ARxConnect

Provider Portal User Guide

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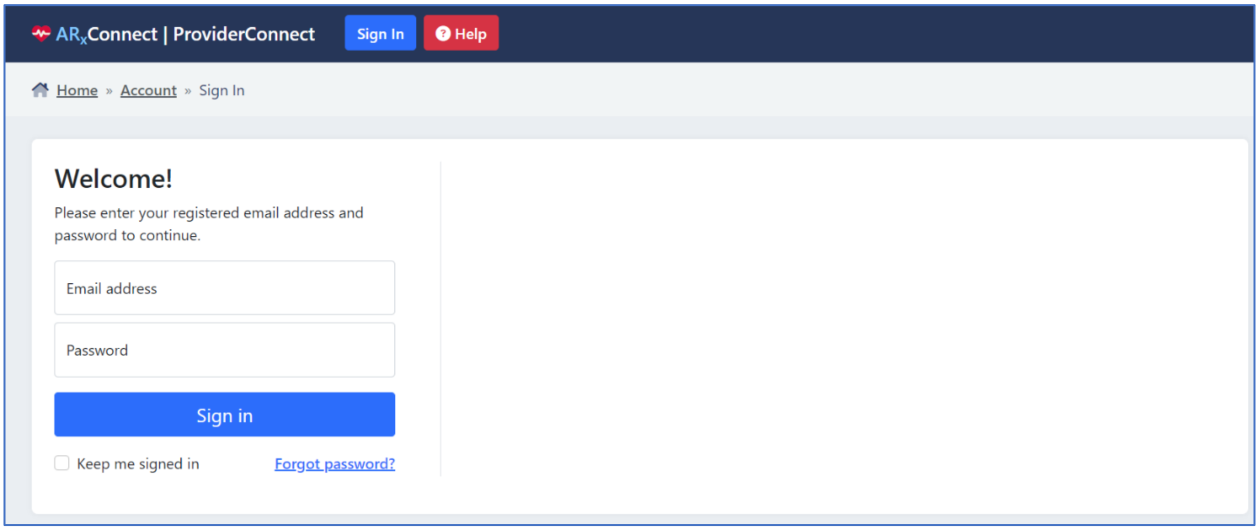
Logging In

Using your computer's web browser, navigate to the ARxConnect login page at the URL provided to you. If you did not receive a URL, please contact support. Once the page has loaded, you will be presented with the login screen.



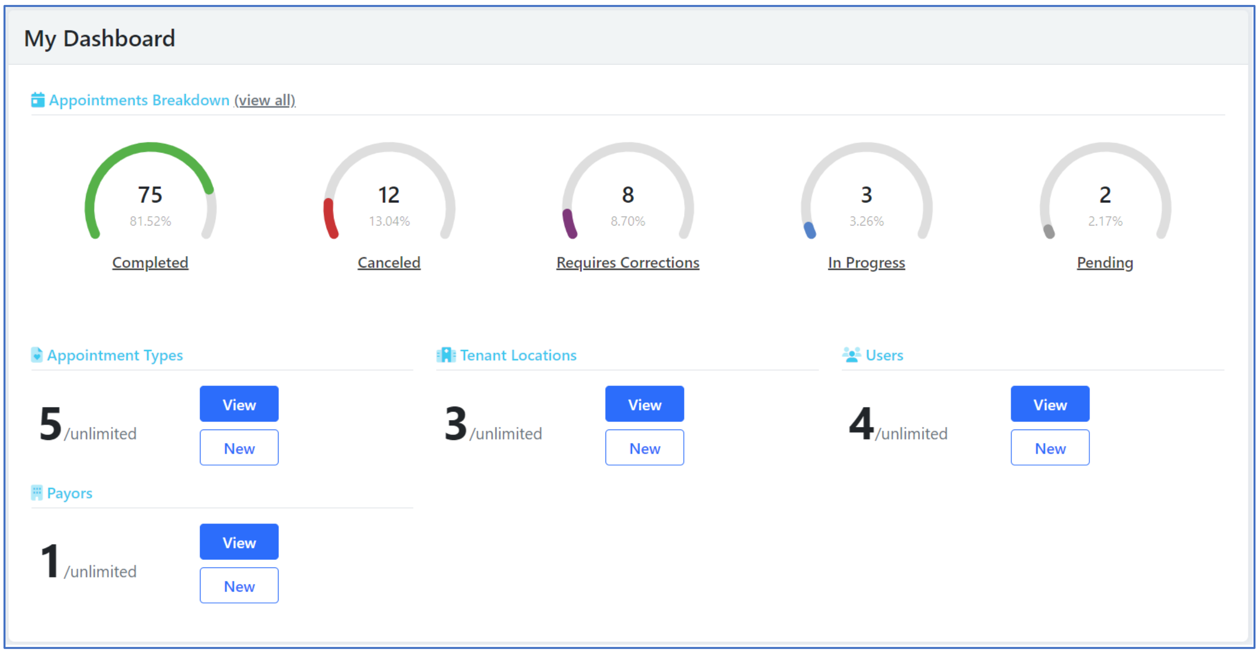
Enter your e-mail address and password in their respective fields, and click the "Sign in" button.

If you are using a public or shared computer, it is recommended that you do not check the "Keep me signed in" box.

In the event that you forget your password, or if this is your first time logging in and you haven't been issued a password, you can initiate the retrieval process by clicking on the "Forgot password?" link. Enter your e-mail address in the text field and click the "Send" button. You will be returned to the login page. In a short while, you will receive an e-mail containing instructions detailing the rest of the password reset process. Please be sure to check your spam folder if you haven't received the password reset email.

Your Dashboard

After logging in, you'll be presented with a dashboard that will show you a breakdown of your appointments by status. Depending on the permissions assigned to you, you may also be shown any administrative functions you have available to you, such as managing appointment types, tenant locations, payors, and users.



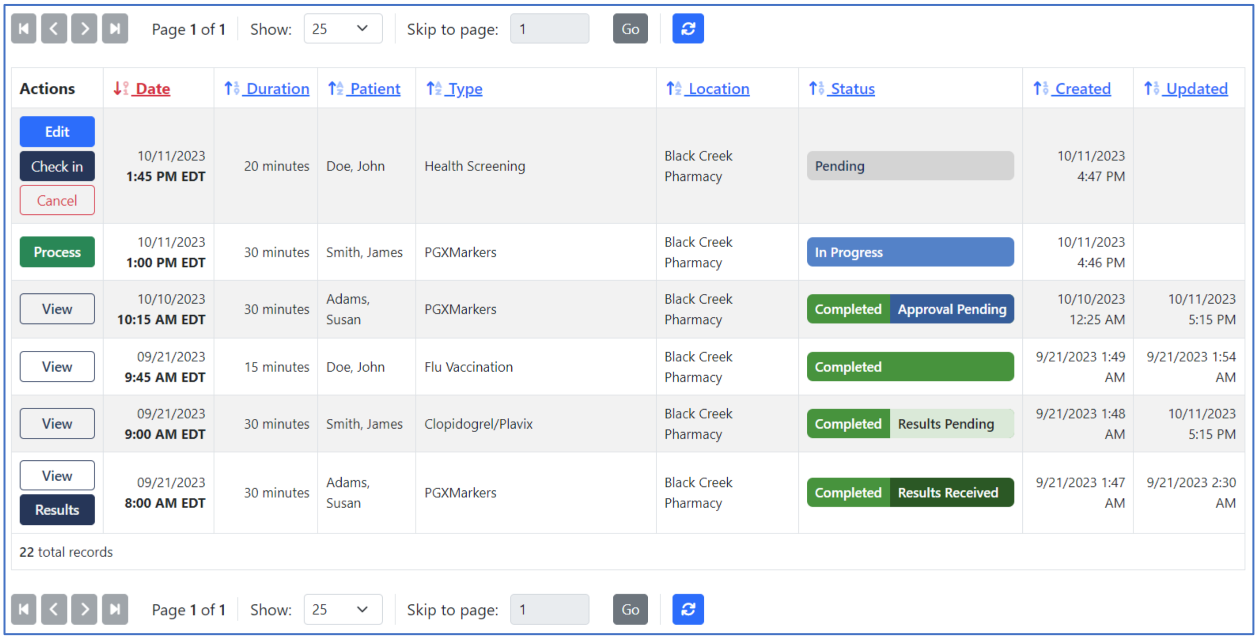
Clicking on an appointment status chart will take you to your appointments page with the grid filtered to that status. For example, if you click on the "Canceled" chart, the appointment grid will initially only show canceled appointments.

The banner at the top of the page will also give you access to each of these functions:

"Home" will take you to the Dashboard, "Appointments" will take you to your appointment list, and "Manage" will allow you to manage any administrative functions assigned to you.

Appointments

The Appointments page will give you access to any appointments that have been scheduled for your organization. Appointments are displayed in a list with a summary of each appointment along with its status. The list can be sorted by clicking on any of the column headers to sort by that column.



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Actions	Date	Duration	Patient	Type	Location	Status	Created	Updated
Edit Check in Cancel	10/11/2023 1:45 PM EDT	20 minutes	Doe, John	Health Screening	Black Creek Pharmacy	Pending	10/11/2023 4:47 PM	
Process	10/11/2023 1:00 PM EDT	30 minutes	Smith, James	PGXMarkers	Black Creek Pharmacy	In Progress	10/11/2023 4:46 PM	
View	10/10/2023 10:15 AM EDT	30 minutes	Adams, Susan	PGXMarkers	Black Creek Pharmacy	Completed Approval Pending	10/10/2023 12:25 AM	10/11/2023 5:15 PM
View	09/21/2023 9:45 AM EDT	15 minutes	Doe, John	Flu Vaccination	Black Creek Pharmacy	Completed	9/21/2023 1:49 AM	9/21/2023 1:54 AM
View	09/21/2023 9:00 AM EDT	30 minutes	Smith, James	Clopidogrel/Plavix	Black Creek Pharmacy	Completed Results Pending	9/21/2023 1:48 AM	10/11/2023 5:15 PM
View Results	09/21/2023 8:00 AM EDT	30 minutes	Adams, Susan	PGXMarkers	Black Creek Pharmacy	Completed Results Received	9/21/2023 1:47 AM	9/21/2023 2:30 AM

22 total records

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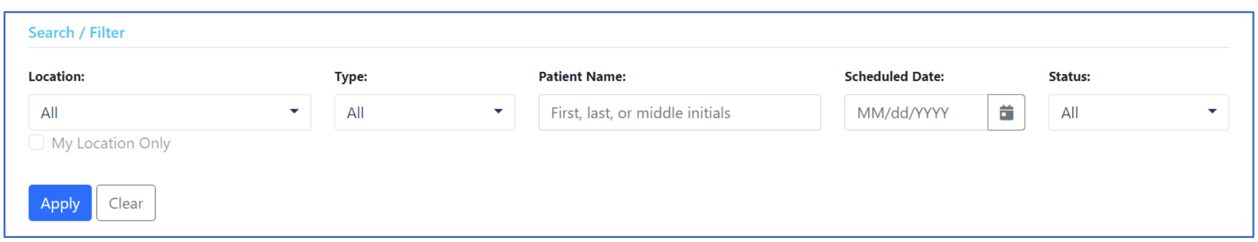
Filtering and Searching Appointments

Appointments can be filtered and searched by using the “Search/Filter” section above the appointment list. You can select values from one or more of the filter options (Location, Type, or Status), or enter a value for the Patient Name or Scheduled Date to add a filter to your appointment list. Clicking on the “Apply” button will filter your list to match that criteria. Clicking on the “Clear” button will remove any filters.



Appointment Status

Each appointment will have a status to clearly indicate its state at each point of its life cycle.

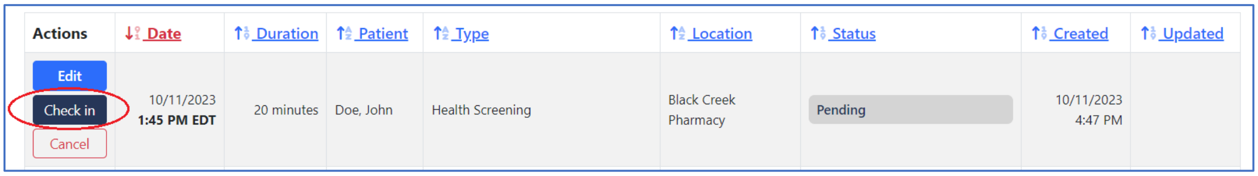
Pending	Appointments that have been scheduled but not processed yet will have a “Pending” status.
Overdue / Missed	When a patient hasn’t been checked in by their appointment time, the appointment will have an “Overdue/Missed” status.
Canceled	A patient may cancel their appointment after it has been scheduled. If this happens, the appointment will be given a “Canceled” status.
In Progress	When a patient has been checked in, or when an appointment is being processed but hasn’t been completed yet, it will have an “In Progress” status.
Completed	When an appointment that doesn’t require any processing or results from a third party has been completed, it will have a “Completed” status.
Completed Approval Pending	Some appointments (such as PGX testing) may result in a test that requires sample processing by a lab when the appointment is completed in the pharmacy. If an appointment is completed in the pharmacy, but the test is waiting on physician approval to be processed, it will have a “Completed – Approval Pending” status.
Completed Results Pending	Some appointments (such as PGX testing) may result in a test that requires sample processing by a lab when the appointment is completed in the pharmacy. If an appointment is completed in the pharmacy and the test has been approved by a physician (if necessary), but the sample is still being processed by the lab, it will have a “Completed – Results Pending” status.
Completed Results Received	Some appointments (such as PGX testing) may result in a test that requires sample processing by a lab when the appointment is completed in the pharmacy. If an appointment is completed in the pharmacy, the test has been processed by the lab, and results are available, it will have a “Completed – Results Received” status.
Requires Corrections	Some appointments (such as PGX testing) may result in a test that requires sample processing by a lab when the appointment is completed in the pharmacy. If there is a problem with the appointment details that prevents an order from being created for the lab, it will have a “Requires Corrections” status.

Check-in and Processing

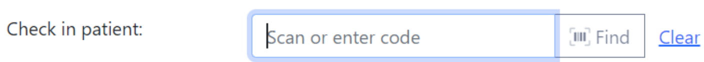
When arriving for appointments, patients can be checked in and the appointment processed.

Checking in a Patient

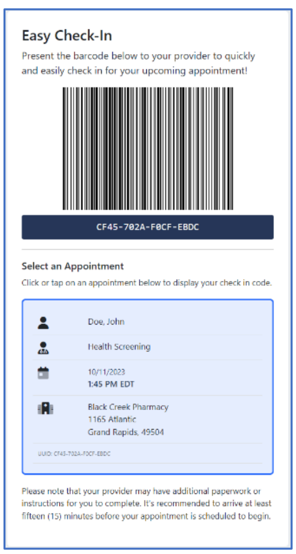
Patients can be checked in by clicking the “Check in” button on the row for that patient/appointment in the appointment grid.



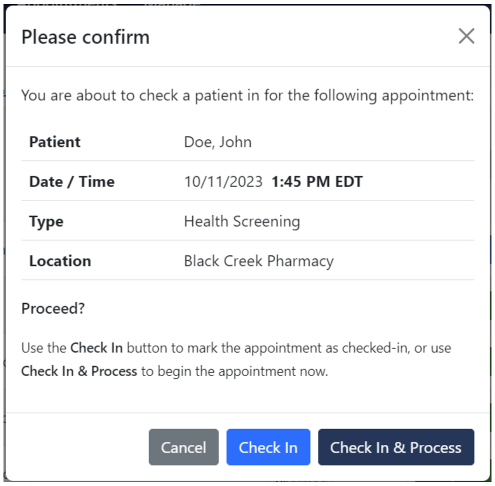
You can also scan or enter the appointment code from the patient’s mobile device if they present that code to you when they check in.



Patients can use the “Easy Check-In” process on their device by logging into their ARxConnect account and going to their scheduled appointments. Please note that the patient log in page is different from the page you use to log in.



When a patient is checked in, a confirmation page will be displayed. Clicking the “Check In” button will mark that appointment as “In Progress” and return you to the appointment page so you can finish processing the appointment later. In most cases, you’ll click the “Check In & Process” button so you can process the appointment immediately.



Processing an Appointment

Clicking the “Check In & Process” button during check in or clicking on the “Process” button on the appointment grid for an appointment that is in progress (not completed) will allow you to process that appointment.

While processing an appointment, you may view and edit any of the information that the patient entered when they scheduled the appointment. Depending on the appointment type, there may be additional “office only” fields that are available to you, some of which may be required.

Viewing Appointments

Once an appointment has been processed, you will no longer be able to make changes to the details of that appointment, but you can still view it. Clicking on the “View” button will allow you to view the details of that appointment.

Walk-in Appointments

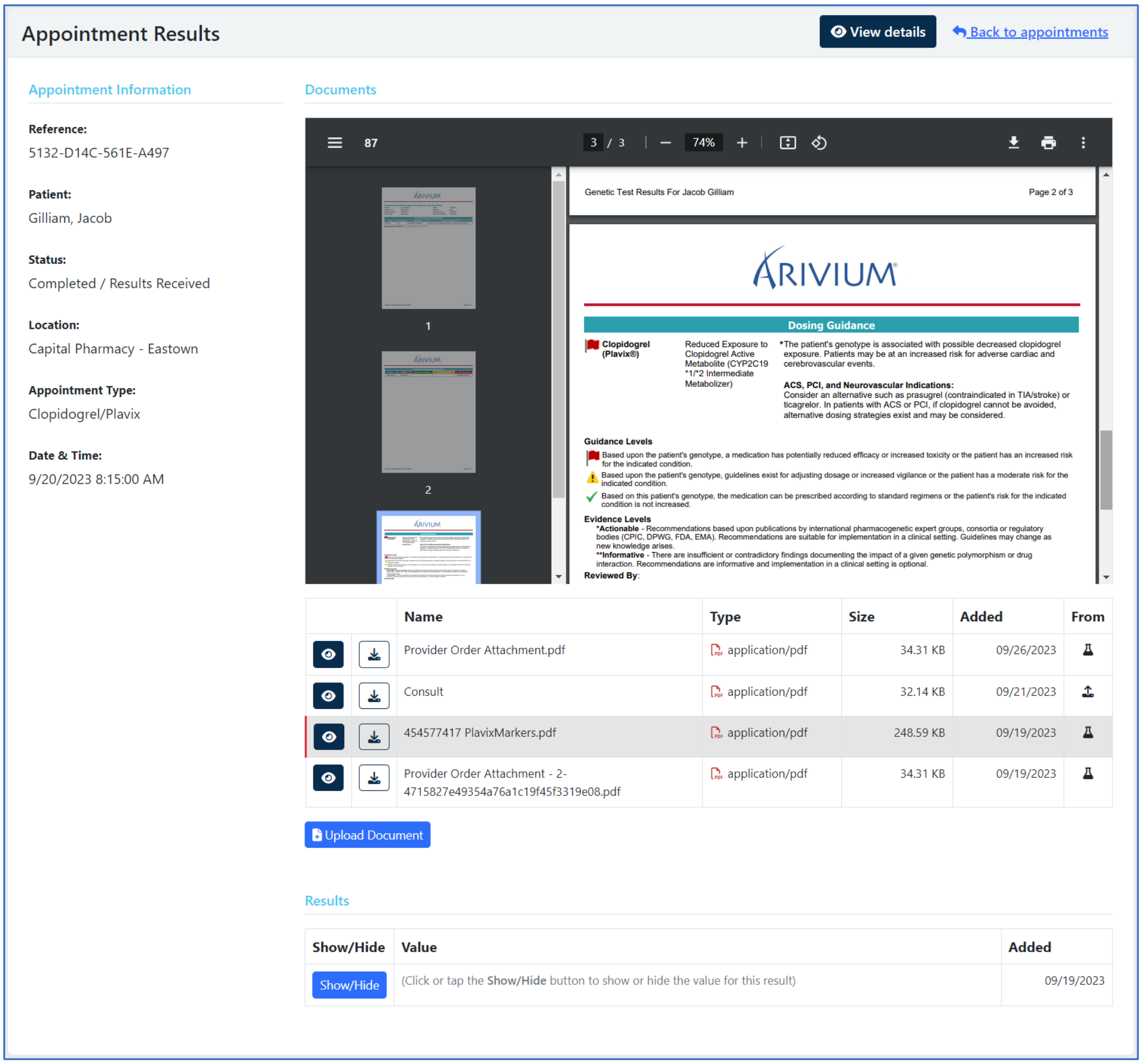
Patients need to have an appointment to process them in ARxConnect. If a walk-in patient wishes to be seen without an appointment you have a couple options. You can direct them to the ARxConnect Patient Portal where they can schedule an appointment for the next available time slot on their mobile device, or you can create an appointment on their behalf in Patient Portal.

To create an appointment on behalf of a patient, you’ll need to create an account in Patient Portal (you may want to do this ahead of time). You can use your email to do this. Once you have an account, you can log in and schedule an appointment, filling in the patient details as required. Once the appointment has been created, you’ll be able to process it in Provider Portal.

Note: Patient Portal is a separate website. Your Patient Portal URL should have been provided to you. If not, please contact Support.

Appointment Results

For appointments that result in a test processed by a lab (such as PGX testing), with results that are returned once processing is complete, you will be able to view those results in ARxConnect. Once results are available, the appointment status will change to “Completed – Results Received” and you will see a “Results” button for that appointment. Clicking on that button will take you to the Appointment Results page. There you will see any result files received from the lab, any supporting files uploaded by the patient’s provider, and any files that you may upload, such as consult reports. If the file is in a PDF format, clicking on the view document icon will allow you to view it in the report viewer. For files in another format, you may need to download them to view.

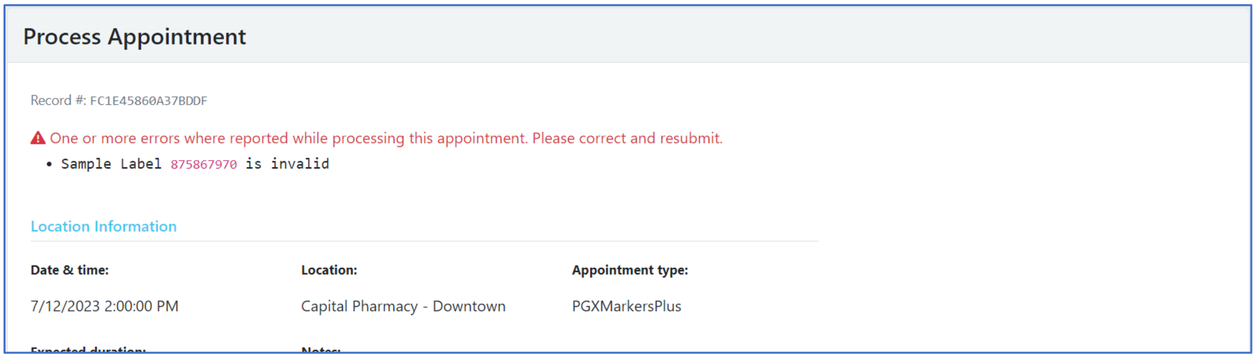


Uploading Files

For some appointments you may be required to upload files such as consult reports that will be shared with the patient’s provider. You can do that on the Appointment Results page once the test results have been received. Clicking on the “Upload Document” button will allow you to select a document to upload.

Errors

For appointments that result in a test processed by a lab (such as PGX testing), appointment data will be sent electronically to that lab. If there is a problem with the appointment details that prevents an order from being created for the lab, the appointment status will be updated to “Requires Corrections”, and you will see a “Fix Errors” button for that appointment. Clicking on that button will load the appointment, with an error message displayed at the top. You may correct that error in the appointment details and then complete the appointment again to resend the data with the corrected information back to the lab for processing.

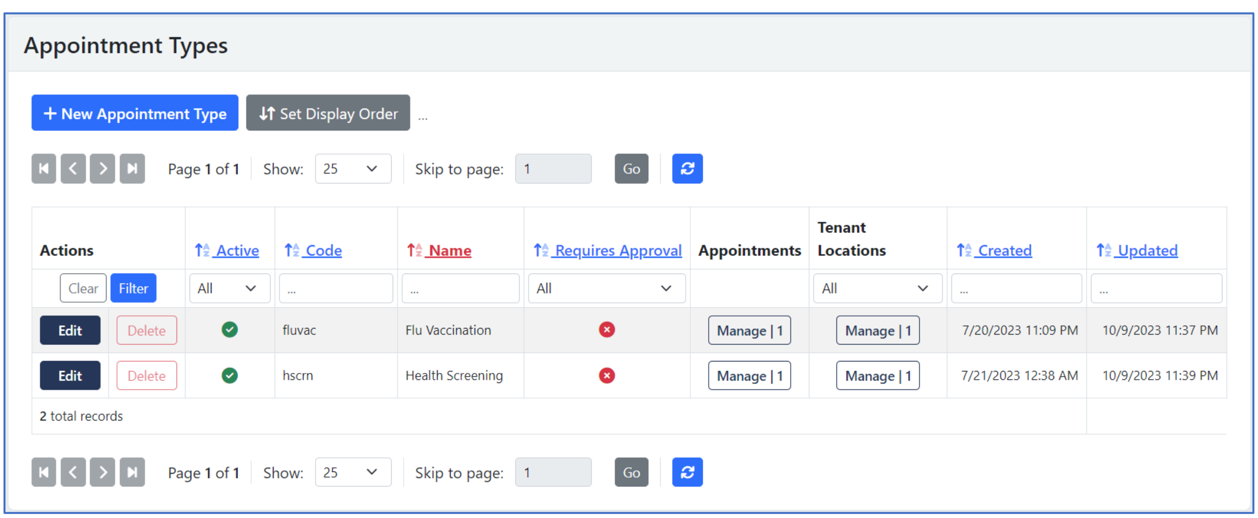


Administration

Depending on the permissions assigned to your account, you may be able to manage administrative functions in ARxConnect. These may include managing appointment types, tenant locations, payors, and users.

Managing Appointment Types

While there may be some default appointment types available to you (such as PGX testing appointments), you can also create your own appointment types for patients to select from when scheduling appointments. Any appointment types you add will be included in the list on the Appointment Types page for you to manage.



Adding Appointment Types

To add a new appointment type, click the “New Appointment Type” button. You’ll need to provide values for the following appointment type fields:

Note: Default PGX appointment types processed by Genemarkers have already been added to the system. You won’t be able to edit these appointment types, but you will be able to select them for processing at your location(s).

Name	The appointment type name is what patients will see and select from when scheduling appointments.
Code	You can use a unique short set of characters (up to 25) to represent this appointment type. This code can be used to reference the appointment type in a URL. See the section on Appointment Type URLs below.
Expected Duration	This is the amount of time you expect it to take to process this type of appointment.
Description	You can enter a description for this appointment type here.
Is Active	If this checkbox is selected, the appointment type will be active and available for patients to select when they are scheduling an appointment.
Requires Provider Approval	This checkbox is used for appointment types that result in a test that is processed externally and requires approval from a physician. This checkbox should not be checked for appointments that are processed and completed in the pharmacy alone.
Request Insurance Information	If this checkbox is selected, the scheduling form will request that the patient enter their insurance information.
Require Patient Fields	If this checkbox is selected, a patient will be required to enter responses in the following patient fields when scheduling an appointment: Name, DOB, Sex, Email, Phone, and Address. If not selected, only the patient’s name and DOB will be required.
Alternate Insurance Message	This is an optional message that can be displayed to the patient when they’re scheduling an appointment if they indicate that they are uninsured.
Consent Text	This is optional text that you can add to display for a patient to read and agree to when they schedule this type of an appointment. If no text is entered here, the default consent text will be displayed: “*By completing this form and submitting your request, you are consenting to the transmission, storage, and retrieval of the information contained herein for the sole purpose of servicing your request. To proceed, please check the box below to indicate your consent.*”
Custom Fields	Custom fields can be added to an appointment type to collect additional information from patients, or to record information when processing an appointment. See the section on Adding Custom Fields below.

Adding Custom Fields

Custom fields are not required, but if added, they will be included on the appointment form for the patient or pharmacist to fill out. To add additional fields to an appointment type, click the “Add Field” button. You’ll need to provide the following values for a custom field:

Code	You’ll need a unique short set of characters (up to 25) to represent a custom field.
Label Text	This is the text that will appear on the form for this field.
Help Text	Help text is optional, but if entered, will be displayed below the field on the form to provide additional information for this field.
Is Required	If this checkbox is selected, a value will be required in this field.
Office Only	If this checkbox is selected, this field will only be visible to pharmacists and can be used for entering additional information when processing the appointment. The patient will not see this field when scheduling an appointment.
Field Type	The field type defines what the field will look like, or the data type for the field on the form. If an Option field type is selected, you’ll also be able to define the options available to select from.

Multiple custom fields can be added to a submission type. Fields can be removed by clicking on the “Remove” button for that field, and you can use the “Reorder fields” button to change the order of the fields on the form that the patient will fill out for this submission type.

> **Note:** An appointment type must be added to a tenant location in order for patients to select it when scheduling an appointment. Please see the section on managing tenant locations.

Editing Appointment Types

Existing appointment types can be edited by clicking on the “Edit” button for that type. After making changes, click the “Save” button to save them.

Deleting Appointment Types

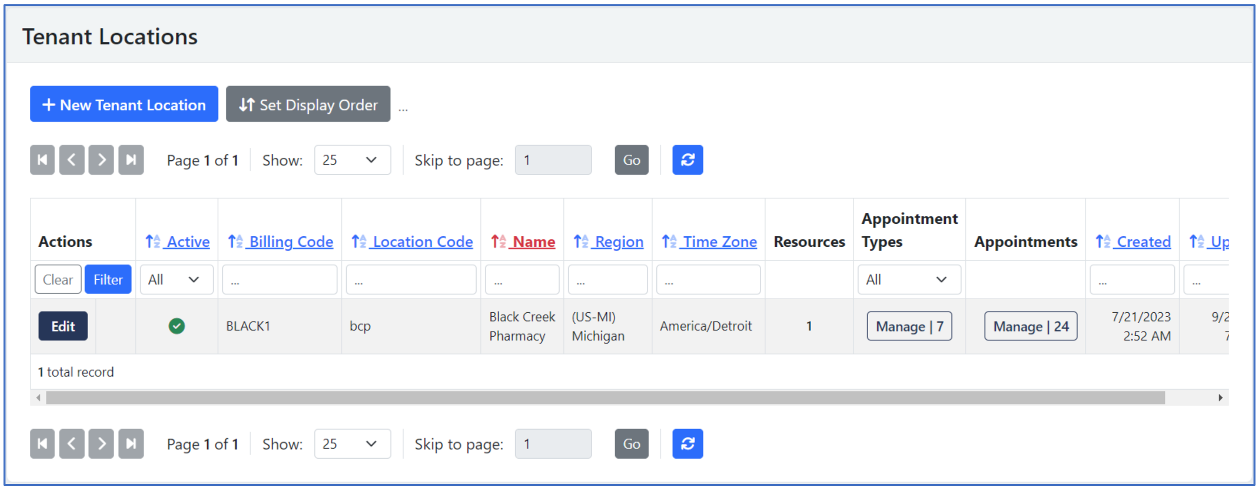
If an appointment type has not yet been used and is not assigned to a location, it can be deleted by clicking on the “Delete” button for that type.

Appointment Type URLs

Appointment types can be referenced in URLs so that patients can be directed to the appointment form with the appointment type already selected. For example, you may want to add a link to your pharmacy website that directs patients to register for a flu shot. To do this, you’ll need to use the code that was defined for the appointment type in the URL. You’ll use your ARxConnect Provider Portal URL, adding “/appointments/schedule?type=**code**” where “code” is the appointment type code.

Managing Tenant Locations

A single tenant location representing your primary pharmacy location will be set up for you in the system. If you have multiple locations, you can add additional tenant locations. If you have multiple locations, patients will have to select a location when scheduling an appointment. Any tenant locations added will be included in the list on the Tenant Locations page for you to manage.



Adding Tenant Locations

To add a tenant location, click the “New Tenant Location” button. You’ll need to provide values for the following tenant location fields:

Is Active	If this checkbox is selected, the tenant location will be active and available for patients to select when they are scheduling an appointment.
Name	The location name is what patients will see and select from when scheduling appointments.
Code	This code is a unique ID that will be assigned to you. Any additional locations will need a new code. Please contact support to obtain a code if you need to add a new location.
Location Code	You can use a unique short set of characters (up to 25) to represent this location.
Time Zone	Select the time zone for this location.
System of measurement	Select the default system of measurement for this location.
Organizational NPI	Optional - If your organization has an NPI, it can be entered here.
Provider NPI	Optional - If you have a provider NPI, it can be entered here.
Contact Information	Please enter the contact and address information for the location here.
Resources	You’ll need to add resources to process appointments. See the section on Adding Resources below.
Appointment Types	Select the appointment types that will be processed at this location. You’ll be able to choose from default appointment types (such as PGX testing appointments), and any appointment types that you have added. If no appointment

	types are selected, patients will not be able to schedule appointments at this location.

Adding Resources
Resources are used to define when appointment types can be processed at a location. For example, maybe you can only process flu shots on Tuesdays and Thursdays, or maybe you have additional pharmacy technicians available on Mondays, so you're able to process multiple appointments at the same time. To add resources to a tenant location, click the "Add Resource" button. You'll need to provide the following values for resources:

Name	This is the name for this resource. You can use something specific such as a person's name, or something more generic like "Pharmacy Tech 1".
Notes	Options – You can add some notes for your own benefit here.
Appointment types	Select the appointment type(s) that this resource is able to process during the availability you have defined.
Availability	Select the day of the week and start and end times this resource is available to process the selected appointment types. You can add multiple availability rows to define a schedule for this resource.

You can continue adding resources as necessary to define a schedule for which resources can process which appointment types, and when they can be processed at this location.

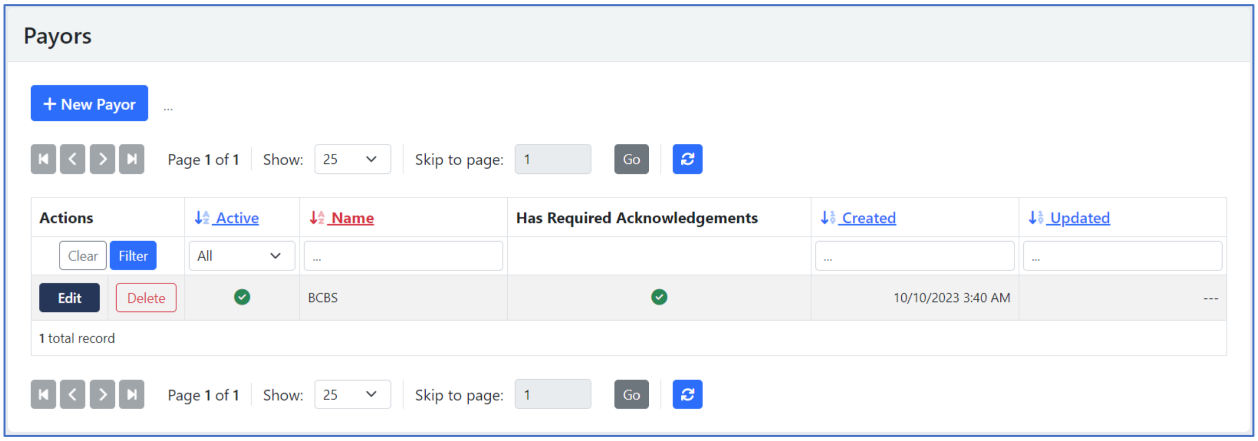
Editing Tenant Locations
Existing tenant locations can be edited by clicking on the "Edit" button for that location. After making changes, click the "Save" button to save them.

> **Note:** Please do not change the billing code for tenant locations. These have been assigned to you and changing them will prevent lab orders from being processed correctly.

Deleting Tenant Locations
If a location has not yet been used and is not associated with any appointment types, it can be deleted by clicking on the "Delete" button for that location.

Managing Payors

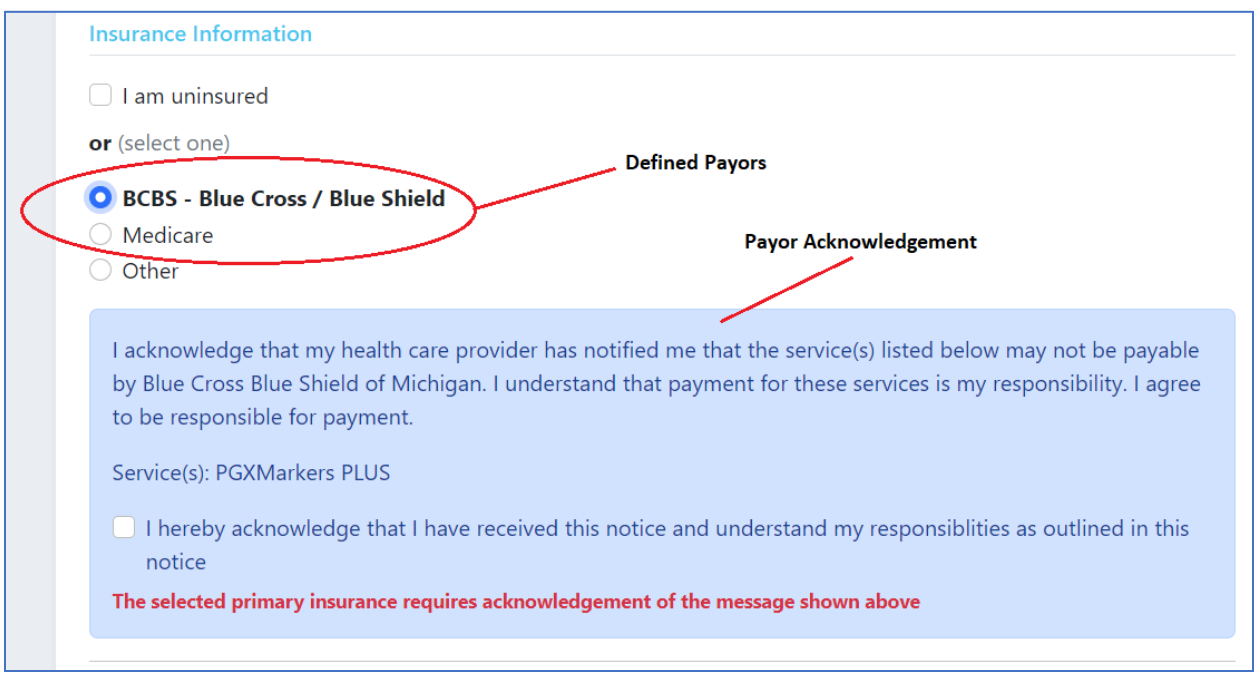
In some cases, you may have special acknowledgement requirements for certain insurers. For example, an insurer may require a patient to agree to an Advance Beneficiary Notice for a specific test. You set up those payors and acknowledgements on the Payors page.



Adding Payors

You can add a new payor by clicking on the “New Payor” button. A payor must have a name, and you can define whether it is active by checking the “Is Active” checkbox. A payor must be associated with one or more appointment types so that a patient can see and agree to the payor acknowledgement when that appointment type is selected. When adding an appointment type to the payor, you’ll be able to define the text for the acknowledgement.

When payor(s) have been defined for an appointment type, patients will see that list of payors in the insurance section on the appointment form. If they select a payor from the list, the defined payor acknowledgement will be displayed for them to agree to.



Note: Payor acknowledgements will only be displayed for appointment types that require insurance.

Editing Payors
Existing payors can be edited by clicking on the “Edit” button for that payor. After making changes, click the “Save” button to save them.

Deleting Payors
Payors can be deleted by clicking on the delete button for that payor.

Managing Provider Portal Users
You will have one initial user set up for you. That primary user will be responsible for adding any additional users for your organization.

Adding Users
You can add a new user by clicking on the “New User” button. The username should be the email address for the individual you’re adding, and the display name should be their name. If you have multiple locations, you can select the primary location for that user. You’ll need to select the permissions that you want to give to this new user to define the functions that will be available to them in ARxConnect. You have the option of either providing a password for the new user, or you can have the system send them a password reset notification.

Editing Users
Existing users can be edited by clicking on the “Edit” button for that user. After making changes, click the “Save” button to save them.

Deleting Users
Users can be deleted, but in most cases you’ll simply want to deactivate the user account to remove their access to ARxConnect. To deactivate a user, edit their account and uncheck the “Is Active” checkbox, then save your changes.

Contact Information
For issues or questions related to ARxConnect, please contact us at support@arx-connect.com.