Documenting Patient Non-Influenza Immunization

Manitoba
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Documenting Patient Non-Influenza Immunization

Immunization is one of the most important and cost-effective public health innovations. In Canada, immunization has saved more lives than any other health intervention, and has contributed to the reduction in morbidity and mortality from a broad range of vaccine-preventable diseases in adults, children and other vulnerable populations.

Immunization providers are responsible and accountable to ensure that the information entered is accurate, timely, and in accordance with their particular professional practice standard. The pharmacist/health care provider must keep a permanent record of immunization history by ensuring the documentation includes the following required information:

- Client’s name
- Health Card Number (HCN)
- Vaccine Name
- Lot number
- Dose number in series
- Route administered
- Immunization site
- Dose
- Signature of immunizer
- Date of immunization
- Adverse events following immunization

**Note:** Your pharmacy must have Kroll V10 SP11 or higher in order to use this functionality.
Non-Influenza Immunization Module Features

The Immunization module introduces a simple and streamlined approach to managing and documenting administered non-influenza immunizations in Kroll that will improve the way your pharmacy manages non-influenza immunizations. The features that this functionality will provide are:

- All immunization records are saved to the Immunization section of the patient card, separate from all other patient records.
- Screening questions are used to determine if the patient is eligible for immunization; answers to these questions are stored in the database and are viewable from the patient card.
- Vaccine administered, lot number, expiry date, time and date of immunization, route and site of administration, dose, and pharmacist information is recorded.
- Signatures can be captured on-screen or on paper, giving your pharmacy flexibility in how immunizations are handled.
- In Electronic Mode, the billing process has been streamlined to facilitate faster and more accurate billing.
- Emergency contact information is recorded.
Store Level Configuration

Configuration settings for the Immunization module are located in the Store Level Configuration Parameters screen (File > Configuration > Store > Rx > 8 - Immunization). Each of the settings on this screen is explained below.

- **Enable electronic immunization**: Turns on electronic immunization functionality. When this setting is enabled, all immunization documentation takes place on-screen; when it is disabled, immunization documentation is recorded in paper mode.

- **Require electronic signature for Pharmacists**: Requires the pharmacist to record an electronic signature using a digital signature tablet. Note that electronic signature functionality must be setup in order to use this feature.

- **Require UPC Verification of Vaccine Product**: Requires the user to scan or enter the UPC number associated with the administered vaccine.

- **Allow to use non-influenza immunization products obtained externally**: Allows pharmacist to accept non-influenza immunization products for injection in the following two scenarios:
  - Patient brings in product that was dispensed from another pharmacy
  - When patient is required to take more than one injection of a product on separate days, and is coming in to the same pharmacy the product was dispensed to them with the second or third vaccine of the same product.

- **Allow to use non-influenza immunization Rx dispensed ___ days ago**: Allows pharmacist to put an expiry date for number of days from when an Rx is dispensed to be treated as a recently dispensed Rx.
Drug card Configuration

Creating Non-influenza Immunization Drug card

To change the Drug card type to Non-influenza Immunization:

- On the Drug Card Type drop down textbox, select Non-Influenza Immunization.

The following table is a list of immunizations that require the Drug card Type to be set to Non-Influenza Immunization:

<table>
<thead>
<tr>
<th>Name</th>
<th>Brands</th>
<th>DIN</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hepatitis A (Havrix/Avaxim/Vaqta)</td>
<td>Avaxim</td>
<td>02237792</td>
</tr>
<tr>
<td></td>
<td>Avaxim Pediatric</td>
<td>02243741</td>
</tr>
<tr>
<td></td>
<td>Vaqta</td>
<td>02229702</td>
</tr>
<tr>
<td></td>
<td>Havrix</td>
<td>02187078</td>
</tr>
<tr>
<td></td>
<td>Havrix Pediatric</td>
<td>02231056</td>
</tr>
<tr>
<td>Hepatitis B (Engerix B/Recombivax HB)</td>
<td>Engerix B</td>
<td>01919431</td>
</tr>
<tr>
<td></td>
<td>Engerix B Pediatric</td>
<td>02296454</td>
</tr>
<tr>
<td></td>
<td>Recombivax HB( 5mcg/0.5ml,10mcg/ml)</td>
<td>02243676</td>
</tr>
<tr>
<td></td>
<td>Recombinax HB 40mcg/ml</td>
<td>02245977</td>
</tr>
<tr>
<td>Hepatitis A &amp; Typhoid (Vivaxim)</td>
<td>Vivaxim</td>
<td>02248361</td>
</tr>
<tr>
<td>Herpes Zoster (Zostavax II)</td>
<td>Zostavax</td>
<td>02375516</td>
</tr>
<tr>
<td>Japanese Encephalitis (Ixiaro)</td>
<td>Ixiaro</td>
<td>02333279</td>
</tr>
<tr>
<td>Pneumococcal – polysaccharide</td>
<td>Pneumovax</td>
<td>00431648</td>
</tr>
<tr>
<td>Hepatitis A &amp; B (Twinrix)</td>
<td>Twinrix Adult</td>
<td>02230578</td>
</tr>
<tr>
<td></td>
<td>Twinrix Pediatric</td>
<td>02237548</td>
</tr>
<tr>
<td>Pneumococcal - conjugate (Prevnar 13)</td>
<td>Prevnar 13</td>
<td>02335204</td>
</tr>
<tr>
<td>Meningococcal - Group C (Menjugate)</td>
<td>Menjugate</td>
<td>02243820</td>
</tr>
<tr>
<td>Typhoid (Typhim Vi/Typherix)</td>
<td>Typhim Vi</td>
<td>02130955</td>
</tr>
<tr>
<td></td>
<td>Typherix</td>
<td>02242727</td>
</tr>
<tr>
<td>HPV (Gardasil 9/Cervarix)</td>
<td>Gardasil 9</td>
<td>02437058</td>
</tr>
<tr>
<td></td>
<td>Cervarix</td>
<td>02342227</td>
</tr>
<tr>
<td>Rabies (Imovax Rabies/Rabavert)</td>
<td>Imovax</td>
<td>01908286</td>
</tr>
<tr>
<td></td>
<td>Rabavert</td>
<td>02267667</td>
</tr>
<tr>
<td>BCG (Immucyst) Tuberculosis</td>
<td>Immucyst</td>
<td>02194376</td>
</tr>
<tr>
<td>Varicella (Varivax/Varilrix)</td>
<td>Varivax 111</td>
<td>02246081</td>
</tr>
<tr>
<td></td>
<td>Varilrix</td>
<td>02241047</td>
</tr>
<tr>
<td>Meningococcal - Group B (Bexsero)</td>
<td>Bexsero</td>
<td>02417030</td>
</tr>
<tr>
<td>Meningococcal - Group ACYW-135 (Menactra/Menveo)</td>
<td>Menactra</td>
<td>02279924</td>
</tr>
<tr>
<td></td>
<td>Menomune</td>
<td>00588490</td>
</tr>
<tr>
<td></td>
<td>Menomune</td>
<td>01959018</td>
</tr>
<tr>
<td>Haemophilus Influenzae Type B (Act-HIB)</td>
<td>Act-HIB</td>
<td>01959034</td>
</tr>
<tr>
<td>Yellow Fever - Designated Sites Only (YF-Vax)</td>
<td>YF-VAX</td>
<td>00428833</td>
</tr>
</tbody>
</table>

Note: The list of Non-Influenza Immunizations is neither an extensive list nor a list in which all that are listed are distributed or used in all provinces.
Creating Administration Fee on Drug card

After creating a Drug Card, to bill the cost of administering a Non-influenza Immunization, ensure the following changes are made:

1. On the Fee for Service dropdown textbox, select Non-influenza Immunization. This ensures that the drug card is recognized as a Non-influenza fee for service.

2. On the Price group dropdown textbox, select Non-influenza fee for service.

3. On the bottom half of the drug card, click the General tab, and input service fee charge in the selling field. This is the service that is charged to the patient for injecting the Non-influenza Immunization.

**Note:** This option is provided to pharmacies that are in provinces in which they are not paid by the government for fee for service for administrating a Non-influenza Immunization.
Paper Mode

Immunizations documented in Paper Mode are printed from the patient card, completed on paper, and scanned back into Kroll using the Document Scan Utility.

Enabling Paper Mode

**Note:** The ‘Enable electronic immunizations’ configuration setting (File > Configuration > Store > Rx > 8 - Immunization) must be disabled in order to record immunizations in Paper Mode.

![Configuration Settings](image)

**Note:** Ensure that the Drug card is configured appropriately. Please refer to [Drug card Configuration](#).

Creating a Paper Immunization Record

1. Call up a patient card using the **F3 - Patient** search.
2. On right navigation pane, under the **View** section, click **Immunizations**.

![Patient Card](image)

‘Immunizations’ window appears.
3. Click N - New Immunization or click Ins.

4. Select Non-Influenza in the Type drop down list, and click Print Now.

The ‘Immunization Report’ window appears.

5. Modify options on Options tab if needed.
6. Click Print. The ‘Immunization Record’ prints. Provide this printout to the patient for him or her to fill out. Have the pharmacist complete the PHARMACY USE ONLY portion.

Immunization Record (patient portion):
Documenting Patient Non-Influenza Immunization – MB

Immunization Record (pharmacy portion):

<table>
<thead>
<tr>
<th>Product</th>
<th>DINV</th>
<th>Exp Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Allect 0.15mg/0.15ml (Pack Size 1 PEN)</td>
<td>008906059</td>
<td></td>
</tr>
<tr>
<td>Allect 0.3mg/0.3ml (Pack Size 1 PEN)</td>
<td>008906070</td>
<td></td>
</tr>
<tr>
<td>Epinephrine Injection 1mg/mL (Pack Size 1 SOLUTION)</td>
<td>008906225</td>
<td></td>
</tr>
<tr>
<td>Epinephrine 1mg/ml (Pack Size 1 PEN)</td>
<td>008906558</td>
<td></td>
</tr>
</tbody>
</table>

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<th>Product</th>
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<td></td>
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<td>Allect 0.3mg/0.3ml (Pack Size 1 PEN)</td>
<td>008906070</td>
<td></td>
</tr>
<tr>
<td>Epinephrine Injection 1mg/mL (Pack Size 1 SOLUTION)</td>
<td>008906225</td>
<td></td>
</tr>
<tr>
<td>Epinephrine 1mg/ml (Pack Size 1 PEN)</td>
<td>008906558</td>
<td></td>
</tr>
</tbody>
</table>

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On the ‘Immunizations’ screen the status of the Non-influenza is as follows.
Scanning a Paper Immunization Record

Once the Immunization Record is printed, the Immunization Record needs to be scanned.

**Note:** If you will be scanning all immunization records in a single batch at the end of the day, skip these steps and continue to the Billing an Immunization section.


![Alt+X - Start screen with Utilities selected]

The ‘Import Scanned Documents’ window appears.

8. Place the report pages in the scanner hopper.

9. Check **Scan both sides of paper** if you are scanning pages with information on both sides and your scanner supports dual side scanning.

![Import Scanned Documents window]

- **Start Scanning** button
- **Scan both sides of paper** checkbox
- **View Scan History** button
- **Close** button
10. Click **Start Scanning**. When scanning is complete, Prompt ‘**Do you want to scan another page/batch?**’ appears.

![Scan another Page](image)

11. Click **Stop Scanning**. The ‘**Document Scan Reconciliation**’ screen appears.

![Document Scan Reconciliation](image)

**Note:** Items ready to be processed displays in the **Documents to be created** section. Items that need to be reconciled are displayed in the **Unprocessed Images** section.
12. Click **Process pending Documents**.

Document is reconciled successfully.

14. On **Import Scanned Documents** window, click **Cancel** to close the screen. Once scanning is complete, the **Status** of the immunization record will change from **Printed Consent** to **Signed Consent**.

**Note**: The report will be saved to the Immunization record and to the **Documents** section of the **F3 - Patient** card.
Billing Product

To Bill a Product:

15. Click F- Claim fee or press F on the keyboard. ‘F-5 Drug search’ screen appears.

16. Search and select a Non-Influenza Immunization. Drug card appears.

17. Click F12 – Return Rx. ‘F12’ screen appears.
18. Fill in all mandatory fields.

**Note:** Regardless of whether the vaccine Rx is in schedule 1 or schedule 2, the doctor field will be blank.

‘Vaccine Rx in Schedule 1’ needs to be prescribed in order for the Rx to be dispensed to the patient. Currently those who can prescribe Rxs are doctors.

‘Vaccine Rx in Schedule 2’ can be obtained through prescription or over the counter.

If a patient wants to get a ‘Vaccine Rx in schedule 2’ through prescription, then the Rx can be filled out normally.

If a patient wants to get a ‘Vaccine Rx in schedule 2’ over the counter, then click **Make Rx Not Dispensed** before filling the Rx.

19. Click **F12- Fill Rx**. ‘**F-5 Drug search**’ screen reappears.

**Note:** On the **Immunizations** screen the **Product Status** of the Non-Influenza changes from **Pending Claim**, to **Claimed**.
Billing Service Fee

20. On the ‘F-5 Drug search’ screen, search and select the **Non-Influenza Immunization fee for service**.

![Image of F-5 Drug search screen with Non-Influenza Immunization fee highlighted]

Drug card appears.

![Image of Drug card with Non-Influenza Immunization fee selected]

22. Input mandatory fields.

23. Click F12 – Fill Rx or press F12 on your keyboard. Fee is billed successfully and label is printed.

24. If structured workflow is activated the Rx will follow the workflow configuration that is dictated.

Note: if structured workflow is not activated, Immunization screen displays with Immunization Rx status.

25. Complete all remaining workflow steps as required.

26. Click Approve. ‘Workflow’ screen closes and Patient card’s ‘Immunizations’ screen appears. The Non-influenza has the following status: Status = Signed Consent, Product Status = Claimed and Fee Status = Claimed.

Note: If Free for service was selected in the Fee field on the Administration tab. The ‘Immunizations’ screen displays the same as above, except Fee status = No Fee Applicable.
Completing Immunizations ‘Saved for Later’

Immunization records that have been ‘saved for later’ can be accessed either via the F3 - Patient card or the F9 - Workflow card.

1. Call up the patient using the F3 - Patient search or select F9 - Workflow.
2. On right navigation pane, under the View section, click Immunizations.
3. Select the immunization record you want to complete and click F - Call up.

Recording Emergency Epinephrine Shots

An emergency Epinephrine shot may need to be administered if the patient has a reaction to the immunization. This section explains how to add Emergency Epinephrine shot records to an immunization record.

**Note:** Emergency Epinephrine shots can only be added to immunization records that have a status of Completed.

1. Call up a patient using the F3 - Patient search.
2. On right navigation pane, under the View section, click Immunizations.
3. Right-click a completed immunization record and select Add Epinephrine shot.

<table>
<thead>
<tr>
<th>Product</th>
<th>Disp Cty</th>
<th>DIN</th>
<th>UPC</th>
</tr>
</thead>
<tbody>
<tr>
<td>Route</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Pseudo DIN</th>
<th>Lot Number</th>
<th>Expiry Date</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Product

4. If the ‘Require UPC verification’ configuration setting is enabled, scan or enter the UPC from the drug pack. If a UPC match is found, product information will populate.

You may need to manually enter the lot number and expiry date if this information is not stored in the product barcode.
If the ‘Require UPC verification’ configuration setting is disabled, select a product from the list. Enter the Lot Number and Expiry Date associated with the drug.

5. Click Next. The ‘Administration’ tab appears.
Administration

6. Enter the site of administration in the Site of Admin field (e.g., left arm, right thigh).

7. Select the pharmacist who administered the shot from the Administered by list.

8. Enter any comments in the space provided (optional).

9. Click Finalize Immunization. ‘F12’ screen appears.
Billing Product

10. Input mandatory fields.

**Note:** If the user who performed the immunization has an F7 - Doctor record with a ‘Pharmacist’ designation, that user’s information will populate in the doctor section of the F12 screen.

If the user does not have an F7 - Doctor record or if the immunization was performed by a different user, the F7 - Doctor search form will appear. Perform a doctor search to locate the pharmacist to use as the prescriber.

11. A claim for the treatment will populate in the F12 screen. Enter a Disp Qty of ‘1’ to represent the number of administered treatments.

12. Click F12 - Fill Rx or press F12 on your keyboard. The claim will be transmitted to the appropriate party for payment and label is printed.

13. Complete all remaining workflow steps as required.

14. A record of the emergency Epinephrine show will be added to the Immunizations list with a Status of ‘Completed’ and a Product Status of ‘Claimed’.

**Note:** Repeat these steps for each Emergency Epinephrine shot that is administered to the patient.
Reprinting an Immunization Record

This section explains the process for reprinting immunization records. Immunizations can be reprinted either via the F3 - Patient card or the F9 - Workflow card.

On the F3-Patient card and F9 – Workflow card, the immunization record can be reprinted:
- If the Status is either Printed Consent or Signed Consent, the Product status and Fee status does not affect being able to reprint the immunization record.

Note: for F9 – Workflow card if both Product status and Fee status are both ‘Complete’, the immunization record does not appear.

1. Call up the patient using the F3 Patient search, or select F9 - Workflow.
2. On right navigation pane, under the View section, click Immunizations.
3. Select the appropriate immunization record and click P - Print/Reprint. The ‘Immunization Report’ window appears.

4. Select the number of Epinephrine Emergency Treatments that need to be printed in the report.

5. Click Print. The selected record generates.
Viewing Immunization Record Details

This section explains the process for viewing immunization records. Immunizations can be viewed via the F3 - Patient card.

On the F3-Patient card, the immunization record can be reprinted:

- If the Status is either Printed Consent or Signed Consent, the Product status and Fee status does not affect being able to view the immunization record.

1. Call up the patient using the F3 Patient search.
2. On right navigation pane, under the View section, click Immunizations.
3. Call up the record by doing one of the following:
   - Right-click the record you want to view and select View Details;
   - Select the record and press F2;
   - Double-click the record.

The ‘Immunization View’ screen appears.
If the immunization record has not yet been scanned into the system, a blank screen showing ‘No Scanned Documents Found’ appears.

If the immunization record has been scanned into the system the scanned record displays in the ‘Immunization View’ screen. From here you can adjust the brightness, contrast, and saturation of the record, or print the record.

Electronic Mode

Immunizations documented in Electronic Mode are completed on-screen in the Immunizations section of the patient card. A digital signature pad can be used to capture pharmacist signatures electronically, or the completed record can be printed, signed, and scanned into Kroll using the Document Scan Utility.

Enabling Electronic Mode

To conduct immunizations in Electronic Mode:

1. Click File > Configuration > Store > Rx > 8 – Immunization.
2. Click the checkbox in front of Enable electronic immunizations so that a checkmark appears (checkmark = enabled).

Allowing use of Non-Influenza Immunization Products Obtained Externally

To allow using non-influenza immunization products obtained externally by patients:

3. Click the checkbox in front of Allow to use non-influenza immunization products obtained externally so that a checkmark appears (checkmark = enabled).

Note: Enable this option only if you are willing to administer a vaccine that was dispensed externally.

The following two scenarios are when a vaccine is considered to be external:
- When patient brings in immunization product that was dispensed from another pharmacy
- When patient is required to take more than one injection of an immunization product on separate days, and is coming in to the same pharmacy with the immunization that was dispensed to them with the second or third vaccine of the same product
Allowing to use Non-Influenza Immunization Rxs Dispensed within ___ Days

To set number of days a non-influenza immunization Rx can be used after it has been dispensed:

4. Input number of days in ‘Allow to use non-influenza immunization Rxs dispensed ___ days ago,’ and then click OK.

Prior to Filling out an Immunization

Please ask patients whether they are planning on getting the injection done with the pharmacy or with a doctor.

If the patient is planning on getting the injection done by a doctor:

1. Fill the Non-influenza Immunization Rx like any other Rx using the F12 – new Rx screen.
2. After dispensing the product to the patient, if the patient changes their mind and wants the pharmacist to inject the product follow one of the following scenarios depending on how long ago the product was dispensed:
   - Scenario 2: if the patient brings in a recently dispensed product that is within the number of days set by the pharmacy of allowing using the Non-Influenza immunization Rx.
   - Scenario 4: if the patient brings in a product that was dispensed at a different location or if a patient brings in product that was dispensed more than the days set out by the pharmacy in accepting the Rx.

If the patient is planning on getting the injection done by a pharmacist:

- Follow the procedure outlined in one of the following 4 scenarios explained below that applies.
Introduction of the 4 scenarios in the Electronic Mode

Scenario 1: Fill a new Rx – This option is always available in Rx Options.
This option is used when you want to fill and dispense a new Rx for the patient.

Scenario 2: Use an existing Rx recently dispensed – This option is ONLY available in Rx Options when the Rx was submitted, completed, and dispensed recently. An Rx that is defined as dispensed recently falls within the number of days set by the pharmacy in Allow to use non-influenza immunization Rx dispensed __ days ago option, in File > Configuration > Store > Rx > 8 – Immunization.
This option is used when the patient comes with the Non-influenza Immunization product into the same pharmacy that recently submitted, completed, and dispensed the Rx within the days set by the pharmacy.
Scenario 3: **Refill an existing immunization Rx** – This option is ONLY available in Rx options when there is a Vaccine Rx in Patient profile with a refill(s) remaining.

This option is used when a non-influenza immunization has more than one injection that needs to be taken by the patient. For example first injection on day 0, second injection on day 30, and third injection on day 60. The second and third injection will fall under **Refill an existing immunization Rx** if the patient decides to purchase the immunizations when they come in for the injection.

Scenario 4: **Use a product obtained externally** – this option is ONLY available when user enables **Allow to use non-influenza immunization products obtained externally** option, in File > Configuration > Store > Rx > 8 – Immunization.

This option is used in two situations:

- When patient brings in immunization Rx that was dispensed from another pharmacy
- When a non-influenza immunization has more than one injection that needs to be taken by the patient. For example first injection on day 0, second injection on day 30, and third injection on day 60. If the second and third Immunization Rx were purchased and dispensed to the patient along with the first immunization. Then when the patient comes in with the second or third immunization they are treated as products obtained externally.
Scenario 1: Filling a New Rx for a Patient

Fill a new Rx for a patient appears in the Rx Options Drop down menu as an option in all scenarios. This option is used when you want to fill and dispense a new Rx for the patient.

1. Call up a patient card using the F3 - Patient search.

2. On right navigation pane, under the View section, click Immunizations.

3. Click N - New Immunization or click Ins.

'Immunizations' window appears.
4. On the **Type** drop down list, select **Non-Influenza** and then click **Perform Now**. Immunization wizard begins.

![Immunization wizard](image)

**Note:** If you want to add the immunization record to the Immunizations queue in order to complete the immunization form later, click **Save for Later**. ‘Immunization’ screen appears. The status of the Non-influenza immunization is as follows.

User is brought back to ‘Immunization’ screen; The Non-influenza Immunization has the following status.

![Immunization status](image)

See the [Completing Immunizations ‘Saved for Later’](#) section for more information.

**Rx**

The Rx section consists of whether the product was dispensed now or earlier, and whether it was dispense from the current pharmacy or externally, the name of the product, the pack size and UPC of the product. To fill in the Rx information:

5. On the **Rx** tab, click the **Rx Options** drop down textbox, and select **Fill a new Rx**.

![Rx options](image)
Product, Packsize, and UPC fields display with blank fields.

6. On the **Product** drop down textbox select a product. The PackSize and UPC fields are automatically populated. The ‘Next’ button is enabled.

**Note:** Optional - You can press F5 on the keyboard to view the Drug card and the details of the product, and then click Close.

7. Click Next. ‘Emergency contact’ tab appears.
Emergency Contact

The emergency contact will be contacted in the event of an emergency.

8. Search for and select an emergency contact.

9. Specify the contact’s Relationship to the patient and enter their phone number(s).

**Note:** If the patient has an emergency contact saved to the F3 - Patient card (Other tab), the contact’s information prepopulates in the Emergency Contact fields and the ‘Patient Consent’ tab appears.

If the patient has more than one emergency contact saved to the F3 - Patient card, select the desired contact from the list.

10. Click Save to Patient, to save the emergency contact to the F3 - Patient card. The emergency contact is inserted in the Other tab in the F3 - Patient card.

11. Click Next.

**Note:** A daytime phone number for the emergency contact is required to proceed.

12. Click Next. ‘Patient Consent’ tab appears.

Patient Consent

The Patient Consent consists of questions that will determine whether the patient is eligible to get the injection. To fill in the Patient consent section:

13. Select the appropriate answer for each of the Patient Consent questions.

- Some answers will not allow the patient to receive the immunization.

  For example, if the patient answers Yes to ‘Are you sick today?’, he or she will be ineligible for immunization.

- Some answers may present a note to the pharmacist.

  For example if the patient answers Yes to ‘Are you allergic to latex gloves?’, a note displays instructing the pharmacist to not use latex products.
Note: For question Pharmacist - Will you be administering a Live Vaccine?

a. If user clicks Yes, 4 additional questions display below for the patient to answer.
b. If user clicks No, no additional questions display below.
If the system determines the patient is ineligible for immunization, all consent questions will become read-only. Click Refuse Immunization and complete the Enter a Comment form. See the Declined or Refused Immunizations section for more information.

14. Once the patient has answered each of the Patient Consent questions and the pharmacist has determined the patient is eligible for immunization, click Print Consent. The ‘Immunization Report’ window appears.

**Note:** All questions must be answered in order to proceed.
15. Click Print Consent. The ‘Immunization Report’ window appears. The Non-Influenza Consent Form prints. This form shows each of the Patient Consent questions and their answers for the patient to review.

If No is answered to the question Pharmacist-Will you be administering a Live Vaccine?, then the following Consent form is printed.
If **Yes** is answered to the question **Pharmacist-Will you be administering a Live Vaccine?**, then the following Consent form is printed.

![Image of Consent Form]

---

### Non-Influenza Vaccine Consent Form

**Wendell's Pharmacy, 220 Duncan Mbl Road, d0133 AB: 333333333**

#### PATIENT INFORMATION

<table>
<thead>
<tr>
<th>First Name</th>
<th>Last Name</th>
<th>Date of Birth</th>
<th>Gender</th>
<th>Phone Number</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>M</td>
<td><em>(416) 555-5555</em></td>
</tr>
</tbody>
</table>

#### SCREENING QUESTIONNAIRE

The following questions will help us determine if there is any reason you or your child should not get the vaccine today. If you answer **Yes** to any question, it does not necessarily mean the shot cannot be given. It simply means additional questions must be asked. If a question is not clear, please ask your pharmacist to explain it.

- **Are you sick today?** (i.e., fever greater than 38.3°C, breathing problems, or active infection)
- **Are you allergic to any medications including vaccines?**
- **Do you have an allergy to latex, neomycin, penicillin, thimerosal, chicken protein, or gelatin?**
- **Have you ever had a severe, life threatening reaction to a past vaccination?**
- **Have you had wheezing, chest tightness or difficulty breathing within 24 hours of getting a vaccine?**
- **Are you allergic to latex gloves?**
- **Have you had Guillain-Barre Syndrome within 6 weeks of getting a vaccine?**
- **Do you have a new or changing neurological disorder?**
- **Do you have a blood thinner or have a bleeding disorder?**
- **Pharmacist: Will you be administering a Live Vaccine?**
- **Do you have a medical condition that can weaken your immune system? (e.g., Leukemia, Lymphoma, HIV/AIDS)**
- **Are you taking any medications that can weaken your immune system within the last 3 months? (e.g., Prednisone etc)**
- **Have you received any other vaccines in the last 4 weeks?**
- **Are you or do you think you might be pregnant?**

#### CONSENT GIVEN BY PATIENT

I, the undersigned client, parent, or guardian, have read and/or heard explained to me information about the vaccine as outlined in the Vaccine Information Sheets provided to me. I have had the chance to ask questions, and answers were given to my satisfaction. I understand the risks and benefits of receiving the vaccine. I agree to read the pharmacy for 15 minutes after receiving the vaccine. I am aware that if I am unable to receive the vaccine I will receive a copy of this form containing information on emergency treatments that I had received, or a copy will be provided to my agent or EMS paramedics.

**Confirm that I want to receive** **Auram 1600** **Vacc**

**Patient**

<table>
<thead>
<tr>
<th>Patient Name</th>
<th>Patient Signature</th>
<th>Date Signed</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>26-Aug-2017</td>
</tr>
</tbody>
</table>

**PHARMACIST DECLARATION**

I confirm the above named patient is capable of providing consent for **Auram 1600** and that the **Auram 1600** should be given to patient.

**Pharmacist**

<table>
<thead>
<tr>
<th>Pharmacist Name</th>
<th>Pharmacist Signature</th>
<th>Date Signed</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>26-Aug-2017</td>
</tr>
</tbody>
</table>
16. After printing the report, the ‘Scan Consent’ tab appears.

The following 3 options become available if you have a document scanner:

- **Scan Patient Consent Form**: Allows you to scan the patient consent form into the system.

- **Select from Network Scan**: If you have already scanned the signed consent form and the file is saved to the network, select this option to import the form.

- **Proceed without Scan**: Allows you to continue processing the immunization without importing the signed consent form. All consent forms can then be scanned at the end of the day using the Document Scan Utility.

The following 3 options become available if you do not have a document scanner:

- **Select from File**: If you have already scanned the signed consent form and the file is saved to a local directory, select this option to import the form.

- **Select from Network Scan**: If you have already scanned the signed consent form and the file is saved to the network, select this option to import the form.

- **Proceed without Scan**: Allows you to continue processing the immunization without importing the signed consent form. All consent forms can then be scanned at the end of the day using the Document Scan Utility.

17. Click **Proceed without Scan**. Prompt ‘Are you sure you want to proceed without scanning the signed consent form? You will need to retain the signed paper copy for your records.’ with options **Yes** and **No**.

18. Click **Yes**. The ‘Product’ tab appears.
Product

The product tab requires details of the product that will be administered, such as dispense quantity, Lot Number, and Expiry date, this section is used to submit and claim the Rx. To Fill in the product section:

19. If the ‘Require UPC verification’ configuration setting is enabled, scan or enter the UPC from the drug pack. If a UPC match is found, product information will populate. The ‘Bill Product’ button is enabled.

Note: You may need to manually enter the lot number and expiry date if this information is not stored in the product barcode.

If the ‘Require UPC verification’ configuration setting is disabled, select a product from the list. Enter the ‘Disp Qty’, ‘Lot Number’, and ‘Expiry Date’ fields associated with the drug. The ‘Bill Product’ button is enabled.
Billing product

To Bill a product:

20. Click **Bill Product**. ‘F12 – Fill Rx’ screen appears. Except initial field, all other fields are prepopulated with a value.

**Exception:** The Doctor Field can either be blank or be auto populated with the pharmacist’s information.

‘Vaccine Rxs in schedule 1’ can only be prescribed by a doctor, and not by a pharmacist. In these scenarios the Doctor Field is not auto populated with the pharmacist’s names but rather left blank so that the doctor’s information can be inputted.

‘Vaccine Rxs in schedule 2’ does not require a prescription, thus the pharmacist’s name is auto populated in the doctor field.

21. Input your initials, and if needed doctors’ information in the appropriate fields.

22. Click **F12 – Fill Rx** or press **F12** on your keyboard. Rx submitted and claimed. Non-influenza wizard redisplays at the Administration tab.

Administration

The administration section will consist of information in regards to date of administration, site of administration on the body, and whether a service fee is charged. To fill in the Administration section:

23. Enter the site of administration in the **Site of Admin** field (e.g., left arm, right thigh)
24. Select the pharmacist who administered the shot from the Administered by list.

**Note:** If the Administered by user is not the currently logged in user, the Administered by user will be required to enter their login credentials in order to proceed.

25. On the Administration Fee drop down textbox, select whether or not to charge for the service provided. The 'Finalize Immunization' button is enabled.

26. Enter any comments in the space provided (optional).

27. Click Finalize Immunization.
28. If you have electronic signatures enabled, the pharmacist will be prompted to sign the signature pad in order to proceed. Sign the signature pad and click OK.

29. Prompt ‘Do you want to print Immunization Record for the patient?’ with options Yes and No.

30. Click Yes. Record is printed. ‘F12’ screen displays to bill the fee for service for non-influenza immunization.

**Note:** If No is clicked instead, record is not printed.
Billing Service Fee

Once Immunization is finalized and an Immunization record is printed, and Non-influenza Immunization service fee was selected in the Fee field on the Administration tab, the Immunization can be billed. To bill an Immunization:

31. Input mandatory fields.

32. Click F12 – Fill Rx or press F12 on your keyboard. Fee is billed successfully and label is printed.

33. If structured workflow is activated the Rx will follow the workflow configuration that is dictated.

**Note:** if structured workflow is not activated, ‘Immunization’ screen displays with Immunization Rx status.

34. Complete all remaining workflow steps as required.

35. Click Approve. ‘Workflow’ screen closes and Patient card’s ‘Immunization’ screen appears. The Non-influenza has the following status: **Status = Signed Consent, Product Status = Claimed** and **Fee Status = Claimed**.

<table>
<thead>
<tr>
<th>Immunizations</th>
</tr>
</thead>
<tbody>
<tr>
<td>N - New Immunization</td>
</tr>
<tr>
<td>D - Pharmacist Declined</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Items ($)</th>
<th>Status</th>
<th>Product Status</th>
<th>Fee Status</th>
<th>Created</th>
<th>Completed</th>
</tr>
</thead>
<tbody>
<tr>
<td>117</td>
<td>Non-Influenza</td>
<td>Signed Consent</td>
<td>Claimed</td>
<td>Claimed</td>
<td>26/07/2017</td>
</tr>
</tbody>
</table>

**Note:** If Free for service was selected in the Fee field on the Administration tab. The ‘Immunizations’ screen displays the same as above, except **Fee status = No Fee Applicable.**
Scenario 2: Using a Recently Dispensed Non-influenza Rx for the Patient

‘Use an existing Rx recently dispensed’ option displays in the Rx Options drop down menu if a vaccine Rx was dispensed within the number of days set by the pharmacy.

1. Call up a patient card using the F3 - Patient search.
2. On right navigation pane, under the View section, click Immunizations.

‘Immunizations’ window appears.
3. Click N - New Immunization or click Ins.

4. On the Type drop down list, select Non-Influenza and then click Perform Now. Immunization wizard begins.

**Note:** If you want to add the immunization record to the Immunizations queue in order to complete the immunization form later, click Save for Later. ‘Immunization’ screen appears.

The status of the Non-influenza immunization is as follows.

User is brought back to ‘Immunization’ screen; The Non-influenza Immunization has the following status.

See the Completing Immunizations ‘Saved for Later’ section for more information.
Rx

The Rx section consists of whether the product was dispensed now or earlier, and whether it was dispense from the current pharmacy or externally, the name of the product, the pack size and UPC of the product. To fill in the Rx information:

5. On the Rx tab, click the Rx Options drop down textbox, and select **Use an existing Rx recently dispensed**.

The ‘Please select an Rx from the profile’ field and the ‘View Profile’ button displays below.

6. Click View Profile. ‘Profile - Recently Dispensed’ window displays with a list of Vaccine Rx.
7. Select an Rx, and click OK. The Field box next to the ‘View Profile’ button is populated with the Original Rx Number, Drug name, Fill Date with Time and # of days ago the Rx was filled. Product field, PackSize field and UPC field are all automatically populated. The ‘Next’ button is enabled.

**Note:** Optional - You can press F5 on the keyboard to view the Drug card and the details of the product, and then click Close.

8. Click Next. ‘Emergency contact’ tab appears.
Emergency Contact

The emergency contact will be contacted in the event of an emergency.

9. Search for and select an emergency contact.

10. Specify the contact’s Relationship to the patient and enter their phone number(s).

**Note:** If the patient has an emergency contact saved to the F3 - Patient card (Other tab), the contact’s information prepopulates in the Emergency Contact fields and the ‘Patient Consent’ tab appears.

If the patient has more than one emergency contact saved to the F3 - Patient card, select the desired contact from the list.

11. Click **Save to Patient**, to save the emergency contact to the F3 - Patient card. The emergency contact is inserted in the Other tab in the F3 - Patient card.

12. Click **Next**.

**Note:** A daytime phone number for the emergency contact is required to proceed.

13. Click **Next**. ‘Patient Consent’ tab appears.

Patient Consent

The Patient Consent consists of questions that will determine whether the patient is eligible to get the injection. To fill in the Patient consent section:

14. Select the appropriate answer for each of the Patient Consent questions.

- Some answers will not allow the patient to receive the immunization.

  For example, if the patient answers **Yes** to ‘Are you sick today?’, he or she will be ineligible for immunization.

- Some answers may present a note to the pharmacist.

  For example, if the patient answers **Yes** to ‘Are you allergic to latex gloves?’, a note displays instructing the pharmacist not to use latex products.
**Note:** For question **Pharmacist - Will you be administering a Live Vaccine?**

a. If user clicks **Yes**, 4 additional questions display below for the patient to answer.

b. If user clicks **No**, no additional questions display below.
If the system determines the patient is ineligible for immunization, all consent questions will become read-only. Click Refuse Immunization and complete the Enter a Comment window. See the Declined or Refused Immunizations section for more information.

15. Once the patient has answered each of the Patient Consent questions and the pharmacist has determined the patient is eligible for immunization, click Print Consent. The ‘Immunization Report’ window appears.

**Note:** All questions must be answered in order to proceed.
16. Click **Print Consent**. The ‘Immunization Report’ window appears. The **Non-Influenza Consent Form** prints. This form shows each of the Patient Consent questions and their answers for the patient to review.

If **No** is answered to the question **Pharmacist-Will you be administering a Live Vaccine?**, then the following Consent form is printed.

![Non-Influenza Vaccine Consent Form](image-url)
If Yes is answered to the question Pharmacist-Will you be administering a Live Vaccine?, then the following Consent form is printed.

**Non-Influenza Vaccine Consent Form**

**PATIENT INFORMATION**

- First Name: [Redacted]
- Last Name: [Redacted]
- Date of Birth: 02-Feb-1999
- Address: 220 Finch AVE. E., Toronto ON M3J 2J9
- Emergency Contact: De Gary
- Relationship to Patient: Spouse
- Contact's Phone Number: (416) 222-2222
- Contact's Other Phone Number: [Redacted]

**SCREENING QUESTIONNAIRE**

- Screening Question: [Redacted]
- Screening Question: [Redacted]
- Screening Question: [Redacted]
- Screening Question: [Redacted]
- Screening Question: [Redacted]
- Screening Question: [Redacted]
- Screening Question: [Redacted]
- Screening Question: [Redacted]
- Screening Question: [Redacted]
- Screening Question: [Redacted]
- Screening Question: [Redacted]
- Screening Question: [Redacted]

**CONSENT GIVEN BY PATIENT**

- I, the undersigned client, patient or guardian, have read or had explained to me information about the vaccine as outlined in the vaccine information sheet provided to me. I have had the chance to ask questions, and answers were given to my satisfaction. I understand the risks and benefits of receiving the vaccine. I agree to use the pharmacy for 15 minutes after the vaccination by the pharmacist, after getting the vaccine.

- In the event of a reaction, I will receive a copy of this form containing information on emergency treatments that I should provide, or a copy will be provided to my agent or EMS parameters.

- I confirm that I want to receive [Redacted]

- I confirm that the above-named patient is capable of prescribing consent for [Redacted] and that the [Redacted] should be given to patient.

<table>
<thead>
<tr>
<th>Patient Test: Patient</th>
<th>Patient Signature</th>
<th>Date Signed: 26-Aug-2017</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Pharmacist Test: Pharmacist</th>
<th>Pharmacist Signature</th>
<th>Date Signed: 26-Aug-2017</th>
</tr>
</thead>
</table>
17. After printing the report, the ‘Scan Consent’ tab appears. The following 3 options become available if you have a document scanner:

- **Scan Patient Consent Form**: Allows you to scan the patient consent form into the system.

- **Select from Network Scan**: If you have already scanned the signed consent form and the file is saved to the network, select this option to import the form.

- **Proceed without Scan**: Allows you to continue processing the immunization without importing the signed consent form. All consent forms can then be scanned at the end of the day using the Document Scan Utility.

The following 3 options become available if do not have a document scanner:

- **Select from File**: If you have already scanned the signed consent form and the file is saved to a local directory, select this option to import the form.

- **Select from Network Scan**: If you have already scanned the signed consent form and the file is saved to the network, select this option to import the form.

- **Proceed without Scan**: Allows you to continue processing the immunization without importing the signed consent form. All consent forms can then be scanned at the end of the day using the Document Scan Utility.

18. Click **Proceed without Scan**. Prompt ‘Are you sure you want to proceed without scanning the signed consent form? You will need to retain the signed paper copy for your records.’ with options Yes and No.

19. Click **Yes**. The ‘Product’ tab appears.
Product

The product tab requires details of the product that will be administered, such as dispense quantity, Lot Number, and Expiry date, this section is used to submit and claim the Rx. To fill in the product section:

20. If the ‘Require UPC verification’ configuration setting is enabled, scan or enter the UPC from the drug pack. If a UPC match is found, product information will populate. The ‘Next’ button is enabled.

**Note**: You may need to manually enter the lot number and expiry date if this information is not stored in the product barcode.
If the ‘Require UPC verification’ configuration setting is disabled, select a product from the list. Enter the ‘Disp Qty’, ‘Lot Number’, and ‘Expiry Date’ fields associated with the drug. The ‘Next’ button is enabled.

21. Click Next. The ‘Administration’ tab appears.

**Administration**

The administration section will consist of information in regards to date of administration, site of administration on the body, and whether a service fee is charged. To fill in the Administration section:

22. Enter the site of administration in the **Site of Admin** field (e.g., left arm, right thigh)

23. Select the pharmacist who administered the shot from the **Administered by** list.

**Note:** If the **Administered by** user is not the currently logged in user, the **Administered by** user will be required to enter their login credentials in order to proceed.
24. On the **Administration Fee** drop down textbox, select whether or not to charge for the service provided. The ‘**Finalize Immunization**’ button is enabled.

25. Enter any comments in the space provided (optional).

26. Click **Finalize Immunization**.

27. If you have electronic signatures enabled, the pharmacist will be prompted to sign the signature pad in order to proceed. Sign the signature pad and click **OK**.
28. Prompt displays ‘Print Immunization Record’ with options Yes and No.

29. Click Yes. Record is printed. User is brought to ‘F12’ screen to bill the fee for service for non-influenza immunization.

   **Note:** If No is clicked instead, record is not printed.

**Billing Service Fee**

Once Immunization is finalized and an Immunization record is printed, and Non-influenza Immunization service fee was selected in the Fee field on the Administration tab, the Immunization can be billed. To bill an Immunization:

30. Input mandatory fields.

31. Click F12 – Fill Rx or press F12 on your keyboard. Fee is billed successfully and label is printed.

32. If structured workflow is activated the Rx will follow the workflow configuration that is dictated.

   **Note:** if structured workflow is not activated, ‘Immunization’ screen displays with Immunization Rx status.

33. Complete all remaining workflow steps as required.

34. Click Approve. ‘Workflow’ screen closes and the Patient card’s ‘Immunization’ screen appears. The Non-influenza has the following status: **Status = Completed, Product Status = Claimed** and **Fee Status = Claimed**.

   **Note:** If Free for service was selected in the Fee field on the Administration tab. The ‘Immunizations’ screen displays the same as above, except **Fee status = No Fee Applicable**.
Scenario 3: Refilling an Existing Immunization Rx

‘Refill an existing immunization Rx’ displays in the Rx Options drop down menu if there is a refillable vaccine Rx.

1. Call up a patient card using the F3 - Patient search.
2. On right navigation pane, under the View section, click Immunizations.

‘Immunizations’ window appears.

3. Click N - New Immunization or click Ins.
4. On the **Type** drop down list, select **Non-Influenza** and then click **Perform Now**. Immunization wizard begins.

Note: If you want to add the immunization record to the Immunizations queue in order to complete the immunization form later, click **Save for Later**. ‘**Immunization**’ screen appears. The status of the Non-influenza immunization is as follows. User is brought back to ‘**Immunization**’ screen; The Non-influenza Immunization has the following status.

See the [Completing Immunizations ‘Saved for Later’](#) section for more information.

**Rx**

The Rx section consists of whether the product was dispensed now or earlier, and whether it was dispense from the current pharmacy or externally, the name of the product, the pack size and UPC of the product. To fill in the Rx information:

5. On the **Rx** tab, click the **Rx Options** drop down textbox, and select **Refilling an existing immunization Rx**.
The ‘Please select an Rx from the profile’ field and the ‘View Profile’ button displays below.

6. Click View Profile. ‘Profile – Refillable’ window displays with a list of Vaccine Rx.

7. Select an Rx, and click OK. The Field box next to the ‘View Profile’ button is populated with the Original Rx Number, Drug name, Fill Date with Time and how many days ago the Rx was filled. Product field, PackSize field and UPC field are all automatically populated. The ‘Next’ button is enabled.

Note: Optional - You can press F5 on the keyboard to view the Drug card and the details of the product, and then click Close.

8. Click Next. ‘Emergency contact’ tab appears.
Emergency Contact

The emergency contact will be contacted in the event of an emergency.

9. Search for and select an emergency contact.

10. Specify the contact’s **Relationship** to the patient and enter their phone number(s).

**Note:** If the patient has an emergency contact saved to the F3 - Patient card (Other tab), the contact’s information prepopulates in the Emergency Contact fields and the ‘**Patient Consent**’ tab appears.

If the patient has more than one emergency contact saved to the F3 - Patient card, select the desired contact from the list.

11. Click **Save to Patient**, to save the emergency contact to the F3 - Patient card. The emergency contact is inserted in the Other tab in the F3 - Patient card.

![Emergency Contact Card]

12. Click **Next**.

**Note:** A daytime phone number for the emergency contact is required to proceed.

13. Click **Next**. ‘**Patient Consent**’ tab appears.

**Patient Consent**

The Patient Consent consists of questions that will determine whether the patient is eligible to get the injection. To fill in the Patient consent section:

14. Select the appropriate answer for each of the Patient Consent questions.

- Some answers will not allow the patient to receive the immunization.
  
  For example, if the patient answers Yes to ‘**Are you sick today?**’, he or she will be ineligible for immunization.

- Some answers may present a note to the pharmacist.
  
  For example if the patient answers Yes to ‘**Are you allergic to latex gloves?**’, a note displays instructing the pharmacist to not use latex products.
Note: For question Pharmacist - Will you be administering a Live Vaccine?

a. If user clicks Yes, 4 additional questions display below for the patient to answer.

b. If user clicks No, no additional questions display below.
If the system determines the patient is ineligible for immunization, all consent questions will become read-only. Click Refuse Immunization and complete the Enter a Comment window. See the Declined or Refused Immunizations section for more information.

![Comment window](image)

15. Once the patient has answered each of the Patient Consent questions and the pharmacist has determined the patient is eligible for immunization, click Print Consent. The ‘Immunization Report’ window appears.

**Note:** All questions must be answered in order to proceed.
16. Click **Print Consent**. The ‘Immunization Report’ form appears. The **Non-Influenza Consent Form** prints. This form shows each of the Patient Consent questions and their answers for the patient to review.

If **No** is answered to the question **Pharmacist-Will you be administering a Live Vaccine?**, then the following Consent form is printed.
If Yes is answered to the question Pharmacist-Will you be administering a Live Vaccine?, then the following Consent form is printed.
17. After printing the report, the ‘Scan Consent’ tab appears. The following 3 options become available if you have a document scanner:

- **Scan Patient Consent Form**: Allows you to scan the patient consent form into the system.
- **Select from Network Scan**: If you have already scanned the signed consent form and the file is saved to the network, select this option to import the form.
- **Proceed without Scan**: Allows you to continue processing the immunization without importing the signed consent form. All consent forms can then be scanned at the end of the day using the [Document Scan Utility](#).

The following 3 options become available if do not have a document scanner:

- **Select from File**: If you have already scanned the signed consent form and the file is saved to a local directory, select this option to import the form.
- **Select from Network Scan**: If you have already scanned the signed consent form and the file is saved to the network, select this option to import the form.
- **Proceed without Scan**: Allows you to continue processing the immunization without importing the signed consent form. All consent forms can then be scanned at the end of the day using the [Document Scan Utility](#).

18. Click **Proceed without Scan**. Prompt ‘Are you sure you want to proceed without scanning the signed consent form? You will need to retain the signed paper copy for your records.’ with options **Yes** and **No**.

19. Click **Yes**. The ‘Product’ tab appears.
Product

The product tab requires details of the product that will be administered, such as dispense quantity, Lot Number, and Expiry date, this section is used to submit and claim the Rx. To Fill in the product section:

20. If the ‘Require UPC verification’ configuration setting is enabled, scan or enter the UPC from the drug pack. If a UPC match is found, product information will populate. The ‘Refill Rx’ button is enabled.

Note: You may need to manually enter the lot number and expiry date if this information is not stored in the product barcode.
21. If the ‘Require UPC verification’ configuration setting is disabled, select a product from the list. Enter the ‘Disp Qty’, ‘Lot Number’, and ‘Expiry Date’ fields associated with the drug. The ‘Refill Rx’ button is enabled.

![Refill Rx screen](image)

**Refill Rx**

22. Click **Refill Rx**. ‘**F12 –Fill Rx**’ screen appears. All fields are prepopulated with a value except the ‘Initials’ field.

23. Input initials, and then click **F12**. ‘**Non-Influenza wizard**’ window displays with the ‘**Administration**’ tab opened.
Administration

The administration section will consist of information in regards to date of administration, site of administration on the body, and whether a service fee is charged. To fill in the Administration section:

24. Enter the site of administration in the Site of Admin field (e.g., left arm, right thigh)

25. Select the pharmacist who administered the shot from the Administered by list.

**Note:** If the Administered by user is not the currently logged in user, the Administered by user will be required to enter their login credentials in order to proceed.

26. On the Administration Fee drop down textbox, select whether or not to charge for the service provided. The ‘Finalize Immunization’ button is enabled.

27. Enter any comments in the space provided (optional).

28. Click Finalize Immunization.
29. If you have electronic signatures enabled, the pharmacist will be prompted to sign the signature pad in order to proceed. Sign the signature pad and click **OK**.

30. Prompt ‘**Print Immunization Record**’ with options **Yes** and **No**.

31. Click **Yes**. Record is printed. ‘**F12**’ screen displays to bill the fee for service for non-influenza immunization.

**Note:** If **No** is clicked instead, record is not printed.
Billing Service Fee

Once Immunization is finalized and an Immunization record is printed, and Non-influenza Immunization service fee was selected in the Fee field on the Administration tab, the Immunization can be billed. To bill an Immunization:

32. Input mandatory fields.

33. Click F12 – Fill Rx or press F12 on your keyboard. Fee is billed successfully and label is printed.

34. If structured workflow is activated the Rx will follow the workflow configuration that is dictated.

Note: if structured workflow is not activated, ‘Immunization’ screen displays with Immunization Rx status.

35. Complete all remaining workflow steps as required.

36. Click Approve. ‘Workflow’ screen closes and Patient card’s ‘Immunization’ screen appears. The Non-influenza has the following status: Status = Completed, Product Status = Claimed and Fee Status = Claimed.

Note: If Free for service was selected in the Fee field on the Administration tab. The ‘Immunizations’ screen displays the same as above, except Fee status = No Fee Applicable.
Scenario 4: Using a Product Obtained Externally

‘Use a product obtained externally’ displays in the Rx Options drop down menu if the vaccine Rx is obtained externally.

Rx obtained externally is defined in the following two situations:

- When a patient brings in an immunization Rx that was dispensed from another pharmacy.
- When a non-influenza immunization has more than one injection that needs to be taken by the patient. For example first injection on day 0, second injection on day 30, and third injection on day 60. If the second and third Immunization Rx were purchased and dispensed to the patient along with the first immunization. Then when the patient comes in with the second or third immunization they are treated as products obtained externally.

1. Call up a patient card using the F3 - Patient search.

2. On right navigation pane, under the View section, click Immunizations.

‘Immunizations’ window appears.
3. Click **N - New Immunization** or click **Ins**.

4. On the **Type** drop down list, select **Non-Influenza** and then click **Perform Now**. Immunization wizard begins.

**Note:** If you want to add the immunization record to the Immunizations queue in order to complete the immunization form later, click **Save for Later**. ‘Immunization’ screen appears.

The status of the Non-influenza immunization is as follows.

You are brought back to ‘Immunization’ screen; The Non-influenza Immunization has the following status.

See the [Completing Immunizations ‘Saved for Later’](#) section for more information.
Rx

The Rx section consists of whether the product was dispensed now or earlier, and whether it was dispense from the current pharmacy or externally, the name of the product, the pack size and UPC of the product. To fill in the Rx information:

5. On the **Rx** tab, click the **Rx Options** drop down textbox, and select **Use a product obtained externally**.

Product, Packsize, and UPC fields displays with blank fields.

6. Select a product in the **Product** drop down textbox. The PackSize and UPC fields are automatically populated. The **Next** button is enabled.

**Note:** The Option to press F5 on the keyboard to view the Drug card and the details of the product, is also available, once viewed click **Close**, to return to the Rx tab.

7. Click **Next**. ‘Emergency contact’ tab appears.
Emergency Contact

The emergency contact is the person who will be contacted in the event of an emergency.

8. Search and select the emergency contact.

9. Specify the contact’s **Relationship** to the patient and enter their phone number(s).

**Note:** If the patient has an emergency contact saved to the F3 - Patient card (Other tab), the contact’s information prepopulates in the Emergency Contact fields and the ‘**Patient Consent**’ tab appears. If the patient has more than one emergency contact saved to the F3 - Patient card, select the desired contact from the list.

10. Click **Save to Patient**, to save the emergency contact to the F3 - Patient card. The emergency contact is inserted in the ‘**Other**’ tab in the F3 - Patient card.

![Emergency Contact Table]

11. Click **Next**.

**Note:** A daytime phone number for the emergency contact is required to proceed.

12. Click **Next**. ‘**Patient Consent**’ tab appears.

Patient Consent

The Patient Consent consists of questions that will determine whether the patient is eligible to get the injection. To fill in the Patient consent section:

13. Select the appropriate answer for each of the Patient Consent questions.

- Some answers will not allow the patient to receive the immunization.
  
  For example, if the patient answers **Yes** to ‘**Are you sick today?**’, he or she will be ineligible for immunization.

- Some answers may present a note to the pharmacist.
  
  For example if the patient answers **Yes** to ‘**Are you allergic to latex gloves?**’, a note displays instructing the pharmacist to not use latex products.
Note: For question Pharmacist - Will you be administering a Live Vaccine?

a. If user clicks Yes, 4 additional questions display below for the patient to answer.

b. If user clicks No, no additional questions display below.
If the system determines the patient is ineligible for immunization, all consent questions will become read-only. Click **Refuse Immunization** and complete the **Enter a Comment** form. See the [Declined or Refused Immunizations](#) section for more information.

![Image]

14. Once the patient has answered each of the Patient Consent questions and the pharmacist has determined the patient is eligible for immunization, click **Print Consent**. The ‘Immunization Report’ window appears.

**Note:** All questions must be answered in order to proceed.
15. Click **Print Consent**. The ‘Immunization Report’ window appears. The **Non-Influenza Consent Form** prints. This form shows each of the Patient Consent questions and their answers for the patient to review.

If **No** is answered to the question **Pharmacist-Will you be administering a Live Vaccine?**, then the following Consent form is printed.

![Non-Influenza Vaccine Consent Form](image)

---

Page 1 of 1
If Yes is answered to the question **Pharmacist-Will you be administering a Live Vaccine?**, then the following Consent form is printed.

[Image of the Non-Influenza Vaccine Consent Form]

- **Patient Information**
  - Patient Name
  - Last Name
  - Address: 298 Finch Ave, East, Toronto ON M3J 3J9
  - Health Care Number: 900-333-3333
  - Phone Number: (416) 555-5555

- **Screening Questionnaire**
  - Are you sick today? (e.g., fever greater than 100.5°F, breathing problems, or active infection)
  - Are you allergic to any vaccinations including vaccines?
  - Do you have any allergies to penicillin, metamizol, thiamisal, methyl salicylate or glucosamine?
  - Have you ever had a severe, life-threatening reaction to a previous vaccination?
  - Have you had wheezing, shortness of breath or difficulty breathing within 24 hours of getting a vaccine?
  - Are you allergic to latex gloves?
  - Have you had Guillain-Barré Syndrome 6 weeks of getting a vaccine?
  - Do you have a new or changing neurological disorder?
  - Do you have a new or changing neurological disorder?
  - Do you have a medical condition that can weaken your immune system? (e.g., Leukemia, Lymphoma, HIV/AIDS)
  - Are you taking any medications that can weaken your immune system in the past 3 months? (e.g., Prednisone use)
  - Have you received any vaccines in the last 4 weeks?
  - Are you or do you think you might be pregnant?

- **Consent Given by Patient**
  - I, the undersigned client, parent or guardian, have read or had explained to me, information about the vaccine as outlined in the vaccine information sheet provided to me. I have had the opportunity to ask questions and have been given to my satisfaction, information about the risks and benefits of receiving the vaccine. I agree to wait in the pharmacy for 15 minutes after receiving the vaccine.
  - I am aware that it is possible (rare) to have an extreme allergic reaction to any component of the vaccine. Some serious reactions called anaphylaxis can be life-threatening and are a medical emergency. If experienced within 15 minutes following vaccination, I am asked to go to hospital for emergency treatment. If a reaction occurs, I will receive a copy of this form containing information on emergency treatments that I had received, or a copy will be provided to my agent in EMI's database.
  - I confirm that I want to receive the vaccine.
  - Patient Name: Gary Deary
  - Patient Signature: [Signature]
  - Date Signed: 28-Aug-2017

- **Pharmacist Declaration**
  - The above-named patient is capable of providing consent for the vaccine and the vaccine should be given to patient.
  - Pharmacist: Gary Deary (3687455)
  - Pharmacist Signature: [Signature]
  - Date Signed: 28-Aug-2017
16. After printing the report, the ‘Scan Consent’ tab appears. The following 3 options become available if you have a document scanner:

- **Scan Patient Consent Form**: Allows you to scan the patient consent form into the system.

- **Select from Network Scan**: If you have already scanned the signed consent form and the file is saved to the network, select this option to import the form.

- **Proceed without Scan**: Allows you to continue processing the immunization without importing the signed consent form. All consent forms can then be scanned at the end of the day using the [Document Scan Utility](#).

The following 3 options become available if do not have a document scanner:

- **Select from File**: If you have already scanned the signed consent form and the file is saved to a local directory, select this option to import the form.

- **Select from Network Scan**: If you have already scanned the signed consent form and the file is saved to the network, select this option to import the form.

- **Proceed without Scan**: Allows you to continue processing the immunization without importing the signed consent form. All consent forms can then be scanned at the end of the day using the [Document Scan Utility](#).

17. Click **Proceed without Scan**. Prompt ‘Are you sure you want to proceed without scanning the signed consent form? You will need to retain the signed paper copy for your records.’ with options Yes and No.

18. Click **Yes**. The ‘Product’ tab appears.
Product

The product tab requires details of the product that will be administered, such as dispense quantity, Lot Number, and Expiry date, this section is used to submit and claim the Rx. To fill in the product section:

19. If the ‘Require UPC verification’ configuration setting is enabled, scan or enter the UPC from the drug pack. If a UPC match is found, product information will populate. The ‘Bill Product’ button is enabled.

Note: You may need to manually enter the lot number and expiry date if this information is not stored in the product barcode.
20. If the ‘Require UPC verification’ configuration setting is disabled, select a product from the list. Enter the ‘Disp Qty’, ‘Lot Number’, and ‘Expiry Date’ fields associated with the drug. The ‘Bill Product’ button is enabled.
Not billing product

The product is not billed since the patient is bringing in the product.


22. Fill in all mandatory fields.

23. On the right navigation pane, in the ‘Rx’ section, click Make Rx Not Dispensed.

24. Click F12 – Fill Rx or press F12 on your keyboard. The Rx is submitted successfully. You are brought back to the Non-influenza wizard, and the ‘Administration’ tab appears.
Administration

The administration section will consist of information in regards to date of administration, site of administration on the body, and whether a service fee is charged. To fill in the Administration section:

25. Enter the site of administration in the **Site of Admin** field (e.g., left arm, right thigh)

26. Select the pharmacist who administered the shot from the **Administered by** list.

**Note:** If the **Administered by** user is not the currently logged in user, the **Administered by** user will be required to enter their login credentials in order to proceed.

27. On the **Administration Fee** drop down textbox, select whether or not to charge for the service provided. The **‘Finalize Immunization’** button is enabled.

28. Enter any comments in the space provided (optional).

29. Click **Finalize Immunization**.
30. If you have electronic signatures enabled, the pharmacist will be prompted to sign the signature pad in order to proceed. Sign the signature pad and click OK.

Prompt ‘Do you want to Print Immunization for the patient?’ appears.

31. Click Yes. Record is printed. ‘F12’ screen appears.

Note: If No is clicked instead, record is not printed.
Billing Service Fee

Once Immunization is finalized and an Immunization record is printed, and Non-influenza Immunization service fee was selected in the Fee field on the Administration tab, the Immunization can be billed. To bill an Immunization:

32. Input mandatory fields.

33. Click F12 – Fill Rx or press F12 on your keyboard. Fee is billed successfully and label is printed.

34. If structured workflow is activated the Rx will follow the workflow configuration that is dictated.

**Note:** if structured workflow is not activated, ‘Immunization’ screen displays with Immunization Rx status.

35. Complete all remaining workflow steps as required.

36. Click Approve. ‘Workflow’ screen closes and Patient card’s ‘Immunization’ screen appears. The Non-influenza has the following status: Status = Completed, Product Status = External and Fee Status = Claimed.

**Note:** if Free for service was selected in the Fee field on the Administration tab. The ‘Immunizations’ screen displays the same as above, except Fee status = No Fee Applicable.
Completing Immunizations ‘Saved for Later’
Immunization records that have been ‘saved for later’ can be accessed either via the F3 - Patient card or the F9 - Workflow card.

1. Call up the patient using the F3 - Patient search or select F9 - Workflow.
2. On right navigation pane, under the View section, click Immunizations.
3. Select the immunization record you want to complete and click F - Call up.

**Note:** For Scenario 1, 2, and 3 complete steps starting from ‘Rx’ to the end of ‘Billing an Immunization’ of the Electronic Mode section.

For Scenario 4 complete steps starting from ‘Rx’ to the end of ‘Administration’ of the Electronic Mode section.
Recording Emergency Epinephrine Shots

An emergency Epinephrine shot may need to be administered if the patient has a reaction to the immunization. This section explains how to add Emergency Epinephrine shot records to an immunization record.

**Note:** Emergency Epinephrine shots can only be added to immunization records that have a status of **Completed**.

1. Call up a patient using the **F3 - Patient** search.
2. On right navigation pane, under the **View** section, click **Immunizations**.
3. Right-click a completed immunization record and select **Add Epinephrine shot**.

Product

4. If the ‘Require UPC verification’ configuration setting is enabled, scan or enter the UPC from the drug pack. If a UPC match is found, product information will populate. You may need to manually enter the lot number and expiry date if this information is not stored in the product barcode.
If the ‘Require UPC verification’ configuration setting is disabled, select a product from the list. Enter the Lot Number and Expiry Date associated with the drug.

5. Click Next. The ‘Administration’ tab appears.
Administration

6. Enter the site of administration in the **Site of Admin** field (e.g., left arm, right thigh).

7. Select the pharmacist who administered the shot from the **Administered by** list.

8. Enter any comments in the space provided (optional).

9. Click **Finalize Immunization**. ‘**F12**’ screen appears.
Billing Product

10. Input mandatory fields.

**Note:** If the user who performed the immunization has an F7 - Doctor record with a ‘Pharmacist’ designation, that user’s information will populate in the doctor section of the F12 screen.

If the user does not have an F7 - Doctor record or if the immunization was performed by a different user, the F7 - Doctor search form will appear. Perform a doctor search to locate the pharmacist to use as the prescriber.

11. A claim for the treatment will populate in the F12 screen. Enter a Disp Qty of ‘1’ to represent the number of administered treatments.

12. Click F12 - Fill Rx or press F12 on your keyboard. The claim will be transmitted to the appropriate party for payment and label is printed.

13. Complete all remaining workflow steps as required.

14. A record of the emergency Epinephrine show will be added to the Immunizations list with a Status of ‘Completed’ and a Product Status of ‘Claimed’.

**Note:** Repeat these steps for each Emergency Epinephrine shot that is administered to the patient.
Reprinting an Immunization Record

This section explains the process for reprinting immunization records. Immunizations can be reprinted either via the F3 - Patient card or the F9 - Workflow card.

On the F3-Patient card and F9 – Workflow card, the immunization record can be reprinted:

- If the Status is either Printed Consent or Signed Consent, the Product status and Fee status does not affect being able to reprint the immunization record.

**Note**: for F9 – Workflow card if both Product status and Fee status are both ‘Complete’, the immunization record does not appear.

1. Call up the patient using the F3 Patient search, or select F9 - Workflow.
2. On right navigation pane, under the View section, click Immunizations.
3. Select the appropriate immunization record and click P - Print/Reprint. The ‘Immunization Report’ window appears.
4. Select the number of Epinephrine Emergency Treatments that need to be printed in the report.
5. Click Print. The selected record generates.
Viewing Immunization Record Details

This section explains the process for viewing immunization records. Immunizations can be viewed via the F3 - Patient card.

On the F3-Patient card, the immunization record can be reprinted:

- If the Status is either Printed Consent or Signed Consent, the Product status and Fee status does not affect being able to view the immunization record.

1. Call up the patient using the F3 Patient search.
2. On right navigation pane, under the View section, click Immunizations.
3. Call up the record by doing one of the following:
   - Right-click the record you want to view and select View Details;
   - Select the record and press F2;
   - Double-click the record.

The ‘Immunization View’ screen appears
4. If the immunization record has not yet been scanned into the system, only the immunization details that were recorded on-screen will be visible. Click **Print** to reprint the immunization record or full report, or **View Signature** to view the digital signature, if one was captured.

![Immunization View](image)

5. If the immunization record has been scanned into the system, the immunization details display in the **Immunization** tab. Click **Print** to reprint the immunization record or full report, or **View Signature** to view the digital signature, if one was captured.

![Immunization View](image)
In the Documents tab, the scanned record appears. From here you can adjust the brightness, contrast, and saturation of the record, or reprint the consent record.

Note: If you reprint the immunization document(s) from the Documents tab in the Immunization View screen, the scanned image of the original document(s) (not the original documents themselves) will print. As such, the resolution may not be optimal. See the Reprinting an Immunization Record section for instructions on how to reprint the original document(s).

6. Click Close. ‘Immunization View’ screen closes.
Cancelling a Claim

This section explains how to cancel an Immunization claim. Immunization claims can be cancelled either via the F3 - Patient card or the F9 - Workflow card.

1. Call up the patient using the F3 Patient search, or select F9 - Workflow.

2. On right navigation pane, click Immunizations.

3. Select the appropriate immunization record and click C - Cancel Claim.

   ![Immunizations Table]

   A prompt displays ‘Are you sure you want to cancel the Rx?’. (For fee)

   ![Confirm Rx]

   4. Click Yes.

   5. Enter initials and click OK. A prompt displays ‘You are cancelling the first fill of an Rx. Do you want to’.

   ![Select an Option]

   Filled in Error - Remove from profile
6. Click **Filled in Error – Remove from profile**. Prompt ‘Do you want to copy this “mistake” Rx to a new number?’ appears.

![Filled in Error - Remove from profile]

7. Click **No**.


Prompt displays ‘**Are you are sure you want to cancel the Rx?**’ (For product)

![Confirm Rx]

9. Click **Yes**. Are you sure? Prompt appears with message ‘Is this Rx being cancelled because this patient didn’t pick it up / it couldn’t be delivered?’

10. Click **No**.

11. Put in initials, and click **OK**. A prompt displays ‘You are cancelling the first fill of an Rx. Do you want to:’.

![Select an Option]

- Make this Rx Unfilled
- Filled in Error - Remove from profile
12. Click **Filled in Error - Remove from profile.** Prompt ‘Do you want to copy this “mistake” Rx to a new number?’ appears.

13. Click **No.** The record is removed from the Immunizations section of the patient card. Prompt ‘Are you sure you want to Cancel this Rx?’ appears.

14. Click **Yes.** Rx is cancelled.

**Note:** If **No** is clicked, there are no changes.
Declined or Refused Immunizations

This section explains the process for recording immunizations that have been declined by the pharmacist or refused by the patient.

**Note:** Immunizations that have been declined by the pharmacist or refused by the patient can be noted from the **F3 - Patient** card or the **F9 - Workflow** card.

### Pharmacist Declined

1. Call up the patient using the **F3 Patient** search, or select **F9 - Workflow**.
2. On right navigation pane, click **Immunizations**.
3. Select the appropriate immunization record and click **D - Pharmacist Declined**.
4. Enter the reason for the decline in the space provided and click **Pharmacist Declined**.
5. In the **Immunizations** list, the record shows a **Status** of ‘Declined by Pharmacist’.
Note: In electronic mode, the immunization can also be declined by selecting **Refuse Immunization** from the **Immunization** screen.

Select a refusal reason and enter any comments in the space provided. Click **OK**.
Patient Refused

The ‘Patient Refused’ option can only be used before the patient has been charged for the immunization has been claimed. Once the Immunization has been charged for, the option to use is ‘Cancel Claim’.

1. Call up the patient using the F3 Patient search, or select F9 - Workflow.

2. From the right navigation pane, select Immunizations.

3. Select the appropriate immunization record and click R - Patient Refused.

4. The Enter a Comment window appears.
   a) If the immunization was refused by the patient, select Patient. Enter a comment in the space provided and click Patient Refused.
b) If the immunization was refused by someone other than the patient, select Someone else. The Select agent, Last name, First name, and Relationship to patient fields open.

5. Click the Select agent list. The patient’s linked family members display in the list.

6. Select a patient or click the magnifying glass icon to search for and select a patient.

7. If the person does not have a patient card, manually enter their name in the Last Name and First Name fields.

The selected patient’s name populates in the Last name and First name fields.
8. Select a **Relationship to patient**. Enter any comments in the space provided and click **Patient Refused**.

9. In the **Immunizations** list, the record displays with a **Status** of ‘Refused by Patient’.
Status Types

This section explains each possible status that may be attributed to an immunization record.

**Status**

**Patient Consent Scan Skipped** - The patient consent has not yet been scanned; no claim has been submitted.

**Pending** - The immunization is partially complete, or has been saved for later; no claim has been submitted.

**Refused by Patient** - The immunization has been refused by the patient; no claim has been submitted.

**Signed Consent** - A signed consent form has been obtained and scanned back into the system.

**Completed** - The immunization is complete and the claim has been submitted.

**Completed Paper** - The immunization or Emergency Epinephrine shot has been completed in Paper Mode.

**Declined by Pharmacist** - The immunization has been declined by the pharmacist; no claim has been submitted.

**Printed Consent** - The consent form has been printed but has not been scanned into the system; no claim has been submitted (Paper Mode only).

**Ready for Administration** - A record of the Emergency Epinephrine shot has been created, but is not yet complete, or has been saved for later; no claim has been submitted.

**Product Status**

**Pending Claim** - The immunization or Emergency Epinephrine shot is complete but the claim has not yet been submitted.

**Claimed** - The immunization or Emergency Epinephrine shot is complete and the claim has been submitted.

**Not Completed Yet** - The immunization or Emergency Epinephrine shot is partially complete, or has been saved for later.

**No Product Applicable** - The immunization or Emergency Epinephrine shot has been declined by the pharmacist or refused by the patient. No product has been administered and no claim has been submitted.

**Fee Status**

**No Fee Applicable** - Indicates there is no charge to the patient for the immunization.
Reporting

Reporting Immunizations Products
Running reports for immunization products can be done by selecting the product(s) you want included in the report via the report form. This section instructs on how to run a report for immunization products.

Selecting Drugs in the Report Form

1. Select the report you want to run from the Reports menu. The ‘Drug Usage Report’ window appears.

2. Locate the Drug field and click Add. The ‘Drug Search’ screen appears.

3. Search for and select a drug.
4. The drug is added to the Drug list in the report form. Repeat steps 2-3 for each product you want included in the report.

5. Click Print. The report generates for the selected drug products only.
Reporting Non-Influenza Service Fee

This section explains how to report number of fee for Service for Non-Influenza Immunization that are either filled or cancelled.


‘Pharmacy Business Analysis Report’ window displays on the Selection tab.
2. On the **Date Range** drop down textbox, select Date Range.

**Note:** if you want to customize your date range you can input a **Starting** and **Ending** date.

3. Click **Options** tab.

4. Ensure **Include inactive Rxs**, and **Breakdown fills and cancels** are both enabled.
5. Click **Preview**.

The ‘**Pharmacy Business Analysis Report**’ appears.

![Pharmacy Business Analysis Report](image)

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