

# New Brunswick Drug Information System (NBDIS)

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# New Brunswick Prescription Drug Information System (DIS)

The NB Drug Information System (DIS) is an electronic system that allows authorized health care providers such as community pharmacists, family physicians, optometrists, and dentists to access and manage individuals' medication information.

## Who to call?

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For any issues or errors, please contact Kroll Software Support 1-800-263-5876 (Option 1) for assistance who will determine if this is a Kroll issue or a New Brunswick Drug Information System (DIS) issue.

## Kroll User Accounts

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In compliance with New Brunswick DIS security standards, Kroll users must have a password associated with their user account. The enforcement of local passwords helps to keep patient information private and secure. If you do not currently have individual users and/or user passwords enabled, please contact the Kroll Support Desk.

## Kroll Passwords

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In compliance with the Drug Information System (DIS) standards, Kroll passwords must be complex and meet the following requirements:

- Must be at least 8 characters long;
- Must contain lower and upper case characters;
- Must contain a number;
- Must contain a special character (!@#\$%^&\*);
- Must be changed at least every 60 days;
- Must be different than the last 6 passwords;

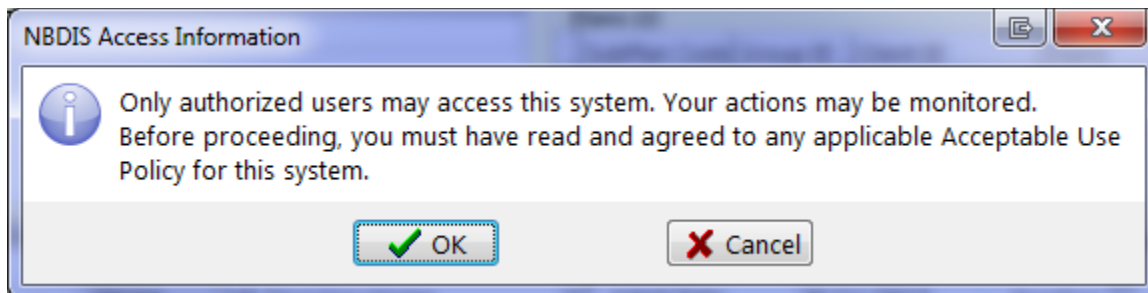
For security purposes, it is recommended that the new password not contain one or more parts of the user's name.

**HINT:** Users can incorporate a 2-digit number within their password and change the number sequentially each time it expires to facilitate the tracking of passwords that have been previously used.

## NBDIS Information Access

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For each user, on the first access of the day, the following warning will appear. The user must agree to, and acknowledge before they will be able to proceed. This message must be acknowledged at least once every 24 hours.



## Rules for Searching for a Patient on the Client Registry

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For the most part, searching for a patient in Kroll will function in the same manner as before New Brunswick DIS integration. That said, a few extra steps will be required to synchronize data between the local patient record and the New Brunswick DIS patient record. It is of great importance to patient safety that the correct local patient record is linked to the associated provincial Client Registry (CR) patient record because information will be updated to and from DIS via this link.

The ability to search the provincial registry to retrieve patient information is extremely valuable to ensure data quality and completeness. This search allows pharmacies to retrieve information not already recorded for a patient such as Health Card Number (HCN). In order to effectively search the Client Registry from within their system, the pharmacies must use one of the available searches below:

**Health Care Number (HCN)** – Should always be the first search performed.

- Allows you to search for a HCN from any jurisdiction in Canada.
- Allows searching for Department of Veterans Affairs (DVA), Department of National Defense (DND) clients.
- For New Brunswick Medicare, there is a potential to pull back more than one client.
- Mothers and babies share a HCN for a period of time and may both be pulled back on the search with the mother's HCN.
- Always review the name and date of birth (DOB) when you select a client from the search results.

**Enter Entire Name and Date of Birth (DOB)** – Enter the entire first and last name and DOB.

- It is preferable to use a 2 token name search (first and last name).
- Entering a two token name and DOB will return clients that match on name and also clients that match on DOB.
- The names returned are those that are phonetically the same as those you entered.
- A list of clients will return; the closest match phonetically and closest DOB match will be at the top of the list.

**Enter Entire Name and Phone Number OR Postal Code** – Enter the entire first and last name and phone number OR postal code.

- It is preferable to use a 2 token name search (first and last name).
- Entering a two token name and phone number or postal code will return clients that match on name and also clients that match on phone number or postal code.
- The names returned are those that are phonetically the same as those you entered
- A list of clients will return; the closest match phonetically and closest phone number or postal code match will be at the top of the list.

**Enter Entire Last Name and Date of Birth (DOB)**

- Entering one token name and the DOB will return clients that only match on name and DOB.
- The names returned are those that are phonetically the same as those you entered.
- A list of clients will return; the closest match phonetically and closest DOB match will be at the top of the list.

**Enter Entire Last Name and Phone Number OR Postal Code** – Enter the entire last name AND phone number OR postal code.

- Entering a one token name and Phone Number or Postal Code will return clients that match on name and also clients that match on Phone Number or Postal Code.
- The names returned are those that are phonetically the same as those you entered
- A list of clients will return; the closest match phonetically and closest phone number or postal code match will be at the top of the list.

**Phone number search** – This method allows you to search with only a phone number.

- Allows a one token search with phone number.
- Care must be taken to ensure that the client returned matches on other fields so you can be sure that it is the correct client.
- All clients with that phone number will be returned.

## Patient Search Scenarios

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For pharmacies integrated with New Brunswick DIS, there are four possible scenarios that can be encountered when searching for a patient:

- **Scenario 1 – Existing Local Patient also exists in Client Registry (Not Synchronized)**

Patient is in Kroll and exists in the Client Registry (CR). Note that all patients with NBPDP will be found in the Client Registry.

- **Scenario 2 – Existing Local Patient (Not Synchronized and Not Found in Client Registry)**

- **Scenario 3 – New Patient (Not found in Kroll but exists in Client Registry)**

Patient is not found in the Kroll system. This patient has an HCN number or has been entered in the Client Registry. Out-of-province patients may show up with alternate identification numbers.

- **Scenario 4 – New Patient (Not found in Kroll or Client Registry)**

Patient is not found in the Kroll System and has not been entered on the Client Registry. Adding the patient in Kroll will add them to the Client Registry.

## Scenario 1 – Existing Local Patient (Not Synchronized)

This patient exists in the Kroll system but is not yet synchronized with the Client Registry (CR).

### Synchronize by Health Care Number

(The local Kroll patient already has a health care number recorded on their file.)

1. Search for the patient using the **F3 - Patient** search. If provided, use the HCN to search. Select the patient.

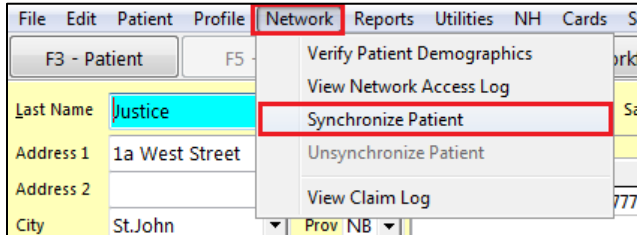
Last,First; Code; Phone; or Bill #		<input checked="" type="checkbox"/> Edit	<input type="button" value="Ins Insert"/>	Searching By	<b>Billing Number (Adv)</b>			
<input type="text" value="#919660753"/>		<input checked="" type="checkbox"/> Cancel	<input type="button" value="Copy Pat"/>	<input type="checkbox"/> Advanced	<b>1 Record Found</b>			
#	Last Name	First Name	Address	City	Age	Birth	Phone	Plan
1	Justice	Jack	1a West Street	St.John	35	11/12/1980	(777) 777-7777 Home	NBPDPA

2. The patient card opens. The **DIS Data Status** field will show a yellow 'Unsynchronized' indicator.

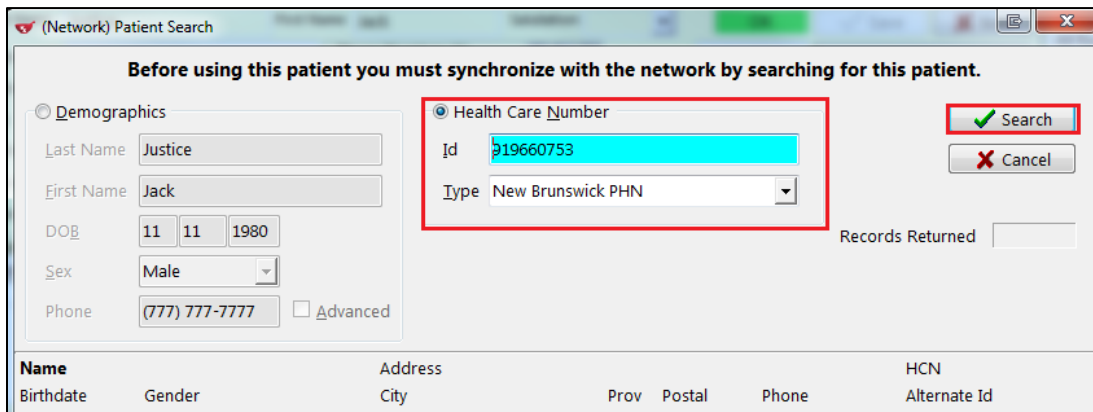
F3 - Patient		F5 - Drug	F7 - Doctor	F9 - Workflow	F10 - Pickup	F11 - Drop-off	F12 - New Rx
Last Name <b>Justice</b>		First Name <b>Jack</b>		Salutation	OK		Save Scan
Address 1 <b>1a West Street</b>		Phone Numbers (1)		Birthdate <b>11/11/1980</b>	No image available		
Address 2		Description Phone		Age <b>35 years</b>			
City <b>St.John</b> Prov <b>NB</b>		Home <b>(777) 777-7777</b>		Gender <b>Male</b>			
Postal <b>N1N 1B1</b> Country <b>Canada</b>				Language <b>English</b>			
Email		Family Doctor		Height	Load Delete		
Quick Code				Weight	HCN <b>NBPDPA</b> 919660753		
Comments (0)				Plans (2)			
Topic		Comment		SubPlan Code Group ID Client ID Expiry			
				1 NBPDPA A 919660753			
Allergies (0)		Add Drug		General Family Nursing Home Communications Other			
Medical Conditions (0)		F2 Ins Del		Patient			
Groups (0)		F2 Ins Del		<input checked="" type="checkbox"/> Active Patient Type <b>Human</b> Deceased On Prescriptions Delivery Type <b>Default (Pickup)</b> Delivery Route Price Group <b>&lt;None&gt;</b> Drug line 1 <b>Default (Brand)</b> 2 <b>Default (Gener)</b> Double Count <b>Not Required</b> <input type="checkbox"/> Snap Caps Requested <input type="checkbox"/> Snap Caps Documented <input type="checkbox"/> No Kroll Care <input type="checkbox"/> Compliance Calendar on Label			
				Consent Privacy <b>Unknown</b> Unit Dose Type <b>&lt;None&gt;</b> Cycle <b>&lt;None&gt;</b> Price Group <b>&lt;Default&gt; (&lt;None&gt;)</b> Rx Totals Rx Count <b>16</b> Dollar value <b>\$307.24</b> <input type="button" value="Reset"/> date <b>DIS Data Status</b> <b>Unsynchronized</b> ID <b>16</b>			



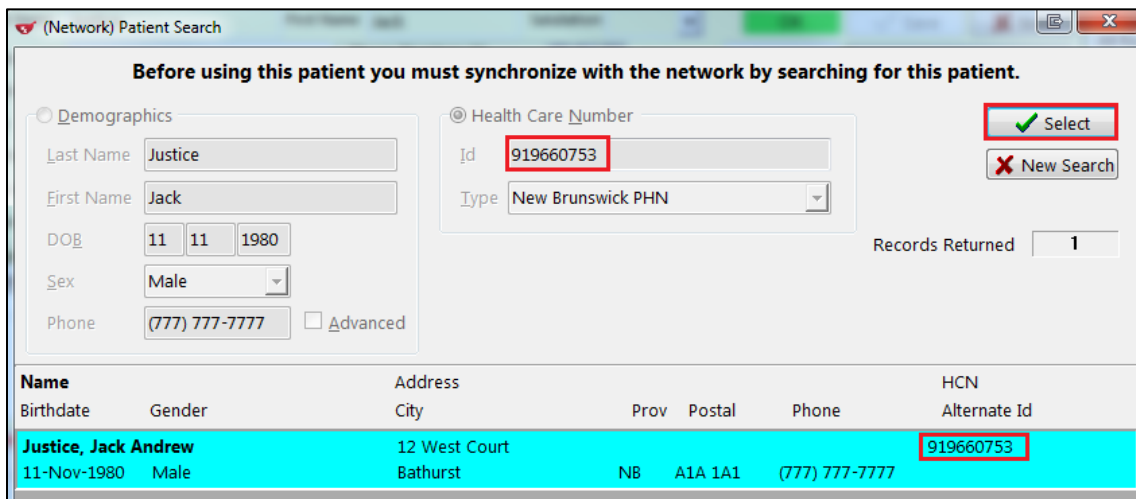
- From the patient card, go to **Network > Synchronize Patient** and enter your login credentials.



- Patient information from the local Kroll record is automatically copied into the Network Patient Search. The primary search will always be based on the Health Care Number when available. Click **Search**.

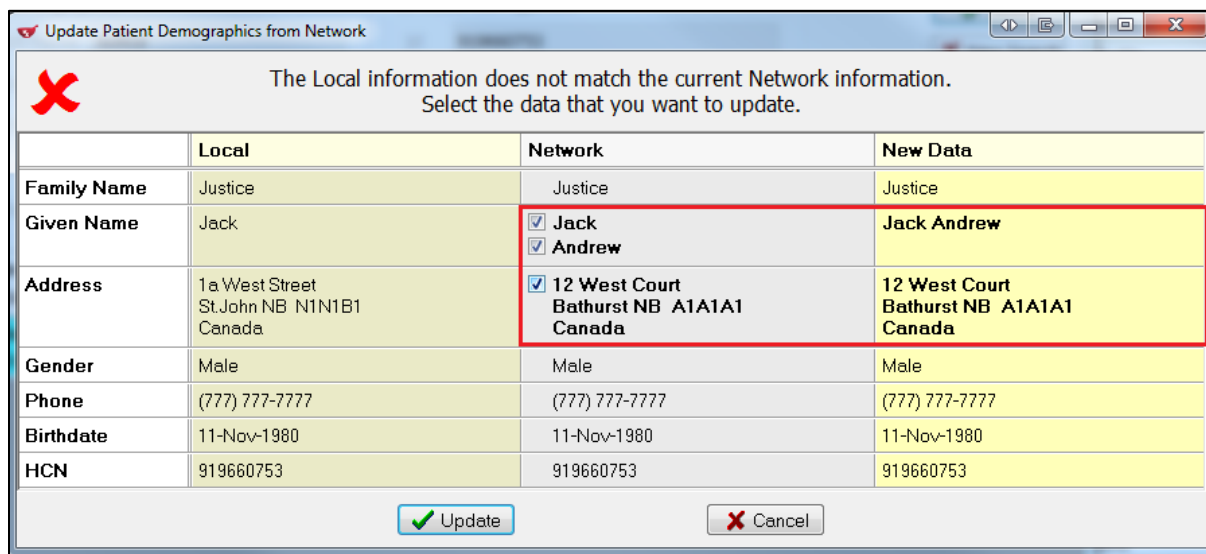


- An exact match on the HCN is found. Click **Select**.



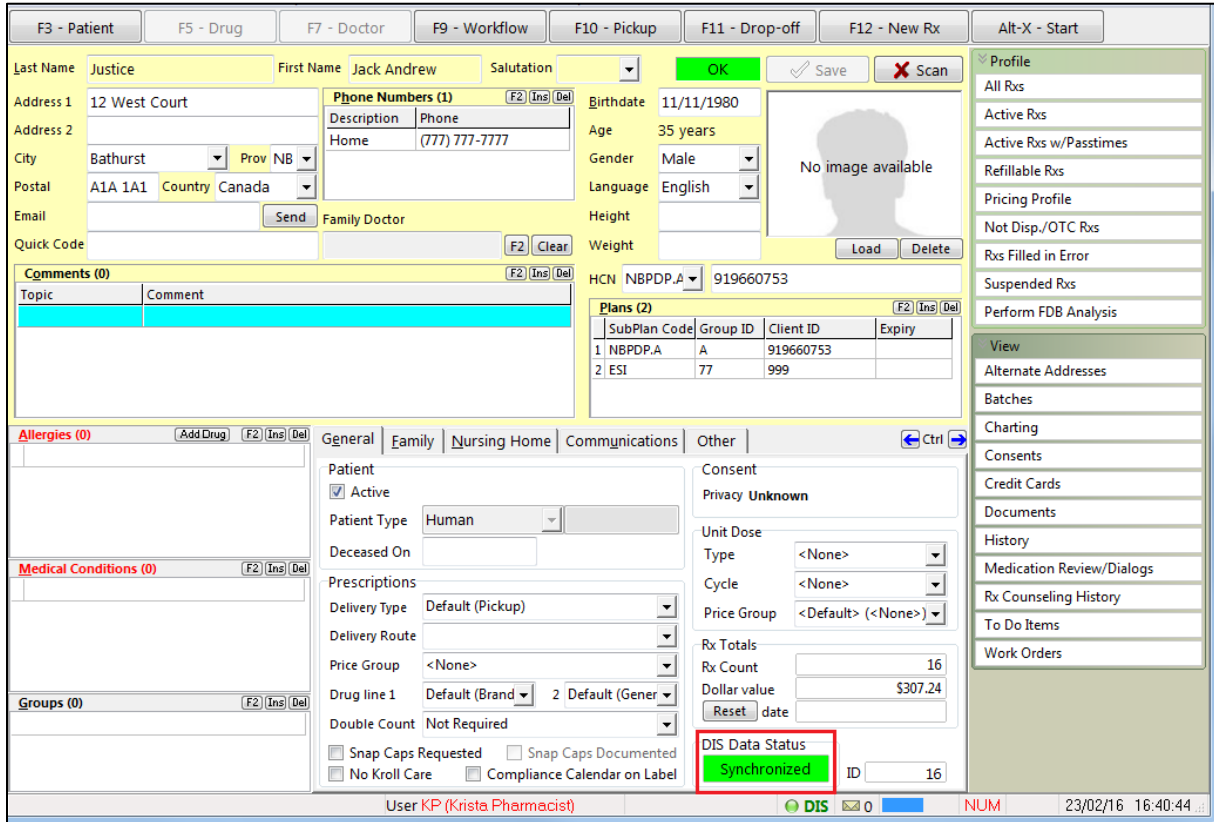
6. The **Update Patient Demographics from Network** window will appear. This screen allows you to compare information between the local and network record. The first column displays current local patient information; the second column displays network (Client Registry) patient information; the last column displays the resulting information that will be updated on the local Kroll patient record. Any mismatched fields will be prefixed with a checkbox. Placing a checkmark in any of those boxes will be reflected in the New Data column.

When you are finished comparing and optionally selecting the fields to update, click **Update**.



	Local	Network	New Data
Family Name	Justice	Justice	Justice
Given Name	Jack	<input checked="" type="checkbox"/> Jack <input checked="" type="checkbox"/> Andrew	Jack Andrew
Address	1a West Street St.John NB N1N1B1 Canada	<input checked="" type="checkbox"/> 12 West Court Bathurst NB A1A1A1 Canada	12 West Court Bathurst NB A1A1A1 Canada
Gender	Male	Male	Male
Phone	(777) 777-7777	(777) 777-7777	(777) 777-7777
Birthdate	11-Nov-1980	11-Nov-1980	11-Nov-1980
HCN	919660753	919660753	919660753

- The patient is now synchronized with the DIS. This is indicated in the lower right hand corner under **DIS Data Status** with a green **'Synchronized'** indicator.



F3 - Patient    F5 - Drug    F7 - Doctor    F9 - Workflow    F10 - Pickup    F11 - Drop-off    F12 - New Rx    Alt-X - Start

Last Name: Justice    First Name: Jack Andrew    Salutation:    OK    Save    X Scan

Address 1: 12 West Court    Phone Numbers (1): (777) 777-7777    Birthdate: 11/11/1980    Age: 35 years    Gender: Male    Language: English

Address 2:    City: Bathurst    Prov: NB    Postal: A1A 1A1    Country: Canada    Email:    Family Doctor:    HCN: NBPDP.A    919660753

Comments (0)    Plans (2):

SubPlan Code	Group ID	Client ID	Expiry
1 NBPDP.A	A	919660753	
2 EST	77	999	

Allergies (0)    Medical Conditions (0)    Groups (0)

General    Family    Nursing Home    Communications    Other

Patient:  Active    Patient Type: Human    Deceased On:    Consent: Privacy Unknown

Prescriptions: Delivery Type: Default (Pickup)    Delivery Route:    Price Group: <None>    Drug line 1: Default (Brand)    2 Default (Gener)    Double Count: Not Required

Unit Dose: Type: <None>    Cycle: <None>    Price Group: <Default> (<None>)    Rx Totals: Rx Count: 16    Dollar value: \$307.24    Reset date

Snap Caps Requested    Snap Caps Documented    No Kroll Care    Compliance Calendar on Label

**DIS Data Status: Synchronized**    ID: 16

User KP (Krista Pharmacist)    DIS    NUM    23/02/16 16:40:44

## Synchronize by Demographics

(The local Kroll patient does not have a health care number on file.)

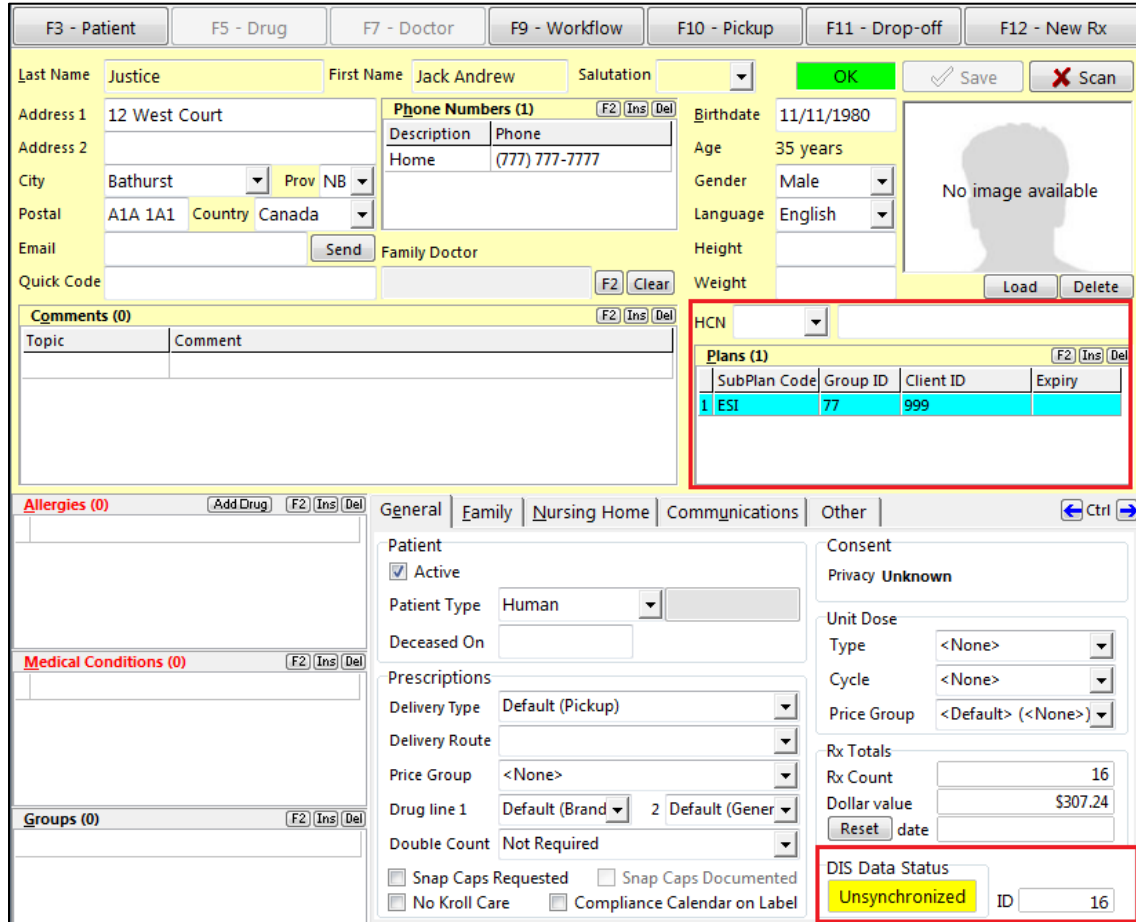
- When a patient doesn't have a Health Care number, use the patient name to search. Select the patient.

Last,First; Code; Phone; or Bill #    Edit    Ins Insert    Searching By    Last Name, First Name (A)

justice, jack    X Cancel    Copy Pat    Advanced    1 Record Found

#	Last Name	First Name	Address	City	Age	Birth	Phone	Plan
1	Justice	Jack	1a West Street	StJohn	35	11/11/1980	(777) 777-7777 Home	NBPDP.A

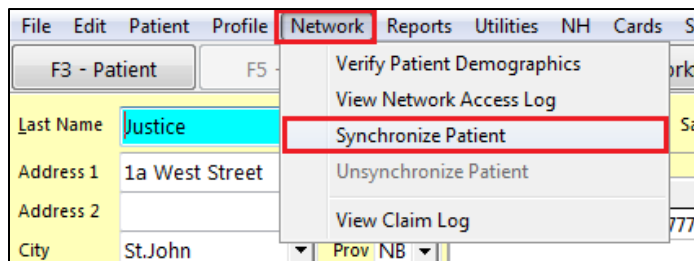
- The patient card opens. The **DIS Data Status** field will show a yellow 'Unsynchronized' indicator.



The screenshot shows a patient card for Jack Andrew Justice. The 'DIS Data Status' field is highlighted in yellow and contains the text 'Unsynchronized'. Other fields include Last Name (Justice), First Name (Jack Andrew), Birthdate (11/11/1980), Age (35 years), Gender (Male), and Language (English). The 'Plans' table shows one plan with SubPlan Code 'ESI', Group ID '77', and Client ID '999'. The 'DIS Data Status' field also shows an ID of '16'.

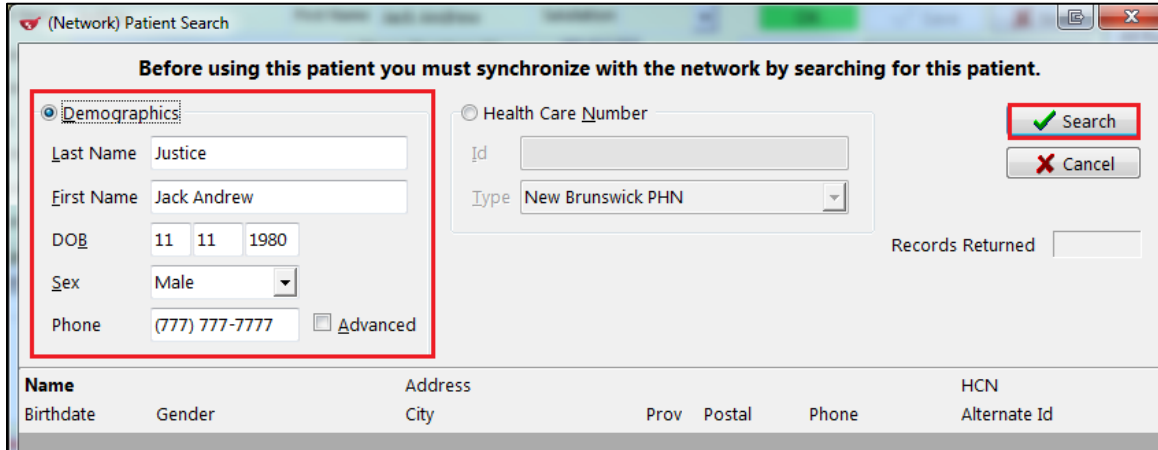
SubPlan Code	Group ID	Client ID	Expiry
ESI	77	999	

- From the patient card, go to **Network > Synchronize Patient** and enter your login credentials.



The screenshot shows the 'Network' menu open, with 'Synchronize Patient' highlighted. The menu options are: Verify Patient Demographics, View Network Access Log, Synchronize Patient, Unsynchronize Patient, and View Claim Log. The patient card background shows Last Name 'Justice' and City 'St. John'.

- When the Health Care Number is not available, the Demographics search will be enabled. Click **Search**.



Before using this patient you must synchronize with the network by searching for this patient.

Demographics

Last Name: Justice  
 First Name: Jack Andrew  
 DOB: 11 11 1980  
 Sex: Male  
 Phone: (777) 777-7777  Advanced

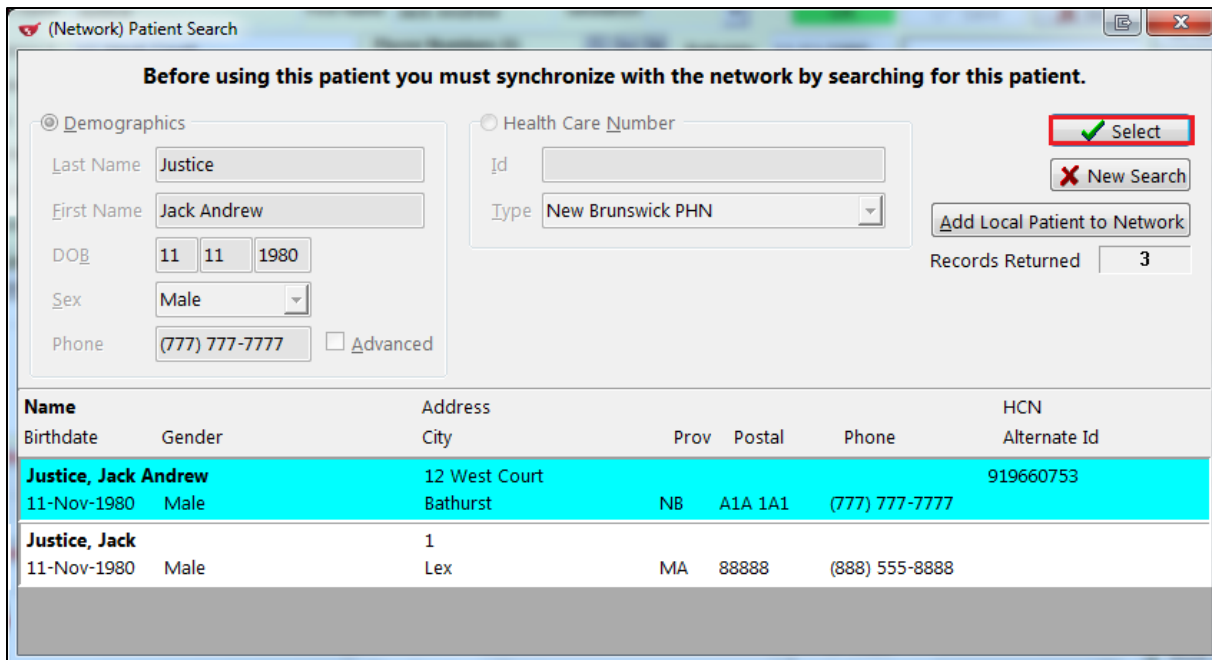
Health Care Number

Id:   
 Type: New Brunswick PHN

Records Returned:

Name	Birthdate	Gender	Address	City	Prov	Postal	Phone	HCN	Alternate Id
------	-----------	--------	---------	------	------	--------	-------	-----	--------------

- A list of patients closely matching the demographic criteria is displayed. Click **Select** on the patient to synchronize to the local record.



Before using this patient you must synchronize with the network by searching for this patient.

Demographics

Last Name: Justice  
 First Name: Jack Andrew  
 DOB: 11 11 1980  
 Sex: Male  
 Phone: (777) 777-7777  Advanced


Health Care Number

Id:   
 Type: New Brunswick PHN

Records Returned: 3

Name	Birthdate	Gender	Address	City	Prov	Postal	Phone	HCN	Alternate Id
<b>Justice, Jack Andrew</b>	11-Nov-1980	Male	12 West Court	Bathurst	NB	A1A 1A1	(777) 777-7777	919660753	
Justice, Jack	11-Nov-1980	Male	1	Lex	MA	88888	(888) 555-8888		

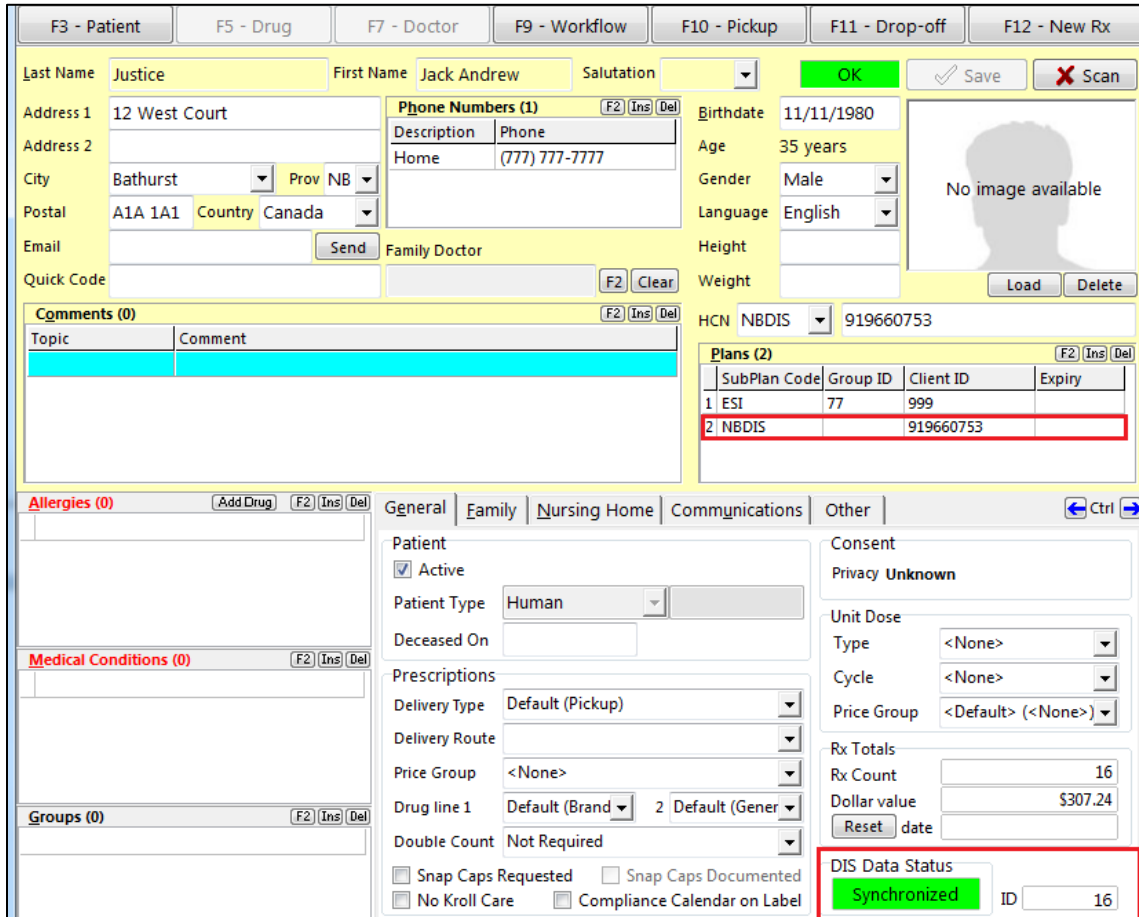
- The **Update Patient Demographics from Network** window opens. This screen allows you to compare information between the Local and Network record. Any mismatched fields will be prefixed with a checkbox. Placing a checkmark in any of those boxes will be reflected in the New Data column that shows you what your patient record will look like once you update. When finished comparing, click **Update**.



The Local information does not match the current Network information.  
Select the data that you want to update.

	Local	Network	New Data
<b>Family Name</b>	Justice	Justice	Justice
<b>Given Name</b>	Jack Andrew	<input type="checkbox"/> Jack <input type="checkbox"/> Andrew	Jack Andrew
<b>Address</b>	12 West Court Bathurst NB A1A1A1 Canada	12 West Court Bathurst NB A1A1A1 Canada	12 West Court Bathurst NB A1A1A1 Canada
<b>Gender</b>	Male	Male	Male
<b>Phone</b>	(777) 777-7777	(777) 777-7777	(777) 777-7777
<b>Birthdate</b>	11-Nov-1980	11-Nov-1980	11-Nov-1980
<b>HCN</b>		<input checked="" type="checkbox"/> 919660753	919660753

- The patient is now synchronized with the DIS. This is indicated in the lower right hand corner under **DIS Data Status** with a green '**Synchronized**' indicator. Note that the **NBDIS** plan is automatically inserted.



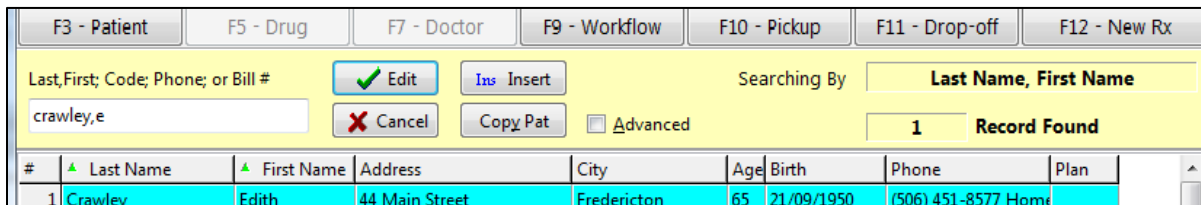
The screenshot shows a patient record for Jack Andrew Justice. The 'DIS Data Status' field at the bottom right is highlighted with a red box and shows 'Synchronized' in green text. The 'Plans (2)' table below it shows:

SubPlan Code	Group ID	Client ID	Expiry
1 ESI	77	999	
2 NBDIS		919660753	

The 'Patient' section includes fields for Active status, Patient Type (Human), and various insurance and delivery options. The 'Consent' section shows Privacy as 'Unknown'.

## Scenario 2- Existing Local Patient (Not Synchronized and Not Found in Client Registry)

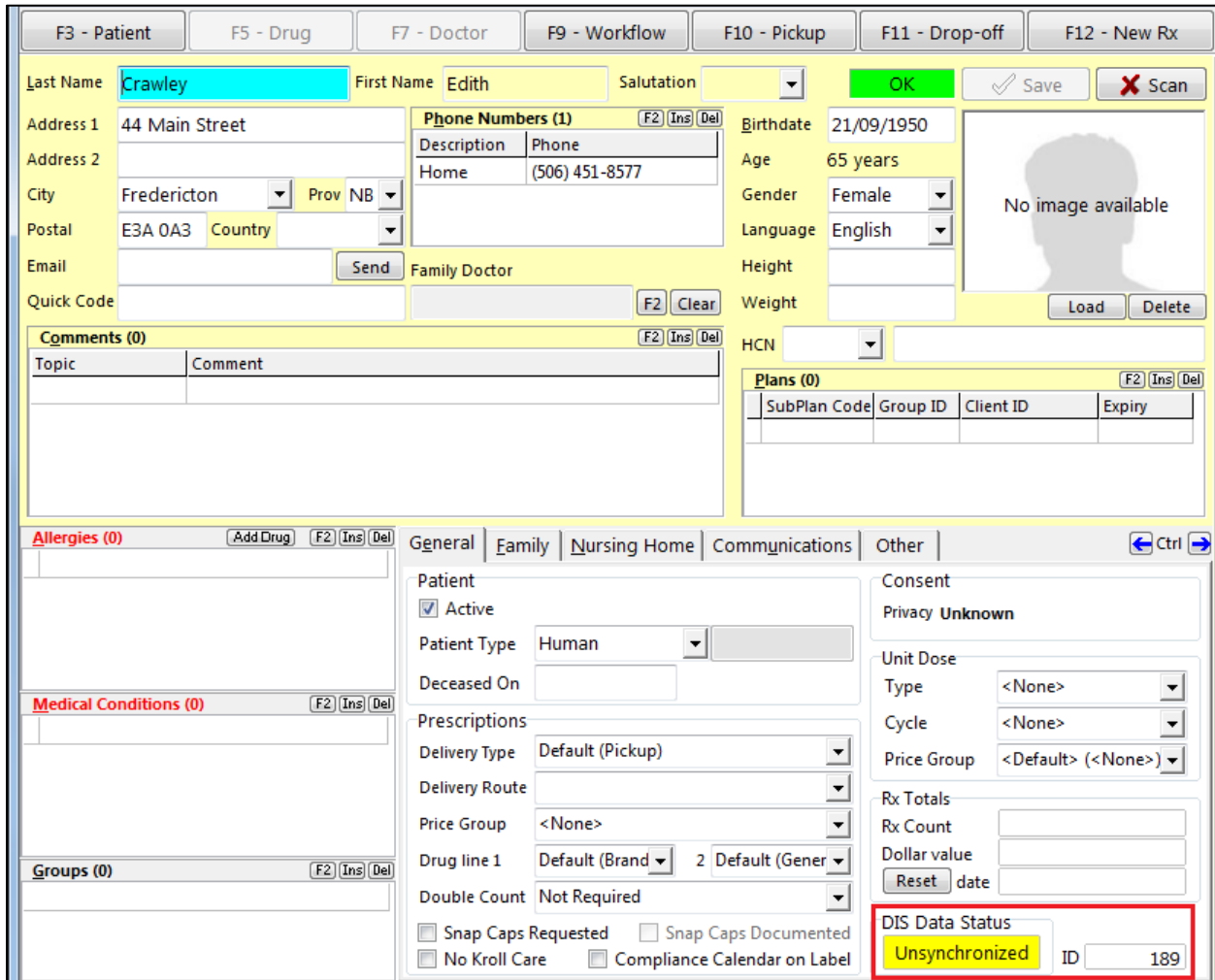
- Search for the patient using the **F3 - Patient** search. Select the patient. This patient exists locally in your Kroll database, but has not been synchronized with a Network patient record.



The screenshot shows the search results for a patient. The search criteria are 'Last Name, First Name' and 'crawley,e'. One record is found:

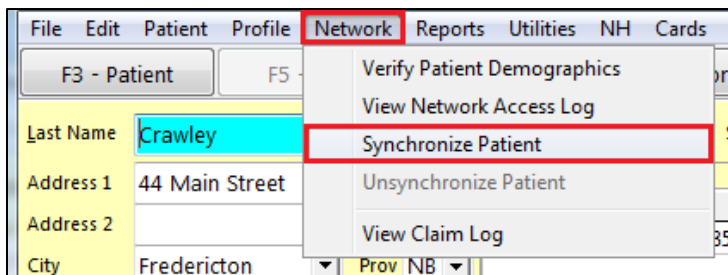
#	Last Name	First Name	Address	City	Age	Birth	Phone	Plan
1	Crawley	Edith	44 Main Street	Fredericton	65	21/09/1950	(506) 451-8577 Home	

- The patient card opens. The **DIS Data Status** field will show a yellow 'Unsynchronized' indicator.



The screenshot shows a patient card for Edith Crawley. The 'DIS Data Status' field is highlighted in yellow and displays 'Unsynchronized' with an ID of 189. Other fields include Last Name: Crawley, First Name: Edith, Birthdate: 21/09/1950, Age: 65 years, Gender: Female, and Address: 44 Main Street, Fredericton, NB.

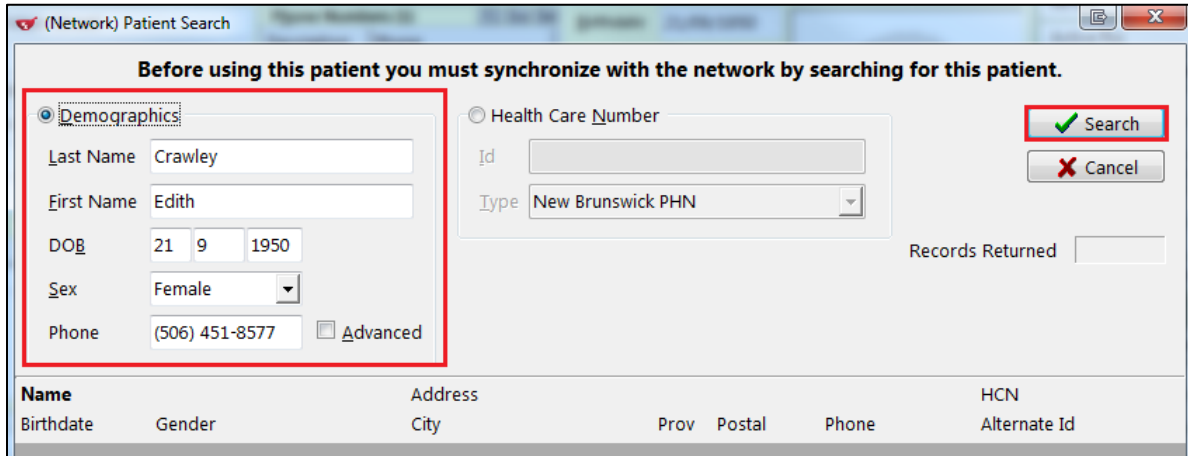
- From the patient card, go to **Network > Synchronize Patient** and enter your login credentials.



The screenshot shows the 'Network' menu open, with 'Synchronize Patient' highlighted. Other menu items include 'Verify Patient Demographics', 'View Network Access Log', 'Unsynchronize Patient', and 'View Claim Log'.



4. Patient information from the local patient record will automatically be copied into **Demographics** on the **(Network) Patient Search** window and used as search criteria. Click **Search** or press **Enter** on the keyboard to search the CR for a matching patient.



**(Network) Patient Search**

Before using this patient you must synchronize with the network by searching for this patient.

Demographics

Last Name:

First Name:

DOB:

Sex:

Phone:   Advanced

Health Care Number

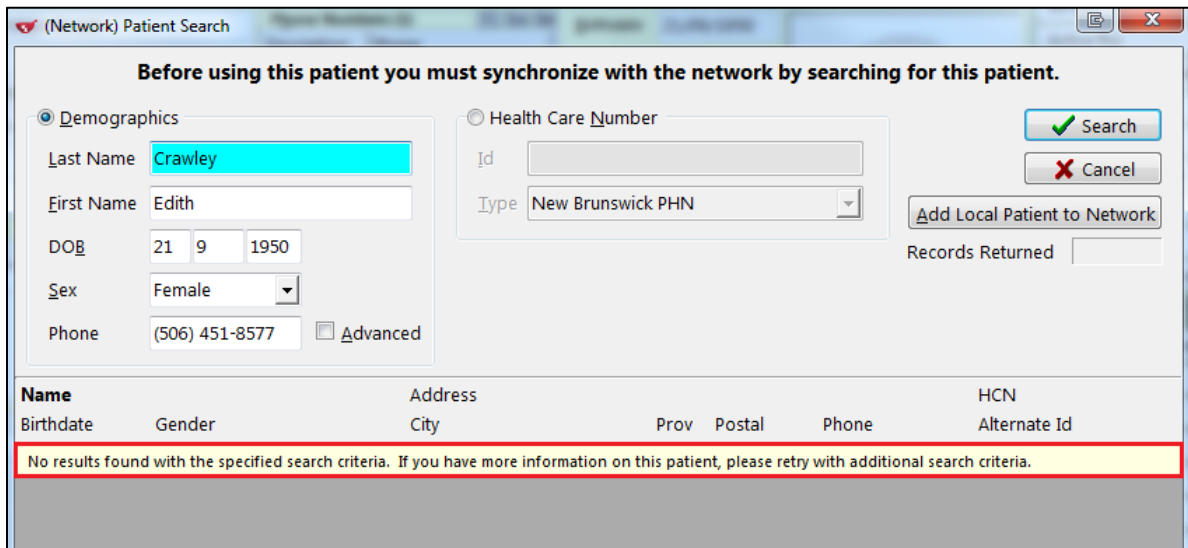
Id:

Type:

Records Returned:

Name	Address	HCN				
Birthdate	Gender	City	Prov	Postal	Phone	Alternate Id

If no records are returned for the search criteria entered, you will be shown a message indicating 'No results found with the specified search criteria'. If you have more information on this patient, please retry with additional search criteria.



**(Network) Patient Search**

Before using this patient you must synchronize with the network by searching for this patient.

Demographics

Last Name:

First Name:

DOB:

Sex:

Phone:   Advanced

Health Care Number

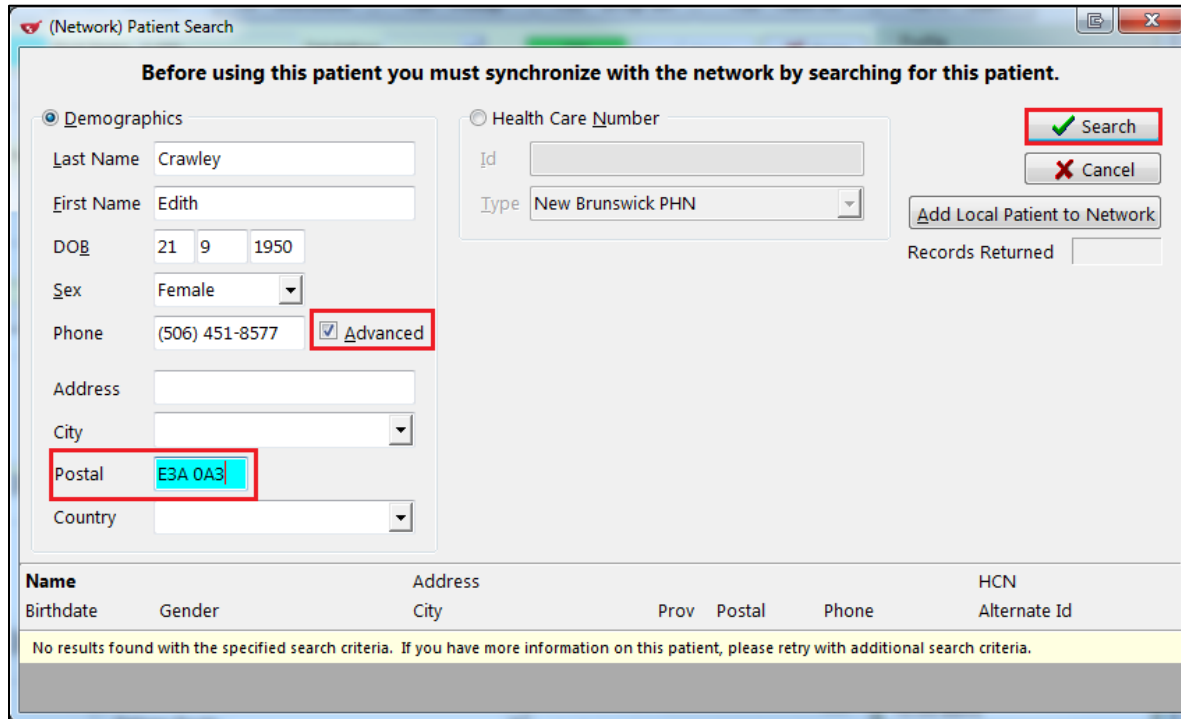
Id:

Type:

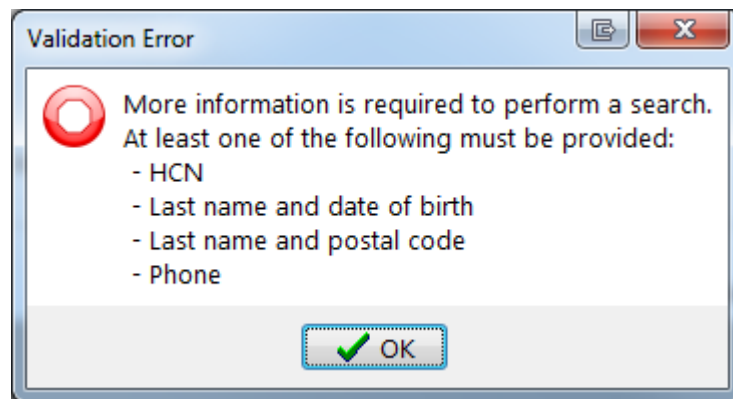
Records Returned:

Name	Address	HCN				
Birthdate	Gender	City	Prov	Postal	Phone	Alternate Id
No results found with the specified search criteria. If you have more information on this patient, please retry with additional search criteria.						

- If you have been provided with additional information for this patient, then an advanced search should be performed.



**NOTE:** When doing a demographics search, minimum criteria must include the last name and date of birth, last name and postal code, or phone number. If you attempt to search without the minimum criteria, a validation error will occur.



6. If the patient is still not found, select **Add Local Patient to Network**.

(Network) Patient Search

**Before using this patient you must synchronize with the network by searching for this patient.**

Demographics

Last Name:

First Name:

DOB:

Sex:

Phone:   Advanced

Address:

City:

Postal:

Country:

Health Care Number

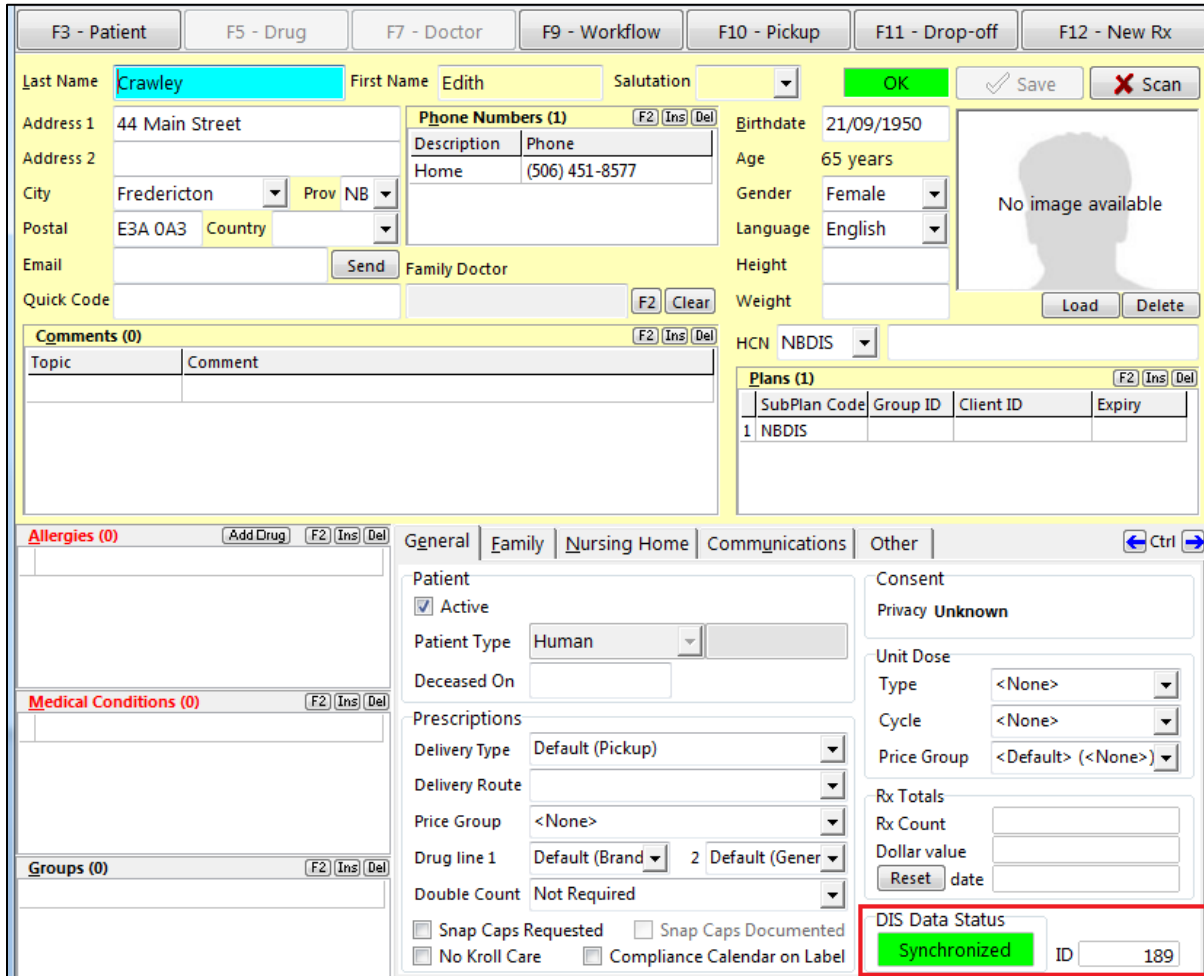
Id:

Type:

Records Returned:

Name		Address			HCN	
Birthdate	Gender	City	Prov	Postal	Phone	Alternate Id
No results found with the specified search criteria. If you have more information on this patient, please retry with additional search criteria.						

- The patient is now added to the Network as indicated by the **DIS Data Status** of **'Synchronized'**. Note that the **NBDIS** plan is automatically inserted but does not contain a client ID.



**F3 - Patient** | F5 - Drug | F7 - Doctor | F9 - Workflow | F10 - Pickup | F11 - Drop-off | F12 - New Rx

Last Name: **Crawley** | First Name: Edith | Salutation: [Dropdown] | OK | Save | Scan

Address 1: 44 Main Street | Address 2: [Empty] | City: Fredericton | Postal: E3A 0A3 | Country: [Dropdown]

**Phone Numbers (1)**

Description	Phone
Home	(506) 451-8577

Birthdate: 21/09/1950 | Age: 65 years | Gender: Female | Language: English

Family Doctor: [Empty] | HCN: NBDIS

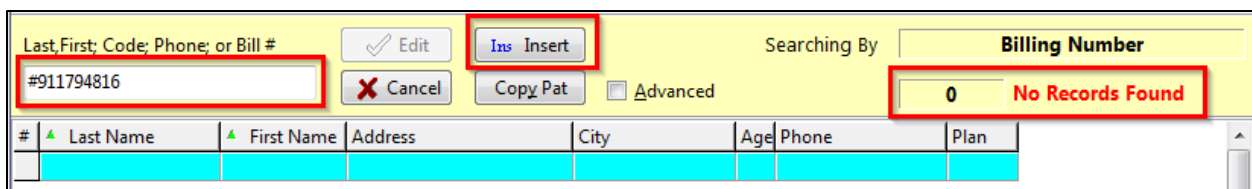
**Plans (1)**

SubPlan Code	Group ID	Client ID	Expiry
1	NBDIS		

**DIS Data Status**: Synchronized | ID: 189

### Scenario 3 – New Patient (Not Found in Kroll but Exists in Client Registry)

- Search for the patient using the **F3-Patient Search**. If provided, use the patient’s HCN as this is the preferred method should you need to search the network. Verify the patient does not exist on the local system and click **Insert**.

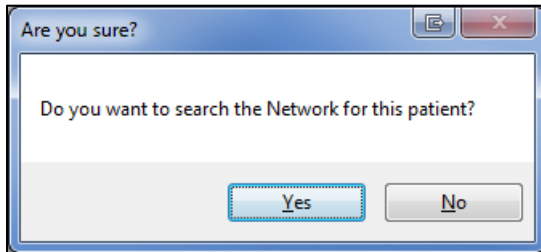


Last, First, Code, Phone, or Bill #: #911794816 | Edit | **Ins Insert** | Searching By: Billing Number

Cancel | Copy Pat | Advanced | 0 No Records Found

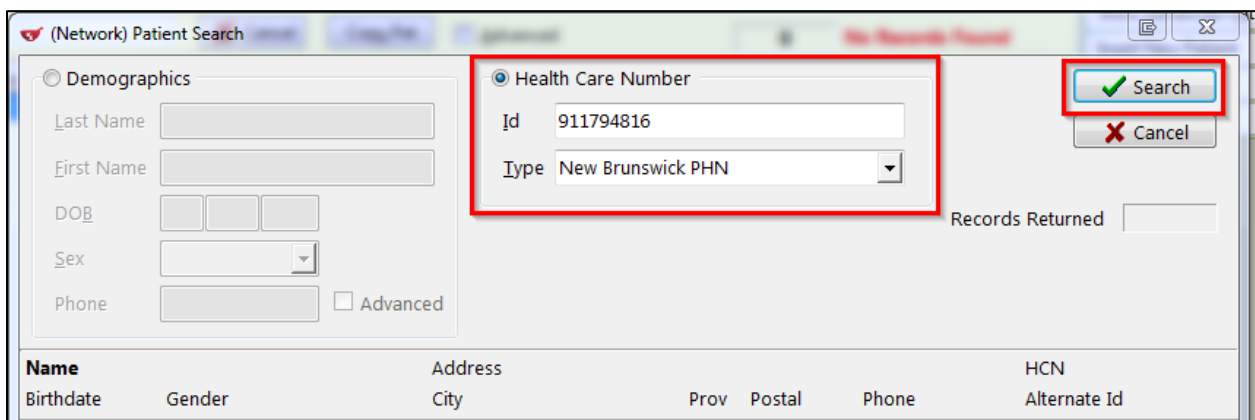
#	Last Name	First Name	Address	City	Age	Phone	Plan

- To search the Client Registry for a matching patient, answer **Yes** when asked ‘Do you want to search the Network for this patient?’

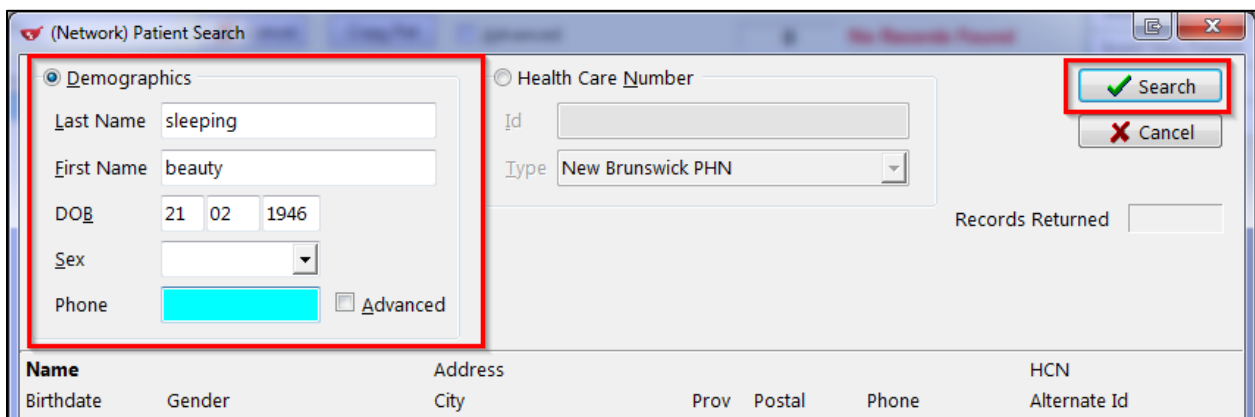


**NOTE:** If you answer **No**, you will be brought directly to the **F3 - Patient** card to enter the patient’s information manually.

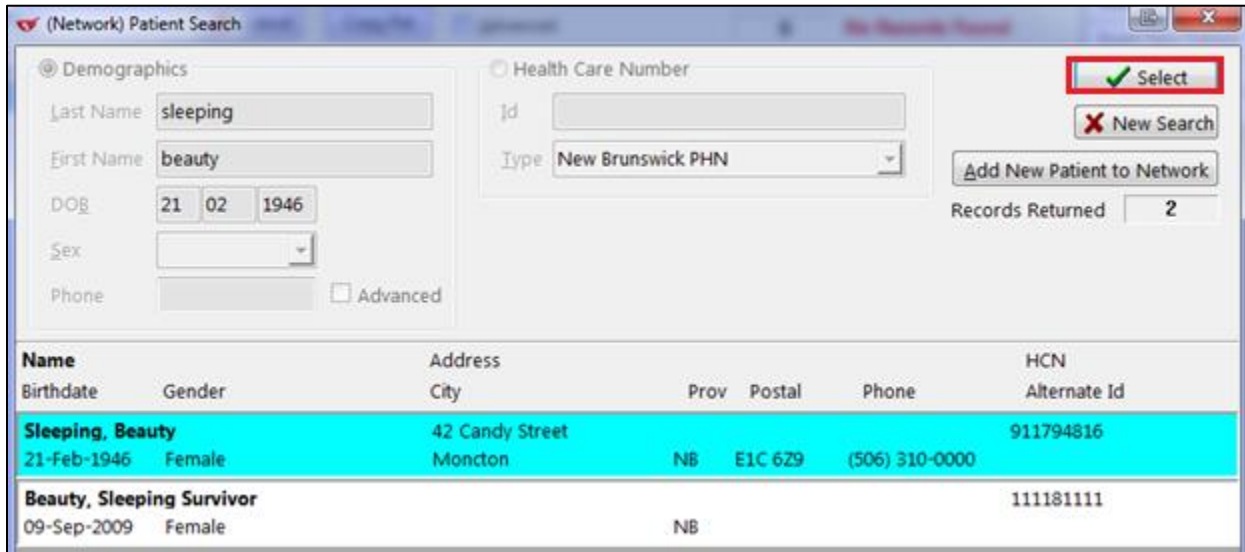
- Input all available patient information into the **(Network) Patient Search** screen and click **Search** or press **Enter** on the keyboard.



**NOTE:** When the health care number is not available, the last name and date of birth, last name and postal code or phone number must be provided in order to initiate the search.

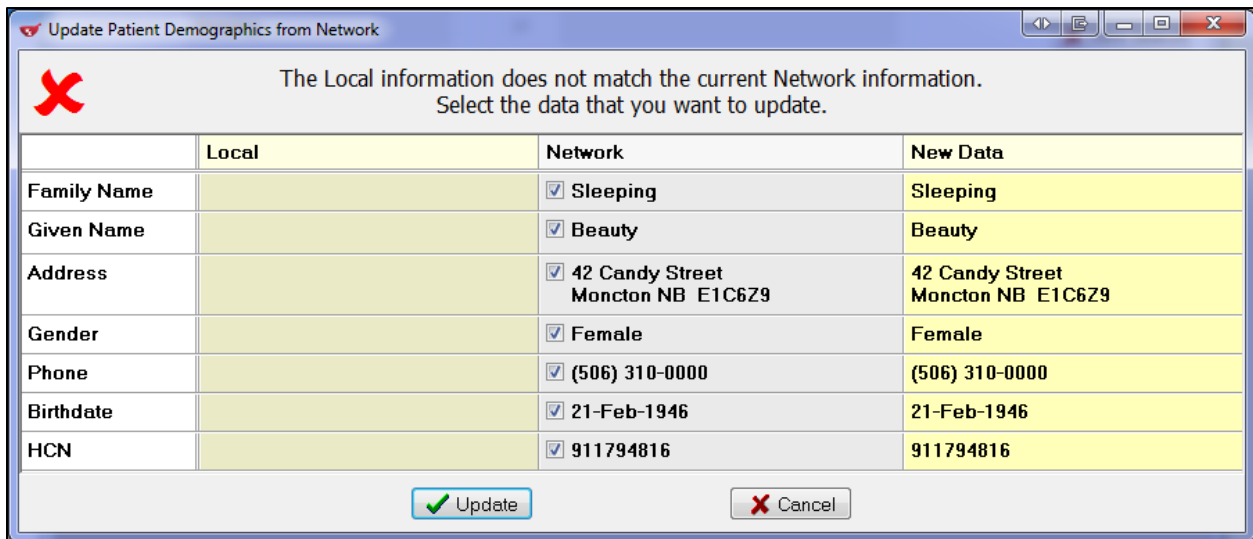


- Select the matching patient from the CR results by highlighting the entry and clicking **Select** or by pressing **Enter** on the keyboard.



Name	Address	HCN
Birthdate	City	Alternate Id
<b>Sleeping, Beauty</b>	42 Candy Street Moncton	911794816
21-Feb-1946 Female	NB E1C 6Z9 (506) 310-0000	
<b>Beauty, Sleeping Survivor</b>		111181111
09-Sep-2009 Female	NB	

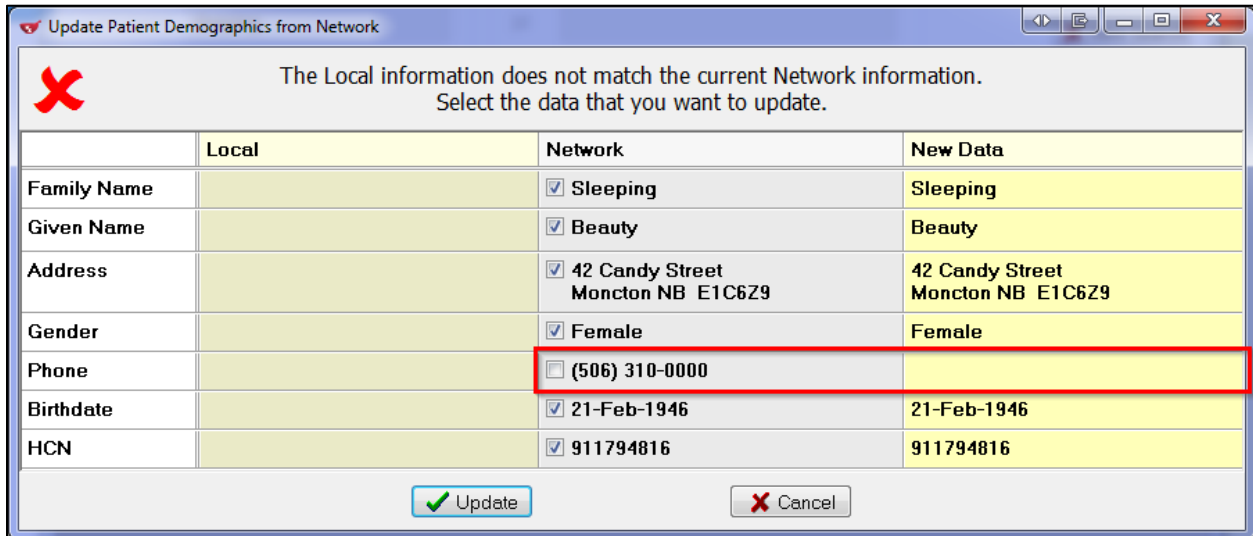
- The **Patient Update** screen will appear allowing you to select the information they want to use from the Client Registry to create the local Kroll patient record.



The Local information does not match the current Network information.  
Select the data that you want to update.

	Local	Network	New Data
Family Name		<input checked="" type="checkbox"/> Sleeping	Sleeping
Given Name		<input checked="" type="checkbox"/> Beauty	Beauty
Address		<input checked="" type="checkbox"/> 42 Candy Street Moncton NB E1C6Z9	42 Candy Street Moncton NB E1C6Z9
Gender		<input checked="" type="checkbox"/> Female	Female
Phone		<input checked="" type="checkbox"/> (506) 310-0000	(506) 310-0000
Birthdate		<input checked="" type="checkbox"/> 21-Feb-1946	21-Feb-1946
HCN		<input checked="" type="checkbox"/> 911794816	911794816

- By default, all of the **Network** columns will be flagged for updating. If you do not want to update the local data with the Network data, uncheck the flag next to the applicable field.

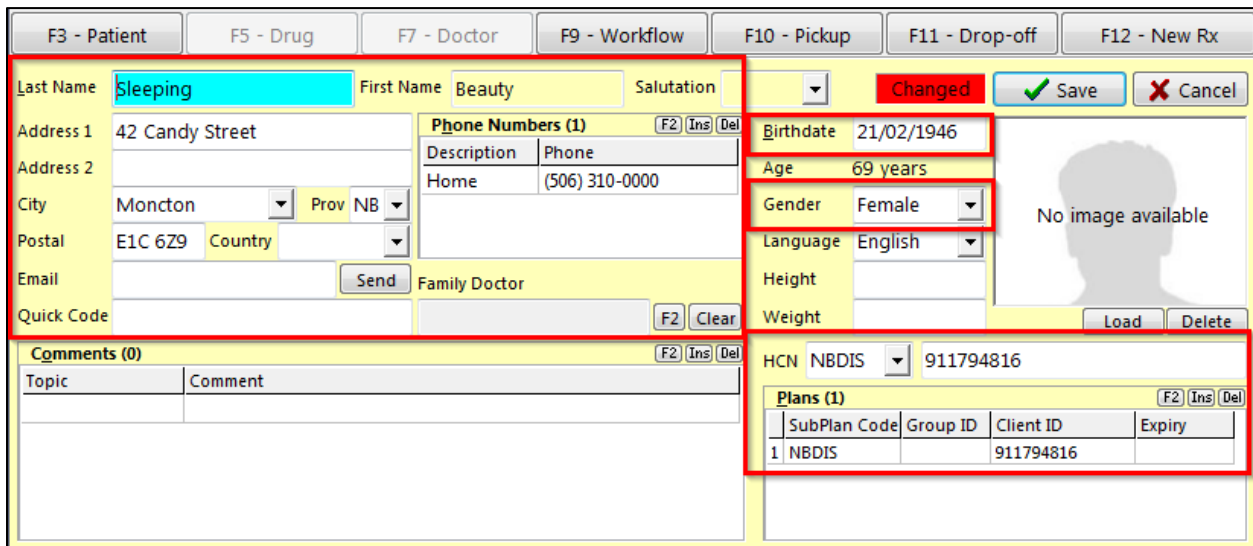


The Local information does not match the current Network information. Select the data that you want to update.

	Local	Network	New Data
Family Name		<input checked="" type="checkbox"/> Sleeping	Sleeping
Given Name		<input checked="" type="checkbox"/> Beauty	Beauty
Address		<input checked="" type="checkbox"/> 42 Candy Street Moncton NB E1C6Z9	42 Candy Street Moncton NB E1C6Z9
Gender		<input checked="" type="checkbox"/> Female	Female
Phone		<input type="checkbox"/> (506) 310-0000	
Birthdate		<input checked="" type="checkbox"/> 21-Feb-1946	21-Feb-1946
HCN		<input checked="" type="checkbox"/> 911794816	911794816

Buttons:

- Once you have finished selecting the Network data that needs to be updated into the local patient record, click **Update** or press **Enter** on the keyboard. Selected patient information will be populated into the local Krroll record.



Navigation: F3 - Patient | F5 - Drug | F7 - Doctor | F9 - Workflow | F10 - Pickup | F11 - Drop-off | F12 - New Rx

Last Name: Sleeping | First Name: Beauty | Salutation: [Dropdown] | Changed |  |

Address 1: 42 Candy Street | Address 2: [Empty] | City: Moncton | Prov: NB | Postal: E1C 6Z9 | Country: [Dropdown]

Phone Numbers (1):  

Description	Phone
Home	(506) 310-0000

Birthdate: 21/02/1946 | Age: 69 years | Gender: Female | Language: English

HCN: NBDIS | 911794816

Plans (1):  

SubPlan Code	Group ID	Client ID	Expiry
1	NBDIS	911794816	

- Input other pertinent patient information (e.g., snap cap preference, additional plan information, height, weight, etc.) and click **Save** or press **Enter** on the keyboard.

F3 - Patient
F5 - Drug
F7 - Doctor
F9 - Workflow
F10 - Pickup
F11 - Drop-off
F12 - New Rx

Last Name  First Name  Salutation

Address 1

Address 2

City  Prov

Postal  Country

Email   Family Doctor

Quick Code

**Phone Numbers (1)**

Description	Phone
Home	(506) 310-0000

Birthdate

Age

Gender

Language

Height

Weight

HCN

**Comments (0)**

Topic	Comment

**Plans (1)**

SubPlan Code	Group ID	Client ID	Expiry
1	NBDIS	911794816	



- Once the patient card is saved, the **DIS Data Status** window will display a green **'Synchronized'** indicator.

F3 - Patient
F5 - Drug
F7 - Doctor
F9 - Workflow
F10 - Pickup
F11 - Drop-off
F12 - New Rx

Last Name **Sleeping**
First Name **Beauty**
Salutation

OK
Save
Scan

Address 1 42 Candy Street

Address 2

City **Moncton** Prov **NB**

Postal **E1C 6Z9** Country

Email

Quick Code

**Phone Numbers (1)**

Description	Phone
Home	(506) 310-0000

Birthdate **21/02/1946**

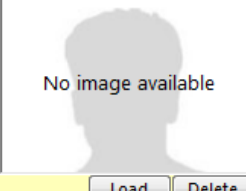
Age **69 years**

Gender **Female**

Language **English**

Height

Weight



**Comments (0)**

Topic	Comment

HCN **NBDIS**    **911794816**

**Plans (1)**

SubPlan Code	Group ID	Client ID	Expiry
1	NBDIS	911794816	

**Allergies (0)**

**Medical Conditions (0)**

**Groups (0)**

General | Family | Nursing Home | Communications | Other ← Ctrl →

**Patient**

Active

Patient Type **Human**

Deceased On

**Prescriptions**

Delivery Type **Default (Pickup)**

Delivery Route

Price Group **<None>**

Drug line 1 **Default** 2 **Default**

Double Count **Not Required**

Snap Caps Requested  Snap Caps Documented

No Kroll Care  Compliance Calendar on Label

**Consent**

Privacy **Unknown**

**Unit Dose**

Type **<None>**

Cycle **<None>**

Price Group **<Default> (<None>)**

**Rx Totals**

Rx Count

Dollar value

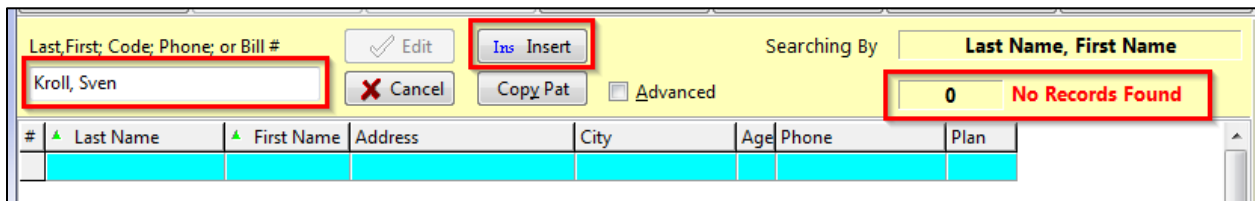
**DIS Data Status**

Synchronized

ID

## Scenario 4 – New Patient (Not Found in Kroll or Client Registry)

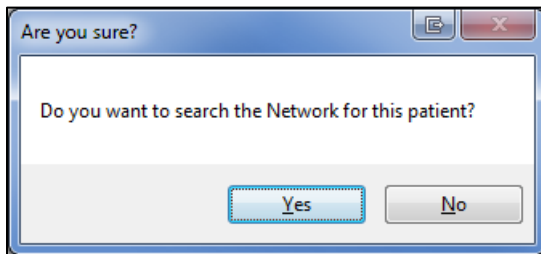
1. Search for the patient using the **F3 - Patient** search.
2. Verify that the patient does not exist in the local Kroll database, then click **Ins** or press **Insert** on the keyboard.



The screenshot shows a search window with a search bar containing 'Kroll, Sven'. The search criteria are set to 'Last Name, First Name'. The results area shows '0 No Records Found'. The 'Ins Insert' button is highlighted with a red box.

#	Last Name	First Name	Address	City	Age	Phone	Plan

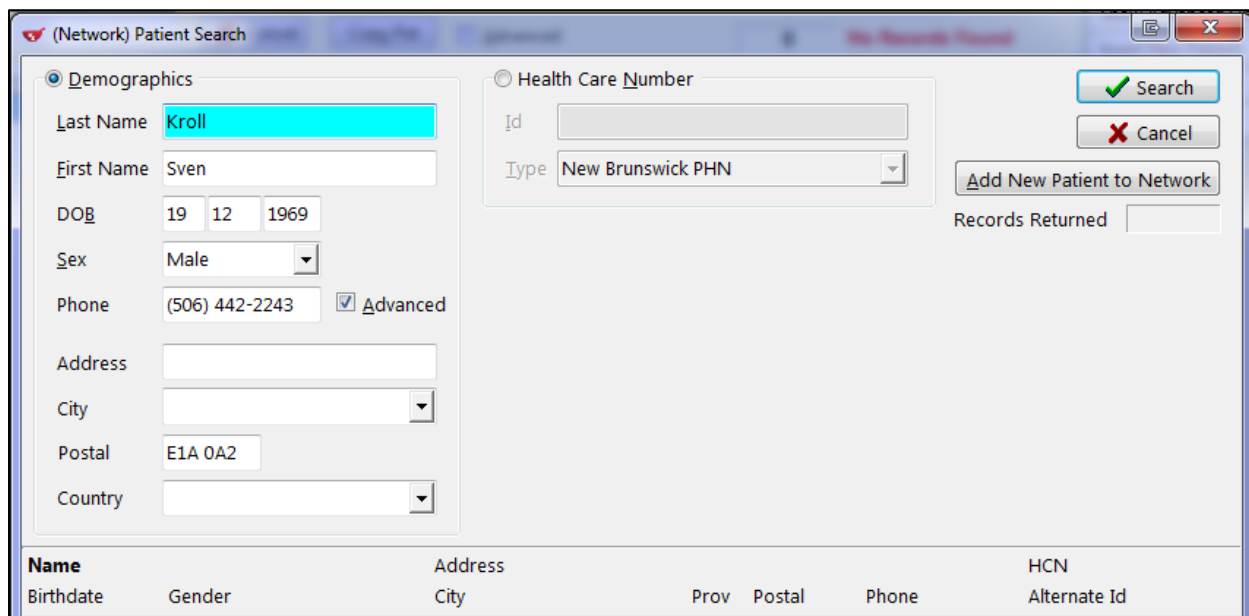
3. When asked 'Do you want to search the Network for this patient?' answer **Yes** to search the CR for a matching patient.



The dialog box asks 'Do you want to search the Network for this patient?' and has 'Yes' and 'No' buttons.

4. Input all available patient information into the **Network Patient Search** window and click **Search** or press **Enter** on the keyboard to search the CR for the patient.

**NOTE:** When the health care number is not available, the last name and date of birth or last name and postal code or phone number must be provided in order to initiate the search. Searching by middle name is also an option; however, no separate field is present in Kroll. The middle name can be entered by itself in the first name field or the combination of both the first and middle name can be placed in the first name field.



The screenshot shows a software window titled "(Network) Patient Search". It has two main sections: "Demographics" (selected) and "Health Care Number".

**Demographics Section:**

- Last Name:
- First Name:
- DOB:
- Sex:
- Phone:   Advanced
- Address:
- City:
- Postal:
- Country:

**Health Care Number Section:**

- Id:
- Type:

**Buttons:** Search (with green checkmark), Cancel (with red X), Add New Patient to Network

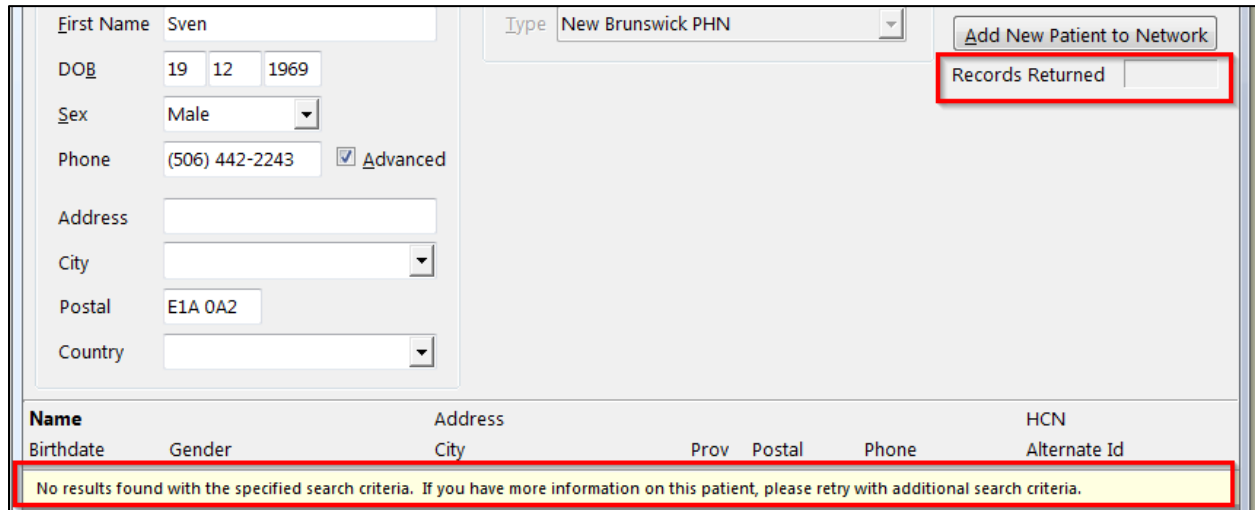
**Records Returned:**

**Table Header:**

Name		Address		HCN		
Birthdate	Gender	City	Prov	Postal	Phone	Alternate Id

5. If the search does not return any matching patient records, you can perform an **Advanced** patient network search by checking the **Advanced** flag.

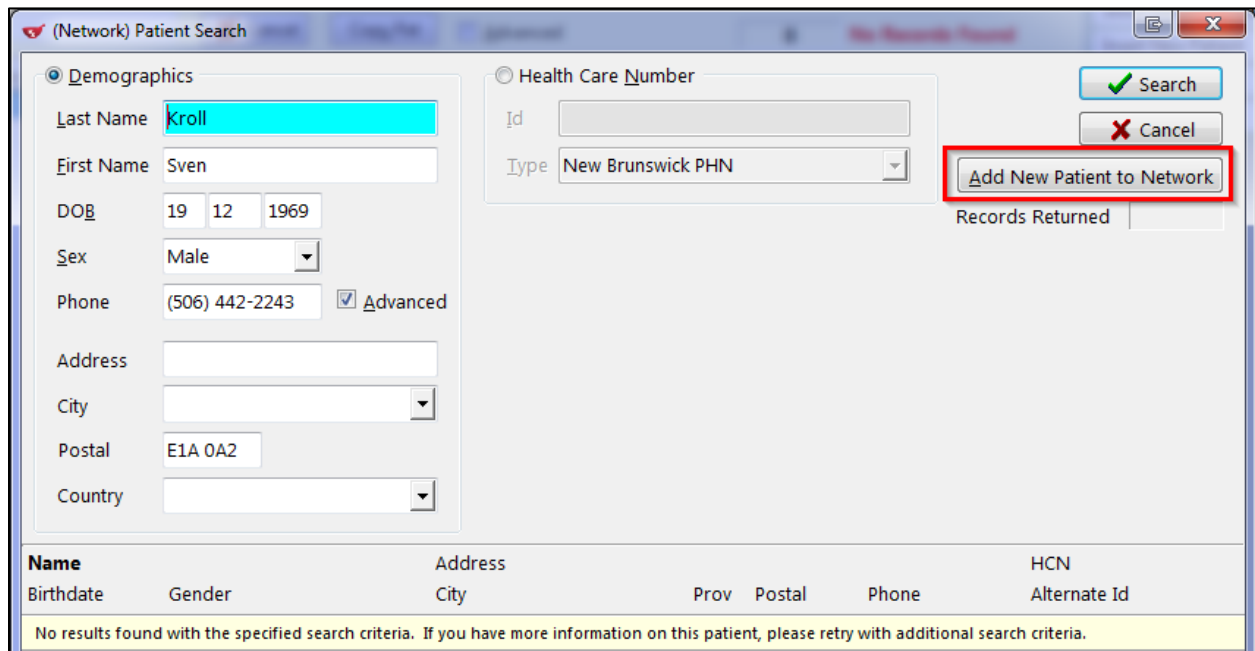
**NOTE:** If no records are returned for the search criteria entered, you will be shown a message indicating “No results found with the specified search criteria. If you have more information on this patient, please retry with additional search criteria”.



First Name: Sven  
 DOB: 19 12 1969  
 Sex: Male  
 Phone: (506) 442-2243  Advanced  
 Address:   
 City:   
 Postal: E1A 0A2  
 Country:   
 Type: New Brunswick PHN  
 Add New Patient to Network  
 Records Returned:   

Name	Address	HCN				
Birthdate	Gender	City	Prov	Postal	Phone	Alternate Id
No results found with the specified search criteria. If you have more information on this patient, please retry with additional search criteria.						

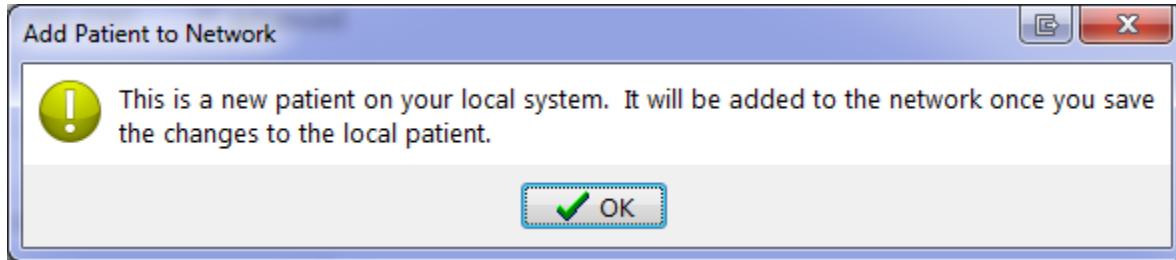
- If all available patient information has been entered to search for the patient and still no matching results are returned, click **Add New Patient to Network**.



(Network) Patient Search  
 Demographics: Last Name: Kroll, First Name: Sven, DOB: 19 12 1969, Sex: Male, Phone: (506) 442-2243  Advanced  
 Health Care Number: Id:   
 Type: New Brunswick PHN  
 Search   
 Cancel   
 Add New Patient to Network  
 Records Returned:   

Name	Address	HCN				
Birthdate	Gender	City	Prov	Postal	Phone	Alternate Id
No results found with the specified search criteria. If you have more information on this patient, please retry with additional search criteria.						

- You will then receive a warning that this is a new patient and they will be added to the network once you have saved the changes to the local system



- Complete all necessary patient information and click **Save** or press **Enter** on the keyboard to save the patient file. The local patient information will now be recorded on the DIS for this patient.

F3 - Patient    F5 - Drug    F7 - Doctor    F9 - Workflow    F10 - Pickup    F11 - Drop-off    F12 - New Rx

Last Name: Kroll    First Name: Sven    Salutation: [dropdown]    **Changed**    **Save**    **Cancel**

Address 1: 22 Rue Tranquille    Phone Numbers (1): [table]    Birthdate: 19/12/1969

Address 2: [empty]    Description: [empty]    Age: 46 years

City: Dieppe    Prov: NB    Home: (506) 442-2243    Gender: Male

Postal: E1A 0A2    Country: Canada    Language: English

Email: [empty]    Family Doctor: [empty]    Height: [empty]    Weight: [empty]

Quick Code: [empty]    HCN: [empty]

Comments (0): [table]

Plans (0): [table]

Allergies (0): [empty]    Medical Conditions (0): [empty]    Groups (0): [empty]

General    Family    Nursing Home    Communications    Other

Patient:  Active    Patient Type: Human    Deceased On: [empty]

Prescriptions: Delivery Type: [dropdown]    Delivery Route: [dropdown]    Price Group: <None>    Drug line 1: Default    2: Default    Double Count: [dropdown]

Snap Caps Requested     Snap Caps Documented     No Kroll Care     Compliance Calendar on Label

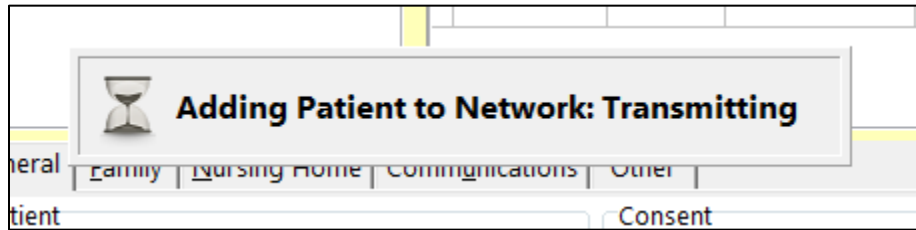
Consent: Privacy: Unknown

Unit Dose: Type: <None>    Cycle: <None>    Price Group: <Default> (<None>)

Rx Totals: Rx Count: [empty]    Dollar value: [empty]    Reset    date

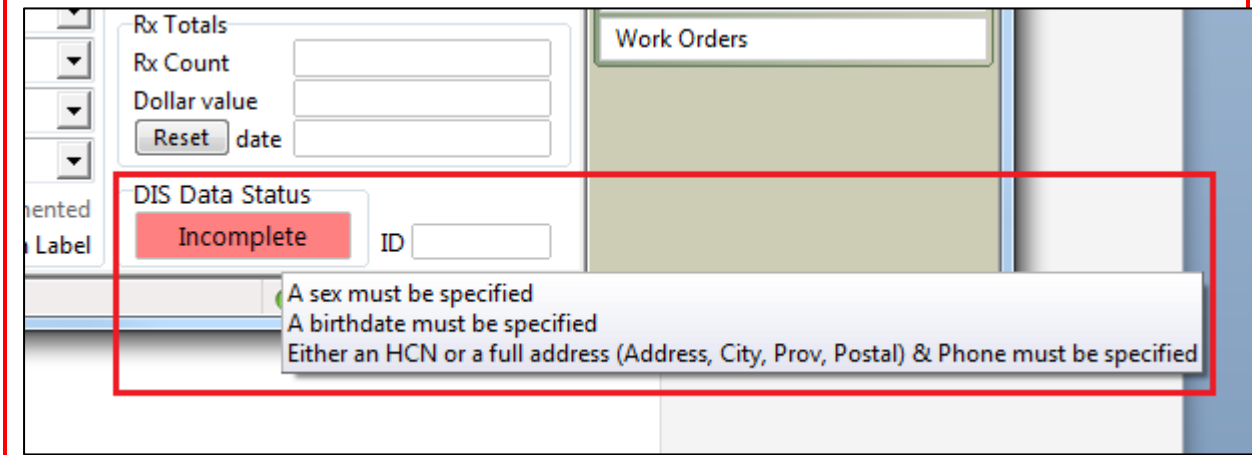
DIS Data Status: **Unsynchronized**    ID: [empty]

9. Once you have saved the patient, the system will transmit the information to the network.



10. Upon completion, the DIS Data Status will show a green 'Synchronized' indicator.

**Note:** If the patient doesn't have enough information entered, the DIS Data Status will show a red **Incomplete**. When you hover your mouse over the **Incomplete** status, it will display the information that is missing and required.

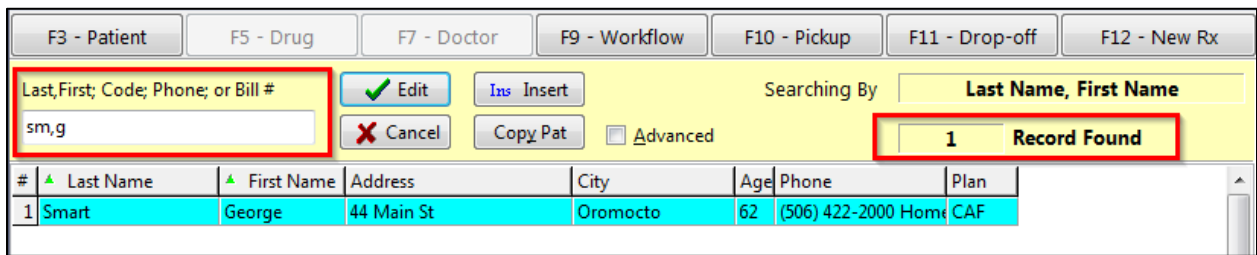


## Out-of-Province Patients (Federal Plan Members - CAF, IA, RCMP, VET) - Alternate IDs

Some New Brunswick patients will have a PHN issued out of province, or an ID issued by a federal agency.

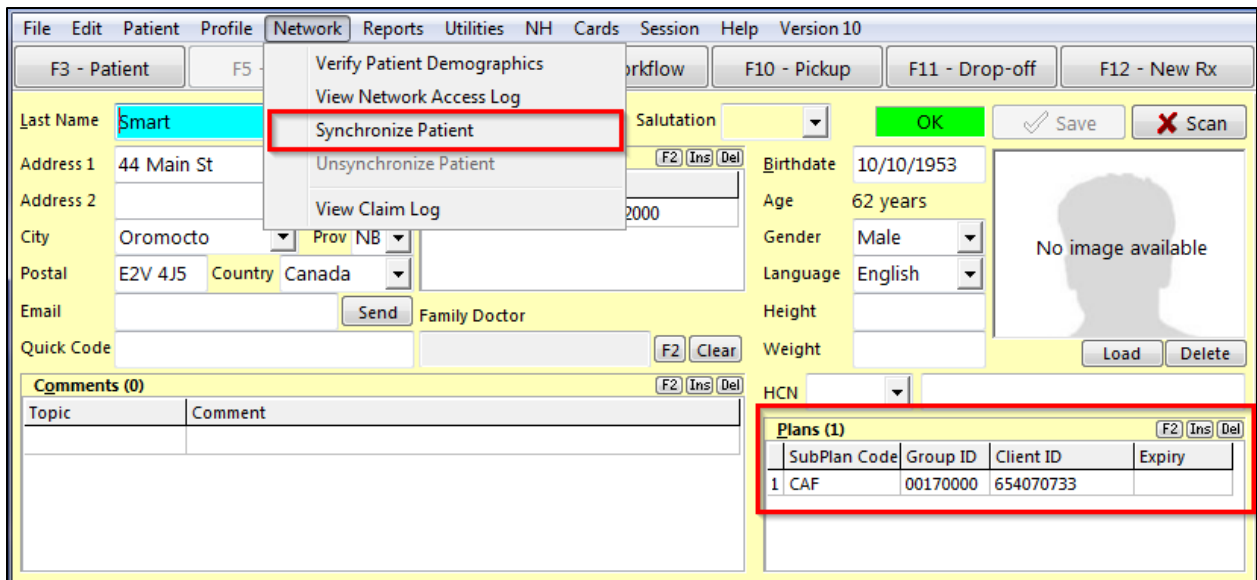
### Existing Local Patient

1. Search for the patient in the local Kroll system.



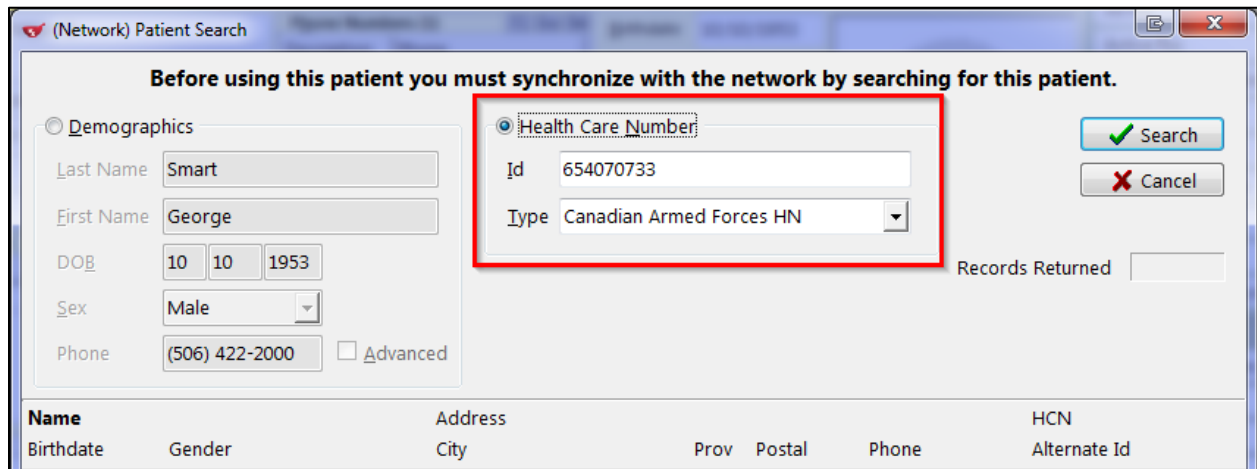
#	Last Name	First Name	Address	City	Age	Phone	Plan
1	Smart	George	44 Main St	Oromocto	62	(506) 422-2000 Home	CAF

2. From the patient card, go to **Network > Synchronize Patient**. Enter your login credentials.



SubPlan Code	Group ID	Client ID	Expiry
1 CAF	00170000	654070733	

- From the **(Network) Patient Search**, search for the patient on the Client Registry. The ID **Type** has been changed to the appropriate plan/provincial identifier.



**(Network) Patient Search**

Before using this patient you must synchronize with the network by searching for this patient.

Demographics

Last Name: Smart  
 First Name: George  
 DOB: 10 / 10 / 1953  
 Sex: Male  
 Phone: (506) 422-2000  Advanced

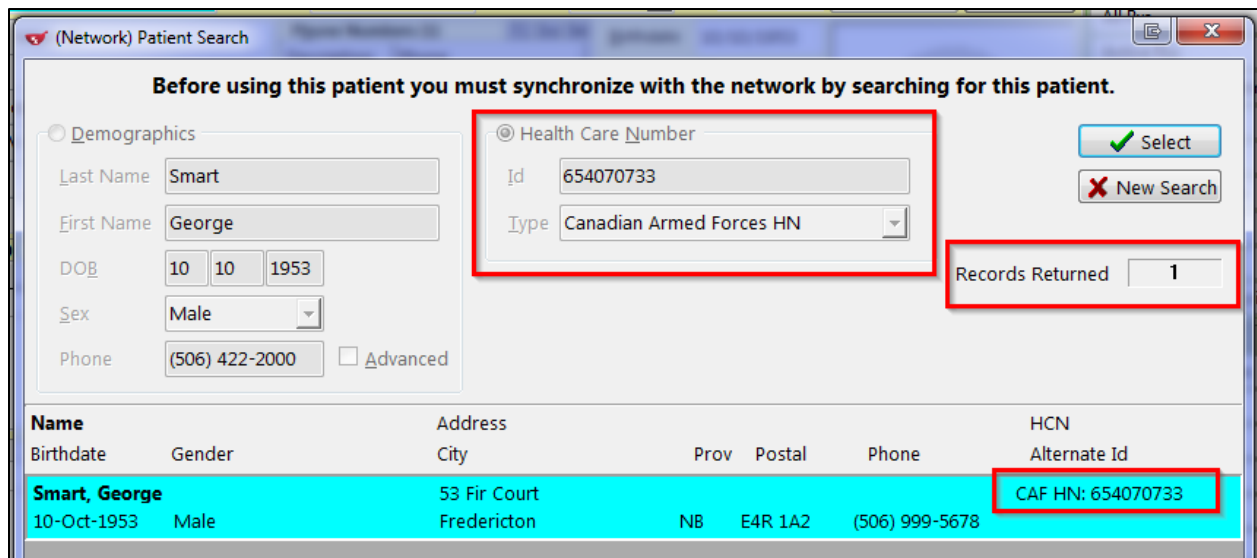
Health Care Number

Id: 654070733  
 Type: Canadian Armed Forces HN

Records Returned:

Name	Address	HCN
Birthdate	Gender	City
	Prov	Postal
	Phone	Alternate Id

- If the patient is FOUND, the Client Registry will return the alternate ID in the field directly below the PHN field.



**(Network) Patient Search**

Before using this patient you must synchronize with the network by searching for this patient.

Demographics

Last Name: Smart  
 First Name: George  
 DOB: 10 / 10 / 1953  
 Sex: Male  
 Phone: (506) 422-2000  Advanced

Health Care Number

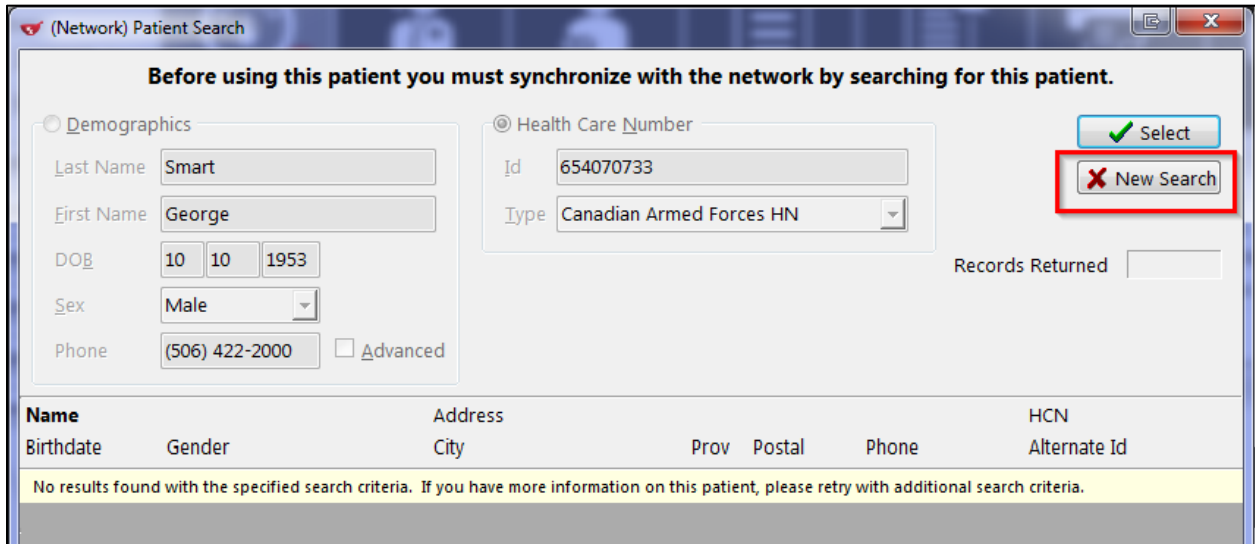
Id: 654070733  
 Type: Canadian Armed Forces HN

Records Returned: **1**

Name	Address	HCN
Birthdate	Gender	City
	Prov	Postal
	Phone	Alternate Id
<b>Smart, George</b>	53 Fir Court	<b>CAF HN: 654070733</b>
10-Oct-1953	Male	Fredericton
	NB	E4R 1A2
	(506) 999-5678	



b) If the patient is NOT FOUND, select **New Search**.



**(Network) Patient Search**

**Before using this patient you must synchronize with the network by searching for this patient.**

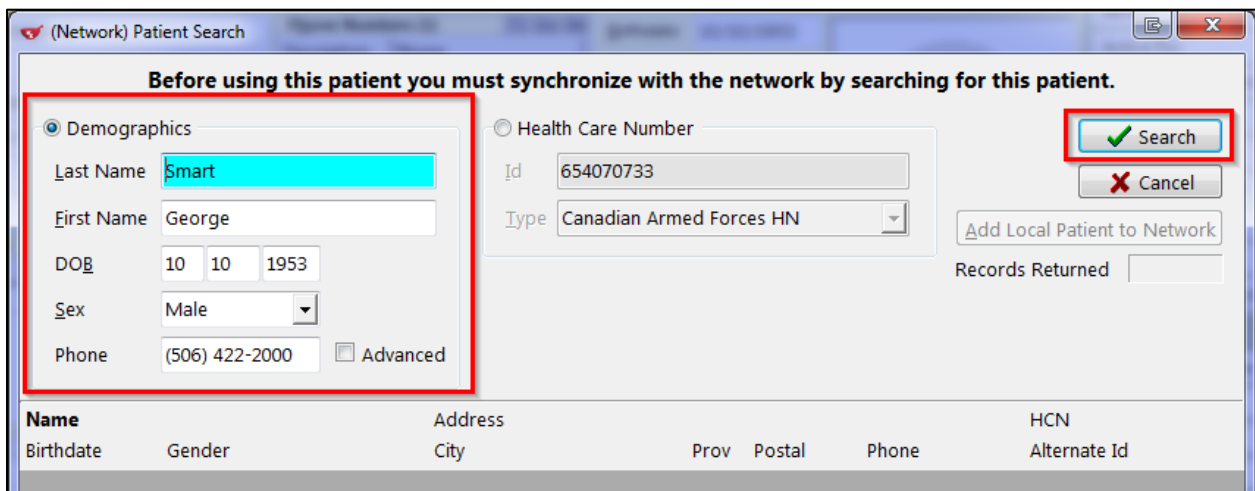
Demographics  
 Last Name: Smart  
 First Name: George  
 DOB: 10 10 1953  
 Sex: Male  
 Phone: (506) 422-2000  Advanced

Health Care Number  
 Id: 654070733  
 Type: Canadian Armed Forces HN

Records Returned:

Name	Address	HCN
Birthdate	Gender	City
	Prov	Postal
	Phone	Alternate Id
No results found with the specified search criteria. If you have more information on this patient, please retry with additional search criteria.		

i. Click on the **Demographics** radio button and retry the search with the minimum requirements.



**(Network) Patient Search**

**Before using this patient you must synchronize with the network by searching for this patient.**

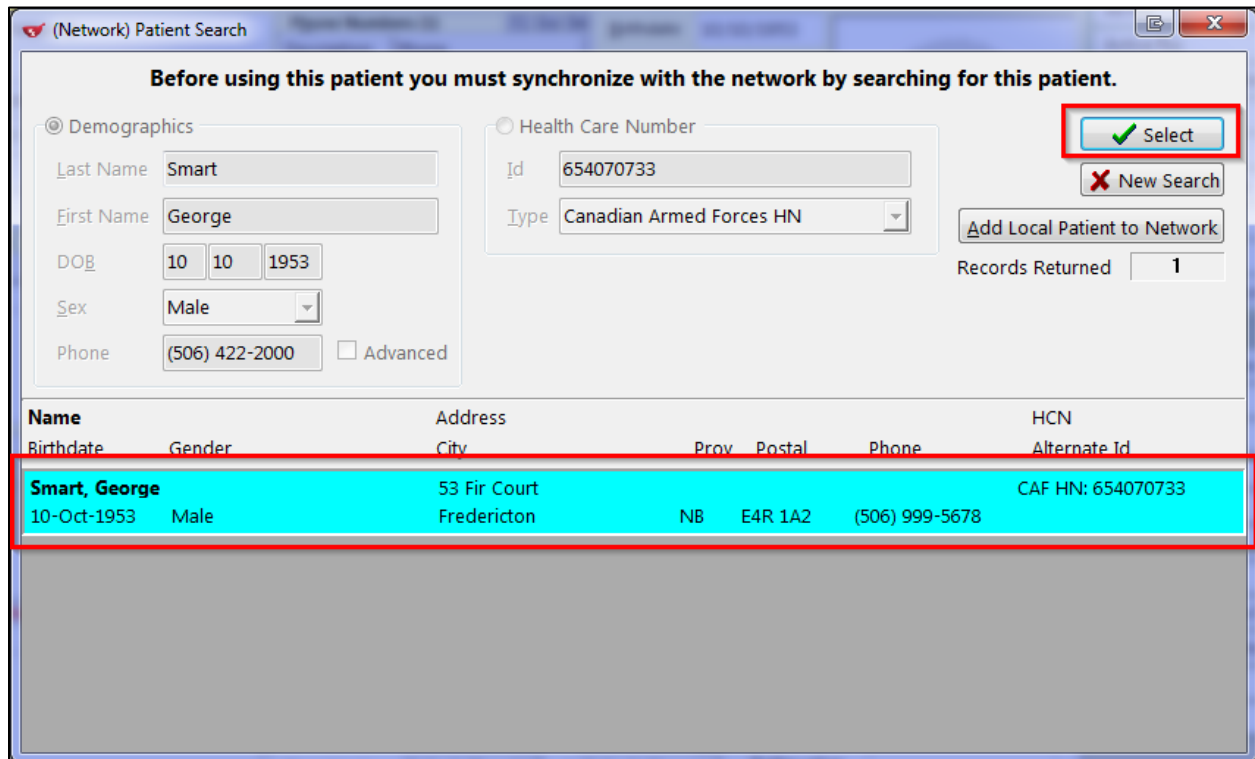
Demographics  
 Last Name: Smart  
 First Name: George  
 DOB: 10 10 1953  
 Sex: Male  
 Phone: (506) 422-2000  Advanced

Health Care Number  
 Id: 654070733  
 Type: Canadian Armed Forces HN

Records Returned:

Name	Address	HCN
Birthdate	Gender	City
	Prov	Postal
	Phone	Alternate Id

ii. If the patient is returned, choose **Select**.

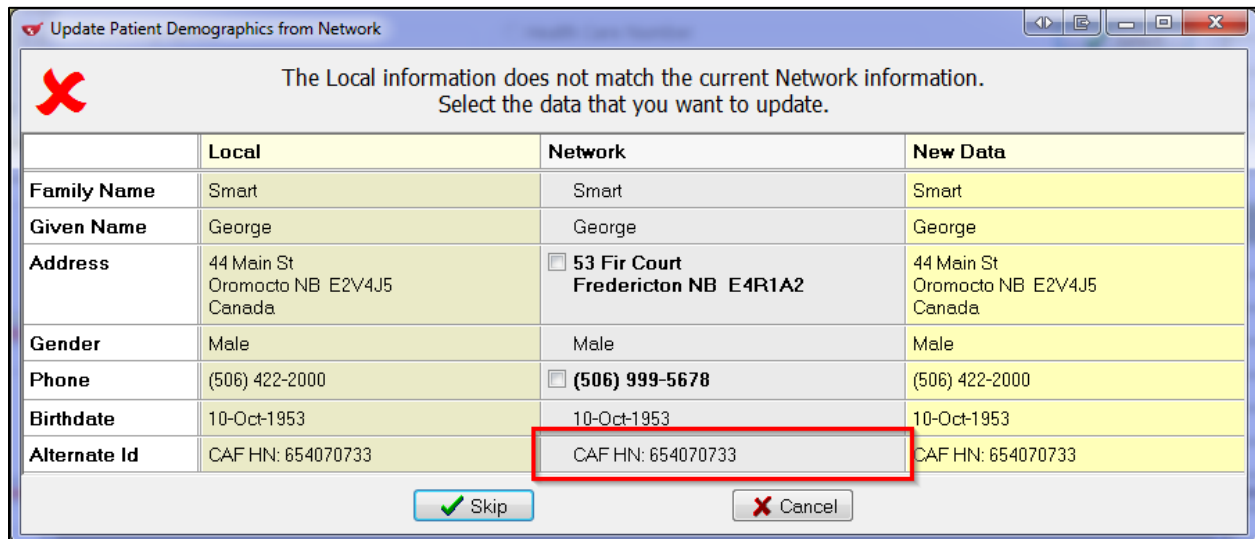


**Before using this patient you must synchronize with the network by searching for this patient.**

Demographics: Last Name: Smart, First Name: George, DOB: 10/10/1953, Sex: Male, Phone: (506) 422-2000. Health Care Number: Id: 654070733, Type: Canadian Armed Forces HN.

Name	Address	HCN
Birthdate	City	Alternate Id
<b>Smart, George</b>	53 Fir Court Fredericton	CAF HN: 654070733
10-Oct-1953	NB E4R 1A2 (506) 999-5678	

4. Selecting the patient will call up the **Patient Update** window. Select all the parameters that need to be updated into the local Kroll patient card and click **Update/Skip**.



The Local information does not match the current Network information. Select the data that you want to update.

	Local	Network	New Data
Family Name	Smart	Smart	Smart
Given Name	George	George	George
Address	44 Main St Oromocto NB E2V4J5 Canada	<input type="checkbox"/> 53 Fir Court Fredericton NB E4R1A2	44 Main St Oromocto NB E2V4J5 Canada
Gender	Male	Male	Male
Phone	(506) 422-2000	<input type="checkbox"/> (506) 999-5678	(506) 422-2000
Birthdate	10-Oct-1953	10-Oct-1953	10-Oct-1953
Alternate Id	CAF HN: 654070733	<input type="checkbox"/> CAF HN: 654070733	CAF HN: 654070733

- Patients with an alternate ID issued by a federal agency will have an **NBDIS** plan containing a blank client ID added to the patient card.

Last Name: Smart    First Name: George    Salutation:   
 Address 1: 44 Main St    Phone Numbers (1): (506) 422-2000    Birthdate: 10/10/1953    Age: 62 years    Gender: Male    Language: English    HCN: NBDIS

SubPlan Code	Group ID	Client ID	Expiry
1 CAF	00170000	654070733	
2 NBDIS			

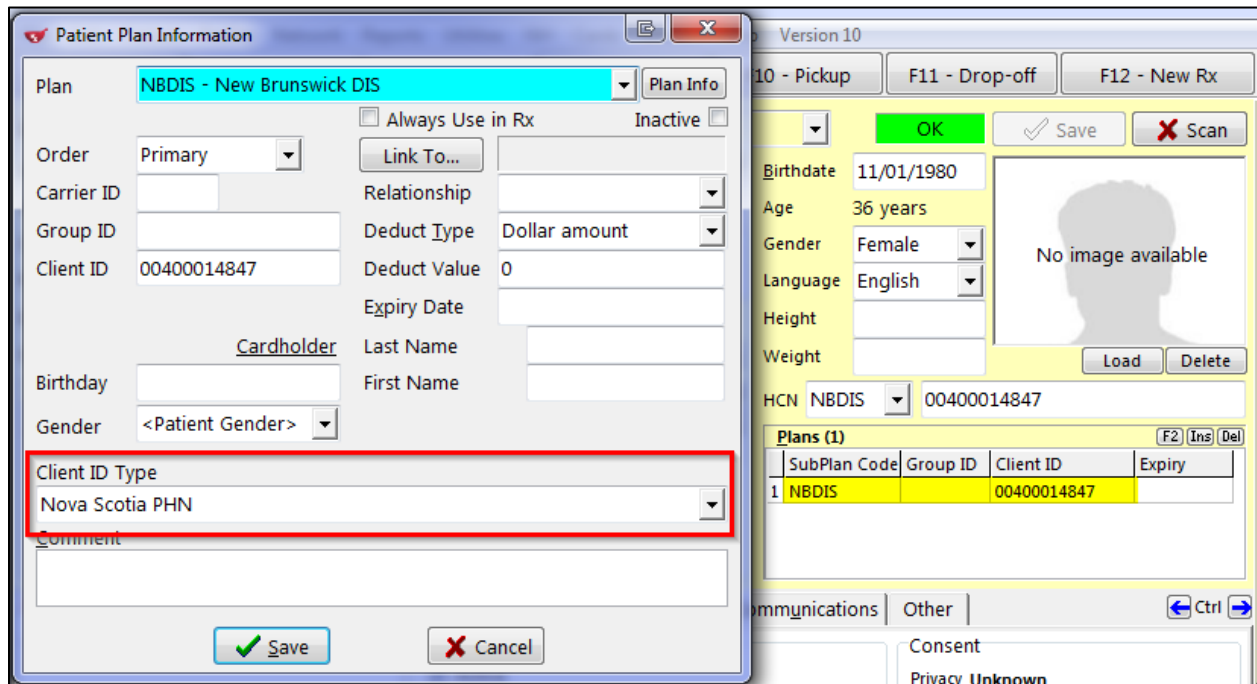
### Out-of-Province Patients

Patients with a PHN issued out of province will have an **NBDIS Plan** with their out-of-province **PHN** in the **Client ID** field added to the patient card.

Last Name: Winters    First Name: Elsa    Salutation:   
 Address 1: 33 Ochterloney St    Phone Numbers (1): (902) 219-3029    Birthdate: 11/01/1980    Age: 36 years    Gender: Female    Language: English    HCN: NBDIS    00400014847

SubPlan Code	Group ID	Client ID	Expiry
1 NBDIS		00400014847	

At the plan level, the **NBDIS Plan** will be identified with the province of issue **Client ID Type**.



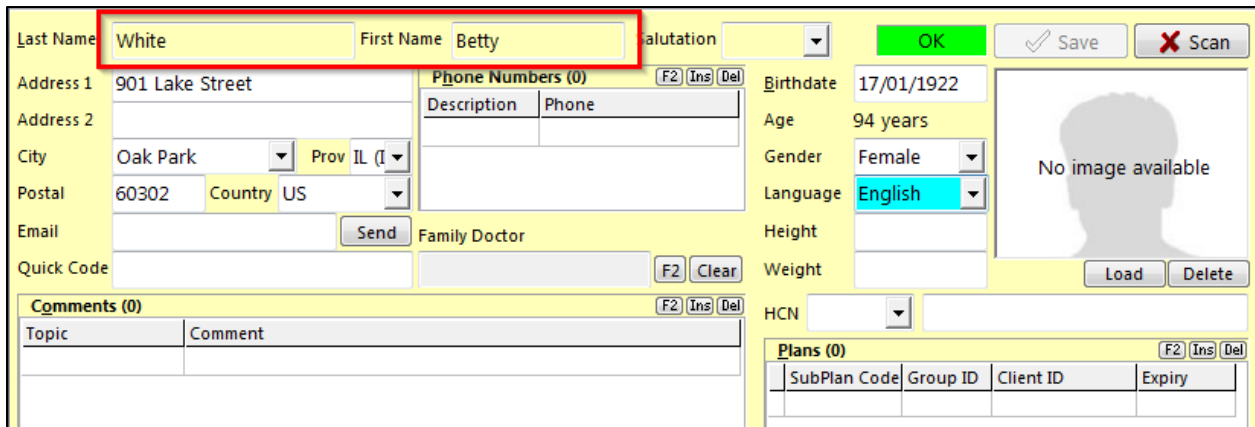
The screenshot shows a 'Patient Plan Information' dialog box overlaid on a main application window. In the dialog box, the 'Client ID Type' dropdown menu is highlighted with a red border and contains the text 'Nova Scotia PHN'. The main application window displays patient details such as Birthdate (11/01/1980), Age (36 years), Gender (Female), and a table of plans.

Plans (1)			
SubPlan Code	Group ID	Client ID	Expiry
1	NBDIS	00400014847	

## Patient with Multiple Given Names

Pharmacy users will often encounter situations where a patient will go by multiple names. For example, a patient may have registered with New Brunswick Health under the first name “Robert”, but would like the name on his vial labels to read “Bob”. A patient may have registered with New Brunswick Health using their maiden name, and then get married and adopt their spouse’s last name without informing the provincial Client Registry. In situations like these, users can send one name to DIS (or any plan) and have another name printed and recorded on the local Kroll patient file.

1. Search for and call up the local **F3 - Patient** card with the name that the patient is using.

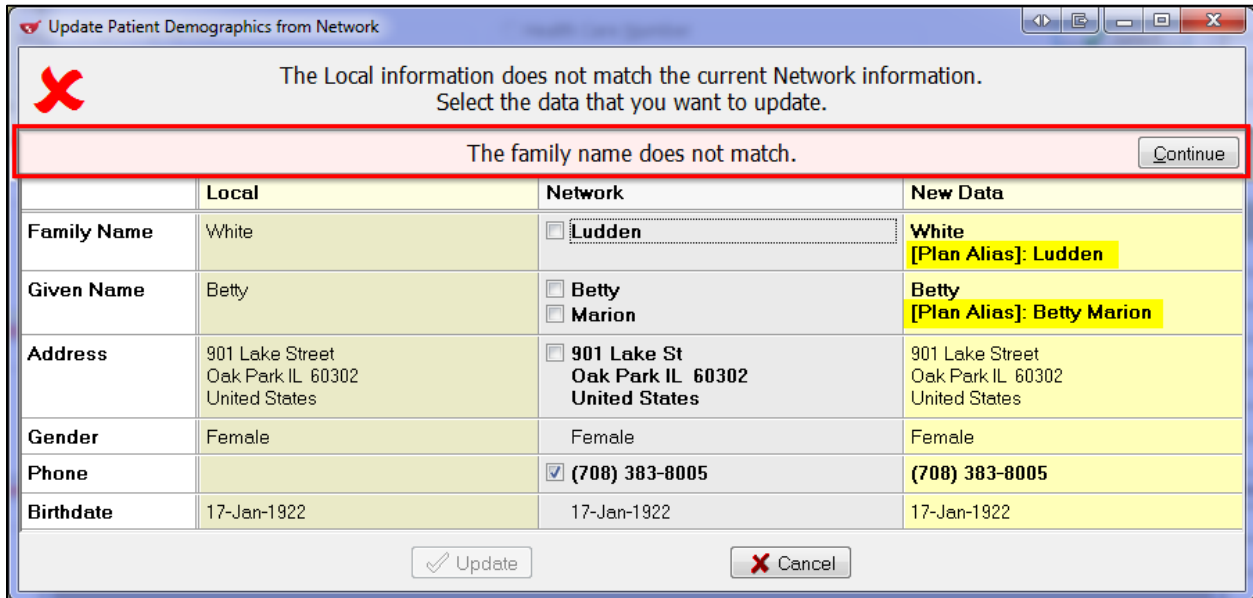


The screenshot shows a patient card interface with the following fields and values:

- Last Name: White
- First Name: Betty
- Address 1: 901 Lake Street
- Address 2: (empty)
- City: Oak Park
- Postal: 60302
- Country: US
- Birthdate: 17/01/1922
- Age: 94 years
- Gender: Female
- Language: English
- Family Doctor: (empty)
- Height: (empty)
- Weight: (empty)
- Comments (0): (empty table)
- Plans (0): (empty table)

2. From the patient card, go to **Network > Synchronize Patient** and enter your login credentials.

3. Search for and select the patient from the **(Network) Patient Search** results. The **Update Patient Demographics from Network** window will appear.



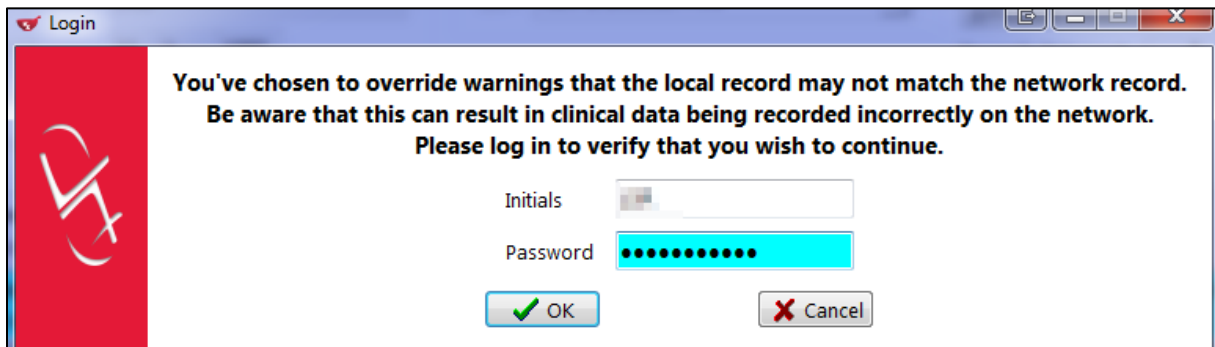
The Local information does not match the current Network information.  
Select the data that you want to update.

The family name does not match. Continue

	Local	Network	New Data
Family Name	White	<input type="checkbox"/> Ludden	White [Plan Alias]: Ludden
Given Name	Betty	<input type="checkbox"/> Betty <input type="checkbox"/> Marion	Betty [Plan Alias]: Betty Marion
Address	901 Lake Street Oak Park IL 60302 United States	<input type="checkbox"/> 901 Lake St Oak Park IL 60302 United States	901 Lake Street Oak Park IL 60302 United States
Gender	Female	Female	Female
Phone		<input checked="" type="checkbox"/> (708) 383-8005	(708) 383-8005
Birthdate	17-Jan-1922	17-Jan-1922	17-Jan-1922

Update Cancel

**NOTE:** Any differences in critical information, such as given name, date of birth, or gender will require you to click **Continue** and then login to acknowledge the override.



**Login**

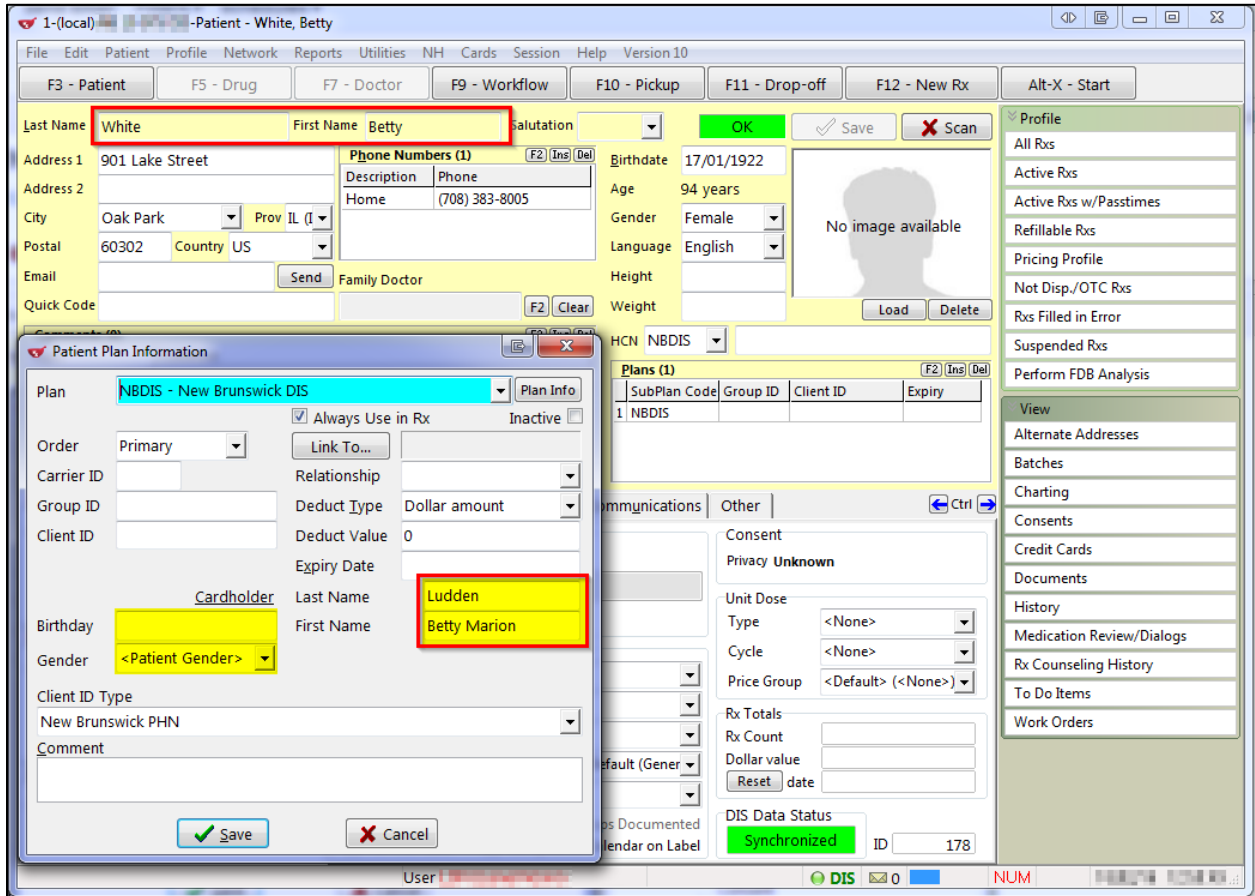
You've chosen to override warnings that the local record may not match the network record.  
Be aware that this can result in clinical data being recorded incorrectly on the network.  
Please log in to verify that you wish to continue.

Initials

Password

OK Cancel

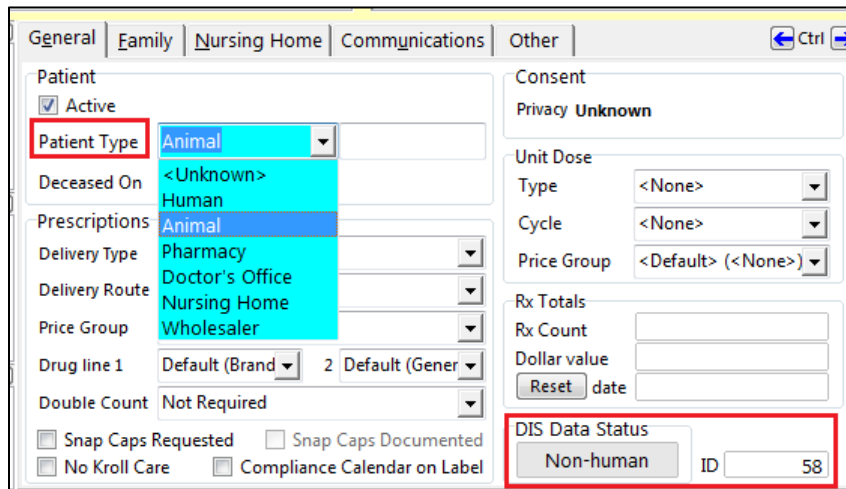
- Any of the name, date of birth, or gender fields you choose to not synchronize with the network will be shown with a prefix of **[Plan Alias]** and these aliases will be saved with the local NBDIS plan entry.



## Non-Human Patients

Non-human patients (animals, pharmacies, doctor's offices, nursing homes and wholesalers) will not have a PHN and therefore will not appear in the Client Registry.

1. For non-human patients the Patient Type must be selected. The patient's **DIS Data Status** will show **Non-human**.

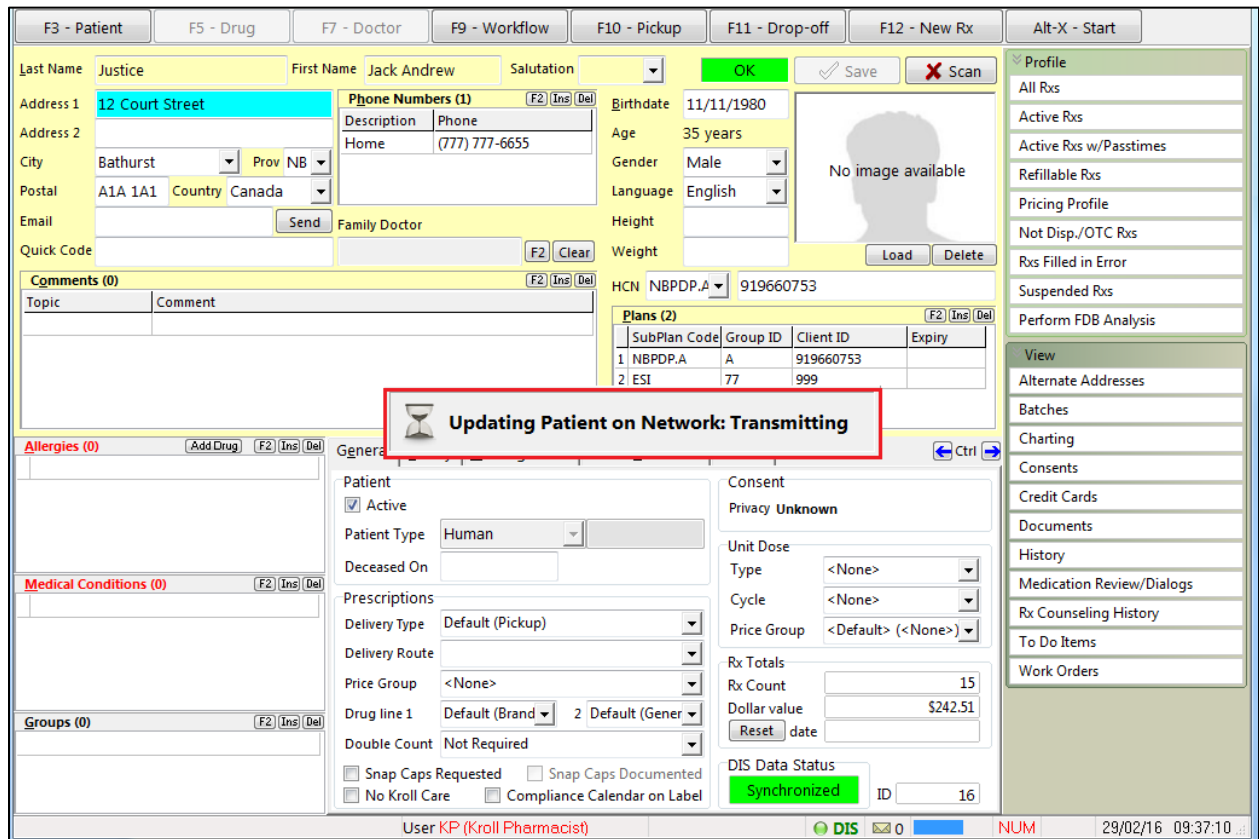


The screenshot shows a software interface for entering patient information. The 'Patient Type' dropdown menu is open, showing options: Animal, <Unknown>, and Human. The 'DIS Data Status' field is highlighted with a red box and contains the text 'Non-human'. The ID field next to it contains the number '58'. Other fields include 'Active' (checked), 'Deceased On' (<Unknown>), 'Prescriptions' (Animal), 'Delivery Type' (Pharmacy), 'Delivery Route' (Doctor's Office), 'Price Group' (Wholesaler), 'Drug line 1' (Default (Brand) and 2 Default (Gener)), 'Double Count' (Not Required), 'Consent' (Privacy Unknown), 'Unit Dose' (Type: <None>, Cycle: <None>, Price Group: <Default> (<None>)), and 'Rx Totals' (Rx Count, Dollar value, Reset date).



# Update Patient Demographics

For patient demographics recorded on the DIS, information entered by the pharmacy is considered the source of truth. If a patient’s address, phone number, etc. are changed on the local system, the information is updated on the DIS.



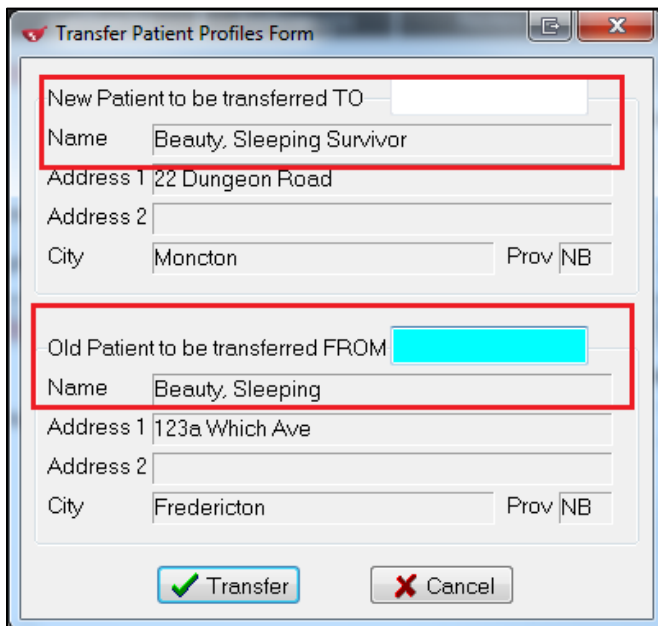
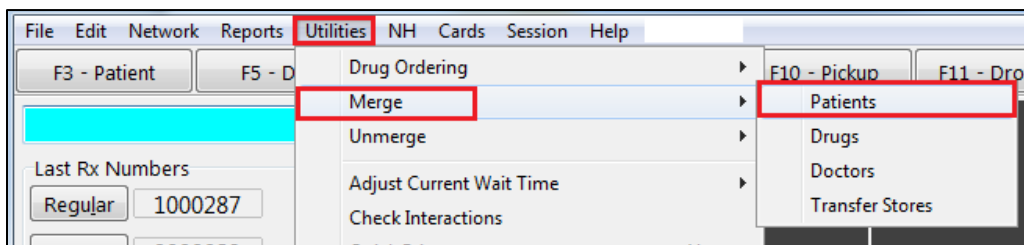
The screenshot displays the patient update interface for Jack Andrew Justice. The interface includes various fields for patient information, a 'Plans' table, and a 'Prescriptions' section. A red box highlights the message 'Updating Patient on Network: Transmitting'.

SubPlan Code	Group ID	Client ID	Expiry
1 NBDP.A	A	919660753	
2 ESI	77	999	

## Merging Duplicate Patients

It is recommended that if there are multiple patient records for the same patient that they are merged together in Kroll to maintain accurate patient information on the DIS. Merging the local patient records on Kroll will merge the corresponding records on DIS. To accomplish this, go to Kroll start screen and then **Utilities > Merge > Patient**.

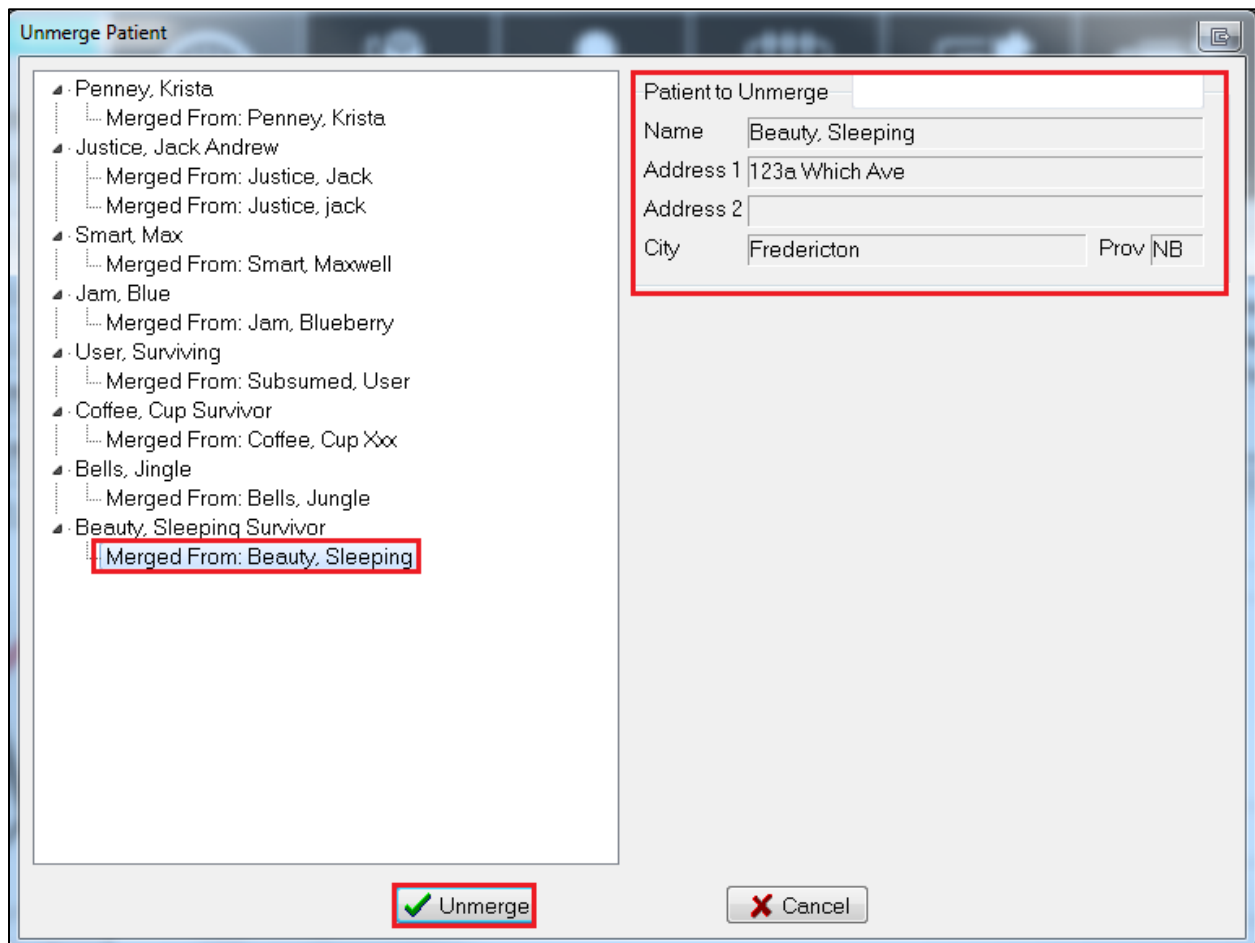
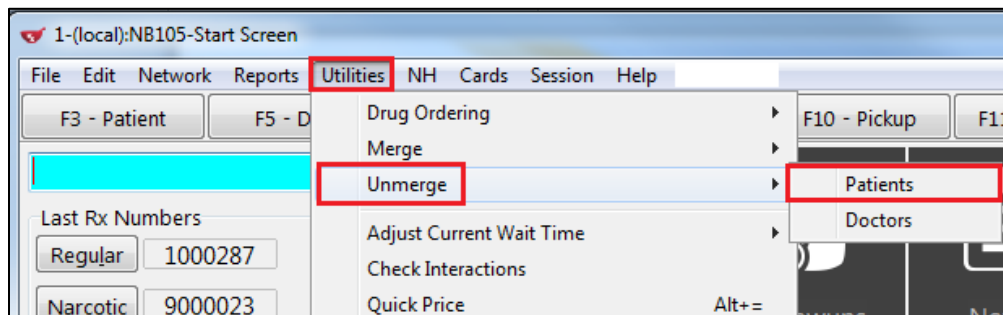
Enter the surviving patient as the **New Patient to be transferred TO** and the patient to be merged into the **Old Patient to be transferred FROM**.



The screenshot shows the 'Transfer Patient Profiles Form' window. It contains two main sections, each highlighted with a red box. The first section is for the 'New Patient to be transferred TO' and includes the following fields: Name (Beauty, Sleeping Survivor), Address 1 (22 Dungeon Road), Address 2, City (Moncton), and Prov (NB). The second section is for the 'Old Patient to be transferred FROM' and includes the following fields: Name (Beauty, Sleeping), Address 1 (123a Which Ave), Address 2, City (Fredericton), and Prov (NB). At the bottom of the form are two buttons: 'Transfer' (with a green checkmark icon) and 'Cancel' (with a red X icon).

## Unmerging Patients

If a merge was done in error, you can reverse the merge.

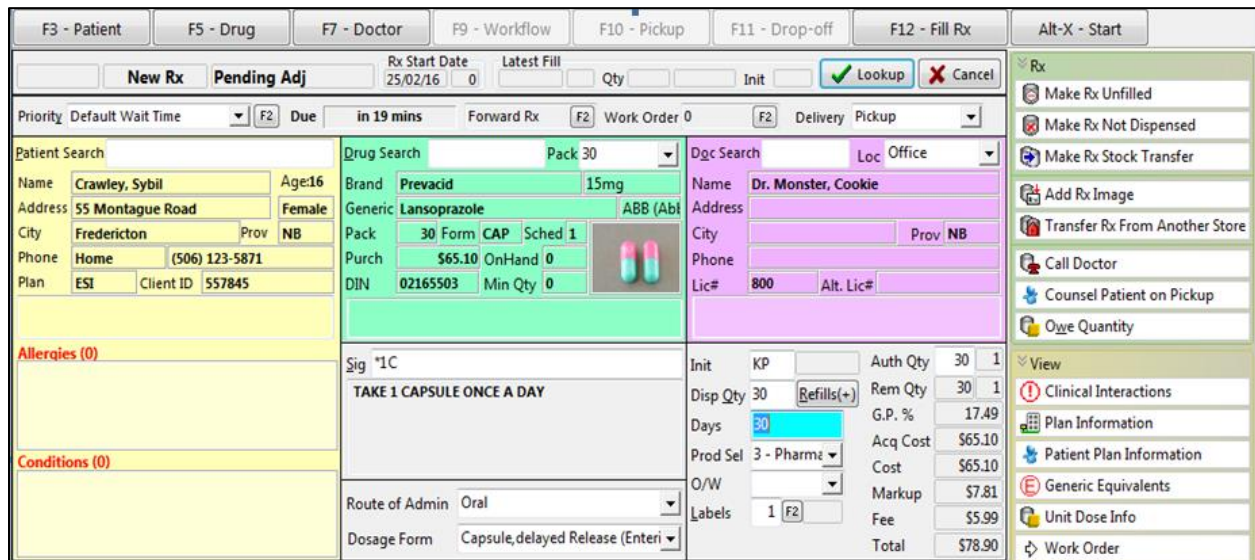


## Filling Prescriptions on New Brunswick DIS

All prescriptions filled for human patients in New Brunswick must be sent to the New Brunswick DIS for clinical recording. With New Brunswick DIS integration in Kroll, prescriptions should first be adjudicated to all fiscal plan(s) for financial reimbursement, and then sent to DIS for clinical recording. The “Cash” plan will always come after the DIS plan. This sequence of plans allows prescriptions to be billed, and then logged on the New Brunswick DIS before passing down any remaining co-payment amounts to the patient. In the event that the DIS Network is down, you can bill the fiscal plans, print the label, and then place the Rx in a **Network Pending Queue** until the DIS Network is back up at which point the Rx can be completed in its entirety. (See the [What to do when NBDIS is Unavailable](#) section for more information).

### Dispensing a Prescription

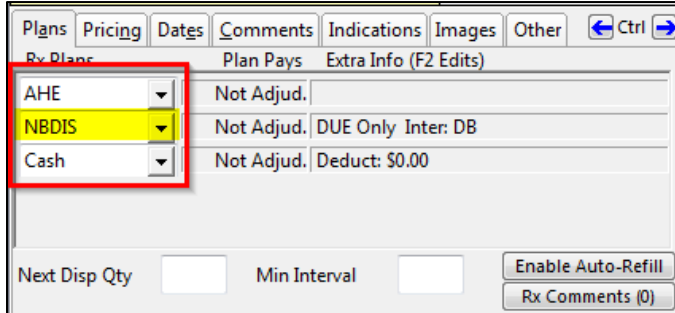
1. Enter patient, drug, doctor, sig, dispense information, etc. in the F12 screen.



Patient Search		Drug Search		Dgc Search	
Name	Crawley, Sybil	Brand	Prevacid 15mg	Name	Dr. Monster, Cookie
Address	55 Montague Road	Generic	Lansoprazole ABB (Abi)	Address	
City	Fredericton	Pack	30 Form CAP Sched 1	City	
Phone	Home (506) 123-5871	Purch	\$65.10 OnHand 0	Phone	
Plan	ESI Client ID 557845	DIN	02165503 Min Qty 0	Lic#	800 Alt. Lic#
Age	16			Init	KP
Sex	Female	Sig	*1C	Auth Qty	30 1
Allergies (0)			TAKE 1 CAPSULE ONCE A DAY	Disp Qty	30 Refills(+)
Conditions (0)		Route of Admin	Oral	Days	30
		Dosage Form	Capsule, delayed Release (Enteri)	Prod Sel	3 - Pharm
				O/W	
				Labels	1 F2
				Acq Cost	\$65.10
				Cost	\$65.10
				Markup	\$7.81
				Fee	\$5.99
				Total	\$78.90

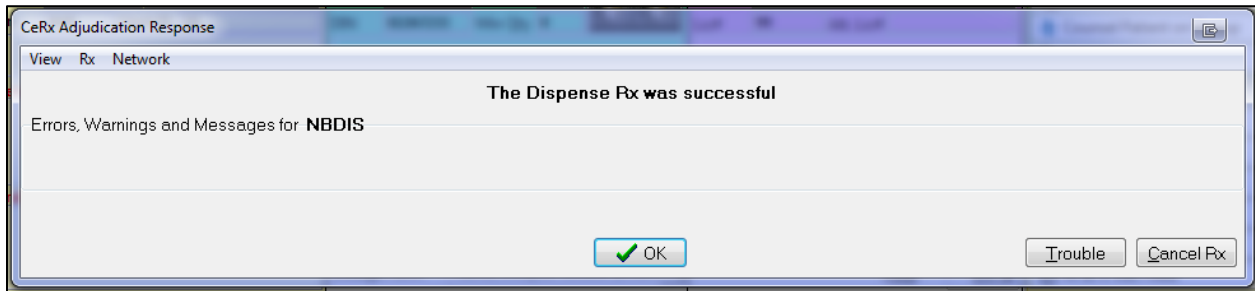
2. Ensure that the New Brunswick DIS plan is the last plan before 'Cash'.

**NOTE:** The NBDIS plan is always marked as Drug Utilization Evaluation Only “DUE Only”, which means there is no financial adjudication involved.



The screenshot shows a software interface with a dropdown menu for 'Rx Plans'. The menu is open, showing three options: 'AHE', 'NBDIS', and 'Cash'. The 'NBDIS' option is highlighted in yellow. Below the dropdown, there are fields for 'Plan Pays' and 'Extra Info (F2 Edits)'. The 'Plan Pays' field contains 'Not Adjud.' and the 'Extra Info' field contains 'DUE Only Inter: DB' for the NBDIS option. At the bottom of the window, there are input fields for 'Next Disp Qty' and 'Min Interval', and buttons for 'Enable Auto-Refill' and 'Rx Comments (0)'.

3. Once all necessary information has been entered, click **F12 - Fill Rx** or press F12 on the keyboard to fill the prescription.
4. Adjudication to the fiscal plan(s) will be completed first and then the Rx will be sent to NBDIS – New Brunswick DIS for clinical recording. You will get a response stating ‘The Dispense Rx was successful’ and a prescription label will print once **OK** is selected.

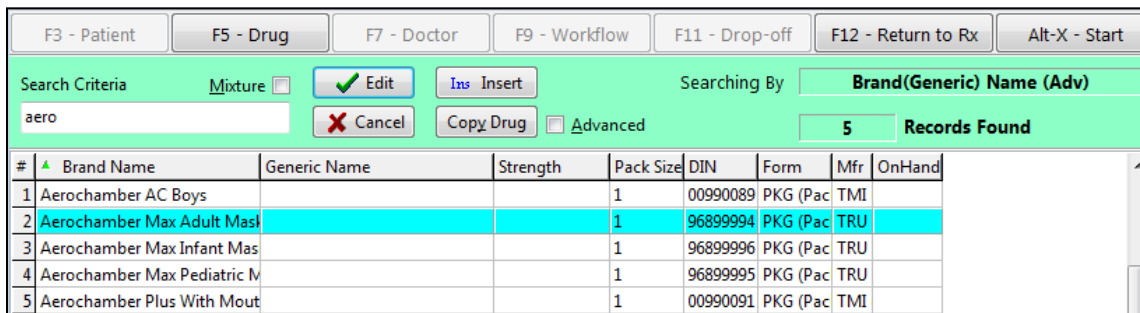


The screenshot shows a dialog box titled 'CeRx Adjudication Response'. The dialog has a 'View' button and a 'Network' label. The main text area displays 'The Dispense Rx was successful' and 'Errors, Warnings and Messages for NBDIS'. At the bottom, there are three buttons: 'OK' (with a green checkmark), 'Trouble', and 'Cancel Rx'.

## Filling Prescriptions for a Device

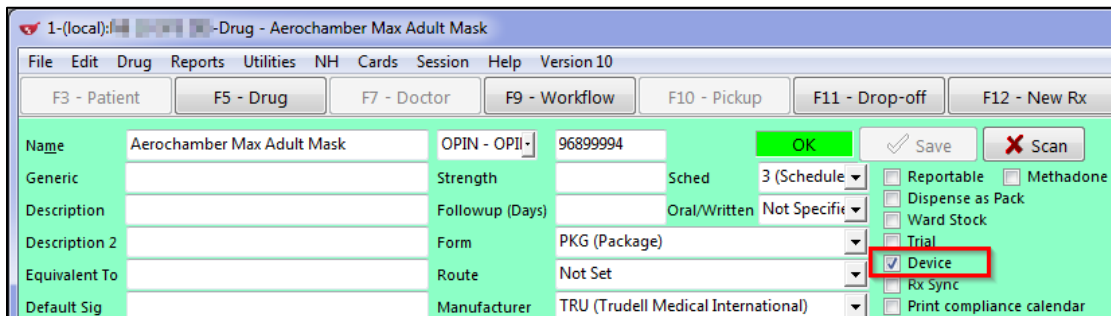
Devices are non-drug products. They can include, but are not limited to, diabetic strips, lancets, alcohol swabs, compression stockings, etc. When a prescription is filled for a device, it is not sent to the NBDIS. Fill an Rx for a device as follows:

1. Bring up the **F5 - Drug** card for a device by performing an F5 drug search.



#	Brand Name	Generic Name	Strength	Pack Size	DIN	Form	Mfr	OnHand
1	Aerochamber AC Boys			1	00990089	PKG (Pac)	TMI	
2	Aerochamber Max Adult Mask			1	96899994	PKG (Pac)	TRU	
3	Aerochamber Max Infant Mas			1	96899996	PKG (Pac)	TRU	
4	Aerochamber Max Pediatric M			1	96899995	PKG (Pac)	TRU	
5	Aerochamber Plus With Mout			1	00990091	PKG (Pac)	TMI	

2. Place a checkmark next to the **Device** flag.



1-(local): -Drug - Aerochamber Max Adult Mask

File Edit Drug Reports Utilities NH Cards Session Help Version 10

F3 - Patient F5 - Drug F7 - Doctor F9 - Workflow F10 - Pickup F11 - Drop-off F12 - New Rx

Name: Aerochamber Max Adult Mask OPIN - OPII 96899994 OK Save Scan

Generic: Strength Sched 3 (Schedule) Reportable Methadone

Description: Followup (Days) Oral/Written Not Specific Dispense as Pack

Description 2: Form PKG (Package) Trial

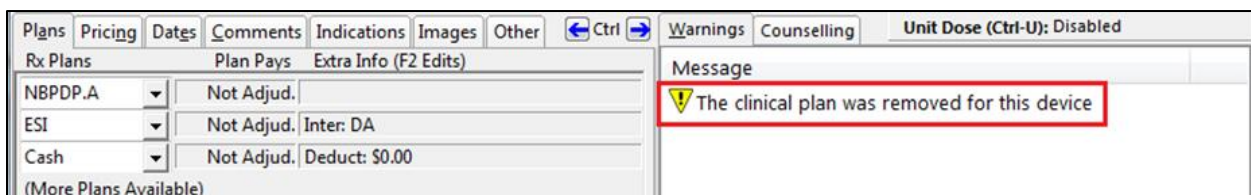
Equivalent To: Route Not Set  Device

Default Sig: Manufacturer TRU (Trudell Medical International) Rx Sync

Print compliance calendar

3. Click **Save** or press **Enter** on the keyboard to save changes made to the drug card.
4. Press **F12** to fill a new prescription

**NOTE:** If the drug being filled has the **Device** flag ON and the NBDIS plan is included in the plan sequence, the system automatically drops the NBDIS plan and a warning message will appear stating 'The clinical plan was removed for this device'.



Plans Pricing Dates Comments Indications Images Other Ctrl Warnings Counselling Unit Dose (Ctrl-U): Disabled

Rx Plans Plan Pays Extra Info (F2 Edits)

NBPDP.A	Not Adjud.	
ESI	Not Adjud.	Inter: DA
Cash	Not Adjud.	Deduct: \$0.00

(More Plans Available)

Message

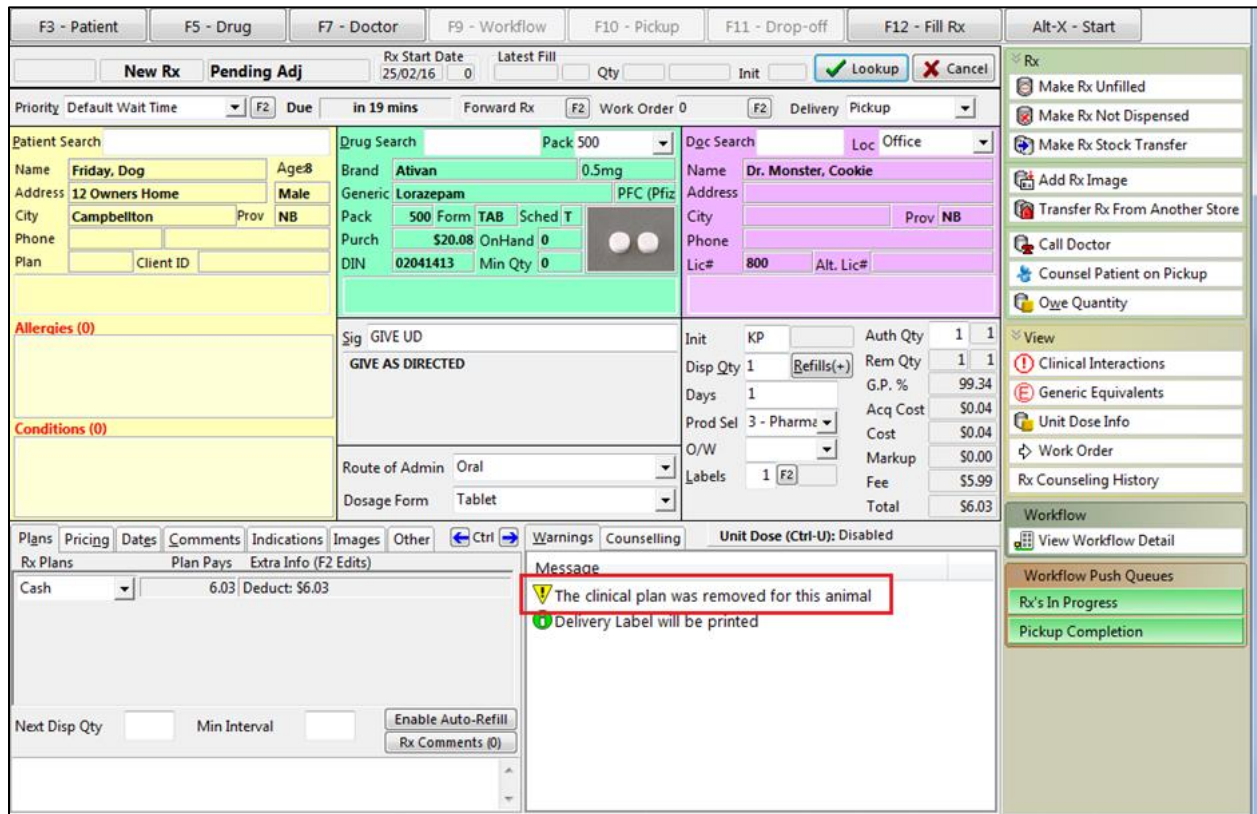
⚠ The clinical plan was removed for this device

## Unfilling a Prescription

When a patient requests the pharmacy to keep a record of the written prescription but not fill the prescription until a later time, they are unfilling the Rx or 'deferring' it. Unfilled Rx's are not sent to the NBDIS.

## Filling a Prescription for a Non-human

Prescriptions filled for non-humans (animals, pharmacies, doctor's offices, nursing homes and wholesalers) are not recorded on DIS.



The screenshot displays the NBDIS software interface for entering a prescription. The top navigation bar includes buttons for F3 - Patient, F5 - Drug, F7 - Doctor, F9 - Workflow, F10 - Pickup, F11 - Drop-off, F12 - Fill Rx, and Alt-X - Start. The main window is divided into several sections:

- Header:** Shows 'New Rx' and 'Pending Adj' status, 'Rx Start Date' (25/02/16), 'Latest Fill' (0), 'Qty', 'Init', 'Lookup', and 'Cancel' buttons.
- Priority/Status:** 'Priority' set to 'Default Wait Time', 'Due' in 19 mins, 'Forward Rx' (F2), 'Work Order' (0), 'Delivery' (F2), and 'Pickup' dropdown.
- Patient Search:** Name: Friday, Dog; Age: 8; Address: 12 Owners Home; City: Campbellton; Prov: NB.
- Drug Search:** Brand: Ativan; Pack: 500; Form: TAB; Sched: T; Generic: Lorazepam; PFC (Pfizer); Pack: 500; Form: TAB; Sched: T; Purch: \$20.08; OnHand: 0; DIN: 02041413; Min Qty: 0.
- Dgc Search:** Name: Dr. Monster, Cookie; Loc: Office; Address, City, Prov, NB; Lic#: 800; Alt. Lic#.
- Signatures:** Sig: GIVE UD; GIVE AS DIRECTED.
- Route of Admin:** Oral; Dosage Form: Tablet.
- Financials:** Init: KP; Auth Qty: 1; 1; Disp Qty: 1; Refills(+); Rem Qty: 1; 1; Days: 1; G.P. %: 99.34; Prod Sel: 3 - Pharm; Acq Cost: \$0.04; O/W: ; Cost: \$0.04; Labels: 1; Markup: \$0.00; Fee: \$5.99; Total: \$6.03.
- Plans:** Cash; Plan Pays: 6.03; Deduct: \$6.03.
- Message Box:** A yellow warning icon and a green information icon are present. The text reads: 'The clinical plan was removed for this animal' (highlighted in a red box) and 'Delivery Label will be printed'.
- Right Panel:** Contains various actions like 'Make Rx Unfilled', 'Make Rx Not Dispensed', 'Add Rx Image', 'Transfer Rx From Another Store', 'Call Doctor', 'Counsel Patient on Pickup', 'Owe Quantity', 'View' (Clinical Interactions, Generic Equivalents, Unit Dose Info, Work Order, Rx Counseling History), 'Workflow' (View Workflow Detail), and 'Workflow Push Queues' (Rx's In Progress, Pickup Completion).

## Filling Rxs for Doctors when License is Unknown

When a pharmacy first integrates with DIS, Kroll inserts all available doctors that have been provided by the New Brunswick Department of Health. In the event a doctor is missed and the doctor license is unknown, the following list of substitute licenses can be used on the doctor card to complete the Rx.

Doctor	License
In-province dentist	D1
Out-of-province dentist	D2
In-province medical doctor	D3
Out-of-province doctor	D4
In-province pharmacist	D5
Out-of-province pharmacist	D6
In-province registered nurse practitioner	D7
Out-of-province registered nurse practitioner	D8
In-province optometrist	D9
Out-province optometrist	D10
Out-of-province other provider	D999



F3 - Patient
F5 - Drug
F7 - Doctor
F9 - Workflow
F10 - Pickup
F11 - Drop-off
F12 - Return to Rx

Last Name **Smith**
First Name John
Salutation Dr. ▾
QuickCode 
OK
✓ Rx
✗ Scan

**Addresses**

**Locations (1)** (F2) (Ins) (Del)

Office
--------

Primary Location

Address 1 123 Jasper Ave

Address 2

City Edmonton ▾ Prov AB (Alberta) ▾

Postal T5Y 0E4 Country Canada ▾

Phone  Fax

Doctor Active

**Comments (0)** (F2) (Ins) (Del)

Topic	Comment

**Phone Numbers (0)** (F2) (Ins) (Del)

Description	Phone

**Groups (0)** (F2) (Ins) (Del)

--

**General** (Ctrl) (↔)

**Doctor Information**

Designation Doctor (Physician) ▾

Specialty

Prescribing Rights Full Rights ▾

Written Language English ▾

Spoken Language

**Primary License Number**

License D4

Prov AB (Alberta) ▾

Override  Ref ID

Signature

**Alternate License Number**

License

Prov

Override  Ref ID

**Prescriptions/Refills**

No Kroll Care

No Fax Refills

No Phone Refills

No MedReview Letter

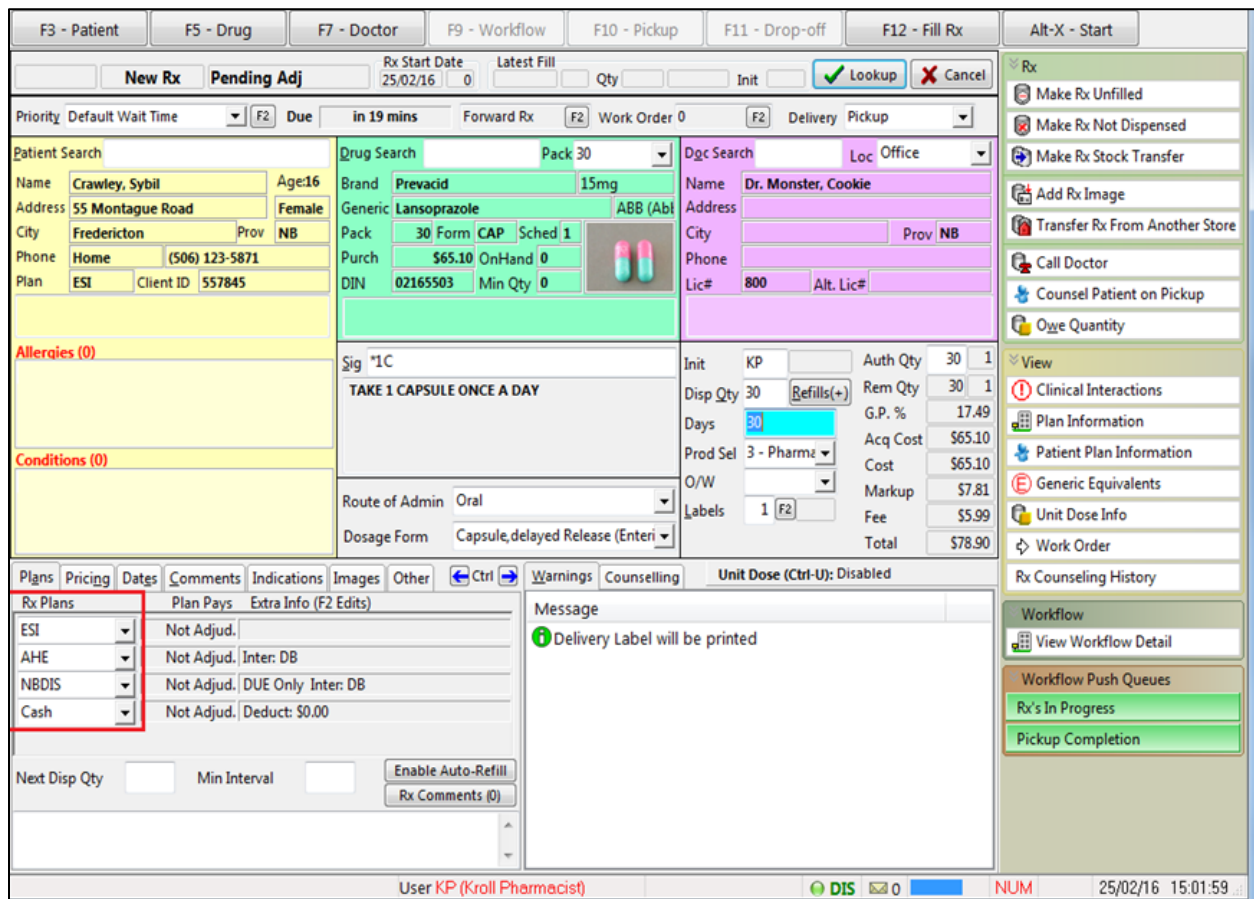
# What to do when NBDIS Goes Down

In the event the NBDIS server goes down, Kroll will queue the following claim messages:

- Patient Update
- Filling
- Cancelling
- Inactivate
- Reactivate

You can adjudicate claims to the fiscal plans first, print labels for dispensing, and then place the Rx in a queue for subsequent adjudication once the NBDIS server is back up.

1. The Rx plan sequence should have the fiscal plans listed first, then the NBDIS plan, followed by the Cash plan.



The screenshot displays the NBDIS software interface for a prescription. At the top, there are navigation tabs for Patient, Drug, Doctor, Workflow, Pickup, Drop-off, and Fill Rx. The main area is divided into several sections:

- Patient Search:** Name: Crawley, Sybil; Age: 16; Address: 55 Montague Road, Fredericton, NB; Phone: (506) 123-5871; Plan: ESI; Client ID: 557845.
- Drug Search:** Brand: Prevacid, 15mg; Generic: Lansoprazole, ABB (Abi); Pack: 30 Form CAP Sched 1; Purch: \$65.10; On-Hand: 0; DIN: 02165503; Min Qty: 0.
- Doctor Search:** Name: Dr. Monster, Cookie; Address: [blank]; City: [blank]; Prov: NB; Lic#: 800; Alt. Lic#: [blank].
- Prescription Details:** Sig: "1C"; TAKE 1 CAPSULE ONCE A DAY; Route of Admin: Oral; Dosage Form: Capsule, delayed Release (Enteri).
- Rx Plans (highlighted with a red box):**

Rx Plans	Plan Pays	Extra Info (F2 Edits)
ESI	Not Adjud.	
AHE	Not Adjud.	Inter: DB
NBDIS	Not Adjud.	DUE Only Inter: DB
Cash	Not Adjud.	Deduct: \$0.00
- Message:** Delivery Label will be printed.
- Right Sidebar:** Contains workflow options such as 'Make Rx Unfilled', 'Add Rx Image', 'Call Doctor', and 'View Workflow Detail'.

The status bar at the bottom shows the user is KP (Kroll Pharmacist), the system is DIS, and the date/time is 25/02/16 15:01:59.

- Select **F12 - Fill Rx** to initiate the adjudication of the prescription. The Rx will be sent to the fiscal plans first for payment. Below is an example for ESI and AHE.

Adjudication Response for ESI

View Rx Network

The claim was accepted

Errors, Warnings and Messages for **ESI**

**[D] Deductible Not Satisfied.**  
**Message 1**

Pricing Adjustments							Rx Total	78.90
	Cost	Markup	Fee	Mix Fee	SSC Fee	Total	Prev Paid	0.00
Submitted	65.10	7.81	5.99	0.00	0.00	78.90	Plan Pays	59.18
Accepted	65.10	7.81	5.99	0.00	0.00	78.90	Balance	19.72
Difference								

OK Trouble Cancel Rx

Adjudication Response for AHE

View Rx Network

The claim was accepted

Errors, Warnings and Messages for **AHE**

**[D] Deductible Not Satisfied.**  
**Message 1**

Pricing Adjustments							Rx Total	78.90
	Cost	Markup	Fee	Mix Fee	SSC Fee	Total	Prev Paid	59.18
Submitted	65.10	7.81	5.99	0.00	0.00	78.90	Plan Pays	14.79
Accepted	65.10	7.81	5.99	0.00	0.00	78.90	Balance	4.93
Difference								

There was a copay amount of 4.93

Adjust it, if desired, and press Enter.  OK Trouble Cancel Rx

- Once fiscal adjudication is complete, the prescription will be sent to NBDIS for clinical recording. Since the NBDIS server is down, the claim transmission will fail.



- Select **Send Later**. Labels will print automatically and the prescription will be queued.

## Sending Pending NBDIS Claims

When the NBDIS server is back up, any pending claims must be sent.

- Go to **F9 - Workflow > Pending Adjudication**.
- Click **Send/Review All** to send everything at once or choose **Send/Review for Current Patient** to send for a particular patient only.

F3 - Patient		F5 - Drug		F7 - Doctor		F9 - Workflow		F10 - Pickup		F11 - Drop-off		F12 - New Rx		Alt-X - Start	
Filter By All		<input type="checkbox"/> Show only DIS claims		space - Mark Rxs		Refresh								Workflow Actions	
Send/Review All		Send/Review for current Patient		M - Modify Rx(s)		Del - Delete								Rx's To Do	
														Get Work	
														Waiting for Pickup	
														Pending Adjudication (8)	
														Trouble (0)	
														Rx Counseling (0)	
														Medication Reviews (0)	
														Network Queue	
														Send All	
Err	Status	Transaction	Date	User	Rx Num	Patient	Brand Name	Message							
	Postponed	Rx Plan Claim	23/02/2016 11:44:55	KP	1000272	Justice, Jack Andre	Hyderm/ Iotriderm 1:1								
	Postponed	Rx Plan Claim	25/02/2016 14:09:07	KP	1000281	Justice, Lucy	Apo-Pindol 5mg								
	Communicatio	Patient Registry Nullify	25/02/2016 14:15:33	KP				There was a communicatio							
	Communicatio	Patient Registry Revise	25/02/2016 14:16:28	KP		Justice, Jack Andre		There was a communicatio							
	Not Sent	Rx Plan Claim	25/02/2016 14:22:29	KP	1000282	Justice, Jack Andre	Apo-Simvastatin 5mg								
	Communicatio	Retract Rx Order Stop	25/02/2016 14:29:20	KP	1000283	Justice, Susan	Accel-Pioglitazone 15mg	There was a communicatio							
	Communicatio	Rx Order Stop	25/02/2016 14:29:42	KP	1000284	Justice, Susan	Apo-Sumatriptan 50mg	There was a communicatio							
	Communicatio	Rx Order Stop	25/02/2016 14:34:03	KP	1000285	Bliss, Murphy	Prevacid 15mg	There was a communicatio							

## Appendix

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### Client Registry Data Standards

In order to maintain maximum effectiveness of the patient matching features within the Client Registry, each pharmacy must agree to capture the minimum data for the clients they register in their local systems.

Audits are performed daily in the Client Registry to ensure that the minimum data is captured by each patient record. If there are items that are deficient, the store will be assigned further work to remediate the problem. This could, for example, include updating the record with missing information or merging duplicate records (see Data Integrity Tasks section below). It is important to note that if not enough information is received on a patient file from the pharmacy this record will not be added to the Client Registry which means the information it contains cannot be used to provide care for that patient by the various clinical users of the Electronic Health Record (EHR) system.

It is important to also remember that records that are not a human patient (dogs, doctor's offices, etc.) must not be submitted to the provincial Client Registry.

The pharmacist or a designated pharmacy technician or pharmacy assistant will work with the Department of Health to resolve any Client Registry data integrity issues. Communication will be through online tools (Sharepoint), or through telephone communication.

Data Quality questions may be:

1. Verification of demographic data elements for patient for identity management;
2. Verification of drugs dispensed to the patient in case of patient records that require modification;
3. Identifying two or more records that may belong to the same client and must be merged (combined);
4. Requests to review/correct the Health Card Number or Date of Birth contained in the local pharmacy system.

The minimum data set must be captured using the approved standards. This will allow the Client Registry algorithm to score at the highest possible level and ensure that the client has only one record displaying in the Electronic Health Record (EHR) system for care providers to leverage at point of care.

The fields being transmitted are listed below along with details regarding data standards and minimum requirements.

MANDATORY DATA ELEMENT	FIELD TYPE AND VALID VALUES	STANDARDS
<b>Sex</b>	Text  M,F,  U – only valid for extremely rare cases	A code depicting the biological sex or gender of an individual.  - Valid values are: M = Male, F = Female, U = Unknown (Only valid if a test is processed that would not have a gender; ie; water test)
<b>Date of Birth</b>	YYYYMMDD	The calendar date on which an individual was born.
<b>Name</b>	Text  Last Name, FirstName MiddleName(s)  No spaces after comma; include space between given names if more than one.  Standard: 30 characters allowed for name field.	The complete legal name.  - For individuals with only one name, record it in the Last Name field.  - Hyphens and Apostrophes can be used if part of name (e.g. Smith-Jones, O'Regan).  - Initials are not to be used unless part of a legal name or the middle name cannot be entered in its entirety.  - Middle names are <b>not</b> to be truncated. Enter the names that fit in their entirety, and then if there is another name, enter the first initial.  Example for Frederick William Joseph Johnson: Johnson,Frederick William J  - Periods and numbers are not to be used.  - Titles or suffixes are not to be used (e.g. Mrs., Dr., Rev, Jr, Sr.).
<b>Address</b>		The primary street and/ or mailing address must be obtained.  -Unit Identifier (when Applicable)  -PO Box  -Civic Street Address  -Civic Street Number Suffix (when applicable)  -Civic Street Name  -Civic Street Type  -Street Direction (when applicable)

MANDATORY DATA ELEMENT	FIELD TYPE AND VALID VALUES	STANDARDS
City /Community name		Use Canada Post Community Name and corresponding Postal Code table.
Province/ Territory/State	AB = Alberta BC = British Columbia MB = Manitoba NB = New Brunswick NL = Newfoundland/Labrador NS = Nova Scotia NU = Nunavut ON = Ontario PE = Prince Edward Island QC = Quebec SK = Saskatchewan YT = Yukon	Use the standardized table following Canada Post guidelines.
Postal Code (PC) or Zip Code (ZC)	PC: ANA NAN ZC: 5 or 9 digits	-Valid by Post Canada or US Zip code. -See information for City/Community.
Telephone Number	### ## ## Example: 506 555 5555	-Record one telephone number on first line. -Number can be home or other number. -Mandatory to record area code with the number for all individuals including NB residents. -Telephone type will not be indicated (Home, Business etc.) -Brackets or hyphens are not to be used.
Health Insurance Number	Alphanumeric	Federal, provincial or territorial health insurance number for an individual. - hyphens are not to be used
Health Insurance Assigning Authority	Text	An abbreviation designating the authority responsible for the Health Insurance. (Federal, Provincial or Territorial)

## Data Integrity Tasks

Sharing information with the provincial systems requires a high degree of attention to data accuracy and completeness. The Client Registry is the system that links all patient records and allows a single patient view in the Electronic Health Record (EHR) system. As such, any discrepancies or insufficiencies as it relates to data coming from the pharmacies will lead to the generation of tasks. Tasks are simply the means by which the Department of Health and the stores can communicate to correct or complete data to ensure an appropriate linkage between patient records. This process ensures the safety of patients by ensuring patient information is accurate and complete when presented in the EHR.

### Potential Duplicate

This type of task occurs when multiple records in the pharmacy system closely resemble the same patient. The task is resolved by merging records in the pharmacy system and communicating a merge to the Client Registry.

### Potential Overlay

Identifies a record within the pharmacy system in which the patient's data has changed significantly and appears to not be the same person. This would lead to believe that a record was opened and someone mistakenly over wrote one patient's information with another patient's information.

Task is resolved by reviewing patient information in the pharmacy system to ensure information is corrected and working closely with the Department of Health to correct data in Client Registry to ensure proper display in the EHR for care providers to use.

Because of the high risk to patient safety, this type of issue is handled immediately and will lead the Department of Health to a call the pharmacy as soon as it is detected. Before resolution, this record is locked within the provincial EHR. The locking of the record is essential to prevent clinicians from making clinical decisions on information that may not belong to the patient.

### Review Identifier

This is a task that identifies records within the same pharmacy system that have a high potential that a client could be incorrectly sharing Health Insurance number with another record. This task is identified by comparing records and tracking duplication of identifiers.



A Review Identifier could signal that it is the same person, or it could be that the Provincial Health Insurance Number was recorded on the wrong client record.

Task is resolved by verifying patients' Health Insurance number in pharmacy system and removing the HCN from the incorrect patient's record; or if they are the same patient, merging the records in the source system.

## More Information Required or Custom Task

During the normal course of auditing and monitoring data quality and completeness, the Department of Health may identify data quality issues. For example, a record from the pharmacy may not be linked to the provincial patient record because of a missing HCN or inconsistent address and/or phone in comparison to other high scoring records. If that information is clarified it may allow the Department of Health to perform a manual linkage. In such cases, the Department of Health will create a manual task to obtain additional information and/or data correction in the pharmacy system. Those types of tasks include:

- Confirmation of missing or incorrect HCN, address, and/or phone.
- Request that information is corrected on the patient file.
  - Correct a date of birth or records that do not follow the name standards.
  - Add the correct HCN to a patient's file.

## Merging a Potential Duplicate

As explained above, duplicates within the pharmacy system lead to the creation of a Data Integrity Task from the Client Registry as it becomes impossible for the system to understand which of the records from the pharmacy should be associated with the patient record provincially. A duplicate therefore generates a "Potential Duplicate" task for the store to resolve. It has been noted that stores may have difficulties merging within their pharmacy system but this is essential after the connection to DIS.

Although the below should likely not be detailed within the Software Training Guide and is part of the Department of Health's Pharmacy Task Training, it is important to understand the process steps related to merging in DIS to ensure this knowledge is well integrated within the Software Training Guide:

1. The Daily DIS Tasks Report is generated by the pharmacy location for all DIS source records by an automated process in the Client Registry and is updated in the Pharmacies Daily Tasks

worklist on Sharepoint. New worklist tasks added to the worklist for their pharmacy, based on the setup for that pharmacy (by location id) in the EHR User Log.

2. On a daily basis, the pharmacy system user (pharmacist or pharmacy technician) trained to do so reviews the tasks worklist for potential duplicate tasks.
3. For each potential duplicate record reported, you will retrieve the customer records in the pharmacy system and investigate.
4. If only one record exists, you must determine if the records have already been merged in the pharmacy system.
5. If the records have not been merged, you must determine if they are duplicate records within the pharmacy application.
6. If they are duplicate records, they will merge the records in the pharmacy system and a merge message will be sent electronically to the Client Registry.
7. The pharmacy system user will update the task resolution in the worklist as “Merged at Pharmacy”.
8. The Department of Health reviews worklist tasks resolved as “Merged at Pharmacy”.
9. The Department of Health confirms the resolution.
10. If the record has not been merged, the Department of Health will confirm the surviving record with the pharmacy system user to then perform a manual merge in the Client Registry.
11. If you determine they are either not a duplicate record or they do not have enough information on the records to make a determination, update the worklist task as “Not Same Person” or “Not Enough Info” respectively.
12. The Department of Health reviews worklist tasks resolved as “Not Same Person” or “Not Enough Info”.
13. The Department of Health will defer the task. The potential duplicate will no longer appear on reports until one of the DIS source records has an additional update, at which time they will be re-compared.

## **Kroll Helpdesk Information**

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