



# Patient and Physician Letters

January 2020

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## Patient and Physician Letters

Patient and physician letters are used to inform patients that they qualify for a medication review session, and to inform physicians that one of their patients has undergone a medication review session. See the medication review user guide on our website for information about conducting medication reviews in Kroll.

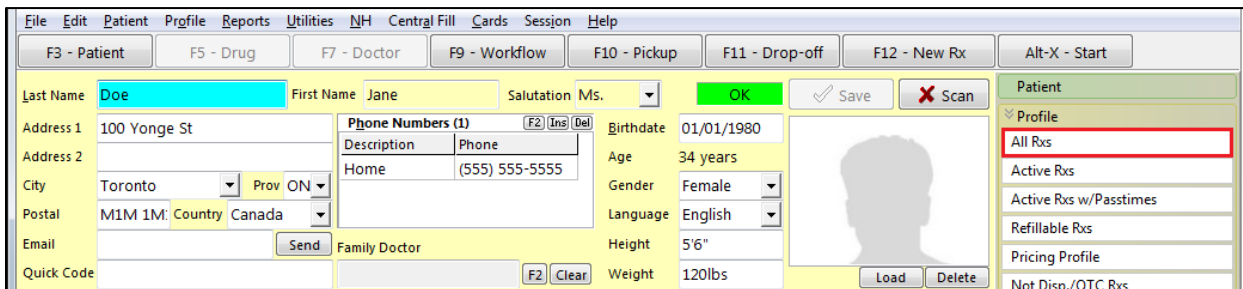
This user guide explains how to configure your system for patient and physician letter prompting, how to edit a letter template, and how to generate patient and physician letters.

### Patient Letters

Patient letters can be generated manually from the patient profile or automatically during workflow. This section explains how to generate a patient letter both manually and automatically during prescription filling.

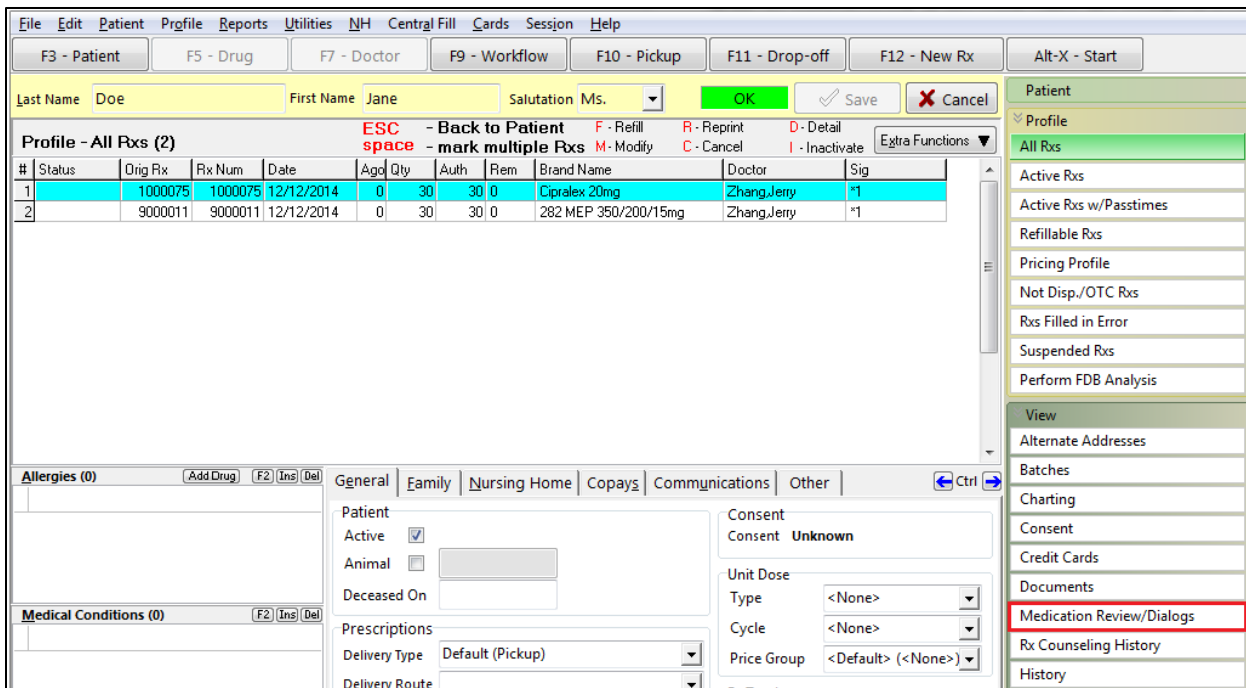
#### Manually Generating a Patient Letter

1. Call up the patient profile and select **All Rx's** from the right navigation pane.



File Edit Patient Profile Reports Utilities NH Central Fill Cards Session Help	
F3 - Patient F5 - Drug F7 - Doctor F9 - Workflow F10 - Pickup F11 - Drop-off F12 - New Rx Alt-X - Start	
Last Name: Doe	First Name: Jane Salutation: Ms. <span>OK</span> <span>Save</span> <span>Scan</span>
Address 1: 100 Yonge St	Phone Numbers (1) <span>F2</span> <span>Ins</span> <span>Del</span>
Address 2:	Description: Phone
City: Toronto Prov: ON	Home: (555) 555-5555
Postal: M1M 1M1 Country: Canada	Birthdate: 01/01/1980
Email: <span>Send</span>	Age: 34 years
Quick Code: <span>F2</span> <span>Clear</span>	Gender: Female
	Language: English
	Height: 5'6"
	Weight: 120lbs <span>Load</span> <span>Delete</span>
	Family Doctor: <span>F2</span> <span>Clear</span>
	<b>Patient</b>
	Profile
	All Rx's
	Active Rx's
	Active Rx's w/Passtimes
	Refillable Rx's
	Pricing Profile
	Not Disp./OTC Rx's

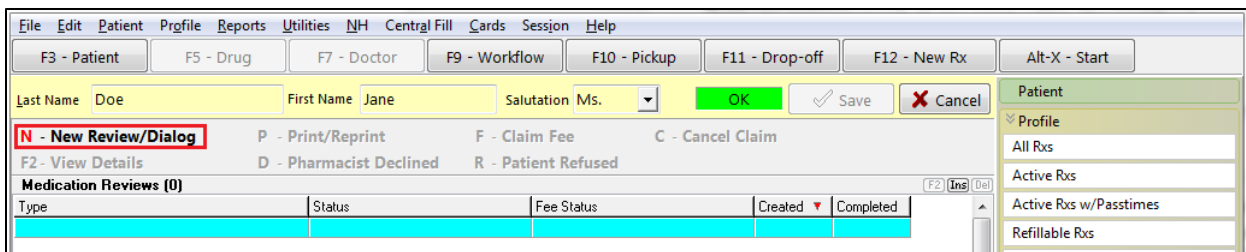
2. Select **Medication Review/Dialogs** from the right navigation pane.



The screenshot shows the 'Profile - All Rxs (2)' window. The right-hand navigation pane is open, and 'Medication Review/Dialogs' is highlighted in red. The window displays patient information (Last Name: Doe, First Name: Jane, Salutation: Ms.) and a table of prescriptions. Below the table, there are sections for Allergies, Medical Conditions, and various patient details like Consent and Unit Dose.

#	Status	Orig Rx	Rx Num	Date	Age	Qty	Auth	Rem	Brand Name	Doctor	Sig
1		1000075	1000075	12/12/2014	0	30	30	0	Cipralex 20mg	Zhang, Jerry	*1
2		9000011	9000011	12/12/2014	0	30	30	0	282 MEP 350/200/15mg	Zhang, Jerry	*1

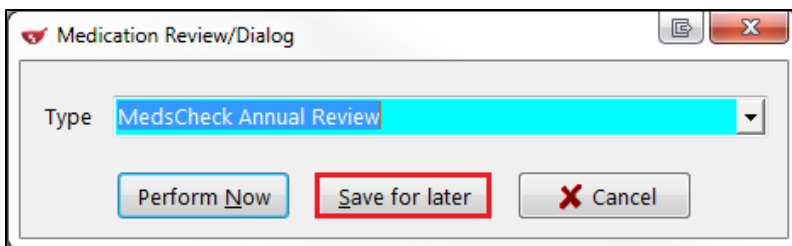
3. Select **N - New Review/Dialog**.



The screenshot shows the 'Medication Reviews (0)' window. The 'N - New Review/Dialog' option is highlighted in red. The window displays a table with columns for Type, Status, Fee Status, Created, and Completed. Below the table, there are sections for Patient, Consent, and Unit Dose.

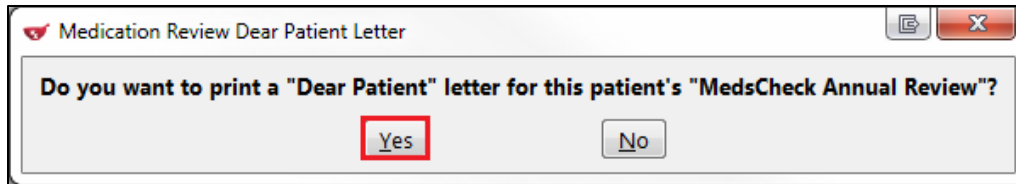
Type	Status	Fee Status	Created	Completed

4. Select the appropriate review type from the **Type** menu and click **Save for later**.



The screenshot shows the 'Medication Review/Dialog' dialog box. The 'Type' dropdown menu is set to 'MedsCheck Annual Review'. The 'Save for later' button is highlighted in red. The dialog box also contains 'Perform Now' and 'Cancel' buttons.

5. A prompt will appear asking if you would like to print a "Dear Patient" letter for the selected review type. Answer **Yes**.

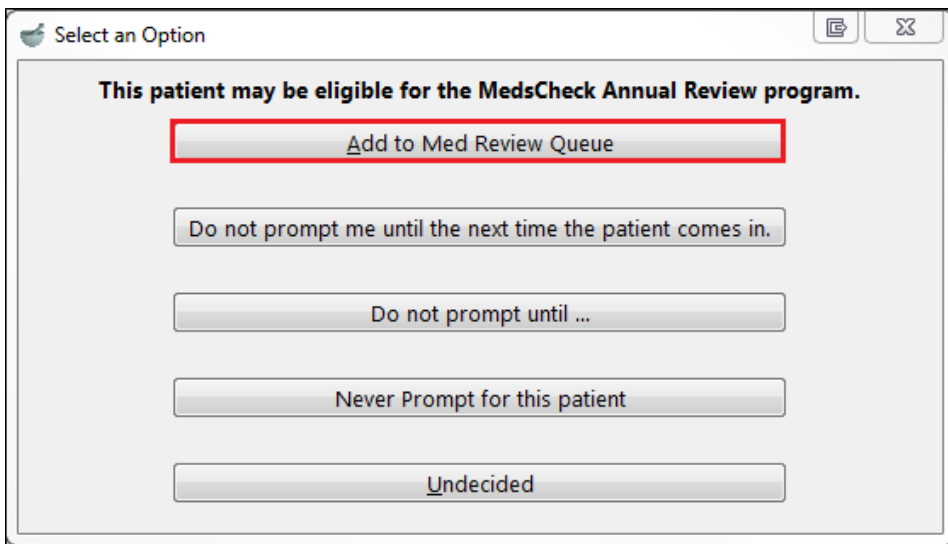


The patient letter will generate.

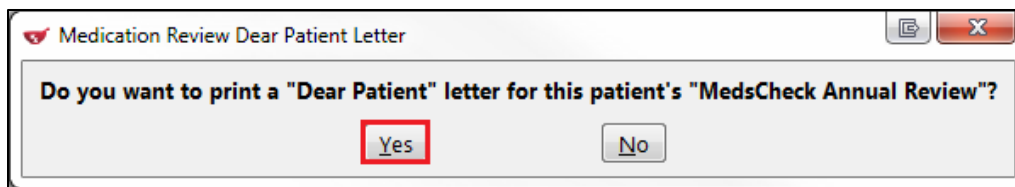
## Generating a Patient Letter during Prescription Filling

**NOTE:** In order to use patient letter functionality during prescription filling, the 'Prompt for Medication Review Patient Letter' and 'Print Medication Review Patient Letter' workflow actions to be inserted in the appropriate workflows. Please contact Kroll Support at 1-800-263-5876 so one of our agents can configure your system for patient letters.

1. Call up the **F12 - New Rx** screen and complete the patient, drug, prescriber, and dispensing fields. Click **F12 - Fill Now**.
2. If the patient qualifies for a medication review, you will be prompted to add the patient to the medication review queue. If the patient agrees to the medication review, select **Add to Med Review Queue**.

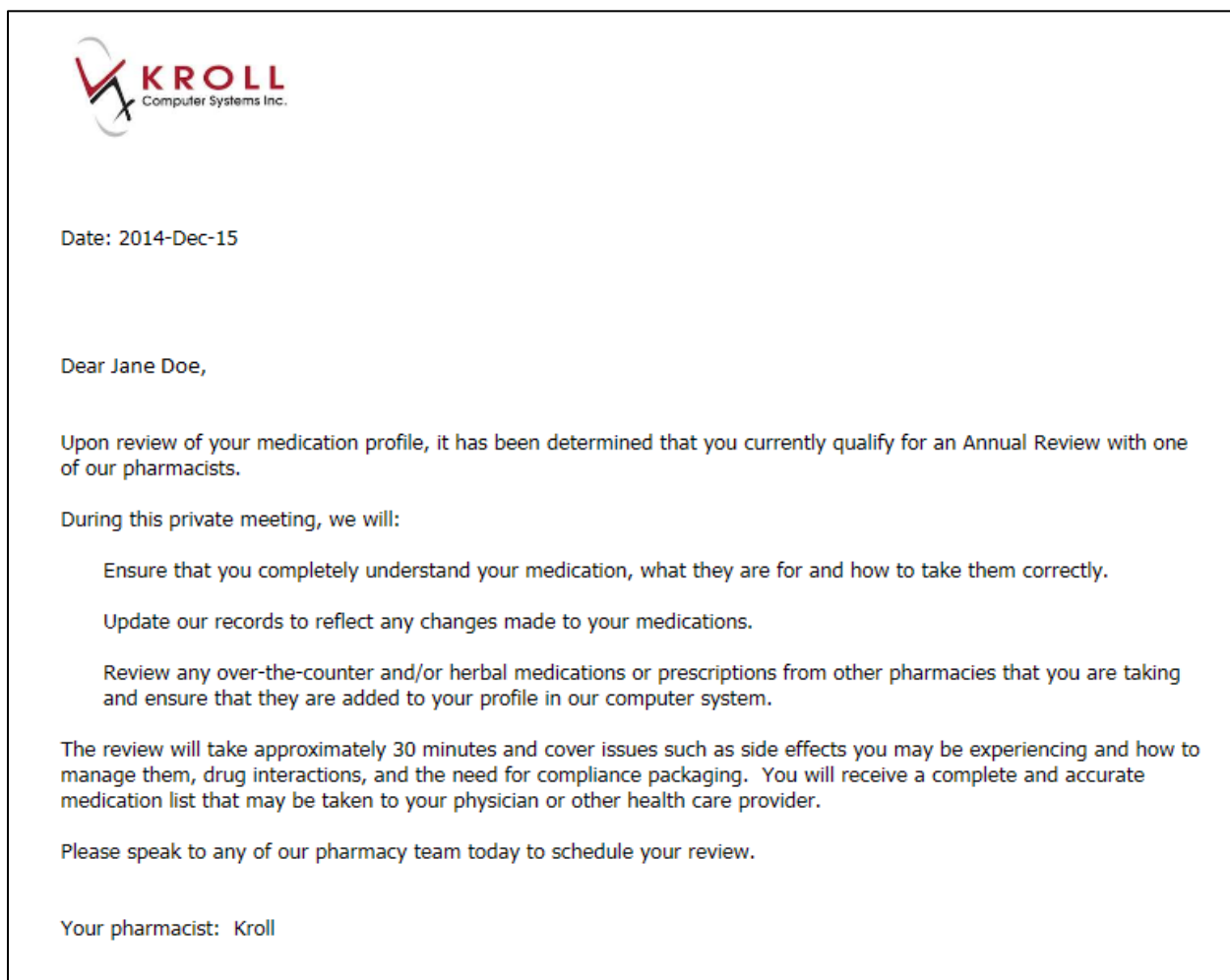


3. A prompt will appear asking if you want to print a “Dear Patient” letter. Answer **Yes**.



The patient letter will generate.

## Sample Patient Letter



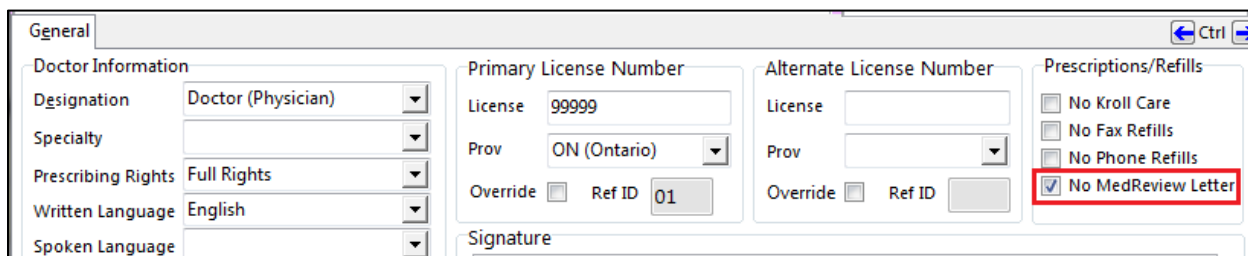
## Physician Letters

This section explains how to generate physician letters. Note that physicians must have a fax number listed in their doctor profile in order to receive physician letters.

### Configuring 'No MedReview Letters'

Physicians are automatically configured to receive physician letters; however, if a physician does not want to receive physician letters, he or she can be unenrolled from the service.

1. Call up the **F7 - Doctor** profile for the selected physician.
2. Place a checkmark next to **No MedReview Letter**.



General		Primary License Number	Alternate License Number	Prescriptions/Refills
<b>Doctor Information</b> Designation: Doctor (Physician)		License: 99999	License:	<input type="checkbox"/> No Kroll Care
Specialty:		Prov: ON (Ontario)	Prov:	<input type="checkbox"/> No Fax Refills
Prescribing Rights: Full Rights		Override <input type="checkbox"/> Ref ID: 01	Override <input type="checkbox"/> Ref ID:	<input type="checkbox"/> No Phone Refills
Written Language: English		Signature:		<input checked="" type="checkbox"/> <b>No MedReview Letter</b>
Spoken Language:				

## Generating a Physician Letter

1. Conduct a medication review session with the patient. When you are finished, click **Finalize Review**.

**MedsCheck Annual Review** Reviewed With **Doe, Jane (In Person)** F2

Patient: **Doe, Jane** Address: **100 Yonge St**

Birth: **01/01/1980** **34 years** **Female** Plan: **ODB** Client ID: **123** Phone: **Home** **(555) 555-5555**

Allergies: Conditions:

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

Pharmacist Comments

Review

- Print Medication Review
- Select Rx's for Review
- Select Doctors for Letter
- View Follow Ups

View

- Patient Charting
- Patient Documents
- Patient Med Reviews (2)

Profile

- All Rxs
- Active Rxs
- Active Rxs w/Pasetimes
- Pricing Profile
- Not Disp/OTC Profile

Questions Language

- English
- Francais

Save for Later Finalize Review

2. If you have physician letter prompting enabled, a doctor letter selection screen will appear.
  - If you do not have physician letter prompting enabled and you want to send a physician letter, click **Select Doctors for Letter** from the right navigation pane of the medication review screen.

**MedsCheck Annual Review** Reviewed With **Doe, Jane (In Person)** F2

Patient: **Doe, Jane** Address: **100 Yonge St**

Birth: **01/01/1980** **34 years** **Female** Plan: **ODB** Client ID: **123** Phone: **Home** **(555) 555-5555**

Allergies: Conditions:

Review

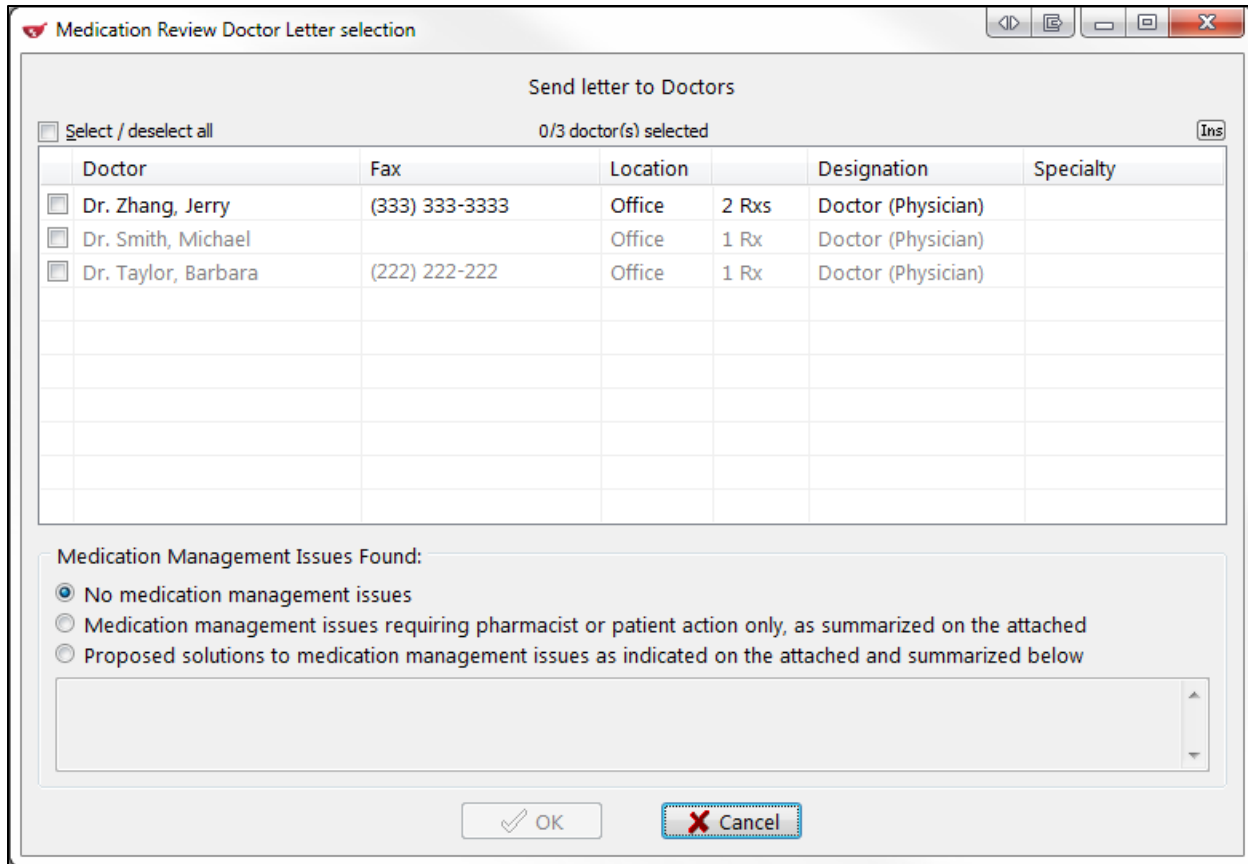
- Print Medication Review
- Select Rx's for Review
- Select Doctors for Letter
- View Follow Ups

View

- Patient Charting
- Patient Documents



- The **Medication Review Doctor Letter** selection screen will appear. This screen lists the doctors who prescribed the Rxs selected for the medication review.



Medication Review Doctor Letter selection

Send letter to Doctors

Select / deselect all      0/3 doctor(s) selected      **Ins**

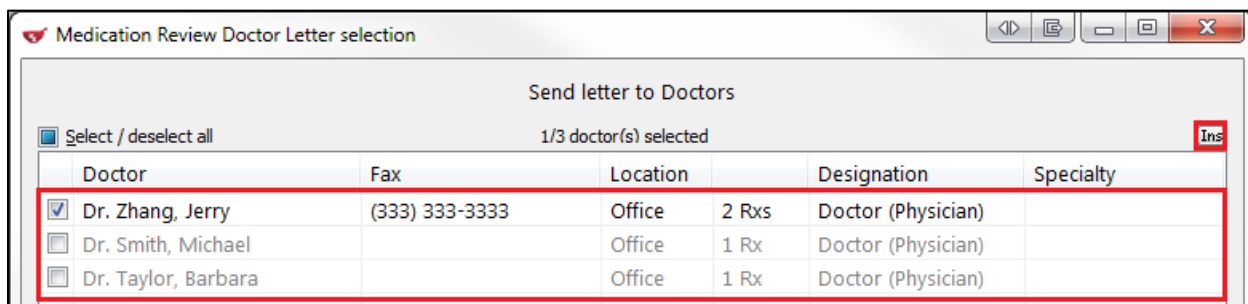
Doctor	Fax	Location		Designation	Specialty
<input type="checkbox"/> Dr. Zhang, Jerry	(333) 333-3333	Office	2 Rxs	Doctor (Physician)	
<input type="checkbox"/> Dr. Smith, Michael		Office	1 Rx	Doctor (Physician)	
<input type="checkbox"/> Dr. Taylor, Barbara	(222) 222-222	Office	1 Rx	Doctor (Physician)	

Medication Management Issues Found:

No medication management issues  
 Medication management issues requiring pharmacist or patient action only, as summarized on the attached  
 Proposed solutions to medication management issues as indicated on the attached and summarized below

- Place a checkmark next to the doctor(s) you want the letter sent to. To add a doctor to the list, click **Ins** and perform a doctor search. The doctor will be added to the **Medication Review Doctor Letter** selection screen.



Medication Review Doctor Letter selection

Send letter to Doctors

Select / deselect all      1/3 doctor(s) selected      **Ins**

Doctor	Fax	Location		Designation	Specialty
<input checked="" type="checkbox"/> Dr. Zhang, Jerry	(333) 333-3333	Office	2 Rxs	Doctor (Physician)	
<input type="checkbox"/> Dr. Smith, Michael		Office	1 Rx	Doctor (Physician)	
<input type="checkbox"/> Dr. Taylor, Barbara		Office	1 Rx	Doctor (Physician)	

- b) Doctors that appear in grey text are not eligible to receive physician letters. This could be because ‘**No MedReview Letter**’ is enabled in the doctor profile or because there is no fax number listed in the doctor profile. Place the cursor over the doctor’s name to see the reason why the doctor cannot be selected.

Doctor	Fax	Location		Designation	Specialty
<input checked="" type="checkbox"/> Dr. Zhang, Jerry	(333) 333-3333	Office	2 Rxs	Doctor (Physician)	
<input type="checkbox"/> Dr. Smith, Michael		Office	1 Rx	Doctor (Physician)	
<input type="checkbox"/> Dr. Taylor, Barbara NO FAX number		Office	1 Rx	Doctor (Physician)	

Doctor	Fax	Location		Designation	Specialty
<input checked="" type="checkbox"/> Dr. Zhang, Jerry	(333) 333-3333	Office	2 Rxs	Doctor (Physician)	
<input type="checkbox"/> Dr. Smith, Michael		Office	1 Rx	Doctor (Physician)	
<input type="checkbox"/> Dr. Taylor, Barbara		Office	1 Rx	Doctor (Physician)	

Doctor DOES NOT allow Medication Review Letter

- c) Select the appropriate medication management issues option. If you select ‘**Proposed solutions...**’, enter a summary of the proposed solutions to the medication management issues in the text box below.

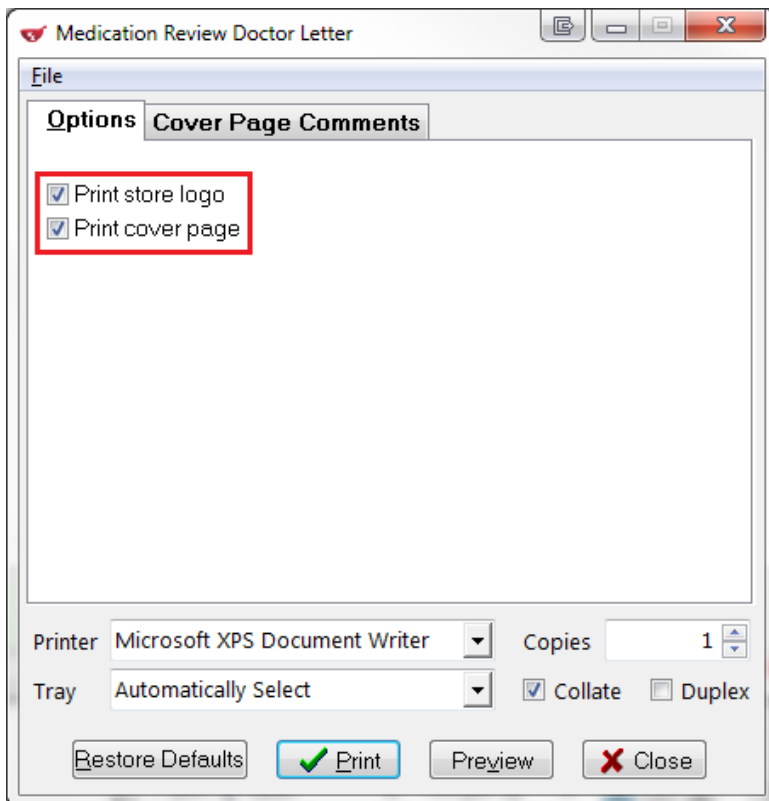
Medication Management Issues Found:

No medication management issues  
 Medication management issues requiring pharmacist or patient action only, as summarized on the attached  
 Proposed solutions to medication management issues as indicated on the attached and summarized below

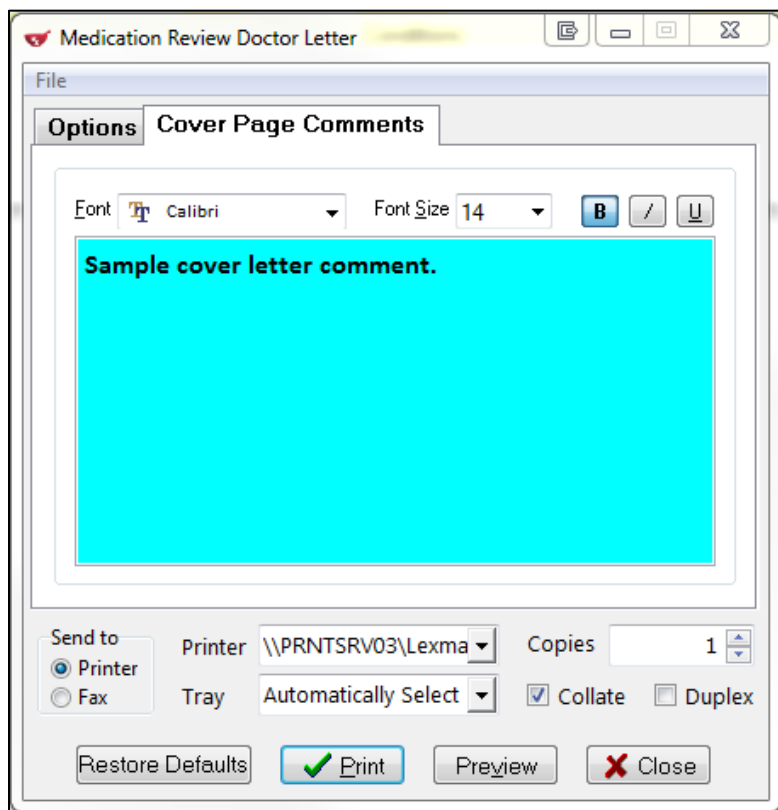
text...

4. Click **OK**.
5. The **Medication Review Doctor Letter** print form will appear.

- Check **Print store logo** if you want your pharmacy's logo to print on the letter and **Print cover page** if you would like the letter to include a cover page; a **Cover Page Comments** tab will appear when this option is selected.



- Enter any comments you want to appear on the cover page in the **Cover Page Comments** tab.



- Click **Preview** to preview the letter or **Print** to print it.

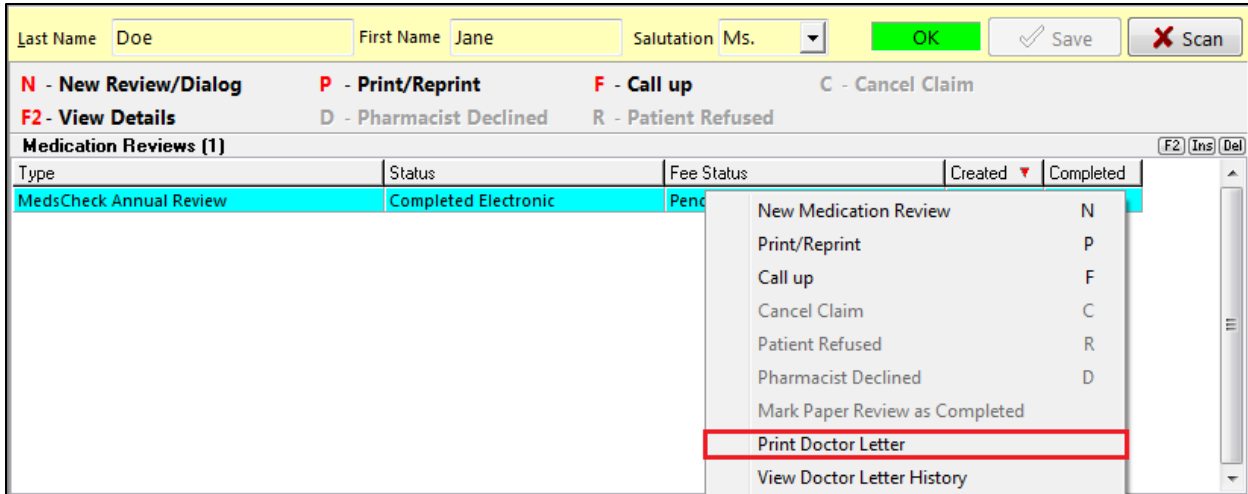
1. Complete the review process as per usual procedures. Once complete, the physician letter will appear in the **Outbound Fax** screen.

The screenshot shows the TELUS Health software interface. At the top, there is a menu bar with options: File, Edit, Reports, Utilities, NH, Central Fill, Cards, Session, Help. Below the menu bar are navigation tabs: F3 - Patient, F5 - Drug, F7 - Doctor, F9 - Workflow, F10 - Pickup, F11 - Drop-off, F12 - New Rx, and Alt-X - Start. The main interface is divided into several sections. On the left, there are buttons for 'Modify Rx', 'Reprint Rx', 'Cancel Rx', 'Modify Specific Rx #', 'Reprint Specific Rx #', and 'Counsel Rx'. Below these buttons is the Kroll Dispensary logo. The central area features a 'Show Pending' dropdown and a table titled 'Outbound Faxes (1)'. The table has columns for 'Date Sent', 'Sent To', and 'Status'. One row is highlighted in blue, showing '13/11/2014 15:06', '(122) 333-6688', and 'Waiting For Action Date'. To the right of the table is a 'New Fax' button. The bottom right section displays a preview of a faxed letter. The letter is addressed to 'To: (122) 333-6688' and 'On: 13/11/2014 15:06'. The status is 'Waiting For Action Date'. The letter content includes a header with the Kroll logo, a salutation 'Dear Mr. Smith, my', and a body of text that is partially obscured by a redacted area. The letter concludes with 'Sincerely,' and 'Dr. Pharmacy'.

## Generating a Physician Letter for a Completed Medication Review

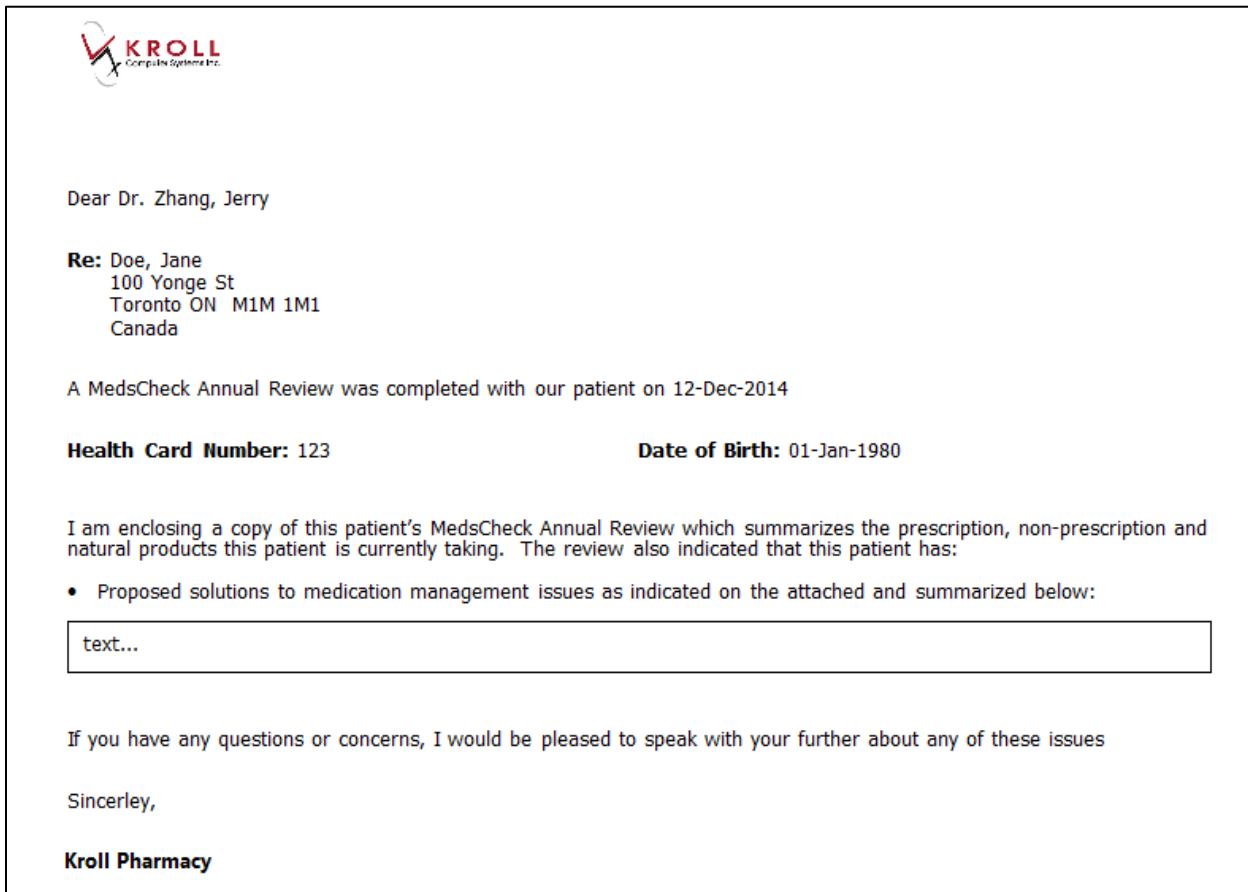
1. Call up the patient profile and select **All Rx's** from the right navigation pane.
2. Select **Medication Review/Dialogs** from the right navigation pane.

- Right-click the medication review you want to reprint the physician letter for and select **Print Doctor Letter**.



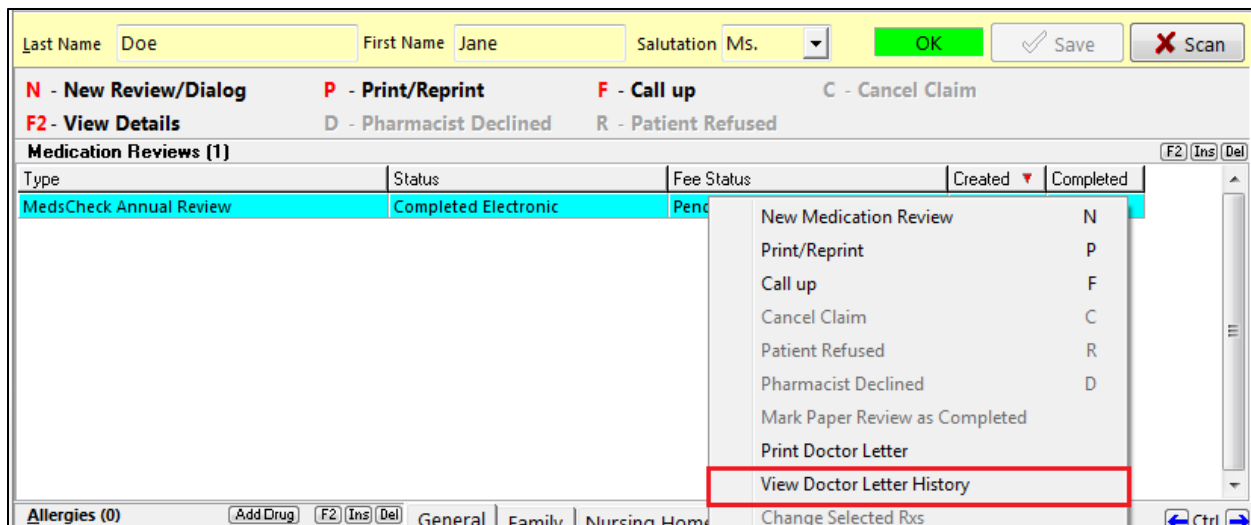
- Complete steps 3-5 of the [Generating a Physician Letter](#) section.

## Sample Physician Letter



## Viewing Physician Letter History

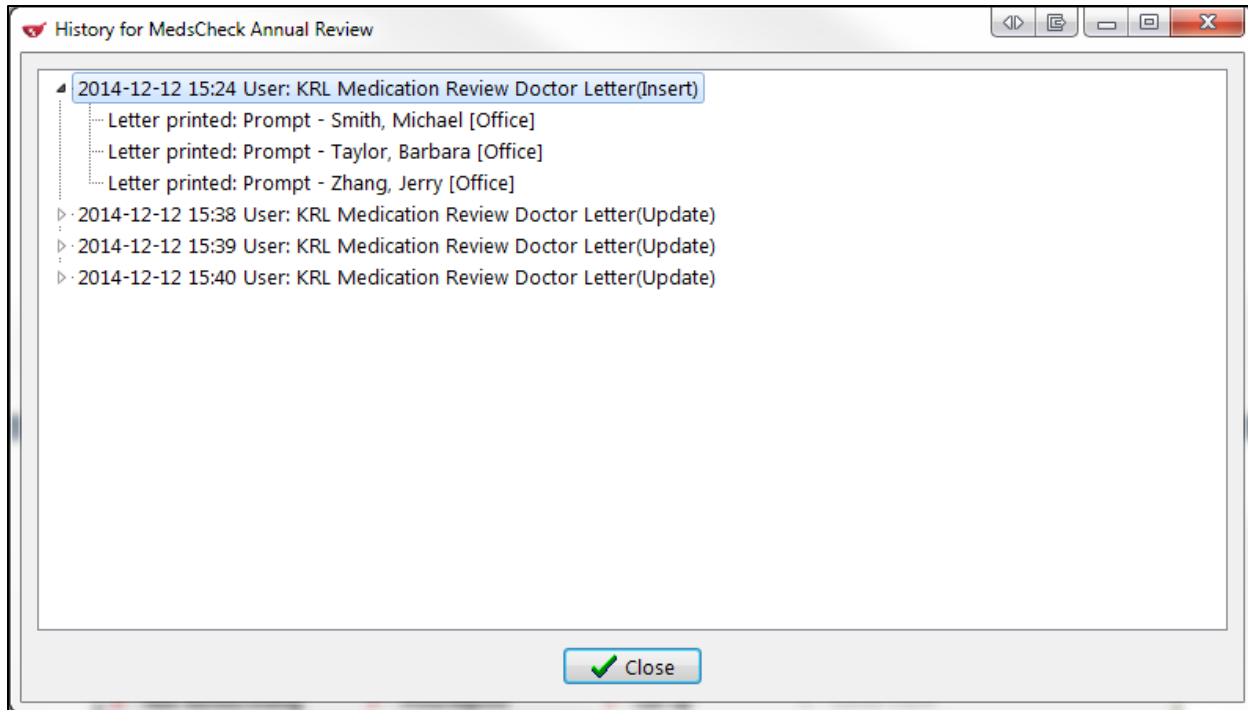
1. Call up the patient profile and select **All Rx's** from the right navigation pane.
2. Select **Medication Review/Dialogs** from the right navigation pane.
3. Right-click the medication review you want to view physician letter history for and select **View Doctor Letter History**.



The screenshot shows a software interface for patient medication reviews. At the top, there are input fields for 'Last Name' (Doe), 'First Name' (Jane), and 'Salutation' (Ms.), along with 'OK', 'Save', and 'Scan' buttons. Below this is a legend for review actions: N - New Review/Dialog, P - Print/Reprint, F - Call up, C - Cancel Claim, F2 - View Details, D - Pharmacist Declined, and R - Patient Refused. The main area is titled 'Medication Reviews (1)' and contains a table with columns for Type, Status, Fee Status, Created, and Completed. A single row is visible: 'MedsCheck Annual Review' with status 'Completed Electronic' and fee status 'Pend'. A right-click context menu is open over this row, listing various actions. The 'View Doctor Letter History' option at the bottom of the menu is highlighted with a red rectangle.

Type	Status	Fee Status	Created	Completed
MedsCheck Annual Review	Completed Electronic	Pend		

- The **History for MedsCheck Annual Review** screen will appear, showing all history items associated with the review. Click a history item to view more information.



- Click Close to exit the History for MedsCheck Annual Review screen.

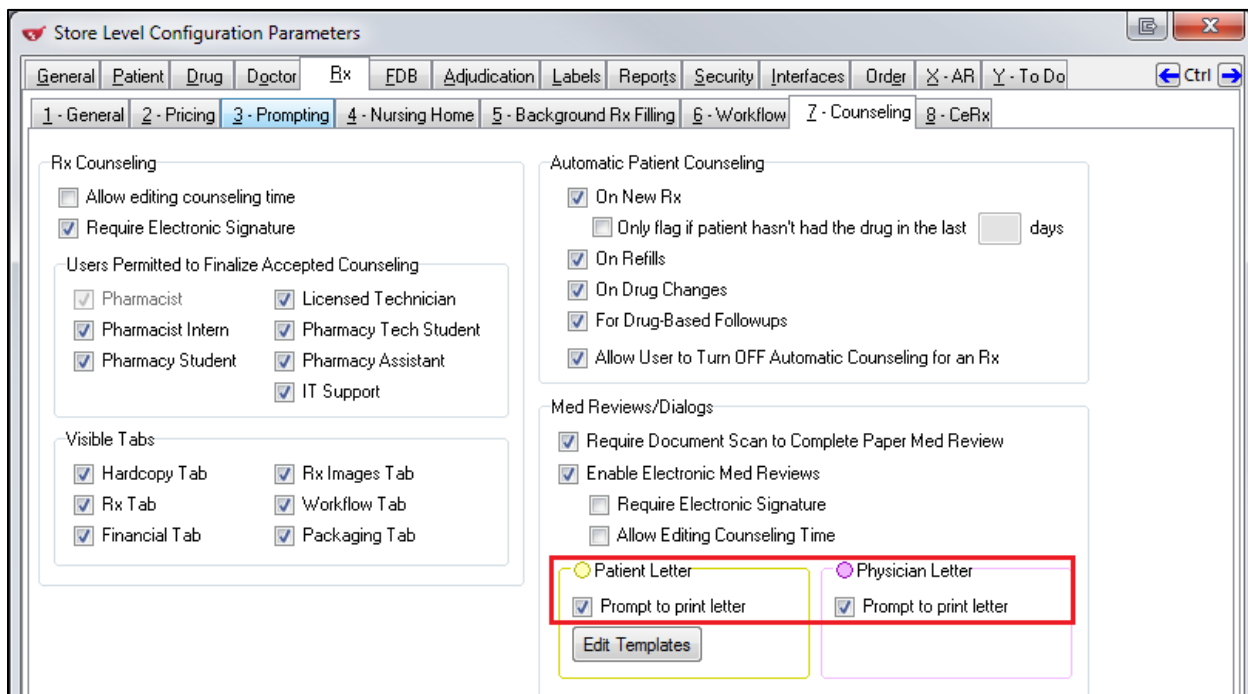


## Configuration

This section explains how to configure your system for patient letter and physician letter prompting and how to edit the letter templates.

### Enabling Letter Prompting

1. From the **Alt-X Start** screen, go to **File > Configuration > Store > Rx > Counseling**.
2. Check 'Prompt to print letter' to enable prompting for patient letters and/or physician letters.



The screenshot shows the 'Store Level Configuration Parameters' window with the '3 - Prompting' tab selected. The 'Rx Counseling' section includes options for 'Allow editing counseling time' (unchecked) and 'Require Electronic Signature' (checked). The 'Automatic Patient Counseling' section has several options checked, including 'On New Rx', 'On Refills', 'On Drug Changes', and 'For Drug-Based Followups'. The 'Med Reviews/Dialogs' section has 'Require Document Scan to Complete Paper Med Review' and 'Enable Electronic Med Reviews' checked. A red box highlights the 'Patient Letter' and 'Physician Letter' sections, both of which have the 'Prompt to print letter' checkbox checked. An 'Edit Templates' button is visible below the Patient Letter section.

## Editing Patient Letter Templates

1. From the **Alt-X Start** screen, go to **File > Configuration > Store > Rx > Counseling**.
2. Click **Edit Templates**.

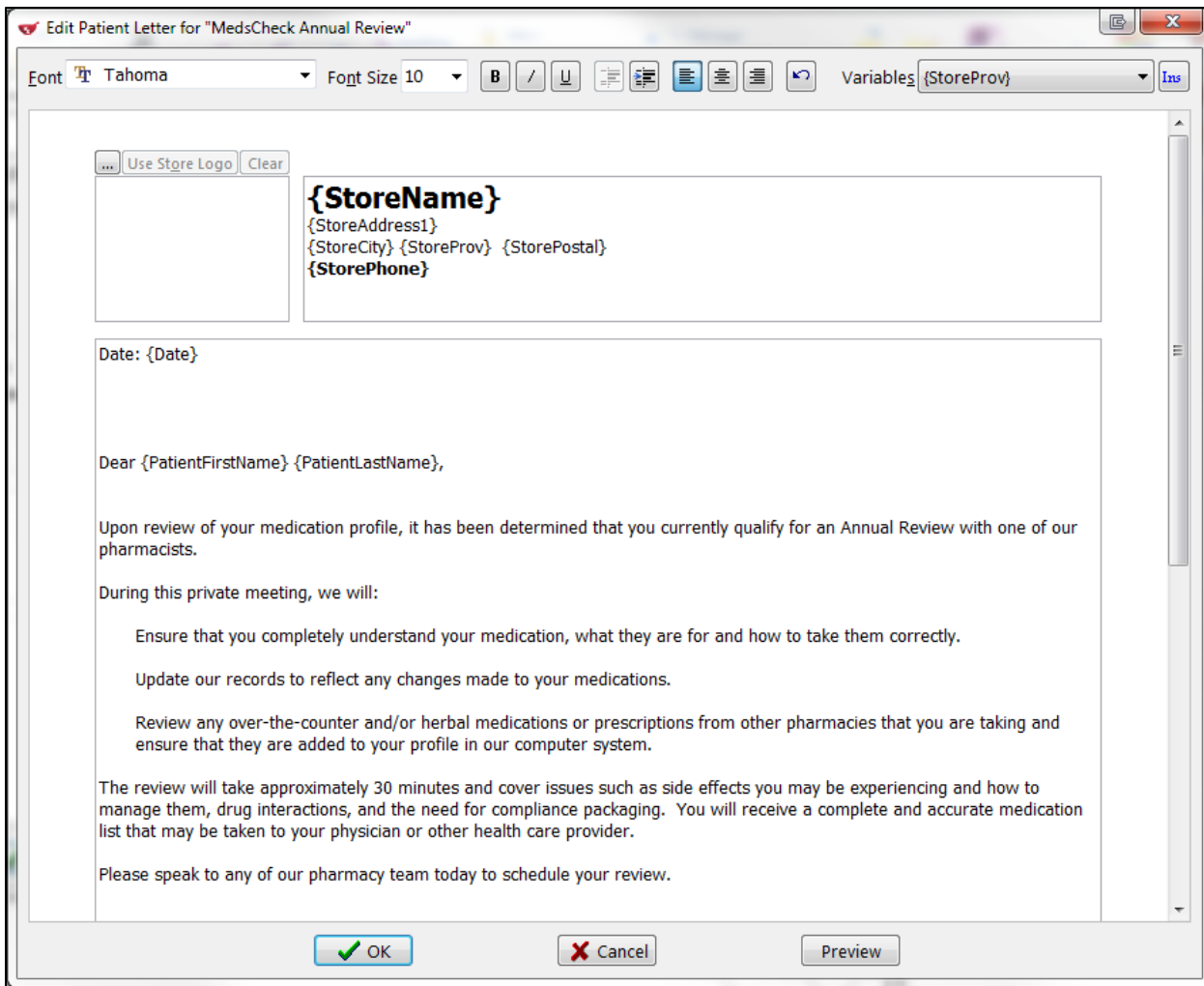
The screenshot shows the 'Store Level Configuration Parameters' window with the 'Counseling' tab selected. The 'Patient Letter' section is highlighted in yellow, and the 'Edit Templates' button is highlighted in red.

3. Select the letter template you want to edit and click **F2**, or press the **F2** key on your keyboard.

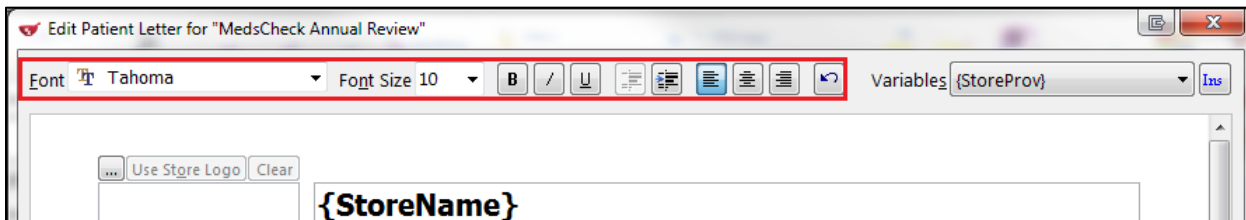
The screenshot shows the 'Medication Review Patient Letters' window. The 'MedsCheck Annual Review' row is highlighted in cyan, and the 'F2' key is highlighted in red.

Medication Review	Letter Changed On
General Counseling	09/12/2014 18:35:41
MedsCheck Annual - LTC Home Resident	09/12/2014 18:35:38
MedsCheck Annual At Home Assessment Summary	09/12/2014 18:35:39
<b>MedsCheck Annual Review</b>	<b>09/12/2014 18:35:38</b>
MedsCheck Diabetes Annual Assessment	09/12/2014 18:35:39
MedsCheck Diabetes Follow-up Assessment	09/12/2014 18:35:39
MedsCheck Follow-up - Hospital Discharge	09/12/2014 18:35:38
MedsCheck Follow-up - Pharmacist's Decision	09/12/2014 18:35:38
MedsCheck Follow-up - Physician / RN(EC) Referral	09/12/2014 18:35:38
MedsCheck Follow-up - Planned Hospital Admission	09/12/2014 18:35:38
MedsCheck Quarterly Monitoring - LTC Home Resident	09/12/2014 18:35:39

4. The selected letter template will appear.



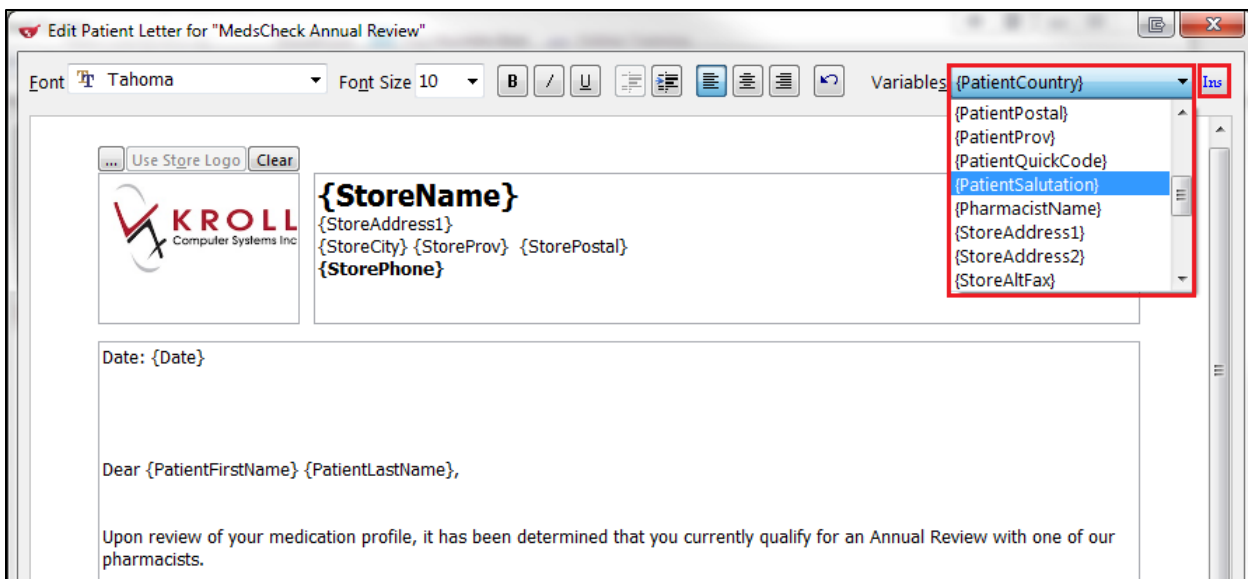
a) Use the text editing tools along the top of the screen to make any necessary formatting changes.



- b) Click ‘...’ to add a store logo. Locate the logo file in your local system and click **Open**. Or, if you have a store logo loaded in **Reports > General**, click **Use Store Logo**.



- c) To add variable text, place your cursor where you would like the variable text to appear in the letter. Select the variable type from the **Variables** menu and click **Ins**.



- d) Make any necessary changes to the body text.
- 5. Click **Preview** to preview the letter and **OK** to save it.
- 6. Click **Save** to close the **Medication Review Patient Letters** screen.