



Medications 2.0 Transition Guide

May 2025

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Getting Started

What is Medications 2.0?

To provide ongoing improvements that will result in better outcomes for your agency, AlayaCare has revamped the Medication module.

Medications 2.0 allows users to enter, store and retrieve medication data efficiently and safely. This process is easy and error free at the point of care with use of custom medication libraries, custom system settings, and enhanced reporting capabilities.

View our [Zendesk Article](#) for an overview of Medications 2.0.

Who Needs to Transition?

If your agency is currently using Medications 1.0 you will need to transition to Medications 2.0. Not sure if you are currently using Medications 1.0 or 2.0? Take a look at the images below to see what your environment would look like for each version.

1.0 VS 2.0 Medication Profile

The image displays two screenshots of the AlayaCare software interface, comparing the Medication 1.0 and Medication 2.0 versions. Red arrows indicate the transition from the 1.0 interface to the 2.0 interface.

Medication 1.0 Interface:

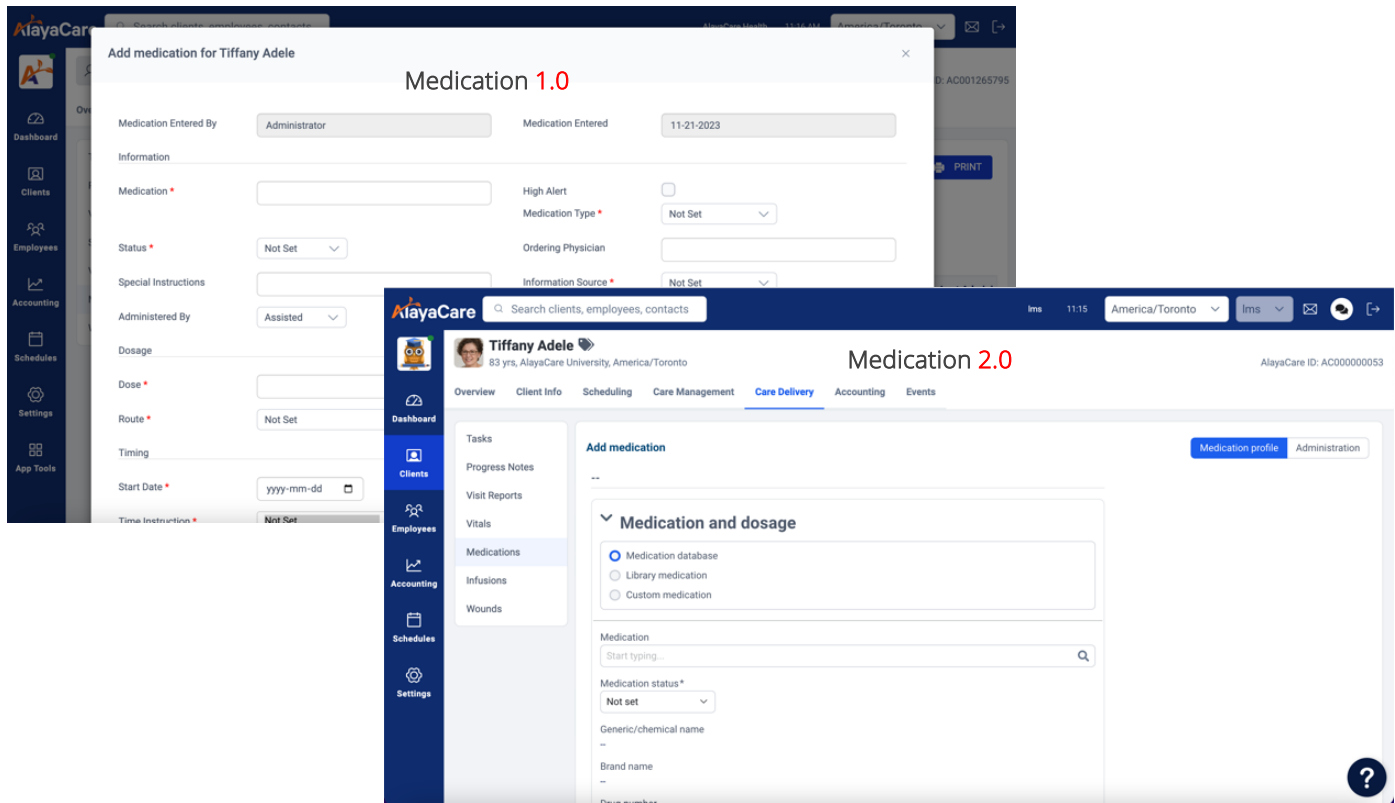
- Header: AlayaCare, Search clients, employees, contacts, AlayaCare Health, 11:18 AM, America/Toronto.
- Client: Tiffany Adele, 83 yrs, America/Toronto, AlayaCare ID: AC001265795.
- Navigation: Overview, Client Info, Scheduling, Care Management, Care Delivery, Accounting, Events.
- Left Sidebar: Dashboard, Clients, Employees, Accounting, Schedules, Settings, App Tools.
- Main Content: + Add Medication, Active, High Alert, Administered By, Type, Route, Time Instruction, Discrepancy, PRINT button.

Medication 2.0 Interface:

- Header: AlayaCare, Search clients, employees, contacts, 11:07, America/Toronto, lms.
- Client: Tiffany Adele, 83 yrs, AlayaCare University, America/Toronto, AlayaCare ID: AC000000053.
- Navigation: Overview, Client Info, Scheduling, Care Management, Care Delivery, Accounting, Events.
- Left Sidebar: Dashboard, Clients, Employees, Accounting, Schedules, Settings.
- Main Content: Medication profile, Administration, View all interactions, Print blank MAR, + Add, 0 medications selected, Print profile report, Change 485 statuses to Ongoing, Change medication statuses.
- Table:

Medication name	Status	Ingredient strength	Dosage form	Dosage/quantity	Route	Frequency	
Fluticasone (Flovent Discus 250)	Active	250 mcg		1 Spray(s)	NA - Nasal	2 times/week	View
Advil (Advil)	Active			1 Cap	PO - Oral	Daily	View
Albuterol Sulfate (Ventolin HFA)	Active	108 (90 Base) mcg/act	Aerosol Soln	2 Puff(s)	IN - Inhalation	BID - Twice a day	View
Metoprolol Tartrate	Active	50 mg	Tablet(s)	50 mg	PO - Oral	Daily	View

Adding a Medication in 1.0 VS 2.0



Customers with existing data in Medications 1.0:

If your agency is live/operational with AlayaCare and is eligible to transition to Medications 2.0 at this time (*see details on eligibility in section above*), you can **migrate to Medications 2.0 with a data transfer**. This will ensure all your current medication data is brought over during the transition.

Customers with NO existing data in Medications 1.0:

If you are currently implementing onto AlayaCare, you will automatically be implemented onto Medications 2.0. No transition is required for you!

What are the Differences Between Medications 1.0 and 2.0?

For a side-by-side list comparison of Meds 1.0 VS 2.0 please see our comparison document found at the bottom of this article [here](#).

Medications 2.0 Training Videos in AlayaCare University (ACU)

Review the videos on Medications 2.0 in [ACU Foundations](#) to gain an understanding of Medications 2.0. If you have [ACU Certifications](#) you can also view the videos there.

Transition Process

Once you **determine you are eligible** and decide you would like to transition to the Medications 2.0 module, follow the steps found in the [Transition Steps section](#) below.

You will be given access to Medications 2.0 first in your UAT environment, you will then **test and validate** with real data in your Staging environment, and finally **approve** the feature to go live in your Production environment.

Client medication data will be available in your **production** environment's **Data Exploration (DE)**. Medication 1.0 data will remain in DE to allow you to compare client medication profiles before and after your migration. The appropriate fields can be found in the **Client Explore** and are listed at the [end of this document](#).

Transition Steps

Step 1: Familiarize Yourself With Medications 2.0

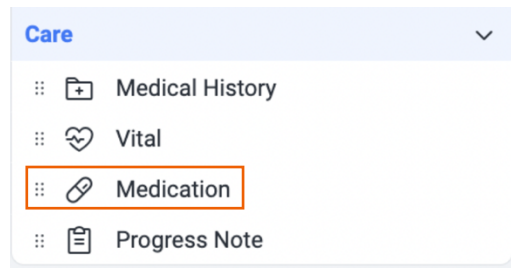
Before getting started, take time to **understand the new workflow** for Medications 2.0 by reviewing the [Feature Comparison document](#) and the various [Zendesk articles](#).

Watch the Medications 2.0 training videos in [ACU Foundations](#) or [ACU Certifications](#).

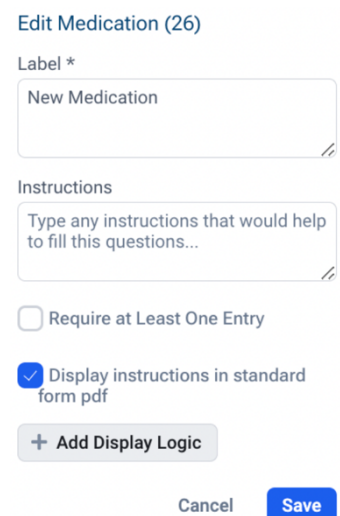
Step 2: (If Required) Approve All Forms with Advanced Form Components in UAT

Any form submissions containing Meds 1.0 [advanced components](#) should all be **approved before the transition** from Meds 1.0 to Meds 2.0 begins. This will ensure that all medications from form submissions are added to the respective client profiles before migrating.

If your forms do not use advanced components, you do not have to do this step.



The screenshot shows a dropdown menu titled 'Care' with a downward arrow. It contains four items, each with a double colon icon and a text label: 'Medical History' with a folder icon, 'Vital' with a heart icon, 'Medication' with a pill icon (highlighted by an orange rectangular box), and 'Progress Note' with a notepad icon.



The screenshot shows the 'Edit Medication (26)' form. It has a 'Label *' field with the text 'New Medication'. Below it is an 'Instructions' field with the placeholder text 'Type any instructions that would help to fill this questions...'. There are two checkboxes: 'Require at Least One Entry' (unchecked) and 'Display instructions in standard form pdf' (checked). At the bottom, there is a '+ Add Display Logic' button, and 'Cancel' and 'Save' buttons.

Step 3: Submit a Zendesk Ticket to Activate Medications 2.0 in UAT

Submit a ticket through Zendesk:

- 1) Navigate to alayacare.zendesk.com to submit a request
- 2) Choose Transition Request | Meds 2.0 from the issue selection dropdown
- 3) For the Testing Stage, select UAT Stage 1- Mandatory
- 4) Fill out all other fields as required
 - a. For the subject field indicate "Activate Medications 2.0 in UAT".

Please note that your UAT environment will undergo a data transfer to receive all your production environment's current data. This will ensure that you have medication data that you can accurately test in UAT.

Submit a request

Please choose your issue below

Transition Request | Meds 2.0

CC

Add emails

Subject *

Testing Stage

UAT (stage 1 - mandatory)

Please indicate your testing stage. You must start at UAT, then Staging and finish with Production

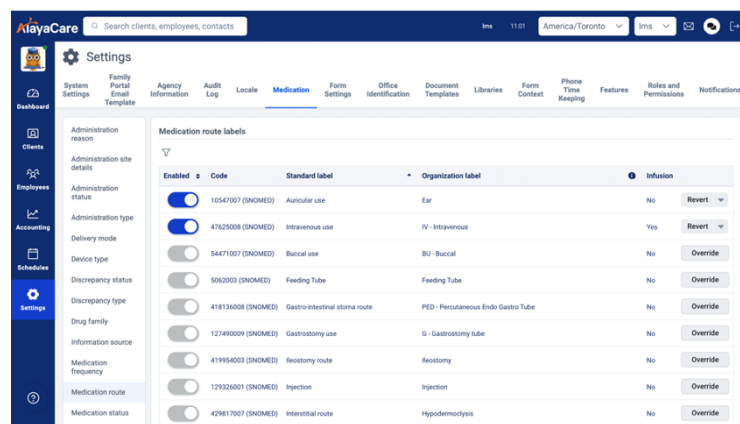
Step 4: Set Up, Validate, Correct and Test in your UAT Environment

Once enabled, set up, test, correct, and validate to ensure that your data has been transferred correctly and you are comfortable with your end-to-end workflow process for Medications 2.0 in your environment. Complete parts 1 – 5.

Part 1: Set Up Medical System Settings and ACLs

Once the feature has been activated in your environment, ensure that BEFORE anyone in your agency starts navigating into client medication profiles, you have set up the Medical System Settings.

Medication 1.0 data is transferred to 2.0 for a client at the instance a user enters the client's Medication Profile for the first time. This is why it is best to configure the Medication settings FIRST to ensure all required fields are active and match for when the transfer to 2.0 occurs.



Navigate to **Settings > Medication** and enable any additional required Medical Settings. You can use this [Zendesk article](#) to help you set up your Medical System Settings. For the majority of cases, all required fields will already be on.

Remember to turn on any **Medications 2.0 ACLs** in **Roles and Permissions** for each employee role. These include ACLs related to medical system settings, administrations and more. These can be found under the **clinical** dropdown.

Part 2: Validate the Medications 2.0 Data Transferred Correctly

For **UAT and STAGING complete these steps for at least **half a dozen clients** making sure to target complex cases.*

***For **PRODUCTION** complete these steps for **EVERY client and each of their medications**.*

1) Go to the client's **medication profile**

- *Client profile > Care Delivery > Medications*

2) Review the **client's list of medications** to make sure they are all present

- *Tip: Compare each client's list of medications in your Meds 2.0 environment to an environment that is still in Meds 1.0, or run a DE report in your Production environment.*

3) Make sure there are **no missing or incorrect fields** for each medication.

- Any fields that do not get transferred over correctly will be pulled into the **Administration Instructions** section

The screenshot shows the AlayaCare interface for a client named Tiffany Adele. The 'Medications' tab is selected, displaying the profile for 'Fluoxetine HCl (PROzac), 10 mg Capsule(s), 10 mg, PO - Oral, Daily (Active)'. The status is 'ACTIVE'. The 'Medication and dosage' section lists: Generic/chemical name: Fluoxetine HCl, Brand name: PROzac, DIN: --, Ingredient strength: 10 mg, Dosage form: Capsule(s), Dosage/quantity: 10 mg, Route: PO - Oral, and Administration site details: --. The 'Timing' section shows: Start date: 2023-05-24, End date: End date/time unknown, Count: --, Administration times: 09:00, Days of the week: --, Days of the month: --, and Administration instructions: -- (highlighted with an orange box).

4) From the **client's medication profile** > click on the **administration** tab to access the **Electronic Medication Administration Record (eMAR)**.

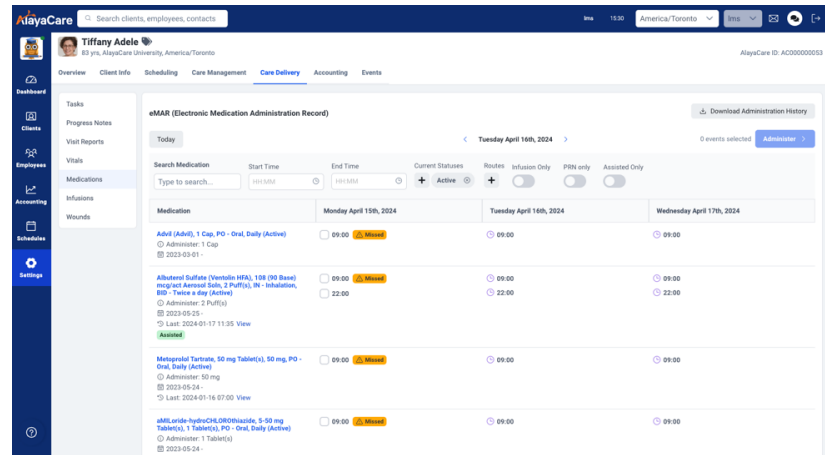
The screenshot shows the AlayaCare interface for the same client, Tiffany Adele, but with the 'Administration' tab selected. The 'Medication profile' section shows '0 medications selected'. Below this is a table with columns: Medication name, Status, Ingredient strength, Dosage form, Dosage/quantity, Route, Frequency, and a 'View' button. One medication is listed: 'Fluticasone (Flovent Discus 250)' with a status of 'Discontinued', strength of '250 mcg', dosage form of '1 Spray(s)', route of 'NA - Nasal', and frequency of '2 times/week'.

5) Make sure all medications which should have **administration events** are being **projected correctly** in the eMAR.

6) If fields have not been transferred over correctly, or planned administrations have **not been pulled into the eMAR**, proceed to make the required **corrections** (see [part 3](#) below).

- o *Expect that corrections will likely be needed due to the differing field structures between Meds 1.0 and 2.0 (e.g. free text field in 1.0 vs a dropdown field in 2.0).*

7) **Suggestion:** If no corrections are needed, or once corrections are made, **make a note on the client's profile** (using a progress note or adding a client note) to confirm that the client's medication profile/eMAR has been validated.



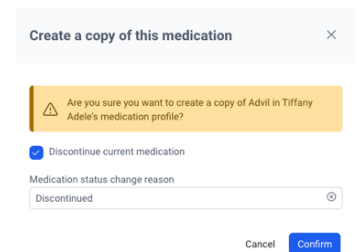
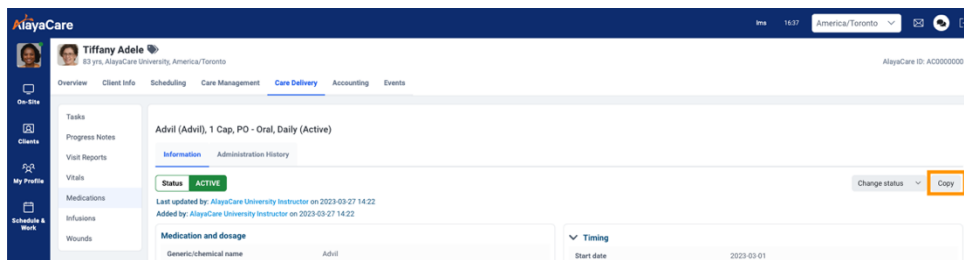
Part 3: Make Required Corrections (only complete this step as needed)

*For **UAT and STAGING** complete these steps for at least **half a dozen clients** (target complex cases).

For **PRODUCTION complete these steps for **EVERY client** if corrections are needed.

If you notice that any information was **not transferred** over to the correct fields for certain medications on a client's medication profile, or that **medication administration events are not projecting** in the eMAR because of incorrect/empty fields, these are the **recommended steps**:

- 1) Click **View** to enter into the **medication's information**
- 2) **Copy** the Medication
- 3) Check off the box to **discontinue the current medication**
- 4) **Confirm** the selection



- 5) Change the details in the fields that need to be updated/corrected
 - a. Remember, any fields that were not carried over correctly will be added to *“administration Instructions”* - they will not be lost. Take those details and add them to their correct fields.
- 6) **Save** the corrected medication onto the client’s profile

The medication along with all the medication details will now be **entered correctly** on the client’s profile and the old version will be discontinued.

OR

- 1) For the time being, document any required medication administration events as **“Unplanned Administrations”**.
 - a. This is a **temporary solution** if you do not have the time to make changes immediately.

Select administration event

Date

Administration events*

☒ Unplanned

⚠️ Unplanned administration events bypass all Timings rules. It will be displayed as an unexpected special event.

In your **Production environment**, every single medication for each client must be **checked, and corrected** as needed, to ensure the medication information is correct.

Part 4: Test your End-to-End Medications 2.0 Workflows

Items to set up & test: Use the [documentation on Zendesk](#) as a guide for how to set everything up and test your workflows. There are articles for each of the items below and more.

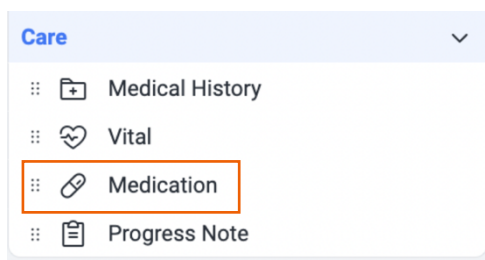
- 1) Understanding the required [permissions \(ACLs\)](#)
- 2) Configuring (creating) a [custom medication library](#)
- 3) Uploading to the custom medication library
 - a. [Manually](#) and by [importing](#)
- 4) [Adding a medication](#)
 - a. Manually and from your custom medication library
- 5) Navigating the client’s [medication profile](#)
 - a. Editing a medication
- 6) Adding a medication [administration](#)
- 7) Pulling a [medication profile report](#) and [medication administration report](#)
- 8) Testing the medication workflow on the [mobile app](#).

Test your Meds 2.0 workflows end-to-end before proceeding to the next step.

Part 5: (Only If Required) Update Forms That Utilize Advanced Form Components

If your forms utilize [advanced form components for medications](#):

create a **new version** of the form, **remove** the Meds 1.0 component from the form, **add** in the new Meds 2.0 component to the form, and publish.

A screenshot of a software interface showing a dropdown menu titled 'Care'. The menu is open, displaying four options: 'Medical History' (with a folder icon), 'Vital' (with a heart icon), 'Medication' (with a pill icon and highlighted by an orange border), and 'Progress Note' (with a notepad icon).

Edit Medication (26)

Label *

New Medication

Instructions

Type any instructions that would help to fill this questions...

☐ Require at Least One Entry

☒ Display instructions in standard form pdf

+ Add Display Logic

Cancel

Save

Step 5: Communicate the Transition Plan to your Agency

Scroll to the bottom of this document to view an [email communication template](#) to send to your agency.

Suggestions include:

- o Email communications with your training resources
- o Training sessions (if required)

Step 6: (If Required) Approve All Forms with Advanced Form Components in Staging

Any form submissions containing Meds 1.0 [advanced components](#) should all be approved before the transition from Meds 1.0 to Meds 2.0 begins. This will ensure that all medications from form submissions are added to the respective client profiles before migrating.

If your forms do not use advanced components for medications, you do not need this step.

Step 7: Submit a Zendesk ticket to Activate Meds 2.0 in Staging

Once you have tested and validated your new workflows in your UAT environment you can request for Medications 2.0 to be turned on in your staging environment.

Medications 2.0 will be turned on in your staging environment and the medication data will be transferred there for validation. Your staging environment is an exact copy of your production environment from the previous day, which makes it great for testing.

Ticket Timing Details: If your ticket request is received by Monday at 5PM EST of the current week, it will be actioned, and your **staging** environment will have Medications 2.0 turned on for the Thursday of that week at 7AM EST.

Submit a ticket through Zendesk:

- 1) Navigate to alayacare.zendesk.com to submit a request
- 2) Choose Transition Request | Meds 2.0 from the issue selection dropdown
- 3) For the Testing Stage, select Staging Stage 2-Mandatory
- 4) Fill out all other fields as required
 - a. For the subject field indicate "Activate Medications 2.0 in Staging".

The data in your Staging environment refreshes every night at midnight. Therefore, once Medication 2.0 is turned on in Staging you must validate it that day.

Submit a request

Please choose your issue below

Transition Request | Meds 2.0

CC

Add emails

Subject *

Testing Stage

Staging (stage 2 - mandatory)

Please indicate your testing stage. You must start at UAT, then Staging and finish with Production

Do you consent to activating a staging run? *

Yes

Medication 2.0 will be turned on in your Staging environment and the medication data (if your agency has any) will be transferred there for validation. Your staging environment is an exact copy of your production environment from the previous day, which makes it great for testing.

Please activate staging on this date *

Staging will be activated Thursday at 7am EST, requests must be received by 5pm EST on Monday of that week. If

Step 8: Set Up, Validate, Correct, and Test in your Staging Environment

Once enabled, **set up, test, correct, and validate** to ensure that your data has been transferred correctly and you are comfortable with your end-to-end workflow process for Medications 2.0 in your Staging environment.

Please repeat [Step 4, Parts 1-5](#) (found above) in your Staging environment.

Remember, once the data is in your Staging environment, you will have until **midnight that day to **validate** that the medications have been transferred correctly.*

Step 9 (If Required): Let your Support Agent Know if you Need More Time to Test

If you need more time to review the data (*remember, it only lasts until midnight and then will revert back to a Staging environment without Meds2.0*), communicate that to your Support Representative and request for Medications 2.0 to be activated in your staging environment again the following Thursday.

If there are any medication data transfer issues that you find, please relay them to your Support Representative. However, **first please complete the correction steps** which can be found in [Step 4, Part 3](#). These types of issues can be corrected yourself.

Step 10: (If Required) Approve All Forms with Advanced Form Components in PROD

Any form submissions containing Meds 1.0 [advanced components](#) should all be approved before the transition from Meds 1.0 to Meds 2.0 begins. This will ensure that all medications from form submissions are added to the respective client profiles before migrating.

If your forms do not use advanced components, you do not have to do this step.

Edit Medication (26)

Label *

New Medication

Instructions

Type any instructions that would help to fill this questions...

☐ Require at Least One Entry

☒ Display instructions in standard form pdf

+ Add Display Logic

Cancel Save

Step 11: Submit a Zendesk Ticket to Activate Meds 2.0 in PROD

Once you have tested and validated that the Medication data was transferred correctly in your Staging environment you can request for Medications 2.0 to be turned on in Production.

Please note that if you have medication data from Medications 1.0 that you would like transferred to Medications 2.0 you will undergo a data transfer.

Submit a ticket through Zendesk:

- 1) Navigate to alayacare.zendesk.com to submit a request
- 2) Choose Transition Request | Meds 2.0 from the issue selection dropdown
- 3) For the Testing Stage, select Production Stage 3 - Mandatory
- 4) Fill out all other fields as required
 - a. Make sure you indicate the date you would like Meds 2.0 to be turned on in your Production environment. Please provide at least 3 business days.

Submit a request

Please choose your issue below

Transition Request | Meds 2.0

CC

Add emails

Subject *

Testing Stage

Production (stage 3 - mandatory)

Please indicate your testing stage. You must start at UAT, then Staging and finish with Production

Do you consent to activating Meds 2.0 on production? *

-

Please migrate to production on this date *

- b. For the subject field indicate “Activate Medications 2.0 in Production”.

Step 12: Set Up, Validate, Correct and Test in your PROD Environment

Once enabled, **set up, test, correct, and validate** to ensure that your data has been transferred correctly and you are comfortable with your end-to-end workflow process for Medications 2.0 in your Production environment.

Please repeat [Step 4, Parts 1-5](#) (found above) in your Production environment.

During [Step 4, Part 2](#) your agency must complete this step for EVERY single client in your environment to ensure accuracy.

Step 13: Start Using Medications 2.0 in Production

That’s everything! You can now start to use the feature in your production environment.

Troubleshooting and Tips

Fields are not being transferred over correctly:

If any Meds 1.0 fields cannot be mapped over to a field in Meds 2.0, they will be added to the Administration Instructions section of the Medication Profile. They will not be lost. This is usually due to incorrect entry in fields of Meds 1.0 or a different field structure in 2.0 compared to 1.0 (*e.g. free text in 1.0 vs a dropdown in 2.0*). **To correct this:**

- 1) Click **View** to enter into the medication’s information
- 2) **Copy** the Medication
- 3) Check off the box to **discontinue the current medication**
- 4) **Confirm** the Selection
- 5) **Change the details** in the fields that need to be updated/corrected that may be incorrect due to the transfer
 - a. *Any fields that were not carried over correctly will be added to “administration Instructions”. Take those details and add them to their correct fields.*
- 6) **Save** the corrected medication onto the client’s profile

A client’s medication administration event is not showing up in the eMAR:

If the fields that dictate an administration event’s timing were not filled out correctly or added to the wrong field initially in Meds 1.0, an administration event for that

medication will not appear in the client's eMAR. These include fields indicating whether the medication is assisted or not assisted, the frequency, the start date as well as administration times. To correct this:

- 1) Follow the **same steps as listed above** for fields not transferring correctly to add in the correct administration information

OR

- 2) For the time being, document any required medication administrations as "Unplanned Administrations"

Tip: Make sure you have configured your Medication System Settings first!

The medication data transfer (from 1.0 to 2.0) occurs on a client-by-client basis at the occurrence of an employee's first entry into the client's medication profile. It is important to make sure you have correctly configured your **medication system settings first**. This helps ensure that when employees start entering into client medication profiles and the medication data transfer occurs for that client, the information can be transferred into their appropriate fields and does not get placed in the Administration Instructions (which will happen if there is no appropriate field available for the data to be transferred to).

- Meds 2.0 comes pre-configured, and unless your agency has additional fields that need to be enabled can be left as is.

Email Communication

Email Communication to Employees at Agency
<p>We have exciting news!</p> <p>__INSERT AGENCY NAME__ is taking steps to better manage patient care. We will now be using AlayaCare's Medications 2.0 feature.</p> <p>Medications 2.0 allows users to enter, store and retrieve medication data efficiently and safely. This process is easy and error free at the point of care with the use of custom medication libraries, custom system settings, and enhanced reporting capabilities.</p> <p>Some of the exciting capabilities include the following [INCLUDE ALL THAT APPLY]:</p> <ul style="list-style-type: none">• Medication Settings• Medication Library• Adding a Medication

- Client Medication Profile
- Medication Profile Report & Medication Administration Report – *Web only, not mobile*
- Ability to pull Medications to a 485 (US) – *Web only, not on mobile*
- Medication Database (US)
- Medication Administrations
- Electronic Medication Administration Record (eMAR)
- Medication Administration History Reports – *Web only, not on mobile*

The following **resources** can be used to **help you learn about Medications 2.0** and what it entails: [LINK RESOURCES BELOW AS NEEDED]

- Link to relevant videos
- Link to relevant Zendesk Articles
- Etc.

We will start using Medications 2.0 on ____*Insert date here*____.

Medications 2.0 will **increase our agency's operational efficiencies** and help us provide better patient care. If you have any questions, please reach out to ____*Insert individual here*____.

Regards,

[INSERT AGENCY NAME HERE]

DE Report

You can create **two separate DE reports** to compare clients' medications in Meds 1.0 vs 2.0. The appropriate fields can be found in the **Client Explore**.

1.0 Medication Fields in D.E.	2.0 Medication Fields in D.E.
medication.created_date_date	v2_medications.administration_instructions
medication.date_completed_date	v2_medications.administration_site_details
medication.delivery_mode	v2_medications.administration_times
medication.discrepancy	v2_medications.administration_type
medication.discrepancy_note	v2_medications.brand_name
medication.discrepancy_status	v2_medications.count_number
medication.dosage_type	v2_medications.discrepancy_note
medication.dose	v2_medications.discrepancy_status

medication.end_date_date	v2_medications.discrepancy_type
medication.high_alert	v2_medications.dosage
medication.information_source	v2_medications.dosage_form
medication.medication	v2_medications.dosage_unit
medication.medication_id	v2_medications.drug_family
medication.medication_type	v2_medications.drug_info_number
medication.ordering_physician	v2_medications.ends_on_date_date
medication.route	v2_medications.frequency
medication.special_instructions	v2_medications.generic_name
medication.start_date_date	v2_medications.healthcare_professional_notified
medication.time_instruction	v2_medications.high_alert
client_attributes_generic.full_name	v2_medications.information_source
	v2_medications.ingredient_strength
	v2_medications.ingredient_strength_unit
	v2_medications.v2_medication_id
	v2_medications.medication_status
	v2_medications.medication_types
	v2_medications.narcotic
	v2_medications.needs_education
	v2_medications.ordering_physician
	v2_medications.PRN
	v2_medications.PRN_reason
	v2_medications.purpose
	v2_medications.route
	v2_medications.start_date_date
	v2_medications.start_time
	v2_medications.updated_on_date
	v2_medications.website

Additionally, you can upload the following **JSON file** in **Data Exploration** to create a **client medication report**. You can find the file in the Zendesk article linked [here](#).