EPIC TRAINING

Managing Work Queues
Quick Start Guide

HOUSTON
Methodist
LEADING MEDICINE
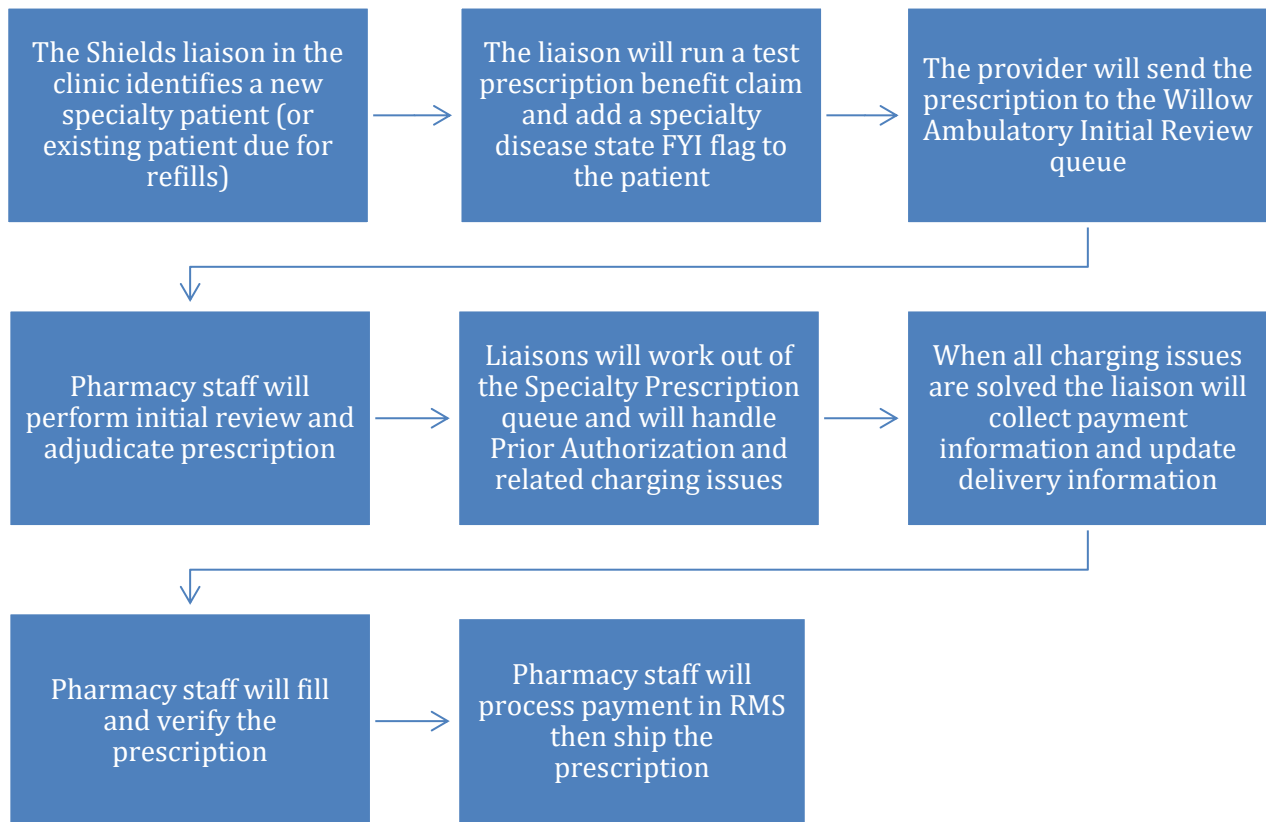
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Overview of the fill process

When a physician from your organization orders a med in Epic and selects your pharmacy for the patient, the prescription automatically appears in a work queue. During the filling process, the prescription moves through various work queues. Here's a diagram of the filling process:

```
┌─────────────────────┐      ┌─────────────────────┐      ┌─────────────────────┐
│ The Shields liaison │      │ The liaison will run│      │ The provider will   │
│ in the clinic       │ ───► │ a test prescription │ ───► │ send the            │
│ identifies a new    │      │ benefit claim and   │      │ prescription to the │
│ specialty patient   │      │ add a specialty     │      │ Willow Ambulatory   │
│ (or existing patient│      │ disease state FYI   │      │ Initial Review      │
│ due for refills)    │      │ flag to the patient │      │ queue               │
└─────────────────────┘      └─────────────────────┘      └─────────────────────┘
                                                                      │
           ┌──────────────────────────────────────────────────────────┘
           ▼
┌─────────────────────┐      ┌─────────────────────┐      ┌─────────────────────┐
│ Pharmacy staff will │      │ Liaisons will work  │      │ When all charging   │
│ perform initial     │ ───► │ out of the Specialty│ ───► │ issues are solved   │
│ review and          │      │ Prescription queue  │      │ the liaison will    │
│ adjudicate          │      │ and will handle     │      │ collect payment     │
│ prescription        │      │ Prior Authorization │      │ information and     │
│                     │      │ and related charging│      │ update delivery     │
│                     │      │ issues              │      │ information         │
└─────────────────────┘      └─────────────────────┘      └─────────────────────┘
                                                                      │
           ┌──────────────────────────────────────────────────────────┘
           ▼
┌─────────────────────┐      ┌─────────────────────┐
│ Pharmacy staff will │      │ Pharmacy staff will │
│ fill and verify the │ ───► │ process payment in  │
│ prescription        │      │ RMS then ship the   │
│                     │      │ prescription        │
└─────────────────────┘      └─────────────────────┘
```

Understand the standard work queues

You can access fifteen standard work queues, which are lists of patients grouped by common tasks, from the Willow Ambulatory homepage by clicking their names.

> (i) To navigate back to the homepage after you've opened an activity, select the ⌂ tab at the top left of the screen.

Standard Work queue descriptions

- **Waiting Patients:** Patients physically waiting in the pharmacy for their prescriptions. Clicking on this queue opens the Waiting Patients list in Front Counter.

- **Specialty Patients:** All specialty patients should fall into this queue. The Shields liaisons will be working out of this queue.

- **All Pharmacist Work:** Prescriptions that require a pharmacist to take the next action on them.

- **Clinical Review:** Prescriptions that have had first fill review but need to be reviewed by a pharmacist.

- **Ready to Verify:** Filled prescriptions that need to be verified by a pharmacist.

- **Initial Review:** Prescriptions entered in Hyperspace (in the clinic or hospital), reorders approved through Surescripts that need to be reviewed before filling, and certain refills requested by patients directly from MyChart or an IVR.

- **Ready to Fill:** Prescriptions that have had clinical review or refill review and are ready to be filled. Technicians manually print fill labels from this queue.

- **DUR Reject:** Prescriptions with drug utilization review (DUR) errors.

- **Charging:** Prescriptions with problems related to adjudication.

- **Refill Too Soon and PA Required:** Prescriptions that either are being refilled too soon or require prior authorization.

- **Pending Refill Approval:** Prescriptions that have outstanding refill authorization requests.

- **Waiting for Stock:** Prescriptions for which there is either insufficient inventory or a completion fill hold.

- **Everything:** Any prescription in the process of being filled, as well as any prescriptions with refills requested and no refills remaining.

- **Everything for Me:** Any prescription included in the Everything queue that you have the ability to act on in the system.
- **Will Call:** Verified prescriptions ready to be sold in person.

> ⓘ To create your own version of the homepage, drag and drop anything from a singular work queue to an entire section in the sidebar to reorder it. If you want to restore the default order, click ≣ and select **Restore default order**.

> ⓘ Click the ✖ in the top right of the work queue you're looking at to close it. You remain on the homepage, but only the sidebar appears.

> ❗ The standard work queues that appear on the homepage can vary depending on the user. The work queues that you see aren't necessarily the work queues that a technician sees.

Create a list of your tasks

Create your own work queue to focus on the prescriptions that need your attention. For example, create a work queue to see only prescriptions that need first fill or charging review.

1. In the work queue sidebar, right-click and select **Add work queue**.
2. Name your work queue.
3. Select the refresh interval for your work queue. The default interval is 1 minute, and the minimum interval is 15 seconds.
4. Clear the check boxes for any of the following types of things you want to exclude:
   - Sources
   - DEA classifications
   - Work request types
   - Flags
   - Prescription sales
   - E-Prescription errors
5. Enter any other information on which you want the work queue to filter.
6. Click **Accept**. Your view now appears as an option under the **My Work Queues** header in the work queue sidebar.

Select the **Include as a favorite on the homepage** check box in the General Configuration section to mark a work queue as your favorite. When you return to the homepage, that work queue appears as under the **Favorites** header in the work queue sidebar.

Click the **Copy Settings** button at the top of the window to copy work queue configurations from either other users or the system. If you want to narrow down available configurations to a certain user, enter that user's name in the **Filter by user** field in the Copy Settings window that appears.

Work queue filtering involves the use of both AND logic and OR logic. The system uses AND logic to filter between the individual sections in the Work Queue Configuration window, while OR logic is used to filter the options in each section. For example, consider a scenario where you have the following options selected in the Work Queue Configuration window:
- In the Overall Criteria section
  - Pharmacy
  - Call Center
- In the Work Requests section
  - Work requests pending prescription entry
  - Prescriptions ready to fill

For a fill to appear in the resulting queue, it would need to both have one of the specified sources and be in a work request at one of the specified statuses.

However, the AND logic doesn't apply among the following three sections, at least one of which is required:
- Work Requests
- Flags
- External E-Prescription Errors

If there are options selected under more than one of these sections, the system uses OR logic among the selected sections.

Act on your custom work queue from the sidebar

If you want to modify your custom work queue in some way, you can do so directly from the sidebar.

1. In the work queue sidebar, right-click your work queue's name.
2. Select the action you want to take:
   - **Add to favorites**
     - Includes your work queue as a "favorite" and is quicker than re-opening the Work Queue Configuration window to select this.
     - This action is also available from the right-click menu for standard work queues
   - **Open by default on login**
     - Opens your work queue on the homepage when you log in.
     - This action is also available from the right-click menu for standard work queues.
   - **Save copy as**
     - Creates a copy of your work queue that you can edit and rename.
     - This action is also available from the right-click menu for standard work queues.
   - **Edit**
     - Opens the Work Queue Configuration window.
     - This action is available only for custom work queues.
   - **Delete**
     - Deletes your work queue.
     - This action is available only for custom work queues.