

Online Appointment Booking

User Guide

March 2021

Table of Contents

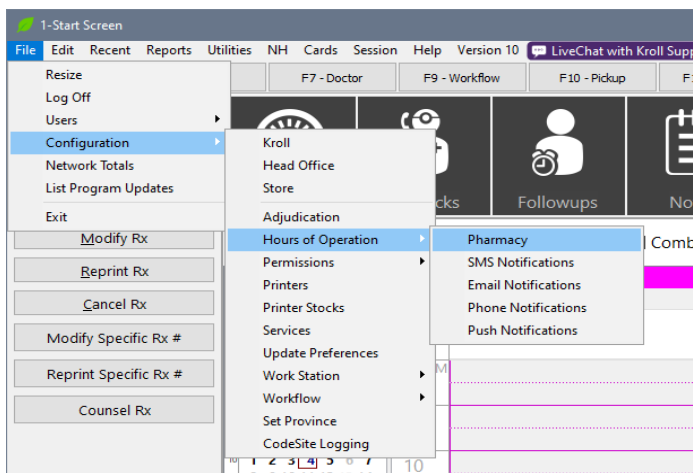
Overview	2
Hours of Operation	2
Holiday Hours	4
Notification Settings	4
SMS Notification Settings	5
Email Notifications	6
New Calendar Utilities	7
Create Public Appointment Slots	8
Scenario 1:	10
Scenario 2:	11
Scenario 3	12
Deleting Appointments	13
Booking an Appointment Online	16
The Pharmacy Landing Page	16
Booking an Appointment	17
Service Types	17
Selecting dates and times	18
Collection of Personal Information for Appointment Booking	20
Sample Appointment Notifications	21
Sample SMS Notification	21
Sample Email Notification	23
Completing a Scheduled Appointment	24
ADT Wizard	24
Immunization Module	29
Electronic Immunization	32
Electronic Immunization OFF (Paper Based)	33
Resources	34
Online Appointment Booking - Addons	34
Promotional Video	34
Contact Information	34
Sales	34
Technical Support	34

Overview

TELUS Health has added new functionality to its Kroll platform to allow pharmacies to implement pandemic readiness for related services and enhance the Kroll Calendar to promote the ability for patients to book appointments for supported pharmacy services through secure, integrated portals. The following guide allows pharmacy users to navigate this new functionality end to end and support their patient's use of the product as well.

Hours of Operation

Before using your Kroll Calendar and enabling your patients to book online, you'll need to configure your store hours. This is important, because you don't want to schedule any appointments outside of your normal business hours.



The screen below allows you to configure your store hours. You have the option to select; Open, Closed, or 24 hours for the respective day. All times listed below are in 24h format.

Pharmacy Hours of Operation

Normal Hours of Operation

Sunday	Open	08:00	to	17:00
Monday	Closed	09:00	to	19:00
Tuesday	Open	09:00	to	17:00
Wednesday	Open	09:00	to	19:00
Thursday	Open	09:00	to	21:00
Friday	Open	08:00	to	20:00
Saturday	Open	08:00	to	20:00

Holiday Hours (1)

Date	Open/Closed	Open	Close	Comment
25/12/2021	Closed			

OK
Cancel

Holiday Hours

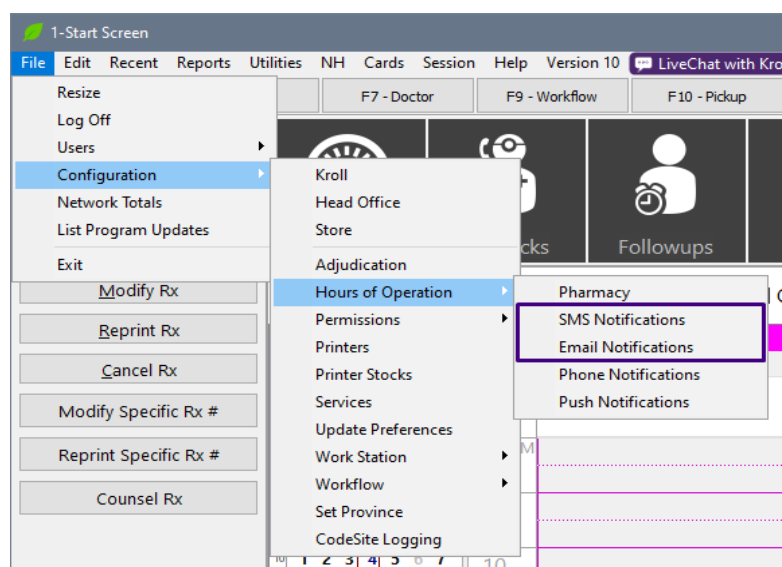
Additionally, you can configure 'Holiday Hours' in order to have specific hours or statuses.

Notification Settings

The online appointment system has the capability to notify patients about their appointments. As a pharmacist, you have control over when the system will send these notifications to the patient.

Kroll allows you to define when you want to allow or restrict your notifications to be sent to your customers. To configure your notifications, proceed to the menu option under;

File > Configuration > Hours of Operation > SMS Notifications / Email Notifications.



SMS Notification Settings

By default, the SMS Notifications (text messages) will be configured to transmit between the hours of **8am** and **10pm** every day. Similarly to the Store Hours of operation, you have the option to configure the time windows when notifications will be sent to your customers.

You have the option to configure each day of the week to

- A specified time window,
- Never
- Anytime

Depending on your hours of operation and your type of business, you may or may not want to change these settings.

SMS Notifications Time Windows

Normal Hours of Operation

Day	Time Window	Start	End
Sunday	Time Window	08:00	22:00
Monday	Never	08:00	22:00
Tuesday	Time Window	08:00	22:00
Wednesday	Anytime	08:00	22:00
Thursday	Time Window	08:00	22:00
Friday	Time Window	08:00	22:00
Saturday	Time Window	08:00	22:00

Holiday Hours (0)

Date	Time Frame	Start	End	Comment

OK Cancel

Email Notifications

Similar to SMS Notifications, you can restrict when these will be sent to your customer. By default, Email messages are generally less invasive, and are configured to send anytime during the day, every day.

However, if you prefer to restrict these notifications, you can do so through the settings, similar to how SMS is configured. (above)

Email Notifications Time Windows

Normal Hours of Operation

Sunday	Anytime
Monday	Anytime
Tuesday	Anytime
Wednesday	Anytime
Thursday	Anytime
Friday	Anytime
Saturday	Anytime

Holiday Hours (0)

Date	Time Frame	Start	End	Comment

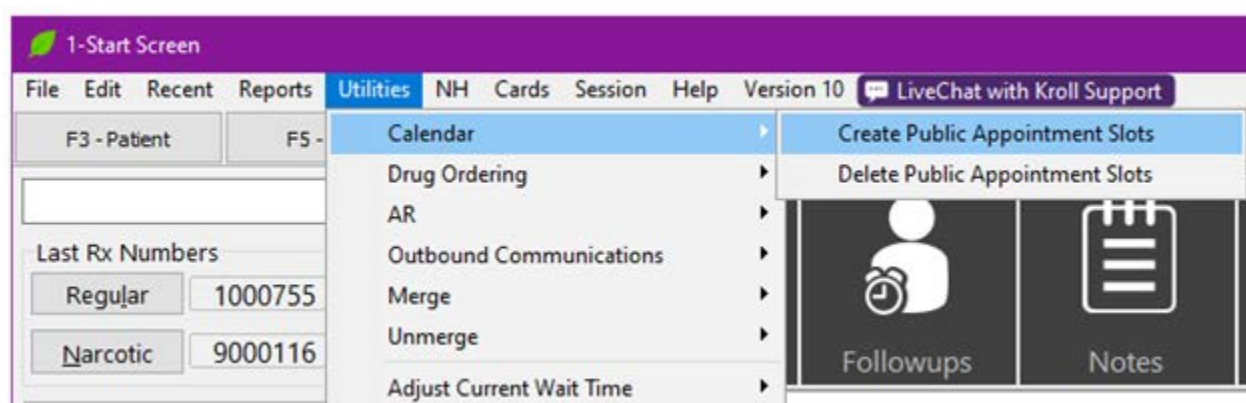
OK Cancel

New Calendar Utilities

To allow pharmacies to expose or share the available dates and time (we will refer to these as 'slots' throughout this guide) in their calendar to patients, two new utilities have been created. These utilities allow for multiple slots to be defined for Online booking and make the work of configuring them fast and efficient. The two utilities are:

- Create Public Appointment Slots
- Delete Public Appointment Slots

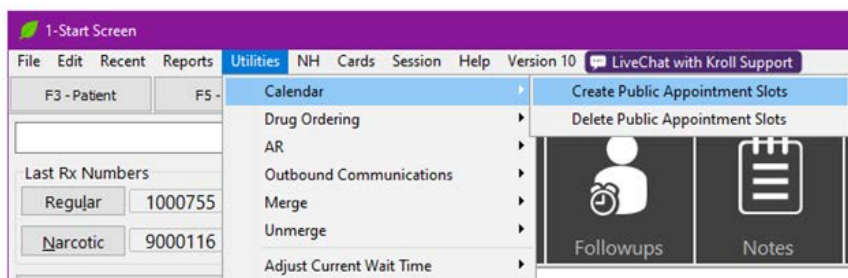
and can be found in the 'Utilities' menu at the top of the application when in the Calendar screen.



The Create Public Appointment Slots utility allows pharmacy staff to define any number of slots to be exposed on a secure TELUS Health supported, Pharmacy specific URL. The utility provides a high level of flexibility in the creation of these slots by allowing the pharmacy to define the date range that the slots are available, Day of week and time of day within that date range, which calendar and for which services. This level of flexibility allows pharmacies to adapt to available supply, pharmacy resources, hours of operation and more.

Create Public Appointment Slots

When you are ready to create your first block of appointments it is important to know in advance when you want these appointments available. Decide in advance when these appointments will take place, who will be available to provide service during them and what services you want to allow patients to be able to book time for. While it is possible at any time after creation to modify specific appointment slots, deleting slots after they are created could create an undesired experience for patients if they are in the process of booking a slot and it is deleted. When you are ready to create the appointment slots, click on the Calendar button on the top row of tiles on the Alt X screen and navigate to **Utilities > Calendar > Create Public Appointment Slots**.



The Create Public Appointment Slots utility is broken down into several key sections:

Create calendar appointment time slots

This allows you to create unreserved appointment time slots in the calendar for pharmacy services

- 1. Date range**
Start on End on
- 2. Days of the week**
☐ Sunday
☐ Monday
☐ Tuesday
☐ Wednesday
☐ Thursday
☐ Friday
☐ Saturday
- 3. Time slots**
Between and , every mins
- 4. Calendar**
- 5. Available appointments (for online reservations)**
☐ General Consultation
☐ Immunization - COVID

Date Range: This specifies that start and stop dates for the block of appointment slots you are going to create

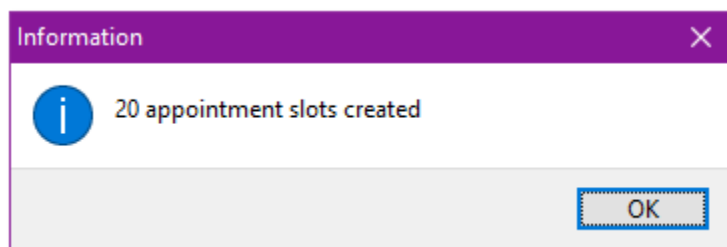
Days of the week: This is self-explanatory but is important in that you want to ensure that you expose slots on days when sufficient resources are available. Slots will be created only on the days of the week selected and within your Date Range

Time Slots: This allows the pharmacy to set the time of day that the appointment blocks will start and stop.

Calendar: This allows the pharmacy to define which calendar these slots will be published to. Pharmacies can use as many calendars as they want and many pharmacies have calendars for specific staff and their activities or to separate different operational activities. If you wish to add a new calendar, exit the utility and navigate to Edit > Lists > Calendars and add the calendar(s) you require. The new calendar(s) will be available to select the next time you use the Create Public Appointment Slots utility.

Available Appointments: This allows pharmacies to define what types of services can be booked in these slots. If you

When you have completed the process of setting the different fields and are ready to publish the slots, click the 'Create time slots' button. Kroll will now create the calendar slots and synchronize them with the web page to allow patients to select and book them.



Note: Kroll will be unavailable on the workstation you are performing this action on until it completes this process. If you are booking many slots over many days it can take a little time for Kroll to complete this action.

Sample Appointment Creation Scenarios

Scenario 1:

Pharmacy A has limited staff resources to provide services so they want to be pragmatic in their approach to publishing appointment slots. The pharmacy decides they can support two full hours each business day for appointments. In this case they configure the Create Public Appointment Slots utility as follows:

The screenshot displays the 'Create calendar appointment time slots' utility window on the left and the resulting calendar view on the right.

Create calendar appointment time slots utility:

- Title:** Create calendar appointment time slots
- Description:** This allows you to create unreserved appointment time slots in the calendar for pharmacy services
- Date range:** Start on 01/03/2021, End on 05/03/2021
- Days of the week:** Monday, Tuesday, Wednesday, Thursday, Friday (all selected)
- Time slots:** Between 17:00 and 19:00, every 30 mins
- Calendar:** A Calendar
- Available appointments (for online reservations):** Immunization - COVID (checked), Immunization - Flu Shot, Medication Review
- Buttons:** Create time slots, Cancel

Calendar View:

The calendar view shows the week of March 1-7, 2021. The days of the week are Monday through Sunday. The time slots are displayed in a grid. The slots for Monday through Friday are marked as 'Unreserved sl...'. The slots for Saturday and Sunday are marked as 'Unreserved sl...'. The calendar view also includes a 'Day Report' button, a 'New' button, a 'Today' button, a 'Filter' button, and a 'Week view' button.

Scenario 2:

Pharmacy B has more staff resources available than **Pharmacy A** and they choose to make slots available for several hours each day. During that time, the staff supporting the various appointments will work on a first available basis. They are all available at the same time and have the same skill sets. This allows the pharmacy to publish slots that are available more frequently.

Create calendar appointment time slots

This allows you to create unreserved appointment time slots in the calendar for pharmacy services

Date range

Start on 01/04/2021 End on 30/04/2021

Days of the week

☐ Sunday

☒ Monday

☒ Tuesday

☒ Wednesday

☒ Thursday

☒ Friday

☐ Saturday

Time slots

Between 10:00 and 15:00, every 20 mins

Calendar Calendar B

Available appointments (for online reservations)

☒ Immunization - COVID

☐ Immunization - Flu Shot

☐ Immunization - NEW

☐ Medication Review

Create time slots Cancel

April 5-11, 2021

Day Report

New

Today

Filter

Week view

	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	SUNDAY
8 AM							
9							
10	[Unr...]	[Unr...]	[Unr...]	[Unr...]	[Unr...]	[Unr...]	[Unr...]
11	[Unr...]	[Unr...]	[Unr...]	[Unr...]	[Unr...]	[Unr...]	[Unr...]
12 PM	[Unr...]	[Unr...]	[Unr...]	[Unr...]	[Unr...]	[Unr...]	[Unr...]
1	[Unr...]	[Unr...]	[Unr...]	[Unr...]	[Unr...]	[Unr...]	[Unr...]
2	[Unr...]	[Unr...]	[Unr...]	[Unr...]	[Unr...]	[Unr...]	[Unr...]
3	[Unr...]	[Unr...]	[Unr...]	[Unr...]	[Unr...]	[Unr...]	[Unr...]
4							

User: KRL (Kroll Support)

05/03/2021 08:20:49

Scenario 3

Pharmacy C has several resources available to perform services for patients booking online. Each of these resources has different availability and different skill sets. In this case they configure the Create Public Appointment Slots utility as follows:

Create calendar appointment time slots

This allows you to create unreserved appointment time slots in the calendar for pharmacy services

Date range
Start on 02/03/2021 End on 31/03/2021

Days of the week
☒ Sunday
☐ Monday
☒ Tuesday
☒ Wednesday
☐ Thursday
☐ Friday
☐ Saturday

Time slots
Between 10:00 and 13:00 , every 60 mins

Calendar Calendar B

Available appointments (for online reservations)
☐ Immunization - COVID
☒ Immunization - Flu Shot
☐ Medication Review

Create time slots Cancel

Create calendar appointment time slots

This allows you to create unreserved appointment time slots in the calendar for pharmacy services

Date range
Start on 02/03/2021 End on 31/03/2021

Days of the week
☐ Sunday
☒ Monday
☐ Tuesday
☐ Wednesday
☐ Thursday
☒ Friday
☐ Saturday

Time slots
Between 13:00 and 16:00 , every 60 mins

Calendar Calendar A

Available appointments (for online reservations)
☒ Immunization - COVID
☐ Immunization - Flu Shot
☐ Medication Review

Create time slots Cancel

Create calendar appointment time slots

This allows you to create unreserved appointment time slots in the calendar for pharmacy services

Date range
Start on 02/03/2021 End on 31/03/2021

Days of the week
☐ Sunday
☐ Monday
☐ Tuesday
☐ Wednesday
☒ Thursday
☐ Friday
☒ Saturday

Time slots
Between 10:00 and 16:00 , every 30 mins

Calendar Calendar C

Available appointments (for online reservations)
☒ Immunization - COVID
☐ Immunization - Flu Shot
☐ Medication Review

Create time slots Cancel

21

Dashboard

Callbacks

Followups

Notes

Inbound Docs

Outbound Fax

Mail

Calendar

March 8-14, 2021

☐ Combined
 ☒ Day Report
 ☐ New
 ☒ Today
 ☐ Filter
 ☐ Week view

March 2021	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	SUNDAY
<div>8 Mar</div> <div> <div>1</div> <div>2</div> <div>3</div> <div>4</div> <div>5</div> <div>6</div> <div>7</div> <div>8</div> <div>9</div> <div>10</div> <div>11</div> <div>12</div> <div>13</div> <div>14</div> <div>15</div> <div>16</div> <div>17</div> <div>18</div> <div>19</div> <div>20</div> <div>21</div> <div>22</div> <div>23</div> <div>24</div> <div>25</div> <div>26</div> <div>27</div> <div>28</div> <div>29</div> <div>30</div> <div>31</div> </div>	<div>8 Mar</div> <div> <div>1</div> <div>2</div> <div>3</div> <div>4</div> <div>5</div> <div>6</div> <div>7</div> <div>8</div> <div>9</div> <div>10</div> <div>11</div> <div>12</div> <div>13</div> <div>14</div> <div>15</div> <div>16</div> <div>17</div> <div>18</div> <div>19</div> <div>20</div> <div>21</div> <div>22</div> <div>23</div> <div>24</div> <div>25</div> <div>26</div> <div>27</div> <div>28</div> <div>29</div> <div>30</div> <div>31</div> </div>	<div>9 Mar</div> <div> <div>1</div> <div>2</div> <div>3</div> <div>4</div> <div>5</div> <div>6</div> <div>7</div> <div>8</div> <div>9</div> <div>10</div> <div>11</div> <div>12</div> <div>13</div> <div>14</div> <div>15</div> <div>16</div> <div>17</div> <div>18</div> <div>19</div> <div>20</div> <div>21</div> <div>22</div> <div>23</div> <div>24</div> <div>25</div> <div>26</div> <div>27</div> <div>28</div> <div>29</div> <div>30</div> <div>31</div> </div>	<div>10 Mar</div> <div> <div>1</div> <div>2</div> <div>3</div> <div>4</div> <div>5</div> <div>6</div> <div>7</div> <div>8</div> <div>9</div> <div>10</div> <div>11</div> <div>12</div> <div>13</div> <div>14</div> <div>15</div> <div>16</div> <div>17</div> <div>18</div> <div>19</div> <div>20</div> <div>21</div> <div>22</div> <div>23</div> <div>24</div> <div>25</div> <div>26</div> <div>27</div> <div>28</div> <div>29</div> <div>30</div> <div>31</div> </div>	<div>11 Mar</div> <div> <div>1</div> <div>2</div> <div>3</div> <div>4</div> <div>5</div> <div>6</div> <div>7</div> <div>8</div> <div>9</div> <div>10</div> <div>11</div> <div>12</div> <div>13</div> <div>14</div> <div>15</div> <div>16</div> <div>17</div> <div>18</div> <div>19</div> <div>20</div> <div>21</div> <div>22</div> <div>23</div> <div>24</div> <div>25</div> <div>26</div> <div>27</div> <div>28</div> <div>29</div> <div>30</div> <div>31</div> </div>	<div>12 Mar</div> <div> <div>1</div> <div>2</div> <div>3</div> <div>4</div> <div>5</div> <div>6</div> <div>7</div> <div>8</div> <div>9</div> <div>10</div> <div>11</div> <div>12</div> <div>13</div> <div>14</div> <div>15</div> <div>16</div> <div>17</div> <div>18</div> <div>19</div> <div>20</div> <div>21</div> <div>22</div> <div>23</div> <div>24</div> <div>25</div> <div>26</div> <div>27</div> <div>28</div> <div>29</div> <div>30</div> <div>31</div> </div>	<div>13 Mar</div> <div> <div>1</div> <div>2</div> <div>3</div> <div>4</div> <div>5</div> <div>6</div> <div>7</div> <div>8</div> <div>9</div> <div>10</div> <div>11</div> <div>12</div> <div>13</div> <div>14</div> <div>15</div> <div>16</div> <div>17</div> <div>18</div> <div>19</div> <div>20</div> <div>21</div> <div>22</div> <div>23</div> <div>24</div> <div>25</div> <div>26</div> <div>27</div> <div>28</div> <div>29</div> <div>30</div> <div>31</div> </div>	<div>14 Mar</div> <div> <div>1</div> <div>2</div> <div>3</div> <div>4</div> <div>5</div> <div>6</div> <div>7</div> <div>8</div> <div>9</div> <div>10</div> <div>11</div> <div>12</div> <div>13</div> <div>14</div> <div>15</div> <div>16</div> <div>17</div> <div>18</div> <div>19</div> <div>20</div> <div>21</div> <div>22</div> <div>23</div> <div>24</div> <div>25</div> <div>26</div> <div>27</div> <div>28</div> <div>29</div> <div>30</div> <div>31</div> </div>

Calendars

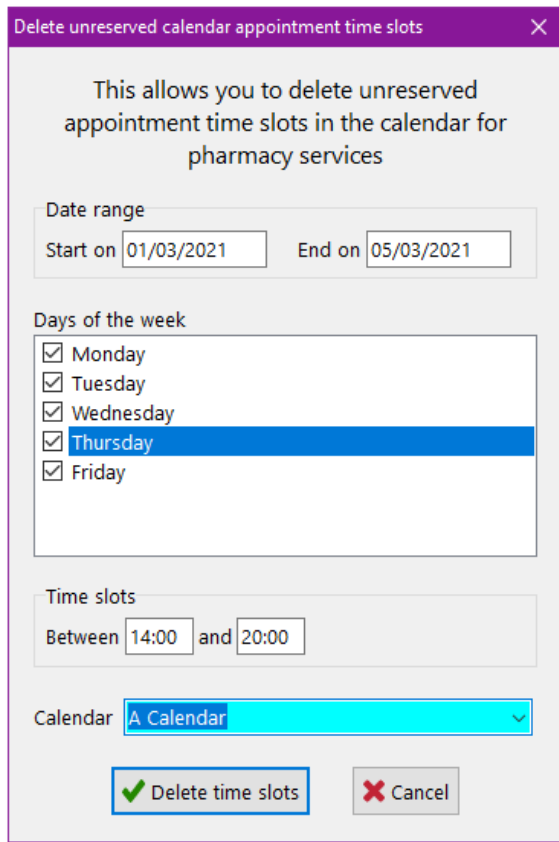
☒ Calendar A
 ☒ Calendar B
 ☒ Calendar C

User: KRL (Kroll Support)

02/03/2021 13:37:19

Deleting Appointments

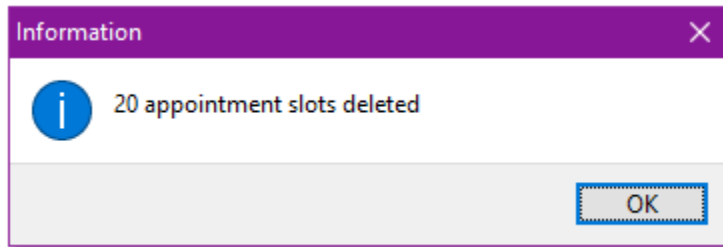
In the event that a pharmacy needs to delete all available slots that have not yet been booked, a utility has been included to minimize the effort required. The utility works very similar to the *Create Public Appointment Slots* utility.



The screenshot shows a utility window titled "Delete unreserved calendar appointment time slots". The window contains the following fields and controls:

- Date range:** "Start on" with a date input field containing "01/03/2021" and "End on" with a date input field containing "05/03/2021".
- Days of the week:** A list of days with checkboxes: Monday, Tuesday, Wednesday, Thursday (highlighted in blue), and Friday. All checkboxes are checked.
- Time slots:** "Between" with a time input field containing "14:00" and "and" with a time input field containing "20:00".
- Calendar:** A dropdown menu showing "A Calendar".
- Buttons:** "Delete time slots" (with a green checkmark icon) and "Cancel" (with a red X icon).

In the image above the utility is set up to locate all appointments between the defined start and stop dates, on the specified days of the weekend between the defined start and stop times in Calendar A. When the 'Delete time slots' button is clicked the process will find all **Unbooked** slots and delete them. It will not delete booked slots.



If slots have been booked and need to be managed (cancelled or deleted) they need to be managed individually. Deleting a booked slot in Kroll, removes the patient from the slot and makes it unreserved.

If you no longer want the slot to be available for online booking, you will need to delete it once the patient is cleared from it.

March 8-14, 2021 ☐ Combined Day Report New

March, 2021	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
1 2 3 4 5 6 7	8 Mar	9	10	11	12
8 9 10 11 12 13 14	1:00pm [Unre...]				
15 16 17 18 19 20 21	2:00pm [Unre...]				
22 23 24 25 26 27 28	3:00pm [Unre...]				
29 30 31					


Calendar A

April, 2021

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
8 Mar	9	10	11	12
	10:00am [Unre...]	10:00am [Unre...]		
	11:00am [Unre...]	11:00am [Unre...]		
	12:00pm [Unre...]	12:00pm [Unre...]		

Calendar B

Confirm Event Delete

 This is an Unreserved slot.
Deleting it will prevent the slot from being reserved online.
Are you sure you want to delete this Item?

Start: 2021-Mar-01 16:00
End: 2021-Mar-01 16:30

☒ Yes ☐ No

Booking an Appointment Online


To facilitate the ability for patients to view open slots in the calendar in Kroll, TELUS Health has created a site that facilitates the required steps to book an appointment in pharmacy. This site is unique to each pharmacy and securely connects to the Kroll instance for integration of the booking of the appointment, collection and display of the patient information related to the appointment and where applicable the collection of responses to electronic screening questionnaires back into Kroll. This site will save pharmacies considerable time related to administration and more importantly allows guests to request appointments without already having a profile in Kroll.

The Pharmacy Landing Page

When a patient clicks on the link to navigate to the Online Appointments landing page, they are presented with the pharmacy information and an inset map displaying the pharmacy's physical location. This ensures that the patient knows where they are booking the appointment. The page contains two simple features: Booking an appointment and managing an existing appointment.

Your Pharmacy

1234 PHARMACY STREET
UNIT 66
TORONTO ON M9W 4P5
Phone: (416) 383-1010
appointments@yourpharmacy.com
<https://telus.pharmacylinkqa.ca/Appointment/263e16>
0a-bc8a-49c2-8932-cf9403075d8



Book an Appointment

Select the type of appointment you would like to book

COVID-19 Vaccination ▼

Search

Manage an Appointment

Booking Reference Number

Last Name

Manage

Booking an Appointment

Booking an appointment is broken into 2-3 steps depending on the nature of the patient's relationship with the pharmacy. Guests require an additional step to provide a few additional fields.

Service Types

To start the process of booking an appointment, patients are asked to select the type of service they want to book the appointment for. The site will then query the Kroll instance for available slots related to that service type. Once the patient has selected the type of service they wish to book for (EG/ COVID-19 Immunization or Influenza Immunization) they click 'Search' to display the available slots.

[< Back](#)

Pick a Date and Time

COVID-19 Vaccination

PharmaConnect Test Pharmacy

123 Main St
Anytown, ON A1B 2C3
Phone: (416) 555-1212
appointments@email.com
<https://telus.pharmacylinkqa.ca/Appointment/482975d8-229f-4428-bef5-d25bb5db0702>

Select a Day

☒ Tomorrow☐ Thursday, Mar 4☐ Friday, Mar 5[Other Dates](#)

Select a Time for Wednesday, March 03, 2021

☐ 11:00 AM☐ 12:00 PM☐ 2:00 PM☐ 2:45 PM[Continue](#)

Selecting dates and times

When the patient arrives at the next step in the process they are asked to select a date and time for their appointment. Initially the available slots for the next available 3 days are displayed. If the patient wishes a date further into the future they can click the link underneath the displayed dates labelled 'Other Dates'. This will expand the view to the first seven dates available and provide a date picker should the patient wish to book further into the future.

Pick a Date and Time

COVID-19 Vaccination

PharmaConnect Test Pharmacy

123 Main St
Anytown, ON A1B 2C3
Phone: (416) 555-1212
appointments@email.com
<https://telus.pharmacy/linka.ca/Appointment/482975d8-229f-4428-bef5-d25bb5db0702>

Select a Day

☒ Tomorrow

☐ Thursday, Mar 4

☐ Friday, Mar 5

☐ Saturday, Mar 6

☐ Monday, Mar 8

☐ Tuesday, Mar 9

☐ Wednesday, Mar 10

Select a Specific Date

Mar 11, 2021

☐ Thursday, Mar 11



Select a Time for Wednesday, March 03, 2021

☐ 11:00 AM

☐ 12:00 PM

☐ 2:00 PM

☐ 2:45 PM

Continue

Once a Date and Time are selected the patient the patient clicks Continue to proceed to the next step in the booking.

Note: When the patient selects a Date and Time there is a 10 minute 'hold' on the slot they have selected. This 'hold' removes that time slot from any other user's view so there is not a conflict between multiple users attempting to book the same date and time. If the user does not complete the booking process in 10 minutes, the slot is released and can be selected by other users. This prevents unwanted blocking of dates and times.

Collection of Personal Information for Appointment Booking

The process of booking an appointment requires the patient to identify who the appointment is for. This information is used to create a minimal patient profile in Kroll and provide notifications to the patient about the appointment.

The information collected is used for two purposes:

1. To record in Kroll who the appointment is for
2. To provide notifications to the patient

If the patient is a guest at the pharmacy they can identify that they are a new patient by clicking the 'I'm a new patient' checkbox which will display an expanded list of fields that include Address, City, Prov and Postal Code. The additional data will allow the pharmacy to build a more complete profile in Kroll should they need to.

When the patient has completed filling in the fields, they must agree to the terms and conditions as well as the privacy policy (both are available for review prior to submission by clicking on either). They must additionally respond to the reCaptcha confirming they are a human user and then they can click 'Book' to complete the process. Patients are presented with a confirmation screen with the details of the appointment and will receive notifications via email and or SMS.

The appointment was
booked successfully

**PharmaConnect Test Pharmacy**

123 Main St
Anytown, ON A1B 2C3

In-Person

Booking reference number: S37-XF-SVL

Service Type: COVID-19 Vaccination

Date: Thursday, March 04 at 2:00 PM

Test User

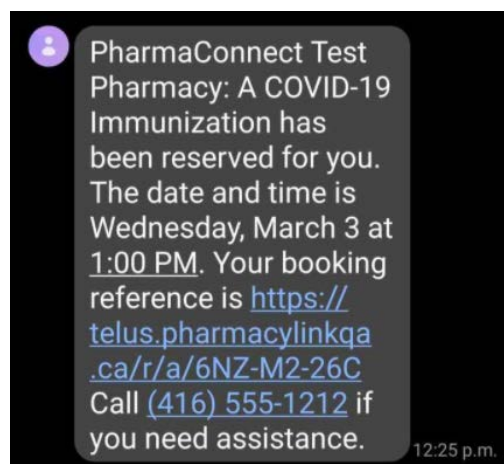


Done

Sample Appointment Notifications

Sample SMS Notification

This is a sample of an SMS Appointment Notification sent to the patient when the appointment is created. Similar messages are sent to the patient when the appointment date and time are changed by the pharmacy (Appointment Changed), when the appointment is cancelled by either the pharmacy or the patient through the Appointment Management page (Appointment Cancelled) and a few hours prior to the appointment the patient receives an Appointment Reminder message. The URL provided in SMS notifications will bring the patient to the landing page with the Booking Reference number pre-populated.



Sample Email Notification

The email notification has much more detail and allows for the communication of all relevant appointment details and a button that allows the patient to click and be brought directly to the Appointment Details page. Like SMS notifications patients will receive notifications when the appointment is changed or cancelled and a reminder prior to the appointment.



**You have successfully booked
an appointment at
PharmaConnect Test
Pharmacy.**

Hello Test User,

You have successfully booked an appointment for a COVID-19 vaccination at PharmaConnect Test Pharmacy.

Your appointment is scheduled for:

Thursday, March 4 at 2:00 PM

Your appointment is at:

**PharmaConnect Test Pharmacy
1 Claire Road W
Guelph, ON, N1L 0A6
(416) 555-1212**

Your Booking Reference Number is: S37-XF-SVL

To view the appointment details or if you need to cancel, click the button below:

[View My Appointment](#)

Cordially,

Your PharmaConnect Test Pharmacy team.

Please do not reply directly to this message. Messages received to this address will not be processed. If you no longer wish to receive email communication from TELUS Health, unsubscribe [here](#).

©2021 TELUS. All rights reserved.

powered by 

Completing a Scheduled Appointment

When a patient has submitted an appointment following the process documented in this guide, the appointment in the Kroll Calendar is updated with their details. These details are not yet connected to a patient profile in Kroll. In order to take advantage of the full integration features of the module, pharmacies will need to adapt to a potentially new process. The ADT Wizard will allow you to take the data elements collected from the patient when they booked the appointment and use them effectively.

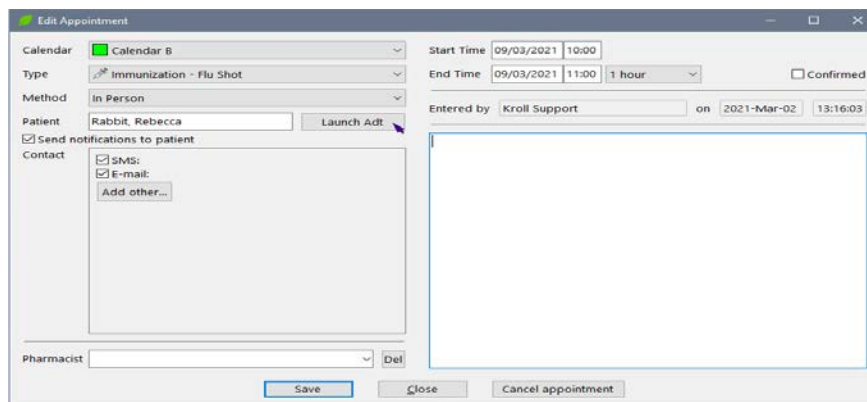
ADT Wizard

The ADT Wizard is a feature in Kroll designed primarily for pharmacies that support patients in various types of facilities and who have their medications managed by a healthcare provider. ADT is short for Admission, Discharge and Transfer but has a very effective use with this module. The ADT wizard can be accessed via two distinct points of entry.

1. On the F9 workflow screen on a tab on the right side panel as shown below:

Effective Date	Type	Description	Patient	Nursing home
02/03/2021 06:	Admission	New Patient - CA	User, Text	Nursing home

- From within a booked appointment entry in the Kroll Calendar. When a patient books an appointment the appointment is linked to a 'Pending' record and that record must be resolved before the service can be provided to the patient.



Note: It is an important operational best practice to have pharmacy staff continually check the ADT queue and stay on top of the records in it. This ensures that the full value of the calendar integration is realized and when patients arrive for the appointment, your team focuses on delivering the service, not administration.

When a patient books an appointment, they are potentially unknown in Kroll. In order to make effective use of the patient information the wizard will compare the information submitted against existing profiles in Kroll.

ADT Wizard

Patient selection page 1
Please select the correct patient for the ADT message

ADT Message: New Patient - QA

This request is limited to new patients or linking to an existing patient without changes.

Incoming ADT Patient

Last Name: User

First Name: Test

Address 1: 321 Alternate St

Address 2:

City: Anytown Prov: ON

Postal Code: POA1CO

Birthday: 01/01/1968 Age: 53

Gender: M

Home Phone: Ext:

Work: Ext:

PHN:

Selected Patient

Patient: <10 potential patients found> Search

Last Name: Lucas, Jimmy

First Name: Crx, Test

Address 1: Pat 2, Test

Address 2: Pat 1, Test

City: Testtest, Test

Postal Code: Dog, Test

Birthday: Test, Test

Gender:

Home Phone: Ext:

Work: Ext:

PHN:

Finish Cancel

(Pat Search) User, Test

Recent Search

Last,First; Code; Phone; or Bill # ☐ Advanced

Searching By: Last Name, First Name

0 No Records Found

#	Last Name	First Name	Address	City	Age	Phone	Plan	Birth

Patient - User, Test

Patient View Profile

Last Name: User First Name: Test Salutation: Changed Save Cancel

Address 1: 321 Alternate St Address 2: City: Anytown Prov: ON Postal: P0A 1C0 Country: Canada Email: testpatient@mailinator. Send Quick Code: Family Doctor: F2 Clear

Phone Numbers (1) F2 Ins Del
Description: Phone
Cell: (416) 555-3226

Birthdate: 01/01/1968 Age: 53 years Gender: Male Language: English Height: Weight: Load Delete

Comments (0) F2 Ins Del
Topic: Comment:

Plans (0) F2 Ins Del
SubPlan Code: Group ID: Client ID: Expiry:

Allergies (0) Add Drug F2 Ins Del

Medical Conditions (0) F2 Ins Del

Groups (0) F2 Ins Del

General Family Copays Other Ctrl

Patient
☒ Active Alt. Last Name: Patient Type: Human Deceased On: F2

Prescriptions
Delivery Type: F2 Delivery Route: Price Group: <None> Drug line 1: Default (Brand) 2 Default (Generic) Double Count:

Consent
Privacy: Unknown Unit Dose: Type: <None> Cycle: <None> Price Group: <Default> (<None>)

Rx Totals
Rx Count: Dollar value: Reset date: Reset

☐ No Kroll Care ☐ No Wallet Card ☐ Compliance Calendar on Label

☐ Snap Caps Requested ID: ☐ Snap Caps Documented

If any exist the system will allow you to compare and confirm the profiles as new or existing and allow you to select an existing profile to attach to the appointment. If none are found, the system will allow you to create a new profile with the data submitted. This can vastly reduce the administrative tasks associated with creating appointments.

ADT Wizard

Patient update page 2/4

Please update the patient's info with the ADT info

Selected Patient: User, Test

ADT Message: New Patient - QA

Incoming ADT Patient Details

Last Name: User

First Name: Test

Salutation:

Gender: M

Birthdate: 01/01/1968

Height:

Weight:

Language (Written): English

Language (Spoken):

Email: testpatient@mailinator.com

Active: ☐ (not specified)

PHN:

Def. Doctor:

Doc Lic:

Local Patient Details

User

Test

Male

01/01/1968

No data on this date

No data on this date

English

testpatient@mailinator.com

☒

F2 Del

F2 Del

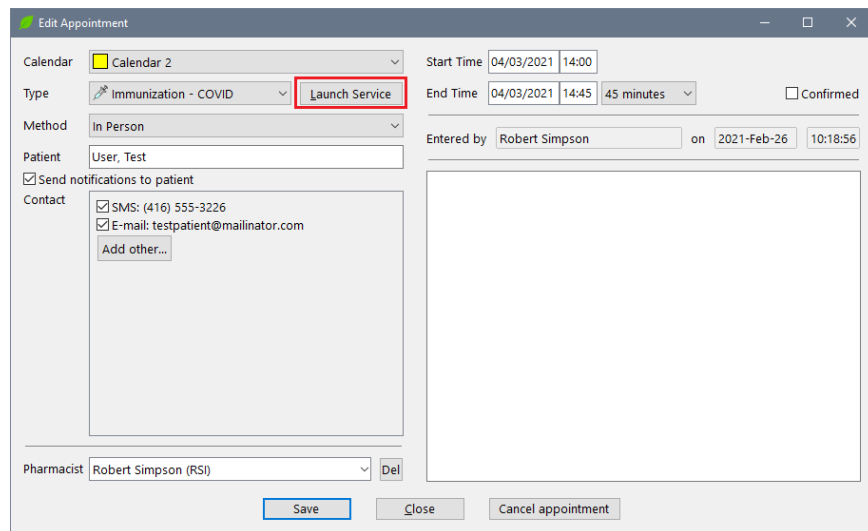
No image available

< Back Next > Cancel

If a profile is found that matches, the system will provide a comparison screen for the incoming information vs the existing profile so you can easily select any field you wish to update on the existing profile. To perform this action simply click the arrow between the fields you wish to update and the incoming data field will update the same field on the existing profile. The process is performed in 3 sections: Patient Details, Addresses and phone numbers. The system will provide comparison screens for each section and then when all fields are ready, a 'Finish' button is available to confirm you have completed the task. This further minimizes effort and allows the creation of a fully updated profile ready to use for the appointment.

Immunization Module

When the patient arrives at the pharmacy for their scheduled appointment the pharmacy staff will be required to launch the immunization module to provide the vaccination if that is the reason for the patient visit. To launch the immunization module, open the appointment by double clicking on the calendar entry and clicking the 'Launch Service' button as shown below:



The screenshot shows the 'Edit Appointment' window. The 'Calendar' dropdown is set to 'Calendar 2'. The 'Type' dropdown is set to 'Immunization - COVID', and the 'Launch Service' button is highlighted with a red box. The 'Method' dropdown is set to 'In Person'. The 'Patient' field contains 'User, Test'. The 'Send notifications to patient' checkbox is checked. The 'Contact' section shows 'SMS: (416) 555-3226' and 'E-mail: testpatient@mailinator.com'. The 'Entered by' field contains 'Robert Simpson' and the 'on' date is '2021-Feb-26'. The 'Pharmacist' dropdown is set to 'Robert Simpson (RSI)'. The 'Start Time' is '04/03/2021 14:00' and the 'End Time' is '04/03/2021 14:45' with a duration of '45 minutes'. The 'Confirmed' checkbox is unchecked. The 'Save', 'Close', and 'Cancel appointment' buttons are at the bottom.

If your pharmacy uses Electronic Immunization clicking the Launch Service button will launch the module with on screen prompts for most actions. Further, if using the Electronic version, your patient will receive an email in the hours prior to the appointment asking them to complete the pre-screening questionnaire which will be recorded into their profile as a Patient Immunization Record. The pre-screener asks them for their emergency contact information as well as the same questions in the same order as they appear in Kroll. You will be required to review this info when launching the service and any responses that indicate a clinical risk to the patient will prevent you from advancing any further in the immunization process and will need to be resolved before you can do so or the immunization will need to be refused and the reasons documented.

If your pharmacy does not use the electronic immunization module the service launches by prompting you to print the questionnaire, consent and emergency contact form that also records the information for Emergency Epinephrine Treatment and Follow Up doses.

If you are ready to start the immunization with the patient, click Perform Now, if not, click Save for Later.

The image shows a dialog box titled "Immunization". It has a dropdown menu for "Type" which is currently set to "COVID19". Below the dropdown are three buttons: "Perform Now", "Save for later", and "Cancel".

When the Immunization Module is launched, Kroll will guide you through the collection or verification of the collection of the data required to properly document an immunization. It begins with the emergency contact info for the patient. If the pharmacy makes use of the electronic immunization module, this info will be part of the pre-screening questionnaire sent to the patient. In this scenario, this screen will come pre-filled with the responses provided by the patient and should be reviewed and confirmed.

If the pharmacy is not using the electronic immunization module, the immunization details can be launched from the patient profile (F3) by clicking on Immunizations from the left menu.

The image shows the "F3 - Patient" screen. The top section displays patient information: Name (User, Test), Address (321 Alternate St), Birth (01/01/1968), Age (53 years), Sex (Male), and Phone (416) 555-3226. Below this is the "COVID19" section with a "Consent given by" field set to "User, Test". The "Emergency Contact" section is visible, showing a "Select Contact" dropdown set to "Free Jimmy" and fields for Last Name, First Name, Relationship, Daytime Phone, and Other Phone. The "Immunization" section on the right shows a list of immunizations with columns for Item, Type, Drug Name, Status, Product Status, Fee Status, Created, and Completed. The first entry is "COVID19" with a status of "Pending".

The image shows the "F3 - Patient" screen. The top section displays patient information: Name (User, Test), Address (321 Alternate St), Birth (01/01/1968), Age (53 years), Sex (Male), and Phone (416) 555-3226. Below this is the "COVID19" section with a "Consent given by" field set to "User, Test". The "Emergency Contact" section is visible, showing a "Select Contact" dropdown set to "Free Jimmy" and fields for Last Name, First Name, Relationship, Daytime Phone, and Other Phone. The "Immunization" section on the right shows a list of immunizations with columns for Item, Type, Drug Name, Status, Product Status, Fee Status, Created, and Completed. The first entry is "COVID19" with a status of "Pending".

The next step in the process is to collect or review the patient responses to the pre-screener and ensure the patient is safely eligible to obtain the vaccine.

1-Start Screen
File Edit View Profile Utilities Cards Session Help Version 10
F3 - Patient F5 - Drug F7 - Doctor F9 - Workflow F10 - Pickup F11 - Drop-off F12 - New Rx Alt+X - Start

COVID19
Consent given by User, Test F2

Patient User, Test Address 321 Alternate St
Birth 01/01/1968 53 years Male Plan Client ID Phone Cell (416) 555-3226
Allergies Conditions

Emergency Contact Patient Consent

Have you had a COVID vaccine? If so, which one did you receive and when did you receive it? <Not Answered>
Are you experiencing any cold, flu or COVID-19-like symptoms, even mild ones? Symptoms include: fever, chills, cough, shortness of breath, sore throat and painful swallowing, stuffy or runny nose, loss of sense of smell, headache, muscle aches, fatigue or loss of appetite <Not Answered>
Have you travelled to any countries outside Canada (including the United States) within the last 14 days? <Not Answered>
Did you provide care or have close contact with a person with confirmed COVID-19? <Not Answered>
Have you received a flu vaccine or any vaccine in the past 14 days? <Not Answered>
Do you have a new or changing neurological disorder? <Not Answered>
Have you had a serious reaction to a vaccine in the past? <Not Answered>
Have you ever had a serious reaction to polyethylene glycol (applicable to mRNA based vaccines only)? <Not Answered>
Have you ever had Guillain-Barre Syndrome within 6 weeks after receiving a vaccine? (A Yes answer is not a contraindication for mRNA based vaccines). <Not Answered>
Are you or do you think you might be pregnant? <Not Answered>
Are you currently taking any medication? <Not Answered>

Save for Later Refuse Immunization Print Consent

User: RSI (Robert Simpson) 0 04/03/2021 08:13:21

Immunization
Print Wallet Card
View
Patient Charting
Patient Documents (0)
Patient Immunizations (1)
Profile
All Rxs
Active Rxs
Active Rxs w/ Passtimes
Pricing Profile
Not Disp/OTC Profile
Questions Language
English
Français

Electronic Immunization

The online appointment booking system can leverage the use of the 'Electronic Immunization' capture.

TELUS recommends you have this option enabled, in order for your patients to have the added benefit of completing any questionnaires before arriving to their pharmacy.

Store Level Configuration Parameters

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

1 - General 2 - Pricing 3 - Prompting 4 - Nursing Home 5 - Background Rx Filling 6 - Workflow 7 - Counseling 8 - Immunization 9 - CeRx 1

☒ Enable electronic immunizations

☐ Require electronic signature for Pharmacists

☐ Require UPC Verification of Vaccine Product

☒ Allow to use non-influenza immunization products obtained externally

☒ Print immunization wallet card

Allow to use non-influenza immunization Rxs dispensed 30

Message on Receipt for patients eligible for Influenza shots

☒ Print for retail patients

☒ Print for NH patients

Electronic Immunization OFF (Paper Based)

Store Level Configuration Parameters

General	Patient	Drug	Doctor	Rx	FDB	Adjudication	Labels	Reports	Security	Interfaces	Order	X - AR	Y - To Do	Cleanup
1 - General	2 - Pricing	3 - Prompting	4 - Nursing Home	5 - Background Rx Filling	6 - Workflow	7 - Counseling	8 - Immunization	9 - CeRx	10 - ...					

☐ Enable electronic immunizations

☐ Require electronic signature for Pharmacists

☐ Require UPC Verification of Vaccine Product

☒ Allow to use non-influenza immunization products obtained externally

☒ Print immunization wallet card

Allow to use non-influenza immunization Rxs dispensed

Message on Receipt for patients eligible for Influenza shots

☒ Print for retail patients

☒ Print for NH patients

Resources

Online Appointment Booking - Addons

<https://www.telus.com/en/health/health-professionals/pharmacies/add-ons/online-appointment-booking>

Promotional Video

<https://www.youtube.com/watch?v=8ac6DUH1PAA>

Contact Information

Sales

<https://www.telus.com/health/contact/sales/pharmacies>

Or call us at:

1 800 263-5876 option 2

Monday to Friday, 9:00 AM to 5:00 PM (EST)

Technical Support

<https://www.telus.com/health/contact/support/pharmacies>

Or call us at:

1 800 263-5876

Available 24/7