

eRx Configuration - Customer

Overview

This document is a step-by-step guide to complete the eRx configuration within your Welkin environment. The following needs be configured:

[Step 1: Configuring Designer Portal](#)

[Step 2: Configuring Admin Portal](#)

After the above configuration is complete, please provide the following details to your Welkin implementation manager to enable the eRx Integration in Welkin for your practice:

1. Tenant name
2. Environment name
3. API Client ID and Secret
4. Welkin user ID and Dr First user ID of users registered with Dr First (Welkin user ID can be found in **Users** section of [Welkin's Admin Portal](#))
5. Dr First SSO Credentials
 - a. rcopia_portal_system_name
 - b. rcopia_practice_user_name
 - c. secret_key
6. Dr First API Credentials
 - a. vendor_name
 - b. vendor_password
 - c. practice_user_name

Designer Configuration

1. Login to [Welkin's Designer Portal](#)
2. Select the environment for which you want to configure eRx Integration.
3. Click on the **Create Draft** button in the upper right corner to go into *Edit mode*.
4. Once the following 4 configurations are done, go to **Change Summary** in the left panel and click **Publish** to push the changes.

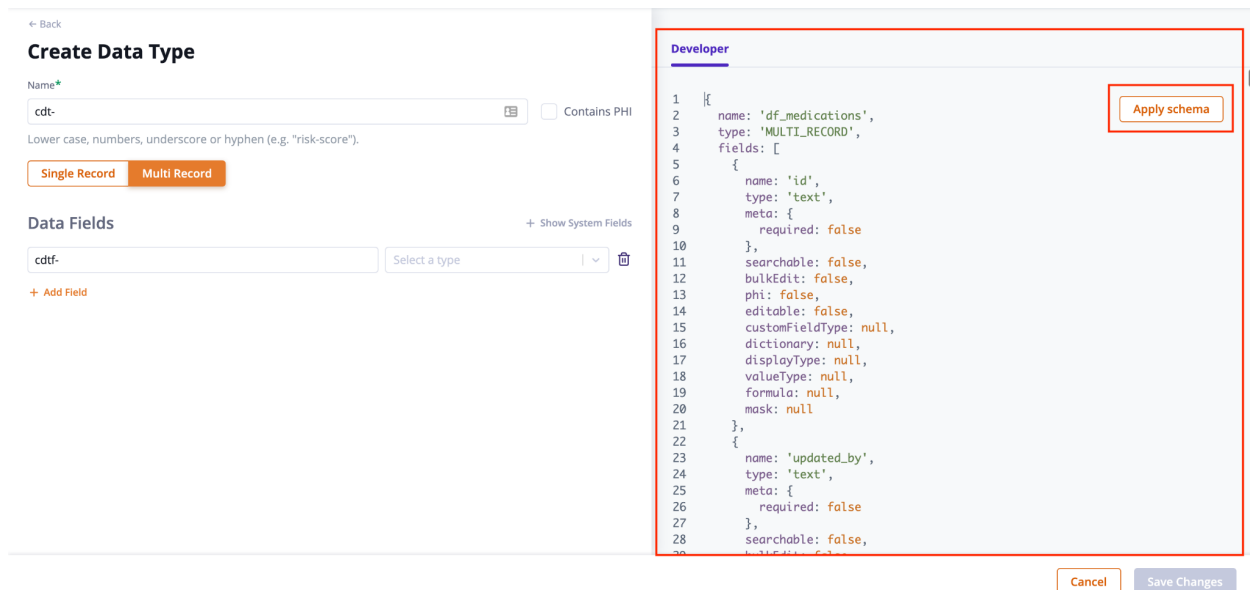
1. Adding Data Types

3 data types are used by the eRx Integration:

1. Allergies
2. Medications
3. Problems

To add these in your environment, please follow these steps for each data type:

1. Go to **Custom Data > Data Types** in the left panel
2. Click on **Create Data Type**
3. In the right panel, under **Developer** heading, paste the relevant JSON ([Allergies JSON](#) | [Medications JSON](#) | [Problems JSON](#))
4. **Do not change the CDT name or field names.**
5. Click on the **Apply Schema** button
6. Click **Save Changes**



Screenshot 1: Creating Data Types

2. Defining Data Views

Once the data types are created for Allergies, Medications and Problems, you need to define Data Views that will allow the user to view data in the Care portal once actual data from Dr First starts populating. Create 3 data views, one for each data type by following these steps:

1. Go to **Visual Components > Data View** in the left panel

2. Click on **Create Data View**
3. Under **General Information** tab, give the Data View a `Name` (allergies / medications / problem-list)
4. Select the appropriate `Data Type` that you want to show for a particular view (df_allergies / df_medications / df_diagnoses_problems)
5. Make sure that the **Enable Add** and **Enable Edit** fields are unchecked.

[← Back](#)

Create Data View

General Information

Add Form

Edit Form

View Form

Filters

Sort

Bulk Edit

Enable Add Enable Edit

Name*

allergies

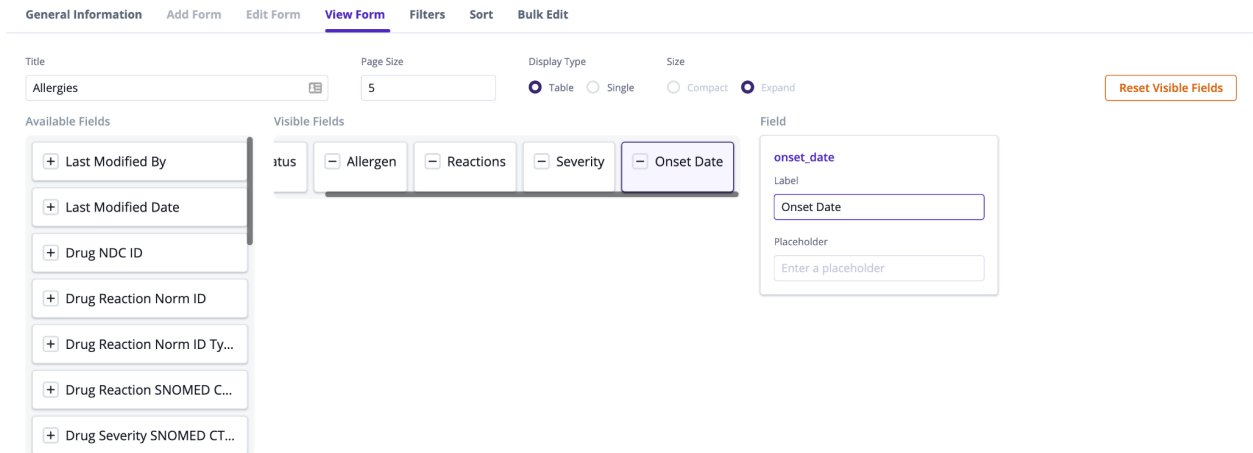
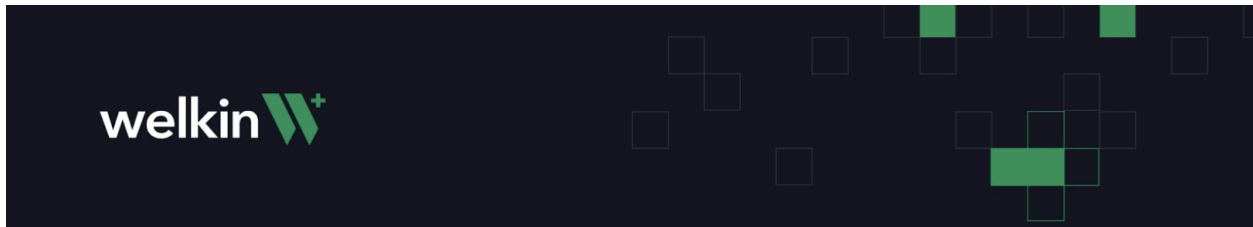
Lower case, numbers, underscore or hyphen (e.g. "risk-score").

Data Type*

df_allergies

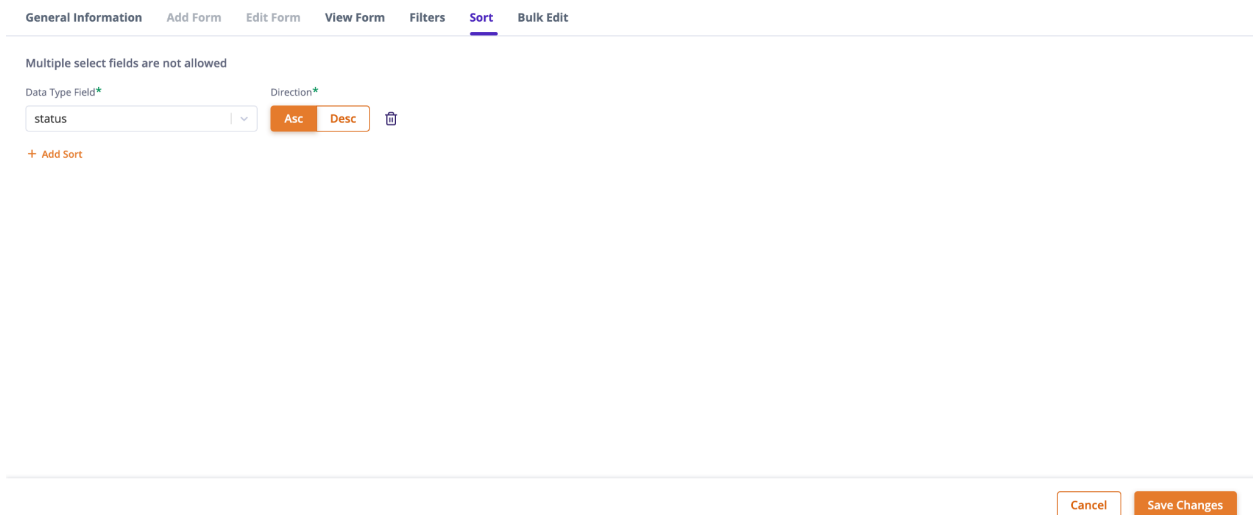
Screenshot 2: Creating Data View (1/3)

6. Under the **View Form** tab, set the Title field. This value will display as the Data View heading in Care portal
7. From the list of **Available Fields**, select the fields that you want to display in the Data View. A recommendation here is to ignore the *default system fields* and not to add them to the Visible Fields section. These fields are at the bottom of the **Available Fields** section (like id, created_by, created_at etc.)
8. Here you can set Labels for fields. For example - for a field named *onset_date*, you can set the label as *Onset Date* and it would display the label value on the UI rather than the default field name.



Screenshot 3: Creating Data View (2/3)

9. Under the **Sort** tab, click on the **Add Sort** button.



Screenshot 4: Creating Data View (3/3)

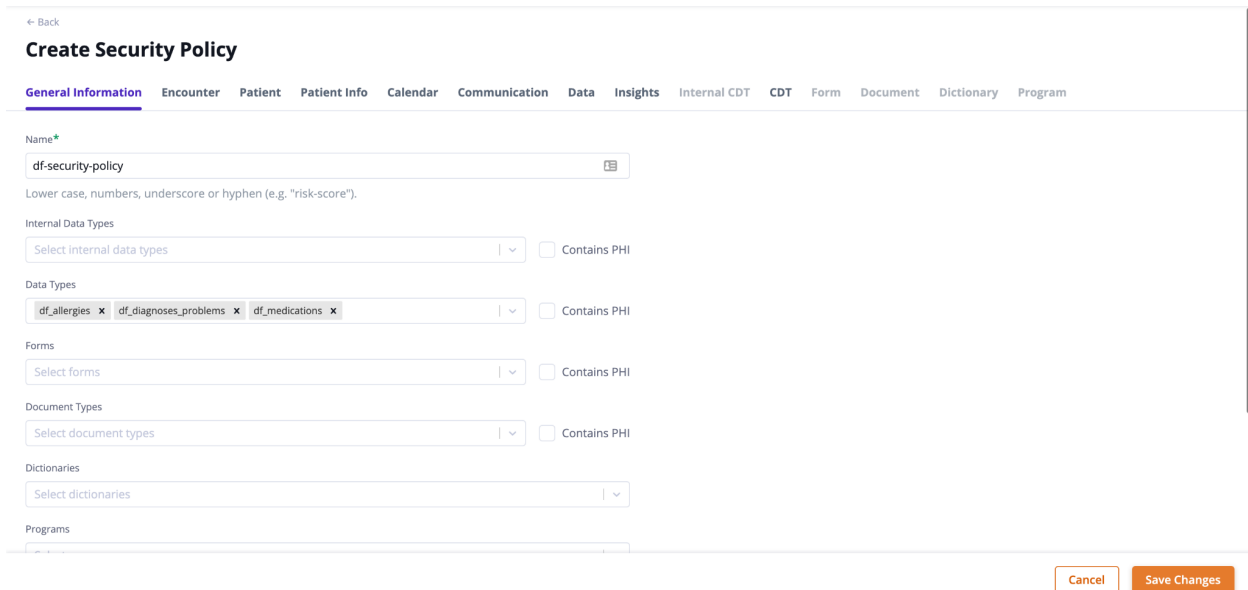
10. In the `Data Type Field`, select the `status` field. Keep the `Direction` as `Asc`.

11. Click on the **Save Changes** button.

3. Adding Security Policy

1. Go to **Access Control > Security Policies** in the left panel
2. Click on **Create Security Policy**
3. Under **General Information** tab:
 - a. Give a name to the security policy

- b. Under Data Types, select `df_allergies`, `df_medications` and `df_diagnoses_problems`
 - c. Check the Select All boxes under Patient and CDT tabs.
4. Click on **Save Changes**



← Back

Create Security Policy

General Information Encounter Patient Patient Info Calendar Communication Data Insights Internal CDT CDT Form Document Dictionary Program

Name*
df-security-policy

Lower case, numbers, underscore or hyphen (e.g. "risk-score").

Internal Data Types
Select internal data types | Contains PHI

Data Types
df_allergies x df_diagnoses_problems x df_medications x | Contains PHI

Forms
Select forms | Contains PHI

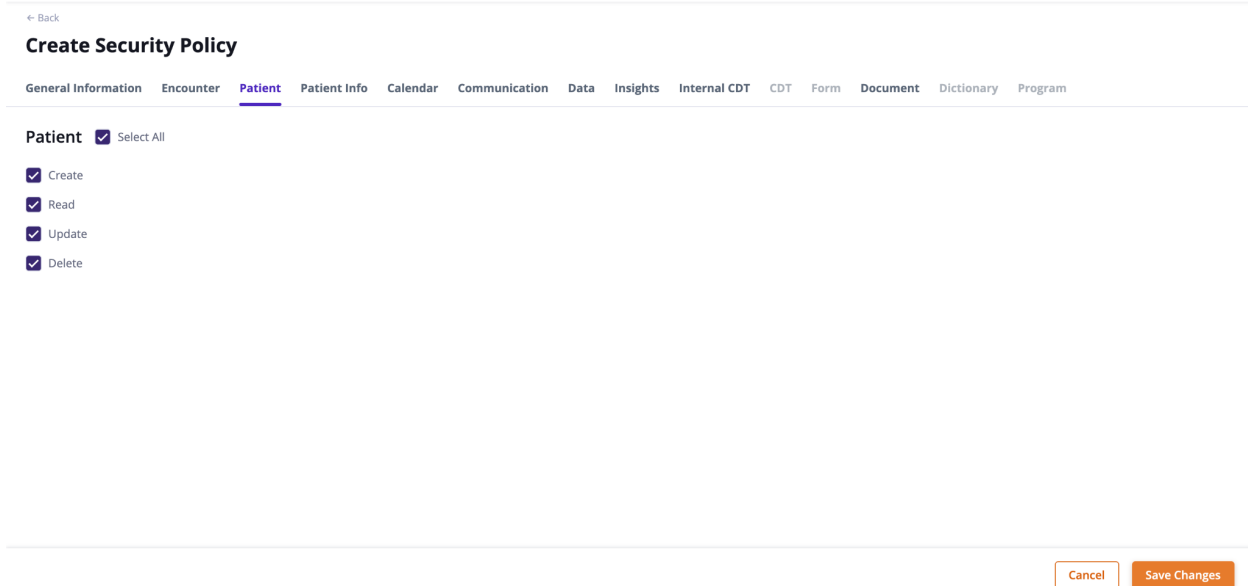
Document Types
Select document types | Contains PHI

Dictionaries
Select dictionaries |

Programs

Cancel Save Changes

Screenshot 5: Creating Security Policy (1/5)



← Back

Create Security Policy

General Information Encounter Patient Patient Info Calendar Communication Data Insights Internal CDT CDT Form Document Dictionary Program

Patient Select All

- Create
- Read
- Update
- Delete

Cancel Save Changes

Screenshot 6: Creating Security Policy (2/5)

← Back

Create Security Policy

General Information Encounter Patient Patient Info Calendar Communication Data Insights Internal CDT **CDT** Form Document Dictionary Program

Data Types Select All

df_allergies

+ Show System Fields

Field Name	<input checked="" type="checkbox"/> Create	<input checked="" type="checkbox"/> Read	<input checked="" type="checkbox"/> Read Masked	<input checked="" type="checkbox"/> Update	<input checked="" type="checkbox"/> Delete
allergen	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
reactions	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
severity	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
onset_date	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
last_modified_by	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
status	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
last_modified_date	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Cancel

Screenshot 7: Creating Security Policy (3/5)

df_diagnoses_problems

+ Show System Fields

Field Name	<input checked="" type="checkbox"/> Create	<input checked="" type="checkbox"/> Read	<input checked="" type="checkbox"/> Read Masked	<input checked="" type="checkbox"/> Update	<input checked="" type="checkbox"/> Delete
diagnosis_coding_system	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
code	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
description	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
onset_date	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
last_modified_by	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
last_modified_date	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
status	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

df_medications

+ Show System Fields

Field Name	<input checked="" type="checkbox"/> Create	<input checked="" type="checkbox"/> Read	<input checked="" type="checkbox"/> Read Masked	<input checked="" type="checkbox"/> Update	<input checked="" type="checkbox"/> Delete
------------	--	--	---	--	--

Cancel

Save Changes

Screenshot 8: Creating Security Policy (4/5)

df_medications

+ Show System Fields

Field Name	<input checked="" type="checkbox"/> Create	<input checked="" type="checkbox"/> Read	<input checked="" type="checkbox"/> Read Masked	<input checked="" type="checkbox"/> Update	<input checked="" type="checkbox"/> Delete
start_date	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
stop_date	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
medication	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
status	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
last_modified_date	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
last_modified_by	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
strength	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
strength_unit	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>



Screenshot 9: Creating Security Policy (5/5)

5. Go to **Access Control > Roles** in the left panel
6. Create a new role for the user group that will be using the eRx Integration. If such a role is already defined and pre-exists, then open it.
7. Under **Policies**, select the security policy created in steps 1-4.
8. Click on **Save Changes**

← Back

Create Role

Name*

Lower case, numbers, underscore or hyphen (e.g. "risk-score").

Policies*

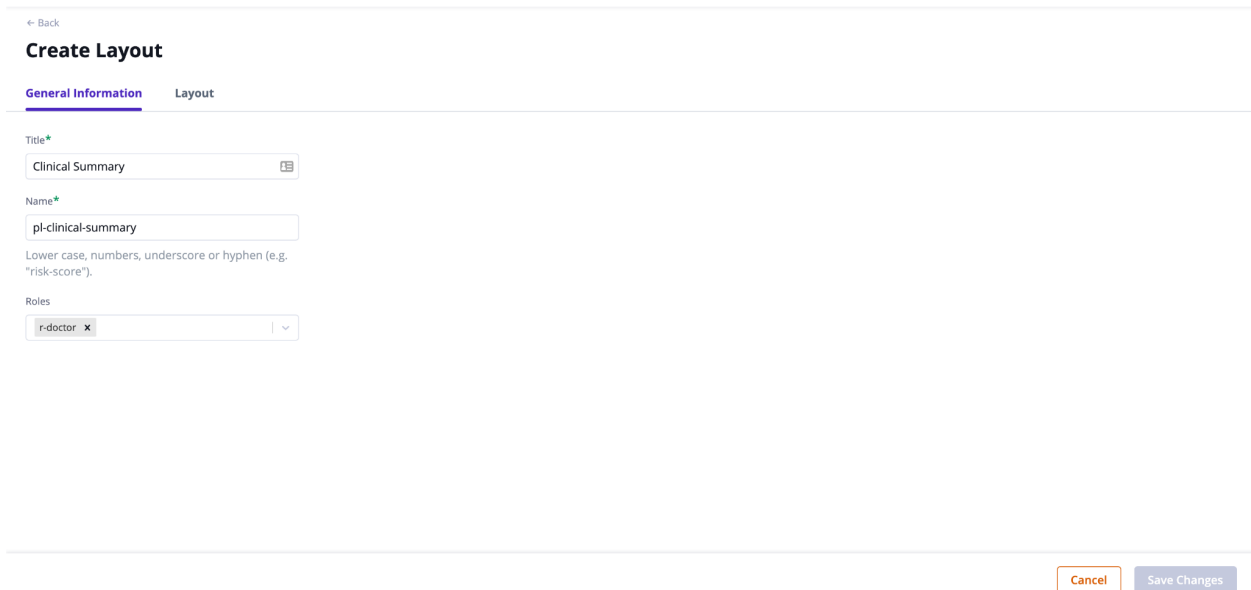
 Contains PHI

Description

Screenshot 10: Setting security policy in the role

4. Adding Layout

1. Go to **Presentation > Layouts**
2. Click on **Create Layout**
3. Under the **General Information** tab, give the layout a name (like 'Clinical Summary'). This name will be displayed on the Care Portal.
4. In the **Roles** field, set the role that was created in the [previous section](#).



← Back

Create Layout

General Information Layout

Title*

Clinical Summary

Name*

pl-clinical-summary

Lower case, numbers, underscore or hyphen (e.g. "risk-score").

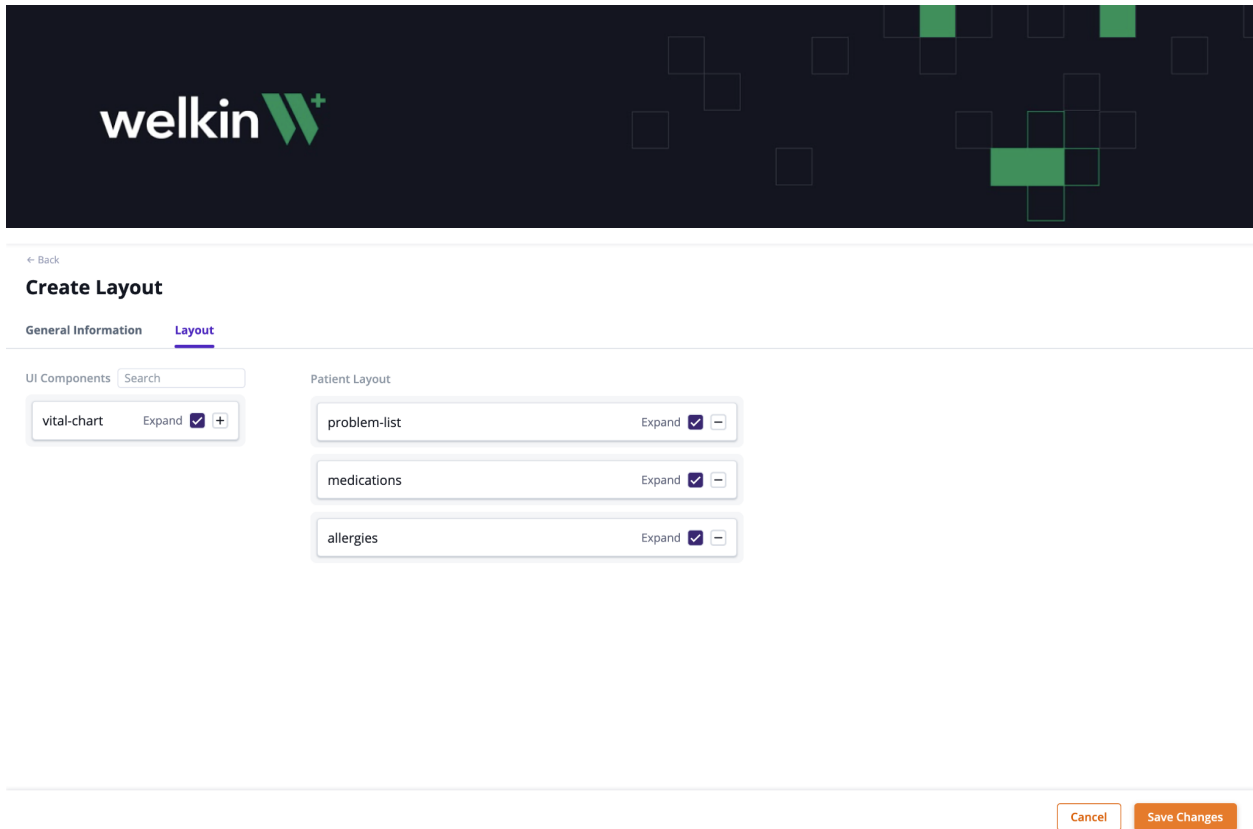
Roles

r-doctor

Cancel Save Changes

Screenshot 11: Creating Layout (1/2)

5. Under the **Layout** tab, select the Data Views for Allergies, Medications and Problems.
6. Click on **Save Changes**



Screenshot 12: Creating Layout (2/2)

5. Adding Access Point

1. Go to **Presentation > Action Bar**
2. Add the “ePrescription” action button to the **Visible Action Buttons** section.
3. Click on **Save Changes**

Screenshot 13: Adding Access Point to Patient Profile

Admin Configuration

1. Creating API Client

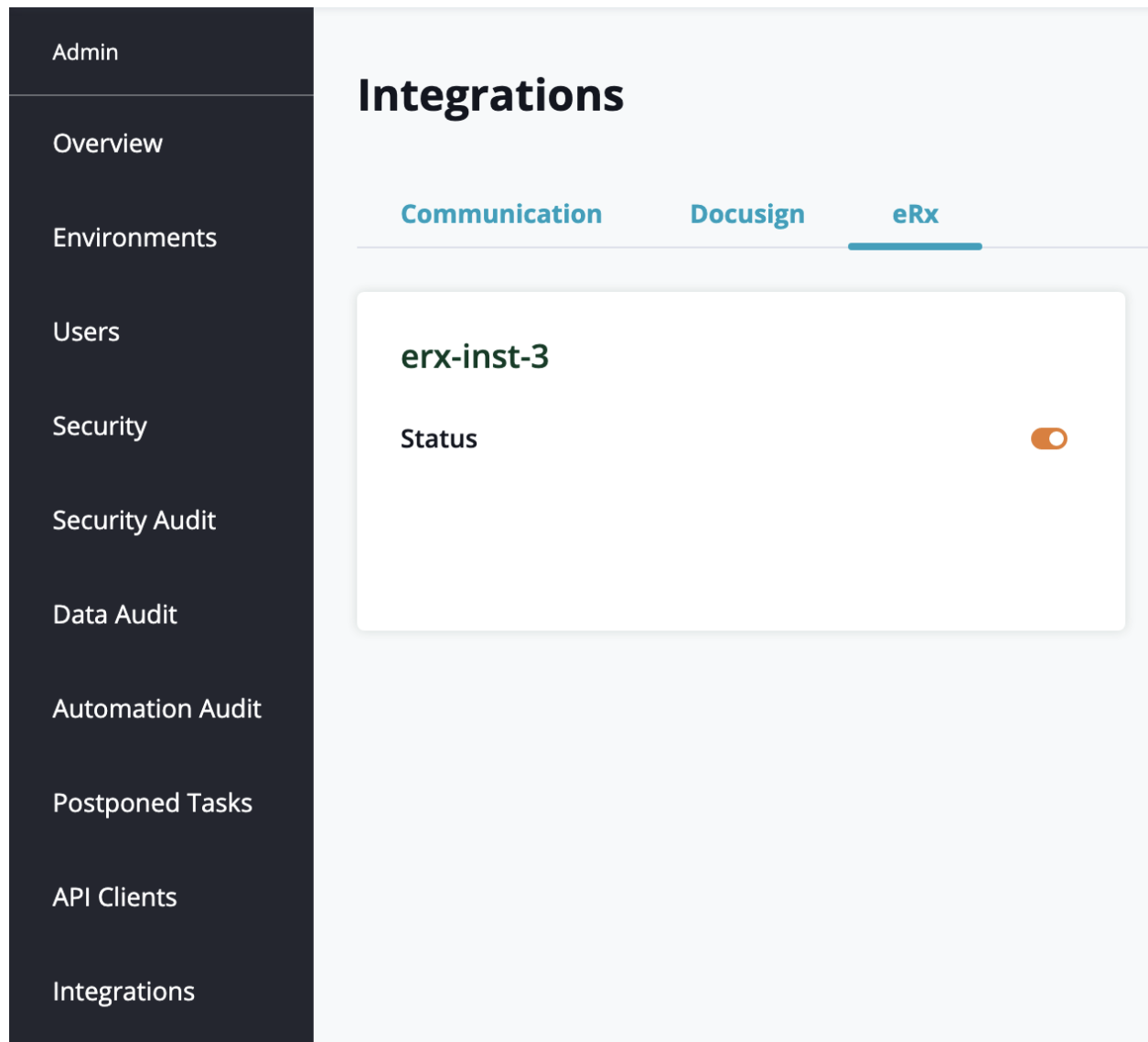
1. Login to [Welkin's Admin Portal](#)
2. Go to **API Clients** in the left panel
3. Click on **Create Client** to create API client and save the credentials
4. Open the new API client, scroll to the bottom
5. Select the appropriate environment and click the **Submit** button.
6. Click on the edit icon in the right in the same environment:
 - a. Fill the `Role`, `Primary Role` and `Policies` fields as created in Designer

- b. Select all the **Regions** and **Territories** as applicable
- 7. Click **Save** button

2. Enabling Notification Count Widget

To see the count of pending pharmacy messages and prescriptions, you must enable eRx from the Admin portal. This step needs to be performed after the Welkin Engineering team has configured eRx for your practice, before which the enable button will be disabled.

1. Go to **Integrations > eRx**
2. Enable eRx for the same environment for which we configured it in Designer.



The screenshot shows the Welkin Admin portal interface. On the left is a dark sidebar with a menu containing: Admin, Overview, Environments, Users, Security, Security Audit, Data Audit, Automation Audit, Postponed Tasks, API Clients, and Integrations. The main content area is titled "Integrations" and has three tabs: "Communication", "DocuSign", and "eRx". The "eRx" tab is selected and underlined. Below the tabs, there is a white card with the title "erx-inst-3". Inside the card, the "Status" is shown as an orange toggle switch that is currently turned on.

Screenshot 14: Enabling Notification Count Widget

Data Type JSONs

Allergies

```
{  
  name: 'df_allergies',  
  type: 'MULTI_RECORD',  
  fields: [  
    {  
      name: 'id',  
      type: 'text',  
      meta: {  
        required: false  
      },  
      searchable: false,  
      bulkEdit: false,  
      phi: false,  
      editable: false,  
      customFieldType: null,  
      dictionary: null,  
      displayType: null,  
      valueType: null,  
      formula: null,  
      mask: null  
    },  
    {  
      name: 'updated_by',  
      type: 'text',  
      meta: {  
        required: false  
      }  
    }  
  ]  
}
```

```
    },  
    searchable: false,  
    bulkEdit: false,  
    phi: false,  
    editable: false,  
    customFieldType: null,  
    dictionary: null,  
    displayType: null,  
    valueType: null,  
    formula: null,  
    mask: null  
  },  
  {  
    name: 'updated_by_name',  
    type: 'text',  
    meta: {  
      required: false  
    },  
    searchable: false,  
    bulkEdit: false,  
    phi: false,  
    editable: false,  
    customFieldType: null,  
    dictionary: null,  
    displayType: null,  
    valueType: null,  
    formula: null,  
    mask: null  
  },  
}
```

```
{
  name: 'updated_at',
  type: 'datetime',
  meta: {
    required: false
  },
  searchable: false,
  bulkEdit: false,
  phi: false,
  editable: false,
  customFieldType: null,
  dictionary: null,
  displayType: null,
  valueType: null,
  formula: null,
  mask: null
},
{
  name: 'created_by',
  type: 'text',
  meta: {
    required: false
  },
  searchable: false,
  bulkEdit: false,
  phi: false,
  editable: false,
  customFieldType: null,
  dictionary: null,
```

```
    displayType: null,  
    valueType: null,  
    formula: null,  
    mask: null  
  },  
  {  
    name: 'created_by_name',  
    type: 'text',  
    meta: {  
      required: false  
    },  
    searchable: false,  
    bulkEdit: false,  
    phi: false,  
    editable: false,  
    customFieldType: null,  
    dictionary: null,  
    displayType: null,  
    valueType: null,  
    formula: null,  
    mask: null  
  },  
  {  
    name: 'created_at',  
    type: 'datetime',  
    meta: {  
      required: false  
    },  
    searchable: false,
```

```
    bulkEdit: false,  
    phi: false,  
    editable: false,  
    customFieldType: null,  
    dictionary: null,  
    displayType: null,  
    valueType: null,  
    formula: null,  
    mask: null  
  },  
  {  
    name: 'source_name',  
    type: 'text',  
    meta: {  
      required: false  
    },  
    searchable: false,  
    bulkEdit: false,  
    phi: false,  
    editable: false,  
    customFieldType: null,  
    dictionary: null,  
    displayType: null,  
    valueType: null,  
    formula: null,  
    mask: null  
  },  
  {  
    name: 'source_id',
```

```
    type: 'text',
    meta: {
      required: false
    },
    searchable: false,
    bulkEdit: false,
    phi: false,
    editable: false,
    customFieldType: null,
    dictionary: null,
    displayType: null,
    valueType: null,
    formula: null,
    mask: null
  },
  {
    name: 'source_type',
    type: 'text',
    meta: {
      required: false
    },
    searchable: false,
    bulkEdit: false,
    phi: false,
    editable: false,
    customFieldType: null,
    dictionary: null,
    displayType: null,
    valueType: null,
```



```
    formula: null,  
    mask: null  
  },  
  {  
    name: 'external_id',  
    type: 'text',  
    meta: {  
      required: false  
    },  
    searchable: false,  
    bulkEdit: false,  
    phi: false,  
    editable: false,  
    customFieldType: null,  
    dictionary: null,  
    displayType: null,  
    valueType: null,  
    formula: null,  
    mask: null  
  },  
  {  
    name: 'external_guid',  
    type: 'text',  
    meta: {  
      required: false  
    },  
    searchable: false,  
    bulkEdit: false,  
    phi: false,
```

```
    editable: false,  
    customFieldType: null,  
    dictionary: null,  
    displayType: null,  
    valueType: null,  
    formula: null,  
    mask: null  
  },  
  {  
    name: 'allergen',  
    type: 'text',  
    meta: {  
      required: true  
    },  
    searchable: false,  
    bulkEdit: false,  
    phi: false,  
    editable: true,  
    customFieldType: null,  
    dictionary: null,  
    displayType: null,  
    valueType: null,  
    formula: null,  
    mask: null  
  },  
  {  
    name: 'reactions',  
    type: 'text',  
    meta: {
```

```
      required: false
    },
    searchable: false,
    bulkEdit: false,
    phi: false,
    editable: true,
    customFieldType: null,
    dictionary: null,
    displayType: null,
    valueType: null,
    formula: null,
    mask: null
  },
  {
    name: 'severity',
    type: 'text',
    meta: {
      required: false
    },
    searchable: false,
    bulkEdit: false,
    phi: false,
    editable: true,
    customFieldType: null,
    dictionary: null,
    displayType: null,
    valueType: null,
    formula: null,
    mask: null
```

```
},  
{  
  name: 'onset_date',  
  type: 'date',  
  meta: {  
    required: false  
  },  
  searchable: false,  
  bulkEdit: false,  
  phi: false,  
  editable: true,  
  customFieldType: null,  
  dictionary: null,  
  displayType: null,  
  valueType: null,  
  formula: null,  
  mask: null  
},  
{  
  name: 'last_modified_by',  
  type: 'text',  
  meta: {  
    required: false  
  },  
  searchable: false,  
  bulkEdit: false,  
  phi: false,  
  editable: true,  
  customFieldType: null,
```

```
dictionary: null,  
displayType: null,  
valueType: null,  
formula: null,  
mask: null  
},  
{  
  name: 'status',  
  type: 'select',  
  meta: {  
    required: true,  
    options: [  
      {  
        label: 'Active',  
        value: 'b_active'  
      },  
      {  
        label: 'Inactive',  
        value: 'c_inactive'  
      },  
      {  
        label: 'Deleted',  
        value: 'd_deleted'  
      }  
    ]  
  },  
  searchable: true,  
  bulkEdit: false,  
  phi: false,
```

```
    editable: true,  
    customFieldType: null,  
    dictionary: null,  
    displayType: 'SELECT',  
    valueType: 'STRING',  
    formula: null,  
    mask: null  
  },  
  {  
    name: 'last_modified_date',  
    type: 'text',  
    meta: {  
      required: false  
    },  
    searchable: false,  
    bulkEdit: false,  
    phi: false,  
    editable: true,  
    customFieldType: null,  
    dictionary: null,  
    displayType: null,  
    valueType: null,  
    formula: null,  
    mask: null  
  },  
  {  
    name: 'drug_ndc_id',  
    type: 'text',  
    meta: {
```

```
      required: false
    },
    searchable: false,
    bulkEdit: false,
    phi: false,
    editable: true,
    customFieldType: null,
    dictionary: null,
    displayType: null,
    valueType: null,
    formula: null,
    mask: null
  },
  {
    name: 'drug_rx_norm_id',
    type: 'text',
    meta: {
      required: false
    },
    searchable: false,
    bulkEdit: false,
    phi: false,
    editable: true,
    customFieldType: null,
    dictionary: null,
    displayType: null,
    valueType: null,
    formula: null,
    mask: null
```

```
  },  
  {  
    name: 'drug_rx_norm_id_type',  
    type: 'text',  
    meta: {  
      required: false  
    },  
    searchable: false,  
    bulkEdit: false,  
    phi: false,  
    editable: true,  
    customFieldType: null,  
    dictionary: null,  
    displayType: null,  
    valueType: null,  
    formula: null,  
    mask: null  
  },  
  {  
    name: 'drug_reaction_snomed_ct_concept_id',  
    type: 'text',  
    meta: {  
      required: false  
    },  
    searchable: false,  
    bulkEdit: false,  
    phi: false,  
    editable: true,  
    customFieldType: null,
```



```
dictionary: null,  
displayType: null,  
valueType: null,  
formula: null,  
mask: null  
},  
{  
  name: 'drug_severity_snomed_ct_concept_id',  
  type: 'text',  
  meta: {  
    required: false  
  },  
  searchable: false,  
  bulkEdit: false,  
  phi: false,  
  editable: true,  
  customFieldType: null,  
  dictionary: null,  
  displayType: null,  
  valueType: null,  
  formula: null,  
  mask: null  
},  
{  
  name: 'allergen_group',  
  type: 'text',  
  meta: {  
    required: false  
  },  
}
```

```
    searchable: false,  
    bulkEdit: false,  
    phi: false,  
    editable: true,  
    customFieldType: null,  
    dictionary: null,  
    displayType: null,  
    valueType: null,  
    formula: null,  
    mask: null  
  }  
]  
}
```

Medications

```
{  
  name: 'df_medications',  
  type: 'MULTI_RECORD',  
  fields: [  
    {  
      name: 'id',  
      type: 'text',  
      meta: {  
        required: false  
      },  
      searchable: false,  
      bulkEdit: false,  
      phi: false,  
      editable: false,  
    },  
  ],  
}
```

```
    customFieldType: null,  
    dictionary: null,  
    displayType: null,  
    valueType: null,  
    formula: null,  
    mask: null  
  },  
  {  
    name: 'updated_by',  
    type: 'text',  
    meta: {  
      required: false  
    },  
    searchable: false,  
    bulkEdit: false,  
    phi: false,  
    editable: false,  
    customFieldType: null,  
    dictionary: null,  
    displayType: null,  
    valueType: null,  
    formula: null,  
    mask: null  
  },  
  {  
    name: 'updated_by_name',  
    type: 'text',  
    meta: {  
      required: false
```

```
    },  
    searchable: false,  
    bulkEdit: false,  
    phi: false,  
    editable: false,  
    customFieldType: null,  
    dictionary: null,  
    displayType: null,  
    valueType: null,  
    formula: null,  
    mask: null  
  },  
  {  
    name: 'updated_at',  
    type: 'datetime',  
    meta: {  
      required: false  
    },  
    searchable: false,  
    bulkEdit: false,  
    phi: false,  
    editable: false,  
    customFieldType: null,  
    dictionary: null,  
    displayType: null,  
    valueType: null,  
    formula: null,  
    mask: null  
  },  
}
```

```
{
  name: 'created_by',
  type: 'text',
  meta: {
    required: false
  },
  searchable: false,
  bulkEdit: false,
  phi: false,
  editable: false,
  customFieldType: null,
  dictionary: null,
  displayType: null,
  valueType: null,
  formula: null,
  mask: null
},
{
  name: 'created_by_name',
  type: 'text',
  meta: {
    required: false
  },
  searchable: false,
  bulkEdit: false,
  phi: false,
  editable: false,
  customFieldType: null,
  dictionary: null,
```

```
    displayType: null,  
    valueType: null,  
    formula: null,  
    mask: null  
  },  
  {  
    name: 'created_at',  
    type: 'datetime',  
    meta: {  
      required: false  
    },  
    searchable: false,  
    bulkEdit: false,  
    phi: false,  
    editable: false,  
    customFieldType: null,  
    dictionary: null,  
    displayType: null,  
    valueType: null,  
    formula: null,  
    mask: null  
  },  
  {  
    name: 'source_name',  
    type: 'text',  
    meta: {  
      required: false  
    },  
    searchable: false,
```

```
    bulkEdit: false,  
    phi: false,  
    editable: false,  
    customFieldType: null,  
    dictionary: null,  
    displayType: null,  
    valueType: null,  
    formula: null,  
    mask: null  
  },  
  {  
    name: 'source_id',  
    type: 'text',  
    meta: {  
      required: false  
    },  
    searchable: false,  
    bulkEdit: false,  
    phi: false,  
    editable: false,  
    customFieldType: null,  
    dictionary: null,  
    displayType: null,  
    valueType: null,  
    formula: null,  
    mask: null  
  },  
  {  
    name: 'source_type',
```

```
type: 'text',
meta: {
  required: false
},
searchable: false,
bulkEdit: false,
phi: false,
editable: false,
customFieldType: null,
dictionary: null,
displayType: null,
valueType: null,
formula: null,
mask: null
},
{
  name: 'external_id',
  type: 'text',
  meta: {
    required: false
  },
  searchable: false,
  bulkEdit: false,
  phi: false,
  editable: false,
  customFieldType: null,
  dictionary: null,
  displayType: null,
  valueType: null,
```



```
    formula: null,  
    mask: null  
  },  
  {  
    name: 'external_guid',  
    type: 'text',  
    meta: {  
      required: false  
    },  
    searchable: false,  
    bulkEdit: false,  
    phi: false,  
    editable: false,  
    customFieldType: null,  
    dictionary: null,  
    displayType: null,  
    valueType: null,  
    formula: null,  
    mask: null  
  },  
  {  
    name: 'start_date',  
    type: 'date',  
    meta: {  
      required: false  
    },  
    searchable: false,  
    bulkEdit: false,  
    phi: false,
```

```
    editable: true,  
    customFieldType: null,  
    dictionary: null,  
    displayType: null,  
    valueType: null,  
    formula: null,  
    mask: null  
  },  
  {  
    name: 'stop_date',  
    type: 'date',  
    meta: {  
      required: false  
    },  
    searchable: false,  
    bulkEdit: false,  
    phi: false,  
    editable: true,  
    customFieldType: null,  
    dictionary: null,  
    displayType: null,  
    valueType: null,  
    formula: null,  
    mask: null  
  },  
  {  
    name: 'medication',  
    type: 'text',  
    meta: {
```

```
      required: true
    },
    searchable: false,
    bulkEdit: false,
    phi: false,
    editable: true,
    customFieldType: null,
    dictionary: null,
    displayType: null,
    valueType: null,
    formula: null,
    mask: null
  },
  {
    name: 'status',
    type: 'select',
    meta: {
      required: true,
      options: [
        {
          label: 'Active',
          value: 'b_active'
        },
        {
          label: 'Inactive',
          value: 'c_inactive'
        },
        {
          label: 'Deleted',
```

```
        value: 'd_deleted'
      }
    ]
  },
  searchable: true,
  bulkEdit: false,
  phi: false,
  editable: true,
  customFieldType: null,
  dictionary: null,
  displayType: 'SELECT',
  valueType: 'STRING',
  formula: null,
  mask: null
},
{
  name: 'last_modified_date',
  type: 'text',
  meta: {
    required: false
  },
  searchable: false,
  bulkEdit: false,
  phi: false,
  editable: true,
  customFieldType: null,
  dictionary: null,
  displayType: null,
  valueType: null,
```

```
    formula: null,  
    mask: null  
  },  
  {  
    name: 'last_modified_by',  
    type: 'text',  
    meta: {  
      required: false  
    },  
    searchable: false,  
    bulkEdit: false,  
    phi: false,  
    editable: true,  
    customFieldType: null,  
    dictionary: null,  
    displayType: null,  
    valueType: null,  
    formula: null,  
    mask: null  
  },  
  {  
    name: 'strength',  
    type: 'text',  
    meta: {  
      required: false  
    },  
    searchable: false,  
    bulkEdit: false,  
    phi: false,
```

```
    editable: true,  
    customFieldType: null,  
    dictionary: null,  
    displayType: null,  
    valueType: null,  
    formula: null,  
    mask: null  
  },  
  {  
    name: 'strength_unit',  
    type: 'text',  
    meta: {  
      required: false  
    },  
    searchable: false,  
    bulkEdit: false,  
    phi: false,  
    editable: true,  
    customFieldType: null,  
    dictionary: null,  
    displayType: null,  
    valueType: null,  
    formula: null,  
    mask: null  
  },  
  {  
    name: 'name',  
    type: 'text',  
    meta: {
```

```
      required: false
    },
    searchable: false,
    bulkEdit: false,
    phi: false,
    editable: true,
    customFieldType: null,
    dictionary: null,
    displayType: null,
    valueType: null,
    formula: null,
    mask: null
  },
  {
    name: 'is_custom_medication',
    type: 'select',
    meta: {
      required: false,
      options: [
        {
          label: 'No',
          value: 'no'
        },
        {
          label: 'Yes',
          value: 'yes'
        }
      ]
    }
  },
],
},
```

```
    searchable: false,  
    bulkEdit: false,  
    phi: false,  
    editable: true,  
    customFieldType: null,  
    dictionary: null,  
    displayType: 'SELECT',  
    valueType: 'STRING',  
    formula: null,  
    mask: null  
  },  
  {  
    name: 'drug_ndc_id',  
    type: 'text',  
    meta: {  
      required: false  
    },  
    searchable: false,  
    bulkEdit: false,  
    phi: false,  
    editable: true,  
    customFieldType: null,  
    dictionary: null,  
    displayType: null,  
    valueType: null,  
    formula: null,  
    mask: null  
  },  
  {
```



```
name: 'drug_rx_norm_id',
type: 'text',
meta: {
  required: false
},
searchable: false,
bulkEdit: false,
phi: false,
editable: true,
customFieldType: null,
dictionary: null,
displayType: null,
valueType: null,
formula: null,
mask: null
},
{
  name: 'drug_rx_norm_id_type',
  type: 'text',
  meta: {
    required: false
  },
  searchable: false,
  bulkEdit: false,
  phi: false,
  editable: true,
  customFieldType: null,
  dictionary: null,
  displayType: null,
```

```
    valueType: null,  
    formula: null,  
    mask: null  
  },  
  {  
    name: 'drug_route',  
    type: 'text',  
    meta: {  
      required: false  
    },  
    searchable: false,  
    bulkEdit: false,  
    phi: false,  
    editable: true,  
    customFieldType: null,  
    dictionary: null,  
    displayType: null,  
    valueType: null,  
    formula: null,  
    mask: null  
  },  
  {  
    name: 'drug_form',  
    type: 'text',  
    meta: {  
      required: false  
    },  
    searchable: false,  
    bulkEdit: false,
```

```
    phi: false,
    editable: true,
    customFieldType: null,
    dictionary: null,
    displayType: null,
    valueType: null,
    formula: null,
    mask: null
  },
  {
    name: 'dose',
    type: 'text',
    meta: {
      required: false
    },
    searchable: false,
    bulkEdit: false,
    phi: false,
    editable: true,
    customFieldType: null,
    dictionary: null,
    displayType: null,
    valueType: null,
    formula: null,
    mask: null
  },
  {
    name: 'dose_unit',
    type: 'text',
```

```
meta: {
  required: false
},
searchable: false,
bulkEdit: false,
phi: false,
editable: true,
customFieldType: null,
dictionary: null,
displayType: null,
valueType: null,
formula: null,
mask: null
},
{
  name: 'route',
  type: 'text',
  meta: {
    required: false
  },
  searchable: false,
  bulkEdit: false,
  phi: false,
  editable: true,
  customFieldType: null,
  dictionary: null,
  displayType: null,
  valueType: null,
  formula: null,
```

```
    mask: null
  },
  {
    name: 'dose_timing',
    type: 'text',
    meta: {
      required: false
    },
    searchable: false,
    bulkEdit: false,
    phi: false,
    editable: true,
    customFieldType: null,
    dictionary: null,
    displayType: null,
    valueType: null,
    formula: null,
    mask: null
  },
  {
    name: 'dose_other',
    type: 'text',
    meta: {
      required: false
    },
    searchable: false,
    bulkEdit: false,
    phi: false,
    editable: true,
```

```
    customFieldType: null,  
    dictionary: null,  
    displayType: null,  
    valueType: null,  
    formula: null,  
    mask: null  
  },  
  {  
    name: 'duration',  
    type: 'text',  
    meta: {  
      required: false  
    },  
    searchable: false,  
    bulkEdit: false,  
    phi: false,  
    editable: true,  
    customFieldType: null,  
    dictionary: null,  
    displayType: null,  
    valueType: null,  
    formula: null,  
    mask: null  
  },  
  {  
    name: 'quantity',  
    type: 'text',  
    meta: {  
      required: false
```

```
    },  
    searchable: false,  
    bulkEdit: false,  
    phi: false,  
    editable: true,  
    customFieldType: null,  
    dictionary: null,  
    displayType: null,  
    valueType: null,  
    formula: null,  
    mask: null  
  },  
  {  
    name: 'quantity_unit',  
    type: 'text',  
    meta: {  
      required: false  
    },  
    searchable: false,  
    bulkEdit: false,  
    phi: false,  
    editable: true,  
    customFieldType: null,  
    dictionary: null,  
    displayType: null,  
    valueType: null,  
    formula: null,  
    mask: null  
  },  
}
```

```
{
  name: 'refills',
  type: 'text',
  meta: {
    required: false
  },
  searchable: false,
  bulkEdit: false,
  phi: false,
  editable: true,
  customFieldType: null,
  dictionary: null,
  displayType: null,
  valueType: null,
  formula: null,
  mask: null
},
{
  name: 'fill_date',
  type: 'text',
  meta: {
    required: false
  },
  searchable: false,
  bulkEdit: false,
  phi: false,
  editable: true,
  customFieldType: null,
  dictionary: null,
```



```
    displayType: null,  
    valueType: null,  
    formula: null,  
    mask: null  
  },  
  {  
    name: 'stop_reason',  
    type: 'text',  
    meta: {  
      required: false  
    },  
    searchable: false,  
    bulkEdit: false,  
    phi: false,  
    editable: true,  
    customFieldType: null,  
    dictionary: null,  
    displayType: null,  
    valueType: null,  
    formula: null,  
    mask: null  
  },  
  {  
    name: 'primary_diagnosis_coding_system',  
    type: 'text',  
    meta: {  
      required: false  
    },  
    searchable: false,  
  }  
}
```

```
    bulkEdit: false,  
    phi: false,  
    editable: true,  
    customFieldType: null,  
    dictionary: null,  
    displayType: null,  
    valueType: null,  
    formula: null,  
    mask: null  
  },  
  {  
    name: 'primary_diagnosis_code',  
    type: 'text',  
    meta: {  
      required: false  
    },  
    searchable: false,  
    bulkEdit: false,  
    phi: false,  
    editable: true,  
    customFieldType: null,  
    dictionary: null,  
    displayType: null,  
    valueType: null,  
    formula: null,  
    mask: null  
  },  
  {  
    name: 'primary_diagnosis_description',
```

```
    type: 'text',
    meta: {
      required: false
    },
    searchable: false,
    bulkEdit: false,
    phi: false,
    editable: true,
    customFieldType: null,
    dictionary: null,
    displayType: null,
    valueType: null,
    formula: null,
    mask: null
  },
  {
    name: 'secondary_diagnosis_coding_system',
    type: 'text',
    meta: {
      required: false
    },
    searchable: false,
    bulkEdit: false,
    phi: false,
    editable: true,
    customFieldType: null,
    dictionary: null,
    displayType: null,
    valueType: null,
```

```
    formula: null,  
    mask: null  
  },  
  {  
    name: 'secondary_diagnosis_code',  
    type: 'text',  
    meta: {  
      required: false  
    },  
    searchable: false,  
    bulkEdit: false,  
    phi: false,  
    editable: true,  
    customFieldType: null,  
    dictionary: null,  
    displayType: null,  
    valueType: null,  
    formula: null,  
    mask: null  
  },  
  {  
    name: 'secondary_diagnosis_description',  
    type: 'text',  
    meta: {  
      required: false  
    },  
    searchable: false,  
    bulkEdit: false,  
    phi: false,
```

```
    editable: true,  
    customFieldType: null,  
    dictionary: null,  
    displayType: null,  
    valueType: null,  
    formula: null,  
    mask: null  
  },  
  {  
    name: 'patient_notes',  
    type: 'text',  
    meta: {  
      required: false  
    },  
    searchable: false,  
    bulkEdit: false,  
    phi: false,  
    editable: true,  
    customFieldType: null,  
    dictionary: null,  
    displayType: null,  
    valueType: null,  
    formula: null,  
    mask: null  
  },  
  {  
    name: 'pharmacy_notes',  
    type: 'text',  
    meta: {
```

```
      required: false
    },
    searchable: false,
    bulkEdit: false,
    phi: false,
    editable: true,
    customFieldType: null,
    dictionary: null,
    displayType: null,
    valueType: null,
    formula: null,
    mask: null
  },
  {
    name: 'office_comments',
    type: 'text',
    meta: {
      required: false
    },
    searchable: false,
    bulkEdit: false,
    phi: false,
    editable: true,
    customFieldType: null,
    dictionary: null,
    displayType: null,
    valueType: null,
    formula: null,
    mask: null
```

```
}  
]  
}
```

Problems

```
{  
  name: 'df_diagnoses_problems',  
  type: 'MULTI_RECORD',  
  fields: [  
    {  
      name: 'id',  
      type: 'text',  
      meta: {  
        required: false  
      },  
      searchable: false,  
      bulkEdit: false,  
      phi: false,  
      editable: false,  
      customFieldType: null,  
      dictionary: null,  
      displayType: null,  
      valueType: null,  
      formula: null,  
      mask: null  
    },  
    {  
      name: 'updated_by',  
      type: 'text',
```

```
meta: {
  required: false
},
searchable: false,
bulkEdit: false,
phi: false,
editable: false,
customFieldType: null,
dictionary: null,
displayType: null,
valueType: null,
formula: null,
mask: null
},
{
  name: 'updated_by_name',
  type: 'text',
  meta: {
    required: false
  },
  searchable: false,
  bulkEdit: false,
  phi: false,
  editable: false,
  customFieldType: null,
  dictionary: null,
  displayType: null,
  valueType: null,
  formula: null,
```



```
    mask: null
  },
  {
    name: 'updated_at',
    type: 'datetime',
    meta: {
      required: false
    },
    searchable: false,
    bulkEdit: false,
    phi: false,
    editable: false,
    customFieldType: null,
    dictionary: null,
    displayType: null,
    valueType: null,
    formula: null,
    mask: null
  },
  {
    name: 'created_by',
    type: 'text',
    meta: {
      required: false
    },
    searchable: false,
    bulkEdit: false,
    phi: false,
    editable: false,
```

```
    customFieldType: null,  
    dictionary: null,  
    displayType: null,  
    valueType: null,  
    formula: null,  
    mask: null  
  },  
  {  
    name: 'created_by_name',  
    type: 'text',  
    meta: {  
      required: false  
    },  
    searchable: false,  
    bulkEdit: false,  
    phi: false,  
    editable: false,  
    customFieldType: null,  
    dictionary: null,  
    displayType: null,  
    valueType: null,  
    formula: null,  
    mask: null  
  },  
  {  
    name: 'created_at',  
    type: 'datetime',  
    meta: {  
      required: false
```

```
  },  
  searchable: false,  
  bulkEdit: false,  
  phi: false,  
  editable: false,  
  customFieldType: null,  
  dictionary: null,  
  displayType: null,  
  valueType: null,  
  formula: null,  
  mask: null  
},  
{  
  name: 'source_name',  
  type: 'text',  
  meta: {  
    required: false  
  },  
  searchable: false,  
  bulkEdit: false,  
  phi: false,  
  editable: false,  
  customFieldType: null,  
  dictionary: null,  
  displayType: null,  
  valueType: null,  
  formula: null,  
  mask: null  
},
```

```
{
  name: 'source_id',
  type: 'text',
  meta: {
    required: false
  },
  searchable: false,
  bulkEdit: false,
  phi: false,
  editable: false,
  customFieldType: null,
  dictionary: null,
  displayType: null,
  valueType: null,
  formula: null,
  mask: null
},
{
  name: 'source_type',
  type: 'text',
  meta: {
    required: false
  },
  searchable: false,
  bulkEdit: false,
  phi: false,
  editable: false,
  customFieldType: null,
  dictionary: null,
```

```
    displayType: null,  
    valueType: null,  
    formula: null,  
    mask: null  
  },  
  {  
    name: 'external_id',  
    type: 'text',  
    meta: {  
      required: false  
    },  
    searchable: false,  
    bulkEdit: false,  
    phi: false,  
    editable: false,  
    customFieldType: null,  
    dictionary: null,  
    displayType: null,  
    valueType: null,  
    formula: null,  
    mask: null  
  },  
  {  
    name: 'external_guid',  
    type: 'text',  
    meta: {  
      required: false  
    },  
    searchable: false,
```

```
bulkEdit: false,  
phi: false,  
editable: false,  
customFieldType: null,  
dictionary: null,  
displayType: null,  
valueType: null,  
formula: null,  
mask: null  
},  
{  
  name: 'diagnosis_coding_system',  
  type: 'select',  
  meta: {  
    required: true,  
    options: [  
      {  
        label: 'ICD-9',  
        value: 'icd_9'  
      },  
      {  
        label: 'ICD-10',  
        value: 'icd_10'  
      },  
      {  
        label: 'SNOMED CT',  
        value: 'snomed_ct'  
      }  
    ]  
  }  
}
```

```
  },  
  searchable: false,  
  bulkEdit: false,  
  phi: false,  
  editable: true,  
  customFieldType: null,  
  dictionary: null,  
  displayType: 'SELECT',  
  valueType: 'STRING',  
  formula: null,  
  mask: null  
},  
{  
  name: 'code',  
  type: 'text',  
  meta: {  
    required: false  
  },  
  searchable: false,  
  bulkEdit: false,  
  phi: false,  
  editable: true,  
  customFieldType: null,  
  dictionary: null,  
  displayType: null,  
  valueType: null,  
  formula: null,  
  mask: null  
},
```

```
{
  name: 'description',
  type: 'text',
  meta: {
    required: false
  },
  searchable: false,
  bulkEdit: false,
  phi: false,
  editable: true,
  customFieldType: null,
  dictionary: null,
  displayType: null,
  valueType: null,
  formula: null,
  mask: null
},
{
  name: 'onset_date',
  type: 'date',
  meta: {
    required: false
  },
  searchable: false,
  bulkEdit: false,
  phi: false,
  editable: true,
  customFieldType: null,
  dictionary: null,
```



```
    displayType: null,  
    valueType: null,  
    formula: null,  
    mask: null  
  },  
  {  
    name: 'last_modified_by',  
    type: 'text',  
    meta: {  
      required: false  
    },  
    searchable: false,  
    bulkEdit: false,  
    phi: false,  
    editable: true,  
    customFieldType: null,  
    dictionary: null,  
    displayType: null,  
    valueType: null,  
    formula: null,  
    mask: null  
  },  
  {  
    name: 'last_modified_date',  
    type: 'text',  
    meta: {  
      required: false  
    },  
    searchable: false,
```

```
bulkEdit: false,  
phi: false,  
editable: true,  
customFieldType: null,  
dictionary: null,  
displayType: null,  
valueType: null,  
formula: null,  
mask: null  
},  
{  
  name: 'status',  
  type: 'select',  
  meta: {  
    required: true,  
    options: [  
      {  
        label: 'Active',  
        value: 'b_active'  
      },  
      {  
        label: 'Inactive',  
        value: 'c_inactive'  
      },  
      {  
        label: 'Deleted',  
        value: 'd_deleted'  
      },  
      {
```

```
        label: 'Resolved',  
        value: 'e_resolved'  
    }  
],  
    multiple: false  
},  
    searchable: true,  
    bulkEdit: false,  
    phi: false,  
    editable: true,  
    customFieldType: null,  
    dictionary: null,  
    displayType: 'SELECT',  
    valueType: 'STRING',  
    formula: null,  
    mask: null  
}  
]  
}
```