



Kroll Version 10 Service Pack 25 Payments

Feature Release Notes

April 2022

Table of Contents

Kroll Version 10 Service Pack 25 Payments Feature Release Notes	3
Calendar	3
[KRL-5911] Virtual Consultation Waiting Room has been added to the Calendar	3
Canada Post	3
[KRL-6044] Extend the Kroll Canada Post interface to poll Canada Post for status changes on a delivery order so the patient is notified when it is delivered.....	3
Configuration	3
[KRL-6344] Added a Kroll Config option to enable/disable XML patient import.....	3
Fill	4
[KRL-5820] Kroll changes to support "privileged caregiver".....	4
[KRL-6114] Provide the ability to better document “do not counsel” situations.....	4
Payments	4
[KRL-5599] Added a new screen for Accounts Receivable Electronic Payment	4
[KRL-5755] Added ToDo type in patient followup for manual payments.....	5
[KRL-5829] Users can now make a Credit Card or an Electronic Funds Transfer (EFT) to prepay an AR account	5
[KRL-5837] Users are now able to pickup an Rx if the Rx has not been paid and is charged to a prepay AR account	6
[KRL-5919] Moved electronic payment values for Electronic Funds Transfer into Configuration>Store	6
[KRL-5920] Added a new EFT strategy for BMO	6
[KRL-5921] Added a new tab “Credit Cards/EFT” to the patient AR profile for both post pay and prepay accounts	7
[KRL-5924] Only post pay Accounts Receivable/EFT accounts are supported when an electronic payment batch is created	7
[KRL-5973] Added a menu option “Charge to Account” on the F12-Rx Fill window	8
[KRL-6079] Added a new field "Printing Mode" to AR profile	8
[KRL-6082] Added a new tab for “Electronic Payments”	8
[KRL-6122] Changed prepay charges from AR to always create a new invoice based on the work order	9
[KRL-6129] Added a count in brackets for Accounts toolbar on patient edit screen. On the patient card, we now display the total number of Accounts on the right “View” menu	9
[KRL-6193] Made changes to the “Make AR Payment” window	9
[KRL-6198] Changes to the prepay AR account and OCM.....	10
[KRL-6232] Added “Void Payment” for electronic payments.....	11
[KRL-6285] Added the ability for the primary account holder, who is not linked to the pharmacy, to register dependants in PharmaConnect	11

[KRL-6341] Deleting pending electronic payments is now allowed..... 11

[KRL-6430] For Prepay AR Accounts added a button to manually trigger an OCM notification 11

[KRL-6444] Allow Deletion of Patient Credit Cards if it has been used previously for an Electronic Payment12

[KRL-6457] Create a bulletin for PharmaConnect when AR account has something to pay 13

Delivery Order..... 13

[KRL-6367] Changed delivery order waybill field from disabled to read only 13

[KRL-6378] Queue up a delivery order OCM shipped message when a delivery order has been shipped.... 14

[KRL-6043] Updated Kroll to bring in delivery address from PharmaConnect 14

Services 15

[KRL-6590] Kroll Reporting Service Client| Added a new option to enable/disable shipping/delivery notifications for Outbound Communications..... 15

Kroll Version 10 Service Pack 25 Payments Feature Release Notes

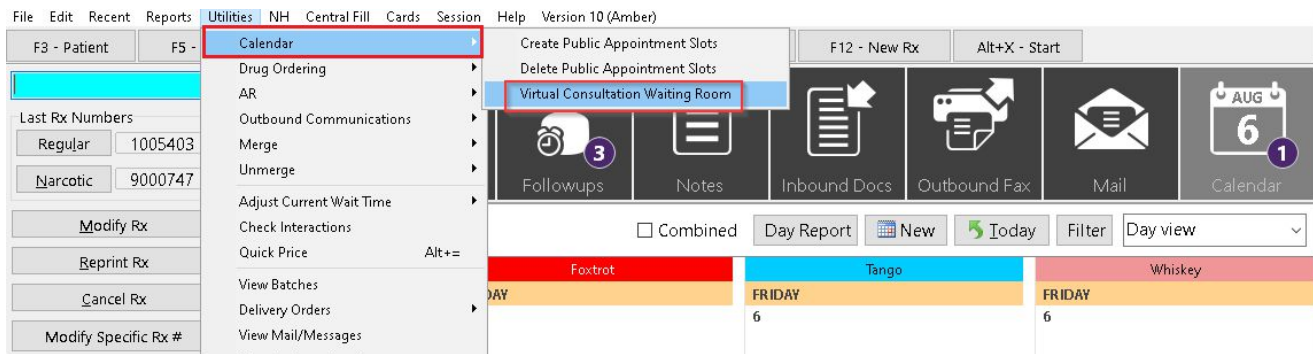
This document is a compilation of new changes in Kroll Version 10 Service Pack 25 Payments. The purpose is to keep users informed of changes to the software and to help users implement and adapt to those changes.

Calendar

[KRL-5911] Virtual Consultation Waiting Room has been added to the Calendar

Feature

A new option “Virtual Consultation Waiting Room” is added to Calendar screen. The Waiting Room screen will display all patients who have entered the waiting room listed thru their respective Telus Health Virtual Consultation meeting URL.



Canada Post

[KRL-6044] Extend the Kroll Canada Post interface to poll Canada Post for status changes on a delivery order so the patient is notified when it is delivered

Feature

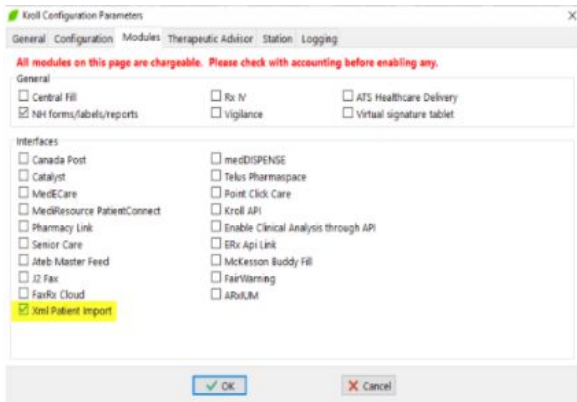
Kroll Reporting Service Client is now enhanced to pull the status update of undelivered Canada Post shipments and is now fed back into Fill and PharmaConnect as necessary.

Configuration

[KRL-6344] Added a Kroll Config option to enable/disable XML patient import

Feature

A new option is added to File>Configuration>Kroll>Modules>XML Patient Import. Once the option has been enabled, the Patient/Rx Import option in Utilities menu is visible.



Fill

[KRL-5820] Kroll changes to support "privileged caregiver"

Feature

A patient that is linked to a PharmaConnect user can now grant access to his/her patient profile to another caregiver PharmaConnect user.

[KRL-6114] Provide the ability to better document "do not counsel" situations

Feature

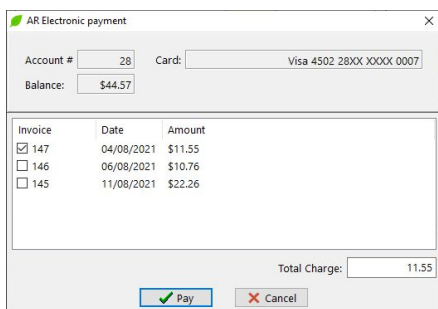
Layout and options on the Rx Counseling form has been updated when clicking on Counsel Patient on Pickup option on the side menu of the F12-Fill screen. When a patient submits an order on PharmaConnect, their Counseling selection on checkout is automatically selected on the Rx Counseling form.

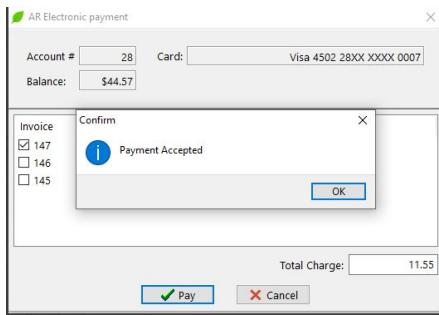
Payments

[KRL-5599] Added a new screen for Accounts Receivable Electronic Payment

Feature

On the patient AR profile, a new screen, AR Electronic Payment, was added. This allows users the option to make a manual/electronic payment.

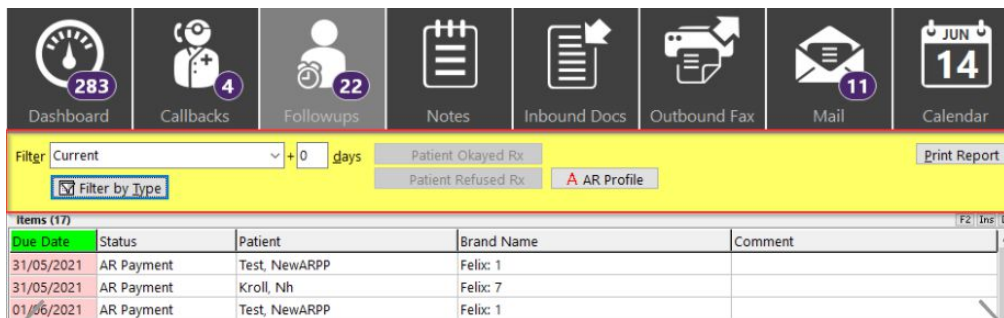




[KRL-5755] Added ToDo type in patient followup for manual payments

Feature

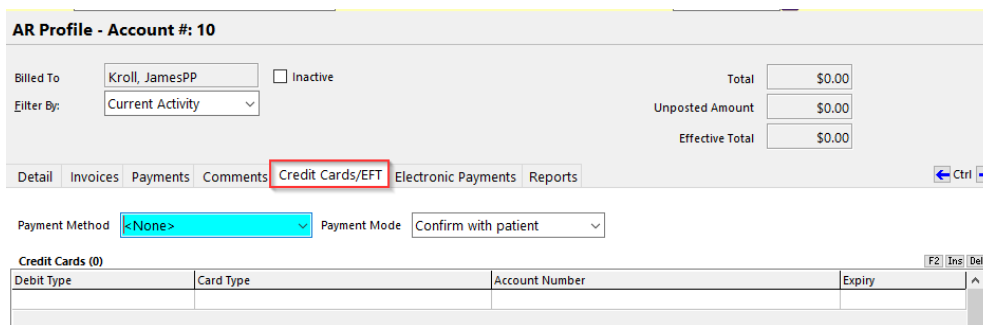
When making a manual payment, an AR payment ToDo followup record will be added to the Follow-up screen.



[KRL-5829] Users can now make a Credit Card or an Electronic Funds Transfer (EFT) to prepay an AR account

Feature

Users can now add a Credit card or an Electronic Funds Transfer (EFT) Type to a Prepay AR account when the pharmacy is linked with PharmaConnect.



[KRL-5837] Users are now able to pickup an Rx if the Rx has not been paid and is charged to a prepay AR account

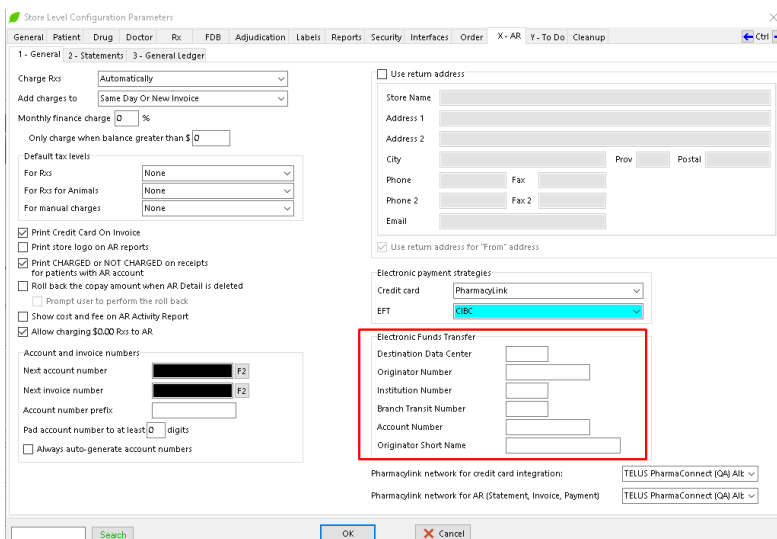
Feature

If the user has a prepay AR account and the Rx has not been paid, changes to allow pickups have been made to the F10-Pickup and Pickup touch screen.

[KRL-5919] Moved electronic payment values for Electronic Funds Transfer into Configuration>Store

Feature

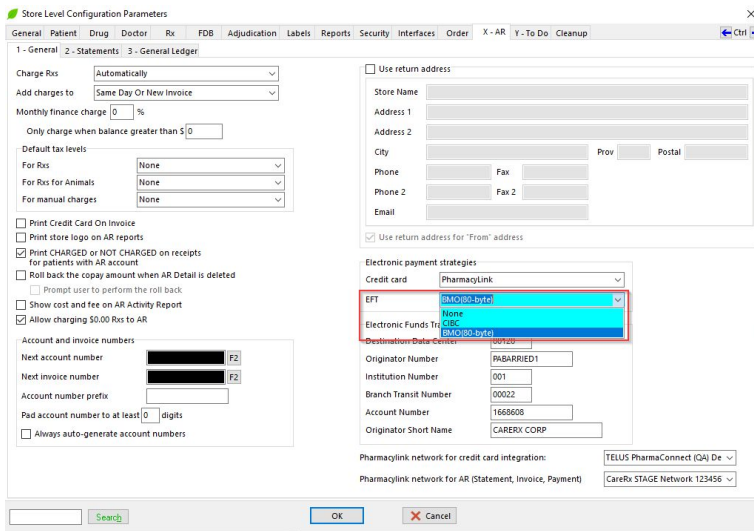
In Configuration> Store-> X-AR, the “Electronic Funds Transfer” is now visible to all Kroll Users.



[KRL-5920] Added a new EFT strategy for BMO

Feature

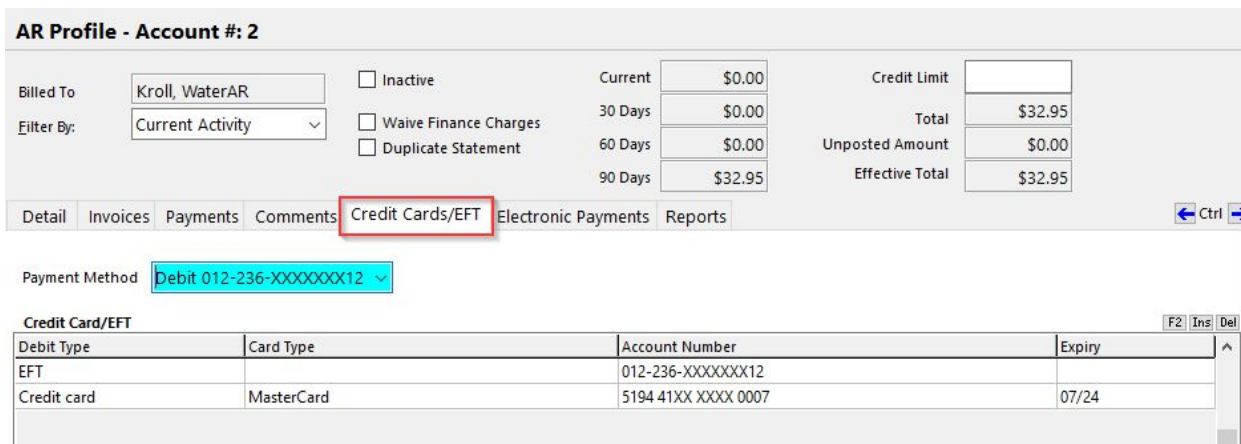
In Configuration-> Store -> X-AR, the option “BMO” is now available under Electronic Payment Strategies >EFT.



[KRL-5921] Added a new tab “Credit Cards/EFT” to the patient AR profile for both post pay and prepay accounts

Feature

A new tab “Credit Cards/EFT” was added to the patient AR profile for both to display patient’s credit card and EFT accounts.



[KRL-5924] Only post pay Accounts Receivable/EFT accounts are supported when an electronic payment batch is created

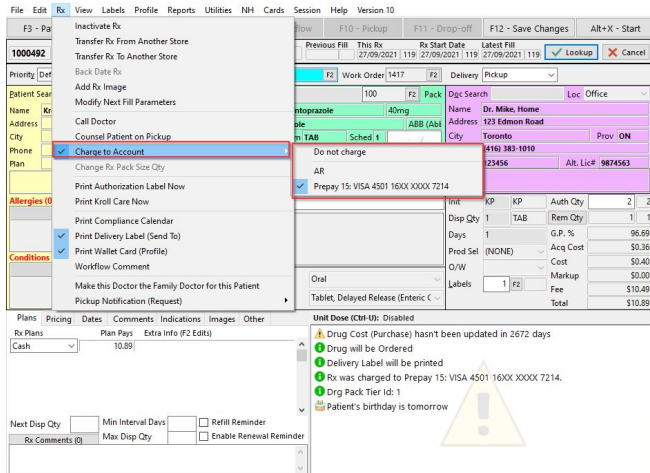
Feature

Electronic payment batch strategy will only support post pay accounts.

[KRL-5973] Added a menu option “Charge to Account” on the F12-Rx Fill window

Feature

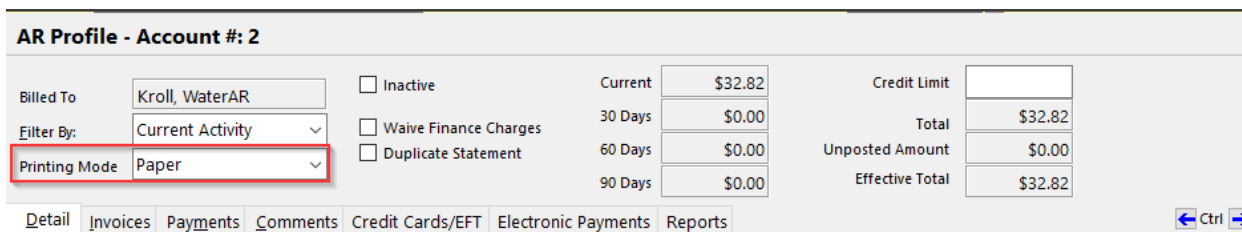
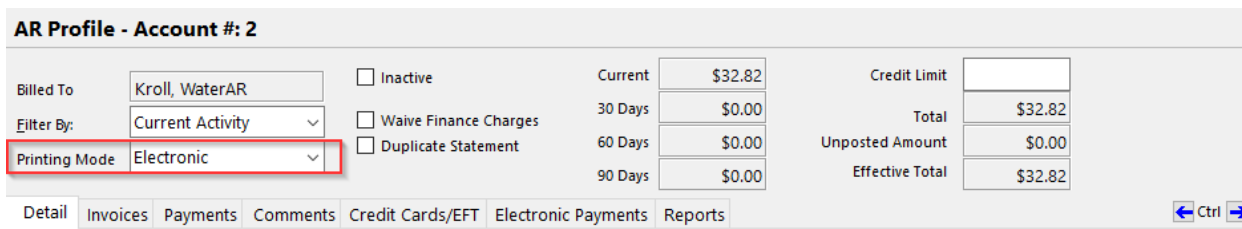
A “Charge to Account” option was added to view all available patient pay to accounts.



[KRL-6079] Added a new field "Printing Mode" to AR profile

Feature

If a patient is linked to PharmacyLink in Kroll, a new field “Printing Mode” is now available on the patient AR profile. This allows users to choose if they want their statements to be Electronic or Paper.



[KRL-6082] Added a new tab for “Electronic Payments”

Feature

A new tab “Electronic Payments” has been added to the patient AR profile. This displays all the electronic payments made by the patient.

AR Profile - Account #: 2

Billed To: Kroll, WaterAR Inactive Current: \$0.00 Credit Limit:

Filter By: Current Activity Waive Finance Charges 30 Days: \$0.00 Total: \$0.00

Printing Mode: Electronic Duplicate Statement 60 Days: \$0.00 Unposted Amount: \$0.00

90 Days: \$0.00 Effective Total: \$0.00

Detail Invoices Payments Comments Credit Cards/EFT **Electronic Payments** Reports Ctrl

Items (1) F2

Card Number	Payment Status	Amount	Message	Date
XXXXXXXX85	Accepted	\$10.89		21/07/2021 12:45

[KRL-6122] Changed prepay charges from AR to always create a new invoice based on the work order

Feature

Under File > Configuration Store > X-AR>Add Charges option is set to NEW INVOICE and the Rx is charged to prepay account, then a new invoice is created per work order.

[KRL-6129] Added a count in brackets for Accounts toolbar on patient edit screen. On the patient card, we now display the total number of Accounts on the right “View” menu

Feature

On the patient card, the number of AR accounts is now displayed in brackets under View>Accounts.

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

Last Name: Kroll First Name: WinterAR Salutation: OK Save Scan

Address 1: Address 2: City: Postal: Country: Canada Email: Quick Code:

Phone Numbers (0)

Description	Phone

 Birthdate: 25/06/1987 Age: 34 years Gender: Female Language: English Height: Weight:

Family Doctor:

Accounts: Default account: None

Items (3)

Type	Description	Current Balance
Post-pay	AR	\$65.39
Pre-pay	Felix: 45	\$0.00
Pre-pay	Account: 16	\$10.99

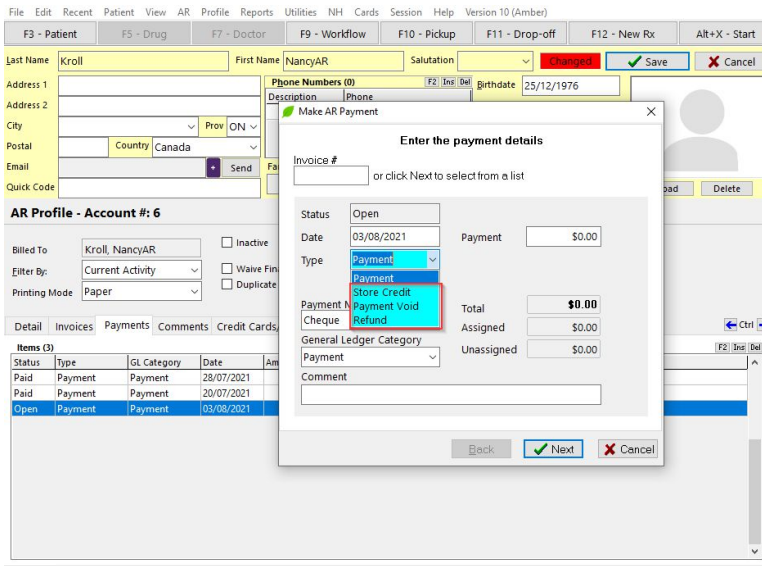
Profile: All Rxs, Active Rxs, Active Rxs w/Passtimes, Refillable Rxs, Pricing Profile, Not Disp./OTC Rxs, Rxs Filled in Error, Suspended Rxs, Transactions, Perform Clinical Analysis, View: Alternate Addresses, **Accounts (3)**, Appointments

[KRL-6193] Made changes to the “Make AR Payment” window

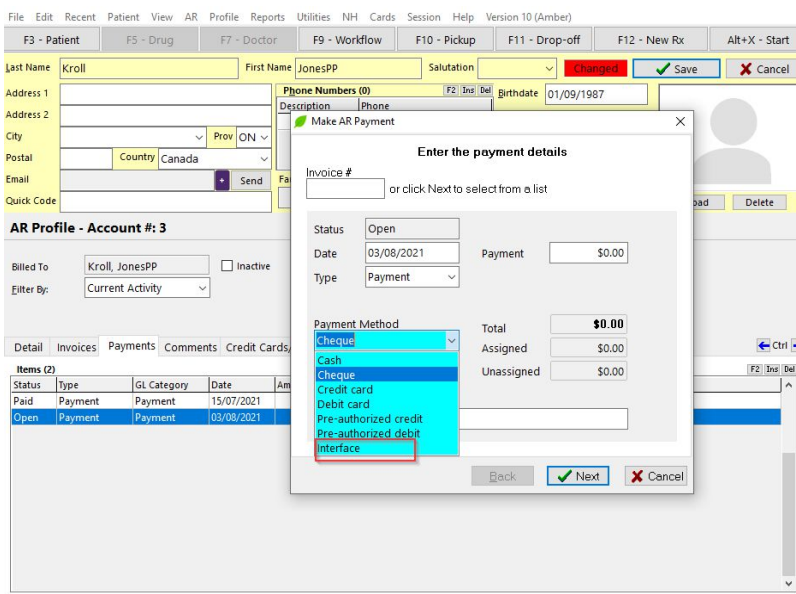
Feature

On the “Make AR Payment” window, the below changes were made:

- "Credit" has been renamed to "Store Credit"
- "Payment Reversal" has been renamed to "Payment Void"
- "Refund" option has been added



- A new option "Interface" has been added to the “Make AR Payment” window.



[KRL-6198] Changes to the prepay AR account and OCM

Feature

When a work order is created that is related to a prepay AR account and is linked to PharmacyLink, an OCM notification is created and sent to the patient. If the prepay account is Pre-Authorized, a payment is made towards the work order. If the payment is successful, an OCM notification is created and sent to the patient. If the payment is not successful, a patient follow up is added to the Follow-ups queue with the failure reason.

[KRL-6232] Added “Void Payment” for electronic payments

Feature

Users now have the ability to select an electronic payment from the payment tab, right click and select to "Void Payment" only applies to reversals that occur on the same date as the charge, provided the electronic payment is made through an integrated credit card and has status “Paid” and is not reversed.

Prepay 15: VISA 4501 16XX XXXX 7214

Billed To: Inactive
 Filter By: Total: \$1.35
 Unposted Amount: \$0.00
 Effective Total: \$1.35

Detail Invoices Payments Comments Credit Cards/EFT Electronic Payments Reports

Status	Payment #	Type	GL Category	Date	Amount	Method	Assigned	Unassigned	Comment
Paid	350	Payment Void	Payment	08/10/2021	-\$12.00	Electronic Payment	-\$12.00	\$0.00	
Paid	349	Payment	Payment	08/10/2021	\$12.00	Electronic Payment	\$12.00	\$0.00	
Paid	341	Payment	Payment	27/09/2021	\$12.60	Electronic Payment	\$12.60	\$0.00	
Paid	340	Payment	Payment	27/09/2021	\$2.00	Electronic Payment	\$2.00	\$0.00	
Paid	338	Payment	Payment	27/09/2021	\$10.59	Electronic Payment	\$10.59	\$0.00	
Paid	337	Payment	Payment	27/09/2021	\$10.89	Electronic Payment	\$10.89	\$0.00	
Paid	336	Payment	Payment	27/09/2021	\$10.71	Electronic Payment	\$10.71	\$0.00	
Paid	335	Refund	Payment	24/09/2021	-\$10.54	Electronic Payment	-\$10.54	\$0.00	
Paid	334	Payment	Payment	24/09/2021	\$10.54	Electronic Payment	\$10.54	\$0.00	
Paid	333	Refund	Payment	24/09/2021	-\$10.58	Electronic Payment	-\$10.58	\$0.00	
Paid	332	Payment	Payment	24/09/2021	\$10.58	Electronic Payment	\$10.58	\$0.00	

[KRL-6285] Added the ability for the primary account holder, who is not linked to the pharmacy, to register dependants in PharmaConnect

Feature

A primary account holder in PharmaConnect, who is not linked to a pharmacy, is now able to register dependants and have their dependants profile created in the pharmacy.

[KRL-6341] Deleting pending electronic payments is now allowed

Feature

When a payment has a status of pending, we can now delete the payment. Select the pending payment, right click and choose Delete. Once the payment has been deleted, it is removed from the Payments list.

VISA 4501 16XX XXXX 7214

Billed To: Inactive
 Filter By: Total: \$10.73
 Unposted Amount: \$0.00
 Effective Total: \$10.73

Detail Invoices Payments Comments Credit Cards/EFT Electronic Payments Reports

Status	Payment #	Type	GL Category	Date	Amount	Method	Assigned	Unassigned	Comment
Pending	149	Payment	Payment	27/08/2021	\$10.73	Electronic Payment	\$10.73	\$0.00	
Paid	148	Payment	Payment	27/08/2021	\$10.71	Electronic Payment	\$10.71	\$0.00	

[KRL-6430] For Prepay AR Accounts added a button to manually trigger an OCM notification

Feature

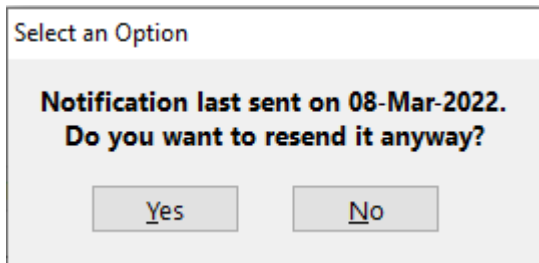
A new option has been added to Prepay AR accounts to manually trigger an OCM notification. By clicking the option, if the patient does not have any existing notifications, then a new OCM notification is sent. If the patient has existing notifications, then a prompt is displayed (see screenshot below).

The new option works with below condition:

- Account has to be prepay
- Current Balance on the patient AR profile > 0
- Credit card needs to be set

The screenshot shows the patient AR profile interface. The 'Send Payment Notification' button is highlighted in red. Below the patient information, there is a 'Prepay 15: VISA 4501 16XX XXXX 7214' section with a 'Total' of \$1.35. At the bottom, there is a table of items with columns for Status, Invoice #, Date, Patient Name, Comment, GL Category, TaxType, and Amount.

Status	Invoice #	Date	Patient Name	Comment	GL Category	TaxType	Amount
Posted	470	08/10/2021 1:1	Kroll, WaterAR		Charge	None	\$12.00
Paid	462	27/09/2021 4:0	Kroll, WaterAR		Charge	HST - 5%	\$12.00
Paid	461	27/09/2021 3:0	Kroll, WaterAR		Charge	None	\$22.00
Paid	459	27/09/2021	1000492 Kroll, WaterAR	1 Abbott-Pantoprazole 40mg	Charge	None	\$10.89
Paid	458	27/09/2021	1000491 Kroll, WaterAR	1 ACT Meloxicam 7.5mg	Charge	None	\$10.71
Paid	457	27/09/2021	1000490 Kroll, WaterAR	1 ACT-Venlafaxine XR 37.5mg	Charge	None	\$10.59
Paid	448	24/09/2021 1:2	Kroll, WaterAR		Charge	None	\$12.00
Paid	456	24/09/2021	1000489 Kroll, WaterAR	1 Apo-Domperidone 10mg	Charge	None	-\$10.54
Paid	455	24/09/2021	1000489 Kroll, WaterAR	1 Apo-Domperidone 10mg	Charge	None	\$10.54
Paid	454	24/09/2021	1000488 Kroll, WaterAR	1 AA-Amilzide 50/5mg	Charge	None	-\$10.58



[KRL-6444] Allow Deletion of Patient Credit Cards if it has been used previously for an Electronic Payment

Feature

Users can now delete a credit card that is not the default payment card from the patient AR profile if it has been previously used.

Prepay 15: VISA 4501 16XX XXXX 7214

Billed To: Inactive
 Filter By:

Total: \$1.35
 Unposted Amount: \$0.00
 Effective Total: \$1.35

Detail Invoices Payments Comments Credit

Payment Method:

Are you sure?

Are you sure you want to delete
Credit card - American Express 3414 00XXXX X0000?

Yes No

Debit Type	Card Type	Card Number	Expiry
Credit card	Visa		07/24
Credit card	MasterCard	5194 41XX XXXX 0007	07/25
Credit card	American Express	3414 00XXXX X0000	07/25
Credit card	VISA	4501 16XX XXXX 7214	07/25

[KRL-6457] Create a bulletin for PharmaConnect when AR account has something to pay

Feature

If the patient has a prepay account that the patient can pay online, and we have a positive balance on the patient AR account, then a bulletin is created on the PharmaConnect patient portal.

Delivery Order

[KRL-6367] Changed delivery order waybill field from disabled to read only

Feature

When a delivery order has been shipped, the waybill field on the Delivery Order Form becomes read-only instead of greyed out and can be highlighted and copied by user.

Delivery Order Form

Ship To: Status:

Location: Delivery #:

Address1: Delivery Type:

Address2: Delivery Method:

City: Payment Method:

Province: Waybill #:

Country: Shipping Cost:

Postal: Comment (Character limit):

Phone #: Ext:

Delivery Charge: Charge: 10.00 Tax Type: HST - 13%
 HST - Full: \$1.30 HST/GST: \$0.00
 Total: \$11.30

Total Item Value: \$15.15
 Total Delivery Order Value: \$26.45
 Total Patient Pays + Charge: \$26.45

Shipping Status: Details

Undo

Cut

Copy

Paste

Delete

Select All

Right to left Reading order

Show Unicode control characters

Insert Unicode control character

Description	RdNum	Patient	Total	Pat Pays
Bag				
fuzzy socks		Test, Pat12	\$2.50 HST - 13% \$0.33	\$2.83
Vitamin C 500mg	1002755	Test, Pat12	\$12.32 <None>	\$12.32

Undo Ship Deliver Print OK Cancel

[KRL-6378] Queue up a delivery order OCM shipped message when a delivery order has been shipped

Feature

When a delivery order is set with a Delivery Type of Mail Order/Courier and the delivery order is marked as Shipped, an Order Shipped message is queued in the OCM queue.

The screenshot shows the patient profile for Bobby Ngo, born 01/01/1990, with a current balance of \$10.93. A table of recent payments is shown below:

Status	Invoice #	Date	Subtotal	HST	HST/GST	Tax1	Tax2	Total	Paid	Balance
Open	318	26/08/2021	\$10.93	\$0.00	\$0.00	\$0.00	\$0.00	\$10.93	\$0.00	\$10.93
Paid	298	24/08/2021	\$28.81	\$0.00	\$0.00	\$0.00	\$0.00	\$28.81	\$28.81	\$0.00
Paid	297	24/08/2021	\$17.02	\$0.00	\$0.00	\$0.00	\$0.00	\$17.02	\$17.02	\$0.00
Paid	296	24/08/2021	\$1.18	\$0.00	\$0.00	\$0.00	\$0.00	\$1.18	\$1.18	\$0.00
Paid	286	23/08/2021	\$10.52	\$0.00	\$0.00	\$0.00	\$0.00	\$10.52	\$10.52	\$0.00
Paid	280	20/08/2021	\$13.35	\$0.00	\$0.00	\$0.00	\$0.00	\$13.35	\$13.35	\$0.00
Paid	279	20/08/2021	\$12.12	\$0.00	\$0.00	\$0.00	\$0.00	\$12.12	\$12.12	\$0.00
Paid	278	20/08/2021	\$12.12	\$0.00	\$0.00	\$0.00	\$0.00	\$12.12	\$12.12	\$0.00
Paid	277	20/08/2021	\$12.12	\$0.00	\$0.00	\$0.00	\$0.00	\$12.12	\$12.12	\$0.00
Paid	276	20/08/2021	\$12.12	\$0.00	\$0.00	\$0.00	\$0.00	\$12.12	\$12.12	\$0.00
Paid	275	20/08/2021	\$12.12	\$0.00	\$0.00	\$0.00	\$0.00	\$12.12	\$12.12	\$0.00

[KRL-6043] Updated Kroll to bring in delivery address from PharmaConnect

Feature

If Delivery Address Flag is enabled on checkout in PharmaConnect, a new delivery address will be saved in Kroll and will become the default delivery address.

The screenshot shows the 'ADT Wizard' dialog box for updating patient address information for Romano, Ray. It displays 'Incoming ADT Patient Address Details' and 'Local Patient Address Details'. The local details show a delivery address at 110 Delivery Rd, Toronto, ON K1A 1A1, with a 'Use for delivery' checkbox checked.

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

Last Name: Romano First Name: Ray Salutation: OK Save Scan

Address 1: 123 Fake Street Phone Numbers (1): Birthdate: 01/01/1966

Address 2: Description: Phone Home: (416) 383-1010 Age: 55 years

City: Toronto Prov: ON Gender: Male

Postal: K1A 1A1 Country: Canada Language: English

Email: rromano@mailinator.com Send Family Doctor Height: Weight: Load Delete

Quick Code: F2: Clear

Alternate Addresses

Items (2)

Location	Address1	Address2	City	Prov	Postal Code	Phone	Fax	Delivery	Billing
Home	123 delivery street		toronto	ON	K1A1A1			N	N
Delivery	110 Delivery Rd		Toronto	ON	K1A1A1			Y	N

Services

[KRL-6590] Kroll Reporting Service Client| Added a new option to enable/disable shipping/delivery notifications for Outbound Communications

Feature

A new option "Enable Shipping and Delivery Notification" is added in File > Configuration > Store > Interface > Outbound Communication. When the option is enabled, a delivery order that has a delivery type set as mail order/courier, and is shipped and delivered, a notification will be queued for the delivery order status that is marked as shipped or delivered respectively. When the option is disabled, no shipped or delivered notification will be queued.

Store Level Configuration Parameters

General Patient Drug Doctor Rx FDB Adjudication Labels Reports Security Interfaces Order X-AR Y-To Do Cleanup

Point of Sale
Robotic
Central Fill
Outbound Communication
Outbound Fax
External Interfaces
Pharmacy Link
VoicePort
CanadaPost
RxTouch
AR Payment Import File
PointClickCare

Messages (6)

Message Type	Comm Type	Provider
Rx Ready For Pickup	Phone	<None>
Refill Reminder	E-mail	PharmacyLink
Accounts Receivable	SMS	PharmacyLink
Birthday Greeting	To Do	<None>
Free Form Message	Mobile Push Notifications	PharmacyLink
Renewal Reminder		

Rx Ready For Pickup - Comm Type (6)

Escalation

Level	Hours
Level 1	24 hours
Level 2	48 hours
Level 3	48 hours
Level 4	hours
Level 5	hours

Notification Window (Hours of Operation): Anytime

Notify when items in Queue are more than 30 minutes overdue

Allow sending free form or editing predefined text messages

Enable Shipping and Delivery Notifications

Send appointment reminder #1 60 minutes before the appointment (blank means no reminder)

Only send appointment reminder #1 if the meeting was created at least 12 hours before the reminder time

Send appointment reminder #2 1440 minutes before the appointment (blank means no reminder)

Only send appointment reminder #2 if the meeting was created at least 48 hours before the reminder time

Set patient appointment reminder alert in .jcs file to 5 minutes before the appointment (blank means no alert)

Send appointment immunization consent questionnaire 180 minutes before the appointment (blank means no questionnaire)

Search OK Cancel

File Edit Recent Reports Utilities NH Cards Session Help Version 10

F3 - Patient F5 -

Last Rx Numbers
 Regular 1000513
 Narcotic 9000056

Modify Rx
 Reprint Rx
 Cancel Rx
 Modify Specific Rx #
 Reprint Specific Rx #
 Counsel Rx

Utilities

- Drug Ordering
- AR
- Outbound Communications
- Merge
- Unmerge
- Adjust Current Wait Time
- Check Interactions
- Quick Price Alt+=
- View Batches
- Delivery Orders
- View Mail/Messages
- View Packager Batches
- View Pending Network Queue
- Labels
- Script Reentry Mode
- Credit Card Password Manager
- Database Maintenance
- Drug
- Patient/Rx Import**
- Printed Document Scan/Import
- Undo Pickup Ctrl+F10

F10 - Pickup F11 - Drop-off F12 - New Rx Alt+X - Start

Followups (41) Notes Inbound Docs Outbound Fax Mail Calendar

overdue	0-1 hrs	1-4 hrs	4+ hrs	Tomorrow	Trouble	Total
74	0	0	0	0	0	74
73	0	0	0	0	0	73
67	0	0	0	0	0	67
0	0	0	0	0	0	0

Rx Counts

New Rxs	0
Repeat Rxs	0
Total Rxs	0

Details

7 days	7-14 days	14-21 days	21-28 days	28+ days	Total	Total \$
0	0	0	0	152	152	\$352.00

DATABASE FOR DEVELOPMENT USE ONLY

There are open Cycle Counts