7. Select **OK**. The Prescriber Folder opens.
8. If required, update the prescriber's information including **Role Type**, **NB Type**, and **Address** fields.
9. Select **Save**.

Default Providers

If you cannot find a prescriber after exhausting all search options, including the Provider Registry (PR) or MD Match, you may use a default provider to transmit prescriptions to the DIS.

ALERT: Use of default providers is monitored by NB DIS. Ensure that a default provider is only used as a last resort when the prescriber cannot be found.

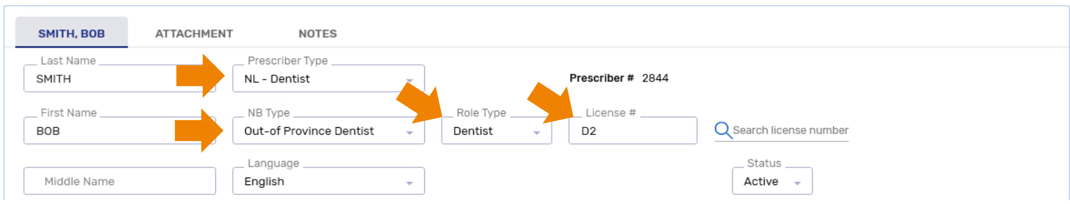
To use a default provider:

1. Exhaust all search options to ensure the prescriber does not exist.
2. Select **New** in the Prescriber Search window to create a new Prescriber Folder.
3. Enter all necessary information in the Prescriber Folder (i.e., Name, Address, Phone, Prescriber Type, Status).
4. Using the table below, set the following fields:
   - **License #**
   - **Role Type**
   - **NB Type**

License #	Role Type	NB Type
D1	Dentist	In-Province Dentist
D2	Dentist	Out-of-Province Dentist
D3	Medical Doctor	In-Province Medical Doctor
D4	Medical Doctor	Out-of-Province Medical Doctor
D5	Pharmacist	In-Province Pharmacist
D6	Pharmacist	Out-of-Province Pharmacist
D7	Registered Nurse Practitioner	In-Province Registered Nurse Practitioner
D8	Registered Nurse Practitioner	Out-of-Province Registered Nurse Practitioner
D9	Optometrist	In-Province Optometrist
D10	Optometrist	Out-of-Province Optometrist
D11	Midwife	In-Province Midwife

D12	Midwife	Out-of-Province Midwife
D13	Podiatrist	In-Province Podiatrist
D14	Podiatrist	Out-of-Province Podiatrist
D999	Other Provider	Out-of-Province Other Provider

5. Select **Save**. You are now able to fill a prescription, as per normal process, using this provider.



Drug Folder

The Drug Folder contains fields that are submitted to the DIS with each prescription filled.

Drugs can be created centrally or locally.

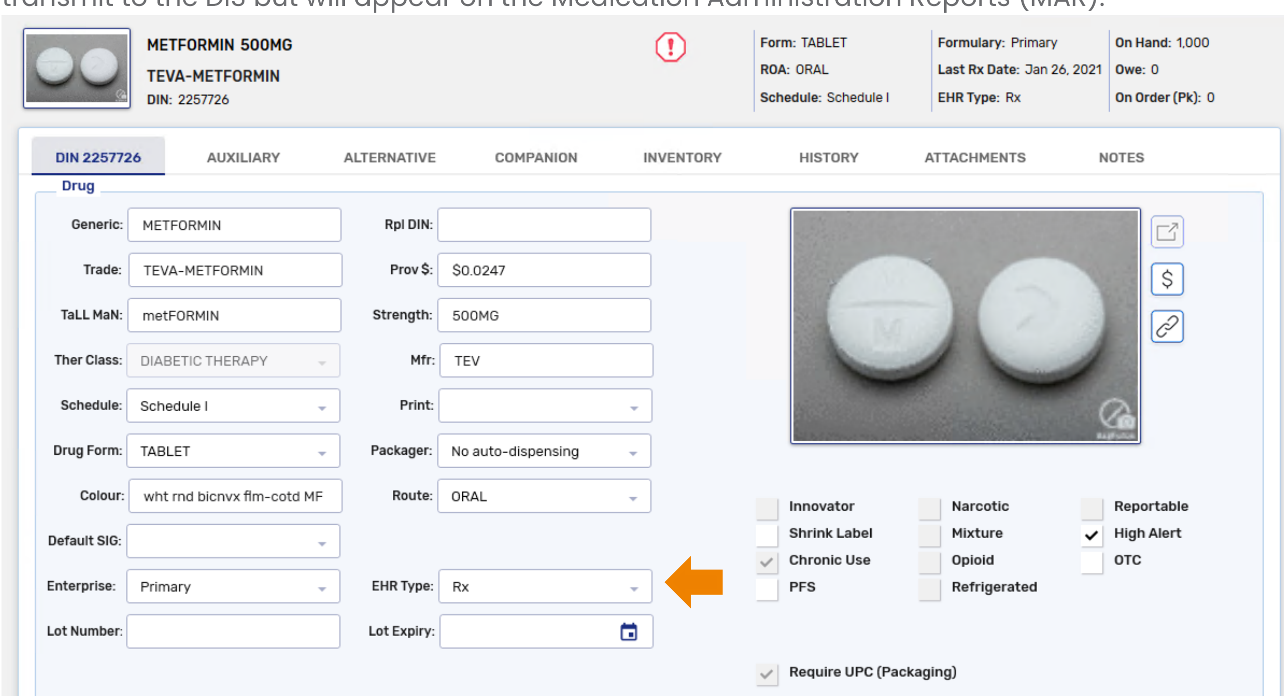
- **Central drugs** – refers to drugs that are created by Pharmacy Technology Solutions (PTS). The EHR fields will be set up automatically where possible.
- **Local drugs** – refers to drugs that are created free-form by your pharmacy. The DIS fields must be set up by your pharmacy.

Main Tab

EHR Type

The EHR Type determines if the drug is submitted to the DIS or not. This field is always editable.

- **Rx** – Prescription messages are transmitted to the DIS. This is the default value when a free-form drug is created. This should only be used when dispensing a drug with a valid DIN/NPN.
- **Non-EHR** – Prescriptions for these types are not transmitted to the DIS. This should only be used for devices (e.g., test strips, glucometer, compression stockings) or treatments that should not be transmitted to the DIS (e.g., *restrained at night* for a long term care patient). Treatments will not transmit to the DIS but will appear on the Medication Administration Reports (MAR).



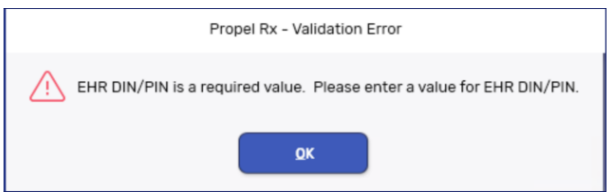
To update the EHR Type from the Drug Main tab:

1. Open the **Drug Folder**.
2. Select the **Main** tab.
3. Dropdown the **EHR Type** field and select the appropriate option.
4. Select **Save**.

Alternative Tab

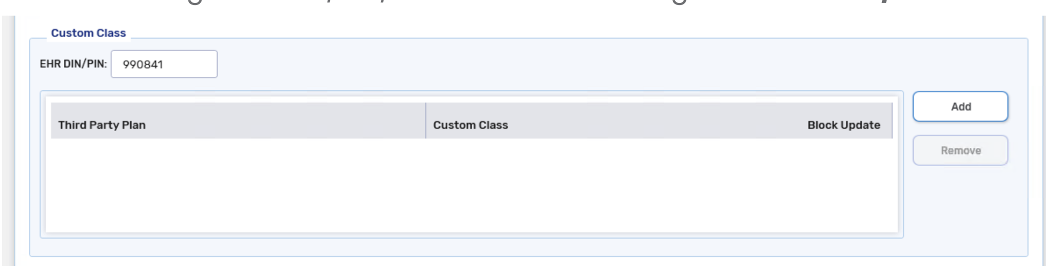
EHR DIN/PIN

The EHR DIN/PIN field provides a means to submit an alternative DIN/PIN/NPN to the DIS. This field is mandatory for free-form drugs; if left blank, the following prompt appears upon saving the free-form Drug Folder.



To add or update the EHR DIN/PIN from the Drug Alternative tab:

1. Open the **Drug Folder**.
2. Select the **Alternative** tab.
3. Enter the recognized DIN/PIN/NPN value for the drug in the **EHR DIN/PIN** field.



4. Select **Save**.

SUBMITTING PRE-MADE MIXTURES TO THE DIS

If you purchase pre-made mixtures from another pharmacy, you may have created a free-form Drug Folder for the mixture. For instructions on creating the Drug Folder, see Handling Pre-Made Mixtures.

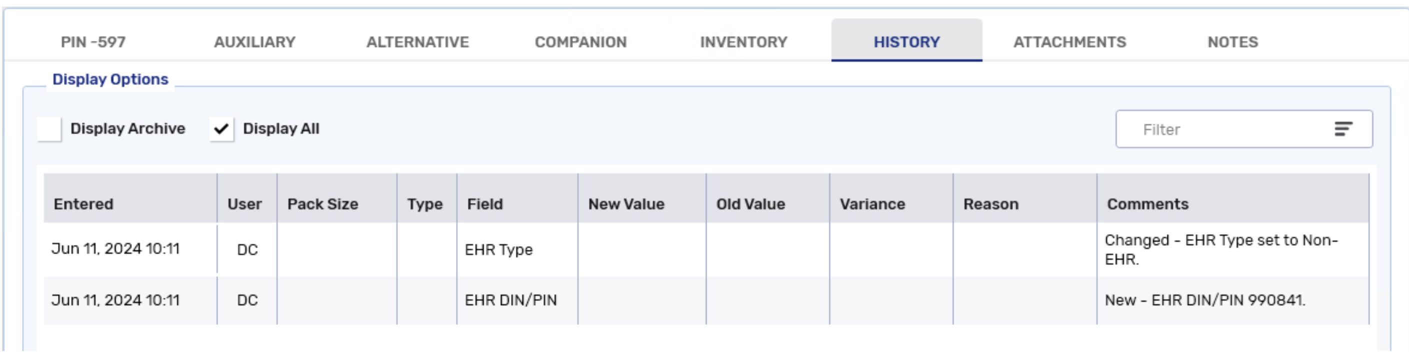
For the drug to be accepted by the DIS, you must set the following in the Drug Folder:

- **EHR Type** = Rx
- **EHR DIN/PIN** = DIN of the eligible active ingredient

If you are submitting the prescription to a Third Party plan and they require a compound flag to be transmitted, you can create a Mixture Folder using the free-form Drug Folder as the only ingredient. For instructions on creating the Mixture Folder, see Handling Pre-Made Mixtures.

History Tab

The History tab records when the EHR Type or EHR DIN/PIN have been changed. The entered date, user, event, and event details are recorded for reference.



Entered	User	Pack Size	Type	Field	New Value	Old Value	Variance	Reason	Comments
Jun 11, 2024 10:11	DC			EHR Type					Changed - EHR Type set to Non-EHR.
Jun 11, 2024 10:11	DC			EHR DIN/PIN					New - EHR DIN/PIN 990841.

Adding a New Drug

If a Drug Folder does not exist for a drug or device you need to dispense, you have the option to create a free-form Drug Folder. It is important to note that free-form Drug Folders must be maintained by your pharmacy, they are not maintained by PTS.

TIP: If you would like PTS to create the Drug Folder and thereby maintain it, you can submit a Drug Add Request from the PTS Portal.

For information on how to create a free-form Drug Folder, refer to the Propel Rx Online Help. Ensure to set up the EHR Type and EHR DIN/PIN as follows.

If the drug is…	EHR Type	EHR DIN/PIN
A real drug with a DIN/NPN	Rx	DIN/PIN/NPN
A device (e.g., test strip, glucometer, compression stockings), treatment, or otherwise should not be transmitted to the DIS	Non-EHR	Not applicable

Mixture Folder

The Mixture Folder contains fields that are submitted to the DIS with each prescription filled. All ingredient names, DINs (or DIS DIN/PINs), and quantities are transmitted in a mixture prescription.

Main Tab

Name

The Generic and Trade name of the mixture is submitted with the DIS Prescription message.

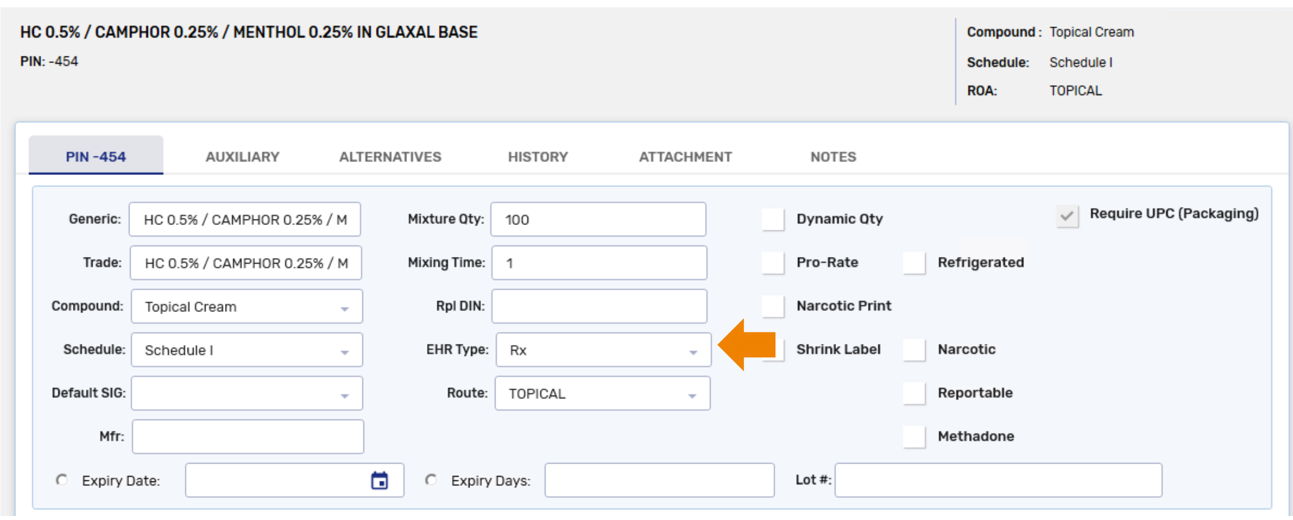
EHR Type

The EHR Type determines if the mixture is submitted to the DIS or not. This field is always editable.

- **Rx** – Prescription messages are transmitted to the DIS. This is the default when a free-form mixture is created.
- **Non-EHR** – Prescriptions for these types are not transmitted to the DIS.

To update the EHR Type from the Mixture Main tab:

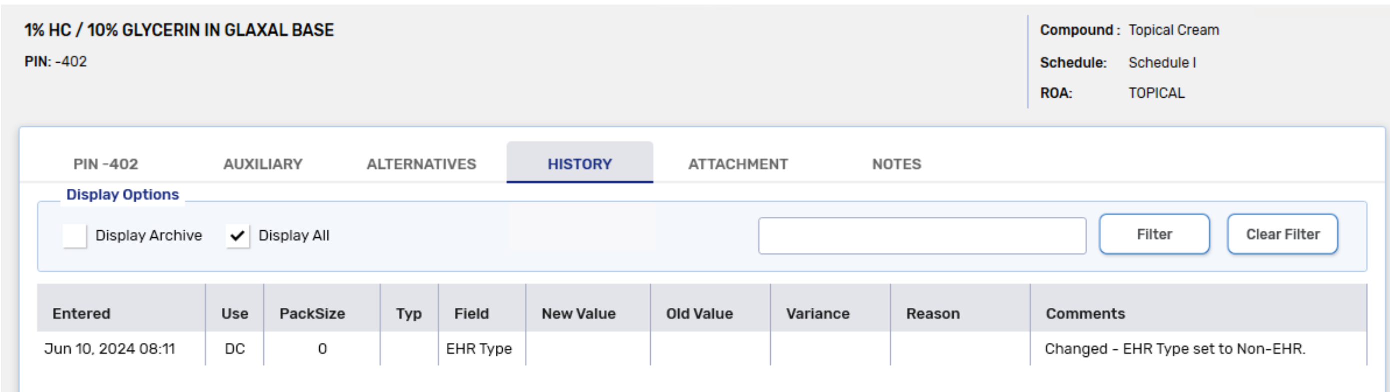
1. Open the **Mixture Folder**.
2. On the Main tab, dropdown the **EHR Type** field and select the appropriate option.



3. Select **Save**.

History Tab

The **History** tab in the Mixture Folder records when the **EHR Type** has been changed. The entered date, user, event, and event details are recorded for reference.



Adding a New Mixture

If a Mixture Folder does not exist for a mixture you need to dispense, you have the option to create it. It's important to note that all Mixture Folders must be maintained by your pharmacy, they are not maintained by PTS.

For information on how to create a Mixture Folder, refer to the Propel Rx Online Help. Ensure to set up the EHR Type for the mixture as follows.

If the mixture…	EHR Type
Should be transmitted to the DIS	Rx
Should not be transmitted to the DIS	Non-EHR

Submitting Mixture Ingredients That Have No DIN/NPN/PIN to the DIS

Mixtures that are transmitted to the DIS must be identified with the appropriate DIN/NPN/PIN for each ingredient in the compound. When an ingredient in a mixture does not already have a proper DIN/NPN (i.e., a chemical supplied by PCCA, Wiler, Holista, etc), use the assigned NB PIN if listed in the NB Drug Plans Formulary, or if not listed in the formulary, the following list of generic PINs can be used for submission to the DIS.

Drug	NB DIS Generic PIN
Drug ingredient monitored by the New Brunswick Prescription Monitoring Program (i.e., opioid, controlled drug) that originates from a supplier without a DIN or PIN (e.g., Wiler, PCCA, etc.). Examples: fentanyl, codeine, testosterone, etc.	08881000
Active drug ingredient that is not monitored by the New Brunswick Prescription Monitoring Program that originates from a supplier without a DIN, NPN, or PIN. Examples: sulfur, salicylic acid, menthol, etc.	08881001
Non-active drug ingredient such as creams, bases, diluents, and suspending vehicles that do not have a DIN, NPN, or PIN.	08881002

NOTE: If the mixture ingredient has a proper DIN/NPN/PIN, it should be transmitted. If the ingredient was created as a free-form drug, the DIN/NPN/PIN must be entered in the EHR DIN/PIN field of the Drug Folder Alternative tab.

To enter a DIS generic PIN for a mixture ingredient:

1. Open the **ingredient Drug Folder**.
2. Select the **Main** tab.
3. Ensure the **EHR Type** is set to Rx.
4. Select the **Alternative** tab.
5. In the **EHR DIN/PIN** field, enter the appropriate generic PIN as per the table above. **Only use generic PINs for drugs that have no proper DIN/NPN/PIN.**
6. Select **Save**.
7. Repeat steps 1 – 6 for the remaining ingredients in the mixture that do not have a proper DIN/NPN/PIN. Once done, you can submit a prescription for the mixture to the DIS.

Filling a Prescription

In New Brunswick, all prescriptions are inferred. This means the DIS infers the prescription from a pharmacy dispense, and a Create message is not sent by the pharmacy.

All drugs dispensed for a real DIN, NPN, or mixture must be added to the DIS before it can be submitted online to Third Party payers for payment. The DIS captures all prescriptions, including cash prescriptions, unless the patient has a non-EHR patient status and/or the Drug or Mixture Folder has an EHR Type of Non-EHR.

When a prescription is filled or queued, the logged in user is transmitted in the Dispense message, along with the associated pharmacist if applicable. If another pharmacist is dispensing the prescription, you can log out of Propel Rx and log back in as the dispensing pharmacist.

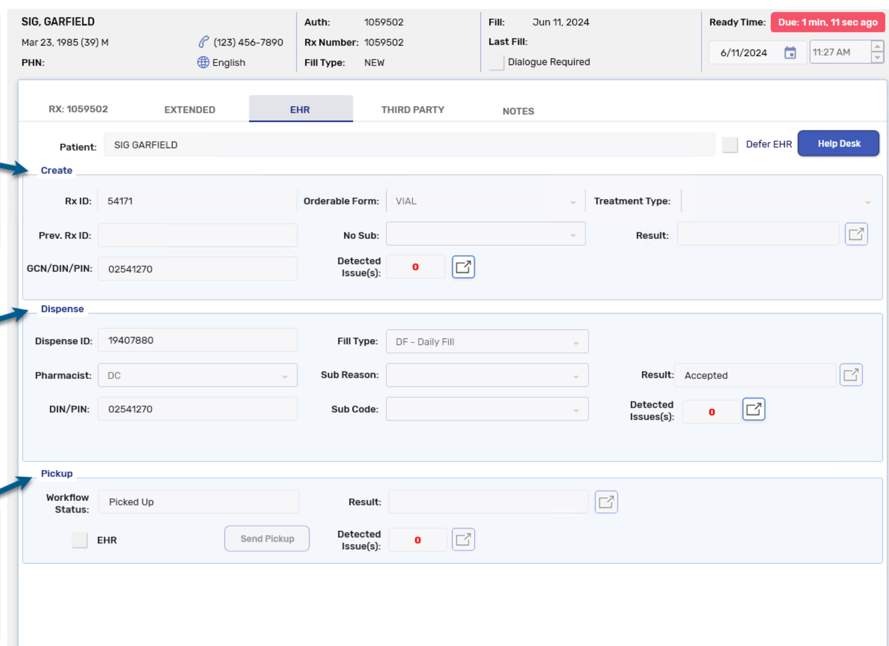
EHR Tab

The **Rx Detail EHR** tab indicates the EHR information associated with 2 Prescription messages: Create and Dispense.

Create
Contains information pertaining to the prescription as it was prescribed. This section is read-only. The Rx ID is assigned to the first prescription filled from an authorization in the same chain, if it exists; this is blank for refills.

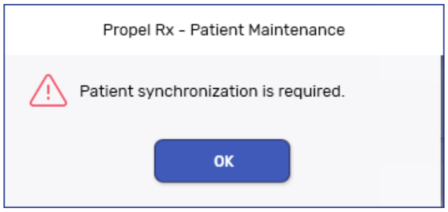
Dispense
Contains information pertaining to the fill of the prescription. A Dispense ID is assigned for each dispense transmitted to the DIS. The Sub Reason and Sub Code can be selected if you want to provide rationale for changing a drug.

Pickup
This section is not applicable in New Brunswick. Pickup messages are not transmitted to the DIS.



Filling a Prescription for an Unsynchronized Patient

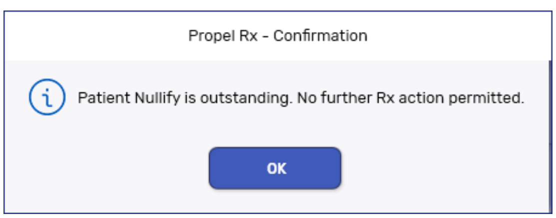
If a prescription is filled for an unsynchronized patient, a prompt appears in Rx Detail. This prompt will block you from processing the prescription until you sync the patient. For information on how to sync a patient, see Synchronization Scenarios.



NOTE: This section does not apply to patients that have an Animal, Doctor Office, Pharmacy, or Caregiver status. It also does not apply to Facility patients (Patient Folders that represent a nursing home or other facility location). For more information, see Patient Status.

Filling a Prescription for a Nullified Patient

If a prescription is filled for a nullified patient, a prompt appears in Rx Detail. This prompt will block you from processing the prescription. You must create a new Patient Folder to fill prescriptions for them. To reduce confusion of which Patient Folder to use, the nullified Patient Folder can be merged with the new Patient Folder. For more information, see Merging Patients.



NOTE: This section does not apply to patients that were nullified by changing an Active status to Animal. In this situation, the Patient Folder can continue to be used to fill prescriptions.

Filling a New Prescription

When a paper prescription is transcribed and filled, Propel Rx transmits the Dispense message to the DIS. This updates the prescription on the DIS with the dispense information.

To fill a new prescription:

1. Select **Intake** from the Workbench or Patient Profile.

2. Enter the prescription details in the Intake window.
3. Select **Process**. The prescription opens in Rx Detail.
4. Enter any required information in the **Main** tab of Rx Detail.
5. *Optional* – Select the **EHR** tab to specify a **Sub Reason** and/or **Sub Code** for the dispense.
    - **Sub Reason** – rationale for dispensing the drug (e.g., Continuing Therapy, Out of Stock).
    - **Sub Code** – category for the drug (e.g., Formulary, Generic, Therapeutic).
6. Once done, select **Fill** or **Queue**. The Dispense message is transmitted to the DIS.

In the EHR tab, the **Create** section shows the Rx ID for the authorization, which is carried over for refills. The **Dispense** section shows the Dispense ID for that fill. The patient's local Profile displays a prescription status of **Complete** (**COM**).

NOTE: When filling methadone prescriptions, the Rx > Methadone window can be used to specify ingestion dates and the number of carries if applicable. For more information, see Methadone Prescriptions.

Refilling a Prescription

A prescription's audit history lists the refill history for the prescription, including the original prescription and any subsequent refills and reauthorizations. When refilling a prescription, the prescription's audit history and/or the DIS Profile should be verified to determine when the prescription was last filled.

To refill a prescription:

1. Do one of the following:
    - From the **Patient Profile**, select the prescription and then select Refill.
    - From the **Intake** window, select Profile. Select the prescription and then select Refill. Select OK to close the Profile window and process the prescription until it reaches Rx Detail.
2. In Rx Detail, select **Fill** or **Queue**.

In the EHR tab, the **Dispense** section shows the Dispense ID for that fill. The patient's local Profile displays a prescription status of **Complete** (**COM**).

Changing the Prescriber, Drug, or SIG for Refill Prescriptions

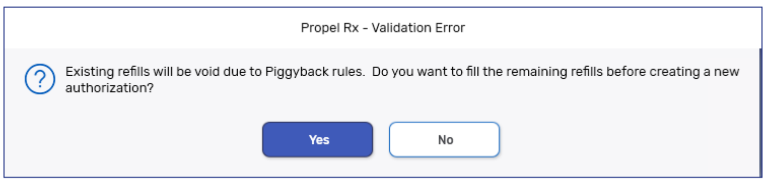
When a prescription has been recorded on the patient's DIS Profile, you will not be permitted to update any fields that were transmitted to the DIS such as the prescriber, drug (unless it's to an interchangeable), or SIG. If a change is required, correct the original prescription (i.e., First Fill or Hold if it was never filled) or reauthorize it.

Reauthorizing a Prescription

When a prescription is reauthorized, a new Rx ID is assigned, and the previous Rx ID becomes linked to the new authorization on the DIS.

To reauthorize a prescription:

1. Do one of the following:
   - From the **Patient Profile**, select the prescription and then select Refill.
   - From the **Intake** window, select Profile. Select the prescription and then select ReAuth. Select OK to close the Profile window and process the prescription until it reaches Rx Detail.
2. In Rx Detail, enter the new **QA**.
3. Enter any other required information in Rx Detail.
4. Once done, select **Fill** or **Queue**.
5. If there were refills remaining, a prompt asks if you want to fill the remaining refills. Select **No**.



In the EHR tab, the **Create** section shows the previous Rx ID and the new Rx ID. The **Dispense** section shows the Dispense ID for that fill. The patient's local Profile displays a prescription status of **Complete** (**COM**).

Filling a PFS Prescription

Patient-Focused Services (PFS) such as Medication Reviews, COVID-19/flu injections, etc. can be billed as prescriptions from within Propel Rx. PFS prescriptions are auto-processed once the service is complete. If the patient is not synchronized and they have an EHR patient status or Detected Issues were returned, the prescription is placed in the Data Entry queue. For more information on billing PFS prescriptions, see Patient-Focused Service (PFS).

Placing a Prescription on Hold

When a paper prescription is transcribed and put on Hold for a patient, it is not transmitted to the DIS. Transmission will occur when the prescription is refilled.

To place a prescription on Hold:

1. Select the **Intake** button from the Workbench or Patient Profile.
2. Enter the prescription details.

3. Select **Process**. The prescription opens in Rx Detail.
4. Select **Hold**.

The prescription is not transmitted to the DIS; the **Create** and **Dispense** details are only populated once the prescription is filled. The Patient Profile in Propel Rx displays the prescription with a status of **Hold** (**HOL**).

Entering Unit of Measure

Prior to filling a prescription for a Mixture or free-form Drug, the unit of measure (UOM) must be selected in Rx Detail. If a UOM is not selected, you will be prompted to select one upon Fill.

To enter a UOM for a prescription:

1. Process the prescription until it reaches Rx Detail.
2. Dropdown the **Unit** field and select the appropriate option.
3. Continue to fill the prescription as usual.

Using the Additional Instructions Function

When longer instructions are required for a prescription than can fit in the Rx Detail SIG field, you can use the Additional Instructions function. Instructions entered in the Additional Instruction Label window are transmitted to the DIS and print on a separate vial label from the instructions entered in the Rx Detail SIG field.

To use the Additional Instructions function:

1. Open the incomplete prescription in Rx Detail.
2. Select **Rx** > **Add'l Instructions**. The Additional Instruction Label window opens.
3. Enter the instructions in the Additional Text section.
4. Select **OK**.
5. Continue to fill the prescription as usual.

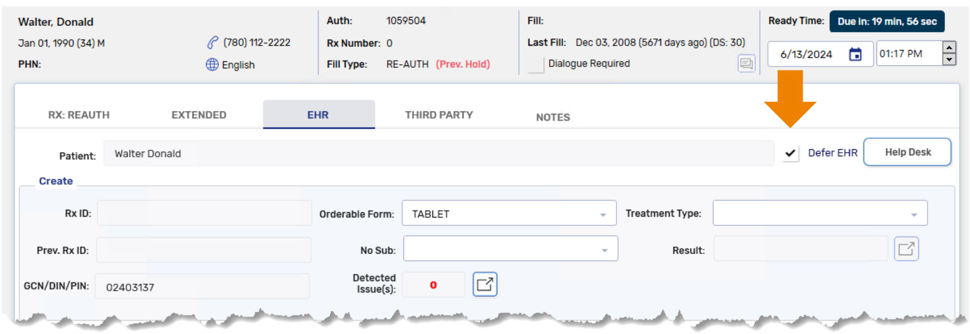
Deferring DIS Submission for Prescriptions

If you need to process a prescription but there are errors that you cannot resolve now (e.g., new drug is not recognized, technical errors, etc.), you can use the **Defer EHR** functionality. This functionality does not apply to patients that have a non-EHR patient status.

Defer EHR functionality allows you to temporarily bypass the DIS for prescriptions but adjudicate to the Third Parties. The Deferred prescriptions are added to the EHR Queue, and you are responsible for sending the applicable DIS transactions at the appropriate time.

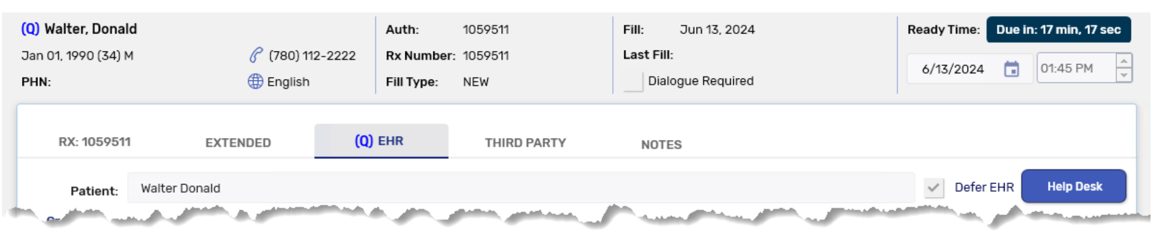
To defer the DIS submission for a prescription:

1. Process the prescription from the **Intake** window or **Patient Profile** until it reaches **Rx Detail**.
2. Select the **EHR** tab.
3. Select the **Defer EHR** checkbox.



4. Select **Fill**.

A **[Q]** indicator displays on the Patient Folder information bar when the patient has transactions currently in the EHR Queue. This acts as a reminder for you to deal with the EHR Queued prescriptions.



Refilling or Reauthorizing Deferred DIS Prescriptions

When the **Defer EHR** checkbox is turned ON for the previous prescription, refills and reauthorizations also have the Defer EHR checkbox turned ON and disabled until the previous record is submitted successfully to the DIS. The Deferred prescriptions and related transactions remain in the EHR Queue until actioned.

Correcting a Prescription

The Correct function allows you to fix errors (e.g., wrong quantity, drug, instructions) on a prescription that was processed by your pharmacy. Depending on the prescription and the Correct function used, a corresponding message may be transmitted to reverse the prescription from the DIS.

NOTE: In certain instances, you cannot correct a prescription such as a change in SIG or quantity of the prescription. In these scenarios, the original prescription must be discontinued and resubmitted. For more information, see Updating the Status of a Prescription from Propel Rx.

Amend Allows you to make changes to a processed prescription without impact to billing. These changes do not update the DIS and as a result, certain fields are disabled if the prescription was transmitted to the DIS.

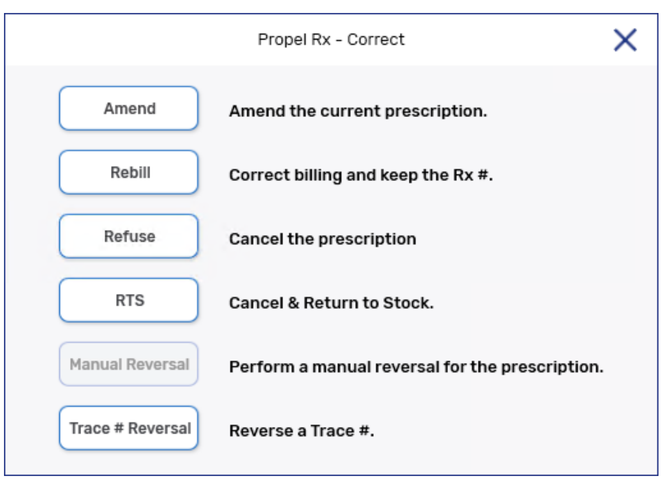
Rebill Allows you to cancel a prescription, correct it, and then fill the prescription in one step using the same authorization number and same Fill Date (e.g., incorrect quantity authorized for a First Fill).

Refuse Allows you to cancel the prescription (e.g., prescription filled in error).

RTS Allows you to cancel the prescription. RTS allows you to enter the prescription numbers by scanning privacy labels.

Manual Reversal Disabled in New Brunswick. However, this option is available from an Rx Detail prompt. For more information, see Bypassing Third Parties to Submit a Reversal to the DIS.

Trace # Reversal Allows you to reverse a claim from a Third Party using a unique trace number.



Amending a Prescription

Changes using the Amend function are not transmitted to the DIS. Therefore, for prescriptions that have been sent to the DIS, only certain prescription fields can be edited with an Amend. All other fields are disabled. Refer to the lists below for the fields that can be amended in Rx Detail.

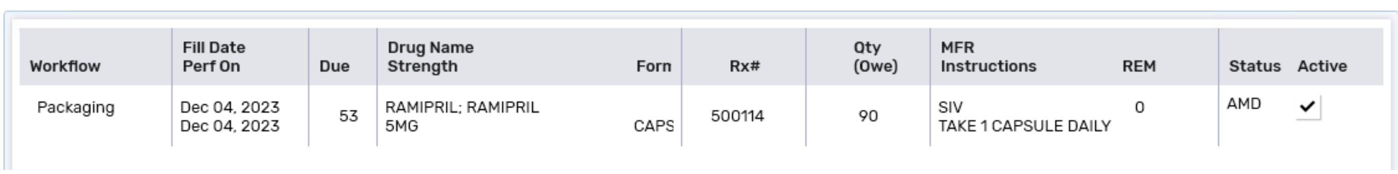
NOTE: For prescriptions that haven't been sent to the DIS, including Holds, all prescription fields are open for amending.

Main Tab	Extended Tab
• Labels • Refill Rem Days • Compliance Pack checkbox and dosing information (including Start and Stop Dates)	• Label setup • Drug Name (display on the label) • Language • Next Fill Qty • Lot # and Lot Expiry (for mixtures if Packaging is OFF) • Auto Refill and Leaflet checkboxes

To amend a prescription:

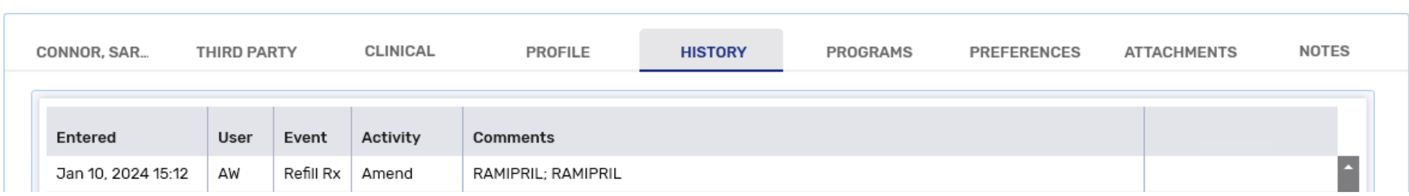
1. From the **Patient Profile** or **Workbench**, highlight the completed prescription.
2. Select **Correct**. The Correct window opens.
3. Select **Amend**. The prescription opens in Rx Detail.
4. Make the necessary edits in the allowed fields.
5. Select **Save**.
6. A prompt asks if you want to print a new vial label. Select **Yes** or **No**.

On the Patient Profile, the prescription's status is updated to **Amend** (**AMD**) to reflect that it was amended.



Workflow	Fill Date Perf On	Due	Drug Name Strength	Forn	Rx#	Qty (Owe)	MFR Instructions	REM	Status	Active
Packaging	Dec 04, 2023 Dec 04, 2023	53	RAMIPRIL; RAMIPRIL 5MG	CAPS	500114	90	SIV TAKE 1 CAPSULE DAILY	0	AMD	✓

In Patient History, a record is added indicating the user who performed the action and when it occurred.



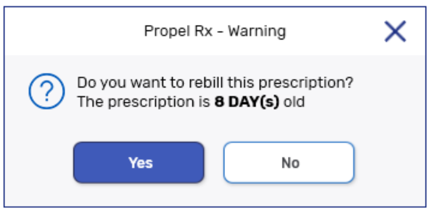
Entered	User	Event	Activity	Comments
Jan 10, 2024 15:12	AW	Refill Rx	Amend	RAMIPRIL; RAMIPRIL

Rebilling a Prescription

To rebill a filled prescription:

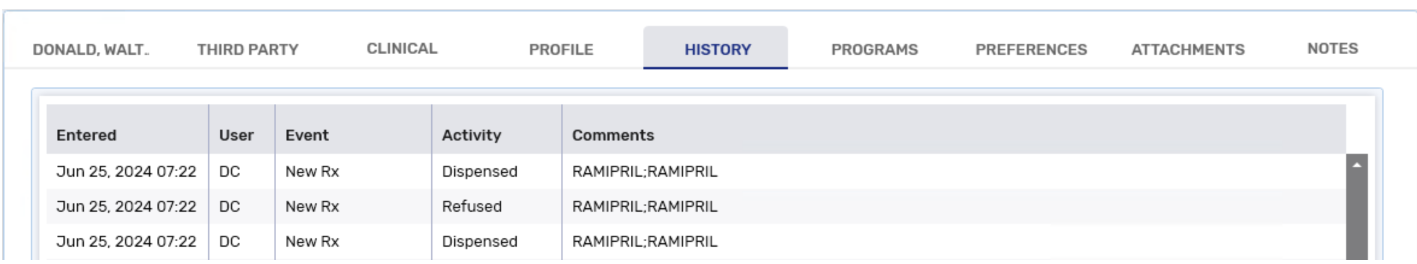
1. Do one of the following:
    a. From the **Workbench** or **Patient Profile**, highlight the completed prescription(s). Select **Correct** > **Rebill**.
    b. From **Rx Detail**, select **Correct** > **Rebill**.
    c. From the **Claim Summary** window, select **Rebill**.

   A prompt appears.



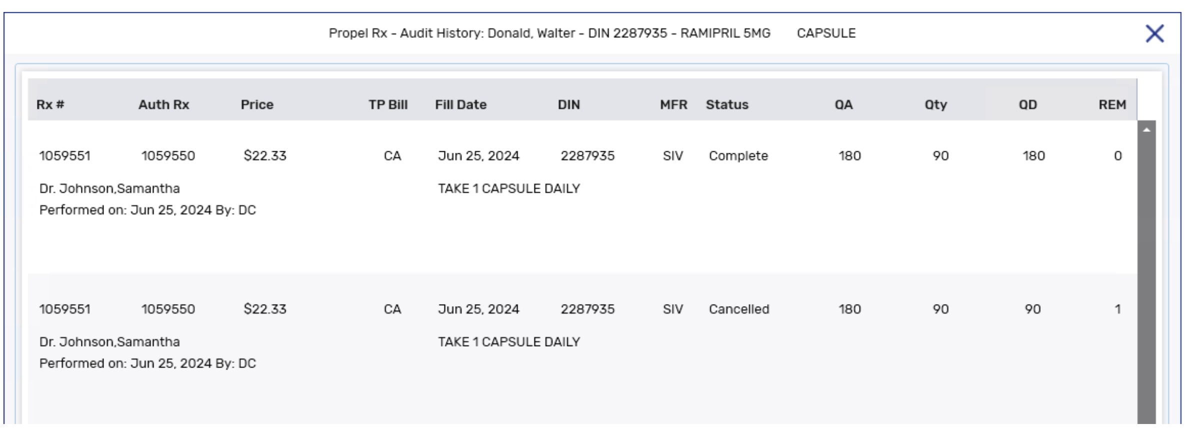
2. Select **Yes**. Propel Rx reverses the Third Party claim, and a reversal message is sent to the DIS.
3. Select **Fill**.

In Propel Rx, the prescription status is updated to **Complete** (**COM**), and the same prescription number is assigned. All successful prescription rebills are recorded in the Patient Folder History tab, as shown below.



Entered	User	Event	Activity	Comments
Jun 25, 2024 07:22	DC	New Rx	Dispensed	RAMIPRIL;RAMIPRIL
Jun 25, 2024 07:22	DC	New Rx	Refused	RAMIPRIL;RAMIPRIL
Jun 25, 2024 07:22	DC	New Rx	Dispensed	RAMIPRIL;RAMIPRIL

The Audit History for the prescription also accurately tracks the refusal and fill, as shown below.



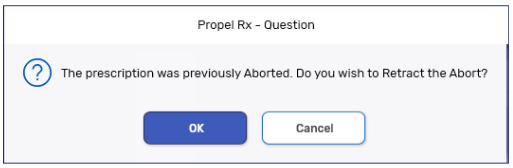
Rx #	Auth Rx	Price	TP Bill	Fill Date	DIN	MFR	Status	QA	Qty	QD	REM
1059551	1059550	$22.33	CA	Jun 25, 2024	2287935	SIV	Complete	180	90	180	0
Dr. Johnson,Samantha Performed on: Jun 25, 2024 By: DC				TAKE 1 CAPSULE DAILY							
1059551	1059550	$22.33	CA	Jun 25, 2024	2287935	SIV	Cancelled	180	90	90	1
Dr. Johnson,Samantha Performed on: Jun 25, 2024 By: DC				TAKE 1 CAPSULE DAILY							

Refusing and Refilling a Discontinued Prescription

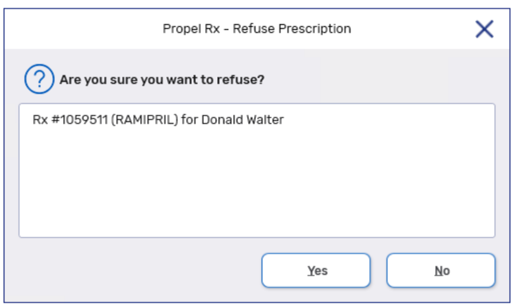
If a prescription is discontinued and located on the DIS, you cannot rebill it. To correct any billing information, you must reactivate the discontinued prescription, refuse it, and create a new prescription.

To reactivate, refuse, and refill a discontinued prescription:

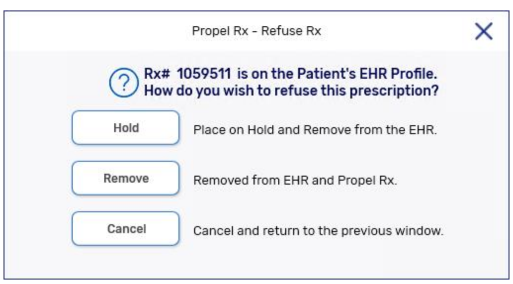
1. From the **Patient Profile**, select the **Active** checkbox for the discontinued prescription.
2. A prompt appears to confirm the retraction of the Abort. Select **OK**. A message transmits to the DIS to reactivate the prescription.



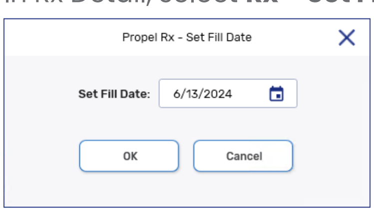
3. Highlight the prescription and select **Correct** > **Refuse**. A validation prompt appears.



4. Select **Yes**. The Refuse Rx window opens.



5. Select **Remove**.
6. Create a new prescription for the same patient using the correct billing information.
7. Backdate the prescription by following the steps below:
   a. In Rx Detail, select **Rx** > **Set Fill Date**. The Set Fill Date window opens.



   b. Enter the appropriate date or select one using the calendar button.
   c. Select **OK**.

8. Select **Fill**.
9. Discontinue the new prescription you just created.

NOTE: It is your pharmacy's responsibility to ensure that all Third Party billing is correct, including claim reversals, and that all documentation is in place in case there is any type of audit performed.

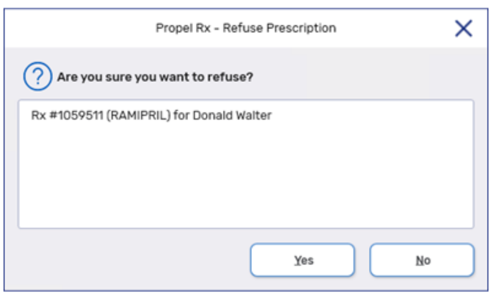
Refusing a Prescription

When a prescription is refused, evidence of the refusal is recorded in the prescription's Audit History.

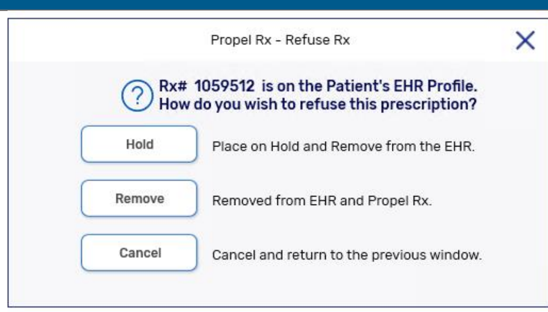
To refuse a prescription:

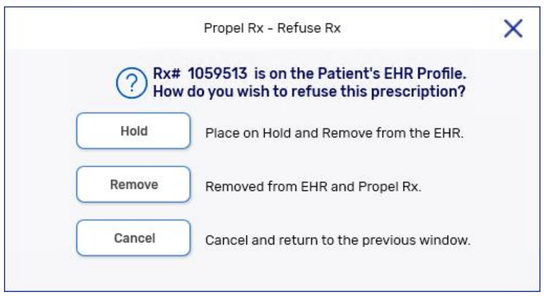
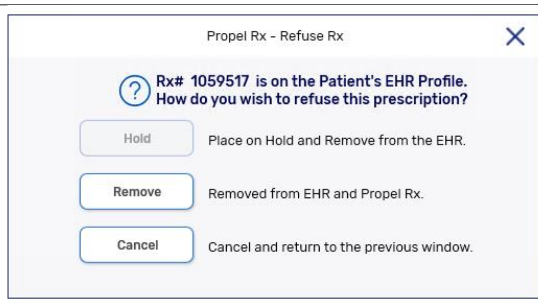
1. Do one of the following:
   a. From the **Patient Profile** or **Workbench**, highlight the prescription(s). Select **Correct** > **Refuse**.
   b. From **Rx Detail**, select **Correct** > **Refuse**.
   c. From the **Claim Summary** window, select **Refuse**.
   d. From the **Batch Profile** window, highlight the prescription(s) and select **Refuse**.

   A validation prompt appears.

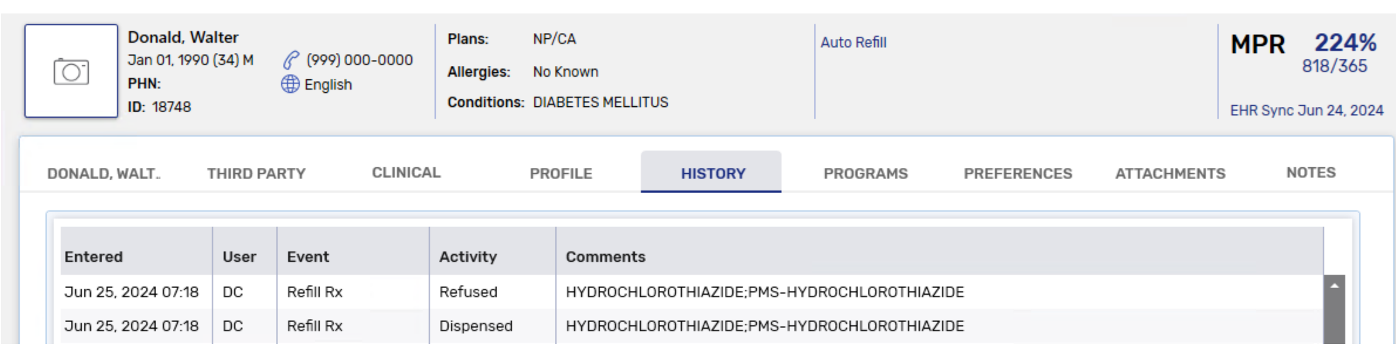


2. Select **Yes**. The Refuse Rx window opens.
3. Choose the applicable option in the Refuse Rx window. Depending on the prescription scenario, the buttons that are visible in the window vary, as indicated in the chart below.

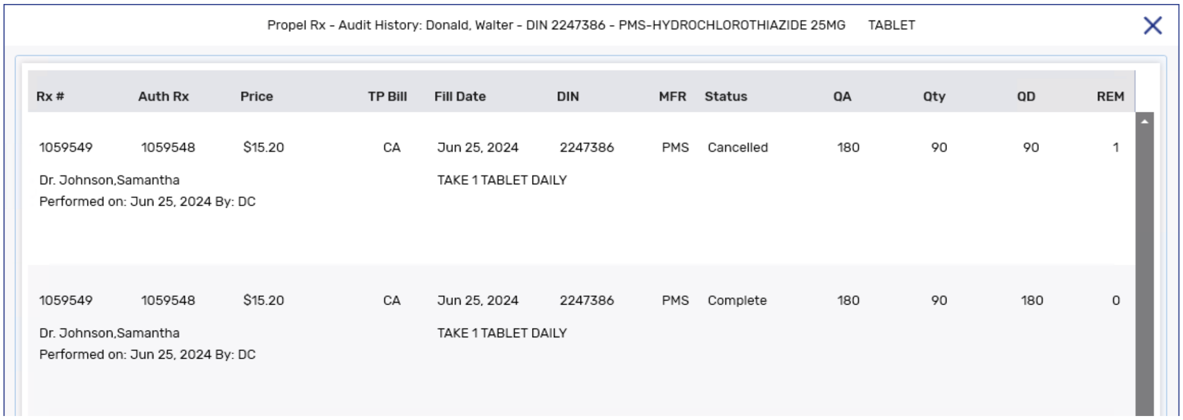
Prescription Scenario	Prompt	Options/Actions
First fill of a prescription		• **Hold**: Reverses the claim from the Third Party and DIS. The prescription is marked with a *Hold* status locally and no record will exist on the DIS Profile. All subsequent fills will be dispensed using a new Rx ID. • **Remove**: Reverses the claim from the Third Party and DIS. The

		prescription is removed from the patient's local Profile and DIS Profile. • **Cancel**: Exits with no changes.
First fill of a prescription that was not transmitted to the DIS (i.e., Drug EHR Type = Non-EHR)		• **Hold**: Reverses the claim from the Third Party. The prescription is marked with a *Hold* status locally. • **Remove**: Reverses the claim from the Third Party. The prescription is removed from the patient's local Profile. • **Cancel**: Exits with no changes.
Refill of a prescription	No prompt is displayed	• Reverses the claim from the Third Party and DIS. The prescription is marked with a *Cancelled* status locally and reversed on the patient's DIS Profile. The prescription can be refilled again later.
Prescription is on Hold		• **Remove**: Removes the prescription from the patient's local Profile. The prescription can be filled again later. • **Cancel**: Exits with no changes.

All successful prescription refusals are recorded in the Patient Folder History tab, as shown below.



The Audit History for the prescription also accurately tracks the refusal, as shown below.


Propel Rx - Audit History: Donald, Walter - DIN 2247386 - PMS-HYDROCHLOROTHIAZIDE 25MG TABLET

Rx #	Auth Rx	Price	TP Bill	Fill Date	DIN	MFR	Status	QA	Qty	QD	REM
1059549	1059548	$15.20	CA	Jun 25, 2024	2247386	PMS	Cancelled	180	90	90	1
Dr. Johnson,Samantha Performed on: Jun 25, 2024 By: DC				TAKE 1 TABLET DAILY							
1059549	1059548	$15.20	CA	Jun 25, 2024	2247386	PMS	Complete	180	90	180	0
Dr. Johnson,Samantha Performed on: Jun 25, 2024 By: DC				TAKE 1 TABLET DAILY							

If for any reason, the reversal message is unsuccessful, you are presented with a Detected Issue explaining why the reversal could not be completed.

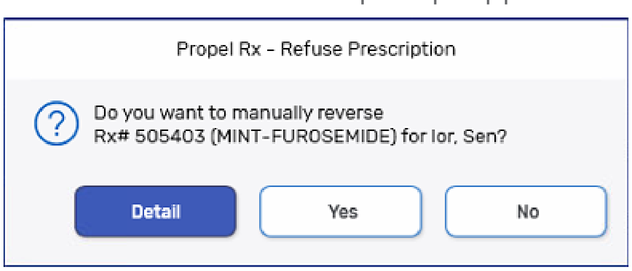
Bypassing Third Parties to Submit a Reversal to the DIS

If a claim reversal is rejected by a Third Party, you can use the Manual Reversal option to submit the reversal to the DIS. If the prescription was rebilled, you will need to manually refill it following the manual reversal. Any electronic cancellations that were not successfully transmitted to Third Party adjudicators will be skipped.

ALERT: Appropriate action (e.g., calling the Third Party and requesting a claim cancellation) will be required to reverse the claim from the Third Party end.

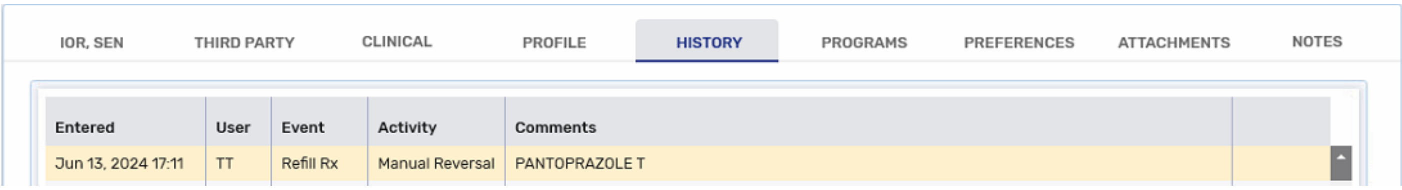
To manually reverse a prescription:

1. Follow the steps in Refusing a Prescription or Rebilling a Prescription.
2. When the claim reversal gets rejected by a Third Party, select **Correct**.
3. Select **Manual Reversal**. A prompt appears.



4. Select **Yes**.

In Propel Rx, the prescription status is updated to **Cancelled** (**CAN**), and a row is added to the Patient Folder History tab.



In the Audit History, a *MANUAL REVERSAL* indicator appears for the cancelled prescription.

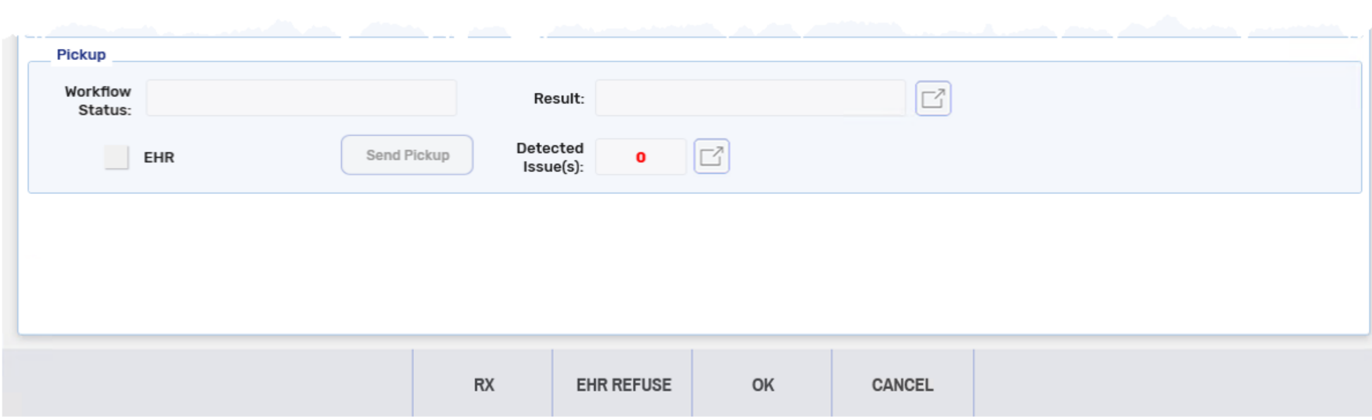
Resubmitting a Reversal to the DIS

If an error is returned by the DIS when refusing a prescription, the prescription status may be updated (e.g., Cancelled) in Propel Rx but not on the DIS. The **Result** field in the Rx Detail EHR tab will display Reverse Failed for the Dispense section. Once the Detected Issue(s) is resolved, the reversal can be resubmitted to the DIS using the **EHR Refuse** button in Rx Detail.

Smarter & Faster

Prescriptions That Were Not Removed

If a prescription was not removed from the local Profile in cases where you wanted it to be, discontinue the prescription instead. For more information, see Updating the Status of a Prescription from Propel Rx. If the prescription needs to be filled again, reauthorize the prescription or create a new prescription chain.



Prescription Status

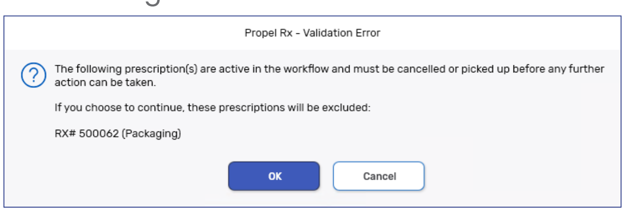
Updating the Status of a Prescription from Propel Rx

After a prescription is processed on a patient's Profile, it is flagged as Active. If the patient is no longer actively taking a medication, the prescription should be inactivated. When the status of a prescription is changed to **Discontinued**, an Abort message is transmitted to the DIS if the patient is synced. When the status of a prescription is changed to **Inactivated** or **Suspended**, the status change is local only; the prescription remains Active on the DIS Profile. It is important that you inactivate the drugs that a patient is not currently taking. This makes their Profile more accurate in Propel Rx and/or the EHR to support clinical decision making.

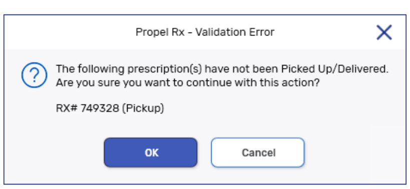
A notes function allows you to document the reason for inactivating a prescription. This note is for local reference only; it is not transmitted to the DIS. The note is visible from the Rx Detail Notes tab when the prescription is detailed.

To inactivate a prescription from Propel Rx:

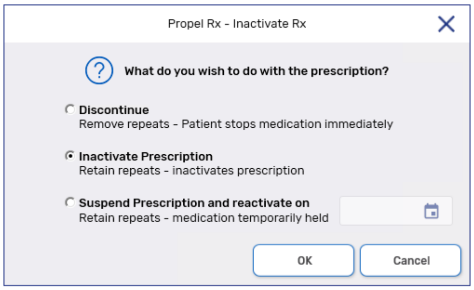
1. Open the **Patient Folder**.
2. Select the **Profile** tab.
3. Uncheck the **Active** checkbox for the prescription that needs to be inactivated. Prescriptions must be inactivated one at a time.
4. The following prompts may appear depending on the Workflow status of the prescription:
    a. If the prescription has not completed Workflow, a prompt indicates the prescription will not be inactivated. Select **OK**. Process the prescription through Workflow or cancel it before inactivating.

    a. If the prescription has not been picked up or delivered, a prompt asks if you want to continue. Select **OK** to continue.

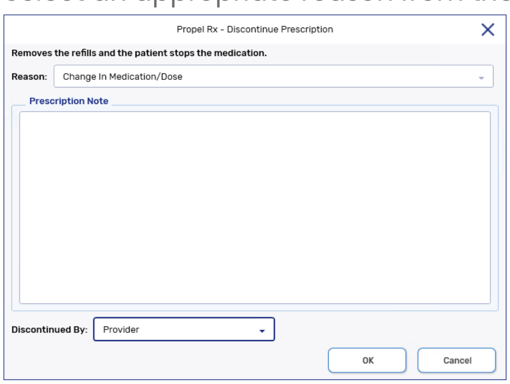
    

5. In the Inactivate Rx window, select one of the following options:



Propel Rx Term	EHR Term	Details
Discontinued	Aborted	Patient will no longer take the medication, effective immediately. Repeats are removed in Propel Rx. An Abort message is transmitted to the DIS so other health care professionals are aware while viewing the EHR.
Inactivated	N/A	Patient is not currently taking the medication but may resume later. Repeats are retained. No message is transmitted to the DIS.
Suspended	N/A	Patient will stop the medication for a specific period and then resume on a chosen date. Repeats are retained. On the specified date, the prescription status will change back to Active in Propel Rx. No message is transmitted to the DIS.

6. Select **OK**. An additional window opens.
7. Select an appropriate reason from the dropdown menu.



8. *Optional*: Enter any notes for the inactivation. This information is not transmitted to the DIS.
9. *Optional*: Select who (i.e., Agent, Patient, Provider) initiated the inactivation process. This information is not transmitted to the DIS.
10. Select **OK**.

If the prescription was discontinued, a processing message displays and closes upon successful completion of the message to the DIS.

The following updates are made:

- The prescription is flagged as Inactive on the Patient Profile in Propel Rx with one of the following indicators:
    - Discontinued = *D*
    - Inactivated = *I*
    - Suspended = *S*
- A row is added to the Patient Folder History tab for the prescription status update.
- If the prescription was discontinued, the refills are updated to 0.

If discontinuing a prescription and a Detected Issue is returned by the DIS, appropriate action must be taken before the status change is committed. If an error is returned, the prescription's status remains unchanged locally and on the DIS.

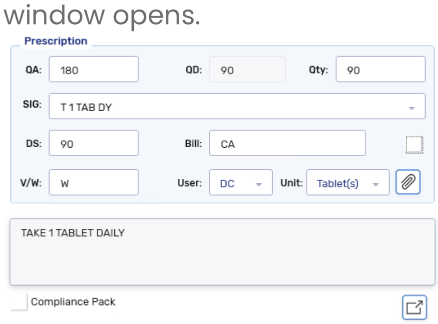
Discontinuing a Prescription Automatically from Propel Rx

A prescription can be automatically aborted on the DIS by setting a Stop Date. On the Stop Date, the prescription is discontinued in Propel Rx, and an Abort message is sent to the DIS with the author being the first user who logs in.

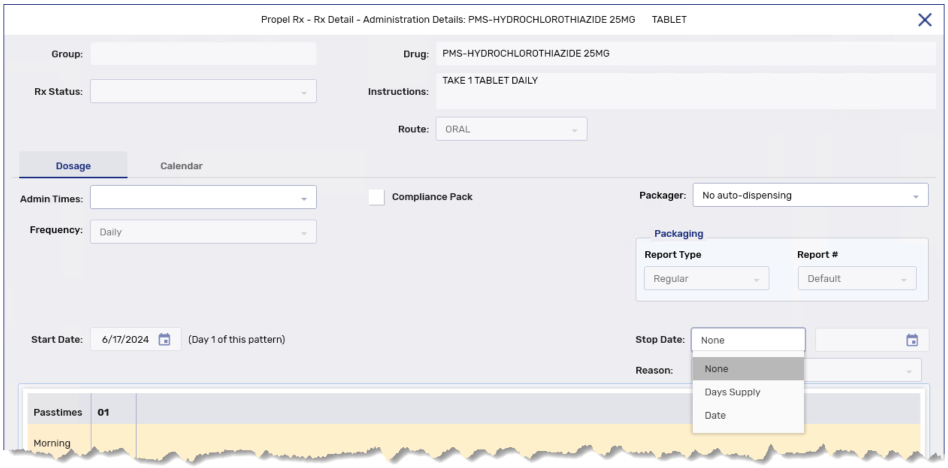
NOTE: If a Detected Issue is returned for the prescription's discontinuation, the transaction appears in the EHR Queue tile for management. The prescription's status remains unchanged until the transaction is sent to the DIS.

To set a Stop Date for a prescription:

1. Do one of the following:
    - If the prescription is incomplete, process it until it reaches Rx Detail.
    - If the prescription is complete, Amend it to open Rx Detail.
2. Select the expander button next to the Compliance Pack checkbox. The **Administration Details** window opens.



3. Dropdown the **Stop Date** field and select one of the following options:
    - **Days Supply** – prescription is inactivated once the days supply has elapsed.
    - **Date** – prescription is inactivated on the specified date.



4. Dropdown the **Reason** field and select an appropriate reason.
5. Select **OK**.

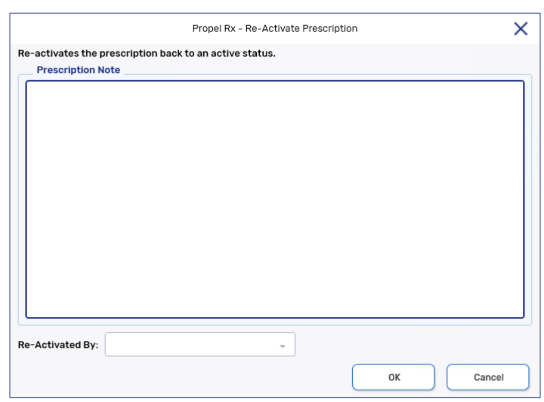
Reactivating an Inactivated or Suspended Prescription from Propel Rx

When a prescription is inactivated or suspended, no messages are transmitted to the DIS. If you need to reactivate the prescription, you can do so locally.

NOTE: For suspended prescriptions, if a resume date was specified when the prescription was suspended, the prescription will be automatically reactivated on the chosen date. However, you can still manually resume the prescription earlier if needed.

To reactivate an inactivated or suspended prescription from Propel Rx:

1. Open the **Patient Folder**.
2. Select the **Profile** tab.
3. Select the **Active** checkbox for the prescription that needs to be resumed.
4. The Re-Activate Prescription window opens. Dropdown the **Reason** field and select the appropriate option.
5. *Optional*: Enter any notes for the reactivation.
6. *Optional*: Select who (i.e., Agent, Patient, Provider) initiated the reactivation process.
7. Select **OK**.



The following updates are performed in Propel Rx:

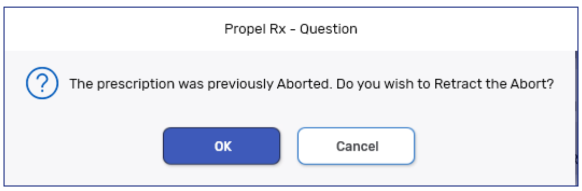
- The prescription is flagged as Active on the Patient Profile.
- A row is added to the Patient Folder History tab for the reactivation.

Reactivating a Discontinued Prescription from Propel Rx

If a prescription is discontinued in error or stopped in between refills (e.g., narcotics), you can reactivate the prescription. When a discontinued prescription is reactivated, a Retract message is transmitted to the DIS, and the prescription's state (e.g., refills, quantity authorized, Rx ID) prior to the discontinuation is restored locally and on the DIS. A retract can only be done if the discontinuation was performed by your pharmacy and no other activity has been completed against this transaction.

To reactivate a discontinued prescription from Propel Rx:

1. Open the **Patient Folder**.
2. Select the **Profile** tab.
3. Select the **Active** checkbox for the prescription that needs to be resumed. A prompt asks you to confirm the action.



4. Select **OK**.

A processing message displays for the resume and closes upon successful completion of the message to the DIS. The following updates are performed in Propel Rx:

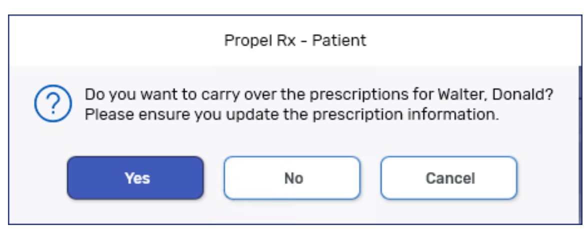
- The prescription is flagged as Active on the Patient Profile.
- A row is added to the Patient Folder History tab for the reactivation.
- In the Audit History, any indications that the prescription was discontinued are removed.

If a Detected Issue is returned by the DIS, appropriate action must be taken before the prescription's status is changed locally and on the DIS.

NOTE: If the Abort message is still in the EHR Queue, the Retract message is queued as well. These messages will send in chronological order once initiated from the EHR Queue.

Inactivating Prescriptions for Group Patients

When adding a patient to a group or moving them in between groups, a prompt appears with the option to carry over the prescriptions for the patient. If No is selected, the prescriptions will be inactivated on the patient's Profile. On the DIS, the prescriptions' statuses will remain unchanged.



Transferring a Prescription

In Propel Rx, a national database of pharmacies is preloaded. These records can be used when transferring a prescription.

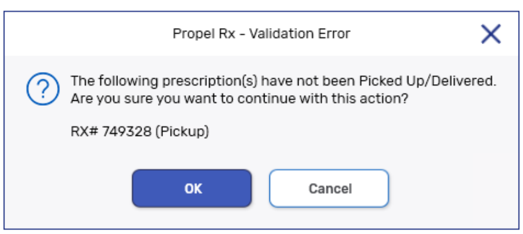
Transferring In a Prescription

The Transfer In function allows you to manually record details of a prescription that was transferred to your pharmacy. Transferring in a prescription is like filling a normal prescription except you enter transfer in details in Rx Detail. For more information, refer to the [Propel Rx Online Help](#).

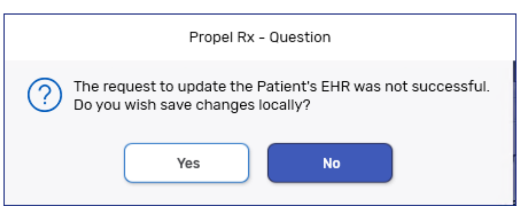
Transferring Out a Prescription

The Transfer Out function is used to transfer the ownership of a prescription from your pharmacy to another pharmacy. When a DIS prescription is transferred, the original prescription order is aborted on the DIS Profile with a stop reason related to the transfer function. A new prescription order for the remaining quantity can then be created at another pharmacy. For more information, refer to the [Propel Rx Online Help](#).

You cannot transfer a prescription if it has not completed Workflow. If a prescription is Waiting for Pick Up/Delivery, a warning prompt asks if you want to continue with the transfer.



If a Detected Issue is returned by the DIS (e.g., prescription status is already aborted), you will be given an option to save the changes locally.



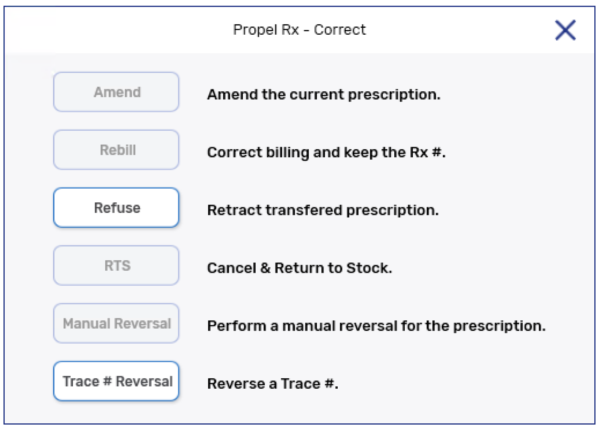
- **Yes** – marks the prescription as Transferred locally and sets the refills to zero. The prescription's status on the DIS remains unchanged.
- **No** – cancels the transfer process and no change is made to the prescription locally or on the DIS.

Cancelling a Transfer Out

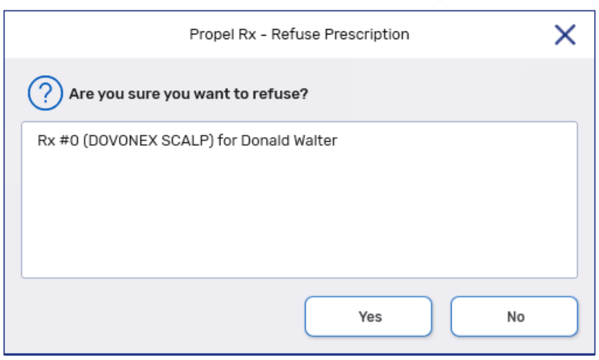
If a prescription was transferred out in error, the transfer can be cancelled. When this action is performed, the prescription repeats are restored in Propel Rx and a Retract message is sent to the DIS to reactivate the prescription.

To cancel a transfer out:

1. Open the **Patient Folder**.
2. Select the **Profile** tab.
3. Highlight the transferred out prescription.
4. Select **Correct**. The Correct window opens.



5. Select **Refuse**. The Refuse Prescription window opens.



6. Select **Yes**.

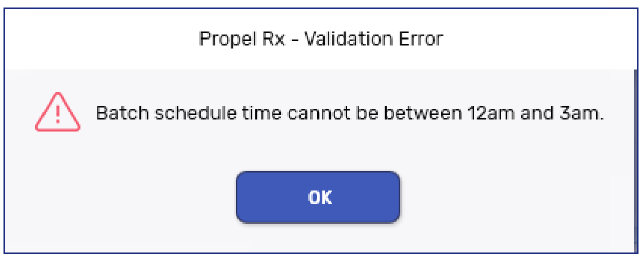
The following updates are performed in Propel Rx:

- The status of the prescription is updated locally from Transferred (TRN) to the previous status prior to the transfer.
- The repeats are restored on the prescription.

Batch Processing

Batching allows prescriptions to be dispensed as a group and processed without direct user intervention. Batching can be performed for compliance and regular retail prescriptions. A user does not need to be actively logged into Propel Rx, nor does Propel Rx need to be opened when a batch is processed. The user scheduling the batch will be used as the author of the transactions submitted to the DIS. If a Detected Issue is returned or a Third Party rejects the claim, the user who manually intervenes to complete the prescription will be sent as the author. CPS must be running for prescriptions in the batch to adjudicate to Third Parties.

NOTE: As the DIS is down for maintenance from 12am to 3am, a prompt will appear if you attempt to schedule a batch during this timeframe. You must choose a different time to proceed with the scheduling process.

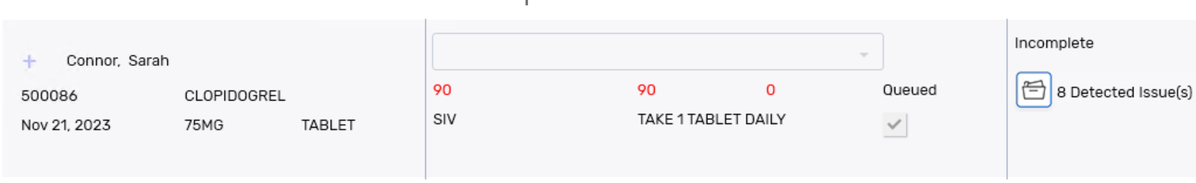


Viewing Detected Issues from a Batch

Any Detected Issues returned for a batch are visible from the Detected Issue(s) folder within the Batch Profile window.

To view Detected Issues from a batch:

1. Open the Batch Profile using one of the following methods:
   - On the left navigation menu, select the **Batch Manager** navigator button . In the Batch History tab, highlight the batch and select **Detail**.
   - Highlight a batched prescription from the Workbench and then select **Rx** > **Batch**.
2. Select the folder button beside the **Detected Issue(s)** field on the prescription row. The Detected Issues Maintenance window opens.



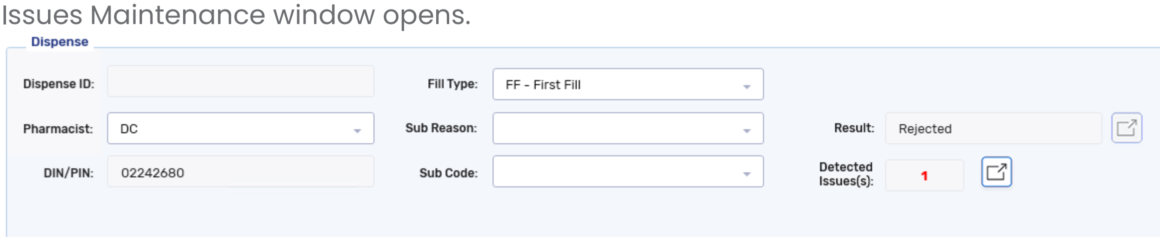
3. Double-click on a row. The Detected Issue Events window opens displaying additional information about the Detected Issue, if any.
    - If the prescription status in the Batch Profile window is:
        - **Incomplete**, **Rejected**, or **Failed** – you must resolve the issue. Once done, select the **Submit** button in the Batch Profile window to resubmit the prescription for processing. For more information, see Resolving Detected Issues from a Batch.
        - **Complete** – the prescription was successfully processed.

Resolving Detected Issues from a Batch

Detected Issues can be managed by detailing the prescriptions from the Batch Profile window.

Resolving Detected Issues from Rx Detail

1. Open the Batch Profile window using one of the following methods:
    - On the left navigation menu, select the **Batch Manager** navigator button . In the Batch History tab, highlight the batch and select **Detail**.
    - Highlight a batched prescription from the Workbench and then select **Rx** > **Batch**.
2. Highlight the applicable prescription(s).
3. Select **Detail**. The prescription opens in Rx Detail.
4. In the **EHR** tab, select the expander button beside the **Detected Issue(s)** field. The Detected Issues Maintenance window opens.



5. Review the Detected Issue(s). Correct the necessary data from Rx Detail. This may require rebilling the prescription. Select **OK** once done.
6. If more than one prescription was detailed, the next one loads in Rx Detail. Repeat steps 4 – 5 for the remaining prescriptions.
7. In the Batch Profile window, highlight the prescriptions whose Detected Issues were resolved and then select **Submit**. The prescriptions will be submitted to the DIS and adjudicated.

Processing a Batch for Non-Synchronized Patients

Prescriptions for non-synchronized patients cannot be processed in a batch unless the patient has a non-EHR patient status.

The following options are available for synchronizing the patient:

- Detail the prescription and synchronize the patient from the Patient Folder in Rx Detail.
- Synchronize the patient from the Patient Folder and resubmit the prescription within the batch.

Synchronizing a Patient from the Batch Profile

1. Open the Batch Profile window using one of the following methods:
    - On the left navigation menu, select the **Batch Manager** navigator button . In the Batch History tab, highlight the batch and select **Detail**.
    - Highlight a batched prescription from the Workbench and then select **Rx** > **Batch**.
2. Highlight a prescription for the non-synchronized patient.
3. Select **Detail**. The prescription opens in Rx Detail.
4. Select the folder button in the Patient section. The Patient Folder opens.
5. Synchronize the patient. For more information, refer to Synchronization Scenarios.
6. In the Batch Profile window, highlight the prescription(s) for the newly synchronized patient.
7. Select **Submit**. The prescriptions will be submitted to the DIS and adjudicated.

Synchronizing the Patient and Resubmitting the Batch

1. Select the Patient navigator button on the left menu.
2. Search for and select the non-synchronized patient.
3. Synchronize the patient. For more information, refer to Synchronization Scenarios.
4. Open the Batch Profile window using one of the following methods:
    - On the left navigation menu, select the **Batch Manager** navigator button . In the Batch History tab, highlight the batch and select **Detail**.
    - Highlight a batched prescription from the Workbench and then select **Rx** > **Batch**.
5. Highlight the prescription(s) for the newly synchronized patient.
6. Select **Submit**. The prescriptions will be submitted to the DIS and adjudicated.

Processing a Batch When the Network is Down

If the DIS Network is down when a batch is processed, the first prescription that fails to transmit to the DIS is added to the EHR Queue. Even though the prescription wasn't accepted by the DIS, it will still adjudicate to Third Parties according to its billing codes. The same process will occur for all subsequent prescriptions in the batch. Once the Network is restored, the prescriptions can be resent to the DIS from the EHR Queue. For more information, see Sending Transactions When the Network is Restored.

Patient Centre

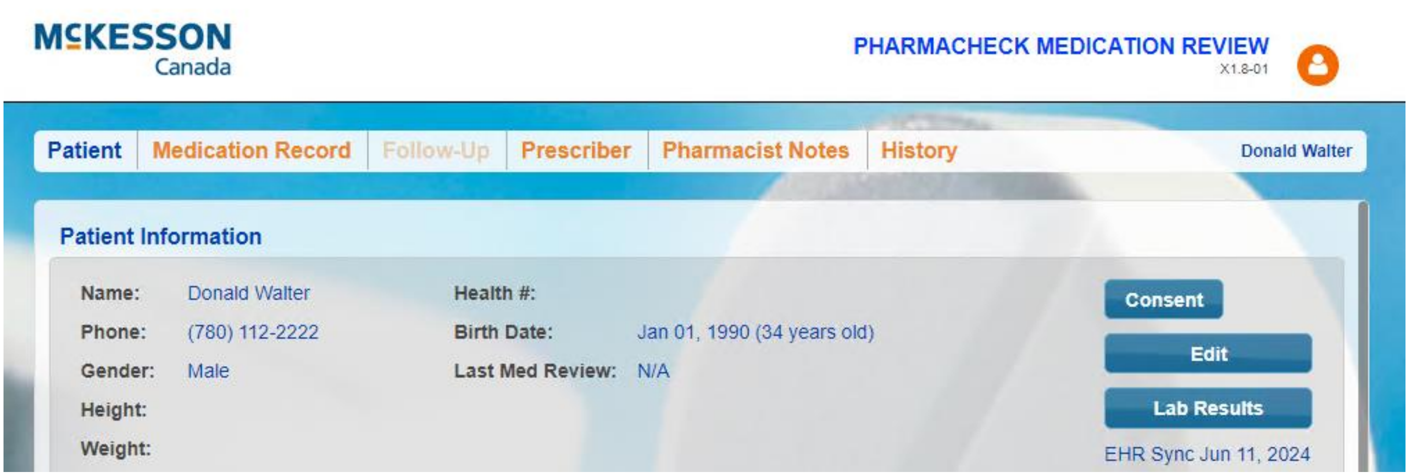
Patient Centre is a companion application for Propel Rx that allows pharmacies to efficiently manage patient-focused services (PFS). If a claim can be billed for a PFS (i.e., Medication Review), a prescription is written back to Propel Rx and auto-processed. All PFS prescriptions without a true DIN/NPN will bypass the DIS (i.e., EHR Type = Non-EHR).

Medication Review

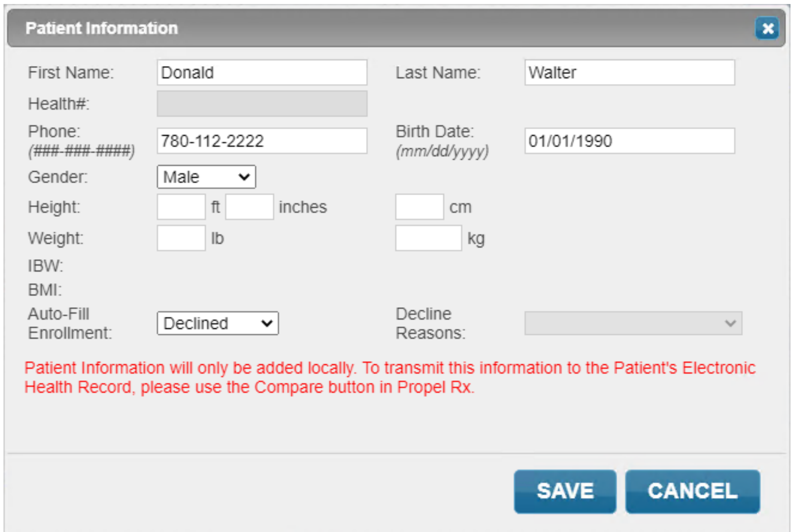
A Medication Review in Patient Centre is divided amongst several tabs to facilitate the documentation of various components in a review. With DIS integration, some information is read-only in Patient Centre, while others can be updated but not transmitted automatically to the DIS.

Patient Tab

In the Patient tab, underneath the Lab Results button, the date that the patient was synchronized with the Client Registry (CR) is indicated. If the patient is not synced, this information is not displayed.



When a patient is synced, the PHN is read-only in the Patient tab. If you update the demographic information from Patient Centre using the Edit button, this information is written back to Propel Rx but not transmitted to the CR. To transmit the information to the CR, a Patient Compare must be performed in Propel Rx.



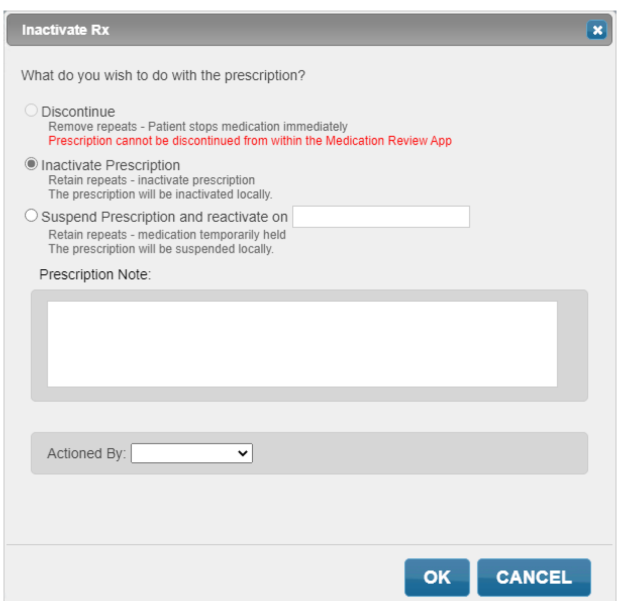
Medication Record Tab

Smarter & Faster

REVIEWING A PATIENT'S MEDICATION PROFILE

It is highly recommended that you view the DIS Profile prior to beginning a medication review to familiarize yourself with all the patient's medications. Only prescriptions that are found locally in Propel Rx are displayed in Patient Centre.

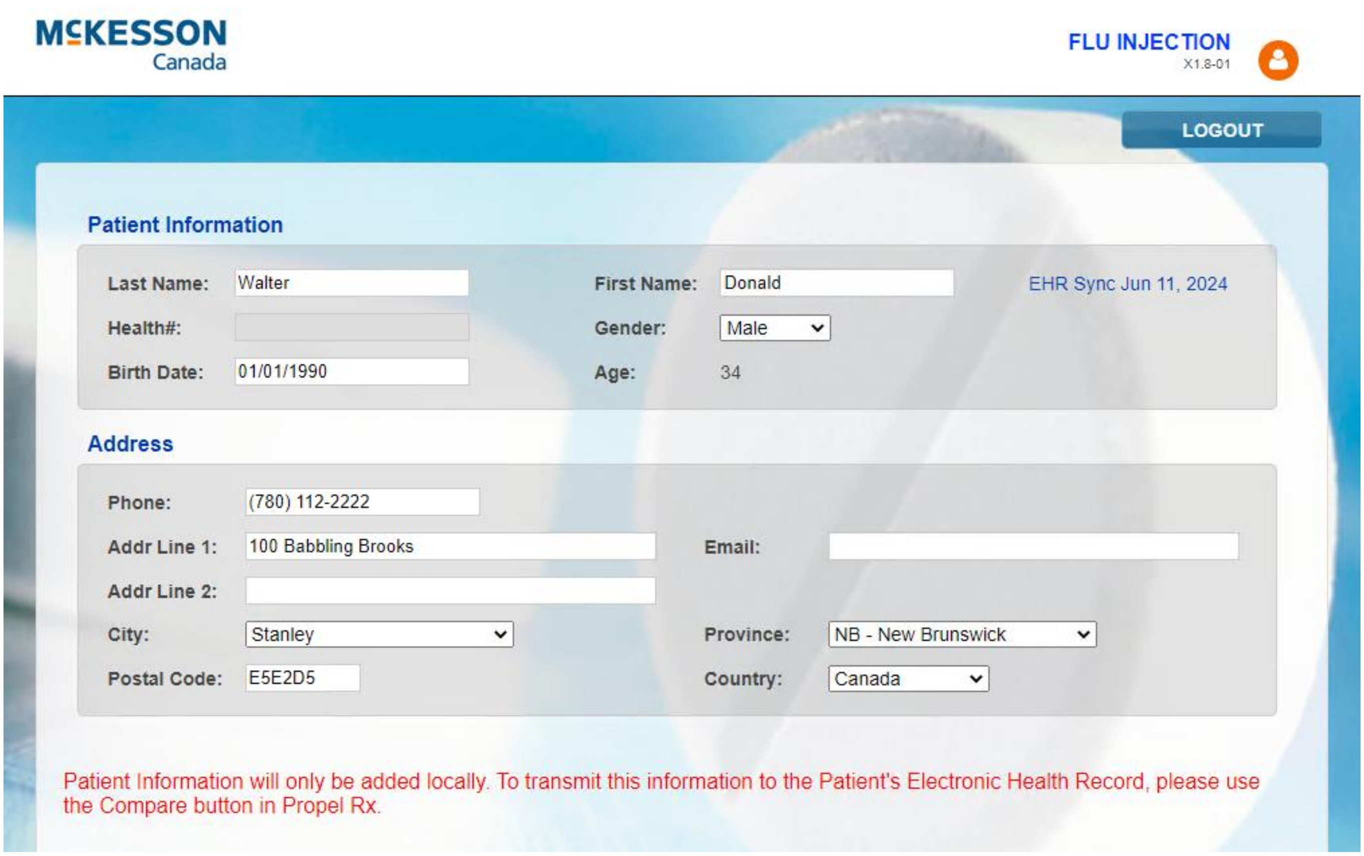
If a prescription needs to be discontinued, you must do so from Propel Rx, as the feature is not available from Patient Centre for New Brunswick pharmacies. Prescriptions may be inactivated or suspended from Patient Centre and these changes will write back to Propel Rx but remain local only (i.e., not transmitted to the DIS).



Flu Module

The Flu Consent module in Patient Centre is used to document patient consent electronically for flu injection prescriptions. Like the Medication Review module:

- The EHR Sync date is indicated in the Patient Information section if the patient is synced.
- The PHN is read-only for synced patients.
- Updates to demographic information are written back to Propel Rx but not transmitted to the CR. To transmit the information to the EHR, a Patient Compare must be performed in Propel Rx.



If a patient is created from the Flu Consent module, a corresponding unsynced Patient Folder will be created in Propel Rx. You must sync the patient from Propel Rx using the steps outlined in Synchronization Scenarios before you can process any prescriptions for them.

Detected Issues

In Propel Rx, local interaction checking is performed using an integrated drug information database when a prescription is processed. In addition to local interaction checking, issue detection is also performed by the DIS. Issues detected by the DIS can include DIS business rule violations or discrepancies with submitted information.

DIS issue detection occurs when:

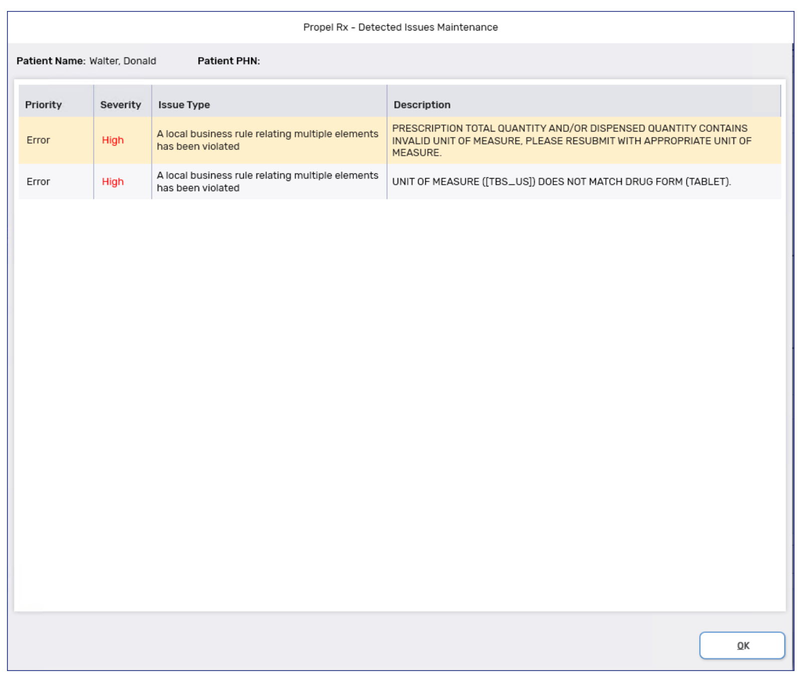
- Searching for a patient in the Client Registry (CR).
- Updating a patient's demographic information on the CR.
- Adding a patient to the CR.
- Transmitting the dispense of a prescription to the DIS.
- Refusing a prescription that was transmitted to the DIS.
- Discontinuing a prescription or retracting the discontinuation of a prescription that was transmitted to the DIS.

Viewing Detected Issues

If a Detected Issue is returned with a message response, Propel Rx displays the details within the Detected Issues Maintenance window. This allows you to view issues on an ongoing basis and action them appropriately.

Once a Detected Issue has been reviewed, it can be viewed again later. To view a Detected Issue later:

1. Open the **Patient Folder**.
2. Select the **Profile** tab.
3. Select the prescription you want to view Detected Issues for.
4. Select **Detail**. The prescription opens in Rx Detail.
5. Select the **EHR** tab.
6. In the **Dispense** section, select the expander button beside the Detected Issue(s) field to view the Detected Issues. The Detected Issues Maintenance window opens.



Common Detected Issues

It is important that you pay special attention to any Detected Issues that may arise and resolve the issues accordingly. See below for some common Detected Issues.

No Patient Found with Identifier Provided

This error appears when your pharmacy has previously synchronized the patient record in the CR and DIS but following the original synchronization, the pharmacy record was merged into a duplicate patient record in Propel Rx (thus merged in CR and DIS) or the patient record was inactivated, and the patient type was updated to Non-Human (which resulted in the record being inactivated in CR and DIS).

To resolve this Detected Issue:

1. Nullify the Patient Folder.
2. Create a new Patient Folder and sync it to the CR.
3. Merge the two Patient Folders. Keep the new Patient Folder and remove the nullified one.
4. Fill the prescription again on the remaining Patient Folder.

Priority	Severity	Issue Type	Description
Error	Unknown	A local business rule relating multiple elements has been violated	AN ERROR OCCURRED - ERROR DETAILS: NO PATIENT FOUND WITH IDENTIFIER PROVIDED.

Prescriber Not Found or Terminated

This error appears when the prescriber is not recognized. To resolve this Detected Issue, verify the prescriber from the original prescription. If the wrong prescriber was entered in the prescription, escape the prescription, and resubmit it with the appropriate prescriber. If the prescriber was correct, validate the **Status**, **Prescriber Type**, **Role Type**, **NB Type**, and **License #** fields are entered correctly in the Prescriber Folder.

Priority	Severity	Issue Type	Description
Error	High	A local business rule relating multiple elements has been violated	PRESCRIBER NOT FOUND OR TERMINATED

Provider Submitted as the Author Not Recognized

This error appears when the pharmacist is logged into Propel Rx as the pharmacist on duty and their license number is entered incorrectly. To resolve this Detected Issue, log into Propel Rx as the pharmacist user and select **More** (**...**) > **Security**. Correct the license number for the pharmacist user in the Security window and resubmit the prescription.

Priority	Severity	Issue Type	Description
Error	Unknown	A local business rule relating multiple elements has been violated	AN ERROR OCCURRED - ERROR DETAILS: PROVIDER SUBMITTED AS THE AUTHOR WAS NOT RECOGNIZED (ID -1).

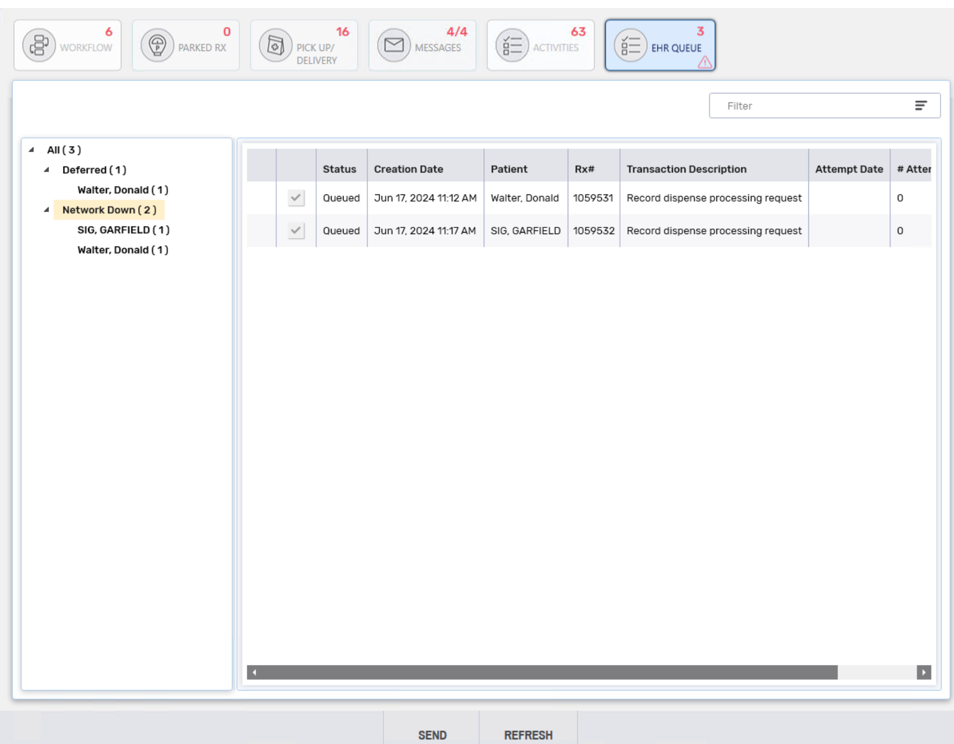
EHR Queue Tile

The purpose of an EHR Queue is to allow you to continue to service your patients and process prescriptions even if the DIS is temporarily unavailable. This tile manages any queueable transactions that could not be processed due to DIS Network unavailability.

One of the main advantages of the EHR Queue is there is no interruption of service to your patients when the DIS is unavailable. Prescriptions are successfully adjudicated, and a label set with correct pricing information is printed.

ALERT: Each pharmacy is responsible for ensuring that any failed or rejected EHR Queue transactions are resolved each day.

When DIS is down, transactions are queued in order of creation. If a patient has any EHR Queued transactions, then all subsequent transactions are queued and processed in order. No new transactions for a particular patient can be sent to the DIS until all queued transactions for that patient have been sent. This is because a prior queued transaction may have an impact on the results of another transaction that is sent down.



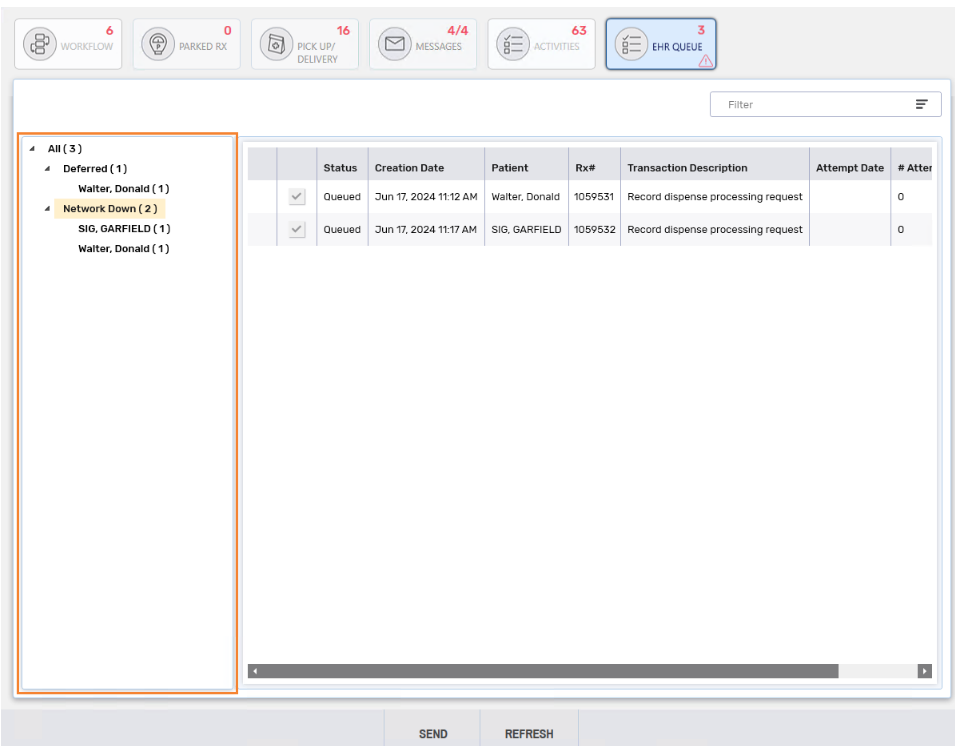
The EHR Queue tile displays a counter which indicates how many transactions reside in the EHR Queue. Within the tile, there are two sections: a transaction summary tree view and a detailed view of the queued transactions. The background colour of the text changes to yellow when the focus has been placed on that view.

Transaction Summary View

The Transaction Summary tree view is the left section of the EHR Queue tile. This section lists all EHR Queue transactions which can be expanded or collapsed to view the following:

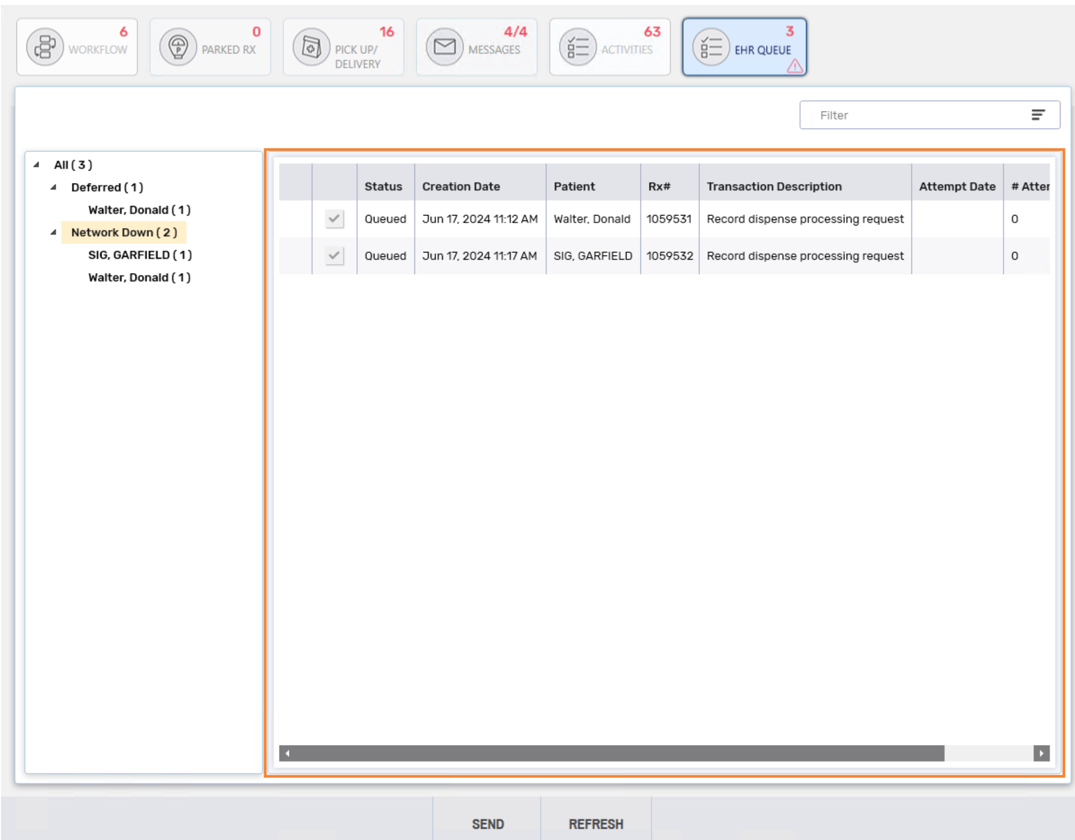
- **All transactions** – displays all transactions in the EHR Queue. This is a read-only view. To action a transaction, a queue type (i.e., Deferred, Network Down) or patient must be selected.
- **Deferred** – displays all transactions that were deferred for DIS submission.
- **Network Down** – displays all transactions that were added to the EHR Queue due to the DIS Network being unavailable/unreachable.
- **Patient** – displays all transactions for the patient in the EHR Queue that were either Deferred or added due to a Network Down scenario.

Transactions are organized by creation date in ascending order (oldest at the top). A counter beside each row indicates the number of transactions for that type or patient.



Detailed Transactions View

The Detailed Transactions view is the section to the right of the EHR Queue tile. The Detailed Transactions view lists all the DIS transactions that have been queued for a selected patient or queue type. Each row represents a detailed view for each transaction.



Refer to the table below for a description of each column in the Detailed Transactions grid.

Column	Description
Issues/Errors	• A folder button allows you to view the details of the issue or error when a transaction has a status of Failed or Rejected. • Selecting this button displays the Detected Issues Maintenance window for Rejected transactions or a message prompt for Failed transactions. • If the Patient Folder is not synced to the Client Registry (CR), the folder button is outlined in red. When selected, it opens the Patient Folder for you to sync the patient. No transactions can be sent for a patient until they are synced.
Checkbox	• The checkbox indicates which transactions are selected for sending.

	• If multiple transactions are associated with a prescription (e.g., Dispense, Abort), upon selecting the checkbox for one transaction, the other transactions are automatically selected. Similarly, if the checkbox is deselected for a transaction, all associated transactions are also deselected. • For Deferred prescriptions, the checkboxes are defaulted OFF and editable. For Network Down transactions, the checkboxes are ON and disabled. This is a safeguard to prevent transactions from being sent to the DIS in the wrong order.
Status	• The current transmission status of the EHR Queued transaction. ○ ***Queued*** – Message is waiting to be sent. ○ ***Started*** – Message is currently being sent. ○ ***Rejected*** – Message was rejected by the DIS with Detected Issues. You must attempt to resolve the Issue(s). ○ ***Failed (Network still down)*** – Message transmitted unsuccessfully after a predefined number of attempts. ○ ***Not Sync*** – Patient is not synchronized with the CR. ○ ***Deferred*** – Message was Deferred and has not yet been sent.
Creation Date	• The date and time that the EHR Queued transaction was originally created.
Patient	• The name of the patient with EHR Queued transactions.
Rx #	• The prescription number for the transaction.
Transaction Description	• The EHR Queued transaction description.
Attempt Date	• The actual date and time that the transaction was submitted.
# Attempts	• When the EHR Queued transaction is submitted, a counter keeps track of the total number of attempts and the current attempt number.
Initials	• Each EHR Queued transaction has a user associated with it. This is the actual user that created the DIS transaction.

EHR Queue Buttons/Fields

Certain action buttons will be visible to help manage the EHR Queue.

Button	Description
Abandon	• Allows you to remove a transaction from the EHR Queue. This button should only be used if every option has been exhausted to correct the prescription. • The Abandon button is enabled if the selected transaction has an EHR Queue status of Rejected or Failed. • If a Detected Issue is returned that cannot be resolved, a prompt appears upon sending the transaction which provides the option to abandon the transaction. • A reason must be entered for abandoning a transaction. This is recorded in the Patient Folder History tab. • Any associated transactions (e.g., Abort, Retract) are also abandoned. • If a prescription must be abandoned, ensure you refuse and resubmit the prescription.
Detail	• Opens Rx Detail as read-only. No changes can be made from this view. • Dispense transactions can be detailed. • If changes must be made, open the applicable folder (e.g., Patient, Prescriber, Drug) to make the necessary changes.
Refuse	• Refuses the **highlighted** prescription. If a dispense is queued, the reversal will be sent once the dispense has been transmitted. • The order that transactions are sent are based on the creation date and the timestamp. If one transaction fails, downstream associated transactions are not sent.
Send	• Sends the **checkmarked** transactions to the DIS. • Selecting Send transitions the status of the first EHR Queued transaction to Queued for the patient or queue type. For the Network Down queue, all transactions are selected automatically and must be sent. • Transactions are sent in order by creation date. A prompt will indicate how many transactions were successfully sent. • The # Attempts counter is reset. • After 5 failed attempts, a prompt appears indicating the number of transactions that have been cancelled, rejected, or abandoned. These transactions remain in the EHR Queue. • If a Detected Issue is returned for a transaction, it must be resolved and sent successfully before the next selected transaction is sent. Similarly, if the Network is still down when a transaction is sent, a prompt indicates this, and the remaining selected transactions are not sent.
Refresh	• Refreshes the EHR Queue view.

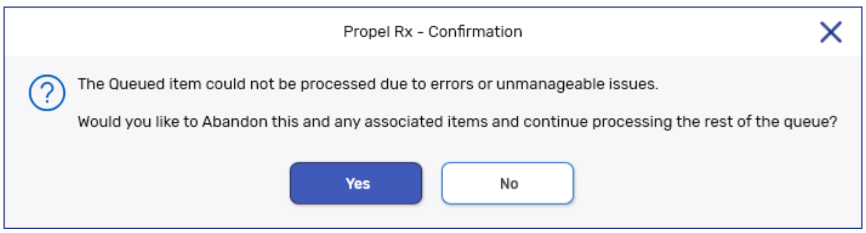
Abandoning a Transaction

An Abandon button is available in the EHR Queue. By selecting the Abandon button, you can remove the transaction from the EHR Queue. This button may be required if, for whatever reason, the transaction cannot be corrected and submitted to the DIS through the normal process. Only Rejected or Failed transactions can be abandoned.

To abandon a transaction:

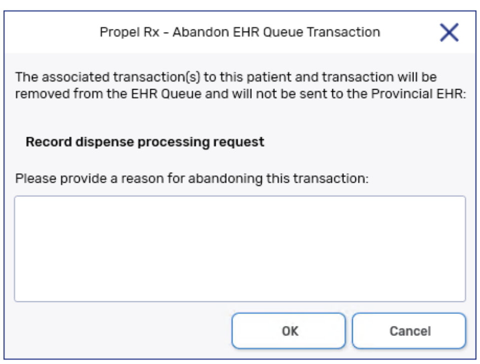
1. Highlight the transaction(s) in the **EHR Queue** tile.
2. Select **Abandon**. The Abandon EHR Queue Transaction window opens.

NOTE: If a Detected Issue is returned that cannot be resolved when sending transactions from the EHR Queue, a prompt gives you the option to abandon the transaction.



- If **Yes** is selected, the Abandon EHR Queue Transaction window opens.
- If **No** is selected, you are returned to the EHR Queue tile and any remaining selected transactions from the EHR Queue are not sent.

3. Enter a reason for abandoning the transaction. This entry will be recorded in the **Patient Folder History** tab in the **Comments** column.



4. Select **OK**.

ALERT: When the Abandon button is used, you may create mismatches in data between Propel Rx and the DIS. It is your pharmacy's responsibility to update your local records and/or the DIS to maintain accurate data. This can include correcting a prescription, updating the status of a prescription, etc.

DIS Network is Unavailable

When a transaction fails to send to the DIS, Propel Rx attempts to resend. After a maximum number of retries, the following prompt appears, and the transaction is placed in the EHR Queue:

If a patient has a transaction in the EHR Queue, a blue **Q** indicator appears in the following locations:

- Patient Folder information bar beside the patient name
- On the Rx Detail EHR tab if the transaction was for a prescription

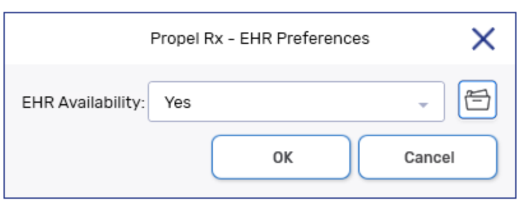
If the Network is unavailable, you have the following options:

- Set the EHR Availability to No
- Continue Filling Prescriptions
- Stop Filling Prescriptions
- Park Prescriptions

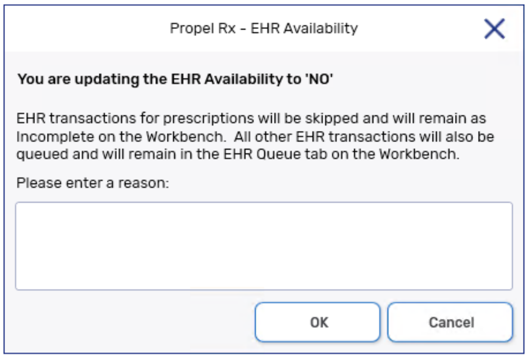
Set the EHR Availability to No

If the DIS Network is down for an extended period, you may choose to set the EHR Availability to No. When the EHR Availability is changed, the EHR Availability window prompts you to enter a reason for changing this preference.

1. Select **More** (...) > **New Brunswick** > **EHR Preferences**.



2. Select **No** from the EHR Availability dropdown list. The EHR Availability window opens.
3. Enter the reason for changing the EHR Availability. The reason can be viewed later by selecting the folder button in the EHR Preferences window.



4. Select **OK**.

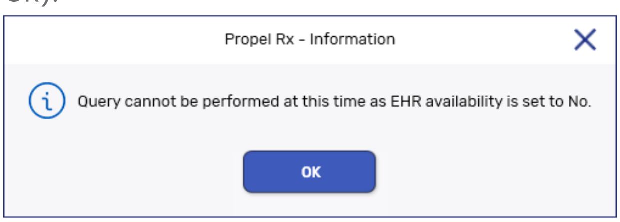
When the EHR Availability is set to No, the following occurs:

- An offline indicator appears on the EHR Queue tile.
- Any queueable transactions are automatically added to the EHR Queue tile and sorted in ascending order (oldest at the top).

NOTE: The following transactions can be queued in the EHR Queue tile:

- Discontinuing a prescription
- Dispensing a prescription
- Refusing a prescription
- Adding a patient to the CR
- Editing patient demographic information in the CR
- Merging patients (if both patients are synced)
- Nullifying a patient

- The following prompt appears when you attempt to perform a query (e.g., patient search in the CR):

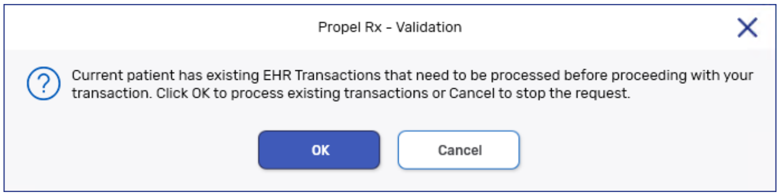


Continue Filling Prescriptions

When the connection to the DIS is lost or the Network is down, you can continue to fill prescriptions and attempt to connect to the DIS with each transaction (i.e., leave the EHR Availability as Yes). Labels will print with the appropriate pricing and dosing information.

When a transaction fails to send to the DIS, subsequent transactions for the same patient are automatically placed in the EHR Queue. Propel Rx does not attempt to connect to the DIS again until a prescription is filled for a different patient, or another prescription is filled for the same patient after a break in service (e.g., navigate to another Profile and return).

If transactions already exist in the EHR Queue for the patient, upon attempting to send another transaction, the following prompt appears:



- Select **OK** to process the existing transactions in chronological order. A prompt indicates how many transactions were successfully sent. If the Network is still down, a prompt appears advising this.
- Select **Cancel** to not send the transactions, including the current transaction, to the DIS.

Stop Filling Prescriptions

You may choose to stop filling prescriptions until the connection to the DIS is restored (i.e., ask the patient to wait until the connection is restored).

Park Prescriptions

You may choose to fill a prescription until it reaches **Rx Detail** and then select **Park**. The prescription is then moved to the Parked Rx tile on the Workbench. At this point, the label cannot be printed.

When the Network is restored, the prescription can be processed from the Parked Rx tile and submitted to the DIS and Third Parties for payment. The label set can then be printed to be filed with the prescription.

Sending Transactions When the Network is Restored

When the DIS Network is restored, you can upload the transactions from the EHR Queue.

TIP: Open another instance of Propel Rx to send queued transactions so you can continue to fill prescriptions on your current session.

To send EHR Queued transactions:

1. Select the **EHR Queue** tile on the Workbench.
2. Select the applicable row from the tree view on the left.
    - If you want to send all Deferred or Network Down transactions, select the **Deferred** or **Network Down** row.
    - If you want to send transactions for a specific patient, select the applicable patient row.
3. On the Detailed Transaction view to the right, select the checkboxes for the transactions you wish to send.

NOTE: Network Down transactions are automatically selected for sending from the Network Down queue. This is to ensure the transactions are sent in the appropriate order.

4. Select **Send**.

   Propel Rx sends the transactions in order by creation date.
   - If a Detected Issue is returned for a transaction, it must be resolved before subsequent transactions can be sent. If the Detected Issue is unresolvable, a prompt gives you the option to abandon the transaction.
   - If a transaction fails to send after 5 attempts, a prompt appears indicating the number of transactions that were cancelled, rejected, or abandoned. These transactions remain in the EHR Queue.
   - The number of successful transactions that were sent are returned in a prompt.

Resolving Transactions in the EHR Queue

When a transaction is not successfully transmitted to the DIS, the transaction remains in the EHR Queue tile, and the status will be one of the following:

- **Failed** – the DIS network was unavailable.
- **Rejected** – the transaction was rejected due to an error that must be resolved prior to resubmission.
- **Deferred** – prescription was selected to temporarily bypass the DIS and has yet to be submitted.
- **Queued** – transaction is waiting to connect to the DIS Network to be sent.

To resolve a transaction in the EHR Queue:

1. From the Workbench, select the **EHR Queue** tile.
2. Select the folder button next to the transaction you wish to view. The Detected Issues Maintenance window appears with the error.
3. Resolve the error. Refer to the table below for more information on how to action different issues/statuses in the EHR Queue.

What is the issue/status of the transaction?	What does it mean?	What actions should I take?
Not Sync	The Patient Folder is not synced to the CR.	Select the red folder button to open the Patient Folder and then proceed to synchronize the patient. Once synced, the transactions in the queue change to a Queued status.

Queued	The message is waiting to be sent.	Propel Rx sends the transactions in the appropriate order if more than one is being submitted. No action is required now.
Failed	The message was sent to the DIS but failed or a maximum number of attempts for the message was reached.	Send the transaction once the DIS connection is restored.
Rejected	The message was rejected by the DIS with a Detected Issue.	Correct the data outlined in the issue.
Started	The message is being sent.	No action is required now.
Deferred	The prescription was Deferred in Rx Detail and has not been sent.	Send the transaction.

4. Ensure the checkbox for the transaction is selected.
5. Select **Send**.
6. **Refresh** the **EHR Queue** tile and check that the transaction is no longer there.

Reports

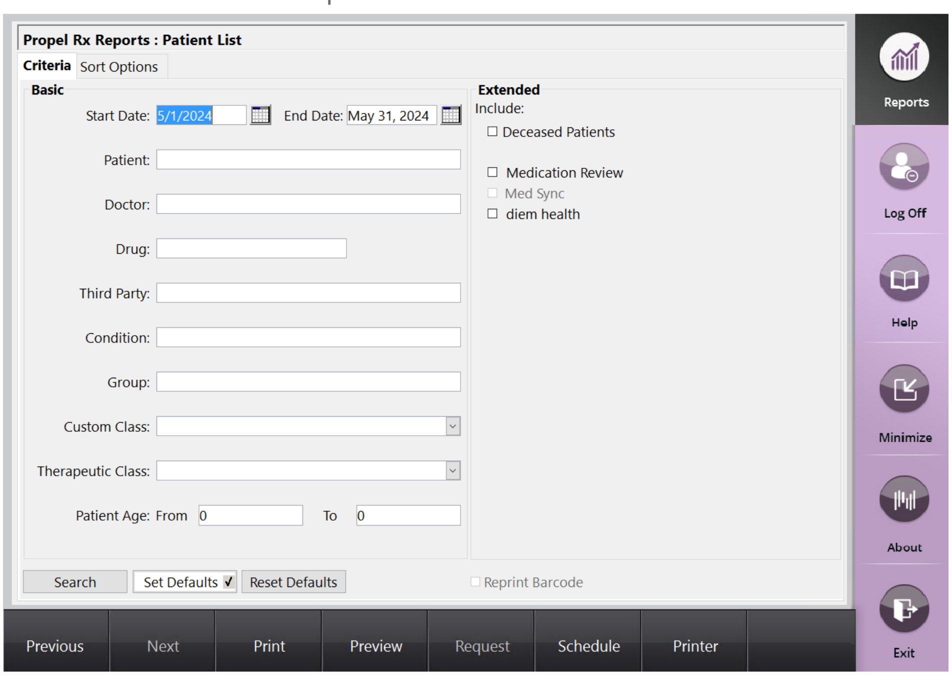
Propel Rx permits you to run reports that can assist you with managing your patients. Not all users have access to run these reports. See Setting Up Report Access for more information.

Patient List Report

You can generate the Patient List report to view all your patients that currently do not have a PHN on file. For more information on the Patient List report, refer to the Propel Rx Online Help.

To run the Patient List report:

1. Select **More** (...) > **Reports** > **Propel Rx Reports**.
2. Dropdown the **Patient** row from the side menu.
3. Select the **Patient List** report.



4. Specify the date range for the report by entering a **Start Date** and **End Date**. Patients who had prescriptions filled or actioned within the date range will be included.
5. Enter in any other criteria for the report.
6. Select **Preview**.

Merge

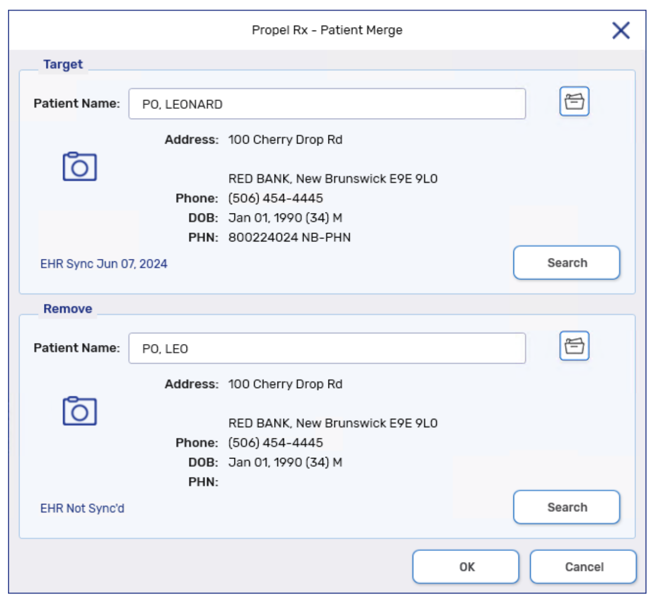
It is important to keep your Patient Folders accurate and up to date. Avoid duplicates and ensure prior to synchronizing any patients that you confirm the patient is not in Propel Rx more than once. If you have validated a patient has more than one Patient Folder, you can merge them.

Merging Patients

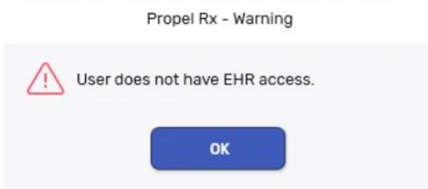
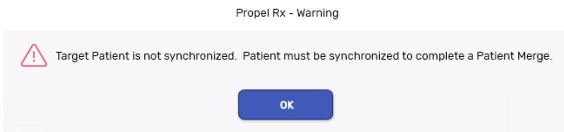
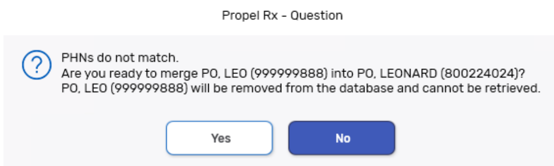
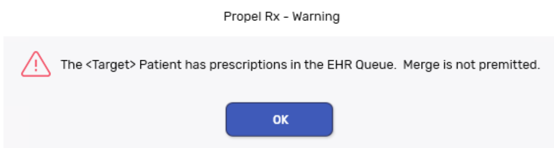
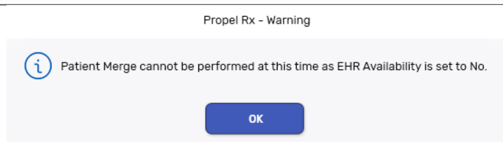
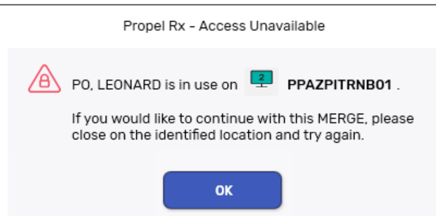
When a patient merge is performed, one Patient Folder is removed from the database and the other is retained. The Patient Folder for the patient who is retained will include all the information from the patient that was removed.

The Patient Merge window is separated into two sections: **Target** and **Remove**. **Target** contains the information for the Patient Folder that will remain and into which all other Patient Folder data will be merged. **Remove** contains the information for the Patient Folder which will be merged into the Target Patient Folder.

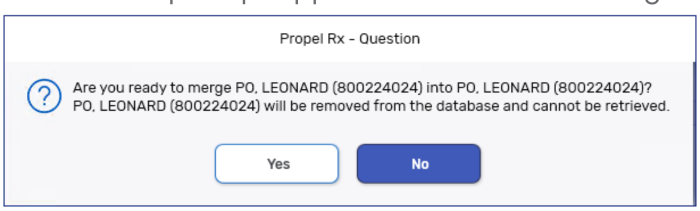
To merge two Patient Folders:



1. Select **More (...)** > **Merge** > **Patient**. The Patient Merge window opens.
2. In the **Target** section, enter all or part of the name of the patient you wish to keep.
3. Select **Search** or the folder button.
4. From the results returned, select the correct patient.
5. Select **OK**.
6. In the **Remove** section, enter all or part of the name of the patient you wish to remove from the database.
7. Select **Search** or the folder button.
8. From the results returned, select the correct patient.
9. Select **OK**.
10. Verify that the **Target** and **Remove** patients are correct and then select **OK**. Refer to the table below for prompts that may appear.

Patient Merge Validation	Description
	One or both patients are synced, and the user does not have DIS access. Set up the user with DIS access or have a different user perform the merge.
	The Target patient must be synced if the Remove patient is synced. Synchronize the Target patient and then proceed with the merge.
	The PHN of the Target patient does not match the Remove patient. You must validate why there are two different PHNs. Select Yes to proceed with the merge. Select No to abort the action.
	Transactions for the Target and/or Remove patient exist in the EHR Queue. Submit the transactions from the EHR Queue tile and then proceed with the merge.
	One or both patients are synced, and the EHR Availability is set to No. Once the EHR Network is available, turn the EHR Availability ON and then proceed with the merge.
	One or both patients are open on another workstation or instance. Close the patient on the workstation or instance indicated in the prompt and then proceed with the merge.

11. A validation prompt appears to confirm the merge. Select **Yes**.

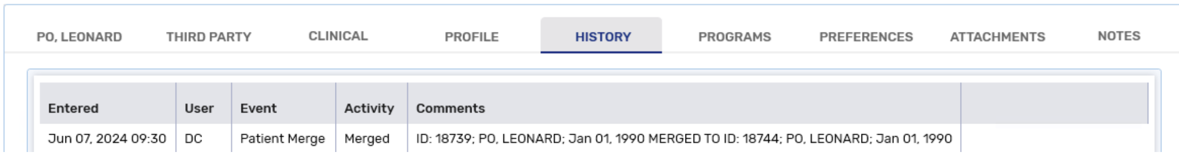


Once the merge is successful, a prompt appears indicating the merge was successful.

The following updates are made:

- The two Patient Folders are merged locally. Depending on the size of the Patient Folders, the merge can take a few minutes to complete.

- If the Target and Remove patients were synced, a Resolve Duplicates message is transmitted to the CR and DIS. If the merge is rejected by the DIS, a Detected Issue is presented, and the local patient merge is not completed.
- All information in the Remove Patient Folder is ported over to the Target Patient Folder.
- A row is added to the Patient Folder History tab indicating that a patient merge was performed. The date, time, user, and patient details are recorded.



Unmerging a Patient

If you have completed a patient merge in error, contact the PTS Customer Care team at 1-800-387-6093 option 2 and request an unmerge of the Patient Folders. You will be required to identify the target patient's name, birth date, gender, and address information. PTS Customer Care will have to notify NB DIS that an unmerge is required in CR and DIS. This is a manual process performed by CR and DIS resources, so to ensure the patient records match, this communication is very important. If one of the records was meant to be merged into another duplicate record in Propel Rx, the unmerge must be completed in DIS and CR first.

Following an unmerge, any Clinical History records entered will remain in the Target Patient Folder. When merging patients, ensure you are confident you will not need to unmerge, as any Clinical History created will remain in the Target Patient Folder.

Service New Brunswick Help Desk

If you detect an issue with the NB DIS, contact the Service New Brunswick (SNB) Help Desk immediately at 1-844-250-5250. If the SNB Help Desk cannot help you immediately without having to contact the support team, someone will get back to you. The SNB Help Desk can assist with the following:

- Questions about how to request access to the Electronic Health Record (EHR)
- Providing Temporary Passwords following requesting access to the EHR
- Issues accessing the NB Health Portal or EHR (e.g., password resets.)
- Privacy questions or concerns

You must provide the following details when you contact the Service Desk:

- Pharmacy ID # assigned upon connection to the DIS
- NB College of Pharmacists pharmacy certificate or operation number (located at the bottom of the pharmacy license displayed at your store)
- Contact name
- Contact phone number
- Description of the problem

ALERT: Personal Health Information (PHI) should never be included in an email or disclosed over the telephone to the Service Desk. Only the context of the problem being encountered should be referenced, not the specific patient data.

Helpful Links

It is important that your pharmacy is informed and up to date regarding any changes made to the New Brunswick DIS. Your pharmacy may find the following references useful:

- New Brunswick Health
- Canada Health Infoway
- Health Canada
- National Association of Pharmacy Regulatory Authorities
- Canadian Pharmacists Association
- Patented Medicine Prices Review Board

Notes

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Created December 19, 2025
Revised December 19, 2025
(98 pages)