

propel^{Rx} Patient App

Quick Start Guide

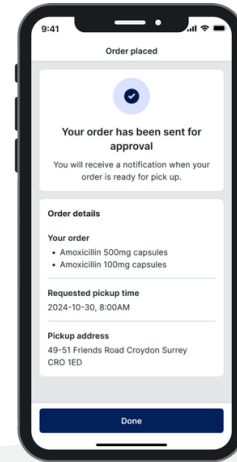
HOW TO USE THIS QUICK START GUIDE

1.

This guide is broken down into several sections

Select the hyperlinks below to quickly navigate to a section.

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2.



Take our e-Learning

This user guide is an accompaniment to our [e-learning course](#).

We recommend that any team members that use Propel Rx complete the e-learning course first as it covers the essentials of using Patient App in Propel Rx. The e-learning can be taken and revisited anytime.

3.

Refer to the Propel Rx Online Help



This quick start guide summarizes key points about Patient App in Propel Rx but additional detail, including step-by-step instructions can be found on our [Propel Rx Online Help](#).

4.

Refer to the Healthera Connect Training Guide

Healthera Connect is a platform you'll use in conjunction with Propel Rx to manage Patient App requests. For additional detail on Healthera Connect, refer to their [training guide](#).



INTRODUCTION

The Patient App program offers numerous benefits for your patients in terms of convenience, visibility, and efficiency. Your pharmacy also benefits from reduced call volumes, competitive differentiation, and greater pharmacy loyalty that comes from app usage.

There are three main components of the Patient App program. The arrows in the diagram below illustrate the two-way communication that occurs between each component.



You may have noticed from the above diagram that Propel Rx does not communicate with Healthera Connect. This means patient and prescription information from Healthera Connect is not ported directly to Propel Rx and vice versa.

This quick start guide will focus on how the integration works from a Propel Rx lens.

CHECKLIST FOR ACTIVATION

The following checklist is an overview of the one-time activities you need to perform for activation.

Before Your Activation Date

Set Up Healthera Connect



- ☐ Set up your [Healthera Connect](#) login from the link provided in the email invite.
- ☐ Confirm training is booked with Healthera.
- ☐ Work with your Success Manager from Healthera to ensure your opening hours and prescription request lead time are set up correctly.

Review Propel Rx Training Materials



- ☐ Take the [Introducing the Patient App Program](#) e-learning course on the Retail Learning Academy.
- ☐ Read this Quick Start guide.
- ☐ Review our best practices for tips on enrolling patients in Patient App.

On Your Activation Day

Set Up Marketing Materials



- ☐ Display marketing materials in your pharmacy.

Set Up Propel Rx Pharmacy Preferences & Caregiver Relationships



- ☐ Refer to [pages 5 - 6](#) in this Quick Start Guide. After setting the preferences, ensure to close and relaunch Propel Rx on all computers for the changes to take effect.
- ☐ Review the list of patients with Shared Emails and set up Caregiver Relationships ([page 8](#)).

Test the Connection



- ☐ Enroll a team member and have them follow the steps in the enrollment email to download and link their account in the new Patient App.
- ☐ Have the enrolled team member test refilling a prescription and submitting a new photo prescription (PhotoRx) via the Patient App.

CHECKLIST OF DAILY ACTIVITIES

Use the following checklist as a reminder of the daily activities to perform when using Patient App.

Launch Healthera Connect and Check Regularly for Requests



- ☐ Launch [Healthera Connect](#) on all computers.
- ☐ Check and refresh Healthera Connect frequently for any incoming patient messages or patient linkage requests. You will be alerted of patient linkage requests in Healthera Connect via an accompanying fax and email.



- ☐ For patient linkage requests in Healthera Connect, scroll down the page to review insurance, allergy, and other patient information. Print the page if needed as it will be deleted from Healthera Connect once you enroll the patient in Propel Rx.

Assist Patients with Enrollment



- ☐ Assist patients at drop-off and pickup with downloading and enrolling in the Patient App.
- ☐ If your pharmacy used a different app previously and you still see requests from it, confirm the patient is enrolled in Propel Rx and has switched apps so future requests go directly to Propel Rx.

Review the Workbench for Incoming Requests



- ☐ Process any incoming refill prescriptions (**w**) and PhotoRx requests () from the Workbench.
- ☐ Do not **Escape** from Patient App prescriptions in Rx Detail unless you want them removed from the Workbench!

Send Pickup Notifications and Scan/Manually Pickup Prescriptions



- ☐ If Auto-Send is OFF, send manual pickup notifications from the Pick Up/Delivery tile. This can be done for any prescription, even if it was not submitted via the app, as long as the patient is enrolled in Patient App and Pickup Reminders.

The patient will receive a notification via the app. An email will also be sent if the prescription was submitted via the app.



- ☐ **For stores without POS integration**, manually mark prescriptions as Picked Up once the patient collects the medication. Otherwise, the patient cannot refill the prescription via the app.

SETTING PHARMACY PREFERENCES

Once your pharmacy is live with Patient App, set up the following preferences for your pharmacy in Propel Rx and Healthera Connect. These only need to be set up once.

Propel Rx Pharmacy Preferences



For a video on setting up your [Propel Rx Pharmacy Preferences](#), scan the QR code on the right.

1. Turn Auto-Send ON/OFF

Auto-Send dictates whether pickup notifications are sent manually or automatically.

If your pharmacy uses Lite or Full Digital Workflow...

- Turn Auto-Send ON if you want pickup notifications to be sent automatically after a prescription completes the last Workflow step configured for your pharmacy (e.g., if you use Lite Digital Workflow with Packaging, the last step would be Packaging).
- Turn Auto-Send OFF if you want to manually send pickup notifications.

If your pharmacy does not use Digital Workflow...

- Turn Auto-Send OFF. Advise your patients that prescriptions will only be ready once they receive the push notification.



Auto-Send is NOT recommended for pharmacies without Digital Workflow or Lite Digital Workflow with Packaging only, as pickup notifications will be sent before your pharmacy has a chance to package, check, and have the prescription ready for pickup.

2. Set Pickup Reminders = Selected Patients

Set Pickup Reminders to Selected Patients. Only patients that have Accepted Pickup Reminders will receive pickup notifications. If set to None, pickup notifications will not be sent for any patients.

What is the difference between the Selected Patients and All Patients options?

- For the purposes of the Patient App program, there is no difference between these options.
- The difference becomes evident when your pharmacy has other integrations activated such as IVR or Amjay Software Solutions. For these programs, the All Patients option means patients who have their Pickup Reminders set to Not Asked will also receive pickup notifications in addition to those that Accepted.

SETTING PHARMACY PREFERENCES

3.

Set Birth Date as a Required Patient Field

Birth date is required to enroll a patient in the Patient App program. In the Required Patient Fields section, turn the Birth Date flag ON to ensure the patient's birth date is added when creating a new Patient Folder.

4.

Turn Background IVR, Auto Refill, Web Refill ON/OFF

Turn the Background IVR, Auto Refill, Web Refill flag ON if you want your Patient App, Auto Refill, and IVR prescriptions to process automatically upon receipt.



Background processing will not occur in British Columbia, Alberta (RTI enabled), Saskatchewan, and Newfoundland and Labrador.



Remember to close and relaunch Propel Rx on all computers after making any changes to Pharmacy Preferences!

Healthera Connect Pharmacy Preferences

1.

Adjust Opening Hours and Pickup Lead Time

The Opening Hours and Pickup lead time determine the range of pickup times and first available pickup time that can be selected by the patient on the app. The requested pickup time will be visible as a note attached to the prescription in Propel Rx.

For more information, see the [Healthera Connect Training Guide](#).



HOW TO USE PATIENT APP IN PROPEL RX

How do I enroll a patient from Propel Rx?

1. Open the **Patient Folder**. In the Main tab, ensure the **birth date** and **primary email** are entered correctly.
2. Navigate to the **Programs** tab.
3. Select the Patient App **Enroll/Decline** button.
4. Confirm the email address and select **Enroll**.

An automated email is sent to the patient once you enroll them from Propel Rx. Once they download the app, create a profile, and verify their account, their Patient App enrollment status updates from Pending to Patient Enrolled in Propel Rx, and they will be linked to your pharmacy.

How do I enroll non-retail group patients?

Non-retail group patients cannot be enrolled in the Patient App. If these patients were previously enrolled in the diem health app, they will be automatically unenrolled upon migration.

1. Open the **Patient Folder** > **Main** tab > **Groups** sub-tab.
2. Select the group and then **Remove**. Ensure to note the group name so you can add them back afterwards.
3. Follow the steps to enroll the patient in Patient App.
4. Once the patient accepts and completes enrollment, add them back to the group from the **Groups** sub-tab.
5. Select **Yes** to the prompt to carry over prescriptions.
6. Reassign Group Rx Statuses to the patient's prescriptions if needed.

If you need to enroll these patients (e.g., so they can order PRNs via the app), you can remove them from the group, enroll, and add them back to the group.

HOW TO USE PATIENT APP IN PROPEL RX

How do I assign a caregiver?

A Caregiver in Propel Rx is an individual who manages another patient's prescriptions. This can be a family member for example.

If patients are migrating from the diem health app, Healthera will provide you with a list of previously linked patients to review because the linking process is different with the new Patient App.

1. Open the **Patient Folder** for the Person in Care.
2. On the **Main** tab, select the **Relationships** sub-tab and then **Add**.
3. Search for and select the Caregiver.
4. Set the **Role** to Caregiver and enter **consent** if the patient is 14 years or older.
5. Ensure the **Communication for PiC** is turned ON if the Caregiver should receive pickup notifications for the patient.
6. Select **Save**.

How do I resend an enrollment email?

An enrollment email can be resent if at least 24 hours has passed since the last send.

Patients who were previously enrolled in diem health will receive an automated email inviting them to enroll in Patient App and download the new app. Their status will show as Pending in the Programs tab for up to 30 days. If needed, you can resend the enrollment email.

1. Open the **Patient Folder**.
2. Navigate to the **Programs** tab.
3. Select the Patient App **Enroll/Decline** button.
4. Confirm the email address and select **Enroll**.

HOW TO USE PATIENT APP IN PROPEL RX

Where can I find Patient App Rx's?

If the **Background IVR, Auto Refill, Web Refill** preference is ON, Propel Rx will attempt to process refill requests automatically. PhotoRx requests must always be processed manually.

Patients who are not enrolled at your pharmacy can submit a

PhotoRx but it will need to be printed from Healthera Connect and manually entered in Propel Rx. For these non-enrolled app requests, pharmacies will receive a fax notification as a reminder to check Healthera Connect.

- Refill requests appear on the Workbench with a **W** indicator.
- PhotoRx prescriptions appear on the Workbench with a  icon.
- Patient App prescriptions appear on the Workbench on the day they were submitted.
- The patient's chosen pickup date and time or delivery date is set as the prescription's Ready Time.
- Remember to check Healthera Connect frequently for new requests.

How do I enroll a patient in Pickup Reminders?

To send a pickup notification to a patient that their prescription is filled and ready for pickup, they must first be enrolled in Pickup Reminders in Propel Rx.

1. Open the **Patient Folder**.
2. Navigate to the **Programs** tab.
3. Select **Pickup Reminders** = Accepted, **Notification Channel** = Patient App, **Communication Method** = App, and **Communication Preference** = Push Notification.
4. Select **Save**.

HOW TO USE PATIENT APP IN PROPEL RX

How do I send Pickup Reminders?

Notifications will be sent after approximately 30 minutes to group the patient's prescription messages together. You can manually send 1 Pickup Reminder for a prescription every 24 hours. The W indicator in the Pick Up/Delivery tile will change colour from **red** to **blue** after a Rx Ready Only notification is sent.



If your patients are not receiving pickup notifications, ensure their App preferences are set to receive notifications.

- If **Auto-Send** is ON, Pickup Reminders are sent automatically when a prescription completes Workflow.
- If **Auto-Send** is OFF, navigate to the **Pick Up/Delivery** tile > select the prescription > **Rx** > **Rx Ready** > **Rx Ready Only**.

How do I mark Rx's as picked up?

Ensure prescriptions are marked as Picked Up when they're given to the patient.

When a prescription is marked as Picked Up, its status is updated in Propel Rx and the app.

Wait at least 2 minutes from completing Workflow before manually marking a prescription as Picked Up to allow the pickup notification to be sent.



If a prescription is still awaiting pickup on the app, the patient cannot order refills for it via the Patient App. Ensure you mark prescriptions as picked up when they're given to the patient.

- For pharmacies with POS integration, scan the prescriptions at the till.
- For pharmacies without POS integration, navigate to the **Pick Up/Delivery** tile > select prescription(s) > **Pick Up** > **OK**.

HOW TO USE PATIENT APP IN PROPEL RX

Why are Picked Up Rx's still in the Pick Up/Delivery tile?

- A Dispense Pickup preference exists for certain EHR provinces to control when Pick Up messages are sent to the EHR.
- When this preference is set to Dispense, Pick Up messages may send before the patient actually picks up their prescription.

In the provinces of Alberta, Saskatchewan, and Nova Scotia, if **POS integration is OFF** and the **Dispense Pickup preference is set to Dispense**, prescriptions for patients enrolled in Patient App will remain in the Pick Up/Delivery tile for three days after achieving a Picked Up status.

This allows pickup notifications to be sent using Rx Ready (if Auto-Send is OFF). If Auto-Send is ON, Rx Ready is disabled but prescriptions still remain in the tile for three days.

APP BENEFITS



Uptake of the Patient App benefits your pharmacy as well!

Time Savings



- New and Refill prescriptions land in the Propel Rx Workbench.
- No more reminder phone calls with Rx Ready notifications.
- Fewer phone calls + less manual data entry = more time for other tasks.

Efficient Workflow



- Electronic prescription ordering and Rx Ready notifications lead to faster prescription processing, easier inventory management, and exceptional customer service.

Ease of Communications



- In-App messaging replaces phone calls.
- Blast messaging feature lets you provide pharmacy marketing directly to your patient's phone.

Growth & Loyalty



- The App enhances your pharmacy's reputation and competitiveness.
- Digital services attract tech-savvy patients, growing your customer base.
- Easy for seniors to use.

Trying to convince a patient to use the App? Here are some talking points to get the conversation going.

Convenient

- Patients can request refills anytime 24/7, from anywhere, and without needing to call the pharmacy.
- Easy to use refill requests minimize the risk of running out of essential medications.

Accessible

- Patients can access prescription information including dosage, instructions, and prescription history at their fingertips.
- In-App messaging enhances communication with your pharmacy.

Family-Friendly

- Patients can manage multiple prescriptions for themselves and their family members all in one place using the Caregiver functionality.

Efficient

- Patient can electronically submit refill requests and set pickup times.
- Rx Ready notifications reduce waiting times and trips to the pharmacy for those with mobility issues or busy schedules.

Private

- Patients using the App can manage their prescriptions discreetly.

APP ENROLLMENT BEST PRACTICES



Engage patients at drop-off or pickup

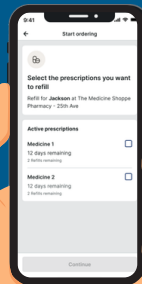
At your first point of contact with the patient, ask whether they have downloaded the app. This could be at drop-off, over the phone during a refill request, or when a transfer-in is requested. Patients will embrace the app faster if your team demonstrates how to use it.

Train your team so they know how to set up enrollment and guide a patient through downloading the app, registering their account, and placing prescription orders. Encourage your patients to order future prescriptions using the app. This will save you many minutes of future time.



Link patients with their caregivers

Ensure family members and caregivers are appropriately linked in Propel Rx. This allows prescriptions to be ordered by parents for their children and caregivers for those in their care.



Engage seniors

Challenge the misconception that seniors do not want to, or are unable to use the app to order prescriptions.

The biggest hurdle for seniors is getting the app set up on their phone. Have your team assist with this. Given the high volume of prescriptions that seniors account for, the return on investment is well worth it.



Design a sales pitch

Ensure your pharmacy team has a common message when communicating with patients about the merits of the app for maximum impact.

“Our pharmacy is now using the app for all refill requests. Let me show you how you can use it to easily order your refills. It will also allow us to send a message when your refill is ready for pickup.”

Motivate your team

When milestones are reached, offer rewards for your team like a pizza lunch for every 50 enrolled patients.

As more app prescriptions appear on the Workbench and fewer calls come in for refills, motivation will grow.



Designate a support personnel

Assign a dedicated team member to be the main pharmacy contact for all app related technical support.



Redirect to the app

If your pharmacy has a website or microsite, direct all refill requests to the app. Remove the option to order via email.

If your pharmacy has an IVR system, instruct callers to download and order prescriptions from the app instead of leaving a voicemail.

Create reminders

Use Bag Clippers to remind team members to discuss the app with patients at pickup if they ordered prescriptions over the phone.

These are not for patients to take home but rather serve as reminders for your team.



CUSTOMER SUPPORT

PTS and Healthera support you and your pharmacy.

Contact PTS Customer Care for inquiries related to Propel Rx such as:

- ✓ Enrolling patients in Propel Rx
- ✓ Linking caregivers to patients
- ✓ Locating and processing refill requests or PhotoRx's in Propel Rx
- ✓ Sending outbound push notifications from Propel Rx

📞 1.800.387.6093 ✉️ ptscustomer@mcckesson.ca
✉️ PTSCCSupervisor@mcckesson.ca (for escalations)

Contact Healthera Support for inquiries related to Healthera Connect or the app such as:

- ✓ Logging into Healthera Connect or the app
- ✓ Messaging patients, viewing linkage requests, or entering pharmacy details in Healthera Connect
- ✓ Viewing prescriptions and sending prescription requests from the app

✉️ support@healthera.ca 🌐 Healthera Connect live chat

