Medication Reviews

Prince Edward Island

Contents

Medication Reviews - Prince Edward Island

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.
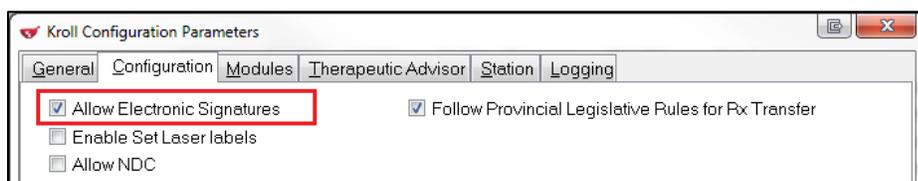
Configuration

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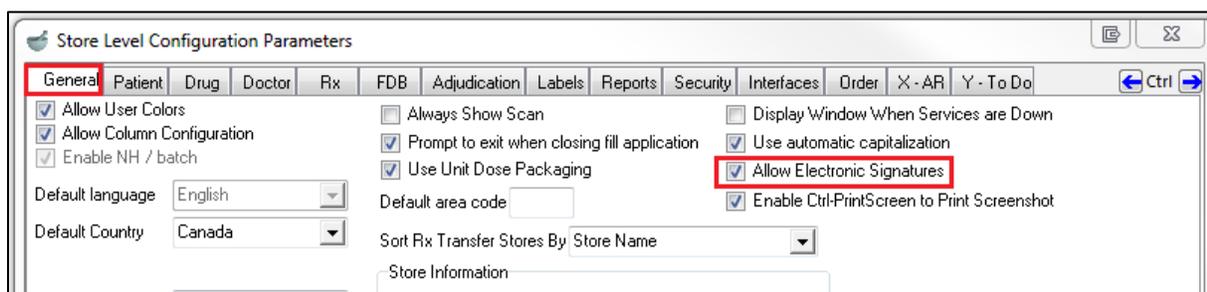
Configuring Electronic Signatures

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.
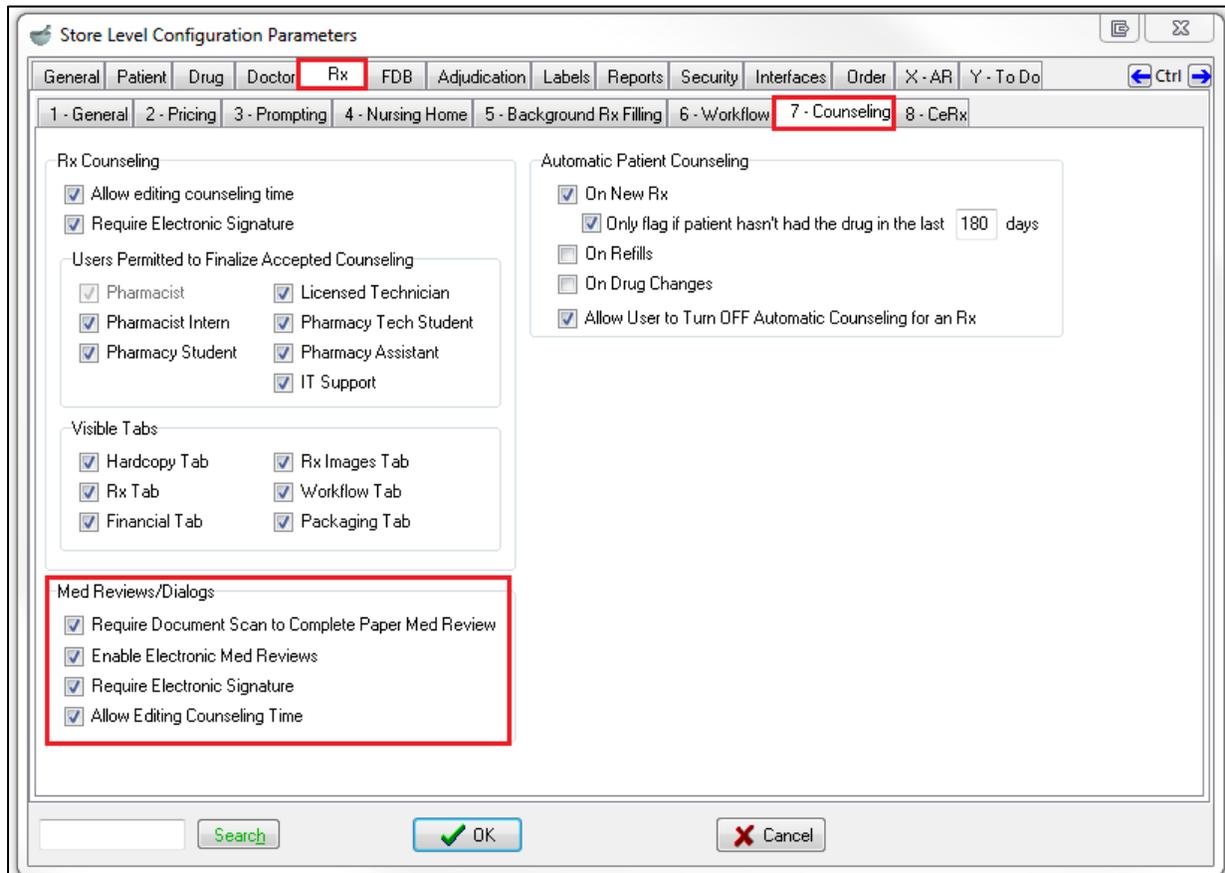

1. Go to **File** > **Configuration** > **Store** > **General**.

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**.
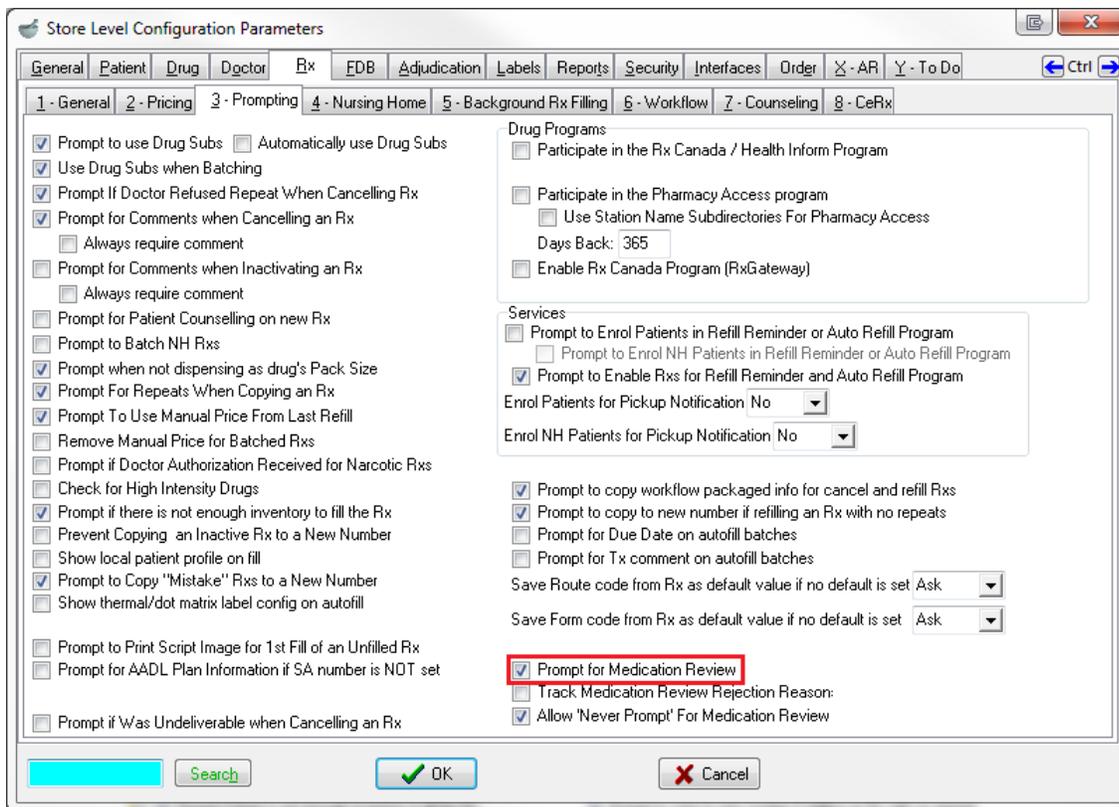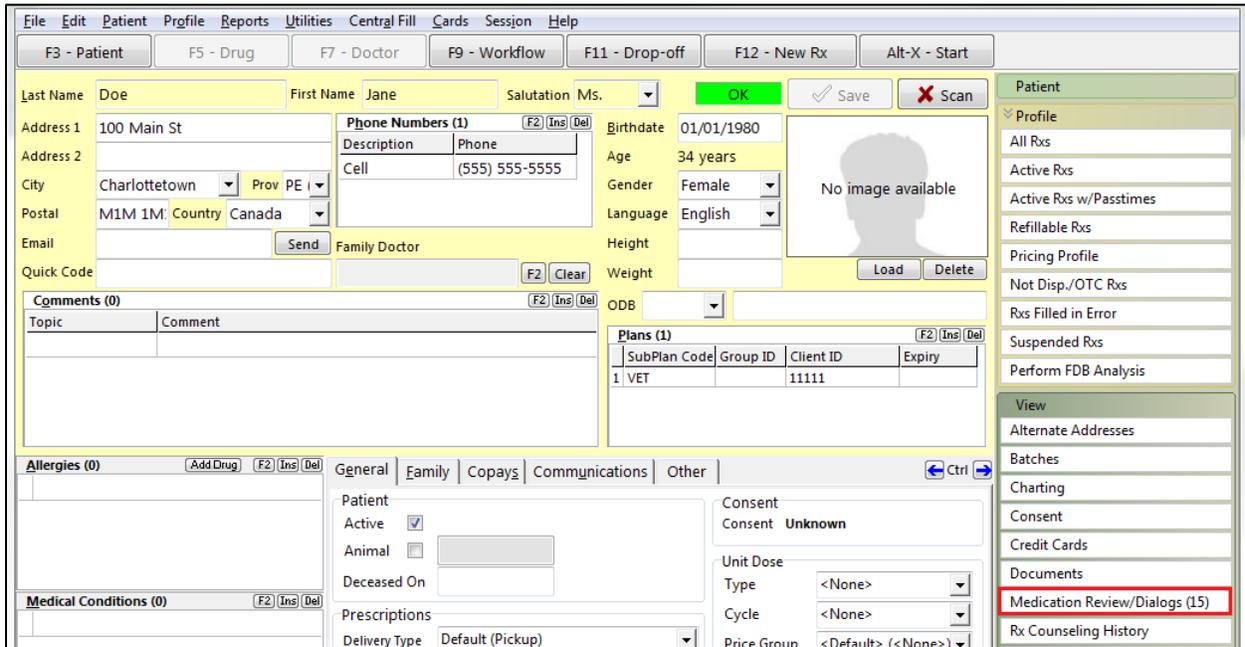
When the option '**Prompt for Medication Review**' is enabled, the system screens each patient for Medication Review eligibility every time an Rx is processed. If the patient is eligible, the user is prompted and presented with a number of options as shown below.
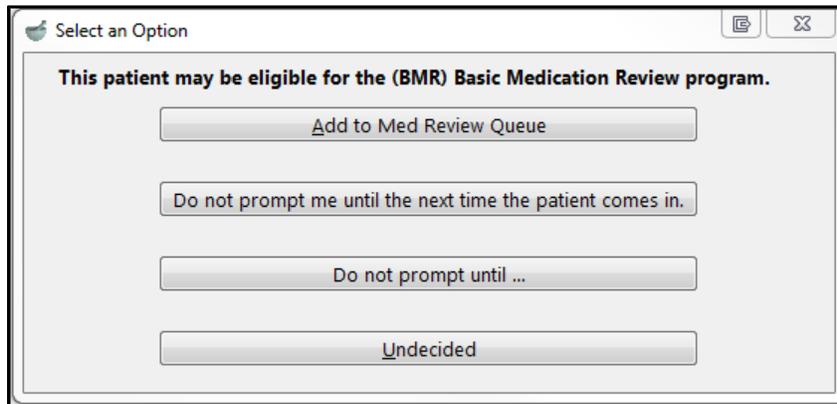
- **Add to Med Review Queue**: Selecting this option adds the Med Review record to the Medication Reviews queue which can be accessed from the **Patient** record or **F9 – Workflow**. See section 'Completing Medication Review 'Saved for Later'' for further details.

- **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.
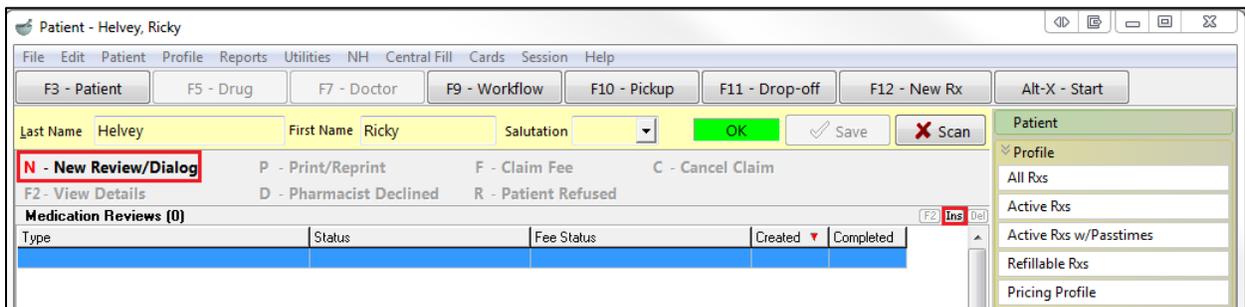
Creating an Electronic Medication Review (Manual)

1. Bring up the patient card using the **F3 Patient** search.

2. Select **Medication Review/Dialogs** from the right navigation pane.

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

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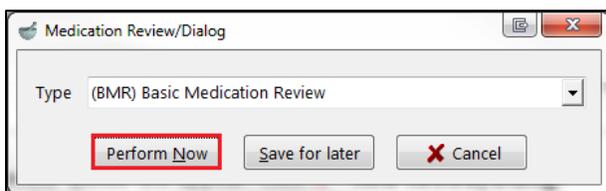
5. The **Medication Review Rx Selection** screen will appear. Rxs under the **Pre-Selected** tab are selected by default; Rxs on the other tabs are not. Proceed through each tab and check the Rxs you want included in the report. When you are finished, click **OK**.
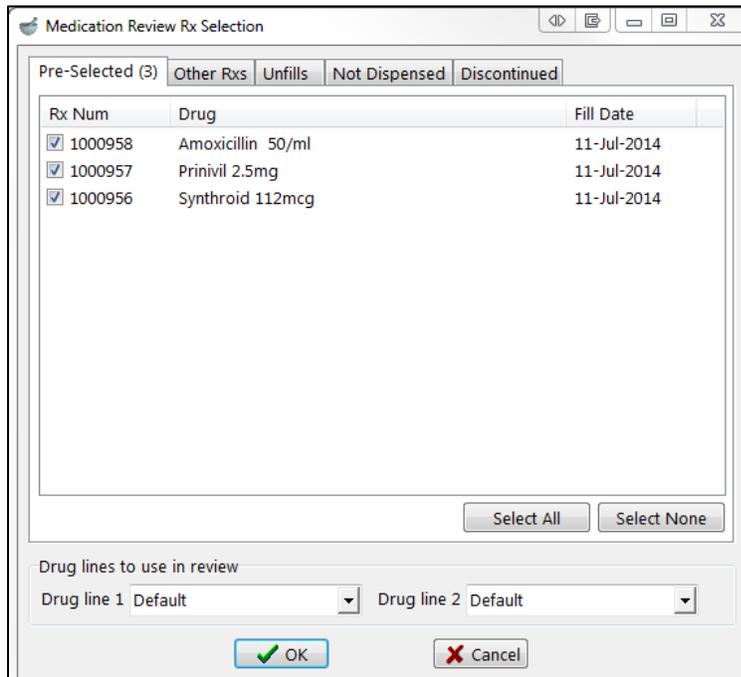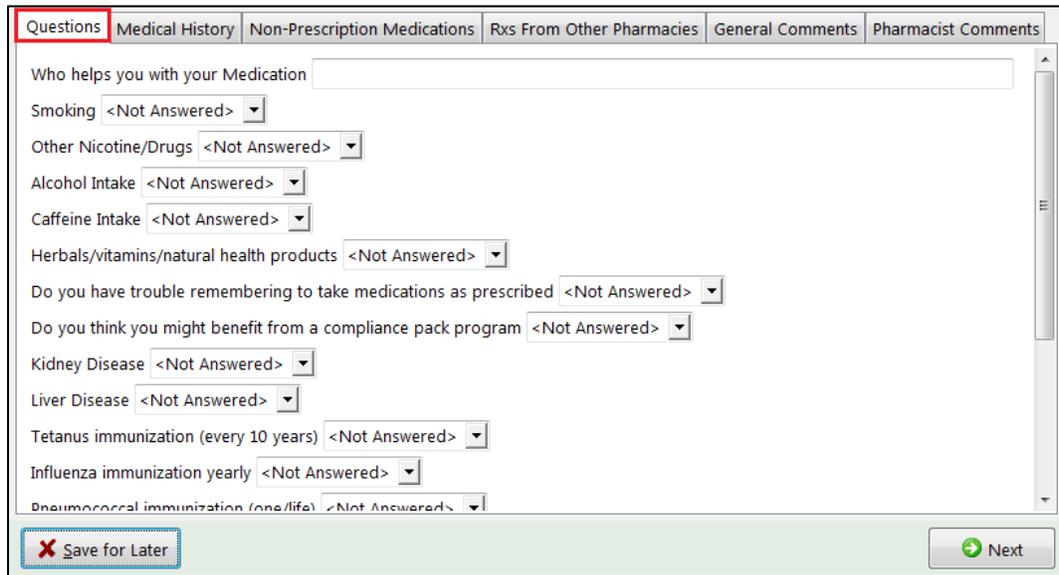

6. The **Medication Review Rx Selection** screen will appear. Click **Next** to proceed through the tabs, completing the required fields as you go.

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 **(BMR) Basic Medication Review** 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.

Medical History

The **Medical History** tab displays the medications that have been selected on the **Medication Review Rx Selection** screen.
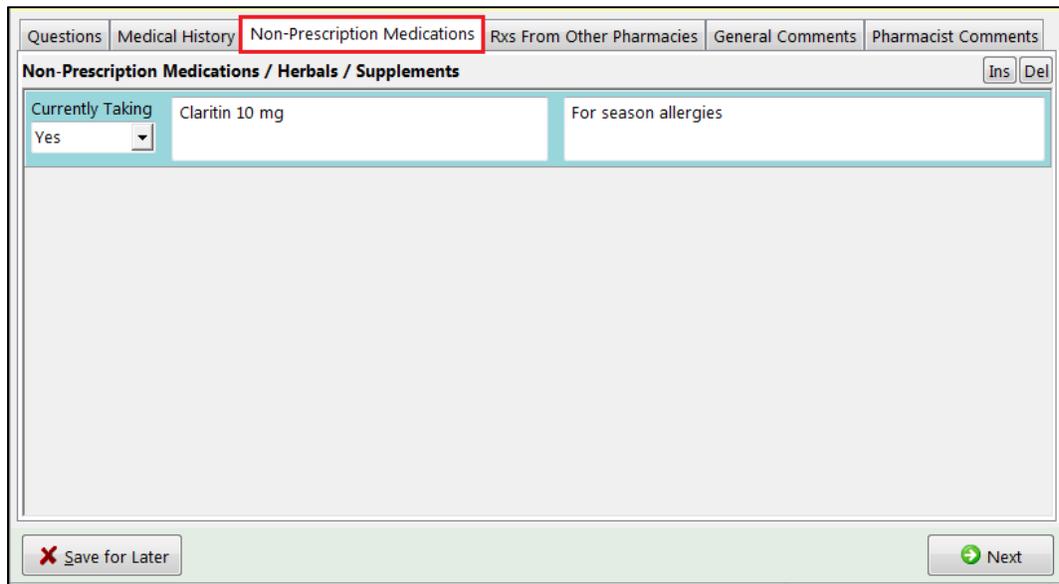
For each medication listed:

- 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.

- 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.
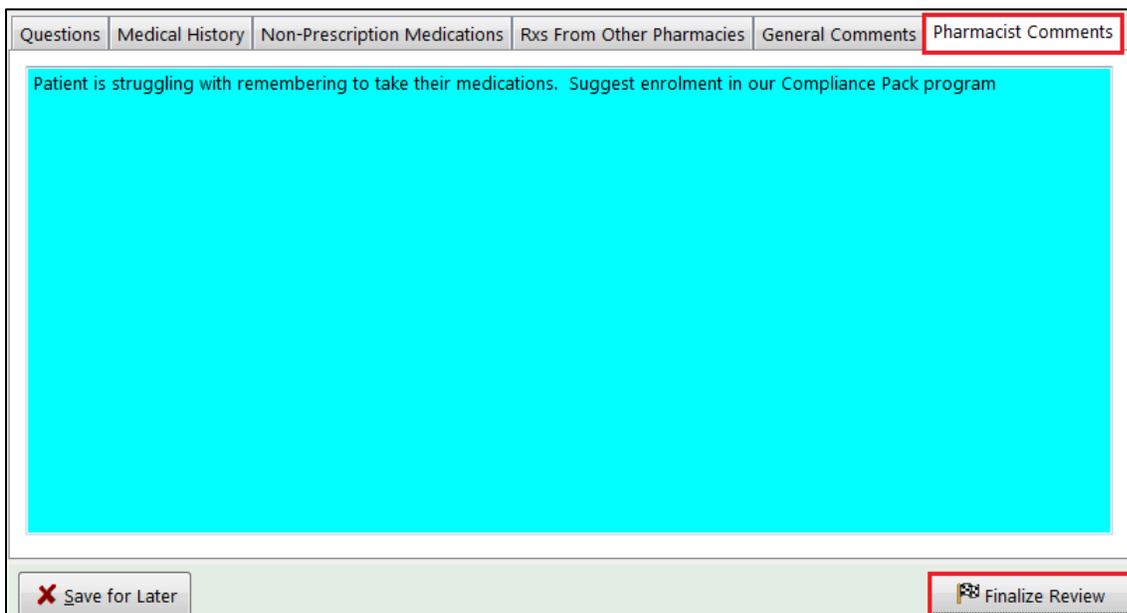
General Comments

The **General Comments** tab provides space to record any comments you want included on the report printout.
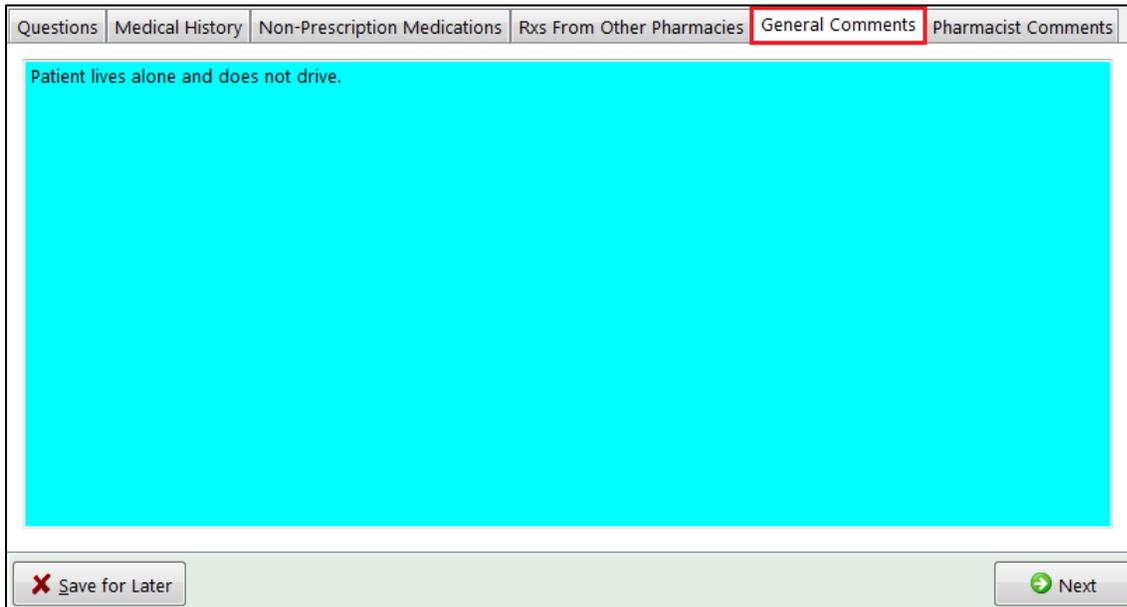
Questions	Medical History	Non-Prescription Medications	Rxs From Other Pharmacies	General Comments	Pharmacist Comments

Patient lives alone and does not drive.

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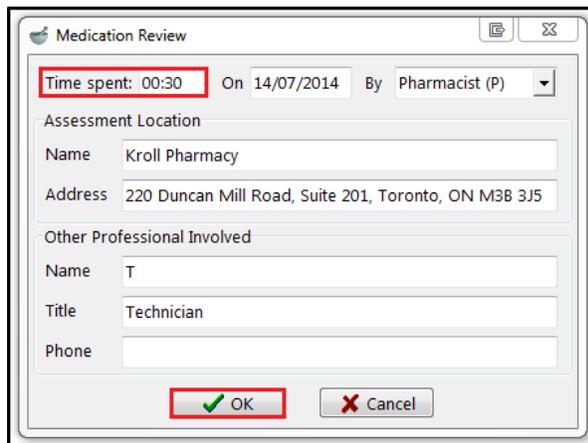
Questions	Medical History	Non-Prescription Medications	Rxs From Other Pharmacies	General Comments	Pharmacist Comments

Patient is struggling with remembering to take their medications. Suggest enrolment in our Compliance Pack program

✗ Save for Later   🏁 Finalize 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.

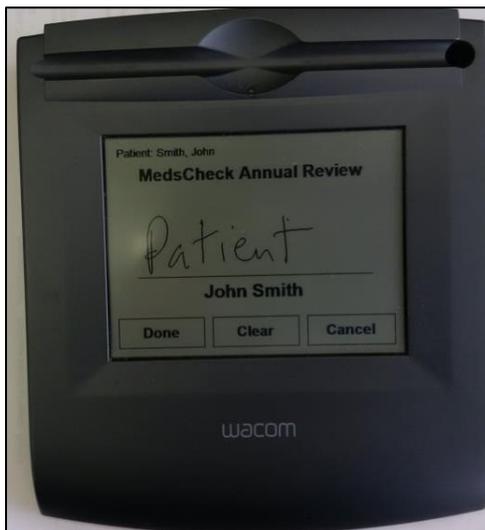   When you are finished, click **OK**.

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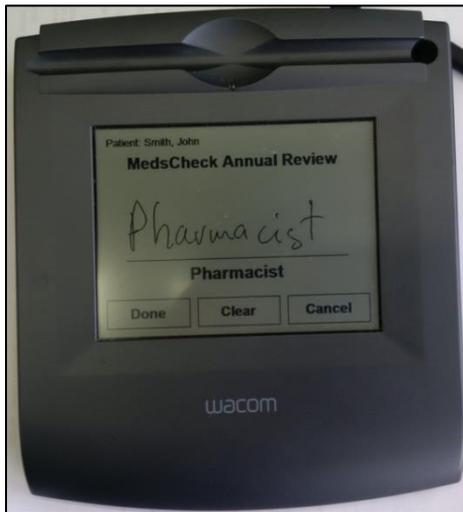
9. Have the patient sign his or her name on the electronic signature tablet. Click the **OK** button on the signature tablet.

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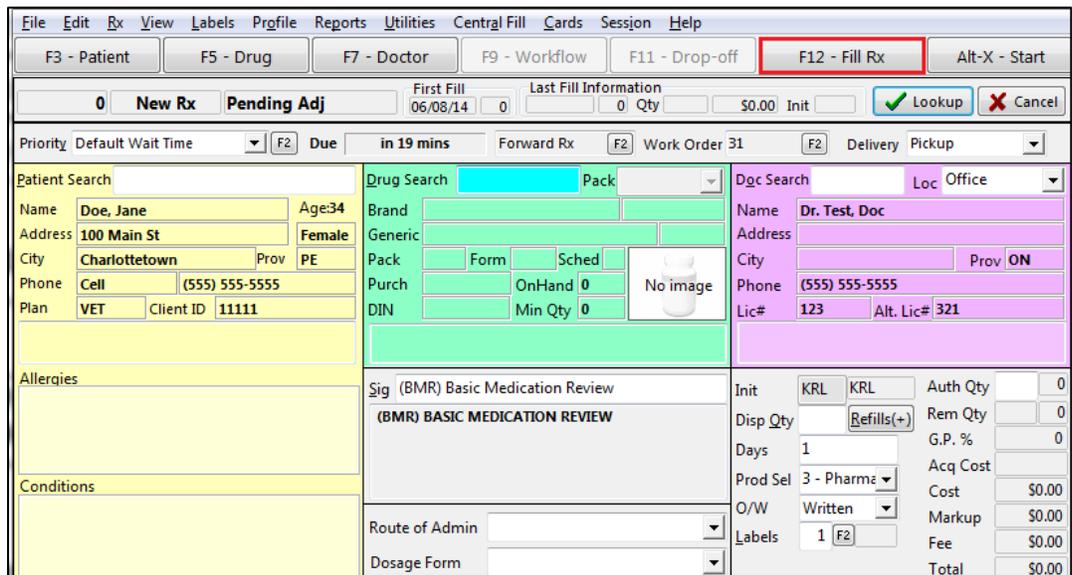
13. The **Medication Review report** print form will appear. Select the appropriate print options and click **Print** and provide this copy to the patient.

Billing a Medication Review

14. Once printing is complete, the **Fee For Service** Claim will automatically populate in the F9-Professional Services Queue. Press F to bill the claim. If necessary, perform a doctor search to locate the pharmacist to use as the prescriber and ensure all 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.
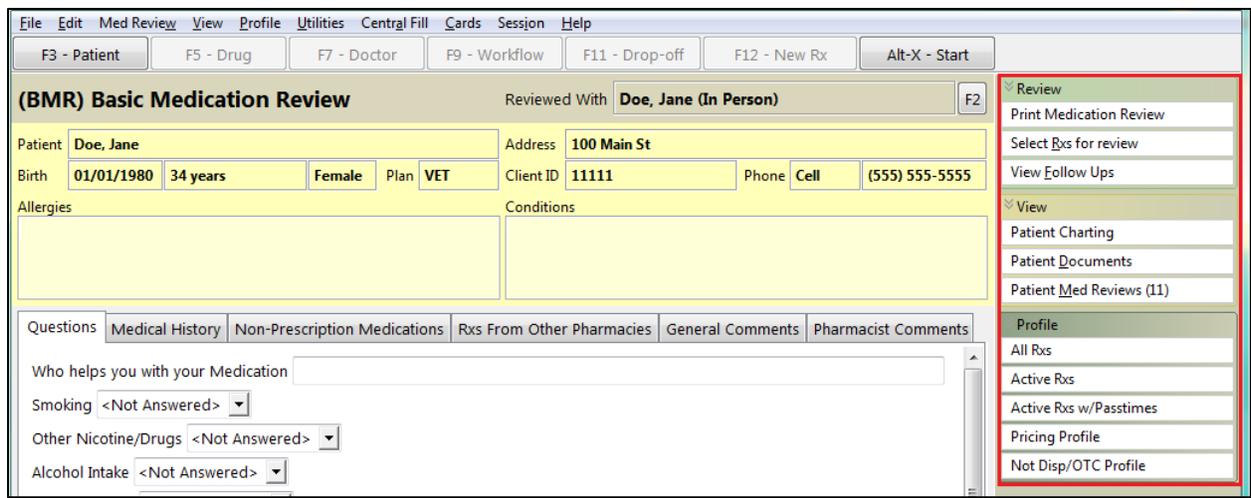
15. Click **F12 - Fill Rx**. The claim will be transmitted to the appropriate party for payment.

Medication Review Options

Several Medication Review options are available from the right navigation pane on the **(BMR) Basic Medication Review** 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.
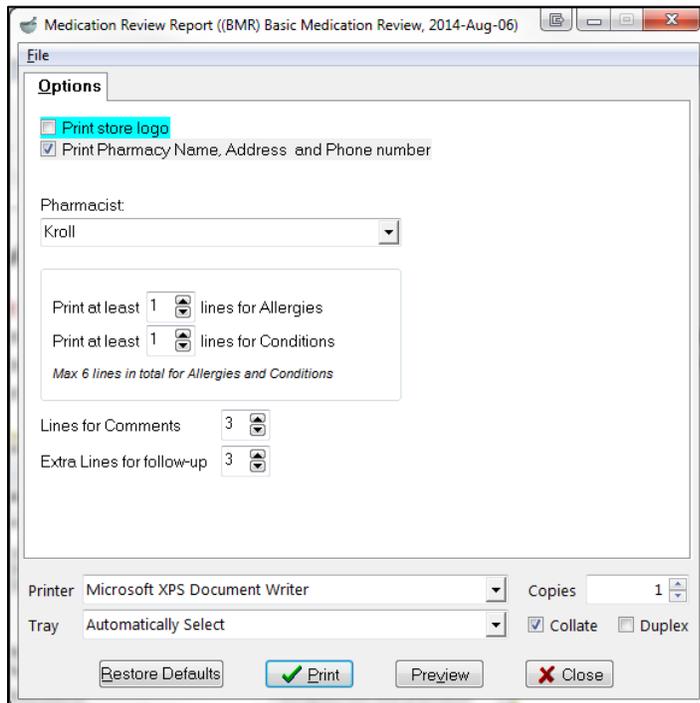
Select Rxs for review

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.
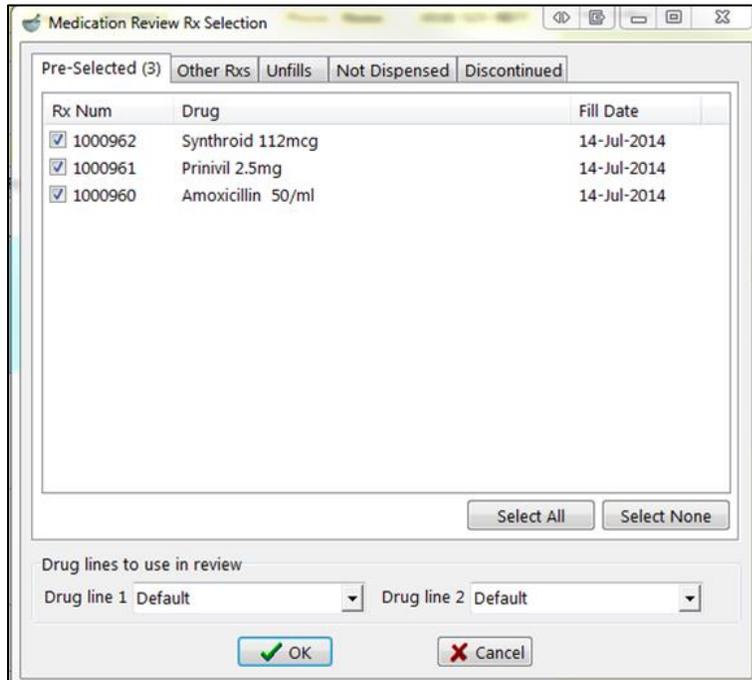
View Follow Ups

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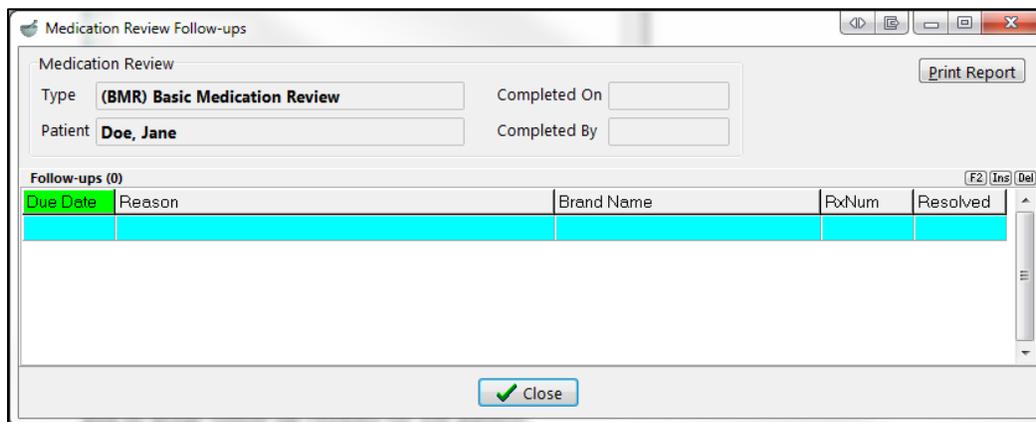
To add a follow-up, click **Ins** and complete the **Medication Review Follow-up** screen. When you are finished, click **Save**.
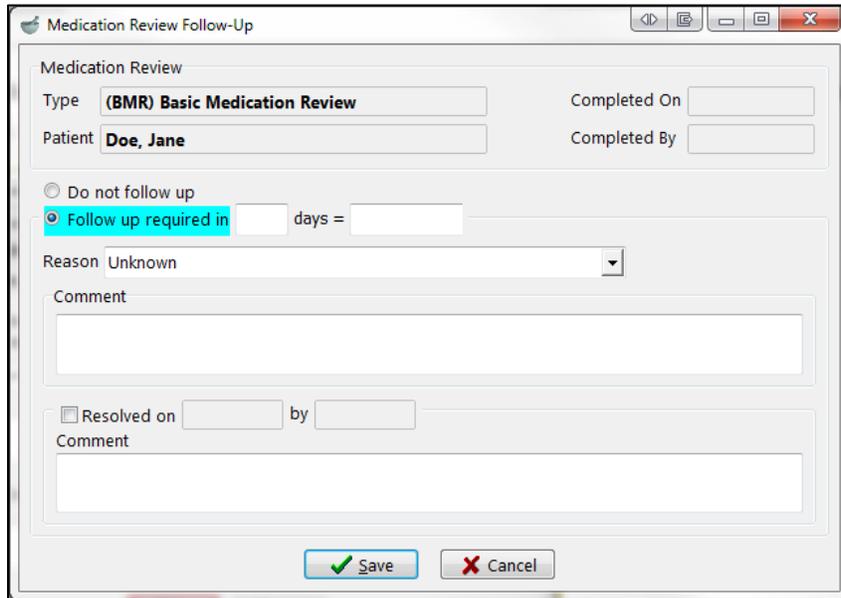
View

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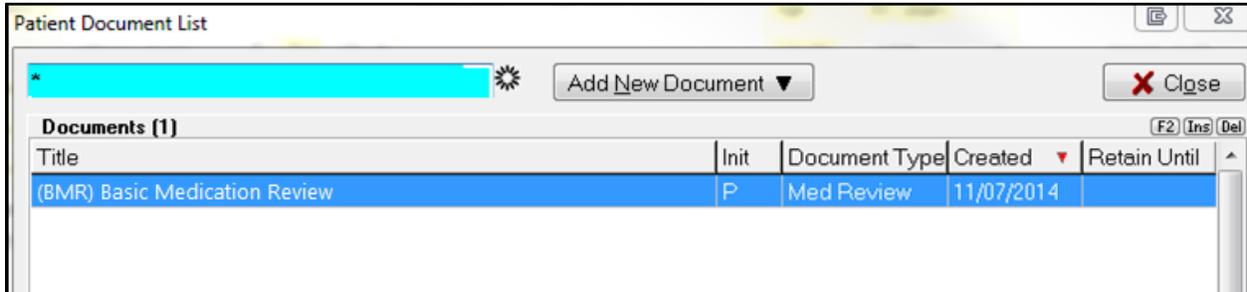
Use the **F2**, **Ins**, and **Del** buttons to modify, insert, or delete a patient document. Click **Close** to exit the screen.
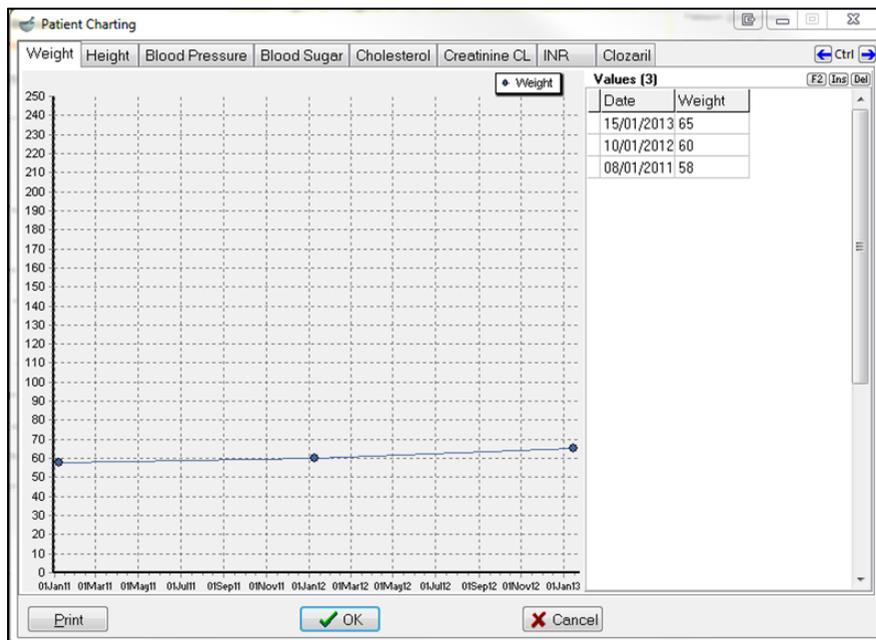
Patient Medication Reviews

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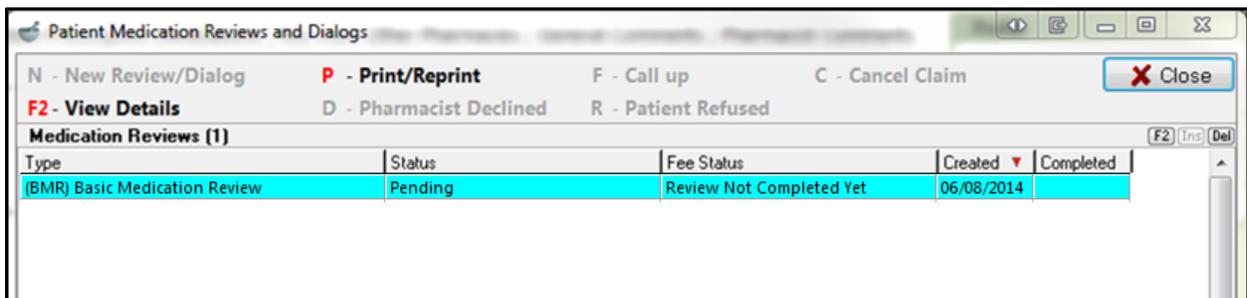
Double-click a Medication Review to view its details. Click **Close** to exit the screen.

Profile

The **Profile** menu on the **Medication Review Annual Review** 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.
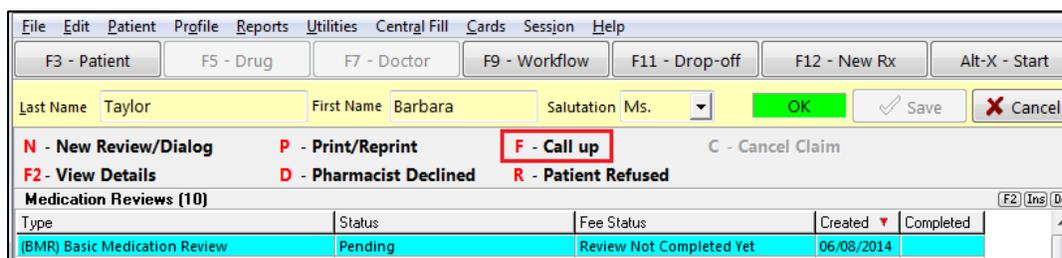
b) The Medication Reviews queue appears with all the Med Review records that are pending review.

c) Select the Medication Review record you want to complete and click **F - Call Up**.

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**.

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

Sample Electronic Medication Review Report

(BMR) Basic Medication Review

PEI PharmaCheck

Name	Gender	Date of Birth
Doe, Jane	Female	01-Jan-1980

Address	Phone	PHN
100 Main St, Charlottetown PE M1M 1M1		

Family Doctor	Family Doctor Phone	Family Doctor Fax

Allergies

Conditions

Smoking	Alcohol Intake	Caffeine Intake	Other Nicotine/Drugs
☐ No ☐ Yes, # cigarettes/day:	☐ No ☐ Yes, # drinks/week:	☐ No ☐ Yes, # cups/day:	☐ No ☐ Yes:

Health Information

	Yes	No		Yes	No
Herbals/vitamins/natural health products	Yes	No	Do you have trouble remembering to take medications as prescribed	Yes	No
Kidney Disease	Yes	No	Liver Disease	Yes	No
Tetanus immunization (every 10 years)	Yes	No	Influenza immunization yearly	Yes	No
Pneumococcal immunization (one/life)	Yes	No	Do you think you might benefit from a compliance pack program	Yes	No

Other immunizations/travel vaccines

What is your biggest concern about your medications today

Name of Medication Brand/Generic	Strength/Dose	How to take this Medication (frequency, time of day, etc.)	Purpose	Comments	Prescriber
Amatine	2.5mg - 30 TAB	TAKE 1 TABLET ONCE DAILY			Dr. Test, Doc
642 Tablets	65mg - 30 TAB	TAKE 1 TABLET ONCE DAILY			Dr. Test, Doc

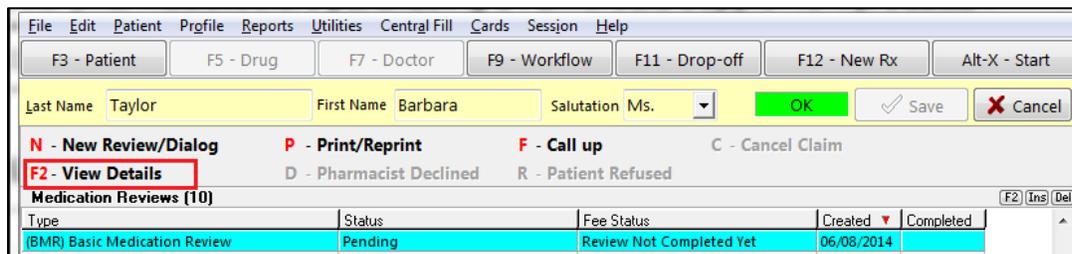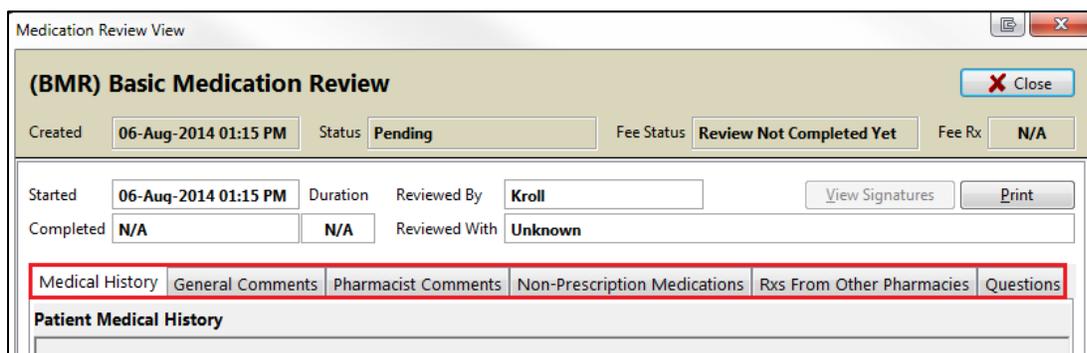CANADIAN PHARMACISTS ASSOCIATION ASSOCIATION DES PHARMACIENS DU CANADA

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 **Medication Review View** 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**.

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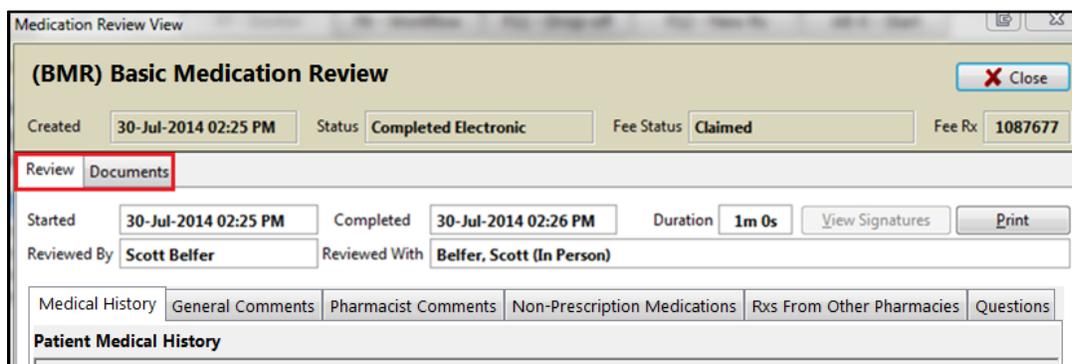
5. Click **Print** to print the Medication Review.

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**.
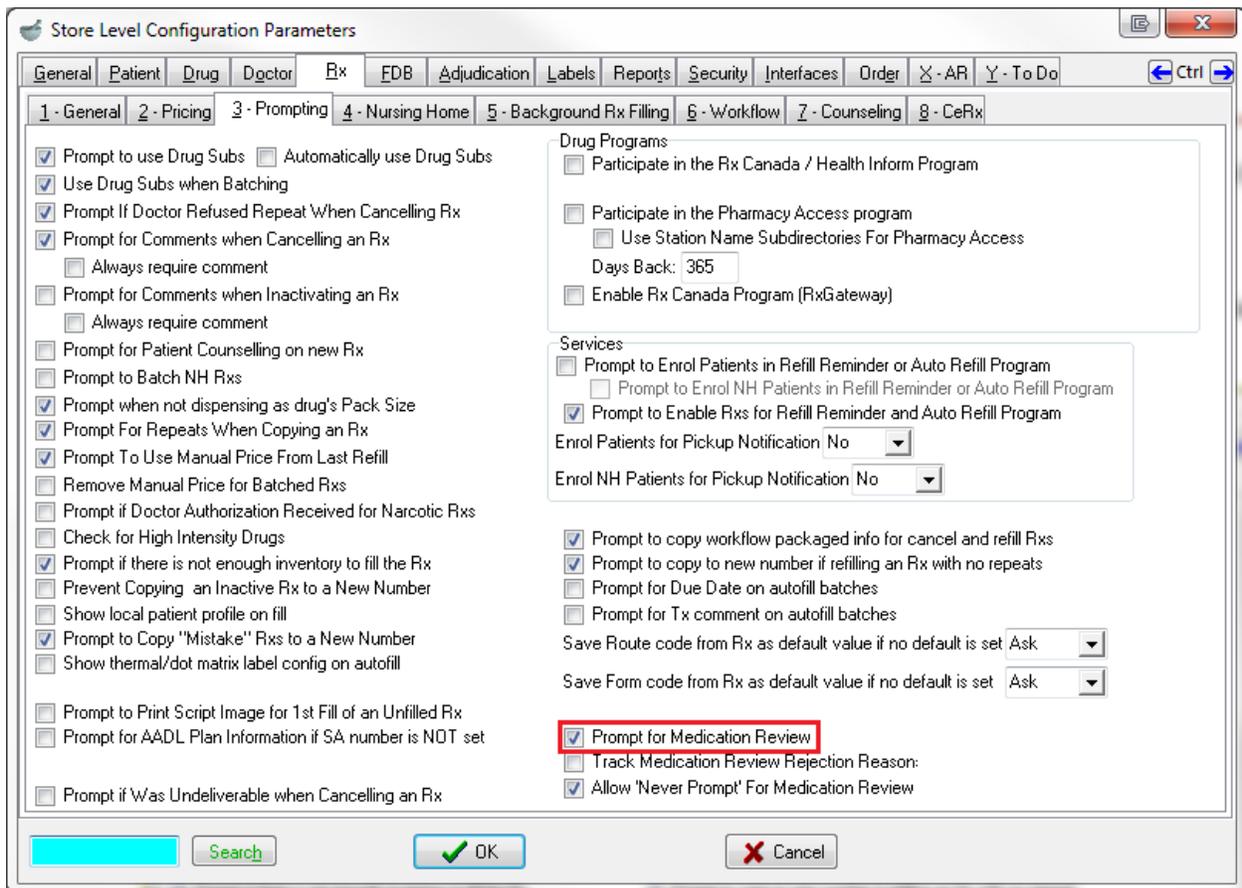
When the option '**Prompt for Medication Reviews**' is enabled, the system screens each patient for Medication Review eligibility every time an Rx is processed. If the patient is eligible, the user is prompted and presented with a number of options as shown below.
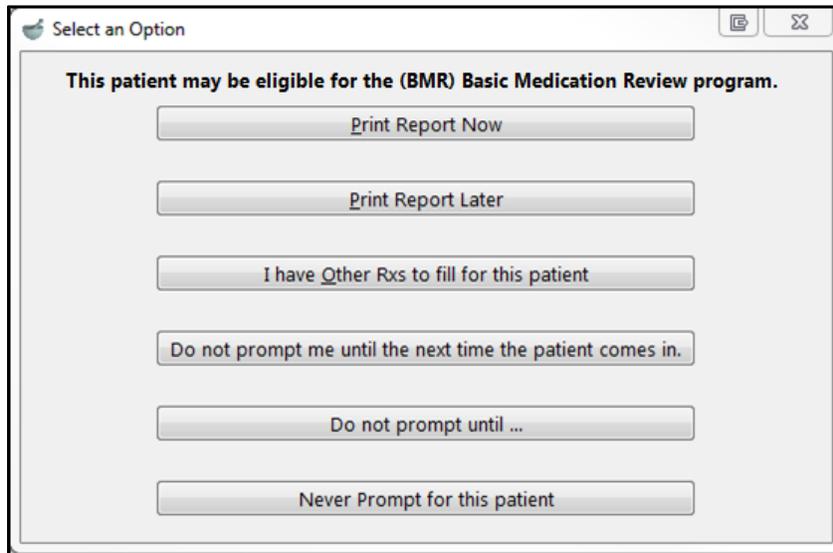
- **Print Report Now**: This will call up the Medication Review report so you can select the items you would like to print on the report.

- **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 Review 'Saved for Later'' for further details.
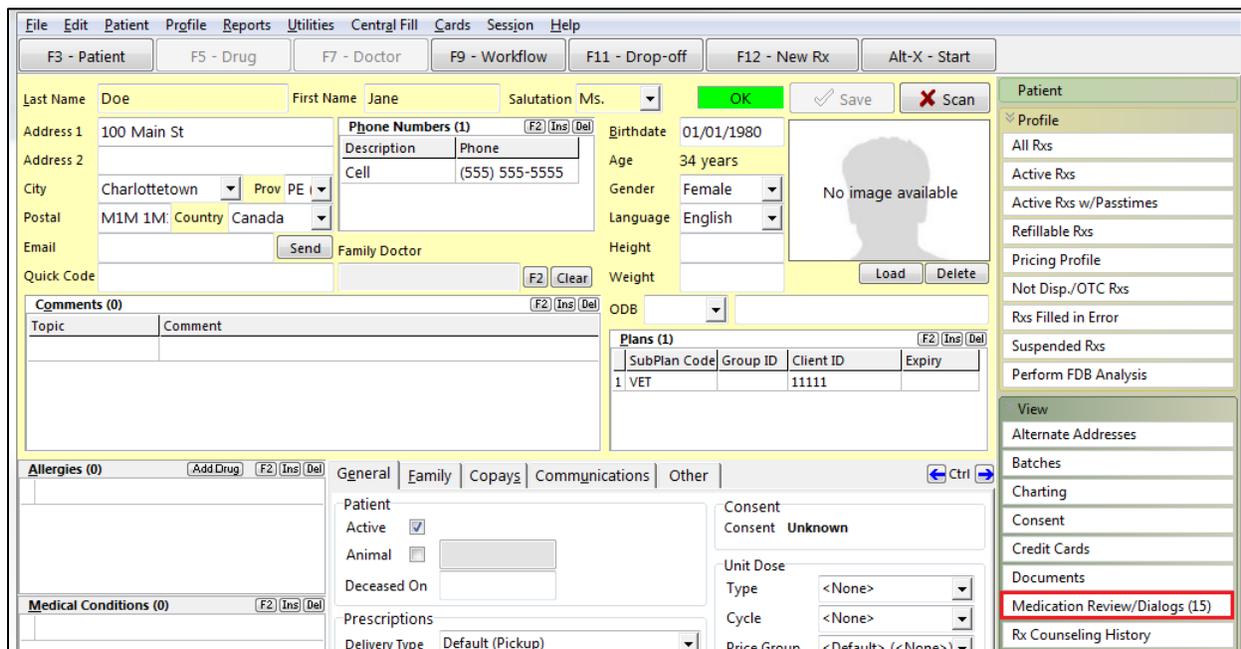
- **I have Other Rxs to fill for this patient**: This will allow you to continue filling more Rxs for the patient before printing the report.

- **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.
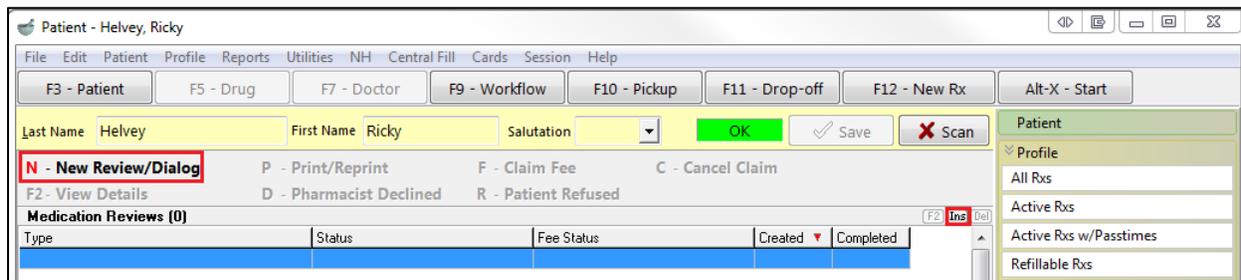
Creating a Paper Medication Review (Manual)

1. Bring up the patient card using the **F3 Patient** search.

2. Select **Medication Review/Dialogs** from the right navigation pane.

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

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**.

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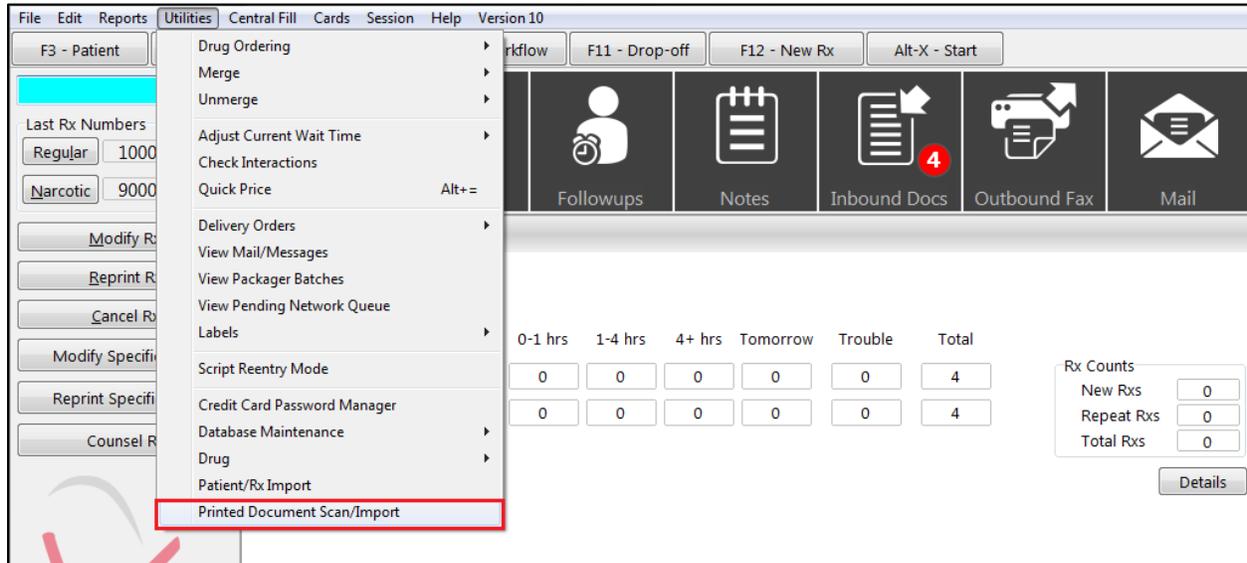
9. The **Import Scanned Documents** screen will appear. Place the report pages face down on the scanner hopper. Check **Scan both sides of paper** if you are scanning pages with information on both sides and your scanner supports dual side scanning. Click **Start Scanning**.

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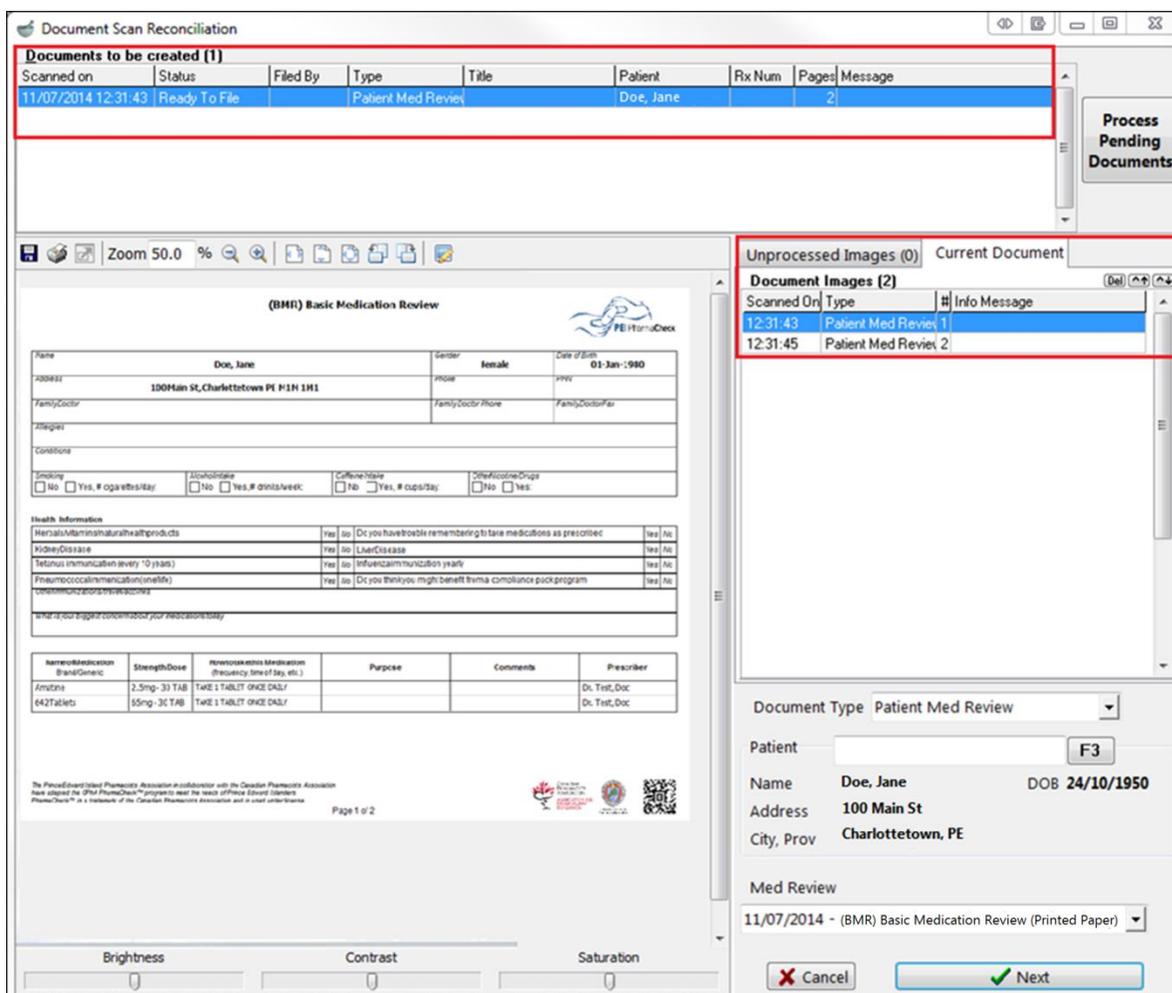
14. Click **F12 - Fill Rx**. The claim will be transmitted to the appropriate party for payment.

Completing Medication Review 'Saved for Later'

1. To call up Medication Reviews '**saved for later**', do one of the following:

Patient Card

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 with all the Medication Review records that are pending review. Select the Medication Review record you want to complete and click **F - Call Up**.

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**.

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

Sample Paper Medication Review Report

(BMR) Basic Medication Review

PEI PharmaCheck

Name	Taylor, Barbara	Gender	Female	Date of Birth	01-Jan-1980

Address	100 Main St, Charlottetown PE M1M 1M1	Phone		PHN	

Family Doctor		Family Doctor Phone		Family Doctor Fax	

Allergies

Conditions
Asthma, unspecified, with stated status asthmaticus; Hypertension secondary to endocrine disorders, benign or unspecified

Smoking	Alcohol Intake	Caffeine Intake	Other Nicotine/Drugs
☐ No ☐ Yes, # cigarettes/day:	☐ No ☐ Yes, # drinks/week:	☐ No ☐ Yes, # cups/day:	☐ No ☐ Yes:

Health Information

	Yes	No		Yes	No
Herbals/vitamins/natural health products	Yes	No	Do you have trouble remembering to take medications as prescribed	Yes	No
Kidney Disease	Yes	No	Liver Disease	Yes	No
Tetanus immunization (every 10 years)	Yes	No	Influenza immunization yearly	Yes	No
Pneumococcal immunization (one/life)	Yes	No	Do you think you might benefit from a compliance pack program	Yes	No

Other immunizations/travel vaccines

What is your biggest concern about your medications today

Name of Medication Brand/Generic	Strength/Dose	How to take this Medication (frequency, time of day, etc.)	Purpose	Comments	Prescriber
Cyclobenzaprine	10mg - 20 TAB	TAKE 1 TABLET ONCE DAILY			Dr. Test, Doc
292	30mg - 20 TAB	TAKE 1 TABLET ONCE DAILY			Dr. Test, Doc
Clorazepate	15mg - 30 CAP	TAKE 1 TABLET ONCE DAILY			Dr. Test, Doc
Methyldopa	500mg - 30 TAB	TAKE 1 TABLET ONCE DAILY			Dr. Test, Doc
Calcium Chloride Injection 100mg/ml	100mg/ml - 30 ML	TAKE 1 TABLET ONCE DAILY			Dr. Test, Doc

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(BMR) Basic Medication Review

Name of Medication Brand/Generic	Strength/Dose	How to take this Medication (frequency, time of day, etc.)	Purpose	Comments	Prescriber
Apo-Acyclovir	800mg - 20 TAB	TAKE 1 TABLET ONCE DAILY			Dr. Test, Doc
Advil Junior Strength Blue Raspberry	100mg - 30 TAB	*			Dr. Test, Doc
Actonel	30mg - 30 TAB	TAKE 1 TABLET ONCE DAILY			Dr. Test, Doc

General Comments

PATIENT FOLLOWUP

Date	Reason	Comments

Accuracy of this list is dependent on the truthfulness and completeness of information provided by the patient and it remains at all times the patient's responsibility to advise their pharmacist of any change to their medications. By signing this, I consent for my pharmacist to share this medication list with my other health care professionals (present and future) to enhance seamless continuity of care.

_____   _____   _____
Patient Signature   Date   Kroll

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 **Medication Review View** 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**.
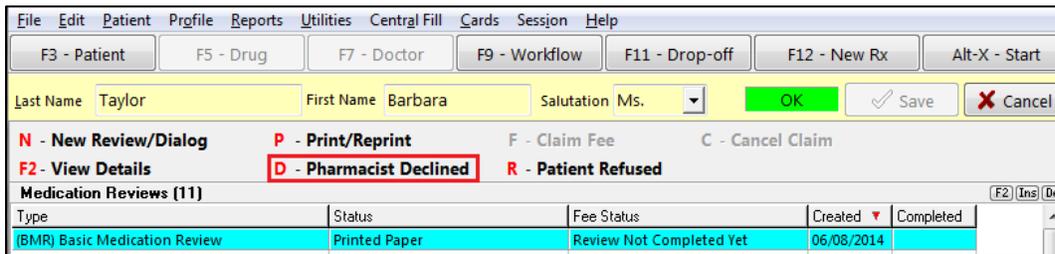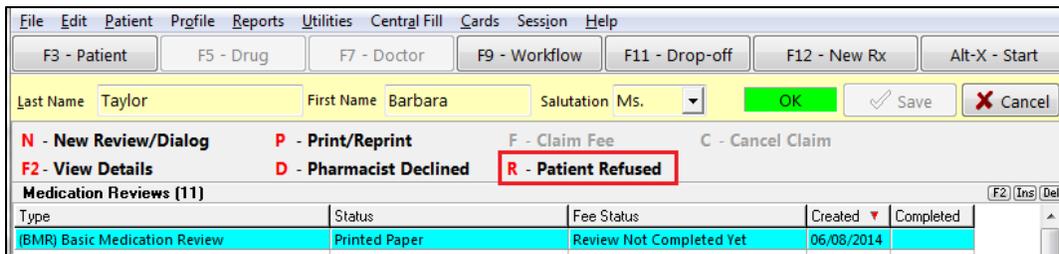

4. Select the appropriate option from the **Decline/Refuse** prompt.
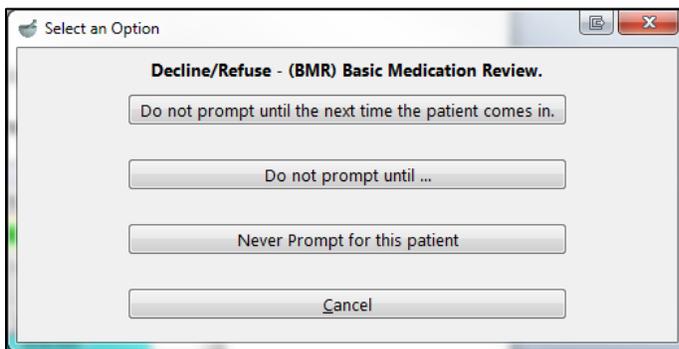
- If you select **Do not prompt until the next time the patient comes in**, no further action is required until the next time the patient visits the pharmacy.

- 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**.

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

- 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**.

  o 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**.

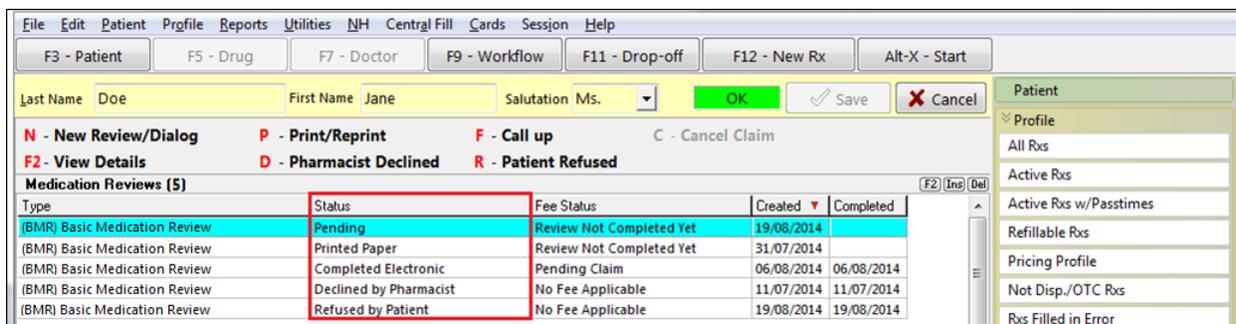 o No further action is required until the next time the patient visits the pharmacy.

- 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 either **refused/declined** by the pharmacist or patient 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

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.

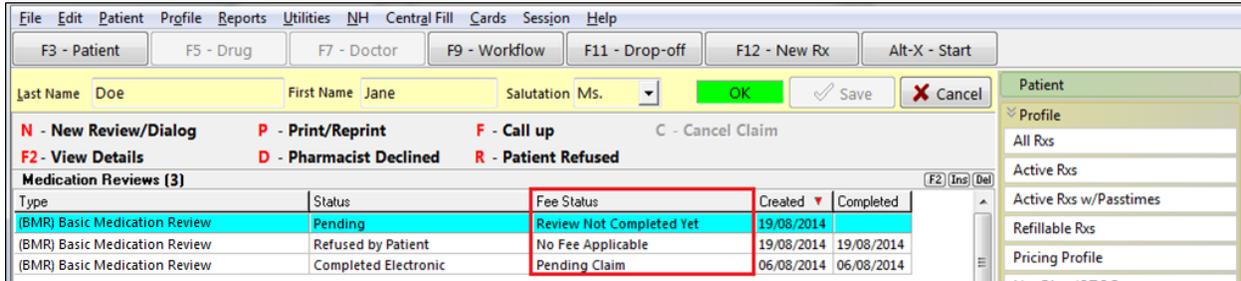**Completed**
Reviews that have been printed and billed.

Declined by Pharmacist
Reviews that have been declined by the pharmacist.

Refused by Patient
Reviews that have been refused by the patient.

Fee Statuses

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.