



# Documenting Rx Counseling

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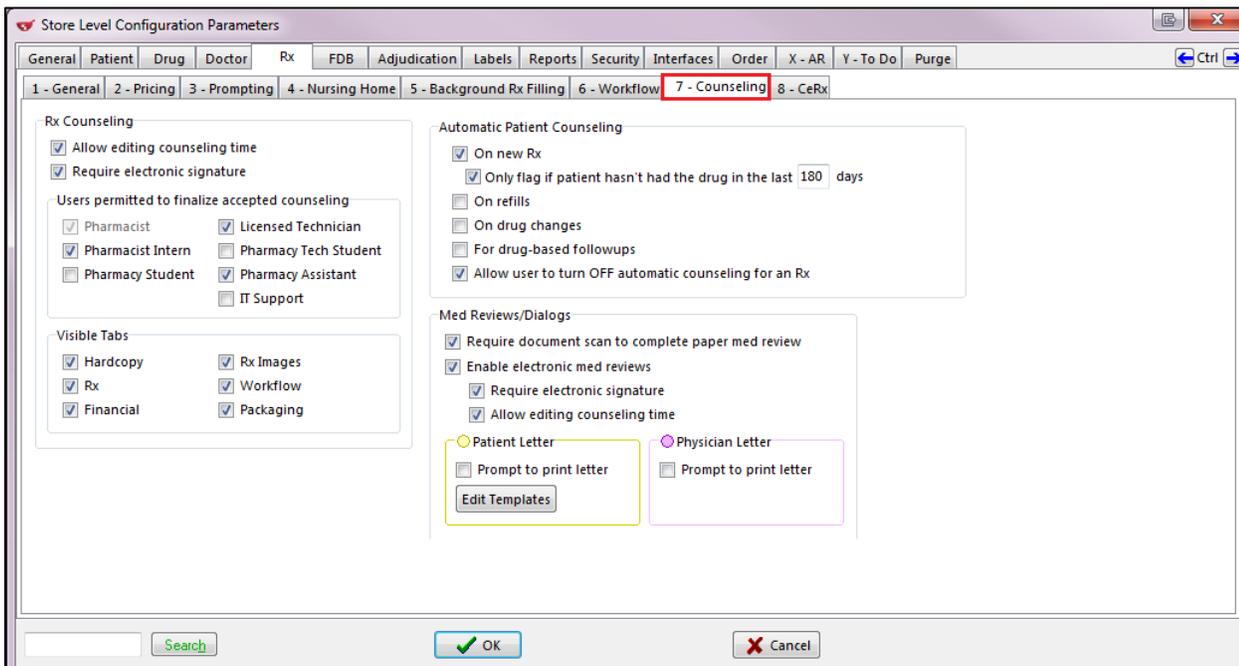
## Documenting Rx Counseling

The process of documenting Rx counseling helps pharmacies meet the legal requirements for document counseling. By completing the steps in the Counseling screen in Kroll, pharmacies ensure that there is documented support of what was discussed with a patient during an Rx counseling session.

This document explains in detail how to configure Rx counseling that can be performed automatically or manually, documenting Rx counseling, printing and scanning the prescription counseling worksheets and viewing counseling history.

## Configuration

Counseling settings can be modified in **File > Configuration > Store > Rx > Counseling**.



- **Rx Counseling:** allows you to control whether or not counseling times can be edited and to set up electronic signatures;
  - **Allow editing counseling time:** allows you to record the amount of time it took to complete the counseling session;
  - **Require Electronic Signature:** for this option to be available, **Allow Electronic Signatures** must be enabled in **File > Configuration > Kroll > Configuration**.
- **Users Permitted to Finalize Accepted Counseling:** allows you to control which pharmacy users are able to finalize a counseling record;
- **Visible Tabs:** allows you to control what tabs are visible on the Counseling screen;
- **Automatic Patient Counseling:** allows you to control whether new Rx's, refills, and drug changes should automatically have a counseling record created.
- **Med Reviews/Dialogs:** allows you to configure Medication Reviews for both paper based and electronic records.
  - **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.
- **Prompt to print letter:** allows you to enable prompting for patient letters and/or physician letters.

## Automatic and Manual Counseling

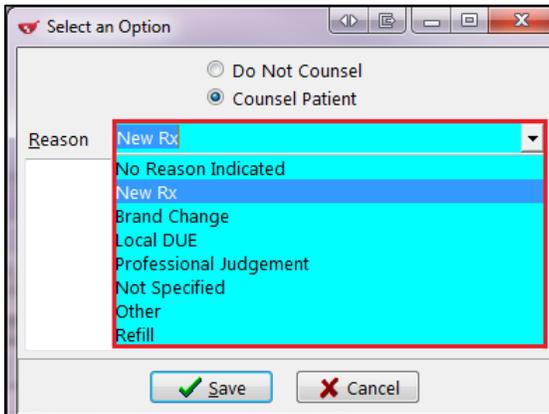
This section explains how to document Rx counseling in Kroll. Counseling for Rxs can either be configured automatically or performed manually.

### Automatic Rx Counseling

When Rxs have been configured for automatic counseling, the **Counsel Patient on Pickup** option on the right navigation pane on the F12 screen will be enabled, and a warning message stating **'Counsel Patient on Pickup'** will appear at the bottom of the F12 screen.

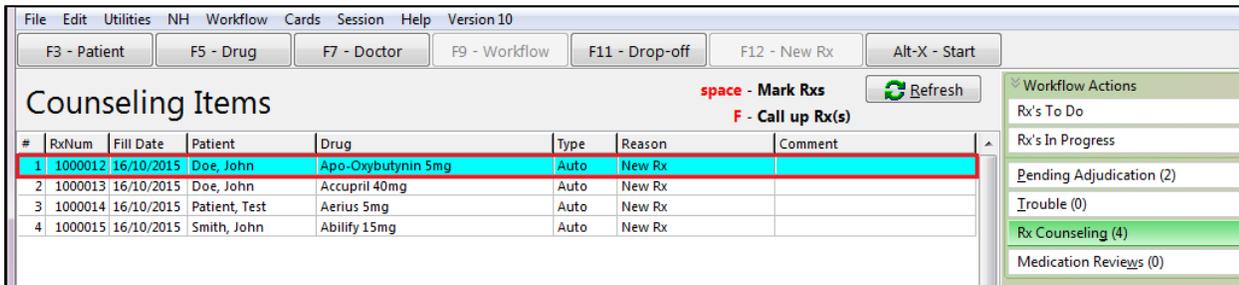
The screenshot displays the Kroll F12 screen for a patient named John Doe. The interface includes a menu bar at the top with options like File, Edit, Rx, View, Labels, Profile, Reports, Utilities, NH, Cards, Session, and Help. Below the menu are function keys (F3-F12) and buttons for 'New Rx', 'Pending Adj', 'Lookup', and 'Cancel'. The main area is divided into several sections: Patient Search (Name: Doe, John; Age: 35; Address: 100 Yonge St; City: Toronto; Phone: (222) 222-2222; Plan: ODB; Client ID: 123456789), Drug Search (Brand: Apo-Oxybutynin 5mg; Generic: Oxybutynin Chloride; Pack: 500 Form TAB; ODB(BAP): \$49.30; OnHand: 0; DIN: 02163543; Min Qty: 0), and Dgc Search (Name: Dr. Test, Test; Address: 220 Duncan Mills Road; City: Toronto; Phone: (555) 555-5555; Lic#: 1234567; Alt. Lic#: ). A navigation pane on the right contains options such as 'Make Rx Unfilled', 'Make Rx Not Dispensed', 'Make Rx Stock Transfer', 'Add Rx Image', 'Transfer Rx From Another Store', 'Call Doctor', 'Counsel Patient on Pickup' (highlighted with a red box), and 'Owe Quantity'. Below the navigation pane is a 'View' section with options like 'Clinical Interactions', 'Patient Plan Information', 'Generic Equivalents', 'Nursing Home Info', and 'Work Order'. At the bottom, a 'Message' box displays two warnings: 'Delivery Label will be printed' and 'Counsel Patient on Pickup' (highlighted with a red box). The bottom right corner shows a 'Workflow' section with a 'View Workflow Detail' button.

To include a counseling reason, select **Counsel Patient on Pickup** from the right navigation pane. Select a counseling reason from the **Reason** dropdown menu and then click **Save**.



**NOTE:** Kroll will automatically record a counseling reason if the Rx matches the configuration criteria. Additionally, if you do NOT want to counsel the patient, select the **Do Not Counsel** radio button from the above form and click **Save**.

A counseling record will automatically add to the **Counseling Items** list in the F9-Workflow screen:

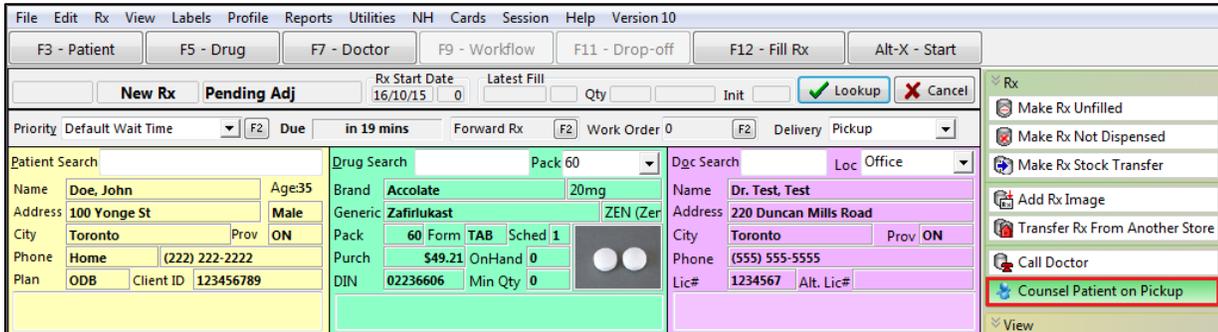


#	RxNum	Fill Date	Patient	Drug	Type	Reason	Comment
1	1000012	16/10/2015	Doe, John	Apo-Oxybutynin 5mg	Auto	New Rx	
2	1000013	16/10/2015	Doe, John	Accupril 40mg	Auto	New Rx	
3	1000014	16/10/2015	Patient, Test	Aerius 5mg	Auto	New Rx	
4	1000015	16/10/2015	Smith, John	Abilify 15mg	Auto	New Rx	

## Manual Rx Counseling

When Rxs are not configured for automatic counseling, the Counsel Patient on Pickup found on the right navigation pane of F12 screen will be disabled.

1. To manually enable patient counseling, select **Counsel Patient on Pickup** from the right navigation pane on the F12 screen.



The screenshot shows the 'F12 - Fill Rx' window. The top menu includes File, Edit, Rx, View, Labels, Profile, Reports, Utilities, NH, Cards, Session, and Help. Below the menu are function keys: F3 - Patient, F5 - Drug, F7 - Doctor, F9 - Workflow, F11 - Drop-off, F12 - Fill Rx, and Alt-X - Start. The main area is divided into sections for Patient Search, Drug Search, and Dgc Search. The Patient Search section shows: Name: Doe, John; Age: 35; Address: 100 Yonge St; City: Toronto; Prov: ON; Phone: Home (222) 222-2222; Plan: ODB; Client ID: 123456789. The Drug Search section shows: Brand: Accolate; Pack: 60; Form: TAB; Sched: 1; Generic: Zafirlukast; ZEN (Zer); Purch: \$49.21; On-Hand: 0; DIN: 02236606; Min Qty: 0. The Dgc Search section shows: Name: Dr. Test, Test; Address: 220 Duncan Mills Road; City: Toronto; Prov: ON; Phone: (555) 555-5555; Lic#: 1234567; Alt. Lic#: . On the right side, there is a navigation pane with several options: Make Rx Unfilled, Make Rx Not Dispensed, Make Rx Stock Transfer, Add Rx Image, Transfer Rx From Another Store, Call Doctor, and Counsel Patient on Pickup. The 'Counsel Patient on Pickup' option is highlighted with a red box.

2. Select a counseling reason from the **Reason** dropdown menu and click **Save**.



The 'Select an Option' dialog box contains two radio buttons: 'Do Not Counsel' and 'Counsel Patient', with 'Counsel Patient' selected. Below the radio buttons is a 'Reason' dropdown menu. The dropdown menu is open, showing a list of options: 'No Reason Indicated', 'New Rx', 'Brand Change', 'Local DUE', 'Professional Judgement', 'Not Specified', 'Other', and 'Refill'. The 'New Rx' option is highlighted. At the bottom of the dialog box are 'Save' and 'Cancel' buttons.

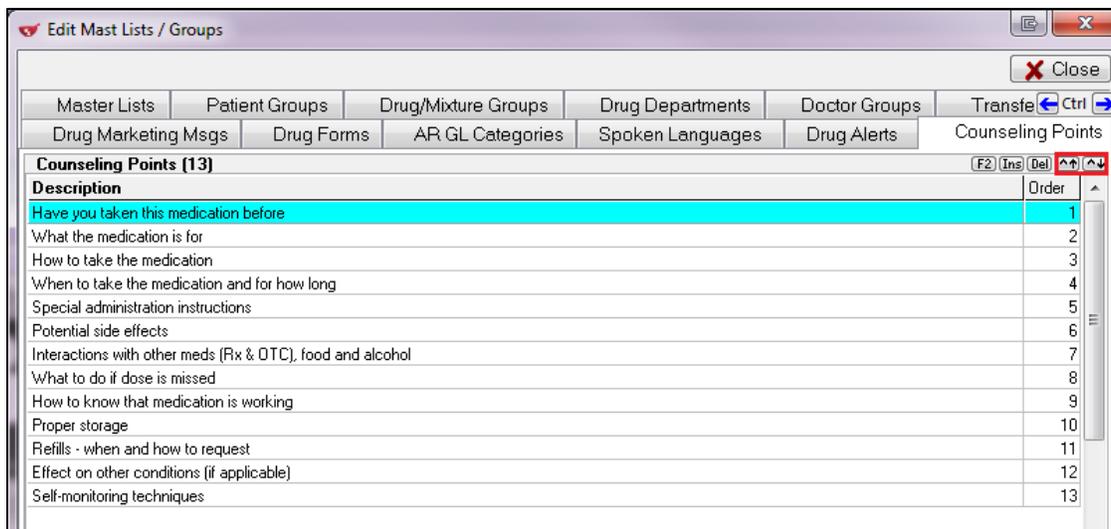
A counseling record will add to the **Counseling Items** list.

## Documenting Rx Counseling

This section explains how to edit the counseling points that appear on the Counseling screen, how to call up an Rx to be counselled, how to document Rx counseling, how to create counseling follow-up, how to print and scan the Prescription Counseling Worksheet, and how to view patients' counseling histories.

### Editing Counseling Points

1. From the **Alt-X - Start** screen, go to **Edit > Lists**.
2. Click the **Counseling Points** tab.
3. Click **F2** to edit a counseling point, **Ins** to add a new counseling point, and **Del** to delete a counseling point, or press **F2**, **Insert**, and **Delete** on your keyboard.
4. Use the **up** and **down** arrows to reorder the counseling points.



Description	Order
Have you taken this medication before	1
What the medication is for	2
How to take the medication	3
When to take the medication and for how long	4
Special administration instructions	5
Potential side effects	6
Interactions with other meds (Rx & OTC), food and alcohol	7
What to do if dose is missed	8
How to know that medication is working	9
Proper storage	10
Refills - when and how to request	11
Effect on other conditions (if applicable)	12
Self-monitoring techniques	13

## Calling up an Rx to be counseled

### Method 1: From the Workflow screen

1. From the **Alt-X Start** screen, click the **Workflow** button or press **F9** on your keyboard.
2. Select **Rx Counseling** from the right navigation pane.

The screenshot shows the 'Workflow' screen with a table of 'Counseling Items' and a 'Workflow Actions' sidebar. The 'Rx Counseling (4)' action is highlighted in red in the sidebar.

#	RxNum	Fill Date	Patient	Drug	Type	Reason	Comment
1	1000012	16/10/2015	Doe, John	Apo-Oxybutynin 5mg	Auto	New Rx	
2	1000013	16/10/2015	Doe, John	Accupril 40mg	Auto	New Rx	
3	1000014	16/10/2015	Patient, Test	Aerius 5mg	Auto	New Rx	
4	1000015	16/10/2015	Smith, John	Abilify 15mg	Auto	New Rx	

3. Double-click an Rx and the **Counseling** screen will appear.

### Method 2: From the Alt-X Start screen

1. Enter the Rx number in the search field and click **Counsel Rx**.

The screenshot shows the 'Alt-X Start' screen with a search field containing '1000012' and a 'Counsel Rx' button highlighted in red. Below the search field is a 'Rx Work in Progress' table.

	Overdue	0-1 hrs	1-4 hrs	4+ hrs	Tomorrow	Trouble	Total
ToDo/Data Entry	0	0	0	0	0	0	0
Package Rx	2	1	0	0	0	0	3
Technical Verification	0	0	0	0	0	0	0
Therapeutic Verification	0	0	0	0	0	0	0
Incomplete Pickups	0	0	0	0	0	0	0

The **Counseling** screen will appear.

### Method 3: From the Patient Profile

1. Call up a patient profile and select **All Rx's** from the right navigation pane.
2. Click to highlight the Rx record and select **Extra Functions > Counsel**.

#	Status	Orig Rx	Rx Num	Date	Agg Qty	Auth	Rem	Brand Name	Doctor
1		1000014	1000014	16/10/2015	0	30	30	Aerius 5mg	Test,Test
2		1000008	1000008	10/09/2015	36	100	100	3TC 150mg	Test,Test
3		1000007	1000007	19/06/2015	119	1	1	Accutane 10mg	Test,Test
4		1000006	1000006	15/06/2015	123	1	1	Gummies Vitamins	Test,Test
5		1000005	1000005	15/06/2015	123	1	1	B&I Se Lens Lub	Test,Test
6		9000001	9000001	15/06/2015	123	1	1	Apo-Butorphanol 10mg	Test,Test
7		1000004	1000004	15/06/2015	123	1	1	Complete All-In-One Soln	Test,Test
8		1000003	1000003	15/06/2015	123	12	12	Acyclovir 200mg	Test,Test
9		1000002	1000002	15/06/2015	123	1	1	Lipitor 80mg	Test,Test
10		1000001	1000001	15/06/2015	123	1	1	Crestor 5mg	Test,Test

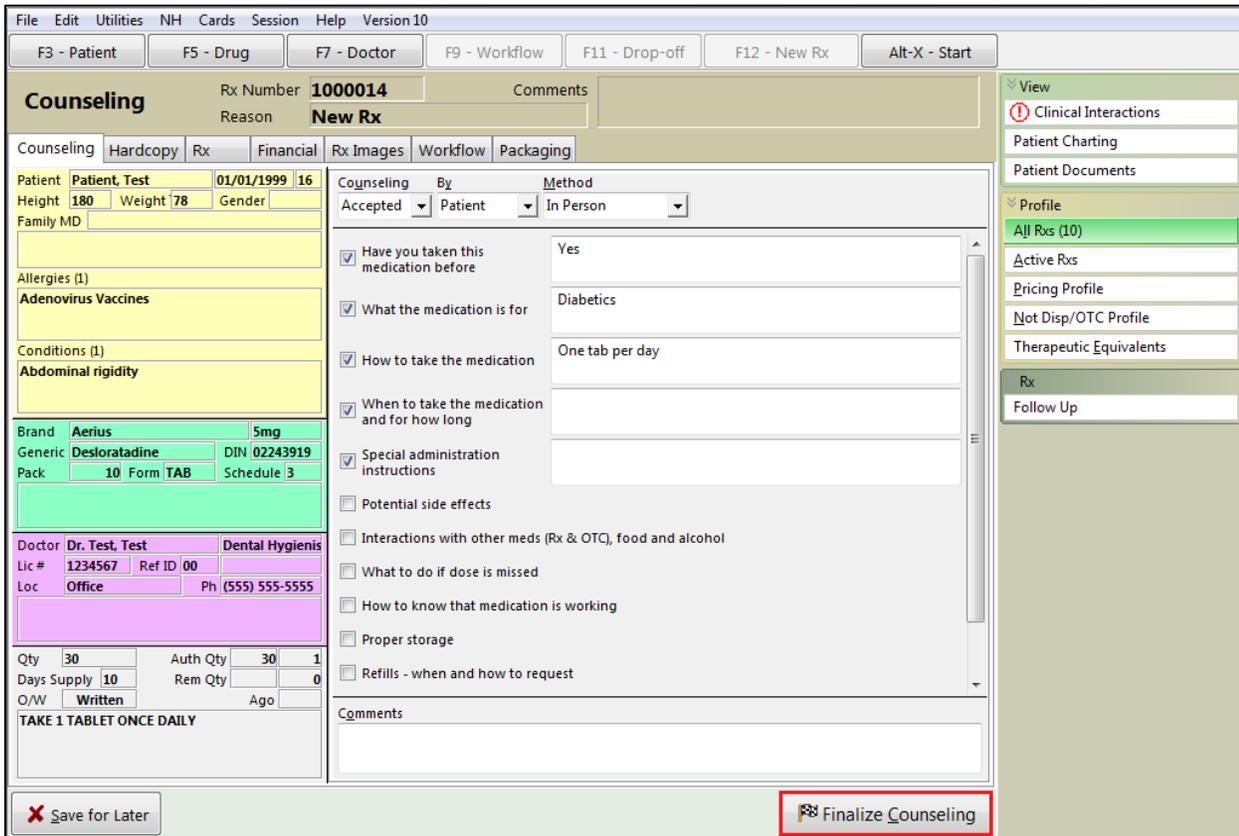
The **Counseling** screen will appear.

### Counseling Accepted by Patient

When a request for counseling is accepted by the patient, call up the **Counseling** screen for the Rx and do the following:

1. Select Yes when asked 'Does the Patient accept counseling?'
2. Select Patient when asked 'Counseling is received by?'
3. Select In Person or By Phone when asked 'What is the Counseling Method?'
4. Place a checkmark next to the counseling points that were covered during the counseling session. Enter any additional information in the text box that appears next to each counseling point.
5. If you want to complete documenting the counseling session at a later time, click Save for Later.

- When you are finished, click **Finalize Counseling**. If electronic signatures are enabled, you will be prompted for your signature.



The screenshot displays the 'Counseling' screen in the TELUS Health software. At the top, there is a menu bar with options like 'File', 'Edit', 'Utilities', 'NH', 'Cards', 'Session', and 'Help'. Below the menu, there are tabs for 'F3 - Patient', 'F5 - Drug', 'F7 - Doctor', 'F9 - Workflow', 'F11 - Drop-off', 'F12 - New Rx', and 'Alt-X - Start'. The main area is divided into several sections: 'Counseling' (with sub-tabs for 'Hardcopy', 'Rx', 'Financial', 'Rx Images', 'Workflow', 'Packaging'), 'Patient' information (Name: Patient, Test; DOB: 01/01/1999; Height: 180; Weight: 78; Gender: ), 'Allergies' (Adenovirus Vaccines), 'Conditions' (Abdominal rigidity), 'Medication' details (Brand: Aeriuss, Generic: Desloratadine, Pack: 10 Form TAB, Schedule 3), and 'Doctor' information (Dr. Test, Test; Dental Hygienist). A 'Counseling' section contains checkboxes for 'Have you taken this medication before', 'What the medication is for', 'How to take the medication', 'When to take the medication and for how long', 'Special administration instructions', 'Potential side effects', 'Interactions with other meds (Rx & OTC), food and alcohol', 'What to do if dose is missed', 'How to know that medication is working', 'Proper storage', and 'Refills - when and how to request'. The 'Finalize Counseling' button is highlighted with a red box at the bottom right.

### Counseling Accepted by Agent

When a request for counseling is accepted by an agent on behalf of the patient, call up the **Counseling** screen for the Rx and do the following:

- Select **Yes** when asked ‘**Does the Patient accept counseling?**’
- Select **Someone Else** when asked ‘**Counseling is received by?**’.

**NOTE:** Only persons 18 years of age and older can accept counseling on someone’s behalf.

- If the agent is a Kroll patient, perform a patient search in the **Select Agent** field. If the agent is not a Kroll patient, select **<Freeform Agent Name>** from the **Select Agent** menu and enter the agent’s name in the **Last Name** and **First Name** fields. If the patient already has family members linked to their profile, those family members’ names will appear in the dropdown menu.

4. Select a relationship from the **Relationship to Patient** dropdown menu and click **Next**.

**NOTE:** If the selected agent is a Kroll patient, the next time the same agent accepts counseling on the patient's behalf, the relationship to the patient will be retained.

5. Select **In Person** or **By Phone** when asked 'What is the Counseling Method?'
6. Place a checkmark next to the counseling points you want to cover during patient counseling. Enter any additional information in the text box that appears next to each counseling point.
7. If you want to perform patient counseling at a later date, click **Save for Later**.
8. When you are finished, click **Finalize Counseling**. If electronic signatures are enabled, you will be prompted for your signature.

The screenshot displays the 'Counseling' interface in a software application. At the top, there is a menu bar with 'File', 'Edit', 'Utilities', 'NH', 'Cards', 'Session', and 'Help', along with 'Version 10'. Below the menu is a toolbar with buttons for 'F3 - Patient', 'F5 - Drug', 'F7 - Doctor', 'F9 - Workflow', 'F11 - Drop-off', 'F12 - New Rx', and 'Alt-X - Start'.

The main area is titled 'Counseling' and contains several sections:

- Header:** 'Rx Number' 1000013, 'Reason' New Rx, and 'Comments'.
- Navigation:** Tabs for 'Counseling', 'Hardcopy', 'Rx', 'Financial', 'Rx Images', 'Workflow', and 'Packaging'.
- Patient Information:** Name 'Doe, John', DOB '06/04/1980', Age '35', Height '180 cm', Weight '70', Gender 'Male'. Allergies (1): 'Adenosine Analogues'. Conditions (1): 'After-cataract'.
- Medication Details:** Brand 'Accupril', Strength '40mg', Generic 'Quinapril Hydrochlorid', DIN '01947699', Pack '90 Form TAB', Schedule '1'.
- Doctor Information:** Name 'Dr. Test, Test', Specialty 'Dental Hygienis', Lic # '1234567', Ref ID '00', Loc 'Office', Ph '(555) 555-5555'.
- Quantity and Supply:** Qty '50', Auth Qty '50', Days Supply '10', Rem Qty '0', O/W 'Written', Ago.
- Instructions:** 'TAKE 1 TABLET ONCE DAILY'.
- Counseling Method:** 'Accepted' Agent, 'By' 'Agent', 'Method' 'In Person'.
- Agent Selection:** Agent 'Smith, John (Brother)', Last Name 'Smith', First Name 'John', Relationship to Patient 'Brother'.
- Counseling Points:**
  - Have you taken this medication before: Yes
  - What the medication is for: Diabetics
  - How to take the medication: One tab per day
  - When to take the medication and for how long
  - Special administration instructions
  - Potential side effects
  - Interactions with other meds (Rx & OTC), food and alcohol
  - What to do if dose is missed
  - How to know that medication is working
  - Proper storage
  - Refills - when and how to request
- Comments:** A text area for additional notes.
- Buttons:** 'Save for Later' (with a red X icon) and 'Finalize Counseling' (highlighted with a red box).
- Right Panel:** A sidebar with sections:
  - View:** Clinical Interactions, Patient Charting, Patient Documents.
  - Profile:** All Rxs (4), Active Rxs, Pricing Profile, Not Disp/OTC Profile, Therapeutic Equivalents.
  - Rx:** Follow Up.

## Counseling Rejected by Patient/Agent

If the patient rejected the counseling request, call up the **Counseling** screen for the Rx and do the following:

1. Select **No** when asked 'Does the Patient accept counseling?'
2. Select **Patient** or **Someone Else** when asked 'Counseling was rejected by?'
3. Select **In Person** or **By Phone** when asked 'What is the rejection method?'
4. Select a rejection reason from the **Please, enter a reason** dropdown menu and enter any comments in the **Comments** field.
5. When you are finished, click **Finalize Counseling**.

The screenshot shows the 'Counseling' screen for a new prescription. The interface includes a menu bar at the top with options like 'File', 'Edit', 'Utilities', 'NH', 'Cards', 'Session', and 'Help'. Below the menu bar are function keys: 'F3 - Patient', 'F5 - Drug', 'F7 - Doctor', 'F9 - Workflow', 'F11 - Drop-off', 'F12 - New Rx', and 'Alt-X - Start'. The main area is titled 'Counseling' and contains several sections:

- Header:** Rx Number: 1000015, Reason: New Rx, Comments field.
- Navigation:** Counseling, Hardcopy, Rx, Financial, Rx Images, Workflow, Packaging.
- Patient Information:** Smith, John, 01/01/1941, 74, Height, Weight, Gender: Male, Family MD.
- Allergies (2):** Dayquil; Peridex.
- Conditions (1):** Arthritis in mycoses, lower leg.
- Medication Details:** Brand: Abilify, 15mg; Generic: Aripiprazole, DIN: 02322404; Pack: 30 Form TAB, Schedule 1.
- Doctor Information:** Dr. Test, Test, Dental Hygienist, Lic #: 1234567, Ref ID: 00, Loc: Office, Ph: (555) 555-5555.
- Quantity and Supply:** Qty: 60, Auth Qty: 60, 1; Days Supply: 30, Rem Qty: 0.
- Instructions:** O/W: Written, Ago; TAKE 1 TABLET ONCE DAILY.
- Reason Selection:** A dropdown menu with 'Patient Refused' selected.
- Comments:** A large text area for entering comments.
- Buttons:** 'Back' and 'Finalize Counseling' (highlighted with a red box).
- Footer:** 'Save for Later' button.

If the patient requests Rx counseling at a later date a new counseling record for the Rx can be created either from the Alt-X-Start screen or from the patient profile, as note in Method 3: From the Patient Profile.

## Counseling Follow-up

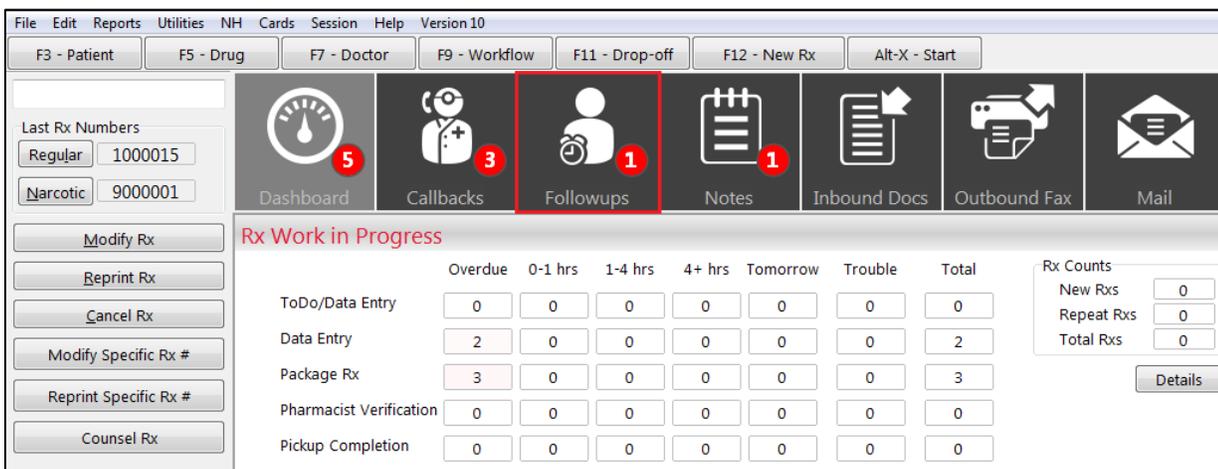
1. Prior to finalizing the counseling session, select **Follow Up** from the right navigation pane on the **Counseling** screen. The **Follow Up - Rx Counseling** window will appear.
2. Enter the number of days you want to lapse before counseling is performed again, or enter the next counseling date in the date field. Click **Save**.



3. If you do not want to perform a counseling follow-up, select **Do NOT Follow-Up** and click **Save**.



4. Click **Finalize Counseling**.
5. When it is time to document the follow-up, select the **Followups** tile from the **Alt-X Start** screen.



6. Double-click the Rx record.

7. Complete the **Counseling** steps noted above.
8. When you are finished, click **Finalize Counseling**.

## Printing and Scanning the Prescription Counseling Worksheet

If, for some reason, documenting Rx counseling cannot be completed on-screen, users can print a Prescription Counseling Worksheet, complete it manually, and scan it into Kroll using the document scan utility.

### Method 1: From the Counseling Items screen

1. From the **Alt-X Start** screen, click the **Workflow** button or press **F9** on your keyboard.
2. Select **Rx Counseling** from the right navigation pane.

The screenshot shows the 'Counseling Items' screen in a software application. At the top, there is a menu bar with 'File', 'Edit', 'Utilities', 'NH', 'Workflow', 'Cards', 'Session', and 'Help', along with 'Version 10'. Below the menu bar are several function buttons: 'F3 - Patient', 'F5 - Drug', 'F7 - Doctor', 'F9 - Workflow', 'F11 - Drop-off', 'F12 - New Rx', and 'Alt-X - Start'. The main area contains a table with columns: '#', 'RxNum', 'Fill Date', 'Patient', 'Drug', 'Type', 'Reason', and 'Comment'. The first row is highlighted in blue. To the right of the table is a 'Workflow Actions' pane with a 'Refresh' button and a list of categories: 'Rx's To Do', 'Rx's In Progress', 'Pending Adjudication (2)', 'Trouble (0)', 'Rx Counseling (7)', and 'Medication Reviews (0)'. The 'Rx Counseling (7)' item is highlighted with a red box.

#	RxNum	Fill Date	Patient	Drug	Type	Reason	Comment
1	1000009	29/09/2015	Doe, John	Mylan-Atenolol 50mg	Auto	No Reason Indicated	
2	1000012	16/10/2015	Doe, John	Apo-Oxybutynin 5mg	Auto	New Rx	
3	1000013	16/10/2015	Doe, John	Accupril 40mg	Auto	New Rx	
4	1000003	15/06/2015	Patient, Test	Acyclovir 200mg	Auto	No Reason Indicated	
5	1000006	15/06/2015	Patient, Test	Gummies Vitamins	Auto	No Reason Indicated	
6	1000014	16/10/2015	Patient, Test	Aerius 5mg	Auto	New Rx	
7	1000015	16/10/2015	Smith, John	Abilify 15mg	Auto	New Rx	

3. Highlight the Rx, right-click, and select **Print Counseling Worksheet**.

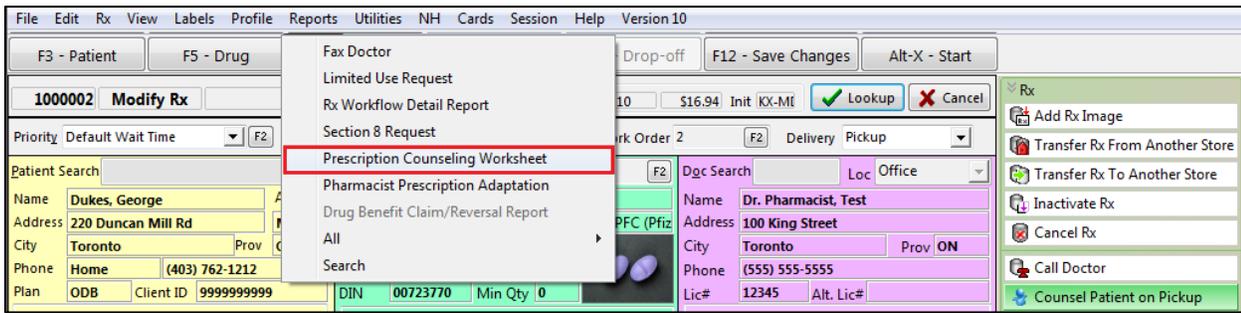
This screenshot is similar to the previous one, but a context menu is open over the first row of the table. The menu items are: 'Refresh (Ctrl+R)', 'Call Up Rx(s) (F)', 'Print Counseling Worksheet' (highlighted with a red box), 'Select All (Ctrl+A)', 'Change Columns', and 'Make these the Default Columns'. The 'Rx Counseling (7)' item in the right-hand pane is also highlighted in green.

A Prescription Counseling Worksheet like the one below will generate:

Prescription Counseling Worksheet			
RxNum <b>1000009</b>	Counseling@date	Method	Counseling <input type="checkbox"/> Accepted <input type="checkbox"/> Rejected
OrigRxNum <b>1000009</b>	AgentName	AgeRelationship	
Patient <b>Doe, John</b> 100 Yonge St Toronto, ON M1K 4X5 Home: (222) 222-2222	Drug <b>Mylan-Atenolol</b> Atenolol DIN: 02146894 Form: TAB Mfr: MYL Schedule: 1	Prescriber <b>Test, Test</b> 220 Duncan Mills Road Toronto, ON (555) 555-5555	
<p><b>Counseling Points Reviewed</b></p> <p><input type="checkbox"/> Have you taken this medication before _____</p> <p>_____</p> <p><input type="checkbox"/> What the medication is for _____</p> <p>_____</p> <p><input type="checkbox"/> How to take the medication _____</p> <p>_____</p> <p><input type="checkbox"/> When to take the medication and for how long _____</p> <p>_____</p> <p><input type="checkbox"/> Special administration instructions _____</p> <p>_____</p> <p><input type="checkbox"/> Potential side effects _____</p> <p>_____</p> <p><input type="checkbox"/> Interactions with other meds (Rx &amp; OTC), food and alcohol _____</p> <p>_____</p> <p><input type="checkbox"/> What to do if dose is missed _____</p> <p>_____</p> <p><input type="checkbox"/> How to know that medication is working _____</p> <p>_____</p> <p><input type="checkbox"/> Proper storage _____</p> <p>_____</p> <p><input type="checkbox"/> Refills - when and how to request _____</p> <p>_____</p> <p><input type="checkbox"/> Effect on other conditions (if applicable) _____</p> <p>_____</p> <p><input type="checkbox"/> Self-monitoring techniques _____</p> <p>_____</p> <p>Comments: _____</p> <p>_____</p> <p>_____</p>			
Counseled by: _____		Signature: _____	Date: _____
Printed on: 16/10/2015 12:05:40		Page 1 	

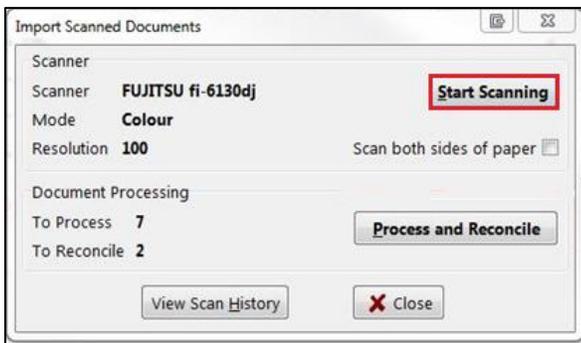
### Method 2: From the F12 screen

1. Call up the Rx in modify mode.
2. Go to **Reports > Prescription Counseling Worksheet**.



Once you have generated the **Prescription Counseling Worksheet**, complete it by hand. The completed **Prescription Counseling Worksheet** must be scanned so the counseling record can be finalized.

3. Go to Utilities > Printed Document Scan/Import.
4. The Import Scanned Documents window will appear. Place the Prescription Counseling Worksheet into the scanner and click Start Scanning.

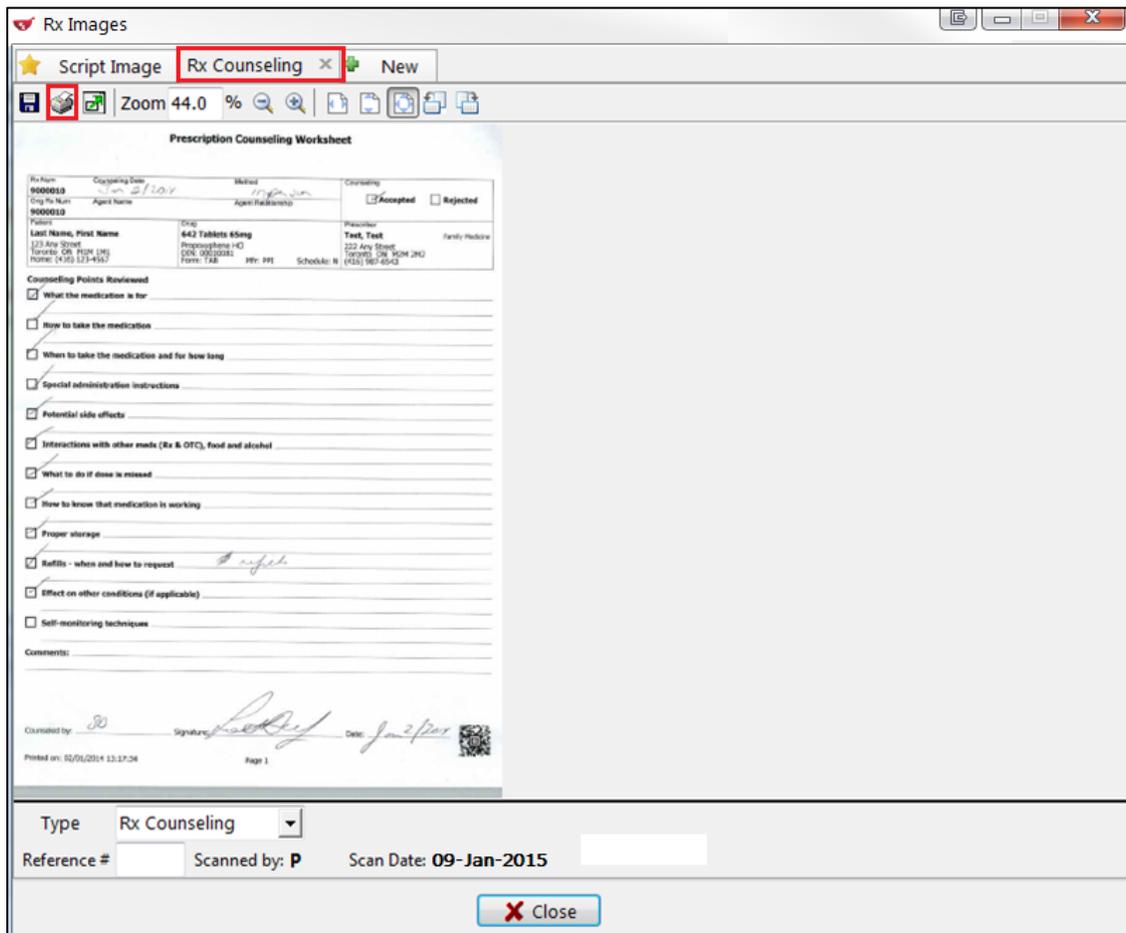


5. Complete the scan document process as per normal procedures. The counseling record will no longer appear in the **Counseling Items** screen.

### Viewing Scanned Prescription Counseling Worksheets

1. Call up the Rx in **Modify** mode.
2. Select **Rx Images** from the right navigation pane. The **Rx Images** window will appear.

3. Click the **Rx Counseling** tab.



6. If you need to reprint the worksheet, click the **Print** icon in the upper left corner of the **Rx Images** window.
7. When you are finished, click Close.

### Viewing Counseling History

#### Method 1: From the Patient Profile

1. Call up a patient.
2. Select **Rx Counseling History** from the right navigation pane.

3. Select Accepted, Rejected or All from the Type dropdown menu.

Counseling History - Test Patient

Type: <All>

Counseling (2) <span style="float: right;">F2-View</span>				
Date	Pharmacist	RxNum	Drug Name	Type
22/08/2015	Marco	1000904	Crestor 5mg	Rejected
22/08/2015	Marco	1000937	Amaryl 1mg	Accepted

4. Click **F2-View** for a detailed view of the counseling history.
5. Double-click an Rx. The **Counseling Information** window will appear displaying the counseling details for the Rx.

Counseling Information

Rx Num: 1000937    Counseling Date: 22-Aug-2015    Method: In Person    Counseling: Accepted

Orig Rx Num: 1000937

Patient: Test, Patient	Brand: Amaryl 1mg	Doctor: Test, Doctor
Address: [Empty]	Generic: Glimepiride AVP	Address: kroll Default Address Office
City: [Empty] Prov: ON	DIN: 02245272 Form: TAB Sched: 1	City: North York Prov: ON

**Counseling Detail**

Counseling Points Reviewed

- What the medication is for
- How to take the medication
- When to take the medication and for how long
- Special administration instructions
- Potential Side Effects
- Interactions with other meds (Rx & OTC), food and alcohol
- What to do if dose is missed
- How to know that medication is working
- Proper Storage
- Refills - when and how to request
- Effect on other conditions (if applicable)
- Self-Monitoring Techniques
- test

Notes Added: [Empty]

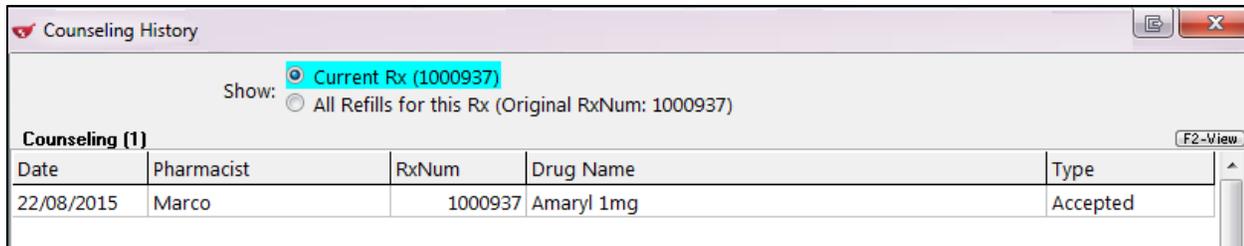
Counseled by: Marco    Electronic Signature: No

Comments: this is a comment

6. To print a Prescription Counseling Log, click **Print**. Set the appropriate parameters and click **Print**.
7. Click **Close** to close the **Counseling Information** window.

## Method 2: From the Rx Screen

1. Call up an Rx.
2. Select **Rx Counseling History** from the right navigation pane.
3. Select **Current Rx** or **All Refills for this Rx**.



The screenshot shows a window titled "Counseling History". At the top, there are two radio buttons under the label "Show:". The first radio button is selected and labeled "Current Rx (1000937)". The second radio button is labeled "All Refills for this Rx (Original RxNum: 1000937)". Below this, there is a table with the following data:

Counseling (1)					F2-View
Date	Pharmacist	RxNum	Drug Name	Type	
22/08/2015	Marco	1000937	Amaryl 1mg	Accepted	

4. Click **F2-View** button for a detailed view of the counseling history.
5. Click **Close** to exit from the **Counseling Information** screen.

**NOTE:** Counseling records that were finalized by scanning completed-by-hand Prescription Counseling Worksheet will have the **Type** set to **Paper**.