

Outbound Communication Module

8.3

Kroll Computer Systems Inc

The Outbound Communication Module leverages IVR and 3rd party systems to carry out automatic refill reminder notifications for increased patient compliancy.



Table of Contents

Outbound Communication Module Setup	2
Activating the Outbound Communication Module	2
Configuring the Outbound Communication Module	2
Message Types and Escalations.....	3
Communication Types	4
Configuring the Number of Days in Advance to Send Communications.....	5
Setting Prompting Options	6
Using the Outbound Communication Module	6
Configuring Patients for Refill Reminders	7
Flagging Prescriptions for Refill Reminders.....	8
Viewing the Outbound Communications Queue	8
Kroll Helpdesk Information	10
Head Office – Toronto	10
Western Canada – Edmonton	10
Eastern Canada – Dartmouth	10

Outbound Communication Module

With an increasing trend to provide patient compliance via refill reminders, Kroll Computers, in conjunction with vendors, has developed the Outbound Communication Module. The module is designed to integrate with existing pharmacy IVR systems and vendors to carry out automatic refill reminder notifications for designated patients. The successful implementation of this Kroll feature will increase patient compliance, customer satisfaction, and pharmacy productivity.

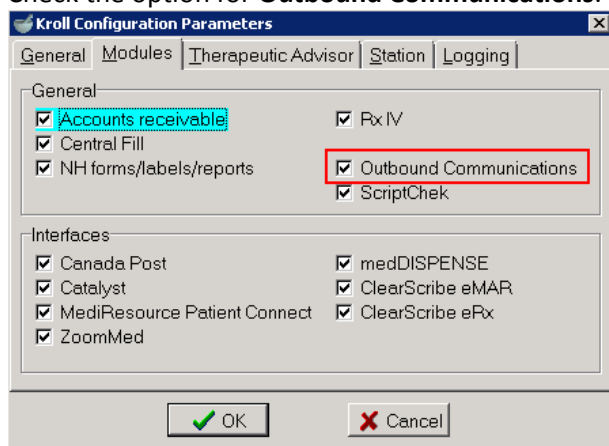
Outbound Communication Module Setup

Activating the Outbound Communication Module

The Kroll Key is required to activate the **Outbound Communication Module**. Customers will need to call the Kroll Software Helpdesk (800-263-5876) to set up this function.

To activate the Outbound Communication Module:

1. From the **Start Screen** select **File→Configuration→Kroll**.
2. Login as a Kroll super user when prompted.
3. Select the **Modules** tab.
4. Check the option for **Outbound Communications**.



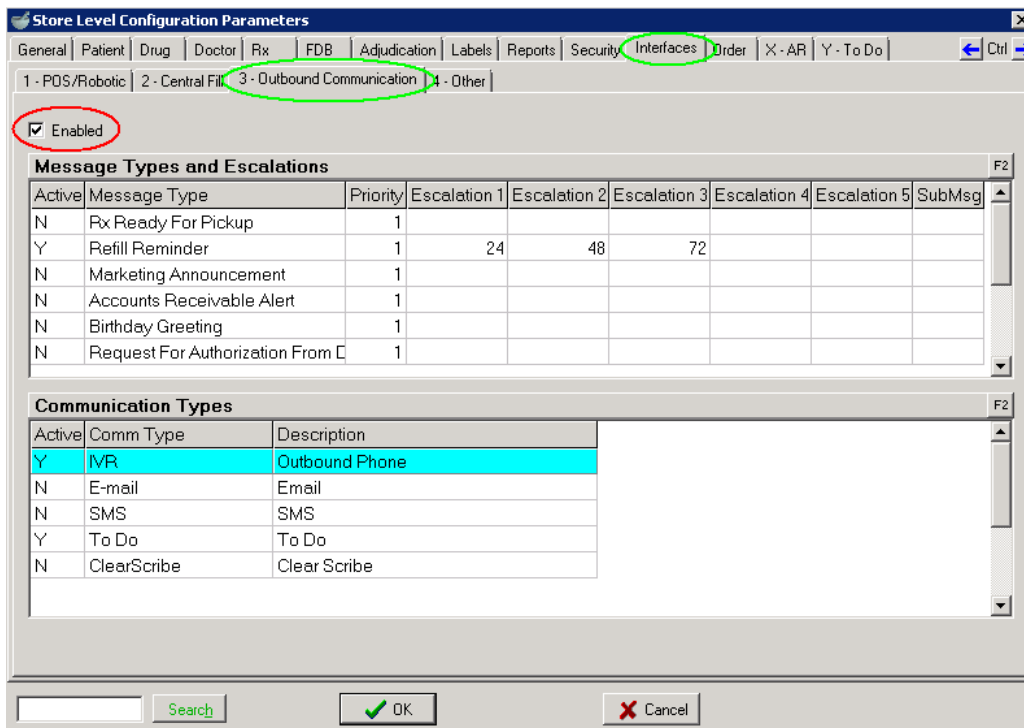
Note: Activation of this flag allows configuration of the Outbound Communication Module settings located in **Store Configuration**.

Configuring the Outbound Communication Module

Once the Outbound Communication Module is enabled in Kroll it can be configured as follows:

1. From the **Start Screen** select **File→Configuration→Store**.
2. Login as a user that has access to the Store Configuration when prompted.
3. Select the **Interfaces→3-Outbound Communication** tab.

4. Check the **Enabled** option to enable outbound communications for the store. This will enable access to **Message Types and Escalations** and **Communication Types**.

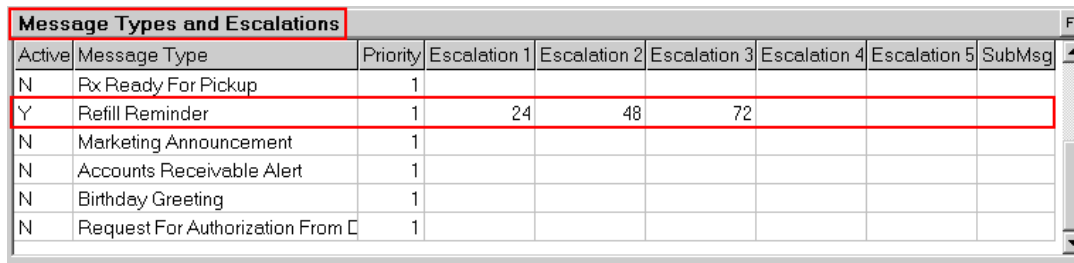


Message Types and Escalations

Message Types indicate the types of communications enabled in the system (i.e. the events that would prompt a communication attempt). Supported Message Types will vary from vendor to vendor so specific availability can be obtained by contacting Kroll or the IVR/service vendor directly.

To enable a Message Type:

1. Highlight the row and click **F2** to edit the entry; this will open the **Edit OCM Message** window.



- To activate the selected communication type, check the **Enabled** field.

The screenshot shows a dialog box titled "Edit OCM Message". It contains a "Message Type" dropdown menu. Below it is a checkbox labeled "Enabled" which is checked and highlighted with a red rectangular box. Underneath the checkbox is a "Priority" field with the value "1". A section titled "Escalation" contains five rows, each with a label (Level 1 through Level 5), a text input field, and the word "hours". The input fields contain the values 24, 48, 72, and are empty for Level 4 and Level 5. At the bottom of the dialog are two buttons: "Save" with a green checkmark icon and "Cancel" with a red X icon.

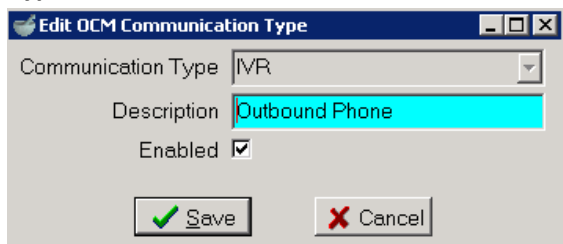
- Priority indicates to the IVR/3rd party system in which order messages should be processed. Any numerical value can be entered where one (1) is the highest priority.
Note: Not all systems support Priority.
- The **Escalation** section allows for supporting systems to be setup to make follow-up communications when no response is received from the recipient:
 - Level 1 is the number of hours that will elapse before the recipient is contacted a 2nd time from the initial communication.
 - Level 2 is the number of hours that will elapse before the recipient is called a 3rd time from the initial communication.
 - And so on...**Example:** The escalation levels set in the above scenario indicate that the system will attempt to contact the recipient every day for three (3) days subsequent to the initial call.

Communication Types

Communication Types are the methods of communication that can be used to contact a recipient for a given Message Type. As with Message Types, support of Communication Types will vary from vendor to vendor and exact details can be obtained from Kroll or from the vendor directly.

To enable a method of communication:

1. Highlight the row and click **F2** to edit the entry; this will open the **Edit OCM Communication Type** window.



2. Check the **Enabled** field.
3. The available Communication Types are:
 - **IVR:** Phone calls will be made by an Interactive Voice Response system.
 - **E-mail:** Communications will be sent to recipients via e-mail.
 - **SMS:** Recipients will receive text messages on their cellular device.
 - **To Do:** Sets prescriptions marked as AutoRefill to appear in the To Do module.

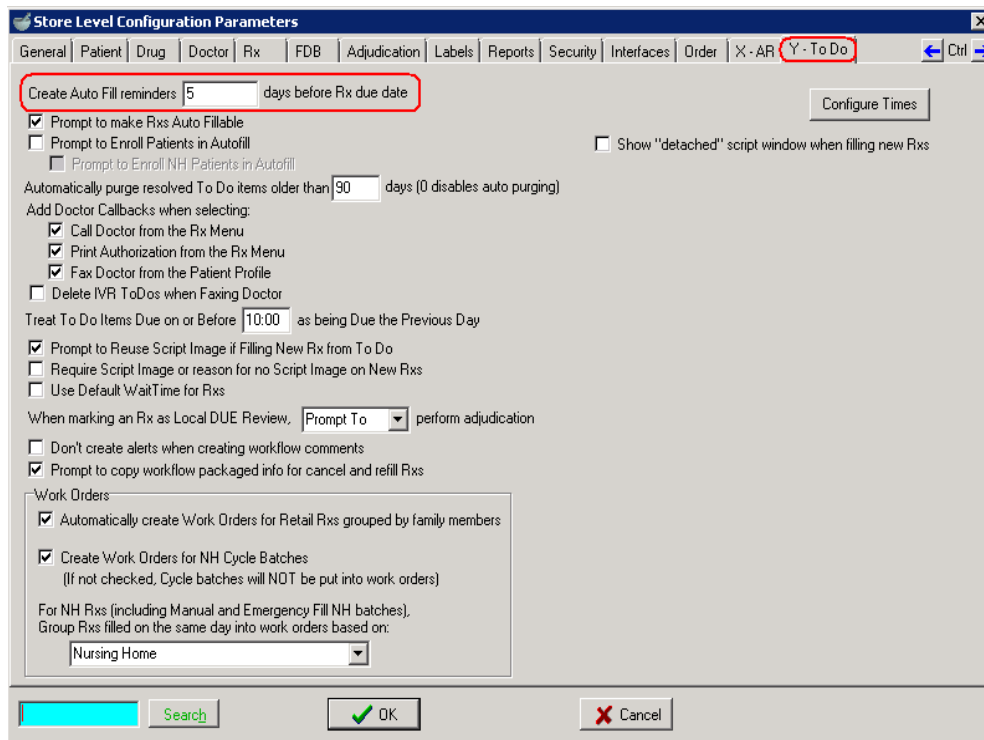
Communication Types		
Active	Comm Type	Description
Y	IVR	Outbound Phone
N	E-mail	Email
N	SMS	SMS
Y	To Do	To Do

Configuring the Number of Days in Advance to Send Communications

Communications are sent to recipients before the actual date of a refill to give them time to respond and ensure proper compliancy. The number of days in advance to send communications is configurable and can be set in Store Configuration. To do so:

1. From the **Start Screen** select **File→Configuration→Store**.
2. Select the **Y-To Do** tab.

3. Set the **Create Auto Fill reminders** ___ days before Rx due date field to the desired number of days.



Setting Prompting Options

Within Store Configuration there are a couple additional options to make using the Outbound Communications Module easier. The following options are located on the **Y-To Do** tab of **File**→**Configuration**→**Store**:

- **Prompt to make Rxs Auto Fillable:** Enabling this option will prompt users to flag prescriptions for patients enrolled in AutoRefill.
 - **Prompt to Enroll Patients in AutoFill:** Enabling this option will prompt users to enroll patients in AutoRefill that are currently not when filling prescriptions.
- Note:** Having both options enabled will act as a catch all such that patients not enrolled in AutoFill will generate a prompt and then once enrolled the prompt to mark the prescription for AutoFill will be generated.

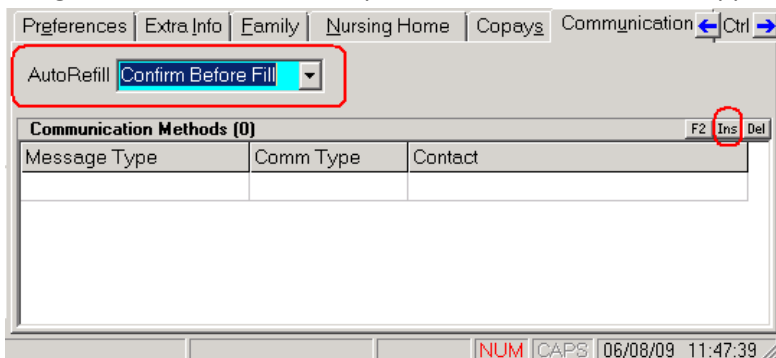
Using the Outbound Communication Module

In order for Refill Reminders to work, first the Outbound Communication Module needs to be enabled and set up and then the settings for each patient need to be configured. Once the system is enabled and patients have been enrolled then prescriptions can be flagged to generate outbound communications.

Configuring Patients for Refill Reminders

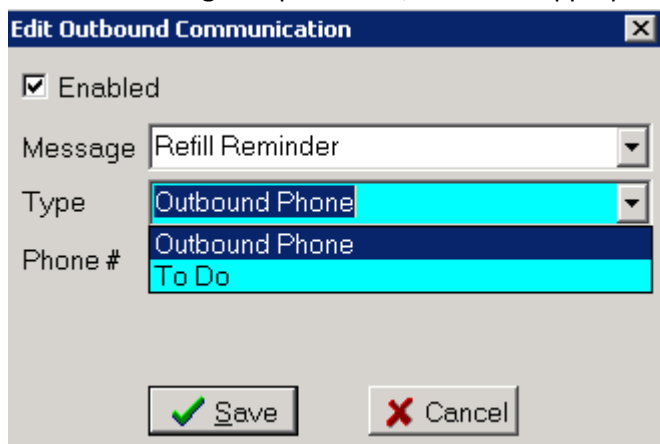
To set up a patient for the refill reminders:

1. Locate a patient and pull up the Patient Card.
2. Select the **Communications** tab.
3. Bring down the **AutoRefill** dropdown menu and select the applicable option.



Note: Typically patients will be set to **Confirm Before Fill**.

4. Once the applicable **AutoRefill** option has been selected, a **Communication Method** must be chosen:
 - a) Click **INS** to add a Communication Method.
 - b) Select **Enabled** on the **Edit Outbound Communication Window**.
 - c) From the **Message** dropdown list, select the appropriate message type.



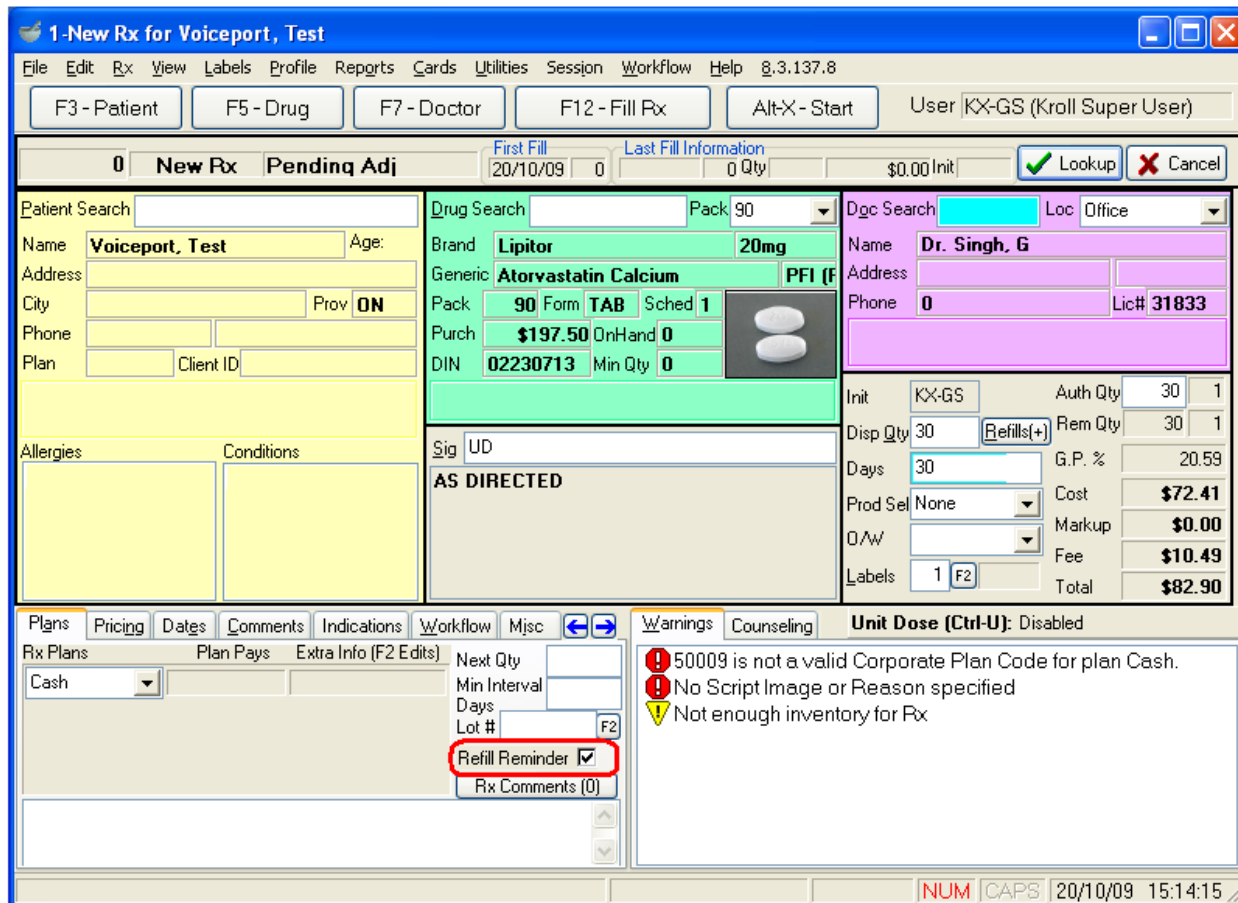
Note: The types available will depend on the **Message Types** enabled through **Store Configuration**.

- d) Select one of the available communication types.

Note: The types available will depend on the **Communication Types** enabled through **Store Configuration**.
- e) Complete the form by entering the patient's contact information (phone number, e-mail address etc).

Flagging Prescriptions for Refill Reminders

The only requirement to flag a prescription for reminders is to ensure that the **Refill Reminder** option is checked off. In order for a refill reminder to be generated, in addition to the Refill Reminder flag, the prescription must have refills and the patient must be enrolled in Outbound Communications.

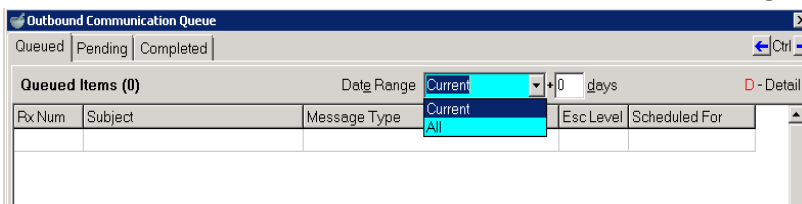


Note: The options in Store Configuration mentioned previously will ease the enrollment process by automatically prompting to enroll patients and flag prescriptions (see Setting Prompting Options).

Viewing the Outbound Communications Queue

Once communications have been generated their status can be viewed to determine if there were any problems or if communications were successful. Depending on the type of communication other information can be gleaned from the queue such as whether or not a patient confirmed a refill. To view the **Outbound Communications Queue**:

1. From the Start Screen select **Utilities**→**Communication**→**Management**→**View Queue**.



2. There are 3 tabs in the **Outbound Communication Queue** window:
 - **Queued:** Communications that have not yet been pushed to the IVR/3rd party system.
 - **Pending:** Communications have been pushed to the IVR/3rd party system, but have not yet been delivered to the recipient and/or no response from the recipient has been received.
 - **Completed:** Communications have gone full circle and resulted in either a successful transmission or an error.

Note: Entries can be filtered to a particular **Date Range** by selecting **Current + ___ days**.

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