







This Quick Reference Guide (QRG) reviews the HealthFinch – Process Patient Requested Medication Refills workflow.

## Common Buttons & Icons

### Common Buttons & Icons

 Forward	Forward button
 Launch Orders	Launch Orders button
Medication List	Medication List tab
Orders For Signature	Orders For Signature button
Sign	Sign button
Send	Send button
 3 minutes ago	Refresh icon
 Save Addendum	Save Addendum button
Request	Request tab
	Accept icon
 Delete	Delete button

## Process a Refill Request

### ➤ From the message pool:

**STEP 1:** Right-click the request; then click **Assign Item** to assign the item to yourself.

**NOTE:** When a patient requests a refill by phone, you need to forward the phone message back to the same message pool, which enables Healthfinch to provide recommendations.

**STEP 2:** Double-click the request.

**STEP 3:** Click **Forward**.

**STEP 4:** Enter the appropriate message pool in the **To** field.

**STEP 5:** Click **Launch Orders** to propose an order for the medication refill.

**STEP 6:** Click the **Medication List** tab.

**STEP 7:** **Right-click** the requested medication.

**STEP 8:** Hover over **Renew**; then click the appropriate supply and number of refills.

- The Ordering Physician window displays.

**STEP 9:** Click **Proposal**.

**STEP 10:** Enter the **Physician name**.

**STEP 11:** Click **Protocol** under Communication type.

**STEP 12:** Click **OK**.

**STEP 13:** Review the prescription details and update as needed.

**STEP 14:** Click **Orders For Signature** .

**STEP 15:** Click **Sign**.

- The order details display in the message.

**STEP 16:** Select the **Delete** check box to remove the original message from the inbox.

**STEP 17:** Click **Send**.

**STEP 18:** Click the **Refresh** icon to update the inbox.

**NOTE:** It can take up to 4 minutes for Healthfinch to scrub the patient's chart. It's best practice to review 4-5 phone messages at a time to give Healthfinch time to finish processing, then circle back to the first message.

When the request has been processed, a message from your username will appear in the inbox.

**STEP 19:** Double-click the message from your username.

**STEP 20:** Click <Add Addendum>.

**STEP 21:** Type /health.

**STEP 22:** Press [Enter] or double-click /healthfinch.

**NOTE:** The information Healthfinch scrubbed from the patient chart displays, including guidance to help you decide whether to renew the request. Items that meet protocol appear in green text. Items that do not meet protocol appear in red text. Use your judgement to either accept the request or propose a new order to the provider.

➤ To Accept the Request:

**STEP 23:** Click Save **Addendum**.

**STEP 24:** Click the **Request** tab.

**STEP 25:** Click the **Accept** icon.

**STEP 26:** Click **Sign**.

---

- The **Ordering Physician** window displays.

**STEP 27:** Enter the Physician name.

**STEP 28:** Click **Patient Care Protocol, Cosign Required** under Communication type.

**STEP 29:** Click OK.

- The Electronic Prescription Preview displays.

**STEP 30:** Click **Sign**.

- The refill request is sent to the pharmacy, and you return to the message.

**STEP 31:** Click Delete.

**NOTE:** It is best practice to delete all processed refill requests to keep the inbox clean and prevent duplicate orders.

➤ **To Propose a New Order:**

**STEP 1:** Click Save Addendum.

**STEP 2:** Click Forward.

**STEP 3:** Click Launch Orders.

**STEP 4:** Click the Medication List tab.

**STEP 5:** Click the Expand icon next to the medication requested for refill.

**NOTE:** Your original proposal displays. Before proposing a new order, you should withdraw the original proposal to reduce duplication.

**STEP 6:** Right-click the proposal; then click Withdraw.

- The proposal is removed.

**STEP 7:** Right-click the medication requested for refill.

**STEP 8:** Hover over Renew; then click the appropriate supply and number of refills.

- The Ordering Physician window displays.

**STEP 9:** Click Proposal.

**STEP 10:** Enter the Physician name.

**STEP 11:** Click Patient Care Protocol, Cosign Required under Communication Type.

**STEP 12:** Click OK.

**STEP 13:** Review the prescription details and update as needed.

---

**NOTE:** Be sure to check that the correct pharmacy displays in the Send To field.

**STEP 14:** Click Orders For Signature.

**STEP 15:** Click Sign.

- A popup displays, notifying you that order information has changed.

**STEP 16:** Click OK.

- A new message displays with the updated order details.

**STEP 17:** Select the Delete check box to remove the original message from the inbox.

**STEP 18:** Click Send.

- The message is routed to the provider for co-signature.