



Appointment Calendars

January 2020

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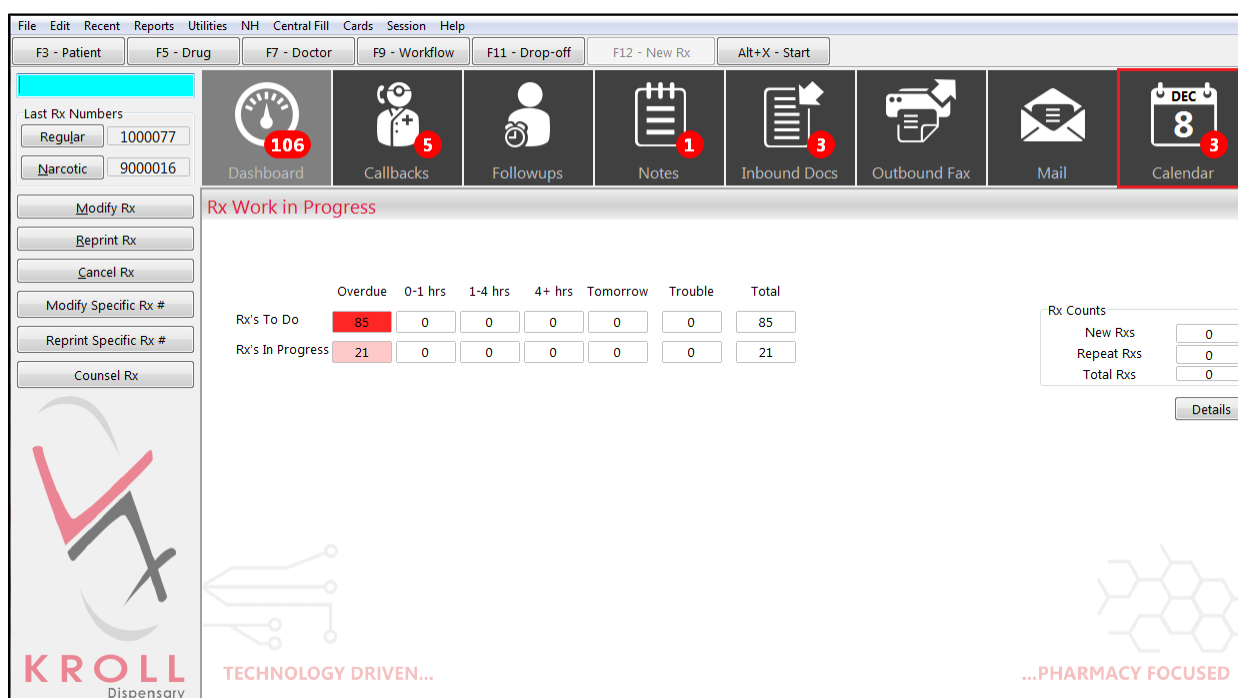
Appointment Calendar

The Appointment Calendar is a tool that helps pharmacies manage and organize patient appointments within the Kroll application. Appointments can be made for a wide variety of service such as Flu Shots, Immunizations, and Medication Reviews, and can also be used to coordinate staff activities such as shifts, break times, and vacation.

You must have Kroll V10 SP9 or higher to use this functionality.

Calendar Screen Explained

The Appointment Calendar is accessed by selecting the **Calendar** tile from the **Alt+X - Start** screen. The tile count indicates the number of remaining appointments scheduled for today.



The screenshot shows the Kroll Dispensary software interface. The top menu bar includes File, Edit, Recent, Reports, Utilities, NH, Central Fill, Cards, Session, and Help. Below the menu bar 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 content area is divided into two sections. The top section contains a row of icons for Dashboard (106), Callbacks (5), Followups, Notes (1), Inbound Docs (3), Outbound Fax, Mail, and Calendar (3). The Calendar icon is highlighted with a red box. Below this row is a section titled "Rx Work in Progress" which contains a table with columns: Overdue, 0-1 hrs, 1-4 hrs, 4+ hrs, Tomorrow, Trouble, and Total. The table has two rows: "Rx's To Do" and "Rx's In Progress". The "Rx's To Do" row shows 85 Overdue, 0 in 0-1 hrs, 0 in 1-4 hrs, 0 in 4+ hrs, 0 Tomorrow, 0 Trouble, and a Total of 85. The "Rx's In Progress" row shows 21 Overdue, 0 in 0-1 hrs, 0 in 1-4 hrs, 0 in 4+ hrs, 0 Tomorrow, 0 Trouble, and a Total of 21. To the right of the table is a section titled "Rx Counts" with buttons for New Rx, Repeat Rx, and Total Rx, each with a count of 0. Below the table is a "Details" button. The bottom of the screen features the Kroll Dispensary logo and the text "TECHNOLOGY DRIVEN..." and "...PHARMACY FOCUSED".

	Overdue	0-1 hrs	1-4 hrs	4+ hrs	Tomorrow	Trouble	Total
Rx's To Do	85	0	0	0	0	0	85
Rx's In Progress	21	0	0	0	0	0	21

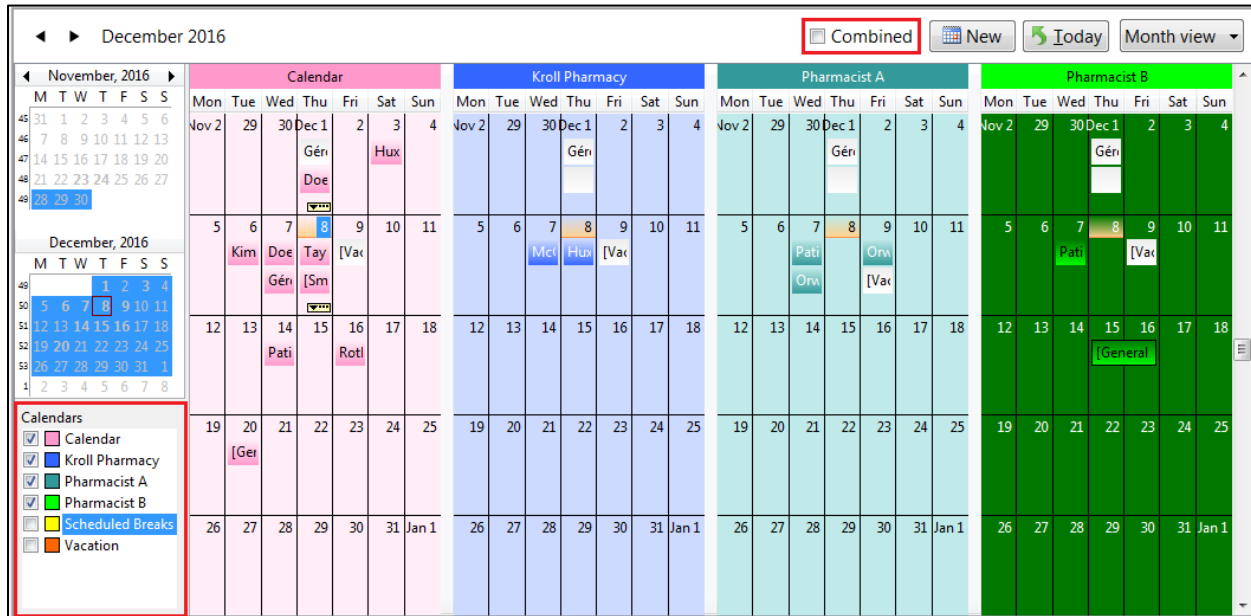
Rx Counts

New Rx	0
Repeat Rx	0
Total Rx	0

Details


Calendars


Each configured calendar will appear in the bottom left corner of the **Calendar** screen. Place a checkmark next to the calendars whose appointments you want to view. If **Combined** is not enabled, a column for each selected calendar will display.





The screenshot displays the Kroll Pharmacy Appointment Calendar for December 2016. The interface includes a sidebar on the left with a 'Calendars' section where four calendars are listed with checkboxes: 'Calendar' (checked), 'Kroll Pharmacy' (checked), 'Pharmacist A' (checked), and 'Pharmacist B' (checked). Below these are 'Scheduled Breaks' and 'Vacation' options. The main calendar area shows a combined view of these four calendars. The 'Calendar' column is pink, 'Kroll Pharmacy' is blue, 'Pharmacist A' is light blue, and 'Pharmacist B' is green. Appointments are represented by colored blocks with names or labels like 'Gén', 'Doe', 'Hux', 'Kim', 'Tay', 'Pati', 'Roti', and 'General'. Navigation buttons at the top right include 'Combined' (highlighted with a red box), 'New', 'Today', and 'Month view'.


If **Combined** is enabled, the **Calendar** screen will display all scheduled appointments associated with each selected calendar.



Dashboard **106**



Callbacks **5**



Followups


Notes **1**


Inbound Docs **3**


Outbound Fax


Mail


Calendar **3**

December 2016

☒ Combined

New

Today

Month view

November 2016	Monday Nov 28	Tuesday 29	Wednesday 30	Thursday Dec 1	Friday 2	Saturday 3	Sunday 4
31 1 2 3 4 5 6				Géroux, Amélie [In] Doe, Jane [General]		Huxley, Aldous [Gx]	
7 8 9 10 11 12 13							
14 15 16 17 18 19 20							
21 22 23 24 25 26 27							
28 29 30							
December 2016							
1 2 3 4 5 6 7 8							
9 10 11 12 13 14 15		Kim, Test [Immun]	Patient, Test [Trav] Doe, Jane [General]	Taylor, Barbara [In] [Smoking Cessatic]	Orwell, George [Sn] 8:00am [Vacation]		
16 17 18 19 20 21 22							
23 24 25 26 27 28 29			Patient, Test [Imm]	[General Consultation]			
30 31 1 2 3 4 5 6 7 8					Roth, Phillip [Minc]		
9 10 11 12 13 14 15							
16 17 18 19 20 21 22		[General Consultat]					
23 24 25 26 27 28 29							
30 31 1 2 3 4 5 6 7 8							January, 1

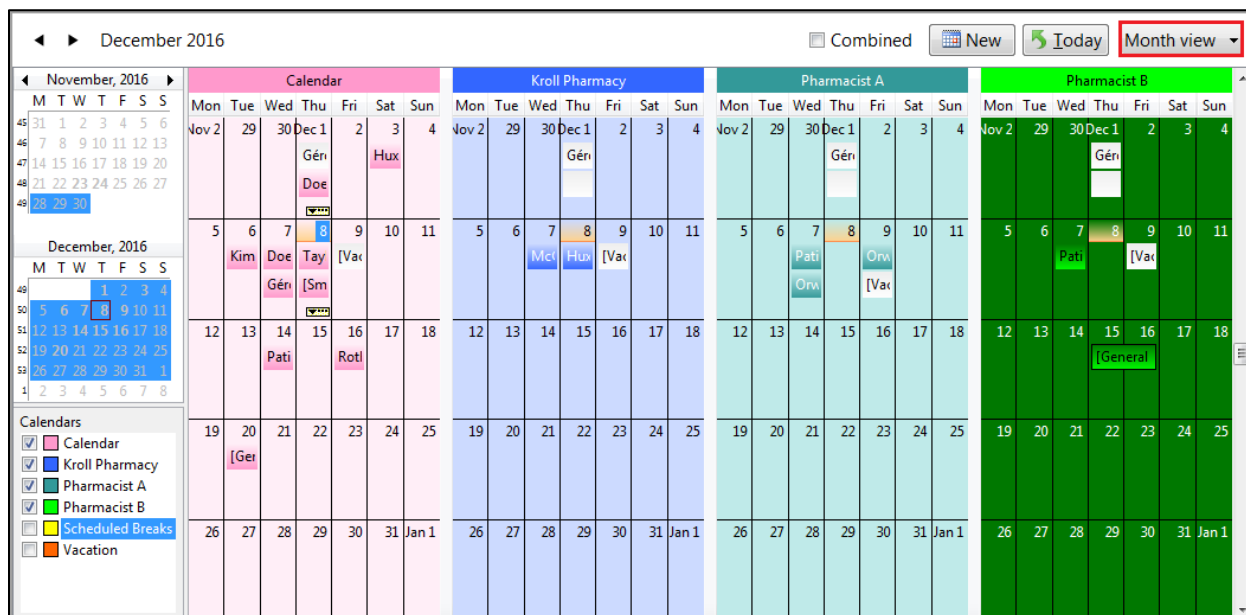
Calendars

☒ Calendar
 ☒ Kroll Pharmacy
 ☒ Pharmacist A
 ☒ Pharmacist B
 ☐ Scheduled Breaks
 ☐ Vacation

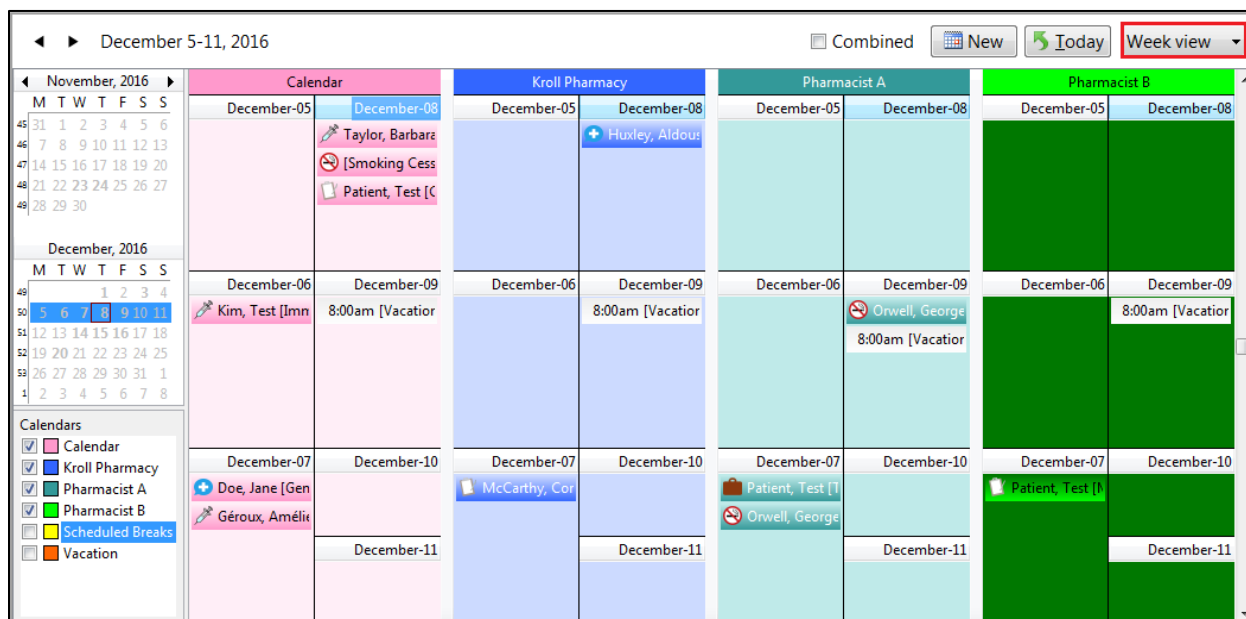
Date Views

The dropdown menu in the top right corner of the **Calendar** screen allows you to select a **Month view**, **Week view**, or **Day View**. In each view, you can use the arrow buttons in the top left corner of the screen to select a different month, week, or day.

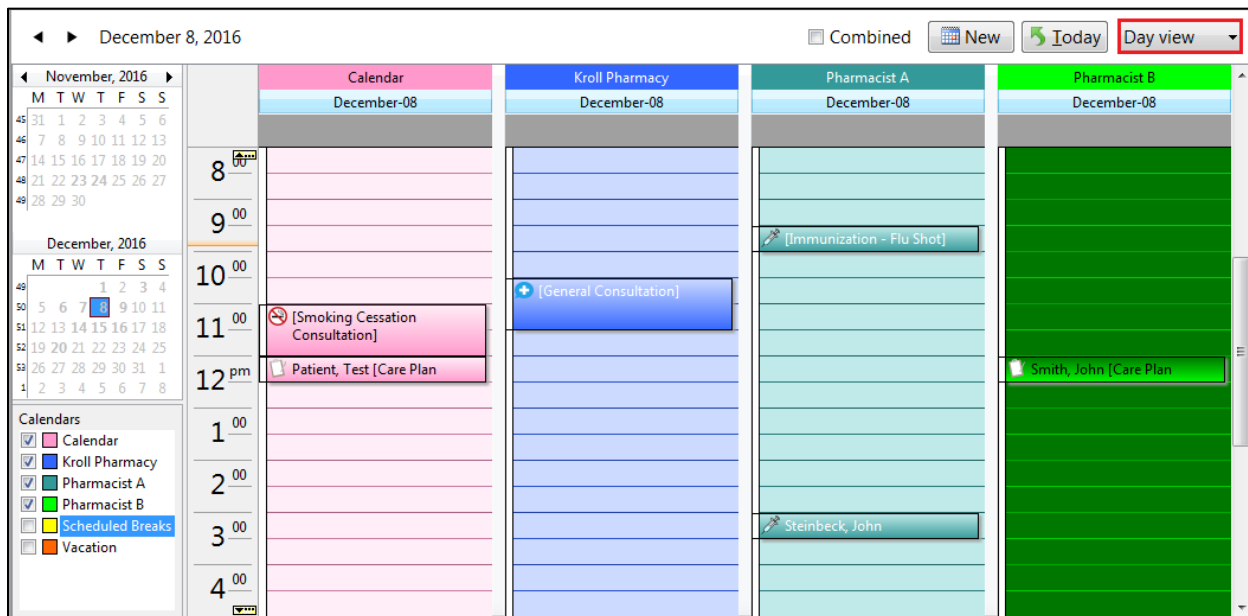
Month view:



Week view:

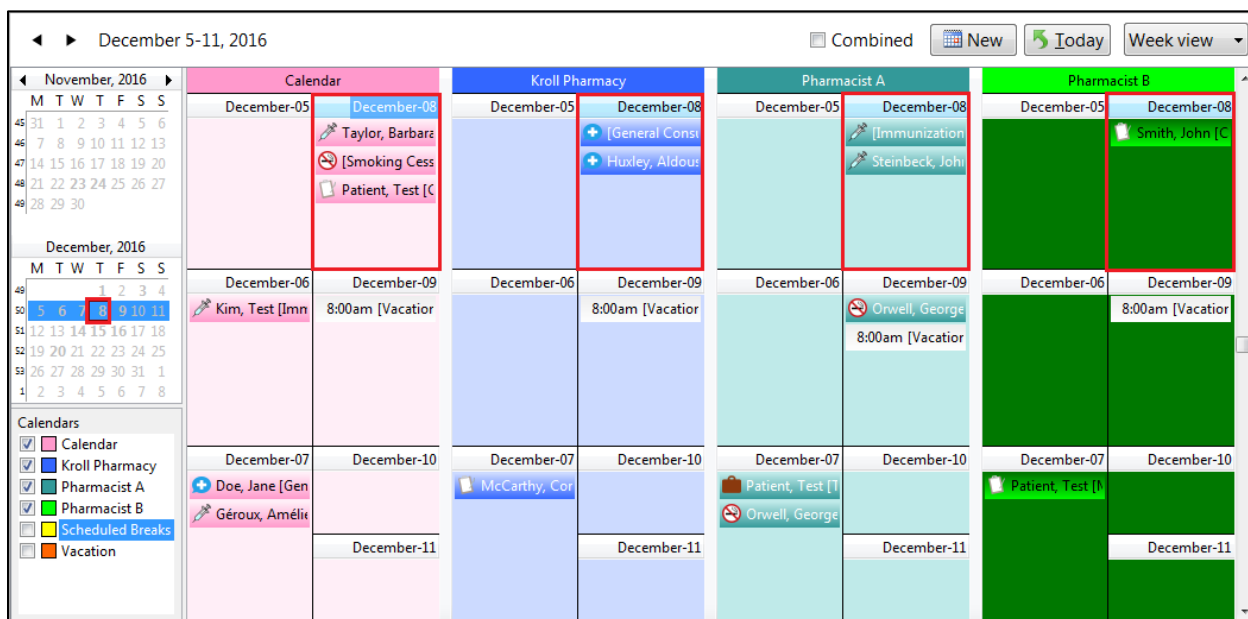


Day view:



The screenshot shows the 'Day view' of an appointment calendar for December 8, 2016. The interface includes a navigation bar at the top with buttons for 'Combined', 'New', 'Today', and 'Day view' (which is highlighted). Below the navigation bar, there are four main columns representing different entities: 'Calendar', 'Kroll Pharmacy', 'Pharmacist A', and 'Pharmacist B'. Each column has a header for the date 'December-08'. The 'Calendar' column shows a timeline from 8:00 am to 4:00 pm with appointments like '[Smoking Cessation Consultation]' and 'Patient, Test [Care Plan]'. The 'Kroll Pharmacy' column shows a '[General Consultation]' appointment. The 'Pharmacist A' column shows an '[Immunization - Flu Shot]' appointment and a 'Steinbeck, John' appointment. The 'Pharmacist B' column shows a 'Smith, John [Care Plan]' appointment. On the left side, there are two small calendar views for November and December 2016, and a 'Calendars' section with checkboxes for 'Calendar', 'Kroll Pharmacy', 'Pharmacist A', 'Pharmacist B', 'Scheduled Breaks', and 'Vacation'.

If you click the **Today** button, the Calendar will highlight today's date in each displayed calendar:



The screenshot shows the 'Week view' of an appointment calendar for December 5-11, 2016. The interface includes a navigation bar at the top with buttons for 'Combined', 'New', 'Today', and 'Week view' (which is highlighted). Below the navigation bar, there are four main columns representing different entities: 'Calendar', 'Kroll Pharmacy', 'Pharmacist A', and 'Pharmacist B'. Each column has a header for the date 'December-05' and 'December-08'. The 'Calendar' column shows appointments for 'Taylor, Barbara', '[Smoking Cessation]', and 'Patient, Test [Care Plan]'. The 'Kroll Pharmacy' column shows appointments for '[General Consultation]' and 'Huxley, Aldous'. The 'Pharmacist A' column shows appointments for '[Immunization - Flu Shot]' and 'Steinbeck, John'. The 'Pharmacist B' column shows a 'Smith, John [Care Plan]' appointment. On the left side, there are two small calendar views for November and December 2016, and a 'Calendars' section with checkboxes for 'Calendar', 'Kroll Pharmacy', 'Pharmacist A', 'Pharmacist B', 'Scheduled Breaks', and 'Vacation'.

Virtual Consultation Appointments

This section explains how to create, modify, and delete virtual consultation appointments, and how to launch scheduled services directly from the Calendar.

Configuration

A Kroll representative must provision the section of **File > Configuration > Store > Interfaces > Pharmacy Link** and enable all of the options shown in the below.

Store Level Configuration Parameters

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

Point of Sale
Robotic
Central Fill
Outbound Communication
Outbound Fax
External Interfaces
Pharmacy Link
VoicePort
CanadaPost
RxTouch
PointClickCare

Narcotic Drug Schedules
G (Controlled): N (Narcotics) F2

☒ Combine Call Doctor Callback status
☒ Allow Pharmacist Extension for Refilling Regular Rx's with no Refills left
☒ Allow Call Doctor for Regular Rx's with no Refills left
☒ Allow Call Doctor for Narcotic Rx's with no Refills left
☒ Allow Care Giver Registration
☒ Allow patients to submit photos of new prescriptions using Web or Mobile app.
☒ Allow patients to self-register

Auto generate PharmacyLink patient registration document for Network
Patient registration pairing codes expire after 7 days

Due Dates
New and Refill Drug Prescriptions PConnect-regular Ins
New and Refill Mixture Prescriptions PConnect-regular Ins
Refills Requiring Pharmacist Extension PConnect-extension Ins
Refills Requiring Doctor Callback PConnect-Doctor Callback Ins

When calculating due dates, defer items due within 15 minutes of closing until next business day.

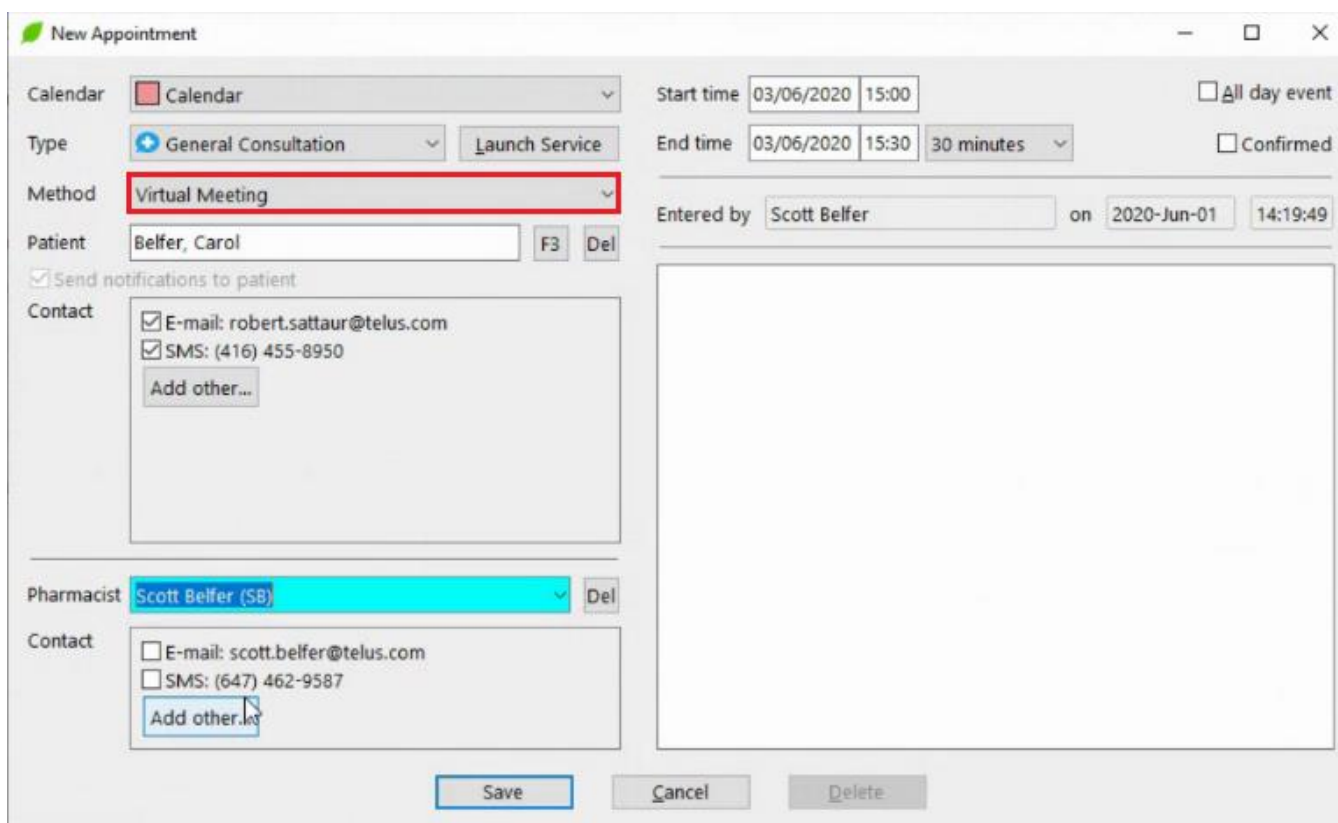
Patient Reports
☒ Allow Tax Receipts Report ☒ Allow Medical History Report ☒ Allow Medical Expenses Report
Configure Patient Tax Receipts Options Configure Medical History Options Configure Medical Expenses Options
Configure Patient Test Report

Send outbound SMS messages to Pharmacylink network: QA Scotts Virtual Office
Send outbound Email messages to Pharmacylink network: QA Scotts Virtual Office
Send appointment notifications using Pharmacylink network: QA Scotts Virtual Office

Networks Ins
Description
Demo International Centre Pharmacy
TELUS PharmaConnect STAGE Network
TELUS PharmaConnect Telus Pharmacy
Pure Integrative Pharmacy Scotts Pharmacy
Pure Integrative Pharmacy Scotts Pharmacy

Setting up a Virtual Consultation Appointment

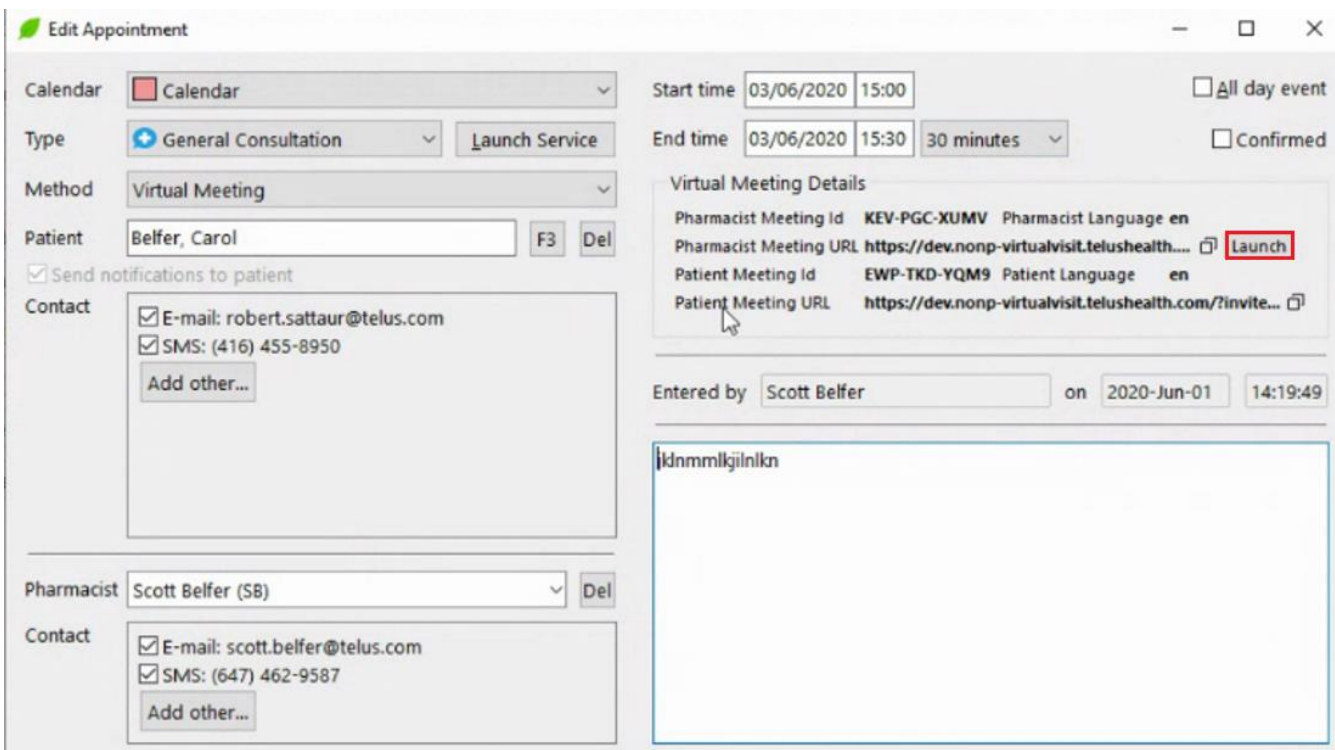
1. Select the Calendar tile from the Kroll Start Screen.
2. Click **New** or double click on the applicable calendar date.
3. The New Appointment form will be displayed. Complete the form with the information necessary including contact information for both the patient and the pharmacist. Ensure that the 'Method' is set to **Virtual Meeting**.



NOTE: If the pharmacist has their email and SMS number populated in the Users and Groups screen, their SMS and email will then be extracted from there directly into the Contact box of the Pharmacist.

4. Click Save. The appointment is now synched and will be displayed in the Calendar view and the patient will receive a confirmation message via email and/or SMS.

- When you are ready to start the virtual consultation, simply double click on the appointment from the calendar view and click on the Launch button in the Virtual Meeting details section.



Modifying an Appointment

- Double-click the appointment you want to modify.
- The **Edit Appointment** form will appear. Make the necessary changes and click **Save**. The patient will receive a notification via email and/or SMS that the appointment has been changed.

Deleting an Appointment

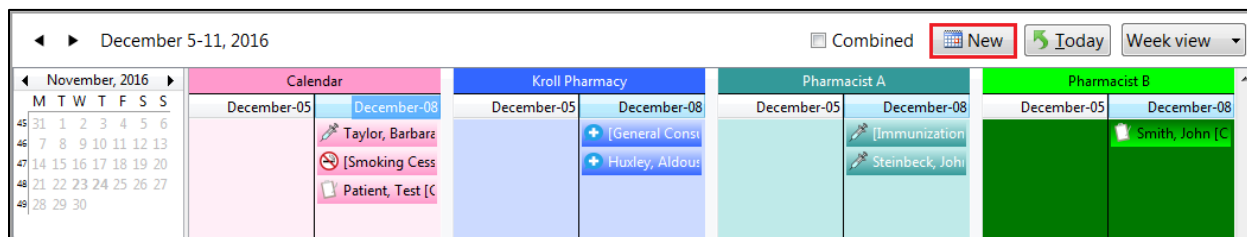
- Double-click the appointment you want to delete.
- The **Edit Appointment** form will appear. Click **Delete**.
- A prompt will appear asking if you are sure you want to delete the event. Answer **Yes**.
- The patient will receive an email and/or an SMS stating that the appointment has been cancelled, and the appointment will be removed from the calendar.

Appointments

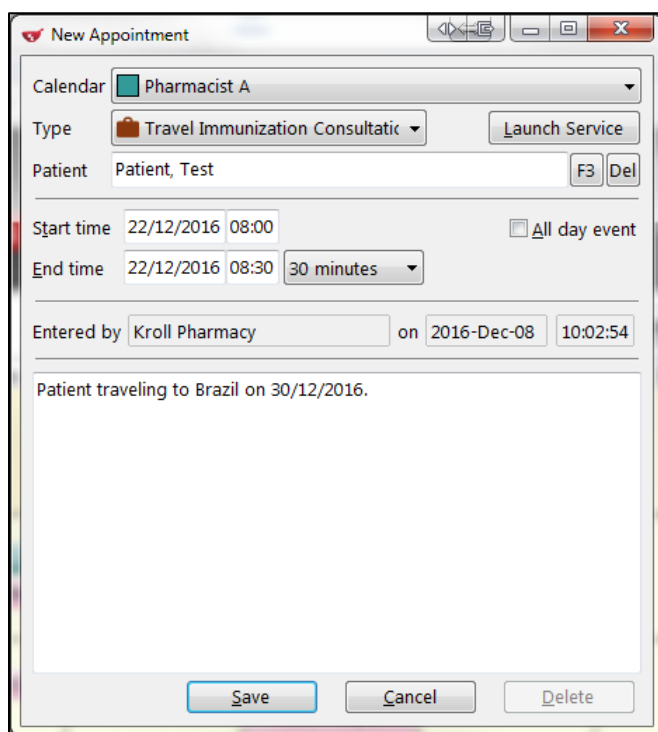
This section explains how to create, modify, and delete appointments, and how to launch scheduled services directly from the Calendar.

Inserting a New Appointment

1. Click **New**, or double-click the applicable calendar date.



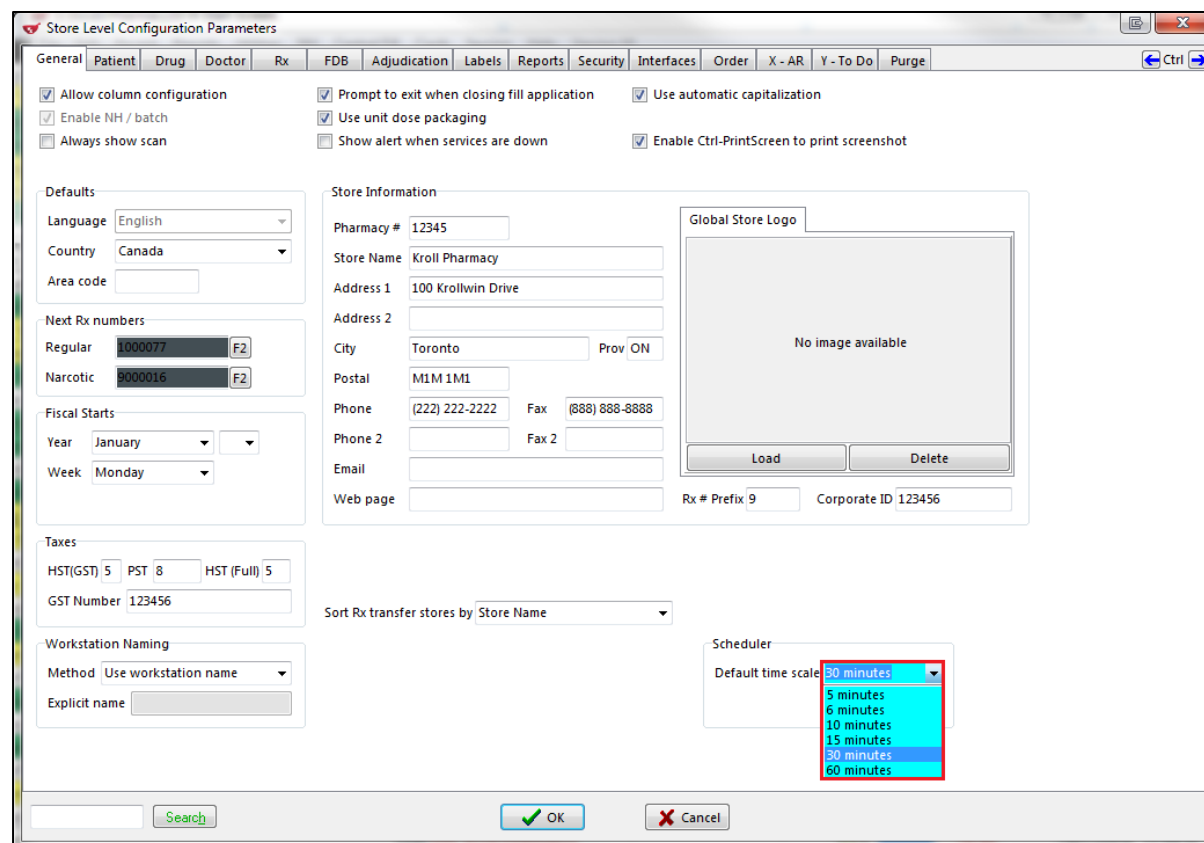
2. The **New Appointment** form will appear. Complete the form and click **Save**.



- **Calendar:** Select the calendar you want to assign the appointment to.
- **Type:** Select an appointment type.
- **Patient:** Click **F3** to optionally search for and select a patient. Once a patient is selected, the **Del** button can be used to remove the patient from the appointment.

- **Start time/End time:** Enter the start time. Select the length of the appointment from the list. The end time will update accordingly.

NOTE: The appointment length defaults to 30 minutes. This can be changed in the **Store Level Configuration Parameters > General** screen.



Store Level Configuration Parameters

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

☒ Allow column configuration ☒ Prompt to exit when closing fill application ☒ Use automatic capitalization
☒ Enable NH / batch ☒ Use unit dose packaging
☐ Always show scan ☐ Show alert when services are down ☒ Enable Ctrl-PrintScreen to print screenshot

Defaults
Language: English
Country: Canada
Area code:

Next Rx numbers
Regular: 1000077 F2
Narcotic: 9000016 F2

Fiscal Starts
Year: January
Week: Monday

Taxes
HST(GST) 5 PST 8 HST (Full) 5
GST Number: 123456

Workstation Naming
Method: Use workstation name
Explicit name:

Store Information
Pharmacy #: 12345
Store Name: Kroll Pharmacy
Address 1: 100 Krollwin Drive
Address 2:
City: Toronto Prov: ON
Postal: M1M 1M1
Phone: (222) 222-2222 Fax: (888) 888-8888
Phone 2: Fax 2:
Email:
Web page:

Global Store Logo
No image available
Load Delete

Rx # Prefix 9 Corporate ID 123456

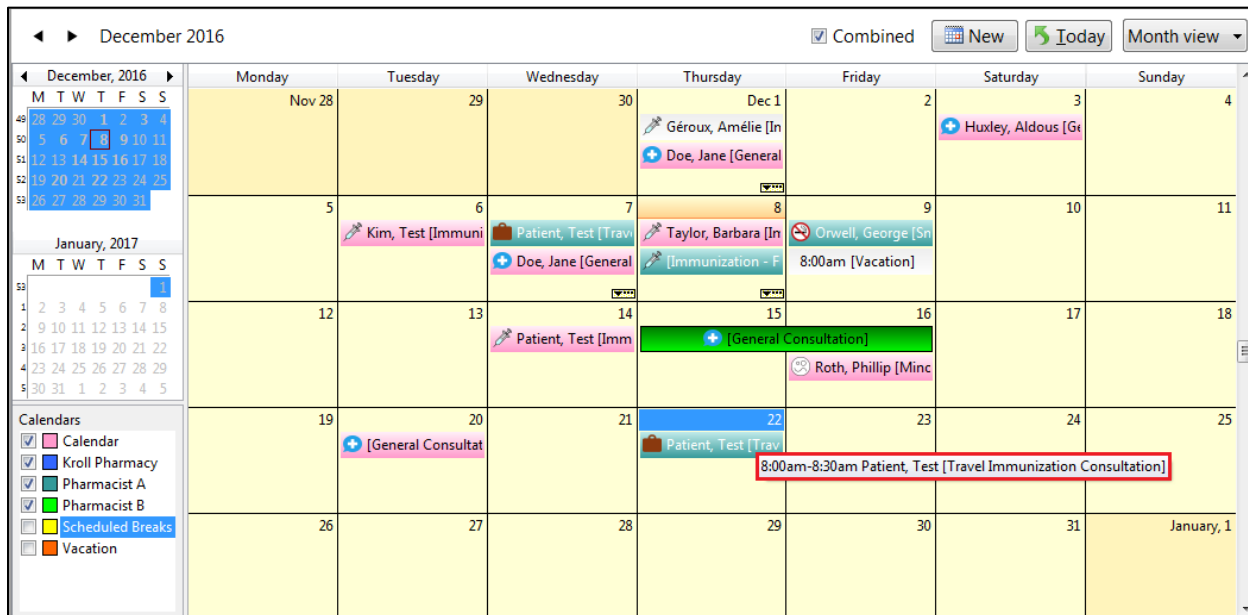
Sort Rx transfer stores by: Store Name

Scheduler
Default time scale: 30 minutes
5 minutes
10 minutes
15 minutes
30 minutes
60 minutes

Search OK Cancel

- **All day event:** Check this flag if the appointment will run all day. No start or end times can be selected when this flag is enabled.
- **Comments:** Enter any comments in the space provided.

- The appointment will be added to the calendar. Place the cursor over the appointment to see appointment details.

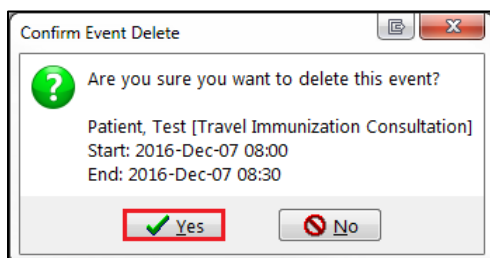


Modifying an Appointment

- Double-click the appointment you want to modify.
- The **Edit Appointment** form will appear. Make the necessary changes and click **Save**.

Deleting an Appointment

- Double-click the appointment you want to delete.
- The **Edit Appointment** form will appear. Click **Delete**.
- A prompt will appear asking if you are sure you want to delete the event. Answer **Yes**.



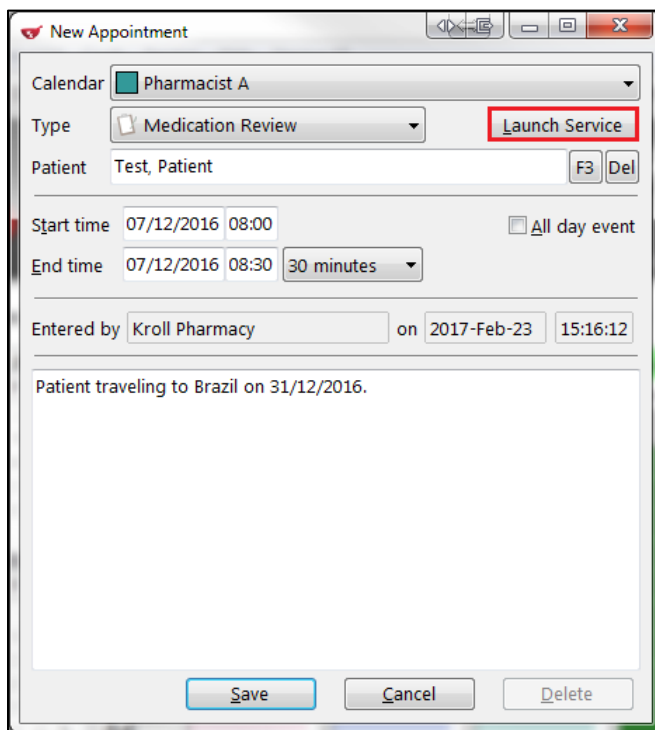
The appointment will be removed from the Calendar.

Launching a Service

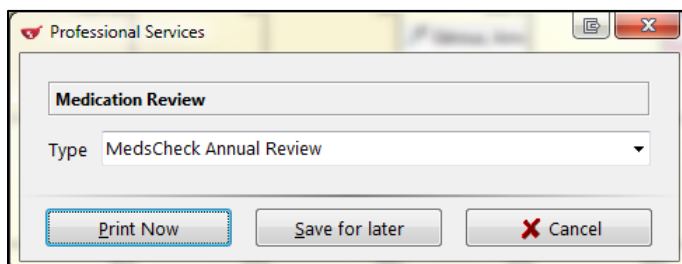
When an appointment for a service is due, the service can be launched directly from the Calendar screen.

NOTE: The **Launch Service** option is only available for appointments that have a service and a patient selected.

1. Double-click the appointment from the Calendar.
2. The **Edit Appointment** form will appear. Click **Launch Service**.

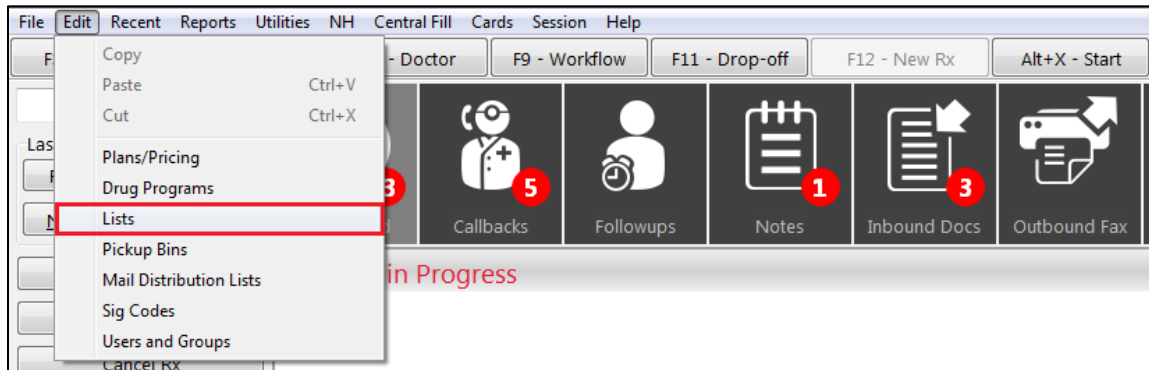


3. The **Professional Services** screen will appear with the service type selected. Select a sub **Type**, if one is available, and begin performing the service.



Configuration

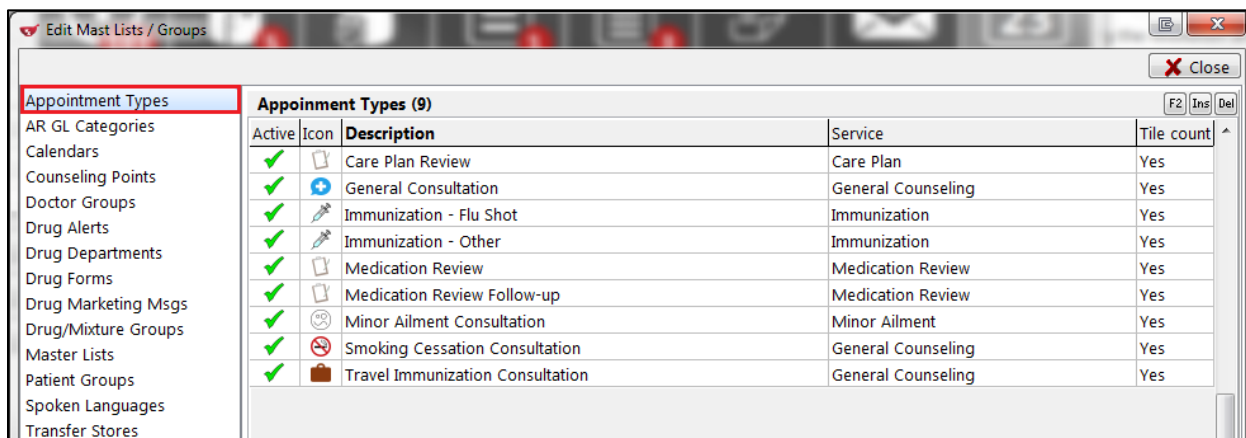
Appointment Calendar configuration settings can be accessed by selecting **Edit > Lists** from the **Alt+X - Start** screen.



This will call up the **Edit Mast Lists / Groups** screen where Appointment Types and Calendars can be added, modified, and deleted.

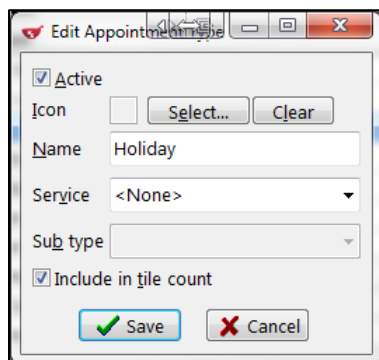
Appointment Types

Select **Appointment Types** from the **Edit Mast Lists / Groups** screen. A list of configured appointment types will appear.



Inserting an Appointment Type

1. Click **Ins** or press the **Insert** key on your keyboard.
2. The **Edit Appointment Type** form will appear. Complete the form and click **Save**.

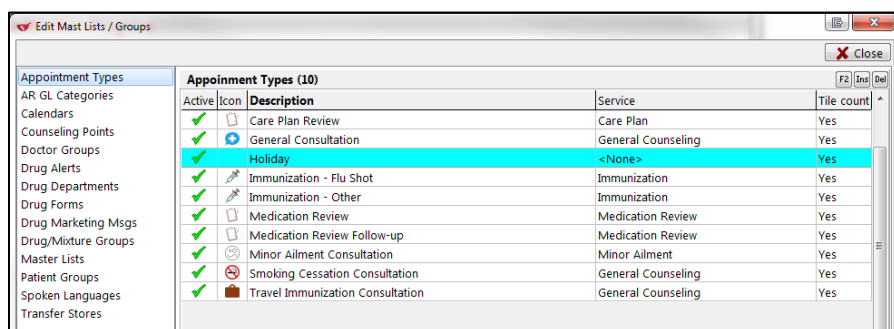












The form contains the following fields and controls:

- ☒ **Active**
- Icon**: ☐ **Select...** **Clear**
- Name**:
- Service**:
- Sub type**:
- ☒ **Include in tile count**
- Save** (green checkmark icon) **Cancel** (red X icon)

- **Active**: Enable this flag to make the appointment type selectable when creating a new appointment.
- **Icon**: To optionally add an icon to the appointment type, click **Select...** and locate an 16x16 pixel image file. To remove the icon from the appointment type, click **Clear**.
- **Name**: Enter the name of the appointment type.
- **Service**: Select a service associated with the appointment type. If the appointment type is not a service, leave this field blank.
- **Sub type**: A sub type may be automatically selected based on your **Service** selection.
- **Include in tile count**: Enable this flag to have instances of the appointment type included in the **Calendar** tile count.

The appointment type will be added to the **Appointment Types** list.



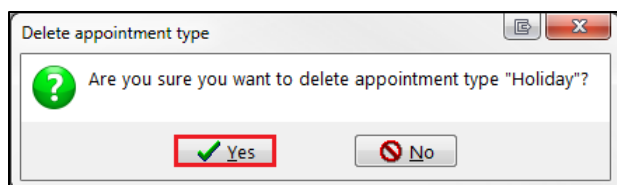
Appointment Types (10)				
Active	Icon	Description	Service	Tile count
<input checked="" type="checkbox"/>		Care Plan Review	Care Plan	Yes
<input checked="" type="checkbox"/>		General Consultation	General Counseling	Yes
<input checked="" type="checkbox"/>		Holiday	<None>	Yes
<input checked="" type="checkbox"/>		Immunization - Flu Shot	Immunization	Yes
<input checked="" type="checkbox"/>		Immunization - Other	Immunization	Yes
<input checked="" type="checkbox"/>		Medication Review	Medication Review	Yes
<input checked="" type="checkbox"/>		Medication Review Follow-up	Medication Review	Yes
<input checked="" type="checkbox"/>		Minor Ailment Consultation	Minor Ailment	Yes
<input checked="" type="checkbox"/>		Smoking Cessation Consultation	General Counseling	Yes
<input checked="" type="checkbox"/>		Travel Immunization Consultation	General Counseling	Yes

Modifying an Appointment Type

1. Select the appointment type you want to modify and click **F2**, or press the **F2** key on your keyboard.
2. The **Edit Appointment Type** form will appear. Make the necessary changes and click **Save**.

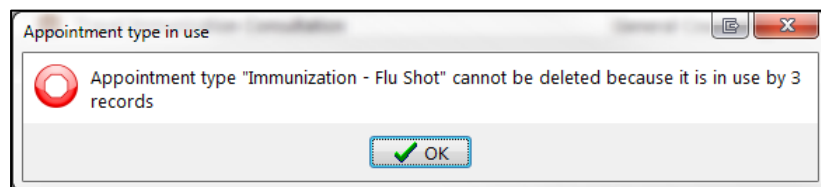
Deleting an Appointment Type

1. Select the appointment type you want to delete and click **Del**, or press the **Delete** key on your keyboard.
2. A prompt will appear asking if you are sure you want to delete the appointment type. Answer **Yes**.



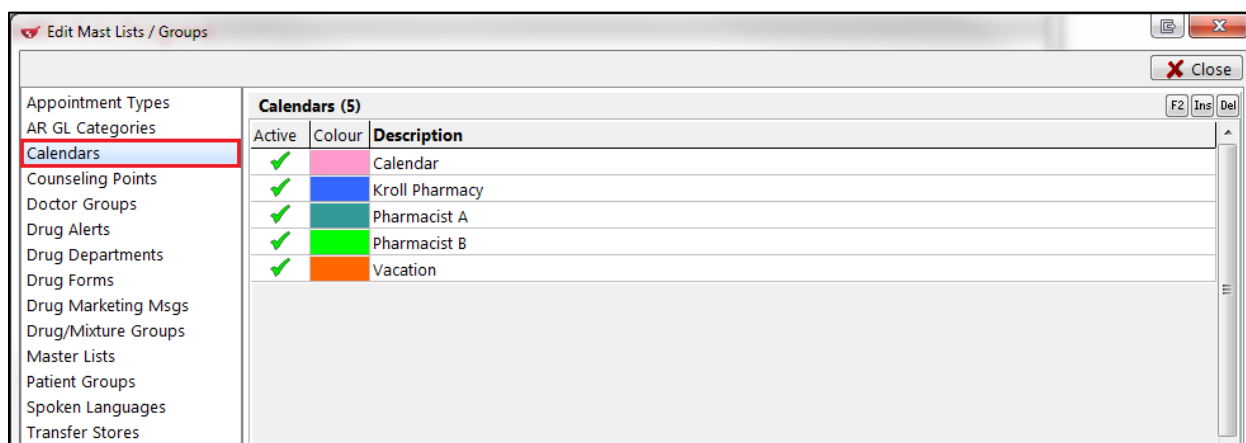
The appointment type will be removed from the **Appointment Types** list.

NOTE: If there are active appointments associated with the appointment type, the following prompt will appear if you attempt to delete it:



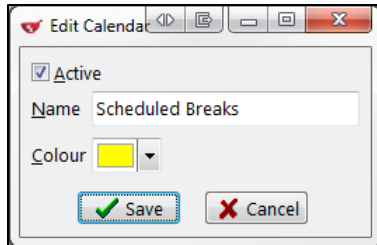
Calendars

Select **Calendars** from the **Edit Mast Lists / Groups** screen. A list of configured calendars will appear.



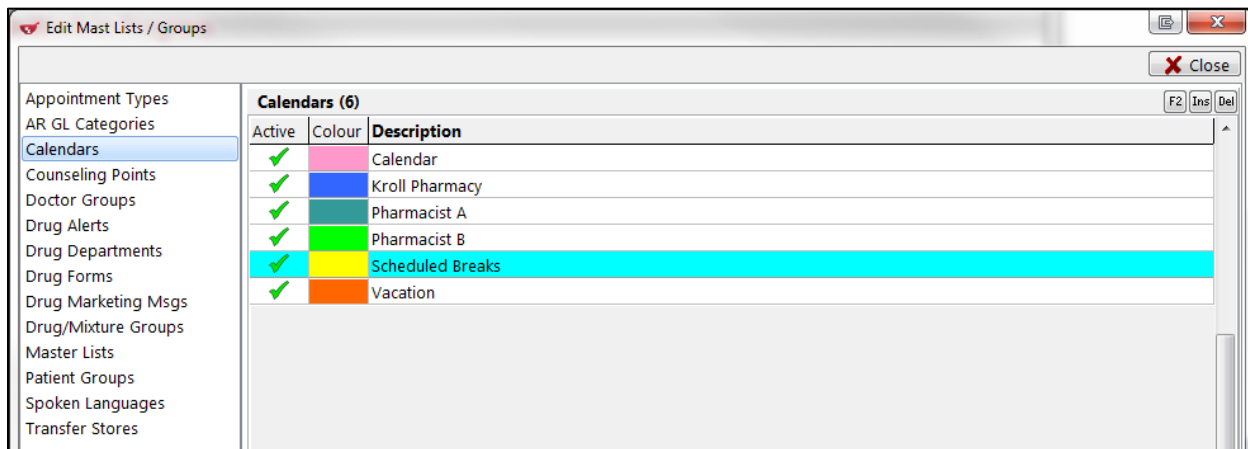
Inserting a Calendar

1. Click **Ins** or press the **Insert** key on your keyboard.
2. The **Edit Calendar** form will appear. Complete the form and click **Save**.



- **Active:** Enable this flag to make the calendar selectable when creating a new appointment.
- **Name:** Enter the name of the calendar.
- **Colour:** Select the colour you want associated with the calendar. This will default to black if no colour is selected.

The calendar will be added to the **Calendars** list.

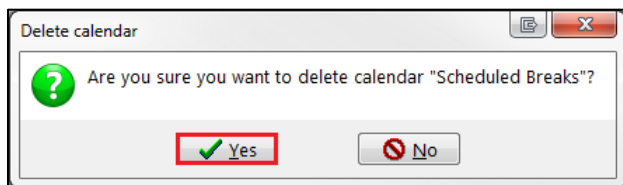


Modifying a Calendar

1. Select the calendar you want to modify and click **F2**, or press the **F2** key on your keyboard.
2. The **Edit Calendar** form will appear. Make the necessary changes and click **Save**.

Deleting a Calendar

1. Select the calendar you want to delete and click **Del**, or press the **Delete** key on your keyboard.
2. A prompt will appear asking if you are sure you want to delete the calendar. Answer **Yes**.



The calendar will be removed from the **Calendars** list.

NOTE: If there are active appointments associated with the calendar, the following prompt will appear if you attempt to delete it:

