

Job Aid

propel Rx

How To Guide on Lite Digital Workflow Setup

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Definition

Lite Workflow uses some but not all steps of Digital Workflow. This setup is useful for pharmacies that want to try Digital Workflow while using their half label sets before committing to the full version.

A screenshot of a software interface showing a vertical list of workflow steps. The steps are: Data Entry, Packaging, an empty dropdown menu, another empty dropdown menu, Pick Up, and Delivery. The 'Packaging' step is selected, indicated by a checkmark in a box to its left.

This is Lite Workflow with Packaging.

A screenshot of a software interface showing a vertical list of workflow steps. The steps are: Data Entry, an empty dropdown menu, Technical Validation, Clinical Review, Pick Up, and Delivery. The 'Technical Validation' and 'Clinical Review' steps are selected, each with a checkmark in a box to its left.

This is Lite Workflow with Technical Validation followed by Clinical Review.

A screenshot of a software interface showing a vertical list of workflow steps. The steps are: Data Entry, Clinical Review, an empty dropdown menu, Technical Validation, Pick Up, and Delivery. The 'Clinical Review' and 'Technical Validation' steps are selected, each with a checkmark in a box to its left.

This is Lite Workflow with Clinical Review followed by Technical Validation (pharmacist first model).

Features

Lite Workflow with Packaging
Scan UPCs to confirm the correct drugs were selected for packaging
Record lot numbers and expiry dates
Receive verification prompts for snap caps and double counts if Patient Preferences are on
Quickly access information about who packaged a prescription in Workflow Details and e-File copies
Reject a prescription back to Data Entry if corrections need to be made
Half labels print once Packaging is complete

Lite Workflow with Technical Validation and Clinical Review
Accessible from Propel Rx or Patient Centre (iPad compatible)
Perform the technical and clinical checks together in the same window
Perform interaction checking from Clinical Review
Set up e-signatures* to sign off on prescriptions using fingerprints or login credentials
Quickly access information about who checked a prescription in Workflow Details and e-File copies
Reject a prescription back to Data Entry if corrections need to be made
Half labels print once Data Entry is complete

*In Alberta and Manitoba, an e-signature cannot be set up due to provincial requirements.

Equipment

To purchase equipment, visit <https://portal.mckesson.ca/group/pts-portal/featured-hardware> or contact PTS Sales at 1-800-387-6093 option 5.

Lite Workflow with Packaging

Barcode scanner for UPC verification

Optional: Fingerprint reader to verify Snap Caps or Double Count

Lite Workflow with Technical Validation and Clinical Review

Signature pad for a pharmacist to sign a prescription or set up an e-signature

Optional: Fingerprint reader to sign a prescription

Setting Up Lite Digital Workflow

Lite Workflow can be set up for Retail prescriptions, Compliance prescriptions, or both.

To set up Lite Workflow:

- 1) Select **More > Pharmacy > Workflow**.
- 2) In the **Queue Management Retail** and/or **Compliance** section, dropdown the field below **Data Entry** and select one of the following:
 - **Packaging** – if you want Lite Workflow with Packaging only OR Lite Workflow with Technical Validation followed by Clinical Review.
 - **Clinical Review** – if you want Lite Workflow with Clinical Review followed by Technical Validation (pharmacist first model).

The fields below auto-populate to the remaining queues available.

- 3) Select the checkbox for Packaging OR Technical Validation/Clinical Review.



TIP: Technical Validation must be used in conjunction with Clinical Review. Selecting one auto-selects the other.

- 4) Select **Save**.

