



Pharmacy Kroll User Guide

March 2025

Proprietary Notice

Copyright © 2006-2025 TELUS Health Solutions Inc.

All rights reserved. Information provided in this publication is proprietary and confidential. No part of this publication may be distributed, reproduced, stored in a retrieval system, or transmitted, in any form or by any means (electronic, mechanical, recording, or otherwise) without the express written permission of TELUS Health Solutions Inc.

DISCLAIMER

This publication, as well as the software described in it, is furnished under license and may only be used or copied in accordance with the terms of such license. TELUS Health makes no representation or warranties with respect to the contents of this publication, and specifically disclaims any express or limited warranties which may result from misuse of the software and failure to comply with the procedures and/or operating instructions provided herein.

Furthermore, TELUS Health Solutions Inc. reserves the right to make changes to the software and any part of this publication at any time, without obligation to notify any person or entity of such changes.

REVISIONS

The information contained in this publication is subject to change without notice and does not represent a commitment on the part of TELUS Health Solutions Inc. Changes to this publication will be made, as required, to ensure that the contained data reflects the latest configuration of the software, procedures and/or operating instructions. These changes may be the result of design improvements and/or customer requests.

Every effort will be made to inform users of these changes as soon as possible, provided that the changes affect the performance and operation of the software.

Table of Contents

Proprietary Notice	i
Table of Contents	1
Introduction	15
Logging In and out of Kroll	16
Logging in	16
Logging out	17
Users and groups	18
Adding a user	18
Editing a user profile	20
Deleting a user profile	21
Adding a user group	22
Editing a user group	23
Deleting a user group	24
Changing user passwords	24
Pharmacist and assistant association	25
Associating assistants with pharmacists	25
Disassociating assistants from pharmacists	26
Start window	27
Function keys	28
Universal Search Field	28
Menu options	30
Dashboard	30
Dashboard buttons	31
Callbacks	31
Followups	33
Notes	34
Inbound Docs	35
Outbound Fax	36

Mail	36
Table buttons	38
Configuring the columns in search windows	39
Navigating tabs	40
Patient records	41
Searching for a patient	41
Method 1: From the F3 - Patient Search window	41
Method 2: From the Alt - X Start window	43
Method 3: From the F11 - Drop-Off window	43
Performing an Advanced Patient Search	44
Inactive patient records	44
Configuring columns in the Patient Search window	46
Creating a patient record	47
Patient Information tabs	61
General	62
Family	63
Nursing Home	66
Other	69
Copying an existing patient record	69
Patient profile	70
Patient profile views	70
All Rxs	71
Active Rxs	71
Active Rxs with Passtimes	71
Refillable	72
Pricing Profile	72
Not Dispensed/OTC Rxs	72
Rxs Filled In Error	73
Transactions	73
Suspended Rxs	73

Filter Profile Rxs	73
Perform Clinical Analysis	74
Configuring the columns in the Patient Profile	75
Patient Profile commands	78
ESC – Back to patient	78
Space – Mark multiple Rxs	78
F-Refill	78
M-Modify	79
R-Reprint	80
C-Cancel	80
Confirm Cancellation Type	81
Cancel	81
Confirm Cancel and Refill	82
Options	82
D-Detail	82
I-Inactivate	85
Extra Functions	86
View workflow details	86
Counsel	86
Add to Doctor Callbacks	87
Add to Manual NH Batch	87
Add to Rx To Do List	88
AutoFill	89
Create Delivery Order	89
Change Next Fill Parameters	89
Copy to New Num and Make Unfilled	90
Display Therapeutic Equivalents	90
Adapt Rx by Pharmacist	90
Extend Rx by Pharmacist	91
Request Renewal	91

Toggle Batch Fill Status (Hold)	92
Transfer Rx to another store	93
Reactivate Rx	94
Suspend	95
Resume	97
View/Edit Suspends/Resumes	97
Patient profile commands from the F11 - Drop-Off window	98
Patient sidebar functions	100
Alternate Address	101
Appointments	102
AR Profile	103
Authorized Agents	104
Batches	104
Charting	105
Consents	106
Credit Cards	107
Documents	107
ERx Orders	107
History	107
Immunizations	108
Outbound Communications	109
Professional Services	109
Rx Counseling History	109
Rx Notes	110
To Do Items	110
Work Orders	110
Drug records	111
Searching for a Drug	111
Method 1: From the F5 - Drug window	111
Method 2: From the Alt - X Start window	112

Method 3: From the F11 - Drop-Off window	113
Performing an Advanced Drug Search	114
Inactive drug records	114
Creating a new drug record	115
Copying an existing drug record	116
Drug Record fields	117
Drug information tabs	120
General	120
Ordering	122
UPCs	124
Plans	124
Usage	125
Old Costs	126
Counseling	126
Kroll Care	127
Other tab	127
Drug sidebar functions	128
Order Drug	129
Receive Drug	130
Returning to stock	131
Print Kroll Care	131
Alerts	133
Documents	133
Generic Equivalents	133
Modification History	134
Old/New DIN Links	135
Order History	135
Reason Codes	135
Mixture records	136
Searching for a Mixture	136

Method 1: From the F5 - Drug window	136
Method 2: From the F11 - Drop-Off window	137
Performing an advanced mixture search	138
Inactive mixture records	139
Recommended mixture naming conventions	139
Creating a mixture record	140
Inserting Mixture Components	141
Mixture information tabs	143
General	143
Instructions	144
Comments	145
Plan	146
Other	148
Mixture pricing	149
Setting the minimum and maximum mixture fees	150
Setting a flat mixture fee	151
Displaying the mixture breakdown	151
Prescriber records	153
Searching for a prescriber record	153
Method 1: From the F7 - Doctor window	153
Method 2: From the Alt - X Start window	154
Method 3: From the F11 - Drop-Off window	156
Performing an advanced prescriber search	156
Inactive prescriber records	157
Creating a prescriber record	157
Prescriber record fields	158
General Information tab	159
Licenses tab	160
Workflow management	162
Start window	162

Workflow queues (A)	163
Grid (B)	163
Pickup Grid (C)	163
Drop-off	164
Workstations	167
F12 - Fill Rx window	168
Main window	168
Information bar	169
Unit Dose	170
Navigation pane	172
Menu	173
Rx	173
View	175
Labels	176
Profile	177
Reports	177
Tabs	178
Plans	179
Pricing	180
Dates	181
Comments	182
Indications	184
Images	184
Other	185
Warnings	186
Filling a Prescription	187
Patient Details	187
Drug/Mixture Details	189
Prescriber Details	191
Sig Details	192

Dispense details	193
Processing the Rx	195
Prompt for AR	195
Refill Reminder and Auto Refill prompts	195
Pickup notification prompt	195
Prompt for medication reviews	195
Perform Local DUE	196
Allocating inventory	198
Adjudication to Real Time Insurance	198
Adjudication Response window	199
Rejection messages	200
Cost differences	201
Completing the prescription	201
Cycle Counts	202
Pre-select Drugs to Count	203
Scan and go - start counting now	209
Printing the Drug Inventory Count Report	213
Drug orders	214
Creating a drug order	214
Automatic orders (perpetual inventory)	214
Manual orders	216
Method 1: Ordering from the Drug Order Form	216
Ordering from the drug card	218
Min/Max versus days supply ordering	219
Min/Max ordering	220
Days supply ordering	220
Applying min/max ordering to a drug	220
Potential drawbacks of days supply ordering	221
Sending a drug order	221
Resending and ordering	223

Receiving a drug order	225
Checking for invoice files	225
Retrieving invoice files	226
Processing invoice files	226
Processing an invoice	231
New Rxs	234
Drop-off	234
Tracking a work order after drop-off	237
Data Entry	237
F12 window tabs	241
Plans	241
Pricing	241
Dates	242
Comments	243
Indications	245
Images	246
Other	246
Packaging	247
Pharmacist Verification	250
Pickup	251
Refill Rx	253
From the F3 - Patient window	253
From the F11 - Drop-Off window	254
With Rx Number	254
Without Rx Number	255
Unfill Rx (On Hold)	257
Modify Rx	258
Method 1: From the F3 - Patient window	258
Method 2: From the Alt-X Start window	259
Copy Rx	260

From the F3 - Patient window	260
Cancel Rx	262
Method 1: From the F3 - Patient window	262
Method 2: From the Alt-X Start window	263
Inactivate Rx	264
Reactivate Rx	266
Not Dispensed Rx	268
Drop-Off	268
Enter	269
Fee for Service Rx	270
Drop-Off	270
Enter	271
Transfer Rx	273
Transferring an Rx from another store	273
Drop-Off	273
Enter	273
Transferring an Rx to another store	274
Merges	277
Patient merges	277
Drug merges	278
Prescriber merges	280
Patient credit cards	282
Creating a credit card access password	282
Entering patient credit and debit cards	283
Modifying a credit and debit card records	285
Deleting a credit or debit card record	286
Reports	287
Common daily reports	287
Pharmacy End of Day report	287
Network Totals report (Adjudication Totals From Network)	288

Common weekly reports	289
Adjudication Totals report	289
Daily/Monthly Totals report	291
Plan Summary report	293
Other common reports	295
Claims Invoice report	295
Narcotic report	300
Profit/Loss report	302
Medical History report	305
Rx for Drug/Doctor Group Report	308
Drug Inventory Listing report	317
Drug Inventory History report	322
Rx Totals report	326
Price Tree report	332
Sig Code Listing Report	335
Future Usage report	336
Compliance Label report	340
Report discrepancies explained	347
Fill and adjudication dates	347
Reversals and net totals	348
Backdates	348
Claims Invoice report	348
Net amount representation	348
Third party plan imbalances	349
Reconciling	349
Summary	349
Configuration	351
Store- and head office-level configuration	351
General	352
Patient	354

1 - General tab	355
2- Agent tab	358
Drug	359
Doctor	360
Rx	361
General	361
Pricing	365
Prompting	367
Nursing Home	370
Background Rx Filling	370
Workflow	373
Counselling	376
Immunization	378
CeRx	379
Auto-Refill/Reminders	380
FDB	381
Rx tab	382
Drug/Mix and Patient	383
Adjudication	384
General	385
Retail/Nursing Home	387
Labels	388
General	388
Vial	390
Hardcopy	391
Receipt	394
Other Labels	395
Profile/Wallet Card	397
Delivery/Privacy	398
Coupon	399

NH (nursing home)	400
Bar Codes	401
Delivery	402
Reports	404
General	405
Kroll Care	406
Security	407
Interfaces	410
Point of Sale/Robotic	410
Central Fill	411
Outbound Communication	413
Outbound Fax	414
External Interfaces	415
Due Dates	415
VoicePort, RxTouch, and Vigilance	417
AR Payment Import File	418
PointClickCare	418
Order	419
X - AR	421
To Do	421
Cleanup	422
Adjudication configuration	423
Hosts tab	424
Routes tab	426
Nodes tab	427
Modems tab	428
CPHA Field Transfers tab	429
Hours of Operation	430
Permissions	432
Assigning permissions	433

Group permissions	433
Maintenance permissions	436
Printers	438
Printer stocks	439
Services configuration	440
Workstation configuration parameters	440
Label Printers	441
Other printers	441
ManRex Printers	442
Input Devices	442
Labels	443
Backup	444
General	444
Workflow	445

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](#).

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.



Kroll dispensary
Version 10

Initials:

Password:

Login Cancel

Only authorized users are permitted access

 TELUS Health

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.



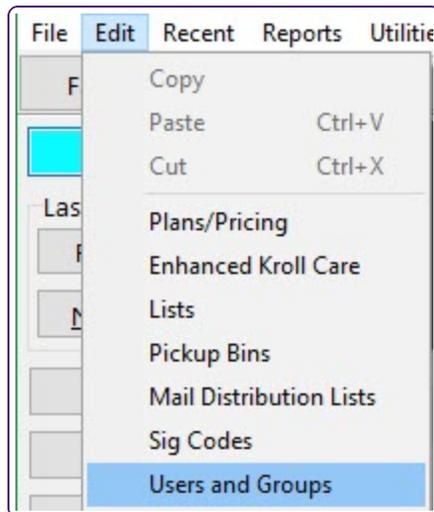
It is not necessary to print the Dayend Label or Network Total for each session; one printout of each report includes all Rx's filled that day.

Users and groups

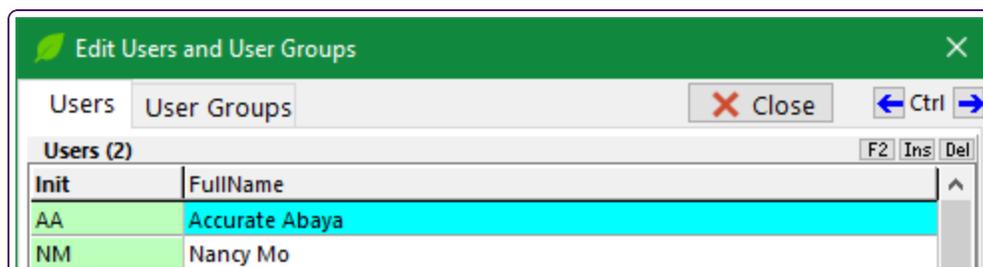
This section explains how to add and manage user accounts so that pharmacy users can access and use Kroll.

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.

The screenshot shows the 'User Information' window. The title bar is green with the text 'User Information' and a close button. The main area is light gray. On the left, there are several input fields: 'Initials' (a blue box), 'First name', 'Last name', 'Disabled' (checkbox), 'Type' (dropdown menu set to 'Licensed Technician'), 'Employee Id', 'Email', 'Password' (with 'Case-sensitive' label), 'Confirm password' (with 'Re-type password for verification' label), 'Expires on', 'Technician ID', 'Technician ID 2', 'Mobile Phone', 'Force password change on next login' (checkbox). Below these is the 'PharmaNet' section with 'Global Pharmanet ID', 'Designation' (dropdown), 'Regulated User' (checkbox), and 'Non-Prescribing' (checkbox). On the right, there is a 'Groups (0)' section with a table header and a list area. At the bottom, there are 'Save' and 'Cancel' buttons.

3. Complete the fields, and add the user to at least one user group.

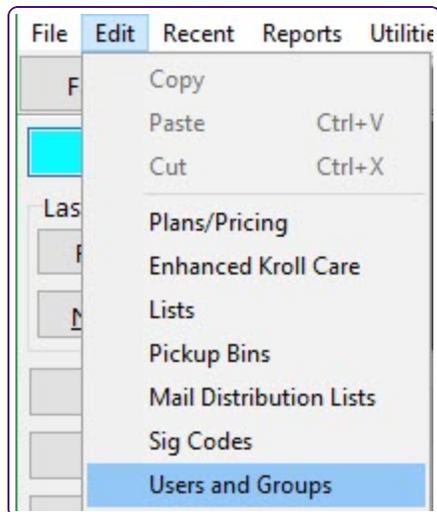
4. Select **Save**.

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.

 A screenshot of the 'User Information' dialog box. It contains several input fields:

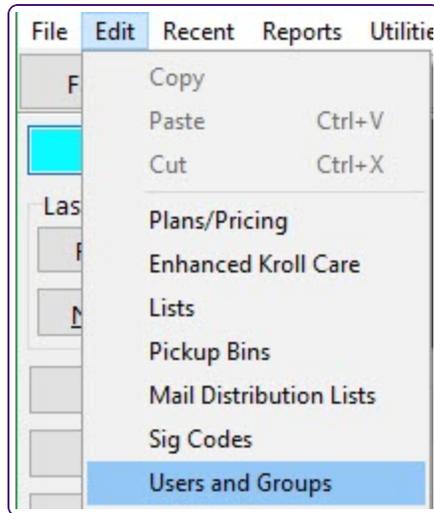
- Initials: AA
- First name: Accurate
- Last name: Abaya
- Disabled:
- Type: Pharmacist (dropdown)
- Employee Id: [empty]
- Email: [empty]
- Password: [masked with dots]
- Confirm password: [masked with dots]
- Force password change on next login:
- PharmaNet Global Pharmanet ID: S@XXAKVP1ABAYA!#123
- Designation: [empty dropdown]
- Regulated User:
- Non-Prescribing:

 On the right, there is a 'Groups (4)' list box containing: Manager, Pharmacist, System Administrator, and Technician. At the bottom are 'Save' and 'Cancel' buttons.

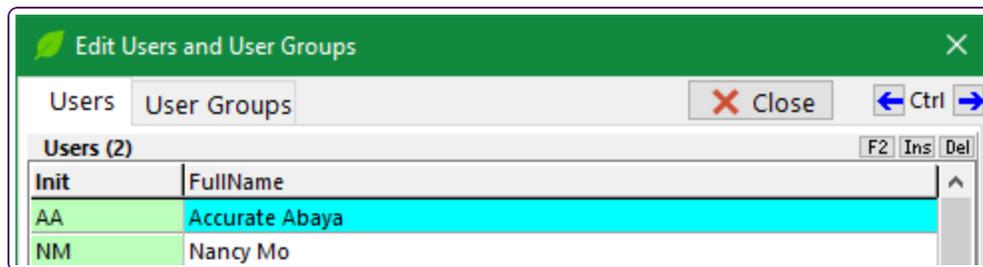
3. Update the necessary information, then select **Save**.

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.

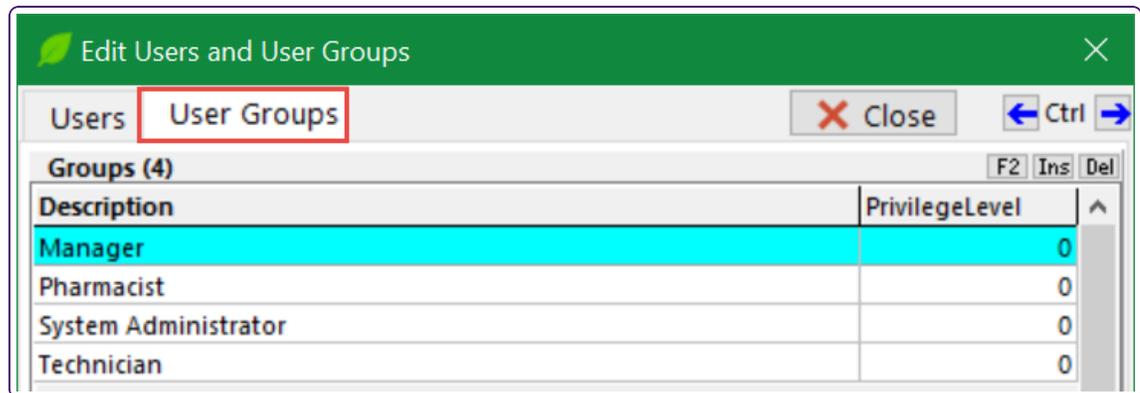


2. Select the user you want to delete, then select **Del**.
A prompt appears, asking if you are sure you want to delete this user.
3. Select **Yes**.

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.



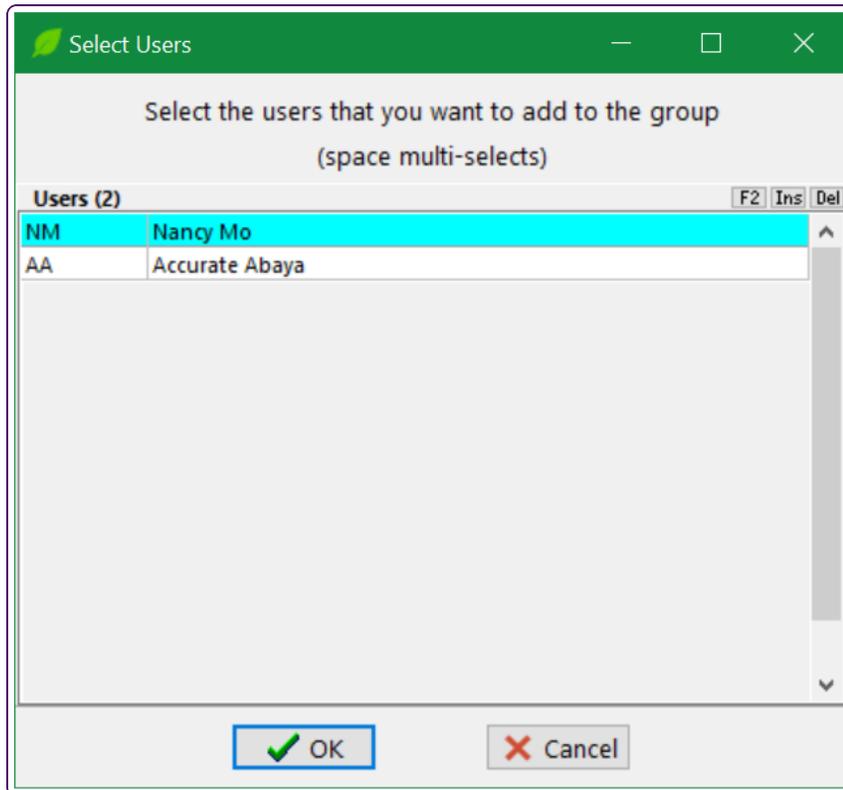
2. Select the **User Groups** tab and select **Ins**.

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

Users (0)	

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

- 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

- From the **Edit Users and User Groups** window, select the **User Groups** tab.
- Select the **User Group** you want to edit, then select F2. The **User Group Edit Form** is displayed.
- Make the necessary changes and select **Save**.

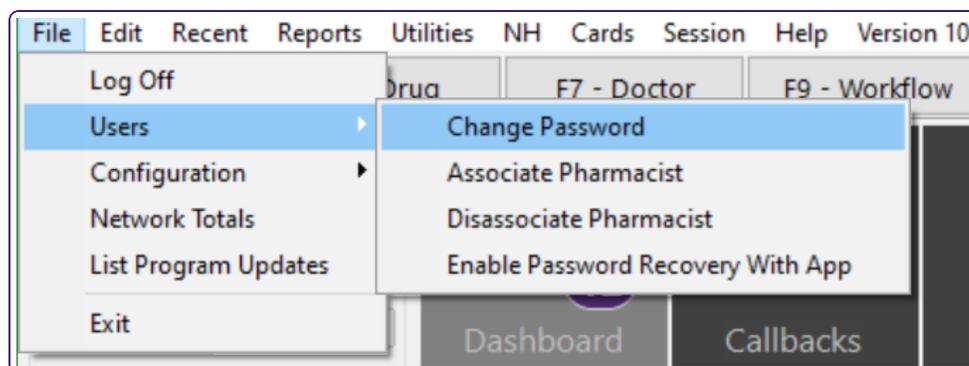
Deleting a user group

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

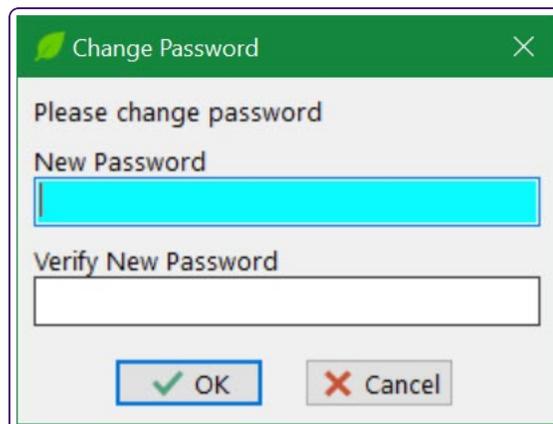
1. From the **Edit Users and User Groups** window, select the **User Groups** tab.
2. Select the user group you want to delete, then select **Del**.
A prompt appears, asking if you are sure you want to delete the user group.
3. Select **Yes**.

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**.

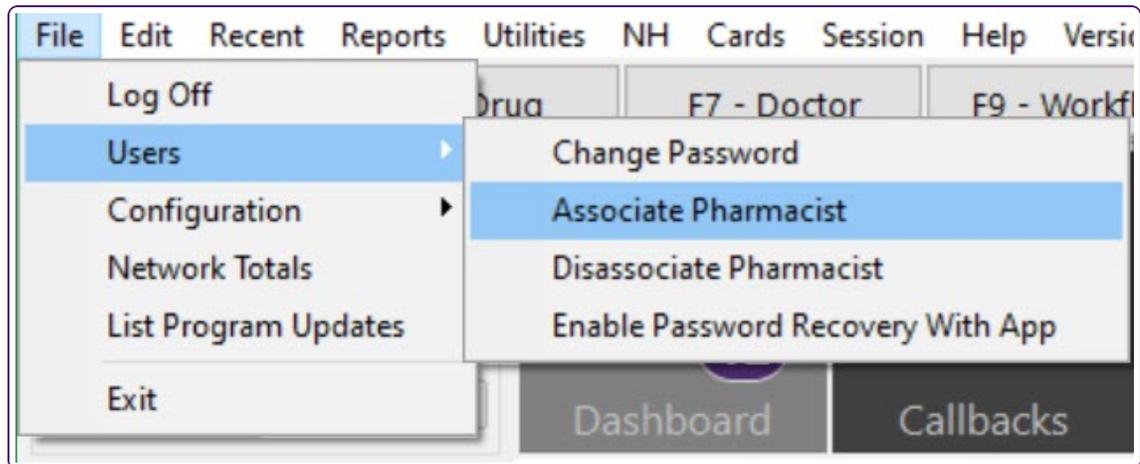
Pharmacist and assistant association

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.

Pharmacist Association Form

This form allows you to associate a pharmacist with several technicians.
Select the technicians that you want to associate with the pharmacist.

Pharmacist Initials

Password

Association Expires today at

Initials	Technician	Pharmacist Inits	Pharmacist	Expires
<input checked="" type="checkbox"/>	PA		Pharmacy Assistant	

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**.

Kroll dispensary
Version 10

Disassociate all technicians from the specified pharmacist

Initials:

Password:

Only authorized users are permitted access

TELUS Health

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.

File Edit Recent Network Reports Utilities NH Central Fill Cards Session Help Version 10

F3 - Patient F5 - Drug F7 - Doctor F9 - Workflow F10 - Pickup F11 - Drop-off F12 - New Rx Alt+X - Start

Last Rx Numbers
 Regular 1000145
 Narcotic 9000001

Dashboard Callbacks 4 Followups 1 Notes Inbound Docs Outbound Fax Mail 1 Calendar FEB 26

Modify Rx
 Reprint Rx
 Cancel Rx
 Modify Specific Rx #
 Reprint Specific Rx #
 Counsel Rx

Rx Work in Progress

	Overdue	0-1 hrs	1-4 hrs	4+ hrs	Tomorrow	Trouble	Total
Data Entry	33	0	0	0	0	0	33
Packaging	16	0	0	0	0	0	16
Pharmacist Verification	1	0	0	0	0	0	1
Incomplete Pickup	0	0	0	0	0	0	0

Rx's Waiting for Pickup

	1-7 days	7-14 days	14-21 days	21-28 days	28+ days	Total	Total \$
Waiting for Pickup	0	1	0	1	7	9	\$154.00

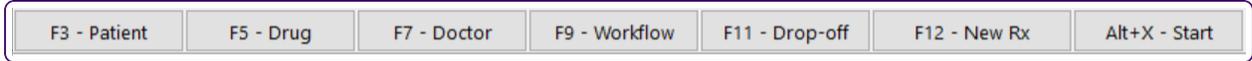
Rx Counts

New	Repeat	Total
0	0	0

TELUS Health

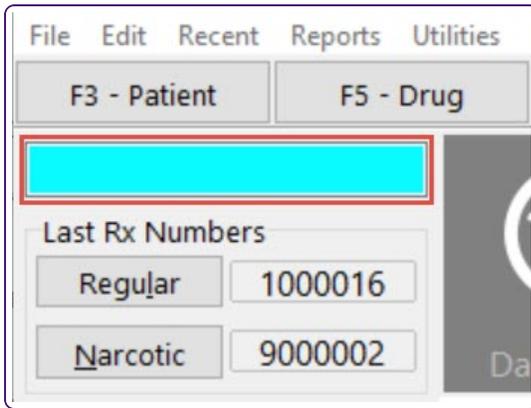
Function keys

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.

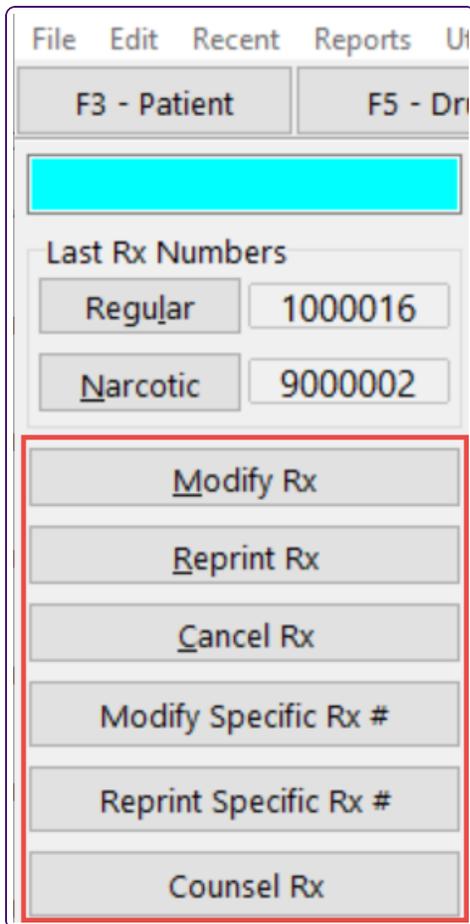


Universal Search Field

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.

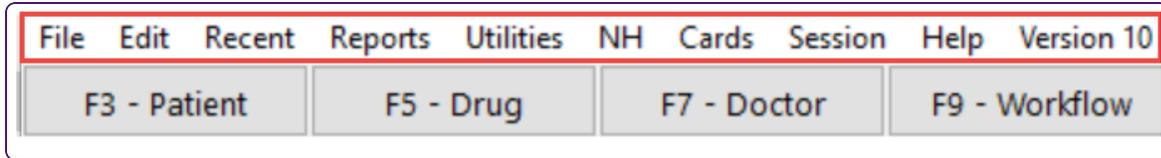


You can also enter a prescription number (Rx) or transaction number (Tx) into the Universal Search Field and choose one of the options from the left navigation pane.

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

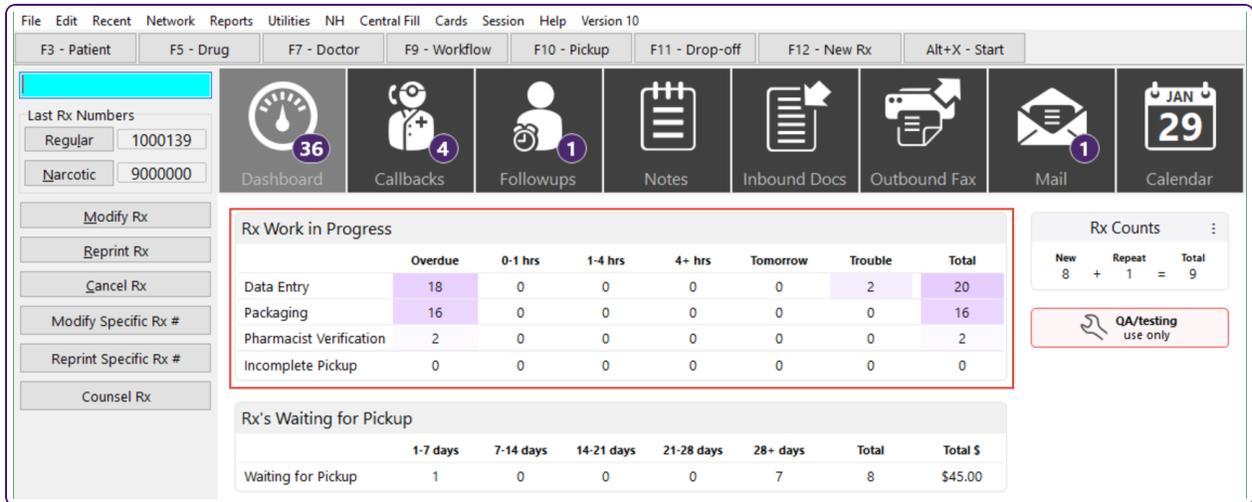
The menu options contain a hierarchy of items you can select.



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 Rx's 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

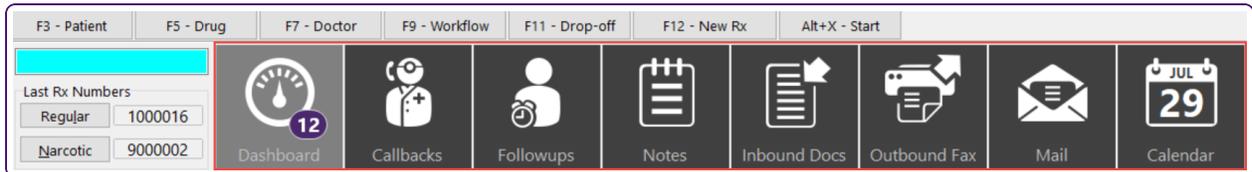
The Dashboard is the default view for the **Alt-X Start** window. It displays prescriptions that are overdue, approaching due time, or in the Trouble queue.



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

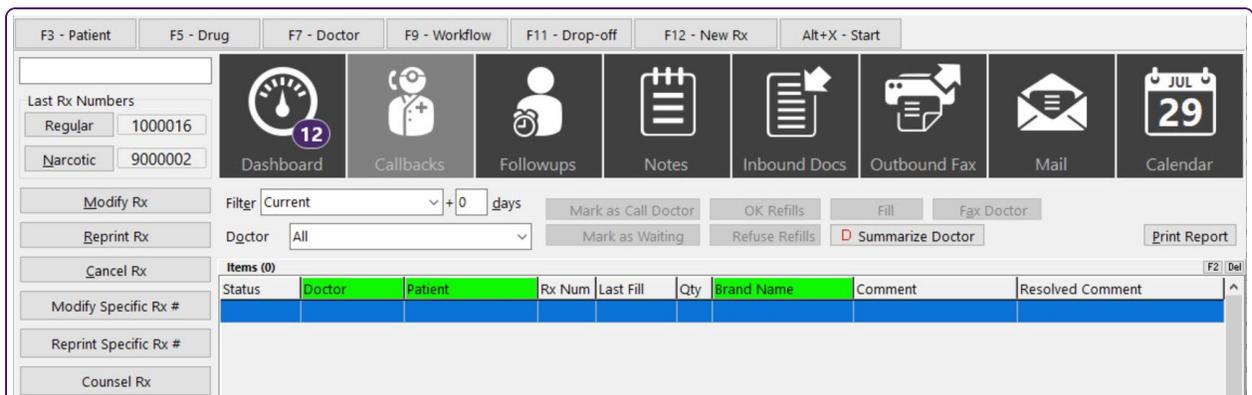
Dashboard buttons

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	<p>Filter the list for callback entries generated during a specific a date range:</p> <ul style="list-style-type: none"> ■ 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)	<p>This option is only available for callback entries with a status of “Doc Okayed”. When this option is selected, the following choices are displayed:</p> <ul style="list-style-type: none"> ■ 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 screenshot displays the TELUS Health software interface. At the top, there is a navigation bar with buttons for F3 - Patient, F5 - Drug, F7 - Doctor, F9 - Workflow, F11 - Drop-off, F12 - New Rx, and Alt+X - Start. Below this is a dashboard with icons for Dashboard (12), Callbacks, Followups, Notes, Inbound Docs, Outbound Fax, Mail, and Calendar. A central area shows a list of follow-up items with columns for Due Date, Status, and Patient. A 'Patient Note' dialog box is open, allowing users to edit follow-up details such as Due Date, recurrence frequency, patient name, and entered/resolved by information.

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.

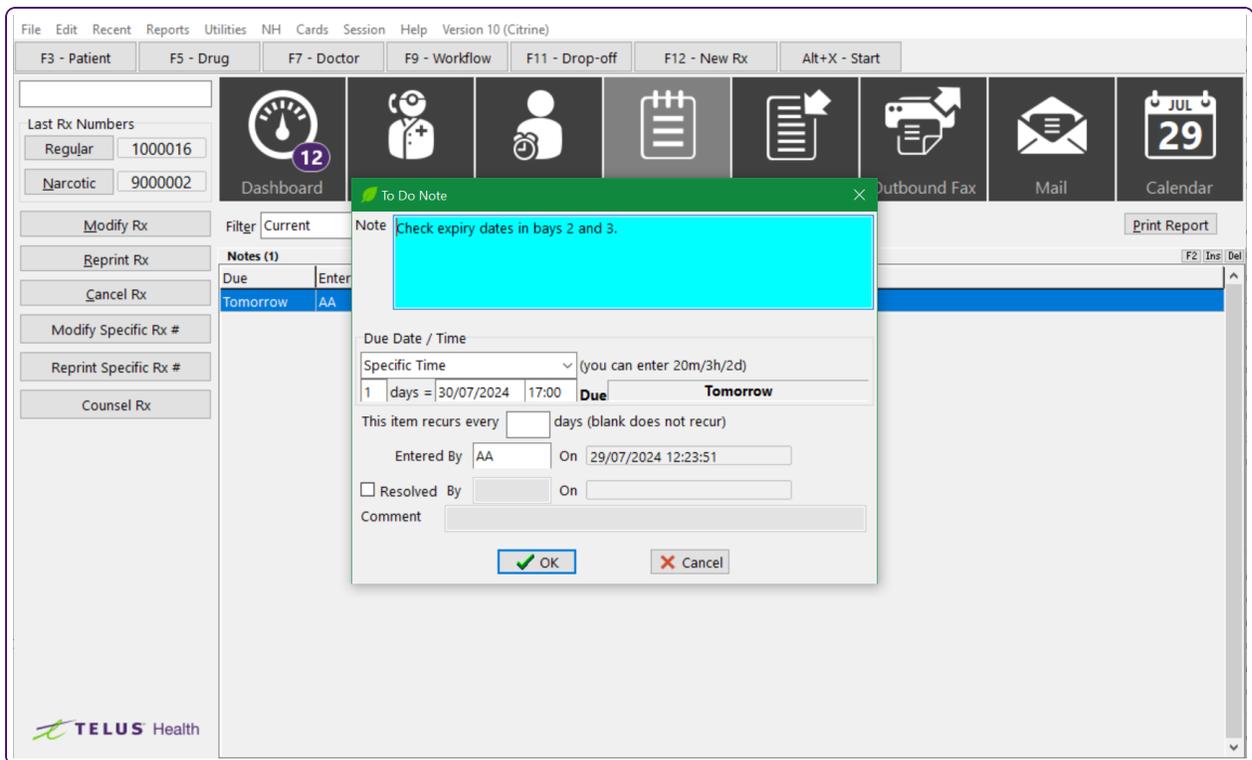
You can manually add a follow up entry by clicking Ins or pressing Insert and completing the **Patient Note** form. The following table describes the options in this form:

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	<p>Details of the patient follow-up.</p> <p>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.</p>

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.

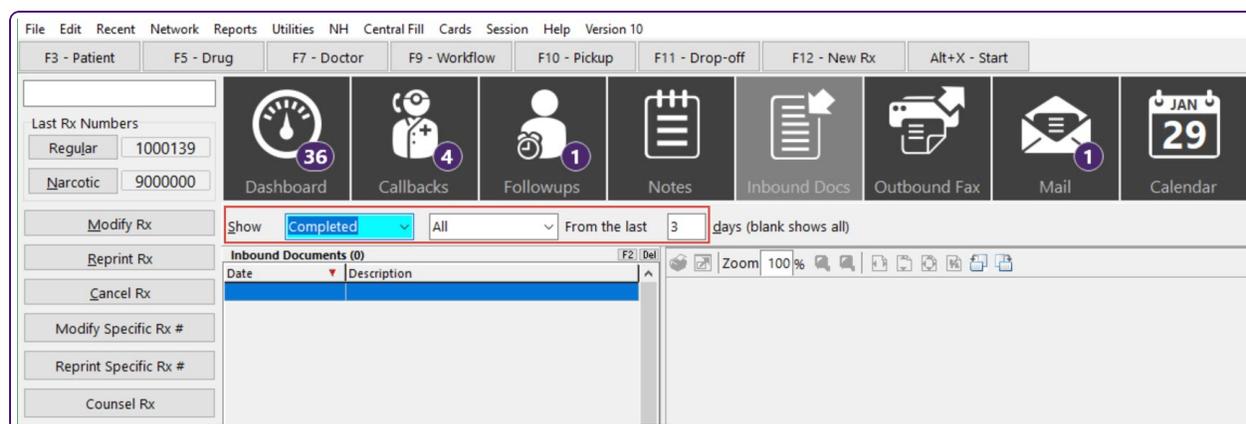
The following table describes the filters on this list.

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

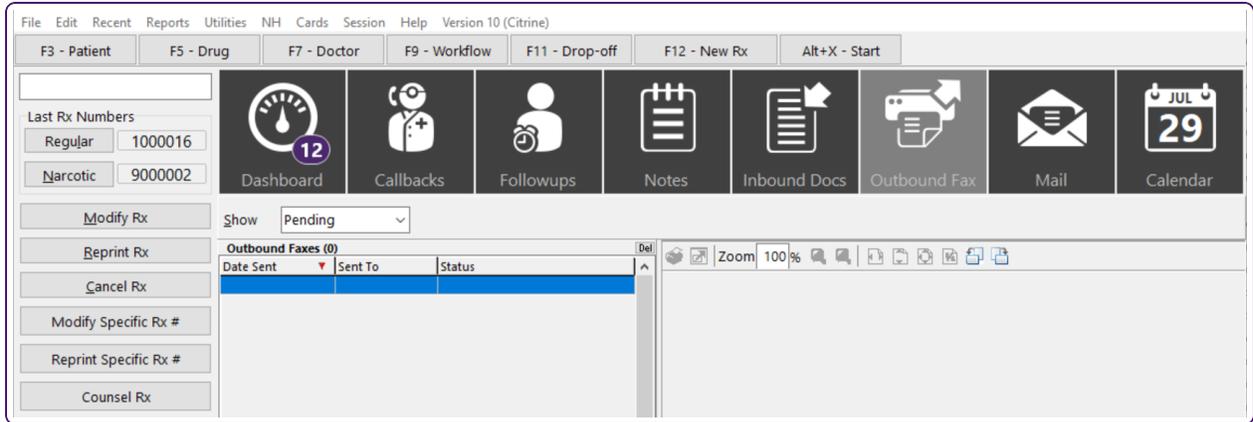


The **Inbound Docs** window displays images that have been scanned into the system via the document scanner or received via the fax or email. From the scan window, users can filter the **Inbound Documents** list by selecting Pending, Completed, or Deleted and Network Scan, Inbound Fax, or All from the 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*.

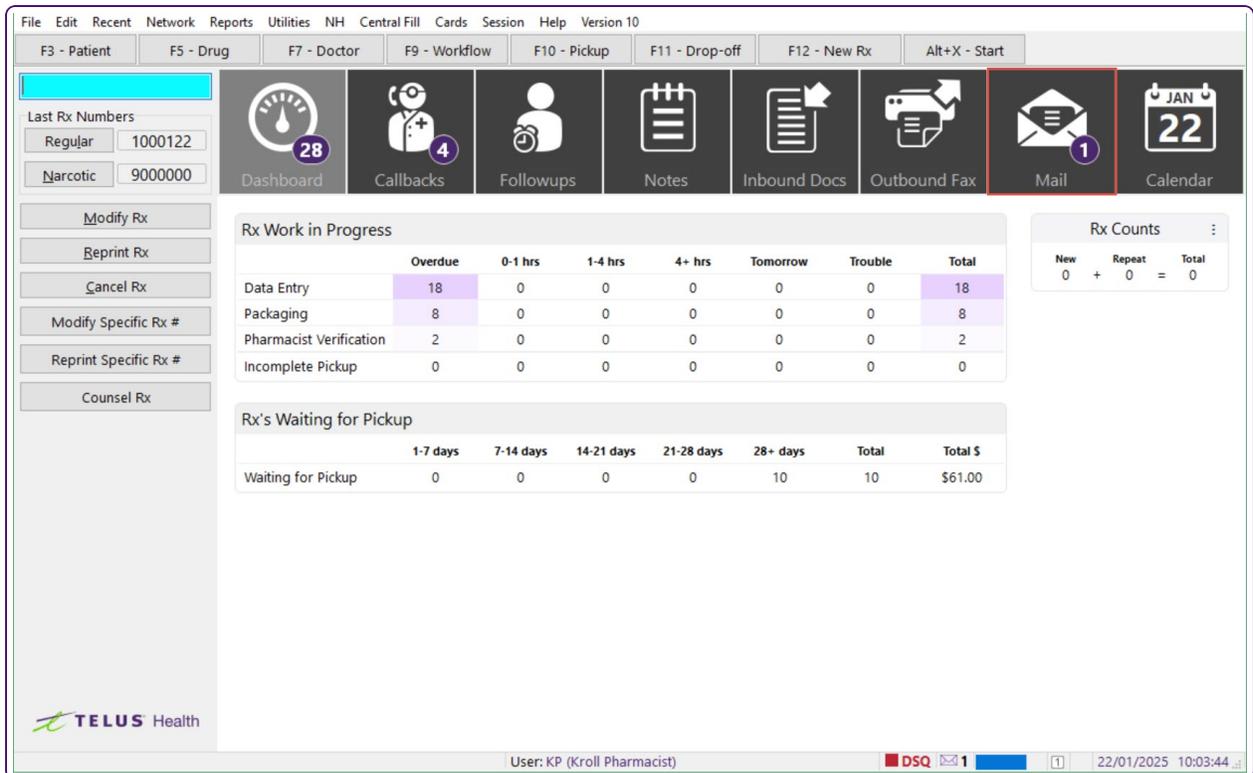
Outbound Fax

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

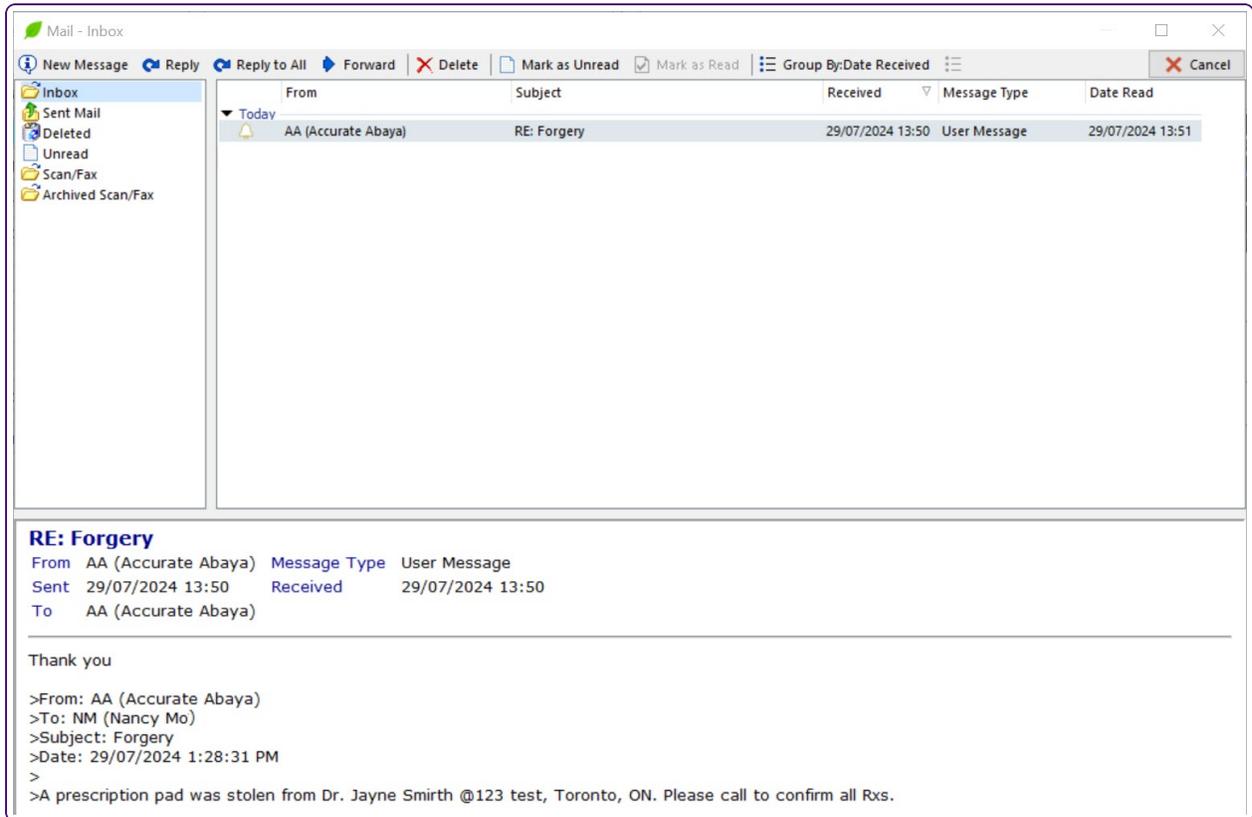


Mail

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.



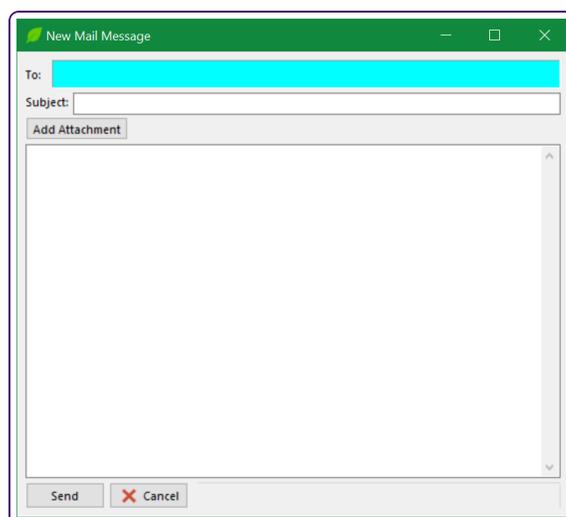
The number beside the mail icon identifies the number of unread messages you have. Select the mail icon or the envelope at the bottom of the window to access your inbox. Select a message to view it.



To compose a new message:

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

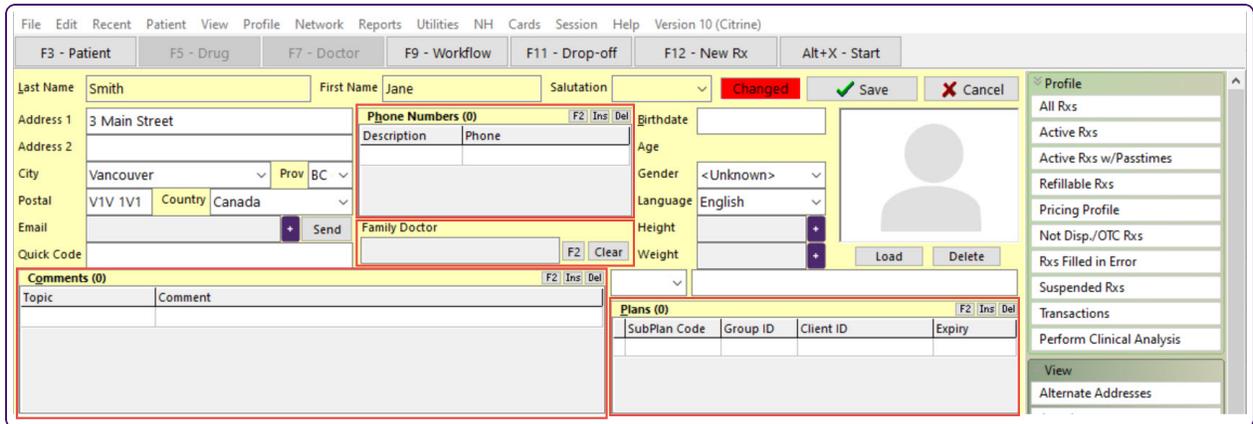
The **New Mail Message** window is displayed.



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.

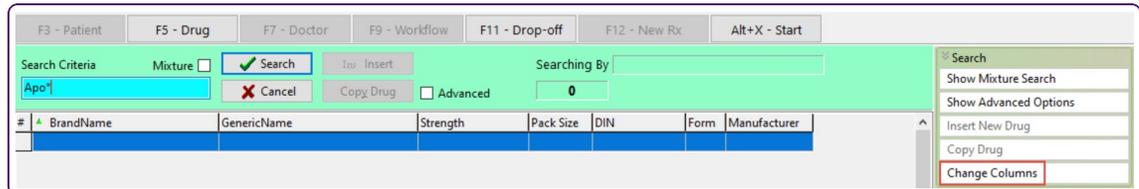
The following table describes the functions of these four buttons and identifies the keys on your keyboard you can press to trigger the same functions.

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.

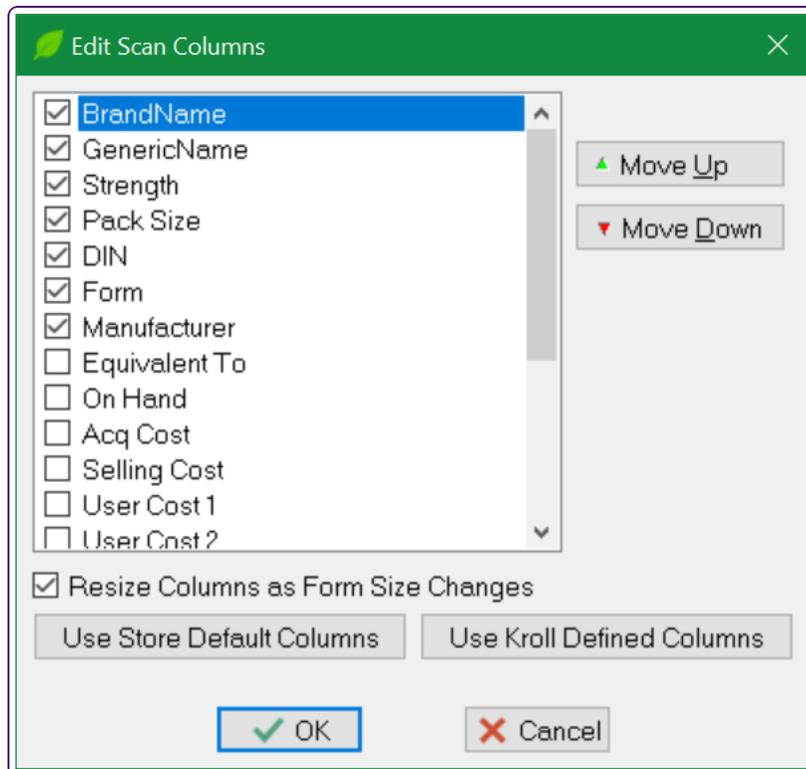
Configuring the columns in search windows

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**.



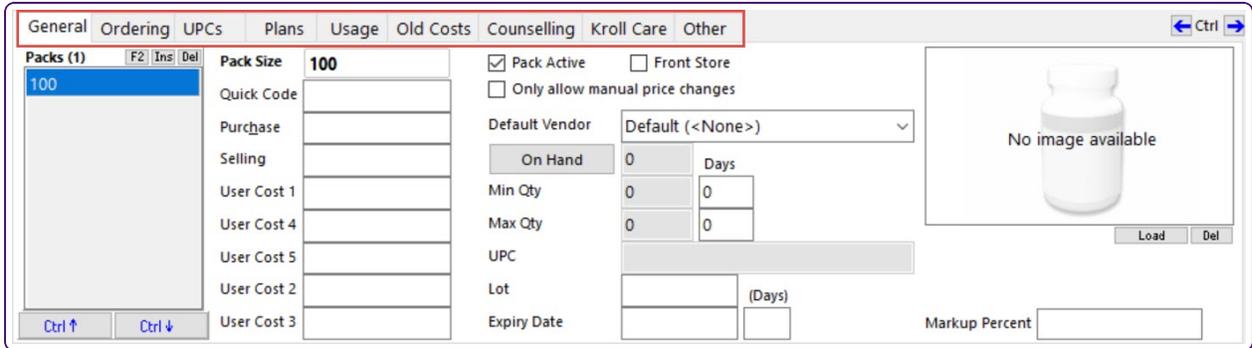
The **Edit Scan Columns** window is displayed.



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.



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**.



The screenshot shows the 'F3 - Patient' search window. The search criteria is '*smith'. The search results table is as follows:

#	Last Name	First Name	Address	City	Age	Phone	Plan
1	Smith	Zoe	3 Main Street	Vancouver	54		

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.

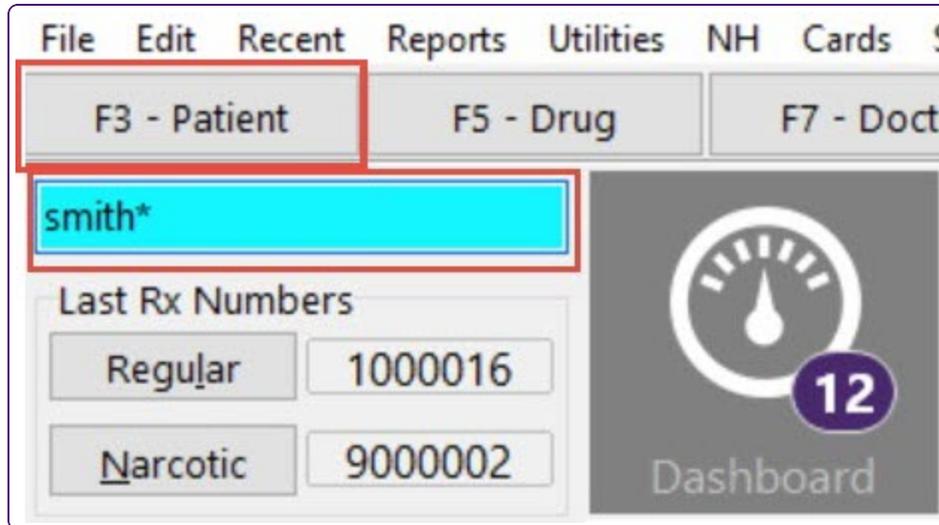
The screenshot displays the 'F3 - Patient' window for a patient named Zoe Smith. The window is organized into several sections:

- Header:** File Edit Recent Patient View Profile Network Reports Utilities NH Cards Session Help Version 10 (Citrine). Navigation buttons: F3 - Patient, F5 - Drug, F7 - Doctor, F9 - Workflow, F11 - Drop-off, F12 - New Rx, Alt+X - Start.
- Patient Information:**
 - Last Name: **Smith** (highlighted in cyan), First Name: Zoe, Salutation: [dropdown], OK, Save, Scan.
 - Address 1: 3 Main Street, Address 2: [empty], City: Vancouver, Prov: BC, Postal: V1V 1V1, Country: Canada.
 - Phone Numbers (0): [empty table with Description and Phone columns].
 - Birthdate: 07/07/1970, Age: 54 years, Gender: Female, Language: English.
 - Height: [empty], Weight: [empty].
 - Family Doctor: [empty], PI: 9735253058.
- Comments (0):** Table with Topic and Comment columns.
- Plans (1):**

SubPlan Code	Group ID	Client ID	Expiry
1 PI		9735253058	
- General Tab (Active):**
 - Patient:** Active, Alt. Last Name: [empty], Patient Type: Human, Deceased On: [empty].
 - Prescriptions:** Delivery Type: Default (Pickup), Delivery Route: [empty], Price Group: <None>, Drug line 1: Default (Brand) 2 Default (Generic), Double Count: Not Required.
 - No Kroll Care, No Wallet Card, Compliance Calendar on Label.
 - Consent:** Privacy: Unknown.
 - Unit Dose:** Type: <None>, Cycle: <None>, Price Group: <Default> (<None>).
 - Rx Totals:** Rx Count: 2, Dollar value: \$24.18, Reset date: [empty] (Reset button).
 - Snap Caps Requested (ID: [empty]), Snap Caps Documented (ID: 10).
- Other Tabs:** Allergies (0), Medical Conditions (0), Groups (0).

Method 2: From the Alt - X Start window

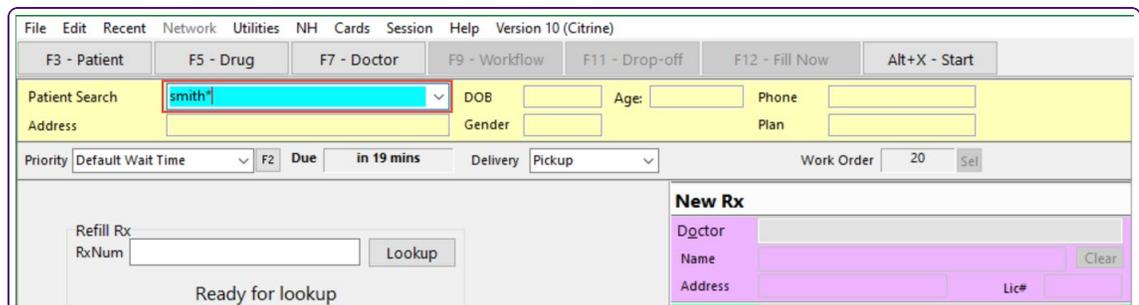
1. Enter any of the search criteria described above in the **Universal Search Field** and click **F3 - Patient**.



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.

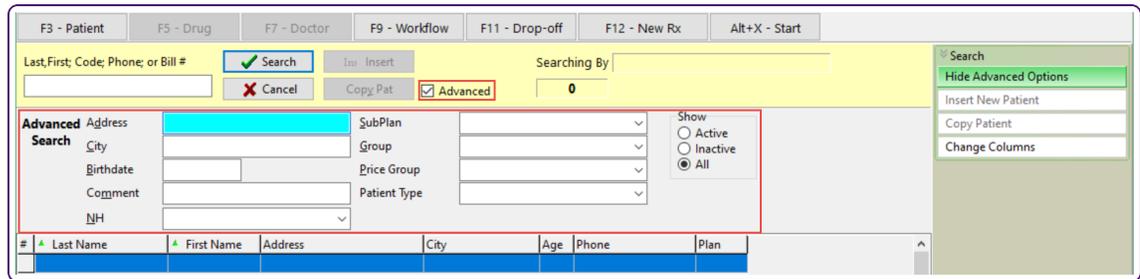
2. Double-click the applicable patient record.
The **F3 - Patient** window is displayed.

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.



The screenshot shows the 'F3 - Patient' window with the 'Advanced Search' pane open. The window has a menu bar with options: F3 - Patient, F5 - Drug, F7 - Doctor, F9 - Workflow, F11 - Drop-off, F12 - New Rx, and Alt+X - Start. Below the menu bar is a search input field with a 'Search' button (green checkmark) and a 'Cancel' button (red X). To the right of the search input is a 'Searching By' dropdown menu and a '0' counter. Below the search input is a 'Copy Pat' button and a checked 'Advanced' checkbox. The 'Advanced Search' pane is highlighted with a red border and contains several search criteria fields: Address, City, Birthdate, Comment, NH, SubPlan, Group, Price Group, Patient Type, and a 'Show' section with radio buttons for 'Active', 'Inactive', and 'All' (selected). To the right of the search pane is a 'Search' sidebar with options: 'Hide Advanced Options', 'Insert New Patient', 'Copy Patient', and 'Change Columns'. At the bottom of the window is a table with columns: #, Last Name, First Name, Address, City, Age, Phone, and Plan.

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.

The screenshot shows the 'F3 - Patient' form. At the top, there are tabs for 'F3 - Patient', 'F5 - Drug', 'F7 - Doctor', 'F9 - Workflow', 'F11 - Drop-off', 'F12 - New Rx', and 'Alt+X - Start'. The patient's name is 'Smith, Zoe', birthdate is '07/07/1970', and age is '54 years'. The 'Active' checkbox is checked. There are sections for 'Comments (0)', 'Allergies (0)', 'Medical Conditions (0)', and 'Groups (0)'. The 'Plans (1)' table shows one plan with SubPlan Code '1', Group ID 'PI', and Client ID '9735253058'. The 'General' tab is selected, showing 'Patient' information with 'Active' checked, 'Patient Type' as 'Human', and 'Deceased On' as empty. There are also sections for 'Prescriptions', 'Consent', 'Unit Dose', 'Cycle', 'Price Group', 'Rx Totals', and 'Snap Caps' options.



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.

The screenshot shows the 'F3 - Patient Search' window. At the top, there are tabs for 'F3 - Patient', 'F5 - Drug', 'F7 - Doctor', 'F9 - Workflow', 'F11 - Drop-off', 'F12 - New Rx', and 'Alt+X - Start'. The search criteria are 'Last,First; Code; Phone; or Bill #' and 'Advanced' is checked. The 'Show' options are 'Active', 'Inactive', and 'All', with 'All' selected. The search results table is empty.



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

Configuring columns in the Patient Search window

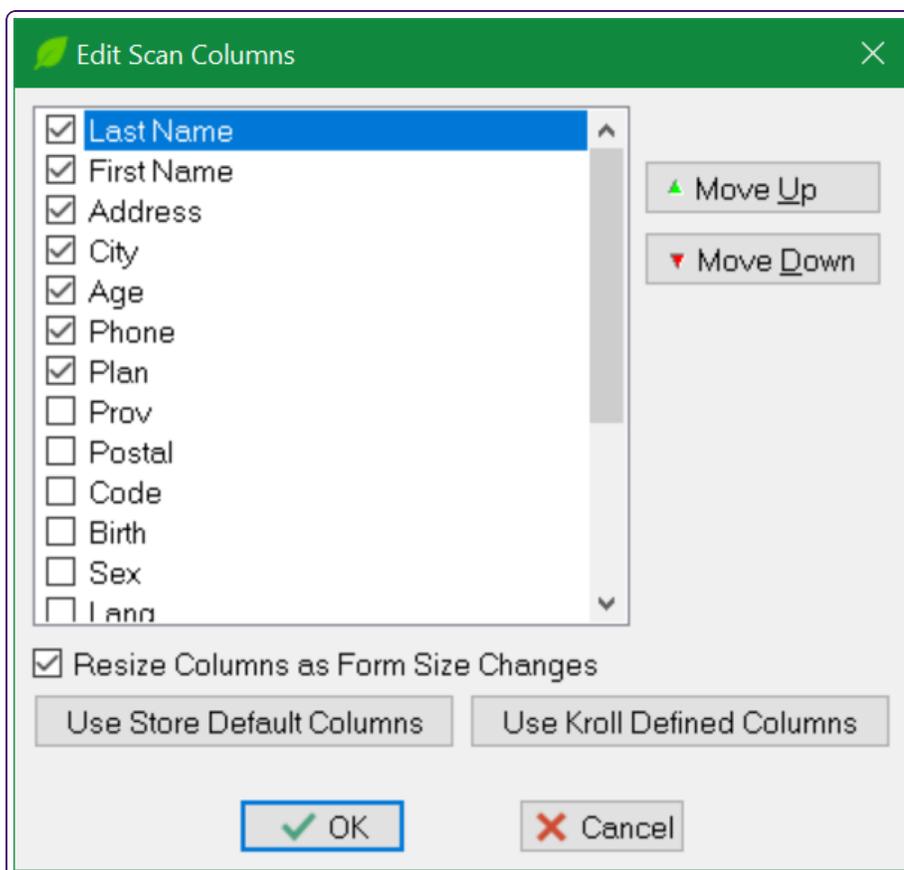
You can change which the columns are displayed in the **Patient Search** window.

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 screenshot shows a search interface with a toolbar at the top containing buttons for F3 - Patient, F5 - Drug, F7 - Doctor, F9 - Workflow, F10 - Pickup, F11 - Drop-off, F12 - New Rx, and Alt+X - Start. Below the toolbar, there is a search criteria field labeled 'Last,First; Code; Phone; or Bill #' containing the text 'smithj'. To the right of this field are buttons for 'Edit', 'Ins Insert' (highlighted with a red box), 'Cancel', and 'Copy Pat'. Further right, there is a 'Searching By' dropdown menu set to 'Last Name, First Name', a '0' in a box, and the text 'No Records Found'. A checkbox for 'Advanced' is checked.

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

The screenshot shows a 'Patient Name' popup window with a green header and a close button. The form contains the following fields: 'Salutation' (dropdown menu), 'Last Name' (text field containing 'Smith' which is highlighted in cyan), 'First Name' (text field containing 'J'), 'Middle Name' (empty text field), 'Suffix' (dropdown menu), 'Preferred First Name' (empty text field), and 'Alternate Last Name' (empty text field). At the bottom of the form are two buttons: 'Ok' with a green checkmark and 'Cancel' with a red X.

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.

The screenshot shows the 'F3 - Patient' window for 'M. Smith, JK'. The window has a yellow header with 'M. Smith, JK' and a 'Modify' button. Below the header are several sections:

- Address:** Address 1, Address 2, City, Postal, Country, Email, Quick Code, Family Dr.
- Phone Numbers (0):** A table with columns for Description and Phone.
- Personal Info:** Birthdate, Age, Language (Anglais), Sex (<Unknown>), Gender, Pronouns, Height, Weight, RAMQ.
- Comments (0):** A table with columns for Topic and Comment.
- Plans (0):** A table with columns for SubPlan Code, Group ID, Client ID, and Expiry.
- Allergies (0):** A section with an 'Add Drug' button and a table.
- Medical Conditions (0):** A section with a table.
- Groups (0):** A section with a table.
- General:** Patient Active (checked), Patient Type (Human), Deceased On, Prescriptions (Delivery Type, Delivery Route, Price Group, Drug line 1, Double Count), and checkboxes for 'No Krill Care', 'No Wallet Card', and 'Compliance Calendar on Label'.
- Consent:** Privacy (Unknown), Unit Dose (Type, Cycle, Price Group), Rx Totals (Rx Count, Dollar value, Reset date), and checkboxes for 'Snap Caps Requested' and 'Snap Caps Documented'.

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.

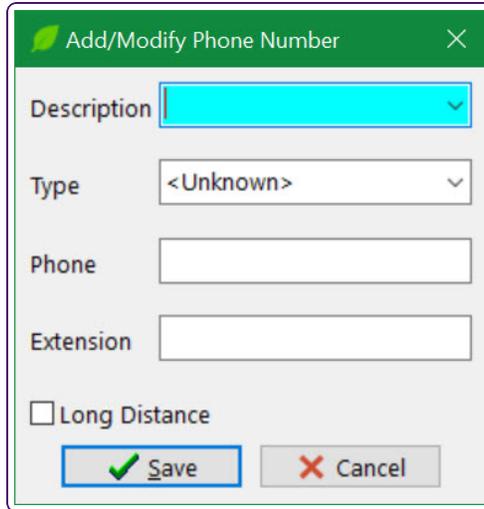
- In the **E-mail** field, enter the patient's email address.
 - Select the applicable **Notification Events**.
 - To initiate an email message to the address you entered, select **Send Email**. The message is created in your local email application.
 - Select **Save**.
6. Optionally enter a **Quick 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:

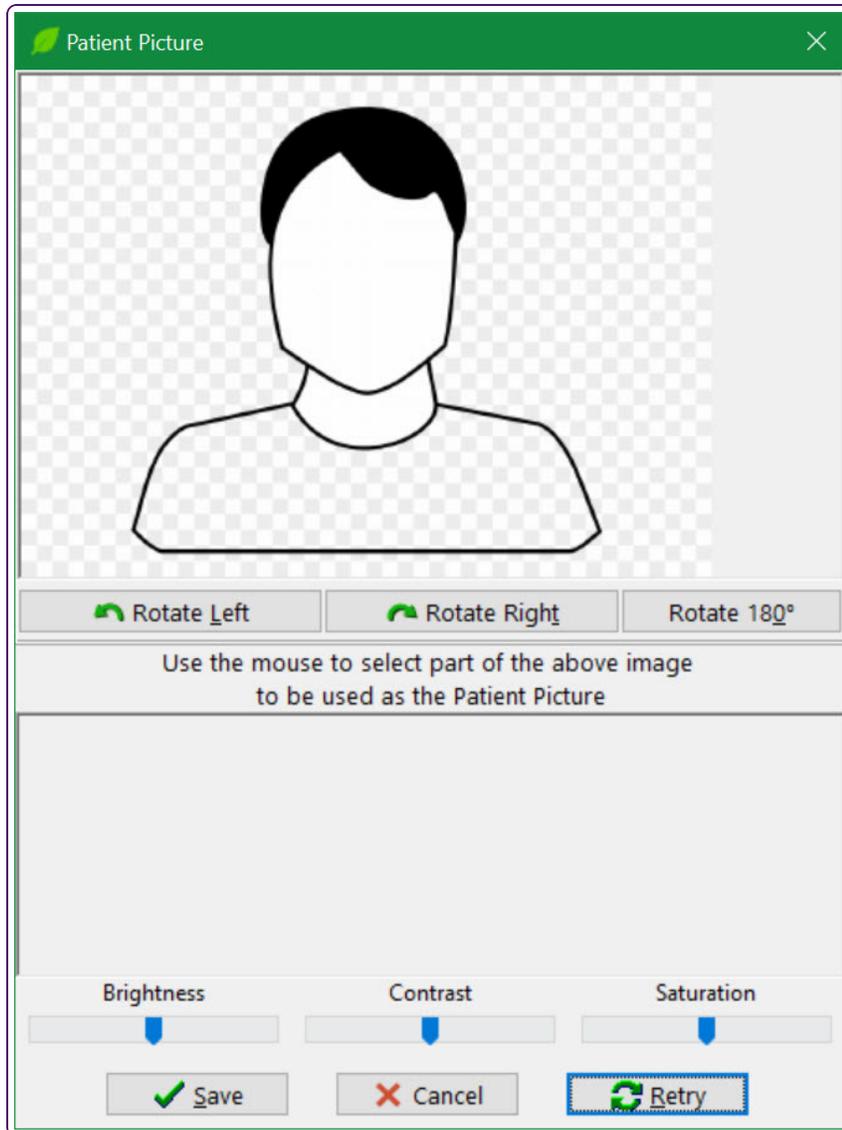
- Optionally select the **Source**.
- Enter the **Height**, choose the measurement, and optionally enter a comment.
Use the same measurements to record height and weight, to maintain database consistency (i.e. use feet or centimeters for height, and pounds or kilograms for weight).
- Select **Save**.

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.

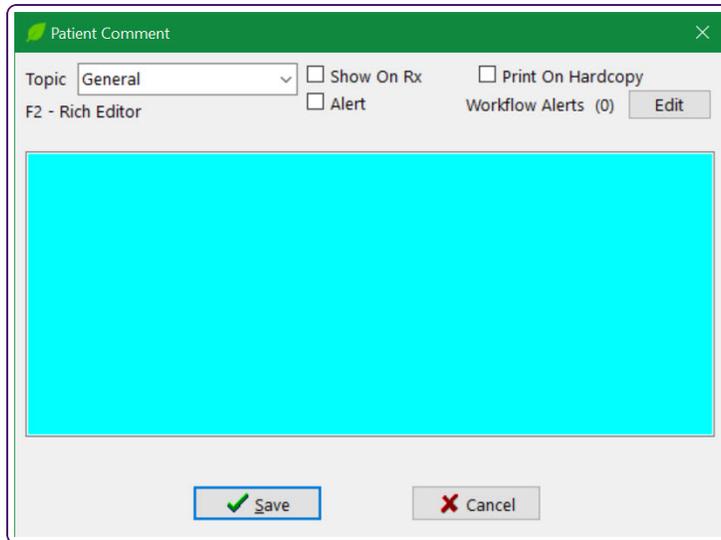


- You can also select **Retry**, then select **From Other File** to load a saved image.
- Optionally adjust the photo, then select **Save**.

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.

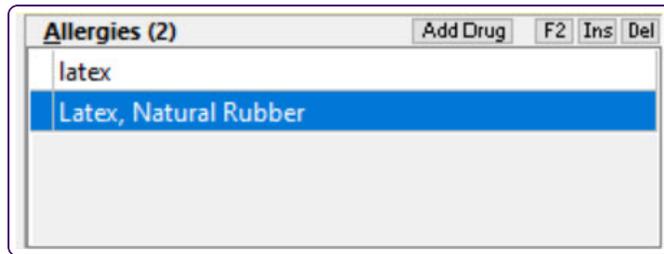
- Select **Ins**, or simply begin typing the name of the plan.

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**.

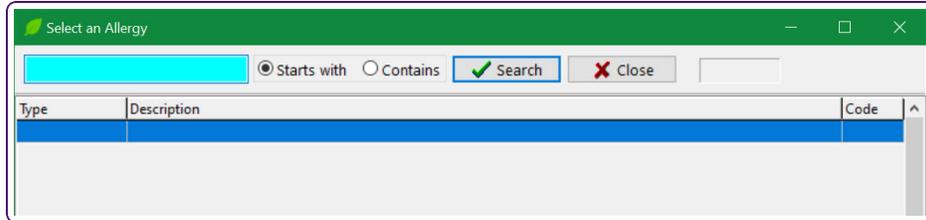
17. In the **Allergies** section, add the patient's allergies.



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

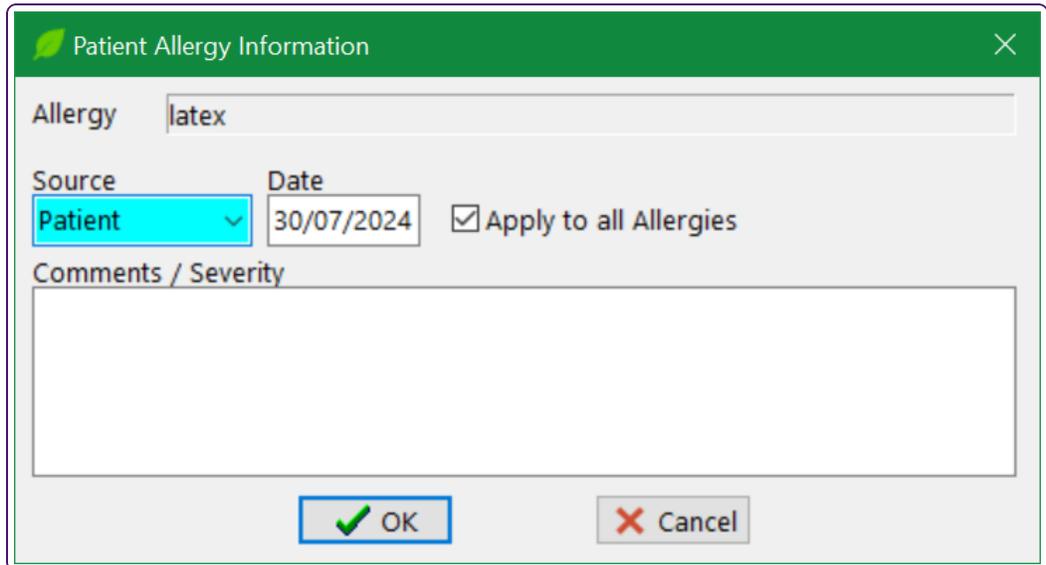
- To enter a therapeutic class of allergy:
 - Select **Ins**.

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.



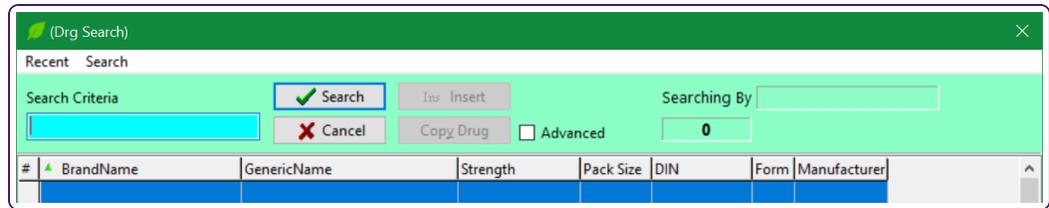
- Select the **Source** of the allergy.
- Enter the **Date** the allergy was reported.
- If all of the allergies were reported on the same date and by the same source, select **Apply to all Allergies**.
- Optionally enter any **Comments** regarding the allergy.

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

- Select **OK**.

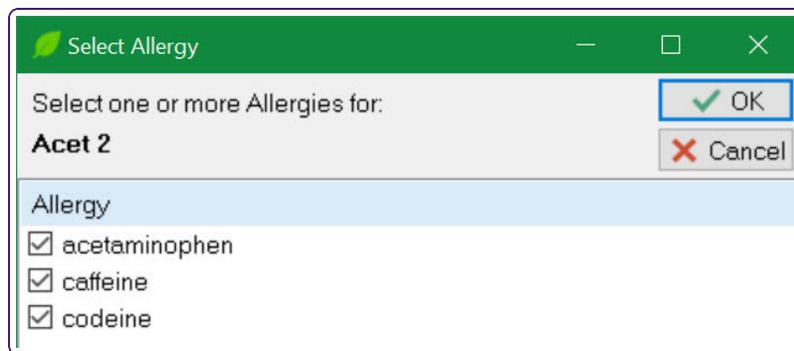
- To add an allergy by searching for a specific drug:
 - Select the **Add Drug** button.

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.

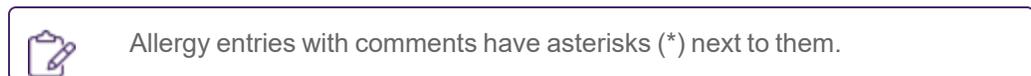


This window displays all of the components of the selected drug.

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

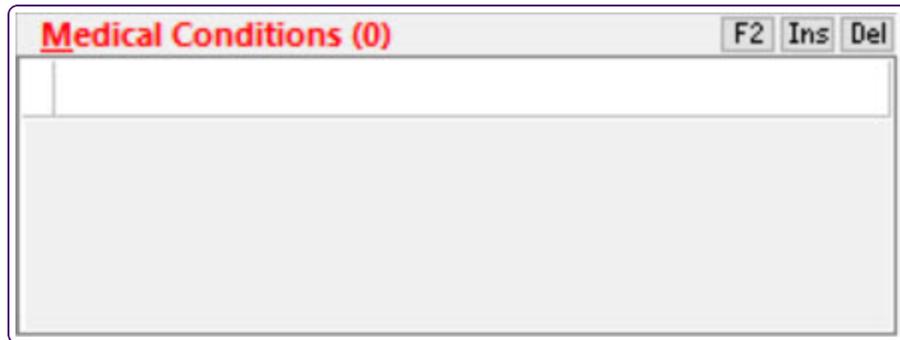
The **Patient Allergy Information** pop-up is displayed.

- 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.



- Select **OK**.

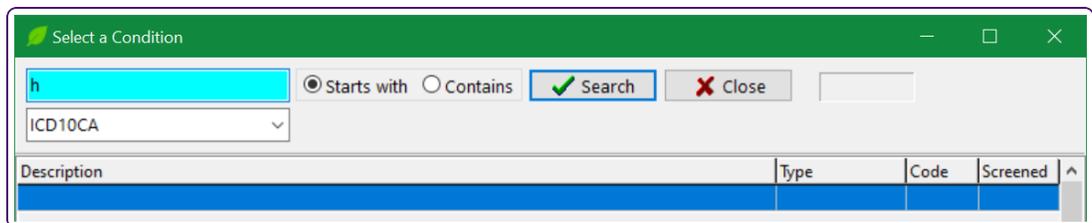
18. In the **Medical Conditions** section, add the patient's medical conditions.



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.

The screenshot shows a window titled "Patient Condition Information" with a close button (X) in the top right corner. The window contains the following fields and controls:

- Condition:** A text field containing "Hepatocellular carcinoma NOS".
- Source:** A dropdown menu with "Patient" selected.
- Date:** A text field containing "30/07/2024".
- Apply to all Conditions:** A checked checkbox.
- Comments / Severity:** A large empty text area.
- Buttons:** "OK" (with a green checkmark icon) and "Cancel" (with a red X icon) buttons at the bottom.

- 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.

The screenshot shows a window titled "Add/Delete Groups for Smith, J" with standard window controls (minimize, maximize, close) in the top right corner. The window is divided into three main sections:

- Available Groups:** A list box containing "PartQ" and a count of "1" next to it.
- Selected Groups:** A list box containing "PartE" and a count of "1" next to it.
- Buttons:** "OK" (with a green checkmark icon), "Cancel" (with a red X icon), "Insert All >>", and "<< Delete All" buttons.

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.

The screenshot shows a software interface for patient information. At the top, there are four tabs: **General**, **Family**, **Nursing Home**, and **Other**. The **General** tab is currently selected and highlighted with a red border. To the right of the tabs is a navigation control with a left arrow, the text "Ctrl", and a right arrow.

The main content area is divided into several sections:

- Patient**: Includes a checked "Active" checkbox, an "Alt. Last Name" text field, a "Patient Type" dropdown menu set to "Human", and a "Deceased On" text field with an "F2" button next to it.
- Prescriptions**: Includes a "Delivery Type" dropdown set to "Default (Pickup)", a "Delivery Route" dropdown, a "Price Group" dropdown set to "<None>", a "Drug line 1" dropdown set to "Default (Brand)" with a "2" next to it and another dropdown set to "Default (Generic)", and a "Double Count" dropdown set to "Not Required". Below these are three checkboxes: "No Kroll Care", "No Wallet Card", and "Compliance Calendar on Label".
- Consent**: Includes a "Privacy" dropdown set to "Unknown".
- Unit Dose**: Includes a "Type" dropdown set to "<None>", a "Cycle" dropdown set to "<None>", and a "Price Group" dropdown set to "<Default> (<None>)".
- Rx Totals**: Includes a "Rx Count" text field, a "Dollar value" text field, and a "Reset date" text field with a "Reset" button next to it.
- At the bottom right, there are two checkboxes: "Snap Caps Requested" and "Snap Caps Documented", and an "ID" text field containing the number "12".

General

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

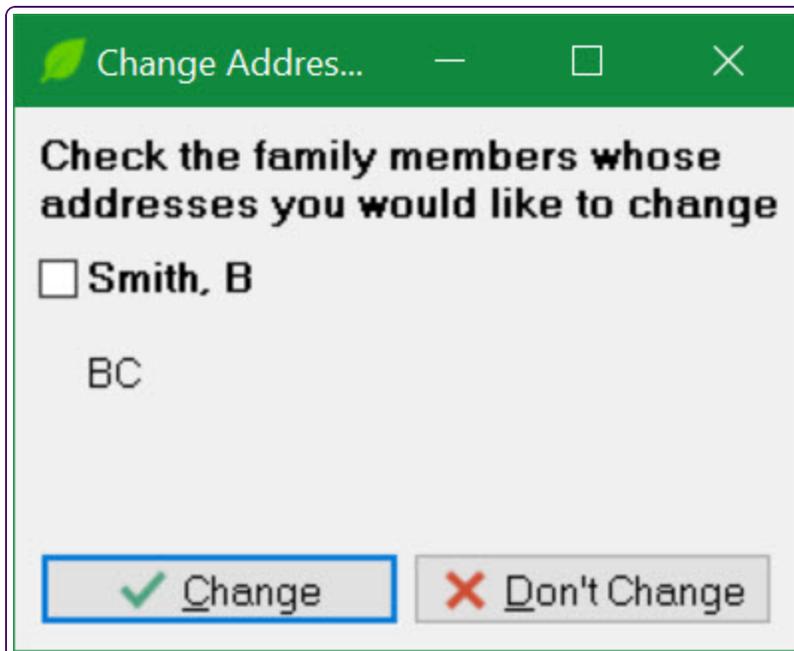
1. If the patient has not filled a prescription with the pharmacy for an extended period of time, and you do not want them appearing in the regular patient search, deselect the Active checkbox.
Inactive patients are excluded from reports unless otherwise specified in the **Options** tab of the report.
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.

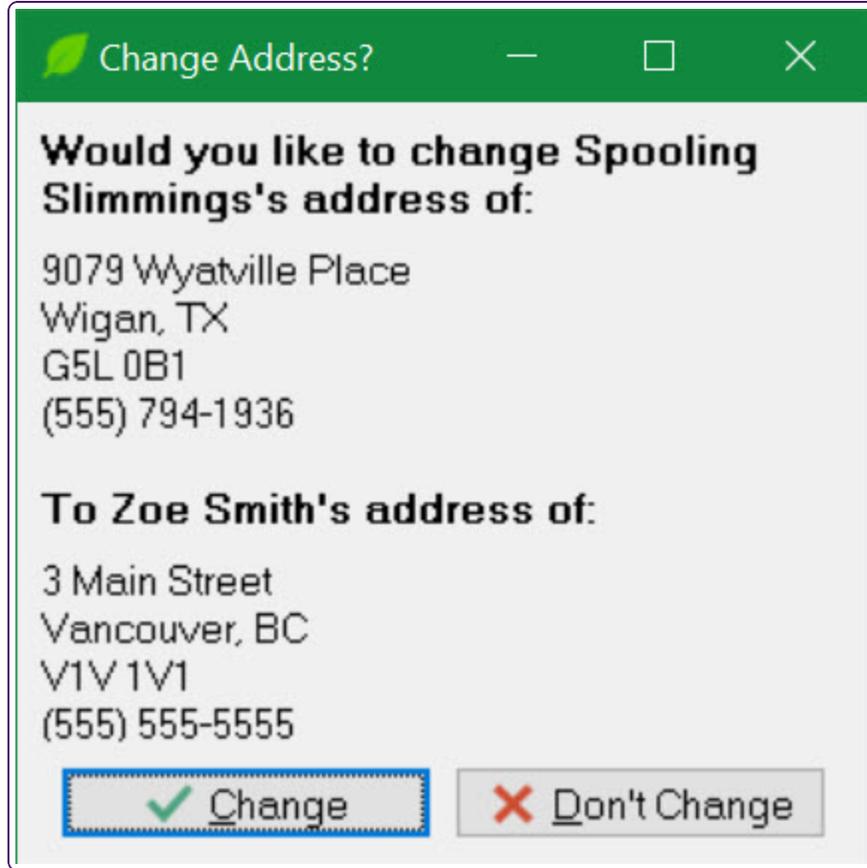
To add a family member:

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.



Change Address?

Would you like to change Spooling Slimmings's address of:

9079 Wyatville Place
Wigan, TX
G5L 0B1
(555) 794-1936

To Zoe Smith's address of:

3 Main Street
Vancouver, BC
V1V 1V1
(555) 555-5555

Change **Don't Change**

3. Select the applicable button.

The family member is added.

Last Name	First Name	Age	Address1	City
Smith	B		3 Main Street	Vancouver
Smith	Zoe	54	3 Main Street	Vancouver



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.

Home | Abc Nursing Home | Admit Date: 29/09/2014 | Inactive:

Ward | Ward 1 | Discharge Date:

Cycle | <Default> | Last TMR Date:

Room | 200 | **Bed** | 2 | **Status** |

Diet |

Comment |

Standing Orders (0)

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.

Start Patient Leave of Absence for Tagnaouti Moummani, Lili-Rose

Start Date: 04/10/2024 10:04 End Date: [] []

Reason: Leave of Absence

Comment: []

Select Rx's to Suspend A - Select/Deselect All D - Detail Rx Suspension History

#	Status	Orig Rx	RxNum	Date	Ago	Qty	Auth	Rem	BrandName	Doctor	Sig
1		1000088	1000089	02/05/2024	155	1	1	0	Bexsero	Dumais, Guy	*1
2		1000063	1000068	01/05/2024	156	14	14	0	Apo Citalopram 2	Dumais, Guy	*1
3		1000005	1000061	26/04/2024	161	14	84	56	Apo Carbamazep	Dumais, Guy	*1
4		1000060	1000060	26/04/2024	161	14	14	0	Apo Alfuzosin 10	Dumais, Guy	*1
5		1000056	1000056	26/04/2024	161	14	140	126	Apo Verap SR 12	Dumais, Guy	*1
6		1000055	1000055	26/04/2024	161	10	20	10	Apo Celecoxib 20	Dumais, Guy	*1
7	Cancelled	1000019	1000028	09/02/2024	238	160	160	160	Jamp Tretinoin 10	Dumais, Guy	SIG

OK to Save

Suspend reason: Patient not available Resume reason: Suspend reason no longer applies

[Save] [Cancel]

- 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.

The screenshot shows the 'NH Standing Orders' window. It features a green title bar with a leaf icon and the text 'NH Standing Orders'. Below the title bar is a text area labeled 'Description (Ctrl-Enter for new line)' which is currently empty. Below the text area are several fields: an 'Inactive' checkbox, an 'Inactive On' date field, a 'Med Type' dropdown menu, a 'Pass Times' dropdown menu with six rows, two checked checkboxes for 'Print on MAR' and 'Print on TMR', a 'Date Added' date field, and a 'Source' dropdown menu. At the bottom are 'OK' and 'Cancel' buttons.

- 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.

General **Family (3)** Nursing Home Other

Emergency Contacts (0) F2 Ins Del

Name	Relationship	Daytime Phone	Other Phone

Created On 09/07/2024 15:34:06
 Changed On 31/07/2024 10:43:47
 Last Rx On 18/07/2024 13:02:40

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.

File Edit Recent Search Utilities NH Cards Session Help Version 10 (Citrine)

F3 - Patient F5 - Drug F7 - Doctor F9 - Workflow F11 - Drop-off F12 - New Rx Alt+X - Start

Last,First; Code; Phone; or Bill # Edit Ins Insert Searching By Last Name, First Name (Advanced)
 smith, jane Cancel Copy Pat Advanced 0 No Records Found

#	Last Name	First Name	Address	City	Age	Phone	Plan

(Pat Search)

Recent Search

Last,First; Code; Phone; or Bill # Search Ins Insert Searching By
 Cancel Copy Pat Advanced 0

#	Last Name	First Name	Address	City	Age	Phone	Plan

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

The screenshot shows a search window titled "(Pat Search) smith, zoe". It has a search bar containing "smith, zoe" and buttons for "Select", "Cancel", "Copy Pat", and "Advanced". The search criteria are set to "Last Name, First Name" and "1 Record Found" is displayed. Below the search bar is a table with the following data:

#	Last Name	First Name	Address	City	Age	Phone	Plan
1	Smith	Zoe	3 Main Street	Vancouver	54		

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**.

#	Status	Orig Rx	RxNum	Date	Ago	Qty	Auth	Rem	BrandName	Doctor	Sig
1	Pending Adj (Inact)	9000001	9000001	18/07/2024	13	60	60	0	AC&C Tablets 375/15.6mg	Attach.Radium	AA
2	Needs Review (Inact)	1000002	1000002	17/07/2024	14	12	60	48	Tylenol 8 Hour Extended Relief Caple	Attach.Radium	AA

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:

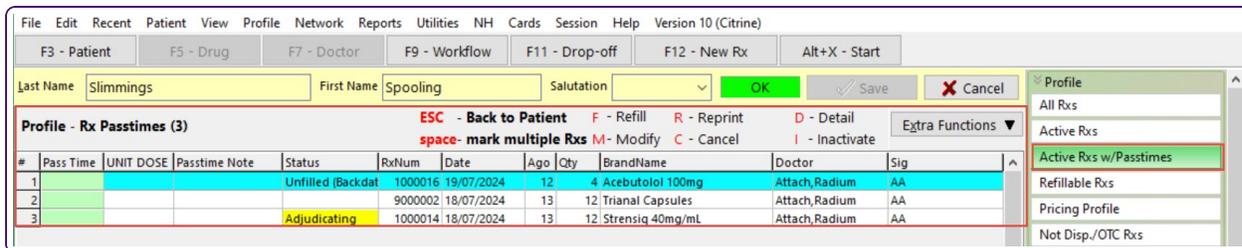
- From the patient profile or **F11 - Drop-off** window, press **Shift + F5** or select **Active Rxs** from the right navigation pane.
- From the patient profile, select **Profile > Active Rxs**.

#	Status	Orig Rx	RxNum	Date	Ago	Qty	Auth	Rem	BrandName	Doctor	Sig
1	Unfilled (Backdated)	1000015	1000016	19/07/2024	12	4	12	12	Acebutolol 100mg	Attach.Radium	AA
2		9000002	9000002	18/07/2024	13	12	12	0	Trianal Capsules	Attach.Radium	AA
3	Adjudicating	1000014	1000014	18/07/2024	13	12	12	0	Strensiq 40mg/mL	Attach.Radium	AA

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.

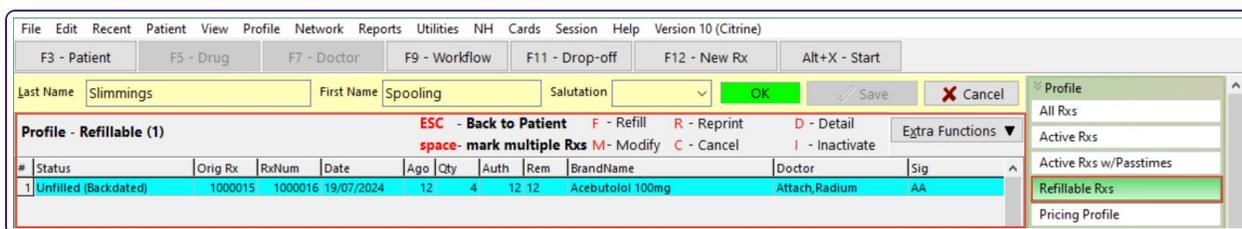
To access the **Active Rxs** view, from the patient profile or **F11 - Drop-off** window, press **Shift + F10** or select **Active Rxs w/ Passtimes** from the right navigation pane.



Refillable

The **Refillable Rx**s 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.

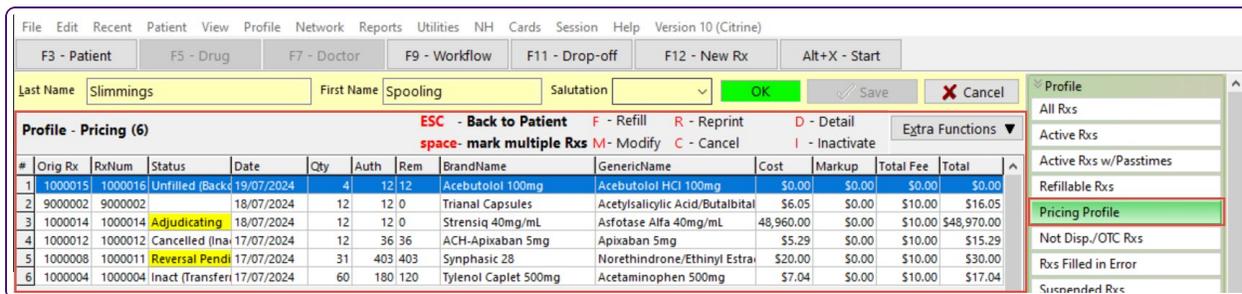
To access the **Refillable Rx**s view, from the patient profile or **F11 - Drop-off** window, press **Shift + F6** or select **Refillable Rx**s from the right navigation pane.



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 Rx

The **Not Dispensed/OTC Rx**s 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**.

The screenshot shows the 'Profile - Rxs Filled in Error' window for patient Slimmings, Spooling. The table contains the following data:

#	Status	Orig Rx	RxNum	Date	Ago	Qty	Auth	Rem	BrandName	Doctor	Sig
1	Adjudicating (Inact)	1000013	1000013	17/07/2024	14	60	120 120		Tylenol Caplet 500mg	Attach,Radium	AA
2	Cancelled (Inact)	1000007	1000007	17/07/2024	14	31	403 403		Synphasic 28	Attach,Radium	AA
3	Unfilled (Inact)	1000005	1000006	17/07/2024	14	12	36 36		Tylenol Arthritis Pain Extended Relief	Attach,Radium	AA
4	Reversal Pending (Inact)	1000003	1000003	17/07/2024	14	12	23 23		Synalar Soln 0.01%	Attach,Radium	AA

Transactions

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

The screenshot shows the 'Profile - Transactions' window for patient Christophe, Lylou. The table contains the following data:

#	Status	Orig Rx	RxNum	Date	Ago	Qty	Auth	Rem	BrandName	Doctor	Sig
1		1000092	1000092	19/06/2024	107	90	270 180		Apo Aifuzosin 10mg	Dumais,Guy	*1

Suspended Rxs

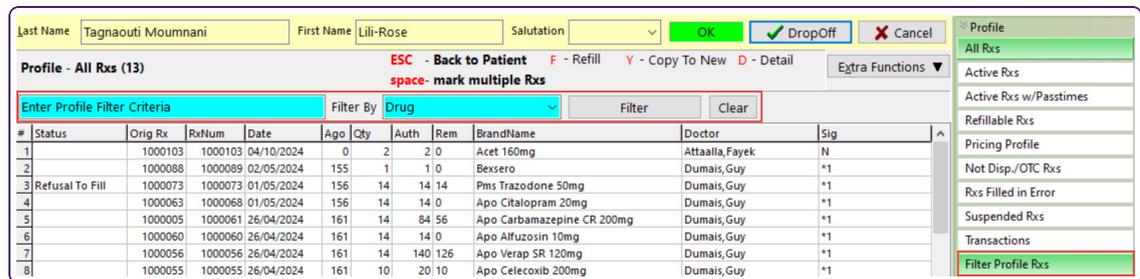
The **Suspended Rxs** view displays Rxs that were marked as suspended.

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.

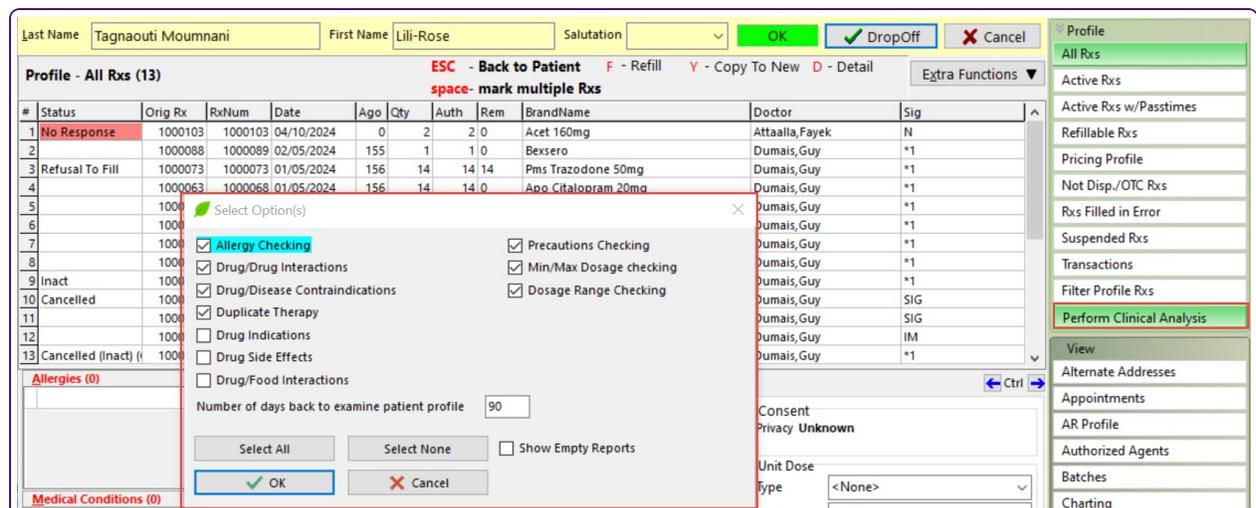


3. Enter your search criteria
4. From the **Filter By** drop-down list, select Drug or Rx Comment.
5. Select **Filter**.

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

Perform Clinical Analysis

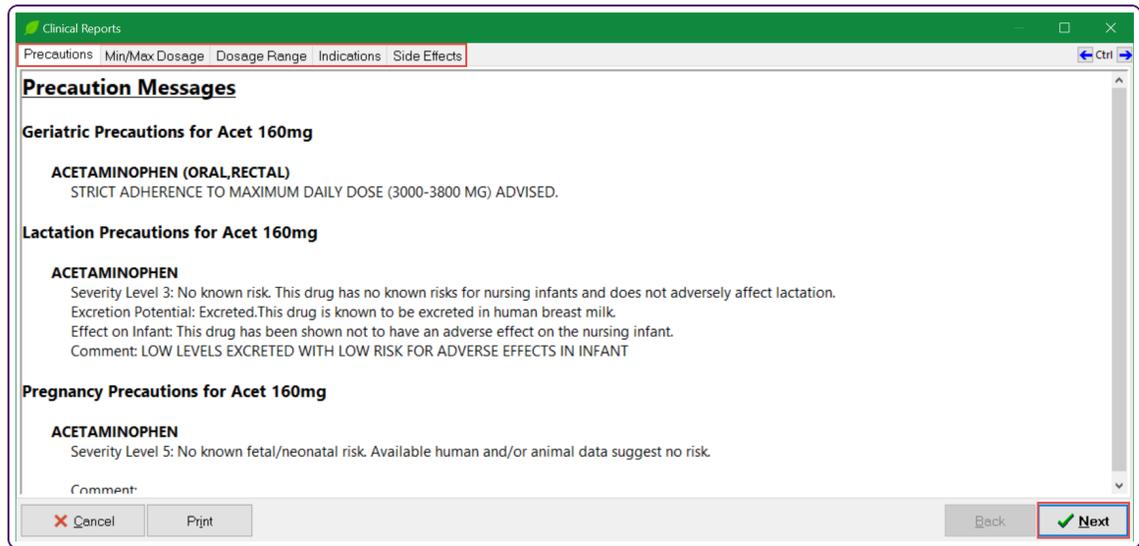
Select the **Perform Clinical Analysis** option from the patient sidebar to a perform a clinical interactions analysis on a patient's medication profile,



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.



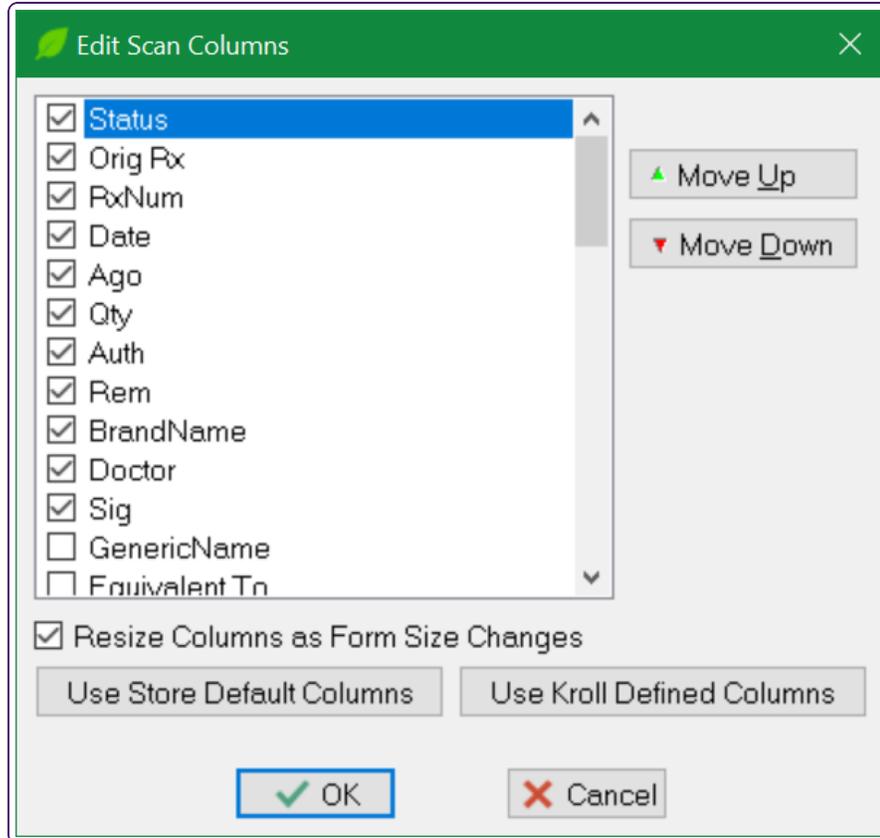
Configuring the columns in the Patient Profile

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.

#	Status	Orig Rx	RxNum	Date	Ago	Qty	Auth	Rem	BrandName	Doctor	Sig
1		1000018	1000018	31/07/2024	1	12	36 24		ACH-Teriflunomide 14mg	Attach,Radium	AA
2		1000017	1000017	31/07/2024	1	12	12 0		Aricept 5mg	Attach,Radium	AA

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.

#	Status	Orig Rx	RxNum	Date	Ago	Qty	Auth	Rem	BrandName	Doctor	Sig
1		1000018	1000018	31/07/2024	1	12	36 24		ACH-Teriflunomide 14mg	Attach,Radium	AA
2		1000017	1000017	31/07/2024	1	12	12 0		Aricept 5mg	Attach,Radium	AA
3	Unfilled (Backdated)	1000015	1000016	19/07/2024	13	4	12 12		Acebutolol 100mg	Attach,Radium	AA
4		9000002	9000002	18/07/2024	14	12	12 0		Trianal Capsules	Attach,Radium	AA
5	Adjudicating	1000014	1000014	18/07/2024	14	12	12 0		Strensiq 40mg/mL	Attach,Radium	AA
6	Cancelled (Inact) (Refusal To	1000012	1000012	17/07/2024	15	12	36 36		ACH-Apixaban 5mg	Attach,Radium	AA

- Repeat this step to tag additional Rxs.

F-Refill

To tag prescriptions for refill:

- Highlight or tag the prescription(s) to be refilled.
- 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.

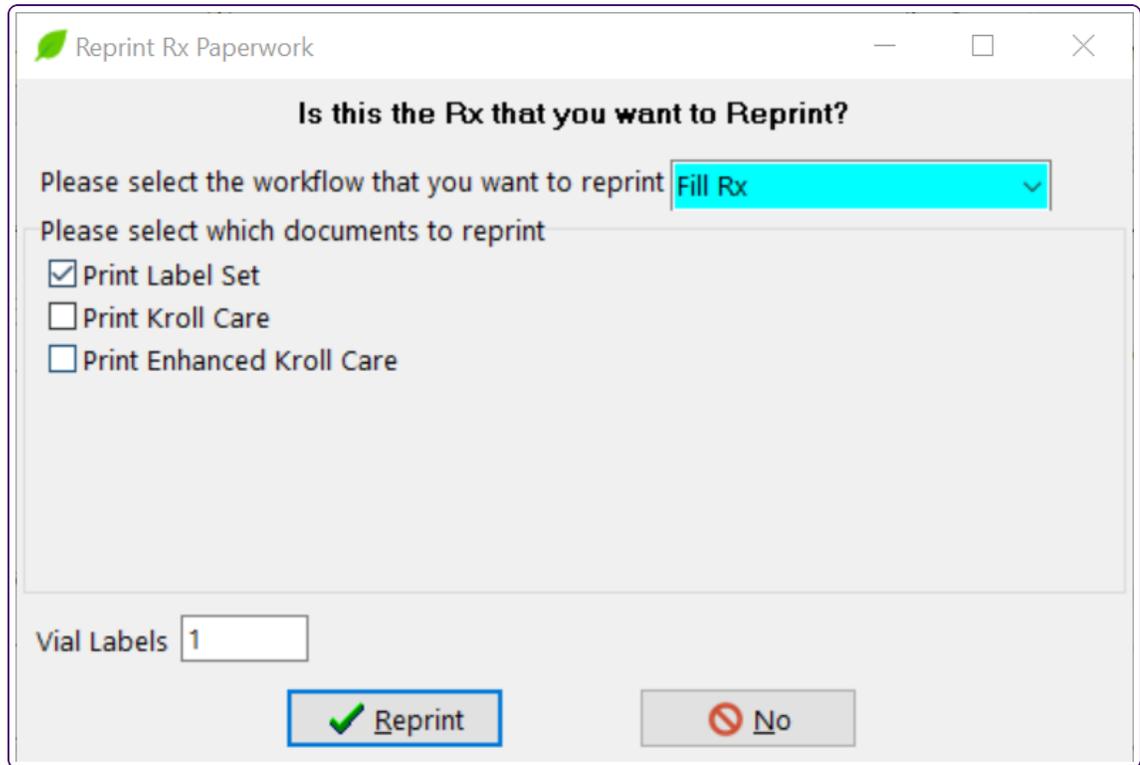
Once a prescription has been adjudicated to a plan, only certain fields can be modified. Fields that impact price are read-only.

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:

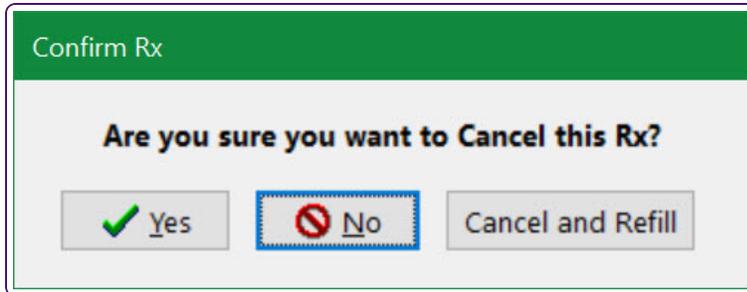
1. Highlight or tag the prescription(s) from the patient profile.
2. Press **C** or select **C-Cancel**.

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.



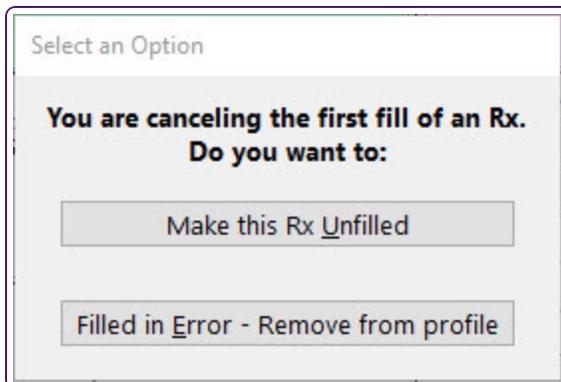
The image shows a dialog box titled "Confirm Rx" with a green header. The main text asks, "Are you sure you want to Cancel this Rx?". Below the text are three buttons: "Yes" (with a green checkmark icon), "No" (with a red prohibition sign icon), and "Cancel and Refill". The "No" button is highlighted with a blue dashed border.

- 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.



The image shows a dialog box titled "Select an Option". The main text reads, "You are canceling the first fill of an Rx. Do you want to:". Below the text are two buttons: "Make this Rx Unfilled" and "Filled in Error - Remove from profile".

- 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.

Confirm Cancel and Refill

Why are you canceling and refilling this Rx?

 **Clinical Changes**

Changes are required to the product, prescriber, quantity, directions, or other clinically-relevant information.

 **Billing Changes**

Changes are required to patient coverage, drug pack size, or other information that isn't clinically-relevant.

 *Data verification and packaging will not need to be re-performed*

- 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.

Tx	Status	Fill Date	Qty	Auth	Rem	Drug Name	Days	Cost	Markup	Total Fee	Total	Adherence
1000011	Reversal Pendi	17/07/2024	31	403	403	Synphasic 28	31	\$20.00	\$0.00	\$10.00	\$30.00	
1000010	Cancelled (Inac)	17/07/2024	31	403	403	Synphasic 28	31	\$16.32	\$0.00	\$10.00	\$26.32	
1000009	Cancelled (Inac)	17/07/2024	31	403	403	Synphasic 28	31	\$16.32	\$0.00	\$10.00	\$26.32	
1000008	Cancelled (Inac)	17/07/2024	31	403	403	Synphasic 28	31	\$16.32	\$0.00	\$10.00	\$26.32	

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.

Type	Sub Plan Code	Seq	Adj Date	Interventions	SSC	Pays	Adj State
Fill	PI	1	17/07/2024			\$0.00	Done
Can.	PI	1	17/07/2024			\$0.00	Not Adjudicated
Fill	Cash	2	17/07/2024			\$30.00	Done
Can.	Cash	2	17/07/2024			-\$30.00	Not Adjudicated

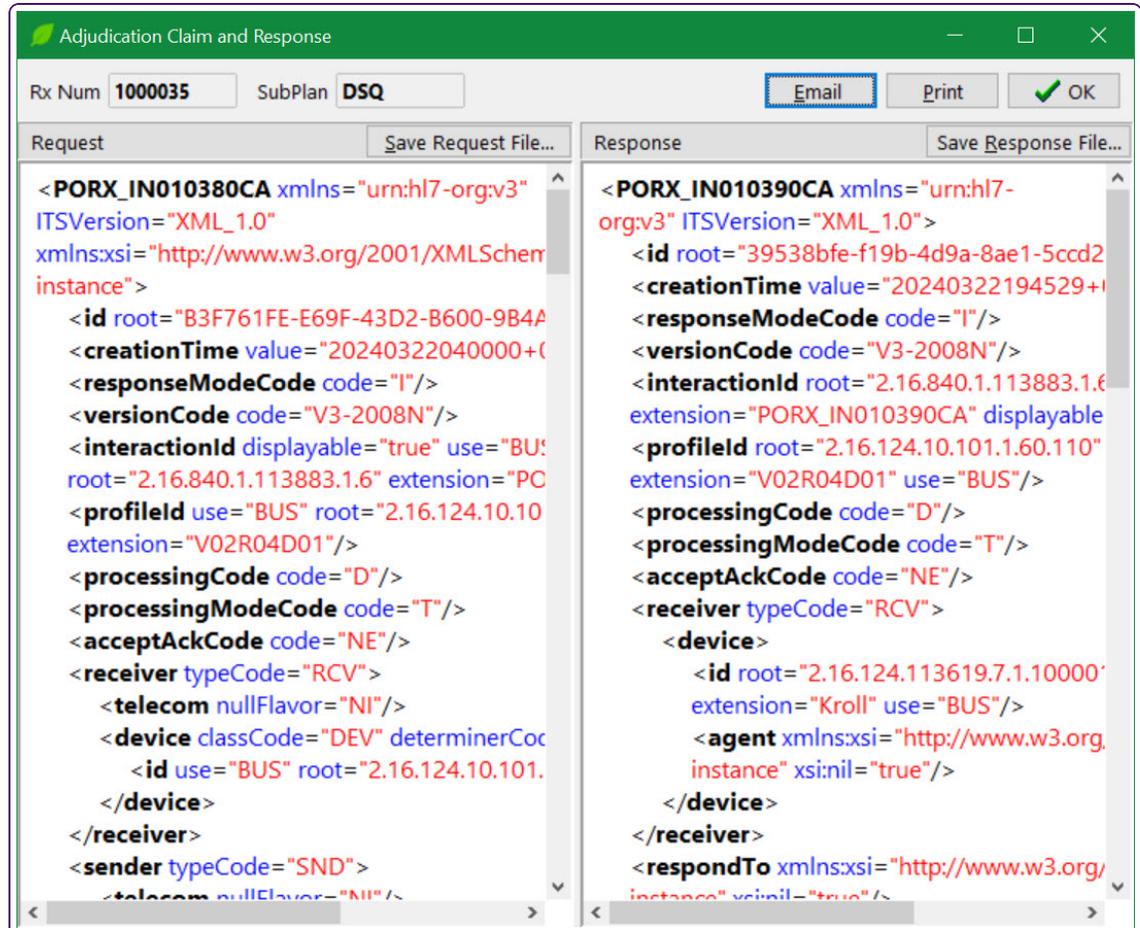
Cash rows identify patient pays amounts.

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.

Date/Time	Trace Num	Inter	Response	Errors	Details/Messages
17/07/2024 15:33:47	100066	Price Adjusted	CD		PLAN=XX S/A=N EXP= DRUG=00000.00ACC EXP=XXX...
17/07/2024 15:33:36	100065	Accepted			

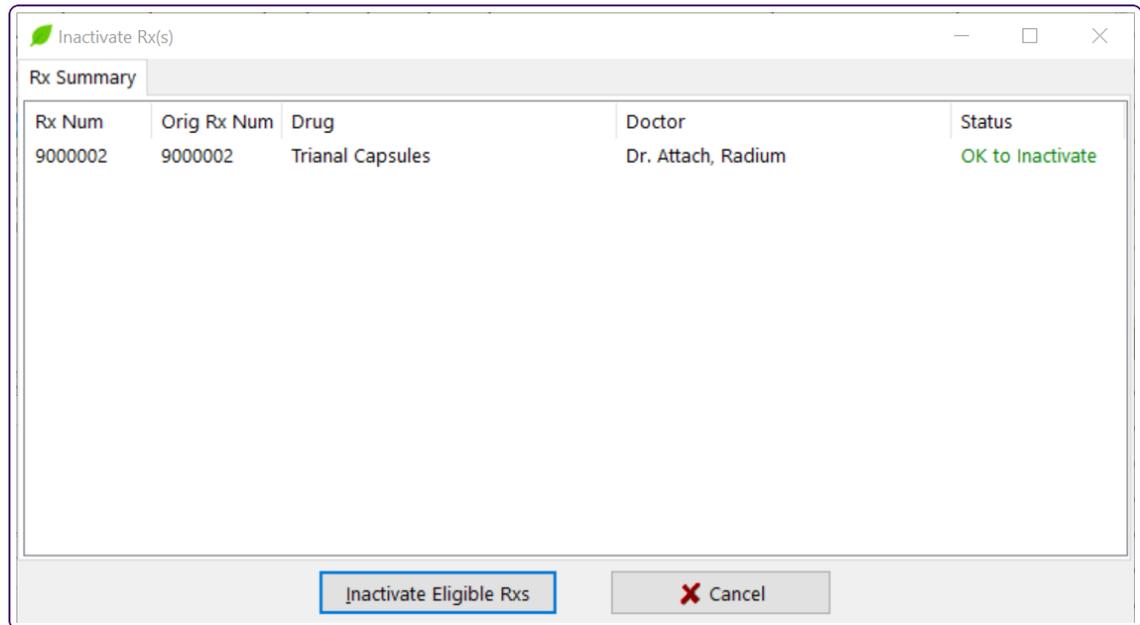
5. To display the **Adjudication Claim and Response Form**, press D or select **D-View Adjudication Detail**. The left side of the window, **Claim Values**, shows all the values being sent to the third party payer. The right side of the window, **Response Values**, shows all the values and messages sent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

The screenshot shows a patient profile for 'Slimmings, Spooling'. The 'Extra Functions' dropdown menu is open, listing various actions. The background interface includes tabs for 'All Rxs (8)', 'All Rxs', and 'Active Rxs'. Below the menu, there are sections for 'Allergies (0)', 'Medical Conditions (0)', and 'Groups (0)'. The 'General' tab is active, showing patient information like 'Active', 'Patient Type: Human', and 'Deceased On'. There are also sections for 'Prescriptions' and 'Consent'.

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**.

Status	Doctor	Patient	Rx Num	Last Fill	Qty	Brand Name	Comment	Resolved Comment
Call Doctor	Attach, Radium	Slimmings, Spooling	1000018	31/07/2024	12	ACH-Teriflunomide	14	
Call Doctor	Attach, Radium	Smith, Zoe	9000001	18/07/2024	60	AC&C Tablets	375/15	

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

Add to Manual NH Batch

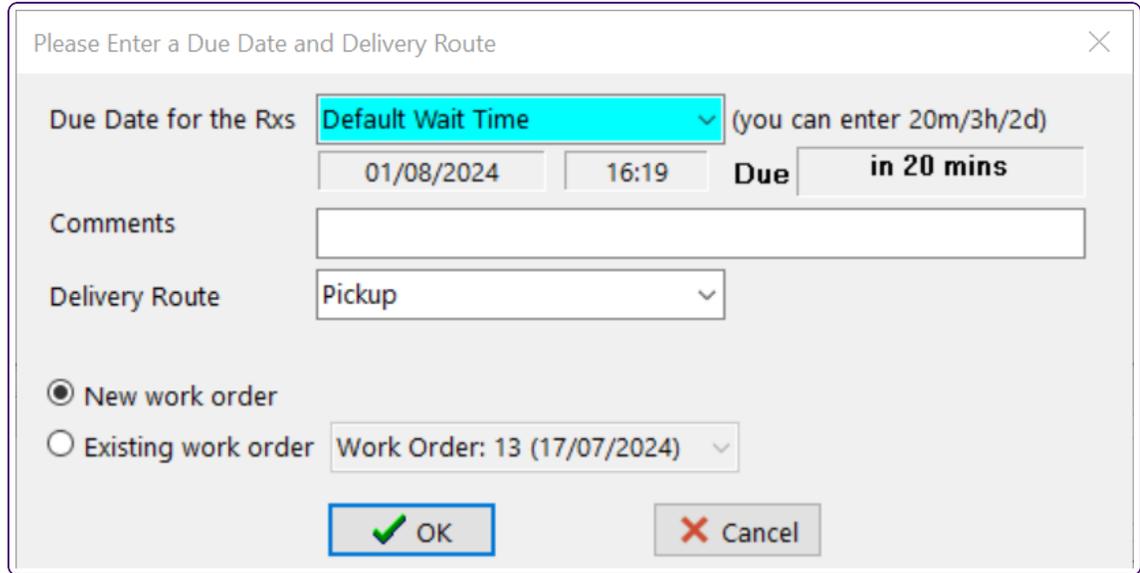
You can use the **Add to Manual NH Batch** function to add the selected Rx's to the batch order for the nursing home where the patient resides.

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.



The screenshot shows a dialog box titled "Please Enter a Due Date and Delivery Route" with a close button (X) in the top right corner. The dialog contains the following fields and options:

- Due Date for the Rxs:** A dropdown menu is set to "Default Wait Time" (highlighted in cyan). To its right is the text "(you can enter 20m/3h/2d)". Below this are two input fields: "01/08/2024" and "16:19". To the right of these is the label "Due" followed by another input field containing "in 20 mins".
- Comments:** A large empty text input field.
- Delivery Route:** A dropdown menu set to "Pickup".
- Work Order Type:** Two radio buttons are present: "New work order" (which is selected) and "Existing work order".
- Existing work order:** A dropdown menu set to "Work Order: 13 (17/07/2024)".
- Buttons:** At the bottom are two buttons: "OK" (with a green checkmark icon) and "Cancel" (with a red X icon).

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.

Err...	Status	Rx Num	Patient	Generic Name	Form	Message
	Open	1000060	Tagnaouti Moumnani	Alfuzosine 10mg	COM	Needs Repeats + Rx must be copied to new to add

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.

F3 - Patient		F5 - Drug		F7 - Doctor		F9 - Workflow		F10 - Pickup		F11 - Drop-off		F12 - New Rx		Alt+X - Start		
Last Name	Tagnaouti Mournani	First Name	Lili-Rose	Salutation		OK	Save	Cancel								
Profile - Same Therapeutic Class (2)												ESC - Back to Patient F - Refill R - Reprint D - Detail space- mark multiple Rxs M - Modify C - Cancel I - Inactivate				Extra Functions ▼
#	Status	Orig Rx	RxNum	Date	Ago	Qty	Auth	Rem	BrandName	Doctor	Sig					
1	Cancelled	1000019	1000028	09/02/2024	235	160	160	160	Jamp Tretinoin 10mg	Dumais, Guy	SIG					
2		1000017	1000018	08/02/2024	236	40	40	0	Vepesid 50mg	Dumais, Guy	SIG					

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**.

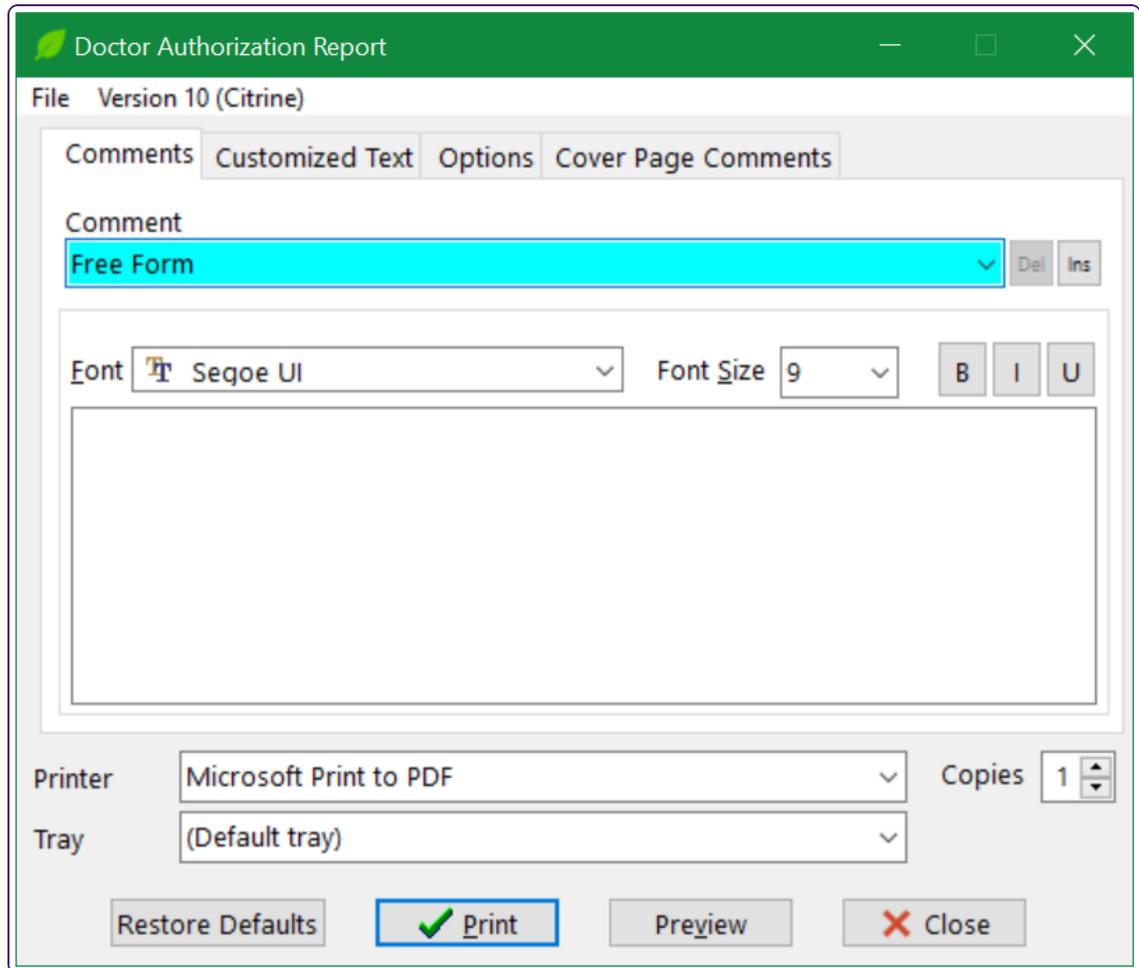
Request Renewal

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.

The screenshot shows a software window titled "Request Renewal" with a green header bar. Below the header, the text "Please specify how each renewal should be requested" is centered. The interface includes a patient name "Blondel, Élina" and a "Reason for renewal" text box. To the right of the text box is an "Urgent" checkbox. Below this, there are two dropdown menus: "[Rx] Aragon, José Vicente" and "Print Only: Bureau". A list of prescriptions is displayed, with the first entry being "12 Apo Erlotinib 100mg", "Rem: 0, Auth: 12", and "Aragon, José Vicente". Below the list is another "Reason for renewal" text box. At the bottom of the window, there are two buttons: "Request" (with a green checkmark icon) and "Close" (with a red X icon).

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 Rx's. 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.

Rx Num	Orig Rx Num	Drug	Doctor	Status
1000108	1000105	Apo Erlotinib 100mg	Dr. Aragon, José Vicente	This Rx is not completed.

- 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.

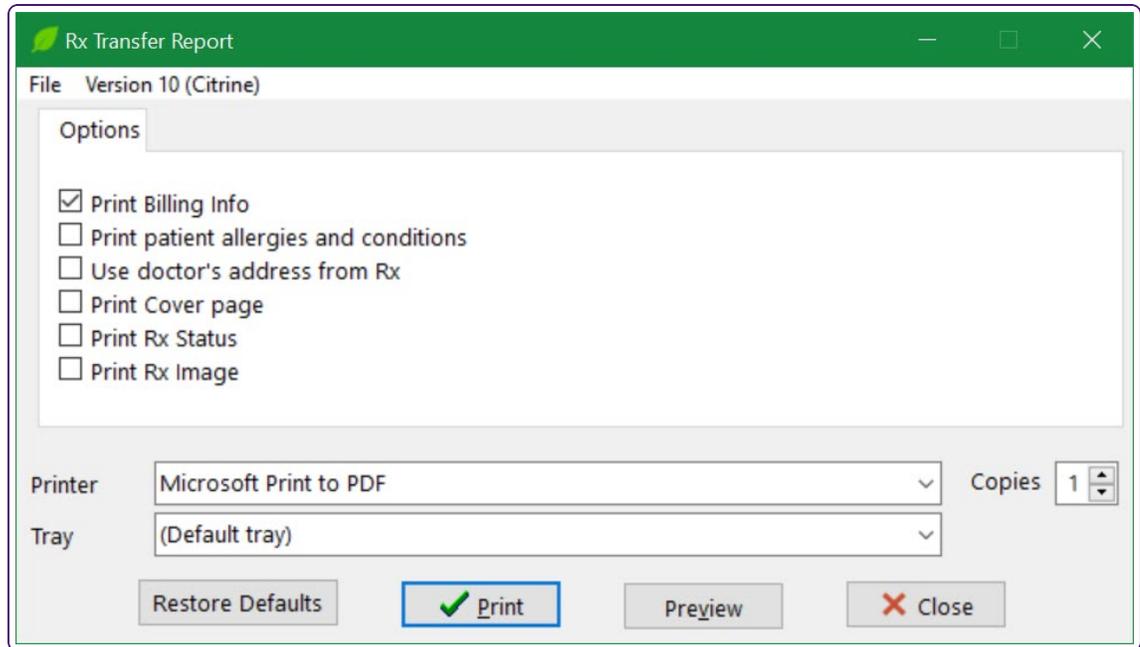
 To insert a new pharmacy record, select **New**, complete the **Create Store** form, then enter the pharmacy information and select **OK**.

- 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

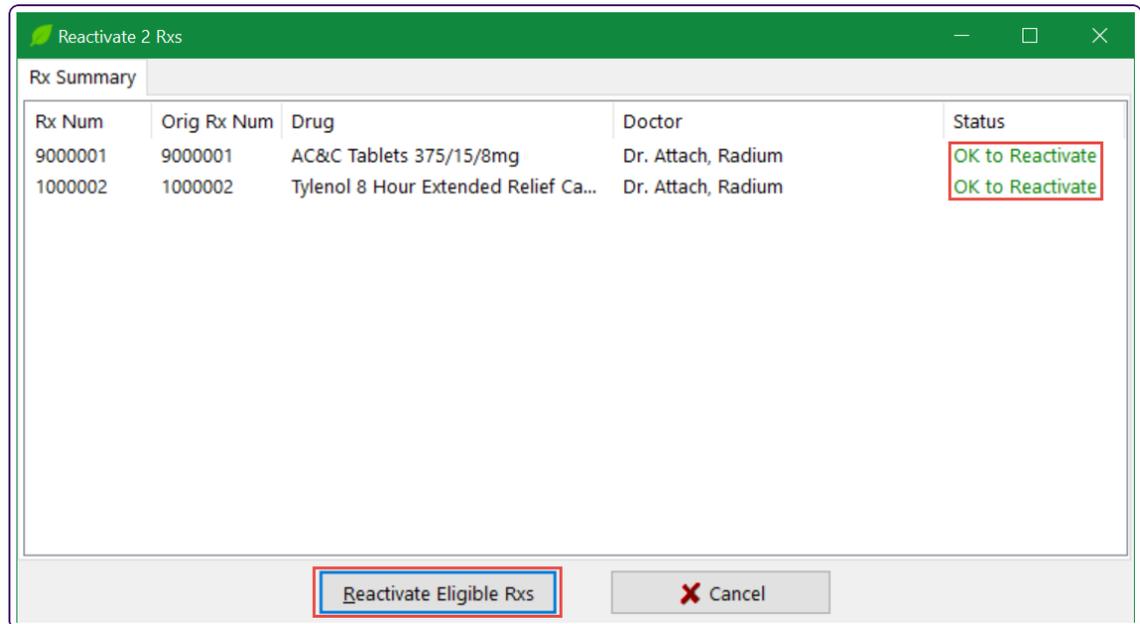
You can use the **Reactivate** function to reactivate inactive prescription(s). Be careful when reactivating a prescription; be sure you know why the Rx was inactivated to avoid dispensing errors.

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:

The screenshot shows the 'Suspend Rx(s)' window with the following fields and sections:

- Suspend Section:**
 - Date: 22/08/2024
 - Time: 10:45
 - Reason: (dropdown menu)
 - Comment: (text area)
- Resume Section:**
 - Date: (empty)
 - Time: (empty)
 - Reason: (dropdown menu)
 - Comment: (text area)
- Rx Summary:** Rx 1000018
- Rx Details:**
 - Orig Rx: 1000018
 - Drug: TAB ACH-Teriflunomide 14mg
 - Doctor: Dr. Attach, Radium
- Table:**

Suspend Date	Suspend Reason	Suspend Comment	Resume Date	Resume Reason	Resume Comment
- Message:** A suspend reason must be specified
- Buttons:** Suspend Eligible Rxs, Cancel

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:

Suspend Date	Suspend Reason	Suspend Comment	Resume Date	Resume Reason	Resume Comment
22/08/2024 10:45	Test				

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.

Suspend Date	Suspend Reason	Suspend Comment	Resume Date	Resume Reason	Resume Comment
22/08/2024 11:46	Admission to hospital				

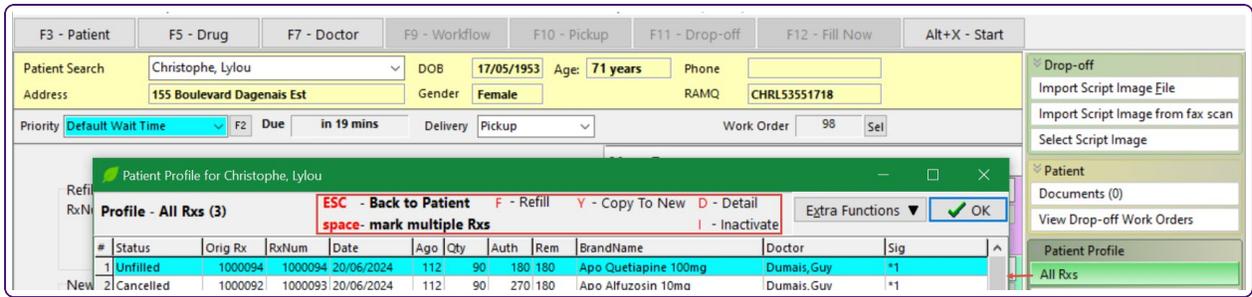
3. To edit an existing suspend/resume entry, double click the entry or highlight it and press F2.
The **Modify Suspension** window is displayed.

OK to modify.

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.

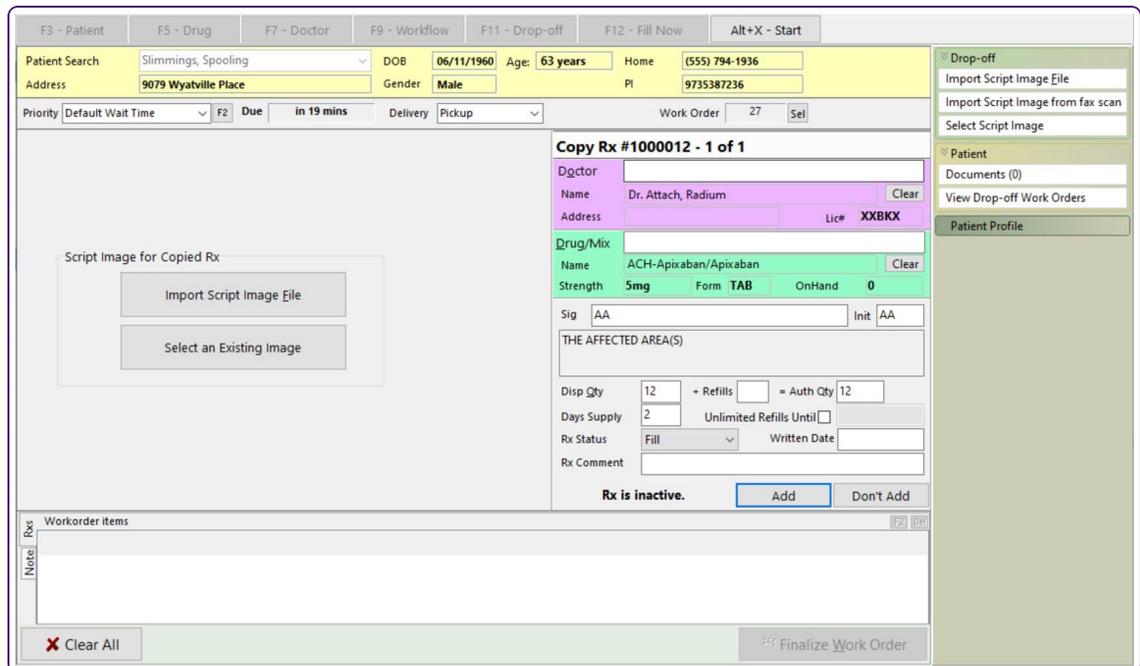


Command	Description
Esc	Back to patient.
Space	Mark Multiple Rxs
D	Detail prescription(s)
Y	Copy to new prescription
F	Refill prescription(s)
I	Inactivate prescription(s)

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.

The screenshot displays the 'F3 - Patient' window with the following sections:

- Header:** F3 - Patient, F5 - Drug, F7 - Doctor, F9 - Workflow, F11 - Drop-off, F12 - New Rx, Alt+X - Start
- Personal Information:**
 - Last Name: Slimmings, First Name: Spooling, Salutation: [Dropdown]
 - Address 1: 9079 Wyatville Place, Address 2: [Empty], City: Wigan, Postal: GSL 0B1, Country: Canada
 - Birthdate: 06/11/1960, Age: 63 years, Gender: Male, Language: English
 - Phone Numbers (1): Home (555) 794-1936
 - Height: [Empty], Weight: [Empty]
 - Family Doctor: [Empty]
 - PI: 9735387236
- Comments (0):** Table with columns Topic and Comment.
- Plans (1):**

SubPlan Code	Group ID	Client ID	Expiry
1 PI		9735387236	
- Medical Information:**
 - Allergies (0): Add Drug, F2, Ins, Del
 - Medical Conditions (0): F2, Ins, Del
 - Groups (0): F2, Ins, Del
- Family (3) / Nursing Home / Other:**
 - Patient: Active, Alt. Last Name: [Empty]
 - Patient Type: Human, Deceased On: [Empty]
 - Prescriptions: Delivery Type (Default (Pickup)), Delivery Route, Price Group (<None>), Drug line 1 (Default (Brand), Default (Generic)), Double Count (Not Required)
 - Consent: Privacy (Unknown), Unit Dose (Type: <None>, Cycle: <None>, Price Group: <Default> (<None>)), Rx Totals (Rx Count: 5, Dollar value: \$49,282.47, Reset date: [Empty]), Snap Caps (Requested: [Empty], Documented: 11)
- Right Sidebar (View):**
 - Profile: All Rxs, Active Rxs, Active Rxs w/Passtimes, Refillable Rxs, Pricing Profile, Not Disp./OTC Rxs, Rxs Filled in Error, Suspended Rxs, Transactions, Perform Clinical Analysis
 - View: Alternate Addresses, Appointments, Authorized Agents, Batches, Charting, Consents, Credit Cards, Documents (0), ERx Orders, History, Immunizations, Outbound Communications, Professional Services (1), Rx Counseling History, Rx Notes, Special Authority Drugs, To Do Items, Work Orders

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.

The screenshot shows the 'Alternate Patient Addresses' window with the following fields and options:

- Location:** A text input field, currently highlighted in cyan.
- Company:** A text input field.
- Care of:** A text input field.
- Address 1:** A text input field.
- Address 2:** A text input field.
- City:** A dropdown menu.
- Prov:** A dropdown menu set to 'BC'.
- Postal:** A text input field.
- Country:** A dropdown menu set to 'Canada'.
- Phone:** A text input field.
- Ext:** A text input field.
- Fax:** A text input field.
- Ext:** A text input field.
- Use for billing:** An unchecked checkbox.
- Use for delivery:** A dropdown menu set to 'No'.
- Delivery route:** A dropdown menu set to '<None>'.
- Delivery service:** A dropdown menu set to '<None>'.
- Hold-at-location code:** A text input field.
- Default local delivery by:**
 - Route:** A text input field.
 - Service:** A text input field.
- Buttons:** 'Save' (with a green checkmark icon) and 'Cancel' (with a red X icon).

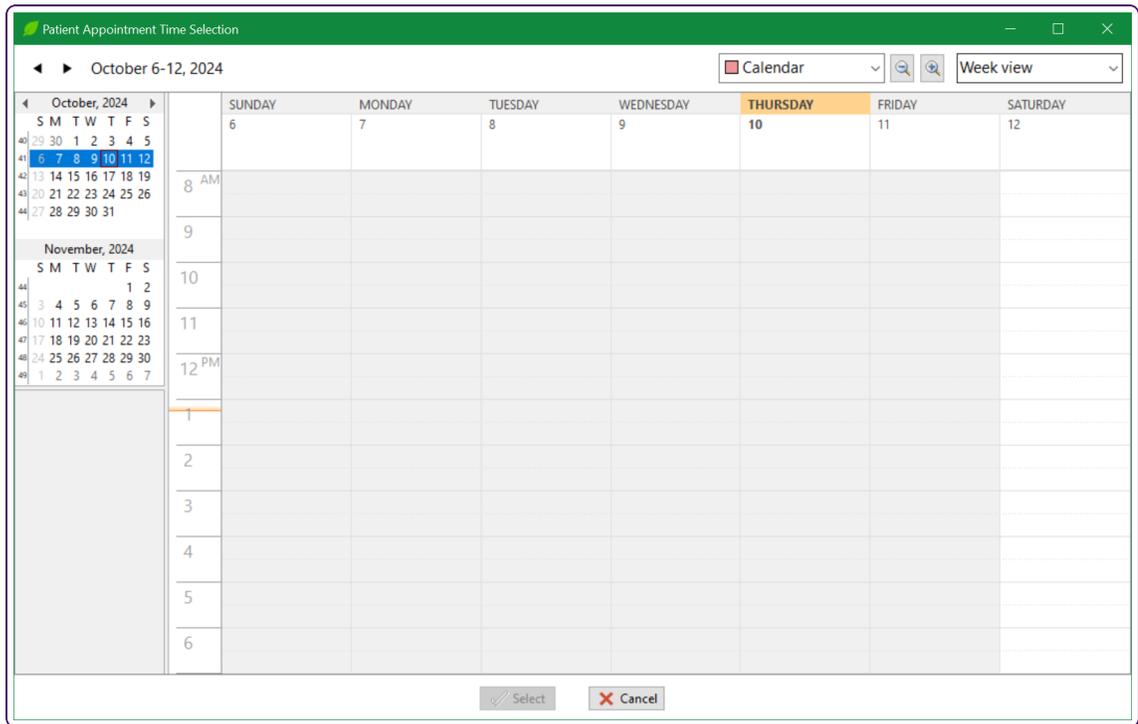
3. In the **Location** field, add a description of the new address, such as summer home or parent's home.
4. Complete the rest of the fields as required, then select **Save**.

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.

Status	Invoice #	Date	RxNum	Patient Name	Comment	GL Category	TaxType	Amount
Open	1	10/10/2024		Blondel, Élina		Charge	GST	\$12.00

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.

The screenshot shows a window titled "Authorized Agent" with the following fields and options:

- Last Name:** Duchemin
- First Name:** Morgan
- Authorized by:** Blondel, Élina
- Date:** 10/10/2024
- Relationship:** (Dropdown menu)
- Address 1:** 211 Rang 1e-Et-2e Ouest
- Address 2:** (Empty field)
- City:** La Corne
- Prov:** Qc
- Postal:** JOY 1R0
- Country:** Canada
- Phone:** (Empty field)
- Ext:** (Empty field)
- Authorization expires:** (Empty field)
- Comment:** (Text area)
- Permissions:**
 - (Select all)
 - View Rxs
 - Order or pickup Rxs
 - Receive counselling on patient's behalf
 - Request reports
 - View accounts receivable
 - Add, view or cancel appointments
 - Change demographics (name, address, phone, dob, etc)
 - Change plans
 - Change packaging preferences
 - Sign legal documents
 - Authorize or revoke agents

Buttons: Save, Cancel

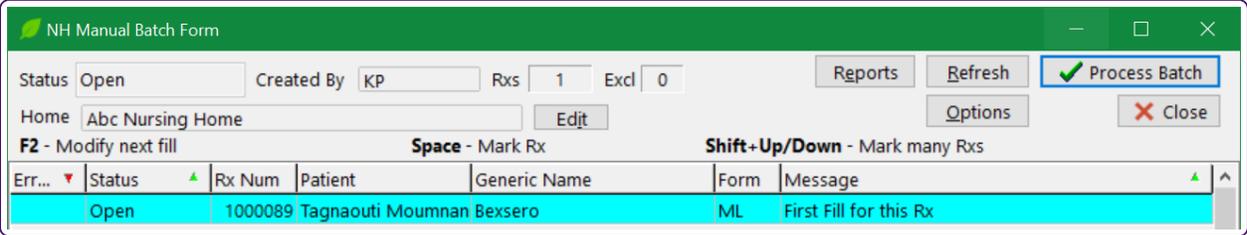
Batches

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.

The screenshot shows a window titled "Batches" with the following table:

Batches			
Type	NH Manual	<input checked="" type="checkbox"/> Active Only	
Items (1)			
Batch Date	Name	Status	BatchType
	Abc Nursing Home	Open	NH Manual

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 screenshot shows a patient profile form for 'Slimmings, Spooling'. The form includes fields for address, phone numbers, birthdate, age, gender, language, height, and weight. A 'Charting' section is visible at the bottom, showing 'Weight 125.0 lbs' and 'Height 60.0 in'. A green button labeled 'Add other reading' with a plus sign is highlighted.

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

The screenshot shows the 'Edit Charting Record' popup for 'Alanine Aminotransferase'. The form includes fields for 'Date' (11/10/2024), 'Specimen' (Serum), and 'Source'. The 'ALT' value is entered as 'U/L'. A green 'Save' button and a grey 'Cancel' button are at the bottom.

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.

The screenshot shows the 'Consent' window with a table of consent records. The table has columns for Type, Description, Consent, and Consent Date. One record is shown: 'Antiviral Consent' with a status of 'Unknown'.

Type	Description	Consent	Consent Date
Antiviral Consent		Unknown	

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](#).

Credit Cards			
Items (1)			
Debit Type	Card Type	Account Number	Expiry
EFT		103-102-XXXXXXXXXXXX21	

Cartes de crédit			
Items (1)			
Type de débit	Type de carte	Numéro de compte	Expiration
EFT		103-102-XXXXXXXXXXXX21	

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, .xlsx, and .jpeg.

Documents			
<input type="text"/>			Filter
Items (1)			
Title	By	Document Type	Created
info.png	AA	Manual Import	22/08/2024

ERx Orders

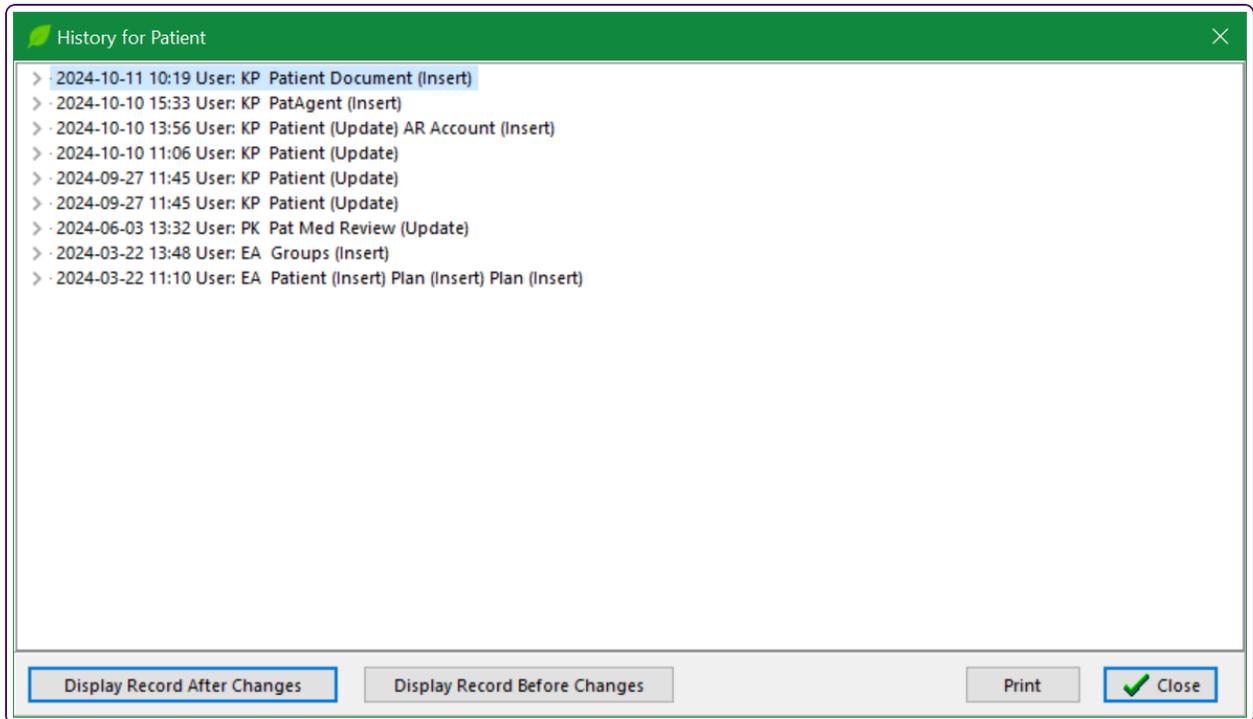
You can use the **ERx Orders** function to view and action prescription orders that were sent from an external application, such as PrescribeIT.

ERx Orders					
<input type="checkbox"/> Show Outgoing Orders			D - View Order F - Process Order		
Origin	Date	Type	Status	Doctor	Drug

- 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.

Immunizations							
N - New Immunization		P - Print/Reprint		F - Call up		C - Cancel Claim	
D - Pharmacist Declined		R - Patient Refused		W - Print Wallet Card		Show Reversals <input type="checkbox"/>	
Extra Functions ▼							
Items (2)							
#	Type	Drug Name	Status	Product Status	Fee Status	Created ▼	Completed ▲
12	Non-Influenza		Refused by Patient	No Product Applicable	No Fee Applicable	11/10/2024	11/10/2024
11	COVID19		Pending	Not Completed Yet	No Fee Applicable	11/10/2024	

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.

The screenshot shows the 'Outbound Communications' interface. At the top, there are tabs for 'Communication Methods', 'Pending', 'Processing', and 'Completed'. Below this, there are dropdown menus for 'Refill Type' (set to 'Unknown'), 'Pickup' (set to 'Unknown'), and 'Spoken Language'. The main area displays three communication methods: 'E-mail' (test@test.com), 'Phone' ((613) 555-5555), and 'SMS' ((613) 555-1234). Each method has edit and delete icons. A large green 'Add contact' button with a plus sign is located at the bottom right.

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.

The screenshot shows the 'Professional Services' interface. At the top, there are several action buttons: 'N - New', 'P - Print/Reprint', 'F - Call up', 'C - Cancel Claim', 'D - Pharmacist Declined', 'R - Patient Refused', and 'W - Follow-ups'. There is also a 'Show Reversals' checkbox and an 'Extra Functions' dropdown menu. Below this is a table with the following data:

Type	Status	Fee Status	Created	Completed
Minor Ailment	Pending	Review Not Completed Yet	11/10/2024	

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.

The screenshot shows the 'Rx Counseling History' interface. At the top, there is a 'Type' dropdown menu set to '<All>'. Below this is a table with the following data:

Counseling Date	Pharmacist	RxNum	Drug Name	Type
29/11/2024	Kroll Pharmacist	1000112	Apo Ramipril 2.5mg	Accepted

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 Rx's. 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 <input type="text" value="Current"/> + <input type="text" value="0"/> days F2 Ins Del					
Items (2)					
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	

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)

#	▲ BrandName	GenericName	Strength	Pack Size	DIN	Form	Manufacturer
1	Apo-Metformin	Metformin Hydrochloride	500mg	360	02167786	TAB (Ta APX (Apotex Inc	

3. Double click the drug record.

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

The screenshot shows the 'F5 - Drug' window with the following details:

- Name:** Apo-Metformin
- DIN:** 02167786
- Generic:** Metformin Hydrochloride
- Strength:** 500mg
- Sched:** 1 (Schedule 1 (F))
- Description:** White Round Tab Apo M/500
- Form:** TAB (Tablet)
- Route:** Oral (Default)
- Manufacturer:** APX (Apotex Incorporated)
- Drug Card Type:** Default
- Drug Sub:** Tablet
- UPCs:** 100, 360, 500
- Pack Size:** 360
- Purchase Price:** \$9.61
- UPC:** 771313169646

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 screenshot shows the 'Alt - X Start' window with the following elements:

- Menu:** File, Edit, Recent, Reports, Utilities, NH, Cards, Session, Help, Versic
- Navigation Buttons:** F3 - Patient, **F5 - Drug**, F7 - Doctor, F9 - Workfl
- Search Results:** Apo-Metformin, 500/360
- Last Rx Numbers:** Regular (1000018), Narcotic (9000002)
- Dashboard:** 11
- Callbacks:** 2

The list of matching drugs is displayed.

- 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 screenshot shows the F5 - Drug window with the following details:

- Search Criteria: Apo-Metformin
- Searching By: Brand(Generic) Name (Advanced)
- Records Found: 8

#	BrandName	GenericName	Strength	Pack Size	DIN	Form	Manufacturer
1	Apo-Metformin	Metformin Hydrochloride	850mg	100	02229785	TAB (Ta APX (Apotex Inc	
2	Apo-Metformin	Metformin Hydrochloride	850mg	500	02229785	TAB (Ta APX (Apotex Inc	
3	Apo-Metformin	Metformin Hydrochloride	500mg	100	02167786	TAB (Ta APX (Apotex Inc	

- The F5 - Drug window is displayed.

Method 3: From the F11 - Drop-Off window

- From the F11 - Drop-Off window, search for and select the applicable patient.
- 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.

The screenshot shows the F11 - Drop-Off window with the following details:

- Patient Search: Smith, B
- Address: 3 Main Street
- DOB: [Blank]
- Age: [Blank]
- Home: (555) 555-5555
- Gender: [Blank]
- Plan: [Blank]
- Priority: Default Wait Time
- Due: in 19 mins
- Delivery: Pickup
- Work Order: 28
- Drug/Mix: Apo*
- Strength: [Blank]
- Form: [Blank]
- OnHand: 0
- Sig: [Blank]
- Init: AA
- Disp Qty: [Blank]
- + Refills: [Blank]
- = Auth Qty: [Blank]
- Days Supply: [Blank]
- Unlimited Refills Until: [Blank]
- Rx Status: Fill
- Written Date: [Blank]
- Rx Comment: [Blank]

- 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 inactive 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:

The screenshot shows the F5 - Drug window for Apo-Abacavir. The 'Pack Active' checkbox is checked. The window is divided into several sections: General (Name, Strength, Form, Route, Manufacturer), Labels / Workflow Packaging (Drug line 1, Drug line 2, Half-size Sig), Comments (0), Groups (0), and Packs (1). The 'Pack Active' checkbox is highlighted with a red box.

Creating a new drug record

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

The screenshot shows the search criteria window. The 'Insert' button is highlighted with a red box. The search criteria are 'wec*' and the search results show '0 No Records Found'. The 'Advanced Search' section is also visible.

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

The screenshot shows the 'Enter Pack Size' dialog box. The dialog box prompts the user to enter a pack size for the new drug. The 'OK' button is highlighted with a green box.

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

- 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.

The screenshot shows the F5 - Drug window with search criteria 'wec*' and 'Copy Drug' button highlighted. A second search window is open for 'apo*' showing search results for Abacavir.

#	BrandName	GenericName	Strength	Pack Size	DIN	Form	Manufacturer
1	Apo-Abacavir	Abacavir Sulfate	300mg	60	02396769	TAB (T APX (Apotex I	
2	Apo-Abacavir-Lamivudine	Abacavir/Lamivudine	600/300mg	30	02399539	TAB (T APX (Apotex I	
3	Apo-Abacavir-Lamivudine-Zid	Abacavir/Lamivudine/Zidovudine	300/150/300mg	60	02416255	TAB (T APX (Apotex I	

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: <ul style="list-style-type: none"> ■ 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.	<p>The marketing message for the drug.</p> <p>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.</p> <p>Marketing messages are configured by the head office.</p>
Fee for Svc.	<p>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.</p> <p>Fee For Service entries are configured by the head office.</p>
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.

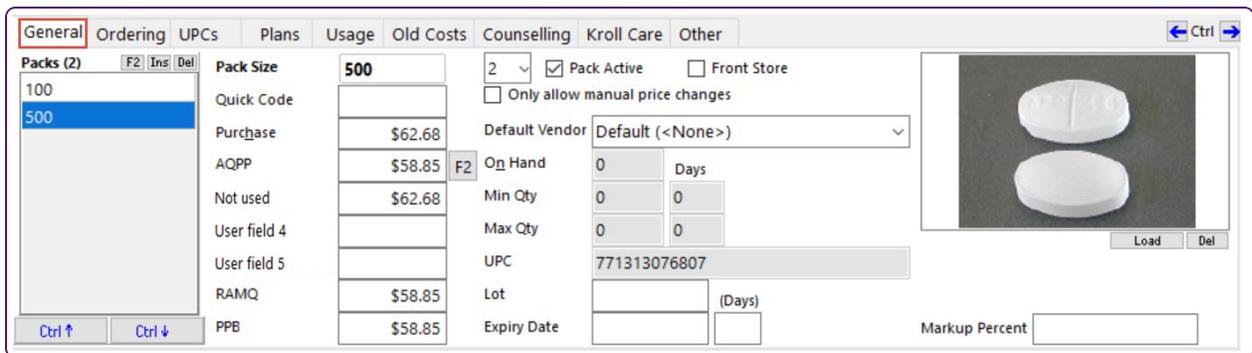
Name	Description
Print compliance calendar	If selected, a calendar of empty boxes appears for the patient to use to document the doses they have taken.
Eligible for Coupon	If selected, the configured coupon is printed when the prescription is filled. Coupons are configured by home office
Flavor Rx	If 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	<p>Any comments about the drug record.</p> <p>Comments are entered from the Comments pop-up:</p> <ul style="list-style-type: none"> ■ 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	<p>The group or groups the drug belongs to, if applicable.</p> <p>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.</p> <p>Drug Groups are created by head office and can be applied to any number of drug records.</p>
View Reason Codes	<p>Select to display Reason Codes and Reason Code descriptions for Limited Use products. You can also print Reason Code information from the window.</p> <p>This button is only applicable to Ontario pharmacies.</p>

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	<p>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.</p> <p>The Days field display the minimum number of days' supply that triggers reordering and is related to Min Qty through a calculated formula.</p> <p>Min Qty is required for perpetual inventory.</p>
Max Qty	<p>Is used to calculate how much of the drug product should be reordered.</p> <p>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.</p> <p>The Days field displays the maximum days' supply a store should have on hand and is related to Max Qty through a calculated formula.</p> <p>Max Qty is optional for perpetual inventory; when the field is empty the system will always order 1 package of the drug pack.</p>
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	<p>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.</p> <p>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.</p> <p>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.</p>
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	<p>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.</p> <p>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.</p>
Place Order	<p>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.</p> <p>For more information, see "Order Drug" (page 129).</p>
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.

Type	UPC	Default	Multiplier	Comment
UPC	056100024637	Yes	1	

Plans

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

Plan Name	PackSize	Default	Covered	Pseudo DIN	Description	Bill As Pack
PI - BC Pharmacare		Yes	No		Default	No
PB - BC Pharmacare		Yes	No		Default	No
PC - BC Pharmacare		Yes	No		Default	No
PA - BC Pharmacare		Yes	No		Default	No
PZ - BC Pharmacare		Yes	No		Default	No

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.

The screenshot shows the 'Drug-Plan Information' dialog box. The title bar is green with a leaf icon and the text 'Drug-Plan Information' and a close button. The main area contains several fields: 'SubPlan' is a dropdown menu showing 'PI - BC Pharmacare (Plan I)'; 'Pack Size' is a dropdown menu showing '<All>' with a 'Default' checkbox checked; 'Description' is a text box containing 'Default'; 'PDIN - Pseudo DIN' is a dropdown menu with an empty text box next to it and a 'Covered' checkbox unchecked; 'Bill As Pack' is a checkbox that is unchecked; 'Intervention' is a dropdown menu showing '<None>'. At the bottom are 'OK' and 'Cancel' buttons.

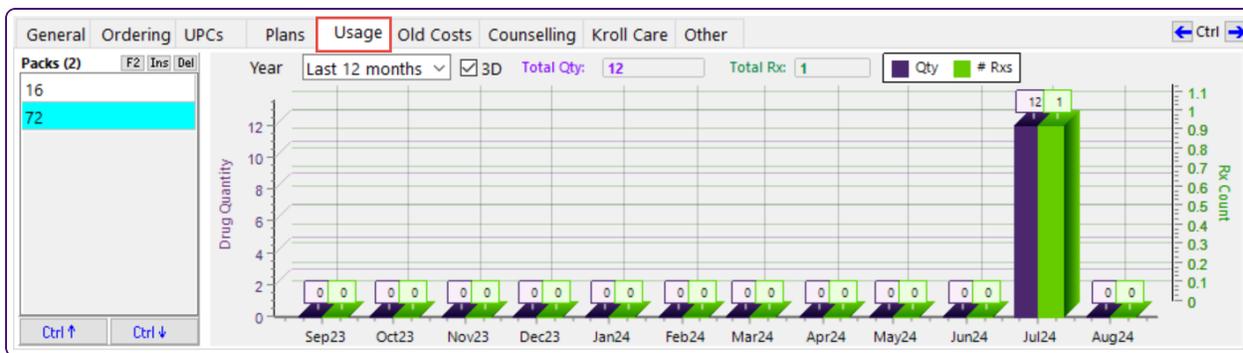
From the **Drug-Plan Information** window, you can see which pack sizes the pseudo DIN is being applied to. If the **Default** checkbox is selected, the pseudo DIN is automatically sent to the third party during adjudication; if it is not selected, the DIN on the drug record is sent to the third party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

	Current Costs	Old Cost	Changed On	Changed By
Purchase	\$12.46	\$10.89	17/07/2023 18:47:55	HeadOffice
Selling	\$8.51	\$7.77	01/08/2007 14:36:05	HeadOffice
User Cost 1	\$7.77			
User Cost 4				
User Cost 5				
User Cost 2				
User Cost 3				

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**.

Patient Messages

- Do not chew or crush. OK to split tablet if scored
- Do not use more often than advised
- Do not take more medicine than is recommended
- Avoid drinking alcohol
- Do not use with other acetaminophen products.
- Check warnings on OTC medications.
- Call doctor if you are not getting better
- Skip missed dose if almost time for next dose

Professional Messages

- Do not chew or crush tablets.OK to divide before swallowing if scored
- Use exactly as directed by the packaging information

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.

The screenshot shows a software window with a tabbed interface. The 'Kroll Care' tab is selected and highlighted with a red box. The content of the tab is displayed on a light blue background and includes the following text:

Brand Name: LIPITOR 80 MG TABLET DIN:02243097
Generic Name: Atorvastatin Calcium
ATORVASTATIN - ORAL
 (a-TOR-va-STAT-in)

USES
 Atorvastatin is used along with a proper diet to help lower "bad" cholesterol and fats (such as LDL, triglycerides) and raise "good" cholesterol (HDL) in the blood. It belongs to a group of drugs known as "statins." It works by reducing the amount of cholesterol made by the liver. Lowering "bad" cholesterol and triglycerides and raising "good" cholesterol decreases the risk of heart disease and helps prevent strokes and heart attacks. In addition to eating a proper diet (such as a low-cholesterol/low-fat diet), other lifestyle changes that may help this medication work better include exercising, losing weight if overweight, and stopping smoking. Consult your doctor for more details.

HOW TO USE

Other tab

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

The screenshot shows a software window with a tabbed interface. The 'Other' tab is selected and highlighted with a red box. The content of the tab includes the following fields:

User Field 1
 User Field 2
 User Field 3

Created On
 Changed On
 Last Rx On

Refill/Renewal Reminders Allowed

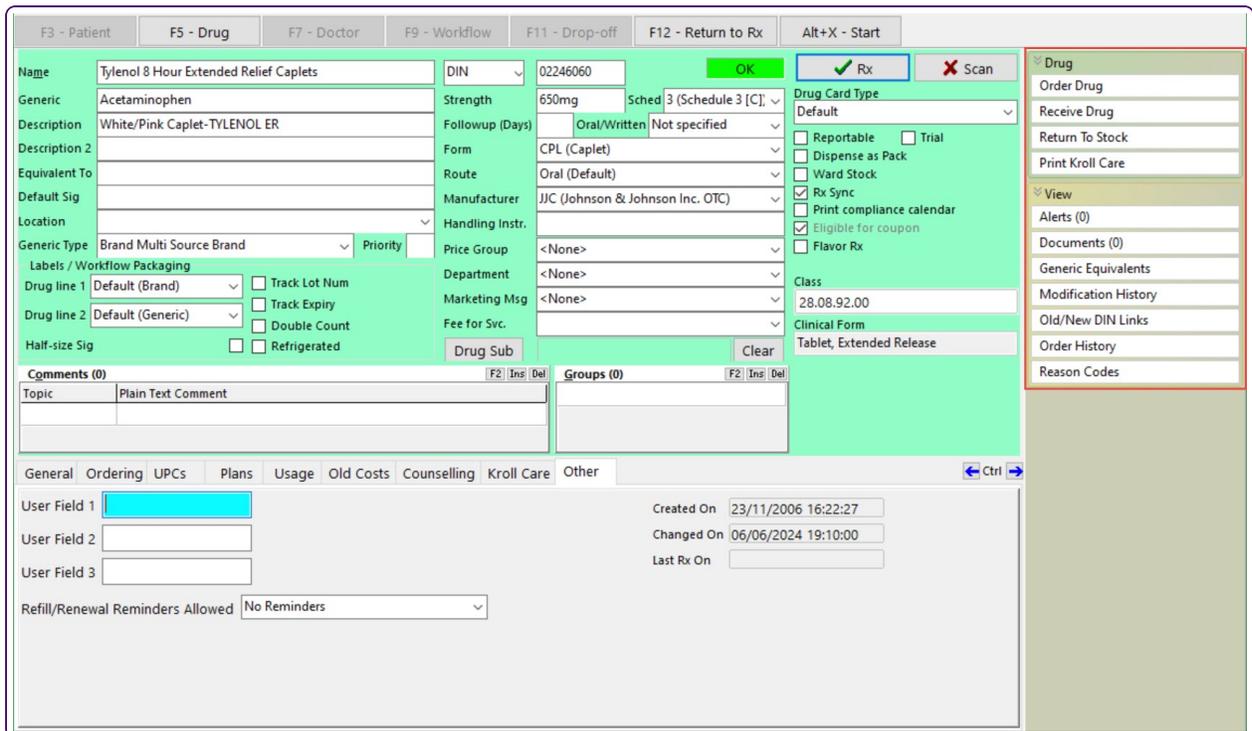
The following table describes the fields on this tab.

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.



The screenshot displays a software interface for managing drug records. At the top, there are navigation tabs: F3 - Patient, F5 - Drug (selected), F7 - Doctor, F9 - Workflow, F11 - Drop-off, F12 - Return to Rx, and Alt+X - Start. The main area is divided into several sections:

- Drug Information:** Name (Tylenol 8 Hour Extended Relief Caplets), DIN (02246060), Strength (650mg), Sched 3 (Schedule 3 [C]), Description (White/Pink Caplet-TYLENOL ER), Form (CPL (Caplet)), Route (Oral (Default)), Manufacturer (JJC (Johnson & Johnson Inc. OTC)), Price Group (<None>), Department (<None>), Marketing Msg (<None>), Fee for Svc. (<None>), Drug Sub (Tablet, Extended Release).
- Workflow Packaging:** Labels / Workflow Packaging, Drug line 1 (Default (Brand)), Drug line 2 (Default (Generic)), Half-size Sig, Track Lot Num, Track Expiry, Double Count, Refrigerated.
- Comments (0):** Topic (Plain Text Comment).
- Groups (0):** F2 | Ins | Del.
- Drug Card Type:** Default, Reportable, Trial, Dispense as Pack, Ward Stock, Rx Sync, Print compliance calendar, Eligible for coupon, Flavor Rx.
- Class:** 28.08.92.00.
- Clinical Form:** Tablet, Extended Release.

At the bottom, there are tabs for General, Ordering, UPCs, Plans, Usage, Old Costs, Counselling, Kroll Care, and Other. The General tab is active, showing User Field 1, 2, and 3, Created On (23/11/2006 16:22:27), Changed On (06/06/2024 19:10:00), Last Rx On, and Refill/Renewal Reminders Allowed (No Reminders).

On the right side, there is a sidebar with the following sections:

- Drug:** Order Drug, Receive Drug, Return To Stock, Print Kroll Care.
- View:** Alerts (0), Documents (0), Generic Equivalents, Modification History, Old/New DIN Links, Order History, Reason Codes.

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 can also select the **Place Order** button on the **Ordering** tab.

The **Place Order** window is displayed.

The screenshot shows a 'Place Order' dialog box with the following fields and values:

Vendor	Pack Size	Item Num
[Redacted]	72	771543
TYLENOL MUSCLE ACHES & BODY PAIN TB 72		
Order Quantity	Case Qty	Catalog Price
[Empty] (# Items)	1 (Packs)	12.46
Order Date	Total Price	
23/08/2024	\$0.00	

Buttons: **Save** (green checkmark) and **Cancel** (red X).

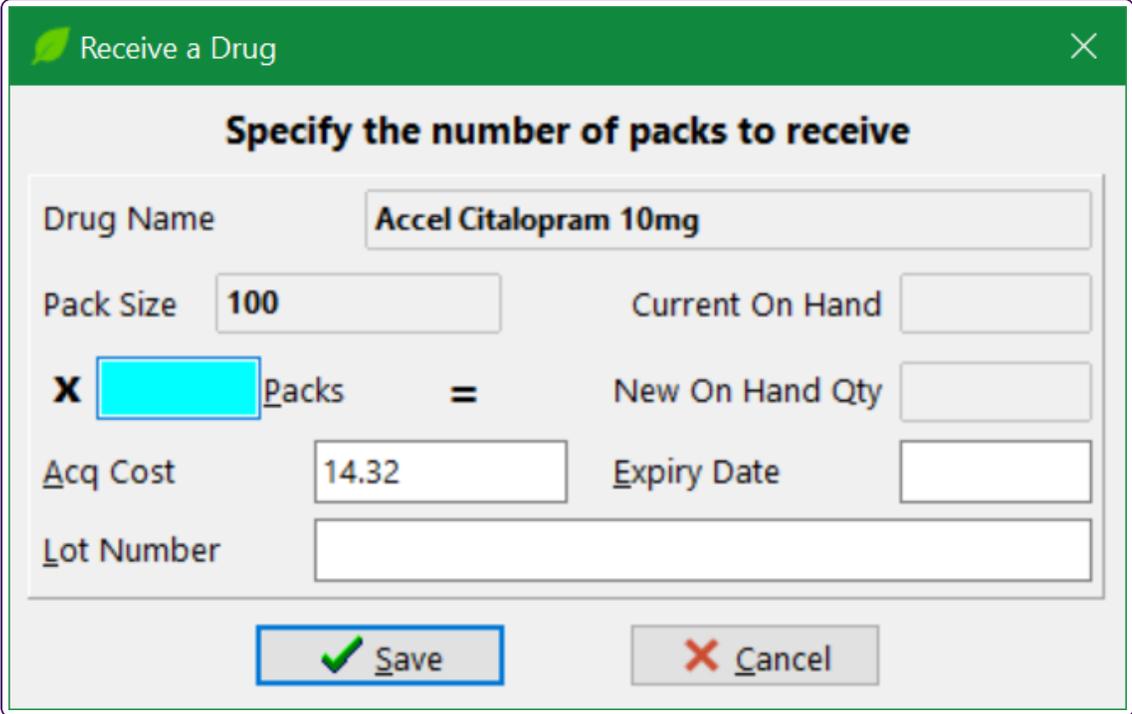
2. Select the **Vendor**.
3. Enter the **Order Quantity** and **Order Date**.
4. Select **Save**.

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.



Receive a Drug [X]

Specify the number of packs to receive

Drug Name

Pack Size Current On Hand

X Packs = New On Hand Qty

Acq Cost Expiry Date

Lot Number

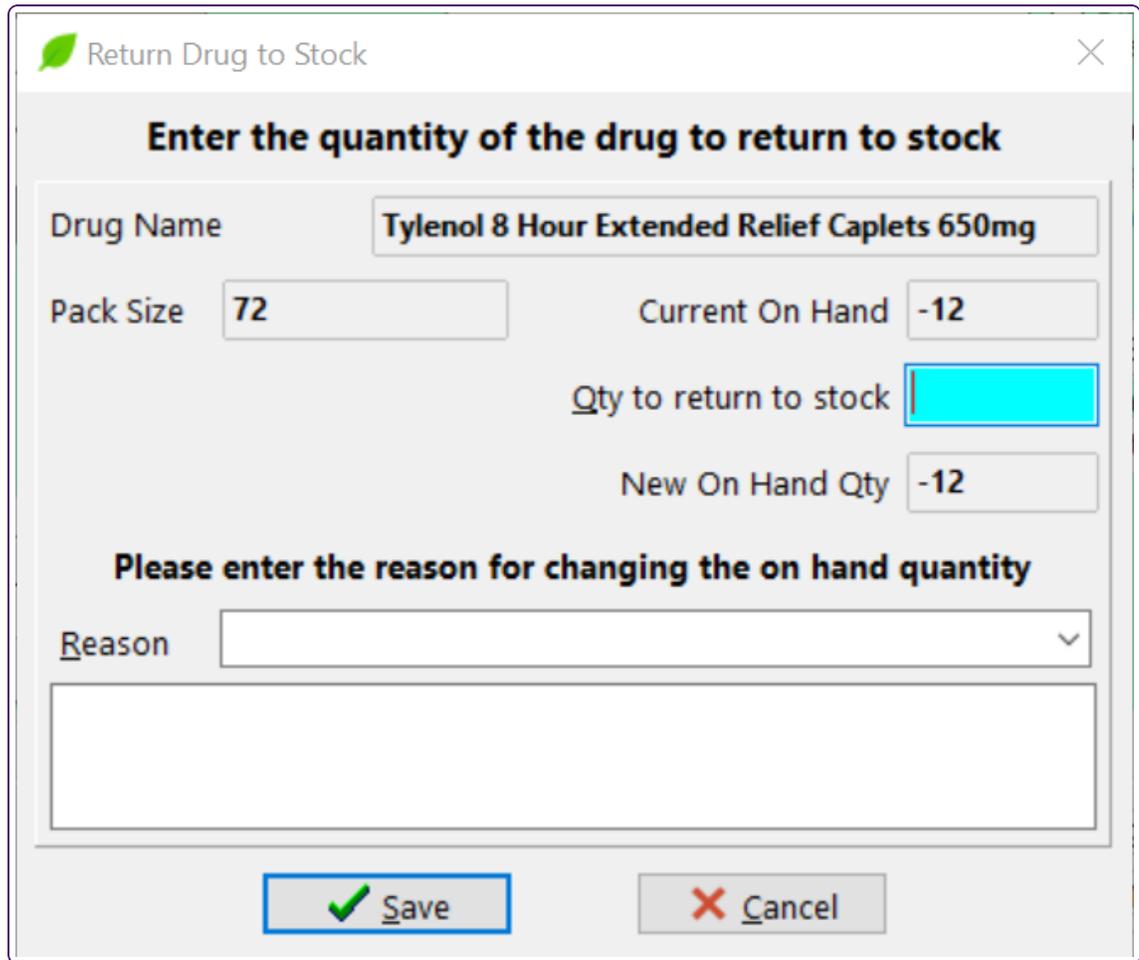
2. Enter the number of **Packs** received, the **Lot Number**, and the **Expiry Date**.
3. Select **Save**.

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.



The screenshot shows a pop-up window titled "Return Drug to Stock" with a close button (X) in the top right corner. The main heading inside the window is "Enter the quantity of the drug to return to stock". Below this heading, there are several input fields: "Drug Name" with the value "Tylenol 8 Hour Extended Relief Caplets 650mg"; "Pack Size" with the value "72"; "Current On Hand" with the value "-12"; "Qty to return to stock" which is currently empty and highlighted in cyan; and "New On Hand Qty" with the value "-12". Below these fields, there is a section titled "Please enter the reason for changing the on hand quantity" with a "Reason" dropdown menu and a large text area for entering the reason. At the bottom of the window, there are two buttons: "Save" (with a green checkmark icon) and "Cancel" (with a red X icon).

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	
Tylenol 8 Hour Extended Relief Caplets 650mg CPL	DIN 02246060
Acetaminophen (a-SEET-a-MIN-oh-fen)	23-Aug-2024

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 -

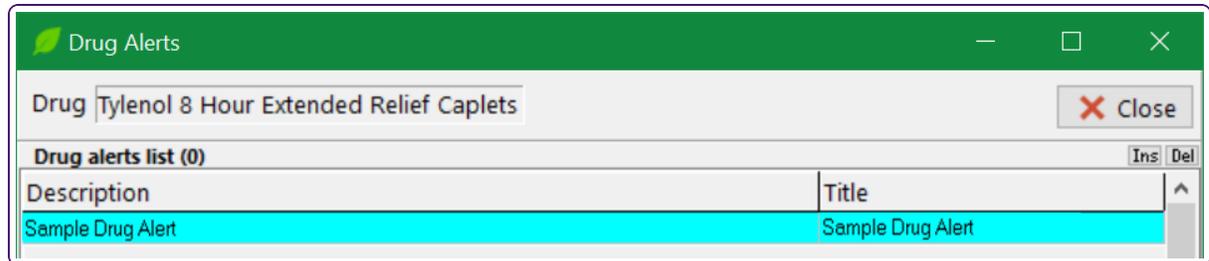
Page 1 of 2

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.

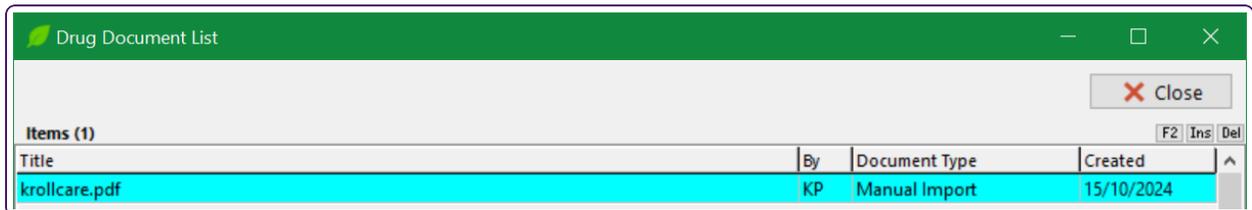
Drug alerts are added by head office and can be found under **Edit > Lists > Drug Alerts**.

- 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

Drug Formulary						
Atorvastatin Calcium 80mg TAB (Tablet)						
Pri	DIN	Drug	Manufacturer	Unit Cost	On Hand	Extra Info
	02411385	Atorvastatin-80 80mg	SIV (Sivem Pharmaceutic	0.2529	0	
	02392976	Mylan-Atorvastatin 80mg	MYL (Mylan Pharmaceuti	0.2529	0	
	02348748	Atorvastatin 80mg	SNS (Sanis Health Inc.)	0.2529	0	
	02417960	Reddy-Atorvastatin 80mg	DRR (DR Reddys Labora	0.2529	0	
	02454041	Mar-Atorvastatin 80mg	MAR (Marcan Pharmace	0.2529	0	
	02346516	Atorvastatin 80mg	PDL (Pro Doc Limitee)	0.2529	0	
	02471191	M-Atorvastatin 80mg	MAP (Mantra Pharma IN	0.2529	0	
	02457784	ACH-Atorvastatin Calcium 80mg	ACH (Accord Healthcare	0.2529	0	

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.

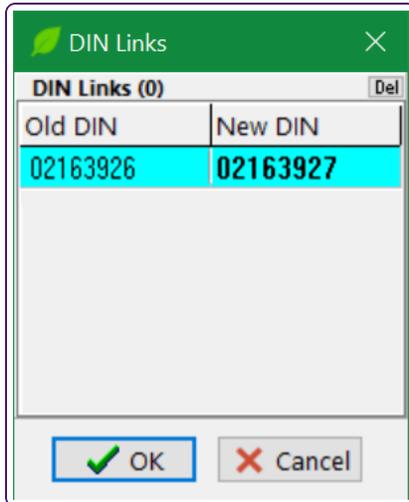
History for Drug
> 2023-07-17 18:47 User:HeadOffice Plans (Insert)
> 2023-07-17 18:47 User:HeadOffice Drug (Update)
> 2023-07-17 18:47 User:HeadOffice UPC (Delete) UPC (Delete)
> 1900-01-01 00:00 User:Kroll Drug (Insert) DrgCatPackLink (Insert) Pack (Insert) UPC (Insert) UPC (Insert) UPC (Insert)

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

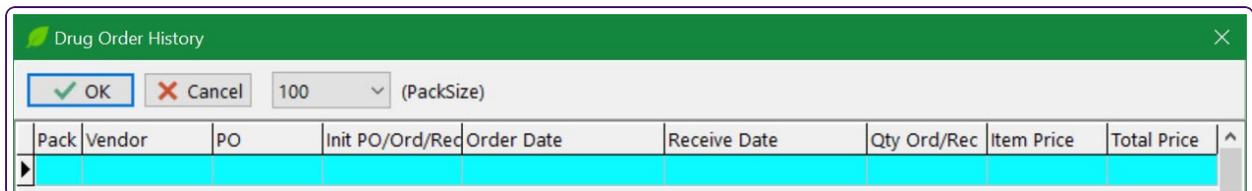
DIN links appear for drug products that have had a DIN change. They link the old DIN to the new DIN so that the system recognizes that both DINs are for the same product. You cannot create a DIN Link, but you can remove one by highlighting it and selecting **Del** or pressing Delete.



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.



#	Quick Code	Description
1	METH	Methadone*

3. Double-click the mixture record.

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

The screenshot shows the 'F5 - Mixture' window. At the top, there are tabs for 'F3 - Patient', 'F5 - Mixture', 'F7 - Doctor', 'F9 - Workflow', 'F10 - Pickup', 'F11 - Drop-off', 'F12 - New Rx', and 'Alt+X - Start'. Below the tabs, the 'QuickCode' is 'METH' and the 'Name' is 'Methadone*'. There are 'Save' and 'Cancel' buttons. The 'General' tab is selected, showing various fields for 'Enter Proportions by:', 'Form', 'Route of Admin', 'Schedule', 'Oral/Written', 'Mix Type', 'Price Group', 'Default Sig', and 'Provincial PIN'. There are also checkboxes for 'Active', 'Reportable', 'Refrigerated', and 'Methadone'. A 'Mixture Time' section is on the right. Below these fields are 'Ctrl ↑ Previous' and 'Ctrl ↓ Next' buttons. The 'Ingredients (2)' table is visible, listing two ingredients: Citric Acid Pwd and Methadone. The 'Supplies (0)' table is empty.

DIN	Brand Name	Generic Name	PackSize	Form	Strength	%	Billing	Active
90800015	Citric Acid Pwd		100 GM (		0.1		True	True
00999734	Methadone	Methadone	100 GM (		99.9		False	True

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.

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

The screenshot shows the F5 - Mixture window. At the top, there are tabs for F3 - Patient, F5 - Mixture, F7 - Doctor, F9 - Workflow, F10 - Pickup, F11 - Drop-off, F12 - Fill Now, and Alt+X - Start. The patient information section includes Patient Search (Blondel, Elina), DOB (17/07/1943), Age (81 years), Address (18-2545 Rue Beaudry), Gender (Female), and RAMQ (BLOE43571716). The 'New Rx' form is active, with 'methadone' entered in the Drug/Mix field. Other fields include Dgctor, Name, Address, Lic#, Strength, Form, OnHand (0), Sig, Disp Qty, Days Supply, Rx Status (Fill), and Rx Comment. A 'Patient Profile' sidebar on the right lists options like Drop-off, Import Script Image File, Patient Documents (1), and Patient Profile (All Rxs, Active Rxs, etc.).

The matching mixtures are displayed.

- Double-click the applicable record.
The **F5 - Mixture** window is displayed.

Performing an advanced mixture search

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

The **Advanced Search** pane is displayed.

The screenshot shows the F5 - Mixture window with the 'Advanced Search' pane open. The 'Search Criteria' section has 'Mixture' checked and a 'Search' button. Below this, there are filters for Drug Group, Price Group, Mixture Time, Form, Mix Type, Schedule, Reportable, Methadone, and Mixture. The 'Advanced Search' section has radio buttons for 'Only Active', 'Only InActive', and 'All', with 'All' selected.

- Enter your search criteria, then select **Search**.
- To locate an inactive 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:

The screenshot shows the 'F5 - Mixture' window with the following details:

- QuickCode: METH
- Name: Methadone*
- Buttons: Changed, Save, Cancel
- Tabs: General, Instructions, Comments, Plan, Other
- Enter Proportions by: Percentage (selected), Units, Bags/Capsules, Methadone Conc.
- Base Quantity: 100
- Form: ML (Agent de rinçage oral)
- Route of Admin: <None>
- Schedule: N (Narcotiques)
- Oral/Written: Written Only
- Mix Type: 3 (Liquide Interne)
- Price Group: <None>
- Default Sig:
- Provincial PIN: <None>
- Expiry (Days):
- Active: (highlighted with a red box)
- Reportable:
- Refrigerated:
- Methadone:
- Mixture Time: None
- If Rx Qty (Minutes): 0, 0, 0, 0, 0

Recommended mixture naming conventions

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

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

The screenshot shows the F5 - Mixture search window. At the top, there are tabs for F3 - Patient, F5 - Mixture, F7 - Doctor, F9 - Workflow, F10 - Pickup, F11 - Drop-off, F12 - New Rx, and Alt+X - Start. Below the tabs, there is a search criteria field containing 'meth' and a 'Mixture' checkbox that is checked. To the right of the search criteria field are buttons for 'Edit' (with a green checkmark), 'Ins Insert' (highlighted with a red box), 'Cancel' (with a red X), and 'Copy Mixture'. Further right, there is an 'Advanced' checkbox that is unchecked. To the right of the search criteria field, there is a 'Searching By' dropdown menu set to 'Description (Advanced)'. Below the search criteria field, there is a '1 Record Found' indicator.

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.

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

F3 - Patient F5 - Mixture F7 - Doctor F9 - Workflow F10 - Pickup F11 - Drop-off F12 - New Rx Alt+X - Start

QuickCode: METH Changed Save Cancel

Name: Methadone*

General | Instructions | Comments | Plan | Other Ctrl

Enter Proportions by: Percentage Units Bags/Capsules Methadone Conc.

Base Quantity: 100

Form: ML (Agent de rinçage oral) Expiry (Days):

Route of Admin: <None> Active

Schedule: N (Narcotiques) Reportable

Oral/Written: Written Only Refrigerated

Mix Type: 3 (Liquide Interne) Methadone

Price Group: <None>

Default Sig:

Provincial PIN: <None> F2

Mixture Time: None F2

If Rx Qty => (Minutes)

<input type="text" value="0"/>	<input type="text"/>

Ctrl Previous Next Ctrl

Ingredients (2) F2 Ins Del ↑ ↓

DIN	Brand Name	Generic Name	PackSize	Form	Strength	%	Billing	Active
90800015	Citric Acid Pwd		100 GM (			0.1	True	True
00999734	Methadone	Methadone	100 GM (			99.9	False	True

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. <ul style="list-style-type: none"> 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	<p>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.</p> <p>If you selected Bag/Capsules as the method of entering proportions, a single Charge (Minutes) field is displayed.</p> <p>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:</p> <ul style="list-style-type: none"> ■ 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. <p>For more information, see "Setting the minimum and maximum mixture fees" (page 150) .</p>

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.

- To insert a new comment, select **Ins** or press Insert.
The **Comments** pop-up is displayed.

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

Comments

Topic: Show On Rx Print On Hardcopy

F2 - Rich Editor Alert Workflow Alerts (0)

Do not consume with grapefruit juice. This can increase blood levels and the effects of methadone.

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.

Plan Name	Mix Type	Default	Covered	Pseudo DIN	Description	Bill As Pack
CAF - Forces Armées Canadiennes (Défense Nat.)		Yes	No		Default	No

- 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	<p>The groups the mixture belongs to.</p> <p>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.</p> <p>Mixture groups are created by head office.</p> <p>To add a group, select Ins, then move groups from Available Groups to Selected Groups.</p>
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.

Mixture Time	
None	F2
If Rx Qty	(Minutes)
=>	
0	8
100	10
250	16
0	
0	

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.

The screenshot shows a window titled "Mixture Time". At the top, there is a dropdown menu set to "None" with a downward arrow and a button labeled "F2". Below this is a table with two columns: "If Rx Qty" and "(Minutes)". The first row has "=>" in the first column and "8" in the second column. The following four rows have "0" in the first column and empty boxes in the second column.

If Rx Qty	(Minutes)
=>	8
0	
0	
0	
0	

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

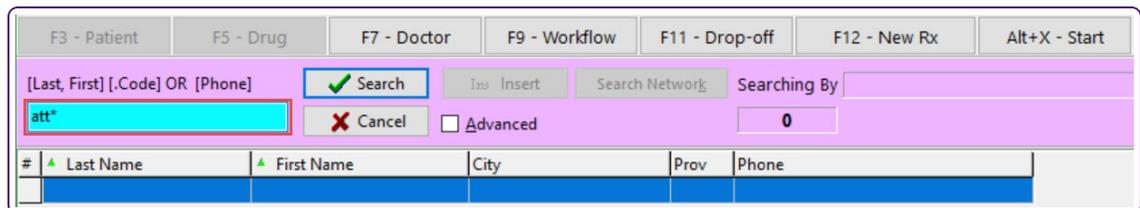
Prescriber records

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.



The screenshot shows the F7 - Doctor window with the following elements:

- Navigation tabs: F3 - Patient, F5 - Drug, **F7 - Doctor**, F9 - Workflow, F11 - Drop-off, F12 - New Rx, Alt+X - Start
- Search input field: [Last, First] [.Code] OR [Phone] containing "att*" (highlighted with a red box)
- Buttons: Search (with a green checkmark), Cancel (with a red X), and Advanced (checkbox)
- Search Network: Search Network (disabled)
- Searching By: Searching By (dropdown menu)
- Count: 0
- Table with columns: #, Last Name, First Name, City, Prov, Phone

3. Double-click the prescriber record.

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

The screenshot shows the 'F7 - Doctor' window with the following details:

- Navigation:** F3 - Patient, F5 - Drug, **F7 - Doctor**, F9 - Workflow, F11 - Drop-off, F12 - New Rx, Alt+X - Start
- Patient Info:** Last Name: Attach, First Name: Radium, Salutation: Dr., QuickCode: [empty]
- Buttons:** OK, Save, Scan
- Addresses:**
 - Primary Location: Doctor Active:
 - Locations (1): Office
 - Address 1, Address 2, City, Postal, Phone: [empty]
 - Prov: BC (British Colum), Country: Canada
- Comments (0):** Table with columns Topic and Comment.
- Groups (0):** Empty table.
- General Licences:**
 - Doctor Information: Designation: Doctor, Specialty: [empty], Prescribing Rights: Full Rights, Written Language: English, Spoken Language: [empty], Email: [empty]
 - Primary Licence Number: Type: BC College of Physicians and Surgeons, Licence: XXBKX, Ref ID: 91
 - Other Licences (0): [empty]
 - Signature: No image available
 - Prescriptions/Refills: No Kroll Care, No Fax Refills, No Phone Refills, No Professional Service Faxes
 - Dates: Created On: 09/07/2024 16:55:15, Changed On: 09/07/2024 16:55:15, Last Rx On: 23/08/2024 14:29:41

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**.

The screenshot shows the 'Alt+X - Start' window with the following details:

- Navigation:** F3 - Patient, F5 - Drug, **F7 - Doctor**, F9 - Workflow, F11 - Drop-off, F12 - New Rx, Alt+X - Start
- Search:** *att
- Last Rx Numbers:** Regular: 1000018, Narcotic: 9000002
- Dashboard:** Dashboard (12), Callbacks (2), Followups (1), Notes (1), Inbound Docs, Outbound Fax

- 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.

The screenshot displays the 'F7 - Doctor' window with the following details:

- Navigation:** F3 - Patient, F5 - Drug, **F7 - Doctor**, F9 - Workflow, F11 - Drop-off, F12 - New Rx, Alt+X - Start
- Personal Info:** Last Name: Attach, First Name: Radium, Salutation: Dr., QuickCode: [empty]
- Buttons:** OK, Save, Scan
- Addresses:** Add, Modify, Delete, Primary Location: , Doctor Active:
 - Locations (1): Office
 - Address 1, Address 2, City, Postal, Phone
 - Prov: BC (British Columb), Country: Canada, Fax
- Phone Numbers (0):** Description, Phone
- Comments (0):** Topic, Comment
- Groups (0):** [empty]
- General / Licences:**
 - Doctor Information: Designation: Doctor, Specialty: [empty], Prescribing Rights: Full Rights, Written Language: English, Spoken Language: [empty], Email: [empty] Send
 - Dates: Created On: 09/07/2024 16:55:15, Changed On: 09/07/2024 16:55:15, Last Rx On: 23/08/2024 14:29:41
 - Primary Licence Number: Type: BC College of Physicians and Surgeons, Licence: XXBKX, Override: , Ref ID: 91
 - Other Licences (0)
 - Signature: No image available
 - Prescriptions/Refills: No Kroll Care, No Fax Refills, No Phone Refills, No Professional Service Faxes
 - Buttons: Load, Delete

Method 3: From the F11 - Drop-Off window

- From the **F11 - Drop-Off** window, search for and select a patient.
The **Doctor** field is enabled.
- In the **Doctor** field, enter any of the search criteria described in the previous section, then press **Enter**.

The screenshot shows the F11 - Drop-Off window. At the top, there are tabs for F3 - Patient, F5 - Drug, F7 - Doctor, F9 - Workflow, F11 - Drop-off, F12 - Fill Now, and Alt+X - Start. The Patient Search section includes fields for Smith, B (DOB), Age, Home (555) 555-5555, Address (3 Main Street), Gender, and Plan. Below this, there are fields for Priority, Default Wait Time (F2), Due (in 19 mins), Delivery (Pickup), and Work Order (32). The New Rx section is highlighted with a red box and contains fields for Doctor (*att), Name, Address, Lic#, Drug/Mix, Name, Strength, Form, OnHand (0), Sig, and Init (AA). There are also fields for Disp Qty, + Refills, = Auth Qty, Days Supply, Unlimited Refills Until, Rx Status (Fill), and Written Date. A bottom section contains buttons for Add and Cancel. On the right side, there is a Patient Profile panel with options like Import Script Image File, Documents (0), View Drop-off Work Orders, All Rxs, Active Rxs, Active Rxs w/Passtimes, Refillable Rxs, Pricing Profile, and Not Disp./OTC Rxs.

- 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

- From the **F7 - Doctor** search window, select **Advanced**.
The **Advanced Search** pane is displayed.

The screenshot shows the F7 - Doctor search window. At the top, there are tabs for F3 - Patient, F5 - Drug, F7 - Doctor, F9 - Workflow, F11 - Drop-off, F12 - New Rx, and Alt+X - Start. The search bar contains [Last, First] [Code] OR [Phone] and *att. There are buttons for Search, Insert, Search Network, and Searching By. Below the search bar, there are buttons for Cancel and Advanced. The Advanced Search pane is highlighted with a red box and contains fields for Address, City, Group, Designation, and Specialty. There is also a Show section with radio buttons for Active, Inactive, and All (selected).

- 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.

The screenshot shows the 'F7 - Doctor' window. At the top, there are tabs for 'F3 - Patient', 'F5 - Drug', 'F7 - Doctor', 'F9 - Workflow', 'F11 - Drop-off', 'F12 - New Rx', and 'Alt+X - Start'. Below the tabs, there are input fields for 'Last Name' (with a red box around 'Attach'), 'First Name' (Radium), 'Salutation' (Dr.), and 'QuickCode'. There are buttons for 'OK', 'Save', and 'Scan'. Below this is the 'Addresses' section with 'Add', 'Modify', and 'Delete' buttons. A 'Locations (1)' list shows 'Office'. To the right, there is a 'Doctor Active' checkbox which is checked and highlighted with a red box. Further right is a 'Phone Numbers (0)' table with columns for 'Description' and 'Phone'. At the bottom, there are 'City', 'Postal', 'Phone', 'Prov' (BC (British Colum)), 'Country' (Canada), and 'Fax' fields.



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.

The screenshot shows the 'Advanced Search' window. At the top, there are tabs for 'F3 - Patient', 'F5 - Drug', 'F7 - Doctor', 'F9 - Workflow', 'F11 - Drop-off', 'F12 - New Rx', and 'Alt+X - Start'. Below the tabs, there is a search input field with a red box around it. There are buttons for 'Search', 'Cancel', and 'Advanced' (checked with a red box). To the right, there is a 'Searching By' dropdown and a '0' button. Below this is the 'Advanced Search' section with fields for 'Address', 'City', 'Group', 'Designation', and 'Specialty'. To the right of these fields is a 'Show' section with radio buttons for 'Active', 'Inactive', and 'All' (selected with a red box). At the bottom, there is a table with columns for '#', 'Last Name', 'First Name', 'City', 'Prov', and 'Phone'. The table is currently empty.



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: <ul style="list-style-type: none"> ■ 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.

Licence Type	Licence #	Ref ID	Licensing Body
NL Dental Hygienist	2451	00	Newfoundland and Labrador College of Dental Hygienists
NB Dental Hygienist	1245	00	New Brunswick College of Dental Hygienists
BC Dental Hygienist	1452	00	College of Dental Hygienists of British Columbia

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

Add/Modify Licence

Designation: Dental Hygienist Filtered

Type: BC Dental Hygienist

Licence: Override Ref ID: 00

Save

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

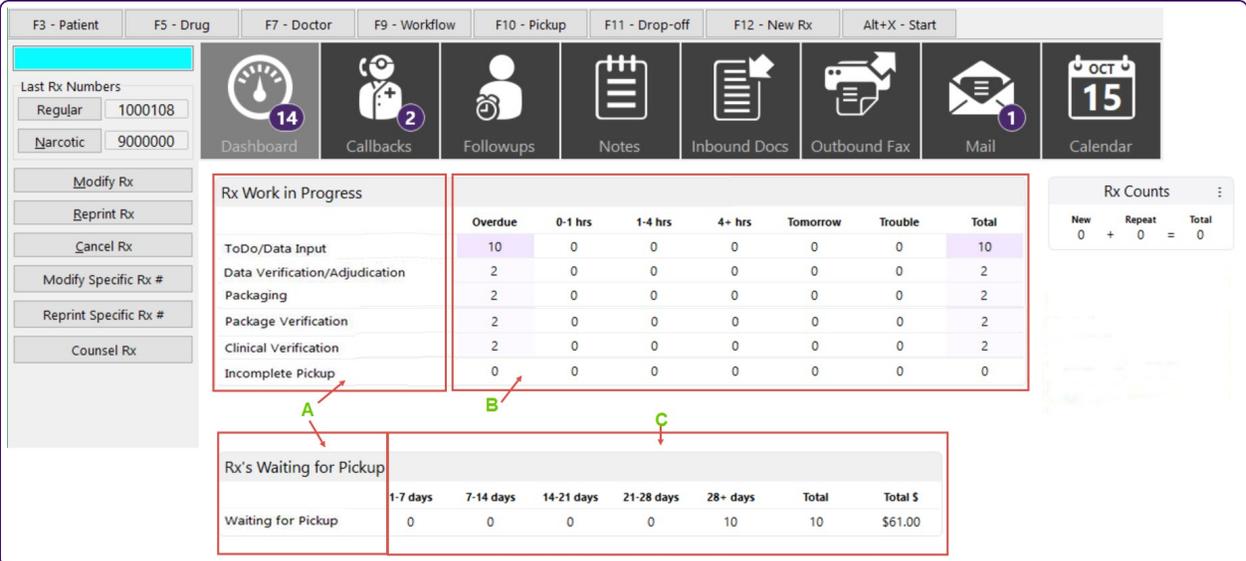
Workflow management

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



The screenshot displays the Kroll software interface with various workflow management tools and data tables. The top navigation bar includes tabs for F3 - Patient, F5 - Drug, F7 - Doctor, F9 - Workflow, F10 - Pickup, F11 - Drop-off, F12 - New Rx, and Alt+X - Start. The main dashboard features icons for Dashboard (14), Callbacks (2), Followups, Notes, Inbound Docs, Outbound Fax, Mail (1), and Calendar (OCT 15).

On the left, there are buttons for 'Last Rx Numbers' (Regular: 1000108, Narcotic: 9000000), 'Modify Rx', 'Reprint Rx', 'Cancel Rx', 'Modify Specific Rx #', 'Reprint Specific Rx #', and 'Counsel Rx'.

The central 'Rx Work in Progress' table shows the following data:

	Overdue	0-1 hrs	1-4 hrs	4+ hrs	Tomorrow	Trouble	Total
ToDo/Data Input	10	0	0	0	0	0	10
Data Verification/Adjudication	2	0	0	0	0	0	2
Packaging	2	0	0	0	0	0	2
Package Verification	2	0	0	0	0	0	2
Clinical Verification	2	0	0	0	0	0	2
Incomplete Pickup	0	0	0	0	0	0	0

Annotations A, B, and C point to the 'Incomplete Pickup' row, the 'Overdue' column, and the 'Total' column respectively.

The 'Rx's Waiting for Pickup' table shows the following data:

	1-7 days	7-14 days	14-21 days	21-28 days	28+ days	Total	Total \$
Waiting for Pickup	0	0	0	0	10	10	\$61.00

On the right, the 'Rx Counts' summary shows: New 0, Repeat 0, Total 0.

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 cost (actual acquisition cost), respectively.

Drop-off

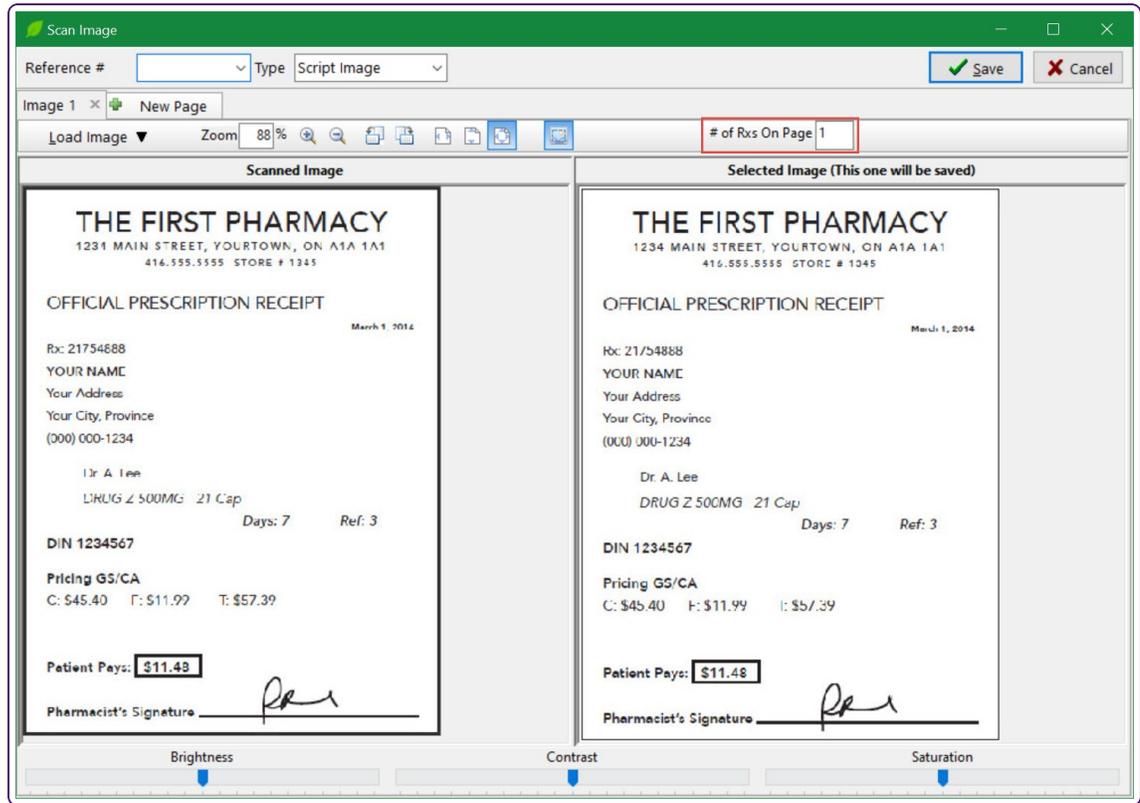
You can use the **F11 - Drop-off** window to enter Rx information while the patient is still in the pharmacy.

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 Rx's On Page** field.



4. Select **Save**.

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

The screenshot shows the 'Drop-off' window with the following details:

- Navigation:** F3 - Patient, F5 - Drug, F7 - Doctor, F9 - Workflow, F11 - Drop-off, F12 - Fill Now, Alt+X - Start
- Patient Search:** Smith, Zoe; DOB: 07/07/1970; Age: 54 years; Home: (555) 555-5555; Address: 3 Main Street; Gender: Female; PI: 9735253058
- Priority:** Default Wait Time; Due: in 19 mins; Delivery: Pickup; Work Order: 34
- Pharmacy Info:** THE FIRST PHARMACY, 1234 MAIN STREET, YOURTOWN, ON A1A 1A1, 416.555.5555 STORE # 1345
- Official Prescription Receipt:** Rx: 21754888, YOUR NAME, Your Address, Your City, Province, March 1, 2014
- New Rx Form:** Doctor Name, Address, Lic#, Drug/Mix Name, Strength, Form, OnHand (0), Sig, Disp Qty, Refills, Auth Qty, Days Supply, Unlimited Refills Until, Rx Status (Fill), Written Date, Rx Comment
- Buttons:** Import New Image, Select a Different Image, Don't Use This Image, Add, Cancel
- Workorder items:** Clear All, Finalize Work Order

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.

The close-up shows the 'Rx Status' field set to 'Fill' and the 'Add' button highlighted. The 'Workorder items' list contains one entry: '1 New Rx Smith, Zoe'.

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.

F3 - Patient	F5 - Drug	F7 - Doctor	F9 - Workflow	F11 - Drop-off	F12 - Save Changes	Alt+X - Start
9000001 Modify Rx Pending Adj (Inact)		Previous Fill	This Rx	Rx Start Date	Latest Fill	<input type="button" value="Lookup"/> <input type="button" value="Cancel"/>
Priority	Default Wait Time	F2	Due	1m 10d ago	Fill Rx	F2
Patient Search		Drug Search	Pack	100	Dgc Search	Loc
Name	Smith, Zoe	Age:	54	Brand	AC&C Tablets	375/15/8mg
Address	3 Main Street	Female		Generic	Acetylsalicylic Acid/Caffeine/Codeine Ph	PPI (Penc)
City	Vancouver	Prov	BC	Pack	100 Form	TAB Sched N
Phone	Home (555) 555-5555			Purch	\$3.50	OnHand -60
Plan	PI	Client ID	9735253058	DIN	02303299	Min Qty 0
Allergies (0)		Sig		AA	No image	
Conditions (0)		THE AFFECTED AREA(S)				
		Route of Admin	Oral	Init	AA	AA
		Dosage Form	Tablet	Auth Qty	60	1
				Disp Qty	60	TAB
				Days	30	G.P. %
				Prod Sel	3 - Pharmacia	Acq Cost
				O/W		Cost
				Labels	1	Markup
						Fee
						Total
						\$12.10
Plans Pricing Dates Comments Indications Images Other		Unit Dose (Ctrl-U): Disabled				
Rx Plans		<ul style="list-style-type: none"> Drug will be Ordered Delivery Label will be printed 				
Plan Pays	Extra Info (F2 Edits)					
PI	Not Adjud.					
Cash	Not Adjud. Deduct: \$0.00					
Next Disp Qty	Min Interval Days	Enable Auto-Refill				
Comments	Max Disp Qty					

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: <ul style="list-style-type: none"> 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, Dosesets, 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 screenshot shows the 'Rx Information' window with the following details:

- Administration Period:** Start: 20/06/2024, Stop: (empty)
- Drug:** COM Apo Quetiapine 100mg
- Sig:** TAKE 1 TABLET ONCE DAILY
- Dosing:** Unit Dose (checkbox), Frequency: Daily (dropdown), Card Number: 1
- Calendar:** A grid with columns 1-28 and rows Breakfast, Lunch, Dinner, Bedtime.

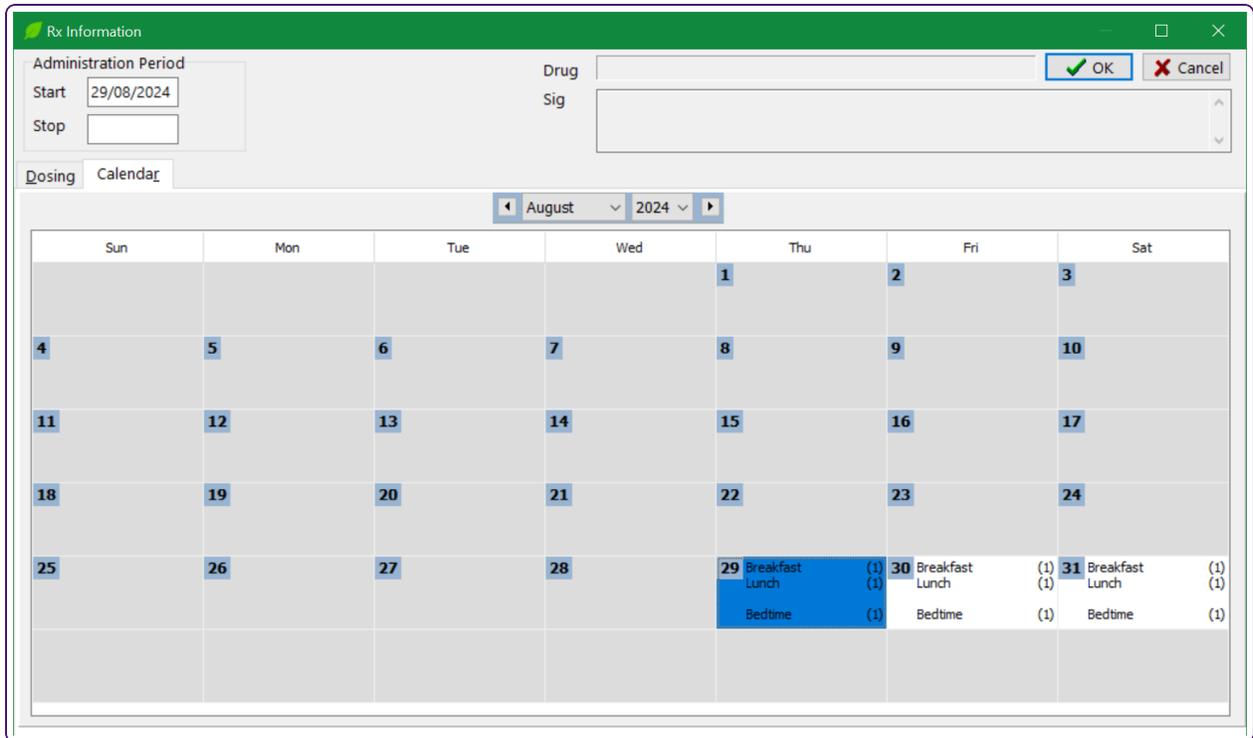
The following table describes the fields in the top panel of this window.

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.

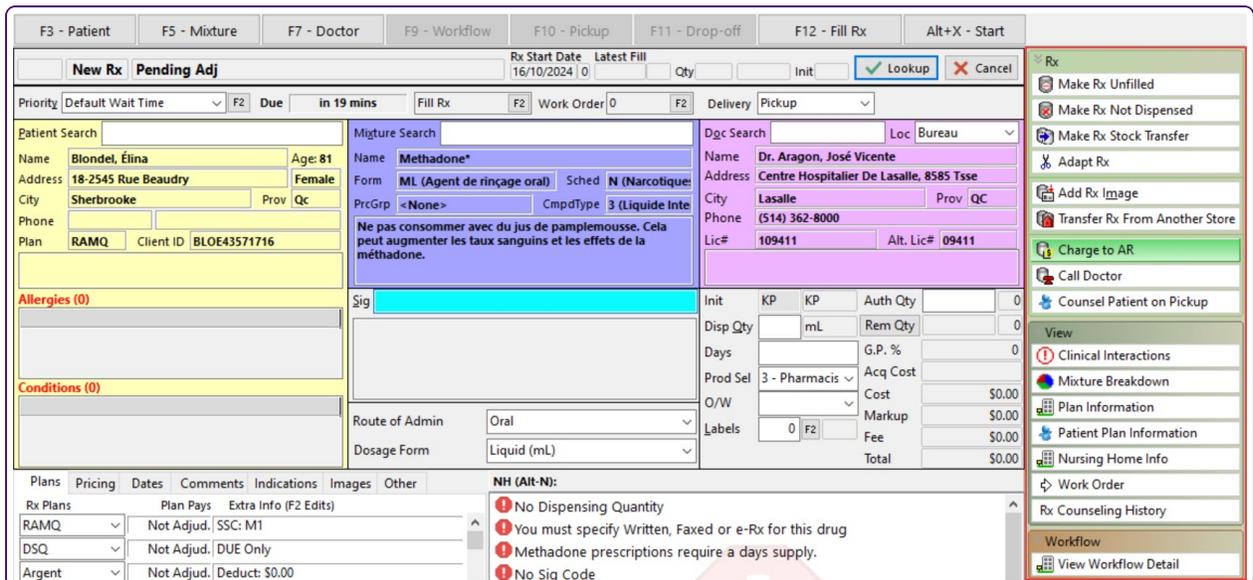
Name	Description
Unit Dose	If selected, unit dosing is enabled for the Rx, and the other fields on this tab are enabled.
Frequency	The dosing frequency.
Card Number	The card number used to group Rxs by unit dose packaging type. The default value is 1.
Quantity	Each box on the grid represents a quantity (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 Rx's 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	If 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	<p>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.</p> <p>The following bullets describe some of the fields on this window:</p> <ul style="list-style-type: none"> ■ 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	<p>Select to view the Unit Dose Rx Information window for the Rx.</p> <p>For more information, see "Unit Dose" (page 170).</p>
Work Order	<p>Select to display the work order number.</p> <p>Rxs filled with the same work order number are intended to be picked up together using the pickup application.</p>
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.

F3 - Patient		F5 - Drug		F7 - Doctor		F9 - Workflow	
<input type="button" value="New Rx"/> <input type="button" value="Pending Adj"/>							
Priority	Default Wait Time	F2	Due	in 19 mins	Fill Rx		
Patient Search <input type="text"/>				Drug Search <input type="text"/>			
Name	Blondel, Élina		Age:	81		Brand	<input type="text"/>
Address	18-2545 Rue Beaudry		Female			Generic	<input type="text"/>
City	Sherbrooke	Prov	Qc			Pack	<input type="text"/> Form <input type="text"/>
Phone	<input type="text"/>				Purch	<input type="text"/>	
Plan	RAMQ	Client ID	BLOE43571716		DIN	<input type="text"/>	
Allergies (0)				Sig <input type="text"/>			
Conditions (0)				Route of Admin <input type="text"/>			
Dosage Form <input type="text"/>							
<input type="button" value="Plans"/> <input type="button" value="Pricing"/> <input type="button" value="Dates"/> <input type="button" value="Comments"/> <input type="button" value="Indications"/> <input type="button" value="Images"/> <input type="button" value="Other"/>							
Rx Plans		Plan Pays		Extra Info (F2 Edits)			
RAMQ	▼	Not Adjud.	SSC: 0				
DSQ	▼	Not Adjud.	DUE Only				
Argent	▼	Not Adjud.	Deduct: \$0.00				
Next Disp Qty	<input type="text"/>	Min Interval Days	<input type="text"/>	<input type="button" value="Enable Auto-Refill"/>			
Rx Comments (0)		Max Disp Qty	<input type="text"/>				

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**.

Plans	Pricing	Dates	Comments	Indications	Images	Other
Strategy	Price Not Calculated	Acq Cost				
Unit Dose Strategy		G.P. %				0
		Unit drug cost				
<input type="checkbox"/> Manual Price						
	Cost	Markup	Fee	Mix Fee	SSC	Total
						\$0.00
Discounts						\$0.00
Net Amounts	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

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/Pricing .
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: $(\text{Rx Total $$$} - \text{ACC}) / \text{RX total $$$}$
Unit drug cost	The read-only cost per pill. This is based on the following calculation: $\text{Drug pack size} / \text{Purchase Cost of the drug card}$.
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

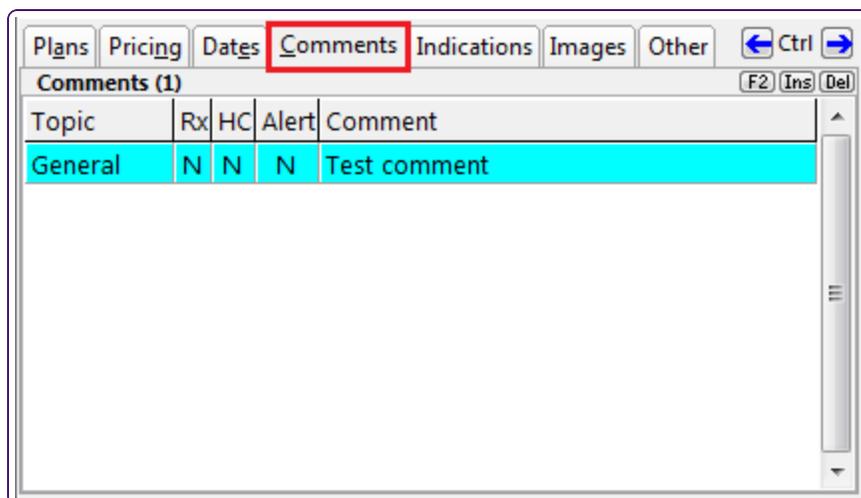
The following table describes the fields on the Dates tab.

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.

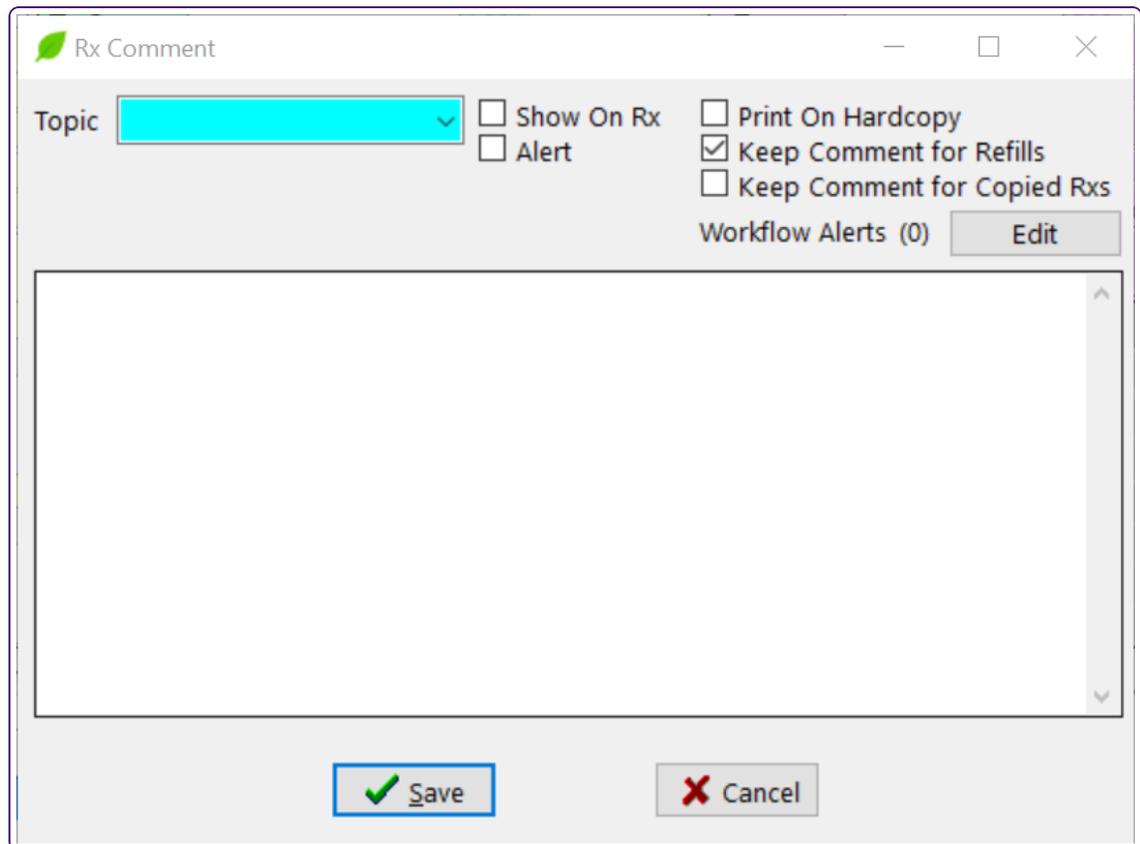
Comments

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**, then select the applicable workflow.

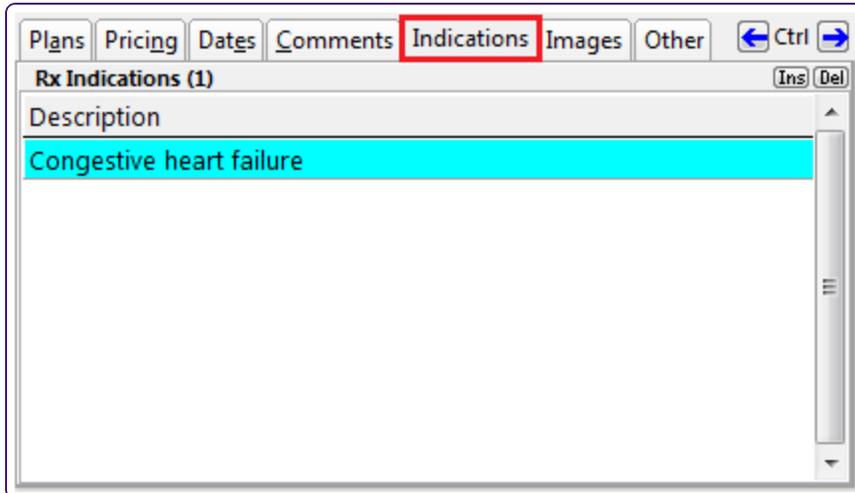


If you select more than one workflow, it will only be displayed on the first workflow unless you escape out of the Rx and return to it for the next workflow.

10. Select **Save**.

Indications

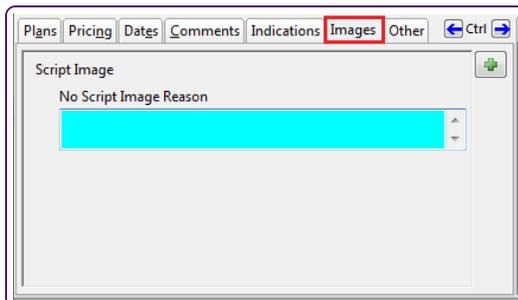
The **Indications** tab allows you to identify what condition(s) the prescription is treating.



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

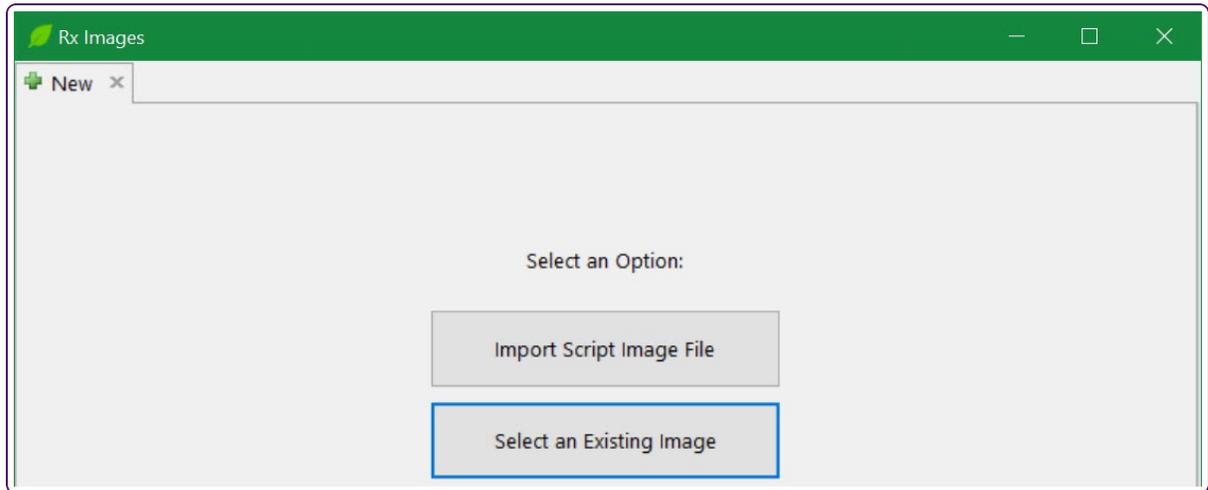
You can use the **Images** tab to import a script image or indicate a reason for not including a script image.



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 screenshot shows a software interface with several tabs: 'Plans', 'Pricing', 'Dates', 'Comments', 'Indications', 'Images', and 'Other'. The 'Other' tab is active. It contains the following fields and controls:

- Admin Sites:** A text input field with a cyan highlight and a dropdown arrow on the right.
- Max Dosage:** A text input field with a dropdown arrow on the right.
- Doctor Authorization Received**
- Include in Narcotic report**
- No Doc ERenewal**
- Transaction Comment:** A large text area with a vertical scrollbar on the right.

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.



-  **No Sig Code**
-  **Rx will expire on 2025-Oct-17 (365 days from written date)**
-  **Delivery Label will be printed**
-  **Rx will be charged to AR.**
-  **Drg Pack Tier Id: 1**
-  **Central Fill calculated eligibility: 4 with backing field 0**
-  **IsCF: 0 WantCF: 1 and PersistentFlags.WantCF: 0**

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

- 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.

The screenshot shows a software interface for patient search. At the top, there are buttons for 'Priority', 'Default Wait Time', 'F2', 'Due', and 'in 19'. The 'Patient Search' field is highlighted in cyan and contains the text 'chris,l'. Below this are several input fields: 'Name', 'Address', 'City', 'Phone', 'Plan', 'Age', and 'Client ID'. The 'Name' field is split into two parts. The 'Phone' field is split into two parts. The 'Client ID' field is split into two parts. The entire form area has a yellow background.

If more than one patient matches the search criteria, a list of matching patients is displayed; otherwise, the matching patient record is displayed.

- 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**.

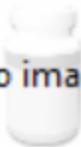
The patient's information is displayed in the patient fields.

Priority	Default Wait Time	▼	F2	Due	in 19
<u>Patient Search</u>	<input type="text"/>				
Name	Christophe, Lylou			Age:	71
Address	155 Boulevard Dagenais Est			Female	
City	Laval		Prov	Qc	
Phone	<input type="text"/>				
Plan	RAMQ	Client ID	CHRL53551718		
<input type="text"/>					

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)

The screenshot shows a search interface with the following fields and values:

Drug Search	cip*		Pack	
Brand				
Generic				
Pack	Form		Sched	
PPB		OnHand	0	No image 
DIN		Min Qty	0	

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.

Drug Search	<input type="text"/>	Pack	100	▼
Brand	Act Ciprofloxin		250mg	
Generic	Ciprofloxacin		CBT (Cob	
Pack	100	Form	COM	Sched 1
PPB	\$44.54	OnHand	0	
DIN	02247339	Min Qty	0	
<input type="text"/>				

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 screenshot shows a search interface with the following elements:

- Doc Search:** A text input field containing "att*", highlighted in cyan.
- Loc:** A dropdown menu with a downward arrow.
- Name:** A single-line text input field.
- Address:** A single-line text input field.
- City:** A text input field followed by a **Prov** dropdown menu.
- Phone:** A single-line text input field.
- Lic#:** A text input field followed by an **Alt. Lic#** dropdown menu.
- Results:** A large empty rectangular box at the bottom, intended for displaying search results.

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.

Dgc Search	<input type="text"/>	Loc	Bureau	▼
Name	Ph. Atta, Fay			
Address	117, Boul. Pierrefonds			
City	Pierrefonds	Prov	QC	
Phone	<input type="text"/>			
Lic#	224208	Alt. Lic#	24208	
<input type="text"/>				

Sig Details

Sig	UD	
AS DIRECTED		
Route of Admin	Nasal	▼
Dosage Form	Spray, Non-Aerosol (mL)	▼

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

Init	KP	KP	Auth Qty		0
Disp Qty		mL	Rem Qty		0
Days			G.P. %		0
Prod Sel	3 - Pharmacia		Acq Cost		
O/W			Cost	\$0.00	
Labels	1	F2	Markup	\$0.00	
			Fee	\$0.00	
			Total	\$0.00	

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.

✱ Label Splits — □ ×

Labels Split quantity on labels

Quantity Split quantity evenly

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.

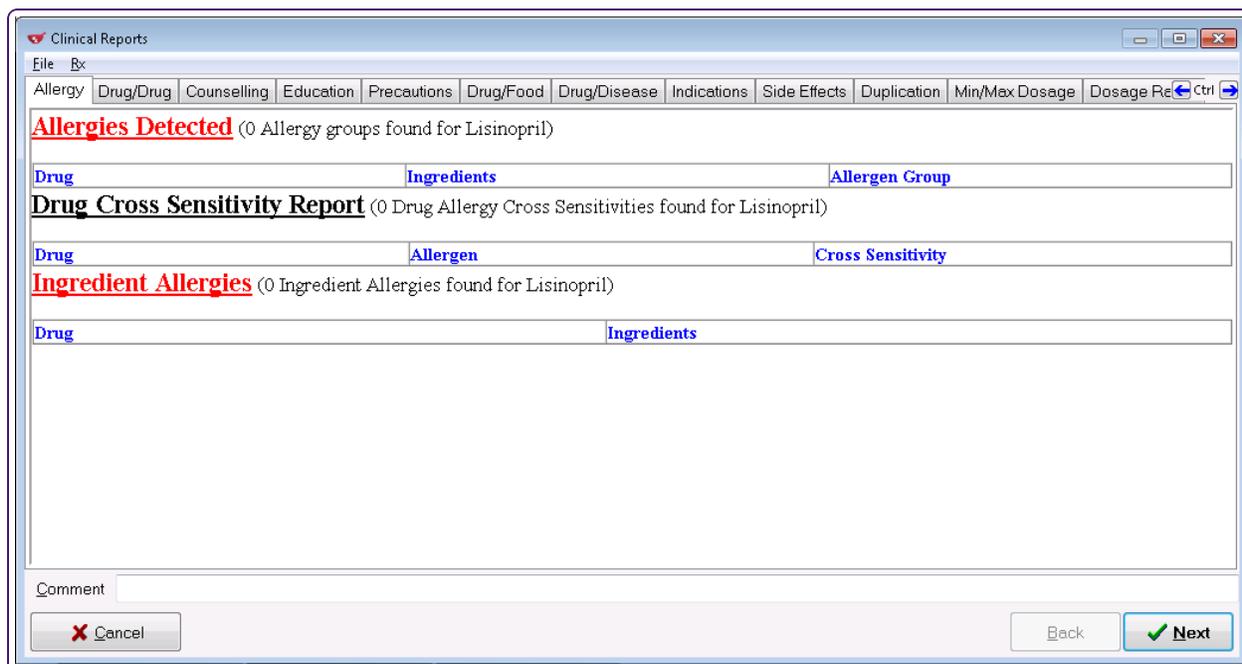
For information on medication reviews, see the *Electronic Medication Reviews Quick Tips* and *Paper Medication Reviews Quick Tips* documents.

Perform Local DUE

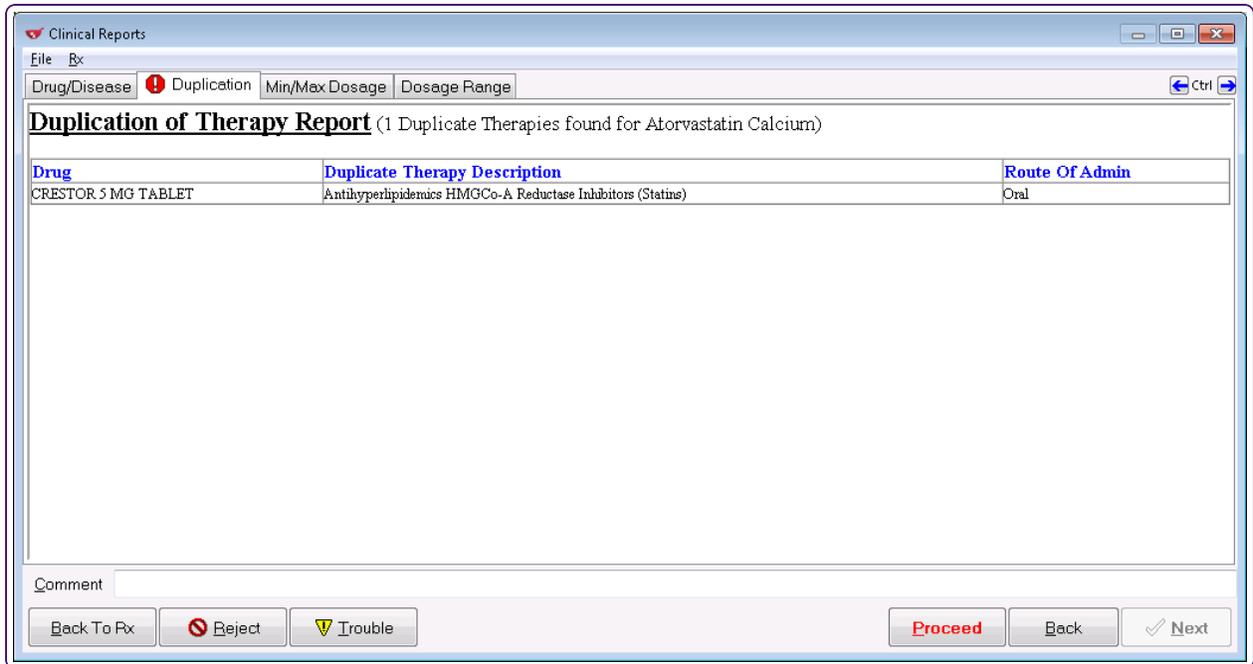
When you are filling an Rx, you can review the First Data Bank (FDB) clinical interactions analysis for a patient's profile. This occurs within the Perform Local DUE workflow action. The analysis is based on information in the patient profile and the selected drug.

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.

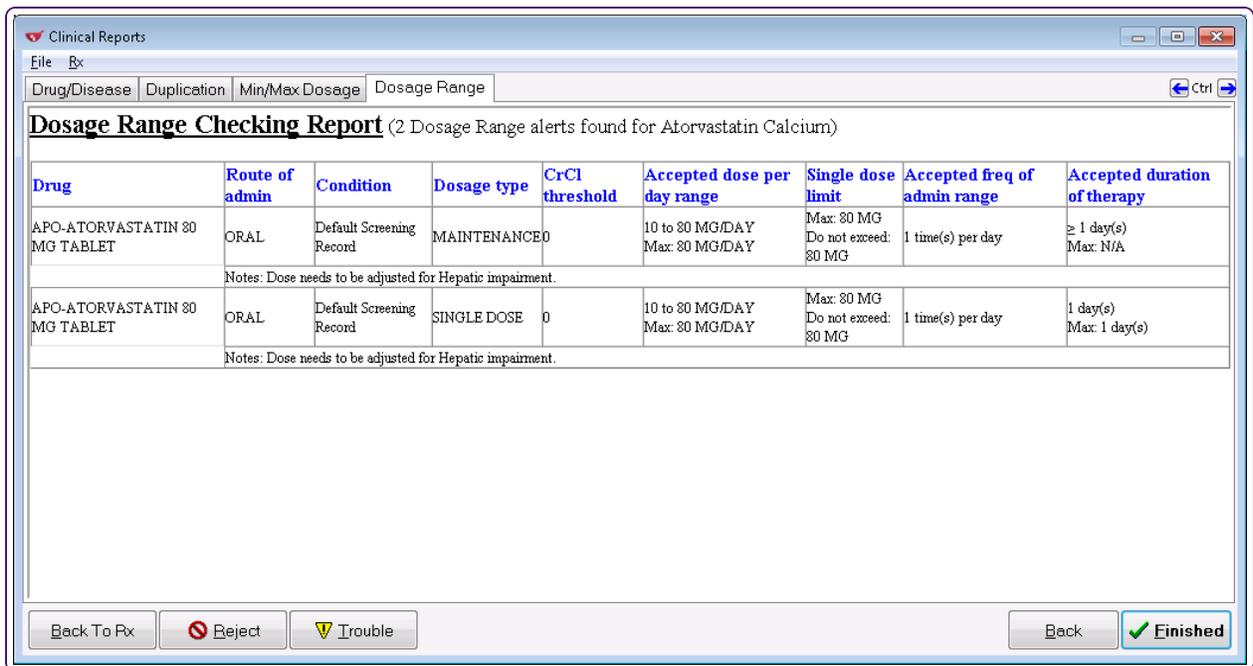
There is also an option to print the clinical report by selecting **File > Print**, as well as an option to counsel the patient at pickup from the **Rx** menu.



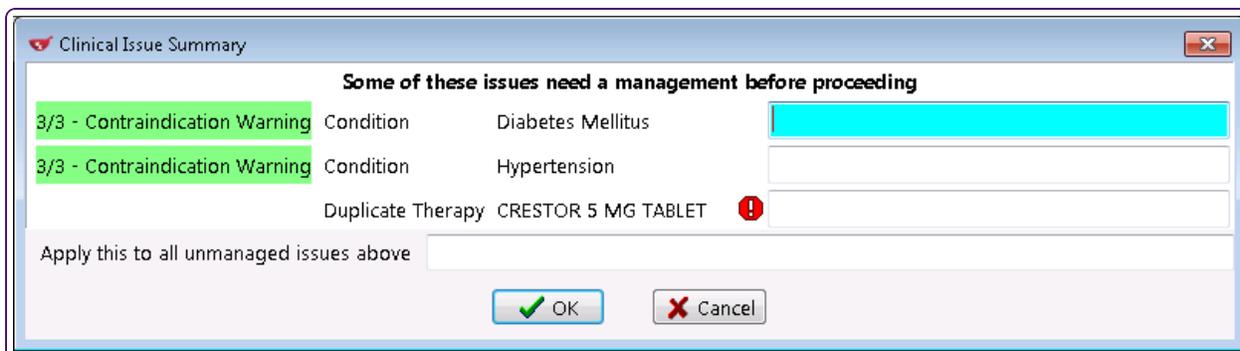
A **Proceed** button is displayed if an interaction needs to be viewed. You cannot bypass a required tab.



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.



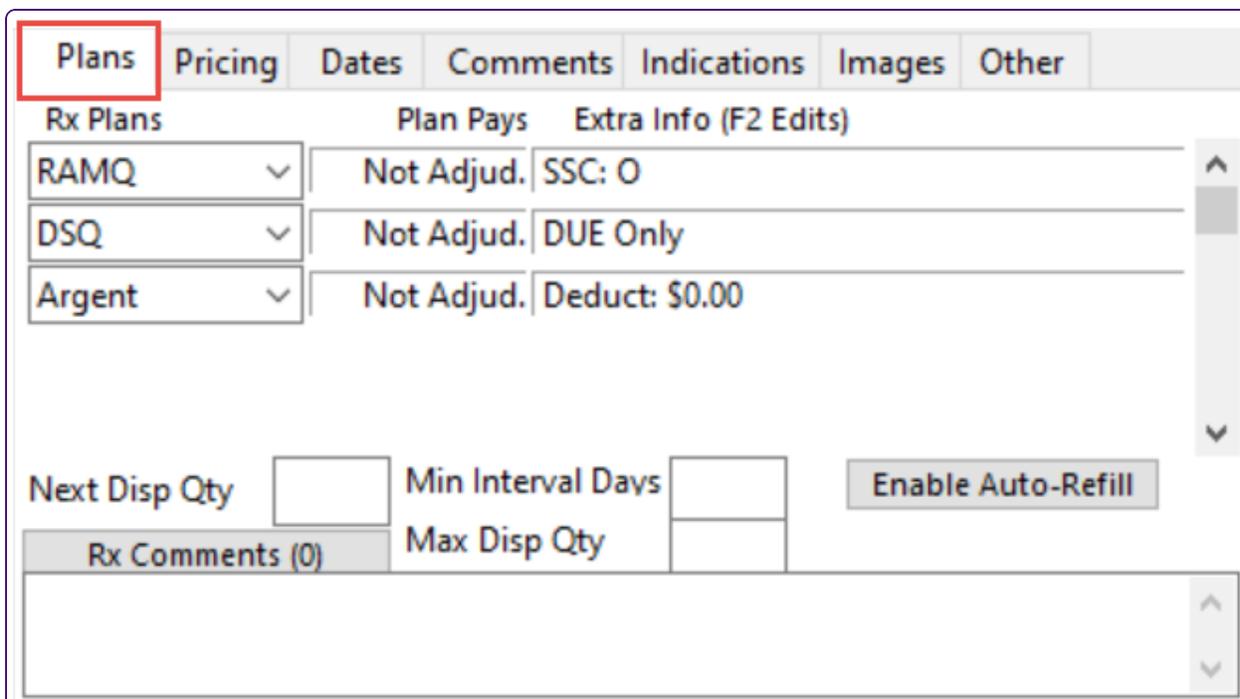
Allocating inventory

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.

✔ Adjudication Response for CS - □ ×

View Rx

The CS claim was accepted

Pricing Adjustments								
	Cost	Markup	Fee	Mix Fee	SSC Fee	Total		
Submitted	3.66	0.37	10.49	0.00	0.00	14.52	Total	14.52
Accepted	3.66	0.37	10.49	0.00	0.00	14.52	Prev Paid	0.00
Difference							Plan Pays	10.89
Discount							Discount	0.00
							Pat Pays	3.63

There was a copay amount of 3.63

Adjust it, if desired, and press Enter.

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 Rx's 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

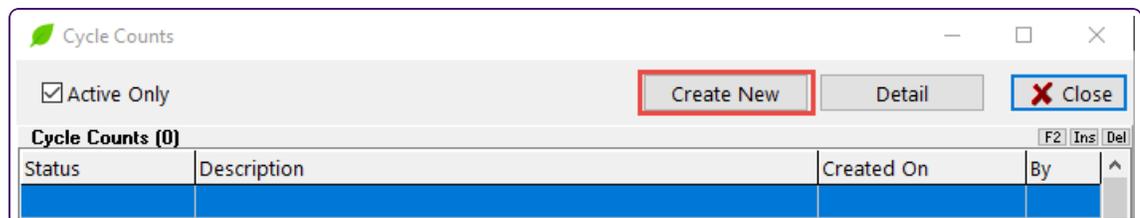
You can use the cycle count feature to manage the quantities of drugs on-hand. This feature enables you to maintain an accurate inventory and efficiently track incoming and outgoing products. You can count 'sections' of inventory, such as specific schedules, manufacturers, drug types and therapeutic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

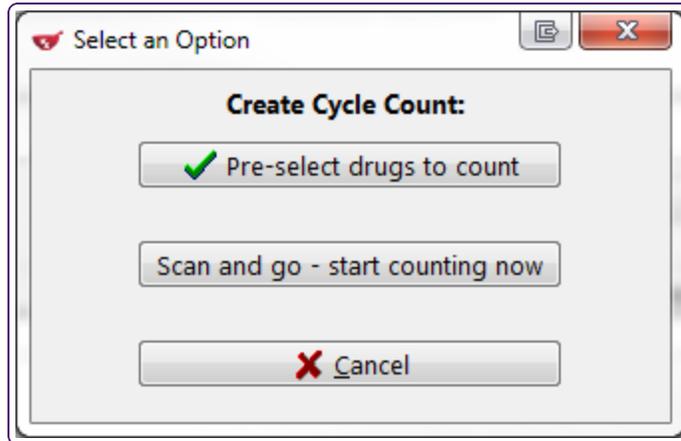


Only pharmacists and pharmacy managers have permission to adjust inventory counts.

1. From the **Alt-X Start** window, select **Utilities > Drug > Drug Inventory Counts**.
The **Cycle Counts** window is displayed.
2. Select **Create New**.

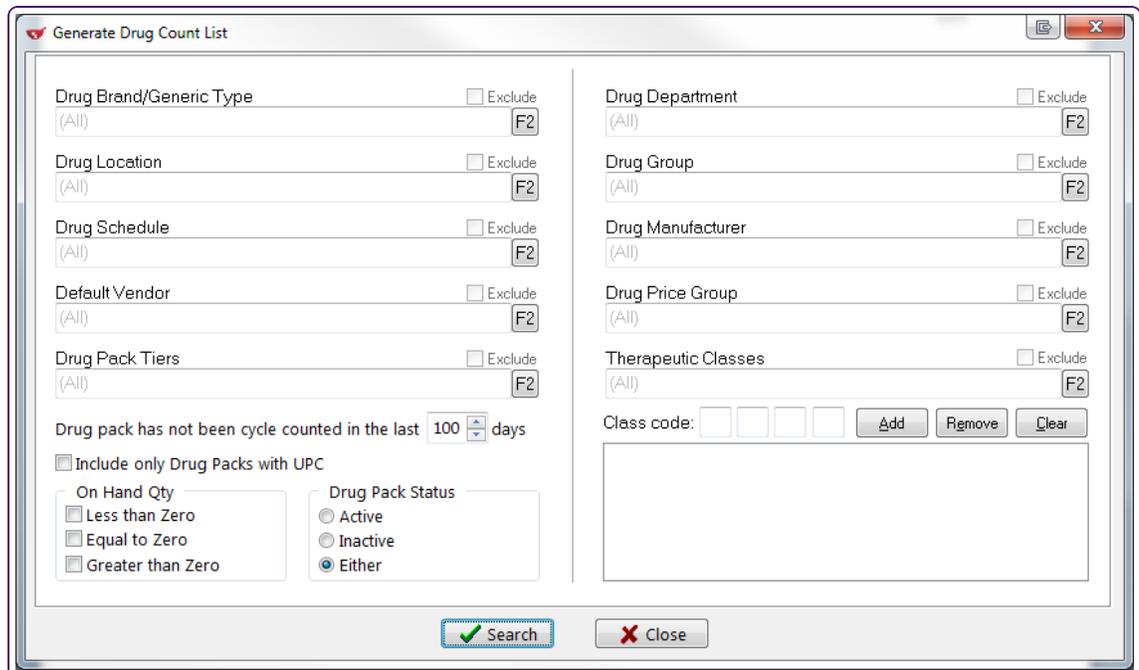


3. Select an option from the **Create Cycle Count** prompt.



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.

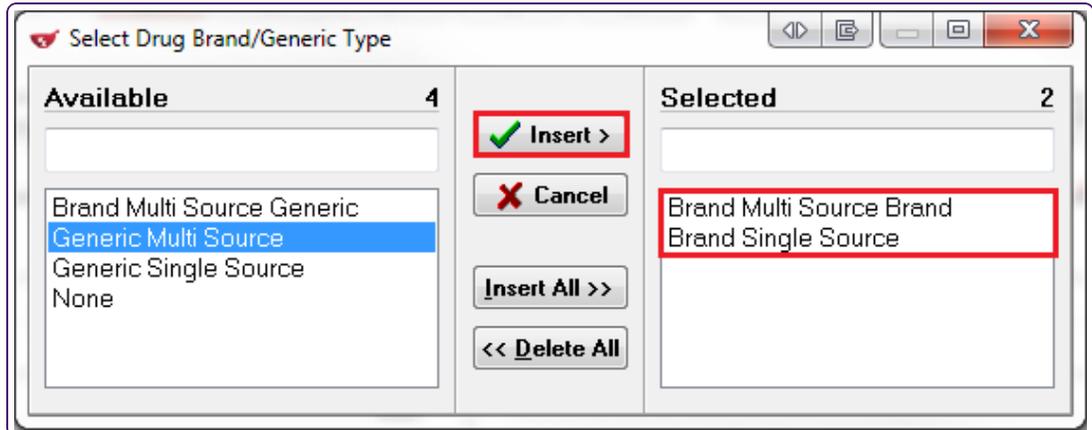


2. To select criteria for the pre-selected drugs:

- 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 screenshot shows the 'Generate Drug Count List' window with the following settings and highlights:

- Drug Brand/Generic Type:** Brand Multi Source Brand. Exclude. F2
- Drug Location:** None. Exclude. F2
- Drug Schedule:** 1 (Schedule 1 [F]); 2 (Schedule 2 [E,D,B]); 3 (Schedule 3 [C]). Exclude. F2
- Default Vendor:** K&F; McKesson; Procurity. Exclude. F2
- Drug Pack Tiers:** Regular. Exclude. F2
- Drug Department:** OTC. Exclude. F2
- Drug Group:** TEVA. Exclude. F2
- Drug Manufacturer:** AAP (AA Pharma Inc.); AAP(AA Pharma Inc.); ABB (Abbott L. Exclude. F2
- Drug Price Group:** Bayer Meter Program; Diabetic; GS Smoking Cessation Pro. Exclude. F2
- Therapeutic Classes:** ADRENALS; AMINOPENICILLINS; MINERALOCORTICOID. Exclude. F2
- Drug pack has not been cycle counted in the last:** 100 days
- Include only Drug Packs with UPC:**
- On Hand Qty:** Less than Zero; Equal to Zero; Greater than Zero
- Drug Pack Status:** Active; Inactive; Either
- Class code:** [][][][] Add Remove Clear
- Buttons:** Search (checked), Close (X)

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**.

Generate Drug Count List

Description: Auto-Created Count 28/08/2014 10:09 Limit results to: 100

Drug Packs (4)

Brand Name	Generic Name	Strength	Form	DIN	UPC	Pack Size
3TC	Lamivudine	150mg	TAB	02192683	062021200029	60
Allerdryl	Diphenhydramine HCl	25mg	CAP	00370517	060752030113	100
Apo-Lorazepam	Lorazepam	1mg	TAB	00655759	771313005500	100
Plavix	Clopidogrel Bisulfate	75mg	TAB	02238682	623131002301	500

Buttons: Back, **Start Counting**, Cancel

The selected drugs are placed used in the count.

6. Select **Count Drugs**.

Cycle Count

Description: Auto-Created Count 28/08/2014 10:09 Count Drugs, Print Report, Close

Status: Not Counted Changed On: 28/08/2014 10:13:42 Reconcile

Drug Packs (4)

Count	Drug	Pack	UPC	DIN	Status	Created	Seq #	Qty Diff	Cost Diff
0	3TC 150mg	60	062021200029	02192683	Not Counted	28/08/2014 10:13:42	1		
0	Allerdryl 25mg	100	060752030113	00370517	Not Counted	28/08/2014 10:13:42	1		
0	Apo-Lorazepam 1mg	100	771313005500	00655759	Not Counted	28/08/2014 10:13:42	1		
0	Plavix 75mg	500	623131002301	02238682	Not Counted	28/08/2014 10:13:42	1		

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

- 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).

- Select **Add Qty**.

The screenshot shows the 'Cycle Count Pack' window. At the top, the 'Drug' field is set to '3TC 150mg (TAB (Film-coated Tablet))' with a function key 'F5'. The 'Quantity Counted' field contains the value '150', which is highlighted in red. To its right are two buttons: a green checkmark button labeled 'Add Qty' and a red 'X' button labeled 'Clear Qty'. On the far right, the 'Total Quantity Counted' field shows '0'. Below this is a table with columns for date, location, and quantity. The main area is divided into two sections: 'Drug' and 'Pack'. The 'Drug' section includes fields for Name (3TC), Generic (Lamivudine), Description (Gry Diamond Tab"GX EJ7"), Location, DIN (02192683), Strength (150mg), Form (TAB (Film-coated Tablet)), and Manufacturer (VIH (VIIV Healthcare Shire C)). The 'Pack' section includes fields for Pack Size (60), Def Vendor/Item (McKesson #771469), Cycle Count Date, and UPC (062021200029).

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

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

The screenshot shows the 'Cycle Count Pack' window after several counts. The 'Drug' field remains '3TC 150mg (TAB (Film-coated Tablet))' with 'F5'. The 'Quantity Counted' field is empty. The 'Add Qty' button is now a green checkmark labeled 'New Drug', and the 'Clear Qty' button is a red 'X' labeled 'Finish'. The 'Total Quantity Counted' field now shows '325'. Below it, a table lists the counts:

Date	Location	Quantity
28/08/2014 10:19:37	KRL	150
28/08/2014 10:19:41	KRL	100
28/08/2014 10:19:44	KRL	75

The drug and pack details from the previous screenshot are also visible in the lower sections of the window.

- 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**.

The screenshot shows the 'Cycle Count' window with the following data:

Count	Drug	Pack	UPC	DIN	Status	Created	Seq #	Qty Diff	Cost Diff
325	3TC 150mg	60	062021200029	02192683	Reconciled	28/08/2014 10:53:46	2	-88,563	62,549.79
145	Allerdryl 25mg	100	060752030113	00370517	Recount Required	28/08/2014 10:53:33	2		
100	Apo-Lorazepam 1mg	100	771313005500	00655759	Reconciled	28/08/2014 10:13:42	1		\$0.00
500	Plavix 75mg	500	623131002301	02238682	Reconciled	28/08/2014 10:13:42	1		\$0.00

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**.

The screenshot shows the 'Cycle Counts' window with the following data:

Status	Description	Created On	By
Counted	Cycle Count 1	27/08/2014 16:05:57	KRL
Counted	Auto-Created Count 28/08/2014 10:09	28/08/2014 10:13:42	KRL

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 screenshot shows the 'Cycle Count' window with the following data:

Count	Drug	Pack	UPC	DIN	Status	Created	Seq #	Qty Diff	Cost Diff
200	Aleve 220mg	500	056500359896	02301733	Counted	28/08/2014 11:01:24	2		
150	A-Mulsion C			80006771	Counted	28/08/2014 11:01:29	2		
200	Abbott-Cital			02414589	Counted	27/08/2014 16:20:41	1		
200	Aleve 220mg		005650035988	02301733	Counted	27/08/2014 16:21:25	1		

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.

- 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.

The screenshot shows a software window titled "Cycle Count Pack". At the top, there is a "Drug" field containing "Aleve 220mg (CPL (Caplet))" and an "F5" button. To the right is a "Total Quantity Counted" field. Below the drug field is a "Quantity Counted" input field, an "Add Qty" button with a checkmark, and a "Finish" button with a red X. The main area of the form is highlighted in green and contains two sections: "Drug" and "Pack".

Drug			
Name	Aleve	DIN	02301733
Generic	Naproxen Sodium	Strength	220mg
Description		Form	CPL (Caplet)
Location		Manufacturer	BAY (Bayer Inc., Consumer C
Pack			
Pack	Active	Cycle Count Date	
Def Vendor/Item	McKesson #008947	UPC	056500359896
Pack Size	50		

- 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**.

Cycle Count Pack

Drug: Aleve 220mg (CPL (Caplet)) F5

Quantity Counted: 100 **Add Qty** Clear Qty

Total Quantity Counted: [Empty]

Drug

Name: Aleve DIN: 02301733

Generic: Naproxen Sodium Strength: 220mg

Description: [Empty] Form: CPL (Caplet)

Location: [Empty] Manufacturer: BAY (Bayer Inc., Consumer C)

Pack

Pack: Active

Def Vendor/Item: McKesson #008947 Cycle Count Date: [Empty]

Pack Size: 50 UPC: 056500359896

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.

Cycle Count Pack

Drug: Aleve 220mg (CPL (Caplet)) F5

Quantity Counted: [Empty] **New Drug** Cancel

Total Quantity Counted: 200

27/08/2014 16:21:25	KRL	100
27/08/2014 16:21:26	KRL	50
27/08/2014 16:21:27	KRL	50

Drug

Name: Aleve DIN: 02301733

Generic: Naproxen Sodium Strength: 220mg

Description: [Empty] Form: CPL (Caplet)

Location: [Empty] Manufacturer: BAY (Bayer Inc., Consumer C)

Pack

Pack: Active

Def Vendor/Item: McKesson #874750 Cycle Count Date: [Empty]

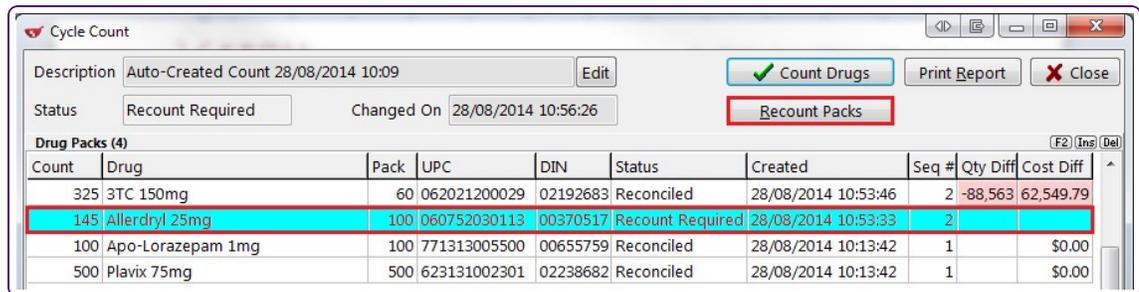
Pack Size: 24 UPC: 005650035988

- Repeat steps 3 to 5 for each drug you want to count.
- 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.

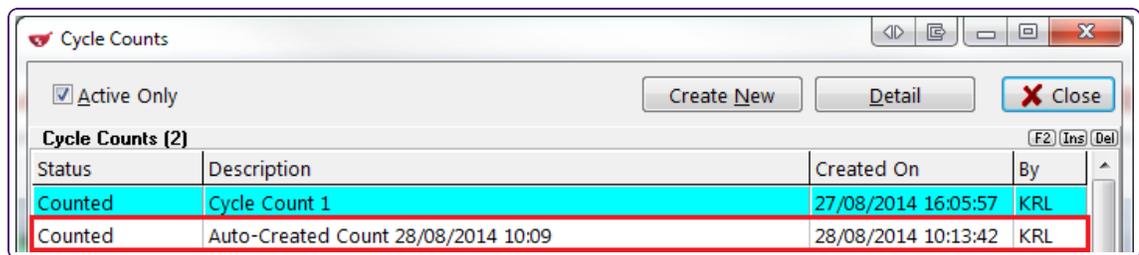
- To recount a drug, highlight the drug record and select **Reconcile**.

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

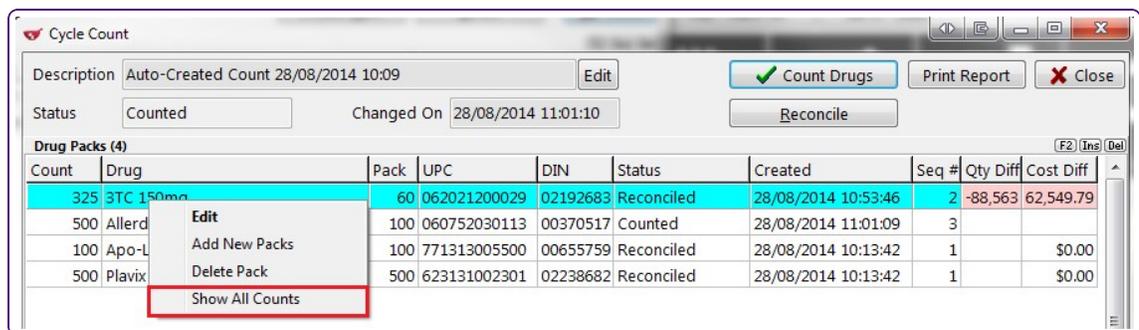


- Highlight the drug record again and select **Count Drugs**.

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.

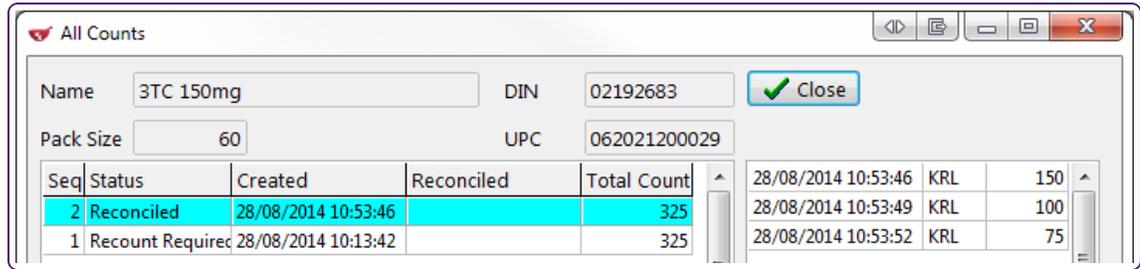


- To view the counts for a drug, call up the **Cycle Count** window, right-click the drug you want to view counts for, and select **Show All Counts**.



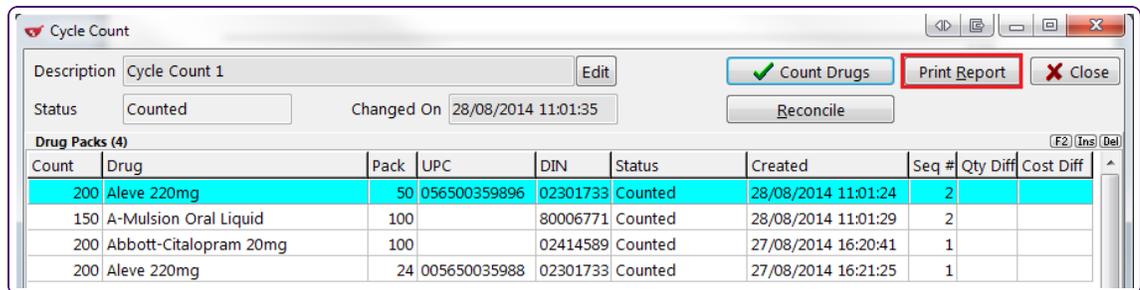
The **All Counts** window appears, displaying all counts for the selected drug.

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

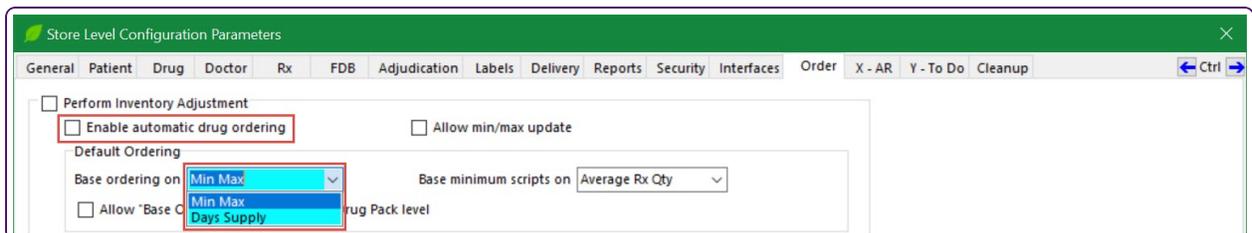
This section describes how to set up File Transfer Protocol (FTP) vendor ordering and receiving.

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 screenshot shows the 'Store Level Configuration Parameters' window with the 'Order' tab selected. The 'Enable automatic drug ordering' checkbox is checked and highlighted with a red box. The 'Base ordering on' dropdown menu is open, showing 'Min Max' and 'Days Supply' options, with 'Days Supply' highlighted in blue. The 'Base minimum scripts on' dropdown is set to 'Average Rx Qty'.

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.

The screenshot shows a software window with several tabs: General, Ordering, UPCs, Plans, Usage, Old Costs, Counselling, Krill Care, and Other. The 'Ordering' tab is active. It displays 'Packs (1)' with a value of 20. Below this is a table for 'Available Vendor Items (0)' with columns for Vendor, Item Num, Description, Case, and Catalog Price. To the right, there are settings for 'On Hand' (0), 'Base Ordering On' (Default (Min Max)), and 'Min Scripts Calc' (Default (Avg.)). A red box highlights the 'On Hand' and 'Minimum' fields. Below these are 'Minimum' and 'Maximum' fields, both set to 0. The 'Order in Multiples of' is set to 1 pack(s). At the bottom, there are 'Usage Values' for 'Daily Usage' and 'Rx Qty Avg' (1), and a 'Last Update' timestamp of 18/10/2024 14:16:30.

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:

The screenshot shows a 'Drug Order Form' window with a green header. It includes a 'Place Order' button and a table of items. The table has columns: Qty, Item Desc, Man, Drug DIN, Pack, Item #, Type, OnHand, Min, Max, Price, and Total. The 'Current Order Value' is \$311.78. The items listed are:

Qty	Item Desc	Man	Drug DIN	Pack	Item #	Type	OnHand	Min	Max	Price	Total
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

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**.

Qty	Item Desc	Man	Drug DIN	Pack	Item #	Type	OnHand	Min	Max	Price	Total
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

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

Vendor	Item Num	Description	Drug DIN	Pack	UPC	Price	Case	Last Updated
--------	----------	-------------	----------	------	-----	-------	------	--------------

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.

Insert Order Item
— □ ×

Vendor ▾

Pack Size ▾

Show inactive

Show deleted

Catalog Items (44) F2 Ins Del

▲	Vendor	Item Num	Description	Drug DIN	Pack	UPC	Price	Case	Last Updated
▶	McKesson	917369	OLANZAPINE TB 5MG 100 APO	02281805	100	771313171298	\$37.75	1	08/02/2024
	McKesson	917468	OLANZAPINE TB 15MG 100 APO	02281848	100	771313171540	\$113.23	1	08/02/2024
	McKesson	810143	HYDRO TB 25MG 100 APO	00326844	100	771313004497	\$1.68	1	08/02/2024
	McKesson	819474	ALENDRONATE TB 70MG BLS 4 A	02248730	4	771313163088	\$7.59	1	08/02/2024
	McKesson	777979	TAMOX TB 20MG 100 APO	00812390	100	771313168502	\$37.28	1	08/02/2024
	McKesson	069204	TRAVOPROST Z OPHT SOL 0.004	02415739	5	771313226134	\$30.63	1	08/02/2024
	McKesson	069205	LINEZOLID TB 600MG 30 APO	02426552	30	771313232586	\$616.77	1	08/02/2024
	McKesson	882720	LANSOPRAZOLE DR CAPS 15MG	02293811	100	771313172486	\$53.25	1	08/02/2024
	McKesson	881490	LANSOPRAZOLE DR CAPS 30MG	02293838	100	771313172479	\$53.25	1	08/02/2024
	McKesson	854042	RALOXIFENE TB 60MG 100 APO	02279215	100	771313171311	\$109.36	1	08/02/2024
	McKesson	730622	AMLODIPINE TB 5MG 500 APO	02273373	500	771313166416	\$71.52	1	08/02/2024
	McKesson	783084	BROMAZEPAM TB 3MG 100 APO	02177161	100	771313078832	\$9.56	1	08/02/2024
	McKesson	738807	FLUVOXAMINE TB 50MG 100 APO	02231329	100	771313127158	\$22.42	1	08/02/2024
	McKesson	738823	FLUVOXAMINE TB 100MG 100 APO	02231330	100	771313127172	\$40.29	1	08/02/2024
	McKesson	015293	LATANOPROST 50MCG/ML OPHT	02296527	2.5	771313248891	\$10.08	1	08/02/2024
	McKesson	070760	ESCITALOPRAM TB 10MG UD 30	02295016	30	771313230445	\$9.94	1	08/02/2024
	McKesson	070802	ESCITALOPRAM TB 10MG 100 AP	02295016	100	771313189941	\$33.12	1	08/02/2024
	McKesson	070808	ESCITALOPRAM TB 20MG UD 30	02295024	30	771313230452	\$10.58	1	08/02/2024
	McKesson	070809	ESCITALOPRAM TB 20MG 100 AP	02295024	100	771313189958	\$35.26	1	08/02/2024
	McKesson	070825	CLARITHROMYCIN XL TB 500MG	02413345	100	771313193832	\$133.90	1	08/02/2024
	McKesson	018786	CLOPIDOGREL TB 75MG UD 30 A	02252767	30	771313163927	\$8.41	1	08/02/2024

More ...

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

Order Quantity

Please specify order quantity for
OLANZAPINE TB 5MG 100 APO

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.

Packs (1)	Vendor	Item Num	Description	Case	Catalog Price
100	McKesson	658476	CARVEDILOL TB 12.5MG 100 TEVA	1	\$21.94

Place Order

Usage Values

Daily Usage

Rx Qty Avg Max

Last Update

Ordering Options:

- No Inventory Adjustment
- Disable Automatic Ordering
- On Hand:
- Base Ordering On:
- Min Scripts Calc:
- Minimum: Days
- Maximum: Days
- Order in Multiples of: pack(s)

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.

Status	Qty	Vendor	Order Date	PO Num
Pending	2	McKesson	18/10/2024	

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 understocked.
- **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.

The screenshot shows the 'Ordering' tab of a drug record. The 'Base Ordering On' dropdown menu is open, showing options: 'Default (Days Supply)', 'Default (Days Supply)', 'Min Max', and 'Days Supply'. The 'Min Max' option is highlighted in blue. The 'Minimum' and 'Maximum' fields are now active and editable, with '0' entered in both. The 'Order in Multiples of' field is set to '1 pack(s)'. The 'Outstanding Orders' table is empty.

Status	Qty	Vendor	Order Date	PO Num
Outstanding Orders (0)				

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 AC1	CBT	02247339	100	297887	M	0	0	0	\$47.44	\$47.44
10	LANOLIN ANHYDROUS DINT 450G	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	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:

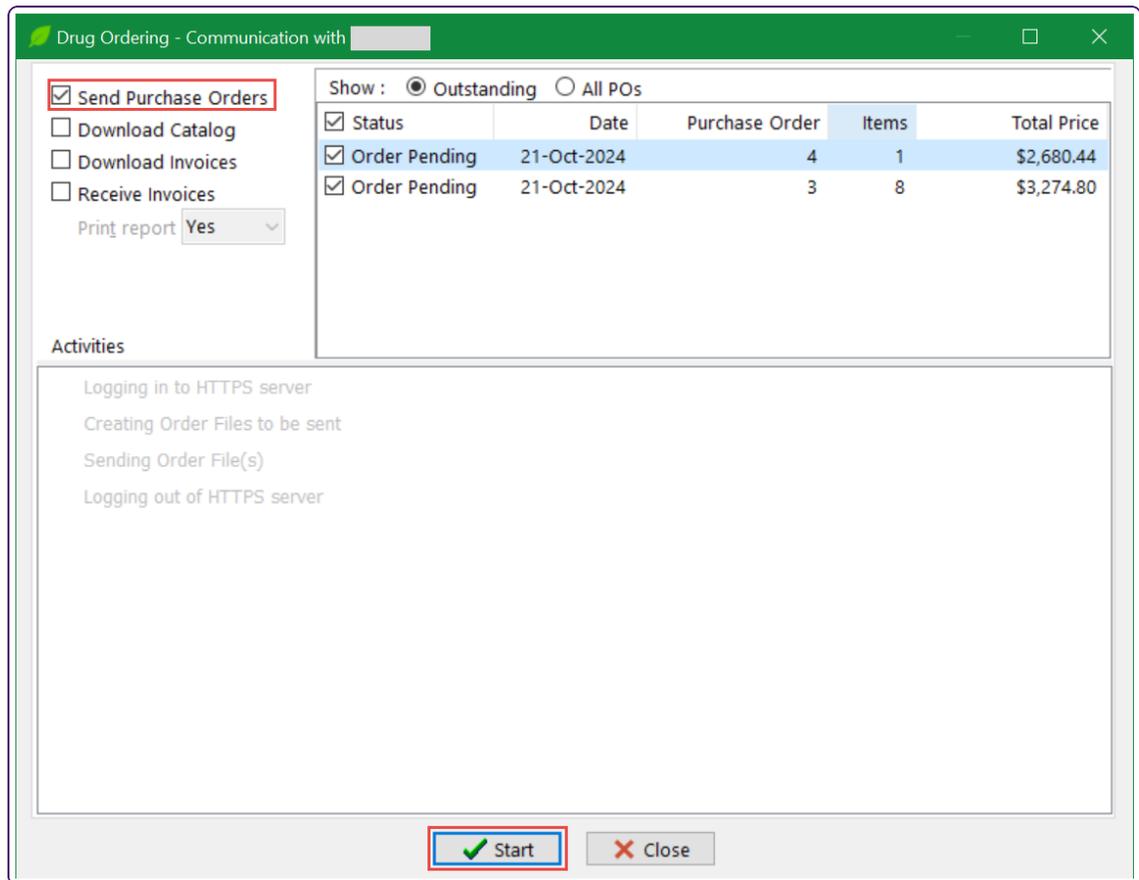


4. Select **Yes**.

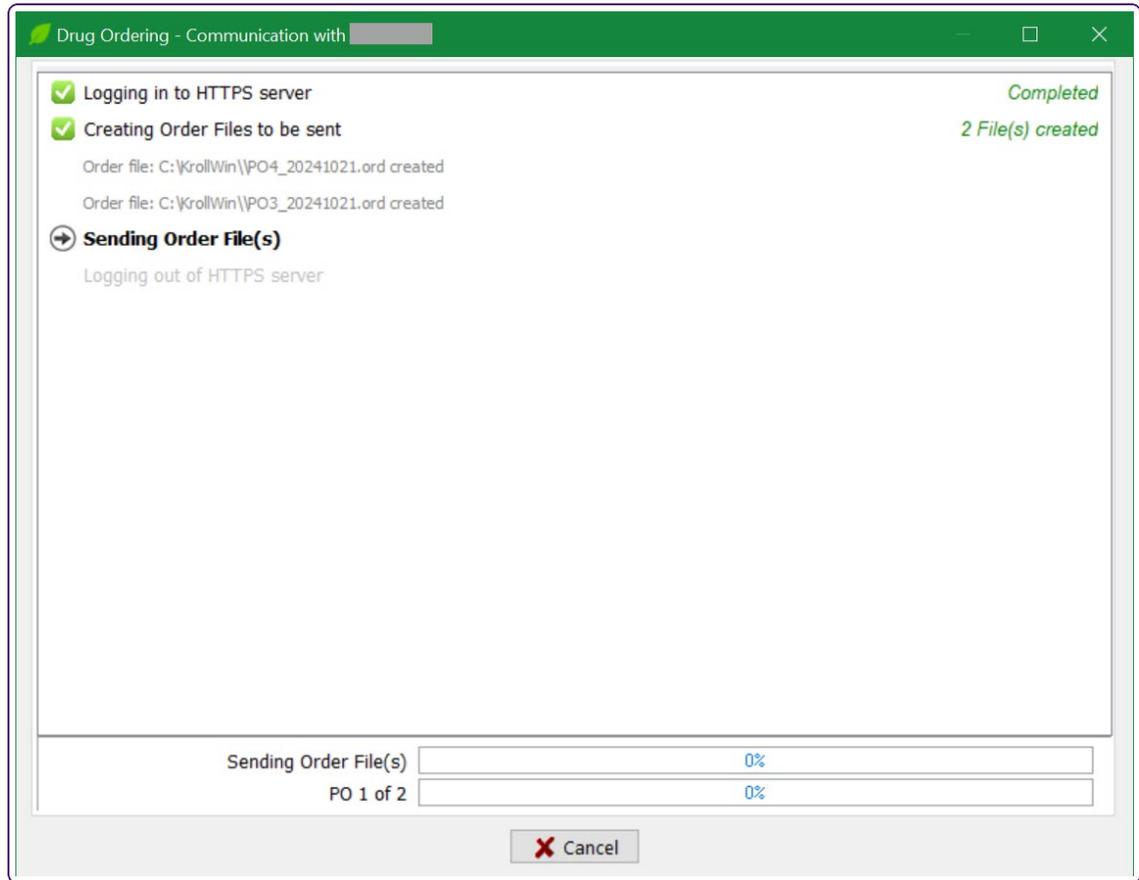
If you select **No**, the order is saved as pending. To send it later, select it from **Utilities > Drug Ordering > Communication with > [Vendor name]**.

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.



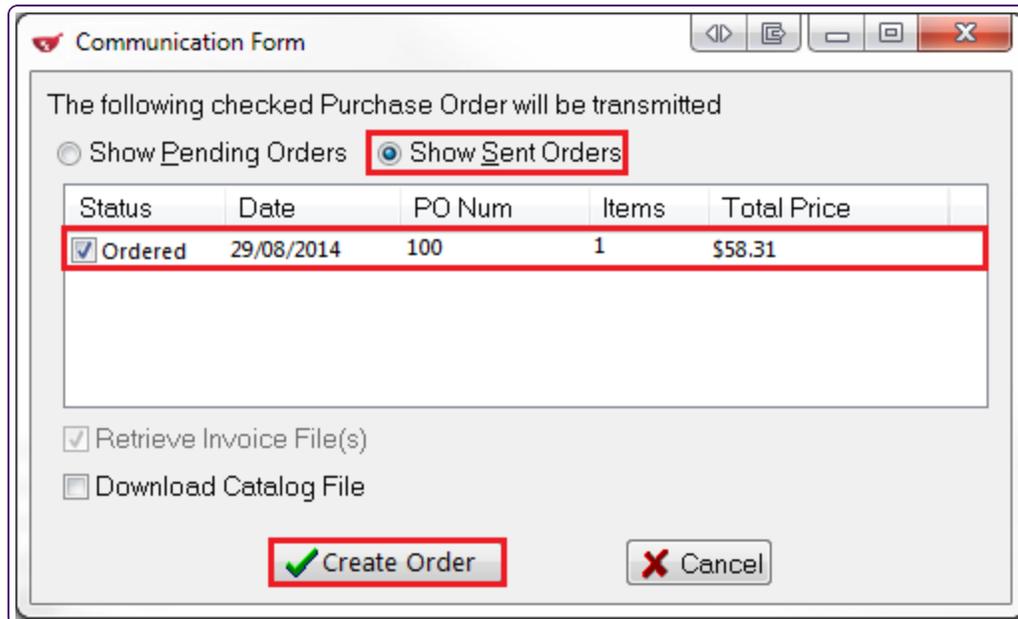
7. When the order has been transmitted successfully, click **Finish** or press Enter to close the communication window.

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.



The following checked Purchase Order will be transmitted

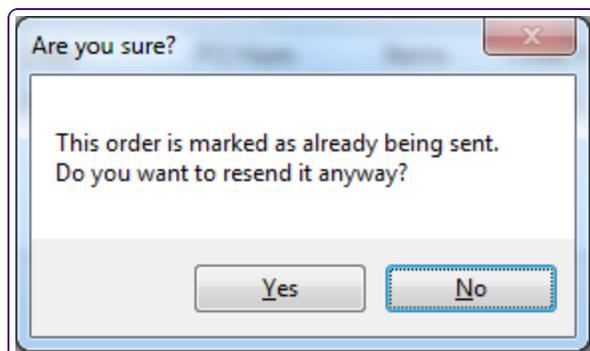
Show Pending Orders
 Show Sent Orders

Status	Date	PO Num	Items	Total Price
<input checked="" type="checkbox"/> Ordered	29/08/2014	100	1	\$58.31

Retrieve Invoice File(s)
 Download Catalog File

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.

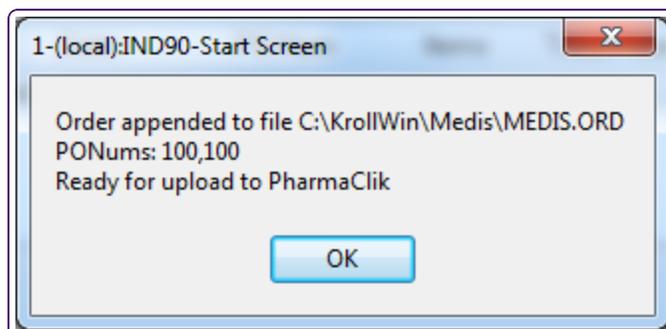
You are then prompted to confirm re-sending the order. Select **Yes** or Press Y.



Are you sure?

This order is marked as already being sent.
Do you want to resend it anyway?

The new order file details are displayed.



1-(local):IND90-Start Screen

Order appended to file C:\KrollWin\Medis\MEDIS.ORD
PONums: 100,100
Ready for upload to PharmaClik

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).

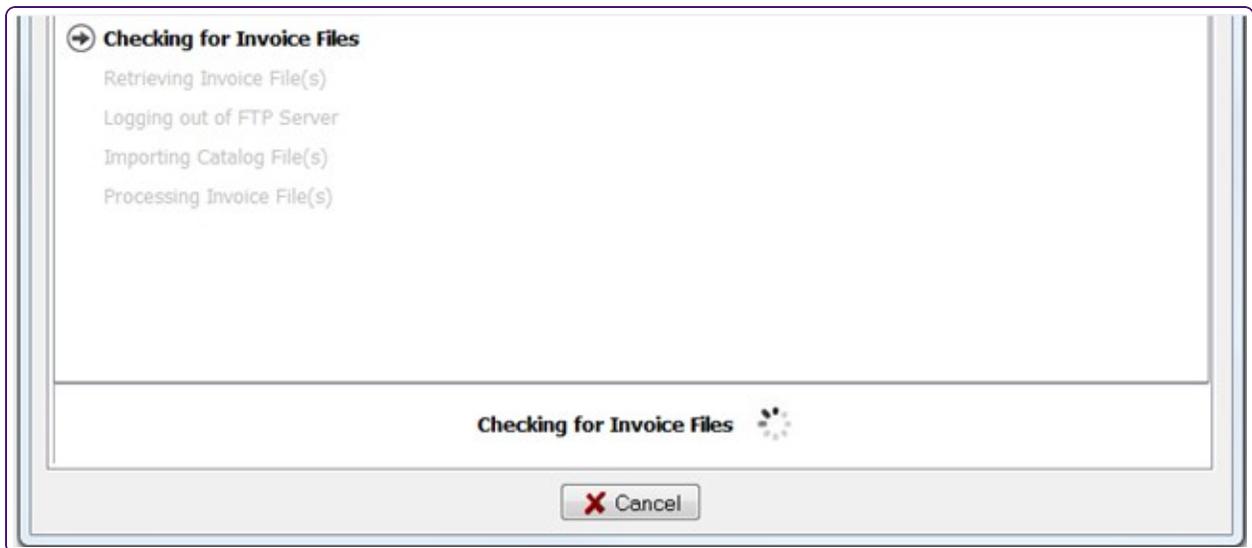
The process of retrieving invoice files consists of three tasks:

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.



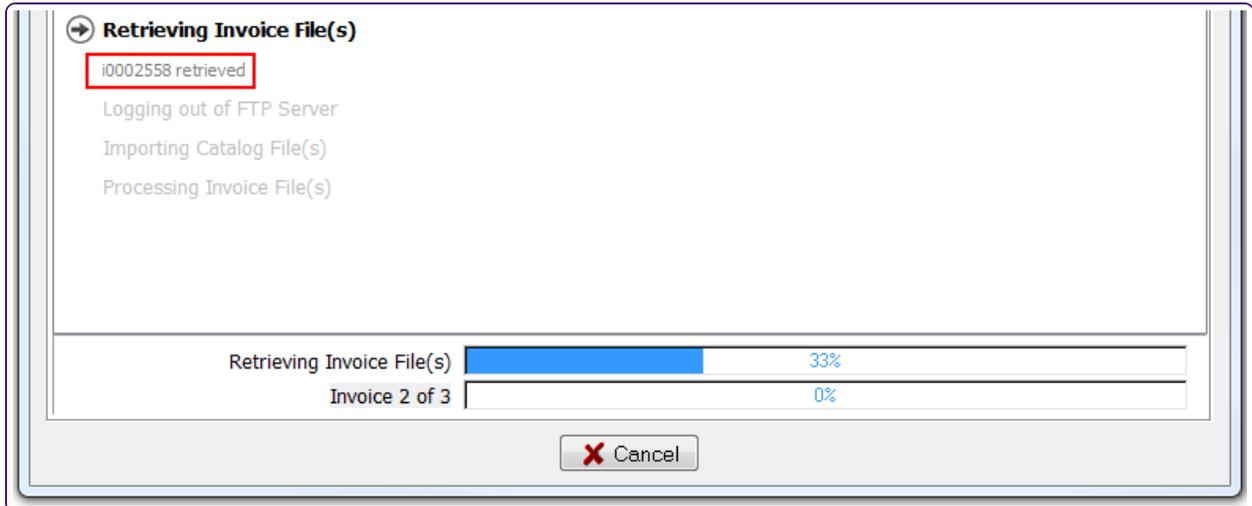
When the **Checking for Invoice File(s)** task is complete, the information panel shows a status of **Completed**, along with the number of invoice files that were found.



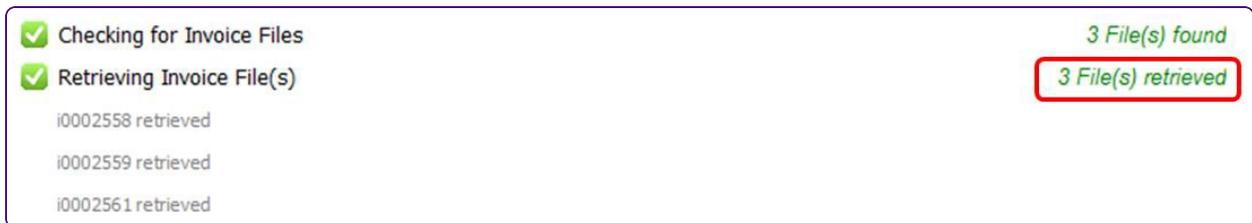
If no files were found, the **Retrieving Invoice File(s)** task is skipped since there are no files to retrieve. Later, the **Processing Invoice File(s)** task is skipped as well.

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.



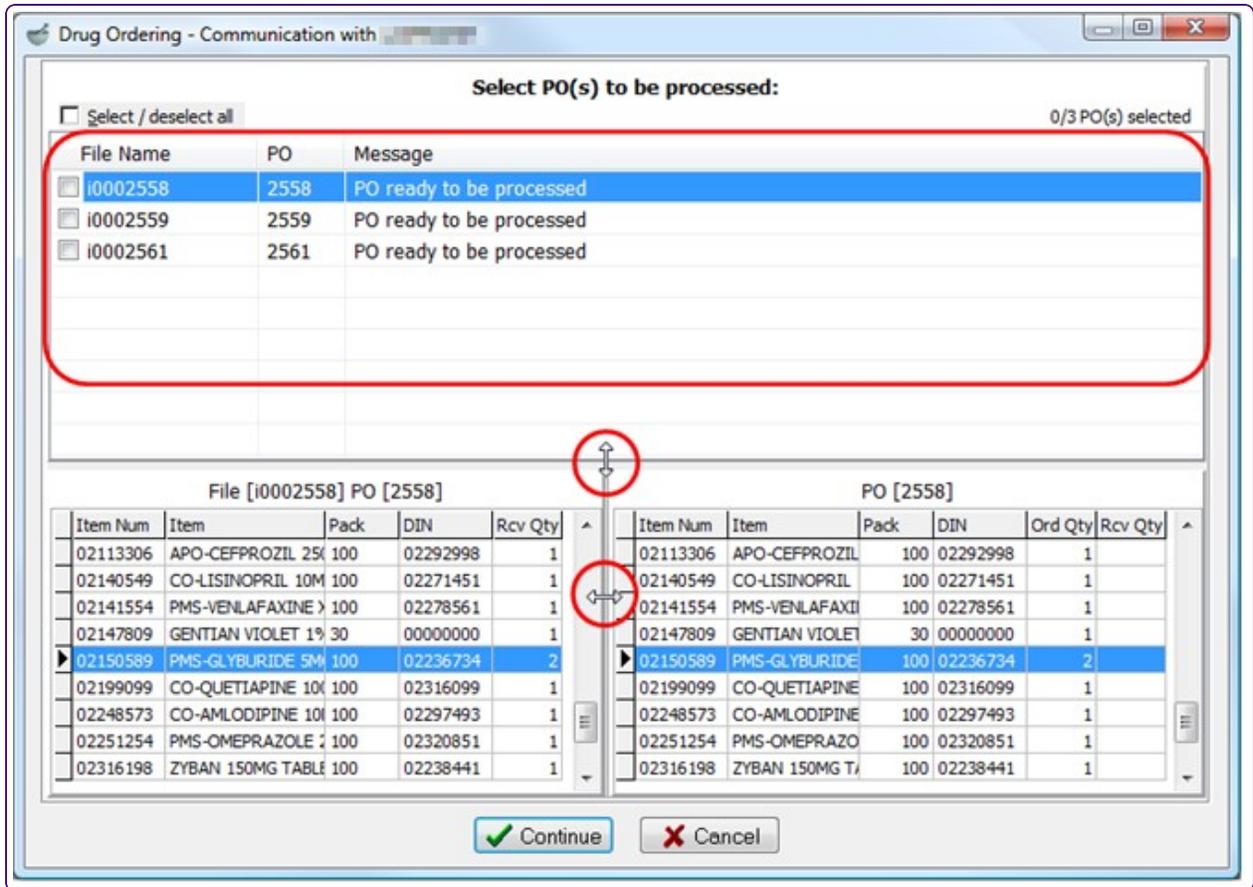
The invoice files are temporarily saved in the designated vendor directory, until they are updated in Kroll.



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.

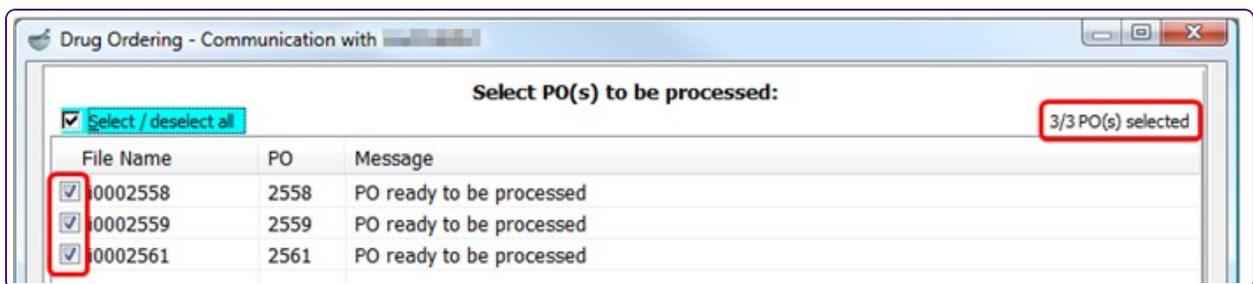
Processing invoice files

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:

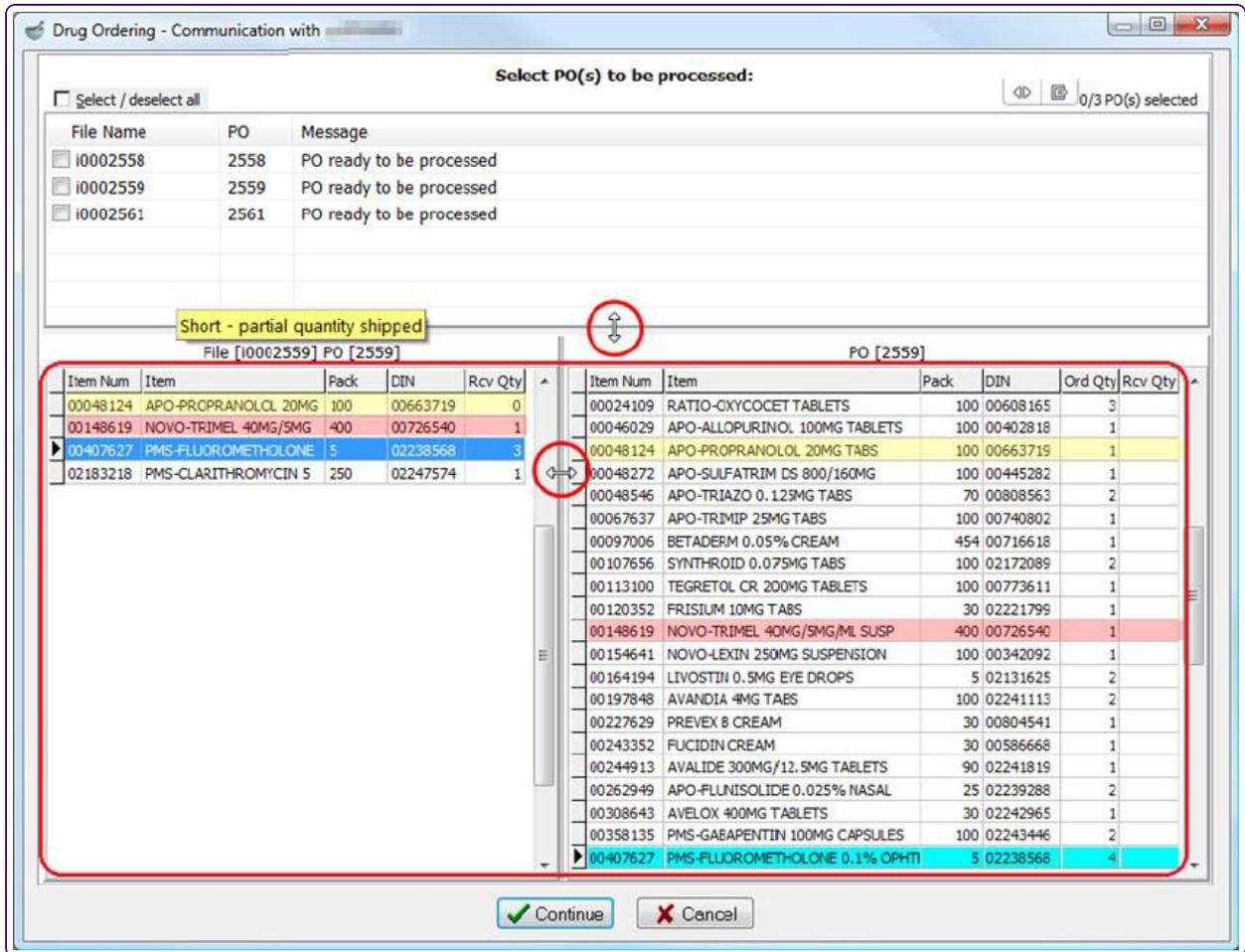


The top panel on this window shows a list of retrieved invoice files with associated PO numbers. Refer to the message to the right of the PO number to help decide which file to process.

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.



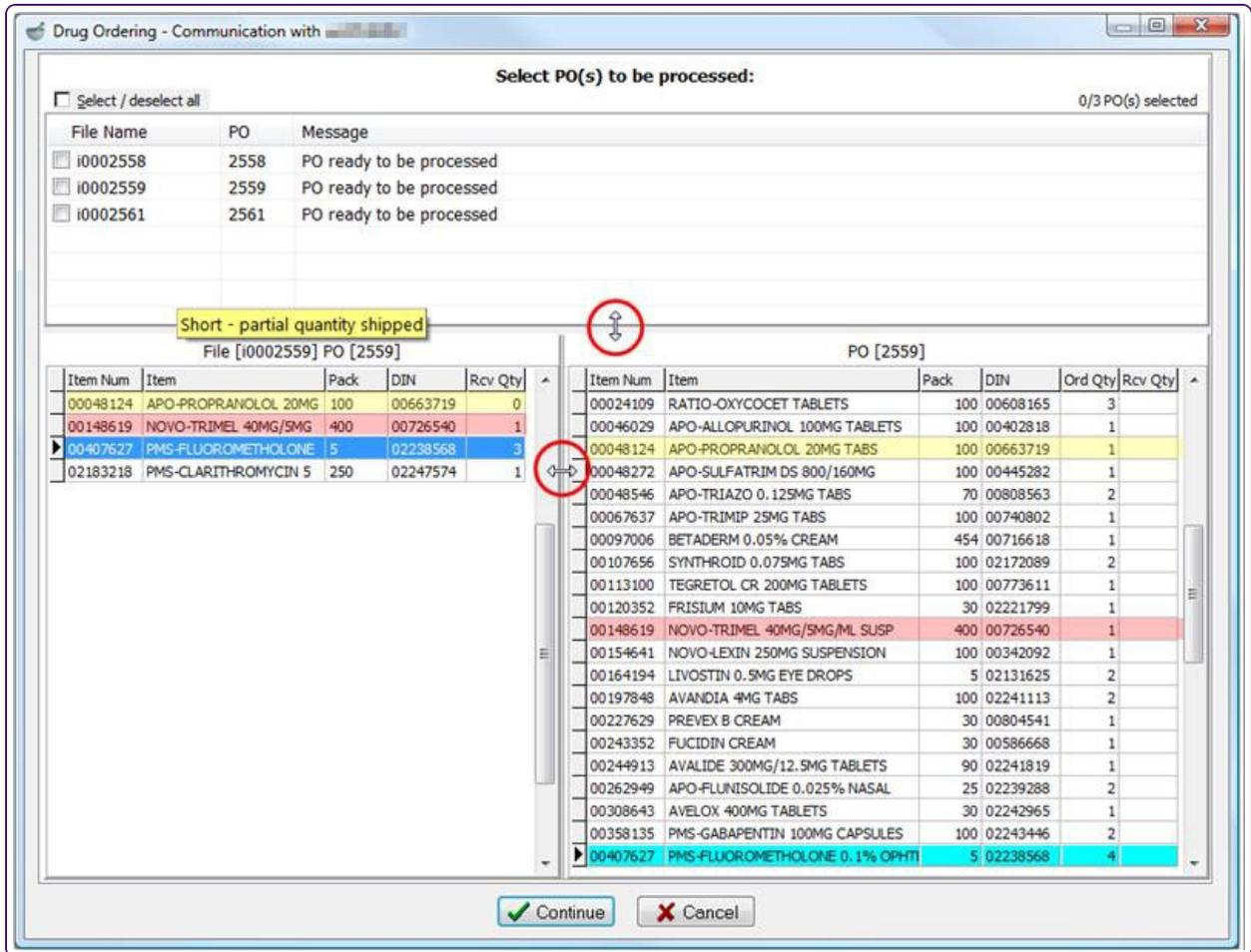
The information in the bottom panel is related to one of the invoice files shown in the top panel. The table on the left displays the information contained in the invoice file. The table on the right displays all the items within a PO in Kroll. You can resize the panels to adjust how much information is displayed.



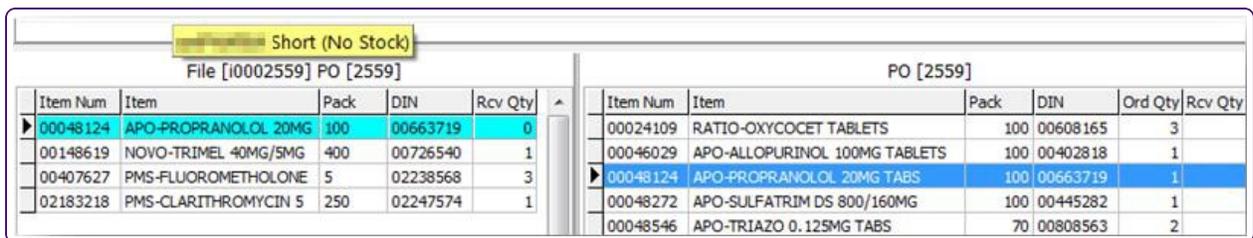
In the above window, the invoice file on the left (i0002559) is associated with PO 2559 on the right. The invoice file contains only four items. The idea is to allow you to compare information inside the invoice file to information in the PO before the file is processed. Selecting any item on either 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						PO [2559]					
File [i0002559] PO [2559]											
Item Num	Item	Pack	DIN	Rcv Qty		Item Num	Item	Pack	DIN	Ord Qty	Rcv Qty
00048124	APO-PROPRANOLOL 20MG	100	00663719	0		00704197	ACULAR LS 0.4% OPHTH. SOLUTION	5	02248722	3	
00148619	NOVO-TRIMEL 40MG/5MG	400	00726540	1		00762856	ZYMAR OPHTHALMIC SOLUTION	5	02257270	3	
00407627	PMS-FLUOROMETHOLONE	5	02238568	3		00776088	APO-BISOPROLOL 5MG TABS	100	02256134	1	
▶ 02183218	PMS-CLARITHROMYCIN 5	250	02247574	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.

Vendor	PO Numbers	# of Items	Downloaded On	By	Status	Received On
	[Inv# 1] - 174	1	02-May-2024 10:59	KX-EA	DownLoaded	

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.

Vendor	PO	Date	User	Status	#Items	Value
	179	29/03/2011 11:30:24	KC	Received	1	\$15.91

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”.

The screenshot shows the 'Vendor Information' dialog box with the 'Receiving' tab selected. The dialog contains the following fields and controls:

- Name:** [Text field]
- Description:** [Text field]
- Phone:** [Text field]
- Fax:** [Text field]
- Vendor Type:** [Dropdown menu]
- Customer #:** [Text field]
- Alternate Customer #:** [Text field]
- Active:**
- Electronic Receiving:** [Dropdown menu]
- Print Receive report:** [Dropdown menu, set to 'No']
- Update Acq Cost:** [Dropdown menu, set to 'Always']
- Update Selling:** [Dropdown menu, set to 'Never']
- Update User Cost 1:** [Dropdown menu, set to 'Never']
- Default Action when PO not found:** [Dropdown menu, set to 'Treat as no stock received']
- Buttons:** OK (with checkmark icon) and Cancel (with X icon).

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”.

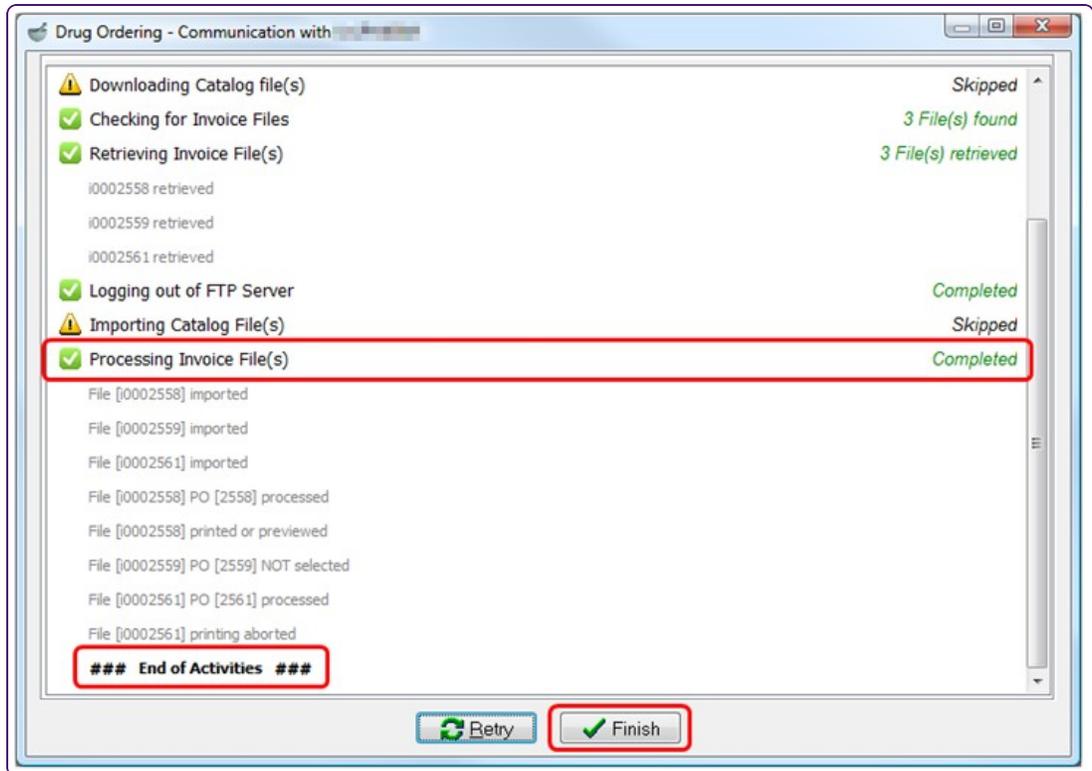
4. Update the catalog prices.

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 screenshot shows a 'Patient Search' window with the following fields:

- Patient Search:** Chevrier, Chiara
- Address:** 1810 Rue De La Bastille
- Date:** 22/10/2024
- Time:** 15:03
- Priority:** F2
- Due:** in 18 mins

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**.

The screenshot shows the main application window with the following sections:

- Navigation:** F3 - Patient, F5 - Drug, F7 - Doctor, F9 - Workflow, F10 - Pickup, F11 - Drop-off, F12 - Fill Now, Alt+X - Start
- Patient Search:** Chevrier, Chiara, DOB: 17/12/1958, Age: 65 years, Gender: Female, Address: 1810 Rue De La Bastille, RAMQ: CHECS9621713
- Date/Time/Priority:** Date: 22/10/2024, Time: 15:03, Priority: F2, Due: in 18 mins
- Delivery:** Pickup
- Work Order:** 107
- Drop-off Window:**
 - Import Script Image File
 - Import Script Image from fax scan
 - Select Script Image
- New Rx Window:**
 - Doctor: [Empty]
 - Name: [Empty]
 - Address: [Empty]
 - Drug/Mix: [Empty]
 - Strength: [Empty]
 - Form: [Empty]
 - OnHand: 0
 - Sig: [Empty]

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.

The screenshot shows a software interface for entering a prescription. At the top, there are function keys: F3 - Patient, F5 - Drug, F7 - Doctor, F9 - Workflow, F10 - Pickup, F11 - Drop-off, F12 - Fill Now, and Alt+X - Start. The main form contains fields for Patient Search (Chevrier, Chiara), DOB (17/12/1958), Age (65 years), Address (1810 Rue De La Bastille), Gender (Female), and RAMQ (CHECS8621713). Below these are Date (22/10/2024), Time (15:03), Due (in 8 mins), and Delivery (Pickup). A Work Order field shows 107. On the right, a 'Drop-off' menu is open, listing 'Re-Import Script Image File', 'Clear Script Image' (highlighted with a red box), and 'Fax Rx Transfer-In Request'.

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.

The screenshot shows a 'Workorder items' window. On the left, there are two tabs: 'Rx' and 'Note', with 'Note' selected and highlighted with a red box. The main area is empty. At the bottom left, there is a 'Clear All' button with a red 'X' icon. At the bottom right, there is a 'Finalize Work Order' button with a checkmark icon.

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**.

The screenshot shows the F11-Drop-off window with the following details:

- Navigation:** F3 - Patient, F5 - Drug, F7 - Doctor, F9 - Workflow, F10 - Pickup, F11 - Drop-off, F12 - Fill Now, Alt+X - Start
- Patient Search:** Chevrier, Chiara; DOB: 17/12/1958; Age: 65 years; Phone: [blank]; Address: 1810 Rue De La Bastille; Gender: Female; RAMQ: CHECS8621713
- Date/Time:** 22/10/2024, 15:03; Due: in 8 mins; Delivery: Pickup; Work Order: 107
- Refill Rx:** RxNum [blank], Lookup button, Ready for lookup
- New Rx Form:**
 - Doctor: Dr. Abadir, Sylvia; Address: Hôpital Sainte-Justine, 3175; Lic#: 111091
 - Drug/Mix: [blank]; Name: [blank]; Strength: [blank]; Form: [blank]; OnHand: 0
 - Sig: [blank]; Init: KP
 - Disp Qty: [blank]; Refills: [blank]; Auth Qty: [blank]
 - Days Supply: [blank]; Unlimited Refills Until: [blank]
 - Rx Status: Fill; Written Date: [blank]
 - Rx Comment: [blank]
 - Buttons: Add (highlighted), Cancel
- Workorder items (1):**

#	Action	Patient	Drug	Doctor
1	New Rx	Chevrier, Chiara	Acebutolol/Acebutolol 200mg	Abadir, Sylvia
- Bottom Bar:** Clear All (with X icon), Finalize Work Order (with printer icon and highlighted)

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.

The screenshot displays the 'Data Entry > Drop-off' interface. At the top, there are navigation tabs: F3 - Patient, F5 - Drug, F7 - Doctor, F9 - Workflow (selected), F10 - Pickup, F11 - Drop-off, F12 - New Rx, and Alt+X - Start. Below the tabs is a summary table for 'Show Rx's from' with columns: Overdue, 0-1 hrs, 1-4 hrs, 4+ hrs, Tomorrow, Trouble, and Total. The 'Data Entry' row is highlighted in purple and has a red box around the 'Data Entry' checkbox. A 'Get Work' button with a green checkmark is highlighted with a red box. Below the summary table is a section for 'Rx's In Progress' with a 'Refresh' button and keyboard shortcuts: space - Mark Rx(s), F - Call up Rx(s), Del - Delete. The table below shows three rows of data with red boxes around the 'Due' column values.

Show Rx's from		Overdue	0-1 hrs	1-4 hrs	4+ hrs	Tomorrow	Trouble	Total
<input checked="" type="checkbox"/>	Data Entry	18	0	0	0	0	0	18
<input type="checkbox"/>	Packaging	8	0	0	0	0	0	8
<input type="checkbox"/>	Pharmacist Verification	2	0	0	0	0	0	2
<input type="checkbox"/>	Incomplete Pickup	0	0	0	0	0	0	0

Rx's In Progress

#	Tote	Due	RxNum	WO #	Patient	BrandName	Doctor	Next Workflow Action	Trouble Comment
1		19 days ago	1000120	121	Tagnaouti Moumnani	Abenol 650mg	Attaalla, Fayek	Complete Adjudication	
2		19 days ago	1000121	122	Chevrier, Chiara	Abenol 650mg	Attali, Dana	Complete Adjudication	
3		6 days ago	1000122	124	Tagnaouti Moumnani	Acebutolol 100mg	Attarian, Armen	Complete Adjudication	A Workflow Action Fa

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.

Rx Order / Dispense Information [Close]

Rx Order

Note
[Redacted]

Patient Measurement - Height [] [v] **Patient Measurement - Weight** [] [v]

Treatment Type [one time] [v] **Substitution Not Allowed Reason** [Not specified] [v]

Dispense

Note
[]

Substitution Type [None] [v] **Substitution Reason** [Not specified] [v]

Quantity Units of Measure
[Suppository]

Emergency fill

DSQ Pharmacist Prescribe Reasons (optional; select 0 or more reasons)

Reason for Extending the Order [<Not specified>] [v]

Adjustment Reason [<Not specified>] [v]

Therapeutic Substitution Reason [<Not specified>] [v]

No Diagnosis Reason [<Not specified>] [v]

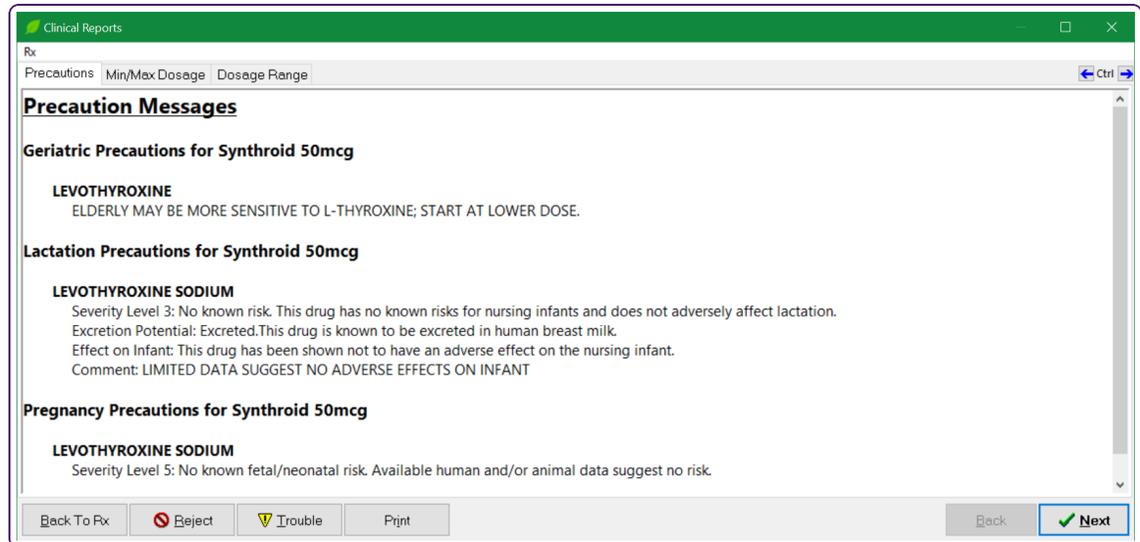
Minor Condition [<Not specified>] [v]

[OK] [Cancel]

- 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.



- 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.

- 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.
- Select **Finished**.

The **Rx Order** window is displayed again.

- Review it and select **OK**.
- Select **F12 - Fill Rx**.

A confirmation message is displayed indicating that the Create Rx Order was successful.

- Select **OK**.

A confirmation message is displayed indicating that the Dispense Rx was successful.

- 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.

Plans	Pricing	Dates	Comments	Indications	Images	Other
Strategy	<input type="text" value="Price Not Calculated"/>	Acq Cost	<input type="text"/>			
Unit Dose Strategy	<input type="text"/>	G.P. %	<input type="text" value="0"/>			
		Unit drug cost	<input type="text"/>			
<input type="checkbox"/> Manual Price						
	Cost	Markup	Fee	Mix Fee	SSC	Total
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="\$0.00"/>
Discounts	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="\$0.00"/>
Net Amounts	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>

Dates

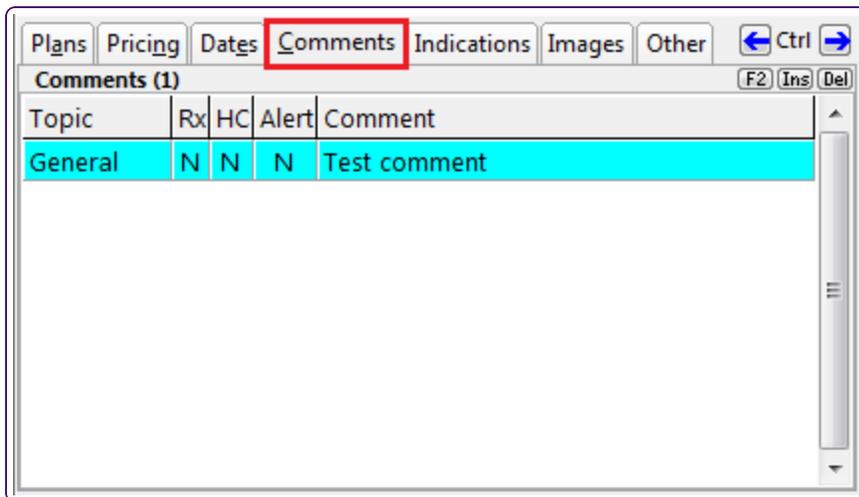
Plans	Pricing	Dates	Comments	Indications	Images	Other
Written	<input type="text" value="23/10/2024"/>					
<input type="checkbox"/> Dispensing allowed period						
Start	<input type="text" value="23/10/2024"/>					
Stop	<input type="text" value="23/10/2025"/>					
<input checked="" type="checkbox"/> Administration period						
Start	<input type="text" value="23/10/2024"/>					
Stop	<input type="text"/>					
Drug expiry	<input type="text"/>					
Ingest	<input type="text"/>					
Copy Information						
Therapeutic start	<input type="text"/>					
From Rx	<input type="text"/>					
To Rx	<input type="text"/>					
Transferred						
In	<input type="text"/>					
Out	<input type="text"/>					

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**, then select the applicable workflow.

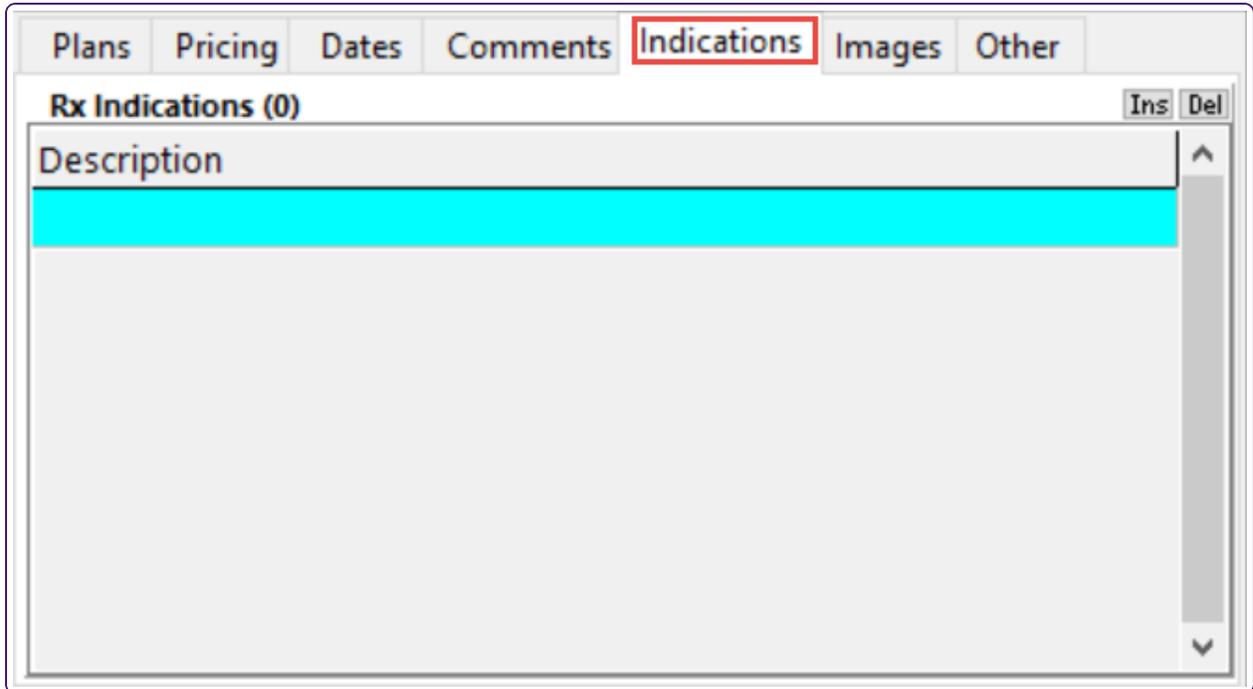


If you select more than one workflow, it will only be displayed on the first workflow unless you escape out of the Rx and return to it for the next workflow.

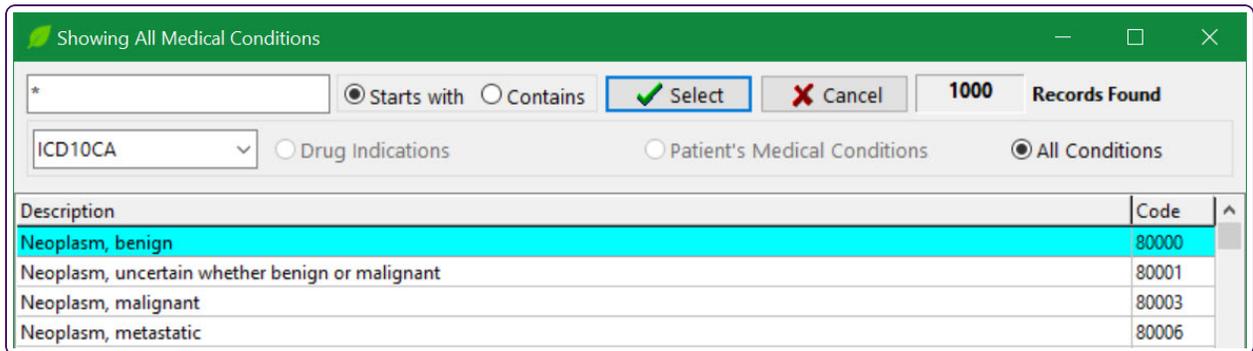
10. Select **Save**.

Indications

The **Indications** tab allows you to identify which condition the prescription is treating.



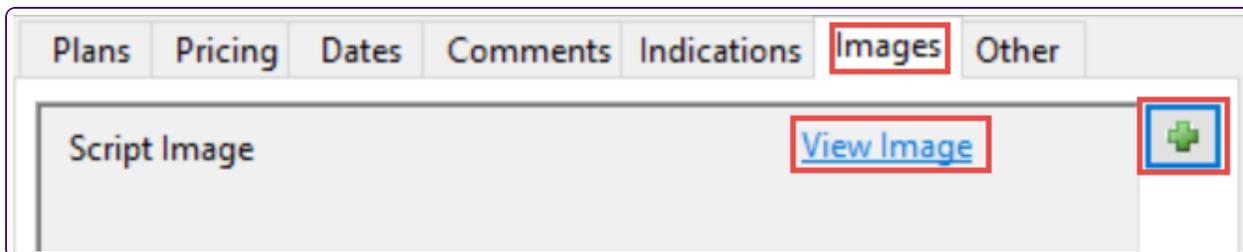
When you select **Ins** or press Insert, a list of ICD- 10-CA and/or FDB conditions is displayed.



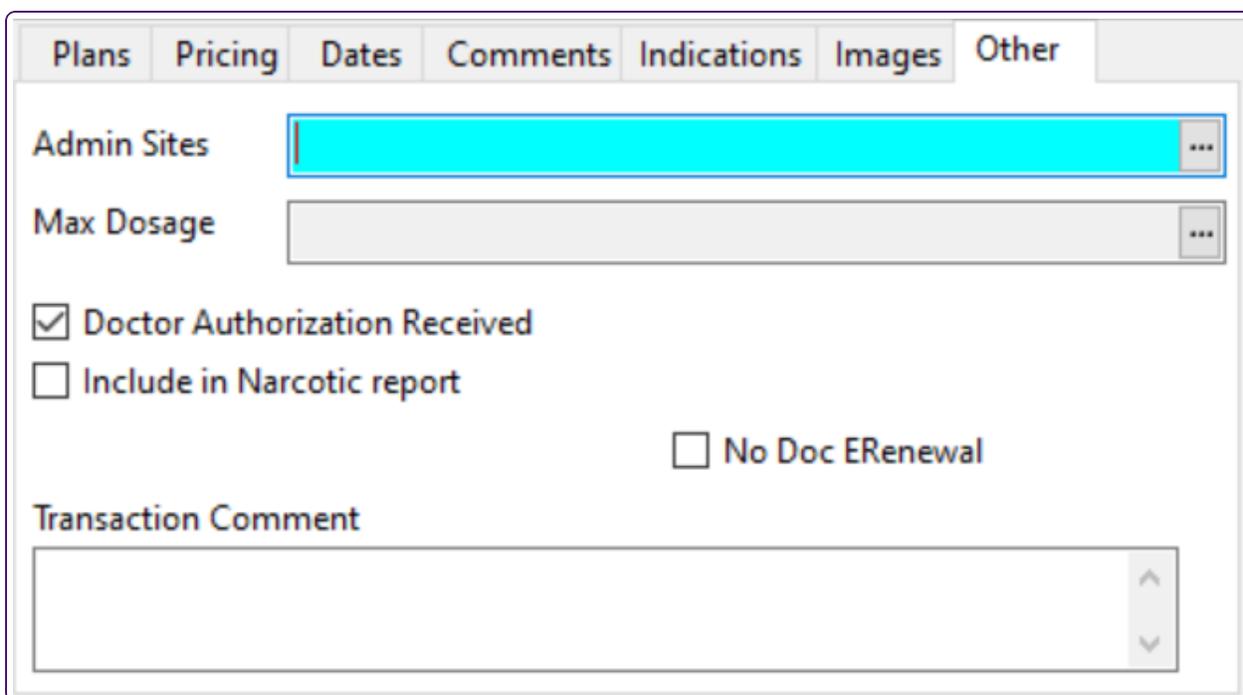
Highlight the indication you want to apply to the prescription and click **Select**.

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 Rx's.

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.

The screenshot displays the 'Alt-X - Start' window with the following components:

- Navigation Tabs:** F3 - Patient, F5 - Drug, F7 - Doctor, F9 - Workflow (selected), F10 - Pickup, F11 - Drop-off, F12 - New Rx, Alt+X - Start.
- Summary Table:**

Show Rxs from	Overdue	0-1 hrs	1-4 hrs	4+ hrs	Tomorrow	Trouble	Total
<input type="checkbox"/> Data Entry	16	0	0	0	0	3	19
<input checked="" type="checkbox"/> Packaging	10	0	0	0	0	0	10
<input type="checkbox"/> Pharmacist Verification	2	0	0	0	0	0	2
<input type="checkbox"/> Incomplete Pickup	0	0	0	0	0	0	0
- Buttons:** Show/Hide Queues, Get Work (highlighted with a green checkmark).
- Workflow Actions Panel:** Get Work (highlighted), Waiting for Pickup, Pending Adjudication (16), Trouble (3), Rx Counseling (5), Professional Services (5), Immunizations (6).
- Rx's In Progress Table:**

#	Total	Due	RxNum	WO #	Patient	BrandName	Doctor	Next Workflow Action	Trouble Comment
1		in 4 mins	1000131	130	Chevrier, Chiara	Tylenol 500mg	Beaudoin, Helene	Package Rx	
2		in 18 mins	1000132	130	Chevrier, Chiara	Xylocaine 1%	Beaudoin, Helene	Package Rx	

- 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.

The screenshot shows the 'Package Rx' window with the following details:

- Navigation:** F3 - Patient, F5 - Drug, F7 - Doctor, F9 - Workflow, F10 - Pickup, F11 - Drop-off, F12 - Return to Rx, Alt+X - Start
- Header:** Rx Number 1000132, Due in 17 mins, Tote No Tote, Work Order 130, F2 Fill Regular Rx (THAdvancedV), Script Image No Ref #
- Patient:** Chevrier, Chiara
- Drug Information:**
 - Brand Name: Xylocaine, Strength: 1%
 - Generic Name: Lidocaine
 - Form: ML (Injection), Schedule: 1 (Annexe 1 [F])
 - Manufacturer: AZC (Astra-Zeneca Canada Inc), Description: Prefilled Syringe
 - Location: [Empty], Description 2: [Empty]
- Image:** No image available (Placeholder for a white syringe)
- Summary:** Total to Package 50, Qty Packaged 0, Qty Owed 0, Owe Labels 1, F2
- Packaging:** Pack Size 12, Qty Left To Package 50 ML
- DIN:** [Redacted], Lookup, There are more packages to scan.
- Buttons:** Qty, Expiry Date, Lot, Package, Cancel
- Packaging Details:** Pack Size 12, Qty to Package 50, Qty Packaged 0, On Hand 10, Inv. Used 0
- Workflow Note:** [Empty]
- Alerts:** Save for Later, Cancel Rx, Trouble, Reject, Packaged
- Right Panel:** View, Workflow Detail, Change Pack Sizes, Profile, All Rxs, Active Rxs, Pricing Profile, Not Disp/OTC Profile, Therapeutic Equivalents, Rx, Counsel Patient on Pickup, Workflow Push Queues, Data Entry, Packaging, Pharmacist Verification, Incomplete Pickup

- 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.

Edit Rx Owe

Rx Pack Quantity	Pack Size	Qty to Package	Package Now	Owe Later	On Hand Qty
	12	50	50	0	10

Label Quantity

Vial Labels

Owe Workflow Due Date

Priority Due

Owe Workflow Trouble Status

Keep Rx in Trouble Until

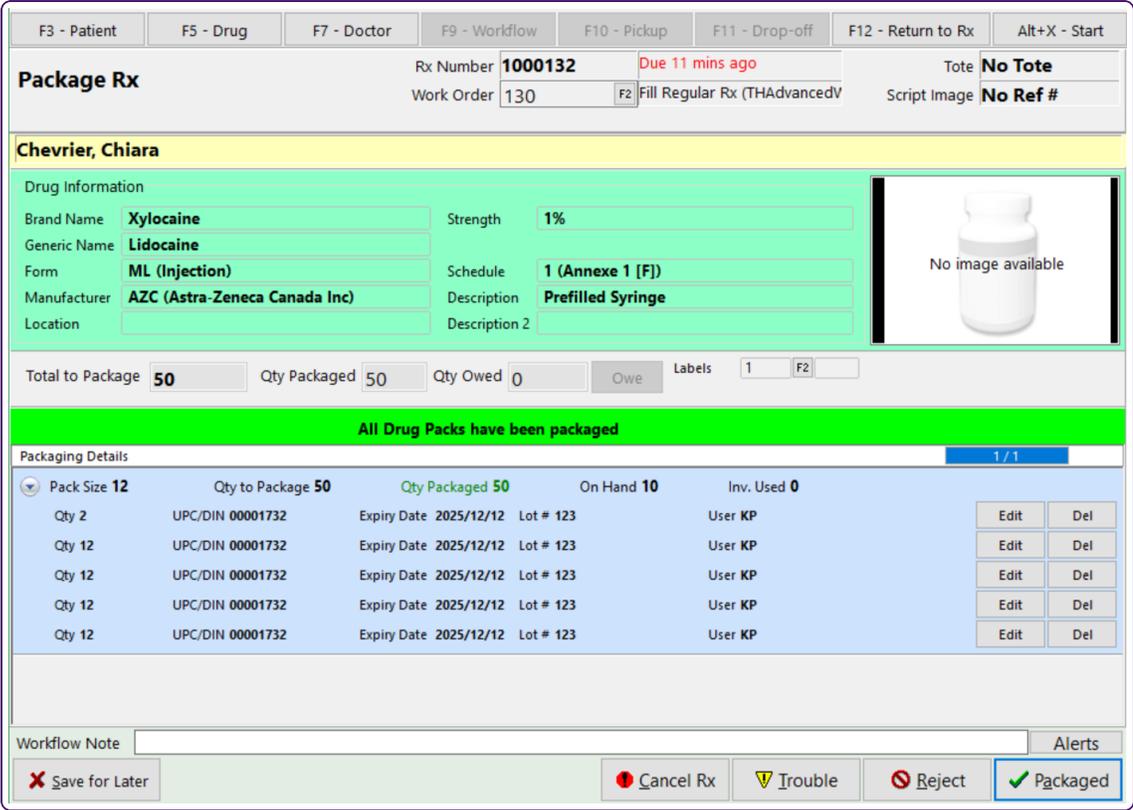
Comment

Owe Label Quantity

Vial Labels

- 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.

The screenshot shows the 'Clinical Verification' window with the following details:

- Header:** Rx Number 1000134, Due in 7 mins, Tote No Tote, Work Order 136, Fill Regular Rx (THAdvancedV), Script Image No Ref #.
- Navigation:** F3 - Patient, F5 - Drug, F7 - Doctor, F9 - Workflow, F10 - Pickup, F11 - Drop-off, F12 - Return to Rx, Alt+X - Start.
- Verification Tabs:** Clinical Verify (selected), Financial, Rx Images, Workflow, Packaging.
- Patient Info:** Patient Chevrier, Chiara, DOB 17/12/1958, Age 66, Sex Female.
- Drug Info:** Brand Xylocaine 1%, Generic Lidocaine, DIN 00001732, Pack 12 Form ML, Schedule 1.
- Doctor Info:** Ph. Beaudoin, Helene, Lic # 489120, Ref ID 56, Loc Bureau, Ph.
- AS NEEDED:** Qty 23, Days Supply 23, O/W.
- Auth Info:** Auth Qty 46, Rem Qty 23, Ago 2, 1.
- Interactions:** DUP/THP - Antiarrhythmic - Class IB (Systemic).
- Rx Messages:** NEW RX, No Script Image.
- Rx List Table:**

#	Status	Orig Rx	RxNum	Date	Ago	Qty	Auth	Rem	BrandName	Doctor
1		1000134	1000134	29/01/2025	0	23	46	23	Xylocaine 1%	Beaudoin, Helene
2		1000132	1000132	29/01/2025	0	50	50	0	Tylenol 500mg	Beaudoin, Helene
3	Inact	1000131	1000131	29/01/2025	0	30	30	0	Retin A 0.025%	Beaudoin, Helene
- Workflow Note:** Alerts
- Buttons:** Save for Later, Cancel Rx, Trouble, Reject, Next (highlighted).
- Right Panel:** View, Clinical Interactions, Network Profile, Adjudication Results, Patient Charting, Patient Documents (0), Profile, All Rxs (17), Active Rxs, Pricing Profile, Not Disp/OTC Profile, Therapeutic Equivalents, Rx, Counsel Patient on Pickup, Workflow Push Queues, Data Entry, Packaging, Pharmacist Verification, Incomplete Pickup.

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.

F3 - Patient	F5 - Drug	F7 - Doctor	F9 - Workflow	F10 - Pickup	F11 - Drop-off	F12 - New Rx	Alt+X - Start
Use the check mark to select the items that the patient wants to pickup.							Patient Pays: \$72.39
<input type="button" value="Back"/>		<input type="button" value="Start Over"/>		Please select Rxs to pick up		<input type="button" value="Rx Info"/>	<input type="button" value="Family"/>
Chevrier, Chiara (Female, 66)							
<input checked="" type="checkbox"/>	Apo Atorvastatine 10mg Rx: 1000050	Waiting for Pickup		Mon Mar 25			\$20.19
<input checked="" type="checkbox"/>	Apo Citalopram 20mg Rx: 1000053	Waiting for Pickup		Mon Apr 1			\$14.92
<input checked="" type="checkbox"/>	Apo Ramipril 2.5mg Rx: 1000042	Waiting for Pickup		Mon Mar 25			\$15.30
<input checked="" type="checkbox"/>	Xylocaine 1% Rx: 1000132	Waiting for Pickup		Wed Jan 29			\$10.99
<input checked="" type="checkbox"/>	Xylocaine 1% Rx: 1000134	Waiting for Pickup		Wed Jan 29			\$10.99
	Abenol 650mg Rx: 1000121	Data Entry		21 days ago			In Progress
	Act Rosuvastatin 5mg Rx: 1000123	Packaging		10 months ago			In Progress
	Apo Ramipril 2.5mg Rx: 1000119	Packaging		1m 11d ago			In Progress
	Balminil Decongest 0.1% Rx: 1000109	Packaging		3 months ago			In Progress
	Retin A 0.025% Rx: 1000130	Packaging		1h 30m ago			In Progress
	Synphasic Rx: 1000129	Packaging		1h 38m ago			In Progress
	Tylenol 500mg Rx: 1000131	Packaging		1h 19m ago			In Progress

2. Select the prescriptions the patient is picking up, then select **Pickup # Items**.

A confirmation window is displayed.

F3 - Patient	F5 - Drug	F7 - Doctor	F9 - Workflow	F10 - Pickup	F11 - Drop-off	F12 - New Rx	Alt+X - Start
There are 2 additional items that are waiting for pickup but were NOT selected. There are 11 additional items that are still in progress.							
							Patient Pays: \$61.40
<input type="button" value="Back"/>		<input type="button" value="Start Over"/>		Please confirm items to pick up		<input type="button" value="Confirm 4 Items"/>	
Rx: 1000050	Chevrier, Chiara	Apo Atorvastatine 10mg					\$20.19
Rx: 1000053	Chevrier, Chiara	Apo Citalopram 20mg					\$14.92
Rx: 1000042	Chevrier, Chiara	Apo Ramipril 2.5mg					\$15.30
Rx: 1000132	Chevrier, Chiara	Xylocaine 1%					\$10.99

3. Select **Confirm # Items**.

The selected Rxs are now complete.

Chapter 17

Refill Rx

Refillable Rx's 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 Rx's** 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.

The screenshot shows a software interface for prescription management. At the top, there are function keys: F3 - Patient, F5 - Drug, F7 - Doctor, F9 - Workflow, F10 - Pickup, F11 - Drop-off, F12 - Return to Rx, and Alt+X - Start. Below these, patient information is entered: Last Name 'Blondel', First Name 'Élina', and Salutation. A green 'OK' button and a red 'Cancel' button are visible. The main area is titled 'Profile - Refillable (1)' and contains a table with prescription details:

#	Status	Orig Rx	RxNum	Date	Ago	Qty	Auth	Rem	BrandName	Doctor	Sig
1	Backdated	1000054	1000054	01/04/2024	155	14	140	126	Apo Citalopram 20mg	Dumais, Guy	*1

A modal dialog box is open in the center, titled 'Please Enter a Due Date and Delivery Route'. It contains the following fields:

- 'Due Date for the Rxs' dropdown menu set to 'Default Wait Time' (you can enter 20m/3h/2d).
- Date and time fields: 03/09/2024, 11:25.
- 'Due' field: in 20 mins.
- Comments text area.
- 'Delivery Route' dropdown menu set to 'Pickup'.
- Radio buttons for 'New work order' (selected) and 'Existing work order' (Work Order: 72 (03/09/2024)).
- 'OK' and 'Cancel' buttons.

Below the modal, there are sections for 'Allergies (0)', 'Medical Conditions (0)', and 'Groups (1)'. At the bottom, there are various settings including 'Deceased On', 'Prescriptions' (Delivery Type: Default (Pickup), Delivery Route, Price Group: <None>), 'Drug line 1' (Default (Brand), 2 Default (Generic)), 'Double Count' (Not Required), and checkboxes for 'No Kroil Care', 'No Wallet Card', 'Compliance Calendar on Label', 'Snap Caps Requested', and 'Snap Caps Documented'.

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.

The screenshot shows a software interface with a top navigation bar containing buttons for F3 - Patient, F5 - Drug, F7 - Doctor, F9 - Workflow, F10 - Pickup, F11 - Drop-off, F12 - New Rx, and Alt+X - Start. Below the navigation bar are several input fields for patient information: Patient Search, Address, DOB, Age, Phone, Gender, and Plan. A 'Due' field is highlighted in yellow. Below these fields, there is a 'Refill Rx' section with 'RxNum' set to '1000035' and a 'Lookup' button. To the right, a 'New Rx' section is visible, containing fields for Doctor Name, Address, and Drug/Mix.

4. To add the Rx to the **Workorder Items** list, select **Add**.

The screenshot shows the same software interface as the previous one, but now with patient information filled in: Patient Search 'Blondel, Élina', DOB '17/07/1943', Age '81 years', Address '18-2545 Rue Beaudry', Gender 'Female', and RAMQ 'BLOE43571716'. The 'Due' field is set to 'in 19 mins' and 'Delivery' is set to 'Pickup'. The 'Refill #1000035 - 1 of 1' section is expanded, showing Doctor Name 'Dr. Dumais, Guy', Address, and Drug/Mix 'Apo Ramipril/Ramipril' with Strength '2.5mg', Form 'CAP', and OnHand '0'. The instruction 'TAKE 1 TABLET ONCE DAILY' is displayed. At the bottom, there are fields for Disp Qty (30), Rem Qty (30), Auth Qty (30), Days Supply (30), and Refill Due in (days). The 'Add' button is highlighted with a red box.

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**

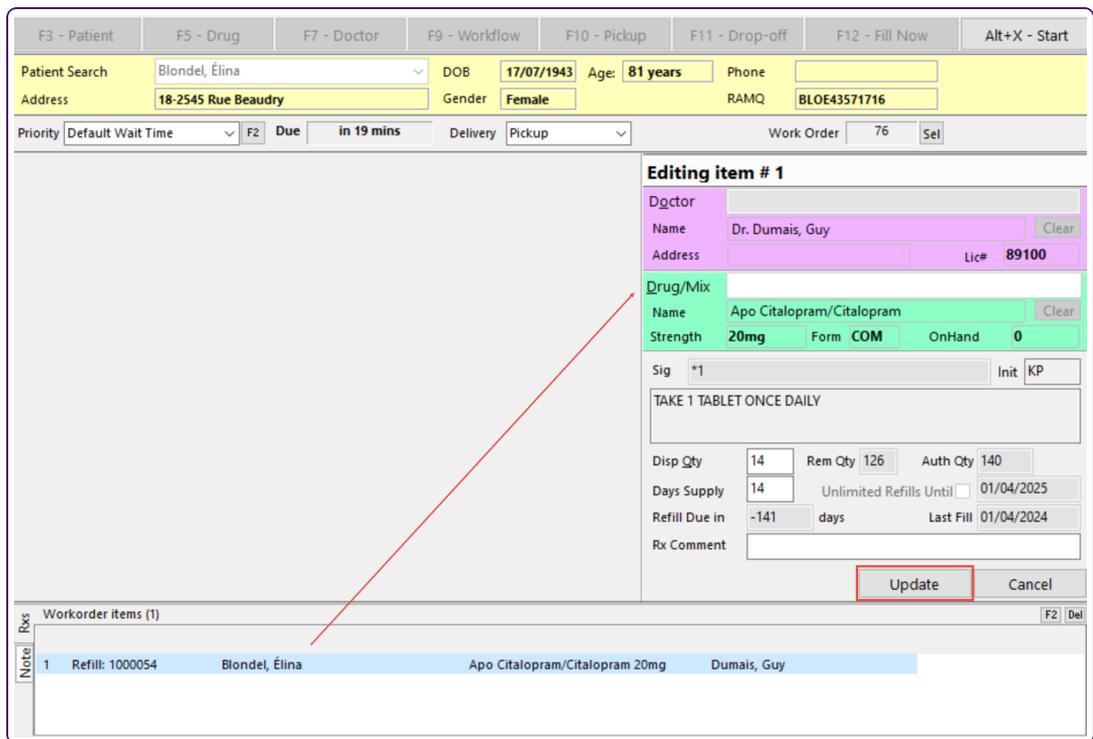
The patient's profile is displayed.

- 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 Rx's are displayed in the **Workorder Items** list on the **F11 - Drop-Off** window.

- 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**.



- 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.

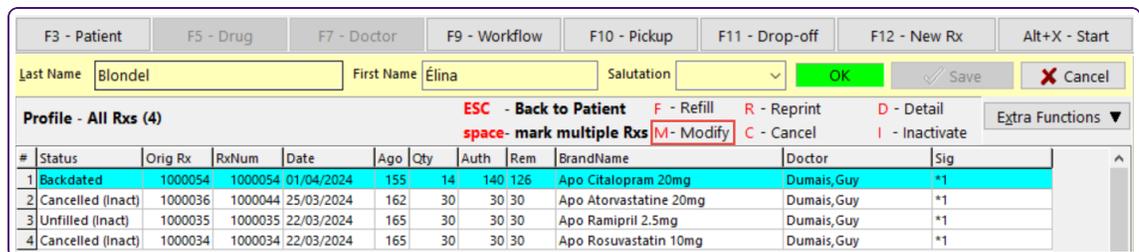
Chapter 19

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.



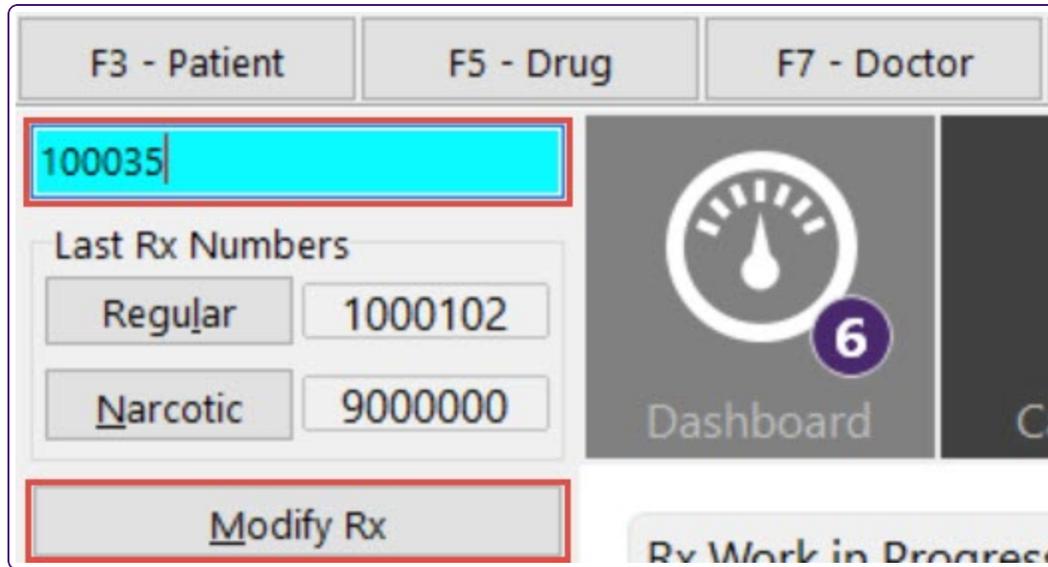
The screenshot shows the 'F3 - Patient' window for a patient named Elina Blondel. The window includes a header with navigation tabs (F3 - Patient, F5 - Drug, F7 - Doctor, F9 - Workflow, F10 - Pickup, F11 - Drop-off, F12 - New Rx, Alt+X - Start) and a search bar with fields for Last Name (Blondel) and First Name (Élina). Below the search bar are buttons for OK, Save, and Cancel. The main area displays 'Profile - All Rxs (4)' with a list of prescriptions. The 'M - Modify' option is highlighted in the navigation pane.

#	Status	Orig Rx	RxNum	Date	Ago	Qty	Auth	Rem	BrandName	Doctor	Sig
1	Backdated	1000054	1000054	01/04/2024	155	14	140	126	Apo Citalopram 20mg	Dumais, Guy	*1
2	Cancelled (Inact)	1000036	1000044	25/03/2024	162	30	30	30	Apo Atorvastatine 20mg	Dumais, Guy	*1
3	Unfilled (Inact)	1000035	1000035	22/03/2024	165	30	30	30	Apo Ramipril 2.5mg	Dumais, Guy	*1
4	Cancelled (Inact)	1000034	1000034	22/03/2024	165	30	30	30	Apo Rosuvastatin 10mg	Dumais, Guy	*1

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 screenshot shows the Alt-X Start window interface. At the top, there are three tabs: 'F3 - Patient', 'F5 - Drug', and 'F7 - Doctor'. Below the tabs, a search field contains the text '100035'. To the right of the search field is a dashboard area with a circular icon containing a drop and the number '6', and the text 'Dashboard'. Below the search field, there is a section titled 'Last Rx Numbers' with two rows: 'Regular' with the value '1000102' and 'Narcotic' with the value '9000000'. At the bottom of the search area, there is a button labeled 'Modify Rx'. The 'Rx Work in Progress' section is partially visible at the bottom right.

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.

The screenshot shows a pop-up window titled "Copy to New Number and Unfill Rxs" with a green header bar and a close button (X) in the top right corner. The window contains several input fields and buttons:

- Due Date:** A dropdown menu with a cyan highlight and a downward arrow, followed by an "F2" button and a "Due" label with an empty text box.
- Total Fills:** An empty text box.
- Unlimited Refills Until:** A checkbox followed by an empty text box.
- Doctor:** A text input field with "F2" and "Del" buttons to its right.
- Doc Location:** A dropdown menu with a downward arrow.
- Script Image:** A green plus sign icon in a square box.
- No Script Image Reason:** A large empty text area with upward and downward arrows on the right side.
- Buttons:** At the bottom, there is a green checkmark icon followed by the text "Apply" (highlighted with a blue border), and a red "X" icon followed by the text "Cancel".

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.

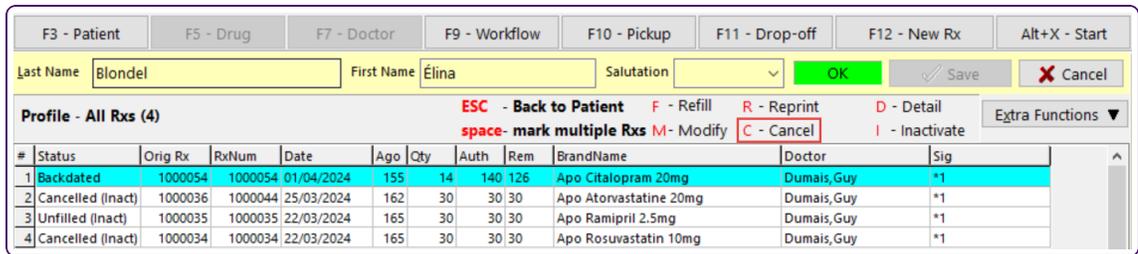
Chapter 21

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.



#	Status	Orig Rx	RxNum	Date	Ago	Qty	Auth	Rem	BrandName	Doctor	Sig
1	Backdated	1000054	1000054	01/04/2024	155	14	140	126	Apo Citalopram 20mg	Dumais, Guy	*1
2	Cancelled (Inact)	1000036	1000044	25/03/2024	162	30	30	30	Apo Atorvastatine 20mg	Dumais, Guy	*1
3	Unfilled (Inact)	1000035	1000035	22/03/2024	165	30	30	30	Apo Ramipril 2.5mg	Dumais, Guy	*1
4	Cancelled (Inact)	1000034	1000034	22/03/2024	165	30	30	30	Apo Rosuvastatin 10mg	Dumais, Guy	*1

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**.

The screenshot shows the Alt-X Start window interface. At the top, there are three tabs: 'F3 - Patient', 'F5 - Drug', and 'F7 - Doct'. Below the tabs, a search field contains the text '1000035'. To the right of the search field is a dashboard area with a circular icon and the number '6', and the text 'Dashboard'. Below the search field, there is a section titled 'Last Rx Numbers' with two rows: 'Regular' with '1000102' and 'Narcotic' with '9000000'. Below this section are three buttons: 'Modify Rx', 'Reprint Rx', and 'Cancel Rx'. The 'Cancel Rx' button is highlighted with a red border. To the right of the buttons, there is a section titled 'Rx Work in Pro' and another section titled 'Entrées de donn'.

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.

- Select **I - Inactivate** or press the I key.

F3 - Patient F5 - Drug F7 - Doctor F9 - Workflow F10 - Pickup F11 - Drop-off F12 - New Rx Alt+X - Start

Last Name: First Name: Salutation:

Profile - All Rxs (4) ESC - Back to Patient F - Refill R - Reprint D - Detail Extra Functions ▼
 space- mark multiple Rxs M - Modify C - Cancel **I - Inactivate**

#	Status	Orig Rx	RxNum	Date	Ago	Qty	Auth	Rem	BrandName	Doctor	Sig
1	Backdated	1000054	1000054	01/04/2024	155	14	140	126	Apo Citalopram 20mg	Dumais, Guy	*1
2	Cancelled (Inact)	1000036	1000044	25/03/2024	162	30	30	30	Apo Atorvastatine 20mg	Dumais, Guy	*1
3	Unfilled (Inact)	1000035	1000035	22/03/2024	165	30	30	30	Apo Ramipril 2.5mg	Dumais, Guy	*1
4	Cancelled (Inact)	1000034	1000034	22/03/2024	165	30	30	30	Apo Rosuvastatin 10mg	Dumais, Guy	*1

Inactivate Rx(s) — □ ×

Rx Summary

Rx Num	Orig Rx Num	Drug	Doctor	Status
1000109	1000109	Balminil Decongest 0.1%	Dr. Attaran, Nasim	This Rx is not completed.

You are prompted to enter an optional reason for inactivating the Rx.

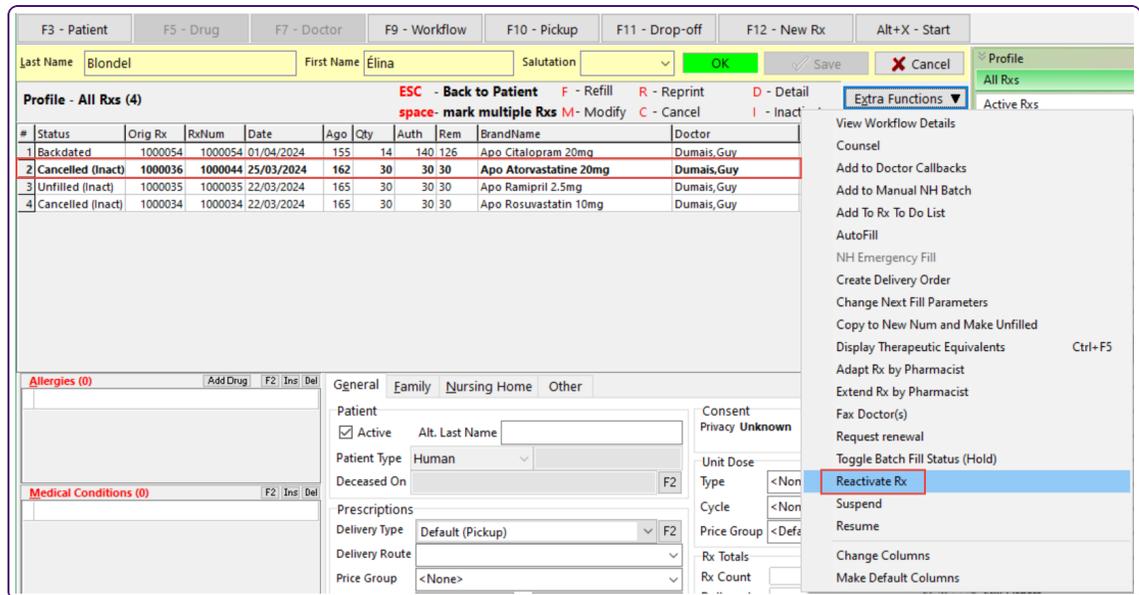
- Select **OK** to continue.

The status of the prescription in the patient profile is set to 'Inact'.

Chapter 23

Reactivate Rx

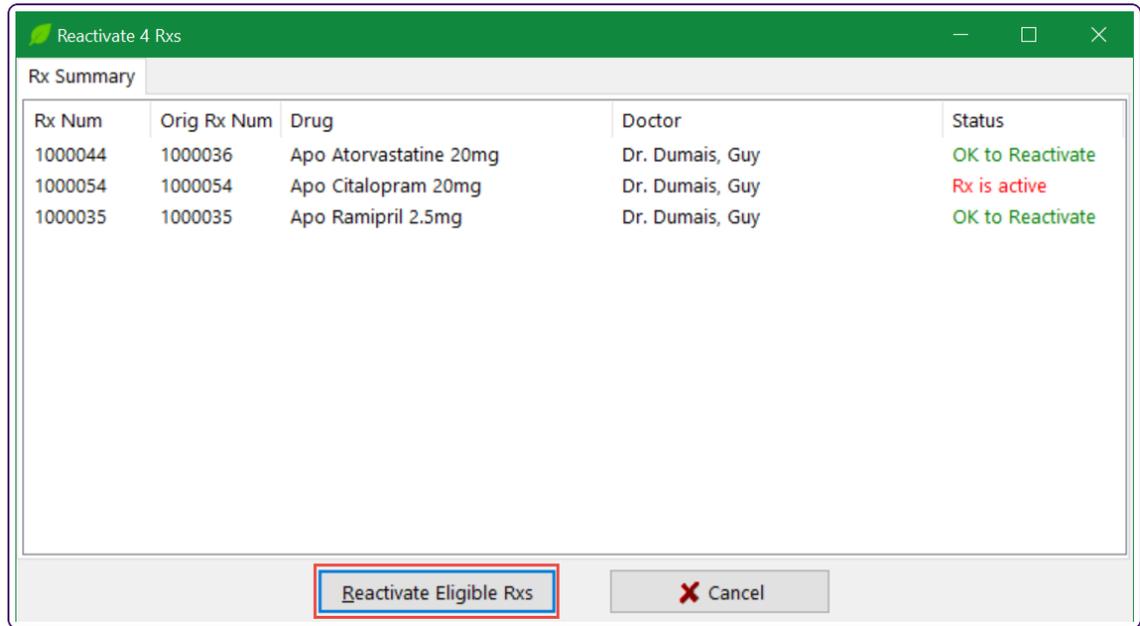
1. From the **Alt-X Start** window, select **F3 - Patient**, then search for and select the patient. The patient profile is displayed.
2. Select **All Rxs** from the right navigation pane.
3. Use the space bar on your keyboard to tag the Rx(s) you want to modify.
4. Select **Extra Functions > Reactivate Rx**.



The screenshot shows the patient profile window for a patient named Elina Blondel. The 'All Rxs' table is visible, listing four prescriptions. The second prescription, 'Apo Atorvastatine 20mg', is highlighted in red. The 'Extra Functions' menu is open, and 'Reactivate Rx' is highlighted in blue.

#	Status	Orig Rx	RxNum	Date	Ago	Qty	Auth	Rem	BrandName	Doctor
1	Backdated	1000054	1000054	01/04/2024	155	14	140	126	Apo Citalopram 20mg	Dumais,Guy
2	Cancelled (inact)	1000036	1000044	25/03/2024	162	30	30	30	Apo Atorvastatine 20mg	Dumais,Guy
3	Unfilled (inact)	1000035	1000035	22/03/2024	165	30	30	30	Apo Ramipril 2.5mg	Dumais,Guy
4	Cancelled (inact)	1000034	1000034	22/03/2024	165	30	30	30	Apo Rosuvastatin 10mg	Dumais,Guy

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.

Enter >

6. Select **Add** to add the work order to the **Workorder items** list.

The screenshot displays a software interface for a pharmacy. At the top, there are function keys: F3 - Patient, F5 - Drug, F7 - Doctor, F9 - Workflow, F10 - Pickup, F11 - Drop-off, F12 - Fill Now, and Alt+X - Start. Below these, patient information is shown: Patient Search (Blondel, Élina), DOB (17/07/1943), Age (81 years), Address (18-2545 Rue Beaudry), Gender (Female), and RAMQ (BLOE43571716). A 'Priority' dropdown is set to 'Default Wait Time' and 'Due' is 'in 19 mins'. The 'Delivery' dropdown is set to 'Pickup'. A 'Work Order' field contains '79'. The main area is split into two panes. The left pane shows a prescription receipt from 'THE FIRST PHARMACY' dated March 1, 2014, with fields for 'YOUR NAME', 'Your Address', and 'Your City, Province'. The right pane is titled 'New Not Disp' and contains fields for 'Doctor' (Ph. Aba, Ines), 'Drug/Mix' (Caffeine Citrate Oral Solution USP/Caffeine Citra), 'Strength' (20mg/mL), 'Form' (ML), and 'OnHand' (0). It also has fields for 'Sig', 'Disp Qty', '+ Refills', '= Auth Qty', 'Days Supply', 'Unlimited Refills Until', 'Rx Status' (Not Disp), and 'Written Date'. At the bottom right, there are 'Add' and 'Cancel' buttons.

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.

Enter >

4. Select **Add** to add the work order to the **Workorder items** list.

The screenshot shows a software interface with a top navigation bar containing tabs: F3 - Patient, F5 - Drug, F7 - Doctor, F9 - Workflow, F10 - Pickup, F11 - Drop-off, F12 - Fill Now, and Alt+X - Start. Below the navigation bar, there are fields for Patient Search (Blondel, Élina), Address (18-2545 Rue Beaudry), DOB (17/07/1943), Age (81 years), Gender (Female), and RAMQ (BLOE43571716). A 'Priority' dropdown is set to 'Default Wait Time' and 'Due' is 'in 19 mins'. The 'Delivery' dropdown is set to 'Pickup' and 'Work Order' is '79'. A central window displays a prescription receipt from 'THE FIRST PHARMACY' dated March 1, 2014. To the right, a 'New Not Disp' form is open, showing fields for Doctor Name (Ph. Aba, Ines), Drug/Mix Name (Caffeine Citrate Oral Solution USP/Caffeine Citra), Strength (20mg/mL), Form (ML), and OnHand (0). The 'Rx Status' dropdown is set to 'Fill'. At the bottom right of the form, there is an 'Add' button highlighted with a red box.

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.

- 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.

Rx Plan Information

1 - RCMP

Intervention Code 1 PS - Professional care service. F2

Intervention Code 2 F2

Special Authorization # Adj Date

Special Service Code SSC Fee 0.00

Reason Code F2 Reason Code Ref

Claim Type Regular Claim Real Time Plan

Pseudo DIN

OK Cancel

- Enter any remaining Rx information.
- 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.

Transfer Rx from other store

Search for a store. Type its name, address, or other information

pharm

Store Name	Address	City	Pr...	Phone	Fax
Pharmacy 1	123 Any St	Toronto	ON	(111) 111-1111	(222) 222-2222

Chain

Address

City Prov

Postal

Phone

Fax

Comments

Store is closed down

Rx information from other store

First fill date

Last fill date

Rx #

Total original fills

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 screenshot shows a software interface for a patient profile. At the top, there are navigation tabs: F3 - Patient, F5 - Drug, F7 - Doctor, F9 - Workflow, F10 - Pickup, F11 - Drop-off, F12 - New Rx, and Alt+X - Start. Below these, the patient's name is 'Blondel' and 'Élina', with a salutation dropdown and buttons for OK, Save, and Cancel. A 'Profile' button is also visible.

The main section is titled 'Profile - All Rxs (4)'. It contains a table of prescriptions:

#	Status	Orig Rx	RxNum	Date	Ago	Qty	Auth	Rem	BrandName	Doctor
1	Backdated	1000054	1000054	01/04/2024	156	14	140	126	Apo Citalopram 20mg	Dumais, Guy
2	Cancelled (inact)	1000036	1000044	25/03/2024	163	30	30	30	Apo Atorvastatine 20mg	Dumais, Guy
3	Unfilled (inact)	1000035	1000035	22/03/2024	166	30	30	30	Apo Ramipril 2.5mg	Dumais, Guy
4	Cancelled (inact)	1000034	1000034	22/03/2024	166	30	30	30	Apo Rosuvastatin 10mg	Dumais, Guy

Below the table are sections for 'Allergies (0)', 'Medical Conditions (0)', and 'Groups (1)'. To the right of these sections are tabs for 'General', 'Family', 'Nursing Home', and 'Other'. The 'General' tab is active, showing fields for Patient (Active checkbox, Alt. Last Name), Patient Type (Human), Deceased On, Prescriptions (Delivery Type: Default (Pickup), Delivery Route, Price Group: <None>), and Drug line 1 (Default (Brand), 2 Default (Generic)).

On the far right, a dropdown menu 'Extra Functions' is open, listing various actions. The option 'Transfer Rx to Another Store' is highlighted in blue.

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

- 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.

Transfer Out Rx(s)

Search for a store. Type its name, address, or other information

pharm New

Store Name	Address	City	Pr...	Phone	Fax
Pharmacy 1	123 Any St	Toronto	ON	(111) 111-1111	(222) 222-2222

Chain

Address

City Prov

Postal

Phone

Fax Edit

Comments

Rx Summary

Px Num	Orig Px Num	Drug	Doctor	Status
1000026	1000026	Lidomyxin	Dr. Test Doc	Not completed

A store must be specified

Transfer Out Eligible Rxs **X** Cancel

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.

- 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.

The screenshot shows a dialog box titled "Transfer Patient Profiles Form". It has a green header bar with a close button (X). The form is divided into two main sections. The top section, "New Patient to be transferred TO", is highlighted with a red border and contains a search field, a name field with "Blondel, Élina", an address field with "18-2545 Rue Beaudry", an address 2 field, a city field with "Sherbrooke", and a province field with "Qc". The bottom section, "Old Patient to be transferred FROM", has a search field highlighted in cyan and empty name, address, and city fields. At the bottom are "Lookup" and "Cancel" buttons.

- 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.

- Select **Transfer**.

A prompt appears, asking if you are sure you want to merge the two patients.

- Select **Yes**.

- Select **Cancel** to close the **Transfer Patient Profiles Form**.

Drug merges

- From the **Alt-X Start** window, select **Utilities > Merge > Drugs**.

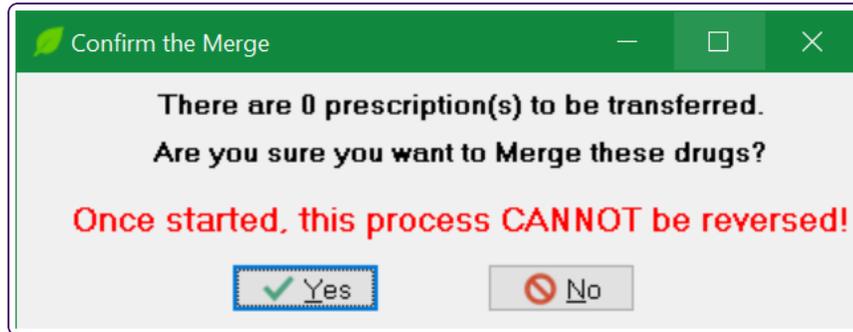
The **Merge Drugs** form is displayed.

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**.

The screenshot shows the 'Merge Drugs Form' window. It has a green title bar with a leaf icon and a close button. The form is divided into two sections. The top section is labeled 'New Drug to be merged TO' and contains input fields for 'Brand', 'Generic', 'Manuf.', and 'Form' (with a 'DIN' field next to it). The text 'oxy*' is entered in the main input field and is highlighted with a red box. The bottom section is labeled 'Old Drug to be merged FROM' and contains similar input fields. The text 'oxy*' is also entered in this field and highlighted with a red box. At the bottom of the form, there are two buttons: 'Lookup' with a green checkmark icon and 'Cancel' with a red X icon. The 'Lookup' button is highlighted with a red box.

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.

- 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.

Merge Doctors Form

New Doctor to be merged TO

Name: Dr. Attar, Dana

Address 1: Centre Universitaire De Santé Mcgill (Cu)

Address 2:

City: Montréal Prov: QC

Old Doctor to be merged FROM

Name:

Address 1:

Address 2:

City: Prov:

Lookup Cancel

- 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.

- Select **Transfer**.

A prompt appears, asking if you are sure you want to merge the two prescribers.

- Select **Yes**.

- Select **Cancel** to close the **Merge Doctors** Form.

Chapter 28

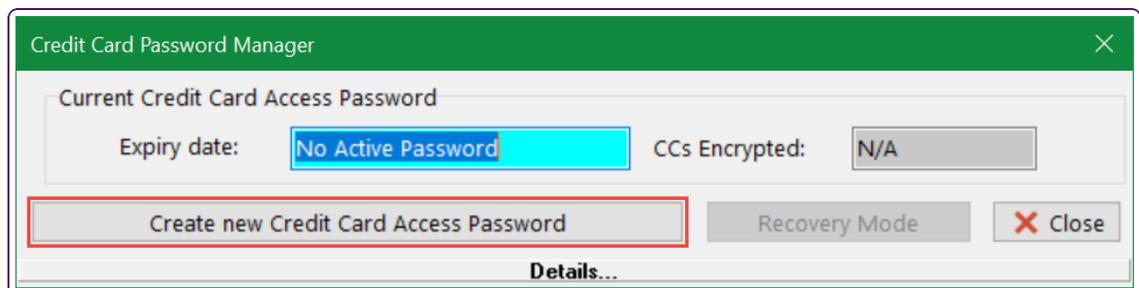
Patient credit cards

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 screenshot shows a window titled "Credit Card Password Manager" with a green header bar. Below the header, there is a section for "Current Credit Card Access Password". Under this section, "Expiry date:" is set to "No Active Password" (highlighted in cyan) and "CCs Encrypted:" is set to "N/A". At the bottom of the window, there are three buttons: "Create new Credit Card Access Password" (highlighted with a red border), "Recovery Mode", and "Close" (with a red X icon). A "Details..." link is also visible at the bottom center.

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.

Credit Cards			
Items (0)			
Debit Type	Card Type	Account Number	Expiry

The **Patient Credit Card** Information form appears with the patient's address information filled in.

3. Select a **Card Type**.

Select an Option

Please select a card type

Credit Card

EFT

Cancel

4. If you selected **Credit Card**:

- Select the **Card Type** and enter the **Card Number**, **Expiry Date**, and **Cardholder Name**.

Patient Credit Card Information

Debit Type: Credit card

Card Type: [Dropdown]

Card Number: [Text Box]

Expiry Date: [Text Box]

Cardholder Name: [Text Box]

Address Link: Default

Address 1: 18-2545 Rue Beaudry

Address 2: [Text Box]

City, Prov: Sherbrooke Qc

Postal, Country: J1J 1K9 Canada

Save Cancel

- Select **Save**.

5. If you selected **EFT**:

- Enter the **Bank Number**, **Transit Number**, and **Account Number**.

The screenshot shows a dialog box titled "Patient Credit Card Information". At the top, there is a "Debit Type" dropdown menu with "EFT" selected. Below this, there are three input fields: "Bank Number", "Transit Number", and "Account Number". A red rectangular box highlights these three fields. At the bottom of the dialog, there are two buttons: "Save" (with a green checkmark icon) and "Cancel" (with a red X icon). The "Save" button is also highlighted with a red rectangular box.

- Select **Save**.

6. Enter the credit card password in the **Password** field and select **OK**.

The screenshot shows a dialog box titled "Enter Password". It contains the text "Please enter the credit card access password" above a "Password:" input field. At the bottom, there are two buttons: "OK" (with a green checkmark icon) and "Cancel" (with a red X icon). The "OK" button is highlighted with a blue rectangular box.

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				Totals For 10-Sep-2014			
New Rxs	0	Acq	0.00	New Rxs	0	Acq	0.00
Repeat Rxs	0	Eff. Mkup	0.00	Repeat Rxs	0	Eff. Mkup	0.00
Total Rxs	0	Eff.Mkup%	0.00	Total Rxs	0	Eff.Mkup%	0.00
Printed On:		Fee	0.00	Printed On:		Fee	0.00
10/09/2014 09:21:50		Total	0.00	10/09/2014 09:21:50		Total	0.00
		G.P. %	0.00			G.P. %	0.00
 Totals For 10-Sep-2014				 Totals For 10-Sep-2014			
New Rxs	0	Acq	0.00	New Rxs	0	Acq	0.00
Repeat Rxs	0	Eff. Mkup	0.00	Repeat Rxs	0	Eff. Mkup	0.00
Total Rxs	0	Eff.Mkup%	0.00	Total Rxs	0	Eff.Mkup%	0.00
Printed On:		Fee	0.00	Printed On:		Fee	0.00
10/09/2014 09:21:50		Total	0.00	10/09/2014 09:21:50		Total	0.00
		G.P. %	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								
Code	Plan Name	Claims Amount	Claims #	Same Day Reversals Amount	Same Day Reversals #	Prior Day Reversals Amount	Prior Day Reversals #	Net Amount
AHE	Assure Health (SHNS)	Failed to get totals: Could not connect to IP Address: Port:6180 Error: WinSockError: 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.

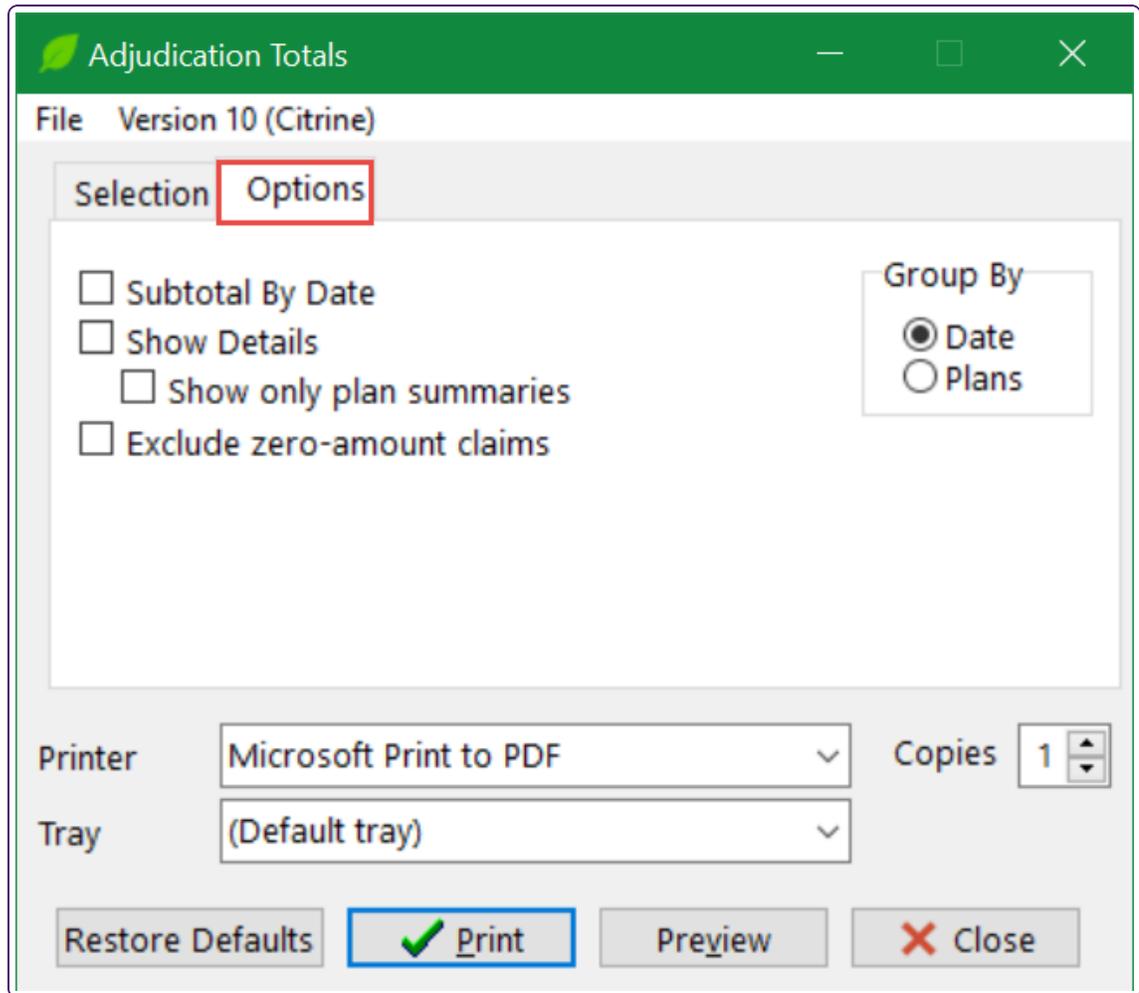
1. From the menu, select **Reports > Rx > Adjudication Totals**.
The **Adjudication Totals** report form is displayed.
2. On the **Selection** tab, use the **Date Range**, **Starting**, and **Ending** fields to specify a date range.

The screenshot shows the 'Adjudication Totals' report form. The 'Selection' tab is highlighted with a red box. The form includes the following elements:

- File Version 10 (Citrine)** menu bar.
- Selection** and **Options** tabs.
- Adjudication date** (selected) and **Transaction date** radio buttons.
- Date Range** dropdown menu set to **This Month** (highlighted in cyan).
- Starting** date field: 01/09/2024
- Ending** date field: 04/09/2024
- Plans** field: (All)
- Exclude** checkbox (unchecked)
- F2** button next to the Plans field.
- Printer** dropdown: Microsoft Print to PDF
- Copies** spinner: 1
- Tray** dropdown: (Default tray)
- Restore Defaults**, **Print** (highlighted with a blue box), **Preview**, and **Close** buttons.

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							
Adjudication Totals Report							
Adjudication Date - 10-Sept-2014 to 10-Sept-2014							
Printed on: 10/09/2014 12:06:38							
Manual Billed Claims Summary							
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.

The screenshot shows a dialog box titled "Plan Summary" with a green header bar. Below the header is a menu bar with "File" and "Version 10 (Citrine)". The dialog is divided into two tabs: "Selection" and "Options". Under the "Selection" tab, there is a "Date Range" dropdown menu set to "This Month", and two date input fields labeled "Starting" (01/09/2024) and "Ending" (04/09/2024). Below these are three radio buttons: "Patient", "Home", and "All", with "All" selected. A "Patient Groups" text box contains "(All)", with an "F2" button to its right. There are checkboxes for "Exclude" and "Advanced". At the bottom, there are fields for "Printer" (Microsoft Print to PDF) and "Tray" ((Default tray)), along with a "Copies" spinner set to 1. A row of buttons at the very bottom includes "Restore Defaults", "Print" (with a green checkmark), "Preview", "Save CSV", and "Close" (with a red X).

5. Select **Preview** to preview the report or **Print** to generate a printout of the report.

Plan Summary ReportKroll Pharmacy, 220 Duncan Mill Road, Toronto ON
(416) 383-1010 Fax: (416) 383-0001Report Parameters
Fill Date - 15/01/2014 to 30/01/2014
Group Rxs by First Paying Plan

Printed on: 25/09/2014 13:41:13

Plan Summary Report

Code	Plan Name	A.A.C.	Effective 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	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 (RoPlus)	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
Reversed Totals		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.

- Use the **Date Range**, **Starting**, and **Ending** fields to specify a date range.

The screenshot shows the 'Claims Invoice' application window with the 'Selection' tab active. The interface includes the following elements:

- Date Range:** A dropdown menu set to 'This Month', with 'Starting' and 'Ending' date fields set to '01/09/2024' and '04/09/2024' respectively.
- Filters:** Radio buttons for 'Patient', 'Home', and 'All' (selected).
- Patient Groups:** A text field containing '(All)' and an 'F2' button, with an 'Exclude' checkbox.
- Plans:** A text field containing '(All)' and an 'F2' button, with an 'Exclude' checkbox.
- Specific Rxs:** A text field and a 'Clear' button.
- Printer/Tray:** A dropdown menu for the printer (set to 'Microsoft Print to PDF') and a 'Copies' spinner set to '1', along with a 'Tray' dropdown (set to '(Default tray)').
- Buttons:** 'Restore Defaults', 'Print' (with a green checkmark), 'Preview', 'Save CSV', and 'Close' (with a red X).

- To select the patient groups you want included in the report, select the **F2** button next to the **Patient Groups** field.
- 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.
- 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.

- Select the **Options** tab to specify the report parameters.

The screenshot shows the 'Claims Invoice' application window. The title bar reads 'Claims Invoice'. Below the title bar is a menu bar with 'File' and 'Version 10 (Citrine)'. The main area has two tabs: 'Selection' and 'Options', with 'Options' being the active tab. The 'Options' tab contains the following elements:

- A list of checkboxes for print options:
 - Print store logo
 - Print cost, fee & markup
 - Print total
 - Print prev paid / 3rd party pays
 - Print co-pay
 - Print AAC
 - Print mixture breakdown
 - Populate signature date field
 - Show 3rd party paid instead of prev paid
 - Show client ID instead of rel
 - Show subplans instead of plans
 - Include same-range cancels
 - Include items where plan pays \$0.00
 - Include data for real-time plans
 - Include admin fee \$
 - Print DOS-style (condensed) report
 - Generate detail plan summary only
 - Exclude summary pages
- 'Orientation' section:
 - Portrait
 - Landscape
- 'Current Invoice #' field:
- 'Group by' section:
 - None
 - Sort by patient
 - Patient
 - Group ID
- 'Fee For Service:' dropdown menu:
- Printer selection:
- Tray selection:
- Copies:
- Buttons: 'Restore Defaults', 'Print' (with a green checkmark icon), 'Preview', 'Save CSV', and 'Close' (with a red X icon).

- 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	Birthdate	Qty	Drug	AAC	Cost	Markup	Fee	Total	3rd Prty	Net
1154126	Kroll, Tony Smith, A.J.M.	19-Jan-1967	30	TAB Apo-Simvastatin 40mg	18.75	21.75	0.00	10.99	32.74	32.74	32.74
			Client ID	Billing #					DIN	Co-pay SA #	Fill Date
			123456	123456					02247014	0.00	26-Sep-2014 APX
Totals					18.75	21.75	0.00	10.99	32.74	32.74	32.74
										0.00	

The second page of the printed report shows the total number of Rx's 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 Rx's				Reversed Rx's				Net Rx's			
# of Rx's:	1	# of Rx's:	0	# of Rx's:	1	AAC:	18.75	AAC:	0.00	Cost:	21.75
AAC:	18.75	AAC:	0.00	Cost:	21.75	Markup:	0.00	Markup:	0.00	Fee:	10.99
Cost:	21.75	Cost:	0.00	Fee:	10.99	Total:	32.74	Total:	0.00	3rd Prty:	32.74
Markup:	0.00	Markup:	0.00	Total:	32.74	Co-pay:	0.00	Co-pay:	0.00	Net:	32.74
Fees:	10.99	Fees:	0.00	3rd Prty:	0.00	Net:	32.74	Net:	0.00		
Total:	32.74	Totals:	0.00	Co-pay:	0.00						
3rd Prty:	32.74	Net:	0.00	Net:	0.00						
Co-pay:	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.

September 26, 2014
Date

Pharmacist's Signature _____

The last page is the **Report Summary**. This page is typically kept by the pharmacy to track what they have submitted.

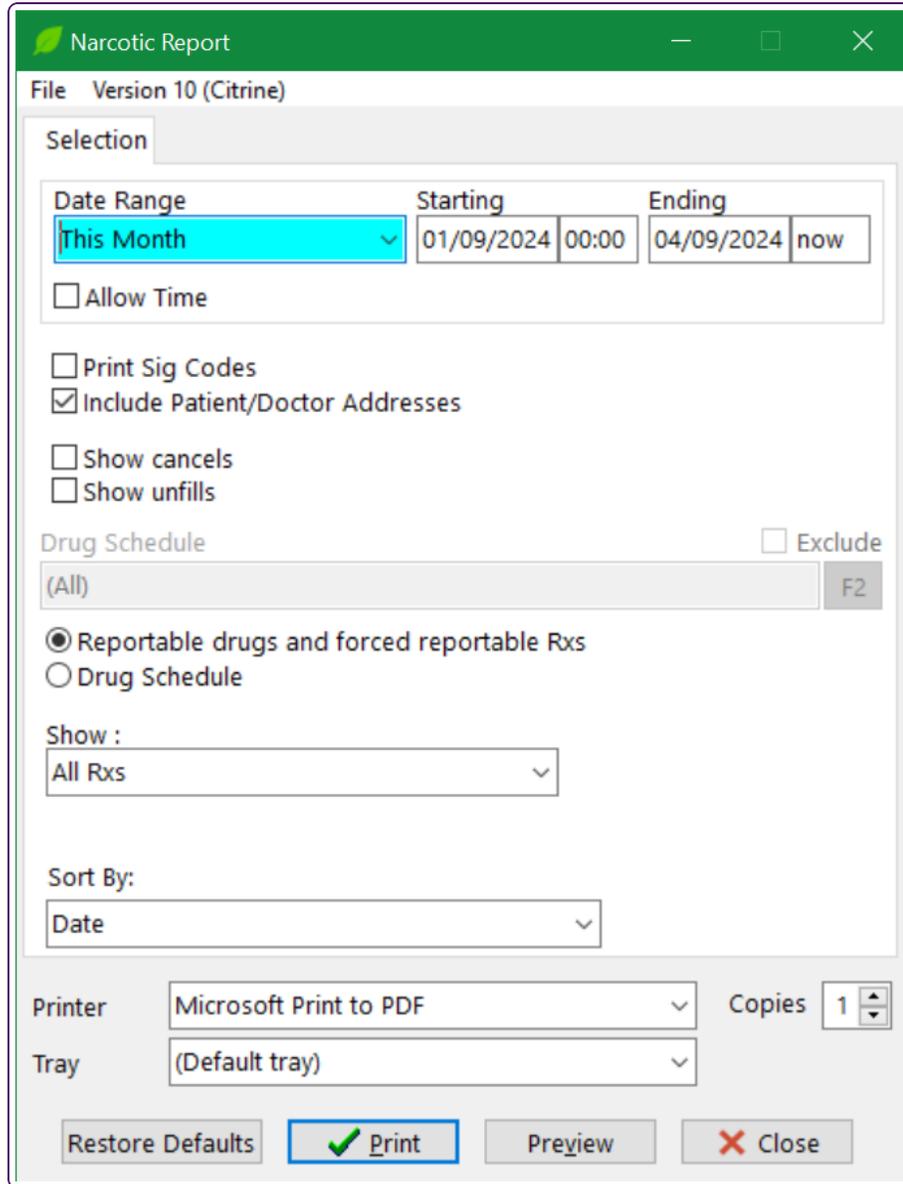
Claim Invoice Report											
Kroll Pharmacy, 220 Duncan Mill Road, Toronto ON (416) 383-1010 Fax: (416) 383-0001											
ReportParameters Adjudication Date - 26/09/2014 to 26/09/2014 Showing subplans rather than plans Plans - Manual Plan											
Claim Invoice Report										Printed on: 26/09/2014 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		
TotalForwards	18.75	21.75	0.00	10.99	32.74	32.74	0.00	32.74	1		
TotalReversals	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0		
TotalNet	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.



The screenshot shows the 'Narcotic Report' window with a green title bar. The window title is 'Narcotic Report' and the version is 'Version 10 (Citrine)'. The interface includes a 'Selection' section with a 'Date Range' dropdown set to 'This Month', 'Starting' date '01/09/2024 00:00', and 'Ending' date '04/09/2024 now'. There are checkboxes for 'Allow Time', 'Print Sig Codes', 'Include Patient/Doctor Addresses', 'Show cancels', and 'Show unfills'. The 'Drug Schedule' section has an 'Exclude' checkbox and a dropdown set to '(All)' with an 'F2' button. Radio buttons are present for 'Reportable drugs and forced reportable Rxs' (selected) and 'Drug Schedule'. There are also dropdowns for 'Show :' (set to 'All Rxs') and 'Sort By:' (set to 'Date'). At the bottom, there are fields for 'Printer' (Microsoft Print to PDF) and 'Copies' (1), and a 'Tray' dropdown (Default tray). Action buttons include 'Restore Defaults', 'print' (with a green checkmark), 'Preview', and 'Close' (with a red X).

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 reportableRxs								
Sort by Date								
NarcoticReport							Printed on: 26/09/2014 13:39:38	
Fill Date	Status	Sig	Tx Init	W/O	Qty	Drug DIN/ReportableComponent	Patient Address	Doctor Address
Part Fill	Orig. Rx							
26-Sep-14	Filled	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	9010591	DL		1	AER Methadone Test 3 0.010 GM Methadone Pd	Test, John ON	Dr. Smith, A.J.M. Bgh Belleville ON
Part Fill of Rx#: 9010591								
26-Sep-14	Filled	9010592	DL	W	30	TAB Dilaudid 2mg 00125083	Test, John ON	Dr. Smith, A.J.M. Bgh Belleville ON
26-Sep-14	Filled	9010593	DL	W	1	ML Metadol-D 10mg 02244290	Test, John ON	Dr. Smith, A.J.M. Bgh Belleville ON
26-Sep-14	Filled	9010594	DL	W	100	TAB Oxycontin 10mg 02202441	Test, John ON	Dr. Smith, A.J.M. Bgh Belleville ON
26-Sep-14	Filled	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 Rx's 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.

The screenshot shows the 'Options' dialog box for the Profit/Loss report. The dialog is titled 'Profit/Loss' and has a menu bar with 'File' and 'Version 10 (Citrine)'. The 'Options' tab is selected. The dialog contains the following elements:

- Selection:** A tab labeled 'Options' is highlighted.
- Checkboxes:**
 - Print same day cancels
 - Exclude cancelled Rx's
 - Show discount
 - Show Initials
 - Include fee in Rx Total calculation
 - Summary only
 - Print Rx's where Profit Amount > than 0
 - Print Rx's where Total > than 0
 - Print only Rx's with manual price
- Orientation:**
 - Portrait
 - Landscape
- Fee For Service:**
 - Include fee for service Rx's
- Sort:**
 - Not specified. (F2)
- Printer:** Microsoft Print to PDF
- Copies:** 1
- Tray:** (Default tray)
- Buttons:** Restore Defaults, Print (highlighted with a green checkmark), Preview, Save CSV, Close.

5. Select the following checkboxes, as applicable:
- **Print same day cancels:** includes Rx's that were cancelled the same day they were filled.
 - **Exclude cancelled Rx's:** excludes cancelled Rx's 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 Rx's 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 Rx's where Total > than 0:** includes Rx's where the total is >, <, >=, <= the specified dollar amount.
 - **Print only Rx's 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.

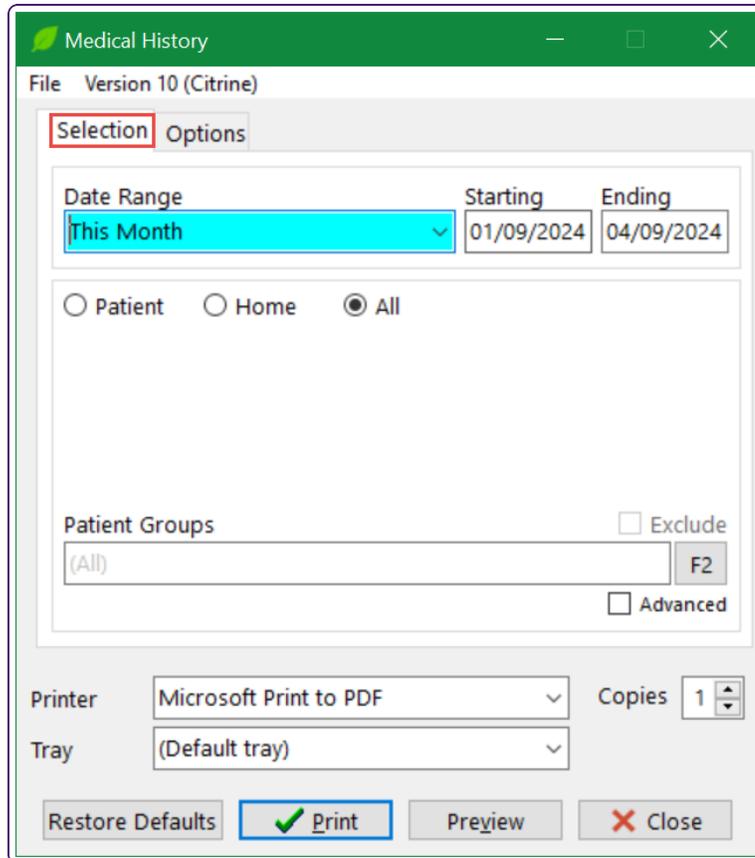
Profit/Loss Report											
Kroll Pharmacy, 220 Duncan Mill Road, Toronto ON (416) 383-1010 Fax: (416) 383-0001											
ReportParameters											
Fill/Cancel Date - 26/09/2014 to 26/09/2014											
Print where profit amount > 0.00											
Print where Rx Total > 0.00											
Printed on: 26/09/2014 13:46:38											
Profit/LossReport											
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	Methodone Test 3	1	16.83	0.00	14.51	2.32	13.78	
26-Sep-2014	9010591	DL	ONNMS/Cash	Methodone 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.

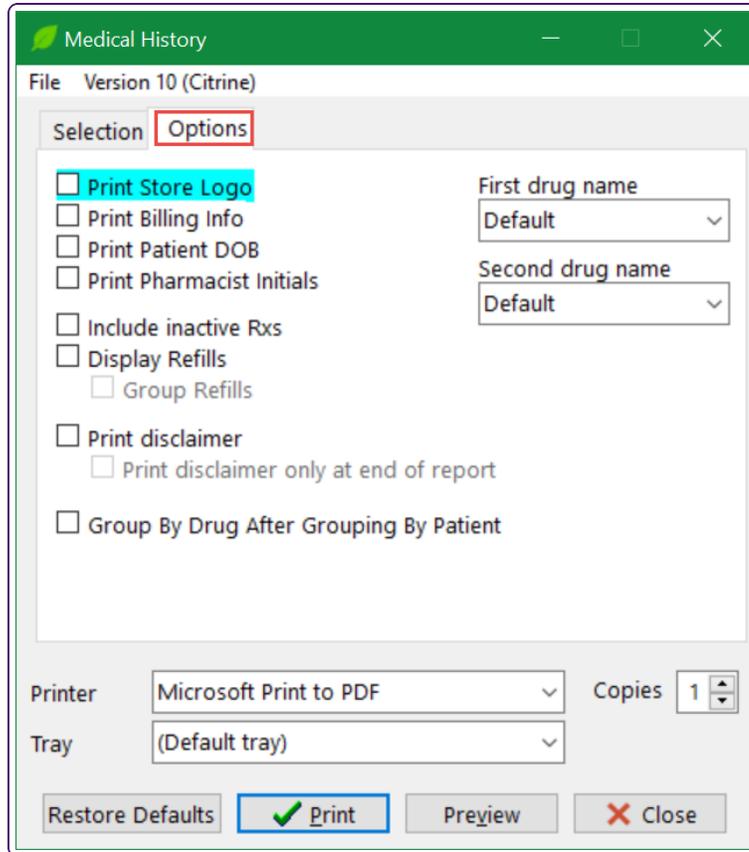
1. From the menu, select **Reports > Patient > Patient Medical History**.
The **Patient Medical History** report form is displayed.



The screenshot shows a software window titled "Medical History" with a green header bar. Below the header is a menu bar with "File" and "Version 10 (Citrine)". The main area has two tabs: "Selection" (highlighted with a red box) and "Options". Under "Selection", there are three fields: "Date Range" (a dropdown menu with "This Month" selected and highlighted in cyan), "Starting" (a date field with "01/09/2024"), and "Ending" (a date field with "04/09/2024"). Below these are three radio buttons: "Patient", "Home", and "All" (which is selected). Further down is a "Patient Groups" section with a text box containing "(All)", an "Exclude" checkbox, and an "F2" button. At the bottom right of this section is an "Advanced" checkbox. The bottom of the window contains printer settings: "Printer" (Microsoft Print to PDF), "Copies" (1), and "Tray" (Default tray). At the very bottom are four buttons: "Restore Defaults", "Print" (with a green checkmark icon), "Preview", and "Close" (with a red X icon).

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	Tx	Disp. Qty	Rem. Qty	Drug Name	DIN	Doctor	First Fill	Fill Date Status
Sig Code								
<u>Ensure Fibre Choc 235ml</u>								
1000106	1000106	30	0	ML Ensure Fibre Chocolate	00000000	Dr. Hanet, Stephen	17-Apr-2014	17-Apr-2014
							TAKE 2 TEASPOONSFUL (10MLS)	Adjudicating
<u>Ensure Hi Protein Vanilla</u>								
1000107	1000107	120	0	ML Ensure Hi Protein Vanilla	00801054	Dr. Hanet, Stephen	17-Apr-2014	17-Apr-2014
							2SP	Adjudicating
<u>Simvastatin</u>								
1000128	1000128	10	0	TAB Apo-Simvastatin 20mg	02247013	Dr. Test, Doctor	01-Oct-2014	01-Oct-2014
							AS DIRECTED	Pending Adj

THIS TELECOPY IS **CONFIDENTIAL** AND IS INTENDED TO BE RECEIVED BY THE ADDRESSEE ONLY. IF THE READER IS NOT THE INTENDED RECIPIENT THEREOF, YOU ARE ADVISED THAT ANY DISSEMINATION, DISTRIBUTION OR COPYING OF THIS FACSIMILE IS **STRICTLY PROHIBITED.**

Rx for Drug/Doctor Group Report

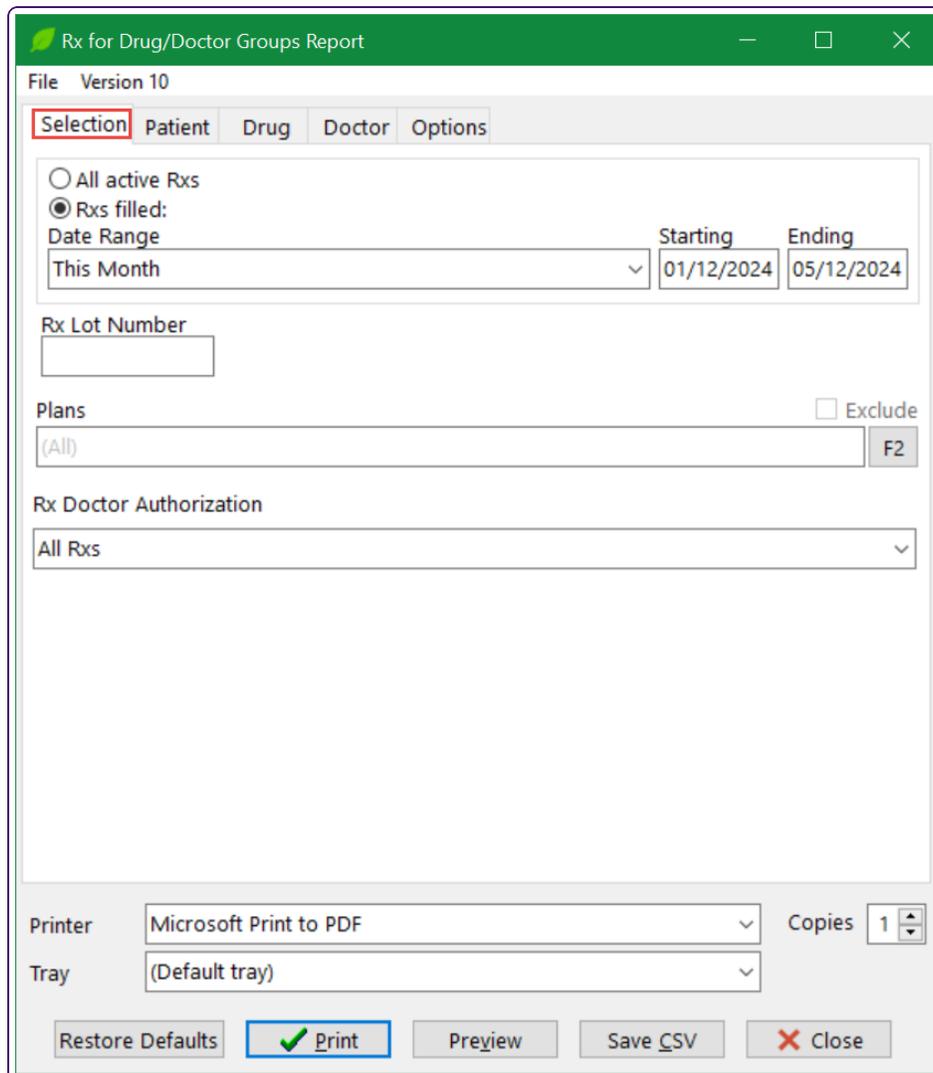
The **Rx for Drug/Doctor Groups** report is used to find a particular dispense for a specific drug, doctor, drug group, or doctor group. This report is especially useful for drug recalls.

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 Rx's** to generate the report for all currently active Rx's, or **Rx's 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.



Rx for Drug/Doctor Groups Report

File Version 10

Selection Patient Drug Doctor Options

All active Rx's

Rx's filled:

Date Range: This Month Starting: 01/12/2024 Ending: 05/12/2024

Rx Lot Number

Plans: (All) Exclude F2

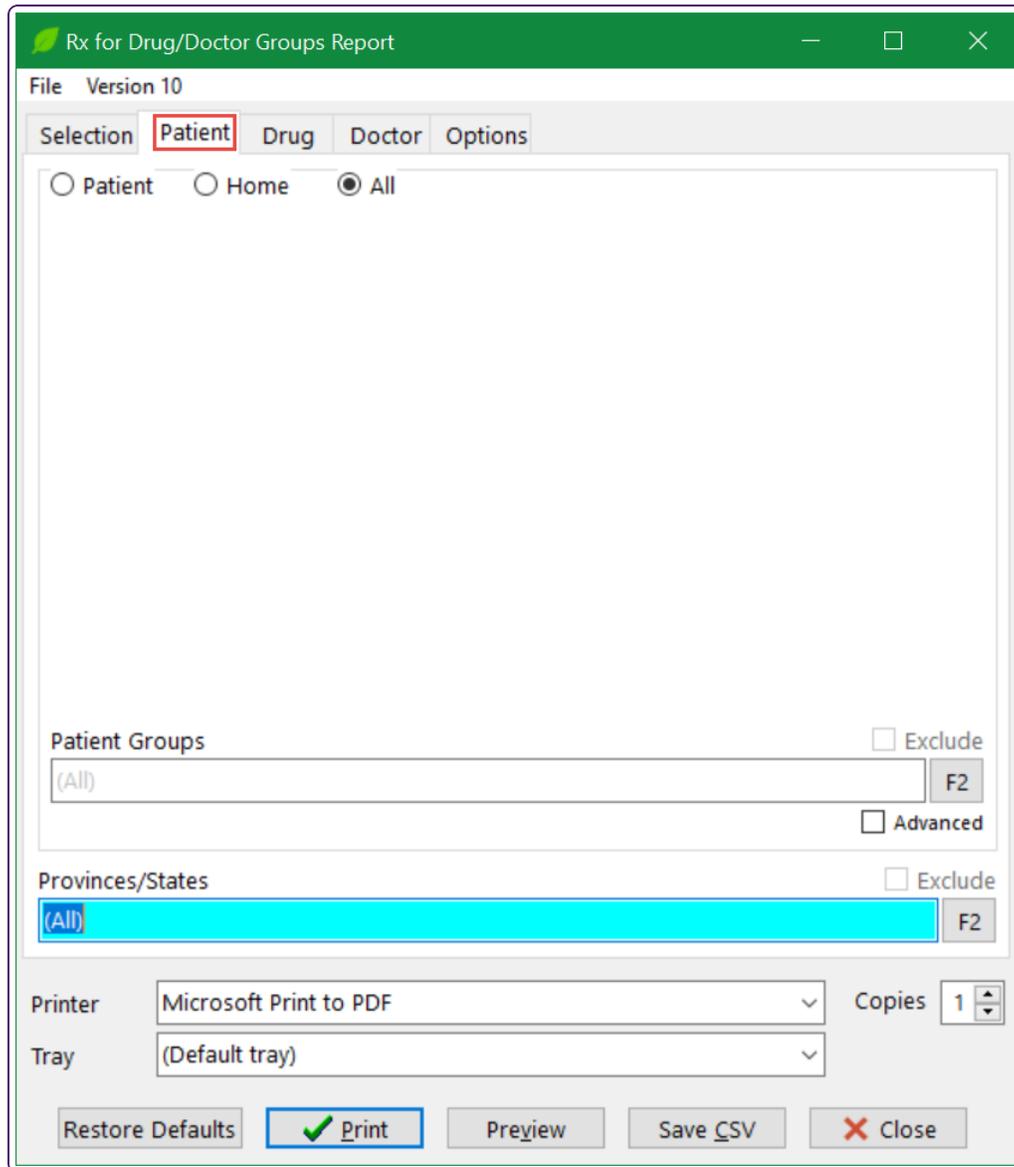
Rx Doctor Authorization: All Rx's

Printer: Microsoft Print to PDF Copies: 1

Tray: (Default tray)

Restore Defaults Print Preview Save CSV Close

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.

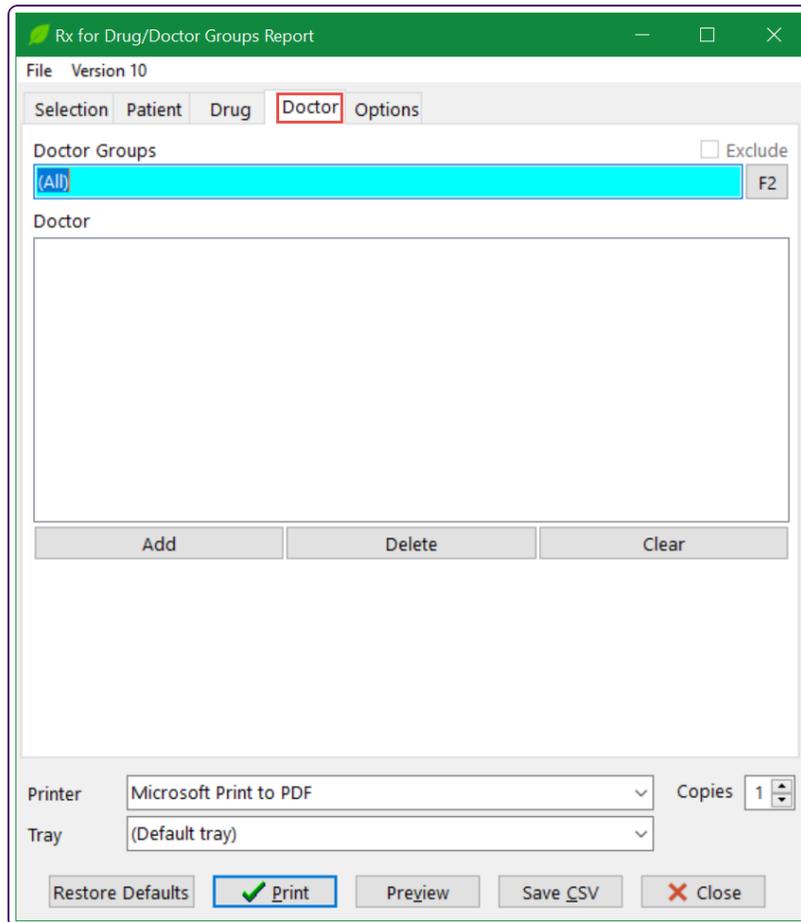
4. From the **Drug** tab:

- 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.

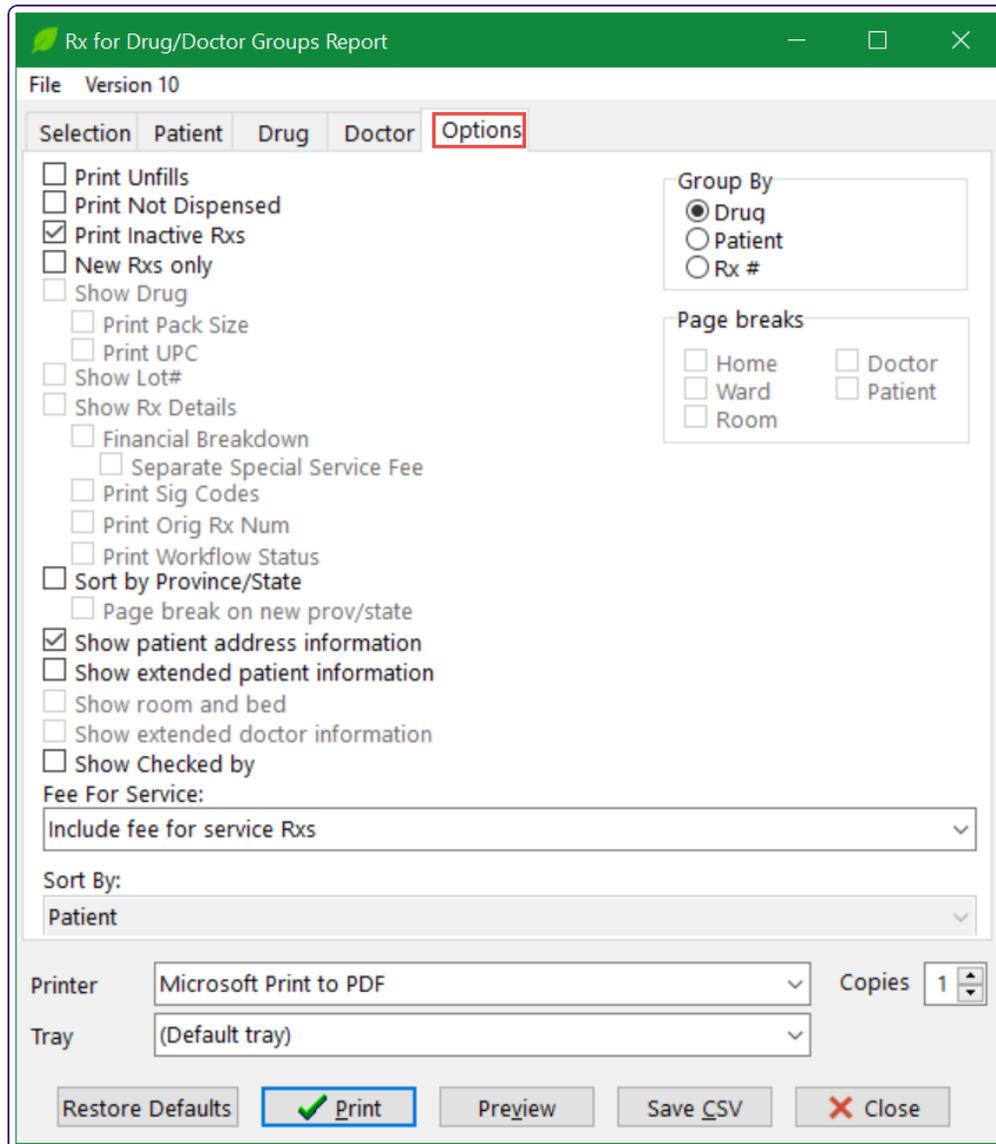
5. From the **Doctor** tab:



- 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.

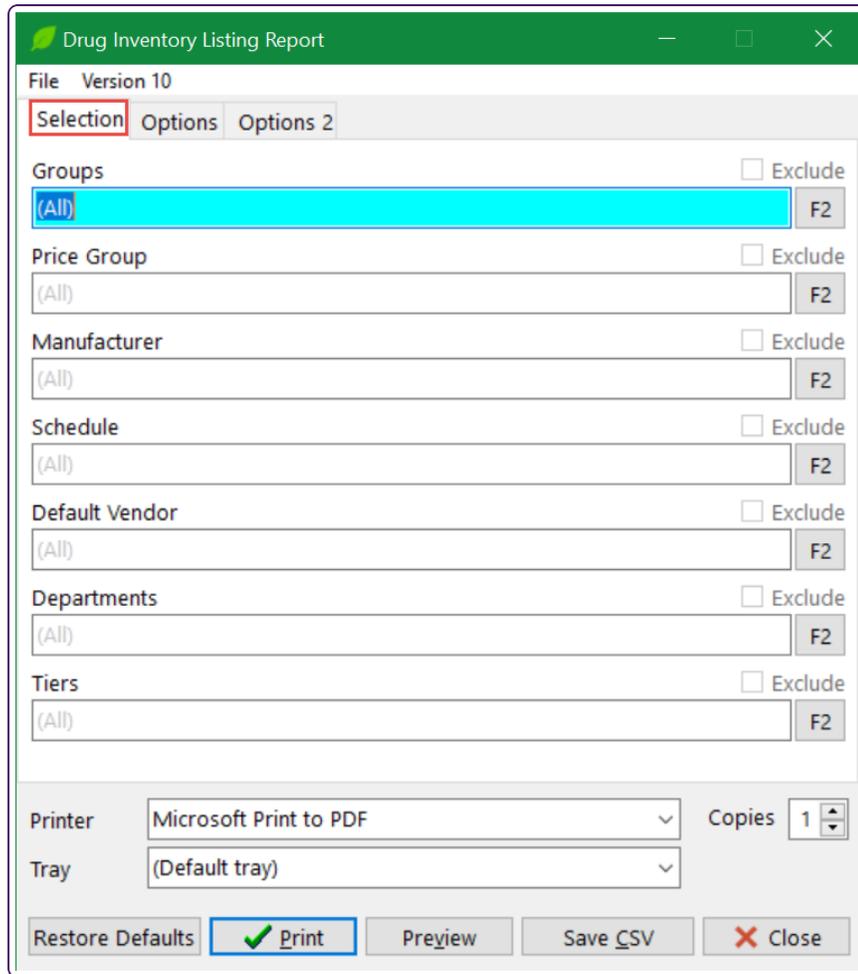
- The most common fields that should be enabled are described below:
 - **Print Unfills:** Includes all unfills (Rxs placed on Hold).
 - **Print Not Dispensed:** Includes all Rxs marked as Not Dispensed (i.e. OTC Rxs).
 - **Print Inactive:** Includes all Rxs with a status of Inactive.
 - **New Rxs only:** 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.

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:

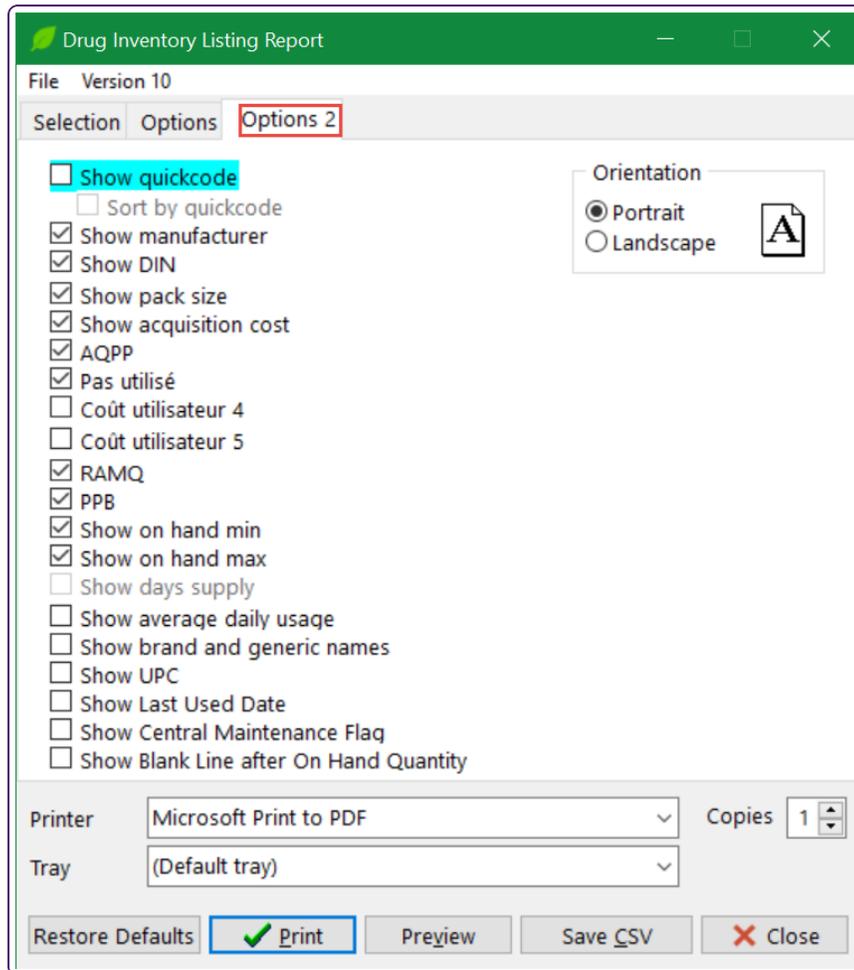
The screenshot shows the 'Drug Inventory Listing Report' dialog box with the 'Options' tab selected. The dialog includes the following sections and controls:

- Pack Status:** Radio buttons for Active, Inactive, and Either (selected).
- On Hand (per pack):** Checkboxes for Less Than Zero, Equal To Zero, and Greater Than Zero.
- Options:**
 - Include "no inventory adjustment" packs
 - Show only packs not dispensed since 10/12/2024
 - Print packs with inventory value greater than 0
 - Show where Brand name between and
 - Show only Drugs with On hand Qty Greater than 0 days supply
 - Show inventory total only
 - Show inventory waiting to be packaged or picked up
 - Show only Drugs excluded from Kroll price updates
- Sort:** Not specified. F2
- Printer:** Microsoft Print to PDF
- Copies:** 1
- Tray:** (Default tray)
- Buttons:** Restore Defaults, Print (checked), Preview, Save CSV, Close (X)

- 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	NOV	00176206	100	200.00	100	0	200	0	250	___	0.0	500.00
Asa/caffeine/butalbital/codeine												
Fiorinal C 1/4 15mg CAP	NOV	00176192	100	163.00	100	0	200	0	25	___	0.0	40.75
Asa/caffeine/butalbital/codeine												
Oxycontin 10mg TAB	PPF	02202441	60	46.27	100	100	200	200	100	___	1.0	77.12
Oxycodone HCl												
Percodan 5mg/325mg TAB	BQU	01916572	25	19.54	300	0	500	0	100	___	0.0	78.16
Oxycodone HCl / ASA												
Percodan 5/325mg TAB	BQU	00580236	25	19.54	100	0	200	0	100	___	0.0	78.16
Oxycodone HCl/ASA												
Percodan Demi 2.5mg/325mg TAB	BQU	01916556	100	61.99	50	0	100	0	100	___	0.0	61.99
Oxycodone HCl/asa												
Tylenol With Codeine #3 30mg TAB	JNO	02163926	100	2.00	500	0	1000	0	500	___	0.0	10.00
Acetaminophen/CodeinePhosphateCpd												
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:

The screenshot shows the 'Drug Inventory History Report' dialog box with the 'Selection 2' tab active. The dialog has a green title bar and a menu bar with 'File' and 'Version 10'. Below the menu bar are three tabs: 'Selection', 'Selection 2', and 'Options'. The 'Selection 2' tab contains three sections: 'Drug Tiers', 'Drug Departments', and 'Drug'. Each section has a text input field and an 'F2' button. The 'Drug Tiers' field contains '(All)' and is highlighted in cyan. The 'Drug Departments' field also contains '(All)'. The 'Drug' field is empty. Below these fields are three buttons: 'Add', 'Delete', and 'Clear'. At the bottom of the dialog, there are printer settings: 'Printer' set to 'Microsoft Print to PDF', 'Copies' set to '1', and 'Tray' set to '(Default tray)'. At the very bottom are five buttons: 'Restore Defaults', 'Print' (with a green checkmark), 'Preview', 'Save CSV', and 'Close' (with a red X).

- 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:

Drug Inventory History Report

File Version 10

Selection Selection 2 Options

Print each drug pack on a new page

Show DIN

Show Schedule

Show Reportable

Show Acq cost

Show Primary Vendor's Item Number

Show Secondary Vendor's Item Number

Show Dollar Value of Units moved

Show Manufacturer

Show Brand/Generic Type

Show Reason for Inventory Change

Wrap Full Reason

Show Drug Packs That Had Inventory Discarded

Sort By:

BrandName

Printer: Microsoft Print to PDF

Copies: 1

Tray: (Default tray)

Restore Defaults Print Preview Save CSV Close

- **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.

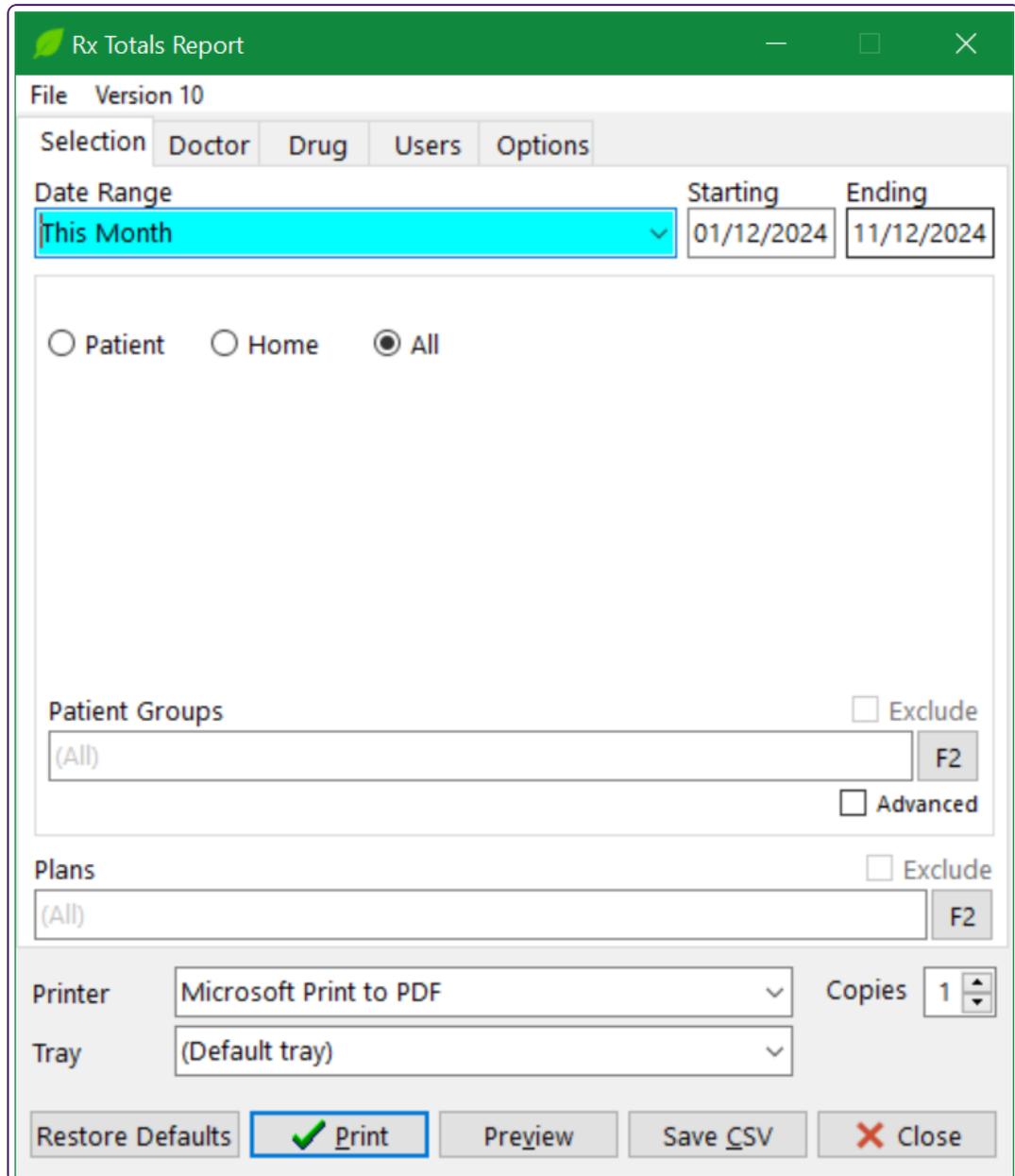
Drug Inventory History Report								
Test Pharmacy, Greenwoods way, Edmonton AB J4J 4J4 (780) 555-5555 Fax: (780) 444-4444								
Report Parameters								
Date Range - 08/10/2014 to 08/10/2014								
Drugs - Crestor 40mg								
Drug Inventory History Report							Printed on: 08/10/2014 13:15:27	
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 Rx's, repeat Rx's, total Rx's, 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.



Rx Totals Report

File Version 10

Selection Doctor Drug Users Options

Date Range Starting Ending
This Month 01/12/2024 11/12/2024

Patient Home All

Patient Groups Exclude
(All) F2 Advanced

Plans Exclude
(All) F2

Printer Microsoft Print to PDF Copies 1

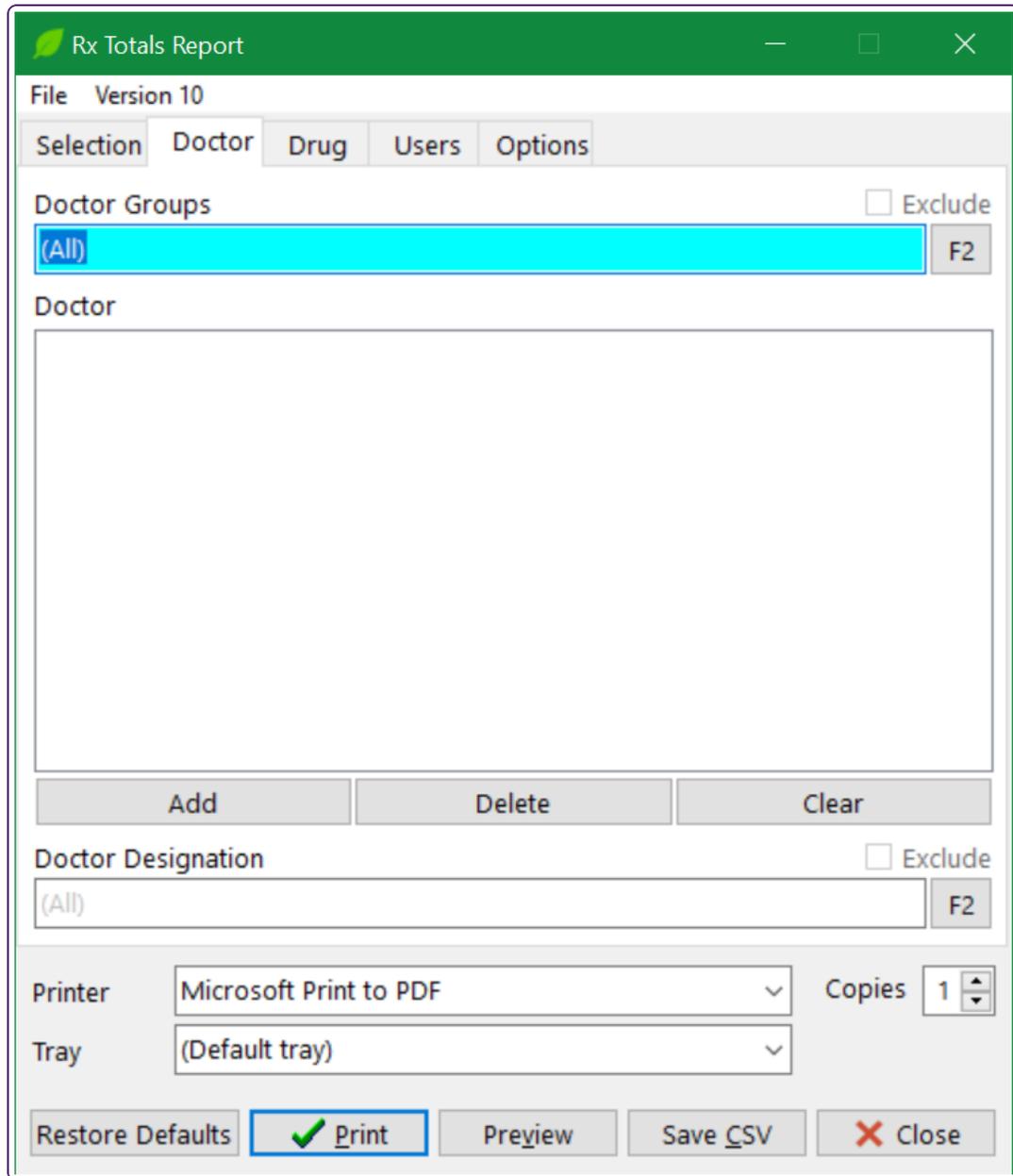
Tray (Default tray)

Restore Defaults **Print** Preview Save CSV Close

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:



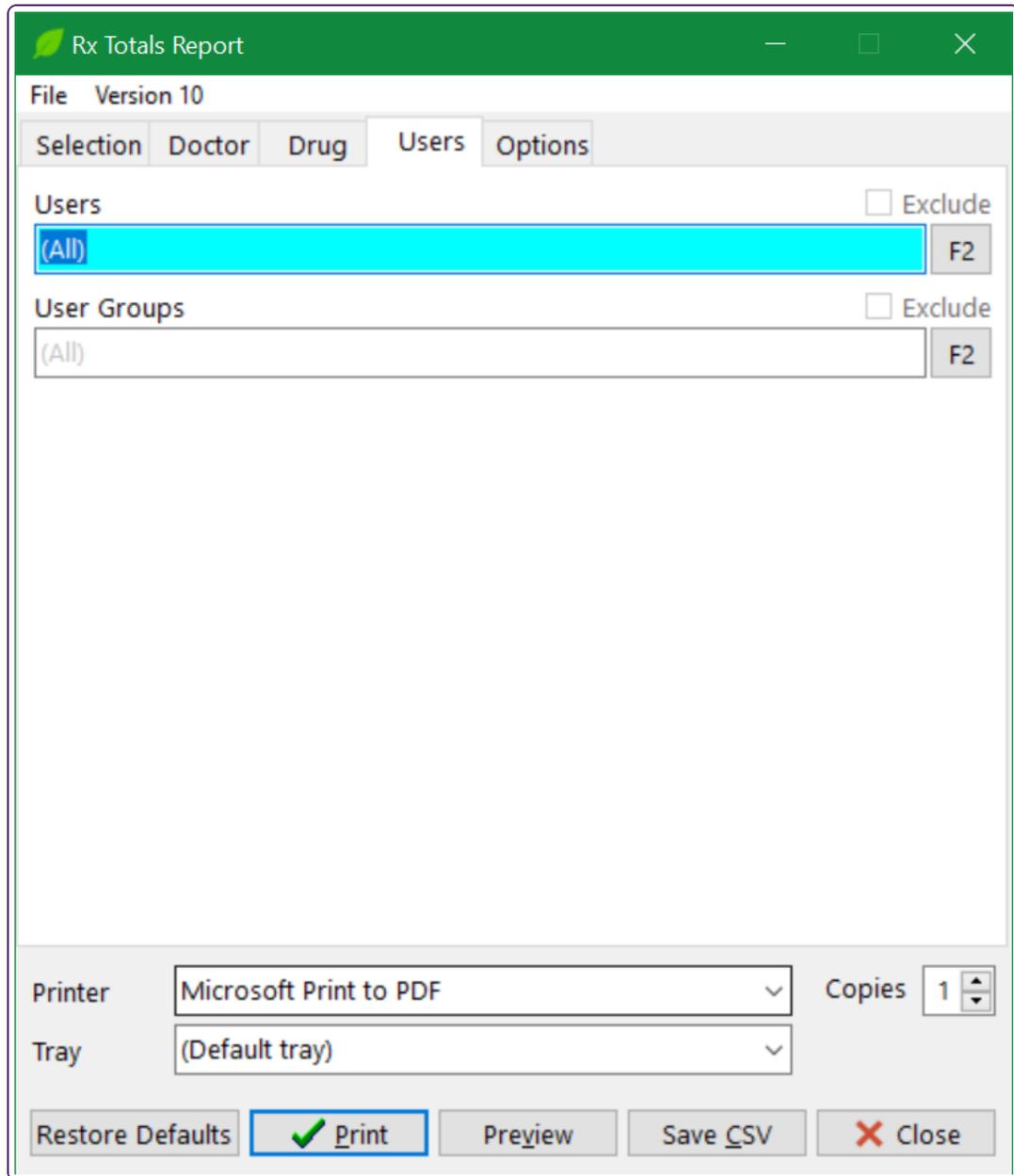
- Select the **F2** button next to the **Doctor Groups** field to select the doctor groups you want to include in the report.
- To generate the report for specific prescribers only, select the **Add** button below the **Doctor** field, then search for and select each prescriber you want to include in the report.

4. From the **Drug** tab:

The screenshot shows the 'Rx Totals Report' application window. The title bar is green and contains the text 'Rx Totals Report' and standard window controls. Below the title bar is a menu bar with 'File' and 'Version 10'. A tabbed interface is visible with tabs for 'Selection', 'Doctor', 'Drug', 'Users', and 'Options'. The 'Drug' tab is active. Under the 'Drug' tab, there are two sections: 'Drug Price Groups' and 'Drug Groups'. Each section has a list box containing '(All)' and an 'F2' button to its right. There are also 'Exclude' checkboxes for each section. At the bottom of the window, there are printer settings: 'Printer' set to 'Microsoft Print to PDF' and 'Copies' set to '1'. Below that is a 'Tray' dropdown set to '(Default tray)'. At the very bottom, there are five buttons: 'Restore Defaults', 'Print' (with a green checkmark icon), 'Preview', 'Save CSV', and 'Close' (with a red X icon).

- 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:

Rx Totals Report File Version 10

Selection Doctor Drug Users **Options**

Summary only
 Show address information
 Show percentages of total
 Print NH-inactive patients
 Print deceased patients
 Print discharged patients
 Include unfilled Rxs

Group By
 Patient
 Patient age
 Doctor
 Med type
 Therapeutic Class
 User

Show
 All
 Top 10 # of Rxs

Fee For Service:
 Include fee for service Rxs

Printer: Microsoft Print to PDF
 Tray: (Default tray)
 Copies: 1

Restore Defaults **Print** Preview Save CSV Close

- **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.

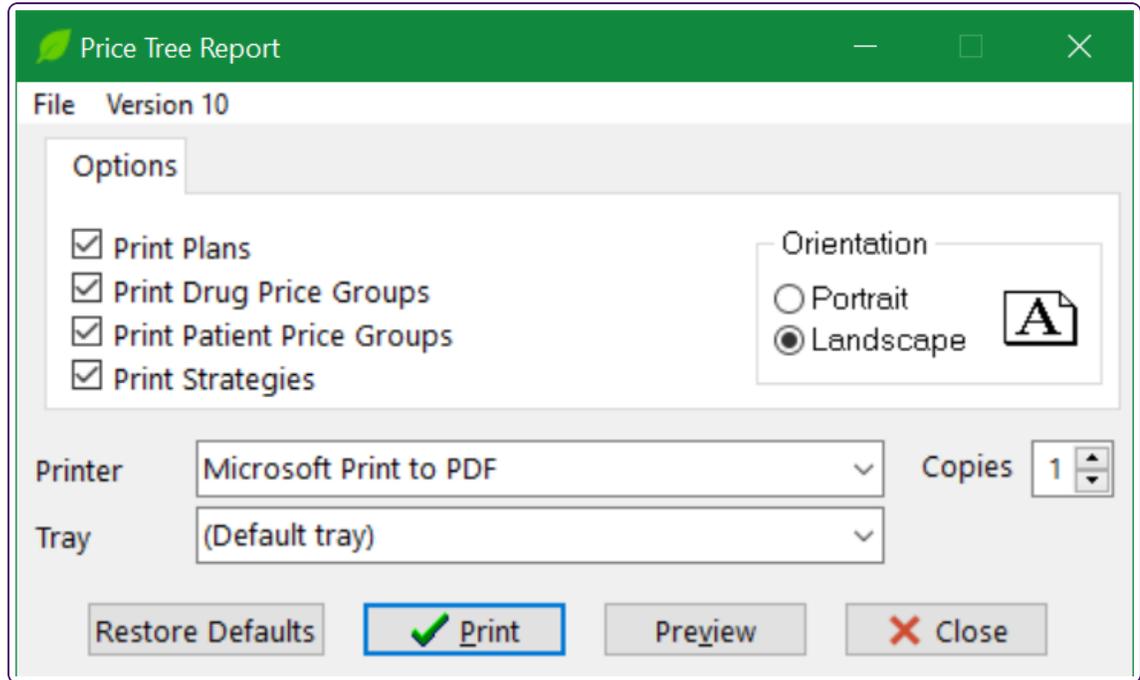
Rx Totals Report								
Test Pharmacy, Greenwoods way, Edmonton AB J4J 4J4 (780) 555-5555 Fax: (780) 444-4444								
Report Parameters								
Fill Date - 01/10/2014 to 07/10/2014								
Group by patient								
Rx Totals Report							Printed on: 07/10/2014 18:54:23	
FF = First Fill								
FF	Patient	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.



The screenshot shows a window titled "Price Tree Report" with a green header bar. Below the header is a menu bar with "File" and "Version 10". The main area is titled "Options" and contains several settings:

- Four checked checkboxes: "Print Plans", "Print Drug Price Groups", "Print Patient Price Groups", and "Print Strategies".
- An "Orientation" section with two radio buttons: "Portrait" (unselected) and "Landscape" (selected). A document icon with a large 'A' is next to the "Landscape" option.
- A "Printer" dropdown menu set to "Microsoft Print to PDF".
- A "Copies" spinner box set to "1".
- A "Tray" dropdown menu set to "(Default tray)".

At the bottom of the dialog are four buttons: "Restore Defaults", "Print" (highlighted with a blue border and a green checkmark), "Preview", and "Close" (with a red 'X' icon).

2. Select the items you want included in the report.

- Click **Preview** to preview the report or **Print** to generate a printout of the report.

Price Tree Report
 Test Pharmacy, Greenwood 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	Pharmacy ID	Strategy	Default Pricing	Sec. Plan Pricing	Ignore Prc Grp
			Type	Brand/Generic Type				
Alberta Blue Cross	ABC		(AB Blue Cross)	99992003				
			Regular/Mixture Formulary	Any Brand/Generic Type	ON Cash	-	No	No
				Any Brand/Generic Type	ON Green Shield			
Assure Health	AHE		(Assure)	ON997400046				
			Regular/Mixture Formulary	Any Brand/Generic Type	ON Non-Formulary	-	No	No
				Any Brand/Generic Type	ON Third Party			
Canadian Armed Forces (National Defence)	CAF		(Canadian Forces)					
			Regular/Mixture Formulary	Any Brand/Generic Type	ON Non-Formulary	-	No	No
				Any Brand/Generic Type	ON Third Party			
Cash	CASH		All	Any Brand/Generic Type	ON Cash	-	No	No
Claim Secure	CS		(ClaimSecure)	S 123123123				
			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	GS		(Green Shield)					
			Regular/Mixture Formulary	Any Brand/Generic Type	ON Green Shield Non Formulary	-	No	No
				Any Brand/Generic Type	ON Green Shield			
			Exceptions: GS Smoking Cessation Program		GreenShield Smoking Cessation			
HBC	TEST		(Zellers Employee)					
			All	Any Brand/Generic Type	testy test	-	No	No
Indian Affairs (NIHB)	IA		(NIHB)					
			Regular/Mixture Formulary	Any Brand/Generic Type	ON NIHB Non Formulary	-	No	No
				Any Brand/Generic Type	ON NIHB			
Johnson's Insurance	JOHN		(Johnsons Insurance)					
			All	Any Brand/Generic Type	ON Non-Formulary	-	No	No
MDM	MDM		(MDM Insurance)					
			All	Any Brand/Generic Type	ON Non-Formulary	-	No	No
Nexgen Rx	NX		(Nexgen Rx)					
			All	Any Brand/Generic Type	ON Non-Formulary	-	No	No
Nunatsiavut Government, Dept. Of Health	NNT		(Nunatsiavut)					
			All	Any Brand/Generic Type	ON Third Party	-	No	No
Olympia Trust	OLY		(Olympia Trust)					
			All	Any Brand/Generic Type	ON Third Party	-	No	No
Ontario Blue Cross	OBC		(ON Blue Cross)					
			All	Any Brand/Generic Type	ON Third Party	-	No	No
Ontario Drug Benefits	ODB		(ODB)					
			Regular/Mixture Formulary	Any Brand/Generic Type	ON Non-Formulary	-	No	No
				Any Brand/Generic Type	ON ODB			

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	All	Any Brand/Generic Type	another test
compliance patients		Yes	All	All	Any Brand/Generic Type	compliance
high fee		Yes	All	All	Any Brand/Generic Type	another test
test NH		No	All	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
another test	Purchase		418.00		Apply Markup To
compliance	Purchase		5.00		
markup 10%					
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					
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					
When the Cost is >= to 0.01 then Add to the Markup 15 % of the Cost					
ON NIHB	ODB(BAP)		8.85		
10% 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					
When the Cost is >= to 0.01 then Add to the Markup 15 % of the Cost					
ON Non-Formulary	Purchase		10.49		
10% 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					
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					
When the Cost is >= to 0.01 then Add to the Markup 10 % of the Cost					
testy test	Purchase		2.00		

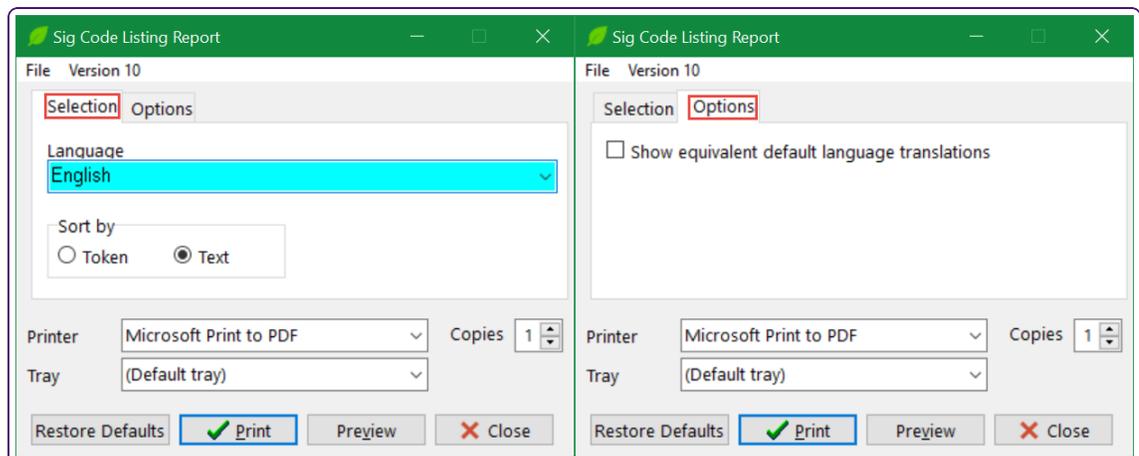
Sig Code Listing Report

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	
SigCodeListing Report	
Token	Text
*1	TAKE 1 TABLET ONCE DAILY
*1C	TAKE 1 CAPSULE ONCE A DAY
*1P	TAKE 1 TEASPOON(5ML)ONCE DAILY
*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 BED TIME
1-2	1 OR 2
1.5T	TAKE 1 AND 1/2 TABLETS
1.5TS	TAKE 1 & 1/2 TEASPOONSFUL(7.5ML)
1/21T	TAKE 1/2 TO 1 TABLET
1/2H	1/2 HOUR
1/2T	TAKE 1/2 TABLET
1/2TS	TAKE 1/2 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	TAKE 1 TO 2 TEASPOONSFUL
1BID	TAKE TWICE A DAY FOR 1 DAY
1C	TAKE 1 CAPSULE
1ENBID	USE 1 SPRAY IN EACH NOSTRIL TWICE DAILY
1ENQD	USE 1 SPRAY IN EACH NOSTRIL DAILY
1H	1 HOUR
1P	APPLY ONE PATCH
1ST	FIRST
1T	TAKE 1 TABLET
1TB	TAKE 1 TABLETSOONFUL(15ML)
1THS	AND 1 TABLET AT BED TIME

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**.

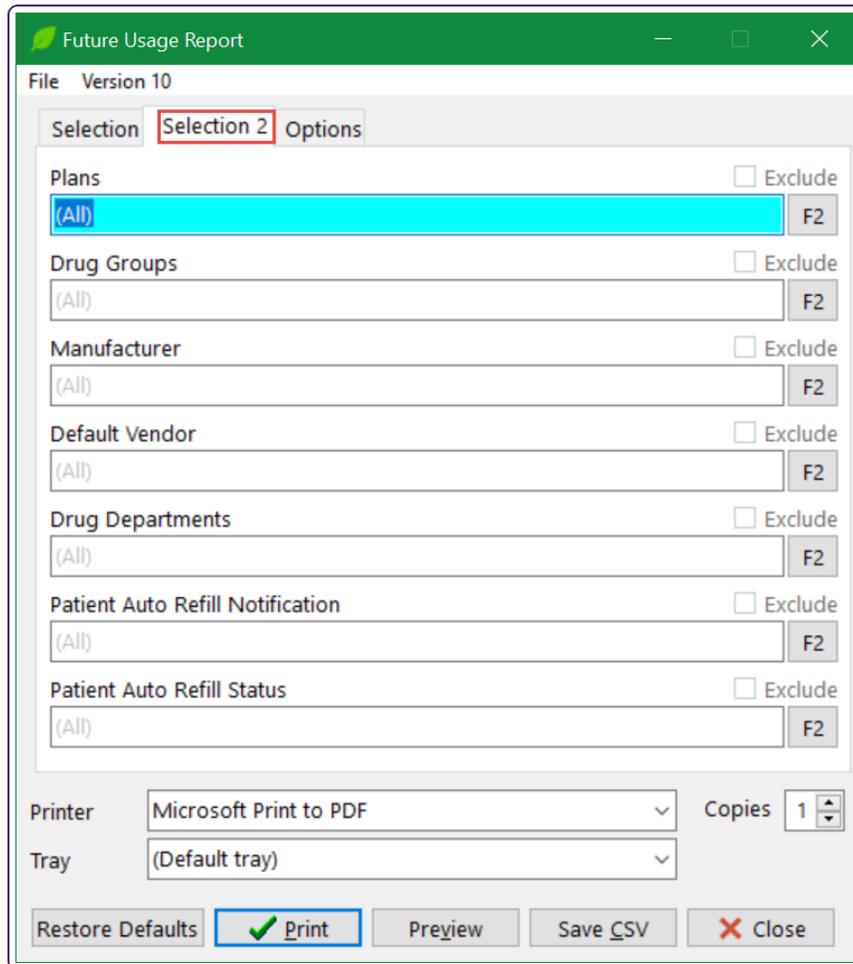
The **Future Usage Report** form is displayed.

2. From the **Selection** tab:

The screenshot shows the 'Future Usage Report' application window. The title bar reads 'Future Usage Report'. Below the title bar is a menu bar with 'File' and 'Version 10'. The main area has three tabs: 'Selection' (highlighted with a red box), 'Selection 2', and 'Options'. Under the 'Selection' tab, there are three sections: 1) 'Date Range' with a dropdown menu showing 'Today' (highlighted in cyan), and two text boxes for 'Starting' and 'Ending' dates, both containing '16/12/2024'. 2) Three radio buttons labeled 'Patient', 'Home', and 'All', with 'All' selected. 3) A 'Patient Groups' text box containing '(All)', an 'F2' button to its right, and an 'Advanced' checkbox below it. At the bottom of the form, there are two dropdown menus: 'Printer' set to 'Microsoft Print to PDF' and 'Tray' set to '(Default tray)'. To the right of these is a 'Copies' dropdown set to '1'. At the very bottom are five buttons: 'Restore Defaults', 'Print' (with a green checkmark icon), 'Preview', 'Save CSV', and 'Close' (with a red X icon).

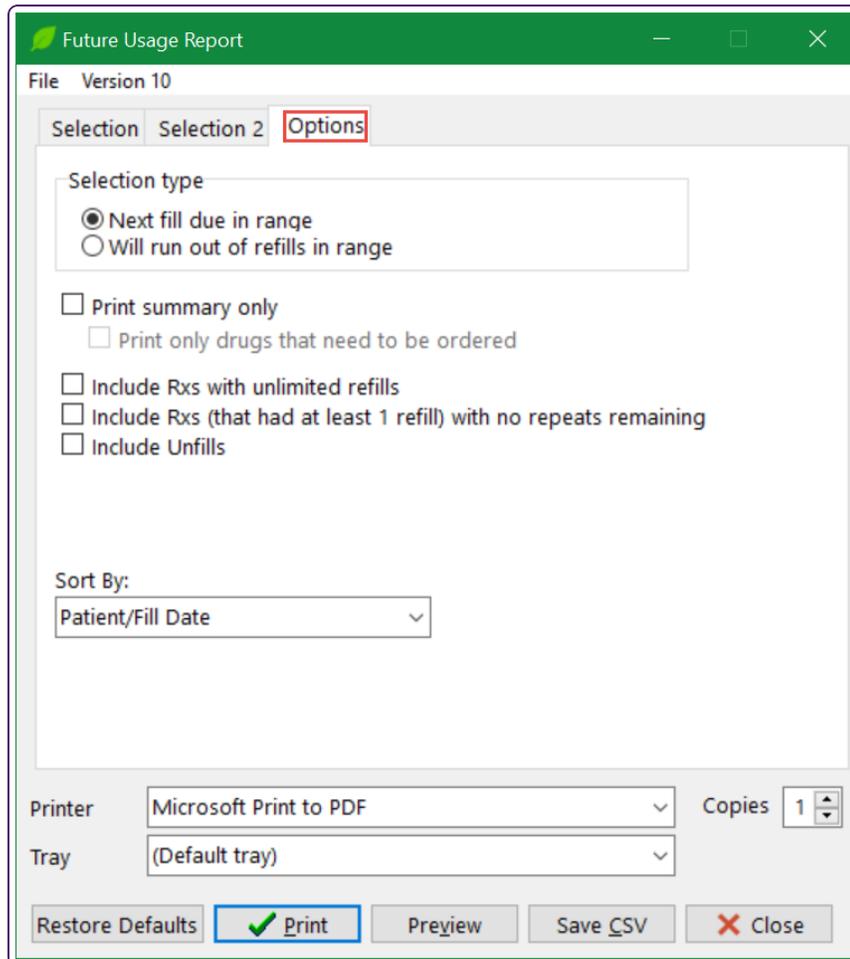
- Use the **Date Range**, **Starting**, and **Ending** fields to specify a date range.
- To generate the report for specific patients only, select the **Patient** button and select **Add**. Search for and select the patients you want to include in the report.
- To generate the report for specific nursing 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.

- From the **Options** tab, select the parameters you want applied to the report.



- Select **Preview** to preview the report or **Print** to generate a printout of the report.

Future Usage Report									
Test Pharmacy, Greenwood 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									
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	(546) 545-45	
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.

Compliance Label

File Version 10

Selection Selection 2 Options

Effective Date 16/12/2024 # of Weeks 1

Patient Home All

Patient Groups (All) Exclude F2

Advanced

Start Patient F2 Clear

End Patient F2 Clear

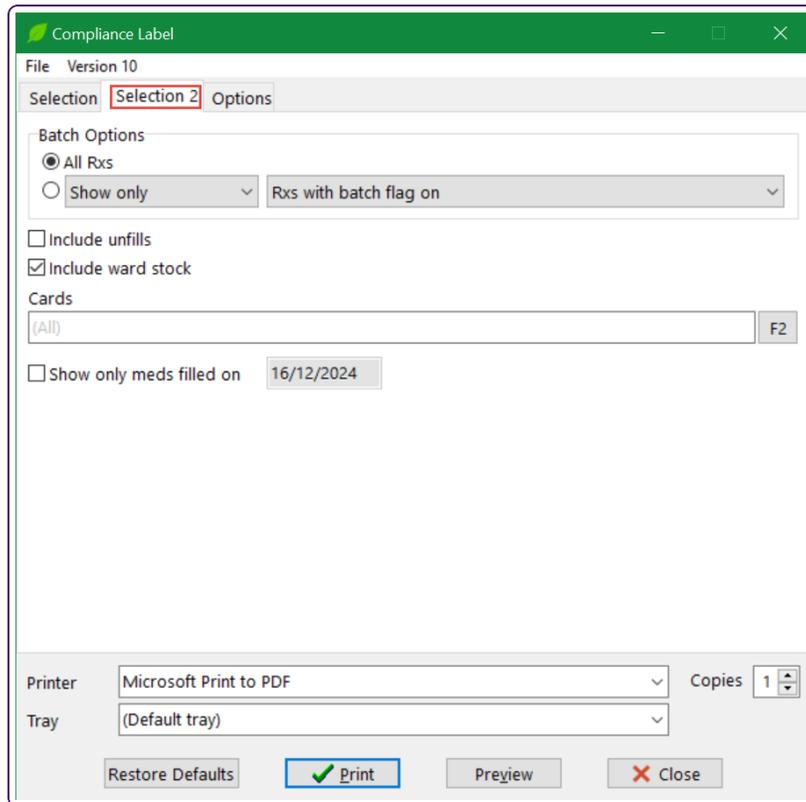
Printer Microsoft Print to PDF Copies 1

Tray (Default tray)

Restore Defaults Print Preview Close

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:

The screenshot shows the 'Compliance Label' application window with the 'Selection 2' tab active. The interface includes a menu bar with 'File' and 'Version 10'. Below the menu bar, there are two tabs: 'Selection' and 'Options', with 'Selection 2' highlighted. The main area contains several sections: 'Batch Options' with radio buttons for 'All Rxs' (selected) and 'Show only', and a dropdown menu for 'Rxs with batch flag on'; 'Include unfills' (unchecked) and 'Include ward stock' (checked) checkboxes; a 'Cards' field with '(All)' and an 'F2' button; and 'Show only meds filled on' with a date field set to '16/12/2024'. At the bottom, there are printer settings for 'Microsoft Print to PDF' and 'Copies 1', a 'Tray' dropdown set to '(Default tray)', and four buttons: 'Restore Defaults', 'Print' (with a green checkmark), 'Preview', and 'Close' (with a red X).

- 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.

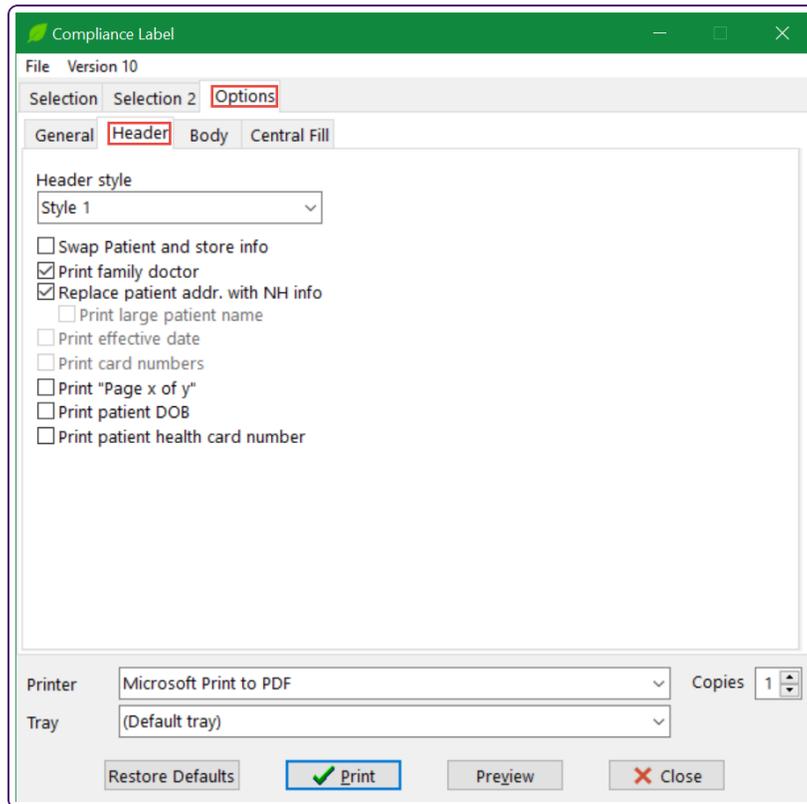
4. From the **Options > General** tab:

The screenshot shows the 'Compliance Label' software interface. The window title is 'Compliance Label Version 10'. The 'Options' tab is selected, and the 'General' sub-tab is active. The interface includes the following elements:

- Pass Time fields:** Pass Time 1 (8:00), Pass Time 2 (12:00), Pass Time 3 (17:00), Pass Time 4 (21:00).
- Offset fields:** X Offset: 0 mm, Y Offset: 0 mm.
- Checklist:** Print compliance checklist.
- Panels section:** Radio buttons for 1 panel, 2 panels, 4 panels (selected), and 6 panels.
- Start Label:** A 2x2 grid with panels numbered 1, 2, 3, and 4.
- Remember last panel:** Remember last panel.
- Sort By:** Patient (dropdown).
- Med Sort:** Orig Rx # (dropdown).
- Printer:** Microsoft Print to PDF (dropdown).
- Tray:** (Default tray) (dropdown).
- Copies:** 1 (spinner).
- Buttons:** Restore Defaults, Print (highlighted with a green checkmark), Preview, Close.

- 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.

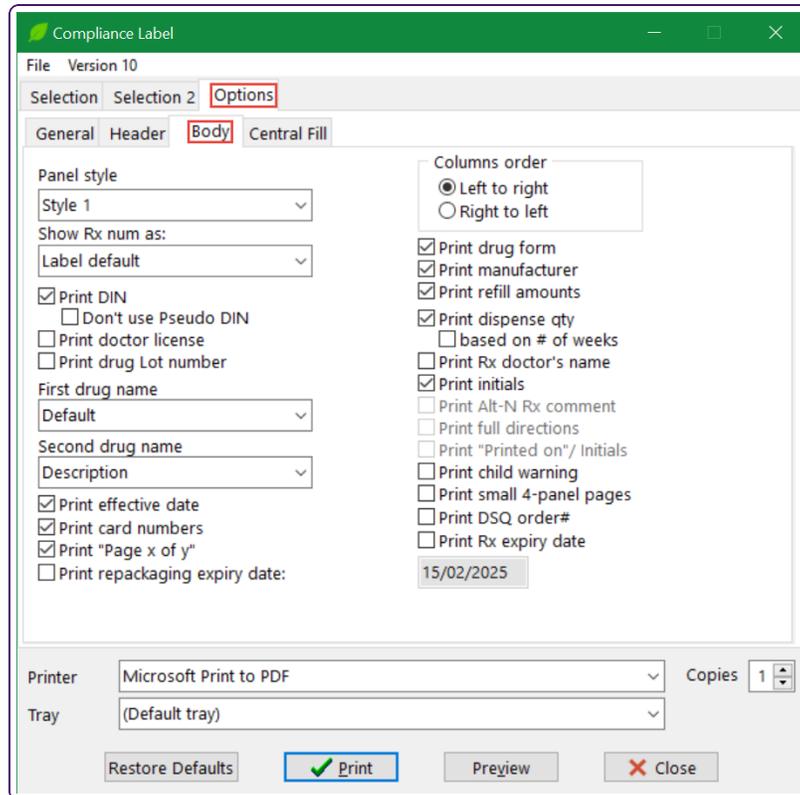
5. From the **Options > Header** tab:



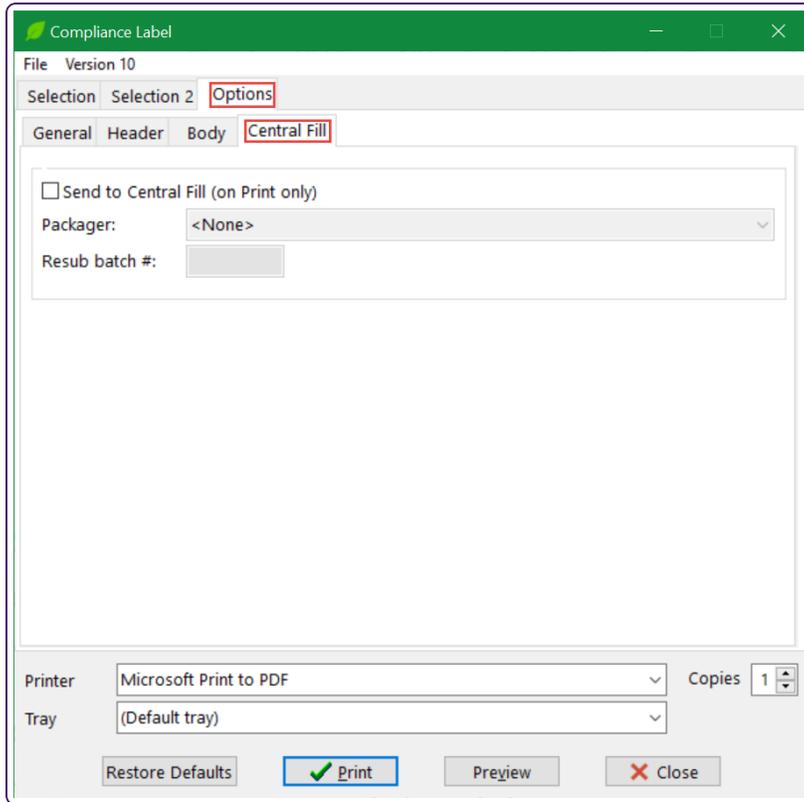
- Select the **Header style**.
- To change the position of the patient and store information on the report, select **Swap Patient and store info**.
- To include the family doctor on the report, select **Print family doctor**.
This information comes from the **Family Doctor** field on the patient card.
- 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		Kroll Pharmacy				Smith, John		Dr. Westheimer, Ruth					
100 Yonge St Toronto, ON M1M 1M1		200 Krollwin Drive Toronto, ON N1N 1N1				22 Bloor St W Toronto, ON M6H 2D3 (555) 111-1111		220 Duman Mill Rd Suite 204 Toronto, ON M6H 2D3 (555) 444-4444					
Rx#	Form	Drug	8:00	12:00	17:00	21:00	Rx#	Form	Drug	8:00	12:00	17:00	21:00
Fill date	MFR	Directions	Init		Description		Fill date	MFR	Directions	Init		Description	
DIN	REFILL						DIN	REFILL					
9000029	TAB	10 Propoxyphene HCl 65mg		1			9000018	TAB	20 642 Tablets 65mg				
07-Mar-2014	PPI	TAKE 1 TABLET ONCE DAILY					08-Jan-2014	PPI	TAKE 1 TABLET ONCE DAILY				
00010081	0						00010081	0					
9000028	TAB	10 ASA/Meprobamate/Codiene Phosphate 350/200/15mg		1			1000029	GM	10 Acnomel				
07-Mar-2014	PPI	TAKE 1					08-Jan-2014	NUM	TAKE 1 TABLET ONCE DAILY				
02238646	0						02247557	0					
1000038	TAB	10 Escitalopram 20mg					1000024	CAP	60 Apo-Erythro E-C 250mg				
17-Mar-2014	LUN	TAKE 1 TABLET ONCE DAILY					20-Dec-2013	APX	ASDIRECTED				
02263254	0						00726672	0					
1000035	POW	10 Paclitaxel 100mg/vial		1									
07-Mar-2014	BTC	TAKE 1 TABLET ONCE DAILY											
02281066	0												

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 Rx's; 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 Rx's 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, Rx's 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, Rx's 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:

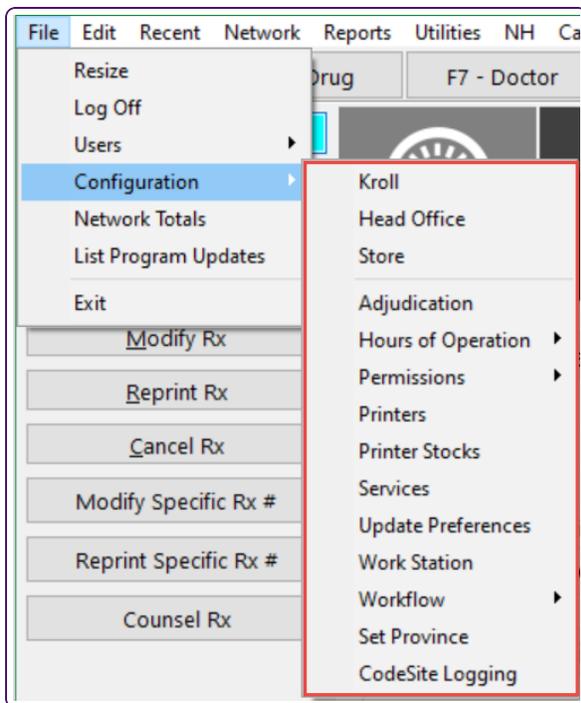
- Do not compare fill date-based reports with adjudication date-based reports. When in doubt, look at the report header to determine which date is being used.
- Do not compare the Plan Summary report with other reports.
- Always compare reports printed on the same date. Refer to the **Printed On** date on the report header.

- Be aware of how previous-period reversals are reported. Always use the “Net” amount columns when comparing reports.

Chapter 31

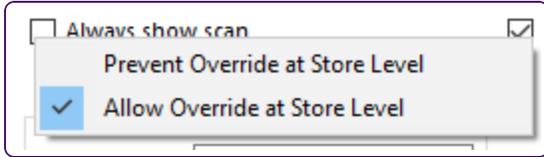
Configuration

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 Rx's 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

Head Office Level Configuration Parameters

General Patient Drug Doctor Rx FDB Adjudication Labels Delivery Reports Security Interfaces Order X - AR Y - To Do Cleanup

1 - General 2 - Agent

Provincial plan: None

Provincial plan label: Provincial Plan

Quick code label: Quick Code

Quick code type: (NONE)

Prompt to create AR account for NH patients

Profile

- Hide cancels in all profiles
- Hide cancels in Rx detail
- Hide cancels in the "Active" (Shift-F5) profile
- Hide expired Rxs in the "Active" (Shift-F5) profile
- Hide stopped Rxs in the "Active" (Shift-F5) profile
- Retain highlight

Search

Ignore provincial plans Ignore clinical plans

Consent

- Prompt for patient privacy consent
- Require patient privacy consent to fill Rx
- Require guardian consent for patients under age: N/A
- Enable consent for authorized agent
- Enable delivery authorization
- Prompt for delivery consent

Default unit dose patient price group: <None>

Default patient card tab

For retail patients: General

For NH patients: Nursing Home

Automatically close autofill batch if successful

Require gender on patient card

Require postal code on patient card

Allow duplicate quick codes

Creatinine Clearance equation: Using body weight

Include copied patient in original patient's family: Always

Default clinical conditions: ICD10CA

Prompting

- Prompt to print labels when inactivating Rxs from profile or Rx screen
- Prompt to complete delivery order
- Prompt to select allergy ingredients when selecting FDB medication names
- Prompt to add new or modified plans to existing Rxs
- Prompt for Billing/Delivery on alternate addresses

Patient Document Retention

Type: Since Last Date of Service

Retain documents for: 10 years and 0 months

Retain the following patient reports when run:
Fax Doctor report, Rx Transfer Out report, (+More)

Enable bill to by default on first new alternate address

Require postal code on alternate addresses

Search OK Cancel

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 Rx's are hidden in the patient profile.
Hide cancels in Rx detail	If selected, cancelled Rx's are hidden in the Rx detail.
Hide cancels in the "Active" (Shift-F5) profile	If selected, cancelled Rx's are hidden from the Active Rx's view.
Hide expired Rx's in the "Active" (Shift-F5) profile	If selected, expired Rx's are hidden from the Active Rx's view.

Name	Description
Hide stopped Rx's in the "Active" (Shift-F5) profile	If selected, stopped Rx's are hidden from the Active Rx's view.
Retain highlight	If selected, any Rx's 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 Rx's 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 Rx's	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 Rx's.
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

Head Office Level Configuration Parameters

General Patient Drug Doctor Rx FDB Adjudication Labels Delivery Reports Security Interfaces Order X - AR Y - To Do Cleanup

1 - General 2 - Agent

	Non-Authoritative Caregiver				Authoritative Caregiver			
	Adult Dependent		Minor Dependent		Adult Dependent		Minor Dependent	
	Default	Read-only	Default	Read-only	Default	Read-only	Default	Read-only
Order or pickup Rx's	<input checked="" type="checkbox"/>	<input type="checkbox"/>						
Receive counselling on patient's behalf	<input checked="" type="checkbox"/>	<input type="checkbox"/>						
Request Reports	<input checked="" type="checkbox"/>	<input type="checkbox"/>						
View accounts receivable	<input checked="" type="checkbox"/>	<input type="checkbox"/>						
Add, view or cancel appointments	<input checked="" type="checkbox"/>	<input type="checkbox"/>						
Change demographics	<input checked="" type="checkbox"/>	<input type="checkbox"/>						
Change plans	<input checked="" type="checkbox"/>	<input type="checkbox"/>						
Change packaging preferences	<input checked="" type="checkbox"/>	<input type="checkbox"/>						
Sign legal documents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Authorize or revoke agents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Relationships for Authoritative Caregivers of an adult
 F2

Relationships for Authoritative Caregivers of a minor
 F2

Search

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.

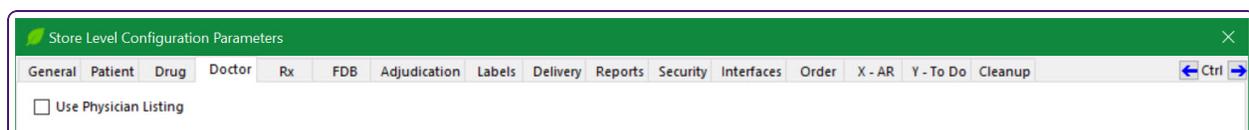
Drug

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: <ul style="list-style-type: none"> ■ 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 screenshot shows the 'Store Level Configuration Parameters' dialog box with the 'Rx' tab selected. The 'General' sub-tab is active. The 'Days before an Rx expires' section has 'Regular' set to 365. The 'Warnings' section has 'Warn' set to 90 days. The 'Changes' section has several options checked for refills and unfills. The 'Rx User Field 1' is set to 'Statut de l'utilisateur'.

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	<p>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.</p> <p>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.</p>
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

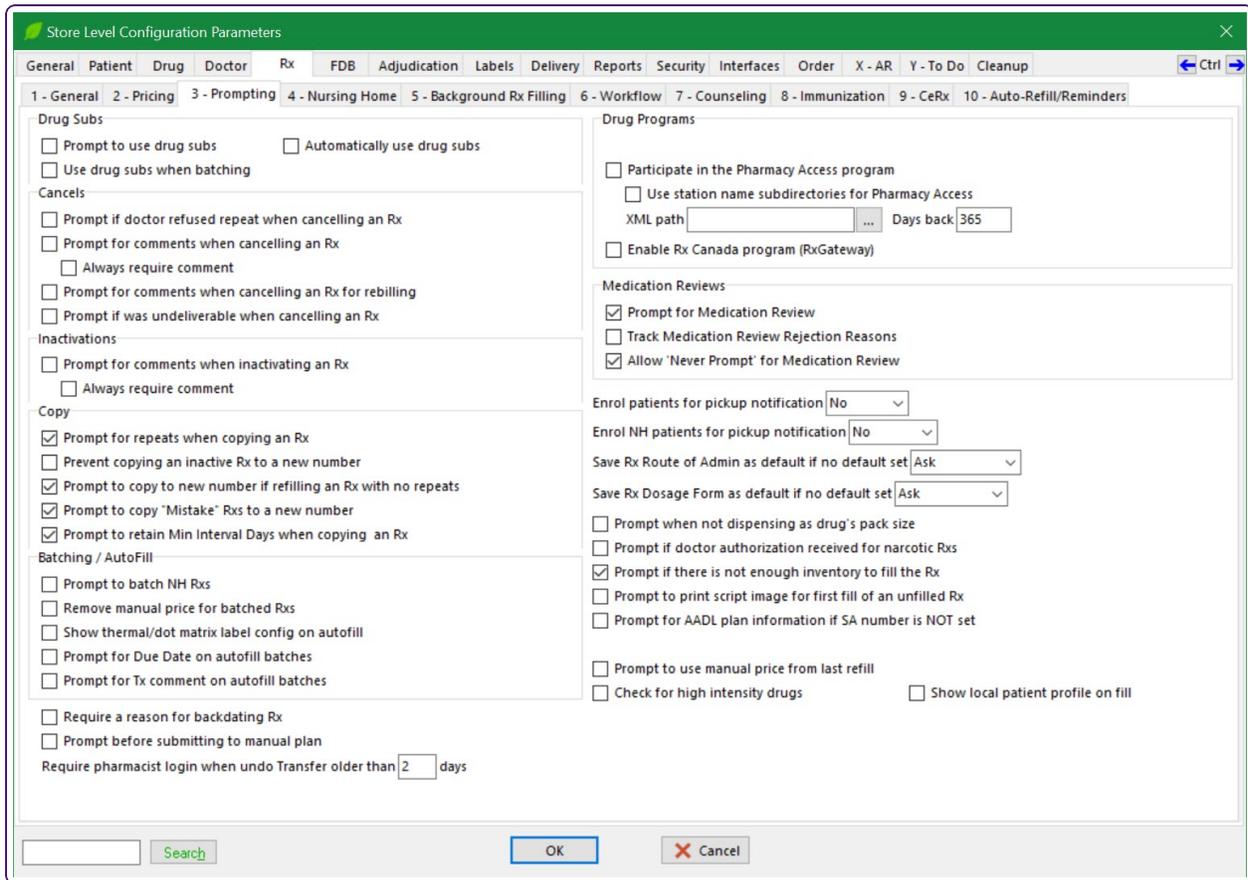
The screenshot shows the 'Store Level Configuration Parameters' window with the 'Rx' tab selected. The 'Pricing' sub-tab is active. The 'Plans' section includes dropdowns for 'Provincial (Formulary Drugs)' (RAMQ), 'Clinical Provincial' (DSQ), and 'Narcotic Monitoring' (None). Below this are several checkboxes: 'If patient has provincial plan but Rx is cash, use provincial plan pricing' (unchecked), 'If Purch + 0% is greater than Cost+Markup then charge Purchase+ 10%' (unchecked), and 'Ignore for provincial plan' (unchecked). There is a dropdown for 'Apply the difference to the' set to 'Cost'. A 'Warnings' section contains checkboxes for 'Warn if there are lower priced formulary items' (unchecked) and 'Only for provincial plan' (unchecked), along with input fields for 'Warn if Gross Profit is less than' and 'Warn if drug pack cost level is older than'. Other checkboxes include 'Allow copay adjustment after adjudication' (checked), 'Always use formulary cost level if applicable' (unchecked), 'Don't use formulary pricing if product selection is Patient's Choice or Physician's Choice' (unchecked), and 'Use Aggressive ODB Frequency Of Dispensing Fee Adjudication' (unchecked). The bottom of the window has a search bar, 'Search', 'OK', and 'Cancel' buttons.

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: <ul style="list-style-type: none"> ■ 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 error, 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.

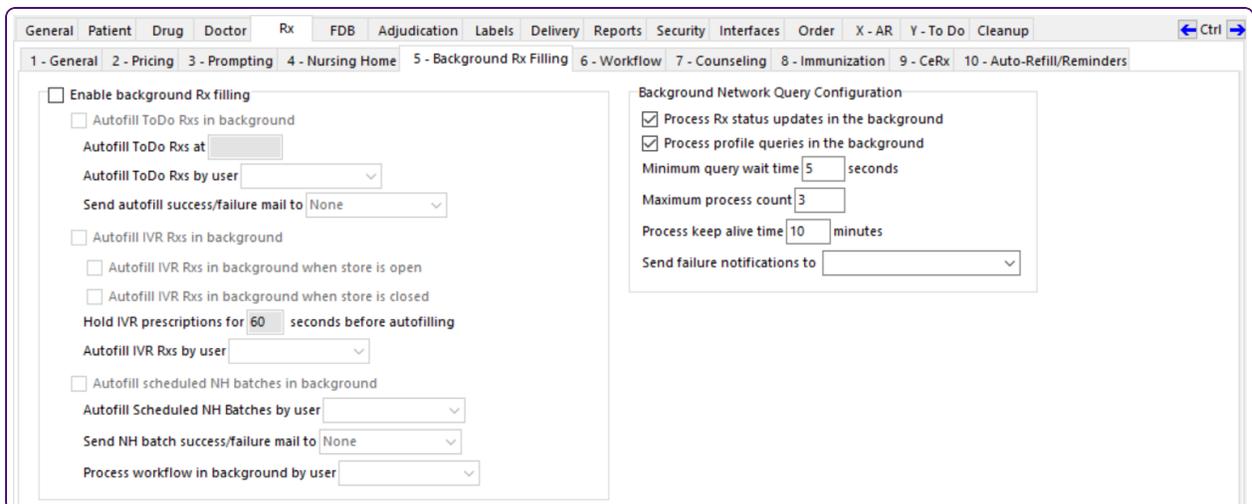
Nursing Home



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 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	<p>If selected, a patient profile query is sent to Alberta Netcare when:</p> <ul style="list-style-type: none"> ■ 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. <p>The patient profile query is sent in the background.</p>
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 screenshot shows the 'Store Level Configuration Parameters' dialog box with the 'Rx > Workflow' tab selected. The dialog is divided into several sections:

- Workflow selection matrix:** A dropdown menu is set to 'Thermal Labels Advanced Workflow'.
- Require Rx Due Date when filling:** An unchecked checkbox.
- Require data re-verification when modifying:** A text input field with 'F2' next to it.
- Delivery Route Types:** A dropdown menu is set to 'Pickup'. Below it are several checkboxes:
 - Enable Store Delivery delivery route type (unchecked)
 - Enable Mail Order/Courier delivery route type (unchecked)
 - Allow Patient to choose Pickup route type (checked)
 - Allow Patient to choose Store Delivery route type (unchecked)
 - Allow Patient to choose Mail Order/Courier route type (unchecked)
 - Allow Patient to choose Central Fill Ship to Patient route type (unchecked)
- Rx Date/Time Options:** An unchecked checkbox for 'Use current time of day for Rx start time'.
- Pickup Bin Management:** An unchecked checkbox for 'Force scanning pickup bin after placing every Rx'.
- Prescription Pickup:**
 - Show items picked up in last 1 hours (input field).
 - Force confirmation scanning of prescriptions (unchecked).
 - Allow confirmation scanning of work order (unchecked).
 - Track person picking up Rxs (unchecked):
 - Require address of person picking up Rxs (Rx for themselves) (unchecked)
 - Require address of person picking up Rxs (Rx for someone else) (unchecked)
 - Require photo I.D. # of person picking up Rxs (Rx for themselves) (unchecked)
 - Require photo I.D. # of person picking up Rxs (Rx for someone else) (unchecked)
 - Enable electronic signature at pickup (unchecked):
 - Only for narcotic monitoring drugs (unchecked)
 - Only for drug schedules (input field with 'F2' next to it)
 - Track relationship when person picking up Rxs for someone else (unchecked)
 - Allow patient search by scanning Rx number bar code (unchecked)
 - Allow pharmacist to undo a pickup up to 7 days ago (input field).
 - Enable Pickup / Undo Pickup from start screen (checked)
 - Require pharmacist authorization to cancel a picked up Rx (unchecked)
- Packaging:**
 - Show package details on packaging verification screen (checked)
 - Show DIN on packaging screen (unchecked)
- Other options:**
 - Allow workflow queue filtering (unchecked)
 - Decode 2D bar code on inbound documents/faxes (checked)
 - Allow postponing adjudication (checked)
 - Script image:
 - Decode reference number bar code when importing script image (unchecked)
 - Prevent script image reference reuse for 30 days (input field) (unchecked)
 - Require script image reference number for script images (unchecked)
 - Require script image, or reason for no script image, on new Rxs (unchecked)
 - Require script image, or reason for no script image, on NH Rxs (unchecked)
 - Exclude Stock Transfers (non Schedule N and G) (unchecked)
 - Show detached script image window when filling new Rxs (unchecked)
 - Allow Manually Mark as Scanned at POS (unchecked)
 - Configure Default Rx Comment Workflow Alerts (button)

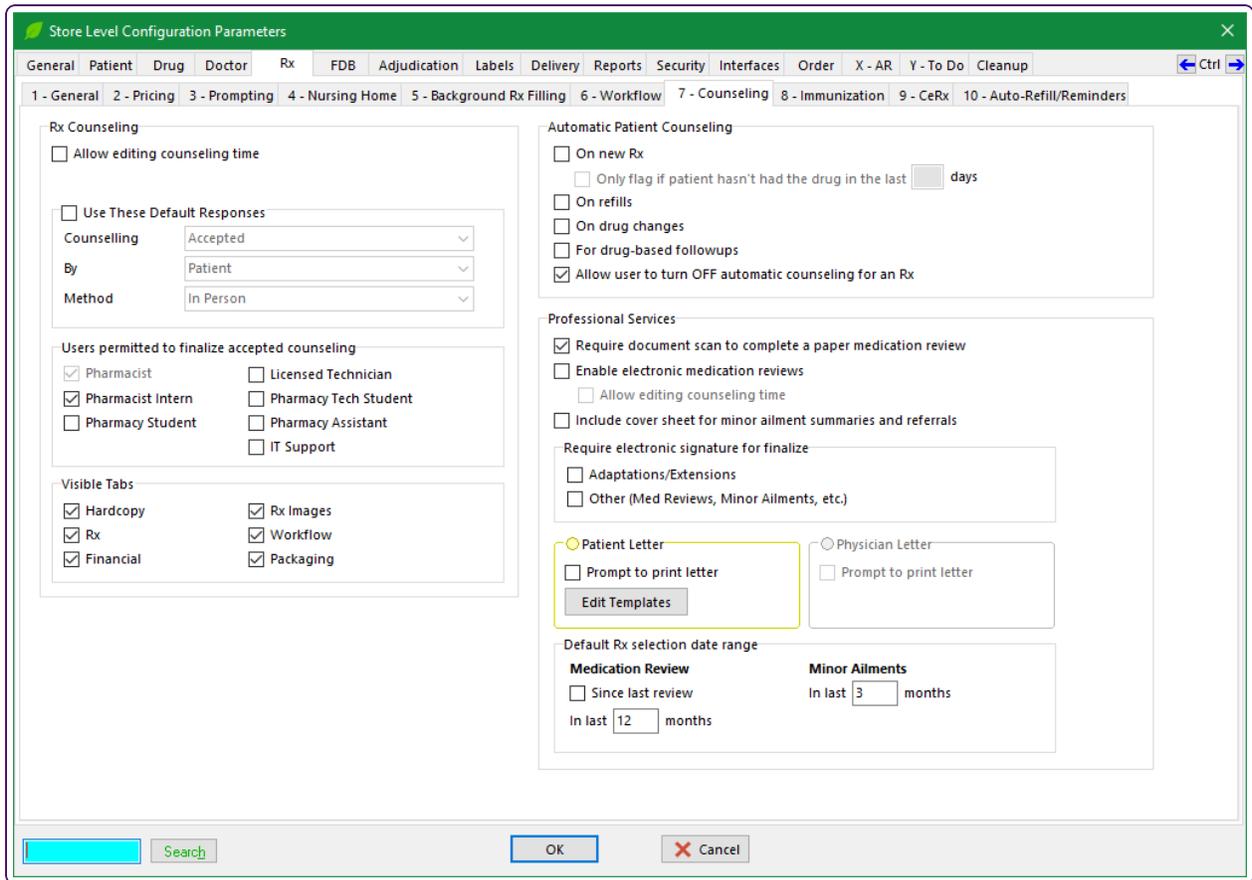
The following table describes the configuration settings on the **Rx > Workflow** tab.

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 Rx 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, Rx's 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.

Counseling



The following table describes the configuration settings on the **Rx > Counseling** 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 Rx's 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 screenshot shows the 'Store Level Configuration Parameters' window with the 'Rx' tab selected and the 'Immunization' sub-tab active. The configuration options are as follows:

- Enable electronic immunizations
 - Require electronic signature for Pharmacists
 - Require UPC Verification of Vaccine Product
 - Allow to use non-influenza immunization products obtained externally
 - Print immunization wallet card
- Allow to use non-influenza immunization Rxs dispensed days ago
- Message on Receipt for patients eligible for Influenza shots
 - Print for retail patients
 - Print for NH patients
 - Message:
 - Font: Font Size:
 -
 - Influenza Season:
 - Start Date:
 - End Date:
 - Min Age:
 - Max Age:
- Record immunization when filling an immunization product or fee Rx not already linked to an 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: <ul style="list-style-type: none"> ■ 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 screenshot shows the 'Store Level Configuration Parameters' dialog box with the 'Rx' tab selected. The 'Default Analyses' section contains the following settings:

- Perform FDB clinical analysis when filling Rxs. Don't check Rx interactions older than 90 days.
- Allergy and Cross-Sensitivity Checking
 - Force confirmation
 - Require authentication
- Drug-Drug Interactions. Max SL: 3
 - Include Alternative Therapy Interactions (9)
 - Force confirmation for Severity at or above 3. (Note: 1 is the most severe, 2 is the 2nd, etc.)
 - Require authentication
- Drug/Disease Contraindications. Max SL: 3
 - Force confirmation for Severity at or above 2
 - Require authentication
- Duplicate Therapy
 - Include same DIN (if active)
 - Force confirmation
 - Require authentication

Other settings include 'Precautions' (checked), 'Min / Max Dosage Checking' (checked), 'Dose Range Checking' (checked), 'Drug Indications' (unchecked), 'Drug Side Effects' (unchecked, Max SL: 1), and 'Drug/Food Interactions' (unchecked, Max SL: 5). The 'FDB display zoom factor' is set to 'Medium'.

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.

Store Level Configuration Parameters

General Patient Drug Doctor Rx FDB Adjudication Labels Delivery Reports Security Interfaces Order X - AR Y - To Do Cleanup

Rx (1) Drug/Mix (2) Patient (3)

Default Analyses

- Allergy Checking
- Drug-Drug Interactions Max SL 3
- Include Alternative Therapy Interactions (9)
- Drug/Disease Contraindications Max SL 3
- Duplicate Therapy
- Precautions
- Min / Max Dosage Checking
- Dose Range Checking
- Drug Indications
- Drug Side Effects Max SL 1
- Drug/Food Interactions Max SL 5

Show empty reports

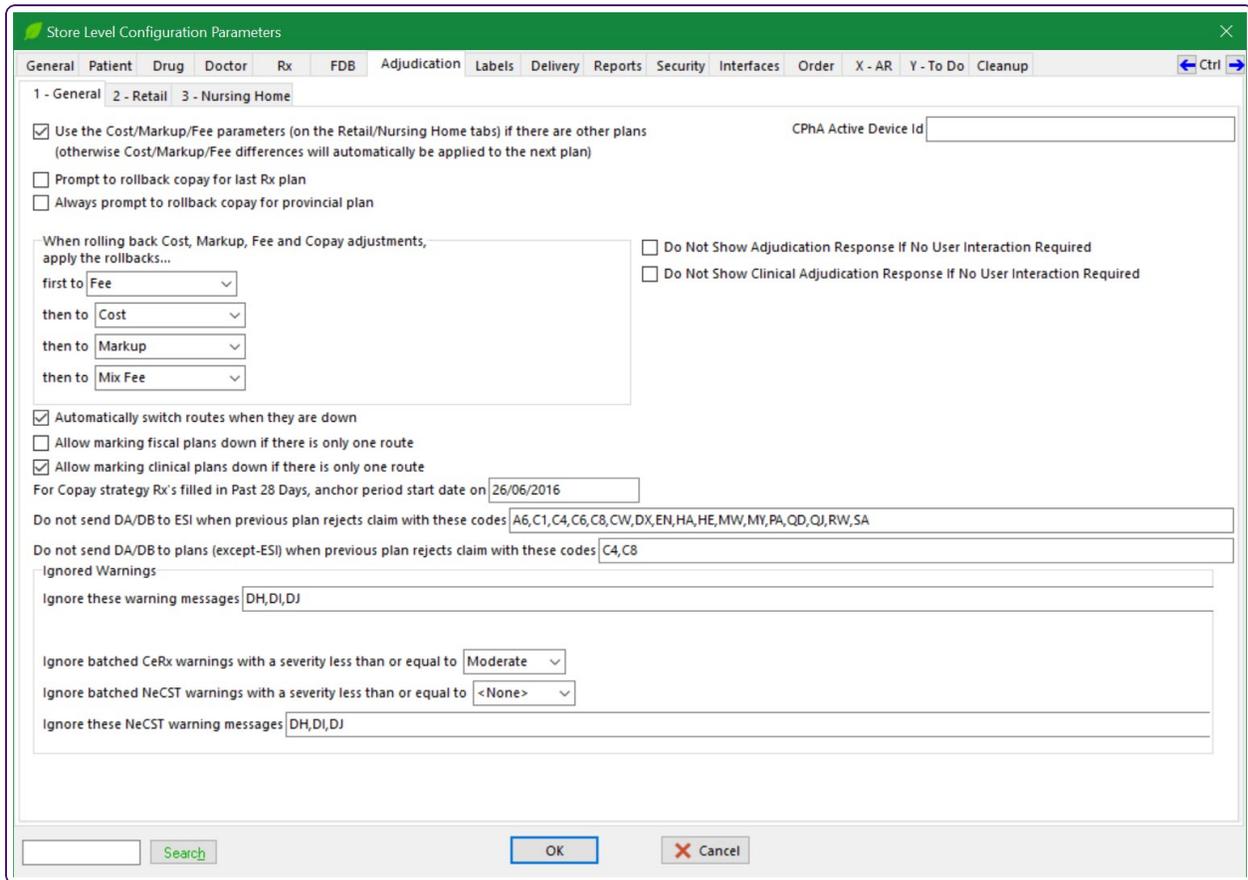
The following table describes the configuration settings on the **FDB > Drug/Mix** and **FDB > Patient** tabs.

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 Rx's and nursing home Rx's; the selected parameters will apply regardless of whether Rx's are filled manually or in a batch.

Store Level Configuration Parameters

General Patient Drug Doctor Rx FDB Adjudication Labels Delivery Reports Security Interfaces Order X - AR Y - To Do Cleanup

1 - General 2 - Retail 3 - Nursing Home

These parameters apply to any Nursing Home Rx's, whether they are filled manually or in a batch.

If the Cost+Markup difference is \leq \$ then discount the difference (0 or blank = do not discount)
(differences between these two values will be passed on to the patient)

If the Cost+Markup difference is $>$ \$ then force pharmacist to review (0 or blank = always pass the difference on to the patient)

If the Fee+Mixfee difference is \leq \$ then discount the difference (0 or blank = do not discount)
(differences between these two values will be passed on to the patient)

If the Fee+Mixfee difference is $>$ \$ then force pharmacist to review (0 or blank = always pass the difference on to the patient)

Automatically credit copays if less than or equal to \$

For CASH Rx's filled in a BATCH, charge a fee for Rx(s) in the

For CASH Rx's filled manually, charge a fee for Rx(s) in the

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 \leq \$ [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 \leq \$ [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 \leq \$ [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 \leq \$ [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 screenshot displays the 'Store Level Configuration Parameters' dialog box, specifically the 'Labels' tab and 'General' sub-tab. The interface includes several sections for configuring label printing:

- Regular labels (retail) and (nursing home):** Both sections feature a dropdown menu set to 'Étiquette Thémique Général Krc' and an 'Advanced' button.
- Printing Options:** Includes dropdowns for 'Print labels for "not dispensed" Rxs' (set to 'Always'), 'Print labels for cancelled Rxs' (set to 'Never'), 'Print labels for unfilled Rxs' (set to 'Always'), and 'Print labels for cancelled Rx when rebilling' (set to 'Prompt'). Checkboxes are present for 'Print labels', 'Preview labels', 'Print labels for unit dose Rxs', 'Print in colour', and 'Show profile and label reprints as filled'.
- Print Options:** Includes dropdowns for 'First drug name' (set to 'Brand') and 'Second drug name' (set to 'Generic'). Checkboxes are present for 'Bold first drug name', 'Prefix second drug name', 'Print salutation with patient's name', 'Print * after Rx num for robotic interface', and 'When prompted to print a label, remember my answer for all labels'. A checkbox for 'Show thermal label configuration on print' is also present.
- Offsets:** A section titled 'Adjust printer label offsets' with input fields for 'Warning label left', 'Dot matrix label left', 'Hardcopy top offset', 'Y offset for bottom labels', and 'Y offset for thermal top', all set to '0 mm'.
- Header:** Includes a 'Font' dropdown (set to 'Calibri'), 'Font Size' (set to '11'), and buttons for 'B', 'I', and 'U'. A 'Print headers...' section has checkboxes for 'On laser labels', 'On NH laser labels', 'On Ontario Standard labels', and 'On lower right label'. A 'For patient "Label Header" comments, replace' dropdown is set to '(NONE)'. A 'Logo' section has radio buttons for 'None', 'Store logo', and 'Pre-printed, width: 15 mm', along with a 'Print Test Page' button.
- Navigation:** A search bar with a 'Search' button and 'OK'/'Cancel' buttons are located at the bottom.

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 screenshot shows the 'Store Level Configuration Parameters' dialog box with the 'Vial' tab selected. The 'General' tab is also visible. The 'Vial' tab contains the following options:

- Print original Rx number
- Print pharmacist initials
- Print manual drug expiry (don't use drug expiry date)
- Print drug DIN (don't use Pseudo DIN)
- Refills:**
 - Print refills on label if zero
 - Print refill expiry
 - Print refill info on unlimited refills
- Print qty remaining instead of refills
- Sig:**
 - Bold sig
 - Print native language if printing foreign sig
 - Print sig before drug info
- Child Warnings:**
 - Print child warning on NH-style laser label
- Unfills:**
 - Print vials for unfills
 - Print watermark for unfills
 - Print warnings for unfills
- Print DOS-style vials
- Always print 2 vial labels
- Always print on all vials on each page
- Print vial labels for Touch OTC Rx's
- Print pass times on NH laser labels
- Use NH-style vials for NH patients:
 - Print home name
 - Print ward name
 - Print room
 - Print bed
 - Print DIN
- Print methadone label on vial 2
- Watermark darkness: 15 %
- Print CF host Rx was sent to
- Print DSQ ids
- Print drug expiry date for...**
 - Non-mixtures
 - Mixtures

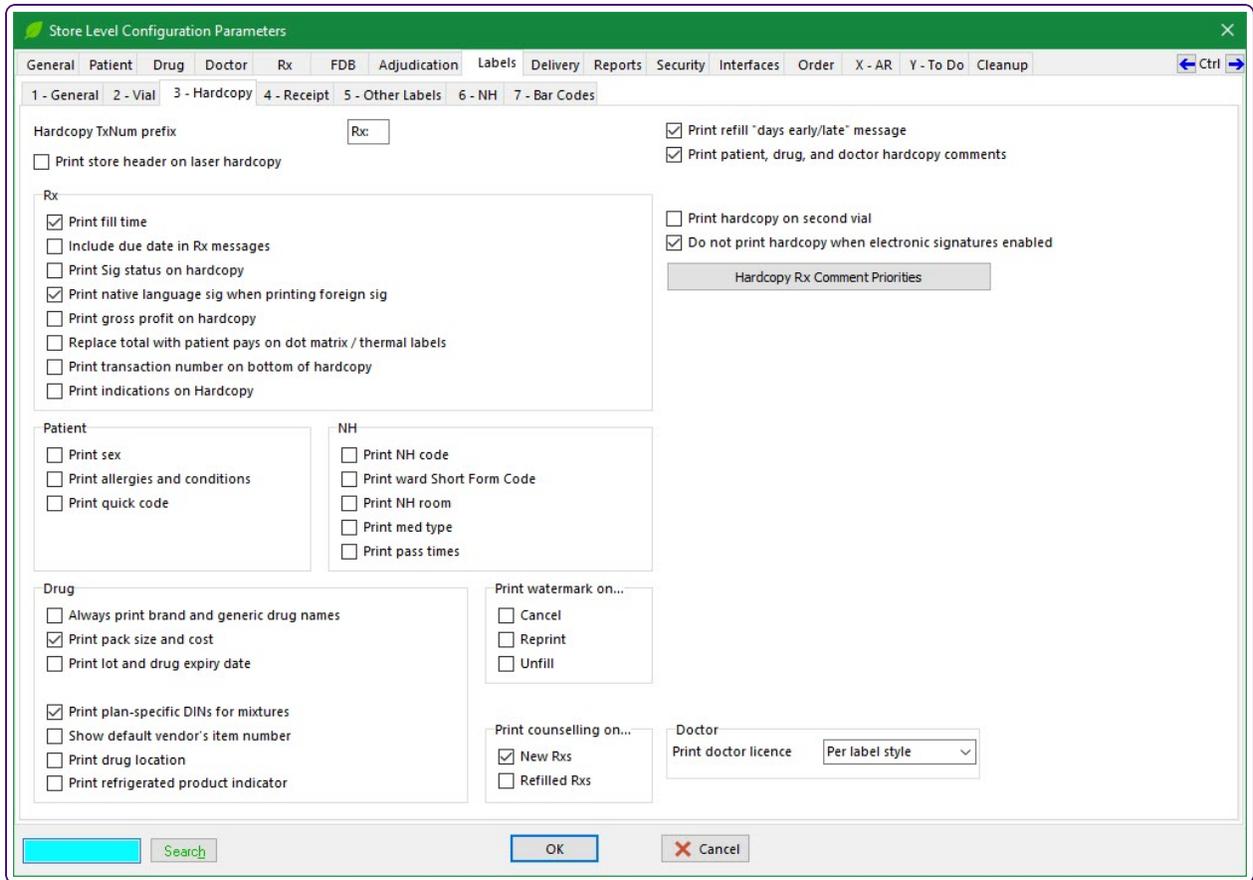
The following table describes the configuration settings on the **Labels > Vial** tab.

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 Rx's	If selected, vial labels are printed for touch pickup OTC Rx's.

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 Rx's.
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 Rx's.
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.

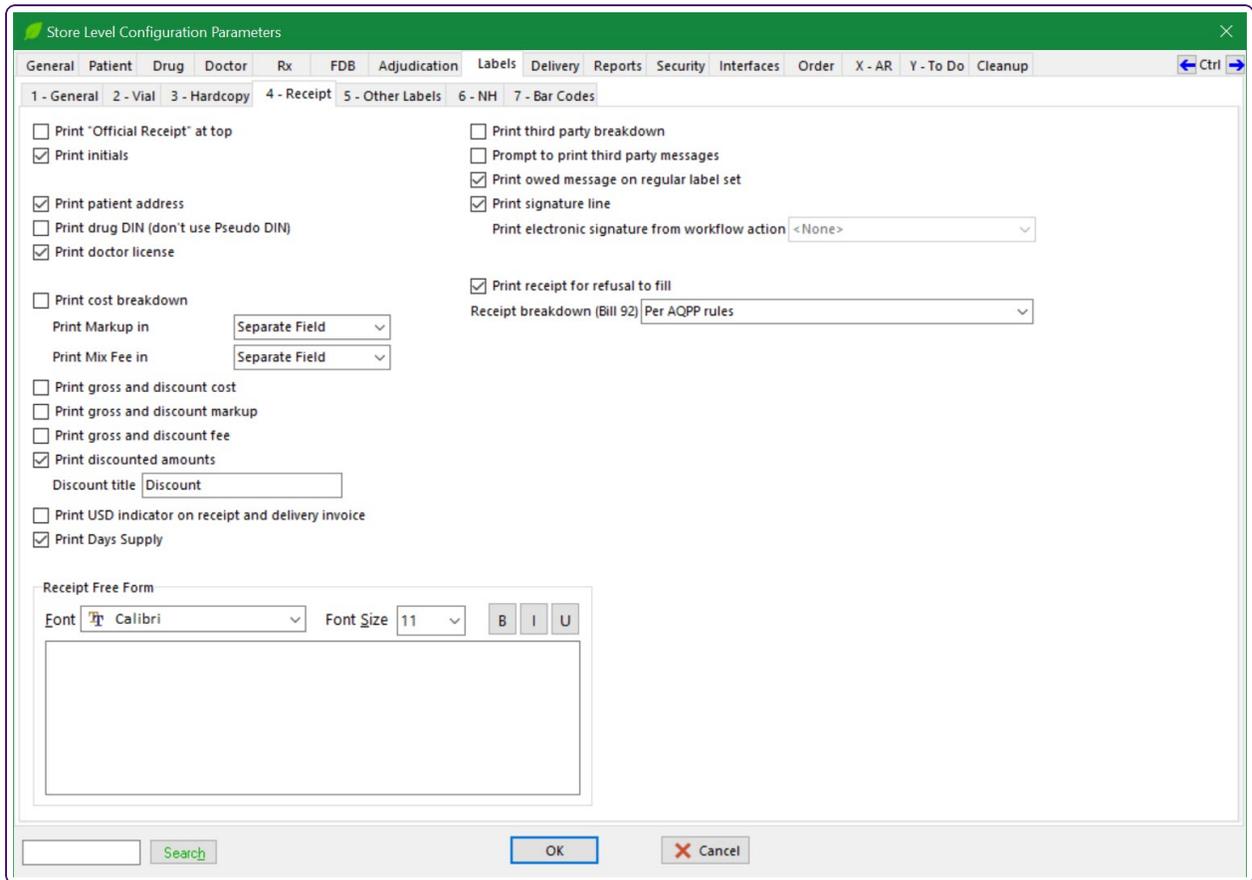


The following table describes the configuration settings on the **Labels > Hardcopy** tab.

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 Rx's 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



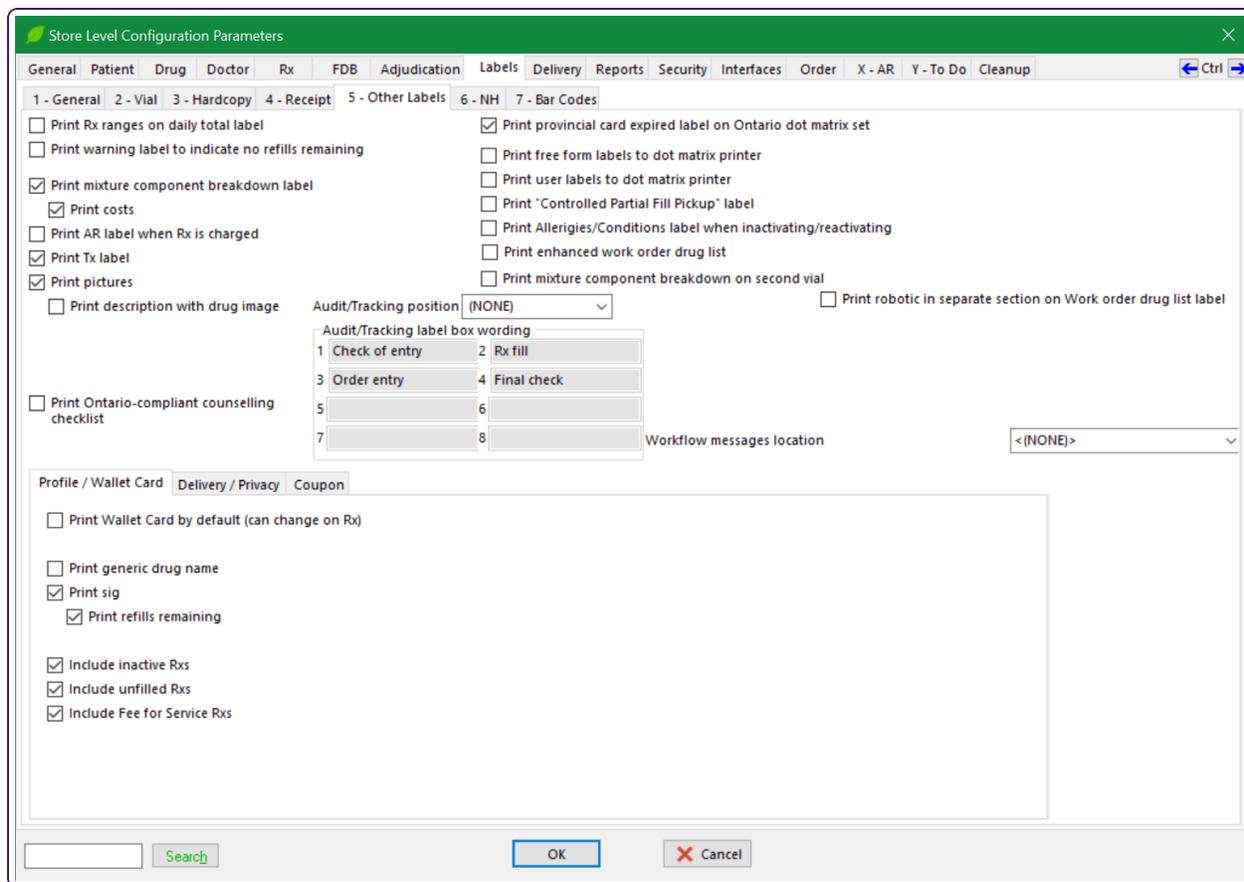
The following table describes the configuration settings on the **Labels > Receipt** tab.

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 Rx's.
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

Profile / Wallet Card Delivery / Privacy Coupon

Print Wallet Card by default (can change on Rx)

Print generic drug name

Print sig

Print refills remaining

Include inactive Rxs

Include unfilled Rxs

Include Fee for Service Rxs

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

Profile / Wallet Card **Delivery / Privacy** Coupon

Delivery

Use enhanced delivery label (Thermal only)

Always print delivery label

Print Rx number

Print phone number

Print co-pay

Print pending medication review notification

Print signature line

Position: Mailing label i

Privacy

Print phone number

Print patient pays

Print third party amount

Print pending medication review notification

Print signature line

Print patient email address

Print refrigerated product indicator

Position: (NONE)

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.

Profile / Wallet Card Delivery / Privacy **Coupon**

No image

X Offset: mm

Y Offset: mm

Width: mm

Height: mm

Print coupon

<p>New Rxs</p> <p>Value (% of Rx price) <input type="text" value="1"/></p> <p>Minimum value <input type="text" value="0.5"/></p> <p>Maximum value <input type="text" value="99.99"/></p>	<p>Refill Rxs</p> <p>Value (% of Rx price) <input type="text" value="1"/></p> <p>Minimum value <input type="text" value="0.5"/></p> <p>Maximum value <input type="text" value="99.99"/></p>
---	--

Include provincial plan

Override using plan settings based on

Expire after (days)

Message

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 screenshot shows the 'Store Level Configuration Parameters' dialog box with the 'Labels > NH' tab selected. The configuration options are as follows:

- Only print regular label set for NH Rxs if regular labels > 0
- Print receipt for NH Rxs when patient pays > 0
- Print receipt with Ontario Standard labels
- Print ManRex labels for unfilled Rxs
- Print pass times on ManRex labels
- Print Rx expiry on ManRex labels
- Always split quantity on Ontario Standard vials
- Use "NH Labels" to govern vial label count on NH Laser Label Style 1 & 2 (default is OFF)

The 'ManRex label header' area is currently empty.

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

The screenshot shows the 'Store Level Configuration Parameters' window with the '7 - Bar Codes' tab selected. The 'Bar code configuration' table is currently empty. The '2D Bar Coding' section has the following settings:

- Vial
- Hardcopy
- Receipt
- Counseling
- Owe Pick Up
- Narcotic Pick Up
- Authorization
- Rx Sync Consent
- Pharmacist Counseling

Additional settings at the bottom left:

- Print patient id bar code
- Print patient quick code
- Print linear bar code on left of vial
- Print script image bar code warning label

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 screenshot shows the 'Store Level Configuration Parameters' window with the 'Delivery' tab selected. The window contains several sections of configuration options:

- Print Delivery Order report:** A dropdown menu set to 'Always'.
- Print Delivery Invoice report:** A dropdown menu set to 'Only if > \$0.00'.
- Print credit card on Delivery Order report:** An unchecked checkbox.
- Print credit card on Delivery Invoice report:** A checked checkbox.
- Print drug information on Delivery Order report:** A checked checkbox.
- Print section Release Of Delivery Order on Delivery Order report:** An unchecked checkbox.
- Print section Delivery Of Order on Delivery Order report:** An unchecked checkbox.
- Print section Receipt of Delivery Order on Delivery Order report:** An unchecked checkbox.
- Print section ID Required on Delivery Order report:** An unchecked checkbox.
- Print store logo on delivery invoice:** An unchecked checkbox.
- Mark delivery order shipped on print:** An unchecked checkbox.
- Warn me if the address used in a delivery order is not valid:** An unchecked checkbox.
- Delivery order bar code:** A dropdown menu set to 'Delivery Order Number'.
- Delivery order export:** An unchecked checkbox.
- Delivery order export folder:** A text field with a 'Browse' button.
- Note:** It is recommended that a shared network folder is selected to keep all exported orders in one location.
- Delivery Order Export Fields:** A text field with an 'Edit' button.
- Default delivery charge \$:** A text field set to '0'.
- Retain completed delivery orders for:** A text field set to '0' months.
- Allow patients to receive deliveries without signature:** An unchecked checkbox.
- Require signature for orders with value greater than \$:** A text field set to '(blank = no max)'.
- Require signature for refrigerated products:** An unchecked checkbox.
- Require signature for delivery addresses in these provinces/territories:** A text field with an 'F2' button.
- Require signature for delivery addresses for these drug schedules:** A text field with an 'F2' button.
- Require lockbox to receive delivery without signature:** An unchecked checkbox.
- Acceptable penetration percentage:** A text field set to '100' %.
- Default waybill number for Store Delivery:** An unchecked checkbox.

At the bottom of the window, there is a search bar, an 'OK' button, and a 'Cancel' button.

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
<p>Require lockbox to receive delivery without signature and Acceptable penetration percentage</p>	<p>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.</p> <p>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.</p> <p>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 $\geq 95\%$ of the mailboxes are in lockboxes.</p>
<p>Default waybill number for Store Delivery</p>	<p>If selected, the default waybill number is used for store deliveries; otherwise, you can enter a waybill when completing the delivery order.</p>

Reports

The following section describes the configuration settings available on the **Reports** tab.

General

The screenshot shows the 'Store Level Configuration Parameters' dialog box with the 'Reports' tab selected and the 'General' sub-tab active. The configuration includes:

- Insert row breaks into reports
- Reports shading: 10 %
- Always show masked Credit Card Numbers
- IMS Report: Store ID (empty), Format: 256 byte
- Send scheduled report failure notifications to: (empty dropdown)
- Fax cover page disclaimer: Font: Calibri, Font Size: 11. The text reads: "Cette télécopie, y compris les pièces jointes est destiné à l'usage exclusif du destinataire ou bien de l'entité à laquelle elles sont adressées et contiennent des informations personnelles et confidentielles. Si vous n'êtes pas le destinataire prévu, toute révision non-autorisée, utilisation, copie ou distribution de cette télécopie est strictement défendu. Si vous avez reçu cette télécopie, y compris des pièces jointes par erreur, SVP contactez l'expéditeur immédiatement au numéro de téléphone indiqué ci-dessus et détruire toutes les copies du message original."
- NH:
 - Include canceled Rxs on MAR/TMR forms
 - Include canceled Rxs on compliance reports
 - Exclude full suspension period Rxs on MAR/TMR forms
- MAR/TMR: when patient has no allergies/conditions, print: Ask Patient
- Report headers date and time format:
 - Date Format: dd-mm-yyyy
 - Time Format: hh:nn:ss
- Prescription Authorization Request message: (empty text area)

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 screenshot shows the 'Store Level Configuration Parameters' window with the 'Reports > Kroll Care' tab selected. The 'Offsets' section has 'Left' set to 0 mm, 'Top (first page)' set to 0 mm, and 'Top (additional Pages)' set to 0 mm. The 'Base Font Size' is set to 10. The 'Automatic Kroll Care' section has several checkboxes: 'Print for Retail New Rxs' (checked), 'Only print if patient hasn't had the drug in the last 365 days' (checked), 'Print for Retail Refill Rxs' (unchecked), 'Print for NH New Rxs' (unchecked), 'Print for NH Refill Rxs' (unchecked), 'Print for Unit Dose New Rxs' (unchecked), 'Print for Unit Dose Refill Rxs' (unchecked), 'Print for Autofill New Rxs' (checked), and 'Print for Autofill Refill Rxs' (unchecked). At the bottom, 'Print opioid education sheet' is checked.

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.

Store Level Configuration Parameters

General Patient Drug Doctor Rx FDB Adjudication Labels Delivery Reports Security Interfaces Order X - AR Y - To Do Cleanup

Require Passwords

Regular Users **Manager Users**

Min password length

Min password age days

Force password change after days

Prevent usage of previously used passwords

Disable user after failed attempts (minimum of 3)

Disable user if dormant period exceeds days

Disable user if activation period exceeds days

Force password change for new user

Enforce complex passwords

Force the use of numbers in password

Force the use of symbols in password

Lock session after minutes

Terminate session minutes after locked session

Require User ID For Every Rx

Require Password After No Rx Activity in minutes

Allow Password Recovery With App

Allow sending public IP address to Pharmanet

Banner

Search

Logging

Log Rx reprints

Log Rx modifies

Log On Hand changes

Require user login

Only log for drug schedules F2 (blank logs all schedules)

Log AR modifications

Log AR deletions

Log if refill is % early or late (0 = do not log)

Log credit card access and changes

Log user information access and changes

Restrict and log running of reports for all patients

Log Vendor Socket Communications

Log handled exceptions

Always double count drug schedules F2

Double Count Acknowledgement

Notifications

Show notifications for pending updates on the Start screen

Only show to users who can run updates

Include updates that are effective in the future

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.

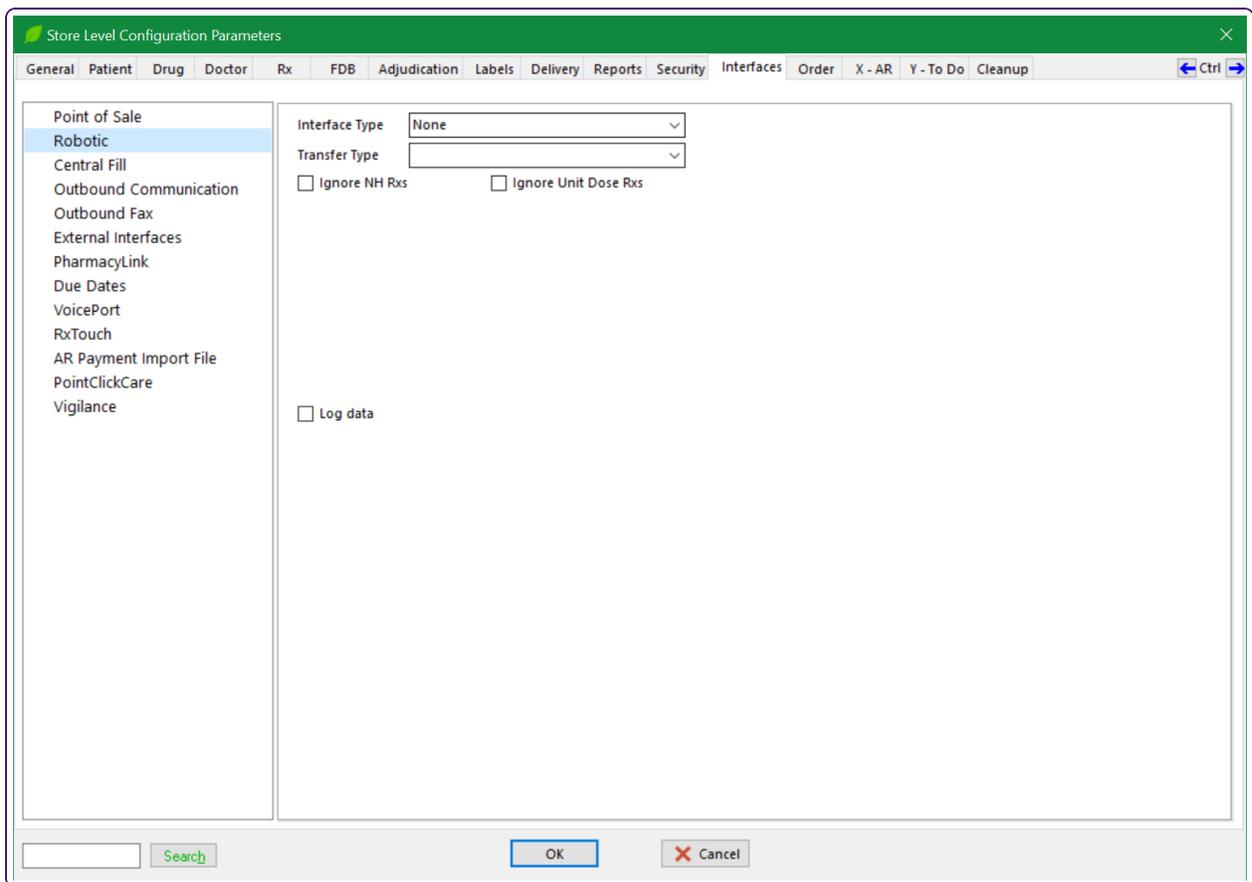
Name	Description
Only show to users who can run updates	If selected, notifications are only shown to users who can run updates.
Include updates that are effective in the future	If selected, notifications about future updates are included.

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 screenshot shows the 'Store Level Configuration Parameters' dialog box with the 'Interfaces' tab selected. The 'Central Fill' option is highlighted in the left-hand navigation pane. The main area is divided into three sections:

- Rx options:**
 - Request counselling
 - Request Rx receipt
 - Allow backorders
- Order options:**
 - Prevent order if Rxs need verification
 - Prevent order if not billed
 - Request invoice
 - Request packing slip
 - Dynamically create orders when filling Rxs
 - Prompt to Send Now
 - Default destination: <None>
 - Prompt For CF refusal reason
 - Prompt For CF patient consent if unknown
 - CF requires patient consent
 - CF requires guardian consent for patients under age: N/A
 - Pre-qualify nursing home Rxs for remote packagers
 - Send to CF when batching (if previously sent)
 - Prompt to update CF order status before receiving
- Override default timeouts:**
 - Connection timeout: 5 secs
 - Send timeout: 30 secs
 - Receive timeout: 30 secs

At the bottom of the dialog, there is a search field, an 'OK' button, and a 'Cancel' button.

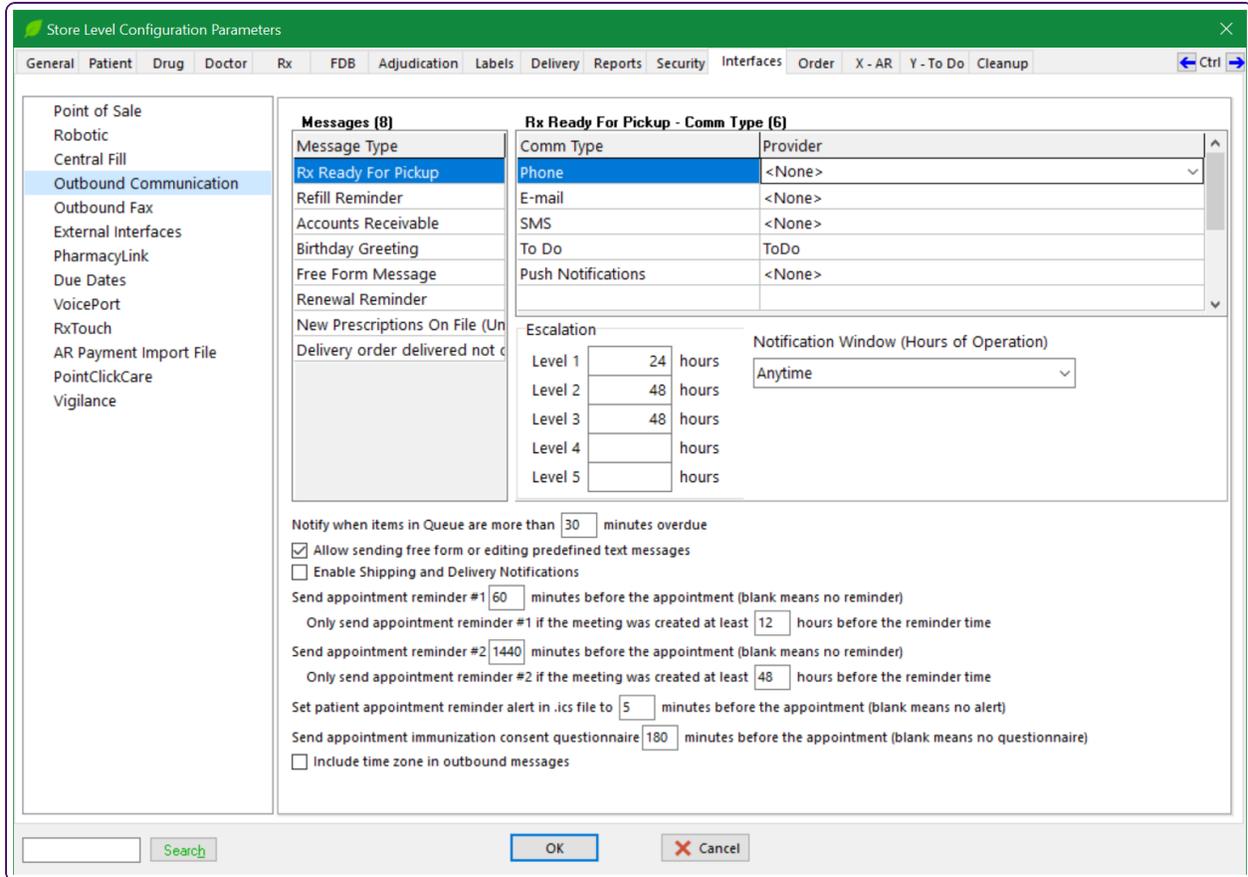
The following table describes the configuration settings on the **Interfaces** tab when **Central Fill** is selected.

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.



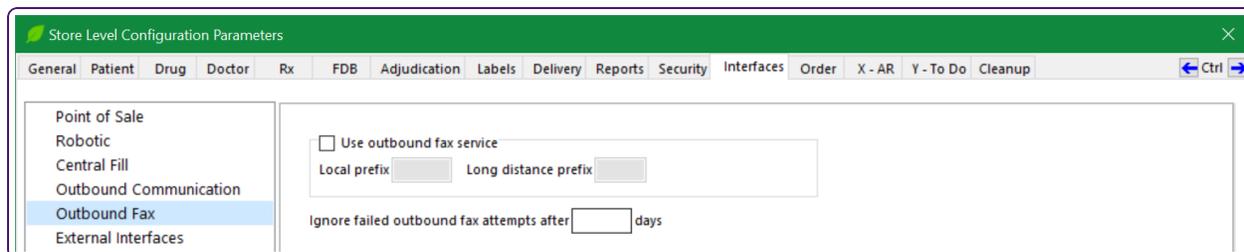
The following table describes the configuration settings on the **Interfaces** tab when **Outbound Communication** is selected.

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.

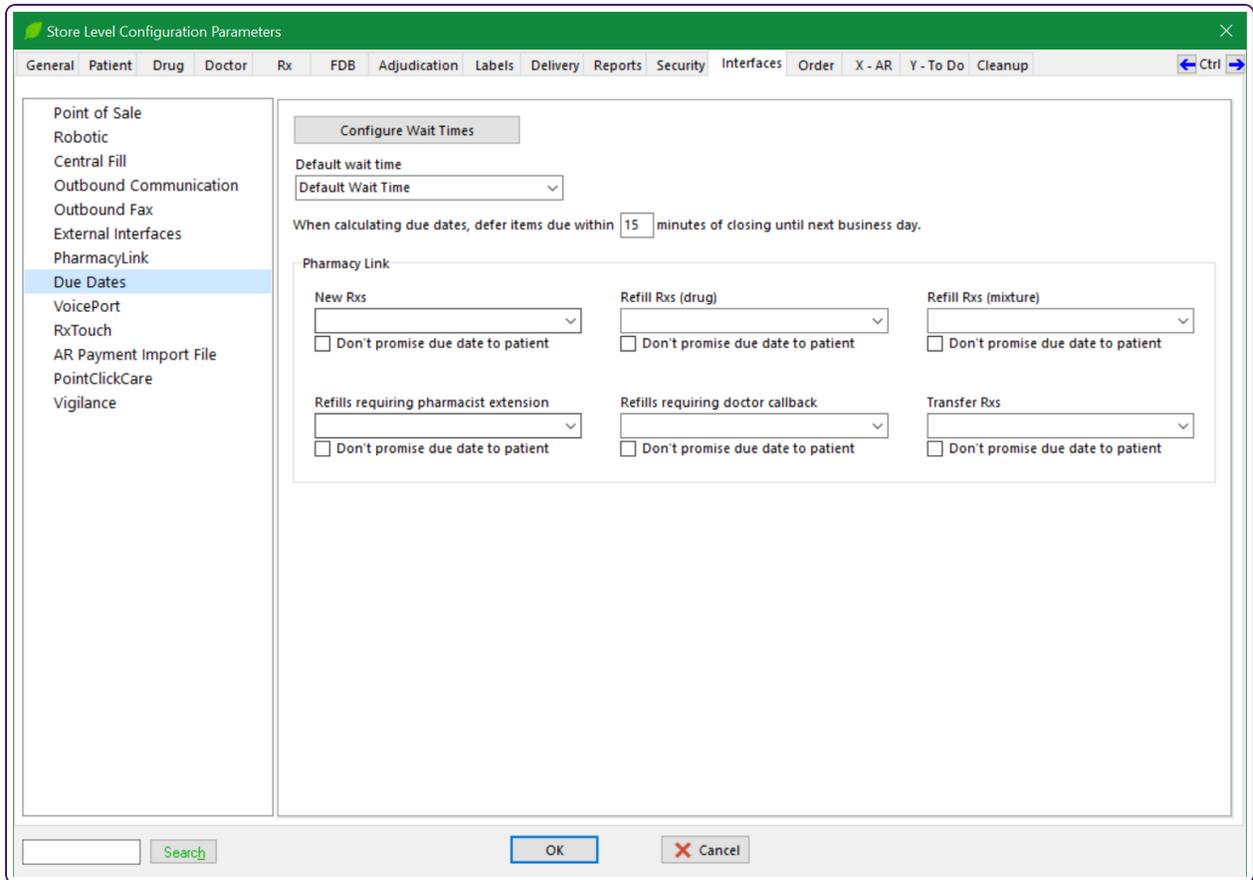
External Interfaces

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.

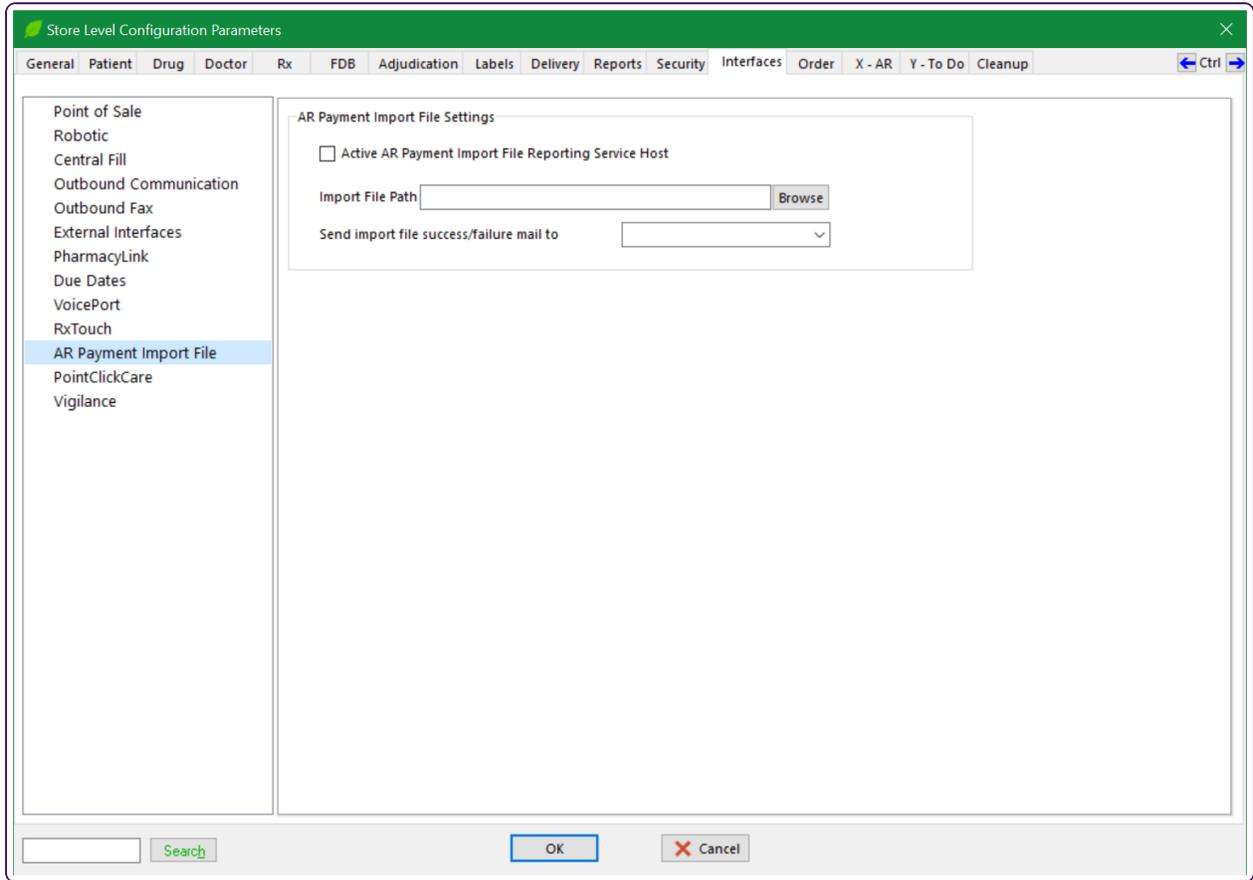
Name	Description
Configure Wait Times	Select this button to define the wait times used by the fields on this tab.
Default wait time	The wait time that is used if a specific wait time is not set for an item.
When calculating due dates, defer items within [x] minutes of closing until next business day	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.

The screenshot shows a software window titled "Store Level Configuration Parameters" with a green header bar. The window contains a tabbed interface with the following tabs: General, Patient, Drug, Doctor, Rx, FDB, Adjudication, Labels, Delivery, Reports, Security, Interfaces, Order, X - AR, Y - To Do, and Cleanup. The "Rx" tab is currently selected. On the left side of the "Rx" tab, there is a vertical list of configuration categories: Point of Sale, Robotic, Central Fill, Outbound Communication, Outbound Fax, External Interfaces, PharmacyLink, Due Dates, VoicePort, RxTouch (highlighted in blue), AR Payment Import File, PointClickCare, and Vigilance. The main area of the window displays the "RxTouch" configuration settings, which include four input fields: "User name" (empty), "Password" (containing the text "Not Set"), "Company Id" (containing the text "KWINQC"), and "URL (blank for default)" (empty). At the bottom of the window, there is a search bar with a "Search" button, and two buttons labeled "OK" and "Cancel".

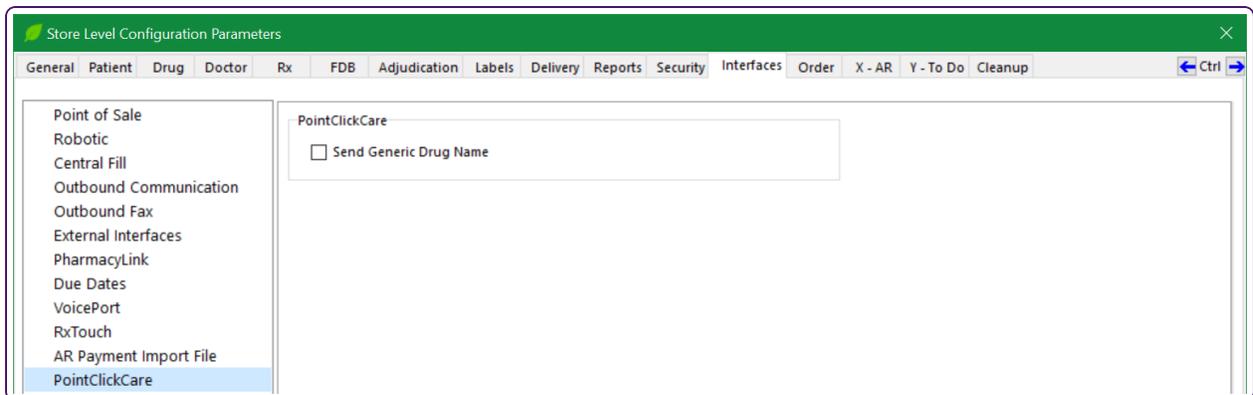
AR Payment Import File



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.

Store Level Configuration Parameters

General Patient Drug Doctor Rx FDB Adjudication Labels Delivery Reports Security Interfaces **Order** X - AR Y - To Do Cleanup

Perform Inventory Adjustment

Enable automatic drug ordering Allow min/max update

Default Ordering

Base ordering on Base minimum scripts on

Allow "Base Ordering On" Override at Drug Pack level

Auto increment PO numbers Next PO number

Allow order grouping Allow non-PO receive

Create order grouping when receiving a substituted item Average drug's acquisition cost upon receiving new inventory

Do NOT prompt to link items Allow default vendors for specific drug packs

Prompt for untransmitted purchase orders when closing Kroll For shared DB, order only for current store

Warn if item order price >= \$

Warn when ordering from another vendor if item is available from primary vendor

Base reorder on the inventory of the primary product.

Primary vendor

Secondary vendor

of days to base average usage calculations on (must be integer greater than zero)

Show warning if unresolved purchase order greater than days (zero = do not show warning)

Force inventory adjustment on all drugs

Search

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.

The screenshot shows the 'Store Level Configuration Parameters' dialog box with the 'X - AR' tab selected. The dialog is divided into three sections: '1 - General', '2 - Statements', and '3 - General Ledger'. The '1 - General' section contains various settings for charging and printing. The '2 - Statements' section is currently active and contains address-related settings. The '3 - General Ledger' section is partially visible at the bottom.

1 - General

- Charge Rx's: Automatically
- Add charges to: Same Day Or New Invoice
- Monthly finance charge: 0 %
- Only charge when balance greater than \$: 0
- Default tax levels:
 - For Rx's: None
 - For Rx's for Animals: None
 - For manual charges: None
- Print Credit Card On Invoice
- Print store logo on AR reports
- Print CHARGED or NOT CHARGED on receipts for patients with AR account
- Roll back the copay amount when AR Detail is deleted
 - Prompt user to perform the roll back
- Show cost and fee on AR Activity Report
- Allow charging \$0.00 Rx's to AR
- Account and invoice numbers:
 - Next account number: [Redacted] F2
 - Next invoice number: [Redacted] F2
 - Account number prefix: [Empty]
 - Pad account number to at least 0 digits
 - Always auto-generate account numbers
- Enable employee discount
- Configure Discount: [Button]

2 - Statements

- Use return address
- Store Name: [Empty]
- Address 1: [Empty]
- Address 2: [Empty]
- City: [Empty] Prov: [Empty] Postal: [Empty]
- Phone: [Empty] Fax: [Empty]
- Phone 2: [Empty] Fax 2: [Empty]
- Email: [Empty]
- Use return address for "From" address

3 - General Ledger

- PharmacyLink network for credit card integration: [Empty]
- PharmacyLink network for AR (Statement, Invoice, Payment): [Empty]

Buttons: Search, OK, Cancel

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

More ...

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

More ...

Configuration de la transmission

Hôtes Routes Noeuds Modems Transfert des champs CPHA Fermer

Hôtes de transmission (80) F2 Ins Sup

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		

Plus ...

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.

Name	Node Type	Phone	Is Down
Saskatchewan Health Insurance Network	SPDP		False
Pacific Blue Cross (Testbed)	TCP		False
Emergis Dialup	Dialup	1-866-448-4403	False
Bigstone	TCP		False
Newfoundland CeRx	TCP		False
Alberta Blue Cross Dialup	Dialup	1-877-777-0038	False
RxNet	TCP		False
Emergis TLS	TCP		False
NLPDP-TCP	TCP		False
BC Pharmanet	TCP		False
Pacific Blue Cross	TCP		False
Manitoba Blue Cross Dialup	Dialup	1-888-628-2703	False
Manitoba DPIN Direct	Direct		False
Manitoba Blue Cross TLS	TCP		False
PHIP (Old)	Dialup	19023686704	False
Saskatchewan Health Insurance Network	SPDP		False
RAMQ	TCP		False
Saskatchewan CeRx	TCP		False
NLPDP-Dialup	Dialup	18669909196	False
Emergis Dialup (Testbed)	Dialup	1-866-204-0109	False
Alberta Blue Cross TLS	TCP		False
PEI (CeRx)	TCP		False
BC Pharmanet (Testbed)	TCP		False
PEI (CeRx) Testbed	TCP		False
Newfoundland CeRx (Testbed)	TCP		False

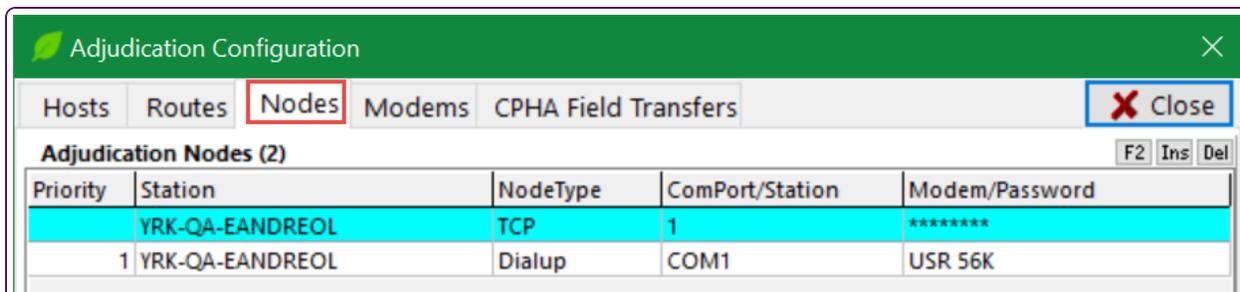
The following table describes the fields on this tab and the popup that is displayed when you enter or edit a route.

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.

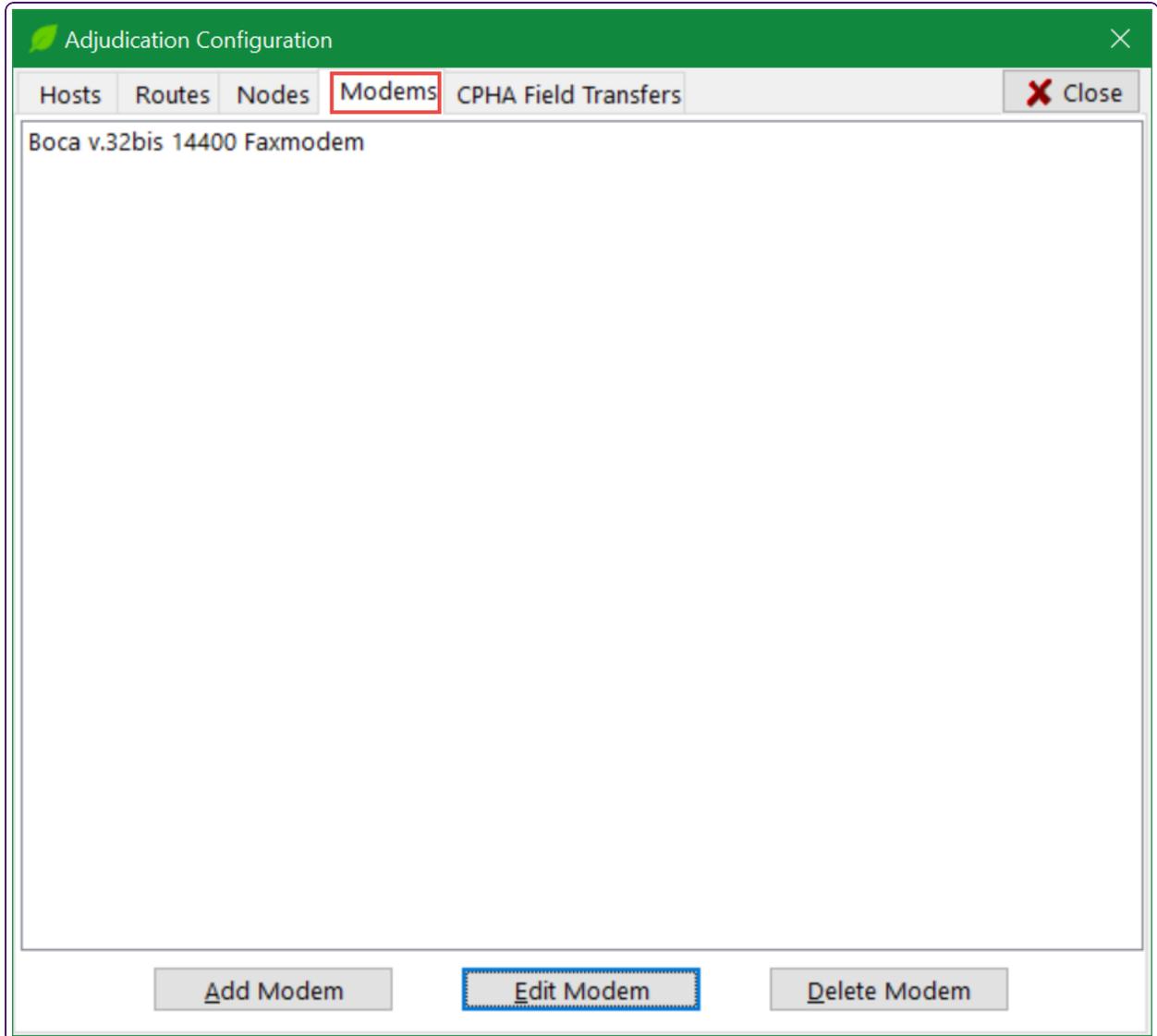


The following table describes the fields on this tab and the popup that is displayed when you enter or edit a node.

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.



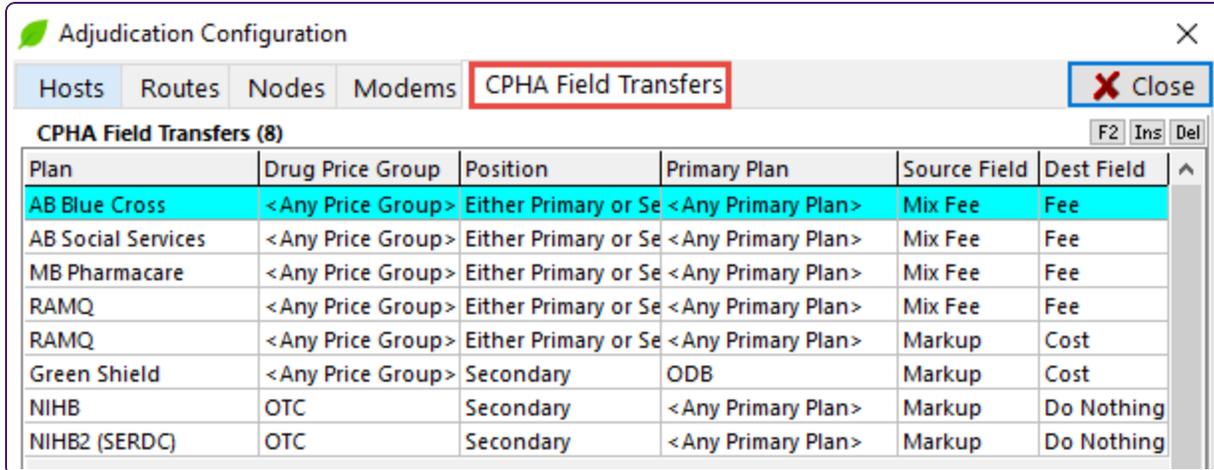
Use the **Add Modem**, **Edit Modem**, and **Delete Modem** to manage the list of modems.

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

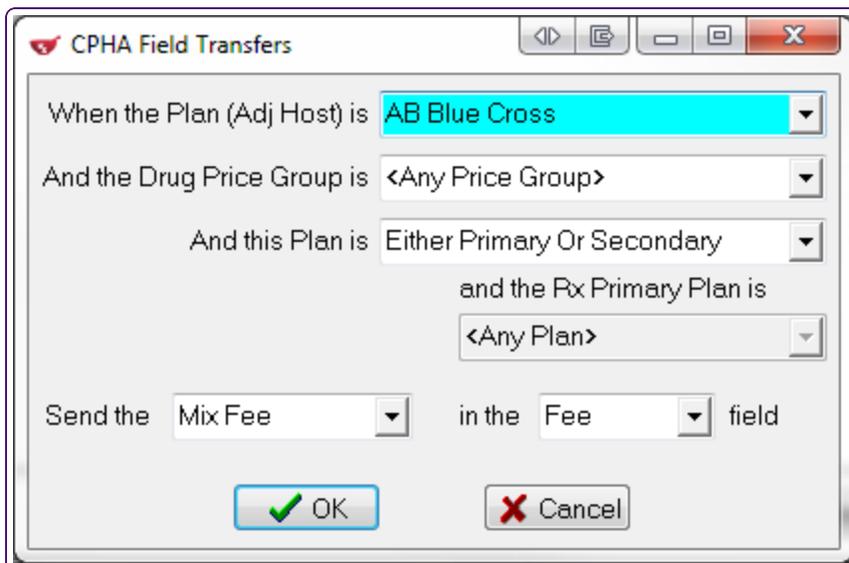
The **CPHA Field Transfers** tab determines what type of information is sent when an Rx is sent for adjudication, and in which fields.



Plan	Drug Price Group	Position	Primary Plan	Source Field	Dest Field
AB Blue Cross	<Any Price Group>	Either Primary or Se	<Any Primary Plan>	Mix Fee	Fee
AB Social Services	<Any Price Group>	Either Primary or Se	<Any Primary Plan>	Mix Fee	Fee
MB Pharmacare	<Any Price Group>	Either Primary or Se	<Any Primary Plan>	Mix Fee	Fee
RAMQ	<Any Price Group>	Either Primary or Se	<Any Primary Plan>	Mix Fee	Fee
RAMQ	<Any Price Group>	Either Primary or Se	<Any Primary Plan>	Markup	Cost
Green Shield	<Any Price Group>	Secondary	ODB	Markup	Cost
NIHB	OTC	Secondary	<Any Primary Plan>	Markup	Do Nothing
NIHB2 (SERDC)	OTC	Secondary	<Any Primary Plan>	Markup	Do Nothing

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.



When the Plan (Adj Host) is **AB Blue Cross**

And the Drug Price Group is **<Any Price Group>**

And this Plan is **Either Primary Or Secondary**

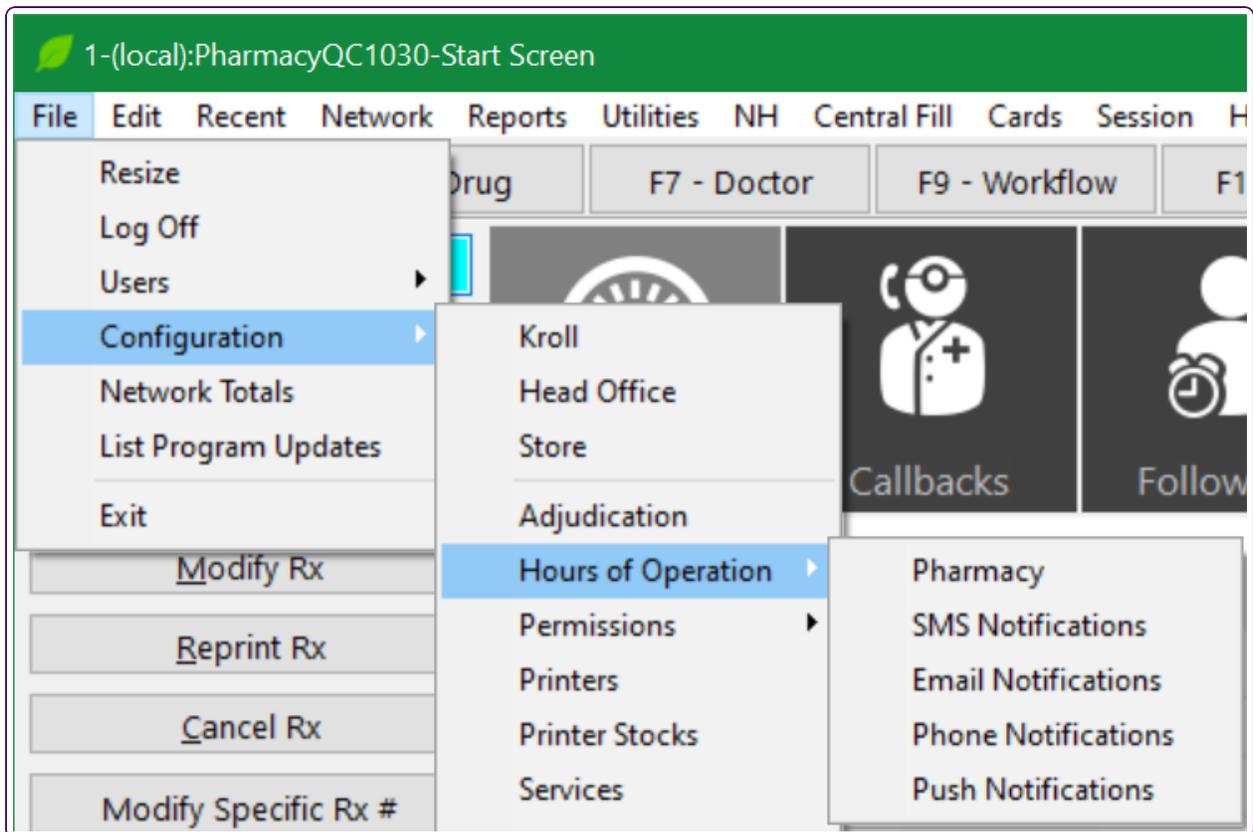
and the Rx Primary Plan is **<Any Plan>**

Send the **Mix Fee** in the **Fee** field

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.

Pharmacy Hours of Operation

Normal Hours of Operation

Sunday	Closed				
Monday	Open	09:00	to	05:00	Next Day
Tuesday	Open	09:00	to	05:00	Next Day
Wednesday	Open	09:00	to	05:00	Next Day
Thursday	Open	09:00	to	05:00	Next Day
Friday	Open	09:00	to	05:00	Next Day
Saturday	Open 24 Hours				

Holiday Hours (1) F2 Ins Del

Date	Open/Closed	Open	Close	Comment
25/12/2024	Closed			

OK Cancel

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.

SMS Notifications Time Windows

Normal Hours of Operation

Sunday	Never	▼
Monday	Anytime	▼
Tuesday	Anytime	▼
Wednesday	Anytime	▼
Thursday	Anytime	▼
Friday	Anytime	▼
Saturday	Time Window	▼

08:00 to 12:00

Holiday Hours (1) F2 Ins Del

Date	Time Frame	Start	End	Comment	▲
25/12/2024	Never				

OK Cancel

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.

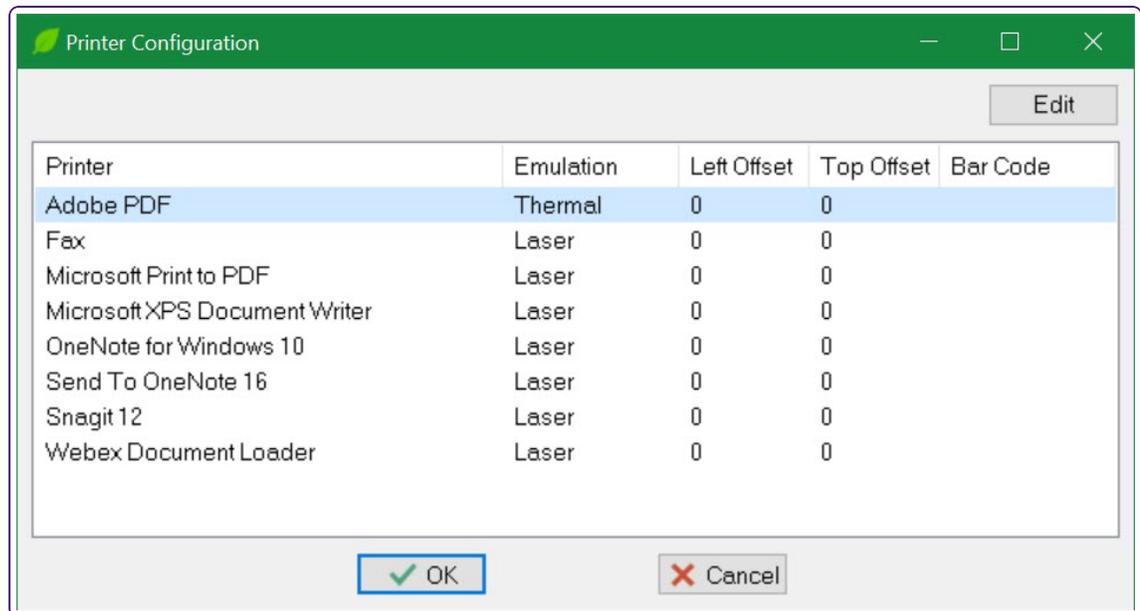
Name	If selected, users in this group can...
Change Plans	Access the Plans tab on the Plans/Pricing window.
Change Pricing	Access the Strategies, Strategy Exceptions, Drug Price Groups, Patient Price Groups, and Copay tabs on the Plans/Pricing window.
Change Master Lists	Access the menus in the Master 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**.

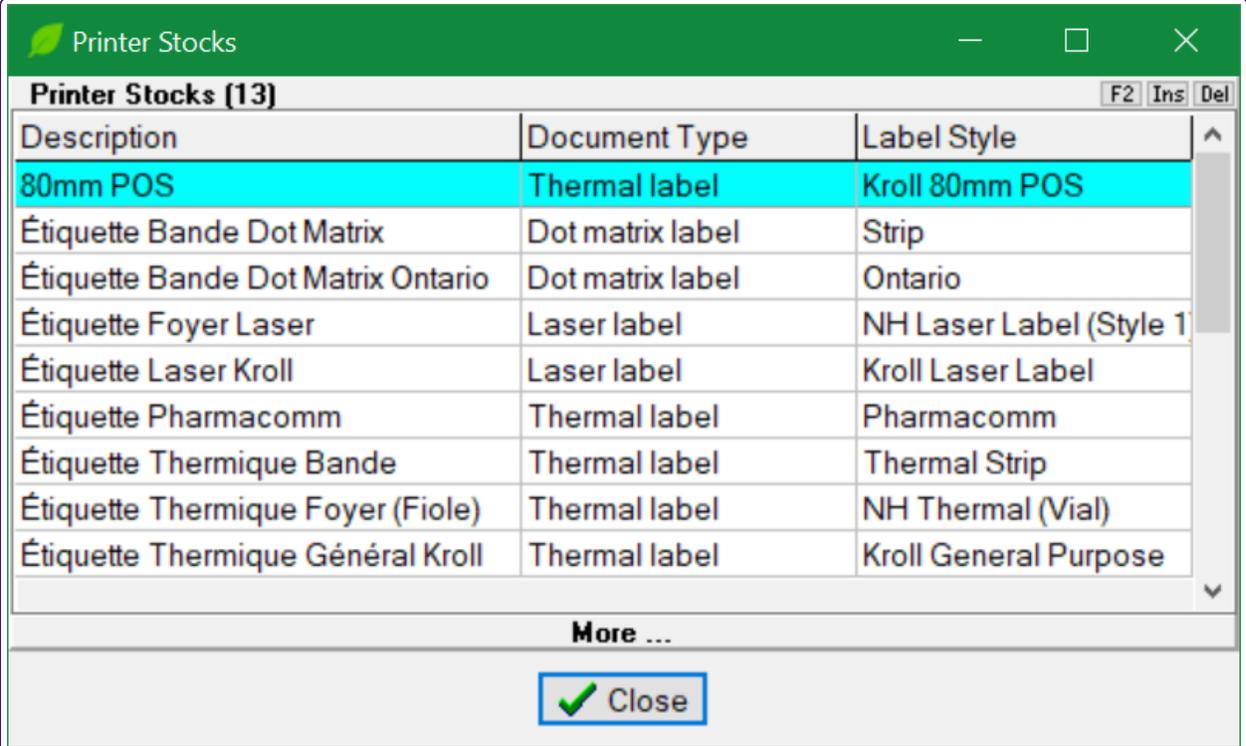
The **Edit Printer Settings** window is displayed.

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 screenshot shows a window titled 'Printer Stocks' with a table containing 13 entries. The first entry is highlighted in cyan. Below the table is a 'More ...' button and a 'Close' button with a green checkmark.

Description	Document Type	Label Style
80mm POS	Thermal label	Kroll 80mm POS
Étiquette Bande Dot Matrix	Dot matrix label	Strip
Étiquette Bande Dot Matrix Ontario	Dot matrix label	Ontario
Étiquette Foyer Laser	Laser label	NH Laser Label (Style 1)
Étiquette Laser Kroll	Laser label	Kroll Laser Label
Étiquette Pharmacomm	Thermal label	Pharmacomm
Étiquette Thermique Bande	Thermal label	Thermal Strip
Étiquette Thermique Foyer (Fiole)	Thermal label	NH Thermal (Vial)
Étiquette Thermique Général Kroll	Thermal label	Kroll General Purpose

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**.

The screenshot shows a 'Services Configuration' dialog box with the following configuration details:

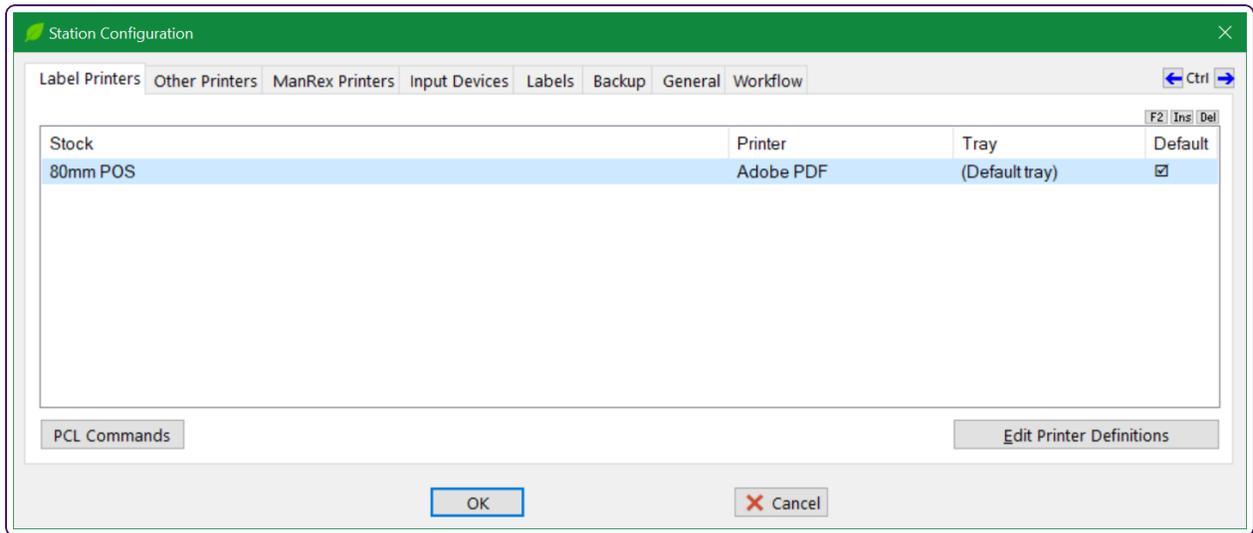
Service Name	Host	Port	Default Port	Additional Options
Kroll Messaging Service	localhost	38311	38311	
Reporting Service Client	localhost	38318	38318	
Robotic Interface Service	localhost	38313	38313	
IVR Service	localhost	38315	38315	
Adjudication Service	localhost	38312	38312	
POS Service	localhost	38317	38317	
Background Rx Service	localhost	38316	38316	<input type="checkbox"/> Enable Background Rx Processing
PharmacyLink Service	localhost	38319	38319	
Update Service	localhost	38314	38314	

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**.

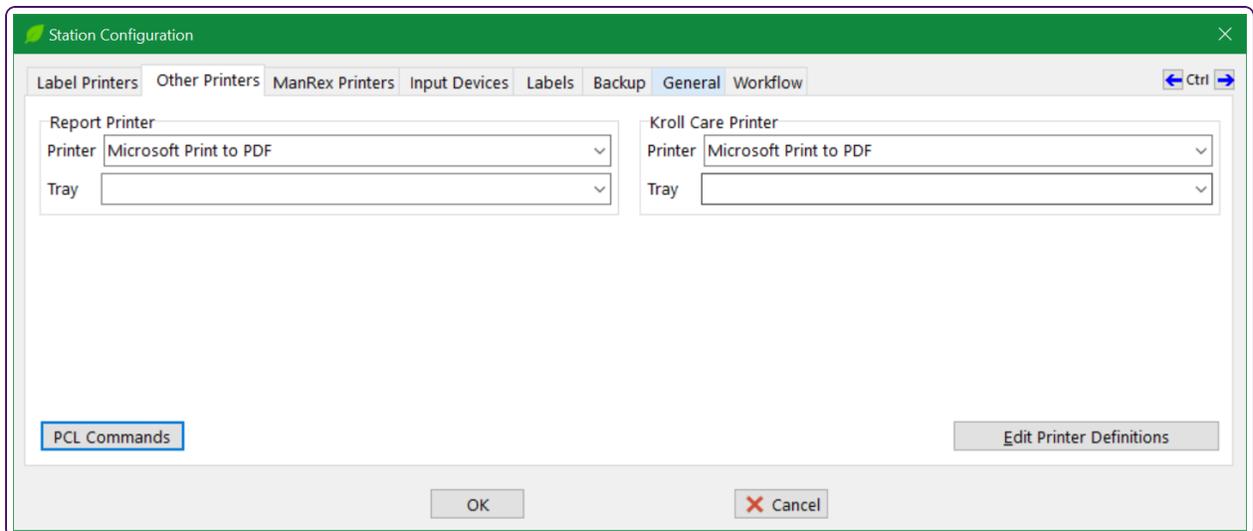
Label Printers



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.

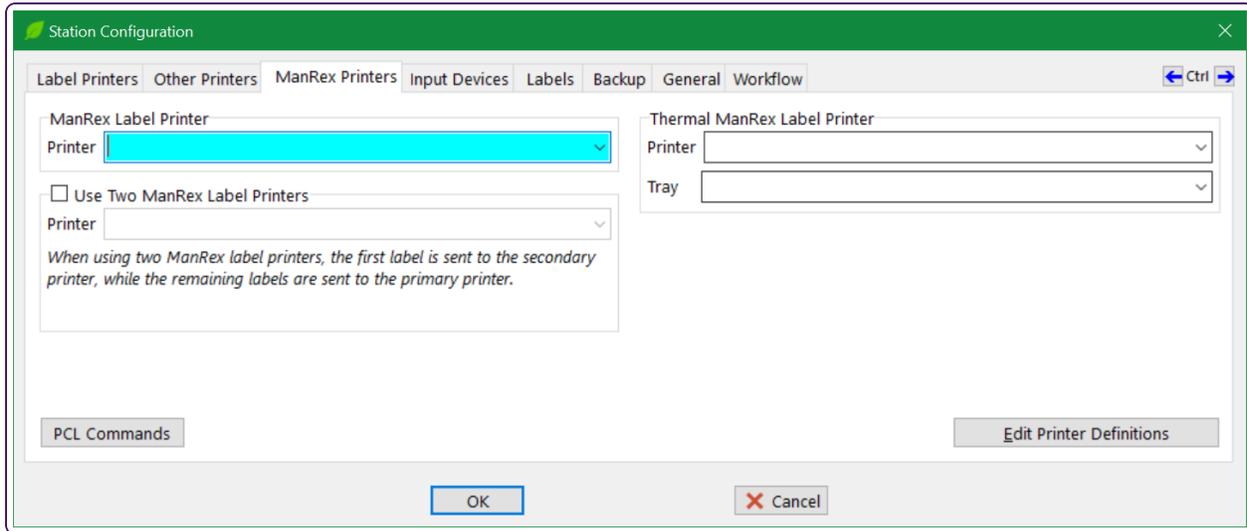
Other printers



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.

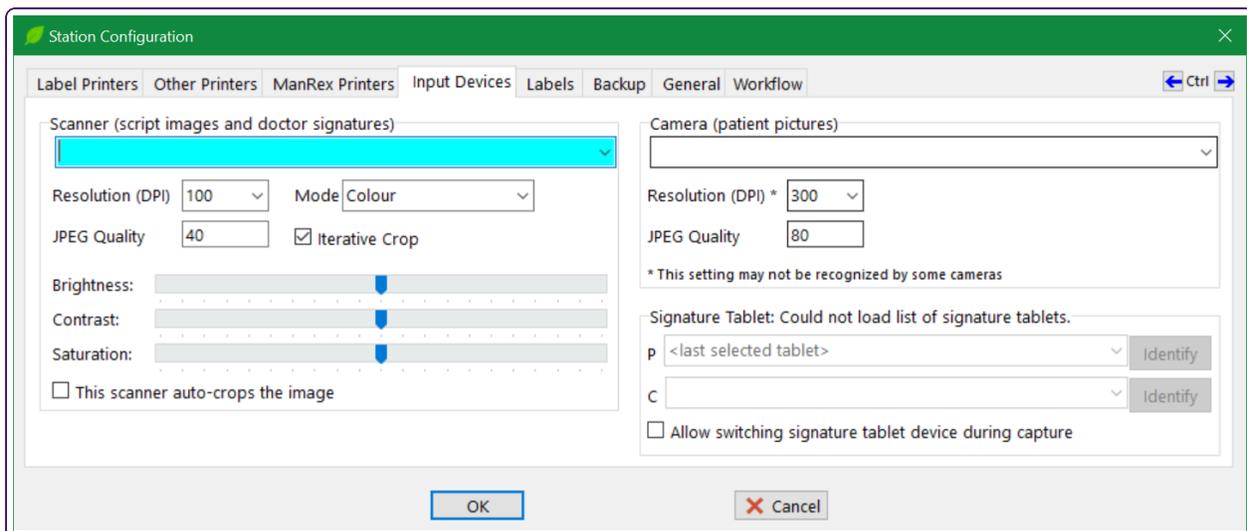
ManRex Printers



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**.

Station Configuration

Label Printers | Other Printers | ManRex Printers | Input Devices | **Labels** | Backup | General | Workflow

Label Header

Font: Font Size:

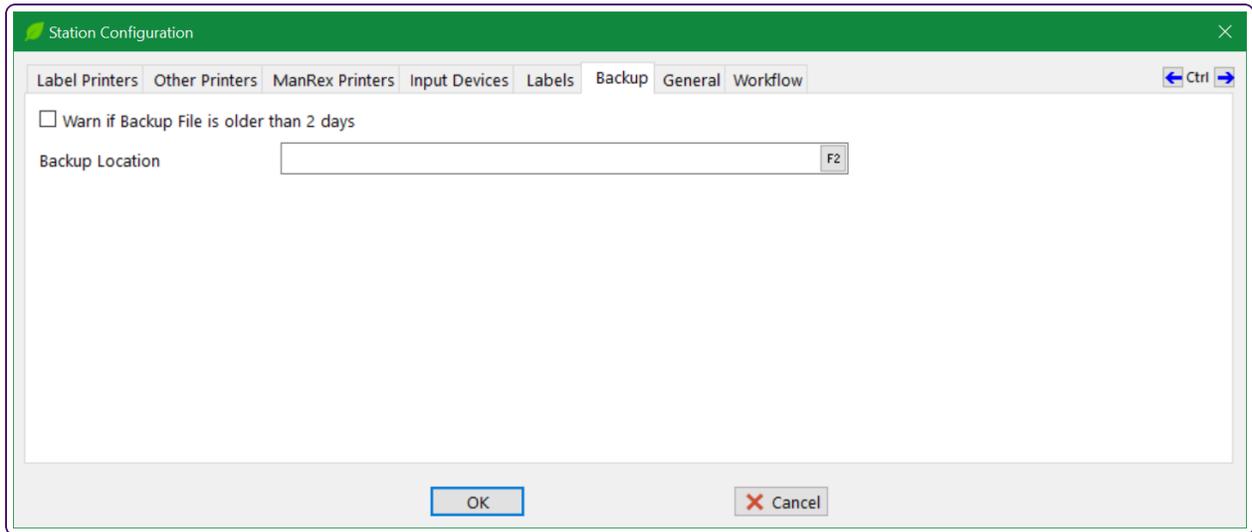
Logo

None Store logo Pre-printed, width: mm

*** If this header setting is left empty, the store header setting will be used instead. ***

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.

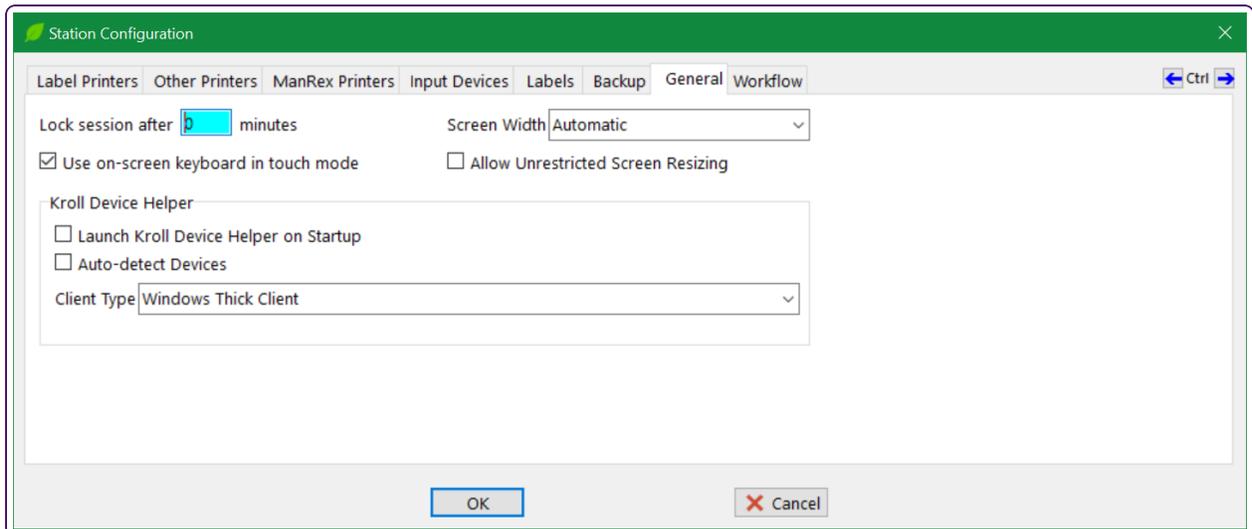
Backup



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.

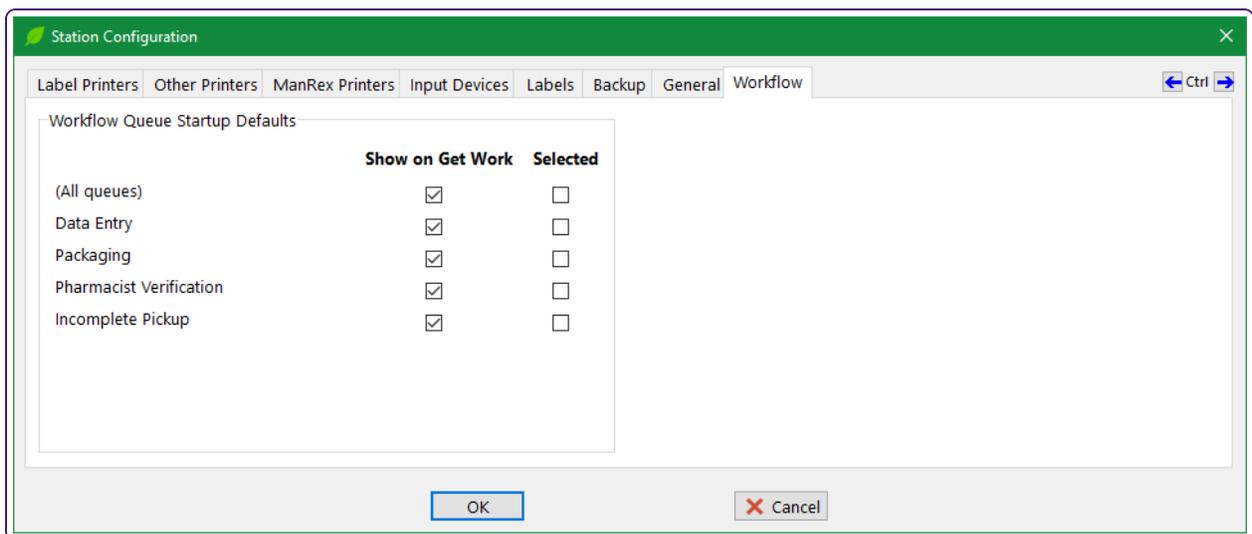
General



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	<p>The current environment:</p> <ul style="list-style-type: none"> ■ 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.

© 2025 TELUS

TELUS is a registered trademark of TELUS Corporation and is used under license. All other trademarks are the property of their respective owners.

