Medication History Consent Feature

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Learn more about Improved Patient Demographics.

The medication history feature retrieves a patient's prescription history from Surescripts, providing up to 12 months of past medication data. This enables providers to access accurate prescription information without the need for manual entry. Once the medication history sync is complete, the provider can review and merge medications into the patient's chart. After merging, these medications become a permanent part of the patient's medication list.

This guide outlines how to access and manage the Medication History feature on both the Web and Mobile platforms. The feature displays medication history based on patient consent, helping providers maintain accurate and comprehensive medical records.

Web Application

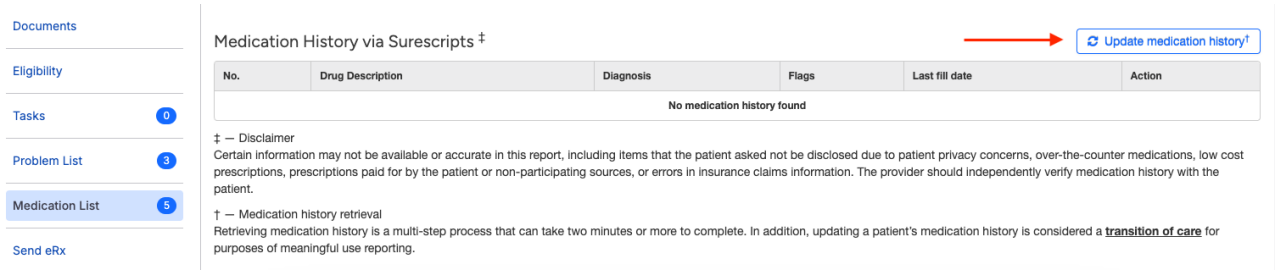
Accessing Medication History Consent

- Navigate to the Demographics section:
    - Go to the Demographics tab.
    - Scroll down to the Medical Management and Notes section.
    - Click Edit.
- Under Medication History > Consent, select one of the following options:
    - Yes – Patient has given consent to obtain medication history.
    - No – Patient has not given consent.
    - Unknown – Consent status is not known.

Consent selection determines whether medication history can be retrieved and displayed for this patient.

- From the Medication List, click the Update Medication History button.
- Scroll down to the Medication History via Surescripts section:
    - Retrieved prescriptions will appear in a table.
    - Click on a medication to view more details.
        - Medications can take up to 24 hours to populate, and the history includes only prescriptions available through Surescripts.
- Once the medication data has synced, you can choose to:
    - Merge the medications into the patient's active medication list.
    - Delete any medications you do not wish to include.

After merging, the medications become a permanent part of the patient's chart.



Mobile Application

Currently, the mobile app does not provide the option to edit or set the medication history consent. However, the consent data entered via the Web platform will carry over and be visible in the mobile interface as described below.

Viewing Medication History on Mobile

Option 1: Appointment Screen Access

1. From the Appointment screen, select the patient name.
2. In the menu dropdown, locate the Medications section under the Patient column.
3. Tap the three vertical dots (⋮) in the top-right corner.
4. Select Medication History.

Option 2: During Visit

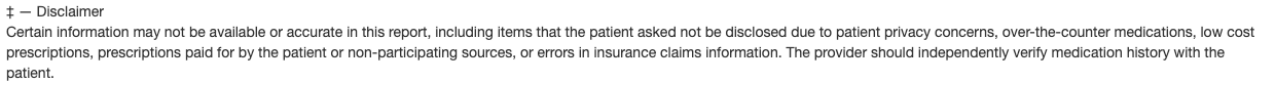
1. On the Appointment screen, tap Start Visit to begin the clinical note.
2. Open the menu (top left) and select either H&P or SOAP.
3. Navigate to the Medications & Allergies form.
4. Open the Medication History tab.

Disclaimers

Medication History via Surescripts (Web and Mobile)

Regardless of access method, the following disclaimer will appear with the Medication History Consent data:

"Certain information may not be available or accurate in this report, including items that the patient asked not be disclosed due to patient privacy concerns, over-the-counter medications, low-cost prescriptions, prescriptions paid for by the patient or non-participating sources, or errors in insurance claims information. The provider should independently verify medication history with the patient."



Medication History Retrieval (Web)

Before clicking the "Update Medication History" button, please ensure you have thoroughly reviewed the patient's current medication list.

"Retrieving medication history is a multi-step process that may take two minutes or longer to complete. Additionally, updating a patient's medication history is classified as a transition of care event for meaningful use reporting purposes."

† — Medication history retrieval
Retrieving medication history is a multi-step process that can take two minutes or more to complete. In addition, updating a patient's medication history is considered a **transition of care** for purposes of meaningful use reporting.