

Documenting Rx Counseling

September 2019

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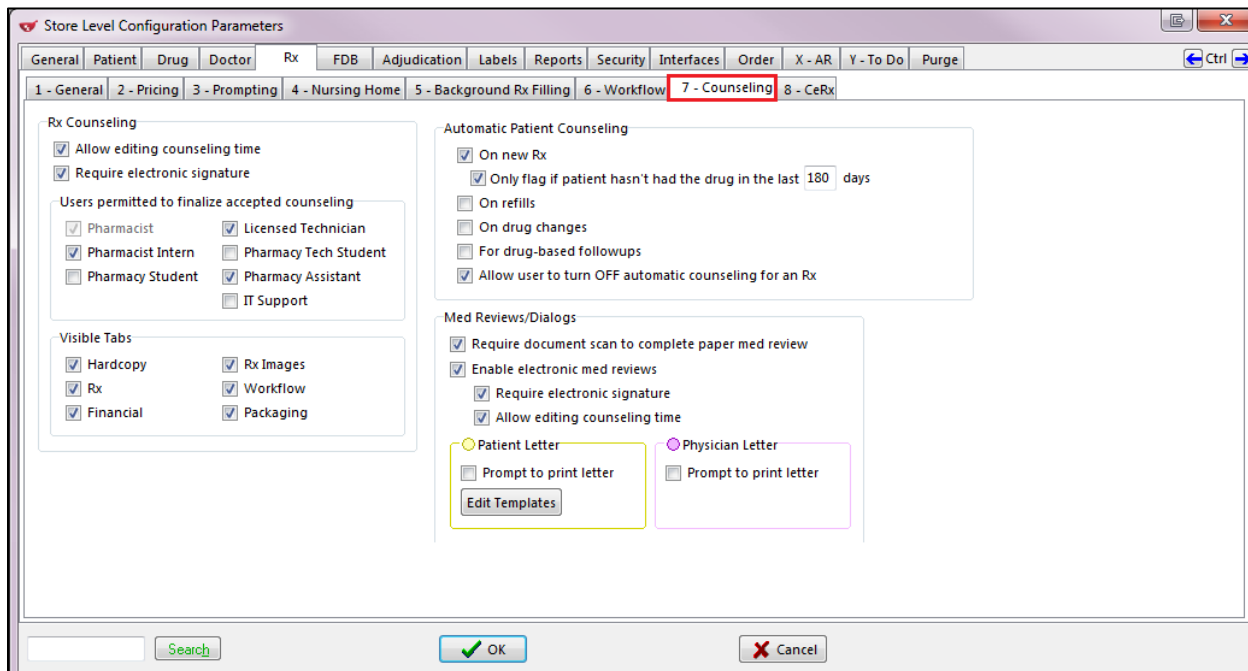
Documenting Rx Counseling

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**.



Store Level Configuration Parameters

General Patient Drug Doctor Rx FDB Adjudication Labels Reports Security Interfaces Order X - AR Y - To Do Purge

1 - General 2 - Pricing 3 - Prompting 4 - Nursing Home 5 - Background Rx Filling 6 - Workflow 7 - Counseling 8 - CeRx

Rx Counseling

- ☒ Allow editing counseling time
- ☒ Require electronic signature

Users permitted to finalize accepted counseling

- ☒ Pharmacist
- ☒ Licensed Technician
- ☒ Pharmacist Intern
- ☐ Pharmacy Tech Student
- ☐ Pharmacy Student
- ☒ Pharmacy Assistant
- ☐ IT Support

Visible Tabs

- ☒ Hardcopy
- ☒ Rx Images
- ☒ Rx
- ☒ Workflow
- ☒ Financial
- ☒ Packaging

Automatic Patient Counseling

- ☒ On new Rx
 - ☒ Only flag if patient hasn't had the drug in the last 180 days
- ☐ On refills
- ☐ On drug changes
- ☐ For drug-based followups
- ☒ Allow user to turn OFF automatic counseling for an Rx

Med Reviews/Dialogs

- ☒ Require document scan to complete paper med review
- ☒ Enable electronic med reviews
 - ☒ Require electronic signature
 - ☒ Allow editing counseling time

Patient Letter

- ☐ Prompt to print letter
-

Physician Letter

- ☐ Prompt to print letter

Search OK Cancel

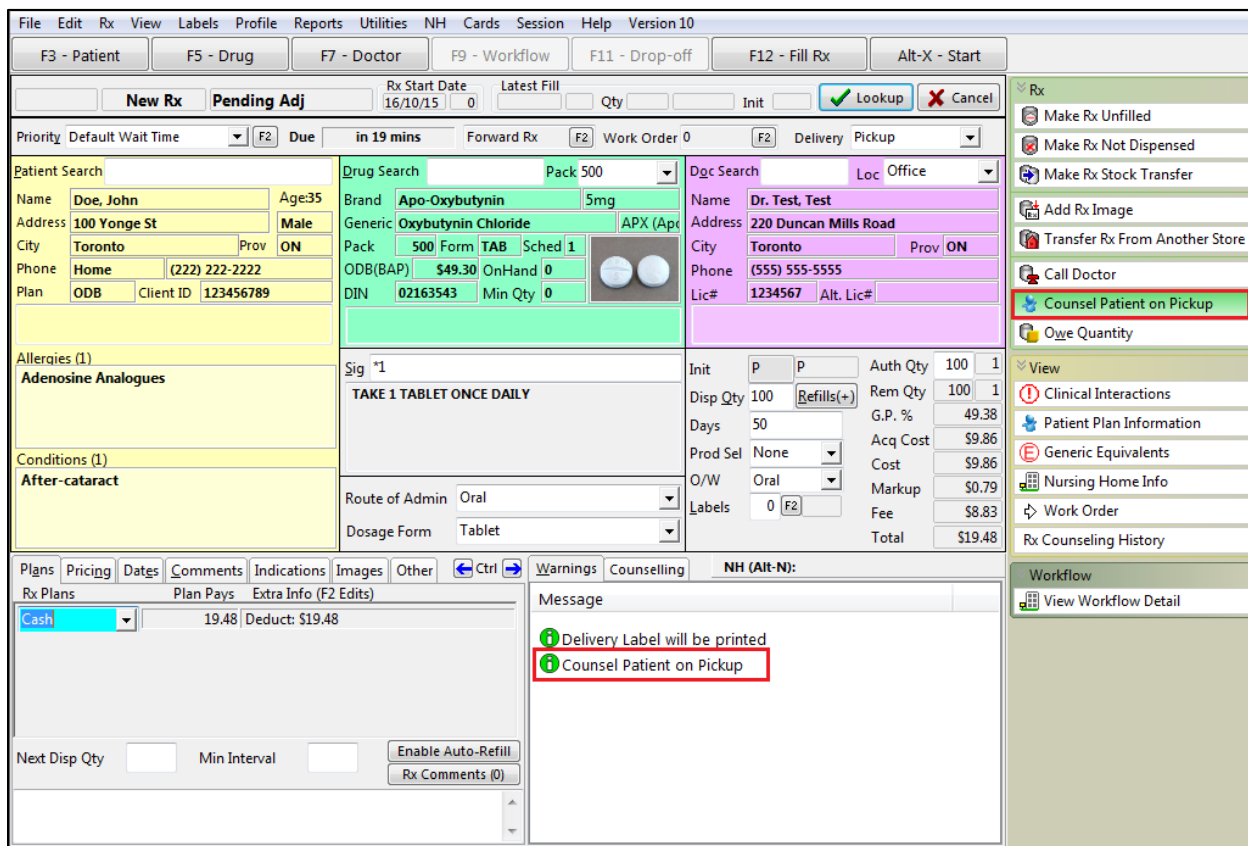
- **Rx Counseling:** allows you to control whether or not counseling times can be edited and to set up electronic signatures;
- **Allow editing counseling time:** allows you to record the amount of time it took to complete the counseling session;
- **Require Electronic Signature:** for this option to 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 'F12 - Fill Rx' screen in the Kroll software. The interface includes a top menu bar, a toolbar with buttons like 'New Rx', 'Pending Adj', and 'Lookup', and a main data entry area. On the right, a navigation pane lists various actions, with 'Counsel Patient on Pickup' highlighted in red. At the bottom, a message box displays a warning: 'Delivery Label will be printed' and 'Counsel Patient on Pickup', with the latter also highlighted in red.

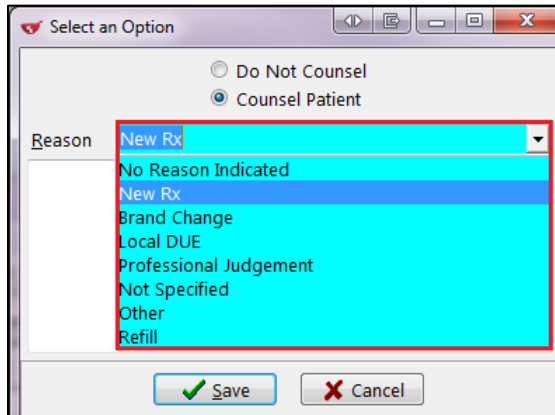
Patient Search	Drug Search	Dgc Search
Name: Doe, John Address: 100 Yonge St City: Toronto Phone: (222) 222-2222 Plan: ODB Client ID: 123456789	Brand: Apo-Oxybutynin 5mg Generic: Oxybutynin Chloride APX (Ap) Pack: 500 Form TAB Sched 1 ODB(BAP): \$49.30 OnHand 0 DIN: 02163543 Min Qty 0	Name: Dr. Test, Test Address: 220 Duncan Mills Road City: Toronto Phone: (555) 555-5555 Lic#: 1234567 Alt. Lic#

Plans	Pricing	Dates	Comments	Indications	Images	Other
Cash	19.48	Deduct: \$19.48				

Next Disp Qty: Min Interval: Enable Auto-Refill: Rx Comments (0)

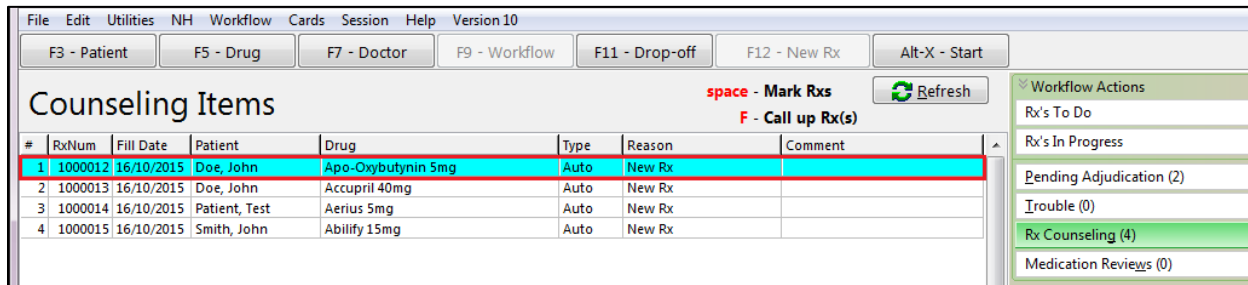
Message:
 1 Delivery Label will be printed
 1 Counsel Patient on Pickup

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:

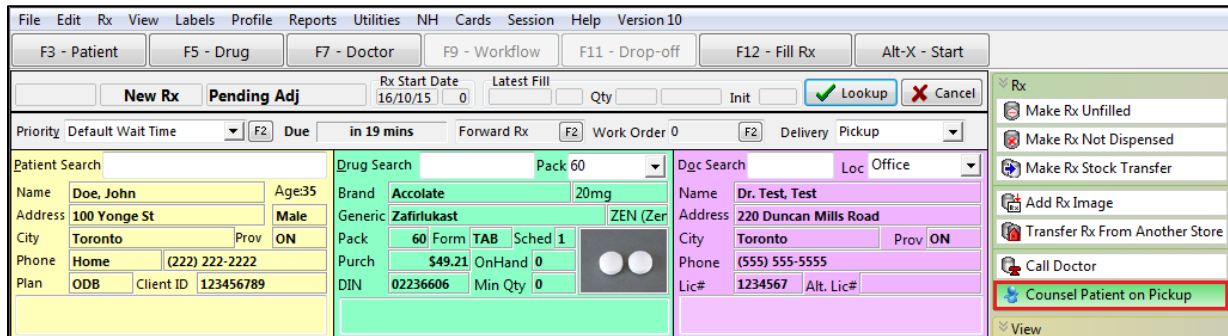


#	RxNum	Fill Date	Patient	Drug	Type	Reason	Comment
1	1000012	16/10/2015	Doe, John	Apo-Oxybutynin 5mg	Auto	New Rx	
2	1000013	16/10/2015	Doe, John	Accupril 40mg	Auto	New Rx	
3	1000014	16/10/2015	Patient, Test	Aerius 5mg	Auto	New Rx	
4	1000015	16/10/2015	Smith, John	Abilify 15mg	Auto	New Rx	

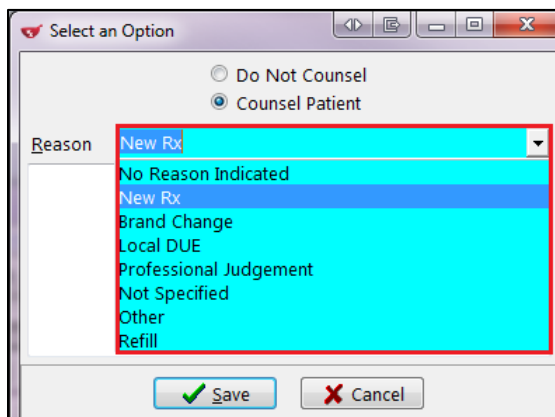
Manual Rx Counseling

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.



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



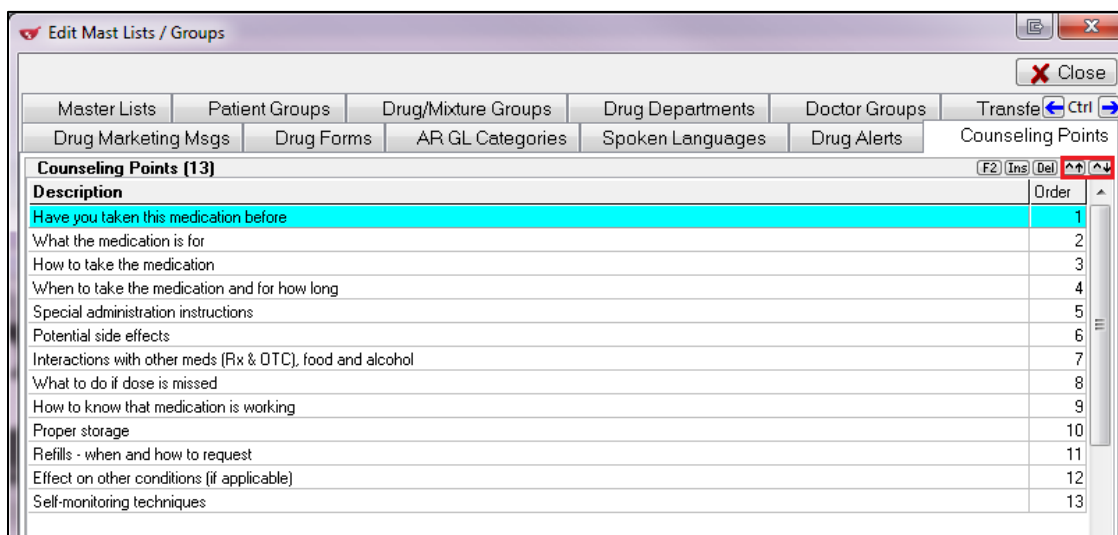
A counseling record will add to the **Counseling Items** list.

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.

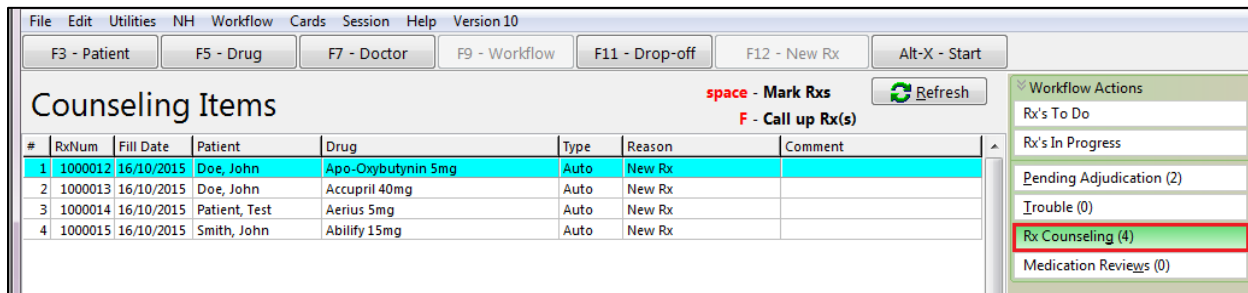


Description	Order
Have you taken this medication before	1
What the medication is for	2
How to take the medication	3
When to take the medication and for how long	4
Special administration instructions	5
Potential side effects	6
Interactions with other meds (Rx & OTC), food and alcohol	7
What to do if dose 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 the 'Counseling Items' table and the 'Workflow Actions' pane on the right.

#	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	

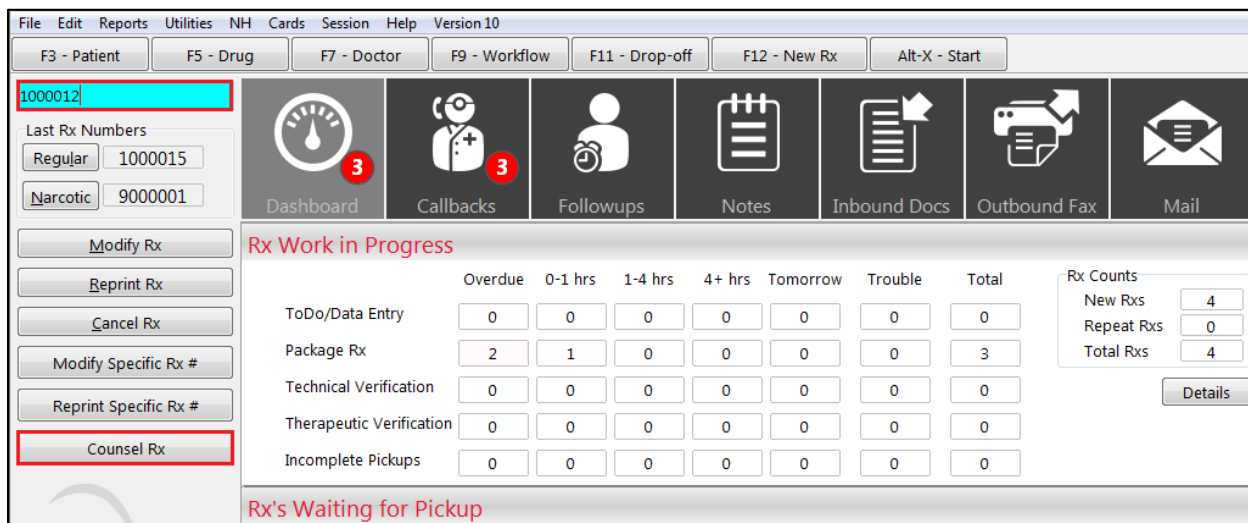
The 'Workflow Actions' pane on the right shows the following items:

- Rx's To Do
- Rx's In Progress
- Pending Adjudication (2)
- Trouble (0)
- Rx Counseling (4)** (highlighted with a red box)
- Medication Reviews (0)

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 the search field and the 'Counsel Rx' button highlighted.

The search field contains the Rx number **1000012**.

The 'Last Rx Numbers' section shows:

- Regular: 1000015
- Narcotic: 9000001

The 'Counsel Rx' button is highlighted with a red box.

The 'Rx Work in Progress' section shows the following data:

	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 'Rx Counts' section shows:

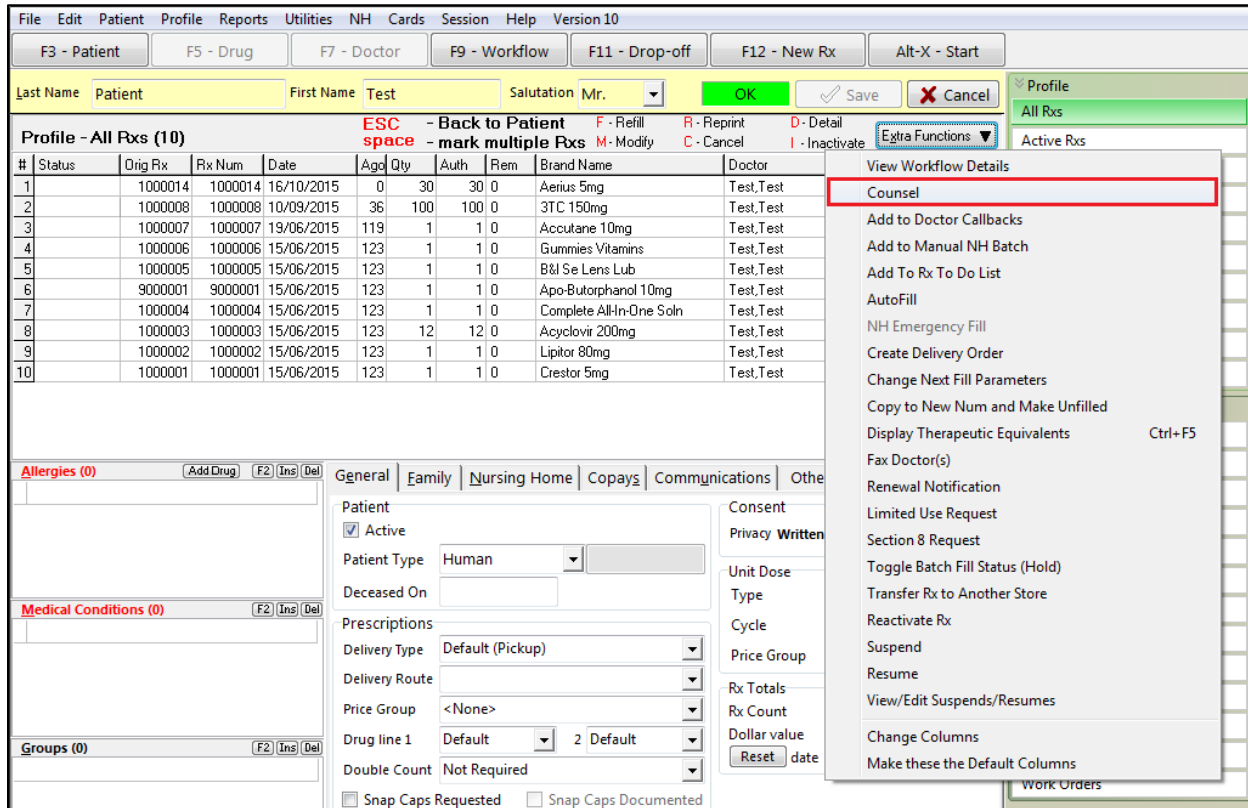
- New Rxs: 4
- Repeat Rxs: 0
- Total Rxs: 4

The 'Details' button is located below the Rx Counts section.

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**.



The screenshot shows the TELUS Health software interface. At the top, there's a menu bar with options like File, Edit, Patient, Profile, Reports, Utilities, NH, Cards, Session, and Help. Below the menu bar, there are tabs for Patient, Drug, Doctor, Workflow, Drop-off, New Rx, and Start. The main area displays the Patient Profile for a patient named 'Test'. The 'All Rx's' tab is selected in the right navigation pane. A list of 10 prescriptions is shown, including details like Status, Orig Rx, Rx Num, Date, Qty, Auth, Rem, Brand Name, and Doctor. The 'Extra Functions' menu is open, and the 'Counsel' option is highlighted.

#	Status	Orig Rx	Rx Num	Date	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

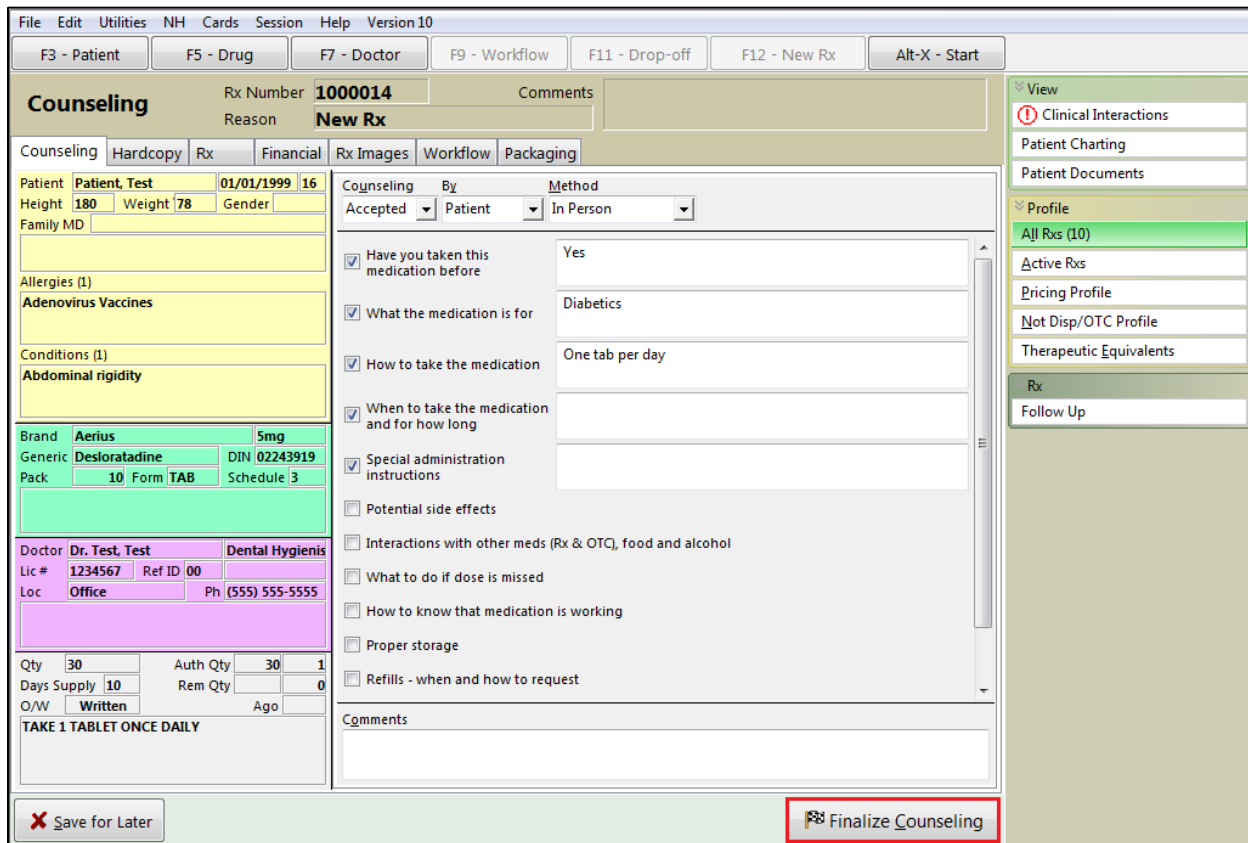
The **Counseling** screen will appear.

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 shows the 'Counseling' screen in the TELUS Health software. The top menu bar includes '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 divided into several sections:

- Counseling Header:** Displays 'Rx Number 1000014' and 'Reason New Rx'. There are tabs for 'Counseling', 'Hardcopy', 'Rx', 'Financial', 'Rx Images', 'Workflow', and 'Packaging'.
- Patient Information:** Includes fields for 'Patient, Test', '01/01/1999', '16', 'Height 180', 'Weight 78', 'Gender', 'Family MD', 'Allergies (1): Adenovirus Vaccines', and 'Conditions (1): Abdominal rigidity'.
- Medication Details:** Shows 'Brand Aerius', 'Generic Desloratadine', 'DIN 02243919', 'Pack 10 Form TAB', and 'Schedule 3'.
- Doctor Information:** Includes 'Dr. Test, Test', 'Dental Hygienist', 'Lic # 1234567', 'Ref ID 00', 'Loc Office', and 'Ph (555) 555-5555'.
- Counseling Form:** 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'.
- Comments:** A text area for additional notes.
- Bottom Bar:** Includes a 'Save for Later' button and a 'Finalize Counseling' button, which is highlighted with a red box.
- Right Sidebar:** Contains a 'View' section with 'Clinical Interactions', 'Patient Charting', and 'Patient Documents'. Below this is a 'Profile' section with 'All Rxs (10)', 'Active Rxs', 'Pricing Profile', 'Not Disp/OTC Profile', and 'Therapeutic Equivalents'. At the bottom is an 'Rx' section with 'Follow Up'.

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?'

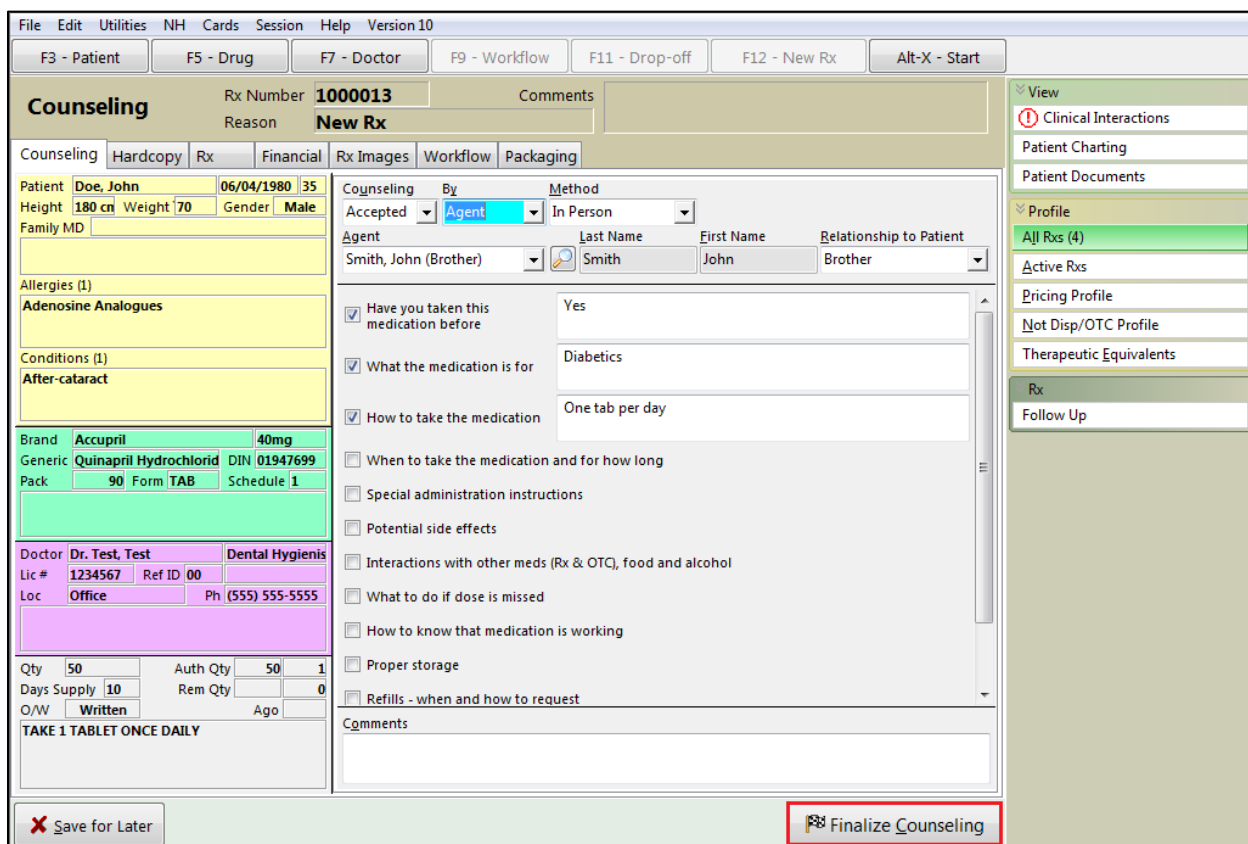
NOTE: Only persons 18 years of age and older can accept counseling on someone's behalf.

- 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.



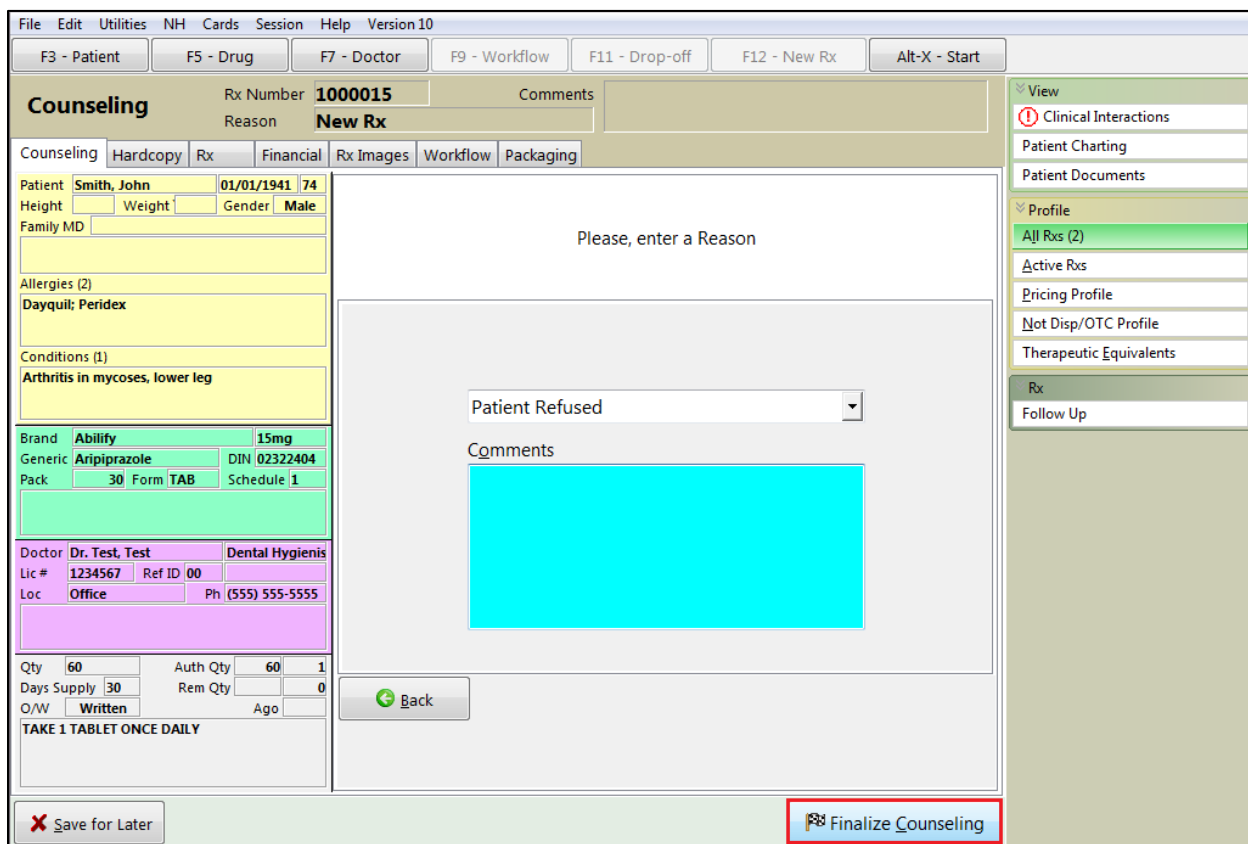
The screenshot displays the 'Counseling' window in the TELUS Health software. The interface includes a menu bar at the top with options like File, Edit, Utilities, NH, Cards, Session, and Help. Below the menu, there are tabs for different counseling methods: F3 - Patient, F5 - Drug, F7 - Doctor, F9 - Workflow, F11 - Drop-off, F12 - New Rx, and Alt-X - Start. The main area is divided into several sections:

- Header:** Displays 'Counseling' and 'Rx Number 1000013'. Below this, there are fields for 'Reason' (New Rx) and 'Comments'.
- Navigation:** A row of tabs includes Counseling, Hardcopy, Rx, Financial, Rx Images, Workflow, and Packaging. The 'Counseling' tab is currently selected.
- Patient Information:** Fields for Patient (Doe, John), Height (180 cm), Weight (70), Gender (Male), and Family MD. Below this, there are sections for Allergies (Adenosine Analogues) and Conditions (After-cataract).
- Medication Details:** Fields for Brand (Accupril), Generic (Quinapril Hydrochlorid), Pack (90 Form TAB), and Schedule (1). Below this, there are fields for Doctor (Dr. Test, Test), Lic # (1234567), Ref ID (00), Loc (Office), and Ph ((555) 555-5555).
- Counseling Method:** A section with 'Accepted' (Agent), 'By' (In Person), and 'Method' (In Person) dropdowns. Below this, there are fields for Agent (Smith, John (Brother)), Last Name (Smith), First Name (John), and Relationship to Patient (Brother).
- Counseling Points:** A list of checkboxes for various counseling points, including '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'.
- Comments:** A text area for entering comments.
- Footer:** A row of buttons includes 'Save for Later' and 'Finalize Counseling'.

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**.



Counseling Rx Number: 1000015 Comments

Reason: New Rx

Counseling | Hardcopy | Rx | Financial | Rx Images | Workflow | Packaging

Patient: Smith, John 01/01/1941 74
Height: Weight: Gender: Male
Family MD:
Allergies (2): Dayquil; Peridex
Conditions (1): Arthritis in mycoses, lower leg
Brand: Abilify 15mg
Generic: Aripiprazole DIN: 02322404
Pack: 30 Form TAB Schedule: 1
Doctor: Dr. Test, Test Dental Hygienist
Lic #: 1234567 Ref ID: 00
Loc: Office Ph: (555) 555-5555
Qty: 60 Auth Qty: 60 1
Days Supply: 30 Rem Qty: 0
O/W: Written Ago:
TAKE 1 TABLET ONCE DAILY

Please, enter a Reason

Patient Refused

Comments

Back

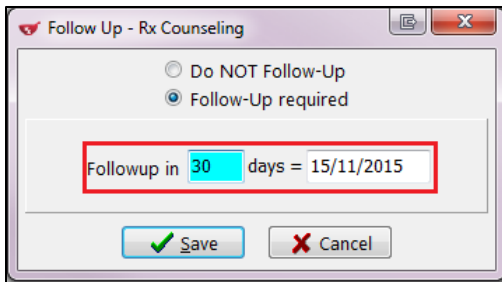
Save for Later Finalize Counseling

View
Clinical Interactions
Patient Charting
Patient Documents
Profile
All Rxs (2)
Active Rxs
Pricing Profile
Not Disp/OTC Profile
Therapeutic Equivalents
Rx
Follow Up

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**.

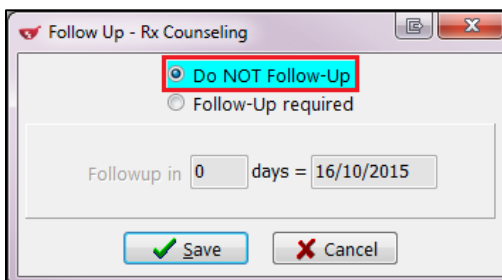


Follow Up - Rx Counseling

☐ Do NOT Follow-Up
☒ Follow-Up required

Followup in 30 days = 15/11/2015

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

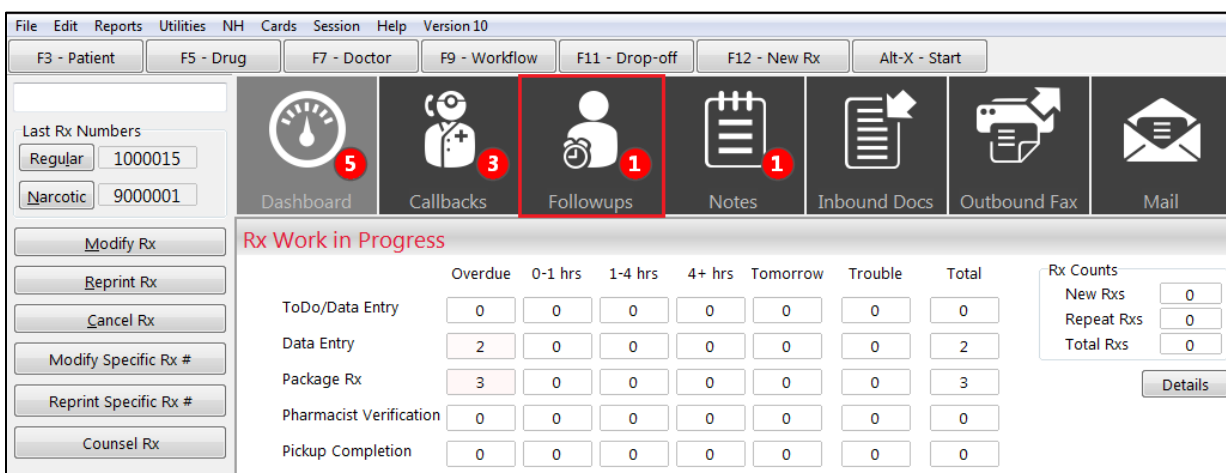


Follow Up - Rx Counseling

☒ Do NOT Follow-Up
☐ Follow-Up required

Followup in 0 days = 16/10/2015

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



File Edit Reports Utilities NH Cards Session Help Version 10

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

Last Rx Numbers
 Regular 1000015
 Narcotic 9000001

Modify Rx
 Reprint Rx
 Cancel Rx
 Modify Specific Rx #
 Reprint Specific Rx #
 Counsel Rx

Dashboard 5 Callbacks 3 **Followups 1** Notes 1 Inbound Docs Outbound Fax Mail

Rx Work in Progress

	Overdue	0-1 hrs	1-4 hrs	4+ hrs	Tomorrow	Trouble	Total
ToDo/Data Entry	0	0	0	0	0	0	0
Data Entry	2	0	0	0	0	0	2
Package Rx	3	0	0	0	0	0	3
Pharmacist Verification	0	0	0	0	0	0	0
Pickup Completion	0	0	0	0	0	0	0

Rx Counts
 New Rxs 0
 Repeat Rxs 0
 Total Rxs 0

Details

6. Double-click the Rx record.

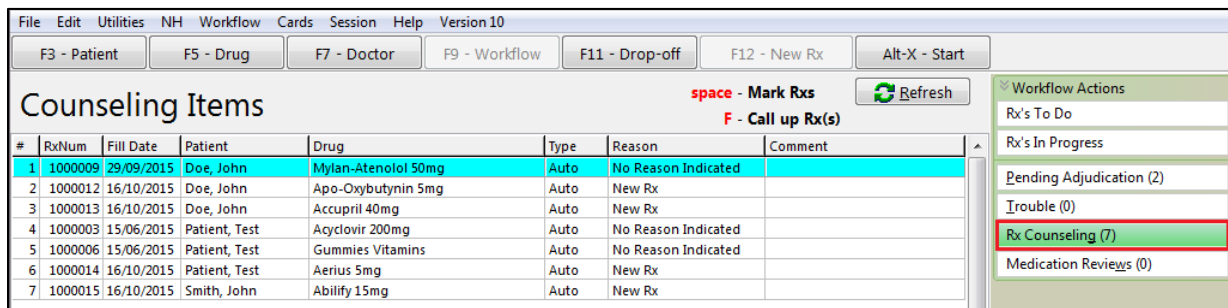
7. Complete the **Counseling** steps noted above.
8. When you are finished, click **Finalize Counseling**.

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

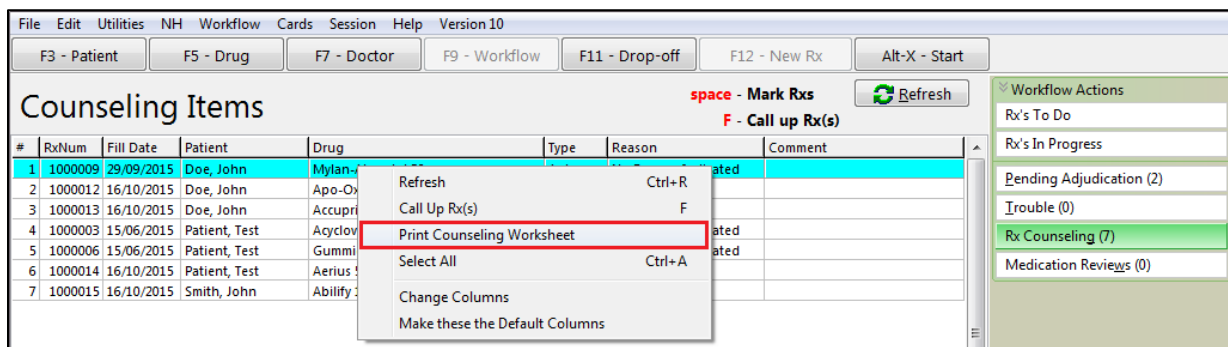
1. From the **Alt-X Start** screen, click the **Workflow** button or press **F9** on your keyboard.
2. Select **Rx Counseling** from the right navigation pane.



The screenshot shows the 'Counseling Items' window. The top menu bar includes 'File', 'Edit', 'Utilities', 'NH', 'Workflow', 'Cards', 'Session', 'Help', and 'Version 10'. Below the menu is a row of buttons: 'F3 - Patient', 'F5 - Drug', 'F7 - Doctor', 'F9 - Workflow', 'F11 - Drop-off', 'F12 - New Rx', and 'Alt-X - Start'. The 'F9 - Workflow' button is highlighted. The main area displays a table of counseling items. The right-hand pane shows 'Workflow Actions' with a list: '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**.



The screenshot shows the 'Counseling Items' window with a right-click context menu open over the first row of the table. The menu options 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 with a green box.

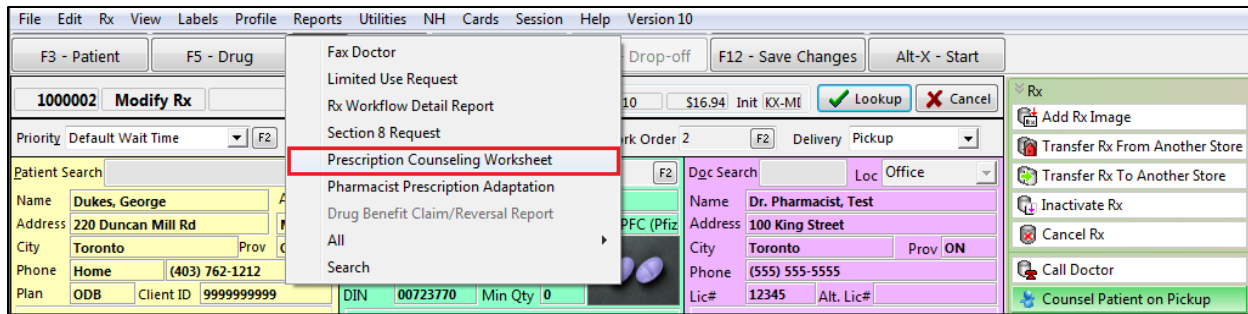
#	RxNum	Fill Date	Patient	Drug	Type	Reason	Comment
1	1000009	29/09/2015	Doe, John	Mylan-Atenolol 50mg	Auto	No Reason Indicated	
2	1000012	16/10/2015	Doe, John	Apo-Oxybutynin 5mg	Auto	New Rx	
3	1000013	16/10/2015	Doe, John	Accupril 40mg	Auto	New Rx	
4	1000003	15/06/2015	Patient, Test	Acyclovir 200mg	Auto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

A **Prescription Counseling Worksheet** like the one below will generate:

Prescription Counseling Worksheet			
RxNum 1000009	CounselingDate	Method	Counseling <input type="checkbox"/> Accepted <input type="checkbox"/> Rejected
OrigRxNum 1000009	AgentName	AgeRelationship	
Patient Doe, John 100 Yonge St Toronto, ON M1K 4Y5 Home: (222) 222-2222		Drug Mylan-Atenolol Atenolol DIN: 02146894 Form: TAB Mfr: MYL Schedule: 1	
		Prescriber Test, Test 220 Duncan Mills Road Toronto, ON (555) 555-5555	
Counseling Points Reviewed <input type="checkbox"/> Have you taken this medication before _____ <input type="checkbox"/> What the medication is for _____ <input type="checkbox"/> How to take the medication _____ <input type="checkbox"/> When to take the medication and for how long _____ <input type="checkbox"/> Special administration instructions _____ <input type="checkbox"/> Potential side effects _____ <input type="checkbox"/> Interactions with other meds (Rx & OTC), food and alcohol _____ <input type="checkbox"/> What to do if dose is missed _____ <input type="checkbox"/> How to know that medication is working _____ <input type="checkbox"/> Proper storage _____ <input type="checkbox"/> Refills - when and how to request _____ <input type="checkbox"/> Effect on other conditions (if applicable) _____ <input type="checkbox"/> Self-monitoring techniques _____ Comments: _____ _____ _____			
Counseled by: _____ Signature: _____ Date: _____			
Printed on: 16/10/2015 12:05:40 Page 1			

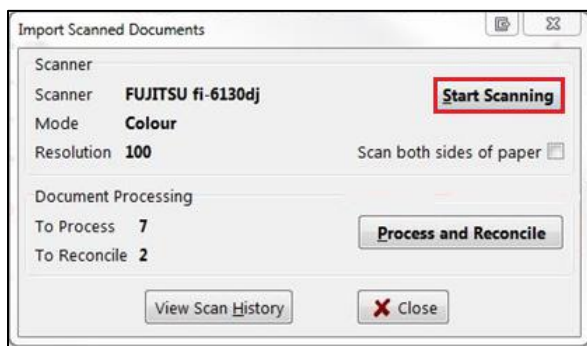
Method 2: From the F12 screen

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.

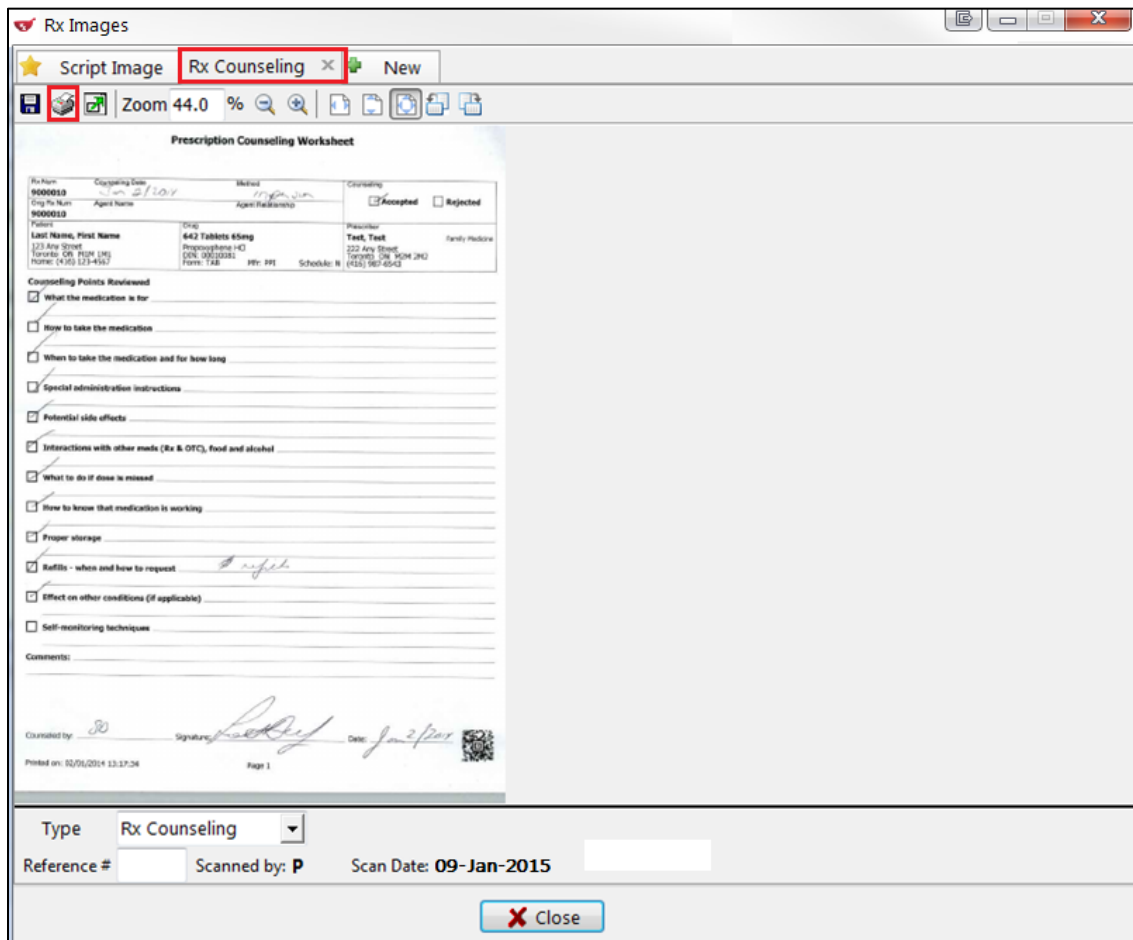


5. Complete the scan document process as per normal procedures. The counseling record will no longer appear in the **Counseling Items** screen.

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.

- Click the **Rx Counseling** tab.



Rx Images

Script Image **Rx Counseling** New

Zoom 44.0 %

Prescription Counseling Worksheet

Rx No. 9000010	Counseling Date 1/9/2015	Medication 642 Tablets 65mg	Counseling <input checked="" type="checkbox"/> Accepted <input type="checkbox"/> Rejected
Patient Last Name, First Name Toni, Toni 123 Any Street Toronto, ON M5M 1A5 Phone: (416) 123-4567	Address 222 Any Street Toronto, ON M5M 2H2 (416) 987-6543	Pharmacy Family Medicine	

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

Comments:

Counselor by: [Signature] Date: 1/9/2015

Printed on: 01/09/2015 13:37:26 Page 1

Type: Rx Counseling

Reference # Scanned by: P Scan Date: 09-Jan-2015

Close

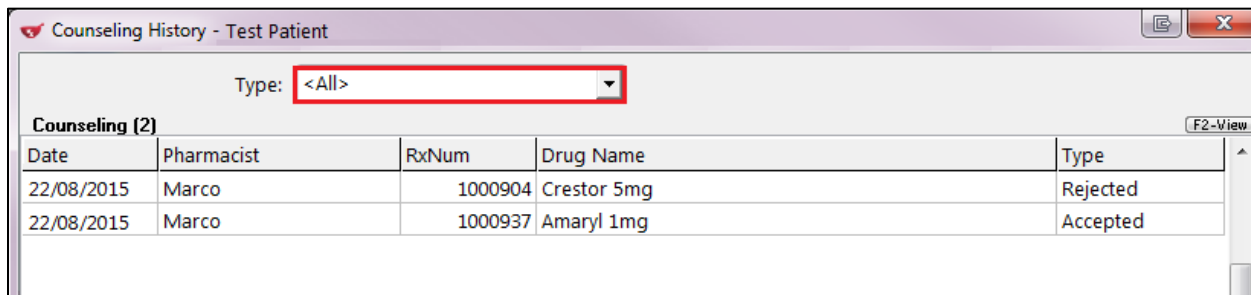
- If you need to reprint the worksheet, click the **Print** icon in the upper left corner of the **Rx Images** window.
- When you are finished, click Close.

Viewing Counseling History

Method 1: From the Patient Profile

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

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



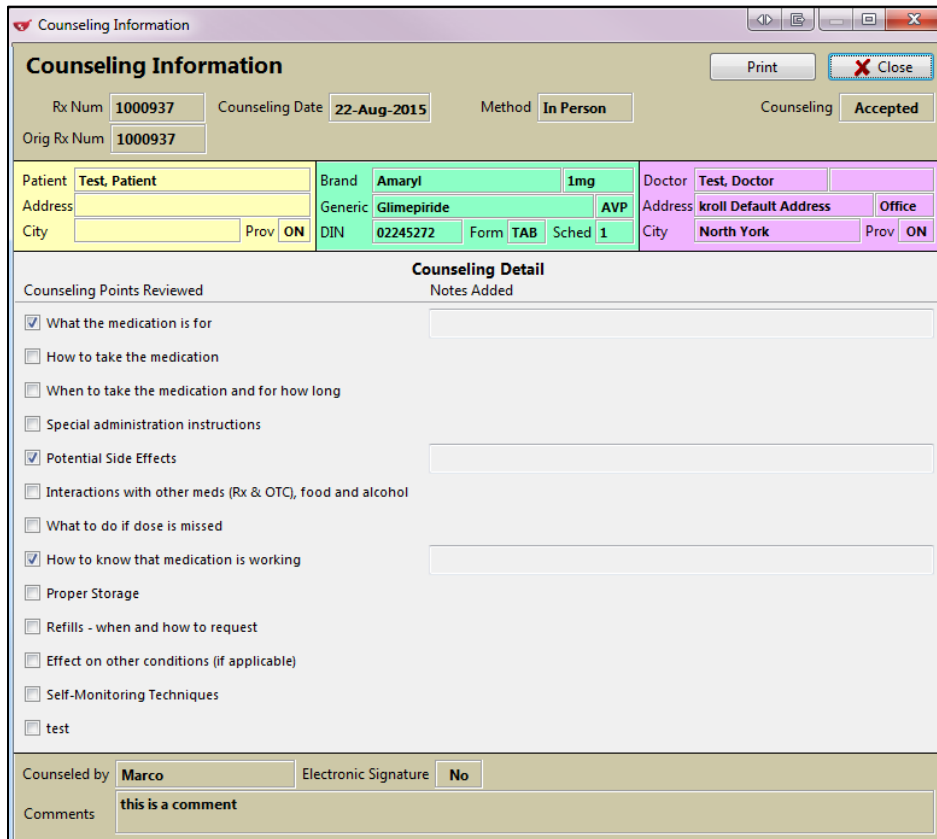
Counseling History - Test Patient

Type: <All>

Date	Pharmacist	RxNum	Drug Name	Type
22/08/2015	Marco	1000904	Crestor 5mg	Rejected
22/08/2015	Marco	1000937	Amaryl 1mg	Accepted

F2-View

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	Generic Glimepiride AVP	Address kroll Default Address Office
City Prov ON	DIN 02245272 Form TAB Sched 1	City North York Prov ON

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

Counseling Detail Notes Added

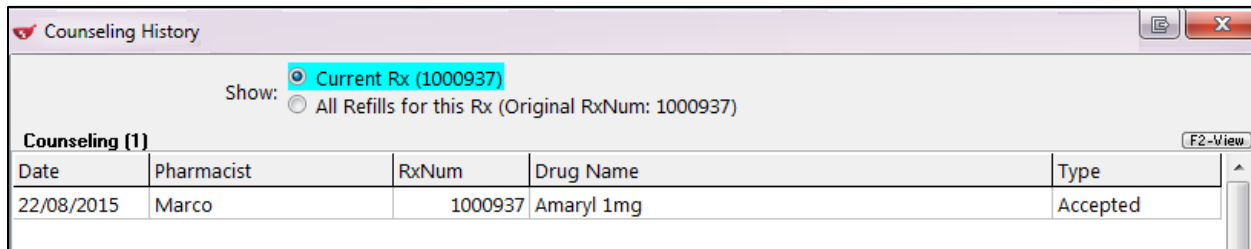
Counseled by Marco Electronic Signature No

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". Inside, 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 heading "Counseling (1)". The table has five columns: Date, Pharmacist, RxNum, Drug Name, and Type. The first row of data shows the date 22/08/2015, Pharmacist Marco, RxNum 1000937, Drug Name Amaryl 1mg, and Type Accepted. To the right of the table is a button labeled "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**.