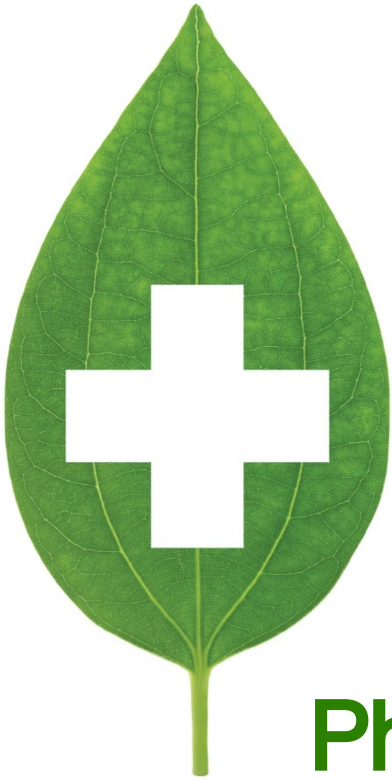

Pharmacy

Kroll User Guide

March 2025

TELUS Health

Proprietary Notice

REVISIONS

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Chapter 1

Introduction

Kroll is an advanced prescription management solution that gives pharmacies the tools to handle the complexities of modern prescription dispensing. It offers a powerful, visually appealing approach to prescription dispensing that improves the productivity, efficiency, and security of your pharmacy's operations.

This user guide is intended for new Kroll users. It describes how to navigate the software, manage patient, drug, and prescriber records, and fill and manage patient prescriptions. For more information, please visit the Kroll website.

Chapter 2

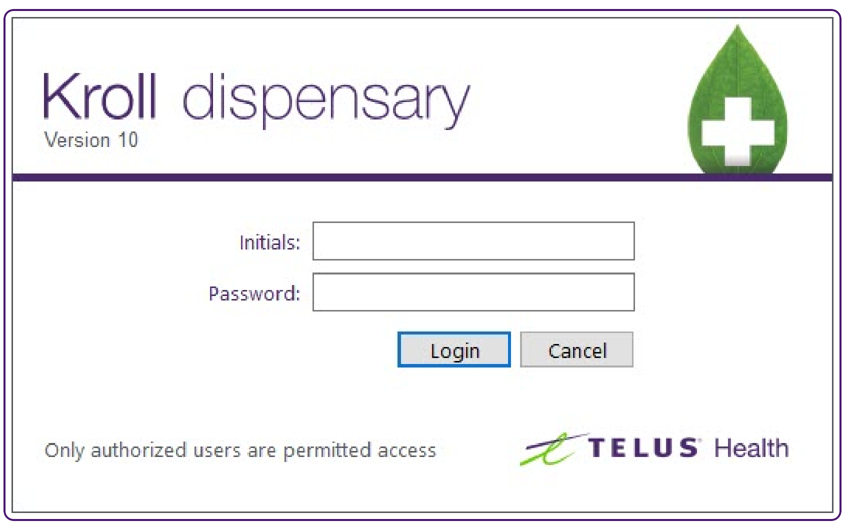
Logging in and out of Kroll

This section explains how to log in and out of the Kroll application. You must have Kroll user credentials.

Logging in

1. Double-click the Kroll shortcut icon on your desktop.

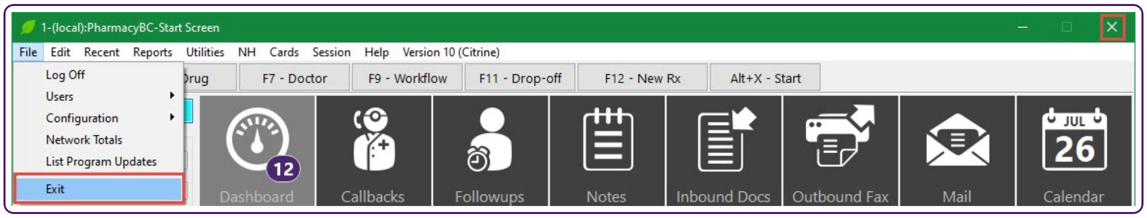
   The Kroll login window is displayed.



2. Enter your **Initials** and **Password** and select **OK**.

Logging out

1. Select **File** > **Exit**, or select the X in the top right corner of your window.



   A prompt appears, asking if you are sure you want to exit.

2. Select **Yes**.

   Another prompt appears, asking if you want to print the **Dayend Label**.

3. Select **Yes** if you want to print the label.

   If you answered **Yes** to the **Dayend Label** prompt, another prompt appears, asking if you want to get the Network Totals.

4. Select **Yes** to generate the Adjudication Totals report.

> It is not necessary to print the Dayend Label or Network Total for each session; one printout of each report includes all Rxs filled that day.

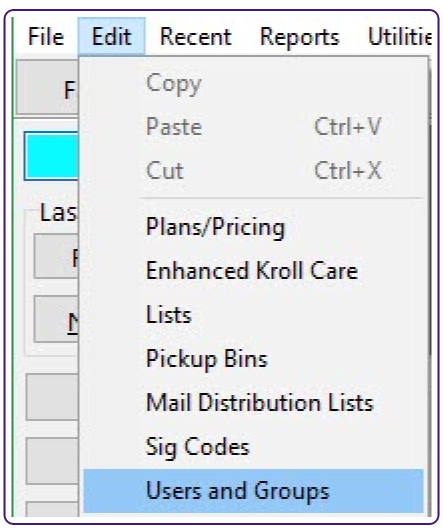
Chapter 3

Users and groups

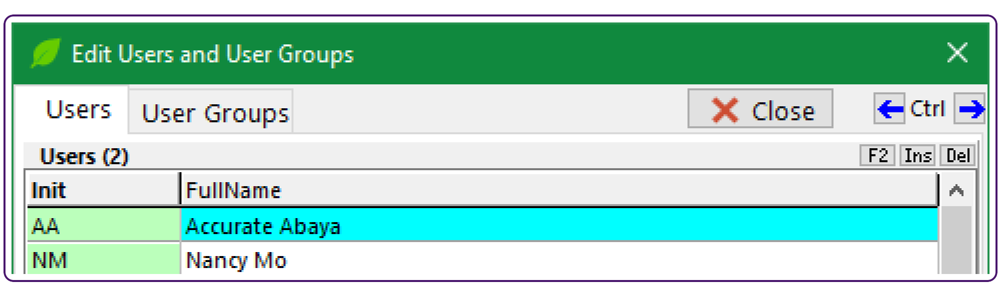
This section explains how to add and manage user accounts so that pharmacy users can access and use Kroll.

Adding a user

1. From the **Alt-X Start** window, select **Edit** > **Users and Groups**.

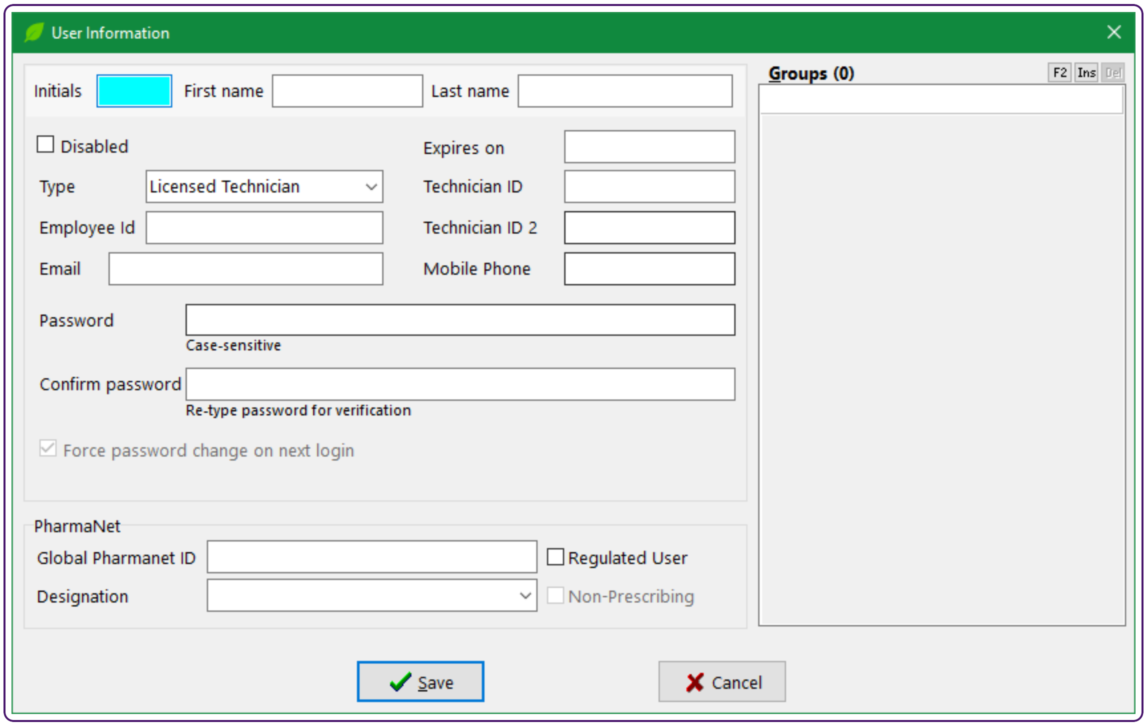


The **Edit Users and User Groups** window is displayed.



2. Select **Ins**.

   The **User Information** window is displayed.



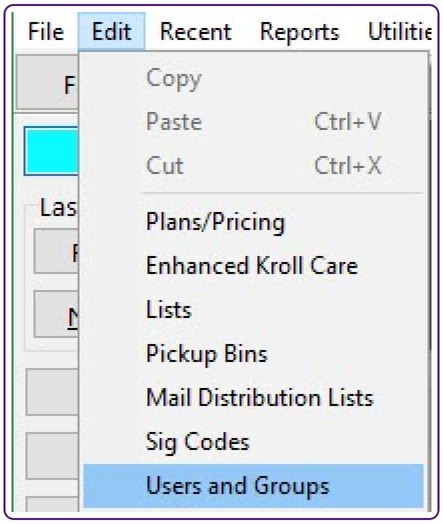
3. Complete the fields, and add the user to at least one user group.
4. Select **Save**.

   The new user is added to the **Users** list on the **Edit Users and User Groups** window.

   Provide the user with their initials and preliminary password. The user will have to change their password immediately after their first log in.

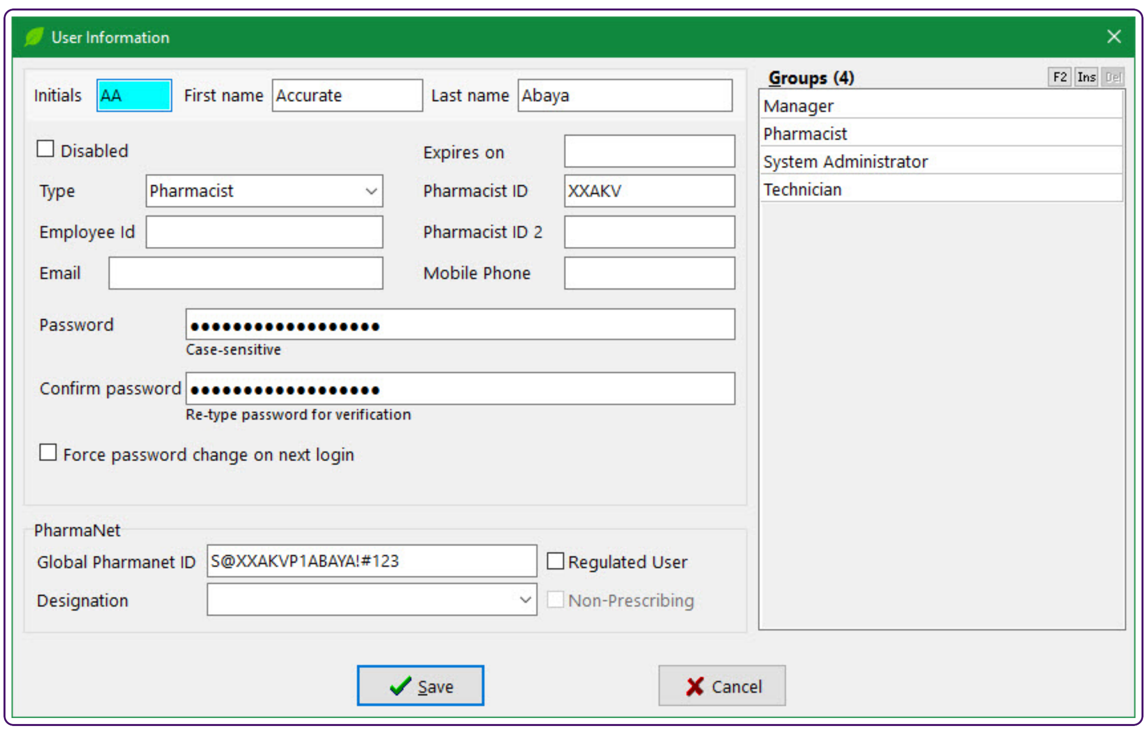
Editing a user profile

1. From the **Alt-X Start** window, select **Edit** > **Users and Groups**.



2. Select the user you want to edit, and select **F2**.

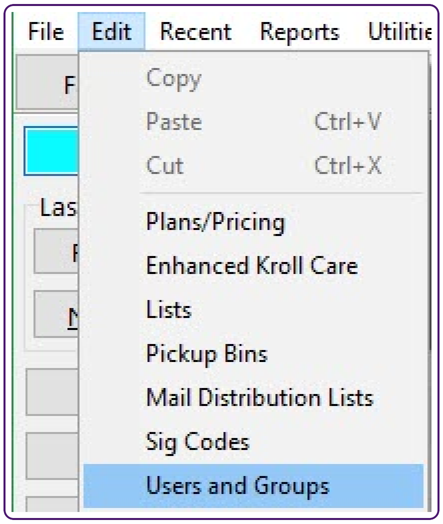
   The **User Information** window is displayed.



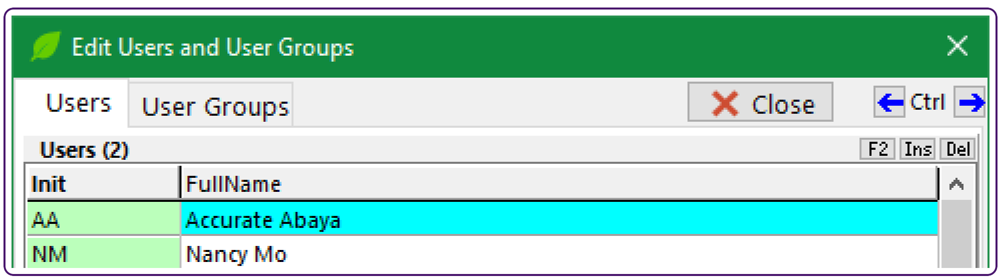
3. Update the necessary information, then select **Save**.

Deleting a user profile

1. From the **Alt-X Start** window, select **Edit** > **Users and Groups**.



The **Edit Users and User Groups** window is displayed.



2. Select the user you want to delete, then select **Del**.

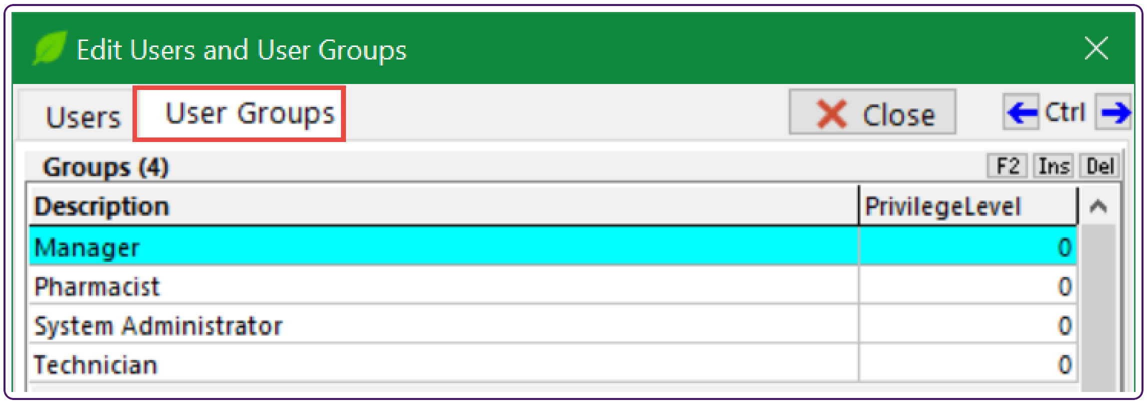
   A prompt appears, asking if you are sure you want to delete this user.

3. Select **Yes**.

Adding a user group

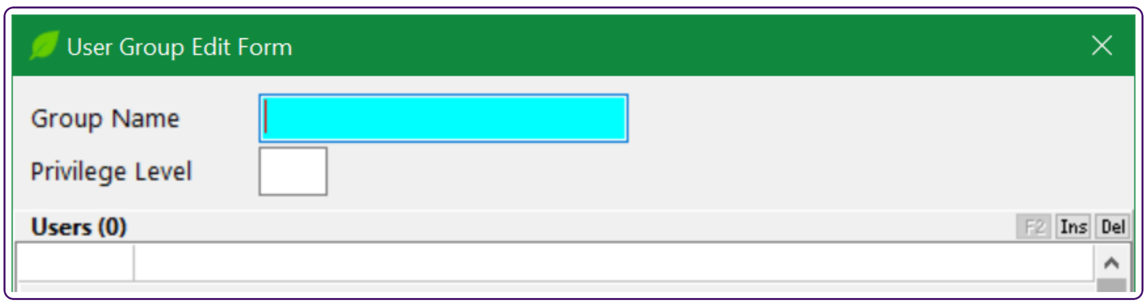
1. From the **Alt-X Start** window, select **Edit** > **Users and Groups**.

   The **Edit Users and User Groups** window is displayed.

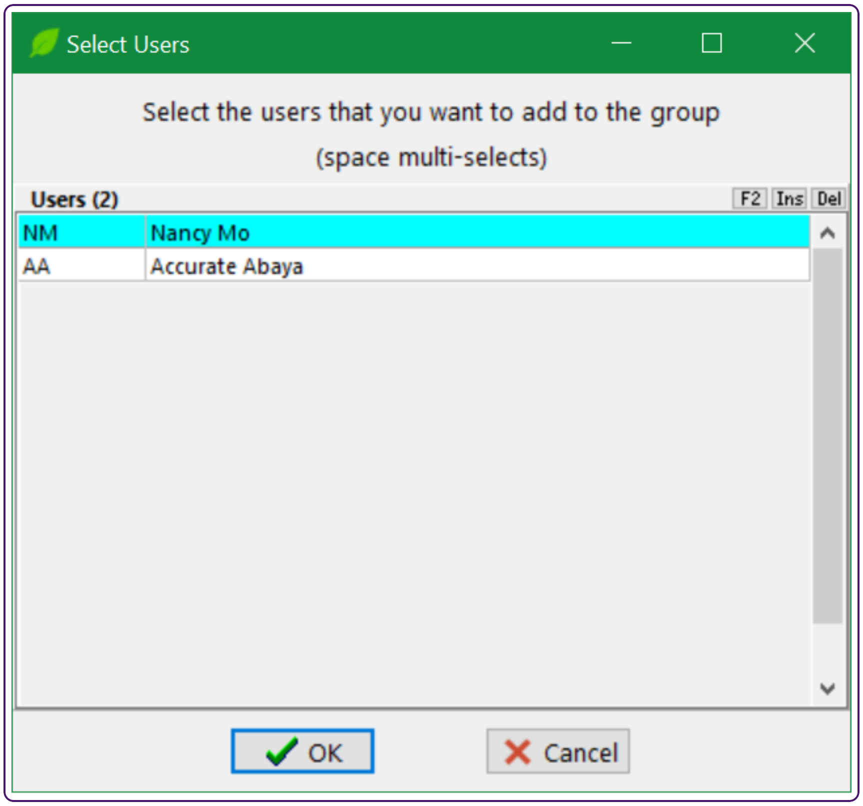
2. Select the **User Groups** tab and select **Ins**.

   The **User Group Edit Form** is displayed.

3. Enter a **Group Name** and **Privilege Level**.

4. To add users to the group:
   - Select **Ins**, then select the user(s) you want to add to the group.



   - To add multiple users, select each user name and press the space bar.

     The selected users' names appear in bold text.
   - Select **OK**.

     The selected users are added to the **User Group Edit Form**.
   - Select **Save**.

Editing a user group

1. From the **Edit Users and User Groups** window, select the **User Groups** tab.
2. Select the **User Group** you want to edit, then select F2.

   The **User Group Edit Form** is displayed.
3. Make the necessary changes and select **Save**.

Deleting a user group

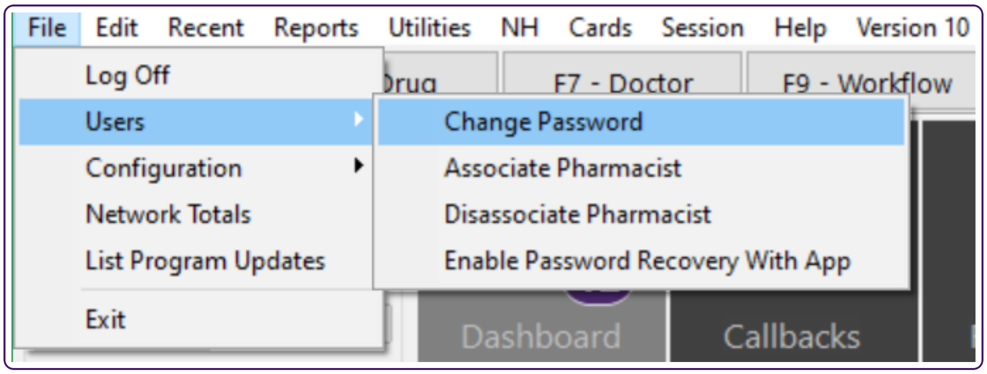
You must remove all users from a user group before you can delete it.

1. From the **Edit Users and User Groups** window, select the **User Groups** tab.
2. Select the user group you want to delete, then select **Del**.

   A prompt appears, asking if you are sure you want to delete the user group.
3. Select **Yes**.

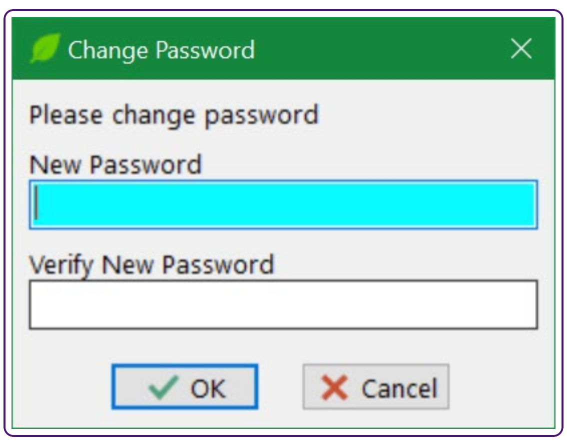
Changing user passwords

1. From the **Alt-X Start** window, select **File** > **Users** > **Change Password**.

2. Enter your login credentials and select **OK**.

   The **Change Password** pop-up is displayed.

3. Enter your new password in the **New Password** and **Verify New Password** fields, then select **OK**.

Chapter 4

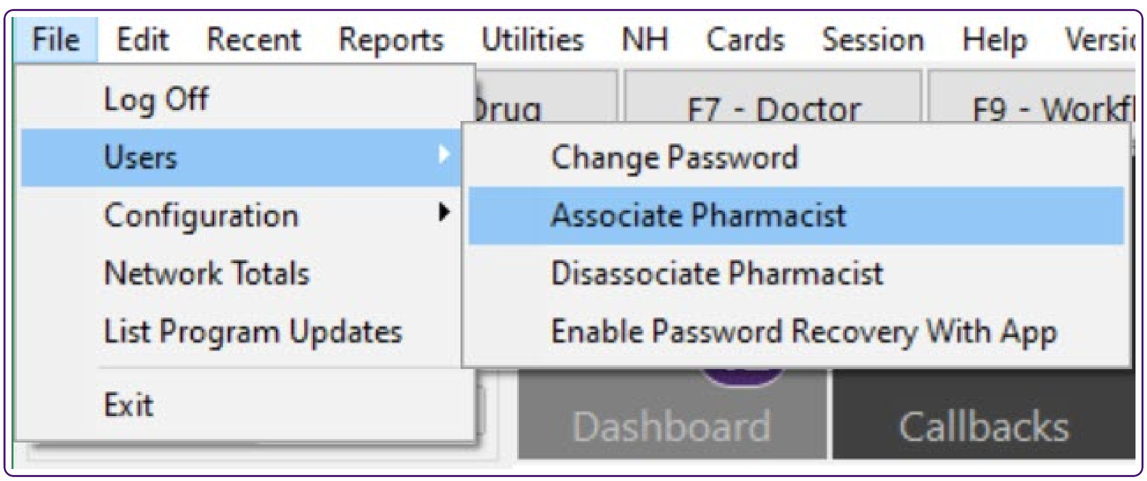
Pharmacist and assistant association

Assistants working within the dispensary must be associated with a pharmacist so that the pharmacist's license number is included when:

- processing prescriptions,
- retrieving information from the Drug Information System (DIS), and
- submitting third-party payer claims

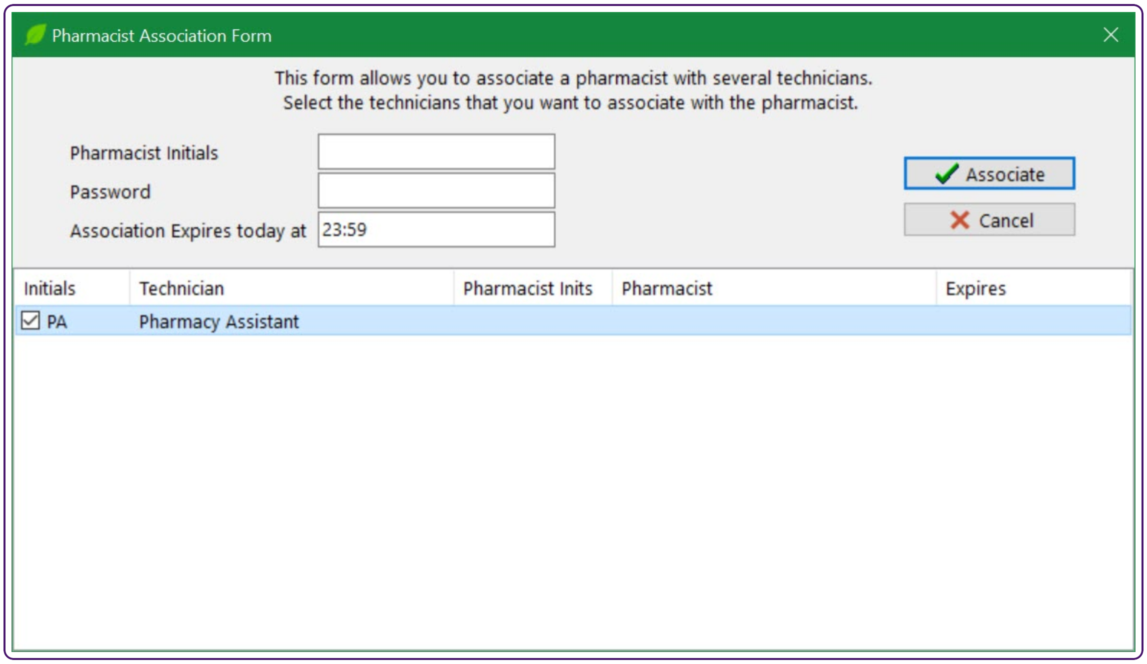
Associating assistants with pharmacists

1. From the **Alt-X Start** window, select **File** > **Users** > **Associate Pharmacist**.



The **Pharmacist Association Form** is displayed.

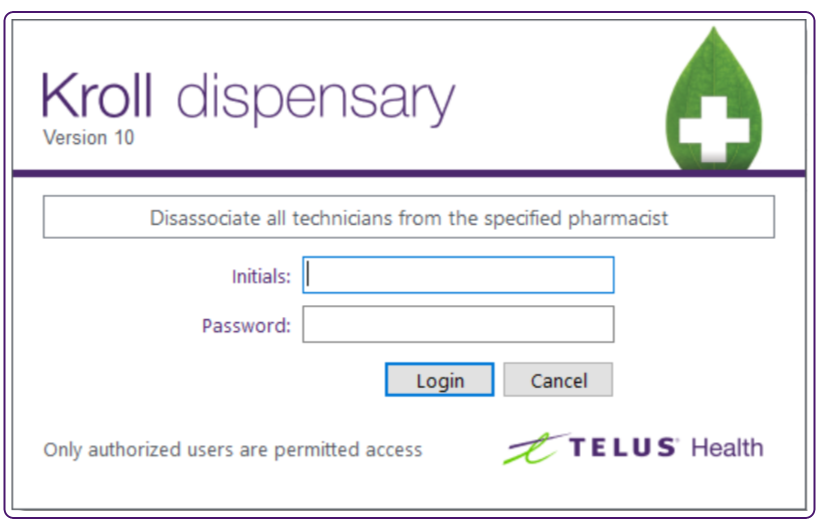
2. Select the assistant(s) you want to associate.



3. Have the pharmacist enter their credentials in the **Pharmacist Initials** and **Password** fields.
4. Select **Associate**.

Disassociating assistants from pharmacists

1. From the **Alt-X Start** window, select **File** > **Users** > **Disassociate Pharmacist**.



2. Have the pharmacist enter his or her login credentials and click **Login**.

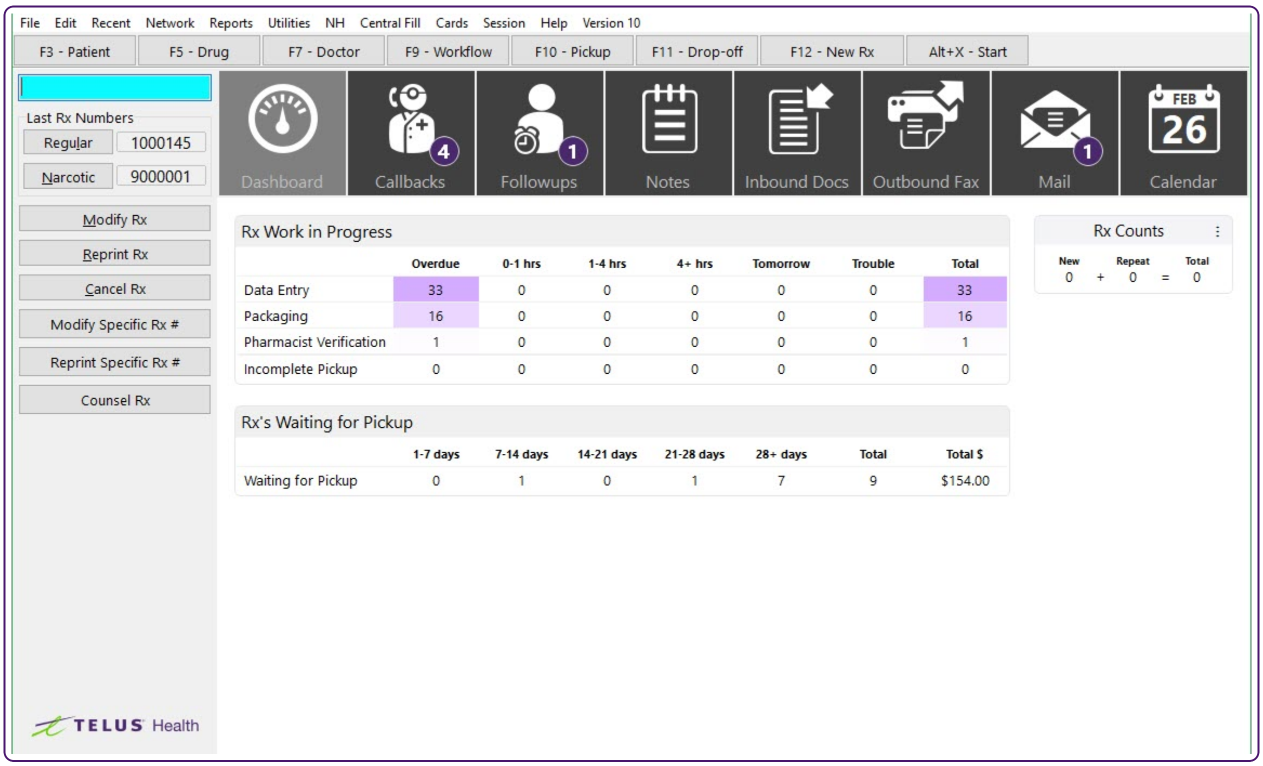
   All assistants are disassociated from the specified pharmacist.

Chapter 5

Start window

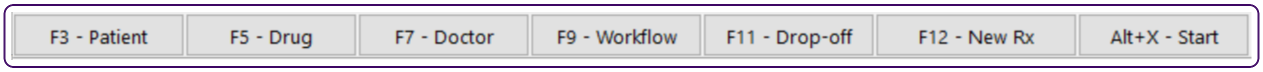
The Start window is displayed when you log into a Kroll session.

> You can open multiple sessions from the same terminal. It is recommended that you do not exceed three sessions per terminal, to avoid slow processing times.



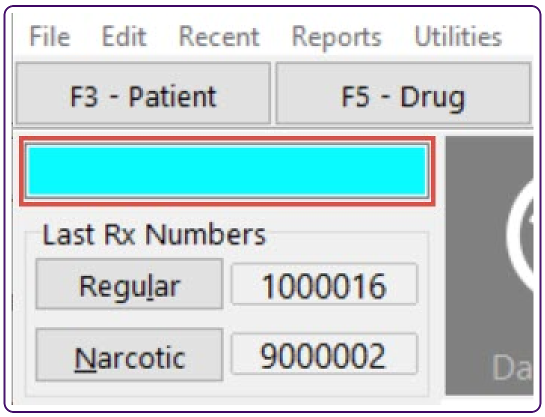
Function keys

The Function Keys (i.e. F3, F5, F7, F9, F11, and F12) are located directly below the menu options. These keys are explained in detail in later sections of this user manual.

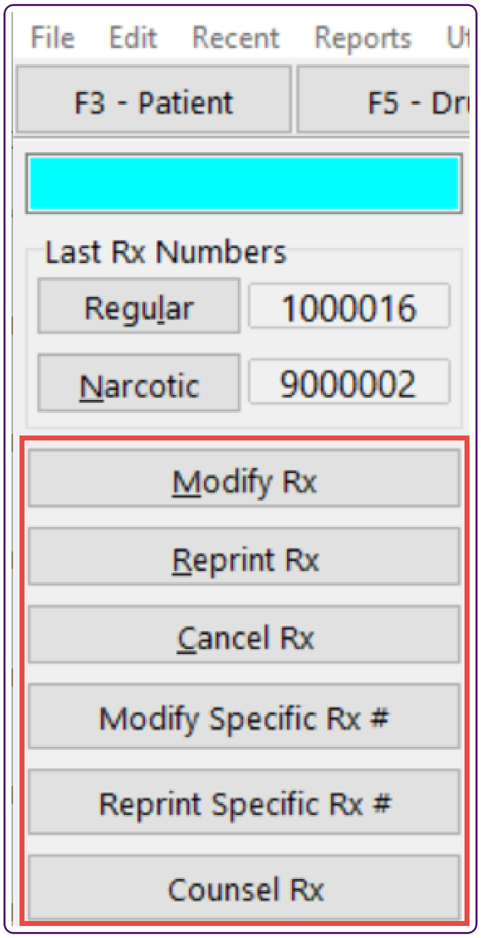


Universal Search Field

The Universal Search Field is used to search for patients, drugs, prescribers, and prescriptions. It is located beneath the **F3 - Patient** button in the upper left corner of the **ALT+X Start** window.



In this field, you can enter search criteria for a patient, drug, prescriber, or Rx, and press the corresponding function key to obtain search results that match the criteria you entered. For example, you could enter a patient's phone number and select **F3 - Patient** to search for a patient, or enter a DIN and select **F5 - Drug** to search for the associated drug record.

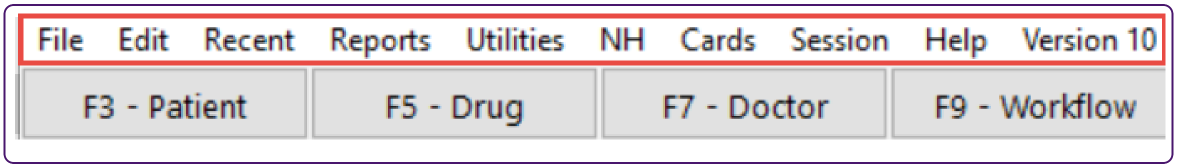


You can also enter a prescription number (Rx) or transaction number (Tx) into the Universal Search Field and choose one of the options from the left navigation pane.

Name	Select to...
Modify Rx	Modify the most recent Tx in the Prescription Chain without generating a new transaction number when possible (e.g. Add missing repeats to a prescription).
Reprint Rx	Reprint vial labels, hardcopies, Kroll Care, privacy labels, and receipts for the most recent Tx in the Prescription Chain.
Cancel Rx	Reverse a prescription.
Modify Specific Rx #	Modify a Tx that is not the most recent Tx in the prescription chain.
Reprint Specific Rx #	Reprint vial labels, hardcopies, Kroll Care, privacy labels, and receipts for an Rx that is not the most recent Tx in the prescription chain.
Counsel Rx	Display the Counseling window for the Rx number entered in the search field.

Menu options

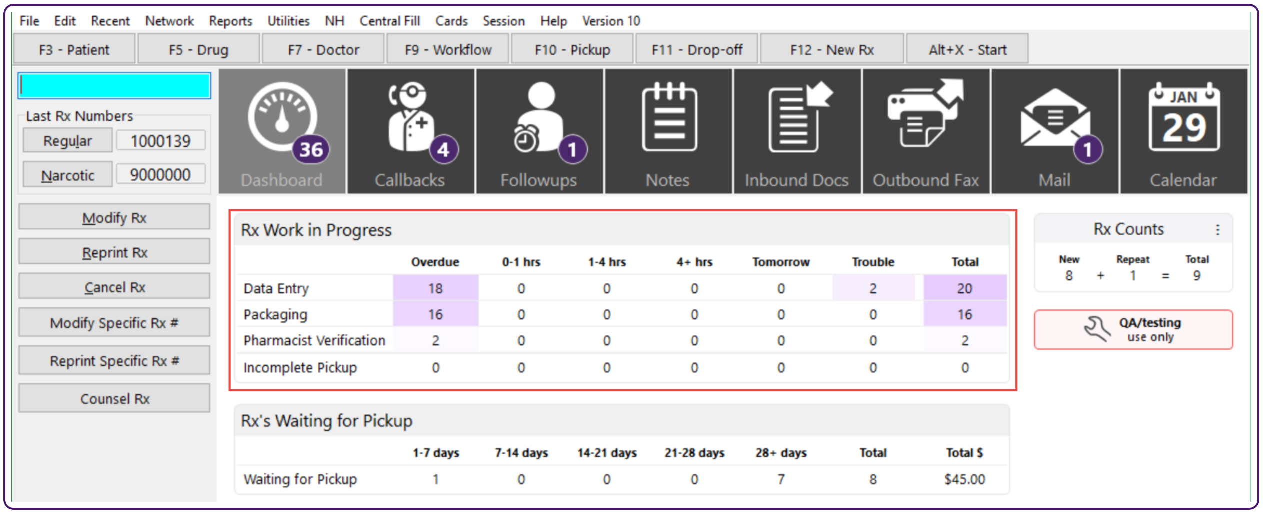
The menu options contain a hierarchy of items you can select.



Name	Description
File and Edit	Contains commands used for configuring and managing the Kroll Pharmacy software. Since a large majority of system configurations are centrally maintained, only a small subset of users have to access these two options.
Reports	Contains a comprehensive list of Kroll reports.
Utilities	Contains supplementary system features, including Drug Ordering, Interactions Checking, Patient Merge, Drug Merge, Quick Price, and Print Free Form Labels.
NH	Contains commands to create new nursing home forms, edit the existing nursing home forms, print MAR/TMR reports, fill manual batches, package, view cycles, and add Rxs to a manual batch.
Cards	Displays the functions also represented by the function keys (i.e. F3, F5, F7, F9, F11, and F12). Selecting one of the commands in this hierarchy is equivalent to pressing the associated function key.
Session	Links to Kroll sessions. Select a link to open and manage multiple Kroll sessions from one terminal.
Help	Contains links to the on-window help and diagnostic tools.
Version 10	Displays contact information for the Kroll support team, version, release date, last FDB or Vigilance update, and current formulary dates.

Dashboard

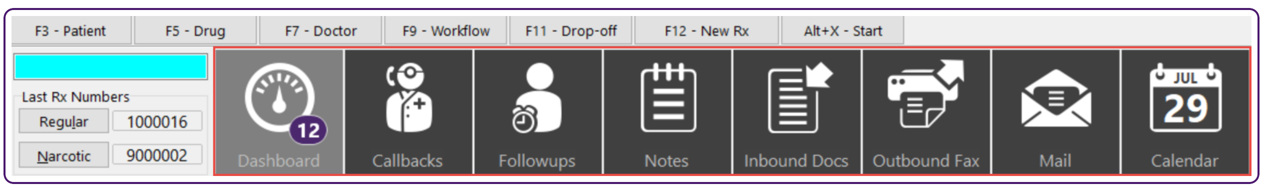
The Dashboard is the default view for the **Alt-X Start** window. It displays prescriptions that are overdue, approaching due time, or in the Trouble queue.



The workflow window allows users to quickly determine the number of Rxs approaching due time at each of the prescription processing stages.

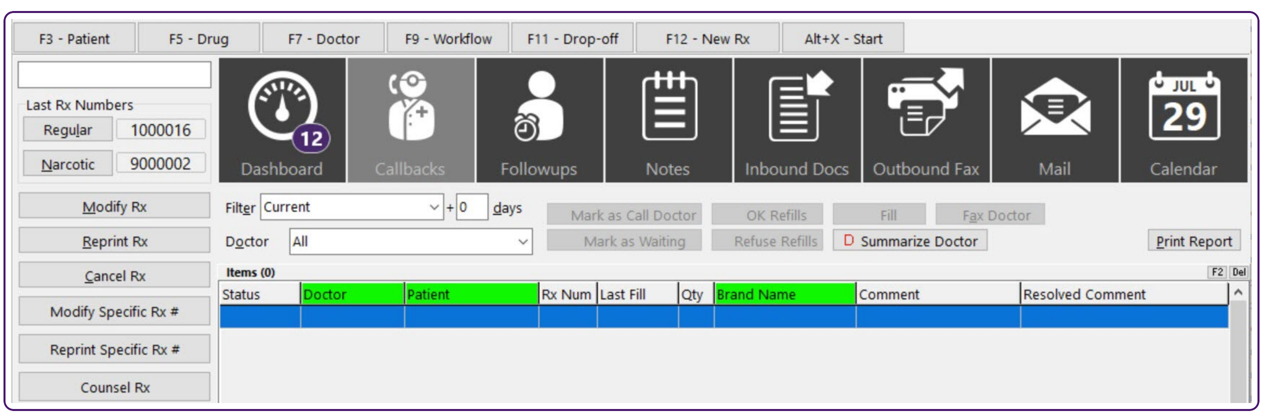
Dashboard buttons

The buttons on the **Alt-X Start** window provide access to tools that support pharmacy operations. The numbers in the purple circles identify the number of entries of each type.



Callbacks

The **Callbacks** button displays communications initiated from the system and sent to prescribers.



An entry is automatically created in the callback list when the **Add to Doctor Callbacks** command is selected from the **Extra Functions** menu in the patient profile.

The following table describes the filters on this list.

Name	Description
Filter	Filter the list for callback entries generated during a specific a date range: ▪ Current + [x] days: Entries that are currently active as well as those that are scheduled to become active “x” number of days. ▪ Current Or Resolved Today + [x] days: Entries that are either currently active or that have been resolved today. ▪ All + [x] days: All entries, historical and current. ▪ History + [x] days: Entries that have been resolved for “x” number of days.
Doctor	Filter the list for callback entries generated for a specific provider.

You can manage the status of a callback entry by highlighting an entry and selecting one of the following options:

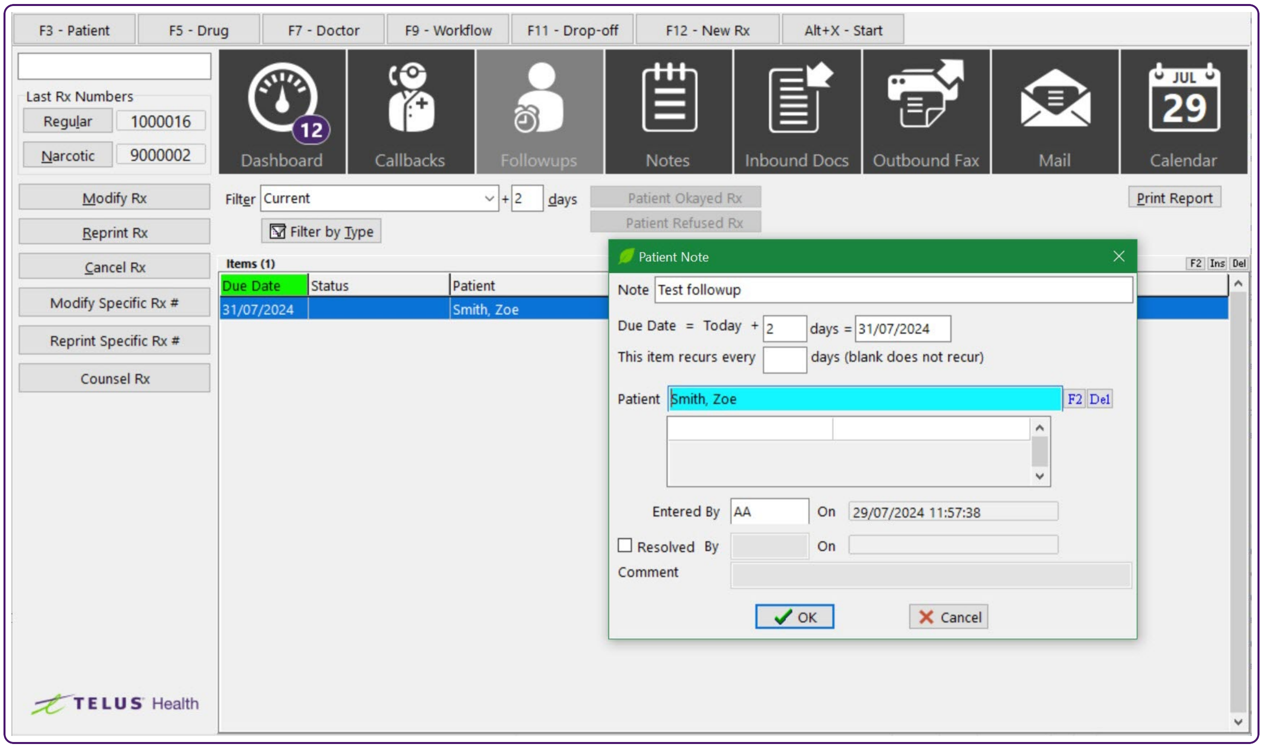
Name	Description
C (Mark as Call Doctor)	Select to indicate that a phone call needs to be made to the doctor for the highlighted entry. You can specify a comment for the doctor callback.
O (OK Refills)	Select to add prescription repeats to an entry. Once repeats have been added, the status of the entry will change to “Doc Okayed”.
F (Fill)	This option is only available for callback entries with a status of “Doc Okayed”. When this option is selected, the following choices are displayed: ▪ Copying the entry to a new Rx number will create a new Rx Work Order ▪ Apply repeats to the existing entry ▪ Ignore changes = do nothing
W (Mark as Waiting)	Select to change the status of a callback entry to “Wait for Doc”.
R (Refuse Refills)	Select this option if the prescriber has declined the pharmacy’s request for repeats on behalf of the patient. The status of the callback entry will change to “Doc Refused”, and an entry will be added to the Follow-ups to remind you to contact the patient to let them know their request for repeats was refused.
D (Summarize Doctor)	Select to display the address, phone number and fax number of the prescriber listed in the callback entry.
Print Report	Select to print the To Do Report, which can be used to identify outstanding and resolved notes, refills, follow-ups, and doctor callbacks.

> Callback entries generated from printing or previewing the ‘Doctor Authorization Report’ are automatically removed from the list when the Rx(s) are refilled using the ‘Copy Rx’ function. The system recognizes that the authorization request has been resolved through the act of copying the old Rx to a new Rx number.

Regular maintenance of the Callback window is essential for ensuring that entries in the list are relevant to pharmacy operations for that day. For example, entries that have been resolved or have become irrelevant need to be deleted so that only current and active entries are displayed.

Followups

The **Followups** button displays entries that serve as reminders to follow up with patients regarding a specific matter; the actual follow up can be performed via phone call or face-to-face interaction.



The following table describes the filters on this list.

Name	Displays...
Current + [x] days	Entries that are currently active and those that are scheduled to become active in “x” number of days. If set to <Blank>, those entries that are due on the current day are displayed.
All	All entries, both historical and current.
History + [x]days	Entries that have been resolved “x” number of days ago.

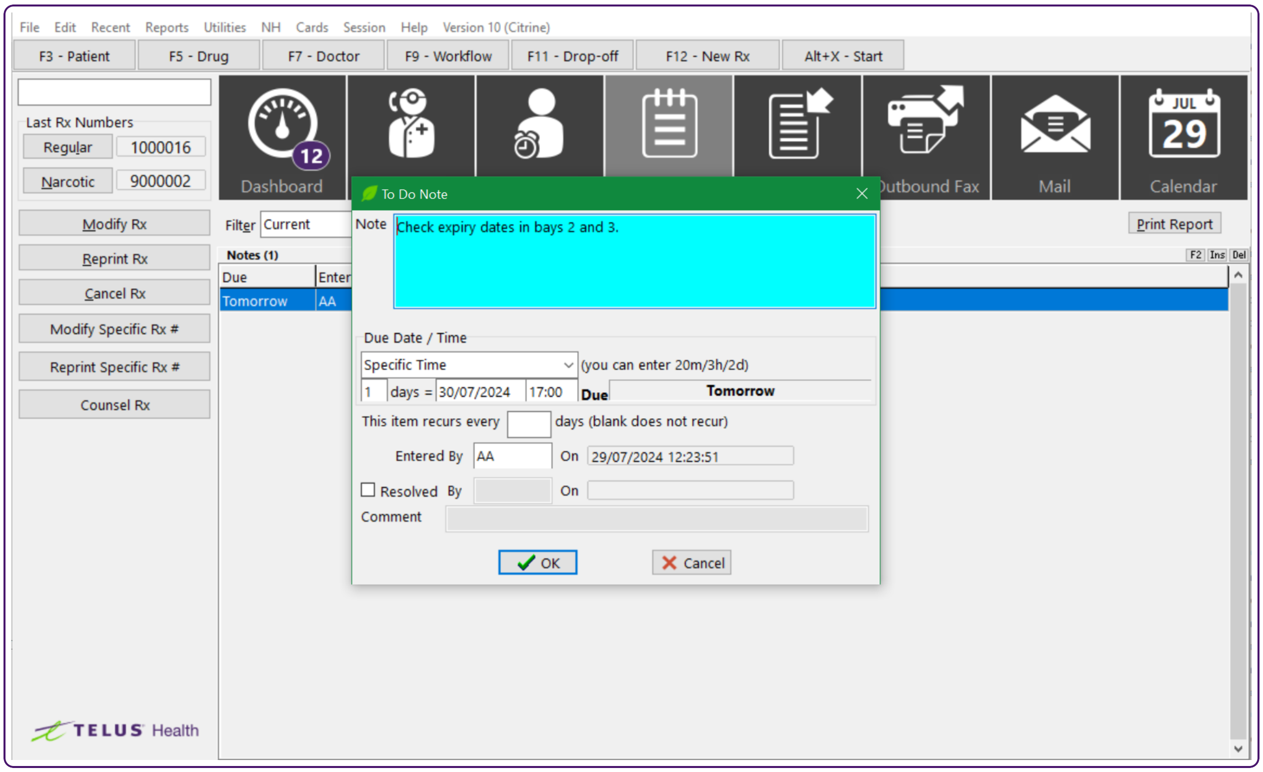
You can manually add a follow up entry by clicking Ins or pressing Insert and completing the **Patient Note** form. The following table describes the options in this form:

Name	Description
Due Date	When the follow-up is due.
Reoccurring Follow-up	If the follow-up recurs, specify the frequency (**every** x **days**).
Patient	Depending on how the follow-up entry was added, the patient field may or may not be populated. If the patient field is empty, select F2 to search for and insert a patient record into the follow-up entry.
Entered by	Enter your initials to identify the author of the follow-up entry. The initials are defaulted to you, as you initiated the Kroll session, but they can be overwritten.

Name	Description
Resolved by	Enter your initials to confirm a follow-up has been completed. Once a follow-up has been “resolved” it can only be accessed by setting the date range to “History + _days”.
Comment	Details of the patient follow-up. Mark Callback entries as “Doc Refused”. When a prescriber refuses to authorize repeats for a patient, the pharmacy will need to follow-up with the patient so they can make other arrangements to obtain their medication.

Notes

The Notes window is a communication tool pharmacy users use to communicate with each other. The intention is to reduce paper clutter within the dispensary by using a system-supported function that facilitates user-to-user communication. For example, a pharmacist may wish to leave a message for the afternoon assistant indicating that drug expiry checking should be continued to the second and third bay.



Select **Ins** to insert a new note. You can also use the filter to view note entries generated for a specific date range.

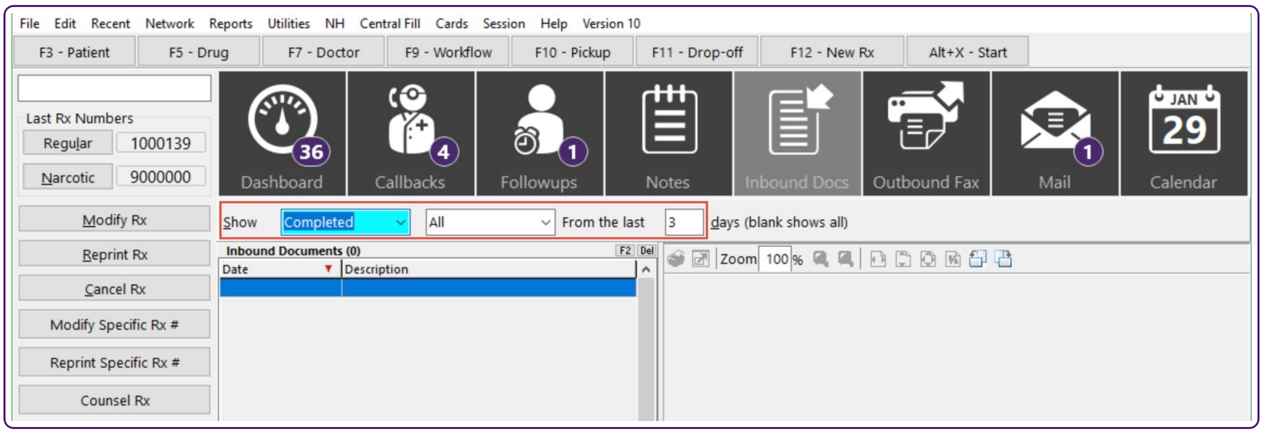
The following table describes the filters on this list.

Name	Displays...
Current + [x] days	Entries that are currently active and those that are scheduled to become active in “x” number of days. If set to <Blank>, those entries that are due on the current day are displayed.
All	All entries, both historical and current.
History + [x]days	Entries that have been resolved “x” number of days ago.

The following table describes the fields on the **To Do Note** pop-up:

Name	Description
Due Date/Time	Select when the note entry becomes active. Active notes contribute to the running count on the **Notes** window.
Reoccurring Notes	If the note recurs, specify the frequency (**every** x **days**).
Entered by	Enter your initials to identify the author of the follow-up entry. The initials are defaulted to you, as you initiated the Kroll session, but they can be overwritten.
Resolved by	Enter your initials to confirm a follow-up has been completed. Once a follow-up has been “resolved” it can only be accessed by setting the date range to “History + _days”.
Comment	Enter any responses or general comments.

Inbound Docs

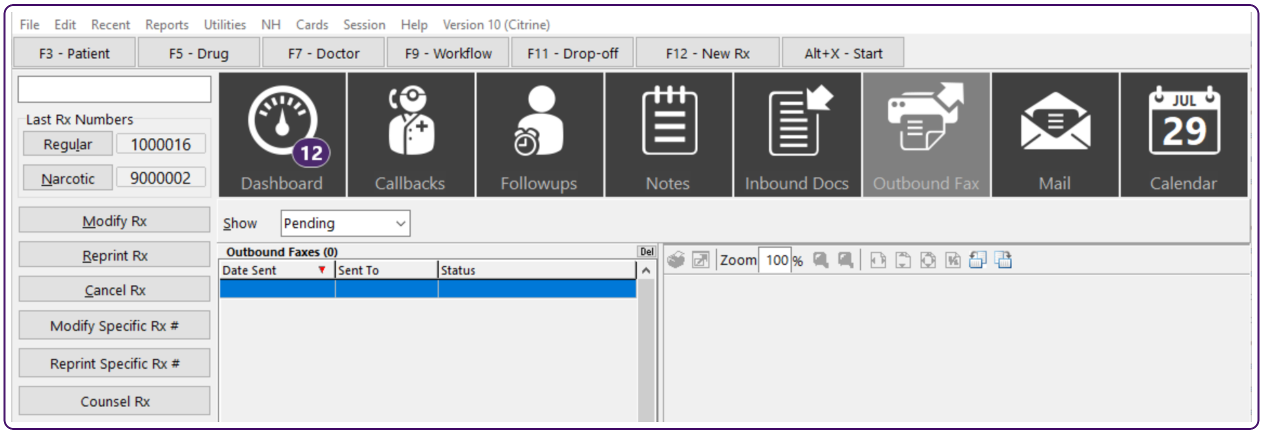


The **Inbound Docs** window displays images that have been scanned into the system via the document scanner or received via the fax or email. From the scan window, users can filter the **Inbound Documents** list by selecting Pending, Completed, or Deleted and Network Scan, Inbound Fax, or All from the Show menus. Use the From the last [x] days field to specify a date range.

For more information on this functionality, see the *Sending and Receiving Faxes User Guide*.

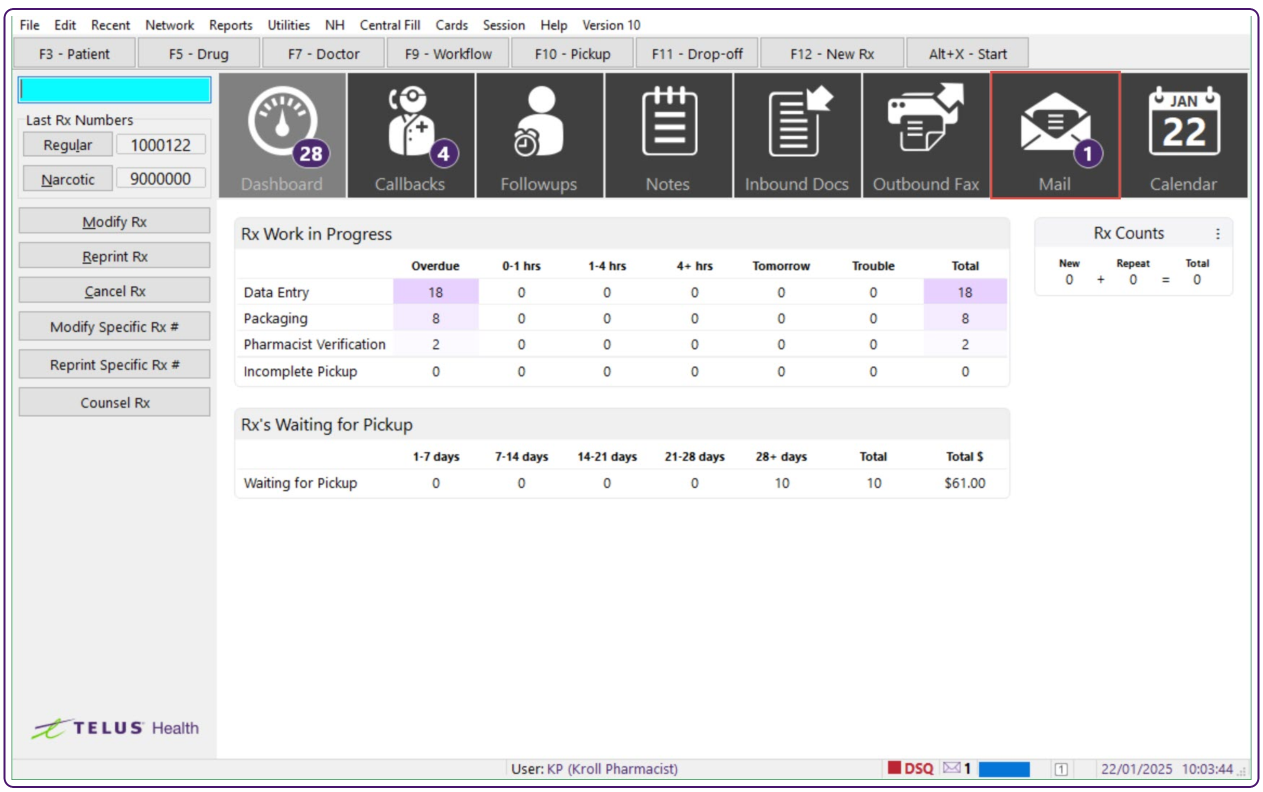
Outbound Fax

The **Outbound Fax** window is used for sending fax messages such as Prescription Authorization Requests and Rx Transfer Requests.

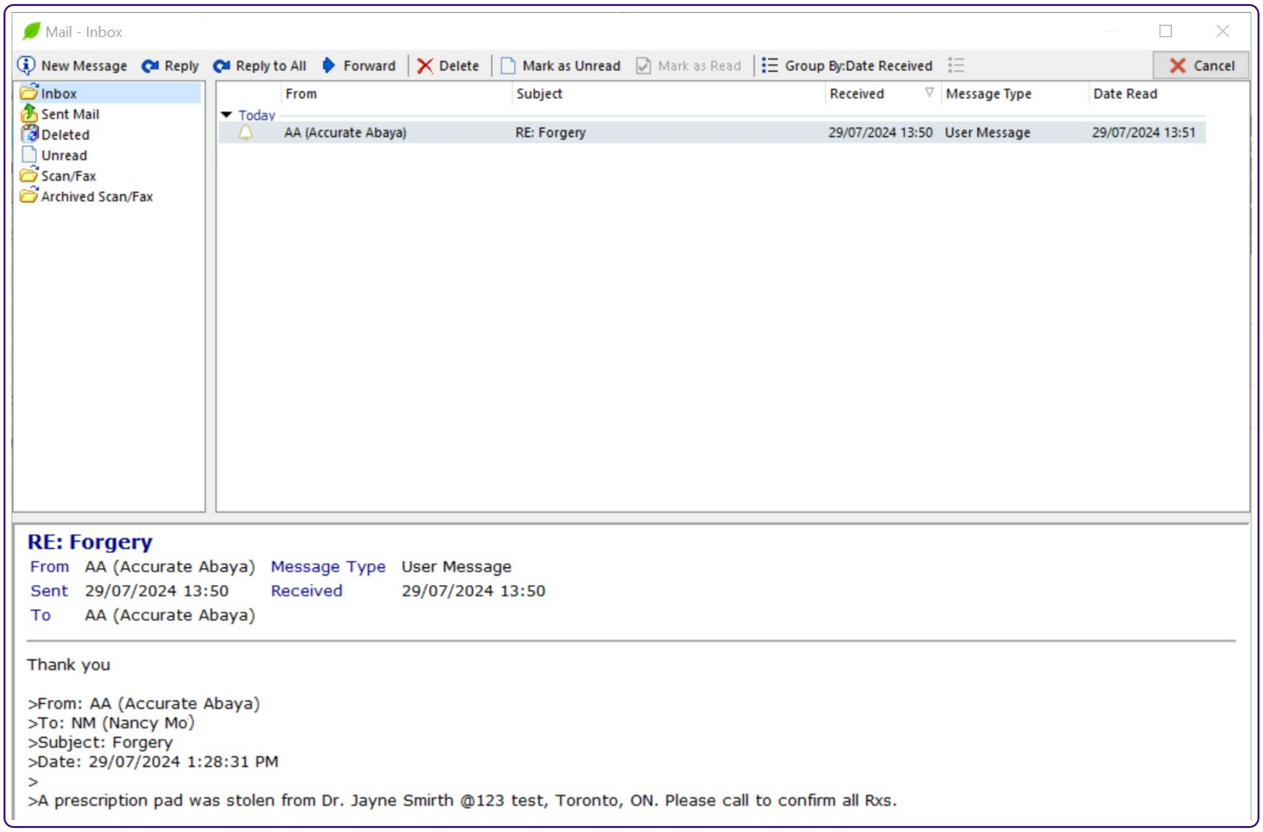


Mail

The **Mail** button launches an internal email system built within the Kroll Pharmacy software. The head office can use this tool to send "fan out" messages to pharmacy users for various communications such as provincial network broadcasts. All users set up in Kroll can send messages to other local system users.



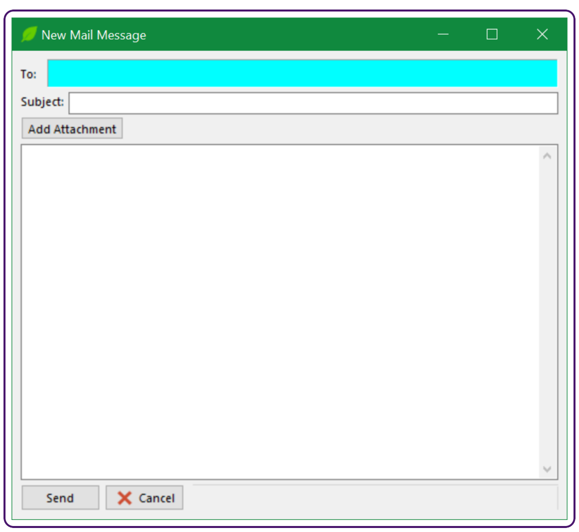
The number beside the mail icon identifies the number of unread messages you have. Select the mail icon or the envelope at the bottom of the window to access your inbox. Select a message to view it.



To compose a new message:

1. From the upper left hand corner of the **Mail** window, select **New Message**.

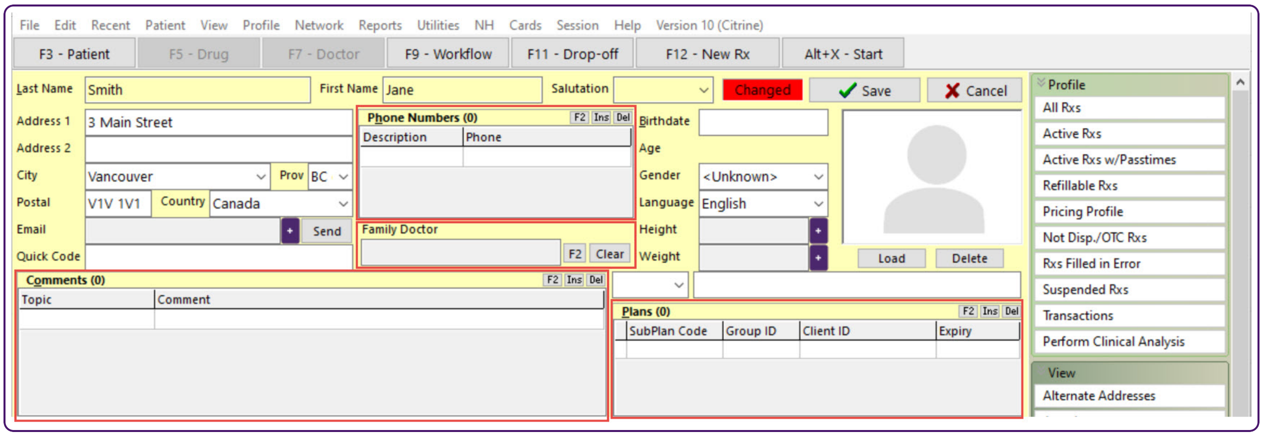
   The **New Mail Message** window is displayed.



2. In the **To** field, enter the recipient's name.
3. In the Subject field, enter the subject.
4. Optionally select the **Add Attachment** button and attach an image or document.
5. Select **Send**.

Table buttons

There are numerous areas within the Kroll application where a table of records is displayed beneath **F2**, **Ins**, and **Del** buttons. For example, there are three instances in the upper portion of the patient record.



The **F2** button is also occasionally used alone or alongside the **Clear** button.

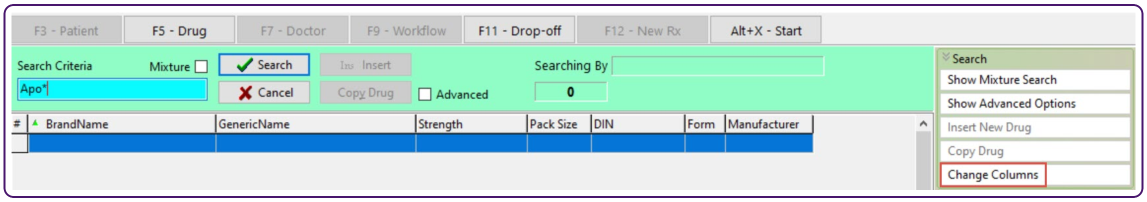
The following table describes the functions of these four buttons and identifies the keys on your keyboard you can press to trigger the same functions.

Button	Key	Function
Ins	Insert	Add a row to the selected table or to a field.
F2	F2	Edit the selected row in the table.
Del	Delete	Delete the selected row from the table.
Clear	N/A	Deletes a value from a field.

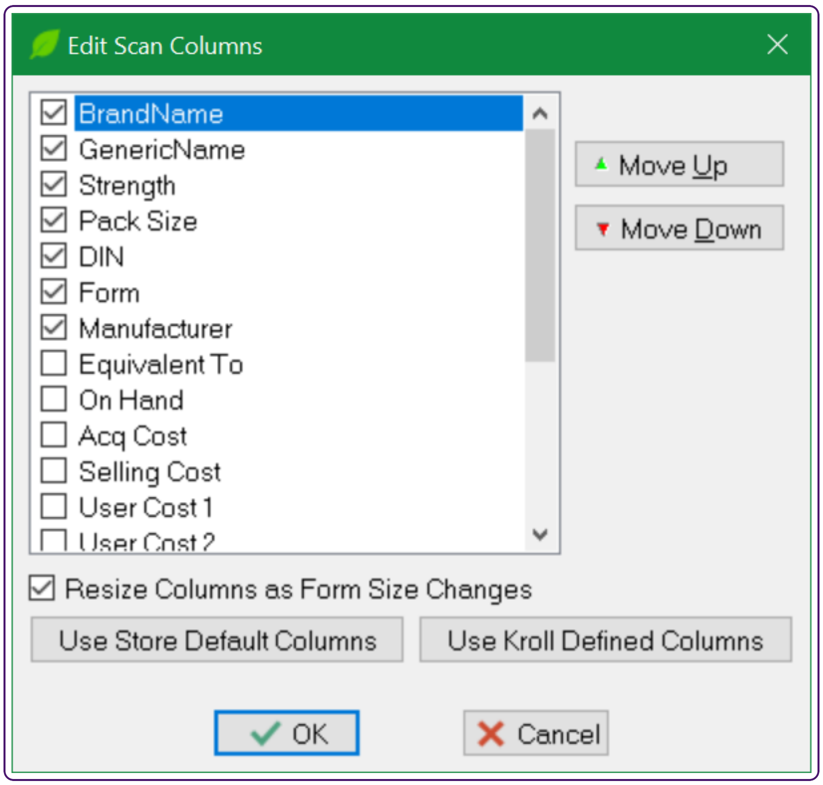
Configuring the columns in search windows

You can configure which columns are displayed in the drug, mixture, and prescriber searches. The appearance of the windows in this procedure vary according to the search you are configuring.

1. Select **Change Columns** from the right navigation pane, or right click a row in the search results and select **Change Columns**.



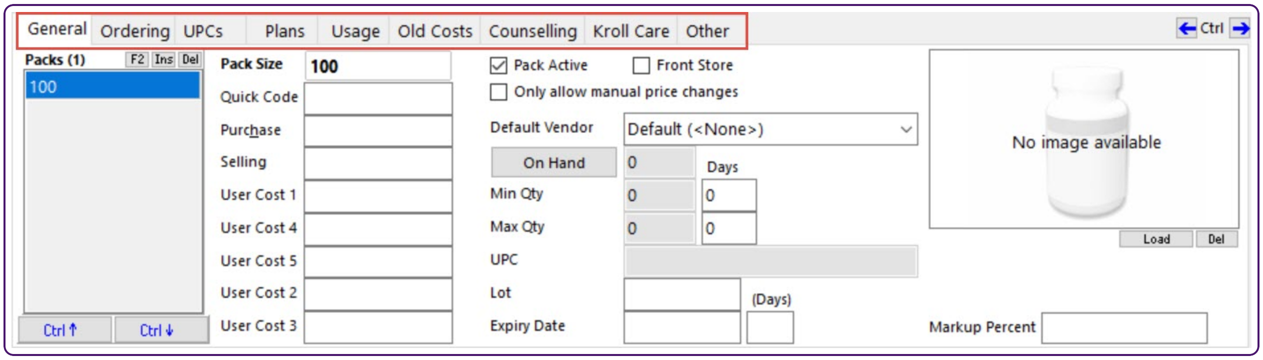
The **Edit Scan Columns** window is displayed.



2. Select the columns you want to display.
3. Optionally use the **Move Up** and **Move Down** buttons to resequence the columns.
4. To restore the default columns, select **Use Store Default Columns** or **Use Kroll Defined Columns**.
5. Select **OK**.

Navigating tabs

The drug and mixture records contain a series of tabs. To from tab to tab, press CTRL+→ to move right or CTRL+← to move left.



Chapter 6

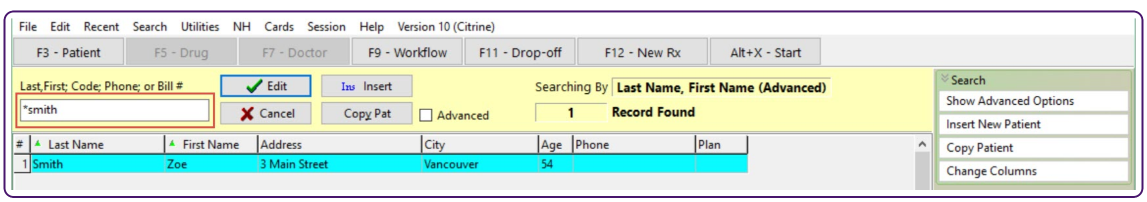
Patient records

Patient records contain comprehensive information about patients' contact details, drug plans, allergies and conditions, and Rx history. This section explains how to perform patient searches and how to create and manage patient records.

Searching for a patient

Method 1: From the F3 - Patient Search window

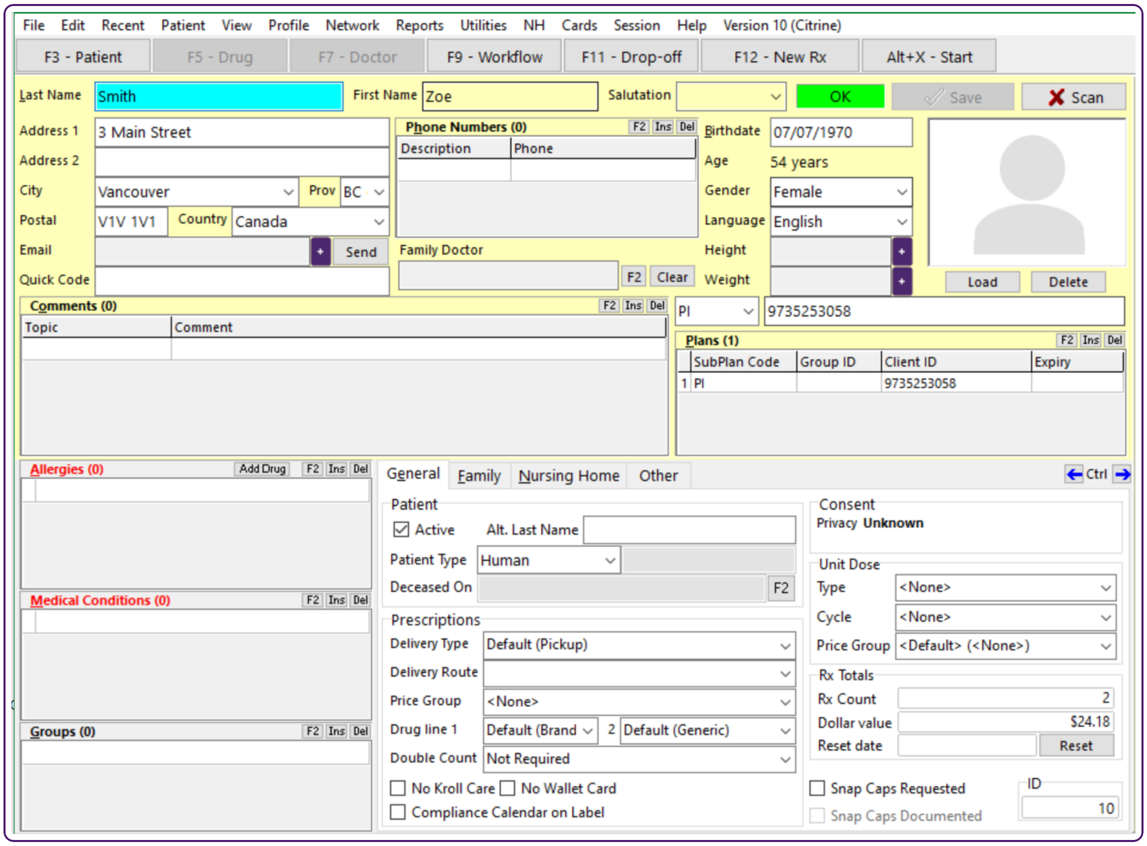
1. From the **Alt-X Start** window, select **F3 - Patient**.



2. Enter one of the following patient search criteria:
   - **Last Name**, **First Name** (e.g. "Doe, Jane" OR "doe,j" OR "Doe" OR ",Jane").
   - A period (.) and the **Patient Quick Code** (e.g. ".DoeJ").
   - 7 or 10-digit phone number (e.g. 800-263-5876 or 263-5876).
   - A number sign (#) and the +Third Party Billing number (e.g. #123456789).
   - An asterisk (*) to search ALL patients in the database.
3. Select **Search**.

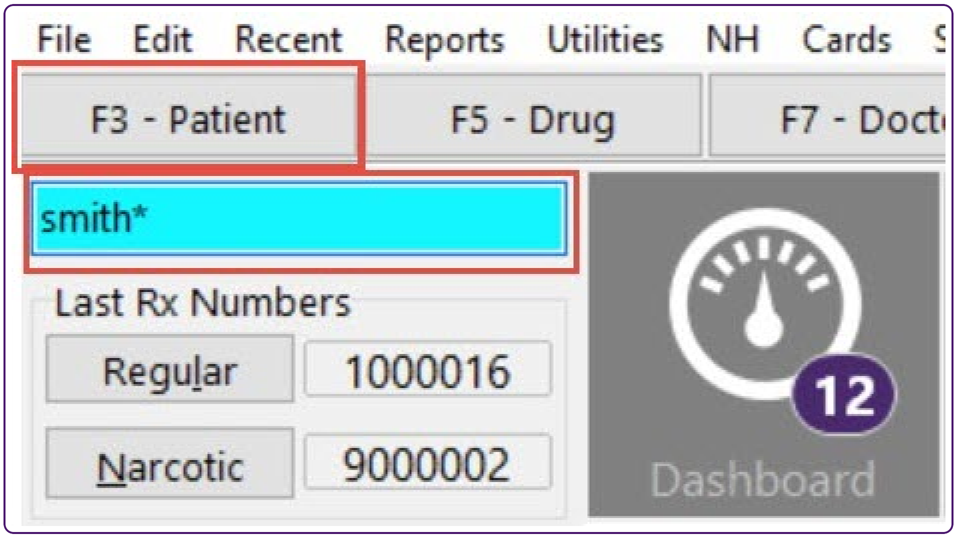
4. Double-click the patient record.

   The **F3 - Patient window** is displayed.



Method 2: From the Alt - X Start window

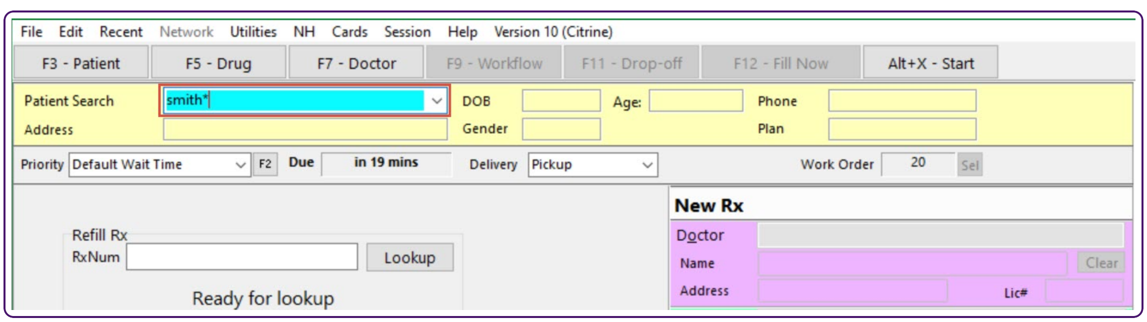
1. Enter any of the search criteria described above in the **Universal Search Field** and click **F3 - Patient**.



If more than one patient record matches the search criteria, select the patient from the list of matching patients to display the **F3 - Patient** window for that patient. Otherwise, the **F3 - Patient** window is displayed automatically.

Method 3: From the F11 - Drop-Off window

1. From the **F11 - Drop-Off** window, enter your search criteria in the **Patient Search** field and press Enter.



The list of matching patients is displayed.

2. Double-click the applicable patient record.

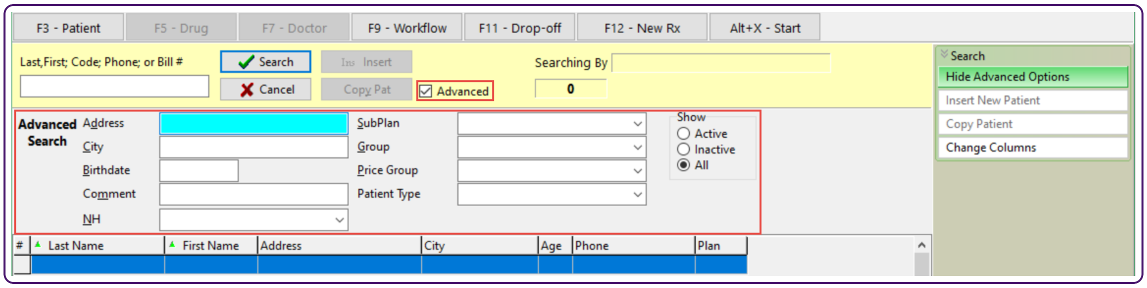
The **F3 - Patient** window is displayed.

Performing an Advanced Patient Search

If you cannot find a patient through one of the regular patient searches described in the previous sections, you can use the advanced search.

1. From the **F3 - Patient** window, select **Advanced**.

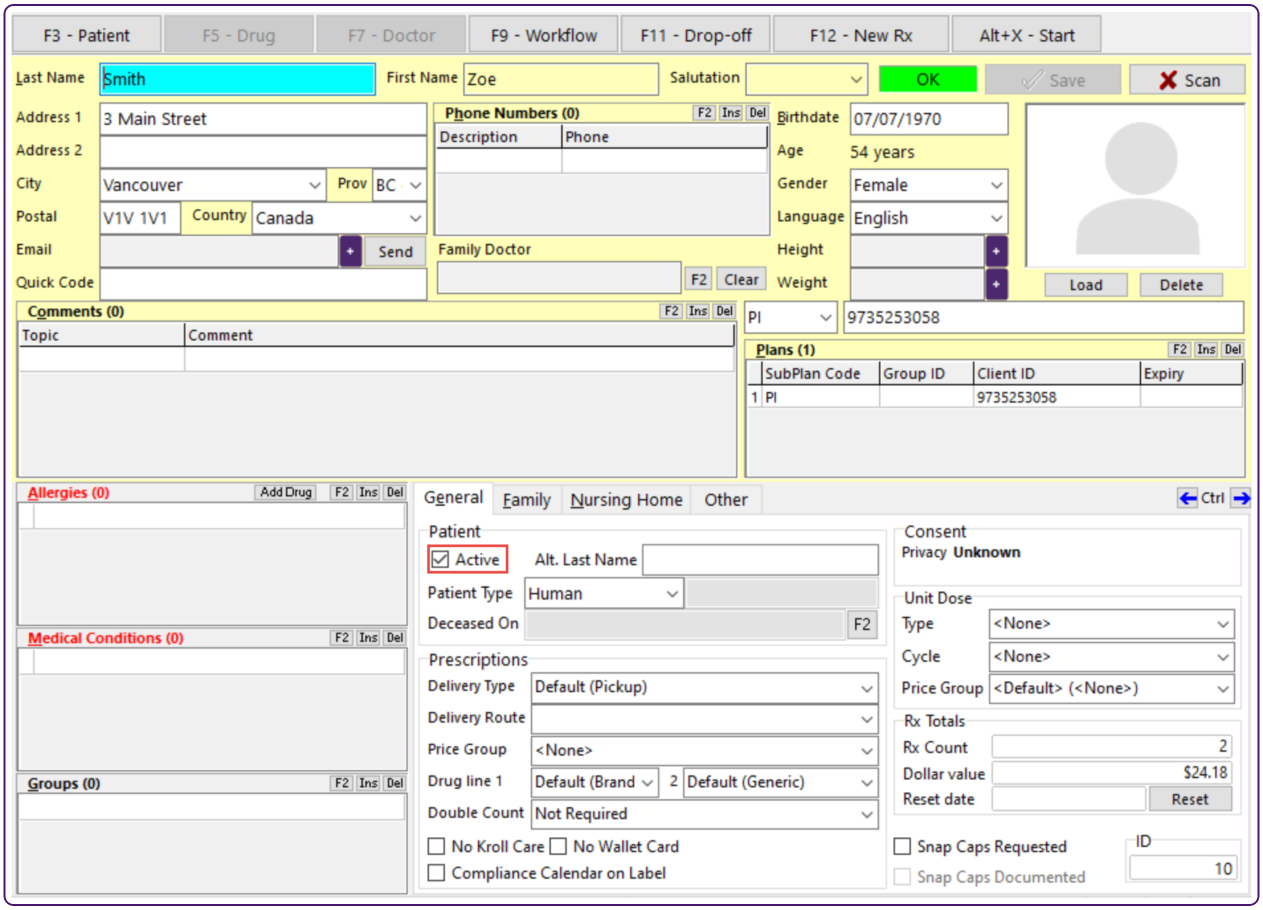
   The **Advanced Search** pane is displayed.



2. Enter the advanced patient search criteria and click **Search**.

Inactive patient records

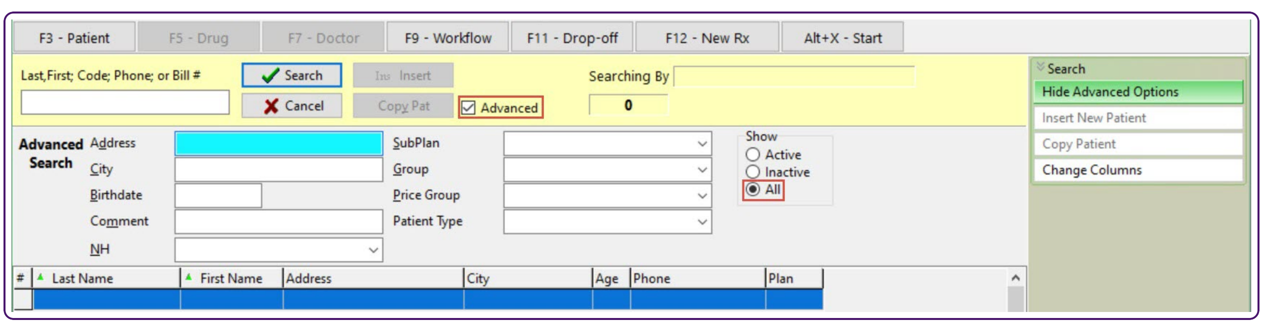
To inactivate a patient record, deselect its **Active** checkbox. Inactive patients do not show up in the regular patient search, but you can locate them using an **Advanced** search.



Inactive patient records cannot be used in prescriptions. The **Active** checkbox must be selected for prescriptions to be filled for a patient.

There are various reasons you may choose to inactivate a patient record. For example, the patient may have died or moved to another country. Inactivating these records enables the regular search to provide more succinct results; this reduces the chances of selecting the wrong patient record for a prescription.

To locate inactivated patient records in the system, perform an Advanced search. Ensure the **Inactive** checkbox or **All** option is selected.

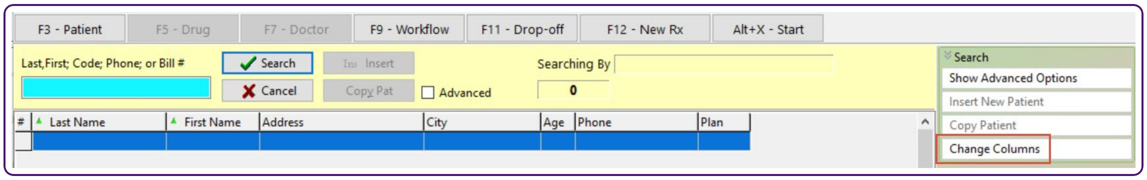


Inactive patient records are displayed in red font in the patient search window.

Configuring columns in the Patient Search window

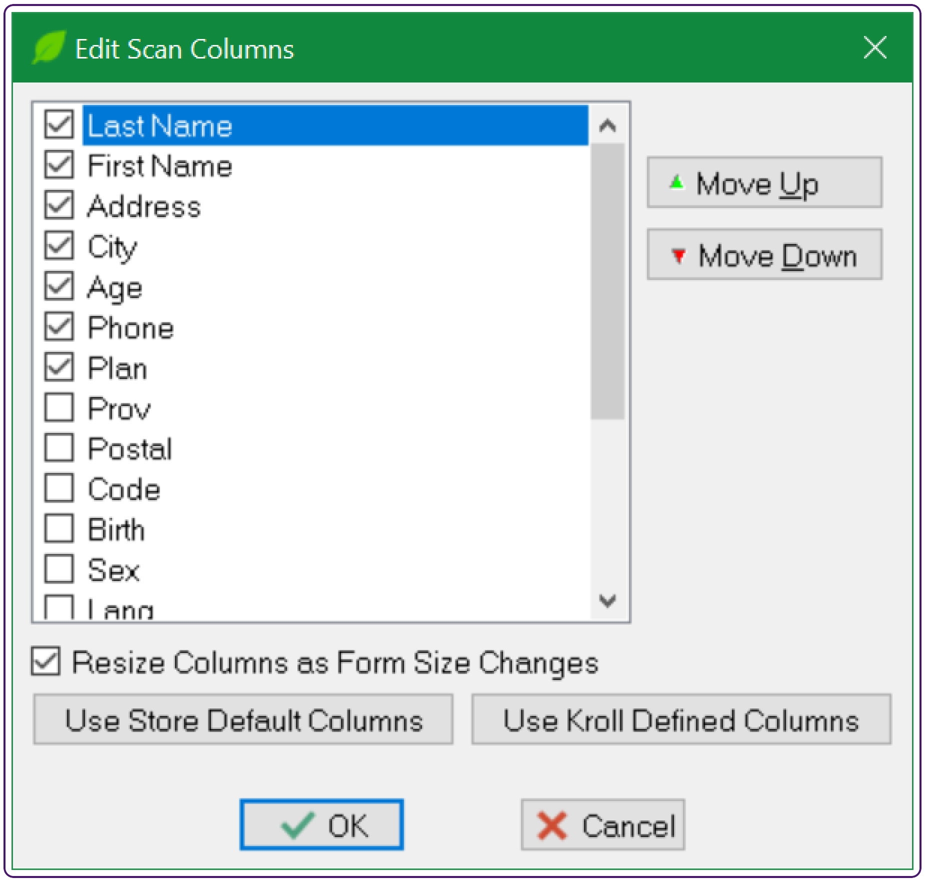
You can change which the columns are displayed in the **Patient Search** window.

1. Select **Change Columns** from the right navigation pane.



The **Edit Scan Columns** window appears.

2. Select the columns you want to be displayed, then select **OK**.



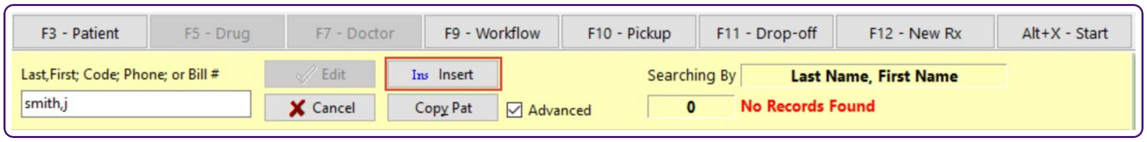
If needed, you can use the **Use Default Columns** button to revert your changes and show the default collection selections.

Creating a patient record

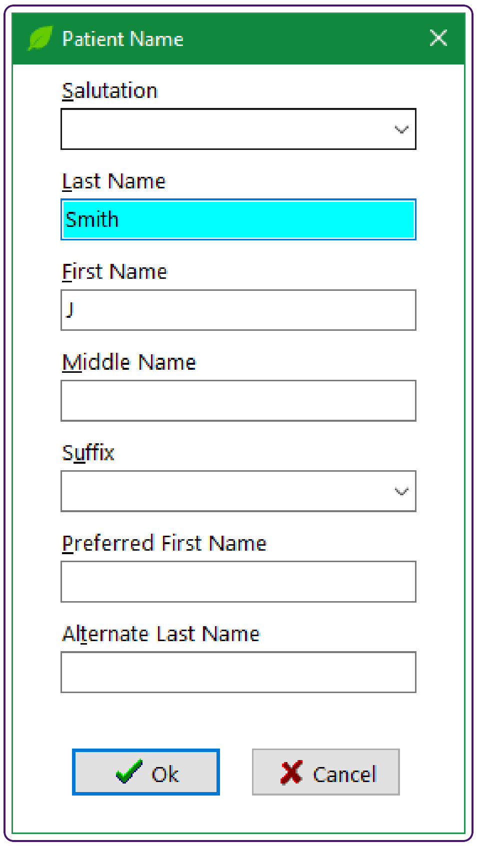
1. Perform a thorough search to ensure the patient does not already exist in the database.

   You are prompted to perform an **Advanced** search for inactive patients.

2. When you have determined that the patient does not exist in the system, select **Ins**.



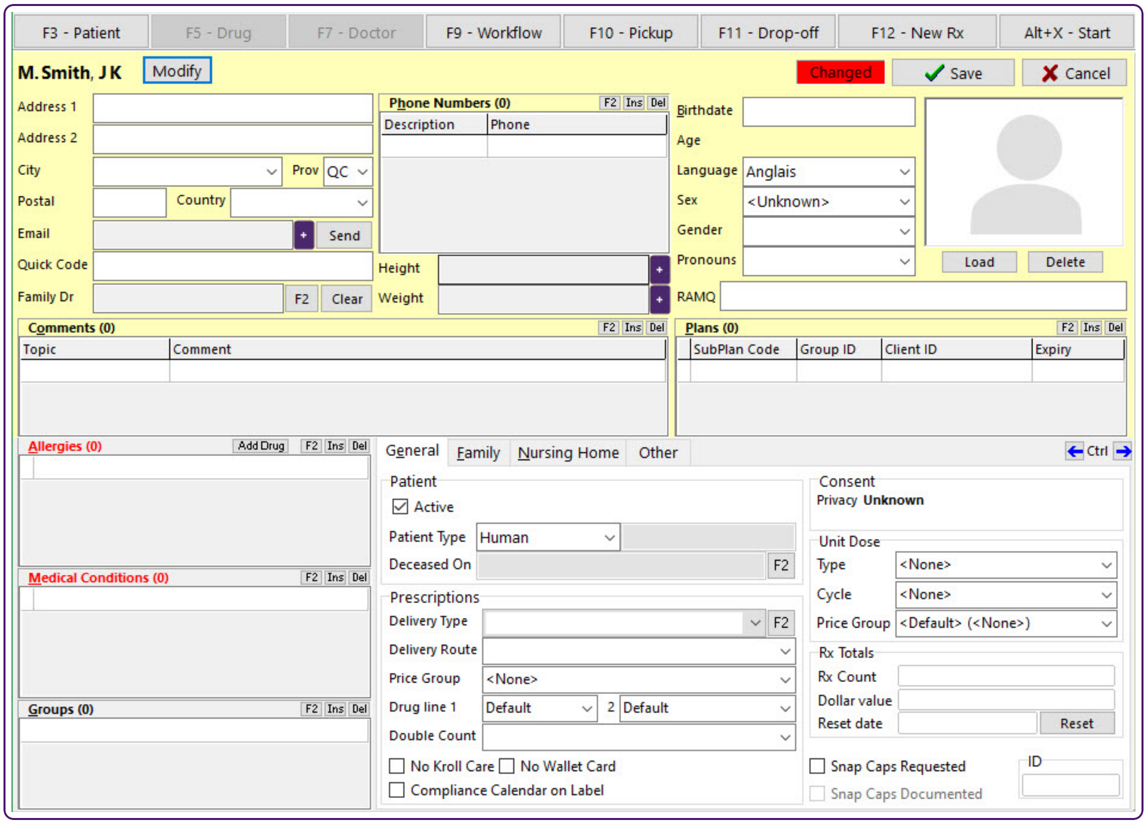
   The **Patient Name** popup is displayed, with the information you entered in the search filled in.



3. Enter the rest of the patient name information, and select **OK**.

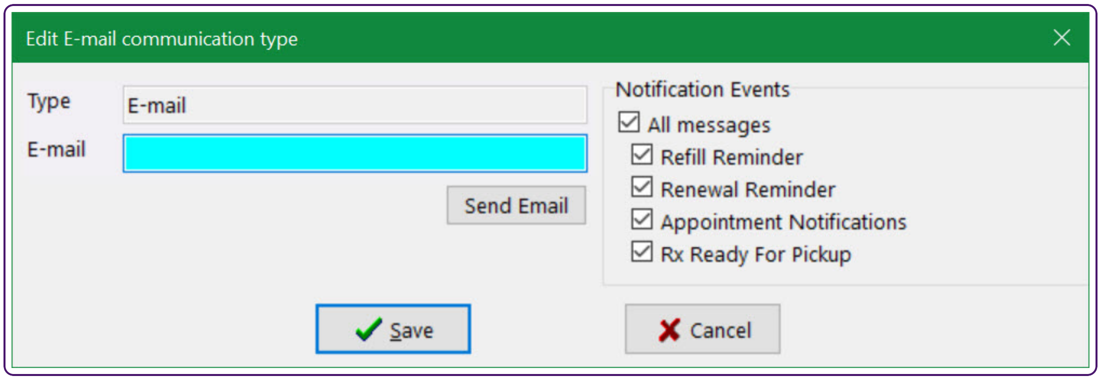
   Do not include any symbols in the name fields.

   A blank **F3 - Patient** window is displayed.



4. In the **Address 1**, **Address 2**, **City**, **Province**, **Postal Code**, and **Country** fields, enter or select the patient's address.

5. To add the patient's email address:
   - Select the + button to the right of the **Email** field to launch the **Edit E-mail communication type** pop-up.

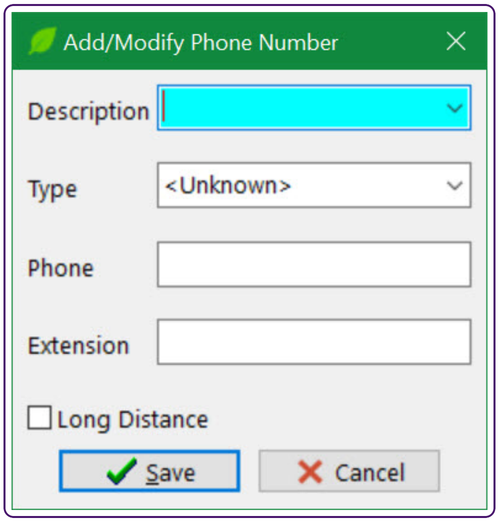


   - In the **E-mail** field, enter the patient's email address.
   - Select the applicable **Notification Events**.
   - To initiate an email message to the address you entered, select **Send Email**. The message is created in your local email application.
   - Select **Save**.
6. Optionally enter a **Quick Code** for the patient.
7. Optionally select the **F2** button to the right of the **Family Dr** and then search for and select the patient's family doctor.

   Be careful of prescriber errors when using this field, as all prescriptions processed for the patient default to this prescriber.

8. To enter a phone number:
   - In the **Phone Numbers** section, select **Ins**.

     The **Add/Modify Phone Number** pop-up is displayed.

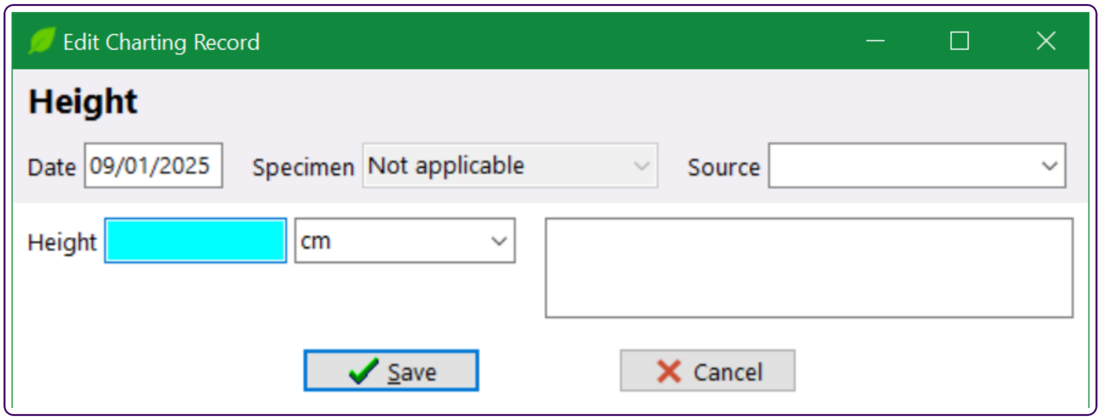
   - Select the **Description** and optionally select the **Type**.
   - Enter the **Phone** number and optionally enter an **Extension**.
   - Select **Save**.
9. Enter the patient's **Birthdate** in the format DDMMYYYY.

   The year can be entered as a 2 or 4 digit number (e.g. 1950 or 50). The system automatically calculates the patient's **Age** in years.
10. Select the patient's **Language** if it is not English.

    Be careful when changing the language setting as this will cause the SIG on the vial label to print in the language selected if the language has been configured in Kroll.

    English translations will appear on the hardcopy for the pharmacist checking the prescription.
11. Select the patient's **Sex** and **Gender**, and optionally select their **Pronouns**.

12. Optionally enter the patient's height and weight:
    - Select the + button to the right of the **Height** or **Weight** field to display the **Edit Charting Record** popup:

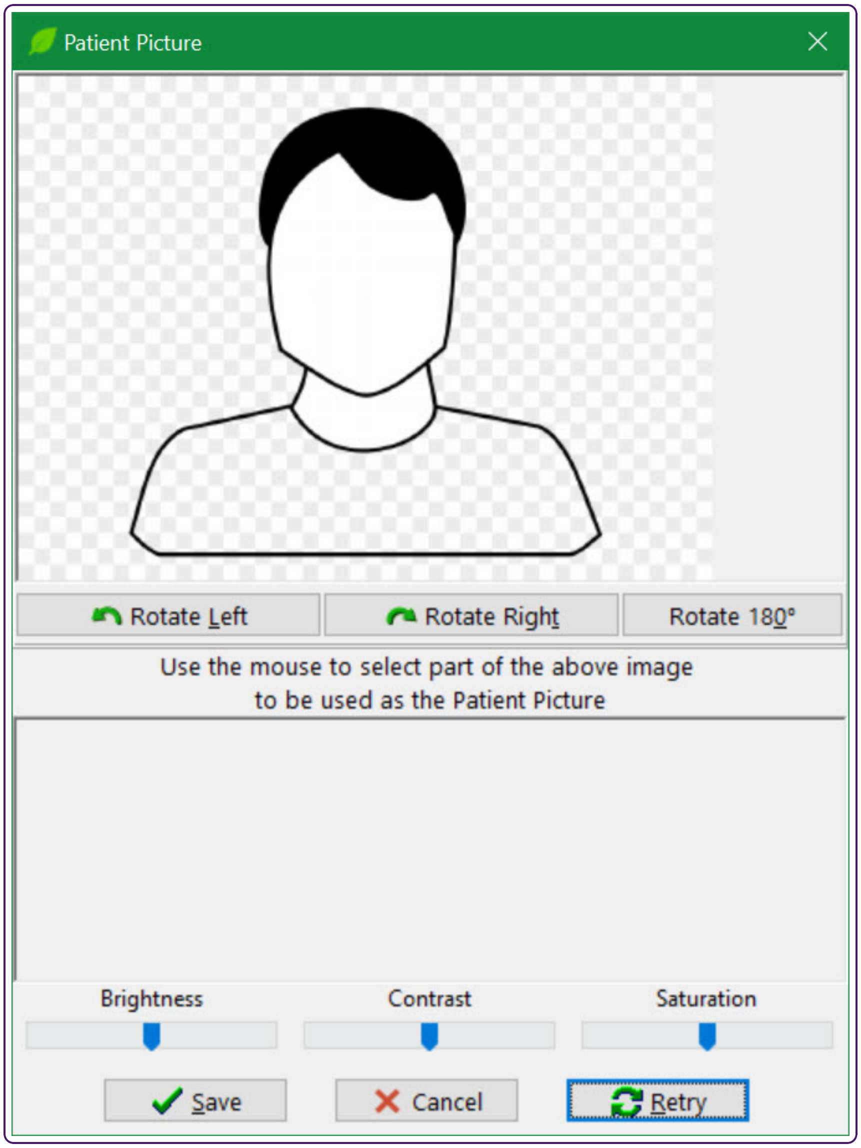


    - Optionally select the **Source**.
    - Enter the **Height**, choose the measurement, and optionally enter a comment.

      Use the same measurements to record height and weight, to maintain database consistency (i.e. use feet or centimeters for height, and pounds or kilograms for weight).
    - Select **Save**.
13. In the **Provincial Plan** field, enter the patient's provincial health number (i.e. ODB, RAMQ).

14. To load the patient's image using the document scanner:
    - Feed the photo into the scanner, then select **Load** to initiate scanning.

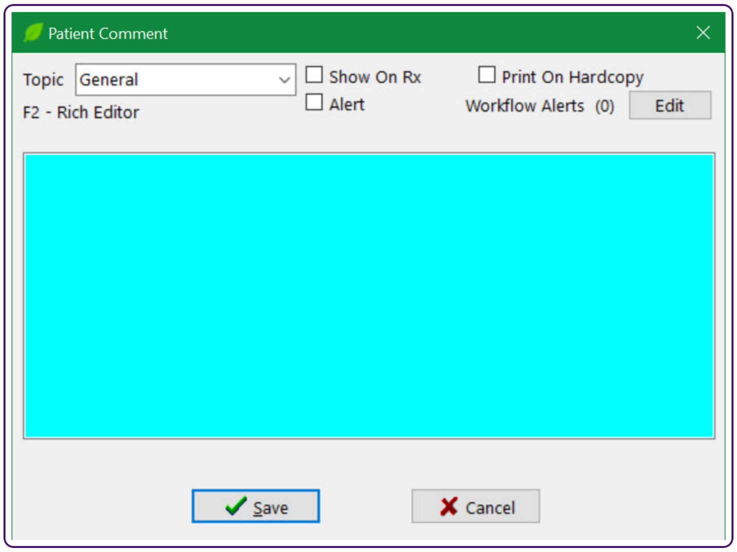
      The **Patient Picture** pop-up is displayed.



    - You can also select **Retry**, then select **From Other File** to load a saved image.
    - Optionally adjust the photo, then select **Save**.

15. Optionally enter one or more **Comments**:
    - Select **Ins** or simply begin typing in the **Comment** field.

      The **Patient Comment** pop-up is displayed.

    - Select a **Topic**.
    - Enter the text of your comment.
    - To display the comment on the **F12 Fill** window, select **Show on Rx**.
    - To print the patient comment on the hardcopy, select **Print on Hardcopy**.

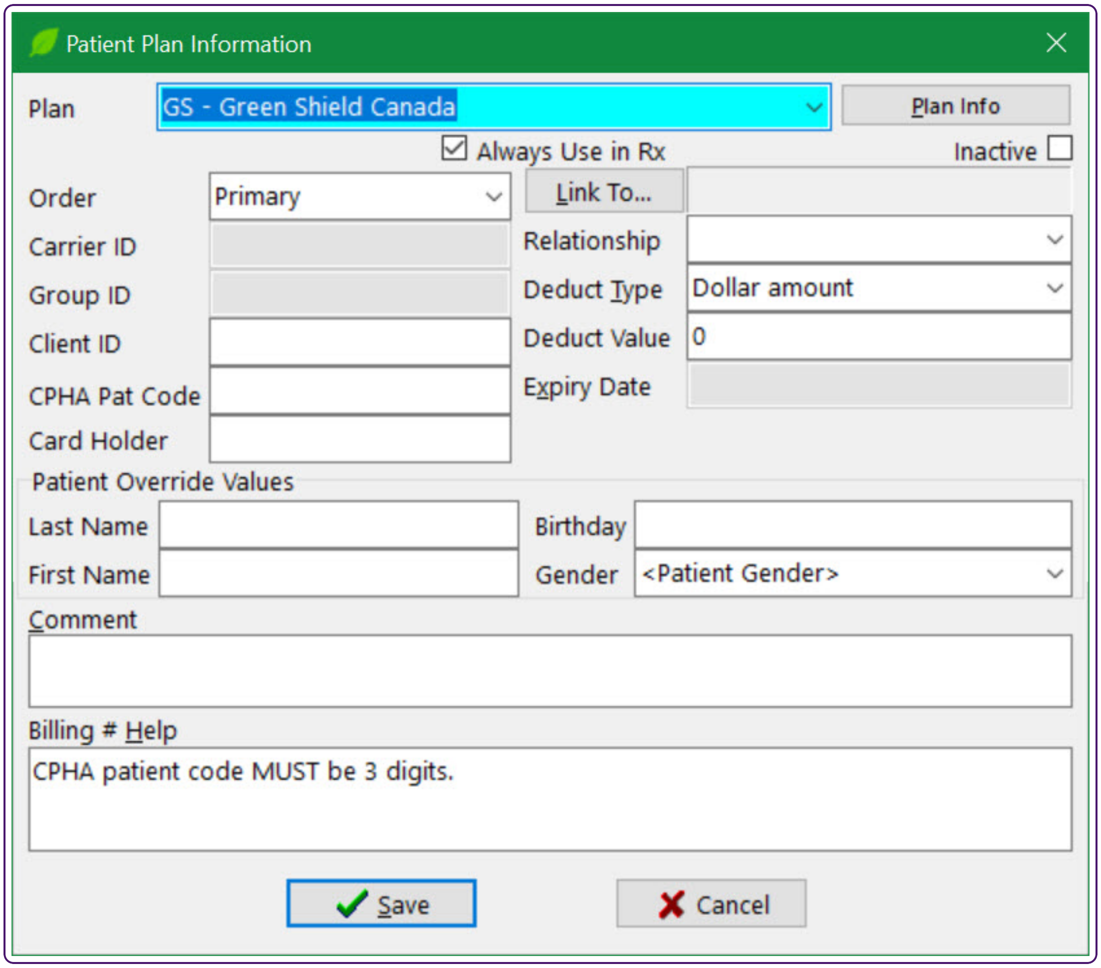
      This checkbox can only be selected for one comment, as there is limited space on the hardcopy.
    - To cause the comment to pop up every time the patient record is accessed, and every time an Rx is filled for the patient, select **Alert**.
    - Select **Save**.

16. In the **Plans** section, add the patient's third party plan information.

    A patient can have an unlimited number of third party plans. The system supports billing to all plans listed in the patient’s record.

    - Select **Ins**, or simply begin typing the name of the plan.

      The **Patient Plan Information** window is displayed.



    - Select the **Plan**.

      You can select the Plan Info button to display the details of the plan.

    - If there is only one plan for the patient, it is automatically be set as the Primary plan in the **Order** field. If there are multiple plans, specify the sequence of billing for coordination of benefits (i.e. primary, secondary, tertiary, etc.).

    - Obtain the **Carrier ID**, **Group ID**, and **Client ID** numbers from the patient’s plan card. Some plans do not require all of these fields to be filled out.

    - The **CPHA Pat Code** field is only used by certain plans, such as Green Shield.

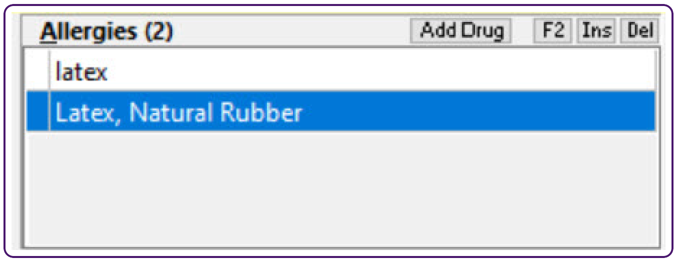
- In the **Patient Override Values** section, enter the patient's **Last Name** and **First Name** as they appear on the plan card, if they differ from the name in the patient record.

  This is the name that is sent to the plan. For example, if the patient's first name on the plan card is "Robert", but on the patient record it is recorded as "Bob", enter Robert here.
- The **Always Use in Rx** checkbox is selected by default. It applies the plan to all Rxs filled for the patient. You may want to deselect it for plans that only cover certain medications/products (e.g. STI Plans and Workers' Compensation Plans).
- Select **Inactive** if the plan no longer accepts claims for the patient. You can also delete plans instead.
- Select **Link To** to link an existing patient to the current plan.
- Select the **Relationship** of the beneficiary to the cardholder of the plan.
- Optionally enter a **Deduct Type**.

  This field is used for manually billed plans. It refers to how the patient deductible is calculated (e.g. select whether the deductible amount is calculated based on percentage or dollar amount).
- Optionally select a **Deduct Value**.

  This field is used for manually billed plans only; this must be left blank for real-time plans. If the plan is a manual plan, enter the value of the deductible in this field. This field works in conjunction with "Deduct Type".
- Optionally enter the plan's **Expiry Date** in the format DDMMYYYY.
- Optionally enter a **Comment** related to the patient record.
- Select **Save**.

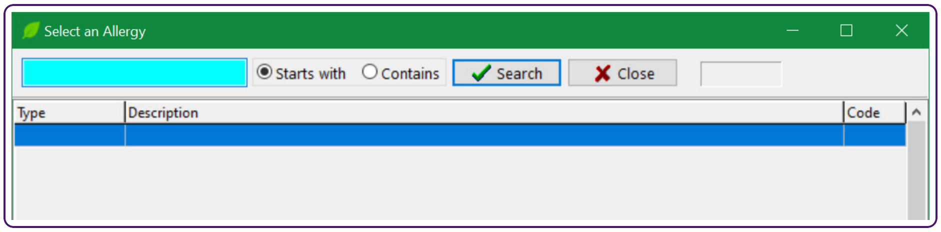
17. In the **Allergies** section, add the patient's allergies.



Allergies entered into the patient record are cross-checked against prescriptions filled for the patient using the **First Data Bank (FDB)** clinical module.

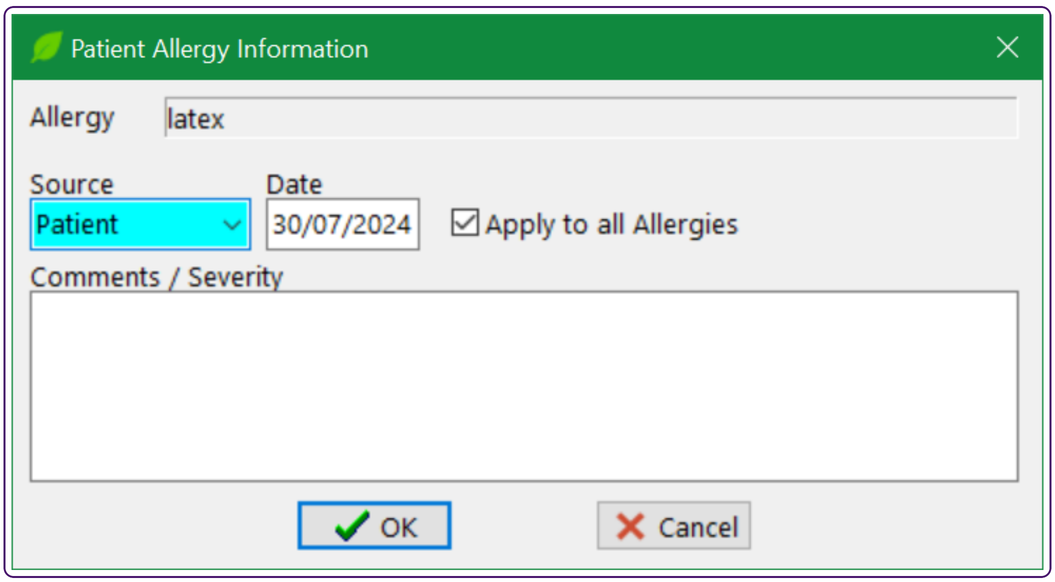
- To enter a therapeutic class of allergy:
  - Select **Ins**.

    The **Select an Allergy** pop-up is displayed:



  - Enter the text of the allergy, then select **Starts with** or **Contains**.
  - Select **Search** or press **Enter**.
  - To select an allergy, double-click it, or select it and then press Enter or click **Select**.

    The **Patient Allergy Information** pop-up is displayed.



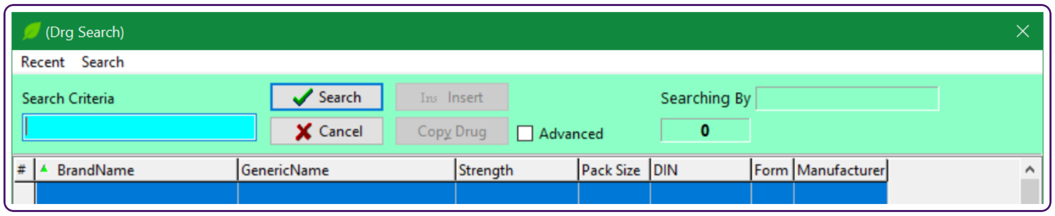
  - Select the **Source** of the allergy.
  - Enter the **Date** the allergy was reported.
  - If all of the allergies were reported on the same date and by the same source, select **Apply to all Allergies**.
  - Optionally enter any **Comments** regarding the allergy.

    Allergy entries with comments have asterisks (*) next to them.

  - Select **OK**.

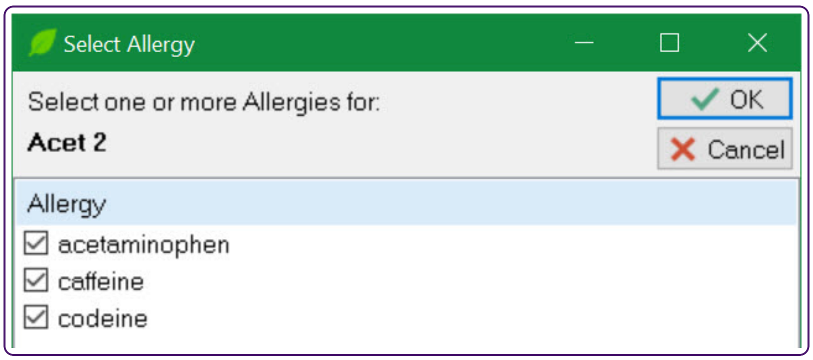
- To add an allergy by searching for a specific drug:
  - Select the **Add Drug** button.

    The **Drug Search** window is displayed.



  - Search for and select the drug to which the patient is allergic.
  - Click **Select**.

    The **Select Allergy** window is displayed.



    This window displays all of the components of the selected drug.

  - Deselect any of the components of the drug that the patient is not allergic to.
  - Select **OK**.

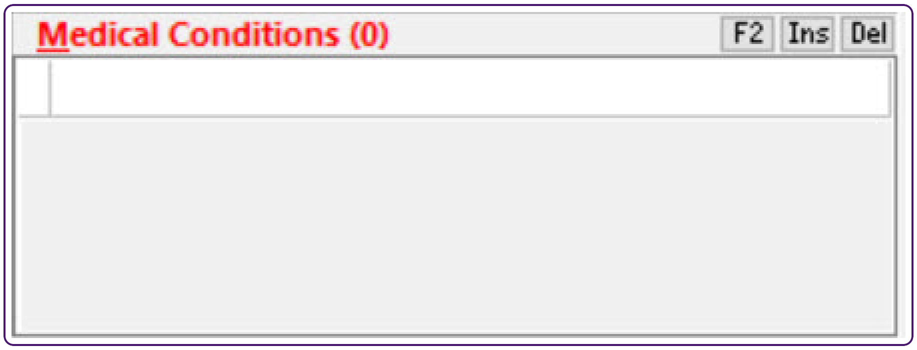
    The **Patient Allergy Information** pop-up is displayed.

  - Use the **Source** field to identify who reported this allergy.
  - Enter the **Date** the allergy was reported.
  - If all of the allergies were reported on the same date and by the same source, select **Apply to all Allergies**.
  - Optionally enter any **Comments** regarding the allergy.

    Allergy entries with comments have asterisks (*) next to them.

  - Select **OK**.

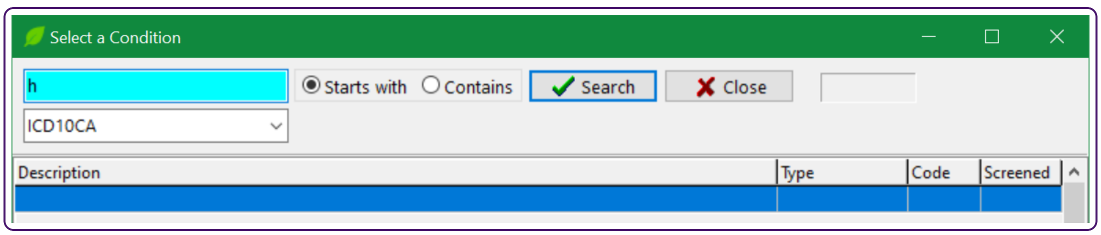
18. In the **Medical Conditions** section, add the patient's medical conditions.



Any number of medical conditions can be added to a patient record. Medical conditions entered for the patient are cross-checked against prescriptions in the patient profile using the **First Data Bank (FDB)** clinical module. You should only add physician-diagnosed medical conditions to the patient record, to prevent inaccurate clinical warnings from showing up during the prescription filling process.

- Select **Ins** or begin typing the condition in the field.

  The **Select a Condition** window is displayed.



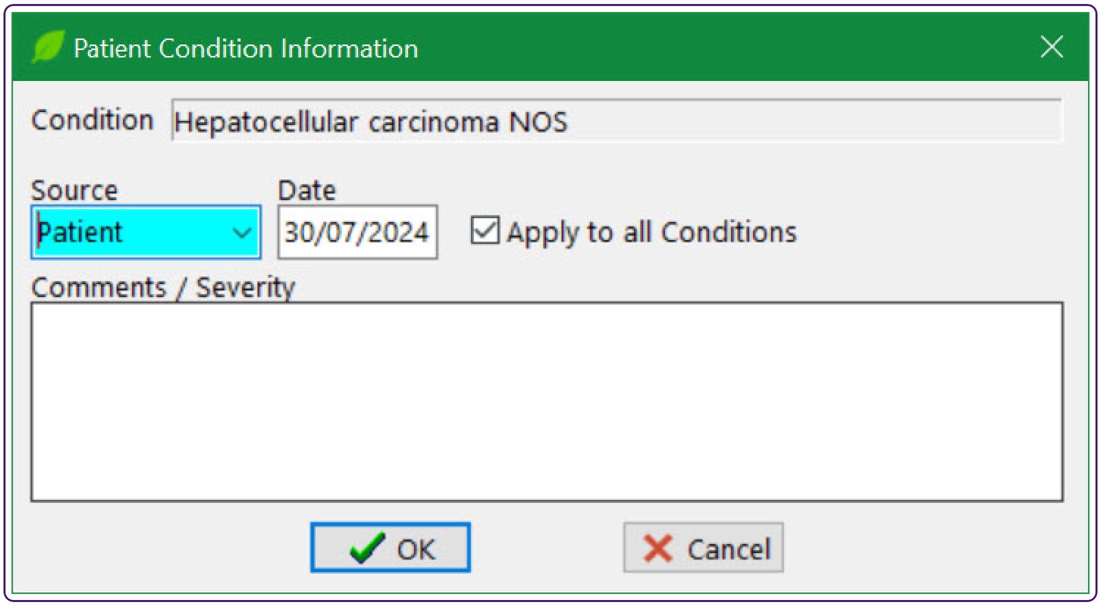
- Enter the text of the medical condition, then select **Starts with** or **Contains**.

  Optionally change the value in the unnamed drop-down list to search by **ICD-10-CA** or **FDBDX** conditions, or both.

- Select **Search**.

- To select a medical condition, double-click it, or select it and then press Enter or click **Select**.

  The **Patient Condition Information** pop-up is displayed.

- Use the **Source** field to identify who reported this medical condition.
- Enter the **Date** the medical condition was reported.
- If all of the medical conditions were reported on the same date and by the same source, select **Apply to all Conditions**.
- Optionally enter any **Comments** regarding the medical condition.

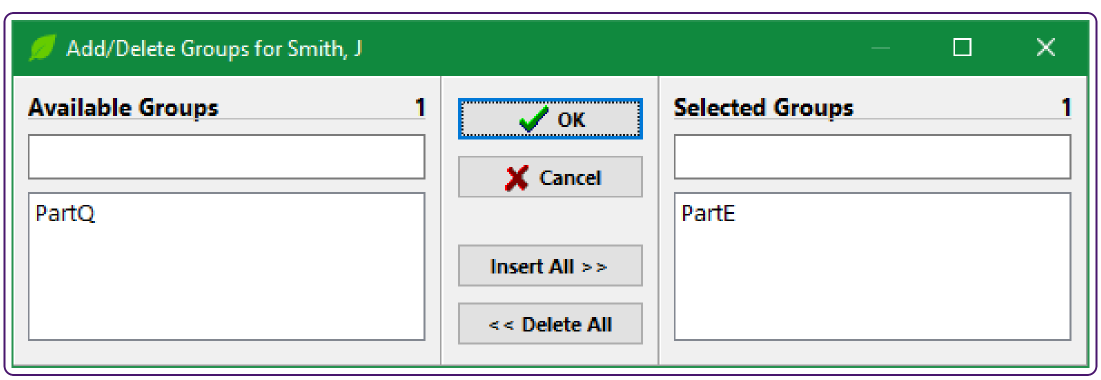
  Medical condition entries with comments have asterisks (*) next to them.

- Select **OK**.

19. In the **Groups** section, optionally add the patient to one or more groups:

- Select **Ins** or begin typing the name of the group in the field.

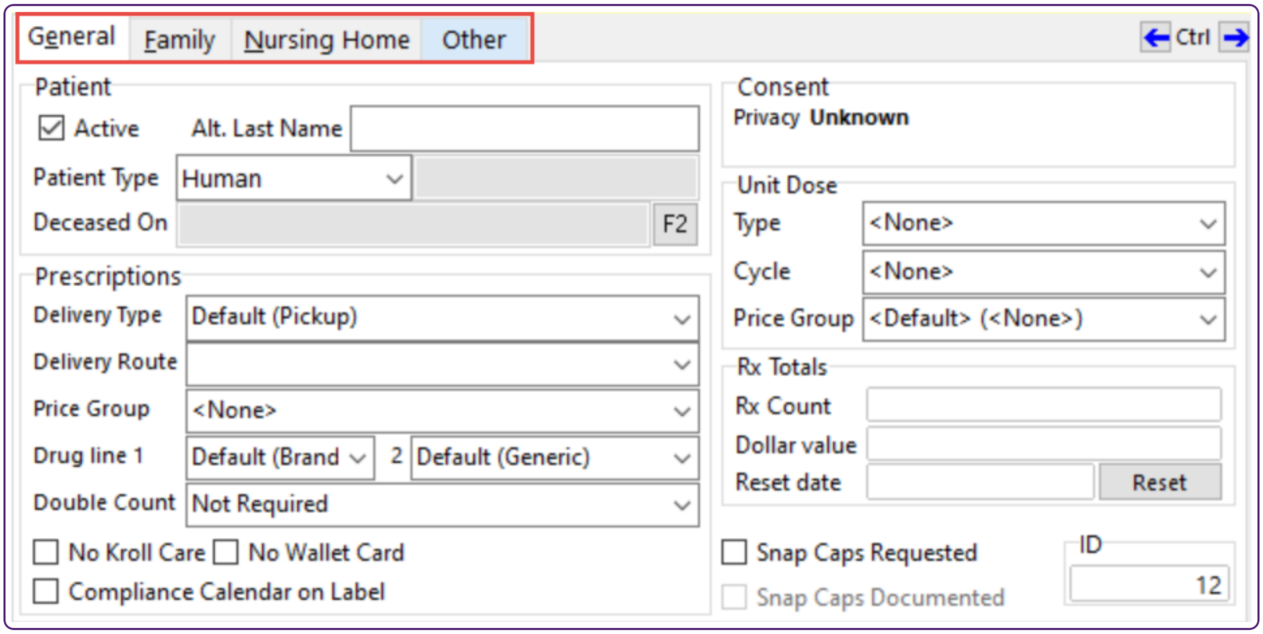
  The **Add/Delete Groups** popup is displayed.

20. Optionally update the information in the patient information tabs as described in "Patient Information tabs" (page 61).
21. Select **Save**.

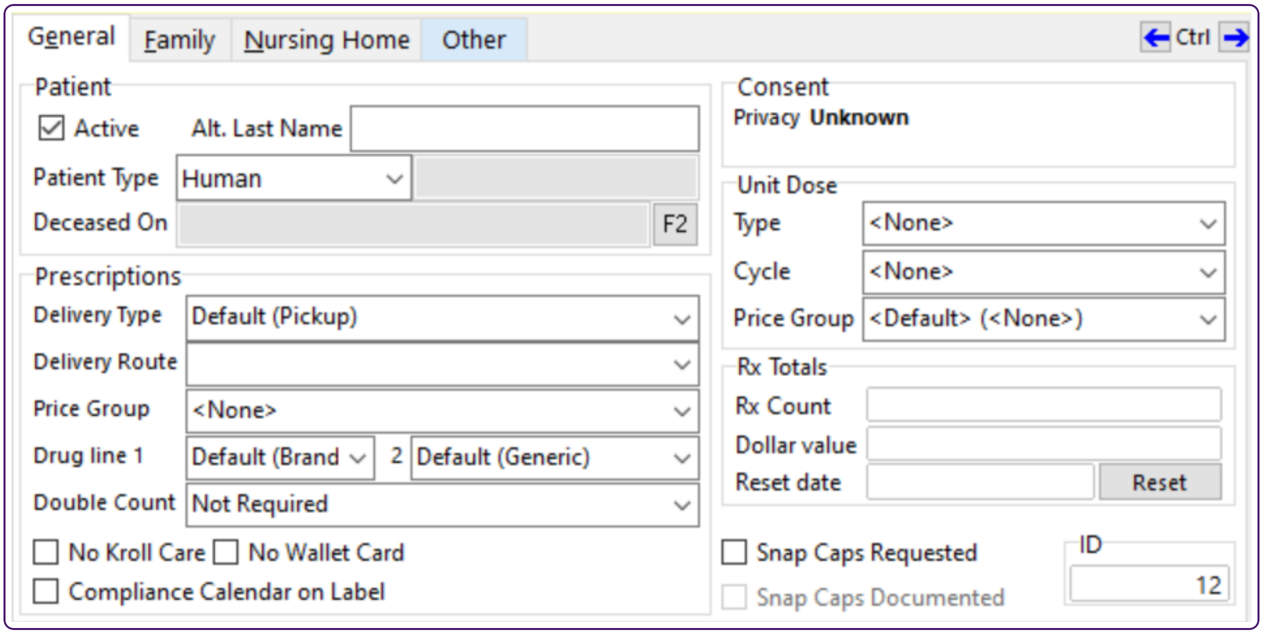
Patient Information tabs

The patient record contains tabs of information in the bottom right. Use the **Ctrl** key in conjunction with the underlined letter on the tab (e.g,. press **Ctrl + F** to access the Family tab) to switch between tabs. You can also flip from tab to tab by pressing **Ctrl +** → to move right or **Ctrl +** ← to move left.



General

The **General** tab displays the patient's general information and preferences.



1. If the patient has not filled a prescription with the pharmacy for an extended period of time, and you do not want them appearing in the regular patient search, deselect the Active checkbox.

   Inactive patients are excluded from reports unless otherwise specified in the **Options** tab of the report.
2. Optionally enter the patient's **Alt.** (alternate) **Last Name**.
3. Optionally change the **Patient Type** to a value other than Human.

   In certain provinces, selecting Animal triggers taxes to be applied to the patient’s prescriptions, as veterinarian Rxs are taxable. In certain provinces, selecting Animal prevents the patient’s prescriptions from being sent to the pharmacy network.
4. If the patient has passed, enter their deceased date in the **Deceased On** field.

   The **Active** checkbox is automatically unchecked.
5. Select the **Delivery Type** and **Delivery Route**.

   Delivery routes are defined in **Edit** > **Lists** > **Master Lists**.
6. Optionally select a **Price Group** to activate patient specific pricing.

   Patient price groups are set up by head office.
7. Optionally change the **Drug Line 1** and **Drug Line 2** from the default values to another value.

   Drug Line 1 refers to first piece of drug information printed on the vial label, and **Drug Line 2** is the second. The drug information is pulled directly from the Drug record.

8. Optionally specify if **Double Count** is required for the patient.

   If double count is required, a message is displayed on the packaging window during the filling stage to prompt you to double count medications for the patient.

9. If the patient has requested not to receive Kroll Care Monographs, select **No Kroll Care**.

   Kroll Care will not print any prescriptions filled for the patient.

10. If the wallet card should not be printed for the patient, select **No Wallet Card**.

11. To print a calendar according to the day supply on the Rx, select **Compliance Calendar on Label**.

    The patient can use this calendar to record when a dose has been taken.

12. In the **Unit Dose** section, optionally enter the dose packaging details.

    If a **Unit Dose Type** or **Unit Dose Cycle** has been selected, you are prompted to activate and configure unit dose packaging for each prescription that is processed for the patient.

    - Enter the **Type** of unit dose packaging used for the patient, and the number of week of medication packaged for the patient for one **Cycle**, and select the **Price Group** that adds a supplementary charge to unit dose Rxs.

      Unit dose price groups are configured and set up by head office.

13. The **Rx Totals** is a read-only section keeps a running total of the number of Rxs filled for the patient and the cumulative dollar value of those Rxs. To reset the counters to zero, select **Reset**. The date will appear in the **Reset date** field.

14. If the patient requested snap cap vials, select the **Snap Caps Requested** checkbox.

    A message will be displayed on the packaging window during the filling stage, to prompt the pharmacist to package medications in snap cap vials, and "Snap Caps Requested" will be printed on the hardcopy.

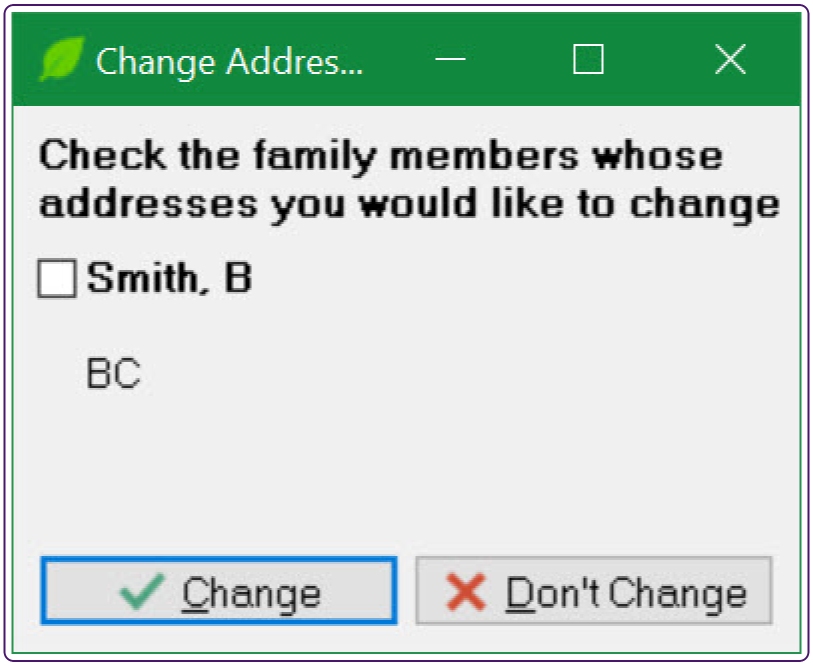
15. If the patient provided written documentation or consent to package their medication in snap cap vials, select the **Snap Caps Documented** checkbox.

    This checkbox is disabled unless the **Snap Caps Requested** checkbox is selected.

16. When the patient record is created, it is assigned a read-only ID that is used to track the patient within the system tables.

Family

Family members can be grouped together in the system, to make managing records more efficient. If you change the information for one member of a family group, (such as their address, telephone number, or third party plan information, you can extend these changes to other family members. After you save the updates, the following pop-up is displayed. Select the names of the family members whose information you would like to change, then select **Change**.



Grouping family members also links family work orders together at the point of sale. For example, if John and Jane are linked as family members and both have prescriptions ready for pick-up, when the pharmacy user accesses John's prescriptions at pickup, Jane's prescriptions will be displayed as well. The patient can be asked if he wants to pick up her prescriptions as well. The family can consolidate their trips to the pharmacy and help users manage the Pickup Bins more effectively.

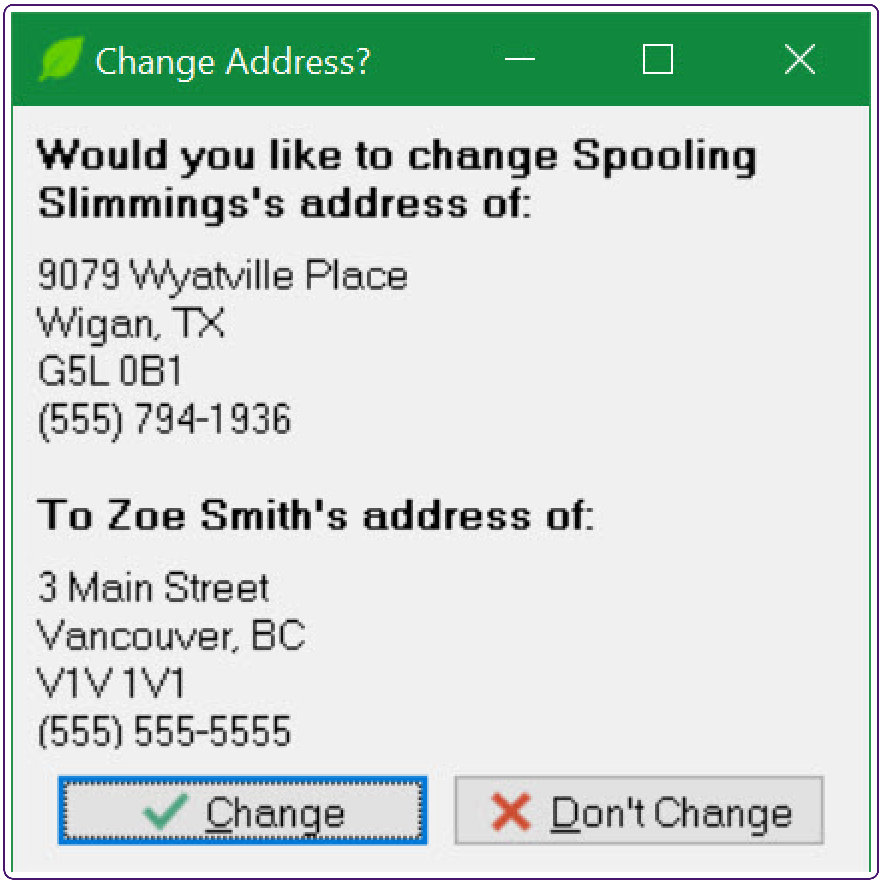
To add a family member:

1. Select **Ins**.

   The **Patient Search** window is displayed.

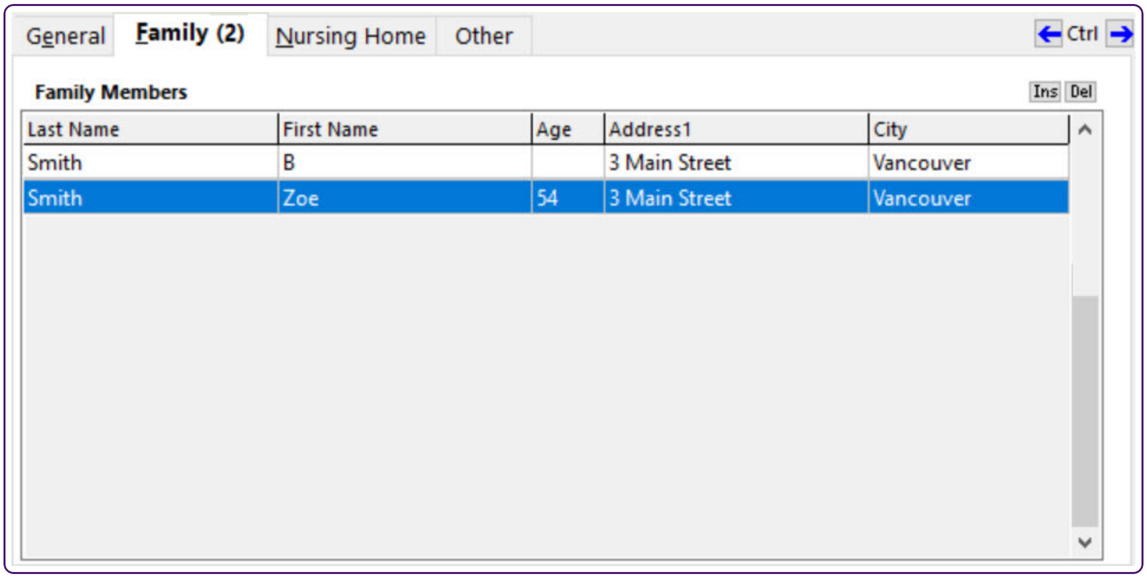
2. Search for and select the family member as you normally would.

   If the family member you are linking has a different address than the original patient, you are asked whether you want to update the family member's address to match the current patient's address.



3. Select the applicable button.

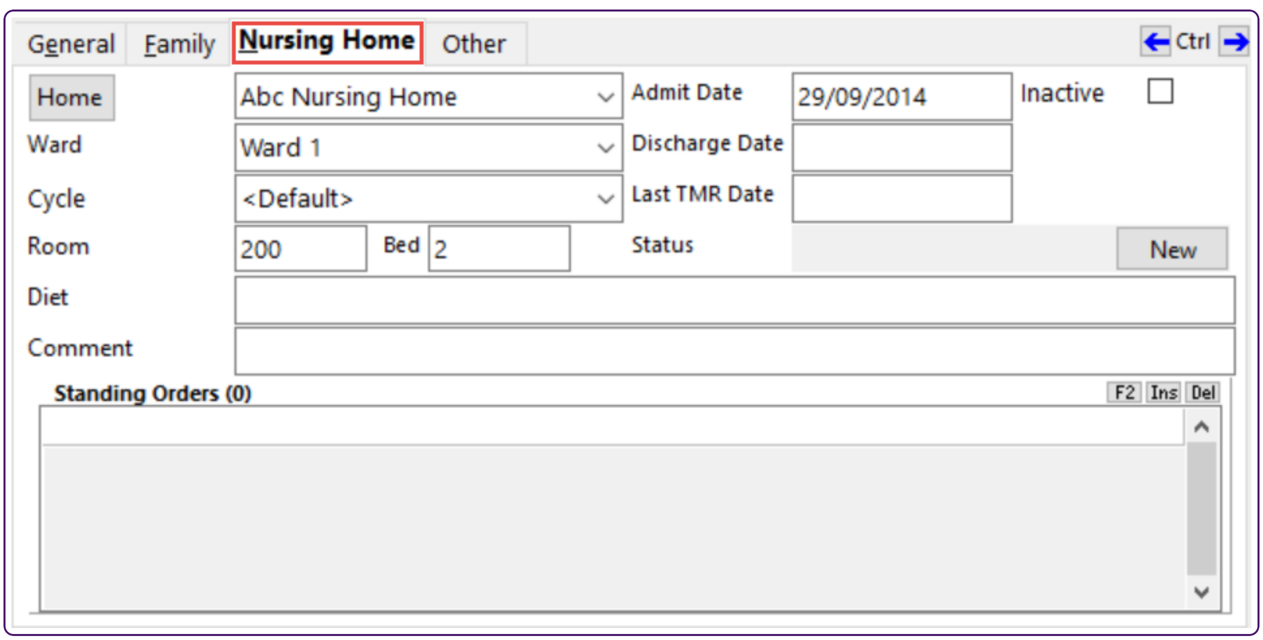
   The family member is added.



If a patient is added into the database by copying an existing patient, the Family link will automatically be created.

Nursing Home

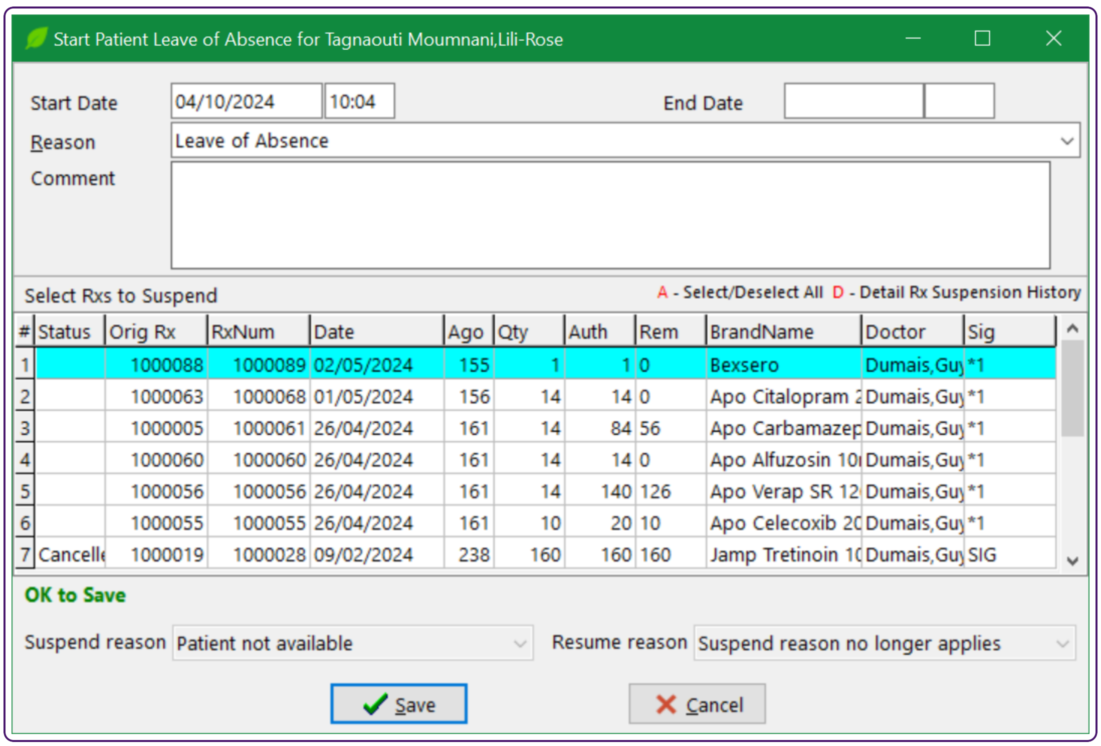
The **Nursing Home** tab displays information that pertains to nursing home patients only.



1. Select the **Home** you want to enroll the patient in.

   This field lists the nursing homes configured in your system.
2. Select the applicable **Ward** and **Cycle**.
3. Optionally enter the patient's **Room** and **Bed** numbers.
4. If the patient has dietary restrictions, enter them in the **Diet** field.
5. Optionally enter comments in the **Comment** field.
6. Enter the Admit Date.
7. If the patient has been discharged from the nursing home, enter the **Discharge Date**.
8. Optionally enter the date the patient received their last three-month review in the **Last TMR Date** field.
9. If the patient is on a leave of absence (LOA):
   - Select the **New** button to the right of the **Status** field.

     The **Start Patient Leave of Absence** pop-up is displayed.

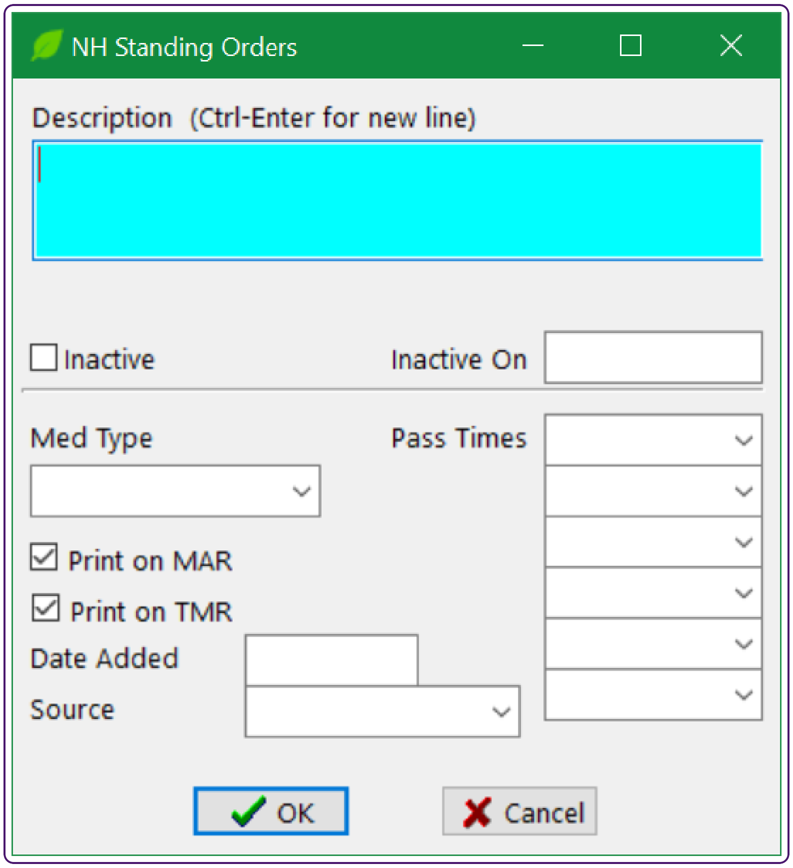
   - Complete the form and select **Save**.

10. Complete the **Standing Orders** section.

    This section is used to record the medications that registered nurses and registered psychiatric nurses administer based on their assessments of the resident's needs. These orders must not exceed three doses per 24-hour period without notifying the physician. Any rapid deterioration in the resident's condition must be reported to the physician immediately.

    - Select **Ins**.

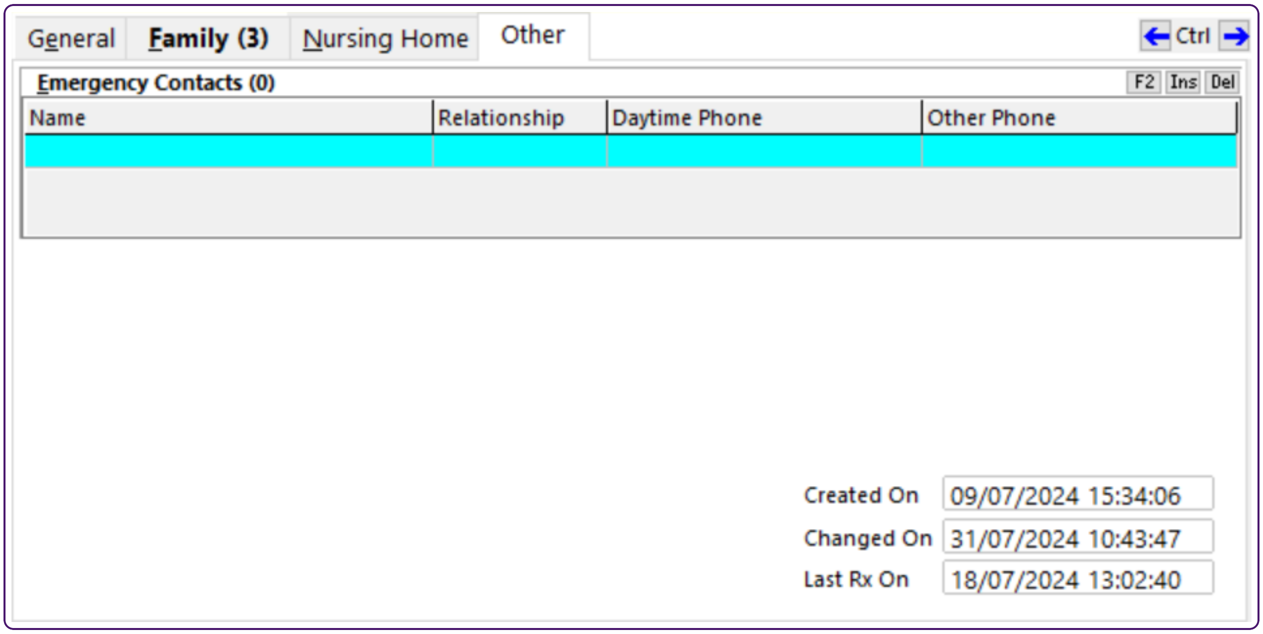
      The **NH Standing Orders** window is displayed.

    - Complete the necessary fields and select **OK**.

Other

The **Other** tab displays the patient's emergency contacts, as well as the dates the patient record was created, when it was last changed, and when a prescription was last filled for the patient.



Copying an existing patient record

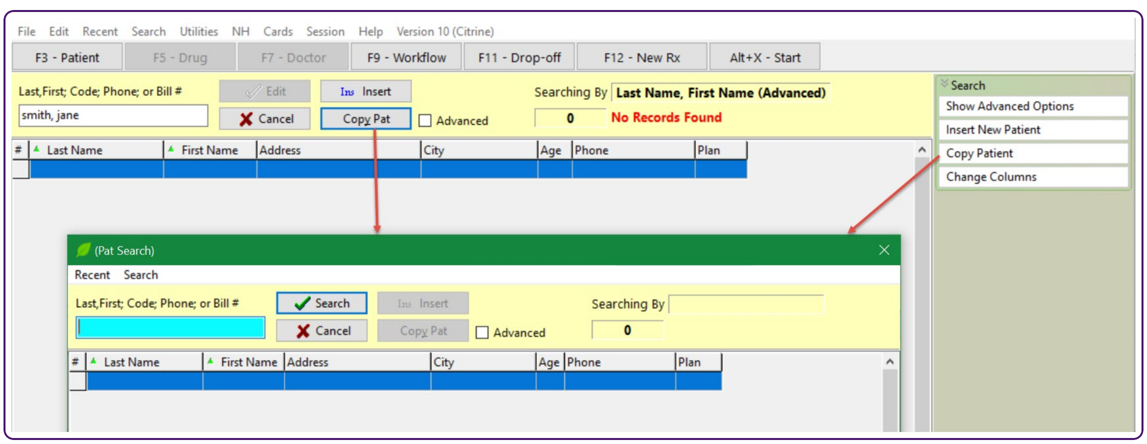
If a new patient has a family member who is already in the system, you can use the **Copy Pat** function to copy information from the family member to a new patient record.

1. Perform a thorough search to ensure the patient does not already exist in the database.

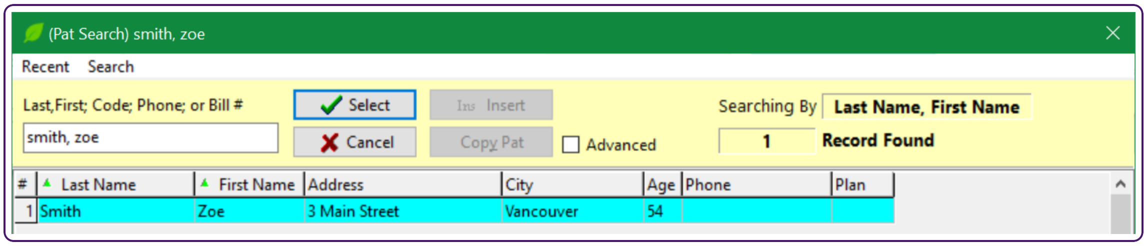
   It is recommended that you perform an **Advanced** search for inactive patients as well.

2. Select **Copy Pat** or **Copy Patient**, or press **CTRL+Y**.

   A second patient search window is displayed.



3. Search for the family member who is already in the system.



4. Highlight the family member and click **Select**.

   The family member's patient record is displayed.

   Review the information and confirm this is the patient you want to copy information from.

5. Click **Select**.
6. Complete the new patient's record as described in "Creating a patient record" (page 47).

   Enter missing information for the new patient record such as birthdate, gender, snap cap preference, and phone numbers.

7. Click **Save** to save the patient record.

> Third party plans are linked to the patient that the information was copied from. If any changes to the plan numbers must be made, it must be done from the originating patient record.

Patient profile

The patient profile displays a list of medications the patient has filled at the pharmacy. Each line within the profile represents a written prescription with details such as the Rx number, dispensed quantity, drug brand name, SIG, authorized quantity, remaining quantity, prescriber, and dispensed date. Users can perform actions against these entries, such as refill, modify, cancel, inactivate, and detail.

The patient profile also enables pharmacy users to actively participate in monitoring patient care, by comparing new medication orders to all of the medications that the patient has been taking. This reconciliation is done to avoid medication errors such as omissions, duplications, dosing errors, or drug interactions. This verification should be performed at every transition of care in which new medications are ordered or existing orders are rewritten.

Patient profile views

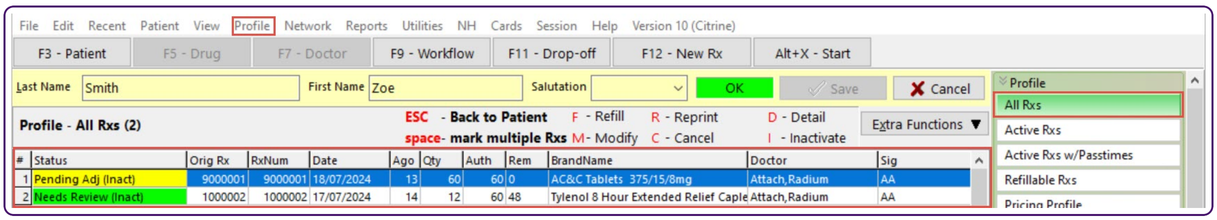
Eight (8) patient profile views available in Kroll. You can use these views to filter and display different statuses of prescription information.

All Rxs

The **All Rxs** profile displays all of the prescriptions filled for the patient regardless of when the Rx was filled, or the Rx status. This view is useful for viewing prescriptions that have been inactivated or transferred out.

To access the **All Rxs** view, do one of the following:

- From the patient profile or **F11 - Drop-off** window, do one of the following:
  - Press **Shift + F3**, or
  - Press **Shift + F4**, or
  - Select **All Rxs** from the right navigation pane.
- From the patient profile, select **Profile** > **All Rxs**.



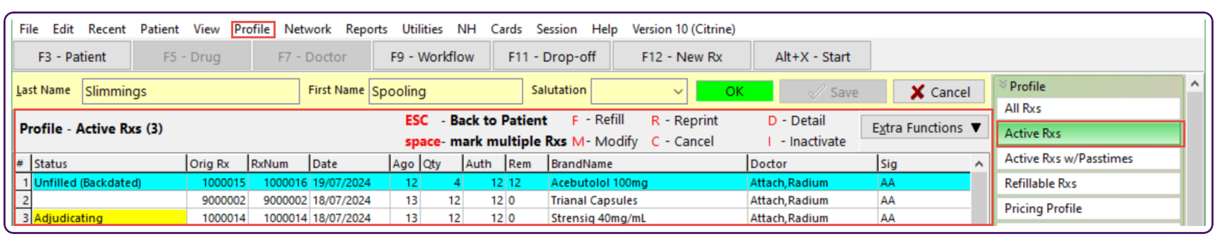
Active Rxs

The **Active Rxs** medication profile displays prescriptions with an **Active** prescription status. This includes prescriptions that are Unfilled, Not dispensed, Transferred-In or have a <blank> status.

This view is useful for filtering out prescriptions that have been inactivated or transferred-out.

To access the **Active Rxs** view, do one of the following:

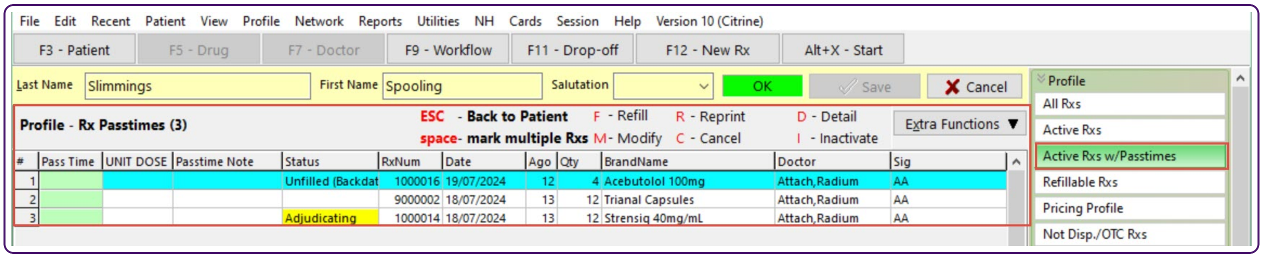
- From the patient profile or **F11 - Drop-off** window, press **Shift + F5** or select **Active Rxs** from the right navigation pane.
- From the patient profile, select **Profile** > **Active Rxs**.



Active Rxs with Passtimes

The **Active Rxs w/ Passtimes** profile is similar to the **Active Rxs** tab, but it includes additional columns that show unit dose information for prescriptions that are configured for unit dosing. These additional columns show the pass time, unit dose quantity, and pass time note.

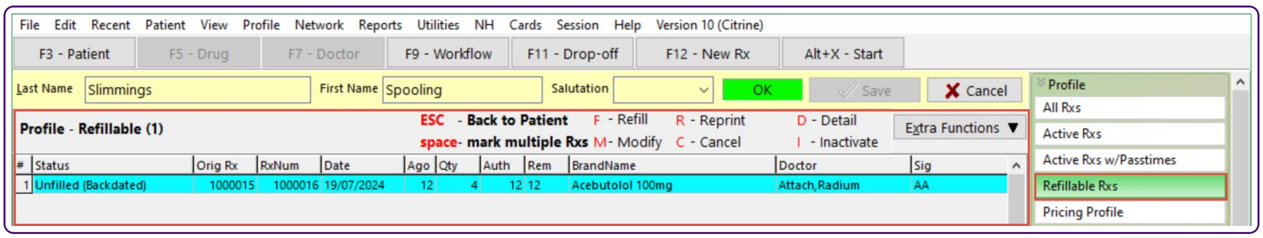
To access the **Active Rxs** view, from the patient profile or **F11 - Drop-off** window, press **Shift + F10** or select **Active Rxs w/ Passtimes** from the right navigation pane.



Refillable

The **Refillable Rxs** medication profile displays only those prescriptions with a **Remaining Quantity** left on the prescription. In other words, this view filters out prescriptions that cannot be refilled, while only displaying those prescriptions that can be refilled.

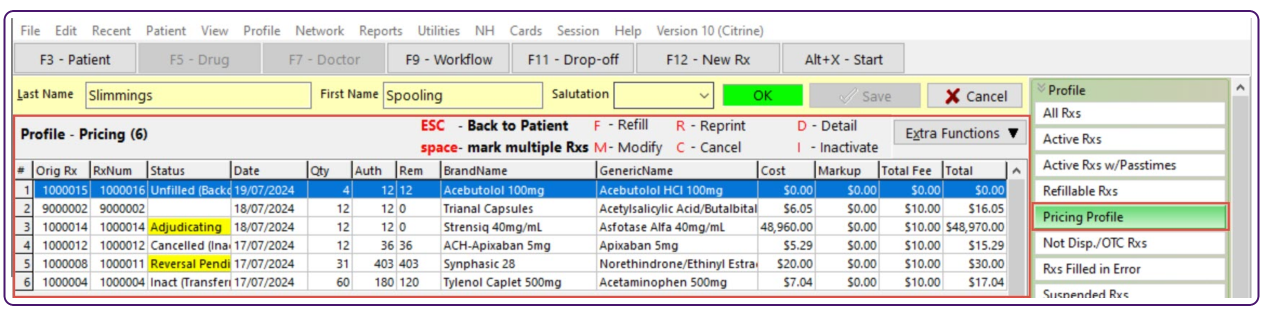
To access the **Refillable Rxs** view, from the patient profile or **F11 - Drop-off** window, press **Shift + F6** or select **Refillable Rxs** from the right navigation pane.



Pricing Profile

The **Pricing Profile** displays all of the prescriptions filled for the patient, and their cost, markup, fee, and Rx Total. The values represent amounts pulled from the last filled Rx in the prescription chain. This view is useful for determining prescription pricing and resolving pricing discrepancies.

To access the **Pricing Profile** view, from the patient profile or **F11 - Drop-off** window, press **Shift + F7** or select **Pricing Profile** from the right navigation pane.



Not Dispensed/OTC Rxs

The **Not Dispensed/OTC Rxs** medication profile displays prescriptions that have been marked with a status of “Not Dispensed”. Over-The-Counter (OTC) products are added to the patient profile and marked s “Not Dispensed” to allow drug interaction checking to occur without generating official prescription receipts.

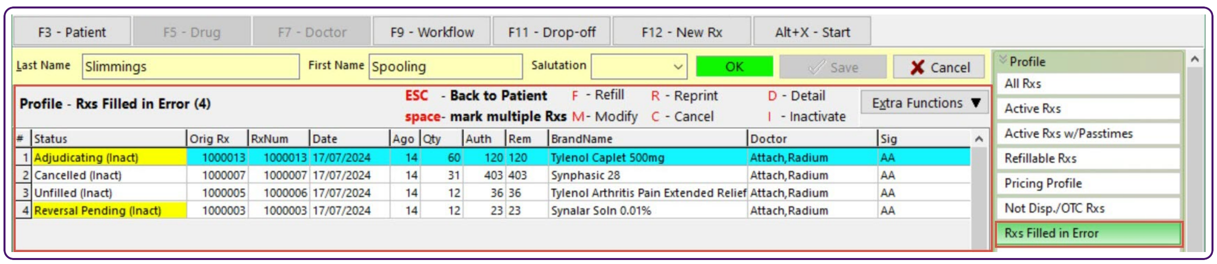
To access the Not Dispensed/OTC Rxs view, from the patient profile or **F11 - Drop-off** window, press **Shift + F8** or select **Not Disp/OTC Rx** from the right navigation pane.

Rxs Filled in Error

The **Rxs Filled in Error** view displays prescriptions filled in error for the patient. This profile is commonly known as the “Garbage Profile” because it houses prescriptions for the patient that should not have been filled and contain incorrect information. Entries in this profile are excluded from drug interactions checking and should not influence dispensing decisions.

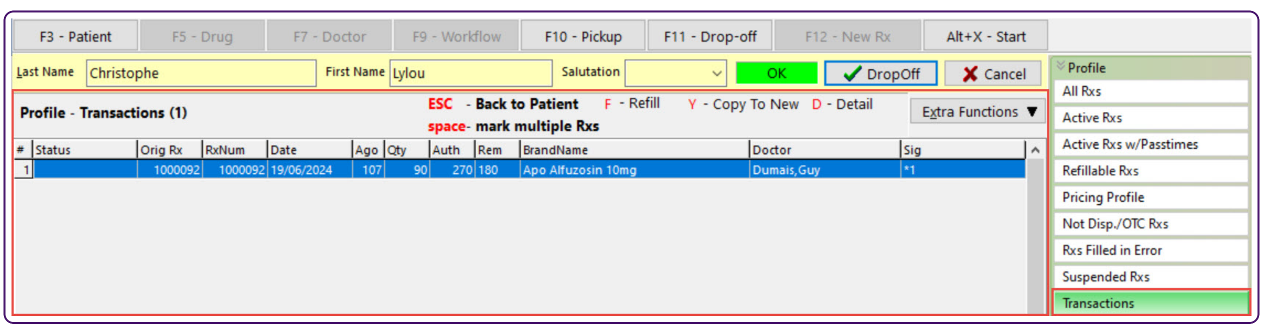
To access the Rxs Filled in Error view, do one of the following from the patient profile:

- Press **Shift + F9**,
- Select **Rxs Filled in Error** from the right navigation pane, or
- Select **Profile** > **Rxs Filled in Error**.



Transactions

The **Transactions** view lists all of the transactions completed for the patient.



Suspended Rxs

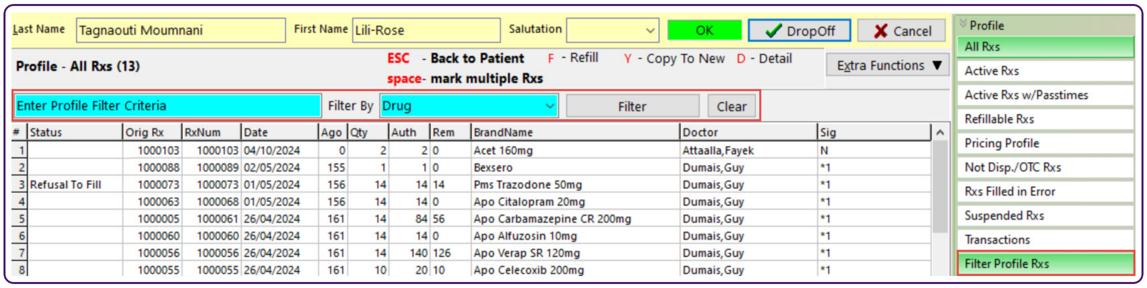
The **Suspended Rxs** view displays Rxs that were marked as suspended.

Filter Profile Rxs

You can filter views by **Drug** or **Rx Comment**.

1. Select the view you want to filter, such as **All Rxs**.
2. Select **Filter Profile Rxs**.

   A filter is displayed above the table.

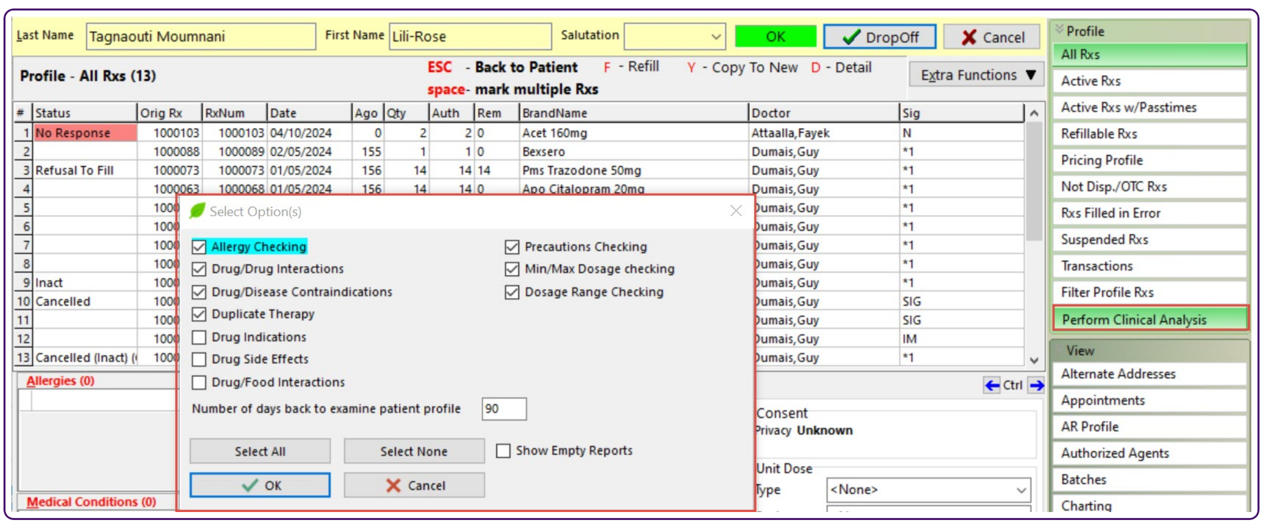


3. Enter your search criteria
4. From the **Filter By** drop-down list, select Drug or Rx Comment.
5. Select **Filter**.

   To remove the filter, select **Clear**. To hide the filter, re-select **Filter Profile Rxs**.

Perform Clinical Analysis

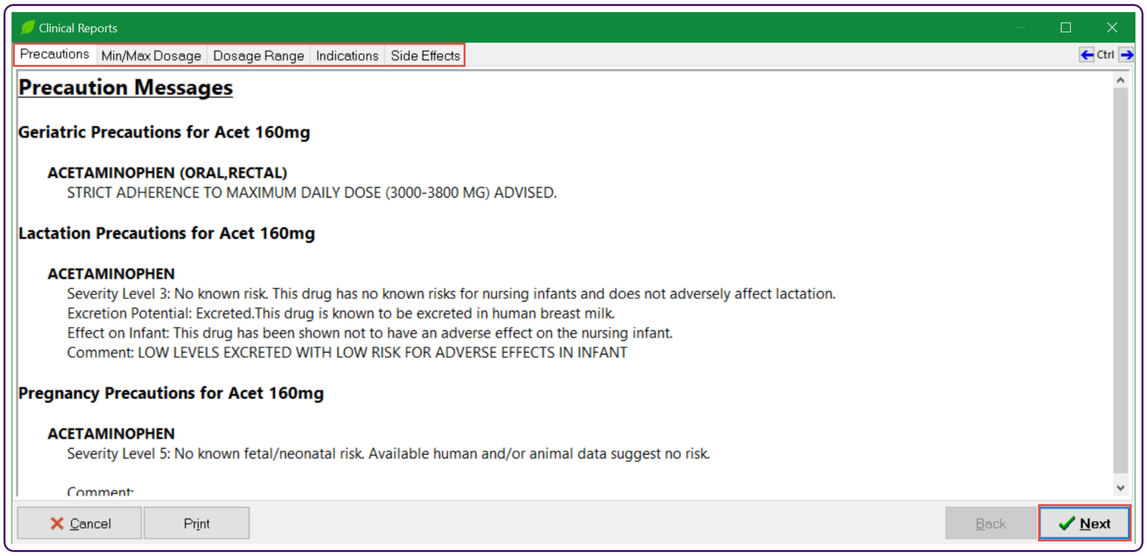
Select the **Perform Clinical Analysis** option from the patient sidebar to a perform a clinical interactions analysis on a patient's medication profile,



1. From the selection window, select the clinical information you want to retrieve, or **Select All** or **Select None** .
2. Select **OK** or press **Enter** to execute the analysis.

   The **Clinical Reports** window is displayed. The results are displayed in a series of tabs.

3. Select a tab to display it, or click the **Next** button to display the next tab.



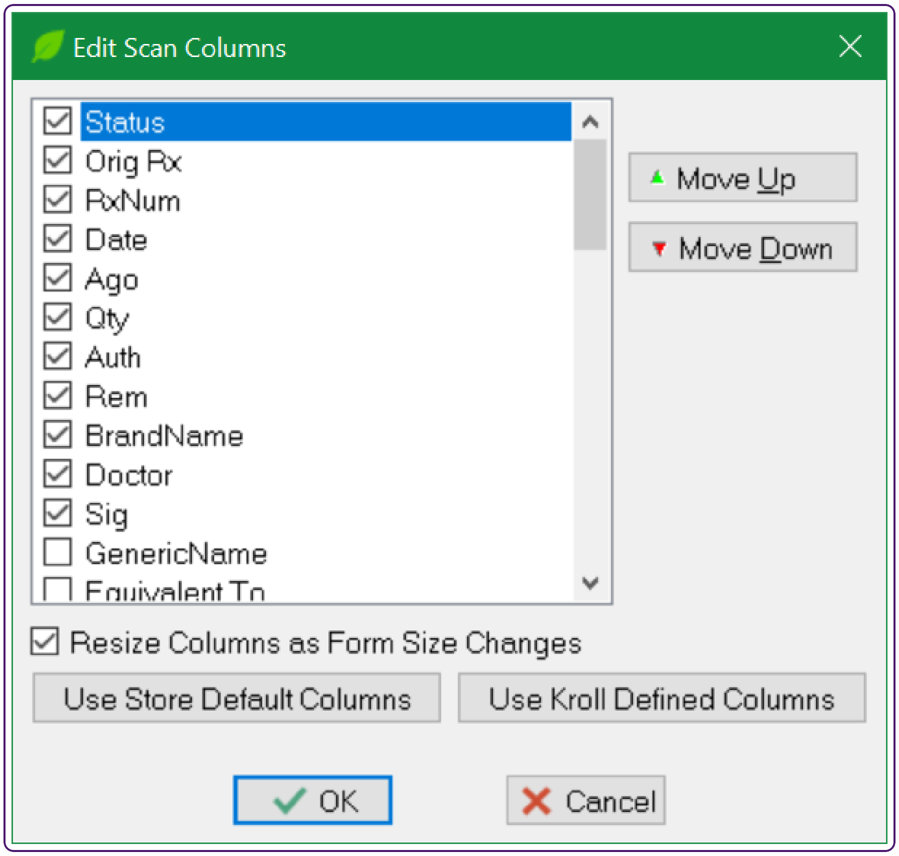
Configuring the columns in the Patient Profile

You can configure which information columns are displayed on the patient profile.

1. Right-click anywhere on any patient profile column, and from the menu that is displayed, select **Change Columns**.

   You can also display this menu by selecting the **Extra Functions** button or pressing X.

   The **Edit Scan Columns** pop-up is displayed.



2. Select the columns you want to be displayed, and deselect those you want to hide.
3. To resequence a column, select it and then select **Move Up** or **Move Down**.
4. To revert to the store or Kroll default columns, select **Use Store Default Columns** or **Use Kroll Defined Columns**.
5. Select **OK** to save your changes.

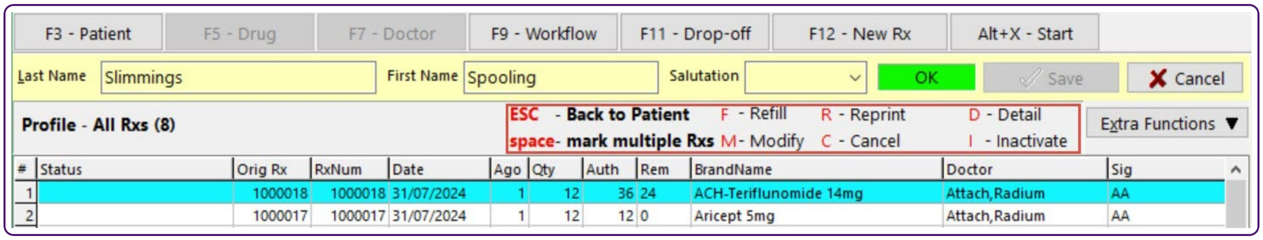
The following table describes some of the columns you can select.

Name	Description
Ago	The number of days ago the prescription was filled.
Auth	The authorized prescription quantity in units (e.g. the number of tablets/caplets).
Auth #	The number of refills authorized.
B	Batched prescription (Y or N).
BrandName	The brand name of the drug.
Card #	The blister card number the prescription is assigned to.
CF	Central Fill prescription (Y or N).

Name	Description
Cost	The calculated cost of the last filled Rx in the prescriber chain.
Date	The date of the last filled Rx in the prescriber chain.
Days	The days' supply of the last filled Rx in the prescriber chain.
DIN	The Drug Identification Number of the drug product.
Doctor	The name of the individual who prescribed the prescription.
Due	The number of days until the prescription is due to be refilled.
Equivalent To	The brand name equivalent of the drug product being dispensed. This column is not populated if the associated field is not populated on the drug record.
Exp Date	The expiry date for the written prescription. Expiry dates for written prescriptions vary from province to province and drug schedule to drug schedule.
Fee	The calculated fee of the last filled Rx in the prescriber chain.
GenericName	The generic name of the drug.
Inact	Whether the prescription is inactive (True or False).
Init	The user initials of the pharmacist who worked on the prescription.
Markup	The calculated markup of the last filled Rx in the prescriber chain.
Methadone Ingest Date	The Methadone Ingest Date for methadone prescriptions.
MI	Whether the prescription was billed to a third party with an "MI" intervention (Y or N).
Mix Fee	The calculated mixture fee for the last filled Rx in the prescriber chain.
NH	Nursing Home prescription (Y or N).
Orig Rx	The original prescription number for the prescriber chain.
Orig Date	The date the first Rx of the prescriber chain was filled.
Qty	The dispensed quantity.
Rem	The remaining prescription quantity in units (e.g. the number of tablets/caplets).
Rem #	The number of refills remaining.
RxNum	The prescription number of the last filled Rx in the prescriber chain.
Sig	The SIG code for the prescription (not expanded).
Sig Expansion	The expanded SIG code for the prescription. For example, "Take one tablet once daily until finished".
SSC Fee	Special Service Code Fee: the dollar value of this fee.
Status	Prescription Status (e.g. <BLANK> = Active, Inactive, Unfilled, Not Dispensed, Transferred In, Transferred Out, etc.)
Tech	The user initials of the assistant who worked on the prescription.
Total	The total dollar value of the last filled Rx in the prescriber chain. (Cost + Markup + Fee + MixFee + SSCFee = Total).
Total Fee	The total fees of the last filled Rx in the prescriber chain. (Fee + MixFee + SSCFee = Total Fee).
U	Unit Dose Indicator: whether the prescription is configured for unit dosing (Y or N).

Patient Profile commands

There are several commands you can execute on highlighted or tagged prescriptions in the patient profile. Eight commands are identified below; the others are accessible from the **Extra Functions** button.



ESC – Back to patient

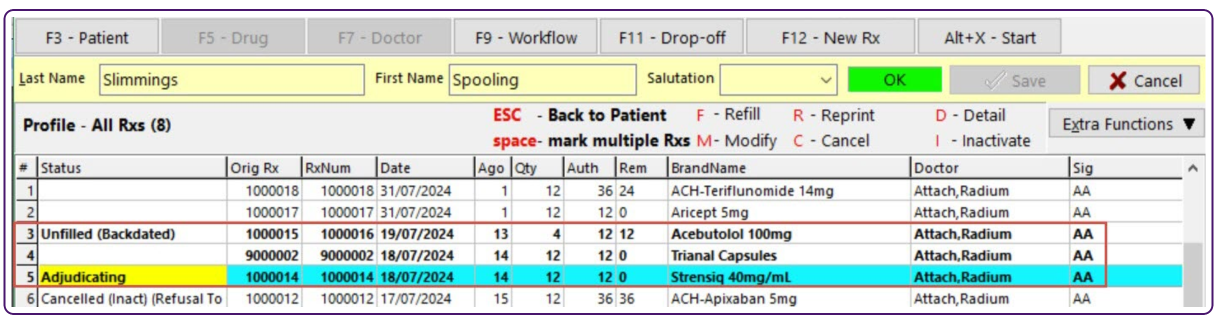
Press the **Esc** key to return to the patient record from the patient profile.

Space – Mark multiple Rxs

You can tag multiple prescriptions and then select a command to perform on all of them. For example, if you select three prescriptions and then select Cancel, the first prescription is brought through the cancellation process, then the second, then the third.

To tag prescriptions on the patient profile:

- Highlight an Rx entry and press the space bar. The entry is bolded.



- Repeat this step to tag additional Rxs.

F-Refill

To tag prescriptions for refill:

1. Highlight or tag the prescription(s) to be refilled.
2. Press **F** or select **F- Refill**.

   The **F12 - Fill Rx** window is displayed.

   The status of the prescription on the upper left hand corner of the window shows "Refill”. A work order due time must be selected from this window in order to continue processing the prescription.

M-Modify

To tag prescriptions to modify:

1. Highlight or tag the prescription(s) to be modified.
2. Press **M** or select **M - Modify**.

   The **F12** window is displayed.

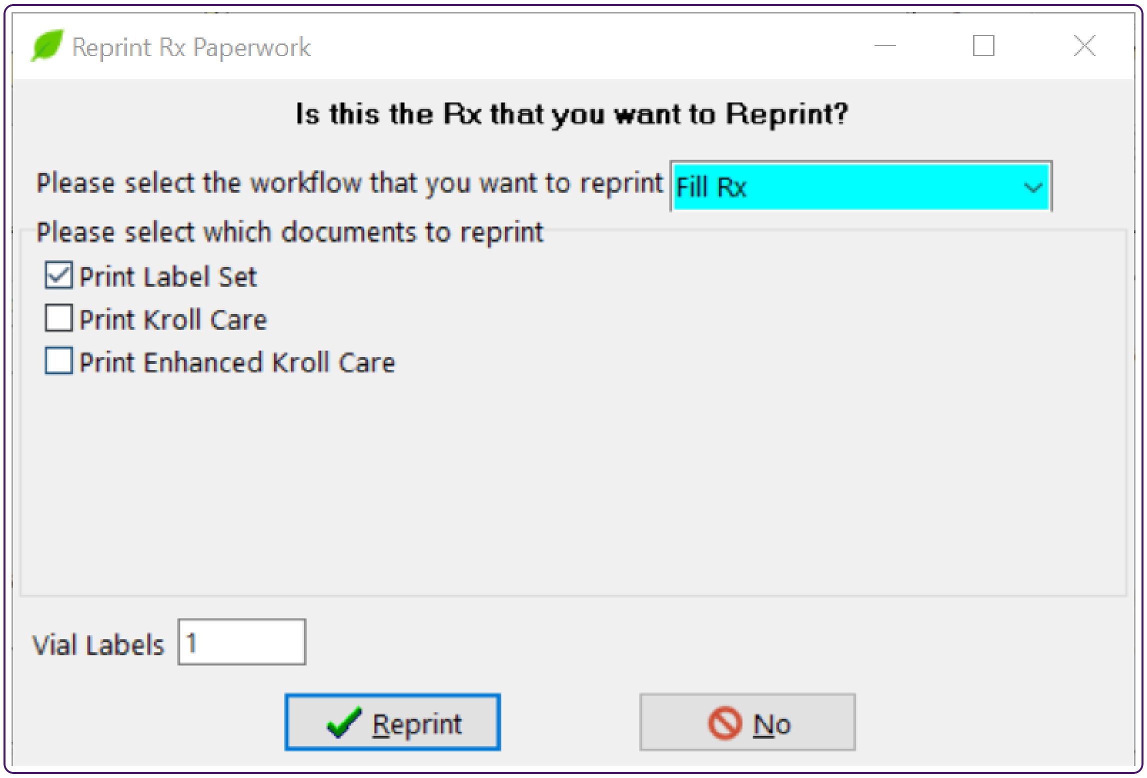
   Once a prescription has been adjudicated to a plan, only certain fields can be modified. Fields that impact price are read-only.

R-Reprint

To tag prescriptions to reprint:

1. Highlight or tag the prescription(s) from the patient profile.
2. Press **R** or select **R - Reprint**.

   The **Reprint Rx Paperwork** pop-up is displayed.



3. Select the workflow and the documents you want to reprint, as well as the number of **Vial Labels**, then select **Reprint**.

C-Cancel

Cancelling a prescription is synonymous with reversing it. When an Rx is cancelled after adjudication to a third party, a reversal is also made for financials. Cancellations are always initiated on the pharmacy side. They cannot be initiated by a patient. To cancel a prescription, the patient would have to call the pharmacy directly and request that the prescription be cancelled.

To cancel prescriptions:

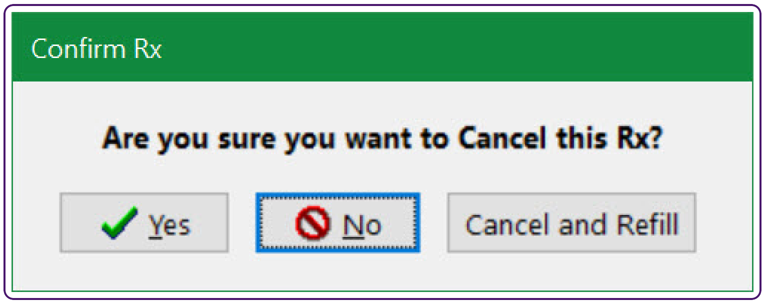
1. Highlight or tag the prescription(s) from the patient profile.
2. Press **C** or select **C-Cancel** .

   Each prescription is brought up in cancel mode.

The following sections describe these prompts and their impacts on invoices and the payment process.

Confirm Cancellation Type

Upon cancellation of a prescription in the patient's profile, the **Confirm Rx** dialog box is displayed. The button you select determines the type of cancellation you will perform.

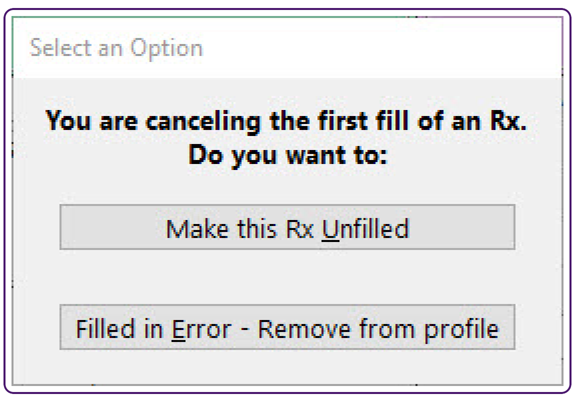


- Select **Yes** if you want to cancel the prescription without replacing it with a different prescription.
- Select **No** if you no longer want to cancel the prescription.
- Select **Cancel and Refill** if you want to cancel the prescription and replace it with a different prescription.

Cancel

If you select **Yes**, the prescription is cancelled and not replaced. The impact on invoices is different depending on whether the invoice is Paid or Posted.

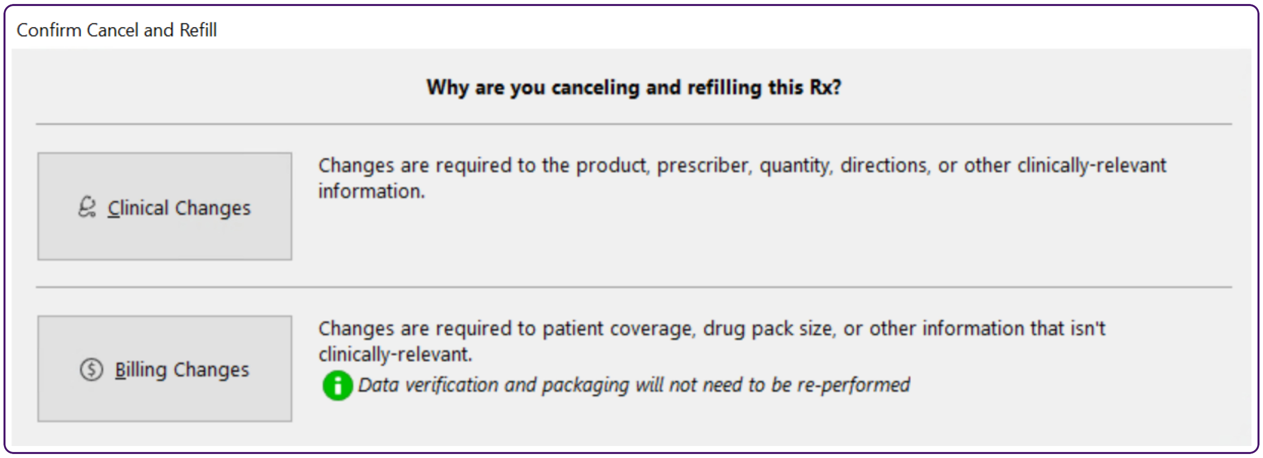
If the cancelled drug was never filled, you are prompted to determine what to do with the prescription.



- Select **Make this Rx Unfilled** to keep the prescription on file.
- Select **Filled in Error - Remove from profile** to remove the prescription from the patient's profile. You can copy some of the information of the cancelled prescription over to a new prescription.

Confirm Cancel and Refill

If you select **Cancel and Refill**, you will need to determine the type of change you need to make.



- Select **Clinical Changes** to correct a prescription's clinically-relevant information, such as the drug, prescriber, quantity, directions, SIG, or insurance information.

  The new or modified prescription will need to go through the workflow again.
- Select **Billing Changes** if the price of the drug has changed, and you need to manually adjust it. Do not select this button to change patient coverage, as this workflow does not re-trigger adjudication.

Options

In most cases, making a change to a work order impacts the invoice. If the invoice is impacted, the **Select an option to continue** dialog box is displayed, offering you the following four options:

- Select **Leave invoice open** if you have multiple changes to do to the work order.
- Select **Post invoice (or Post and consolidate invoice(s)** if you have completed the invoice.

  Kroll ensures all the invoices in the work order correspond to the desired outcome. If the invoice was not paid, the former invoice is deleted and replaced by a new invoice. If the invoice was paid, it remains on file and a new invoice with the adjusted amount is posted.

  The new invoice is added to the **Invoices** tab, and the new invoice is reflected in PharmaConnect. The patient receives a new notification.
- Select **Send Rx to Trouble** if you want to confirm the changes before posting them.

  The invoice will not be posted.
- Select **Back to Rx** to return to the prescription. You will not be able to make changes to the prescription. The invoice will not be posted.

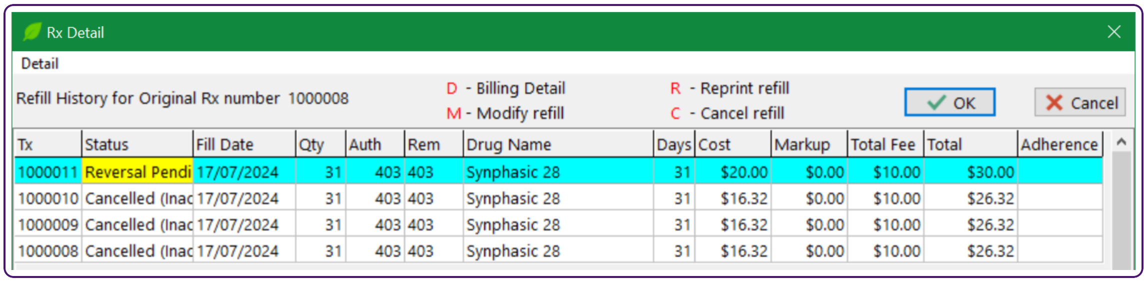
D-Detail

You can use the **Detail** command to view adjudication details for a prescription. This command is useful for identifying and resolving pricing issues.

To view prescription details:

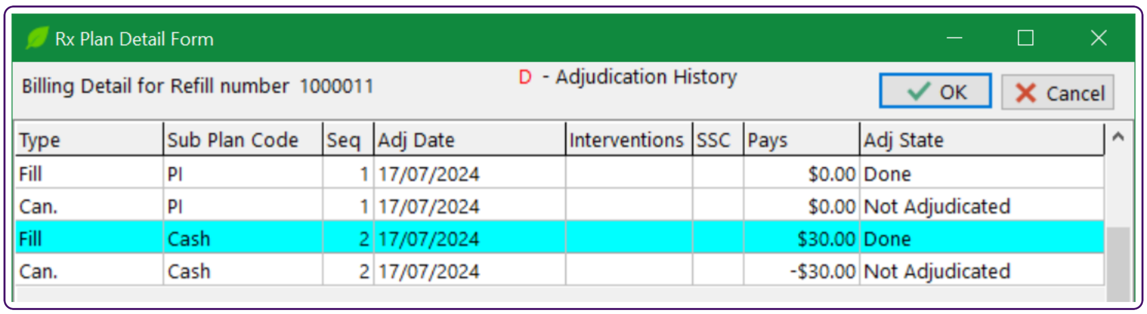
1. Highlight or tag the applicable prescription(s).
2. Press **D** or select **D - Detail**.

   The **Rx Detail** pop-up is displayed. It displays all of the transaction numbers (Tx Number) used with the original Rx.

3. To view the RX Plan Detail Form for a specific TX number, select a row and press **D** or select **D-Billing Detail**.

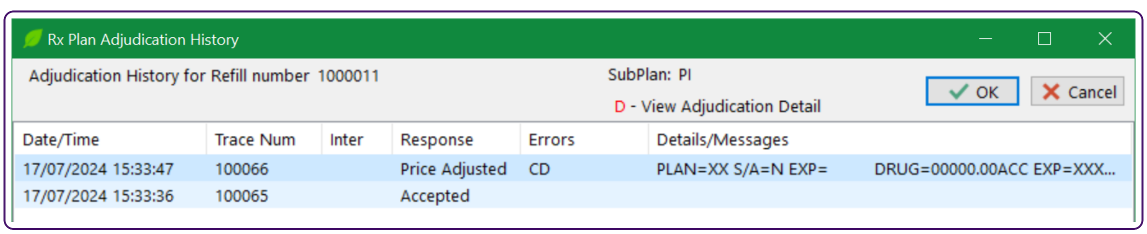
   This window breaks down the amounts paid by each third party payer for the Rx selected.

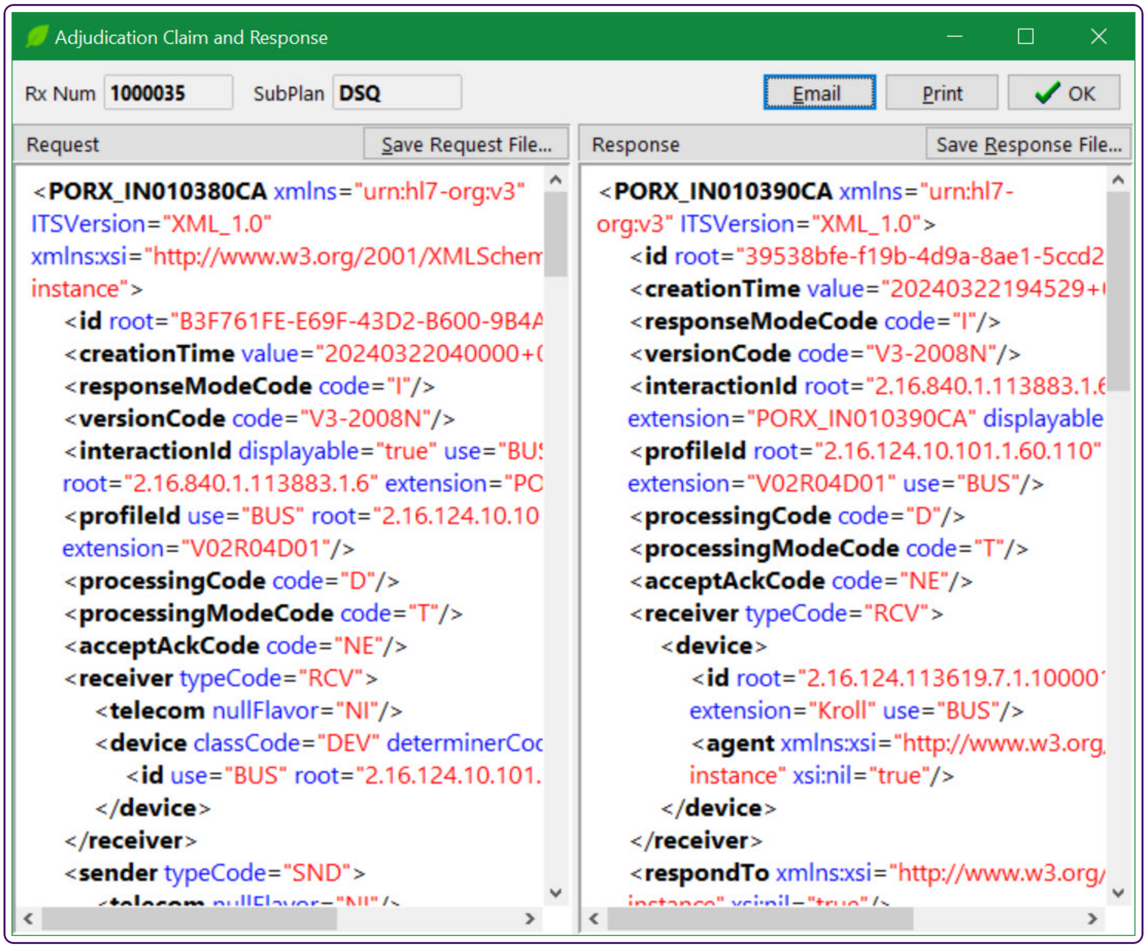
   Cash rows identify patient pays amounts.

4. To view the **Rx Plan Adjudication History** pop-up, select a third party plan entry, and press **D** or select **D- Adjudication History**.

   The **Rx Plan Adjudication History** pop-up shows the details and messages sent back from the third party plan.

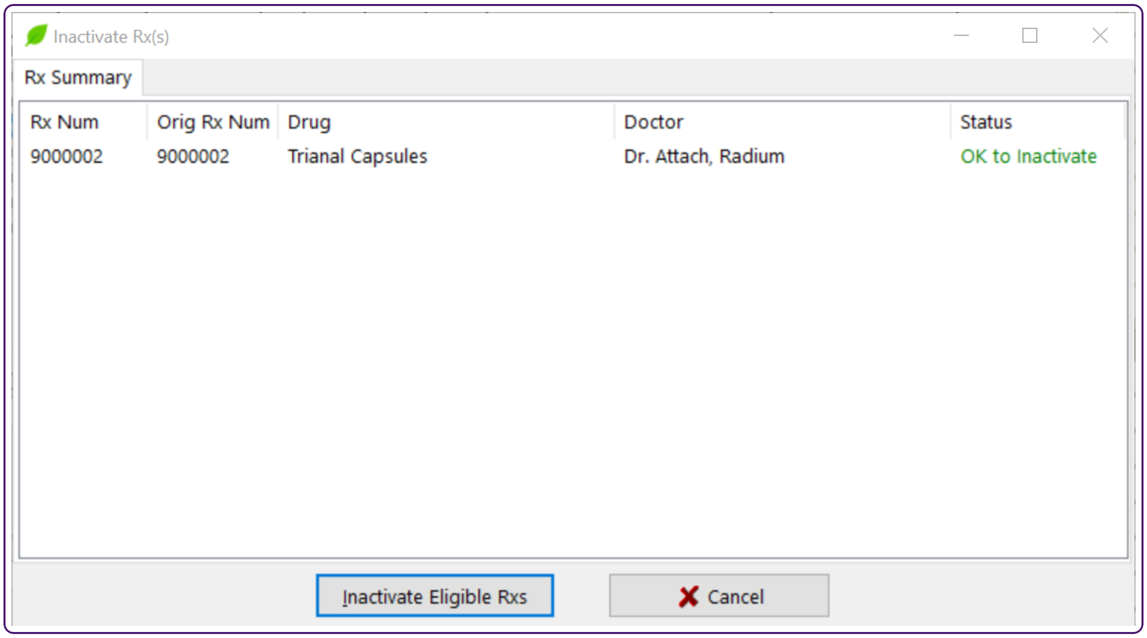
5. To display the **Adjudication Claim and Response Form**, press D or select **D-View Adjudication Detail**. The left side of the window, **Claim Values**, shows all the values being sent to the third party payer. The right side of the window, **Response Values**, shows all the values and messages sent back from the third party payer.



I-Inactivate

1. Highlight or tag the prescription(s) to be inactivated.
2. Press **I** or select **I-Inactivate**.

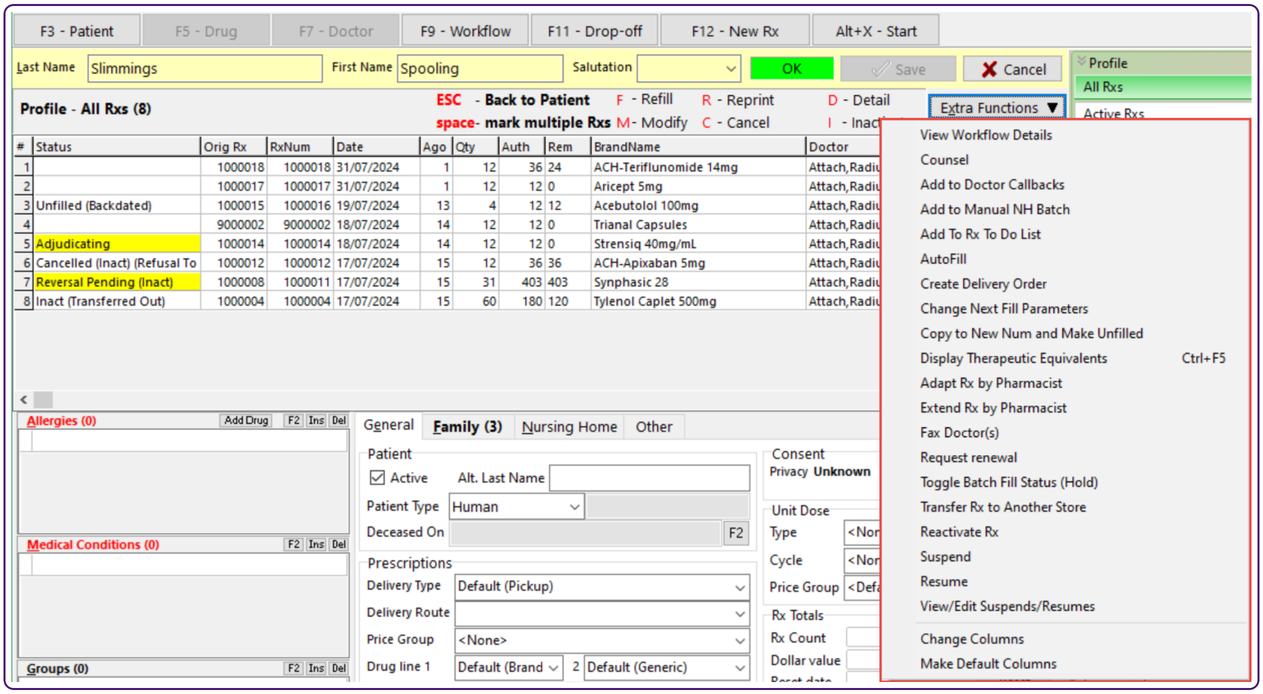
   The **Inactivate Rx(s)** pop-up is display.



Inactivated prescriptions can be reactivated by selecting **Extra Functions** > **Reactivate**.

Extra Functions

You can select the **Extra Functions** button on the patient profile to access less-frequently used commands.



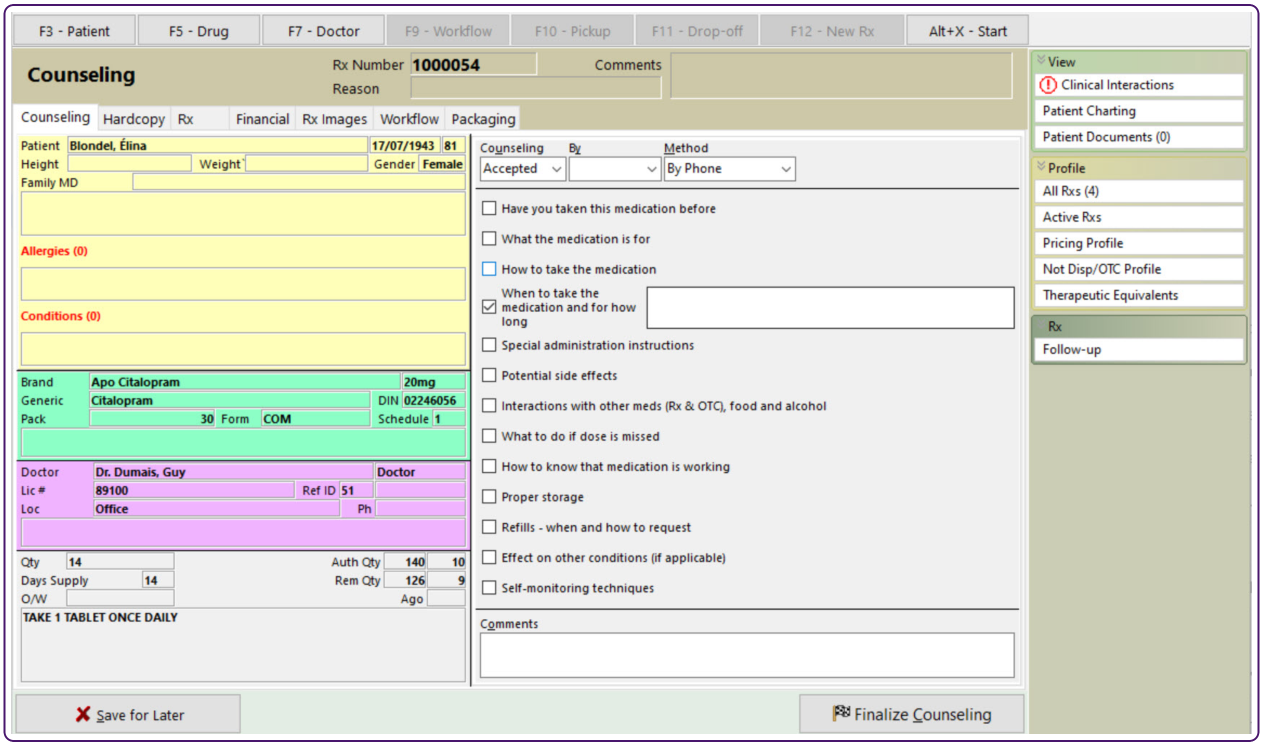
View workflow details

You can use the **View workflow details** function to view and print the steps associated with a specific prescription.

Counsel

You can use the **Counsel** function to indicate whether the patient accepted or rejected counselling, and to enter information about the counselling that was provided or the reason counselling was rejected. When you select this tab, a series of questions are presented for you to answer.

The following image shows the Counsel tab after you confirm that the patient did accept counselling, and indicate who the counselling was received by, and indicate where or how it was received (in person, by phone, or virtual).

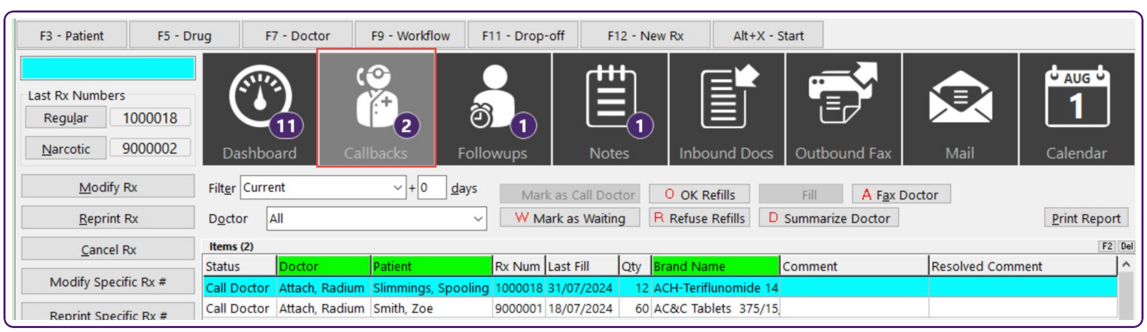


Add to Doctor Callbacks

You can use the **Add to Doctor Callbacks** function to add a reminder to the **Callbacks** window to call the doctor regarding a specific prescription. This callback reminder may serve to clarify prescription dosage, SIG instructions, refills etc.

1. Highlight or tag the prescription(s) from the patient profile.
2. Select **Extra Functions** > **Add to Doctor Callbacks**.

   The prescription is added to the **Alt+X - Start** screen with a Status of **Call Doctor**.



3. To view and resolve a callback, double-click it on the list.

Add to Manual NH Batch

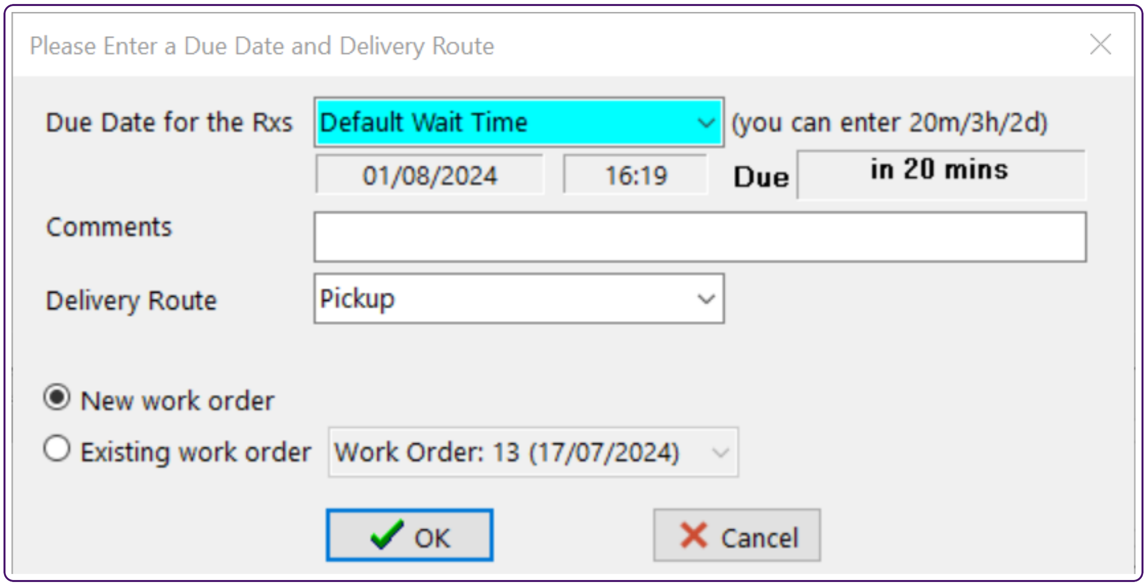
You can use the **Add to Manual NH Batch** function to add the selected Rxs to the batch order for the nursing home where the patient resides.

Add to Rx To Do List

You can use the **Add to Rx To Do List** function to quickly create a work order for refill prescriptions, and indicate when the work order is due. This function is useful if a patient arrives at the pharmacy to refill their prescriptions.

1. Highlight or tag the prescription(s) from the patient profile.
2. Select **Extra Functions** > **Add to Rx To Do List**.

   The **Please Enter a Due Date and Delivery Route** pop-up is displayed.

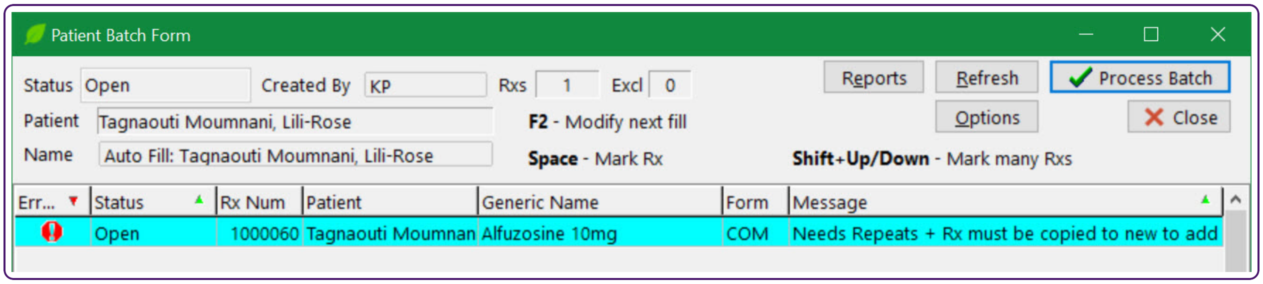
   

3. Use the default **Due Date for the Rxs** or select Specific Time, then enter a number of days and a time.
4. Select whether to create a **New work order** or add the refill to an **Existing work order**.
5. Select **OK**.

   The refill(s) are prioritized against all other existing work orders in the system and presented to you for processing at each applicable Rx stage.

AutoFill

You can use the **AutoFill** function to automatically fill the selected Rxs.



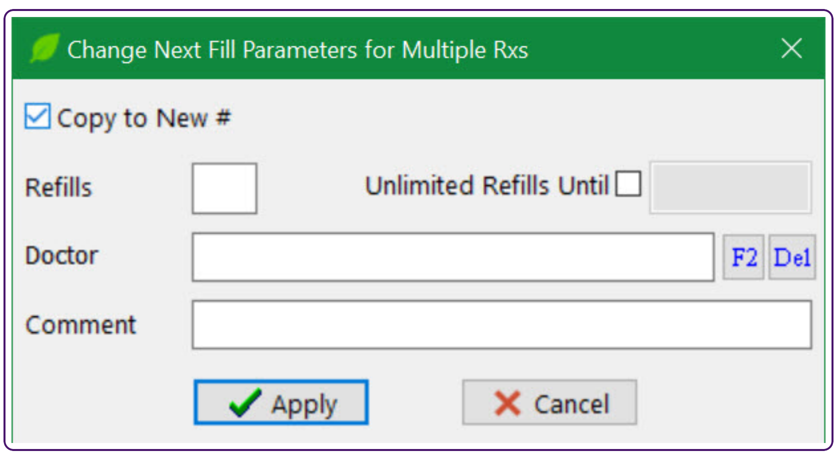
Create Delivery Order

You can use the **Create Delivery Order** option to add the selected Rxs to a delivery order.

For more information, see the *Pharmacy Delivery Guide*.

Change Next Fill Parameters

You can use the **Change Next Fill Parameters** function to change the parameters applied to the next refill of the Rx.

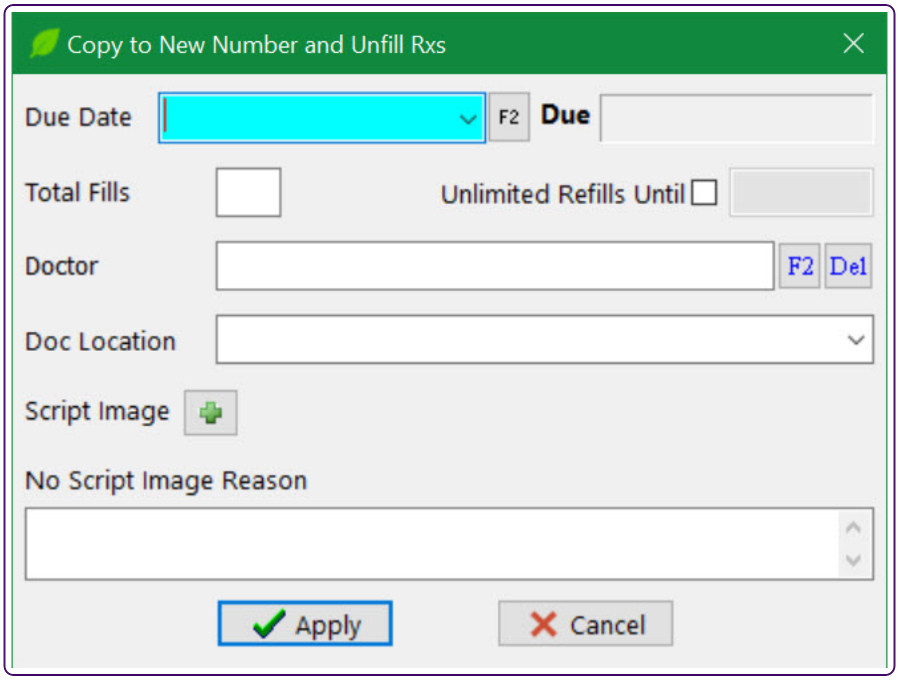


The following table describes the fields on the **Change Next Fill Parameters for Multiple Rxs** pop-up.

Name	Description
Copy to New #	If selected, the Rx is copied and the new parameters applied to the copy.
Refills	The number of refills
Unlimited Refills Until	If selected, you can enter the date until which the refills expire.
Doctor	The prescribing doctor. This field is enabled when you select **Copy to New #**.
Comments	Any optional comments.

Copy to New Num and Make Unfilled

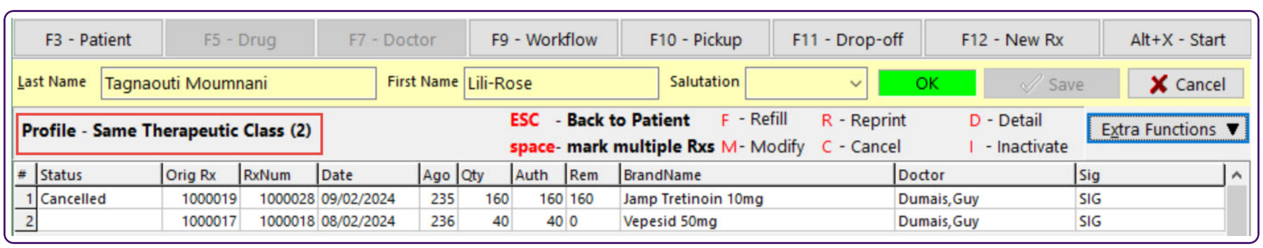
You can use the **Copy to New Num and Make Unfilled** function to copy a selected Rx to a new Rx number and mark it as unfilled. You can then modify the copy and action it as needed.



Display Therapeutic Equivalents

The **Display Therapeutic Equivalents** function enables you to highlight a prescription from the patient profile and display any therapeutic equivalents the patient may have had in the past.

The patient profile only displays therapeutic equivalents for the prescription that was initially selected.



Adapt Rx by Pharmacist

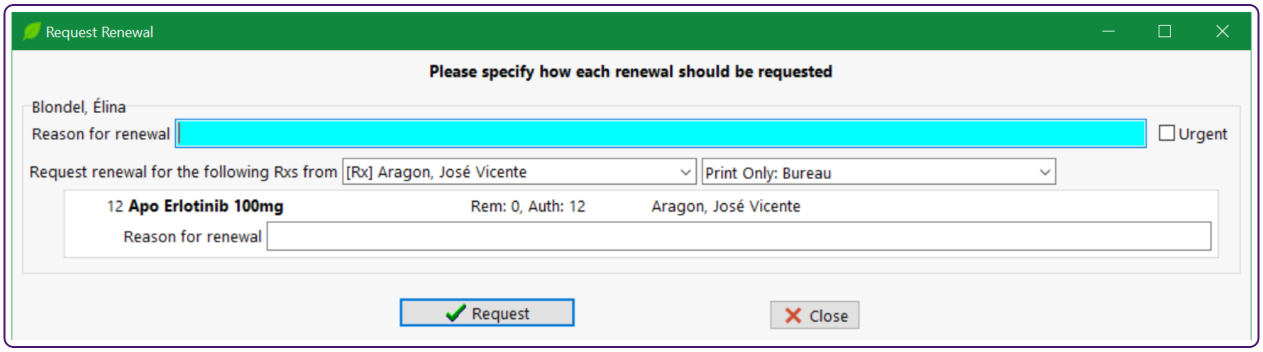
For information on the Adapt Rx by Pharmacist function, please visit the Kroll website and select the appropriate **Rx adaptation and Rx extension guide** from the **Downloadable documentation and guides** > **Provincial user guides**.

Extend Rx by Pharmacist

For information on the Extend Rx by Pharmacist function, please visit the Kroll website and select the appropriate **Rx adaptation and Rx extension guide** from the **Downloadable documentation and guides** > **Provincial user guides**.

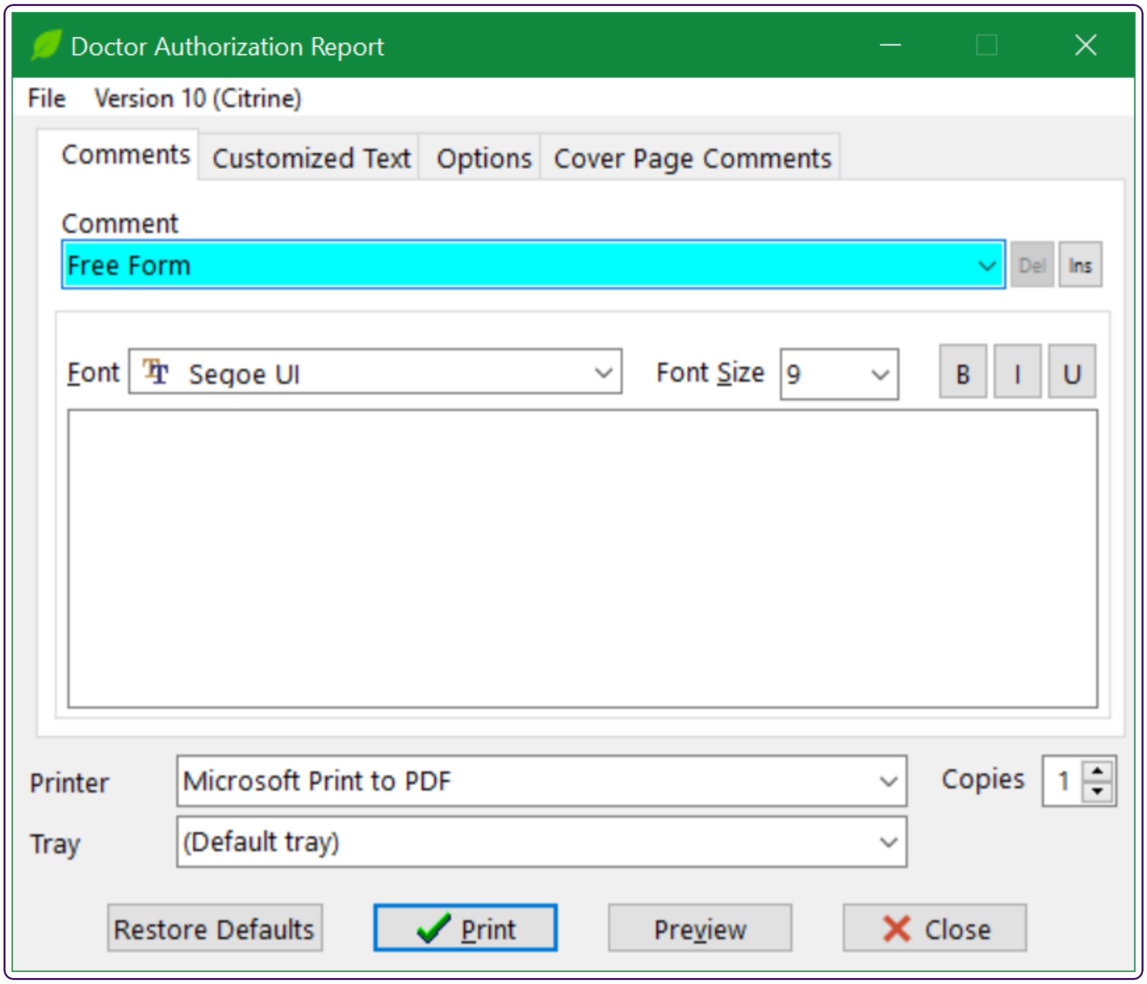
Request Renewal

The **Request Renewal** function enables you to request a renewal on behalf of the patient. You can send this request to the prescribing doctor or another doctor.



1. Enter the renewal information, then select **Request**.

   The **Doctor Authorization Report** is displayed.



2. Complete the report, then select **Print**, and send it to the doctor.

Toggle Batch Fill Status (Hold)

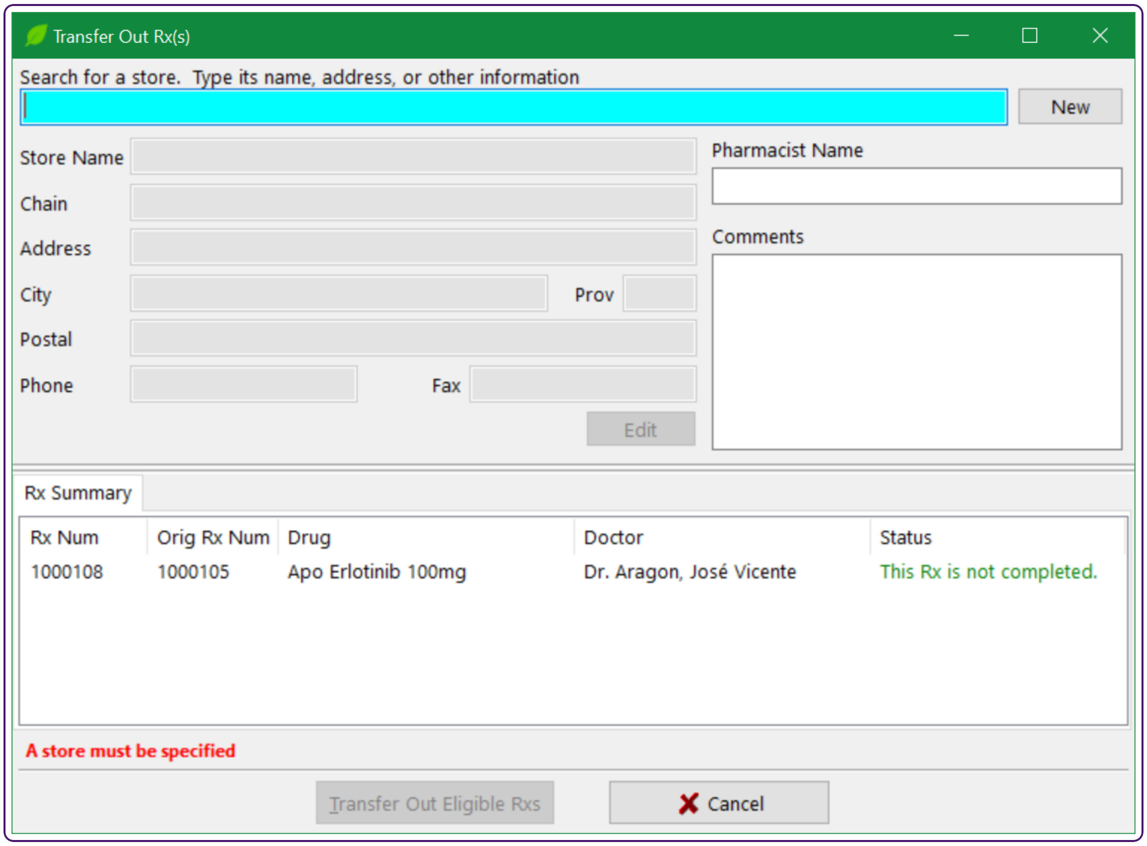
You can use the **Toggle Batch Fill Status** function to turn batch filling on or off for the selected Rxs. This function applies only to patients in nursing homes.

Transfer Rx to another store

To transfer an Rx to another store:

1. Select the prescriptions you want to transfer to another pharmacy.
2. Select **Extra Functions**> **Transfer Rx to Another Store.**

   The **Transfer Out Rx(s)** window is displayed.



3. Search for and **Select** the pharmacy to which you want to transfer the Rx.

   The pharmacy's address and contact information are added to the window.

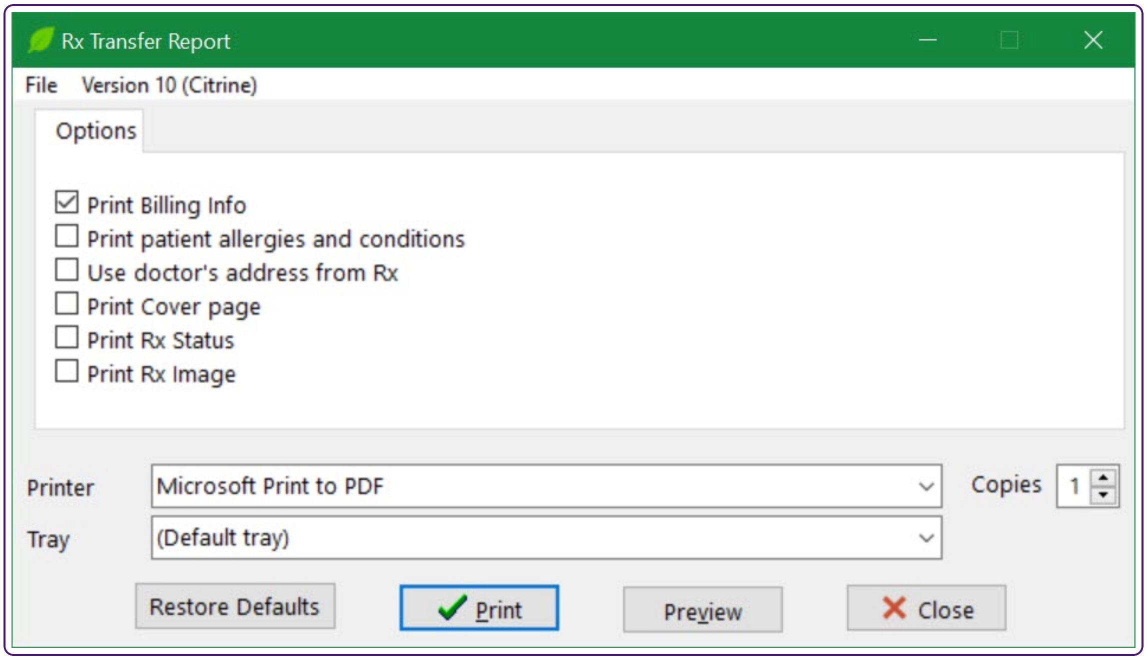
   > To insert a new pharmacy record, select **New**, complete the **Create Store** form, then enter the pharmacy information and select **OK**.

4. Optionally enter the **Pharmacist Name** and **Comments**.

5. Select **Transfer Out Eligible Rxs**.

   A prompt is displayed, asking you if you want to print the transfer report.

   If you select **Yes**, the **Rx Transfer Report** popup is displayed.



6. Select the information you want included on the report, then select **Print**.

   The **Status** of the Rx is updated to show Inact (Transferred Out).

Reactivate Rx

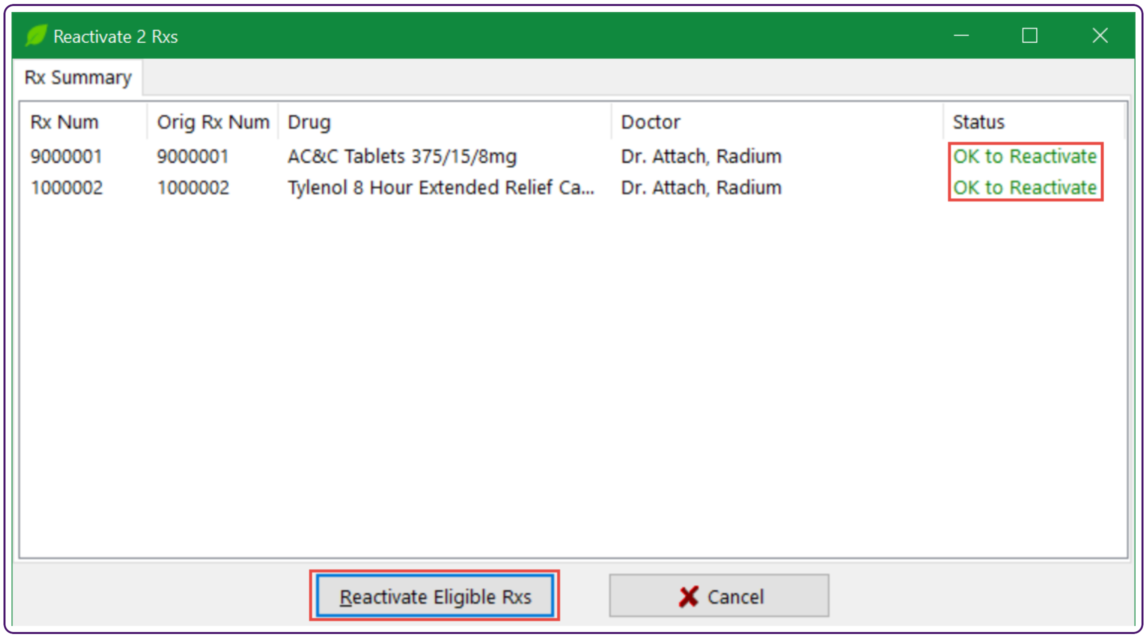
You can use the **Reactivate** function to reactivate inactive prescription(s). Be careful when reactivating a prescription; be sure you know why the Rx was inactivated to avoid dispensing errors.

1. Use the space bar to select the prescription you want to reactivate.
2. Select **Extra Function** > **Reactivate Rx**.

   The **Reactivate Rx** window is displayed.

3. Select **Reactivate Eligible Rxs** or press Enter.

   The prescriptions with a status **OK to Reactivate** are reactivated.



Suspend

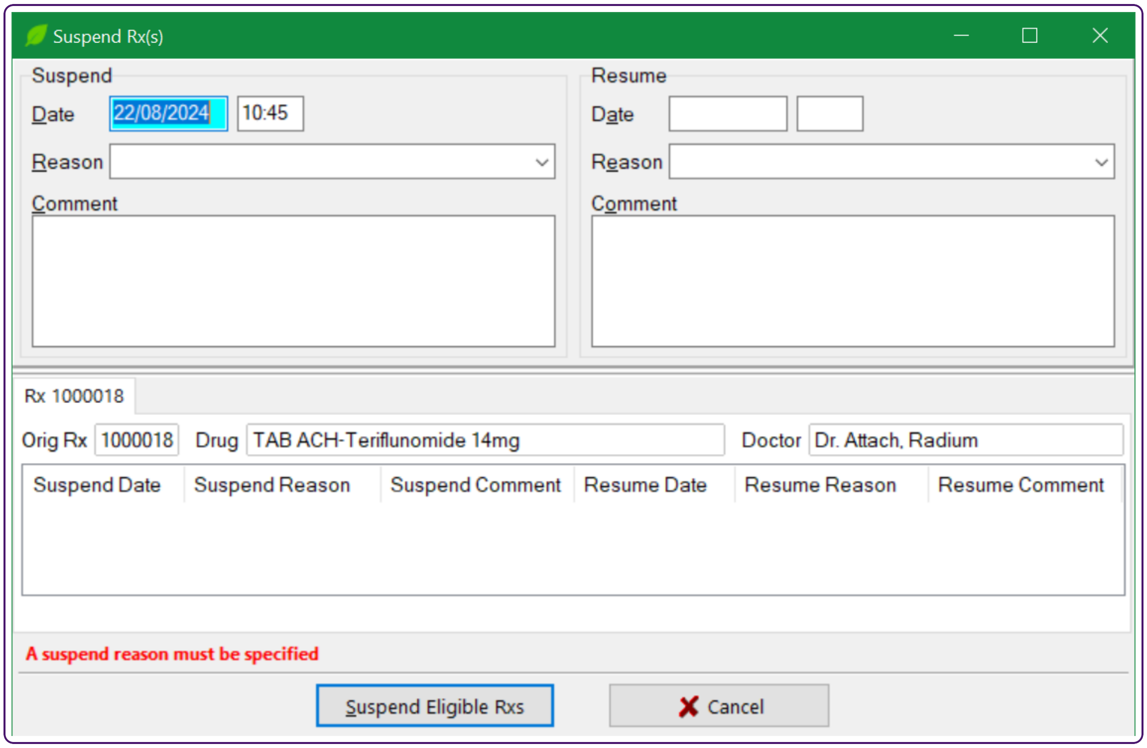
You can use the **Suspend** function to stop prescriptions from being filled or appearing on reports (including all blister packaging reports) for a specific amount of time, or indefinitely. Suspended prescriptions can be filled interactively if needed; however, you will be unable to adjust the dispensed quantity since it is not known when the patient started taking the medication for this fill. During an interactive fill, you will receive a warning that the Rx is suspended.

An active prescription can be suspended for many reasons, including drug-to-drug interactions and hospital admission.

Rxs with the following statuses cannot be suspended: Inactive, Inactive (Copied), Inactive Transferred Out, Fee for Service, Stock Transfer, or Unfill).

1. Use the space bar to select the prescription you want to suspend.
2. Select **Extra Function** > **Suspend**.

   The **Suspend Rx(s)** window is displayed:

   If more than one Rx is being suspended, the first tab shows an **Rx Summary** that lists all of the prescriptions selected for the suspend action. Subsequent tabs display information specific to the Rx number listed on the first tab. The details for the selected prescriptions are displayed at the bottom of the window.
3. In the **Suspend** section, enter the **Date**, **Time**, and **Reason** for suspending the Rx(s).

   To suspend an Rx indefinitely, do not specify a **Date** or **Time**.
4. Select a **Reason** from the drop-down list or enter a text reason in the same field.
5. Optionally enter a **Comment**.
6. Select **Suspend Eligible Rxs**.

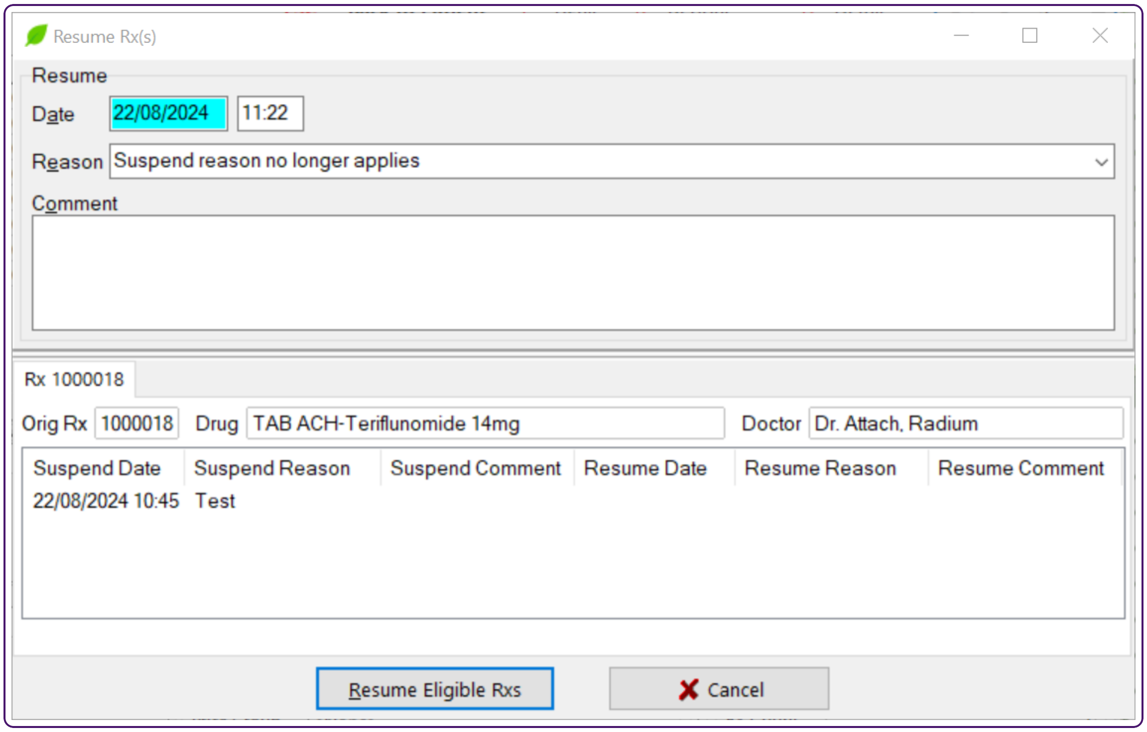
   Prescriptions with a status of **OK to suspend** are suspended. Their **Status** now shows Suspended.

Resume

Only prescriptions with a status of Suspended can be resumed.

1. Use the space bar to select the suspended prescription you want to resume.
2. Select **Extra Function** > **Resume**.

   The **Resume Rx(s)** window is displayed:



3. Select the **Date**, **Time** and **Reason** for resuming the Suspended Rx.
4. Select a **Reason** from the drop-down list or enter a text reason in the same field.
5. Select **Resume Eligible Rxs** or press Enter.

   The prescriptions with a status of **OK to Resume** become active again.

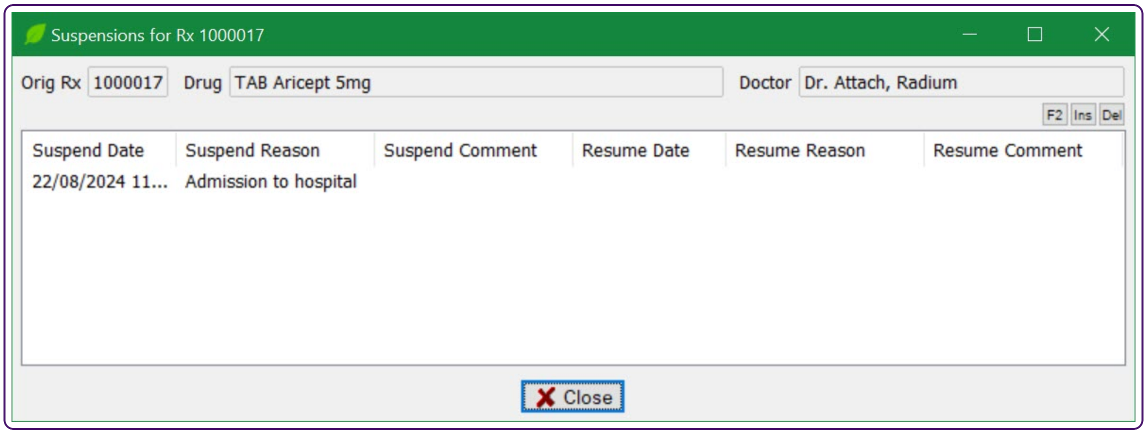
View/Edit Suspends/Resumes

You can view or edit the suspend/resume history for a specific prescription.

You can only delete suspensions with future suspend dates.

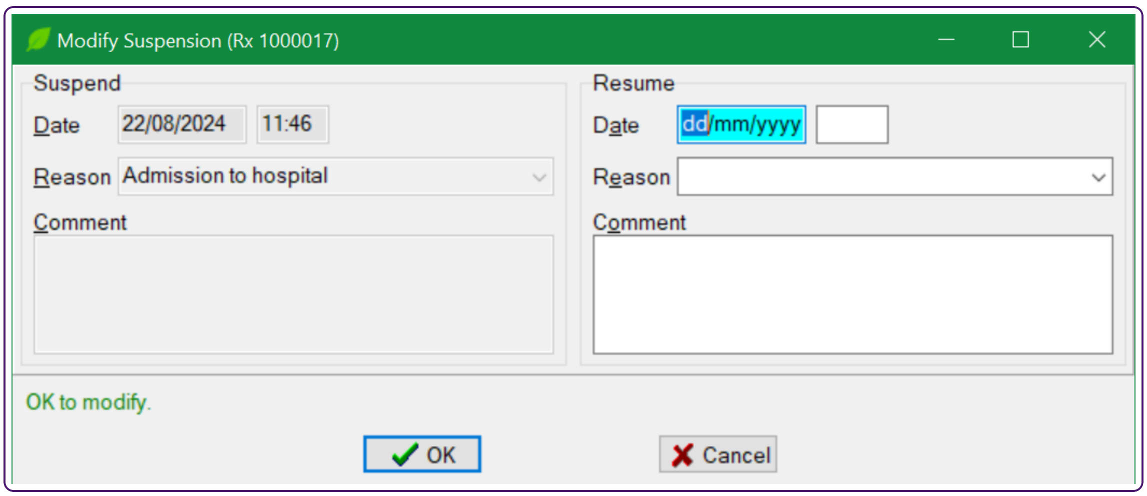
1. Use the space bar to select the applicable prescription.
2. Select **Extra Functions** > **View/Edit Suspends/Resumes**.

   The **Suspensions for Rx [number]** window is displayed.



3. To edit an existing suspend/resume entry, double click the entry or highlight it and press F2.

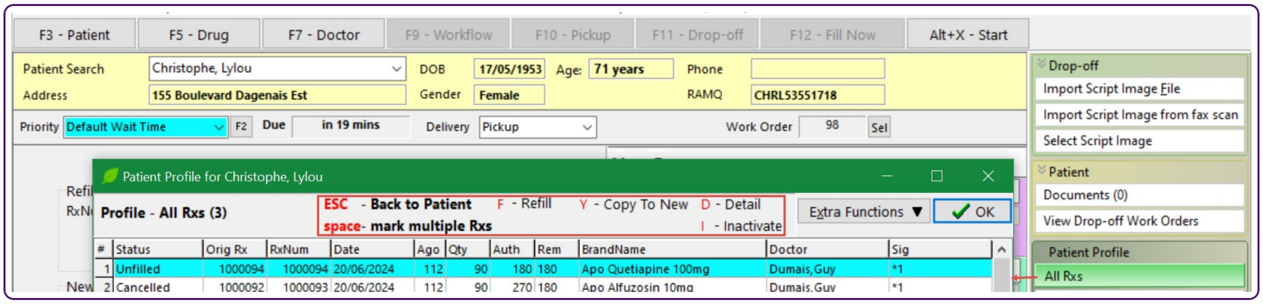
   The **Modify Suspension** window is displayed.



4. Update the information as applicable, then select **OK**.

Patient profile commands from the **F11 - Drop-Off** window

Six key commands can be executed from the **F11 - Drop-Off** window. These commands act on the highlighted or tagged prescription(s) in the patient profile.

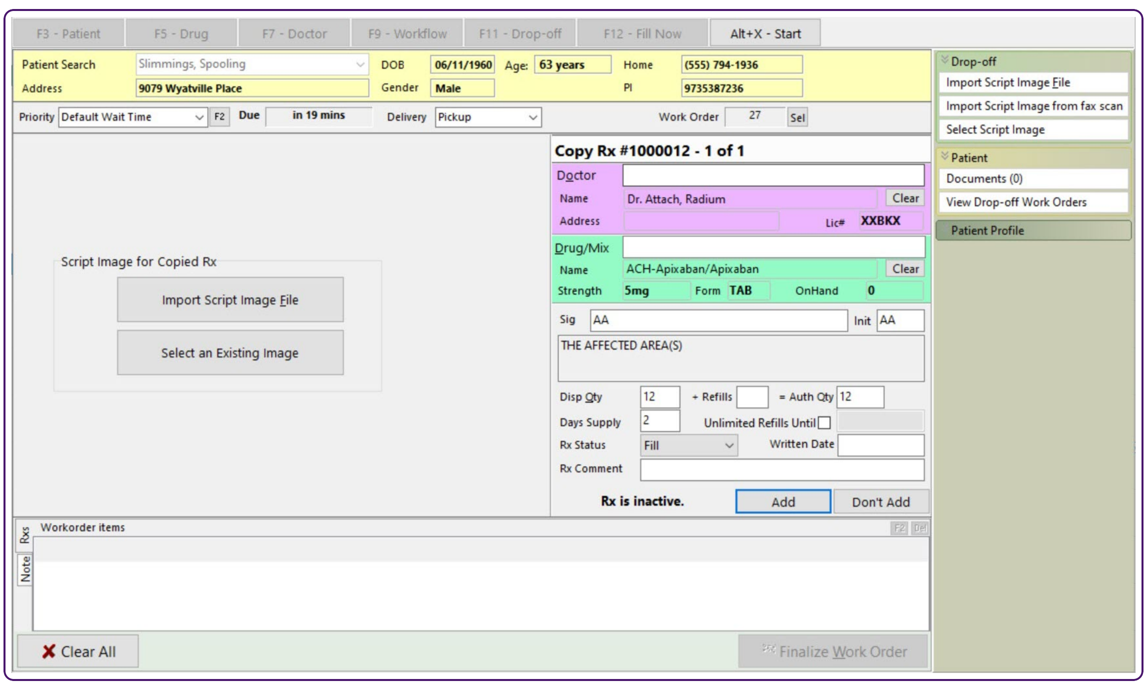


Command	Description
Esc	Back to patient.
Space	Mark Multiple Rxs
D	Detail prescription(s)
Y	Copy to new prescription
F	Refill prescription(s)
I	Inactivate prescription(s)

The following procedure describes how to copy to a new prescription number (or work order). For information on the other commands, see "Patient Profile commands" (page 78).

1. Use the space bar to select the prescription you want to copy to a new prescription number.
2. Press Y or select **Y-Copy To New**.

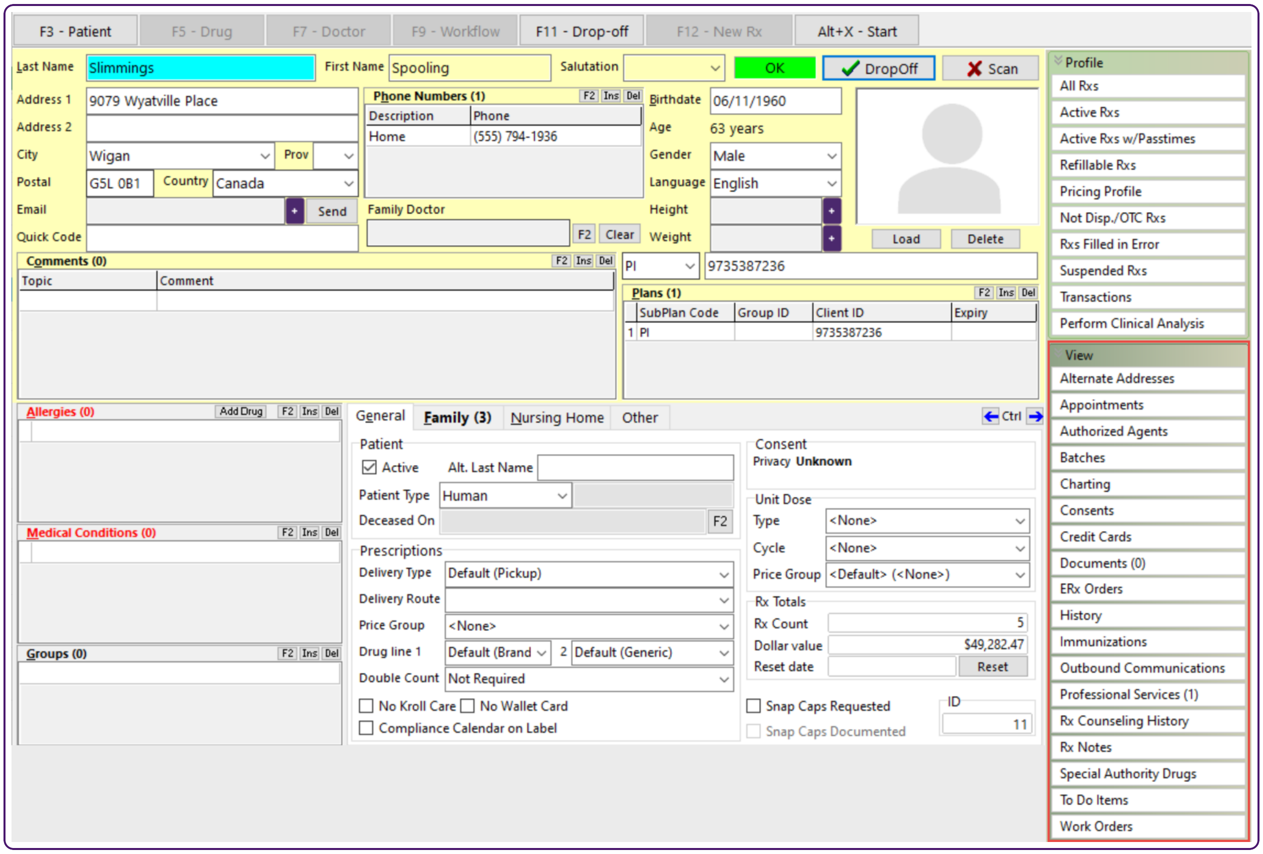
   The **F11-Drop-off** window is displayed. It is populated with prescription information from the Rx you copied.



3. After all of the prescriptions have been copied, select **Finalize Work Order** or press Enter to move the work order to the input stage.

Patient sidebar functions

This section describes those sidebar functions on the **F3 - Patient** window that apply to pharmacies.



Alternate Address

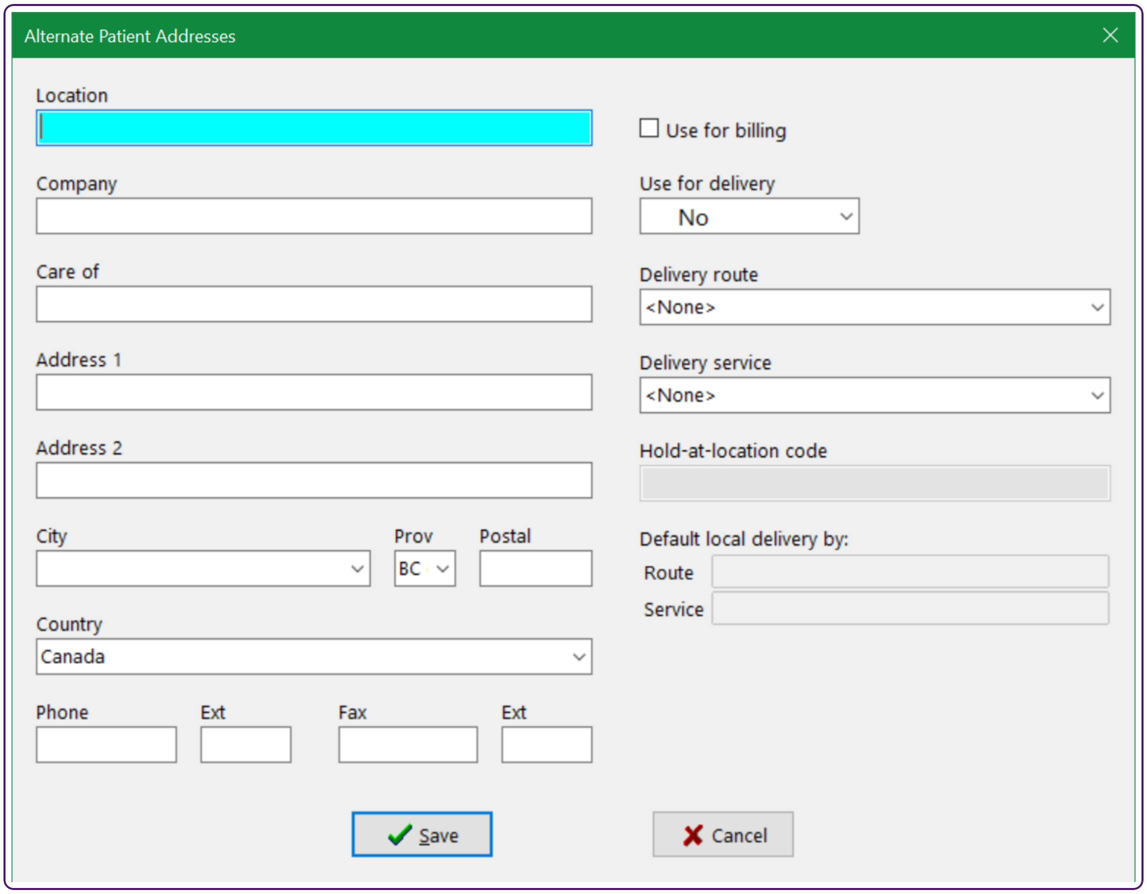
Use the **Alternate Addresses** function to add, edit, or delete a patient's secondary addresses.

1. Select **Alternate Addresses** from the patient sidebar.

   The **Alternate Patient Addresses** window is displayed.

2. Select **Ins**.

   The Alternate Patient Addresses window is displayed.



3. In the **Location** field, add a description of the new address, such as summer home or parent's home.

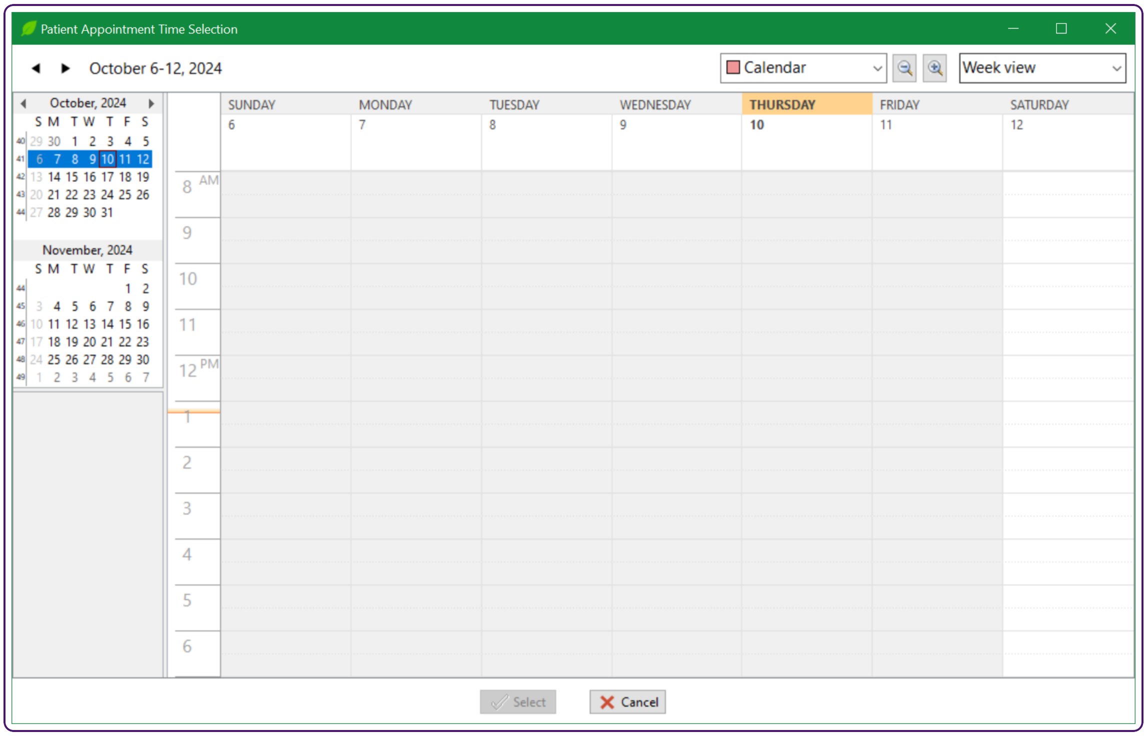
4. Complete the rest of the fields as required, then select **Save**.

Appointments

You can use the **Appointments** function to manage patient appointments.

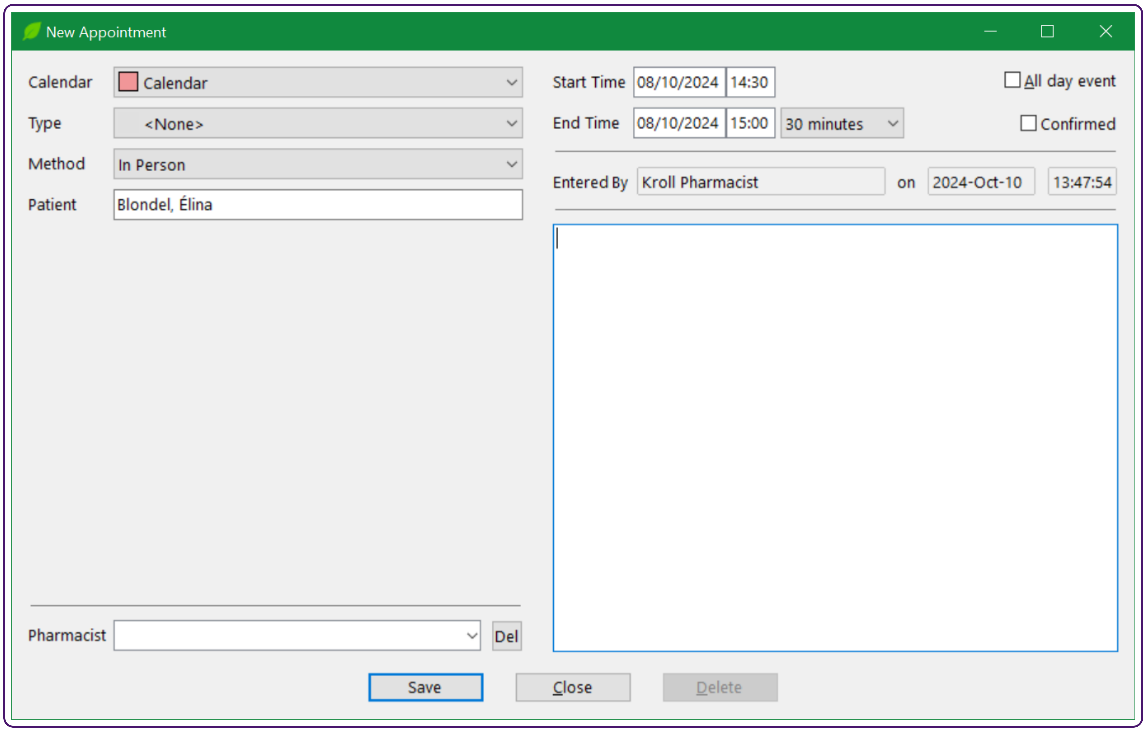
1. Select **Ins**.

   The **Patient Appointment Time Selection** window is displayed.



2. Select a time slot, then click **Select**.

   The **New Appointment** window is displayed.

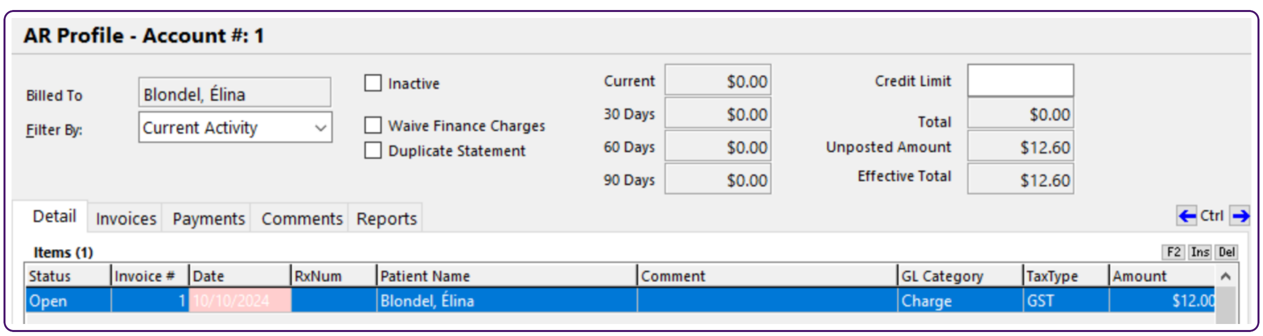


3. Enter the appointment information, then select **Save**.

   The appointment is added to the **Appointments** list.

AR Profile

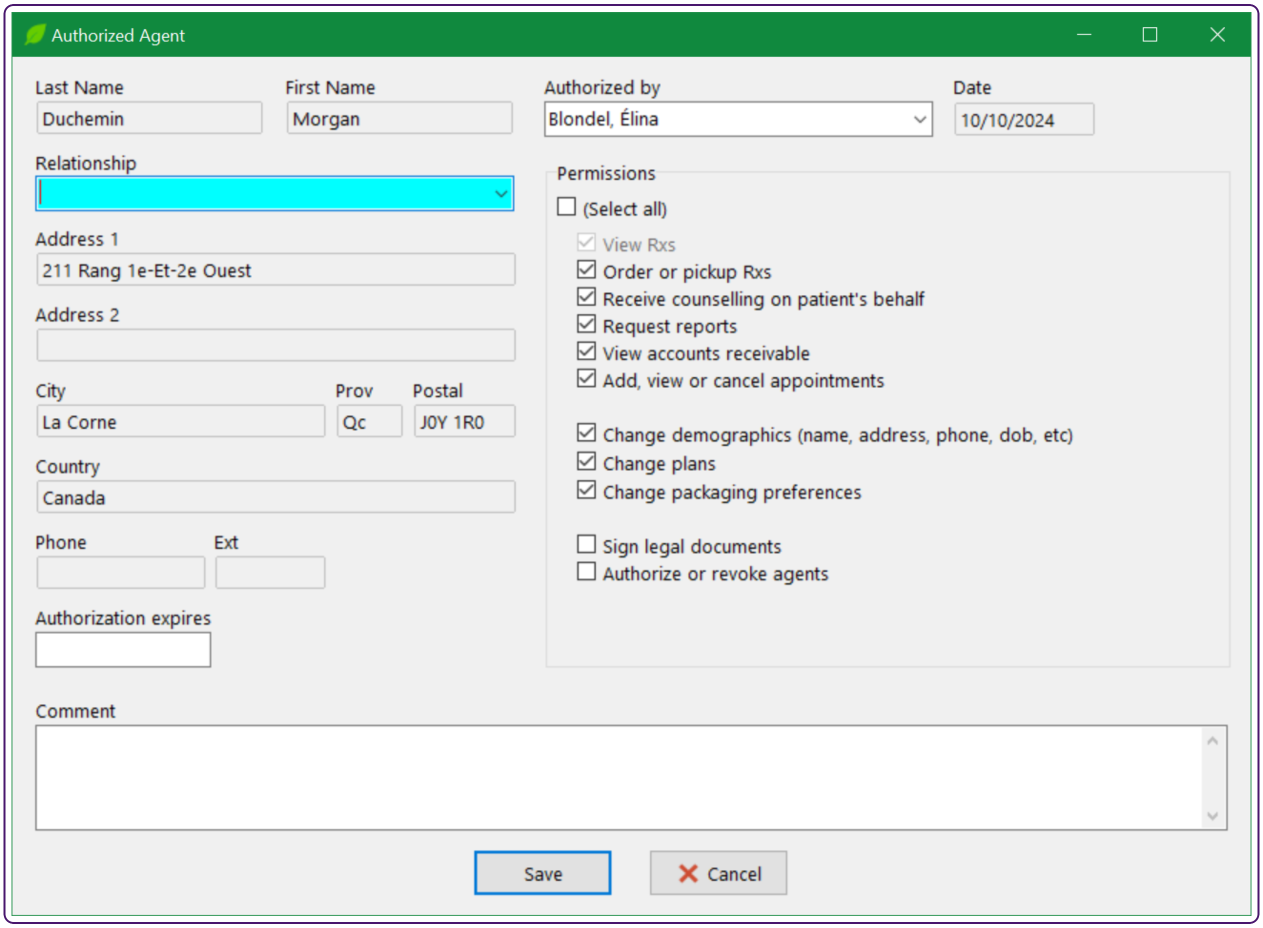
You can use the **AR Profile** function to view the patient's Accounts Receivable information. Accounts Receivable is a program that maintains the charges and payments made by customers within the store. You can view charges, print statements, and run reports to analyze the impact of the AR program within the store.



Authorized Agents

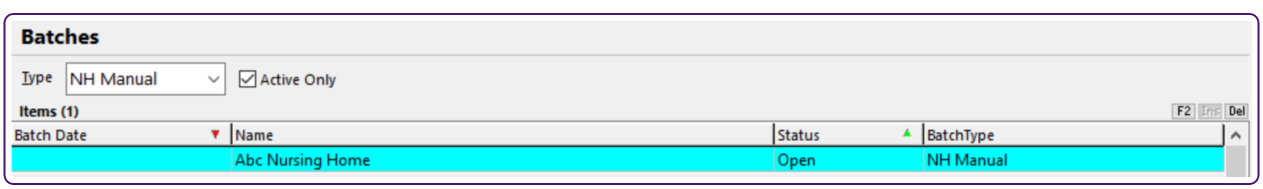
You can use the **Authorized Agents** function to view the individuals authorized to act on behalf of a patient. These agents must be registered in the system as patients.

Select Ins to display the **Authorized Agent** window, then select an authorized agent, enter their personal information, and select their permissions.

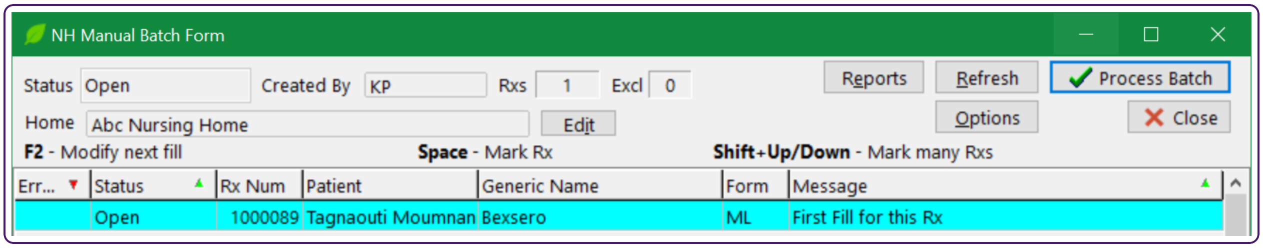


Batches

Batch filling is available to nursing home customers only. You can use it to fill Rxs belonging to a particular cycle in a single batch.



To view additional details about a batch, double click it.



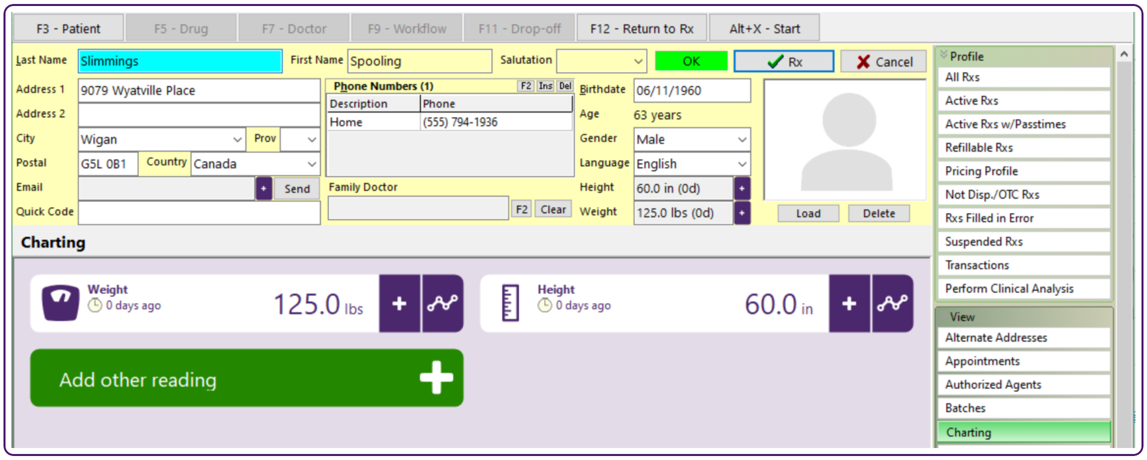
Charting

You can use **Patient Charting** to monitor and record patient health metrics directly within the pharmacy management system. The benefits of charting include the ability to print charts and electronically store patient health information in one area for ease of access.

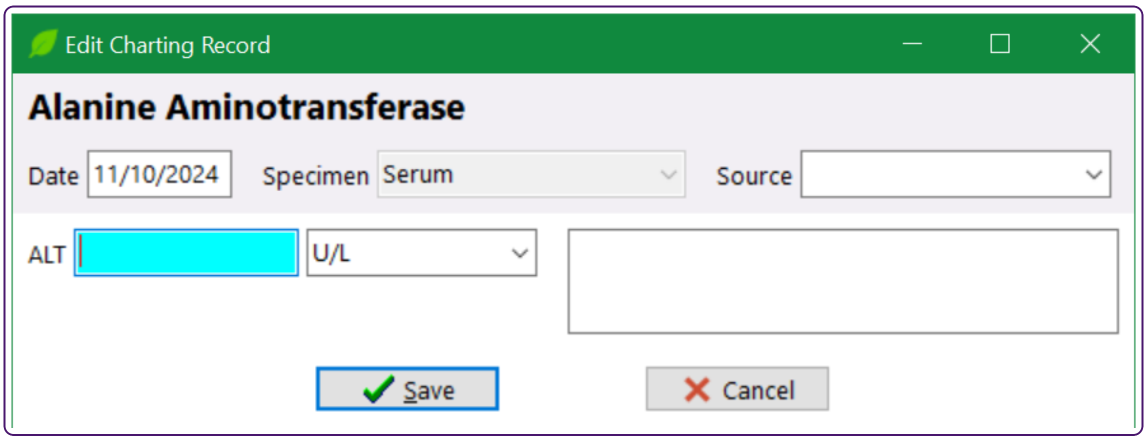
If an existing chart value has a comment attached, an asterisk is displayed to its right. To display the comment, place the mouse cursor over the asterisk.

To add a value:

1. Select **Add other reading** > **Other**, then select the type of charting value you want to add.



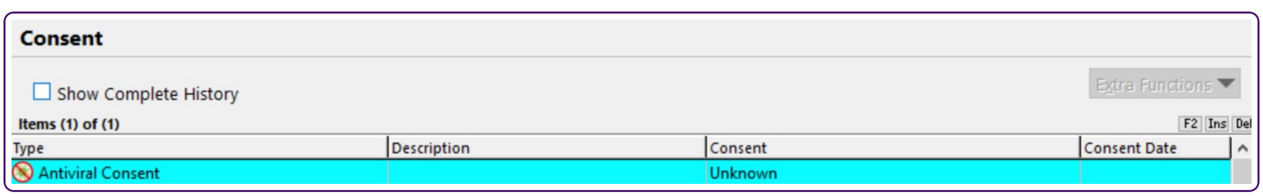
The **Edit Charting Record** popup is displayed. The fields it contains vary depending on the type of record you selected.



2. Complete the fields, then select **Save**.

Consents

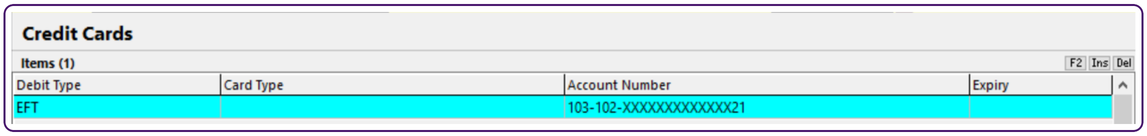
From the **Consent** window, you can record whether a patient has provided the pharmacy with the consents you have configured.

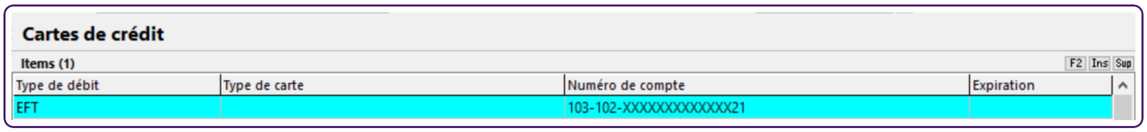


Credit Cards

The **Credit Cards** section is used to store patient EFT and credit card information. To enter credit card information, you must:

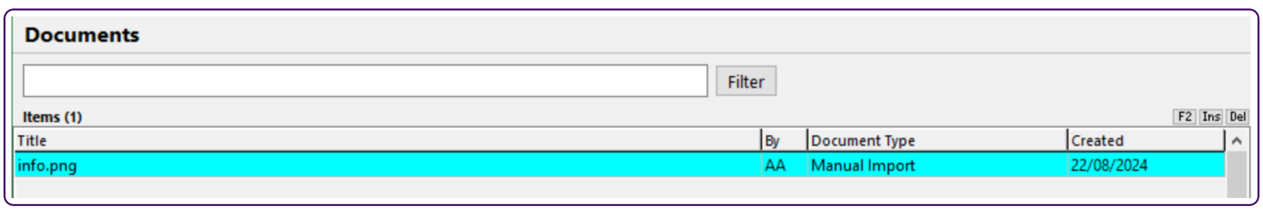
1. Be assigned to a user group that has permission to view credit card information.
2. Have the credit card access password.





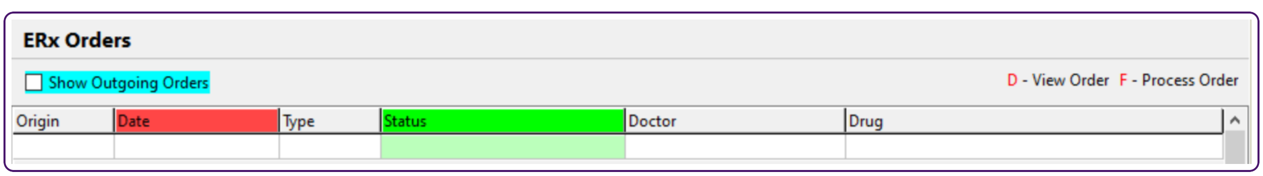
Documents

You can use the **Documents** function to import and attach external files, such as medical forms, medication charts and lab results, to specific patient records. The supported formats include .docx, .pdf, .xslx, and .jpeg.



ERx Orders

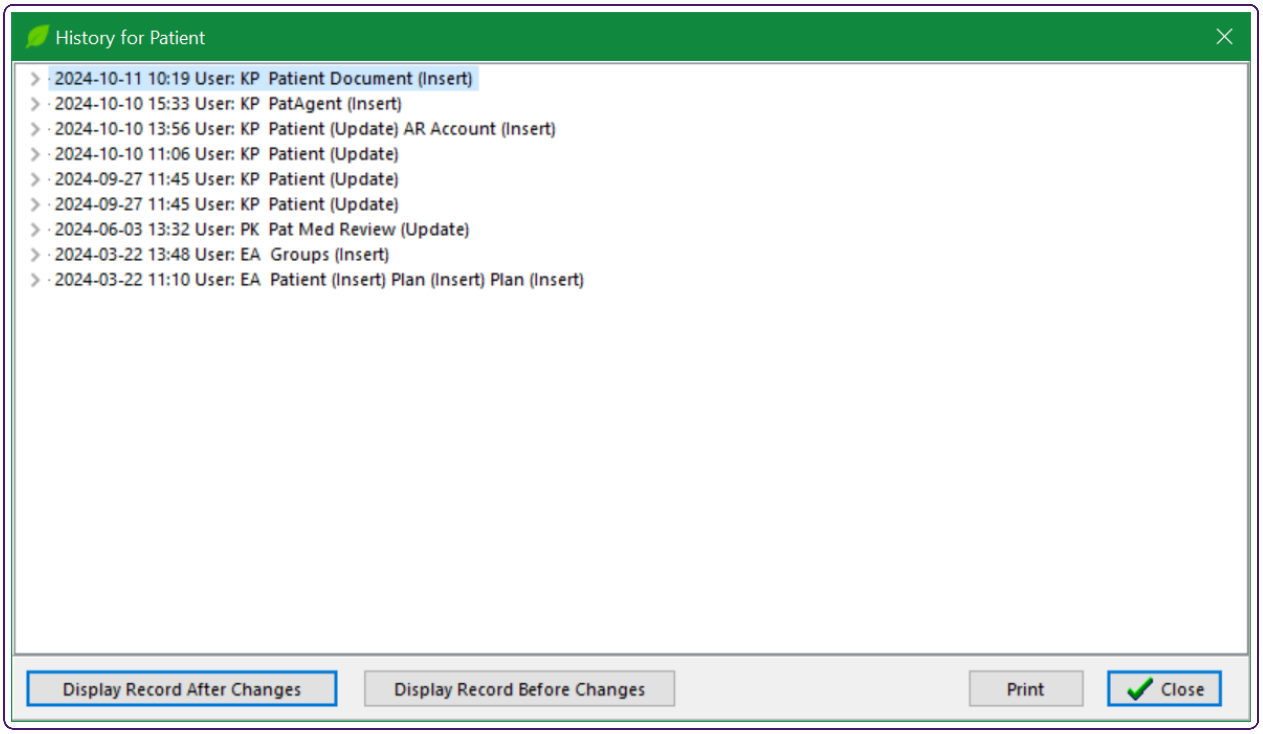
You can use the **ERx Orders** function to view and action prescription orders that were sent from an external application, such as PrescribeIT.



- Select **Show Outgoing Orders** to display the orders that will be sent to the external application.
- To view an order, press D, and to process it, press F.

History

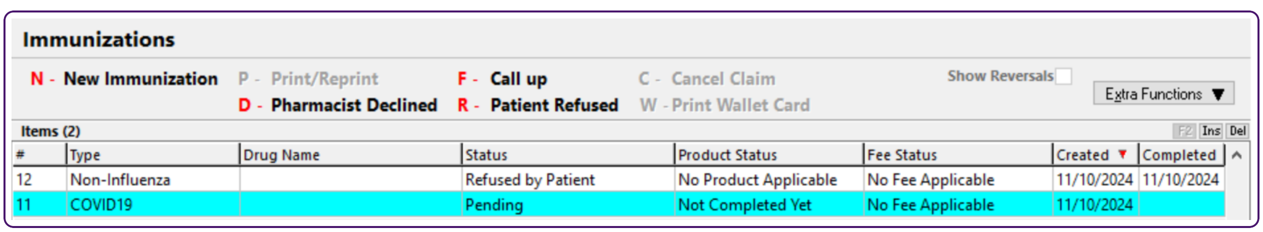
You can use the **History** function to track changes made to the patient record, including changes to third party plans, phone numbers, and addresses. The **History for Patient** window is read-only. It displays entries sorted by date and the initials of the user who executed the change.



- Select > to expand the details and select it again to hide them.
- To view what the patient profile looked like after or before a particular change was made, select a change record, then select **Display Record After Changes** or **Display Record Before Changes**, respectively.

Immunizations

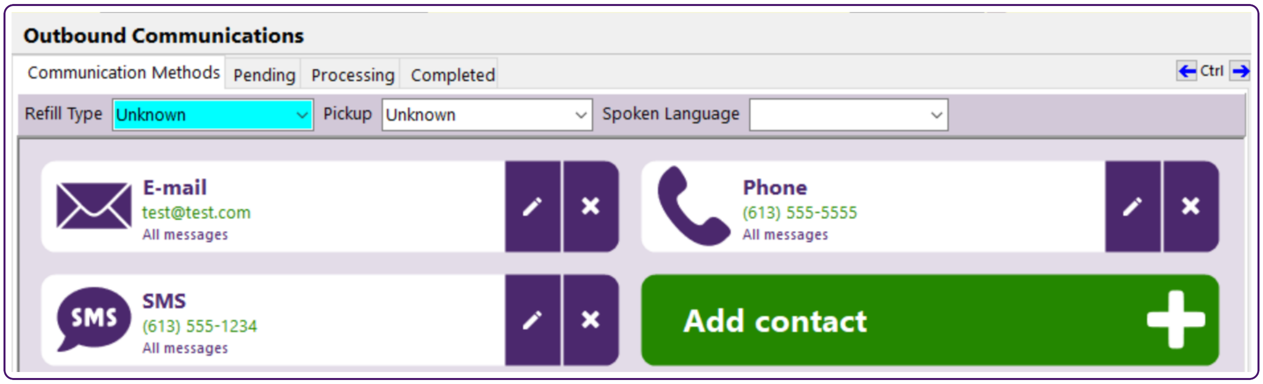
You can use the **Immunizations** function to manage patient immunizations.



You can use the commands at the top of this section, and those available from **Extra Functions** button, to add immunizations and perform actions on them.

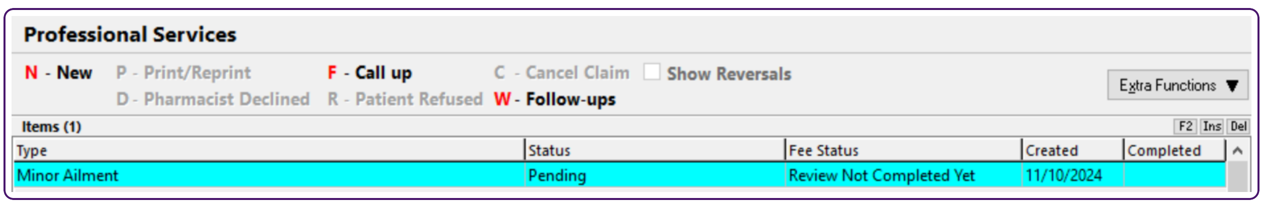
Outbound Communications

You can use the **Outbound Communications** function to manage communications with the patient, including whether their refill and pickup settings and the language they speak. You can also view their prior and pending communications.



Professional Services

You can use the **Professional Services** section to manage the medical services that you perform for patients, including general counseling, laboratory analyses, and the treatment of minor ailments.

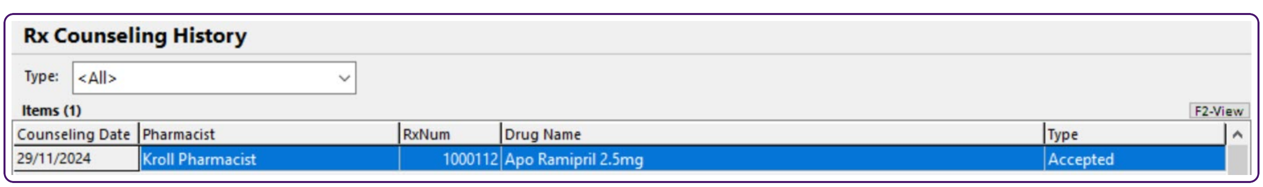


You can use the commands at the top of this section, and those available from **Extra Functions** button, to add services and perform actions on them.

Rx Counseling History

You can use the **Rx Counseling History** section to record the patient's Rx counseling sessions. Recording these sessions in the patient profile helps pharmacies meet the legal requirements for counseling documentation.

Use the **Type** menu to specify whether you want to view all Rx counseling sessions, or only those sessions that have been Accepted, Rejected, or performed on Paper.



Select **F2-View** to view the information for a selected counseling record.

Rx Notes

You can use the **Rx Notes** function to view the notes entered for all of the patient's Rxs. These notes are entered on the **Comments** tab of each Rx.

Rx Notes

Items (2) F2

Date	Pharmacist	Orig Rx...	Drug Name	Note
08/01/2025	KrollPharmacist	1000120	Abenol 650mg	Sample note.
08/01/2025	KrollPharmacist	1000063	Apo Citalopram 20mg	Sample note.

To view a note, double click a record or select it and then select F2.

To Do Items

The **To Do** section displays all outstanding callbacks and followups for the patient. You can also manually insert a to do item for a patient.

To Do

Filter Current + 0 days

Items (2) F2 Ins Del

Type	Status	Due Date	Brand Name	Doctor	Last Comment
Refill from Can		20/06/2024	Apo Alfuzosin 10mg	Dumais, Guy	
New Rx		04/10/2024	Act Bicalutamide 50mg	Abadie, Pascale	

Work Orders

The **Work Orders** section displays all of the patient's outstanding work orders.

Work Orders

Items (3) F2

WO #	Type	Created On	By	Note
88	Drop off	04/10/2024 10:43	KP	
67	None	20/06/2024 11:29	EA	
66	None	19/06/2024 13:54	EA	

Chapter 7

Drug records

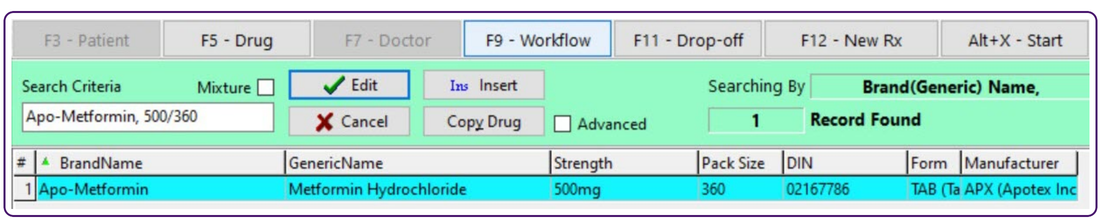
Drug records contain comprehensive information about how drugs should be stored, administered, handled, and priced.

This section explains how to perform drug searches and how to create and manage drug records.

Searching for a Drug

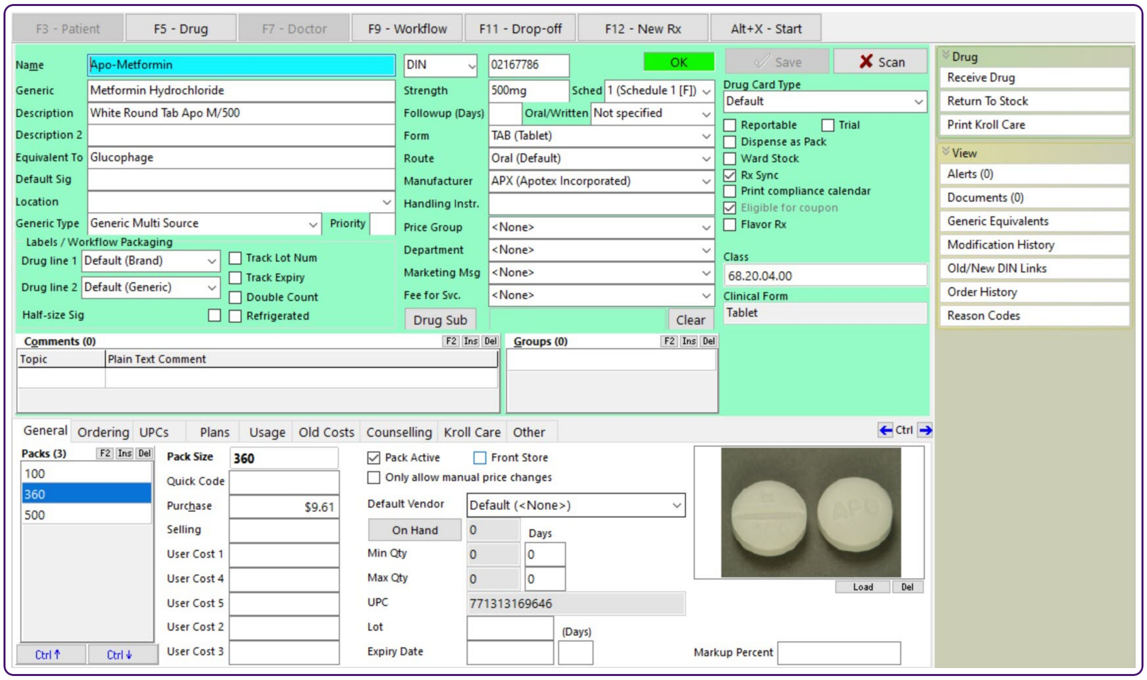
Method 1: From the F5 - Drug window

1. From the **Alt-X Start** window, select **F5 - Drug**.
2. Enter one of the following patient search criteria, then select **Search**:
   - Brand or Generic Name, Strength/Pack Size (e.g. Apo-Metformin, 500/360)
   - DIN (5-8 digits)
   - UPC (11-12 digits)
   - A period (.) and the Drug Quick Code (e.g. TYLE3)
   - # symbol and the Catalog Item Number (e.g. #78945)



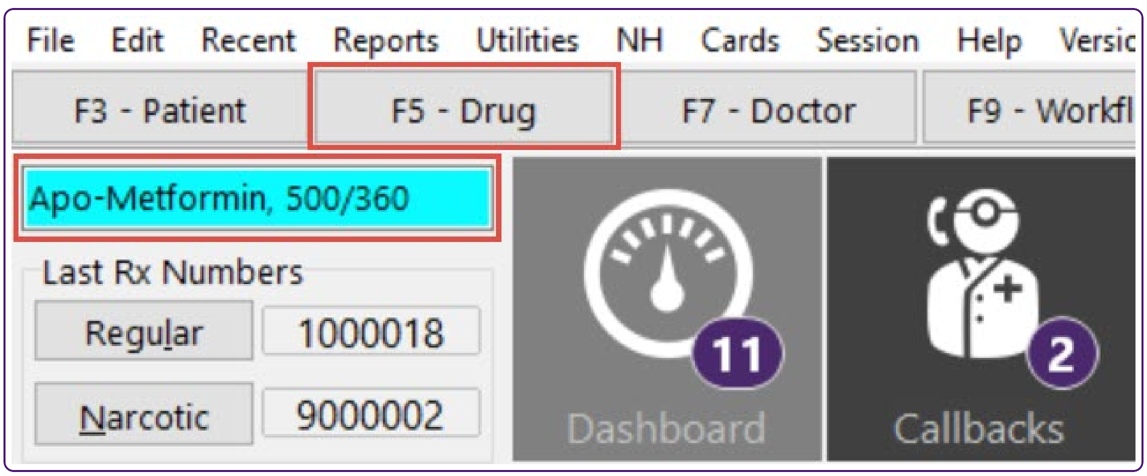
3. Double click the drug record.

   The**F5 - Drug** window is displayed.



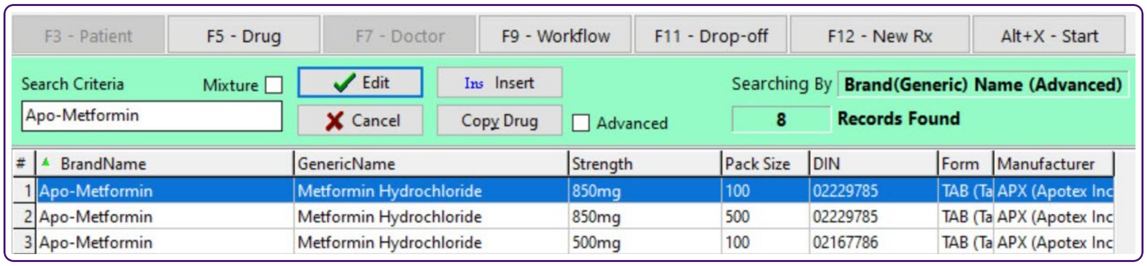
Method 2: From the Alt - X Start window

1. From the **Alt - X Start** window, enter any of the search criteria described in the previous section, then select **F5 - Drug**.



   The list of matching drugs is displayed.

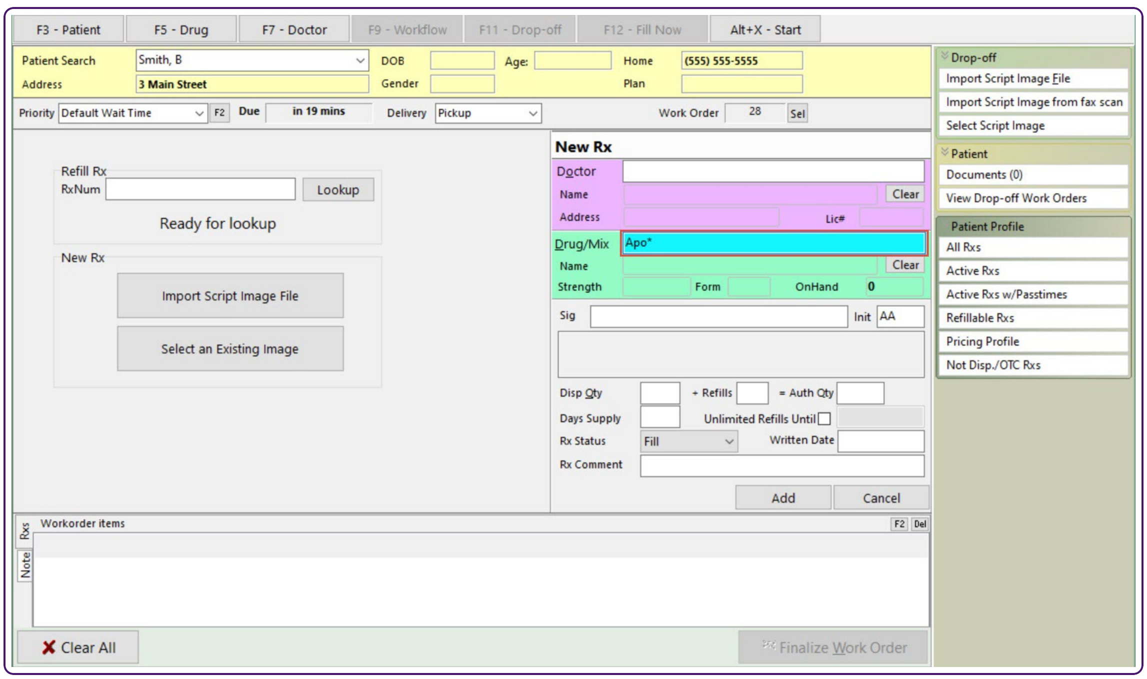
2. If the criteria you entered matches a single drug, it is displayed. If it matches multiple drugs, a list of drugs is displayed. Double-click the applicable drug.



3. The**F5 - Drug** window is displayed.

Method 3: From the F11 - Drop-Off window

1. From the **F11 - Drop-Off** window, search for and select the applicable patient.
2. In the Drug/Mix field, enter any of the search criteria described in "Searching for a Drug" (page 111) in the **Drug Search** field and press Enter.



3. If the criteria you entered matches a single drug, it is displayed. If it matches multiple drugs, a list of drugs is displayed. Double-click the applicable drug.

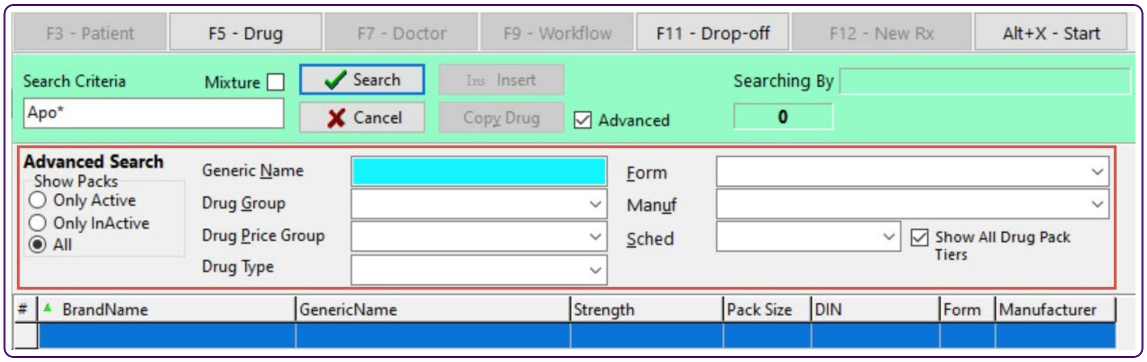
   The **F5 - Drug** window is displayed.

Performing an Advanced Drug Search

If you cannot locate a drug through a regular drug search described earlier, you can complete an **Advanced Drug Search**.

1. From the **F5 - Drug** search window, select **Advanced**.

   The **Advanced Search** pane is displayed.

2. Enter your search criteria and select **Search**.
3. To locate an inactivate drug, select the **Only Inactive** or **All** checkbox.

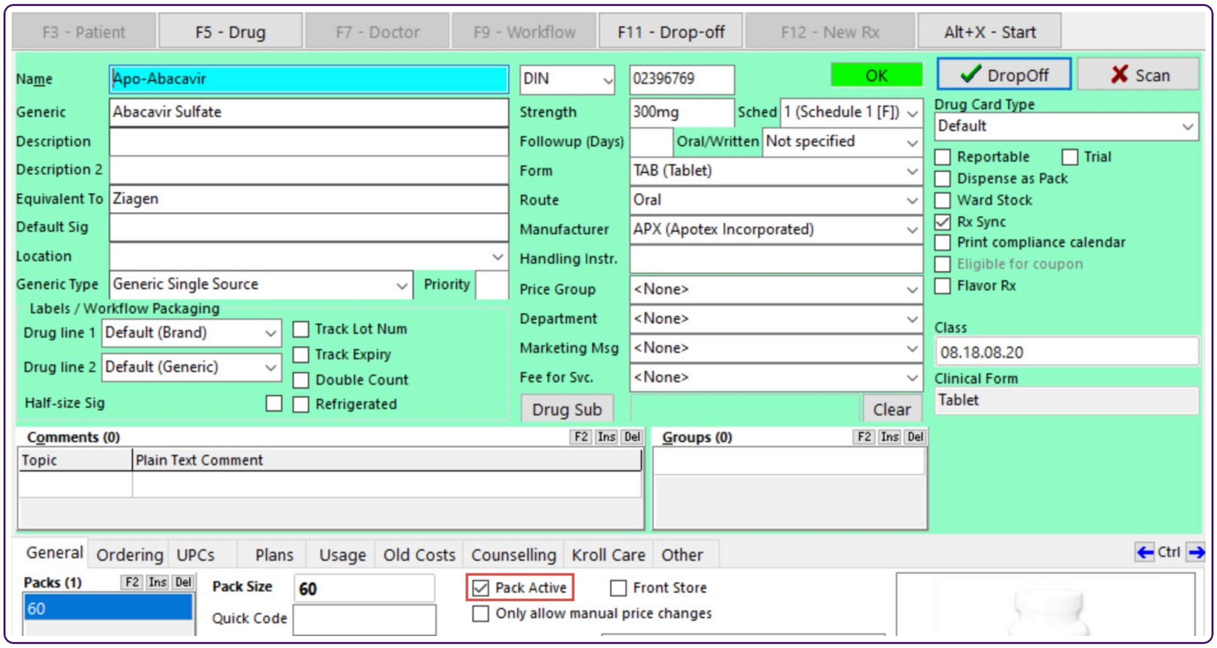
   Inactive drug records are displayed in red text in the drug search window.

Inactive drug records

There are several reasons you may choose to inactivate drug records. For example, you may inactivate a drug because the manufacturer no longer produces that particular pack size, or because the drug has been discontinued. Inactivating these records ensures the regular search provides more succinct results and reduces the chances the wrong drug pack is selected for a prescription. Inactivated drug records are not returned in the regular drug search; you must locate them using the **Advanced** search.

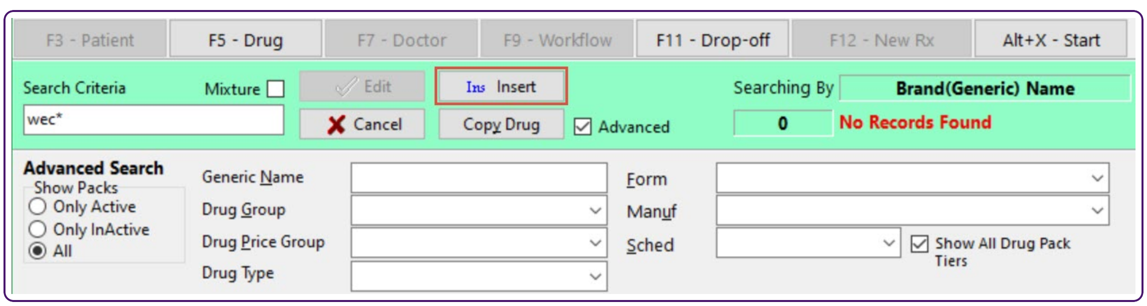
Inactive drugs cannot be used in prescriptions.

- To inactivate a drug record, deselect the **Pack Active** checkbox in the drug record:

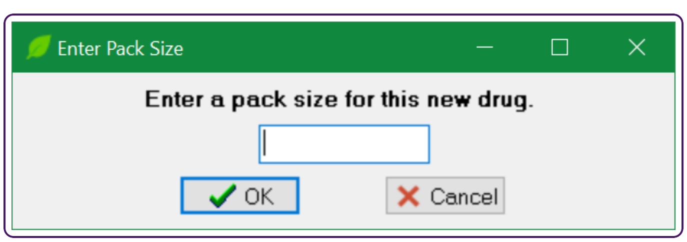


Creating a new drug record

1. Perform a thorough search to ensure the drug does not already exist. You will be prompted to perform an **Advanced** search for inactive drugs.
2. Once you have determined the drug does not exist in the system, select **Insert** or press the **Insert** key.



3. Enter a pack size for the new drug and select **OK**.



   A blank **F5 - Drug** window is displayed.

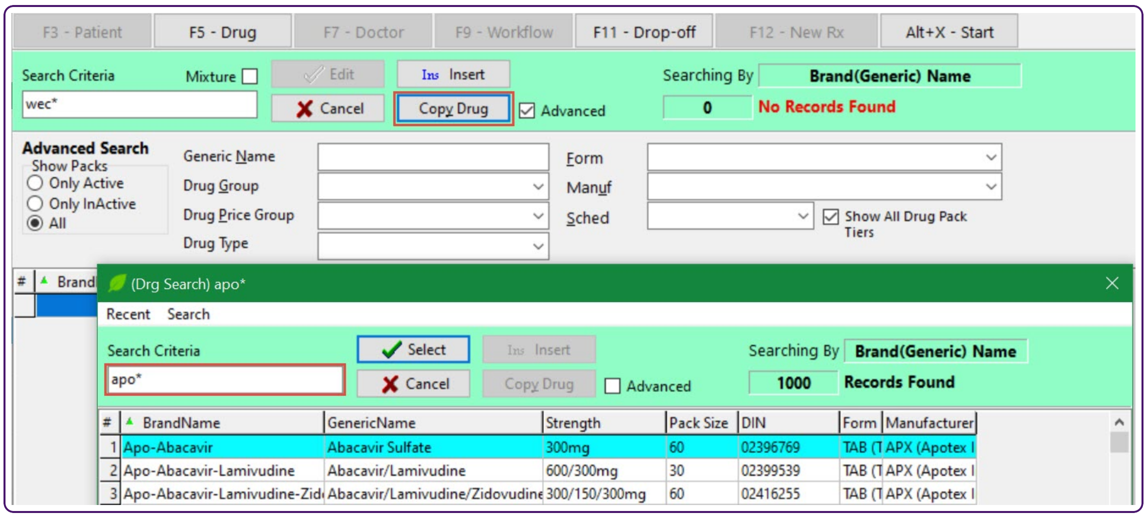
4. Complete the drug fields and select **Save**.

Copying an existing drug record

When a drug manufacturer releases a new strength for an existing drug product, you can copy the existing drug rather than re-entering duplicate drug information.

1. Perform a thorough search to ensure the drug does not already exist. You will be prompted to perform an **Advanced** search for inactive drugs.
2. When you have determined the drug does not exist in the system, select **Copy Drug** or press CTRL+Y.

   A second drug search window is displayed.
3. Search for the drug that should already be in the system.



4. Highlight the drug you want to copy and click **Select**.

   The selected drug record is displayed.
5. Review the record and ensure it is the drug you want to copy.
6. Click **Select**.
7. Enter a pack size for the new drug and select **OK**.

   A prompt appears, asking if you want to copy the price information to the new drug.
8. Select **Yes**.
9. Enter any missing information for the new drug record.

   The DIN is not copied over.
10. Select **Save**.

Drug Record fields

Name	Description
Name	The name of the drug.
DIN	The Drug Identification Number for the drug product, or one of the following values: “PDIN – Pseudo DIN”, “ NPN – Natural Product Number”, “HDIN – Homeopathic DIN”, or “OPIN – OPINION”.
Generic	If the drug record is a generic product, this field displays the brand name equivalent.
Strength	The strength of the drug.
Sched	The drug schedule.
Description, **Description 2**	The description of the drug.
Followup (Days)	The number of days that will elapse before a follow-up reminder is created to remind the pharmacist to follow up with the patient regarding their drug treatment.
Oral/Written	Whether the drug requires an oral or written prescription.
Form	The form of the drug product, such as capsule, tablet, or injection.
Equivalent To	The brand name equivalent of the drug product being dispensed.
Route	The route of administration for the drug product, such as oral, topical, or intravenous.
Default SIG	Used to quickly populate the Rx with a repeatedly used sig code.
Manufacturer	The manufacturer of the drug product, such as Astra or Pfizer.
Location	Store level users can enter information about the physical location of a drug product in this field to facilitate its retrieval (e.g. refrigerator, safe.)
Handling Instr.	The handling instructions for a drug product (e.g. sublingual tablets should be handled with clean dry hands).
Generic Type	One of the following: ▪ Brand Multi Source Brand ▪ Brand Multi Source Generic ▪ Brand Single Source ▪ Generic Multi Source ▪ Generic Single Source
Priority	The priority of the drug.
Price Group	The price group assigned to the drug, for activation of specific pricing requirements. Drug Price Groups are configured and assigned by head office.
Department	The department the drug belongs to. Drug departments are used to narrow report output to certain clusters of drugs. They are similar to drug groups, but a drug record can only belong to one drug department (which maintains mutual exclusivity between departments), whereas a drug record can belong to multiple drug groups.

Name	Description
Marketing Msg.	The marketing message for the drug. Marketing messages promote and support awareness for certain products, and facilitate branding of the business. They are printed on the patient receipt whenever a prescription is filled for the drug. For example, if a pharmacy is holding a diabetes clinic, a message about this clinic can be attached to diabetic drugs and supplies. Marketing messages are configured by the head office.
Fee for Svc.	If a value is selected, the drug record is being used to bill a professional service. Some types of professional service billings require specific indicators to be sent to the third party in order for the claim to go through; by selecting the appropriate Fee for Service option in the drug record, billing indicators are automatically sent with the prescription during adjudication. Fee For Service entries are configured by the head office.
Drug line 1	The type of drug information (i.e. Brand, Generic, Description, Description 2, Equivalent To) that is printed on the vial label.
Drug line 2	The type of drug information, different from Drug Line 1, that is printed on the vial label.
Half-siz Sig	If selected, the SIG is printed at half its usual size. This option is useful for drug products that usually have long SIG instructions, such as eye drops.
Track Lot Num	If selected, you must enter the lot number of the drug product into the Motorola handheld during the filling stage.
Track Expiry	If selected, you must enter the expiry date (MM/YYYY) of the drug product into the Motorola handheld during the filling stage.
Double Count	If selected, the quantity of the drug must be counted twice.
Refrigerated	If selected, the word “Refrigerated” appears on the handheld during filling and at point of sale, during the prescription pick up stage.
Drug Sub	Select this button to link the drug record to an interchangeable substitute. When a Drug Sub is selected, you will be prompted to use the substitution when inputting a prescription.
Drug Card Type	The type of drug record if it is not for a standard drug (default). For example, device or vaccine.
Reportable	If selected, the system tracks prescriptions filled for the drug product and display results in the Narcotic report.
Trial	If selected, during the first fill of a prescription, you are asked if you would like to fill a trial supply instead of the total dispense quantity of the prescription.
Dispense as Pack	If selected, the drug product is billed to third parties as multiples of one pack instead of doses. This checkbox is used in some provinces for billing birth control, inhalers, and nasal sprays.
Ward Stock	Used by pharmacies that dispense ward stock to patients.
Rx Sync	If selected, this drug is included when the refill due dates are synchronized, so the patient makes only one trip to the pharmacy to pick up their prescriptions, rather than separate trips per prescription.

Name	Description
Print compliance calendar	If selected, a calendar of empty boxes appears for the patient to use to document the doses they have taken.
Eligible for Coupon	If selected, the configured coupon is printed when the prescription is filled. Coupons are configured by home office
Flavor Rx	If selected, flavoring should be used to augment the taste of the medication. A note is printed on the hardcopy to remind users to use flavoring when preparing of the drug.
Class	The therapeutic class code from First Data Bank.
Clinical Form	The clinical form of the drug product from First Data Bank.
Comments	Any comments about the drug record. Comments are entered from the **Comments** pop-up: ▪ If **Show on Rx** is selected, the comment is displayed on the **F12 - Fill Rx** window. ▪ If **Print on Hardcopy** is selected, the comment is printed on the hardcopy portion of the Rx label. Only one drug comment can be flagged on the hardcopy due to limited space. ▪ If **Alert** is selected, the comment will pop up every time the drug card is accessed.
Groups	The group or groups the drug belongs to, if applicable. Drugs can be included in a group for a wide range of reporting purposes. For example, a drug group called "Diabetic Supplies" could be attached to a drug record for diabetic supplies. Drug Groups are created by head office and can be applied to any number of drug records.
View Reason Codes	Select to display Reason Codes and Reason Code descriptions for Limited Use products. You can also print Reason Code information from the window. This button is only applicable to Ontario pharmacies.

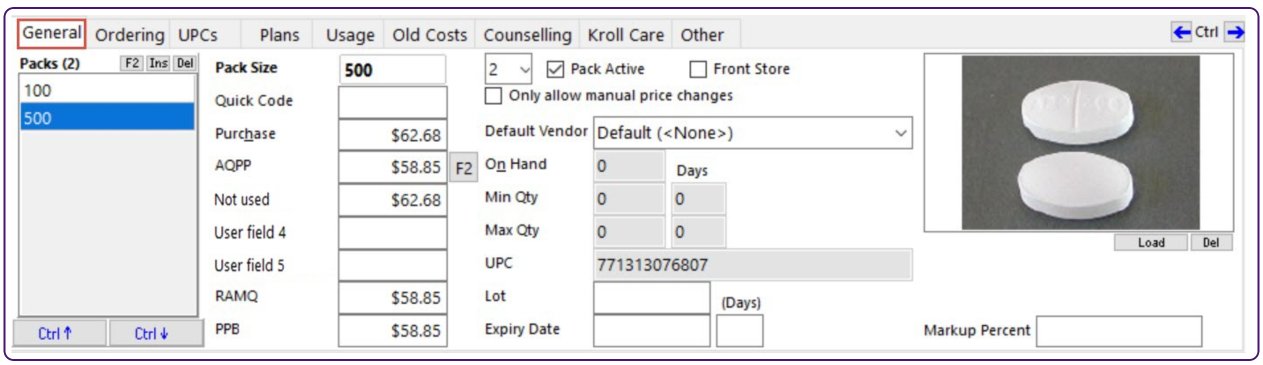
Chapter 8

Drug information tabs

The following sections describe the tabs at the bottom of the drug record.

General

The **General** tab displays general information about the cost and quantity of the selected drug.



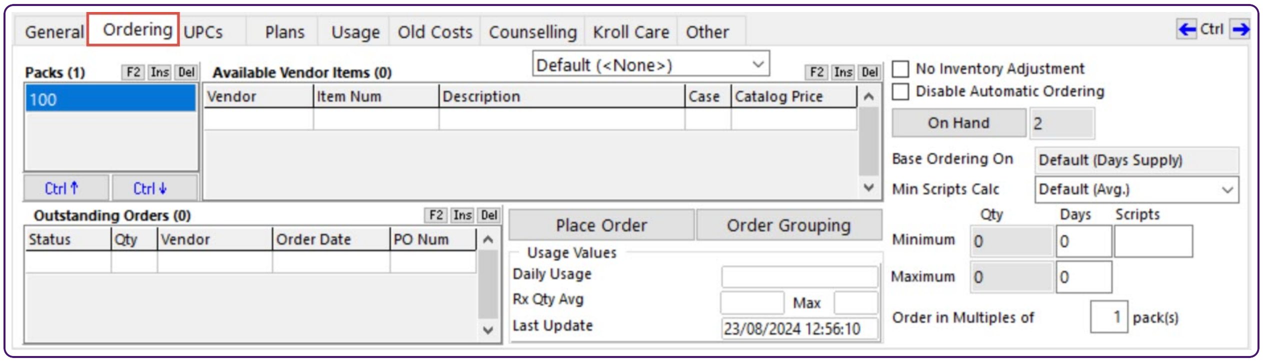
The following table describes the fields on this tab.

Name	Description
Packs (#)	The pack sizes available for the drug product (in Ontario, this area also displays ODB pack sizes). When a drug pack is highlighted, its information is displayed to the right.
Pack Active	If selected, the pack size is in current or recent use. If deselected, the pack size has been discontinued or is no longer in use. Inactive drug packs are not returned using the regular search; they must be located via the advanced search.
Front Store	If selected, the product is available over-the-counter.
Quick Code	A short name for the drug record, for use during searching (e.g. T3 for Tylenol with Codeine #3). Note: when searching for a drug by its quick code, the code must be preceded by a period (.).

Name	Description
Only allow manual price changes	If selected, pricing fields are not updated when updates are run against the drug card.
Purchase	The cost of the drug product when it is purchased from the vendor (i.e. acquisition cost). System pricing strategies may use the value of this field.
Default Vendor	The vendor of the drug product.
Selling	The cost of the drug as it is sold to the patient.
On Hand	The number of days' worth of medication currently available for dispensing.
User Cost 1, 2, 3, 4, and 5	The pricing strategy for the drug.
Min Qty	A number representing the minimum allowable quantity for a drug product before a reorder is triggered. For example, if the minimum quantity is set at 100, when the amount on hand drops below 100 units, the drug pack is placed on order. The **Days** field display the minimum number of days’ supply that triggers reordering and is related to **Min Qty** through a calculated formula. **Min Qty** is required for perpetual inventory.
Max Qty	Is used to calculate how much of the drug product should be reordered. For example, if a drug pack has a **Max Qty** set to 300, the system will order enough so that the current amount on hand reaches 300 units. The **Days** field displays the maximum days’ supply a store should have on hand and is related to **Max Qty** through a calculated formula. **Max Qty** is optional for perpetual inventory; when the field is empty the system will always order 1 package of the drug pack.
UPC	The drug pack's UPC. If there is more than one UPC for the drug pack, the UPC marked as “default” is displayed here.
Lot	The lot number of the drug product. This field cannot accept multiple lot numbers.
Expiry Date	The expiry date (DDMMYYYY) of the drug, or the number of **Days** that the drug is good for once it is dispensed. The expiry date is printed on the vial label. This field cannot account for multiple expiry dates.
(Drug picture)	A photo of the drug. Drug pictures are provided via periodic updates from central maintenance.
Markup Percent	The percentage of markup applied to the drug.

Ordering

The **Ordering** tab displays information related to drug ordering.



The following table describes the fields on this tab.

Name	Description
Packs (#)	The pack sizes available for the drug product (in Ontario, this area also displays ODB pack sizes). When a drug pack is highlighted, its information is displayed to the right.
Available Vendor Items	The default vendor of the drug product, as well as its catalog information.
No Inventory Adjustment	If selected, the On Hand field is not adjusted when the drug is dispensed, nor is it adjusted when the product is received into the system; in other words, the On Hand field remains static. You might use this checkbox for OTC products that you create a “Not Dispensed” prescription for because you want the prescription in the patient’s medication history, but you do not want to deduct inventory from the drug record for it.
Disable Automatic Ordering	If selected, the drug is not included in the automatic order even if the **On Hand** quantity is less than the **Minimum**. You might select this checkbox for expensive products you want to order on demand rather than through the automatic ordering system.
On Hand	The current amount of medication available for dispensing. This field is also displayed on the **General** tab.

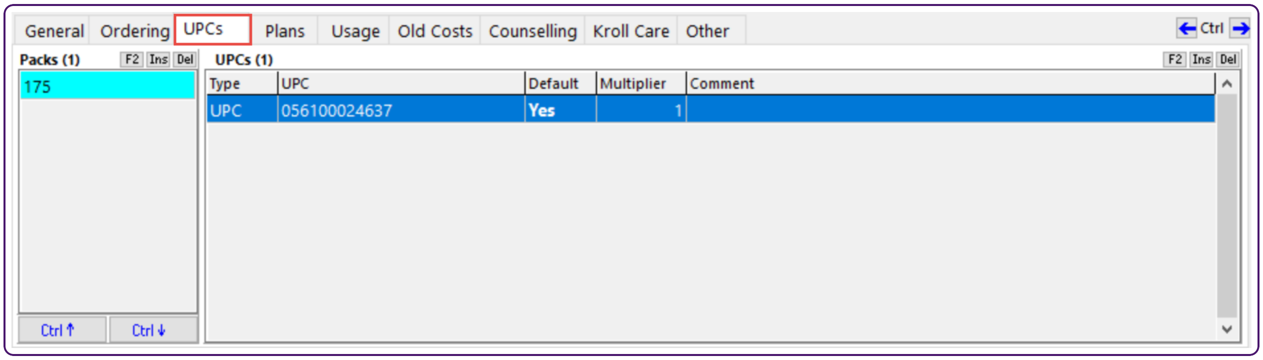
Name	Description
Base Ordering On	Reordering can be based on **Min/Max** or **Usage/Days Supply** (default). In both scenarios, if automatic ordering is activated, a drug product is placed on order when the **On Hand** value drops below the **Minimum** value. When **Min/Max** is selected, the **Days Supply** fields are greyed out, and vice-versa. Use Min/Max ordering if you want to control the exact point at which a drug is reordered. The Min/Max values do not change once they are set because the values are independent of usage, which means you need be aware of drug usage and adjust these values as needed. Min/Max ordering is particularly useful for drugs that the pharmacy wishes to under-stock or overstock. Use Usage (Days Supply) ordering if you want your reorder drug points to be dynamic values that increase or decrease depending on how often the drug is dispensed within the days supply indicated. This is particularly useful for cyclical drugs like allergy medications, which are dispensed frequently during some parts of the year and less during other parts. The minimum and maximum values are not open for manipulation as they are calculated values; this may result in less control over the exact point the drug is ordered.
Min Scripts Calc	Script quantity can be based on Maximum Rx Quantity or Average Rx Quantity.
Minimum and **Maximum**	The minimum and maximum Qty or Days' worth of the drug to maintain.
Order in Multiples of ___ pack(s)	This field is useful for products that are dispensed in multiple packs, such as birth control.
Outstanding Orders	A row is added to this table when a drug product has been ordered and is on its way to the pharmacy, or is in the process of being ordered. If a row is displayed in this table, the drug product will not be ordered even when the **On Hand** is below the minimum required. This rule prevents the system from duplicating orders for drug products.
Place Order	Select this button to add a manual order for the drug; this manual order is added to the automatic order when it is generated. This function is used when the pharmacy wants to order more of a product even though the **On Hand** quantity is greater than the minimum. It is also used to future-date a drug order so that the drug product will be placed on order on the date specified. This is useful for drug products that have short expiries or are costly to stock in advance of dispensing. For more information, see "Order Drug" (page 129).
Order Grouping	Select this button to create reorder points for a drug grouping. By grouping interchangeable drugs, Kroll will reorder the primary assigned pack when stock depletes from each drug in the group.
Usage Values section	The fields in this section display a succinct snapshot drug movement in terms of daily usage, average Rx quantity, and maximum Rx quantity. Usage values help users to make optimal decisions on replenishment.

UPCs

The **UPCs** tab displays all of the UPCs listed for the selected drug pack. To view the UPCs that correspond to a specific pack size, highlight the applicable drug pack on the right hand side.

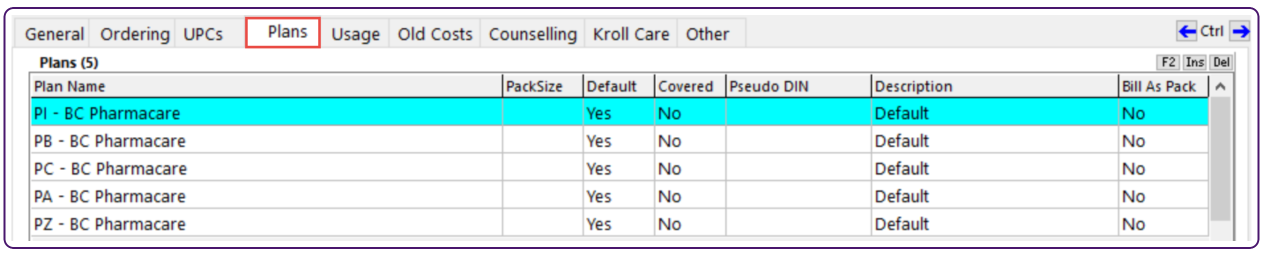
UPCs are centrally maintained; as such, please communicate any errors to TELUS Health support for correction.

The UPCs listed in this view are used to verify that the correct product is being used to package an Rx at the filling stage.



Plans

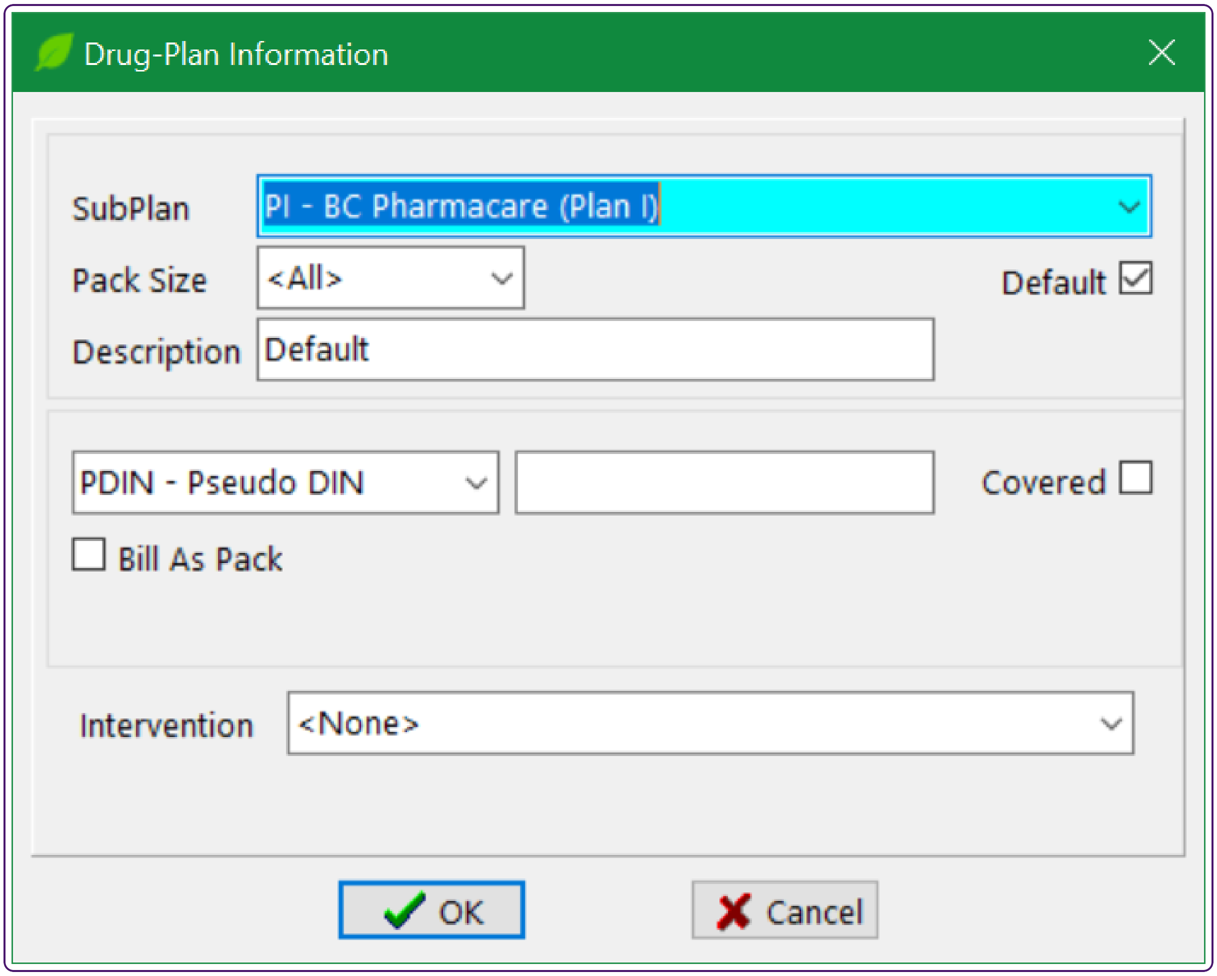
The information displayed on the **Plans** tab is centrally maintained by head office.



This tab serves two purposes:

- It displays formulary coverage for the drug product. From this tab, you can locate the entry for the provincial plan (in this case ODB for Ontario) and see if the drug product is covered. Provincial coverage is updated regularly through formulary updates to the system.

- It contains the **Pseudo DINs** that are adjudicated to third parties for reimbursement. To view the details of a pseudo DIN, double click the applicable row, or highlight it and press F2. This displays the **Drug-Plan Information** window, where detailed pseudo DIN information is displayed.



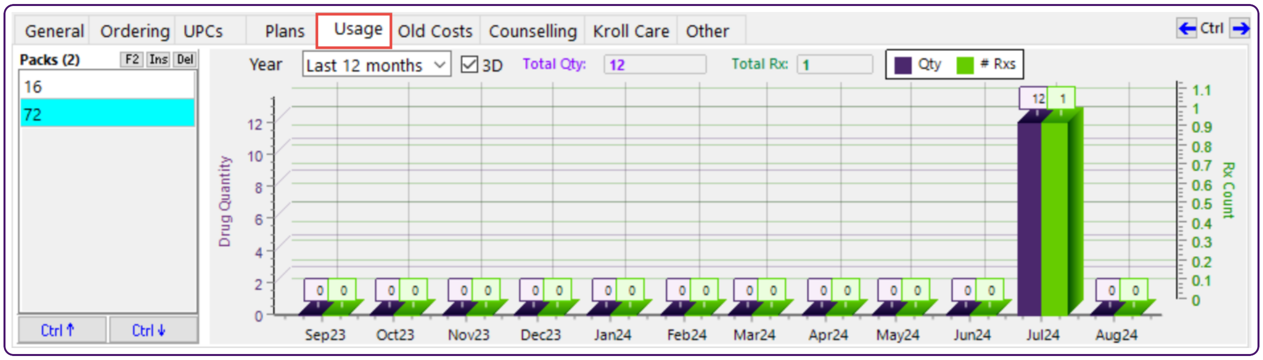
From the **Drug-Plan Information** window, you can see which pack sizes the pseudo DIN is being applied to. If the **Default** checkbox is selected, the pseudo DIN is automatically sent to the third party during adjudication; if it is not selected, the DIN on the drug record is sent to the third party rather than the pseudo DIN.

If **Covered** is selected, the third party plan will pay for the drug product. This checkbox is for informational purposes only.

Usage

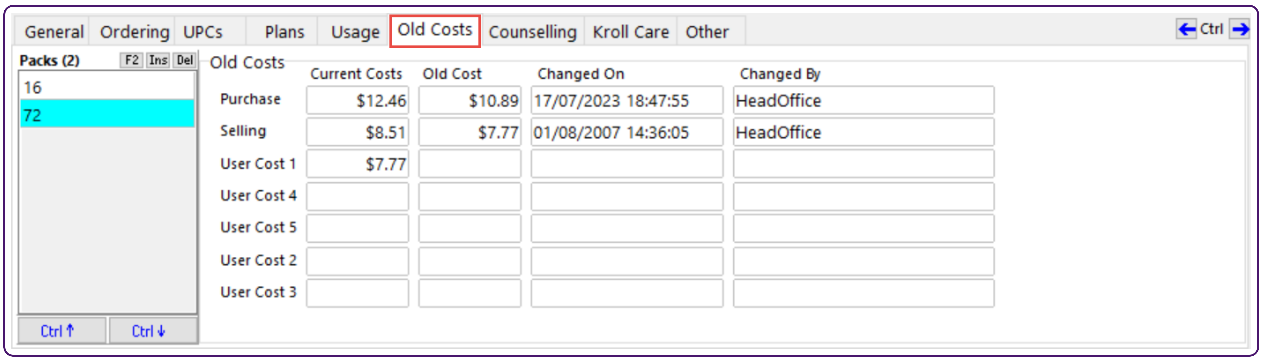
The **Usage** tab displays information regarding how often and in what volume a drug product was dispensed within a specific time period. This information helps you to determine if current ordering points (i.e. Min/Max values) support optimal replenishment.

The graph on the **Usage** tab displays how many prescriptions have been filled for the drug product and the total drug quantity dispensed monthly. Use the **Year** dropdown menu to specify a date range.



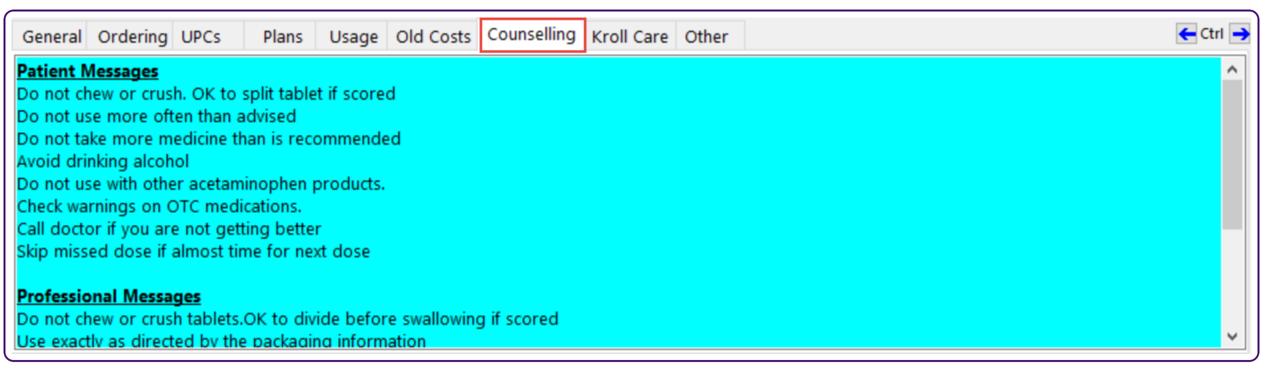
Old Costs

The **Old Costs** tab displays pricing changes made to any of the seven price fields on the **General Tab** of the drug record. Refer to this tab to identify when, why and by whom a price change was made.



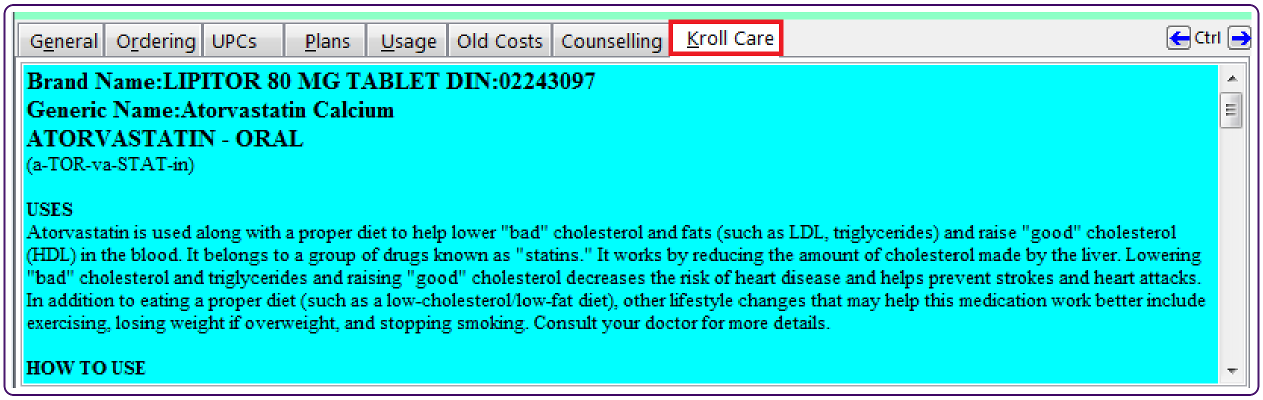
Counseling

The **Counseling** tab displays patient counseling messages from the First Data Bank (FDB) clinical drug module. Counseling messages are divided into **Patient Messages** and **Professional Messages**.



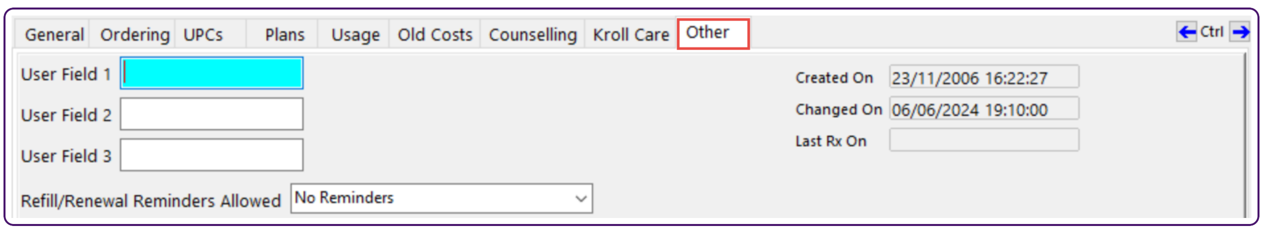
Kroll Care

The **Kroll Care** tab displays the Drug Information Monograph that is printed out and handed to the patient during the prescription filling process. The content of Kroll Care is provided by the First Data Bank (FDB) clinical drug module. To print this monograph on demand, select **Print Kroll Care** from the drug sidebar, or select **Drug** > **Print Kroll Care** from the menu.



Other tab

The **Other** tab displays miscellaneous information about the drug record.



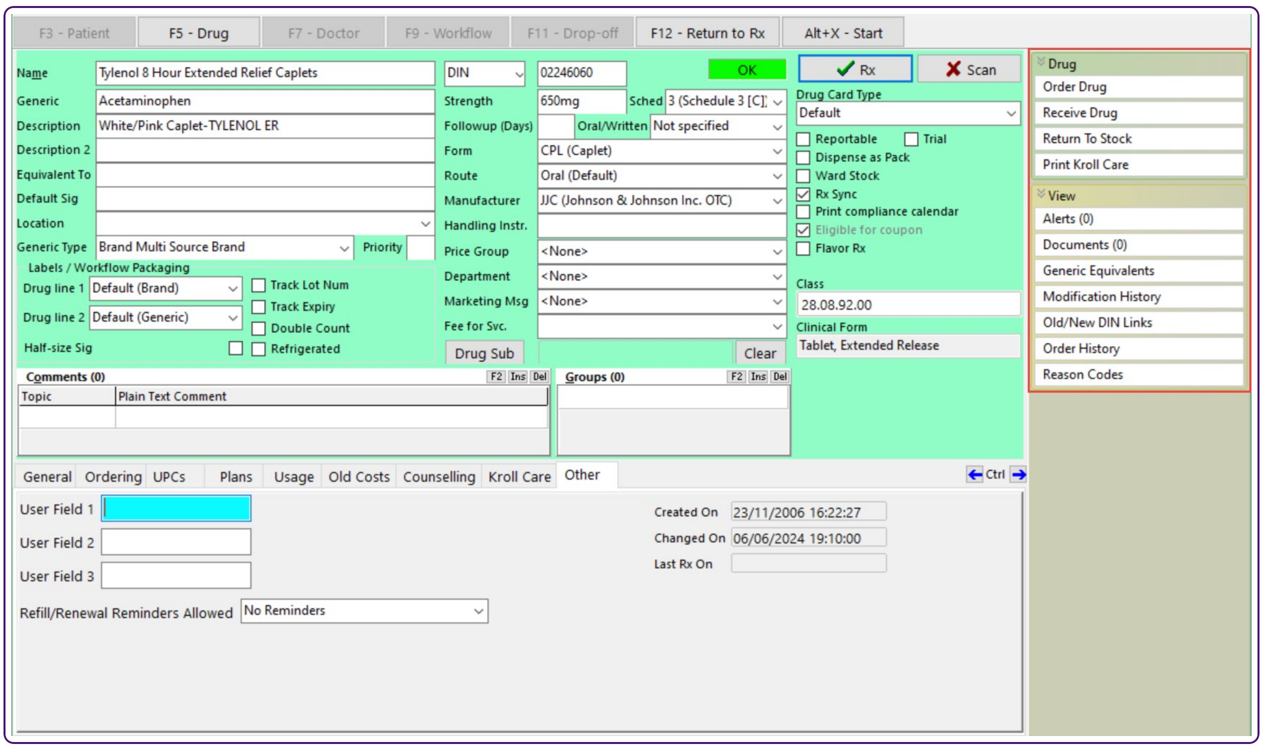
The following table describes the fields on this tab.

Name	Description
User Field 1, 2, and 3	These fields are used if configured via Central Maintenance Configuration.
Created On	The date and time the drug record was created.
Changed On	The date and time the drug record was last changed.
Refill/Renewal Reminders Allowed	Whether refill and renewal reminders are allowed.

Chapter 9

Drug sidebar functions

The drug sidebar is available to the right of the **Drug** window whenever a drug record is displayed.



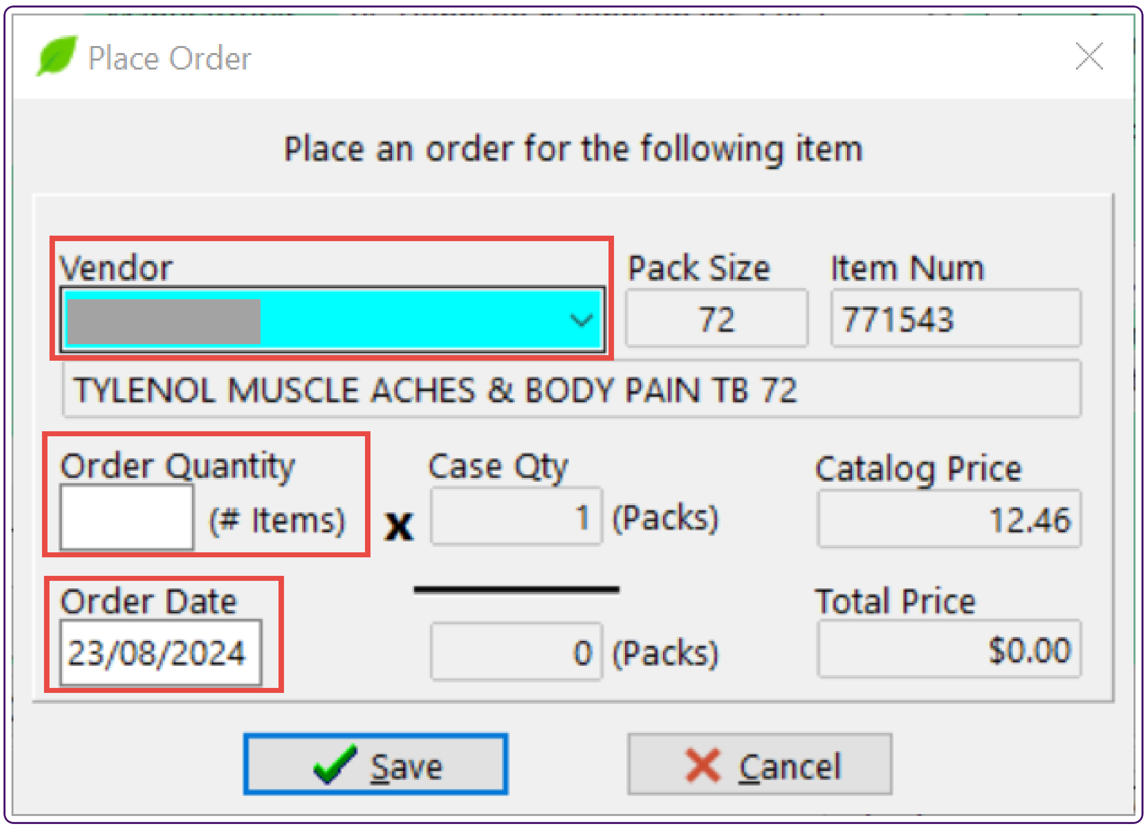
Order Drug

The **Order Drug** function is used to create a manual order when the pharmacy wants to order more of a product even though the **On Hand** quantity is greater than the minimum. It is also used to future-date a drug order so that the drug product will be placed on order on the date specified. This is useful for drug products that have short expiries or are costly to stock in advance of dispensing. Your manual order is added to part of the automatic order when it is generated.

1. Select **Order Drug**.

   You an also select the **Place Order** button on the **Ordering** tab.

   The **Place Order** window is displayed.



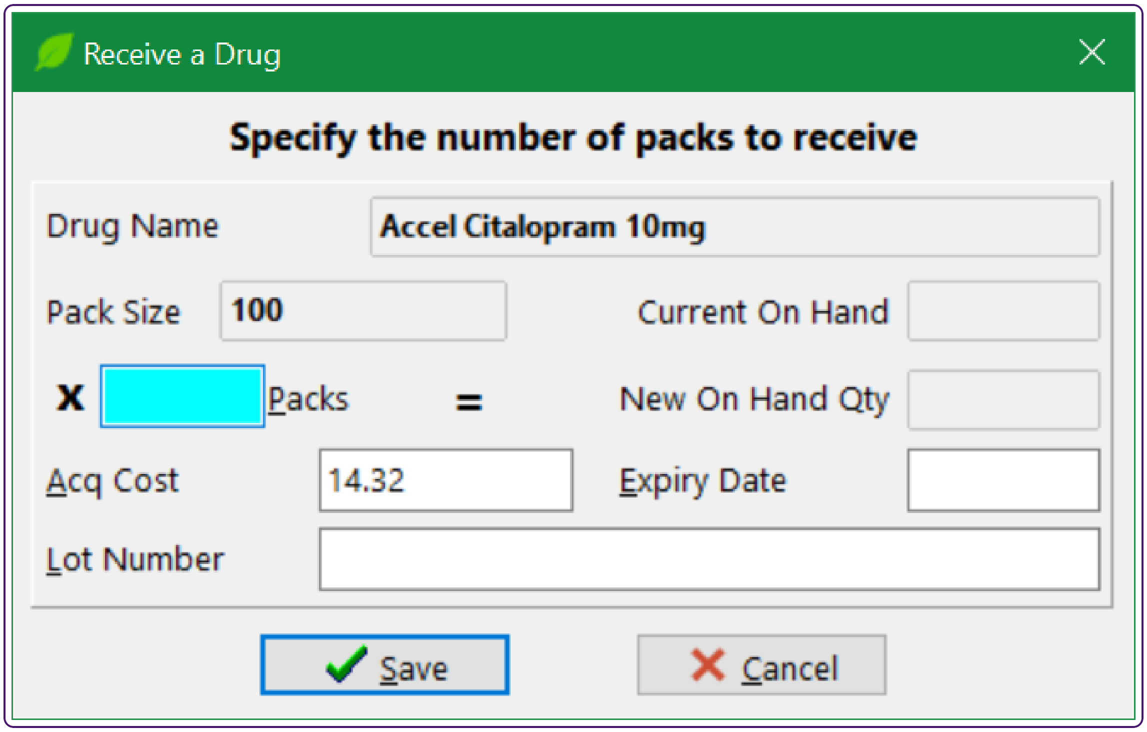
2. Select the **Vendor**.
3. Enter the **Order Quantity** and **Order Date**.
4. Select **Save**.

Receive Drug

Use the **Receive Drug** function when you want to add drugs to your pharmacy's drug inventory. When drugs are received into the system, the on hand quantity for that drug is updated accordingly.

1. Select **Receive Drug**.

   The **Receive a Drug** window is displayed.



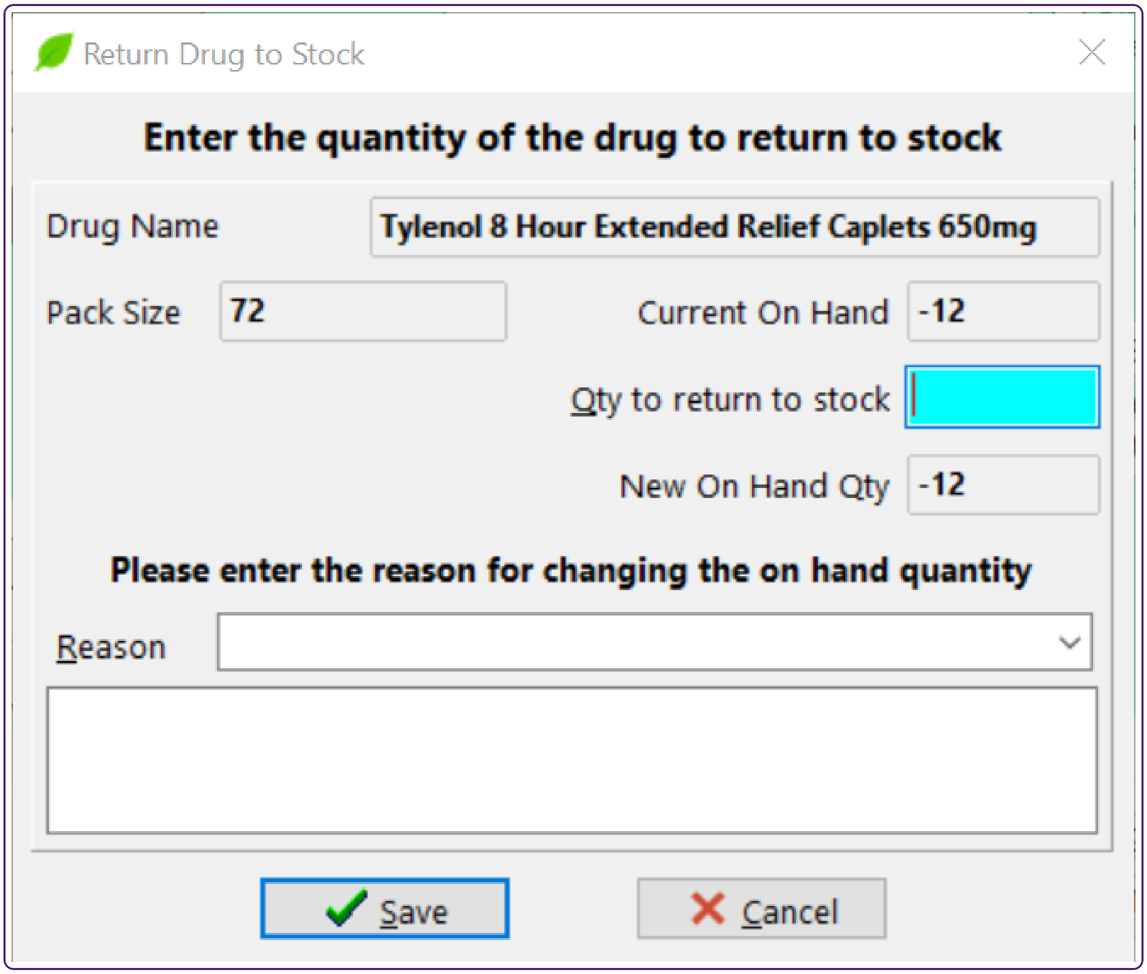
2. Enter the number of **Packs** received, the **Lot Number**, and the **Expiry Date**.
3. Select **Save**.

Returning to stock

Use the **Return to Stock** function to return stock to the inventory.

1. Select **Return to Stock**.

   The following pop-up is displayed.

2. Enter the **Qty to return to stock** and select a **Reason**, if applicable.
3. Select **Save**.

Print Kroll Care

Kroll Care is an informational printout that is provided to patients upon receiving their prescribed medication. The content of Kroll Care is provided by the First Data Bank (FDB) clinical drug module.

- Select **Print Kroll Care** to generate this printout.

BC

Tylenol8HourExtendedReliefCaplets650mgCPL DIN 02246060

Acetaminophen 23-Aug-2024

(a-SEET-a-MIN-oh-fen)

WARNING

Taking too much acetaminophen may cause serious (possibly fatal) liver disease. Adults should not take more than 4000 milligrams (4 grams) of acetaminophen a day. People with liver problems and children should take less acetaminophen. Ask your doctor or pharmacist how much acetaminophen is safe to take. Do not use with any other drug containing acetaminophen without asking your doctor or pharmacist first. Acetaminophen is in many nonprescription and prescription medications (such as pain/fever drugs or cough-and-cold products). Check the labels on all your medicines to see if they contain acetaminophen, and ask your pharmacist if you are unsure. Get medical help right away if you take too much acetaminophen (overdose), even if you feel well. Overdose symptoms may include nausea, vomiting, loss of appetite, sweating, stomach/abdominal pain, extreme tiredness, yellowing eyes/skin, and dark urine. Daily alcohol use, especially when combined with acetaminophen, may damage your liver. Avoid alcohol.

USES

This drug is used to treat mild to moderate pain (from headaches, menstrual periods, toothaches, backaches, osteoarthritis, or cold/flu aches and pains) and to reduce fever.

HOW TO USE

Take this product by mouth as directed. Follow all directions on the product package. If you have any questions, ask your doctor or pharmacist. There are many brands and forms of acetaminophen available. Read the dosing instructions carefully for each product because the amount of acetaminophen may be different between products. Do not take more acetaminophen than recommended. (See also Warning section.) If you are giving acetaminophen to a child, be sure you use a product that is meant for children. Use your child's weight to find the right dose on the product package. If you don't know your child's weight, you can use their age. For suspensions, shake the medication well before each dose. Some liquids do not need to be shaken before use. Follow all directions on the product package. Measure the liquid medication with the provided dose-measuring spoon/dropper/syringe to make sure you have the correct dose. Do not use a household spoon. For rapidly-dissolving tablets, chew or allow to dissolve on the tongue, then swallow with or without water. For chewable tablets, chew thoroughly before swallowing. Do not crush or chew extended-release tablets. Doing so can release all of the drug at once, increasing the risk of side effects. Swallow the tablets whole. For effervescent tablets, dissolve the dose in the recommended amount of water, then drink. Pain medications work best if they are used as the first signs of pain occur. If you wait until the symptoms have worsened, the medication may not work as well. Do not take this medication for fever for more than 3 days unless directed by your doctor. For adults, do not take this product for pain for more than 10 days (5 days in children) unless directed by your doctor. If the child has a sore throat (especially with high fever, headache, or nausea/vomiting), consult the doctor promptly. Tell your doctor if your condition lasts or gets worse or if you develop new symptoms. If you think you may have a serious medical problem, get medical help right away.

SIDE EFFECTS

See also Warning section. This drug usually has no side effects. If you have any unusual effects, contact your doctor or pharmacist promptly. If your doctor has directed you to use this medication, remember that your doctor has judged that the benefit to you is greater than the risk of side effects. Many people using this medication do not have serious side effects. A very serious allergic reaction to this drug is rare. However, get medical help right away if you notice any symptoms of a serious allergic reaction, including: rash, itching/swelling (especially of the face/tongue/throat), severe dizziness, trouble breathing. This is not a complete list of possible side effects. If you notice other effects not listed above, contact your doctor or pharmacist. In the US - Call your doctor for medical advice about side effects. You may report side effects to FDA at 1-800-FDA-1088 or at www.fda.gov/medwatch. In Canada - Call your doctor for medical advice about side effects. You may report side effects to Health Canada at 1-866-234-2345.

PRECAUTIONS

See also Warning section. Before taking acetaminophen, tell your doctor or pharmacist if you are allergic to it; or if you have any other allergies. This product may contain inactive ingredients, which can cause allergic reactions or other problems. Talk to your pharmacist for more details. Before using this product, tell your doctor or pharmacist your medical history, especially of: liver disease, regular use/abuse of alcohol. Liquid products, chewable tablets, or dissolving/effervescent tablets and powders may contain sugar or aspartame. Caution is advised if you have diabetes, phenylketonuria (PKU), or any other condition that requires you to limit/avoid these substances in your diet. If you have any of these conditions, ask your doctor or pharmacist about using these products safely. Tell your doctor if you are pregnant before using this medication. Acetaminophen passes into breast milk. Consult your doctor before breastfeeding.

- Continued -

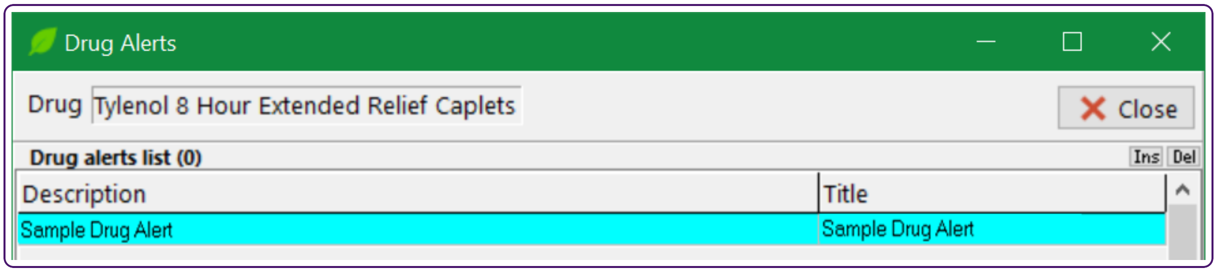
Page 1 of 2

Alerts

Alerts are messages about drug products. They are printed along with Kroll care and distributed to the patient as additional drug information. The number in brackets next to the type of alert identifies the number of alert messages for the drug product.

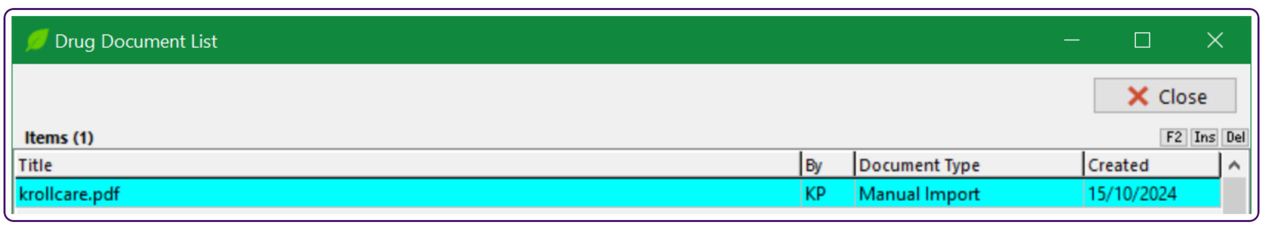
Drug alerts are added by head office and can be found under **Edit** > **Lists** > **Drug Alerts**.

- Select the **Alerts** button to read the details of the message.



Documents

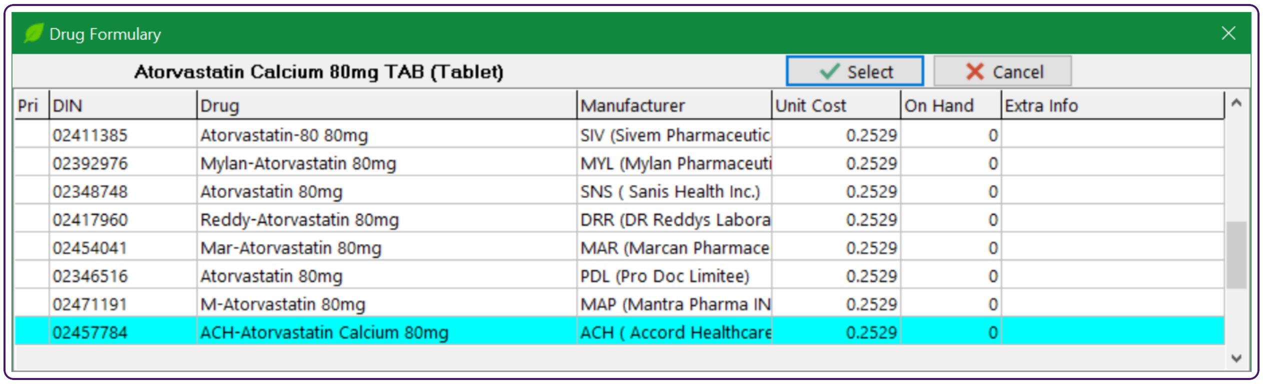
Use the **Documents** function to manage the attachments pertinent to a specific drug.



Generic Equivalents

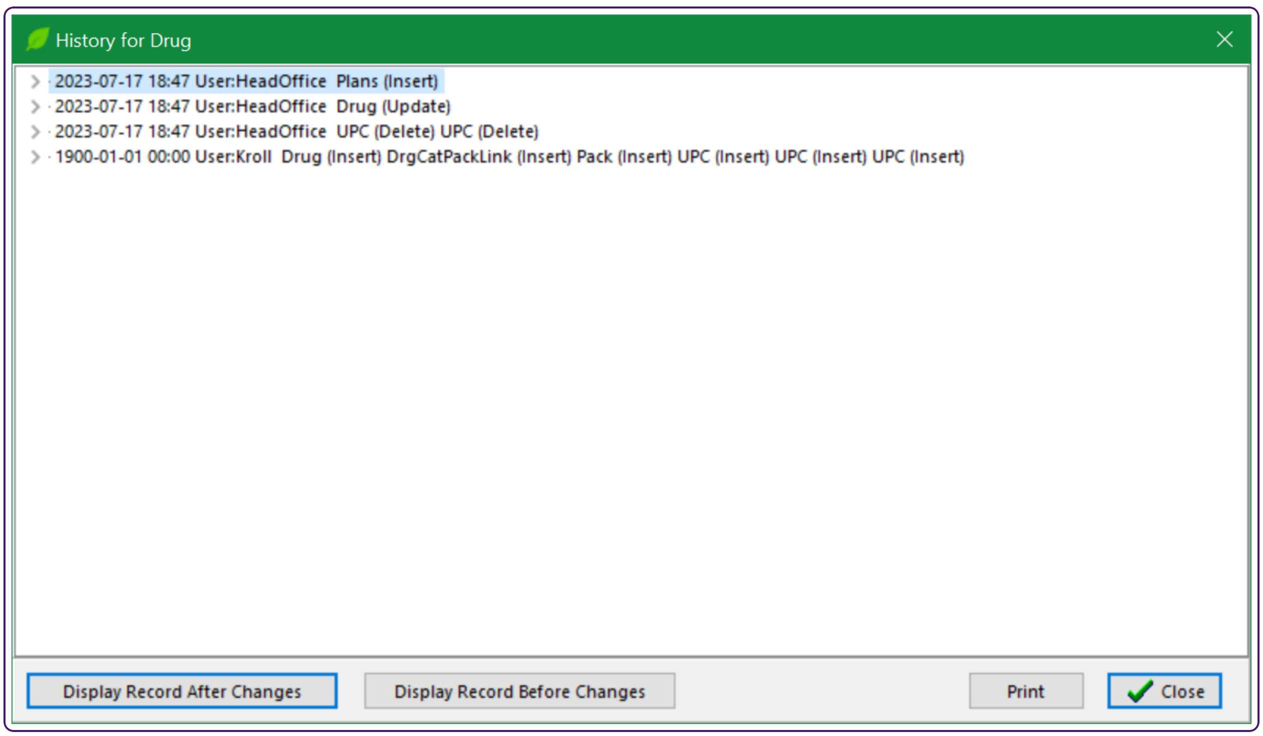
Use the **Generic Equivalents** function to view a comprehensive list of generic equivalents for a drug product. In Alberta and British Columbia, the **Generic Equivalent** list is maintained by **First Data Bank** (FDB) **Updates**, whereas in the rest of the provinces, the **Generic Equivalent** list is maintained by **Provincial Formulary Updates**. Highlight a generic equivalent entry and click **Select** or press Enter to display the corresponding drug record. Each entry displays the following information:

- Preferred Brand Indicator (1 = Preferred; 2 = 2nd Preferred, etc.)
- DIN
- Drug Name
- Manufacturer
- Unit Cost (Acquisition Cost ÷ Pack Size)
- On Hand quantity (Allows users to quickly see what brands are stocked)
- Extra Info: any applicable comments



Modification History

Use the **Modification History** function to display a read-only record of the changes made to the drug record. For example, if inventory is missing or overstated in the drug record, you could display the **Modification History** to view what changes were made to the **On Hand** field.

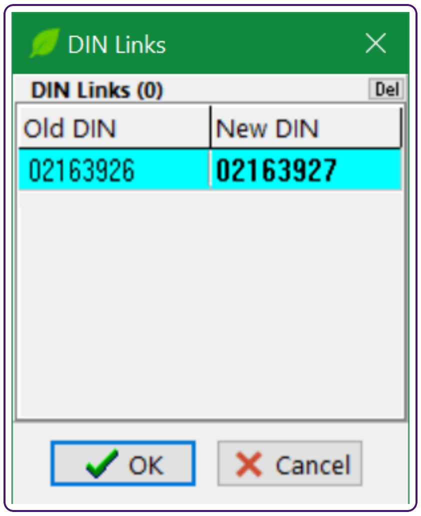


Select the plus sign (+) to expand the details or the minus sign (-) to hide them.

To view what the drug record looked like after or before a particular change was made, select a change record, then select **Display Record After Changes** or **Display Record Before Changes**, respectively.

Old/New DIN Links

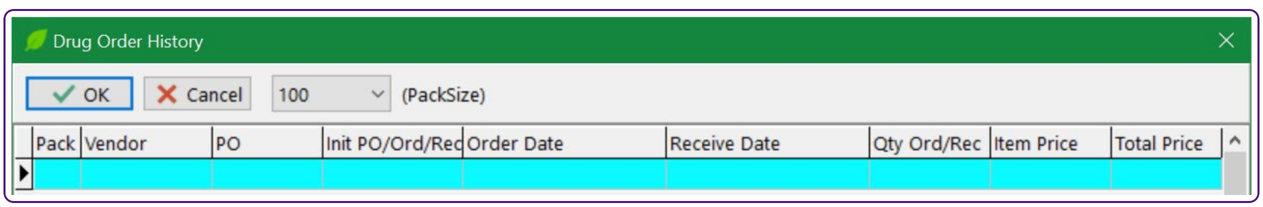
DIN links appear for drug products that have had a DIN change. They link the old DIN to the new DIN so that the system recognizes that both DINs are for the same product. You cannot create a DIN Link, but you can remove one by highlighting it and selecting **Del** or pressing Delete.



DIN links are centrally maintained by head office.

Order History

Use the **Order History** function to see when a drug product was placed on order (i.e., InitPO), sent (i.e., Ord), and received (i.e., Rec). You can use this information to help determine the root causes of ordering issues and discrepancies. To display the order history for different packs, change the **Pack Size**.



Reason Codes

The **Reason Codes** function is only applicable to pharmacies operating in the province of Ontario and for drug products that are eligible to be billed to the provincial plan (ODB) using Limited Use (LU) Codes. Use the **Reason Code** sidebar function to view all codes, descriptions, and expiries for the LU drug. To print these codes, select **Print** or press CTRL+P.

Chapter 10

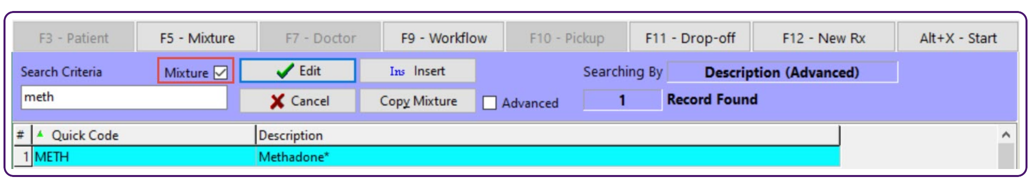
Mixture records

Mixture records are composed of two or more drug records. The drug records within a mixture are referred to as “components”.

Searching for a Mixture

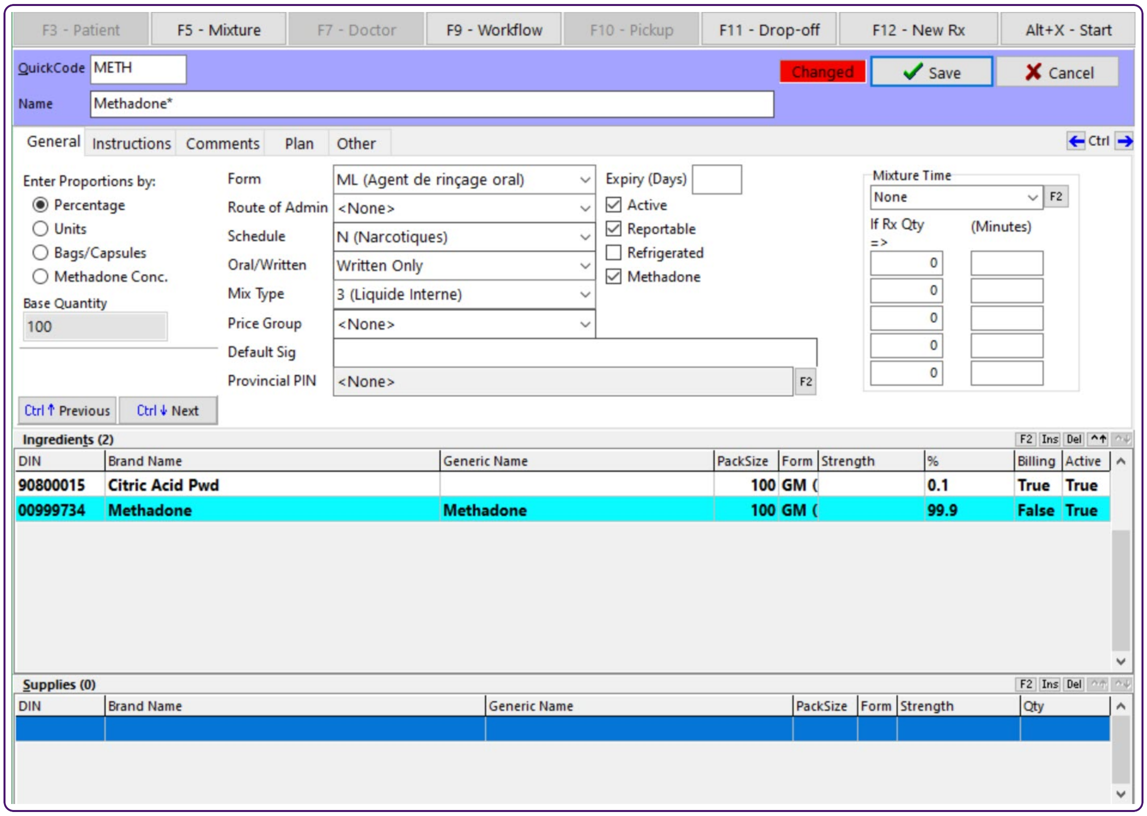
Method 1: From the F5 - Drug window

1. From the **Alt-X Start** window, select **F5 - Drug**.
2. Select **Mixture**, then enter one of the following search criteria in the **Search Criteria** field:
    a. The name or description of the mixture.
    b. The full or partial names of each component in the mixture, separated by commas, in any sequence. For example, to search for “Hydrocortisone 1% Powder in Clotrimaderm 1% Cream” you could enter “hydro, clot” or “clot, hydro”.
    c. If a quick code has been assigned to the mixture, a period (.) followed by the quick code.
    d. An asterisk (*), if you want to display all mixtures.



3. Double-click the mixture record.

   The **F5 - Mixture** window is displayed.

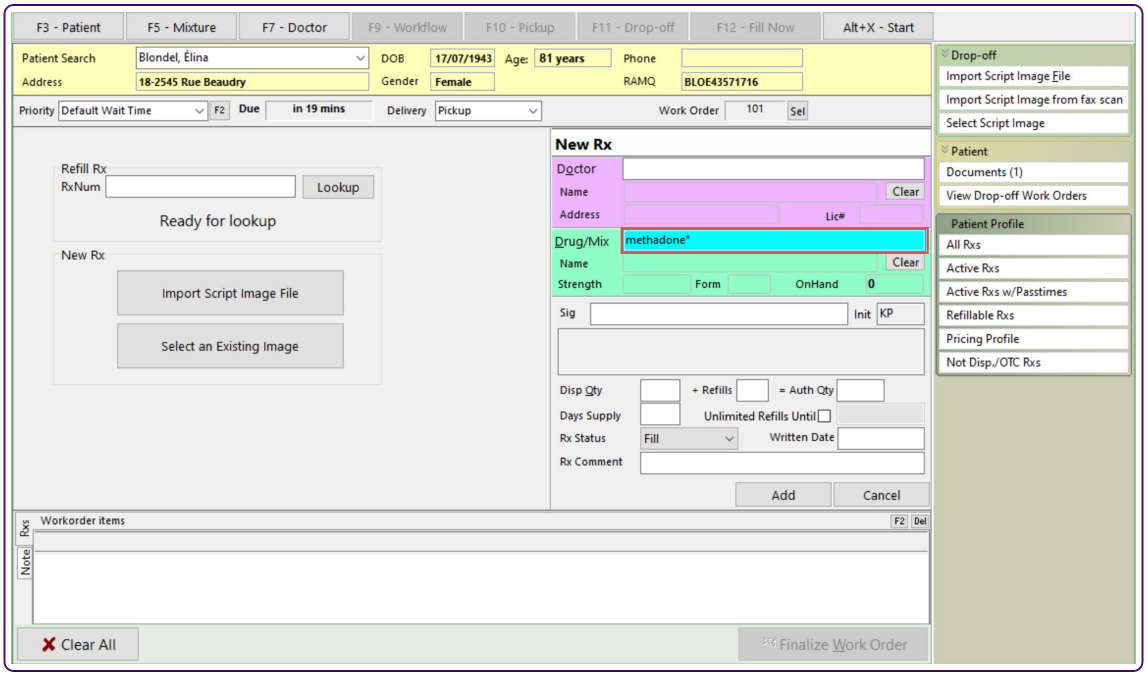


Method 2: From the F11 - Drop-Off window

1. From the **F11 - Drop-Off** window, search for and select a patient.

   The **Drug/Mix** field become available.

2. Enter any of the search criteria described in the previous section in the **Drug Search** field and press Enter.



The matching mixtures are displayed.

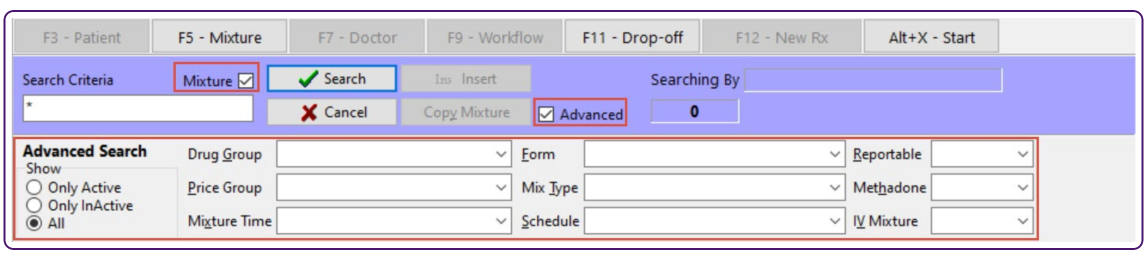
3. Double-click the applicable record.

   The **F5 - Mixture** window is displayed.

Performing an advanced mixture search

1. From the **F5 - Drug** search window, select **Mixture** and **Advanced**.

   The **Advanced Search** pane is displayed.



2. Enter your search criteria, then select **Search**.
3. To locate an inactivate drug, select the **Only Inactive** or **All** checkbox.

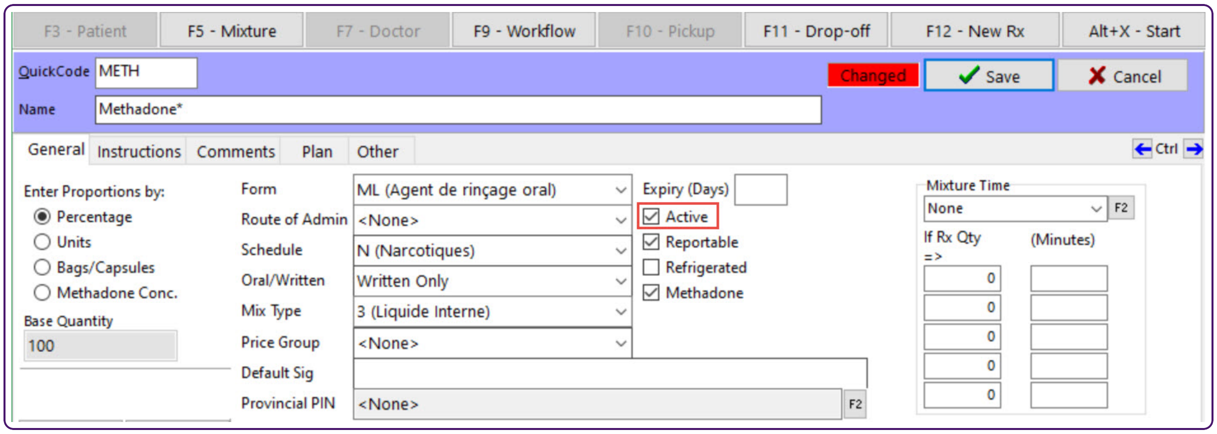
   Inactive drug records are displayed in red text in the drug search window.

Inactive mixture records

You can inactivate mixture records if they become obsolete or are no longer used. Inactivating these records ensures the regular search provides more succinct results and reduces the chances the wrong drug pack is selected for a prescription. Inactivated mixture records are not returned in the regular mixture search; you must locate them using the **Advanced** search.

Inactive drugs cannot be used in prescriptions.

- To inactivate a mixture record, deselect the **Active** checkbox in the mixture record:



Recommended mixture naming conventions

When creating a new mixture record, it is recommended that you use the following naming conventions:

1. List the ingredients in the following sequence:
    a. active ingredient(s), sequenced from highest to lowest concentration
    b. base ingredient(s), sequenced from highest to lowest proportion
2. Insert percentages/ratios after the name of a component (e.g. “Hydrocortisone Powder 1%”, rather than “1% Hydrocortisone Powder).
3. Spell out the full component names and forms when possible. If there is insufficient room, abbreviate the names in the following sequence, as needed:
    a. form
    b. base components
    c. active components

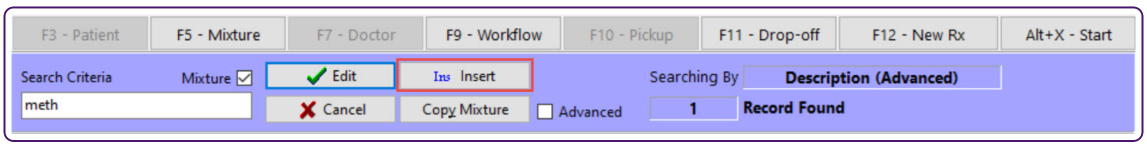
Whenever possible, enter mixture proportions by percentage so the system can automatically calculate how much of each component is needed to make the mixture, regardless of dispense quantity.

Creating a mixture record

Mixture records are added and maintained by store-level users, not the central system, which makes understanding them especially important. Avoid adding a mixture record without performing a thorough search of the system; duplicate mixture records cause confusion for the pharmacy and potentially for the patient.

> If, during mixture creation, you discover that a mixture component is inactive, you will have to open a new Kroll session to reactivate or add the component before you can continue creating the mixture record.

1. Perform a thorough search to ensure the mixture does not already exist. You will be prompted to perform an **Advanced** search for inactive drugs.
2. Select or press **Insert**.

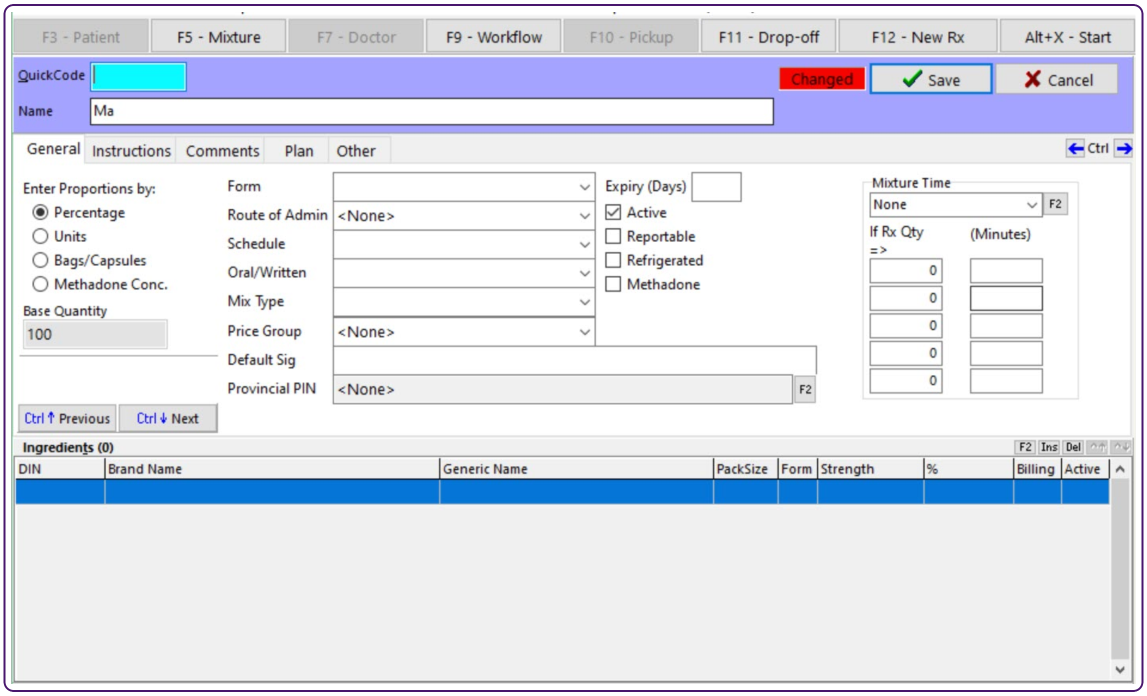


   A blank **F5 - Mixture** window is displayed.
3. Complete the mixture fields and select **Save**.

Inserting Mixture Components

A mixture record is not complete without the addition of mixture components. In fact, users cannot save a mixture record until components have been selected.

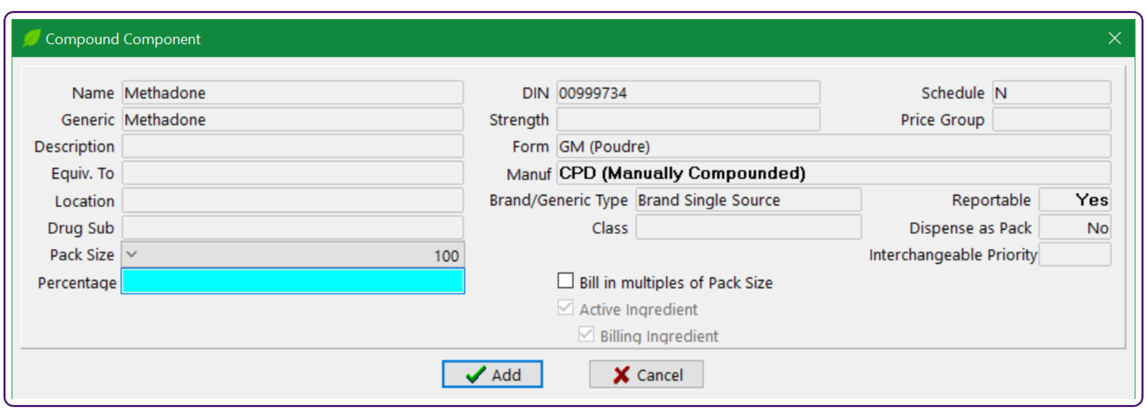
1. From the Mixture card of the mixture you want to add components to, select Ins or press Insert from the **Components** pane.



2. Perform a drug search. Highlight the applicable component and click **Select**.

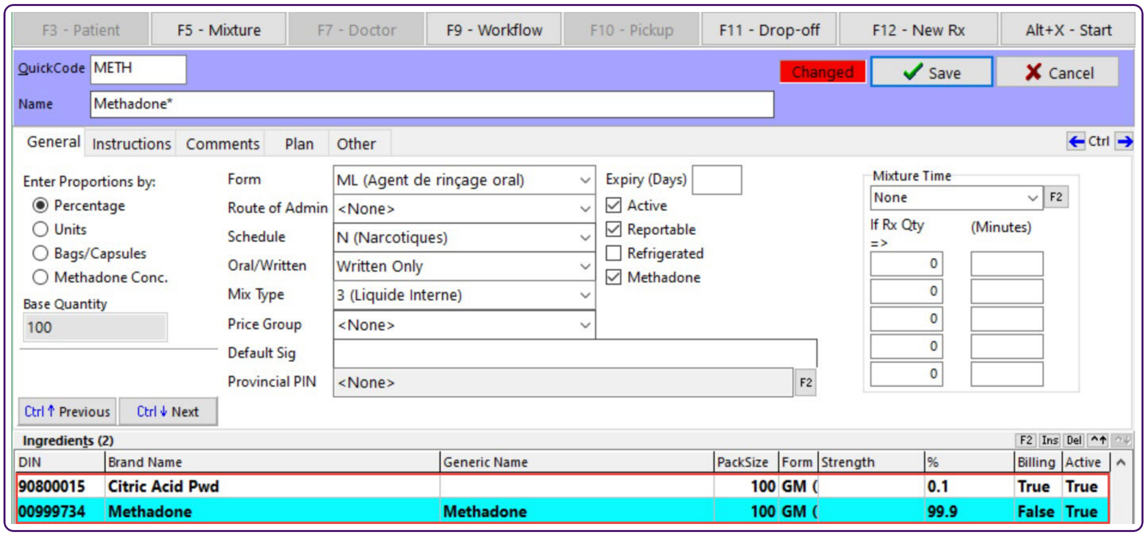
   The **Compound Component** form is displayed.

3. Select **Add**.



4. Repeat steps 2-3 for each component you want to add to the mixture. When you have finished adding components, click **Close** to exit the drug search window.

5. The drug components will appear in the **Components** pane. Click **Save** to save the mixture record.

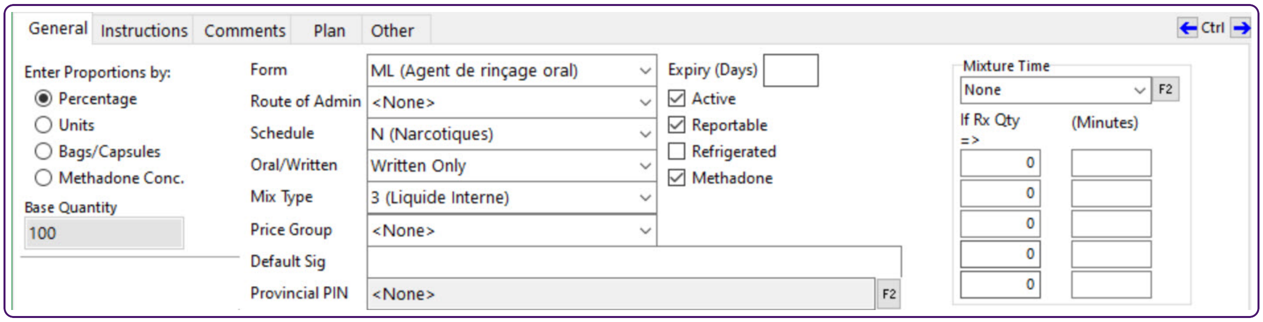


Mixture information tabs

The following sections describe the tabs at the bottom of the mixture record.

General

The **General** tab displays general information about the selected mixture.



The following table describes the fields on this tab.

Name	Description
Enter Proportions by	Select the best, or most applicable, way to enter the proportions of the mixture. ▪ Whenever possible, select **Percentage** (i.e. ratios) to enter mixture proportions, so the system can calculate how much of each ingredient is required to compound any dispensing quantity. The **Base Quantity** for mixtures entered in percentage proportions is always equal to 100. ▪ If you select **Units**, you must indicate the quantity being prepared in the **Base Quantity** field so the system to correctly calculate how much of each ingredient is required for compounding. ▪ Select **Bags/Capsules** when entering I.V. bags or pharmacy prepared capsules. In the **Base Quantity** field, enter the number of bags or capsules being prepared so the system to can calculate how much of each ingredient is required for compounding.
Base Quantity	The physical quantities of the mixture components, as described above.
Form	The physical state of the mixture, such as liquid, powder, or vaccine.
Route of Admin	How the mixture must be administered, such as injection, topical, or oral.
Schedule	The drug schedule of the mixture if it contains a controlled component.
Oral/Written	Whether the mixture requires an oral or written prescription.
Mix Type	The mixture type, as required for adjudication purposes.
Price Group	The price group, if the mixture requires special pricing. Price groups are created by the head office.
Default Sig	The SIG, if the mixture is always dispensed with the same SIG instructions. The default SIG can be overridden when the prescription is being filled.

Name	Description
Provincial PIN	The pseudo DIN the mixture is covered by. Each province's provincial plan covers certain mixtures that have assigned pseudo DINs (PINs) .
Expiry (Days)	The number of days the mixture is good for once it has been compounded, if applicable. The systems calculates and prints an expiry date on the vial label.
Active	If deselected, the mixture record is no longer being used in any active prescriptions, or is obsolete.
Reportable	If selected, the mixture contains a narcotic component; the mixture will be tracked in the **Narcotic Report**.
Refrigerated	If selected, the mixture requires refrigeration. A message appears during the filling stage to remind you that the mixture needs to be stored in a refrigerator subsequent to preparation.
Methadone	If selected, the record is a methadone mixture, and the "carries" and other methadone-related dispensing functions are activated.
Mixture Time	Use the mixture time chart to configure the **Mixture Fee** that will be charged to the patient, based on the amount of mixture being dispensed. You can add up to five mixture tiers. If you selected **Bag/Capsules** as the method of entering proportions, a single **Charge (Minutes)** field is displayed. If you selected Percentage or Units as the method of entering proportions, a table is displayed. Each row in the table represents a pricing tier: ▪ The first row represents the minimum mixture fee charged to the patient. The Rx quantity should equal zero because any dispense quantity greater than zero requires a minimum base fee to be charged. ▪ The second row represents the second tier for the mixture fee. The Rx quantity entered here should be the threshold value where making more than that quantity will mean graduating to the next tiered fee. ▪ The last entry (the final pricing tier) represents the maximum mixture fee charged. Any dispense quantity greater than the Rx quantity listed here will charge the maximum mixture fee only. For more information, see "Setting the minimum and maximum mixture fees" (page 150) .

Instructions

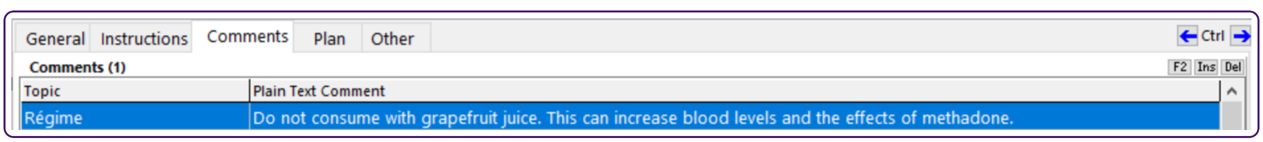
The **Instructions** tab records any special instructions that must be followed when compounding the mixture (e.g., heating time, use of mixing solutions).

The following table describes the fields on this tab.

Name	Description
Handling Instructions	Any instructions that must be followed when preparing the compound.
Batch Quantity	The volume of the batch. If a mixture is dispensed frequently, batch quantities of it may be compounded at the store level. The system will deduct quantities dispensed against the value entered here. This is the equivalent to the **On Hand** value for a drug record.
Print Instructions at Fill	Whether you want instructions to print when the Rx for the mixture is filled (Never, Always, or Prompt).
Print both Batch and Fill Instructions	If selected, both batch and fill will be printed when an Rx for the mixture is filled or batched.
Add Component Names to Instructions	If selected, the names of the mixture components listed in the box to the left are included in the instructions field.

Comments

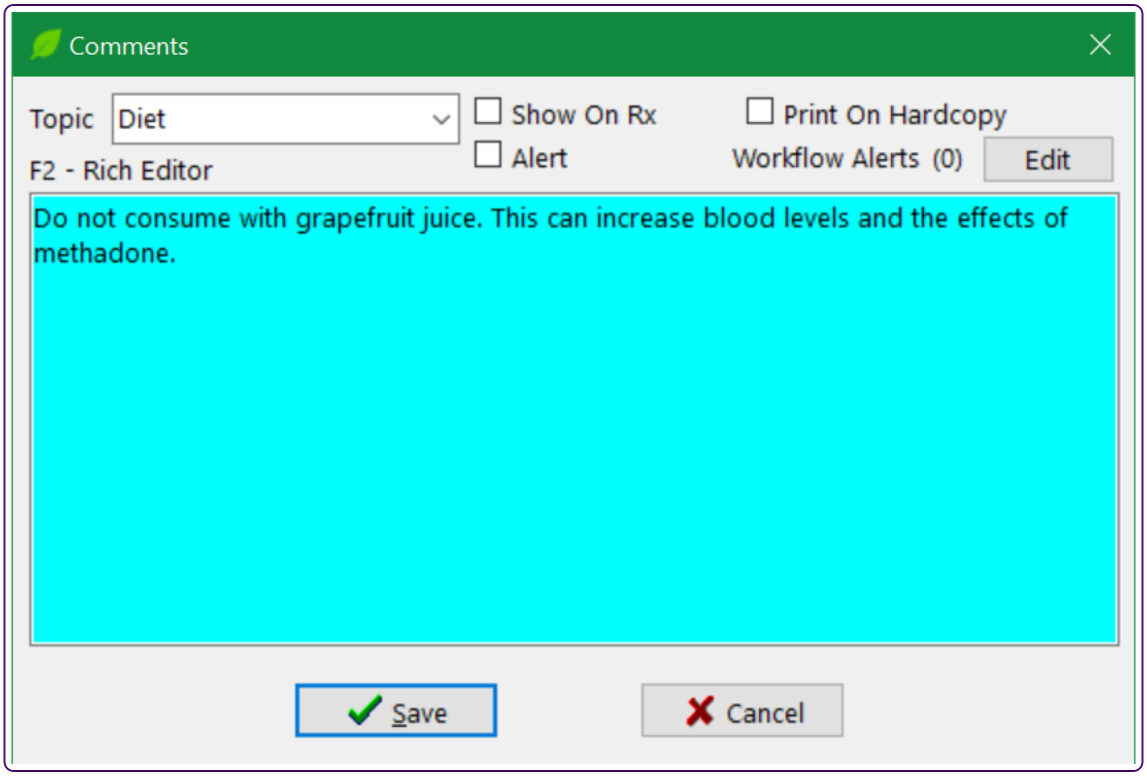
The **Comments** tab displays general comments about the record.



1. To insert a new comment, select **Ins** or press Insert.

   The **Comments** pop-up is displayed.

2. Select a **Topic** and enter your comment.

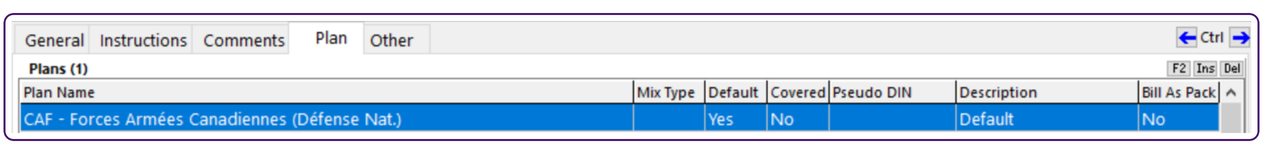


3. To show the comment when filling a prescription, select **Show On Rx**.
4. To show a pop-up message during filling that indicates a comment is present, select **Alert**.
5. To include the comment on the hard copy prints during filling, select **Print On Hardcopy**

   This checkbox can only be selected for one comment, as there is limited space on the hardcopy.
6. To display a comment during one or more steps in the workflow, select the **Edit** button adjacent to **Workflow Alerts**, then select one or more workflow steps and select **OK**.
7. Select **Save**.

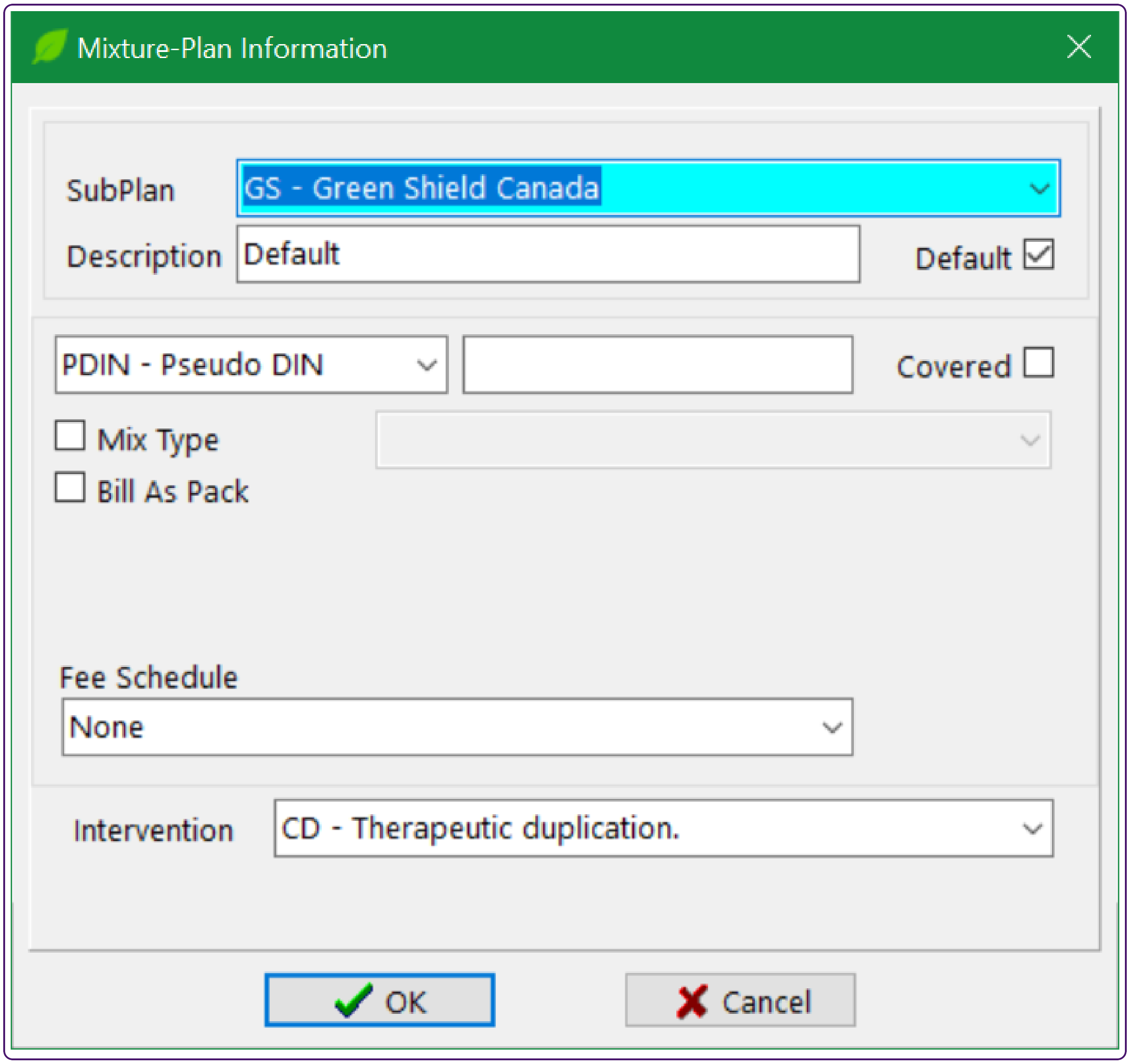
Plan

The **Plan** tab displays the **Pseudo DINs** that are adjudicated to third parties for purposes of reimbursement. Mixture Pseudo DINs must be added and maintained by store-level users.



- To add a new plan, select **Ins** or press Insert.

  The **Mixture-Plan Information** form is displayed.



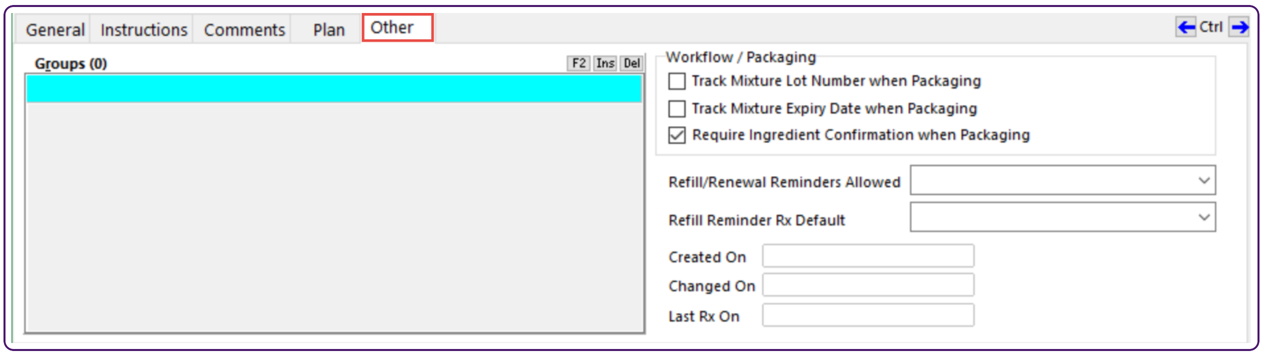
The following table describes the fields on this pop-up.

Name	Description
SubPlan	The third party plan associated with the pseudo DIN from the dropdown menu.
Description	A general description or a note associated with the pseudo DIN. If no value is entered, the value is set to Default.
Default	If selected, the system automatically sends the pseudo DIN to the third party plan whenever an Rx is processed for the mixture. This is selected by default.
<Unnamed DIN fields>	The first field lists the type of DIN, and the second contains the 8-digit drug identification number.
Covered	If selected, the associated third party covers the costs of the medication.

Name	Description
Mix Type	If selected, the third party plan requires submission of a **Mix Type** that differs from what is set on the **Mixture Record**. This field is commonly used for Methadone mixtures billed to Green Shield.
Bill As Pack	If selected, the mixture needs to be billed to the third party by packs rather than by units.
Fee Schedule	The fee category the mixture will be billed as to the third party plan.
Intervention	The applicable intervention code.

Other

The **Other** tab displays information about when the mixture was created, last changed, and last used in an Rx. It also lists the groups to which the mixture belongs.



The following table describes the fields on this tab.

Name	Description
Groups	The groups the mixture belongs to. Mixtures can be included in a group for reporting or dispensing purposes. For example, a group called "Methadone" might be attached to all methadone mixture records. Mixture groups are created by head office. To add a group, select Ins, then move groups from **Available Groups** to **Selected Groups**.
Track Mixture Lot Number when Packaging	If selected, the lot number for each component must be entered/scanned during mixture packaging verification (filling).
Track Mixture Expiry Date when Packaging	If selected, the expiry date for each component must be entered/ scanned during mixture packaging verification (filling).
Require Ingredient Confirmation when Packaging	If selected, the UPC for each component must be scanned during mixture packaging verification (filling).

Name	Description
Refill/Renewal Reminders Allowed	Whether refill and renewal reminders are allowed.
Refill Reminder Rx Default	Whether refill reminders for this drug are enabled by default. If set to Yes, refill reminders are automatically sent, and if set to No, they are not. If set to Prompt, the user is asked if the Rx qualifies for refill reminders.
Created On	The date the mixture record was created.
Changed On	The date the mixture record was last modified.
Last Rx On	The date an Rx was last filled for the mixture.

Mixture pricing

Mixture pricing is calculated using the following elements:

- Price/Minute: the dollar amount charged for each minute of mixture time.

  This value is centrally maintained according to provincial standards.
- Mixture Fee: this is calculated based on the quantity dispensed in the prescription.

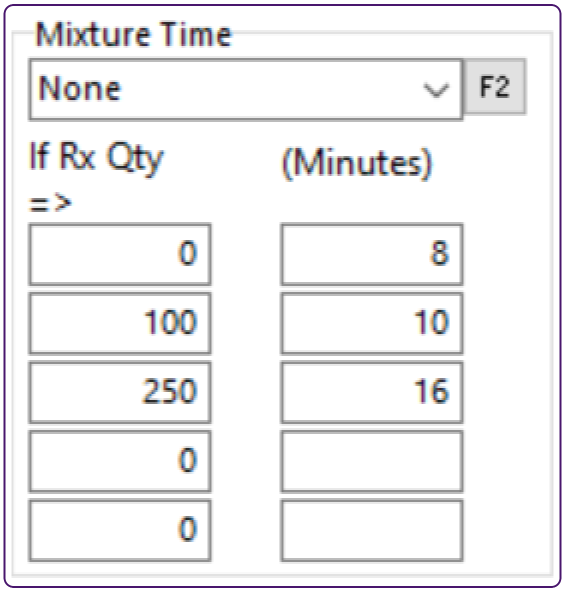
  This value is derived from the **Mixture Time Chart** on the mixture record.
- Cost of the components: the cost of each component.

  This is derived from acquisition cost for mixture components (drug records). Acquisition cost is maintained through invoice receiving or catalogue feeds.
- Markup Strategy: the amount added to cover overhead and profit.

  This is set by home office and centrally maintained.

Setting the minimum and maximum mixture fees

- From the mixture record, refer to the **Mixture Time** chart.



The first line of the chart identifies the minimum fee charged for the mixture; in the chart above, even if the pharmacy makes one gram (1g) of mixture, a minimum of 8 minutes is charged.

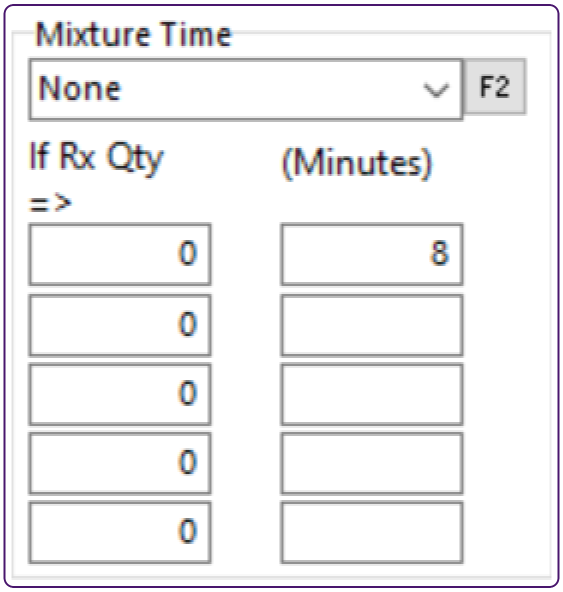
The last line of the chart identifies the maximum fee charged for the mixture; in the chart above, even if the pharmacy makes 1,000g of mixture, a maximum of 16 minutes will be charged.

The lines (or tiers) in-between the minimum and maximum charge account for prescriptions where the dispense quantity lies between the two barrier points. In the chart above, if a prescription has a dispense quantity of 100g, 10 minutes of mixture time will be charged.

- For more information on these fields, see "General" (page 143).

Setting a flat mixture fee

If the mixture fee should not vary, regardless of the amount dispensed, enter a flat fee. To set a flat fee, enter a single line in the **Mixture Time** chart. For example, in the following chart, any dispense quantity greater than zero will be charged 8 minutes of mixture time.

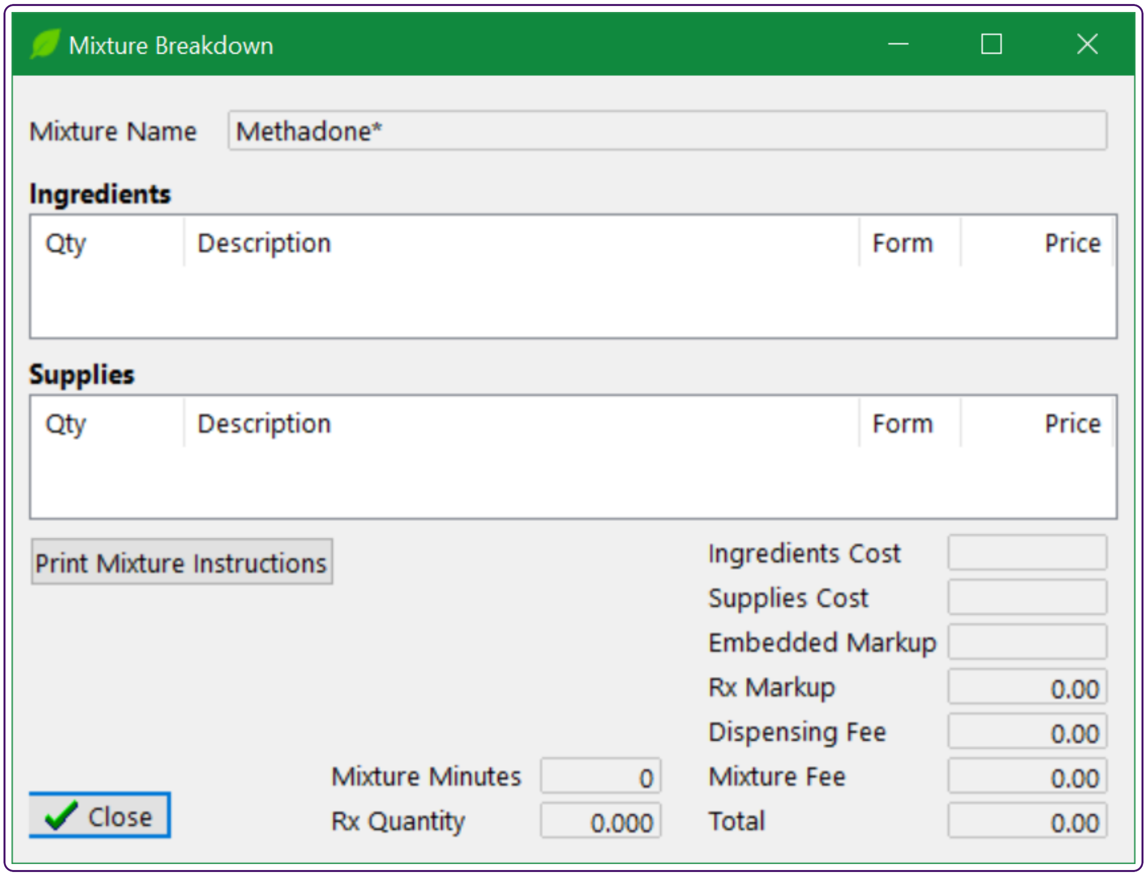


Displaying the mixture breakdown

When you are filling a prescription for a mixture, it is recommended that you review the **Mixture Breakdown** before adjudicating the Rx. The **Mixture Breakdown** shows the exact dollar amounts for each of the elements in the mixture.

1. From the **F12** window, all prescription information should be entered and populated:
2. From the prescription sidebar, select **Mixture Breakdown**, or press ALT+V+M.

   The **Mixture Breakdown** pop-up is displayed.



The following table describes the fields on this pop-up.

Name	Description
Total Base Cost	The total acquisition cost of all components.
Embedded Markup and **Rx Markup**	These values are centrally maintained.
Dispensing Fee	The regular and customary Rx dispensing fee. This value is centrally maintained.
Mixture Fee	This is based on the **Mixture Time** chart and the quantity dispensed
Mixture Minutes	Used to calculate the **Mixture Fee**.
Rx Quantity	The quantity to be dispensed for the Rx.
Total	The total cost of the mixture.
Print Mixture Instructions	Select to comments from the **Instructions** tab of the mixture record as well any other information.

Chapter 11

Prescriber records

Prescriber records contain the contact details, licence numbers, and other information about prescribers

Searching for a prescriber record

Method 1: From the F7 - Doctor window

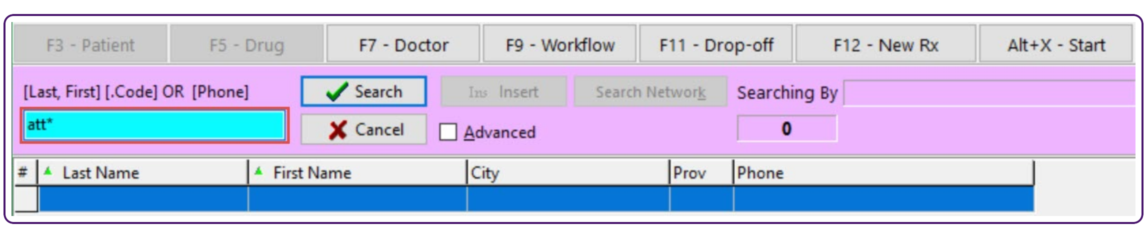
1. From the **Alt-X Start** window, select **F7 - Doctor**.
2. Enter one of the following prescriber search criteria, then select **Search**:
   - Last name, first Name.

     For example, one of the following: “Doe, Jane”, “doe,j”, “Doe”, or “,Jane”
   - A period (.) and the patient quick code.

     For example, ".DoeJ”
   - A 7 or 10-digit phone number.

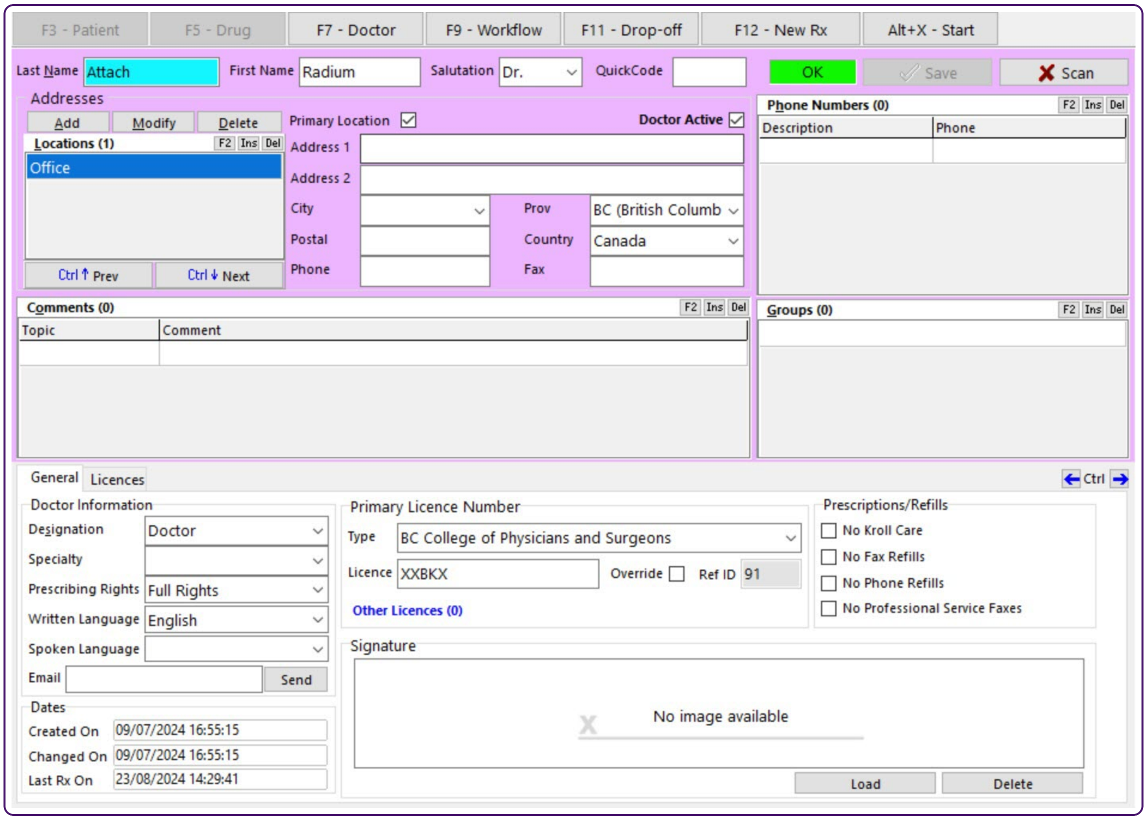
     For example, "800-263-5876" or "263-5876"
   - A number sign (#) and the third party billing number.

     For example, "#123456789"
   - An asterisk (*) to return all of the patients in the database.



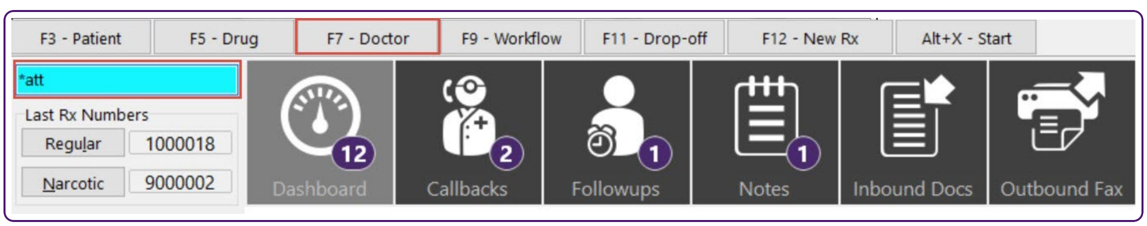
3. Double-click the prescriber record.

   The **F7 - Doctor** window is displayed.



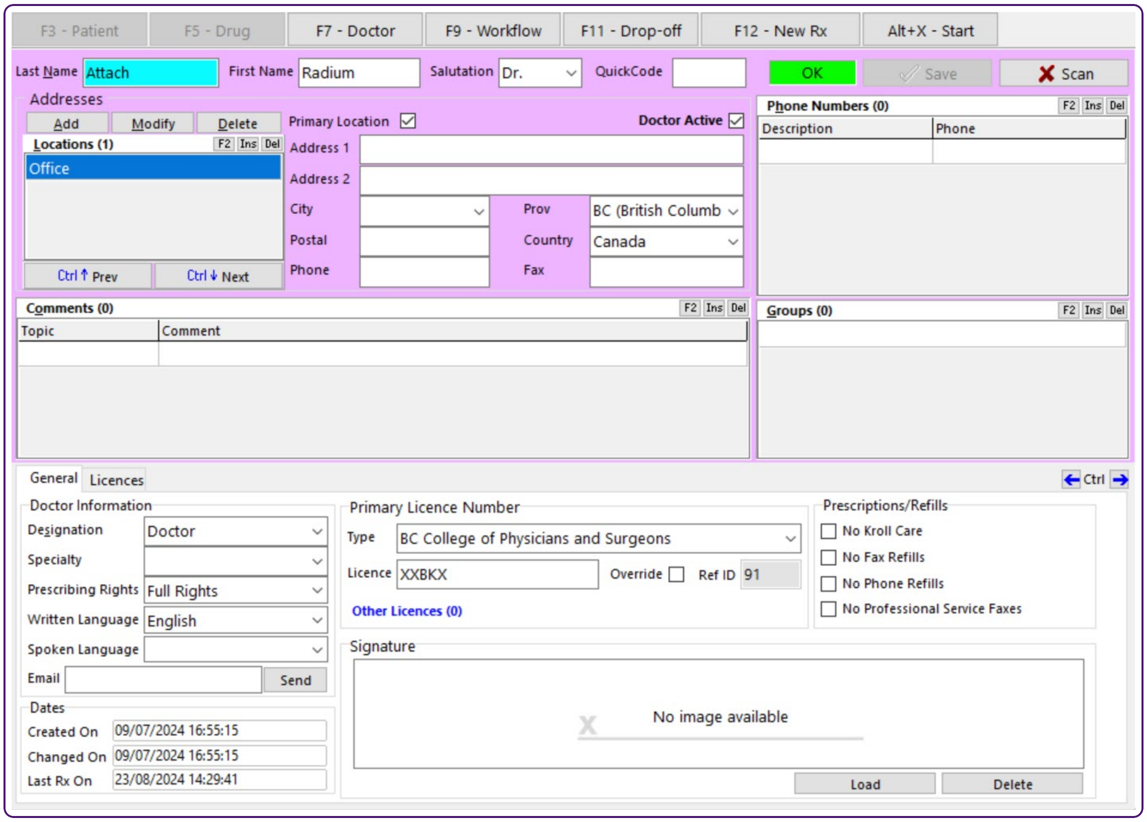
Method 2: From the Alt - X Start window

1. From the **Alt - X Start** window, enter any of the search criteria in the previous section into the Universal Search Field.
2. Select **F7 - Doctor**.



3. If the criteria you entered matches a single prescriber, they are displayed. If it matches multiple prescribers, a list of prescribers is displayed. Double-click the applicable prescriber.

   The **F7 - Doctor** window is displayed.

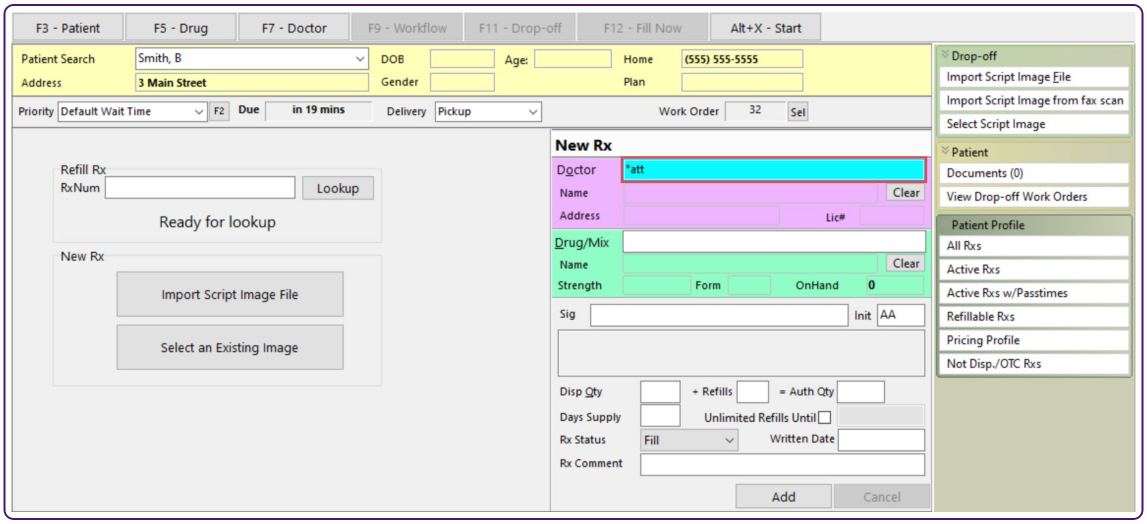


Method 3: From the F11 - Drop-Off window

1. From the **F11 - Drop-Off** window, search for and select a patient.

   The **Doctor** field is enabled.

2. In the **Doctor** field, enter any of the search criteria described in the previous section, then press **Enter**.

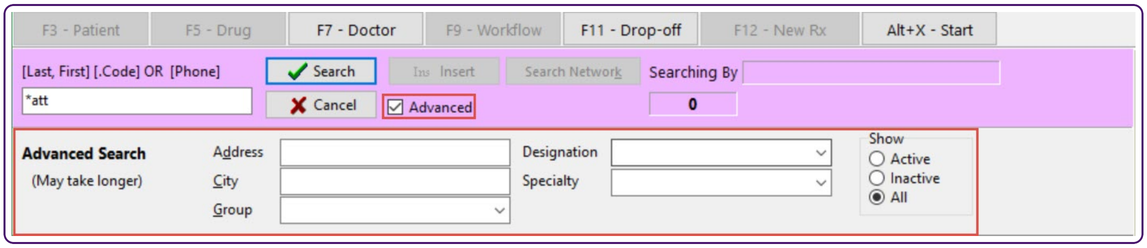
   

3. If the criteria you entered matches a single prescriber, they are displayed. If it matches multiple prescribers, a list of prescribers is displayed. Double-click the applicable prescriber.

Performing an advanced prescriber search

1. From the **F7 - Doctor** search window, select **Advanced**.

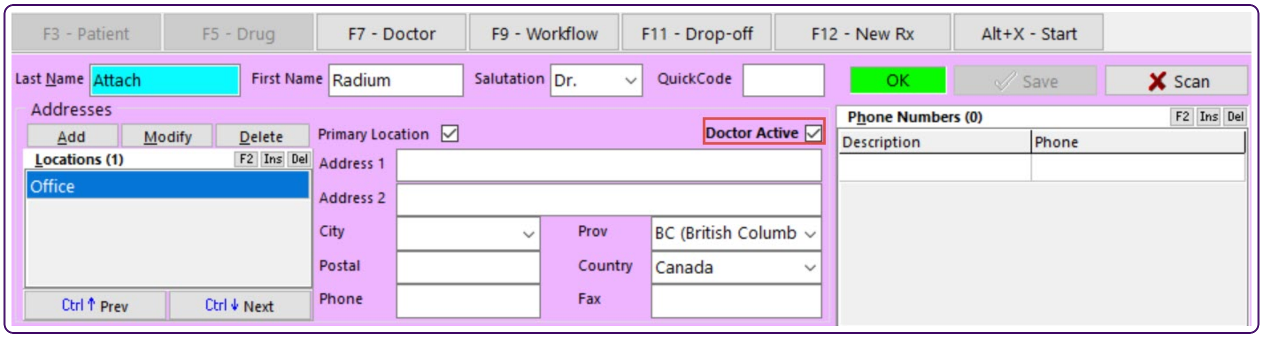
   The **Advanced Search** pane is displayed.

2. Enter the applicable search criteria, then click **Search**.

Inactive prescriber records

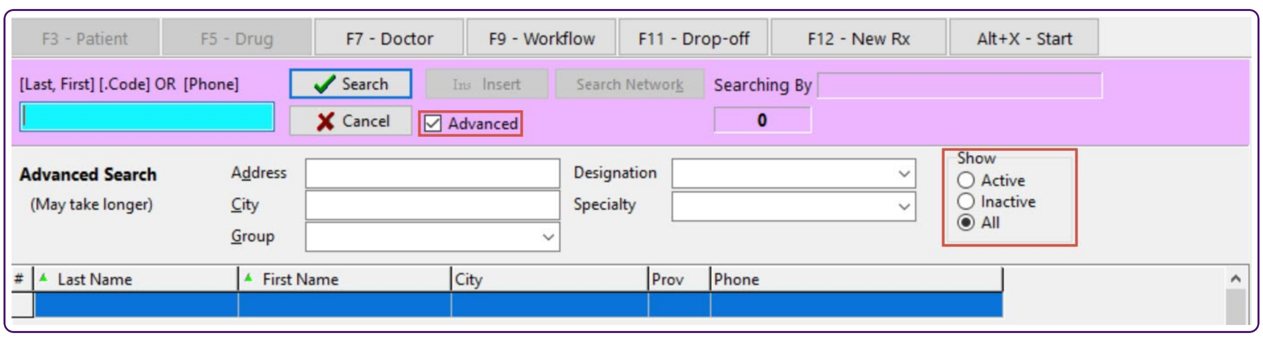
To inactivate a prescriber record, deselect its **Doctor Active** checkbox. Inactive prescribers do not show up in the regular prescriber search, but you can locate them using an **Advanced** search.



Inactive prescriber records cannot be used in prescriptions. The **Active** checkbox must be selected.

There are various reasons why you may choose to inactivate a prescriber record. For example, a prescriber may be inactivated because they have retired, or has been relocated to a different region. Inactivating these records allows the regular search to provide more succinct results; this reduces the chances of selecting the incorrect prescriber into a prescription.

To locate inactivated prescriber records in the system, perform an Advanced search. Ensure the **Inactive** checkbox or **All** option is selected.



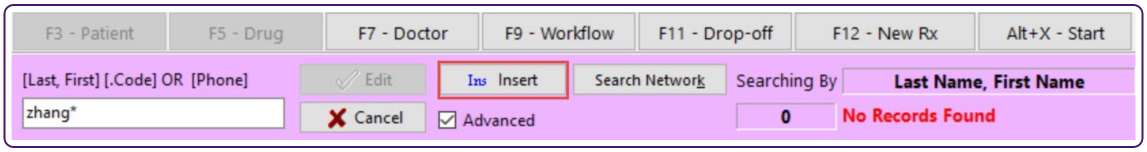
Inactive prescriber records are displayed in red font in the prescriber search window.

Creating a prescriber record

1. Perform a thorough search to ensure the prescriber does not already exist in the database.

   You are prompted to perform an **Advanced** search for inactive prescribers.

2. Select or press **Insert**.



A blank **F7 - Doctor** window is displayed.

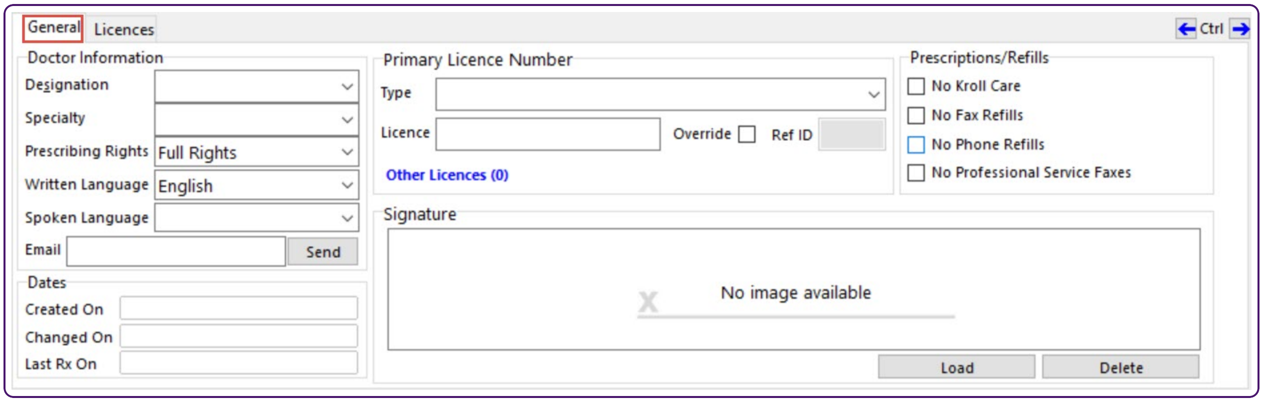
3. Complete the prescriber fields then select **Save**.

Prescriber record fields

The following table describes the fields in the prescriber record.

Name	Description
Last Name, **First Name**	The name of prescriber (do not add any symbols to these fields).
Salutation	Dr., Miss., Mr., Mrs., or Ms.
Quick Code	An optional code to use when searching the prescriber. For example, you might enter a "THOMG" code for “Dr. Gary Thomson”. This field can also be used to identify doctors working in the same location. For example, if you enter “CLINIC” for all doctors working at the nearby clinic, you can easily locate them by searching for “.CLINIC”.
Locations	If the physician practices in more than one physical location, you can enter more than one address for them.
Primary Location	If the you have entered more than one location for the prescriber, select this checkbox when the primary location is selected from the **Locations** section.
Address, **City**, **Province**, **Postal**, **Country**	The prescriber's address.
Comments	Any comments about the prescribers. For more information, see "Comments" (page 145).
Phone Numbers	The prescriber's phone numbers.
Groups	The groups the prescriber belongs to. Prescribers can be included in a group for reporting or dispensing purposes. For example, a prescriber group called “Walk-In Clinic” could be created and attached to the prescribers' work at the walk-in clinic. Prescriber groups are created by head office. To add a group, select Ins, then move groups from **Available Groups** to **Selected Groups**.

General Information tab



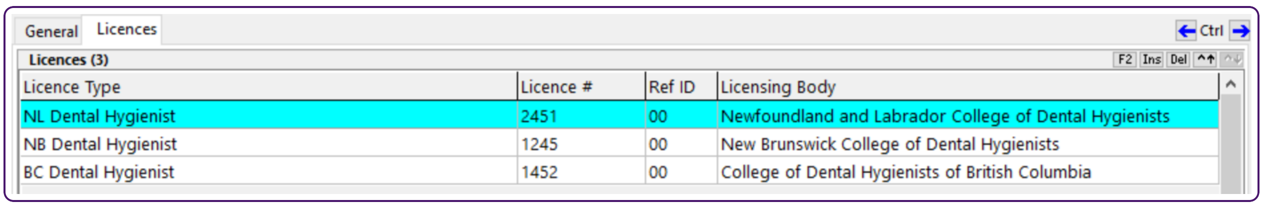
The following table describes the fields on the **General** tab.

Name	Description
Designation	The type of prescriber.
Specialty	The prescriber's specialty.
Dispensing Rights	One of the following: ■ Full Rights: The prescriber can dispense Schedule 1, 2, 3, targeted, controlled and narcotic prescriptions. ■ No Narcs: The prescriber cannot dispense narcotic substances. If they attempt to process a narcotic Rx, the system displays a warning message and the process is halted. ■ No Narcs or Controlled: The prescriber cannot dispense narcotic or controlled substances. If they attempt to process a narcotic or controlled Rx, the system displays a warning message and the process is halted.
Written Language and **Spoken Language**	The prescriber's written and spoken language. These fields are for informational purposes only; they are not tied to any system functionality.
Email	The prescriber's email address. Select **Send** to send an email to that address.
Created On	The date the prescriber record was created.
Changed On	The date the prescriber record was last modified.
Last Rx On	The date an Rx was last filled by this prescriber.
Primary License Number	The **Type** and **License** number of the prescriber's primacy license. Select **Override** to change the **Ref ID**. For information on where these licenses are maintained, see "Licenses tab" (page 160).

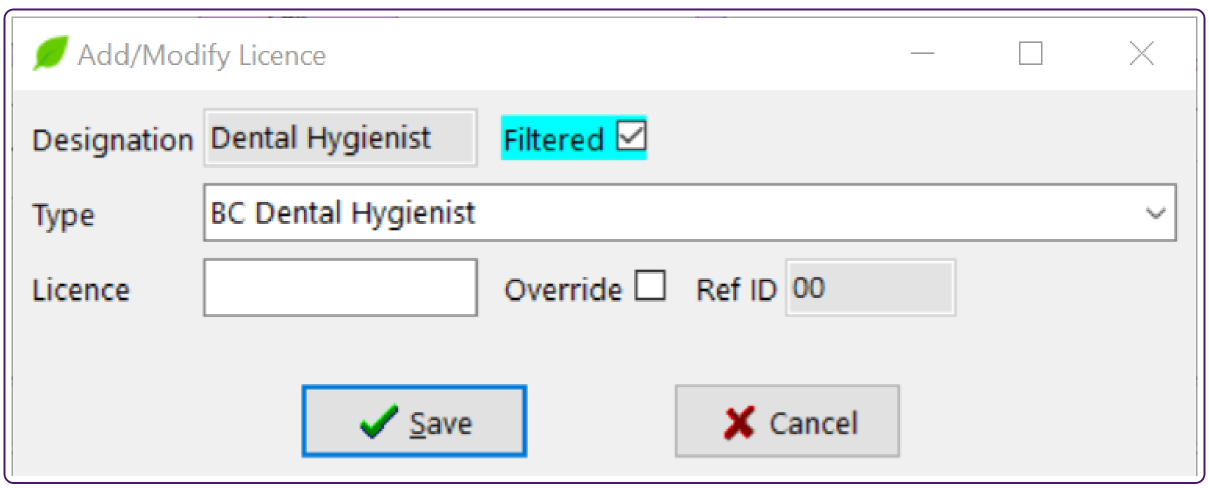
Name	Description
Signature	If your terminal is hooked up to a document scanner, you can load the prescriber signature into the system by scanning a written prescription and cropping the signature. The signature will be available during “Check” stages, for cross-checking. To load a prescriber signature, feed the written prescription into the document scanner, then select **Load** from the prescriber record, and click and drag a box around the signature portion of the prescription. Select **Save** or press Enter to save it.
No Kroll Care	If selected, Kroll Care will not be generated for this prescriber's prescriptions.
No Fax Refills	If selected, the prescriber does not accept fax requests for prescription refill.
No Phone Refills	If selected, a warning message appears when **Call Doctor** is selected from the Rx Filling window, or the patient profile, indicating that the prescriber does not accept phone requests for refills.

Licenses tab

You can use the **Licenses** tab to maintain the prescriber's licenses.



When you select Ins or press Insert, the Add/Modify License pop-up is displayed.



The following table describes the fields on the tab and pop-up.

Name	Description
Designation	The type of prescriber, as set from the **General** tab.
Filtered	If selected, the **Type** field is filtered to display only those licenses that correspond to the prescriber's **Designation**.
License Type/Type	The type of license.

Name	Description
License #/License	The license number.
Override	If select, the **Ref ID** field is enabled.
Ref ID	The reference ID for the selected **Type**. This field is read-only.
Licensing Body	This read-only field populated by the system, based on the **License Type**.

Chapter 12

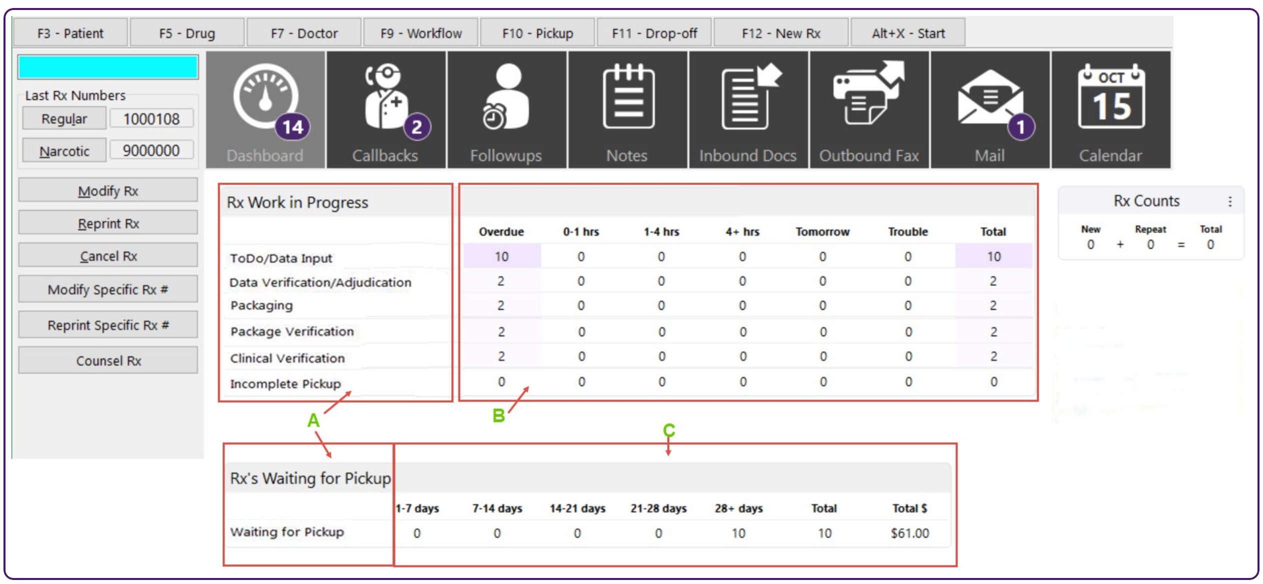
Workflow management

You can use workflow management to process prescriptions in a structured and standardized manner. In this guide, you can see how a typical prescription progresses through the Kroll system, with the following workflow elements activated:

- Multiple workflow queues
- No hardcopy generation
- Electronic signature capture
- Thermal printing

Workflow management can be tailored to meet the needs of any pharmacy environment. For more information, please contact the [Kroll sales team.](#)

Start window



Workflow queues (A)

The following table describes the workflow queues in the sequence they are completed. The queues in use may vary by implementation.

Queue	Description
ToDo/Data Input	Items in this queue require data to be entered in order to complete the record. Use the scanned image of the written prescription as a reference and enters the appropriate information. Refill prescriptions ordered via an IVR system are placed in this queue for processing.
Data Verification/Adjudication	A pharmacy team member confirms the data entered in the previous step is correct by comparing it to the scanned image of the original written prescription. The internal DUE process then commences and any potential ADRs are identified and managed. Adjudication occurs if the prescription will be paid by the patient's third party plan.
Packaging	The selected prescription is displayed on the **Packaging** window. The pharmacy team member then scans the UPC code on the product to confirm the correct item has been selected from the shelf. The pharmacy team member can also record the lot number and expiry date for each pack.
Package Verification	The selected prescription is displayed on the **Package Verification** window. The pharmacy team member, with vial in hand, compares what is on it to the original prescription, the Kroll entry, and the label.
Clinical Verification	The pharmacist evaluates the prescription and determines if it is clinically correct for the patient.
Incomplete Pickup	This queue should never have prescriptions in it. If a prescription is listed, it means that something occurred during pickup that needs to be resolved.
Waiting for Pickup	Prescriptions stay in this queue until they have been picked up out of Kroll.

Grid (B)

The numbers on the grid represent the number of prescriptions currently located within each queue and when they are due to be completed. You can refer to this queue to see where the bulk of the work is, and adjust your operations accordingly.

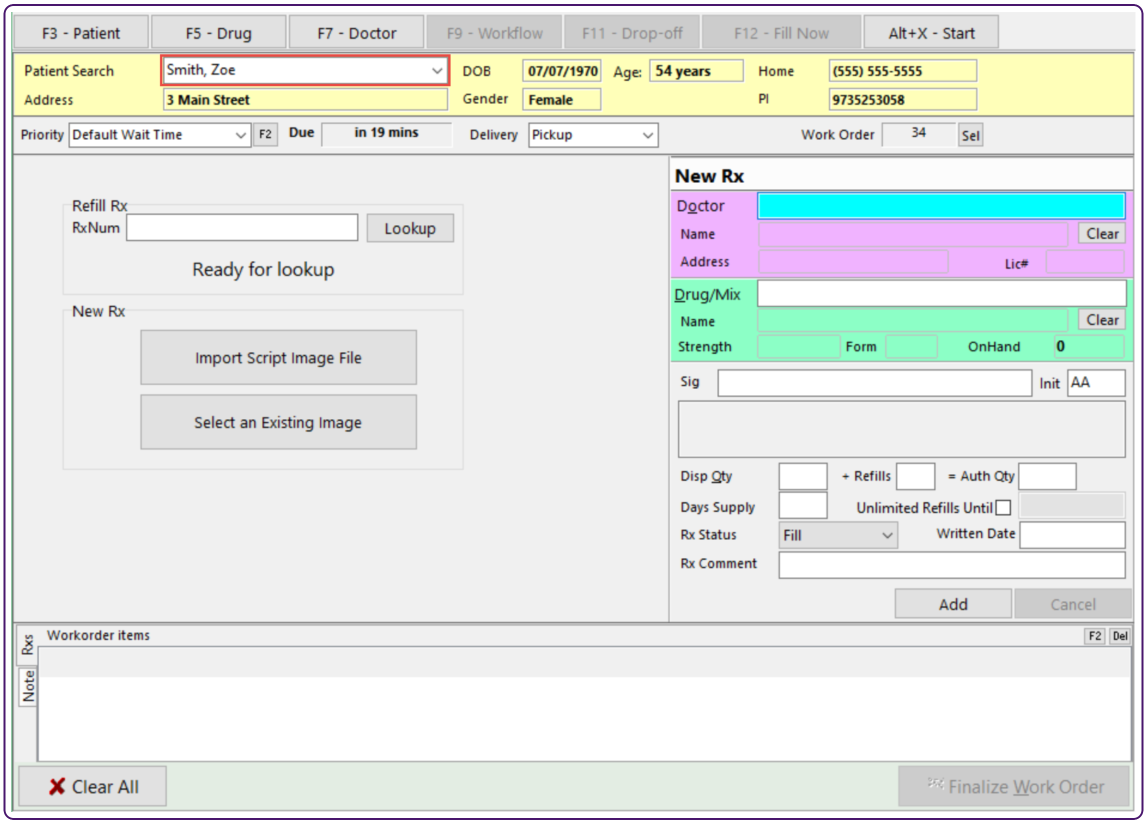
Pickup Grid (C)

This shows how many prescriptions are in the pharmacy's pickup bin and how long they have been there. The **Total** and **Total$** values should equal the total number of prescriptions in the pickup bin, and their total coat (actual acquisition cost), respectively.

Drop-off

You can use the **F11 - Drop-off** window to enter Rx information while the patient is still in the pharmacy.

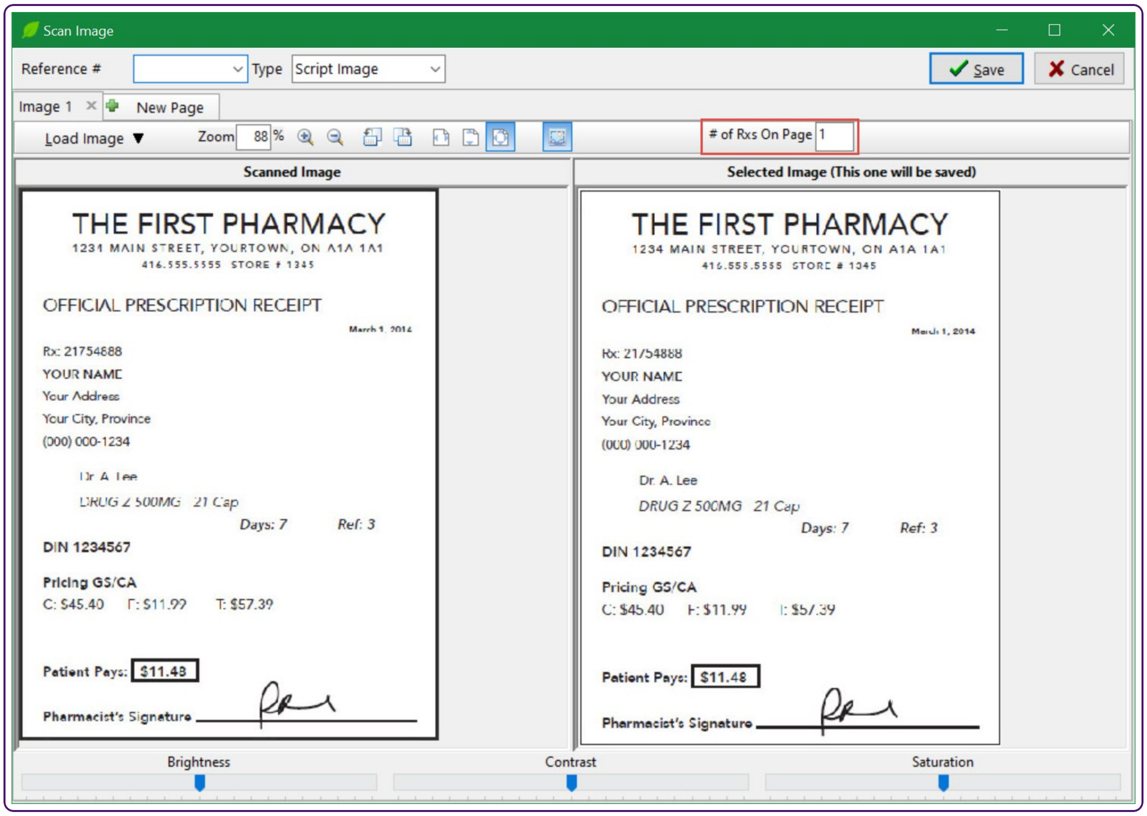
1. From the **F11 - Drop-off** window, search for and select the patient, then select the **Drop-off** button.



2. Place the written prescription face down in the document scanner and select **Import Script Image File**.

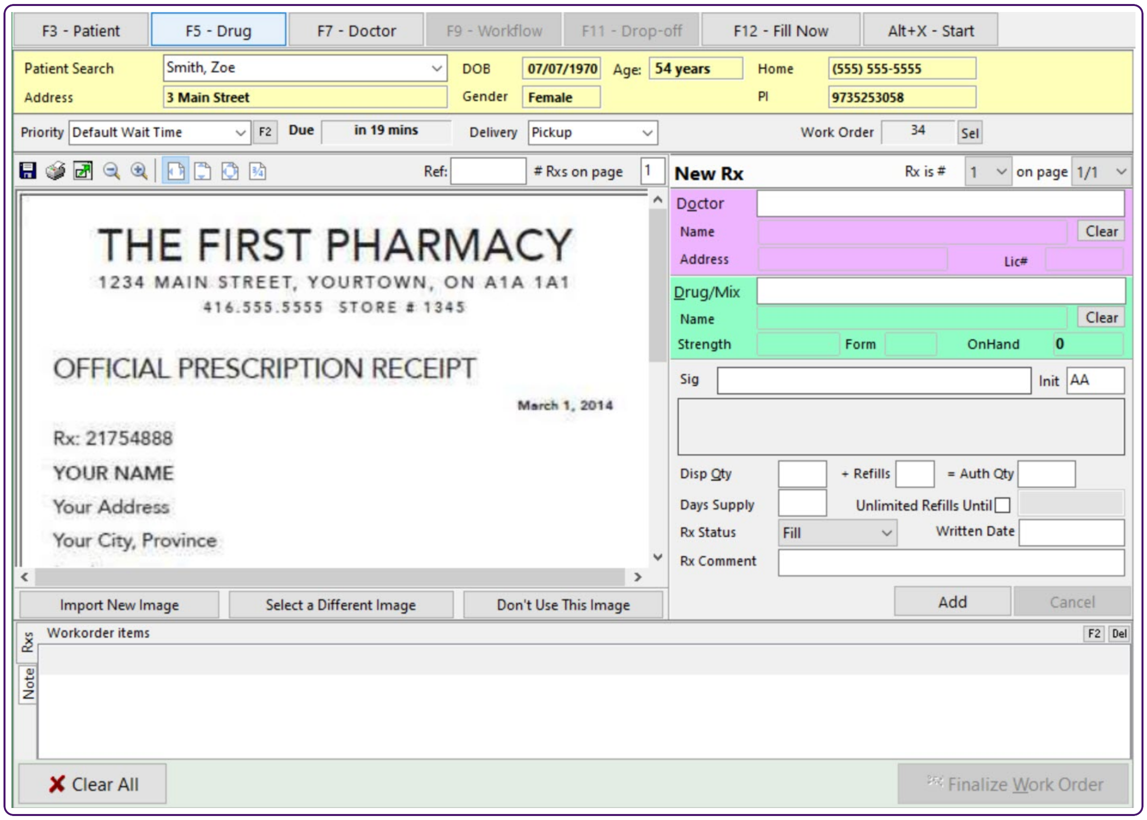
   The **Scan Image** window appears with the scanned image displayed.

3. If the written prescription contains multiple items, enter the total number of items in the **# of Rxs On Page** field.



4. Select **Save**.

   The prescription image appears in the **Drop-off** window.

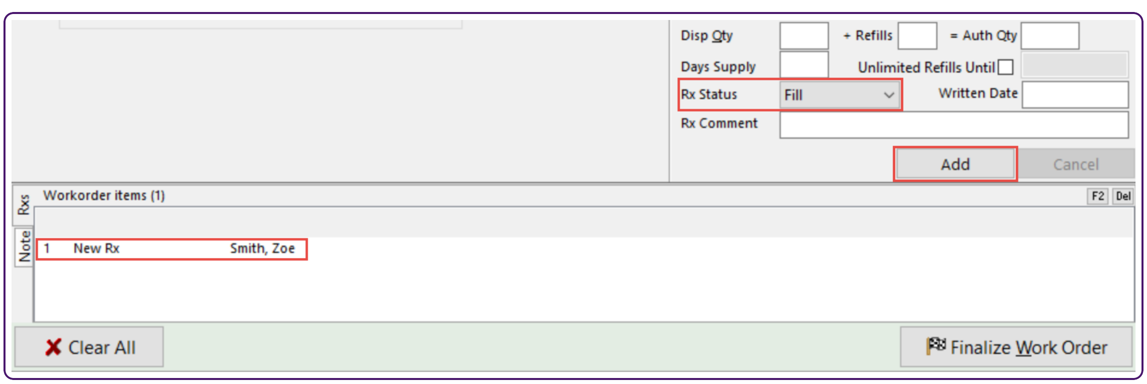


5. Ask the patient when they want to pick up the prescription, and select their response from the **Rx Status** field.

   This selection dictates how the Rx will progress through the system.

6. Select **Add**.

   The prescription is added to the work order.



If the pharmacy is not busy, you can complete the Rx fields on the **Drop-off** window before adding the prescription to the work order.

7. Repeat the above steps as needed to add all of the patient's prescriptions.
8. Select **Finalize Work Order**.

   The prescription record progresses to the next workflow step and the **Drop-off** window is refreshed. You can begin serving the next patient in line.

Workstations

You may choose to implement a structured approach to prescription processing, wherein you assign a specific function to each workstation in your pharmacy. For example, your store might have the following workstations:

1. Drop off workstation, which is equipped with a barcode scanner and image scanner.
2. ToDo/Data input workstation
3. Data verification/Adjudication workstation
4. Packaging workstation, which is equipped with a thermal printer and barcode scanner
5. Package verification workstation, which is equipped with a digital signature pad
6. Clinical verification workstation, which is equipped with a digital signature pad and thermal printer.
7. Pickup workstation, which is equipped with a digital signature pad and barcode scanner.

To assign each workflow queue to a separate workstation:

- From the applicable workstation, select the **F9 - Workflow** window, then select the workflow queue(s) you want to activate for that workstation.

If you do not have a large number of workstations, you can still designate specific workstations for specific tasks by turning on the queues that you want activated at the current workstation. The only limitation is the peripheral equipment. For example, the packaging workstation must have a barcode scanner and thermal printer associated with it, and the clinical verification workstation must have a digital signature pad and a thermal printer associated with it.

In a multi-workstation scenario, it is recommended that at least one workstation be set up as an “all- in-one” workstation, so that a single pharmacist working alone can complete all of the workflow steps from one spot in the dispensary. The following peripheral equipment must be associated with this workstation:

- Thermal printer for vial labels
- Thermal printer for receipts, wallet cards, and privacy labels
- Barcode scanner
  - For product scanning at packaging
  - For prescription scanning at pickup
- Digital signature pad

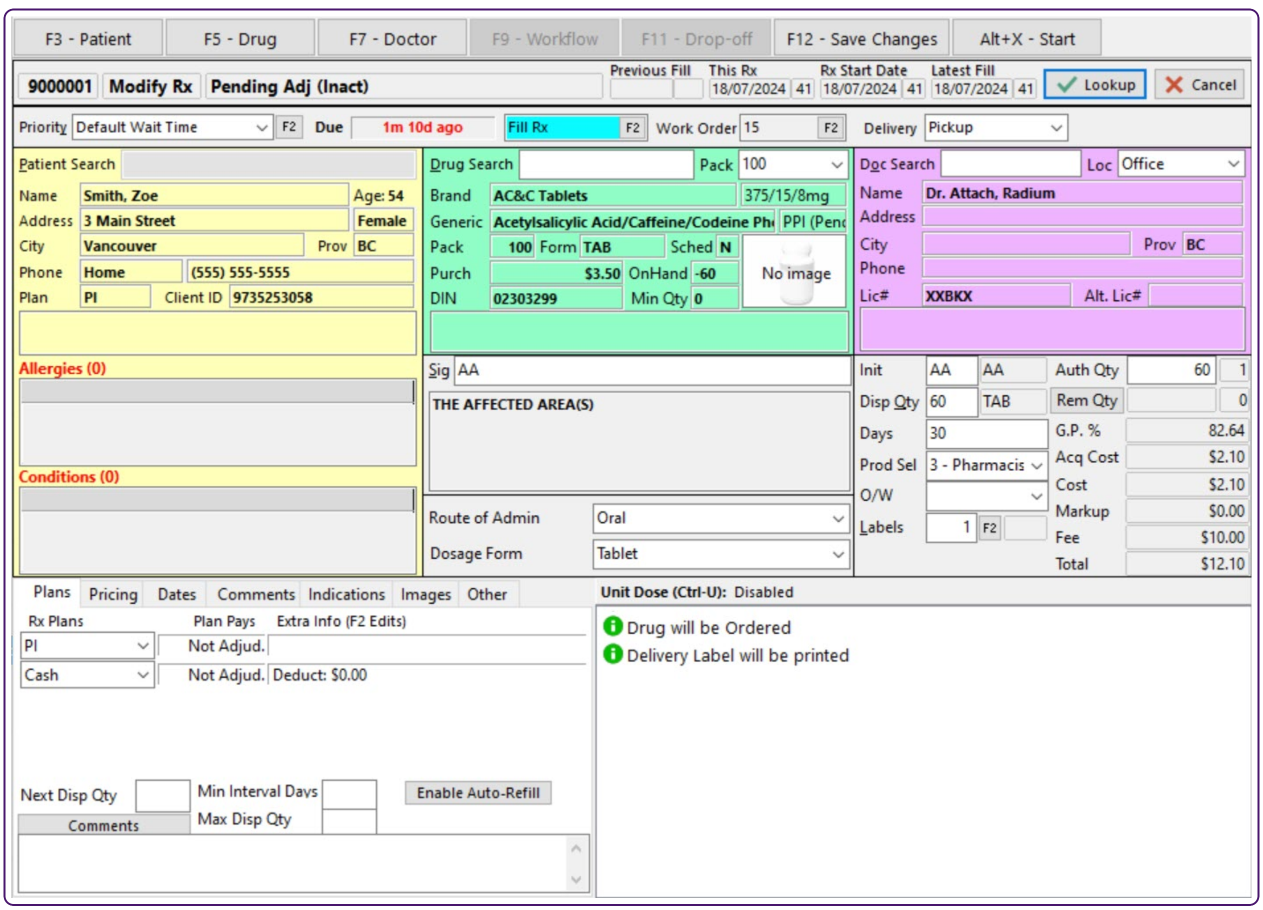
Chapter 13

F12 - Fill Rx window

The **F12 - Fill Rx** window contains all the Rx information that is entered during the prescription filling process.

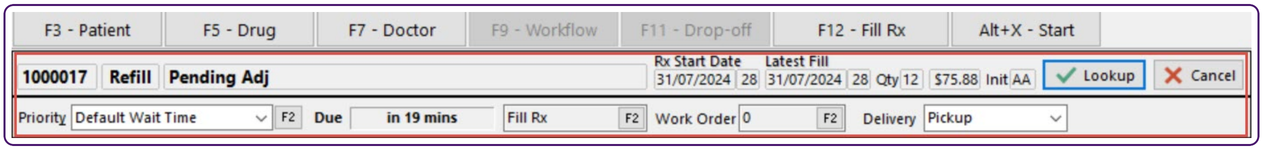
Main window

The F12 window displays all the main elements of a prescription, including the name of the individual who filled the prescription and any legacy details about the prescription.



Information bar

The information bar is located along the top of the F12 window, directly below the function keys. Below is a description of each field in the information bar.



The following table describes these fields and buttons. The date fields vary according to the status of the prescription and the number of times it has been filled.

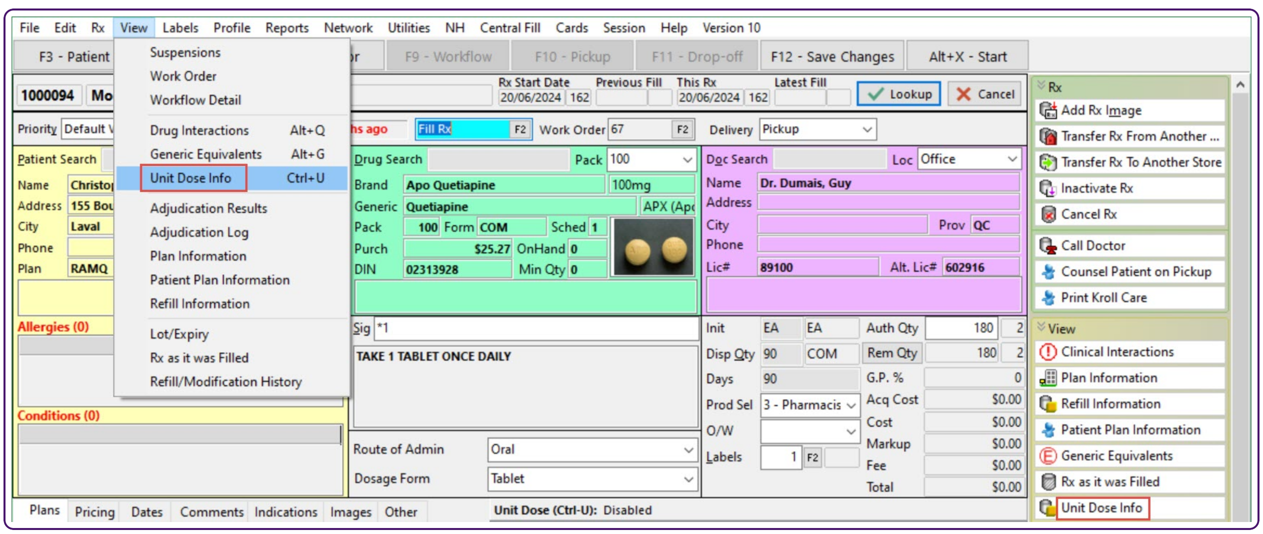
Name	Description
Last Rx Number	The last Rx number used to fill the Rx.
Rx Label	The mode of the Rx.
Pending Adjudication	If present, the Rx is pending adjudication, because the adjudication step has not been completed. The field is blank once adjudication is complete.
Rx Start Date	The Rx's previous fill date.
Number of days since first fill	The number of days that have elapsed since the start date.
Latest Fill	The fill date of the current prescription.
Number of days since latest fill	The number of days that have elapsed since the latest fill.
Qty	The quantity that was dispensed since the last time the Rx was filled.
Latest total	The amount that was charged the last time the Rx was filled.
Init	The initials of the user who last filled the Rx.
Priority	Indicates if the Rx has a due time (pick up time). Select an option from the menu to specify a priority, or select **F2** to replace this field with Date and Time fields and then enter a specific due time. Priorities are configured from the store-level **Configuration Parameters** window.
Due	The time remaining before the Rx is due.
Workflow Detail	The workflow type.

Name	Description
F2 button next to Workflow Detail	Displays the **Rx Workflow Detail for Rx** window. This window contains three tabs: ▪ The **Workflow** tab displays all of the workflow actions that are connected to the prescription, along with the status of each action, the date of completion, the initials of the user who completed the action, and any comments that were entered. ▪ The **Packaging** tab displays information about the drug that was filled in the prescription, such owed quantities, quantities packaged, tote number, and delivery status. ▪ The **Comments** tab displays comments that pertain to the workflow action or steps.
Work Order	Rxs with the same work order number are presented together as one work order when completing the pickup process.
F2 button next to Work Order	Select to add this prescription to an existing or new work order or view the other prescriptions that belong to the same work order.
Delivery	The selected delivery route.
Lookup	Used to refresh the F12 window after information has been entered or changed. For example, if the plan has changed on the prescription, you can press Enter or click Lookup to refresh your changes.
Cancel	Displays the window you accessed before the F12 filling window.

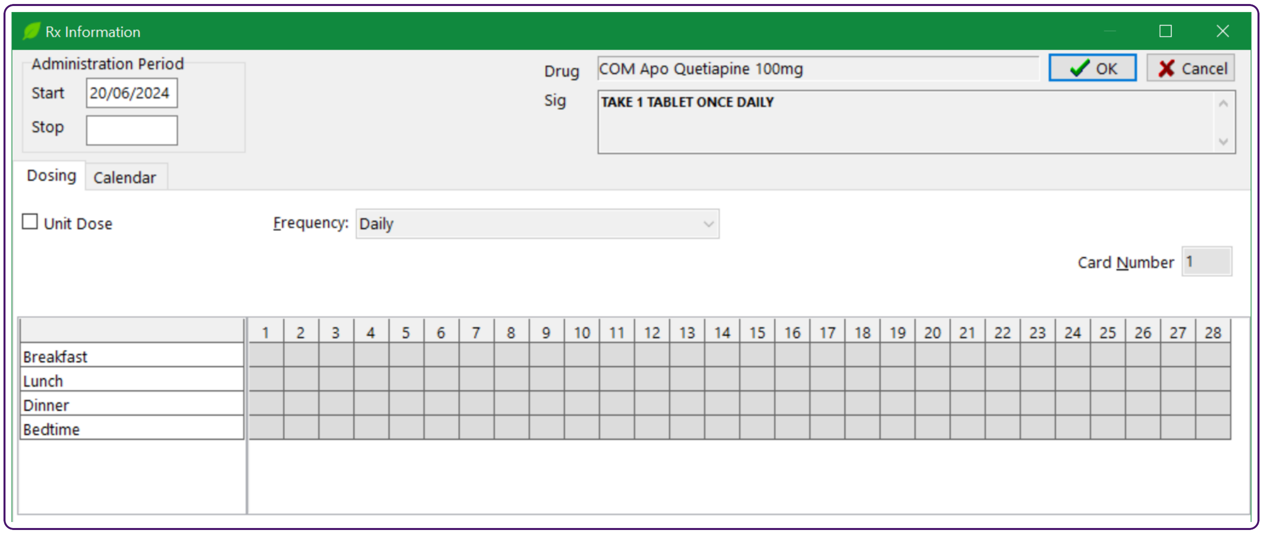
Unit Dose

The **Unit Dose** section is used to identify Rxs that should be taken at a certain time. Kroll supports unit dose packaging types including DisPill, PillPak, Dosettes, and a number of generic compliance reports.

To enable unit dose for an Rx, from the F12 page, select **View** > **Unit Dose Info**, or select **Unit Dose Info** from the right navigation pane.



The **Rx Information** window is displayed.



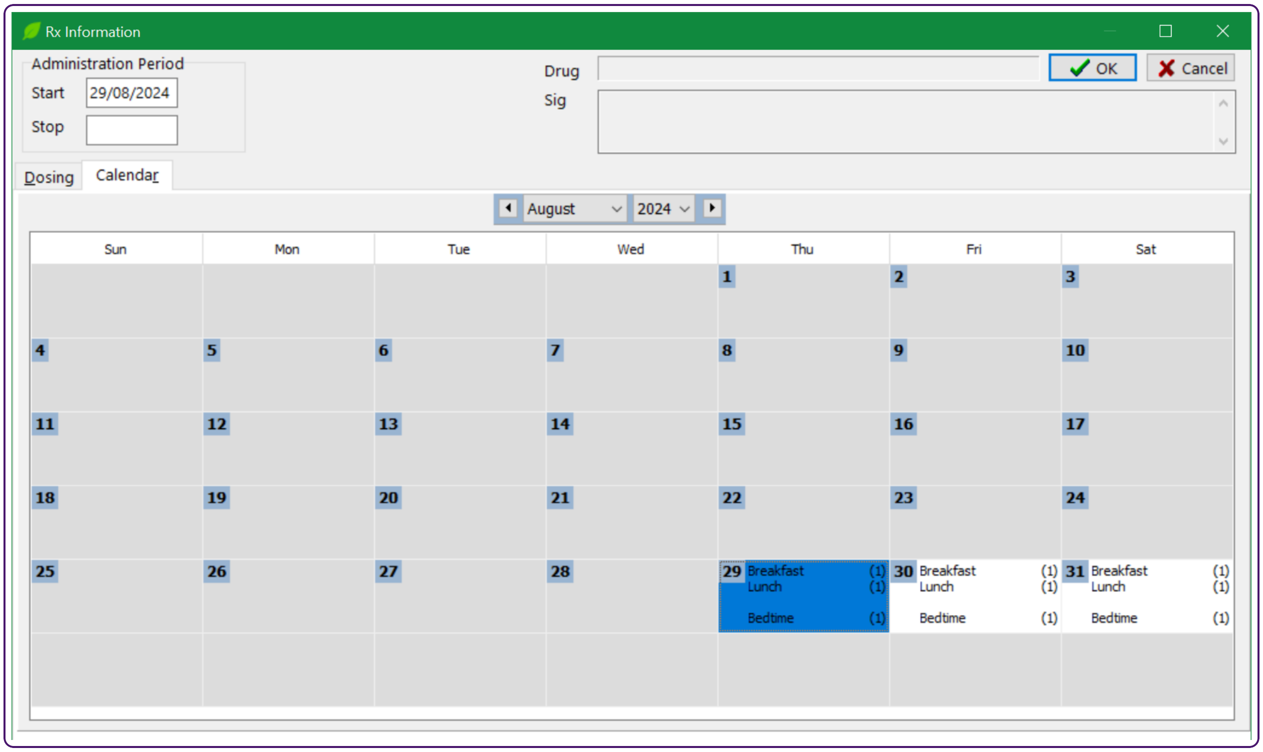
The following table describes the fields in the top panel of this window.

Name	Description
Start	The first date the medication will be populated on the Unit dose packaging reports. This is the **Start** date from the **Dates** tab in the lower left hand corner of the F12 window. If you change this date, the **Start** date on the **Dates** tab is updated.
Stop	The last date the medication will be populated on the Unit dose packaging reports. This is the **Stop** date from the **Dates** tab in the lower left hand corner of the F12 window. If you change this date, the **Stop** date on the **Dates** tab is updated.
Drug	The selected drug.
Sig	The Sig that was entered for the Rx.

The following table describes the fields on the Dosing tab.

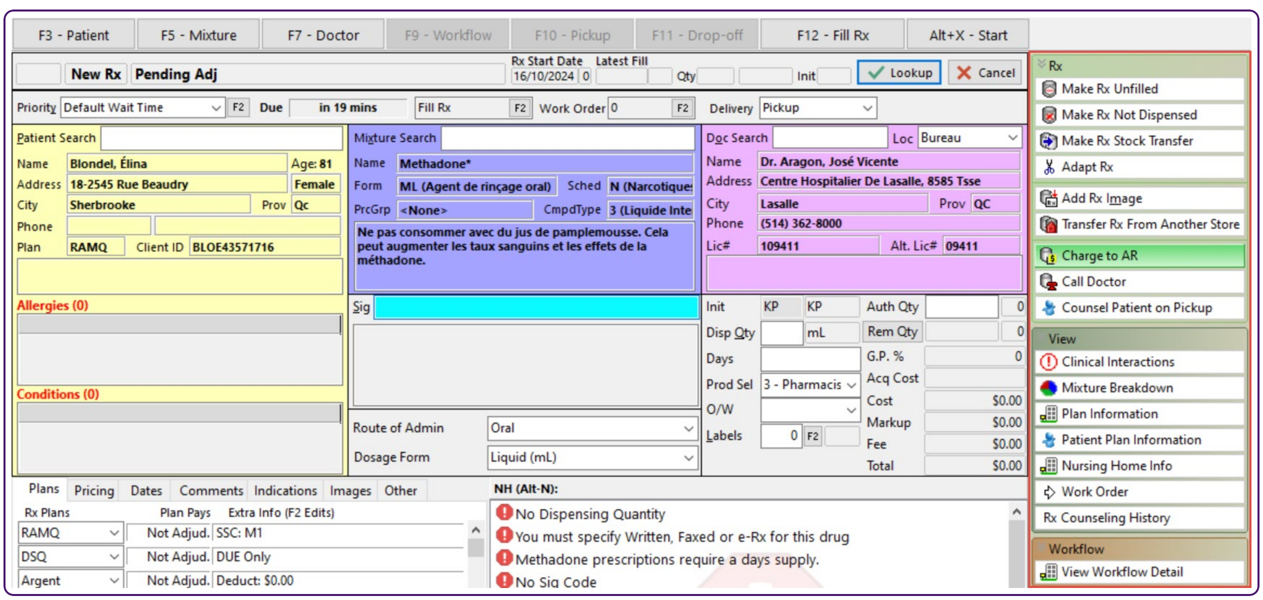
Name	Description
Unit Dose	If selected, unit dosing is enabled for the Rx, and the other fields on this tab are enabled.
Frequency	The dosing frequency.
Card Number	The card number used to group Rxs by unit dose packaging type. The default value is 1.
Quantity	Each box on the grid represents a quantity (dosage) for either Breakfast, Lunch, Dinner, and Bedtime.

The **Calendar** tab displays a monthly schedule of unit dose times and quantities, based on the selected frequency and quantity.



Navigation pane

The navigation pane located on the right side of the F12 filling window contains a variety of functions that pertain to the Rx.



The options in the Rx and View sections are also available from the menu, under **Rx** or **View**. For information on these options, see "Rx" (page 173) and "View" (page 175), respectively.

Menu

The following sections describe the options under the **Rx**, **View**, **Labels**, **Profile**, and **Reports** menu headings.

Rx

The following table describes the options that may be available from the **Rx** heading, depending on which window is displayed when you select this heading, and the status of the Rx.

Name	Description
Adapt Rx	Select to adapt the selected Rx.
Add Rx Image	Select to display the **Rx Image** window, which you can use to import a script image or select an existing image to add to the Rx.
Allow more than 2 ODB fees per month (Ontario Only)	Select to send a fee for all Rxs after the second fill for fee exception drugs.
Back Date Rx	Select to change the fill date of an Rx before it is processed.
Call Doctor	Select to create a callback record to remind pharmacy users to contact the prescriber regarding the Rx (for Sig confirmation, refill requests, etc.) A 'Call Doctor is Enabled' message will appear in the **Warnings** section of the **F12** window.
Central Fill	Select to send the Rx to Central Fill, where it is dispensed, packaged, and shipped back to the store, directly to the patient, or to a nursing home.
Change Rx Pack Size Qty	Select to display the **Change Rx Pack Sizes** form where you can change or divide the Rx quantity among pack sizes. This option is only available if more than one active pack size is available.
Charge to Account	Select to charge the prescription to the patient's pre-pay account, via a new (open) invoice.
Charge to AR	Select to charge the remaining cash amount to the patient's AR account. This option is only available if the Accounts Receivable module is activated and the patient has an AR account.
Counsel Patient on Pickup	Select to arrange for patient counseling at pickup. A form appears which you can use to select a reason for conducting the counseling session.
Copy to New Rx	Select to inactivate the current Rx chain and start a new Rx using the same information.
Elston (Ontario Only)	Select to enable Elston Pricing for the Rx. This charges the full purchase cost with no markup.
Inactivate Rx	Select to discontinue an Rx.
Interventions/SA Numbers	See the **Rx Plan Information** option on the "Navigation pane" (page 172).

Name	Description
Make Rx Not Dispensed	Select to mark an over-the-counter item as not dispensed, so it can be logged on the patient profile without passing through the different filling stages and generating labels and receipts.
Make Rx Refusal to Fill	Select to mark the Rx as Refusal to Fill.
Make Rx Stock Transfer	Select to mark the Rx as a stock transfer to another pharmacy.
Make Rx Unfilled	Select to mark an Rx as unfilled (on hold).
Make this doctor that family doctor for this patient	Select to make the selected doctor the family doctor for the patient.
Methadone Carries	Select to make the Rx a methadone carry.
Change Next Fill Parameters	Select to display the **Change Next Fill Parameters** form. The next time the Rx is called up in fill mode, the changes entered in this form are applied.
Order Drug	Select to display the **Place Order** form, which you can use to select a vendor and the quantity to order. This will place the selected drug in a manual order.
Owe Quantity	Select to display the **Edit Rx Owe** window, which you can use to select the drug quantity you will owe the patient on a return pickup. An owing amount is printed on the label.
Part Fill	Select if the entire authorized quantity has not been dispensed. A part fill label will be generated.
Pickup Notification (Request)	Select to identify who will receive the pickup notification request.
Print Authorization Label Now	Select to print an Authorization Label. The pharmacist will call the doctor and record information about the Rx on a hardcopy label for easy attachment to the original hardcopy phone refill.
Print Compliance Calendar	Select to print a compliance calendar on the label set, beginning at the start date and continuing for the duration of the prescription, as indicated in the days supply field. The pharmacist can circle the days the patient needs to take the dose or write in the quantity of pills to take. This is typically used for complicated Rxs or tapering doses.
Print Delivery Label (Send To)	Select to print a delivery label if your system is not configured to do so for every label.
Print Kroll Care Now	Select to print the drug information monograph. The content of Kroll Care is provided by the First Data Bank (FDB) clinical drug module.
Print Wallet Card (Profile)	Select to print a wallet card or patient profile if one is not configured to print on every label set.
Reactivate Rx	Select to reactivate the Rx.
Transfer Rx from Other Store	If a prescription is being transferred from another pharmacy, select this option to input information about the transferring pharmacy.

Name	Description
Transfer Rx to Another Store	f a prescription is being transferred to another pharmacy, select this option to input information about the pharmacy that is receiving the prescription.
Trial Rx	Select to display the **Trial Rx Information** window where you can specify the trail amount that will be dispensed for the first fill.
View Transfer to Another Store	Select to display information about an Rx's transfer to another store.
Workflow Comment	Select to add a workflow comment.

View

The following table describes the options that may be available from the **View** heading, depending on which window is displayed when you select this heading, and the status of the Rx.

Name	Description
Adjudication Log	Select to display the adjudication log.
Adjudication Results	Select to display the **Adjudication Results** window, which you can use to view how the Rx was last adjudicated.
Cancel Rx	Select this option to reverse an Rx.
Clinical Interactions	Select to perform a clinical review of the prescription against the rest of the patient medication history, from the FDB database.
Comments from previous fill/cancel	Select to display the **Comments from previous fill/cancel** window, which you can use to view the last Rx fill/cancel comment.
Drug Interactions	See **Clinical Interactions** on the "Navigation pane" (page 172).
Generic Equivalents	Select to view the generic equivalents for the selected drug. At the Input stage, you can highlight a generic equivalent and click **Select** to select an alternate drug record for the Rx.
Mixture Breakdown	Select to display the **Mixture Breakdown** window, which provides exact dollar amounts for elements that make up the mixture pricing. It is recommended that you do this before you adjudicate the Rx.
Patient Plan Information	Select to display the **Patient Plan Information** window, which displays the patient’s third party plan information. If more than one plan applies to the Rx, one tab is displayed across the top of the window for each drug plan. Adjust the third party plan information and re-adjudicate the Rx, if necessary.

Name	Description
Plan Information	Select to display the **Rx Plan Information** window, which you can use to enter plan-specific information. If more than one plan applies to the Rx, one tab is displayed across the top of the window for each drug plan. The following bullets describe some of the fields on this window: ▪ The **Special Authorization #** field identifies the number associated with the special authority that grants full benefit status to a medication that would otherwise be a partial benefit or a limited coverage drug. ▪ The **Special Services Code** field is often used to bill service fees to Indigenous Services Canada (ISC). ▪ The value of the **Claim Type** field is configured according to the parameters of the prescription. It should not be changed. ▪ Do not change the value of the **Real Time Plan** check box as it is set according to the third party plans present in the prescription. If it is deactivated, you will need to manually bill for prescriptions that could have been billed electronically in real time. ▪ The **Pseudo DIN** field displays the pseudo DIN being sent to the third party for the prescription, but you can also override this value to send a onetime pseudo DIN with the prescription.
Refill Information	Select to display the refill history for the Rx.
Refill/Modification History	Select to display the **History of original Rx Number** window, which you can use to view all changes made to the Rx since its original fill.
Rx as it was Filled	Select to display the F12 window for the first fill of the Rx.
Rx Counseling History	Select to display the **Counseling History** window, which shows records of all past counseling sessions associated with the Rx.
Suspensions	Select to display the **Suspensions for Rx** window, from which you can view past suspensions that apply to the Rx or insert a new suspension.
Unit dose Info	Select to view the **Unit Dose Rx Information** window for the Rx. For more information, see "Unit Dose" (page 170).
Work Order	Select to display the work order number. Rxs filled with the same work order number are intended to be picked up together using the pickup application.
Workflow Detail	See "View workflow details" (page 86).

Labels

The following table describes the options that are available from the **Labels** heading. These options pertain to the Rx label that is generated when filling the Rx.

Name	Description
Generic	Select to override the first drug name.
Second Drug Name	Select to override the current second drug name.

Name	Description
Half Size Sig	If enabled, the Sig prints at half its usual size. This is useful for drug products with long Sig instructions.
Preview Label Printing Action	Select to preview the label set or Kroll Care.
Message	Select a message to be printed on the label. Rx messages are configured via **Utilities** > **Labels** > **User Labels**.
Profile Lines to Skip	Select to choose the number of profile lines to skip when printing the profile/wallet card labels for this Rx.

Profile

You can use the options under the **Profile** heading to view the patient profiles from the F12 window.

Name	For information, see...
All Rxs	"All Rxs" (page 71)
Active Rxs	"Active Rxs" (page 71)
Refillable Rxs	"Refillable" (page 72)
Pricing Profile	"Pricing Profile" (page 72)
Not Disp/OTC Profile	"Not Dispensed/OTC Rxs" (page 72)
Rxs Filled in Error	"Rxs Filled in Error" (page 73)
Active Rxs and Passtimes	"Active Rxs with Passtimes" (page 71)
Suspended Rxs	"Suspended Rxs" (page 73)
Transactions	"Transactions" (page 73)
Perform Clinical Analysis	"Perform Clinical Analysis" (page 74)
Therapeutic Equivalents	"Display Therapeutic Equivalents" (page 90)

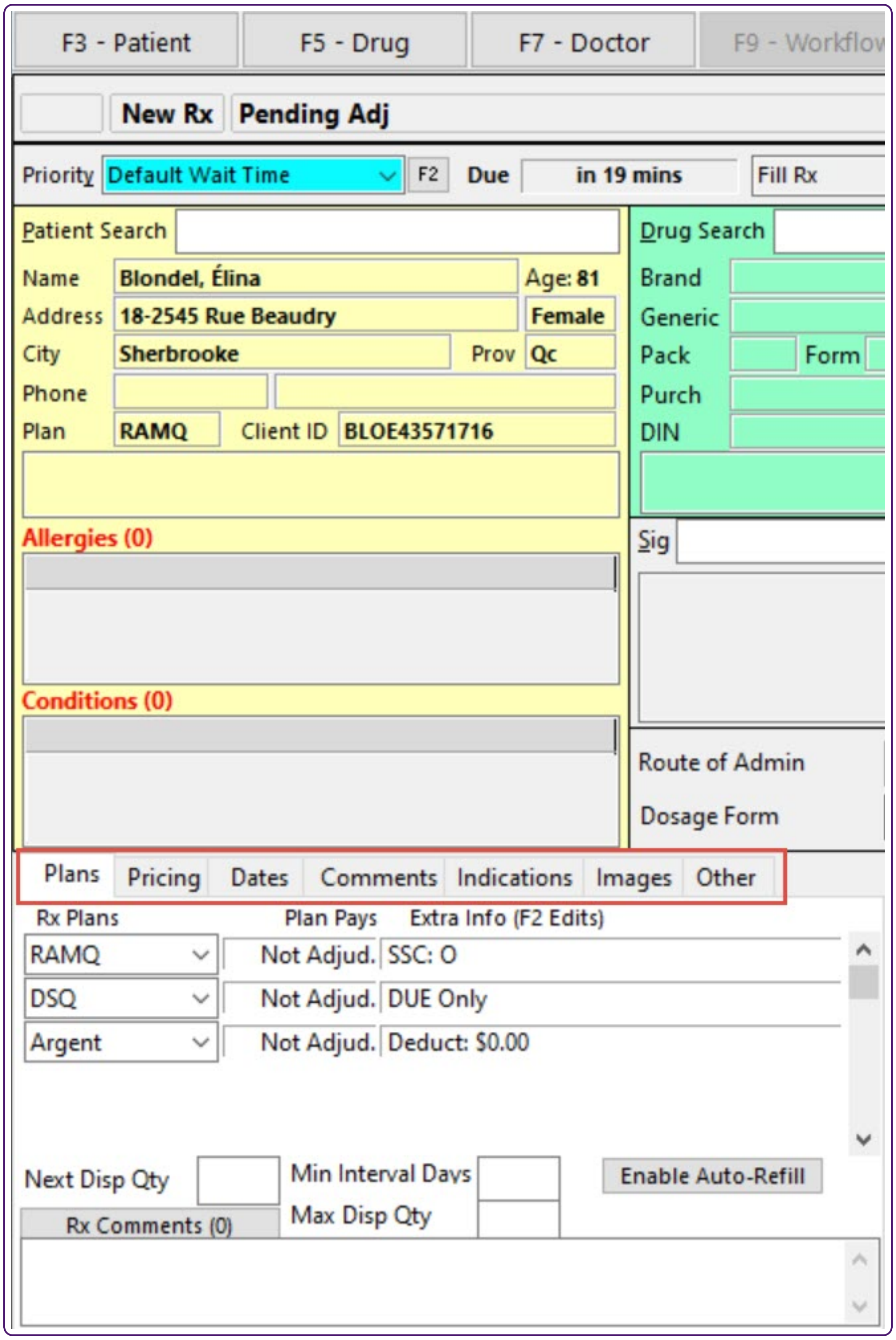
Reports

The following table describes the options that are available from the **Reports** heading.

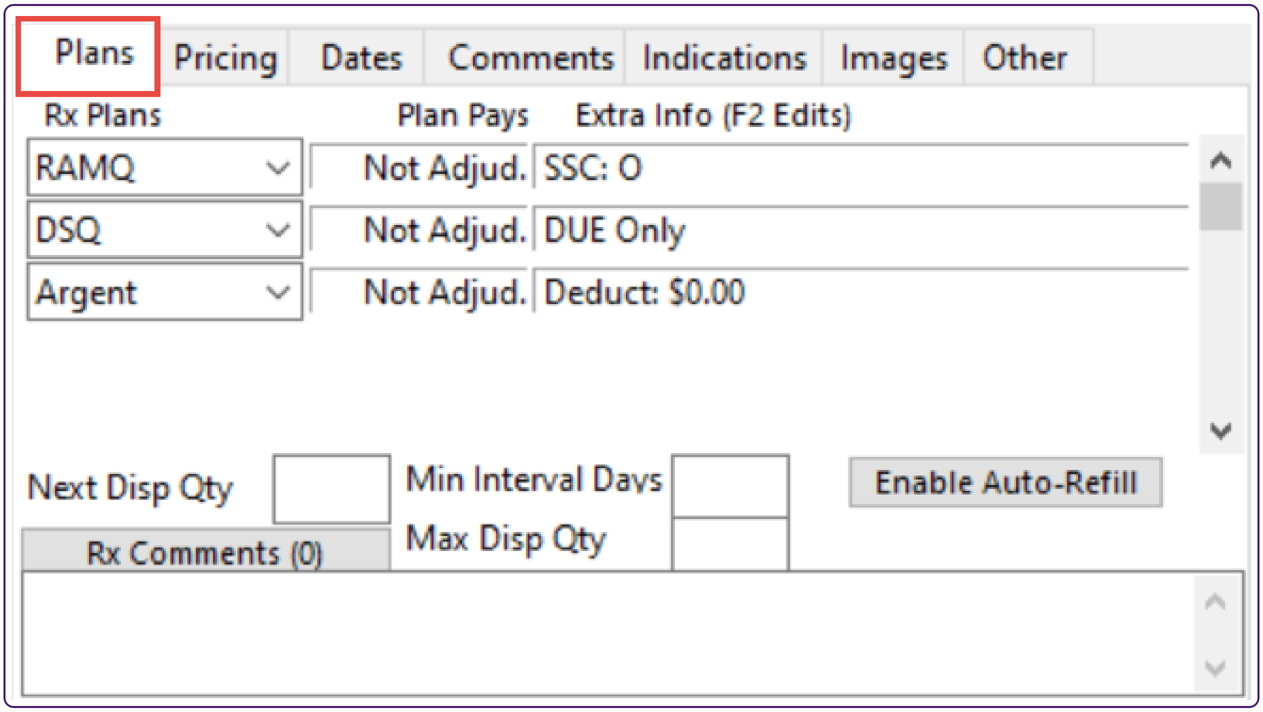
Name	Description
Individual report names	Select the name of a report to display it.
All	Select to display all Kroll reports (not just F12 specific reports).
Search	Select to search for a specific report.

Tabs

The tabs provide additional information about the Rx being processed. Use the left and right arrow keys to navigate through the tabs.



Plans

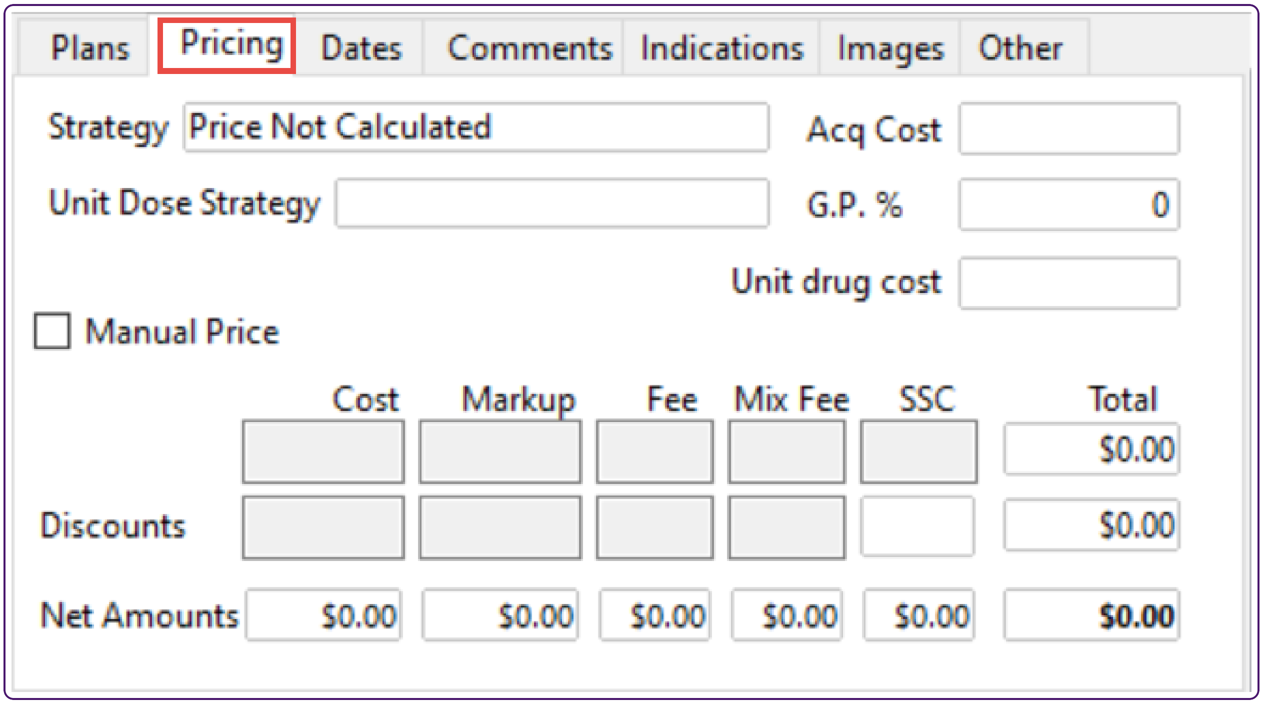


The following table describes the fields on this tab.

Name	Description
Rx Plans	Select to exclude third party plans from a prescription, or change the order of billing. The plans are listed in order of billing.
Plan Pays	Displays how much each plan has paid for the current Rx.
Extra Info	Displays intervention codes or other options (populated from the **Rx Plan Information** window) for each plan for the current Rx.
Next Disp Qty	The new dispense quantity for the next refill. This is especially useful for trial prescriptions where the first order has a lower dispensing quantity than the next.
Min Interval Days	Used for narcotic prescriptions to prevent refilling until a specified number of days have elapsed.
Enable Auto Refill	Select to enable auto-refill on Rxs. When the days supply of the Rx has elapsed, the Rx is displayed in the To Do queue for processing.
Max Disp Qty	The maximum quantity of drug that can be dispensed.
Rx Comment	Displays the number of comments added to the Rx. Select the button to display the comments tab. Enter comments in the text box.

Pricing

The pricing tab displays information regarding the pricing strategy used to calculate the Rx. pricing strategies are set in **Edit** > **Plans/Pricing**.

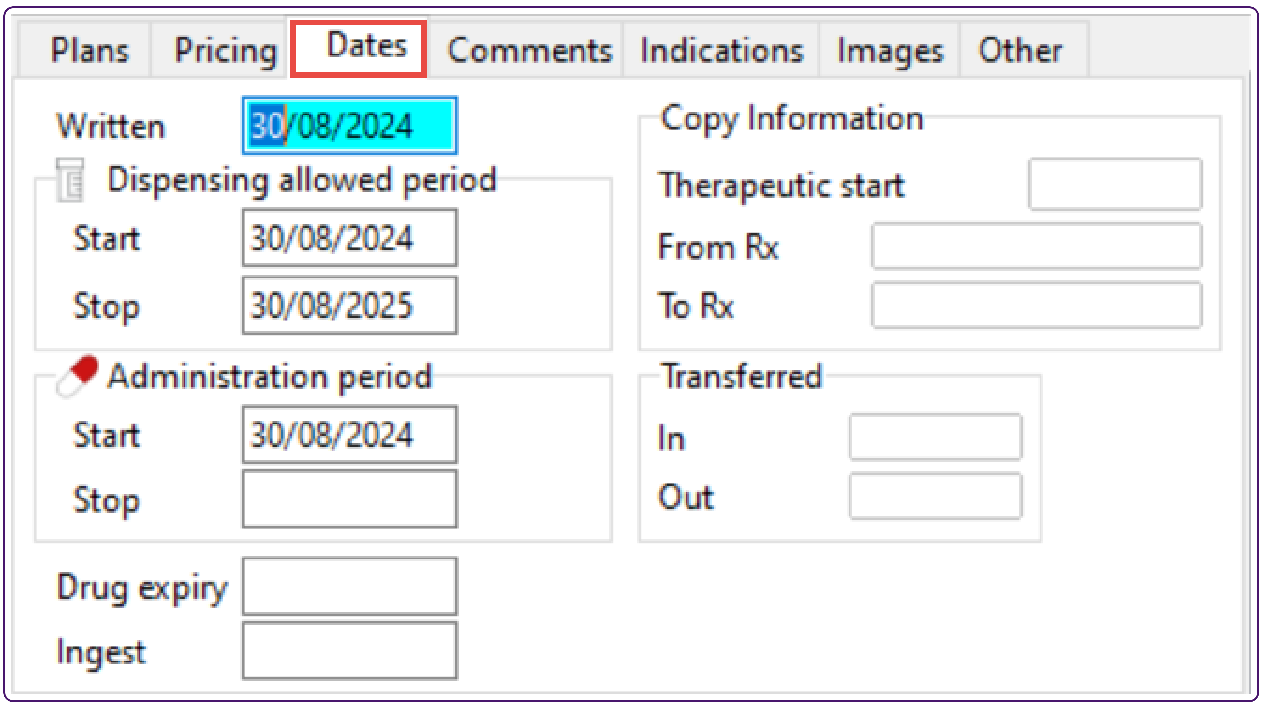


The following table describes the fields on this tab.

Name	Description
Strategy	The read-only name of the pricing strategy being used in the Rx that is set up in **Edit** > **Plans/Pricin**g.
Unit Dose Strategy	The read-only name of the unit dose pricing strategy being used in the Rx and that is set up in **Edit** > **Plans/Pricing**.
Acq Cost	A read-only calculation based on the purchase price of the drug card.
G.P.	The read-only gross profit percentage is calculated using: (Rx Total $$$ - ACC)/RX total $$$)
Unit drug cost	The read-only cost per pill. This is based on the following calculation: Drug pack size/Purchase Cost of the drug card.
Manual Price	Select this check box to override the pricing. The Cost, Markup, Fee, Mix Fee and SSC fields will be enabled. Manual pricing should only be used in emergency situations; incorrectly priced prescriptions should be reported to the TELUS Health for investigation of the root cause.
Pricing row	The individual pricing breakdown for the Rx.
Cost	The read-only dollar amount calculated by the system as set up in the pricing strategies specific to cost.

Name	Description
Markup	The read-only dollar amount calculated by the system as set up in the pricing strategies specific to markup.
Fee	The read-only dollar amount calculated by the system as set up in the pricing strategies specific to fee.
Mix Fee	The read-only dollar amount calculated by the system as set up in the pricing strategies and/or the mixture card specific to the fee.
SSC	The Special Services Code fee.
Total	The read-only dollar amount calculated by the system as set up in the pricing strategies specific to the sum of all the fields.
Discounts	The discounts that have been applied to each price field for waiving cost differences during adjudication.
Net Amounts	The net amount (original pricing – discount) applied to each price field.

Dates



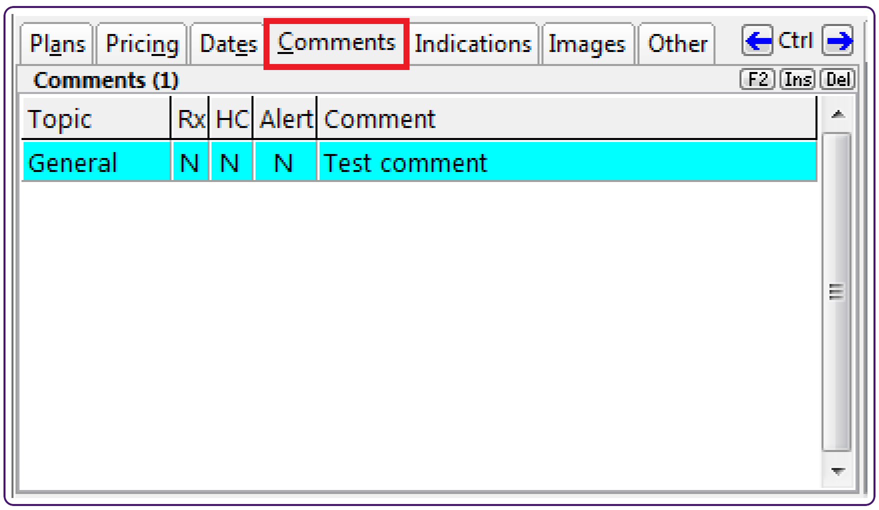
The following table describes the fields on the Dates tab.

Name	Description
Written	The date the Rx was processed. You can change it to the date the prescription was written.
Dispensing allowed period Start and **Stop** dates	The period during which the prescription can be dispensed.

Name	Description
Administration period Start and **Stop** dates	The date the Rx was processed. For New Rxs, you can change this to the date the patient will start taking the medication.
Drug expiry	A drug expiry date for the prescription, if applicable. This date is printed on the vial label for the patient's information. This option is especially useful for liquid antibiotics.
Ingest	The ingest date for methadone prescriptions.
Copy Information	The read-only **Therapeutic start date**, as well as the Rx numbers of the original Rx and its copy.
Transferred In and **Out** dates	The read-only dates a prescription was transferred in and out.

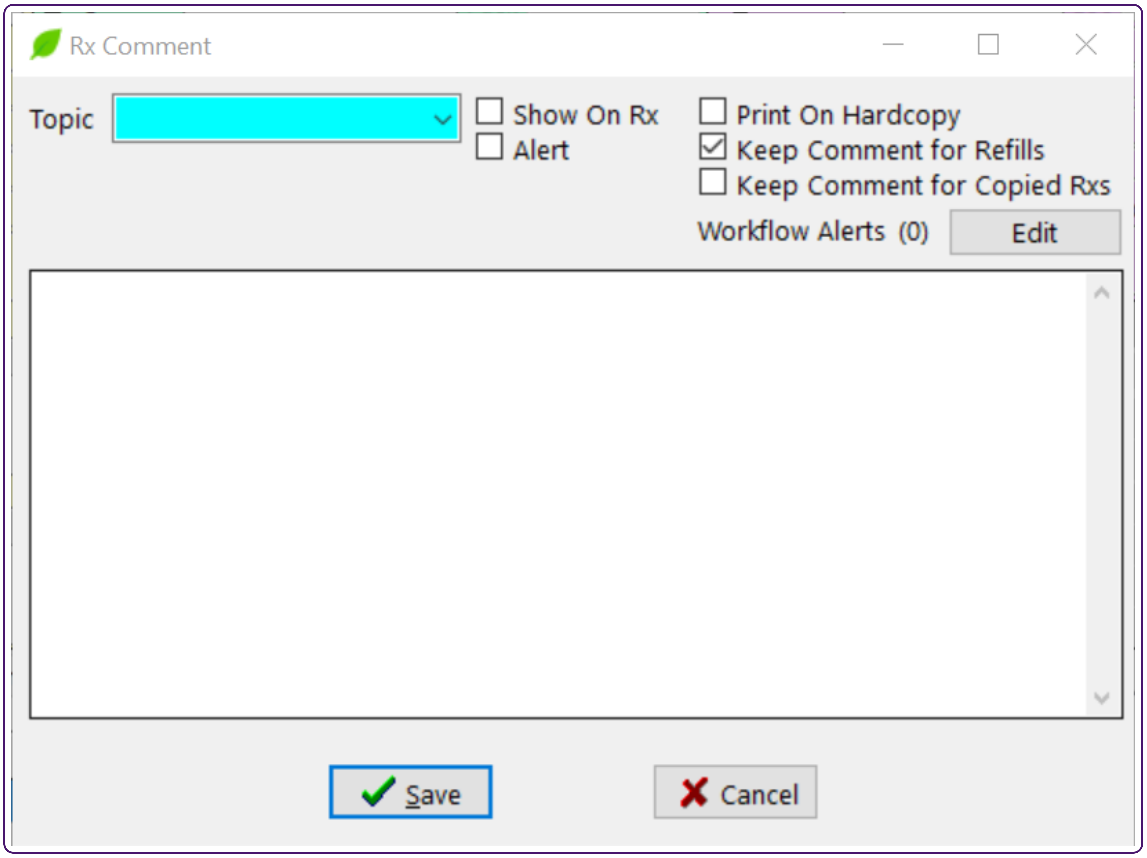
Comments

You can add comments and notes from the **Plans** and **Comments** tabs. From the **Comments** tab, you can select additional attributes that are not available on the **Plans** tab.



1. To insert a new comment, select **Ins** or press Insert, then select **Comment**.

   The **RX Comment** pop-up is displayed.



2. Select a **Topic** and enter your comment.
3. To show the comment when filling a prescription, select **Show On Rx**.
4. To show a pop-up message during filling that indicates a comment is present, select **Alert**.
5. To include the comment on the hard copy prints during filling, select **Print On Hardcopy**

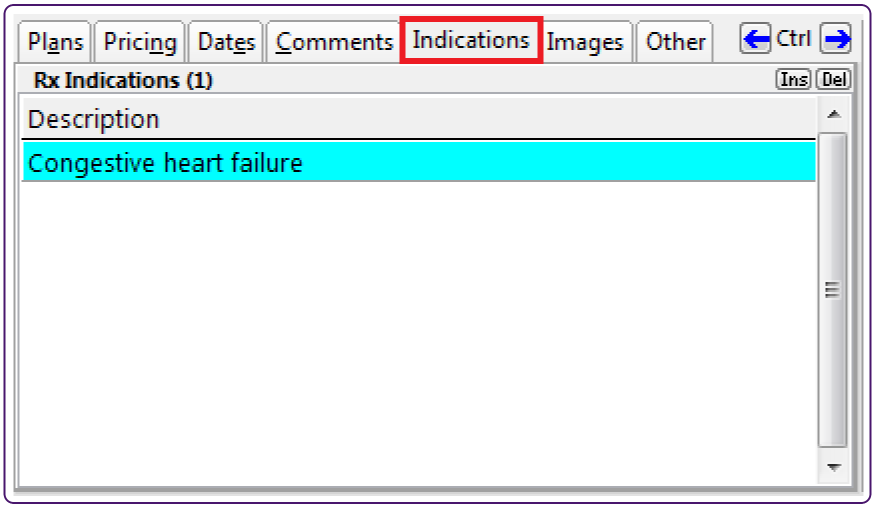
   This checkbox can only be selected for one comment, as there is limited space on the hardcopy.
6. To include the comment on any refills for this prescription, select **Keep Comment for Refills**.
7. To copy the comment to a new prescription, if the original prescription is copied, select **Keep Comment for Copied Rxs**.
8. To display a comment during one or more steps in the workflow, select the **Edit** button adjacent to **Workflow Alerts**, then select one or more workflow steps and select **OK**.
9. To choose which workflow the comment is applied to, select **Edit**, the select the applicable workflow.

> If you select more than one workflow, it will only be displayed on the first workflow unless you escape out of the Rx and return to it for the next workflow.

10. Select **Save**.

Indications

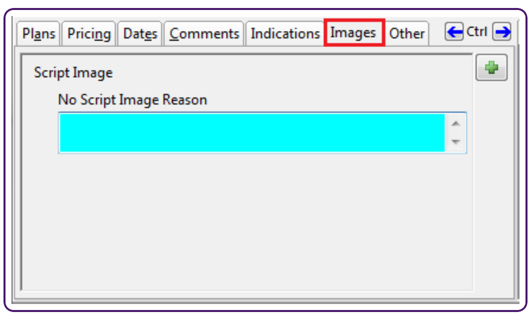
The **Indications** tab allows you to identify what condition(s) the prescription is treating.



Select **Ins** to display a list of ICD-10-CA and/or FDB conditions. Search for the applicable condition, highlight the record, and click **Select**.

Images

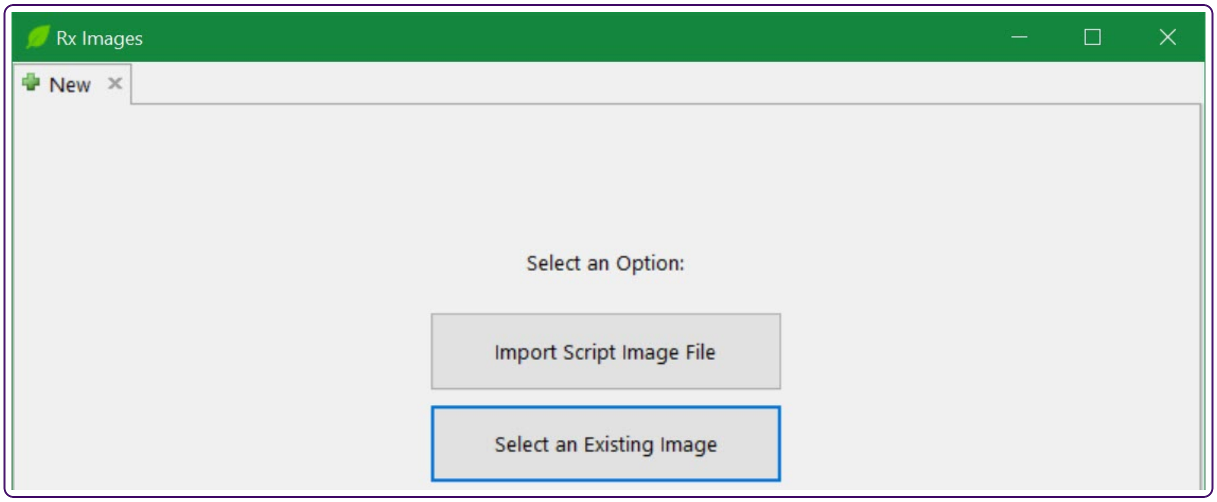
You can use the **Images** tab to import a script image or indicate a reason for not including a script image.



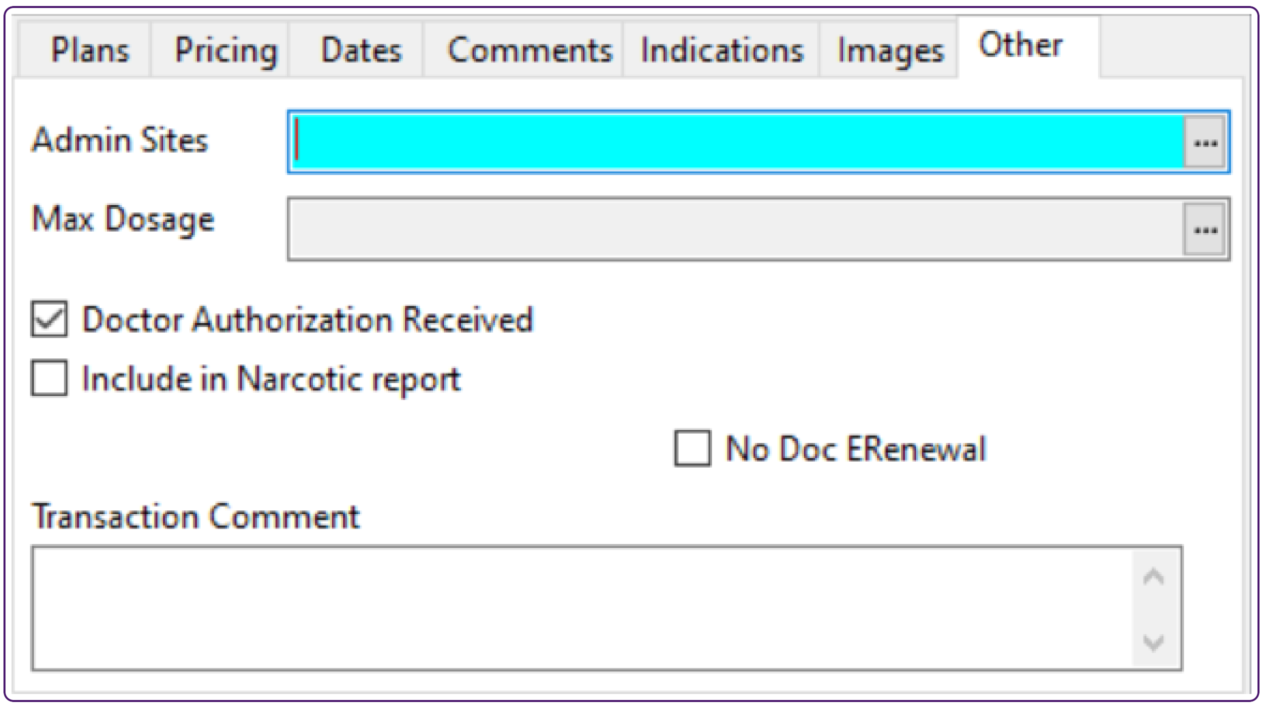
Do one of the following:

- If a work order does not have a written Rx that accompanies it, enter the reason why in the **No Script Image Reason** field, or

- To add an image, select **+** then select the **Import Script Image File** or **Select an Existing Image** and select the image you want to add.



Other



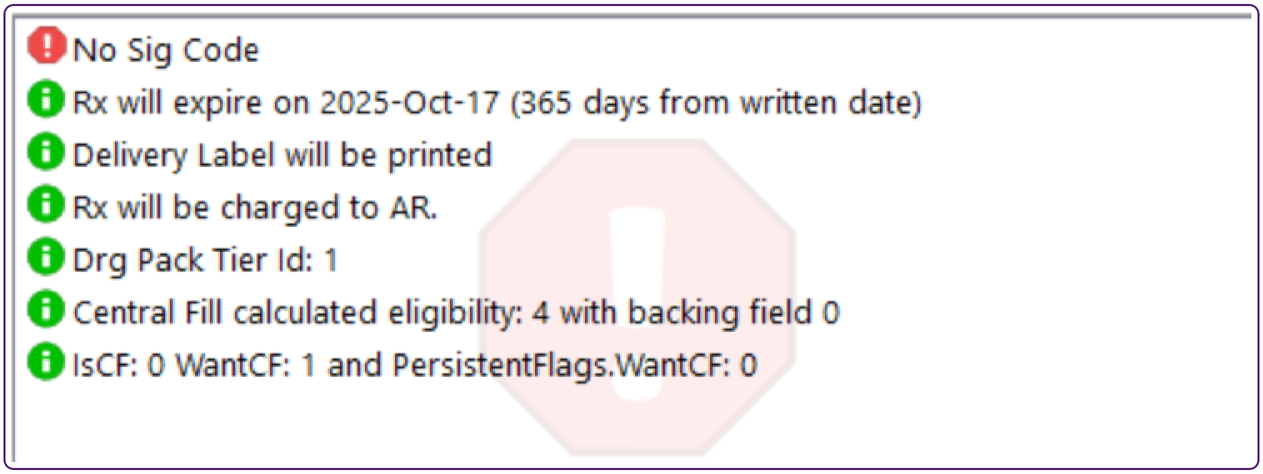
The following table describes the fields on this tab.

Name	Description
Admin Sites	The area on the patient's body that the drug is administered.
Max Dosage	The max dosage of drug that can be administered per time measurement, such as hour or day. You can enter two max dosages.

Name	Description
Doctor Authorization Received	This should always be selected, as it indicates that prescriber authorization to dispense the prescription has been received.
Include in Narcotic report	Select to include the Rx in the narcotic report even if it is not a narcotic prescription.
No Doc ERenewal	If selected, doctor eRenewal is prohibited,
Transaction Comment	Displays any comments specific to the transaction. This can be a user comment, system comment, or a comment transferred from the To Do comment section. This comment will not be transferred to refills or copied Rxs.

Warnings

The **Warnings** section displays important information and problems that pertain to the Rx.



The following table describes the icons shown in this section.

Icon	Type	Description
	Error message	There is a problem with the Rx and you cannot move it to the next filling stage.
	Warning message	There is a potential issue with the Rx, and addressing this issue may prevent input errors. Rxs can be finalized while these messages are present.
	Information message	This is a general message. Rxs can be finalized while a message of this type is present.

Filling a Prescription

This section explains the procedure for filling a prescription from the F12 window.

Patient Details

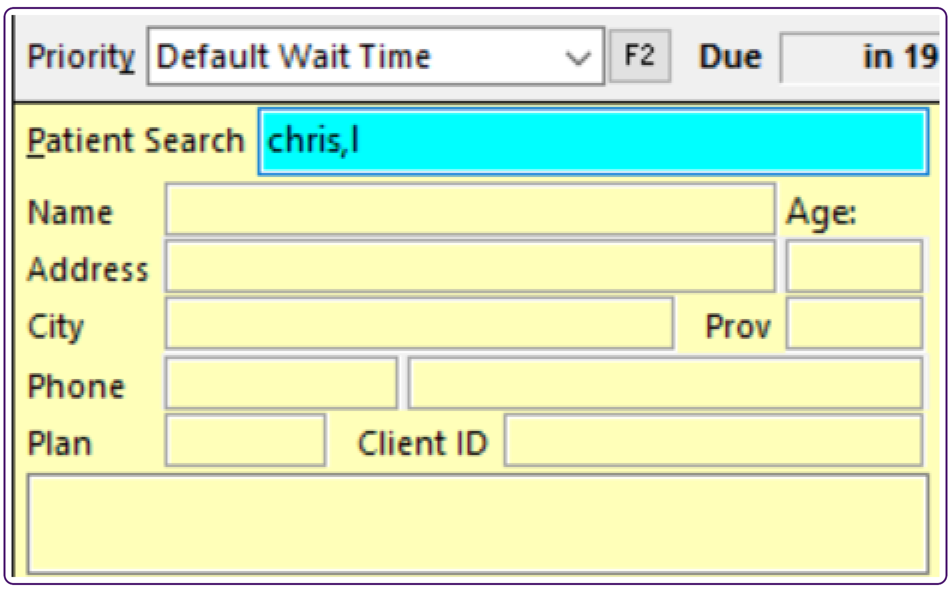
1. Enter one the following search criteria in the **Patient Search** field, then press Enter:
   - Last name, first Name.

     For example, one of the following: “Doe, Jane”, “doe,j”, “Doe”, or “,Jane”
   - A period (.) and the patient quick code.

     For example, ".DoeJ”
   - A 7 or 10-digit phone number.

     For example, "800-263-5876" or "263-5876"
   - A number sign (#) and the third party billing number.

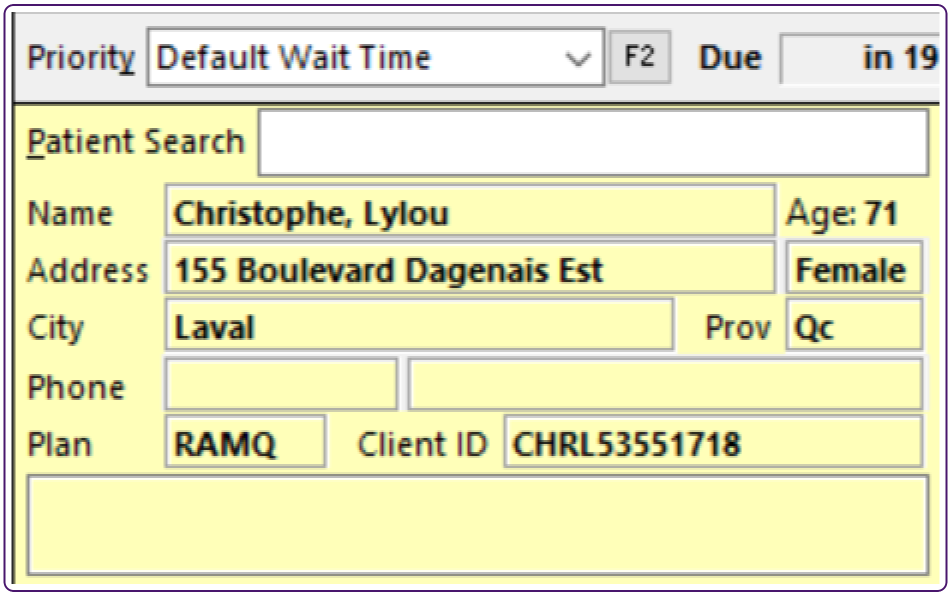
     For example, "#123456789"
   - An asterisk (*) to return all of the patients in the database.

   If more than one patient matches the search criteria, a list of matching patients is displayed; otherwise, the matching patient record is displayed.
2. To select a patient record, do one of the following:
   - Highlight the patient record and press Enter or select **F12 - Return to Rx**.
   - Enter the line number corresponding to the applicable record and press Enter.
   - Double click the patient record.

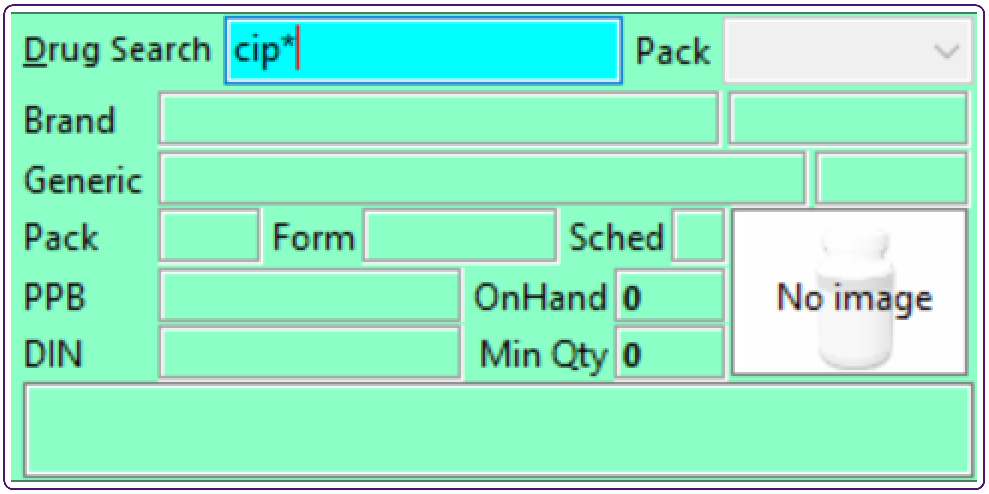
3. Select **Rx**.

   The patient’s information is displayed in the patient fields.



Drug/Mixture Details

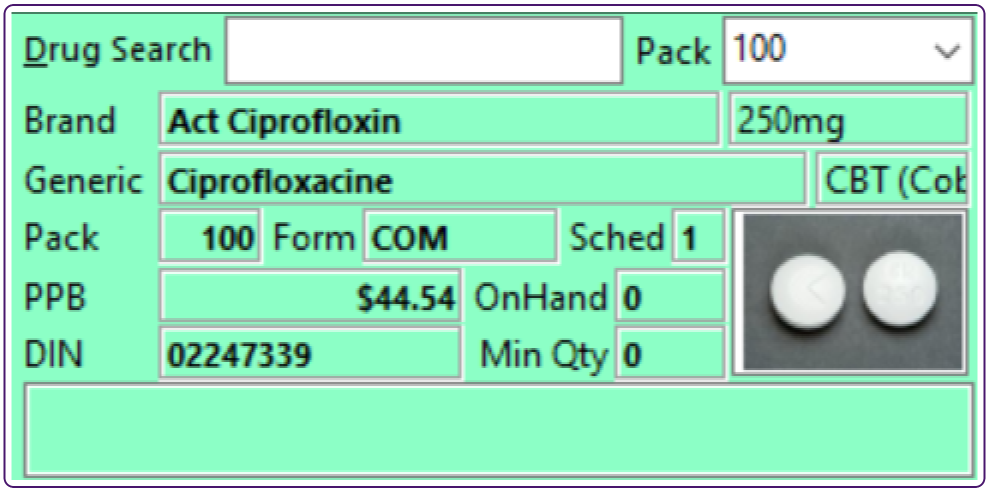
1. Enter one the following search criteria in the **Drug Search** field, then press Enter:
   - Brand/Generic Name, Strength/Pack Size (e.g. Apo-Metformin, 500/360)
   - DIN (5-8 digits)
   - UPC (11-12 digits)
   - A period (.) and the Drug Quick Code (e.g. TYLE3)
   - # symbol and the Catalog Item Number (e.g. #78945)

   A list of matching drugs/mixtures is displayed
2. To select a drug or mixture record, do one of the following:
   - Highlight the drug or mixture record and press Enter or select **F12 - Return to Rx**.
   - Enter the line number corresponding to the applicable record and press Enter.
   - Double click the drug or mixture record.

3. Select **Rx**.

   The drug or mixture information is displayed in the drug fields.



Prescriber Details

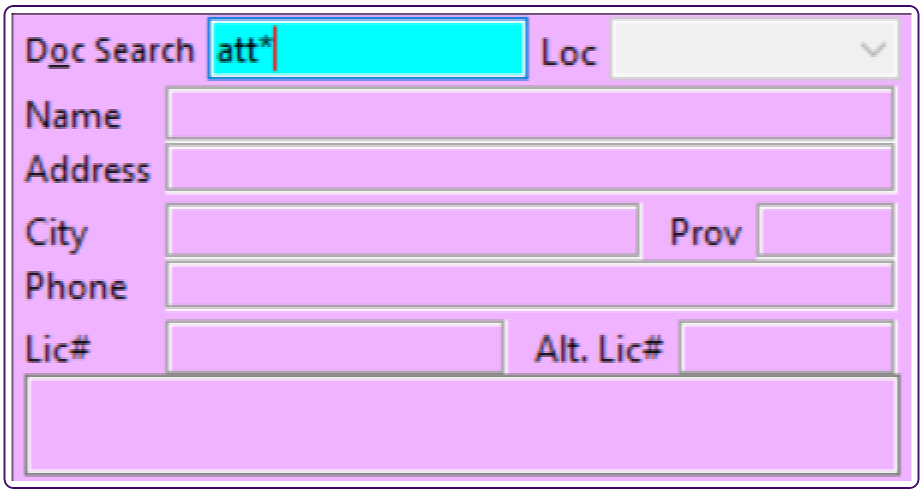
1. Enter one the following search criteria in the **Doc Search** field and press Enter:
   - Last name, first Name.

     For example, one of the following: “Doe, Jane”, “doe,j”, “Doe”, or “,Jane”
   - A period (.) and the patient quick code.

     For example, ".DoeJ”
   - A 7 or 10-digit phone number.

     For example, "800-263-5876" or "263-5876"
   - A number sign (#) and the third party billing number.

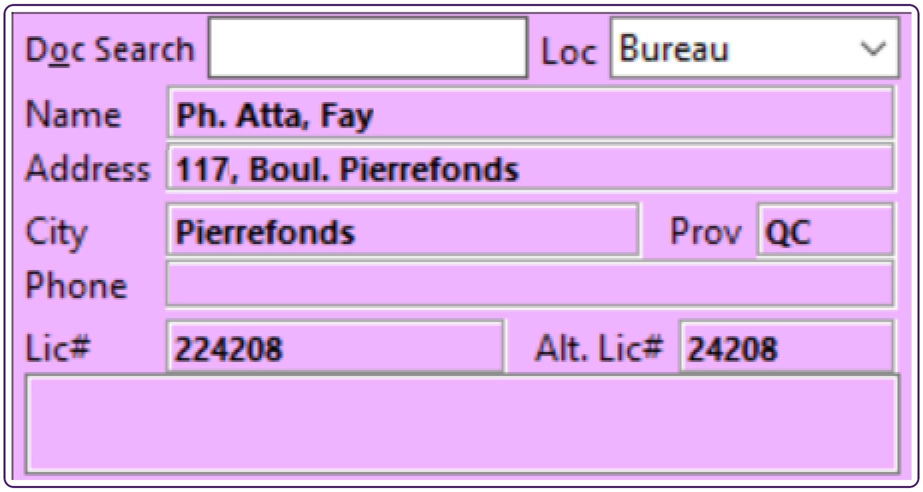
     For example, "#123456789"
   - An asterisk (*) to return all of the patients in the database.

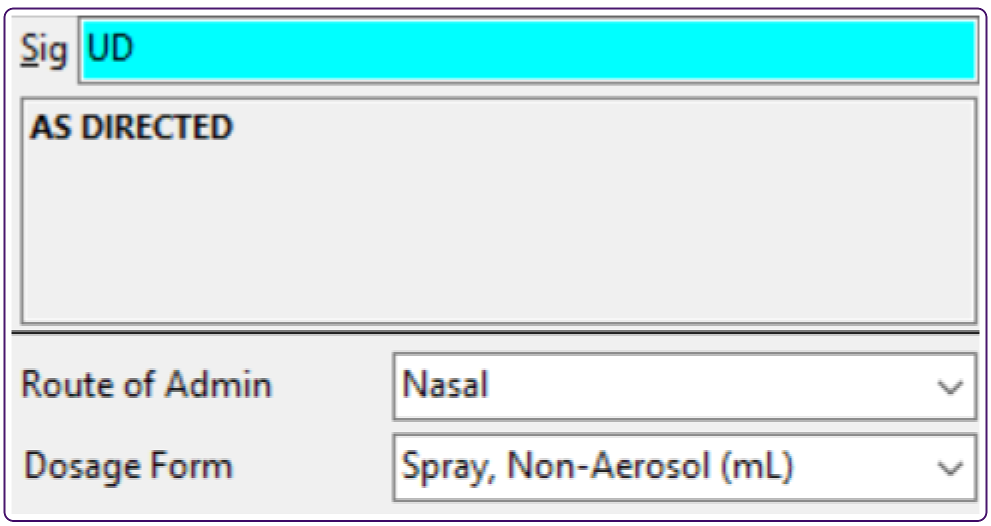
   The list of matching prescribers is displayed.
2. To select a prescriber record, do one of the following:
   - Highlight the prescriber record and press Enter or select **F12 - Return to Rx**.
   - Enter the line number corresponding to the applicable entry and press Enter.
   - Double click the prescriber record.

3. Select **Rx**.

   The prescriber's information is displayed in the prescriber fields.



Sig Details

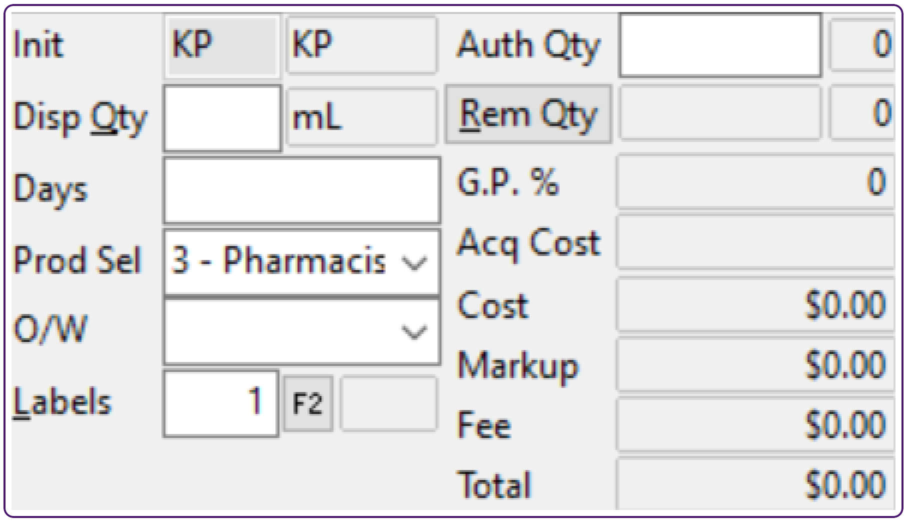


1. In the **Sig** field, enter the code for the appropriate administration instructions.

   A read-only description is displayed below this field.

   You can edit the sig codes and descriptions from **Edit** > **Sig Codes**.
2. Select the **Route of Admin** for the drug product, such as oral or topical.
3. Select the **Dosage Form** of the drug product, such as capsule or tablet.

Dispense details

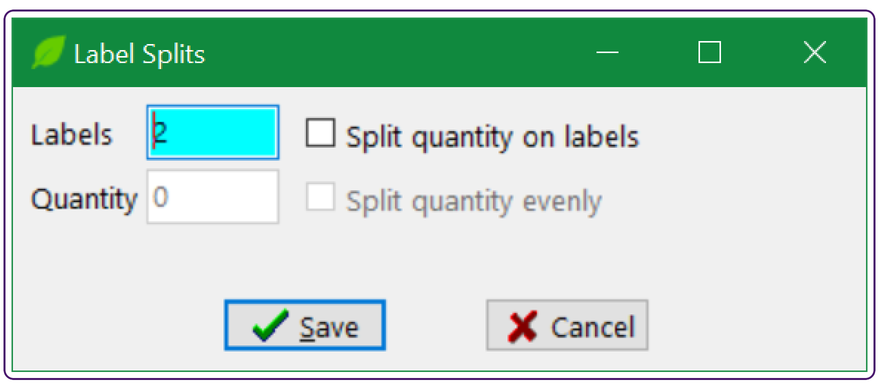


1. In the **Init** field, enter your user initials.

   Your system may be configured to automatically populate this field.
2. In the **Dispense Qty** field, enter the dispense quantity for the prescription.

   If you enter a dispense quantity, followed by a ‘P’, the dispense quantity will be multiplied by the pack size.
3. Enter the **Days** supply for the dispense quantity you entered.
4. If drug cannot be substituted, select a **Prod Sel**.
5. In the **O/W** field, optionally select how the Rx was received into the pharmacy.
6. Enter the number of vial **Labels** to be printed.

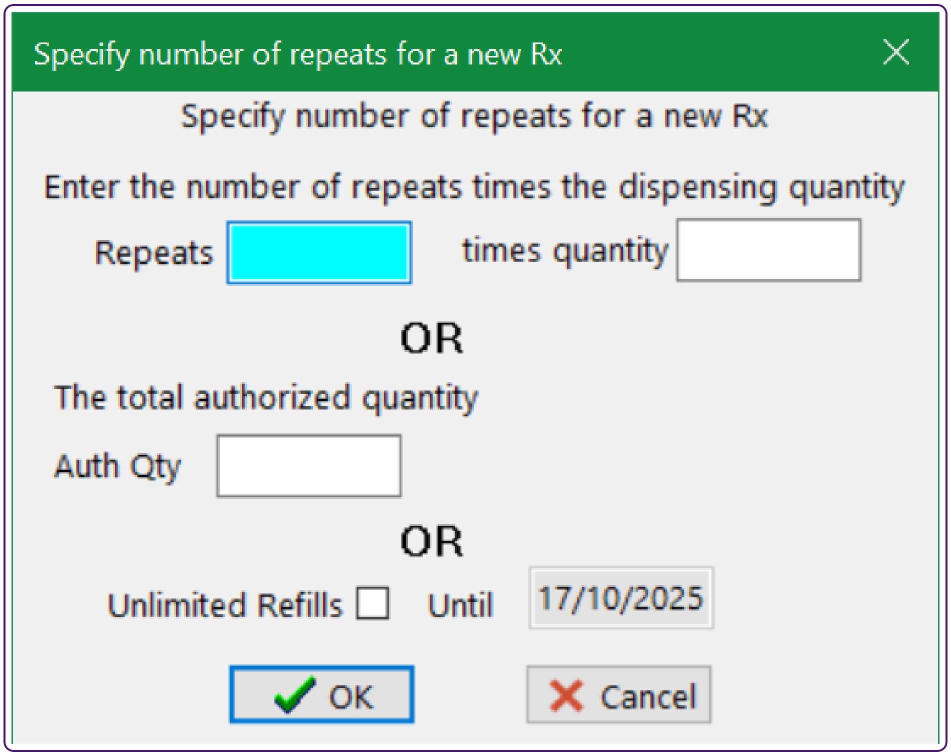
   If you enter 2 or more, you can select F2 to split the labels from the **Label Splits** pop-up.

   If you select **Split quantity on labels**, the quantity will be divided by the number of labels.
7. The value of the **Auth Qty** field is set based on the values of the **Disp Qty** and **Refills** fields. If this field is blank, enter the total authorized quantity for the prescription.

8. The **Rem Qty** field is automatically populated with read-only information pertaining to the number of pills not dispensed, based on the authorized quantity. The field to the right indicates the remaining refills based on the dispensed quantity that is currently populated.

   To change this number, select the **Rem Qty** button, then change the values of the fields on the **Specify number of repeats for a new Rx** pop-up.



9. The **G.P.%** (Gross Profit percentage) field displays read-only information that is based on the following calculation: (Rx Total $$$ - ACC)/Rx total $$$.
10. The **Acq Cost** (acquisition cost) field displays a read-only value based on the purchase price on the drug card.
11. The **Cost** field displays a read-only dollar amount calculated using the pricing strategies specific to cost.
12. The **Markup** field displays a read-only dollar amount calculated using the pricing strategies specific to markup.
13. The **Fee** field displays a read-only dollar amount calculated using the pricing strategies specific to fee.
14. The **Total** field displays a read-only dollar amount calculated using the pricing strategies specific to the sum of all the fields.

Processing the Rx

- After the Rx fields are populated, select **F12 - Fill Rx** to assign an Rx number to the prescription.

  This must be completed whether you are logging an Unfill, a Stock Transfer, a Not Dispensed, filling a new Rx, or saving changes on a modify. A prescription number is not created when you are modifying an Rx.

  The Rx will progress through the workflow actions available for your selected workflow type.
- To change the workflow actions, contact TELUS Health.

Prompt for AR

The AR prompt is displayed if the following is set up for your store:

- The AR module is enabled.
- The patient has an AR account.
- The **Charge Rxs** field in **File** > **Configuration** > **Store** > **AR** is set to **Prompt**.

  If these criteria are not met, this workflow action is skipped.

The AR prompt asks you if you want to charge the Rx.

- If you select **Yes**, the cash remainder will be charged to the patient's AR profile.
- If you select **No**, nothing will be charged to the patient's AR profile.

Refill Reminder and Auto Refill prompts

You may be asked whether you want to enroll the patient in the Refill Reminder and Auto Refill programs, mark the Rx as an auto refill Rx, or send refill reminders.

For information on the Refill Reminder and Auto Refill programs, see the *Auto Refill Functionality guide*.

Pickup notification prompt

You may be asked whether you want the patient to be notified when their Rx is ready for pickup.

Prompt for medication reviews

Depending on your province and store configuration settings, you may be prompted to perform a medication review if the patient is eligible.

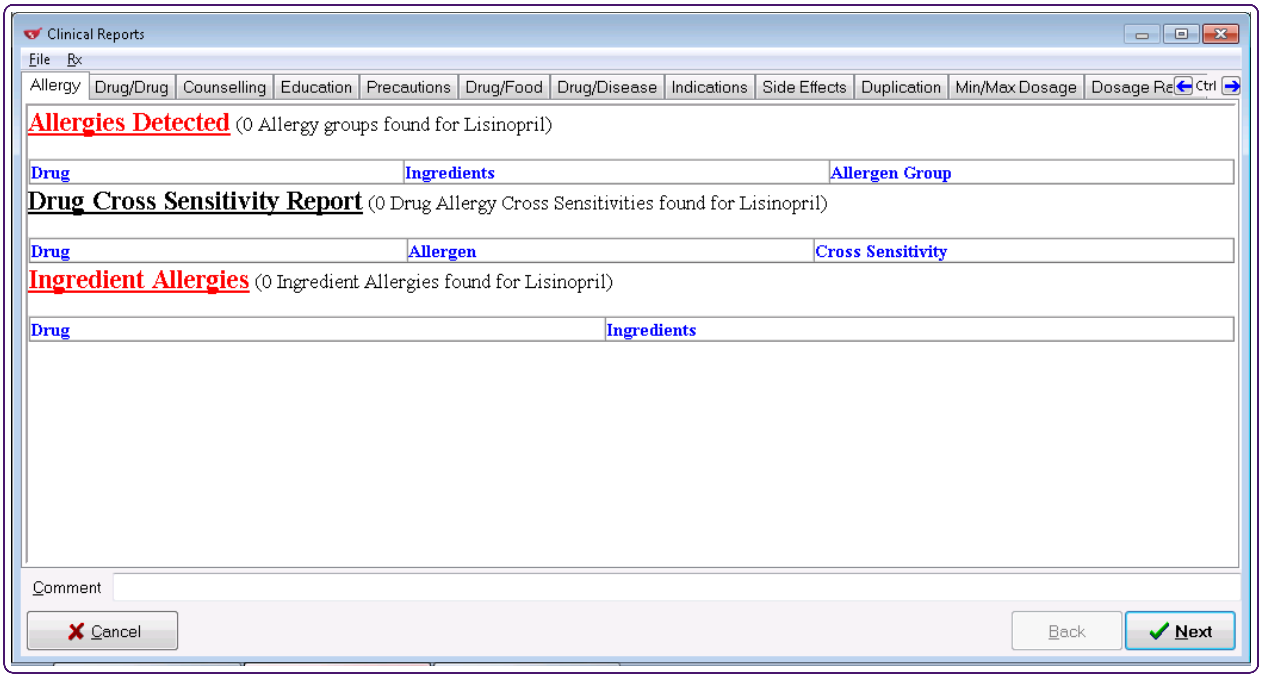
For information on medication reviews, see the *Electronic Medication Reviews Quick Tips* and *Paper Medication Reviews Quick Tips* documents.

Perform Local DUE

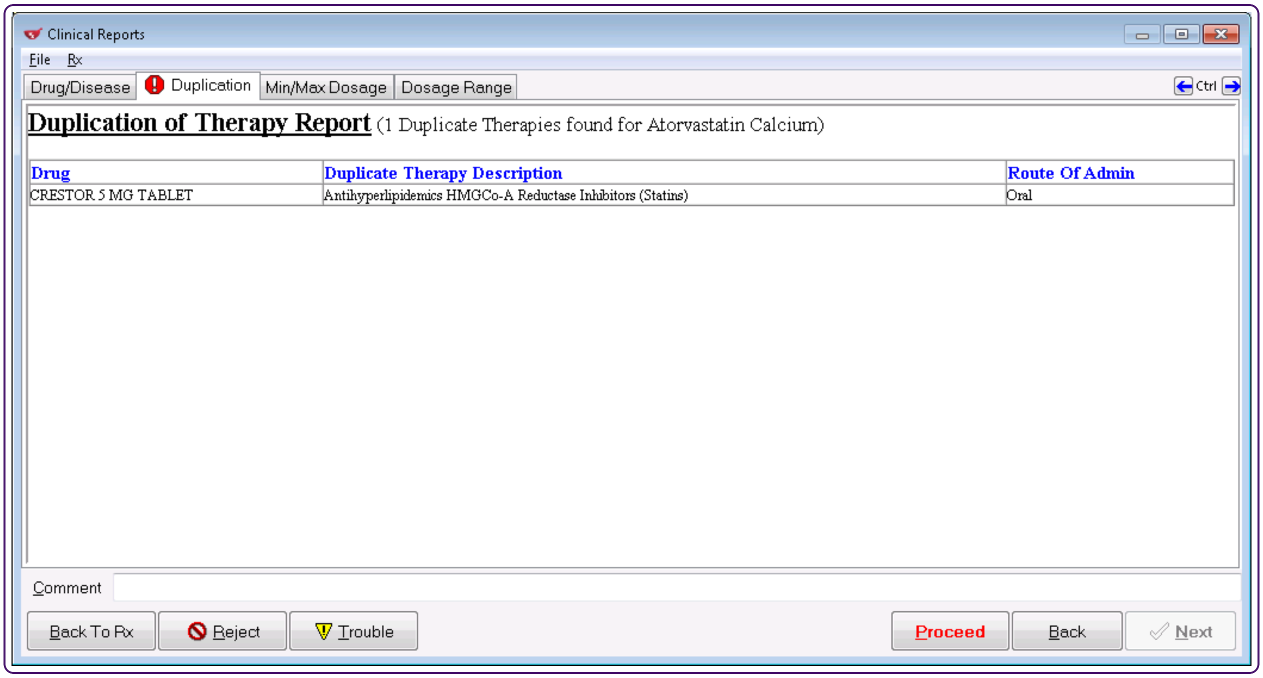
When you are filling an Rx, you can review the First Data Bank (FDB) clinical interactions analysis for a patient's profile. This occurs within the Perform Local DUE workflow action. The analysis is based on information in the patient profile and the selected drug.

The results of this analysis are displayed in the **Clinical Reports** window, under separate tabs across the top of the window. Which tabs are displayed depend on the settings in **File** > **Configuration** > **Store** > **FDB**. Click **Next** to proceed through the tabs.

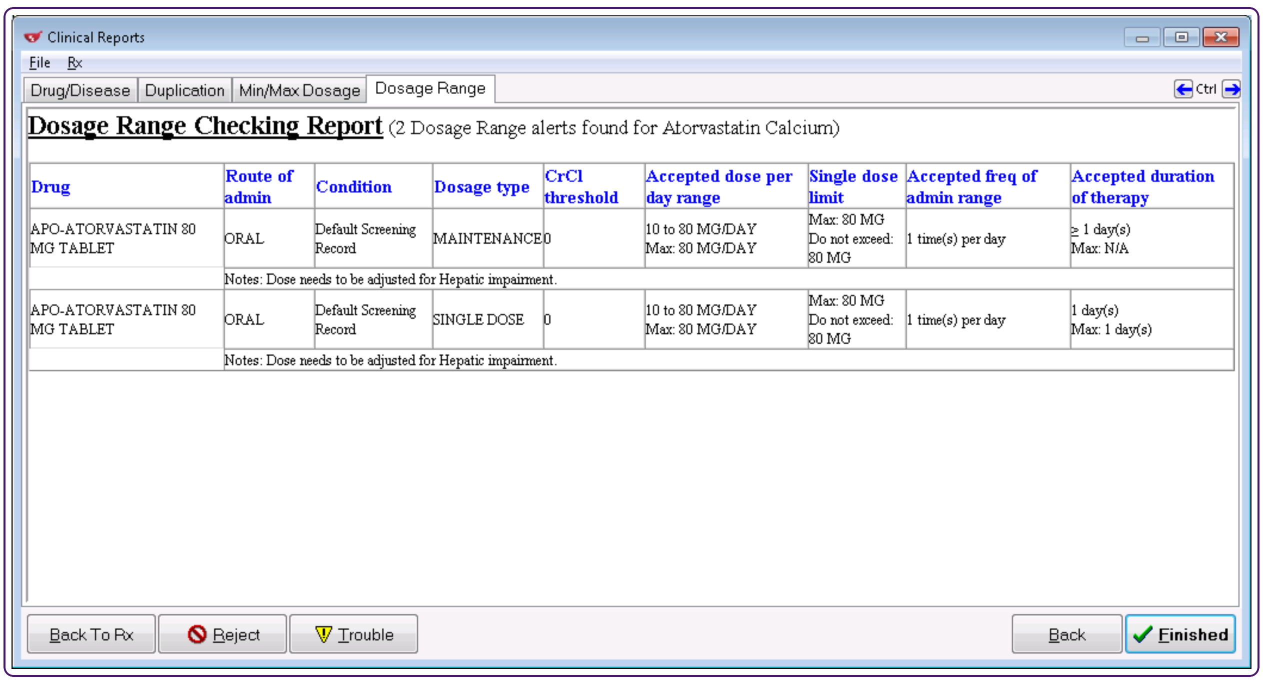
There is also an option to print the clinical report by selecting **File** > **Print**, as well as an option to counsel the patient at pickup from the **Rx** menu.



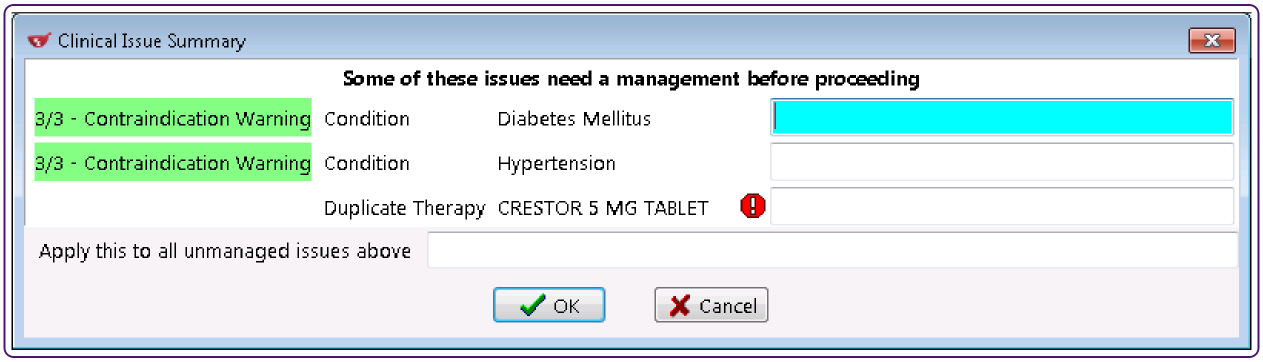
A **Proceed** button is displayed if an interaction needs to be viewed. You cannot bypass a required tab.



A **Finish** button is displayed on the last tab. Select it to close the **Clinical Reports** window.



Depending on you store configuration settings, you may be required to manage interactions. After you select the Finished button on the **Clinical Reports** window, a **Clinical Issue Summary** window is displayed.



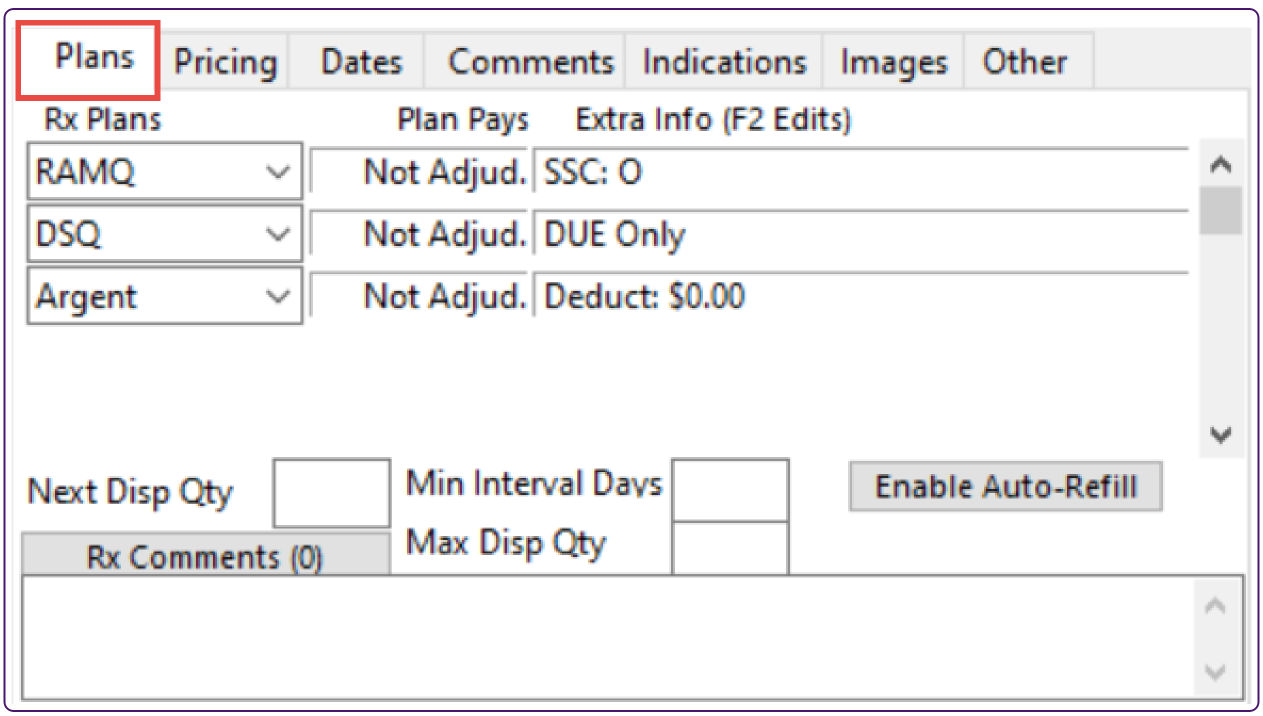
Allocating inventory

Allocating inventory is the process of obtaining the dispensing amount from the on hand quantity for the selected drug. This action happens in the background; no prompts are displayed unless insufficient inventory is available.

Adjudication to Real Time Insurance

After the prescription has been approved locally, the next step is to complete adjudication and bill the online insurance plan(s). Each Rx adjudicates to the plan(s) listed within the **Plans** tab, in the sequence they appear in the Rx.

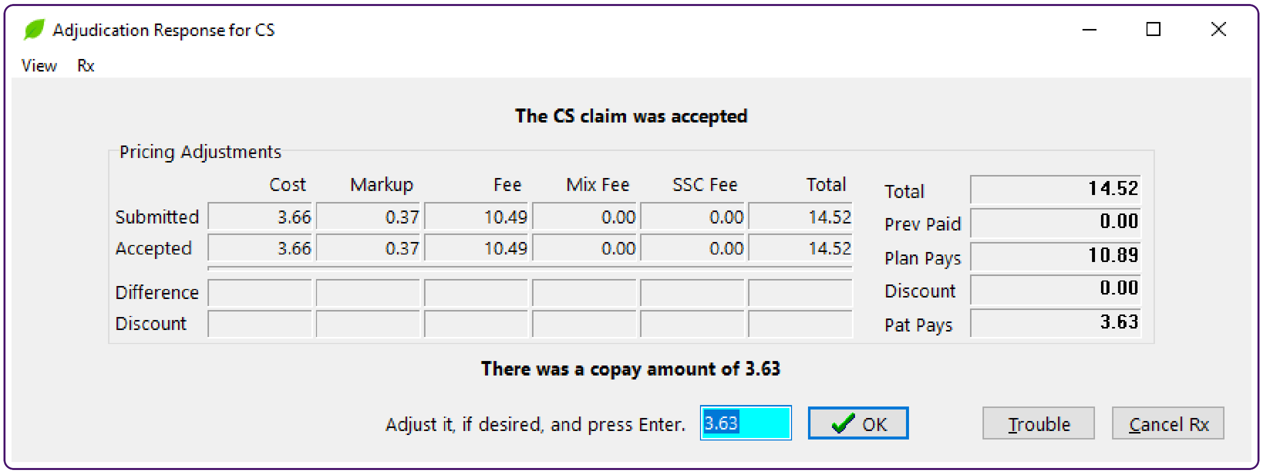
In the example below, three plans are listed. This Rx will first bill RAMQ, then DSQ, and the remainder will be billed to cash, which is the final amount the patient pays.



If the patient has more than one instance of the same plan, the plan code is displayed with the plan order in brackets.

Adjudication Response window

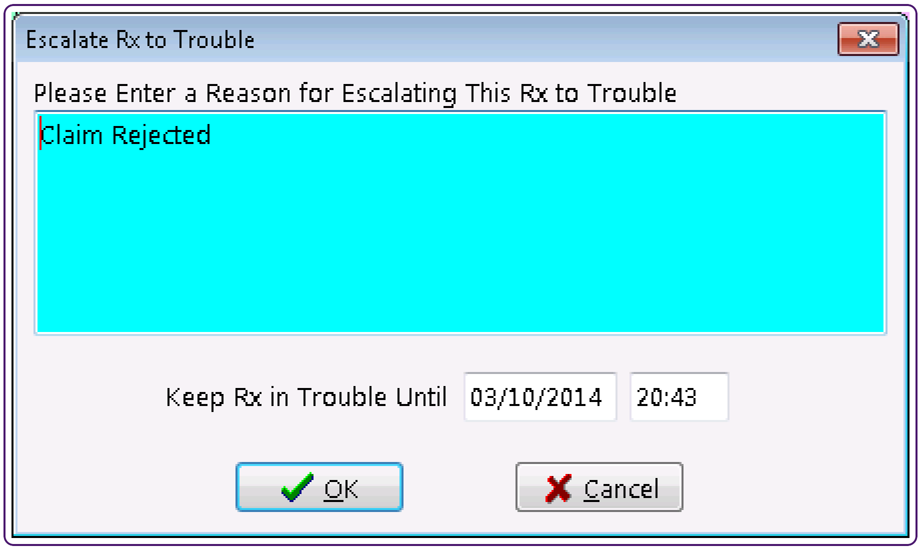
The **Adjudication Response** window is displayed when you are billing electronic online plans at the Complete Adjudication stage. It is displayed for each plan the Rx is being billed to, until the total cost has been fully paid.



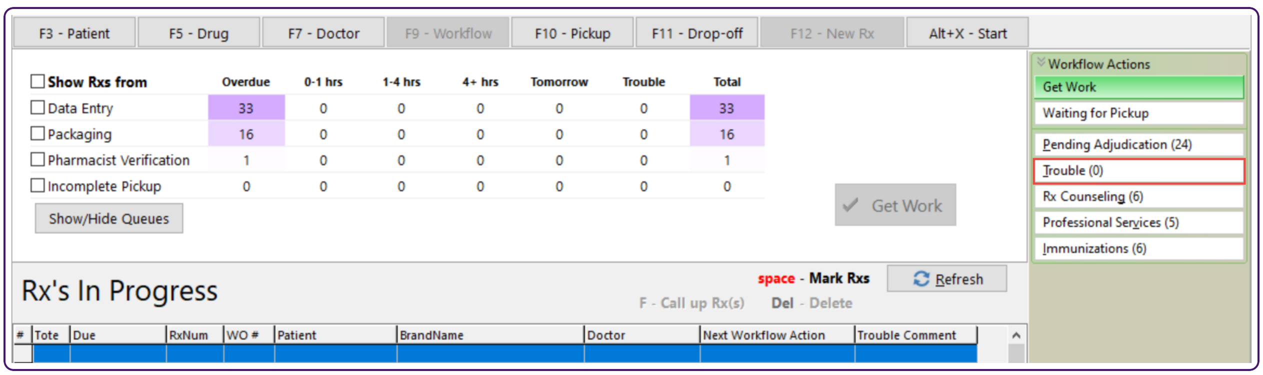
The following table describes the fields on this window.

Name	Description
Submitted	The pricing breakdown of what is billed to the plan.
Accepted	The pricing breakdown of what is accepted from the plan.
Difference	The difference between what was submitted and accepted from the plan for each cost field.
Total	The entire Rx Total calculated in Kroll.
Prev Paid	The sum of payments towards this Rx that were billed before this plan.
Plan Pays	The total amount this specific plan has paid.
Pat Pays	The amount the patient must pay.

If the **Trouble** button is displayed, and you select it, the Rx is placed in the Trouble queue for a specified amount of time. This moves the Rx out of the queue priority so that other Rxs can be processed. An **Escalate Rx to Trouble** window is displayed, where you can enter a reason for sending the Rx to the Trouble queue. Enter a date and time in the **Keep Rx in Trouble Until** fields.



To access the **Trouble** queue, call up the **F9 - Workflow** window and select **Trouble** from the right navigation pane.



If you select **Cancel Rx**, the Rx is reversed.

Rejection messages

If a plan rejects a claim, the **Adjudication Response** pop-up displays a rejection code and the reason the claim was rejected. Select the **Interventions** button to display a list of available intervention codes that you can use to potentially override the rejection, or select **Enter custom Free Form code** to enter your own code.

- If you select **Back to the Rx**, the **Adjudication Response** window closes, and you are directed back to the F12 window to make changes to the Rx. When you have made your changes, click F12 to retry the adjudication.
- If you select **Bill Manually**, the remainder of the cost is manually billed to the plan rather than being billed online. In this case, the pharmacy is required to submit a claims invoice to the insurance company in order to receive payment.

- If you select **Trouble**, the Rx is placed in the Trouble queue for a specified amount of time. This moves the Rx out of the queue priority so other Rxs can be processed. An **Escalate Rx to Trouble** window is displayed where you can enter a reason for sending the Rx to the Trouble queue. Enter a date and time in the **Keep Rx in Trouble Until** fields.

  You can access the **Trouble** window from the **F9 - Workflow** window, by selecting **Trouble** from the right navigation pane.

- If you select **Cancel Rx**, the Rx is reversed.

Cost differences

The **Adjudication Response** pop-up appears if there are cost differences between what was submitted to the insurance company and what was accepted from the plan. From here, you must provide a reason for each pricing field that contains a cost difference. If this is not the last Rx plan before cash, you will be asked if you want to charge the cost difference to the next third party.

- If you select **No**, the system will waive the cost difference on the Rx.
- If you select **Yes**, you will be able to change the cost difference amount.
- If you click **OK**, the system will ask the same question for any remaining cost difference field(s), and then send the difference to the remaining online plan, or charge the patient.

Completing the prescription

When the above steps are completed successfully, the Rx has been billed and processed successfully. A label is then printed.

Chapter 14

Cycle Counts

You can use the cycle count feature to manage the quantities of drugs on-hand. This feature enables you to maintain an accurate inventory and efficiently track incoming and outgoing products. You can count ‘sections’ of inventory, such as specific schedules, manufacturers, drug types and therapeutic classes.

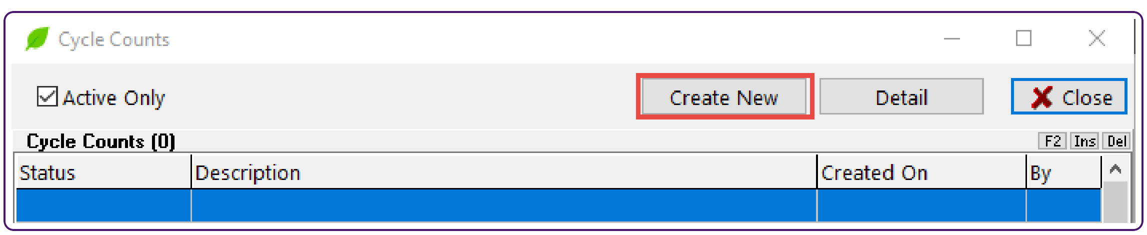
The cycle count process is a convenient way for inventory values to be verified during quiet periods; it is not intended solely for use in year-end inventory counts.

> Only pharmacists and pharmacy managers have permission to adjust inventory counts.

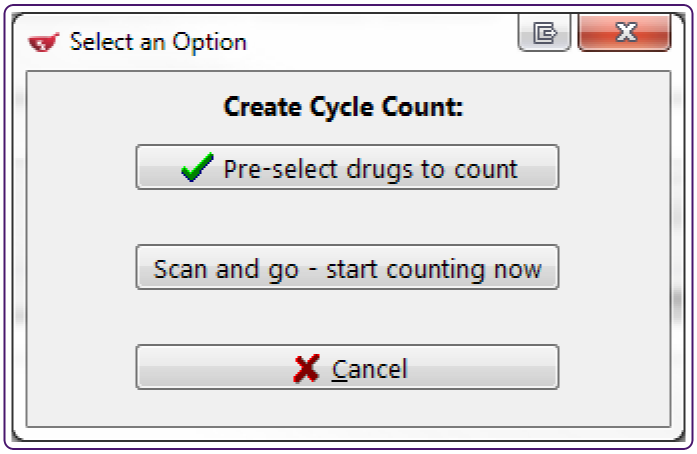
1. From the **Alt-X Start** window, select **Utilities** > **Drug** > **Drug Inventory Counts**.

   The **Cycle Counts** window is displayed.

2. Select **Create New**.

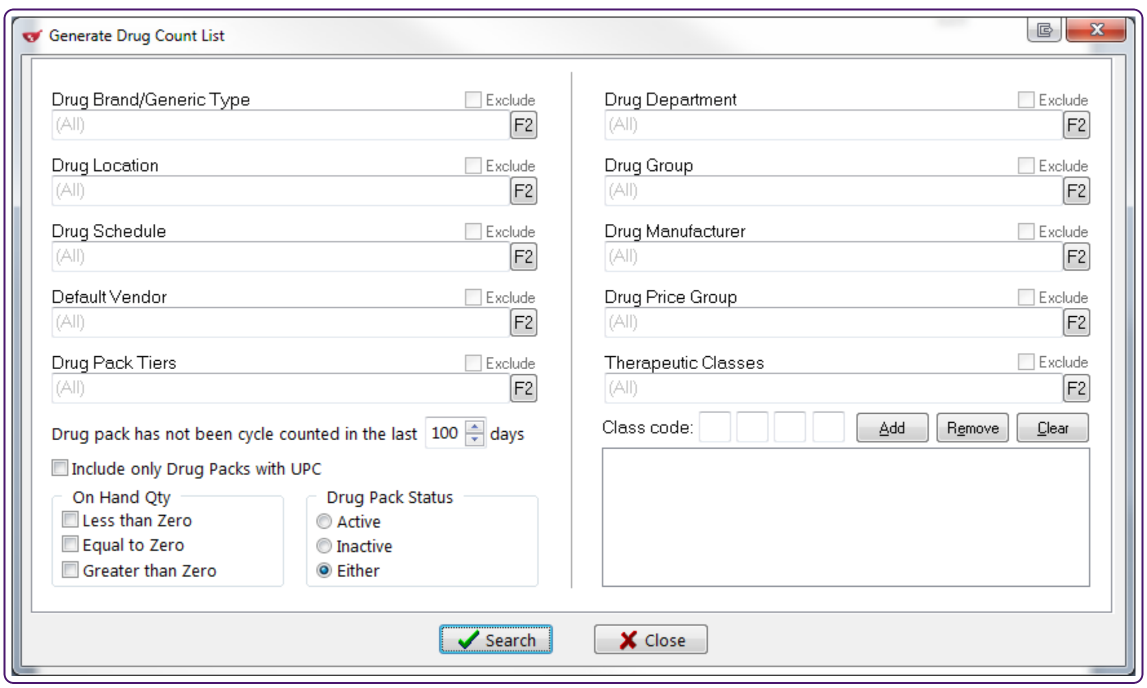


3. Select an option from the **Create Cycle Count** prompt.



Pre-select Drugs to Count

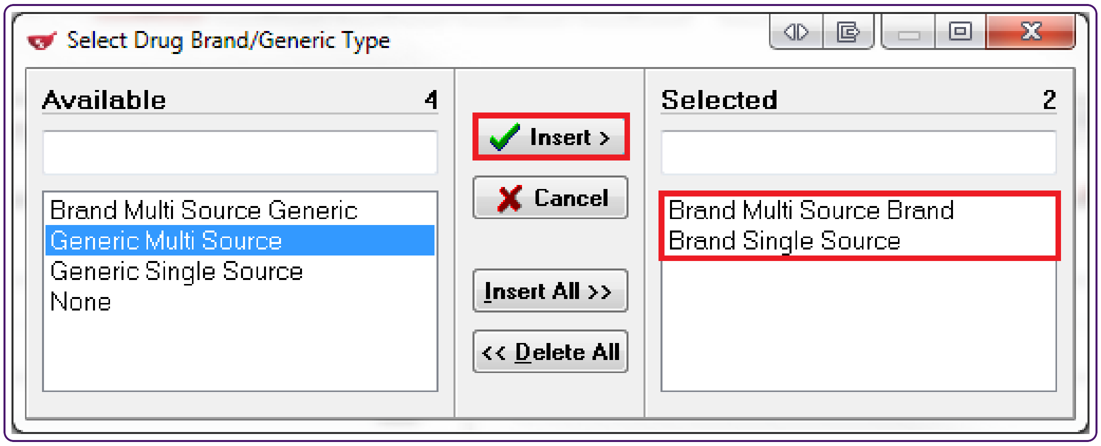
1. If you select **Pre-select drugs to count**, the **Generate Drug Count List** form displays the options available for the specific types of drugs that can be counted.



2. To select criteria for the pre-selected drugs:
   - Select the **F2** button next to each field.
   - From the **Available** column, select the applicable option, then select **Insert**.

     The item is added to the **Selected** column.

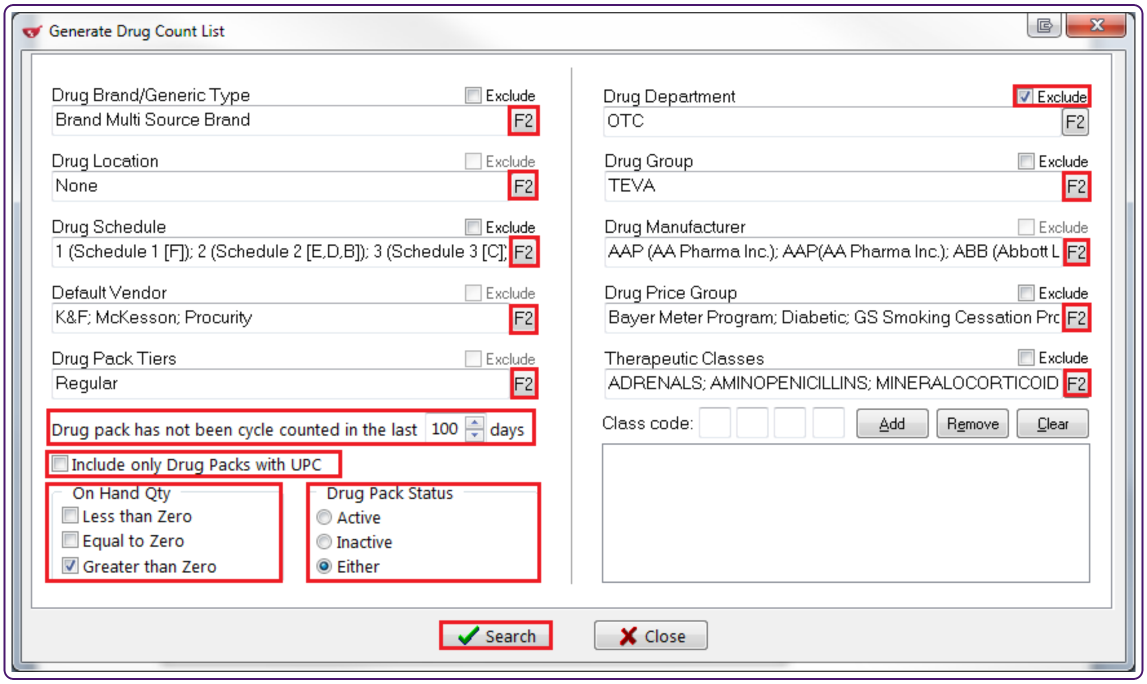
     Repeat this step for each field you want to select criteria for.



   - Select **Exclude** to exclude a category from the cycle count.
   - Use the **Drug pack has not been cycle counted in the last [x] days** field to specify a date range.
   - Select **Include only Drug Packs with UPC**, if necessary.
   - Use the **On Hand Qty** checkboxes to specify on on-hand quantity.
   - Select a **Drug Pack Status** to specify if you want to perform the cycle count for Active, Inactive, or Either type of drug.

     Any fields left blank default to (All).

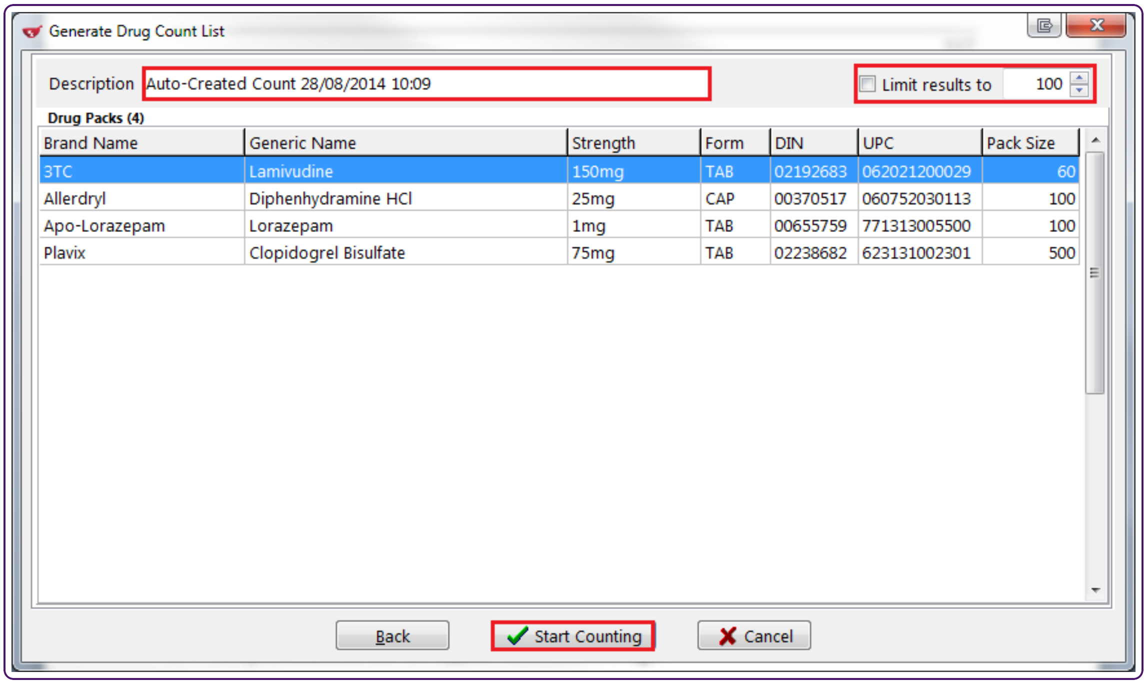
3. Select **Search**.



The **Generate Drug Count List** window is displayed.

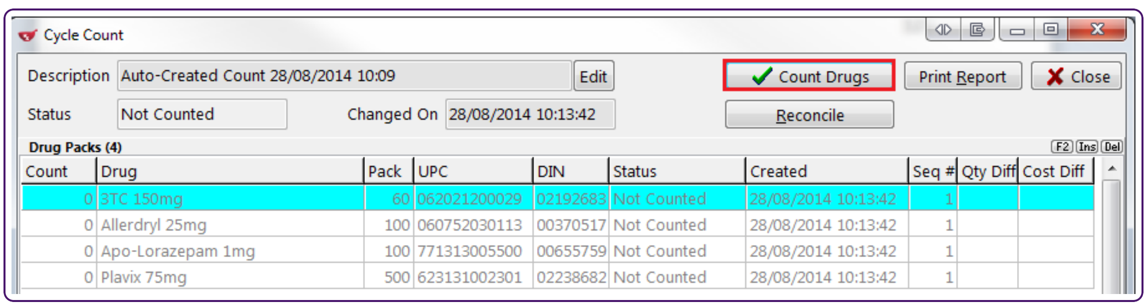
4. At this stage you can rename the drug count, and use the **Limit results to** option to specify the number of results you want to display.

5. Select **Start Counting**.



The selected drugs are placed used in the count.

6. Select **Count Drugs**.

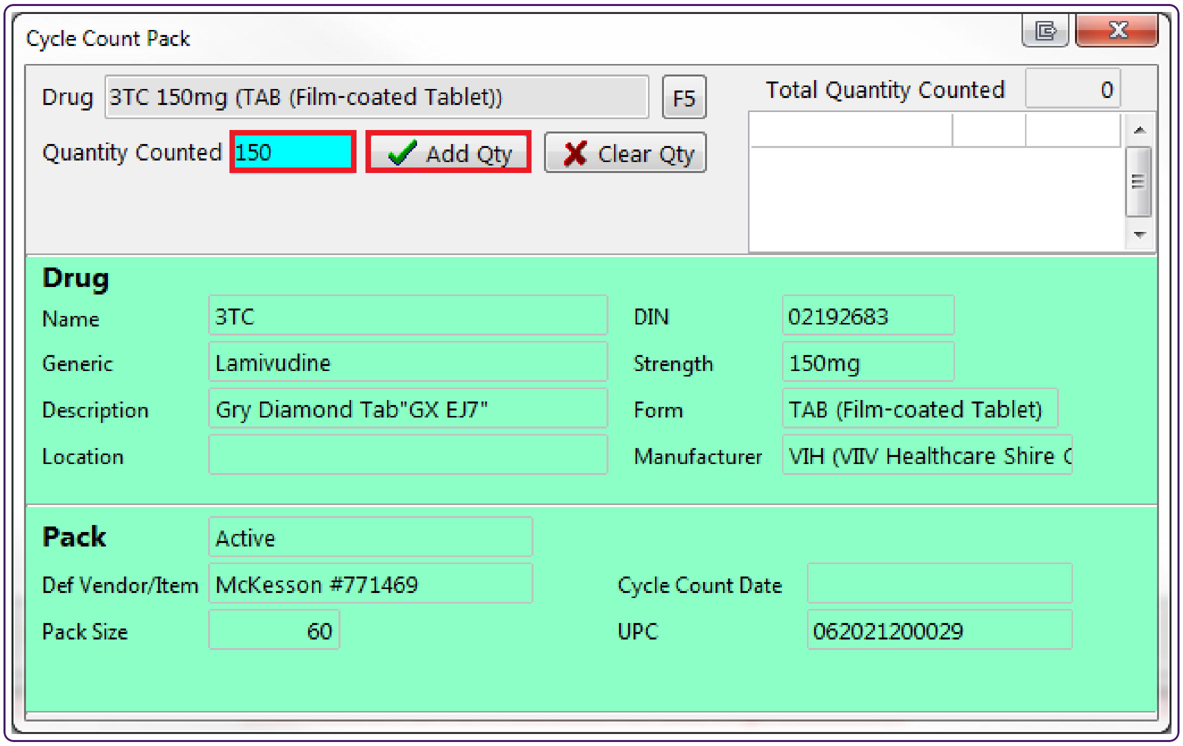


The first drug in the count appears in the **Cycle Count Pack** form.

7. In the **Quantity Counted** field, enter the number of pills that are in the stock bottle you just counted.

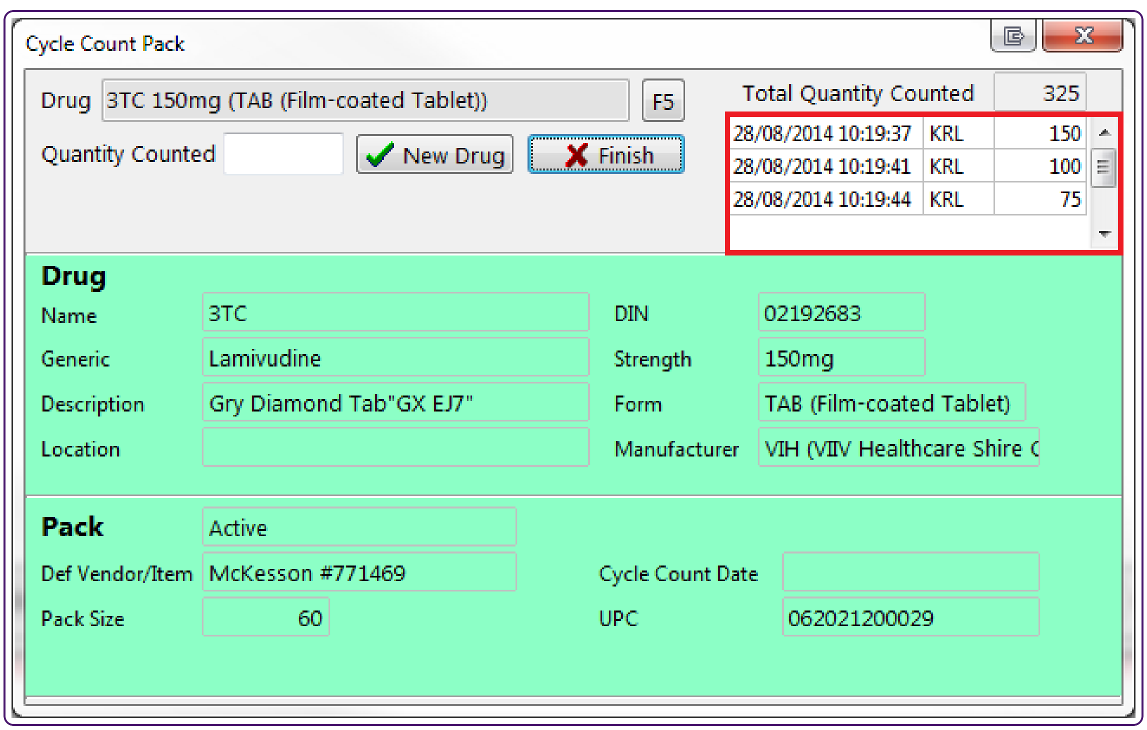
   If you counted the drug by number of packagers, you can enter this value followed by the letter P (e.g., 3P to specify three packagers).

8. Select **Add Qty**.



The **Quantity Counted** value appears in the **Total Quantity Counted** pane.

9. Repeat this step for each pack you have counted for that drug.



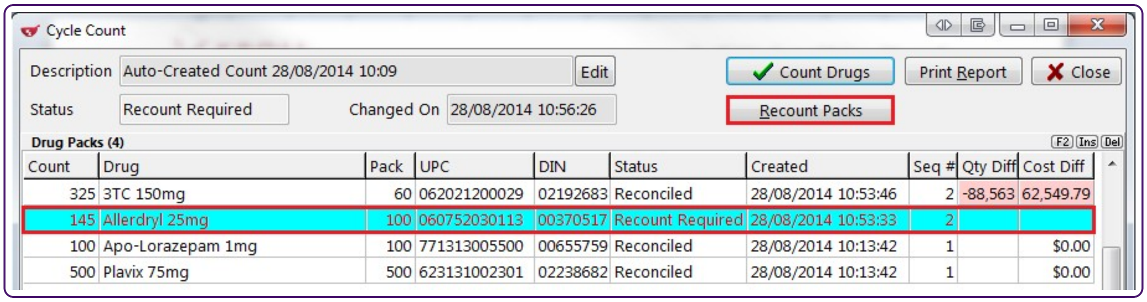
10. Repeat step 9 for each drug you want to count.

11. Select **Cancel** to close the **Cycle Count Pack** form.

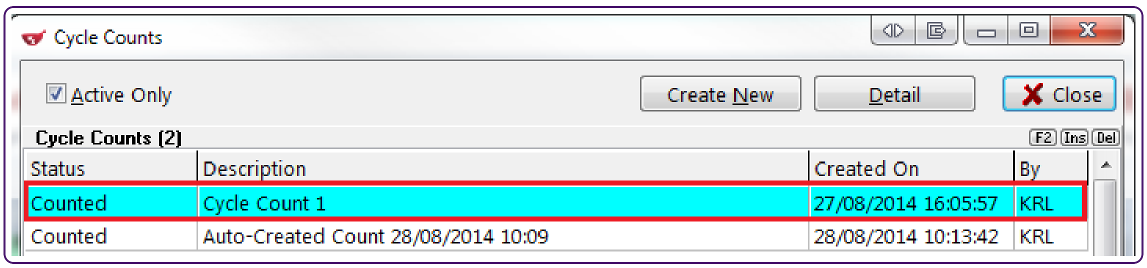
    The **Cycle Count** window shows a status of 'Reconciled' for each drug you just counted, and an updated **Count** value.

12. To recount a drug, highlight the drug record and select **Reconcile**.

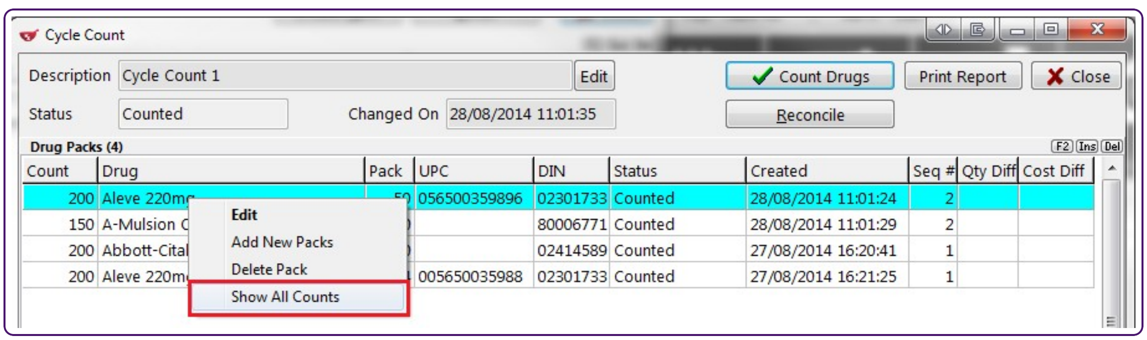
    The drug appears in red text and shows a status of **Recount Required**.



Highlight the drug record again and click **Count Drugs**. After all of the drug packs have been counted, the cycle count shows a status of **Counted**.

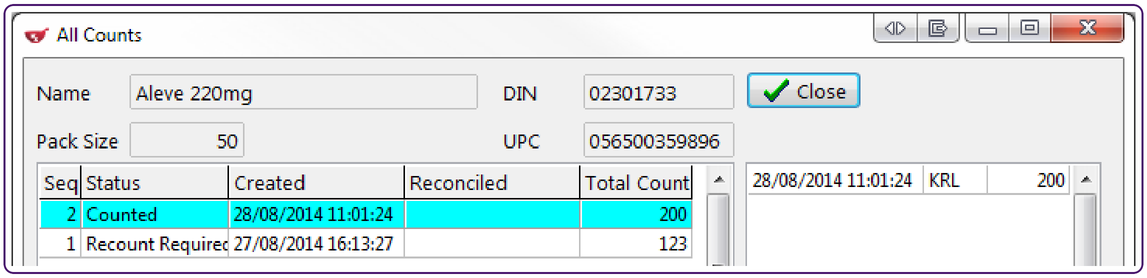


13. To view the counts for a drug, call up the **Cycle Count** window, right-click the drug for which you want to view counts, and select **Show All Counts**.



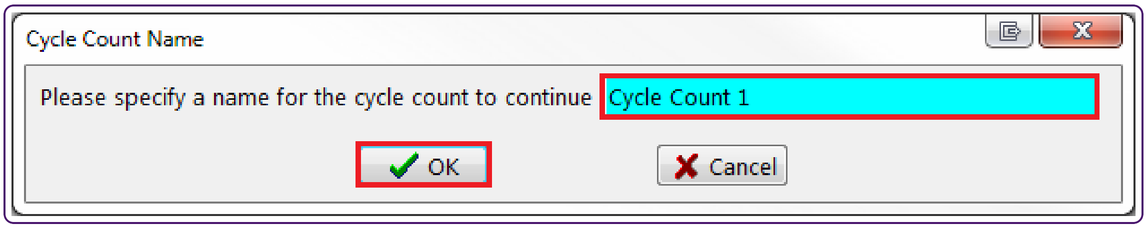
The **All Counts** window displays all counts for the selected drug.

14. Select **Close** to close the **All Counts** window.



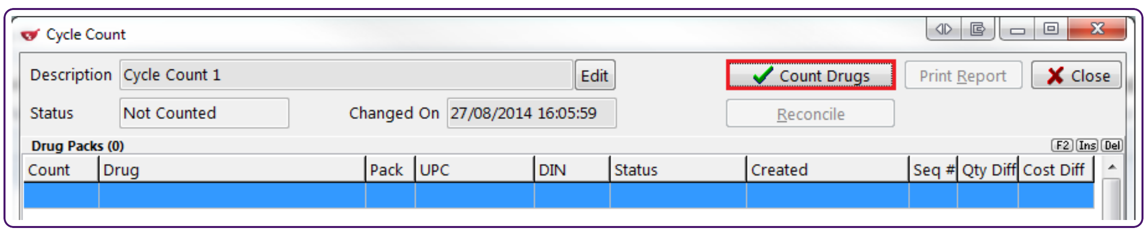
Scan and go - start counting now

1. Enter a **Cycle Count Name**, then select **OK**.



The **Cycle Count** window is displayed.

2. Select **Count Drugs**.

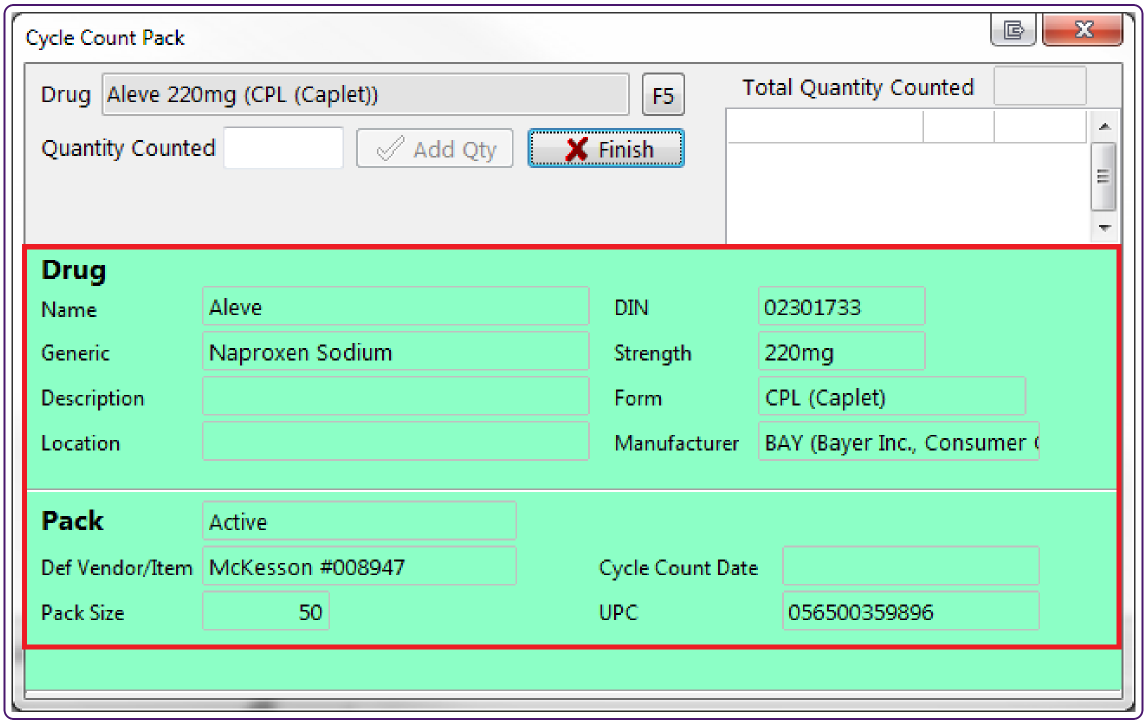


The **Cycle Count Pack** form is displayed.

3. Scan the first drug to be counted.

   If the drug does not have a UPC, select the F5 button next to the **Drug** field and complete a regular drug search.

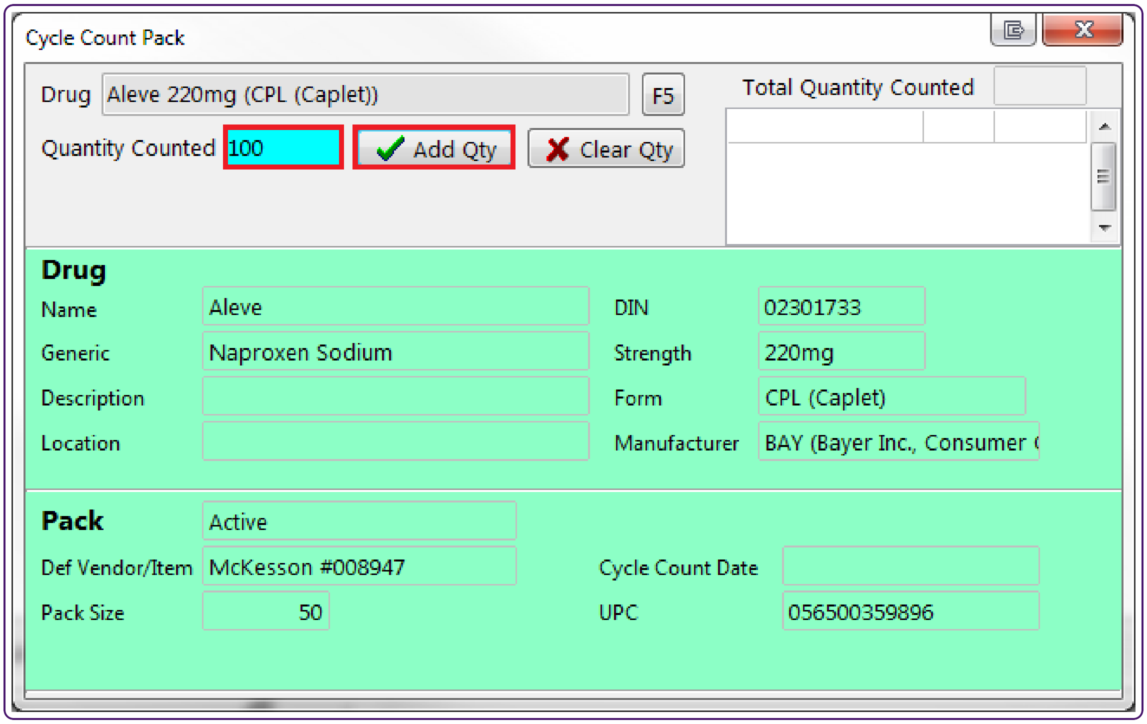
   The **Cycle Count Pack** form displays information about the scanned drug.



4. In the **Quantity Counted** field, enter the number of pills that are in the stock bottle you just counted.

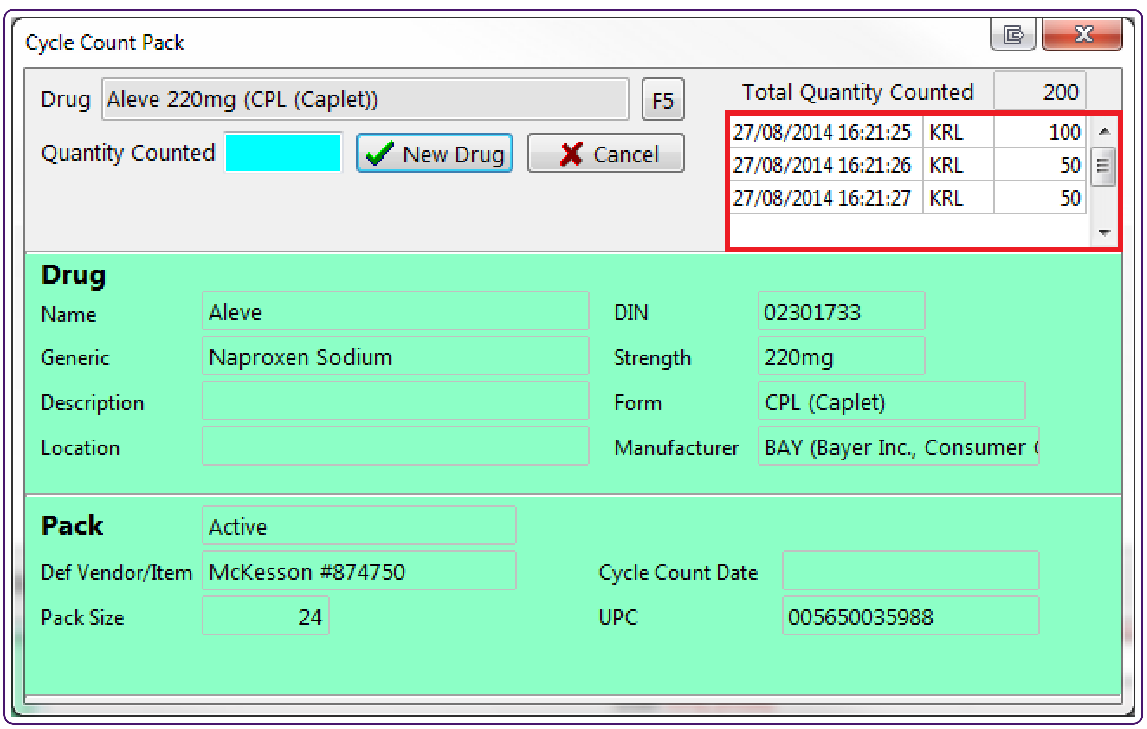
   If you counted the drug by number of packagers, you can enter this value followed by the letter P (e.g., 3P to specify three packagers).

5. Select **Add Qty**.



The **Quantity Counted** value appears in the **Total Quantity Counted** pane.

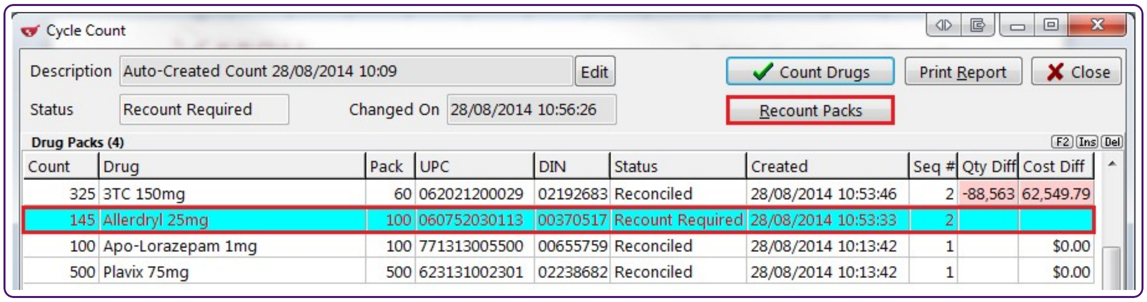
6. Repeat steps 4 and 5 for each pack you counted for that drug.



7. Repeat steps 3 to 5 for each drug you want to count.
8. Select **Cancel** to close the **Cycle Count Pack** form.

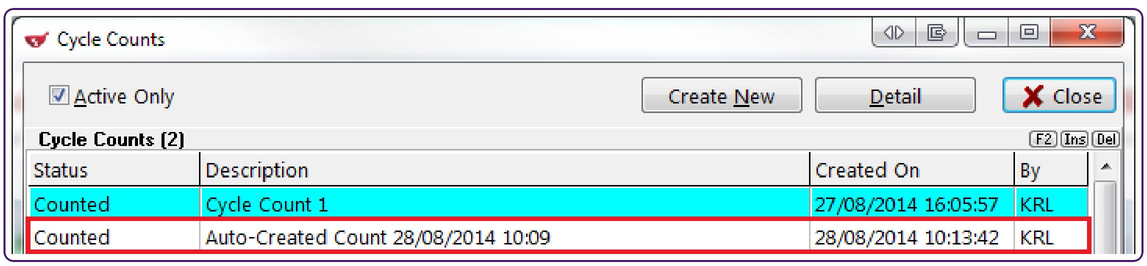
   The **Cycle Count** window shows a status of ‘Reconciled’ for each drug you just counted, and an updated **Count** value.
9. To recount a drug, highlight the drug record and select **Reconcile**.

   The drug is displayed in red text and it shows a status of **Recount Required**.

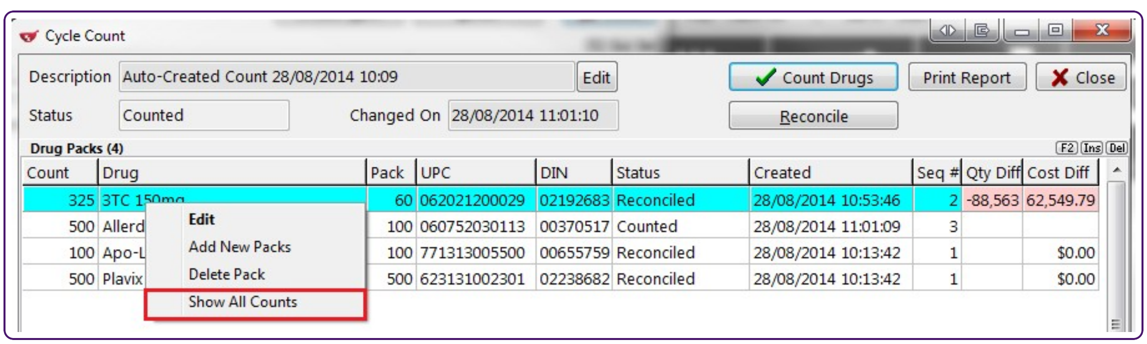


10. Highlight the drug record again and select **Count Drugs**.

    Repeat the previous steps as needed to recount the drug. After all drug packs have been counted, the cycle count shows a status of Counted.

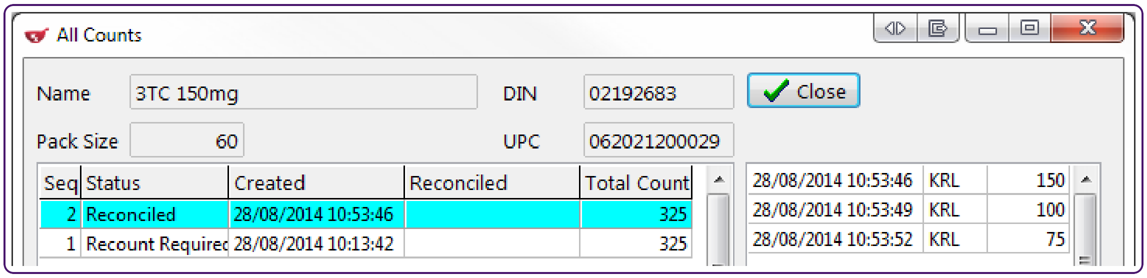


11. To view the counts for a drug, call up the **Cycle Count** window, right-click the drug you want to view counts for, and select **Show All Counts**.



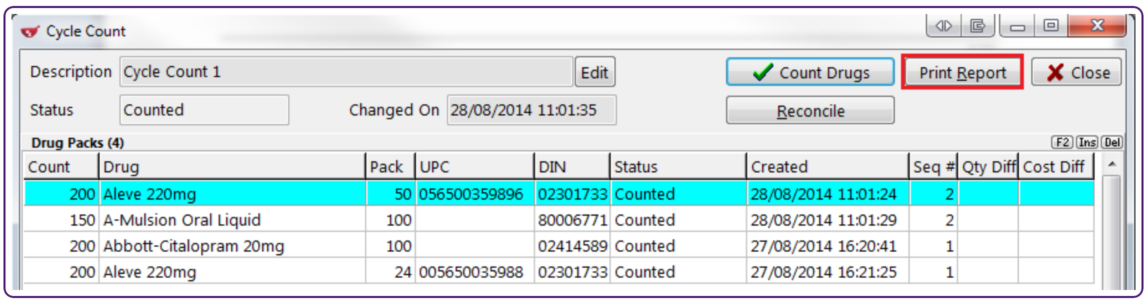
The **All Counts** window appears, displaying all counts for the selected drug.

12. Select **Close** to close the **All Counts** window.



Printing the Drug Inventory Count Report

1. After all drugs have been counted, call up the **Cycle Count** window for the selected cycle count and select **Print Report**.



2. Select the applicable printing options from the **Drug Inventory Count Report** form and select **Print**.

   The report is generated.

Chapter 15

Drug orders

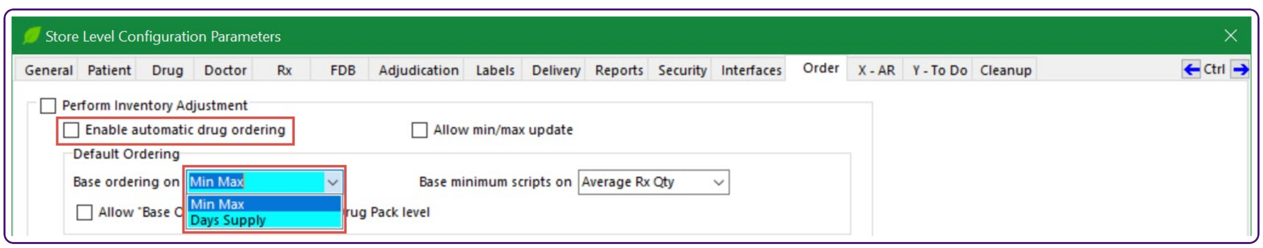
This section describes how to set up File Transfer Protocol (FTP) vendor ordering and receiving.

Creating a drug order

You can create a drug order automatically or manually. You can also order a drug directly from its card.

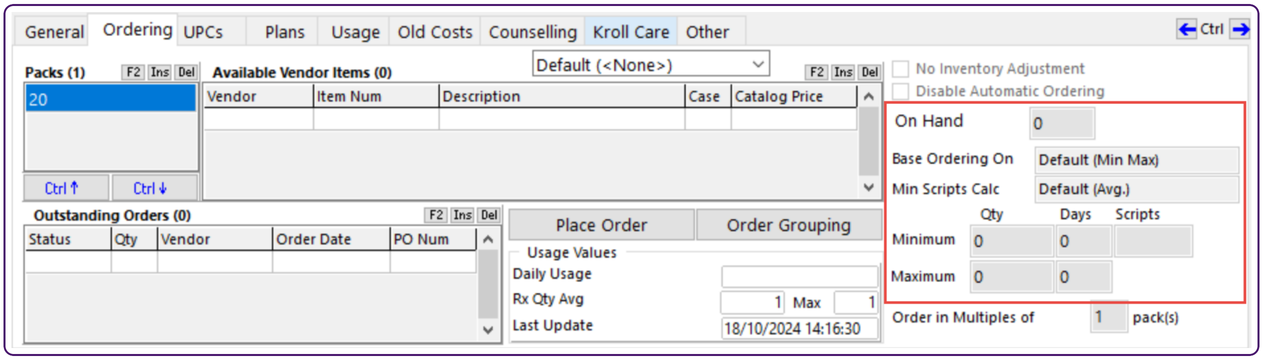
Automatic orders (perpetual inventory)

For drugs to be automatically ordered, the **Enable automatic drug ordering** checkbox must be selected via **File** > **Configuration** > **Store** > **Order**.

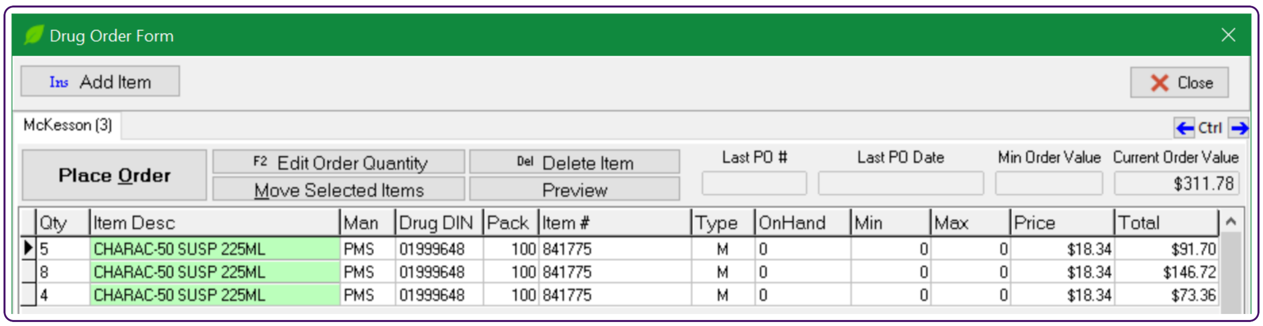


The value of the **Base ordering on** field determines when automatic ordering is triggered.

- If you select **Min/Max**, automatic ordering is triggered when the **On Hand** value on the **Ordering** tab is below the **Minimum Qty**.
- If you select **Days Supply**, automatic ordering is triggered when the **On Hand** value on the **Ordering** tab is below the **Minimum Days**. This value is determined by the average sales levels of the drug.



When you select **Utilities** > **Drug Ordering** > **Generate Orders**, the system checks for drugs with automatic ordering enabled and **On Hand** values lower than their **Minimum** values, and adds these to an order similar to the following:



Manual orders

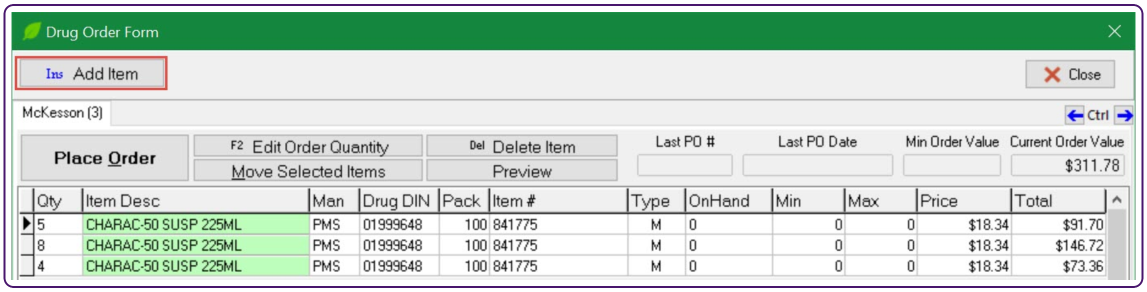
If **Manual** ordering is selected, you can choose which items you want to order.

Method 1: Ordering from the Drug Order Form

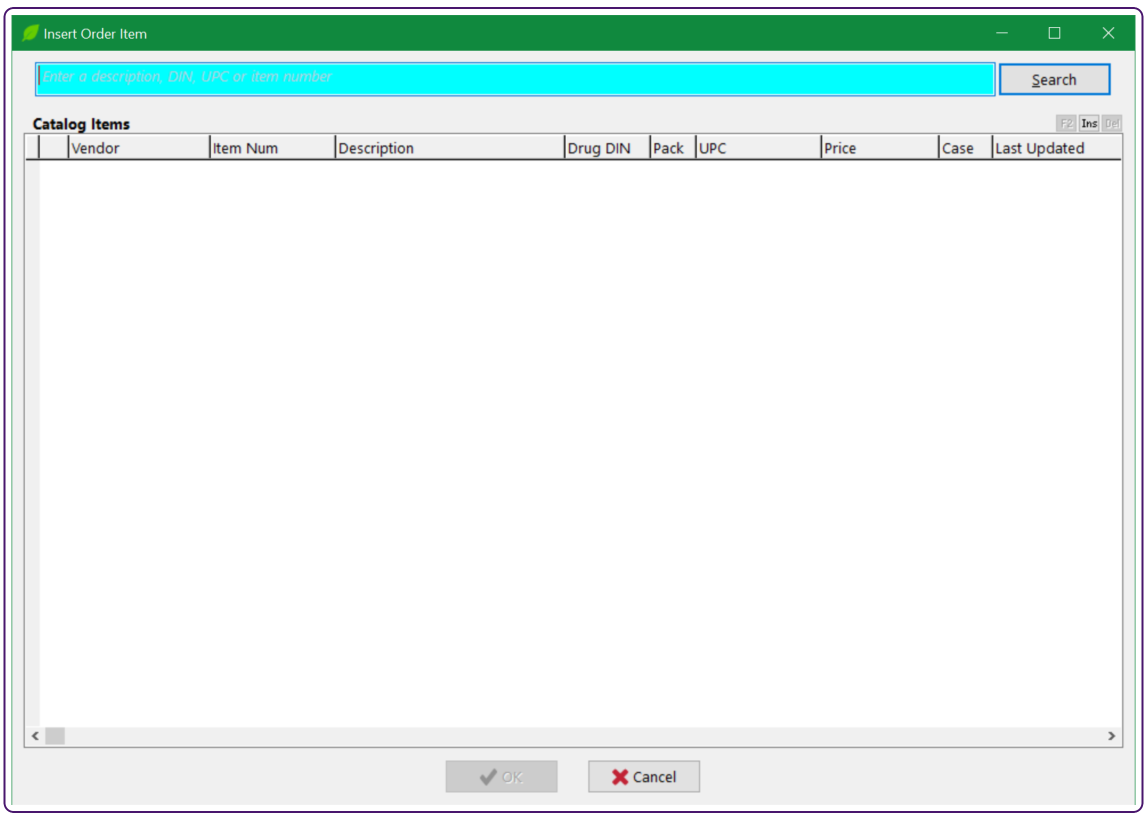
1. From the menu, select **Utilities** > **Drug Ordering** > **Generate Orders**.

   The **Drug Order Form** is displayed.

2. Select **Add Item**.



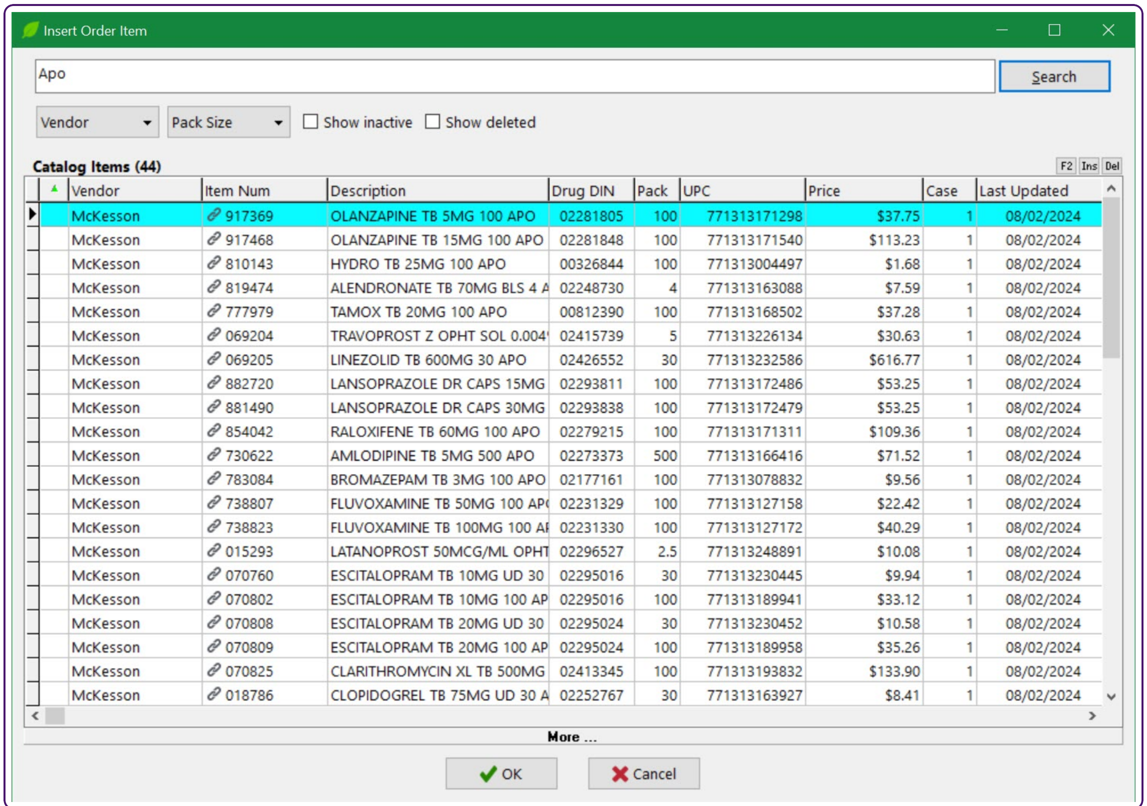
The **Insert Order Item** window is displayed.



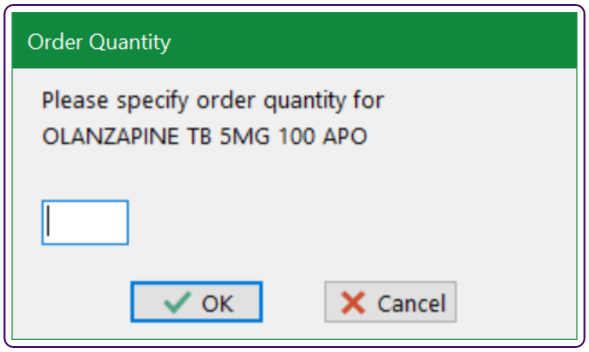
3. Search for items using one of the following criteria:
   - Description
   - Drug Identification Number (DIN)
   - Item Number
   - Pack Size
   - UPC

> The method used to search for drugs in the wholesale catalog is differing from the method used to search for drugs in Kroll. For example, searching for Altace 10mg by typing “Altace, 10” in the search field will not yield any results.

4. Highlight the drug and select **OK** to add it to the order.



5. Enter the quantity you want to order, then select **OK**.

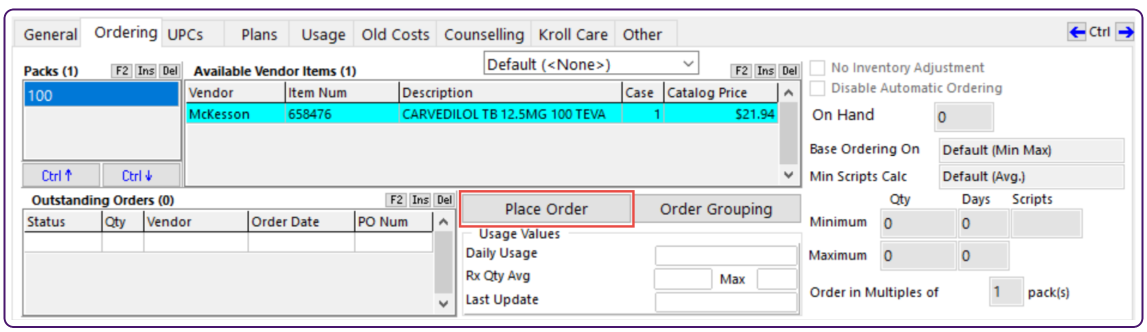


The **Insert Order Item** pop-up is displayed again, so you can select additional items to add to your order.

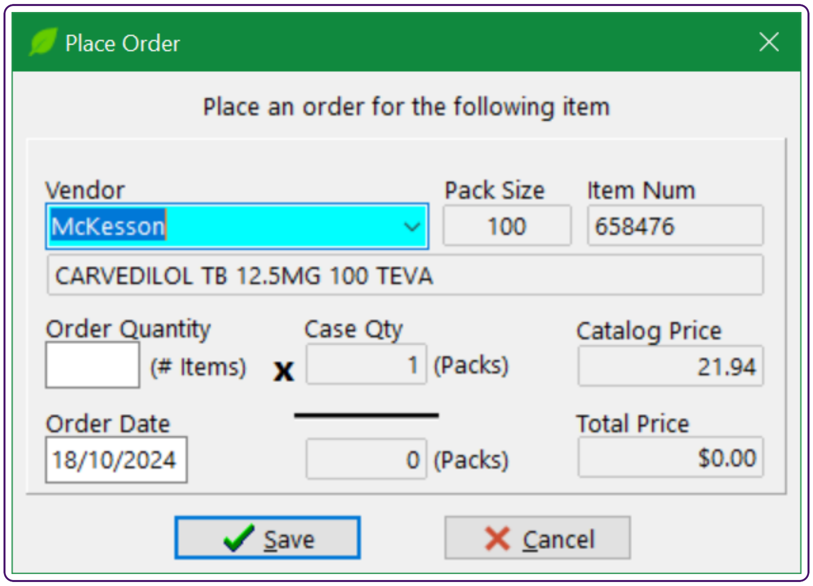
Ordering from the drug card

You can also order a drug directly from its card.

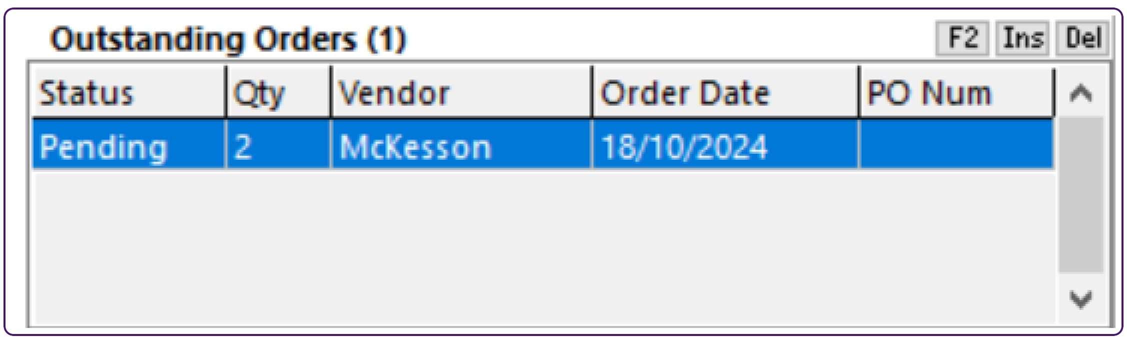
1. From the drug card, select the **Ordering** tab.
2. Select **Place Order** beneath the **Available Vendor Items** list.



3. Select the appropriate **Vendor**, enter a **Quantity**, and select **Save**.



Your order is added to the **Outstanding Orders** list in the bottom left hand corner of the **Drug** window.



Min/Max versus days supply ordering

There are two ways to set reorder points for drug products: Min/Max ordering and days supply ordering. In both cases, the applicable drug is placed on order when the **On Hand** value drops below the **Minimum** value, if automatic ordering is set up for the drug. If you enter a **Maximum** value, the system orders that number of drugs.

When Min/Max ordering is activated, the **Days** fields of the **Ordering** tab of the drug card are greyed out because you have manually populated the minimum and maximum values. When **Days Supply** ordering is activated, the **Minimum** and **Maximum** fields are greyed out and the **Days** fields are editable.

The following sections describe the benefits and drawbacks of each type of reordering.

Min/Max ordering

- You can use the **Minimum** value to control the exact point at which a drug is reordered.
- The **Minimum** and **Maximum** values do not change once they are set because the values are independent of usage. This is particularly useful for drugs that need to be overstocked or under-stocked.
- **Minimum** and **Maximum** values have to be set manually for each drug record because dosage formats and usage will vary from product to product. **Minimum** and **Maximum** values do not change once they are set, so users must manually adjust min/max values during spikes or dips in product usage.

Days supply ordering

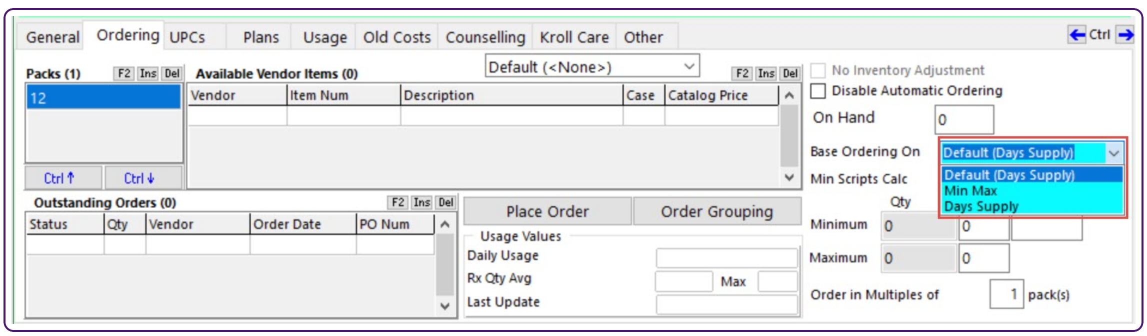
- The **Min/Max** fields are calculated values based on the days supply. These reorder points are dynamic values that increase or decrease depending on how often the drug is dispensed within the days supply indicated. This is particularly useful for cyclical drugs like allergy medications that are dispensed frequently during some parts of the year, but less during others.
- As the **Minimum** and **Maximum** fields are calculated values, you have less control over the exact point the drug is placed on order. You cannot overstock or understock.

Applying min/max ordering to a drug

All drugs default to use days supply overriding, but you can manually apply min/max ordering to specific drugs as needed.

1. From the **F5 - Drug** search window, select the applicable drug record.
2. Select the **Ordering** tab.
3. Set the **Base Ordering On** field to **Min/Max**.

   The **Days** fields are greyed out. The **Minimum** and **Maximum** fields become editable.



Potential drawbacks of days supply ordering

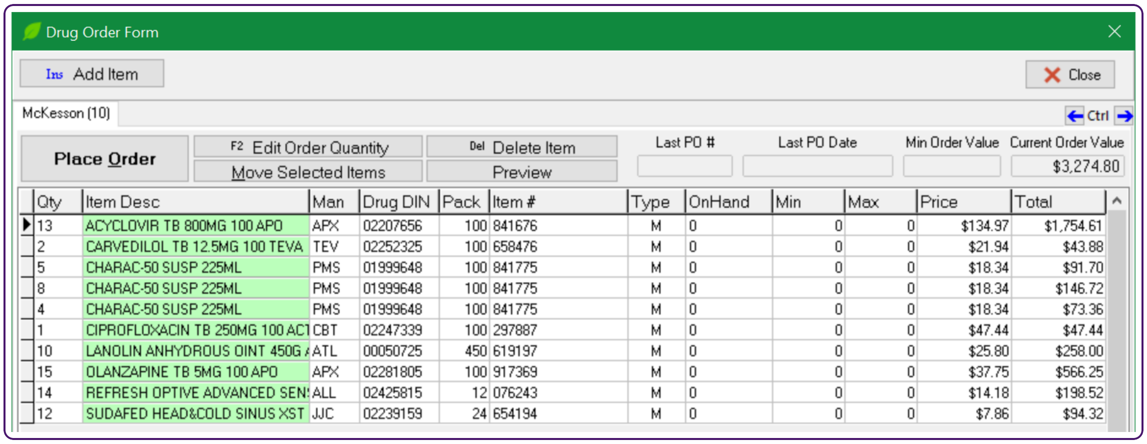
The Minimum and Maximum fields are not open for manipulation as they are now calculated values; this means users have less control over the exact point the drug is placed on order.

The Minimum and Maximum values change depending on how frequently the drug is dispensed; therefore, this may be a problem for products the pharmacy wishes to overstock or under-stock.

Sending a drug order

1. From the menu, select **Utilities** > **Drug Ordering** > **Generate Orders**.

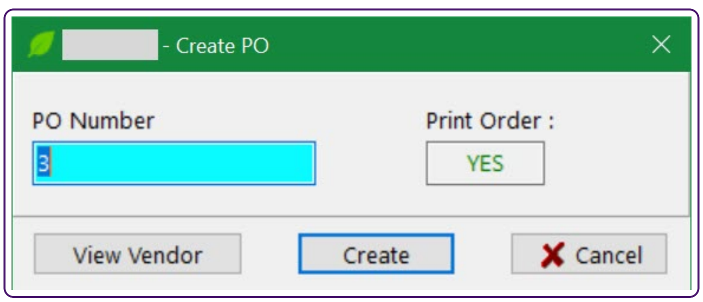
   The **Drug Order Form** is displayed.



Qty	Item Desc	Man	Drug DIN	Pack	Item #	Type	OnHand	Min	Max	Price	Total
13	ACYCLOVIR TB 800MG 100 APO	APX	02207656	100	841676	M	0	0	0	$134.97	$1,754.61
2	CARVEDILOL TB 12.5MG 100 TEVA	TEV	02252325	100	658476	M	0	0	0	$21.94	$43.88
5	CHARAC-50 SUSP 225ML	PMS	01999648	100	841775	M	0	0	0	$18.34	$91.70
8	CHARAC-50 SUSP 225ML	PMS	01999648	100	841775	M	0	0	0	$18.34	$146.72
4	CHARAC-50 SUSP 225ML	PMS	01999648	100	841775	M	0	0	0	$18.34	$73.36
1	CIPROFLOXACIN TB 250MG 100 ACT	CBT	02247339	100	297887	M	0	0	0	$47.44	$47.44
10	LANOLIN ANHYDROUS OINT 450G A	ATL	00050725	450	619197	M	0	0	0	$25.80	$258.00
15	OLANZAPINE TB 5MG 100 APO	APX	02281805	100	917369	M	0	0	0	$37.75	$566.25
14	REFRESH OPTIVE ADVANCED SEN	ALL	02425815	12	076243	M	0	0	0	$14.18	$198.52
12	SUDAFED HEAD&COLD SINUS XST	JJC	02239159	24	654194	M	0	0	0	$7.86	$94.32

2. Select **Place Order**.

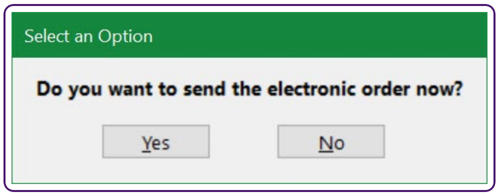
   The **Create PO** pop-up is displayed.



Optionally select **View Vendor** to view the read-only vendor settings.

3. Select **Create** or press Enter.

   The following pop-up is displayed:

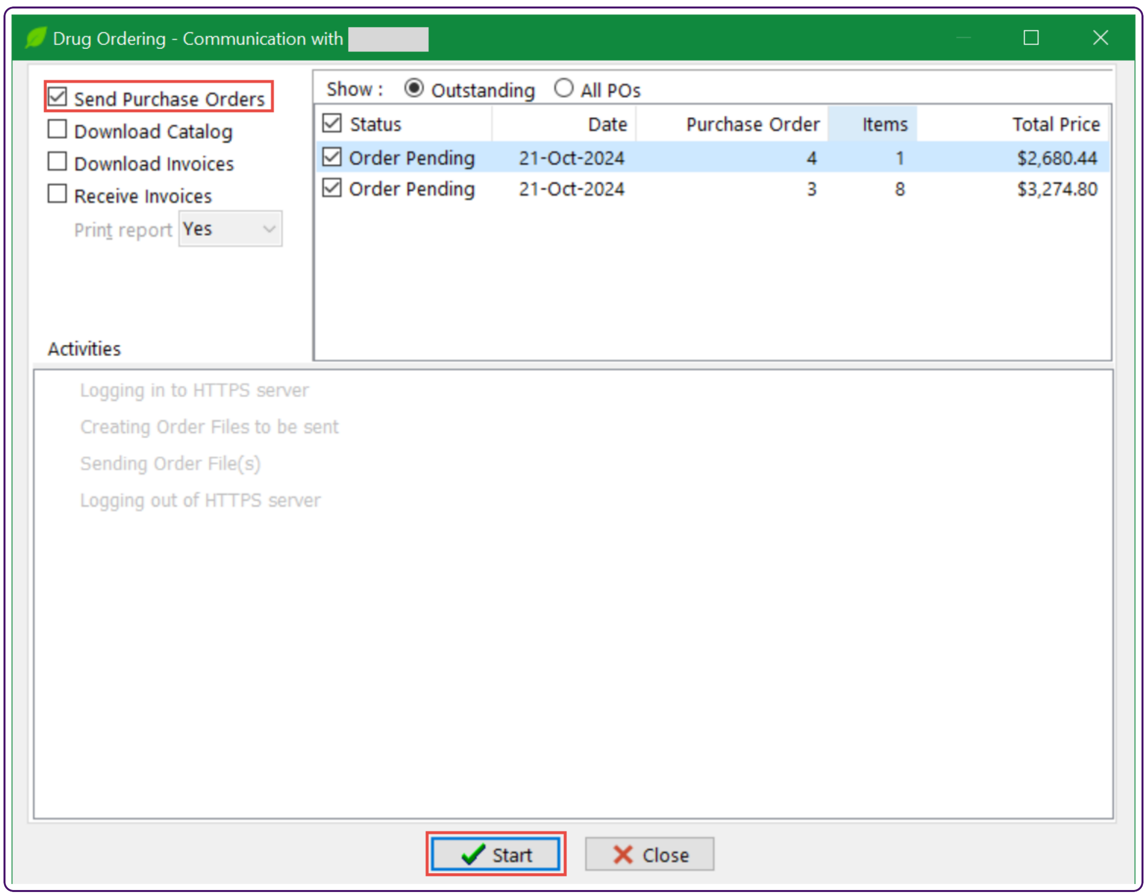
   

4. Select **Yes**.

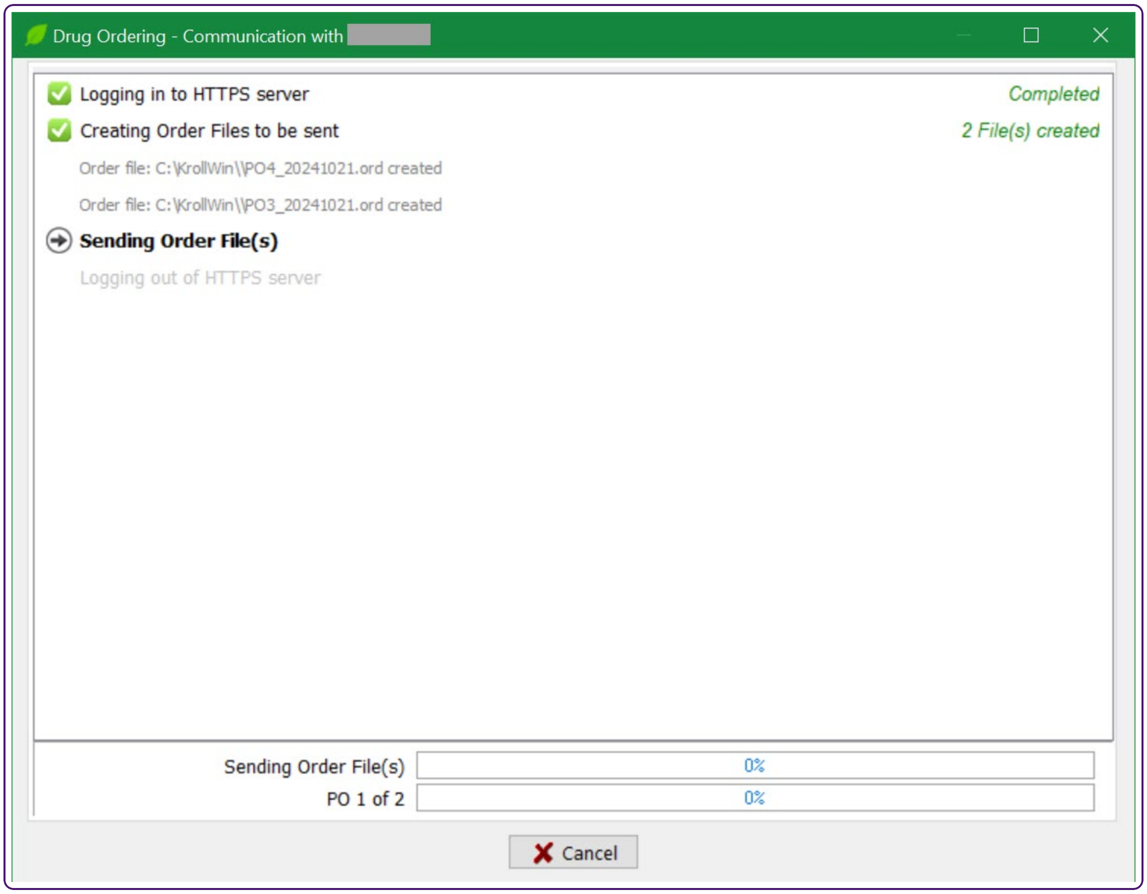
   If you select **No**, the order is saved as pending. To send it later, select it from **Utilities** > **Drug Ordering** > **Communication with** > **[Vendor name]**.

   The selected vendor's **Drug Ordering** window is displayed.

5. Select **Start** or press Enter from **Drug Ordering** > **Communication with** > [**Vendor name**]. This will begin the process of sending the PO to the vendor.

6. As the purchase order is being sent to the vendor, the **Activities** portion of the window will begin to populate with the status of actions being taken.



7. When the order has been transmitted successfully, click **Finish** or press Enter to close the communication window.

Resending and ordering

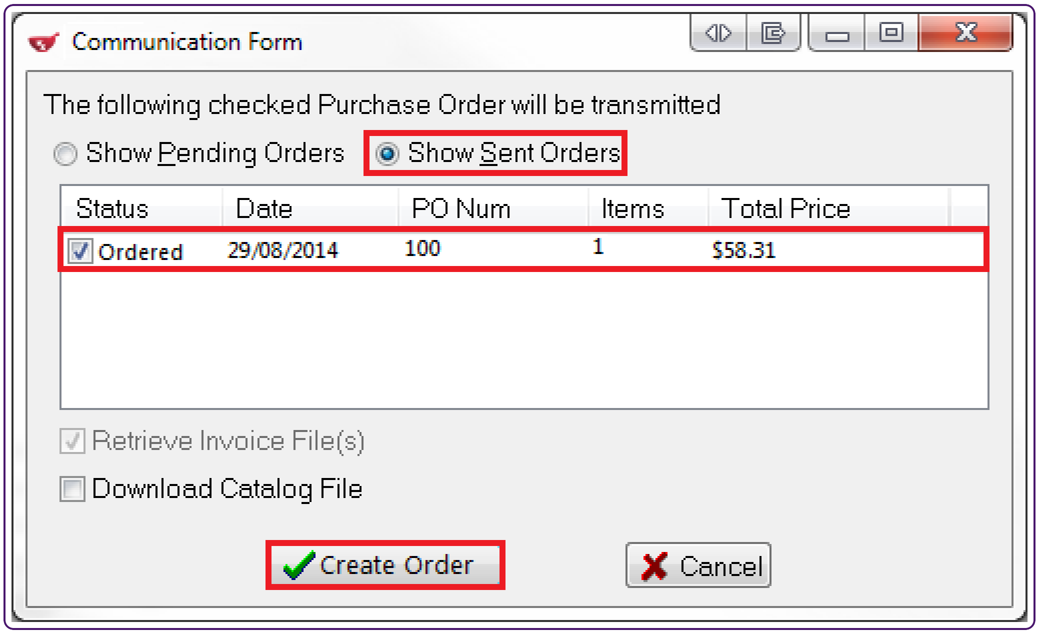
You may need to resend an order if it is not transmitted on the first try.

1. From the **Alt-X Start** window, select **Utilities** > **Drug Ordering** > **Communicate With** > [**Vendor**] > **Recreate Purchase Order**.

   The communication form for the selected vendor is displayed.

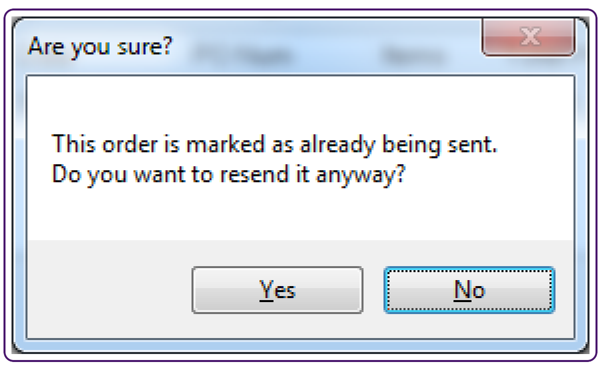
2. Select **Show Sent Orders**.
3. Select the order that needs to be re-sent.

4. Select **Create Order** or press Enter.

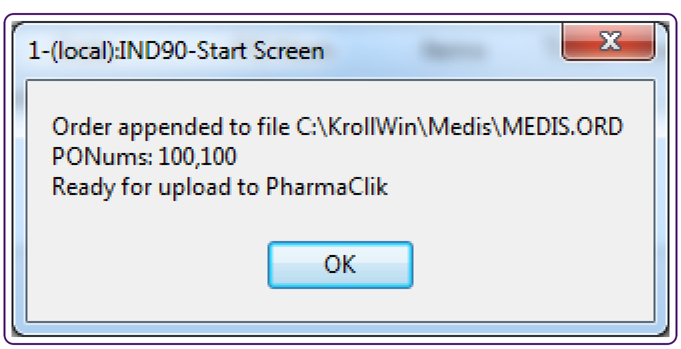


If an existing order is still waiting to be sent, you are asked whether you want to append your order to the existing order, or replace it.

You are then prompted to confirm re-sending the order. Select **Yes** or Press Y.



The new order file details are displayed.



Each vendor has a unique naming convention for invoice files.

Receiving a drug order

Once the pharmacy physically receives their drug order from the wholesaler, the order must be received into Kroll so that the **On Hand** and **Pricing** values are updated. An order can be received electronically (i.e. based on the vendor's invoice download) or manually (i.e., based on the purchase order you generated).

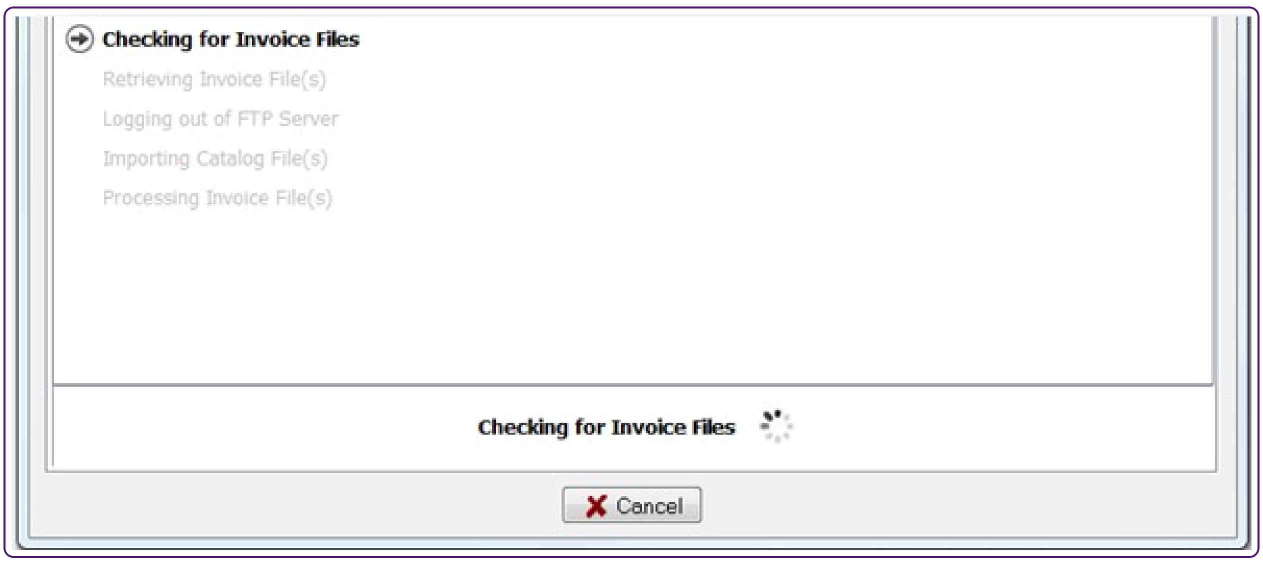
The process of retrieving invoice files consists of three tasks:

1. Checking for invoice files
2. Retrieving invoice files
3. Processing invoice files

   This last task is executed after logging out of the vendor's server.

Checking for invoice files

The information panel shows the **Checking for Invoice File(s)** task is in progress.

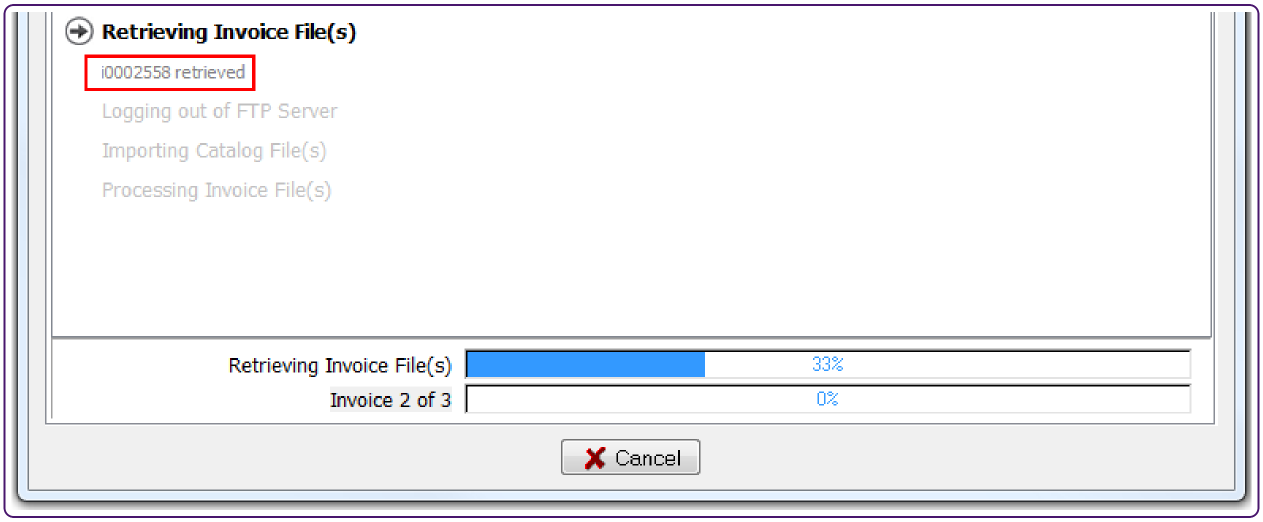


When the **Checking for Invoice File(s)** task is complete, the information panel shows a status of **Completed**, along with the number of invoice files that were found.

If no files were found, the **Retrieving Invoice File(s)** task is skipped since there are no files to retrieve. Later, the **Processing Invoice File(s)** task is skipped as well.

Retrieving invoice files

If invoice files are found during the **Checking for Invoice File(s)** task, the **Retrieving Invoice File(s)** activity is automatically initiated. As soon as each file is retrieved, the information panel shows the corresponding filename. You can follow the progress of each file being retrieved on the top progress bar; the bottom progress bar shows the percentage of invoices that has been retrieved.

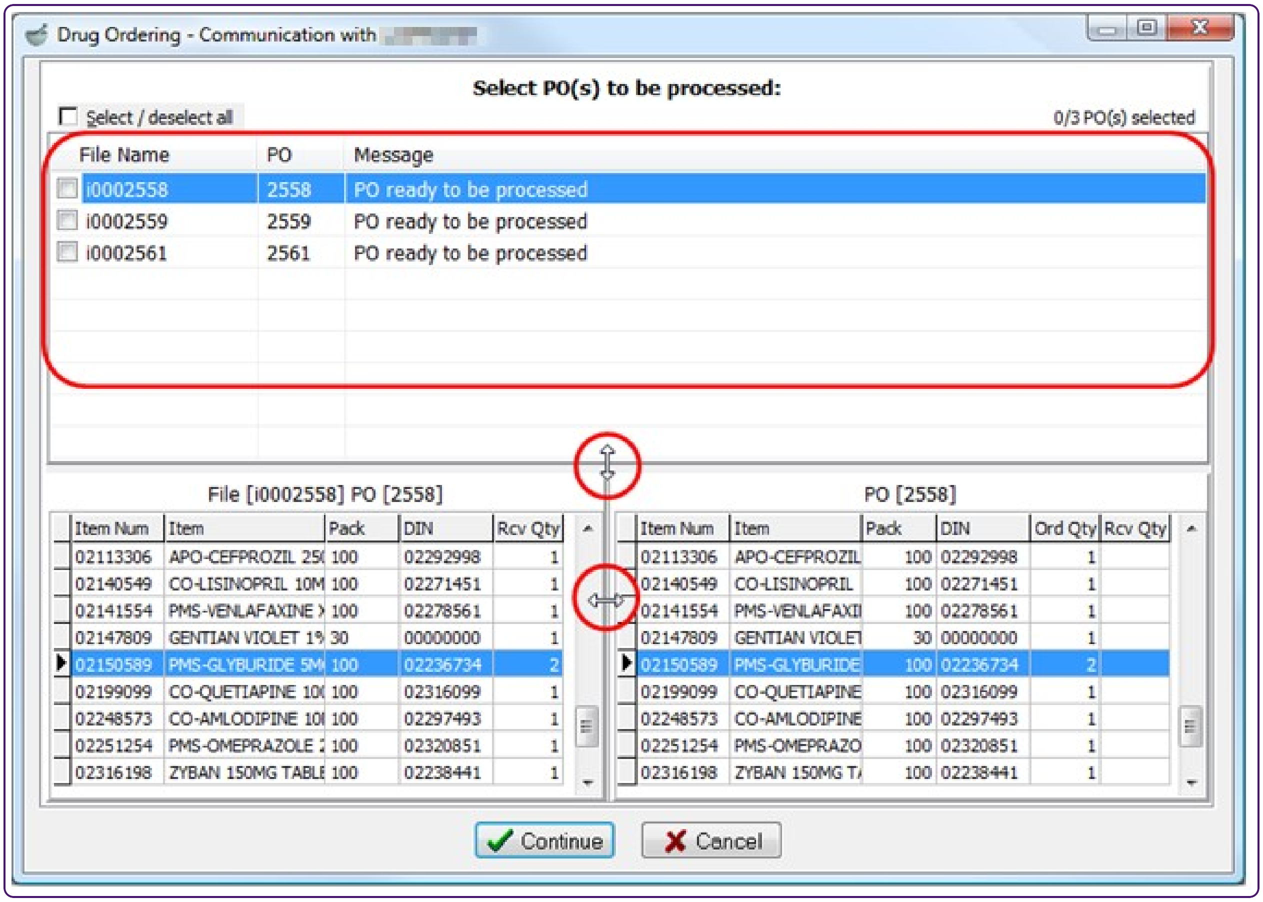


The invoice files are temporarily saved in the designated vendor directory, until they are updated in Kroll.

If an invoice file was retrieved from the vendor's server, but was not processed because you cancelled it, it is picked up in the next communication process.

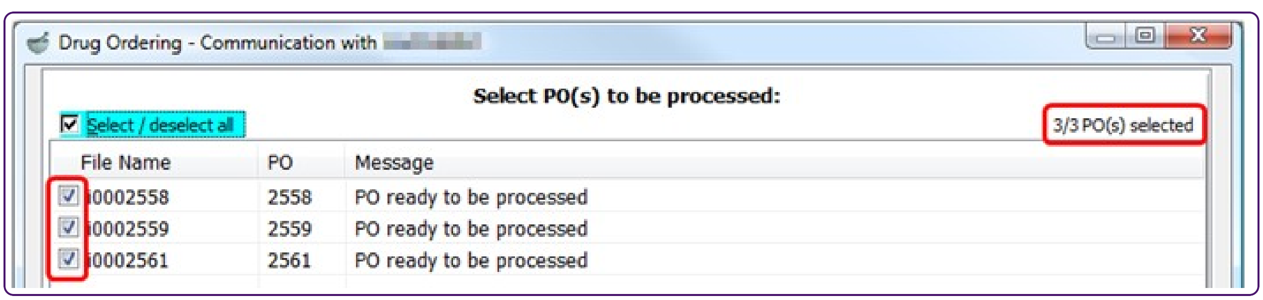
Processing invoice files

If invoice files were found and retrieved, the **Processing Invoice File(s)** activity is automatically initiated. At this point, the communication process tries to match information in the invoice file to a purchase order in Kroll. When the process finds a match between an invoice file and a Kroll PO, a window similar to the following is displayed:

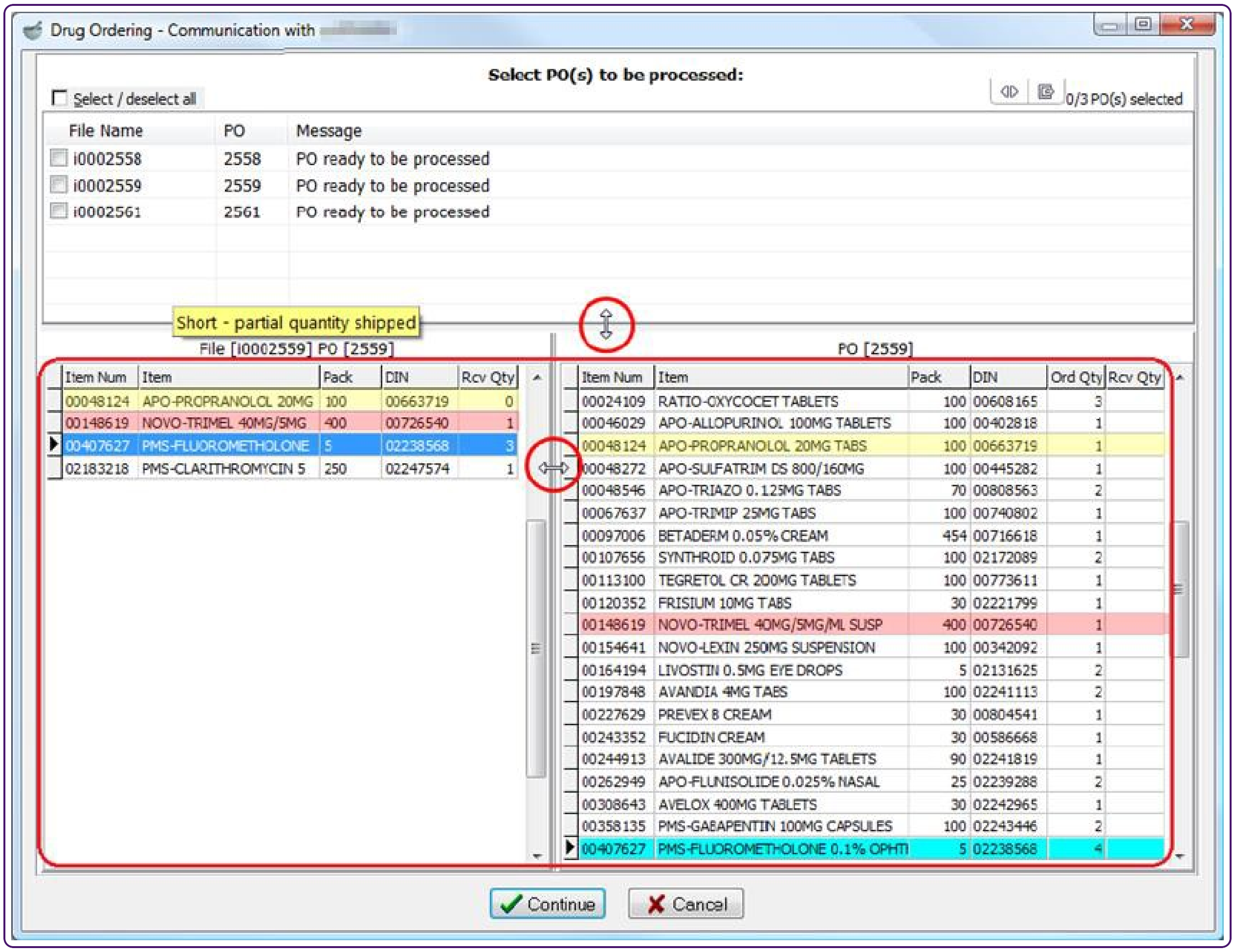


The top panel on this window shows a list of retrieved invoice files with associated PO numbers. Refer to the message to the right of the PO number to help decide which file to process.

Use the checkbox in the upper left hand side of the window to select or deselect all invoice files/POs in the list. The indicator in the upper right hand side identifies the number of PO(s) that have been selected.



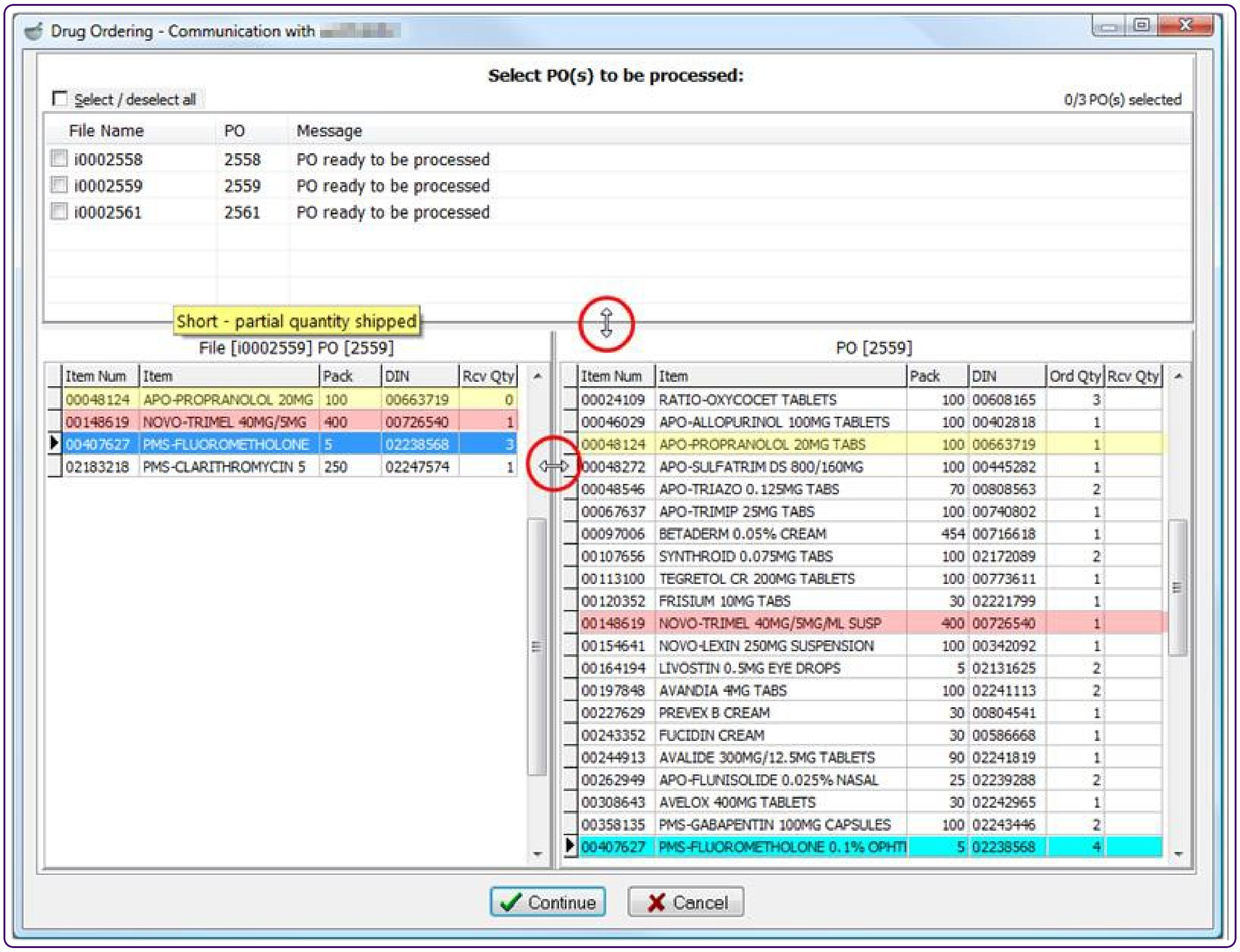
The information in the bottom panel is related to one of the invoice files shown in the top panel. The table on the left displays the information contained in the invoice file. The table on the right displays all the items within a PO in Kroll. You can resize the panels to adjust how much information is displayed.



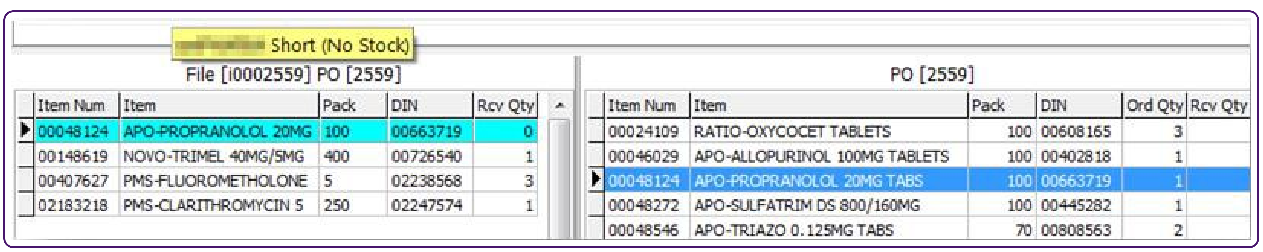
In the above window, the invoice file on the left (i0002559) is associated with PO 2559 on the right. The invoice file contains only four items. The idea is to allow you to compare information inside the invoice file to information in the PO before the file is processed. Selecting any item on either side of the grid highlights the corresponding item on the opposite side, if available.

For example, in the right-hand grid above, item 00148619 (NOVO-TRIMEL 40MG/5ML SUSP), which is highlighted in red, was ordered for one pack (Ord Qty column). Comparing this to the left grid, you can see that the received quantity (Rcv Qty column) is also one pack, which means everything ordered was received.

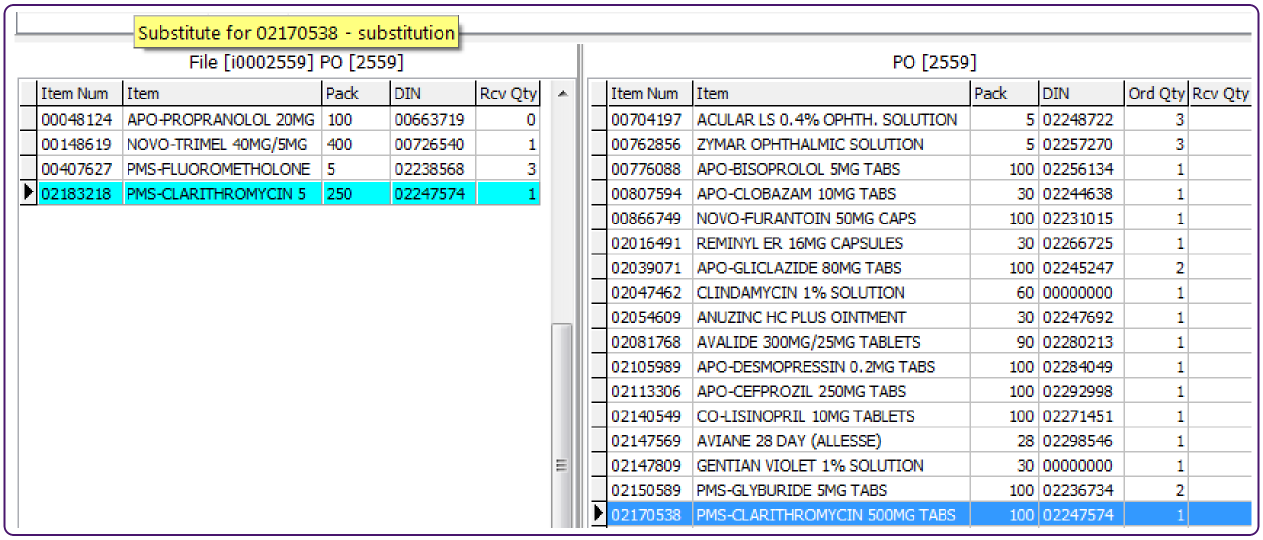
In the right-hand grid below, item 00407627 (PMS-FLUOROMETHOLONE 0.1%), which is highlighted in aqua, was ordered for four packs, but the invoice file indicates that the vendor only sent three packs. A tooltip indicates “Short-Partial quantity shipped”.



In the right-hand grid below, item 000481124 (APO-PROPRANOLOL 20MG), which is highlighted in aqua, is out of stock and nothing was shipped, although the left-hand grid indicates that one pack was ordered. A tooltip indicates “[Vendor name] Short (No Stock)”.



In the right-hand grid below, item 02170538 (PMS-CLARITHROMYCIN 500MG TABS) was ordered, but the invoice file on the left indicates that the vendor sent item 02170530 as a substitution. A tooltip indicates “Substitute for 02170538 – substitution”. The vendor only sends substitutions for customers who provide consent to do so.


Substitute for 02170538 - substitution

File [i0002559] PO [2559]

Item Num	Item	Pack	DIN	Rcv Qty
00048124	APO-PROPRANOLOL 20MG	100	00663719	0
00148619	NOVO-TRIMEL 40MG/5MG	400	00726540	1
00407627	PMS-FLUOROMETHOLONE	5	02238568	3
02183218	PMS-CLARITHROMYCIN 5	250	02247574	1

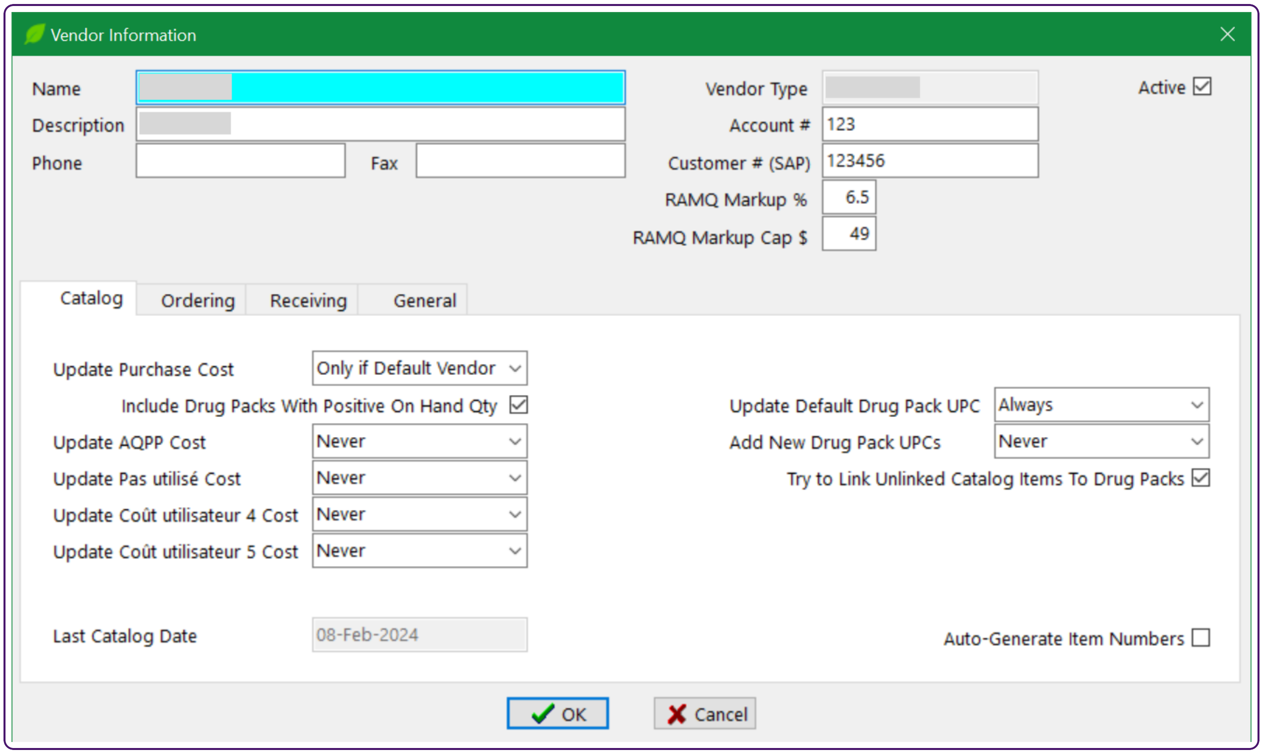
PO [2559]

Item Num	Item	Pack	DIN	Ord Qty	Rcv Qty
00704197	ACULAR LS 0.4% OPHTH. SOLUTION	5	02248722	3	
00762856	ZYMAR OPHTHALMIC SOLUTION	5	02257270	3	
00776088	APO-BISOPROLOL 5MG TABS	100	02256134	1	
00807594	APO-CLOBAZAM 10MG TABS	30	02244638	1	
00866749	NOVO-FURANTOIN 50MG CAPS	100	02231015	1	
02016491	REMINYL ER 16MG CAPSULES	30	02266725	1	
02039071	APO-GLICLAZIDE 80MG TABS	100	02245247	2	
02047462	CLINDAMYCIN 1% SOLUTION	60	00000000	1	
02054609	ANUZINC HC PLUS OINTMENT	30	02247692	1	
02081768	AVALIDE 300MG/25MG TABLETS	90	02280213	1	
02105989	APO-DESMOPRESSIN 0.2MG TABS	100	02284049	1	
02113306	APO-CEFPROZIL 250MG TABS	100	02292998	1	
02140549	CO-LISINOPRIL 10MG TABLETS	100	02271451	1	
02147569	AVIANE 28 DAY (ALLESSE)	28	02298546	1	
02147809	GENTIAN VIOLET 1% SOLUTION	30	00000000	1	
02150589	PMS-GLYBURIDE 5MG TABS	100	02236734	2	
02170538	PMS-CLARITHROMYCIN 500MG TABS	100	02247574	1	

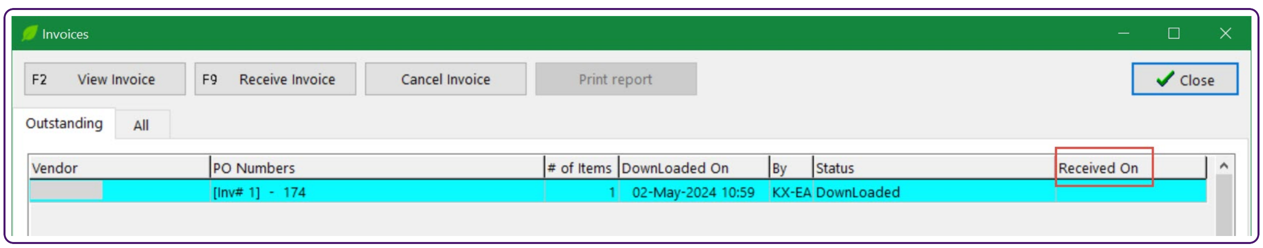
When the **Processing Invoice File(s)** task does not find a matching PO in Kroll, you must decide what to do with the PO. The following table describes the options you can choose:

Name	Description
Treat as no stock received	The invoice file is received, taking into consideration that no equivalent PO exists in Kroll. On-hand quantities are not updated; catalog prices are updated as necessary. Select this option if an order was placed outside of Kroll for items for without inventory and prices that are monitored in Kroll (e.g. OTC items).
Treat like non-PO receive	The invoice file is received, taking into consideration that no equivalent PO exists in Kroll. On-hand quantity and prices for associated drug packs, if available, are updated. Select this option if an order was placed outside of the Kroll application for items with inventory and prices that are monitored in Kroll (e.g., Rx order sent directly from the vendor’s website).
Skip this PO	The invoice file is not processed. It remains outstanding.

To set a default action for this option, go to **Utilities** > **Drug Ordering** > **Edit Vendor List** > **[Vendor name]** > **Receiving** and select the appropriate option from the **Default Action when PO not found** dropdown list.



If you do not select an invoice file/PO equivalent, the invoice sits in **Utilities** > **Drug Ordering** > **Electronic Invoice Receiving** with no **Received On** date.

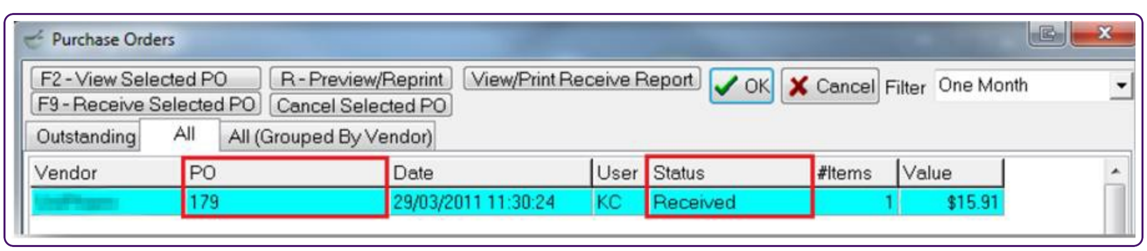


Processing an invoice

1. Update the purchase order information in Kroll.

   In this step, the purchase order status is set to "Received" or "Partially Received".

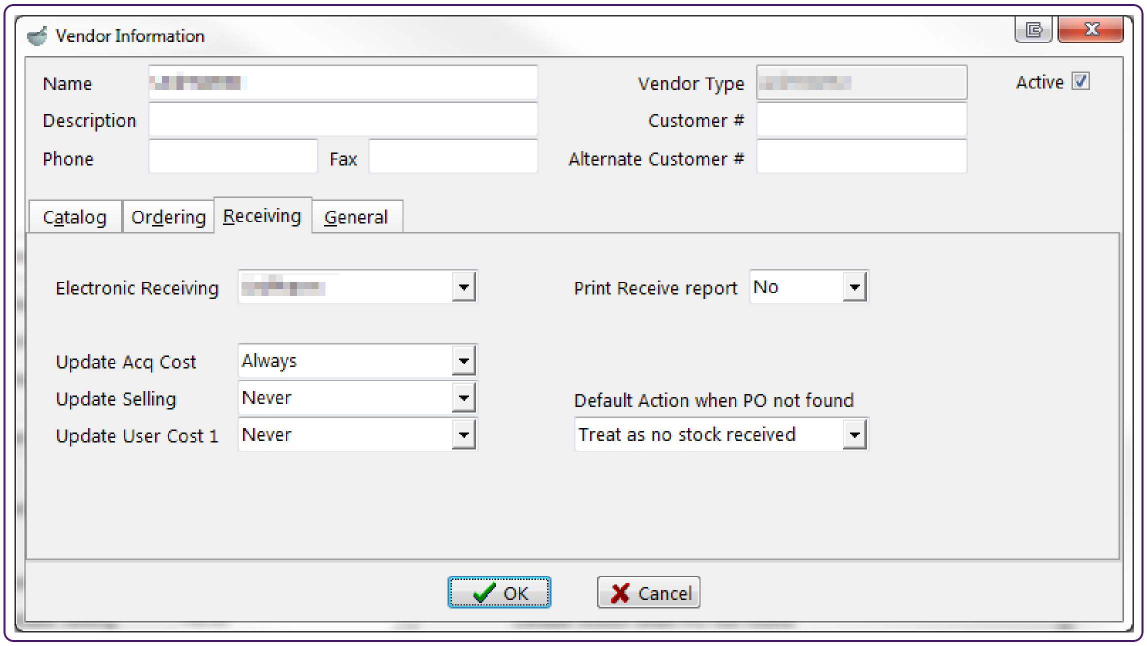
   This step is not executed when the file or PO is configured to be treated like a non-PO receive, or a no stock received.

2. Update the drug pack prices.

   In this step, the system looks at the **Receiving** settings set in **Utilities** > **Drug Ordering** > **Edit Vendor List** > [**Vendor name**] > **Receiving** to determine if and where drug pack prices are updated.

   This step is not executed when the file/PO is configured to be treated as “no stock received”.



3. Adjust the drug pack inventory.

   In this step, the on-hand quantity of a drug pack is adjusted if the following settings are in place:

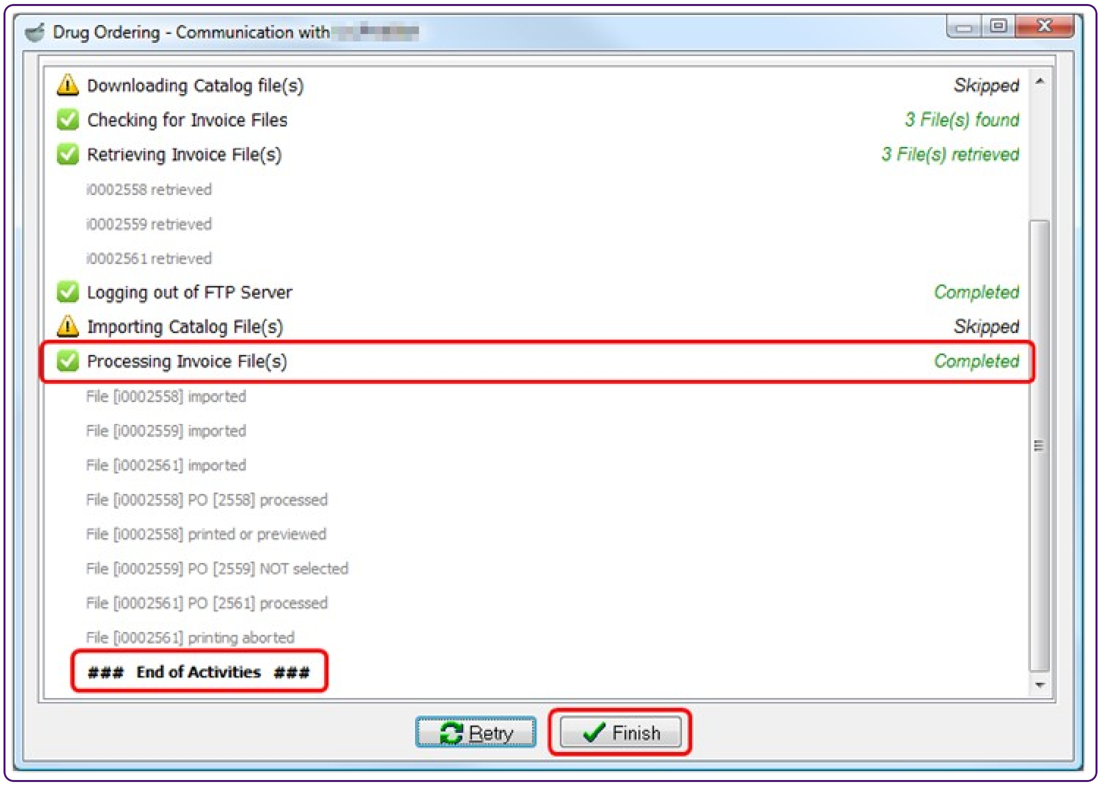
   - **Perform Inventory Adjustment** in **File** > **Configuration** > **Store** > **Order** must be turned on.
   - **No Inventory Adjustment** in the **Drug** > **Ordering** tab must be deselected. This step is not executed when the file/PO is configured to be treated as “no stock received”.

4. Update the catalog prices.

   In this step, the system looks at the **Catalog File Loading** rules set in **Utilities** > **Drug Ordering** > **Edit Vendor List** > **[Vendor name]** to determine if and where drug pack prices are updated via the catalog.

   When the **Processing Invoice File(s)** task is complete, the status shows as **Completed** and the information panel displays the message “**### End of Activities ###**”. Two new buttons, **Retry** and **Finish**, are displayed at the bottom of the communication window to indicate that communication has finished.

5. Do one of the following:
   - Select **Finish** or press Enter to close the communication window.
   - Select **Retry** or press CTRL+R to start another communication with the vendor.



Chapter 16

New Rxs

The prescription filling process is a well-defined series of steps that pharmacy users carry out to produce prescriptions for their patients. Kroll is designed to work with the established prescription filling process to provide the safest, most efficient, and reliable prescription services to patients. The steps for filling vary according to the workflow you implemented. In this document, the process

- Drop-Off
- Data Entry
- Packaging
- Pharmacist Verification
- Pickup

If at any point during the workflow, you do not want to finalize a step, you can select one of the following buttons:

- **Save for Later**: the **F9 - Workflow** window is displayed.
- **Cancel Rx**: the prescription is reversed, and marked as Cancelled in the patient profile. Cancelled Rxs can be filled later.
- **Reject**: the Rx is rejected and the application returns to the previous stage while still maintaining the work order priority sequence.
- **Trouble**: the Rx is removed from the work order priority queue.

Drop-off

The following steps must be performed at the drop-off stage to ensure patient safety and to proceed to the next Rx processing stage in the system:

1. Search for and select a patient record
2. Review the patient's medication history
3. Indicate a prescription due time (i.e., pick up time),

4. Select a status for the prescription (i.e., Fill, Unfill, Not Disp, Stock Transfer)
5. Scan the written prescription into the system
6. Indicate the number of drugs on the written prescription

Pharmacy assistants, pharmacy technicians, and pharmacists can drop-off prescriptions into the system as follows:

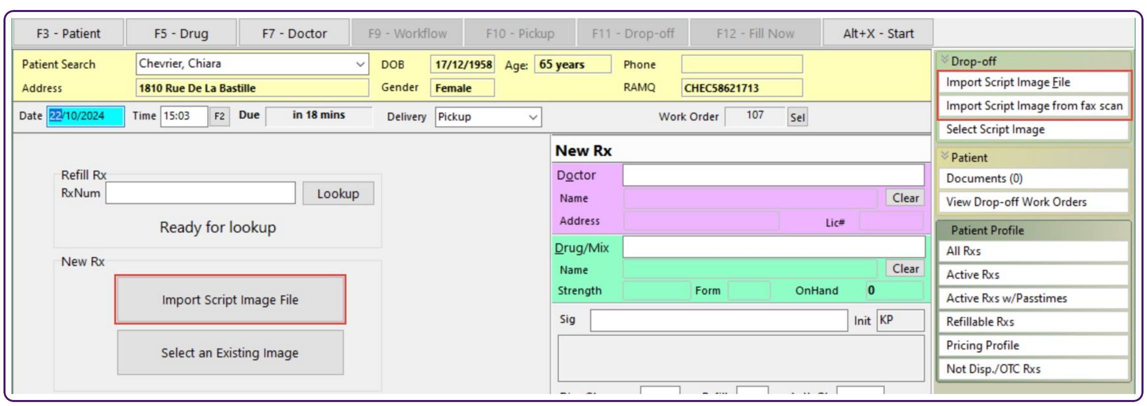
1. From the **ALT+X Start** window, select **F11 - Drop-Off** or press F11.
2. Search for and select the applicable patient record (see Searching for a Patient from the F11-Drop Off window).
3. Select a wait time from the **Priority** field.

   To enter a custom wait time, select **F2**, then enter a custom **Date** and **Time**.

   The **Delivery** field defaults to Pickup.
4. After an Rx barcode sticker has been attached to the written prescription, feed it into the document scanner and select **Import Script Image File** or **Select Script Image**. If the prescription was faxed to the pharmacy, select **Import Script Image from fax scan** to select and attach a faxed image to the work order.

   If you are unable to scan the script image into the system, you can instead enter a **Drug/Mix**, **Doctor**, **Dispense Quantity**, **Days Supply**, and **Sig**.

5. After the image has been scanned into the system, you can use the following tools to adjust it: Crop, Flip, Rotate, and Fit to Window.
6. Select **Save** or press Enter to insert the image into the Drop-off window.

7. Enter the number of medications on the written prescription in the **# of Rxs On Page** field.

   This tells the system how many Rxs are associated with the Rx image.

8. To **Clear** (i.e. delete) or **Re-Scan** a script image, select **Clear Script Image** from the right navigation pane.

   This removes the existing image and allows you to re-scan the old image or scan a new image.

9. Select an **Rx Status**:
   - Fill: Process and dispense the Rx
   - Unfill: Put the Rx on hold
   - Not Disp: Mark the Rx as OTC to Profile
   - Stock Transfer: Mark the Rx as a stock transfer to another pharmacy

10. Optionally enter workflow-specific notes in the **Note** tab near the bottom of the window.

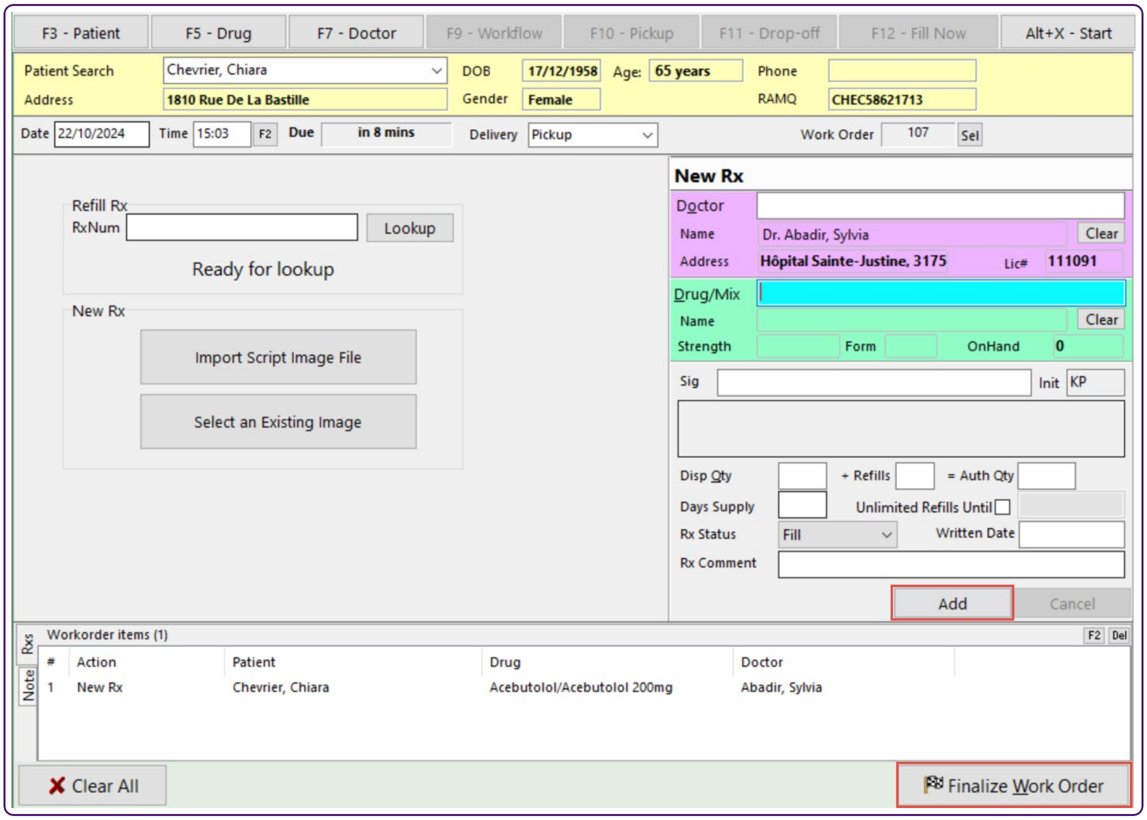
    These notes are displayed at each Rx filling stage for the prescription.

11. Select **Add** to create the work order.

    The Rx is displayed in the **Workorder items** pane.

12. Repeat steps 10-11 for each Rx you want to add to the work order for that patient.

13. When you have added all the Rxs, select **Finalize Work Order**.



A blank **F11-Drop-Off** window is displayed.

Tracking a work order after drop-off

Once a work order for a new Rx has been dropped off, it proceeds to the enter stage. You can access the enter queue from the **F9-Workflow** window.

- To access the **F9-Workflow** window from the **ALT+X-Start** window, select **F9-Workflow** or press F9.

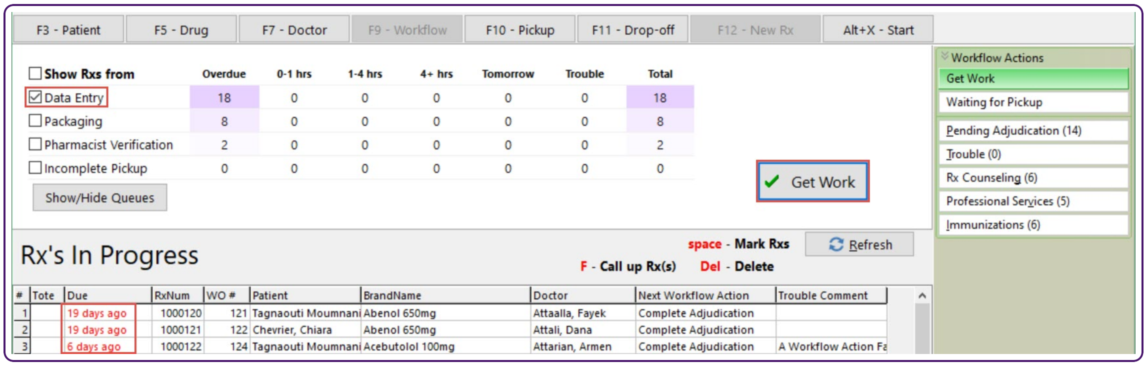
  The dropped order appears in the enter queue in the applicable due-time column. The list of **Rxs in Progress** on the lower half of the window shows which orders are coming up next in the selected queue. The entries on the lower half of the window are for information purposes only; you cannot change the work order due time.

Data Entry

During the Data Entry stage, you enter prescription information such as Drug, SIG, Dispense quantity and intervention codes into the system for processing. Extra care should be taken at this point to ensure the work order passes through the **Check** quickly without having to make time-consuming changes later on. Typically, the enter stage is completed by a pharmacy assistant, but it can also be completed by licensed technicians and pharmacists.

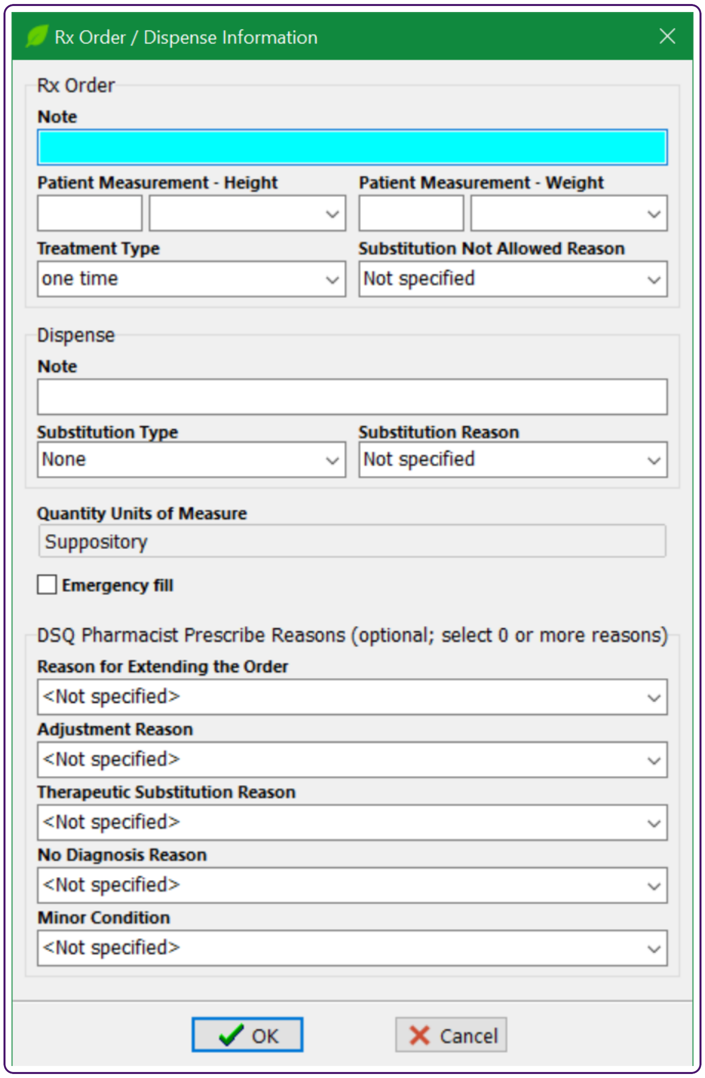
1. From the **Alt-X Start** window, select **F9 - Workflow**.
2. Select **Data Entry** to display the data entry queue.
3. Select **Get Work** to view the work orders that need to be input.

   Work orders are always presented to you in priority sequence according to the due time assigned to the work order.



4. Select **Get Work** to view the next work order that needs to be entered, or double click a specific row to select that prescription.

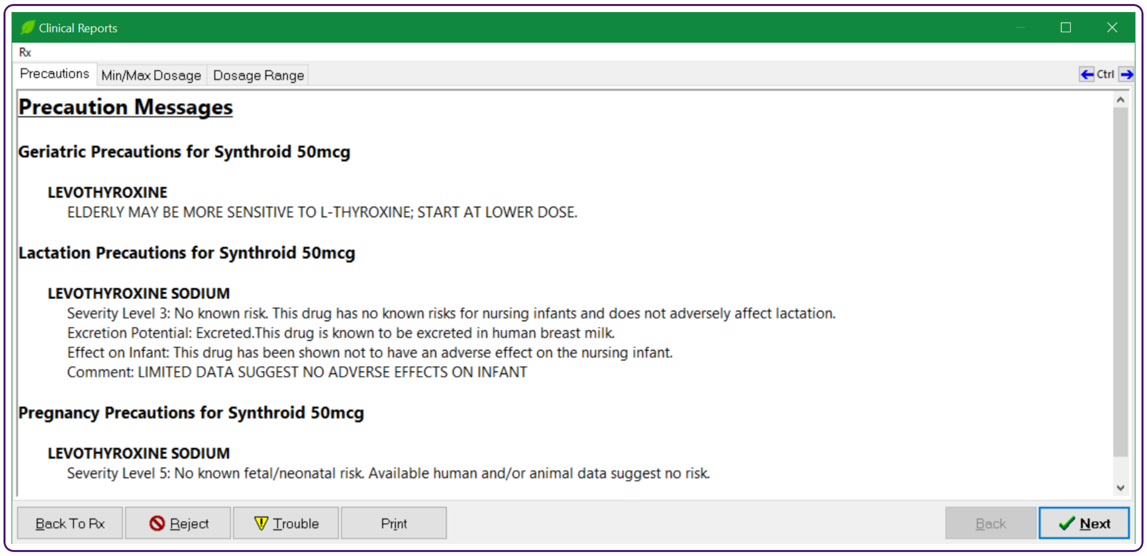
   The **Rx Order** window is displayed.



5. Complete this form as needed, then select **OK**.

   Make any necessary changes to the fields on the main window, then select **F12 - Save Changes**.

   The **Clinical Reports** window is displayed.



6. Review the information on the tabs.

   You can select a tab to display it, or use the **Next** and **Back** buttons to navigate between them.

7. If there is a reason you should not fill the Rx at all or at this time, select **Reject** or **Trouble** respectively, otherwise proceed to the next step.

8. Select **Finished**.

   The **Rx Order** window is displayed again.

9. Review it and select **OK**.

10. Select **F12 - Fill Rx**.

    A confirmation message is displayed indicating that the Create Rx Order was successful.

11. Select **OK**.

    A confirmation message is displayed indicating that the Dispense Rx was successful.

12. Select **OK**.

    You are prompted to print the applicable dispensary label.

    The Rx you worked on is now ready for packaging.

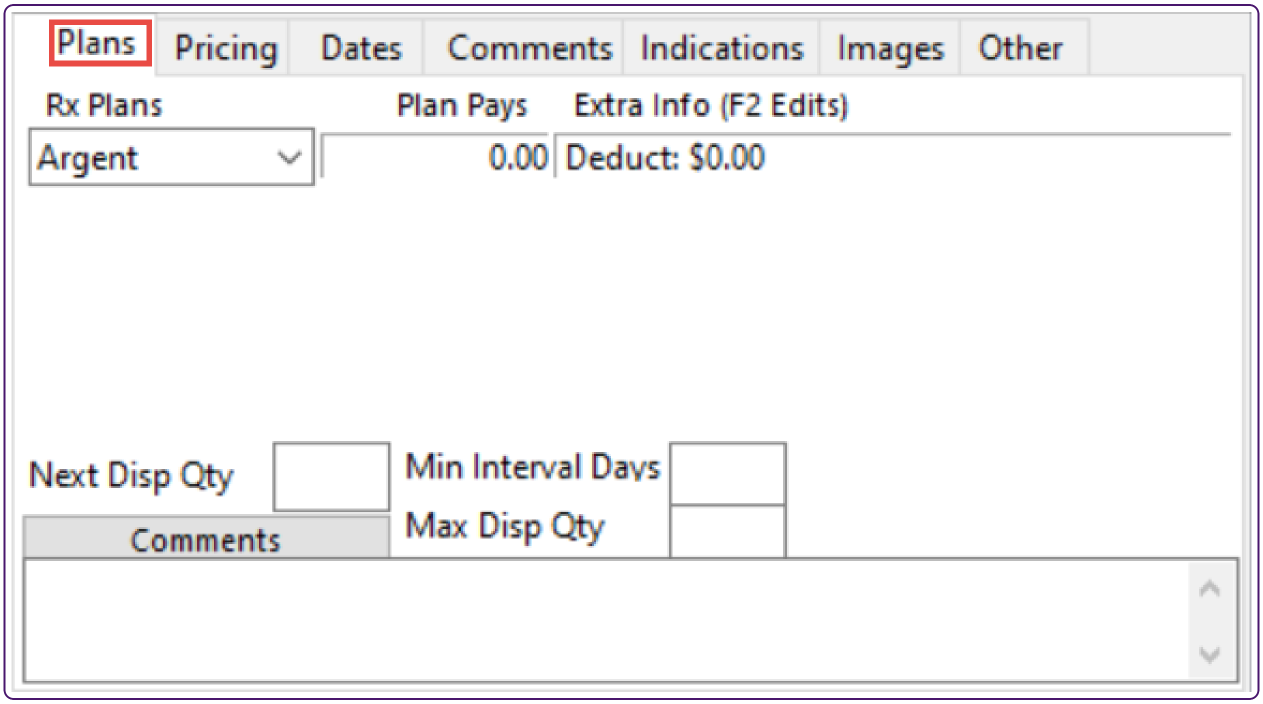
    If you are not ready to package it, and you return to the **F9 - Workflow** window, the Rx is now in the **Packaging** queue.

F12 window tabs

The following sections describe the tabs at the bottom of the F12 window.

Plans

You can use this tab to exclude third party plans from the prescription, or change the sequence in which the plans are billed. Plans are billed in the sequence they are listed.



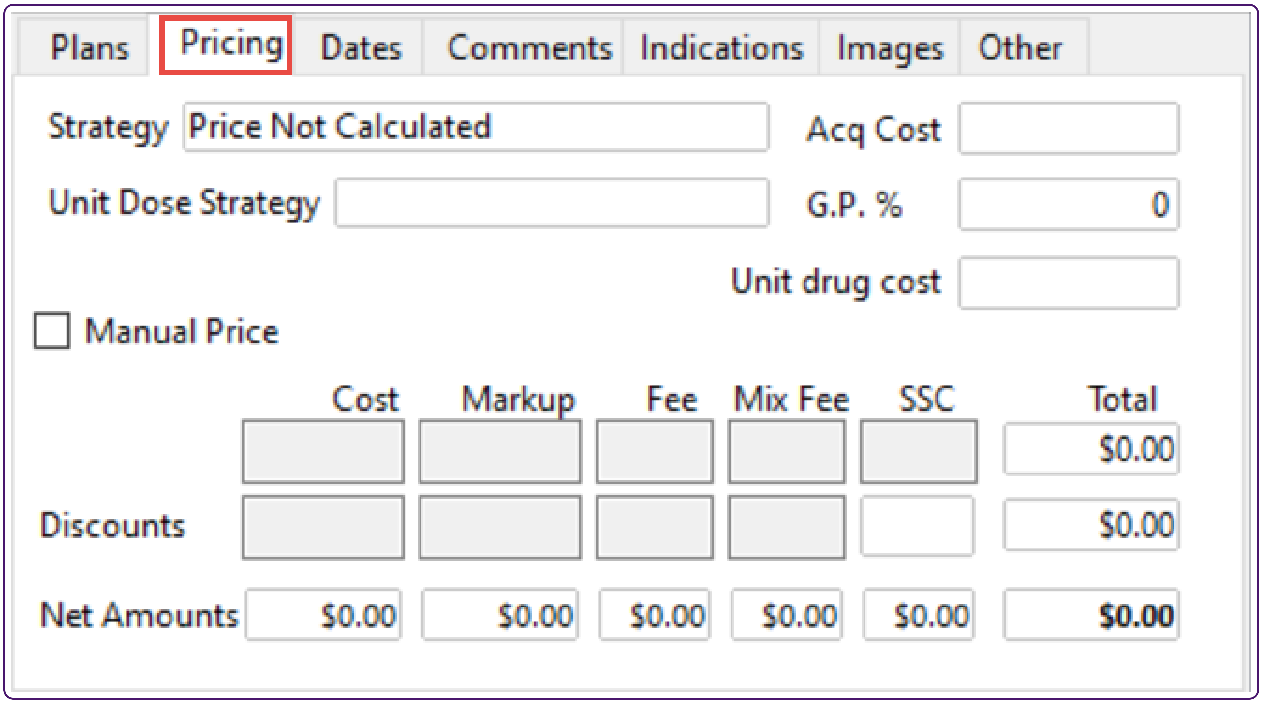
The following table describes the fields on this tab.

Name	Description
Next Disp Qty	The new **Dispense Quantity** for the next refill. This is especially useful for trial prescriptions wherein the first order has a lower dispensing quantity than the next.
Min Interval Days	This is used for narcotic prescriptions to prevent refilling until a specified number of days have elapsed.
Max Disp Qty	The maximum quantity that can be handed out at each dispense.
Comments	Any comments specific to the prescription.

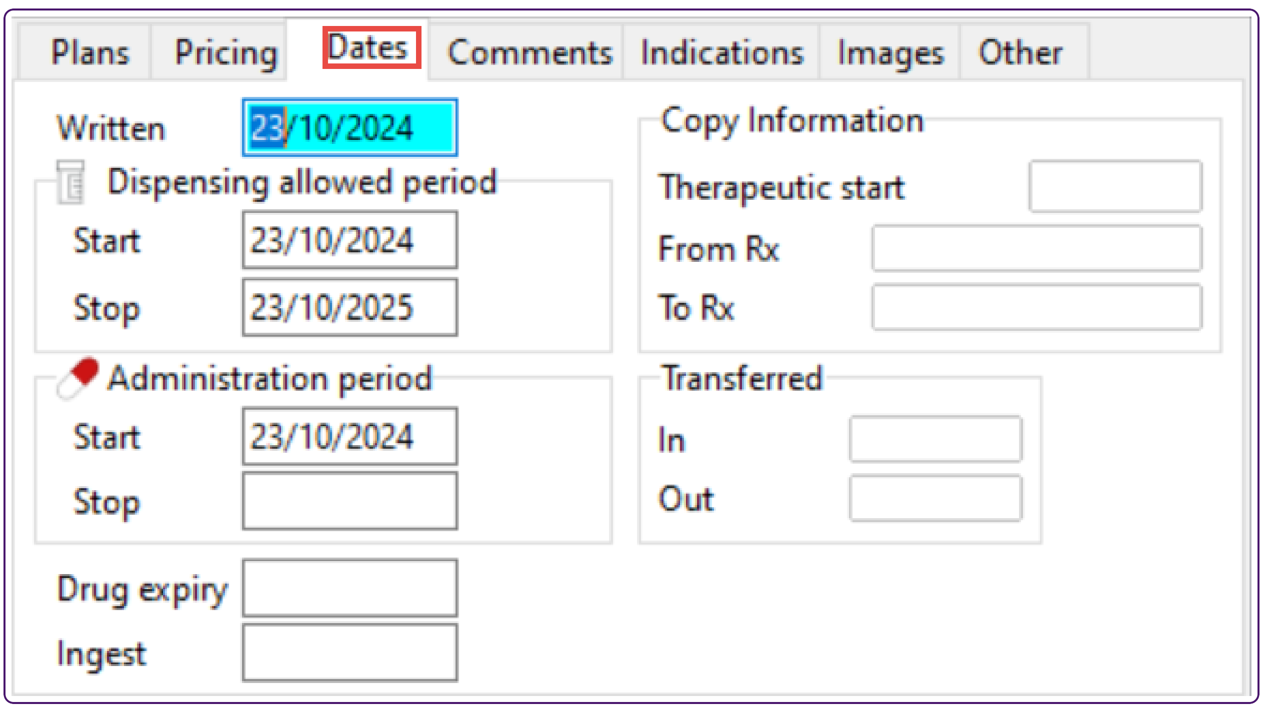
Pricing

The **Pricing** tab displays information about the pricing strategy used to calculate the Rx. Pricing strategies are set by the home office and cannot be modified; however, if a price needs to be overridden, you can select the **Manual Price** checkbox to enable the **Cost**, **Markup**, **Fee**, **Mix Fee**, and **SSC** fields, and then adjust their values.

Manual pricing should only be used in emergency situations. Please report incorrectly priced prescriptions to the Pharmacy Support Helpdesk for resolution.



Dates

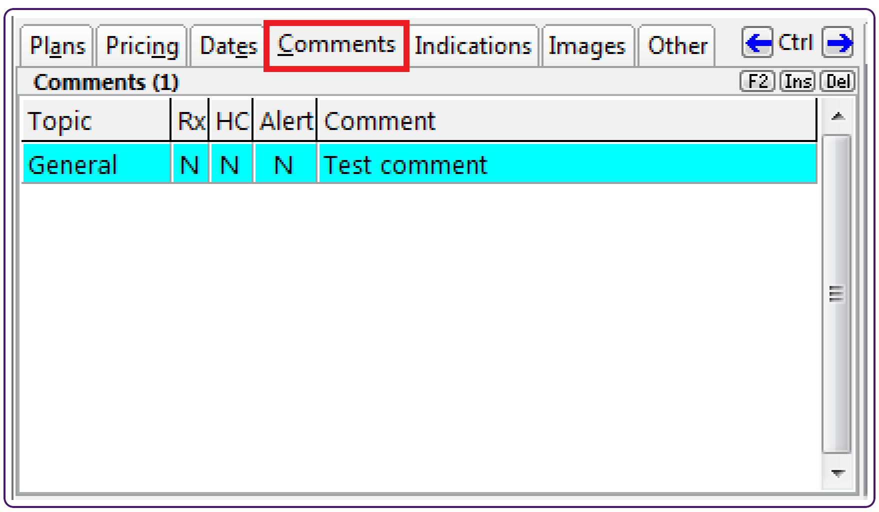


The following table describes the fields on this tab.

Name	Description
Written	This is automatically populated with the date the Rx was processed, but can be replaced with the date the prescription was written.
Dispensing allowed period	The period during which the drug can be dispensed.
Administration period	The period during which the drug can be administered.
Drug expiry	The drug expiry date for the prescription, which is printed on the vial label. This option is especially useful for liquid antibiotics.
Ingest	The ingest date for methadone prescriptions.
Copy Information	
Therapeutic start	The period during which the therapy is applied.
Transferred In or **Out**	The date the prescription was transferred in or out.

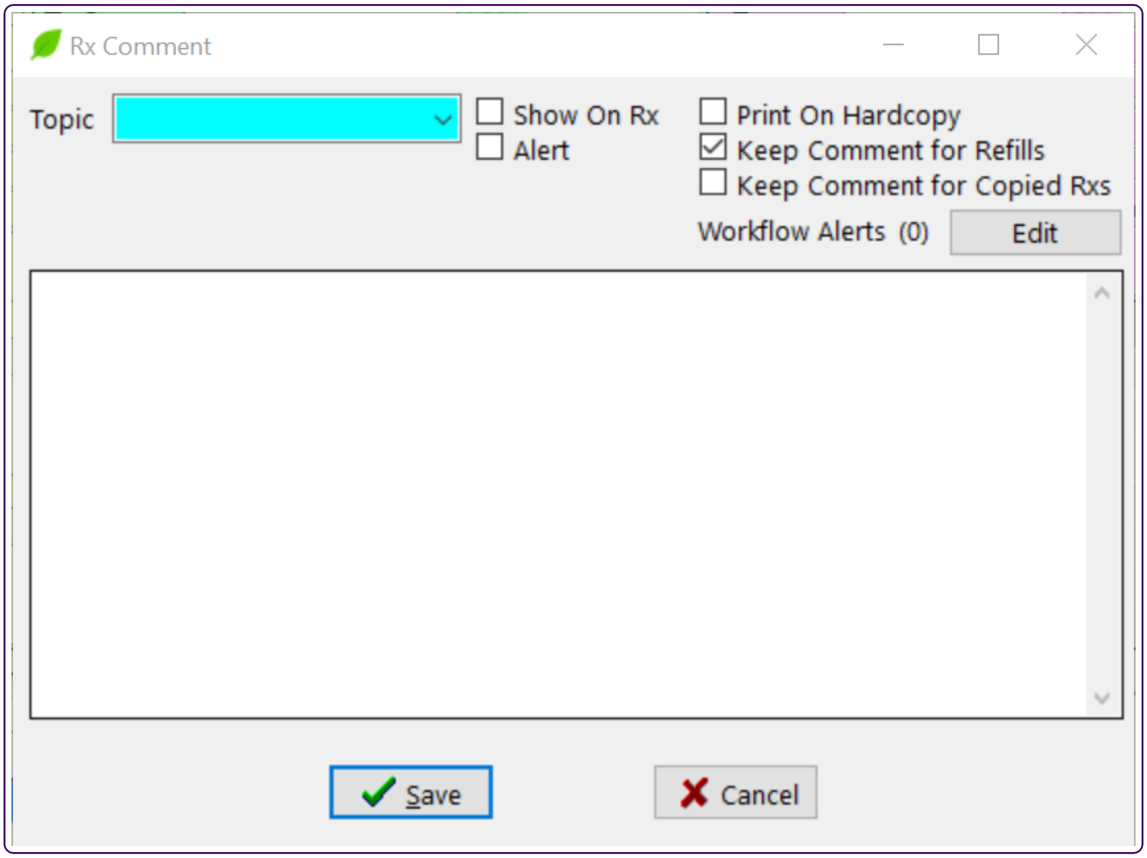
Comments

You can add comments and notes from the **Plans** and **Comments** tabs. From the **Comments** tab, you can select additional attributes that are not available on the **Plans** tab.



1. To insert a new comment, select **Ins** or press Insert, then select **Comment**.

   The **RX Comment** pop-up is displayed.



2. Select a **Topic** and enter your comment.
3. To show the comment when filling a prescription, select **Show On Rx**.
4. To show a pop-up message during filling that indicates a comment is present, select **Alert**.
5. To include the comment on the hard copy prints during filling, select **Print On Hardcopy**

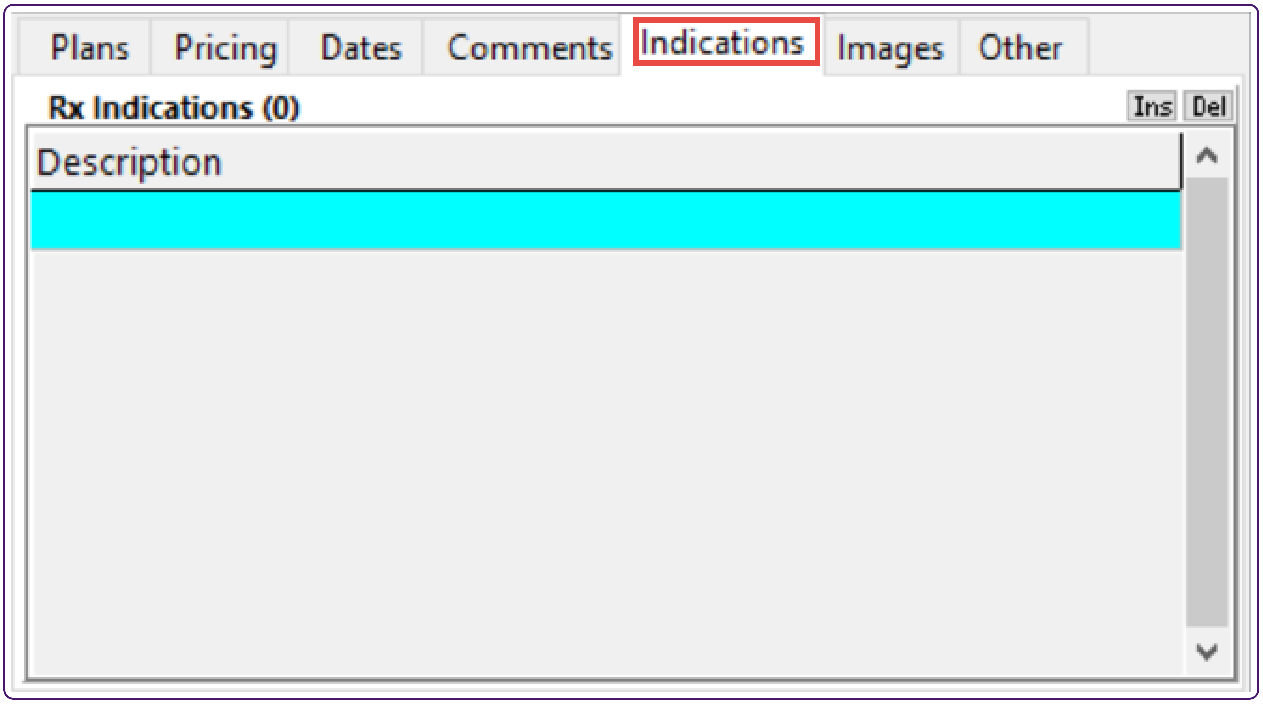
   This checkbox can only be selected for one comment, as there is limited space on the hardcopy.
6. To include the comment on any refills for this prescription, select **Keep Comment for Refills**.
7. To copy the comment to a new prescription, if the original prescription is copied, select **Keep Comment for Copied Rxs**.
8. To display a comment during one or more steps in the workflow, select the **Edit** button adjacent to **Workflow Alerts**, then select one or more workflow steps and select **OK**.
9. To choose which workflow the comment is applied to, select **Edit**, the select the applicable workflow.

> If you select more than one workflow, it will only be displayed on the first workflow unless you escape out of the Rx and return to it for the next workflow.

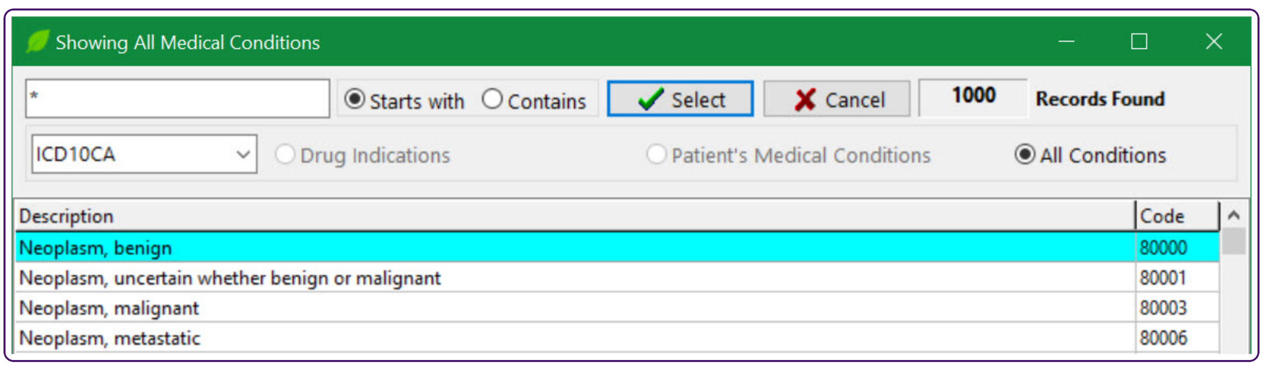
10. Select **Save**.

Indications

The **Indications** tab allows you to identify which condition the prescription is treating.



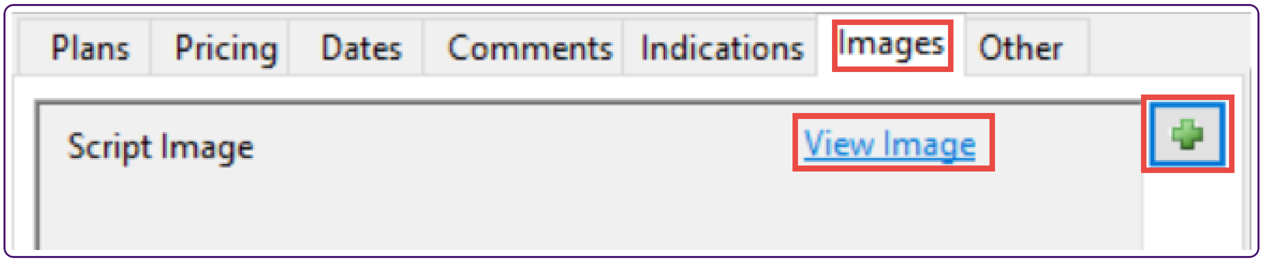
When you select **Ins** or press Insert, a list of ICD- 10-CA and/or FDB conditions is displayed.



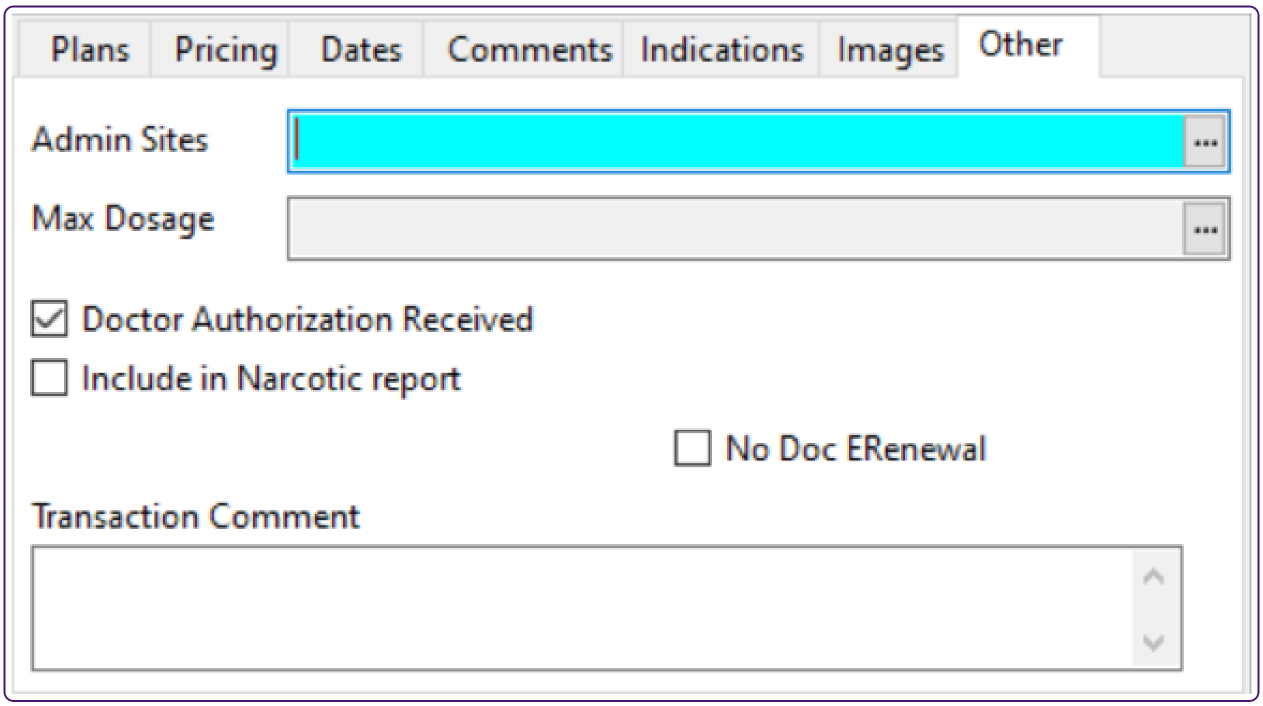
Highlight the indication you want to apply to the prescription and click **Select**.

Images

Select the **Images** tab to display the script image that was scanned during drop-off. Select **View Image** to view the scanned image and + to add a new image.



Other



The following table describes the fields on this tab.

Name	Description
Admin Sites	The area on the patient's body that the drug is administered.
Max Dosage	The max dosage of drug that can be administered per time measurement, such as hour or day. You can enter two max dosages.
Doctor Authorization Received	This should always be selected, as it indicates that prescriber authorization to dispense the prescription has been received.
Include in Narcotic report	Select to include the Rx in the narcotic report even if it is not a narcotic prescription.

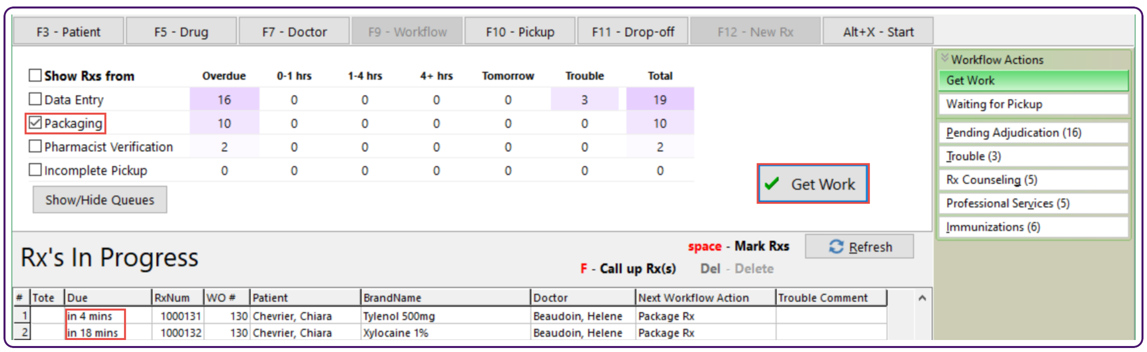
Name	Description
No Doc ERenewal	If selected, doctor eRenewal is prohibited,
Transaction Comment	Displays any comments specific to the transaction. This can be a user comment, system comment, or a comment transferred from the To Do comment section. This comment will not be transferred to refills or copied Rxs.

Packaging

During the packaging stage, you prepare the Rx packs.

1. From the **Alt-X Start** window, select **F9 - Workflow**.
2. Select **Packaging**.
3. Select **Get Work** to view the next work order that needs to be packaged, or double click a specific row to select that prescription.

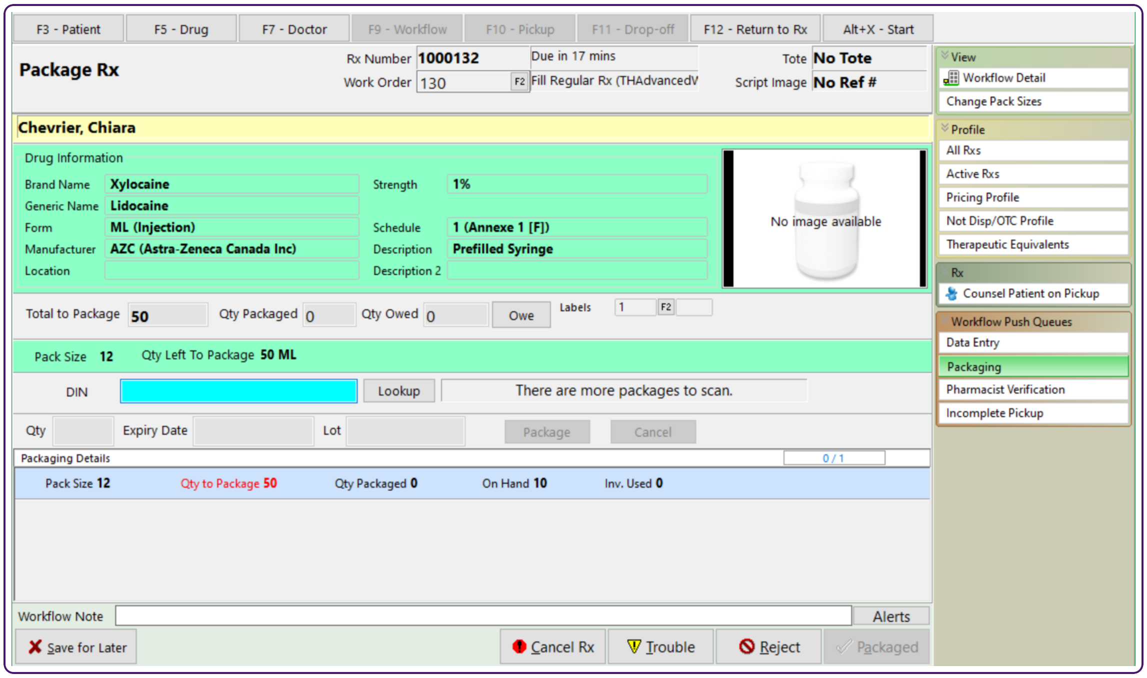
   Work orders are always presented to you in priority sequence according to the due time assigned to the work order.



4. Double-click the Rx you want to package.

   If the patient has other Rxs available to package, you are asked whether you want to call them up as well. If you select **Yes**, you will be prompted to package all of the Rxs.

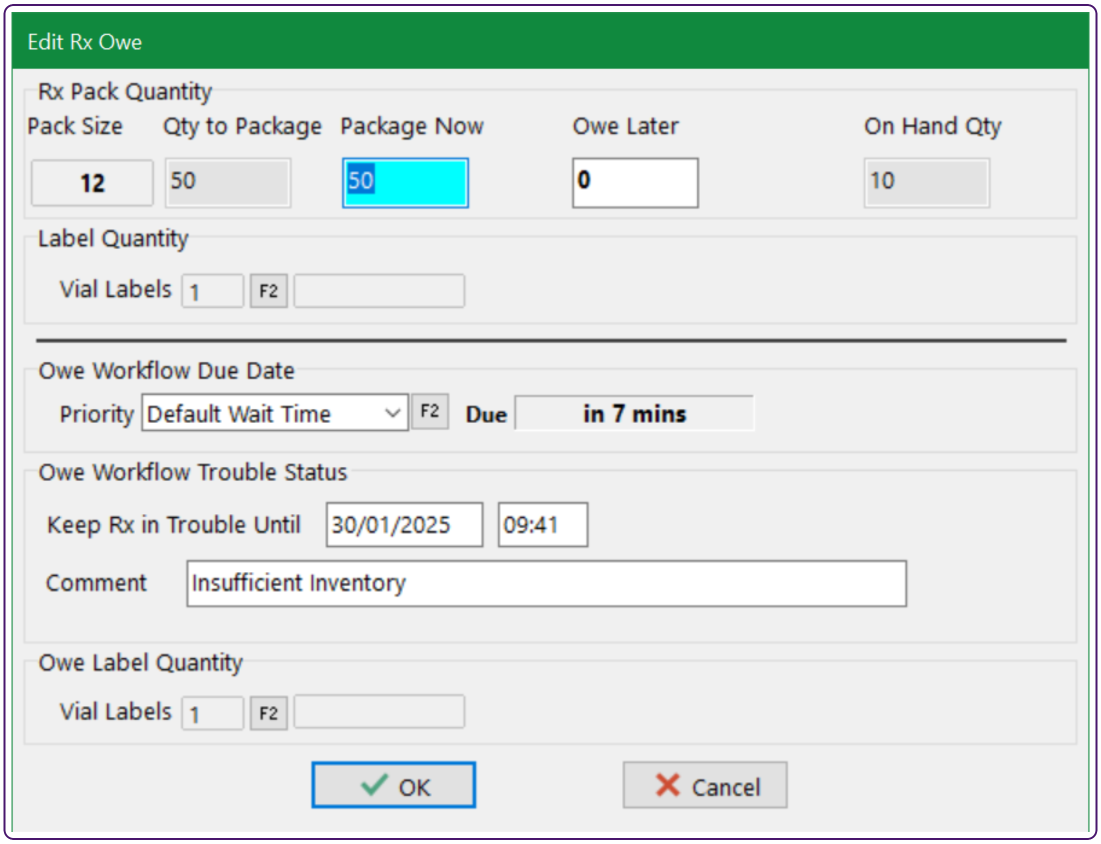
   The **Package Rx** window is displayed.



5. To view a list of the additional Rxs in the patient's work order, select the **F2** button next to the **Work Order** field.

6. If you do not have enough inventory to fill the entire prescription:
   - Select **Owe**.

     The **Edit Rx Owe** pop-up is displayed.



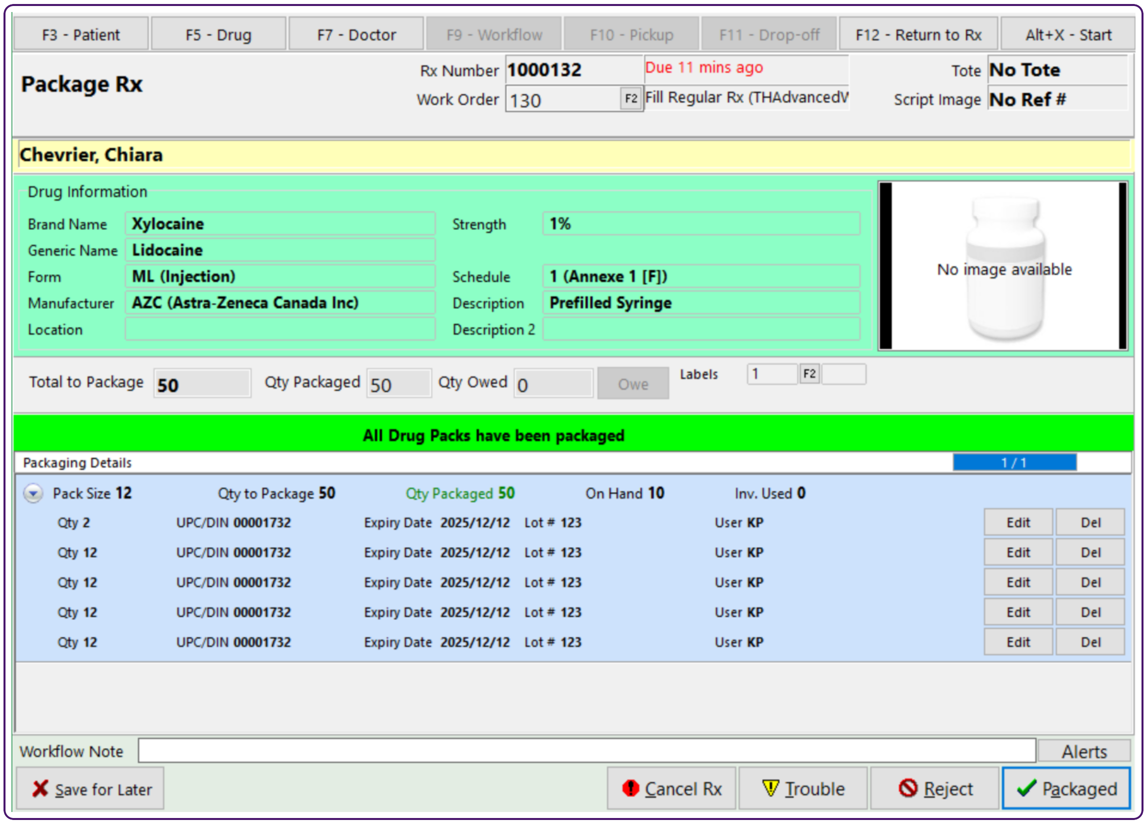
   - Enter the number to **Owe Later**.
   - Adjust the values of the other fields as needed.
   - Select **OK**.
7. In the **DIN** or **UPC** field, enter the DIN or UPC, then select Lookup.

   A DIN or UPC match should be found.
8. Adjust the **Qty** as needed.
9. Enter an **Expiry Date** and **Lot**.
10. Select **Package**.

    The packaging information is added to the **Packaging Details** section.

11. Repeat steps 7 to 10 until you have added all of the packs, as specified by the **Qty** field.

    When you have fulfilled the quantity, a **All Drug Packs have been packaged** message is displayed and the **Packaged** button is enabled.



12. Select **Packaged**.

    You are prompted to print the applicable dispensary labels.

    The Rx you worked on is now ready for pharmacist verification.

13. If it is not ready for pharmacist verification, and you return to the **F9 - Workflow** window, the Rx is now in the **Pharmacist Verification** queue.

Pharmacist Verification

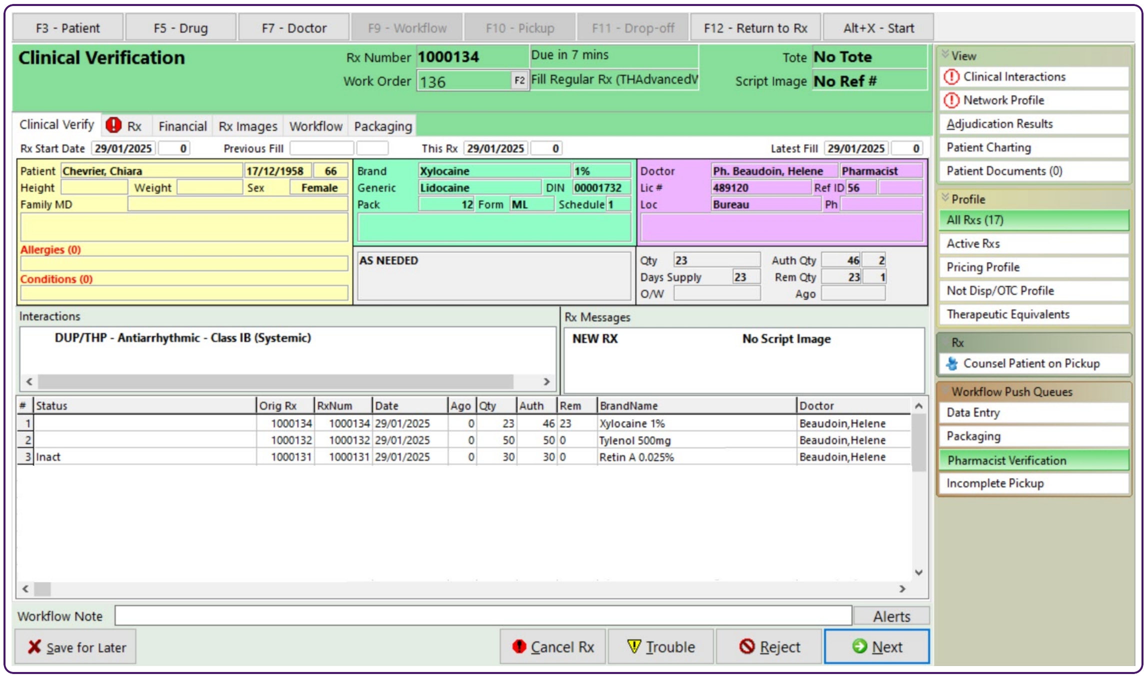
The pharmacist verification stage must be performed by a pharmacist or licensed technician. This is the final check that is made before the prescription is bagged and filed in the pickup drawers. During this stage, you should verify the filled prescription against the written prescription and the electronic drug image displayed on the window.

1. From the **F9 - Workflow** window, select the **Pharmacist Verification** queue.

   The Rxs that are ready to be verified are displayed.

2. Select **Get Work** to view the next work order that needs to be verified, or double click a specific row to select that prescription.

   The **Clinical Verification** window is displayed.



3. Verify that the packaged prescription matches the electronic drug image.

   You can select the tabs to display the Rx or its images, or the financial information, workflow, or packaging.

   The list at the bottom displays all of the patient's Rxs. To view more information about a specific Rx, right click its row and select **Detail**.

4. Select **Approve**.

   You are prompted to print the applicable dispensary labels.

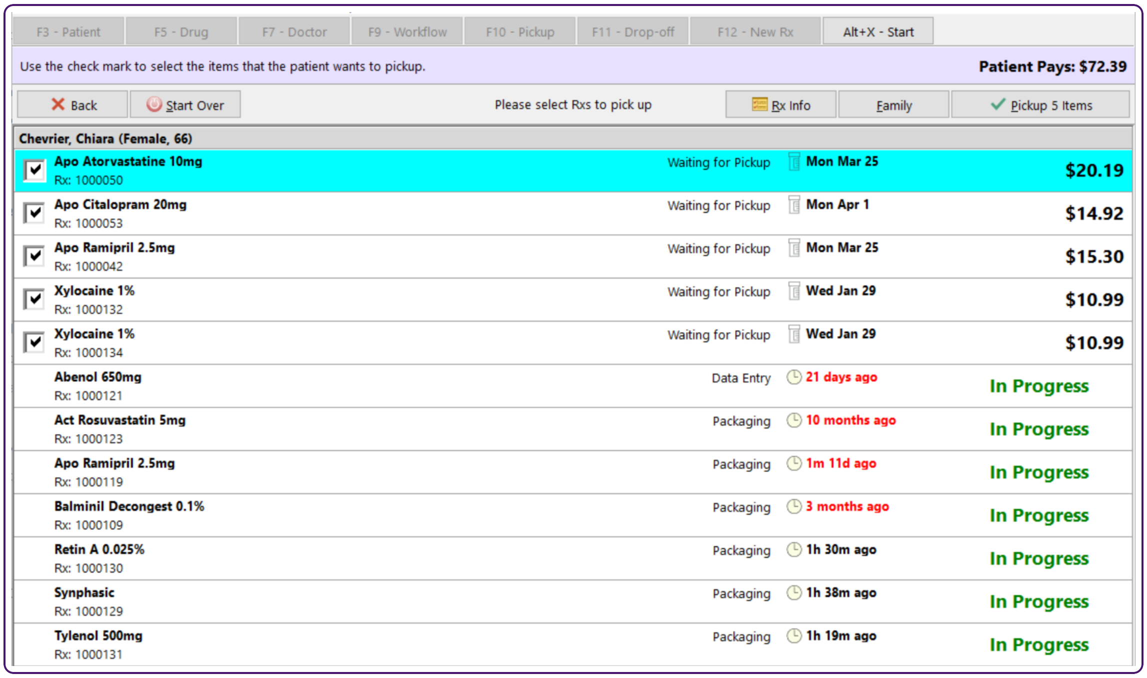
   The Rx is now ready for pickup.

Pickup

During the prescription pick up stage, you verify the identity of the person picking up the prescriptions, identify the number of prescriptions that need to be retrieved from the pickup bins, and identify the location of a prescription.

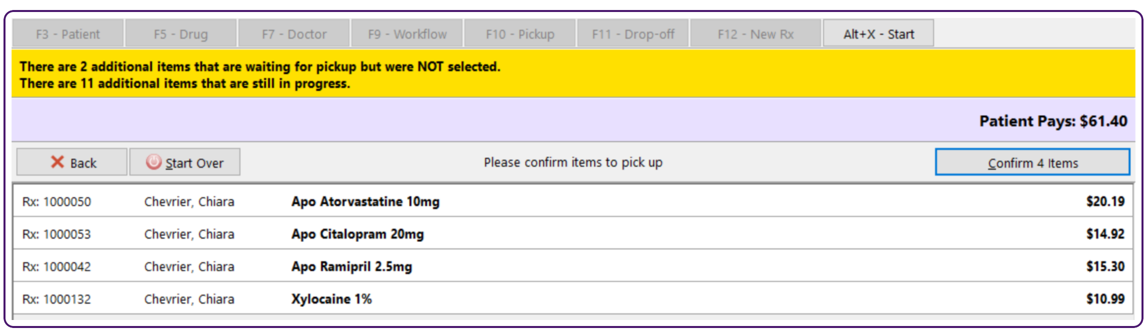
1. Select **F10 - Pickup**.

   The **Pickup** window is displayed.



2. Select the prescriptions the patient is picking up, then select **Pickup # Items**.

   A confirmation window is displayed.



3. Select **Confirm # Items**.

   The selected Rxs are now complete.

Chapter 17

Refill Rx

Refillable Rxs can be filled for patients who had their previous prescription filled at the same pharmacy location. Typically, refill information is entered when the prescription is initially filled, and patients can choose if they want to enrol in the Refill Reminder program, which notifies them when their prescription refills are ready.

From the F3 - Patient window

1. From the **Alt-X Start** window, select **F3 - Patient**.
2. Enter one of the following patient search criteria, then select **Search**:
   - Last name, first Name.

     For example, one of the following: “Doe, Jane”, “doe,j”, “Doe”, or “,Jane”
   - A period (.) and the patient quick code.

     For example, ".DoeJ”
   - A 7 or 10-digit phone number.

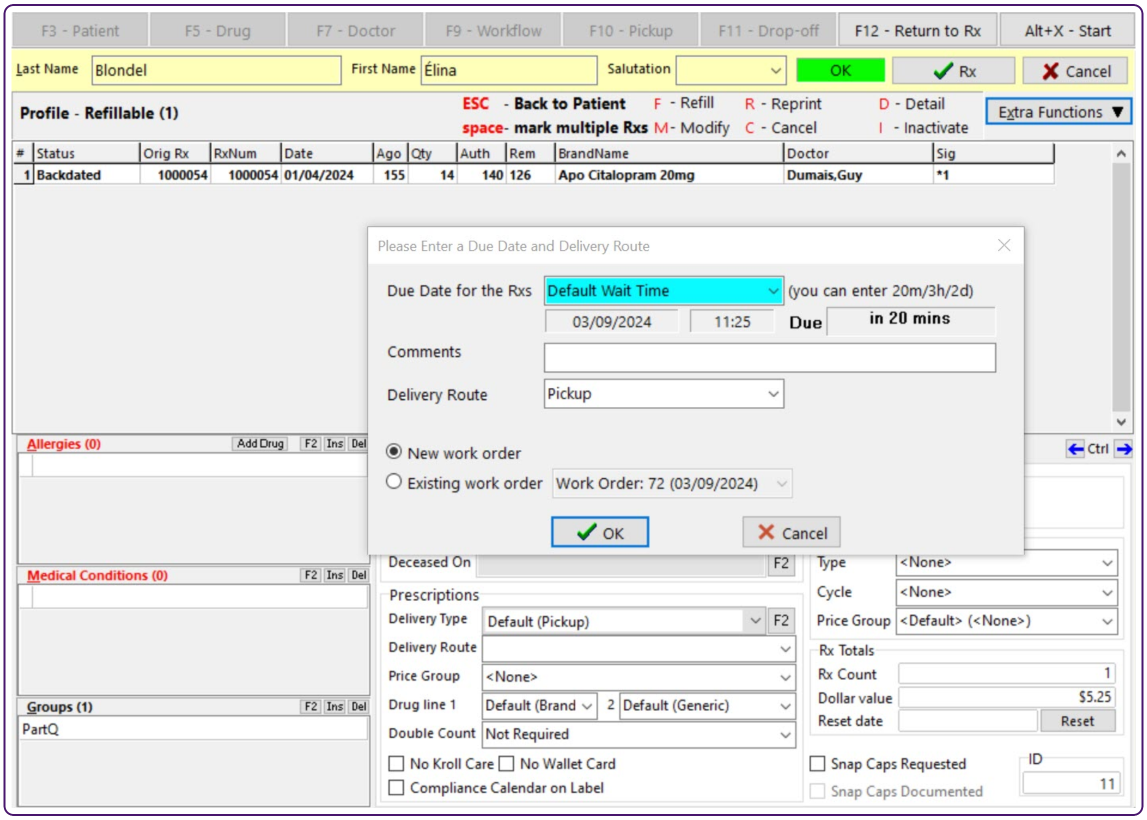
     For example, "800-263-5876" or "263-5876"
   - A number sign (#) and the third party billing number.

     For example, "#123456789"
   - An asterisk (*) to return all of the patients in the database.
3. Double-click the patient record.

   The **F3 - Patient** window is displayed.
4. Select **Refillable Rxs** from the right navigation pane.
5. Use the space bar to highlight the medication(s) the patient would like to refill, then select **F - Refill** or select **Extra Functions** and select **Add To Rx To Do List**.

6. Select a **Due Date for the Rxs**.

   A prescription is added to the **Enter** queue.



7. Complete the workflow.

From the F11 - Drop-Off window

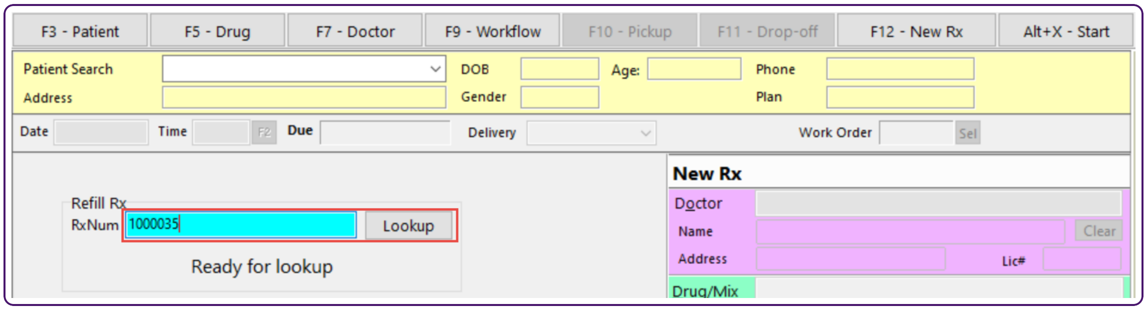
With Rx Number

1. From the **ALT+X Start** window, select **F11- Drop-Off** or press F11.
2. Enter the prescription number in the **RxNum** field, then select **Lookup**.

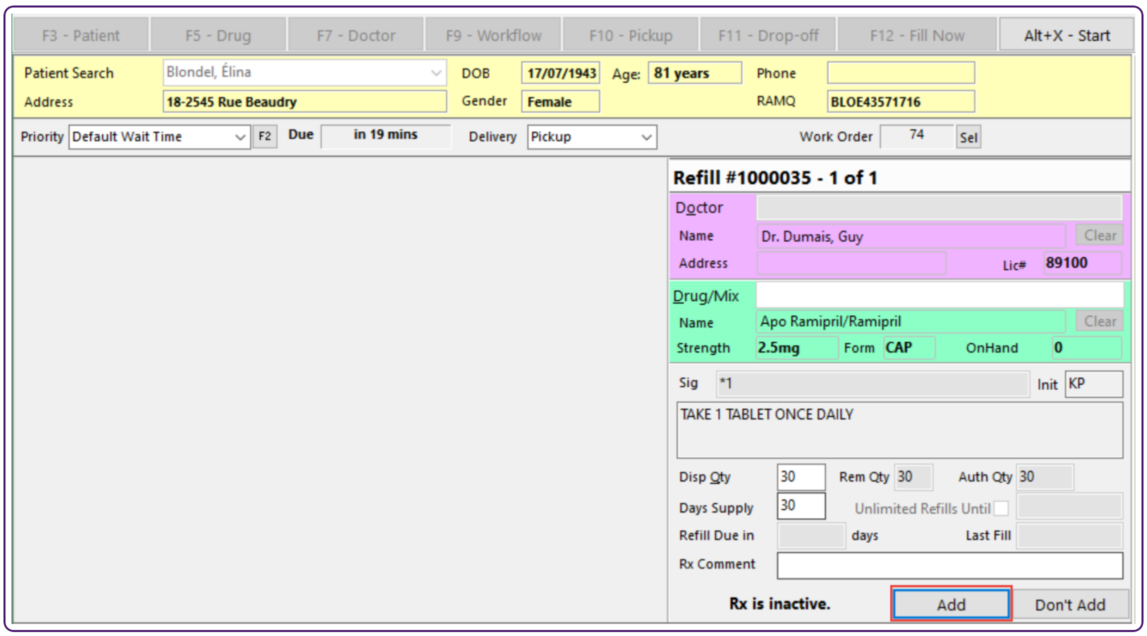
   The Rx is displayed in the **F11 - Drop-Off** window.

3. Enter a **Due** time.

   The prescription is added to the **Enter** queue.



4. To add the Rx to the **Workorder Items** list, select **Add**.



5. Select **Finalize Work Order** to move the prescription to adjudication.

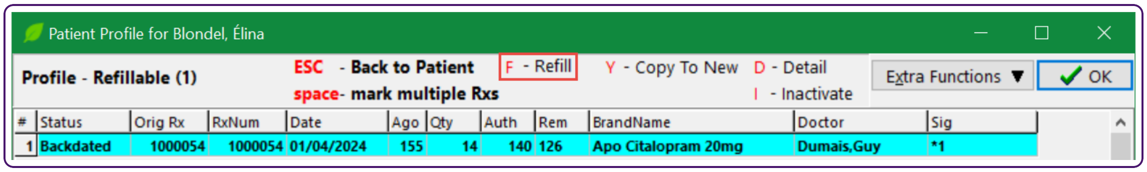
   If any DUR messages are present, the pharmacist will need to resolve them before moving the prescription to the filling queue.

Without Rx Number

1. From the F11- Drop-Off window, perform a patient search.
2. From the right navigation pane, select **Refillable Rxs**

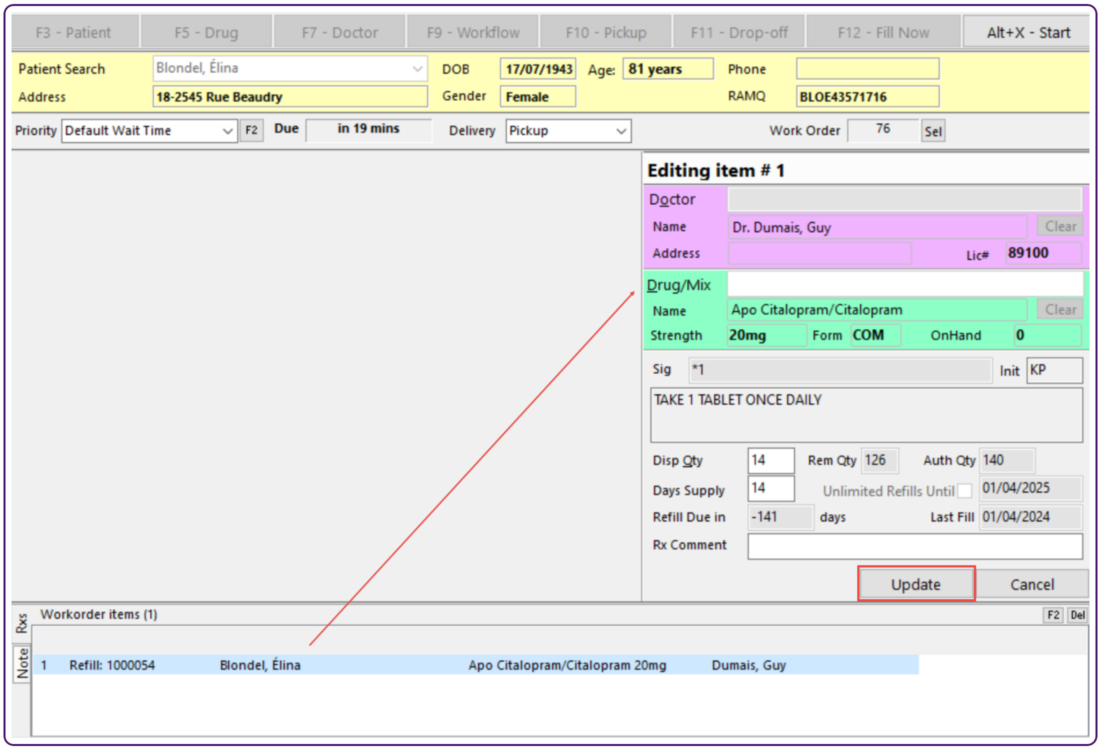
   The patient's profile is displayed.

3. Use the space bar to highlight the Rx(s) you want to refill, then select **F - Refill** or press the F key on your keyboard.



The selected Rxs are displayed in the **Workorder Items** list on the **F11 - Drop-Off** window.

4. To edit any of the information in an Rx:
   - Double-click the Rx to display it in the **F11 - Drop-Off** window.
   - Make the necessary changes and select **Update**.



5. Select **Finalize Work Order**.

Chapter 18

Unfill Rx (On Hold)

Patients may not want all of their prescriptions filled when they drop them off. For documentation purposes, these prescriptions are put on hold and referred to as **Unfilled Rxs**. Unfill Rxs pass through **Drop-Off**, **Enter**, and **Check** processing steps.

Chapter 19

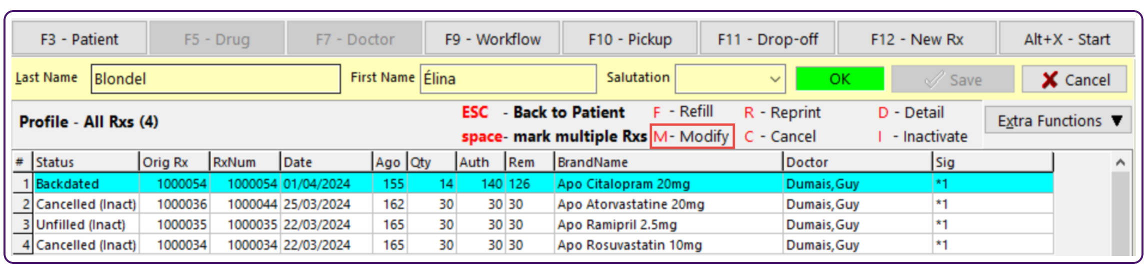
Modify Rx

After a prescription has been processed, you can modify its prescription comments, refills, and other fields that do not have clinical or financial impacts.

Method 1: From the F3 - Patient window

1. From the **Alt-X Start** window, select **F3 - Patient**, then search for and select a patient record.

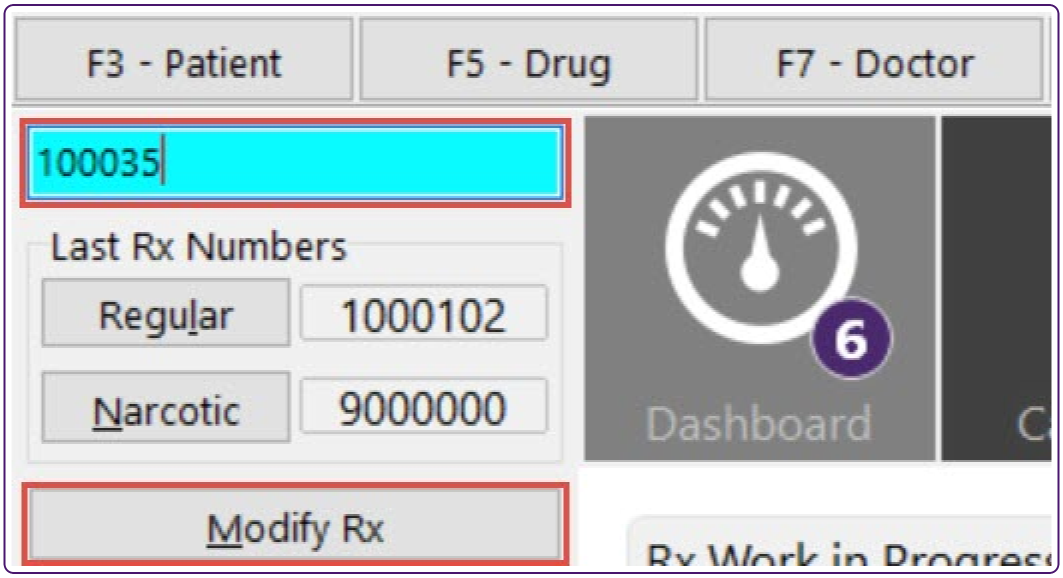
   The patient profile is displayed.
2. Select **All Rxs** from the right navigation pane.
3. Use the space bar to tag the Rx(s) you want to modify.
4. Select **M - Modify** or press the M key.



5. Select **F12 - Save Changes**.

Method 2: From the Alt-X Start window

1. Enter the Rx number in the **Universal Search** field and select **Modify Rx**.



   The Rx is displayed in the F12 window in **Modify** mode.

2. Update the editable fields as needed.
3. Select **F12 - Save Changes**.

Chapter 20

Copy Rx

The Copy Rx function allows you to copy information from an existing prescription to a new prescription. This function is often useful when the doctor renews a patient's existing medications and there is no change in dosage or SIG.

It is not recommended to copy a prescription when the dose, SIG, or prescriber has changed, because copying a prescription creates a link between the new and old prescriptions, as a result of which the original prescription is set to "Inact (Copied)" and cannot be transferred out.

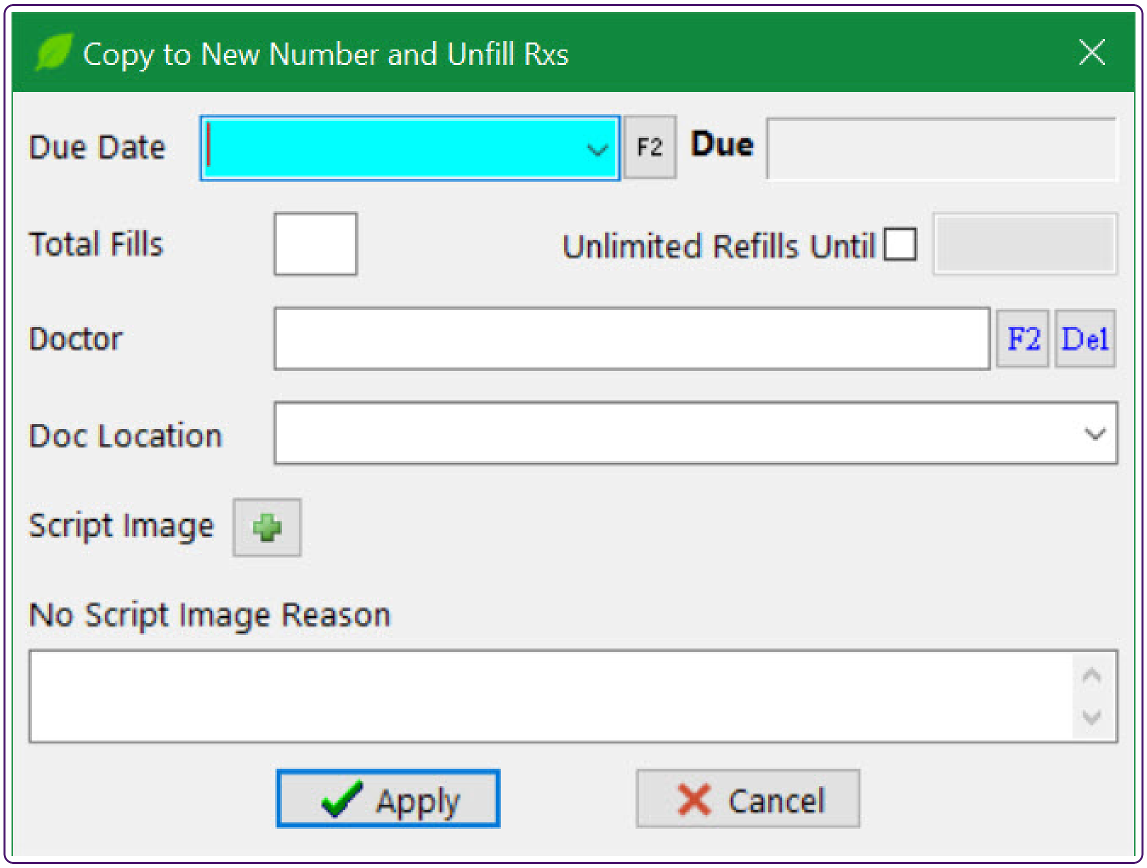
From the F3 - Patient window

1. From the **Alt-X Start** window, select **F3 - Patient**, then search for and select the patient.

   The patient profile is displayed.
2. Select **All Rxs** from the right navigation pane.
3. Use the space bar to tag the Rx(s) you want to copy.

4. Select **Extra Functions** > **Copy to New Num and Make Unfilled**.

   The **Copy to a New Number and Unfill Rxs** pop-up is displayed.

5. Enter or select at least one value on this pop-up, then select **Apply**.

   The copy is displayed in the F12 window as a **New Rx**.

6. Select a due time and change the prescription as needed.
7. Select **F12 - Fill Rx**.
8. Complete the workflow.

Chapter 21

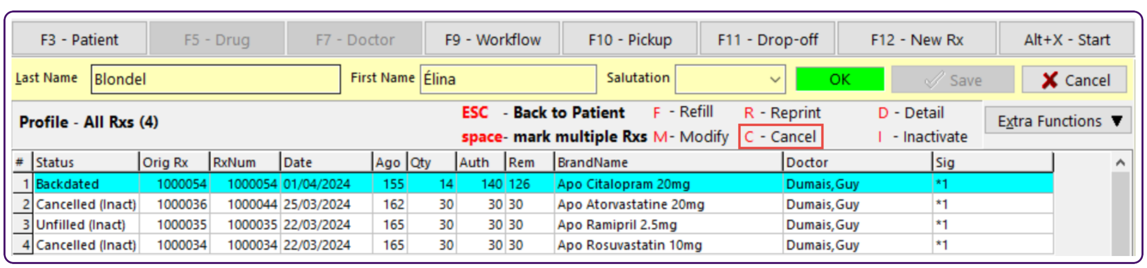
Cancel Rx

When you cancel a prescription, you reverse it, which includes reversing any claims sent to third party plans. You may need to cancel a prescription if, for example, there is a change in dispensing quantity, the wrong SIG was entered, or the patient no longer wants it.

Method 1: From the F3 - Patient window

1. From the **Alt-X Start** window, select **F3 - Patient**, then search for and select a patient.

   The patient profile is displayed.
2. Select **All Rxs** from the right navigation pane.
3. Use the space bar to tag the Rx(s) you want to modify.
4. Select **C - Cancel** or press C.

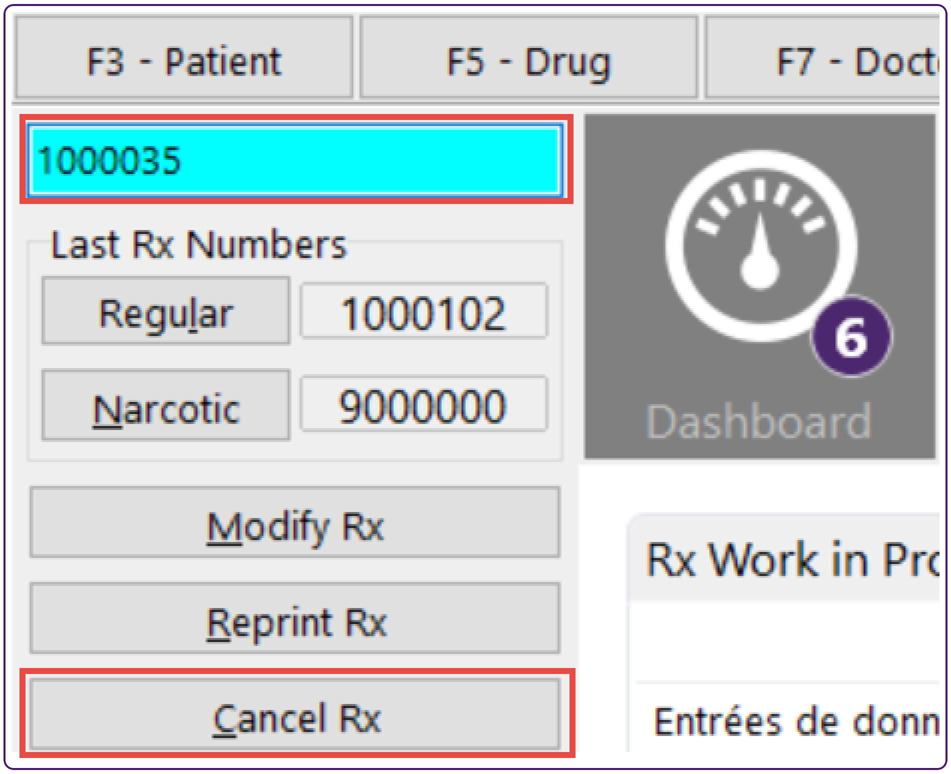
   

   The system prompts you with various messages for cancelling the prescriptions.

   These messages vary depending on the type of prescription you are cancelling

Method 2: From the Alt-X Start window

1. Enter the Rx number in the **Universal Search** field and select **Cancel Rx**.



A prompt appears, asking if you are sure you want to cancel the Rx.

2. Select **Yes**.

Chapter 22

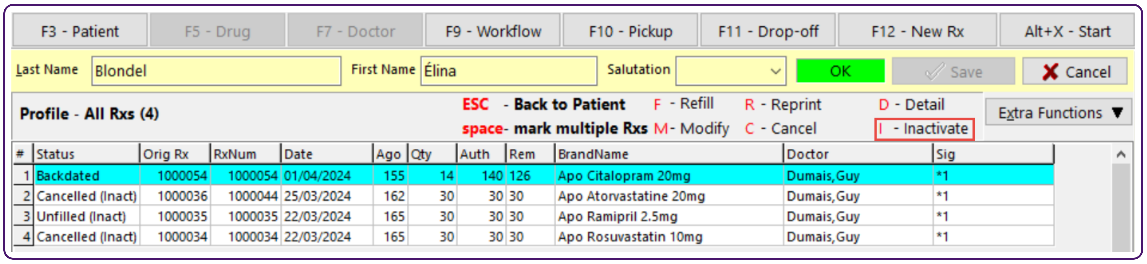
Inactivate Rx

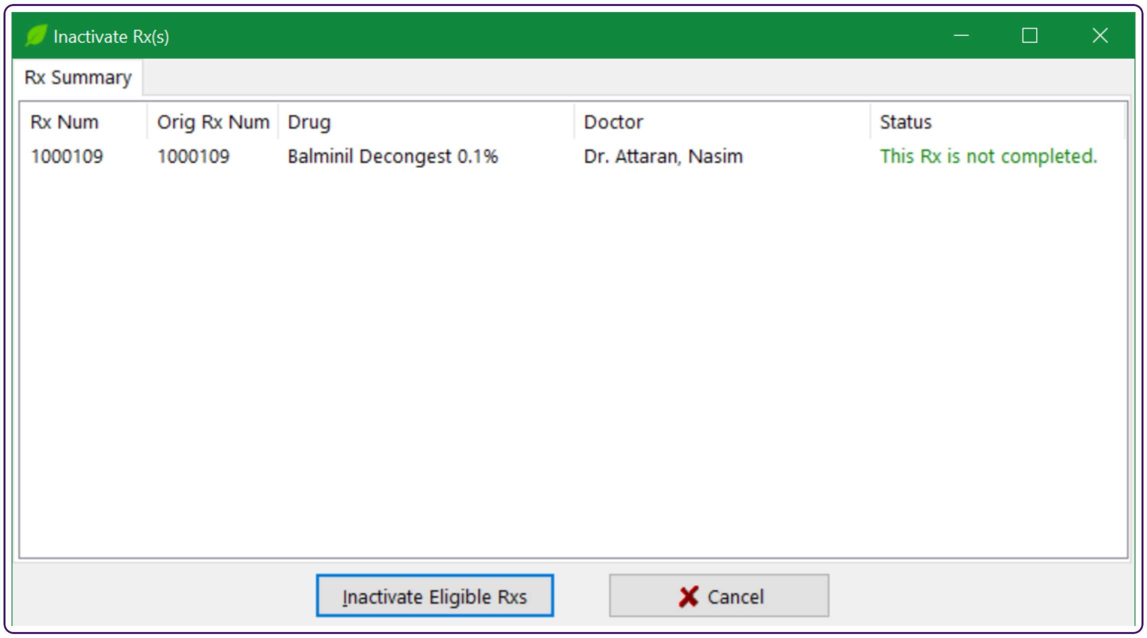
If a patient is no longer using a certain medication as part of their medication therapy, the associated prescription should be manually inactivated. Prescriptions are automatically inactivated when they are copied to a new prescription number or if they are transferred out of the pharmacy.

1. From the **Alt-X Start** window, select **F3 - Patient**, then search for and select the patient.

   The patient profile is displayed.
2. Select **All Rxs** from the right navigation pane.
3. Use the space bar to tag the Rx(s) you want to modify.

4. Select **I - Inactivate** or press the I key.





You are prompted to enter an optional reason for inactivating the Rx.

5. Select **OK** to continue.

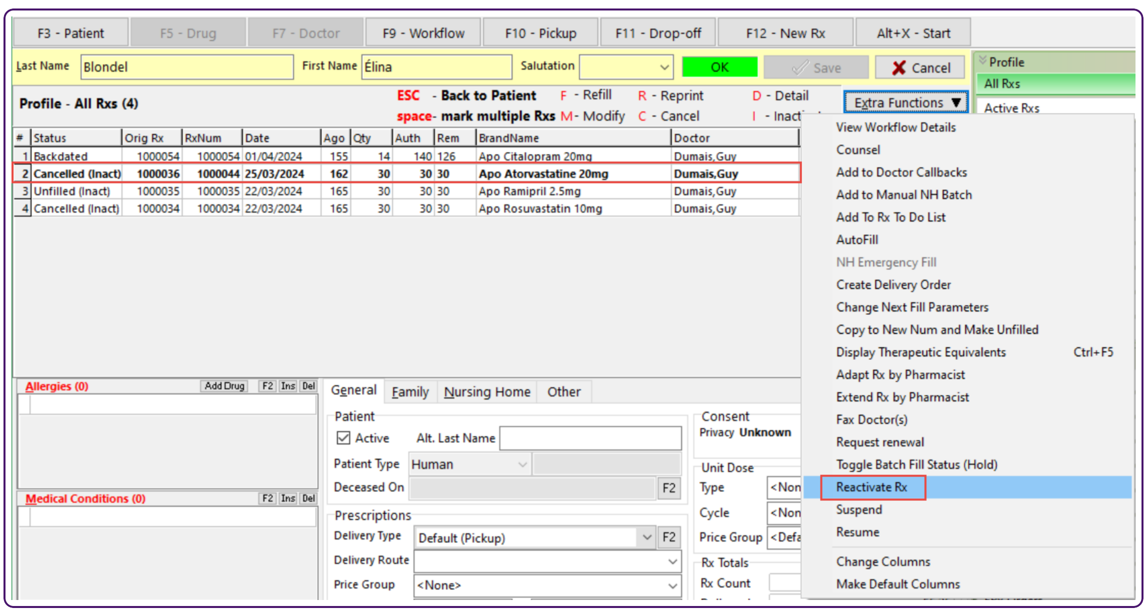
The status of the prescription in the patient profile is set to 'Inact'.

Chapter 23

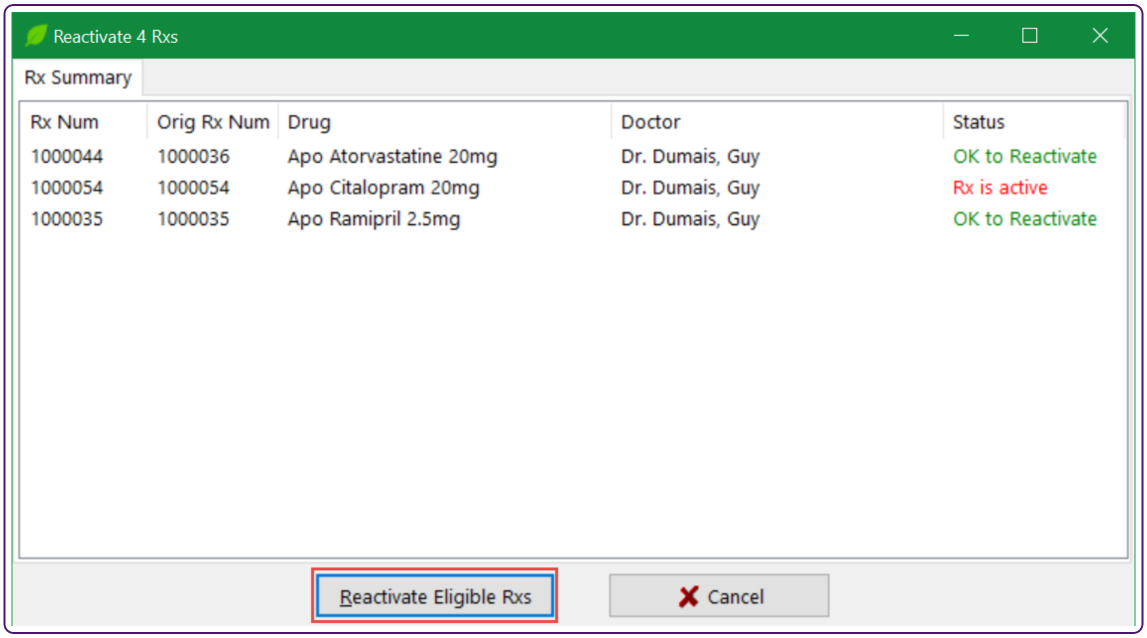
Reactivate Rx

1. From the **Alt-X Start** window, select **F3 - Patient**, then search for and select the patient.

   The patient profile is displayed.
2. Select **All Rxs** from the right navigation pane.
3. Use the space bar on your keyboard to tag the Rx(s) you want to modify.
4. Select **Extra Functions** > **Reactivate Rx**.



5. The **Reactivate Rx** window displays the selected Rx(s). The **Status** indicates if an Rx is eligible to be reactivated.



Chapter 24

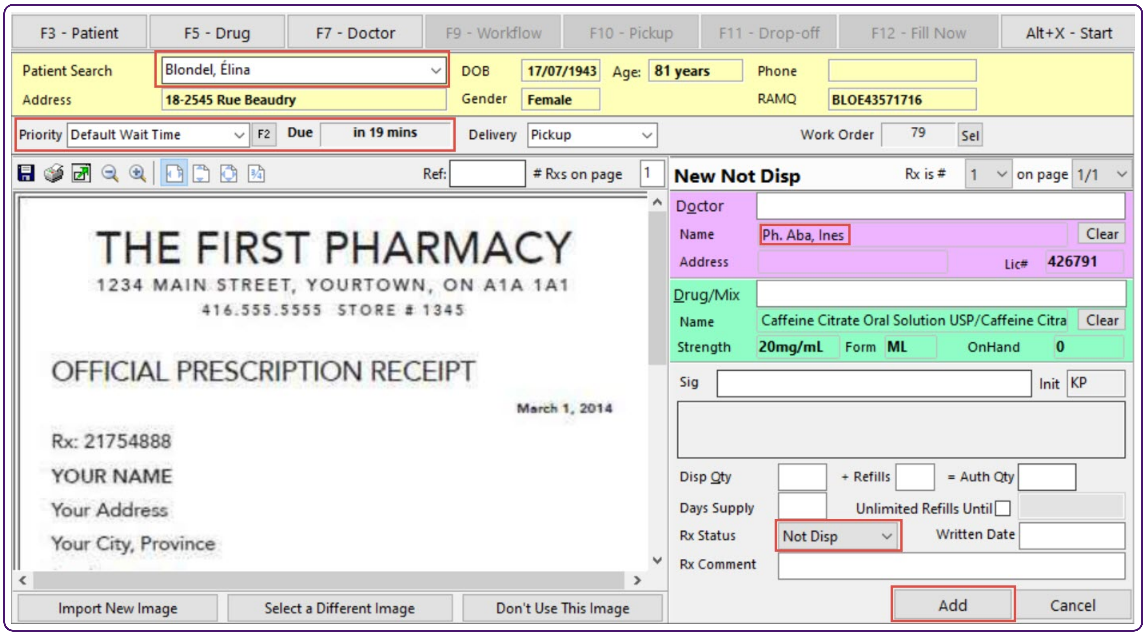
Not Dispensed Rx

Over-the-counter medicines that are taken by the patient are included in the patient profile for drug interaction analysis. In Kroll, these "OTC to profile records" are known as **Not Dispensed Rxs** because the pharmacist did not dispense a prescription.

Drop-Off

1. From the **ALT+X Start** window, select **F11- Drop-Off** or press F11.
2. Search for the patient and select a **Due** time.
3. Use the document scanner to scan any counseling notes about the OTC product into the system.
4. Set the **Rx Status** to Not Dispensed.
5. In the **Doctor** field, enter the name of the pharmacist on duty.

6. Select **Add** to add the work order to the **Workorder items** list.



7. Select **Finalize Work Order**.

Enter

During the **Enter** stage, you enter prescription information such as Drug, SIG, Dispense Quantity, and Intervention Codes into the system for processing.

1. From the **Alt-X Start** window, select **F9 - Workflow**.
2. Select Enter to display the enter queue.
3. Double-click the **Not Dispensed** Rx record.

   The F12 window displays the Rx details entered at Drop-Off.
4. Enter any missing Rx information, such as the Dispense Quantity and Intervention Codes.
5. To specify a stop date, select the **Dates** tab and enter an Rx **Stop** date.

   If the store is connected to a Drug Information System, you may be required to enter a stop date.
6. Select **F12 - Fill Rx** or press the F12 key.

Chapter 25

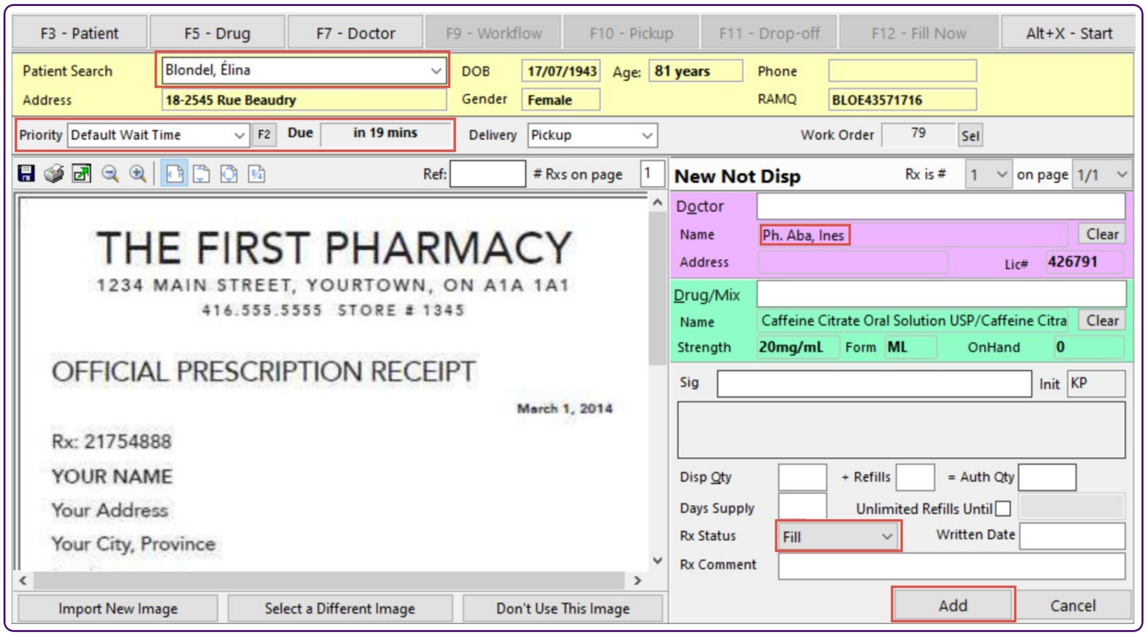
Fee for Service Rx

Fee for service prescriptions are billed to third parties for professional service rendered by the pharmacist to the patient. They include prescription adaptation services, medication reviews, refusals to fill, and smoking cessation. Since these services are intangible and do not involve the dispensing of a drug product, some of the elements of prescription processing may be eliminated. Fee for service prescriptions should always be filled after the service has been provided to the patient.

Drop-Off

1. From the **ALT+X Start** window, select **F11- Drop-Off** or press F11.
2. Search for the patient and select a **Due** time.
3. Set the **Rx Status** to Fill.

4. Select **Add** to add the work order to the **Workorder items** list.



5. Select **Finalize Work Order**.

Enter

Fee for service drug records typically have a DIN or Pseudo DIN used for billing, but do not have UPC, counseling, drug monograph, or ordering tabs, as these do not apply for services rendered to a patient.

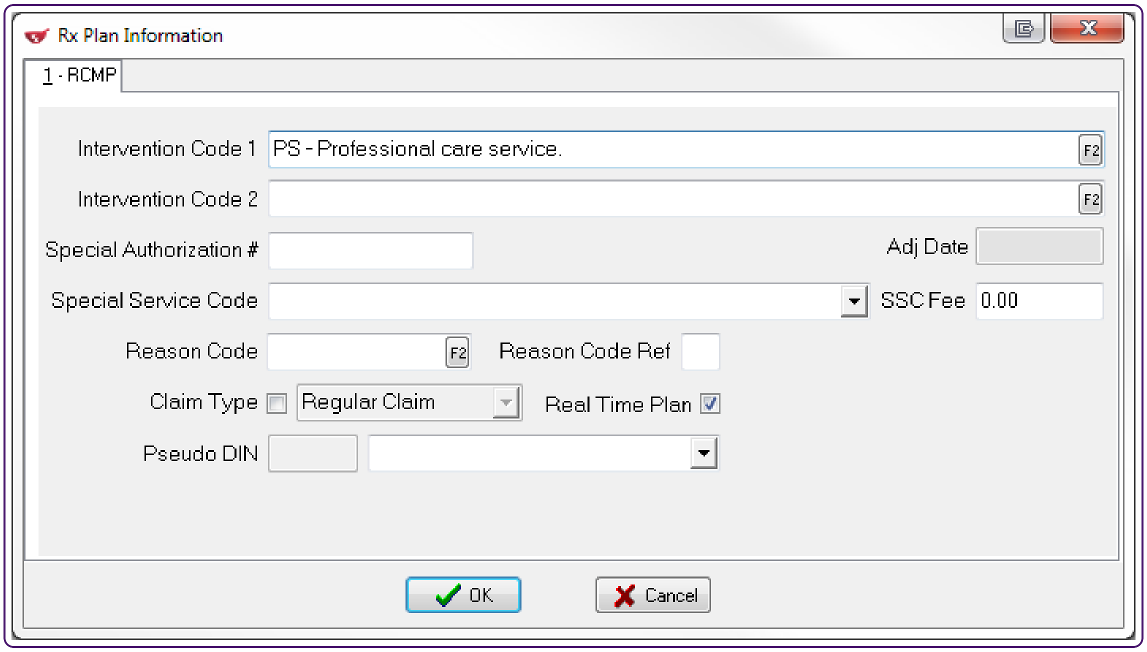
1. From the **Alt-X Start** window, select **F9 - Workflow**
2. Select Enter to display the enter queue.
3. Double-click the Rx record.

   The **F12** window displays the Rx details entered at Drop-Off.
4. Use the **Drug Search** field to search for and select the applicable professional service.

   Depending on what you select, the system may send a Special Services Code, Intervention Code, Rx prefix, etc. to third parties as a part of billing requirements.

   The **Drug Price Group** field may specify a pricing strategy to apply to the drug record for prescriptions filled for the service.
5. In the **Doctor** field, enter the name of the pharmacist who provided the professional service.

6. To view any intervention codes or special service codes that will be submitted to third parties as part of the claim, select **Plan Information** from the right navigation pane to display the **Rx Plan Information** window.



7. Enter any remaining Rx information.
8. Select **F12 - Fill Rx** or press F12.

Chapter 26

Transfer Rx

Prescriptions can be transferred into or out of the pharmacy. In both cases, information regarding the transfer is recorded in the system.

Transferring an Rx from another store

Transfers received from other pharmacies are treated as new prescriptions and must go through the same stages as new prescriptions.

Drop-Off

1. From the **ALT+X Start** window, select **F11- Drop-Off** or press F11.
2. Search for and select the patient.
3. Feed the transfer report into the document scanner and select **Import Script Image File**.
4. Select **Add** to add the work order to the **Workorder items** list.
5. Select **Finalize Work Order**.

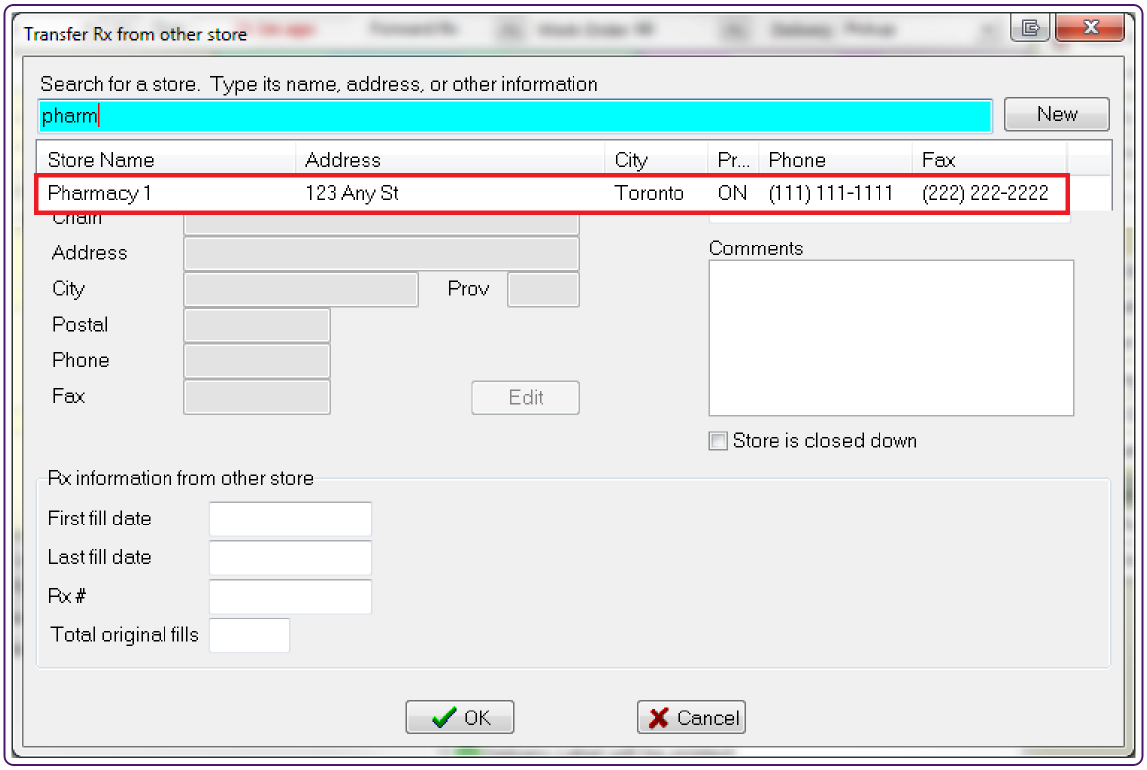
Enter

1. From the **Alt-X Start** window, select **F9 - Workflow** .
2. Select Enter to display the enter queue.
3. Double-click the Rx record.

   The F12 window displays the Rx details entered at Drop-Off.
4. Select **Transfer Rx From Another Store** from the right navigation pane.

   The **Transfer Rx from other store** window is displayed.

5. In the **Search for a store** field, begin typing the name of the originating pharmacy. If a matching pharmacy is located, either double-click the entry or highlight the entry and press Enter.



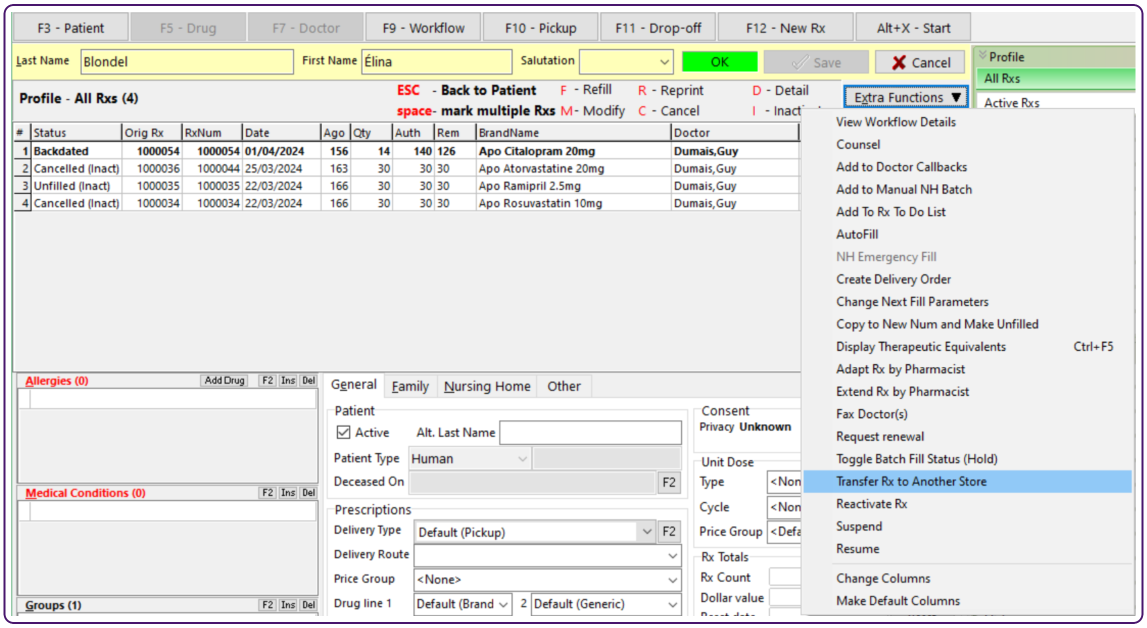
If no matching pharmacy is found, select **New** to insert a new transfer pharmacy record, then complete the **Create Store** form and select **OK**.

6. In the **Pharmacist Name** field, enter the name of the pharmacist on duty.
7. Enter any available Rx information in the **Rx information from other store** fields.
8. Select **OK**.
9. Complete the remaining Rx fields and select **F12 - Fill Rx**.

Transferring an Rx to another store

1. From the **F3 - Patient** window, search for and select a patient.
2. Select **All Rxs** from the right navigation pane.
3. Use the space bar to tag the Rx(s) you want to transfer.

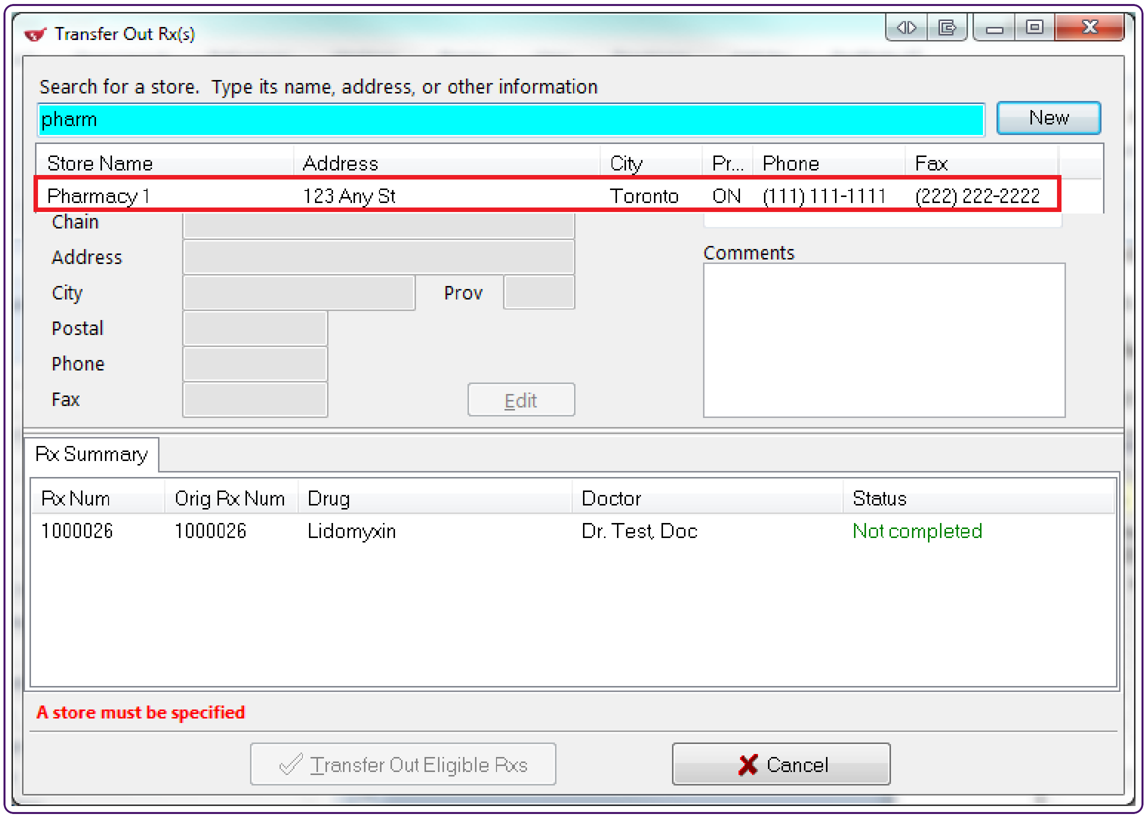
4. Select **Extra Functions** > **Transfer Rx to Another Store**.



The **Transfer Out Rx(s)** window is displayed.

5. In the **Search for a store** field, begin typing the name of the pharmacy to which you want to transfer the Rx.

6. If a matching pharmacy is located, double-click the entry, or highlight it and press Enter.



   If no matching pharmacy is found, select **New** to insert a new transfer pharmacy record, then complete the **Create Store** form and select **OK**.

7. In the **Pharmacist Name** field, enter the name of the pharmacist on duty.
8. Select **Transfer Out Eligible Rxs**.

   A prompt appears, asking if you want to print the transfer report.

9. Select **Yes** or **No** accordingly.

   The Rx shows a status of Inact (Transferred Out) in the patient profile.

Chapter 27

Merges

You can merge two different patient, drug, or prescriber records into a single, unified record.

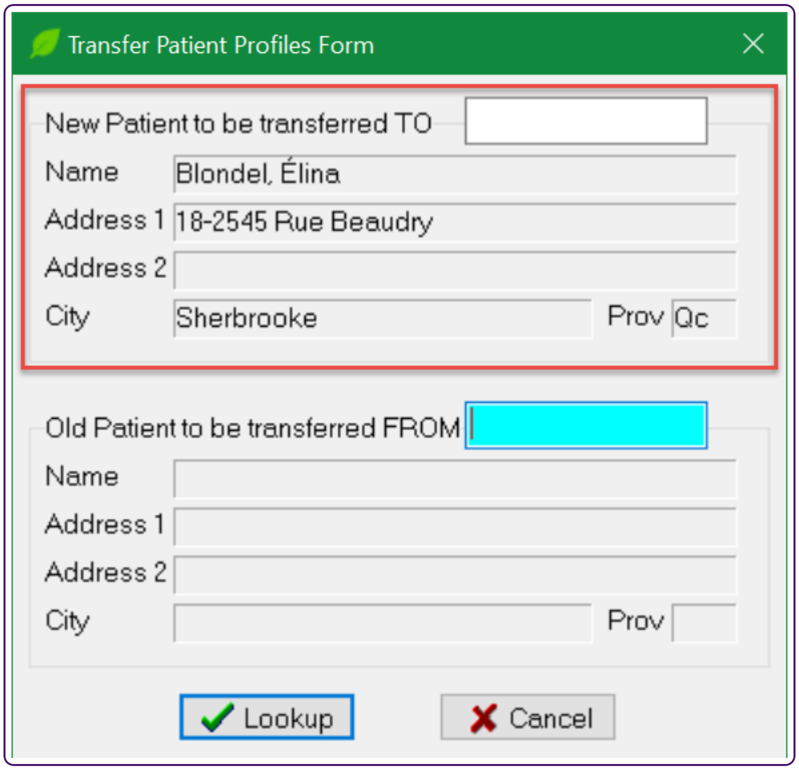
Patient merges

1. From the **Alt-X Start** window, select **Utilities** > **Merge** > **Patients**.

   The **Transfer Patient Profiles** form is displayed.

2. From the **New Patient to be transferred TO** field, search for and select the patient record you want to keep.

   The patient's address is added to the form.



3. From the **Old Patient to be transferred FROM** field, search for and select the patient record you want to merge.

   The patient's address is added to the form.

4. Select **Transfer**.

   A prompt appears, asking if you are sure you want to merge the two patients.

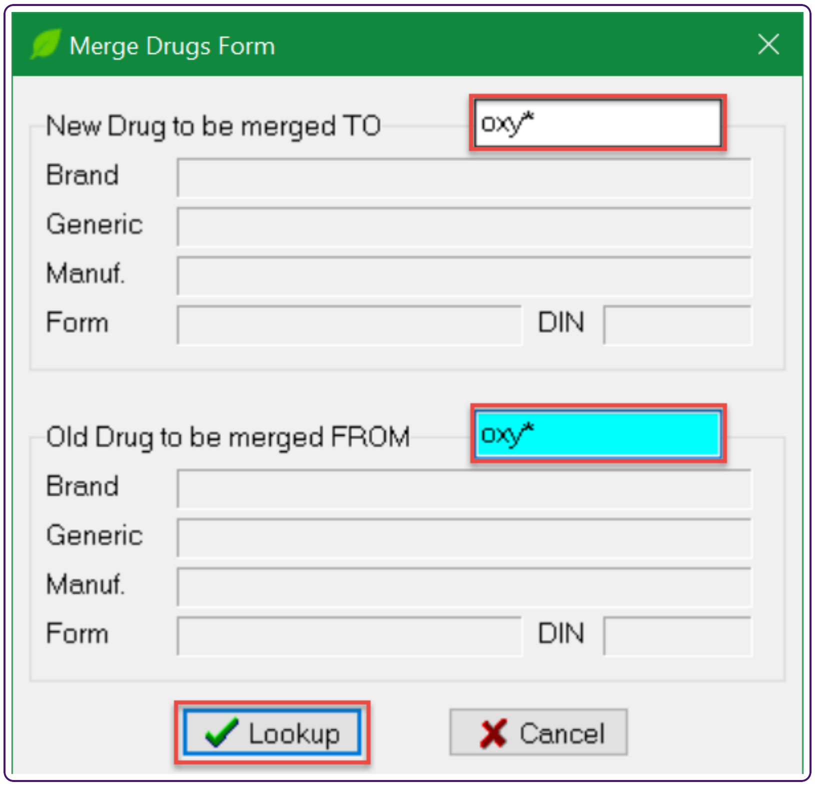
5. Select **Yes**.
6. Select **Cancel** to close the **Transfer Patient Profiles Form**.

Drug merges

1. From the **Alt-X Start** window, select **Utilities** > **Merge** > **Drugs**.

   The **Merge Drugs** form is displayed.

2. Enter the drug names in the respective **New Drug to be merged TO** and **Old Drug to be merged FROM** fields and select **Lookup**.



3. From the list of search results, select the drug you want to merge, then click **Select**. Click **Select** again.

   A second list of search results is displayed.

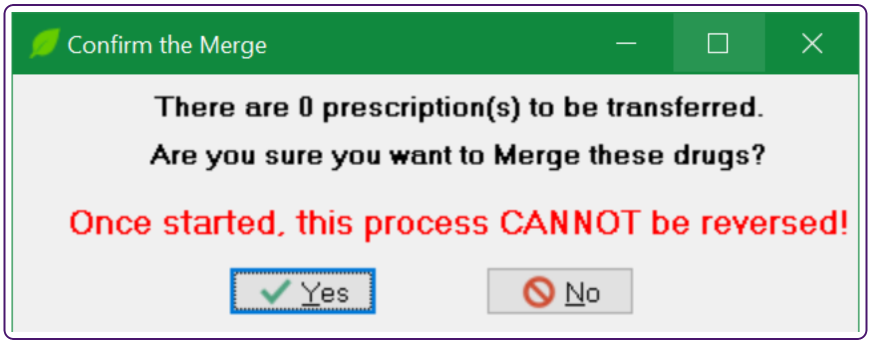
4. From the second list, select the drug you want to merge from, then click **Select**. Click **Select** again.

   The **Merge Drugs Form** is displayed again, with both drugs shown.

5. Select **Transfer**.

   A prompt is displayed, asking if you are sure you want to merge the drugs.

6. Select **Yes**.



   The **Merge Pack Size** form appears, asking you which drug pack you want to keep and if you want to merge the on-hand quantities for both drugs.

7. Select **From Drug** to retain the drug pack for the drug you merged from, or **To Drug** to retain the drug pack for the drug you merged to.
8. Select **Merge On Hand Quantities** if you want the on-hand quantities for both drugs to be merged.

   A prompt appears, asking you to confirm the number of prescriptions that were transferred to the new drug, and if you want to delete the old drug from the system.

   If you select **Yes**, the old drug is deleted and drug you merged to remains.

   If you select **No**, the drug you merged from remains in the system.

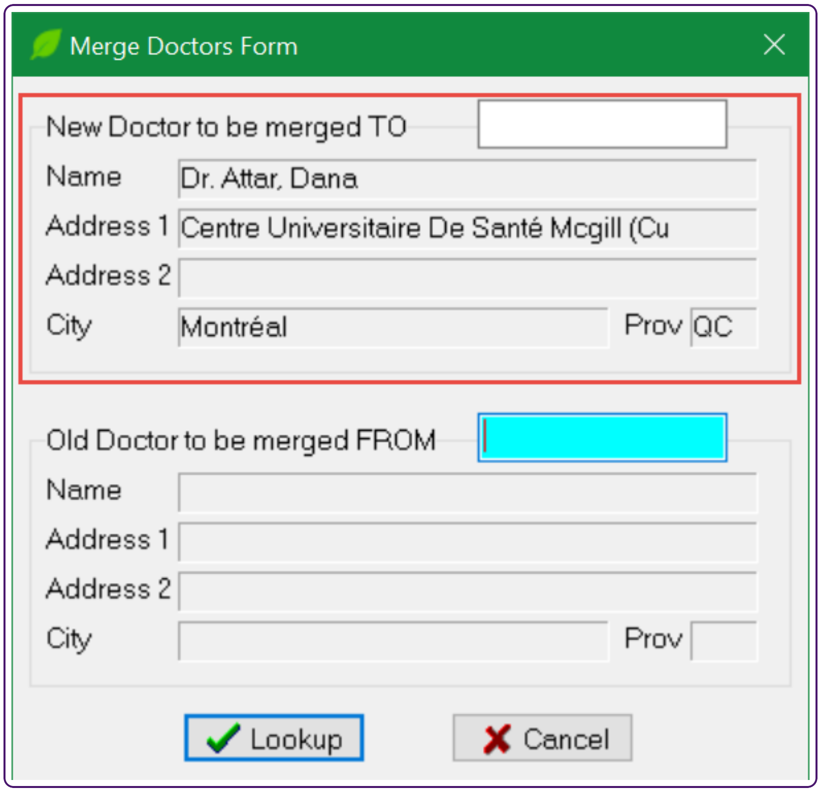
Prescriber merges

1. From the **Alt-X Start** window, select **Utilities** > **Merge** > **Doctors**.

   The **Merge Doctors** form is displayed.

2. From the **New Doctor to be transferred TO** field, search for and select the prescriber record you want to keep.

   The prescriber's address is added to the form.



3. From the **Old Doctor to be merged FROM** field, search for and select the prescriber record you want to merge.

   The prescriber's address is added to the form.

4. Select **Transfer**.

   A prompt appears, asking if you are sure you want to merge the two prescribers.

5. Select **Yes**.

6. Select **Cancel** to close the **Merge Doctors** Form.

Chapter 28

Patient credit cards

The privacy and security of patient credit card information in Kroll complies with Payment Card Industry (PCI) regulations. Access to credit card information is limited to individuals belonging to groups for which the **Allow Credit Card Password Management** permission is enabled.

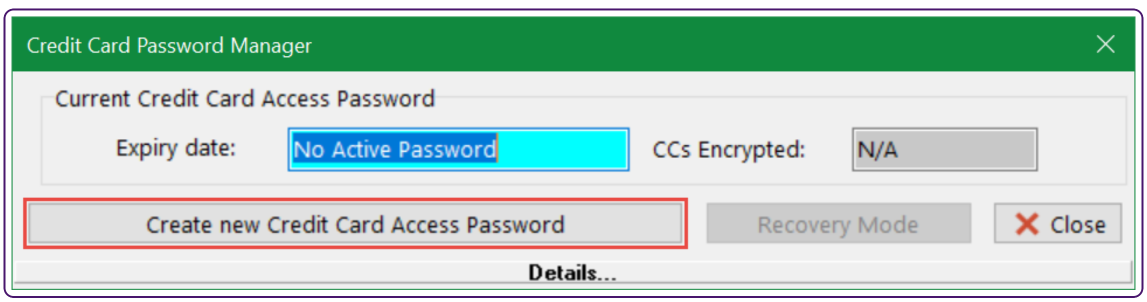
For more information, see Permissions.

Creating a credit card access password

1. From the **Alt-X Start** window, select **Utilities** > **Credit Card Password Manager**.

   The **Credit Card Password Manager** window is displayed.

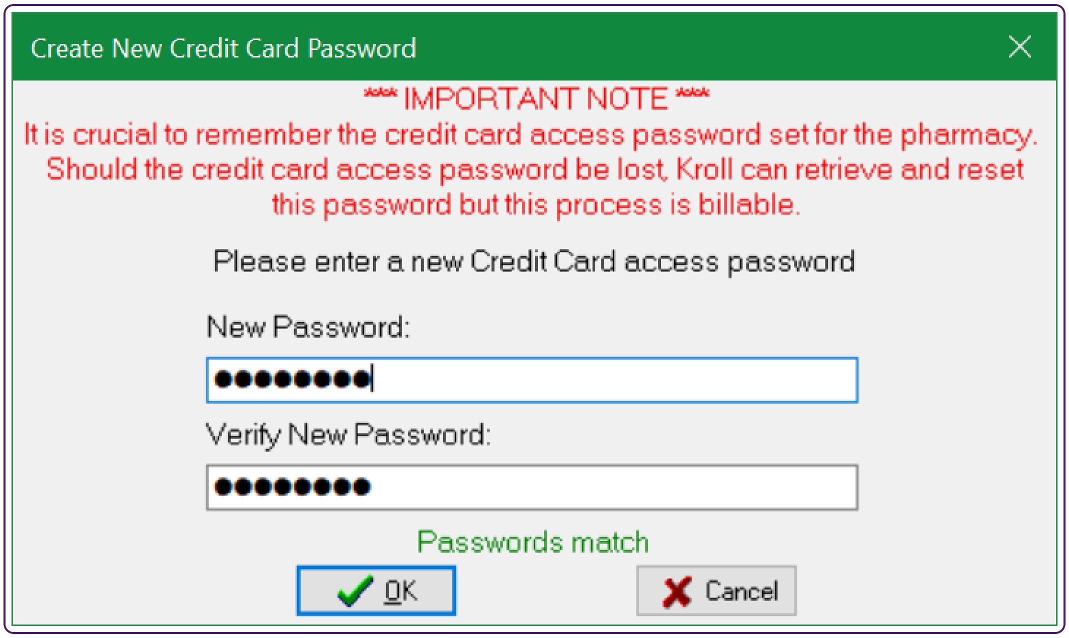
2. Select **Create new Credit Card Access Password**.

   The **Create New Credit Card Password** form is displayed.

3. Enter the credit card password in the **New Password** and **Verify New Password** fields, then select **OK**.

   Passwords must be at least seven characters in length and contain both alpha and numeric characters.

   The **Credit Card Password Manager** window shows an **Expiry date** of three months from today's date.

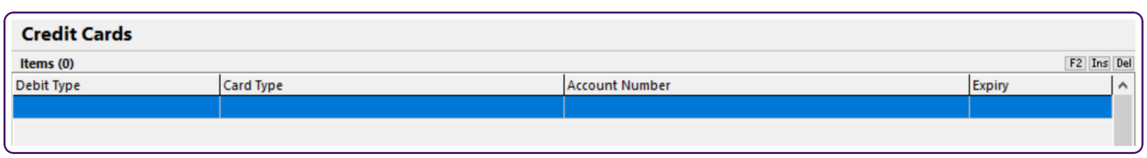
4. Select **Close** to exit the window.

Entering patient credit and debit cards

1. From the patient profile, select **Patient** > **View Credit Cards**.

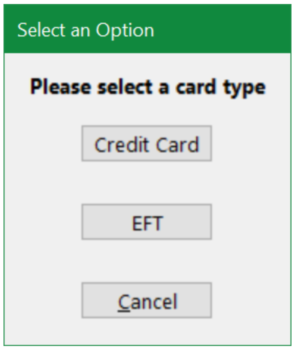
   The **Credit Cards** panel is displayed.

2. Select **Ins** or press the Insert key.

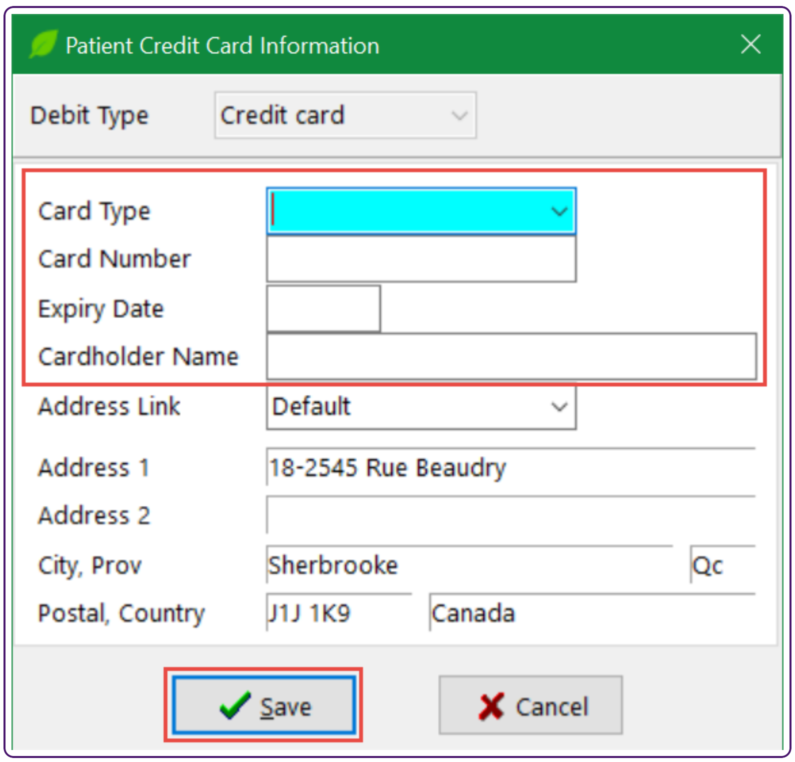
   

   The **Patient Credit Card** Information form appears with the patient's address information filled in.

3. Select a **Card Type**.

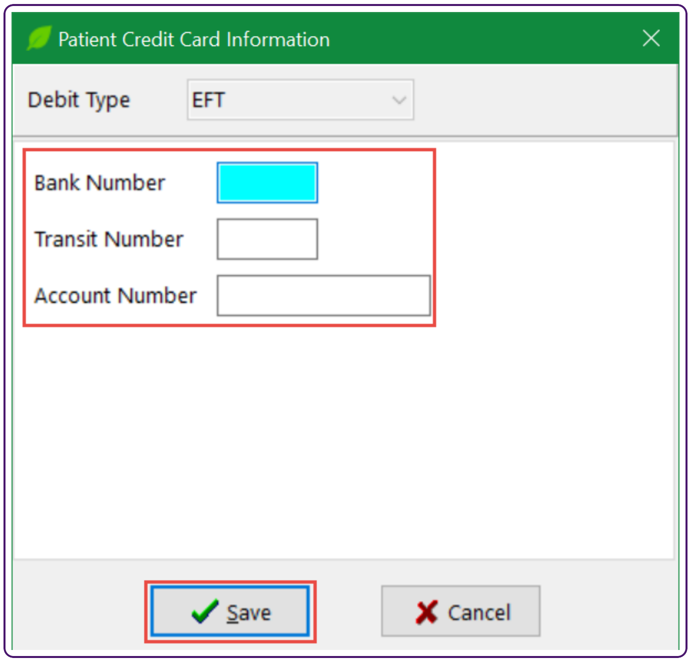


4. If you selected **Credit Card**:
   - Select the **Card Type** and enter the **Card Number**, **Expiry Date**, and **Cardholder Name**.

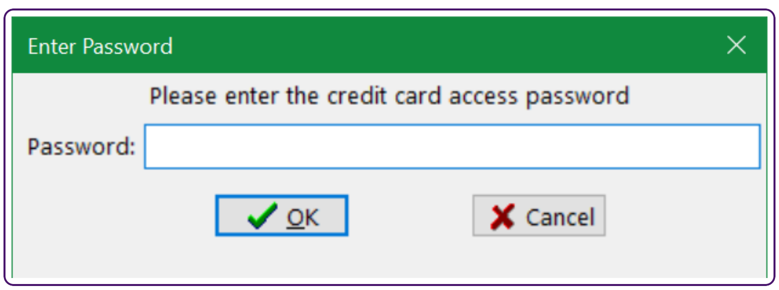


   - Select **Save**.

5. If you selected **EFT**:
    - Enter the **Bank Number**, **Transit Number**, and **Account Number**.



    - Select **Save**.
6. Enter the credit card password in the **Password** field and select **OK**.



The credit or debit card is added to the list on the **Credit Cards** panel.

Modifying a credit and debit card records

1. From the patient profile, select **Patient** > **View Credit Cards**.

   The **Patient Credit Card List** window is displayed.
2. Select the card you want to modify and select or press F2.
3. Update the card information and select **Save**.
4. Click **Close** to exit the **Patient Credit Card List** window.

Deleting a credit or debit card record

1. From the patient profile, select **Patient** > **View** > **Credit cards**.

   The **Patient Credit Card List** window is displayed.

2. Select the credit card you want to modify and select **Del** or press Delete.

   A prompt appears, asking if you are sure you want to delete the credit card record.

3. Select **Yes**.
4. Select **Close** to exit the **Patient Credit Card Information** window.

Chapter 29

Reports

You can access the Kroll reports from the menu, by selecting **Reports** and then the type of report, or by selecting **Reports** > **Search** and entering part of the report name.

The following types of reports are supported in Kroll 10:

- Patient
- Rx
- Drug
- Doctor
- Nursing Home
- Administration
- Other
- Old

Common daily reports

This section outlines the most commonly used daily reports.

Pharmacy End of Day report

The **Pharmacy End of Day** report shows a snapshot of the prescription totals for the day.

1. To generate this report, select **File** > **Exit** or press Alt + F + Q.

   A prompt appears, asking if you want to print this report.

2. Select **Yes**.

Totals For **10-Sep-2014**			
New Rxs	0	Acq	0.00
Repeat Rxs	0	Eff. Mkup	0.00
Total Rxs	0	Eff.Mkup%	0.00
Printed On:		Fee	0.00
10/09/2014 09:21:50		Total	0.00
		G.P. %	0.00

Totals For **10-Sep-2014**			
New Rxs	0	Acq	0.00
Repeat Rxs	0	Eff. Mkup	0.00
Total Rxs	0	Eff.Mkup%	0.00
Printed On:		Fee	0.00
10/09/2014 09:21:50		Total	0.00
		G.P. %	0.00

Totals For **10-Sep-2014**			
New Rxs	0	Acq	0.00
Repeat Rxs	0	Eff. Mkup	0.00
Total Rxs	0	Eff.Mkup%	0.00
Printed On:		Fee	0.00
10/09/2014 09:21:50		Total	0.00
		G.P. %	0.00

Network Totals report (Adjudication Totals From Network)

At the end of the day, the **Network Totals** report shows the real-time totals for the third party plans. The **Pharmacy Day End** report and **Network Totals** report should balance.

You are prompted to generate the **Network Totals** report after the **Pharmacy End of Day** report is generated.

Adjudication Totals From Network

ReportParameters
Adjudication Date - 10/09/2014

Adjudication Totals From Network — Printed on: 10/09/2014 16:33:51

Code	Plan Name	Claims Amount	#	Same Day Reversals Amount	#	Prior Day Reversals Amount	#	Net Amount
AHE	Assure Health (SHNS)	Failed to get totals: Could not connect to IP Address: Port:6180□Error: WinSock Error: 1110						
Total		0.00	0	0.00	0	0.00	0	0.00

Common weekly reports

This section outlines the most commonly used weekly reports.

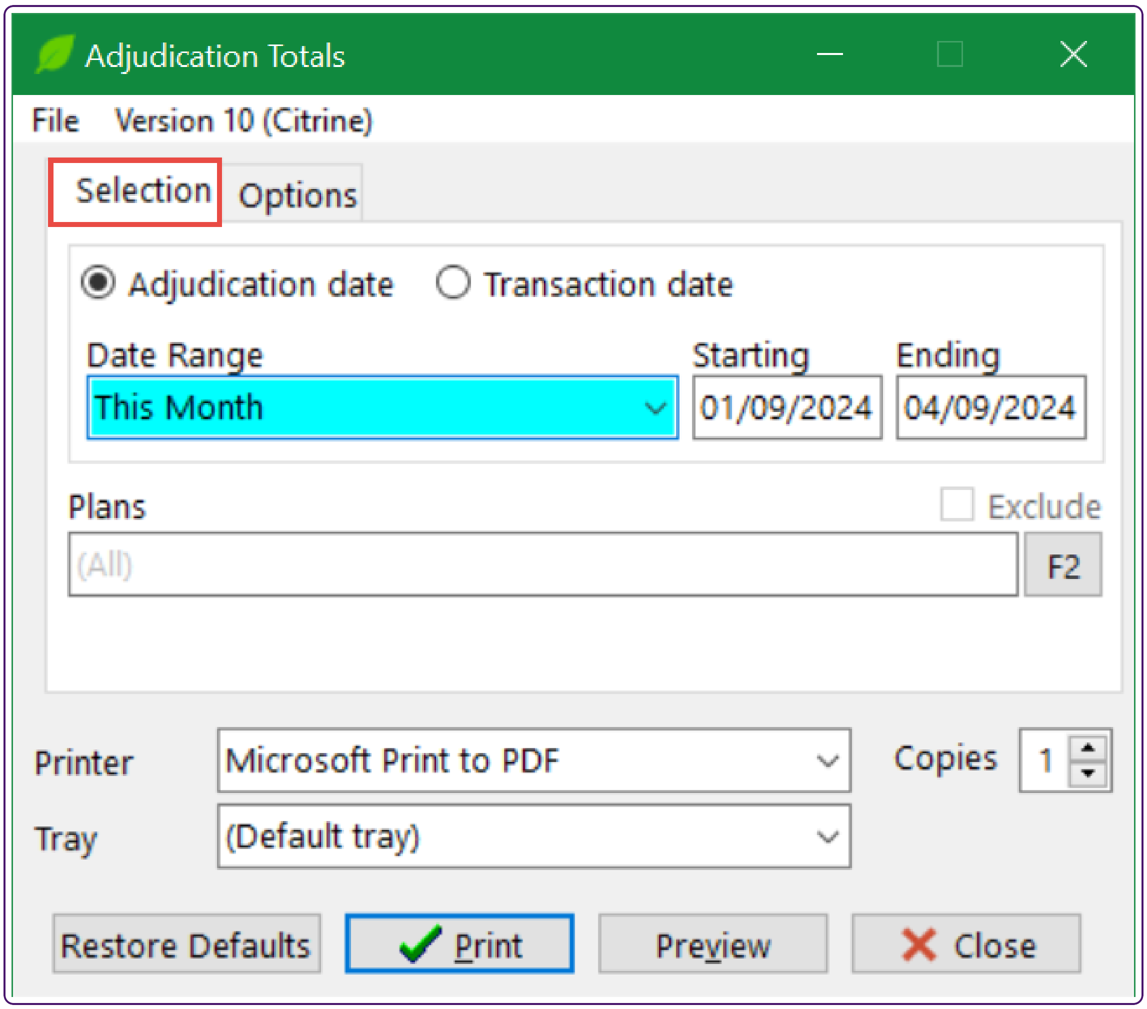
Adjudication Totals report

The **Adjudication Totals** report shows the amounts Kroll has recorded as being paid by third parties. Unlike the **Network Totals** report, the **Adjudication Totals** report does not communicate in real time to the third party plans.

1. From the menu, select **Reports** > **Rx** > **Adjudication Totals**.

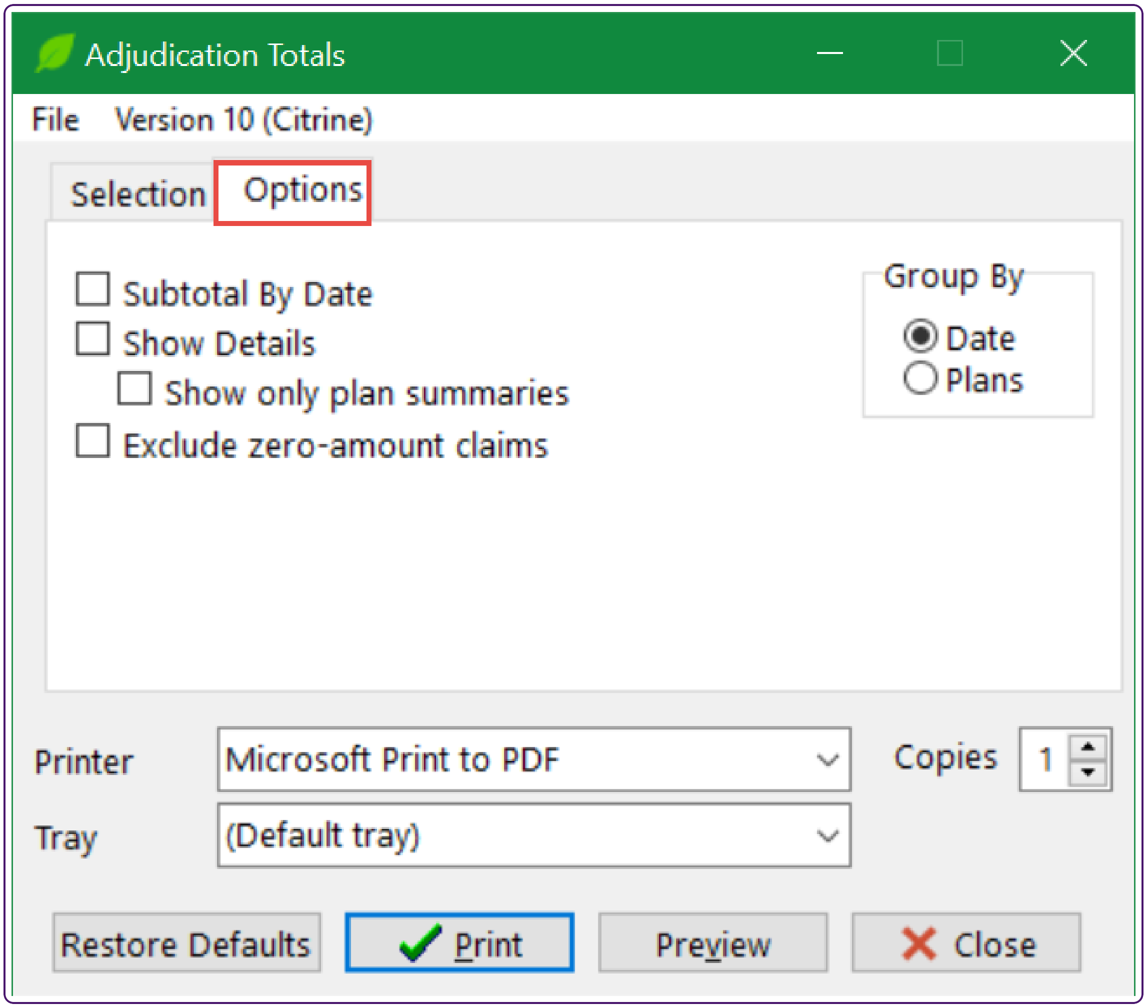
   The **Adjudication Totals** report form is displayed.

2. On the **Selection** tab, use the **Date Range**, **Starting**, and **Ending** fields to specify a date range.



3. To select the plans you want included in the report, select the **F2** button next to the **Plans** field.

4. Select the **Options** tab to specify the report parameters.



5. Use the **Group By** options to specify how the report will be organized.

6. Click **Preview** to preview the report or **Print** to generate a printout of the report.

Adjudication Totals Report
Kroll Pharmacy, 220 Duncan Mill Road, Toronto ON
Phone: (416) 383-1010 Fax: (416) 383-0001

ReportParameters
Adjudication Date -10/09/2014 to 10/09/2014
Group by plan
AdjudicationTotals Report
Adjudication Date - 10-Sept-2014 to 10-Sept-2014

Printed on: 10/09/2014 12:06:38

ManualBilledClaimsSummary

Plans Name	Claims Amount	#	Same Day Reversals Amount	#	Prior Day Reversals Amount	#	Net Amount

GrandTotal

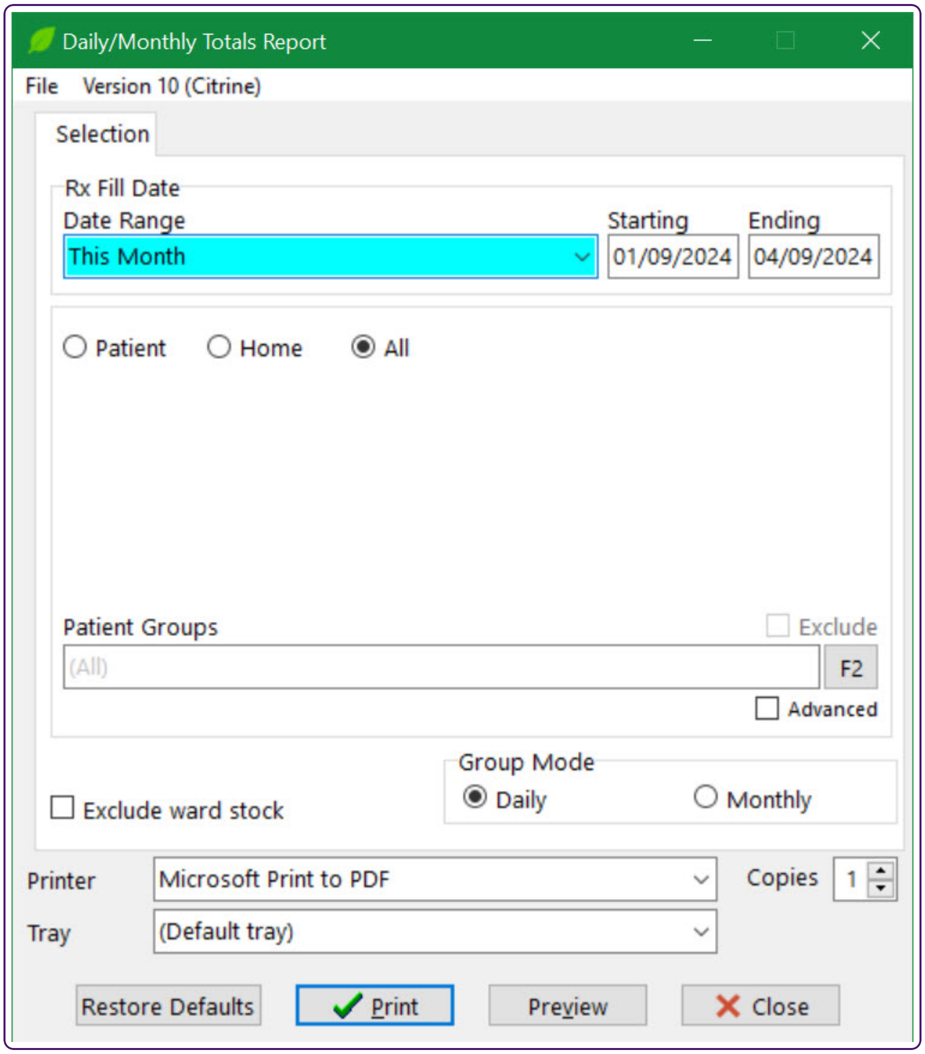
Plans Name	Claims Amount	#	Same Day Reversals Amount	#	Prior Day Reversals Amount	#	Net Amount
Assure Health (AHE)	1,713.49	36	0.00	0	8.42	1	1,705.07
Assure Health (AHE2)	10.84	1	0.00	0	0.00	0	10.84
Claims Secure (RxPlus) (CS)	11.38	1	0.00	0	0.00	0	11.38
ESI Canada (ESI)	872.70	15	163.05	3	0.00	1	709.65
Green Shield Canada (GS)	49.35	5	4.11	1	0.00	0	45.24
Indian Affairs (NIHB) (IA)	348.43	9	0.00	0	0.00	0	348.43
Johnson Inc. (JOH)	83.80	1	0.00	0	0.00	0	83.80
ODB (ODB)	4,047.46	79	48.82	2	0.00	0	3,998.64
Workers Safety Insurance Board (WCB)	79.77	1	0.00	0	0.00	0	79.77
Adjudicated Claims	7,217.22	148	215.98	6	8.42	2	6,992.82
Paper Claims	0.00	0	0.00	0	0.00	0	0.00
Manual Billed Claims	0.00	0	0.00	0	0.00	0	0.00
Net Third Party	7,217.22	148	215.98	6	8.42	2	6,992.82
Cash	1,695.93	87	114.28	3	46.15	3	1,535.50
Total	8,913.15	235	330.26	9	54.57	5	8,528.32

Daily/Monthly Totals report

The **Daily/Monthly Totals** report summarizes the total dollar values for the date range specified on either grouping them daily or monthly based on your selections in the report. It is important to note that this is a fill-based report, meaning it will only reconcile with other fill- based reports.

1. From the menu, select **Reports** > **Rx** > **Daily/Monthly Totals Report**.

   The **Daily/Monthly Totals Report** form is displayed.



2. Use the **Date Range**, **Starting**, and **Ending** fields to specify a date range.
3. Optionally select the **F2** button next to the **Patient Groups** field to select the patient groups you want included in the report.
4. To generate the report for specific patients only, select the **Patient** button and select **Add**. Search for and select each patient you want included in the report.
5. To generate the report for specific nursing homes only, select the **Home** button and select **Add**. Select the **Home** and applicable **Ward** and select **OK**.

   Repeat this step for each home you want to include in the report.

6. Select **Preview** to preview the report or **Print** to generate a printout of the report.

Daily/Monthly Totals Report
Kroll Pharmacy, 220 Duncan Mill Road, Toronto ON
(416) 383-1010 Fax: (416) 383-0001

ReportParameters
Fill Date - 01/01/2014 to 15/01/2014

Daily/Monthly TotalsReport
Printed on: 10/09/2014 13:31:55

Date	A.A.C.	Eff.Markup	Fee	Total	New	Repeat	Total
01-Jan-2014	938.42	68.35	288.36	1295.13	32	2	34
02-Jan-2014	8986.14	800.01	1396.51	11182.66	80	110	190
Reversals	46.23	7.39	19.98	73.60	1	1	2
Net	8939.91	792.62	1376.53	11109.06	79	109	188
03-Jan-2014	2478.69	193.21	521.09	3192.99	29	41	70
Reversals	84.99	13.60	4.00	102.59	1	0	1
Net	2393.70	179.61	517.09	3090.40	28	41	69
04-Jan-2014	2990.26	243.72	484.57	3718.55	34	29	63
Reversals	29.97	2.15	9.99	42.11	1	0	1
Net	2960.29	241.57	474.58	3676.44	33	29	62
05-Jan-2014	12007.65	968.98	1641.93	14618.56	147	93	240
Reversals	86.38	5.96	7.00	99.34	0	1	1
Net	11921.27	963.02	1634.93	14519.22	147	92	239
06-Jan-2014	7103.09	604.02	1269.29	8976.40	120	47	167
Reversals	218.98	27.18	36.98	283.14	2	1	3
Net	6884.11	576.84	1232.31	8693.26	118	46	164
07-Jan-2014	9307.75	828.93	1513.06	11649.74	115	92	207
08-Jan-2014	15296.08	825.96	2505.65	18627.69	150	278	428
Reversals	169.31	19.23	36.97	225.51	1	3	4
Net	15126.77	806.73	2468.68	18402.18	149	275	424
09-Jan-2014	7525.35	409.65	1437.80	9372.80	101	99	200
Reversals	467.16	-230.22	14.99	251.93	3	0	3
Net	7058.19	639.87	1422.81	9120.87	98	99	197
10-Jan-2014	3278.58	298.39	684.59	4261.56	52	35	87
Reversals	10.39	1.66	19.99	32.04	0	1	1
Net	3268.19	296.73	664.60	4229.52	52	34	86
11-Jan-2014	2445.16	275.25	567.28	3287.69	40	31	71
Reversals	1.46	0.10	5.00	6.56	0	1	1
Net	2443.70	275.15	562.28	3281.13	40	30	70
12-Jan-2014	14276.92	1208.45	1457.47	16942.84	110	93	203
Reversals	1566.46	236.84	34.97	1838.27	2	2	4
Net	12710.46	971.61	1422.50	15104.57	108	91	199
13-Jan-2014	8671.02	746.45	1154.39	10571.86	91	74	165
Reversals	4.75	0.37	5.00	10.12	0	1	1
Net	8666.27	746.08	1149.39	10561.74	91	73	164
14-Jan-2014	7527.89	618.24	1054.67	9200.80	81	57	138
15-Jan-2014	10195.42	1022.05	1291.23	12508.70	102	64	166
Reversals	106.93	16.00	29.97	152.90	1	2	3
Net	10088.49	1006.05	1261.26	12355.80	101	62	163
ForwardTotals	113028.42	9111.66	17267.89	139407.97	1284	1145	2429
ReversedTotals	2793.01	100.26	224.84	3118.11	12	13	25
NetTotals	110235.41	9011.40	17043.05	136289.86	1272	1132	2404
AverageTotals	45.85	3.75	7.09	56.69			

Plan Summary report

The **Plan Summary** report summarizes the total dollar values, including cash, generated for all plans within a specified date range.

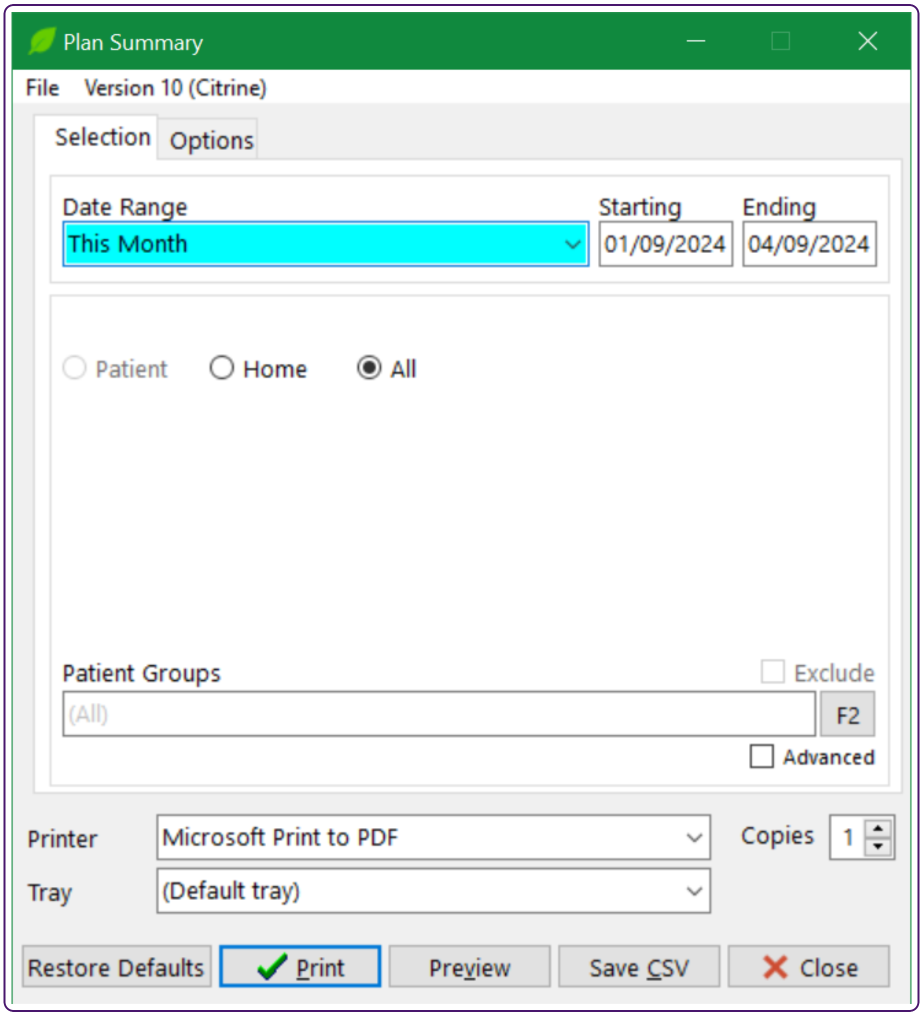
1. From the menu, select **Reports** > **Rx** > **Plan Summary**.

   The **Plan Summary Report** form is displayed.

2. Use the **Date Range**, **Starting**, and **Ending** fields to specify a date range.

3. Optionally select the **F2** button next to the **Patient Groups** field to select the patient groups you want included in the report.
4. To generate the report for specific nursing homes only, select the **Home** button and select **Add**. Select the **Home** and applicable **Ward** and select **OK**.

   Repeat this step for each home you want to include in the report.



5. Select **Preview** to preview the report or **Print** to generate a printout of the report.

Plan Summary Report
Kroll Pharmacy, 220 Duncan Mill Road, Toronto ON
(416) 383-1010 Fax: (416) 383-0001

ReportParameters
Fill Date - 15/01/2014 to 30/01/2014
Group Rxs by First Paying Plan

Plan Summary Report

Printed on: 25/09/2014 13:41:13

Code	Plan Name	A.A.C.	Effective Markup	Markup %	Fees	Total	G.P. $	G.P. %	Pat.Pays	Billed	New	Repeat	Total	Scndry
AHE	AssureHealth	23883.97	2742.53	11.48	3439.21	30065.71	6181.74	20.56	2699.21	27625.40	233	166	399	100
Prior Day Reversals		53.93	7.52	13.94	29.97	91.42	37.49	41.01	77.96	13.46	3	0	3	0
Net		23830.04	2735.01	11.48	3409.24	29974.29	6144.25	20.50	2621.25	27611.94	230	166	396	100
AHE2	AssureHealth	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	26.37	0	0	0	2
BC	Ontario Blue Cross	337.29	47.29	14.02	89.91	474.49	137.20	28.92	99.40	411.75	5	4	9	17
CASH	Cash	10550.06	1696.65	16.08	4148.79	16395.50	5845.44	35.65	16395.50	0.00	333	156	489	720
Prior Day Reversals		231.89	37.11	16.00	49.95	318.95	87.06	27.30	318.95	0.00	1	4	5	2
Net		10318.17	1659.54	16.08	4098.84	16076.55	5758.38	35.82	16076.55	0.00	332	152	484	718
CS	Claims Secure (RxPlus)	3614.98	386.79	10.70	669.33	4671.10	1056.12	22.61	419.32	4286.84	47	20	67	11
ESI	ESI Canada	8348.74	935.00	11.20	1793.01	11076.75	2728.01	24.63	786.15	10330.38	127	64	191	39
GS	Green Shield Canada	3510.20	293.29	8.36	399.60	4203.09	692.89	16.49	196.27	4120.24	30	10	40	28
IA	Indian Affairs (NIHB)	2309.03	-51.00	-2.21	460.95	2718.98	409.95	15.08	0.00	2784.08	37	19	56	18
JOH	Johnson Inc.	564.50	90.33	16.00	109.89	764.72	200.22	26.18	208.10	556.62	7	4	11	9
MDM	MDM	80.34	5.69	7.08	19.98	106.01	25.67	24.21	22.34	83.67	2	0	2	0
ODB	ODB	53898.46	2799.94	5.19	7586.95	64285.35	10386.89	16.16	2013.21	61603.20	629	758	1387	3
VET	Ontario Blue Cross Ve...	114.10	0.00	0.00	28.00	142.10	28.00	19.70	0.00	235.75	1	3	4	22
WCB	Workers Safety Insura...	1489.62	184.73	12.40	126.00	1800.35	310.73	17.26	0.00	1800.35	13	5	18	22
Unadjudicated amount not included in Billed totals above											0.00			
Grand Totals		108701.29	9131.24	8.40	18871.62	136704.15	28002.86	20.48	22839.50	113864.65	1464	1209	2673	991
ReversedTotals		285.82	44.63	15.61	79.92	410.37	124.55	30.35	396.91	13.46	4	4	8	2
Net Totals		108415.47	9086.61	8.38	18791.70	136293.78	27878.31	20.45	22442.59	113851.19	1460	1205	2665	989

This report should be used for demographic purposes only. The new/refill counts and dollar values above have been attributed to the first paying plan of each prescription and the report is based on fill date, not adjudication date. Therefore, **do not use this report to reconcile your third party claims** - use the Adjudication Totals Report.

Other common reports

This section outlines some other commonly used reports.

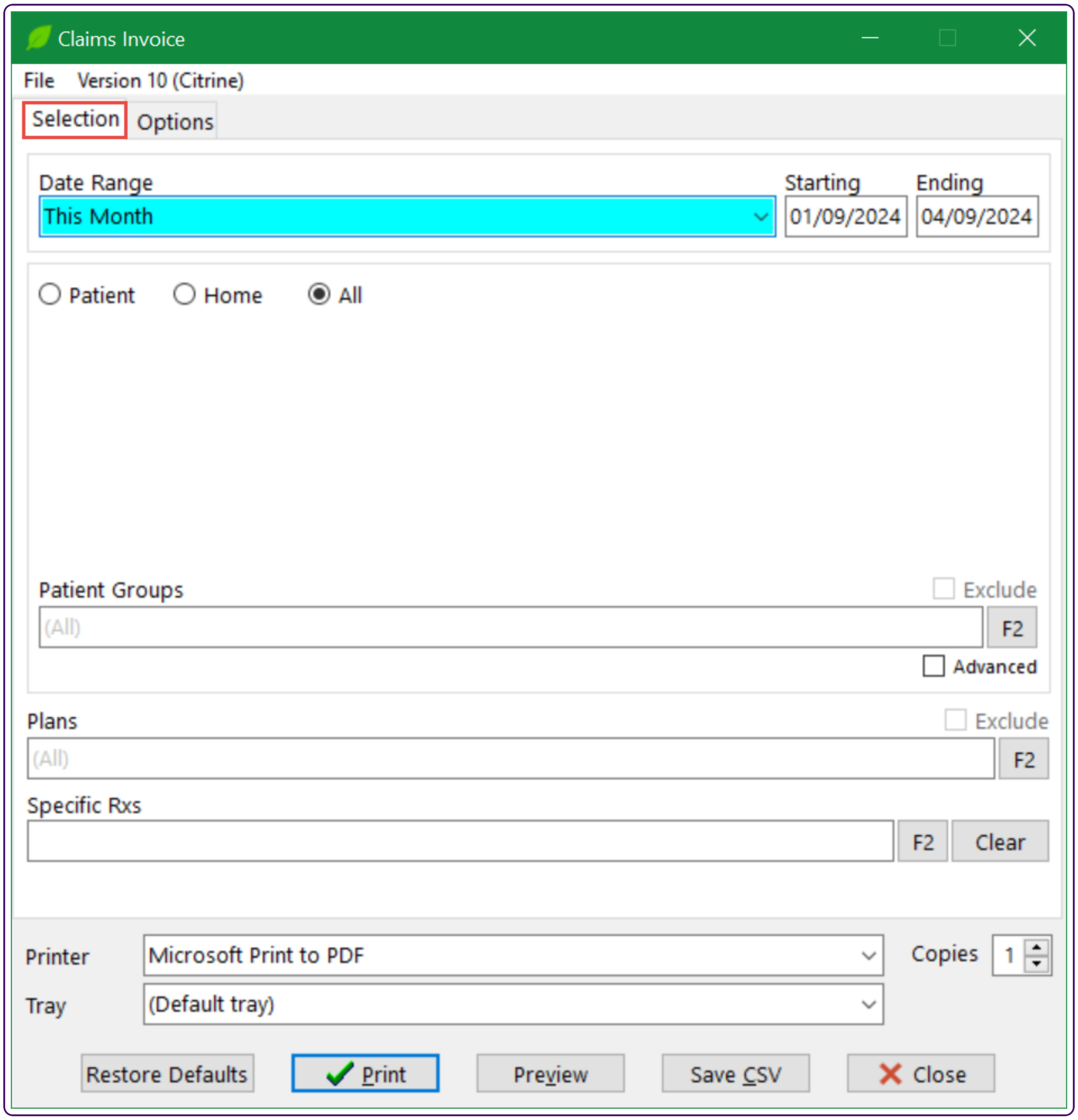
Claims Invoice report

The **Claims Invoice** report captures the prescriptions filled to non-real time plans (i.e., manual billing plans).

1. From the menu, select **Reports** > **Rx** > **Claims Invoice**.

   The **Claims Invoice** report form is displayed.

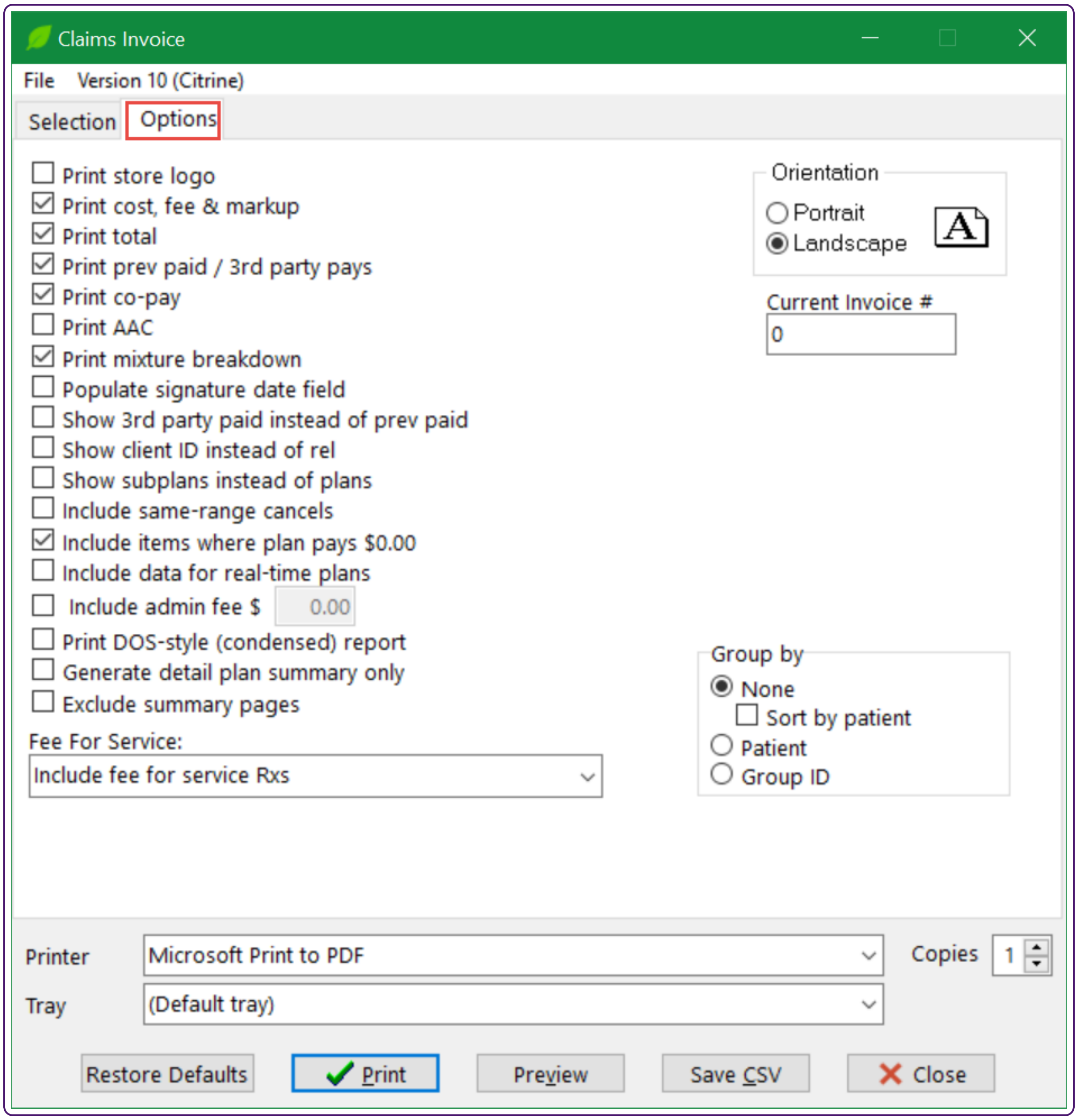
2. Use the **Date Range**, **Starting**, and **Ending** fields to specify a date range.



3. To select the patient groups you want included in the report, select the **F2** button next to the **Patient Groups** field.
4. To generate the report for specific patients only, select the **Patient** button and select **Add**, then search for and select each patient you want to include.
5. To generate the report for specific nursing homes only, select the **Home** button and select **Add**. Select the **Home** and applicable **Ward** and select **OK**.

   Repeat this step for each home you want to include on the report.

6. Select the **Options** tab to specify the report parameters.



7. Use the **Group by** options to specify how the report will be organized.

8. Select the following checkboxes:
   - **Print cost, fee & markup**: required when manually submitting to a plan for payment.
   - **Print total**: the total must be provided to the plan.
   - **Print prev paid/3rd party pays**: needed for a manual bill plan if a previous online plan has paid part of the claim.
   - **Print co-pay**: needed for the manual bill plan if there is a pre-set deductible for that plan.

     For example, the manual plan might pay 80% and the patient 20%.
   - **Show subplans instead of plans**: includes manual bill plans that are part of other plans.

     For example, a manual bill plan created under the Assure plan, is a sub plan of Assure.
   - **Include same-range cancels**: if the prescription has been cancelled and then rebilled, the cancel for the initial number and the rebill with the new Rx number are both displayed.
   - **Include items where plan pays $0.00**: includes manually billed plans.
   - **Include data for real-time plans**: includes data from real time plans that may have paid a portion of the prescription previously or were set to bill manually.

9. Select **Preview** to preview the report or **Print** to print it.

Claim Invoice Report
Kroll Pharmacy, 220 Duncan Mill Road, Toronto ON
(416) 383-1010 Fax: (416) 383-0001

ReportParameters
Adjudication Date - 26/09/2014 to 26/09/2014
Showing subplans rather than plans
Plans - Manual Plan

Claim Invoice Report — Printed on: 26/09/2014 12:13:05

Manual Plan (MANU)

Claims

Rx #	Patient Name / Doctor / Cardholder	Birthdate	AAC / Qty Drug / Client ID Billing #	Cost	Markup	Fee	Total / DIN	3rd Prty / Co-pay / SA #	Net / Fill Date / Mfr
1154126	Kroll, Tony Smith,A.J.M.	19-Jan-1967	18.75 30 TAB Apo-Simvastatin 40mg 123456 123456	21.75	0.00	10.99	32.74 02247014	32.74 0.00	32.74 26-Sep-2014 APX
Totals			18.75	21.75	0.00	10.99	32.74	32.74 0.00	32.74

The second page of the printed report shows the total number of Rxs billed and reversed, and the net amounts due. It also includes the cost, markup, fee total, copay, and third party amounts. This is typically kept for pharmacy records.

Claim Invoice Report
Kroll Pharmacy, 220 Duncan Mill Road, Toronto ON
(416) 383-1010 Fax: (416) 383-0001

ReportParameters
Adjudication Date - 26/09/2014 to 26/09/2014
Showing subplans rather than plans
Plans - Manual Plan

Claim Invoice Report — Printed on: 26/09/2014 12:13:05

Manual Plan (MANU)

Plan Summary

Forward Rxs		Reversed Rxs		Net Rxs	
# of Rxs:	1	# of Rxs:	0	# of Rxs:	1
AAC:	18.75	AAC:	0.00	AAC:	18.75
Cost:	21.75	Cost:	0.00	Cost:	21.75
Markup:	0.00	Markup:	0.00	Markup:	0.00
Fee:	10.99	Fee:	0.00	Fee:	10.99
Total:	32.74	Total:	0.00	Total:	32.74
3rd Prty:	32.74	3rd Prty:	0.00	3rd Prty:	32.74
Co-pay:	0.00	Co-pay:	0.00	Co-pay:	0.00
Net:	32.74	Net:	0.00	Net:	32.74

I hereby certify that the above is a true account of services rendered in compliance with the terms of the agreement between this pharmacy and the above Carrier/Agency.

Pharmacist's Signature — September 26, 2014 — Date

The last page is the **Report Summary**. This page is typically kept by the pharmacy to track what they have submitted.

Claim Invoice Report
Kroll Pharmacy, 220 Duncan Mill Road, Toronto ON
(416) 383-1010 Fax: (416) 383-0001

ReportParameters
Adjudication Date - 26/09/2014 to 26/09/2014
Showing subplans rather than plans
Plans - Manual Plan

Claim Invoice Report — Printed on: 26/09/2014 12:13:05

Report Summary

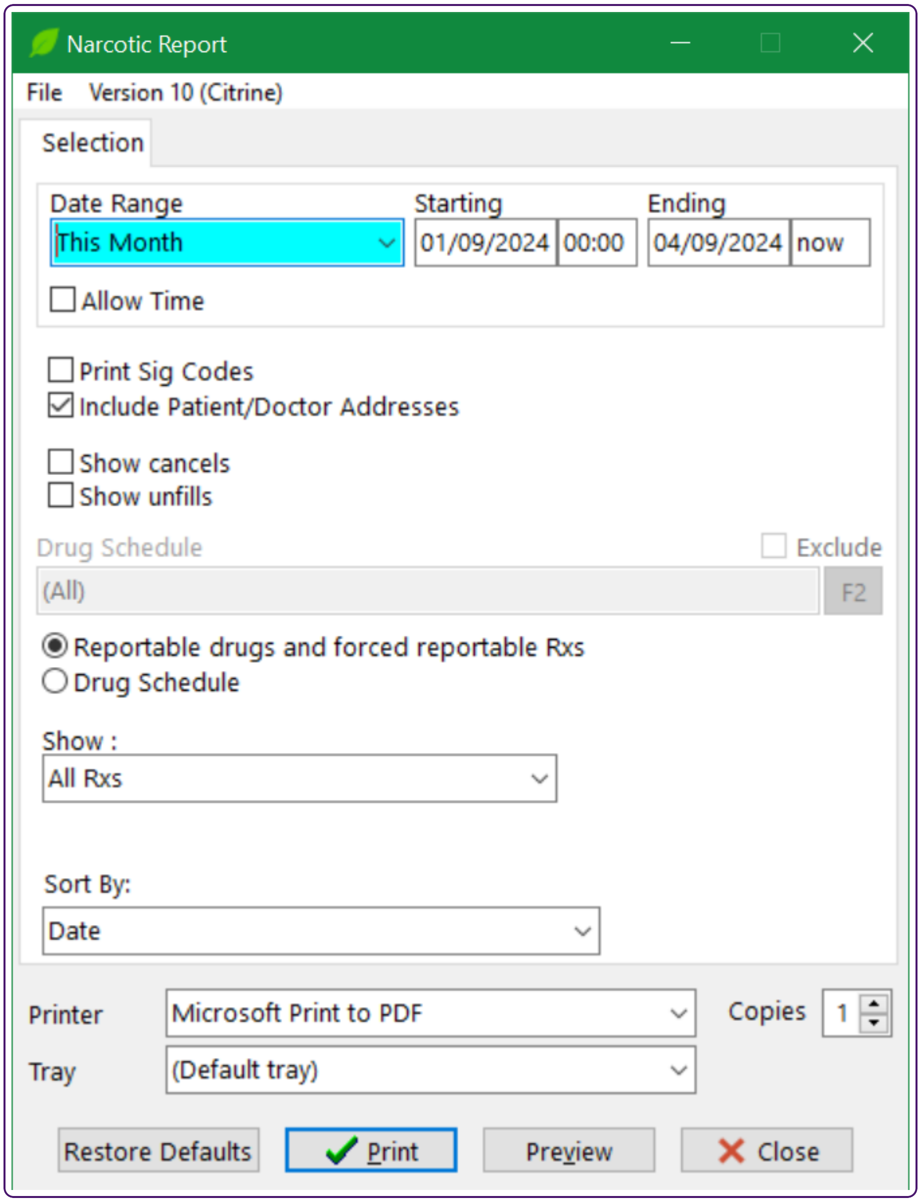
Plan Name	A.A.C.	Cost	Markup	Fee	Total	3rd Prty	Co-pay	Net	Claims
Manual Plan (MANU)	18.75	21.75	0.00	10.99	32.74	32.74	0.00	32.74	1
Total Forwards	18.75	21.75	0.00	10.99	32.74	32.74	0.00	32.74	1
Total Reversals	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0
Total Net	18.75	21.75	0.00	10.99	32.74	32.74	0.00	32.74	1

Narcotic report

The **Narcotic** report is used to track the reportable and forced reportable drugs that have been dispensed by the pharmacy.

1. From the menu, select **Reports** > **Drug** > **Narcotic Report**.

   The **Narcotic Report** form is displayed.



2. Use the **Date Range**, **Starting**, and **Ending** fields to specify a date range.
3. To add drug schedules to the report, select the **F2** button next to the **Drug Schedule** field.

4. Use the **Show** drop-down list to specify if you want the report to show all Rxs, or only those Rxs with or without doctor authorization.
5. Use the **Sort By** drop-down list to change how the report is sorted.
6. Select **Preview** to preview the report or **Print** to print it.

Narcotic Report
Kroll Pharmacy, 220 Duncan Mill Road, Toronto ON
Phone: (416) 383-1010 Fax: (416) 383-0001

ReportParameters
Fill Date - 26/09/2014 to 26/09/2014
Print Sig Codes
Show reportables and forced reportable Rxs
Sort by Date

NarcoticReport — Printed on: 26/09/2014 13:39:38

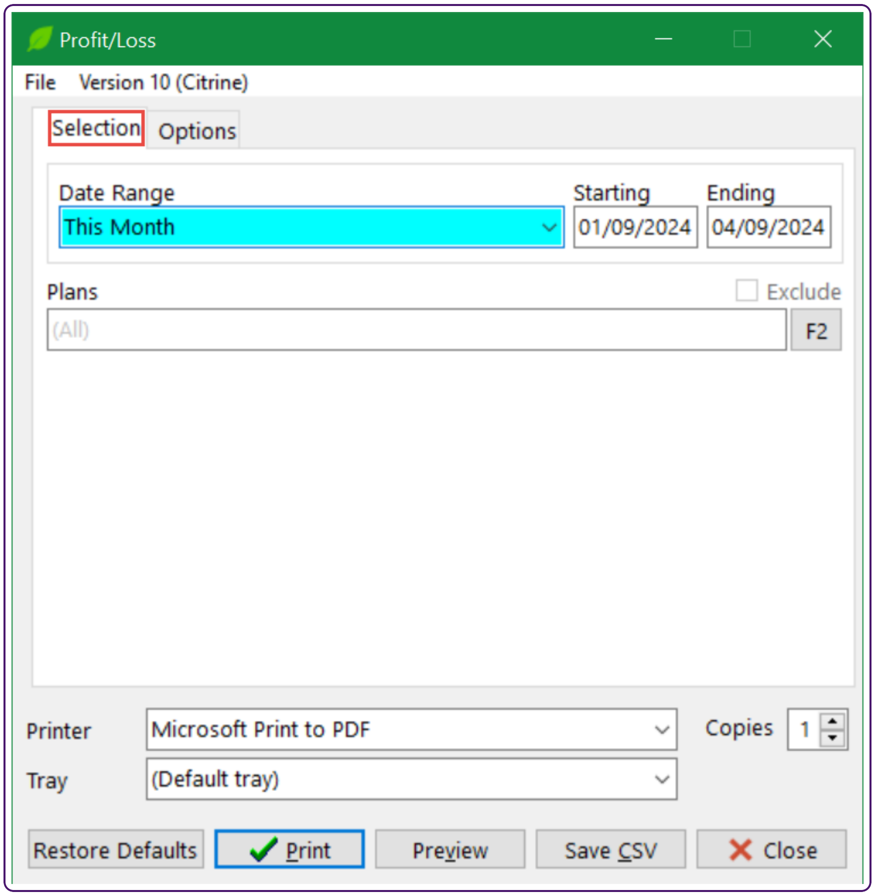
Fill Date Status / Sig Part Fill Orig. Rx	Tx	Init	W/O	Qty	Drug DIN/ReportableComponent	Patient Address	Doctor Address
26-Sep-14 Filled / AS DIRECTED	9010590	DL	W	1	AER Methadone Test 3 0.990 GM Methadone Pd	Test, John ON	Dr. Smith, A.J.M. Bgh Belleville ON
26-Sep-14 Filled / AS DIRECTED Part Fill of Rx#: 9010591	9010591	DL		1	AER Methadone Test 3 0.010 GM Methadone Pd	Test, John ON	Dr. Smith, A.J.M. Bgh Belleville ON
26-Sep-14 Filled / AS DIRECTED	9010592	DL	W	30	TAB Dilaudid 2mg 00125083	Test, John ON	Dr. Smith, A.J.M. Bgh Belleville ON
26-Sep-14 Filled / AS DIRECTED	9010593	DL	W	1	ML Metadol-D 10mg 02244290	Test, John ON	Dr. Smith, A.J.M. Bgh Belleville ON
26-Sep-14 Filled / AS DIRECTED	9010594	DL	W	100	TAB Oxycontin 10mg 02202441	Test, John ON	Dr. Smith, A.J.M. Bgh Belleville ON
26-Sep-14 Filled / TAKE 1 CAPSULE 4 TIMES A DAY	9010596	DL	W	120	CAP Kadian 20mg 02184435	Test, Phil Belleville ON	Dr. Jones, Barnaby 55 Dundast Street Toronto ON M1P 2J4

Profit/Loss report

The **Profit/Loss** report is used to identify profit and loss margins. You can print this report for all Rxs for a specific profit and loss amount or percentage, within a specific date range. It also shows discounts applied during the adjudication process.

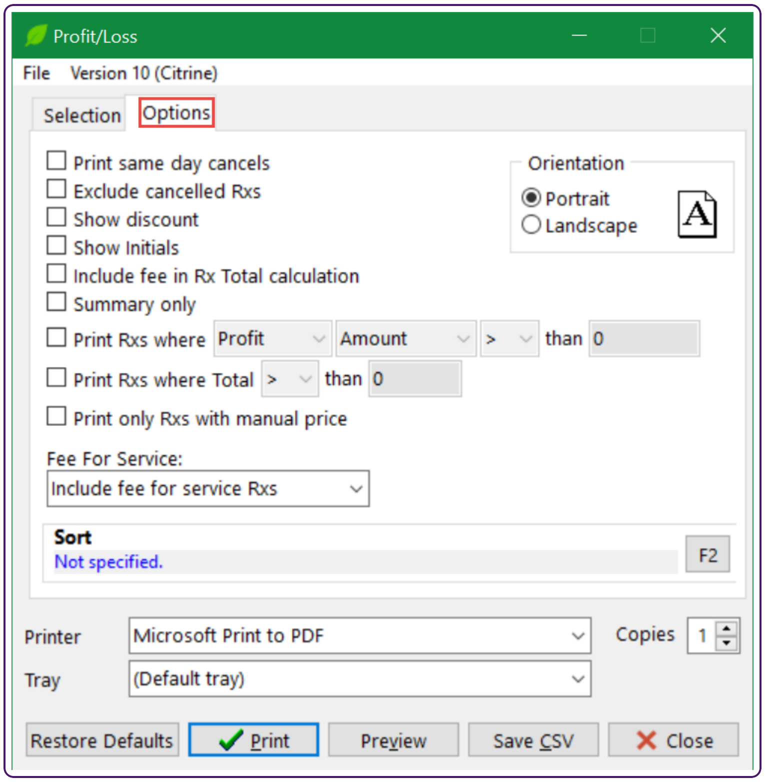
1. From the menu, select **Reports** > **Rx** > **Profit/Loss**.

   The **Profit/Loss** report form is displayed.

2. Use the **Date Range**, **Starting**, and **Ending** fields to specify a date range.
3. Use the **F2** button next to the **Plans** field to select the plans you want to include in the report.

4. Select the **Options** tab to specify the report parameters.



5. Select the following checkboxes, as applicable:
   - **Print same day cancels**: includes Rxs that were cancelled the same day they were filled.
   - **Exclude cancelled Rxs**: excludes cancelled Rxs from the report.
   - **Show discount**: includes discounts applied to prescriptions during the adjudication process.
   - **Show Initials**: includes the initials of the user who filled the prescription.
   - **Include fee in Rx Total calculation**: includes the fee in the total $ calculations.
   - **Summary only**: prints a summary (no details) of the options enabled.
   - **Print Rxs where** Profit Amount > **than** #: opens up fields to include profile, loss or discounts, amounts or percentages that are >, <, =, >=, or <= than a specific dollar amount.
   - **Print Rxs where Total** > **than** 0: includes Rxs where the total is >, <, =, >=, <= the specified dollar amount.
   - **Print only Rxs with manual price**: includes only those prescriptions that have been set up with a manual price override.
6. Optionally change the **Fee For Service** selection.

7. Select **Preview** to preview the report or **Print** to print it.

Profit/Loss Report

Kroll Pharmacy, 220 Duncan Mill Road, Toronto ON
(416) 383-1010 Fax: (416) 383-0001

ReportParameters
Fill/Cancel Date - 26/09/2014 to 26/09/2014
Print where profit amount > 0.00
Print where Rx Total > 0.00

Profit/LossReport — Printed on: 26/09/2014 13:46:38

Date	Rx#	Initials	Plan(s)	Drug Name	Qty	Rx Total	Discount	A.A.C.	$Net	G.P.%
26-Sep-2014	1154126	DL	MANU	Apo-Simvastatin 40mg	30	21.75	0.00	18.75	3.00	13.79
26-Sep-2014	1154129	DL	ESI/AHE	Apo-Simvastatin 40mg	30	21.75	7.19	18.75	3.00	13.79
26-Sep-2014	1154130	DL	BC/Cash	Slow Fe 160mg	60	18.56	4.39	16.00	2.56	13.79
26-Sep-2014	1154131	DL	BC/Cash	Apo-Pravastatin 10mg	30	28.19	6.79	24.30	3.89	13.80
26-Sep-2014	9010590	DL	Cash	Methadone Test 3	1	16.83	0.00	14.51	2.32	13.78
26-Sep-2014	9010591	DL	ONNMS/Cash	Methadone Test 3	1	0.16	0.00	0.15	0.01	6.25
26-Sep-2014	9010592	DL	ONNMS/Cash	Dilaudid 2mg	30	7.93	0.00	6.84	1.09	13.75
26-Sep-2014	9010593	DL	ONNMS/Cash	Metadol-D 10mg	1	0.35	0.00	0.30	0.05	14.29
26-Sep-2014	9010594	DL	ONNMS/Cash	Oxycontin 10mg	100	89.46	0.00	77.12	12.34	13.79
26-Sep-2014	9010595	DL	ONNMS/Cash	Valium 10mg	90	14.99	0.00	12.92	2.07	13.81
26-Sep-2014	9010596	DL	ESI/AHE/ONNMS/...	Kadian 20mg	120	103.94	0.00	89.60	14.34	13.80
Totals						323.91	18.37	279.24	44.67	13.79

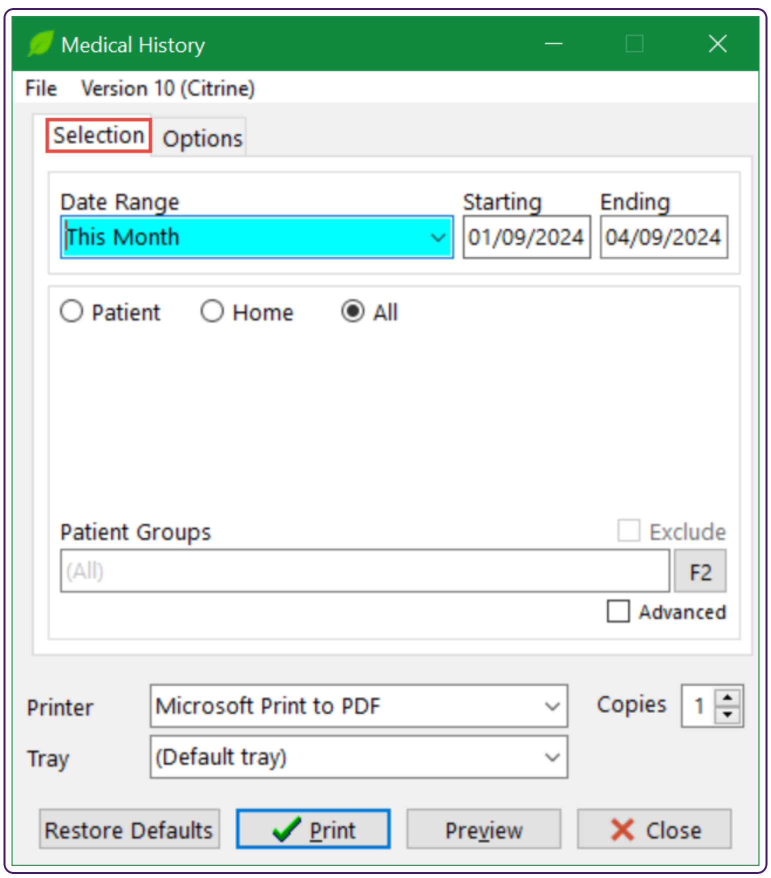
Chapter 29

Medical History report

The **Medical History** report shows the contents of the patient's profile.

1. From the menu, select **Reports** > **Patient** > **Patient Medical History**.

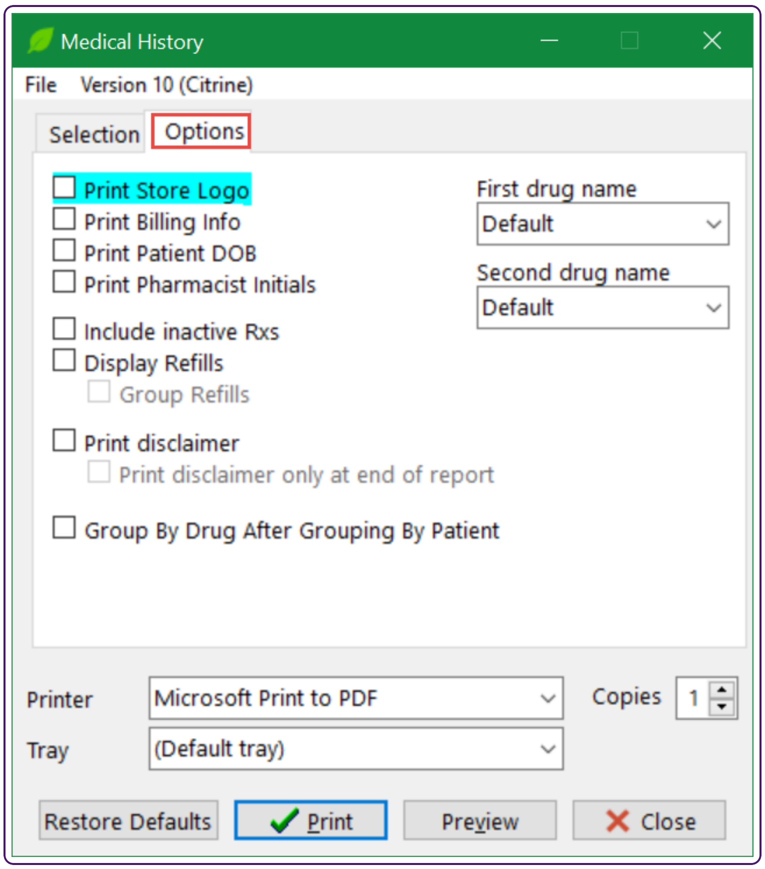
   The **Patient Medical History** report form is displayed.



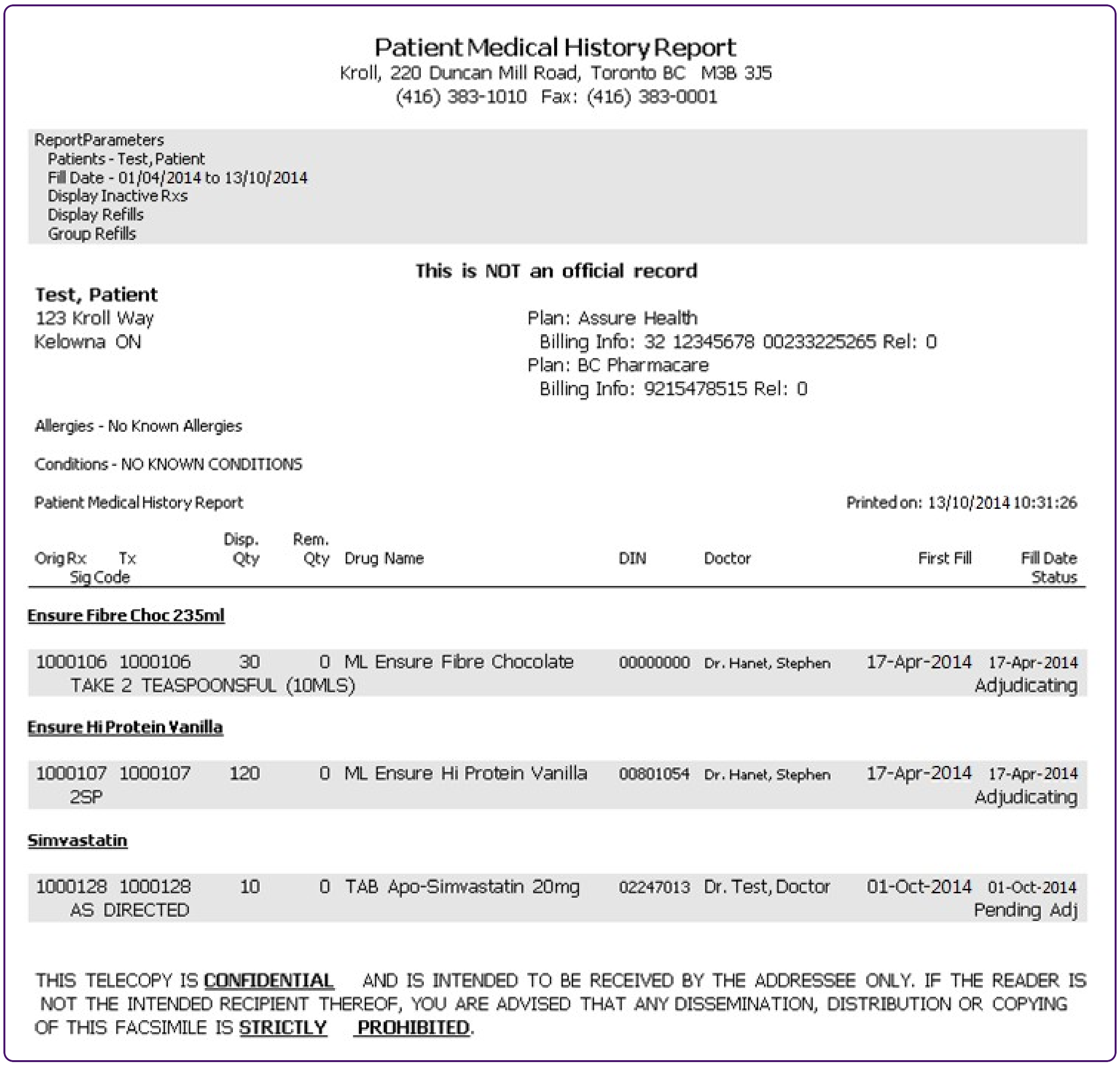
2. Use the **Date Range**, **Starting**, and **Ending** fields to specify a date range.

3. To select the patient groups you want to include in the report, select the **F2** button next to the **Patient Groups** field.
4. To generate the report for specific patients only, select the **Patient** button and select **Add**. Search for and select the patients you want to include in the report.
5. To generate the report for specific nursing homes only, select the **Home** button and select **Add**. Select the **Home** and applicable **Ward** and select **OK**.

   Repeat this step for each home you want to include in the report.
6. Select the **Options** tab to specify the report parameters.



7. Select the following checkboxes, as applicable:
   - **Print Store Logo**: prints the store logo on the report.
   - **Print Billing Info**: includes patient billing information such as the patient plan and billing number.
   - **Include Inactive Rxs**: includes inactive prescriptions.
   - **Display Refills**: select to display refills.
   - **Group Refills**: select to group refills together.
   - **Print disclaimer**: prints a disclaimer at the bottom of every page.
   - **Print disclaimer only at end of report**: prints the disclaimer at the end of the report only.
8. Select **Preview** to preview the report or **Print** to print it.



Patient Medical History Report
Kroll, 220 Duncan Mill Road, Toronto BC M3B 3J5
(416) 383-1010 Fax: (416) 383-0001

ReportParameters
Patients - Test, Patient
Fill Date - 01/04/2014 to 13/10/2014
Display Inactive Rxs
Display Refills
Group Refills

This is NOT an official record

Test, Patient
123 Kroll Way
Kelowna ON

Plan: Assure Health
Billing Info: 32 12345678 00233225265 Rel: 0
Plan: BC Pharmacare
Billing Info: 9215478515 Rel: 0

Allergies - No Known Allergies

Conditions - NO KNOWN CONDITIONS

Patient Medical History Report — Printed on: 13/10/2014 10:31:26

Orig Rx / Sig Code	Tx	Disp. Qty	Rem. Qty	Drug Name	DIN	Doctor	First Fill	Fill Date / Status
Ensure Fibre Choc 235ml								
1000106	1000106	30	0	ML Ensure Fibre Chocolate	00000000	Dr. Hanet, Stephen	17-Apr-2014	17-Apr-2014
TAKE 2 TEASPOONSFUL (10MLS)								Adjudicating
Ensure Hi Protein Vanilla								
1000107	1000107	120	0	ML Ensure Hi Protein Vanilla	00801054	Dr. Hanet, Stephen	17-Apr-2014	17-Apr-2014
2SP								Adjudicating
Simvastatin								
1000128	1000128	10	0	TAB Apo-Simvastatin 20mg	02247013	Dr. Test, Doctor	01-Oct-2014	01-Oct-2014
AS DIRECTED								Pending Adj

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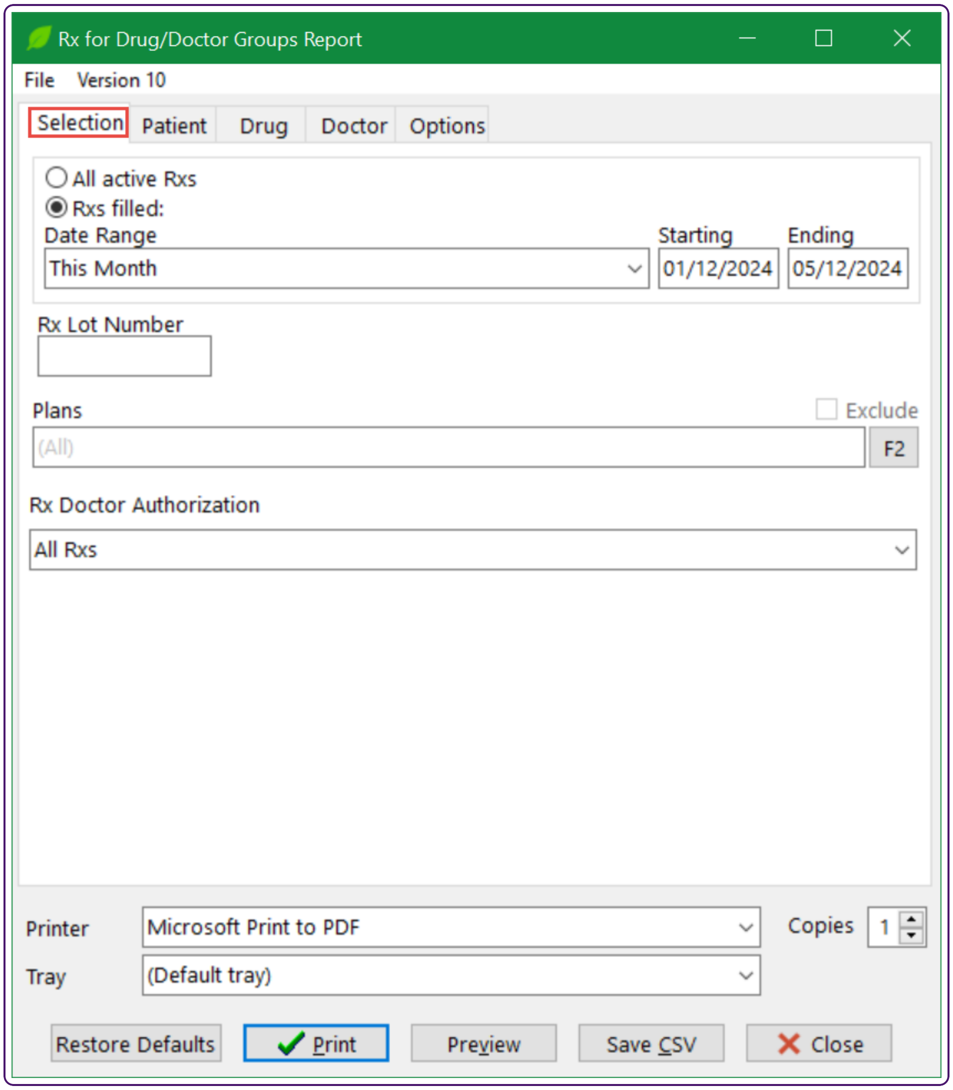
Rx for Drug/Doctor Group Report

The **Rx for Drug/Doctor Groups** report is used to find a particular dispense for a specific drug, doctor, drug group, or doctor group. This report is especially useful for drug recalls.

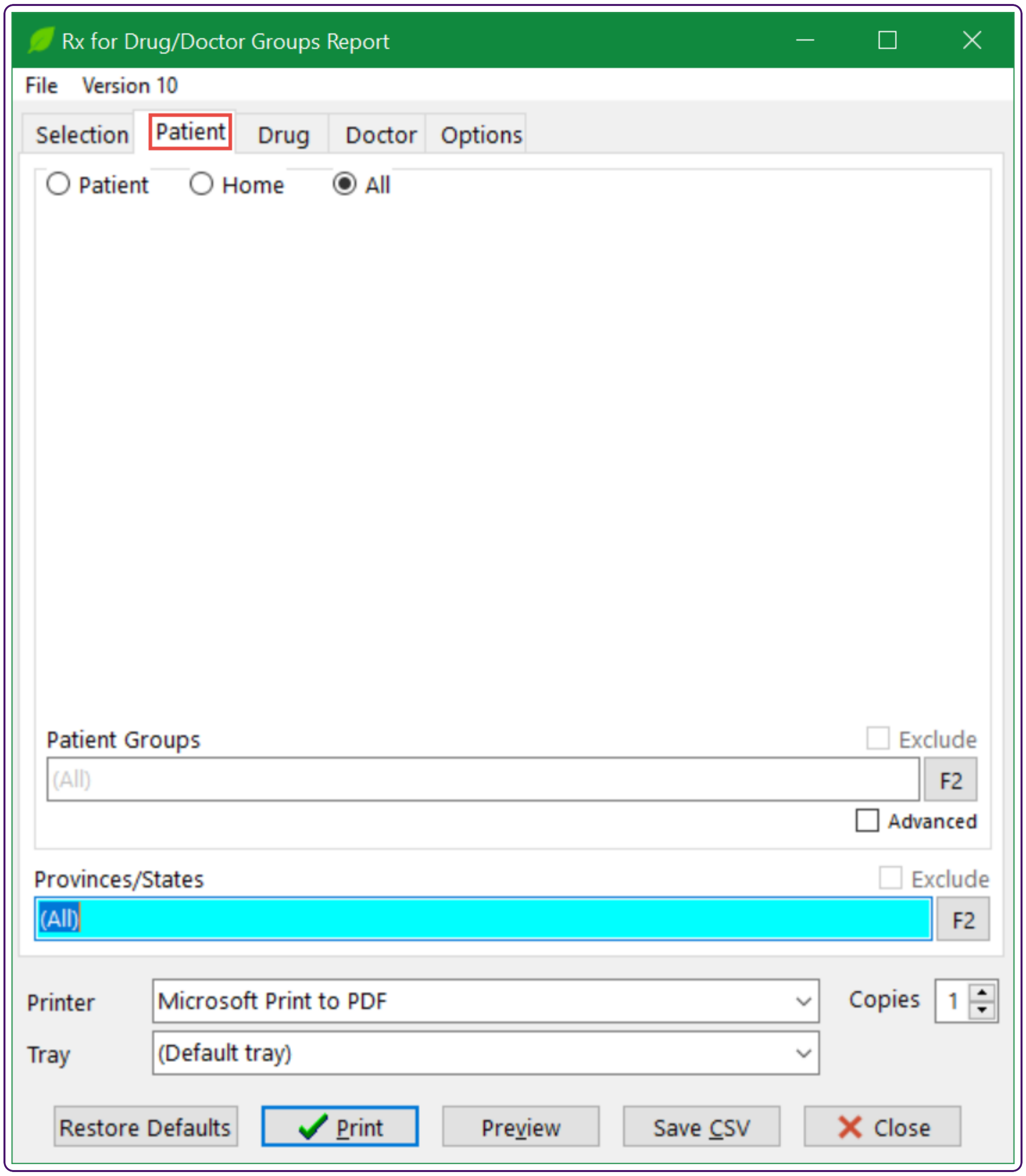
1. From the menu, select **Reports** > **Rx** > **Rx for Drug/Doctor Groups**.

   The **Rx for Drug/Doctor Groups Report** form is displayed.

2. From the **Selection** tab:
   - Select **All active Rxs** to generate the report for all currently active Rxs, or **Rxs filled** to specify a **Date Range**, **Starting** date, and **Ending** date.
   - Optionally use the **Rx Lot Number** field to specify the lot numbers you want to include in the report.
   - Optionally select the **F2** button next to the **Plans** field to select the plans you want to include in the report.



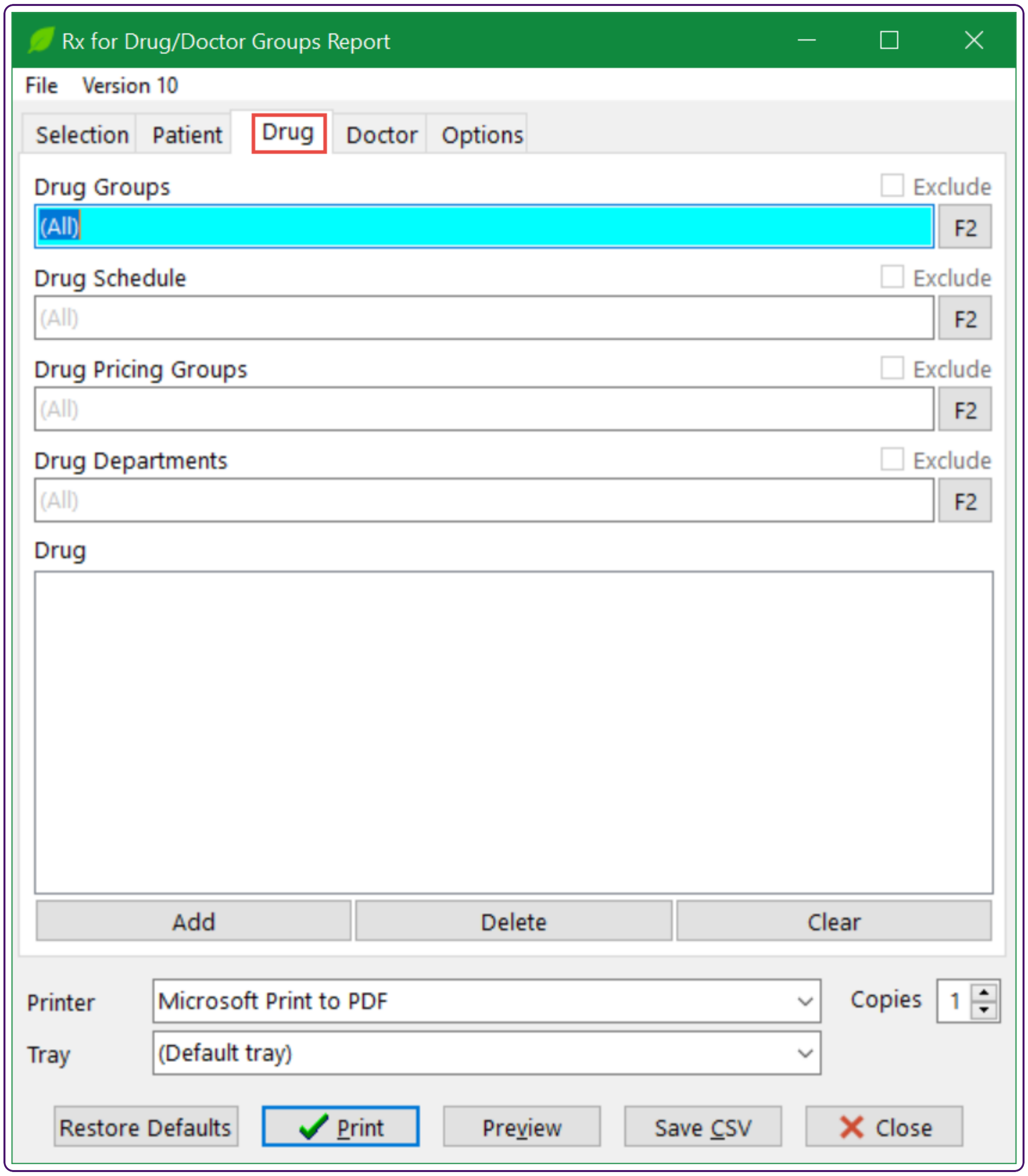
3. From the **Patient** tab:



- To generate the report for specific patients only, select the **Patient** button and click **Add**. Search for and select each patient you want to include in the report.
- To generate the report for specific nursing homes only, select the **Home** button and then select **Add**. Select the **Home** and applicable **Ward** and select **OK**. Repeat this step for each home you want to include in the report.
- Optionally select the **F2** button next to the **Patient Groups** field to select the patient groups you want to include in the report.

- Optionally select the **F2** button next to the **Provinces/States** field to select the provinces or states you want to include in the report.

4. From the **Drug** tab:

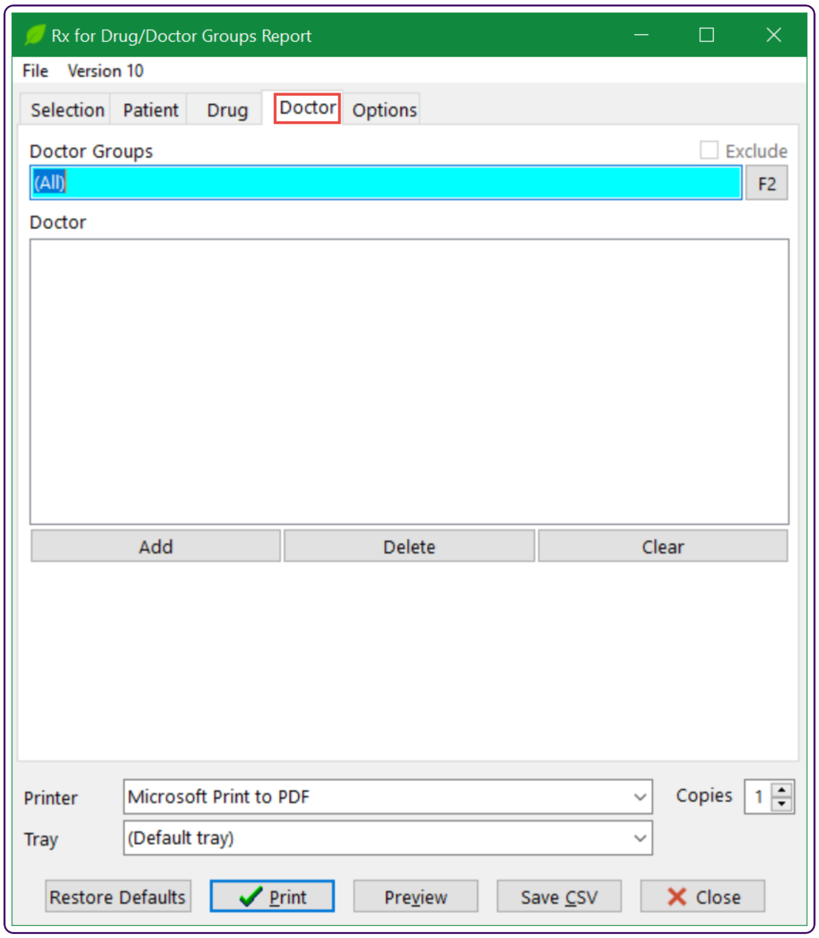


- Optionally select the **F2** button next to the **Drug Groups** field to select the drug groups you want to include in the report.
- Optionally select the **F2** button next to the **Drug Schedule** field to select the drug schedules you want to include in the report.
- Optionally select the **F2** button next to the **Drug Departments** field to select the drug departments you want to include in the report.

- To generate the report for specific drugs only, select the **Add** button below the **Drug** field, then search for and select drug you want to include in the report.

  The **Remove** button removes individual items from the **Drug** list, and the **Clear** button removes all items from the **Drug** list.

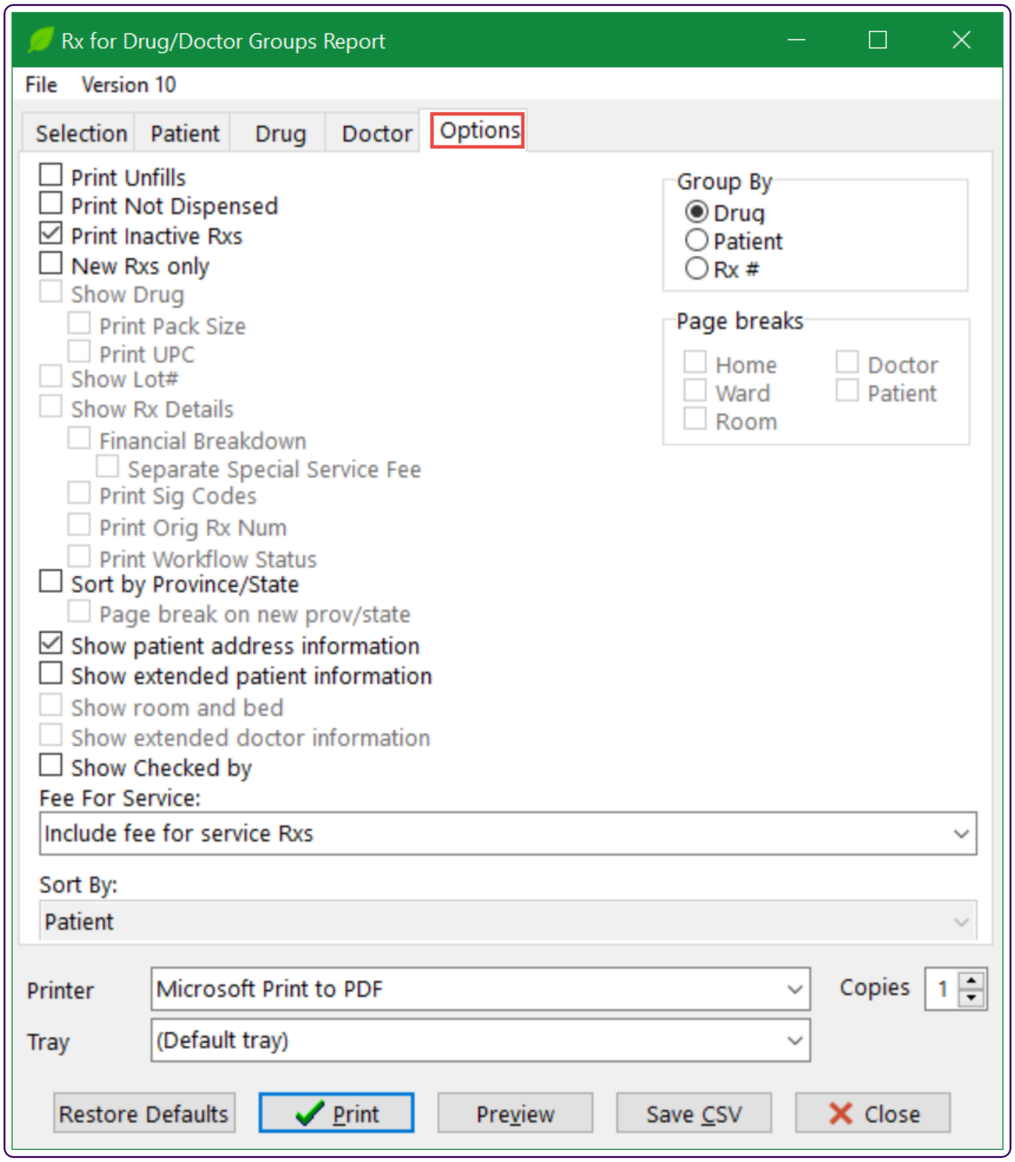
5. From the **Doctor** tab:



- Optionally select the **F2** button next to the **Doctor Groups** field to select the doctor groups you want to include in the report.
- To generate the report for specific prescribers only, select the **Add** button below the **Doctor** field, then search for and select prescriber you want to include in the report.

  The **Remove** button removes individual prescribers from the **Doctor** list, and the **Clear** button removes all prescribers from the **Doctor** list.

6. From the **Options** tab:



- Use the **Group By** options to specify how the report will be organized.
- Select **Include Fee For Service Rxs**, **Exclude Fee For Service Rxs**, or **Only Fee For Service Rxs** to specify how you want the report to handle Fee For Service Rxs.

- The most common fields that should be enabled are described below:
  - **Print Unfills**: Includes all unfills (Rxs placed on Hold).
  - **Print Not Dispensed**: Includes all Rxs marked as Not Dispensed (i.e. OTC Rxs).
  - **Print Inactive**: Includes all Rxs with a status of Inactive.
  - **New Rxs only**: Prints new prescriptions only.
  - **Show Drug**: Prints the drug name.
  - **Show Lot#**: If you maintain lot numbers in your drug cards, selecting this option includes them in the report
  - **Show Rx Details**: Prints the Rx quantity, the status, the first fill, the remaining quantity, the authorized quantity and the current fill date.
  - **Financial Breakdown**: Includes all of the financial details of prescriptions.
  - **Separate Special Services Fee**: Separates the SSC field (Special Services Fee Field) from the other cost fields.
  - **Print Sig Codes**: Prints with the sig code for prescriptions.
  - **Sort by Province/State**: Sorts by province or state.
  - **Page break on new Prov/State**: Prints patients in the same province or state on separate pages.
  - **Show Patient Address Information**: Includes the patient address and telephone number.
  - **Show Extended Patient Information**: Prints nursing home, ward, and postal code information.
  - **Show Room and Bed Number**: Includes the bed number assigned to patients in nursing homes.
  - **Show extended Doctor Information**: Includes doctors' license numbers, phone numbers, and addresses.
  - **Checked by**: Prints a signature line at the bottom of the report.
  - **Group by options**: Groups report data either by drug (which works well if you have selected more than one drug), Patient (works well also if you have selected more than one Patient) or by Rx # (which will group in chronological order of dispense by Rx number).
  - **Page Break**: Use to select items to print on separate pages.
  - **Fee for Service**: Includes or hides fee for service items.
  - **Sort By**: Sorts this report. This is enabled only when grouping by patient.

7. Select **Preview** to preview the report or **Print** to generate a printout of the report.

Rx for Drug/Doctor Groups Report
Test Pharmacy, Greenwoods way, Edmonton AB J4J 4J4
(780) 555-5555 Fax: (780) 444-4444

Report Parameters
Fill Date - 01/10/2014 to 07/10/2014
Printing Inactive Rxs
Group By Patient; Show Drug; Show Rx Details; Include Financial Breakdown
Sort By:

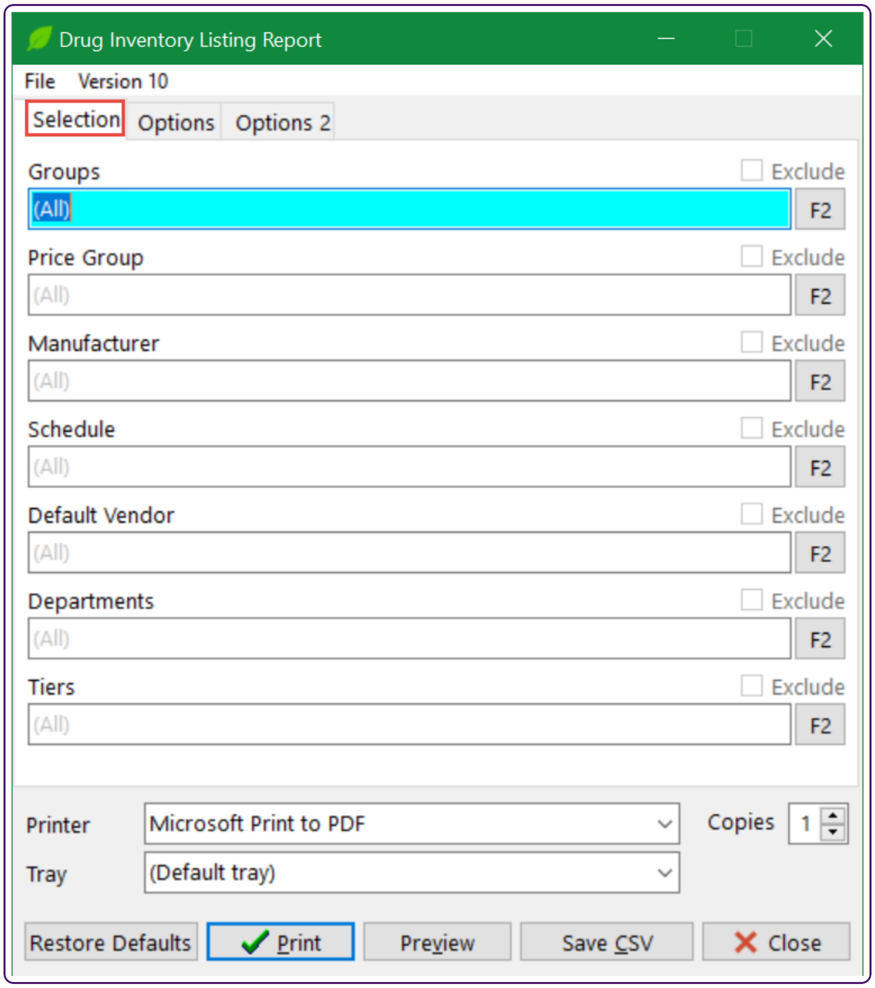
Rx for Drug/Doctor Groups Report						Printed on: 07/10/2014 18:51:57		
Name		Address1	Address2		City/Prov			Phone #
Family Doctor		Nursing Home	Ward-Room (Bed)		Postal Code			
Rx	Qty	Drug Name			DIN		First	Current
Doctor		Status				Lot Numbers	Rem Qty	Auth Qty
Address		City		Prov	Postal	License		Phone
	A.A.C.	Eff. Mkup	Mkup %		Fees	Total	G.P.%	Co-Pay
Sig Code								
Pat, READY FOR PU		Fgsdfasdfasdf			ON			(546) 545-45
1000132	10	TAB Atacand 4mg			02239090		01-Oct-14	01-Oct-14
Dr. Alberta Blue Crosss, Abc							0	10
				ON		81:001527		
	7.18	0.72	256.13		10.49	18.39	60.96	18.39
TAKE 1 TABLET ONCE DAILY								
Pat, READY FOR PU		Fgsdfasdfasdf			ON			(546) 545-45
1000133	10	TAB Atacand 4mg			02239090		01-Oct-10	01-Oct-10
Dr. Alberta Blue Crosss, Abc							530	550
				ON		81:001527		
	7.18	0.72	256.13		10.49	18.39	60.96	18.39
TAKE 1 TABLET ONCE DAILY								
Pat, READY FOR PU		Fgsdfasdfasdf			ON			(546) 545-45
1000134	10	TAB Atacand 4mg			02239090		01-Oct-10	01-Oct-10
Dr. Alberta Blue Crosss, Abc							520	550
				ON		81:001527		
	7.18	0.72	256.13		10.49	18.39	60.96	18.39
TAKE 1 TABLET ONCE DAILY								
Pat, READY FOR PU		Fgsdfasdfasdf			ON			(546) 545-45
1000135	10	TAB Atacand 4mg			02239090		01-Oct-14	01-Oct-14
Dr. Alberta Blue Crosss, Abc							0	10
				ON		81:001527		
	7.18	0.72	256.13		10.49	18.39	60.96	18.39
TAKE 1 TABLET ONCE DAILY								
Pat, READY FOR PU		Fgsdfasdfasdf			ON			(546) 545-45
1000136	10	TAB Atacand 4mg			02239090		01-Oct-14	01-Oct-14
Dr. Alberta Blue Crosss, Abc							0	10
				ON		81:001527		
	7.18	0.72	256.13		10.49	18.39	60.96	18.39
TAKE 1 TABLET ONCE DAILY								
Pat, READY FOR PU		Fgsdfasdfasdf			ON			(546) 545-45
1000137	10	TAB Atacand 4mg			02239090		01-Oct-14	01-Oct-14
Dr. Alberta Blue Crosss, Abc							530	550
				ON		81:001527		
	7.18	0.72	256.13		10.49	18.39	60.96	18.39
TAKE 1 TABLET ONCE DAILY								
Nut, Hazel		123 Long Way			Toronto ON			
		Capital Care In-Patient	Tuesday		M1M 3N4			
1000138	10	TAB Atacand 4mg			02239090		01-Oct-14	01-Oct-14
Dr. Alberta Blue Crosss, Abc		Inact (Copied)					0	10
				ON		81:001527		
	7.18	0.72	283.98		12.49	20.39	64.79	1.27

Drug Inventory Listing report

The **Drug Inventory Listing** report lists drugs and their inventory values. Its details vary according to the options you choose. You can opt to show a total value of inventory in the pharmacy or a line for each drug.

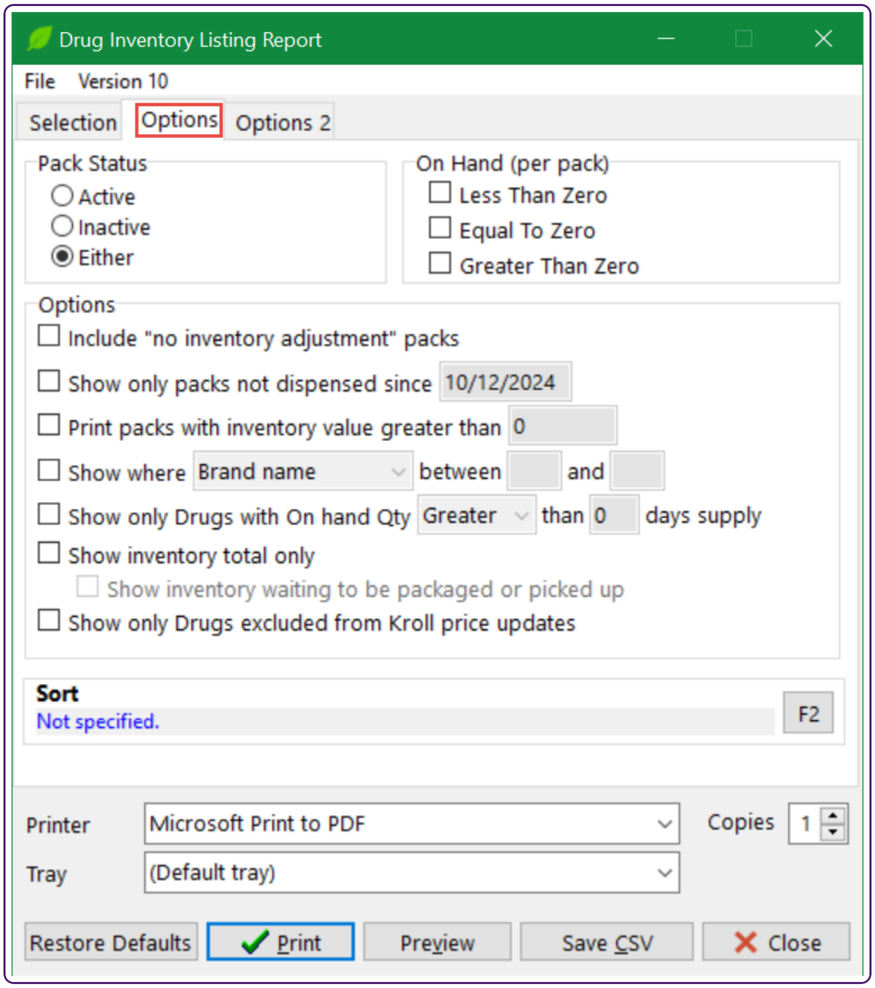
1. From the menu, select **Reports** > **Drug** > **Drug Inventory Listing Report**.

   The **Drug Inventory Listing Report** form is displayed.

2. From the **Selection** tab, optionally use the F2 buttons next to the various fields to select the drug groups, price groups, manufacturers, drug schedules, vendors, drug tiers, and department groups you want to include in the report.

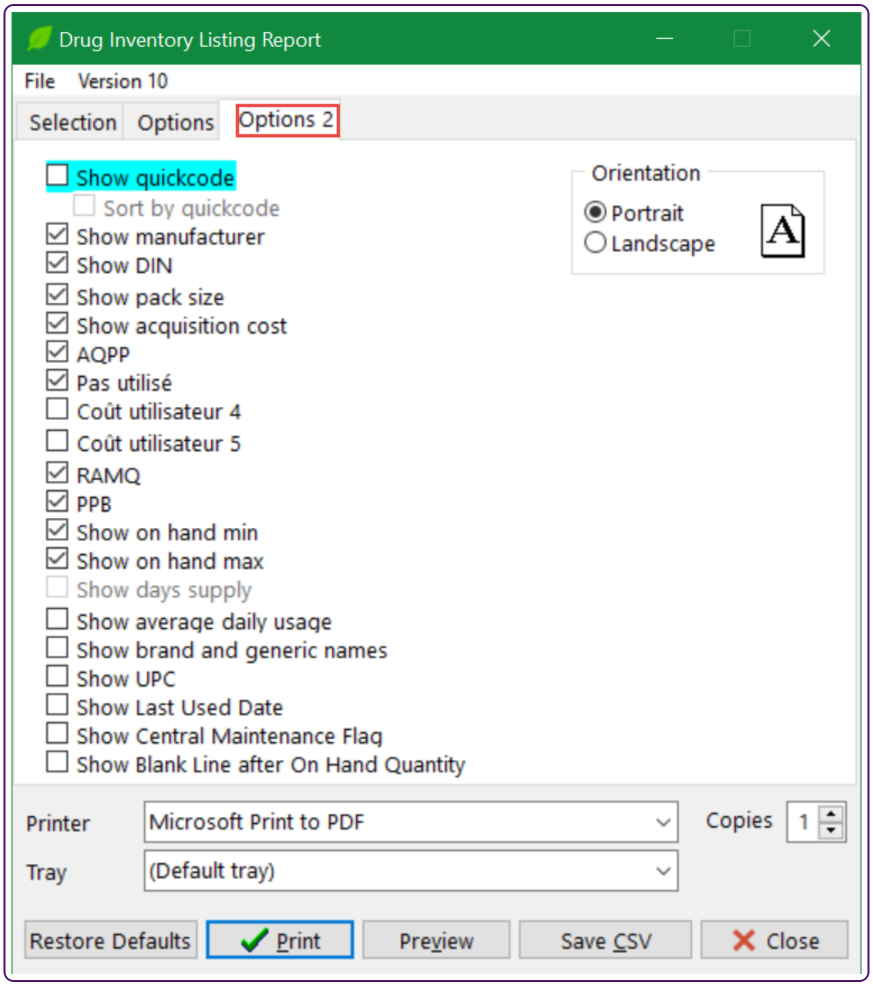
3. From the **Options** tab:



- To specify what drug packs will be included in the report, select **Active**, **Inactive**, or **Either** from the **Pack Status** section.
- To specify what on-hand values will be included in the report, select **Less Than Zero**, **Equal To Zero**, and/or **Greater Than Zero** from the **On Hand (per pack)** section.
- **Include ‘no inventory adjustment’ packs**: select to print all drugs not flagged for inventory adjustment (i.e. during the “Receive “process).
- **Show only packs not dispensed since [x]**: select to include only those drugs that have not been filled since the date entered.
- **Print packs with an inventory value greater than [x]**: select to print all drugs with an inventory value greater than the number entered.
- **Show only Drugs with an On hand Qty [Greater or Less] than [x] days supply**: select to print any values greater or less than the days supply selected.
- **Show inventory total only**: select to print the inventory value only, not a detailed list.

- **Show inventory waiting to be packed or picked up**: select to include drug inventory that is waiting to be packed or picked up.
- **Show only Drugs excluded from Kroll price updates**: select to present a list of drugs that have been excluded in Kroll price updates. The **Only allow manual price changes** checkbox on the drugs card is selected for these drugs.
- **Sort**: select F2 to choose the sequence in which records are displayed on the report.
- **Printer**, **Tray**, and **Copies**: select the printer, tray, and number of copies you want to print.

4. From the **Options 2** tab:



- **Show quickcode**: select to print any quickcode assigned to a drug.
- **Sort by quickcode**: select to sort records by their quickcodes.
- **Show manufacturer**, **Show DIN**, **Show pack size**, and **Show acquisition cost**: select to show the drug manufacturer, drug identification number, drug pack size, and drug acquisition cost, respectively.
- Manufacturer fields: select these to include the dollar value listed on the applicable manufacturer field of the drug card.
- **Show on hand min** and **Show on hand max**: Select to include the min and max on-hand values, respectively. These values appear when inventory controls are set to min/max.
- **Show days supply**: select to include days supply values. This field is enabled when the inventory control is set to days supply.
- **Show average daily usage**: select to include the average daily usage.
- **Show brand and generic names**: select to print the brand and generic names of the drugs.

- **Show UPC**: select to include the UPC for each individual drug.
- **Show Last Used Date**: select to print the last time the drug was filled in a prescription.
- **Show Central Maintenance Flag**: select to include a column that indicates whether each drug is centrally maintained.
- **Show Blank Line after On Hand Quantity**: select to present a line after each on-hand value. This is often used to record the number of tablets counted during the fiscal inventory process.

5. Select **Preview** to preview the report or **Print** to generate a printout of the report.

Drug Inventory Listing Report
Kroll Pharmacy, 220 Duncan Mill Road, Toronto ON
(416) 383-1010 Fax: (416) 383-0001

ReportParameters
Schedules - G (Controlled); N (Narcotic); T (Targeted)
On Hand Quantity - Greater Than Zero
Pack Status - Active
Sort by Brand name, Generic name

Drug Inventory Listing Report — Printed on: 02/10/2014 07:55:28

Drug	Mfr.	DIN	Pack Size	Acq. Cost	Min	Min Days	Max	Max Days	OnHnd Qty	Man. Count	Avg. Daily	On Hand Value
Fiorinal C 1/2 30mg CAP Asa/caffeine/butalbital/codeine	NOV	00176206	100	200.00	**100**	0	**200**	0	250	___	0.0	500.00
Fiorinal C 1/4 15mg CAP Asa/caffeine/butalbital/codeine	NOV	00176192	100	163.00	**100**	0	**200**	0	25	___	0.0	40.75
Oxycontin 10mg TAB Oxycodone HCl	PFP	02202441	60	46.27	**100**	100	**200**	200	100	___	1.0	77.12
Percodan 5mg/325mg TAB Oxycodone HCl / ASA	BQU	01916572	25	19.54	**300**	0	**500**	0	100	___	0.0	78.16
Percodan 5/325mg TAB Oxycodone Hcl/ASA	BQU	00580236	25	19.54	**100**	0	**200**	0	100	___	0.0	78.16
Percodan Demi 2.5mg/325mg TAB Oxycodone Hcl/asa	BQU	01916556	100	61.99	**50**	0	**100**	0	100	___	0.0	61.99
Tylenol With Codeine #3 30mg TAB Acetaminophen/Codeine Phosphate Cpd	JNO	02163926	100	2.00	**500**	0	**1000**	0	500	___	0.0	10.00

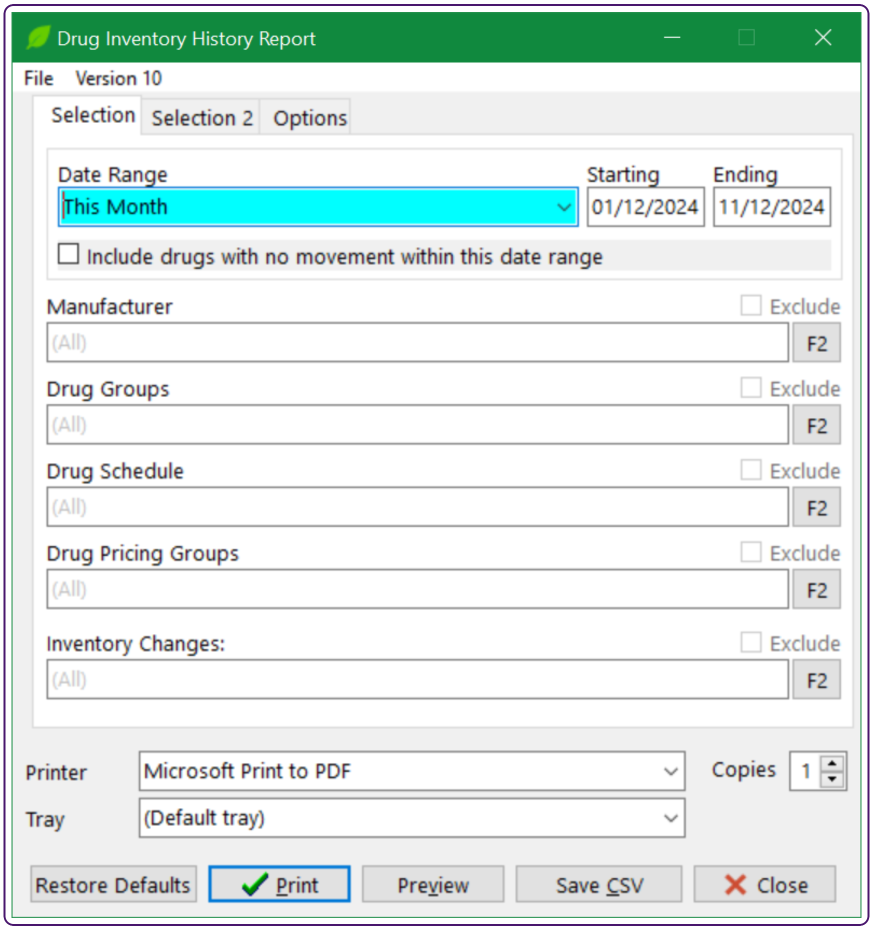
Total On Hand Value 846.18

Drug Inventory History report

The **Drug Inventory History** report presents a historical snapshot of drug inventory values based on the options you choose.

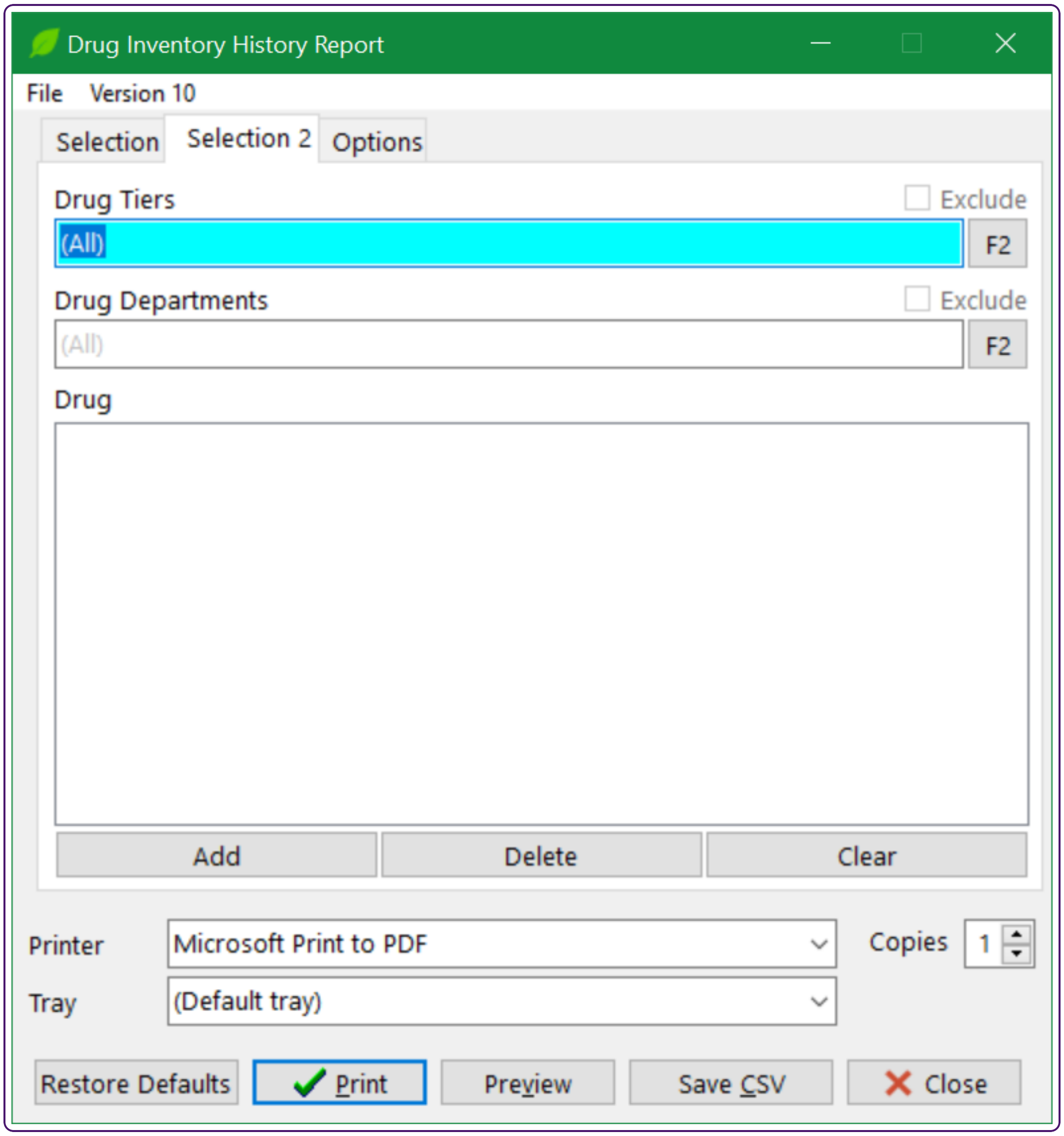
1. From the menu, select **Reports** > **Drug** > **Drug Inventory History**.

   The **Drug Inventory History Report** form is displayed.

2. From the **Selection** tab:
   - Select a **Date Range** or enter **Starting** and **Ending** dates.
   - Use the F2 buttons next to the various fields to select the manufacturers, drug groups, drug schedules, drug pricing groups, and inventory changes you want to include in the report.
   - **Printer**, **Tray**, and **Copies**: select the printer, tray, and number of copies you want to print.

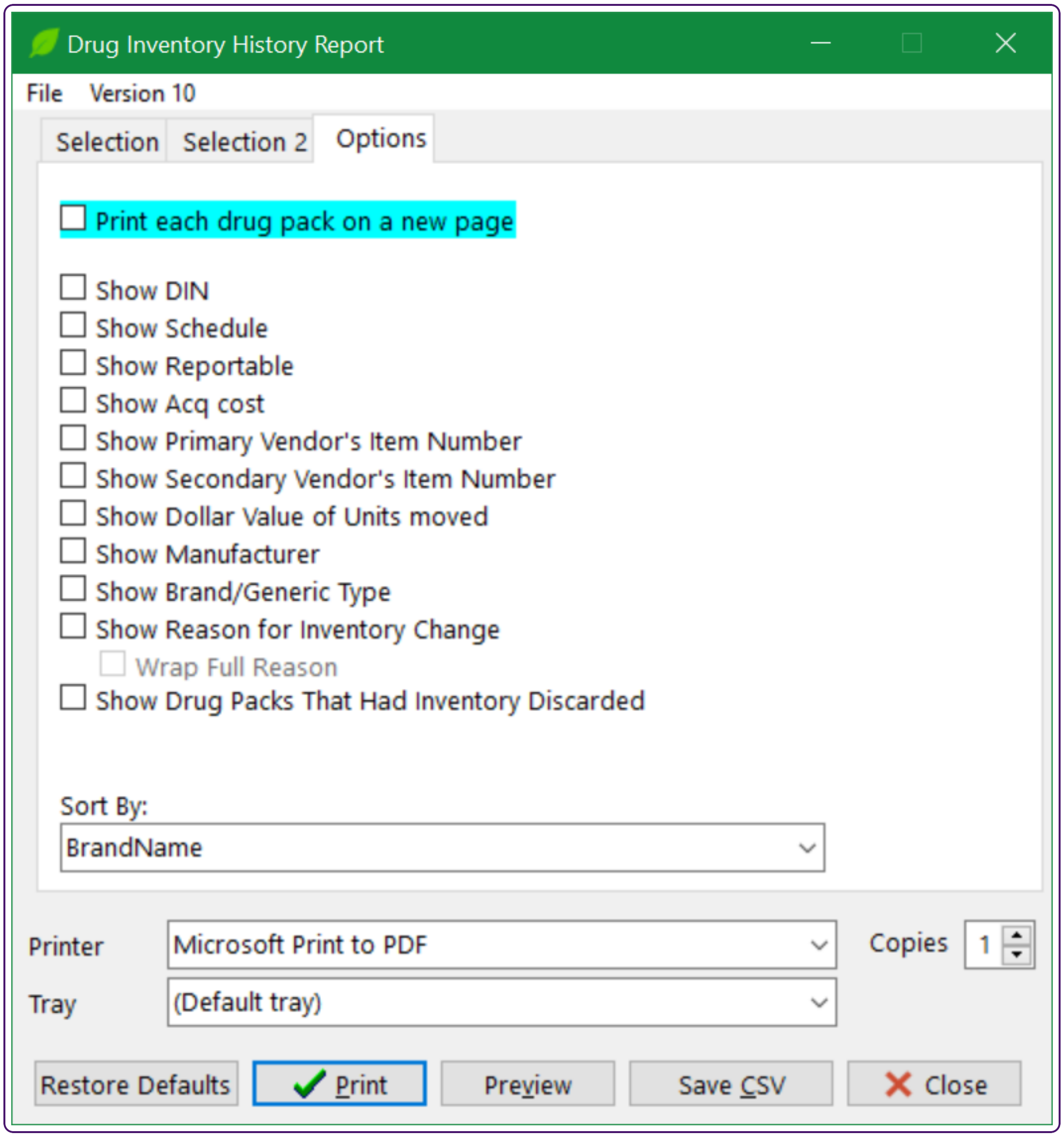
3. From the **Selection 2** tab:



- Use the F2 buttons next to the **Drug Tiers** and **Drug Departments** fields to select the drug tiers and drug departments you want to include in the report.
- To generate the report for specific drugs only, select the **Add** button below the **Drug** field, then search for and select the appropriate drugs.

  Select the **Remove** button to remove individual drugs from the **Drug** list, or the **Clear** button to remove all of the drugs.

4. From the **Options** tab:



- **Print each drug pack on a new page**: select to print each pack size on a separate page.
- **Select the Show DIN**: select to include the Drug Identification Numbers of the selected drugs.
- **Show Schedule**: select to include the drug schedule.
- **Show Reportable**: select to include the reportable flag from the drug card.
- **Show Acq cost**: select to include the drug acquisition cost.
- **Show Primary Vendor’s Item Number**: select to include the item numbers from each drug's primary vendor.

- **Show Secondary Vendor’s Item Number**: select to include the item numbers from each drug's secondary vendor.
- **Show dollar value of Units moved**: select to include the dollar value of the units moved.
- **Show Manufacturer**: select to include the manufacturer’s short code, for example APX for Apotex.
- **Show Brand/Generic Type**: select to print the type of drug, for example: Generic Multi Source, Generic Single source, Brand, Brand single source, or Brand Multi source.
- **Show reason for Inventory Change**: select to print the reason for the inventory change, and the time the change was made.
- **Wrap Full Reason**: select to wrap the reason text if it exceeds the width of the page.

5. Select **Preview** to preview the report or **Print** to generate a printout of the report.

Drug Inventory History Report
Test Pharmacy, Greenwoods way, Edmonton AB J4J 4J4
(780) 555-5555 Fax: (780) 444-4444

Report Parameters
Date Range - 08/10/2014 to 08/10/2014
Drugs - Crestor 40mg

Drug Inventory History Report — Printed on: 08/10/2014 13:15:27
Date Range: 08-Oct-2014 to 08-Oct-2014

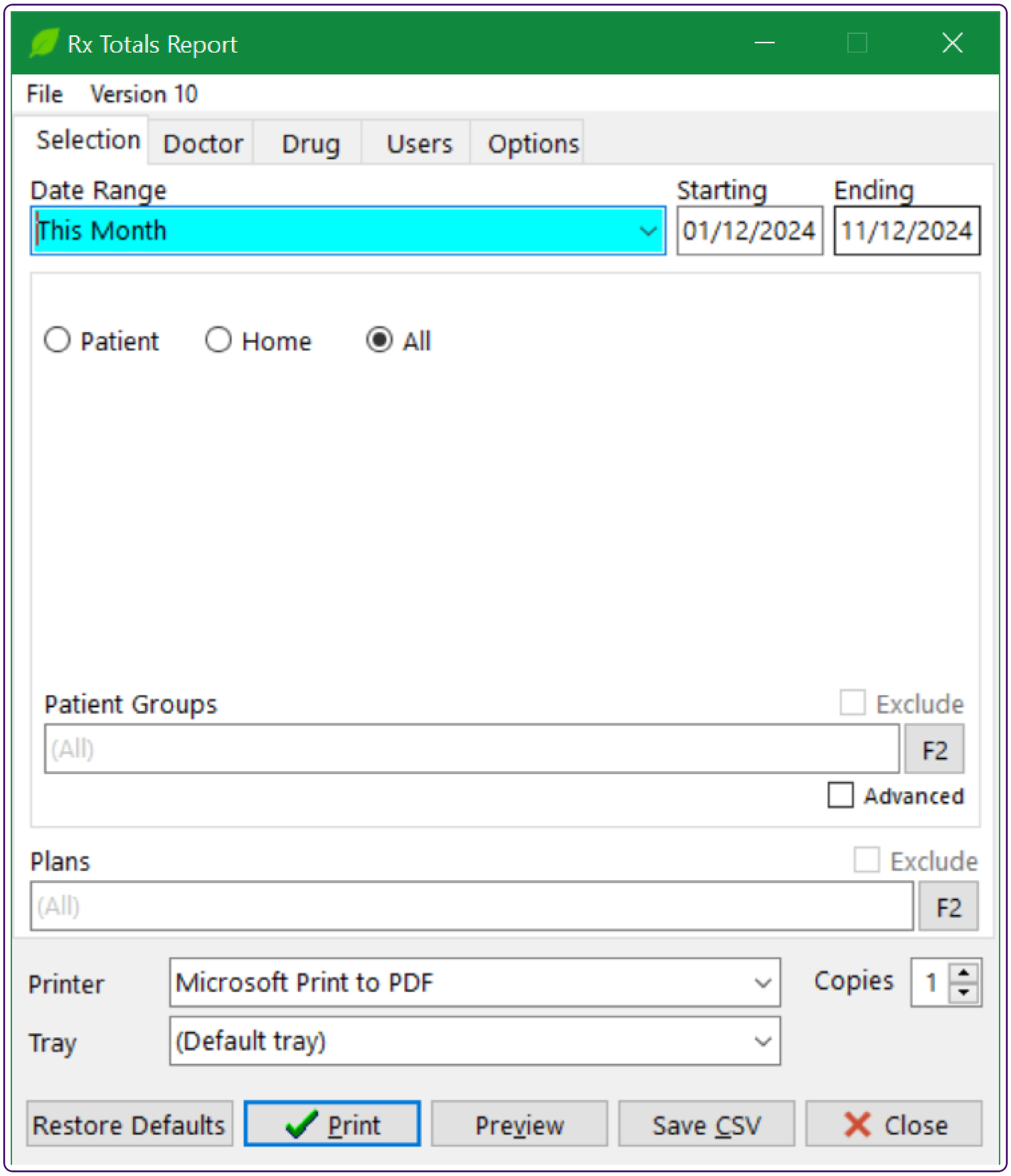
Date	User	Description	Type	Decreases	Increases	$ Value	Balance	Warnings
Crestor 40mg TAB			**DIN: 02247164**					**Pack Size: 30**
Mfr: AZC	Brand/Generic Type: Brand Single Source		Schedule: 1	Reportable: N	Acq Cost: 63.04	Primary Vendor Item#: 7001401		Secondary Vendor Item#: 35330
Opening Inventory:							0	
08-Oct-2010	AW	Rx# 1000152	Fill	10		21.01	-10	
08-Oct-2010	AW	adjustment	Manual		110	231.15	100	
Balance				10	110	252.16	100	

Rx Totals report

The Rx Totals report prints the number of new Rxs, repeat Rxs, total Rxs, and percentage totals based on the options you select.

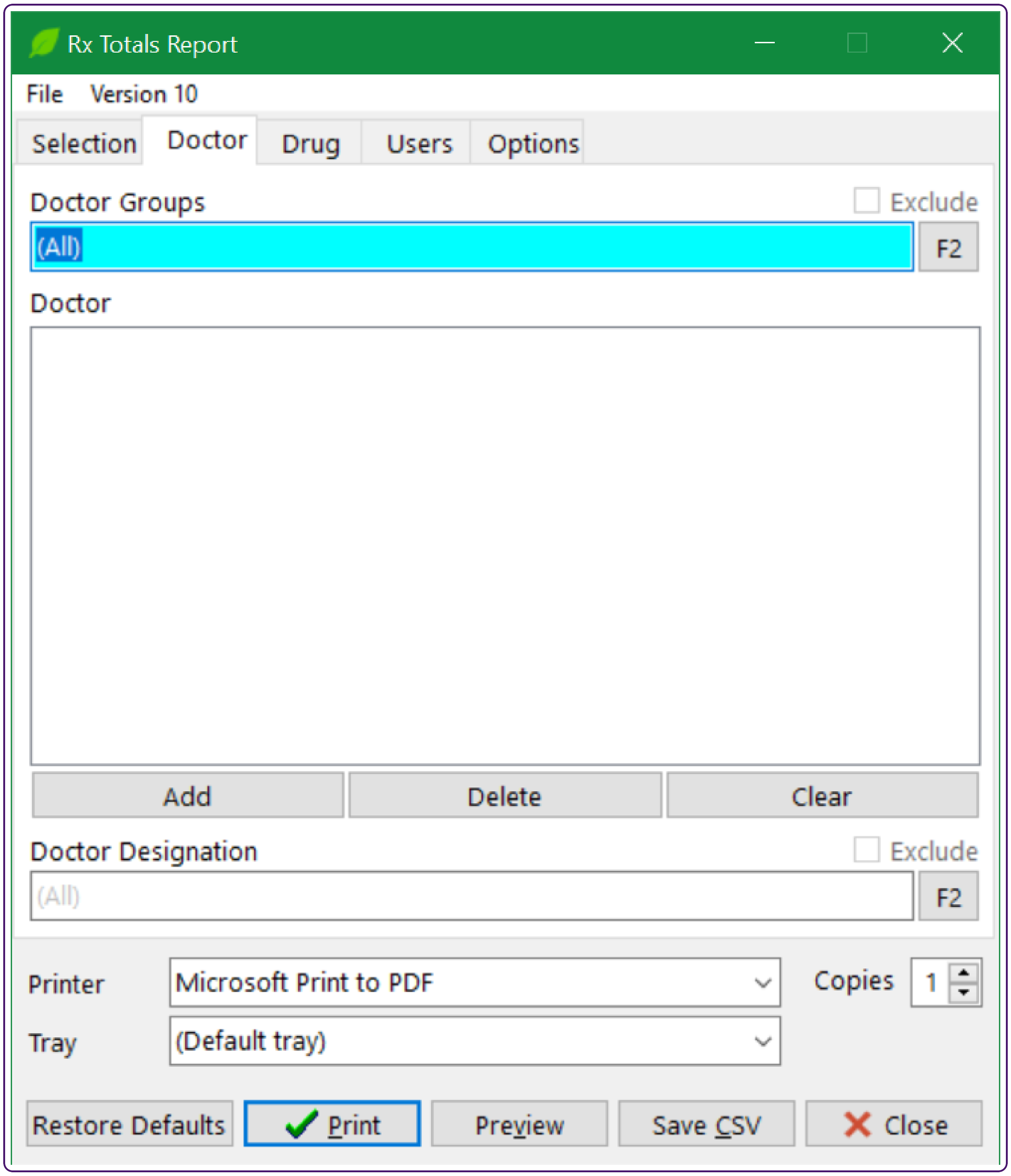
1. From the menu, select **Reports** > **Rx** > **Rx Totals**.

   The **Rx Totals Report** form is displayed.



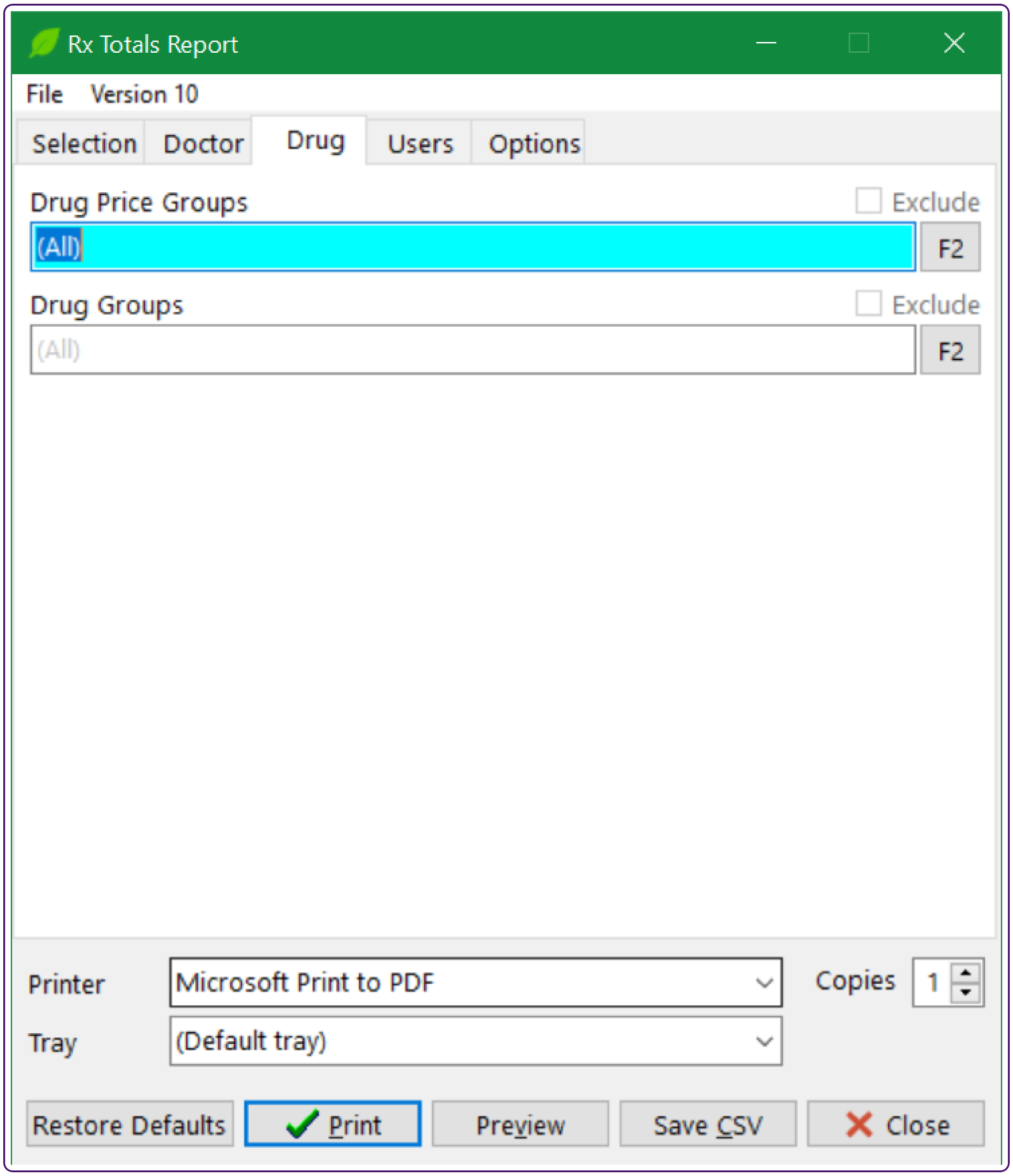
2. From the **Selection** tab:
   - Select a **Date Range** or enter **Starting** and **Ending** dates.
   - To generate the report for specific patients only, select the **Patient** button and select **Add**, then search for and select each patient you want to include in the report.
   - To generate the report for specific nursing homes only, select the **Home** button and select **Add**, then select the **Home** and applicable **Ward** and select **OK**. Repeat this step for each home you want to include in the report.
   - Use the **F2** button next to the **Patient Groups** and **Plans** fields to select the patient groups and plans you want to include in the report.
   - **Printer**, **Tray**, and **Copies**: select the printer, tray, and number of copies you want to print.

3. From the **Doctor** tab:



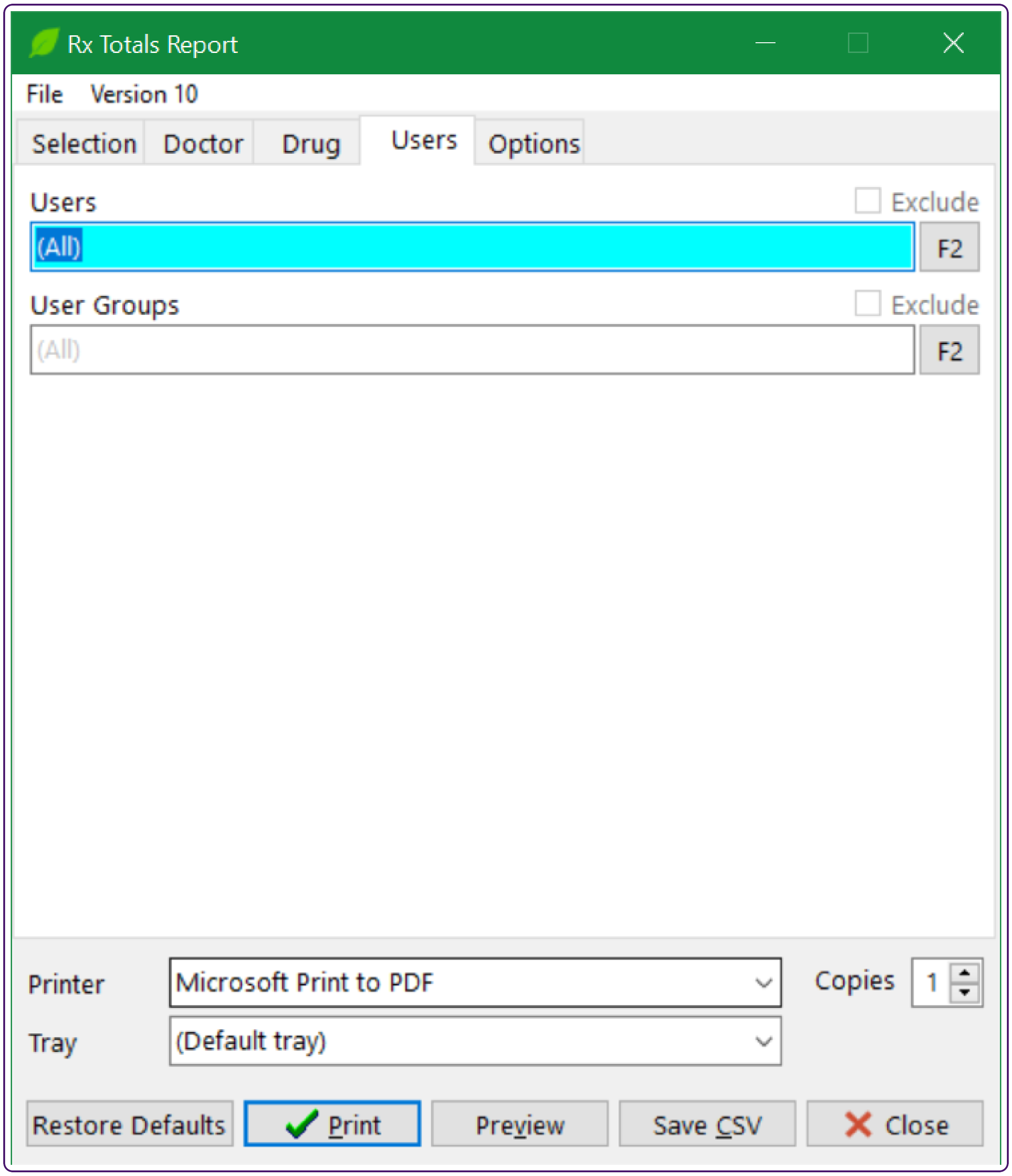
- Select the **F2** button next to the **Doctor Groups** field to select the doctor groups you want to include in the report.
- To generate the report for specific prescribers only, select the **Add** button below the **Doctor** field, then search for and select each prescriber you want to include in the report.

4. From the **Drug** tab:



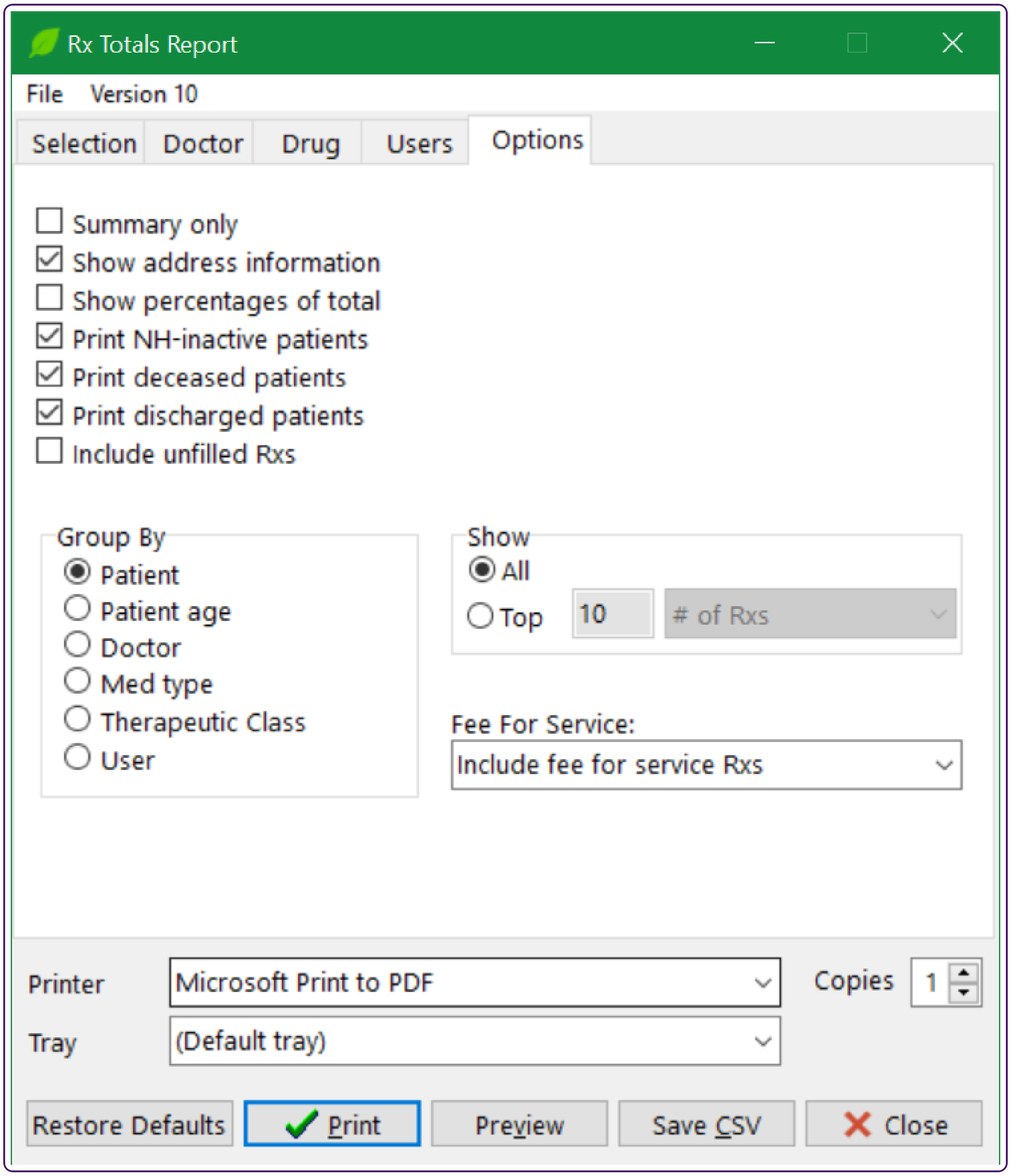
- Use the **F2** buttons next to the **Drug Price Groups** and **Drug Groups** field to select the drug price groups and drug groups you want to include in the report.

5. From the **Users** tab:



- Use the **F2** button next to the **Users** and **User Groups** fields to select the users and user groups you want to include on the report.

6. From the **Options** tab:



- **Summary only**: select to print a summary only of the selected information
- **Show address information**: select to include the patient or doctor address.
- **Show percentages of total**: select to include the percentage of the total Rxs and the total dollar value.
- **Print NH-inactive patients**: select to include inactive nursing home patients.

- **Print deceased patients**: select to include patients who were set to deceased within the report's timeframe.
- **Print discharged patients**: select to include patients who were discharged from a nursing home within the report's timeframe.
- **Include unfilled Rxs**: Select to include unfilled Rxs in the report's Rx count.
- In the Group By section, select the category by which you want to group records.
- In the Show section, select **All** to include All Rxs, or **Top [x]** to include only the specified number of top records.

7. Select **Preview** to preview the report or **Print** to generate a printout of the report.

Rx Totals Report
Test Pharmacy, Greenwoods way, Edmonton AB J4J 4J4
(780) 555-5555 Fax: (780) 444-4444

Report Parameters
Fill Date - 01/10/2014 to 07/10/2014
Group by patient

Rx Totals Report
FF = First Fill

Printed on: 07/10/2014 18:54:23

FF	Patient	Address 1	City/Prov	Postal	New Rxs	Repeat Rxs	Total Rxs	Total Amount
X	Ab, Patient		AB		1	0	1	10.63
	Another, Patient		ON		3	2	5	2,234.71
	Nut, Hazel	123 Long Way	Toronto ON	M1M 3N4	4	4	8	152.45
X	Pat,Test	Fgsdfasdfasdf	ON		3	3	6	110.34
	Totals	(4 patients)			**11**	**9**	**20**	**2,508.13**
	New patient Totals	(2 first fills)			4	3	7	120.97

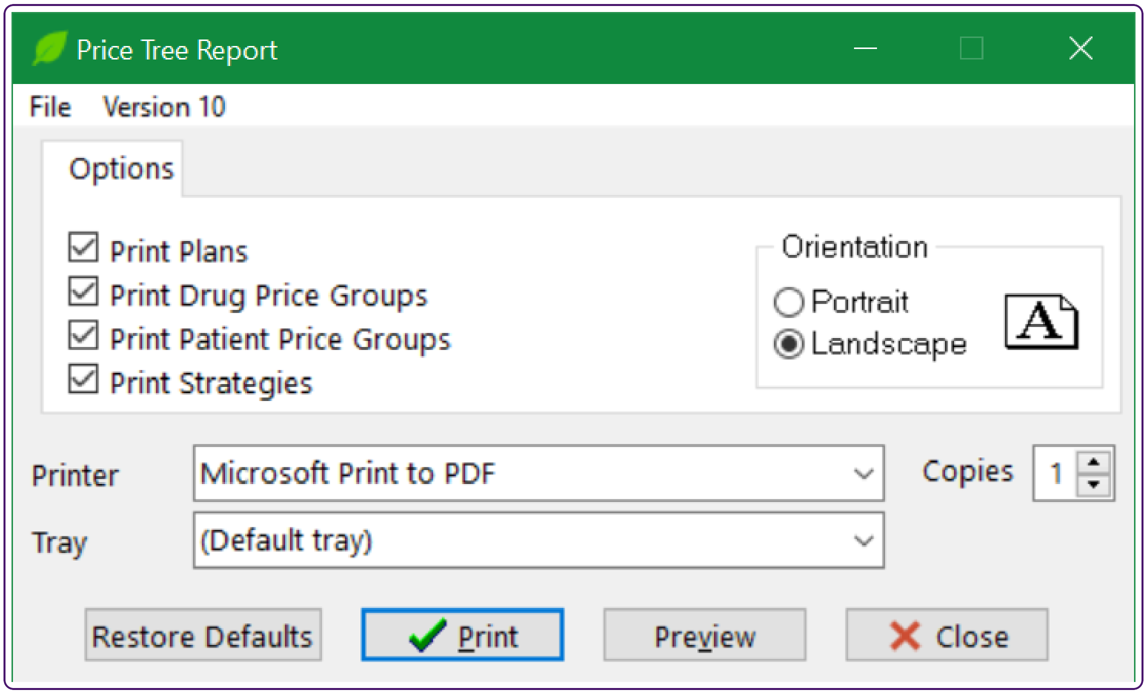
*** New patient totals are included in grand totals ***

Price Tree report

The **Price Tree** report provides all the pricing information setup in the Kroll system, including pricing strategies, patient price groups, drug price groups, and the pricing strategies attached to the plans.

1. From the menu, select **Reports** > **Other** > **Price Tree Report**.

   The **Price Tree Report** form is displayed.



2. Select the items you want included in the report.

3. Click **Preview** to preview the report or **Print** to generate a printout of the report.

Price Tree Report
Test Pharmacy, Greenwoods way, Edmonton AB J4J 4J4
(780) 555-5555 Fax: (780) 444-4444

Price Tree Report — Printed on: 13/10/2014 15:04:38

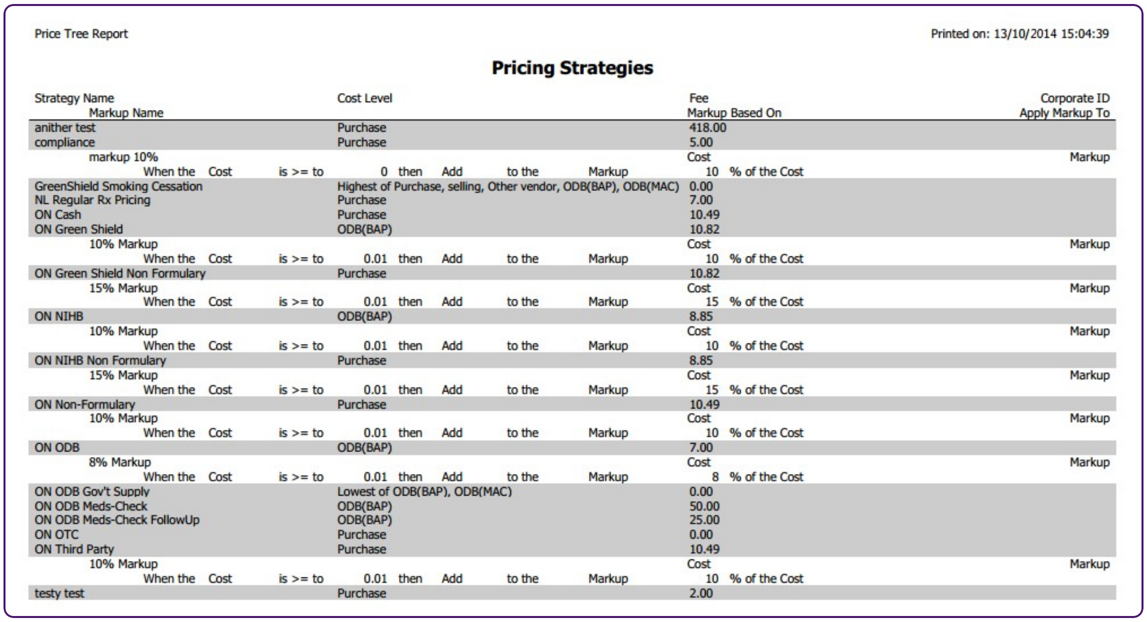
Plans

Plan SubPlan	Price Group	National Plan ID Type	Pharmacy ID Brand/Generic Type	Strategy	Default Pricing	Sec. Plan Pricing	Ignore Prc Grp
Alberta Blue Cross		(AB Blue Cross)	99992003				
ABC		Regular/Mixture Formulary	Any Brand/Generic Type Any Brand/Generic Type	ON Cash ON Green Shield	–	No	No
Assure Health		(Assure)	ON9974000046				
AHE		Regular/Mixture Formulary	Any Brand/Generic Type Any Brand/Generic Type	ON Non-Formulary ON Third Party	–	No	No
Canadian Armed Forces (National Defence)		(Canadian Forces)					
CAF		Regular/Mixture Formulary	Any Brand/Generic Type Any Brand/Generic Type	ON Non-Formulary ON Third Party	–	No	No
Cash							
CASH		All	Any Brand/Generic Type	ON Cash	–	No	No
Claim Secure		(ClaimSecure)	S 123123123				
CS		All	Any Brand/Generic Type	ON Non-Formulary	–	No	No
ESI Canada		(ESI)					
ESI		All	Any Brand/Generic Type	ON Non-Formulary	–	No	No
Esorse		(eSorse)					
ESORSE		All	Any Brand/Generic Type	ON Cash	–	No	No
Green Shield Canada		(Green Shield)					
GS		Regular/Mixture Formulary	Any Brand/Generic Type Any Brand/Generic Type	ON Green Shield Non Formulary ON Green Shield	–	No	No
Exceptions:	GS Smoking Cessation Program	All	Any Brand/Generic Type	GreenShield Smoking Cessation			
HBC		(Zellers Employee)					
TEST		All	Any Brand/Generic Type	testy test	–	No	No
Indian Affairs (NIHB)		(NIHB)					
IA		Regular/Mixture Formulary	Any Brand/Generic Type Any Brand/Generic Type	ON NIHB Non Formulary ON NIHB	–	No	No
Johnson's Insurance		(Johnsons Insurance)					
JOHN		All	Any Brand/Generic Type	ON Non-Formulary	–	No	No
MDM		(MDM Insurance)					
MDM		All	Any Brand/Generic Type	ON Non-Formulary	–	No	No
Nexgen Rx		(Nexgen Rx)					
NX		All	Any Brand/Generic Type	ON Non-Formulary	–	No	No
Nunatsiavut Government, Dept. Of Health		(Nunatsiavut)					
NNT		All	Any Brand/Generic Type	ON Third Party	–	No	No
Olympia Trust		(Olympia Trust)					
OLY		All	Any Brand/Generic Type	ON Third Party	–	No	No
Ontario Blue Cross		(ON Blue Cross)					
OBC		All	Any Brand/Generic Type	ON Third Party	–	No	No
Ontario Drug Benefits		(ODB)					
ODB		Regular/Mixture Formulary	Any Brand/Generic Type Any Brand/Generic Type	ON Non-Formulary ON ODB	–	No	No

Price Tree Report — Printed on: 13/10/2014 15:04:39

Patient Price Groups

Patient Price Group	Corporate ID	Override Plan/Drug Group Strategy	Type	Brand/Generic Type	Strategy
another test		Yes	All	Any Brand/Generic Type	anither test
compliance patients		Yes	All	Any Brand/Generic Type	compliance
high fee		Yes	All	Any Brand/Generic Type	anither test
test NH		No	All	Any Brand/Generic Type	testy test



Price Tree Report — Printed on: 13/10/2014 15:04:39

Pricing Strategies

Strategy Name / Markup Name	Cost Level	Fee / Markup Based On	Corporate ID / Apply Markup To
anither test	Purchase	418.00	
compliance	Purchase	5.00	
markup 10%		Cost	Markup
When the Cost is >= to	0 then Add to the Markup	10 % of the Cost	
GreenShield Smoking Cessation	Highest of Purchase, selling, Other vendor, ODB(BAP), ODB(MAC)	0.00	
NL Regular Rx Pricing	Purchase	7.00	
ON Cash	Purchase	10.49	
ON Green Shield	ODB(BAP)	10.82	
10% Markup		Cost	Markup
When the Cost is >= to	0.01 then Add to the Markup	10 % of the Cost	
ON Green Shield Non Formulary	Purchase	10.82	
15% Markup		Cost	Markup
When the Cost is >= to	0.01 then Add to the Markup	15 % of the Cost	
ON NIHB	ODB(BAP)	8.85	
10% Markup		Cost	Markup
When the Cost is >= to	0.01 then Add to the Markup	10 % of the Cost	
ON NIHB Non Formulary	Purchase	8.85	
15% Markup		Cost	Markup
When the Cost is >= to	0.01 then Add to the Markup	15 % of the Cost	
ON Non-Formulary	Purchase	10.49	
10% Markup		Cost	Markup
When the Cost is >= to	0.01 then Add to the Markup	10 % of the Cost	
ON ODB	ODB(BAP)	7.00	
8% Markup		Cost	Markup
When the Cost is >= to	0.01 then Add to the Markup	8 % of the Cost	
ON ODB Gov't Supply	Lowest of ODB(BAP), ODB(MAC)	0.00	
ON ODB Meds-Check	ODB(BAP)	50.00	
ON ODB Meds-Check FollowUp	ODB(BAP)	25.00	
ON OTC	Purchase	0.00	
ON Third Party	Purchase	10.49	
10% Markup		Cost	Markup
When the Cost is >= to	0.01 then Add to the Markup	10 % of the Cost	
testy test	Purchase	2.00	

Sig Code Listing Report

The Sig Code Listing report prints all sig codes you set up in Kroll.

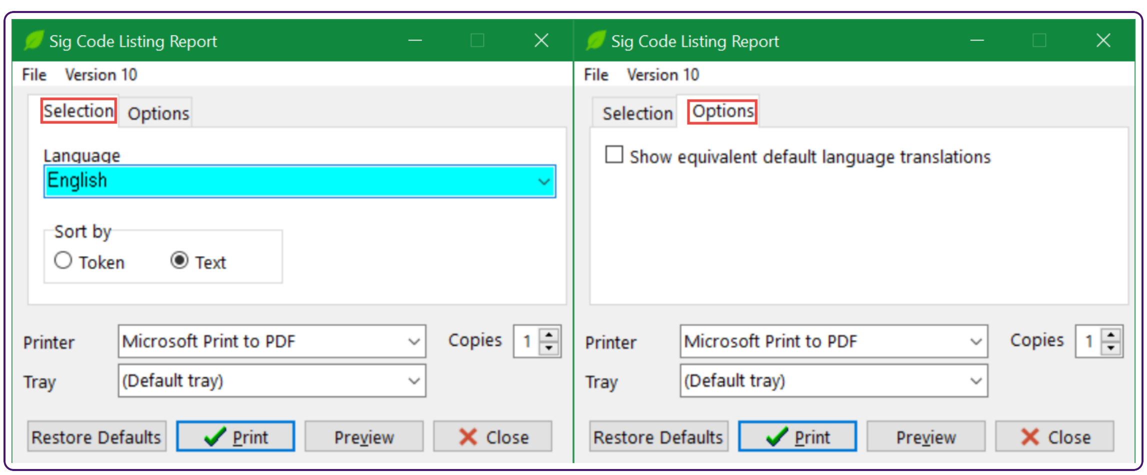
1. From the menu, select **Reports** > **Other** > **Sig Code Report**.

   The **Sig Code Listing Report** form is displayed.

2. Select a **Language**.
3. Select a **Sort by** option.

   If you select Token, the actual sig code is printed on the report (i.e., BID). If you select Text, the sig code definition is printed on the report (i.e., 'twice a day').

4. If you selected a language other than English on the Selection tab, and you want the report to show the English translation, select **Show equivalent default language translations** on the **Options** tab.



5. Select **Preview** to preview the report or **Print** to generate a printout of the report.

Sig Code Listing Report

ReportParameters
Language-English
SortByToken

SigCodeListingReport — Printed on: 11/09/2014 10:10:25

Token	Text
*1	TAKE 1 TABLET ONCE DAILY
*1C	TAKE 1 CAPSULE ONCE A DAY
*1P	TAKE1 TEASPOON(5ML)ONCEDAILY
*1WF	*1 - DO NOT TAKE ON AN EMPTY STOMACH
*2	TAKE 1 TABLET TWICE DAILY
*2C	TAKE 1 CAPSULE TWICE A DAY.
*2P	TAKE 1 TEASPOON 2 TIMES A DAY
*3	TAKE 1 TABLET 3 TIMES A DAY
*3C	TAKE 1 CAPSULE 3 TIMES A DAY
*3P	TAKE 1 TEASPOON 3 TIMES A DAY
*4	TAKE 1 TABLET 4 TIMES DAILY
*4C	TAKE 1 CAPSULE 4 TIMES A DAY
*4P	TAKE 1 TEASPOON 4 TIMES A DAY
*AM	TAKE 1 TABLET EVERY MORNING
*HS	TAKE 1 TABLET AT BEDTIME
1-2	1 OR 2
1.5T	TAKE 1 AND 1/2 TABLETS
1.5TS	TAKE1&1/2TEASPOONSFUL(7.5ML)
1/21T	TAKE 1/2 TO 1 TABLET
1/2H	1/2 HOUR
1/2T	TAKE1/2 TABLET
1/2TS	TAKE1/2 TEASPOONFUL(2.5MLS)
12C	TAKE 1 OR 2 CAPSULES
12D	ONCE OR TWICE A DAY
12GTT	INSTILL 1 OR 2 DROPS INTO
12T	TAKE 1 OR 2 TABLETS
12TS	TAKE1 TO2 TEASPOONSFUL
1BID	TAKE TWICE A DAY FOR 1 DAY
1C	TAKE1 CAPSULE
1ENBID	USE 1 SPRAY IN EACH NOSTRIL TWICE DAILY
1ENQD	USE 1 SPRAY IN EACH NOSTRIL DAILY
1H	1 HOUR
1P	APPLY ONEPATCH
1ST	FIRST
1T	TAKE1 TABLET
1TB	TAKE1 TABLESOONFUL(15ML)
1THS	AND 1 TABLET AT BEDTIME

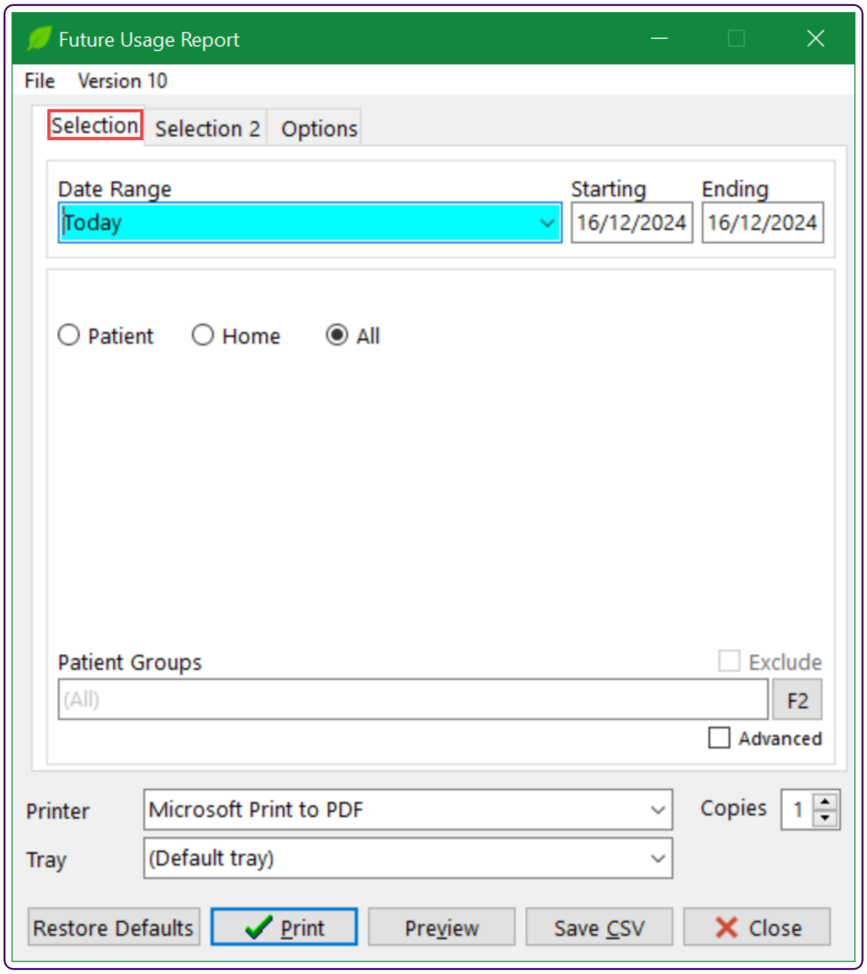
Future Usage report

The **Future Usage** report prints the prescriptions due for refill within a specified time frame. It is useful when preparing medication orders specifically for inventory you do not readily keep on hand.

1. From the menu, select **Reports** > **Rx** > **Future Usage Report**.

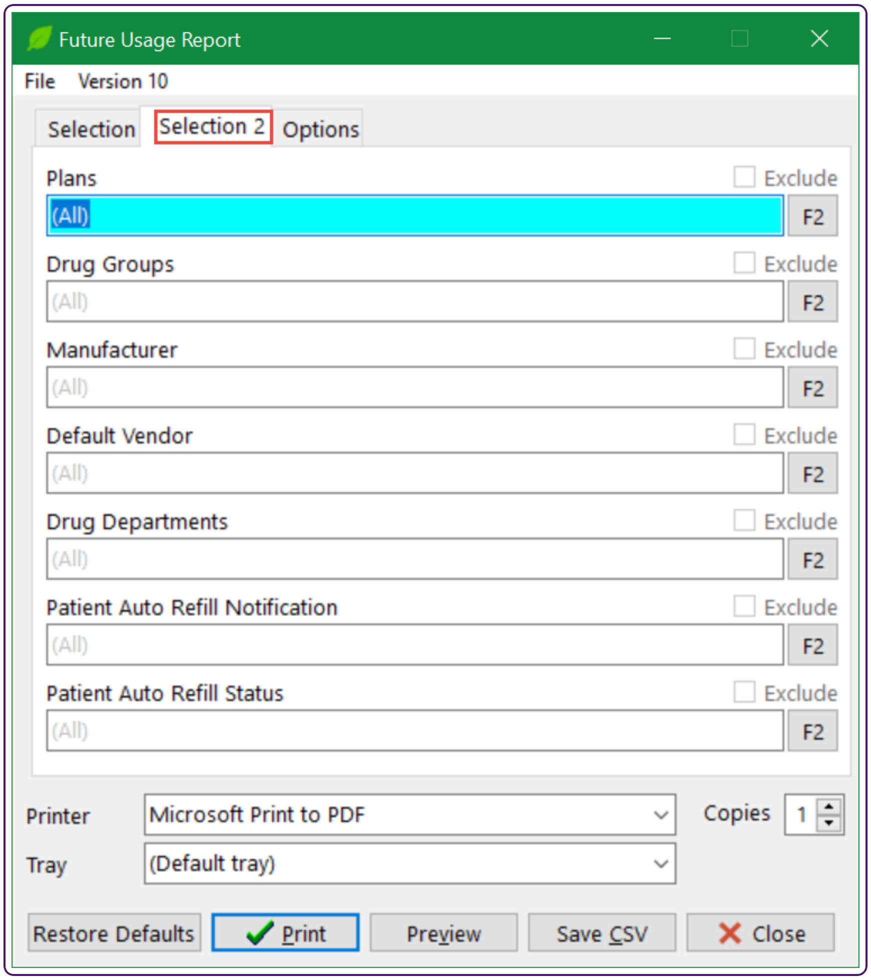
   The **Future Usage Report** form is displayed.

2. From the **Selection** tab:



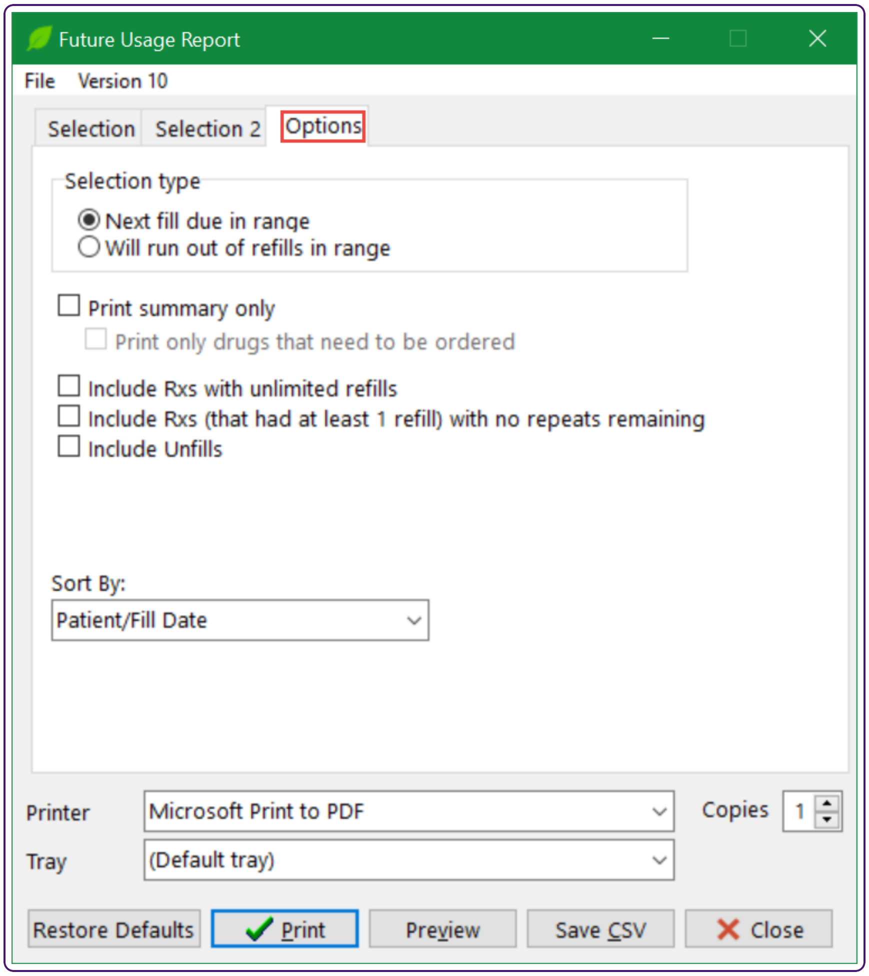
- Use the **Date Range**, **Starting**, and **Ending** fields to specify a date range.
- To generate the report for specific patients only, select the **Patient** button and select **Add**. Search for and select the patients you want to include in the report.
- To generate the report for specific nursing homes only, select the **Home** button and select **Add**. Select the **Home** and applicable **Ward** and select **OK**.
- Repeat this step for each home you want to include in the report.
- Select the **F2** button next to the **Patient Groups** field to select the patient groups you want to include in the report.

3. From the **Selection 2** tab:

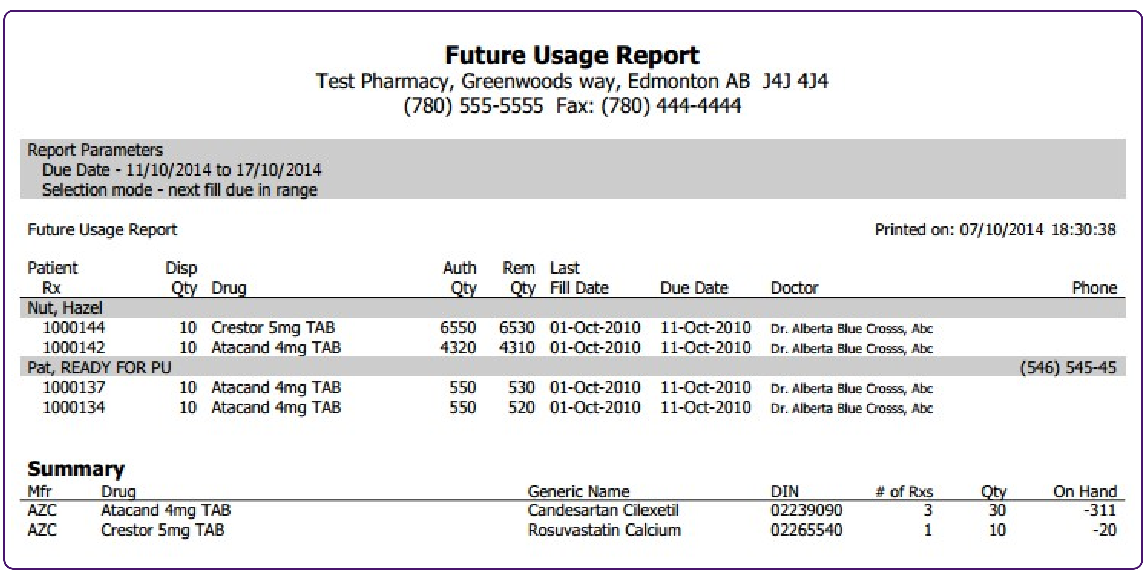


- Use the F2 buttons next to the various fields to select the plans, drug groups, manufacturers, drug departments, patient auto refill status, and patient auto refill notifications you want to include in the report.

4. From the **Options** tab, select the parameters you want applied to the report.



5. Select **Preview** to preview the report or **Print** to generate a printout of the report.



Future Usage Report
Test Pharmacy, Greenwoods way, Edmonton AB J4J 4J4
(780) 555-5555 Fax: (780) 444-4444

Report Parameters
Due Date - 11/10/2014 to 17/10/2014
Selection mode - next fill due in range

Future Usage Report — Printed on: 07/10/2014 18:30:38

Patient / Rx	Disp Qty	Drug	Auth Qty	Rem Qty	Last Fill Date	Due Date	Doctor	Phone
Nut, Hazel								
1000144	10	Crestor 5mg TAB	6550	6530	01-Oct-2010	11-Oct-2010	Dr. Alberta Blue Cross, Abc	
1000142	10	Atacand 4mg TAB	4320	4310	01-Oct-2010	11-Oct-2010	Dr. Alberta Blue Cross, Abc	
Pat, READY FOR PU								(546) 545-45
1000137	10	Atacand 4mg TAB	550	530	01-Oct-2010	11-Oct-2010	Dr. Alberta Blue Cross, Abc	
1000134	10	Atacand 4mg TAB	550	520	01-Oct-2010	11-Oct-2010	Dr. Alberta Blue Cross, Abc	

Summary

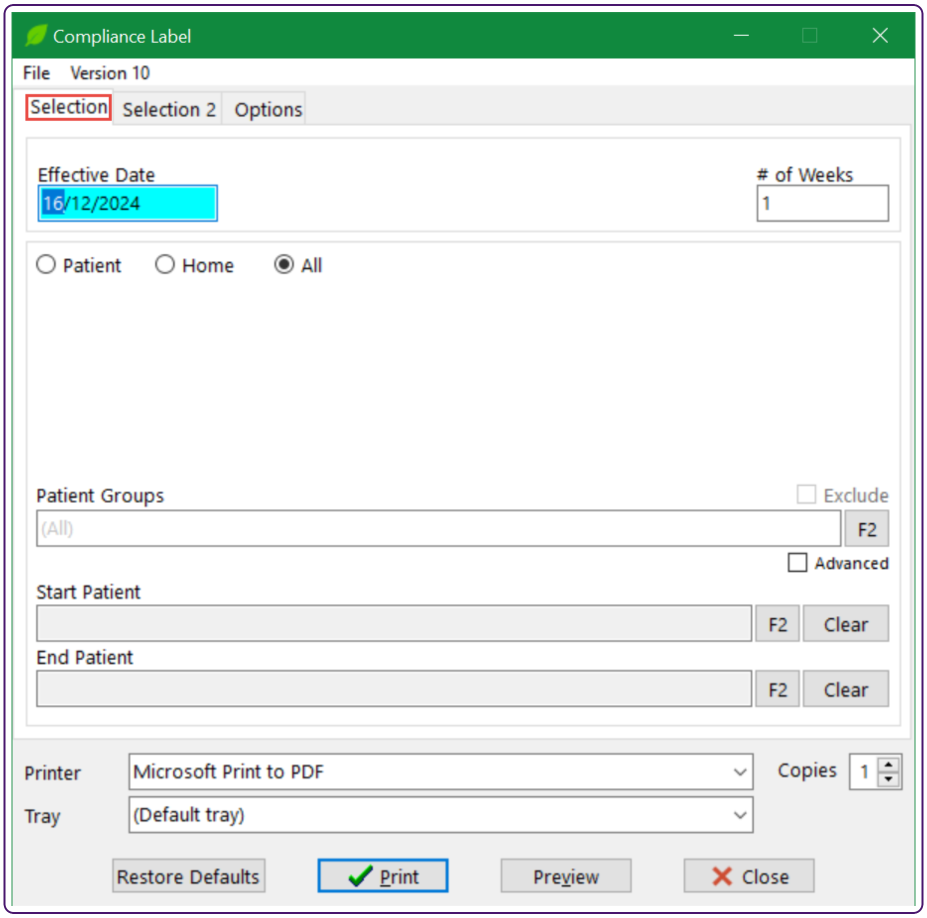
Mfr	Drug	Generic Name	DIN	# of Rxs	Qty	On Hand
AZC	Atacand 4mg TAB	Candesartan Cilexetil	02239090	3	30	-311
AZC	Crestor 5mg TAB	Rosuvastatin Calcium	02265540	1	10	-20

Compliance Label report

The **Compliance Label** report works in conjunction with the Unit Dose feature found at the prescription level. You can use it to create compliance labels for 7-day pill packs that can be affixed to Jones Box compliance packages, thus replacing the need to print a label for every Rx.

1. From the menu, select **Reports** > **Patient** > **Compliance Label.**

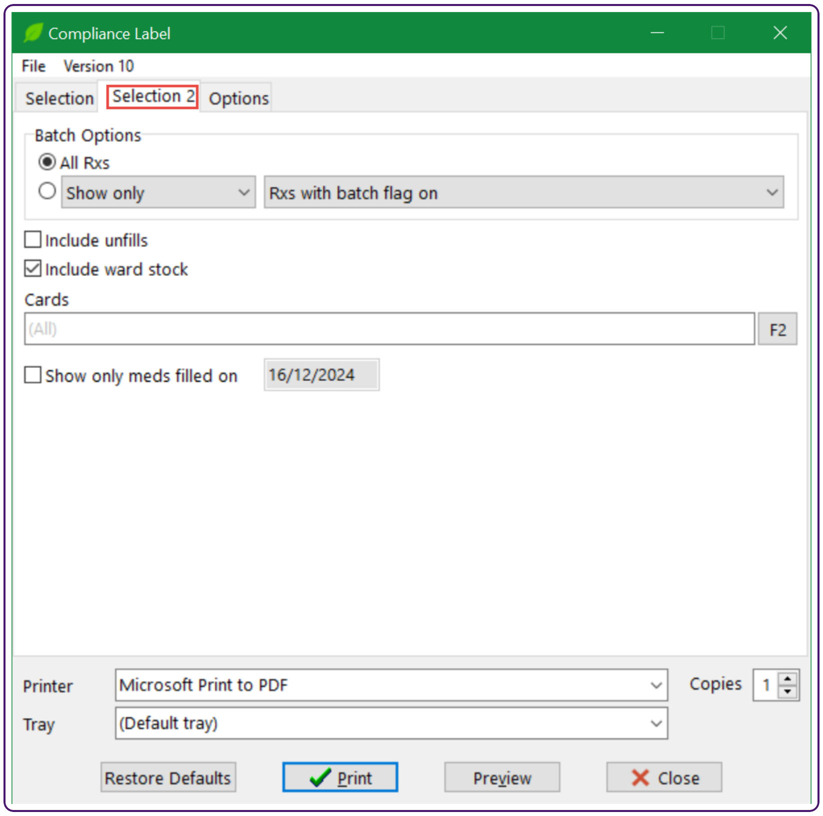
   The **Compliance Label** report form is displayed.



2. From the **Selection** tab:
   - Enter the **Effective Date** of the first package, if it differs from today's date.
   - In the **# of Weeks** field, enter the number of cycles you want to run the report.
   - To generate the report for specific patients only, select the **Patient** button and click **Add**. Search for and select the patient you want to include in the report.
   - To generate the report for specific nursing homes only, select the **Home** button and select **Add**. Select the **Home** and applicable **Ward** and select **OK**.

     Repeat this step for each home you want to include in the report.
   - Use the **F2** button next to the **Patient Groups** field to select the patient groups you want to include in the report.

3. From the **Selection 2** tab:

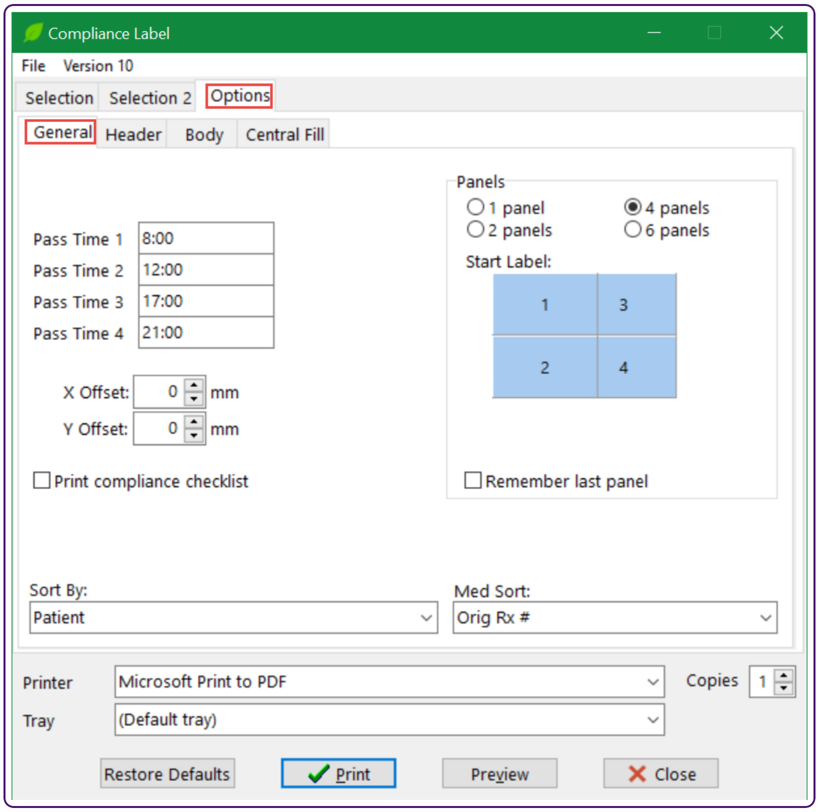


- To include all of the Rxs in the patient profile in the report, select **All Rxs**, otherwise select **Show only** or **Exclude** and then select an Rx type.
- To add all Unit Dose unfills in the patient profile included in the report, select **Include unfills**.

  This is especially helpful if you have copied to a new number and put a prescription on hold.
- To include Rxs marked as ward stock for nursing home patients, select **Include ward stock**.
- Use the **F2** button next to the **Cards** field to select the cards you want to include in the report (optional).

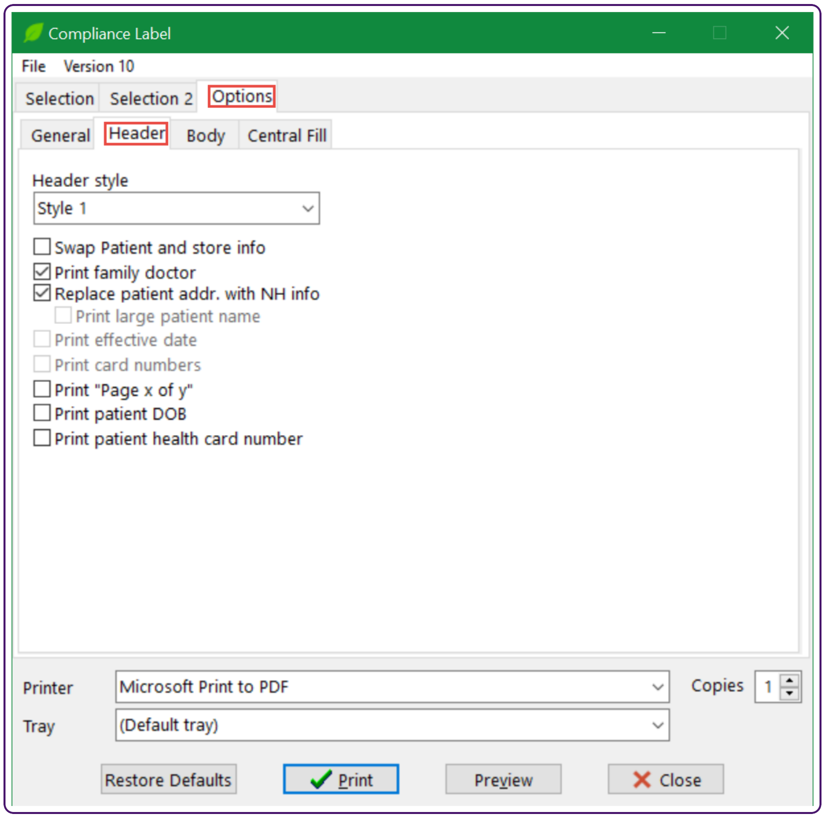
  This is used for prescriptions that have been separated by a card number.
- To include Rxs filled on a particular date only, select **Show only meds filled on** and enter the specific date.

4. From the **Options** > **General** tab:



- Optionally change the **Pass Time** fields, which are set by default.
- In the **Panels** section, specify the number of panels you want printed on each page. This is particularly important if you have pre-defined compliance labels in a 2, 4, or 6-panel layout.
- Use the **X Offset** and **Y Offset** controls to adjust the layout of the report; **X Offset** controls left justification and **Y Offset** controls vertical alignment.
- To include a check list for packaging the compliance packages, select **Print Compliance Checklist**.
- Use the **Sort By** field to specify how you want the report to be organized.
- Use the **Med Sort** field to specify the order in which the compliance label will be printed.

5. From the **Options** > **Header** tab:

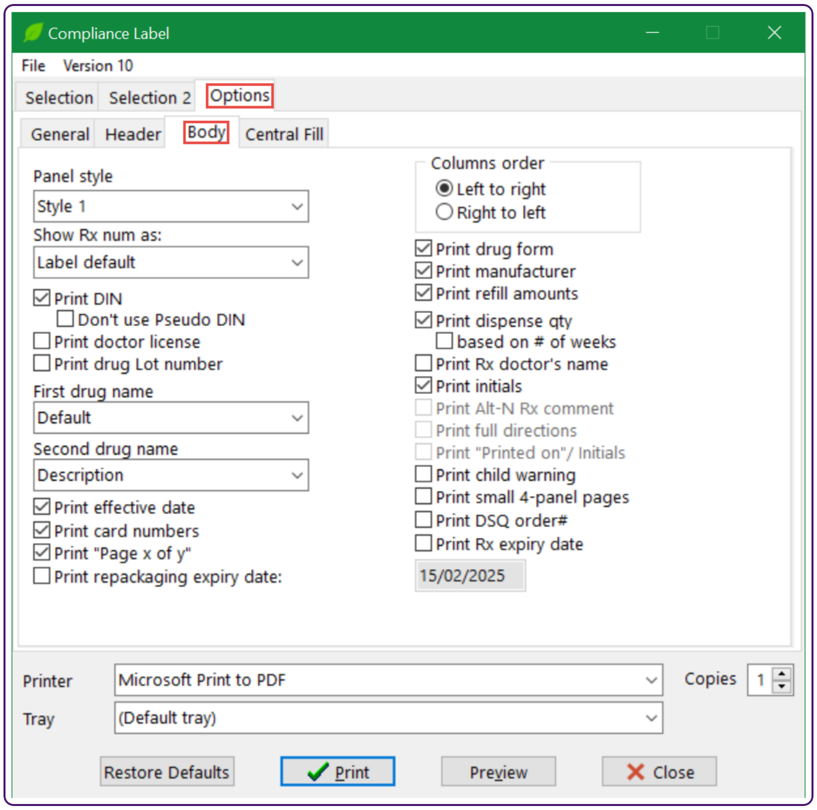


- Select the **Header style**.
- To change the position of the patient and store information on the report, select **Swap Patient and store info**.
- To include the family doctor on the report, select **Print family doctor**.

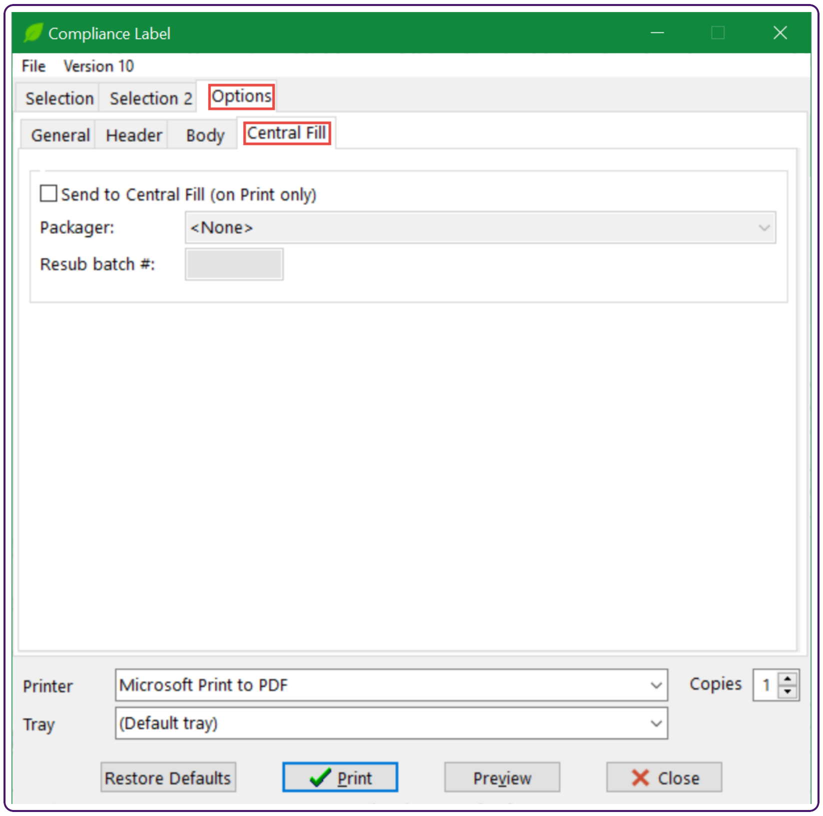
  This information comes from the **Family Doctor** field on the patient card.
- To replace the patient's address with the nursing home information, select **Replace patient addr. with NH info**.
- To print the patient's name in large font, select **Print large patient name**.
- To include the effective date of the compliance package, select **Print effective date**.
- To include the assigned card numbers in the unit dose section of the prescription, select **Print Card Numbers**.
- To print page numbers in the upper right hand corner of the report, select **Print “Page x of y”**.

6. From the **Options** > **Body** tab, select the options you want included in the report.

   The options on this tab vary according to the selected **Panel style**. The following image shows the options available for **Style 1**.

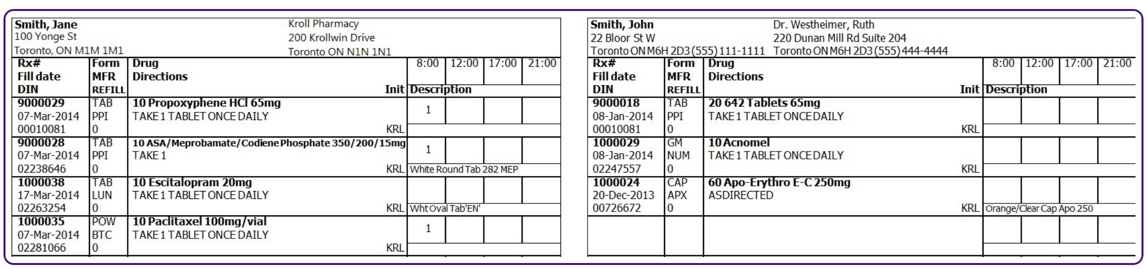


7. From the **Options** > **Central Fill** tab:



- Optionally select Send to Central Fill, then do the following:
  - Select the Central Fill host **Packager**.
  - In the **Resub batch #**, enter the number of the batch you want to resubmit.

8. Select **Preview** to preview the report or **Print** to generate a printout of the report.



Smith, Jane
100 Yonge St
Toronto, ON M1M 1M1

Kroll Pharmacy
200 Krollwin Drive
Toronto ON N1N 1N1

Rx# Fill date DIN	Form MFR REFILL	Drug Directions	Init	8:00	12:00	17:00	21:00	Description
9000029 07-Mar-2014 00010081	TAB PPI 0	**10 Propoxyphene HCl 65mg** TAKE 1 TABLET ONCE DAILY	KRL	1				
9000028 07-Mar-2014 02238646	TAB PPI 0	**10 ASA/Meprobamate/Codiene Phosphate 350/200/15mg** TAKE 1	KRL	1				White Round Tab 282 MEP
1000038 17-Mar-2014 02263254	TAB LUN 0	**10 Escitalopram 20mg** TAKE 1 TABLET ONCE DAILY	KRL					Wht Oval Tab'EN'
1000035 07-Mar-2014 02281066	POW BTC 0	**10 Paclitaxel 100mg/vial** TAKE 1 TABLET ONCE DAILY	KRL	1				

Smith, John
22 Bloor St W
Toronto ON M6H 2D3 (555) 111-1111

Dr. Westheimer, Ruth
220 Dunan Mill Rd Suite 204
Toronto ON M6H 2D3 (555) 444-4444

Rx# Fill date DIN	Form MFR REFILL	Drug Directions	Init	8:00	12:00	17:00	21:00	Description
9000018 08-Jan-2014 00010081	TAB PPI 0	**20 642 Tablets 65mg** TAKE 1 TABLET ONCE DAILY	KRL					
1000029 08-Jan-2014 02247557	GM NUM 0	**10 Acnomel** TAKE 1 TABLET ONCE DAILY	KRL					
1000024 20-Dec-2013 00726672	CAP APX 0	**60 Apo-Erythro E-C 250mg** ASDIRECTED	KRL					Orange/Clear Cap Apo 250

Chapter 30

Report discrepancies explained

Report discrepancies may occur if multiple systems are used to measure various pharmacy metrics. This section explains how to identify and resolve discrepancies, and how to minimize them in the future.

Fill and adjudication dates

Each Rx has multiple date components, including one fill date, which may have been backdated. Each plan associated with the Rx also has an adjudication date:

- For paper plans, the adjudication date is typically equal to “today”.
- For real-time plans, the adjudication date is returned by the third party.

Each Rx may have multiple real-time third party plans, in which case, the adjudication dates will fall on different days. In most cases, the fill and adjudication dates match. It is those exceptions that can appear to throw off certain reports. This is especially true with backdated Rxs; the fill date may be set to an earlier day, but the adjudication date is still “today”.

When you are comparing reports, refer to the report header to determine if the report was based on the fill or adjudication date. Do not compare a fill date report against an adjudication date report. They might initially match up, but over a large period, they likely will not.

> Most Rx-based reports use the fill date and most plan-based reports use the adjudication date. The Plan Summary report, which was created to enable retail clients to count the number of Rxs filled for each plan, is an exception. It is effectively an Rx-based report that is broken down by plan, which is usually based on the adjudication date. As a single Rx can contain multiple plans, the Rx is counted once. The Rx is attributed to either the first paying plan or the primary plan, depending on which option you select. Do not compare this report to other plan-based reports, as it will not balance. Please note the disclaimer on the bottom of this report, which asks that you do not use this report to reconcile your third party claims.

Reversals and net totals

All of the reports include reversal amounts, which are subtracted from the forward amounts to provide the net totals. Typically, Rxs that were filled and reversed within the report date range are excluded from the totals. If you see a reversal amount, it means the Rx was reversed during the report period but was originally filled prior to the report period. For example, an Rx that was filled in January and reversed in February is included in a January report as a forward claim and a reversal in a February report, but is excluded from a report that encompasses both January and February.

Most reports identify these prior period reversals as Reversals or Prior Day Reversals, which should be read as prior *period* reversals. The Adjudication Totals report differs; it separates reversals into “same day” and “prior day” reversals. Even if this report is run for a monthly period, Rxs reversed on a day other than the day they were filled are counted in the “Prior Day” column. This report is intended to match exactly with the values returned by real-time third party plans when requesting on-line daily summaries. If you compare this report against another adjudication date-based report, the reversals count may not match, as the other reports use the entire report date range to determine if a reversal falls outside of the entire range.

Backdates

If you run two reports based on a fill date and for the same date range--one immediately after the completion of a period, and one at a later date--the reports may not match due to backdates. A backdate is the only way that a report run in the past can effectively be changed in the future.

When reconciling reports, especially fill-based reports, always use reports that are printed on the same date and at approximately the same time. If you have specific reporting periods and an Rx is backdated to a previous period, you might want to manually record this Rx on a form so it can be properly reconciled. Kroll records the real date (today) when a backdate takes place and this is noted on some of the reports.

> Date-based adjudication reports are not affected by backdating, as the adjudication date for the Rx's plan is always today, unless the real time third party should happen to return a different date, as it might for an Rx filled after midnight, Eastern time.

Claims Invoice report

Net amount representation

When a claim is submitted to a third party insurer, the amount billed on the invoice may include the local patient co-payment amount, depending on the insurer.

By default, Kroll includes the co-payment amount in the **Net** column, as this is the preference of most third party insurers. The net amount is also shown in the summary sections of the report. All other Kroll reports show the amount being billed to that third party, exclusive of the local patient co-payment. If any of your third parties are set to the default and you attempt to match the report summary of the **Claims Invoice** report with another report showing the amount billed to the third party, the amounts will not appear to match if co-payments are involved.

If your paper plans need to use the non-default configuration (that the net amount should not include the co-payment value), please contact TELUS Health for assistance in setting up each third party to use the paper claim Net amount reporting option for each affected plan. Only if all third party plans are set to the non-default setting will the report's grand total Net amount balance with other plan-based Kroll reports. As this is unlikely, you will not be able to match the Net amount on this report with that on other reports.

When running this report, do not select the **Include data for real-time plans**option. Other reports, such as the **Adjudication Totals** report, are more suitable for reporting real-time plan totals.

Third party plan imbalances

For each third party claim, the cost, mark up, fees, totals, and other cost values are shown, unless you hid them via the report form. These values are entities of the Rx as a whole, so if the same Rx has another plan that is being billed during the same date range used by the report, the same cost values are shown for that plan. These values are subtotalled for each plan. In the overall report summary, each plan is shown and the grand total for the report is the sum of all the subtotals.

For example, if you had a single Rx for $100 that was billed to two different plans, both of which are included in this report, then the subtotal for each plan would show total of $100 for each claim, and the report grand total would add these together to produce a grand total of $200. This anomaly in this report's grand totals means the grand total will not balance with other reports.

Reconciling

Reconciliation is the process of balancing one report against another. For fill date-based reports, you can run the following on the same day for any range and they should all balance:

- Daily/Monthly Totals
- Rx Breakdown
- Rx Totals
- Profit/Loss

For adjudication date-based reports, run the following:

- Plan Breakdown (do not check any of the “Exclude” options)
- Adjudication Totals (do not exclude “zero-amount” claims)

When running the Claims Invoice report, it is best to deselect **Include items where plan pays 0.00** and **Include data for real-time plans** as this helps to eliminate most tertiary plan billing that will misrepresent the grand totals, as noted above. The grand total on this report matches the manual plan amounts on the Plan Breakdown and Adjudication Totals reports.

Summary

The following key points were noted above:

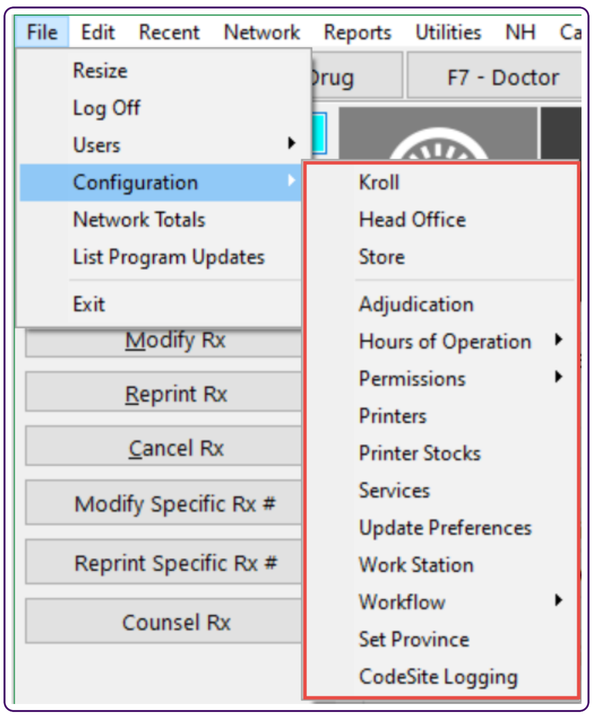
- Do not compare fill date-based reports with adjudication date-based reports. When in doubt, look at the report header to determine which date is being used.
- Do not compare the Plan Summary report with other reports.
- Always compare reports printed on the same date. Refer to the **Printed On** date on the report header.

- Be aware of how previous-period reversals are reported. Always use the “Net” amount columns when comparing reports.

Chapter 31

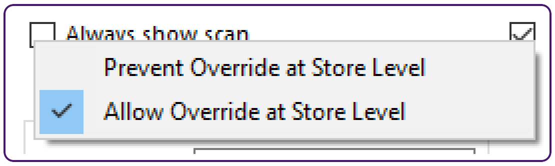
Configuration

This section explains each of the configuration settings that are available in the Kroll application. The configuration windows are accessed via **File** > **Configuration**.



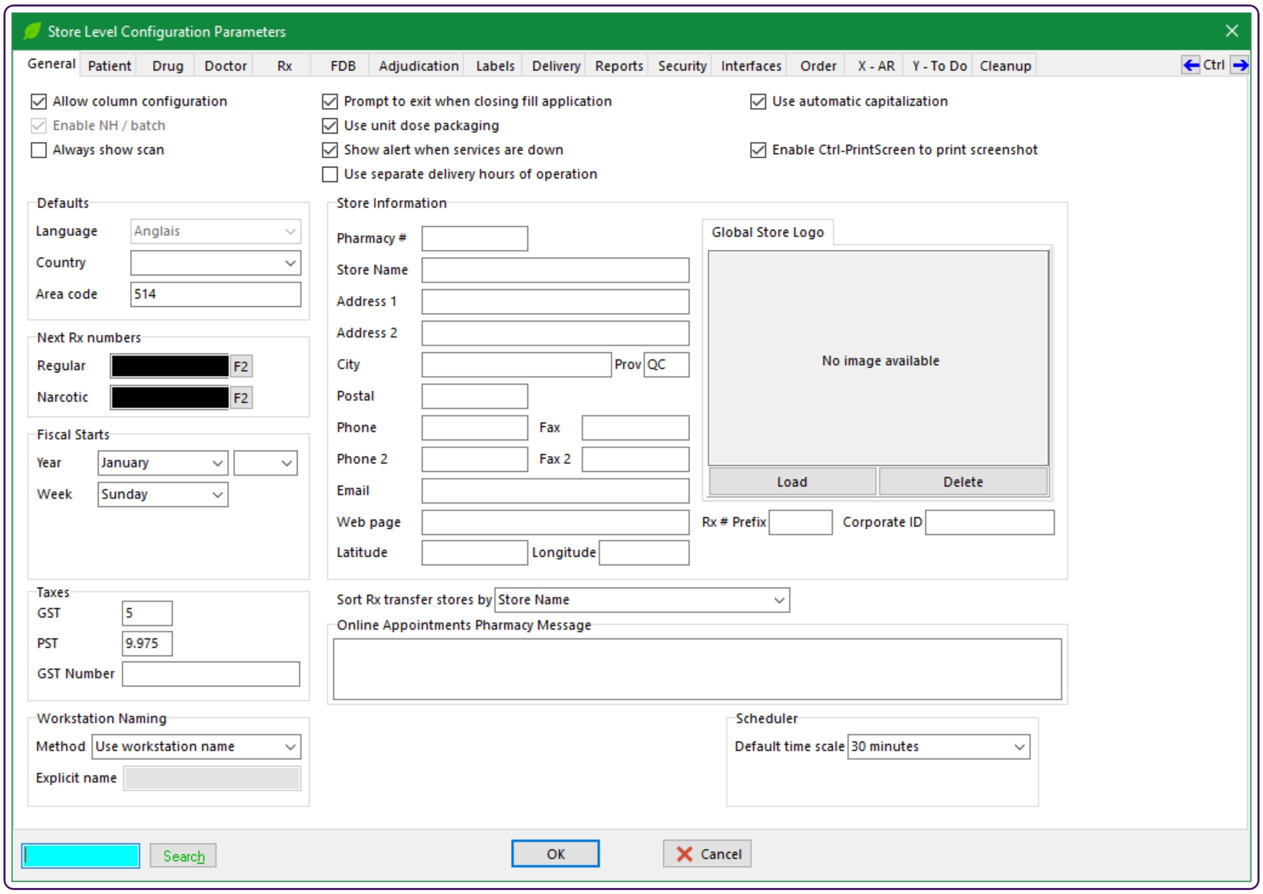
Store- and head office-level configuration

The store- and head office-level configuration windows are similar, but not identical. There are some small differences, especially for chain locations. In the head office configuration window, you can right click a setting to lock it down so it cannot be changed at the store level. Locked settings are shown in red on the head office-level configuration window and disabled on the store-level window.



This is used to enforce business rules for chains that want stores to have the same level of access to the settings.

General



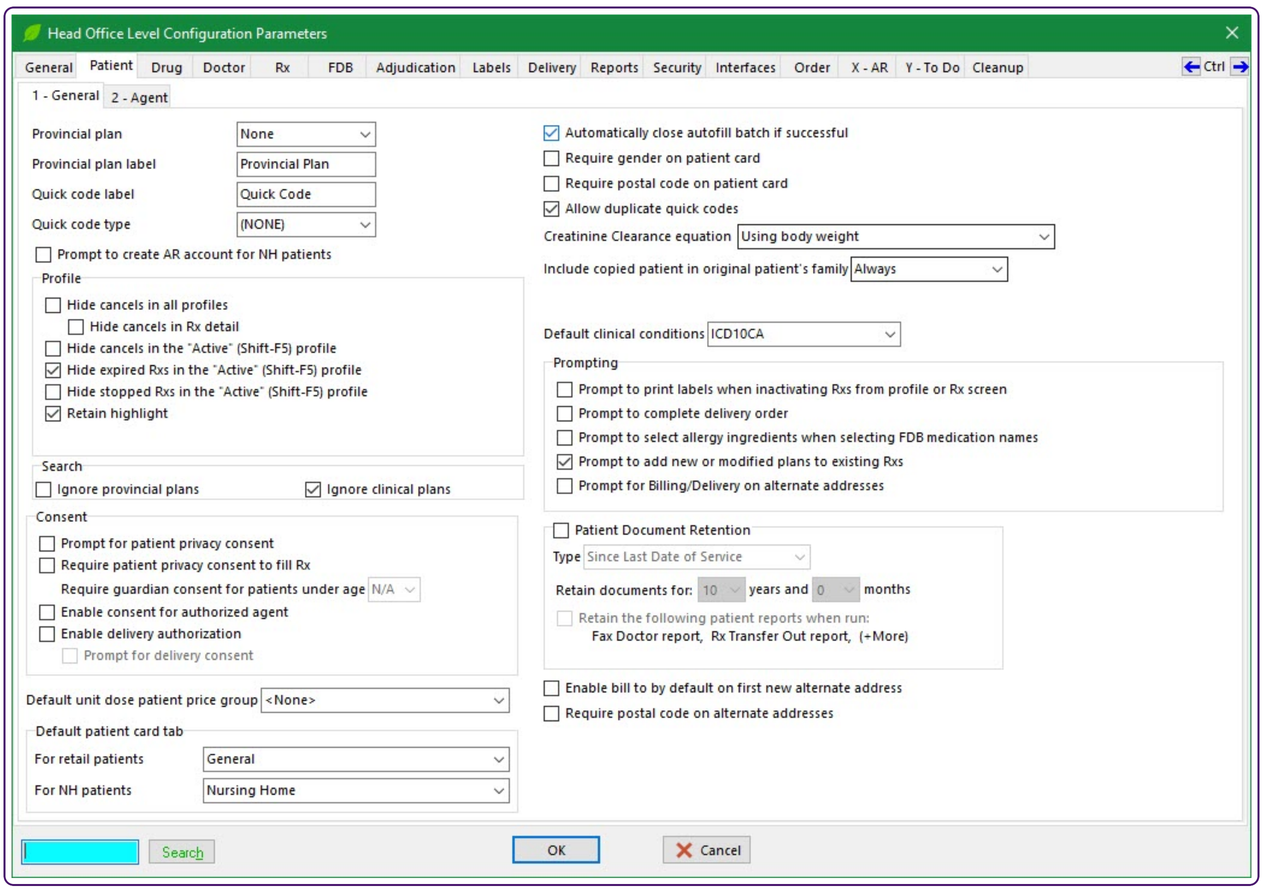
The following table describes the configuration settings on the **General** tab.

Name	Description
Allows Column Configuration	Enables users to change the appearance of the pre-set columns on the F3, F5 and F7 windows. *
Enable NH / Batch	Enables users to access to the basic nursing home module, which means they can use batch filling, as well as plain paper MARs and TMRs.
Always show scan	If selected, the **Scan** button is enabled for searches. If this button is selected, the user's changes are saved and the search window is displayed.

Name	Description
Prompt to exit when closing fill application	If selected, when users exit Kroll, they are prompted to confirm they want to exit, and asked whether they want to print the Day End Label and the Network Totals.
Use Unit Dose Packaging	If selected, users can choose the unit dose packaging at the patients card level. They can then set the type of unit dose and the cycles when medication is to be filled, and set up specific strategies for pricing on unit dose prescriptions.
Show alert when services are down	If selected, a warning is displayed to users when the pharmacy server is down.
Use separate delivery hours of operation	If selected, the store's delivery hours are shown separately from its hours of operation.
Use automatic capitalization	If selected, the first character of each word is capitalized when filling out a form.
Enabled Ctrl-Print window to Print Screenshot	If selected, the print window function is enabled.
Language	The default language for all patient records. You can change this for individual patient records.
Country	The default country for all patient and prescriber records. You can change this for individual patient and prescriber records.
Area code	The default area code for all patient and prescriber records. If this is set and a patient or prescriber is added, this area code prefix is automatically added to all seven-digit numbers. You can change this for individual patient and prescriber records.
Regular	The next prescription number the system will use when filling a regular prescription.
Narcotic	The next prescription number the system will use when filling a narcotic prescription.
Fiscal Starts	The day the store's fiscal year starts on.
GST, PST, HST	The tax percentages. Most Rxs are non-taxable, except for veterinary prescriptions, as well as some charges to AR accounts.
GST Number	The government sales tax number for tax purposes.
Method	The type of name used to identify the workstation.
Explicit Name	The name of the workstation.
Pharmacy #	The pharmacy number.
Store Name	The name of the pharmacy.
Address 1, **Address 2**, **City, Postal**	The pharmacy's address.
Phone, **Phone 2**	The pharmacy's phone number.
Fax, **Fax 2**	The pharmacy's fax number.

Name	Description
Email	The pharmacy's email address.
Web page	The pharmacy's web page.
Latitude and **Longitude**	The longitude and latitude of the store location.
Sort Rx transfer stores by	The sequence in which to sort stores that are available for transfer.
Online Appointments Pharmacy Message	A message displayed to patients when they are booking appointments with the pharmacy.
Global Store Logo	The store's logo.
Rx # Prefix	A prefix applied to Rxs for the specific store.
Corporate ID	The store's corporate ID.
Default time scale	The default appointment duration.

Patient



1 - General tab

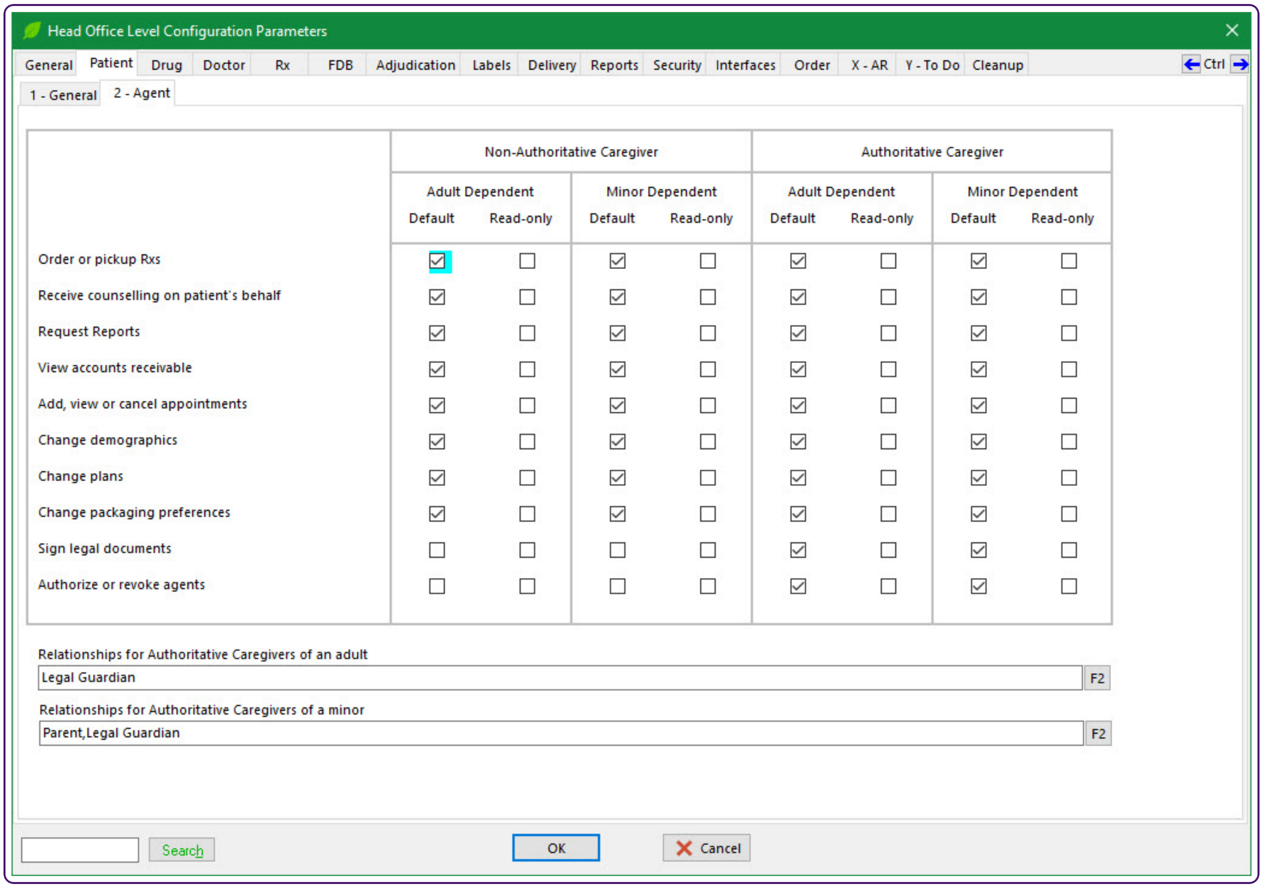
The following table describes the configuration settings on the **Patient** > **1 - General** tab.

Name	Description
Provincial plan	Your province, for use on the F3 Patient window.
Provincial plan label	The default plan name, for use on the F3 Patient window.
Quick code label	A code that can be used when searching for drugs from the **F3 - Patient** window. This field can also be used to store reward card numbers.
Quick code type	The program the quick code represents.
Prompt to create AR account for NH patients	If selected, the user is prompted to create an AR account for a patient when the patient is assigned to a nursing home.
Automatically close autofill batch if successful	If selected, the batch fill window is closed after the batch is completed.
Require gender on patient card	If selected, the gender field on the patient profile is required.
Require postal code on patient card	If selected, the postal code field on the patient profile is required.
Allow duplicate quick codes	If selected, quick codes can be reused.
Creatinine Clearance equation	The method used to calculate creatinine clearance is calculated.
Include copied patient in original patient's family	Whether patients will be linked from the F3 window (always, never, or prompted).
Default clinical conditions	The default clinical condition database.
Hide cancels in all profiles	If selected, cancelled Rxs are hidden in the patient profile.
Hide cancels in Rx detail	If selected, cancelled Rxs are hidden in the Rx detail.
Hide cancels in the "Active" (Shift-F5) profile	If selected, cancelled Rxs are hidden from the Active Rxs view.
Hide expired Rxs in the "Active" (Shift-F5) profile	If selected, expired Rxs are hidden from the Active Rxs view.

Name	Description
Hide stopped Rxs in the "Active" (Shift-F5) profile	If selected, stopped Rxs are hidden from the Active Rxs view.
Retain highlight	If selected, any Rxs highlighted in the patient profile will remain highlighted after you modify them.
Ignore provincial plans	If selected, provincial plans are ignored when searching for patients.
Ignore clinical plans	If selected, clinical plans are ignored when searching for patients.
Prompt to print labels when inactivating Rxs from profile or Rx screen	If selected, a prompt is displayed, asking if you want to print a label set when inactivating an Rx.
Prompt to complete delivery order	If selected, you are prompted to complete a delivery order, if applicable.
Prompt to select allergy ingredients when selecting FDB medication names	If selected, you are prompted to select allergy ingredients when you select FDB medication names.
Prompt to add new or modified plans to existing Rxs	If selected, a prompt is displayed on the F12 window when a new plan has been entered into the patient's profile but has not been used for previous Rxs.
Prompt for Billing/Delivery on alternate addresses	If selected, a prompt is displayed for billing/delivery when an alternate address is used.
Prompt for patient privacy consent	If selected, a patient privacy consent message is displayed when information is added to the patient profile. This message is displayed until the pharmacy records whether the patient has given consent to record their information locally or on the network. Users can choose Unknown, Written, Verbal, or No Consent. Once an option is selected, the privacy consent message no longer displays for that patient.
Require patient privacy consent to fill Rx	If selected, users must respond to the patient privacy consent message before they can fill a prescription.
Require guardian consent for patients under age X	The age under which patients need guardian consent.

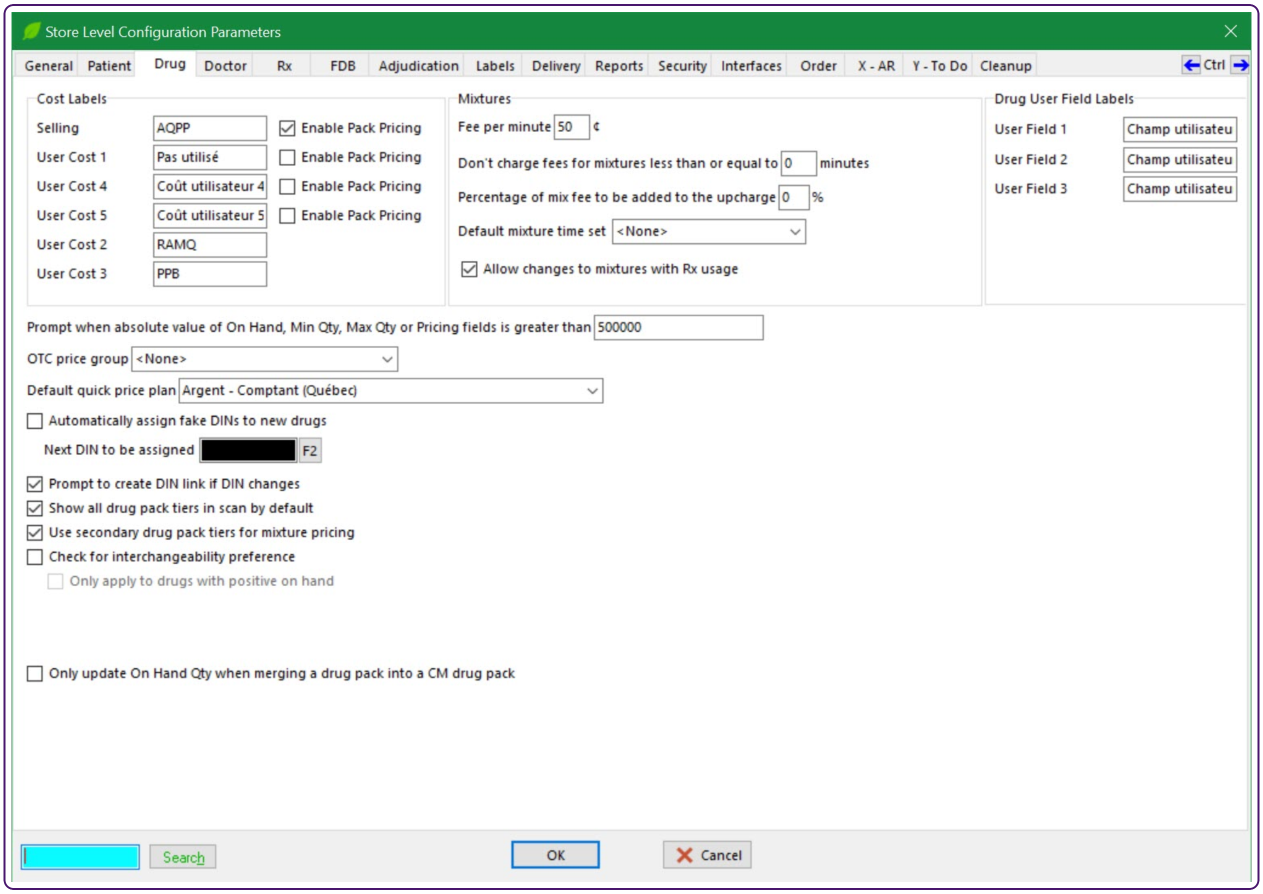
Name	Description
Enable consent for authorized agent	If both this checkbox and the **Configuration** > **Kroll** > **Modules** > **Enhanced consent** checkbox are selected, consent records are inserted, deleted, or revoked when an agent is inserted, deleted, or revoked.
Enable delivery authorization	If selected, delivery authorization is enabled.
Prompt for delivery consent	If selected, the user is asked if they want to complete the delivery consent.
Patient Document Retention	If selected, patient documents are retained as per the criteria set below.
Type	The type of date used when calculating the retention period.
Retain documents for X years and X months	The number of years and months documents are retained.
Retain the following patient reports when run	If selected, selected patient reports are retained after they are run.
Default unit dose patient price group	The unit dose patient price group used by default.
For retail patients and **For NH patients**	The default patient card tab for retail patients and NH patients, respectively.
Enable bill by default on first new alternate address	If selected, the patient's AR account is automatically billed to the alternative address entered on the F3 window.
Require postal code on alternate addresses	If selected, the postal code must be entered when an alternate address is entered.

2- Agent tab



The table on this tab is used to specify the permissions granted to authoritative and non-authoritative caregivers. The types of relationships that represent authoritative caregivers for adults and minors are identified using the fields at the bottom of this window. The relationships that are not selected are considered non-authoritative caregivers.

Drug

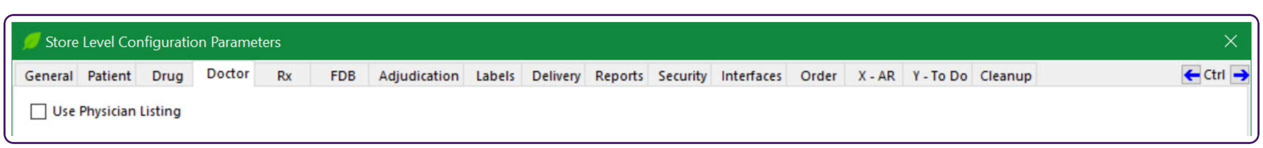


The following table describes the configuration settings on the **Drug** tab.

Name	Description
Selling	The label for the selling cost.
Enable Pack Pricing	If selected, pack pricing is enabled for the selected label.
User Cost 1, **User Cost 2**, **User Cost 3**, **User Cost 4**, **User Cost 5**	One of these fields is automatically assigned as the purchase price; the next four can be adjusted. Their values vary depending on which vendor is used or if provincial pricing is used instead. For example, in an Ontario pharmacy, you might see: ▪ User Cost 0 Label – McKesson ▪ User Cost 1 Label – K&F ▪ User Cost 2 Label – ODB (BAP) – This is locked down for Ontario ▪ User Cost 3 Label – ODB (MAC) – This is locked down for Ontario (BAP = Best available Price MAC = Maximum Allowed Cost)
Fee per minute	The default amount that will be charged per minute for preparing a mixture. This must be entered in cents.

Name	Description
Don't charge fees for mixtures less than or equal to X minutes	If a mixture takes less than or equal to this time to make, no charge is applied for its preparation, by default.
Percentage of mix fee to be added to the upcharge X%	The percentage of the mix fee to be hidden in the markup of the Rx.
Default mixture time set	The default time assigned to mixtures.
Allow changes to mixtures with Rx usage	If selected, you can make changes to the mixture card with each Rx.
User Field 1, User Field 2, User Field 3	The names of the user fields displayed on the "Other tab" (page 127)
Prompt when absolute value of On Hand, Min Qty, Max Qty or Pricing fields is greater than X	If the value of the On Hand, Min Qty, Max Qty or Pricing fields is greater than the value of this field, an exception error is displayed when doing an automatic order.
OTC price group	The default drug price group to apply to all OTC schedule drugs.
Default quick price plan	The default plan for the quick price plan.
Automatically assign fake DINs to new drugs	If selected, fake DINs are assigned to new drugs if DINs are not entered. If a drug product has a DIN, ensure it is entered in the F5 drug window.
Next DIN to be assigned	The first number in the range of fake DINs to assign to new drugs without real DINs.
Prompt to create DIN link if DIN changes	When a DIN on a drug card changes, this option links the DINs under **Edit** > **Din Links** on the **F5** window. This ensures that when you search for a drug by DIN, the old DIN is still linked to it.
Show all drug pack tiers in scan by default	If selected, when searching for drugs in the F5 window, multiple tiers are shown.
Use secondary drug pack tiers for mixture pricing	If selected, the system chooses the secondary tier to price mixtures.
Check for interchangeability preference	If selected, the drug database is checked for interchangeable drugs.
Only apply to drugs with positive on hand	If selected, and a lower priority drug with a positive on-hand value is selected during drug refill, the user is not prompted to select a higher interchangeable product.
Only update On Hand Qty when merging a drug pack into a CM drug pack	If selected, on hand quantities are only updated when you merge into a centrally maintained drug pack.

Doctor

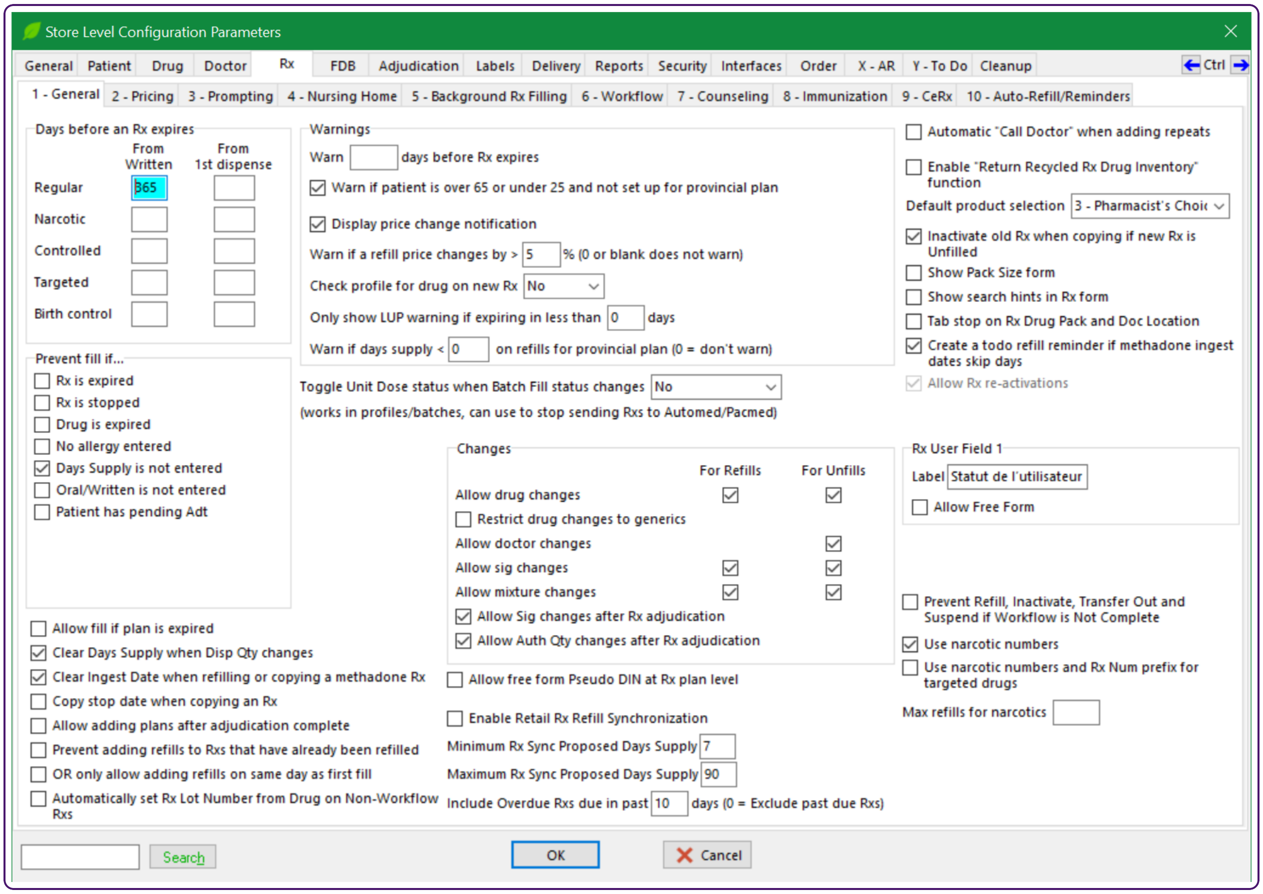


If **Use Physician Listing** is selected, users can select a doctor from the menu under **Doctors** > **Doctor Listing**.

Rx

The following section describes the configuration settings available on the **Rx** tab.

General



The following table describes the configuration settings on the **Rx** > **General** tab.

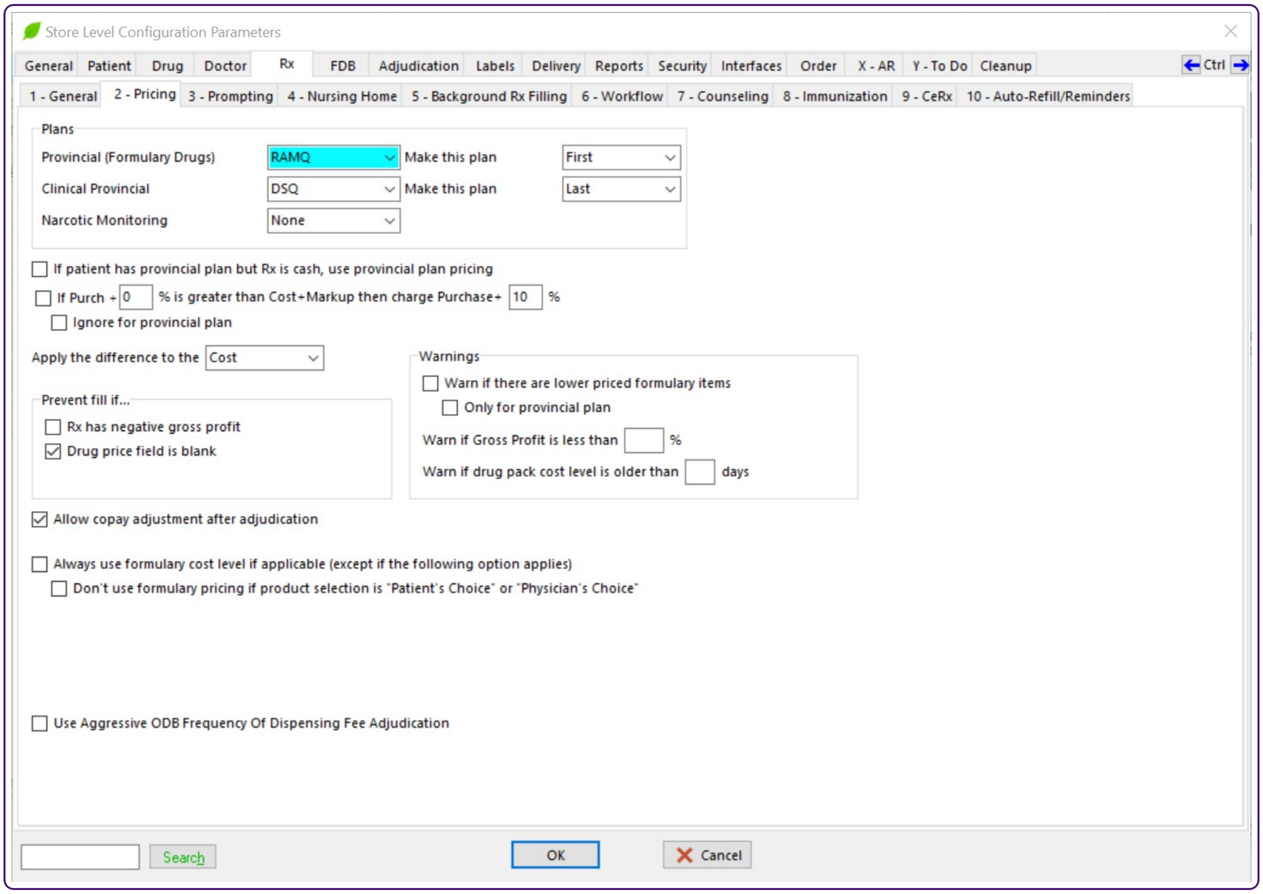
Name	Description
Days Before an Rx expires section	The expiry date for different types of prescriptions (regular, narcotic, controlled, targeted, and birth control), based on the date the prescription was written and first dispensed. In some provinces, this is automatically populated because the provincial legislation states that an Rx expires after a specified number of days. Typically, expiry values are set for narcotic, controlled, and targeted prescriptions.
Warn X days before Rx expires	The number of days before a prescription is to expire that a yellow yield sign is displayed on the Rx window. The default is 90.

Name	Description
Warn if patient is over 65 or under 25 and not set up for provincial plan	If selected, a warning is displayed if the patient is 65 years or older and no provincial plan is selected in their profile.
Display price change notification	If selected, a prompt is displayed if the last Rx had a manual price. You will need to decide if you want to use the old manual price or the new calculated price.
Warn if a refill price changes by > X%	Displays a warning message in the Rx window if the price of the Rx has changed by more than the specified percentage. The default value is 5%.
Check profile for drug on next Rx	Whether to check the patient record to determine if they took the drug before.
Only show LUP warning if expiring in less than X days	The start of the expiration range for LUP warnings. The default is 120 days.
Warn if days supply < X on refills for provincial plan	Displays a warning if the days supply is less than the specified number for refills on provincial plans. This is used if the provincial government does not accept certain a days’ supplies.
Automatic "Call Doctor" when adding repeats	If selected, a ToDo to call the doctor is created when repeats are added to an existing Rx.
Enable "Return Recycled Rx Drug Inventory" function	If selected, drugs can be returned to the inventory. This is only available in some provinces.
Default product selection	The default product selected (none, prescriber's choice, patient's choice, pharmacist's choice, or existing therapy).
Inactivate old Rx when copying if new Rx is Unfilled	If selected, when a new Rx is brought to the pharmacy, the old Rx is inactivated and can no longer be filled.
Show Pack Size form	If selected, a prompt is displayed on the F12 window when there is more than one pack size that is active on the drug card that belongs to the same tier.
Show search hints in Rx form	If selected, the yellow hint boxes are shown on the F12 filling window, in the patient, drug, and doctor sections.
Tab stop on Rx Drug Pack and Doc Location	If selected, you can press Tab while filling an Rx to cycle through the fields, and stop on drug pack and doctor location.
Create a todo refill reminder if methadone ingest dates skip days	If selected, a refill reminder and a refill to do item are created whenever there is a gap in-between the patient’s ingest dates.

Name	Description
Prevent Fill if Rx Expired section	If any of the checkboxes in this section are selected, prescriptions cannot be refilled if the name of the checkbox is true. For example, if **Rx is expired** is selected, expired prescriptions cannot be refilled.
Toggle Unit Dose status when Batch Fill Status changes	To stop sending Rxs to Automed/Pacmed, or prompt the user, set this to Yes or Prompt, respectively. This only applies to profiles/batches
Allow drug changes, **Allow sig changes**, **Allow mixture changes**	Use these options to specify if changes can be made to the drug, sig, and mixture parts of a prescription, for refills and unfilled Rxs.
Restrict drug changes to generics	If selected, only generic drugs can be changed.
Allow Sig changes after Rx adjudication	If selected, you can change the sig code for the Rx even if the Rx has already been adjudicated.
Allow Auth Qty changes after Rx adjudication	If selected, you can change the authorized quantity for the Rx post-adjudication.
Rx User Field 1	The label used for the RX User Field 1, which is displayed on the **F12** > **Other** tab.
Allow Free Form	If selected, the Rx User Field 1 accepts free form text.
Allow fill if plan is expired	If selected, the pharmacy can send an Rx to the drug plan even if the drug plan is marked as expired on the F3 window.
Clear Days Supply when Disp Qty changes	If selected, and the quantity dispensed changes, you must re-enter the days' supply.
Clear Ingest Date when refilling or copying an Rx	If selected, the ingest date is cleared when a methadone prescription is being entered, so a new ingest date can be entered.
Allow adding plans after adjudication complete	If selected, plans can be added after a claim is adjudicated.
Prevent adding refills to Rxs that have already been refilled	If selected, you cannot change the authorized quantity on an Rx once the Rx has already been filled.
OR only allow adding refills on same day as first fill	If selected, you can change the authorized quantity only on the day the Rx was originally filled.

Name	Description
Automatically set Rx Lot Number from Drug on Non-Workflow Rxs	If selected, the lot number is automatically set for drugs that do not go through workflow packaging.
Allow free form Pseudo DIN at Rx plan level	If selected, you can add a free form DIN and plan information at the Rx level.
Enable Retail Rx Refill Synchronization	If selected, patients' Rx fill dates can be synchronized, if they are eligible.
Minimum Rx Sync Proposed Days Supply	The minimum threshold for Rx synchronization. The system will not suggest synchronizing to an Rx that would cause the current prescription's days' supply to be anything less than this value.
Maximum Rx Sync Proposed Days Supply	The maximum threshold for Rx synchronization. An existing prescription with its next refill due beyond this many days is not considered a candidate for synchronization. Note that this value is further reduced by the days' supply of the current Rx. For example, if this is set to 90 days but the current Rx is only for an initial 30-day supply, only those existing Rxs with due dates of 30 days or less are eligible for synchronization.
Include Overdue Rxs due in past X days	The number of days in the past an Rx can be overdue and still be included in the Rx. If this field is set to 0, past due Rx are excluded.
Prevent Refill, Inactivate, Transfer Out and Suspend if Workflow is Not Complete cut off)	If selected, Rxs cannot be refilled, inactivated, transferred out, or suspended if the workflow is not complete.
Use narcotic numbers	If selected a separate range of numbers is used for narcotic prescriptions.
Use narcotic numbers and Rx Num prefix for targeted drugs	If selected, uses narcotic numbers for targeted prescriptions.
Max refills for narcotics	Specifies how many refills are permitted for narcotic Rxs.

Pricing

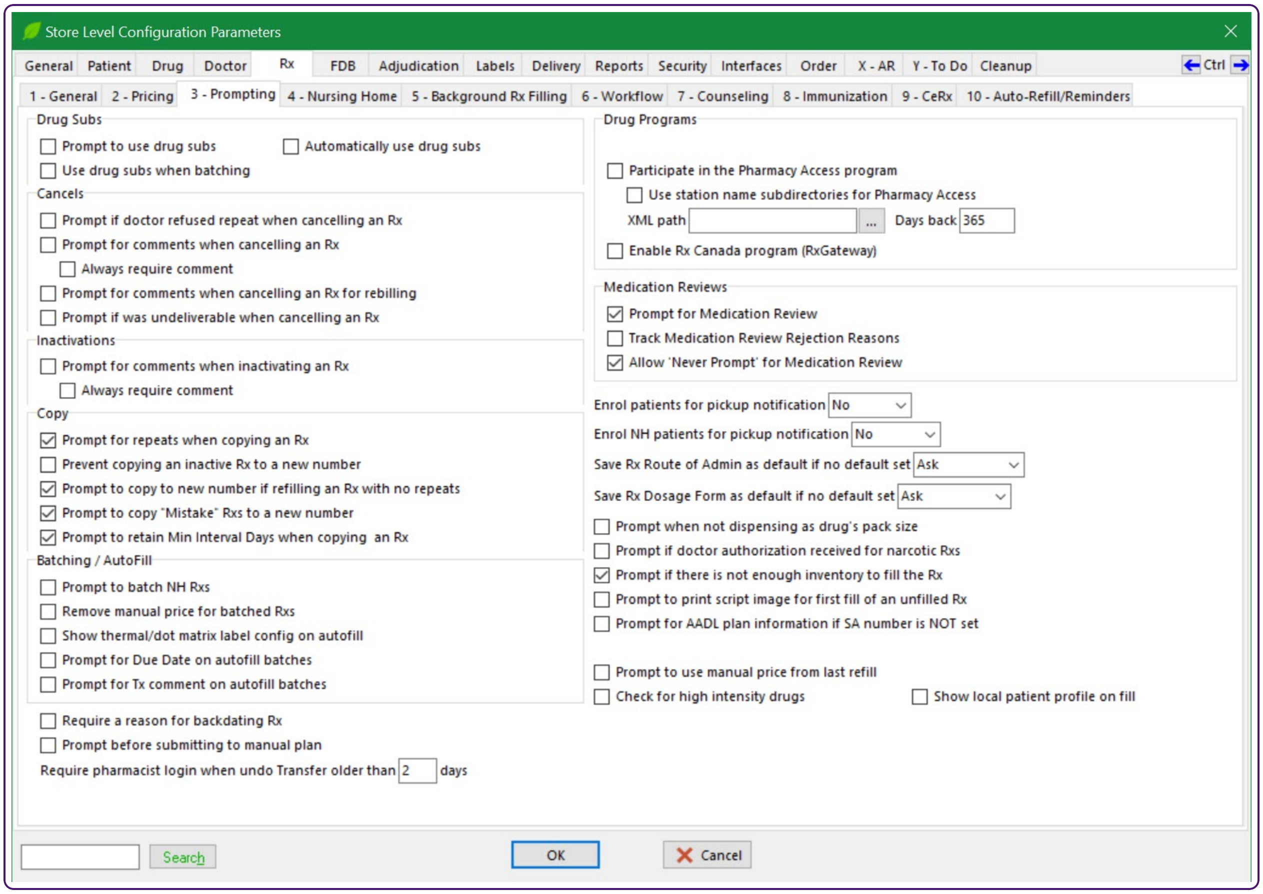


The following table describes the configuration settings on the **Rx** > **Pricing** tab.

Name	Description
Provincial (Formulary Drugs) and **Make this plan**	The plan that is used for formulary drugs when filling the Rx, and its priority in relation to the Clinical Provincial plan.
Clinical Provincial and **Make this plan**	The clinical provincial plan that is used and its priority in relation to the provincial plan. The clinical provincial plan only sends Rx data.
Narcotic Monitoring	The narcotic monitoring plan.
If patient has provincial plan but Rx is cash, use provincial plan pricing	If selected, the provincial pricing strategy is used instead of the cash strategy when dealing with patients that have a provincial plan but are paying for a cash Rx.
If Purch + X% is greater than Cost+Markup then charge Purchase+ X%	If the checkbox is selected and a value is entered in the field, the amount charged is adjusted as described.
Ignore for provincial plan	If selected, the markup is ignored for provincial plans.
Apply the difference to the	Whether to apply the difference to the cost, markup, or fee.

Name	Description
Prevent fill if section	The pricing conditions under which a prescription will not be filled (**Rx has a negative gross profit** and **Drug price field is blank**).
Warn if there are lower priced formulary items	If selected, users are warned if a cheaper interchangeable product is available.
Only for provincial plan	If selected, the search for lower priced formulary items is only run in the provincial plan.
Warn if Gross Profit is less than X%	If selected, you are warned if the overall gross profit of the prescription is less than the selected amount.
Warn if drug pack cost is older than X days	If a value is entered, a warning is displayed on the Rx warnings tab if the drug cost has not been updated since the specified number of days.
Allow copay adjustment after adjudication	If selected, you can alter the amount charged to the patient by opening the Rx in modify mode, right clicking on the copay/price amount beside the cash total, and adjusting the copay amount. The original copay amount returned by the plans cannot be exceeded.
Always use formulary cost level if applicable	If selected, the formulary cost is always used, even if the patient or doctor is selected from the Rx card.
Don't use formulary pricing if product selection is "Patient's Choice" or "Physician's Choice."	If selected, the formulary pricing strategy is overridden if the patient or doctor is selected on the Rx card.
Use Aggressive ODB Frequency Of Dispensing Fee Adjudication	If selected: ▪ The fee is not prediscounted ▪ If the patient is eligible for UN intervention code, and the drug is subject to UN intervention code, the UN intervention code is always sent. ▪ If the claim is rejected with a 65 intervention code erro), the system automatically removes the UN intervention code and retries the claim.

Prompting



The following table describes the configuration settings on the **Rx** > **Prompting** tab.

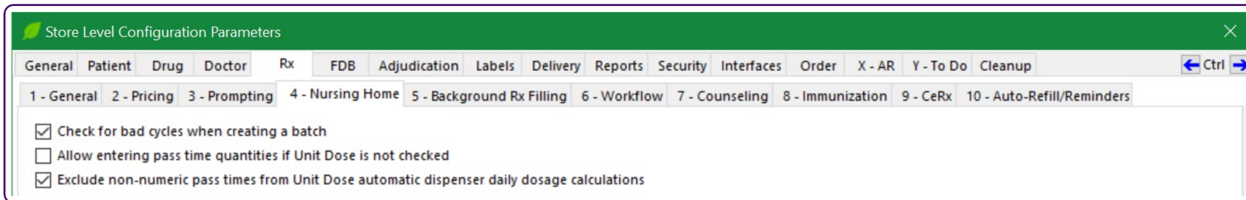
Name	Description
Prompt to use drug subs	If selected, and a drug sub is available, a prompt is displayed on the F12 fill window asking if you want to use the drug sub.
Automatically use drug Subs	If selected, the drug sub that is entered on the F5 drug window is automatically used.
Use drug subs when batching	If selected, the drug sub that is entered on the F5 drug window is automatically used with prescriptions included in a batch.
Prompt if doctor refused repeat When Cancelling Rx	If selected, a prompt is displayed on the F12 fill window when cancelling an Rx, asking you if doctor refused the repeat. If yes, the system removes any authorized quantity remaining on the prescription.
Prompt for comments when cancelling an RX	If selected, a prompt is displayed on the F12 fill window when cancelling an Rx, asking you to enter the reason the Rx is being cancelled. If **Always require comment** is selected, the comment is required.
Prompt for comments when inactivating an Rx	If selected, a prompt is displayed on the F12 fill window when inactivating an Rx, asking you to enter the reason the Rx is being inactivated. If **Always require comment** is selected, the comment is required.

Name	Description
Prompt for repeats when copying an Rx	If selected, when copying an Rx, a prompt asks for the number of repeats for a new Rx.
Prevent copying an inactive Rx to a new number	If selected, inactive Rxs cannot be copied.
Prompt to copy to new number if refilling an Rx with no repeats	If selected, a prompt is displayed when an Rx with no remaining quantity is displayed.
Prompt to copy “Mistake” Rxs to a new number	If selected, you are asked if you want to copy mistake Rxs to a new number.
Prompt to retain Min Interval Days when copying an Rx	If selected, you are asked whether you want to copy the **Min Interval Days** of an original Rx to its copy.
Prompt to batch NH home Rxs	If selected, you are asked to enter the nursing home patient’s prescriptions in a batch.
Remove manual price for batched Rxs	If selected, the manual price is removed from batch-filled prescriptions.
Show thermal/dot matrix label config on autofill	If selected, the configuration options for autofilled Rxs are displayed.
Prompt for Due Date on autofill batches	If selected, a prompt is displayed for each Rx in an autofill batch, requesting the due date.
Prompt for Tx comment on autofill batches	If selected, you are prompted to enter a Transaction Comment for autofill batches.
Require a reason for backdating Rx	If selected, the user must enter a reason when backdating an Rx.
Prompt before submitting to manual plan	If selected, a prompt is displayed when a user submits a claim to a manual plan, asking them to confirm this action.
Require pharmacist login when undo Transfer older than X days	If selected, the pharmacist must log in to undo a transfer out that is older than the specified number of days.
Participate in the Pharmacy Access program, **Use station name subdirectories for Pharmacy Access**, **XML path**, and **Days back**	Configure these fields if your store is using a drug information interface such as Access Point.

Name	Description
Enable Rx Canada program (RxGateway)	If selected, when an Rx is filled, an xml file is created in the KrollWin directory, in the RxGateway subdirectory.
Prompt for Medication Review	If selected, the user is asked whether they want to complete a medication review.
Track Medication Review Rejection Reasons	If selected, Kroll tracks the reasons users reject medication reviews.
Enrol Patients for Pickup Notification	Whether patients are automatically enrolled in the pickup notification service. If Ask is selected, you are prompted to ask the patient if they would like to enroll in the pickup notification service.
Enrol NH Patients for Pickup Notification	Whether nursing home patients are automatically enrolled in the pickup notification service. If Ask is selected, the system asks the user whether they would like to use the route code from the Rx.
Save Route code from Rx as default value if no default value is set	Whether the route code from the Rx is always used, if there is no default. If Ask is selected, the system asks the user whether they would like to use the route code from the Rx.
Save Rx Dosage Form as default if no default set	Whether the form code from the Rx is used if there is no default. If Ask is selected, you are asked if you want to use the form code from the Rx.
Prompt when not dispensing as drug's pack size	If selected, and you are filling a prescription for a drug that is dispensed as a pack and the Rx quantity is not a multiple of the drug pack size, a message to that effect is displayed. You can continue filling for this Rx quantity or multiply the Rx quantity by the pack size. If the you choose to continue filling the Rx quantity, you are asked whether you want to split the quantity between different pack sizes, switch to a different pack size, or ignore.
Prompt if Doctor Authorization Received for Narcotic Rxs	If selected, you are asked whether you received doctor authorizations for narcotic Rxs.
Prompt if there is not enough inventory to fill the Rx	If selected, you are warned when there is not enough inventory on hand to fill the Rx. You can choose to owe the patient, split the quantity between different pack sizes, switch to a different pack size, or ignore.
Prompt to print script image for 1st fill of an unfilled Rx	If selected, you are asked whether you want to print the script image the first time an unfilled Rx is filled.
Prompt for AADL plan information if SA number is NOT set	If selected and the Rx lacks a special authorization number, you are prompted for the AADL plan information. This only applies to certain drugs in certain jurisdictions.
Prompt to use manual price from last refill	If selected and the price for the previous fill was manually entered, you are prompted to select either the new or old price.

Name	Description
Check for high intensity drugs	If selected, a check is performed for high intensity drugs.
Show local patient profile on fill	If selected, the patient's local profile is displayed when F12 is selected on the Rx window.

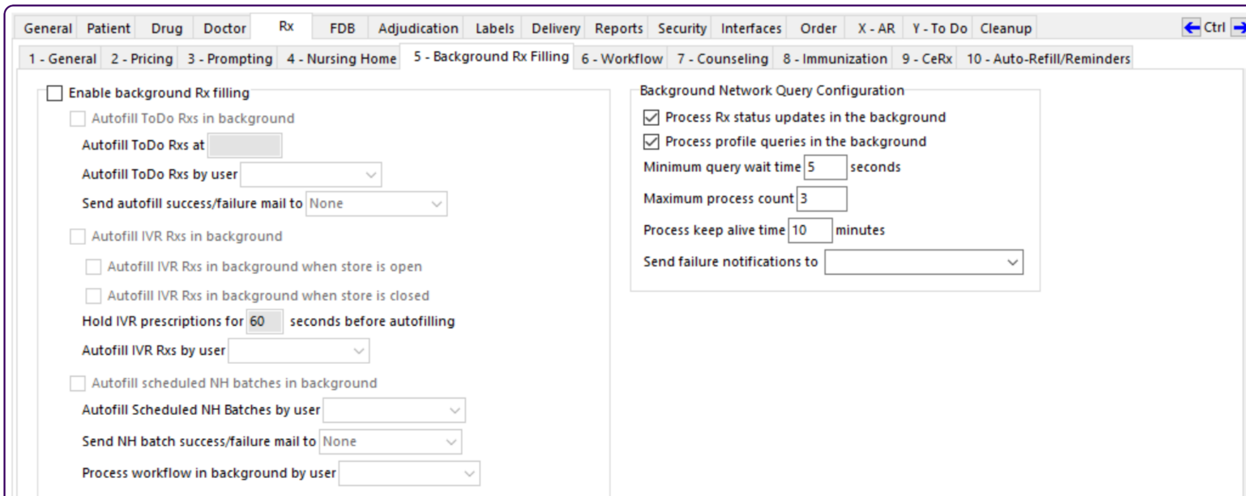
Nursing Home



The following table describes the configuration settings on the **Rx** > **Nursing Home** tab.

Name	Description
Check for bad cycles when creating a batch	If selected, newly created batches are scanned for bad cycles.
Allow entering pass time quantities if Unit Dose is not checked	If selected, you can add passtimes to the ATN box on the F12 window unless the Unit Dose feature is not being used.
Exclude non-numeric passtimes from Unit Dose automatic dispenser daily dosage calculations	If selected, non-numeric passtimes are excluded from the Unit Dose automatic dispenser daily dosage calculations.

Background Rx Filling

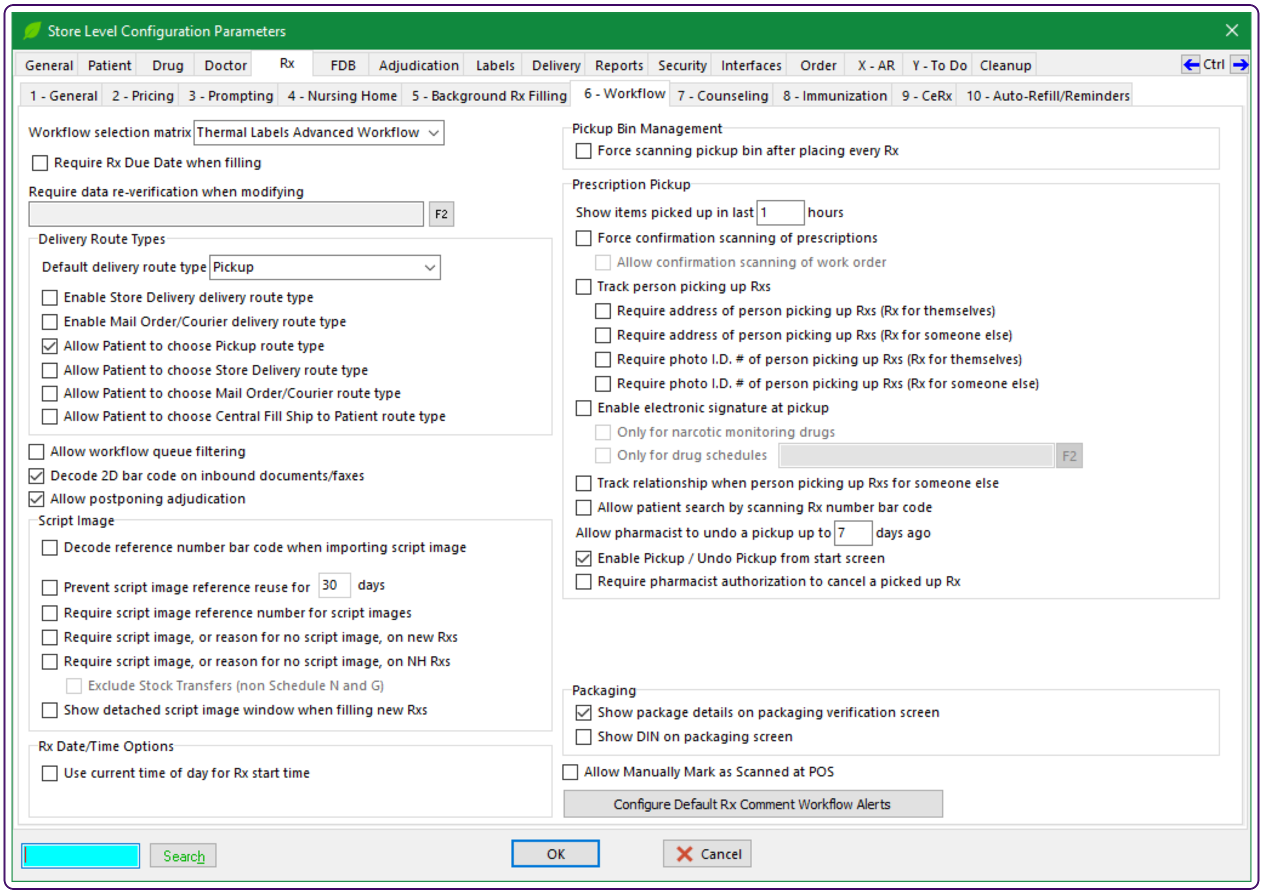


The following table describes the configuration settings on the **Rx** > **Background Rx Filling** tab.

Name	Description
Enable background Rx filling	If selected, the background Rx filling feature is enabled.
Autofill ToDo Rx in background	If selected, the background Rx service can fill all ToDo prescriptions.
Autofill ToDo Rxs at	If selected, you can to schedule a time when the background Rx service will begin filling ToDo items.
Autofill ToDo Rxs by User	If selected, you can select the user that the service will autofill the items.
Send autofill success/failure mail to	The mail group to which the autofill success/failure mail messages are sent.
Autofill IVR Rxs in background	If selected, the background Rx service is used to fill all prescriptions received by the IVR.
Autofill IVR Rxs in Background When Store is Open	If selected, the background service only fills IVR prescriptions when the store is open.
Autofill IVR Rxs in Background When Store is Closed	If selected, the background service only fills IVR prescriptions when the store is closed.
Hold IVR prescriptions for X seconds before autofilling	The amount of time the background Rx service waits before filling prescriptions that came from the IVR.
Autofill IVR Rxs by user	The name of the user the background Rx service uses to fill IVR prescriptions.
Autofill scheduled NH Batches in background	If selected, the background Rx service completes NH batches.
Autofill Scheduled NH Batches by User	The name of the user the background Rx service uses to fill NH prescriptions.
Send NH batch success/failure mail to	The mail group to which the pharmacy sends NH batch success and failure messages are sent.
Process workflow in background by user	The name of the user who will process the workflow in the background.

Name	Description
Process Rx status updates in the background	If selected, a status update query is sent to Alberta Netcare S2S when a patient profile is viewed.
Process profile queries in the background	If selected, a patient profile query is sent to Alberta Netcare when: ▪ When viewing a local patient profile. ▪ As soon as the patient Rx is filled in from the Rx filling window. ▪ A user searches for a patient, then selects F12 from the patient profile to fill a new Rx. ▪ An Rx is being refilled from the Start window. The patient profile query is sent in the background.
Minimum query wait time	How long you must wait for a profile query to complete (when applicable) before being allowed to cancel the request and proceed without viewing the network profile.
Maximum process count	The number of background sessions. The more sessions you use, the more requests you may be able to process at the same time, but you may consume more CPU time and memory.
Process keep alive time	How long a background session stays running without receiving a command before it is terminated. A larger value means new sessions are not opened as often, which can make requests faster, but also means that more memory is consumed during idle time.
Send failure notifications to	The mail group that will receive notifications.

Workflow



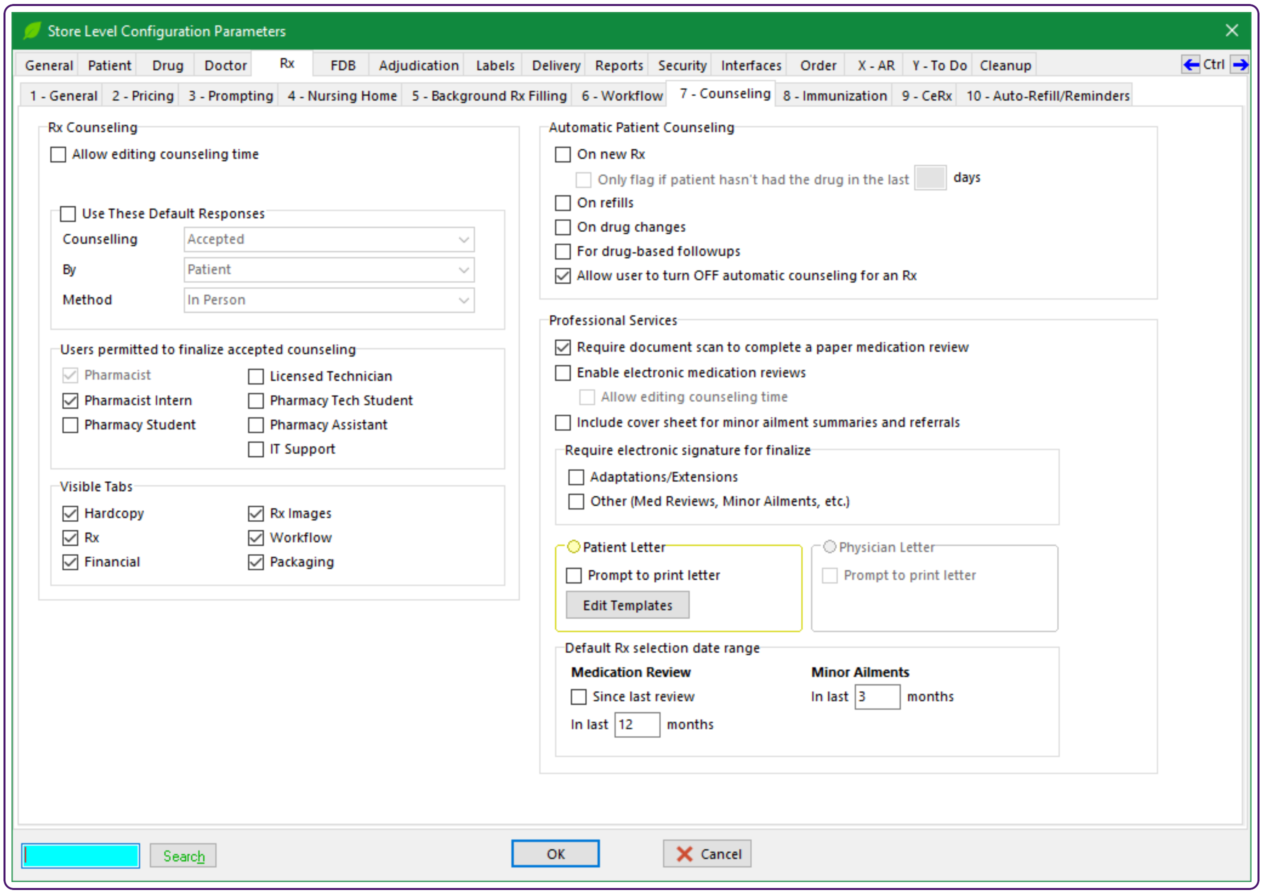
The following table describes the configuration settings on the **Rx** > **Workflow** tab.

Name	Description
Workflow selection matrix	The preconfigured Workflow matrix.
Require Rx Due Date when filling	If selected, a due date is required when filling a prescription.
Require data re-verification when modifying	If selected, you must review data for any of the items selected on the list.
Default delivery route type	The default delivery route type.
Enable Store Delivery delivery route type and **Enable Mail Order/Courier delivery route type**	If selected, these route types can be selected from the Rx window.
Allow Patient to choose Pickup route type, **Allow Patient to choose Store Delivery route type**, **Allow Patient to choose Mail Order/Courier route type**, **Allow Patient to choose Central Fill Ship to Patient route type**	Patients can choose any of these routes that are selected.

Name	Description
Allow workflow queue filtering	If selected, you can filter Rxs by current workflow stage from the Workflow window.
Decode 2D bar code on inbound documents/faxes and **Decode reference number bar code when importing script image**	If selected, the 2D bar code on inbound documents/faxes and the reference number bar code on script images are decoded. This option is useful if you want to automate the reconciliation of your inbound documents and your network scanner does not support TWAIN.
Allow postponing adjudication	If selected, when data transmission fails, adjudication is postponed so it can be resent later.
Prevent script image reference reuse for [x] days	The number of days that must elapse before a barcode image can be rescanned.
Require script image reference for script images	If selected, script images must have a script image reference.
Require script image, or reason for no script image, on New Rxs and **Require script image, or reason for no script image, on NH Rxs**	If selected, new and NH Rxs, respectively, must have script images or reasons why script images are excluded.
Exclude Stock Transfers (no Schedule N and G)	If selected, script images are not required for stock transfers.
Show detached script window when filling new Rxs	If selected, the Rx window is superimposed when you are filling a new Rx.
Use current time of day for Rx start time	If selected, the current time is used as the Rx start time.
Force scanning pickup bin after placing every Rx	If selected, you must scan a pickup bin when filling an Rx so it becomes associated with that bin.
Show items picked up in last [x] hours	The number of hours picked up items remain in the picked up window.
Force confirmation scanning of prescriptions	If selected, you must scan the Rx barcode on pick up.
Allow confirmation scanning of work order	If selected, work orders can be scanned.
Track person picking up Rxs	If selected, you must ask the person picking up the Rx how they are related to the patient.
Require address of person picking up Rxs (Rx for themselves), Require address of person picking up Rxs (Rx for someone else)	If selected, you must obtain the address of the person picking up the Rx for themselves, or for someone else, respectively.
Require photo I.D. # of person picking up Rxs (Rx for themselves), Require photo I.D . # of person picking up Rxs (Rx for someone else),	If selected, the patient or the person picking up the prescription must provide a photo ID number.
Enable electronic signature at pickup	If selected, patients can use electronic signature to sign for their prescription deliveries.

Name	Description
Only for narcotic monitoring drugs	If selected, electronic signature is enabled only for narcotic monitoring drugs.
Only for drug schedules	If selected, electronic signature is enabled only for the selected drug schedules.
Track relationship when person picking up Rxs for someone else	If selected, if someone other than the patient picks up a prescription, you must specify their relationship to the patient.
Allow patient search by scanning Rx number bar code	If selected, you can perform a patient search by scanning an Rx barcode.
Allow pharmacist to undo a pickup up to [x] days ago	The maximum number of days after a prescription was picked up that a pharmacist can undo the pickup.
Enable Pickup / Undo Pickup from start screen	If selected, the F10 pickup button on the start window and the undo pickup option under the Utilities menu are enabled.
Require pharmacist authorization to cancel a picked up Rx	If selected, Rxs that have been picked up require pharmacist authorization to be cancelled.
Show package details on packaging verification screen	If selected, the lot and expiry date information entered on the packaging screen is available on the verify packaging screen.
Show DIN on packaging screen	If selected, the DIN is shown on the Packaging workflow window.
Allow Manually Mark as Scanned at POS	If selected, you can manually set the **Scanned At POS Date** if the Rx was picked up.
Configure Default Rx Comment Workflow Alerts	Select this button to select the default Rx comment workflow alerts.

Counselling

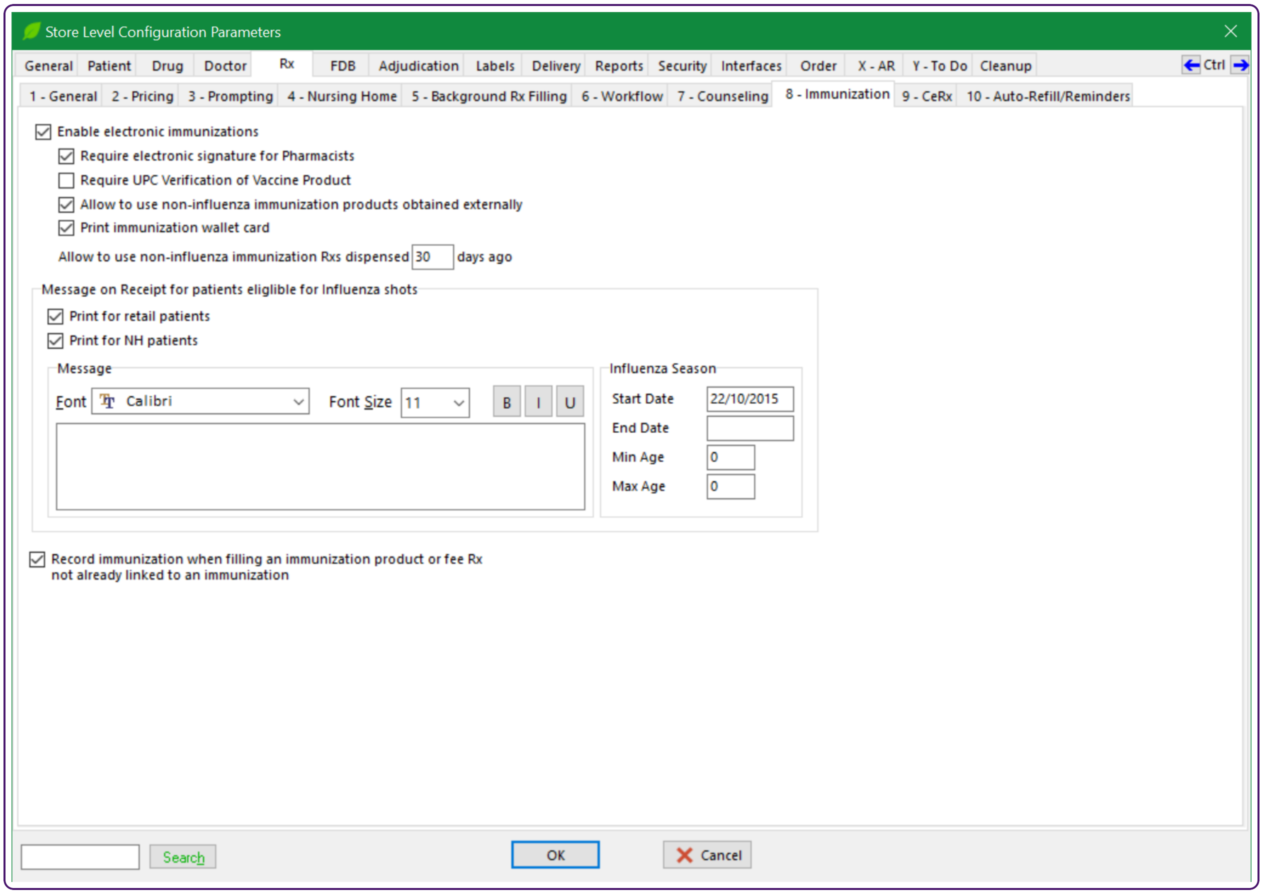


The following table describes the configuration settings on the **Rx** > **Counselling** tab.

Name	Description
Allow editing counseling time	If selected, you can edit counseling times when filling an Rx, prior to saving the record.
Use These Default Responses, **Counselling**, **By**, and **Method**	If the check box is selected, the values set in the **Counselling**, **By**, and **Method** fields are used as the default responses for the Rx counselling.
Users permitted to finalize accepted counseling section	The selected types of users can finalize accepted counseling.
Visible Tabs section	The selected tabs are visible during Rx verification. By default, all tabs are enabled.
On new Rx, **On refills**, **On drug changes**, **For drug-based followups**	The counseling window is displayed for the selected types of Rxs.
Only flag if patient hasn't had the drug in the last [x] days	Patients that have exceeded the set days since they last had the prescribed drug are automatically selected for counseling.

Name	Description
Allow user to turn OFF automatic counseling for an Rx	If selected, the pharmacist can opt a patient out of automatic counseling.
Require document scan to complete paper medication review	If selected, you must scan the Med Review document to confirm that you have completed the Med Review step.
Enable electronic medication reviews	If selected, electronic (paperless) medication reviews are enabled.
Include cover sheet for minor ailment summaries and referrals	If selected, a cover page is included when a minor ailment summary or referral is sent to a doctor.
Require electronic signature section	The selected types of Rxs require electronic signature during the Rx verification steps.
Prompt to print letter	If selected, the user is asked whether they want to print the physician letter.
Edit templates	Select this button to edit, add, or delete a patient letter.
Since last review	If selected, the default date range for the medication review starts at the date of the last review and continues to the current date. **Since last review** and **In the last [x] months** are mutually exclusive.
In the last [x] months	The number of months back in time to begin the default date range for either minor ailments or medication reviews (depending on which of the **In the last [x] months** fields is selected).

Immunization



The following table describes the configuration settings on the **Rx** > **Immunization** tab.

Name	Description
Enable electronic immunizations	If selected, immunization documentation is completed electronically rather than manually, using paper.
Require electronic signature for Pharmacists	If selected, the pharmacist must record an electronic signature using a digital signature tablet. The electronic signature functionality must be set up to use this functionality.
Require UPC Verification of Vaccine Product	If selected, the user must scan or enter the UPC number associated with the administered vaccine.
Allow to use non-influenza immunization products obtained externally	If selected, the pharmacist can accept non-influenza immunization products for injection in the following two scenarios: - The patient brings in a product that was dispensed from another pharmacy. - The patient is required to take more than one injection of a product on separate days, and is returning to the same pharmacy with the second or third vaccine of the same product.

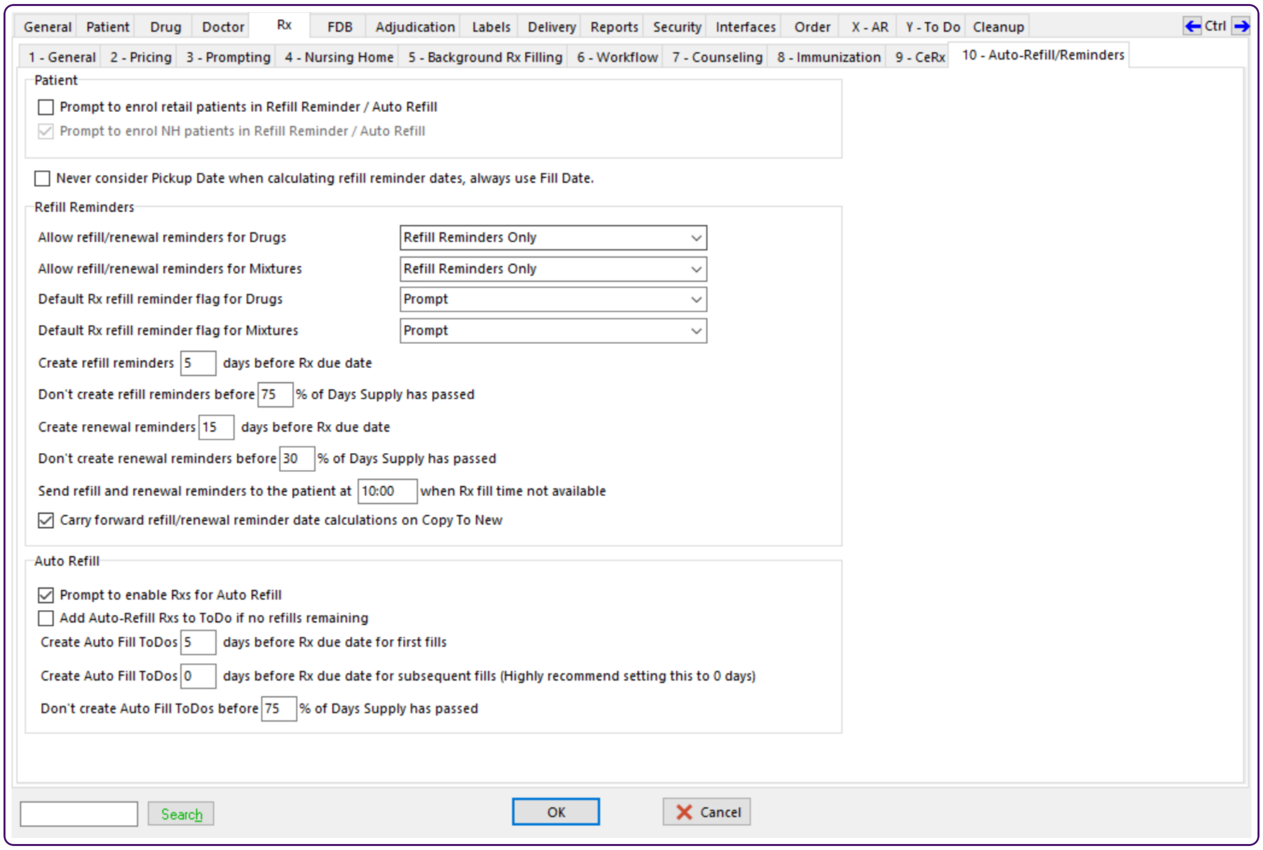
Name	Description
Print immunization wallet card	If selected, the patient's immunization wallet card is printed.
Allow to use non-influenza immunization Rxs dispensed [x] days ago	The number of days in the past that a Rx can be dispensed and treated as a recently dispensed Rx.
Message on Receipt for patients eligible for Influenza shots	The Influenza marketing message that is printed at the bottom of receipts for retail and nursing home patients.
Record immunization when filling an immunization product or fee Rx not already linked to an immunization	If selected, when a user is filling an Rx for an immunization or fee Rx that is not linked to an immunization, the user is prompted to enter the immunization information in the Immunizations data entry window.

CeRx

The following table describes the configuration settings on the **Rx** > **CeRx** tab.

Name	Description
Copy Sig Code when creating local Rxs from network Orders	If selected, the Sig from the network order is used when a local Rx is created.
Prompt to remind me [x], **Automatically turn prompting off when [x]% of weekly Rxs are eRx**, and **Automatically prompt on non-eRx when [x]% of weekly Rxs are eRx**	These three fields define the conditions under which local authorization reminders are displayed.

Auto-Refill/Reminders



The following table describes the configuration settings on the **Rx** > **Auto-Refill/Reminders** tab.

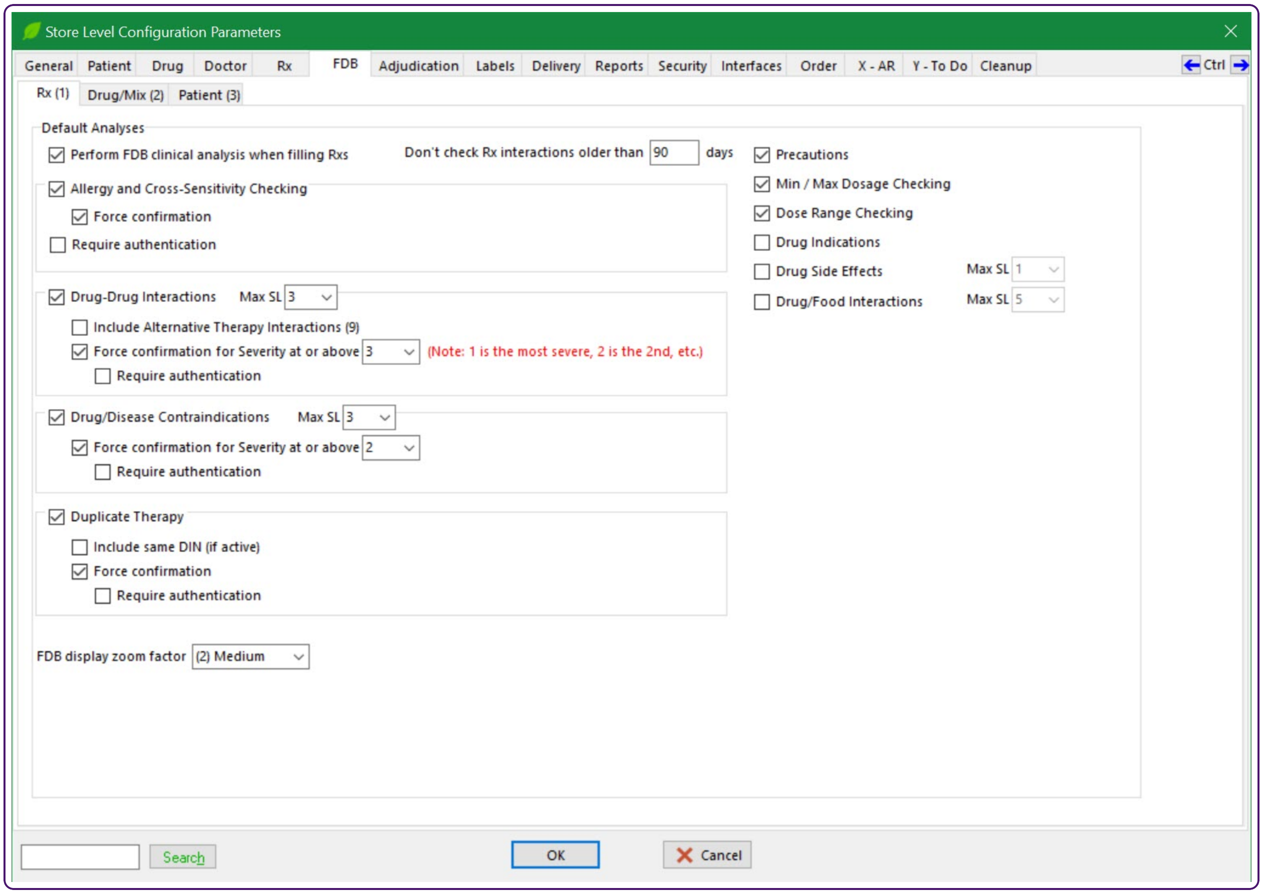
Name	Description
Prompt to enrol retail patients in Refill Reminder / Auto Refill	If selected, the user is asked whether they want to enroll a retail patient in refill reminder/autorefill when the patient's profile is loaded.
Prompt to enrol NH patients in Refill Reminder / Auto Refill	If selected, the user is asked whether they want to enroll a nursing home patient in refill reminder/autorefill when the patient's profile is loaded.
Never consider Pickup Date when calculating refill reminder dates, always use Fill Date	If selected, the fill date is used when calculating reminder dates.
Allow refill/renewal reminders for Drugs	The default reminders for drug cards for which specific reminders are not set.
Allow refill/renewal reminders for Mixtures	The default reminders for mixture cards for which specific reminders are not set.
Default Rx refill reminder flag for Drugs	Whether the Reminder checkbox is enabled on the Fill window, for drugs with refill reminders. If set to Prompt, the user is asked whether they want to enable refill reminders for this prescription.

Name	Description
Default Rx refill reminder flags for Mixtures	Whether the Reminder checkbox is enabled on the Fill window, for mixtures with refill reminders. If set to Prompt, the user is asked whether they want to enable refill reminders for this prescription.
Create refill reminders [x] days before Rx due date	The number of days before the Rx due date that refill reminders are sent to the patient.
Don't create refill reminders [x]% of Days Supply has passed	The percentage of the days supply that should be used up before refill reminders are sent to the patient.
Create renewal reminders [x] days before Rx due date	The number of days before the Rx due date that renewal reminders are sent to the patient.
Don't create renewal reminders [x]% of Days Supply has passed	The percentage of the days supply that should be used up before renewal reminders are sent to the patient.
Send refill and renewals reminders to the patient at [x] when Rx fill time not available	The time of day refill and renewal reminders are sent to the patient. Keep in mind that you will receive a number of requests after this time.
Carry forward refill/renewal reminder date calculations on Copy to New	If selected, the refill/renewal reminder date calculations are copied when an Rx is copied. For example, if a refill is due in 20 days, and the prescription is copied, should the new prescription be due in 20 days?
Prompt to enable Rxs for Auto Refill	If selected, the user is prompted to enable the Rxs for automatic refill.
Add Auto-Refill Rxs to ToDo if no refills remaining	If selected, auto-refill Rxs are moved to the ToDo queue if they do not have any refills remaining.
Create Auto Fill ToDos [x] days before Rx due date for first fills	The number of days before the Rx due date that the first autofill of an Rx is added to the ToDo queue.
Create Auto Fill ToDos [x] days before Rx due date for subsequent fills	The number of days before the Rx due date that subsequent autofills of an Rx are added to the ToDo queue.
Don't create Auto Fill ToDos before [x]% of Days Supply has passed	The percentage of the days supply that should be used up before autofill ToDos are created.

FDB

First Data Bank (FDB) provides Kroll with a database that has allergy and interaction checking, drug information leaflets and much more.

Rx tab



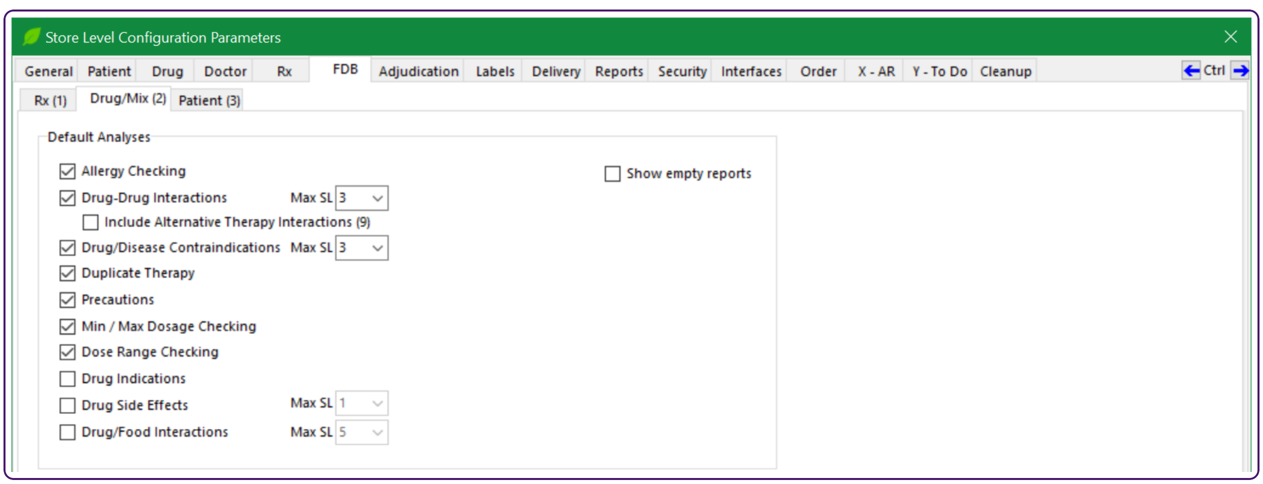
The following table describes the configuration settings on the **FDB** tab.

Name	Description
Perform FDB clinical analysis when filling Rxs	Select to perform FDB clinical analysis when filling Rxs.
Don't check Rx interactions older than [x] days	The maximum number of days that can pass before Rxs are no longer checked.
Allergy and Cross-Sensitivity Checking	If selected, patient allergies and drug sensitivities are checked when filling an Rx.
Force confirmation fields	If selected, users must confirm the applicable action.
Require authentication	If selected, users must authenticate their identities when performing the applicable analyses.
Drug-Drug Interactions	If selected, the system checks for interactions between drugs.
Max SL	The maximum security level. Level 3 is high and level 1 is low.

Name	Description
Include Alternative Therapy Interactions	If selected, the FDB (First Databank) Therapeutic Advisor is used to detect potential drug-drug interactions with alternative therapy products.
Force confirmation for Severity at or above [x]	A number representing the minimum severity level of the applicable type of analysis that must be confirmed.
Drug/Disease Contraindications	If selected, the system checks to ensure the prescribed drug will not adversely affect the patient's existing medical conditions.
Duplicate Therapy	If selected, a warning is displayed if the patient is taking more than one of the same type of drug for the same therapy.
Include same DIN (if active)	If selected, filling different strengths of the same drug prompts a duplication of therapy warning.
Force confirmation	If selected, you must enter your login credentials before completing an Rx.
FDB display zoom factor	The factor by which the FDB information is magnified when it is displayed.
Precautions	If selected, the precautions are displayed.
Min / Max Dosage Checking	If selected, the minimum and maximum dosages are displayed.
Dose Range Checking	If selected, the dose range is displayed.
Drug Indications	If selected, the appropriateness of the drug therapy for a specific medical condition is assessed based on current medical evidence.
Drug Side Effects	If selected, drug side effects are displayed.
Drug/Food Interactions	If selected, monographs on potential drug-food interactions are displayed to assist clinicians in educating the consumer about potential interactions that may occur between certain drugs and foods.

Drug/Mix and Patient

The **Drug/Mix** and **Patient** sub-tabs contain the same fields.



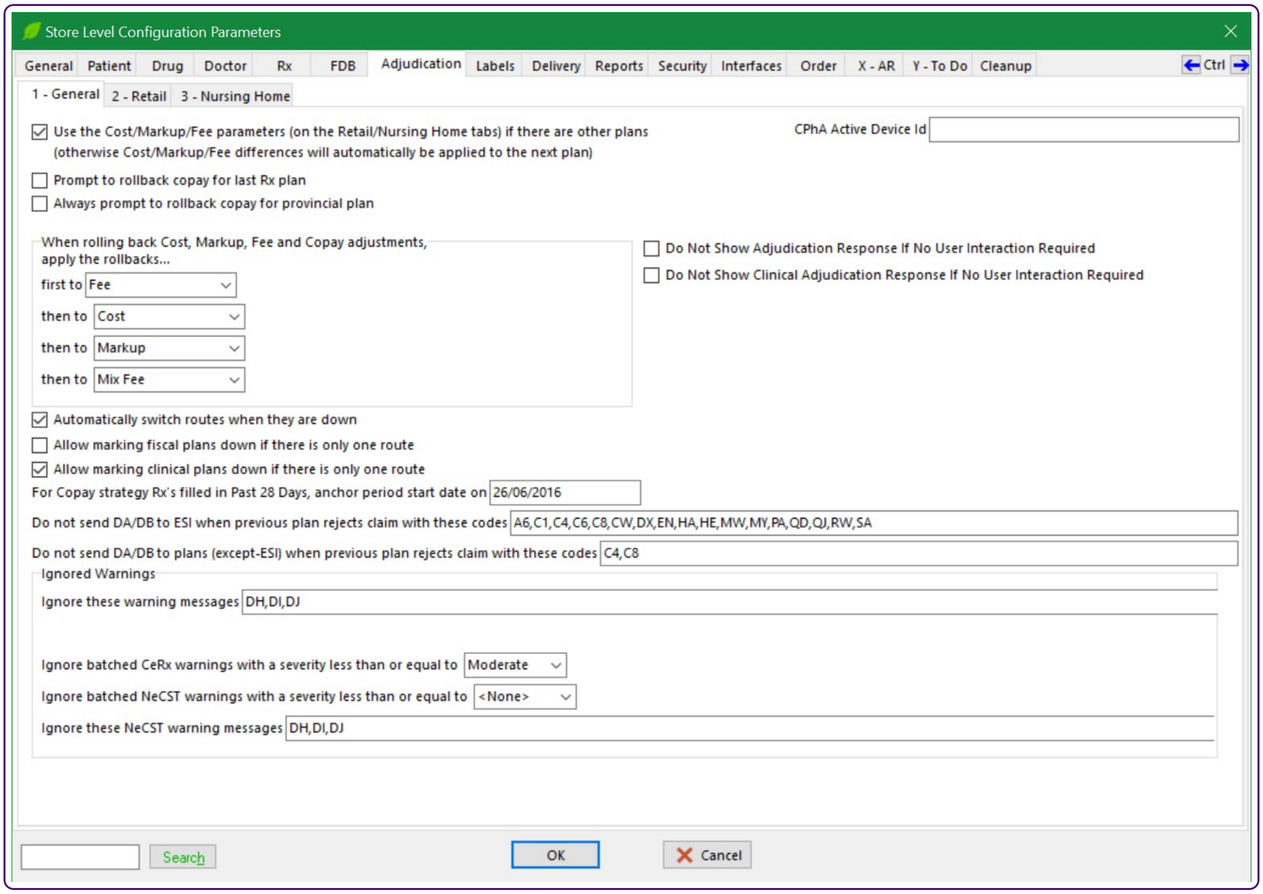
The following table describes the configuration settings on the **FDB** > **Drug/Mix** and **FDB** > **Patient** tabs.

Name	Description
Allergy Checking	If selected, allergy checking is performed on drugs and mixes.
Show empty reports	If selected, empty reports are displayed.
Drug-Drug Interactions, **Drug/Disease Contraindications**, **Duplicate Therapy, Precautions**, **Min / Max Dosage Checking**, **Dose Range Checking**, **Drug Indications**, **Drug Side Effects**, and **Drug/Food Interactions**	The types of allergy information that are displayed.
Max SL	The maximum security level. Level 3 is high and level 1 is low.

Adjudication

The following section describes the configuration settings available on the **Adjudication** tab.

General



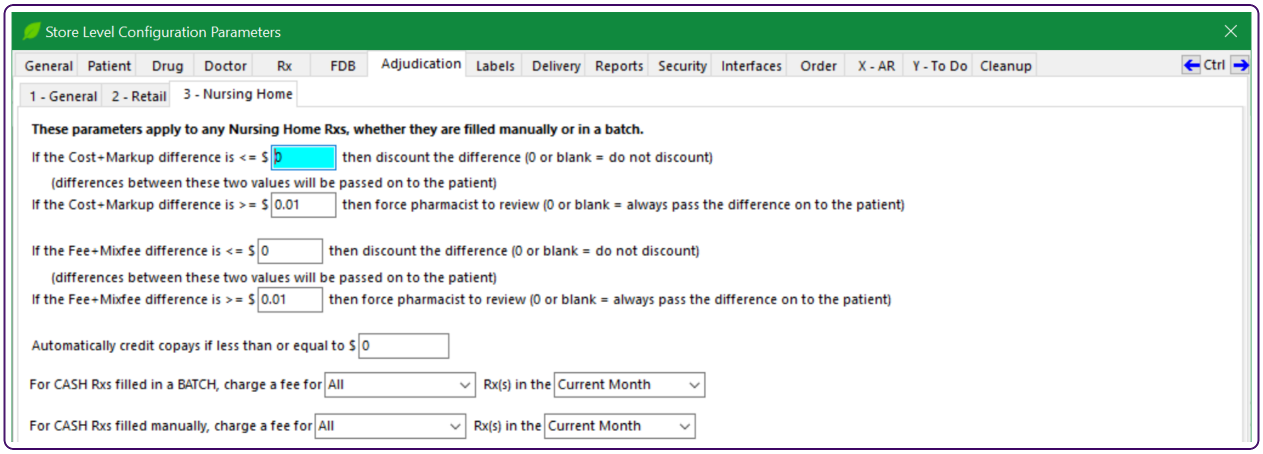
The following table describes the configuration settings on the **Adjudication** > **General** tab.

Name	Description
Use the Cost/Markup/Fee parameters (on the Retail/Nursing Home tabs) if there are other plans	If selected, the cost/markup/fee parameters set on the Retail and Nursing Home tabs are used if other drug plans are present.
Prompt to rollback copay for last Rx plan	If selected, the copay from the primary plan is automatically sent to the next plan, so you can adjust the final copay once the Rx has been sent through all plans.
Always prompt to rollback copay for provincial plan	If selected, a prompt is displayed, asking if users want to waive part or all of the copay amount before it is sent to the next plan.
When rolling back Cost, Markup Fee and Copay Adjustments, apply the rollbacks section	The sequence in which rollbacks are applied.
Automatically switch routes when they are down	If selected, automatically switches to the secondary route when the primary route is down.

Name	Description
Allow marking fiscal plans down if there is only one route, Allow marking clinical plans down if there is only one route	If selected, the financial plans and clinical plans, respectively, are marked down if only one route is available for adjudication.
For Copay strategy Rxs filled in Past 28 Days, anchor period start date on [x]	The anchor start date for Rxs filled in the last 28 days.
Do not sent DA/DB to ESI when previous plan rejects claim with these codes	If a previous claim rejects with one of these codes, the DA/DB is not sent to ESI (Express Scripts).
Do not sent DA/DB to plans (except ESI) when previous plan rejects claim with these codes	If a previous claim rejects with one of these codes, the DA/DB is not sent to any plans except ESI (Express Scripts).
Ignore these warning messages	The warning messages that will be ignored.
Ignore batched CeRx warnings with a severity less than or equal to, **Ignore batched NeCST warnings with a severity less than or equal to**	The level after which batched CeRx and NeCST warnings are displayed (e.g. if Moderate is selected, Low and High warnings are displayed). If no option is chosen, you must correct any severity level that is returned during batching.
Ignore these NeCST warning messages	The NeCST warning messages that will be ignored.

Retail/Nursing Home

The **Retail** and **Nursing Home** tabs contain the same settings. Users must configure both tabs, depending on the settings that apply to the pharmacy. Users can select different values for retail Rxs and nursing home Rxs; the selected parameters will apply regardless of whether Rxs are filled manually or in a batch.



The following table describes the configuration settings on the **Adjudication** > **Retail** and **Nursing Home** tabs. The last two fields are only available on the **Nursing Home** tab.

Name	Description
If the Cost + Markup difference is < = $ [x] then discount the difference	Differences greater than or equal to the amount specified are passed onto the patient. This value must match the **If the Fee + MixFee difference is < = $ [x] then discount the difference** value. 0 or blank means Do Not Discount.
If the Cost + Markup difference is > = $[x] then force pharmacist to review	Differences greater than or equal to the amount specified prompt the pharmacist to review the prescription. The default value is $0.01. 0 or blank means the difference is passed onto to the patient.
If the Fee + MixFee difference is < = $ [x] then discount the difference	Differences less than or equal to the amount specified are passed on to the patient. This value must match the **If the Cost + Markup difference is < = $ [x] then discount the difference** value. 0 or blank means Do Not Discount.
If the Fee+MixFee difference is > = $[x] then force pharmacist to review	This value must match the **If the Cost + Markup difference is > = $[x] then force pharmacist to review** value. 0 or blank means the difference is passed onto to the patient.

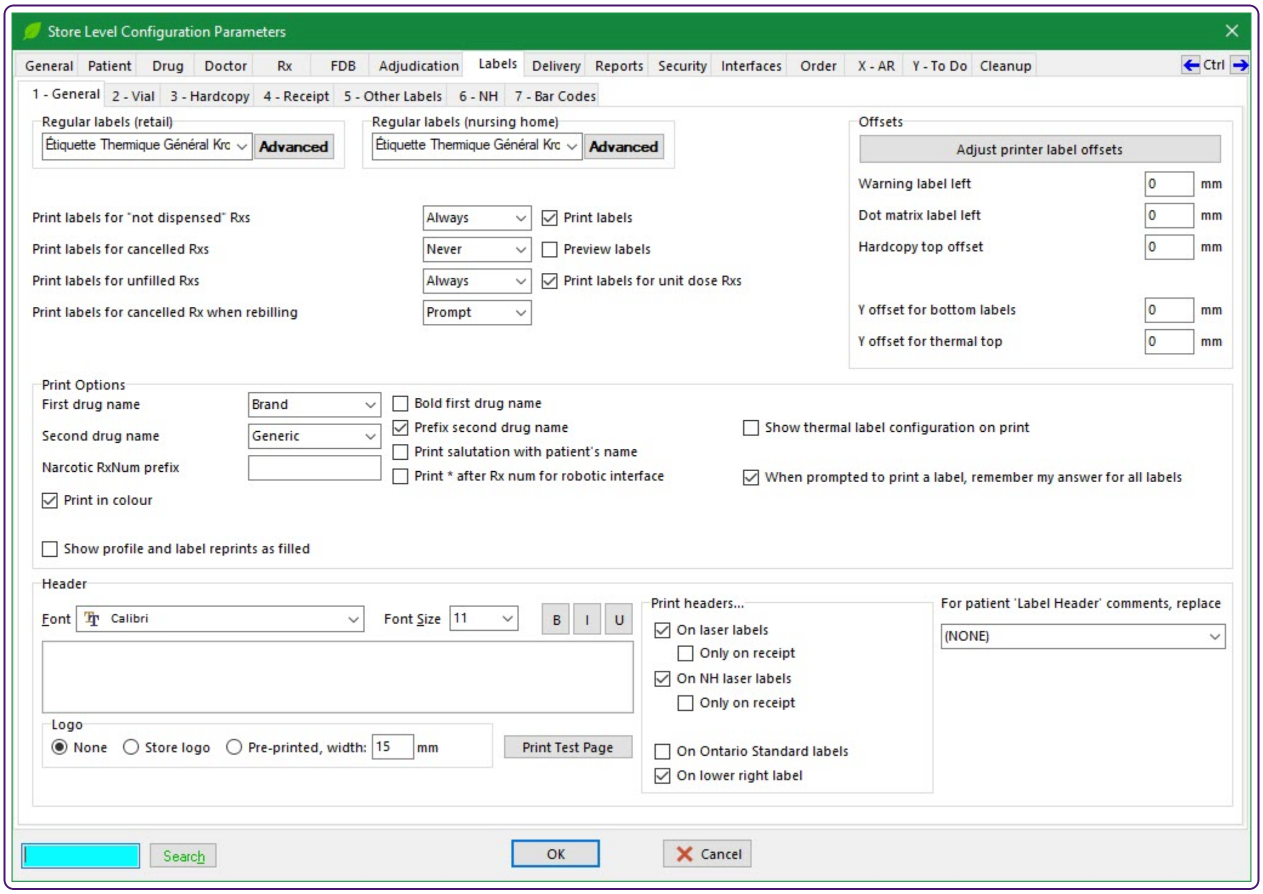
Name	Description
Automatically Credit Copays if less than or equal to $[x]	If selected, the credit copay value is set to zero if the amount returned is equal or less than the pre-set amount.
For CASH Rxs filled in a BATCH, charge a fee for [x] Rx(s) in the [y], For CASH Rxs filled manually, charge a fee for [x] Rx(s) in the [y]	The number of cash Rxs [x] to be charged during a specific date range [y], for cash Rxs filled in a batch or manually.

Labels

The following section describes the configuration settings available on the **Labels** tab.

General

You can use the **General** tab to configure the label settings for retail and nursing home Rxs. Select the **Advanced** button to define additional label mappings and create new stocks. This tab also contains controls for adjusting the printer offsets.

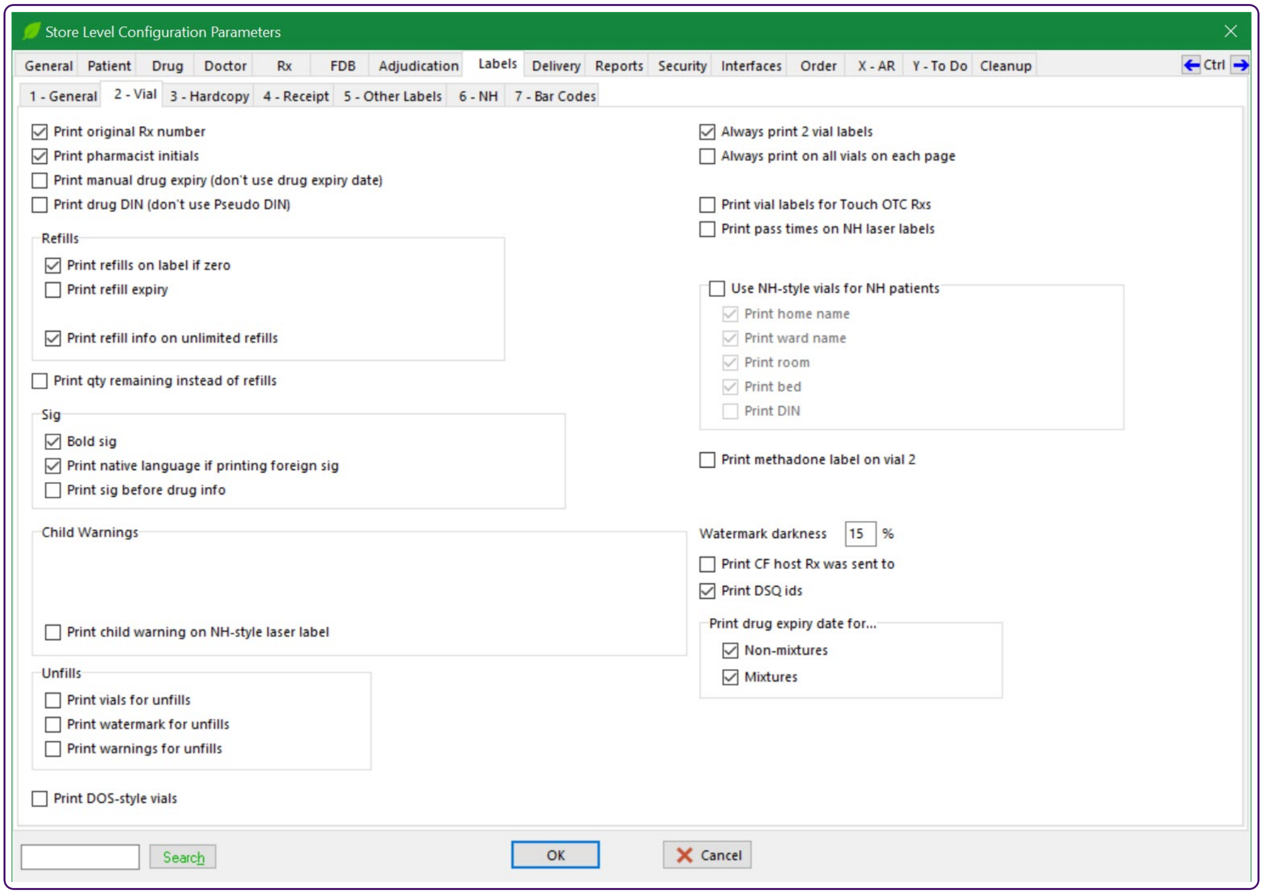


The following table describes the configuration settings on the **Labels** > **General** tab.

Name	Description
Regular Labels (retail/nursing home)	The label types that the settings on this page are applied to.
Advanced	Select to configure the settings for the selected label.
Print labels for “not dispensed” Rxs	Whether labels are printed for Rxs that have not been dispensed.
Print labels	If selected, labels will be printed for each Rx.
Print labels for cancelled Rxs	Whether labels are printed for cancelled Rxs.
Preview labels	If selected, label previews are displayed before the label is printed.
Print labels for unfilled Rxs	If selected, labels are printed for unfilled Rxs.
Print laser labels on unit dose Rxs	If selected, laser labels are printed when unit dose is selected in the Rx.
Print labels for cancelled Rx when rebilling	If selected, labels are printed for the cancelled Rx when rebilling.
Adjust printer label offsets	Select to adjust the left and top offsets of the printers.
Offset fields	The offsets for various labels.
First drug name, Second drug name	The information that prints as the drug's first and second name, respectively, on the vial label.
Narcotic RxNum prefix	The prefix added to the Rx number for narcotic drugs.
Bold first drug name	If selected, the first drug name is bolded on the vial label.
Prefix second drug name	If selected, the second drug name is prefixed to the first drug name.
Print salutation with patient's name	If selected, the salutation set on the **F3 - Patient** window is shown on the vial label.
Print * after Rx num for robotic interface	If selected, and an Rx is filled by a robotic interface, pill counter, etc., an asterisk is inserted after the Rx number to indicate the Rx is being filled by the machine.
Show profile and label reprints as filled	If selected, a status of ‘filled’, rather than ‘reprint’ is displayed on the hardcopy.
Show thermal label configuration on print	If selected, a label configuration window is displayed before labels are printed.
When prompted to print a label, remember my answer for all labels	If selected, when the user is asked whether they want to print a label, their answer is used for all of the labels.
Print in colour	If selected, labels are printed in colour.
Show profile and label reprints as filled	If selected, the profile and label reprints are shown as filled.
Header section	The pharmacy’s address information as it appears on laser labels.
Logo	
Print headers section	If a type of label is selected, the header is printed on it.
For patient 'Label Header' comments, replace [x]	The portion of the text entered on the **Configuration** > **Workstation** > **Labels** tab that will be used for the label header. For more information, see "Labels" (page 443).

Vial

The options on this tab vary depending on whether laser labels, dot matrix labels, or thermal printer labels are configured on the **General** tab. The options available for laser labels are described below.



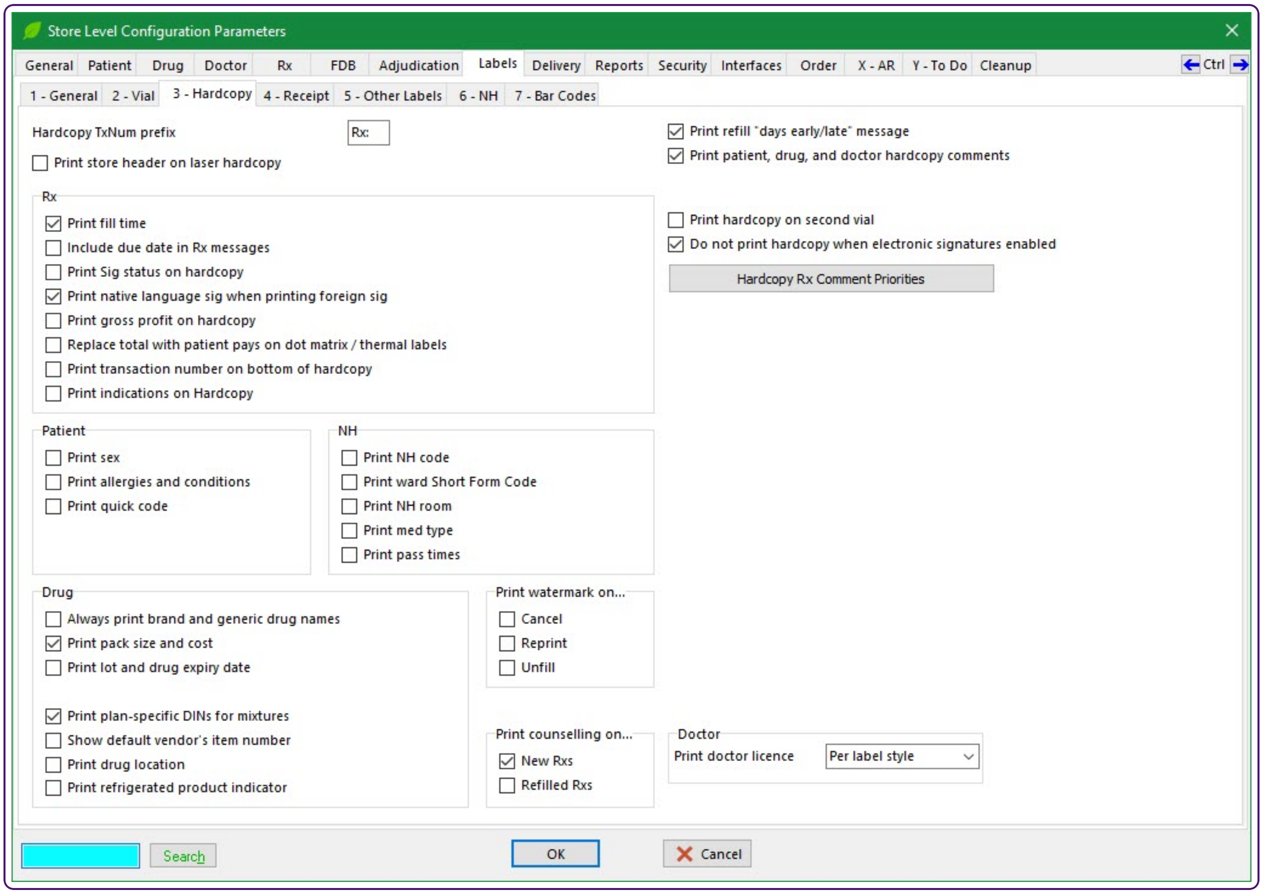
The following table describes the configuration settings on the **Labels** > **Vial** tab.

Name	Description
Print original Rx number	If selected, the system prints the original Rx number for each prescription filled in a chain.
Print pharmacist initials	If selected, the pharmacist's initials are printed on the vial label.
Print manual drug expiry (don't use drug expiry date)	If selected, a blank expiry label is printed on the bottom of the vial label so you can write in an expiry date.
Print drug DIN (don't use Pseudo DIN)	If selected, the DIN is printed on the vial label, instead of the pseudo DIN that was used for billing.
Always print 2 vial labels	If selected, vial labels are always printed in sets of two.
Always print on all vials on each page	If selected, vial labels are printed for each label set; none are blank.
Print vial labels for Touch OTC Rxs	If selected, vial labels are printed for touch pickup OTC Rxs.

Name	Description
Print pass times on NH laser labels	If selected, the passtime is printed on a regular label if the patient is in a nursing home.
Print refills on label if zero	If selected, refills are printed as zero if the patient does not have repeats left on the prescription.
Print refill expiry	If selected, the refill expiry date is printed.
Print refill info on unlimited refills	If selected, the refill information is printed on unlimited refill Rxs.
Print qty remaining instead of refills	If selected, the pill count is printed in the refill position instead of the number of refills left.
Use NH-style vials for NH patients section	If selected, nursing home-style vial labels are used for nursing home patients. The selected information is printed on these labels.
Print methadone label on vial 2	If selected, a methadone label is printed on the second vial label for methadone prescriptions so the signatures of the patient and the witness can be recorded.
Bold sig	If selected, the sig line on the vial label is bolded.
Print native language if printing foreign sig	If selected, the SIG is printed in the native language on the hardcopy.
Print sig before drug info	If selected, the SIG is printed before the drug information on the vial.
Print narrow vials (my labels have pre-printed child warnings)	This field applies to provinces in which child warnings are required to be printed. This provides a narrow label to make room for the pre-printed child warning.
Print child warning on NH-style laser label	If selected, a warning is printed on the left hand side of the vial label stating to keep out of reach of children.
Watermark darkness	The watermark opacity as a percentage.
Print CF host Rx was sent to	If selected, the name of the Central Fill host is printed at the bottom of the vial label.
Print DSQ ids	If selected, DSQ (Dossier Santé Québec) IDs are printed.
Print vials for unfills	If selected, vial labels are printed for unfilled prescription. If deselected, the system defaults to printing a hardcopy but no vial label.
Print watermark for unfills	If selected, a watermark is printed diagonally across the label, stating it is unfilled.
Print warnings for unfills	If selected, warnings are printed for unfilled Rxs.
Print DOS-style vials	If selected, you can print DOS-style vial labels.
Print drug expiry dates for... section	Indicates whether drug expiry dates are printed for non-mixtures and mixtures.

Hardcopy

The options on this tab vary depending on whether laser labels, dot matrix labels, or thermal printer labels are configured on the **General** tab. The options available for laser labels are described below.

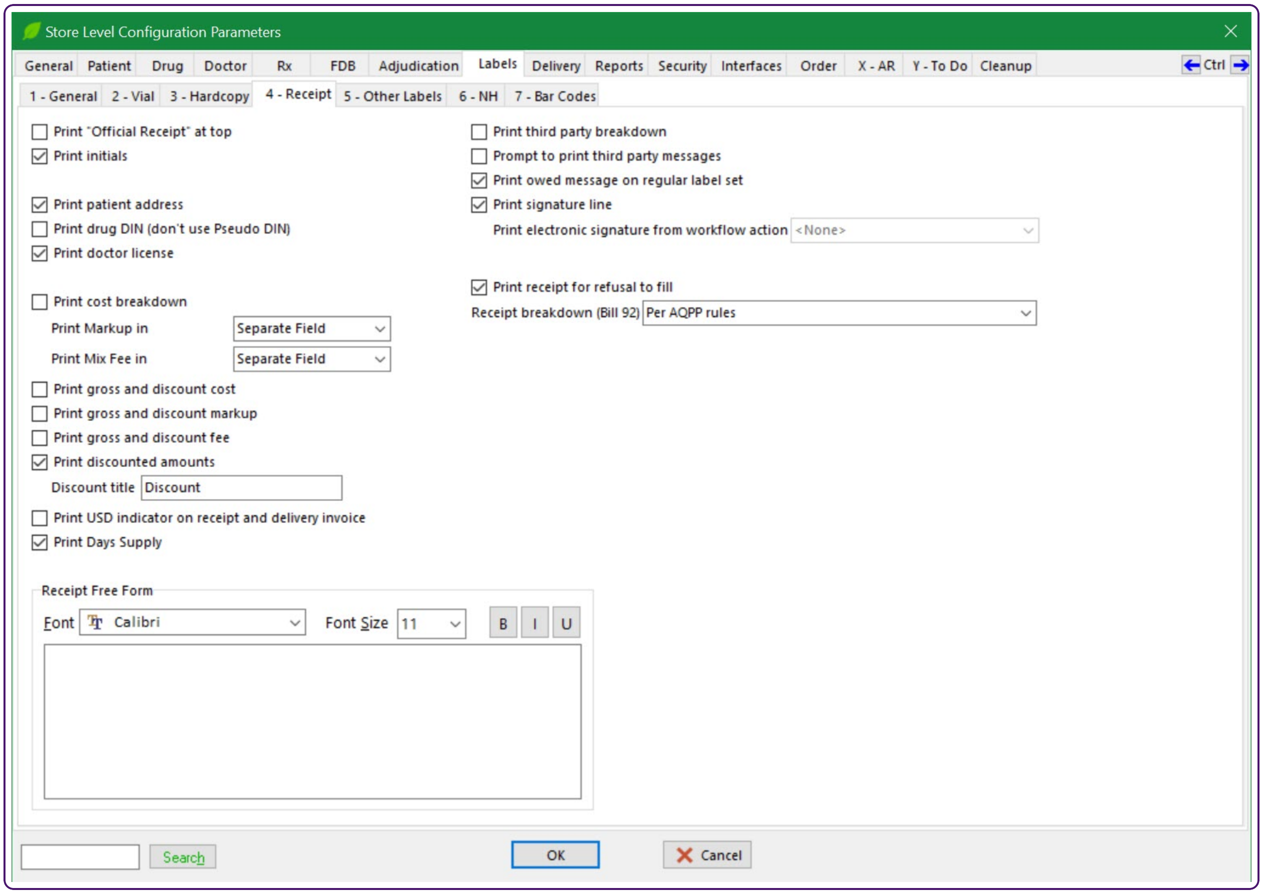


The following table describes the configuration settings on the **Labels** > **Hardcopy** tab.

Name	Description
Hardcopy TxNum prefix	The prefix that appears in front of the Rx number on the vial label. This is typically set to ‘Rx’, although some provinces set it to ‘Tx’.
Print store header on laser hardcopy	If selected, the header that configured in the **Labels** > **General** tab is printed on the laser hardcopy.
Print refill "days early/late" message	If selected, a message is printed letting the pharmacist know if the refill is early or late.
Print patient, drug, and doctor hardcopy comments	If selected, the comments entered on the F3, F5 or F7 windows are printed.
Do not print hardcopy when electronic signatures enabled	If selected, hardcopies are disabled if a signature pad is configured.
Hardcopy Rx Comment Priorities	Click to select the sequence in which Rx comments are printed.
Print fill time	If selected, the time at which the Rx was filled is printed.
Include due date in Rx messages	If selected, the due date for the Rx is included on the hardcopy.
Print Sig status on hardcopy	If selected, “New” prints in front of the sig if the signature has been changed since the original fill.

Name	Description
Print native language sig when printing foreign sig	If selected, the sig on the hardcopy is printed in the native language, even when printing a foreign language sig.
Print gross profit on hardcopy	If selected, the total gross profit is printed on the hardcopy.
Replace total with patient pays on dot matrix / thermal labels	If selected, the patient pays amount is printed on the label instead of the total cost.
Print transaction number on bottom of hardcopy	If selected, the Tx number is printed on the bottom of the hardcopy.
Print indications on Hardcopy	If selected, the indications are printed on the hardcopy.
Print gender	If selected, the patient’s gender is printed on the hardcopy.
Print allergies and conditions	If selected, the allergies and conditions from the patient profile are printed.
Print NH code	If selected, the nursing home code is printed on the hardcopy.
Print ward Short Form Code	If selected, the Ward Short Form Code is printed on the hardcopy.
Print NH room	If selected, the patient’s nursing home room number is printed on the hardcopy.
Print med type	If selected, the medication type is printed on the hardcopy.
Print pass times	If selected, the pass times are printed on the hardcopy.
Always print brand and generic drug names	If selected, the drug’s brand name and generic name are printed on the hardcopy.
Print pack size and cost	If selected, the pack size and cost of the pack are printed on the hardcopy.
Print lot and drug expiry date	If selected, the lot and expiry date are printed.
Print plan-specific DINS for mixtures	If selected, the DIN that is entered on the **Plans** tab on the **F5 - Mixture** window is printed.
Show default vendor's item number	If selected, the default vendor item number entered on the **Ordering** tab on the**F5 - Drug** window is printed on the hardcopy.
Print drug location	If selected, the location of the drug is printed, if the location was entered on the **F5 - Drug** window.
Print refrigerated product indicator	If selected, the refrigerated product indicator is printed, if applicable.
Print watermark on section	The types of hardcopies the watermark is printed on.
Print counselling on section	The types of Rxs that counselling information is printed for.
Print doctor license	Whether the doctor's license is printed on all, none, or select hard copies.
Print store header on laser hardcopy	If selected, the header that configured in the **Labels** > **General** tab is printed on the laser hardcopy.

Receipt



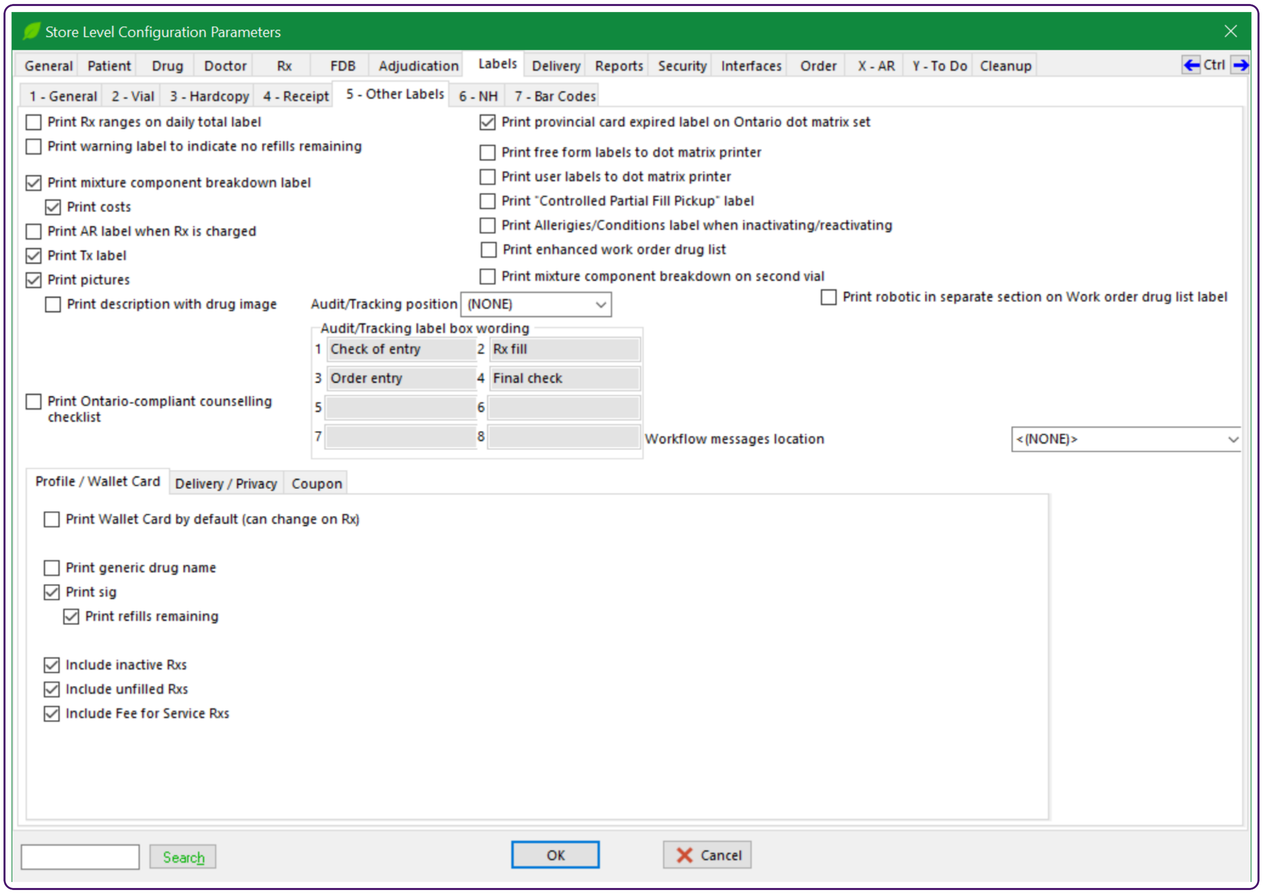
The following table describes the configuration settings on the **Labels** > **Receipt** tab.

Name	Description
Print "Official Receipt" at top	If selected, 'Official Receipt' is printed across the top of the laser receipt.
Print initials	If selected, the initials of the user who filled the prescription are printed on the receipt.
Print patient address	If selected, the address entered on the **F3 - Patient** window is printed on the hardcopy.
Print drug DIN	If selected, the DIN is printed on the receipt. This is required if the patient is using the official receipt to submit to a drug plan.
Print doctor license	If selected, the doctor's license number that is entered on the F7 - Doctor window is printed.
Print cost breakdown	If selected, the markup and mix fees are printed.
Print Markup in, **Print Mix Fee in**	Where the Markup and Mix Fee, respectively, are printed.
Print gross and discount cost	If selected, the cost of the drug and the discounted amount are printed.

Name	Description
Print gross and discount markup	If selected, the gross and discount markup are printed on the receipt.
Print discounted amounts	If selected, the discounted amounts are printed on the receipt.
Discount title	The name of the discount.
Print USD indicator on receipt and delivery invoice	If selected, a USD indicator (U.S. dollars) is printed on the receipt and invoice.
Print Days Supply	If selected, the days supply quantity is printed on the receipt.
Receipt Free Form	
Print third party breakdown	If selected, the amounts the third party paid are printed on the receipt.
Prompt to print third party messages	If selected, you are prompted to print third party messages on the receipt.
Print owed message on regular label set	If selected, the owed amount is printed on the bottom of the receipt, if an owing label is selected of the F12 window.
Print signature line	If selected, a signature line is printed at the bottom of the receipt for the pharmacist to sign.
Print electronic signature from workflow action	If selected, the pharmacist's signature is printed on the receipt when signed using the electronic signature pad.
Print receipt for refusal to fill	If selected, receipts are printed for refusal to fill Rxs.
Receipt breakdown (Bill 92)	Whether the receipt breakdown is always or never printed, or printed according to the AQPP rules.

Other Labels

The options on this tab vary depending on whether laser labels, dot matrix labels, or thermal printer labels are configured on the **General** tab. The options available for laser labels are described below.



The following table describes the configuration settings on the **Labels** > **Other Labels** tab.

Name	Description
Print Rx ranges on daily total label	If selected, the Rx regular and narcotic range used for the day is printed on the end of day totals.
Print warning label to indicate no refills remaining	If selected, a warning (auxiliary) label is printed, warning the patient that no repeats remain.
Print mixture component breakdown label	If selected, a mixture breakdown is printed when the Rx is a mixture.
Print costs	If selected, the Rx costs are printed on the label.
Print AR label when Rx is charged	If selected, the AR label is printed if an Rx is changed.
Print Tx label	If selected, the transmission label is printed.
Print pictures	If selected, drug pictures are printed.
Print description with drug image	If selected, the drug description is printed with the drug image.
Audit/Tracking position	The placement of the audit/tracking information (none, hardcopy, Tx label 1, or Tx label 2).

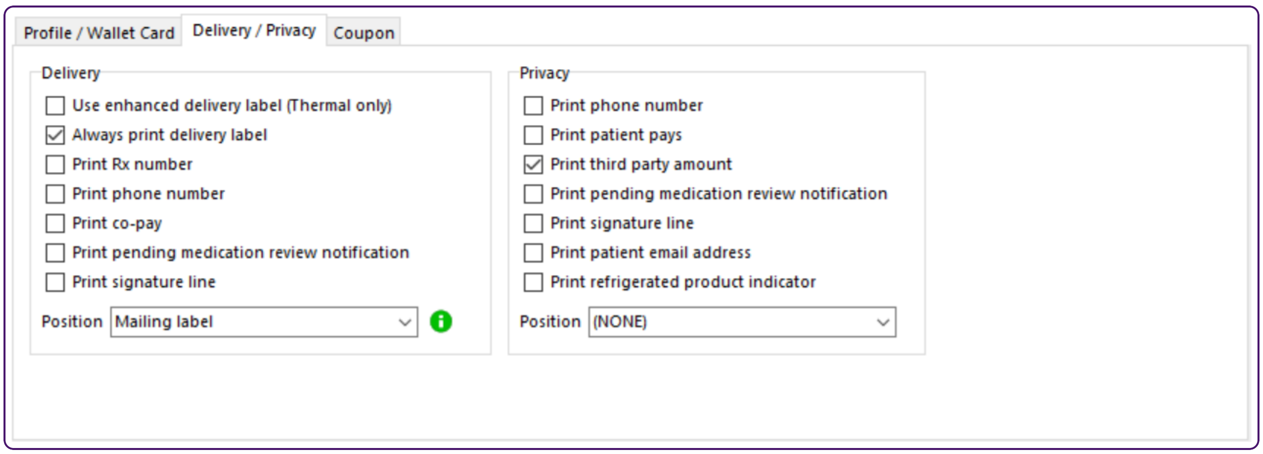
Name	Description
Audit/Tracking label box wording	The names of the audit/tracking steps that are printed on the label.
Print Ontario-compliant counselling checklist	(Ontario only) If selected, the Ontario-compliant counselling checklist is printed.
Print Provincial card expired label on Ontario dot matrix set	If selected, the expiry date that is entered on the F3 card is printed on the dot matrix label set.
Print free form labels to dot matrix printer	If selected, free form labels are sent to a configured dot matrix printer.
Print user labels to dot matrix printer	If selected, all user labels are sent to a configured dot matrix printer.
Print "Controlled Partial Fill Pickup" label	If selected, the Controlled Partial Fill Pickup label is printed after an Rx for a controlled drug is partially filled.
Print Allergies/Conditions label when inactivating/reactivating	If selected, allergies and conditions are printed when inactivating or reactivating Rxs.
Print enhanced work order drug list	If selected, the **Work Order Drug List** label is printed as part of the **Print Work Order Drug List** workflow action.
Print mixture component breakdown on second vial	If selected, the components within a mixture are printed on the second vial.
Print Robotic in separate section on Work order drug list label	If selected, the robotic barcode label is printed in a separate section on the work order drug list label.
Compliance label location, **Dose checking label location**, **Drug message location**, and **Workflow messages location**	The location of these four components with respect to other elements on the label.

Profile/Wallet Card

The following table describes the configuration settings on the **Labels** > **Other Labels** > **Profile/Wallet Card** tab.

Name	If selected...
Print Wallet card by default (can change on Rx)	A wallet-sized patient profile is printed on the bottom right hand side of laser label set.
Print generic drug name	The generic name of the drug is printed on the wallet card.
Print sig	The Rx sig is printed on the wallet card.
Print refills remaining	The number of remaining repeats per Rx are printed on the wallet card.
Include inactive Rxs	Inactive Rxs in the patient's profile are printed on the wallet card.
Include unfilled Rxs	Unfilled Rxs from the patients profile are printed on the wallet card.
Include Fee for Service Rxs	Select to include fee-for-service Rxs on the wallet card.

Delivery/Privacy



The following table describes the configuration settings on the **Labels** > **Other Labels** > **Delivery/Privacy** tab.

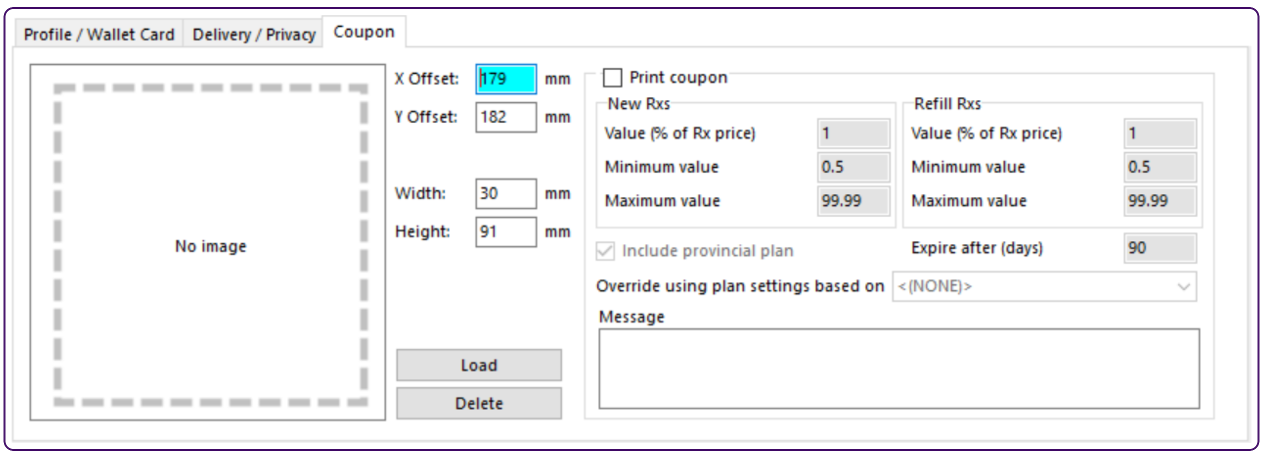
Name	Description
Use enhanced delivery label (Thermal only)	If selected, the enhanced version of the delivery label is used. This field is disabled if your store does not use thermal labels.
Always print delivery label	If selected, a delivery label is printed each time an Rx is filled.
Print Rx number	If selected, the Rx number is printed on the delivery label.
Print phone number	If selected, the phone number listed as the first phone number in the patient profile is printed on the delivery or privacy label, depending upon which checkbox is selected.
Print co-pay	If selected, the copay is printed on the delivery label.
Print pending medication review notification	If selected, a pending medication review is printed.

Name	Description
Print signature line	If selected, a signature line is printed on the delivery or privacy label, depending upon which checkbox is selected.
Position	For laser labels only, this identifies the position of the delivery or privacy label.
Print patient pays	If selected, the print includes the amount the patient pays.
Print third party amount	If selected, the print includes the third party amount.
Print pending medication review notification	If selected, the pending medication review notification is printed.
Print patient email address	If selected, the patient's email address is printed.
Print refrigerated product indicator	If selected, the refrigerated product indicator is printed.

Coupon

You can use the **Coupon** tab to specify the X and Y offset, and the height and width of printed coupons. Use the **Load** button to import a coupon image and adjust the parameters so it prints correctly.

The dollar value is set by the image and cannot be changed without loading a new image.

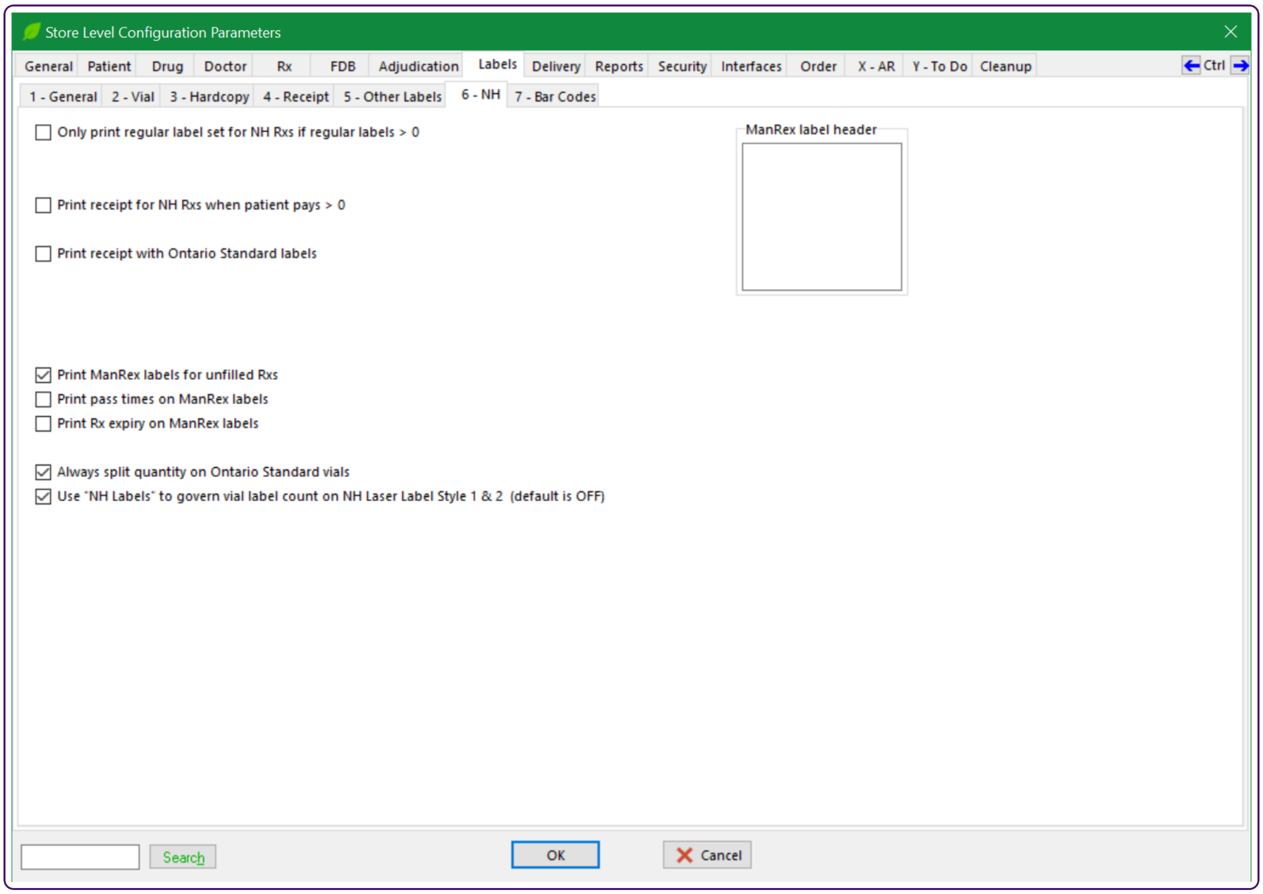


The following table describes the components on the **Labels** > **Other Labels** > **Coupon** tab.

Name	Description
X Offset, Y Offset, Width, and Height	The position and size of the coupon.
Load	Select to load the image you want to display on the coupon.
Delete	Select to delete the image.
Print coupon section	Select to print a coupon for **New Rxs** or **Refill Rxs**, or both. In one or both of these sections, enter a **Value (% of Rx price)** of the coupon, and enter the **Minimum value** and **Maximum value** to which the coupon can be applied.

Name	Description
Value (% of Rx price), **Minimum value**, and **Maximum value**	The discount percentage and amounts.
Include provincial plan	If selected, the provincial plan is considered when calculating coupon values.
Expire after (days)	The number of days in which the coupon will expire.
Override using plan settings based on	The criteria that overrides will be based on.
Message	The text to be printed on the coupon.

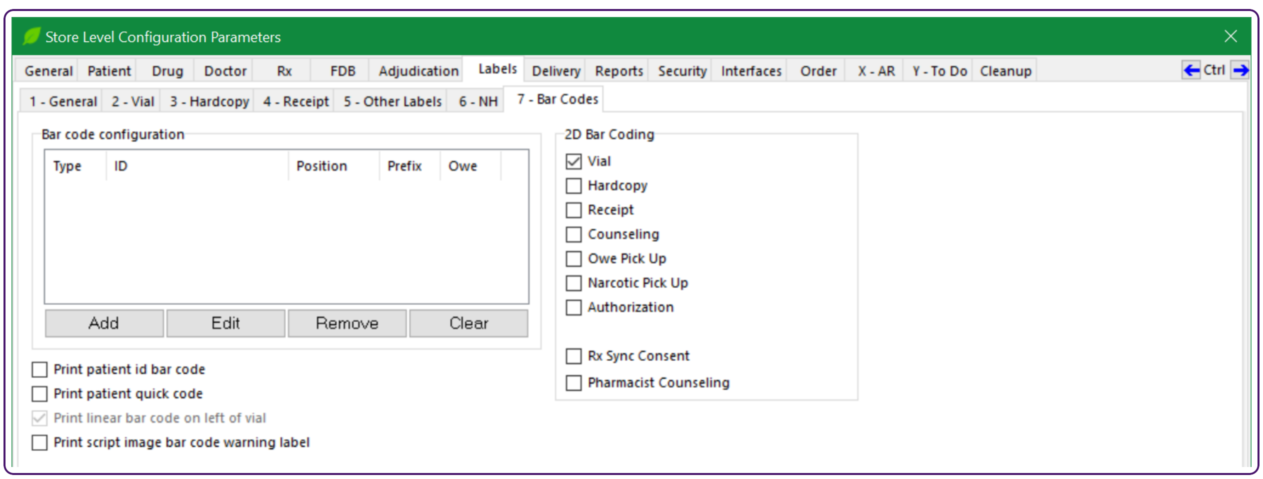
NH (nursing home)



The following table describes the configuration settings on the **Labels** > **NH** tab.

Name	Description
Only print regular label set for NH Rxs if regular labels > 0	If selected, a regular label set is printed if the number of NH regular labels on the F12 fill window is more than zero.
Print receipt for NH Rxs when patient pays > 0	If selected, a laser receipt is printed when a nursing home patient pays more than zero.
Print receipt with Ontario Standard labels	If selected, a receipt is printed with the Ontario Standard labels.
Print ManRex labels for unfilled Rxs	If selected, a ManRex label is printed for unfilled Rxs if ManRex labels are selected as the label set for the nursing home (under **Labels** > **General**).
Print pass times on ManRex labels	If selected, the pass times that are set on the F12 fill window under ALT N are printed if ManRex labels are set for nursing home (under **Labels** > **General**)..
Print Rx expiry on ManRex labels	If selected, the prescription's expiry date is printed on the ManRex label if ManRex labels are set for the nursing home (under **Labels** > **General**).
Always split quantity on Ontario Standard vials	(Ontario only) if selected, the quantity is split when using Ontario standard vials.
Use "NH labels" to govern vial label count on NH Laser Label Style 1 & 2	If selected, the **NH Label** field on the **Fill Rx** window is used to control the number of vial labels used for NH laser label styles 1 & 2.
ManRex label header	The pharmacy's address information as it appears on ManRex labels.

Bar Codes



You can use the **Bar Codes** tab to set up bar codes. You must know what type of system you are using, as not all POS systems are interfaced with Kroll.

1. Select **Add** or select a row from the table and then select **Edit** .

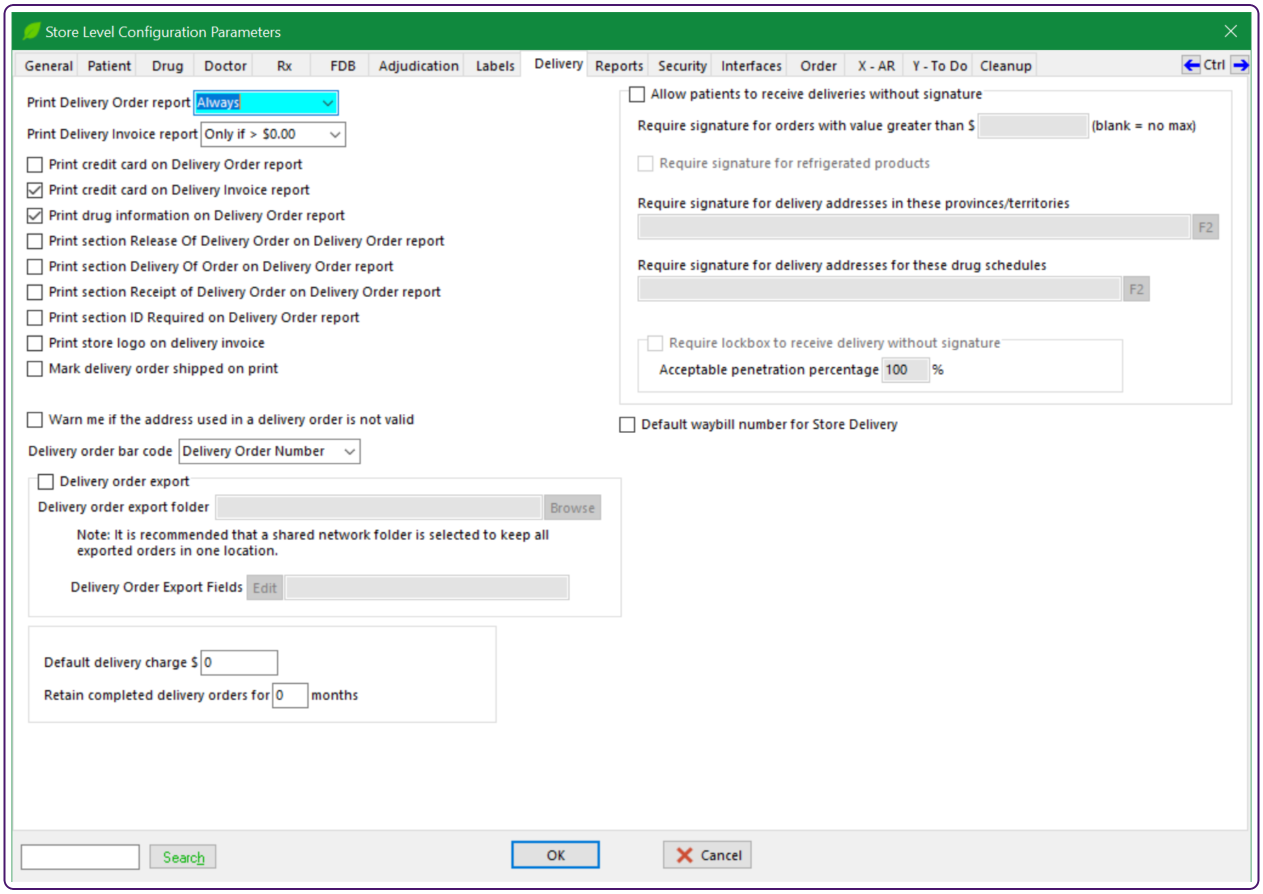
   The **Edit bar code** popup is displayed.

2. Select the bar code **Type** and **Position**.
3. Use the checkboxes to select where you want the barcode to be printed, and the **2D Bar Coding**.

   Typically, barcodes are placed on receipts and privacy labels.
4. Select **OK**.

Delivery

The options selected for the delivery order report will vary depending on the needs of the pharmacy.



The following table describes the configuration settings on the **Delivery** tab.

Name	Description
Print Delivery Order report, **Print Delivery Invoice Report**	When the Print Delivery Order and Print Delivery Invoice reports, respectively, are generated (Always, Never, or Only if > $0.00)
Print Credit Card on Delivery Order Report, **Print Credit Card on Delivery Invoice Report**	If selected the credit card number is printed on the Print Delivery Order and Print Delivery Invoice reports, respectively.
Print drug information on Delivery Order report	If selected, the drug name and drug information are printed on the Delivery Order report.

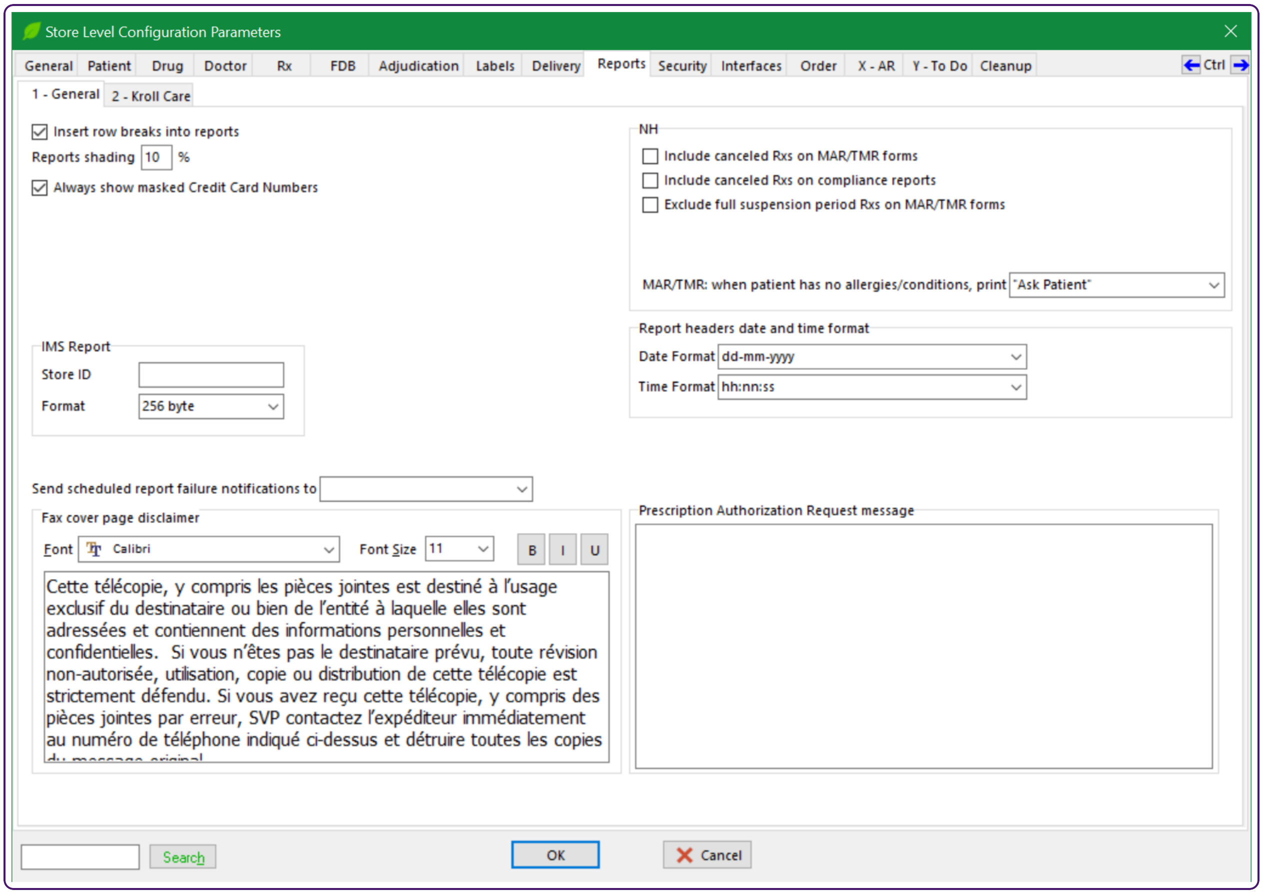
Name	Description
Print section Release of Delivery Order on Delivery Order report, **Print section Delivery of Order on Delivery Order report**, **Print section Receipt of Delivery Order on Delivery Order report**, **Print section ID Required on Delivery Order report**.	If selected, the **Release of Delivery Order**, **Delivery of Order**, **Receipt of Delivery Order**, and **ID Required** sections are printed on the Delivery Order report.
Print store logo on delivery invoice	If selected, the **General Store Logo** from the **General** tab is printed.
Mark delivery order shipped on print	If selected, the delivery order is marked as shipped when the receipt is printed.
Warn me if the address used in the delivery order is not valid	If selected, the user is warned if the delivery address that was entered is not valid.
Delivery order bar code	The number that is used for delivery bar codes.
Delivery order export	If selected, a file is created that contains the information from the delivery order report.
Delivery order export folder	The folder where delivery order exports are saved. A shared network folder is recommended.
Delivery Order Export Fields	The fields that are displayed on the Delivery Order Report. Select **Edit** to change these fields.
Default delivery charge	The default fee charged for deliveries.
Retain completed delivery orders for [x] months	The number of months delivery orders will be kept. Delivery orders cannot be deleted until they are older than the number specified.
Allow patients to receive deliveries without signature	If selected, patients can receive deliveries without signing for them.
Require signature for orders with value greater than $[x]	If selected, signature is required for orders with values greater than the number supplied.
Require signature for refrigerated products	If selected, signature is required for refrigerated products.
Require signature for delivery addresses in these provinces/territories	If selected, signature is required for delivery addresses in the selected provinces and territories.
Require signature for products under these schedules	If a drug belongs to one of the drug schedules listed here, and that drug is included in a delivery, the recipient must sign for the delivery.

Name	Description
Require lockbox to receive delivery without signature and **Acceptable penetration percentage**	Select **Require lockbox to receive delivery without signature** to indicate that the patient must receive their mail in a lockbox if they want to receive their order without a signature. Whether a patient has a lockbox is based on a file provided by Canada Post that lists the postal codes and the percentage of addresses for each postal code that have lockboxes. If this checkbox is selected, the system looks up the postal code and if the corresponding penetration percentage is greater than or equal to the value of the **Acceptable penetration percentage** field that you set beneath the **Require lockbox to receive delivery without signature** checkbox, the order is eligible for delivery without signature. For example, if you selected the **Require lockbox to receive delivery without signature** checkbox and set **Acceptable penetration percentage** to 95%, signature is not required for residents with postal codes where >=95% of the mailboxes are in lockboxes.
Default waybill number for Store Delivery	If selected, the default waybill number is used for store deliveries; otherwise, you can enter a waybill when completing the delivery order.

Reports

The following section describes the configuration settings available on the **Reports** tab.

General



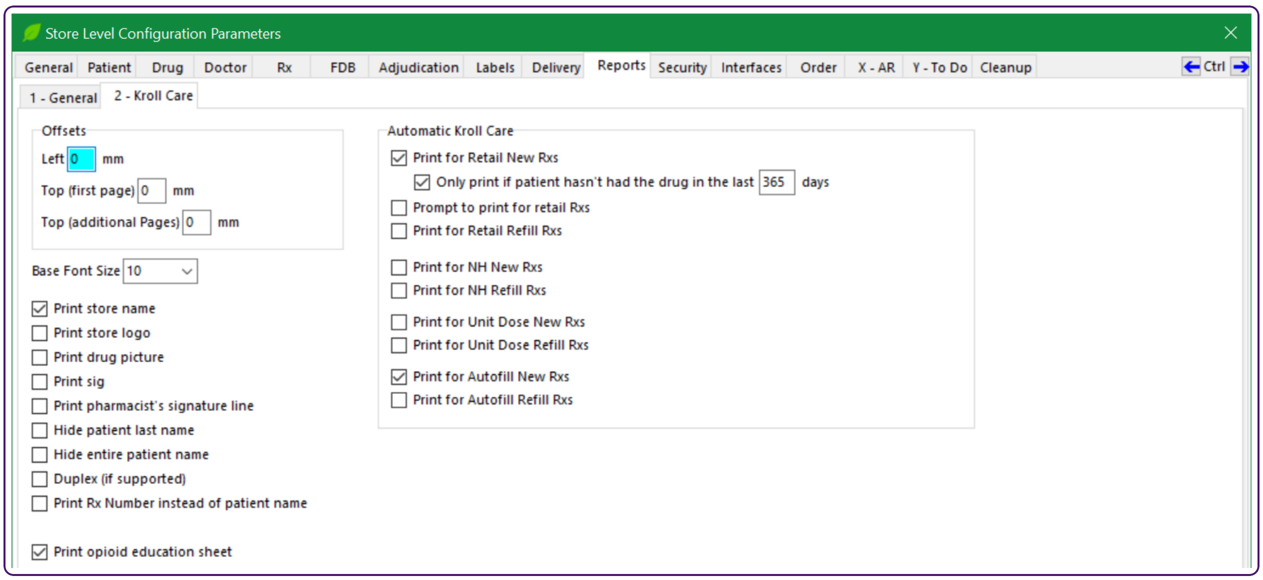
The following table describes the configuration settings on the **Reports** > **General** tab.

Name	Description
Insert row breaks into report	If selected, blank space is inserted between rows on the report.
Reports shading [x] %	The percentage of visual shadow used on the report, to make the data easier to read.
Always show masked Credit Card Numbers	If selected, credit card numbers are masked on reports.
Store ID and **Format**	The Store ID and format needed to run the IMS report.
Send scheduled report failure notifications to	The user on the Kroll mailing list who receives failure notifications.
Fax cover page disclaimer	The text of the disclaimer to be printed on the fax cover page.
Include canceled Rxs on MAR/TMR forms	If selected, cancelled Rxs are displayed on Mar and TMR forms.
Include cancelled Rxs on compliance reports	If selected, cancelled Rxs are displayed on the compliance reports.

Name	Description
Exclude full suspension period Rxs on MAR/TMR forms	If selected, and an Rx is suspended during the period specified by the start and stop dates of a MAR or TMR report, that Rx is excluded from the report.
MAR/TMR: when patient has no allergies/conditions, print	The text that is printed, if applicable, when the patient does not have any allergies or conditions.
Date Format and **Time Format**	The formats used for dates and times.
Prescription Authorization Request message	The text of the prescription authorization request.

Kroll Care

Kroll Care, also known as the patient information leaflet, explains what a drug is used for, how the patient should take it, and its precautions, side effects, and so on.



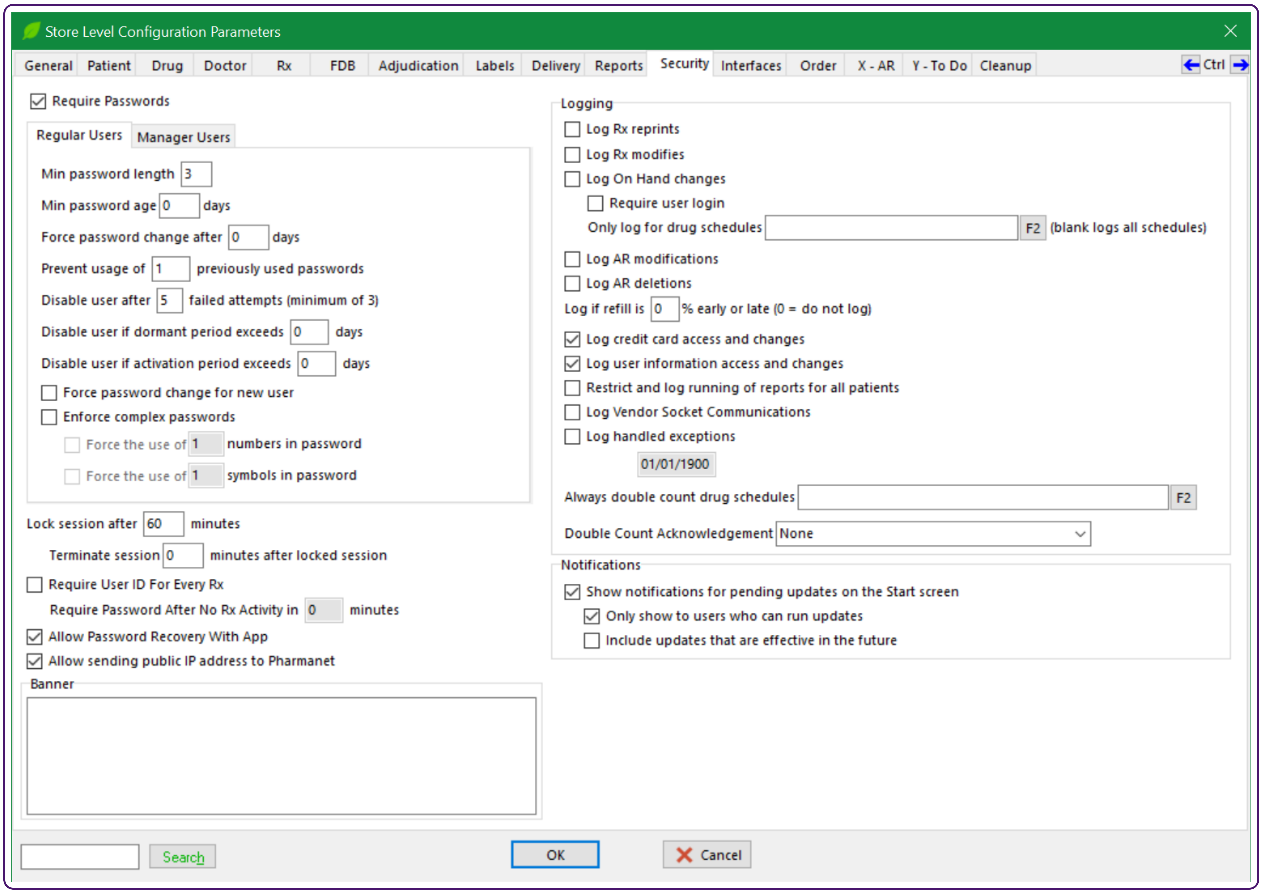
The following table describes the configuration settings on the **Reports** > **Kroll Care** tab.

Name	Description
Offsets section	The printing parameters. By default, these are all set to 0..
Base Font Size	The base font size for Kroll reports.
Print store name	If selected, you are asked whether you want to print the pharmacy name at the top of the Kroll Care leaflet.
Print store logo	If selected, you are asked whether you want to print the store logo at the top of the Kroll Care leaflet.
Print drug picture	If selected, you are asked whether you want to print a picture of the drug at the top of the Kroll Care leaflet.
Print sig	If selected, you are asked whether you want to print the doctor's directions at the top of the Kroll Care leaflet.

Name	Description
Print pharmacist's signature line	If selected, you are asked whether you want to print a signature line at the top of the Kroll Care leaflet.
Hide patient last name	If selected, the patient's last name is not printed at the top of the Kroll Care leaflet.
Hide entire patient name	If selected, the patient's name is not printed at the top of the Kroll Care leaflet.
Duplex (if supported)	If selected, duplex (double-sided) printing is allowed if it is supported.
Print Rx Number instead of patient name	If selected, the patient's name is printed on the leaflet instead of the Rx number.
Print opioid education sheet	If selected, the opioid education sheet is printed
Print for Retail New Rxs	If selected, you are asked if you want to print a Kroll Care leaflet for retail new Rxs.
Only print if patient hasn't had the drug in the last [x] days	A Kroll Care leaflet is printed only if the patient has not had the medication in a specified number of days.
Prompt to print for retail Rxs	If selected, you are asked if you want to print a Kroll Care leaflet if you are filling for a retail (non-nursing home) Rx.
Print for Retail Refill Rxs	If selected, you are asked if you want to print a Kroll Care leaflet for refill Rxs.
Print for NH New Rxs, **Print for NH Refill Rxs**	If selected, you are asked if you want to print a Kroll Care leaflet for Nursing Home new and refill Rxs, respectively. These checkboxes are rarely enabled.
Print for Unit Dose New Rxs, **Print for Unit Dose Refill Rxs**	If selected, you are asked if you want to print a Kroll Care leaflet for unit dose or compliance pack Rxs, for new or refill Rxs, respectively.
Print for Autofill New Rxs, **Print for Autofill Refill Rxs**	If selected, you are asked if you want to print a Kroll Care leaflet for new or refill Rxs, respectively, that are automatically filled in a retail batch.

Security

You can use the **Security** tab to configure the level of security within the application. The fields on this tab vary according to the store, chain, and province. The same fields are displayed on both the **Regular Users** and **Manager Users** sub-tabs.



The following table describes the configuration settings on the **Security** tab.

Name	Description
Require Passwords	If selected, users must enter a password when logging into Kroll.
Min password length	The minimum number of characters a password may contain.
Min password age	The number of days that must pass before a password can be reused.
Force password change after [x] days	The number of days that passwords remain valid. If this is blank, users will never be prompted to change their passwords.
Prevent usage of [x] previously used passwords	The number of previously used of passwords that cannot be reused.
Disable user after [x] failed attempts	The number of times a user can unsuccessfully enter a password before their account is disabled.
Disable user if dormant period exceeds [x] days	The number of days after which to disable a user if they have not been active in Kroll.
Disable user if activation period exceeds [x] days	The number of days after which to disable a user if they have not yet activated their account.
Force password change for new user	If selected, new users are prompted to change their password the first time they log in. This is on by default.

Name	Description
Enforce complex passwords section	If selected, you can use the fields in this section to choose the amount of numbers and symbols passwords must contain.
Lock session after [x] minutes	The number of minutes of inactivity that must pass before the user is logged out.
Terminate session [x] minutes after locked session	The number of minutes after a session has been locked that it will be terminated.
Require User ID for Every Rx	If selected, the user must enter their login credentials before filling an Rx.
Require Password after no Activity in [x] Minutes	When the session is unattended for this number of minutes, you must login again to resume your session.
Allow Password Recovery With App	If selected, the user can recover their password through the app.
Allow sending public IP address to Pharmanet	If selected, the public IP address can be sent to Pharmanet.
Banner	If selected, users have to acknowledge a configurable banner before they can log into Kroll.
Log Rx reprints, **Log Rx Modifies**	If selected, a log entry is created when an Rx is reprinted or modified, respectively.
Log On Hand changes	If selected, a log entry is created when the on-hand quantity is changed.
Require user login	If selected, you must log in before you can changed on-hand values.
Only log for drug Schedules	The selected drug schedules are logged.
Log AR modifications, Log AR deletions	If selected, a log entry is created when an AR setting is modified or deleted, respectively.
Log if refill is [x]% early or late	A log entry is created when refills are early or late by the specified percentage.
Log credit card access and changes	If selected, a log entry is created when a credit card is accessed or modified.
Log user information access and changes	If selected, a log entry is created when a user account is accessed or modified.
Restrict and log running of reports for all patients	If selected, a log entry is created and login credentials are required when reports are run for all patients.
Log Vendor Socket Communications and **Log handled exceptions**	If selected, vendor sockets and handled exceptions, respectively, are included in the log.
Always double count drug schedules	The categories of drugs that must always be counted twice.
Double Count Acknowledgement	The type of acknowledgment required when performing double counts.
Show notifications for pending updates on the Start screen	If selected, notifications for pending updates are displayed on the Alt+X - Start screen.

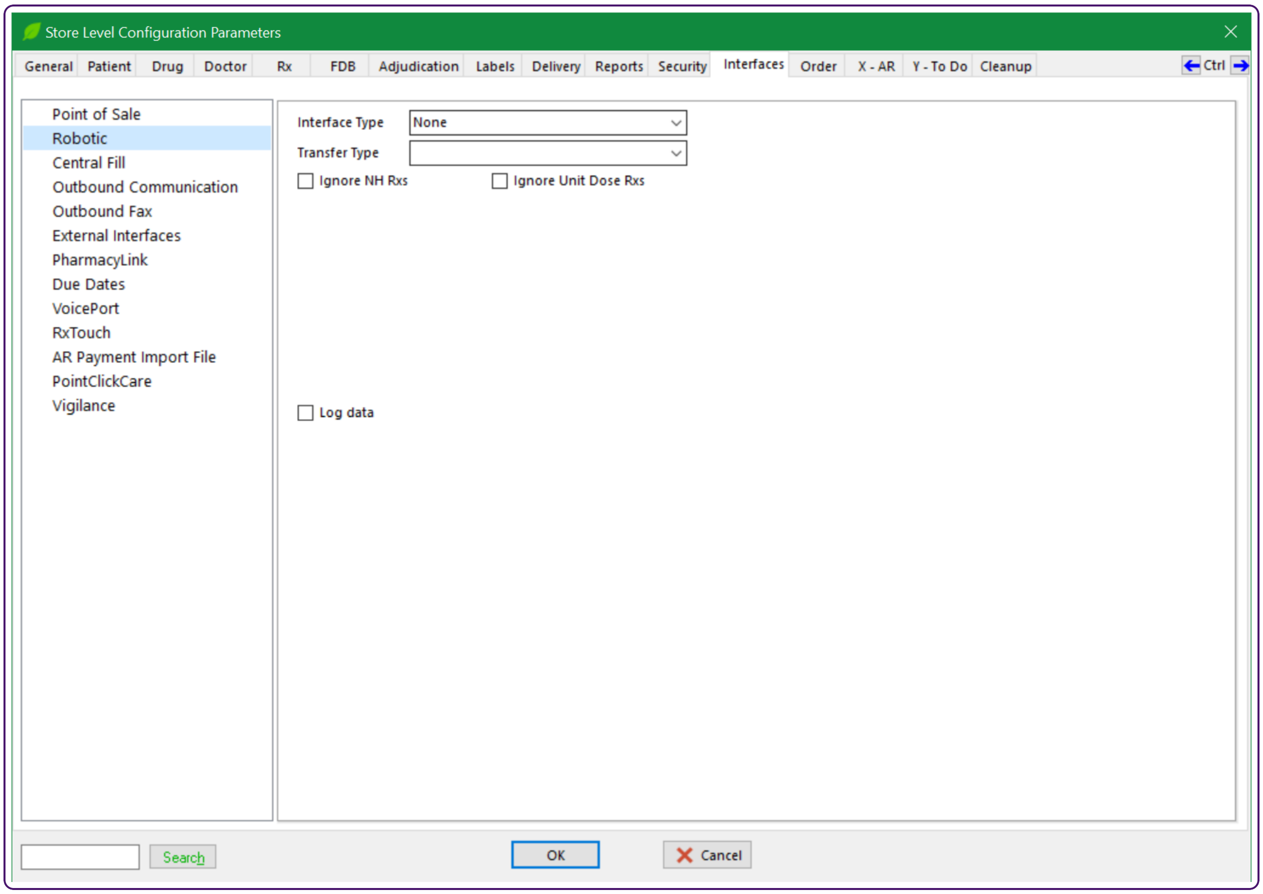
Name	Description
Only show to users who can run updates	If selected, notifications are only shown to users who can run updates.
Include updates that are effective in the future	If selected, notifications about future updates are included.

Interfaces

The following section describes the configuration settings available on the **Interfaces** tab. These settings vary depending on which interface is selected.

Point of Sale/Robotic

The **Point of Sale** and **Robotic** selections on the **Interfaces** tab are mostly identical, although the Robotic selection has an additional **Log data** field.

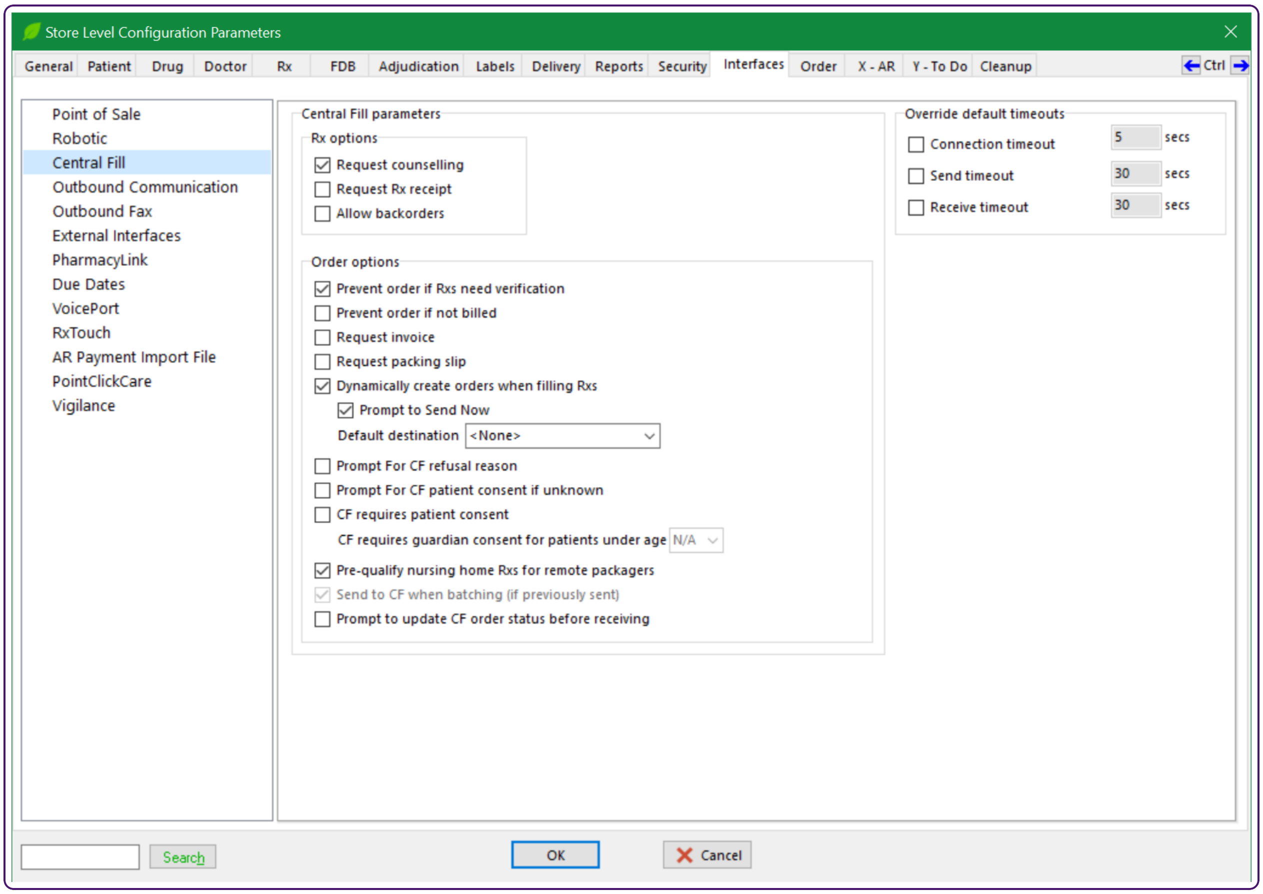


The following table describes the configuration settings on the **Interfaces** tab when **Point of Sale** or **Robotic** is selected.

Name	Description
Interface Type	The type of interface.
Transfer Type	The method by which the files will be transferred. The Robotic **Interface Type** you select may limit which transfer types are available.
Ignore NH Rxs and **Ignore Unit Dose Rxs**	If selected, nursing home Rxs or Unit Dose Rxs, respectively, are ignored.
Log data	If selected, data is logged for the robotic interface.

Central Fill

The **Central Fill** tab only appears if the Central Fill module has been enabled (**Configuration** > **Kroll** > **Modules** > **Central Fill**). Note that this is a billable module. Central Fill enables users to process an Rx at one location and send it to Central Fill where it is dispensed, packaged, and shipped back to the store, directly to the patient, or to a nursing home.



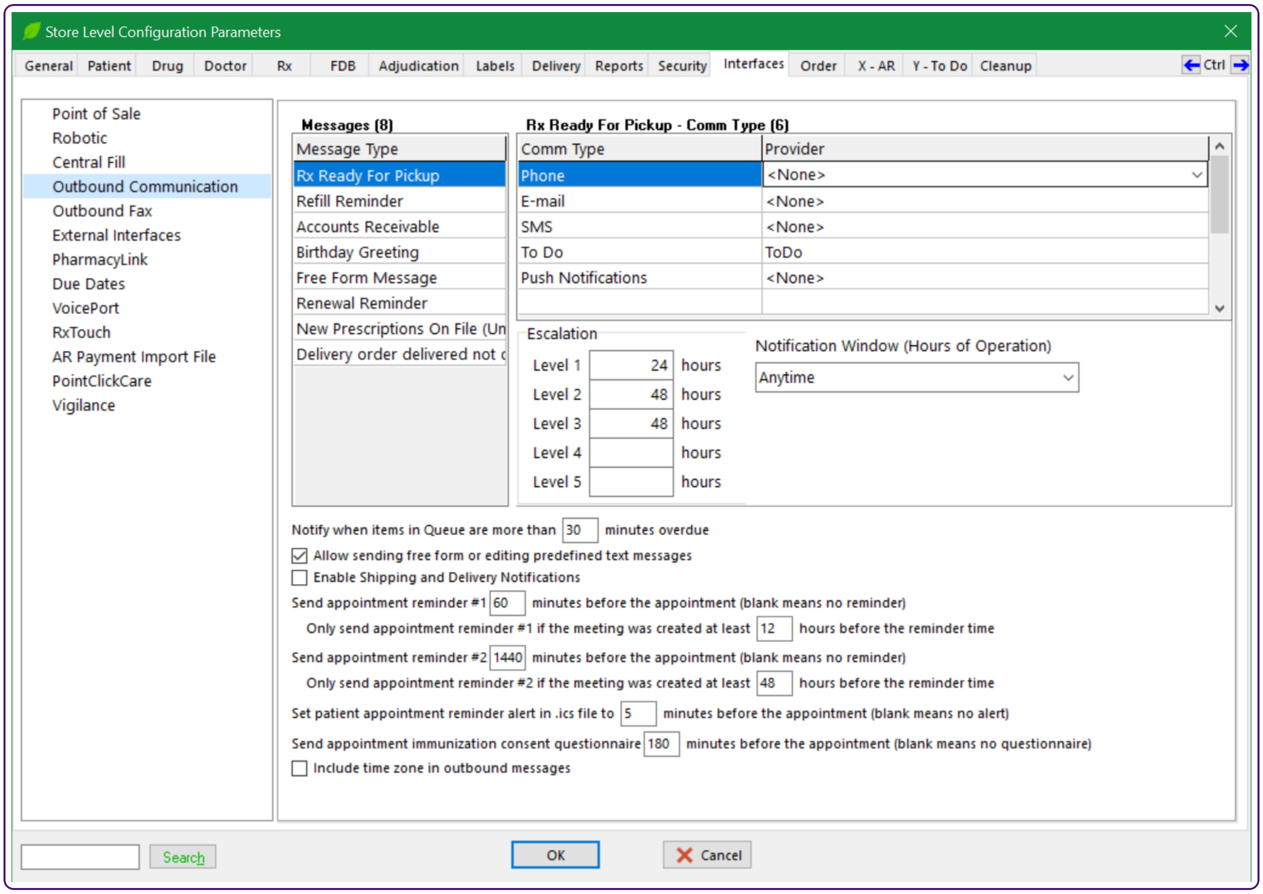
The following table describes the configuration settings on the **Interfaces** tab when **Central Fill** is selected.

Name	Description
Request counselling	If selected, prompts for counselling on the client side.
Request Rx receipt	If selected, prompts for a receipt.

Name	Description
Allow backorders	If selected, Rxs can be filled even if the quantity of drugs is insufficient.
Prevent order if Rxs need verification	If selected, you cannot complete orders for Rxs that require verification.
Prevent order if not billed	If selected, you cannot orders that have not been billed/adjudicated.
Request invoice	If selected, an invoice is printed, showing a successful transfer.
Request packing slip	If selected, the CF facility is requested to include either an invoice and/or a packing slip with an order.
Dynamically create orders when filling Rxs	If selected, a CF order is automatically created to be sent to the CF host when filling an Rx.
Prompt to Send Now	If selected, you are prompted to immediately send CF orders to the CF host.
Default destination	The central fill site that is pre-selected as the destination for data transmission.
Prompt For CF refusal reason	If selected, you are prompted to enter a refusal reason if you opt not to send an Rx to the CF host.
Prompt For CF patient consent if unknown	If selected, you are prompted for the patient consent if the patient consent is unknown.
CF requires patient consent	If selected, you are prompted to ask the patient if they would like to participate in the central fill program.
Central Fill requires guardian consent for patient under age [x]	The age under which patients will need a parent or guardians permission to participate in the CF program.
Pre-qualify nursing home Rxs for remote packagers	If selected, all NH prescriptions are eligible to be filled by a packager, by default.
Send to CF when Batching (if previously sent)	If selected, when performing a batch fill, the system references the last time the Rx was sent to CF and sends it again. The drug must be eligible for CF.
Prompt to update CF order status before receiving	If selected, you will not be able to receive a CF order unless you have updated the order status to the filled state. When updating the order status, a request is sent to the CF host to determine the status of the order.
Override default timeouts	The timeout parameters for **Connection Timeouts**, **Send Timeouts**, and **Receive Timeouts**.

Outbound Communication

The Outbound Communication interface works in conjunction with the IVR system (Voiceport and VoiceTech). Your pharmacy must use the most recent version of the IVR system.



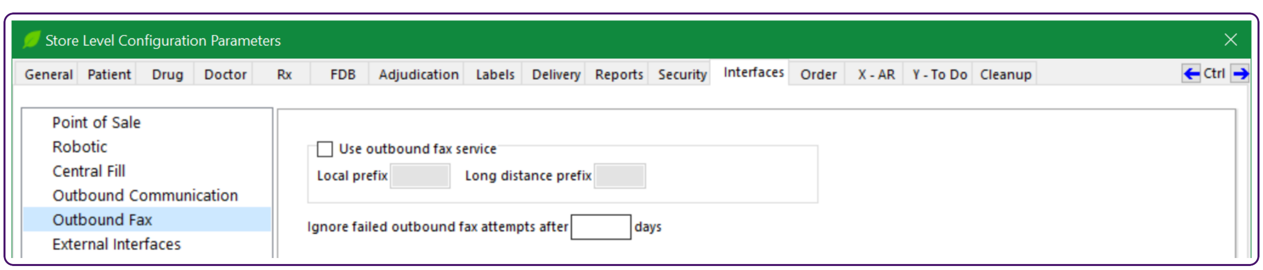
The following table describes the configuration settings on the **Interfaces** tab when **Outbound Communication** is selected.

Name	Description
Message Type	The type of message.
Comm Type	The communication type, such as phone or e-mail.
Provider	The provider of the communication type.
Level 1, Level 2, Level 3, Level 4, Level 5	The escalation levels you want to assign to the selected communication type. Level 1 is the number of hours that will elapse before the patient is contacted a second time, Level 2 is the number of hours that will elapse before the patient is contacted a third time, and so on.
Notification Window (Hours of Operation)	The window of time during which the selected communication type can be sent.
Notify when items in Queue are more than [x] minutes overdue	If a number of minutes is entered, notifications are sent when the items in the queue are older than that number.

Name	Description
Allow sending free form or editing predefined text messages	If selected, users can enter custom messages or edit predefined messages.
Enable Shipping and Delivery Notifications	If selected, shipping and delivering notifications are sent.
Send appointment reminder #1 [x] minutes before the appointment	The number of minutes before each appointment that the first reminder is sent. If blank, the first reminder is not sent.
Only send appointment reminder #1 if the meeting was created at least [x] hours before the reminder time	If the appointment was created less than the number of hours ago specified by this field, the first reminder is not sent.
Send appointment reminder #2 [x] minutes before the appointment	The number of minutes before each appointment that the second reminder is sent. If blank, the second reminder is not sent.
Only send appointment reminder #2 if the meeting was created at least [x] hours before the reminder time	If the appointment was created less than the number of hours ago specified by this field, the second reminder is not sent.
Set patient appointment reminder alert in .ics file to [x] minutes before the appointment	The number of minutes before the appointment that the reminder alert in the .ics file is set to . If blank, no alert is sent.
Send appointment immunization consent questionnaire [x] minutes before the appointment	The number of minutes before the appointment that the immunization consent questionnaire is sent. If blank, no questionnaire is sent.
Include time zone in outbound messages	If selected, the time zone is included in outbound messages.

Outbound Fax

The **Outbound Fax** tab displays the settings used when sending faxes.



The following table describes the configuration settings on the **Interfaces** tab when **Outbound Fax** is selected.

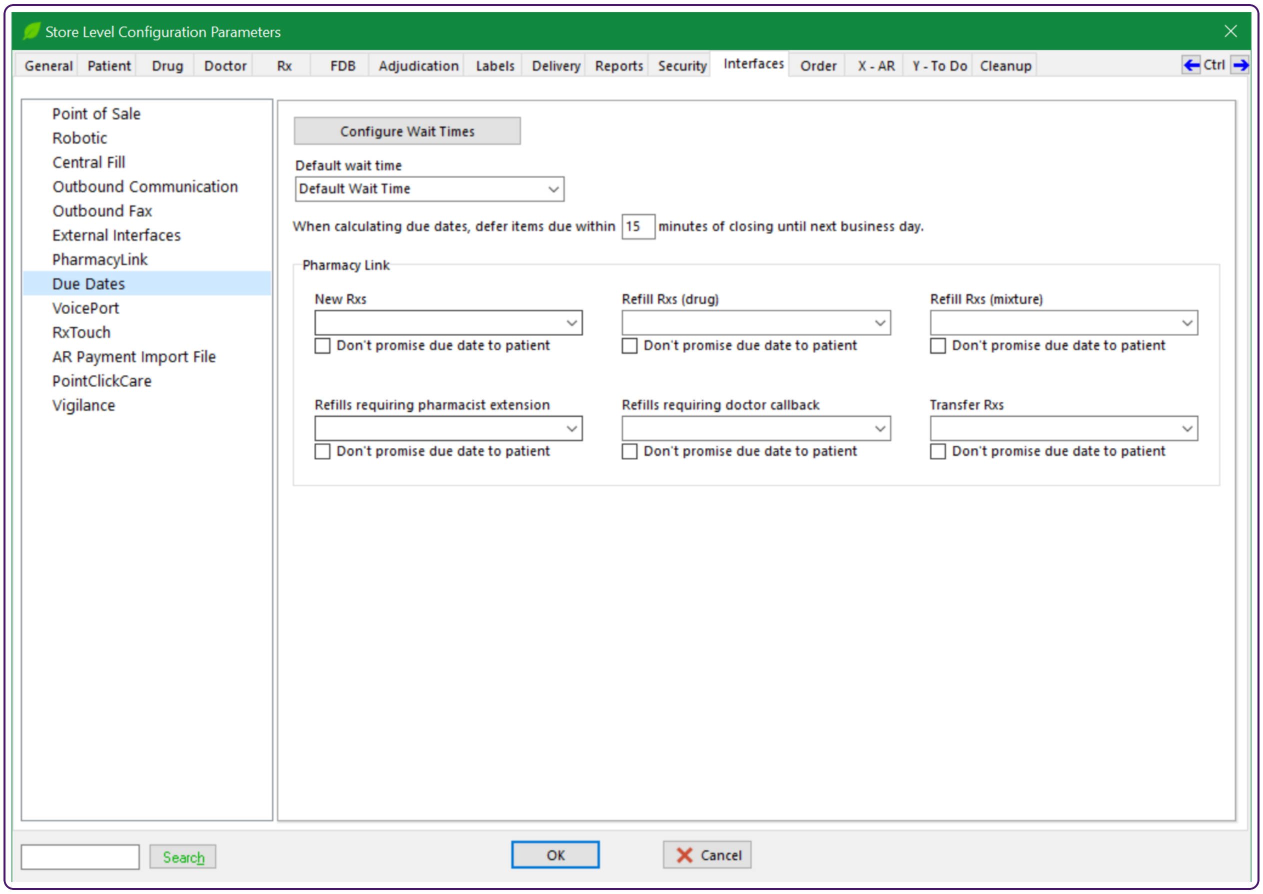
Name	Description
Use outbound fax service	If selected, this service is used.
Local prefix and **Long distance prefix**	The prefixes used by the outbound fax.
Ignore failed outbound fax attempts after [x] days	The number of days after which to ignore failed outbound fax attempts.

External Interfaces

The **External Interfaces** tab lists the external interfaces that have been defined.

Due Dates

You can use the **Due Dates** tab to configure the wait times and due dates.

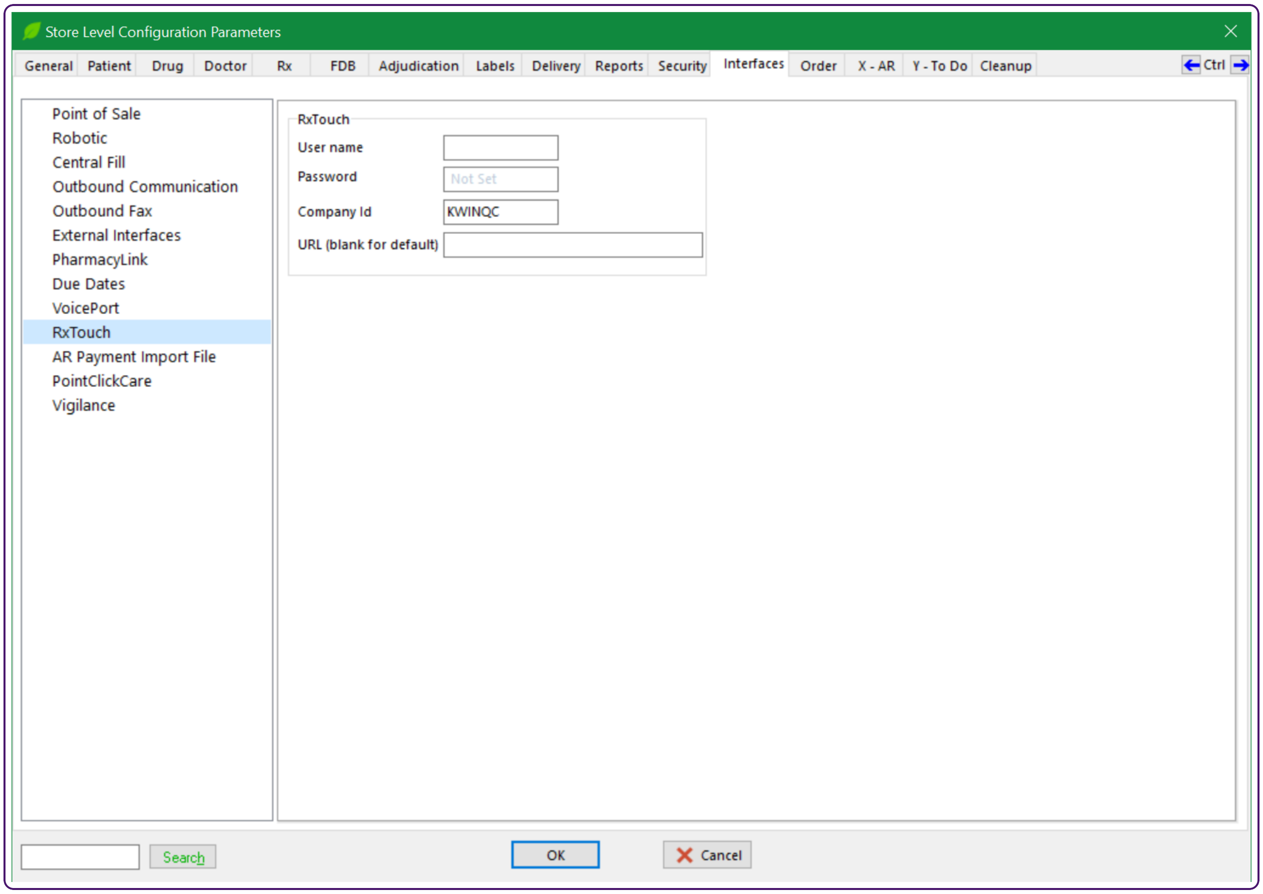


The following table describes the fields on the **Due Dates** tab.

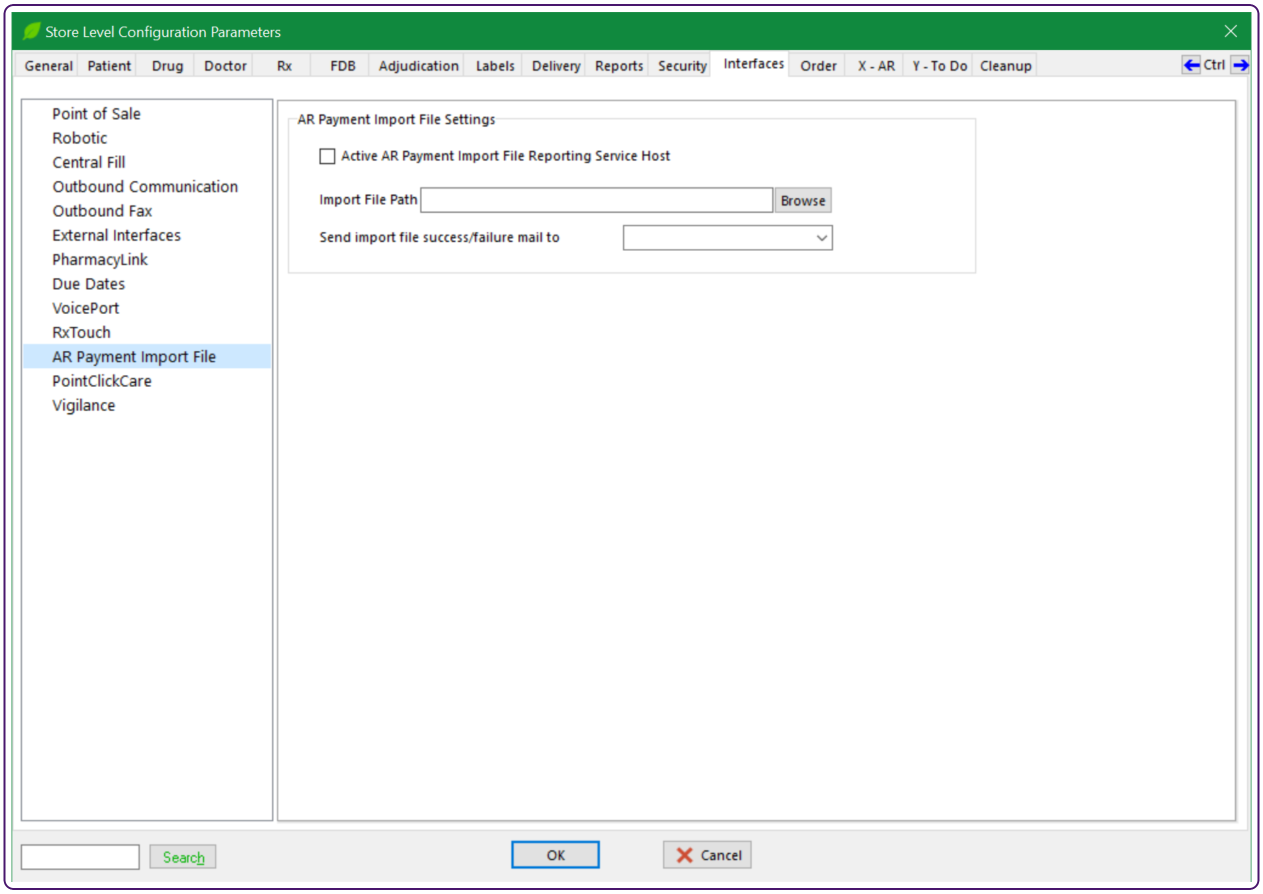
Name	Description
Configure Wait Times	Select this button to define the wait times used by the fields on this tab.
Default wait time	The wait time that is used if a specific wait time is not set for an item.
When calculating due dates, defer items within [x] minutes of closing until next business day	If an item's due date is this number of minutes before closing, its due date will be deferred to the next day.
Other drop-down lists on this tab	The waiting times used by various items.
Don't promise due date to patient fields	If selected, the pharmacy will contact the patient when the prescription is ready for pickup or delivery.

VoicePort, RxTouch, and Vigilance

These tabs list the settings needed to connect to VoicePort, RxTouch, and Vigilance.



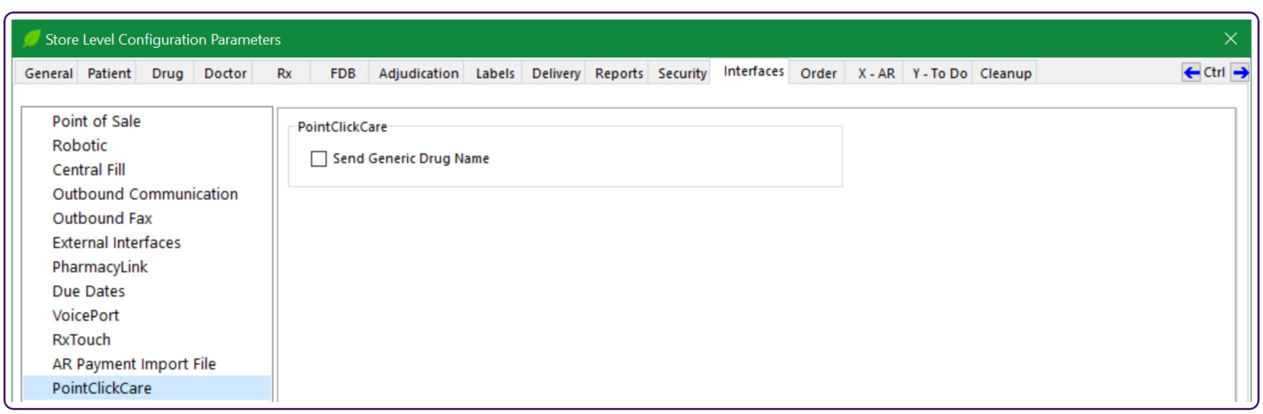
AR Payment Import File



Use this tab to configure the AR Payment Import file.

PointClickCare

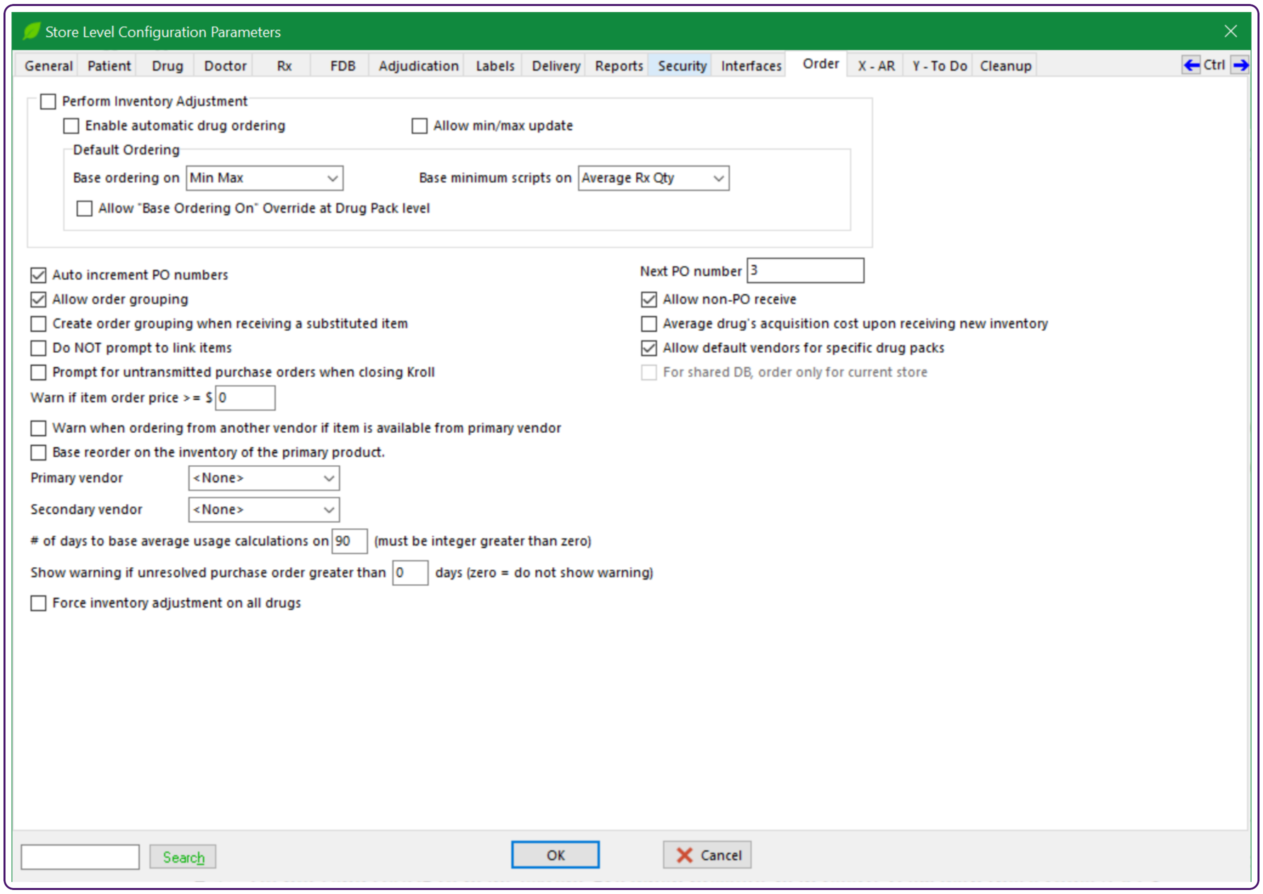
This tab is used if the PointClickCare software is connected.



If **Send Generic Drug Name** is selected, the generic drug name is sent instead of the brand name.

Order

The following section describes the configuration settings available on the **Order** tab.



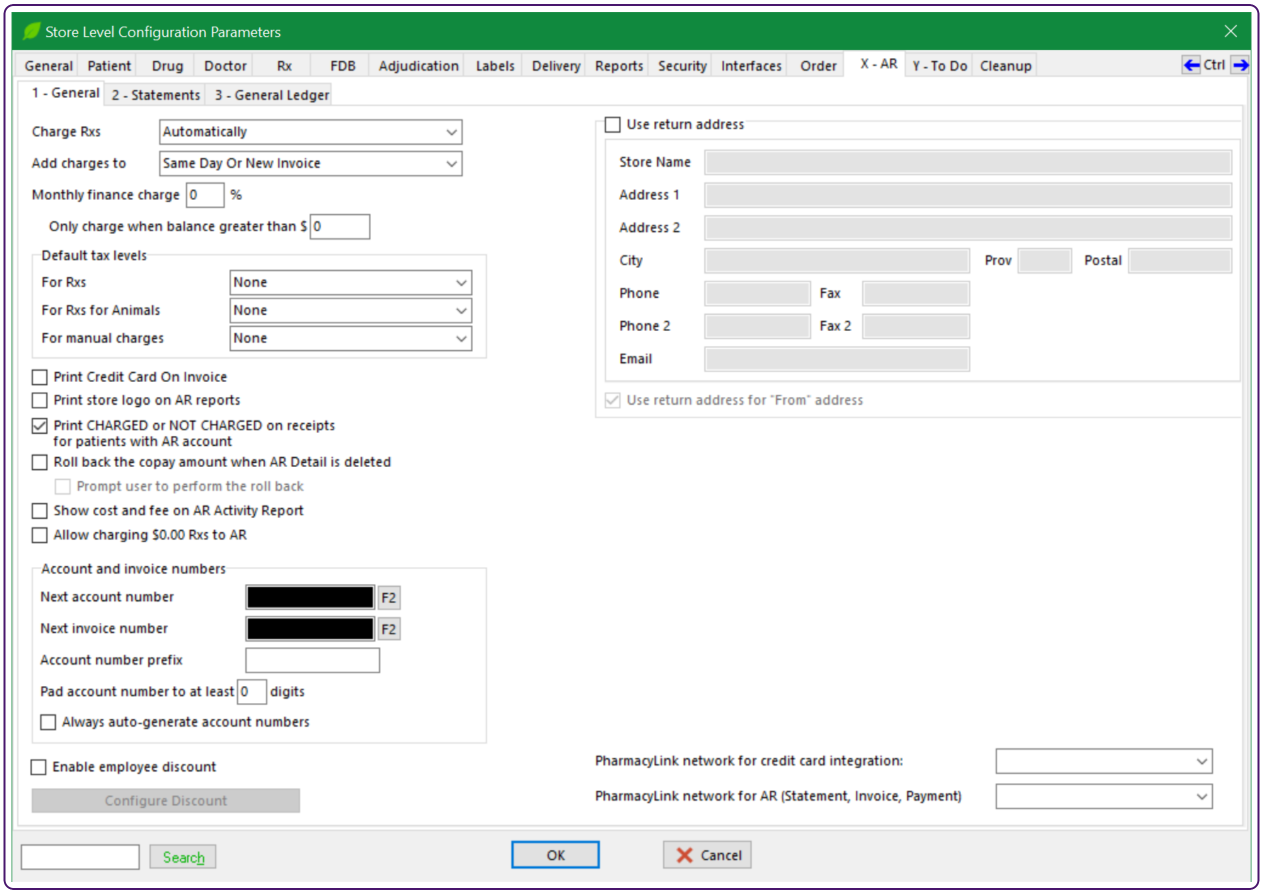
The following table describes the configuration settings on the **Order** tab.

Name	Description
Perform Inventory Adjustment	If selected, inventory tracking is enabled.
Enable automatic drug ordering	If selected, you can use automatic ordering.
Base ordering on, **Base minimum scripts on**	The pharmacy's reorder parameters.
Allow "Base Ordering On" Override at Drug Pack Level	If selected, you can change ordering options at the drug card level.
Auto increment PO numbers	Automatically assigns PO numbers to drug orders.
Allow order grouping	If selected, orders are grouped.
Create order grouping when receiving a substituted item	If selected, all substituted items in an invoice are included in an order group.
Do NOT prompt to link items	If selected, you are not asked whether you want to link catalog items to a drug pack so that the inventory/prices can be updated when the order is received.

Name	Description
Prompt for untransmitted purchase orders when closing Kroll	If selected, if you close Kroll while you have untransmitted purchase orders, you are asked to confirm that you want to exit.
Warn if item order price >= [x]	If an order item exceeds this value, an order reconciliation warning message is displayed.
Warn when ordering from another vendor if item available from primary vendor	If selected, a warning is displayed when you order an item from a secondary vendor that is available from the primary vendor.
Base reorder on the inventory of the primary product	If selected, the primary product is used to determine inventory level when there is an order grouping in place.
Primary vendor and **Secondary vendor**	The primary and secondary order suppliers.
# of days to base average usage calculations on	The number of days used by the average usage calculation.
Show warning if unresolved purchase order greater than [x] days	The system warns if a purchase order has not been received within this number of days (unless the number is 0).
Force inventory adjustment on all drugs	If selected, an inventory adjustment is applied to all drugs.
Next PO number	The next PO number to use for orders.
Allow non-PO receive	If selected, you can receive all products in the system whether or not a PO is linked.
Average drug's acquisition cost upon receiving new inventory	If selected, the drug's acquisition cost is averaged when new inventory is received.
Allow default vendors for specific drug packs	If selected, default vendors can be set for specific drug packs.
For shared DB, order only for current store	If selected, if you use a shared database for multiple stores, orders are only made for the current store.

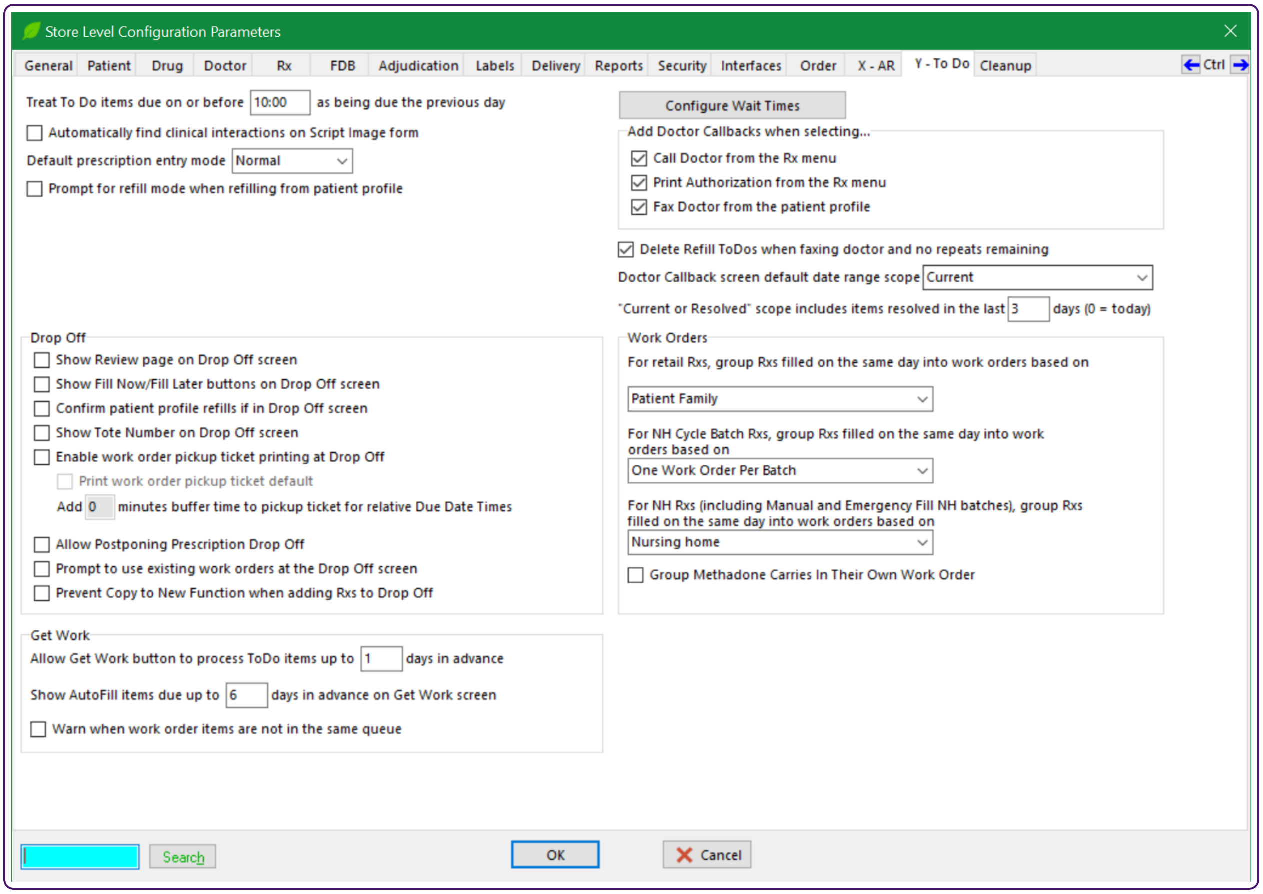
X - AR

The Accounts Receivable (AR) module is enabled from the **Configuration** > **Kroll** > **Configuration** tab. Please contact TELUS Health for helping adjusting these settings.



To Do

The **To Do** tab works in conjunction with the **To Do** tabs on the **Alt-X** window. Please contact TELUS Health prior to changing any of the settings on this window.



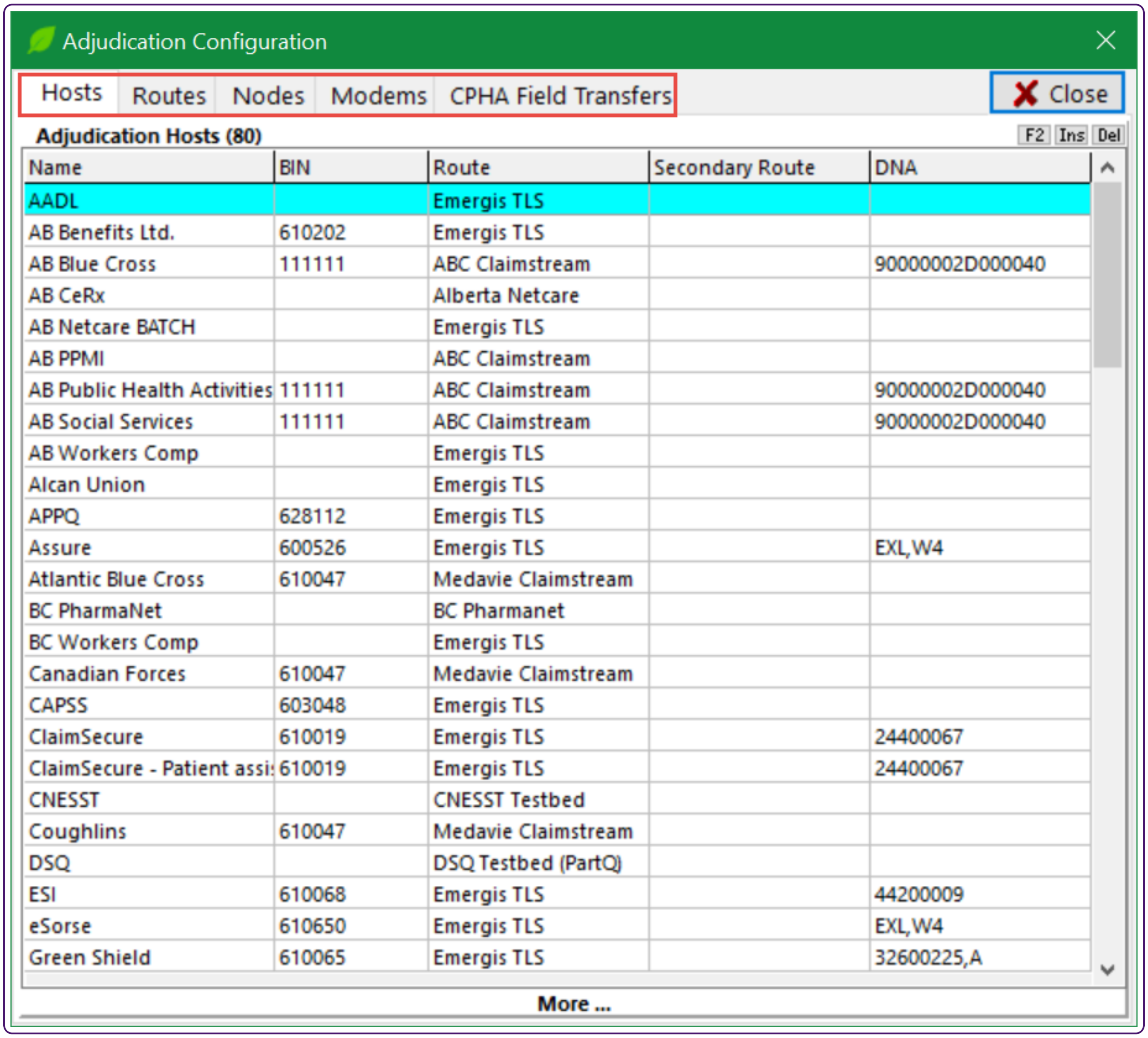
Cleanup

The following table describes the configuration settings on the **Cleanup** tab.

Name	Description
Purge data with no activity in the past [x] years	Data that has not been used in this number of years is removed when a purge is performed.
For patients, also retain data for [x] years after the patient turns [x] years old	The number of years patient data is retained, after the patient reaches the specified age.
Generate Purge Report	If selected, a purge report is generated.
Automatically delete processed inbound documents and faxes after [x] days	The number of days after inbound documents and faxes are processed that they are deleted.

Adjudication configuration

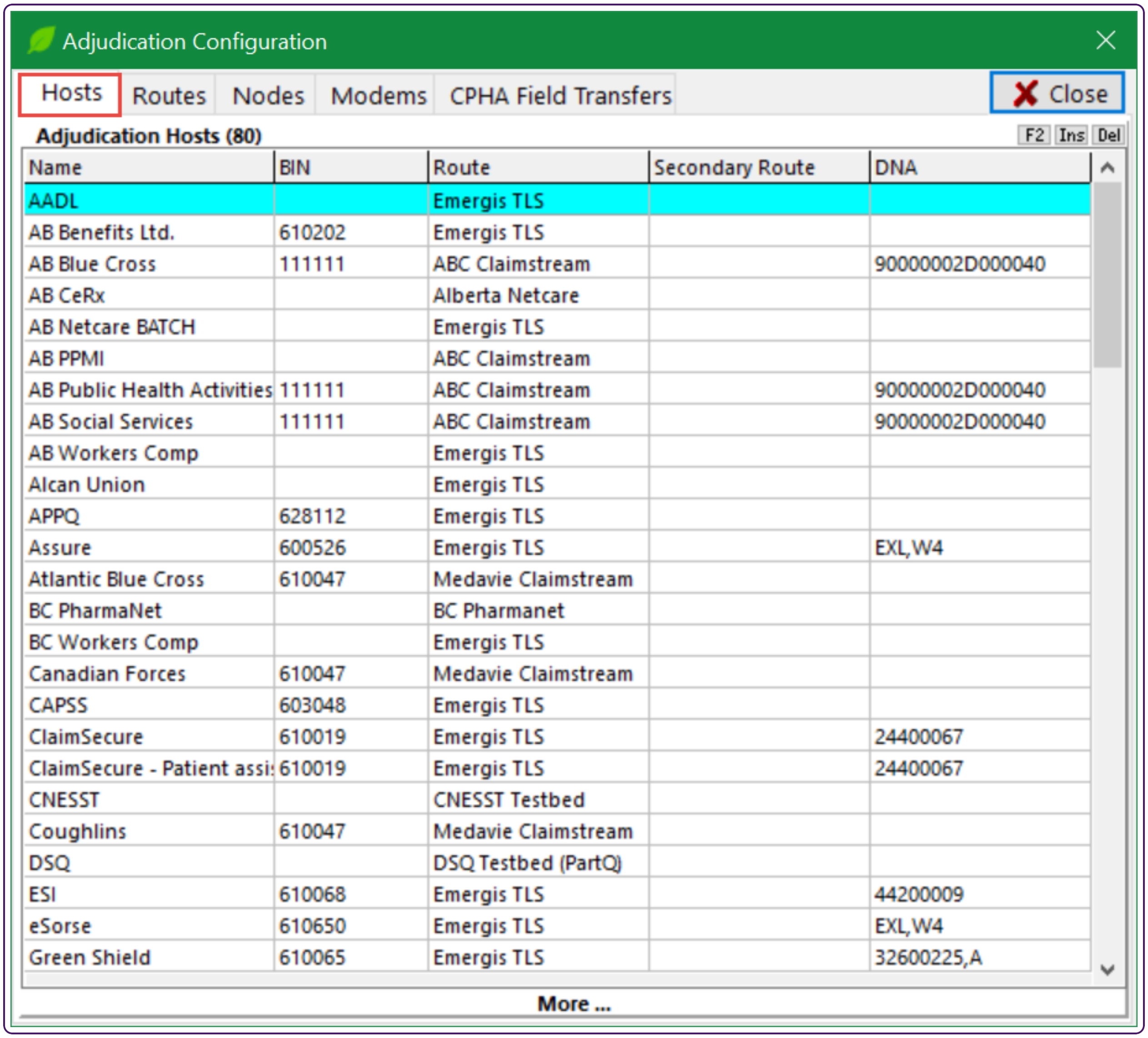
You can use the **Adjudication Configuration** window to configure how data is transmitted to third party insurance providers. The five tabs across the top of the window allow you to configure different parts of the adjudication process.



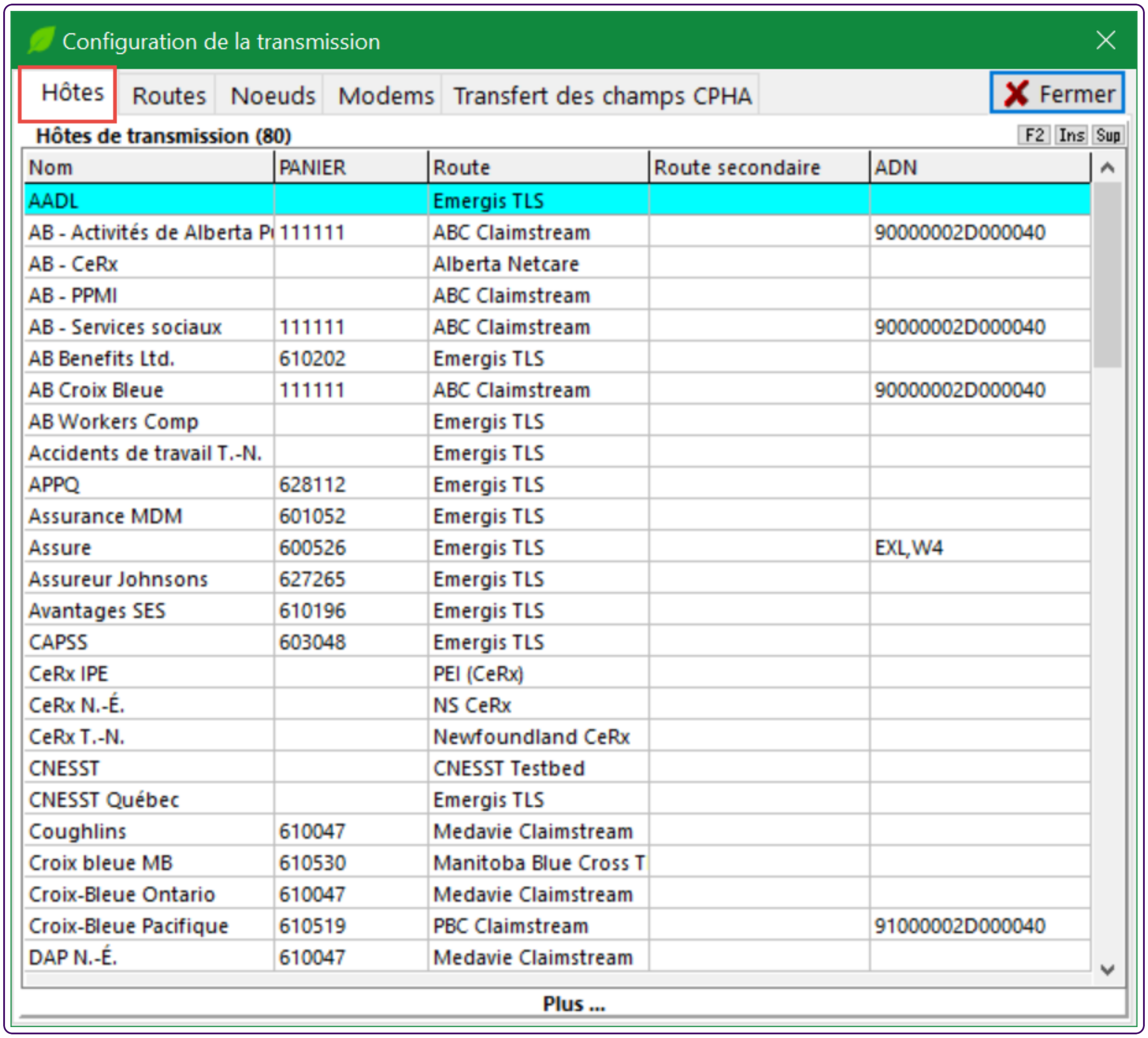
Name	BIN	Route	Secondary Route	DNA
AADL		Emergis TLS		
AB Benefits Ltd.	610202	Emergis TLS		
AB Blue Cross	111111	ABC Claimstream		90000002D000040
AB CeRx		Alberta Netcare		
AB Netcare BATCH		Emergis TLS		
AB PPMI		ABC Claimstream		
AB Public Health Activities	111111	ABC Claimstream		90000002D000040
AB Social Services	111111	ABC Claimstream		90000002D000040
AB Workers Comp		Emergis TLS		
Alcan Union		Emergis TLS		
APPQ	628112	Emergis TLS		
Assure	600526	Emergis TLS		EXL,W4
Atlantic Blue Cross	610047	Medavie Claimstream		
BC PharmaNet		BC Pharmanet		
BC Workers Comp		Emergis TLS		
Canadian Forces	610047	Medavie Claimstream		
CAPSS	603048	Emergis TLS		
ClaimSecure	610019	Emergis TLS		24400067
ClaimSecure - Patient assi	610019	Emergis TLS		24400067
CNESST		CNESST Testbed		
Coughlins	610047	Medavie Claimstream		
DSQ		DSQ Testbed (PartQ)		
ESI	610068	Emergis TLS		44200009
eSorse	610650	Emergis TLS		EXL,W4
Green Shield	610065	Emergis TLS		32600225,A

Hosts tab

The **Hosts** tab displays a list of providers and the routes used for communicating with them.



Name	BIN	Route	Secondary Route	DNA
AADL		Emergis TLS		
AB Benefits Ltd.	610202	Emergis TLS		
AB Blue Cross	111111	ABC Claimstream		90000002D000040
AB CeRx		Alberta Netcare		
AB Netcare BATCH		Emergis TLS		
AB PPMI		ABC Claimstream		
AB Public Health Activities	111111	ABC Claimstream		90000002D000040
AB Social Services	111111	ABC Claimstream		90000002D000040
AB Workers Comp		Emergis TLS		
Alcan Union		Emergis TLS		
APPQ	628112	Emergis TLS		
Assure	600526	Emergis TLS		EXL,W4
Atlantic Blue Cross	610047	Medavie Claimstream		
BC PharmaNet		BC Pharmanet		
BC Workers Comp		Emergis TLS		
Canadian Forces	610047	Medavie Claimstream		
CAPSS	603048	Emergis TLS		
ClaimSecure	610019	Emergis TLS		24400067
ClaimSecure - Patient assi	610019	Emergis TLS		24400067
CNESST		CNESST Testbed		
Coughlins	610047	Medavie Claimstream		
DSQ		DSQ Testbed (PartQ)		
ESI	610068	Emergis TLS		44200009
eSorse	610650	Emergis TLS		EXL,W4
Green Shield	610065	Emergis TLS		32600225,A



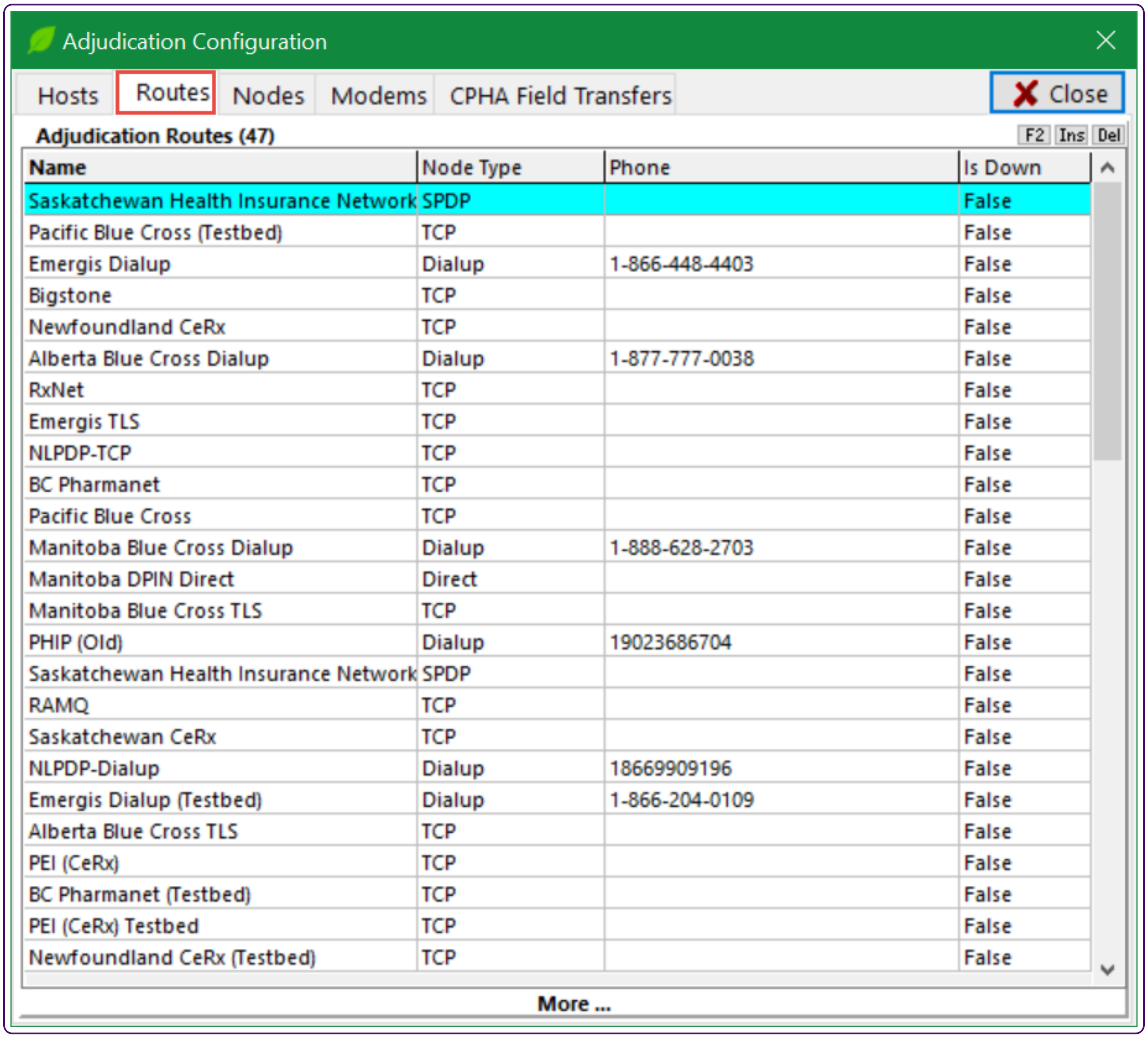
Nom	PANIER	Route	Route secondaire	ADN
AADL		Emergis TLS		
AB - Activités de Alberta P	111111	ABC Claimstream		90000002D000040
AB - CeRx		Alberta Netcare		
AB - PPMI		ABC Claimstream		
AB - Services sociaux	111111	ABC Claimstream		90000002D000040
AB Benefits Ltd.	610202	Emergis TLS		
AB Croix Bleue	111111	ABC Claimstream		90000002D000040
AB Workers Comp		Emergis TLS		
Accidents de travail T.-N.		Emergis TLS		
APPQ	628112	Emergis TLS		
Assurance MDM	601052	Emergis TLS		
Assure	600526	Emergis TLS		EXL,W4
Assureur Johnsons	627265	Emergis TLS		
Avantages SES	610196	Emergis TLS		
CAPSS	603048	Emergis TLS		
CeRx IPE		PEI (CeRx)		
CeRx N.-É.		NS CeRx		
CeRx T.-N.		Newfoundland CeRx		
CNESST		CNESST Testbed		
CNESST Québec		Emergis TLS		
Coughlins	610047	Medavie Claimstream		
Croix bleue MB	610530	Manitoba Blue Cross T		
Croix-Bleue Ontario	610047	Medavie Claimstream		
Croix-Bleue Pacifique	610519	PBC Claimstream		91000002D000040
DAP N.-É.	610047	Medavie Claimstream		

The following table describes the fields on this tab and the popup that is displayed when you enter or edit a host.

Name	Description
Name	The provider.
Route	The adjudication route. Ensure you select the appropriate route for the provider.
Secondary Route	The backup transmission route.
BIN	The identification number that corresponds with the selected adjudication host.
DNA	The adjudication host's DNA value.
Transmit Timeout	The length of time, in seconds, that should pass before the adjudication service reports a transmission has failed because it took too long.

Routes tab

The **Routes** tab shows the configured routes available to communicate with. It displays the name of the route, the type of connection it uses, and the phone number it uses to dial out, if it is configured as a dial-up connection. The **Is Down** column indicates whether you should mark the route as ‘down’ after a failed adjudication attempt, if the connection is not available.



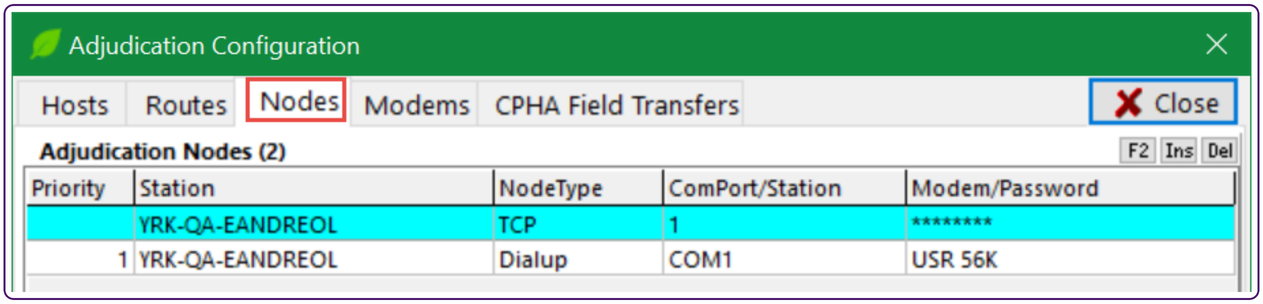
The following table describes the fields on this tab and the popup that is displayed when you enter or edit a route.

Name	Description
Name	The name of the adjudication route.
Node Type	The type of node.

Name	Description
Route Type	The type of route.
Protocol	The protocol. The protocol determines which fields are displayed in the popup.

Nodes tab

The **Nodes** tab shows where each connection type will be routed for communication with third party providers. There are usually only two nodes present, though more can be added. Nodes are usually set to the system the adjudication service is hosted on.

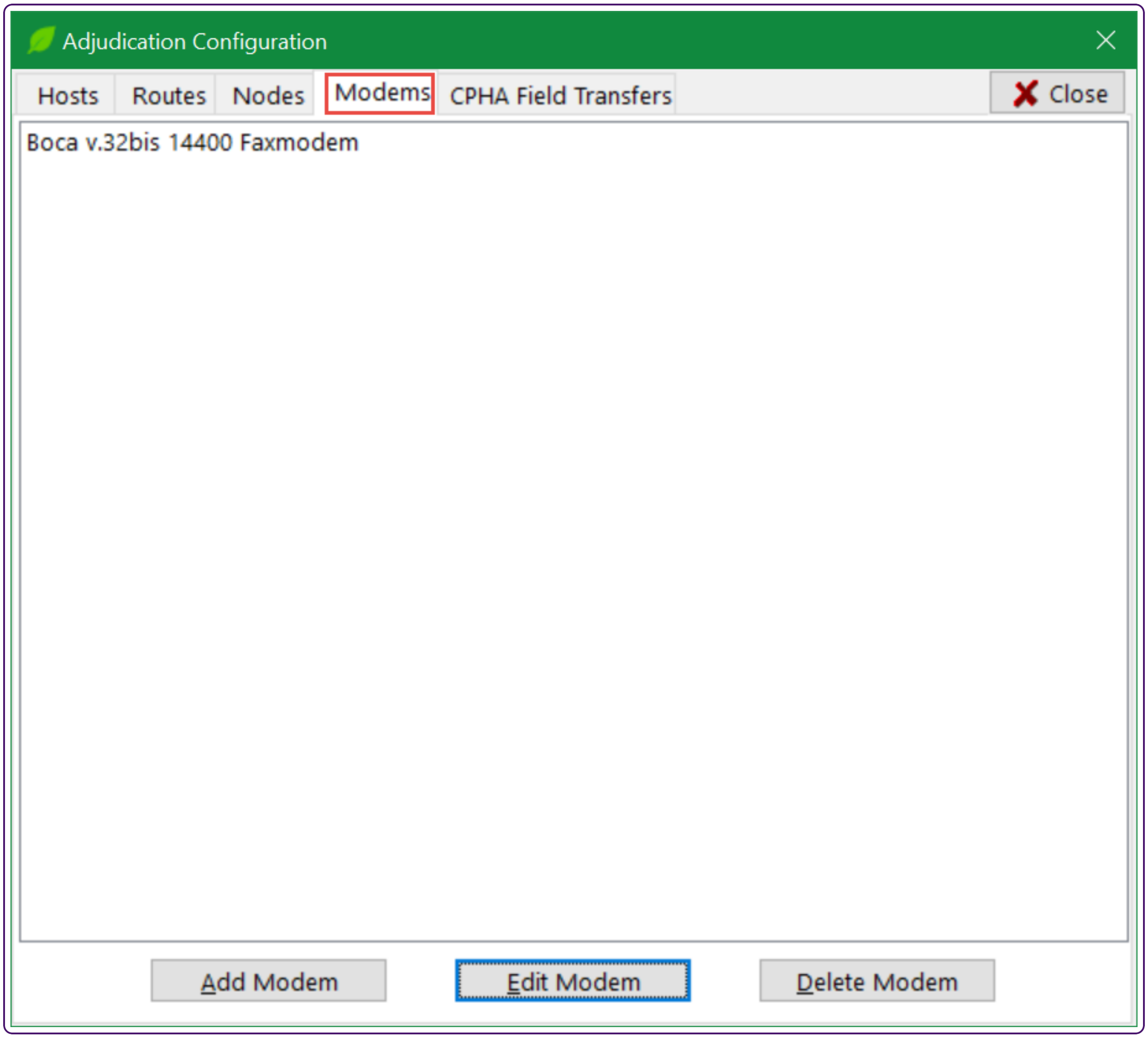


The following table describes the fields on this tab and the popup that is displayed when you enter or edit a node.

Name	Description
Priority	The sequence in which the node is used.
Station	The name of your station.
NodeType	The type of node. The node may determine which fields are displayed in the popup.
ComPort/Station	The communication port or station.
Modem/Password	The modem or password, depending on the type of node.

Modems tab

The **Modems** tab shows a list of all pre-configured modems. Depending on the firmware used by the modem and a number of other factors, some configuration changes may be required.



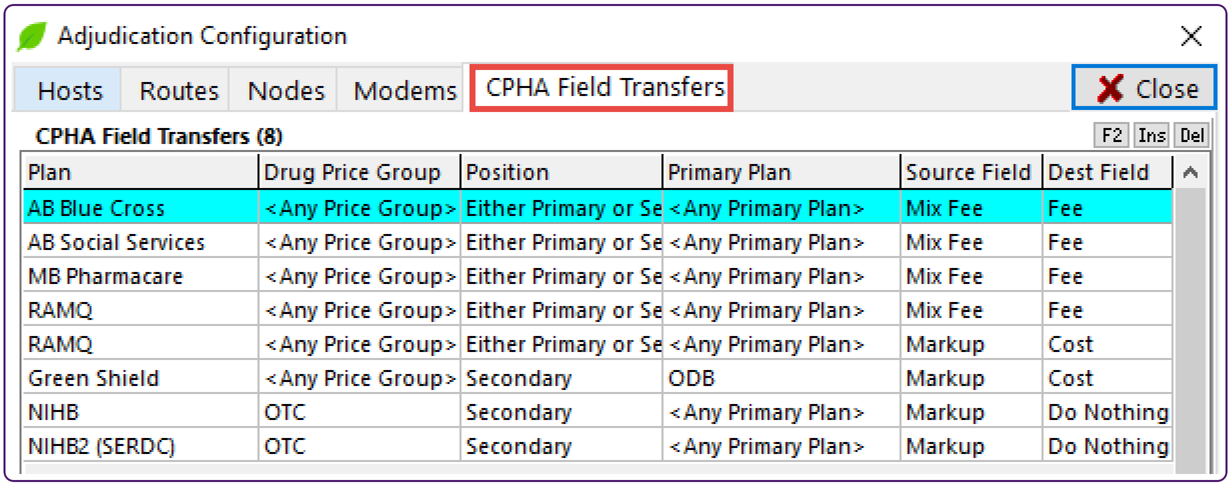
Use the **Add Modem**, **Edit Modem**, and **Delete Modem** to manage the list of modems.

The following table describes the fields on this tab, and the **Modem Edit Form** popup.

Name	Description
Name	The name of the modem.
Config cmd	The modem's unique configuration string. If you do not have this string, refer to a website such as Modem Help or Jay's Page of Modem Inits for assistance.
Hangup Cmd	The command that is used to end the connection on the phone line, thus terminating data transmission. This field is usually set to 'DTR'.

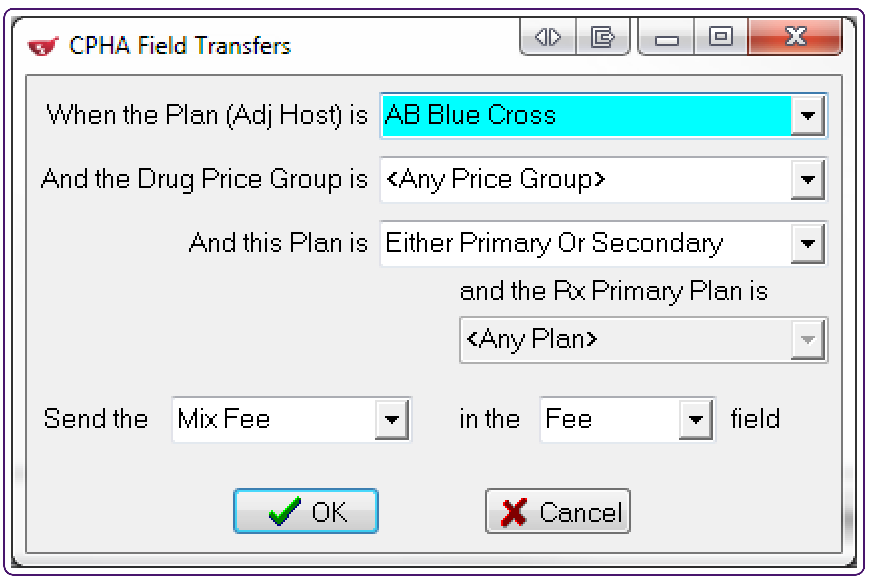
CPHA Field Transfers tab

The **CPHA Field Transfers** tab determines what type of information is sent when an Rx is sent for adjudication, and in which fields.



Select **Ins** or press Insert to add a new field transfer. Existing field transfers can be edited by double-clicking the record or selecting **F2**.

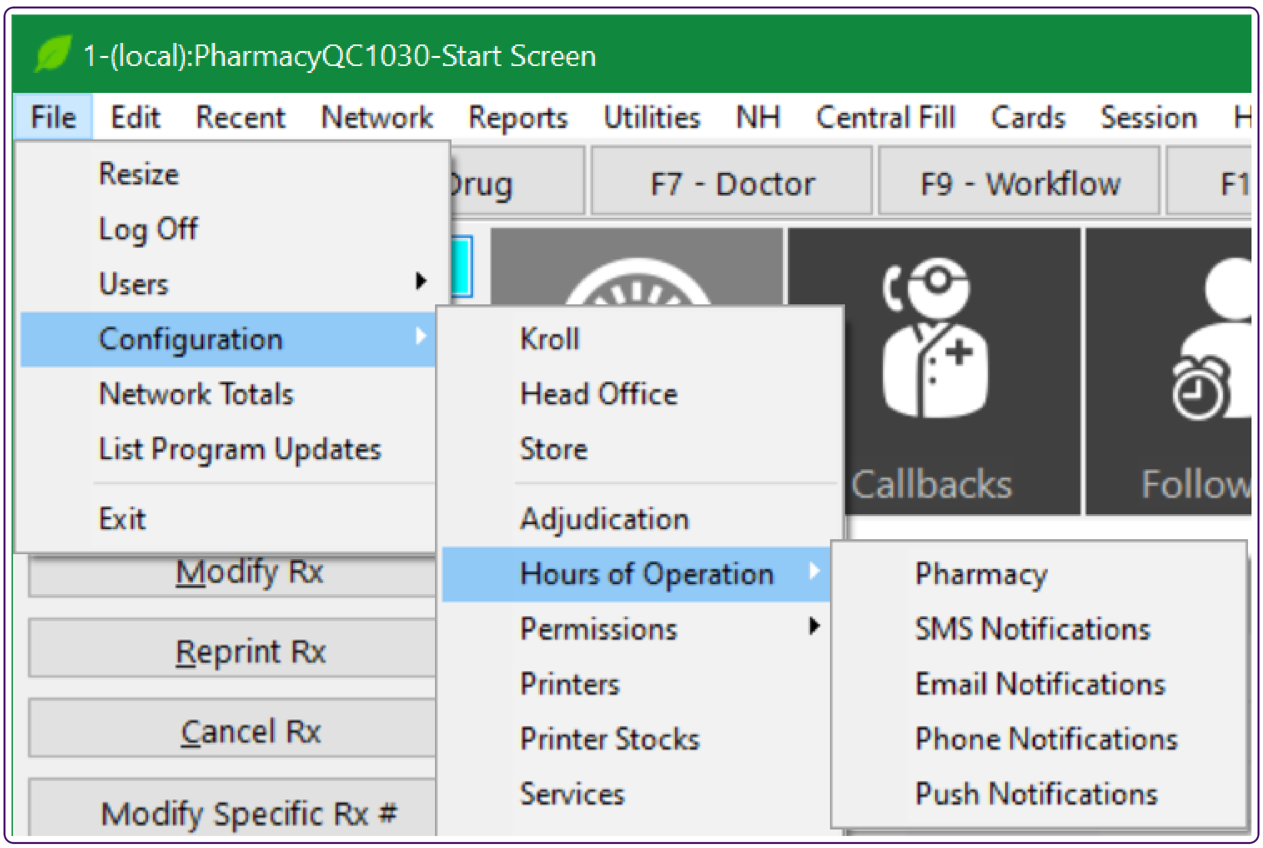
Both actions call up the **CPHA Field Transfers** form where you can enter/edit the field transfer details.



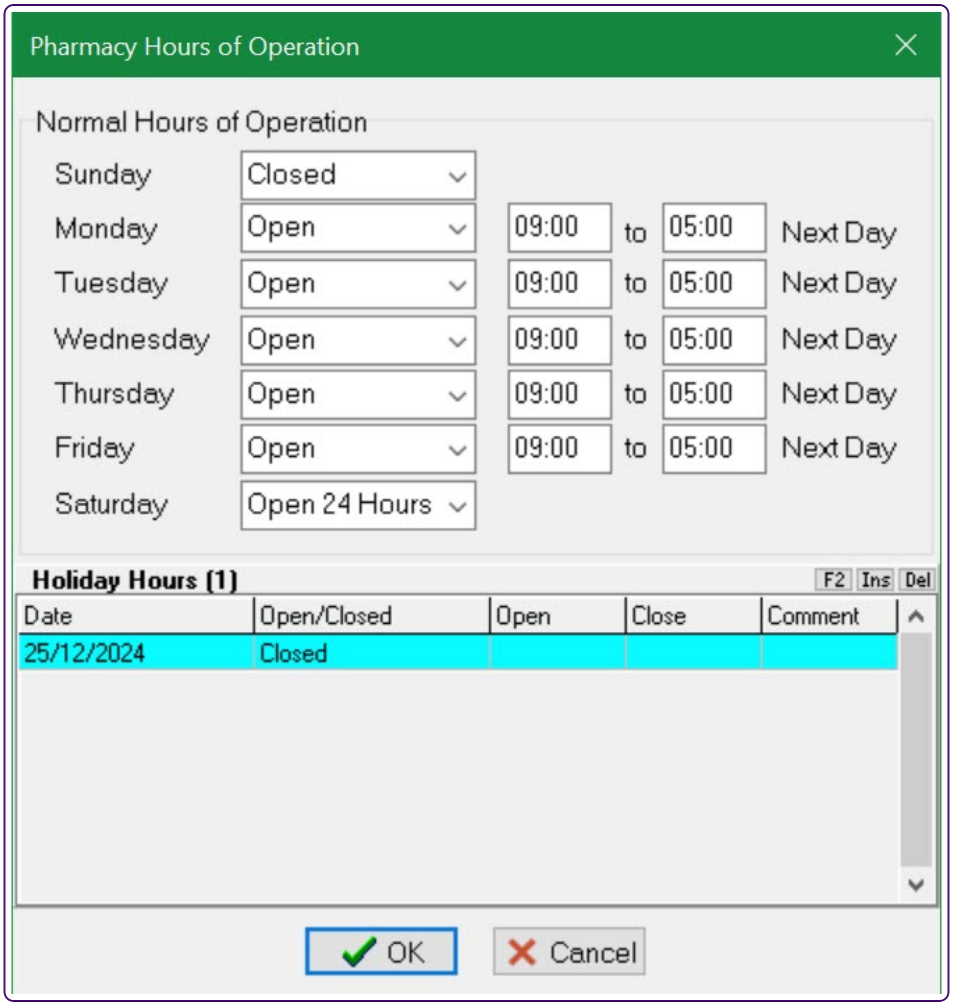
Name	Description
When the Plan (Adj Host) is	The adjudication host to which the field transfer applies.
And the Drug Price Group is	The drug price group that must be used in order for the field transfer to be applied. If you select <Any Price Group>, the field transfer is applied regardless of the selected price group.
And this Plan is	Whether the drug plan must be the primary or secondary plan in order for the field transfer to be applied.
and the Rx Primary Plan is	The Rx primary plan that must be used in order for the field transfer to be applied. This option is only available when **And this Plan is** is set to Secondary.
Send the and **in the** fields	Use these fields to indicate which information should be displayed in which field. Options in the **Send the** drop-down list include Cost, Markup, Fee, and Mix Fee; options in the second drop-down list include Do Nothing, Cost, Markup, Fee, and Mix Fee.

Hours of Operation

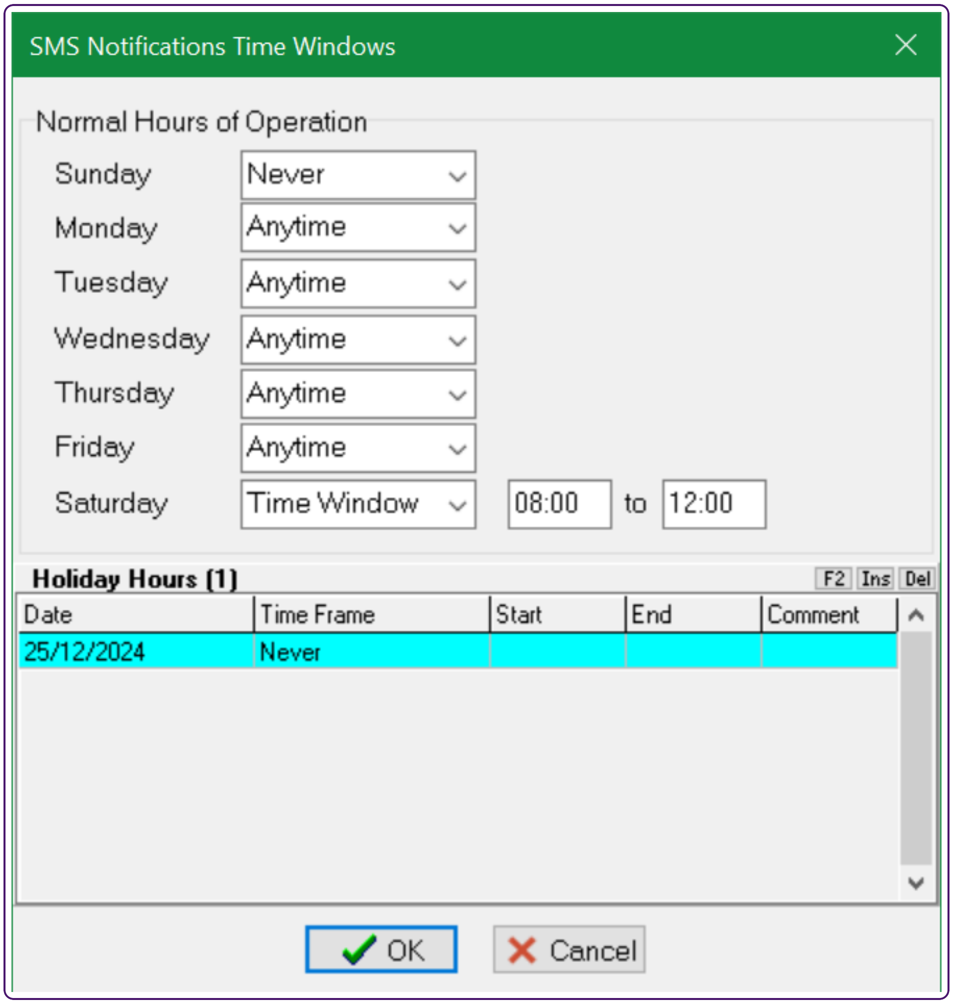
You can set the hours of operation for the pharmacy, as well as the time windows during which SMS, email, phone, and push notifications will be sent.



The **Pharmacy Hours of Operation** popup contains a field for each day, as well as a table to which you can add holidays.



The **SMS**, **Email**, **Phone**, and **Push Notifications Time Windows** popups use the same fields as the **Pharmacy Hours of Operation** popup, although the values of the daily fields differ.



Use the dropdown boxes next to each day to indicate whether and when the pharmacy is open, or whether or when SMS, email, phone, and push notifications can be sent.

Use the **Holiday Hours** section to set holiday hours.

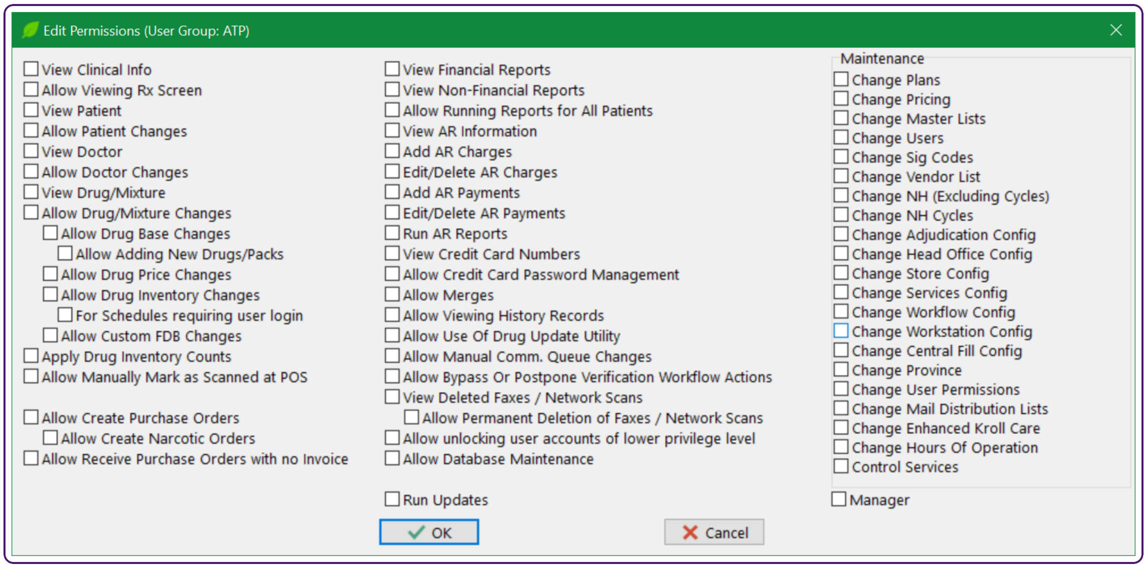
Permissions

You can use the **Permissions** settings to control which areas of the application are accessible and usable by specific user groups. Before you adjust the permissions, ensure you have set up your user groups.

Assigning permissions

1. From the **Alt-X Start** window, select **File** > **Configuration** > **Permissions** and select the applicable user group.

   The **Edit Permissions** window is displayed.



2. Select the actions you want to grant to the selected user group permission.
3. Select **OK**.

Group permissions

The following table describes the permissions you can apply to user groups:

Name	If selected, users in this group can...
View Clinical Info	View all patient-related drug information. If deselected, users cannot view patient allergies and conditions, patient profile, or F12 window. They can access individual drugs and doctors, but not as they pertain to a specific patient.
Allow Viewing Rx Screen	Access the F12 window.
View Patient	Search for and access patient profiles. If deselected, users can refill prescriptions but not fill new prescriptions.
Allow Patient Changes	Update patient profiles.
View Doctor	Search for and access doctor profiles. If deselected, users can refill prescriptions but not fill new prescriptions.
Allow Doctor Changes	Update doctor profiles.

Name	If selected, users in this group can...
View Drug/Mixture	Search for and access drug/mixture profiles. If deselected, the users can refill prescriptions but not fill new prescriptions.
Allow Drug/Mixture Changes	Make changes to drug/mixture profiles.
Allow Drug Bases Changes	Make changes to the base in a mixture. If deselected, users can only change variable drug information such as pricing and on-hand quantities
Allow Adding New Drugs/Packs	Add and copy new drugs into the database. If deselected, users can only add new pack sizes to existing drugs.
Allow Drug Price Changes	Make changes to drug prices.
Allow Drug Inventory Changes	Make changes to the on-hand and min/max/days fields. Users can also enable the **No Inventory Adjustment** and **Disable Automatic Ordering**flags on the F5 window.
For Schedules requiring user login	Make changes to the on-hand and min/max/days fields for schedules requiring user login.
Allow Custom FDB Changes	Make customized FDB changes to counseling messages, Kroll Care, and auxiliary labels.
Apply Drug Inventory Counts	Generate cycle counts.
Allow Manually Mark as Scanned at POS	Manually set the **Scanned at POS Date** if the Rx was picked up by Kroll.
Allow Create Purchase Orders	Generate and send purchase orders.
Allow Create Narcotic Orders	Create narcotic orders.
Allow Receive Purchase Orders with no invoice	Receive purchase orders without invoices.
View Financial Reports	View the financially sensitive reports.
View Non-Financial Reports	View the non-financial reports.

Name	If selected, users in this group can...
Allow Running Reports for All Patients	Run patient reports.
View AR Information	Access the Patient AR Profile window
Add AR Charges	Charge items to patients’ accounts receivable accounts.
Edit/Delete AR Charges	Edit and delete charge items in patients’ accounts receivable accounts.
Add AR Payments	Add payment items to the Payments tab on the patient’s Accounts Receivable profile.
Edit/Delete AR Payments	Edit and delete payment items from the Payments tab on the patient’s Accounts Receivable profile.
Run AR Reports	Access the AR Adjustments Audit and AR Taxes Breakdown reports.
View Credit Card Numbers	View, add, delete, and edit patient credit card entries.
Allow Credit Card Password Management	Access **Utilities** > **Credit Card Password Manager** from the menu.
Allow Merges	Merge duplicate patient, drug, and doctor records.
Allow Viewing History Records	View history records on the patient, drug, and doctor windows.
Allow Use of Drug Update Utility	Update drug configuration and drug fields for multiple drug records at the same time.
Allow Manual Comm. Queue Changes	Manually change the communication queue. This applies only to pharmacies with the Kroll Outbound Call Module (OCM).
Allow Bypass Or Postpone Verification Workflow Actions	Bypass or postpone verification actions in the workflow.
View Deleted Faxes / Network Scans	View deleted inbound/outbound faxes and network scans.

Name	If selected, users in this group can...
Allow Permanent Deletion of Faxes / Network Scans	Permanently delete faxes and network scans.
Allow unlocking user accounts of lower privilege level	Unlock lower-level user accounts.
Allow Database Maintenance	Perform database maintenance tasks.
Run Updates	Perform Kroll updates.

Maintenance permissions

The following table describes the permissions under the **Maintenance** heading on the **Edit Permissions** window.

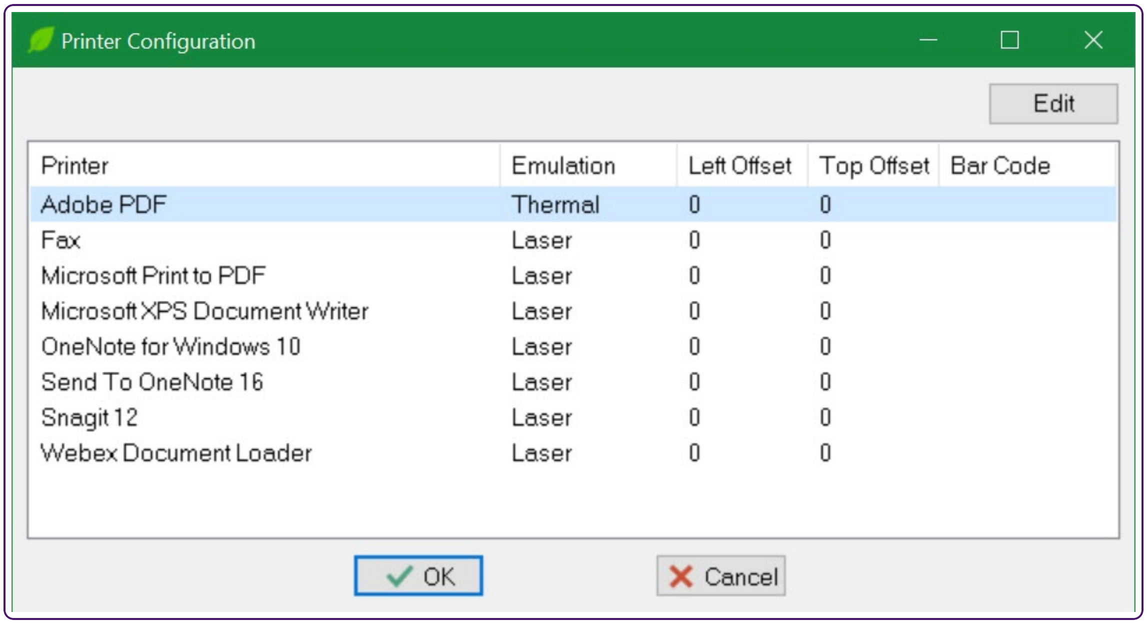
Name	If selected, users in this group can...
Change Plans	Access the **Plans** tab on the Plans/Pricing window.
Change Pricing	Access the Strategies, Strategy Exceptions, Drug Price Groups, Patient Price Groups, and Copay tabs on the Plans/Pricing window.
Change Master Lists	Access the menus in the Master Lists window.
Change Users	Access the Users and Groups window.
Change Sig Codes	Add, edit, and delete Sig codes from the Edit Sig Codes window.
Change Vendor List	Add, edit, and delete vendors in the Edit Vendor List window.
Change NH (Excluding Cycles)	Add, edit, and delete nursing home information from the Edit Nursing Home List window.
Change NH Cycles	Change the nursing home cycles.
Change Adjudication Config	Update the adjudication configuration.
Change Head Office Config	Access the Head Office Level Configuration Parameters window.
Change Store Config	Access the Store-Level Configuration Parameters window.

Name	If selected, users in this group can...
Change Services Config	Access the Services Configuration window.
Change Workflow Config	Access the workflow configuration windows.
Change Workstation Config	Access the Station Configuration window.
Change Central Fill Config	Access the Central Fill parameters window. This option is only available to pharmacies that use the Central Fill module.
Change Province	Change the system’s default province.
Change User Permissions	Access the Edit Permissions windows.
Change Mail Distribution Lists	Change Mail Distribution lists.
Change Enhanced Kroll Care	Change enhanced Kroll Care settings.
Change Hours of Operation	Change the hours of operation.
Control Services	Control Kroll services.
Manager	Signifies that the user is in the Manager group.

Printers

1. From the menu, select **File** > **Configuration** > **Printers**.

   The **Printer Configuration** window appears.

2. Double-click the printer name or highlight the printer name and select **Edit**.

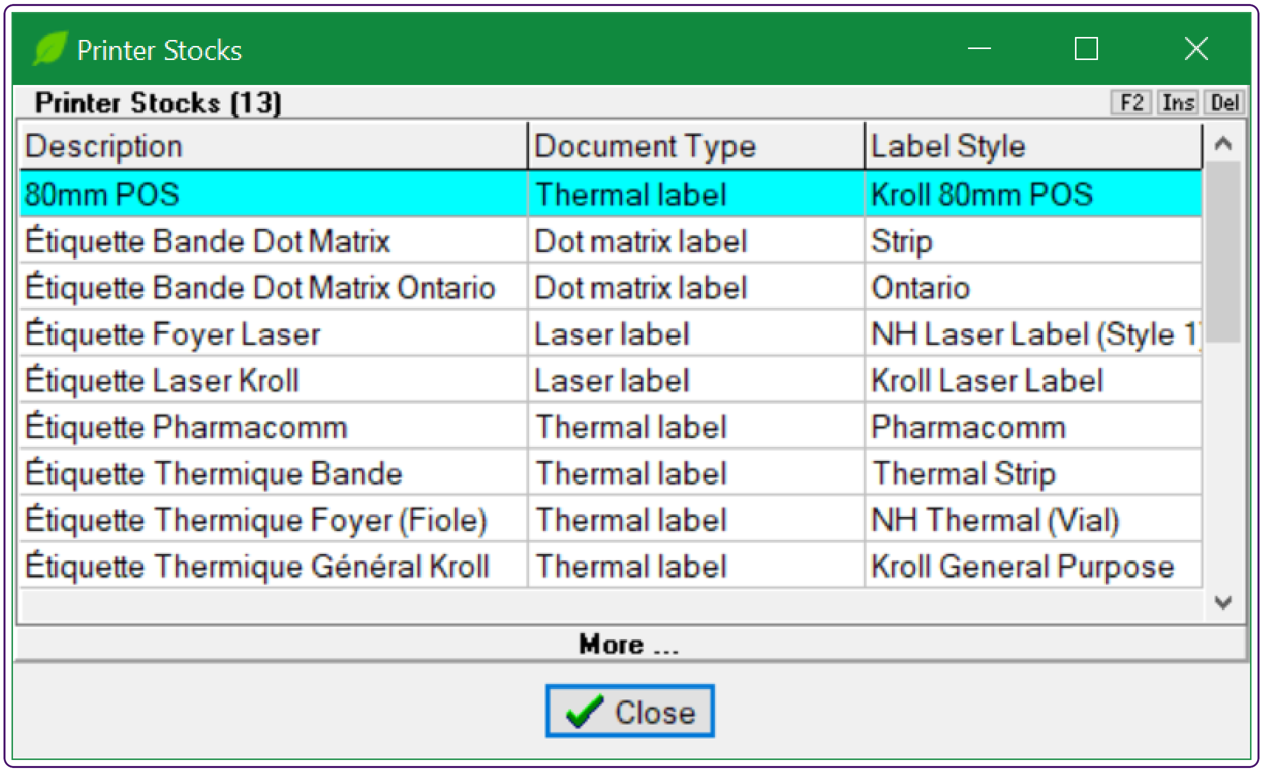
   The **Edit Printer Settings** window is displayed.

The following table describes the printer properties.

Name	Description
Emulation	The appropriate emulation for the printer (e.g., thermal emulation should not be set for a laser printer).
Bar Code	The bar code number used to select a printer when filling an Rx. This enables you to print vial labels using a scanner.
Print watermarks as an image	If selected, watermarks are printed as images.
Label Offsets	The offsets are used to control the label alignment.
Tray	The tray used for prints.

Printer stocks

Printer stocks are configured from the **File** > **Configuration** > **Printer Stocks**> **Edit Printer Stocks**.

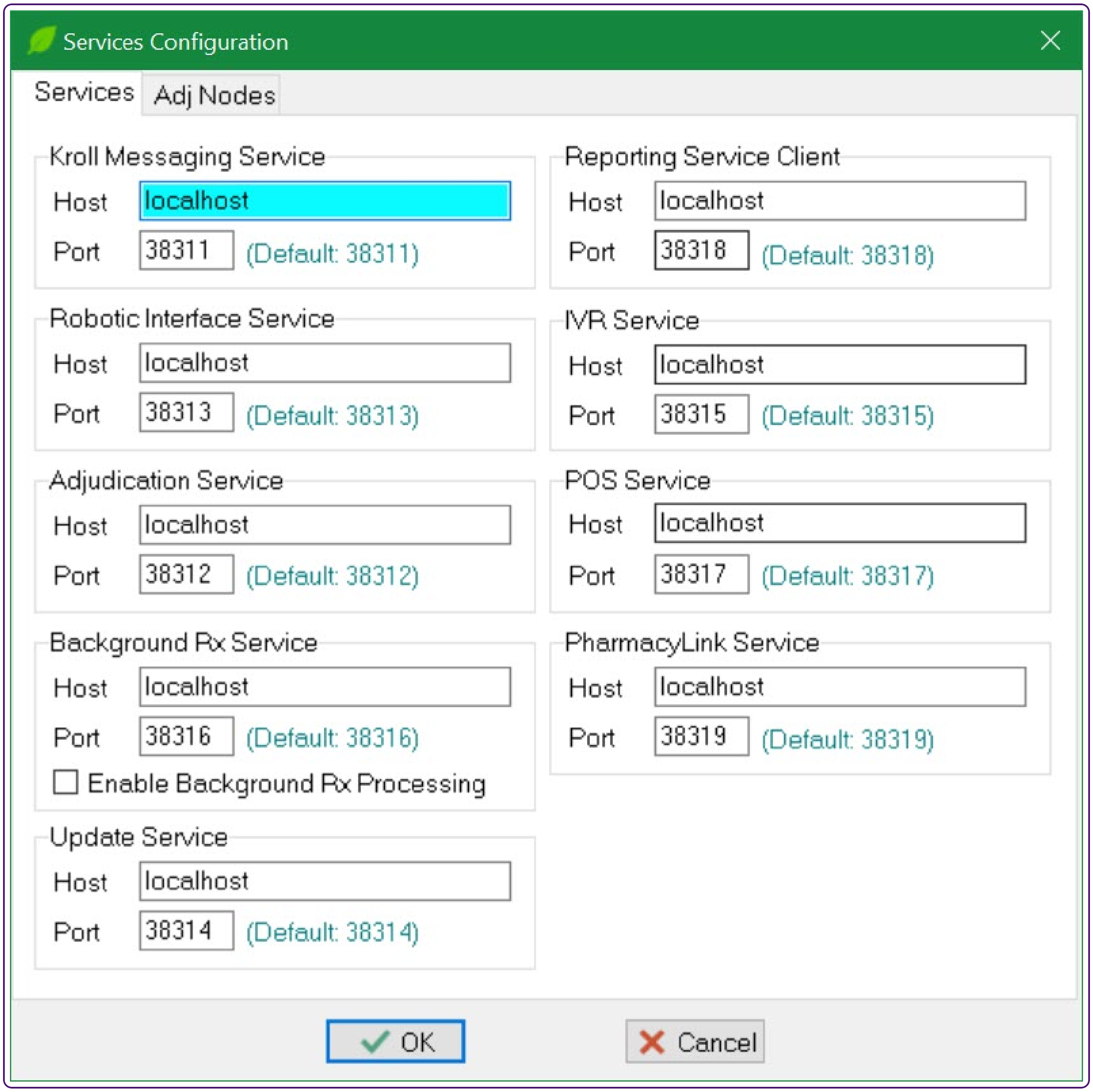


The following table describes the fields on this window.

Name	Description
Description	A descriptive name of the printer stock.
Document Type	The type of document.
Label Style	The style of label. These values vary depending on the **Label Style**.
Warning label for 2D bar code	The warning label used on 2D bar codes.

Services configuration

Services are configured from **File** > **Configuration** > **Services Configuration**.

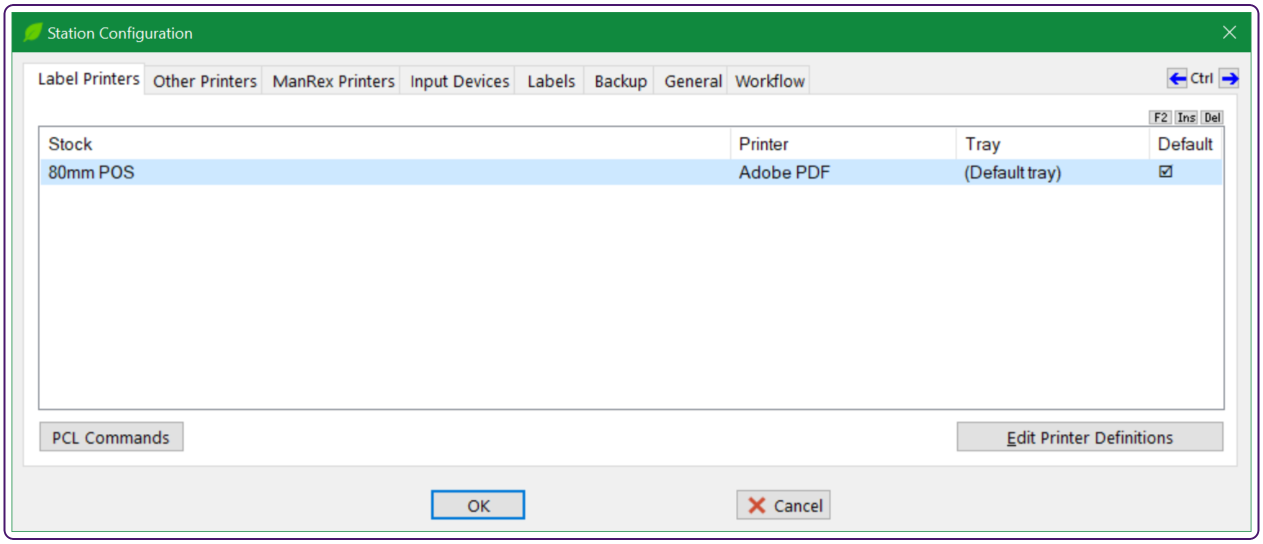


To specify the location of a service, enter the name of the host computer in its **Host** field. You can change the port if the service has been set up to operate on a port that is different from the default ports.

Workstation configuration parameters

This section describes the configuration settings available in **File** > **Configuration** > **Work Station** > **Station Configuration**.

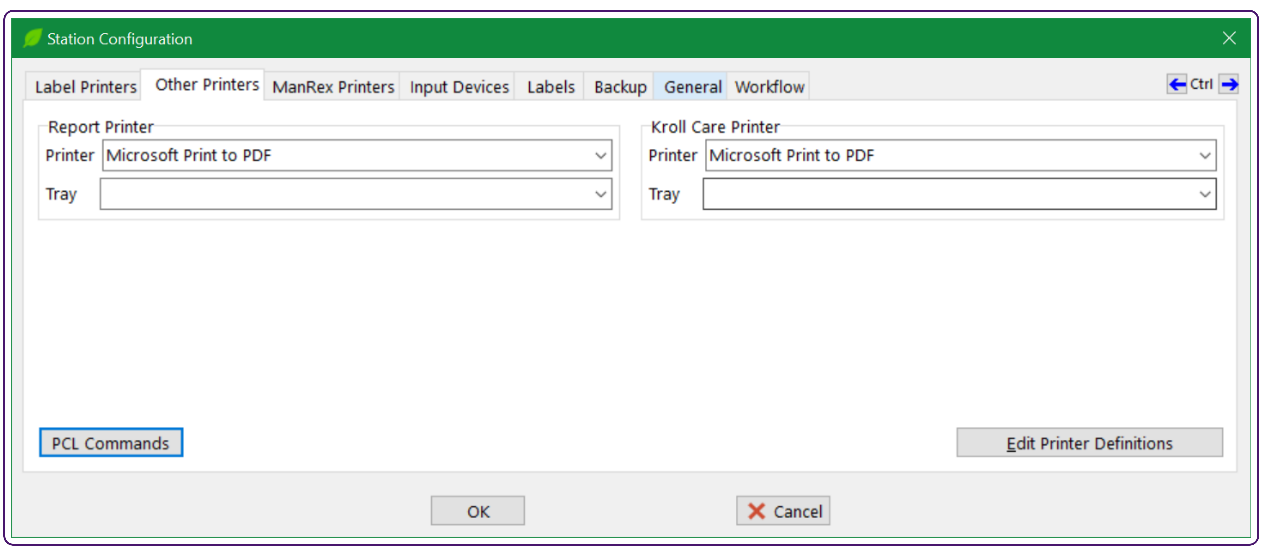
Label Printers



The following table describes the buttons on the bottom of this window.

Name	Use to...
PCL Commands	Set tray options that are sent as RAW PCL commands to the printer.
Edit Printer Definitions	Manage the IE, Laser, Thermal, and Oki Data printer types, and configure custom barcodes that enable scanning from handheld devices for automatic printing. You can also modify the label offsets.

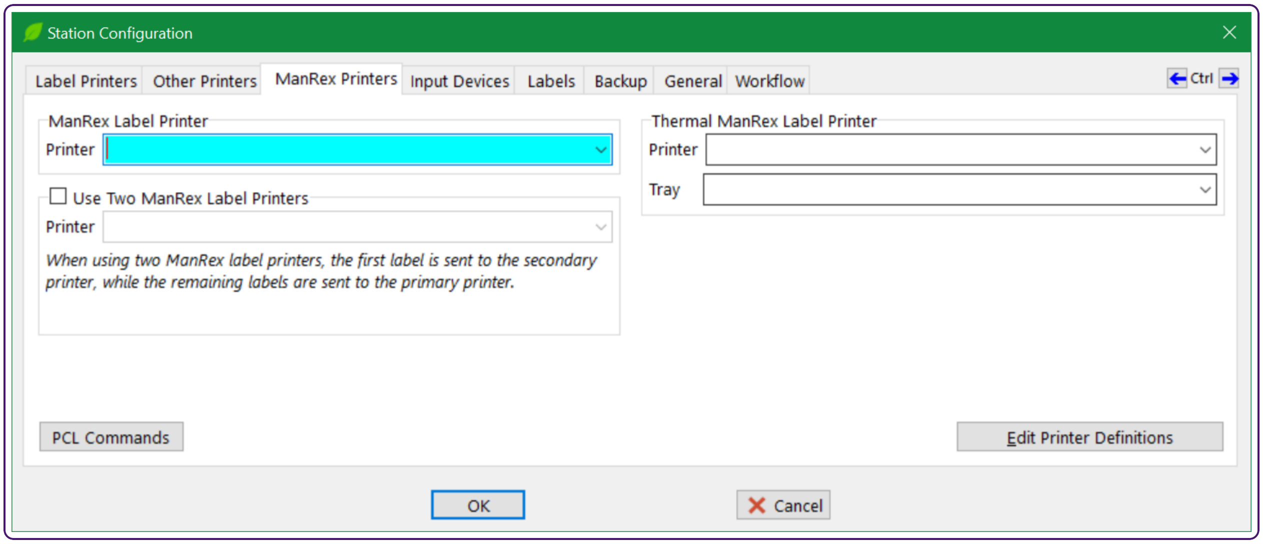
Other printers



The following table describes the sections on this window. For information on the buttons on this window, see "Label Printers" (page 441).

Name	Description
Report Printer	The printer that used for printing reports.
Kroll Care Printer	The printer used for printing Kroll Care leaflets.

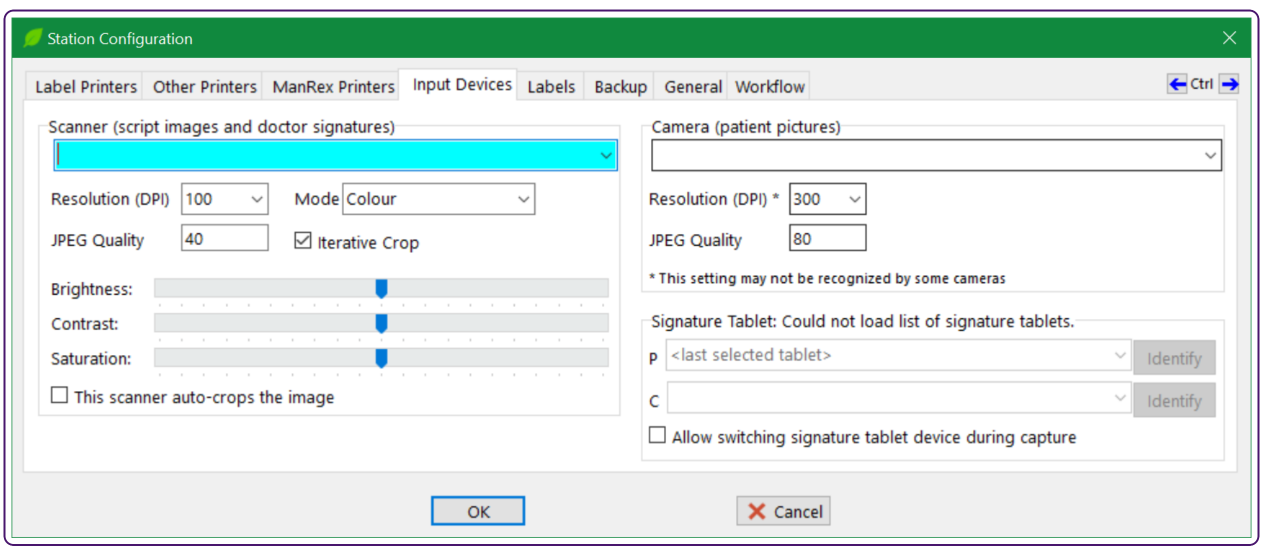
ManRex Printers



The following table describes the sections on this window.

Name	Description
Printer	The names of the printers used for ManRex printing.
Tray	The printer tray to use.
Use Two ManRex Label Printers	If selected, two ManRex printers are used.

Input Devices

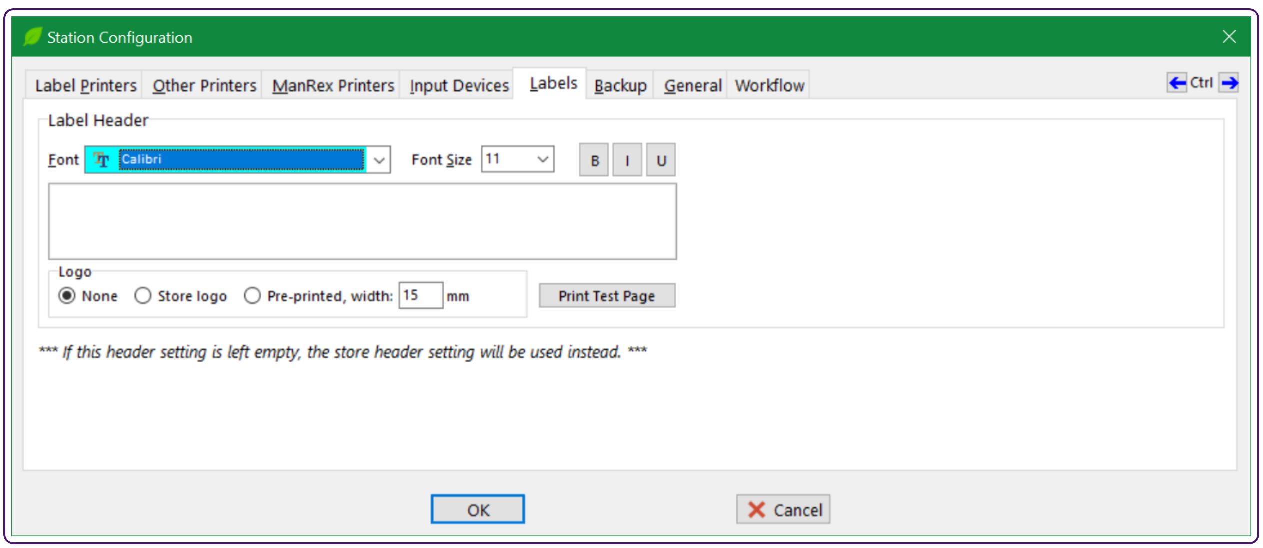


The following table describes the configuration settings on the **Input Devices** tab.

Name	Description
Scanner	The scanner used for importing documents and images.
Resolution	The dots per inch for higher and lower resolution scans. The default is 100DPI.
Mode	Whether documents and images are scanned in grey scale, black and white, or colour. Grey is the default.
JPEG Quality	The percentage the image can be compressed without compromising its quality. For the scanner, the maximum is 50% and the default is 40%. For the camera, the default is 80%.
Iterative Crop	If selected, more precise image cropping is used.
Brightness, **Contrast**, **Saturation**	The lighting, sharpness, and colour intensity of the scanned image.
This Scanner auto-crops the image	If selected, scanned images are auto-cropped after they are imported.
Camera	The camera device.
Resolution DPI	The dots per inch of photos taken by the camera. The default is 300DPI.
Signature Tablet	The signature tablets configured in the Kroll Device Helper, if applicable. When setting this value, select a configured signature tablet and select **Identify**. This ensures you are prompted to sign the electronic signature if patient or pharmacist signatures are required.

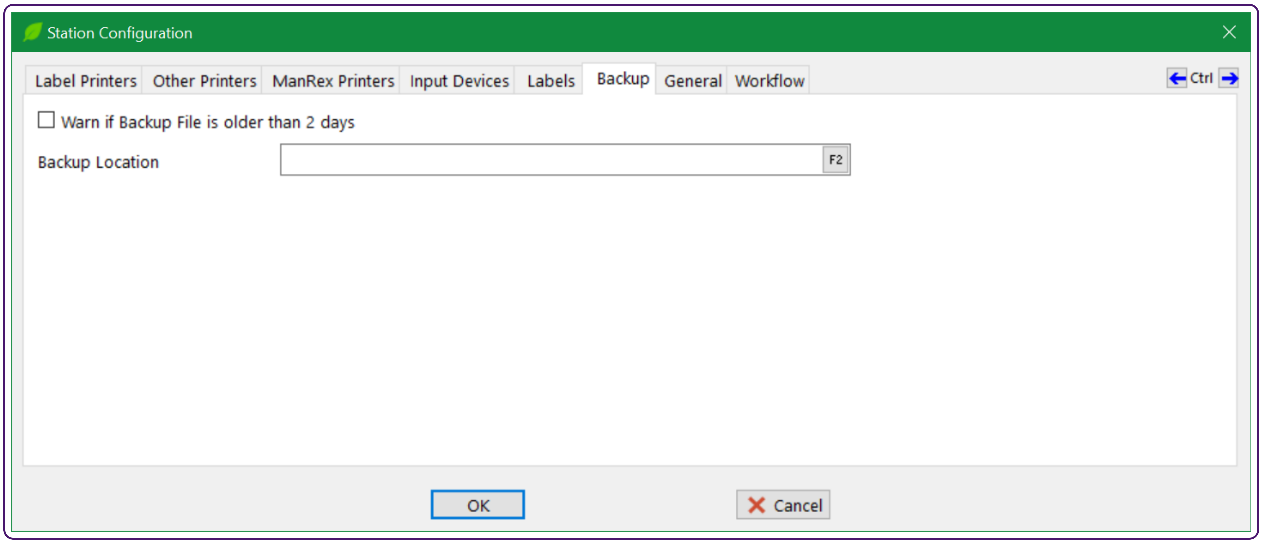
Labels

Use the **Labels** tab to configure a custom label header, to overwrite the label configured in **File** > **Configuration** > **Store**.



1. Use the controls to specify the **Font**, **Font Size**, and make the text bold (B), italic (I), or underlined (U).
2. Select **Print Test Page** to print a test page so you can preview the custom label header.

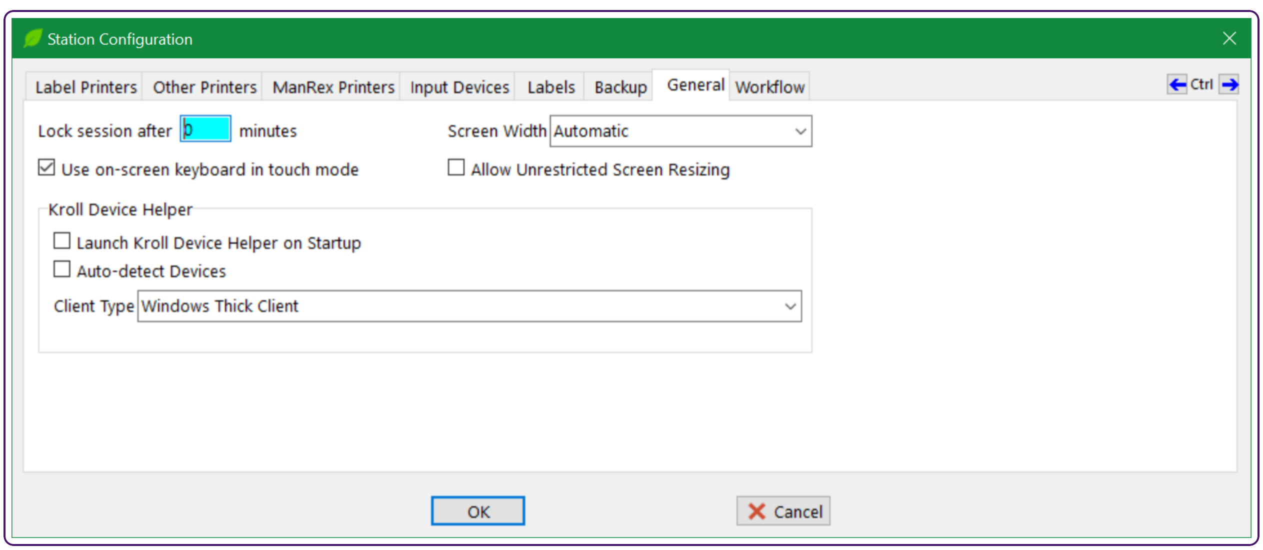
Backup



This following table describes the configuration settings on the **Backup** tab.

Name	Description
Warn if backup file is older than 2 days	If selected, and the configured backup is older than two days, a warning is displayed when you log into Kroll for the first time.
Backup Location	The location where the file will be backed up each day.

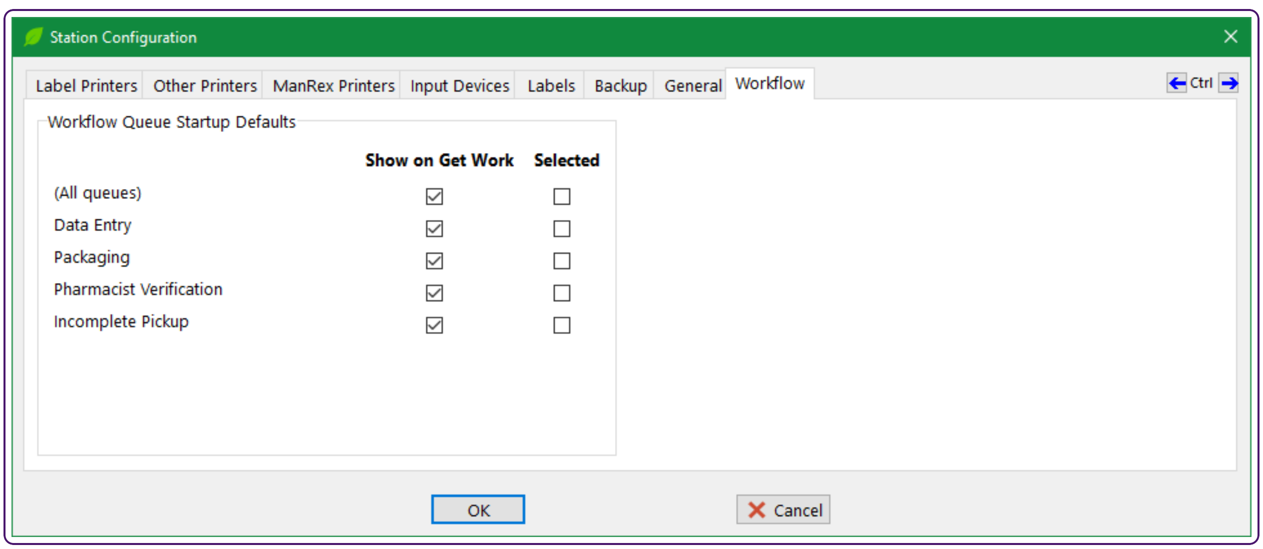
General



This following table describes the configuration settings on the **General** tab.

Name	Description
Lock session after [x] minutes	The number of minutes after which the touch pickup station is locked, if it is inactive.
Use on-window keyboard in touch mode	If selected, you can use the on-window keyboard to input entries. This setting is enabled by default.
Screen Width	The screen width of this workstation.
Allow Unrestricted Screen Resizing	If selected, the screen at the workstation can be resized.
Launch Kroll Device Helper on Startup	If selected, the Kroll Device Helper is automatically launched when Kroll is launched.
Auto-detect Devices	If selected, barcodes are automatically detected on scanners and signature pads.
Client Type	The current environment: ▪ If the user environment is using the device locally, then Windows Thick client should be used. ▪ If you are using an RDP with a Simply Core USB Redirector to redirect the USB device to the RDP environment, then Thin Client (Simply Core USB Redirector) should be used. ▪ If you are using RDP with Fabulatech USB Redirector to redirect the USB device to the RDP environment, then Thin Client (Fabulatech USB Redirector) should be used. ▪ If you are using RDP with Wyse TCX to redirect the USB device to the RDP environment, then Thin Client (Wyse TCX) Redirector should be used.

Workflow



From this tab, select the workflow queues that you want to be available for this workstation when a user selects the **Get Work** button on the **F9 - Workflow** window.

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