

Medication Reviews

Alberta



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Medication Reviews - Alberta

This document outlines how to configure Medication Review functionality in Kroll and the process of completing Medication Reviews for both paper based and electronic records.

Configuration

This section explains the configuration settings that must be in place before attempting to use the Medication Review functionality.

Configuring Electronic Signatures

NOTE: Only complete this section if you are using Electronic Signature pads.

Before you can begin configuring electronic signatures, **Allow Electronic Signatures** must be enabled in **File > Configuration > Kroll > Configuration**. This will require a support call and must be completed before proceeding.

| ĺ | or Kroll Configuration Parameters | |
|---|-----------------------------------|---|
| l | General Configuration Modules | [herapeutic Advisor Station Logging |
| l | Allow Electronic Signatures | Follow Provincial Legislative Rules for Rx Transfer |
| | Enable Set Laser labels Allow NDC | |
| L | | |

- 1. Go to File > Configuration > Store > General.
- 2. Place a checkmark next to Allow Electronic Signatures.

| ſ | 🥣 Store Level Co | nfigurat | tion Para | meters | | | | | | | | | | r III |
|---|---------------------------------|----------|-----------|--------|-----|---|-----------|----------|----------|---|-----------|----------------|----------------|----------|
| | General Patient | Drug | Doctor | Bx | FDB | Adjudication | Labels | Reports | Security | Interfaces | Order | X · AR | Y - To Do | 🗲 Ctrl 🔿 |
| | 📝 Allow User Cold | | | | A | lways Show Sc | an | | | 🛛 Display W | indow W | 'hen Serv | vices are Down | n |
| | Allow Column C Enable NH / b | | tion | | | Prompt to exit when closing fill application Use Unit Dose Packaging | | | | Use automatic capitalization Allow Electronic Signatures | | | | |
| | Default language English | | | | | ult area code | | | | 🗾 7 Enable Ctr | l-PrintSc | - reen to P | rint Screensho | ot |
| | Default Country Canada | | | | | Rx Transfer Sto e Information | res By St | ore Name | | • |) | | | |

3. Click **OK** to save the changes.



Configuring Electronic Medication Reviews

1. Go to File > Configuration > Store > Rx > Counseling > Med Reviews/Dialogs.

| Store Level Configuration Parameters | | r I I I I I I I I I I I I I I I I I I I |
|---|---|---|
| General Patient Drug Doctor R× FDB Adjudication | h Labels Reports Security Interfaces Order X-AR Y-ToDo | E Ctrl 🗲 |
| 1 - General 2 - Pricing 3 - Prompting 4 - Nursing Home 5 - Ba | ackground Rx Filling 6 - Workflow 7 - Counseling 8 - CeRx | |
| Rx Counseling | Automatic Patient Counseling | |
| Allow editing counseling time | 🔽 On New Rx | |
| Require Electronic Signature | Only flag if patient hasn't had the drug in the last 180 days | |
| Users Permitted to Finalize Accepted Counseling | 🔲 On Refills | |
| V Pharmacist | 🥅 On Drug Changes | |
| ☑ Pharmacist Intern ☑ Pharmacy Tech Student | Allow User to Turn OFF Automatic Counseling for an Rx | |
| Pharmacy Student Pharmacy Assistant | | |
| IT Support | | |
| Visible Tabs | | |
| 🔽 Hardcopy Tab 🛛 🔽 Rx Images Tab | | |
| 📝 Rx Tab 📝 Workflow Tab | | |
| 📝 Financial Tab 🛛 📝 Packaging Tab | | |
| | | |
| Med Reviews/Dialogs | | |
| Require Document Scan to Complete Paper Med Review | | |
| Enable Electronic Med Reviews | | |
| Require Electronic Signature | | |
| Allow Editing Counseling Time | | |
| | | |
| | | |
| Search OK | X Cancel | |
| | | |

- 2. In the **Med Reviews/Dialogs** area above, ensure the following options are set appropriately.
 - **Require Document Scan to Complete Paper Med Review**: this option allows you to complete paper-based Medication Review using the document scan functionality;
 - Enable Electronic Med Reviews: enabling this option allows you to use the electronic version of Medication Review;
 - **Require Electronic Signature**: enabling this option prompts for electronic signatures where necessary (only if you are using Electronic Signature pads).
 - Allow Editing Counseling Time: this option allows you to modify the system-calculated amount of time it took to complete the counseling session.
- 3. Click **OK**.



NOTE: If you turn off the **Require Electronic Signature** option and keep the other options enabled you will still be able to complete the reviews on-screen. However, you will need to print the report, in order to capture pen-to-paper signatures and then scan it back into the system before giving it to the patient.

Electronic Medication Reviews

This section explains how to perform an Electronic Medication Review. Ensure your system is configured for Electronic Medication Reviews before proceeding. See <u>Paper Medication Review</u> for information on the non-electronic process.

NOTE: The automatic prompts will not appear if the patient does not meet the criteria for a Medication Review. However, based on other available information and your professional judgement, you can determine whether the patient might benefit from a Medication Review and then manually create a Medication Review.

Configuring the Medication Review Prompt

The system prompts for Medication Review when the option **Prompt for Medication Review** is enabled under **File > Configuration > Store > Rx > Prompting**.

| v Store Level Configuration Parameters | |
|---|--|
| General Patient Drug Doctor Rx FDB Adjudication I | Labels Reports Security Interfaces Order X - AR Y - To Do 🗲 Ctrl 🔿 |
| 1 - General 2 - Pricing 3 - Prompting 4 - Nursing Home 5 - Back | ground Rx Filling 6 - Workflow 7 - Counseling 8 - CeRx |
| Prompt to use Drug Subs Automatically use Drug Subs Use Drug Subs when Batching Prompt If Doctor Refused Repeat When Cancelling Rx Prompt for Comments when Cancelling an Rx Always require comment Prompt for Comments when Inactivating an Rx Always require comment Prompt for Patient Counselling on new Rx Prompt to Batch NH Rxs Prompt for Patient Counselling as drug's Pack Size Prompt for Batch NH Rxs Prompt For Repeats When Copying an Rx Prompt For Repeats When Copying an Rx Prompt To Use Manual Price From Last Refill Remove Manual Price for Batched Rxs Prompt if Doctor Authorization Received for Narcotic Rxs Check for High Intensity Drugs Prompt if there is not enough inventory to fill the Rx Prevent Copying an Inactive Rx to a New Number Show local patient profile on fill Prompt to Copy' Mistake'' Rxs to a New Number Show thermal/dot matrix label config on autofill Prompt for Print Script Image for 1st Fill of an Unfilled Rx Prompt if Was Undeliverable when Cancelling an Rx | globnick Reminds 0 * WolkNow 0 * Constant Drug Programs Participate in the Rx Canada / Health Inform Program Participate in the Pharmacy Access program Use Station Name Subdirectories For Pharmacy Access Days Back: 365 Enable Rx Canada Program (RxGateway) Services Prompt to Enrol Patients in Refill Reminder or Auto Refill Program Prompt to Enrol Patients in Refill Reminder and Auto Refill Program Prompt to Enrol NH Patients in Refill Reminder and Auto Refill Program Prompt to Enrol NH Patients in Refill Reminder and Auto Refill Program Enrol Patients for Pickup Notification No Image: Prompt to copy workflow packaged info for cancel and refill Rxs Prompt to copy to new number if refilling an Rx with no repeats Prompt for Due Date on autofill batches Prompt for Tx comment on autofill batches Save Route code from Rx as default value if no default is set Ask Save Form code from Rx as default value if no default is set Ask Prompt for Medication Review Track Medication Review Track Medication Review |
| Search OK | X Cancel |



When the option '**Prompt for Medication Review**' is enabled, the system screens each patient for Medication Review eligibility every time an Rx is processed. If the patient is eligible, the user is prompted and presented with a number of options as shown below.

| Select an Option | | | | | | | | | |
|---|--|--|--|--|--|--|--|--|--|
| This patient may be eligible for the (SMMA) Initial Assessment Program. | | | | | | | | | |
| Add to Med Review Queue | | | | | | | | | |
| Do not prompt me until the next time the patient comes in. | | | | | | | | | |
| Do not prompt until | | | | | | | | | |
| Never Prompt for this patient | | | | | | | | | |
| Undecided | | | | | | | | | |

- Add to Med Review Queue: Selecting this option adds the Med Review record to the Medication Reviews queue which can be accessed from the Patient record or F9 Workflow. See section 'Completing Medication Reviews 'Saved for Later' for further details.
- **Do not prompt me until the next time the patient comes in**: This will suppress prompting for today. The next time the patient comes in to fill an Rx, you will be prompted for the Medication Review.
- **Do not prompt until**: This will allow you to dismiss the prompt for a specified number of days, or until a specified date, after which the prompt will appear.
- Never prompt for this patient: This will suppress any further prompts for this patient. This option is only available if the configuration option of Allow 'Never Prompt' for Medication Review is enabled.
- **Undecided:** The prompt will re-appear once again the next time a prescription is filled for the patient.



Creating an Electronic Medication Review (Manual)

- 1. Bring up the patient card using the **F3 Patient** search.
- 2. Select **Medication Review/Dialogs** from the right navigation pane.

| File Edit | File Edit Patient Profile Reports Utilities Cards Session Help | | | | | | | | | | |
|-------------------|--|----------------|----------|---------------|---------|------------|-------------------|-------------------|--------------|-----------------|---------------------------|
| F3 - Pa | F3 - Patient F5 - Drug F7 - Doctor F9 - Workflow F11 - Drop-off F12 - New Rx Alt-X - Start | | | | | | | | | | |
| <u>L</u> ast Name | Dukes | | First Na | ame George | | Salutation | - | OK | - V s | Save 🛛 🗙 Scan | Patient |
| Address 1 | 110 Bear | Street | | Phone Numb | ers (1) | F2 Ins De | Birthdate | | | 76 | [≫] Profile |
| Address 2 | Box 1260 | | | Description | Phone | | Age | | | | All Rxs |
| | | | 40 | Home | (403) | 762-1212 | Gender | h da la | _ | | Active Rxs |
| City | Banff | | AB 🔻 | | | | | | | image available | Active Rxs w/Passtimes |
| Postal | T1L 1A1 | Country Canada | · • | | | | Language | | - | | Refillable Rxs |
| Email | | | Send | Family Doctor | | | Height | 180 cm | | | Pricing Profile |
| Quick Code | | | | | | F2 Clear | | 78 kg | | Load Delete | e Not Disp./OTC Rxs |
| Comment Tenis | | C | | | | F2 Ins I | ABBC | | | | Rxs Filled in Error |
| Topic | | Comment | | | | | <u>P</u> lans (0) | | | F2 Ins D | Suspended Rxs |
| | | | | | | | SubPlar | Code Group | ID Client ID | Expiry | Perform FDB Analysis |
| | | | | | | | | | | | View |
| | | | | | | | | | | | Alternate Addresses |
| Allergies (0 |)) | Add Drug F2 | Ins Del | General Fam | | avs Commi | inications 0 | ther | | Ctrl 🤇 | Batches |
| | | | | | | | | | Charting | | |
| | Active V | | | | | | Conse | ent nt Unknowr | 1 | Consent | |
| Animal | | | | | | | Consent Onknown | | | | Credit Cards |
| | | | | Deceased On | | | | Unit D | | one> | Documents |
| Medical Co | onditions (1 |) F2(| Ins Del | Prescriptions | | | | Type Cycle | | one> 💌 | Medication Review/Dialogs |

3. The Medication Review profile will appear. Click N – New Review/Dialog.

| 𝝼 1-Patient - Dukes, | George | | | | | | |
|----------------------|-----------------|------------------------|------------------|---------------|---------------|---------------|------------------------|
| File Edit Patient | Profile Reports | Utilities Cards Sessio | on Help | | | | |
| F3 - Patient | F5 - Drug | F7 - Doctor | F9 - Workflow F1 | L1 - Drop-off | F12 - New Rx | Alt-X - Start | |
| Last Name Dukes | | First Name George | Salutation | _ | OK 🔗 Sa | ve 🗙 Scan | Patient |
| | | D.1.1/D.1.1 | E CLI E | | | | [⊗] Profile |
| N - New Review/I | - | Print/Reprint | F - Claim Fee | | ncel Claim | | All Rxs |
| F2 - View Details | D - | Pharmacist Decline | R - Patient Refu | sed | | | Active Rxs |
| Medication Review | s (0) | | | | | F2 Ins Del | Active its |
| Туре | | Status | Fee Status | , | Created 🔻 Cor | mpleted 🔺 | Active Rxs w/Passtimes |
| | | | | | | | Refillable Rxs |

4. The **Medication Review/Dialog** screen will appear. Select a review type from the dropdown menu and click **Perform Now**. If you wish to add to the Med Review queue in order to complete the Medication Review later, click **Save for Later**.

| 🐨 Medi | cation Review/Dialog | | Ē | 23 |
|--------|----------------------|----------------|----------|----|
| Туре | (SMMA) Initial Asse | ssment | | • |
| | Perform <u>N</u> ow | Save for later | X Cancel | |



5. The **Medication Review Rx Selection** screen will appear. Rxs under the **Pre-Selected** tab are selected by default; Rxs on the other tabs are not. Proceed through each tab and check the Rxs you want included in the report. When you are finished, click **OK**.

| Pre-Selected (3) | Other Rxs Unfills | Not Dispensed Discon | tinued |
|-------------------|-------------------|----------------------|----------------------|
| Rx Num | Drug | | Fill Date |
| ☑ 1000958 | Amoxicillin 50/ml | | 11-Jul-2014 |
| 1000957 | Prinivil 2.5mg | | 11-Jul-2014 |
| ☑ 1000956 | Synthroid 112mcg | | 11-Jul-2014 |
| Drug lines to use | | | lect All Select None |
| Drug line 1 Defa | ult | Drug line 2 Defau | lt 🗾 |
| | 🗸 ок | X Cance | |

6. The **(SMMA) Initial Assessment** screen will appear. Click **Next** to proceed through the tabs, completing the required fields as you go.

NOTE: The type of review that is displayed on screen depends on what type of review was selected in Step 4. In this example, the **(SMMA) Initial Assessment** screen appears.



Questions

The **Questions** tab includes a list of questions that the pharmacist is to ask the patient to better understand their situation. Answers are recorded by selecting the appropriate option from each dropdown menu.

| Questions Medical History Non-Prescription Medications Rxs From Other Pharmacies General Comments Pharmacist Comm | • |
|---|---|
| Date of last SMMA or Updated SMMA 05/04/2013 | ^ |
| Chronic Diseases - Ischaemic Heart Disease No | |
| Chronic Diseases - Hypertensive Disease No | |
| Chronic Diseases - Diabetes Mellitus Yes | E |
| Chronic Diseases - Heart Failure No | |
| Chronic Diseases - Mental Disorders No | |
| Chronic Diseases - Asthma No | |
| Chronic Diseases - COPD No | |
| Symptoms or signs to be treated | |
| | |
| Other health conditions that may affect the Clinical Pharmacist's decision | |
| | |
| | - |
| X Save for Later | |

Medical History

The **Medical History** tab displays the medications that have been selected on the **Medication Review Rx Selection** screen.

| Questions | Medic | al History | Non-Prescription Medications | Rxs From | Other Pharmacies | General Comments | Pharmacist Comments |
|-------------|----------|--------------------------|---|----------|------------------|------------------|---------------------|
| Patient Me | dical H | istory | | | | Ins Del | |
| Currently T | aking | - | nthroid 112mcg [KNO] | | Indications | | |
| Yes | _ | Dr. Moult Last Fill D | nd Tab Flint 112 rie, Filipe ate: 14-Jul-2014, Days Supply: 7 ABLET ONCE DAILY | | Comments | | |
| Currently T | aking | | rinivil 2.5mg [MSD] | | Indications | | |
| Yes 💌 | • | | rrie, Filipe iate: 14-Jul-2014, Days Supply: 3 ABLET EVERY MORNING | 0 | Comments | | |
| Currently T | aking | | oxicillin 50/ml [SNS] | | Indications | | |
| Yes | • | | rie, Filipe ate: 14-Jul-2014, Days Supply: 7 EASPOON(5ML)ONCE DAILY | | Comments | | |
| | | | | | | | |
| X Save f | or Late | r | | | | | Next |



For each medication listed:

- Note if the patient is currently taking the specified medications and select **Yes/No** from the dropdown list.
- Enter the reason for using the medication based on the patient's feedback in the **Indications** field.
- Enter any general comments in the **Comments** field.

Use the **Del** button to delete a record from the **Medical History** tab.

Non-Prescription Medications

The **Non-Prescription Medications** tab provides space to record any OTC/non-prescription medications the patient is taking.

Click Ins to add a non-prescription medication to the tab.

| Questions | Medical History | Non-Prescription Medications | Rxs From | Other Pharmacies | General Comments | Pharmacist Comments |
|--------------------|------------------|------------------------------|----------|--------------------|------------------|---------------------|
| Non-Prescr | iption Medicatio | ns / Herbals / Supplements | | | | Ins Del |
| Currently T Yes | Claritin : | 10 mg | | For season allergi | es | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| X Save f | or Later | | | | | Next |

- Note if the patient is currently taking any OTC medications and select **Yes/No** from the dropdown list.
- Enter the name of the medication in the **Medication** field.
- Enter any appropriate comments in the **Comments** field.

Use **Del** buttons to remove any OTC items.



Rxs From Other Pharmacies

The **Rxs From Other Pharmacies** tab provides space to record medications that the patient is taking that were filled in other pharmacies.

Click **Ins** to add an Rx from another pharmacy.

| Questions N | /ledical History | Non-Prescription Medications | Rxs From | Other Pharmacies | General Comments | Pharmacist Comments | | |
|----------------------|------------------|---|----------|---|-------------------------------|---------------------|--|--|
| Prescriptions | From Other F | Pharmacies | | | | Ins | | |
| Currently Tak Yes | | # 3 - Take 1 to 2 tablets up to 4 en needed for pain | times a | From - Smith's Pharmacy - (555) - 123-4567 Possible duplication of therapy | | | | |
| Currently Tak Yes | cing Bisopro | olol 5mg - take 1 tablet daily | | From - Duncan Mi Duplication of the | ll Pharmacy - (555) - rapy | 555- 5555 | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| Save for | Later | | | | | Next | | |

- Note if the patient is currently taking any other medications and select **Yes/No** from the dropdown list.
- Enter the name of the medication in the **Medication** field.
- Enter any appropriate comments in the **Comments** field.

Repeat the same process for any Rx items that they have purchased from other pharmacies. Use **Del** buttons to remove any Rx items.



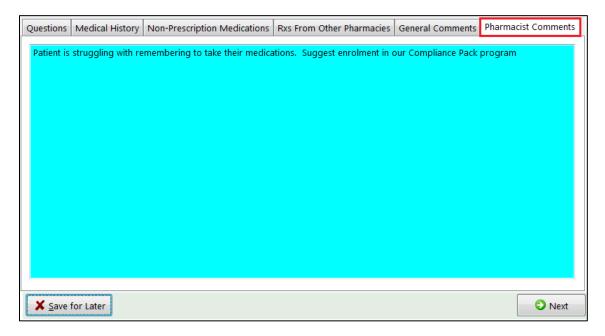
General Comments

The **General Comments** tab provides space to record any comments you want included on the report printout.

| Questions | Medical History | Non-Prescription Medications | Rxs From Other Pharmacies | General Comments | Pharmacist Comments |
|-------------|------------------|------------------------------|---------------------------|------------------|---------------------|
| Patient liv | es alone and doe | s not drive. | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| X Save | for Later | | | | Next |

Pharmacist Comments

The **Pharmacist Comments** tab provides space to record any comments that the pharmacist wishes to enter concerning the medication or patient in the free form.





Assessment

The **Assessment** tab provides space to record any comments that the pharmacist wishes to enter concerning the medication or patient in the free form.

| Non-Prescription Medications | Rxs From Other Pharmacies | General Comments | Pharmacist Comments | Assessment | 4 > |
|--------------------------------|----------------------------------|--------------------------|---------------------|------------|-----------|
| Drug Therapy Problem(s) and | Potential Adverse Events(if any) | | | | |
| Appropriate Response(s) to Dru | ug Therapy Problem(s) and Pote | ential Adverse Events(i† | any) | | |
| Agreed Goals Of Medication Th | herapy | | | | |
| Progress Monitoring Plan | | | | | |
| | | | | | |
| | | | | | |
| Save for Later | | | | 🛿 🕅 Finali | ze Review |

- 7. When you are finished click **Finalize Review**.
- 8. The **Medication Review** prompt will appear. If you have **Allow Editing Counseling Time** enabled, enter the amount of time it took to complete the review in the **Time spent** field.

The **Assessment Location** information is pre-populated with the pharmacy information. If the Medication Review was physically conducted in another location (LTC facility, patient's home) other than the pharmacy, enter the name of the location and the address. Complete the **Other Professional Involved** fields if another health professional assisted with the review.

When you are finished, click **OK**.



| of Medicati | on Review |
|-------------|--|
| Time spe | nt: 00:30 On 14/07/2014 By Pharmacist (P) 🗸 |
| Assessme | nt Location |
| Name | Kroll Pharmacy |
| Address | 220 Duncan Mill Road, Suite 201, Toronto, ON M3B 3J5 |
| Other Pro | fessional Involved |
| Name | Т |
| Title | Technician |
| Phone | |
| | ✓ OK X Cancel |

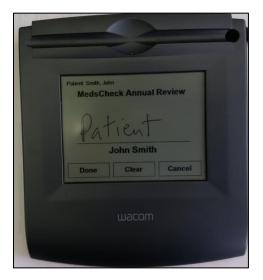
Affixing an Electronic Signature

NOTE: If you do not have an electronic signature configured, print the **Medication Review Report**, have both the patient and the pharmacist sign the report, and scan it back into the system.

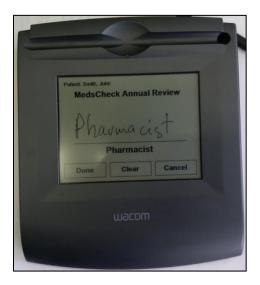
9. Have the patient sign his or her name on the electronic signature tablet. Click the **OK** button on the signature tablet.



The patient signature appears once the patient signs on the electronic signature tablet.



10. Have the pharmacist sign the electronic signature tablet.



11. When you are finished, tap **Done** on the signature tablet.

Printing a Medication Review

- 12. A prompt will appear asking if you want to print a paper copy of the electronic Medication Review. Click **Yes**.
- 13. The **Medication Review report** print form will appear. Select the appropriate print options and click **Print** and provide this copy to the patient.



Billing a Medication Review

14. Once printing is complete, the **Fee For Service** claim will automatically populate in the **F12** screen. If necessary, perform a doctor search to locate the pharmacist to use as the prescriber and ensure all of the other information entered on the **F12** screen is correct.

NOTE: If the user account of the pharmacist logged into the terminal during the processing of the Medication Review includes a license number that is identical to the license number of a Prescriber card in the Doctor file, then the Prescriber field on the **F12** screen for the claim will be populated with that prescriber.

15. Click **F12 - Fill Rx**. The claim will be transmitted to the appropriate party for payment.

| 🐨 1-New Rx for Dukes, George | | | | | | | | | | | |
|---|--|---------------------------------|--|--|--|--|--|--|--|--|--|
| File Edit Rx View Labels Profile Reports Utilities Cards Session Help | | | | | | | | | | | |
| F3 - Patient F5 - Drug | 7 - Doctor F9 - Workflow F11 - Drop-c | off F12 - Fill Rx Alt-X - Start | | | | | | | | | |
| 0 New Rx Pending Adj | First Fill Last Fill Information | \$0.00 Init 🚺 🖌 Lookup 🗶 Cancel | | | | | | | | | |
| Priority Default Wait Time F2 Due | in 19 mins Forward Rx F2 Work Order | 3 F2 Delivery Pickup 💌 | | | | | | | | | |
| Patient Search | Drug Search Pack 🚽 | Doc Search Loc Office | | | | | | | | | |
| Name Dukes, George Age:10 | Brand | Name Dr. Pharmacist, Test | | | | | | | | | |
| Address 110 Bear Street Male | Generic | Address 100 King Street | | | | | | | | | |
| City Banff Prov AB | Pack Form Sched | City Toronto Prov ON | | | | | | | | | |
| Phone Home (403) 762-1212 | Purch OnHand 0 No image | Phone (555) 555-5555 | | | | | | | | | |
| Plan Client ID | DIN Min Qty 0 | Lic# 12345 Alt. Lic# | | | | | | | | | |
| | | | | | | | | | | | |
| Allergies | Sig (SMMA) Initial Assessment | Init PM PM Auth Qty 0 | | | | | | | | | |
| | (SMMA) INITIAL ASSESSMENT | Disp Qty Refills(+) Rem Qty 0 | | | | | | | | | |
| | | Days 1 G.P. % 0 | | | | | | | | | |
| | | Prod Sel 3 - Pharma - Acq Cost | | | | | | | | | |
| Conditions | | Cost \$0.00 | | | | | | | | | |
| Asthma, unspecified, with stated status asthr | Route of Admin | Markup \$0.00 | | | | | | | | | |
| | | Labels 1 F2 Fee \$0.00 | | | | | | | | | |
| | Dosage Form | Total \$0.00 | | | | | | | | | |
| Plans Pricing Dates Comments Indication | Images Other Ctrl 🔿 Warnings Counselling | g Unit Dose (Ctrl-U): Disabled | | | | | | | | | |



Medication Review Options

Several Medication Review options are available from the right navigation pane on the **(SMMA) Initial Assessment** screen.

| <u>F</u> ile <u>E</u> | dit Med Revi | e <u>w V</u> iew <u>P</u> rofile | <u>U</u> tilities C | entr <u>a</u> l Fi | ll <u>C</u> ards | Session I | <u>H</u> elp | | | | | | |
|-----------------------|---|---|---------------------|--------------------|------------------|------------|---|------------|---------|----------|-----------------|---|---------------------------------|
| F3 - | Patient | F5 - Drug | F7 - Do | ctor | F9 - W | orkflow | F11 - Drop | -off | F12 - N | ew Rx | Alt-X - Start | | |
| (514) | MMA) Initial Assessment Reviewed With Doe, Jane (In Person) | | | | | | | | | | | | |
| | Print Medication Review | | | | | | | | | | | | |
| Patient | tient Doe, Jane Address 100 Yonge St Select Rvs for review | | | | | | | | | | | | |
| Birth | 01/01/1980 | 34 years | Female | Plan | ODB | Client ID | 1111 | | Phone | Cell | (555) 555-5555 | | View <u>F</u> ollow Ups |
| Allergie | argies Conditions View | | | | | | | | | | | | |
| | | | | | | | | | | | | | Patient Charting |
| | | | | | | | | | | | | | Patient <u>D</u> ocuments |
| | | | | | | | | | | | | | Patient <u>M</u> ed Reviews (8) |
| Quest | tions Medica | I History Non-Pre | scription M | ledicati | ons Rxs F | rom Other | r Pharmacies | General C | omment | ts Pharm | nacist Comments | | Profile |
| | | | | | | | | | _ | | | | All Rxs |
| Have | you received | a MedsCheck revie | w from and | other p | harmacy in | the last 1 | 2 months <n< td=""><td>ot Answere</td><th>ed> _</th><th></th><td></td><td>1</td><td>Active Rxs</td></n<> | ot Answere | ed> _ | | | 1 | Active Rxs |
| Med | ical Devices - | BP Machine <not< td=""><th>Answered></th><td>-</td><td></td><td></td><td></td><td></td><th></th><th></th><td></td><td>Ш</td><td>Active Rxs w/Passtimes</td></not<> | Answered> | - | | | | | | | | Ш | Active Rxs w/Passtimes |
| Med | ical Devices - | Glucometer <not< td=""><th>Answered></th><td>-</td><td></td><td></td><td></td><td></td><th></th><th></th><td></td><td></td><td>Pricing Profile</td></not<> | Answered> | - | | | | | | | | | Pricing Profile |
| Med | ical Devices - | Aero Chamber <n< td=""><th>ot Answere</th><td>ed> ▼</td><td></td><td></td><td></td><td></td><th></th><th></th><td></td><td></td><td>Not Disp/OTC Profile</td></n<> | ot Answere | ed> ▼ | | | | | | | | | Not Disp/OTC Profile |

Review

Print Medication Review

When this option is selected, the **Medication Review report** screen will appear, allowing you to set various print options. Configure the appropriate print options. Select **Preview** to view the report or **Close** to exit.

| 🐨 Medication Review Report ((SMMA) Initial Assessment, 2014-Aug-06) |
|---|
| File |
| Options |
| Print store logo Print Drug Manufacturer Print Pharmacist comment |
| Printer Copies 1 |
| Tray 🗸 Collate 🗖 Duplex |
| Restore Defaults |



Select Rxs for review

If you wish to add/edit Rxs on the Medical History tab, click the button Select Rxs for review. When selected, the **Medication Review Rx Selection** screen will appear, allowing you to add and remove items from the **Medical History** tab on the **Medication Review Annual Review** screen. Click **OK** to save any changes and **Cancel** to close the screen.

| | Other Rxs Unfills No | ot Dispensed | Discontinued | |
|---|------------------------------------|--------------|--------------|------------------------|
| Rx Num | Drug | | Fil | Date |
| 10009621000961 | Synthroid 112mcg Prinivil 2.5mg | | | -Jul-2014 -Jul-2014 |
| ☑ 1000960 | Amoxicillin 50/ml | | 14 | -Jul-2014 |
| | | | | |
| | | | | |
| | | | Select All | Select None |
| | se in review | | | |

View Follow Ups

When this option is selected, the **Medication Review Follow-ups** screen will appear, allowing you to create follow-up reviews for the patient.

NOTE: This is something that you initiate to follow up with the patient after the Medication Review has been completed. This is **NOT** a Medication Review Followup review.

| 🐨 Medica | tion Review Follow-ups | | | | | | x |
|-----------|---------------------------|---------|-----------|----------|-------|------------|----------|
| Medicat | tion Review | | | | | Print Repo | ort |
| Туре | (SMMA) Initial Assessment | Complet | ed On 06, | /08/2014 | | | |
| Patient | Dukes, George | Complet | ed By PN | ٨ | | | |
| Follow-up | is (0) | | | | | F2 Ir | ns (Del) |
| Due Date | Reason | | Brand Nar | me | RxNum | Resolved | ^ |
| | | | | | | | |
| | | | | | | · | |



To add a follow-up, click **Ins** and complete the **Medication Review Follow-up** screen. When you are finished, click **Save**.

| Medicat | tion Review | | |
|---------|---------------------|--------|--------------|
| Туре | (SMMA) Initial Asse | ssment | Completed On |
| Patient | Dukes, George | | Completed By |
| O Do r | not follow up | | |
| Follo | ow up required in | days = | |
| Reason | Unknown | | • |
| Comm | nent | | |
| | | | |
| Comn | esolved on | by | |
| | | | |
| | | | |

View

Patient Charting

When this option is selected, the **Patient Charting** form will appear, displaying information about the patient's weight, height, blood pressure, blood sugar, and so on.

| 50 7 | | Blood Pressure | Blood Sugar | Cholesterol | Creatinine CL | INR | Clozaril | | 🧲 Ctrl 🛛 |
|-------------|-------------|-------------------------|--------------------|--------------------|------------------------|-----------|------------|--------|-----------|
| | | | | | We | ight | Values (3) | | F2 Ins De |
| | | | 3 | | | _ | Date | Weight | - |
| 40 | | | | | | | 15/01/2013 | 65 | Π |
| 30 | | | | | | | 10/01/2012 | | |
| 20 | | | | | | | 08/01/2011 | | |
| 00 | 1 | | | | | | 00/01/2011 | | |
| 30 | | | | | | | | | |
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| 50 | | | | | | | | | |
| 0 | | | | | | | | | |
| 20 | | | | | | | | | |
| 10 | | | | | | | | | |
| 0 | | | | | | | | | |
| | 01Mar11 01M | 1ay11 01Jul11 01Sep11 0 | 1Nov11 01Jan12 01N | lar12 01May12 01Ju | ult2 01Sep12 01Nov1 | 2 01Jan13 | | | |
| Print | | | | | | 🗙 Canc | | | |



Use the **F2**, **Ins**, and **Del** buttons to modify, insert, or delete information on this screen. Click **Print** to print or **Cancel** to close the screen.

Patient Documents

When this option is selected, the **Patient Document List** will appear displaying a list of documents associated with the patient.

| Patient Document List | | | | | | | | x |
|---------------------------|---|----------------------|--------|---------------|------------|--------|----------------|-----|
| 1 | * | Add <u>N</u> ew Docu | ment ' | ▼ | | × | Cl <u>o</u> se | 9 |
| Documents (1) | | | | | | | F2 Ins | Del |
| Title | | | Init | Document Type | Created 🔻 | Retain | Until | × |
| (SMMA) Initial Assessment | | | PM | Manual Import | 20/08/2014 | | | |
| | | | | | | | | |

Use the **F2**, **Ins**, and **Del** buttons to modify, insert, or delete a patient document. Click **Close** to exit the screen.

Patient Medication Reviews

When this option is selected the **Patient Medication Reviews and Dialogs** screen will appear, displaying a history of all reviews for the patient including any that are currently in the Medication Review queue.

| Patient Medication Reviews a | nd Dialogs | No. Partness, Las | | web. Pharman | of Lances | | C - | |
|------------------------------|------------|----------------------|----------|---------------|----------------|------------|------------|-----------|
| N - New Review/Dialog | P - Pri | nt/Reprint | F - Call | up | C - Cancel Cla | im | | 🗙 Close |
| F2 - View Details | D - Ph | armacist Declined | R - Pati | ent Refused | | | | |
| Medication Reviews (1) | | | | | | | | F2 Ins De |
| Туре | | Status | | Fee Status | | Created 🔻 | Completed | |
| (SMMA) Initial Assessment | | Completed Electronic | | Pending Claim | | 06/08/2014 | 06/08/2014 | |

Double-click a Medication Review to view its details. Click **Close** to exit the screen.

Profile

The **Profile** menu on the **(SMMA) Initial Assessment** screen is identical to the **Profile** menu on the patient profile. This menu allows you to view **All Rxs**, **Active Rxs**, **Active Rxs w/ Passtimes**, **Pricing Profile**, and **Not Disp/OTC Profile**.



Completing Medication Review 'Saved for Later'

1. To call up Medication Reviews '**Saved for Later**' or added to the Med Review Queue via auto prompting, do one of the following:

Patient Card

- a) Bring up the patient card using the **F3 Patient** search and select **Medication Review/Dialogs** from the right navigation pane.
- b) The Medication Reviews queue will appear. Select the Medication Review record you want to complete and click **F Call Up**.

| File Edit Patient Profile Reports | Utilities Cards Session Help | | | |
|---|-------------------------------|--------------------------|---------------------------|------------------------|
| F3 - Patient F5 - Drug | F7 - Doctor F9 - Workfl | ow F11 - Drop-off F | 12 - New Rx Alt-X - Start |] |
| Last Name Dukes | First Name George Sal | utation V | Save 🗶 Cancel | Patient |
| | [⊗] Profile | | | |
| - | - Print/Reprint F - Cal | · · | laim | All Rxs |
| F2 - View Details D Medication Reviews (2) | - Pharmacist Declined R - Pat | ient Refused | (F2)(Ins)(Del | Active Rxs |
| Туре | Status | Fee Status | Created T Completed | Active Rxs w/Passtimes |
| (SMMA) Initial Assessment | Pending | Review Not Completed Yet | 06/08/2014 | Refillable Rxs |

F9 - Workflow

- a) Select **F9 Workflow** from the **Alt-X Start** screen and select **Medication Reviews** from the right navigation pane.
- b) The Medication Review queue will appear. Select the Medication Review you want to complete and click **F Call Up**.

| File Edit Utilities NH Workflow Cards Session Help | | | | | | | | | |
|--|-----------------------------|-------------------|--------------------------|------------------------|---------------------------------|--|--|--|--|
| F3 - Patient F5 | 5 - Drug F7 - Doctor F9 - W | orkflow F11 - Dr | rop-off F12 - New I | Alt-X - Start | | | | | |
| | P - Print/Reprint | F - Call up | C - Cancel C | laim 🔁 <u>R</u> efresh | [⊗] Workflow Actions | | | | |
| Medication F | Xeviews D - Pharmacist Dec | lined R - Patient | Refused space - Marl | (Rxs | Rx's To Do | | | | |
| Patient | Туре | Status | Fee Status | Created Completed | Rx's In Progress | | | | |
| Dukes, George | (SMMA) Initial Assessment | Pending | Review Not Completed Yet | 07/08/2014 | Pending Adjudication (0) | | | | |
| | | | | | <u>T</u> rouble (0) | | | | |
| | | | | | Rx Counseling (2) | | | | |
| | | | | | Medication Revie <u>w</u> s (9) | | | | |
| - | | | | | | | | | |

2. Complete steps 3-8 of the Creating an Electronic Medication Review section.



Sample Electronic Medication Review Report

| | | | | A data a a | | | | | | |
|---|----------------|---|---|---|-----------------------------------|--|--|--|--|--|
| Personal Medication Reco Dukes, George | rdof | | | Address 110 Bear Street, Banff AB T1L 1A1 | | | | | | |
| DOB | Gender | Alberta Personal Health Care Card Numbe | er | Phone | Date of last SMMA or Updated SMMA | | | | | |
| 01-Apr-1908 | м | | | (403)762-1212 | 05-Apr-2013 | | | | | |
| Allergies | | | | Conditions | | | | | | |
| N/A | | | | Asthma,unspecified,withstatedstate | usasthmaticus | | | | | |
| Chronic Diseases - Hy | pertensive Dis | ease | | Listof Schedule1 Drugs and/or Insulin | | | | | | |
| Chronic Diseases - Dia | betes Mellitus | 3 | | Paxil | | | | | | |
| Chronic Diseases - CO | PD | | | | | | | | | |
| Chronic Diseases - As | thma | | | | | | | | | |
| Chronic Diseases - He | art Failure | | | | | | | | | |
| Chronic Diseases - Iso | haemic Heart | Disease | | | | | | | | |
| Chronic Diseases - Me | ntal Disorders | | | | | | | | | |
| Symptomsorsignstobe Treatmenthistoryforthe | | cludingdrugtherapyandoutcomes | | | | | | | | |
| Otherhealthcareproduc | tsaidsandd | evicesorotherproductsbeingusedthat | mayaffecttl | eClinicalPharmacist'sdecision | | | | | | |
| | | | - | | | | | | | |
| Otherhealthconditions | hatmayaffe | ttheClinicalPharmacist'sdecision | | | | | | | | |
| Lifestylefactorswhichr | nayaffectdru | gtherapy,includingbut notlimited tocaf | feine,tobac | co,alcoholusage | | | | | | |
| Anyotherhealthinfomat | ionthatarea | sonableClinicalPharmacistwouldrequir | retoperform | thePharmacyService | | | | | | |
| | | | o Has a CACP been completed for this Resident in this Service Year Yes No | | | | | | | |
| Has a CACP, SMMA or Ph | sician CPP e | ver been completed for this Resident | Yes A | 6 Has a CACP been completed for this Resk | tent in this Service Year Yes No | | | | | |



(SMMA) Initial Assessment

| | Strength | Form | Prescriber | Qty | Fill Date | DirectionsforUse | IndicationforUse |
|-----------------------------|------------------|---------|---------------------------|--------|-------------|--------------------------|------------------|
| Xanax | 1mg | TAB | Dr. Moultrie, Felipe | 10 | 06-Aug-2014 | TAKE 1 TABLET ONCE DAILY | |
| Paxil | 10mg | TAB | Dr. Moultrie, Felipe | 10 | 06-Aug-2014 | AS DIRECTED | |
| DrugTherapyProblem(s)andPo | | | | | | | |
| AppropriateResponse(s)toDru | IgTherapyProblem | (s)andP | otentialAdverseEvents(ifa | ny) | | | |
| AgreedGoalsOfMedicationThe | rapy | | | | | | |
| ProgressMonitoringPlan | | | | | | | |
| Generationments | | | | | | | |
| General comments | | | | | | | |
| Pharmacistomment | | | | | | | |
| Pharmacist comments | | | | | | | |
| | | | | | | | |
| OCATION OF THE ASSES | SMENT | | | | Address | | |
| | | | | | | | |
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| | | | | | | | |
| | | | | Page 2 | of 3 | | |



| (SMMA) Initial Assessment | | |
|--|------|---------------------|
| /Updated SMMA with the Clinical Pharmacist who prepared it; ential risks of the medication therapy as outlined in this SMMA/Updated SMMA; and | | |
| Dukes, George | Date | - |
| assessment on Dukes, George for the purpose of preparing, documenting n accordance with the requirements set out in the Compensation Plan for Pharmacy Services | | |
| 'thomas l | | _ |
| Kroll Registration#:123124515 NCAdditionaPrescribingAuthority | Date | |
| | | |
| | | |
| | | |
| Page 3 of 3 | | 新260年 末回び 法記念 |



Viewing a Completed Medication Review

With Electronic Signatures Enabled

- 1. Bring up the patient card using the **F3 Patient** search.
- 2. Select Medication Review/Dialogues from the right navigation pane.
- 3. Highlight the completed Medication Review and click F2 View Details.

| ♂ 1-Patient | t - Dukes, George | | | | | | | | | |
|-------------------|--|---|---------------|----------------------------------|--------------|-----------|------------|------------------------|--|--|
| File Edit | File Edit Patient Profile Reports Utilities Cards Session Help | | | | | | | | | |
| F3 - Pat | tient F5 - Drug | F7 - Doctor F9 - | Workflow | F11 - Drop-off | F12 - New Rx | Alt | -X - Start | | | |
| <u>L</u> ast Name | Dukes | First Name George | Salutation | _ | ок 🗸 | Save | X Cancel | Patient | | |
| | | [⊗] Profile | | | | | | | | |
| | | • | F - Call up | | icel Claim | | | All Rxs | | |
| F2 - View | | Pharmacist Declined | R - Patient R | efused | | | | Active Rxs | | |
| Medication | n Reviews (2) | | | | | | F2 Ins Del | Active tos | | |
| Туре | | Status | Fee S | tatus | Created 🔻 | Completed | · | Active Rxs w/Passtimes | | |
| (SMMA) Initi | ial Assessment | Pending | Review | Review Not Completed Yet | | | | Refillable Rxs | | |
| (SMMA) Initi | ial Assessment | Completed Electronic | Pendi | Pending Claim 06/08/2014 06/08/2 | | | | Distance Description | | |
| | | | | | | | | Pricing Profile | | |

4. The **(SMMA) Initial Assessment** screen will appear. Click the various tabs to see the Medication Review information that has been entered.

| Medication Rev | view View | | | | | E X | | | | |
|------------------------|---------------------------------|----------------------------|--|------------|-------------------------|----------------------|--|--|--|--|
| (SMMA) | (SMMA) Initial Assessment | | | | | | | | | |
| Created | 06-Aug-2014 12:04 PM | Status Complet | ted Electronic | Fee Status | Pending Claim | Fee Rx N/A | | | | |
| Started Reviewed By | 06-Aug-2014 12:04 PM Preetha | Completed Reviewed With | 06-Auq-2014 12:22 Dukes, George (In P | | tion 15 mins Vie | w Signatures Print | | | | |
| Questions | Medical History Gener | al Comments P | Pharmacist Comment | Non-Presc | ription Medications | Rxs From Other Pharm | | | | |
| Date of la | st SMMA or Updated SM | IMA 05/04/2013 | 3 | | | <u>^</u> | | | | |
| Chronic Di | iseases - Ischaemic Heart | Disease No | | | | | | | | |

5. Click **Print** to print the Medication Review, or **View Signatures** to view the pharmacist's or patient's electronic signature.

Scanned Reviews with Manual Signatures

- 1. Bring up the patient card using the F3 Patient search.
- 2. Select Medication Review/Dialogues from the right navigation pane.
- 3. Highlight the completed Medication Review and click **F2** View Details.



4. The **Medication Review View** screen will appear. The **Review** tab displays information entered on-screen during the Medication Review; the **Documents** tab displays the scanned image of the signed Medication Review. Scanned paper Medication Reviews is also viewable from Patient Documents.

| (SMMA) | Initial Asses | sment | | | | | Close |
|------------------------|--------------------|-----------------|----------------|-----------------------|------------|----------------------|---------------------|
| Created | 30-Jul-2014 02:25 | PM Status | Completed Ele | ectronic | Fee Status | Claimed | Fee Rx 108767 |
| Review Doc | uments | | | | | | |
| Started 30-Jul-2014 02 | | 25 PM Completed | | ul-2014 02:26 PM | Durat | ion 1m 0s View Si | gnatures Print |
| Reviewed By | Scott Belfer | Review | ved With Belfe | er, Scott (In Person) | | | |
| Questions | Medical History | Non-Prescript | tion Medicatio | ns Rxs From Othe | er Pharmac | ies General Comments | Pharmacist Comments |
| Have you | received a MedsC | heck review fro | om another ph | armacy in the last 1 | 12 months | No | ſ |
| Medical D | evices - BP Machin | ne Yes | | | | | |
| Madical D | evices - Glucomet | er Yes | | | | | |

5. Click **Print** to print the Medication Review.



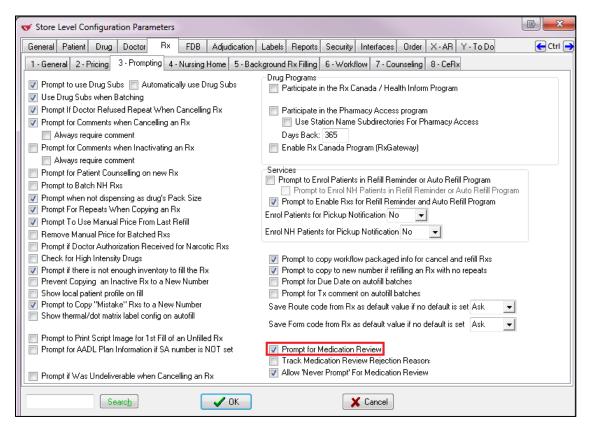
Paper Medication Reviews

This section explains how to perform paper Medication Reviews. Paper Medication Reviews must be completed on paper, signed, and scanned back into the system.

NOTE: The automatic prompts will not appear if the patient does not meet the criteria for a Medication Review. However, based on other available information and your professional judgement, you can determine whether the patient might benefit from a Medication Review and then manually create a Medication Review.

Configuring the Medication Review Prompt

The system prompts for **Medication Review** when the option **Prompt for Medication Review** is enabled under **File > Configuration > Store > Rx > Prompting**.





When the option '**Prompt for Medication Review**' is enabled, the system screens each patient for Medication Review eligibility every time an Rx is processed. If the patient is eligible, the user is prompted and presented with a number of options as shown below.

| Select an Option |
|---|
| This patient may be eligible for the (SMMA) Initial Assessment Program. |
| Print Report Now |
| Print Report Later |
| I have <u>O</u> ther Rxs to fill for this patient |
| Do not prompt me until the next time the patient comes in. |
| Do not prompt until |
| Never Prompt for this patient |

- **Print Report Now**: This will call up the Medication Review report so you can select the items you would like to print on the report.
- **Print Report Later**: This places a record in the Medication Review queue allowing you to print the Medication Review at a later date or time. See section '<u>Completing Medication</u> <u>Reviews 'Saved for Later'</u> for further details.
- I have Other Rxs to fill for this patient: This will allow you to continue filling more Rxs for the patient before printing the report.
- **Do not prompt me until the next time the patient comes in**: This will suppress prompting for today. The next time the patient comes in to fill an Rx, you will be prompted for the Medication Review.
- **Do not prompt until**: This will allow you to dismiss the prompt for a specified number of days, or until a specified date, after which the prompt will appear.
- Never prompt for this patient: This will suppress any further prompts for this patient. This option is only available if the configuration option of Allow 'Never Prompt' for Medication Review is enabled.



Creating a Paper Medication Review (Manual)

- 1. Bring up the patient card using the **F3 Patient** search.
- 2. Select **Medication Review/Dialogs** from the right navigation pane.

| File Edit | Patient | Profile Reports L | Jtilities | Cards Sessi | on Help | | | | | | | |
|------------------------------------|-------------------------------|-------------------|-----------|------------------------------|----------|------------|---------------|------------|----------------|--|----------------|---------------------------|
| F3 - Pa | tient | F5 - Drug | F7 | - Doctor | F9 - W | orkflow | F11 - Drop-o | ff F | 12 - N | lew Rx | Alt-X - Start | |
| <u>L</u> ast Name | Dukes | | First Na | me George | | Salutation | - | 0 | К | 🛛 🖉 Sa | ve 🗙 Scan | Patient |
| Address 1 | 110 Bear | Street | | Phone Numb | ers (1) | F2 Ins | Del Birthdate | | | | | [⊗] Profile |
| Address 2 | Box 1260 | | | Description | Phone | | Age | | | | | All Rxs |
| | | | | Home | (403) | 762-1212 | | | | | | Active Rxs |
| City | Banff | | 4B ▼ | | | | Gender | Male | - | No ir | mage available | Active Rxs w/Passtimes |
| Postal | T1L 1A1 | Country Canada | _ | | | | Language | English | • | | | Refillable Rxs |
| Email | | | Send | Family Doctor | | | Height | 180 cm | | | | Pricing Profile |
| Quick Code | | | | | | F2 Cle | ar Weight | 78 kg | | | Load Delete | Not Disp./OTC Rxs |
| _ | Comments (0) [2] Ins (b) ABBC | | | | | | | | | | | |
| Topic Comment Plans (0) F2 Im3 (0) | | | | | | | | | Suspended Rxs | | | |
| | | | | | | | SubPla | n Code Gro | up ID | Client ID | Expiry | · · |
| | | | | | | | | | | | | Perform FDB Analysis |
| | | | | | | | | | | | | View |
| | | | | | | | | | | | | Alternate Addresses |
| Allergies (|)) | Add Drug F2 In | is Del | G <u>e</u> neral <u>F</u> am | | avs Comm | unications (| Other | | | Ctrl 🗖 | Batches |
| | | | | Patient | my cop | | | | | | C C C | Charting |
| | | | | Active | | | | | nsent nsent | Unknown | | Consent |
| | | | | Animal | | | | | | | | Credit Cards |
| | | | | Deceased On | | | | | it Dose | | | Documents |
| Medical Co | onditions (1 |) F2 In | is Del | Prescriptions | | | | | pe cle | <nor< td=""><td></td><td>Medication Review/Dialogs</td></nor<> | | Medication Review/Dialogs |

3. The Medication Review queue will appear. Click N – New Review/Dialog.

| File Edit Patient | Profile Reports | Utilities Cards Sessi | on Help | | | | |
|--|-----------------|-----------------------|-----------------|----------------|---------------|---------------|------------------------|
| F3 - Patient | F5 - Drug | F7 - Doctor | F9 - Workflow | F11 - Drop-off | F12 - New Rx | Alt-X - Start |] |
| Last Name Dukes | | First Name George | Salutation | - | ок 🖉 Sar | /e 🗙 Scan | Patient |
| - | | | | | 1.01.1 | | [⊗] Profile |
| N - New Review/D | | Print/Reprint | F - Claim Fe | | ncel Claim | | All Rxs |
| F2 - View Details Medication Review | | Pharmacist Decline | d R - Patient R | efused | | (F2) Ins Del | Active Rxs |
| Туре | s (0) | Status | Fee S | tatus | Created 🔻 Con | | Active Rxs w/Passtimes |
| | | | | | | | Refillable Rxs |

4. The **Medication Review/Dialog** screen will appear. Select a review type from the dropdown menu and click **Print Now**. If you wish to add to the Med Review queue in order to print the Medication Review later, click **Save for Later**.

| 🐨 Medi | cation Review/Dialog | | Ē | x |
|--------|----------------------|----------------|----------|----------|
| Туре | (SMMA) Initial Asse | essment | | - |
| | <u>P</u> rint Now | Save for later | X Cancel | |



5. The **Medication Review Rx Selection** screen will appear. Rxs under the **Pre-Selected** tab are selected by default; Rxs on the other tabs are not. Proceed through each tab and check the Rxs you want included in the report. When you are finished, click **OK**.

| Medication Review | v Rx Selection | | | |
|---|-------------------------------------|---------------|--------------|----------------------------|
| Pre-Selected (3) | Other Rxs Unfills | Not Dispensed | Discontinued | |
| Rx Num | Drug | | | Fill Date |
| 10009581000957 | Amoxicillin 50/ml Prinivil 2.5mg | | | 11-Jul-2014 11-Jul-2014 |
| № 1000957№ 1000956 | Synthroid 112mcg | | | 11-Jul-2014 |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | Select All | Select None |
| | | | Select All | Select None |
| Drug lines to use | in review | | | |
| Drug line 1 Defa | ult | ▼ Drug line : | 2 Default | • |
| | 🗸 ок | | Cancel | |

- 6. The **Medication Review Report** form will appear. Select the appropriate print options and click **Print**. The report will generate.
- 7. Complete the Medication Review on the form. Sign the **Medication Review Report** and have the patient do the same.



Scanning Medication Review Reports

8. From the Alt-X Start screen, go to Utilities > Printed Document Scan/Import.

| File Edit Reports | Utilities Central Fill Cards Session | Help | Version 10 |
|--|---|------|--|
| F3 - Patient | Drug Ordering | | rkflow F11 - Drop-off F12 - New Rx Alt-X - Start |
| | Merge Unmerge | | |
| Last Rx Numbers Regu <u>l</u> ar 1000 | Adjust Current Wait Time Check Interactions | | |
| <u>N</u> arcotic 9000 | Quick Price | Alt+ | Followups Notes Inbound Docs Outbound Fax Mail |
| <u>M</u> odify R: <u>R</u> eprint R | View Mail/Messages View Packager Batches | | |
| Cancel Ro | Labels | | 0-1 hrs 1-4 hrs 4+ hrs Tomorrow Trouble Total |
| Modify Specifi | Script Reentry Mode | | 0 0 0 0 0 4 Rx Counts |
| Reprint Specifi Counsel R | Database Maintenance | | New Rxs 0 0 0 0 0 4 Repeat Rxs 0 Total Rxs 0 0 0 0 0 0 0 |
| | Drug Patient/Rx Import Drieted Descent Second | | Details |
| | Printed Document Scan/Import | | |

9. The **Import Scanned Documents** screen will appear. Place the report pages face down on the scanner hopper. Check **Scan both sides of paper** if you are scanning pages with information on both sides and your scanner supports dual side scanning. Click **Start Scanning**.

| Import Scanned Documents | EX |
|--|--|
| Scanner Scanner FUJITSU fi-6130dj Mode Colour Resolution 100 | <u>Start Scanning</u> Scan both sides of paper |
| Document Processing To Process 0 To Reconcile 0 | Process and Reconcile |
| View Scan <u>H</u> istory | X Close |



10. When scanning is complete, the screen will indicate how many pages were scanned successfully and how many will need to be manually reconciled. When you are finished, click **Process and Reconcile**.

| Import Scanne | d Documents | |
|---------------|---------------------------|------------------------------|
| Scanner | | |
| Scanner | FUJITSU fi-6130Zdj #2 | Start Scanning |
| Mode | Colour | |
| Resolution | 100 | Scan both sides of paper 📃 |
| Document | | [] |
| To Process | - | <u>Process and Reconcile</u> |
| To Reconci | le 0 | |
| | View Scan <u>H</u> istory | X Close |

11. The **Document Scan Reconciliation** screen will appear. Items ready to be processed will appear in the **Documents to be created** section. Items that need to be reconciled will appear in the **Unprocessed Images** section.

| Document Scan Reconciliation | | | | |
|--|--|--|---|-----------------------------------|
| Documents to be created (1) Scanned on Status Filed By | Type Title | Patient | Rx Num Pages Message | |
| 11/07/2014 12:31:43 Ready To File | Patient Med Review | Doe, Jane | nx Nulli Pages Message | î |
| Thomas I neady to be | I COSTR MED THEY | 200, 3010 | | E Process Pending Documents |
| 🖬 🥩 🗷 Zoom 50.0 % 🔍 🍳 📔 📑 | 0 8 6 5 | | Unprocessed Images | (0) Current Document |
| | | | Document Images (2) | |
| (ЯМНА) Іл | itialAssessment | | Scanned On Type 12:31:43 Patient Med 12:31:45 Patient Med | |
| Personal NedicationRenortor Dukes, George | Addess 110 Bear Street, Barff AB TIL IA1 | | | |
| DC8 Center N Alteria PersonalHealthCaw CardNumber | Phone (433) 762-1212 Dath of last : | SidiAl or Updated SidiA 05-Apr-2013 | | E |
| N/A | Asthma,unspecified,withstate/status-asthmaticus | | | |
| Chronic Deases - Joydrafelia Clease Chronic Deases - Solid Hilling Chronic Deases - Solid Hilling Chronic Deases - Adventic Houses Chronic Deases Chronic Deases - Adventic Houses Chronic Deases C | Listof Schoduler Drugs and Gritssuin Faxi | | | |
| NFORMATION FOR ASSESSMENT Symptomicrosignitoleticated | | | E | |
| Treatmesthistoryforthecondition,including/rugtherapyandou/comes | | | | |
| Dthemealthcare products ald sanddevices or other product sibeing used that may all eco | theClinicalPharmucist'sSecision | | Document Type Pati | ent Med Review |
| Otherhealth:conditionsthatmayaffecttheClinicalPharmacisTsdecision | | | | |
| Life style actors which may affected ug the rayy, including but not imited to caffeine, to be | | | Patient | F3 |
| AnyothemealthinformationthatareascnableClinic#Pharmacistwouldrequiretoperfo | | | Name Doe, J Address 200 M | |
| Has a CACP, SMIA or Physician CPP ever been completed for this Rosiden: 363 Have copies been obtained 548 | Ng Pasa-CACP been conpileed for this Resident in this Servic No | te Year Y63 H0 | City, Prov Banff | |
| , | leger 5 of 3 | | Med Review 11/07/2014 - (SMA) Ini | tial Assessment (Printed Paper) 💌 |
| Brightness | Contrast | Saturation | | Aline |
| 0 | 0 | 0 | X Cancel | 🗸 Next |



12. If all Rxs were scanned successfully and appear in the **Documents to be created** section, click the **Process Pending Documents** button. Click **Cancel** to close the screen.

Billing a Medication Review

- 13. Once scanning is complete, the **Fee For Service** claim will automatically populate in the **F12** screen. If necessary, perform a doctor search to locate the pharmacist to use as the prescriber and ensure all of the other information entered on the **F12** screen is correct.
- 14. Click **F12 Fill Rx**. The claim will be transmitted to the appropriate party for payment.

Completing Medication Review 'Saved for Later'

1. To call up Medication Reviews 'Saved for Later', do one of the following:

Patient Card

- a) Bring up the patient card using the **F3 Patient** search and select **Medication Review/Dialogs** from the right navigation pane.
- b) The Medication Reviews will appear. Select the Medication Review record you want to complete and click **F Call Up**.

| File Edit | Patient Profile Reports | Utilities Cards Session | Help | | | |
|------------------------|----------------------------|-------------------------|------------------------------|---------------------|------------|------------------------|
| F3 - Pa | tient F5 - Drug | F7 - Doctor | F9 - Workflow F11 - Drop-off | F12 - New Rx Alt-X | - Start | |
| <u>L</u> ast Name | Dukes | First Name George | Salutation | OK 🖉 Save 🕽 | Cancel | Patient |
| - | | | [⊗] Profile | | | |
| | · · | - Print/Reprint | | ncel Claim | | All Rxs |
| F2 - View Medicatio | Details D n Reviews (2) | - Pharmacist Declined | R - Patient Refused | | F2 Ins Del | Active Rxs |
| Туре | | Status | Fee Status | Created 🔻 Completed | | Active Rxs w/Passtimes |
| (SMMA) Init | ial Assessment | Pending | Review Not Completed Yet | 06/08/2014 | | Refillable Rxs |

F9 - Workflow

- a) Select **F9 Workflow** from the **Alt-X Start** screen and select **Medication Reviews** from the right navigation pane.
- b) The Medication Review queue will appear. Select the Medication Review you want to complete and click **F Call Up**.

| File Edit Utilities NH Workflow Cards Session Help | | | | | | | | | |
|--|---|------------|---------------|---------------------|-------------------|------------|---------------|--------|-----------------------|
| F3 - Patient | F5 - Drug F | 7 - Doctor | F9 - Workflow | F11 - Drop-off | F12 - New | Rx / | Alt-X - Start | | |
| NA 11 11 | A de l'anctine De la Print/Reprint F - Call up C - Cancel Claim 🔁 Refresh | | | | | | | ₩o | rkflow Actions |
| Medicati | on Reviews | D - Pharma | cist Declined | R - Patient Refused | space - Marl | | | Rx's | To Do |
| Patient | Туре | | Status | Fee Sta | us | Created | Completed | Rx's I | in Progress |
| Dukes, George | (SMMA) Initial Asses | sment | Pending | Review | Not Completed Yet | 07/08/2014 | | Pend | ling Adjudication (0) |

2. Complete steps 4-14 of the <u>Creating a Paper Medication Review</u> section.



Sample Paper Medication Report

| (| (SMMA) |) Initial | Assessment |
|---|-------------|-----------|------------|
| | Constraint, | / | ASSESSMENT |

| Personal Medication Record of Dukes, George | Address 110 Bear Street, Banff AB T1L 1A1 | | | | |
|--|--|-----------------------------------|--|--|--|
| DOB Gender Alberta Personal Health Care Card Number M | Phone (403) 762-1212 | Date of last SMMA or Updated SMMA | | | |
| Resident's Personal Representative Name | Representative Address | Representative Phone | | | |
| Allergies | Conditions | | | | |
| N/A | Asthma, unspecified, with stated st | atus asthmaticus | | | |
| Chronic Diseases - Hypertensive Disease | List of Schedule 1 Drugs and/or Insul | in | | | |
| Chronic Diseases - Diabetes Mellitus | Paxil | | | | |
| Chronic Diseases - COPD | | | | | |
| Chronic Diseases - Asthma | | | | | |
| Chronic Diseases - Heart Failure | | | | | |
| Chronic Diseases - Ischaemic Heart Disease | | | | | |
| Chronic Diseases - Mental Disorders | | | | | |
| Symptoms or signs to be treated Treatment history for the condition, including drug therapy and outcomes | | | | | |
| Other health care products aids and devices or other products being used that may affe | ect the Clinical Pharmacist's decision | | | | |
| Other health conditions that may affect the Clinical Pharmacist's decision | | | | | |
| Lifestyle factors which may affect drug therapy, including but not limited to caffeine, to | bacco, alcohol usage | | | | |
| Any other health infomation that a reasonable Clinical Pharmacist would require to per | form the Pharmacy Service | | | | |
| | | | | | |
| | | | | | |
| | | 2005 1916 | | | |



(SMMA) Initial Assessment

| Have copies been obtained | | | | Yes | No | | | |
|---|----------|------|----------------------|---------|-----|-------------|--------------------------|--------------------|
| • | | | | 1 | | | | |
| Product Name | Strength | Form | Prescriber | | Qty | Fill Date | Directions for Use | Indication for Use |
| Xanax | 1mg | TAB | Dr. Moultrie, Felipe | | 10 | 06-Aug-2014 | TAKE 1 TABLET ONCE DAILY | |
| Paxil | 10mg | TAB | Dr. Moultrie, Felipe | | 10 | 06-Aug-2014 | AS DIRECTED | |
| Drug Therapy Problem(s) and P Appropriate Response(s) to Dru | | | | s(if ar | ıy) | | | |
| Agreed Goals Of Medication Th | erapy | | | | | | | |
| Progress Monitoring Plan | | | | | | | | |
| | | | | | | | | |
| General Comments | | | | | | | | |
| | | | | | | | | |
| OCATION OF THE ASSES | OMENT | | | | | | | |
| Name | SMENT | | | | 4 | Address | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
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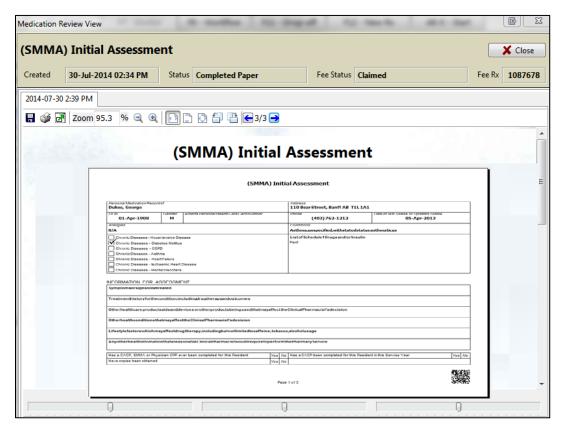


| | (SMMA) Initia | l Assessment | | |
|---|--|--------------|---------------|--|
| hereby confirm that:I have reviewed and discussed this SMI | ident's Personal Representative (if applicable) MA/Updated SMMA with the Clinical Pharmacist who prep- botential risks of the medication therapy as outlined in this SMMA/Updated SMMA. | | | |
| | | | Date | |
| | n Assessment on Dukes, George for the purpose of prepa IA in accordance with the requirements set out in the Com | | | |
| | | | | |
| | Kroll Registration #: Additional Prescribing Authority: | Yes No | Date | |
| OTHER PROFESSIONAL INVOLV | Registration #: Additional Prescribing Authority: | | | |
| OTHER PROFESSIONAL INVOLV Name | Registration #: Additional Prescribing Authority: | Yes No | Date Phone | |
| | Registration #: Additional Prescribing Authority: | | | |



Viewing a Completed Medication Review

- 1. Bring up the patient card using the F3 Patient search.
- 2. Select Medication Review/Dialogs from the right navigation pane.
- 3. Highlight the completed Medication Review and click **F2** View Details.
- The (SMMA) Initial Assessment screen will display the scanned image of the completed Medication Review. Scanned Medication Reviews are also viewable from Patient Documents.





Declined and Refused Medication Reviews

This section explains the process for recording Medication Reviews that have been declined by the pharmacist or refused by the patient.

NOTE: The medication review records that are declined by the pharmacist or patient refused can also be noted from the Medication Review queue on the F9-Workflow screen.

Pharmacist Declined

- 1. Bring up the patient card using the F3 Patient search.
- 2. Select Medication Review/Dialogs from the right navigation pane.
- 3. Select the appropriate Medication Review and click **D Pharmacist Declined**.

| 🐨 1-Patient - Dukes, George | | | |
|-----------------------------------|------------------------------|--------------------------|--------------------------|
| File Edit Patient Profile Reports | Utilities Cards Session Help | | |
| F3 - Patient F5 - Drug | F7 - Doctor F9 - Workflo | ow F11 - Drop-off F1 | 2 - New Rx Alt-X - Start |
| Last Name Dukes | First Name George Salu | utation 🗾 OK | Save 🔀 Cancel |
| N - New Review/Dialog P - | Print/Reprint F - Clai | im Fee C - Cancel Cl | aim |
| F2 - View Details D - | Pharmacist Declined R - Pat | ient Refused | |
| Medication Reviews (2) | | | F2 Ins Del |
| Туре | Status | Fee Status | Created 🔻 Completed |
| (SMMA) Initial Assessment | Pending | Review Not Completed Yet | 06/08/2014 |

4. Select the appropriate option from the **Decline/Refuse** prompt.

| 🐨 Select an O | ption | C X |
|---------------|---|-----|
| | Decline/Refuse - (SMMA) Initial Assessment. | |
| | Do not prompt until the next time the patient comes in. | |
| | | |
| | Do not prompt until | |
| | Neuro Decement for all is a stirut | |
| | Never Prompt for this patient | |
| | Cancel | |

- If you select **Do not prompt until the next time the patient comes in**, no further action is required until the next time the patient visits the pharmacy.
- If you select **Do not prompt until...** you will be prompted to specify the next time you want to be prompted for the patient's Medication Review. Complete the form and click **OK**.



• If you select **Never Prompt for this patient** you will not receive any additional Medication Review prompts for the patient.

Patient Refused

- 1. Bring up the patient card using the **F3 Patient** search.
- 2. Select **Medication Review/Dialogs** from the right navigation pane.
- 3. Select the appropriate Medication Review and click **R Patient Refused**.

| 👽 1-Patient - Dukes, George | | | | |
|-----------------------------------|------------------------------|--------------------------|--------------|---------------|
| File Edit Patient Profile Reports | Utilities Cards Session Help | | | |
| F3 - Patient F5 - Drug | F7 - Doctor F9 - Work | low F11 - Drop-off | F12 - New Rx | Alt-X - Start |
| Last Name Dukes | First Name George Sa | lutation 🗾 | OK 🛛 🖉 Sa | ve 🗙 Cancel |
| N - New Review/Dialog P | - Print/Reprint F - Cl | aim Fee C - Ca | ncel Claim | |
| F2 - View Details D | - Pharmacist Declined R - Pa | tient Refused | | |
| Medication Reviews (2) | | | | F2 Ins De |
| Туре | Status | Fee Status | Created 🔻 Co | mpleted 🖌 🔺 |
| (SMMA) Initial Assessment | Pending | Review Not Completed Yet | 06/08/2014 | |

4. Select the appropriate option from the **Decline/Refuse** prompt.

| ▼ Select an Option | |
|---|-----|
| Decline/Refuse - (SMMA) Initial Assessment. | |
| Do not prompt until the next time the patient comes i | in. |
| Do not prompt until | |
| Never Prompt for this patient | |
| Cancel | |

- If you select **Do not prompt until the next time the patient comes in** you will be prompted to specify if the review was declined by the **Patient** or **Someone Else**.
 - If you select Someone Else, the Medication Review/Dialog Refusal form will appear. Click the lookup button next to the Select agent field to search for the patient who refused the review. Select a relationship from the Relationship to patient menu and click OK.



| Medication Review/Dia | log Refusal | C X | | | |
|-------------------------------------|-------------|----------|--|--|--|
| Refused By 🔘 Patient 💿 Someone Else | | | | | |
| Select <u>ag</u> ent | Doe, Jane | - | | | |
| <u>L</u> ast name | Doe | | | | |
| <u>F</u> irst name | Jane | | | | |
| <u>R</u> elationship to patient | Daughter | • | | | |
| ✓ OK X Cancel | | | | | |

- No further action is required until the next time the patient visits the pharmacy.
- If you select **Do not prompt until...** you will be prompted to specify the next time you want to be prompted for the patient's Medication Review. Complete the form and click **OK**.
- If you select **Never Prompt for this patient** you will not receive any additional Medication Review prompts for the patient.

NOTE: Medication Review records that have been refused or declined cannot be deleted from the Medication Reviews queue.

Medication Review Statuses

This section explains the statuses that appear in the **Medication Review** queue at various stages throughout the Medication Review process.

Statuses

| <u>F</u> ile Edit Patient Profile Reports U | Itilities NH Cards Session He | lp | | |
|---|-------------------------------|--------------------------|---------------------------|------------------------|
| F3 - Patient F5 - Drug | F7 - Doctor F9 - Workf | low F11 - Drop-off F1 | 12 - New Rx Alt-X - Start | |
| Last Name Dukes | First Name George Sa | lutation 🗾 OK | Save X Cancel | Patient |
| | | | | [⊗] Profile |
| | Print/Reprint F - Ca | | laim | All Rxs |
| F2 - View Details D - I Medication Reviews (7) | Pharmacist Declined R - Pa | tient Refused | (F2) [Ins] [Del] | Active Rxs |
| Туре | Status | Fee Status | Created V Completed | Active Rxs w/Passtimes |
| (SMMA) Initial Assessment | Pending | Review Not Completed Yet | 19/08/2014 | Refillable Rxs |
| (SMMA) Initial Assessment | Printed Paper | Review Not Completed Yet | 31/07/2014 | |
| (SMMA) Initial Assessment | Completed Electronic | Pending Claim | 06/08/2014 06/08/2014 | Pricing Profile |
| (SMMA) Initial Assessment | Declined by Pharmacist | No Fee Applicable | 11/07/2014 11/07/2014 | Not Disp./OTC Rxs |
| (SMMA) Initial Assessment | Refused by Patient | No Fee Applicable | 19/08/2014 19/08/2014 | Rys Filled in Error |

Pending

Reviews that have been initiated but have not yet been completed.

Printed Paper

Reviews that have been printed but have not yet been billed.



Completed

Reviews that have been printed and billed.

Declined by Pharmacist

Reviews that have been declined by the pharmacist.

Refused by Patient

Reviews that have been refused by the patient.

Fee Statuses

| <u>Eile Edit Patient Profile R</u> eports <u>U</u> tilities <u>N</u> H Centr <u>a</u> l Fill <u>C</u> ards Session <u>H</u> elp | | | | | | |
|--|--|----------------------|----------------------------|----------------|------------------------|--|
| F3 - Patient F5 - Drug | F7 - Doctor F9 - Workflo | ow F11 - Drop-off F1 | 2 - New Rx Alt- | X - Start | | |
| Last Name Doe Fi | st Name Jane Salu | utation Ms. 👻 OK | Save | X Cancel | Patient | |
| | | | | | [⊗] Profile | |
| | int/Reprint F - Call | | 11111 | | All Rxs | |
| F2 - View Details D - Pharmacist Declined R - Patient Refused Medication Reviews (3) F2 [Ins [Del] | | | | | Active Rxs | |
| Туре | Status | Fee Status | Created v Completed | * | Active Rxs w/Passtimes | |
| (SMMA) Initial Assessment | Pending Review Not Completed Yet 19/08/2014 | | | Refillable Rxs | | |
| (SMMA) Initial Assessment | Refused by Patient No Fee Applicable 19/08/2014 19/08/2014 | | Distan Defi | | | |
| (SMMA) Initial Assessment | Completed Electronic | Pending Claim | 06/08/2014 06/08/2014 | E | Pricing Profile | |

Review Not Completed Yet

Reviews that have been initiated but have not yet been completed.

No Fee Applicable

Reviews with no associated fees (usually declined or refused reviews).

Pending Claim

Electronic reviews: Completed reviews with a Status of **Completed**.

Paper reviews: Reviews that have been printed and the option **Require Document scan to complete Paper Med Review** is off, and reports that have been printed and scanned back into the system if this option is enabled.