

# Compliance Packaging

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# Compliance Packaging

This user guide explains how to set up compliance packaging (i.e., unit dosing) in Kroll. Compliance packaging is available for both retail and nursing home patients.

## Retail

This section outlines how to set up compliance packaging for retail pharmacies. It explains how to set up patient price groups, how to configure patients for compliance packaging, and how to fill unit dose Rx's.

### Setting up Patient Price Groups

1. From the **Alt-X Start** screen, go to **Edit > Plans/Pricing**.
2. The **Plans/Pricing Configuration** screen will appear. Select the **Pat Price Groups** tab and click **Ins**.

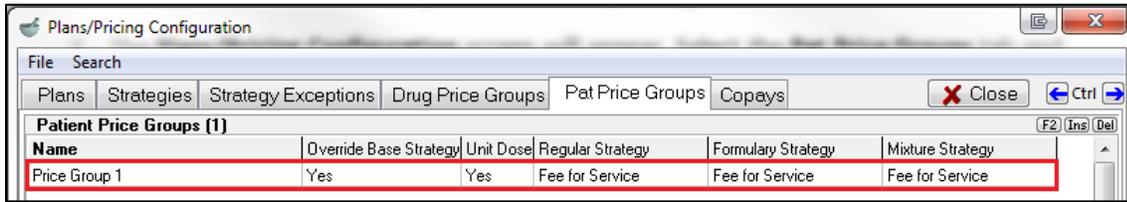


3. Complete the **Patient Price Group Edit Form**, ensuring the **Is Unit-Dose Patient Price Group** flag is enabled. Click **Save**.

The screenshot shows a window titled "Patient Price Group Edit Form". It contains the following fields and controls:

- "Patient Price Group Name" text box with "Price Group 1" entered.
- "Override the Plan/Drug Group Strategy" checkbox, which is checked.
- "Is Unit-Dose Patient Price Group" checkbox, which is checked.
- "Corporate ID" text box with "99999999" entered.
- "Pricing Strategies" section with a button labeled "Advanced Configuration".
- Three rows of pricing strategies, each with a dropdown menu and an "Edit" button:
  - Regular Drugs: Fee for Service
  - Formulary Drugs: Fee for Service
  - Mixtures: Fee for Service
- At the bottom, there are two buttons: "Save" (with a green checkmark icon) and "Cancel" (with a red X icon).

The price group will be added to the patient price groups list on the **Plans/Pricing Configuration** screen.

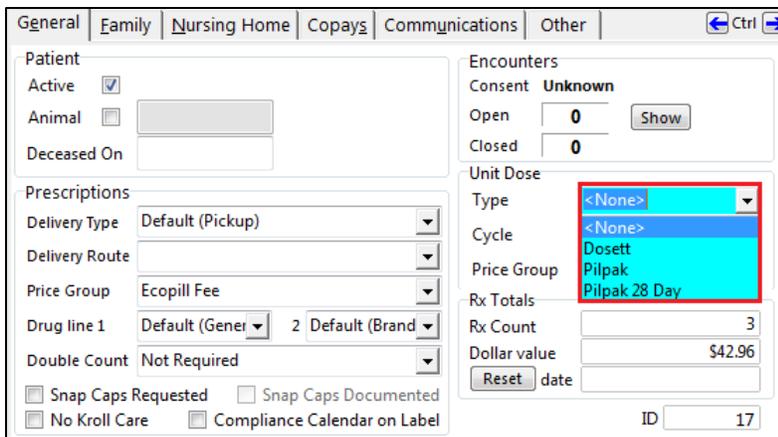


- Repeat steps 2-3 for each price group you want included in the patient price groups list.
- Click **Close** to exit the **Plans/Pricing Configuration** screen.

## Configuring Patients for Compliance Packaging

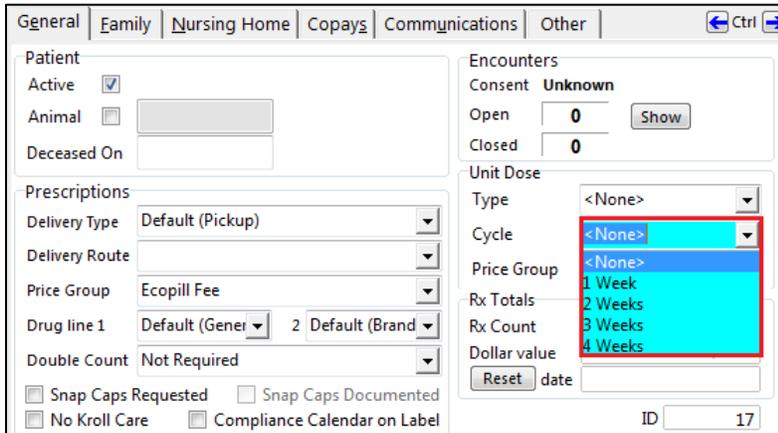
The following patient profile configuration settings are optional; they are not required in order for compliance labels to print.

- Call up the patient record for the selected patient.
- Navigate to the **General** tab and select the appropriate unit dose packaging type from the **Type** dropdown menu.



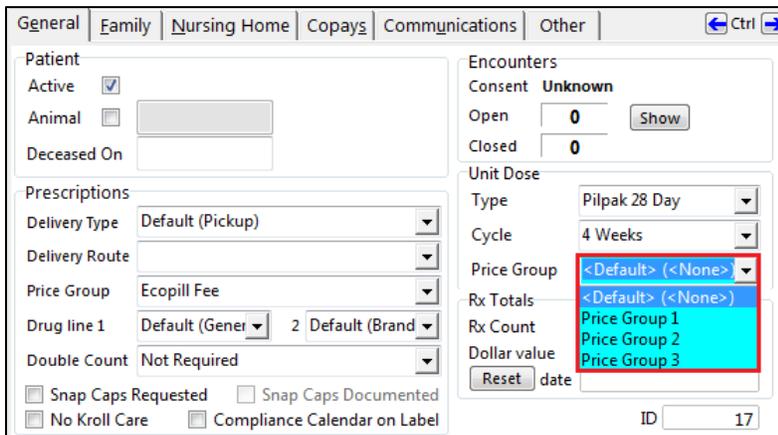
**NOTE:** When a unit dose type is set on the patient profile, the system will automatically prompt you to enroll Rx's filled for that patient into unit dosing.

3. Select the appropriate unit dose cycle from the **Cycle** dropdown menu. This will indicate the number of weeks that will elapse before the pharmacy refills the patient's medication.



The screenshot shows a software window with tabs: General, Family, Nursing Home, Copays, Communications, Other. The 'Unit Dose' section is active, showing a dropdown menu for 'Cycle' with options: <None>, 1 Week, 2 Weeks, 3 Weeks, 4 Weeks. Other fields include 'Type' (set to <None>), 'Price Group' (set to <None>), 'Rx Totals', 'Rx Count', 'Dollar value', and 'Reset' button. The 'Patient' section has 'Active' checked, 'Animal' unchecked, and 'Deceased On' empty. The 'Encounters' section shows 'Consent' as 'Unknown', 'Open' as 0, and 'Closed' as 0. The 'Prescriptions' section has 'Delivery Type' as 'Default (Pickup)', 'Delivery Route' empty, 'Price Group' as 'Ecopill Fee', and 'Drug line 1' as 'Default (Gener)' and '2 Default (Brand)'. The 'Double Count' is 'Not Required'. There are checkboxes for 'Snap Caps Requested', 'Snap Caps Documented', 'No Kroll Care', and 'Compliance Calendar on Label'. The 'ID' field contains '17'.

4. Select the appropriate price group from the **Price Group** dropdown menu.



The screenshot shows the same software window as above. The 'Price Group' dropdown menu is open, showing options: <Default> (<None>), Price Group 1, Price Group 2, Price Group 3. The 'Unit Dose' section now shows 'Type' as 'Pilpak 28 Day' and 'Cycle' as '4 Weeks'. The 'Price Group' field is highlighted in blue. The 'Rx Totals' dropdown is also open, showing options: <Default> (<None>), Price Group 1, Price Group 2, Price Group 3. The 'Reset' button is visible. The 'Patient' and 'Encounters' sections remain the same. The 'Prescriptions' section is also the same. The 'Double Count' is 'Not Required'. There are checkboxes for 'Snap Caps Requested', 'Snap Caps Documented', 'No Kroll Care', and 'Compliance Calendar on Label'. The 'ID' field contains '17'.

## Filling Unit Dose Rx's

1. Begin filling an Rx, keeping in mind the unit dose cycle set on the patient card. When all the Rx information has been entered, select **Unit Dose Info** from the right navigation pane.

The screenshot shows the main application window with various tabs and fields. The right-hand navigation pane is open, and the 'Unit Dose Info' option is highlighted with a red box.

2. The **Rx Information** screen will appear. Complete the following:

- Ensure the **Unit Dose** flag is enabled
- Select dosing frequency from the **Frequency** dropdown menu
- Enter a **Card Number**
- Complete the unit dose chart

The 'Rx Information' dialog box is shown with the following details:

- Rx Start Date: 15/05/2014
- Drug: TAB Drospirenone/Estradiol 1/1 mg
- Rx Stop Date: [Empty]
- Sig: TAKE 1 TABLET ONCE DAILY
- Unit Dose
- Frequency: Daily
- Card Number: 1

Below the dialog box is a unit dose chart with the following data:

	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28
Breakfast	1																											
Lunch	1																											
Dinner	1																											
Bedtime	1																											

**NOTE:** Each card can only hold a certain number of medications, depending on the compliance packaging you use; therefore, you may wish to manually allocate which medication you would like to print on which card of pilpak. If you do not manually allocate the specific card number for the medication to be contained in, Kroll will default the **Card Number** field to '1'.

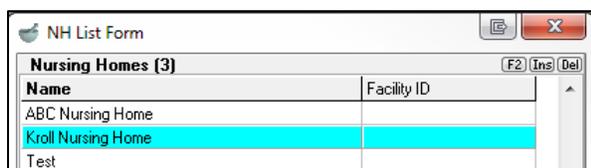
3. Click **OK** to close the **Rx Information** screen.

## Nursing Homes

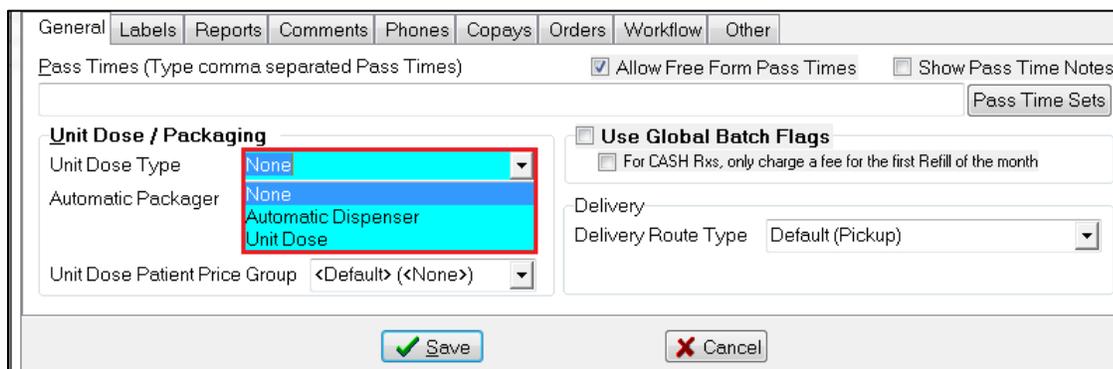
This section outlines how to set up compliance packaging for nursing homes. It explains how to set up nursing homes and how to fill unit dose Rx's.

### Setting up Nursing Homes

1. From the **Alt-X Start** screen, go to **NH > Edit Nursing Home List**.
2. The **NH List Form** screen will appear. Double-click the nursing home you want to set up compliance packaging for.



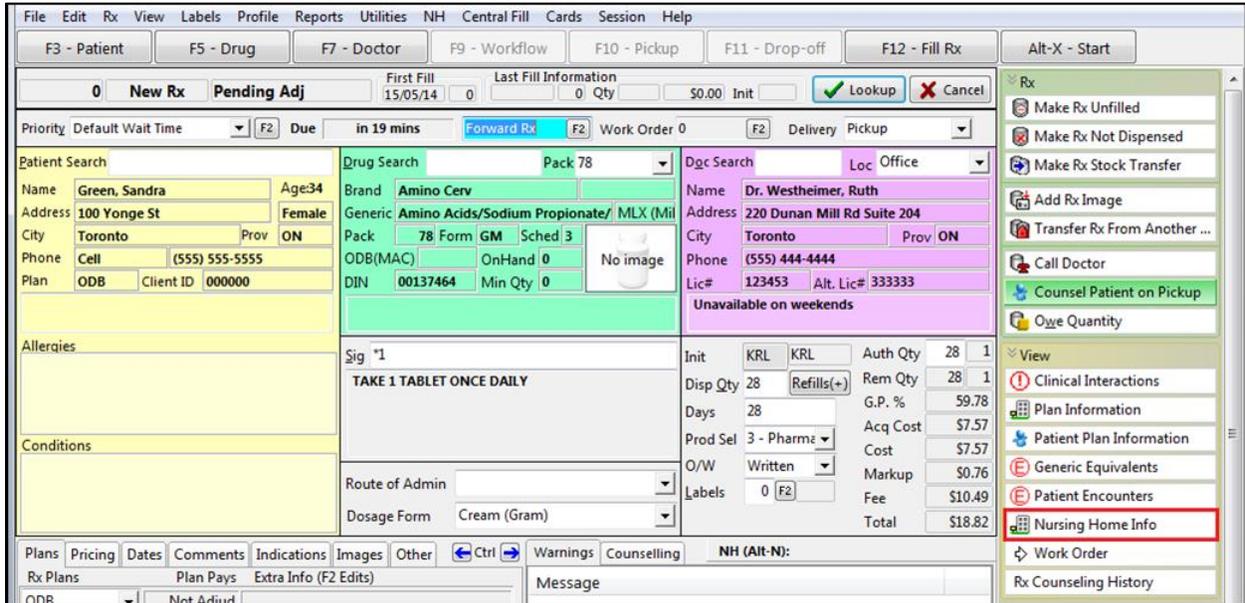
3. The **Nursing Home Form** will appear. Navigate to the **General** tab and select a **Unit Dose Type** from the dropdown menu. If your pharmacy uses a packaging machine such as AutoMed, select **Automatic Packager**; otherwise, select **Unit Dose**.



**NOTE:** The selected unit dose type will apply to all patients in the nursing home; no patient-level set up is required.

## Filling Unit Dose Rxs

1. Begin filling an Rx. When all the Rx information has been entered, select **Nursing Home Info** from the right navigation pane.



The screenshot displays a pharmacy management software interface. The main window is titled 'New Rx' and contains the following information:

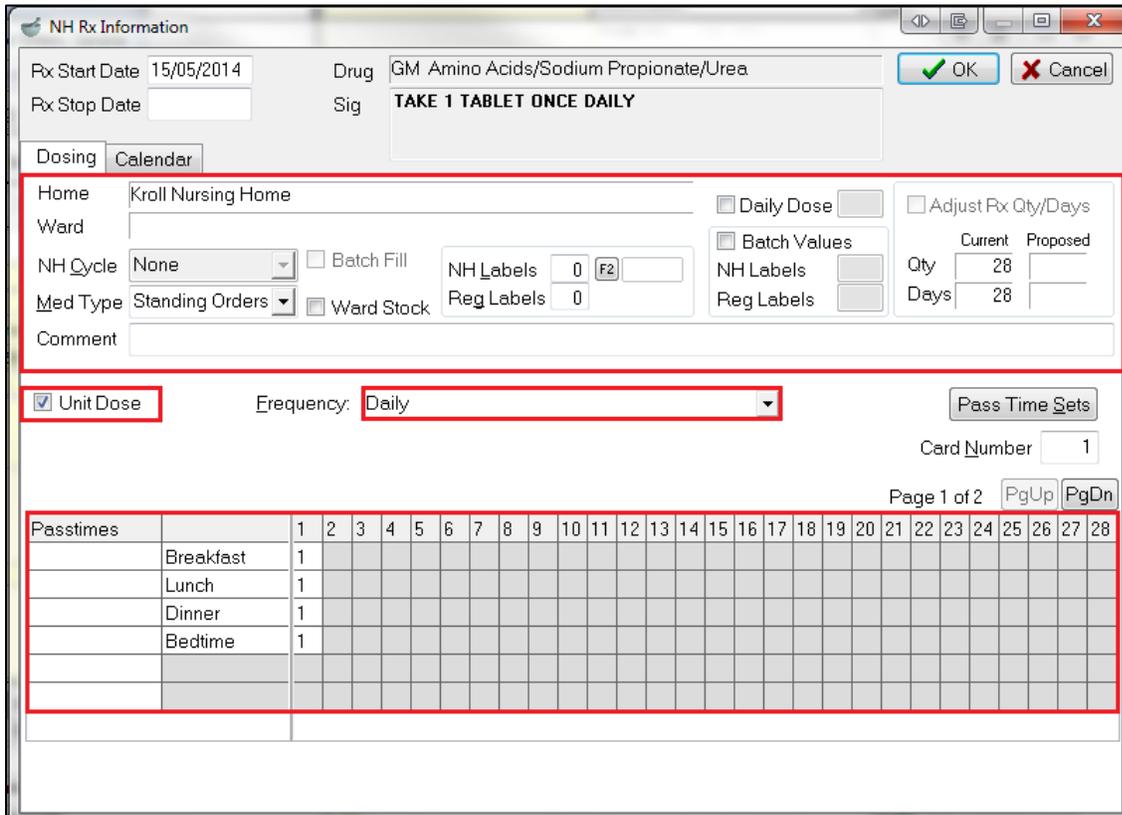
- File Edit Rx View Labels Profile Reports Utilities NH Central Fill Cards Session Help**
- Buttons:** F3 - Patient, F5 - Drug, F7 - Doctor, F9 - Workflow, F10 - Pickup, F11 - Drop-off, F12 - Fill Rx, Alt-X - Start
- Form Fields:**
  - Priority: 0, Default Wait Time: F2, Due: in 19 mins, Forward Rx: F2, Work Order: 0, Delivery: Pickup
  - Patient Search:** Name: Green, Sandra, Age: 34, Address: 100 Yonge St, City: Toronto, Prov: ON, Phone: (555) 555-5555, Plan: ODB, Client ID: 000000
  - Drug Search:** Brand: Amino Cerv, Generic: Amino Acids/Sodium Propionate/ MLX (Mil), Pack: 78 Form GM Sched 3, ODB(MAC): 00137464, OnHand: 0, Min Qty: 0
  - Dgc Search:** Name: Dr. Westheimer, Ruth, Address: 220 Dunan Mill Rd Suite 204, City: Toronto, Prov: ON, Phone: (555) 444-4444, Lic#: 123453, Alt. Lic#: 333333
  - Instructions:** Sig: \*1, TAKE 1 TABLET ONCE DAILY, Route of Admin: [Dropdown], Dosage Form: Cream (Gram)
  - Costs:** Init: KRL, KRL, Auth Qty: 28, 1, Disp Qty: 28, Refills(+), Rem Qty: 28, 1, Days: 28, G.P. %: 59.78, Prod Sel: 3 - Pharmz, Acq Cost: \$7.57, O/W: Written, Cost: \$7.57, Labels: 0, F2, Markup: \$0.76, Fee: \$10.49, Total: \$18.82

The right-hand navigation pane is expanded to show the following options:

- 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
  - Nursing Home Info** (highlighted with a red box)
  - Work Order
  - Rx Counseling History

2. The **NH Rx Information** screen will appear. Complete the following:

- Ensure the **Unit Dose** flag is enabled
- Enter any dosing information that pertains to the Rx
- Select a dosing **Frequency** from the dropdown menu
- Complete the dosing chart



**NH Rx Information**

Rx Start Date: 15/05/2014      Drug: GM Amino Acids/Sodium Propionate/Urea     

Rx Stop Date:      Sig: TAKE 1 TABLET ONCE DAILY

**Dosing** | **Calendar**

Home: Kroll Nursing Home       Daily Dose       Adjust Rx Qty/Days

Ward:       Batch Fill       Batch Values      Current      Proposed

NH Cycle: None      NH Labels: 0      F2      NH Labels:      Qty: 28

Med Type: Standing Orders       Ward Stock      Reg Labels: 0      Reg Labels:      Days: 28

Comment:

**Unit Dose**      Frequency: **Daily**     

Card Number: 1

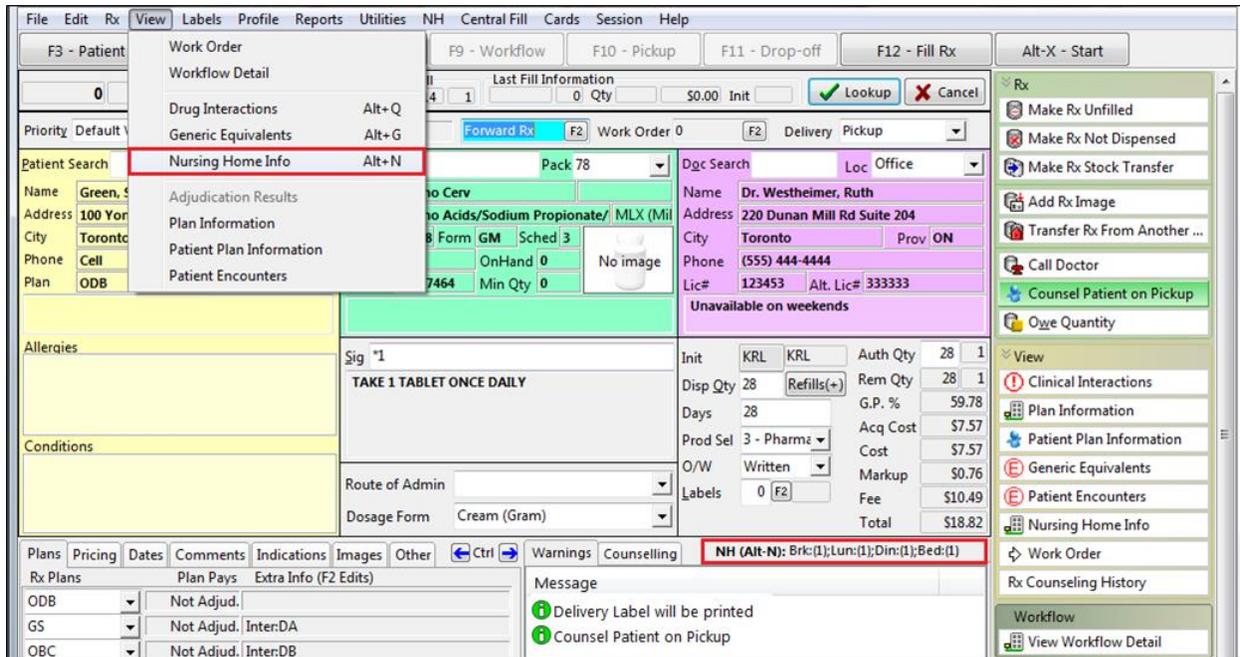
Page 1 of 2     

Passtimes	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28
Breakfast	1																											
Lunch	1																											
Dinner	1																											
Bedtime	1																											

**NOTE:** Each card can only hold a certain number of medications, depending on the compliance packaging you use; therefore, you may wish to manually allocate which medication you would like to print on which card of pilpak. If you do not manually allocate the specific card number for the medication to be contained in, Kroll will default the **Card Number** field to '1'.

3. Click **OK** to close the **NH Rx Information** form.

You can view the **NH Rx Information** form again at any time by accessing **View > Nursing Home Info**, or by clicking **NH (Alt+N)**, located beside the **Counseling** tab.



## Compliance Label Report

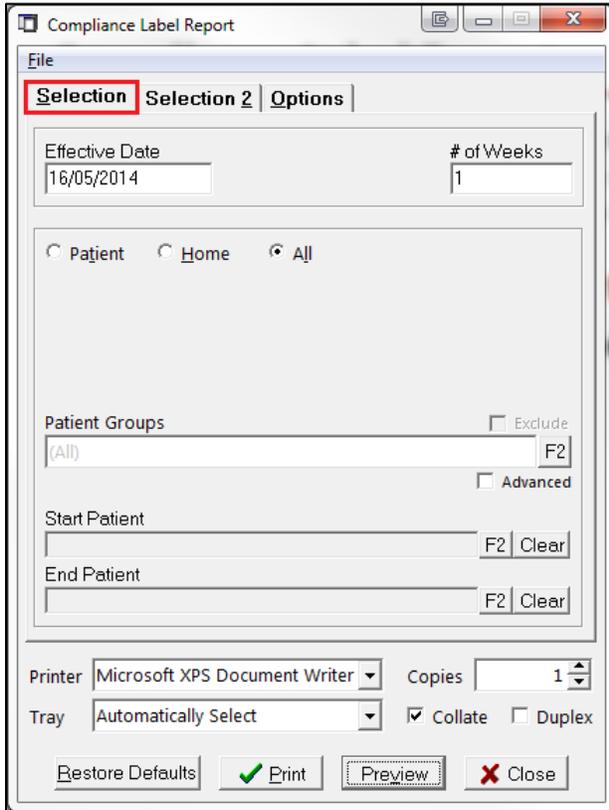
Once all prescriptions to be packaged have been processed, the Compliance Label Report can be run. Depending on the supplier you ordered the reports from the labels may have a sticky backing that allows the labels to be stuck to the card or pilpak after printing.

### Running the Compliance Label Report

1. From the **Alt-X Start** screen, go to **Reports > Patient > Compliance Label**.
2. The **Compliance Label Report** form will appear. Complete the form and click **Print** to print the report, **Preview** to preview the report, or **Close** to exit the report form.

## Selection Tab

The **Selection** tab allows you to select which patient or group of patients you want to generate the report for. It also lets you choose how many weeks to print at a time. The **Effective Date** is the date the patient(s) starts the compliance pack.

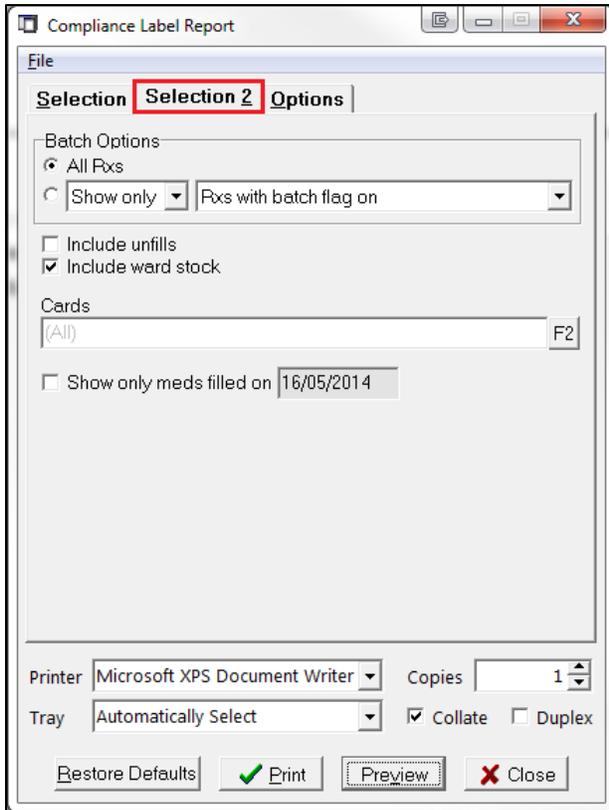


The screenshot shows the 'Compliance Label Report' window with the 'Selection' tab active. The 'Effective Date' is set to 16/05/2014 and the '# of Weeks' is 1. The 'Patient' selection is set to 'All'. The 'Patient Groups' list contains '(All)'. The 'Start Patient' and 'End Patient' fields are empty. The printer is set to 'Microsoft XPS Document Writer' with 1 copy. The tray is set to 'Automatically Select' with 'Collate' checked and 'Duplex' unchecked. Buttons for 'Restore Defaults', 'Print', 'Preview', and 'Close' are visible at the bottom.

Field	Value
Effective Date	16/05/2014
# of Weeks	1
Patient Selection	All
Patient Groups	(All)
Start Patient	
End Patient	
Printer	Microsoft XPS Document Writer
Copies	1
Tray	Automatically Select
Collate	Checked
Duplex	Unchecked

## Selection 2 Tab

The **Selection 2** tab allows you to select the types of prescriptions to include on the label. You can select certain card to print, prescriptions for a specific date, or prescriptions that are in a batch or that have the batch flag enabled. This tab also allows you to include unfills and ward stock prescriptions.



The screenshot shows the "Compliance Label Report" dialog box with the "Selection 2" tab selected. The dialog is divided into several sections:

- Batch Options:** Includes radio buttons for "All Pxs" (selected) and "Show only" (with a dropdown menu set to "Pxs with batch flag on").
- Include unfills:** A checkbox that is unchecked.
- Include ward stock:** A checked checkbox.
- Cards:** A dropdown menu set to "(All)" with a keyboard shortcut "F2" to its right.
- Show only meds filled on:** A checkbox that is unchecked, followed by a date input field containing "16/05/2014".
- Printer:** A dropdown menu set to "Microsoft XPS Document Writer".
- Copies:** A numeric spinner set to "1".
- Tray:** A dropdown menu set to "Automatically Select".
- Collate:** A checked checkbox.
- Duplex:** An unchecked checkbox.
- Buttons:** "Restore Defaults", "Print" (with a green checkmark icon), "Preview" (with a dotted border), and "Close" (with a red X icon).

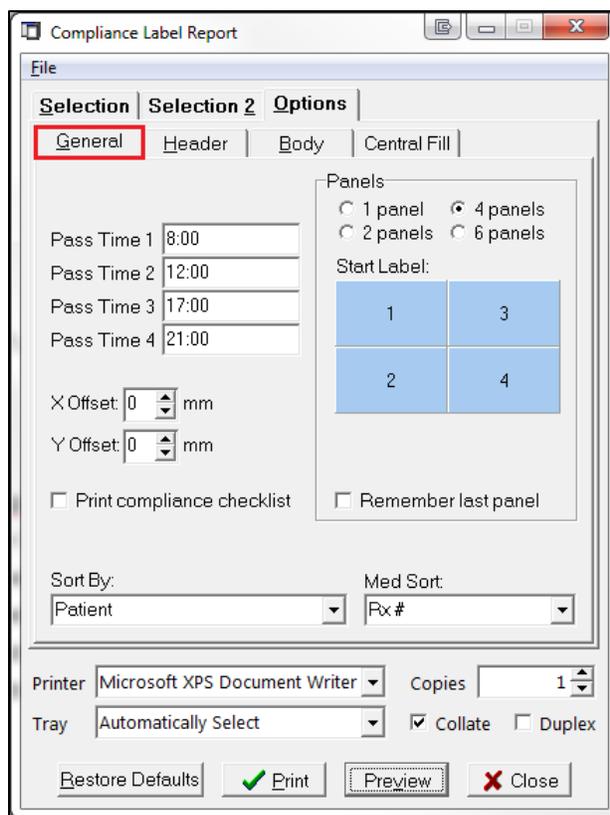
## Options Tab

The **Options** tab contains four different sections of options: **General**, **Header**, **Body**, and **Central Fill**.

### General Tab

The **General** tab allows you to assign or name the passtimes for the four timeslots as you require. You can also select the type of compliance label you are using (1 panel, 2 panels, 4 panels, 6 panels). If you are using the 2, 4, or 6 panel labels you may select to **Remember last panel** printed so you can reinsert the last used sheet to print on the remaining blank labels.

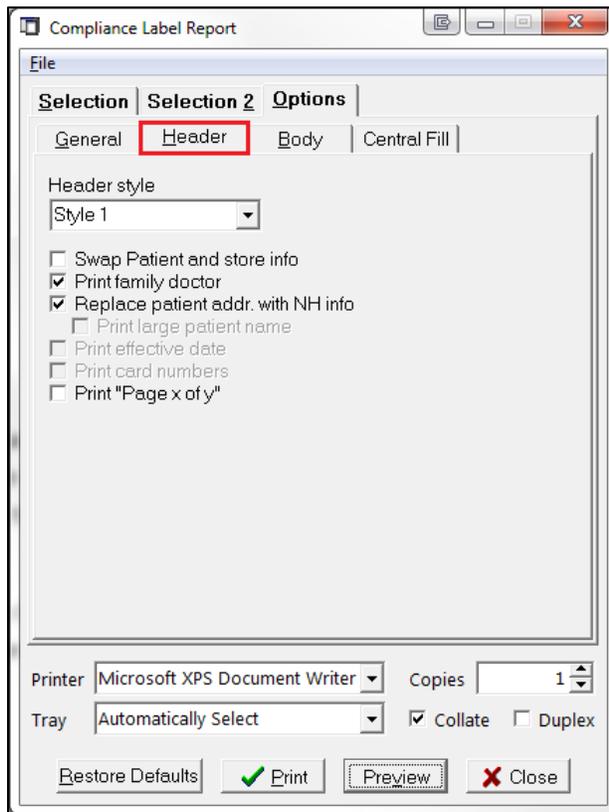
In addition, should the labels print off-centre, adjustments can be made to the horizontal and vertical positioning by using the X and Y offset controls. You can also set how you want the label and medications to be sorted.



## Header Tab

The **Header** tab allows you to choose from four header styles (Old Style (DOS), Header 1, Header 2, and Header 3). Each type varies slightly in the arrangement and type of information contained in the header. It is recommended that you preview each type and choose the one that best suits your pharmacy's needs.

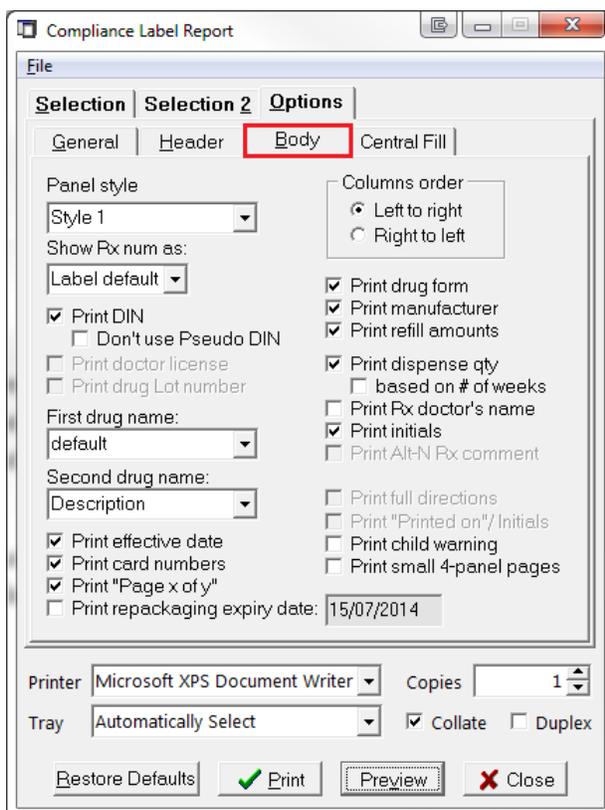
You can also choose to print certain information in the header as well as "swap" information should you want to print this information in a different location in the header.



## Body Tab

The **Body** tab allows you to customize the content of the compliance labels. There are six body styles to choose from: Old Style (Dos), Condensed, Style 1, Style 1 Large, Style 2, and Style 3. It is recommended that you preview each style and choose the one that best suits your pharmacy's needs.

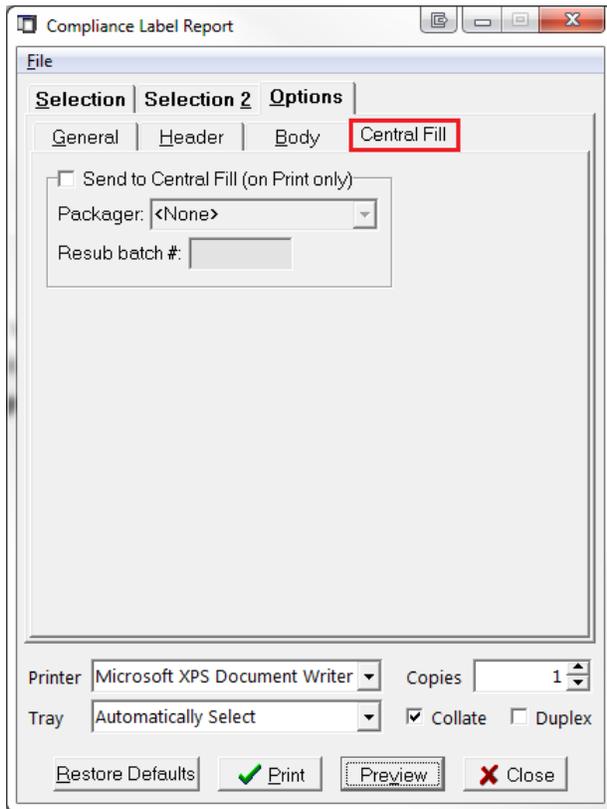
Some options on the **Body** tab may be greyed out depending on other selections you have made or provincial requirements. Due to space limitations, not all options on this tab can be printed at once.



**NOTE:** If you are running the report for a specific nursing home, patient group, or all, the selections you make will be retained so you do not need to select the same options each time you run the report.

## Central Fill Tab

The **Central Fill** tab is intended for pharmacies that use the Central Fill interface to fill prescriptions at a separate, centralized location. This tab allows you to **Send to Central Fill** upon printing the label and select the appropriate **Packager** type.



## Sample Compliance Label Reports

### 1 Panel:

Smith, Jane 100 Yonge St Toronto, ON M1M 1M1		Kroll Pharmacy 200 Krollwin Drive Toronto, ON N1N 1N1		8:00	12:00	17:00	21:00
Rx#	Form	Drug	Directions	Init	Description		
9000029 07-Mar-2014 00010081	TAB PPI 0	10 Propoxyphene HCl 65mg	TAKE 1 TABLET ONCE DAILY	KRL	1		
9000028 07-Mar-2014 02238646	TAB PPI 0	10 ASA/Meprobamate/Codiene Phosphate 350/200/15mg	TAKE 1	KRL	1		White Round Tab 282 MEP
1000038 17-Mar-2014 02263254	TAB LUN 0	10 Escitalopram 20mg	TAKE 1 TABLET ONCE DAILY	KRL			Wht Oval Tab'EN'
1000035 07-Mar-2014 02281066	POW BTC 0	10 Paclitaxel 100mg/vial	TAKE 1 TABLET ONCE DAILY	KRL	1		



