

Medication Reviews

Alberta



KROLL
Computer Systems Inc.

Contents

Configuration.....	1
Configuring Electronic Signatures.....	1
Configuring Electronic Medication Reviews.....	2
Electronic Medication Reviews.....	3
Configuring the Medication Review Prompt.....	3
Creating an Electronic Medication Review (Manual).....	5
Affixing an Electronic Signature.....	12
Printing a Medication Review.....	13
Billing a Medication Review.....	14
Medication Review Options.....	15
Completing Medication Review 'Saved for Later'.....	19
Sample Electronic Medication Review Report.....	20
Viewing a Completed Medication Review.....	23
Paper Medication Reviews.....	25
Configuring the Medication Review Prompt.....	25
Creating a Paper Medication Review (Manual).....	27
Scanning Medication Review Reports.....	29
Billing a Medication Review.....	31
Completing Medication Review 'Saved for Later'.....	31
Sample Paper Medication Report.....	32
Viewing a Completed Medication Review.....	35
Declined and Refused Medication Reviews.....	36
Pharmacist Declined.....	36
Patient Refused.....	37
Medication Review Statuses.....	38
Statuses.....	38
Fee Statuses.....	39

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.

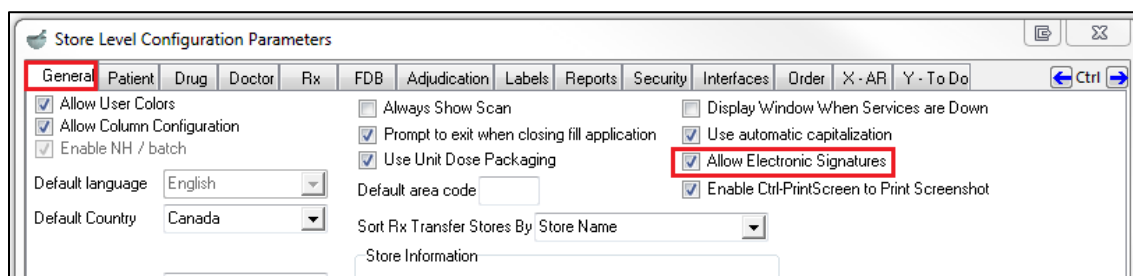
Configuring Electronic Signatures

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.



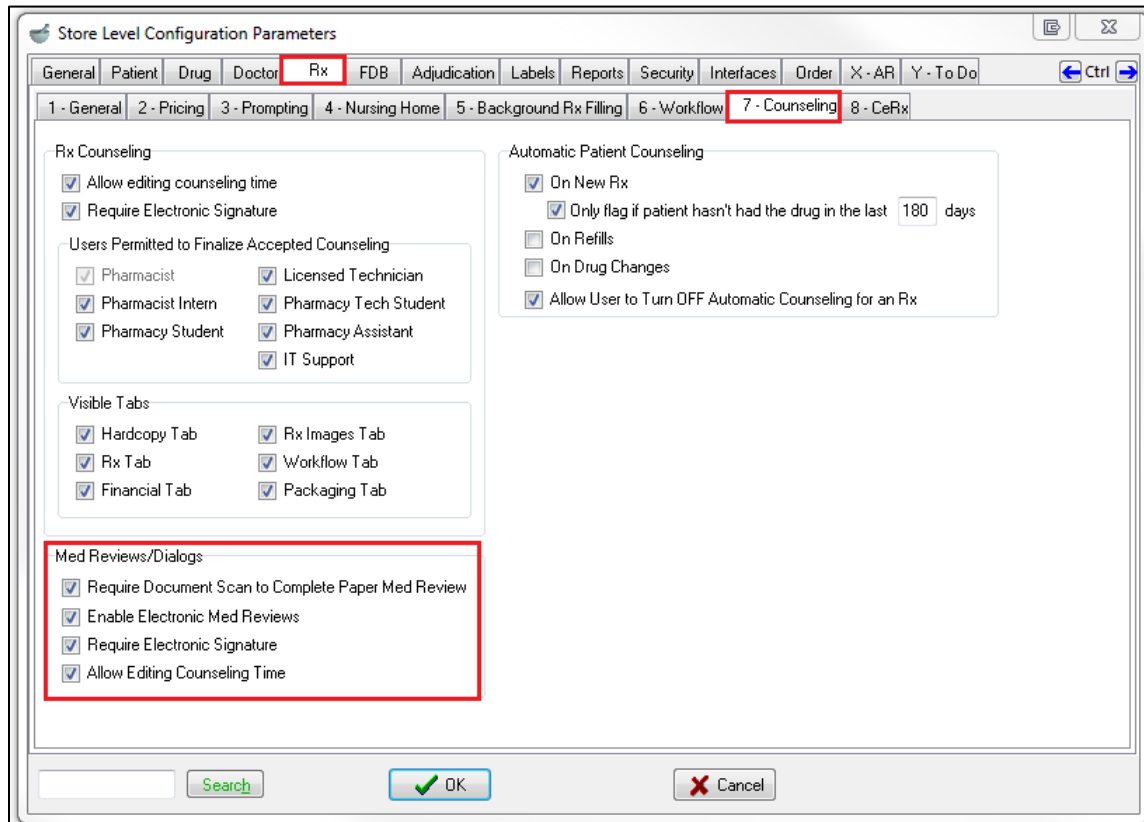
1. Go to **File > Configuration > Store > General**.
2. Place a checkmark next to **Allow Electronic Signatures**.



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

Configuring Electronic Medication Reviews

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



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.

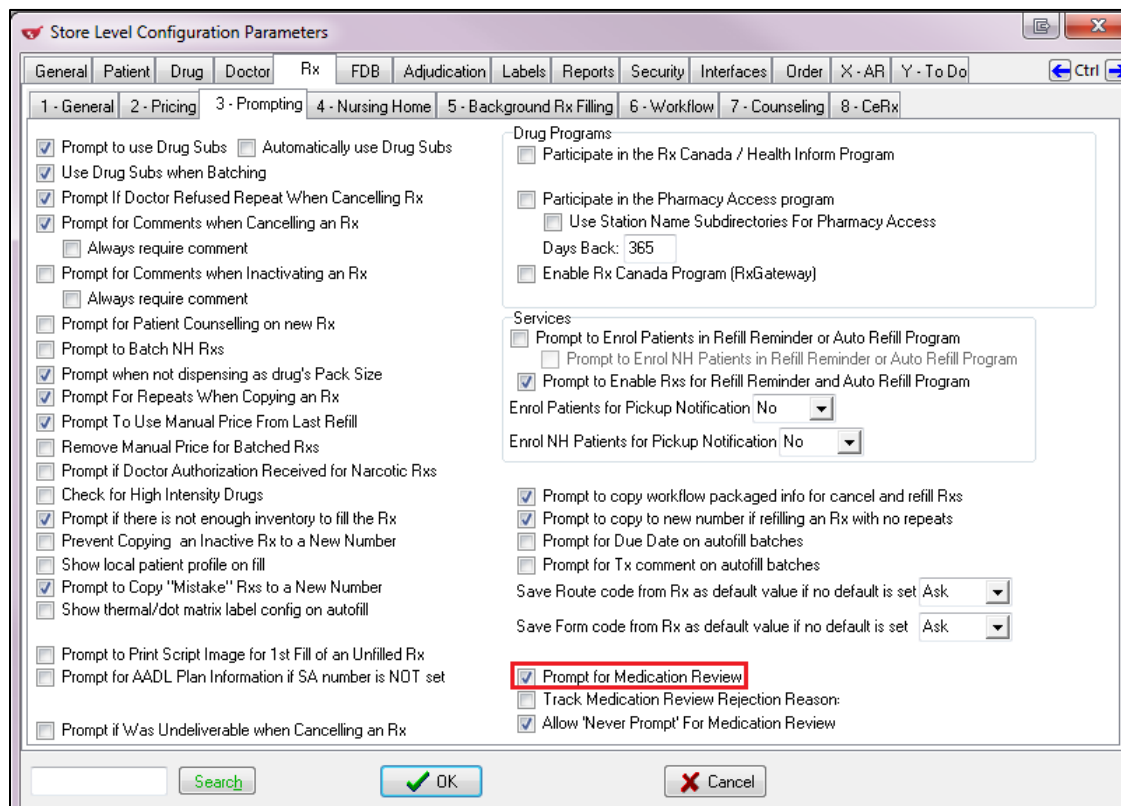
Electronic Medication Reviews

This section explains how to perform an Electronic Medication Review. Ensure your system is configured for Electronic Medication Reviews before proceeding. See [Paper Medication Review](#) for information on the non-electronic process.

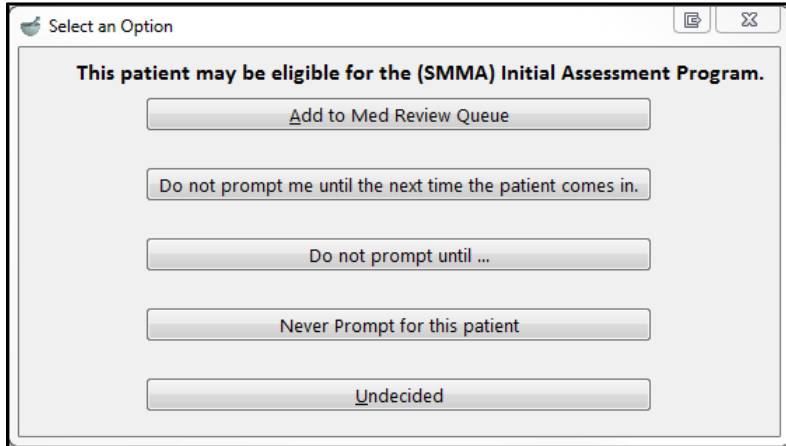
NOTE: The automatic prompts will not appear if the patient does not meet the criteria for a Medication Review. However, based on other available information and your professional judgement, you can determine whether the patient might benefit from a Medication Review and then manually create a Medication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



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.



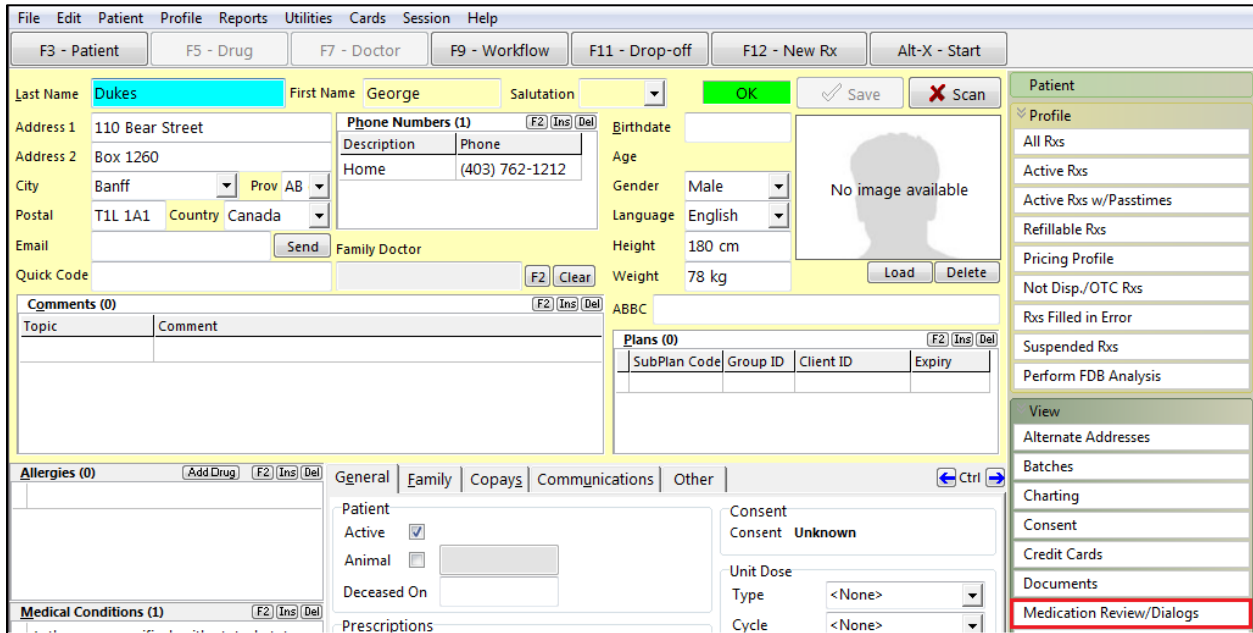
The screenshot shows a dialog box titled "Select an Option" with a close button in the top right corner. The main text reads: "This patient may be eligible for the (SMMA) Initial Assessment Program." Below this text are five buttons, each with a different option:

- 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.

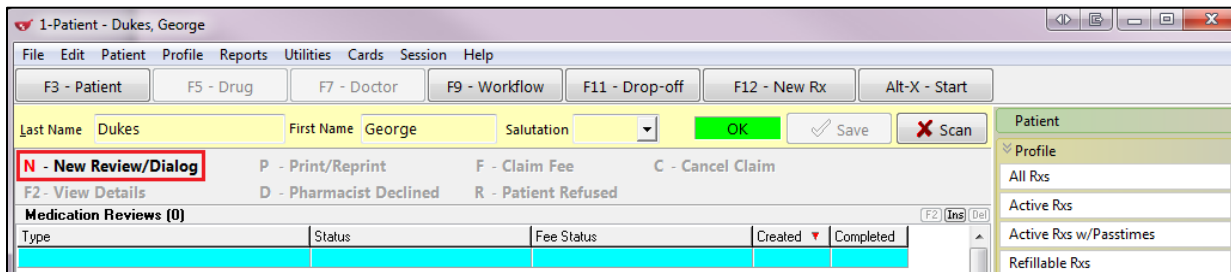
Creating an Electronic Medication Review (Manual)

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



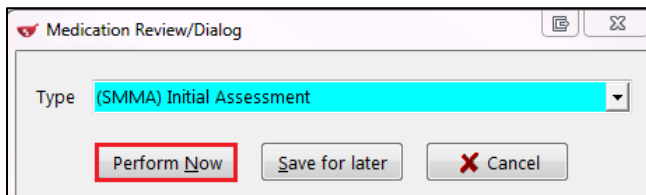
The screenshot shows the patient profile for George Dukes. The right-hand navigation pane is expanded to show various options, with 'Medication Review/Dialogs' highlighted in red. Other options include 'All Rxs', 'Active Rxs', 'Refillable Rxs', etc.

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



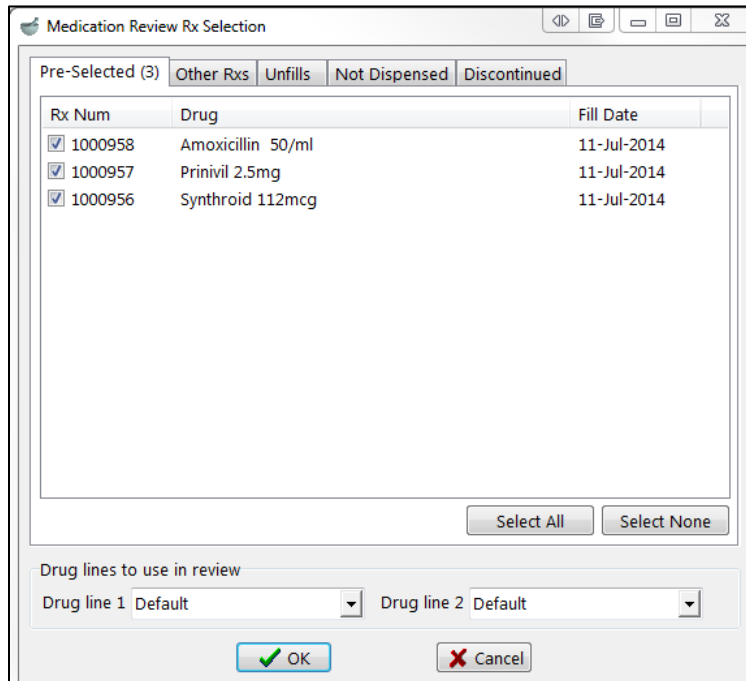
The screenshot shows the 'Medication Reviews (0)' section of the patient profile. A button labeled 'N - New Review/Dialog' is highlighted with a red box. Below it is a table with columns for Type, Status, Fee Status, Created, and Completed.

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**.



The screenshot shows the 'Medication Review/Dialog' dialog box. The 'Type' dropdown menu is set to '(SMMA) Initial Assessment'. Below the dropdown are three buttons: 'Perform Now' (highlighted with a red box), 'Save for later', and '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**.

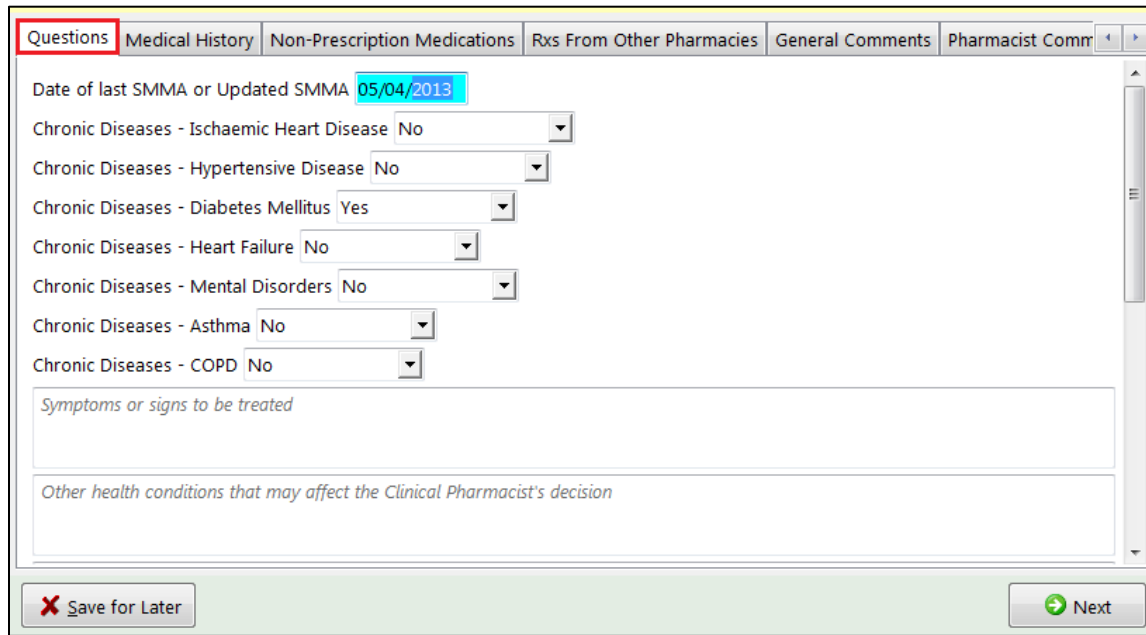


6. The **(SMMA) Initial Assessment** screen will appear. Click **Next** to proceed through the tabs, completing the required fields as you go.

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

Chronic Diseases - Heart Failure No

Chronic Diseases - Mental Disorders No

Chronic Diseases - Asthma No

Chronic Diseases - COPD No

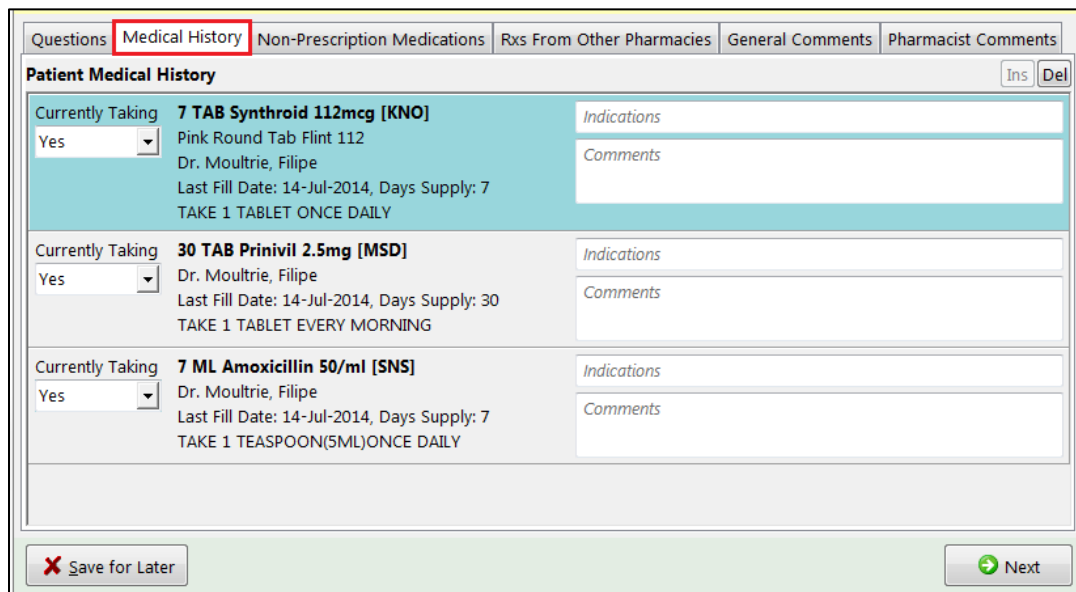
Symptoms or signs to be treated

Other health conditions that may affect the Clinical Pharmacist's decision

Save for Later Next

Medical History

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



Questions | Medical History | Non-Prescription Medications | Rxs From Other Pharmacies | General Comments | Pharmacist Comments

Patient Medical History Ins Del

Currently Taking Yes	7 TAB Synthroid 112mcg [KNO] Pink Round Tab Flint 112 Dr. Moultrie, Filipe Last Fill Date: 14-Jul-2014, Days Supply: 7 TAKE 1 TABLET ONCE DAILY	Indications Comments
Currently Taking Yes	30 TAB Prinivil 2.5mg [MSD] Dr. Moultrie, Filipe Last Fill Date: 14-Jul-2014, Days Supply: 30 TAKE 1 TABLET EVERY MORNING	Indications Comments
Currently Taking Yes	7 ML Amoxicillin 50/ml [SNS] Dr. Moultrie, Filipe Last Fill Date: 14-Jul-2014, Days Supply: 7 TAKE 1 TEASPOON(5ML)ONCE DAILY	Indications Comments

Save for Later Next

For each medication listed:

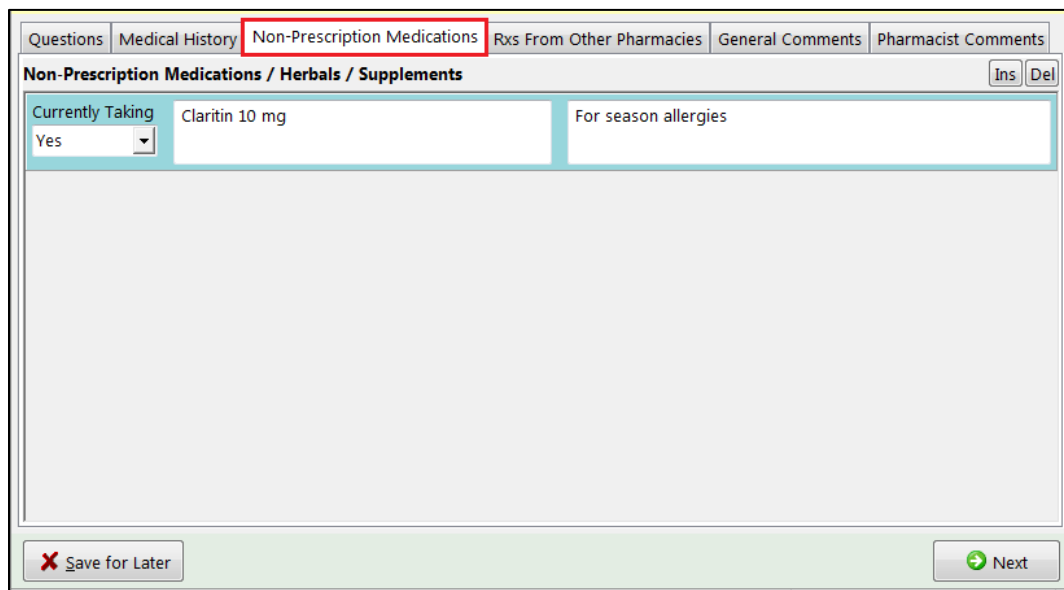
- Note if the patient is currently taking the specified medications and select **Yes/No** from the dropdown list.
- Enter the reason for using the medication based on the patient’s feedback in the **Indications** field.
- Enter any general comments in the **Comments** field.

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.



- 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.

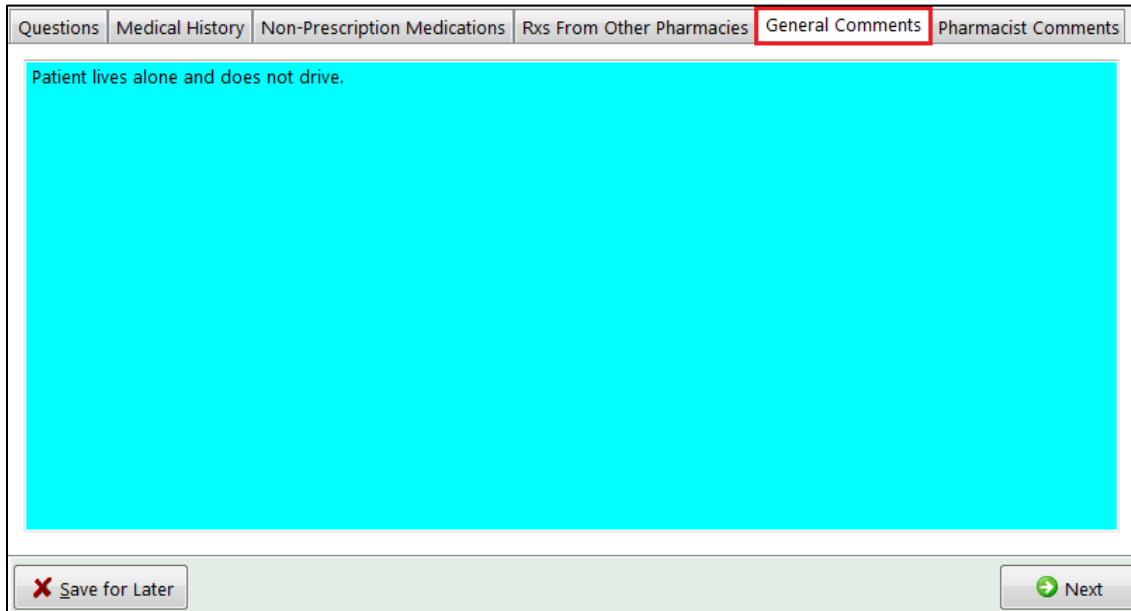
Questions	Medical History	Non-Prescription Medications	Rxs From Other Pharmacies	General Comments	Pharmacist Comments
Prescriptions From Other Pharmacies Ins Del					
Currently Taking Yes	Tylenol # 3 - Take 1 to 2 tablets up to 4 times a day when needed for pain	From - Smith's Pharmacy - (555) - 123-4567 Possible duplication of therapy			
Currently Taking Yes	Bisoprolol 5mg - take 1 tablet daily	From - Duncan Mill Pharmacy - (555) - 555- 5555 Duplication of therapy			
<input type="button" value="X Save for Later"/>		<input type="button" value="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

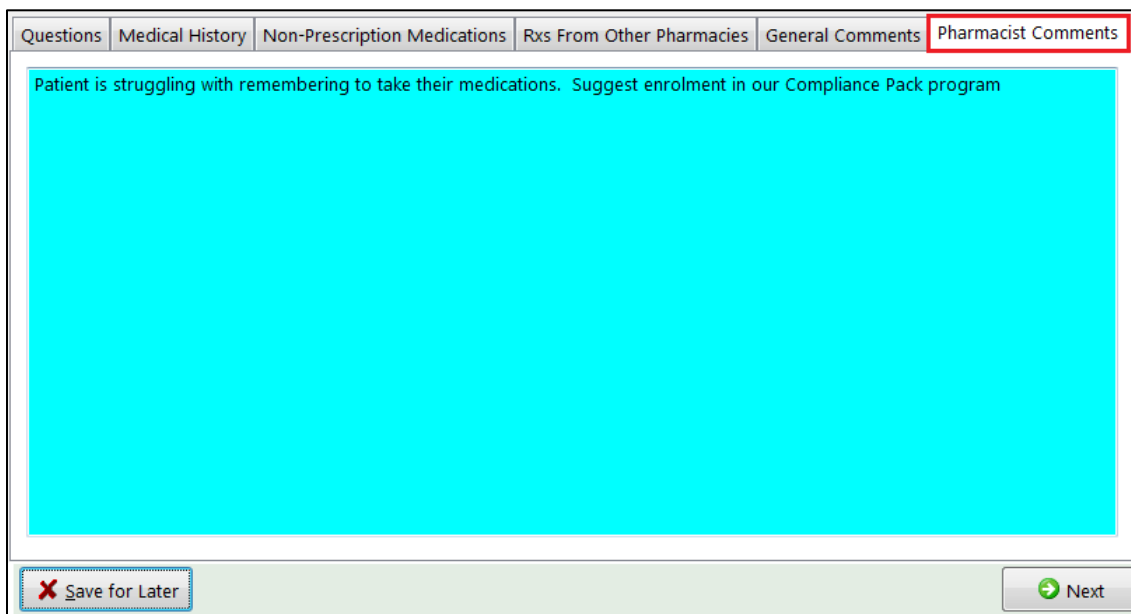
The **General Comments** tab provides space to record any comments you want included on the report printout.



The screenshot shows a software interface with a tabbed menu at the top. The tabs are: Questions, Medical History, Non-Prescription Medications, Rxs From Other Pharmacies, **General Comments** (highlighted with a red border), and Pharmacist Comments. The main content area is a large cyan-colored text box containing the text: "Patient lives alone and does not drive." At the bottom of the interface, there are two buttons: "Save for Later" with a red 'X' icon and "Next" with a green arrow icon.

Pharmacist Comments

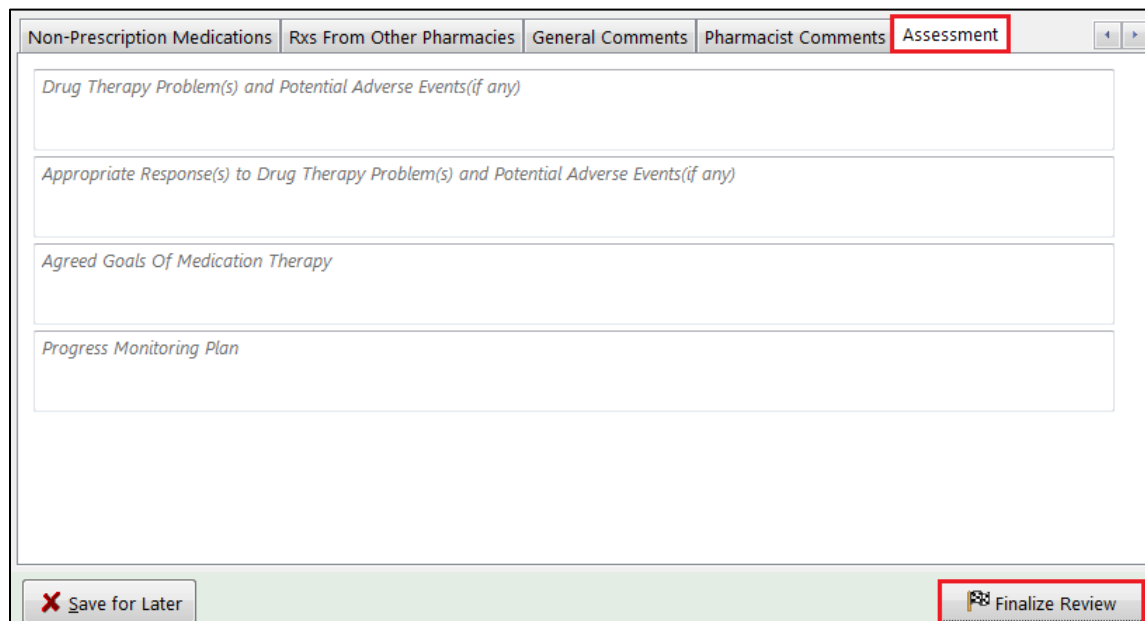
The **Pharmacist Comments** tab provides space to record any comments that the pharmacist wishes to enter concerning the medication or patient in the free form.



The screenshot shows the same software interface as above, but with the "Pharmacist Comments" tab selected and highlighted with a red border. The main cyan-colored text box contains the text: "Patient is struggling with remembering to take their medications. Suggest enrolment in our Compliance Pack program". The "Save for Later" and "Next" buttons are visible at the bottom.

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.

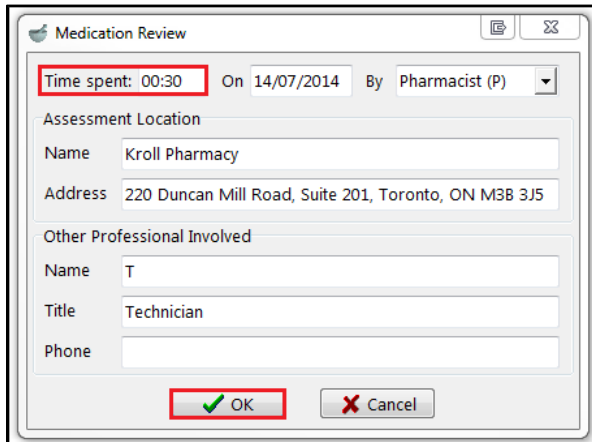


The screenshot shows a software interface with a tabbed menu at the top. The tabs are: Non-Prescription Medications, Rxs From Other Pharmacies, General Comments, Pharmacist Comments, and Assessment. The 'Assessment' tab is selected and highlighted with a red box. Below the tabs are four text input fields with the following labels: 'Drug Therapy Problem(s) and Potential Adverse Events(if any)', 'Appropriate Response(s) to Drug Therapy Problem(s) and Potential Adverse Events(if any)', 'Agreed Goals Of Medication Therapy', and 'Progress Monitoring Plan'. At the bottom left of the form is a button labeled 'X Save for Later'. At the bottom right is a button labeled 'Finalize Review', which is also highlighted with a red box.

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.

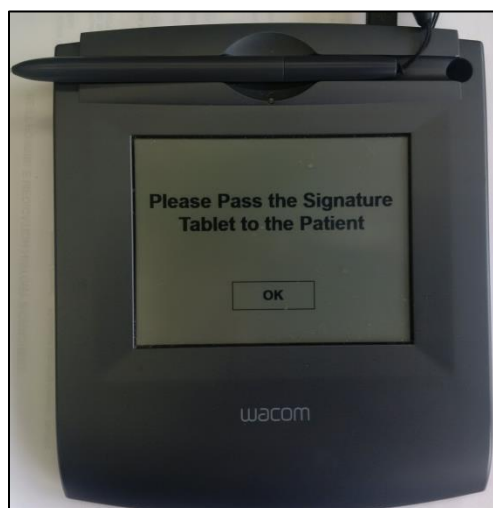
When you are finished, click **OK**.



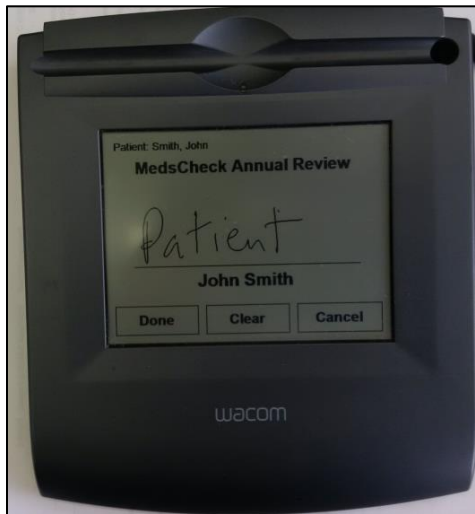
Affixing an Electronic Signature

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.

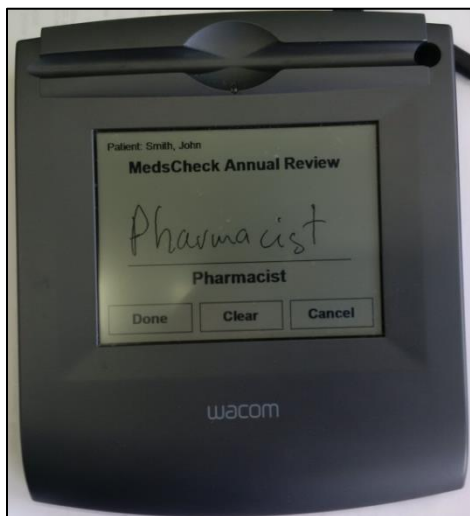
9. Have the patient sign his or her name on the electronic signature tablet. Click the **OK** button on the signature tablet.



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**.

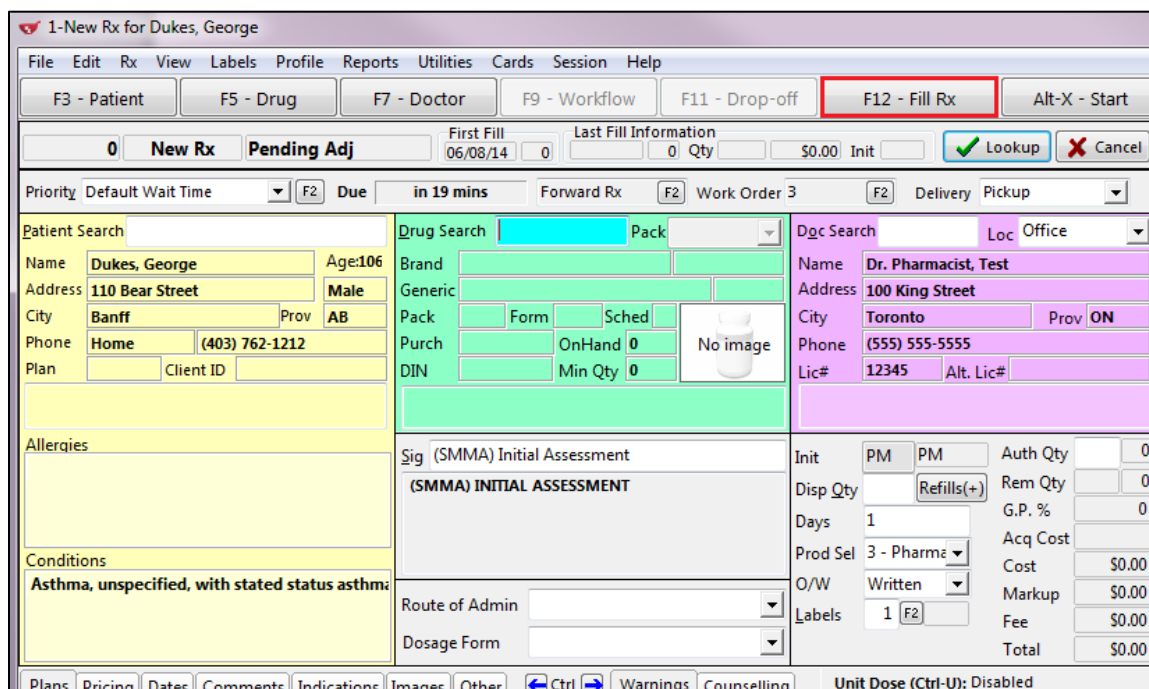
13. The **Medication Review report** print form will appear. Select the appropriate print options and click **Print** and provide this copy to the patient.

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.

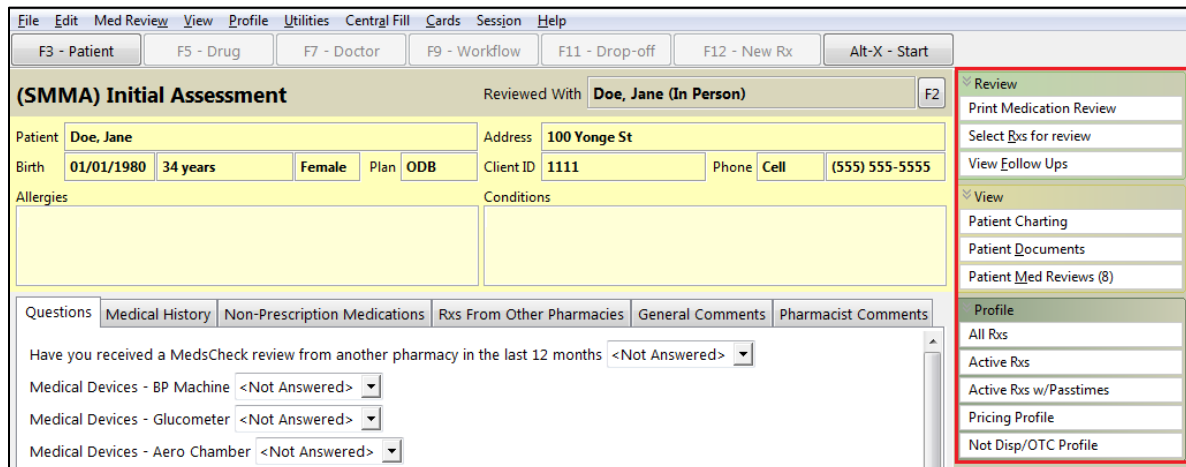
15. Click **F12 - Fill Rx**. The claim will be transmitted to the appropriate party for payment.



The screenshot shows the 'F12 - Fill Rx' screen in a software application. The window title is '1-New Rx for Dukes, George'. The menu bar includes File, Edit, Rx, View, Labels, Profile, Reports, Utilities, Cards, Session, and Help. The toolbar contains buttons for F3 - Patient, F5 - Drug, F7 - Doctor, F9 - Workflow, F11 - Drop-off, F12 - Fill Rx (highlighted with a red box), and Alt-X - Start. Below the toolbar, there are fields for 'New Rx' (0) and 'Pending Adj' (0), along with 'First Fill' (06/08/14) and 'Last Fill Information' (0). A 'Lookup' button is active, and a 'Cancel' button is disabled. The main area is divided into several sections: 'Patient Search' (Name: Dukes, George, Age: 106, Address: 110 Bear Street, City: Banff, Prov: AB, Phone: (403) 762-1212), 'Drug Search' (Brand, Generic, Pack, Form, Sched, Purch, OnHand: 0, DIN, Min Qty: 0), 'Dgc Search' (Name: Dr. Pharmacist, Test, Address: 100 King Street, City: Toronto, Prov: ON, Phone: (555) 555-5555, Lic#: 12345), 'Sig' ((SMMMA) INITIAL ASSESSMENT), 'Route of Admin', 'Dosage Form', and a 'Totals' section (Auth Qty: 0, Rem Qty: 0, G.P. %: 0, Acq Cost: \$0.00, Cost: \$0.00, Markup: \$0.00, Fee: \$0.00, Total: \$0.00). The bottom status bar shows 'Unit Dose (Ctrl-U): Disabled'.

Medication Review Options

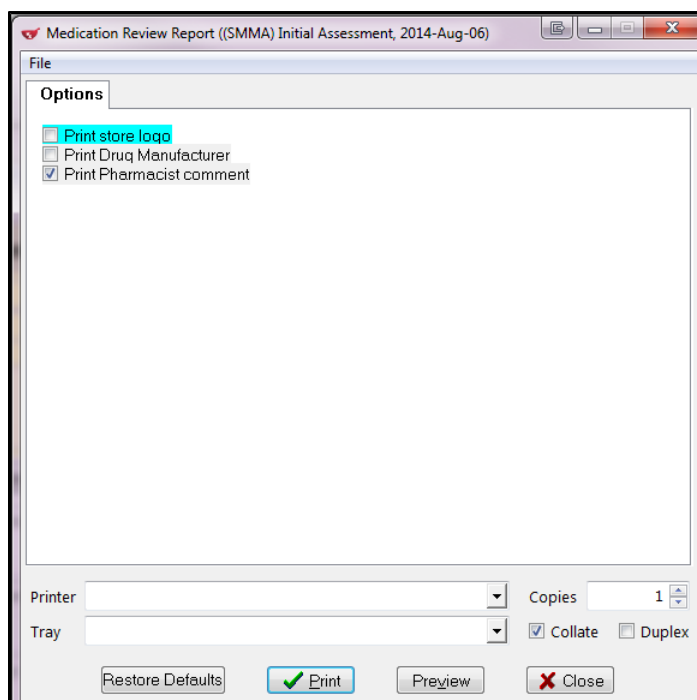
Several Medication Review options are available from the right navigation pane on the **(SMMA) Initial Assessment** screen.



Review

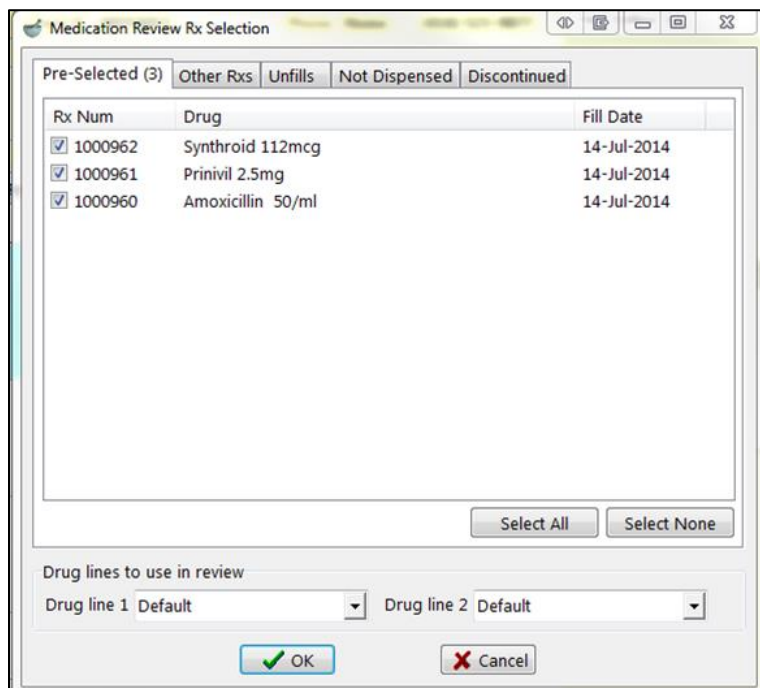
Print Medication Review

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.



Select Rxs for review

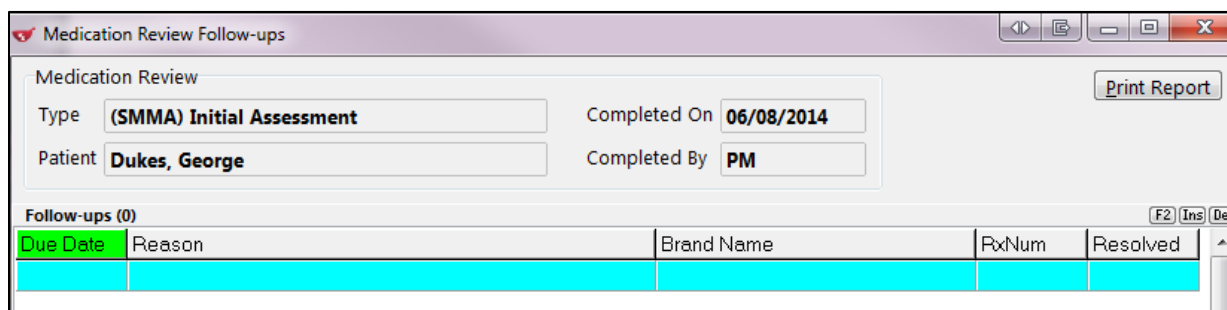
If you wish to add/edit Rxs on the Medical History tab, click the button Select Rxs for review. When selected, the **Medication Review Rx Selection** screen will appear, allowing you to add and remove items from the **Medical History** tab on the **Medication Review Annual Review** screen. Click **OK**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



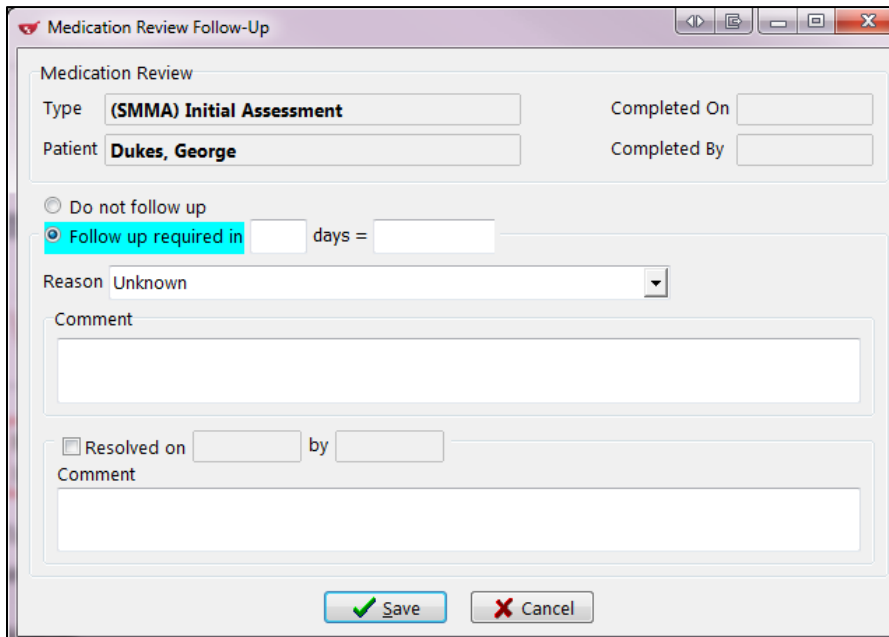
View Follow Ups

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.



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



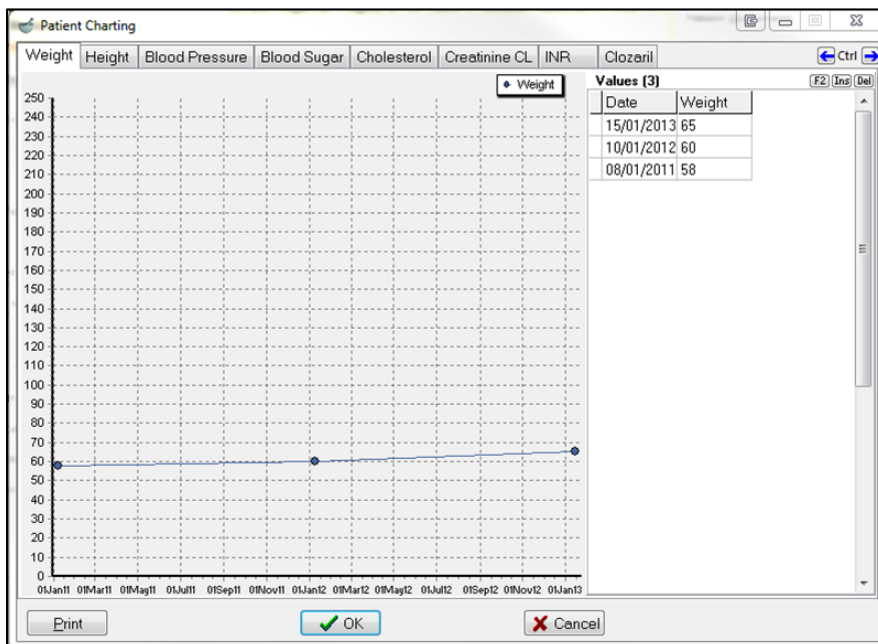
The form is titled "Medication Review Follow-Up". It contains the following fields and options:

- Medication Review** section:
 - Type: (SMMA) Initial Assessment
 - Completed On: [Empty field]
 - Patient: Dukes, George
 - Completed By: [Empty field]
- Radio buttons for follow-up status:
 - Do not follow up
 - Follow up required in [] days = []
- Reason: Unknown (dropdown menu)
- Comment: [Large text area]
- Resolved on: [] by [] (checkbox and text fields)
- Comment: [Large text area]
- Buttons: Save (green checkmark), Cancel (red X)

View

Patient Charting

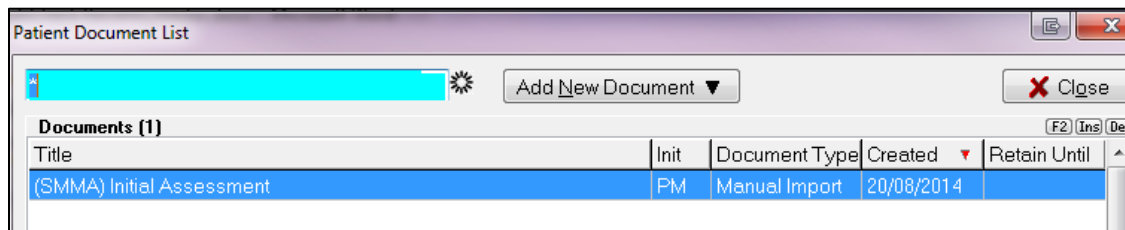
When this option is selected, the **Patient Charting** form will appear, displaying information about the patient’s weight, height, blood pressure, blood sugar, and so on.



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

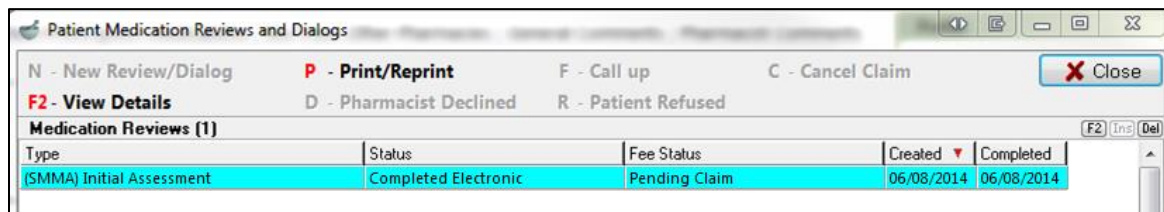
When this option is selected, the **Patient Document List** will appear displaying a list of documents associated with the patient.



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.



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

Profile

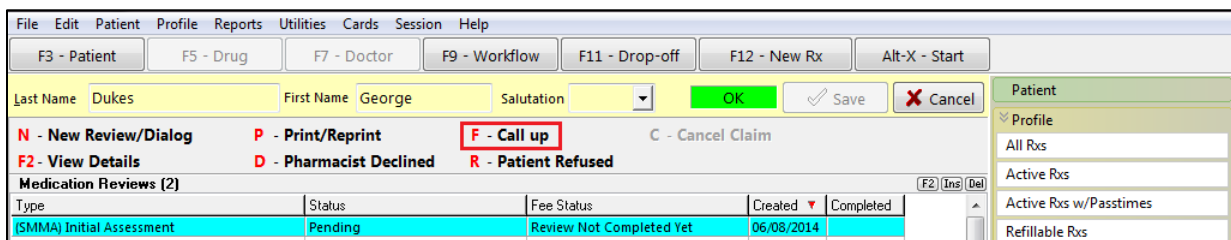
The **Profile** menu on the **(SMMA) Initial Assessment** screen is identical to the **Profile** menu on the patient profile. This menu allows you to view **All Rxs**, **Active Rxs**, **Active Rxs w/ Passtimes**, **Pricing Profile**, and **Not Disp/OTC Profile**.

Completing Medication Review ‘Saved for Later’

- 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

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



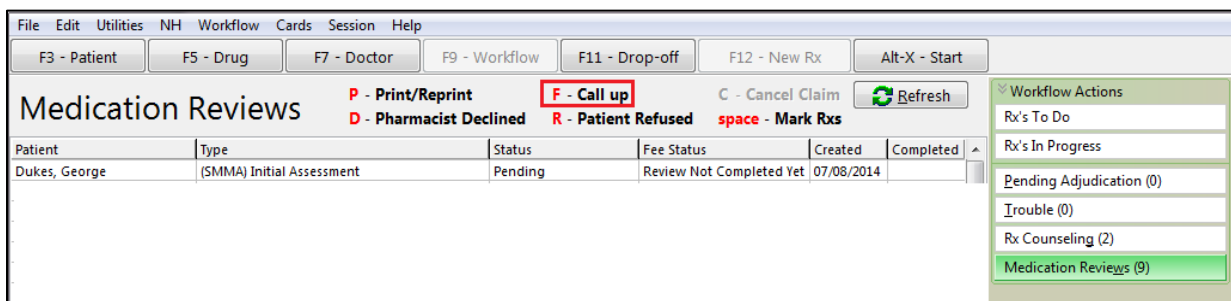
The screenshot shows the 'Patient Card' window for a patient named 'Dukes, George'. The 'Medication Reviews (2)' table is visible with the following data:

Type	Status	Fee Status	Created	Completed
(SMMA) Initial Assessment	Pending	Review Not Completed Yet	06/08/2014	

Navigation buttons include: F3 - Patient, F5 - Drug, F7 - Doctor, F9 - Workflow, F11 - Drop-off, F12 - New Rx, and Alt-X - Start. Action buttons include: N - New Review/Dialog, P - Print/Reprint, F - Call up (highlighted), C - Cancel Claim, F2 - View Details, D - Pharmacist Declined, and R - Patient Refused.

F9 - Workflow

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



The screenshot shows the 'Medication Reviews' window. The 'Medication Reviews' table is visible with the following data:

Patient	Type	Status	Fee Status	Created	Completed
Dukes, George	(SMMA) Initial Assessment	Pending	Review Not Completed Yet	07/08/2014	

Navigation buttons include: F3 - Patient, F5 - Drug, F7 - Doctor, F9 - Workflow, F11 - Drop-off, F12 - New Rx, and Alt-X - Start. Action buttons include: P - Print/Reprint, F - Call up (highlighted), C - Cancel Claim, Refresh, D - Pharmacist Declined, R - Patient Refused, and space - Mark Rxs.

The 'Workflow Actions' pane on the right shows: Rx's To Do, Rx's In Progress, Pending Adjudication (0), Trouble (0), Rx Counseling (2), and Medication Reviews (9).

- Complete steps 3-8 of the [Creating an Electronic Medication Review](#) section.

Sample Electronic Medication Review Report

(SMMA) Initial Assessment


<i>Personal Medication Record of</i> Dukes, George			<i>Address</i> 110 Bear Street, Banff AB T1L 1A1	
<i>DOB</i> 01-Apr-1908	<i>Gender</i> M	<i>Alberta Personal Health Care Card Number</i>	<i>Phone</i> (403) 762-1212	<i>Date of last SMMA or Updated SMMA</i> 05-Apr-2013
<i>Allergies</i> N/A			<i>Conditions</i> Asthma,unspecified,withstatedstatusasthmaticus	
<input type="checkbox"/> Chronic Diseases - Hypertensive Disease <input checked="" type="checkbox"/> Chronic Diseases - Diabetes Mellitus <input type="checkbox"/> Chronic Diseases - COPD <input type="checkbox"/> Chronic Diseases - Asthma <input type="checkbox"/> Chronic Diseases - Heart Failure <input type="checkbox"/> Chronic Diseases - Ischaemic Heart Disease <input type="checkbox"/> Chronic Diseases - Mental Disorders			<i>List of Schedule 1 Drugs and/or Insulin</i> Paxil	

INFORMATION FOR ASSESSMENT

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 affect the Clinical Pharmacist's decision
Other health condition that may affect the Clinical Pharmacist's decision
Lifestyle factors which may affect drug therapy, including but not limited to caffeine, tobacco, alcohol usage
Any other health information that a reasonable Clinical Pharmacist would require to perform the Pharmacy Service

Has a CACP, SMMA or Physician CPP ever been completed for this Resident	Yes	No	Has a CACP been completed for this Resident in this Service Year	Yes	No
Have copies been obtained	Yes	No			

Page 1 of 3



(SMMA) Initial Assessment

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 Potential Adverse Events (if any)

Appropriate Response(s) to Drug Therapy Problem(s) and Potential Adverse Events (if any)

Agreed Goals of Medication Therapy

Progress Monitoring Plan

General Comments

General comments

Pharmacist Comment

Pharmacist comments

LOCATION OF THE ASSESSMENT

Name

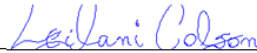
Address



(SMMA) Initial Assessment**Declaration and Consent of Resident/Resident's Personal Representative (if applicable)**

I hereby confirm that:

- I have reviewed and discussed this SMMA/Updated SMMA with the Clinical Pharmacist who prepared it;
- I understand and accept the goals and potential risks of the medication therapy as outlined in this SMMA/Updated SMMA; and
- I have been provided with a copy of this SMMA/Updated SMMA.

**Dukes, George**

Date

Declaration of Clinical Pharmacist

- I have personally seen and conducted an Assessment on Dukes, George for the purpose of preparing, documenting and reviewing this SMMA/Updated SMMA in accordance with the requirements set out in the Compensation Plan for Pharmacy Services



Kroll

Registration#: 123124515

NO Additional Prescribing Authority

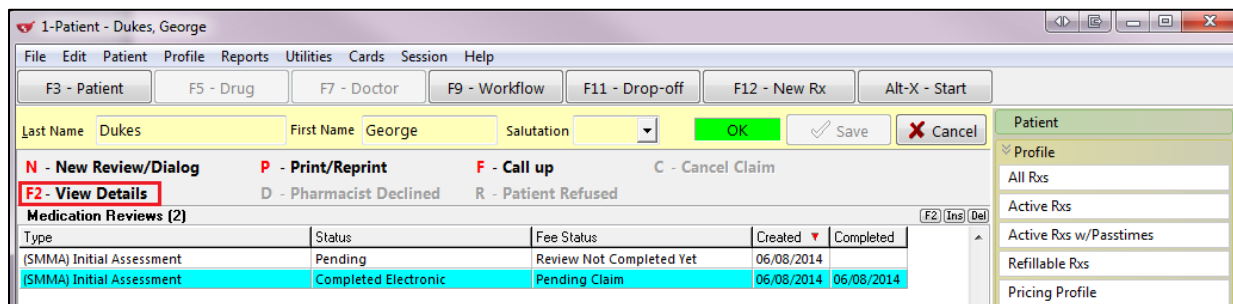
Date



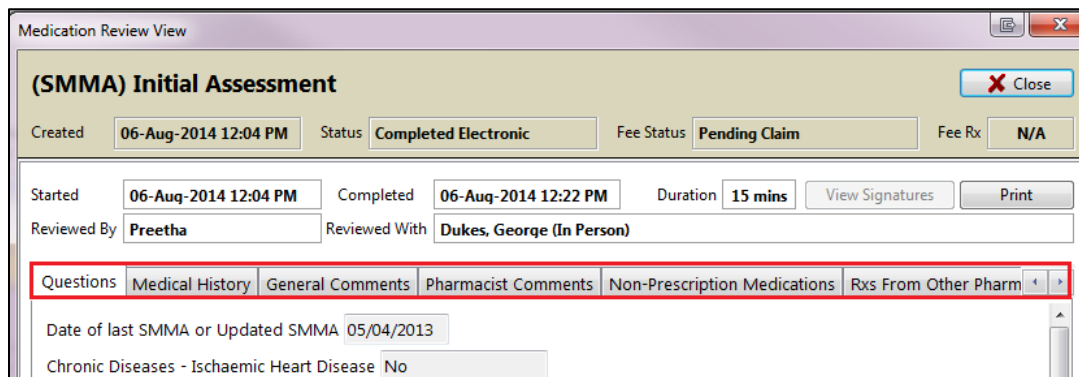
Viewing a Completed Medication Review

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**.



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

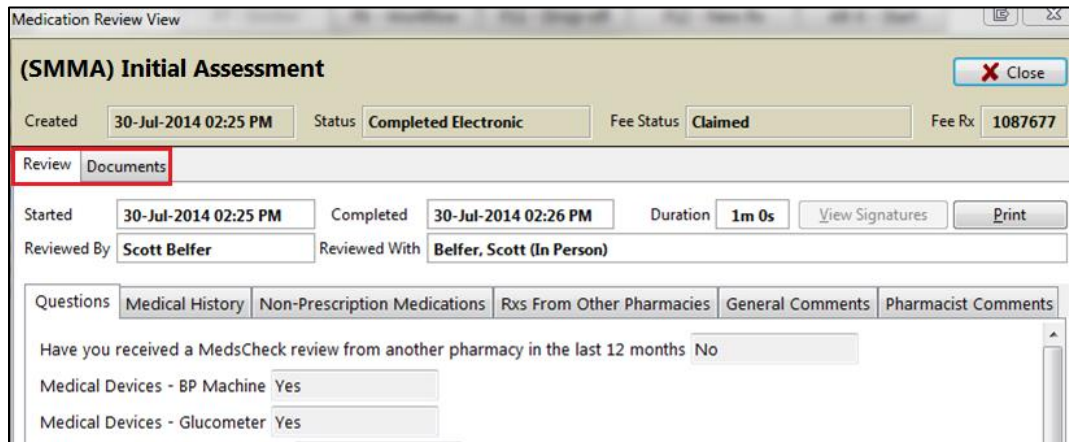


5. Click **Print** to print the Medication Review, or **View Signatures** to view the pharmacist's or patient's electronic signature.

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**.

- 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.



The screenshot shows the 'Medication Review View' window. At the top, it displays '(SMMA) Initial Assessment' with a 'Close' button. Below this, there are fields for 'Created' (30-Jul-2014 02:25 PM), 'Status' (Completed Electronic), 'Fee Status' (Claimed), and 'Fee Rx' (1087677). A red box highlights the 'Review' and 'Documents' tabs. Below the tabs, there are fields for 'Started' (30-Jul-2014 02:25 PM), 'Completed' (30-Jul-2014 02:26 PM), 'Duration' (1m 0s), 'View Signatures', and 'Print'. There are also fields for 'Reviewed By' (Scott Belfer) and 'Reviewed With' (Belfer, Scott (In Person)). At the bottom, there are tabs for 'Questions' (Medical History, Non-Prescription Medications, Rxs From Other Pharmacies, General Comments, Pharmacist Comments) and a list of questions with 'Yes' or 'No' answers: 'Have you received a MedsCheck review from another pharmacy in the last 12 months' (No), 'Medical Devices - BP Machine' (Yes), and 'Medical Devices - Glucometer' (Yes).

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

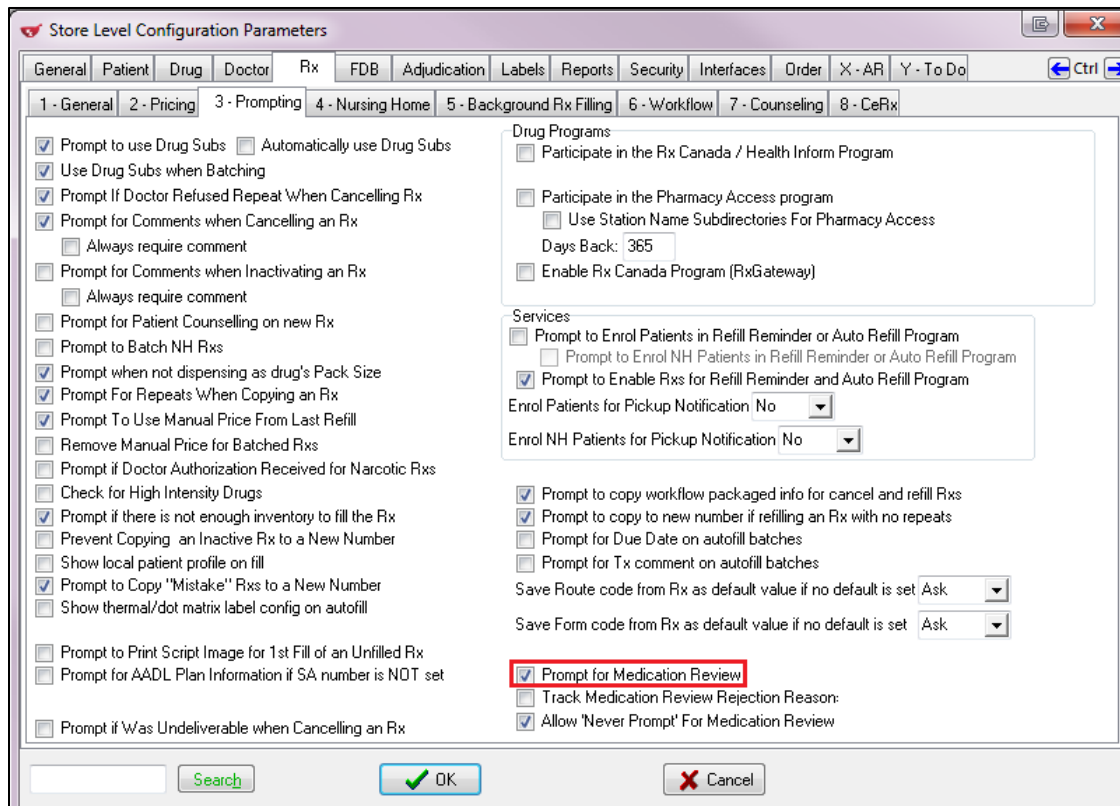
Paper Medication Reviews

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

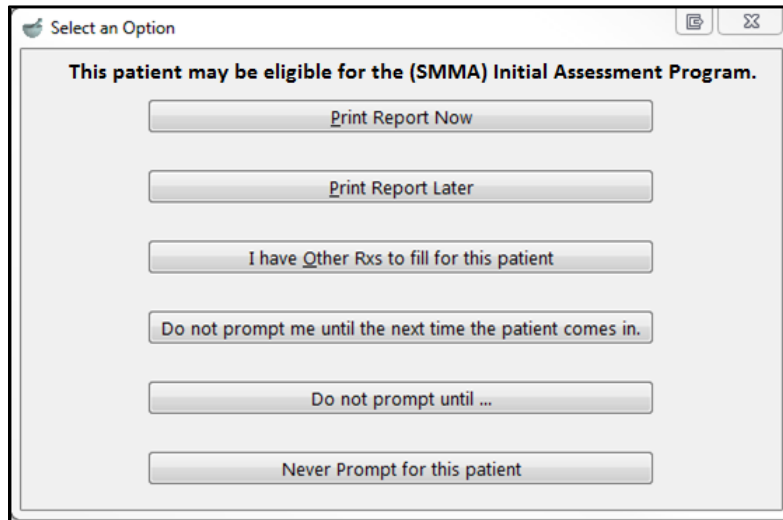
NOTE: The automatic prompts will not appear if the patient does not meet the criteria for a Medication Review. However, based on other available information and your professional judgement, you can determine whether the patient might benefit from a Medication Review and then manually create a Medication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



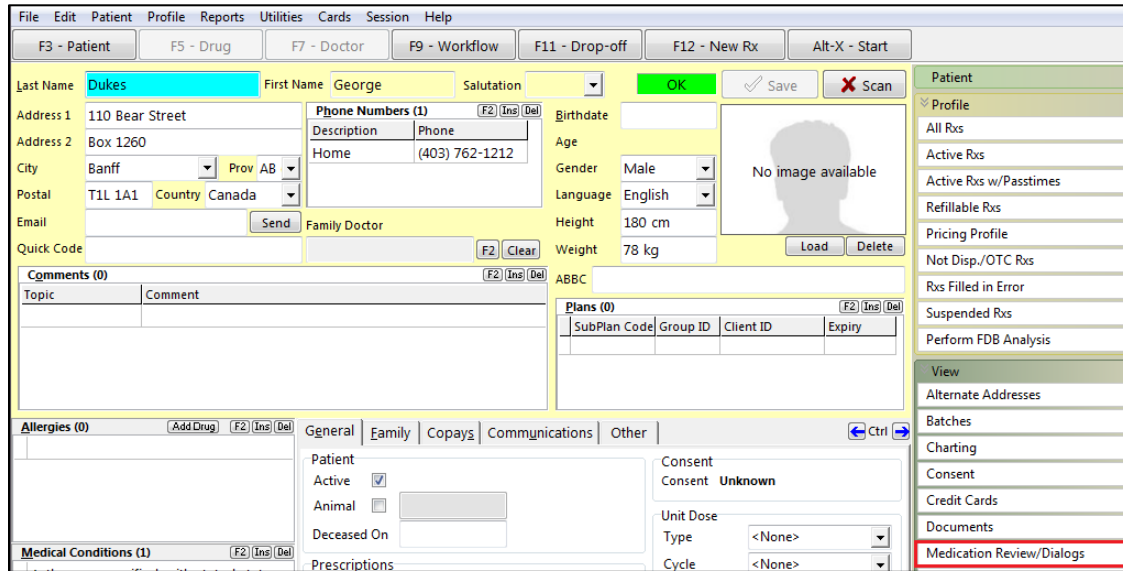
When the option '**Prompt for Medication Review**' is enabled, the system screens each patient for Medication Review eligibility every time an Rx is processed. If the patient is eligible, the user is prompted and presented with a number of options as shown below.



- **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 '[Completing Medication Reviews 'Saved for Later'](#)' for further details.
- **I have Other Rx's to fill for this patient:** This will allow you to continue filling more Rx's 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.

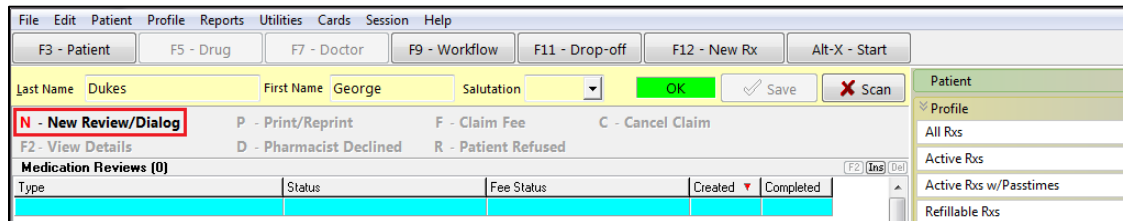
Creating a Paper Medication Review (Manual)

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



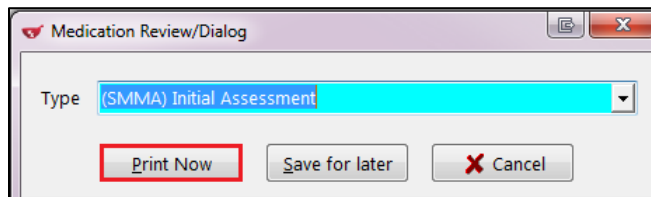
The screenshot shows a patient profile window for George Dukes. The right-hand navigation pane is open, and 'Medication Review/Dialogs' is highlighted with a red box. Other options in the pane include Profile, All Rxs, Active Rxs, Active Rxs w/Passtimes, Refillable Rxs, Pricing Profile, Not Disp./OTC Rxs, Rxs Filled in Error, Suspended Rxs, Perform FDB Analysis, View, Alternate Addresses, Batches, Charting, Consent, Credit Cards, Documents, and Medication Review/Dialogs.

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



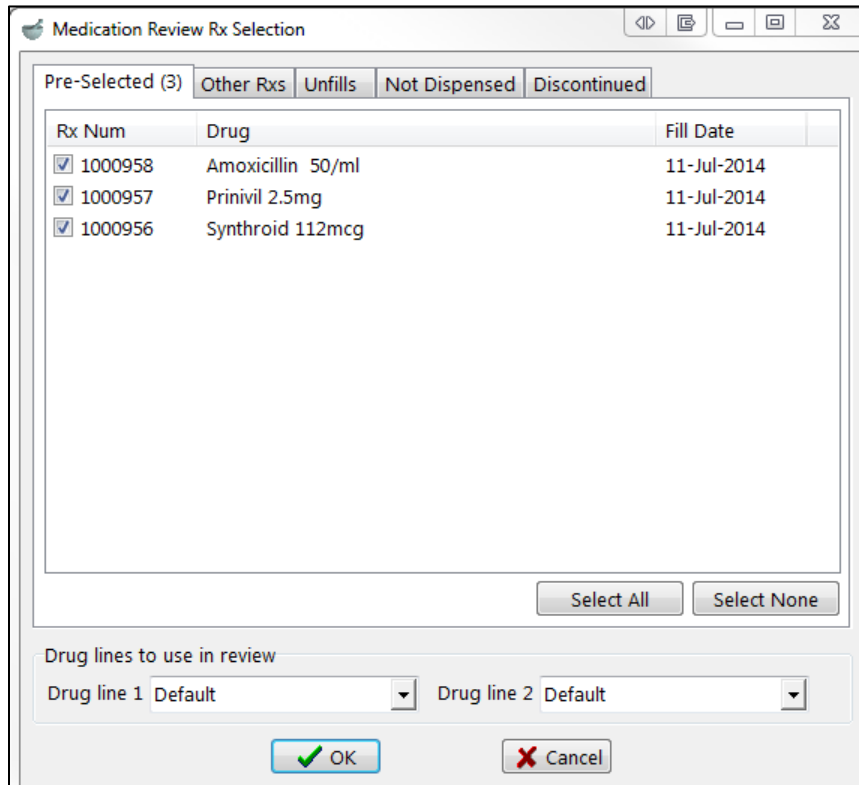
The screenshot shows the Medication Reviews queue window. The 'N - New Review/Dialog' button is highlighted with a red box. The queue is currently empty, with columns for Type, Status, Fee Status, Created, and Completed.

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**.



The screenshot shows the Medication Review/Dialog dialog box. The 'Type' dropdown menu is set to '(SMMA) Initial Assessment'. The 'Print Now' button is highlighted with a red box. Other buttons include 'Save for later' and '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**.



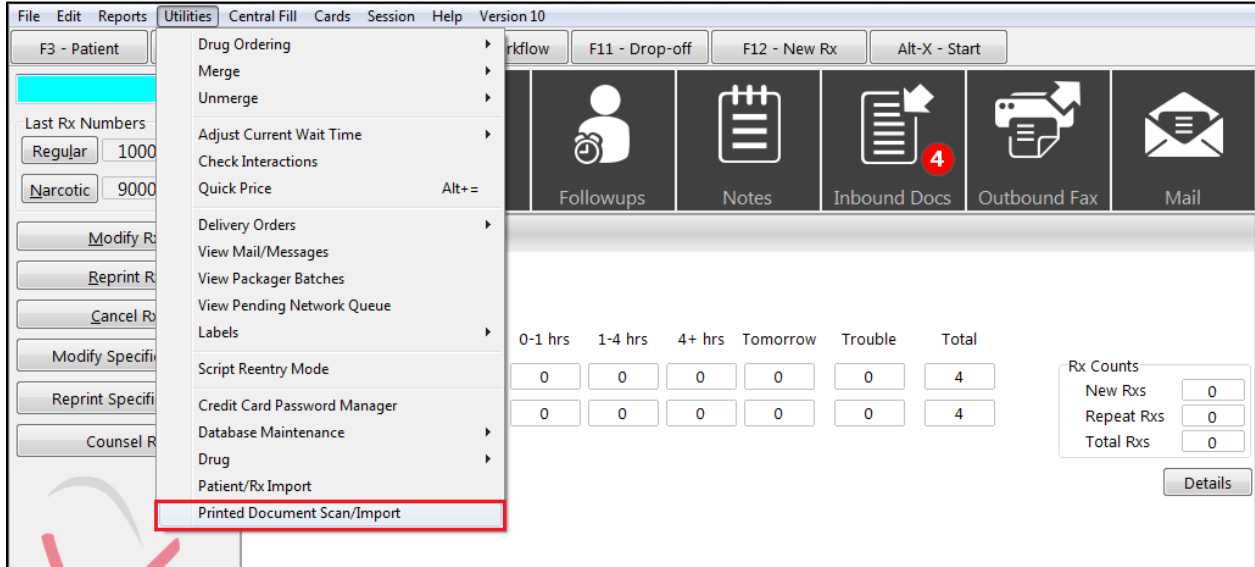
The screenshot shows a window titled "Medication Review Rx Selection" with a standard Windows-style title bar. Below the title bar are five tabs: "Pre-Selected (3)", "Other Rxs", "Unfills", "Not Dispensed", and "Discontinued". The "Pre-Selected (3)" tab is active. Below the tabs is a table with three columns: "Rx Num", "Drug", and "Fill Date". The table contains three rows, each with a checked checkbox in the first column. Below the table are two buttons: "Select All" and "Select None". At the bottom of the window, there is a section labeled "Drug lines to use in review" with two dropdown menus, both set to "Default". At the very bottom are two buttons: "OK" (with a green checkmark icon) and "Cancel" (with a red X icon).

Rx Num	Drug	Fill Date
<input checked="" type="checkbox"/> 1000958	Amoxicillin 50/ml	11-Jul-2014
<input checked="" type="checkbox"/> 1000957	Prinivil 2.5mg	11-Jul-2014
<input checked="" type="checkbox"/> 1000956	Synthroid 112mcg	11-Jul-2014

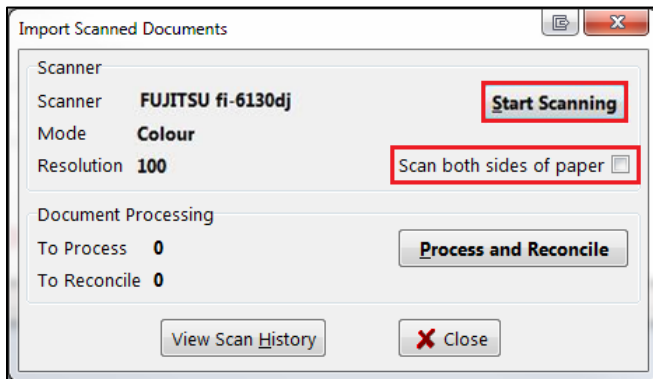
6. The **Medication Review Report** form will appear. Select the appropriate print options and click **Print**. The report will generate.
7. Complete the Medication Review on the form. Sign the **Medication Review Report** and have the patient do the same.

Scanning Medication Review Reports

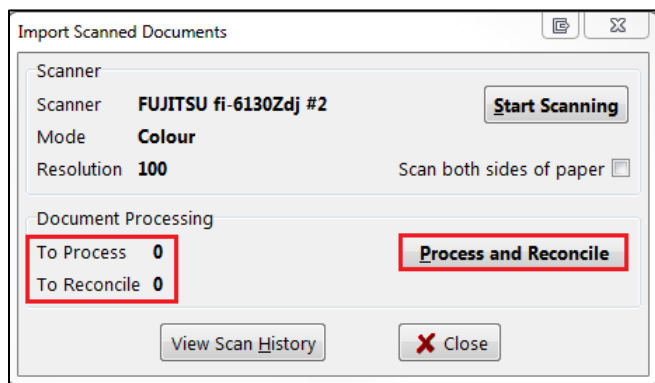
8. From the **Alt-X Start** screen, go to **Utilities > Printed Document Scan/Import**.



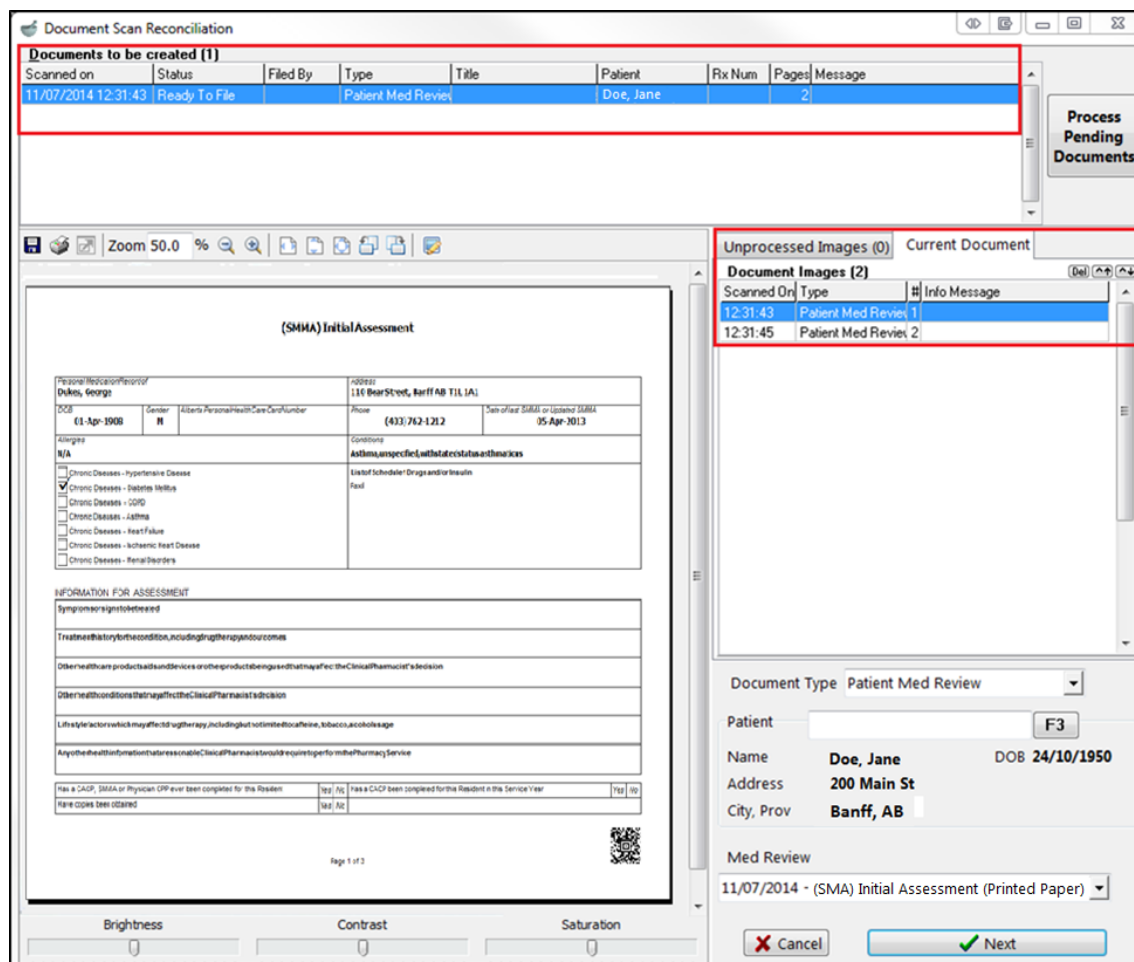
9. The **Import Scanned Documents** screen will appear. Place the report pages face down on the scanner hopper. Check **Scan both sides of paper** if you are scanning pages with information on both sides and your scanner supports dual side scanning. Click **Start Scanning**.



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**.



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.



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.

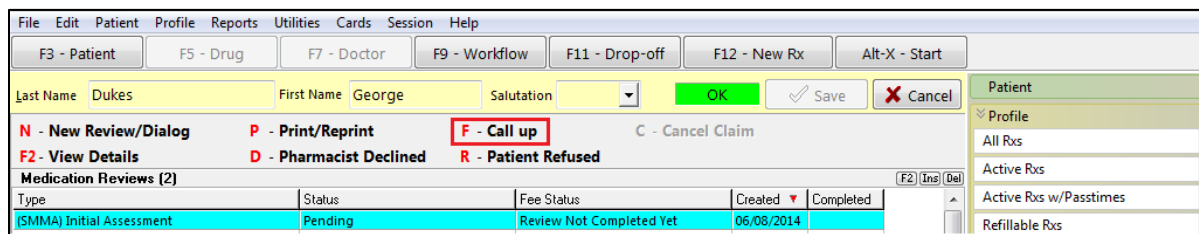
14. Click **F12 - Fill Rx**. The claim will be transmitted to the appropriate party for payment.

Completing Medication Review ‘Saved for Later’

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

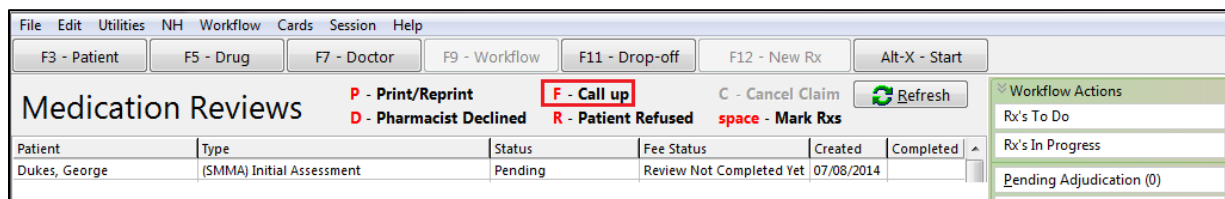
Patient Card

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



F9 - Workflow

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



2. Complete steps 4-14 of the [Creating a Paper Medication Review](#) section.

Sample Paper Medication Report

(SMMA) Initial Assessment

Personal Medication Record of Dukes, George			Address 110 Bear Street, Banff AB T1L 1A1		
DOB 01-Apr-1908	Gender M	Alberta Personal Health Care Card Number	Phone (403) 762-1212	Date of last SMMA or Updated SMMA	
Resident's Personal Representative Name			Representative Address	Representative Phone	
Allergies N/A			Conditions Asthma, unspecified, with stated status asthmaticus		
<input type="checkbox"/> Chronic Diseases - Hypertensive Disease <input type="checkbox"/> Chronic Diseases - Diabetes Mellitus <input type="checkbox"/> Chronic Diseases - COPD <input type="checkbox"/> Chronic Diseases - Asthma <input type="checkbox"/> Chronic Diseases - Heart Failure <input type="checkbox"/> Chronic Diseases - Ischaemic Heart Disease <input type="checkbox"/> Chronic Diseases - Mental Disorders			List of Schedule 1 Drugs and/or Insulin Paxil		

INFORMATION FOR ASSESSMENT

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 affect 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, tobacco, alcohol usage
Any other health information that a reasonable Clinical Pharmacist would require to perform the Pharmacy Service



(SMMA) Initial Assessment

Has a CACP, SMMA or Physician CPP ever been completed for this Resident	Yes	No	Has a CACP been completed for this Resident in this Service Year	Yes	No
Have copies been obtained	Yes	No			

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 Potential Adverse Events(if any)

Appropriate Response(s) to Drug Therapy Problem(s) and Potential Adverse Events(if any)

Agreed Goals Of Medication Therapy

Progress Monitoring Plan

General Comments

LOCATION OF THE ASSESSMENT

Name	Address



(SMMA) Initial Assessment

Declaration and Consent of Resident/Resident's Personal Representative (if applicable)

I hereby confirm that:

- I have reviewed and discussed this SMMA/Updated SMMA with the Clinical Pharmacist who prepared it;
- I understand and accept the goals and potential risks of the medication therapy as outlined in this SMMA/Updated SMMA; and
- I have been provided with a copy of this SMMA/Updated SMMA.

Date

Declaration of Clinical Pharmacist

- I have personally seen and conducted an Assessment on Dukes, George for the purpose of preparing, documenting and reviewing this SMMA/Updated SMMA in accordance with the requirements set out in the Compensation Plan for Pharmacy Services

Date

Kroll

Registration #:

Additional Prescribing Authority: Yes No

OTHER PROFESSIONAL INVOLVED IN CARE

Name	Title	Phone



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**.
4. The **(SMMA) Initial Assessment** screen will display the scanned image of the completed Medication Review. Scanned Medication Reviews are also viewable from **Patient Documents**.

Medication Review View

(SMMA) Initial Assessment Close

Created **30-Jul-2014 02:34 PM** Status **Completed Paper** Fee Status **Claimed** Fee Rx **1087678**

2014-07-30 2:39 PM

Zoom 95.3 %

(SMMA) Initial Assessment

(SMMA) Initial Assessment

Personal Medication Record of Dukes, George		Address 110 Bear Street, Banff AB T1L 1A1	
DOB 01-Apr-1908	Gender M	Current personal health care administrator	Phone (403) 762-1212
Allergies N/A		F0000000 Asthma, unspecified, with late phase asthmatus	
<input type="checkbox"/> Chronic Diseases - HIV/AIDS Disease <input checked="" type="checkbox"/> Chronic Diseases - Diabetes Mellitus <input type="checkbox"/> Chronic Diseases - COPD <input type="checkbox"/> Chronic Diseases - Asthma <input type="checkbox"/> Chronic Diseases - Heart Failure <input type="checkbox"/> Chronic Diseases - Ischaemic Heart Disease <input type="checkbox"/> Chronic Diseases - Mental Disorders		List of Schedule 10 Drugs and/or Insulin None	

INFORMATION FOR ASSESSMENT

Symptoms or signs or diseases

Treatment history for the condition, including but not limited to over-the-counter

Other health care products used and/or services or other products being used that may affect 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, tobacco, alcohol usage

Any other health conditions that are associated with a pharmacist who is required to perform the pharmacy service

Has a CACR (SMMA) or Physician CRP ever been completed for the Resident	Yes	No	Has a CACR been completed for the Resident in the Service Year	Yes	No
Have copies been obtained	Yes	No			

Page 1 of 3

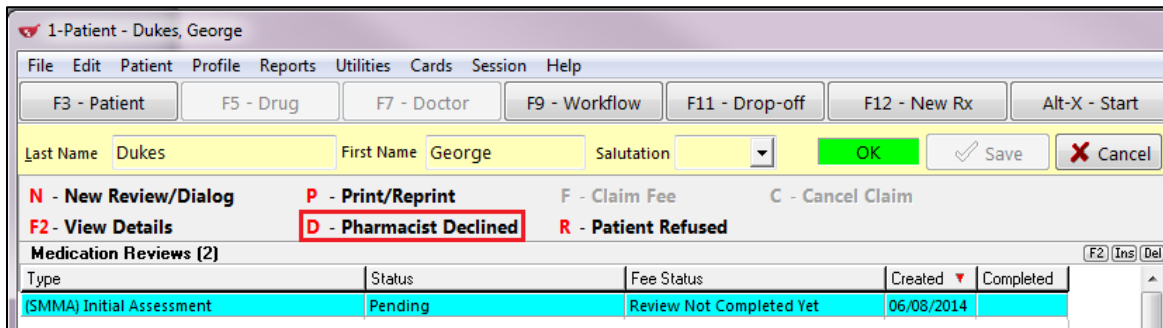
Declined and Refused Medication Reviews

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

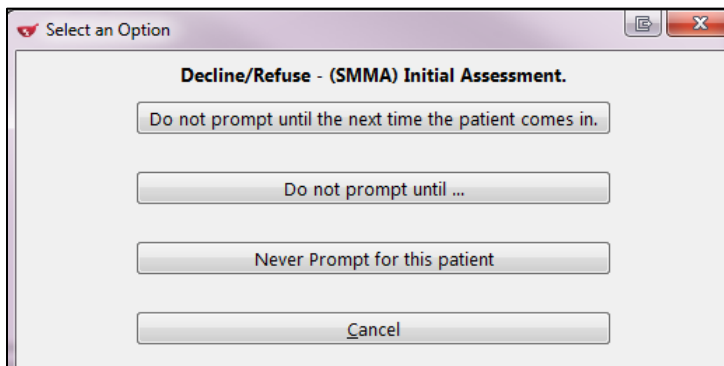
NOTE: The medication review records that are declined by the pharmacist or patient refused can also be noted from the Medication Review queue on the F9-Workflow screen.

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**.



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

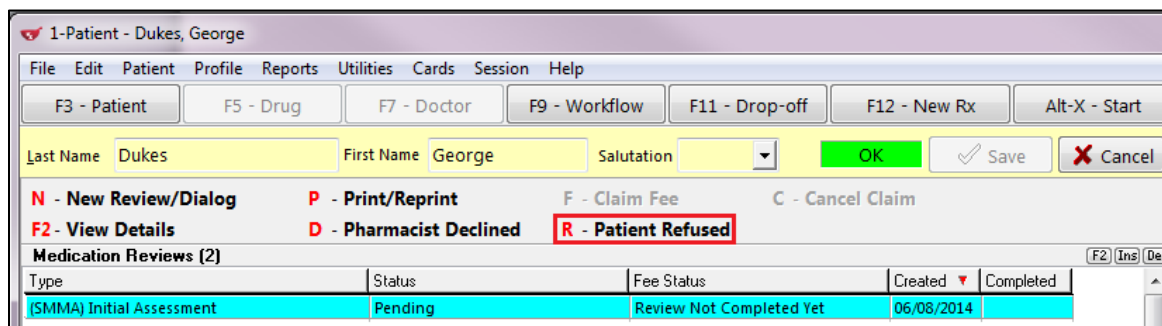


- If you select **Do not prompt until the next time the patient comes in**, no further action is required until the next time the patient visits the pharmacy.
- If you select **Do not prompt until...** you will be prompted to specify the next time you want to be prompted for the patient’s Medication 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 - Workflow F11 - Drop-off F12 - New Rx Alt-X - Start

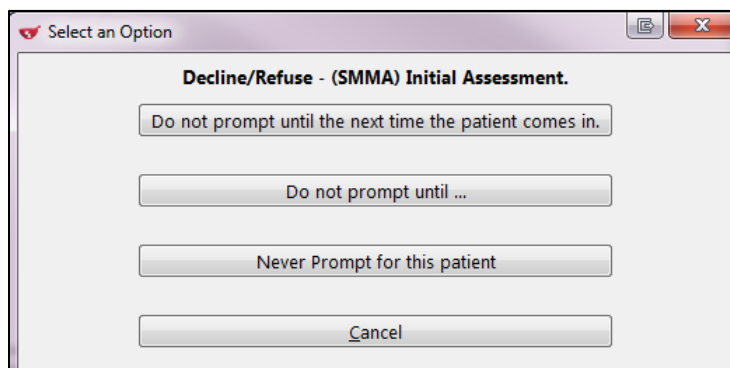
Last Name Dukes First Name George Salutation OK Save Cancel

N - New Review/Dialog P - Print/Reprint F - Claim Fee C - Cancel Claim
 F2 - View Details D - Pharmacist Declined **R - Patient Refused**

Medication Reviews (2)

Type	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 Option

Decline/Refuse - (SMMA) Initial Assessment.

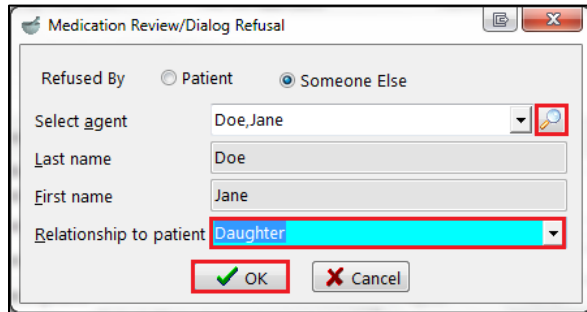
Do not prompt until the next time the patient comes in.

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/Dialog Refusal

Refused By Patient Someone Else

Select agent: Doe, Jane

Last name: Doe

First name: Jane

Relationship to patient: Daughter

OK Cancel

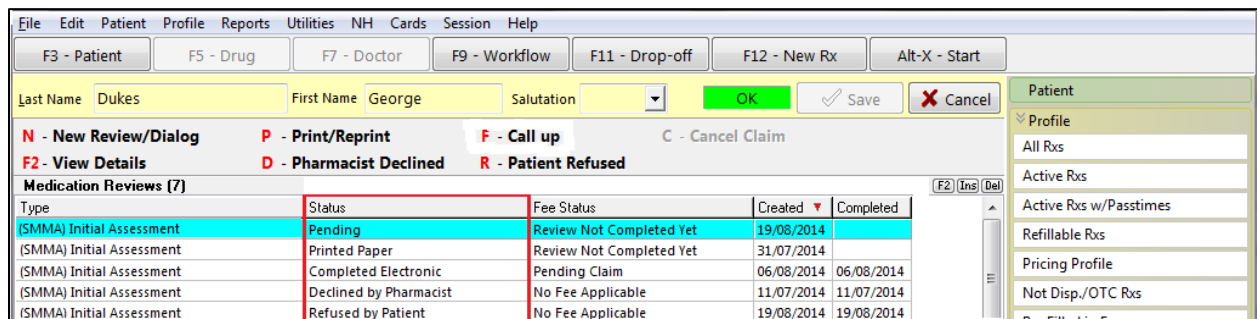
- No further action is required until the next time the patient visits the pharmacy.
- If you select **Do not prompt until...** you will be prompted to specify the next time you want to be prompted for the patient’s Medication Review. Complete the form and click **OK**.
- If you select **Never Prompt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



Type	Status	Fee Status	Created	Completed
(SMMA) Initial Assessment	Pending	Review Not Completed Yet	19/08/2014	
(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
(SMMA) Initial Assessment	Declined by Pharmacist	No Fee Applicable	11/07/2014	11/07/2014
(SMMA) Initial Assessment	Refused by Patient	No Fee Applicable	19/08/2014	19/08/2014

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.

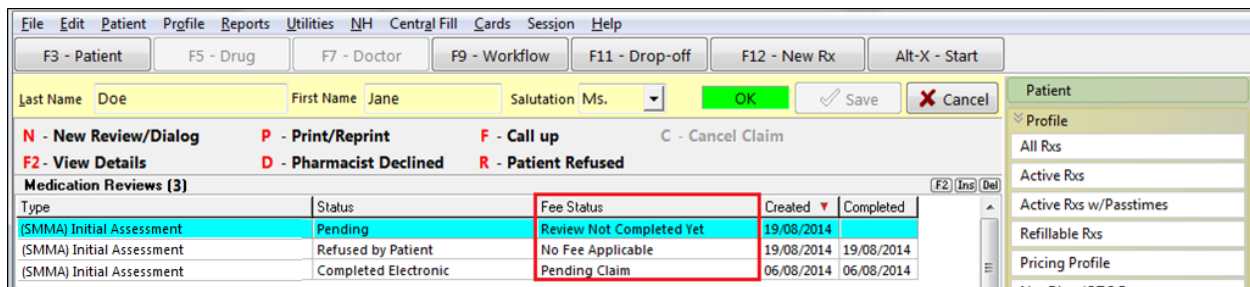
Declined by Pharmacist

Reviews that have been declined by the pharmacist.

Refused by Patient

Reviews that have been refused by the patient.

Fee Statuses



Type	Status	Fee Status	Created	Completed
(SMMA) Initial Assessment	Pending	Review Not Completed Yet	19/08/2014	
(SMMA) Initial Assessment	Refused by Patient	No Fee Applicable	19/08/2014	19/08/2014
(SMMA) Initial Assessment	Completed Electronic	Pending Claim	06/08/2014	06/08/2014

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.