

# Compliance Packaging

User Guide

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## Compliance Packaging

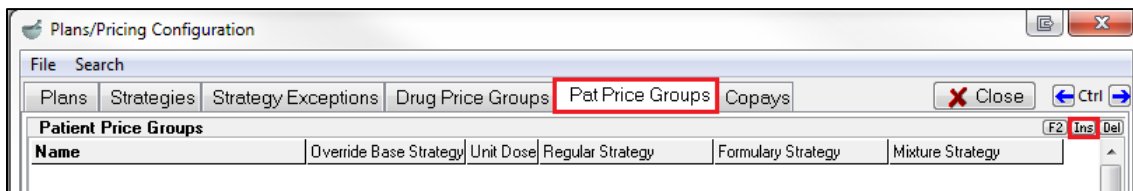
This user guide explains how to set up compliance packaging (i.e., unit dosing) in Kroll. Compliance packaging is available for both retail and nursing home patients.

### Retail

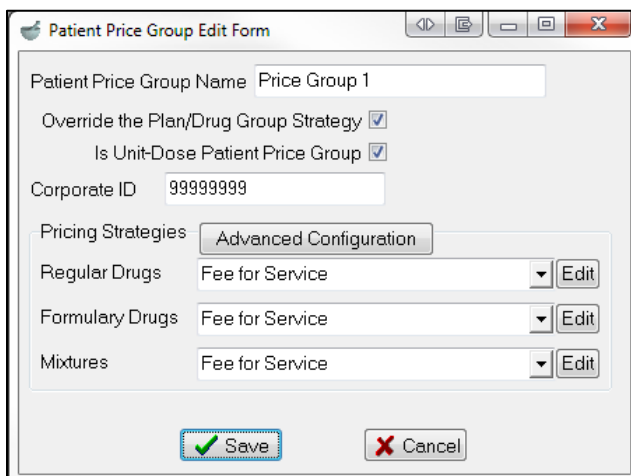
This section outlines how to set up compliance packaging for retail pharmacies. It explains how to set up patient price groups, how to configure patients for compliance packaging, and how to fill unit dose Rx's.

#### Setting up Patient Price Groups

1. From the **Alt-X Start** screen, go to **Edit > Plans/Pricing**.
2. The **Plans/Pricing Configuration** screen will appear. Select the **Pat Price Groups** tab and click **Ins**.



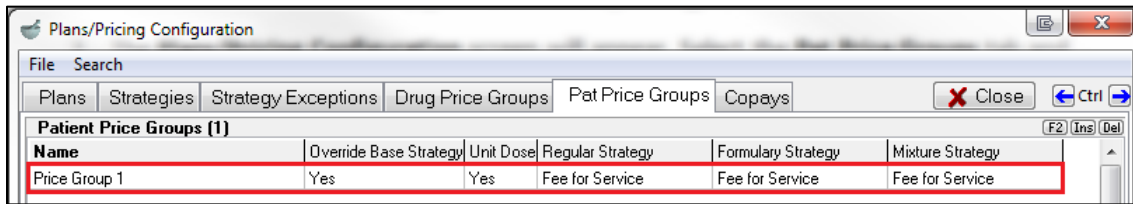
3. Complete the **Patient Price Group Edit Form**, ensuring the **Is Unit-Dose Patient Price Group** flag is enabled. Click **Save**.



The screenshot shows the 'Patient Price Group Edit Form' window. The form contains the following fields and controls:

- Patient Price Group Name: Price Group 1
- Override the Plan/Drug Group Strategy:
- Is Unit-Dose Patient Price Group:
- Corporate ID: 99999999
- Pricing Strategies: Advanced Configuration
- Regular Drugs: Fee for Service (dropdown menu) [Edit]
- Formulary Drugs: Fee for Service (dropdown menu) [Edit]
- Mixtures: Fee for Service (dropdown menu) [Edit]
- Buttons: Save (highlighted with a green box), Cancel

The price group will be added to the patient price groups list on the **Plans/Pricing Configuration** screen.

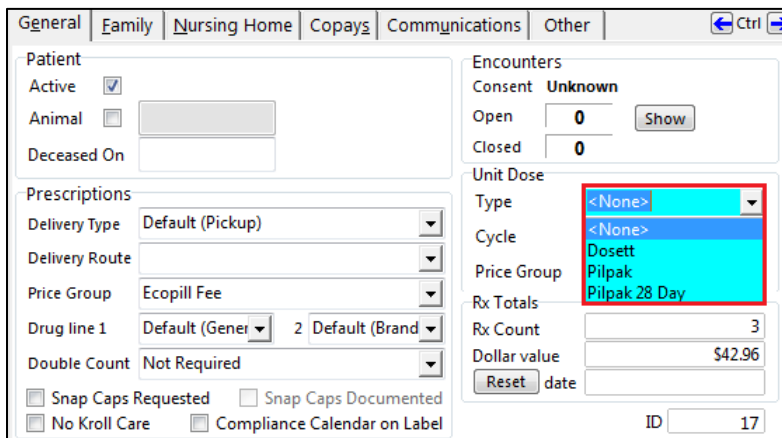


- Repeat steps 2-3 for each price group you want included in the patient groups list.
- Click Close to exit the Plans/Pricing Configuration screen.

### Configuration Patients for Compliance Packaging

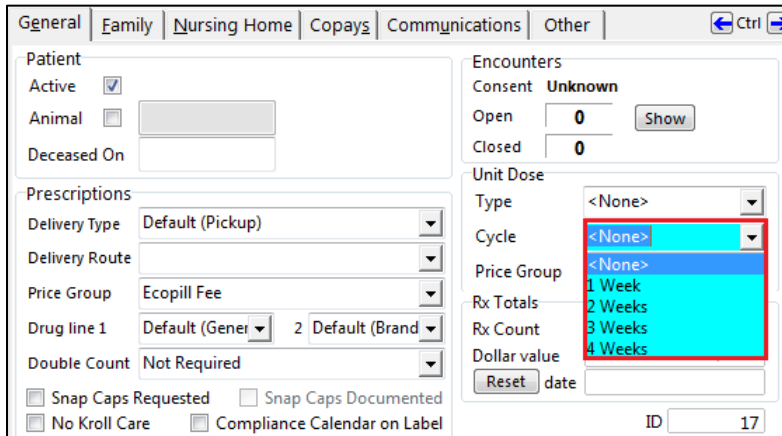
The following patient profile configuration settings are optional; they are not required in order for compliance labels to print.

- Call up the patient record for the selected patient.
- Navigate to the **General** tab and select the appropriate unit dose packaging type from the **Type** dropdown menu.



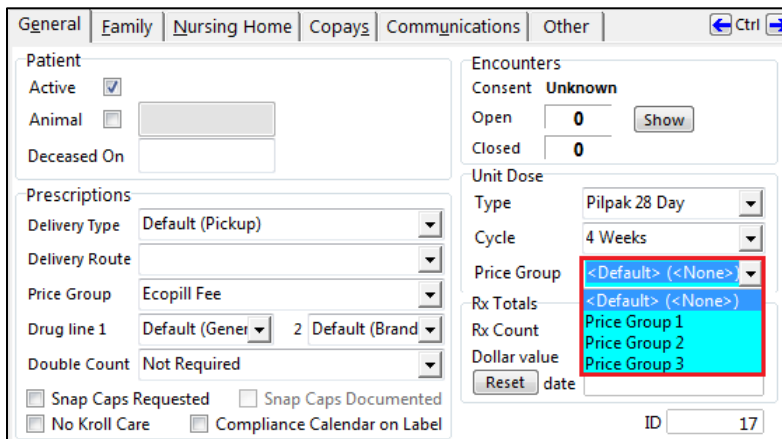
**NOTE:** When a unit dose type is set on the patient profile, the system will automatically prompt you to enroll Rx's filled for that patient into unit dosing.

3. Select the appropriate unit dose cycle from the **Cycle** dropdown menu. This will indicate the number of weeks that will elapse before the pharmacy refills the patient's medication.



The screenshot shows the 'Unit Dose' section of the software interface. The 'Cycle' dropdown menu is open, displaying options: '<None>', '1 Week', '2 Weeks', '3 Weeks', and '4 Weeks'. The '4 Weeks' option is highlighted in blue, indicating it is the selected value. Other fields in the interface include 'Patient' (Active checked), 'Encounters' (Open 0, Closed 0), 'Price Group' (Ecopill Fee), and 'Drug line 1' (Default (Gener) 2 Default (Brand)).

4. Select the appropriate price group from the **Price Group** dropdown menu.



The screenshot shows the 'Price Group' section of the software interface. The 'Price Group' dropdown menu is open, displaying options: '<Default> (<None>)', 'Price Group 1', 'Price Group 2', and 'Price Group 3'. The 'Price Group 1' option is highlighted in blue, indicating it is the selected value. Other fields in the interface include 'Patient' (Active checked), 'Encounters' (Open 0, Closed 0), 'Unit Dose' (Type: Pilpak 28 Day, Cycle: 4 Weeks), and 'Drug line 1' (Default (Gener) 2 Default (Brand)).

## Filling Unit Dose Rx's

1. Begin filling an Rx, keeping in mind the unit dose cycle set on the patient card. When all the Rx information has been entered, select **Unit Dose Info** from the right navigation pane.

The screenshot shows the 'Unit Dose Info' screen in the TELUS Health software. The patient information includes Name: Green, Sandra; Address: 100 Yonge St; City: Toronto; Prov: ON; Age: 34; Gender: Female. The drug information includes Brand: Angeliq 28; Generic: Drospirenone/Estradiol; Pack: 28; Form: TAB; Sched: 1; Route of Admin: Oral; Dosage Form: Tablet. The navigation pane on the right has 'Unit Dose Info' highlighted in red.

2. The **Rx Information** screen will appear. Complete the following:

- Ensure the **Unit Dose** flag is enabled
- Select dosing frequency from the **Frequency** dropdown menu
- Enter a **Card Number**
- Complete the unit dose chart

The 'Rx Information' dialog box shows the following information: Rx Start Date: 15/05/2014; Drug: TAB Drospirenone/Estradiol 1/1mg; Rx Stop Date: (empty); Sig: TAKE 1 TABLET ONCE DAILY. The 'Dosing' tab is active, showing the 'Unit Dose' checkbox checked, the 'Frequency' dropdown set to 'Daily', and the 'Card Number' field containing '1'. A unit dose chart is displayed at the bottom, showing a grid for 28 days with columns for Breakfast, Lunch, Dinner, and Bedtime. The first column (Day 1) has '1' in all four rows, indicating a dose at each meal and bedtime.

**NOTE:** Each card can only hold a certain number of medications, depending on the compliance packaging you use; therefore, you way with to manually allocation which medication you would like to print on which card of pilpak. If you do not manually allocate the specific car number for the medication to be contained in, Kroll will default the Card Number field to '1'.

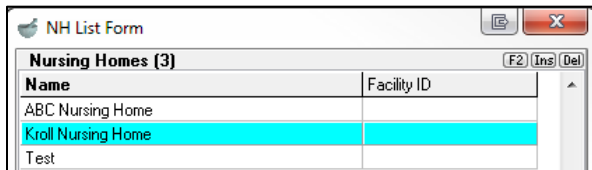
3. Click **OK** to close the **Rx Information** screen.

## Nursing Homes

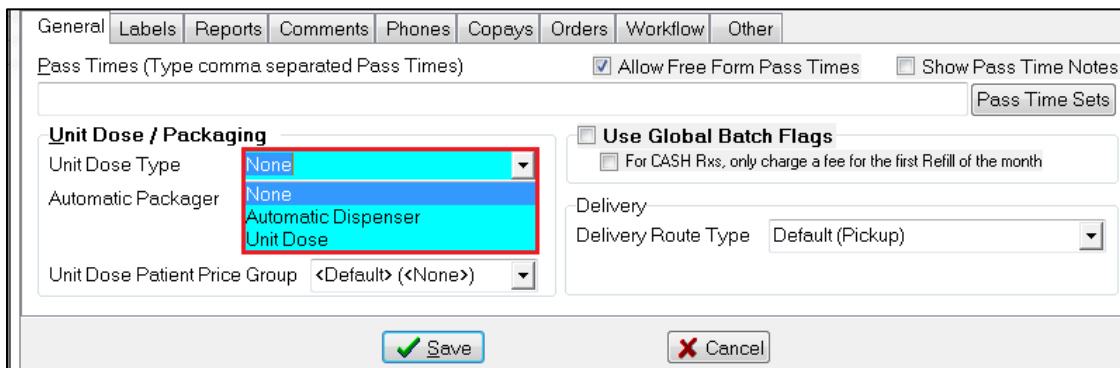
This section outlines how to set up compliance packaging for nursing homes. It explains how to set up nursing homes and how to fill unit does Rxs.

### Setting up Nursing Homes

1. From the **Alt-X Start** screen, go to **NH > Edit Nursing Home List**.
2. The **NH List Form** screen will appear. Double-click the nursing home you want to set up compliance packaging for.



3. The **Nursing Home Form** will appear. Navigate to the **General** tab and select a **Unit Dose Type** from the dropdown menu. If your pharmacy uses a packaging machine such as AutoMed, select **Automatic Packager**; otherwise, select **Unit Dose**.



**NOTE:** The selected unit dose type will apply to all patients in the nursing home; no patient-level set up is required.

## Filling Unit Dose Rx's

1. Begin filling an Rx. When all the Rx information has been entered, select **Nursing Home Info** from the right navigation pane.

The screenshot displays a pharmacy management software interface. The top menu includes File, Edit, Rx, View, Labels, Profile, Reports, Utilities, NH, Central Fill, Cards, Session, and Help. Below the menu are function keys: F3 - Patient, F5 - Drug, F7 - Doctor, F9 - Workflow, F10 - Pickup, F11 - Drop-off, F12 - Fill Rx, and Alt-X - Start.

The main interface is divided into several sections:

- Header:** Shows '0 New Rx Pending Adj', 'First Fill 15/05/14', 'Last Fill Information 0 Qty', '\$0.00 Init', and buttons for 'Lookup' and 'Cancel'.
- Priority:** 'Default Wait Time' dropdown, 'Due in 19 mins', 'Forward Rx' button, 'Work Order 0', and 'Delivery Pickup' dropdown.
- Patient Search:** Name: Green, Sandra; Age: 34; Address: 100 Yonge St; City: Toronto; Prov: ON; Phone: (555) 555-5555; Plan: ODB; Client ID: 000000.
- Drug Search:** Pack 78; Brand: Amino Cerv; Generic: Amino Acids/Sodium Propionate/ MLX (Mil); Pack: 78 Form GM Sched 3; ODB(MAC): OnHand 0; No image; DIN: 00137464; Min Qty: 0.
- Drug Search:** Name: Dr. Westheimer, Ruth; Address: 220 Dunan Mill Rd Suite 204; City: Toronto; Prov: ON; Phone: (555) 444-4444; Lic#: 123453; Alt. Lic#: 333333; Note: Unavailable on weekends.
- Instructions:** Sig '1 TAKE 1 TABLET ONCE DAILY'; Route of Admin: (dropdown); Dosage Form: Cream (Gram).
- Financials:**

Init	KRL	KRL	Auth Qty	28	1
Disp Qty	28	Refills(+)	Rem Qty	28	1
Days	28		G.P. %	59.78	
Prod Sel	3 - Pharmz		Acq Cost	\$7.57	
O/W	Written		Cost	\$7.57	
Labels	0	F2	Markup	\$0.76	
			Fee	\$10.49	
			Total	\$18.82	
- Bottom Bar:** Plans, Pricing, Dates, Comments, Indications, Images, Other, Warnings, Counselling, NH (Alt-N):, Message.

The right-hand navigation pane contains the following items:

- Rx
  - Make Rx Unfilled
  - Make Rx Not Dispensed
  - Make Rx Stock Transfer
  - Add Rx Image
  - Transfer Rx From Another ...
  - Call Doctor
  - Counsel Patient on Pickup
  - Owe Quantity
- View
  - Clinical Interactions
  - Plan Information
  - Patient Plan Information
  - Generic Equivalents
  - Patient Encounters
  - Nursing Home Info** (highlighted with a red box)
  - Work Order
  - Rx Counseling History



2. The **NH Rx Information** screen will appear. Complete the following:

- Ensure the **Unit Dose** flag is enabled
- Enter any dosing information that pertains to the Rx
- Select a dosing **Frequency** from the dropdown menu
- Complete the dosing chart

NOTE: Each card can only hold a certain number of medications, depending on the compliance packaging you use; therefore, you way with the manually allocation which medication you would like to print on which card pilpak. If you do not manually allocate the specific car number of the medication to be contained in, Kroll will default the **Card Number** to field to '1'.