Medication Reviews

New Brunswick
# Contents

**Configuration** ................................................................. 1  
- Configuring Electronic Signatures .................................................. 1  
- Configuring Electronic Medication Reviews ........................................ 2  

**Electronic Medication Reviews** .................................................. 3  
- Configuring the Medication Review Prompt ...................................... 3  
- Creating an Electronic Medication Review (Manual) ......................... 5  
- Affixing an Electronic Signature .................................................. 12  
- Printing a Medication Review .................................................... 13  
- Billing a Medication Review ..................................................... 13  
- Medication Review Options ...................................................... 14  
- Completing Medication Review ‘Saved for Later’ ............................. 19  
- Sample Electronic Medication Review Report ................................... 20  
- Viewing a Completed Medication Review ....................................... 21  

**Paper Medication Reviews** ....................................................... 23  
- Configuring the Medication Review Prompt ..................................... 23  
- Creating a Paper Medication Review (Manual) ................................. 25  
- Scanning Medication Review Reports ............................................ 27  
- Billing a Medication Review ..................................................... 29  
- Completing Medication Review ‘Saved for Later’ ............................. 29  
- Sample Paper Medication Review Report ....................................... 30  
- Viewing a Completed Medication Review ....................................... 30  

**Declined and Refused Medication Reviews** .................................. 31  
- Pharmacist Declined ...................................................................... 31  
- Patient Refused ........................................................................... 32  

**Medication Review Statuses** ....................................................... 34  
- Statuses ....................................................................................... 34  
- Fee Statuses ................................................................................ 35
Medication Reviews – New Brunswick

This document outlines how to configure Medication Review functionality in Kroll and the process of completing Medication 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 Medication Review functionality.

Configuring Electronic Signatures

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

Before you can begin configuring electronic signatures, **Allow Electronic Signatures** must be enabled in File > Configuration > Kroll > Configuration. This will require a support call and must be completed before proceeding.

1. Go to File > Configuration > Store > General.
2. Place a checkmark next to **Allow Electronic Signatures**.
3. Click OK to save the changes.
Configuring Electronic Medication Reviews


2. In the Med Reviews/Dialogs area above, ensure the following options are set appropriately.
   - **Require Document Scan to Complete Paper Med Review**: this option allows you to complete paper-based Medication Review using the document scan functionality;
   - **Enable Electronic Med Reviews**: enabling this option allows you to use the electronic version of Medication Review;
   - **Require Electronic Signature**: enabling this option prompts for electronic signatures where necessary (only if you are using Electronic Signature pads);
   - **Allow Editing Counseling Time**: this option allows you to modify the system-calculated amount of time it took to complete the counseling session.

3. Click OK.
NOTE: If you turn off the Require Electronic Signature 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.

Electronic Medication Reviews

This section explains how to perform an Electronic Medication Review. Ensure your system is configured for Electronic Medication Reviews before proceeding. See Paper Medication 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 Medication Review. However, based on other available information and your professional judgement, you can determine whether the patient might benefit from a Medication Review and then manually create a Medication Review.

Configuring the Medication Review Prompt

The system prompts for Medication Review when the option Prompt for Medication Review is enabled under File > Configuration > Store > Rx > Prompting.
When the option ‘Prompt for Medication Review’ is enabled, the system screens each patient for Medication Review eligibility every time an Rx is processed. If the patient is eligible, the user is prompted and presented with a number of options as shown below.

- **Add to Med Review Queue**: Selecting this option adds the Med Review record to the Medication 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 Medication 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 Medication Review is enabled.

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

1. Bring up the patient card using the **F3 Patient** search.
2. Select **Medication Review/Dials** from the right navigation pane.


4. The **Medication Review/Dialog** screen will appear. Select a review type from the dropdown menu and click **Perform Now**. If you wish to add to the Med Review queue in order to complete the Medication Review later, click **Save for Later**.
5. The **Medication Review Rx Selection** screen will appear. Rxs under the **Pre-Selected** tab are selected by default; Rxs on the other tabs are not. Proceed through each tab and check the Rxs you want included in the report. When you are finished, click **OK**.

![Medication Review Rx Selection](image)

6. The **NB PharmaCheck Medication Check-up** 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 **NB PharmaCheck Medication Check-up** screen appears.
Questions

The Questions tab includes a list of questions that the pharmacist is to ask the patient to better understand their situation. Answers are recorded by selecting the appropriate option from each dropdown menu.

Medical History

The Medical History tab displays the medications that have been selected on the Medication Review Rx Selection screen.
For each medication listed:

- Note if the patient is currently taking the specified medications and select Yes/No from the dropdown 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.

Use the Del button to delete a record from the Medical History tab.

**Non-Prescription Medications**

The Non-Prescription Medications tab provides space to record any OTC/non-prescription medications the patient is taking.

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

- Note if the patient is currently taking any OTC medications and select Yes/No from the dropdown list.
- Enter the name of the medication in the Medication field.
- Enter any appropriate comments in the Comments field.

Use Del buttons to remove any OTC items.
**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.

- Note if the patient is currently taking any other medications and select **Yes/No** from the dropdown list.
- Enter the name of the medication in the **Medication** field.
- Enter any appropriate comments in the **Comments** field.

Repeat the same process for any Rx items that they have purchased from other pharmacies. Use **Del** buttons to remove any Rx items.
General Comments

The **General Comments** tab provides space to record any comments you want included on the report printout.

![General Comments Tab](image)

Pharmacist Comments

The **Pharmacist Comments** tab provides space to record any comments that the pharmacist wishes to enter concerning the medication or patient in the free form.

![Pharmacist Comments Tab](image)

7. When you are finished click **Finalize Review**.
8. The Medication Review prompt will appear. If you have Allow Editing Counseling Time enabled, enter the amount of time it took to complete the review in the Time spent field.

The Assessment Location information is pre-populated with the pharmacy information. If the Medication Review was physically conducted in another location (LTC facility, patient’s home) other than the pharmacy, enter the name of the location and the address. Complete the Other Professional Involved fields if another health professional assisted with the review.

When you are finished, click OK.
Affixing an Electronic Signature

**NOTE**: If you do not have an electronic signature configured, print the Medication Review Report, have both the patient and the pharmacist sign the report, and scan it back into the system.

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

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 Medication Review**

12. A prompt will appear asking if you want to print a paper copy of the electronic Medication Review. Click **Yes**.

13. The **Medication Review report** print form will appear. Select the appropriate print options and click **Print** and provide this copy to the patient.

**Billing a Medication Review**

14. Once printing is complete, the **Fee For Service** claim will automatically populate in the **F12** screen. If necessary, perform a doctor search to locate the pharmacist to use as the prescriber and ensure all of the other information entered on the **F12** screen is correct.

**NOTE:** If the user account of the pharmacist logged into the terminal during the processing of the Medication Review includes a license number that is identical to the license number of a Prescriber card in the Doctor file, then the Prescriber field on the **F12** screen for the claim will be populated with that prescriber.
15. Click **F12 - Fill Rx**. The claim will be transmitted to the appropriate party for payment.

**Medication Review Options**

Several Medication Review options are available from the right navigation pane on the NB PharmaCheck Medication Check-up screen.
Review

Print Medication Review
When this option is selected, the Medication Review report screen will appear, allowing you to set various print options. Configure the appropriate print options. Select Preview to view the report or Close to exit.

Select Rxs for review
If you wish to add/edit Rxs on the Medical History tab, click the button Select Rxs for review. When selected, the Medication Review Rx Selection screen will appear, allowing you to add and remove items from the Medical History tab on the Medication Review Annual Review screen. Click OK to save any changes and Cancel to close the screen.
**View Follow Ups**

When this option is selected, the *Medication Review Follow-ups* screen will appear, allowing you to create follow-up reviews for the patient.

**NOTE:** This is something that you initiate to follow up with the patient after the Medication Review has been completed. This is **NOT** a Medication Review Followup review.

To add a follow-up, click **Ins** and complete the *Medication Review Follow-up* screen. When you are finished, click **Save**.
View

**Patient Charting**

When this option is selected, the **Patient Charting** form will appear, displaying information about the patient’s weight, height, blood pressure, blood sugar, and so on.

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

![Patient Document List](image)

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

Patient Medication Reviews

When this option is selected the Patient Medication Reviews and Dialogs screen will appear, displaying a history of all reviews for the patient including any that are currently in the Medication Review queue.

![Patient Medication Reviews and Dialogs](image)

Double-click a Medication Review to view its details. Click Close to exit the screen.

Profile

The Profile menu on the Medication Review Annual Review screen is identical to the Profile menu on the patient profile. This menu allows you to view All Rxs, Active Rxs, Active Rxs w/ Passtimes, Pricing Profile, and Not Disp/OTC Profile.
Completing Medication Review ‘Saved for Later’

1. To call up Medication Reviews ‘Saved for Later’ or added to the Med Review Queue via auto prompting, do one of the following:

**Patient Card**

a) Bring up the patient card using the F3 Patient search and select Medication Review/Dialogs from the right navigation pane.
b) The Medication Reviews queue appears with all the Med Review records that are pending review.

c) Select the Medication Review record you want to complete and click F - Call Up.

**F9 - Workflow**

a) Select F9 - Workflow from the Alt-X Start screen and select Medication Reviews from the right navigation pane.
b) The Medication Review queue will appear. Select the Medication Review you want to complete and click F - Call Up.

2. Complete steps 3-8 of the Creating an Electronic Medication Review section.
Sample Electronic Medication Review Report

N8 PharmaCheck Medication Check-up

<table>
<thead>
<tr>
<th>Name of Medication</th>
<th>Strength/Dose</th>
<th>How to Take this Medication</th>
<th>Purpose</th>
<th>Comments</th>
<th>Prescriber</th>
</tr>
</thead>
<tbody>
<tr>
<td>Actonel</td>
<td>30mg - 30 tab</td>
<td>TAKE 1 TABLET ONCE DAILY</td>
<td></td>
<td></td>
<td>Dr. Test, Dec</td>
</tr>
<tr>
<td>A.C. &amp; C</td>
<td>375/8/15mg - 30 tab</td>
<td>TAKE 1 TABLET ONCE DAILY</td>
<td></td>
<td></td>
<td>Dr. Test, Dec</td>
</tr>
</tbody>
</table>

Accuracy of this list is dependent on the truthfulness and completeness of information provided by the patient and it remains at all times the patient's responsibility to advise their pharmacist of any changes to their medications. By signing this, I consent for my pharmacist to share this medication list with my other health care professionals (present and future) to enhance seamless continuity of care.

______________________________
Patient Signature

______________________________
Date

______________________________
Kroll
Viewing a Completed Medication Review

With Electronic Signatures Enabled

1. Bring up the patient card using the F3 Patient search.
2. Select Medication Review/Dialogues from the right navigation pane.
3. Highlight the completed Medication Review and click F2 - View Details.

4. The NB PharmaCheck Medication Check-up screen will appear. Click the various tabs to see the Medication Review information that has been entered.

5. Click Print to print the Medication Review, or View Signatures to view the pharmacist’s or patient’s electronic signature.

Scanned Reviews with Manual Signatures

1. Bring up the patient card using the F3 Patient search.
2. Select Medication Review/Dialogues from the right navigation pane.
3. Highlight the completed Medication Review and click F2 - View Details.
4. The **NB PharmaCheck Medication Check-up** screen will appear. The **Review** tab displays information entered on-screen during the Medication Review; the **Documents** tab displays the scanned image of the signed Medication Review. Scanned paper Medication Reviews is also viewable from Patient Documents.

![Medication Review Screen]

5. Click **Print** to print the Medication Review.
Paper Medication Reviews

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

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

Configuring the Medication Review Prompt

The system prompts for Medication Review when the option **Prompt for Medication Review** is enabled under **File > Configuration > Store > Rx > Prompting.**
When the option ‘Prompt for Medication Review’ is enabled, the system screens each patient for Medication Review eligibility every time an Rx is processed. If the patient is eligible, the user is prompted and presented with a number of options as shown below.

- **Print Report Now**: This will call up the Medication Review report so you can select the items you would like to print on the report.

- **Print Report Later**: This places a record in the Medication Review queue allowing you to print the Medication 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**: This will allow 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**: This will suppress prompting for today. The next time the patient comes in to fill an Rx, you will be prompted for the Medication 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 Medication Review is enabled.
Creating a Paper Medication Review (Manual)

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

2. Select Medication Review/Dialogs from the right navigation pane.


4. The Medication 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 Medication Review later, click Save for Later.
5. The **Medication Review Rx Selection** screen will appear. Rxs under the **Pre-Selected** tab are selected by default; Rxs on the other tabs are not. Proceed through each tab and check the Rxs you want included in the report. When you are finished, click **OK**.

![Medication Review Rx Selection](image)

6. The **Medication Review Report** form will appear. Select the appropriate print options and click **Print**. The report will generate.

7. Complete the Medication Review on the form. Sign the report and have the patient do the same.
Scanning Medication Review Reports

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

9. 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.
10. 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**.

11. 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.
12. If all Rxs 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 Medication Review

13. Once scanning is complete, the Fee For Service claim will automatically populate in the F12 screen. If necessary, perform a doctor search to locate the pharmacist to use as the prescriber and ensure all of the other information entered on the F12 screen is correct.

14. Click F12 - Fill Rx. The claim will be transmitted to the appropriate party for payment.

Completing Medication Review ‘Saved for Later’

1. To call up Medication Reviews ‘Saved for Later’, do one of the following:

Patient Card

a) Bring up the patient card using the F3 Patient search and select Medication Review/Dialogs from the right navigation pane.

b) The Medication Reviews queue will appear. Select the Medication Review record you want to complete and click F - Call Up.

F9 - Workflow

a) Select F9 - Workflow from the Alt-X Start screen and select Medication Reviews from the right navigation pane.

b) The Medication Review queue will appear. Select the Medication Review you want to complete and click F - Call Up.

2. Complete steps 4-14 of the Creating a Paper Medication Review section.
### Sample Paper Medication Review Report

![Image of NB PharmaCheck Medication Check-up]

#### Viewing a Completed Medication Review

1. Bring up the patient card using the **F3 Patient** search.
2. Select **Medication Review/Dialogs** from the right navigation pane.
3. Highlight the completed Medication Review and click **F2 - View Details.**
4. The NB PharmaCheck Medication Check-up screen will display the scanned image of the completed Medication Review. Scanned Medication Reviews are also viewable from Patient Documents.

![NB PharmaCheck Medication Check-up Screen](image)

**Declined and Refused Medication Reviews**

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

**NOTE:** The medication review records that are declined by the pharmacist or patient refused can also be noted from the Medication Review queue on the F9-Workflow screen.

**Pharmacist Declined**

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

2. Select **Medication Review/Dialogs** from the right navigation pane.
3. Select the appropriate Medication 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 Medication Review. Complete the form and click **OK**.
- If you select **Never Prompt for this patient** you will not receive any additional Medication Review prompts for the patient.

**Patient Refused**

1. Bring up the patient card using the **F3 Patient** search.
2. Select **Medication Review/Dialogs** from the right navigation pane.
3. Select the appropriate Medication 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 **Medication 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 Medication Review. Complete the form and click **OK**.
• If you select **Never Prompt for this patient** you will not receive any additional Medication Review prompts for the patient.

**NOTE:** Medication Review records that have been declined or refused cannot be deleted from the Medication Reviews queue.

## Medication Review Statuses

This section explains the statuses that appear in the **Medication Review** queue at various stages throughout the Medication Review process.

### Statuses

#### 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
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 Statuses

<table>
<thead>
<tr>
<th>Type</th>
<th>Status</th>
<th>Fee Status</th>
<th>Created</th>
<th>Completed</th>
</tr>
</thead>
<tbody>
<tr>
<td>NB PharmaCheck Medication Check-up</td>
<td>Pending</td>
<td>Review Not Completed Yet</td>
<td>10/08/2014</td>
<td></td>
</tr>
<tr>
<td>NB PharmaCheck Medication Check-up</td>
<td>Refused by Patient</td>
<td>No Fee Applicable</td>
<td>13/08/2014</td>
<td>19/08/2014</td>
</tr>
<tr>
<td>NB PharmaCheck Medication Check-up</td>
<td>Completed Electronic</td>
<td>Pending Claim</td>
<td>08/08/2014</td>
<td>06/08/2014</td>
</tr>
</tbody>
</table>

**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.