

Compliance Packaging



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Compliance Packaging

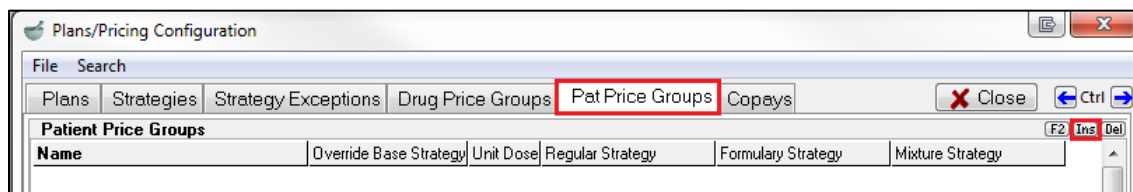
This user guide explains how to set up compliance packaging (i.e., unit dosing) in Kroll. Compliance packaging is available for both retail and nursing home patients.

Retail

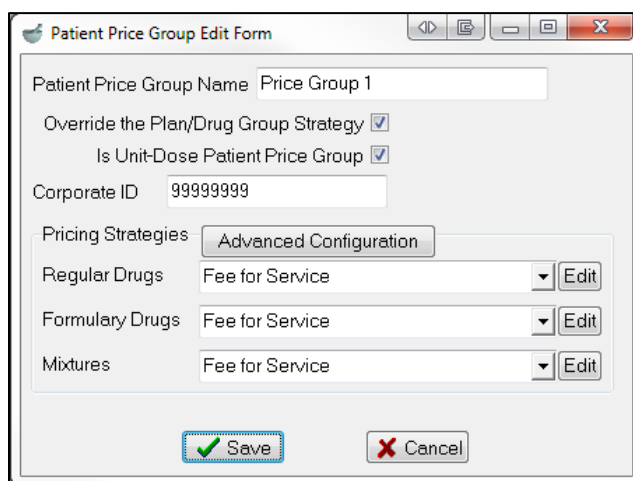
This section outlines how to set up compliance packaging for retail pharmacies. It explains how to set up patient price groups, how to configure patients for compliance packaging, and how to fill unit dose Rx's.

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**.

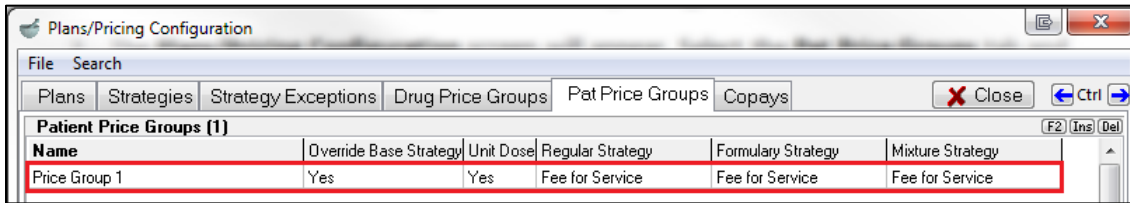


3. Complete the **Patient Price Group Edit Form**, ensuring the **Is Unit-Dose Patient Price Group** flag is enabled. Click **Save**.

The screenshot shows the 'Patient Price Group Edit Form' window. It has a title bar with 'Patient Price Group Edit Form' and standard window controls. The form 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'.
- 'Regular Drugs' dropdown menu with 'Fee for Service' selected and an 'Edit' button.
- 'Formulary Drugs' dropdown menu with 'Fee for Service' selected and an 'Edit' button.
- 'Mixtures' dropdown menu with 'Fee for Service' selected and an 'Edit' button.
- 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.



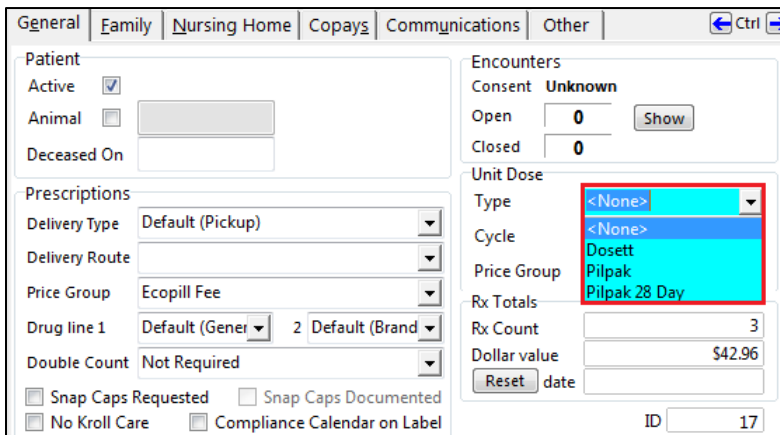
Name	Override Base Strategy	Unit Dose	Regular Strategy	Formulary Strategy	Mixture Strategy
Price Group 1	Yes	Yes	Fee for Service	Fee for Service	Fee for Service

- 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.



General | Family | Nursing Home | Copays | Communications | Other

Patient
 Active ☒
 Animal ☐
 Deceased On

Encounters
 Consent **Unknown**
 Open 0 Show
 Closed 0

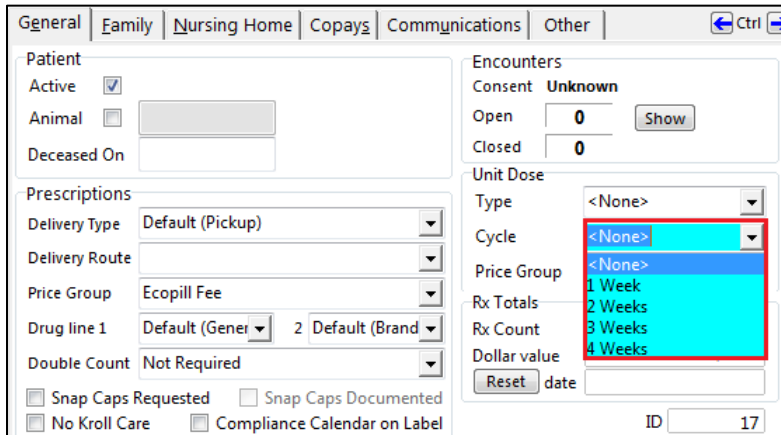
Unit Dose
 Type **<None>**
 Cycle **<None>**
 Price Group **Pilpak**
 Rx Totals
 Rx Count 3
 Dollar value \$42.96
 Reset date

Prescriptions
 Delivery Type Default (Pickup)
 Delivery Route
 Price Group Ecopill Fee
 Drug line 1 Default (Gener) 2 Default (Brand)
 Double Count Not Required
☐ Snap Caps Requested ☐ Snap Caps Documented
☐ No Kroll Care ☐ Compliance Calendar on Label

ID 17

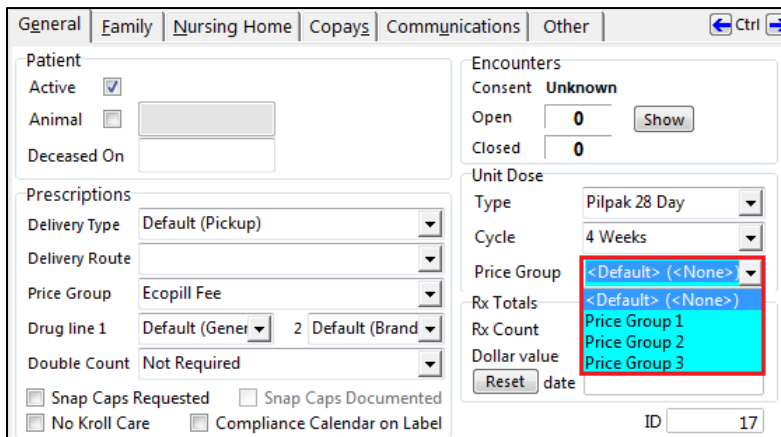
NOTE: When a unit dose type is set on the patient profile, the system will automatically prompt you to enroll Rx's filled for that patient into unit dosing.

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 the 'General' tab of the KROLL software interface. The 'Unit Dose' section is active, and the 'Cycle' dropdown menu is open, displaying a list of options: '<None>', '1 Week', '2 Weeks', '3 Weeks', and '4 Weeks'. The 'Price Group' dropdown is also visible, showing '<None>'. The 'Rx Totals' and 'Rx Count' fields are empty, and the 'Dollar value' field is set to 'Reset'.

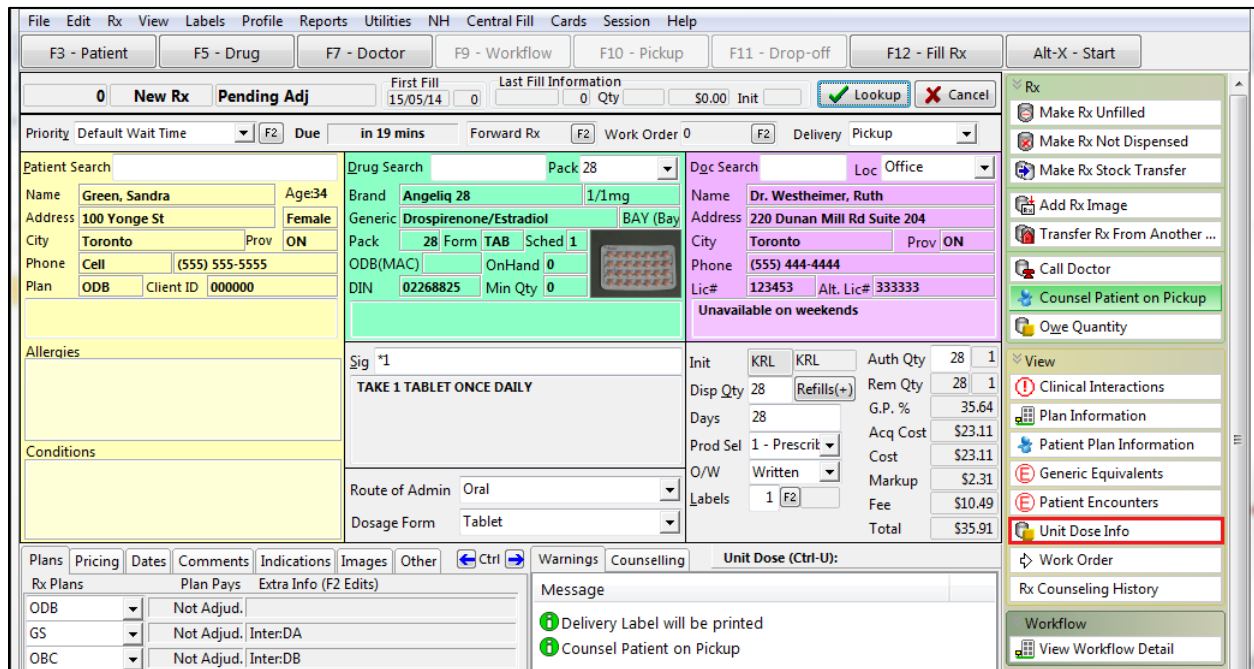
4. Select the appropriate price group from the **Price Group** dropdown menu.



The screenshot shows the 'General' tab of the KROLL software interface. The 'Price Group' dropdown menu is open, displaying a list of options: '<Default> (<None>)', 'Price Group 1', 'Price Group 2', and 'Price Group 3'. The 'Cycle' dropdown is also visible, showing '4 Weeks'. The 'Rx Totals' and 'Rx Count' fields are empty, and the 'Dollar value' field is set to 'Reset'.

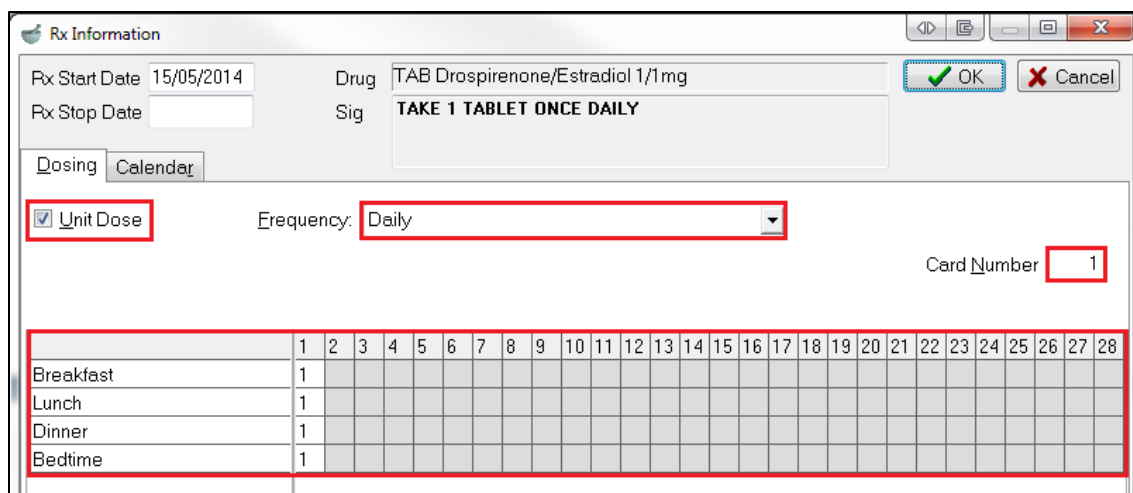
Filling Unit Dose Rx's

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 'New Rx' screen in the KROLL software. The 'Unit Dose Info' option is highlighted in the right navigation pane. The screen displays patient information (Green, Sandra), drug information (Angeliq 28), and a unit dose chart. The 'Unit Dose Info' option is highlighted in the right navigation pane.

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 screenshot shows the 'Rx Information' screen. The 'Unit Dose' checkbox is checked, the frequency is set to 'Daily', and the card number is '1'. The unit dose chart is also visible.

	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 way with to manually allocation which medication you would like to print on which card of pilpak. If you do not manually allocate the specific car number for the medication to be contained in, Kroll will default the **Card Number** field to '1'.

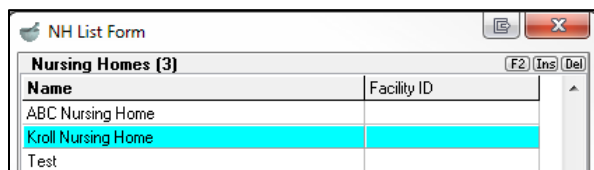
3. Click **OK** to close the **Rx Information** screen.

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 does Rx's.

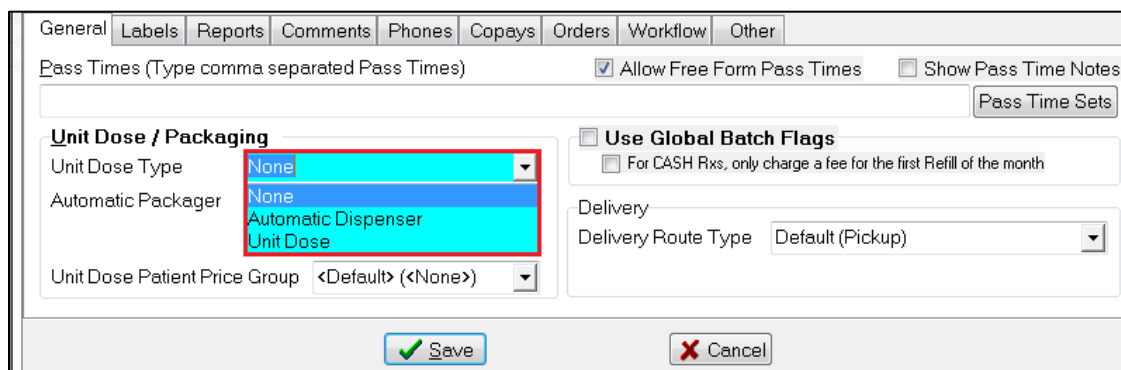
Setting up Nursing Homes

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.






Name	Facility ID
ABC Nursing Home	
Kroll Nursing Home	
Test	

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**.





General | Labels | Reports | Comments | Phones | Copays | Orders | Workflow | Other

Pass Times (Type comma separated Pass Times) ☒ Allow Free Form Pass Times ☐ Show Pass Time Notes Pass Time Sets

Unit Dose / Packaging
Unit Dose Type: None 
Automatic Packager: None 
Unit Dose Patient Price Group: None 

☐ **Use Global Batch Flags**
☐ For CASH Rx's, only charge a fee for the first Refill of the month

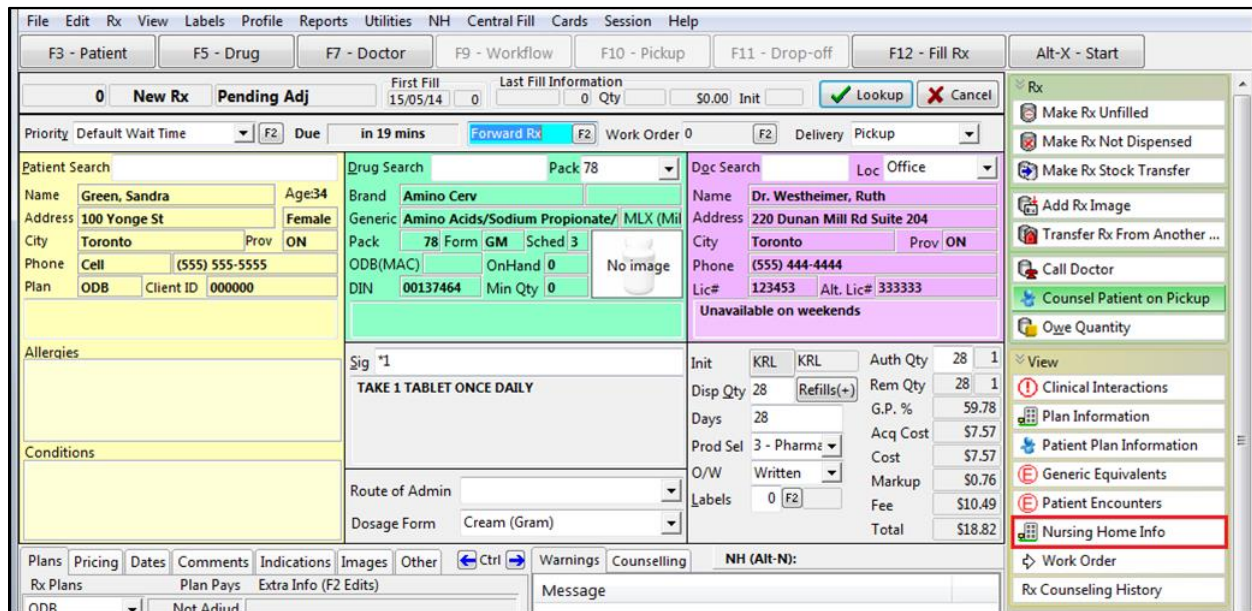
Delivery: None 
Delivery Route Type: Default (Pickup) 

✓ Save
✗ Cancel

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 Rx's

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

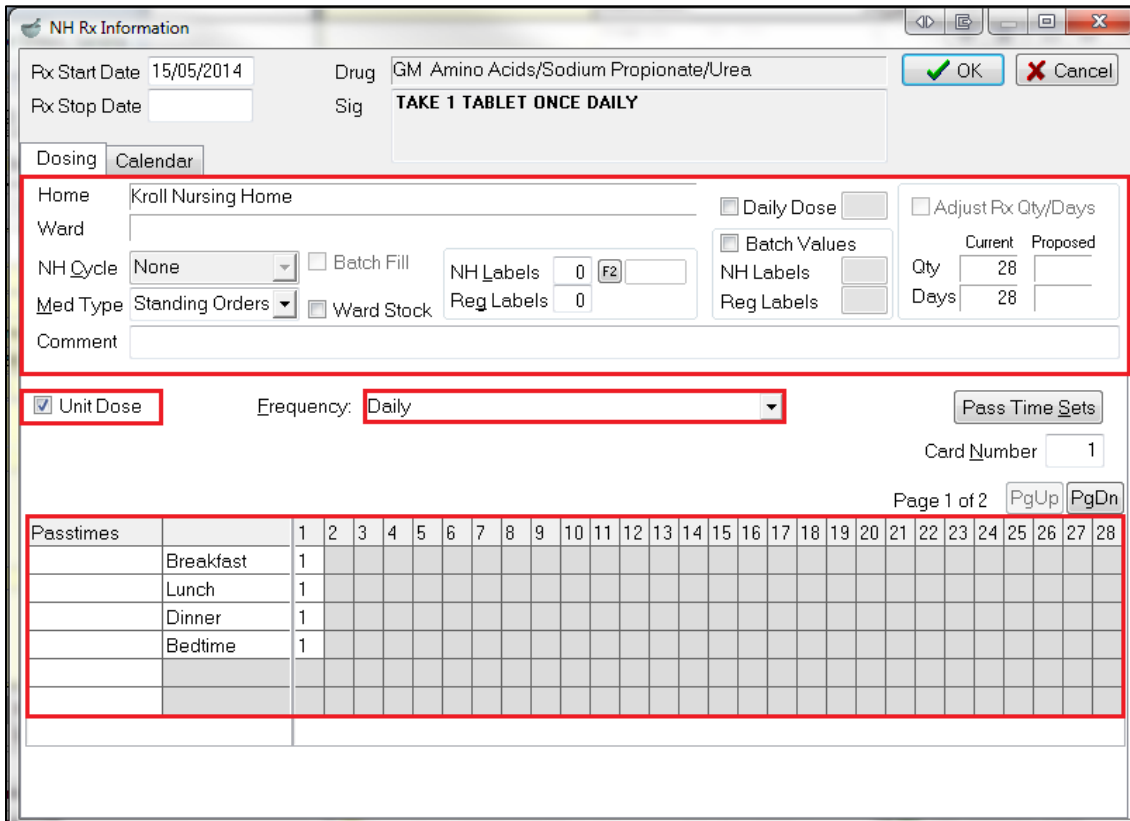


The screenshot displays the KROLL software interface for filling unit dose prescriptions. The interface is organized into several panes and sections:

- Menu Bar:** File, Edit, Rx, View, Labels, Profile, Reports, Utilities, NH, Central Fill, Cards, Session, Help.
- Toolbar:** F3 - Patient, F5 - Drug, F7 - Doctor, F9 - Workflow, F10 - Pickup, F11 - Drop-off, F12 - Fill Rx, Alt-X - Start.
- Patient Search Pane:**
 - Name: Green, Sandra; Age: 34; Female
 - Address: 100 Yonge St; City: Toronto; Prov: ON
 - Phone: Cell (555) 555-5555; Plan: ODB; Client ID: 000000
- Drug Search Pane:**
 - Brand: Amino Cerv; Pack: 78; Form: GM; Sched: 3
 - Generic: Amino Acids/Sodium Propionate/ MLX (Mil); ODB(MAC): 00137464; OnHand: 0; Min Qty: 0
- Dgc Search Pane:**
 - Name: Dr. Westheimer, Ruth; Address: 220 Dunan Mill Rd Suite 204; City: Toronto; Prov: ON
 - Phone: (555) 444-4444; Lic#: 123453; Alt. Lic#: 333333
 - Unavailable on weekends
- NH (Alt-N): Pane:**
 - Init: KRL; KRL; Auth Qty: 28; 1
 - Disp Qty: 28; Refills(+): 1
 - Days: 28; G.P. %: 59.78
 - Prod Sel: 3 - Pharm; Acq Cost: \$7.57
 - O/W: Written; Cost: \$7.57
 - Labels: 0 F2; Markup: \$0.76
 - Fee: \$10.49
 - Total: \$18.82
- Right Navigation Pane:**
 - 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), Work Order, Rx Counseling History

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

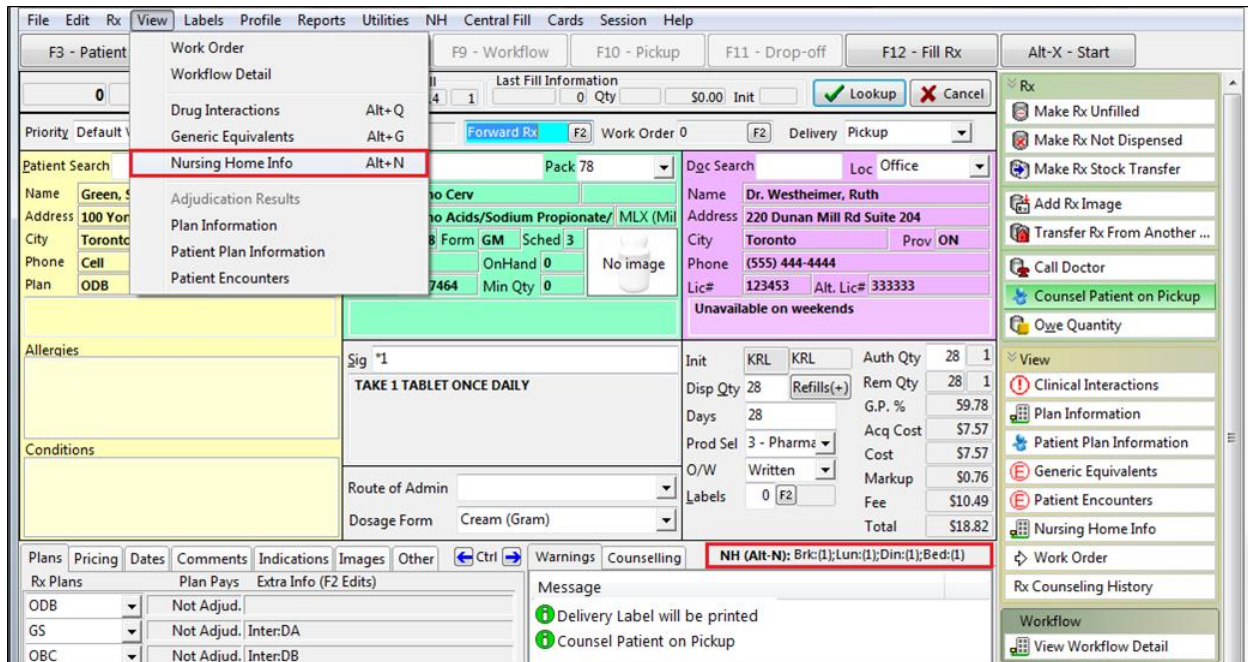
- Ensure the **Unit Dose** flag is enabled
- Enter any dosing information that pertains to the Rx
- Select a dosing **Frequency** from the dropdown menu
- Complete the dosing chart



NOTE: Each card can only hold a certain number of medications, depending on the compliance packaging you use; therefore, you way with to manually allocation which medication you would like to print on which card of pilpak. If you do not manually allocate the specific car 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.



The screenshot shows the KROLL software interface. The 'View' menu is open, and 'Nursing Home Info' is highlighted. The main window displays patient information for Dr. Westheimer, Ruth, and a list of actions on the right. The 'NH (Alt+N)' button is visible in the bottom right corner of the main window.

Compliance Label Report

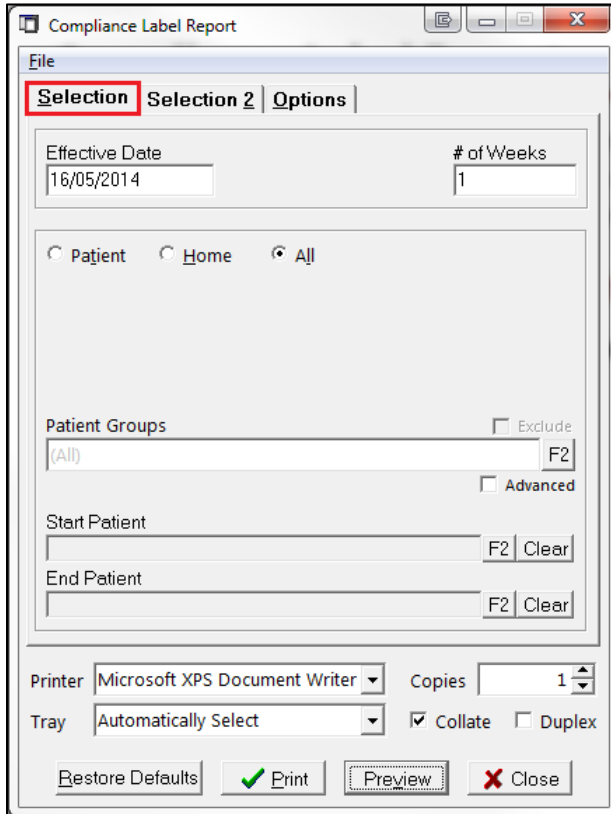
Once all prescriptions to be packaged have been processed, the Compliance Label Report can be run. Depending on the supplier you ordered the reports from the labels may have a sticky backing that allows the labels to be stuck to the card or pilpak after printing.

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.

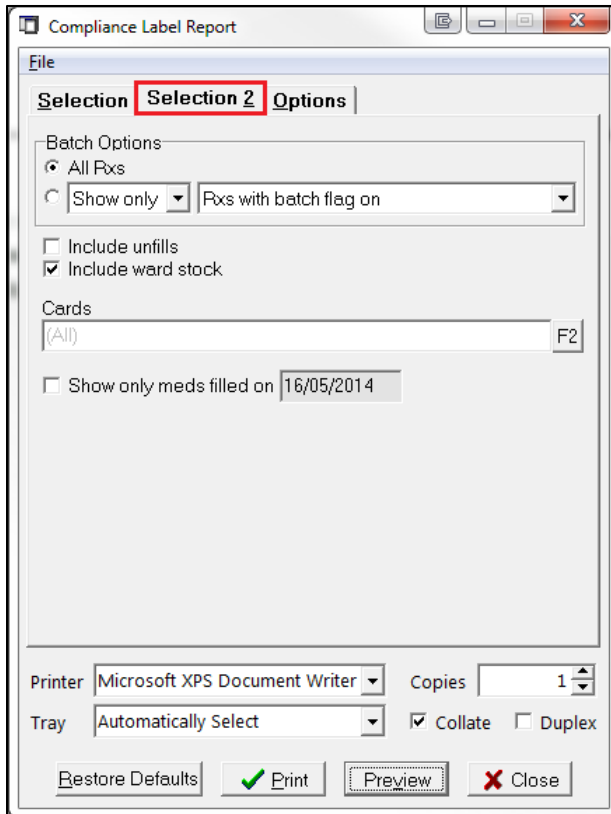


The screenshot shows the "Compliance Label Report" window with the "Selection" tab active. The "Effective Date" is set to 16/05/2014 and the "# of Weeks" is 1. The "Patient" radio button is selected. The "Patient Groups" list contains "(All)". The "Start Patient" and "End Patient" fields are empty. The "Printer" is set to "Microsoft XPS Document Writer" and "Copies" is 1. The "Tray" is set to "Automatically Select". The "Collate" checkbox is checked and the "Duplex" checkbox is unchecked. The "Print" button is highlighted with a green checkmark.

Field	Value
Effective Date	16/05/2014
# of Weeks	1
Patient Selection	<input checked="" type="radio"/> Patient, <input type="radio"/> Home, <input type="radio"/> All
Patient Groups	(All)
Start Patient	
End Patient	
Printer	Microsoft XPS Document Writer
Copies	1
Tray	Automatically Select
Collate	<input checked="" type="checkbox"/>
Duplex	<input type="checkbox"/>

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 "Batch Options" section includes radio buttons for "All Pxs" (selected) and "Show only" (disabled), with a dropdown menu set to "Pxs with batch flag on". Below this are checkboxes for "Include unfills" (unchecked) and "Include ward stock" (checked). The "Cards" section has a dropdown menu set to "(All)" and a button labeled "F2". A checkbox for "Show only meds filled on" is followed by a date field containing "16/05/2014". The bottom section contains a "Printer" dropdown set to "Microsoft XPS Document Writer", a "Copies" spinner set to "1", a "Tray" dropdown set to "Automatically Select", and checkboxes for "Collate" (checked) and "Duplex" (unchecked). At the bottom are buttons for "Restore Defaults", "Print" (with a green checkmark), "Preview", and "Close" (with a red X).

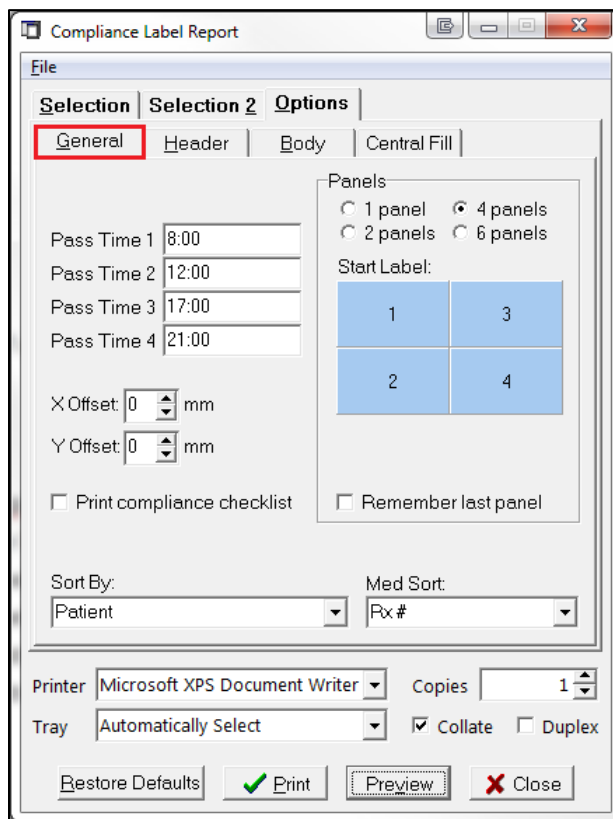
Options Tab

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.



The screenshot shows the 'Compliance Label Report' dialog box with the 'Options' tab selected. The 'General' sub-tab is active. The 'Pass Time' section has four input fields: 8:00, 12:00, 17:00, and 21:00. The 'X Offset' and 'Y Offset' are both set to 0 mm. The 'Print compliance checklist' checkbox is unchecked. The 'Panels' section shows radio buttons for 1, 2, 4, and 6 panels, with '4 panels' selected. The 'Start Label' section shows a 2x2 grid of blue boxes labeled 1, 2, 3, and 4. The 'Remember last panel' checkbox is unchecked. The 'Sort By' dropdown is set to 'Patient' and the 'Med Sort' dropdown is set to 'Rx #'. The 'Printer' dropdown is set to 'Microsoft XPS Document Writer' and the 'Copies' spinner is set to 1. The 'Tray' dropdown is set to 'Automatically Select'. The 'Collate' checkbox is checked and the 'Duplex' checkbox is unchecked. At the bottom are buttons for 'Restore Defaults', 'Print', 'Preview', and 'Close'.

Selection	Selection 2	Options
General	Header	Body
		Central Fill

Pass Time 1: 8:00
Pass Time 2: 12:00
Pass Time 3: 17:00
Pass Time 4: 21:00

X Offset: 0 mm
Y Offset: 0 mm

☐ Print compliance checklist

Panels
☐ 1 panel ☒ 4 panels
☐ 2 panels ☐ 6 panels

Start Label:

1	3
2	4

☐ Remember last panel

Sort By: Patient Med Sort: Rx #

Printer: Microsoft XPS Document Writer Copies: 1

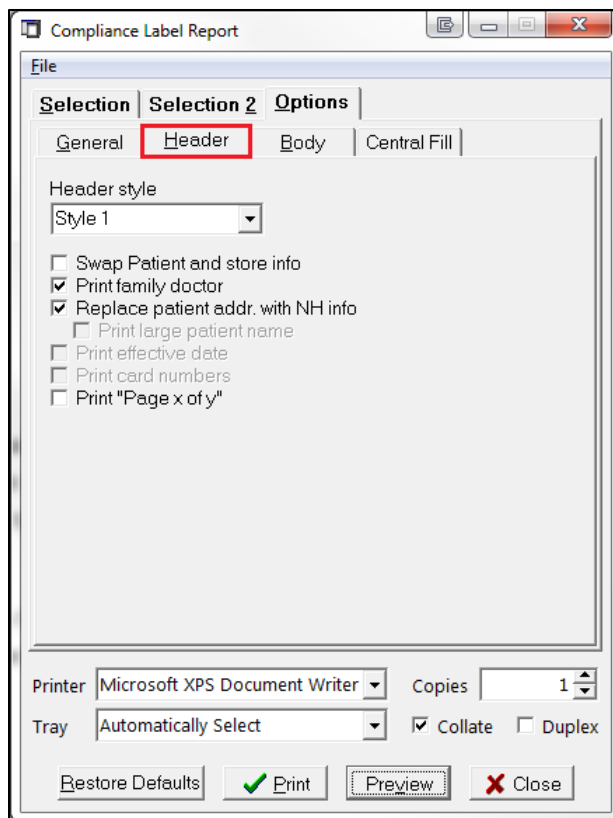
Tray: Automatically Select ☒ Collate ☐ Duplex

Restore Defaults Print Preview Close

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.

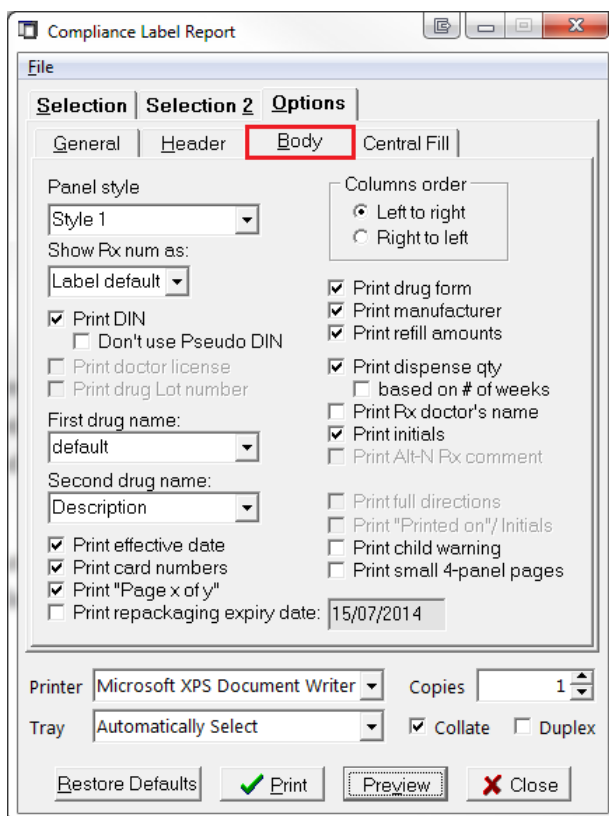
You can also choose to print certain information in the header as well as "swap" information should you want to print this information in a different location in the header.



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.



The screenshot shows the 'Compliance Label Report' dialog box with the 'Body' tab selected. The 'Body' tab is highlighted with a red box. The 'General' tab is also visible. The 'Body' tab contains the following options:

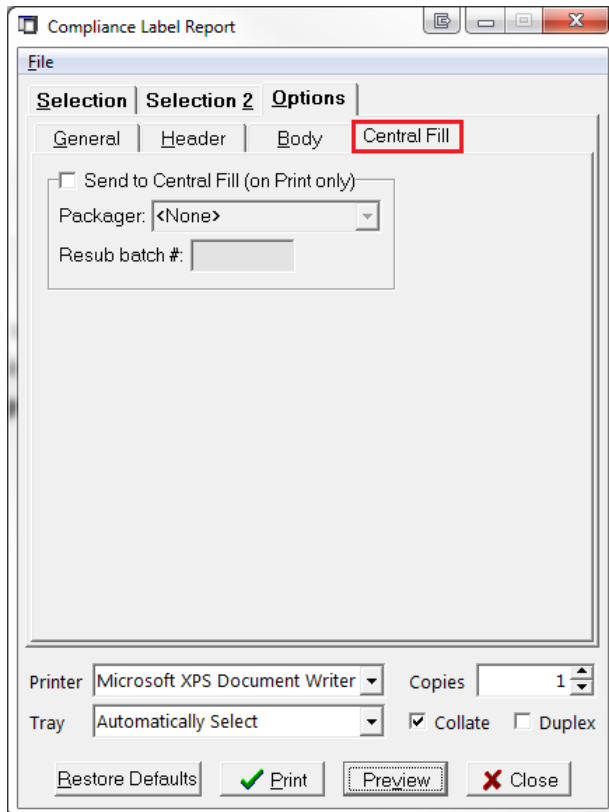
- Panel style: Style 1 (dropdown)
- Show Rx num as: Label default (dropdown)
- Columns order:
 - ☒ Left to right
 - ☐ Right to left
- ☒ Print DIN
- ☐ Don't use Pseudo DIN
- ☐ Print doctor license
- ☐ Print drug Lot number
- First drug name: default (dropdown)
- Second drug name: Description (dropdown)
- ☒ Print effective date
- ☒ Print card numbers
- ☒ Print "Page x of y"
- ☐ Print repackaging expiry date: 15/07/2014
- ☒ Print drug form
- ☒ Print manufacturer
- ☒ Print refill amounts
- ☒ Print dispense qty
- ☐ based on # of weeks
- ☐ Print Rx doctor's name
- ☒ Print initials
- ☐ Print Alt-N Rx comment
- ☐ Print full directions
- ☐ Print "Printed on"/ Initials
- ☐ Print child warning
- ☐ Print small 4-panel pages

At the bottom, there are printer settings: Printer: Microsoft XPS Document Writer, Copies: 1, Tray: Automatically Select, Collate: ☒, Duplex: ☐. Buttons at the bottom include Restore Defaults, Print, Preview, and Close.

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.



The screenshot shows the 'Compliance Label Report' window with the 'Central Fill' tab selected. The 'Send to Central Fill (on Print only)' checkbox is checked. The 'Packager' dropdown is set to '<None>'. The 'Resub batch #' field is empty. At the bottom, the printer is set to 'Microsoft XPS Document Writer', 'Copies' is 1, 'Tray' is 'Automatically Select', and 'Collate' is checked. Buttons for 'Restore Defaults', 'Print', 'Preview', and 'Close' are visible.

Sample Compliance Label Reports

1 Panel:

Smith, Jane 100 Yonge St Toronto, ON M1M 1M1			Kroll Pharmacy 200 Krollwin Drive Toronto, ON N1N 1N1			
Rx#	Form	Drug	8:00	12:00	17:00	21:00
Fill date	MFR	Directions	Init	Description		
DIN	REFILL					
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			

[illegible][illegible]

6 Panels:

Patient Information				Medication Schedule					
Rx#	Form	Drug	Directions	Init	Description	8:00	12:00	17:00	21:00
1000054	TAB	30MaprotilineHCl10mg	TAKE1TABLETNCEDAILY	BT	Creem Round Tab Ciba CO				
09-May-2014	NOV								
00641855	0								
Start Date: 16-May-2014 Card 1 Page 1 of 1									

Patient Information				Medication Schedule					
Rx#	Form	Drug	Directions	Init	Description	8:00	12:00	17:00	21:00
9000040	TAB	30PropoxypheneHCl65mg	TAKE1TABLETNCEDAILY	BT					
09-May-2014	PPI								
00010081	0								
Start Date: 16-May-2014 Card 1 Page 1 of 1									

Patient Information				Medication Schedule					
Rx#	Form	Drug	Directions	Init	Description	8:00	12:00	17:00	21:00
9000041	TAB	30 ASA/ Meprobamate/ Codeine Phosphate 350/200/15mg	TAKE1TABLETNCEDAILY	BT	White Round Tab 282 MBP				
09-May-2014	PPI								
02238646	0								
Start Date: 16-May-2014 Card 1 Page 1 of 1									

Patient Information				Medication Schedule					
Rx#	Form	Drug	Directions	Init	Description	8:00	12:00	17:00	21:00
9000038	TAB	30 ASA/ Meprobamate/ Codeine Phosphate 350/200/15mg	TAKE1TABLETNCEDAILY	BT	White Round Tab 282 MBP				
08-May-2014	PPI								
02238646	0								
Start Date: 16-May-2014 Card 1 Page 1 of 1									

Patient Information				Medication Schedule					
Rx#	Form	Drug	Directions	Init	Description	8:00	12:00	17:00	21:00
1000057	GM	28AminoAcids/ SodiumPropionate/ Urea	TAKE1TABLETNCEDAILY	KRL					
16-May-2014	MLX								
00137464	0								
Start Date: 16-May-2014 Card 1 Page 1 of 1									

Patient Information				Medication Schedule					
Rx#	Form	Drug	Directions	Init	Description	8:00	12:00	17:00	21:00
9000036	TAB	30PropoxypheneHCl65mg	TAKE1TABLETNCEDAILY	KRL					
02-Apr-2014	PPI								
00010081	0								
Start Date: 16-May-2014 Card 1 Page 1 of 1									

Patient Information				Medication Schedule					
Rx#	Form	Drug	Directions	Init	Description	8:00	12:00	17:00	21:00
1000040	POW	30Paclitaxel100mg/vial	TAKE1TABLETNCEDAILY	KRL					
02-Apr-2014	BTC								
02281066	0								
Start Date: 16-May-2014 Card 1 Page 1 of 1									

Patient Information				Medication Schedule					
Rx#	Form	Drug	Directions	Init	Description	8:00	12:00	17:00	21:00
1000045	TAB	30Hydrochlorothiazide/ Amloride50/5mg	TAKE1TABLETNCEDAILY	BT					
09-May-2014	PDL								
00870943	0								
Start Date: 16-May-2014 Card 1 Page 1 of 1									