Outbound Communication Module

8.5

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

KROLL

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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 and pickup notifications for designated patients. The successful implementation of this Kroll feature will increase patient compliance, customer satisfaction, and pharmacy productivity.

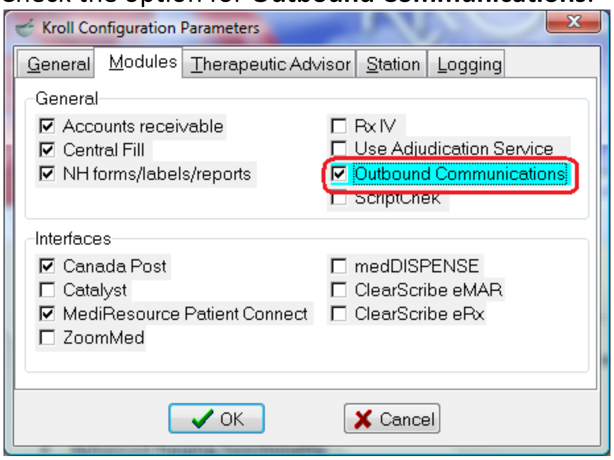
Outbound Communication Module Setup

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**.



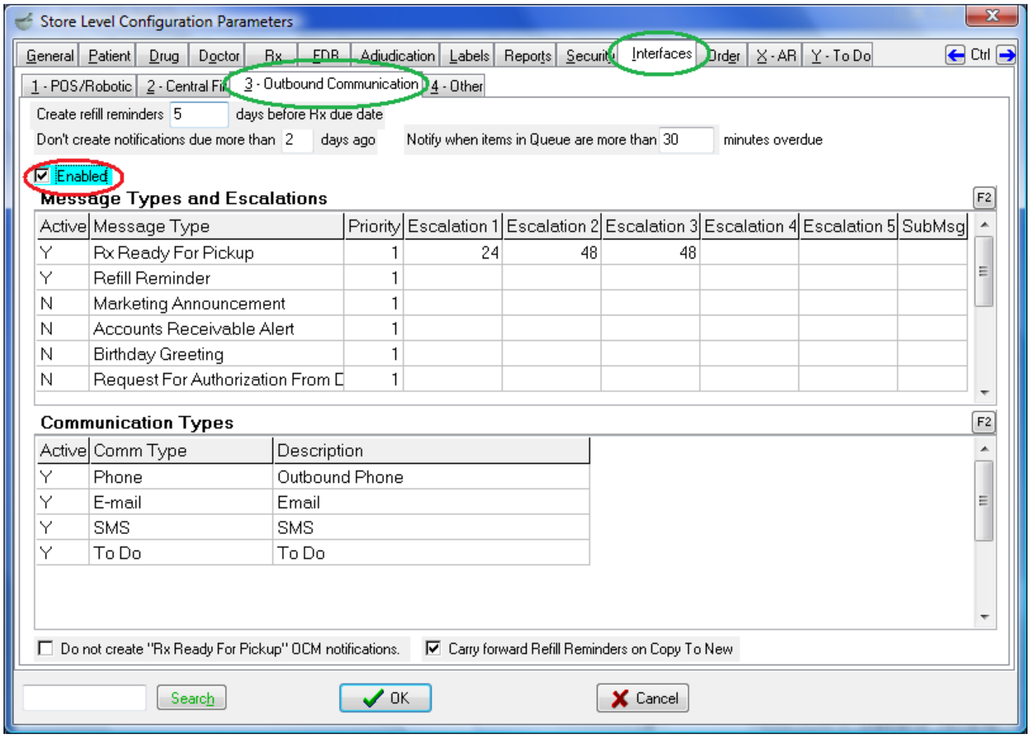
Note: Activation of this flag allows configuration of the Outbound Communication Module settings located in **Store Configuration**.

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**.



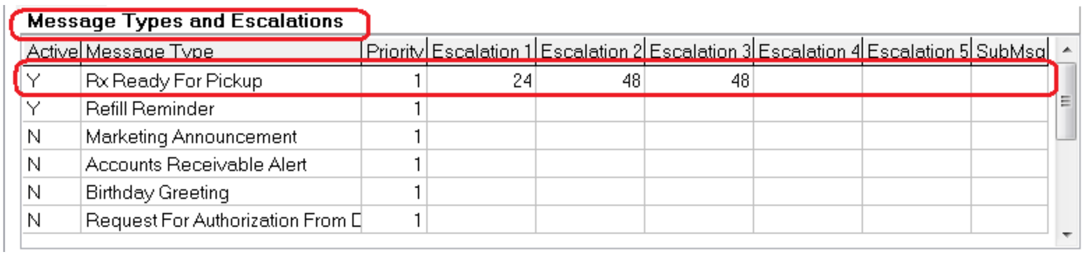
5. **Create refill reminders X days before Rx due date:** Based on the fill date and the days supply, an Rx will be assigned an "action" date of this number of days prior to its due date.
6. **Don't create notifications due more than X days ago:** In the event the IVR service is inoperable for a few days or if an Rx is backdated such that its due date falls in the past, you can tell the system to ignore any items that are overdue by this number of days. As an example, if you have a refill reminder set to 5 days, you may want to set this notification due date to between 1 to 4 days.
7. **Notify when items in queue are more than X minutes overdue:** The Kroll IVR service sends new notifications to the IVR system approximately every minute. In the event of a failure on either end, you can be notified when there are queued items that are more than this many minutes overdue from being transmitted.
8. **Do Not Create "Rx Ready For Pickup" OCM notifications:** Found at the bottom of the screen, disabling this will prevent Rx Ready for Pickup notifications from being sent.
9. **Carry forward Refill Reminders on Copy to New:** When you are copying an Rx to a new number and there is a refill reminder on the original Rx, this will determine if that reminder is carried forward to the new Rx.

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:

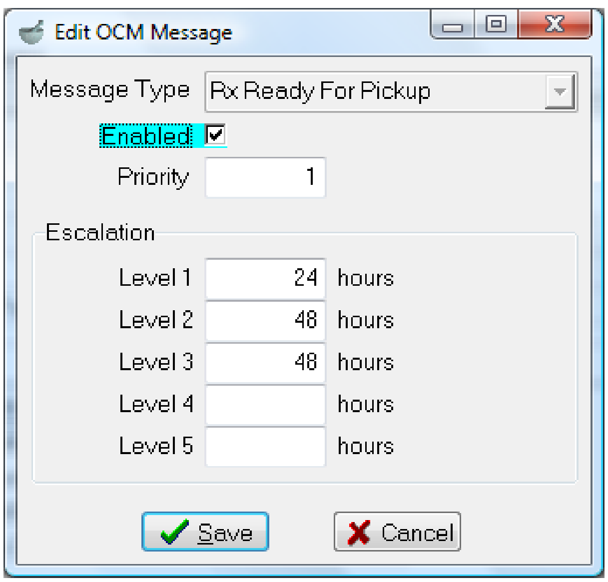
1. Highlight the row and click **F2** to edit the entry; this will open the **Edit OCM Message** window.



Message Types and Escalations

Active	Message Type	Priority	Escalation 1	Escalation 2	Escalation 3	Escalation 4	Escalation 5	SubMsg
Y	Rx Ready For Pickup	1	24	48	48			
Y	Refill Reminder	1						
N	Marketing Announcement	1						
N	Accounts Receivable Alert	1						
N	Birthday Greeting	1						
N	Request For Authorization From D	1						

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



3. Priority indicates to the IVR/third 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.
4. The **Escalation** section allows for supporting systems to be setup to make follow-up communications when an escalation request is returned by that system which typically occurs 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 elapsed since the Level 1 escalation before the recipient is called a 3rd time from the initial communication.

- And so on…

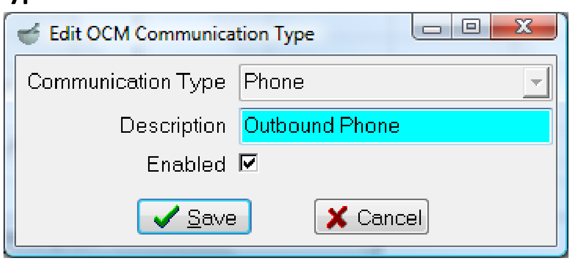
  Example: The escalation levels set in the above scenario indicate that the system will attempt to contact the recipient after one day has elapsed, then two days later (Day 3) and then again, two days later (Day 5)

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.



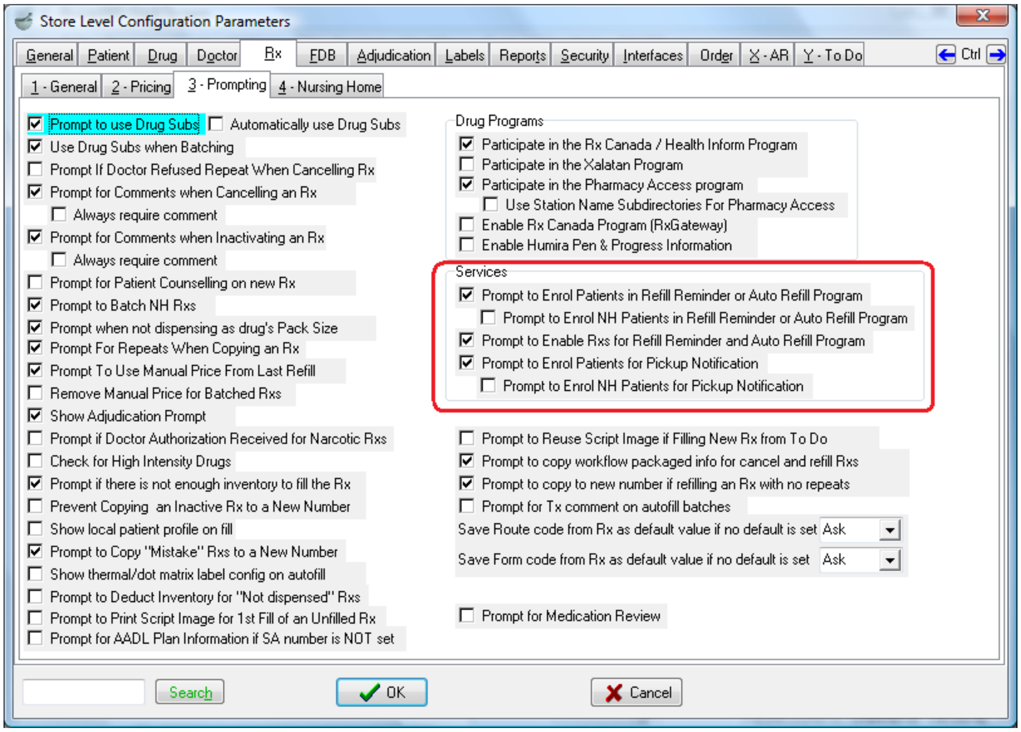
2. Check the **Enabled** field.
3. Enter a screen-friendly name for the **Description**.
4. The available Communication Types are:
   - **IVR**: Phone calls will be made by an Interactive Voice Response system.
   - **E-mail**: Communications will be sent to recipients via e-mail.
   - **SMS**: Recipients 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	Phone	Outbound Phone
Y	E-mail	Email
Y	SMS	Text
Y	To Do	To Do

Setting Prompting Options

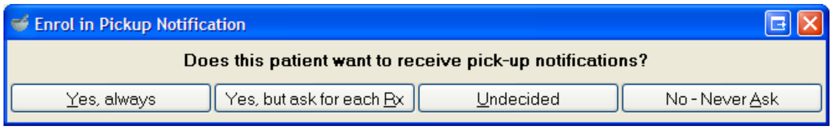
Within Store Configuration there are additional options to make using the Outbound Communications Module easier. These settings determine if the user is prompted to enrol patients in the refill reminder / auto refill and pickup notification programs and to prompt on qualifying Rxs. Note that even with these prompts disabled, you can still enrol patients and Rxs – you just won't be reminded to do so. The following options are located on the **3-Prompting** tab of **File→Configuration→Store→Rx**.



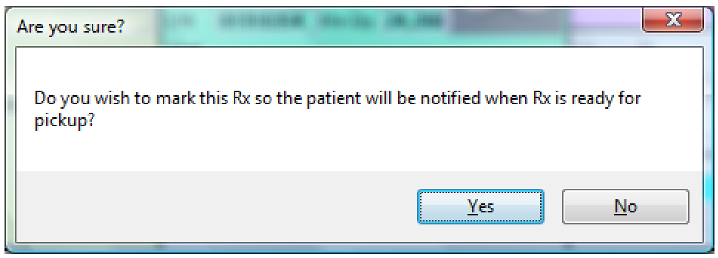
- **Prompt to Enrol Patients in Refill Reminder or Auto Refill Program:** Any time a patient record is created or changed, the following prompt will appear.

  - **Yes:** The cursor is placed on the Refill Type field of the patient card to allow you to easily enter the patient into either program.
  - **No - Never Ask:** This will set the patient's Refill Type to No Auto Fills and you will never be prompted again for this patient.
  - **Undecided:** This leaves the setting at Unknown and will cause the prompt to reappear the next time the patient record is changed.
- **Prompt to Enable Rxs for Refill Reminder and Auto Refill Program**: If the patient is enrolled in the refill reminder or auto refill program, when you are filling an Rx, you will be prompted to make this Rx part of a Refill Reminder or the Auto Refill program depending on which program(s) the patient is enrolled in. Note: if the option **Enable Refill Reminder by default** (shown later) is enabled, the Refill Reminder prompt will not appear because the Rx will be automatically qualified.

- **Prompt to enrol patients for Pickup Notification**: Any time a patient record is created or changed, this prompt will appear.



  - **Yes, always:** This will set the patient's Pickup Notification to **Always Opt In**.
  - **Yes, but ask for each Rx:** This will set the patient's Pickup Notification to **Opt In and for each Rx, you will see this prompt:**



  - **Undecided:** This leaves the setting at Unknown and will cause the prompt to reappear the next time the patient record is changed.
  - **No – Never Ask:** Will set the patient's Pickup Notification to **Opt Out**.

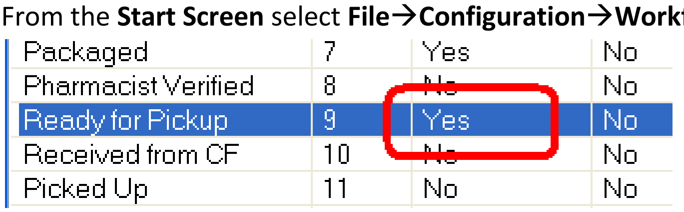
Automatic Rx Qualification

From the **Start Screen** select **File→Configuration→Store→Rx→General**. The option **Enable Refill Reminder by default** will automatically set the Refill Reminder option on the Fill Screen for a new Rx that has repeats (no prompt will appear).

Workflow Configuration for Pickup Notifications

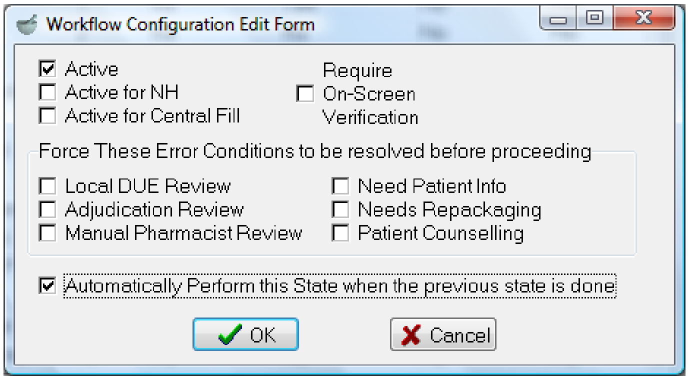
In order to notify a patient when their Rx is ready to pickup, the workflow module must be used to tell the system as to when an Rx reaches this state.

1. From the **Start Screen** select **File→Configuration→Workflow**



Packaged	7	Yes	No
Pharmacist Verified	8	No	No
Ready for Pickup	9	Yes	No
Received from CF	10	No	No
Picked Up	11	No	No

2. The **Ready for Pickup** state must be enabled. Highlight that item and click **F2** to edit the entry.



3. Set each of the different **Active** options that correspond with your workflow process.
4. **Automatically Perform this State when the previous state is done**:
   - If you enable this, when work orders reach this state, they will automatically be placed into the Outbound Communications queue and then immediately moved to the next state, if any. No user intervention is required.
   - With this disabled, a new "Ready for Pickup" state will appear on your Workflow screen. You will need to manually move an Rx to this state in order for it to be placed in the outbound queue.

   Note: If you already have workflow implemented and any of the states after this **Ready for Pickup** state are enabled, you need to initially leave this **Automatic…** option disabled. If you plan to make this state automatic, you must go into your **Workflow→Change Work Order States**, click on the new **Ready for Pickup** state and manually move all qualifying Rxs to the next state. Once all have been moved, return to the configuration setting and enable the **Automatic…** option. This state will no longer appear in the **Change Work Orders** screen as all Rxs from this point on will move through this state automatically.

Using the Outbound Communication Module

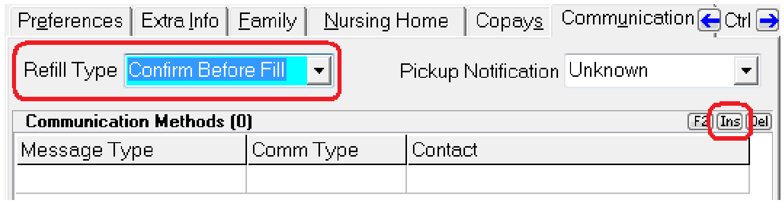
In order for Refill Reminders or Pickup Notifications to work, first the Outbound Communication Module needs to be enabled and set up and then the settings for each patient need to be configured. Once the system is enabled and patients have been enrolled then prescriptions can be flagged to generate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

Configuring Patients for Refill Reminders

To set up a patient for refill reminders:

1. Locate a patient and pull up the Patient Card.
2. Select the **Communications** tab.

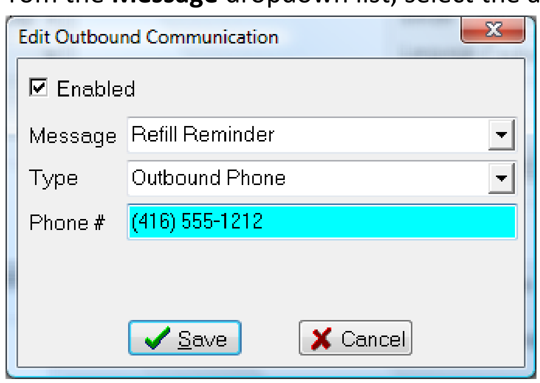
3. Bring down the **Refill Type** dropdown menu and select the applicable option.



- **Unknown**: This is the default setting. If you have prompting enabled, you will be asked if this patient wants to enroll in the pickup notification program.
- **No Auto Refills**: This will disable the Auto Refills feature for this patient and you will not be prompted again.
- **Confirm Before Fill**: This will automatically create or prompt you for a refill reminder for qualifying Rxs for this patient.
- **Auto Fill Pickup** and **Auto Fill Delivery**: These will create a To Do reminder to alert you to refill an Rx at which point you can either contact the patient through a Pickup Notification or just deliver their medications.

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

4. Once the applicable **Refill Type** option has been selected, a **Communication Method** must be chosen:
   - Click **INS** to add a Communication Method.
   - Ensure the **Enabled** option is checked on the **Edit Outbound Communication Window**.
   - From the **Message** dropdown list, select the appropriate message type.



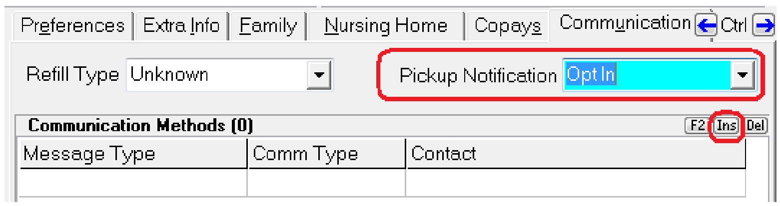
   Note: The types available will depend on the **Refill Type** selected and the **Message Types** enabled through **Store Configuration**.
   - Select one of the available communication types.
   Note: The types available will depend on the **Communication Types** enabled through **Store Configuration**. If you select the **To Do** type, you will also be prompted for a **Notification Type**. That is, when you manually contact the patient, will it be by phone, fax, email, etc.

- Complete the form by entering the patient's contact information (phone number, e-mail address etc).

Configuring Patients for Pickup Notifications

To set up a patient for pickup notifications:

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

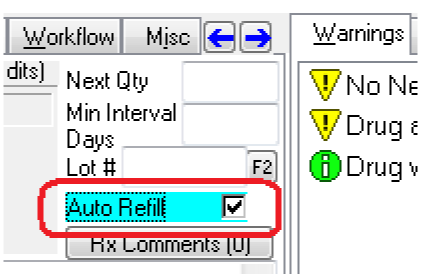


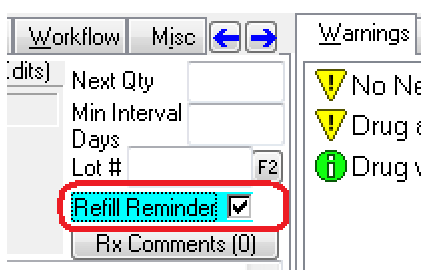
- **Unknown**: This is the default setting. If you have prompting enabled, you will be asked if this patient wants to enroll in the pickup notification program.
- **Opt Out**: This will disable further prompts. This is the setting that will be entered if you selected the **Never Ask** option when prompted. By opting out, you will also not receive any prompts when filling an Rx.
- **Opt In**: At the time of filling an Rx, you will be asked if you want to trigger a pickup notification.
- **Always Opt In**: This will automatically trigger a pickup notification for all Rxs filled for this patient.

4. Just like the **Refill Type**, once the applicable **Pickup Notification** option has been selected, a **Communication Method** must be chosen (see above).

Setting Prescriptions for Refill Reminders / Auto Refill

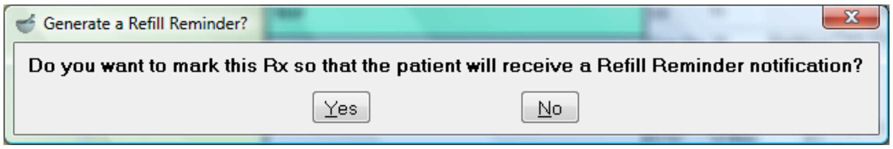
At the bottom of the Fill Screen, you will find an option of either **Auto Fill** or **Refill Reminder** depending on the program that the patient is enrolled in.





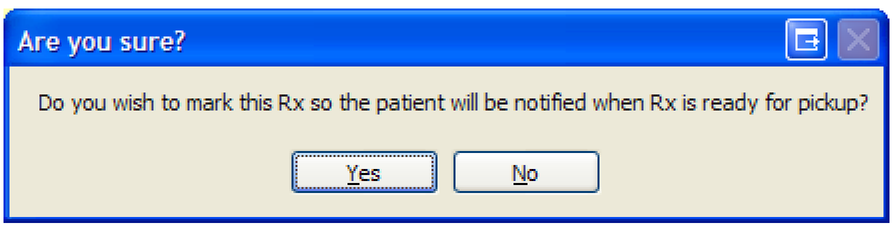
If you have the **Enable Refill Reminder by default** option enabled and this Rx has repeats, this Fill Screen option will automatically be enabled.

If you have **Prompt to Enrol Patients in Refill Reminder or Auto Refill Program** enabled and you have not manually checked this Fill Screen option, you will receive one of these prompts:



Creating Pickup Notifications

If the patient is configured with a Pickup Notification type of "Opt In", at the time of filling an Rx, you will receive the following prompt:



Answer "Yes" to activate the pickup notification using the contact information already recorded on the patient record.

For any Rx, a temporary pickup notification can also be created. This can be used when someone else is picking up the Rx for this patient. The patient does not need to be enrolled in the pickup notification program but if they are, you can use this to override their notification information for this Rx without affecting their regular contact information.

To create a temporary pickup notification, from the Rx menu of the Fill Screen, select Pickup Notification→Customer Waiting. You will be prompted to enter the pickup type and contact information for this Rx. Note that this information is only used for this specific fill – it will not be used on refills for the same Rx.

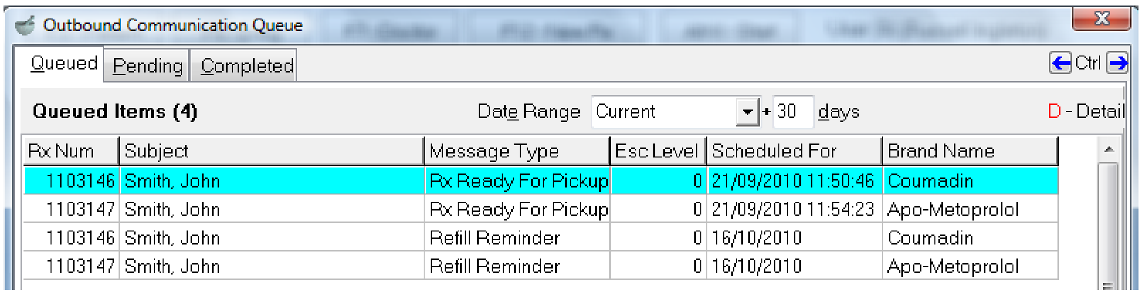
Pickup Notifications – Workflow

If the only active workflow state is **Ready For Pickup**, and if you have it set to **Automatically Perform this State when the previous state is done,** the Rx will be sent to the Outbound Communications queue as soon as it is filled. However, if you have additional workflow states enabled, you must complete the workflow state immediately prior to **Ready For Pickup** (if **Automatically Perform…** is enabled) or you will have to manually move the Rx to this state (if **Automatically Perform…** is disabled) before the Rx is sent to the queue.

The Outbound Communications Queue

Refill Reminders configured as To Do types will appear in the To Do screen on their due date but all other communication types will be sent to the Outbound Communications queue. At any time, 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→Outbound Communications→View Queue**.

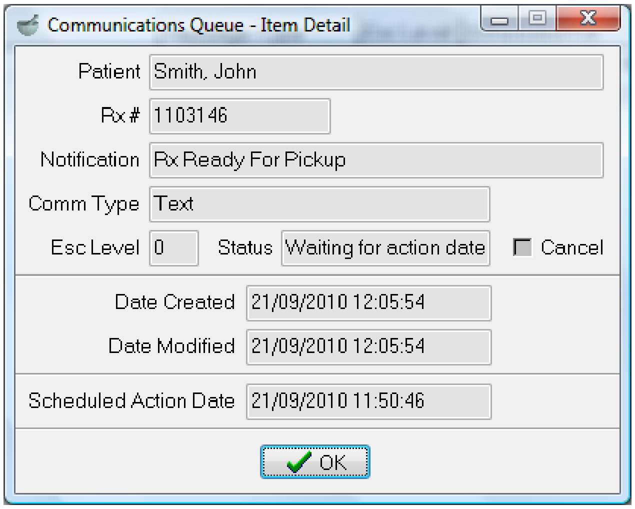


Rx Num	Subject	Message Type	Esc Level	Scheduled For	Brand Name
1103146	Smith, John	Rx Ready For Pickup	0	21/09/2010 11:50:46	Coumadin
1103147	Smith, John	Rx Ready For Pickup	0	21/09/2010 11:54:23	Apo-Metoprolol
1103146	Smith, John	Refill Reminder	0	16/10/2010	Coumadin
1103147	Smith, John	Refill Reminder	0	16/10/2010	Apo-Metoprolol

2. There are three tabs in the **Outbound Communication Queue** window:
   - **Queued**: Communications that have not yet been pushed to the IVR/third party system.
   - **Pending**: Communications have been pushed to the IVR/third party system, but have not yet been delivered to the recipient and/or no response from the recipient has been received.
   - **Completed**: Items that no longer require any further communications with the IVR system. These items may have been responded to by the patient, possibly resulting in an Rx being placed into the To Do screen or a patient may have refused a refill request. In some cases, an item may have reached the end of its escalation process or there may be errors that prevent this item from proceeding any further.

     Note: Entries can be filtered to a particular **Date Range** by selecting **Current +___ days** or by choosing the **All** range.
3. Queued items are sorted in order by the most recently **Scheduled For** entry. However, you can reorder the items by clicking on any of the column headers. Clicking on the same column header a second time will reverse the sort order.
4. It is also possible to change which columns are displayed in the grid. Right click any one of the column headers and select **Change Columns**.

5. To look at the details of any one item, highlight the item and press **D – Detail**.



6. Typically every 60 seconds, all items in the **Queued** tab that have reached their **Scheduled Action Date** are sent to the IVR system. Every three minutes, the IVR system is polled for messages and updates to any **Pending items**.

Kroll Helpdesk Information

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