

Auto Fill Functionality

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Table of Contents

Auto Fill Functionality	. 2
Configuration	. 2
Creating Refill and Autofill Reminders	. 2
Enabling Message Types Escalations	. 3
Enabling Communication Types	. 4
Setting Prompting Options	. 5
Enrolling Patients in the Refill Reminder Program	6
Enrolling from the F12 - Fill Rx Screen	6
Enrolling While Filling an Rx	. 8
Flagging an Rx for Refill Reminders	. 9
Viewing the Outbound Communication Queue1	10





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.

 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.

	Level Configuration Parame	ters							P	×
<u>G</u> eneral	Patient Drug Doctor	<u>B</u> × <u>F</u> DB	Adjudio	cation Labels	Reports Secu	ity <u>I</u> nterfaces	Ord <u>e</u> r ⊠-AF	} ⊻ · To Do	5	Ctrl 📄
1 - POS	1 - POS/Robotic 2 - Central Fill 3 - Outbound Communication 4 - Other									
Create	refil remindere E daue	before Ru di	in data	Create Auto Fil	remindere 5	dave be	fore Pu due date]		
Create				Cleate Autorn		udys De				
Don't d	create notifications due more tha	n 2 day	is ago	Notify when iter	ns in Queue are i	more than 30	minutes overdu	le		
Mes	sage Types and Esca	lations								F2
Activ	el Message Type		Priority	Escalation 1	Escalation 2	Escalation 3	Escalation 4	Escalation !	5 SubMsa	
Y	Rx Ready For Pickup		1	24	48	48				
Y	Refill Reminder		1	24	48	72				Ξ
Y	Marketing Announceme	ent	1							
Y	Accounts Receivable A	Nert	1							
Y	Birthday Greeting		1							
N	Request For Authorizat	ion From [1							_
Com	munication Types									F2
Acti∨	e Comm Type	Descript	ion							*
N	Phone	Outboun	d Phone)						
N	E-mail	Email								E
N	SMS	SMS								
Y	Y To Do To Do									
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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.

🍠 Store L	evel Configuration Para	meters						
<u>G</u> eneral	Patient Drug Doctor	<u>Rx</u> <u>E</u> DB <u>A</u> djudic	fication Labels Reports Security Interfaces Order X-AR Y-ToDo					
1 - POS/	Robotic 2 - Central Fill	3 - Outbound Communicati	ation 4 - Other					
		- 						
Lreate n	erill reminders 5	ays before Hx due date	Lreate Auto Hill reminders 5 days before Hx due date					
Don't cr	eate notifications due more	than 2 days ago	Notify when items in Queue are more than 30 minutes overdue					
Mess	age Types and Es	calations	👽 Edit OCM Message					
Active	Message Type	Priority	y Esc Message Type Rofil Rominder					
Y	Rx Ready For Picku	p 1						
Y	Refill Reminder	1	1 Enabled 🔽					
Y	Marketing Announce	ement 1	1 Priority 1					
Y	Accounts Receivabl	e Alert 1	1 Excelation					
Y	Birthday Greeting	1	1					
N	Request For Authoria	zation From E 1	1 Level 1 24 hours					
Comr	nunication Types		Level 2 48 hours					
Acti∨e	Comm Type	Description	Level 3 72 hours					
N	Phone	Outbound Phone	Level 4 hours					
N	E-mail	Email	Level 5 hours					
N	SMS	SMS						
Y	To Do	To Do	Save X Cancel					
	<u>۲</u>							
Do i	🔲 Do not create "Rx Ready For Pickup" OCM notifications. 🛛 😨 Carry forward Refill Reminders on Copy To New							
	Search	Ok	DK Cancel					
	Search							

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.

🤝 Edit OCM Messa	age 🔄					
Message Type	Refill Remi	nder 🗾				
Enabled Priority 1						
Escalation						
Level 1	24	hours				
Level 2	48	hours				
Level 3	72	hours				
Level 4		hours				
Level 5		hours				
Save X Cancel						





 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.

🤝 Edit C	CM Messa	ige 🔄	() e		x
Messag	ge Type	Refill Remi	nder		-
	Enabled	V			
	Priority	1			
Escal	ation				
	Level 1	24	hours		
	Level 2	48	hours		
	Level 3	72	hours		
	Level 4		hours		
	Level 5		hours		
		Save	🗙 Ca	ancel	

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;





Store L	Level Configuration Par	ameters		e	23			
eneral	Patient Drug Doctor	<u>B</u> x <u>F</u> DB	Adjudicati	ion Labels Reports Security Interfaces Order X-AR Y-To Do	Ctrl			
<u>1</u> - POS/	Robotic 2 - Central Fill	3 - Outbound Co	mmunication	4 - Other				
Lreate n	erili reminders 5	Jays Derore Hx du	ie date U	reate Auto Fill reminders 5 days before Hx due date				
Don't cr	eate notifications due more	e than 2 day	sago No	otify when items in Queue are more than 30 minutes overdue				
Mess	age Types and E	scalations	para le	יייייי ארביייי ארביייי ארביייי ארביייי ארביייי בוסייעע	F2			
	Message Type		Priority E	scalation 1 Escalation 2 Escalation 3 Escalation 4 Escalation 5 Submise	<u>a</u> ~			
Y	Rx Ready For Picki	qr	1	24 48 48	- 🔲			
Y U	Refill Reminder		1		= =			
Y U	Marketing Announc	ement	1		-11			
Y U	Accounts Receivab	le Alert	1	Communication Type Phone				
Y	Birthday Greeting		1	Description Disease	-			
N	Request For Author	ization From L	1	Description Phone				
Comr	munication Types			Enabled V	F2			
Active	Comm Type	Descripti	on	Save X Cancel				
N	Phone	Phone	_					
N	E-mail	Email			≡			
Ν	SMS	SMS						
Y	To Do	To Do						
Y	To Do	To Do						
					-			
	ant and the VDA Date da Date	Distance OCM and		Constantial Defil Destindent on Const Te Name				
Do r	not create in x neady for	пскир осм по	incations.	Carry forward heminders on Copy To New				
	Search	ſ	. Л ПК	✓ Cancel				
	Search	l	VU V					

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.

Kroll





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-New Rx for Patient, Test			
File Edit Rx View Labels Profile Report	ts Utilities NH Cards Session Help		
F3 - Patient F5 - Drug F7	- Doctor F9 - Workflow F11 - Drop	off F12 - Fill Rx Alt-X - Start]
0 New Bx Pending Adj	First Fill Last Fill Information	Co oo Joit Cancel	×Rx
		30.00 mile	👩 Make Rx Unfilled
Priority Default Wait Time F2 Due	in 19 mins Forward Rx F2 Work Orde	er 0 F2 Delivery Pickup 💌	😡 Make Rx Not Dispensed
Patient Search	Drug Search Pack 90	Doc Search Loc Office 🗸	Make Rx Stock Transfer
Name Patient, Test Age:34	Brand Accupril 10mg	Name Dr. Pharmacist, Test	🖶 Add Rx Image
City Toronto Prov ON	Pack 90 Form TAB Sched 1	City Toronto Prov ON	Transfer Rx From Another Store
Phone Cell (555) 555-5555	Purch \$86.95 OnHand 200	Phone (555) 555-5555	🕞 Call Doctor
Plan Client ID	DIN 01947672 Min Qty 0	Lic# 12345 Alt. Lic#	Scounsel Patient on Pickup
			🔁 O <u>w</u> e Quantity
Allergies	Sig *1	Init PM PM Auth Qty 180 6	View
	TAKE 1 TABLET ONCE DAILY	Disp Qty 30 Refills(+) Rem Qty 180 6	() Clinical Interactions
		Days 30 G.P. % 31.6	👆 Patient Plan Information
Conditions		Prod Sel 1 - Prescrit Acq Cost S28.98 Cost S31.88	E Generic Equivalents
	Paula of Admin Oral	O/W Written V Markup \$0.00	🔁 Unit Dose Info
		Labels 1 F2 Fee \$10.49	🖒 Work Order
	Dosage Form Tablet	Total \$42.37	Rx Counseling History
Plans Pricing Dates Comments Indications	Images Other 🗲 Ctrl 🎅 <u>W</u> arnings Counselli	ng Unit Dose (Ctrl-U): Disabled	Workflow
Rx Plans Plan Pays Extra Info (F2	Edits) Message		🚛 View Workflow Detail
Cash 42.37 Deduct: \$42.37	The primary pla	n must be Pharmacare to fill an Rx.	
	Drug Cost (Purc	hase) hasn't been updated in 392 days	
	Delivery Label w	vill be printed	
	Counsel Patient	on Pickup	
Next Disc Oto	Enable Auto-Refill		
Next Disp Qty Min Interval	Rx Comments (0)		
	A		
	~		





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



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.

olment
Confirm Before Fill
Refill Reminder
Phone 📃
(555) 555-5555
✓ Save X Cancel

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

Pl <u>a</u> ns	Prici <u>ng</u>	Dat <u>e</u> s	Comments	Indications	Images	Other	E Ctrl 📄
Rx Pla	ns		Plan Pays	Extra Info (F	2 Edits)		
ODB		•					
Cash		-					
(More	Plans Av	ailable)			_		
Next D	isp Qty		Min Int	terval		Refill Rx Cor	Reminder nments (0)
							*
							Ψ.





Enrolling While Filling an Rx

 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.

of 1-New Rx for Patient, Test								
<u>F</u> ile <u>E</u> dit <u>R</u> x <u>V</u> iew <u>L</u> abels Pr <u>o</u> file Reports <u>U</u> tilities <u>N</u> H <u>C</u> ards Session <u>H</u> elp								
F3 - Patient F5 - Drug	F7 - Doc	F9 - Workflow	F11 - Drop-off	F12 - F	Fill Rx	Alt-X	- Start	
0 New Rx Pending	g Adj	First Fill Last Fill In	formation 0 Qty	\$0.00 Init	_ √ ι	ookup	Cancel	Kx
Priority Default Wait Time	2 Due in 19	9 mins Forward Rx	F2 Work Order 0	F2	Delivery Pi	ickup	•	Make Rx Not Dispensed
<u>Patient Search</u>	<u>D</u> rug S	iearch Pa	ack 90 👻 I	D <u>o</u> c Search	L	oc Office	-	Nake Rx Stock Transfer
Name Patient, Test	Age:34 Brand	Accupril	10mg	Name Dr. Pha	armacist, Te	st		🔂 Add Rx Image
City Toronto Prov	ON Pack	90 Form TAB Sched		City Toronto	to	Prov	/ ON	Transfer Rx From Another Store
Phone Cell (555) 555-5555	Purch	\$86.95 OnHand 20	0	Phone (555) 5	55-5555			🛃 Call Doctor
Plan Client ID	Specify n	umber of repeats for a new	Rx	× 45	Alt. Lic	#		👌 Counsel Patient on Pickup
	Spe	cify number of rep	eats for a new	v Rx				Come Quantity
Allergies	Enter	the number of repeats tin	nes the dispensing	quantity	PM	Auth Qty	180 6	[⊗] View
	Bana	eta E timoa	quantity 10		Refills(+)	Rem Qty	180 6	() Clinical Interactions
	Lebe	ats 5 times	quantity 10			G.P. %	31.6	👆 Patient Plan Information
Conditions	_	OR		Pre	escrik 🕶	Acq Cost	\$28.98	E Generic Equivalents
	The to	otal authorized quantity		itter	n 💌	Markup	\$0.00	🔁 Unit Dose Info
	Auth C	2ty 60		. F2	2	Fee	\$10.49	¢> Work Order
		OR				Total	\$42.37	Rx Counseling History
Pl <u>a</u> ns Prici <u>ng</u> Dat <u>e</u> s <u>C</u> omments In	idicatio Unlir	mited Refills 📃 Until		se ((Ctrl-U): Dis	abled		Workflow
Rx Plans Plan Pays Ex	tra Info							🚛 View Workflow Detail
Cash • 42.37 Dec	duct: \$4	VK UK	👗 Cancel	rma	acare to fi	ll an Rx.		
		V	Drug Cost (Purchas	e) hasn't been	updated	in 392 day	's	
		0	Delivery Label will I	e printed				
		U	Counsel Patient on	Ріскир				
Next Disp Oty Min Interv	al	🔽 Refill Reminder						
Win Interv		Rx Comments (0)						
		*						
		Ψ						

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**.

Refill Type Enr	rolment
Refill Type	Confirm Before Fill
Message	Refill Reminder
Туре	Phone 🗾
Phone #	(111) 222-3333
	✓ Save X Cancel

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**.

🛫 1-(local):Pharmacy91-New Rx for Anaya, Paige							
Eile Edit <u>B</u> x <u>V</u> iew Labels Pr <u>o</u> file Reports <u>U</u> tilities <u>N</u> H Central Fill <u>C</u> ards Session <u>H</u> elp <u>9</u> .1.0							
F3 - Patient F5 - Drug F7 - Doctor F9 - Workflow F11 - Drop-off F12 - Fill Rx Alt-X - Start							
0 New Rx Pending Adj 24/06/13 0 0 Oty \$0.00 Init V Lookup X Cance	[⊗] Rx						
	Make Rx Unfilled						
Priority Default Wait Time 🔍 F2 Due in 19 mins Forward RX F2 Work Order 0 F2 Delivery Pickup 💌	😡 Make Rx Not Dispensed						
Patient Search Pack 500 V Doc Search Loc Office	Make Rx Stock Transfer						
Name Anaya, Paige Age:79 Brand Dom-Furosemide 20mg Name Dr. Green, Jim	👫 Add Rx Image						
Address 790 Bay Street Female Generic Furosemide BMD Address 220 Duncam Mill Rd	Transfer Rx From Another						
Phone J (459) 444-3008 ODB MAC \$18.65 OnHand 500 No image Phone (416) 383-1010	Call Doctor						
Plan ODB Client ID 65645453 DIN 02248124 Min Qty 0 Lic# 74564 Alt. Lic#	Councel Patient on Pickup						
Allergies							
Sig "1 Init P P Auth Qty 30	[⊥] View						
TAKE 1 TABLET ONCE DAILY Disp Qty 30 Refills(+) Rem Qty 30 G P % 90.4	Clinical Interactions						
Days 30 Acq Cost S1.1	Plan Information						
Conditions Prod Sel 1 - Prescrit Cost S1.1	2 Patient Plan Information						
Route of Admin Oral VI Markup \$0.1	1 (E) Generic Equivalents						
Darras France Tablet	9 🕒 Patient Encounters						
Dosage rorm Tablet Total S11.7	2 🚺 Unit Dose Info						
Plans Pricing Dates Comments Indications Images Other Ctrl 🗃 Warnings Counselling Unit Dose (Ctrl-U): Disabled	C Work Order						
Rx Plans Plan Pays Extra Info (F2 Edits) Message	Workflow						
FORSE Violating InterDA	🚛 View Workflow Detail						
Cash V Not Adjud, Jatchon	Workflow Push Queues						
(More Plans Available)	Enter						
	Fill						
Next Dire Oby	Check						
Rx Comments (0)	Sell						
	, <u> </u>						
· · · · · · · · · · · · · · · · · · ·							
User P (Pharmacist) 🔤 0	UM 24/06/13 14:30:05						





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.

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

🖌 Outbound Communication Queue							
Queued F	Pending Completed					🧲 Ctri	
Queued Items (12)		Dat <u>e</u> Range	Current	▼ + 0 <u>d</u> ays		<mark>D</mark> - Detail	
Rx Num	Subject	Message Type	Esc Leve	I 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	i Alesse 21	E	
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		
						-	
				🗸 ОК			

- **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.





 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.

√ Communications Queue - Item Detail								
Patient	Armstead, Will							
Px#	1000483							
Notification	Notification Rx Ready For Pickup							
Comm Type	mm Type SMS							
Esc Level	0 Cancel							
Status	Status Waiting for action date							
Date Created 16/04/2013 10:05:58								
Date Modified 16/04/2013 10:05:58								
Scheduled Action Date 07/03/2013 16:10:18								
ОК								