



excelleRX

Medication management innovator expedites fulfillment with Fortis

excelleRx, Inc. is a pioneer in the field of medication management for hospice and specialty disease markets, providing medication consultation and pharmaceutical distribution services. Combining proprietary technology and clinical experience, excelleRx ensures the appropriate use of medication, and thereby enhances quality of life. Caregivers from healthcare facilities nationwide rely on excelleRx to manage their patients' pharmacotherapy needs.

"excelleRx primarily provides comfort medications for patients who are in hospice care," explained Mark Robinson, senior business applications engineer at excelleRx. "We're trying to make end-of-life care manageable for these folks. We're also dealing with C-II narcotics that are highly regulated by the Drug Enforcement Administration (DEA). Our business is fast paced with no margin for error."

The organization takes a consultative approach that goes beyond the role of a traditional pharmacy. Each patient is carefully tracked via a comprehensive medication profile. Before the initial prescription is filled, an excelleRx pharmacist confers with the health care provider and recommends medications and pain management protocols with a proven track record. Then the pharmacist checks in to ensure that pain levels are decreasing as expected.

excelleRx receives most of their medical profile information and prescription requests by fax. Before implementing **Fortis** document management software, staff members, called runners, would take documents from the fax machines and bring them to the appropriate pharmacist or technician. Once the information was processed, the runners filed the information. Sometimes a health care provider phones in a prescription or medical profile information. Also, certain states do not allow C-II prescriptions to be sent by fax so these prescriptions come in via regular mail. Before the process was automated with **Fortis**, there could be delays while a staff member located the associated paperwork.

"We needed document management because we just didn't have any room to store this enormous amount of paper," said Robinson. "We also wanted to improve our tracking of prescriptions and decrease the turnaround time from when an initial request is received to approving, dispensing and shipping the medication."

Organization: excelleRx

Location: Philadelphia, PA

Partner: Keystone Digital Imaging

Return on Investment:

- Reduced turnaround time from prescription approval to dispensing from an average of four hours to two minutes
- Quicker retrieval of patient information
- Supplies more accurate and complete patient data
- Easier compliance with new DEA regulations
- Data security in accord with HIPAA compliance

Solution

excelleRx considered a number of document management software vendors and chose **Fortis**. "We work with Greg Bryan at Keystone Digital Imaging (KDI). The KDI team understands our business. We're not selling widgets or shoe polish. Our work affects people's lives," Robinson said. "We can't do any work on the system during business hours. It has to be done between 1 a.m. and 5 a.m. That's when KDI comes on site for upgrades."

excelleRx's prescription management team uses **Fortis** in conjunction with an Equisys fax server and Xeris®, proprietary software that augments and interprets a repository of demographic, disease state, prescription, and economic and clinical outcome data excelleRX collects. The faxes are automatically routed to the pharmacists and technicians. When an excelleRx pharmacist writes a prescription, it's assigned a reference number and added to the patient profile in Xeris. The prescription is not valid until it's signed by their physician and assigned a prescription number. A fax is automatically generated and sent to the physician for signature. The document is also stored in **Fortis** as a text file and an image file. excelleRx processes about 7,000 faxes per day. Prescriptions that are mailed in are scanned into Fortis.

Healthcare providers also phone in prescriptions. **Fortis** is used to accept the information, track it and match it up with right patient profile when the signed prescription comes in. "These prescriptions are coming in by mail or by fax. Often the physician will write the prescription on a fax cover sheet," Robinson said. "As long as the document contains seven elements required by law – it is valid. Because the called-in patient information is archived in **Fortis**, we can easily match up the prescription with the patient profile. If we were still using the paper system, we would have to go through all the files for a particular physician to find the information. Now we can do a fast query and find it," he said.

excelleRx pharmacists frequently use the annotation feature in **Fortis** if there are questions on a specific prescription or to bring attention to special instructions. "Without **Fortis** as part of our technology infrastructure, we wouldn't be able

to annotate the prescriptions," Robinson said. "We also wouldn't be able to search our files so efficiently. When a nurse calls in to say -- 'I sent this prescription to the physician for signature; did you get it back?' --we can search by the patient's name and find out immediately if that document is on file."

When the signed prescription comes back to excelleRx, the fax is automatically routed back to **Fortis** through **Fortis Imagent**. **Fortis Data Entry Assistant** reads the prescription number and automatically updates the index fields. With **Fortis**, excelleRx captures data more consistently. "When the data was entered manually, we intended to fill in fields such as name, date of birth, doctor's name, hospice name, social security number and doctor's fax number, but the data wasn't always entered completely." Robinson said. "Now that process is electronic. We have it all, so we can search for documents by any criteria we choose."

When the prescription is authorized, a notification is sent to Xeris through integration with the **Fortis** API. "An API trigger sends information to Xeris that says to mark this prescription as hard copy on file," Robinson said. "The pharmacist views the signed prescription through **Fortis Web**, and reviews and approves it. Then it's sent to our dispensing system." Using **Fortis** has reduced the turnaround time from when the signed prescription is received to when the medication is dispensed and shipped from an average of four hours to two minutes.

excelleRx also sends a Comfort Pack to new patients that includes Tylenol, compresses, bandages and other supplies. The distribution of the Comfort Packs has to be accounted for separately and is tracked by specific **Fortis** queries, In Baskets and drop down menus.

Fortis is used in the Pharmacy Affairs department and to archive Long-term Care documentation. The HR department is planning to use **Fortis** for archiving background checks, drug releases, certifications and tax information. excelleRx plans to implement **Fortis** in their finance and legal departments as well.



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