

# Appointment Calendars

January 2020

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## Appointment Calendar

The Appointment Calendar is a tool that helps pharmacies manage and organize patient appointments within the Kroll application. Appointments can be made for a wide variety of service such as Flu Shots, Immunizations, and Medication Reviews, and can also be used to coordinate staff activities such as shifts, break times, and vacation.

You must have Kroll V10 SP9 or higher to use this functionality.

### Calendar Screen Explained

The Appointment Calendar is accessed by selecting the **Calendar** tile from the **Alt+X - Start** screen. The tile count indicates the number of remaining appointments scheduled for today.

The screenshot shows the Kroll Dispensary software interface. The top menu bar includes File, Edit, Recent, Reports, Utilities, NH, Central Fill, Cards, Session, and Help. Below the menu bar are tabs for F3 - Patient, F5 - Drug, F7 - Doctor, F9 - Workflow, F11 - Drop-off, F12 - New Rx, and Alt+X - Start. The main toolbar contains several function tiles: Dashboard (106), Callbacks (5), Followups, Notes (1), Inbound Docs (3), Outbound Fax, Mail, and Calendar (3). The Calendar tile is highlighted with a red box. Below the toolbar, the 'Rx Work in Progress' section displays a table of overdue and in-progress prescriptions. To the right, the 'Rx Counts' section shows the number of new, repeat, and total prescriptions. The bottom of the screen features the Kroll Dispensary logo and the tagline 'TECHNOLOGY DRIVEN... ...PHARMACY FOCUSED'.

	Overdue	0-1 hrs	1-4 hrs	4+ hrs	Tomorrow	Trouble	Total
Rx's To Do	85	0	0	0	0	0	85
Rx's In Progress	21	0	0	0	0	0	21

Rx Counts	
New Rxs	0
Repeat Rxs	0
Total Rxs	0

## Calendars

Each configured calendar will appear in the bottom left corner of the **Calendar** screen. Place a checkmark next to the calendars whose appointments you want to view. If **Combined** is not enabled, a column for each selected calendar will display.

The screenshot displays the Appointment Calendar interface for December 2016. At the top right, there is a 'Combined' checkbox which is checked, along with buttons for 'New', 'Today', and 'Month view'. The main area shows four calendar columns: 'Calendar' (pink), 'Kroll Pharmacy' (blue), 'Pharmacist A' (teal), and 'Pharmacist B' (green). Each column displays a weekly grid with dates and appointment names. A 'Calendars' list in the bottom left corner shows checkboxes for 'Calendar', 'Kroll Pharmacy', 'Pharmacist A', and 'Pharmacist B', all of which are checked. The 'Calendar' checkbox is highlighted with a red box.

Calendar	Mon	Tue	Wed	Thu	Fri	Sat	Sun
Calendar				Gén		Hux	
Kroll Pharmacy				Gén			
Pharmacist A				Gén			
Pharmacist B				Gén			

If **Combined** is enabled, the **Calendar** screen will display all scheduled appointments associated with each selected calendar.

<b>106</b> Dashboard	<b>5</b> Callbacks	 Followups	<b>1</b> Notes	<b>3</b> Inbound Docs	 Outbound Fax	 Mail	<b>3</b> Calendar
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December 2016  Combined   Month view

November, 2016	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Nov 28	Nov 29	Nov 30	Dec 1	Dec 2	Dec 3	Dec 4	Dec 5
45 31 1 2 3 4 5 6 46 7 8 9 10 11 12 13 47 14 15 16 17 18 19 20 48 21 22 23 24 25 26 27 49 28 29 30				Géroux, Amélie [In] Doe, Jane [General]		Huxley, Aldous [Gk]	
December, 2016	5	6	7	8	9	10	11
M T W T F S S 49 50 1 2 3 4 51 5 6 7 8 9 10 11 52 12 13 14 15 16 17 18 53 19 20 21 22 23 24 25 54 26 27 28 29 30 31 1 55 2 3 4 5 6 7 8		Kim, Test [Immuni]	Patient, Test [Travi] Doe, Jane [General]	Taylor, Barbara [In] [Smoking Cessatic]	Orwell, George [Sn] 8:00am [Vacation]		
	12	13	14	15	16	17	18
			Patient, Test [Imm]	[General Consultation]			
	19	20	21	22	23	24	25
		[General Consultat]					
	26	27	28	29	30	31	January, 1

Calendars

- Calendar
- Kroll Pharmacy
- Pharmacist A
- Pharmacist B
- Scheduled Breaks
- Vacation

## Date Views

The dropdown menu in the top right corner of the **Calendar** screen allows you to select a **Month view**, **Week view**, or **Day View**. In each view, you can use the arrow buttons in the top left corner of the screen to select a different month, week, or day.

### Month view:

December 2016

Combined New Today **Month view**

Calendar	Kroll Pharmacy	Pharmacist A	Pharmacist B
Nov 29, Dec 1 (Gén, Doe), Dec 2 (Hux), Dec 5 (Kim), Dec 6 (Doe), Dec 7 (Tay), Dec 8 (Gén), Dec 12 (Pati), Dec 14 (Rotl), Dec 19 (Gér)	Nov 29, Dec 1 (Gén), Dec 7 (Mct), Dec 8 (Hux), Dec 14 (Vax), Dec 21 (Vax), Dec 28 (Vax)	Nov 29, Dec 1 (Gén), Dec 7 (Pati), Dec 8 (Orw), Dec 14 (Vax), Dec 21 (Vax), Dec 28 (Vax)	Nov 29, Dec 1 (Gén), Dec 7 (Pati), Dec 8 (General), Dec 14 (Vax), Dec 21 (Vax), Dec 28 (Vax)

Calendars:  Calendar,  Kroll Pharmacy,  Pharmacist A,  Pharmacist B,  Scheduled Breaks,  Vacation

### Week view:

December 5-11, 2016

Combined New Today **Week view**

Calendar	Kroll Pharmacy	Pharmacist A	Pharmacist B
Dec 05 (Taylor, Barbara, Smoking Cess, Patient, Test [C]), Dec 06 (Kim, Test [Imm]), Dec 07 (Doe, Jane [Gén], Géroux, Amélie), Dec 08 (Huxley, Aldous)	Dec 06 (8:00am [Vacatior]), Dec 07 (McCarthy, Cor), Dec 08 (8:00am [Vacatior]), Dec 11 (8:00am [Vacatior])	Dec 06 (Orwel, George, 8:00am [Vacatior]), Dec 07 (Patient, Test [I], Orwel, George), Dec 11 (8:00am [Vacatior])	Dec 06 (8:00am [Vacatior]), Dec 07 (Patient, Test [I]), Dec 11 (8:00am [Vacatior])

Calendars:  Calendar,  Kroll Pharmacy,  Pharmacist A,  Pharmacist B,  Scheduled Breaks,  Vacation

Day view:

If you click the **Today** button, the Calendar will highlight today's date in each displayed calendar:

## Virtual Consultation Appointments

This section explains how to create, modify, and delete virtual consultation appointments, and how to launch scheduled services directly from the Calendar.

### Configuration

A Kroll representative must provision the section of **File > Configuration > Store > Interfaces > Pharmacy Link** and enable all of the options shown in the below.

Store Level Configuration Parameters

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

Point of Sale  
 Robotic  
 Central Fill  
 Outbound Communication  
 Outbound Fax  
 External Interfaces  
**Pharmacy Link**  
 VoicePort  
 CanadaPost  
 RxTouch  
 PointClickCare

Narcotic Drug Schedules  
 G (Controlled): N (Narcotics) F2

Combine Call Doctor Callback status  
 Allow Pharmacist Extension for Refilling Regular Rxs with no Refills left  
 Allow Call Doctor for Regular Rxs with no Refills left  
 Allow Call Doctor for Narcotic Rxs with no Refills left  
 Allow Care Giver Registration  
 Allow patients to submit photos of new prescriptions using Web or Mobile app.  
 Allow patients to self-register

Auto generate PharmacyLink patient registration document for Network  
 Patient registration pairing codes expire after 7 days

Due Dates  
 New and Refill Drug Prescriptions PConnect-regular Ins  
 New and Refill Mixture Prescriptions PConnect-regular Ins  
 Refills Requiring Pharmacist Extension PConnect-extension Ins  
 Refills Requiring Doctor Callback PConnect-Doctor Callback Ins

When calculating due dates, defer items due within 15 minutes of closing until next business day.

Patient Reports  
 Allow Tax Receipts Report  Allow Medical History Report  Allow Medical Expenses Report  
 Configure Patient Tax Receipts Options Configure Medical History Options Configure Medical Expenses Options  
 Configure Patient Test Report

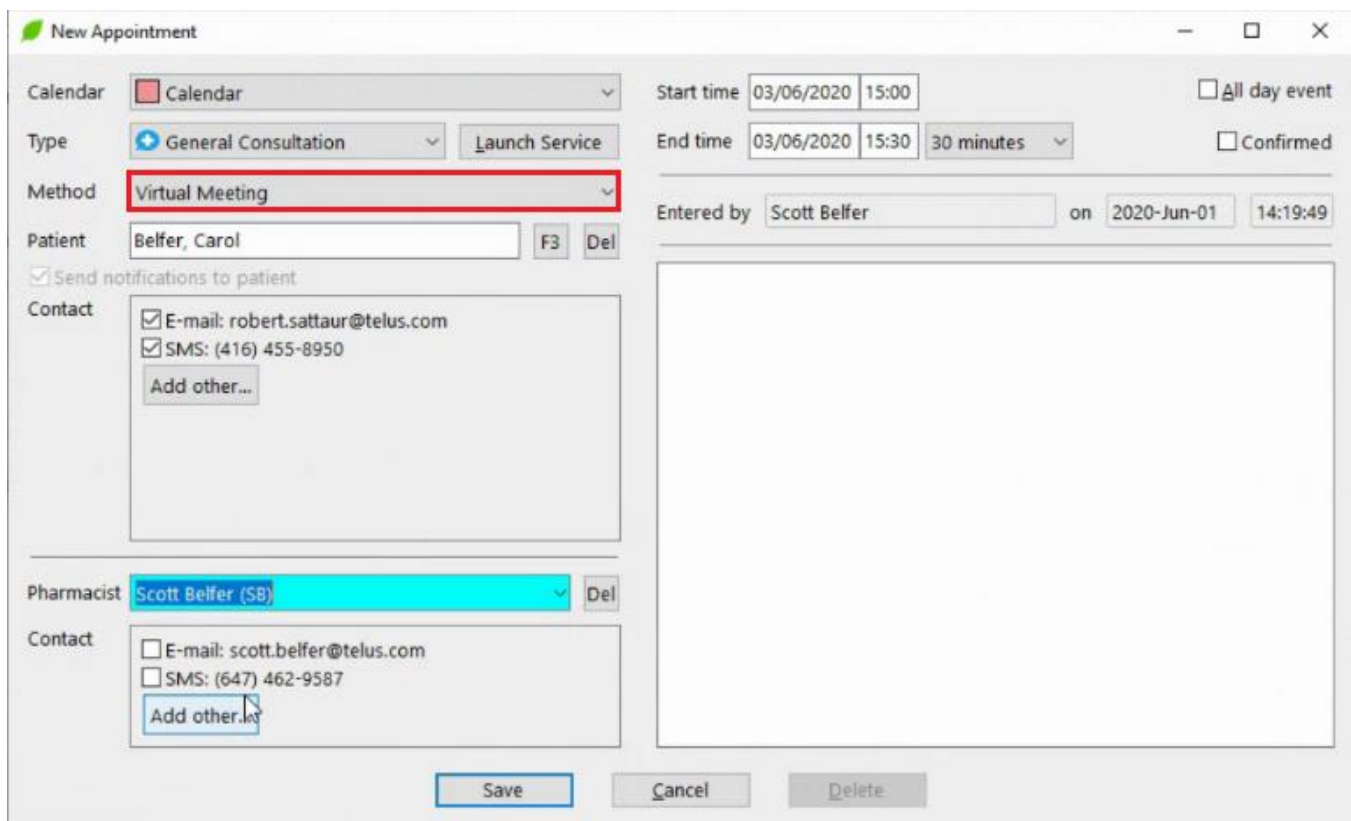
Send outbound SMS messages to Pharmacylink network: QA Scotts Virual Office  
 Send outbound Email messages to Pharmacylink network: QA Scotts Virual Office  
 Send appointment notifications using Pharmacylink network: QA Scotts Virual Office

Networks  
 Description  
 Demo-International-Centre-Pharmacy  
 TELUS PharmaConnect STAGE Network  
 TELUS PharmaConnect Telus Pharmacy  
 Pure Integrative Pharmacy Scotts Pharmacy  
 Pure Integrative Pharmacy Scotts Pharmacy



## Setting up a Virtual Consultation Appointment

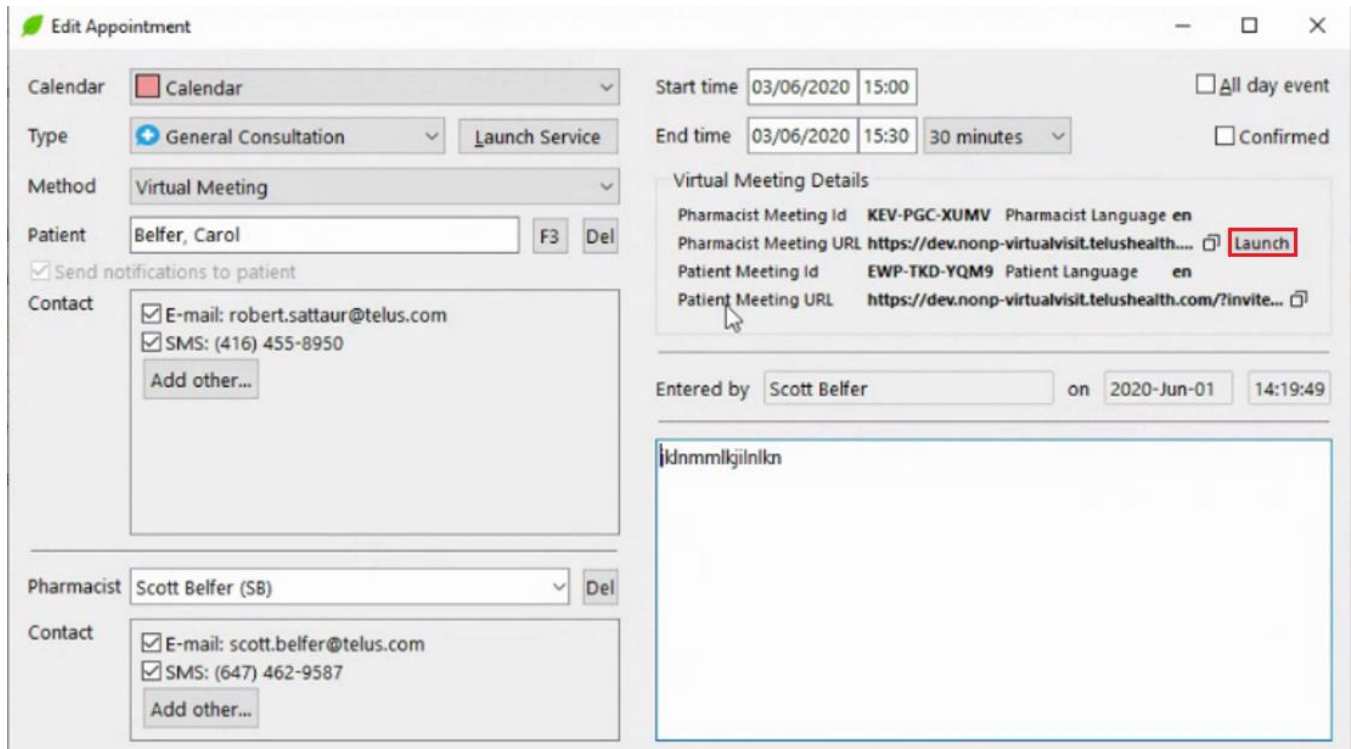
1. Select the Calendar tile from the Kroll Start Screen.
2. Click **New** or double click on the applicable calendar date.
3. The New Appointment form will be displayed. Complete the form with the information necessary including contact information for both the patient and the pharmacist. Ensure that the 'Method' is set to **Virtual Meeting**.



**NOTE:** If the pharmacist has their email and SMS number populated in the Users and Groups screen, their SMS and email will then be extracted from there directly into the Contact box of the Pharmacist.

4. Click Save. The appointment is now synched and will be displayed in the Calendar view and the patient will receive a confirmation message via email and/or SMS.

- When you are ready to start the virtual consultation, simply double click on the appointment from the calendar view and click on the Launch button in the Virtual Meeting details section.



### Modifying an Appointment

- Double-click the appointment you want to modify.
- The **Edit Appointment** form will appear. Make the necessary changes and click **Save**. The patient will receive a notification via email and/or SMS that the appointment has been changed.

### Deleting an Appointment

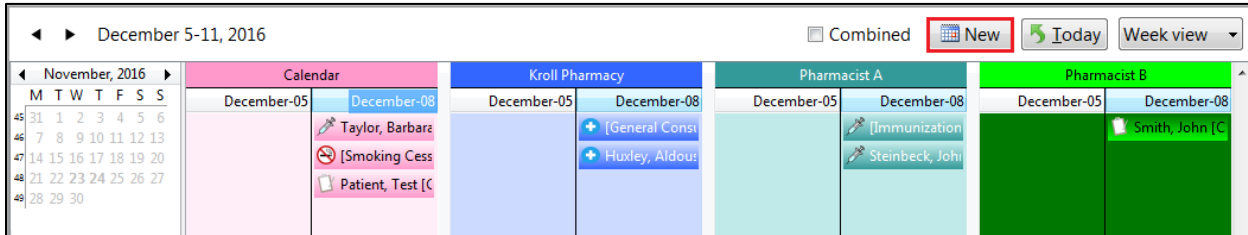
- Double-click the appointment you want to delete.
- The **Edit Appointment** form will appear. Click **Delete**.
- A prompt will appear asking if you are sure you want to delete the event. Answer **Yes**.
- The patient will receive an email and/or an SMS stating that the appointment has been cancelled, and the appointment will be removed from the calendar.

## Appointments

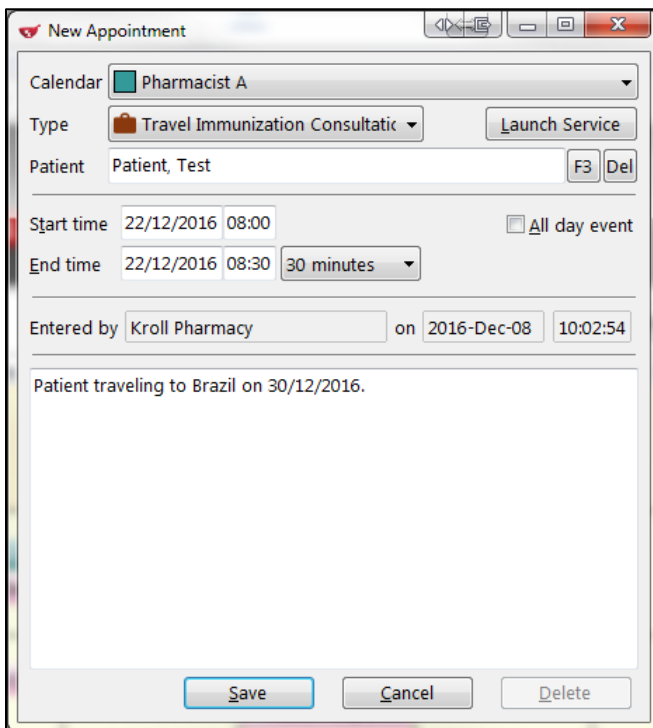
This section explains how to create, modify, and delete appointments, and how to launch scheduled services directly from the Calendar.

### Inserting a New Appointment

1. Click **New**, or double-click the applicable calendar date.



2. The **New Appointment** form will appear. Complete the form and click **Save**.



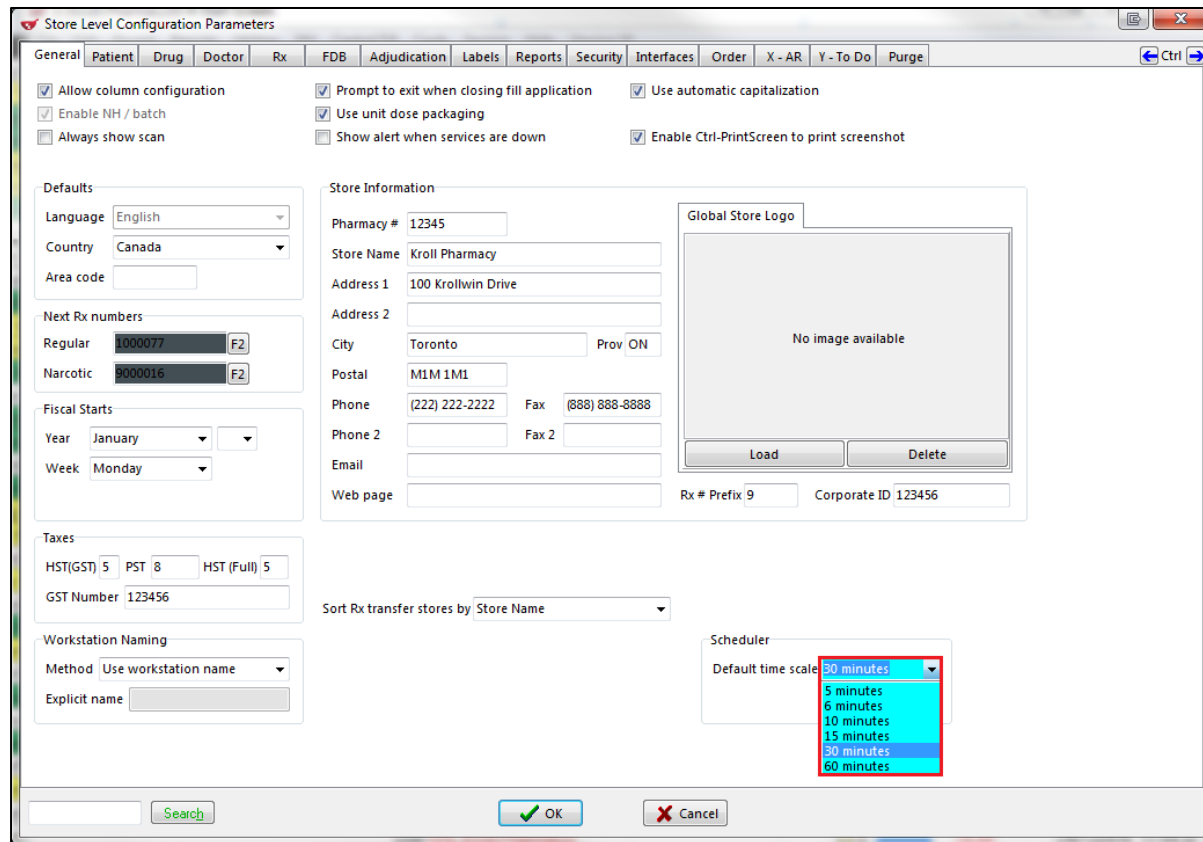
The 'New Appointment' form is displayed. It includes the following fields and options:

- Calendar:** A dropdown menu set to 'Pharmacist A'.
- Type:** A dropdown menu set to 'Travel Immunization Consultatic' with a 'Launch Service' button next to it.
- Patient:** A text field containing 'Patient, Test' with 'F3' and 'Del' buttons next to it.
- Start time:** A date and time field set to '22/12/2016 08:00'.
- End time:** A date and time field set to '22/12/2016 08:30' with a '30 minutes' dropdown menu next to it.
- All day event:** A checkbox that is currently unchecked.
- Entered by:** A text field containing 'Kroll Pharmacy'.
- on:** A date and time field set to '2016-Dec-08 10:02:54'.
- Description:** A text area containing the text 'Patient traveling to Brazil on 30/12/2016.'
- Buttons:** 'Save', 'Cancel', and 'Delete' buttons at the bottom.

- **Calendar:** Select the calendar you want to assign the appointment to.
- **Type:** Select an appointment type.
- **Patient:** Click **F3** to optionally search for and select a patient. Once a patient is selected, the **Del** button can be used to remove the patient from the appointment.

- **Start time/End time:** Enter the start time. Select the length of the appointment from the list. The end time will update accordingly.

**NOTE:** The appointment length defaults to 30 minutes. This can be changed in the **Store Level Configuration Parameters > General** screen.

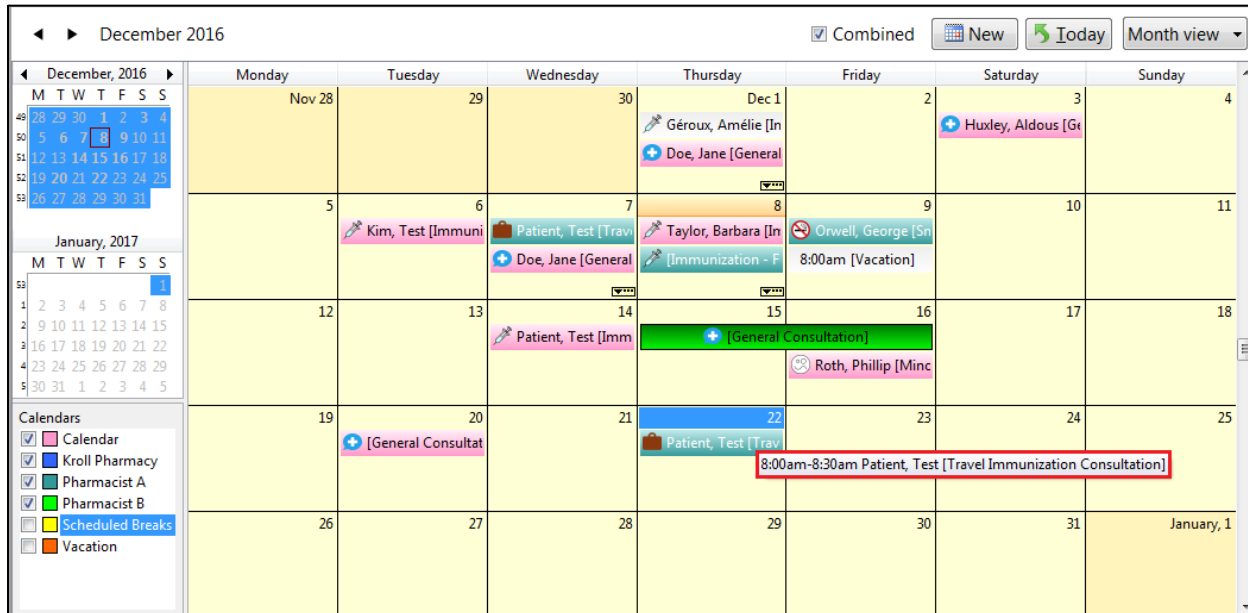


The screenshot shows the 'Store Level Configuration Parameters' window with the 'General' tab selected. The window contains several sections:

- Checkboxes:**
  - Allow column configuration (checked)
  - Enable NH / batch (checked)
  - Always show scan (unchecked)
  - Prompt to exit when closing fill application (checked)
  - Use unit dose packaging (checked)
  - Show alert when services are down (unchecked)
  - Use automatic capitalization (checked)
  - Enable Ctrl-PrintScreen to print screenshot (checked)
- Defaults:**
  - Language: English
  - Country: Canada
  - Area code: (empty)
- Next Rx numbers:**
  - Regular: 1000077
  - Narcotic: 9000016
- Fiscal Starts:**
  - Year: January
  - Week: Monday
- Taxes:**
  - HST(GST): 5, PST: 8, HST (Full): 5
  - GST Number: 123456
- Workstation Naming:**
  - Method: Use workstation name
  - Explicit name: (empty)
- Store Information:**
  - Pharmacy #: 12345
  - Store Name: Kroll Pharmacy
  - Address 1: 100 Krollwin Drive
  - Address 2: (empty)
  - City: Toronto, Prov: ON
  - Postal: M1M 1M1
  - Phone: (222) 222-2222, Fax: (888) 888-8888
  - Phone 2: (empty), Fax 2: (empty)
  - Email: (empty)
  - Web page: (empty)
  - Rx # Prefix: 9, Corporate ID: 123456
- Global Store Logo:** No image available. Buttons: Load, Delete.
- Scheduler:** Default time scale dropdown menu is open, showing options: 5 minutes, 6 minutes, 10 minutes, 15 minutes, 30 minutes (highlighted), 60 minutes.

- **All day event:** Check this flag if the appointment will run all day. No start or end times can be selected when this flag is enabled.
- **Comments:** Enter any comments in the space provided.

- The appointment will be added to the calendar. Place the cursor over the appointment to see appointment details.

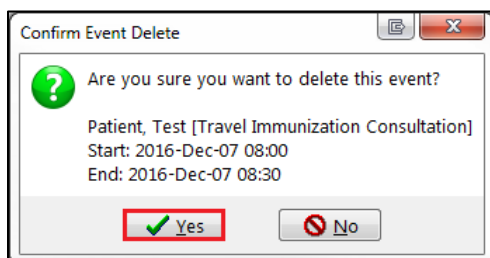


## Modifying an Appointment

- Double-click the appointment you want to modify.
- The **Edit Appointment** form will appear. Make the necessary changes and click **Save**.

## Deleting an Appointment

- Double-click the appointment you want to delete.
- The **Edit Appointment** form will appear. Click **Delete**.
- A prompt will appear asking if you are sure you want to delete the event. Answer **Yes**.



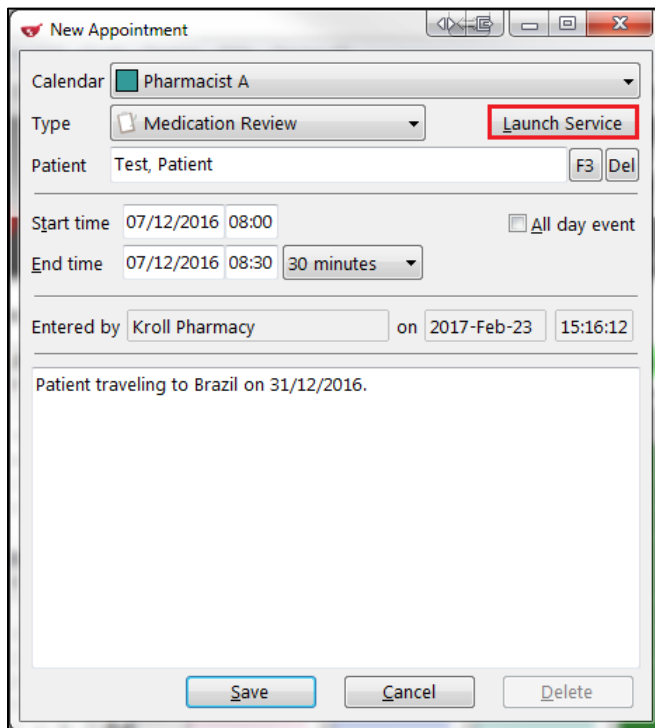
The appointment will be removed from the Calendar.

## Launching a Service

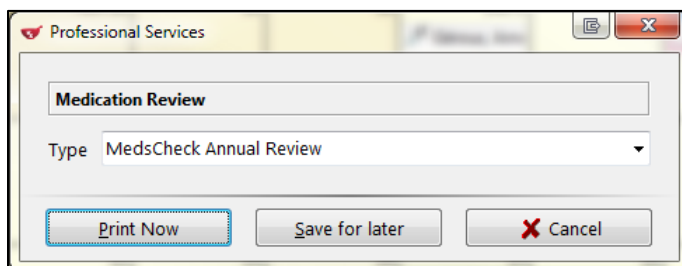
When an appointment for a service is due, the service can be launched directly from the Calendar screen.

**NOTE:** The **Launch Service** option is only available for appointments that have a service and a patient selected.

1. Double-click the appointment from the Calendar.
2. The **Edit Appointment** form will appear. Click **Launch Service**.

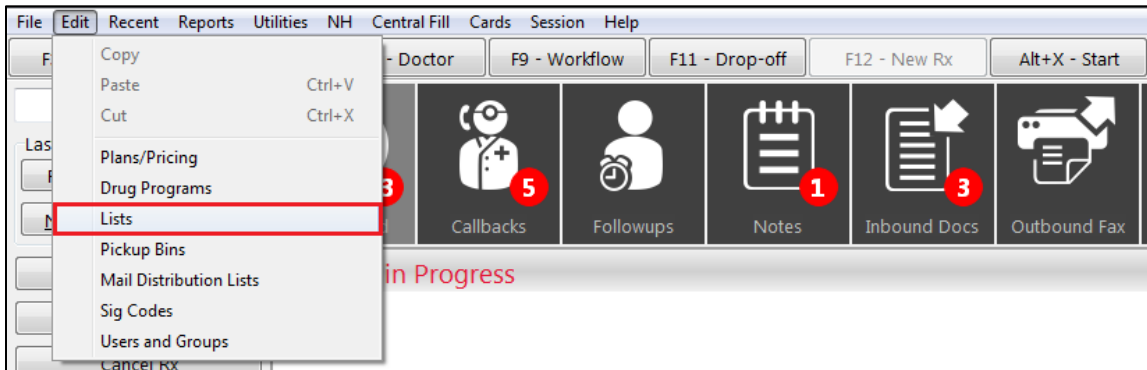


3. The **Professional Services** screen will appear with the service type selected. Select a sub **Type**, if one is available, and begin performing the service.



## Configuration

Appointment Calendar configuration settings can be accessed by selecting **Edit > Lists** from the **Alt+X - Start** screen.



This will call up the **Edit Mast Lists / Groups** screen where Appointment Types and Calendars can be added, modified, and deleted.

### Appointment Types

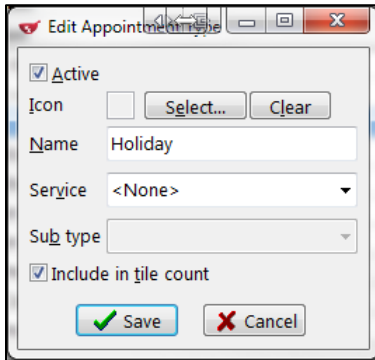
Select **Appointment Types** from the **Edit Mast Lists / Groups** screen. A list of configured appointment types will appear.

The screenshot shows the 'Edit Mast Lists / Groups' window. The 'Appointment Types' section is selected in the left sidebar. The main area displays a table of appointment types with columns for Active, Icon, Description, Service, and Tile count.

Active	Icon	Description	Service	Tile count
✓	📄	Care Plan Review	Care Plan	Yes
✓	👤	General Consultation	General Counseling	Yes
✓	💉	Immunization - Flu Shot	Immunization	Yes
✓	💉	Immunization - Other	Immunization	Yes
✓	📄	Medication Review	Medication Review	Yes
✓	📄	Medication Review Follow-up	Medication Review	Yes
✓	👤	Minor Ailment Consultation	Minor Ailment	Yes
✓	🚫	Smoking Cessation Consultation	General Counseling	Yes
✓	👤	Travel Immunization Consultation	General Counseling	Yes

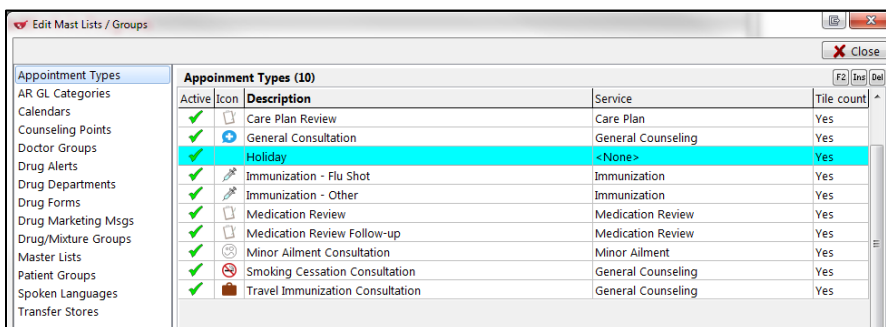
## Inserting an Appointment Type

1. Click **Ins** or press the **Insert** key on your keyboard.
2. The **Edit Appointment Type** form will appear. Complete the form and click **Save**.



- **Active:** Enable this flag to make the appointment type selectable when creating a new appointment.
- **Icon:** To optionally add an icon to the appointment type, click **Select...** and locate an 16x16 pixel image file. To remove the icon from the appointment type, click **Clear**.
- **Name:** Enter the name of the appointment type.
- **Service:** Select a service associated with the appointment type. If the appointment type is not a service, leave this field blank.
- **Sub type:** A sub type may be automatically selected based on your **Service** selection.
- **Include in tile count:** Enable this flag to have instances of the appointment type included in the **Calendar** tile count.

The appointment type will be added to the **Appointment Types** list.



Active	Icon	Description	Service	Tile count
✓		Care Plan Review	Care Plan	Yes
✓		General Consultation	General Counseling	Yes
✓		Holiday	<None>	Yes
✓		Immunization - Flu Shot	Immunization	Yes
✓		Immunization - Other	Immunization	Yes
✓		Medication Review	Medication Review	Yes
✓		Medication Review Follow-up	Medication Review	Yes
✓		Minor Ailment Consultation	Minor Ailment	Yes
✓		Smoking Cessation Consultation	General Counseling	Yes
✓		Travel Immunization Consultation	General Counseling	Yes

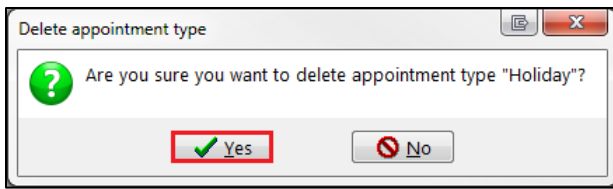


### Modifying an Appointment Type

1. Select the appointment type you want to modify and click **F2**, or press the **F2** key on your keyboard.
2. The **Edit Appointment Type** form will appear. Make the necessary changes and click **Save**.

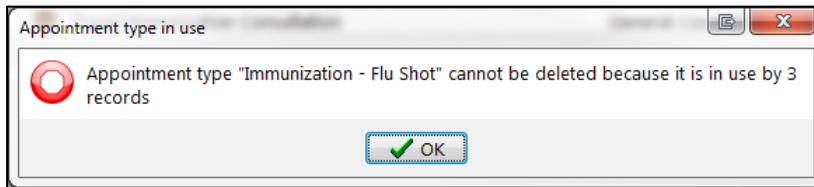
### Deleting an Appointment Type

1. Select the appointment type you want to delete and click **Del**, or press the **Delete** key on your keyboard.
2. A prompt will appear asking if you are sure you want to delete the appointment type. Answer **Yes**.



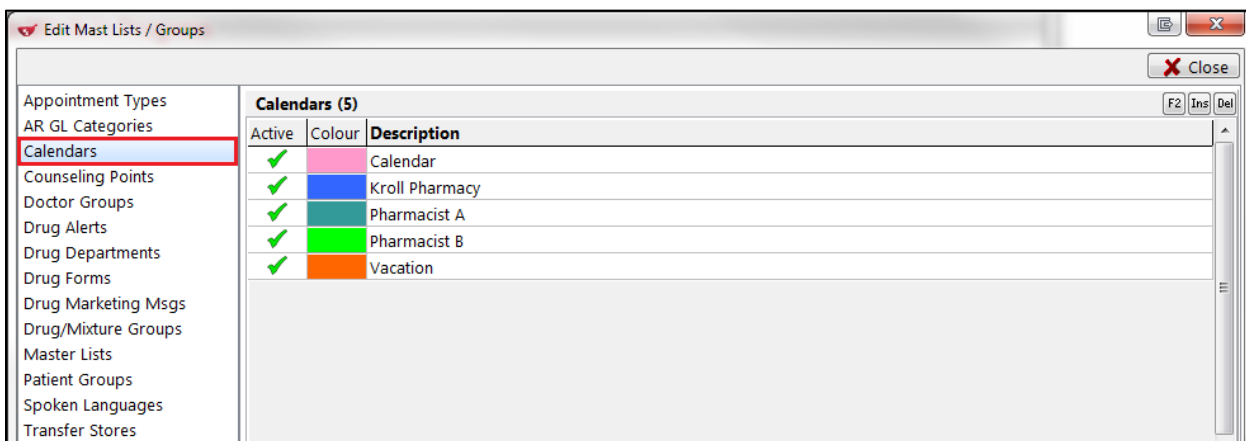
The appointment type will be removed from the **Appointment Types** list.

**NOTE:** If there are active appointments associated with the appointment type, the following prompt will appear if you attempt to delete it:



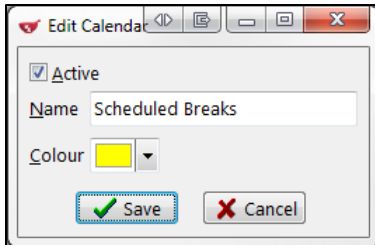
## Calendars

Select **Calendars** from the **Edit Mast Lists / Groups** screen. A list of configured calendars will appear.



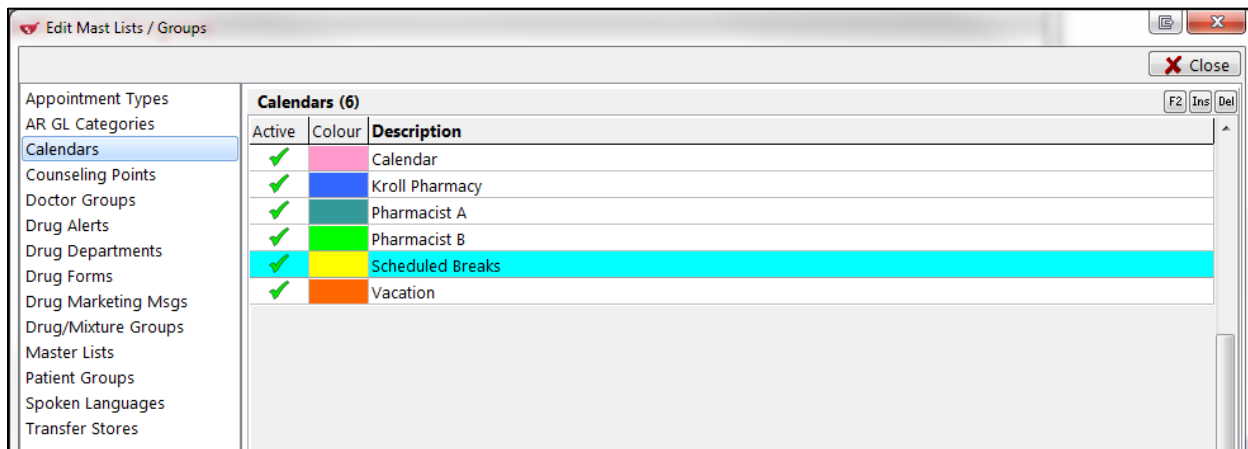
## Inserting a Calendar

1. Click **Ins** or press the **Insert** key on your keyboard.
2. The **Edit Calendar** form will appear. Complete the form and click **Save**.



- **Active:** Enable this flag to make the calendar selectable when creating a new appointment.
- **Name:** Enter the name of the calendar.
- **Colour:** Select the colour you want associated with the calendar. This will default to black if no colour is selected.

The calendar will be added to the **Calendars** list.

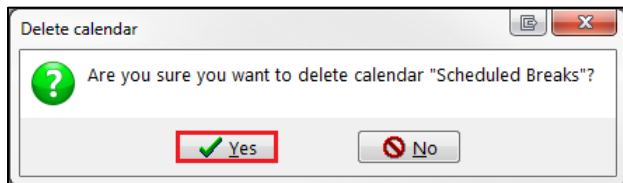


### Modifying a Calendar

1. Select the calendar you want to modify and click **F2**, or press the **F2** key on your keyboard.
2. The **Edit Calendar** form will appear. Make the necessary changes and click **Save**.

### Deleting a Calendar

1. Select the calendar you want to delete and click **Del**, or press the **Delete** key on your keyboard.
2. A prompt will appear asking if you are sure you want to delete the calendar. Answer **Yes**.



The calendar will be removed from the **Calendars** list.

**NOTE:** If there are active appointments associated with the calendar, the following prompt will appear if you attempt to delete it:

