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MedsCheck Reviews - Ontario

MedsCheck Reviews are one-on-one interactions where pharmacists help their patients better understand their medication therapy and ensure that medications are being taken as prescribed. The goal of MedsCheck Reviews is to maximize patient compliance to therapy.

This document is based on Kroll V10 Service Pack 9 and explains how to configure MedsCheck Reviews and how to complete MedsCheck Reviews for both paper-based and electronic records.

Configuration

This section explains the configuration settings that must be in place before attempting to use the MedsCheck functionality.

Configuring Electronic Signatures

**NOTE:** Only complete this section if you are using Electronic Signature pads.

In order to use the electronic signatures feature in Kroll, **Allow Electronic Signatures** must be enabled in the Kroll Configuration Parameters screen (File > Configuration > Kroll > Configuration). This will require a support call and must be completed before proceeding.

In addition, the ‘Allow electronic signatures’ setting must be enabled in the Store Level Configuration Parameters screen (File > Configuration > Store > General).
Configuring Electronic MedsCheck Reviews

1. Go to File > Configuration > Store > Rx > Counseling > Professional Services.

2. In the Professional Services area above, ensure the following options are set appropriately.
   - **Require document scan to complete paper med review**: Allows you to complete paper-based MedsChecks using the document scan functionality;
   - **Enable electronic med reviews**: Allows you to use the electronic version of MedsCheck;
   - **Allow editing counseling time**: Allows you to modify the system-calculated amount of time it took to complete the counseling session;
   - **Require electronic signature to finalize professional service**: Prompts for electronic signatures where necessary (only if you are using Electronic Signature pads).
   - **Patient/Physician Letter**: See the Patient and Physician Letters section for more information.
   - **Default Rx selection range**: Allows you to specify which Rxs are included in MedsCheck reviews; enable ‘Since last review’ to include all Rxs that have been filled since the last review in the MedsCheck selection, or enter a value in the ‘In last [x] months’ field.

3. Click OK.
NOTE: If you turn off the ‘Require electronic signature to finalize professional service’ option and keep the other options enabled you will still be able to complete the reviews on-screen; however, you will need to print the report, in order to capture pen-to-paper signatures and then scan it back into the system before giving it to the patient.

Creating an ODB MedsCheck Consent Record

Patients are required to consent to the MedsCheck before the review can take place. ODB MedsCheck Consent records are valid for one year from the date they are created; after a year has passed, the consent record will expire and a new ODB MedsCheck Consent must be created before an additional MedsCheck review can take place.

If you create a MedsCheck Review record and the patient does not have a valid consent record, an ODB MedsCheck Consent record will be automatically inserted.

1. Bring up the patient card using the F3 - Patient search.
2. Select Consents from the right navigation pane.
3. The Consent profile will appear. Select Ins > ODB MedsCheck Consent.

4. The ODB MedsCheck Consent form will appear. Click Print Patient Consent.
6. In the MedsCheck Patient Acknowledgement of Professional Pharmacy Service form, check the appropriate review type.

7. Have the patient sign and date the bottom section of the form.

8. Once the patient has signed and dated the form, click OK to close the ODB MedsCheck Consent form.

9. Click Alt+X - Start to exit the patient card.

10. Select Utilities > Printed Document Scan/Import.
11. The **Import Scanned Documents** screen will appear. Place the form face down on the scanner hopper. Check **Scan both sides of paper** if you are scanning pages with information on both sides and your scanner supports dual side scanning. Click **Start Scanning**.

![Import Scanned Documents](image1)

12. When scanning is complete, the screen will indicate how many pages were scanned successfully and how many will need to be manually reconciled. When you are finished, click **Process and Reconcile**.

![Import Scanned Documents](image2)
13. The **Document Scan Reconciliation** screen will appear. Items ready to be processed will appear in the **Documents to be created** section. Items that need to be reconciled will appear in the **Unprocessed Images** section.

14. If the form was scanned successfully and appears in the **Documents to be created** section, click the **Process Pending Documents** button. Click **Cancel** to close the screen.

15. In the patient card, the **Consent** type for the ODB MedsCheck Consent will show ‘**Written Consent**’ to indicate the consent form has been signed and scanned. The consent will be valid for one year from the date indicated in the **Consent Date** column.
NOTE: Expired ODB MedsCheck Consent records will appear in grey italics.

### Electronic MedsCheck Reviews

This section explains how to perform an Electronic MedsCheck review. Ensure your system is configured for Electronic MedsCheck Reviews before proceeding. See [Paper MedsCheck Review](#) for information on the non-electronic process.

NOTE: The automatic prompts will not appear if the patient does not meet the criteria for a MedsCheck Review; however, based on other available information and your professional judgement, you can determine whether the patient might benefit from a MedsCheck Review and then manually create a MedsCheck Review.

### Configuring ODB MedsCheck Prompt

The 'Prompt for ODB Med Checks' setting in the **Store Level Configuration Parameters > Rx > 3 - Prompting** screen determines if you are prompted to create a MedsCheck record during prescription filling or if MedsCheck Reviews must be created manually.
When ‘Prompt for ODB Med Checks’ is enabled, the system screens each patient for MedsCheck eligibility each time an Rx is filled. If the patient is eligible, you will be prompted to perform a MedsCheck Review with the patient. Select one of the options below:

- **Add to Med Review Queue**: Selecting this option adds the Med Review record to the MedsCheck Reviews queue which can be accessed from the Patient record or F9 – Workflow. See section ‘Completing MedsCheck ‘Saved for Later’ for further details.

- **Do not prompt me until the next time the patient comes in**: This will suppress prompting for today. The next time the patient comes in to fill an Rx, you will be prompted for the MedsCheck Review.

- **Do not prompt until**: This will allow you to dismiss the prompt for a specified number of days, or until a specified date, after which the prompt will appear.

- **Never prompt for this patient**: This will suppress any further prompts for this patient. This option is only available if the configuration option of Allow ‘Never Prompt’ for MedsCheck Review is enabled.

- **Undecided**: The prompt will re-appear once again the next time a prescription is filled for the patient.
Creating an Electronic MedsCheck Review (Manual)

1. Bring up the patient card using the **F3 - Patient** search.

2. Select **Professional Services** from the right navigation pane.

3. The **Professional Services** profile will appear. Select **N - New > MedsCheck Review**.
4. The **Professional Services** screen will appear. Select a review type from the list and click **Perform Now**. If you want to complete the MedsCheck review later, click **Save for Later** to add it to the F9 - Workflow > Professional Services queue. See the **Save for Later** section for instructions on how to proceed.

5. The **MedsCheck Review Selection** screen will appear. Select the items you want included in the review and click **OK**.

A. **Show Rxs since**: The system will select Rxs to be reviewed based on the configured default Rx selection range. Enter an earlier starting date or select ‘**Show Rxs since Last review**’ and click **Refresh** to override the default setting.
B. **Rxs**: All Rxs in the patient profile that are eligible for MedsCheck Review. These Rxs are included in the review by default and can be manually de-selected.

C. **Show discontinued Rxs**: Allows you to show or hide discontinued (i.e., inactive) Rxs from the MedsCheck Review Selection list.

D. **Allergies**: Any allergy records that are in the patient card. Allergies are included in the review by default and cannot be de-selected.

![MedsCheck Review Selection]

E. **Medical Conditions**: Any medical condition records that are in the patient card. Medical conditions are included in the review by default and cannot be de-selected.

![MedsCheck Review Selection]

F. **Drug line 1**: Allows you to specify how drug line 1 will appear in the review. Options include Brand, Generic, and Default.

G. **Drug line 2**: Allows you to specify how drug line 2 will appear in the review. Options include Brand, Generic, and Default.
The symbols that appear in the MedsCheck Review Selection screen indicate the status and source of each review item. Hover your mouse over the icons to see a description.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>⭐️</td>
<td>Indicates the Rx was created since the last review</td>
</tr>
<tr>
<td>💼</td>
<td>Indicates the Rx was included in the last review</td>
</tr>
<tr>
<td>🚫</td>
<td>Indicates the Rx is inactive</td>
</tr>
<tr>
<td>🏡</td>
<td>Indicates the Rx was filled locally</td>
</tr>
<tr>
<td>🏡</td>
<td>Indicates the Rx was filled locally and it is currently included in a pending review</td>
</tr>
</tbody>
</table>

6. The MedsCheck Annual Review screen will appear. Click **Next** to proceed through the tabs, completing the required fields as you go.

**NOTE:** The type of review that is displayed on screen depends on what type of review was selected in Step 4. In this example, the MedsCheck Annual Review screen appears.

### MedsCheck Review Options

Several MedsCheck review options are available from the right navigation pane on the MedsCheck Annual Review screen.
Service
This section explains each of the Service options available from the right navigation pane.

Print Professional Service

When this option is selected, the MedsCheck report print form will appear. From here, you can print or preview the Pharmacist Worksheet, Personal Medication Record, or Patient Take-Home Survey. You will be prompted to print these reports upon completing the MedsCheck review.
Change Review Parameters

When selected, the MedsCheck Review Rx Selection screen will appear, allowing you to add and remove items that have been included in the review. Click OK to save any changes and Cancel to close the screen.
Select Doctors for Letter

When selected, the **Send Letter to Doctors** form will appear allowing you to send a MedsCheck Review notification to the patient’s physician. See the **Physician Letters** section for more information.

NOTE: The ‘Select Doctors for Letter’ option is only visible when ‘Prompt to print letter’ is enabled in the **Store Level Configuration Parameters > Rx > 7 - Counseling** screen.

View Follow Ups

When selected, the **Professional Services Follow-ups** screen will appear, allowing you to create a reminder to follow-up with the patient or the patient’s prescriber regarding whatever issues that are identified during the review.
Click **Ins** to insert a follow-up record. The **Professional Service Follow-Up** form will appear. Select a **Reason** from the list and enter a follow-up date.
If you select a **Follow Up Prescriber** option from the **Reason** list, Rx fields will appear allowing you to select the specific Rx the follow-up applies to. Once an Rx is selected, its dispensing information (strength, form, etc.) will auto-populate.

Enter any comments in the space provided and click **Save**.
View
This section explains each of the View options available from the right navigation pane.

Patient Charting
When selected, the Patient Charting form will appear displaying the patient charting information that has been recorded in the F3 - Patient card.

Use the F2, Ins, and Del buttons to modify, insert, or delete information on this screen. Click Print to print or Cancel to close the screen.
Patient Documents

When selected, the Patient Document List will appear displaying a list of documents associated with the patient.

Use the F2, Ins, and Del buttons to modify, insert, or delete a patient document. Click Close to exit the screen.
Patient Professional Services

When selected, the Patient MedsCheck Reviews and Dialogs screen will appear, displaying a history of all professional services that have been conducted with the patient, including the current MedsCheck review.

Double-click a professional service to view its details. Click Close to exit the screen.

Profile

The Profile menu on the MedsCheck Annual screen is identical to the Profile menu on the F3 - Patient card. This menu allows you to view All Rxs, Active Rxs, Active Rxs w/Passtimes, Pricing Profile, and the Not Disp/OTC Profile.

Questions Language

Questions in the MedsCheck Annual Review screen automatically use the patient’s default language. If you want the questions to appear in a language other than the patient’s default language (English or French), use the Questions Language controls to switch from English to French or vice versa.
MedsCheck Review Tabs

Questions

The **Questions** tab includes a list of questions that the pharmacist is to ask the patient to better understand their situation. Use the scrollbar to navigate through the list. Make the necessary selections from the dropdown lists and enter notes where required. Click **Next** to proceed.
Medical History

The Medical History tab displays the medications that have been selected on the MedsCheck Review Rx Selection screen.

For each medication listed:

- Note if the patient is currently taking the specified medication and select Yes/No from the Currently Taking list;
- Note if you have identified an adherence issue by selecting Yes/No from the Adherence Issue list;
- Enter the reason for using the medication based on the patient’s feedback in the Indications field;
- Enter any general comments in the Comments field;
- Enter any notes in the Pharmacist Notes field.

Use the Del button to delete a record from the Medical History tab. Click Next to proceed.
Non-Prescription Medications

The Non-Prescription Medications tab provides space to record any over-the-counter, non-prescription medications the patient is taking.

Click Ins to add a non-prescription medication to the tab.

For each non-prescription medication listed:

- Note if the patient is currently taking the specified medication and select Yes/No from the Currently Taking list;
- Note if you have identified an adherence issue by selecting Yes/No from the Adherence Issue list;
- Enter the reason for using the medication based on the patient’s feedback in the Indications field;
- Enter any general comments in the Comments field;
- Enter any notes in the Pharmacist Notes field.

Use the Del button to delete a record from the Non-Prescription Medications tab. Click Next to proceed.
Rxs From Other Pharmacies

The Rxs From Other Pharmacies tab provides space to record medications that the patient is taking that were filled in other pharmacies.

Click Ins to add an Rx from another pharmacy.

For each Rx from another pharmacy listed:

- Note if the patient is currently taking the specified medication and select Yes/No from the Currently Taking list;
- Note if you have identified an adherence issue by selecting Yes/No from the Adherence Issue list;
- Enter the reason for using the medication based on the patient’s feedback in the Indications field;
- Enter any general comments in the Comments field;
- Enter any notes in the Pharmacist Notes field.
**Issues**

The **Issues** tab provides a space to record any therapeutic issues that have been identified during the MedsCheck review.

Click **Ins** to add an identified therapeutic issue.

For each therapeutic issue listed:

- Select an issue type from the list;
- Enter your suggested therapy in the space provided;
- Enter any action the patient has taken in the space provided.

Use the **Del** button to delete a record from the **Issues** tab. Click **Next** to proceed.
**Topics**

The **Topics** tab provides a space to record topics that were discussed during the MedsCheck review.

Click **Ins** to add a topic.

For each topic listed, enter a summary of what was discussed with the patient.

Use the **Del** button to delete a record from the **Topics** tab. Click **Next** to proceed.
Goals

The Goals tab provides a space to record goals that you and the patient decided upon as a result of the MedsCheck review.

Click Ins to add a goal.

For each goal listed, enter a summary of what you and the patient want to accomplish.

Use the Del button to delete a record from the Goals tab. Click Next to proceed.
Goal Support

The **Goal Support** tab provides a space to record the steps the patient will take to accomplish the goals identified in the **Goals** tab.

Click **Ins** to add a goal support record.

For each goal support record listed, enter a summary of the steps the patient will take to accomplish their identified goals.

Use the **Del** button to delete a record from the **Goal Support** tab. Click **Next** to proceed.
Resources
The Resources tab provides a space to record a list of resources and contacts that have been suggested to the patient.

Click Ins to add a resource.

For each resource listed, enter a description of the resource and a contact number, if applicable.

Use the Del button to delete a record from the Resources tab. Click Next to proceed.
Referrals

The Referrals tab provides a space to record a list of referrals that have been suggested to the patient.

Click Ins to add a referral.

For each resource listed, enter a description of the resource and a contact number, if applicable.

Use the Del button to delete a record from the Resources tab. Click Next to proceed.
Checklist

The Checklist tab helps the pharmacist determine if a thorough MedsCheck review has been conducted. Place a checkmark next to each item you have covered during the review. If you have missed one or more items, go back to the applicable tab.

Place a checkmark next to each item to indicate the topic was discussed with the patient. Enter any comments in the space provided. Feel free to navigate through the tabs and record any information or discuss any topics you may have missed.

7. When you are finished, click Finalize Review.
8. The **MedsCheck Review** form will appear displaying the date, pharmacist, and assessment location. Make any necessary changes to this form, and enter the details of other professionals involved, if applicable. Click **OK**.

![MedsCheck Review Form](image)

**Affixing an Electronic Signature**

If you do not have an electronic signature configured, proceed to the [Printing a MedsCheck Review](#) section.

9. Have the patient sign his or her name on the electronic signature tablet. Click the **OK** button on the signature tablet.

![Electronic Signature Tablet](image)
The patient signature appears once the patient signs on the electronic signature tablet.

10. Have the pharmacist sign the electronic signature tablet.

11. When you are finished, tap **Done** on the signature tablet.
Printing a MedsCheck Review

12. The MedsCheck report print form will appear. Place a checkmark next to the printouts you want to generate. Printouts can be generated in French by selecting Français from the Print in language list.

13. Click Print. See the Sample Electronic MedsCheck Report section for a sample of each report.
Billing a MedsCheck Review

14. Once printing is complete, the fee-for-service claim will automatically populate in the F12 screen. If the user who performed the MedsCheck Review has an F7 - Doctor record with a ‘Pharmacist’ designation, that user’s information will populate in the doctor section of the F12 screen. The pharmacist’s license number must match the doctor number listed in the pharmacist’s F7 - Doctor record.

If the user does not have an F7 - Doctor record or if the MedsCheck Review 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.

15. Click F12 - Fill Rx. The claim will be transmitted to the appropriate party for payment.
Completing MedsChecks ‘Saved for Later’

1. To call up MedsCheck reviews saved for later or added to the Med Review Queue via auto prompting, do one of the following:

Via the F3 - Patient Card
a) Bring up the patient card using the F3 - Patient search and select Professional Services from the right navigation pane.
b) The Professional Services queue will appear. Select the MedsCheck record you want to complete and click F - Call Up.

![Professional Services Table]

Via the F9 - Workflow Screen
a) Select F9 - Workflow from the Alt+X - Start screen and select Professional Services from the right navigation pane.
b) The Professional Services queue will appear. Select the MedsCheck you want to complete and click F - Call Up.

![Professional Services Table]

2. Complete steps 4-15 of the Creating an Electronic MedsCheck Review section.
Sample Electronic MedsCheck Report

Pharmacists Worksheet

Page 1:
### Lifestyle information

<table>
<thead>
<tr>
<th>Tobacco</th>
<th>Yes</th>
<th>No</th>
<th>Cig/day</th>
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</thead>
<tbody>
<tr>
<td>Smoking Cessation status</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Recreational Drug Use</td>
<td>Yes</td>
<td>No</td>
<td>Frequency 1-2 times/month</td>
</tr>
<tr>
<td>Alcohol Use</td>
<td>Yes</td>
<td>No</td>
<td>Frequency 2-3 drinks/week</td>
</tr>
<tr>
<td>Exercise Regimen</td>
<td></td>
<td>1 hour daily</td>
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</tr>
<tr>
<td>Other (Specify)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Lifestyle information (notes)

**Moderation:**

### Clinical Need for Service (notes)

- Why are you (the pharmacist) conducting this MedsCheck service?
  - To identify possible duplicate therapy issues

**Patient Characteristics Contributing to the Need for the MedsCheck Service** (Select all that apply)

- 3 or more chronic medications
- Multiple acute conditions and/or one or more chronic diseases
- Medication regimen that includes one or more non-prescription medications
- Medication regimen that includes one or more natural health products
- Symptoms that seem unaddressed by current pharmacotherapy
- Potential drug therapy problem that may be prevented
- Multiple prescribers
- Issues relating to early vs. late refill
- Non-adherence
- Patient seems confused about medication regimen
- Medication(s) that require routine laboratory monitoring
- Abnormal lab results (blood work, creatinine clearance, etc.)
- Planned admission to a hospital or other health institution (i.e. – long-term care facility)
- Discharge/transition from hospital to community or other healthcare institution (i.e. – long-term care facility)
- Initiating compliance packaging
- Known or suspected poor or unstable renal function
- Known or suspected poor or unstable liver function
- Other (Specify)
**Sources Consulted to conduct this MedsCheck service**

| Family doctor |
|
| Pharmacy Profile |
| Physician / Nurse Practitioner |
| Patient |
| Caregiver / Agent |
| Another Pharmacy |
| Medication Packages |
| Laboratory / Test Values |
| Electronic Health Record |
| Hospital / Other Facility |
| Other (Specify) |

**Current Medication List** (attach printed records if available. Information to populate MedsCheck Personal Medication Record where appropriate)

| Medication1 |
| Name of Drug/Product (generic/brand) |
| Lyrica |

**Strength of Drug/Product**

| Dosage Form |
| CAP |
| TAB |

| Indication |
| Pain due to carpal tunnel |

**Directions for Use**

| TAKE AS DIRECTED |
| TAKE AS DIRECTED |

| Last Filled Date |
| 2017/01/16 |

| Adherence Issue |
| Yes |

| Rx/OTC/NHP? |
| Rx |

**Patient Comments** (i.e. how they actually take it, side effects, etc.)

| Patient does not take medication as directed |

**Pharmacist Notes** (i.e. disposition of drug therapy problem, recommendations, etc.)

| Comments for MedsCheck Record |
| Local |

**Medication2**

| Name of Drug/Product (generic/brand) |
| Cipralex |

**Strength of Drug/Product**

| Dosage Form |
| 20mg |

| Indication |
| For mild depression |

**Directions for Use**

| TAKE AS DIRECTED |
| TAKE AS DIRECTED |

| Last Filled Date |
| 2017/01/16 |

| Adherence Issue |
| No |

| Rx/OTC/NHP? |
| Rx |

**Patient Comments** (i.e. how they actually take it, side effects, etc.)

| Comments for MedsCheck Record |
| Local |
### MedsCheck Reviews - Ontario

**Page 4:**

<table>
<thead>
<tr>
<th>Medication</th>
<th>Name of Drug/Product (generic/brand)</th>
<th>Strength of Drug/Product</th>
<th>Dosage Form</th>
<th>Indication</th>
</tr>
</thead>
<tbody>
<tr>
<td>5% Dextrose &amp; 0.45% NaCl W 0.15% KCl 20 MEQ INJ</td>
<td></td>
<td></td>
<td>ML</td>
<td>TAKE AS DIRECTED</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Directions for Use</th>
<th>Last Filled Date</th>
<th>Adherence Issue</th>
<th>Rx? OTC? NHP?</th>
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</thead>
<tbody>
<tr>
<td>TAKE AS DIRECTED</td>
<td>2017/01/16</td>
<td>Yes</td>
<td>No</td>
</tr>
</tbody>
</table>

**Patient Comments:** (i.e., how they actually take it, side effects, etc.)

**Pharmacist Notes:** (i.e., disposition of drug therapy problem, recommendations, etc.)

---

<table>
<thead>
<tr>
<th>Medication</th>
<th>Name of Drug/Product (generic/brand)</th>
<th>Strength of Drug/Product</th>
</tr>
</thead>
<tbody>
<tr>
<td>Claritin 10mg</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Dosage Form</th>
<th>Indication</th>
</tr>
</thead>
<tbody>
<tr>
<td>TAB</td>
<td>For tooth pain</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Directions for Use</th>
<th>Last Filled Date</th>
<th>Adherence Issue</th>
<th>Rx? OTC? NHP?</th>
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</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Yes</td>
<td>No</td>
</tr>
</tbody>
</table>

**Patient Comments:** (i.e., how they actually take it, side effects, etc.)

**Pharmacist Notes:** (i.e., disposition of drug therapy problem, recommendations, etc.)

---

**Non-Prescription Medications / Herbs / Supplements**

<table>
<thead>
<tr>
<th>Medication</th>
<th>Name of Drug/Product (generic/brand)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tylenol With Codeine No. 4</td>
<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Strength of Drug/Product</th>
<th>Dosage Form</th>
<th>Indication</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>300-600mg</td>
<td>TAB</td>
<td>For tooth pain</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Directions for Use</th>
<th>Last Filled Date</th>
<th>Adherence Issue</th>
<th>Rx? OTC? NHP?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Yes</td>
<td>No</td>
</tr>
</tbody>
</table>

**Patient Comments:** (i.e., how they actually take it, side effects, etc.)

**Pharmacist Notes:** (i.e., disposition of drug therapy problem, recommendations, etc.)

---

**Clinically Relevant Discontinued Medications (if applicable)**

<table>
<thead>
<tr>
<th>Medication</th>
<th>Name of Drug/Product, Strength, Dosage Form, Directions for use on Previous Record</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Abbott-Citropran, 20mg, TAB, TAKE AS DIRECTED</td>
</tr>
</tbody>
</table>

**Notes (if applicable):**

Local

---

### KROLL Computer Systems Inc.

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406-47E (291677)
### Medication:
**Name of Drug/Product, Strength, Dosage Form, Directions for use on Previous Record**
A.C. And C. Tablets, 325mg, TAB, TAKE AS DIRECTED

**Notes**

---

### Therapeutic Issues Identified (if applicable)

**Therapeutic Withdrawal**
Therapeutic Withdrawal: drug may not be necessary

**Suggested Therapy**

**Action Taken**

---

### Checklist for Completeness

- [x] Asked about Rx medications from other individuals, MD samples, pharmacies and care providers
- [x] List of meds removed from home if applicable
- [x] Asked about OTC products purchased or obtained from another individual (including specifically ASA)
- [x] Asked about herbal or natural health products purchased or obtained from another individual
- [x] Prompted for specific dose forms which are often forgotten (e.g., inhalers, topical, eye drops, nasal sprays, patches, injectables, etc.)
- [x] Asked about anti-infectives used in the last 3 months.
- [x] Referenced attached notes, results, references as appropriate
- [x] Discussed circle of care, sharing information with other providers and the patient’s responsibility for providing accurate information

- [x] Discussed anticipated date of completion of patient’s MedsCheck Personal Medication Record (if not available at the time of the MedsCheck)

- [ ] Ensure clinically relevant information is documented and readily retrievable for continuity of care and for audit purposes

**Plan for Follow Up**

- [ ] Healthcare providers with whom to communicate

**Health Care Provider**

<table>
<thead>
<tr>
<th>Last Name</th>
<th>First Name</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Health Related Specialty**

---

### Summary and Goals (information to be added to the MedsCheck Patient Take-Home Summary)

**Summary of Today’s Discussion**

- Duplication of therapy, Weight management tips

**Patient Goals**

- Cease duplicate therapy, Consider dietary changes to support weight loss
What I Will Do To Get There
Meet with doctor to discuss duplicate therapy issues; Keep a food log to record dietary intake

List of Resources and Contacts Provided
Dr. Nancy Cho (dietician) - (444) 444-4444
Other Follow-up Planning and referrals
IMPACT Program to assist with medication management - (333) 333-3333

Prepared By
Pharmacist Full Name (Last Name, First Name)
Kroll Pharmacy

<table>
<thead>
<tr>
<th>GIC Number</th>
<th>Date of MedsCheck Review (MedsCheck is billed on the day of the consultation) (yyyy/mm/dd)</th>
</tr>
</thead>
<tbody>
<tr>
<td>0000000000</td>
<td>2017/01/10</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Appointment Time of MedsCheck Review</th>
<th>Date MedsCheck Documentation Completed (yyyy/mm/dd)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2017/01/19</td>
</tr>
</tbody>
</table>
# Personal Medication Record

## Patient Information
- **Patient Last Name:**
- **Patient First Name:**
- **Date of Birth:**

## Address
- **Address1:**
- **Address2:**
- **City/Town:**
- **Province:**
- **Postal Code:**

## Telephone Number
- **Telephone Number:**

## Sources of Care and/or Contact Name
- **Last Name:**
- **First Name:**

## Primary Care Provider
- **Last Name:**
- **First Name:**

## Current Medication List - Prescription, Non-Prescription, Natural Health Products

<table>
<thead>
<tr>
<th>Medication</th>
<th>Dose</th>
<th>Route</th>
<th>Duration</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>CAP Lyrica 50mg</td>
<td></td>
<td>Pain due to carpal tunnel</td>
<td>TAKE AS DIRECTED</td>
<td>Patient does not take medication as directed</td>
</tr>
<tr>
<td>TAB Cipralex 20mg</td>
<td></td>
<td>For mild depression</td>
<td>TAKE AS DIRECTED</td>
<td></td>
</tr>
</tbody>
</table>

## Pharmacist Name and Address
- **Pharmacist Name:** Kroll Pharmacy
- **Address:** 100 Kroll Drive

## MedsCheck Pharmacy Information
- **Location:** Kroll Pharmacy (8999-9999)
- **Pharmacy Telephone Number:** (555) 222-2222

## MedsCheck Report Information
- **Date of MedsCheck Report:** 2017/01/19
- **Phone Number:** (888) 888-8888

---

**Note:** The information in this document is for the patient's personal use and should not be shared with anyone else without the patient's consent. The pharmacist is responsible for the accuracy and completeness of the information provided in this document.
<table>
<thead>
<tr>
<th>WHAT I TAKE</th>
<th>WHY I TAKE IT</th>
<th>HOW I TAKE IT</th>
<th>COMMENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>L 5% Dextrose &amp; 0.45% NaCl W 0.13% KCL 20 MEQ INJ 3g-150mg 450mg/100mL</td>
<td>Disease, condition or symptoms it addresses</td>
<td>TAKE AS DIRECTED</td>
<td></td>
</tr>
<tr>
<td>Claritin 10mg</td>
<td>For season allergies</td>
<td></td>
<td></td>
</tr>
<tr>
<td>TAB Tylenol With Codeine No.4 300/60mg</td>
<td>For tooth pain</td>
<td>From Smith's Pharmacy - (555) 555-5555</td>
<td>Possible duplication of therapy</td>
</tr>
</tbody>
</table>

Attention Health Care Professionals: A more detailed version of this MedsCheck Review that includes professional notes is available from the pharmacy named. Sources of information in this document include (but are not limited to) local pharmacy data and the patient. The patient has been informed of the intent of the MedsCheck Review and on what to expect. The patient is responsible for the accuracy and completeness of the data they provided when this document was prepared and for advising the pharmacist of any change to these medications. The pharmacist is responsible for information in this document that changed as a result of providing a medication review service to the patient.

<table>
<thead>
<tr>
<th>Pharmacy Name and Address</th>
<th>MedsCheck Pharmacist Name</th>
<th>Pharmacy Telephone Number</th>
<th>Pharmacy Phone Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kroll Pharmacy</td>
<td>Kroll Pharmacy (99999999)</td>
<td>(252) 222-2222</td>
<td>(888) 888-8888</td>
</tr>
<tr>
<td>100 Kroclin Drive</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Toronto ON M1M 1M1</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Date: 2017/01/19
Pharmacist Signature
Disposés en Anglais
# MedsCheck Reviews - Ontario

## Patient Take-Home Summary

### Patient Information
- Last Name: [Last Name]
- First Name: [First Name]
- Date of Birth: [yyyy/mm/dd]
- Telephone Number: (123) 456-7890

### Pharmacy Information
- Pharmacy Name: [Kroll Pharmacy]
- Address: [100 Krollum Drive]
- City/Town: [Toronto]
- Postal Code: [M1M 1M1]

### Summary of Today's Discussion

#### Duplication of therapy

- My Goals
  - **Goal 1**: Cease duplicate therapy
    - Consider dietary changes to support weight loss
  - **Goal 2**: Meet with doctor to discuss duplicate therapy issues
    - Keep a food log to record dietary intake

#### Weight management tips

- **List of Resources and Contacts Provided**
  - Dr. Nancy Cho (dietician) - (444) 444-4444

#### Referrals Information
- **IMPACT Program to assist with medication management** - (333) 333-3333
The MedsCheck Program is a voluntary program sponsored by the Ontario Government. The MedsCheck patient take-home summary may be offered to you in addition to your MedsCheck Personal Medication Record.

<table>
<thead>
<tr>
<th>Prepared By</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pharmacist Full Name (Last Name, First Name)</td>
</tr>
<tr>
<td>Kroll Pharmacy (999999999)</td>
</tr>
<tr>
<td>Date of MedsCheck Review (yyyy/mm/dd)</td>
</tr>
<tr>
<td>2017/01/10</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Patient’s Signature</th>
<th>Pharmacist’s Signature</th>
</tr>
</thead>
</table>
Viewing a Completed MedsCheck Review

1. Bring up the patient card using the **F3 - Patient** search.

2. Select **Professional Services** from the right navigation pane.

3. The **Professional Services** screen will appear. To show reversed MedsCheck Reviews, check the **Show Reversals** flag.

4. Right-click the completed MedsCheck Review you want to view and select **View Details**.
5. The **Professional Service View** screen will appear. Click the various tabs to see information that was recorded during the review.

Any documents scanned into the system during the review will appear in the **Documents** tab:
6. Click **Print** to print the MedsCheck Review, or **View Signatures** to view the pharmacist’s or patient’s electronic signature, if electronic signatures have been captured.

### Paper MedsCheck Reviews

This section explains how to perform paper MedsCheck reviews. Paper MedsCheck reviews must be completed on paper, signed, and scanned back into the system.

**NOTE:** The MedsCheck prompt will not appear if the patient does not meet the criteria for a MedsCheck Review; however, based on other available information and your professional judgment, you can determine whether the patient might benefit from a MedsCheck Review and then manually create a MedsCheck Review.

### Configuring the ODB MedsCheck Prompt

Kroll will prompt you to create a MedsCheck Review when ‘**Prompt for ODB Med Checks**’ is enabled in the **Store Level Configuration Parameters > Rx > 3 - Prompting** screen.
When ‘Prompt for ODB Med Checks’ is enabled, the system screens each patient for MedsCheck eligibility each time an Rx is filled. If the patient is eligible, you will be prompted to perform a MedsCheck Review with the patient. Select one of the options below:

- **Print Report Now**: Calls up the MedsCheck Review report so you can select the items you would like to print on the report.

- **Print Report Later**: Places a record in the MedsCheck Review queue allowing you to print the MedsCheck Review at a later date or time. See section [Completing MedsCheck ‘Saved for Later’](#) for further details.

- **I have Other Rxs to fill for this patient**: Allows you to continue filling more Rxs for the patient before printing the report.

- **Do not prompt me until the next time the patient comes in**: Suppresses prompting for today. The next time the patient comes in to fill an Rx, you will be prompted for the MedsCheck Review.

- **Do not prompt until**: Allows you to dismiss the prompt for a specified number of days, or until a specified date, after which the prompt will appear.

- **Never prompt for this patient**: Suppresses any further prompts for this patient. This option is only available if the configuration option of **Allow ‘Never Prompt’ for MedsCheck Review** is enabled.
Creating a Paper MedsCheck Review (Manual)

1. Bring up the patient card using the F3 - Patient search.

2. Select Professional Services from the right navigation pane.

3. The Professional Services profile will appear. Select N - New > MedsCheck Review.
4. The MedsCheck Review/Dialog screen will appear. Select a review type from the dropdown menu and click Print Now. If you wish to add to the Med Review queue in order to print the MedsCheck Review later, click Save for Later.

5. The MedsCheck Review Selection screen will appear. Select the items you want included in the review and click OK.

A. Show Rxs since: The system will select Rxs to be reviewed based on the configured default Rx selection range. Enter an earlier starting date or select 'Show Rxs since Last review' and click Refresh to override the default setting.
B. **Rxs:** All Rxs in the patient profile that are eligible for MedsCheck Review. These Rxs are included in the review by default and can be manually de-selected.

C. **Show discontinued Rxs:** Allows you to show or hide discontinued (i.e., inactive) Rxs from the MedsCheck Review Selection list. Regardless of your selection, these Rxs will not be included in the review.

D. **Allergies:** Any allergy records that are in the patient card. Allergies are included in the review by default and cannot be de-selected.

E. **Medical Conditions:** Any medical condition records that are in the patient card. Medical conditions are included in the review by default and cannot be de-selected.

F. **Drug line 1:** Allows you to specify how drug line 1 will appear in the review. Options include Brand, Generic, and Default.

G. **Drug line 2:** Allows you to specify how drug line 2 will appear in the review. Options include Brand, Generic, and Default.
The symbols that appear in the MedsCheck Review Selection screen indicate the status and source of each review item. Hover your mouse over the icons to see a description.

<table>
<thead>
<tr>
<th>Symbol</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>🌟</td>
<td>Indicates the Rx was created since the last review</td>
</tr>
<tr>
<td>🔄</td>
<td>Indicates the Rx was included in the last review</td>
</tr>
<tr>
<td>❌</td>
<td>Indicates the Rx is inactive</td>
</tr>
<tr>
<td>🏡</td>
<td>Indicates the Rx was filled locally</td>
</tr>
<tr>
<td>🏡📝</td>
<td>Indicates the Rx was filled locally and it is currently included in a pending review</td>
</tr>
</tbody>
</table>

6. The MedsCheck Review form will appear displaying the date, pharmacist, and assessment location. Make any necessary changes to this form, and enter the details of other professionals involved, if applicable. Click OK.

![MedsCheck Review Form Screenshot]
7. The **MedsCheck report** print form will appear. Click through each of the tabs and specify the number of lines you want printed for each item.

8. Click **Print**. See the [Sample Paper MedsCheck Report](#) section for a detailed sample of each report.
Scanning MedsCheck Reports

9. From the **Alt-X Start** screen, go to **Utilities > Printed Document Scan/Import**.

![Image of the Alt-X Start screen]

10. The **Import Scanned Documents** screen will appear. Place the report pages face down on the scanner hopper. Check **Scan both sides of paper** if you are scanning pages with information on both sides and your scanner supports dual side scanning. Click **Start Scanning**.

![Image of the Import Scanned Documents screen]
11. When scanning is complete, the screen will indicate how many pages were scanned successfully and how many will need to be manually reconciled. When you are finished, click **Process and Reconcile**.

12. The **Document Scan Reconciliation** screen will appear. Items ready to be processed will appear in the **Documents to be created** section. Items that need to be reconciled will appear in the **Unprocessed Images** section.
13. If all pages were scanned successfully and appear in the Documents to be created section, click the Process Pending Documents button. Click Cancel to close the screen.

**Billing a MedsCheck Review**

14. Once printing is complete, the fee-for-service claim will automatically populate in the F12 screen. If the user who performed the MedsCheck Review has an F7 - Doctor record with a ‘Pharmacist’ designation, that user’s information will populate in the doctor section of the F12 screen. The pharmacist’s license number must match the doctor number listed in the pharmacist’s F7 - Doctor record.

If the user does not have an F7 - Doctor record or if the MedsCheck Review 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.

15. Click F12 - Fill Rx. The claim will be transmitted to the appropriate party for payment.
Completing MedsChecks ‘Saved for Later’

1. To call up MedsCheck reviews saved for later, do one of the following:

Via the F3 - Patient Card
a) Bring up the patient card using the F3 - Patient search and select Professional Services from the right navigation pane.
b) The Professional Services queue will appear. Select the MedsCheck record you want to complete and click F - Call Up.

<table>
<thead>
<tr>
<th>Professional Services</th>
</tr>
</thead>
<tbody>
<tr>
<td>N - New</td>
</tr>
<tr>
<td>D - Pharmacist Declined</td>
</tr>
<tr>
<td>Items (1)</td>
</tr>
<tr>
<td>MedsCheck Annual</td>
</tr>
</tbody>
</table>

Via the F9 - Workflow Screen
a) Select F9 - Workflow from the Alt+X - Start screen and select Professional Services from the right navigation pane.
b) The Professional Services queue will appear. Select the MedsCheck you want to complete and click F - Call Up.

<table>
<thead>
<tr>
<th>Professional Services</th>
</tr>
</thead>
<tbody>
<tr>
<td>P - Print/Reprint</td>
</tr>
<tr>
<td>D - Pharmacist Declined</td>
</tr>
<tr>
<td>Test, Immunization</td>
</tr>
<tr>
<td>Test, Immunization</td>
</tr>
<tr>
<td>Test, Patient</td>
</tr>
</tbody>
</table>

2. Complete steps 4-15 of the Creating a Paper MedsCheck Review section.
# Sample Paper MedsCheck Report

## Pharmacists Worksheet

### Page 1:

<table>
<thead>
<tr>
<th>Patient Information</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Last Name</td>
<td>Test</td>
</tr>
<tr>
<td>Gender</td>
<td>Date of Birth (yyyy/mm/dd)</td>
</tr>
<tr>
<td>First Name</td>
<td>Patient</td>
</tr>
<tr>
<td>Health Card Number</td>
<td>Telephone Number</td>
</tr>
<tr>
<td>Address 1</td>
<td>Address 2</td>
</tr>
<tr>
<td>City/Town</td>
<td>Province</td>
</tr>
<tr>
<td>Toronto</td>
<td>ON</td>
</tr>
<tr>
<td>Postal Code</td>
<td>M1M 1M1</td>
</tr>
</tbody>
</table>

Date Patient Signed Annual Acknowledgement Form (yyyy/mm/dd):

<table>
<thead>
<tr>
<th>Caregiver/Patient’s Agent Information</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Last Name</td>
<td>First Name</td>
</tr>
<tr>
<td>Telephone Number</td>
<td>Email Address</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Notes</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Primary Care Provider</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Last Name</td>
<td>First Name</td>
</tr>
<tr>
<td>Designation</td>
<td></td>
</tr>
<tr>
<td>Telephone Number</td>
<td>Fax Number</td>
</tr>
<tr>
<td>Email Address</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Known Allergies and Intolerances</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Select if there are any known allergies or intolerances</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Tools</th>
</tr>
</thead>
</table>

Interview Conducted At:

- [ ] Pharmacy
- [ ] Pharmacy Name
- [ ] Kroll Pharmacy

<table>
<thead>
<tr>
<th>Address 1</th>
<th>Address 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>100 Elm Drive</td>
<td></td>
</tr>
<tr>
<td>City/Town</td>
<td>Province</td>
</tr>
<tr>
<td>Toronto</td>
<td>ON</td>
</tr>
<tr>
<td>Postal Code</td>
<td>M1M 1M1</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Patient’s Name</th>
<th>Address 1</th>
<th>Address 2</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

| |  |
| |  |
**Lifestyle Information**

- Tobacco: [ ] Yes, [ ] No
- Smoking Cessation Status: [ ]
- Recreational Drug Use: [ ] Yes, [ ] No
- Alcohol Use: [ ] Yes, [ ] No
- Exercise Regimen: [ ]
- Other (Specify): [ ]

**Clinical Need for Service (notes)**

Why are you [the pharmacist] conducting this MedsCheck service?

**Patient Characteristics Contributing to the Need for the MedsCheck Service (Select all that apply)**

- [ ] 3 or more chronic medications
- [ ] Multiple acute conditions and/or one or more chronic diseases
- [ ] Medication regimen that includes one or more non-prescription medications
- [ ] Medication regimen that includes one or more natural health products
- [ ] Symptoms that seem unaddressed by current pharmacotherapy
- [ ] Potential drug therapy problem that may be prevented
- [ ] Multiple prescribers
- [ ] Issues relating to early- or late refills
- [ ] Non-adherence
- [ ] Patient seems confused about medication regimen
- [ ] Medication(s) that require routine laboratory monitoring
- [ ] Abnormal lab results (blood work, creatinine clearance, etc.)
- [ ] Planned admission to a hospital or other health institution (i.e., long-term care facility)
- [ ] Discharge/transition from hospital to community or other healthcare institution (i.e., long-term care facility)
- [ ] Inability to comply with packaging
- [ ] Known or suspected poor or unstable renal function
- [ ] Known or suspected poor or unstable liver function
- [ ] Other (Specify): [ ]
### Sources Consulted to Conduct this MedsCheck Service

- Pharmacy Profile
- Physician / Nurse Practitioner
- Patient
- Caregiver / Agent
- Another Pharmacy
- Medication Packages
- Laboratory / Test Values
- Electronic Health Record
- Hospital / Other Facility
- Other (Specify)

### Current Medication List (attach printed records if available. Information to populate MedsCheck Personal Medication Record where appropriate)

<table>
<thead>
<tr>
<th>Medication1</th>
<th>Name of Drug/Product (generic/brand)</th>
<th>Lyrica</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strength of Drug/Product</td>
<td>50mg</td>
<td></td>
</tr>
<tr>
<td>Dosage Form</td>
<td>CAP</td>
<td></td>
</tr>
<tr>
<td>Directions for Use</td>
<td>TAKE AS DIRECTED</td>
<td></td>
</tr>
<tr>
<td>Last Filed Date</td>
<td>2017/01/16</td>
<td></td>
</tr>
<tr>
<td>Adherence Issue</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Rx? OTC? NHPP?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Patient Comments (i.e. how they actually take it, side effects, etc.)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

| Pharmacist Notes (i.e. disposition of drug therapy problem, recommendations, etc.) |

| Comments for MedsCheck Record |

---

<table>
<thead>
<tr>
<th>Medication2</th>
<th>Name of Drug/Product (generic/brand)</th>
<th>Ciproflax</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strength of Drug/Product</td>
<td>500mg</td>
<td></td>
</tr>
<tr>
<td>Dosage Form</td>
<td>TAB</td>
<td></td>
</tr>
<tr>
<td>Directions for Use</td>
<td>TAKE AS DIRECTED</td>
<td></td>
</tr>
<tr>
<td>Last Filed Date</td>
<td>2017/01/16</td>
<td></td>
</tr>
<tr>
<td>Adherence Issue</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Rx? OTC? NHPP?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Patient Comments (i.e. how they actually take it, side effects, etc.)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

| Pharmacist Notes (i.e. disposition of drug therapy problem, recommendations, etc.) |

| Comments for MedsCheck Record |
### Medication:
**Name of Drug/Product (generic/brand):**
- Abbott-Citalopram

**Strength of Drug/Product:**
- 20mg

**Dosage Form:**
- TAB

**Directions for Use:**
- TAKE AS DIRECTED

**Last Filled Date:**
- 2017/01/19

**Adherence Issue:**
- No

**Rx? OTC? N/A?**
- N/A

**Patient Comments:**
- (i.e., how they actually take it, side effects, etc.)

**Pharmacist Notes:**
- (i.e., disposition of drug therapy problem, recommendations, etc.)

**Comments for MedsCheck Record:**

### Medication:
**Name of Drug/Product (generic/brand):**
- 5% Dextrose & 0.45% NaCl W 0.15% KCL 20 MEQ INJ

**Strength of Drug/Product:**
- 5G/150mg-450mg/100mL

**Dosage Form:**
- ML

**Directions for Use:**
- TAKE AS DIRECTED

**Last Filled Date:**
- 2017/01/19

**Adherence Issue:**
- No

**Rx? OTC? N/A?**
- N/A

**Patient Comments:**
- (i.e., how they actually take it, side effects, etc.)

**Pharmacist Notes:**
- (i.e., disposition of drug therapy problem, recommendations, etc.)

**Comments for MedsCheck Record:**

### Medication:
**Name of Drug/Product (generic/brand):**
- A.C. And C Tablets

**Strength of Drug/Product:**
- 325mg

**Dosage Form:**
- TAB

**Directions for Use:**
- TAKE AS DIRECTED

**Last Filled Date:**
- 2017/01/19

**Adherence Issue:**
- No

**Rx? OTC? N/A?**
- N/A

**Patient Comments:**
- (i.e., how they actually take it, side effects, etc.)

**Pharmacist Notes:**
- (i.e., disposition of drug therapy problem, recommendations, etc.)

**Comments for MedsCheck Record:**

### Clinically Relevant Discontinued Medications (if applicable):
**Medication:**

**Name of Drug/Product, Strength, Dosage Form, Directions for use on Previous Record**

**Notes:**
- (if applicable)
### Therapeutic Issues Identified (if applicable)

**Therapeutic Issue**

**Suggested Therapy**

**Action Taken**

**Notes**

### Checklist for Completeness

- [ ] Asked about Rx medications from other individuals, MD samples, pharmacies and care providers

- [ ] List of meds removed from home if applicable

- [ ] Asked about OTC products purchased or obtained from another individual (including specifically ASA)

- [ ] Asked about herbal or natural health products purchased or obtained from another individual

- [ ] Prompted for specific dosage forms which are often forgotten (i.e. inhalers, topicals, eye drops, nasal sprays, patches, injectables, etc.)

- [ ] Asked about anti-infectives used in the last 3 months

- [ ] Referenced attached notes, results, references as appropriate

- [ ] Discussed circle of care, sharing information with other providers and the patient's responsibility for providing accurate information

- [ ] Discussed anticipated date of completion of patient's MedsCheck Personal Medication Record (if not available at the time of the MedsCheck)

- [ ] Ensure clinically relevant information is documented and readily retrievable for continuity of care and for audit purposes

### Other (Specify)

### Plan for Follow-Up

- [ ] Healthcare providers with whom to communicate

  - **Healthcare Provider 1**
    - **First Name**
    - **Last Name**

- [ ] Related Specialty

### Summary and Goals (information to be added to the MedsCheck Patient Take-Home Summary)

#### Summary of Today's Discussion

**Patient Goals**

**What I Will Do To Get There**

**List of Resources and Contacts Provided**

**Other Follow-up Planning and referrals**
<table>
<thead>
<tr>
<th>Prepared By</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pharmacist Full Name (Last Name, First Name)</td>
</tr>
<tr>
<td>OCP Number</td>
</tr>
<tr>
<td>Appointment Time of MedsCheck Review</td>
</tr>
</tbody>
</table>
# Personal Medication Record

## Patient Information

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Patient Last Name</td>
<td>Test</td>
</tr>
<tr>
<td>Address 1</td>
<td>123 Any St</td>
</tr>
<tr>
<td>Telephone Number</td>
<td>(123) 456-7890</td>
</tr>
<tr>
<td>Date of Birth</td>
<td>1940-01-01</td>
</tr>
</tbody>
</table>

## Current Medication List - Prescription, Non-Prescription, Natural Health Products

<table>
<thead>
<tr>
<th>Name</th>
<th>Dose</th>
<th>Frequency</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>CAP Lyrica 30mg</td>
<td></td>
<td></td>
<td>TAKE AS DIRECETED</td>
</tr>
<tr>
<td>TAB Cipralex 20mg</td>
<td></td>
<td></td>
<td>TAKE AS DIRECETED</td>
</tr>
<tr>
<td>TAB Abbott Citalopram 20mg</td>
<td></td>
<td></td>
<td>TAKE AS DIRECETED</td>
</tr>
</tbody>
</table>

**Attention Health Care Professionals:** A more detailed version of this MedsCheck Review that includes professional notes is available from the pharmacy named. Sources of information in this document include (but are not limited to) local pharmacy data and the patient. The patient has been informed of the existence of the MedsCheck Review and on what to report. The pharmacist is responsible for this accuracy and completeness of the data that provided this document was prepared and for advising the pharmacist of any changes to these medications. The pharmacist is responsible for informing the patient in this document that changed an amount of a medication review service to the patient.

**Pharmacy Name and Address:**

Kroll Pharmacy
100 Kroll Ave, Drive
Toronto ON M1M 1M1

**MedsCheck Pharmacist Name:**

**Pharmacy Telephone Number:** (222) 222-2222
<table>
<thead>
<tr>
<th>WHAT I TAKE</th>
<th>WHY I TAKE IT</th>
<th>HOW I TAKE IT</th>
<th>COMMENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>ML 5% Dextrose &amp; 0.45% NaCl W</td>
<td></td>
<td>TAKE AS DIRECTED</td>
<td></td>
</tr>
<tr>
<td>0.15% KCl 50 MEQ INY 5G 150mg 450mg/100mL</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>TAB A.C. And C Tablets 325mg</td>
<td></td>
<td>TAKE AS DIRECTED</td>
<td></td>
</tr>
</tbody>
</table>

Attention Health Care Professionals: A more detailed version of this MedsCheck Review that includes professional notes is available from the pharmacy named. Sources of information in this document include (but are not limited to) local pharmacy data and the patient. The patient has been informed of the intent of the MedsCheck Review and on what to expect. The patient is responsible for the accuracy and completeness of the data they provided when this document was prepared and for advising the pharmacist of any change to these medications. The pharmacist is responsible for informing the patient in this document that changed as a result of providing a medication review service to the patient.
Healthcare Provider Notification of MedsCheck Services

To: ___________________________ Fax: ___________________________
Telephone Number: ___________________________ Pages: ___________________________
EmailAddress: ___________________________ Date (yyyy/mm/dd): 2017/01/19

Re: Patient's Name: Test, Patient
Patient's Address: 123 Any St, Toronto ON M1M 1M1
Telephone Number: (123) 456-7890

Our mutual patient noted above has had a MedsCheck completed by our pharmacist on ___________________________.

The MedsCheck program aims to ensure that patients take medications as prescribed. It also aims to resolve or prevent any drug therapy problems identified by the patient or the pharmacist.

The resulting comprehensive MedsCheck Personal Medication Record is attached consolidating his/her prescription, non-prescription and natural health product profile.

This MedsCheck Personal Medication Record is for your reference and may be included as part of your patient’s ongoing medical record.

Please see attached

Please take note of the following:
☐ No follow-up issues have been identified at this time. The MedsCheck Personal Medication Record is an accurate assessment of the patient’s prescription, non-prescription and natural health product usage at this current moment.
☐ Follow-up issues have been identified with this MedsCheck review, and they have been summarized and are attached with this fax transmission.

Issues

Pharmacist Name: ___________________________ Pharmacist's Signature: ___________________________
Patient Take-Home Summary

<table>
<thead>
<tr>
<th>Patient Information</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Last Name</td>
<td>Test</td>
</tr>
<tr>
<td>Date of Birth</td>
<td>Telephone Number</td>
</tr>
<tr>
<td>(yyyy/mm/dd)</td>
<td>(123) 456-7890</td>
</tr>
<tr>
<td>Pharmacy Name</td>
<td>Patient</td>
</tr>
<tr>
<td>Address</td>
<td>Address2</td>
</tr>
<tr>
<td>City/Town</td>
<td>Province</td>
</tr>
<tr>
<td>Toronto</td>
<td>ON</td>
</tr>
<tr>
<td>Telephone Number</td>
<td>Fax Number</td>
</tr>
<tr>
<td>(222) 222-2222</td>
<td>(888) 888-8888</td>
</tr>
<tr>
<td>Email Address</td>
<td>Description</td>
</tr>
<tr>
<td>(if available)</td>
<td>Summaries</td>
</tr>
<tr>
<td>Summary of Today's Discussion</td>
<td></td>
</tr>
<tr>
<td>My Goals</td>
<td>Goal 1</td>
</tr>
<tr>
<td>What I Will Do To Get There</td>
<td></td>
</tr>
<tr>
<td>What I Will Do To Get There</td>
<td></td>
</tr>
<tr>
<td>List of Resources and Contacts Provided</td>
<td></td>
</tr>
<tr>
<td>List of Resources and Contacts Provided</td>
<td></td>
</tr>
<tr>
<td>Referrals Information</td>
<td></td>
</tr>
<tr>
<td>Referral 1</td>
<td></td>
</tr>
<tr>
<td>The MedsCheck Program is a voluntary program sponsored by the Ontario Government. The MedsCheck patient take-home summary may be offered to you in addition to your MedsCheck Personal Medication Record.</td>
<td></td>
</tr>
<tr>
<td>Prepared By</td>
<td></td>
</tr>
<tr>
<td>Pharmacist Full Name (Last Name, First Name)</td>
<td></td>
</tr>
<tr>
<td>Date of MedsCheck Review (yyyy/mm/dd)</td>
<td></td>
</tr>
<tr>
<td>Patient's Signature</td>
<td>Pharmacist's Signature</td>
</tr>
</tbody>
</table>
Viewing a Completed MedsCheck Review

1. Bring up the patient card using the F3 - Patient search.

2. Select Professional Services from the right navigation pane.

3. To show reversed MedsCheck Reviews, check the Show Reversals flag.

4. Right-click the completed MedsCheck Review you want to view and select View Details.
5. The **Professional Service View** screen will display the scanned image of the completed MedsCheck Review. Scanned MedsCheck Reviews are also viewable from **Patient Documents**.
Declined and Refused MedsCheck Reviews

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

**NOTE:** MedsCheck Review records that are declined by the pharmacist or patient refused can also be noted in the F9 - Workflow > Professional Services screen.

**Pharmacist Declined**

1. Bring up the patient card using the F3 - Patient search.
2. Select Professional Services from the right navigation pane.
3. Select the appropriate MedsCheck review and click D - Pharmacist Declined.
4. Select the appropriate option from the Decline/Refuse prompt.

- If you select **Do not prompt until the next time the patient comes in**, no further action is required until the next time the patient visits the pharmacy.
- If you select **Do not prompt until...** you will be prompted to specify the next time you want to be prompted for the patient’s MedsCheck review. Complete the form and click OK.
• If you select **Never Prompt for this patient** you will not receive any additional MedsCheck prompts for the patient.

**Patient Refused**

1. Bring up the patient card using the **F3 - Patient** search.

2. Select **Professional Services** from the right navigation pane.

3. Select the appropriate MedsCheck review and click **R - Patient Refused**.

4. Select the appropriate option from the **Decline/Refuse** prompt.

• If you select **Do not prompt until the next time the patient comes in** you will be prompted to specify if the review was declined by the **Patient** or **Someone Else**.
If you select **Someone Else**, the **MedsCheck Review/Dialog Refusal** form will appear. Click the lookup button next to the **Select agent** field to search for the patient who refused the review. Select a relationship from the **Relationship to patient** menu and click **OK**.

- No further action is required until the next time the patient visits the pharmacy.
  - If you select **Do not prompt until...** you will be prompted to specify the next time you want to be prompted for the patient’s MedsCheck review. Complete the form and click **OK**.
  - If you select **Never Prompt for this patient** you will not receive any additional MedsCheck prompts for the patient.

**NOTE:** MedsCheck Reviews that have been refused or declined cannot be deleted from the Professional Services queue.
MedsCheck Review Statuses

This section explains the statuses that appear in the patient’s Professional Services profile at various stages throughout the MedsCheck review process.

To adjust the columns that appear on this screen, select Extra Functions > Change Columns.

Select the columns you want to appear. Use the Move Up and Move Down buttons to rearrange the column order. Click OK.
Status

Pending
Reviews that have been initiated but have not yet been completed.

Printed Paper
Reviews that have been printed but have not yet been billed.

Completed Electronic/Paper
Reviews that have been printed and billed.

Declined by Pharmacist
Reviews that have been declined by the pharmacist.

Refused by Patient
Reviews that have been refused by the patient.
Fee Status

**Review Not Completed Yet**
Reviews that have been initiated but have not yet been completed.

**No Fee Applicable**
Reviews with no associated fees (usually declined or refused reviews).

**Pending Claim**
*Electronic reviews:* Completed reviews with a Status of **Completed**.
*Paper reviews:* Reviews that have been printed and the option **Require Document scan to complete Paper Med Review** is off, and reports that have been printed and scanned back into the system if this option is enabled.

**Follow-ups**
The numbers that appear next to the ‘Pending’ and ‘Resolved’ statuses indicate the number of follow-up records associated with each MedsCheck Review and the respective status of those records.

### Pending 1
One follow-up record exists for the MedsCheck Review.

### Pending 2
Two follow-up records exist for the MedsCheck Review.
Resolved 1/1
One follow-up record was created for the MedsCheck Review and it is complete.

Resolved 2/2
Two follow-up records were created for the MedsCheck Review and both are complete.

Resolved 1/2
Two follow-up records were created for the MedsCheck Review; one is complete and one is pending.
Patient and Physician Letters

Patient and physician letters are used to inform patients that they qualify for a MedsCheck Review session, and to inform physicians that one of their patients has undergone a MedsCheck Review session.

Configuration

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

Enabling Letter Prompting

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

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

2. Click **Edit Templates**.

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

![Letter Template](image)

{StoreName}

Dear (PatientFirstName) (PatientLastName),

Upon review of your medication profile, it has been determined that you currently qualify for an Annual Review with one of our pharmacists.

During this private meeting, we will:

- Ensure that you completely understand your medication, what they are for and how to take them correctly.
- Update our records to reflect any changes made to your medications.
- Review any over-the-counter and/or herbal medications or prescriptions from other pharmacies that you are taking and ensure that they are added to your profile in our computer system.

The review will take approximately 30 minutes and cover issues such as side effects you may be experiencing and how to manage them, drug interactions, and the need for compliance packaging. You will receive a complete and accurate medication list that may be taken to your physician or other health care provider.

Please speak to any of our pharmacy team today to schedule your review.

C) Use the text editing tools along the top of the screen to make any necessary formatting changes.
d) Click ‘...’ to add a store logo. Locate the logo file in your local system and click Open. Or, if you have a store logo loaded in Reports > General, click Use Store Logo.

![Edit Patient Letter for 'MedsCheck Annual Review'](image_url)

{StoreName}
{StoreAddress1} {StoreCity} {StoreProv} {StorePostal}
{StorePhone}

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

![Edit Patient Letter for 'MedsCheck Annual Review'](image_url)

{StoreName}
{StoreAddress1} {StoreCity} {StoreProv} {StorePostal}
{StorePhone}

Dear {PatientFirstName} {PatientLastName},

Upon review of your medication profile, it has been determined that you currently qualify for an Annual Review with one of our pharmacists.

Date: {Date}

f) Make any necessary changes to the body text.

5. Click Preview to preview the letter and OK to save it.

6. Click Save to close the MedsCheck Review Patient Letters screen.
Patient Letters

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

Manually Generating a Patient Letter

1. Bring up the patient card using the F3 - Patient search.
2. Select Professional Services from the right navigation pane.
4. Select the appropriate review type from the Type list and click Save for later.
5. A prompt will appear asking if you would like to print a “Dear Patient” letter for the selected review type. Answer Yes.

The patient letter will generate.
Generating a Patient Letter during Prescription Filling

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

1. Call up the **F12 - New Rx** screen and complete the patient, drug, prescriber, and dispensing fields. Click **F12 - Fill Now**.

2. If the patient qualifies for a MedsCheck Review, you will be prompted to add the patient to the MedsCheck Review queue. If the patient agrees to the MedsCheck Review, select **Add to Med Review Queue**.

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

The patient letter will generate.
Sample Patient Letter

Date: 2017-Jan-19

Dear Test Patient,

Upon review of your medication profile, it has been determined that you currently qualify for an Annual Review with one of our pharmacists.

During this private meeting, we will:

   • Ensure that you completely understand your medication, what they are for and how to take them correctly.
   • Update our records to reflect any changes made to your medications.
   • Review any over-the-counter and/or herbal medications or prescriptions from other pharmacies that you are taking and ensure that they are added to your profile in our computer system.

The review will take approximately 30 minutes and cover issues such as side effects you may be experiencing and how to manage them, drug interactions, and the need for compliance packaging. You will receive a complete and accurate medication list that may be taken to your physician or other health care provider.

Please speak to any of our pharmacy team today to schedule your review.

Your pharmacist: Kroll
Physician Letters

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

Configuring ‘No Professional Services Faxes’

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

1. Call up the F7 - Doctor screen for the selected physician.
2. Place a checkmark next to No Professional Service Faxes.

Generating a Physician Letter

**NOTE:** The following steps describe how to generate a physician letter in electronic mode. If you are using paper mode, the physician letter will print along with the MedsCheck Report. The pharmacist who completed the MedsCheck Review must then complete the physician letter, fax it to the physician(s), and then scan it back into the system.

1. Create a MedsCheck Review record.
2. If you have physician letter prompting enabled, a doctor letter selection screen will appear.

If you do not have physician letter prompting enabled and you want to send a physician letter, click Select Doctors for Letter from the right navigation pane of the MedsCheck Review screen (Electronic mode only).
You can also generate a physician letter by right-clicking a completed MedsCheck Review from the Professional Services screen and selecting Print Doctor Letter (Electronic or Paper mode).

3. The Send Letter to Doctors selection screen will appear. This screen lists the doctors who prescribed the Rxs selected for the MedsCheck Review.

4. Place a checkmark next to the doctor(s) you want the letter sent to. Click Select / deselect all doctors to select or deselect all doctors in the list.
5. To add a doctor to the list, click Ins and perform a doctor search. The doctor will be added to the Send Letter to Doctors selection screen.

**NOTE:** A red ‘No Faxes’ note below the physician’s name indicates ‘No Professional Service Faxes’ is enabled in the F7 - Doctor card.

6. Select the appropriate ‘Notes to Doctor’ option based the presence of absence of identified follow-up issues.

7. Click OK.

8. The Healthcare Provider Notification of MedsCheck Services letter will print. Sign the letter and scan it back into the system using the Document Scan Utility.

9. Once scanned, the physician letter will appear in the Outbound Fax screen, ready to be sent. See the Sending and Receiving Faxes user guide for instructions on how to send outbound faxes.

**Viewing Doctor Letter History**

1. Bring up the patient card using the F3 - Patient search.

2. Select Professional Services from the right navigation pane.

3. Right-click the MedsCheck Review you want to view doctor letter history for and select View Doctor Letter History.
4. The **History for MedsCheck Annual** screen will appear, showing all history items associated with the review. Click a history item to view more information.

5. Click **Close** to exit the **History for MedsCheck Annual** screen.
Sample Physician Letter

Healthcare Provider Notification of MedsCheck Services

To: Doctor, Test

Fax Number: (123) 222-2222

Telephone Number: (123) 555-5555

Email Address: 

Date (yyyy/mm/dd): 2017/01/19

Pages: 1

Re: Patient’s Name: Test, Patient

Patient’s Address: 123 Any St, Toronto ON M1M 1M1

Telephone Number: (123) 456-7890

Our mutual patient noted above has had a MedsCheck completed by our pharmacist on 2017/01/19

The MedsCheck program aims to ensure that patients take medications as prescribed. It also aims to resolve or prevent any drug therapy problems identified by the patient or the pharmacist.

The resulting comprehensive MedsCheck Personal Medication Record is attached consolidating the patient’s prescription, non-prescription and natural health product profile.

This MedsCheck Personal Medication Record is for your reference and may be included as part of your patient’s ongoing medical record.

Please see attached

Please take note of the following:

- No follow-up issues have been identified at this time. The MedsCheck Personal Medication Record is an accurate assessment of the patient’s prescription, non-prescription and natural health product usage at this current moment.

- Follow-up issues have been identified with this MedsCheck review, and they have been summarized and are attached with this fax transmission.

Issues:

- Therapeutic Dilemma: drug may not be necessary

Pharmacist Name: Kroll Pharmacy (99999999)

Pharmacist’s Signature:

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