

Auto Fill Functionality



Contents

| | |
|---|----------|
| Configuration..... | 1 |
| Creating Refill and Autofill Reminders | 1 |
| Enabling Message Types and Escalations | 2 |
| Enabling Communication Types..... | 3 |
| Setting Prompting Options..... | 4 |
| Enrolling Patients in the Refill Reminder Program..... | 5 |
| Enrolling from the F12 - Fill Rx Screen | 5 |
| Enrolling While Filling an Rx | 7 |
| Flagging an Rx for Refill Reminders | 8 |
| Viewing the Outbound Communication Queue..... | 9 |

Auto Fill Functionality

Auto Fill functionality in Kroll integrates with existing pharmacy IVR systems and vendors to carry out automatic refill reminder notifications for designated patients. This feature increases patient compliance, customer satisfaction, and pharmacy productivity.

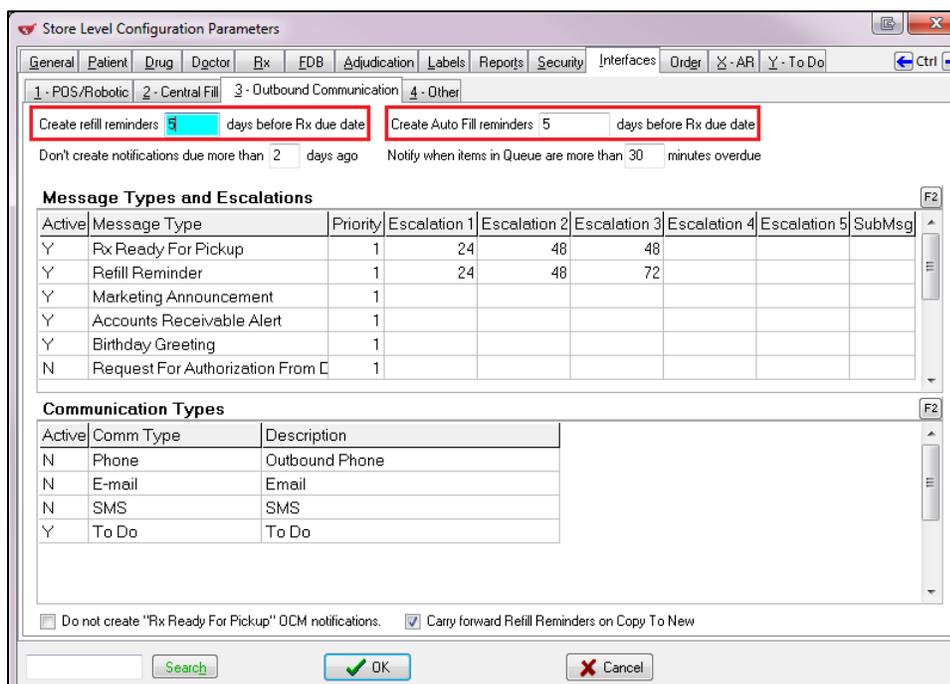
Configuration

The following section outlines the configuration parameters that must be in place to use Auto Fill functionality in Kroll.

Creating Refill and Autofill Reminders

Refill reminders are sent to patients prior to the date of refill. This gives patients time to respond and ensure proper compliancy. Auto Fill reminders notify pharmacy users that an Rx is to be refilled by placing the Rx in the To Do queue.

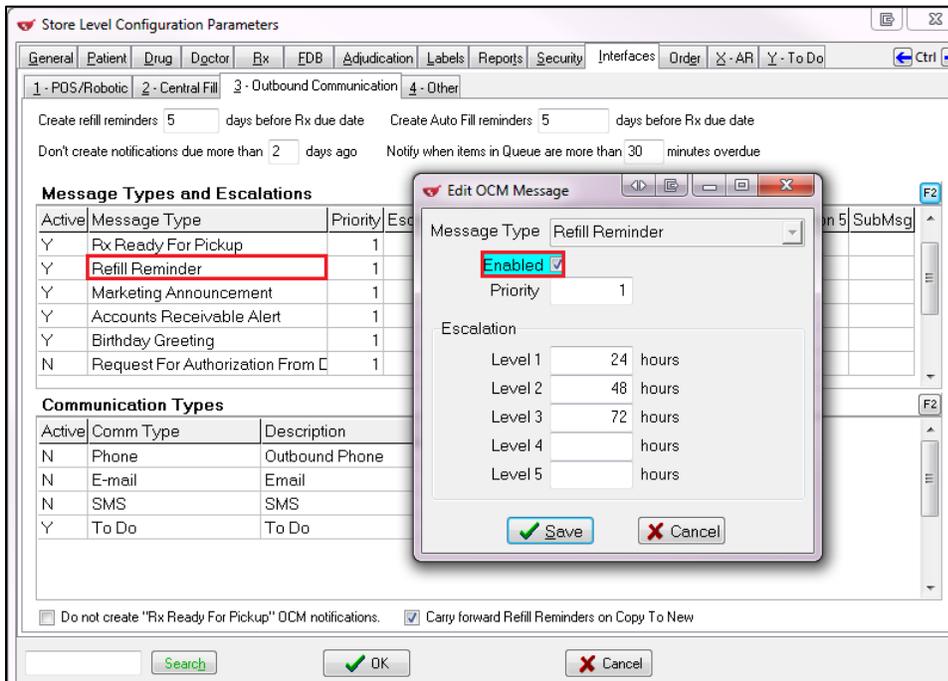
1. Go to **File > Configuration > Store > Interfaces > Outbound Communication** and set the refill reminder date in the **Create refill reminders [x] days before Rx due date** field and the Autofill reminder date in the **Create refill reminders [x] days before Rx due date** field.



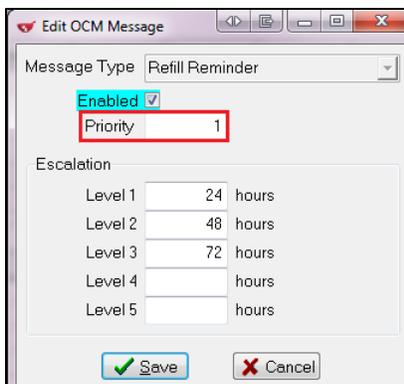
Enabling Message Types and Escalations

Message types indicate the types of communications enabled in the system. Supported message types will vary from vendor to vendor.

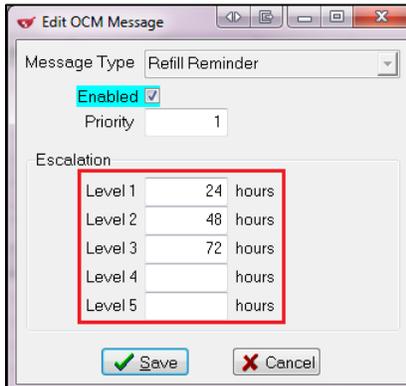
1. Double-click **Refill Reminder** in the **Message Types and Escalations** list. The **Edit OCM Message** form will appear. Ensure the **Enabled** checkbox is checked.



2. Set the **Priority** level you want to assign refill reminders. This will indicate to the IVR or third party system the order in which messages should be processed. Any numerical value can be entered; '1' is the highest priority.



3. Set the **Escalation** levels you want to assign refill reminders. **Level 1** is the number of hours that will elapse before the patient is contacted a second time, **Level 2** is the number of hours that will elapse before the patient is contacted a third time, and so on. When you are finished, click **Save**.



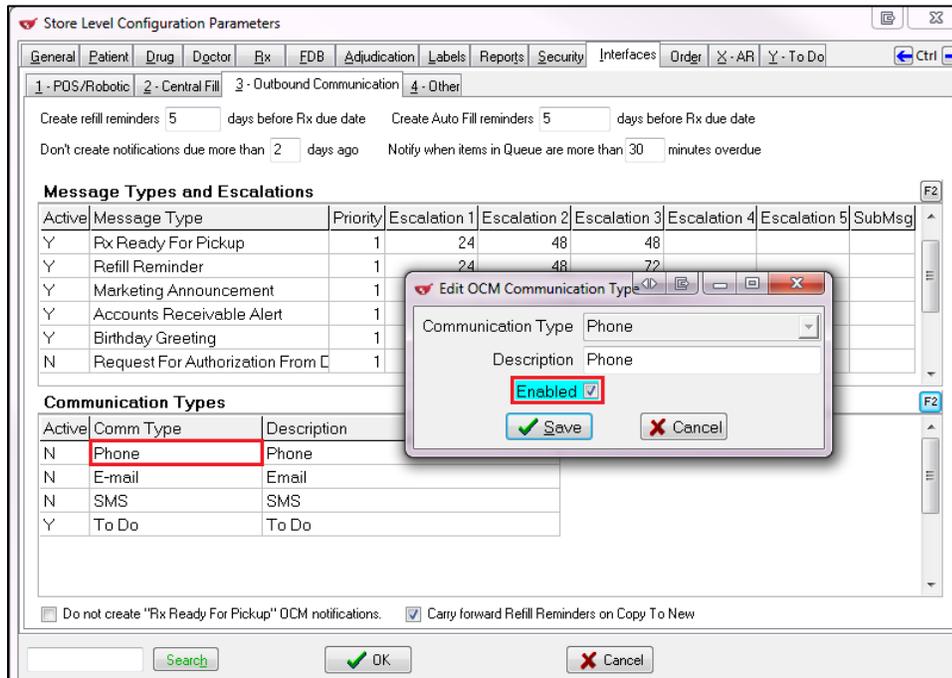
| Level | Hours |
|---------|----------|
| Level 1 | 24 hours |
| Level 2 | 48 hours |
| Level 3 | 72 hours |
| Level 4 | hours |
| Level 5 | hours |

Enabling Communication Types

Communication types are methods of communication that are used to contact patients. Support for communication types will vary from vendor to vendor. The available communication types include:

- **Phone:** A phone call will be made by an Interactive Voice Response system;
- **E-mail:** Communication will be sent via e-mail;
- **SMS:** Recipients will receive a text message reminder on their cellular device;
- **To Do:** Prescriptions marked as Auto Refill will appear in the To Do module;

1. Ensure the necessary **Communication Types** are enabled. To enable a communication type, double-click the entry. The **Edit OCM Communication Type** window will appear. Click the **Enabled** checkbox. When you are finished, click **Save**.



Setting Prompting Options

There are a couple of additional options that can be set in store-level configuration. To access and enable these options, go to **File > Configuration > Store > Y - To Do**.

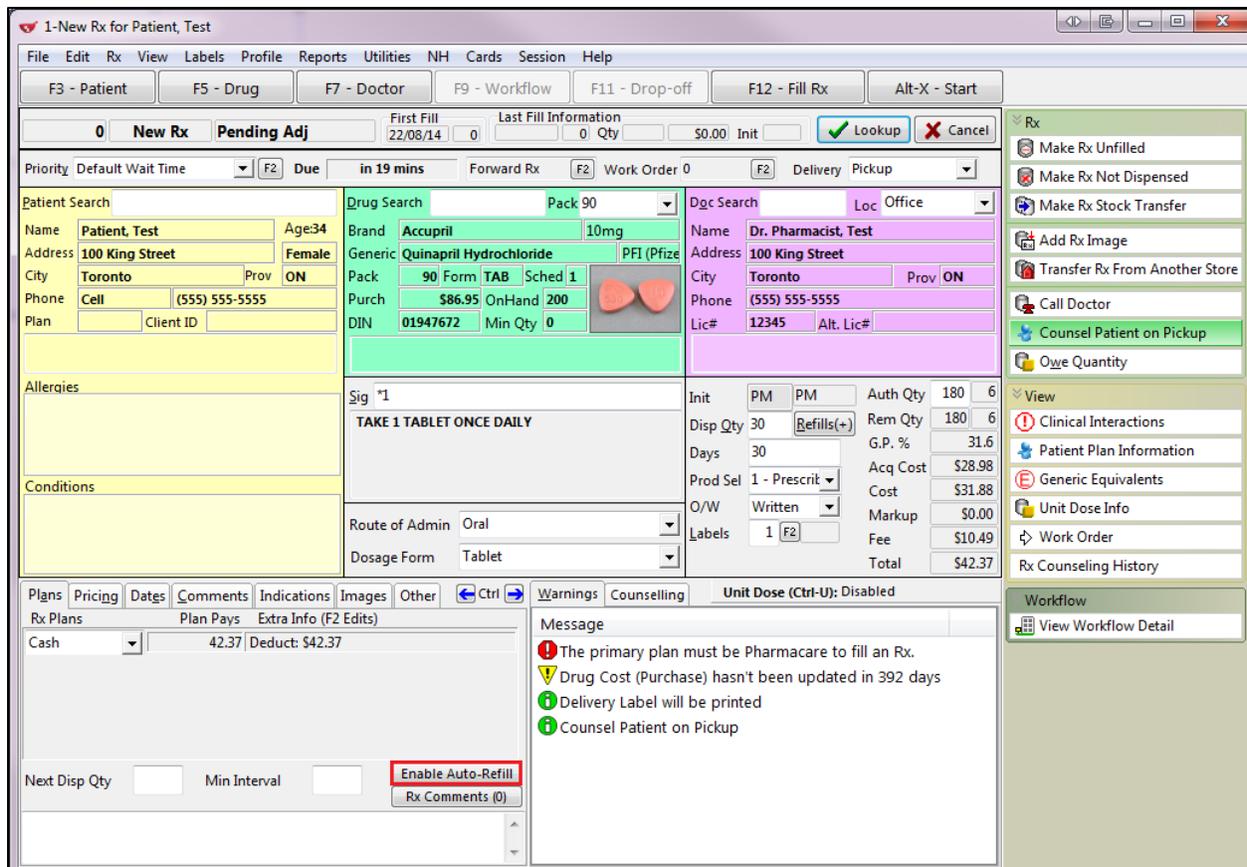
- **Prompt for refill mode when refilling from pat profile:** When enabled, you will be prompted to enroll the patient in Autofill when refilling an Rx from the patient profile;
- **Confirm Patient Profile Refills If In Drop Off Screen:** When enabled, you will be prompted to confirm the patient's Refill Reminder enrolment in the Drop Off screen.

Enrolling Patients in the Refill Reminder Program

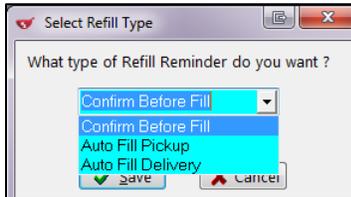
The following section outlines the process of enabling Auto Refills. In order to generate a refill reminder, the patients must have refills and should have enrolled in Outbound Communications.

Enrolling from the F12 - Fill Rx Screen

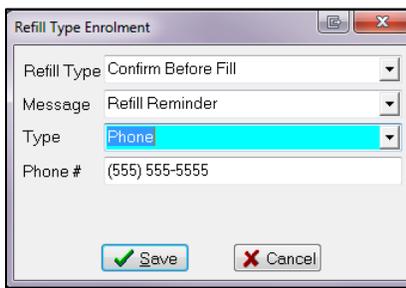
1. Locate a patient and access the **F12 - Fill Rx** screen.
2. Click the **Enable Auto-Refill** button.



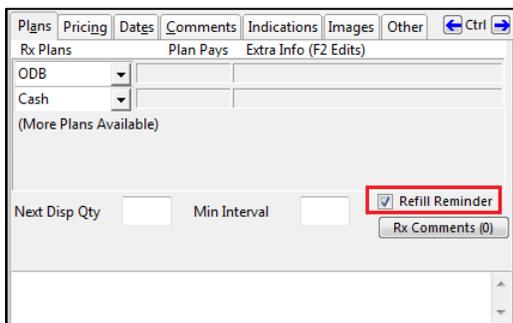
3. Select the appropriate type of refill reminder from the **Select Refill Type** dropdown menu and click **Save**.



4. If you selected **Confirm Before Fill** from the **Select Refill Type** dropdown menu, you will be prompted to complete the **Refill Type Enrolment** form. Make the appropriate selections from the **Message** and **Type** dropdown menus. The patient's contact information will auto-populate according to your **Type** selection. When you are finished, click **Save**.

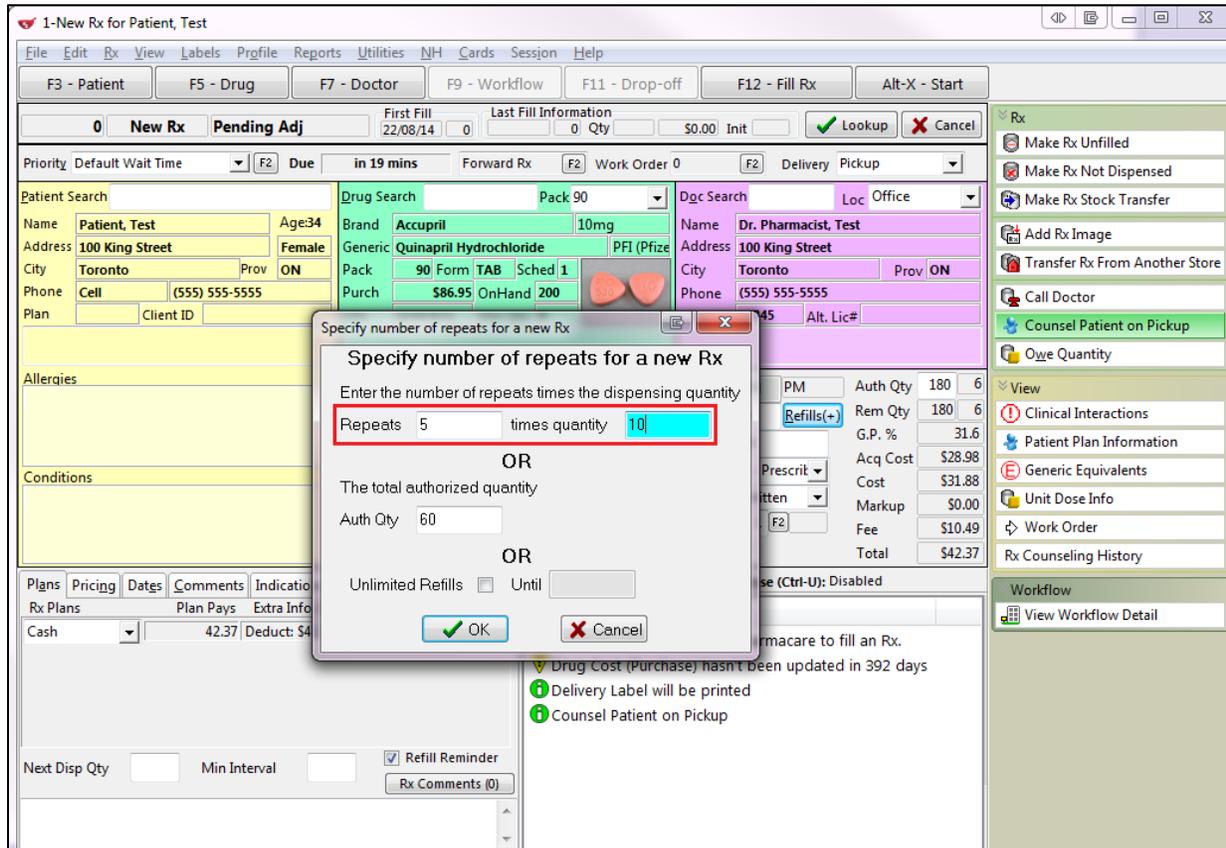


5. The **F12 - Fill Rx Screen** will show an enabled **Refill Reminder** checkbox where the **Enable Auto-Refill** button was.



Enrolling While Filling an Rx

1. Access the **New Rx** card and begin filling an Rx. Click the **Refills(+)** button to enter the number of repeats and the dispensing quantity that applies to the Rx. The **Auth Qty** field will auto-populate according to the information you enter. Click **OK**.



2. Click the **Fill Rx** button. A prompt asking **'Does the patient want to enroll in Refill Reminder or Auto Refill program?'** will appear. Click **Yes**.



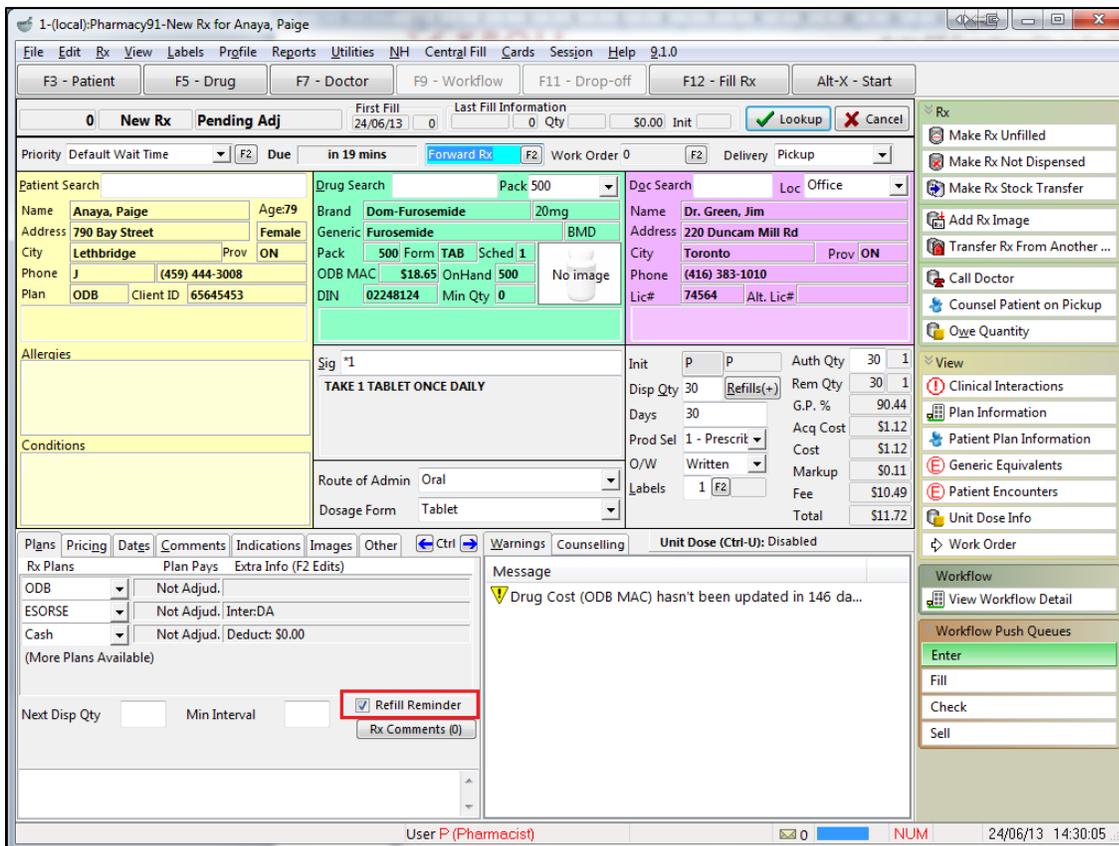
3. Configure the enrolment according to the patient's preferences. Click **Save**.



Flagging an Rx for Refill Reminders

In order for a refill reminder to be generated, the Rx must have refills and the patient must be enrolled in the Refill Reminder program.

1. Locate a patient and access the **F12 - Fill Rx** screen.
2. Place a checkmark next to **Refill Reminder**.



1-(local):Pharmacy91-New Rx for Anaya, Paige

File Edit Rx View Labels Profile Reports Utilities NH Central Fill Cards Session Help 9.1.0

F3 - Patient F5 - Drug F7 - Doctor F9 - Workflow F11 - Drop-off F12 - Fill Rx Alt-X - Start

0 New Rx Pending Adj First Fill 24/06/13 0 Last Fill Information 0 Qty \$0.00 Init Lookup Cancel

Priority Default Wait Time F2 Due in 19 mins Forward Rx F2 Work Order 0 F2 Delivery Pickup

Patient Search Drug Search Pack 500 Dgc Search Loc Office

Name Anaya, Paige Age:79 Brand Dom-Furosemide 20mg Name Dr. Green, Jim
 Address 790 Bay Street Generic Furosemide BMD Address 220 Duncam Mill Rd
 City Lethbridge Prov ON Pack 500 Form TAB Sched 1 City Toronto Prov ON
 Phone J (459) 444-3008 ODB MAC \$18.65 OnHand 500 No image Phone (416) 383-1010
 Plan ODB Client ID 65645453 DIN 02248124 Min Qty 0 Lic# 74564 Alt. Lic#

Allergies Sig '1
 TAKE 1 TABLET ONCE DAILY
 Route of Admin Oral
 Dosage Form Tablet

Init P P Auth Qty 30 1
 Disp Qty 30 Refills(+) Rem Qty 30 1
 Days 30 G.P. % 90.44
 Prod Sel 1 - Prescrit Acq Cost \$1.12
 O/W Written Cost \$1.12
 Labels 1 F2 Markup \$0.11
 Fee \$10.49
 Total \$11.72

Plans Pricing Dates Comments Indications Images Other Refill Reminder
 Rx Plans Plan Pays Extra Info (F2 Edits)
 ODB Not Adjud.
 ESORSE Not Adjud. Inter:DA
 Cash Not Adjud. Deduct: \$0.00
 (More Plans Available)

Next Disp Qty Min Interval Rx Comments (0)

Warnings Counselling Unit Dose (Ctrl-U): Disabled
 Message
 ⚠ Drug Cost (ODB MAC) hasn't been updated in 146 da...

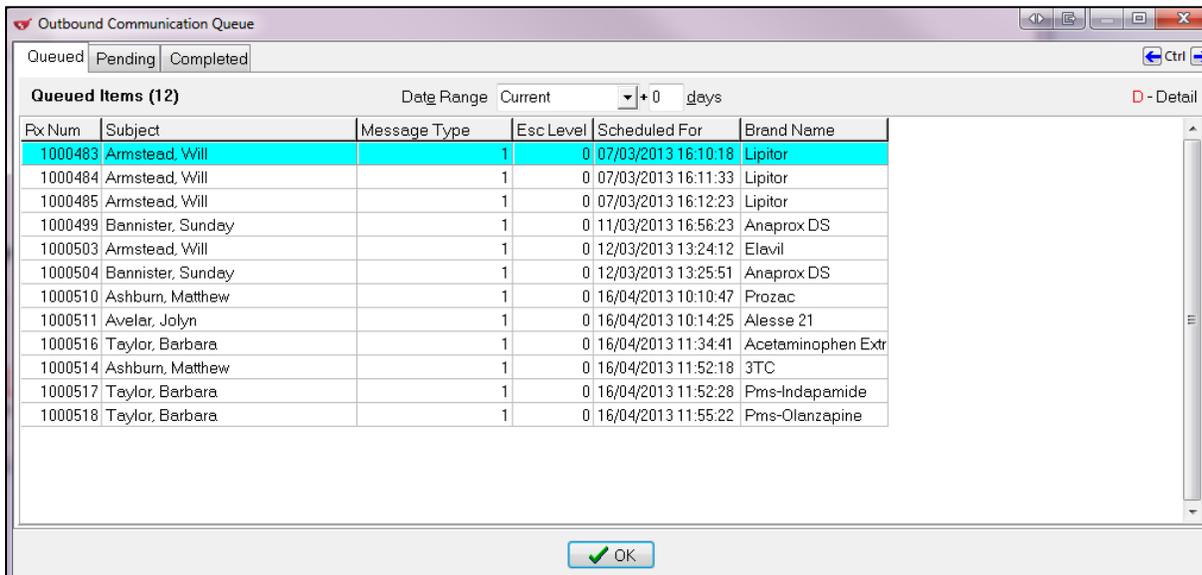
User P (Pharmacist) 0 NUM 24/06/13 14:30:05

Rx
 Make Rx Unfilled
 Make Rx Not Dispensed
 Make Rx Stock Transfer
 Add Rx Image
 Transfer Rx From Another ...
 Call Doctor
 Counsel Patient on Pickup
 Owe Quantity
 View
 Clinical Interactions
 Plan Information
 Patient Plan Information
 Generic Equivalents
 Patient Encounters
 Unit Dose Info
 Work Order
 Workflow
 View Workflow Detail
 Workflow Push Queues
 Enter
 Fill
 Check
 Sell

Viewing the Outbound Communication Queue

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

1. From the Start screen, go to **Utilities > Outbound Communications > View Queue**. The **Outbound Communication Queue** window will open.

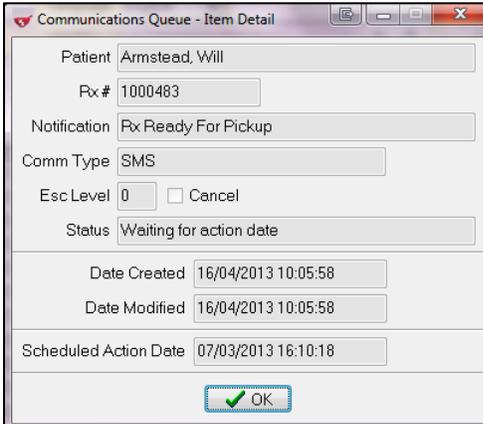


The screenshot shows a window titled "Outbound Communication Queue" with three tabs: "Queued", "Pending", and "Completed". The "Queued" tab is selected. Below the tabs, there is a "Queued Items (12)" section with a "Date Range" set to "Current" and "+ 0 days". A table lists 12 items with columns for Rx Num, Subject, Message Type, Esc Level, Scheduled For, and Brand Name. The first row is highlighted in blue.

| Rx Num | Subject | Message Type | Esc Level | Scheduled For | Brand Name |
|---------|-------------------|--------------|-----------|---------------------|--------------------|
| 1000483 | Armstead, Will | | 1 | 07/03/2013 16:10:18 | Lipitor |
| 1000484 | Armstead, Will | | 1 | 07/03/2013 16:11:33 | Lipitor |
| 1000485 | Armstead, Will | | 1 | 07/03/2013 16:12:23 | Lipitor |
| 1000499 | Bannister, Sunday | | 1 | 07/03/2013 16:56:23 | Anaprox DS |
| 1000503 | Armstead, Will | | 1 | 12/03/2013 13:24:12 | Elavil |
| 1000504 | Bannister, Sunday | | 1 | 12/03/2013 13:25:51 | Anaprox DS |
| 1000510 | Ashburn, Matthew | | 1 | 16/04/2013 10:10:47 | Prozac |
| 1000511 | Avelar, Jolyn | | 1 | 16/04/2013 10:14:25 | Alesse 21 |
| 1000516 | Taylor, Barbara | | 1 | 16/04/2013 11:34:41 | Acetaminophen Extr |
| 1000514 | Ashburn, Matthew | | 1 | 16/04/2013 11:52:18 | 3TC |
| 1000517 | Taylor, Barbara | | 1 | 16/04/2013 11:52:28 | Pms-Indapamide |
| 1000518 | Taylor, Barbara | | 1 | 16/04/2013 11:55:22 | Pms-Olanzapine |

- **Queued** tab: Displays communications that have not yet been pushed to the IVR/third party system.
- **Pending** tab: Displays communications that have been pushed to the IVR/third party system, but have not yet been delivery to the recipient and/or no response from the recipient has been received.
- **Completed** tab: Displays communications that have been sent to the IVR/third party system and have resulted in either a successful transmission or an error.

2. Double click an item from the **Queued Items** list to view the details of the selected item.
Click **OK** to close the **Communications Queue - Item Detail** window.



| | |
|-----------------------|-----------------------------------|
| Patient | Armstead, Will |
| Rx # | 1000483 |
| Notification | Rx Ready For Pickup |
| Comm Type | SMS |
| Esc Level | 0 <input type="checkbox"/> Cancel |
| Status | Waiting for action date |
| Date Created | 16/04/2013 10:05:58 |
| Date Modified | 16/04/2013 10:05:58 |
| Scheduled Action Date | 07/03/2013 16:10:18 |