

# Medication Reviews

---

Saskatchewan



**KROLL**  
Computer Systems Inc.

---

# Contents

|  |           |
|--|-----------|
| <b>Configuration.....</b>                              | <b>1</b>  |
| Configuring Electronic Signatures.....                 | 1         |
| Configuring Electronic Medication Reviews.....         | 2         |
| <b>Electronic Medication Reviews.....</b>              | <b>3</b>  |
| 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 Reviews ‘Saved for Later’.....   | 19        |
| Sample Electronic Medication Review Report.....        | 20        |
| Viewing a Completed Medication Review.....             | 22        |
| <b>Paper Medication Reviews.....</b>                   | <b>24</b> |
| Configuring the Medication Review Prompt.....          | 24        |
| Creating a Paper Medication Review (Manual).....       | 26        |
| Scanning Medication Review Reports.....                | 28        |
| Billing a Medication Review.....                       | 30        |
| Completing Medication Reviews ‘Saved for Later’.....   | 30        |
| Sample Paper Medication Review Report.....             | 31        |
| Viewing a Completed Medication Review.....             | 33        |
| <b>Declined and Refused Medication Reviews.....</b>    | <b>34</b> |
| Pharmacist Declined.....                               | 34        |
| Patient Refused.....                                   | 35        |
| <b>Medication Review Statuses.....</b>                 | <b>36</b> |
| Statuses.....  | 36        |
| Fee Statuses.....                                      | 37        |

# Medication Reviews - Saskatchewan

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.

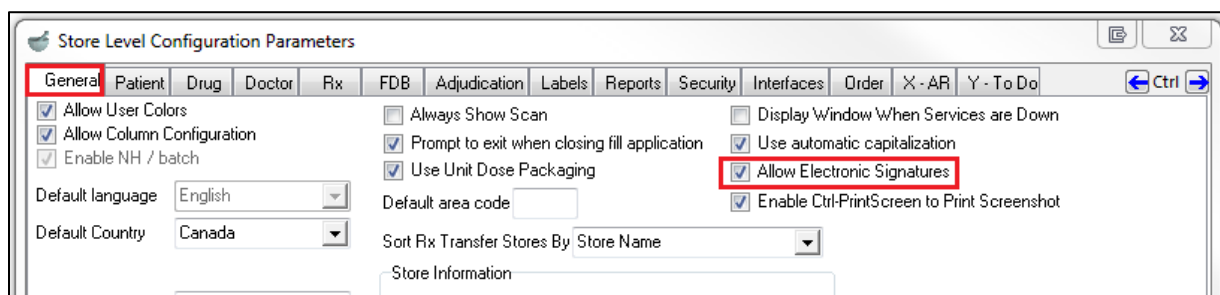
### Configuring Electronic Signatures

**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.



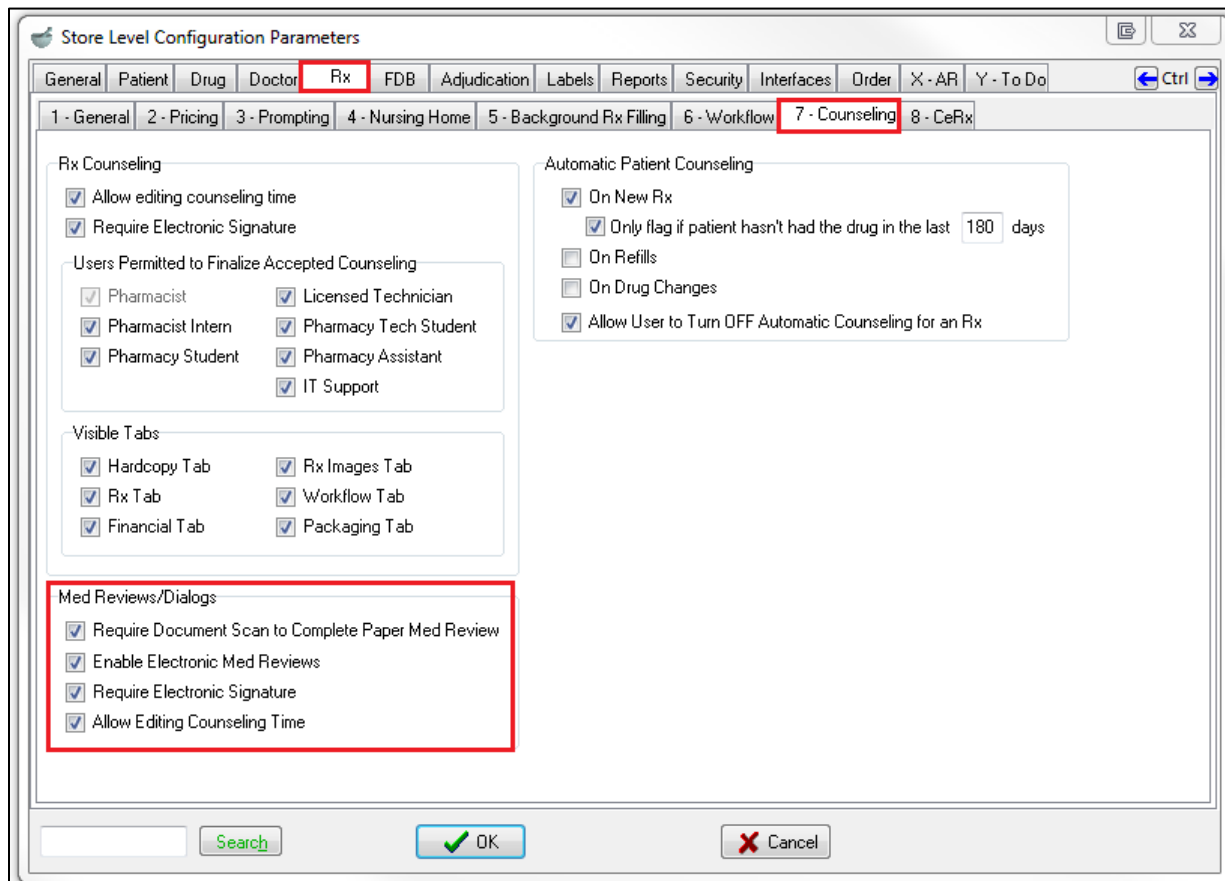
1. Go to **File > Configuration > Store > General**.
2. Place a checkmark next to **Allow Electronic Signatures**.



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 Reviews using the document scan functionality;
- **Enable Electronic Med Reviews:** enabling this option allows you to use the electronic version of Medication Reviews;
- **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.

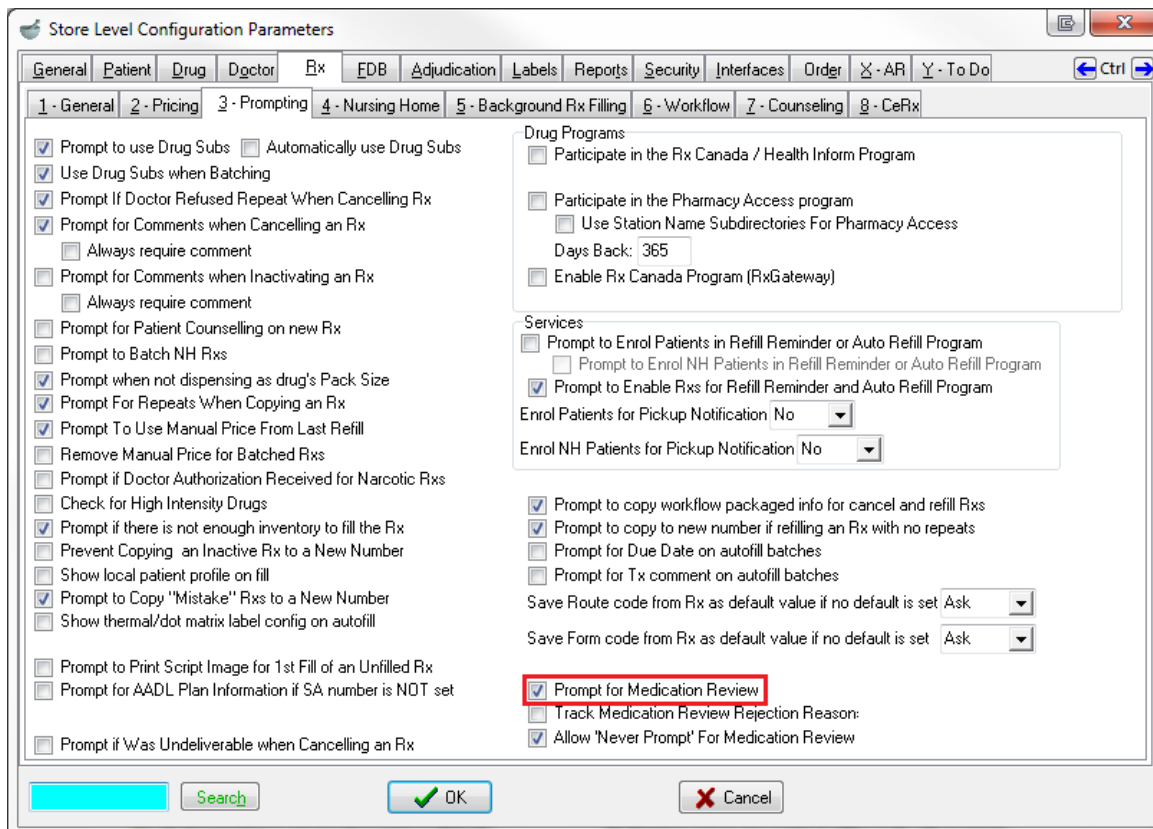
## Electronic Medication Reviews

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.

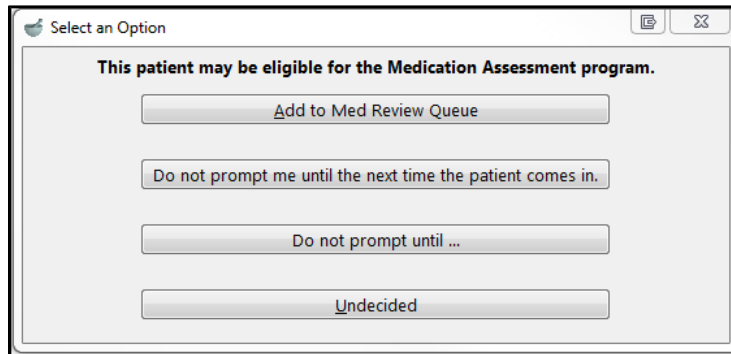
**NOTE:** The automatic prompts will not appear if the patient does not meet the criteria for a Medication Review. However, based on other available information and your professional judgement, you can determine whether the patient might benefit from a Medication Review and then manually create a Medication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

### Configuring the Medication Review Prompt

The system prompts for Meds Check when the option **Prompt for ODB Med Checks** is enabled under **File > Configuration > Store > Rx > Prompting**.



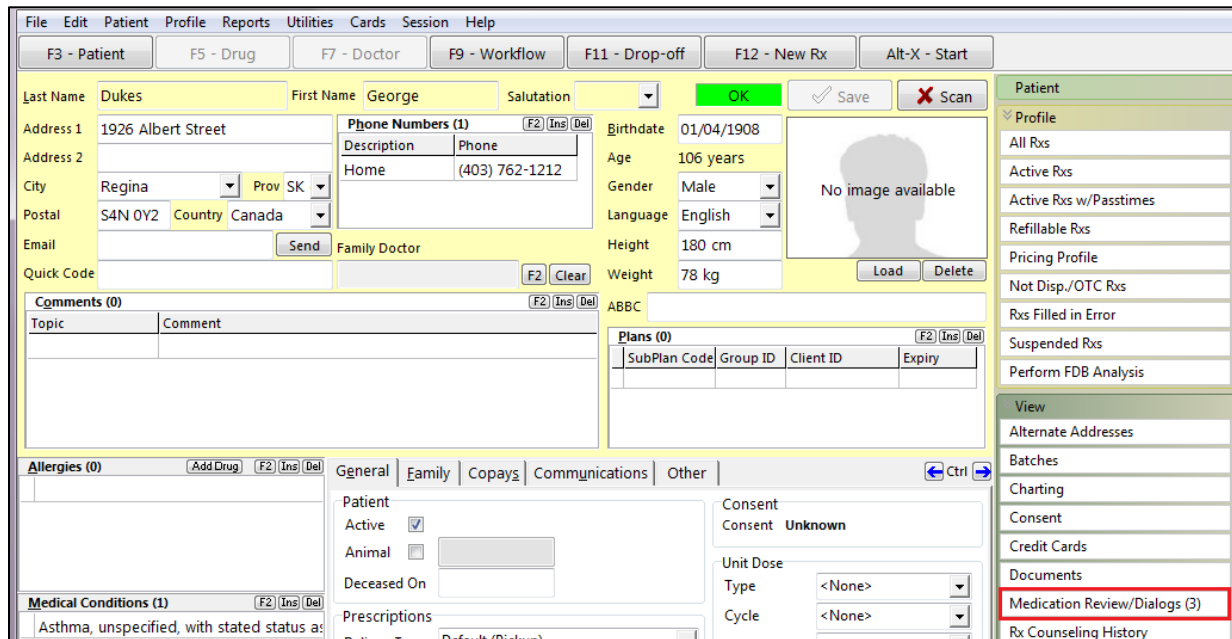
When the option '**Prompt for Medication Review**' is enabled, the system screens each patient for Medication Review eligibility every time an Rx is processed. If the patient is eligible, the user is prompted and presented with a number of options as shown below.



- **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 MedsCheck ‘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.

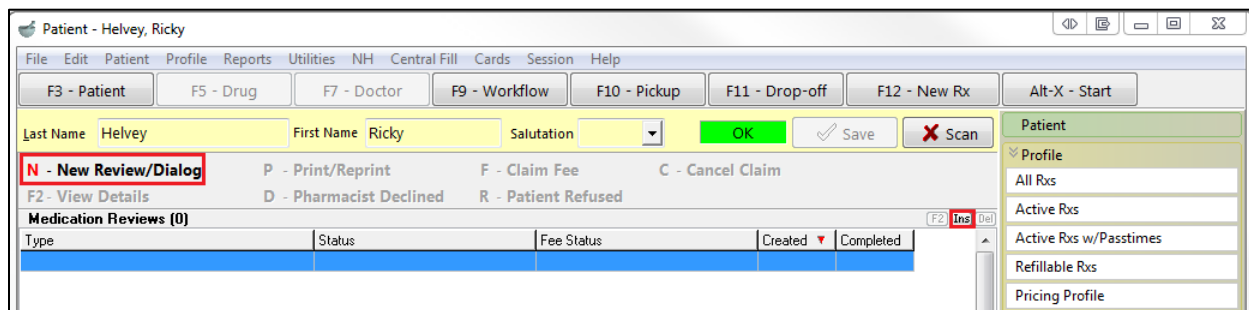
## Creating an Electronic Medication Review (Manual)

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



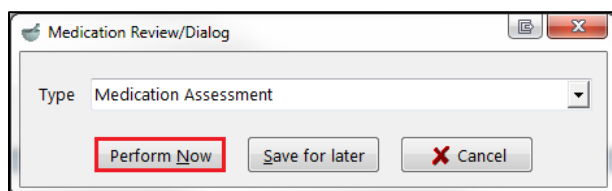
The screenshot shows a patient profile for George Dukes. The right-hand navigation pane is open, and the 'Medication Review/Dialogs (3)' option is highlighted with a red box. Other options in the pane include Profile, All Rxs, Active Rxs, Active Rxs w/Passtimes, Refillable Rxs, Pricing Profile, Not Disp./OTC 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**.



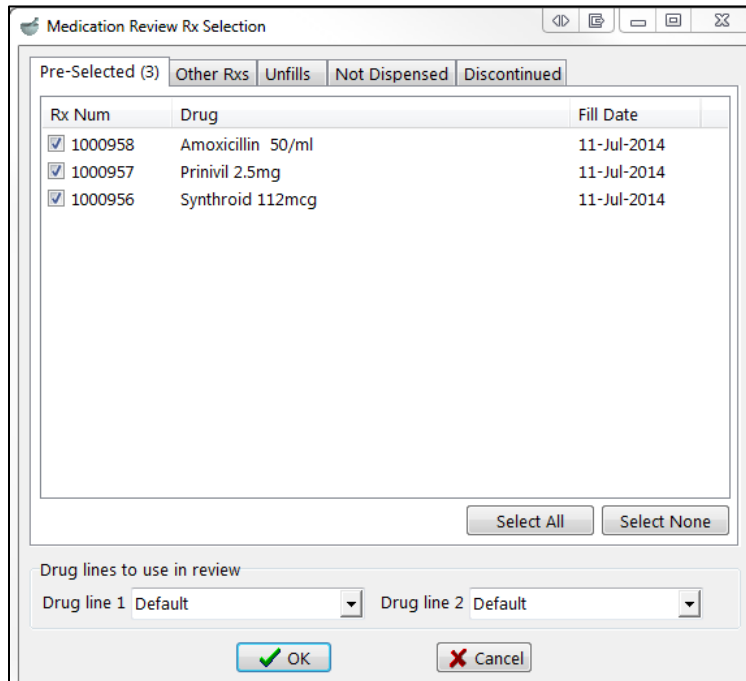
The screenshot shows the 'Medication Reviews (0)' window for Ricky Helvey. The 'N - New Review/Dialog' button is highlighted with a red box. The window also displays a table with columns for Type, Status, Fee Status, Created, and Completed.

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



The screenshot shows the 'Medication Review/Dialog' dialog box. The 'Type' dropdown menu is set to 'Medication Assessment'. 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**.



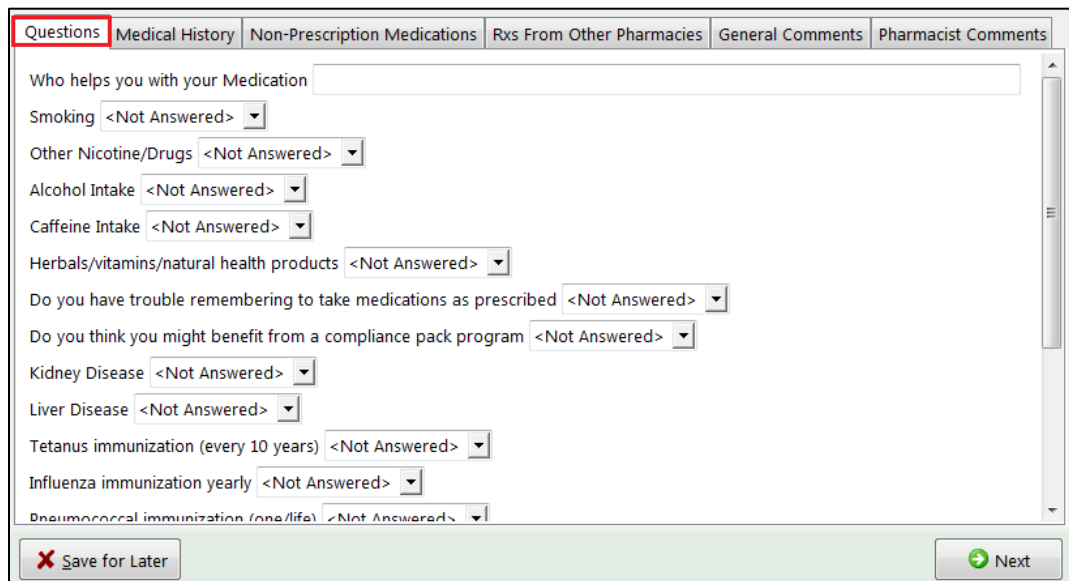
6. The **Medication Assessment** screen will appear. Click **Next** to proceed through the tabs, completing the required fields as you go.

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



## Questions

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



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

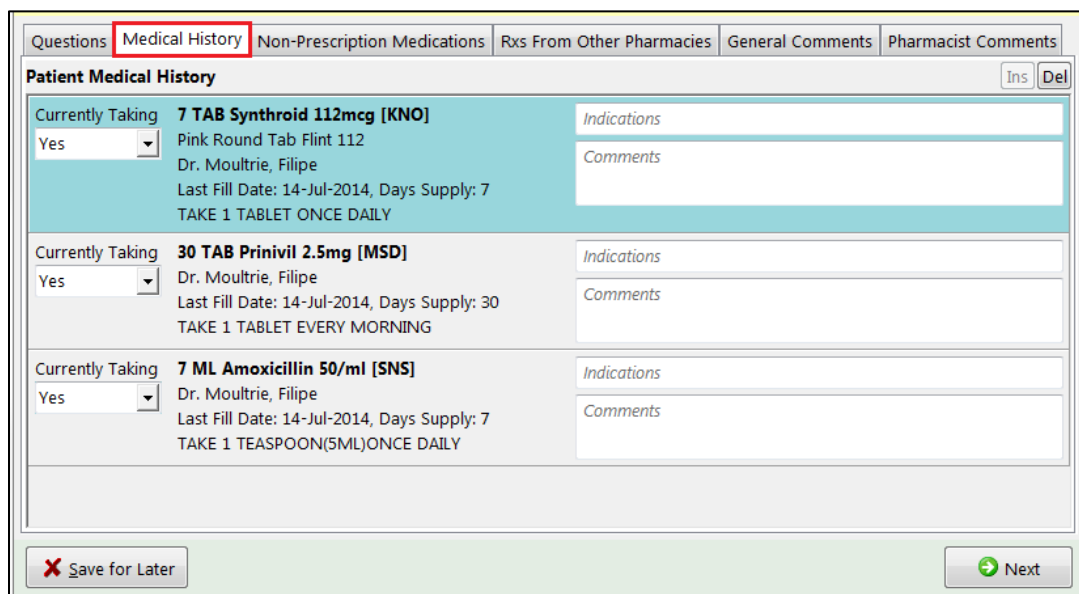
Influenza immunization yearly <Not Answered>

Pneumococcal immunization (one/life) <Not Answered>

Save for Later Next

## Medical History

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



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

**Patient Medical History** Ins Del

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

Save for Later Next

For each medication listed:

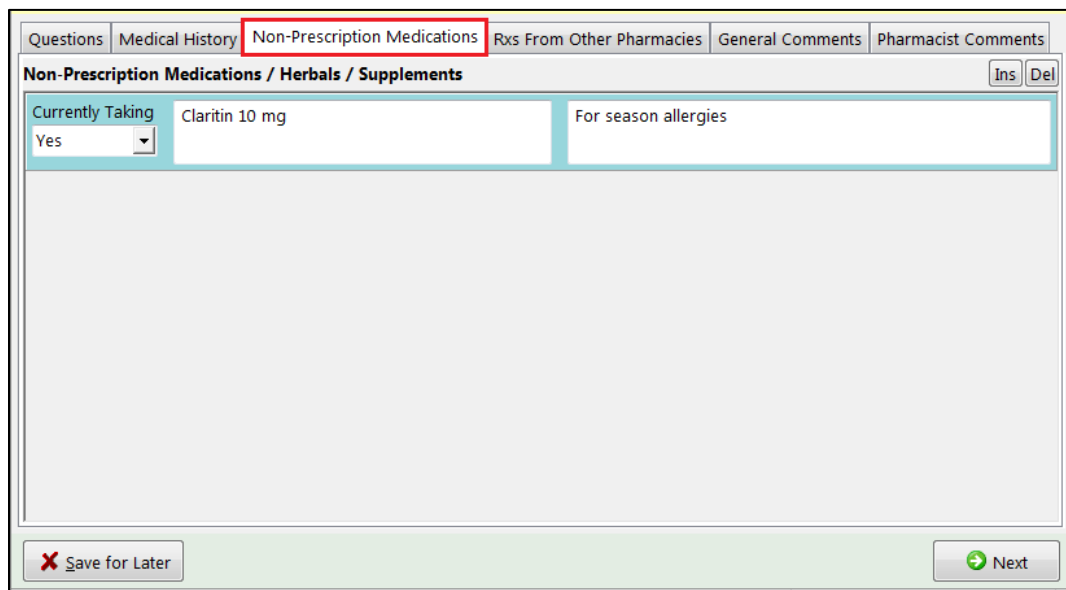
- Note if the patient is currently taking the specified medications and select **Yes/No** from the dropdown list.
- Enter the reason for using the medication based on the patient’s feedback in the **Indications** field.
- Enter any general comments in the **Comments** field.

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

### Non-Prescription Medications

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

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



| Currently Taking | Medication     | Indications          |
|------------------|----------------|----------------------|
| Yes              | Claritin 10 mg | For season allergies |

- 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.

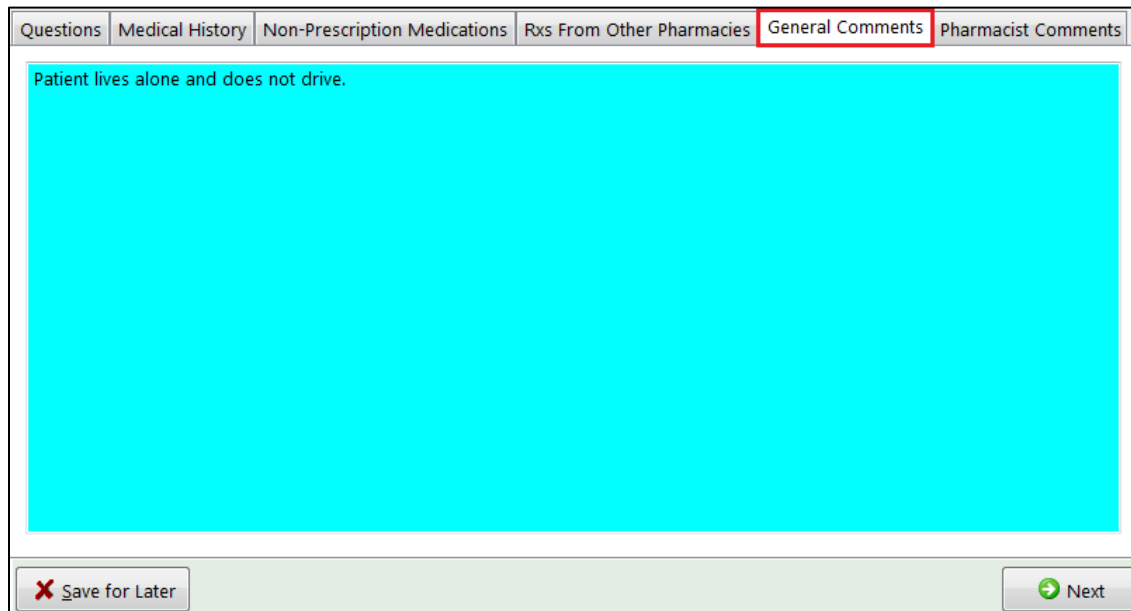
| Questions   | Medical History  | Non-Prescription Medications  | Rxs From Other Pharmacies | General Comments | Pharmacist Comments |
|---|--|---|---------------------------|------------------|---------------------|
| <b>Prescriptions From Other Pharmacies</b> <span style="float: right;">Ins Del</span> |  |   |                           |                  |                     |
| Currently Taking<br>Yes   | Tylenol # 3 - Take 1 to 2 tablets up to 4 times a day when needed for pain | From - Smith's Pharmacy - (555) - 123-4567<br>Possible duplication of therapy |                           |                  |                     |
| Currently Taking<br>Yes   | Bisoprolol 5mg - take 1 tablet daily                                       | From - Duncan Mill Pharmacy - (555) - 555- 5555<br>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.

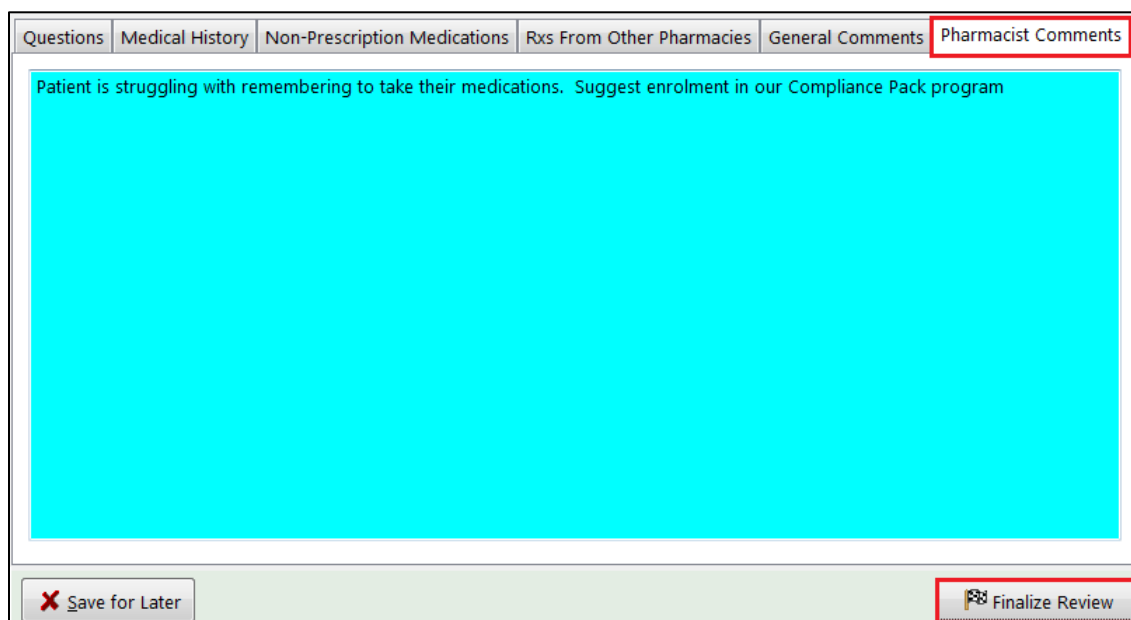


Questions | Medical History | Non-Prescription Medications | Rxs From Other Pharmacies | **General Comments** | Pharmacist Comments

Patient lives alone and does not drive.

## 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**

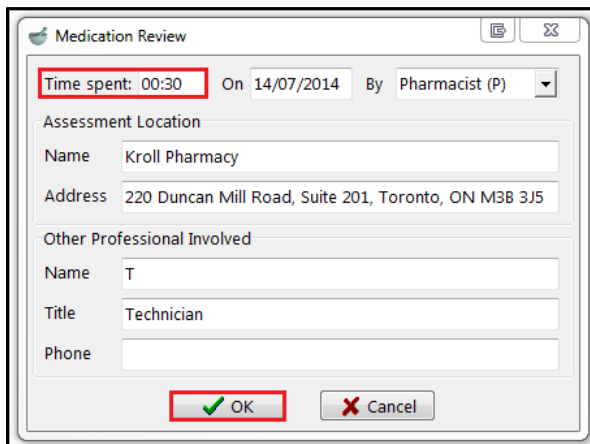
Patient is struggling with remembering to take their medications. Suggest enrolment in our Compliance Pack program

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 dialog box titled "Medication Review". At the top, there are fields for "Time spent: 00:30", "On 14/07/2014", and "By Pharmacist (P)". Below this is the "Assessment Location" section with "Name" set to "Kroll Pharmacy" and "Address" set to "220 Duncan Mill Road, Suite 201, Toronto, ON M3B 3J5". The "Other Professional Involved" section has "Name" set to "T", "Title" set to "Technician", and "Phone" is empty. At the bottom, there are "OK" and "Cancel" buttons. The "Time spent" field and the "OK" button are highlighted with red boxes.

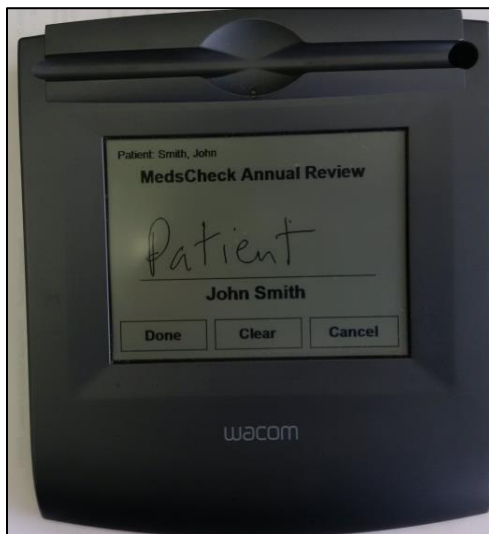
## Affixing an Electronic Signature

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

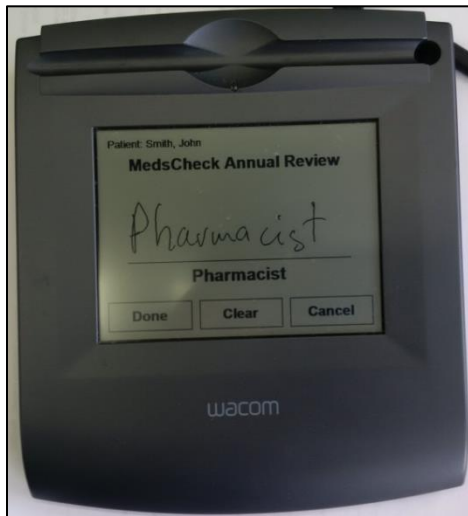
9. Have the patient sign his or her name on the electronic signature tablet. Click the **OK** button on the signature tablet.



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



10. Have the pharmacist sign the electronic signature tablet.



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

## Printing a Medication Review

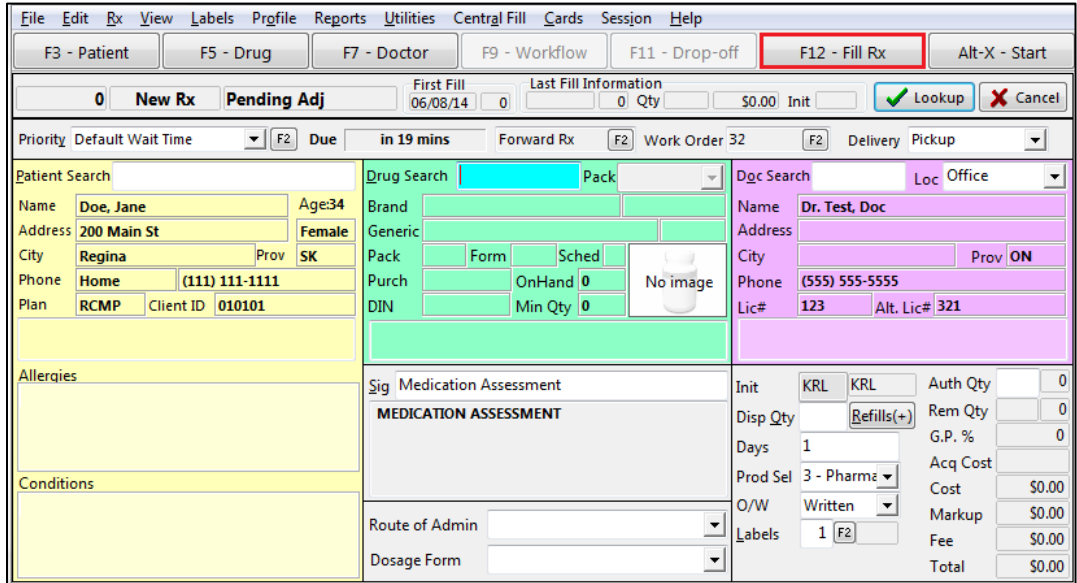
12. A prompt will appear asking if you want to print a paper copy of the electronic Medication Review. Click **Yes**.
13. The **Medication Review report** print form will appear. Select the appropriate print options and click **Print** and provide this copy to the patient.

## Billing a Medication Review

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

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

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



File Edit Rx View Labels Profile Reports Utilities Central Fill Cards Session Help

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

0 New Rx Pending Adj First Fill 06/08/14 Last Fill Information 0 Qty \$0.00 Init

Priority Default Wait Time  Due in 19 mins Forward Rx  Work Order 32  Delivery Pickup

Patient Search: Name Doe, Jane Age 34 Address 200 Main St City Regina Prov SK Phone Home (111) 111-1111 Plan RCMP Client ID 010101

Drug Search: Pack [dropdown] Brand [dropdown] Generic [dropdown] Pack [dropdown] Form [dropdown] Sched [dropdown] Purch [dropdown] OnHand 0 No image DIN [dropdown] Min Qty 0

Doc Search: Name Dr. Test, Doc Address [dropdown] City [dropdown] Prov ON Phone (555) 555-5555 Lic# 123 Alt. Lic# 321

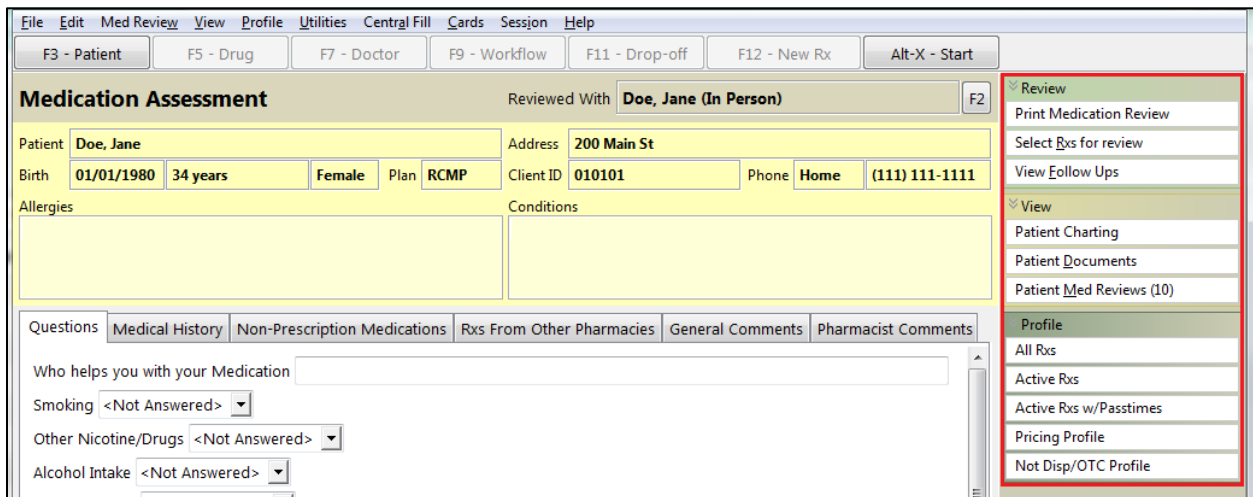
Medication Assessment: Sig Medication Assessment [text area] MEDICATION ASSESSMENT

Route of Admin [dropdown] Dosage Form [dropdown]

Init KRL KRL Auth Qty 0 Disp Qty [dropdown] Refills(+) Rem Qty 0 Days 1 G.P. % 0 Prod Sel 3 - Pharmz Acq Cost \$0.00 O/W Written Cost \$0.00 Labels 1  Markup \$0.00 Fee \$0.00 Total \$0.00

## Medication Review Options

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



File Edit Med Review View Profile Utilities Central Fill Cards Session Help

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

**Medication Assessment** Reviewed With Doe, Jane (In Person)

Patient Doe, Jane Address 200 Main St Birth 01/01/1980 34 years Female Plan RCMP Client ID 010101 Phone Home (111) 111-1111

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

Who helps you with your Medication [text area] Smoking <Not Answered> Other Nicotine/Drugs <Not Answered> Alcohol Intake <Not Answered>

Right Navigation Pane (highlighted):

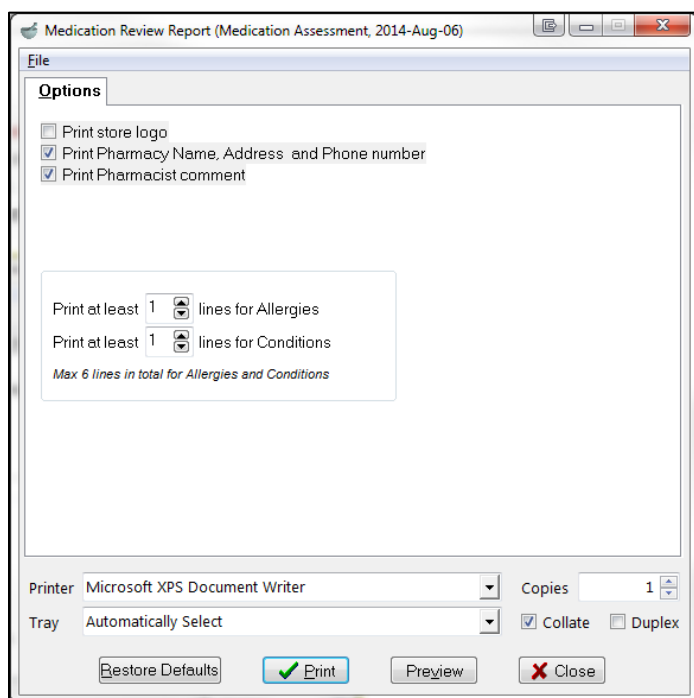
- Review
  - Print Medication Review
  - Select Rxs for review
  - View Follow Ups
- View
  - Patient Charting
  - Patient Documents
  - Patient Med Reviews (10)
- Profile
  - All Rxs
  - Active Rxs
  - Active Rxs w/Passtimes
  - Pricing Profile
  - Not Disp/OTC Profile



## Review

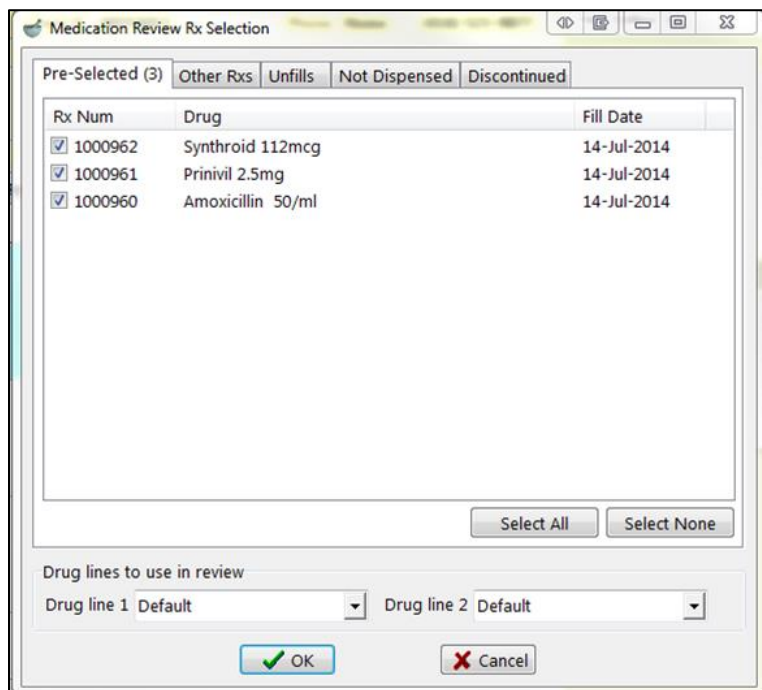
### Print Medication Review

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

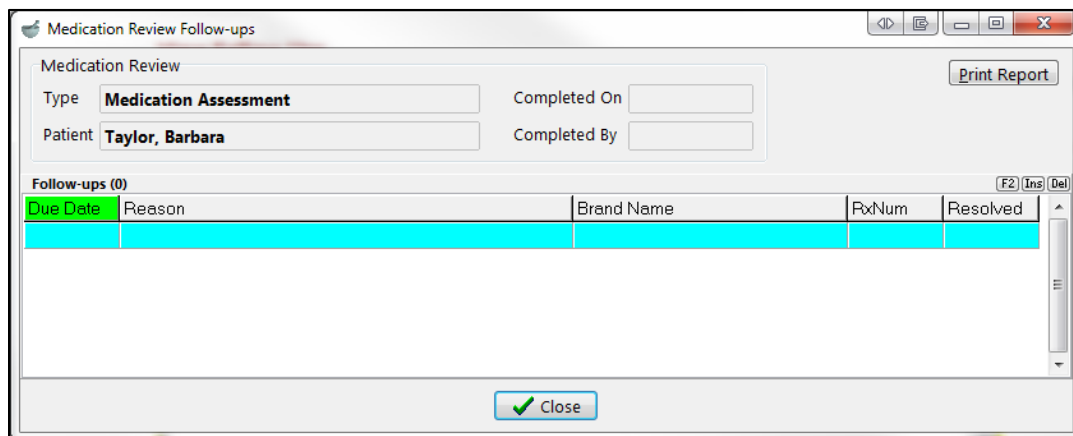
If you wish to add/edit Rx's on the Medical History tab, click the button Select Rx's for review. When selected, the **Medication Review Rx Selection** screen will appear, allowing you to add and remove items from the **Medical History** tab on the **Medication Review** screen. Click **OK** to save any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



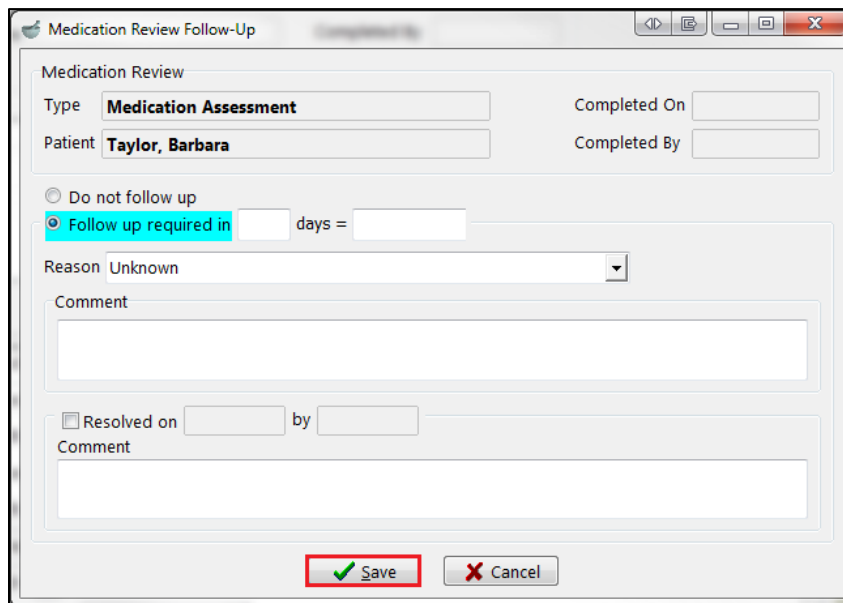
### View Follow Ups

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.



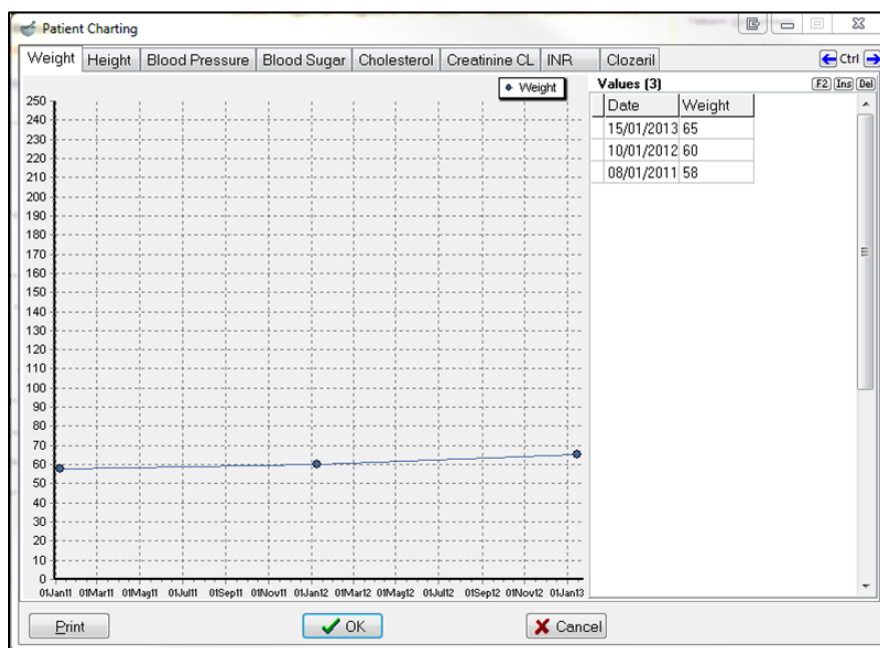
To add a follow-up, click **Ins** and complete the **Medication Review Follow-up** screen. When you are finished, click **Save**.



## View

### Patient Charting

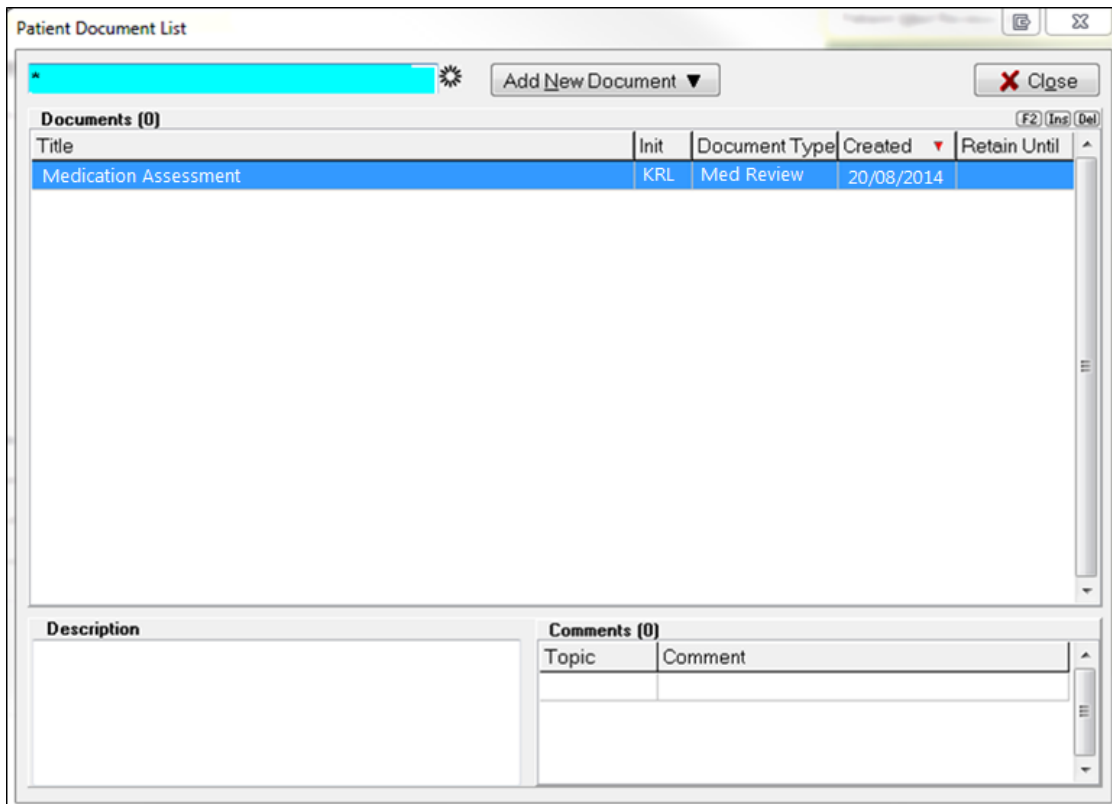
When this option is selected, the **Patient Charting** form will appear, displaying information about the patient's weight, height, blood pressure, blood sugar, and so on.



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

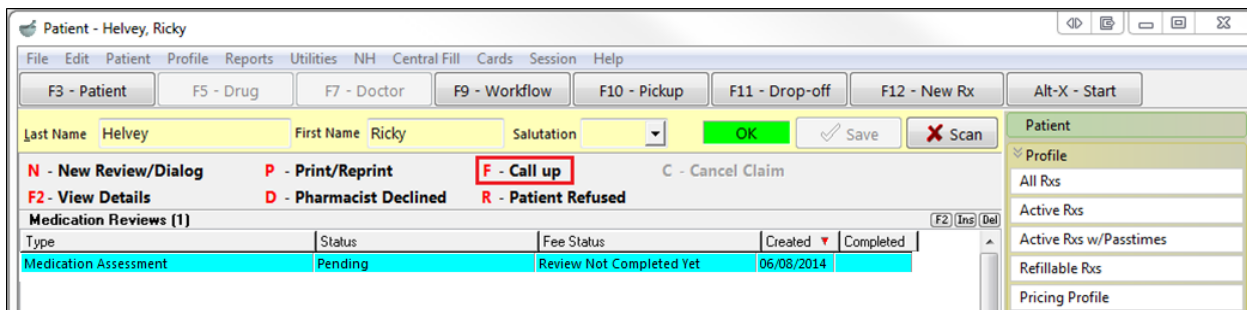
The **Profile** menu on the **Medication Review** screen is identical to the **Profile** menu on the patient profile. This menu allows you to view **All Rxs, Active Rxs, Active Rxs w/ Passtimes, Pricing Profile, and Not Disp/OTC Profile.**

## Completing Medication Reviews ‘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

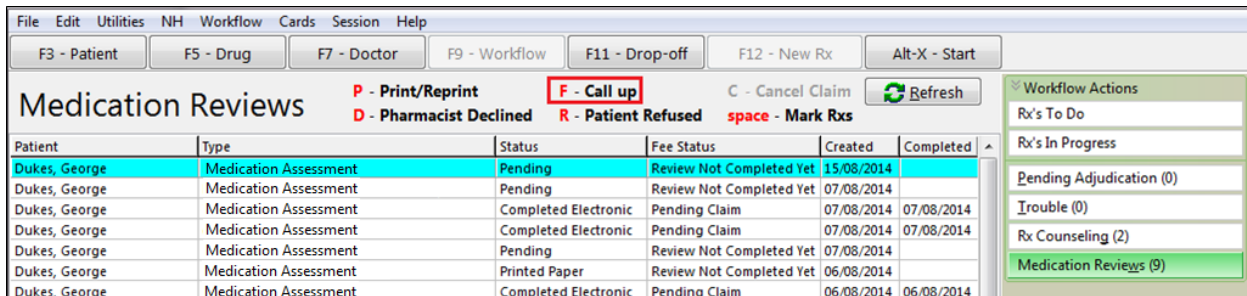
- Bring up the patient card using the **F3 Patient** search and select **Medication Review/Dialogs** from the right navigation pane.
- The Medication Reviews queue appears with all the Med Review records that are pending review.



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

### F9 - Workflow


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



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

## Sample Electronic Medication Review Report

### Medication Assessment






|   |   |   |  |
|---|---|---|--|
| <i>Name</i><br><b>Doe, Jane</b>   |   | <i>Gender</i><br><b>Female</b>  | <i>Date of Birth</i><br><b>01-Jan-1980</b>   |
| <i>Address</i><br><b>200 Main St, Regina SK M1M 1M1</b>                                       |   | <i>Phone</i><br><b>(111)111-1111</b>  | <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><br><input type="checkbox"/> No <input type="checkbox"/> Yes, # cigarettes/day: | <i>Alcohol Intake</i><br><input type="checkbox"/> No <input type="checkbox"/> Yes, # drinks/week: | <i>Caffeine Intake</i><br><input type="checkbox"/> No <input type="checkbox"/> Yes, # cups/day: | <i>Other Nicotine/Drugs</i><br><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<br>Brand/Generic | Strength/Dose     | How to take this Medication<br>(frequency, time of day, etc.) | Purpose | Comments | Prescriber    |
|-------------------------------------|-------------------|---|---------|----------|---------------|
| Actonel                             | 30mg - 30 TAB     | TAKE 1 TABLET ONCE DAILY                                      |         |          | Dr. Test, Doc |
| A.C. & C                            | 375/8/15mg-30 TAB | TAKE 1 TABLET ONCE DAILY                                      |         |          | Dr. Test, Doc |

The Pharmacists' Association of Saskatchewan in collaboration with the Canadian Pharmacists Association have adapted the CPhA PharmaCheck™ program. The PharmaCheck™ logo is a trademark of the Canadian Pharmacists Association and is used under license.

Page 1 of 2

**Medication Assessment**

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

The Pharmacists' Association of Saskatchewan in collaboration with the Canadian Pharmacists Association have adapted the CPhA PharmaCheck™ program. The PharmaCheck™ logo is a trademark of the Canadian Pharmacists Association and is used under license.

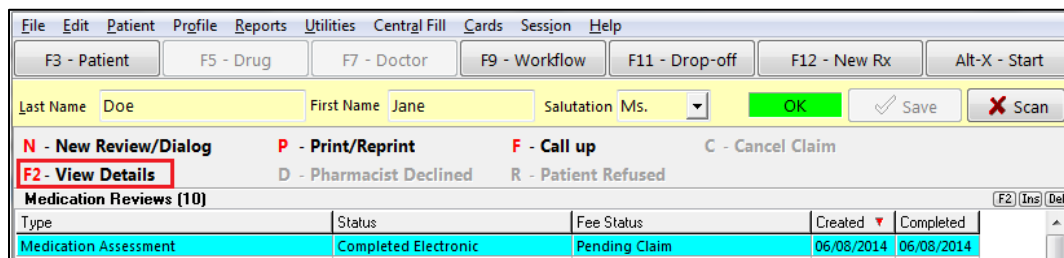
Page 2 of 2



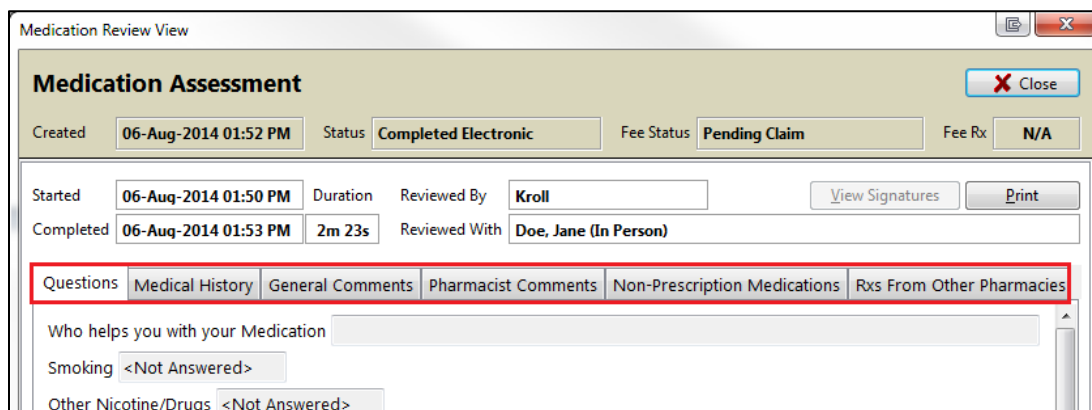
## Viewing a Completed Medication Review

### 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**.



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



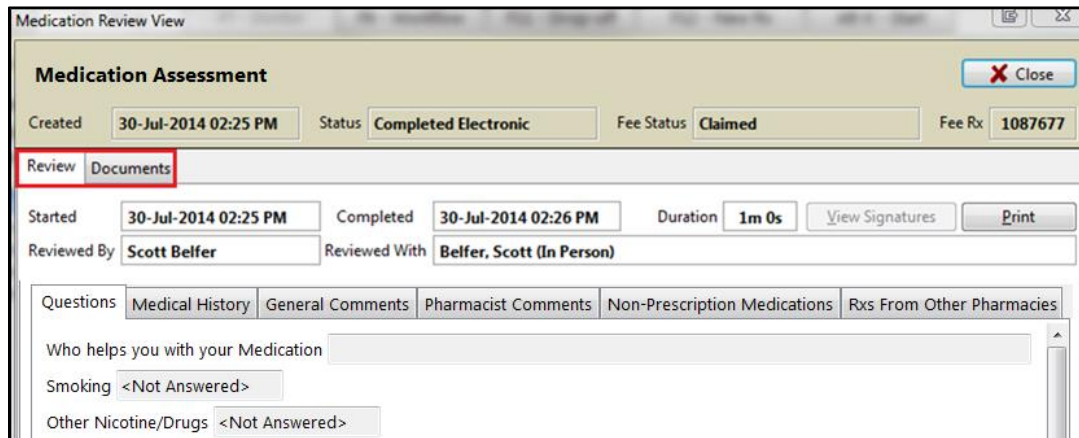
5. Click **Print** to print the Medication Review, or **View Signatures** to view the pharmacist's or patient's electronic signature.

### 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**.



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



The screenshot shows the 'Medication Review View' window. At the top, it says 'Medication Assessment' with a 'Close' button. Below that, there are fields for 'Created' (30-Jul-2014 02:25 PM), 'Status' (Completed Electronic), 'Fee Status' (Claimed), and 'Fee Rx' (1087677). There are two tabs: 'Review' and 'Documents', with 'Review' selected. Below the tabs, there are fields for 'Started' (30-Jul-2014 02:25 PM), 'Completed' (30-Jul-2014 02:26 PM), and 'Duration' (1m 0s). There are also buttons for 'View Signatures' and 'Print'. Below that, there are fields for 'Reviewed By' (Scott Belfer) and 'Reviewed With' (Belfer, Scott (In Person)). At the bottom, there are tabs for 'Questions' (Medical History, General Comments, Pharmacist Comments, Non-Prescription Medications, Rxs From Other Pharmacies) and a list of questions: 'Who helps you with your Medication', 'Smoking <Not Answered>', and 'Other Nicotine/Drugs <Not Answered>'.

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

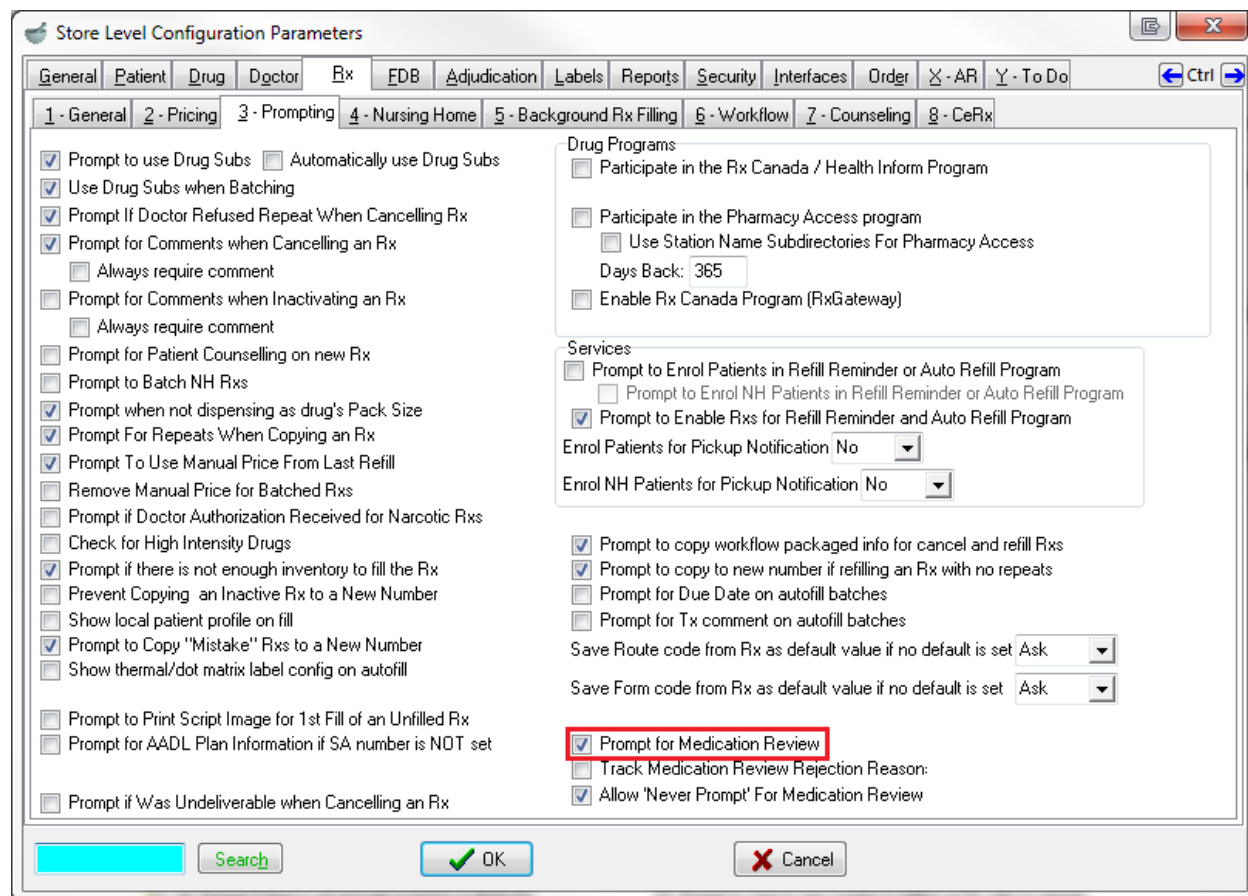
# Paper Medication Reviews

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

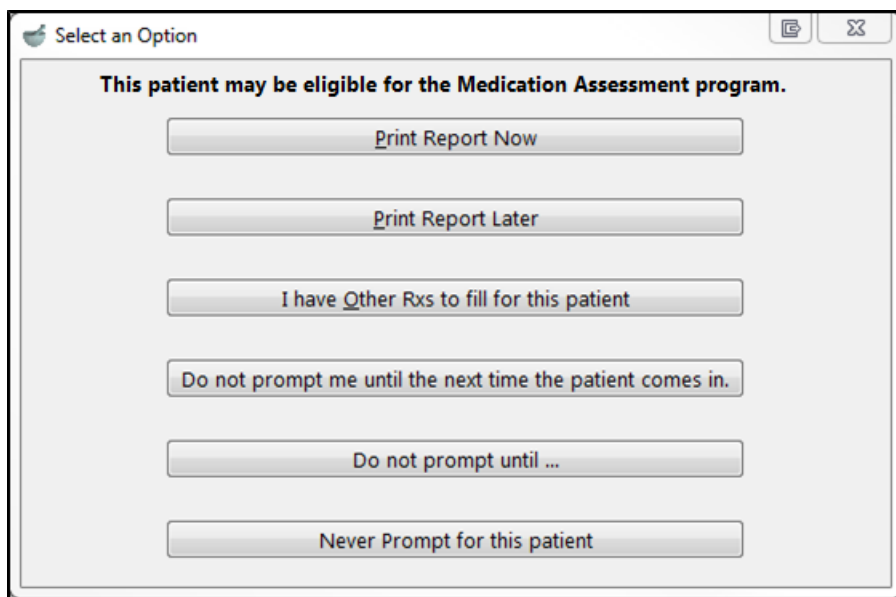
**NOTE:** The automatic prompts will not appear if the patient does not meet the criteria for a Medication Review. However, based on other available information and your professional judgement, you can determine whether the patient might benefit from a Medication Review and then manually create a Medication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

## Configuring the Medication Review Prompt

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



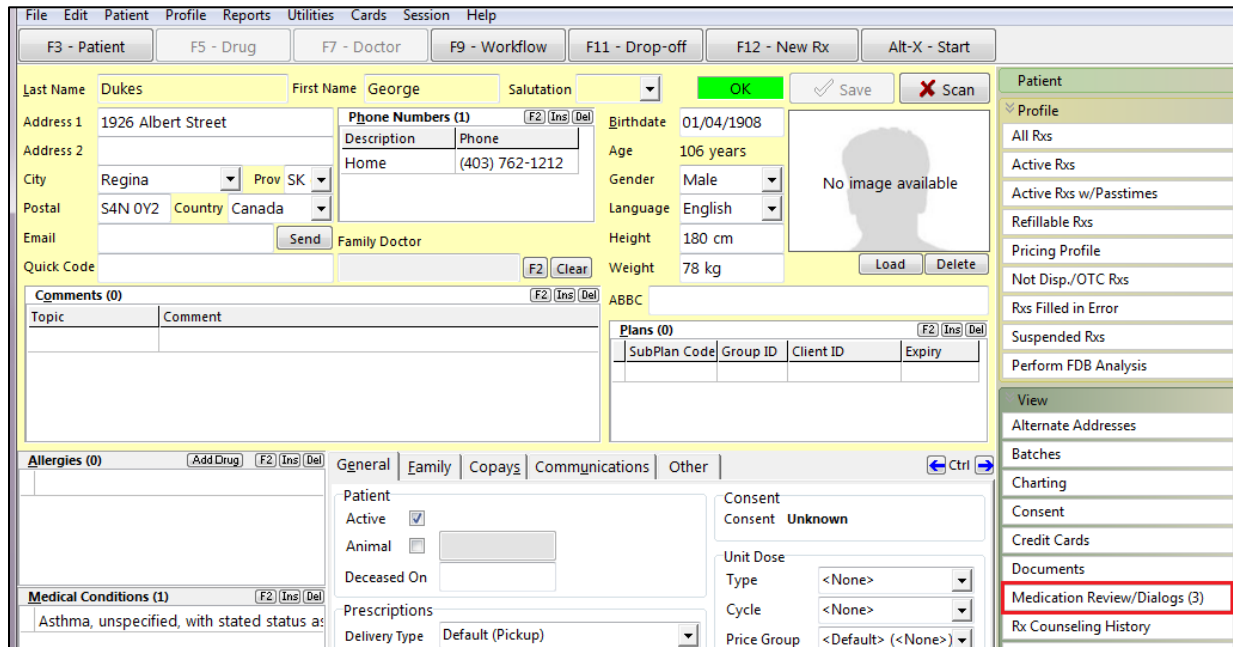
When the option '**Prompt for Medication Review**' is enabled, the system screens each patient for Medication Review eligibility every time an Rx is processed. If the patient is eligible, the user is prompted and presented with a number of options as shown below.



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

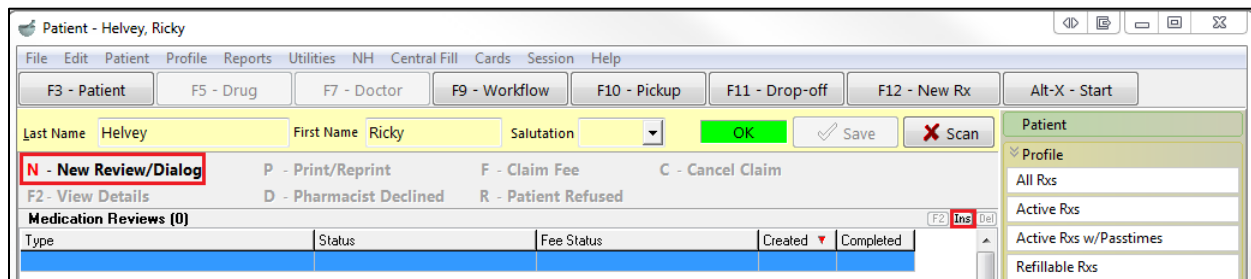
## Creating a Paper Medication Review (Manual)

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



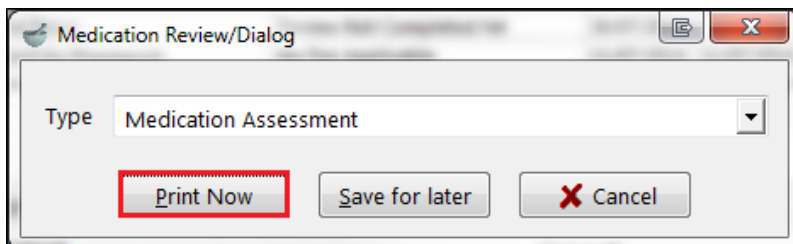
The screenshot shows a patient profile for George Dukes. The right-hand navigation pane is open, and the 'Medication Review/Dialogs (3)' option is highlighted with a red box. Other options in the pane include Profile, All Rxs, Active Rxs, Active Rxs w/Pasetimes, Refillable Rxs, Pricing Profile, Not Disp./OTC 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 queue will appear. Click **N – New Review/Dialog**.



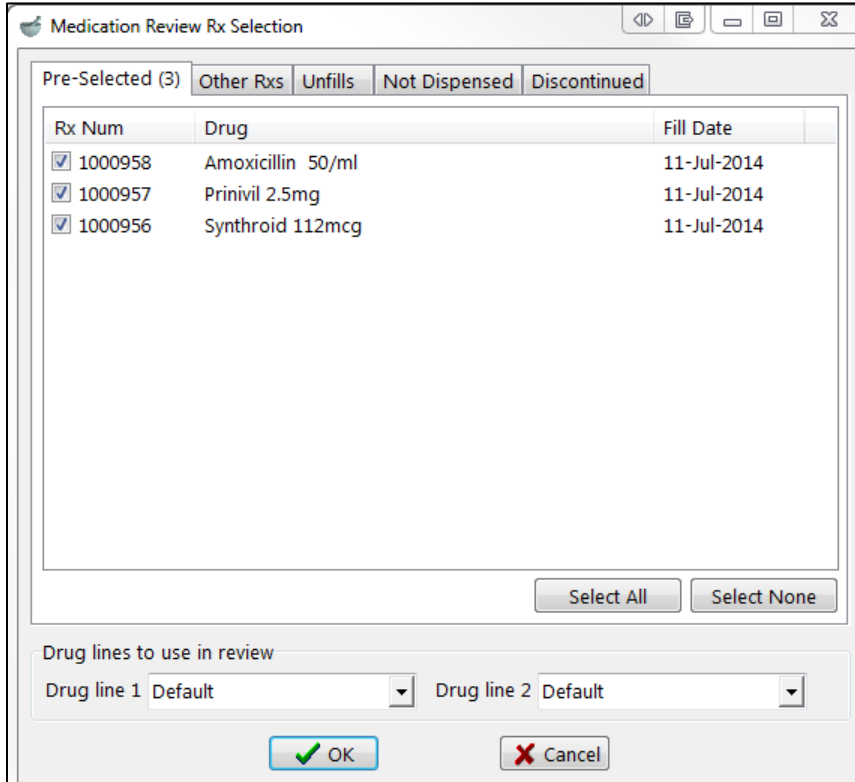
The screenshot shows the 'Medication Reviews (0)' window. The 'N - New Review/Dialog' button is highlighted with a red box. Below the button are several keyboard shortcuts: P - Print/Reprint, F - Claim Fee, C - Cancel Claim, F2 - View Details, D - Pharmacist Declined, and R - Patient Refused. A table with columns for Type, Status, Fee Status, Created, and Completed is visible below the shortcuts.

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



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

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



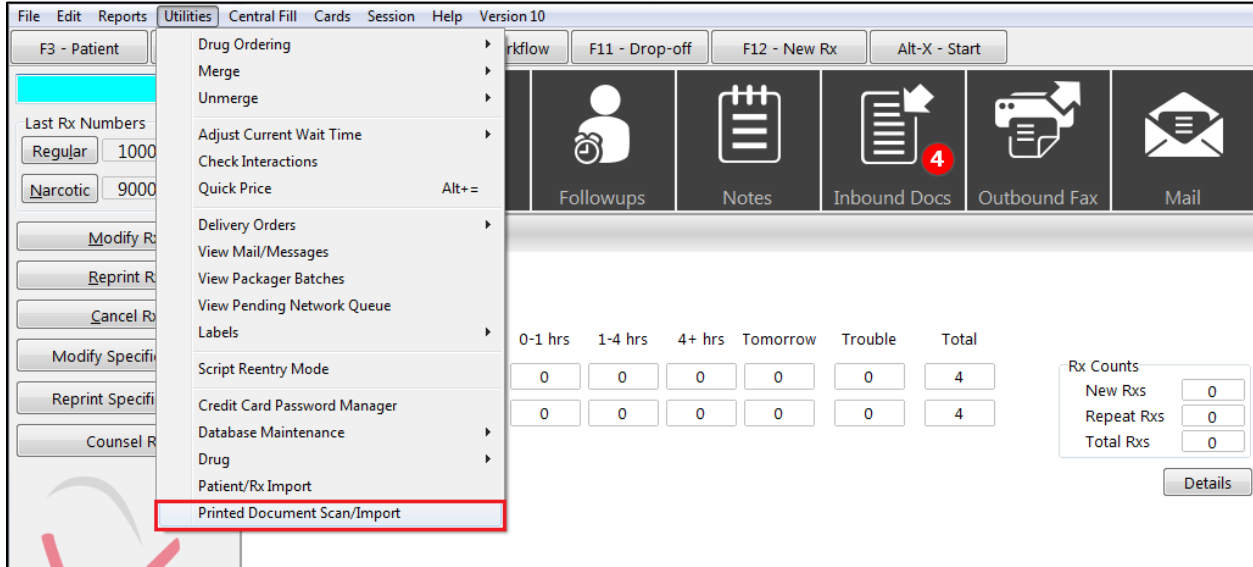
The screenshot shows a window titled "Medication Review Rx Selection". It has a tabbed interface with the following tabs: "Pre-Selected (3)", "Other Rxs", "Unfills", "Not Dispensed", and "Discontinued". The "Pre-Selected (3)" tab is active, displaying a table with three rows of medication data. Each 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". At the very bottom are "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 |

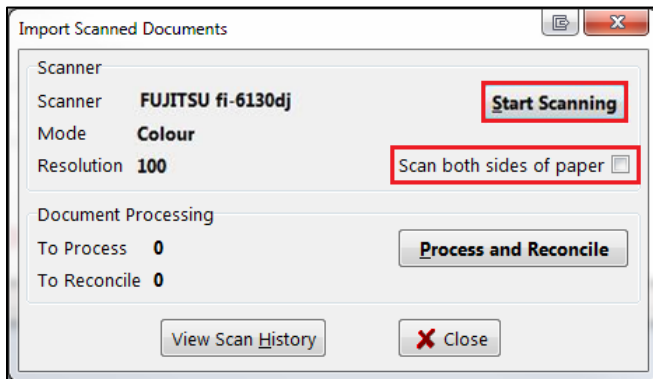
6. The **Medication Review Report** form will appear. Select the appropriate print options and click **Print**. The report will generate.
7. Complete the Medication Review on the form. Sign the **Medication Review Report** and have the patient do the same.

## Scanning Medication Review Reports

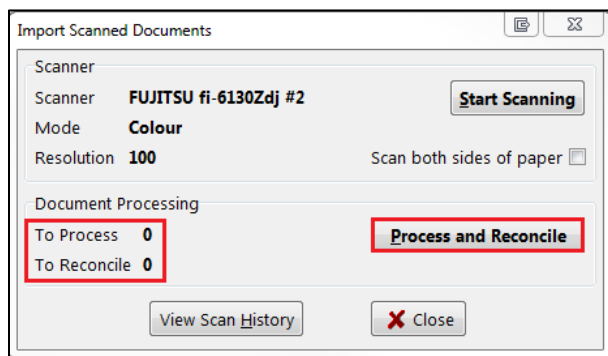
8. From the **Alt-X Start** screen, go to **Utilities > Printed Document Scan/Import**.



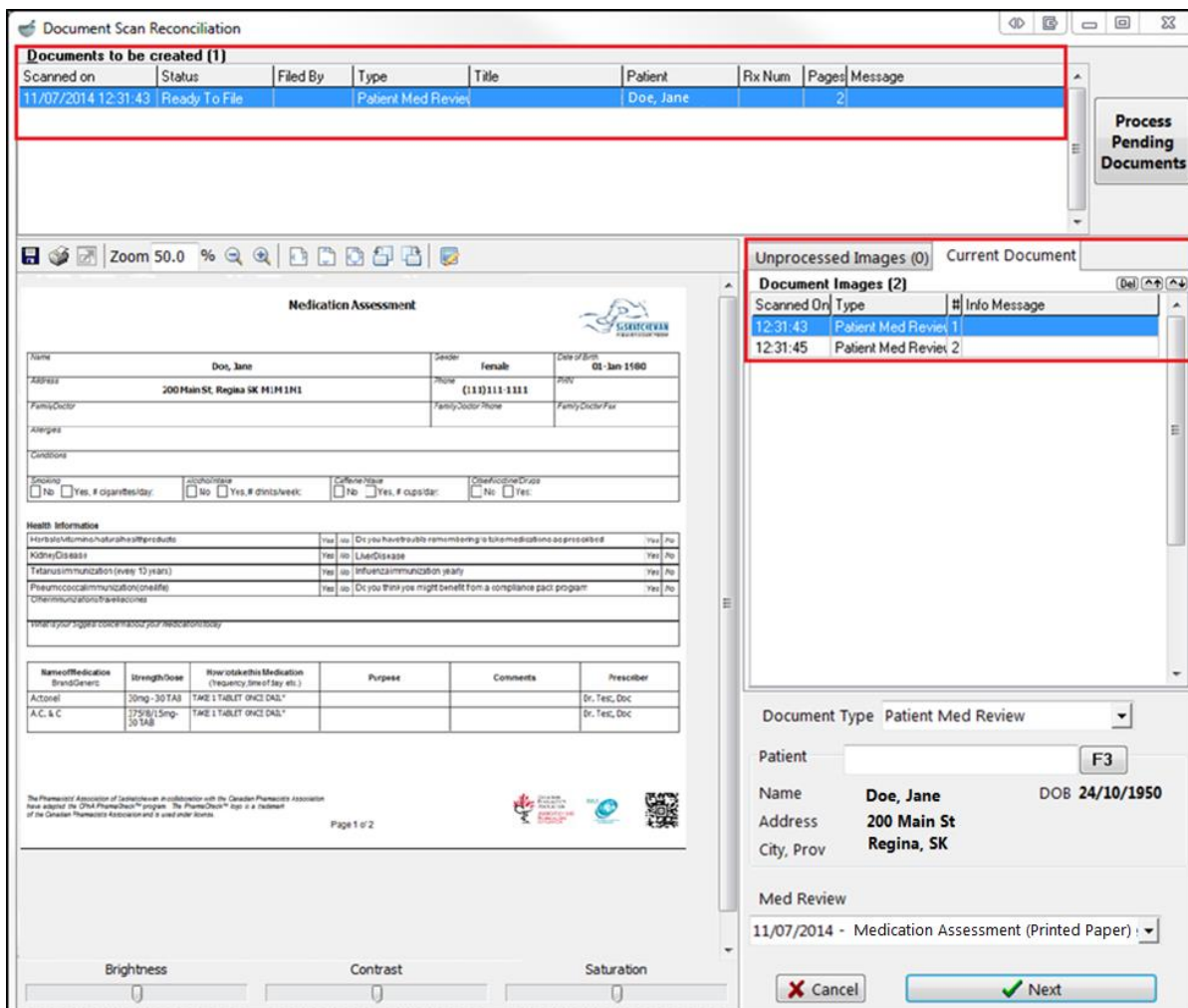
9. The **Import Scanned Documents** screen will appear. Place the report pages face down on the scanner hopper. Check **Scan both sides of paper** if you are scanning pages with information on both sides and your scanner supports dual side scanning. Click **Start Scanning**.



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.

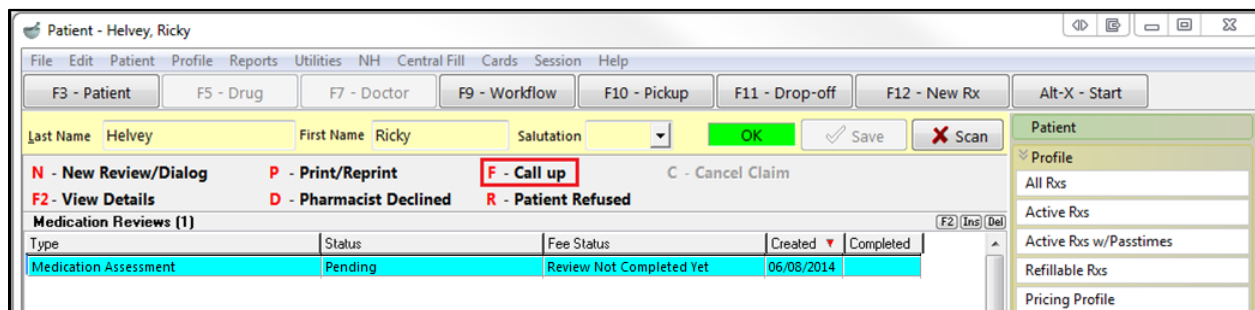
14. Click **F12 - Fill Rx**. The claim will be transmitted to the appropriate party for payment.

## Completing Medication Reviews ‘Saved for Later’

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

### Patient Card

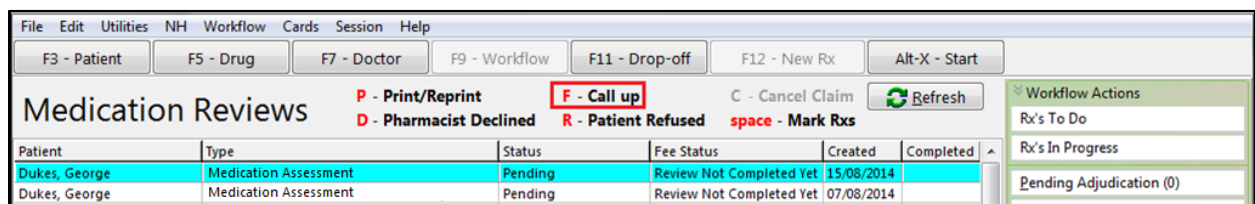
- Bring up the patient card using the **F3 Patient** search and select **Medication Review/Dialogs** from the right navigation pane.
- The Medication Reviews queue appears with all the Med Review records that are pending review.



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

### F9 - Workflow

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






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

## Sample Paper Medication Review Report

### Medication Assessment



|  |  |  |   |
|--|--|--|---|
| Name<br><b>Test, Pat</b>   |  | Gender<br><b>Male</b>  | Date of Birth<br><b>01-Jan-1955</b>   |
| Address<br><b>ON</b>   |  | Phone  | PHN   |
| Family Doctor  |  | Family Doctor Phone  | Family Doctor Fax   |
| Allergies  |  |  |   |
| Conditions   |  |  |   |
| Smoking<br><input type="checkbox"/> No <input type="checkbox"/> Yes, # cigarettes/day: | Alcohol Intake<br><input type="checkbox"/> No <input type="checkbox"/> Yes, # drinks/week: | Caffeine Intake<br><input type="checkbox"/> No <input type="checkbox"/> Yes, # cups/day: | Other Nicotine/Drugs<br><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 |        |   |        |

| Name of Medication<br>Brand/Generic | Strength/Dose      | How to take this Medication<br>(frequency, time of day, etc.) | Purpose | Comments | Prescriber    |
|-------------------------------------|--------------------|---|---------|----------|---------------|
| Methyl dopa                         | 500mg - 30 TAB     | TAKE 1 TABLET ONCE DAILY                                      |         |          | Dr. Test, Doc |
| Elite                               | 20 STR             | TAKE 1 TABLET ONCE DAILY                                      |         |          | Dr. Test, Doc |
| A Hydrocort Inj                     | 100mg/vial - 30 ML | TAKE 1  |         |          | Dr. Test, Doc |
| Apo-Ciproflo                        | 500mg - 30 TAB     | TAKE 1 TABLET ONCE DAILY                                      |         |          | Dr. Test, Doc |
| 292                                 | 30mg - 30 TAB      | TAKE 1 TABLET ONCE DAILY                                      |         |          | Dr. Test, Doc |

*The Pharmacists' Association of Saskatchewan in collaboration with the Canadian Pharmacists Association have adapted the CPHA PharmaCheck™ program. The PharmaCheck™ logo is a trademark of the Canadian Pharmacists Association and is used under license.*

Page 1 of 2

**Medication Assessment**

| Name of Medication<br>Brand/Generic | Strength/Dose | How to take this Medication<br>(frequency, time of day, etc.) | Purpose | Comments | Prescriber    |
|-------------------------------------|---------------|---|---------|----------|---------------|
| Lipitor                             | 80mg - 3 TAB  | AS DIRECTED   |         |          | 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

\_\_\_\_\_

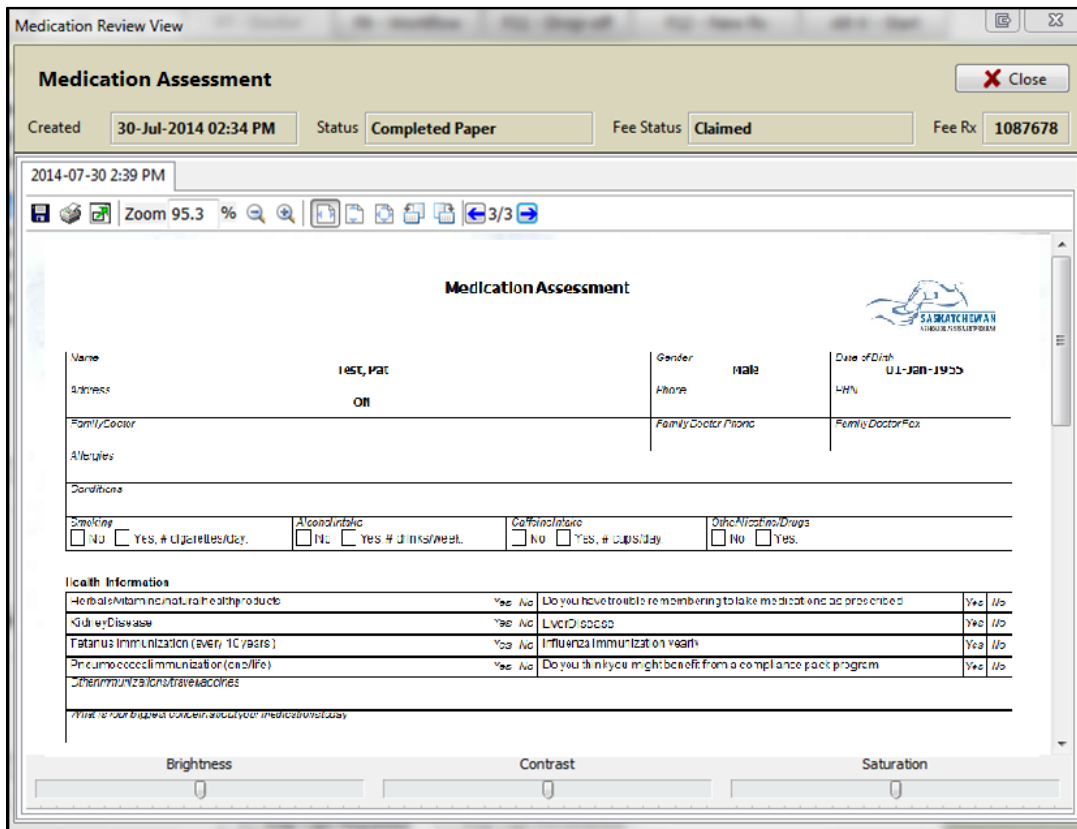
Kroll

The Pharmacists' Association of Saskatchewan in collaboration with the Canadian Pharmacists Association have adopted the CPHA PharmaCheck™ program. The PharmaCheck™ logo is a trademark of the Canadian Pharmacists Association and is used under license.



## 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**.



The screenshot shows a software window titled "Medication Review View" with a "Medication Assessment" form. The form includes a header with a "Close" button, a status bar with "Created: 30-Jul-2014 02:34 PM", "Status: Completed Paper", "Fee Status: Claimed", and "Fee Rx: 1087678". Below this is a toolbar with icons for save, print, zoom (95.3%), and navigation (3/3). The main form area contains the following fields:

|               |   |                     |   |                         |  |
|---------------|---|---------------------|---|-------------------------|--|
| Name          | IEST, PAT   | Gender              | Male  | Date of Birth           | 01-Jan-1955  |
| Address       | 011   | Phone               |   | Home                    |  |
| Family/Doctor |   | Family Doctor Phone |   | Family Doctor Fax       |  |
| Aliases       |   |                     |   |                         |  |
| Conditions    |   |                     |   |                         |  |
| Smoking       | <input type="checkbox"/> No <input type="checkbox"/> Yes, # Cigarettes/Day. | Alcohol intake      | <input type="checkbox"/> No <input type="checkbox"/> Yes # drinks/week. | Caffeine intake         | <input type="checkbox"/> No <input type="checkbox"/> Yes, # cups/day |
|               |   |                     |   | Other Medications/Drugs | <input type="checkbox"/> No <input type="checkbox"/> Yes.            |

**Health Information**

|   |        |  |        |
|---|--------|--|--------|
| Herbals/Vitamin/natural health products | Yes No | Do you have trouble remembering to take medication as prescribed | Yes No |
| Sticky/Diarrhea                         | Yes No | LVCID 92000  | 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 are your biggest concerns about your medication today?

At the bottom of the window are sliders for "Brightness", "Contrast", and "Saturation".

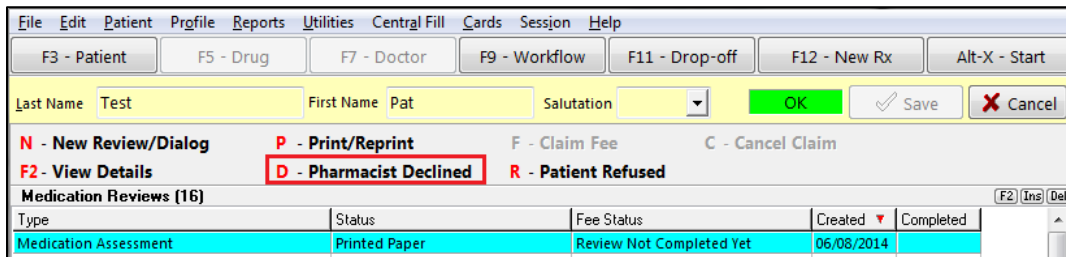
# Declined and Refused Medication Reviews

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

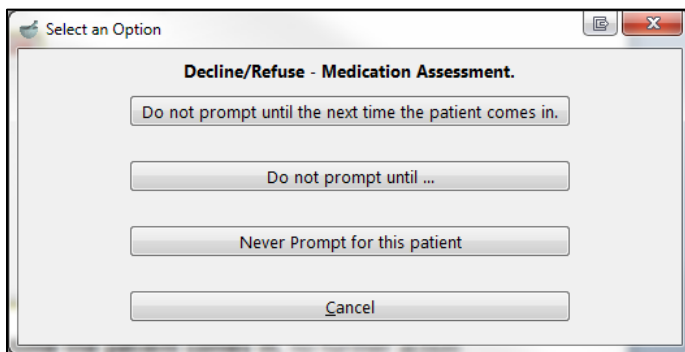
**NOTE:** The medication review records that are declined by the pharmacist or patient refused can also be noted from the Medication Review queue on the F9-Workflow screen.

## 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**.



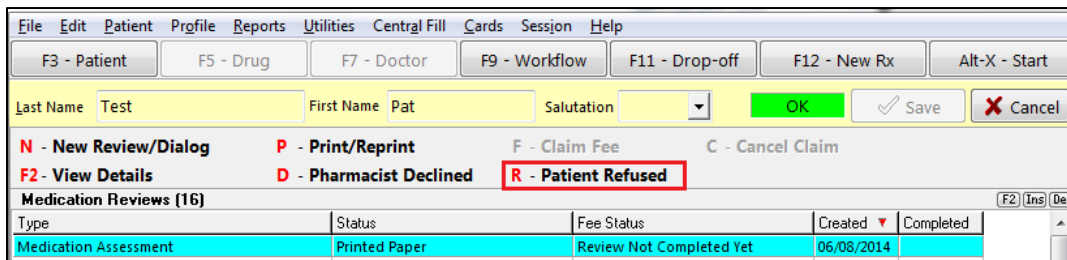
4. Select the appropriate option from the **Decline/Refuse** prompt.



- 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.

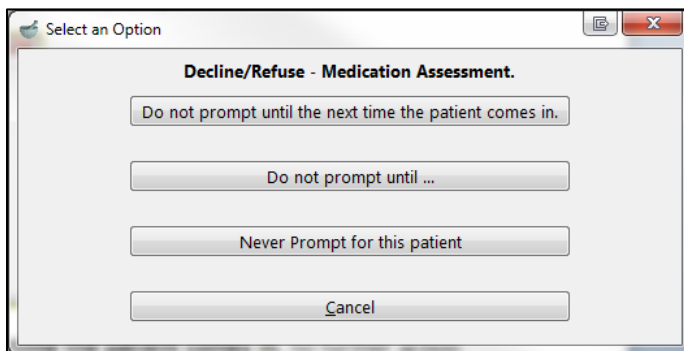
## Patient Refused

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**.



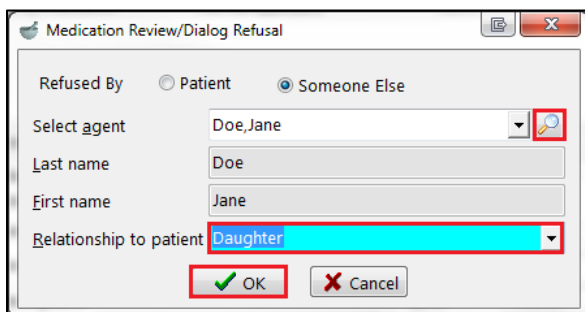
The screenshot shows a software interface with a menu bar (File, Edit, Patient, Profile, Reports, Utilities, Central Fill, Cards, Session, Help) and a toolbar with buttons for F3 - Patient, F5 - Drug, F7 - Doctor, F9 - Workflow, F11 - Drop-off, F12 - New Rx, and Alt-X - Start. Below the toolbar, there are input fields for Last Name (Test), First Name (Pat), and Salutation, with OK, Save, and Cancel buttons. A navigation pane contains options: N - New Review/Dialog, P - Print/Reprint, F - Claim Fee, C - Cancel Claim, F2 - View Details, D - Pharmacist Declined, and R - Patient Refused (highlighted). Below this is a table titled 'Medication Reviews (16)' with columns: Type, Status, Fee Status, Created, and Completed. The first row is highlighted in cyan: Medication Assessment, Printed Paper, Review Not Completed Yet, 06/08/2014.

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



The dialog box is titled 'Select an Option' and 'Decline/Refuse - Medication Assessment.' It contains four buttons: 'Do not prompt until the next time the patient comes in.', 'Do not prompt until ...', 'Never Prompt for this patient', and '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**.



The form is titled 'Medication Review/Dialog Refusal'. It has radio buttons for 'Refused By' with 'Patient' and 'Someone Else' (selected). Below is a 'Select agent' dropdown menu with 'Doe, Jane' and a lookup button. Below that are text boxes for 'Last name' (Doe) and 'First name' (Jane). A 'Relationship to patient' dropdown menu is set to 'Daughter'. At the bottom are 'OK' and 'Cancel' buttons.

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

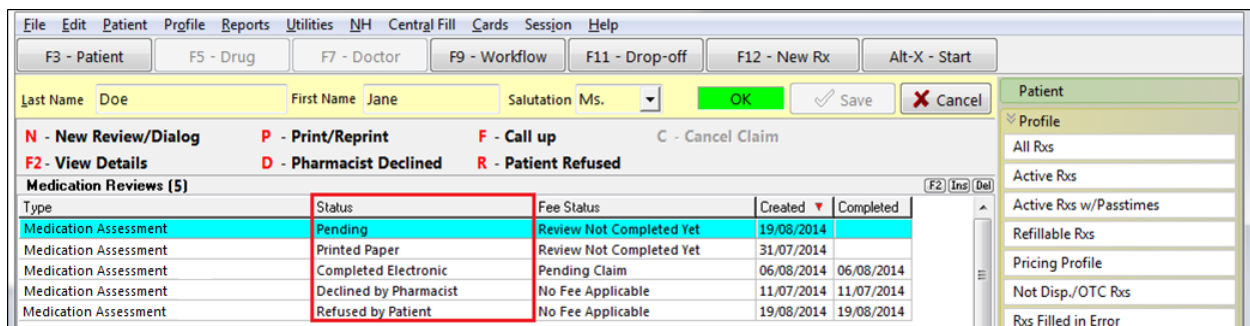
- If you select **Do not prompt until...** you will be prompted to specify the next time you want to be prompted for the patient’s Medication Review. Complete the form and click **OK**.
- If you select **Never Prompt for this patient** you will not receive any additional Medication Review prompts for 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  |
|-----------------------|------------------------|--------------------------|------------|------------|
| Medication Assessment | Pending                | Review Not Completed Yet | 19/08/2014 |            |
| Medication Assessment | Printed Paper          | Review Not Completed Yet | 31/07/2014 |            |
| Medication Assessment | Completed Electronic   | Pending Claim            | 06/08/2014 | 06/08/2014 |
| Medication Assessment | Declined by Pharmacist | No Fee Applicable        | 11/07/2014 | 11/07/2014 |
| Medication Assessment | Refused by Patient     | No Fee Applicable        | 19/08/2014 | 19/08/2014 |

#### Pending

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

#### Printed Paper

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

#### Completed

Reviews that have been printed and billed.

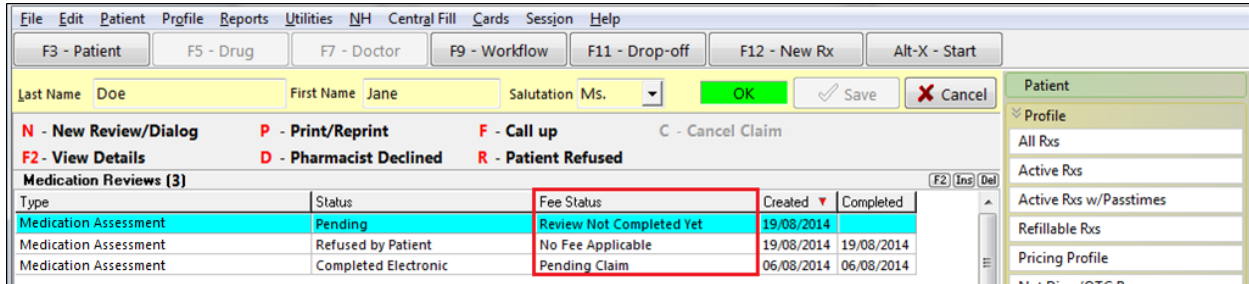
#### Declined by Pharmacist

Reviews that have been declined by the pharmacist.

#### Refused by Patient

Reviews that have been refused by the patient.

## Fee Statuses



| Type                  | Status               | Fee Status               | Created    | Completed  |
|-----------------------|----------------------|--------------------------|------------|------------|
| Medication Assessment | Pending              | Review Not Completed Yet | 19/08/2014 |            |
| Medication Assessment | Refused by Patient   | No Fee Applicable        | 19/08/2014 | 19/08/2014 |
| Medication Assessment | Completed Electronic | Pending Claim            | 06/08/2014 | 06/08/2014 |

### Review Not Completed Yet

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

### No Fee Applicable

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

### Pending Claim

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

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