Auto Fill Functionality

June 20201

TELUS Health

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Auto Fill Functionality

Auto Fill functionality in Kroll integrates with existing pharmacy IVR systems and vendors to carry out automatic refill reminder notifications for designated patients. This feature increases patient compliance, customer satisfaction, and pharmacy productivity.

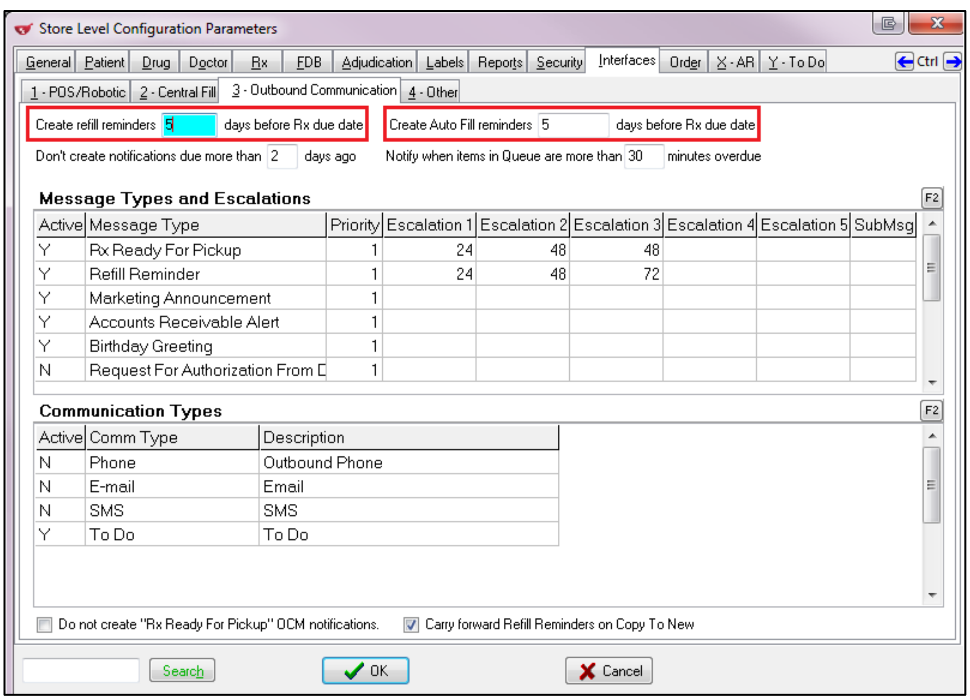
Configuration

The following section outlines the configuration parameters that must be in place to use Auto Fill functionality in Kroll.

Creating Refill and Autofill Reminders

Refill reminders are sent to patients prior to the date of refill. This gives patients time to respond and ensure proper compliancy. Auto Fill reminders notify pharmacy users that an Rx is to be refilled by placing the Rx in the To Do queue.

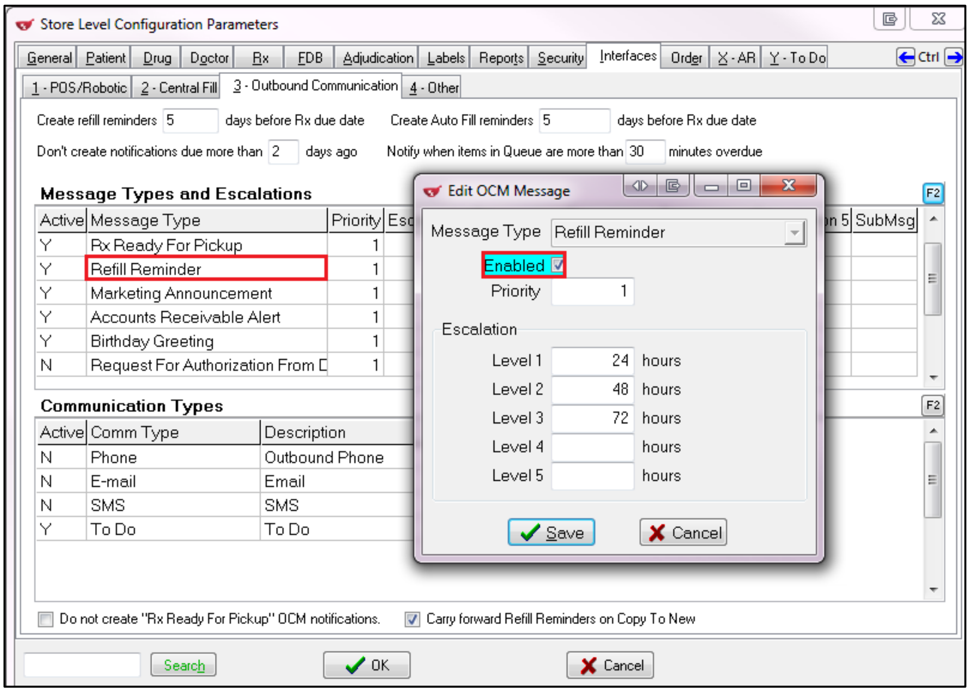
1. Go to **File** > **Configuration** > **Store** > **Interfaces** > **Outbound Communication** and set the refill reminder date in the **Create refill reminders [x] days before Rx due date** field and the Autofill reminder date in the **Create refill reminders [x] days before Rx due date** field.



Enabling Message Types Escalations

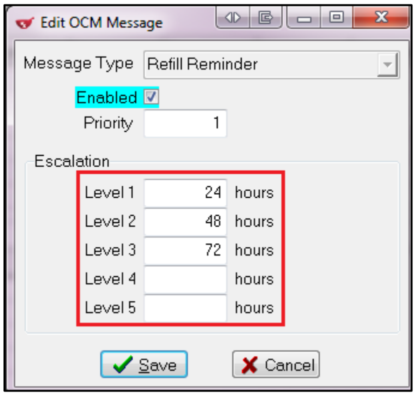
Message types indicate the types of communications enabled in the system. Supported message types will vary from vendor to vendor.

1. Double-click **Refill Reminder** in the **Message Types and Escalations** list. The **Edit OCM Message** form will appear. Ensure the **Enabled** checkbox is checked.



2. Set the **Priority** level you want to assign refill reminders. This will indicate to the IVR or third party system the order in which messages should be processed. Any numerical value can be entered; '1' is the highest priority.

3. Set the **Escalation** levels you want to assign refill reminders. **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. When you are finished, click **Save**.

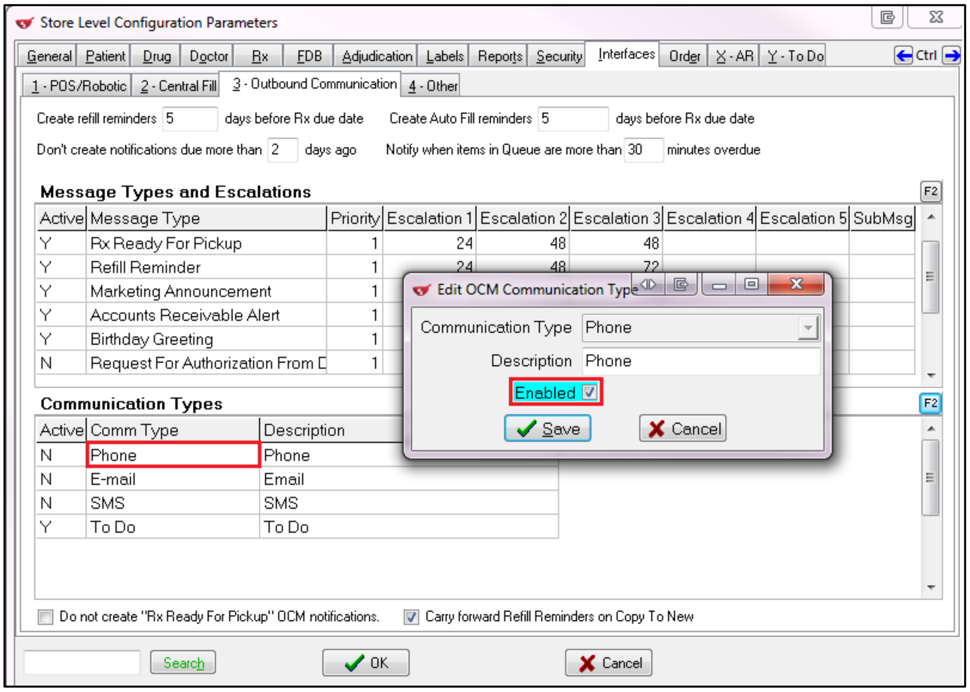


Enabling Communication Types

Communication types are methods of communication that are used to contact patients. Support for communication types will vary from vendor to vendor. The available communication types include:

- **Phone**: A phone call will be made by an Interactive Voice Response system;
- **E-mail**: Communication will be sent via e-mail;
- **SMS**: Recipients will receive a text message reminder on their cellular device;
- **To Do**: Prescriptions marked as Auto Refill will appear in the To Do module;

1. Ensure the necessary **Communication Types** are enabled. To enable a communication type, double-click the entry. The **Edit OCM Communication Type** window will appear. Click the **Enabled** checkbox. When you are finished, click **Save**.



Setting Prompting Options

There are a couple of additional options that can be set in store-level configuration. To access and enable these options, go to **File** > **Configuration** > **Store** > **Y - To Do**.

- **Prompt for refill mode when refilling from pat profile**: When enabled, you will be prompted to enroll the patient in Autofill when refilling an Rx from the patient profile;
- **Confirm Patient Profile Refills If In Drop Off Screen**: When enabled, you will be prompted to confirm the patient's Refill Reminder enrolment in the Drop Off screen.

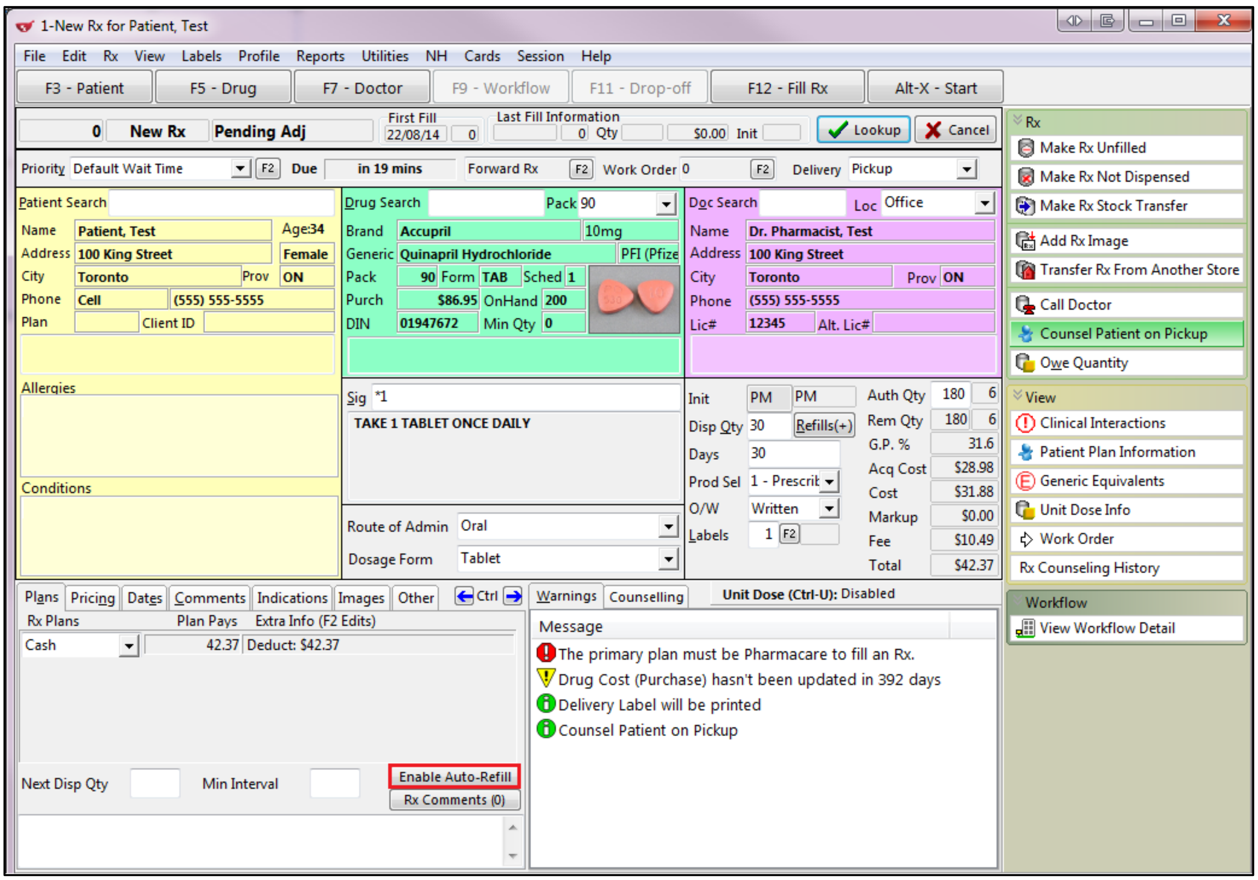
Enrolling Patients in the Refill Reminder Program

The following section outlines the process of enabling Auto Refills. In order to generate a refill reminder, the patients must have refills and should have enrolled in Outbound Communications.

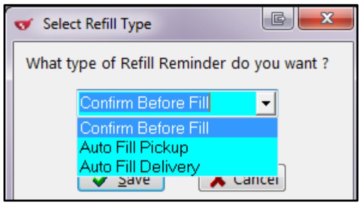
Enrolling from the F12 - Fill Rx Screen

1. Locate a patient and access the **F12 - Fill Rx** screen.

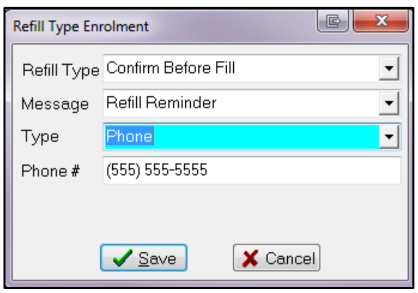
2. Click the **Enable Auto-Refill** button.



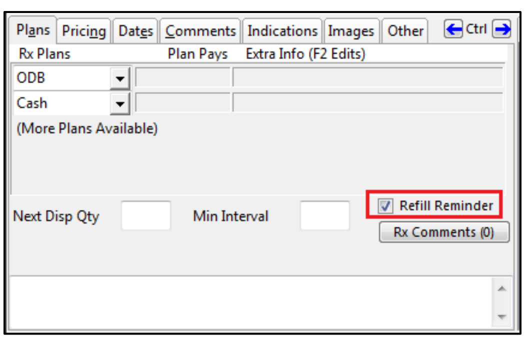
1. Select the appropriate type of refill reminder from the **Select Refill Type** dropdown menu and click **Save**.



2. If you selected **Confirm Before Fill** from the **Select Refill Type** dropdown menu, you will be prompted to complete the **Refill Type Enrolment** form. Make the appropriate selections from the **Message** and **Type** dropdown menus. The patient's contact information will auto-populate according to your **Type** selection. When you are finished, click **Save**.

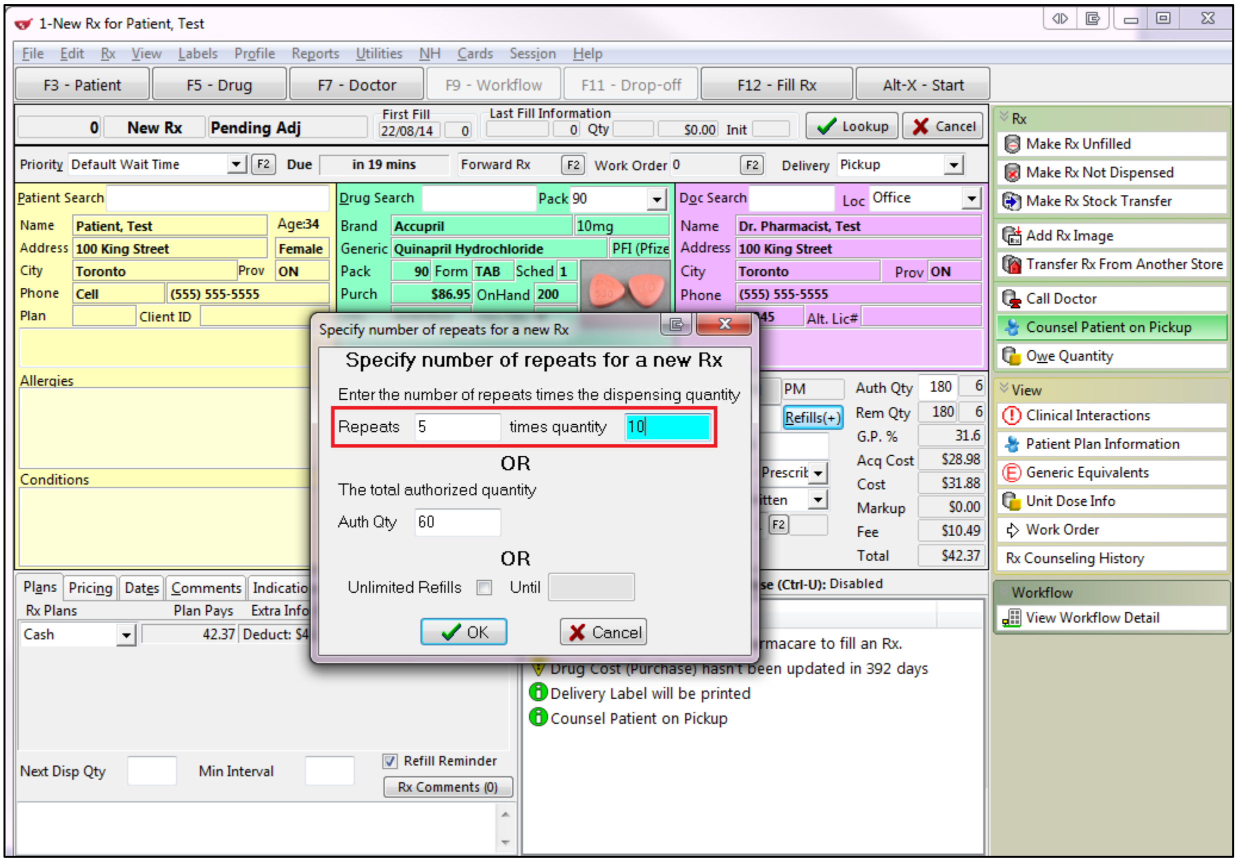


3. The **F12 - Fill Rx Screen** will show an enabled **Refill Reminder** checkbox where the **Enable Auto-Refill** button was.

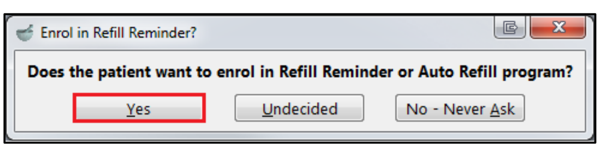


Enrolling While Filling an Rx

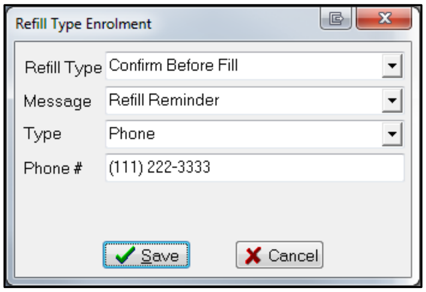
1. Access the **New Rx** card and begin filling an Rx. Click the **Refills(+)** button to enter the number of repeats and the dispensing quantity that applies to the Rx. The **Auth Qty** field will auto-populate according to the information you enter. Click **OK**.



2. Click the **Fill Rx** button. A prompt asking '**Does the patient want to enroll in Refill Reminder or Auto Refill program?**' will appear. Click **Yes**.



3. Configure the enrolment according to the patient's preferences. Click **Save**.

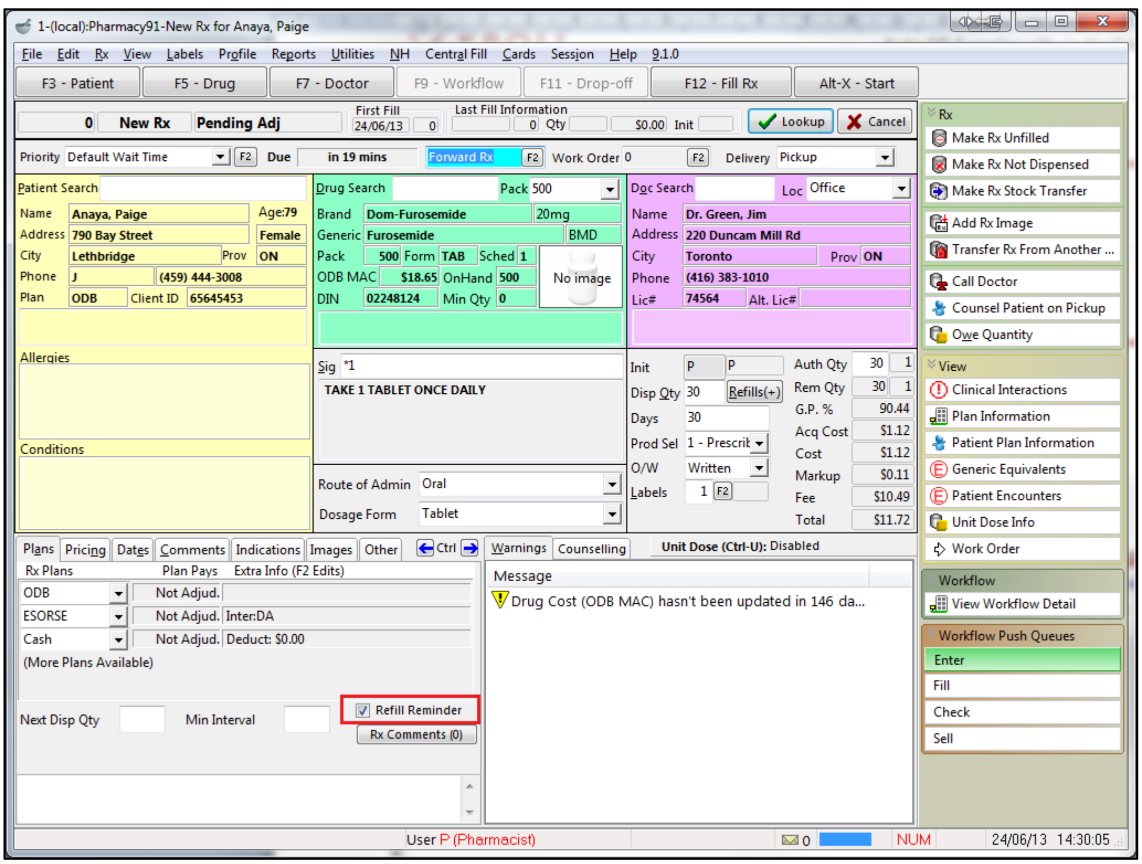


Flagging an Rx for Refill Reminders

In order for a refill reminder to be generated, the Rx must have refills and the patient must be enrolled in the Refill Reminder program.

1. Locate a patient and access the **F12 - Fill Rx** screen.

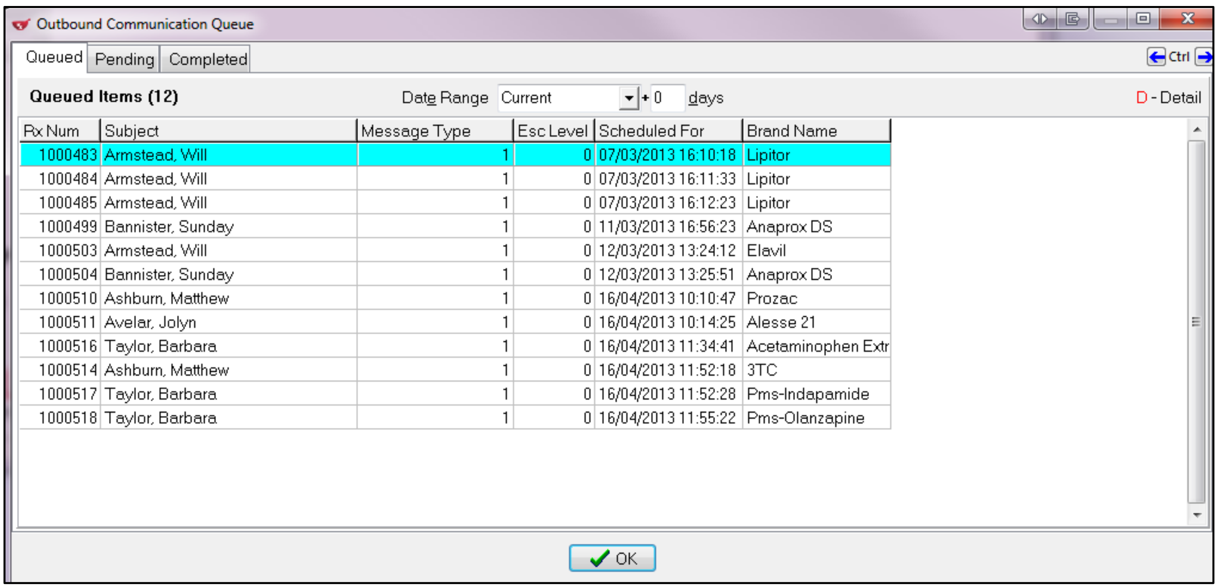
2. Place a checkmark next to **Refill Reminder**.



Viewing the Outbound Communication Queue

Once communications have been generated their status can be viewed to determine if there were any problems or if the communications were successful. Depending on the type of communication, other information can be gleaned from the queue such as whether or not a patient confirmed a refill.

1. From the Start screen, go to **Utilities** > **Outbound Communications** > **View Queue**. The **Outbound Communication Queue** window will open.



Rx Num	Subject	Message Type	Esc Level	Scheduled For	Brand Name
1000483	Armstead, Will	1	0	07/03/2013 16:10:18	Lipitor
1000484	Armstead, Will	1	0	07/03/2013 16:11:33	Lipitor
1000485	Armstead, Will	1	0	07/03/2013 16:12:23	Lipitor
1000499	Bannister, Sunday	1	0	11/03/2013 16:56:23	Anaprox DS
1000503	Armstead, Will	1	0	12/03/2013 13:24:12	Elavil
1000504	Bannister, Sunday	1	0	12/03/2013 13:25:51	Anaprox DS
1000510	Ashburn, Matthew	1	0	16/04/2013 10:10:47	Prozac
1000511	Avelar, Jolyn	1	0	16/04/2013 10:14:25	Alesse 21
1000516	Taylor, Barbara	1	0	16/04/2013 11:34:41	Acetaminophen Extr
1000514	Ashburn, Matthew	1	0	16/04/2013 11:52:18	3TC
1000517	Taylor, Barbara	1	0	16/04/2013 11:52:28	Pms-Indapamide
1000518	Taylor, Barbara	1	0	16/04/2013 11:55:22	Pms-Olanzapine

- **Queued** tab: Displays communications that have not yet been pushed to the IVR/third party system.
- **Pending** tab: Displays communications that have been pushed to the IVR/third party system, but have not yet been delivery to the recipient and/or no response from the recipient has been received.
- **Completed** tab: Displays communications that have been sent to the IVR/third party system and have resulted in either a successful transmission or an error.

2. Double click an item from the **Queued Items** list to view the details of the selected item. Click **OK** to close the **Communications Queue – Item Detail** window.