Pocket Guide

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DrFirst

👤 Patient Management

Tap **New Rx** on dashboard.

- **Recent Patients**: Tap name.
- **Patient Search**: Search by partial first / last name.
- **New Patient**: Navigates to patient creation (may be disabled for partner users).

🚑 Set Default Pharmacy

1. On **Patient Summary**, tap **Change** next to **Pharmacy**.
2. Enter search criteria into **Pharmacy Search** screen.
3. Tap **Search**.
4. Tap on pharmacy to add.

Tap codes on right side to see descriptions of pharmacy type.

❗ Clinical Alerts

Ensuring that the following patient information is complete will allow for alerts.

- **Active Medications**
- **Allergies**
- **Diagnoses**

Alerts appear during medication selection and review if you try to prescribe a medication that can cause a reaction in a patient.

🏥 Medication History

Displays up to one year of medication history through payer data and pharmacy fill data. This can be used to add active medications to patient records.

1. On **Patient Summary** screen, scroll to **Active Medications**.
2. Tap **Pull Record**.
3. Tap green circles to select medications.
4. Tap name of a medication to see detailed view.
5. Tap **Add Selected** to finish.

📋 Manage Medications

See instructions below to manually add active medications to a patient record.

1. Tap **Add** on patient summary screen.
2. Type medication to search. Results display as you type. Commonly prescribed medications display first.
3. Tap name of medication.
4. Tap a strength to add to patient record.
5. Add as is or provide additional information as needed.

⬤ Adding an Allergy

From the patient summary screen, indicate **No Known Drug Allergies (NKDA)** by tapping the link, or search by tapping **Add**.

1. Search for medication to add as allergy. Results will display as you type.
2. Tap on a medication to select it.
   *View related medications through the **Related** dropdown.*
3. Enter onset date (if applicable), and choose a reaction.
4. Tap **Create Allergy** to complete.

📋 Adding a Diagnosis

From the patient summary screen, indicate **No Known Diagnosis** by Tapping the link, or search for diagnosis by tapping **Add**.

1. Search for a diagnosis by entering a description or a diagnosis code. Results will display as you type.
2. Change the coding system below the search box as needed.
3. Tap on a diagnosis to select it.
4. Enter onset date (if applicable).
5. Tap **Create Diagnosis** to complete.

📅 Adding an Encounter

Record encounters to keep track of patient visits. iPrescribe will only display the five most recent encounters.

1. From the patient summary screen, scroll down to the **Encounter** section (bottom of screen).
2. Tap **Add**.
3. Select a responsible provider, and enter an encounter date.
4. Tap **Create Encounter** to complete.

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Starting and Sending a New Prescription

Clinical Staff members can queue prescriptions, but only providers can send a prescription (unless using provider agent workflow).

1. Tap **Create New Rx** button from a patient profile.
2. Search a medication by typing the name, or select a favorite from your list.
3. To select a dose, tap the desired number.
4. Users can create custom prescription or choose a pre-populated Smart String option (commonly prescribed methods).
5. On sig page, update sig, duration, quantity, refills, substitution permitted, and directions to pharmacist as needed.
6. If sig needs to be updated, tap **edit**.
7. Tap **Continue** at bottom of page.
8. Review on **Rx Review** screen.
9. Tap prescription to return to sig page if changes are needed.
10. Action Options:
    a. **Sign and Send** to complete.
    b. **Add to Favorites** to favor prescription and return to review.
    c. **Add to Pending** to save as pending prescription.
11. Enter signature password on Signature screen to send.
12. Tap **Sign & Send** button to complete.

Provider Agent Setup

Providers can approve staff to send non-controlled prescriptions to pharmacies on their behalf. Providers will still need to sign them to remove them from their pending queue. Providers can set up provider agents through the below steps.

1. From dashboard, tap **menu** icon in top left.
2. Tap **Settings**.
3. Tap **Manage My Agents**.
4. Toggle staff users who should have provider agent privileges.
5. Enter signature password, and tap **Approve Changes**.

Signing a Controlled Substance Prescription

Only providers who have completed EPCS on-boarding can send controlled substances through iPrescribe.

1. Follow the steps from the **Starting and Sending a New Prescription** section to write a prescription and continue onto the additional steps below.
2. Once you tap **Sign and Send**, you will enter the workflow to complete two-factor authentication (within four minutes).
3. A disclaimer screen will appear on which you must confirm that you are the prescriber logged in. Tap **Continue** to confirm your identity.
4. Review the prescription, and tap **Approve** to continue.
5. On following screen:
   a. Select an **OTP Token** from the dropdown.
   b. Enter your **Signing Passphrase**.
   c. Enter an **OTP PIN** from the selected token.
6. Tap **Sign** to complete sending prescription to pharmacy.

A soft token cannot be used to validate controlled substance prescriptions if the soft token and iPrescribe are on the same mobile device (per DEA regulations).

History

The **History** screen allows you to check statuses of all sent prescriptions for your practice.

1. From dashboard, tap **menu** icon in top left.
2. Tap **History**.
3. Change provider and patient filters as necessary. Results will default to provider who is logged in and all patients.
4. Tap **Complete** or **Undelivered** to check lists of sent or failed prescriptions.
5. Tap a prescription and scroll through page for details such as the **Transmission History** at the bottom.

🔔 Pending Prescriptions

Tap **Pending Rx** on the dashboard to process up to 10 pending prescriptions at once.

1. Tap appropriate option per pending prescription.
2. Tap **Next** button in the lower right-hand corner.
3. Enter signature password.
4. Tap **Sign & Send** to authorize.

Action Options:

- **Chat** will launch DrFirst's Backline application for secure chat (if set up).
- **Delete** will remove prescriptions from pending list.
- **Approve** will transmit prescriptions electronically.

🔄 Renewal Requests

Tap **Renewals** on the dashboard to access any renewal requests sent by a pharmacy to your practice.

1. Tap appropriate option per renewal request.
2. Tap **Next** button in the lower right-hand corner.
3. Enter signature password.
4. Tap **Sign & Send** button to authorize.

Action Options:

- **Chat** will launch DrFirst's Backline application for secure chat (if set up).
- **Forward** will forward request to another provider in practice.
- **Deny** will reject request. You must enter a reason for denial.
- **Renew** will approve renewal request.

📞 Support Contact

If you have any questions or require assistance, you can contact your support resource or DrFirst's 24/7 Support Team.

To contact DrFirst, please call at **(866) 263-6512**, log in to your **JIRA Service Desk** account, or submit through the **Support** option in iPrescribe.