

# User Guide

# **Avel eCare Pharmacy Contact Information**



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**To Learn More:** https://www.avelecare.com/services/pharmacy/



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Welcome to the TRAX Trax User guide. The purpose if this guide is to train pharmacy staff to use the order management system to document order entry.

#### **Trax Access**

Trax is a web-based order management system that is accessed by following these steps:

- 1. Open internet browser [Edge, Google Chrome]
- 2. **FIRST TIME ONLY**: The first time you access Trax from your computer, you will need to register your IP address. To register your IP address, please do the following:
  - a. Go to http://www2.anteil.com/Avel/
  - b. Enter State Abbreviation, Site name, and Last name
  - c. Wait about 5 minutes
- 3. Go to internet site: https://www.averaerx.com
- 4. On the login screen, type your user name and password in the correct field and click submit. User name and password are case sensitive. You will need to change your password to have 8 characters (1 must be a symbol and it is case sensitive.) There is no limit to password attempts. If you need your password reset click the reset password button on the bottom of the page. If you do not receive an email response with a link to reset your password within 10 minutes please contact pharmacy@avelecare.com

_=TRAX=		
Username		
Password		
Login		
Reset Password		
© 1983-2022 🛧 Anteil		
_=TRAX=	before proceeding.	
You must change your passwo	before proceeding.	
You must change your password	before proceeding.	
You must change your passwo	before proceeding.	
You must change your password Current Password		

Password must contain at least one of each of the following: upper-case letters, lower-case letters

	umbers, and non-alphabetic characters
Change Password	
Current Password*	
New Password*	
Verify New Password*	
Change Password	Cancel



#### Work Queue

Once you are logged into Trax, you will need to open the work queue by following these steps:

1. Click on orders tab and select work queue. This screen shows you the order sheets for facilities that need to be processed. If you have access to multiple facilities (Avel eCare pharmacists), you will see order sheets for those facilities.

Main	Orders	Reports						
BACK	Work Qu	ieue						
	Add Ord	er						
elcom	Search	Orders						
er Na	ame facil	itv						
			-					
				-70 A V-				
				_=TRAX=				facility (Facility
Orders	Interventions R	sports		_=TRAX=				facility (Facility
	Interventions	sports		_=TRAX=				
	Interventions	ports		_=TRAX=				facility (Facility HELF) LOO
)		ports						
1	Interventions R	iports		TRAX==- ● Request has been updated.				
) / Deselect Al	Il Orders to Close							
C								
( Deselect Al	Il Orders to Close							
K t / Deselect Al	Il Orders to Close							
K t / Deselect Al ct All Desele	Il Orders to Close							
K t / Deselect All Ct All Desele Queue	Il Orders to Close ect All Close Sele	tted)		Request has been updated.	29	tient Last Patient First	Patient ID Pharmackst Com	HEF LOS
/ Deselect Al t All Desele Queue	Il Orders to Close ect All Close Sele Priority	ted					Patient ID Pharmacist Coma	REP LOS
/ Deselect Al t All) Desele Queue	Il Orders to Close ect All Close Sele	TAT Facility (0.0000 Avel Test Facility		Request has been updated.		tient Last Patient First ck Donald	Patient ID Pharmacist Com	HEF LOS
Deselect Al All Desele ueue	Il Orders to Close ect All Close Sele Priority	ted		Request has been updated.	Du		Patient ID Pharmacist Come	REP LOS

2. In the Work queue, you will see the priority, facility name, patient name, patient identification (ID), and the pharmacist comments regarding the specific order sheet. You will also have the ability to adjust the column widths and sort via the columns. The work queue screen is defined in the table below.



Field	Definition
Select	This box is checked if you would like to close the order without opening it. See section "Close Order Tool" for more information on this function.
Priority	<ul> <li>The priority of the order sheet:</li> <li>ED - An emergency department (ED) order is in the work queue that needs prospective review. This is an order sheet with a high priority.</li> <li>STAT - A stat order is in the work queue. This is an order sheet with a high priority.</li> <li>Video - A still image that requires pharmacist verification.</li> <li>Fax Fail - A notice to let you know that the fax you sent did not go through.</li> <li>Patient Consult - A notice for patient discharge counseling.</li> <li>Blank - A routine order in the work queue and will be worked in chronological order.</li> <li>ED-R - A retrospective review of an autoverified ED order.</li> </ul>
ТАТ	Turn-Around-Time: This is the time that has elapsed since the order sheet was received.
Facility	Names the facility that has order sheets that need to be processed depending on user access.
Location	The nursing station or location where the order sheet originated from.
Patient Last Name and Patient First Name	The patient name once it has been populated.
Patient ID	Displays the patient ID number/account number once it has been populated.
Pharmacist Comments	Notes about the order sheet entered by the pharmacist. The text is truncated so only the first line of comments will display in the work queue. To see all of the comments, open or view the order.
User ID	Displays the user ID who is currently processing the order sheet. If no one is processing the order this field is blank.
View	Gives a user the ability to preview an order sheet or a read-only access to an order sheet while another user is processing the order sheet.
Open	Gives a user the ability to open an order sheet for processing.



#### **Close Order Tool**

From the work queue, select the orders you would like to close by checking the box or by using the Select All button.

Main Orders I	nterventions Reports	
Select (Deselect All )	Orders to Close	
Select All teselec	TAIL Close Selected	
Work Queue		
Print		
Select Priority	TAT	Facility
STAT	0:00:03	Avel Test Facility
	19:00:21	Avel Test Facility
	0:00:03	Avel Test Facility

To close the orders, select the Close Selected button.

BACK Select / Deselect All	Reports	
Select Priority	TAT	Facility
STAT		Avel Test Facility
	19:00:21	Avel Test Facility
	0:00:03	Avel Test Facility

Your username will be the associated closer if the orders when you use the close order tool.

STAT	2023-07-03 12:37:59	Avel Test Facility	Nursing Station	Test	test		facility	
	2023-07-03 12:37:52	Avel Test Facility	Nursing Station	<b>2</b>			facility	(
STAT	2023-07-03 12:37:46	Avel Test Facility	Nursing Station	<b>E</b>			facility	
	2023-07-03 12:24:08	Avel Test Facility	Nursing Station				facility	(
	2023-07-03 12:24:00	Avel Test Facility	Nursing Station	Duck	Donald	AH1234565767	facility	l.

#### **PLEASE NOTE**

If your facility does not utilize the Trax software, but notices are sent to Trax while you are covering, please use the close order tool to close out the orders prior to Avel eCare Pharmacy starting services. If you don't do this, all orders from the day will populate our work queue and we will need to double check each order to ensure it was completed.



#### **Process Order Sheet**

Once you are in the work queue, you will follow these steps to process an order sheet.

1. Click on the Open button.

							facility	(Facility Tes
Main Orders Inter	ventions Reports							
BACK							HEL	[L000UT
ielect / Deselect All Orde	er to Olaco							
elect All Deselect All								
elect All Deselect All	Close selected							
lork Queue								
Print							Filter Search	
elect Priority	TAT Facility	Location	Patient Last	Patient First	Patient ID	Pharmacist Comments User ID	View Open	
- OTAT	0:00:12 Avel Test Facility		Duck	Donald				
STAT	0100112 Pire rest Patinty		DUCK	Donaid		facility (in use)	View	E
	19:00:30 Avel Test Facility	**Site RPh only	Mouse	Mickey		facility (in use) New Vanco	View Open	

- a. If you see multiple pages and would like to split out page(s). Please see Split order section in the Table of Contents.
- 2. Open the patient profile in the electronic medication record (EMR).
- 3. On the Edit Order screen, you will see the following fields and the order image on the right hand side of the screen. See below for field descriptions:

TR	AX= facility (Facility Test)	Select Page 1
Main Orders Interventions Reports		Select Page 1 to
BACK	HELP	
Edit Order		
Facility     Avel Test Facility       Date Received     2023-05-03 12:59:55       Location     Nursing Station ▼       unlock     Priority*       Priority*     Routine ▼       File     Choose File       No file chosen       Patient Last*     Bunny       Patient First*     Bugs       Patient ID     AH1234567       Hold     ▼	Site Info IP OP ED-Retro Renal Adjustment Policy Pharmacy to Dose Enter a X1 Dose No Flush Entry Discharge counseling by phone Med ID via eVerify Home Med ID via eVerify	Lass-283-7279 Phone 1-855-283-7279 Phone 1-866-371-7310 Routine Fax 1-855-268-3457 STAT Fax
Comments Discrepancy		
Complete Save as In Process Fax Location Sp	blit Order Add Intervention Cancel	
Order History		
E Print	Filter Search	
Modified Modified By Status Facility New O	orders Discontinued Orders Pt. Last Pt. First Co	
2023-05-         Facility Test         RPH         Avel         0           03         Action         Test         13:14:07-         Required         Facility           05         05         05         05         05         05         05	0 Bunny Bugs	



#### **Process Order Sheet**

Field	Definition
Facility	Facility location where the order sheet originated from.
Phone Icon	All facility phone numbers stored in Trax will appear in a pop up once this icon is clicked.
Location	Location within the facility where the order sheet originated from (Nursing station, CPOE, etc.).
Location Phone #	The phone number for the location where the order sheet originated from.
Location Fax #	The fax number for the location where the order sheet originated from.
Priority	<ul> <li>Defined by the fax number that the order was sent to:</li> <li>Routine</li> <li>ED - Orders that require high priority</li> <li>Stat - Orders that require high priority</li> <li>Video - Orders that require visual verification</li> <li>Patient Consult- Notice that requires patient discharge consultation</li> <li>Fax Fail</li> <li>ED-R - Retrospective review of ED orders</li> </ul>
Reason for Delay	Drop down menu will appear if the turn-around time for routine and stat orders have breached.
File	Allows a user to upload a PDF file from their desktop to the order management system.
Patient Last & First	Fields where patient name will be populated.
Patient ID	Field where the patient ID will be populated. (Please include all characters)
Comments	Notes about the order sheet entered by the pharmacist.
Discrepancy	Select this box to enter a discrepancy.
Site Info	List of facility specific information.



#### **Process Order Sheet**

To rotate the order sheet, you will right click on the right side of the screen and hover over the page until the rotation/annotation symbols appear and select one of the 2 green arrow options. When you rotate the pages, it rotates all pages the same direction if the orders have been collated. You cannot selectively rotate the pages.

See below for rotation and view symbol definitions:

Symbol	Definition	
r	Rotates the image 90 degrees	
•	Rotates the image 180 degrees	
	Magnifies the image	
Terrare Marian Marian Marian Marian	Returns image to original size	

4. Begin processing the order sheet in the EMR. To document on the orders you will use the following symbols as defined below:

Symbol	Definition
Τ	Text box - Type text on the order sheet.
1	Stamp - Predefined text that can be placed on an order sheet.
•	Green Circle - New Order.
×	Red X - Discontinued Order.
0	Orange Null Sign - No Medication Order.
DUP	Orange Dup - Duplicate Order.
	Yellow Arrow - Draw attention to something on the document.
	Blue Screen - Each medication that is discussed during patient consultation.
	(Avel eCare Pharmacists only)



#### **Process Order Sheet**

The system automatically defaults to the green circle or the new order symbol and you will left click this next to each new order that is entered/verified into the system. As you place green circles and red x's on the order page the system will automatically count your orders in the lower right hand corner of the order management software.



Change Symbols

• To change symbols you will right click and continue to hold the right click down, now hover your mouse over to the next symbol you would like to utilize and release the right click. If you change symbols while processing a page, the last symbol selected will be your default until you select a new symbol.

**Move Symbols** 

• To move a symbol, you hover over the symbol with your mouse, left click on the symbol and drag it to the correct location.

Text Box

- The text box will put 146 characters in a line and it will save the information when you click off the text box. If you do not put anything in the text box click off of the box it will leave a blue line.
- You will be able to go back into the text area and make revisions before you click Save as In Process or Complete by clicking on Edit Text.

Edit Text	]
Pharmacy	( to Dose
	Pharmacy to Dose
	87 yo M started on Vancomycin 1g IV q24h.
Cr 1.5,	Cr 1.5, CrCI~30ml/min.
Vancomy	
dose on	Vancomycin trough ordered prior to 5th dose on 7/10/23

• When you place the text on the order it will have a white background so you will be able to place the text box anywhere on the sheet.

<u>T</u>PO<u>J</u>B'<u>PP</u>h pain <u>hater</u>, <u>T</u>-<u>T</u><u>Putfs</u><u>PPN</u><u>S</u> <u>300</u>MyThe text has a white background. <u>W</u><u>The text has a white background.</u> <u>C</u><u>The text has a white background.</u>

**Delete Symbols** 

- To delete a symbol, you hover over the symbol with your mouse, left click on the symbol and drag it to the upper left hand corner of the order sheet to the black trash can that appears.
- To delete all symbols, you right click and hold and select the trash can icon.



Then you get a confirmation screen at the top of the page.

Are you sure you would you like to clear all ann	otations now	1?
	ОК	Cancel

Cancel



#### **Process Order Sheet**

5. Once you have documented the orders and made any text notations on the order you will finish processing the order. You will save the order as In Process or Complete.

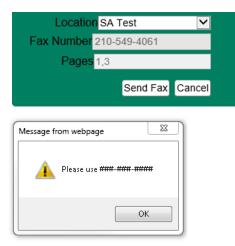
Complete Save as In Process Fax Location Split Order Duplicate Page Cancel Add Intervention

- In Process Order pending clarification to complete
  - ° To fax back your concern/clarification you will click on the Fax location button Fax Location
  - <sup>o</sup> Then a box will appear with the facility name, the nursing location, and the fax number populated, the pages you want to fax back, and then click Send Fax. To select pages, you click on the box to place a check in it.

Select Page 1 🗹 Page 3 🗹

If you would like to send to a fax number that isn't listed in the drop down menu, select "Other" in the Location drop down and then type in the 10 digit fax number in the Fax Number field.

If you type in more than the 10 digit number you will get a fax validation error prompting you to only enter 10 digits.



- Ensure you have noted comments about why the order is in process in the comments field and then click on Save as In Process.
- Complete Order completed and removed from work queue.
- Split Order To separate out page(s) of orders if they were faxed in simultaneously.
- Duplicate Page To create a duplicate page for handling multiple patients in the same facility.
- Add Intervention To add an intervention to the Trax Intervention queue.



#### Add Order Sheet

In some circumstances, you may need to add an order sheet to the work queue. For example, you do not receive an order sheet to notify you of orders pending verification and need to document your workflow. To add an order sheet, follow these steps.

1. Click on Orders tab and select add order or click Add Order from the Work Queue.

Main	Orders Reports	Main Orders Interventions Reports
BACK	Work Queue	BACK
	Add Order	
Welcom	Search Orders	Select / Deselect All Orders to Close
User Na	me facility	Add Order Select All Close Selected
		Work Queue
		E Print
		Select Priority TAT Facility

2. Select the Facility from the drop down menu.

Add Orde	r	
Facility*	•	ł
Next	Avel Test Facility	

3. Fill in the Location and Priority from the drop down menus.



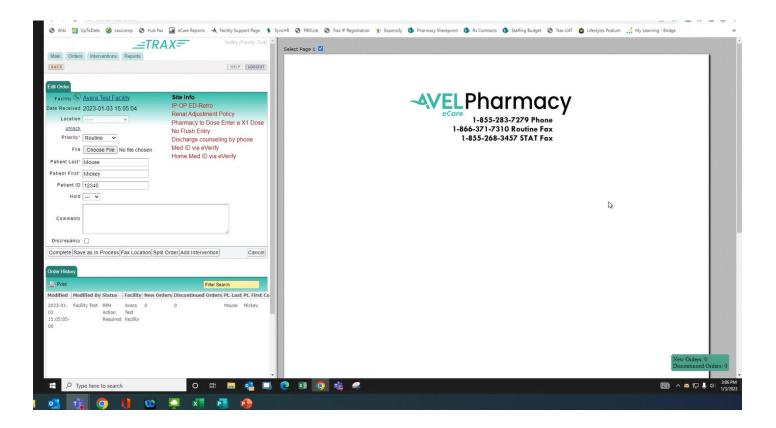
4. Fill in the patient name (Last & First), patient ID (all characters) and click Next to get a blank order sheet where you can document orders. (Fields marked with an asterisk are mandatory fields)

Patient Last*	Duck	
Patient First*	Donald	
Patient ID	AH987654 ×	
Hold	💙	
Comments		< >
Next		



#### Add Order Sheet

5. Now you are in the edit order screen and can document orders on the blank page that you are processing. You can fax the new order sheet back to a nursing station.



6. Once you have completed your documentation, save the order as In Process or Complete.



#### Add Intervention in Trax

- 1. Open order sheet from work queue or add a new order.
- 2. Process orders on order sheet and populate patient name and patient ID.
- 3. Click Add Intervention from the Edit Order Screen, your user ID will still show you are actively working on the order in the work queue.

Edit Order			
Facility Date Received Location <u>unlock</u> Location Phone#	Avel Test Facility 2023-01-03 17:32:09 Nursing Station v 605-322-2096 Routine v Choose File No file chosen	Site Info IP OP ED-Retro Renal Adjustment Policy Pharmacy to Dose Ente No Flush Entry Discharge counseling by Med ID via eVerify Home Med ID via eVerif	r a X1 Dose y phone
Patient First* Patient ID Hold	Donald 12345		
Comments Discrepancy			1
Complete Save	as In Process Fax Location Sp	lit Orde Add Intervention	Cancel

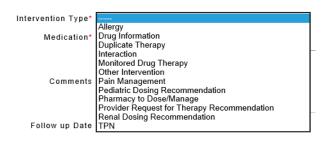
4. Now you will be brought to the Add intervention screen and your facility, patient name, patient ID, and location will be pre-populated if the name was populated in the Edit Order screen.

Add Intervention	
Facility*	Avel Test Facility 🗸
Location	Nursing Station V
Patient Last	Duck
Patient First	Donald
Patient ID	12345
Intervention Type*	<b>v</b>
Medication*	Medication Add Medication
Comments	
Follow up Date	2023-01-04 Clear
Recommendation Accepted	<b>v</b>
Save & Follow Up Save &	Complete



#### Add Intervention in Trax

5. Fill in the intervention type from the drop down menu that is applicable.



 Add the medication. You will need to add these via generic name and select them from the drop down list. Do NOT free text a medication, if a medication needs to be added, please contact Avel eCare Pharmacy at pharmacy@avelecare.com. If you are working with a combination product, you will search for the product using one of the generic names. Ex. to find Maxzide or Dyazide – Search as Hydrochlorothiazide.

Medication	hydroch ×	Add Medication
	Hydrochlorothiazide	
	Hydrochlorothiazide and Reserpine	
Comments	Hydrochlorothiazide and Spironolactone	
	Hydrochlorothiazide and Triamterene	
		2

7. Fill in the comments regarding the intervention.

Medication	Warfarin	Add Medication	
Comments		e dose of warfarin 5mg daily for history nit 2.7. Next INR 11/27	^
Follow up Date	2015-11-27 Clear		<sup>∨</sup> 0
Save & Follow Up	Save & Complete		

#### 8. Save the Intervention.

- a. If the intervention requires follow-up:
  - i. Advance the date to the date of next follow-up by clicking on the calendar.
  - ii. Click Save & Follow Up.
  - iii. Now you will be taken back to your order to finish processing.
- b. If the intervention is complete.
  - i. Click Save & Complete.
  - ii. Now an intervention summary will appear and you will need to fill in an intervention summary and click Complete.

	<u>ePharmacy</u> followed anticoagulation care plan during admission. Patient remained therapeutic during admission and discharged on a therapeutic dose.	^
Intervention Summary		
		~
	Complete	

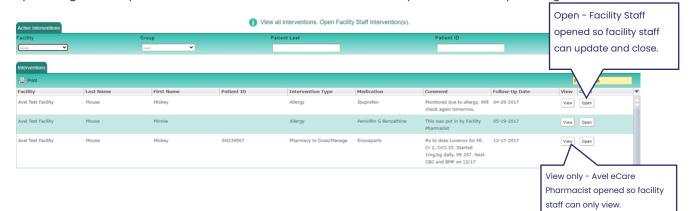


#### **View Active Interventions**

1. Click on the Interventions tab and select Active Interventions.



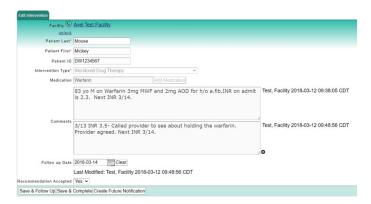
2. Now you will have a list of active interventions for your facility. They are sorted by Due Date first and then alphabetically. You will be able to see all active interventions (those started by your facility staff and by Avel eCare Pharmacy Staff). You will only be able to open interventions that have been started by your facility staff by clicking on the open button. You can view Avel eCare Pharmacy interventions by clicking on the view button.



- 3. To update a facility intervention.
- a. Click on Open



- b. You can update the patient name and patient ID at anytime so if a patient changes account numbers you can update the intervention to follow or if you accidentally entered it under the incorrect patient, you can update the name accordingly.
- c. To add follow-up information click on the 🔍 next to the comments section and a new comments section will appear.





#### **View Active Interventions**

d. You can create a notification that will show up in the work queue to guide the pharmacists to check the intervention queue for a medication level that will be back at a specific time.

Click to Create Future Notification



Select the date/time that you want the notification to show up in the work queue and add a note in the comment to guide the pharmacist to the intervention and hit Save Notification.

Date	
Time 00:00:00	
Comment	
	Save Notification Cancel

You will get a confirmation that the future notification is set to show up in the work queue.

Saved	
The F	uture Notification has been saved

And then it will drop in the queue at the bottom of the queue with the note you added to the comments so the pharmacists will come across it like regular workflow vs. having to sift through all the notes at the top of the queue.

Select / Desele	ct All Orders to Close		() Re	quest has been updated.								
Add Order	select All]Close Sele											
	select All Close Sele	cted										
Work Queue										Filter Search		
Select	Priority	TAT Facility		Location	P	atient Last	Patient First	Patient ID	Pharmacist Comme	nts User ID Vie	w Op	en 🔻
•	0	:04:28 Avel Test Facility								Vi	tw 0;	ien
	0.	Avel Test Facility			н	louse	Mickey			Vi	rw Op	Jen
	•	200:02 Avel Test Facility		Nursing Station	D	uck	Donald	AH1234565789	Vancomycin trough	Vi	tw Og	Jen

#### e. If the intervention is complete

- i. Click Save & Complete
- ii. Now an intervention summary will appear and you will need to fill in an intervention summary, if the recommendation was accepted, and click Complete.

ePharmacy followed anticoagulation care plan during admission. Patient remained therapeutic during admission and discharged on a therapeutic dose.	^
	~
Complete	
	admission. Patient remained therapeutic during admission



#### **Re-Open a Closed Intervention**

You can re-open an intervention within 72 hours of close if it was accidentally closed in error.

- 1. Search for the intervention.
- 2. Select the facility and select your dates and click search.

Search Interventions				View all interventions.	Open Facility Staff Inte	ervention(s).			
Facility	Group		Include Active Interventions	Start Date*	End Date*	Patient Last	Patient ID	_	Clear
Avel Test Facility 👻		~	2	2023-06-06	2023-07-06				Search

3. The interventions for the facility will be listed below and you can select Re-Open.

Search Interventions			<ol> <li>View all interventions.</li> </ol>	Open eCare Pharma	cist Intervention(s).			
Facility		Group In	clude Active Interventions	Start Date*	End Date*	Patient Last	Patient ID	Clear
	~	eCare Pharmacist 👻		2023-06-06	2023-07-06			Search
Interventions								
Print Print							Filter Search	
Facility	Last Name	First Name	Patient ID	Intervention Type	Medication	Creation Date	Status View Open	<b>v</b>
Avel Test Facility	Duck	Donald	AH1234565767	Pharmacy to Dose/Mana	ge Vancomycin	07-06-2023	Complete View Re-Open	÷

4. Now you can click on the plus sign and add additional notes if the intervention accidentally got closed.

Edit Intervention	
Facility 🕓	Avel Test Facility
unlock	
Patient Last*	Duck
Patient First*	Donald
Patient ID	AH1234565767
Intervention Type*	Pharmacy to Dose/Manage
Medication	Vancomycin Add Medication
	87 yo M started on Vancomycin 1000mg IV q24h for cellulitis, 66 inches, La 68kg, Cr 1.5, CrCl~30ml/min, t 1/2 23h. Vanco trough ordered prior to 5th dose.
Comments	
	ID consulted and <u>wants</u> to shoot for an AUC of 500-600
Follow up Date	2023-07-07 Clear
	Summary
Intervention Summary	
	Last Modified:
Recommendation Accepted	Yes •
Save & Follow Up Save &	Complete Create Future Notification



#### Add Discrepancy

Discrepancies are defined as order entry discrepancies or medication errors. If you come across an issue when you are reviewing work and need to document a discrepancy, you can do this in one of 2 ways.

- 1. Add a discrepancy directly into Trax. Discrepancies are attached to an order, so you can add a discrepancy to:
  - to an order that is in Trax or
  - to a new order that you add in Trax
- 2. Manually complete the Discrepancy Form and fax form into Trax.

## Add discrepancy to an order in Trax (new or in process)

1. Click the Open button from the work queue.

Work Queue											
🚊 Print									Filter Sear	ch	
Select	Priority	TAT	Facility	Location	Patient Las	Patient First	Patient ID	Pharmacist Comments	User ID	View	Open 🔻
8			Avera Test Facility	Nursing Station	test	test			In Use - admin	View	
		0:00:00	Avera Test Facility	Nursing Station	Mouse	Mickey	AH1234567			View	Open

2. On the edit order screen fill in the patient name, ID, Location, etc. Please note that if you search for the order 24 hours after completion, you will not be able to see the discrepancy fields so you may want to note discrepancy in the 1<sup>st</sup> comments field for tracking purposes.

Main Orders	Reports
BACK	HELP
Edit Order	
Facility	Avera Test Facility
Date Received	2016-09-13 13:26:09
Location	Nursing Station
ocation Phone#	605-322-8541
Location Fax#	605-322-2096
Priority*	Routine •
File	Choose File No file chosen (PDF Files only)
Patient Last	Mouse
Patient First*	Mickey
Patient ID	AH1234567
Hold	▼
Comments	
Discrepancy	
Complete Save a	as In Process Fax Location Add Intervention Cancel

3. Click in the discrepancy box and the discrepancy fields will appear.





## Add discrepancy to an order in Trax (new or in process)

4. Click the appropriate radio buttons, enter the medication involved from the search box (Please contact <u>pharmacy@avelecare.com</u> to have a medication added. Please do not free text the medication).

Select the pharmacist involved from the drop down menu, fill in information that concisely describes the discrepancy and any confounding factors.

Eacility 🕓	Avel Test Facility	Site Info	O Wrong patient	
unlock		IP OP ED-Retro	<ul> <li>Wrong drug/product</li> <li>Wrong dose</li> </ul>	
	2023-07-03 12:24:00	No Flush Entry	O Wrong directions (sig/freq) O Wrong route	
<u>unlock</u> Location Phone# Location Fax# Priority*	Nursing Station	Discharge Counseling Home Med ID via eVerify scope, pending scor	Vitrong IV rate Duplicate entry Unapproved abbreviation Med entry omitted Med distorn ond ordered Med discontinued without order Vitrong time Formulary sub not used Vitrong duration therapy Other Centributing Factore	
Patient Last <sup>*</sup> Patient First <sup>*</sup> Patient ID	Duck		Policies     Legitity     Processes     Lack of Training     Computer Software     Inadequate Patient Info     Other	
Comments Discrepancy	2	l.	No Harm to Patient     Additional Patient monitoring needed     Change in Vtas Signsheed for lab work     Treatment needed/increase in stay     Permanent Patient Harm     Intensity Medical Care     Cause or contribute to Death	
O Med Doses Medica	ancy er Entry Discrepancy lication Error received tion Involved ancy Medication		Pharmadist Involved Comments	

5. Now you can save the order as complete.



#### Add a discrepancy to an added order.

- 1. Add an order to the work queue (see table of contents for directions on adding an order).
- 2. On the edit order screen fill in the patient name, ID, Location, etc. Please note that if you search for the order 24 hours after completion, you will not be able to see the discrepancy fields so you may want to note discrepancy in the 1<sup>st</sup> comments field for tracking purposes.

Edit Order		
	Averal Telef Face When	Site Info
	Avel Test Facility	IP OP ED-Retro
<u>unlock</u> Date Received	2023-07-03 12:24:00	No Flush Entry
Location <u>unlock</u> Location Phone#	Nursing Station V	Discharge Counseling Home Med ID via eVerify
Location Fax#	605-322-2096	
Priority*	Routine 🖌	
Reason for Delay*	Orders Outside Service (not	in scope, pending scor 🗸
File	Choose File No file chosen	1
Patient Last*	Duck	
Patient First*	Donald	
Patient ID	AH1234565767	
Hold	¥	
Comments		
Discrepancy		
⊖ Med Doses Medica	ancy er Entry Discrepancy ication Error received tion Involved ancy Medication	

3. Click in the discrepancy box and the discrepancy form will appear.

crepancy 🗹	
Discrepancy	
Order Entry Discrepancy	
Medication Error	
Doses received	
Medication Involved	
ins ×	
Insulin Preparations	
What Happened?	
OWrong patient	
OWrong dose	
Wrong directions (sig/freq)	
<ul> <li>Wrong route</li> </ul>	
O Wrong IV rate	
O Duplicate entry	
OUnapproved abbreviation	
<ul> <li>Med entry omitted</li> </ul>	
O Medication not ordered	
Med discountinued without order	
O Wrong time	
<ul> <li>Formulary sub not used</li> <li>Wrong duration thereast</li> </ul>	
OWrong duration therapy	



#### Add a discrepancy to an added order.

4. Click the appropriate radio buttons, enter the medication involved from the search box (Do NOT free text the medication in. Contact <u>pharmacy@avelecare.com</u> to have a medication added). Select the pharmacist involved from the drop down menu, fill in information that concisely describes the discrepancy and any confounding factors.

Facility Site Info	OPolicies
unlock IP OP ED-Retro	OLegibility
te Received 2023-07-03 12:24:00 No Flush Entry	Processess
Discharge Counseling	O Lack of Training
Location Nursing Station  Home Med ID via eVerify	Computer Software
unlock	O Inadequate Patient Info
	Other
cation Fax# 605-322-2096	O Outor
Priority* Routine 👻	
Reason for Orders Outside Service (not in scope, pending scor +	Severity
Delay"	No Harm to Patient
File Choose File No file chosen	OAdditional Patient monitoring needed
atient Last' Duck	O Change in Vital Signs/need for lab work
	O Treatment needed/increase in stay
atient First" Donald	O Permanent Patient Harm
Patient ID AH1234565767	Intensive Medical Care
Hold V	Cause or contribute to Death
Hold	
	Pharmacist Involved
Comments	Adams, John 🗸
	Comments
ß	Novolog sliding scale entered
Discrepancy 🖾	as 4 times daily versus before
Discrepancy	meals as ordered.
Order Entry Discrepancy	
Medication Error	
Doses received Medication Involved	The second se
Discrepancy Medication	Complete Save as In Process Fax Location

- 5. Click next.
- 6. Now you can save the order as Complete.



#### View an Order

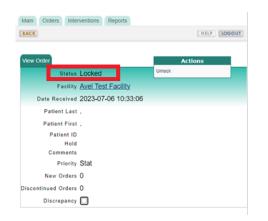
In some instances, you may need to access an order sheet that is being processed by another user. For example, you may want your co-worker to review the order with you to discuss clinical matters. Order sheets can be viewed simultaneously, but can only be processed by one user.

To view an order sheet that is being processed by another user, follow these steps.

1. From the work queue you will click the view button of the order you wish to view. You will know someone is processing the order because the User ID field will be populated and the open button is not available.

Select / Deselect All Order	s to Close						
Select All Deselect All	Close Selected						
Work Queue							
📇 Print							Filter Search
Select Priority	TAT Facility	Location	Patient Last	Patient First	Patient ID	Pharmacist Comments User ID	View Open
🗆 ED	0:02:28 Avel Test Facility	Front Desk	Skywalker	Luke	34567		View Open
STAT	0:02:28 Avel Test Facility	OB Unit	Duck	Donald	23455	Clarify warfarin dose	View Open
	0:02:31 Avel Test Facility	Nursing Station	Mouse	Mickey	12345	facility (in use)	View

2. This will take you to the view order screen where the facility information will be on the left side of the screen and the order sheet will be on the right hand side of the screen. You will see the status of the order is locked so you cannot make changes to the order.



3. To back out of the order and get back to the work queue, you will select the back button in the upper left corner of the screen. Do NOT use the back arrow on your browser.



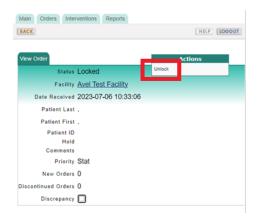


#### To View and Unlock an Order

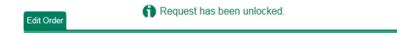
1. From the work queue you will click the view button of the order you wish to unlock. You will know you are processing the order because the User ID field will be populated with your user ID and the open button is not available.

Select / Deselect All Order	s to Close						
Select All Deselect All	Close Selected						
Work Queue							
📇 Print							Filter Search
Select Priority	TAT Facility	Location	Patient Last	Patient First	Patient ID	Pharmacist Comments User ID	View Open
🗆 ED	0:02:28 Avel Test Facility	Front Desk	Skywalker	Luke	34567		View Open
□ STAT	0:02:28 Avel Test Facility	OB Unit	Duck	Donald	23456	Clarify warfarin dose	View Open
	0:02:31 Avel Test Facility	Nursing Station	Mouse	Mickey	12345	facility (in use)	View

- 2. This will take you to the view order screen where the facility information will be on the left side of the screen and the order sheet will be on the right hand side of the screen.
- 3. To unlock the order, you will click on unlock in the actions area. Please note: You are only able to unlock your own order. If you need to unlock someone else's order, please contact Avel eCare Pharmacy to have someone with administrative privileges unlock the order.



4. Now you will have control of the order which is identified by the message "Request has been unlocked" and you have been redirected to the edit order screen where you can update the patient name, comments, etc.



- 5. Process the orders on the sheet and document your work as described previously utilizing the symbols.
- 6. Save the order as In Process or Complete.

## To Change a Facility (Avel Staff Only)

To change the facility if the wrong one was selected.

Click unlock under the Facility Name.
 Click on the drop down and select the correct facility.
 Click on the drop down and select the correct facility.

~



#### Search Orders

Order sheets faxed or created in Trax will be retained for up to ten years. You can search for orders during a date range, by facility, pharmacist who completed the order, patient, and patient ID. You can further narrow your search by using the filter search.

To search orders within Trax you will follow these steps.

1. Click on the orders tab and select search orders.

Main	Orders Interventions	
BACK	Work Queue	
_	Add Order	
Work a	Search Orders	
Facility	Close Order Tool	Patient
	×	

2. Now you will be brought to the Search Orders queue.

Main Orders Interventions									HELP	FIRST
BACK									HELP	1000
iearch Orders										
acility	Pharmacist		Include New/In-Pro	cess Orders?	Start Date		End Date			Clear
🔽		$\mathbf{\mathbf{v}}$			2015-10-25	00:00:00	2015-1	1-25 23:59:59		earch
atient					Patient ID					
irst Sort:			Second Sort:			Thin	d Sort:			
V			💌				~			
iearch Orders										
Print									Filter Search	
riority Status Creation Date	Facility		Location	Patient	Patient ID	Pharmacist Comments		User ID	View Open	
				There are n	o results to display.					

3. You can search multiple ways within the search queue and your results will vary depending on your access.

The search options are independent of the filter search.

The default search includes New/In Process orders, to see only the completed orders, uncheck the New/In Process box.

Main Orders Interventions BACK	Reports							HELP	LOGOUT
Search Orders									
Facility	Pharmacist		Include Active Orders	Start Date		End Date		Cle	ear
Avel Test Facility 🗸		~		2023-01-02	00:00:00	2023-01-03	23:59:59	Sea	
Patient Last									
Patient ID									
			<b>v</b>			¥			
Search Orders									
📇 Print								Filter Search	
Priority Creation Date	Facility	Location	File	Patient Last	Patient First	Patient ID Pha	rmacist Comments User ID	View Open	T

4. After selecting your search queries, click search for your results. Your results will come back with the newest creation date at the top and the oldest at the bottom. The system will retrieve 500 results per query.



#### Search Orders

- 5. To view the queried results (multiple options).
  - a. Click on the open box to see the order with the annotations. Please note you will lose your search criteria if you click the view or open option when you click the back button. The discrepancy fields will also show during the first 24 hours when you view or open the order. Do NOT update the discrepancy fields or re-open the discrepancy, if you need to submit additional information about the discrepancy, please email it to <a href="mailto:pharmacy@avelecare.com">pharmacy@avelecare.com</a>
  - b. If you would like to see the order with annotations but not lose your search criteria, left click on the .PNG file and the order will open in a new window, this view will not show the discrepancy fields. Do NOT double click on the icon since your system will not function properly.

Search Or	rders										
📕 Print											
Priority	Creation Date	Facility	Location	File	Patient Last	Patient First	Patient ID	Pharmacist Comments User ID	Vie	w Open	Ŧ
	2023-07-06 10:33:31	Avel Test Facility	_						Vi	w Open	÷
STAT	2023-07-06 10:33:06	Avel Test Facility							Vi	Open	1
	2023-07-03 12:38:05	Avel Test Facility	Nursing Station						Vi	w Open	

## Open a Completed Order

You are able to open a completed order that you closed within 24 hours of the order being completed.

To open a completed order, go to the Search Queue and click the "Re-Open" button. (This button will only show up for orders that you have closed within the past 24 hours)

Search Or	ders									
acility		Pharmacist	Include A	ctive Orders	Start Date		End Da	te		Clear
Avel Tes	t Facility 👻		✓		2023-03-01	• 00:00:00	2023-	07-06 23:59:59		Search
Patient La	st									
Patient ID										
irst Sort	¥		Second	Sort:			Third Sort:	]		
Search Or	ders								Filter Search	
Priority	Creation Date	Facility	Location	File P	atient Last	Patient First	Patient ID	Pharmacist Comments User 1	ID View	Open
	2023-07-06 10:33:31	Avel Test Facility		· · ·					View	Open
STAT	2023-07-06 10:33:06	Avel Test Facility		- E					View	Open
	2023-07-03 12:38:05	Avel Test Facility	Nursing Station						View	Open
STAT	2023-07-03 12:37:59	Avel Test Facility	Nursing Station	۳ 🔛	iest	test		facility	View	Re-Open
	2023-07-03 12:37:52	Avel Test Facility	Nursing Station	<b>.</b>				facility	View	Re-Open

You can then edit the order as needed and either save in process or complete the order. If the discrepancy box is checked and the fields are filled in, do NOT update them. If you need to send information that needs to be updated, please send the information to <u>pharmacy@avelecare.com</u>



#### **Splitting Collated Notices Apart**

If you ever need to separate out certain notices, you can now split them out as an individual notice or a new group of notices depending on how you select the pages within the notice.

1. Select the page(s) you would like to separate out by clicking in the box on top of the order.

Select Page 1 🗹		
	1-866-371-7310 Routine Fax 1-855-268-3457 STAT Fax	

2. Click on Split Order

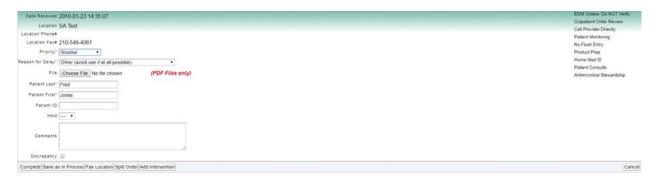
	~			
Complete Save as In Process	Fax Location	Split Order	Add Intervention	

Now a box appears with the selected pages listed in the split pages field.



- 3. Click on Split Order.
- 4. Now you will go to the work queue and find the orders as separate notices.

If you hit split order on a single page notice, it will create 2 place holders (1 you are unable to annotate on (see screenshot below) and a second notice that you can annotate on) in the queue with the same received date and time stamp.



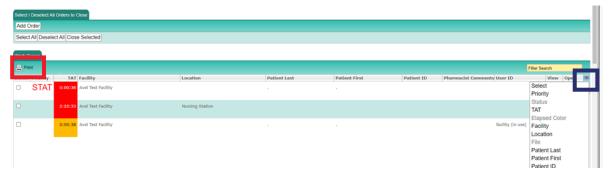


#### Printing an Order

#### From the Work Queue

You will notice a print icon in the work queue (in the red box below). This will only print the image of the work queue. It is of no use in printing order images.

Click on the down arrow on the far right side of the work queue menu (in the blue box below).



This drop down menu will display. Notice the word File is grayed out by default. If you click on File and then click back on the down arrow to close the drop down menu, you will notice that a column for File is inserted into the gray menu bar in the work queue and an icon displays below it in each order line.

Filter Search
Open 🔻
Select
Priority
Status
TAT
Elapsed Color
Facility
Location
File
Patient Last
Patient First
Patient ID
Medications
Pharmacist Comments
Ticket
User ID
Fax Number
Caller ID
Subject
Message
Barcodes
Priority
View
Open

Click on the icon under File (in the blue box above) and the order image will appear in a new tab. You can then print this image.

#### **From Edit Orders**

You can use the Fax Location function to fax the order document to your fax machine.

#### **From Search Orders**

You will notice that the File column displays by default in Search Orders. This was intentionally included as a feature in Search Orders to aid with quick review of completed orders. You can simply click on the icon under File to display the order in a new tab and print



#### **Order Volume Report**

You have the ability to run an order volume report to see, by hour, how many orders were completed by either your staff or by Avel eCare Pharmacy.

1. Click on the Reports Tab and Select "Order Volume Report".

Main Orders	Reports	
BACK	Report Queue	( HLP   LOBOUT)
	Fax Log Report	Welcome to Avera Trax
Welcome Facility T	Order Volume Report	VIECONE ID AVERA ITAX
User Name facilit	Ŋ	

- 2. Select Your Facility and Enter Report Parameters.
  - a. User Group:
    - i. Facility Staff = your team
    - ii. Avel eCare Pharmacist = Avel eCare Pharmacy staff
- 3. Click Run Report.
- 4. You will be brought to the Report Queue Tab. This Tab lists all the reports that have been run. The most recent report will be listed at the top.

Main Or	ders Reports					
ACK						
Report Que	90					
Delete	Report/Output Name	0	Description	Run Date	Size	
Select All	Order Volume Report 8	s) (	Order Volume Report	05/25/2016 10:16:47	5.6k	
Select None	□ FAX RECV LOG - 20160519	1.8		05/19/2016 12:16:29	107.4k	
	Order Volume Report	s) (	Order Melume Depend	05/19/2016 12:14:00	4.4.46	

5. Click on the Excel Icon to open the report.

You may get a prompt similar to the one below. Click on "Open"

nterne	t Explorer	23
Wha	at do you want to do with report.xls?	
Size:	5.50 KB	
	Microsoft Excel 2003 : 198.22.99.143	
•	Open The file won't be saved automatically.	
•	Save	
•	Save as	
		Cancel

6. Report will open in Excel.



#### Shift Summary Report

You have the ability to run a daily report to see, how many orders were completed by Avel eCare pharmacy staff, how many orders are still in progress that require follow-up, and how many interventions were placed during a site pharmacist's absence. This report is used as a communication handoff from the Avel eCare pharmacist team to the site pharmacist.

1. Click on the Reports Tab and Select Shift Summary.

Main Orders Interventions	Reports	
BACK	Report Queue	
	Shift Summary	
Welcome Facility Test	Order Time Summary Report	
User Name facility	Order Volume Report	

2. Select your facility from the drop down menu. Click Search.



3. The system will give you 72 hours worth of information based on the shift start. The report runs for the hours of coverage we are scheduled to cover. In the example below, it breaks up Monday into 2 reports based on the hours being 24/7 on a Sunday and then showing the site coming back on at 8:30 on Monday morning.

Facility Shift History			
🐣 Print			Filter Search
Shiftstart	Shiftend	Report	Ψ
2021-01-26 16:30:01-06	2021-01-27 08:30:01-06	View Report	8
2021-01-25 16:30:01-06	2021-01-26 08:30:01-06	View Report	
2021-01-25 00:00:01-06	2021-01-25 08:30:01-06	View Report	
2021-01-24 00:00:01-06	2021-01-24 23:58:01-06	View Report	

4. Click on View Report.

Facility Shift History			
📇 Print			Filter Search
Shiftstart	Shiftend	Report	<b>v</b>
2021-01-26 16:30:01-06	2021-01-27 08:30:01-06	View Report	
2021-01-25 16:30:01-06	2021-01-26 08:30:01-06	View Report	
2021-01-25 00:00:01-06	2021-01-25 08:30:01-06	View Report	
2021-01-24 00:00:01-06	2021-01-24 23:58:01-06	View Report	

5. Now you will be presented with a shift summary hand off report. This report shows the number of orders verified, the breakdown of orders per patient, the orders that are still sitting in the queue that need to be clarified or communicated to the site pharmacist for additional follow-up, the number of video encounter (if you have still image services), and the new interventions that were placed by Avel eCare pharmacists.

	Total Number of	Orders Verified	
Priority	Number of Orders		
	Orders pe	r Patient	
Patient Name	Number of Orders		
	Notifications	In-Process	
Patient Name	Comments		
	Total Number of V	ideo Encounters	
Туре	Number of Orders		
	Interve	ntions	
Patient Name	Intervention Type	Medication	Status

2021-01-25 00:00:01-06 - 2021-01-25 08:30:01-06



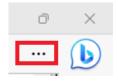
## **Tips and Helpful Hints**

#### **Clear Cache**

After software updates or if you are having system issues, please follow these steps to clear your cache from the computer.

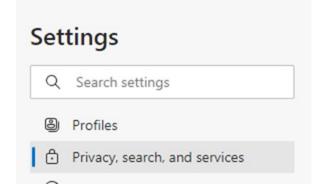
#### Clear the Cache in Edge.

- 1. Click on the ellipsis(...) in the upper right corner of the web browser.
- 2. Click on settings.



Í		New tab		Ctrl+T	
		New window		Ctrl+N	
l	[;	New InPrivate window	Ctrl+	Shift+N	
		Zoom —	110%	+	2
	દ'≡	Favorites	Ctrl+	Shift+O	
	9	History		Ctrl+H	
	$\underline{\downarrow}$	Downloads		Ctrl+J	
	Bô	Apps			>
	3	Extensions			
	Ş	Browser essentials			
	Ø	Print		Ctrl+P	
	Ø	Web capture	Ctrl+	Shift+S	
	බ	Find on page		Ctrl+F	
I.		More tools			>
	ŝ	Settings			
ľ	?	Help and feedback			>
		Close Microsoft Edge			
	Ô	Managed by your organization	1		

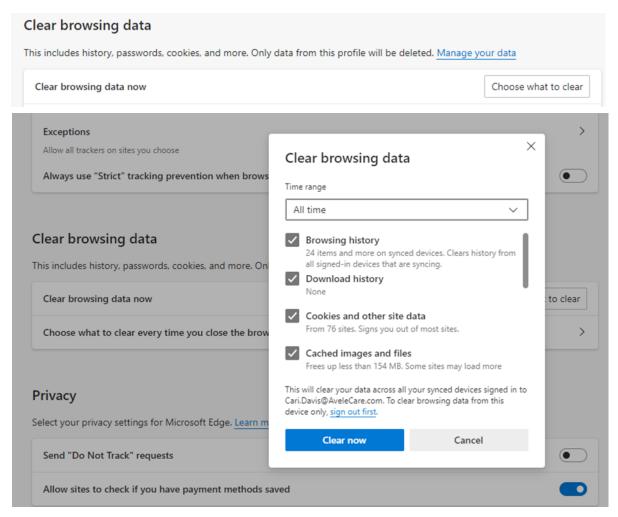
3. Click on Privacy, search, and services.





## **Tips and Helpful Hints**

4. Click on Choose what to clear and then click Clear now.



#### Google Chrome- Clear Browsing History (If you don't use Chrome, skip these instructions)

1. Click on the 3 vertical dots to the right of the address bar.





## **Tips and Helpful Hints**

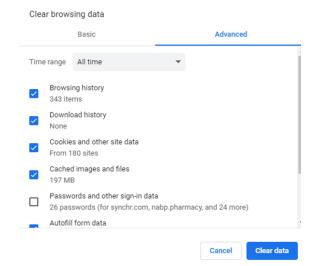
2. Click on settings.

< → C Q (0		@ \$ 0 \$ 1
🗞 https://www.ustant ᢞ Weike 🛞 Wile-Avera Trac Help 📙 Imported From E 💲 SIDP - Vencomy	yah 🙀 Reportunation 52 🖇 Walama is Sprat 🧿 Help Davis 🥥 Polingsker 👩 Insta 👫 Diemoport 😵 PEC-Premiery 🚡 el-All Premiery Fa 🤅	New tab     Cht+T     New window     Cht+N     New incognito window     Cht+Shift+N
		History Deventeeds Cori+1 Bookmarks Estensions
		Zaam - 100% - 🕻
	Google	Print., Ctrl+P Cart.,
	Judgie	Find Ctrief
		More tools
		Cut Copy Parts
	Q. Search Google or type a URL	Settings Help
		fat
	0 0 5 0	Managed by your organization

3. Click on Privacy and security > Clear browsing data.

-	Settings
	You and Google
â	Autofill and passwords
	Privacy and security
ð	Performance
	Appearance
	Search engine
	Default browser
0	On startup
L	anguages
	vnloads
Dow	
	ccessibility
A	Accessibility System

4. Select Browsing history, download history, cookies and other site data, cached images and files, and autofill form data and click on Clear data.





## **Tips and Helpful Hints**

5. Now you can type in www.averaerx.com in the address bar.

#### Order sheet doesn't display

If the order sheet doesn't display when you open the notice, please try the following.

- 1. Log out of Trax.
- 2. In your browser window, type the following: https://averaerx.com
  - a. Do not click on a link that autofill's.
  - b. Do not use a bookmark.

#### Unable to access the website

If you are unable to access the website, try he following steps.

- 1. Go to http://www2.anteil.com/Avel/
- 2. Enter State Abbreviation, Site name, and Last name.
- 3. Wait about 5 minutes.
- 4. Go to internet site: https://averaerx.com

#### Need help?

Email pharmacy@avelecare.com