



Sending and Receiving faxes

User Guide

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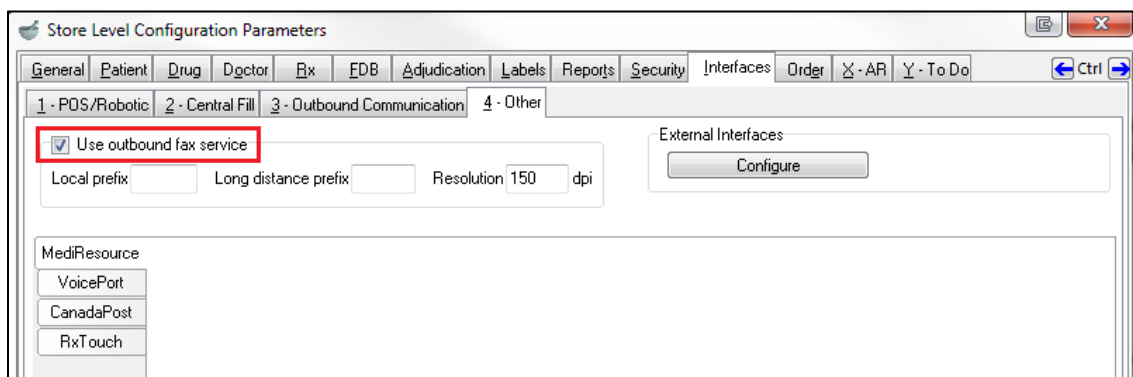
Sending and Receiving Faxes

This document explains the fax functionality in Kroll. It outlines the process for receiving incoming documents and sending outgoing faxes, as well how to send faxes as mail.

Configuration

This section explains how to enable the outbound fax service in Kroll so faxes can be sent and received.

1. From the **Alt-X Start** screen, go to **File > Configuration > Store > Interfaces > Other** and place a checkmark next to Use outbound fax service.



Store Level Configuration Parameters

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

1 - POS/Robotic 2 - Central Fill 3 - Outbound Communication 4 - Other

☒ Use outbound fax service

Local prefix Long distance prefix Resolution 150 dpi

External Interfaces

Configure

MediResource

VoicePort

CanadaPost

RxTouch

2. Click **OK** to close the **Store Level Configuration Parameters** screen.

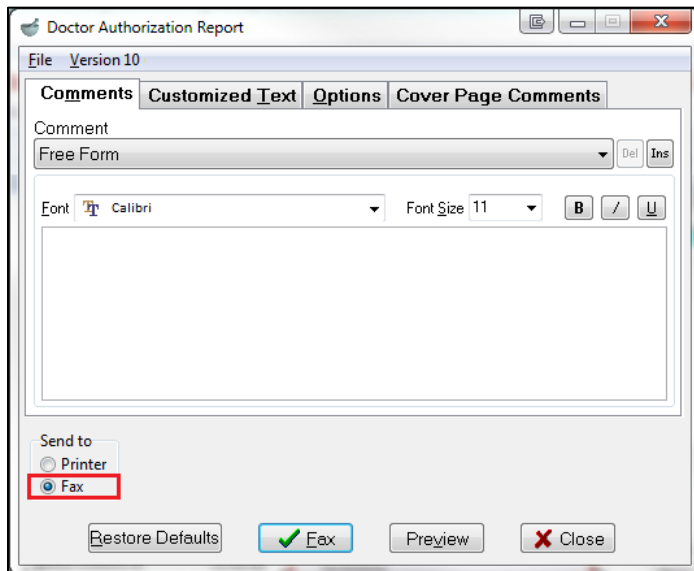
Fax Reports

Several reports can be faxed directly from the report form. This section explains how to fax Prescription Authorization Requests and Rx Transfer Reports.

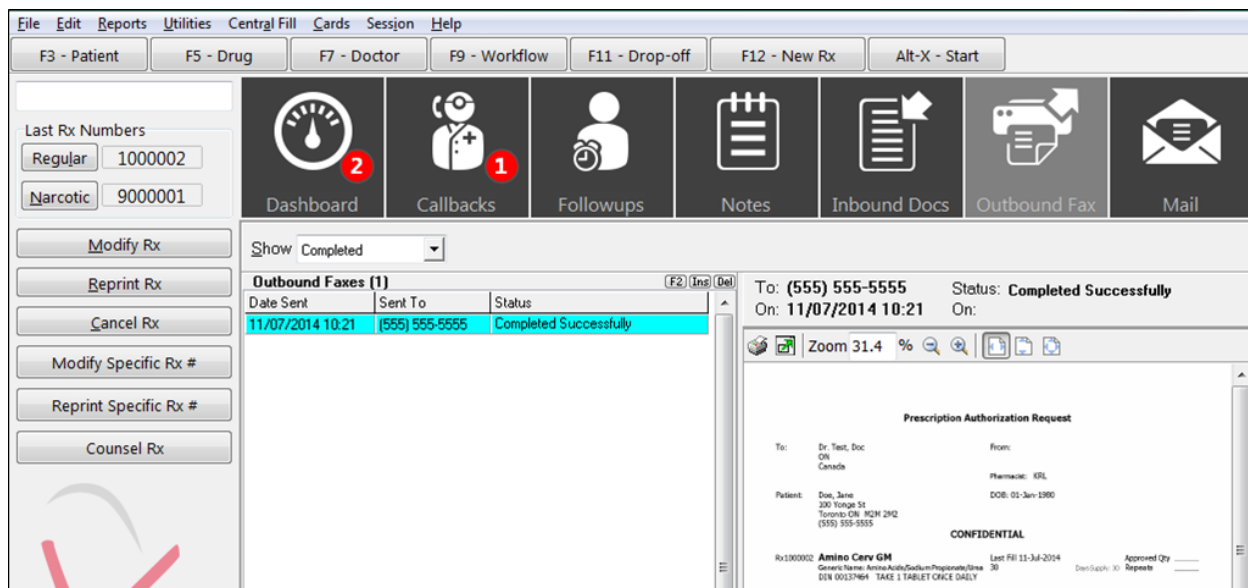
Fax Doctor (Prescription Authorization Request)

1. Call up a patient record and select **All Rxs** from the right navigation pane.
2. Right-click the Rx you want to generate a Doctor Authorization Report for and select **Fax Doctor(s)**.
3. The **Doctor Authorization Report** form will appear. Select the **Fax** radio button and complete the form.
 - **Comments tab:** Enter any comments you want to include in the report
 - **Customized Text tab:** Enter any body text you want to include in the report
 - **Options tab:** Select the components you want to include in the report

- **Cover Page Comments tab:** Enter any comments you want to appear on the cover page for the report



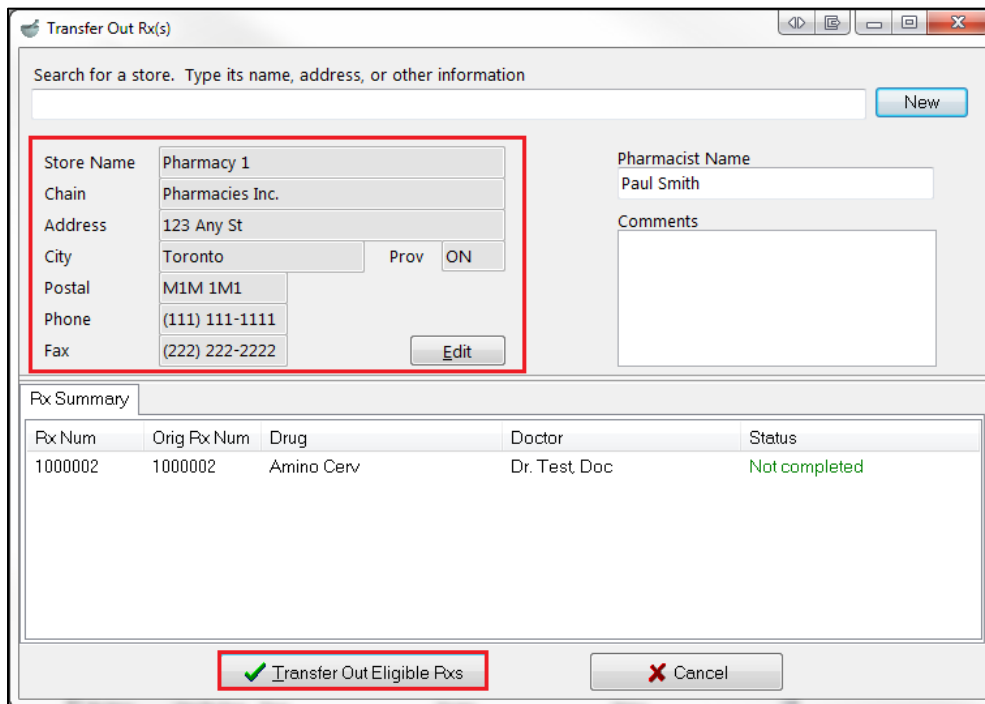
4. Click **Fax**. The Prescription Authorization Request will be sent to the fax number listed on the corresponding doctor profile and will appear in the **Outbound Fax** queue:



Rx Transfer Report

1. Call up a patient record and select **All Rxs** from the right navigation pane.
2. Right-click the Rx you want to transfer out and select **Transfer Rx to Another Store**.

3. Search for the store you want to transfer the Rx to and click **Transfer Out Eligible Rxs**.



Transfer Out Rx(s)

Search for a store. Type its name, address, or other information

New

Store Name: Pharmacy 1

Chain: Pharmacies Inc.

Address: 123 Any St

City: Toronto Prov: ON

Postal: M1M 1M1

Phone: (111) 111-1111

Fax: (222) 222-2222 Edit

Pharmacist Name: Paul Smith

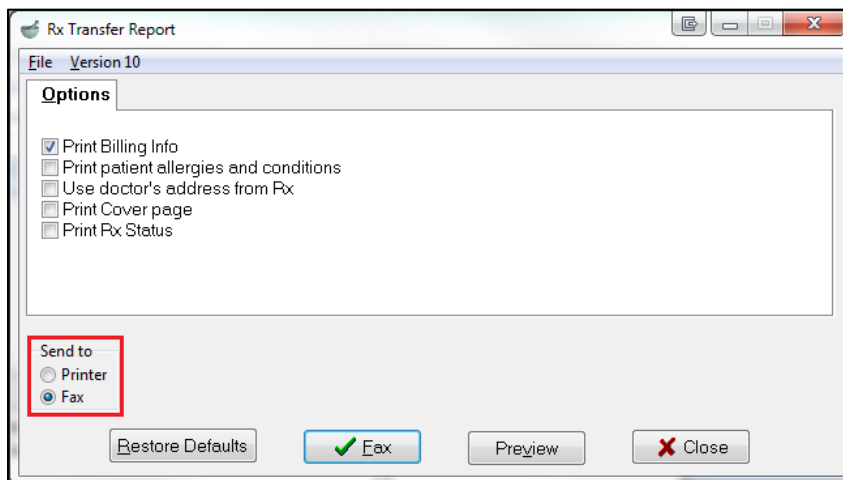
Comments:

Rx Summary

Rx Num	Orig Rx Num	Drug	Doctor	Status
1000002	1000002	Amino Cerv	Dr. Test Doc	Not completed

Transfer Out Eligible Rxs Cancel

4. Answer **Yes** when asked 'Do you want to print the Transfer Report?'.
5. Click the **Fax** radio button and select **Fax**.



Rx Transfer Report

File Version 10

Options

☒ Print Billing Info

☐ Print patient allergies and conditions

☐ Use doctor's address from Rx

☐ Print Cover page

☐ Print Rx Status

Send to

☐ Printer

☒ Fax

Restore Defaults Fax Preview Close

The Rx Transfer Report will be sent to the fax number on the store record that you selected and will appear in the **Outbound Fax** queue:

File Edit Reports Utilities Central Fill Cards Session Help

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

Last Rx Numbers
Regular 1000003
Narcotic 9000002

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

Dashboard Callbacks Followups Notes Inbound Docs Outbound Fax Mail

Show Pending

Outbound Faxes (2)

Date Sent	Sent To	Status
11/07/2014 10:37	(222) 222-2222	Completed Successfully
11/07/2014 10:21	(555) 555-5555	Completed Successfully

To: (222) 222-2222 Status: Completed Successfully
On: 11/07/2014 10:37

Rx Transfer Report

To: Pharmacy 1
123 Any St
Toronto, ON M5H 1A1
Phone: (111) 111-1111
Fax: (222) 222-2222

From: Pharmacist: Kroll

Patient: Doe, Jane
DOB: 05-Jan-1980
Plan: Ontario Drug Benefits
Billing Info: 1111 Rel: 0

Rx Transfer Report
Printed on: 11/07/2014 10:37:29

Rx	Drug ID#	First Fill Date	Written/Oral Last Fill Date	Doctor Address City/Prov	Doctor # Phone Written Date
1000003	Condon 20mg TAB 0263254	11-Jul-2014	11-Jul-2014	Dr. Test, Doc	123 11-04-2014

Inbound Documents

Incoming faxes are located in the **Inbound Docs** screen, which is accessed from the default **Alt-X Start** screen. Select **Inbound Fax** from the highlighted dropdown menu to view inbound faxes.

File Edit Reports Utilities Central Fill Cards Session Help

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

Last Rx Numbers
Regular 1000003
Narcotic 9000002

Modify Rx
Reprint Rx
Cancel Rx
Modify Specific Rx #

Dashboard Callbacks Followups Notes Inbound Docs Outbound Fax Mail

Show Pending Inbound Fax

Inbound Documents (1)

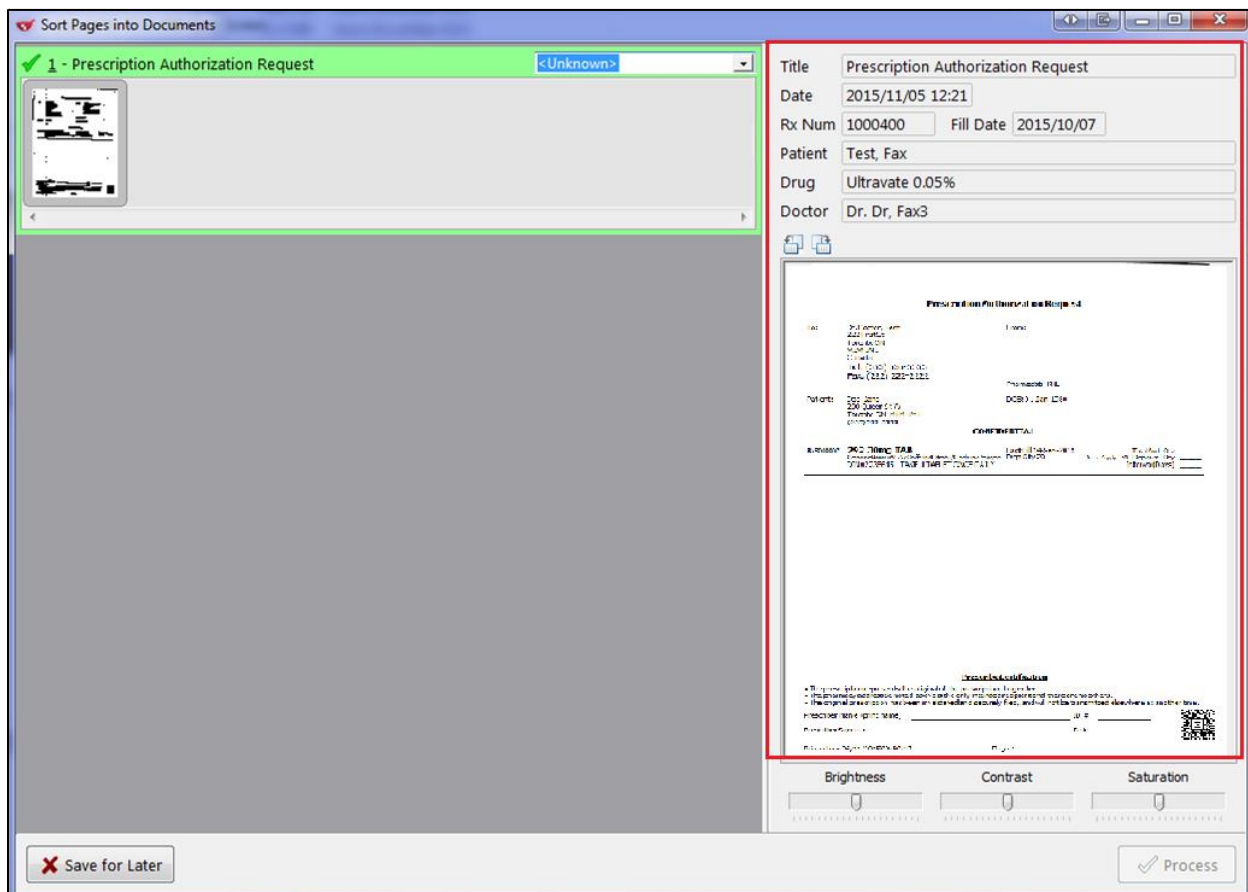
Date	Description
14/07/2014 10:35	Inbound Fax: 4163830001

Fax From: Inbound Fax: 4163830001
Received on: 14/07/2014 10:35

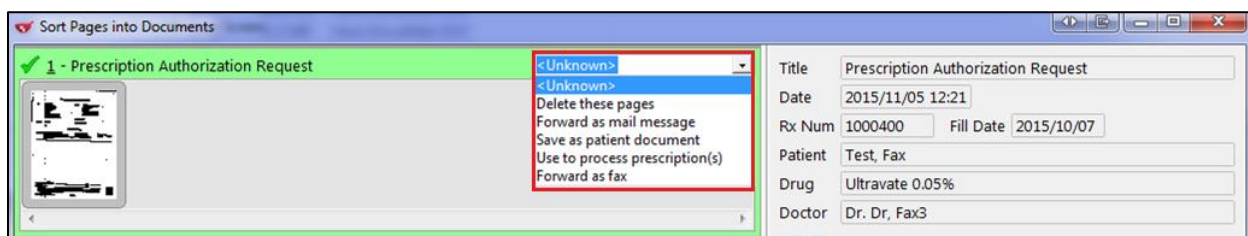
Fax Doctor (Prescription Authorization Request)

Inbound Prescription Authorization Requests contain 2D barcodes that get decoded by the Kroll Background Service. Once a 2D barcode has been decoded

1. Double-click the inbound fax from the **Inbound Documents** frame.
2. The **Sort Pages into Documents** screen will appear. If the 2D barcode has been successfully decoded, Rx information will populate on the right side of the screen.



3. Select an option from the dropdown list at the top of the screen. This determines how the inbound fax will be used.

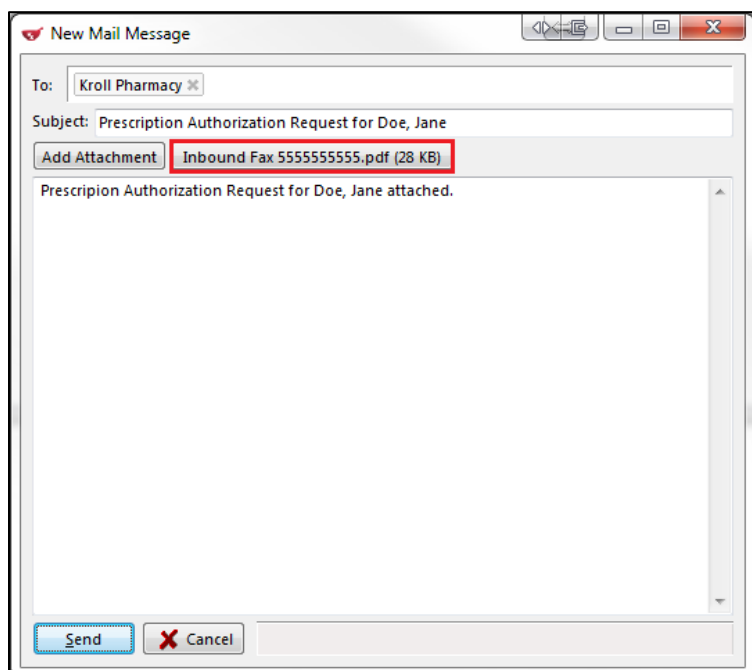


Delete these pages

The inbound fax image will be deleted.

Forward as mail message

The **New Mail Message** screen will appear with the fax image attached. Select a recipient, enter a subject line, and enter any comments in the space provided (optional). Click **Send**.



The screenshot shows a 'New Mail Message' window. The 'To:' field is set to 'Kroll Pharmacy'. The 'Subject:' field contains 'Prescription Authorization Request for Doe, Jane'. Below the subject field, there is an 'Add Attachment' button and a list of attachments. One attachment is listed: 'Inbound Fax 5555555555.pdf (28 KB)'. Below the attachment list, the text 'Prescription Authorization Request for Doe, Jane attached.' is visible. At the bottom of the window, there are 'Send' and 'Cancel' buttons.

Save as patient document

The **New Patient Document** screen will appear with the fax image attached. Enter a description. Click **Ins** to add a comment to the file (optional). Click **Save**.

New Patient Document

Title: **Inbound Fax 5555555555.pdf**

Description: Prescription Authorization Request

Comments (1)

Topic	Comment
General	Test comment

Save Cancel

The fax image will appear in the patient's document library. This screen can be accessed by selecting **Documents** from the right navigation pane in the patient card.

File Edit Patient Profile Reports Utilities NH Central Fill Cards Session Help

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

Last Name: Doe First Name: Jane Salutation: Ms. OK Save Cancel

Address 1: 200 Queen St W Address 2: Phone Numbers (1) Birthdate: 01/01/1980

City: Toronto Prov: ON Age: 35 years Gender: Female

Postal: M1M 1M1 Country: Canada Language: English

Email: Send Family Doctor Height: 5'6" Weight: 120lbs

Quick Code: F2 Clear Load Delete

Documents

Filter documents here Filter

Items (1)	Title	By	Document Type	Created	Retain Until
Inbound Fax 5555555555.pdf		KRL	Manual Import	06/11/2015	

Profile

- All Rx's
- Active Rx's
- Active Rx's w/Pas-times
- Refillable Rx's
- Pricing Profile
- Not Disp./OTC Rx's
- Rx's Filled in Error
- Suspended Rx's
- Perform FDB Analysis

View

- Alternate Addresses
- AR Profile
- Batches
- Charting
- Consents
- Credit Cards
- Documents**
- History
- Medication Review/Dialogs (8)
- Rx Counseling History
- To Do Items
- Work Orders

Use to process prescriptions

The **F11 - Drop-off** form will appear with the original fill parameters of the faxed Rx. Make any necessary changes to the Rx. Click **Okayed**.

The screenshot shows the TELUS Health software interface. At the top, there are menu tabs: File, Edit, Drop-off, Profile, Utilities, NH, Central Fill, Cards, Session, and Help. Below these are function buttons: F3 - Patient, F5 - Drug, F7 - Doctor, F9 - Workflow, F11 - Drop-off, F12 - Fill Now, and Alt-X - Start. The main form area is divided into several sections. On the left, there's a 'Patient Search' section with fields for Name (Doe, Jane), Age (35 years), Phone (Home, (555) 555-5555), Address (200 Queen St W), and Gender (Female). Below this is a 'Priority' section with a dropdown for 'F2' and a 'Due' date of 'in 19 mins'. The central part of the form is titled 'Copy Rx - 1 of 1' and contains fields for Doctor (Dr. Doctor, Test), Address (222 First St), and License (123123123). Below these are fields for Drug/Mix (Apo-Ciproflox/Ciprofloxacin Hydrochloride), Strength (500mg), Form (TAB), and Manufacturer (APX (Apot)). There's also a 'Sig' field with '1' and 'Init KRL'. The 'Disp Qty' is 30, and 'Days Supply' is 30. The 'Rx Status' is 'Fill'. At the bottom of this section are 'Okayed' and 'Refused' buttons, with 'Okayed' highlighted in red. On the right side of the form, there's a 'Drop-off' section with options like 'Import Script Image File' and 'Select Script Image'. Below that is a 'Patient' section with 'Documents' and 'View Drop-off Work Orders'. At the bottom of the form is a 'Workorder items' table with columns for #, Action, Patient, Drug, and Doctor. The table is currently empty. At the bottom left is a 'Clear All' button, and at the bottom right is a 'Finalize Work Order' button.

The Rx will be added to the **Workorder items** frame.

The screenshot shows the 'Workorder items' table in the TELUS Health software. The table has columns for #, Action, Patient, Drug, and Doctor. There is one row of data: # 1, Action New Rx, Patient Doe, Jane, Drug Apo-Ciproflox/Ciprofloxacin Hydroc..., Doctor Doctor, Test. The row is highlighted with a red border. At the bottom left is a 'Clear All' button, and at the bottom right is a 'Finalize Work Order' button.

If the Prescription Authorization Request contains additional Rx's, the original fill parameters of the next faxed Rx will populate. Make any necessary changes and click **Okayed** for each Rx included in the fax.

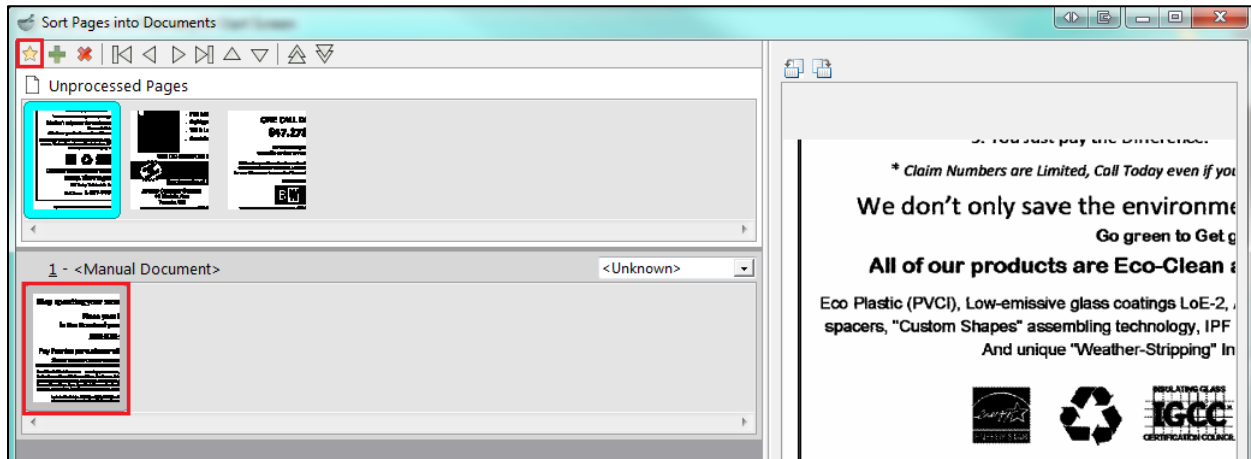
When each Rx has been added to the **Workorder items** pane, click **Finalize Work Order**. A To Do record will be created for each Rx.

NOTE: If you click **Refused** instead of **Okayed**, no To Do record will be created for the Rx.

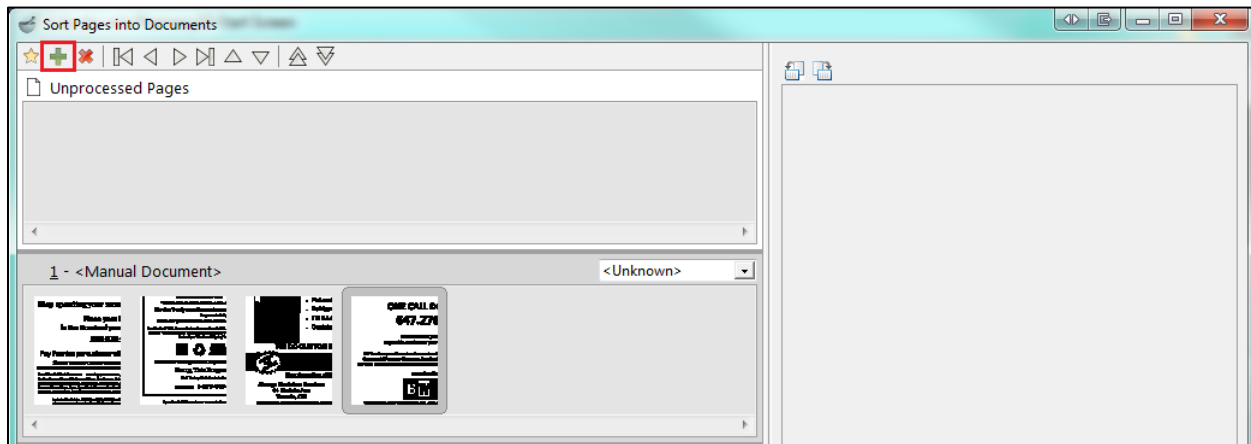
The **New Fax Message** screen will appear with the fax image attached. Select a recipient and click **Send**.

Modifying an Inbound Document

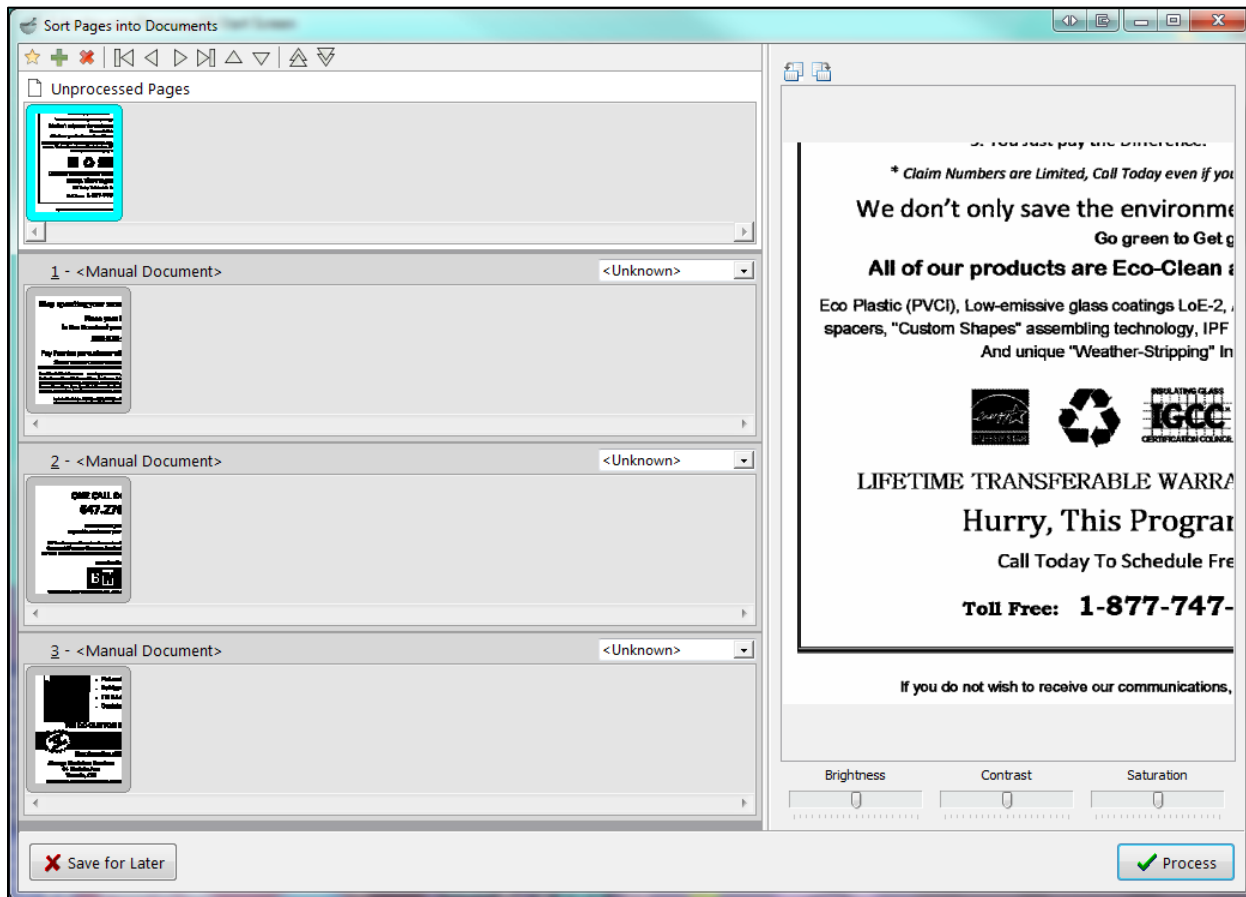
1. Double-click the fax you want to modify.
2. The **Sort Pages into Documents** screen will appear. The pages must be added to a manual document before they can be modified. To do so, select the first page and click the star icon. The page will appear in the **<Manual Document>** pane.



3. Select each additional page you want included in the document and click the plus sign icon. The additional pages will appear in the **<Manual Document>** pane.



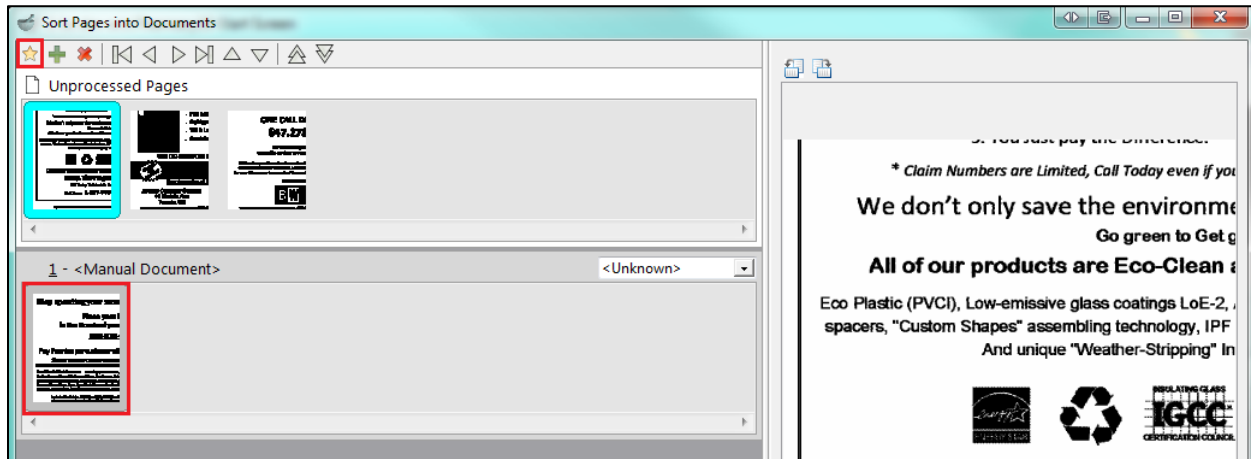
If you want to modify each page separately, click the star icon instead of the plus sign icon for the subsequent pages. Each page will appear in a separate **<Manual Document>** pane and can be modified independently.



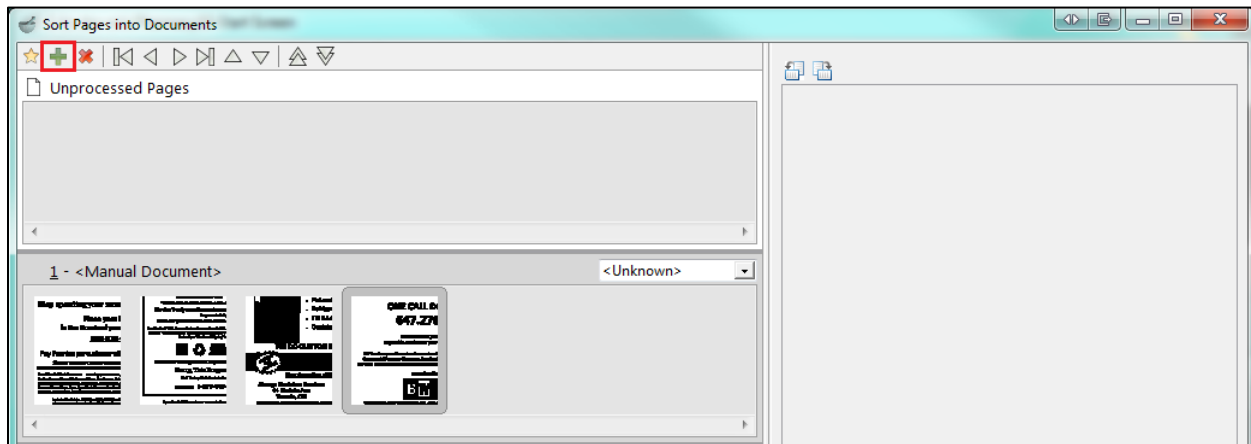
4. Use the **Brightness**, **Contrast**, and **Saturation** controls to adjust the colour display.
5. Click **Process** to save the changes you made to the document.

Using an Inbound Document to Process a Prescription

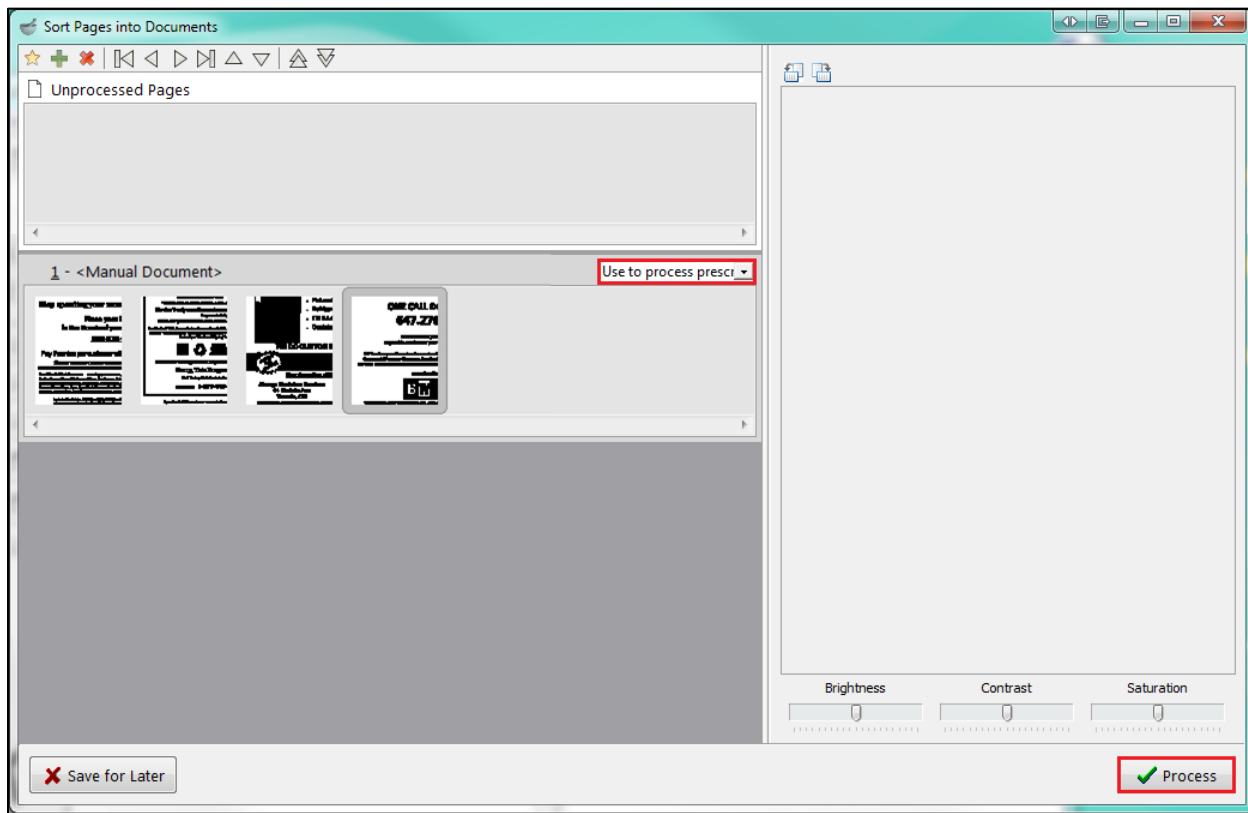
1. Double-click the fax you want to use for a prescription.
2. The **Sort Pages into Documents** screen will appear. The pages must be added to a manual document before they can be used. To do so, select the first page and click the star icon. The page will appear in the **<Manual Document>** pane.



3. Select each additional page you want included in the document and click the plus sign icon. The additional pages will appear in the **<Manual Document>** pane.



4. Select **Use to process prescription** from the dropdown menu and click **Process**.



- The **Drop-off** screen will appear. Enter the required patient, doctor, and drug information and click **Add**.

File Edit Drop-off Profile Utilities Central Fill Cards Session Help

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

Patient Search Doe, Jane Age: 34 years Phone Cell (555) 555-5555

Address 100 Yonge St Female Plan ODB Client ID 1111

Priority Default Wait Time F2 Due in 19 mins Delivery Pickup Work Order 5

Ref: # Rx's on page

New Rx Rx is # on page

Doctor Name Dr. Test, Doc Clear

Address Lic# 123

Drug/Mix Name A.C. & C/Asa/Codeine Phosphate/Caffeine Clear

Strength 375/8/15mg Form TAB Manuf VIT (Vita H)

Sig *1 Init KRL

TAKE 1 TABLET ONCE DAILY

Disp Qty 30 + Refills 6 = Auth Qty 210

Days Supply 30 Unlimited Refills Until

Rx Status Fill Written Date

Rx Comment

Import New Image Select a Different Image Don't Use This Image Add Cancel

Workorder Items F2 Del

#	Action	Patient	Drug	Doctor
1	New Rx	Doe, Jane	A.C. & C/Asa/Codeine Phosphate/Ca...	Dr. Test, Doc
2	New Rx	Doe, Jane	Amatine/Midodrine Hydrochloride 2...	Dr. Test, Doc

Clear All Finalize Work Order

- The Rx will appear in the **Workorder Items** pane. Repeat step 5 for each Rx you want included in the work order. When you are finished, click **Finalize Work Order**.

Import New Image Select a Different Image Don't Use This Image Add Cancel

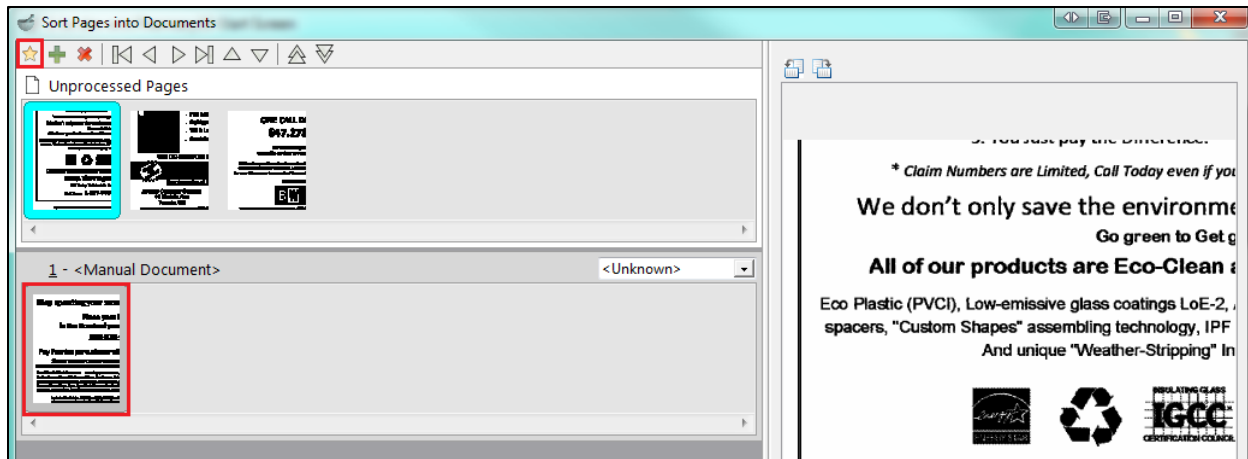
Workorder items (2) F2 Del

#	Action	Patient	Drug	Doctor
1	New Rx	Doe, Jane	A.C. & C/Asa/Codeine Phosphate/Ca...	Dr. Test, Doc
2	New Rx	Doe, Jane	Amatine/Midodrine Hydrochloride 2...	Dr. Test, Doc

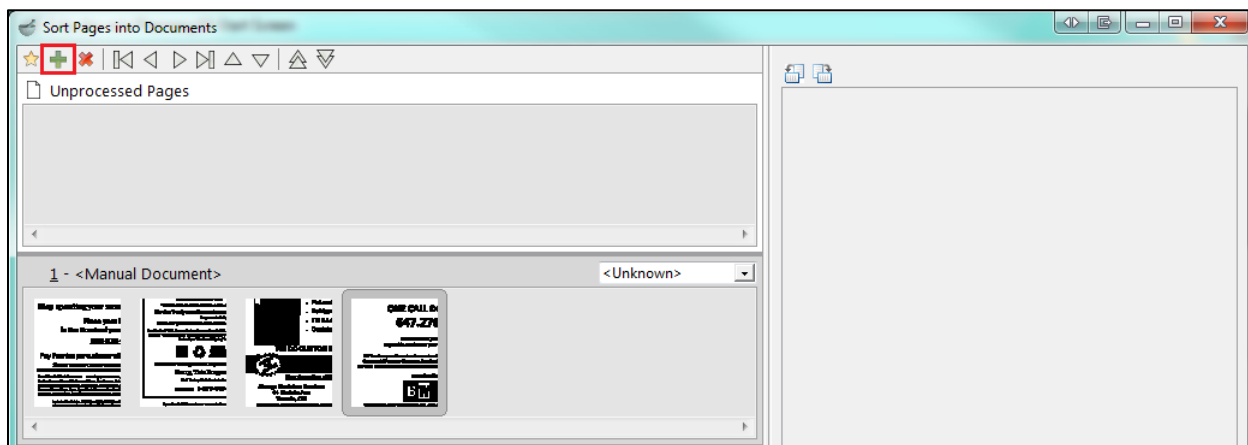
Clear All Finalize Work Order

Saving as a Patient Document

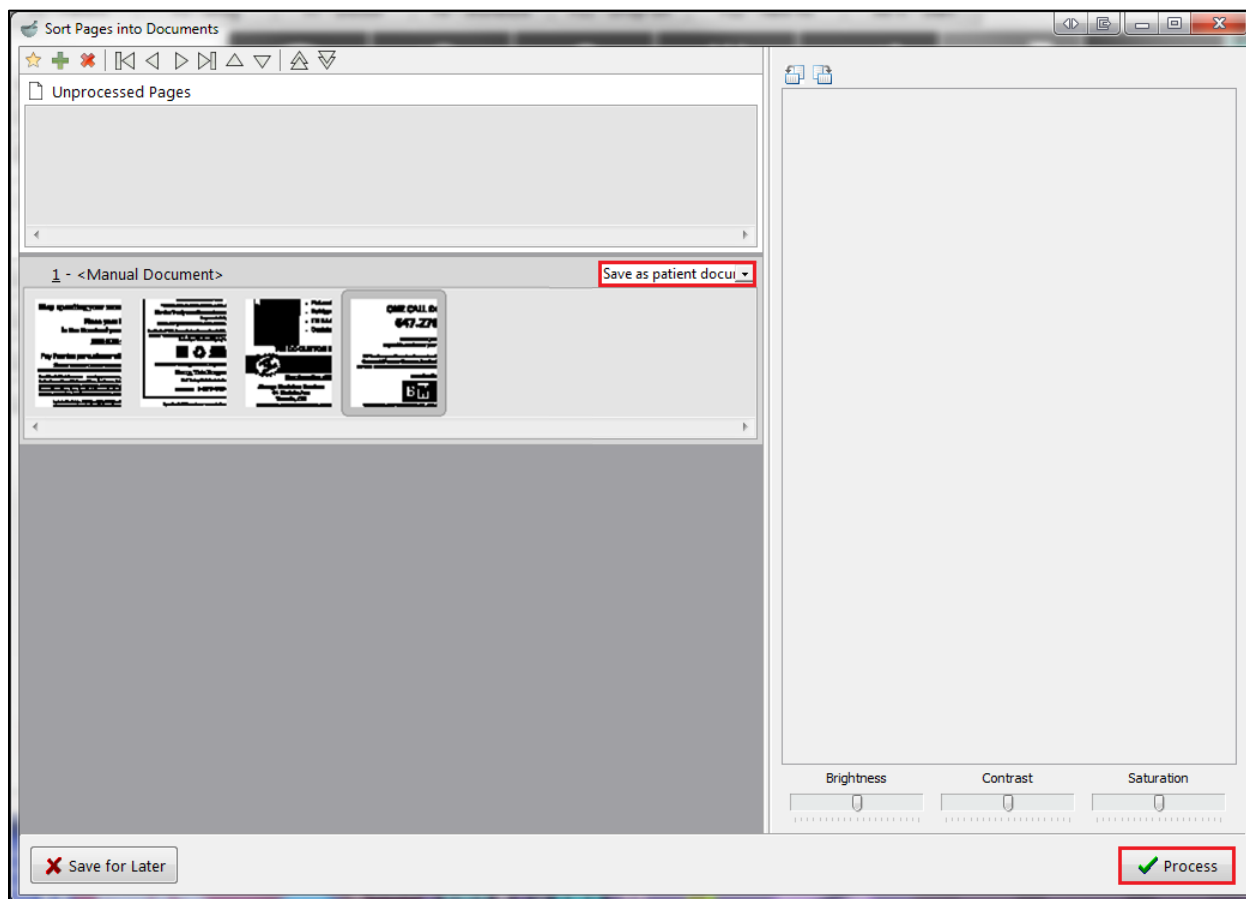
1. Double-click the fax you want to save as a patient document.
2. The **Sort Pages into Documents** screen will appear. The pages must be added to a manual document before they can be used. To do so, select the first page and click the star icon. The page will appear in the **<Manual Document>** pane.



3. Select each additional page you want included in the document and click the plus sign icon. The additional pages will appear in the **<Manual Document>** pane.



4. Select **Save as patient document** from the dropdown menu and click **Process**.



- The **New Patient Document** screen will appear. Click **F2** to perform a patient search. Enter a title and description and any applicable comments. When you are finished, click **Save**.

New Patient Document

Patient: Doe, Jane F2 Age: 34 years Phone: Cell (555) 555-5555
 Address: 100 Yonge St Female Plan: ODB Client ID: 1111

Title: Rx image
 Description: Rx image from 14/07/2014

☐ Retain this document until 120 months after Last Date of Service

Comments (1) (F2) (Ins) (Del)

Topic	Comment
General	Test

Prescription Authorization Request

To: Dr. Test, Doc
 From: Pharmacist: KRL
 Patient: Doe, Jane
 DOB: 01-Jan-1980
 Rx1000002 Amino Cerv GM Last Fill 11-Jul-2014
 Generic Name: Amino Acids/Sodium Propionate/Lime 30
 C09N 05127M04 TAKE 2 TABLET ONCE DAILY

CONFIDENTIAL

Save Cancel

The document will be added to the patient's documents. To view the document, call up the Patient Profile and select **Documents** from the right navigation pane.

Patient Profile

Last Name: Doe First Name: Jane Salutation: Ms. OK Save Scan

Address 1: 100 Yonge St Address 2: Phone Numbers (1) (F2) (Ins) (Del)
 City: Toronto Prov: ON Description: Phone: (555) 555-5555
 Postal: M2M 2M1 Country: Canada
 Email: janedoe@email.com Send Family Doctor: Birthdate: 01/01/1980
 Quick Code: Height: Weight: Gender: Female Language: English
 Comments (0) (F2) (Ins) (Del) ODB: ODB Client ID: 1111
 Plans (1) (F2) (Ins) (Del)
 SubPlan Code: Group ID: Client ID: Expiry:
 1 ODB 1111

Allergies (0) (Add Drug) (F2) (Ins) (Del)

Medical Conditions (0) (F2) (Ins) (Del)

Patient
 Profile
 All Rxs
 Active Rxs
 Active Rxs w/Passtimes
 Refillable Rxs
 Pricing Profile
 Not Disp./OTC Rxs
 Rxs Filled in Error
 Suspended Rxs
 Perform FDB Analysis
 View
 Alternate Addresses
 Batches
 Charting
 Consent
 Credit Cards
 Documents
 Medication Review/Dialogs (1)

General Family Copays Communications Other

Patient: Active ☒ Animal ☐ Deceased On: Consent: Consent: Unknown
 Unit Dose: Type: <None> Cycle: <None>

The **Patient Document List** screen will appear. Double-click a document view its contents.

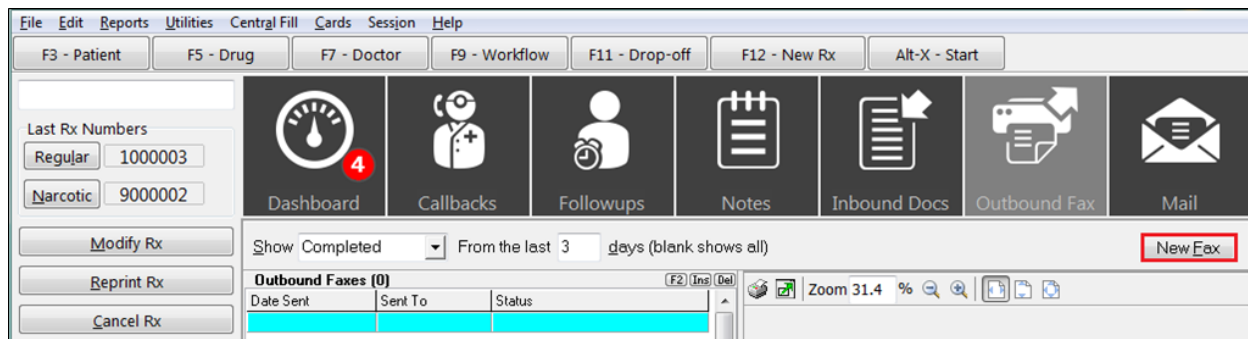
Outgoing Faxes

Outgoing faxes are located at the top of the default view on the **Alt-X Start** screen. When sending a fax or mail message, you have the option to include an existing script image from your computer or scan a new image.

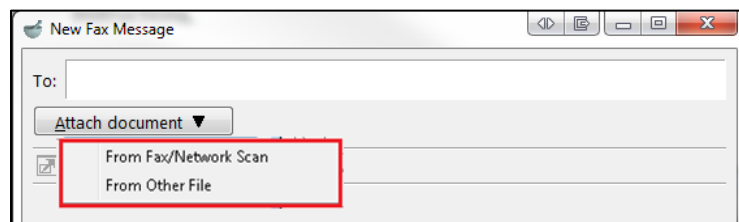
Please refer to your scanner's user manual for operation instructions.

Sending a Fax

1. Select the **Outbound Fax** tab and click **New Fax**.



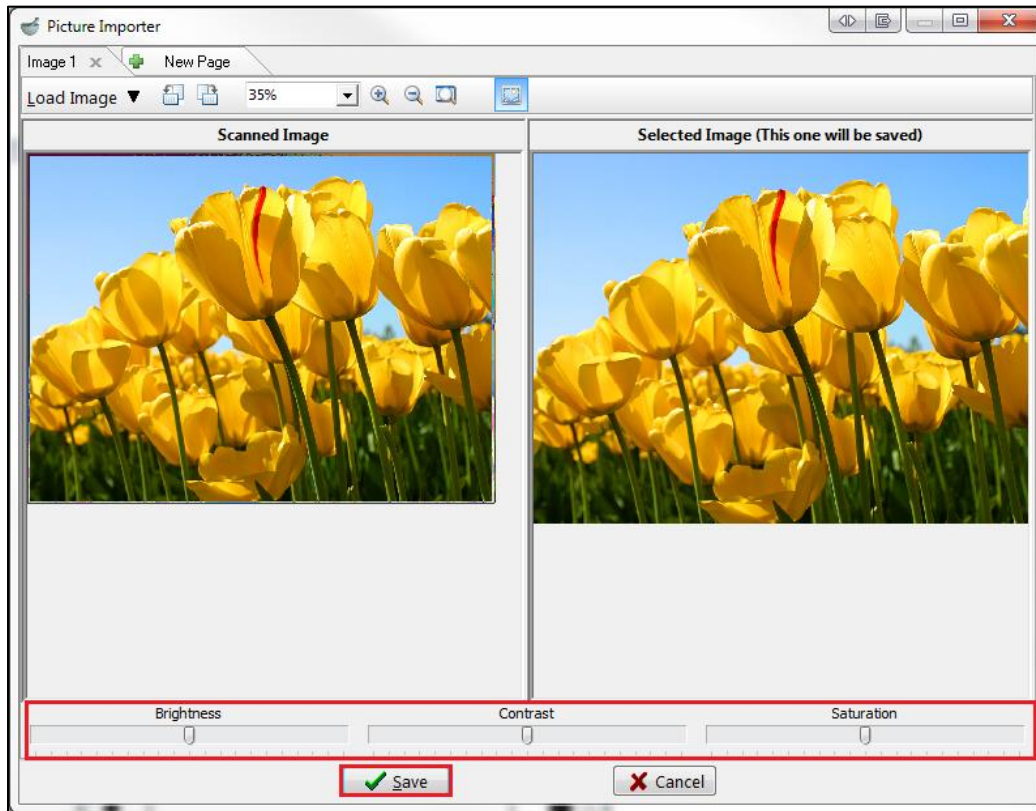
2. Click **Attach Document**. Select **From Fax/Network Scan** to scan a new image, or select **From Other File** to upload an image from your computer.



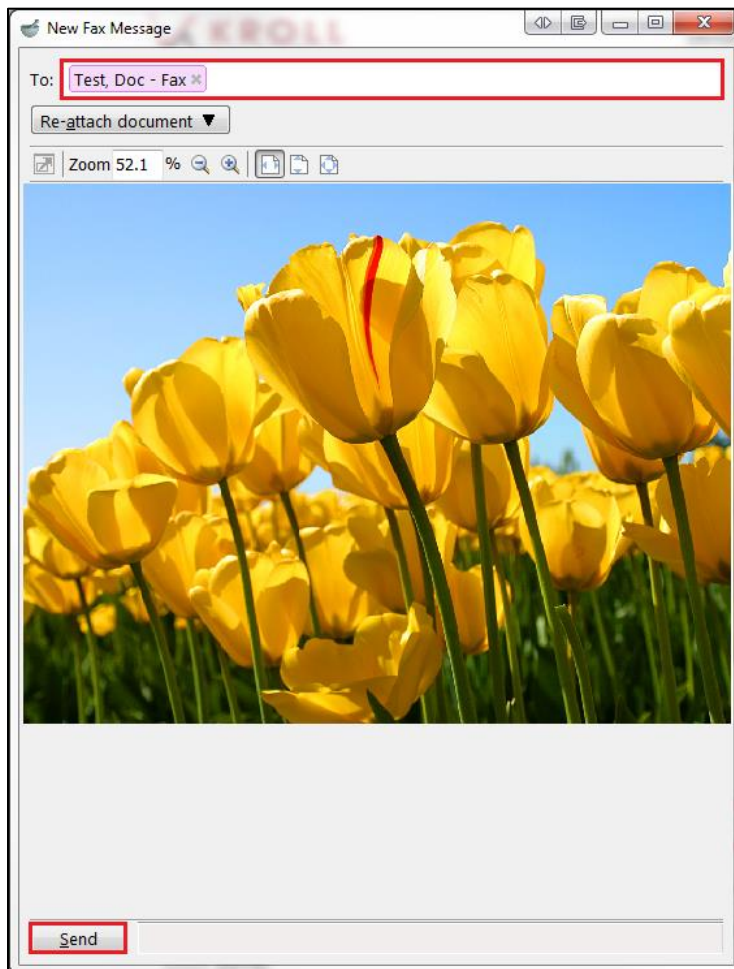
- If you selected **From Fax/Network Scan**, feed the script through your scanner, as shown:



- If you selected **From Other File**, locate the document you want to attach and click **Open**. The image will display in the **Picture Importer** window. Use the **Brightness**, **Contrast**, and **Saturation** controls to adjust the colour display. When you are finished, click **Save**.



3. Enter the recipient's fax number in the **To** field and press the **Enter** key on your keyboard. Click **Send**.



- When the fax has been transmitted, it will show a status of **Completed Successfully**.

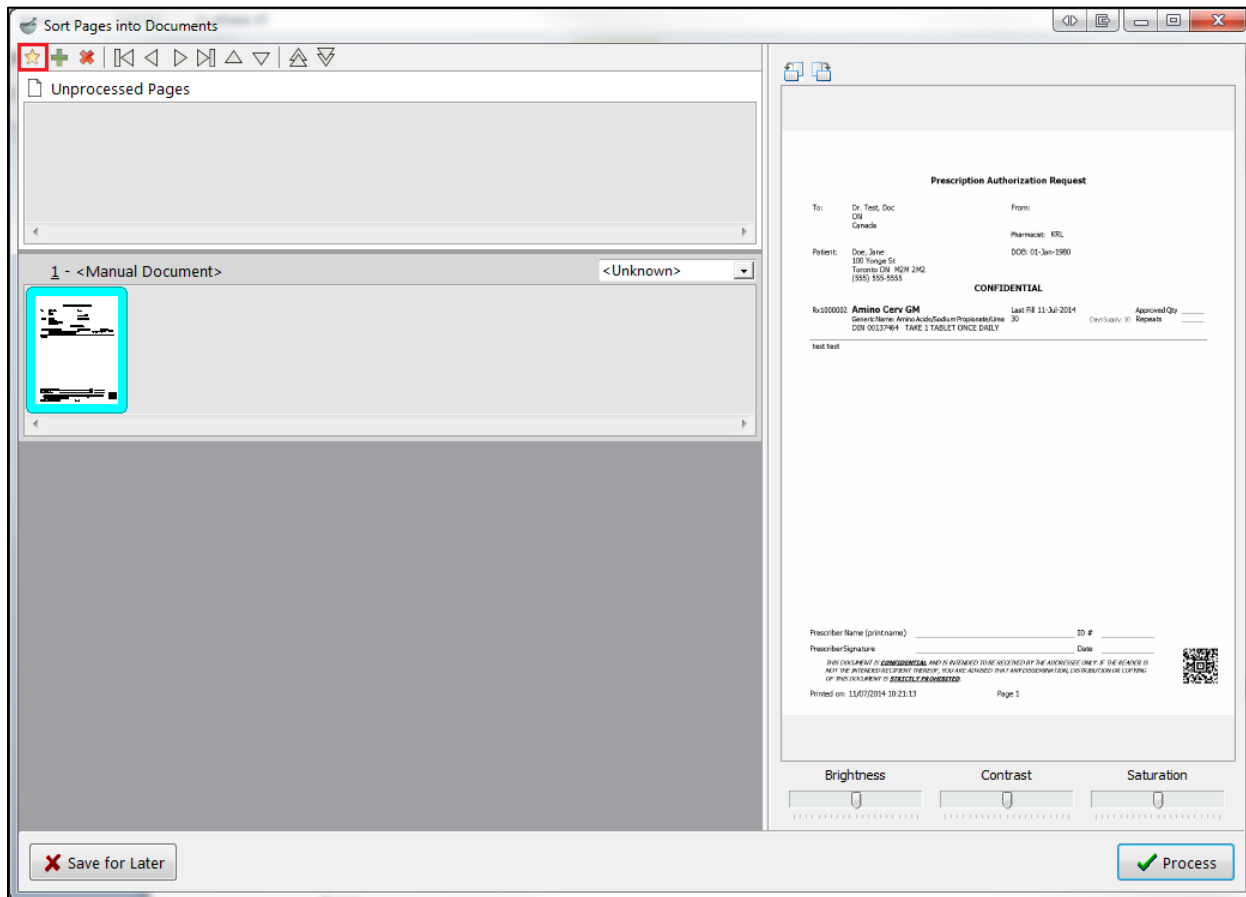
The screenshot shows the TELUS Health software interface. At the top, there are menu tabs: File, Edit, Reports, Utilities, Central Fill, Cards, Session, and Help. Below these are function buttons: F3 - Patient, F5 - Drug, F7 - Doctor, F9 - Workflow, F11 - Drop-off, F12 - New Rx, and Alt-X - Start. On the left, there's a section for 'Last Rx Numbers' with input fields for Regular (1000003) and Narcotic (9000002), and buttons for Modify Rx, Reprint Rx, Cancel Rx, Modify Specific Rx #, Reprint Specific Rx #, and Counsel Rx. The main area shows a 'Show Completed' filter and a table of 'Outbound Faxes [3]'. The table has columns for Date Sent, Sent To, and Status. One entry is visible: 11/07/2014 11:47, (555) 555-5555, Completed Successfully. To the right, there's a 'New Fax' button and a preview of a document titled 'Prescription Authorization Request' with patient information and a QR code.

Sending as Mail

- Double-click the document you want to send as a mail message. The document will appear in the **Unprocessed Pages** section of the **Sort Pages into Documents** screen.

The screenshot shows the 'Sort Pages into Documents' window. On the left, there's a section for 'Unprocessed Pages' with a thumbnail of a document. The main area displays a 'Prescription Authorization Request' form. The form includes fields for To (Dr. Test, Doc, Canada), From (Pharmacist: KRL), Patient (Doe, Jane, 100 Yonge St, Toronto, ON M5N 2M2, (555) 555-5555), and DOB (01-Jan-1980). It also shows a 'CONFIDENTIAL' warning and a QR code. At the bottom, there are fields for Prescriber Name (printname), TO #, Prescriber Signature, and Date. A 'Save for Later' button is on the left, and a 'Process' button is on the right.

- The page(s) in the document must be added to a manual document before they can be used. To do so, select the first page and click the start icon. The page will appear in the **<Manual Document>** pane.



- Select each additional page you want included in the document and click the plus sign icon. The additional pages will appear in the **<Manual Document>** pane.

4. Select **Forward as mail message** from the dropdown menu in the **<Manual Document>** pane and click **Process**.

Sort Pages into Documents

Unprocessed Pages

1 - <Manual Document> Forward as mail mes: ▾

Prescription Authorization Request

To: Dr. Test, Doc
ON
Canada

From: Pharmacist: KSL

Patient: Doc: Jane
100 Yonge St
Toronto ON M5N 2M2
(416) 555-5555

DOB: 01-Jan-1980

CONFIDENTIAL

Ro:000002 **Amino Cerv GM** Last Fill 11-Jul-2014 Approved Qty _____
Generic Name: Amino Acids/Sodium Propionate/Urea 30 Days Supply 30 Repeats _____
CIN 00127464 TAKE 1 TABLET ONCE DAILY

best test

Prescriber Name (print name) _____ ID # _____
Prescriber Signature _____ Date _____

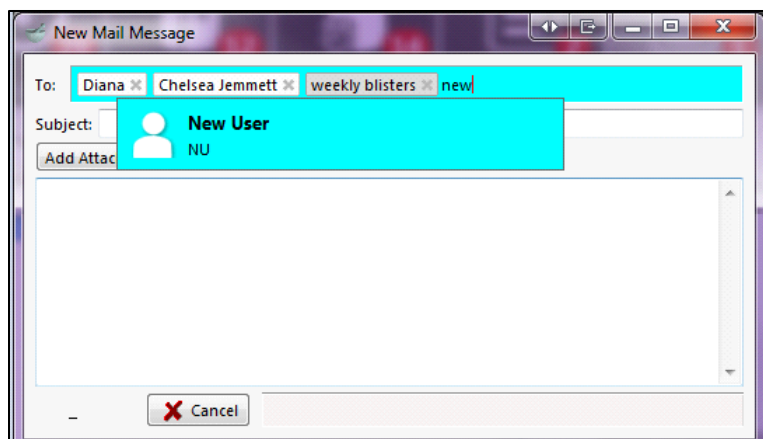
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Printed on: 11/07/2014 10:21:13 Page 1

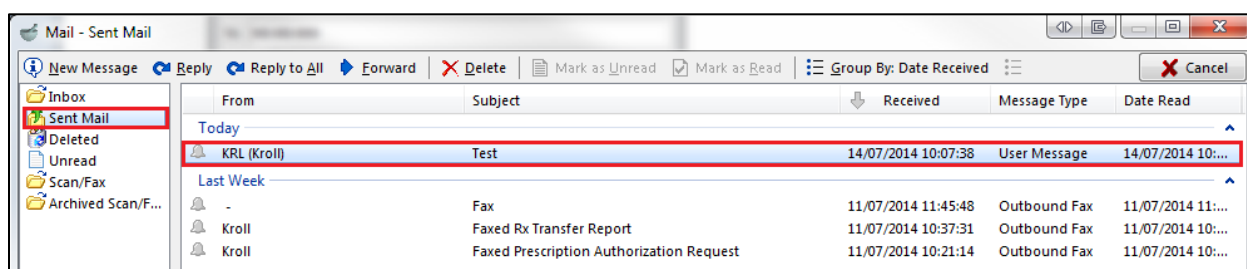
Brightness Contrast Saturation

Save for Later Process

5. The **New Mail Message** window will appear. Enter the recipient's user initials and any body text you want included with the mail message. You can send this message to additional recipients by entering more user initials in the **To:** field. When you are finished, click **Send**.



The mail message will appear in the **Sent Mail** folder (accessed via the **Mail** dashboard icon).



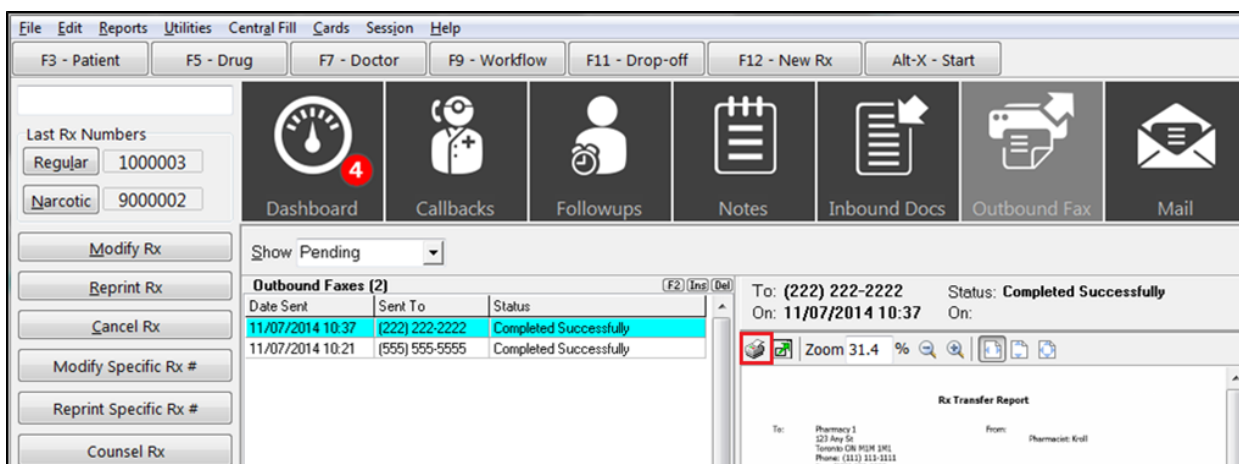
NOTE: Mail messages can be sent to Kroll users only.

Printing and Deleting

This section explains how to print and delete faxes.

To print a fax:

Select the fax you want to print and click the **Print** icon.



To delete a fax:

Right-click the fax you want to delete and select **Delete**.

