

Document Management

Electronically organize, attach and store documentation with PrimeCare®.

Document Management is an organization and storage tool that provides an easy way to manage and attach documents within our pharmacy management system to help manage the ever-increasing number of pharmacy documents. Documents can be entered into the system via fax, file upload, scan, or email attachment. All documents are encrypted when stored on the hard drive of the server, adding another layer of security and privacy.

Automate and Customize Faxable Forms

Document Management integrates with PrimeCare to create an easier, more efficient way to customize, use, and automatically populate information on forms. Easily create or upload forms, such as prescription or patient transfers, refill requests, and prior authorization requests. Forms can be auto-populated with information from 112 different fields, including patient, facility, prescriber, drug, prescription, ancillary, transaction, and clinical records.

Improve Compliance

Properly managing documents can protect against liability and create a record of services, allowing pharmacies to easily comply with regulations. Documents can be associated or linked with records in PrimeCare, such as drug, insurance, patient, prescriber, prescription, or transaction records. Files are stored and may be retrieved by using the documents icon.

Organize and Route Documents

Create your own queues for organizing documents. Assign specific users to each queue, and customize routing rules. Documents can be split into multiple queues if needed. The system can automatically forward documents associated with barcodes, fax IDs, and email addresses to the queues you designate. Users can annotate the documents with notes or create generic text stamps.

Improve Efficiency

Digitally organizes, routes, retrieves, and stores documents, freeing your staff from the tedious shuffle of paperwork.



- Integrates with our pharmacy management system
- Receives documents via scan, file upload, cloud fax, or standard email attachment
- Reduces costs, filling time, and paper-related waste
- Auto-populates custom-made forms
- Easily edit and annotate documents
- Customize queues and routing rules for efficient document processing and storage
- Provides three levels of user security settings: administrator, manager, and general
- Aids documentation compliance with HIPPA, Medicare, Medicaid, and other regulatory requirements



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Document Management Features

Forms

- Create forms for any purpose
- Improve communication with prescriber and patient
- Standardize tracking and communicate progression of therapy outcomes
- Document patient outcomes
- Script outcome questions for your staff
- Create forms with checkboxes, radio buttons, and drop-down lists
- Auto-populate forms with values from fields within PrimeCare, including patient, prescriber, patient insurance, drug, prescription, ancillary, transaction, and clinical records

Receive Documents

- Scan
- File upload
- Cloud fax
- Standard email attachment

Associate Documents

- Associate documents with records within PrimeCare for easy retrieval and improved compliance
- Link documents to Patient, Prescriber, Drug, Patient Insurance, Prescription, or Transaction records
- Group patient vaccine information with a patient chart record

Annotation

- Stamps
- Images
- Notations
- Track changes
- User-specific colors

Queues

- Set up, edit, or delete any queue
- Set default queue for inbound documents
- Edit the names of queues and assign them to specific users
- View all queues and the number of documents and users associated with each
- Assign or remove users from specific queues

