

Submitting an eCare Plan on Pioneer

Modified for CPESN NC WellCare of NC Contract

Originally prepared by Ally Snapp, PharmD

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Step 1: Add new partner to submit eCare Plan

PioneerRx Rx Workflow Patient Third Party Account Sale Item Inventory Ordering Analysis Care Plan **Location** System

Company & Locations **My Location** Contact Employee User Search Role List My Password/PIN In/Out Manage Message Center

Company Contact Employee Security Time Clock Message Center

Edit Company Location - Bremo Pharmacy

Actions Tools Search Reports Analysis

Pharmacy Profile

Common Employees Location Options Location Hours Item Options Rx Options Patient Options Third Party Options **Care Plan Options** Rx Local Fax Options POS Options Server Options System Images Mobile Devices Waiting Board Email Notification Options Message Center Options

General Services Care Goal Categories Care Goals Care Goal Groups Care Goal Defaults Submission Rules **Partners**

26 Records Collapse/Expand View: PioneerRx Recommended (Location) Refresh Add Edit Menu

Drag a column header here to group by that column.

Destination	Description	Plan Code	Status	Plan Type	Source Type
CPESN			Active	Medical	System
CPESN	New York Only	ABH1	Inactive	Medical	System
CPESN	New York Only	ABH2	Inactive	Medical	System
CPESN		ABHKS	Active	Medical	System
CPESN		ABHKY	Active	Medical	System
CPESN	Tennessee Only	AmerisourceBergen C...	Inactive	Medical	System
CPESN		AngelRx	Inactive	Medical	System
CPESN		BHP	Active	Medical	System
CPESN		CCHP	Active	Medical	System
CPESN	South Carolina Only	DUKE	Inactive	Medical	System
CPESN		ENGAGERX20	Active	Medical	System
CPESN	Highmark Whole Care	HighWC	Inactive	Pharmacy	System
CPESN		HMA3	Active	Medical	System
CPESN		ISUODP	Active	Medical	System
CPESN		MADPH	Active	Medical	System
CPESN		NTC	Active	Medical	System
CPESN		RxEVOLUTION	Active	Medical	System
CPESN		SDDOH	Active	Medical	System
CPESN		TRAD	Active	Medical	System
CPESN		TROY	Active	Medical	System
CPESN		UAP	Active	Medical	System
CPESN		UCR	Active	Medical	User
CPESN	Pennsylvania Only	UHCPA1	Inactive	Medical	System
CPESN		UWY	Active	Medical	System
CPESN		W/FH	Active	Medical	System
CPESN		WYDPP	Active	Medical	System

Step 6. Type in **CPESN** for Destination

Step 7. **WCNC** for Plan Code

Step 8. Medical for plan type

Step 9. Save

****When submitting your eCare plan, make sure to select the destination with **WCNC** as the plan code**

go to location at the top of the screen and then my location>care plan options> partners> add > then type in CPESN for destination and the WCNC for plan code, Active for status and Medical for plan type. Once you save it, you should be able to select the appropriate CPESN with the plan code when submitting the eCare plan.

Step 2: Add eCare Plan to patients profile

Bremo Pharmacy - Edit Patient - Patient Test - DOB: 11/11/1990 - Phone: (804) 000-0111

PioneerRx Rx Workflow Patient Third Party Account Sale Item Inventory Ordering Analysis Care Plan Location System

Rx Profile Patient Pre-Check Edit Rx Batch Process Batch Post Scan Find Rx Rx Edit Sig External Location (External Pharmacy) PMP Submission Immunization Reporting Rx Tax Repair

Data Entry Rx Rx Edit Sig Transfers Compliance Tax Repair

Rx Profile - Patient Test - DOB: 11/11/1990 - Phone: (804) 000-0111 Actions Tools Search Reports Analysis

Quick Search: Test, Patient Next Patient Patient does not have Rx's in the current filtered time frame of 2 years.

Phone: (804) 000-0111 DOB: 11/11/1990 32 Health Coach: Facility: Delivery Zone:

Profile Other Medications Care Plan Vaccines Labs Events Medication Reconciliation Messages

Rxs Show: Active Plus Expired Written in last 2 years Rx#: Action: <Choose> Legend

0 Records 0 Cycle, 0 PRN Collapse/Expand View: Regina (User) Refresh Edit Menu

Drag a column header here to group by that column.

☐	Rx Number	Dispensed Item	Directions	Workflow Status	Workflow Date	Last Dispensed Quantity	Bin	Prescriber	PRN	Cycle	Future Fill	Auto Refill	Days Supply	Last Pay Method	Patient Days Supply Ends
--------------------------	-----------	----------------	------------	-----------------	---------------	-------------------------	-----	------------	-----	-------	-------------	-------------	-------------	-----------------	--------------------------

Refill - F2 New Rx - F3 Edit - F4 Renew - F5 Transfer - F6 Discontinue - F7 Process Rejects - F8 Cancel - ESC

First we need to pull up our patient and go into the edit profile screen

Bremo Pharmacy - Edit Patient - Patient Test - DOB: 11/11/1990 - Phone: (804) 000-0111

PioneerRx Rx Workflow Patient Third Party Account Sale Item Inventory Ordering Analysis Care Plan Location System

Rx Profile Patient Pre-Check Edit Rx Batch Process Batch Post Scan Find Rx Rx Edit Sig External Location (External Pharmacy) PMP Submission Immunization Reporting Rx Tax Repair

Data Entry Rx Rx Edit

Rx Profile - Patient Test - DOB: 11/11/1990 - Phone: (804) 000-0111

Quick Search: Test, Patient

Phone: (804) 000-0111 DOB: 11/11/1990 32

Profile Other Medications Care Plan Vaccines Labs Events Medication F

Rxs Show: Active Plus Expired Written in last 2

0 Records | 0 Cycle, 0 PRN

Drag a column header here to group by that column.

Rx Number	Dispensed Item	Directions	Wo
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Edit Patient - Patient Test - DOB: 11/11/1990 - Phone: (804) 000-0111

Actions Tools Search Reports Analysis

Comm **Profile** Rx History Patient Links Facilities Categories HIPAA Emergency Contacts Documents Item Preferences Overrides Escrip Alias RxLocal

Name (Last, First) Test, Patient

Third Party Workers' Comp Cash A/R / Autopay Medical

Third Parties: Filter: Active Legend

Name	Use	Start Date	Expiration Date	End Date	BIN	PCN	Cardholder Name	Ca
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Phone Numbers

Primary: Other 804 - 000-0111 Ext:

Email:

Notification #: Direct SMS

Notification: Do not notify

Refill / Renew: Not Used

Date of Birth: 11/11/1990 Age: 32

Gender: <Choose> Ignore Pregnancy Precautions

Allergies: Ask Patient?

Other Medications: Ask Patient?

Conditions: Ask Patient?

Facility:

Default Priority: <Choose>

Delivery Method: <None>

Identification Demographics Options Loyalty

Drivers License: VA Expiration Date:

MBI:

SSN:

Alternate ID: Other

Identification Expiration Date:

External ID:

Legacy ID:

Critical Comments (pop-up during the fill process)

Patient Status: Active Status Changed Date: 11/11/2022 4:48 PM Sync Status: Not Enrolled Save & Close - F12 Cancel - ESC

Refill - F2 New Rx - F3 Edit - F4 Renew - F5 Transfer - F6 Discontinue - F7 Process Rejects - F8 Cancel - ESC

Once you are in the edit screen, navigate over to the profile tab.

Bremo Pharmacy - Edit Patient - Patient Test - DOB: 11/11/1990 - Phone: (804) 000-0111

PioneerRx Rx Workflow Patient Third Party Account Sale Item Inventory Ordering Analysis Care Plan Location System

Rx Profile Patient Pre-Check Edit Rx Batch Process Batch Post Scan Find Rx Rx Edit Sig External Location (External Pharmacy) PMP Submission Immunization Reporting Rx Tax Repair

Data Entry Rx Rx Edit

Rx Profile - Patient Test - DOB: 11/11/1990 - Phone: (804) 000-0111

Quick Search: Test, Patient

Phone: (804) 000-0111 DOB: 11/11/1990 32

Profile Other Medications Care Plan Vaccines Labs Events Medication F

Rxs Show: Active Plus Expired Written in last 2

0 Records 0 Cycle, 0 PRN

Drag a column header here to group by that column.

Rx Number	Dispensed Item	Directions	Workflow Status	Workflow Date	Last Dispensed Quantity	Bin	Prescriber	PRN	Cy
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0 Records 0 Cycle, 0 PRN Collapse/Expand View: Regina (User) Refresh Edit Menu

Drag a column header here to group by that column.

Contact Via: None On: Enter a date Enter a time Next Pickup By: Enter a date Sync Days: 0 Next Pickup By: Enter a date

Sent: Response: Sync Comments Patient Response

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Process Cycle - F2 Add Comment - F3 Add Care Goal - F4 View Sync Goal - F5

Patient Status: Active Status Changed Date: 11/11/2022 4:48 PM Sync Status: Not Enrolled Save & Close - F12 Cancel - ESC

Refill - F2 New Rx - F3 Edit - F4 Renew - F5 Transfer - F6 Discontinue - F7 Process Rejects - F8 Cancel - ESC

Ally Snapp logged on to Bremo Pharmacy

Bremo Pharmacy - Edit Patient - Patient Test - DOB: 11/11/1990 - Phone: (804) 000-0111

PioneerRx Rx Workflow Patient Third Party Account Sale Item Inventory Ordering Analysis Care Plan Location System

Rx Profile Patient Pre-Check Edit Rx Batch Process Batch Post Scan Find Rx Rx Edit Sig External Location (External Pharmacy) PMP Submission Immunization Reporting Rx Tax Repair

Data Entry Rx Rx Edit

Rx Profile - Patient Test - DOB: 11/11/1990 - Phone: (804) 000-0111

Quick Search: Test, Patient

Phone: (804) 000-0111 DOB: 11/11/1990 32

Profile Other Medications Care Plan Vaccines Labs Events Medication Reconciliation

Rxs Show: Active Plus Expired Written in last 2

0 Records | 0 Cycle, 0 PRN

Drag a column header here to group by that column.

Rx Number	Dispensed Item	Directions	Wo
-----------	----------------	------------	----

Drag a column header here to group by that column.

Common [1] Action List [2] Measures [3] Submission Hx [4] +

Patient Assessment: Patient Test is a 32 year old with an:

[Allergy History of:](#) Ask Patient?

[Health Conditions:](#) Ask Patient?

[Vaccines Due:](#) No Vaccines Due

[Patient Aspirations:](#) No Current Aspirations

[Patient Comments:](#) No Patient Comments

Out of Range: No Out of Range Values

Care Goals - 0 Records Collapse/Expand View: Default (Location) + Refresh Add Goal (F2) Edit Menu Legend

Drag a column header here to group by that column.

Goal	Goal Category	Next Action Due	Goal Status	Completed On	Service
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Patient Status: Active Status Changed Date: 11/11/2022 4:48 PM Sync Status: Not Enrolled Save & Close - F12 Cancel - ESC

Refill - F2 New Rx - F3 Edit - F4 Renew - F5 Transfer - F6 Discontinue - F7 Process Rejects - F8 Cancel - ESC

Ally Snapp logged on to Bremo Pharmacy

Now that we are in the care plan tab, we need to add a goal

Bremo Pharmacy - Edit Patient - Patient Test - DOB: 11/11/1990 - Phone: (804) 000-0111

PioneerRx Rx Workflow Patient Third Party Account Sale Item Inventory Ordering Analysis Care Plan Location System

Rx Profile Patient Pre-Check Edit Rx Batch Process Batch Post Scan Find Rx Rx Edit Sig External Location (External Pharmacy) PMP Submission Immunization Reporting Rx Tax Repair

Data Entry Rx Rx Edit

Rx Profile - Patient Test - DOB: 11/11/1990 - Phone: (804) 000-0111

Quick Search: Test, Patient

Phone: (804) 000-0111 DOB: 11/11/1990 32

Profile Other Medications Care Plan Vaccines Labs Events Medication F

Rxs Show: Active Plus Expired Written in last 2

0 Records 0 Cycle, 0 PRN

Drag a column header here to group by that column.

Rx Number Dispensed Item Directions

Edit Patient - Patient Test - DOB: 11/11/1990 - Phone: (804) 000-0111

Actions Tools Search Reports Analysis

Common Profile Rx History

Primary Prescriber: Search

Sync Status: Not Enrolled

Add Care Goal(s) / Care Goal Group

Care Goal: UHC Blood Pressure

Browse - F3 Save & Open - F12 Cancel - ESC

General Other Medication

Common [1] Action L

Patient Assessment:

- [Allergy History of:](#) Ask Patient?
- [Health Conditions:](#) Ask Patient?
- [Vaccines Due:](#) No Vaccines Due
- [Patient Aspirations:](#) No Current Aspirations
- [Patient Comments:](#) No Patient Comments
- Out of Range: No Out of Range Values

Care Goals - 0 Records Collapse/Expand View: Default (Location) Refresh Add Goal (F2) Edit Menu Legend

Drag a column header here to group by that column.

Goal	Goal Category	Next Action Due	Goal Status	Completed On	Service
------	---------------	-----------------	-------------	--------------	---------

Patient Status: Active Status Changed Date: 11/11/2022 4:48 PM Sync Status: Not Enrolled Save & Close - F12 Cancel - ESC

Now we need to search for our goal. You will need to search whatever you named your eCare plan when creating it. Once you search and find the desired eCare plan, click save and open.

Step 3: Completing and Submitting an eCare Plan

Common Profile Rx History Patient Links Facilities Categories HIPAA Emergency Contacts Documents Item Preferences Overrides Escript Alias RxLocal

Primary Prescriber: Health Coach: Sync Status: Home Pharmacy:

General Other Medications Care Plan Vaccines Labs Events Medication Reconciliation Messages

Common [1] Action List [2] Measures [3] Submission Hx [4] Goal: CPESN BP x

General

Goal: Short Name: 8/25
SNOMED: Category: [Add Condition](#)[Goal Services](#): CPESN Education - Hypertension education;

Rxs, Medications, and Retail Items Primary Rx: <Choose>

Collapse/Expand View: Default (Location)

+ Add Menu Legend

Drag a column header here to group by that column.

Type	Medication	Directions	Last Completed Date	Supply	MPR	Gap	Qty	Status	Workflow	Comment	Latest RX	NDC	UPC	Strength
------	------------	------------	---------------------	--------	-----	-----	-----	--------	----------	---------	-----------	-----	-----	----------

1 Record Action: All

Collapse/Expand View: Default (Location)

+ Add Action Edit Menu

Drag a column header here to group by that column.

Start Date	Status	Added By	Due Date	Action	Added On	Description/Notes	Changed By	Changed On	Notes	Method - Target	Method	Target	Assigned To
	Pending	Ally Snapp		Call- Patient	11/16/2022 10:05 AM	Call- Patient		11/16/2022 10:05 AM	Documented blo...	Call - Patient	Call	Patient	Everyone

Cost Avoidance: <Choose>

Status:

So here we are still in the edit patient→ profile→ care plan screen and we now see that we have a care goal to be completed. So we are going to click on the pending goal

Common Profile Rx History Patient Links Facilities Categories HIPAA Emergency Contacts Documents Item Preferences Overrides Escript Alias RxLocal

Primary Prescriber: Health Coach: Sync Status: Not Enrolled
Home Pharmacy:

General Other Medications Care Plan Vaccines Labs Events Medication Reconciliation Messages

Common [1] Action List [2] Measures [3] Submission Hx [4] Goal: CPESN BP x +

General Blood Pressure x +

Action: Short Name: Blood Pressure 14/25
Method: Target: Start Date: Due On: Assigned To: Everyone Me
Intervention: 46973005 - Blood pressure taking Include in Care Coordination Note: No

Instruction Notes Reports

+ Add Edit Delete Move Left Move Right

General

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1. Look at the patient profile and see when their refills are due.

2. Call Patient

"Hello, my name is _____. I am calling from Brema Pharmacy. We are helping your insurance support their members with high blood pressure to prevent future problems such as stroke and heart attack. We do not have a recent blood pressure reading on file this year. Can you take a minute when you come in to pick up your prescription to let us take your blood pressure?"

If pt is not reached document call attempt in notes, schedule Call-patient action for the following week, after 3 call attempts complete action.

3. Schedule an appointment

Duration: 0 Minutes

Status: Pending Completed On: Complete - F2

Action Completion: Not Required

Once you click on that you will open up the eCare plan, where you will have your instructions on what to do to complete the eCare plan, If that is something you have set up. Next we will navigate over to the notes section

Common Profile Rx History Patient Links Facilities Categories HIPAA Emergency Contacts Documents Item Preferences Overrides Escript Alias RxLocal

Primary Prescriber: Health Coach: Sync Status: Home Pharmacy:

General Other Medications Care Plan Vaccines **Labs** Events Medication Reconciliation Messages

Common [1] Action List [2] Measures [3] Submission Hx [4] Goal: CPESN BP x +

General Blood Pressure x +

Action: Short Name: 14/25
 Method: Target: Start Date: Due On: Assigned To: [Me](#)
 Intervention: Include in Care Coordination Note:

Instructions Notes Reports

Documented blood pressure reading in patient's profile? Yes

Called attempts:

- 1.
- 2.
- 3.

Duration: Minutes

Status: Pending Completed On:

Action Completion:

Now we are in the notes section where we can document our encounters with the patient.

Common Profile Rx History Patient Links Facilities Categories HIPAA Emergency Contacts Documents Item Preferences Overrides Escrip Alias RxLocal

Primary Prescriber: Health Coach: Sync Status:
 Home Pharmacy:

General Other Medications Care Plan Vaccines Labs Events Medication Reconciliation Messages

Labs Legend

Collapse/Expand Add Edit Menu

Drag a column header here to group by that column.

Category	Lab	Unit	Due	Frequency	Mobile Frequency	Value	Date	Value	Date	Value	Date
----------	-----	------	-----	-----------	------------------	-------	------	-------	------	-------	------

PioneerRx Rx Workflow Patient Third Party Account Sale Item Inventory Ordering Analysis Care Plan Location System

Rx Profile Patient Pre-Check Edit Rx Batch Process Batch Post Scan Find Rx Rx Edit Sig External Location (External Pharmacy) PMP Submission Immunization Reporting Rx Tax Repair

Data Entry Rx Rx Edit Sig Transfers Compliance Tax Repair

Rx Profile - Patient Test - DOB: 11/11/1990 - Phone: (804) 000-0111

Actions Tools Search Reports Analysis

Quick Search: Test, Patient

Next Patient

Phone: (804) 000-0111 DOB: 11/11/1990 32

Profile Other Medications Care Plan Vaccines Labs Events Medication Reconciliation

Labs Legend

Drag a column header here to group by that column.

☐	Category	Lab	Unit	Due
☐	Others	Blood Pressure Diast.	mmHg	
☐	Others	Blood Pressure Syst.	mmHg	

Add Lab

Lab Date: 11/16/2022 3:43 PM Source: <Choose>

Scan - F11

Legend Lab Contains:

Collapse/Expand

View: PioneerRx Recommended (Location)

Menu

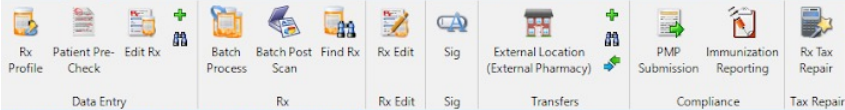
Drag a column header here to group by that column.

Category	Lab	Unit	Value	Within Range	Normal Low	Normal High
Narrow Therapeutic Dru...	Tacrolimus, Blood	ng/mL		Normal		
Narrow Therapeutic Dru...	Theophylline, Serum	µg/mL		Normal		
Narrow Therapeutic Dru...	Tobramycin	µg/mL		Normal		
Narrow Therapeutic Dru...	Valproic Acid, Serum	µg/mL		Normal		
Narrow Therapeutic Dru...	Vancomycin Peak, Serum	µg/mL		Normal		
Narrow Therapeutic Dru...	Vancomycin Trough, Ser...	µg/mL		Normal		
Others	Blood Pressure Average...	mmHg		Normal		
Others	Blood Pressure Diastolic	mmHg		Normal		
Others	Blood Pressure Systolic	mmHg		Normal		
Others	Ferritin	ng/mL		Normal		
Others	Folate	ng/dL		Normal		
Others	Heart Rate	bpm		Normal		
Others	Height	inches		Normal		
Others	IgA			Normal		
Others	IgD			Normal		
Others	IgE			Normal		
Others	IgG			Normal		
Others	IgM			Normal		
Others	Iron	µg/dL		Normal		

Save - F12

Cancel - ESC

PioneerRx Rx Workflow Patient Third Party Account Sale Item Inventory Ordering Analysis Care Plan Location System



Rx Profile - Patient Test - DOB: 11/11/1990 - Phone: (804) 000-0111

Actions - Tools - Search - Reports - Analysis - ?

Quick Search: Test, Patient

Next Patient

Phone: (804) 000-0111

DOB: 11/11/1990

32

Health Coach:

Facility:

Delivery Zone:

Profile Other Medications **Care Plan** Vaccines Labs Events Medication Reconciliation Messages

Labs Legend

Collapse/Expand Add Edit Menu

Drag a column header here to group by that column.

☐	Category	Lab	Unit	Due	Frequency	Mobile Frequency	Value	Date	Value	Date	Value	Date
☐	Others	Blood Pressure Diast.	mmHg		None	None	95.00	11/16/2022 3:29 PM				
☐	Others	Blood Pressure Syst.	mmHg		None	None	150.00	11/16/2022 3:29 PM				

Common Profile Rx History Patient Links Facilities Categories HIPAA Emergency Contacts Documents Item Preferences Overrides Escript Alias RxLocal

Primary Prescriber: Health Coach: Sync Status: Home Pharmacy:

General Other Medications Care Plan Vaccines Labs Events Medication Reconciliation Messages

Common [1] Action List [2] Measures [3] Submission Hx [4] Goal: CPESN BP x +

General Blood Pressure x +

Actions

Action: Short Name: 14/25
 Method: Target: Start Date: Due On: Assigned To: [Me](#)
 Intervention: Include in Care Coordination Note:

Instructions Notes Reports

Documented blood pressure reading in patient's profile? Yes

Called attempts:
 1. called pt and he is going to have his bp read when he picks his meds up next week
 2. patient came into get his meds and blood pressure taken, 150/95
 3.

Duration: Minutes

Status: Completed On:

Action Completion:

Here is just another screen shot of the notes section with information included. Once blood pressure is obtained and you have documented the reading. Add a duration (the default is 15 minutes) then you can hit the letter N for now. Next you will go to actions and click eCare Plan at the bottom of the drop down menu. Then click submit eCare plan

Common Profile Rx History Patient Links Facilities Categories HIPAA Emergency Contacts Documents Item Preferences Overrides Escrip Alias RxLocal

Primary Prescriber: Search for a Prescriber Health Coach: Search for an Employee Sync Status: Not Enrolled

Home Pharmacy Submit eCare Plan - Patient Test

General Other Medications Care Plan Vaccines Labs Events Medications

Common [1] Action List [2] Measures [3] Submission Hx [4] Goal [5]

Destination: Search or Press Enter for Care Plan Partner

Type: Initial

Start: 11/16/2022 12:00 AM

End: 11/16/2022 3:30 PM

Reason: 46973005 - Blood pressure taking

Instructions Notes Reports

General

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1. Look at the patient profile and see when their refills are due.

2. Call Patient

"Hello, my name is _____. I am calling from Brema Pharmacy. We are

prescription to let us take your blood pressure?"

If pt is not reached document call attempt in notes, schedule Call-pat

3. Schedule an appointment

****When submitting your eCare plan, make sure to select the destination with WCNC as the plan code**

Are you sure?

Are you sure you want to submit this patient's eCare Plan to CPESN?

Yes No

Attested By: Ally Snapp

[View Patient Submission History](#)

Print Preview - F2

Submit - F12

Cancel - ESC

Duration: 15 Minutes

Status: Complete

Completed On: 11/16/2022

3:30 PM

Activate - F2

Changed By: Ally Snapp on 11/16/2022 3:30 PM

Action Completion: Not Required

Patient Status: Active

Status Changed Date: 11/11/2022 4:48 PM

Sync Status: Not Enrolled

Save & Close - F12

Cancel - ESC