

Medication Reviews

Prince Edward
Island



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.....	13
Medication Review Options.....	14
Completing Medication Review 'Saved for Later'.....	19
Sample Electronic Medication Review Report.....	20
Viewing a Completed Medication Review.....	21
Paper Medication Reviews.....	23
Configuring the Medication Review Prompt.....	23
Creating a Paper Medication Review (Manual).....	25
Scanning Medication Review Reports.....	27
Billing a Medication Review.....	29
Completing Medication Review 'Saved for Later'.....	29
Sample Paper Medication Review Report.....	30
Viewing a Completed Medication Review.....	32
Declined and Refused Medication Reviews.....	33
Pharmacist Declined.....	33
Patient Refused.....	34
Medication Review Statuses.....	35
Statuses.....	35
Fee Statuses.....	36

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.

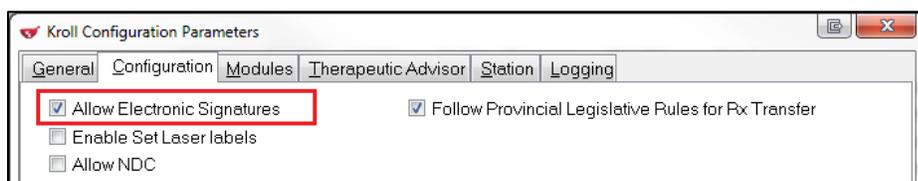
Configuration

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

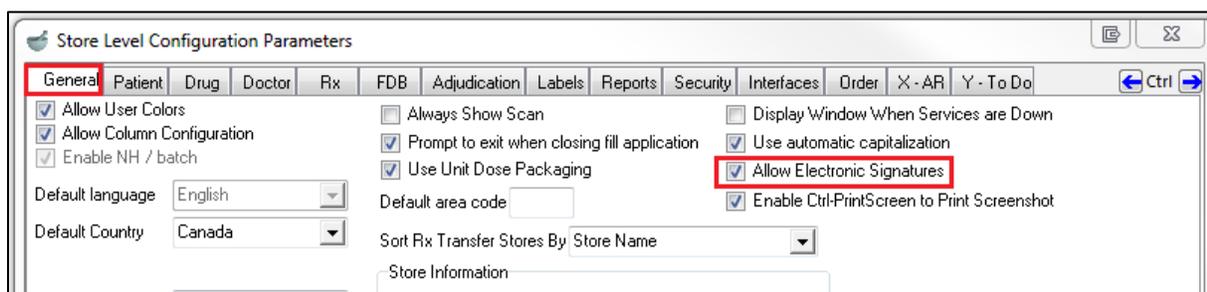
Configuring Electronic Signatures

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.



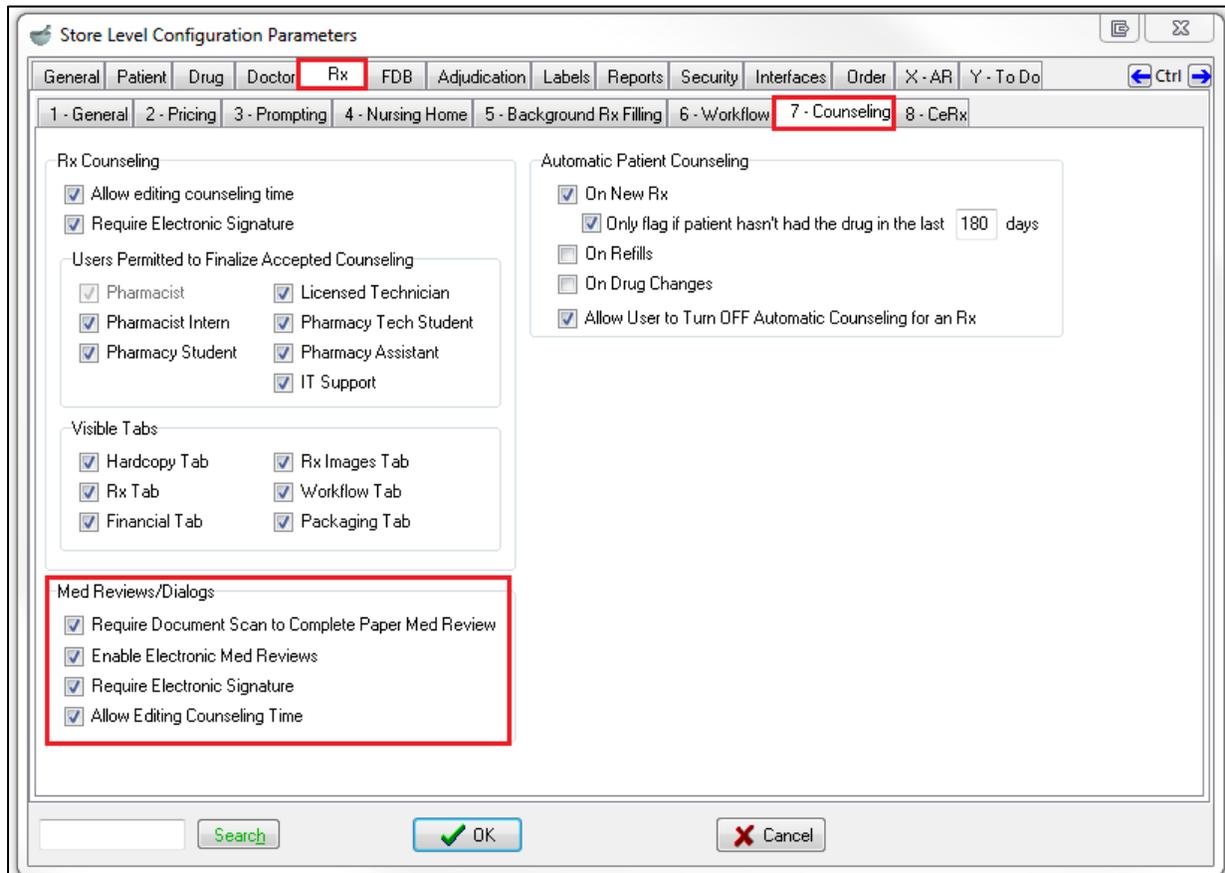
1. Go to **File > Configuration > Store > General**.
2. Place a checkmark next to **Allow Electronic Signatures**.



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.

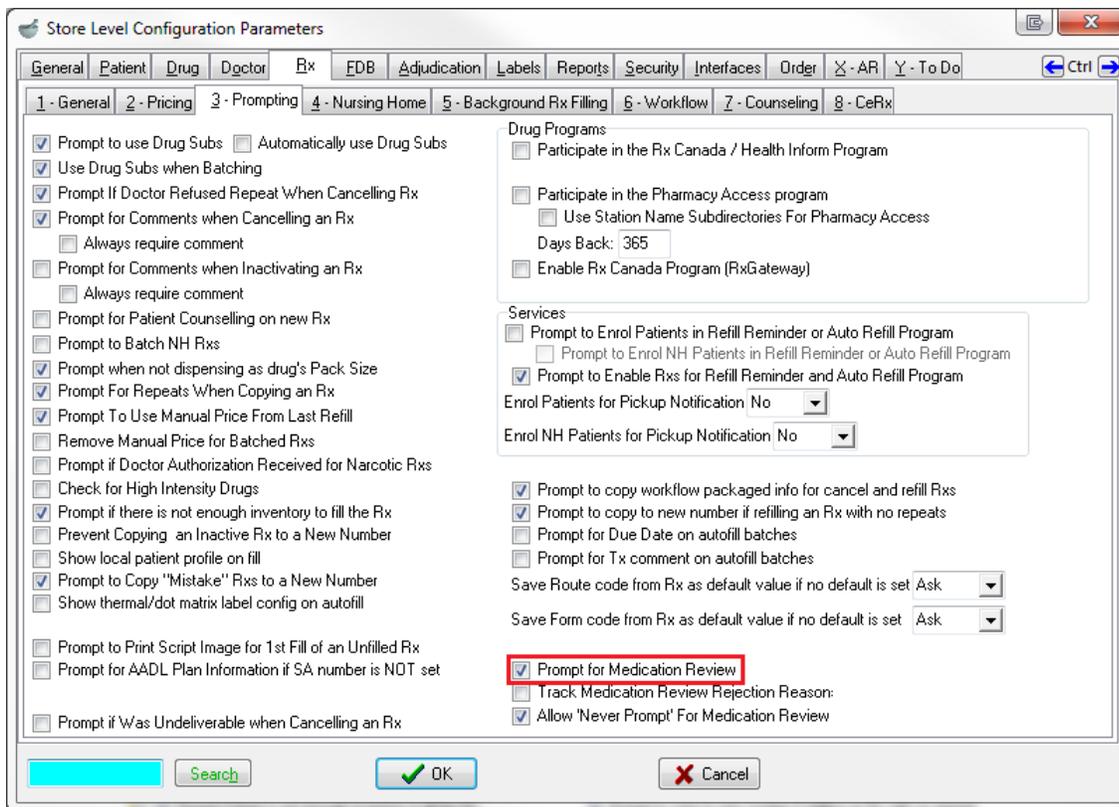
Electronic Medication Reviews

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.

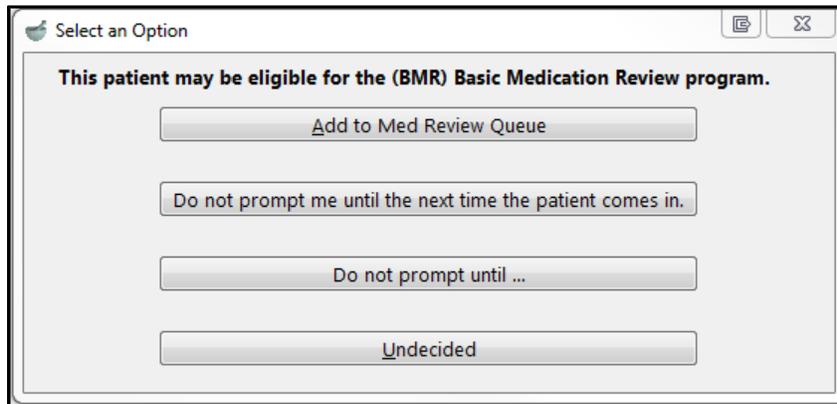
NOTE: The automatic prompts will not appear if the patient does not meet the criteria for a Medication Review. However, based on other available information and your professional judgement, you can determine whether the patient might benefit from a Medication Review and then manually create a Medication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



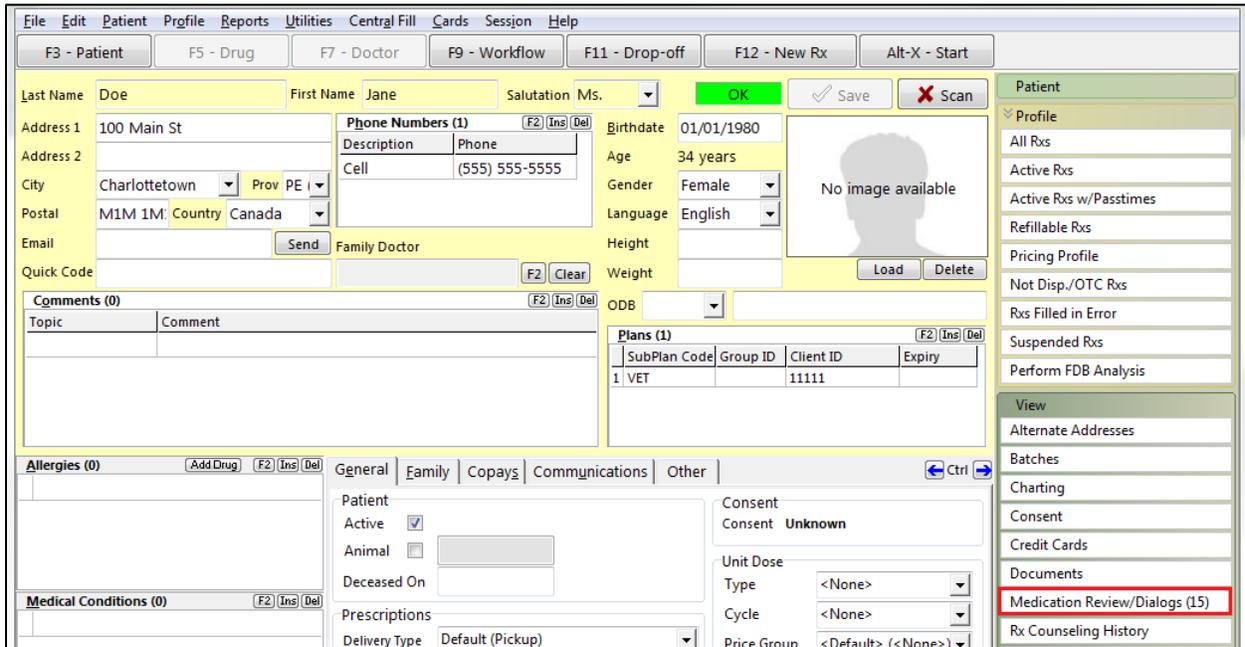
When the option '**Prompt for Medication Review**' is enabled, the system screens each patient for Medication Review eligibility every time an Rx is processed. If the patient is eligible, the user is prompted and presented with a number of options as shown below.



- **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.

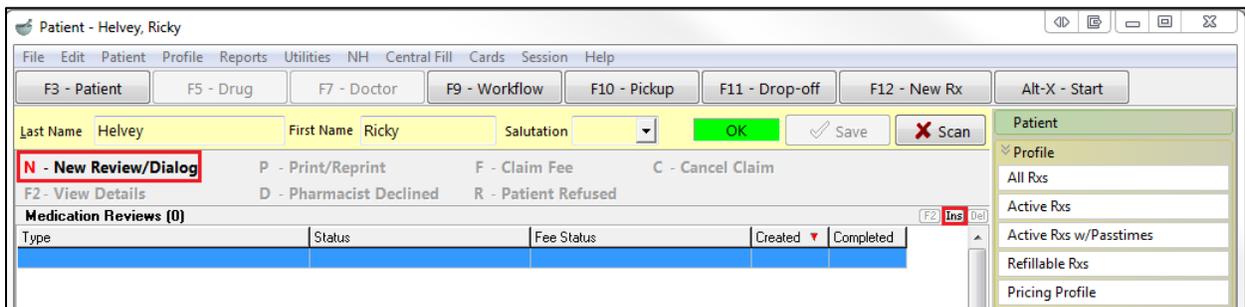
Creating an Electronic Medication Review (Manual)

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



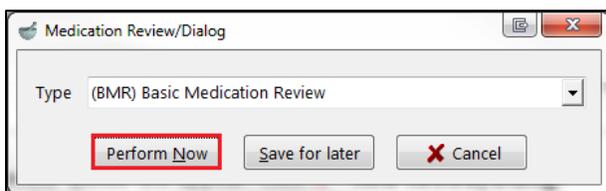
The screenshot shows the patient profile for Jane Doe. The right-hand navigation pane is open, and the 'Medication Review/Dialogs (15)' option is highlighted with a red box. Other options in the pane include Profile, All Rxs, Active Rxs, Active Rxs w/Passtimes, Refillable Rxs, Pricing Profile, Not Disp./OTC Rxs, Rxs Filled in Error, Suspended Rxs, Perform FDB Analysis, View, Alternate Addresses, Batches, Charting, Consent, Credit Cards, Documents, and Rx Counseling History.

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



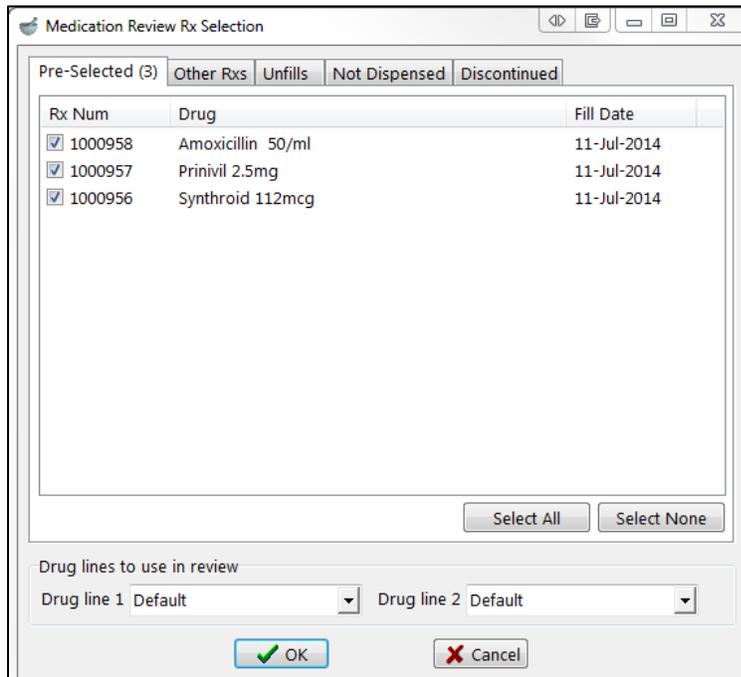
The screenshot shows the Medication Reviews window for Ricky Helvey. The 'N - New Review/Dialog' button is highlighted with a red box. Below the button, there are options for 'P - Print/Reprint', 'F - Claim Fee', 'C - Cancel Claim', 'D - Pharmacist Declined', and 'R - Patient Refused'. A table titled 'Medication Reviews (0)' is visible at the bottom, 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 '(BMR) Basic Medication Review'. The 'Perform 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**.

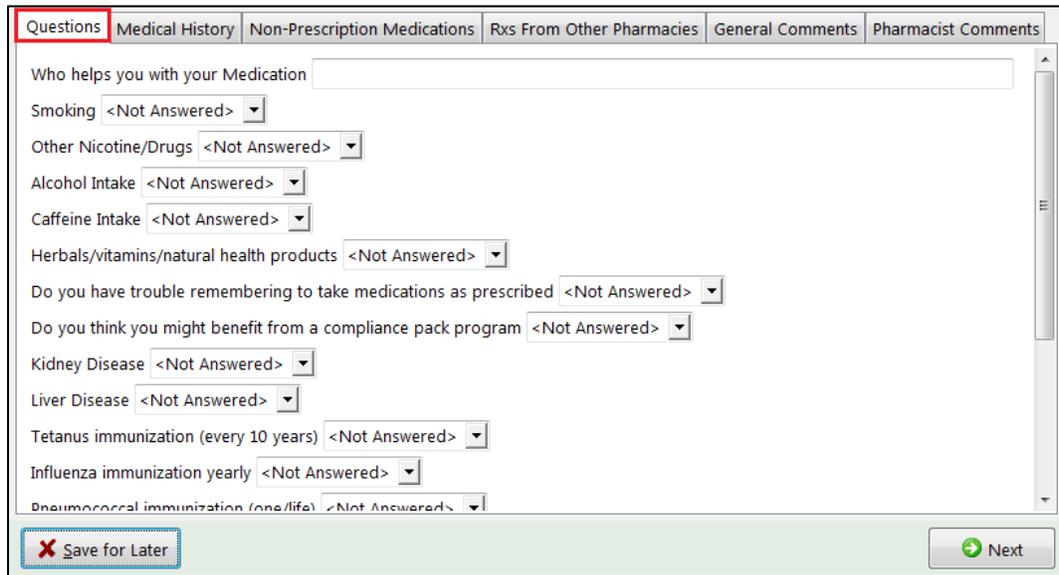


6. The **Medication Review Rx Selection** screen will appear. Click **Next** to proceed through the tabs, completing the required fields as you go.

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.



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

Who helps you with your Medication

Smoking <Not Answered>

Other Nicotine/Drugs <Not Answered>

Alcohol Intake <Not Answered>

Caffeine Intake <Not Answered>

Herbals/vitamins/natural health products <Not Answered>

Do you have trouble remembering to take medications as prescribed <Not Answered>

Do you think you might benefit from a compliance pack program <Not Answered>

Kidney Disease <Not Answered>

Liver Disease <Not Answered>

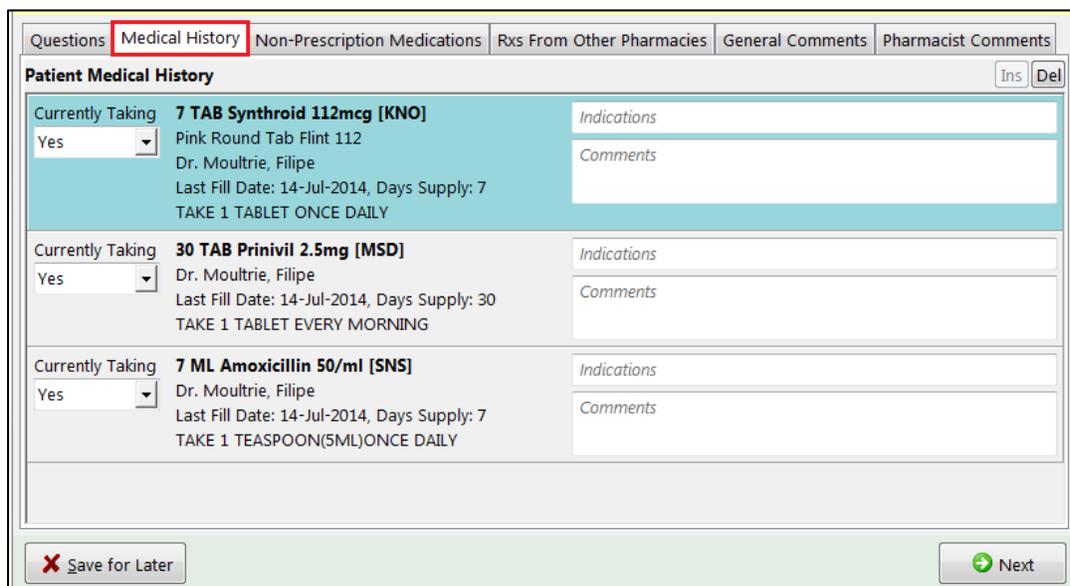
Tetanus immunization (every 10 years) <Not Answered>

Influenza immunization yearly <Not Answered>

Pneumococcal immunization (one/life) <Not Answered>

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

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

For each medication listed:

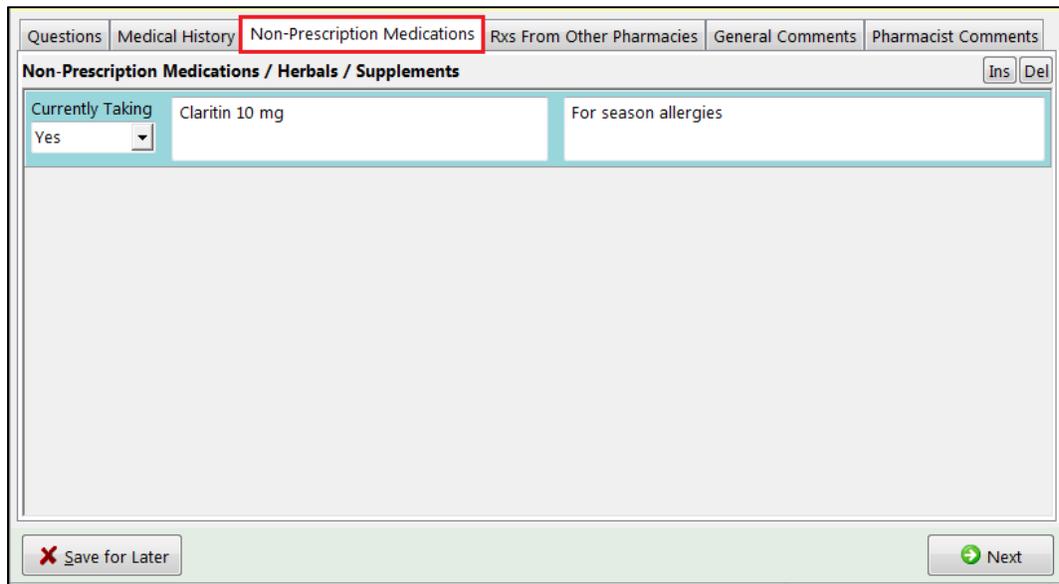
- Note if the patient is currently taking the specified medications and select **Yes/No** from the dropdown list.
- Enter the reason for using the medication based on the patient’s feedback in the **Indications** field.
- Enter any general comments in the **Comments** field.

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.

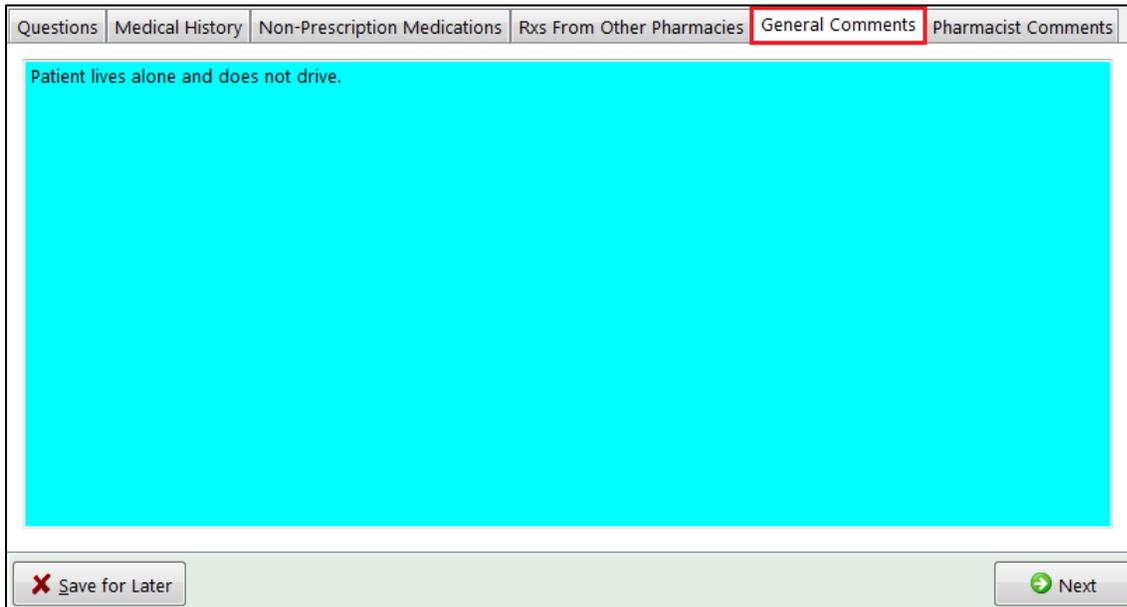
Questions	Medical History	Non-Prescription Medications	Rxs From Other Pharmacies	General Comments	Pharmacist Comments
Prescriptions From Other Pharmacies Ins Del					
Currently Taking Yes <input type="button" value="v"/>	Tylenol # 3 - Take 1 to 2 tablets up to 4 times a day when needed for pain	From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

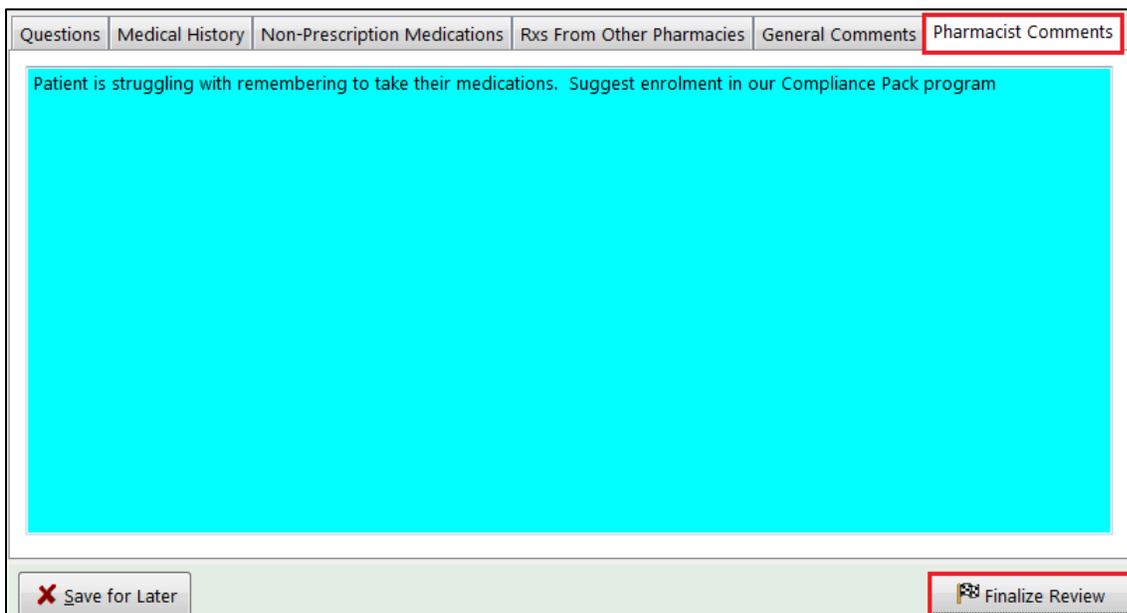
The **General Comments** tab provides space to record any comments you want included on the report printout.



The screenshot shows a web interface with a horizontal tab bar at the top containing: Questions, Medical History, Non-Prescription Medications, Rxs From Other Pharmacies, **General Comments** (highlighted with a red box), and Pharmacist Comments. Below the tabs is a large cyan text area containing the text: "Patient lives alone and does not drive." At the bottom of the form, there is a "Save for Later" button with a red 'X' icon on the left and a "Next" button with a green arrow icon on the right.

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.



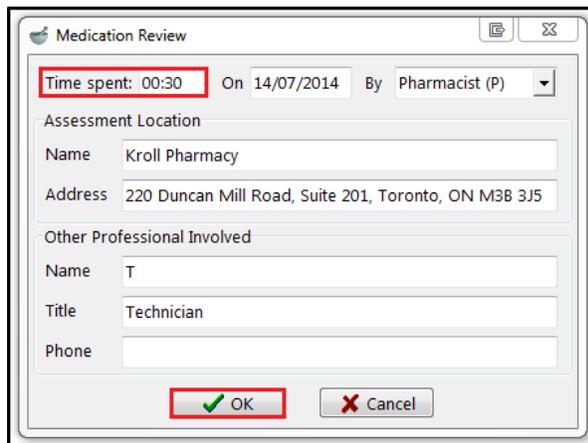
The screenshot shows a web interface with a horizontal tab bar at the top containing: Questions, Medical History, Non-Prescription Medications, Rxs From Other Pharmacies, General Comments, and **Pharmacist Comments** (highlighted with a red box). Below the tabs is a large cyan text area containing the text: "Patient is struggling with remembering to take their medications. Suggest enrolment in our Compliance Pack program". At the bottom of the form, there is a "Save for Later" button with a red 'X' icon on the left and a "Finalize Review" button with a document icon on the right (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**.



The screenshot shows a 'Medication Review' dialog box with the following fields and values:

- Time spent:** 00:30 (highlighted with a red box)
- On:** 14/07/2014
- By:** Pharmacist (P) (dropdown menu)
- Assessment Location:**
 - Name:** Kroll Pharmacy
 - Address:** 220 Duncan Mill Road, Suite 201, Toronto, ON M3B 3J5
- Other Professional Involved:**
 - Name:** T
 - Title:** Technician
 - Phone:** (empty field)
- Buttons:** OK (with a green checkmark icon and highlighted with a red box) and Cancel (with a red X icon)

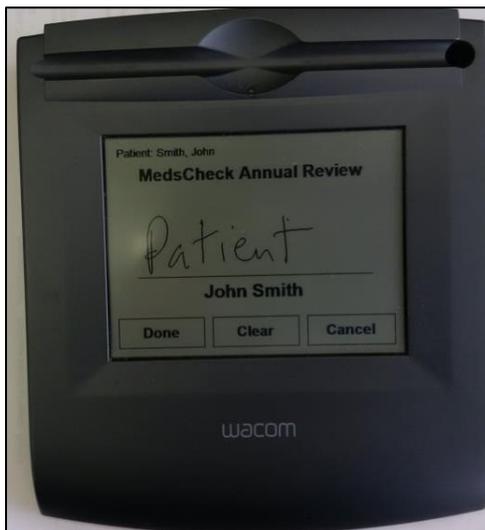
Affixing an Electronic Signature

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.

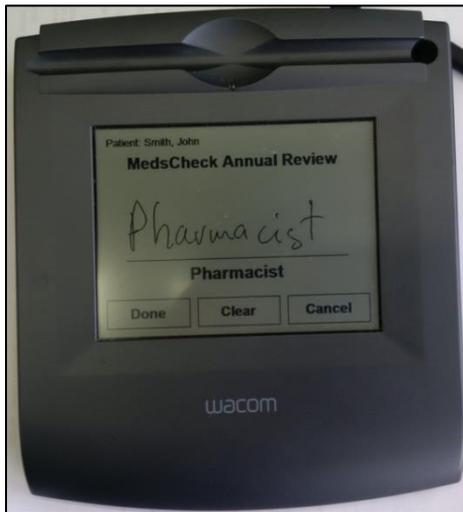
9. Have the patient sign his or her name on the electronic signature tablet. Click the **OK** button on the signature tablet.



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**.

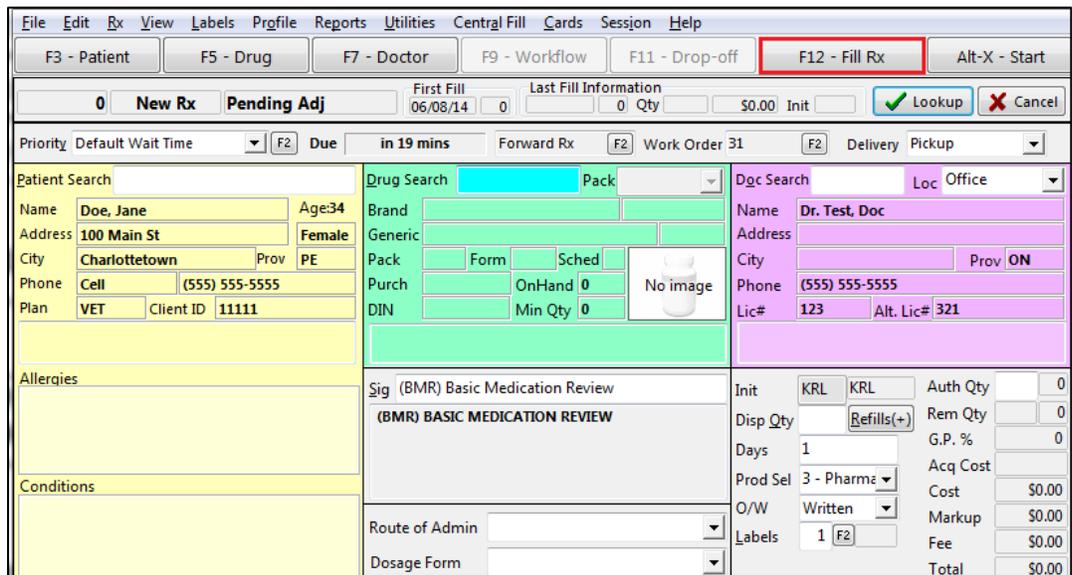
13. The **Medication Review report** print form will appear. Select the appropriate print options and click **Print** and provide this copy to the patient.

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.

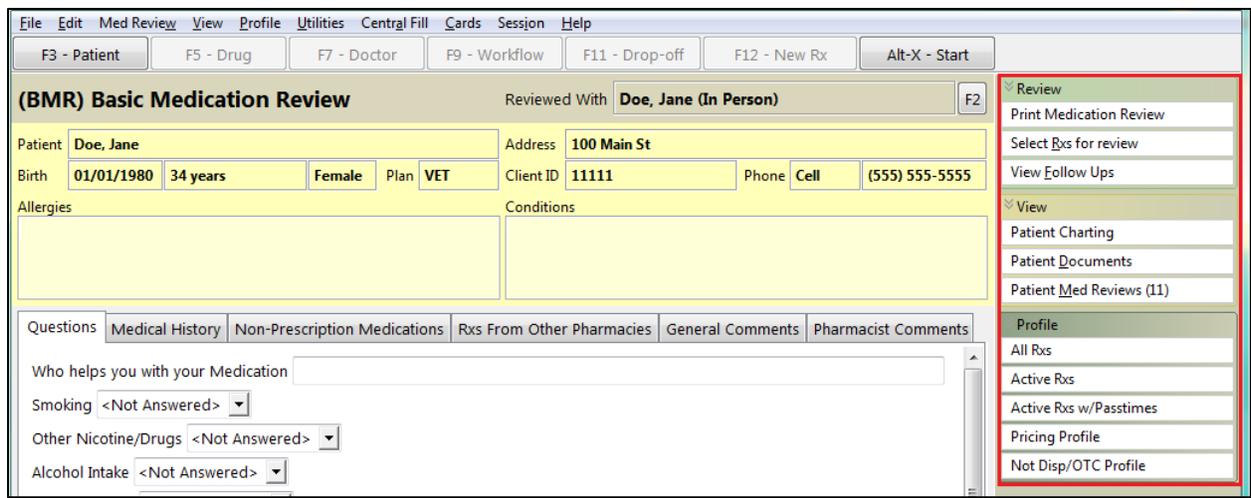
15. Click **F12 - Fill Rx**. The claim will be transmitted to the appropriate party for payment.



The screenshot shows a software interface with a menu bar (File, Edit, Rx, View, Labels, Profile, Reports, Utilities, Central Fill, Cards, Session, Help) and a toolbar with buttons for F3 - Patient, F5 - Drug, F7 - Doctor, F9 - Workflow, F11 - Drop-off, **F12 - Fill Rx** (highlighted in red), and Alt-X - Start. Below the toolbar, there are fields for 'New Rx' (0), 'Pending Adj', 'First Fill' (06/08/14), 'Last Fill Information' (0 Qty), '\$0.00 Init', 'Lookup', and 'Cancel' buttons. A status bar shows 'Priority Default Wait Time', 'Due in 19 mins', 'Forward Rx', 'Work Order 31', 'Delivery Pickup'. The main area is divided into three search panes: Patient Search (Name: Doe, Jane, Age: 34, Address: 100 Main St, City: Charlottetown, PE, Phone: (555) 555-5555, Plan: VET, Client ID: 11111), Drug Search (Brand, Generic, Pack, Form, Sched, Purch, OnHand: 0, No image, DJN, Min Qty: 0), and Dgc Search (Name: Dr. Test, Doc, Address, City, Prov: ON, Phone: (555) 555-5555, Lic#: 123, Alt. Lic#: 321). Below these are sections for Allergies, Conditions, Sig (BMR) Basic Medication Review, Route of Admin, Dosage Form, and a table for medication details (Init, Disp Qty, Days, Prod Sel, O/W, Labels, Auth Qty, Rem Qty, G.P. %, Acq Cost, Cost, Markup, Fee, Total).

Medication Review Options

Several Medication Review options are available from the right navigation pane on the **(BMR) Basic Medication Review** screen.

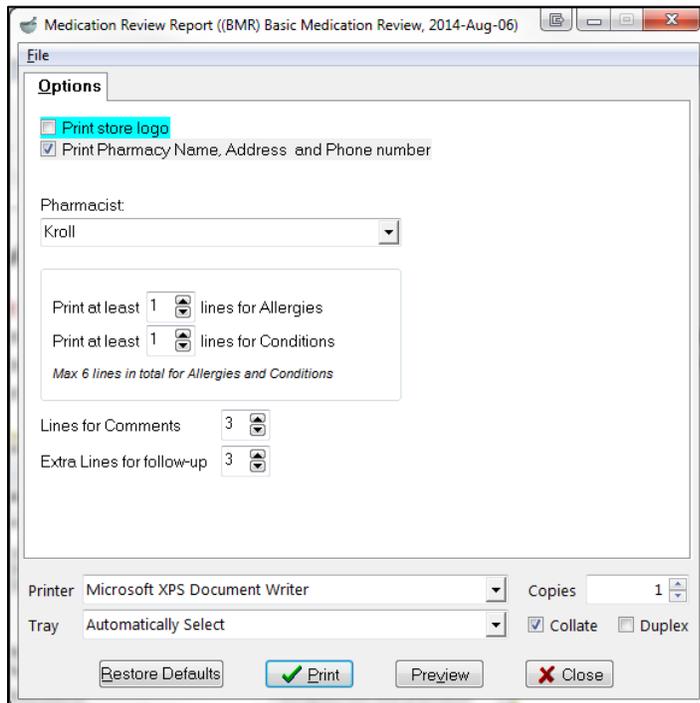


The screenshot shows the '(BMR) Basic Medication Review' screen for patient 'Doe, Jane (In Person)'. The interface includes a menu bar (File, Edit, Med Review, View, Profile, Utilities, Central Fill, Cards, Session, Help) and a toolbar with buttons for F3 - Patient, F5 - Drug, F7 - Doctor, F9 - Workflow, F11 - Drop-off, F12 - New Rx, and Alt-X - Start. The main area is divided into Patient Search (Name: Doe, Jane, Birth: 01/01/1980, 34 years, Female, Plan: VET, Address: 100 Main St, Client ID: 11111, Phone: Cell (555) 555-5555), Allergies, Conditions, and a section for 'Who helps you with your Medication', 'Smoking', 'Other Nicotine/Drugs', and 'Alcohol Intake'. The right navigation pane is highlighted in red and contains the following options: Review, Print Medication Review, Select Rxs for review, View Follow Ups, View, Patient Charting, Patient Documents, Patient Med Reviews (11), Profile, All Rxs, Active Rxs, Active Rxs w/Passtimes, Pricing Profile, and Not Disp/OTC Profile.

Review

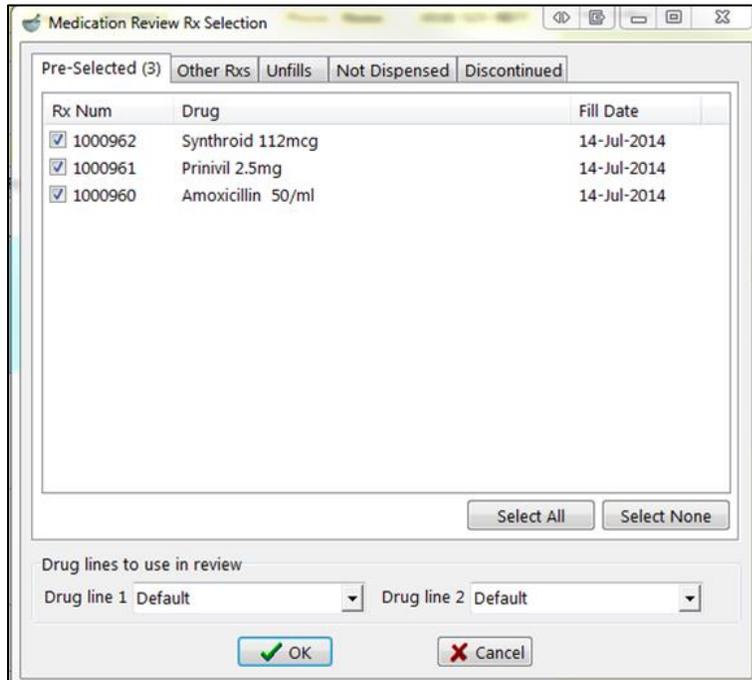
Print Medication Review

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



Select Rx's for review

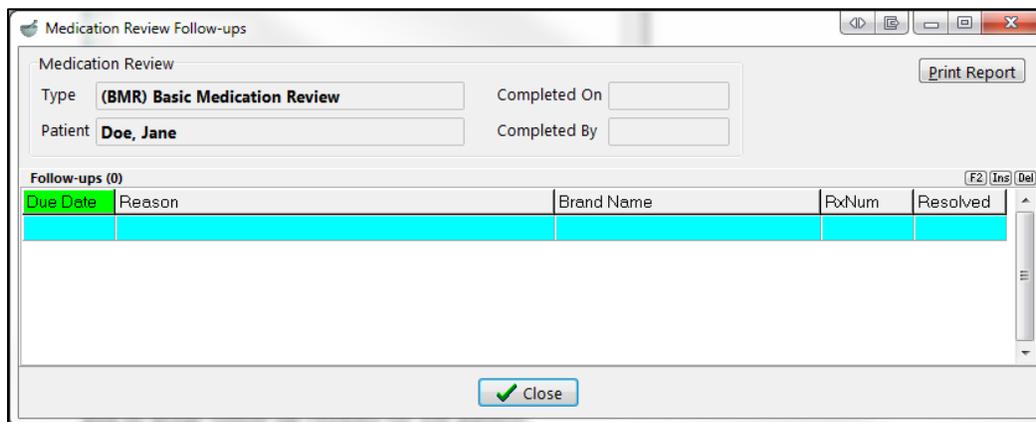
If you wish to add/edit Rx's on the Medical History tab, click the button Select Rx's for review. When selected, the **Medication Review Rx Selection** screen will appear, allowing you to add and remove items from the **Medical History** tab on the **Medication Review Annual Review** screen. Click **OK**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



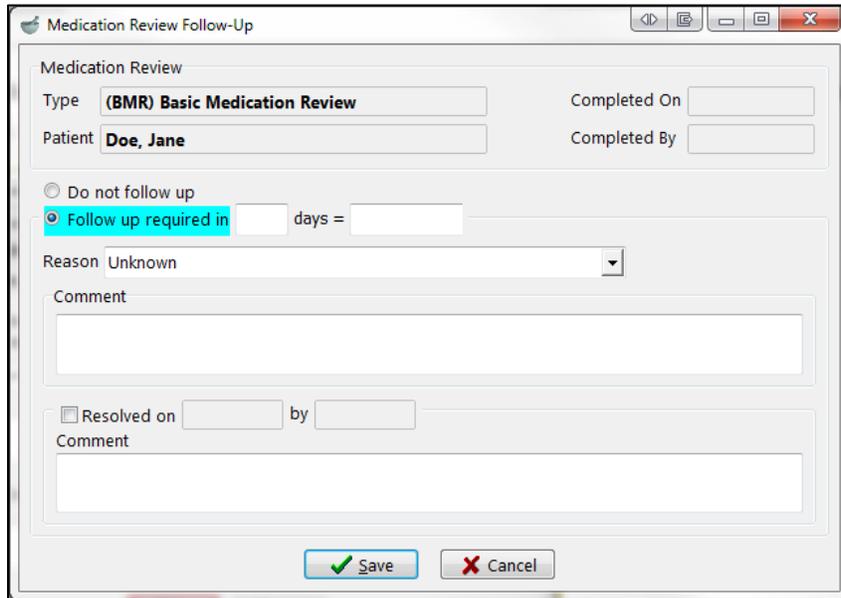
View Follow Ups

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**.



Medication Review

Type **(BMR) Basic Medication Review** Completed On

Patient **Doe, Jane** Completed By

Do not follow up

Follow up required in days =

Reason Unknown

Comment

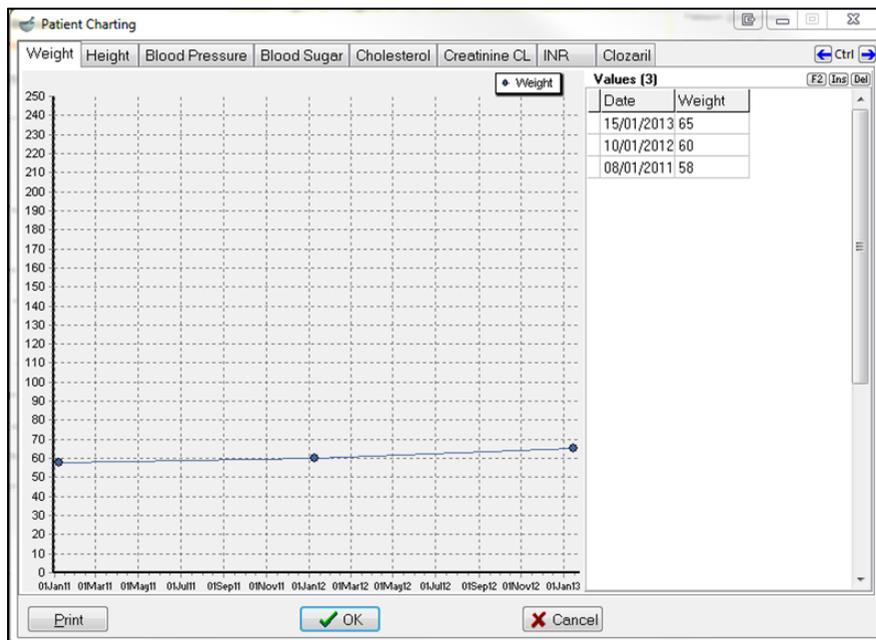
Resolved on by

Comment

View

Patient Charting

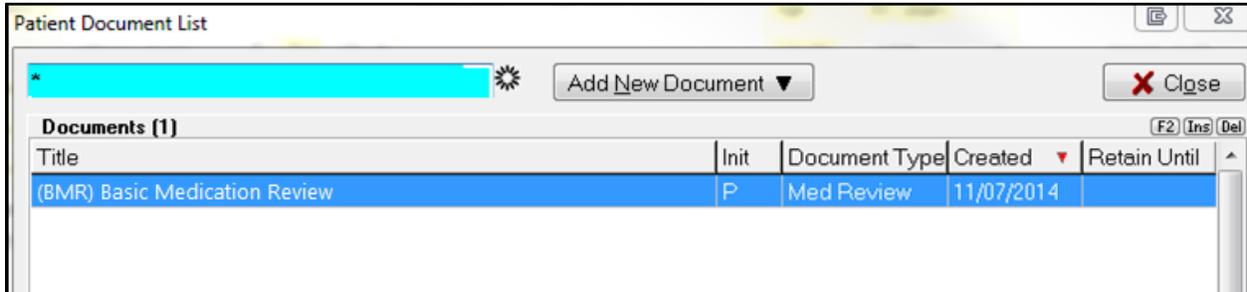
When this option is selected, the **Patient Charting** form will appear, displaying information about the patient’s weight, height, blood pressure, blood sugar, and so on.



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

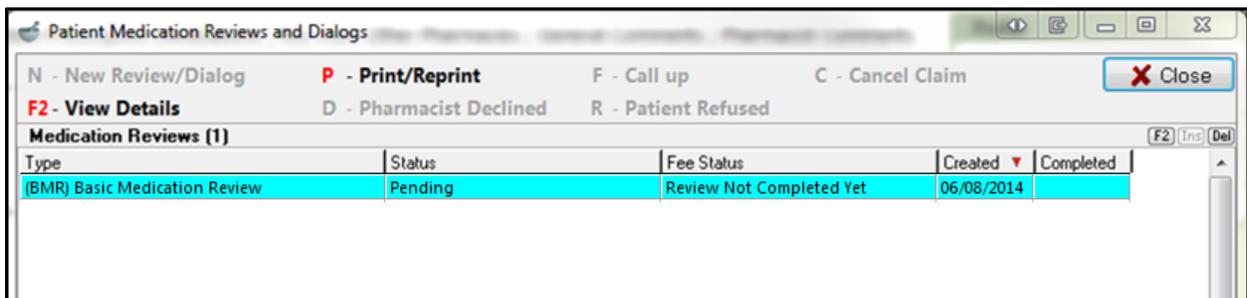
When this option is selected, the **Patient Document List** will appear displaying a list of documents associated with the patient.



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

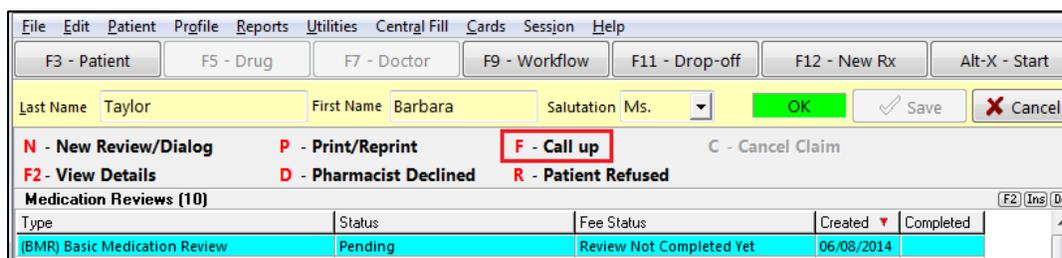
The **Profile** menu on the **Medication Review Annual Review** screen is identical to the **Profile** menu on the patient profile. This menu allows you to view **All Rxs, Active Rxs, Active Rxs w/ Passtimes, Pricing Profile, and Not Disp/OTC Profile**.

Completing Medication Review ‘Saved for Later’

- 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 appears with all the Med Review records that are pending review.

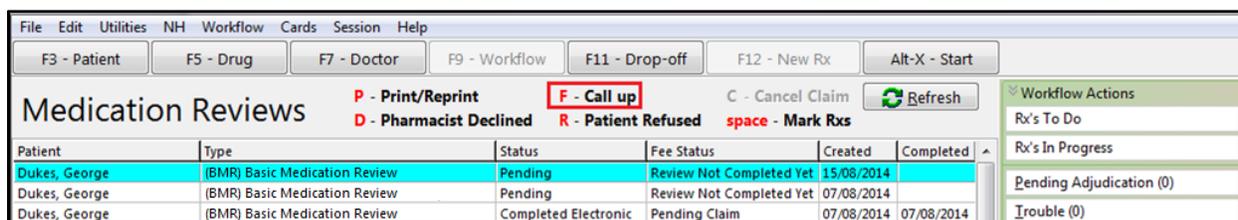


Type	Status	Fee Status	Created	Completed
(BMR) Basic Medication Review	Pending	Review Not Completed Yet	06/08/2014	

- 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**.



Patient	Type	Status	Fee Status	Created	Completed
Dukes, George	(BMR) Basic Medication Review	Pending	Review Not Completed Yet	15/08/2014	
Dukes, George	(BMR) Basic Medication Review	Pending	Review Not Completed Yet	07/08/2014	
Dukes, George	(BMR) Basic Medication Review	Completed Electronic	Pending Claim	07/08/2014	07/08/2014

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

Sample Electronic Medication Review Report

(BMR) Basic Medication Review



<i>Name</i> Doe, Jane		<i>Gender</i> Female	<i>Date of Birth</i> 01-Jan-1980
<i>Address</i> 100 Main St, Charlottetown PE M1M 1M1		<i>Phone</i>	<i>PHN</i>
<i>Family Doctor</i>		<i>Family Doctor Phone</i>	<i>Family Doctor Fax</i>
<i>Allergies</i>			
<i>Conditions</i>			
<i>Smoking</i> <input type="checkbox"/> No <input type="checkbox"/> Yes, # cigarettes/day:	<i>Alcohol Intake</i> <input type="checkbox"/> No <input type="checkbox"/> Yes, # drinks/week:	<i>Caffeine Intake</i> <input type="checkbox"/> No <input type="checkbox"/> Yes, # cups/day:	<i>Other/Nicotine/Drugs</i> <input type="checkbox"/> No <input type="checkbox"/> Yes:

Health Information

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
<i>Other immunizations/travel vaccines</i>					
<i>What is your biggest concern about your medications today</i>					

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

The Prince Edward Island Pharmacists Association in collaboration with the Canadian Pharmacists Association have adapted the CPhA PharmaCheck™ program to meet the needs of Prince Edward Islanders. PharmaCheck™ is a trademark of the Canadian Pharmacists Association and is used under license.




Page 1 of 2

(BMR) Basic Medication Review

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.

Leilani Colson
Patient Signature

14-Jul-2014
Date

Pharmacist
Kroll

The Prince Edward Island Pharmacists Association in collaboration with the Canadian Pharmacists Association have adapted the CPHA PharmaCheck™ program to meet the needs of Prince Edward Islanders. PharmaCheck™ is a trademark of the Canadian Pharmacists Association and is used under license.

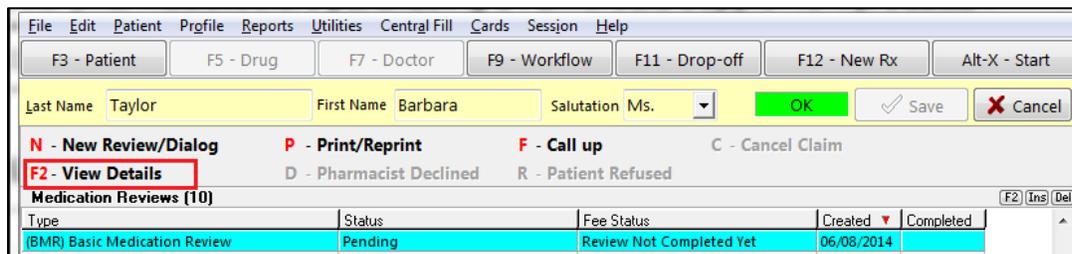
Page 2 of 2



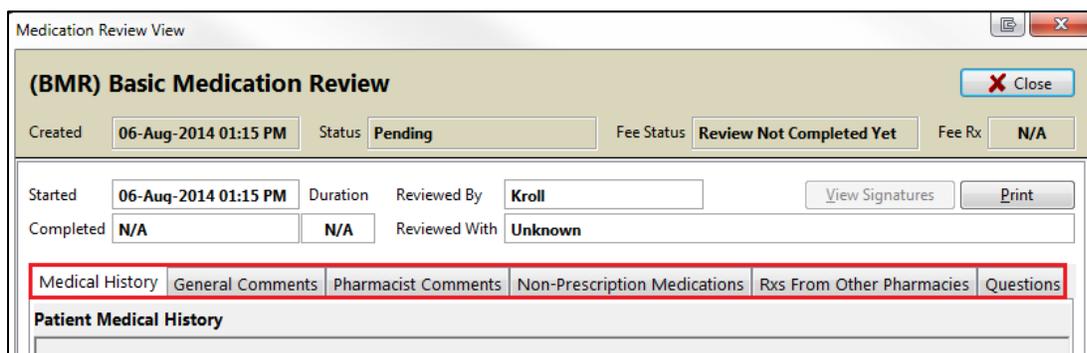
Viewing a Completed Medication Review

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**.



- The **Medication Review View** screen will appear. Click the various tabs to see the Medication Review information that has been entered.



Medication Review View

(BMR) Basic Medication Review Close

Created: 06-Aug-2014 01:15 PM Status: Pending Fee Status: Review Not Completed Yet Fee Rx: N/A

Started: 06-Aug-2014 01:15 PM Duration: Reviewed By: Kroll View Signatures Print

Completed: N/A Reviewed With: Unknown

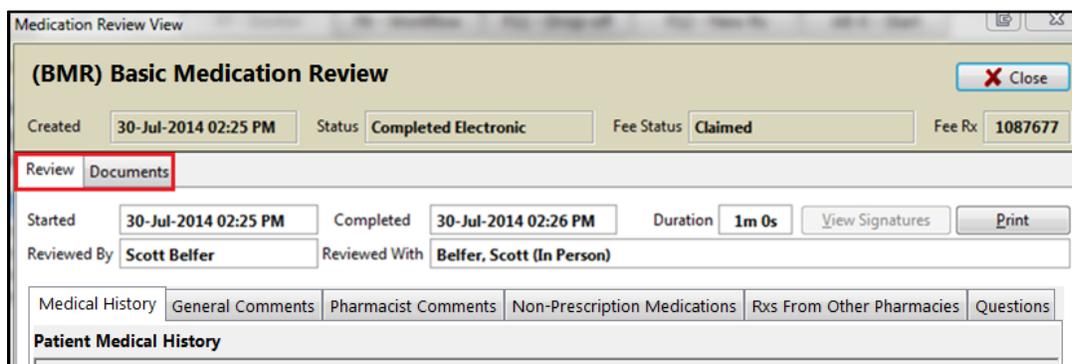
Medical History | General Comments | Pharmacist Comments | Non-Prescription Medications | Rxs From Other Pharmacies | Questions

Patient Medical History

- 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

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



Medication Review View

(BMR) Basic Medication Review Close

Created: 30-Jul-2014 02:25 PM Status: Completed Electronic Fee Status: Claimed Fee Rx: 1087677

Review | Documents

Started: 30-Jul-2014 02:25 PM Completed: 30-Jul-2014 02:26 PM Duration: 1m 0s View Signatures Print

Reviewed By: Scott Belfer Reviewed With: Belfer, Scott (In Person)

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

Patient Medical History

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

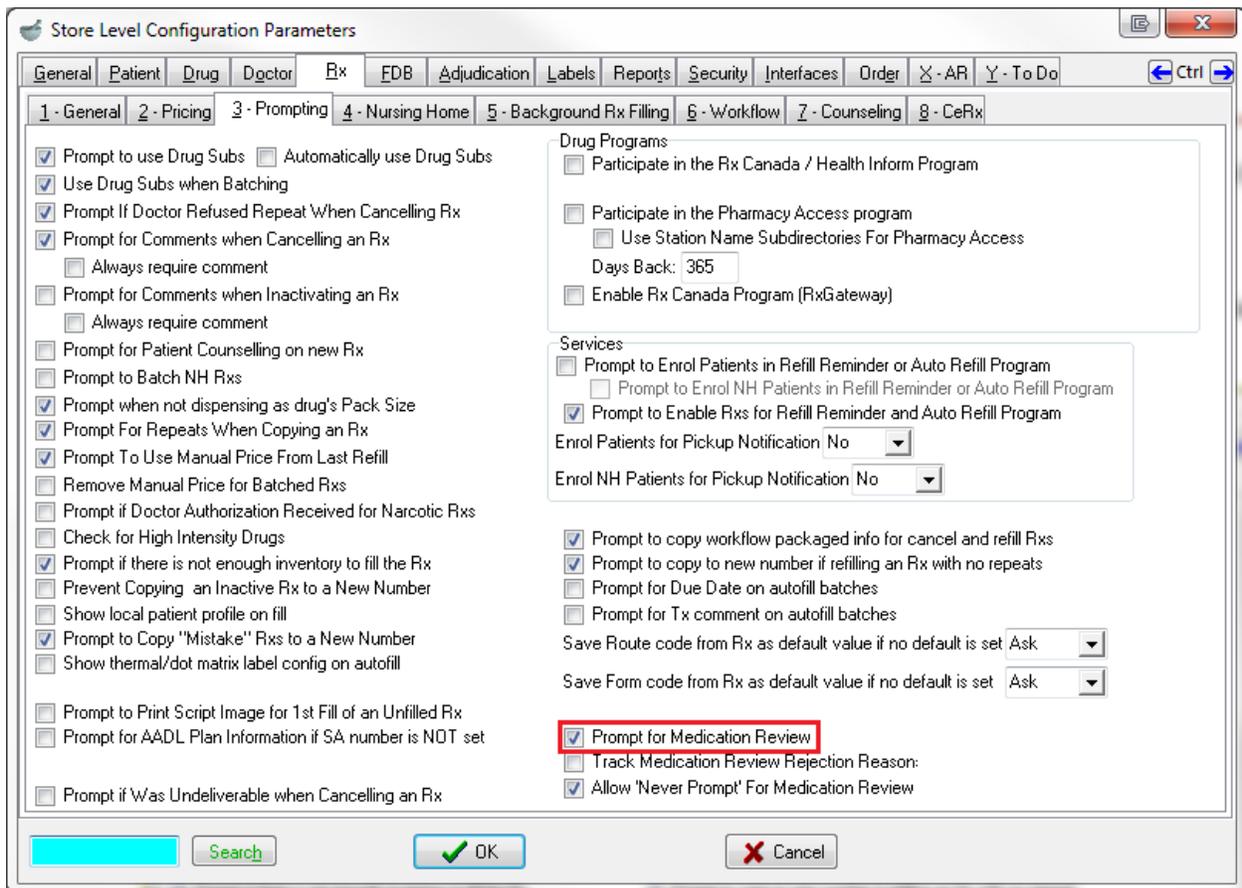
Paper Medication Reviews

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

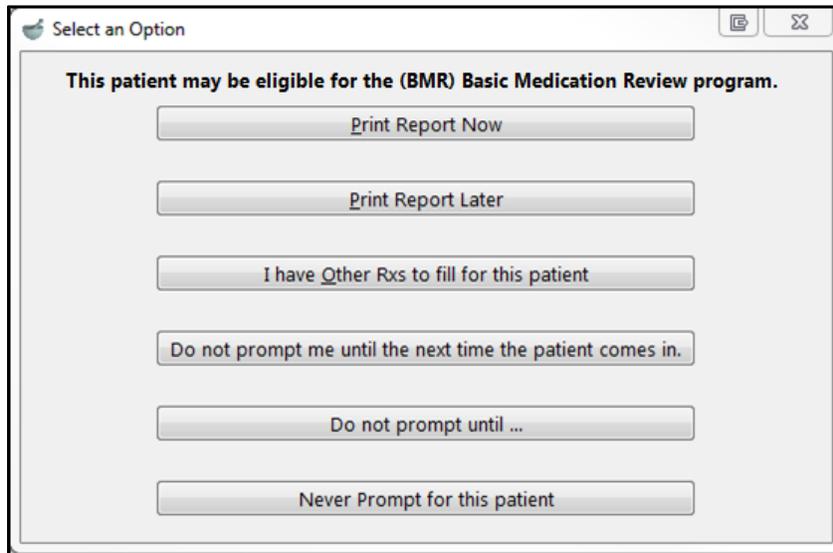
NOTE: The automatic prompts will not appear if the patient does not meet the criteria for a Medication Review. However, based on other available information and your professional judgement, you can determine whether the patient might benefit from a Medication Review and then manually create a Medication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



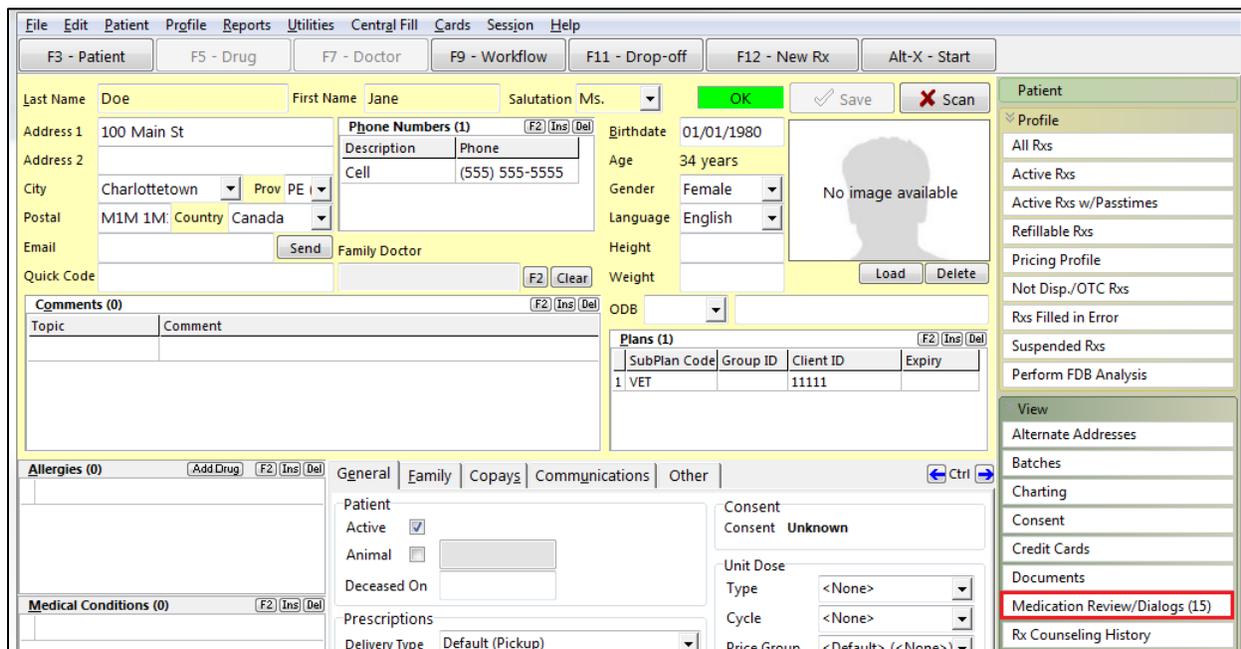
When the option '**Prompt for Medication Reviews**' is enabled, the system screens each patient for Medication Review eligibility every time an Rx is processed. If the patient is eligible, the user is prompted and presented with a number of options as shown below.



- **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 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.

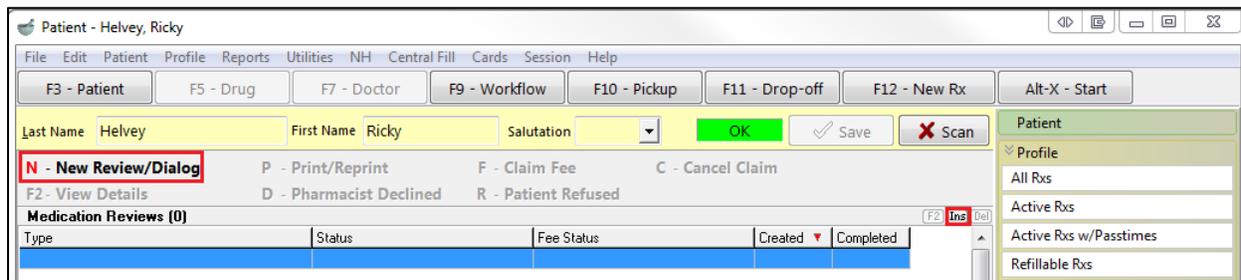
Creating a Paper Medication Review (Manual)

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



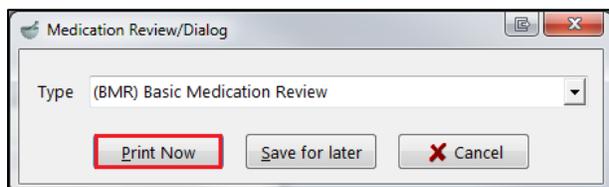
The screenshot shows the patient profile for Jane Doe. The right-hand navigation pane is open, and 'Medication Review/Dialogs (15)' is highlighted in red. The patient information includes: Last Name: Doe, First Name: Jane, Birthdate: 01/01/1980, Age: 34 years, Gender: Female, Language: English. The 'Medication Review/Dialogs' section is currently empty.

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



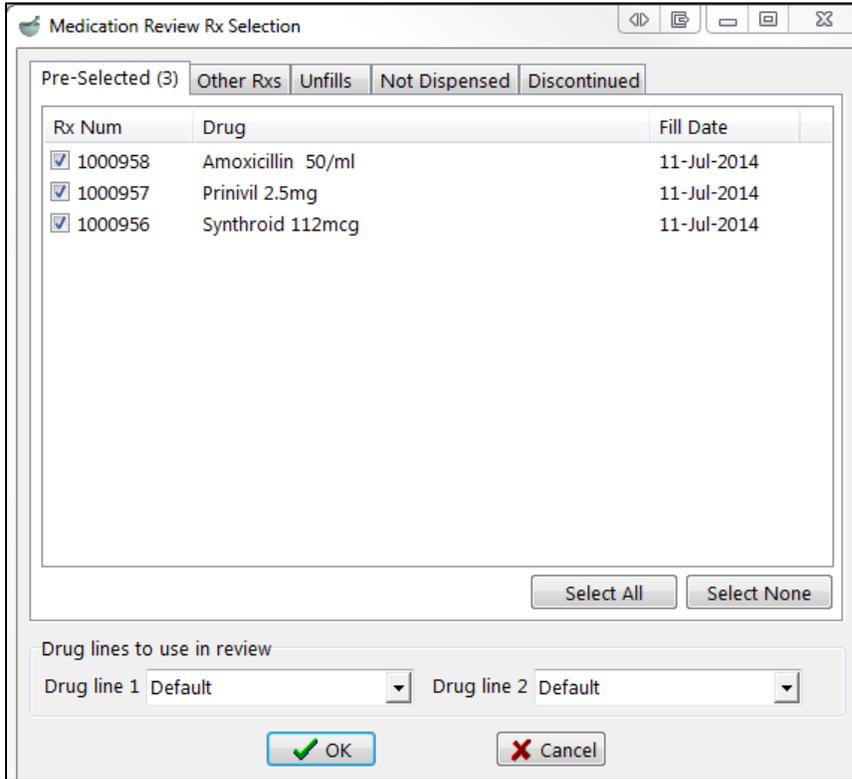
The screenshot shows the patient profile for Ricky Helvey. The 'Medication Reviews (0)' section is visible, and the 'N - New Review/Dialog' button is highlighted in red. The 'Medication Reviews' table is currently empty.

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 is set to '(BMR) Basic Medication Review'. The 'Print Now' button is highlighted in red.

- 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**.



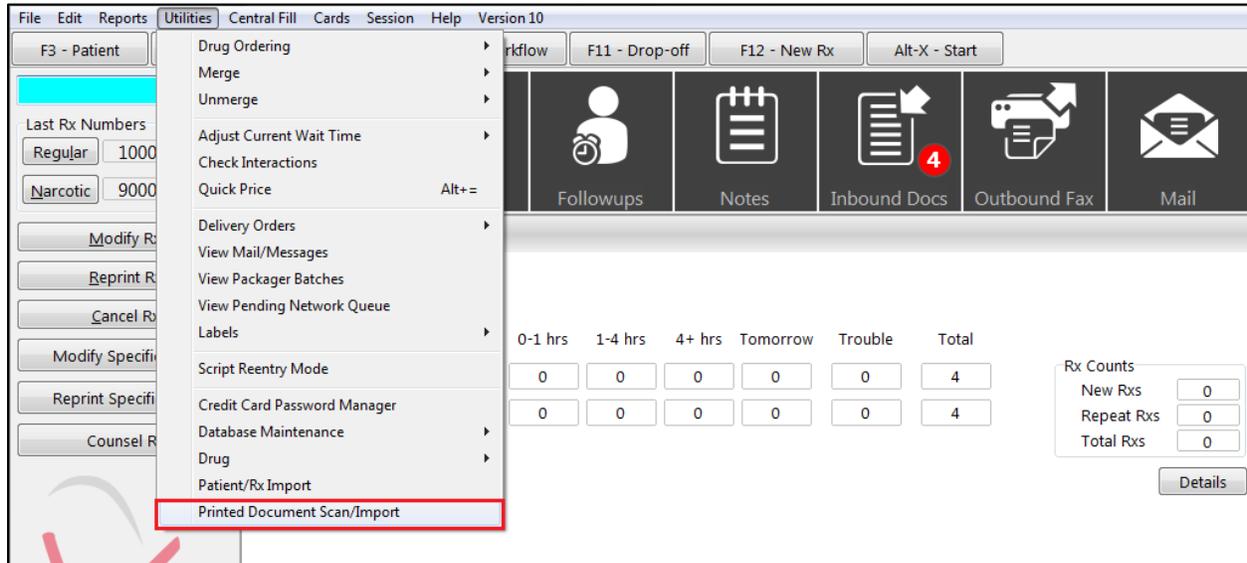
The screenshot shows a software window titled "Medication Review Rx Selection". It features a tabbed interface with the following tabs: "Pre-Selected (3)", "Other Rxs", "Unfills", "Not Dispensed", and "Discontinued". The "Pre-Selected (3)" tab is active, displaying a table with three rows of medication data. Each row has a checked checkbox in the first column. Below the table are "Select All" and "Select None" buttons. At the bottom, there are two dropdown menus labeled "Drug line 1" and "Drug line 2", both set to "Default". The window concludes with "OK" and "Cancel" buttons.

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

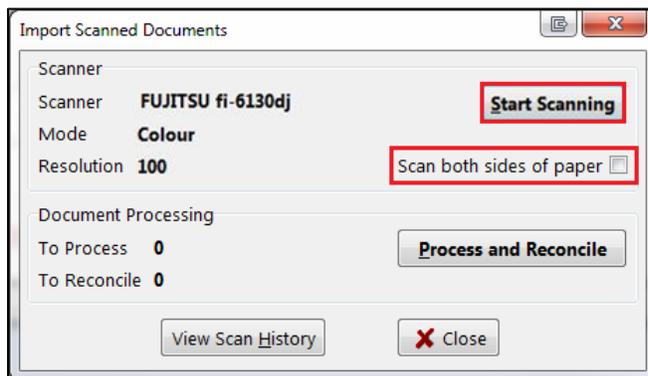
- The **Medication Review Report** form will appear. Select the appropriate print options and click **Print**. The report will generate.
- Complete the Medication Review on the form. Sign the **Medication Review Report** and have the patient do the same.

Scanning Medication Review Reports

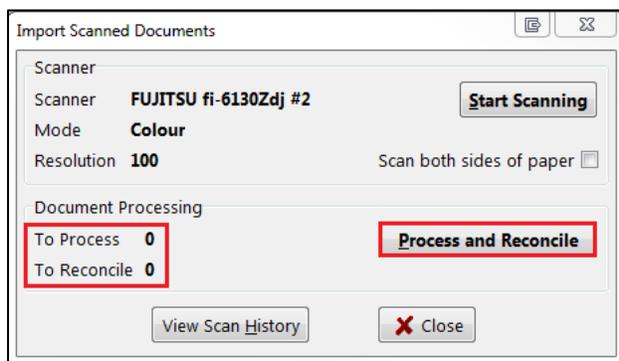
8. From the **Alt-X Start** screen, go to **Utilities > Printed Document Scan/Import**.



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**.



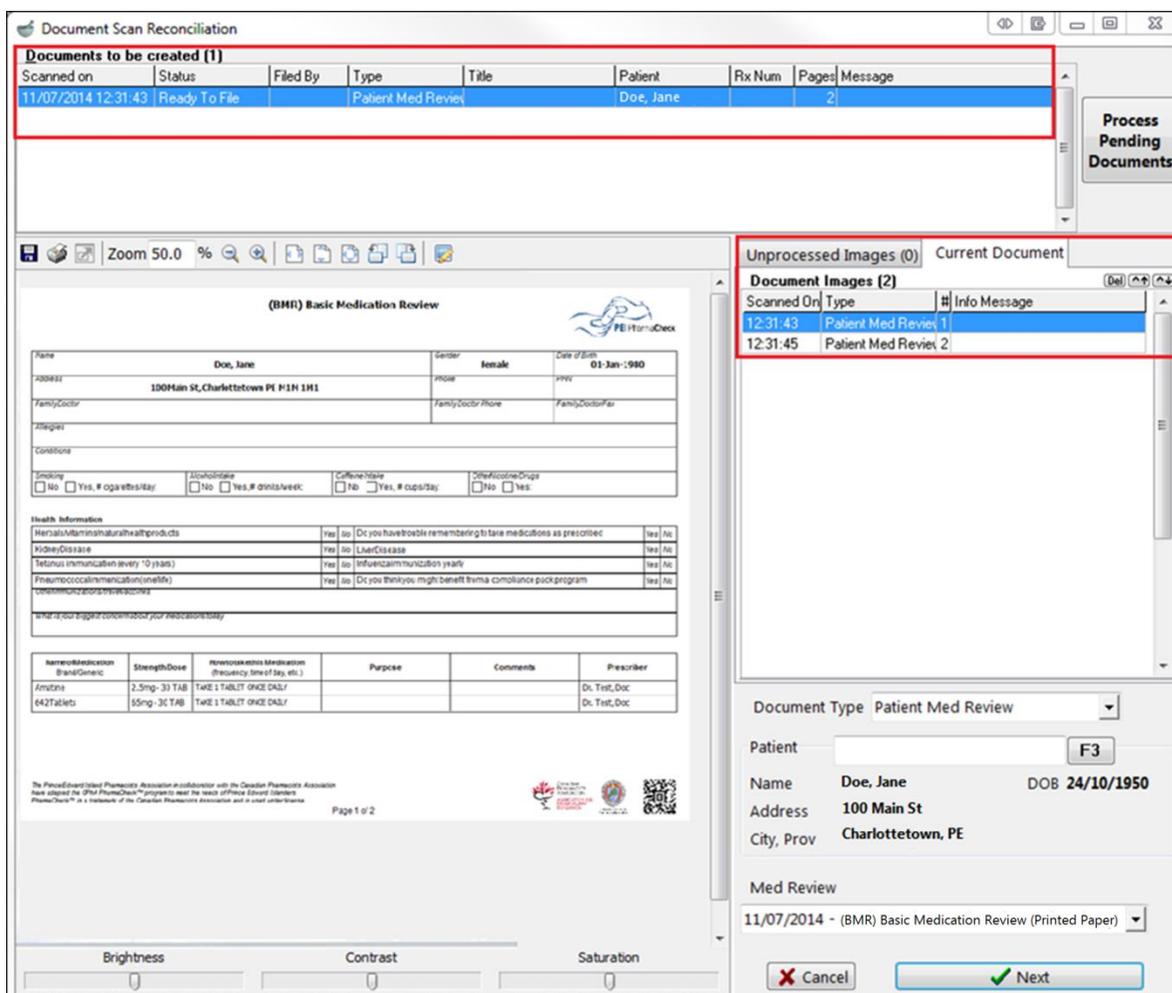
Import Scanned Documents

Scanner
 Scanner **FUJITSU fi-6130Zdj #2** **Start Scanning**
 Mode **Colour**
 Resolution **100** Scan both sides of paper

Document Processing
 To Process **0** **Process and Reconcile**
 To Reconcile **0**

View Scan History **X** Close

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



Document Scan Reconciliation

Documents to be created (1)

Scanned On	Status	Filed By	Type	Title	Patient	Rx Num	Pages	Message
11/07/2014 12:31:43	Ready To File		Patient Med Review		Doe, Jane		2	

Unprocessed Images (0) Current Document

Document Images (2)

Scanned On	Type	#	Info Message
12:31:43	Patient Med Review 1		
12:31:45	Patient Med Review 2		

(BMR) Basic Medication Review

Name: Doe, Jane | Gender: Female | Date of Birth: 01-Jan-1980
 Address: 100 Main St, Charlottetown PE P1H 1H1
 Family Doctor: Family Doctor Home | Family Doctor Fax: Family Doctor Fax

Smoking: No Yes, # cigarettes/day: No Yes, # drinks/week: No Yes, # cups/day: No Yes

Health Information:
 Herxal/Minim/natural health products: Yes No | Do you have trouble remembering to take medications as prescribed: Yes No
 Kidney/Disease: Yes No | Last/Closest: Yes No
 Tetanus immunization (every 10 years): Yes No | Influenza immunization (yearly): Yes No
 Pneumococcal immunization (one-time): Yes No | Do you think you might benefit from a compliance pack program: Yes No

Brand/Generics	Strength/Dose	How/when to take medication (frequency, time of day, etc.)	Purpose	Comments	Prescriber
Zyrtec	2.5mg - 30 TAB	TAKE 1 TABLET ONCE DAILY			Dr. Test, Doc
642 Tablets	55mg - 30 TAB	TAKE 1 TABLET ONCE DAILY			Dr. Test, Doc

Document Type: Patient Med Review
 Patient: F3
 Name: Doe, Jane | DOB: 24/10/1950
 Address: 100 Main St | City, Prov: Charlottetown, PE
 Med Review: 11/07/2014 - (BMR) Basic Medication Review (Printed Paper)

X Cancel **Next**

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

Billing a Medication Review

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

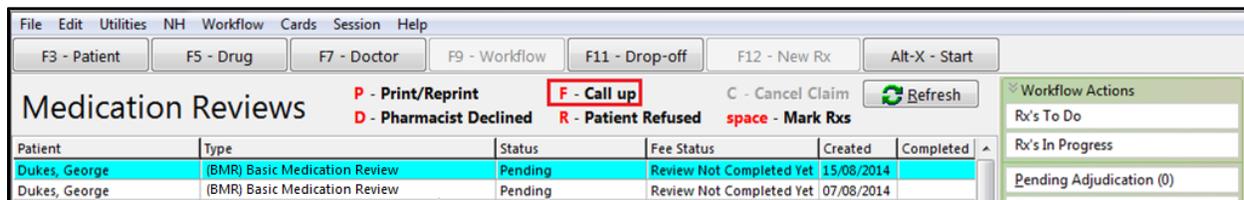
14. Click **F12 - Fill Rx**. The claim will be transmitted to the appropriate party for payment.

Completing Medication Review ‘Saved for Later’

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

Patient Card

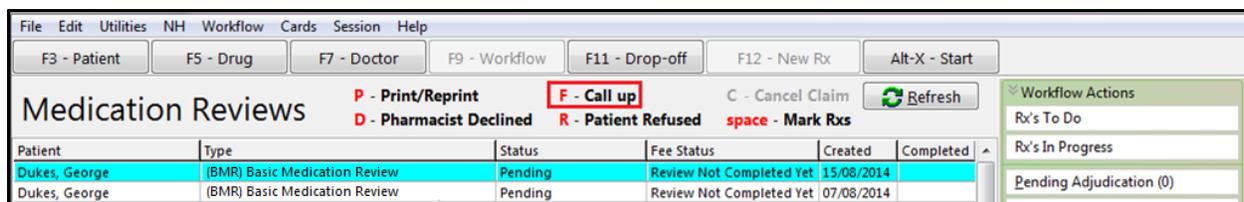
- Bring up the patient card using the **F3 Patient** search and select **Medication Review/Dialogs** from the right navigation pane.
- The Medication Reviews queue will appear with all the Medication Review records that are pending review. Select the Medication Review record you want to complete and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



Patient	Type	Status	Fee Status	Created	Completed
Dukes, George	(BMR) Basic Medication Review	Pending	Review Not Completed Yet	15/08/2014	
Dukes, George	(BMR) Basic Medication Review	Pending	Review Not Completed Yet	07/08/2014	

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**.



Patient	Type	Status	Fee Status	Created	Completed
Dukes, George	(BMR) Basic Medication Review	Pending	Review Not Completed Yet	15/08/2014	
Dukes, George	(BMR) Basic Medication Review	Pending	Review Not Completed Yet	07/08/2014	

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

Sample Paper Medication Review Report

(BMR) Basic Medication Review



<i>Name</i> Taylor, Barbara		<i>Gender</i> Female	<i>Date of Birth</i> 01-Jan-1980
<i>Address</i> 100 Main St, Charlottetown PE M1M 1M1		<i>Phone</i>	<i>PHN</i>
<i>Family Doctor</i>		<i>Family Doctor Phone</i>	<i>Family Doctor Fax</i>
<i>Allergies</i>			
<i>Conditions</i> Asthma, unspecified, with stated status asthmaticus; Hypertension secondary to endocrine disorders, benign or unspecified			
<i>Smoking</i> <input type="checkbox"/> No <input type="checkbox"/> Yes, # cigarettes/day:		<i>Alcohol Intake</i> <input type="checkbox"/> No <input type="checkbox"/> Yes, # drinks/week:	<i>Caffeine Intake</i> <input type="checkbox"/> No <input type="checkbox"/> Yes, # cups/day:
<i>Other Nicotine/Drugs</i> <input type="checkbox"/> No <input type="checkbox"/> Yes:			

Health Information

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
<i>Other immunizations/travel vaccines</i>					
<i>What is your biggest concern about your medications today</i>					

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

The Prince Edward Island Pharmacists Association in collaboration with the Canadian Pharmacists Association have adapted the CPhA PharmaCheck™ program to meet the needs of Prince Edward Islanders. PharmaCheck™ is a trademark of the Canadian Pharmacists Association and is used under license.

Page 1 of 2



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**.

Medication Review View

(BMR) Basic Medication Review 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 %

(BMR) Basic Medication Review



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
<input type="checkbox"/> No <input type="checkbox"/> Yes, # cigarettes/day:	<input type="checkbox"/> No <input type="checkbox"/> Yes, # drinks/week:	<input type="checkbox"/> No <input type="checkbox"/> Yes, # cups/day:	<input type="checkbox"/> No <input type="checkbox"/> Yes:		
Health Information					
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?					

Brightness Contrast Saturation

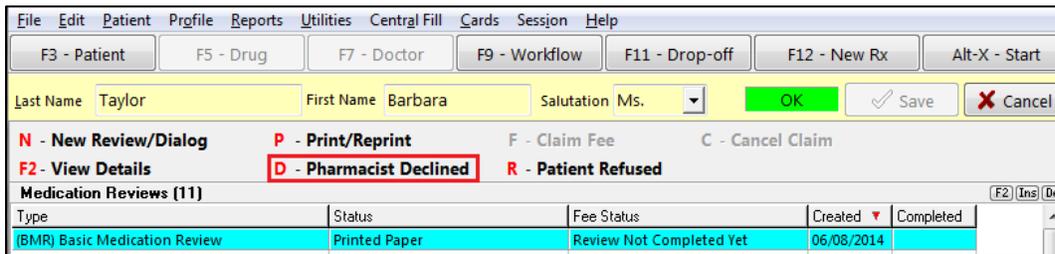
Declined and Refused Medication Reviews

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

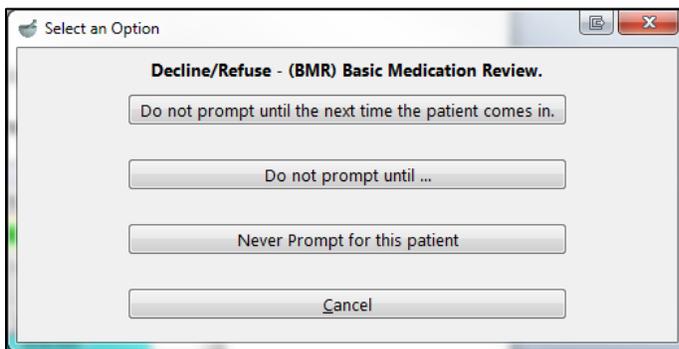
NOTE: The medication review records that are declined by the pharmacist or patient refused can also be noted from the Medication Review queue on the F9-Workflow screen.

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**.



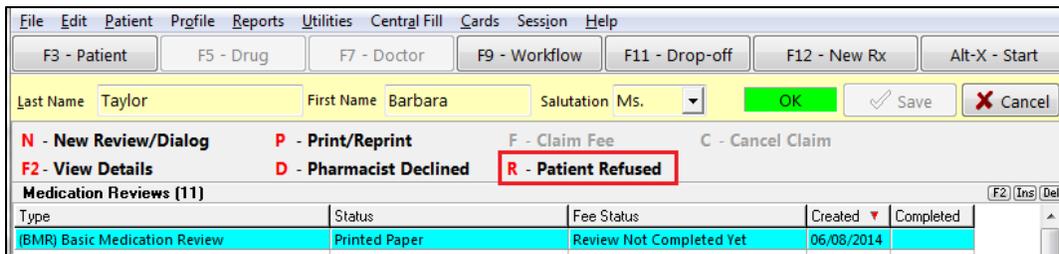
4. Select the appropriate option from the **Decline/Refuse** prompt.



- 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**.



File Edit Patient Profile Reports Utilities Central Fill Cards Session Help

F3 - Patient F5 - Drug F7 - Doctor F9 - Workflow F11 - Drop-off F12 - New Rx Alt-X - Start

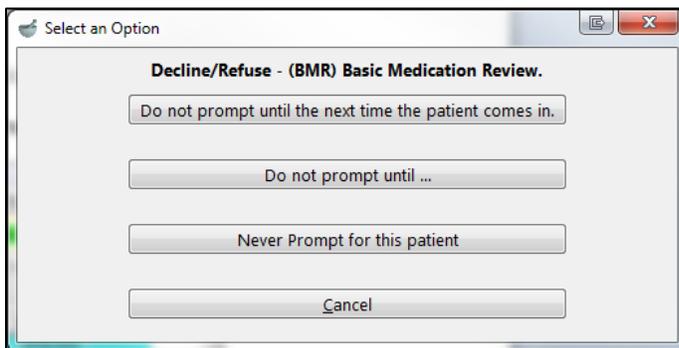
Last Name Taylor First Name Barbara Salutation Ms. OK Save Cancel

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

Medication Reviews (11)

Type	Status	Fee Status	Created	Completed
(BMR) Basic Medication Review	Printed Paper	Review Not Completed Yet	06/08/2014	

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



Select an Option

Decline/Refuse - (BMR) Basic Medication Review.

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.

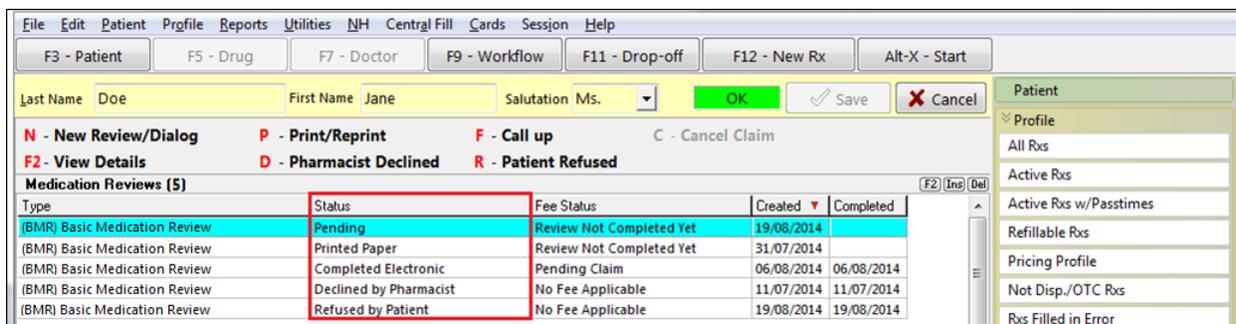
- If you select **Do not prompt until...** you will be prompted to specify the next time you want to be prompted for the patient’s Medication Review. Complete the form and click **OK**.
- If you select **Never Prompt for this patient** you will not receive any additional Medication Review prompts for the patient.

NOTE: Medication Review records that have been 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



Type	Status	Fee Status	Created	Completed
(BMR) Basic Medication Review	Pending	Review Not Completed Yet	19/08/2014	
(BMR) Basic Medication Review	Printed Paper	Review Not Completed Yet	31/07/2014	
(BMR) Basic Medication Review	Completed Electronic	Pending Claim	06/08/2014	06/08/2014
(BMR) Basic Medication Review	Declined by Pharmacist	No Fee Applicable	11/07/2014	11/07/2014
(BMR) Basic Medication Review	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.

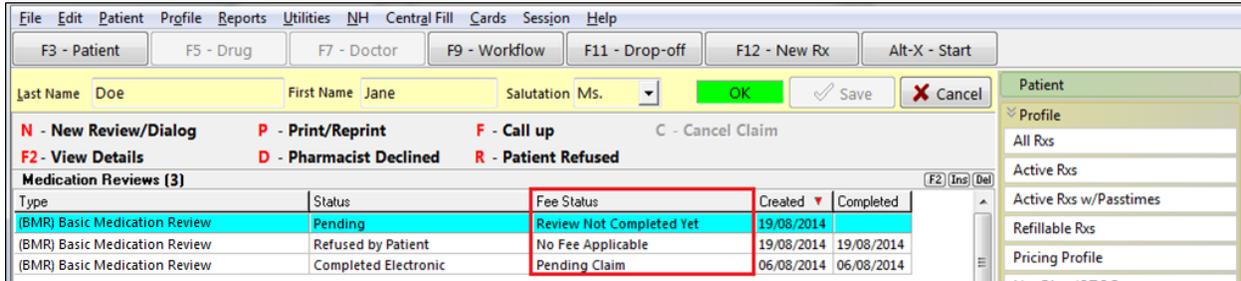
Declined by Pharmacist

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
(BMR) Basic Medication Review	Pending	Review Not Completed Yet	19/08/2014	
(BMR) Basic Medication Review	Refused by Patient	No Fee Applicable	19/08/2014	19/08/2014
(BMR) Basic Medication Review	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.