

Documenting Rx Counseling



Contents

| | |
|---|----------|
| Configuration..... | 1 |
| Automatic and Manual Counseling | 3 |
| Automatic Rx Counseling | 3 |
| Manual Rx Counseling..... | 5 |
| Documenting Rx Counseling..... | 6 |
| Editing Counseling Points..... | 6 |
| Calling up an Rx to be Counseled..... | 7 |
| Counseling Accepted by Patient | 8 |
| Counseling Accepted by Agent | 9 |
| Counseling Rejected by Patient/Agent | 11 |
| Counseling Follow-up..... | 12 |
| Printing and Scanning the Prescription Counseling Worksheet | 13 |
| Viewing Counseling History | 16 |

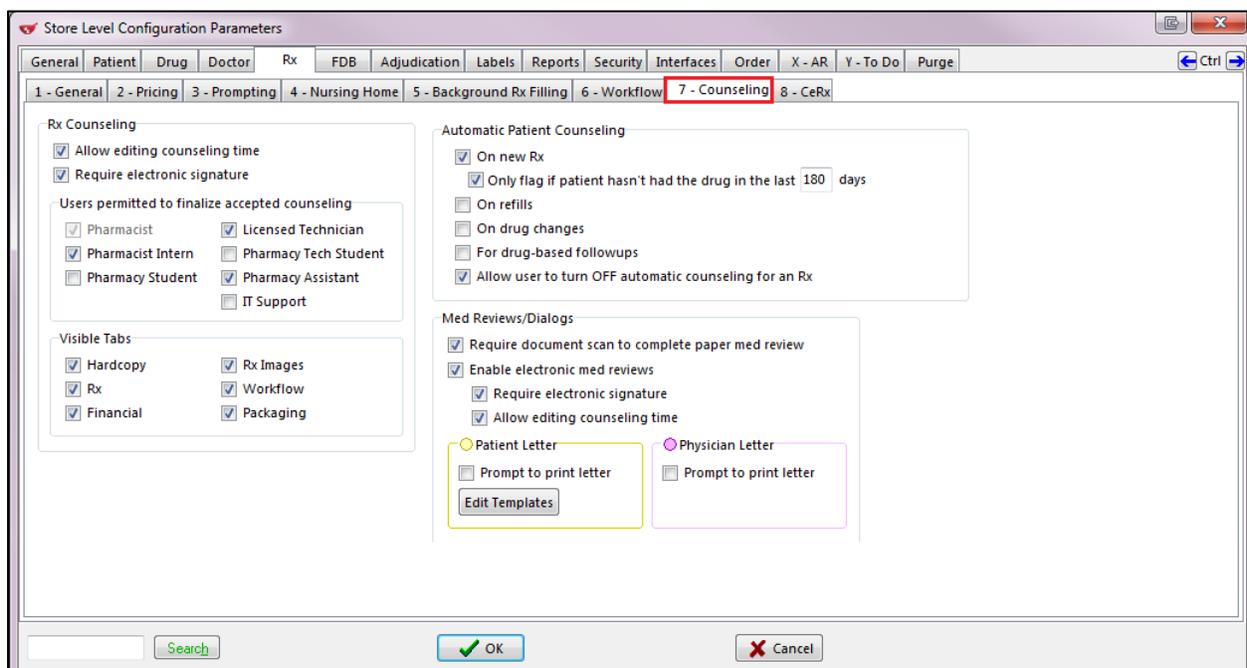
Documenting Rx Counseling

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

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

Configuration

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



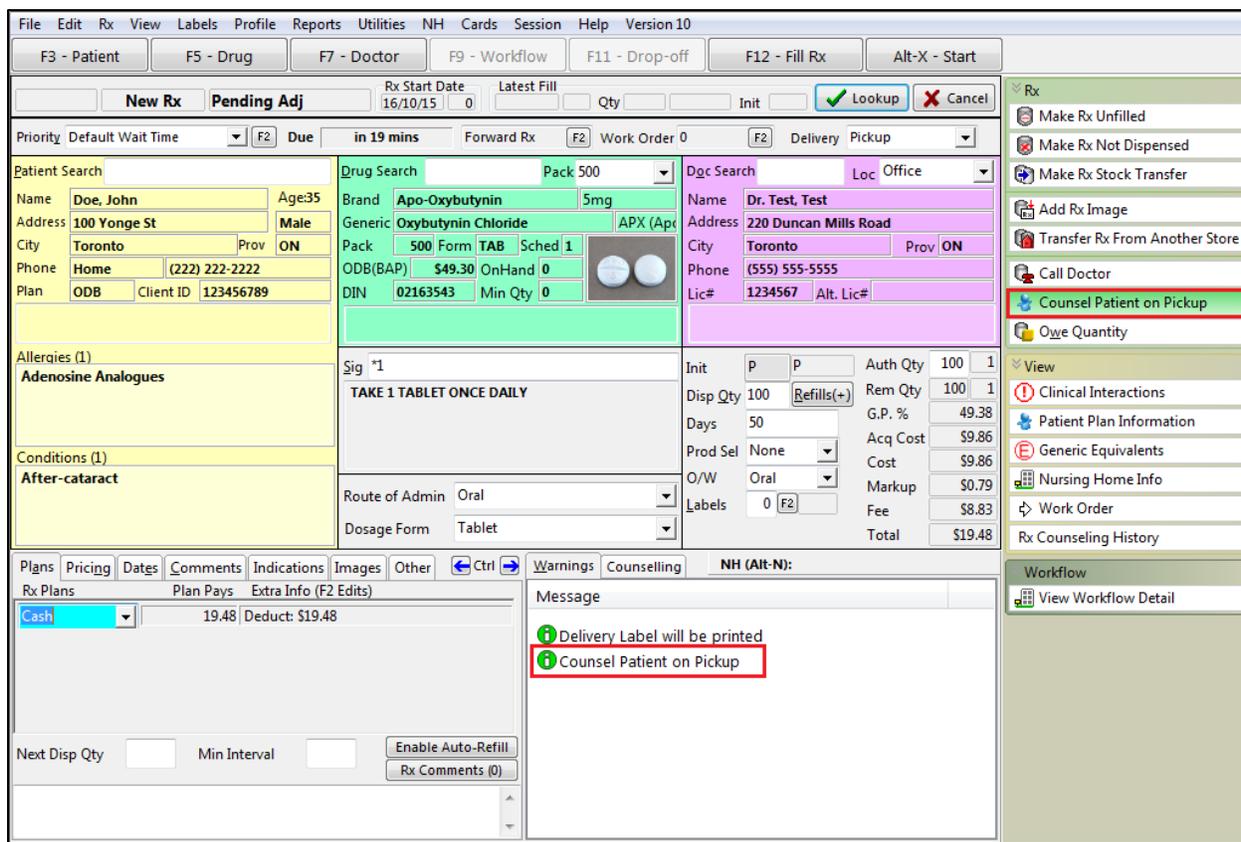
- **Rx Counseling:** allows you to control whether or not counseling times can be edited and to set up electronic signatures;
 - **Allow editing counseling time:** allows you to record the amount of time it took to complete the counseling session;
 - **Require Electronic Signature:** for this option to be available, **Allow Electronic Signatures** must be enabled in **File > Configuration > Kroll > Configuration**.
- **Users Permitted to Finalize Accepted Counseling:** allows you to control which pharmacy users are able to finalize a counseling record;
- **Visible Tabs:** allows you to control what tabs are visible on the Counseling screen;
- **Automatic Patient Counseling:** allows you to control whether new Rxs, refills, and drug changes should automatically have a counseling record created.
- **Med Reviews/Dialogs:** allows you to configure Medication Reviews for both paper based and electronic records.
 - **Require Document Scan to Complete Paper Med Review:** this option allows you to complete paper-based Medication Review using the document scan functionality;
 - **Enable Electronic Med Reviews:** enabling this option allows you to use the electronic version of Medication Review;
 - **Require Electronic Signature:** enabling this option prompts for electronic signatures where necessary (only if you are using Electronic Signature pads).
 - **Allow Editing Counseling Time:** this option allows you to modify the system-calculated amount of time it took to complete the counseling session.
- **Prompt to print letter:** allows you to enable prompting for patient letters and/or physician letters.

Automatic and Manual Counseling

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

Automatic Rx Counseling

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



The screenshot displays the F12 'Fill Rx' screen in the Kroll software. The interface is divided into several sections:

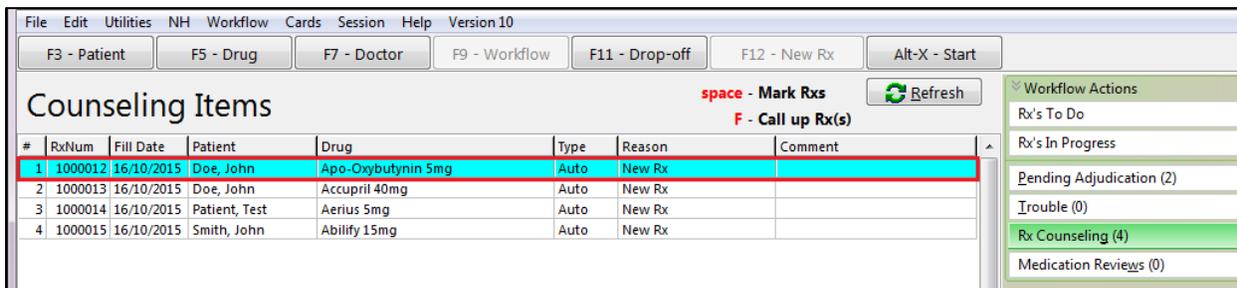
- Top Navigation:** Includes menu items (File, Edit, Rx, View, Labels, Profile, Reports, Utilities, NH, Cards, Session, Help) and function keys (F3 - Patient, F5 - Drug, F7 - Doctor, F9 - Workflow, F11 - Drop-off, F12 - Fill Rx, Alt-X - Start).
- Form Fields:**
 - Patient Search:** Name: Doe, John; Age: 35; Address: 100 Yonge St; City: Toronto; Prov: ON.
 - Drug Search:** Brand: Apo-Oxybutynin 5mg; Generic: Oxybutynin Chloride; Pack: 500 Form TAB; ODB(BAP): \$49.30; DIN: 02163543.
 - Dgc Search:** Name: Dr. Test, Test; Address: 220 Duncan Mills Road; City: Toronto; Phone: (555) 555-5555; Lic#: 1234567.
- Right Navigation Pane:** A list of actions including 'Counsel Patient on Pickup', which is highlighted with a red box.
- Message Box:** Located at the bottom, it contains two messages: 'Delivery Label will be printed' and 'Counsel Patient on Pickup', with the latter highlighted by a red box.

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



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

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

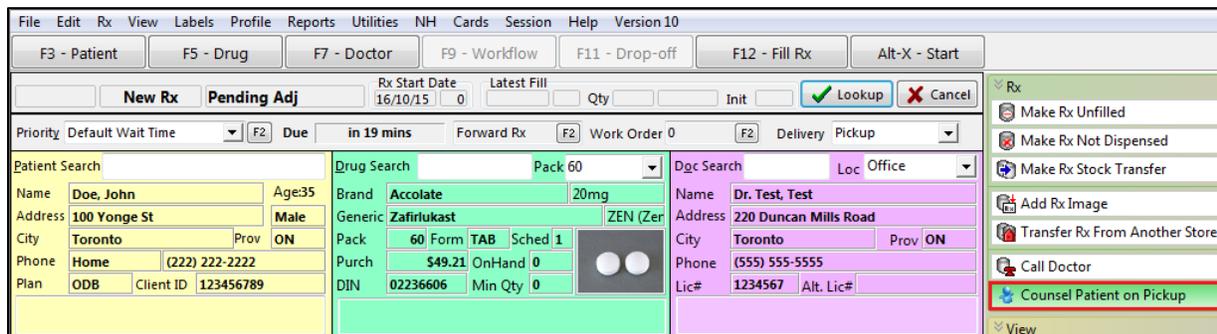


| # | RxNum | Fill Date | Patient | Drug | Type | Reason | Comment |
|---|---------|------------|---------------|--------------------|------|--------|---------|
| 1 | 1000012 | 16/10/2015 | Doe, John | Apo-Oxybutynin 5mg | Auto | New Rx | |
| 2 | 1000013 | 16/10/2015 | Doe, John | Accupril 40mg | Auto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

Manual Rx Counseling

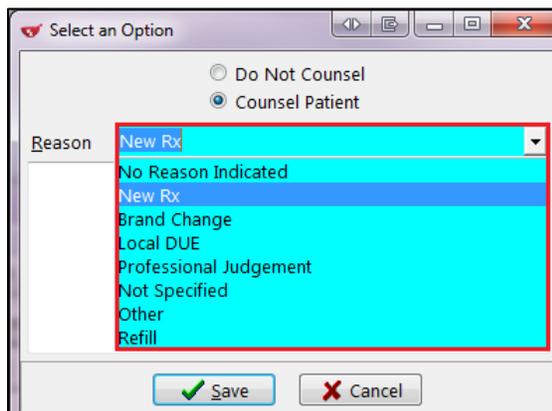
When Rxs are not configured for automatic counseling, the **Counsel Patient on Pickup** found on the right navigation pane of F12 screen will be disabled.

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



The screenshot shows the F12 - Fill Rx screen. The interface includes a menu bar at the top with options like File, Edit, Rx, View, Labels, Profile, Reports, Utilities, NH, Cards, Session, and Help. Below the menu bar are several tabs: F3 - Patient, F5 - Drug, F7 - Doctor, F9 - Workflow, F11 - Drop-off, F12 - Fill Rx, and Alt-X - Start. The main area is divided into several sections: Patient Search (Name: Doe, John; Age: 35; Address: 100 Yonge St; City: Toronto; Phone: (222) 222-2222; Plan: ODB; Client ID: 123456789), Drug Search (Brand: Accolate; 20mg; Generic: Zafirlukast; Pack: 60; Form: TAB; Sched: 1; Purch: \$49.21; OnHand: 0; DIN: 02236606; Min Qty: 0), and Dgc Search (Name: Dr. Test, Test; Address: 220 Duncan Mills Road; City: Toronto; Phone: (555) 555-5555; Lic#: 1234567; Alt. Lic#:). On the right side, there is a navigation pane with several options: Make Rx Unfilled, Make Rx Not Dispensed, Make Rx Stock Transfer, Add Rx Image, Transfer Rx From Another Store, Call Doctor, and Counsel Patient on Pickup. The 'Counsel Patient on Pickup' option is highlighted with a red box.

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



The screenshot shows a dialog box titled 'Select an Option'. It has two radio buttons: 'Do Not Counsel' (unselected) and 'Counsel Patient' (selected). Below the radio buttons is a 'Reason' dropdown menu. The dropdown menu is open, showing a list of options: 'New Rx', 'No Reason Indicated', 'New Rx', 'Brand Change', 'Local DUE', 'Professional Judgement', 'Not Specified', 'Other', and 'Refill'. The 'New Rx' option is highlighted in blue. At the bottom of the dialog box, there are two buttons: 'Save' (with a green checkmark icon) and 'Cancel' (with a red X icon). The 'Save' button is highlighted with a red box.

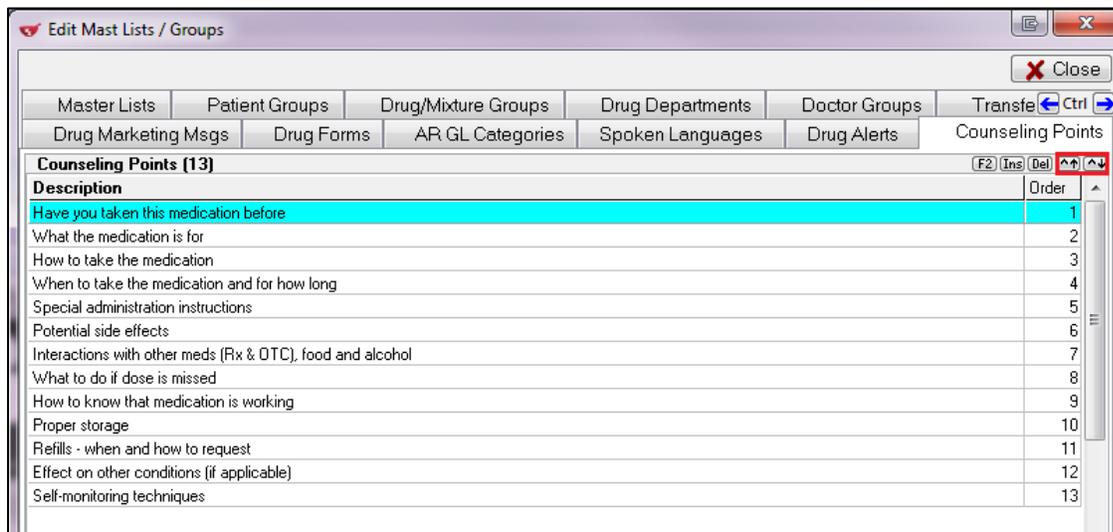
A counseling record will add to the **Counseling Items** list.

Documenting Rx Counseling

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

Editing Counseling Points

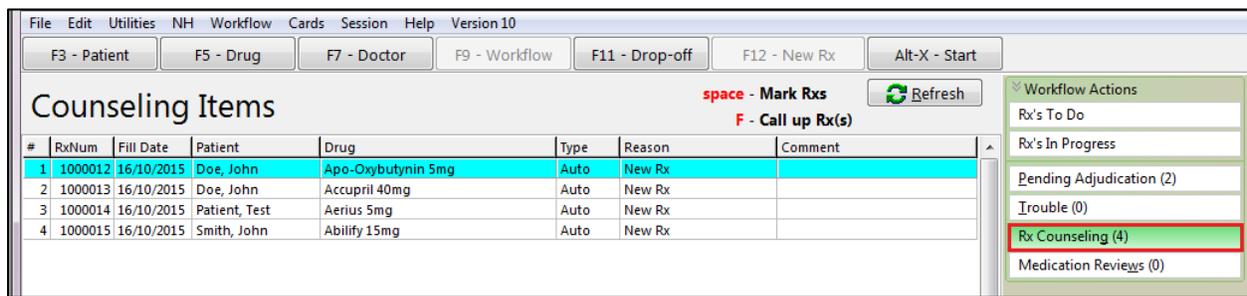
1. From the **Alt-X - Start** screen, go to **Edit > Lists**.
2. Click the **Counseling Points** tab.
3. Click **F2** to edit a counseling point, **Ins** to add a new counseling point, and **Del** to delete a counseling point, or press **F2**, **Insert**, and **Delete** on your keyboard.
4. Use the **up**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



Calling up an Rx to be Counseled

Method 1: From the Workflow screen

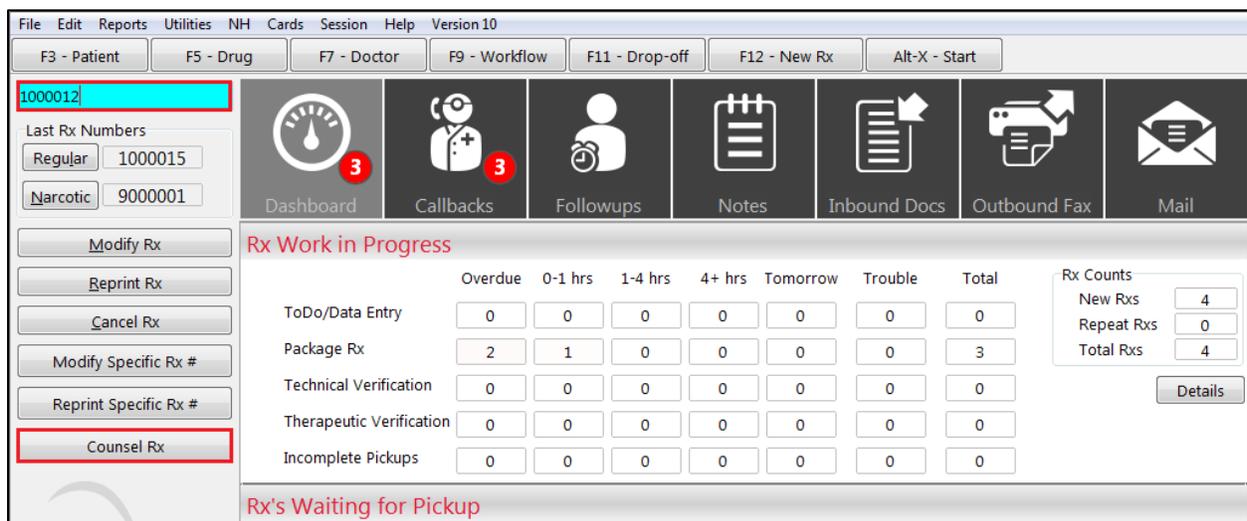
1. From the **Alt-X Start** screen, click the **Workflow** button or press **F9** on your keyboard.
2. Select **Rx Counseling** from the right navigation pane.



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

Method 2: From the Alt-X Start screen

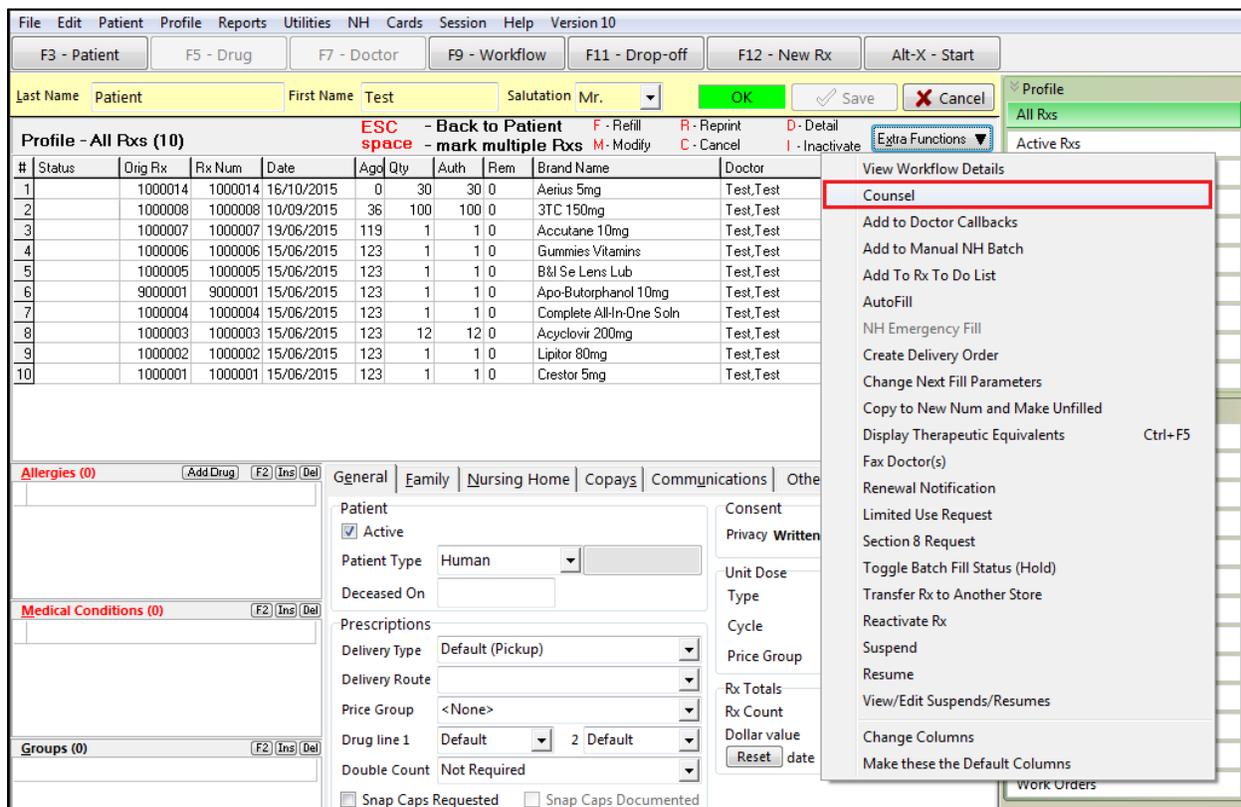
1. Enter the Rx number in the search field and click **Counsel Rx**.



The **Counseling** screen will appear.

Method 3: From the Patient Profile

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



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

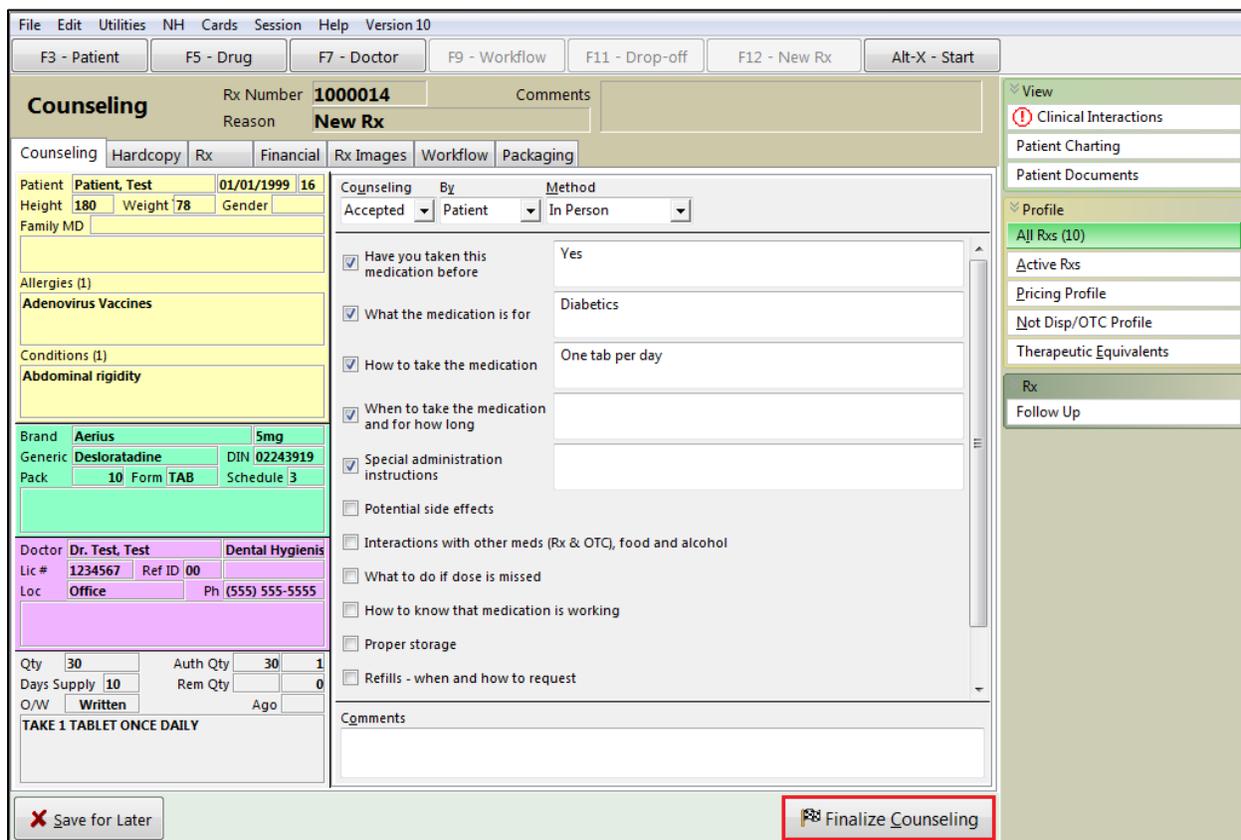
The **Counseling** screen will appear.

Counseling Accepted by Patient

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

1. Select **Yes** when asked 'Does the Patient accept counseling?'
2. Select **Patient** when asked 'Counseling is received by?'
3. Select **In Person** or **By Phone** when asked 'What is the Counseling Method?'
4. Place a checkmark next to the counseling points that were covered during the counseling session. Enter any additional information in the text box that appears next to each counseling point.

- If you want to complete documenting the counseling session at a later time, click **Save for Later**.
- When you are finished, click **Finalize Counseling**. If electronic signatures are enabled, you will be prompted for your signature.



Counseling Accepted by Agent

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

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

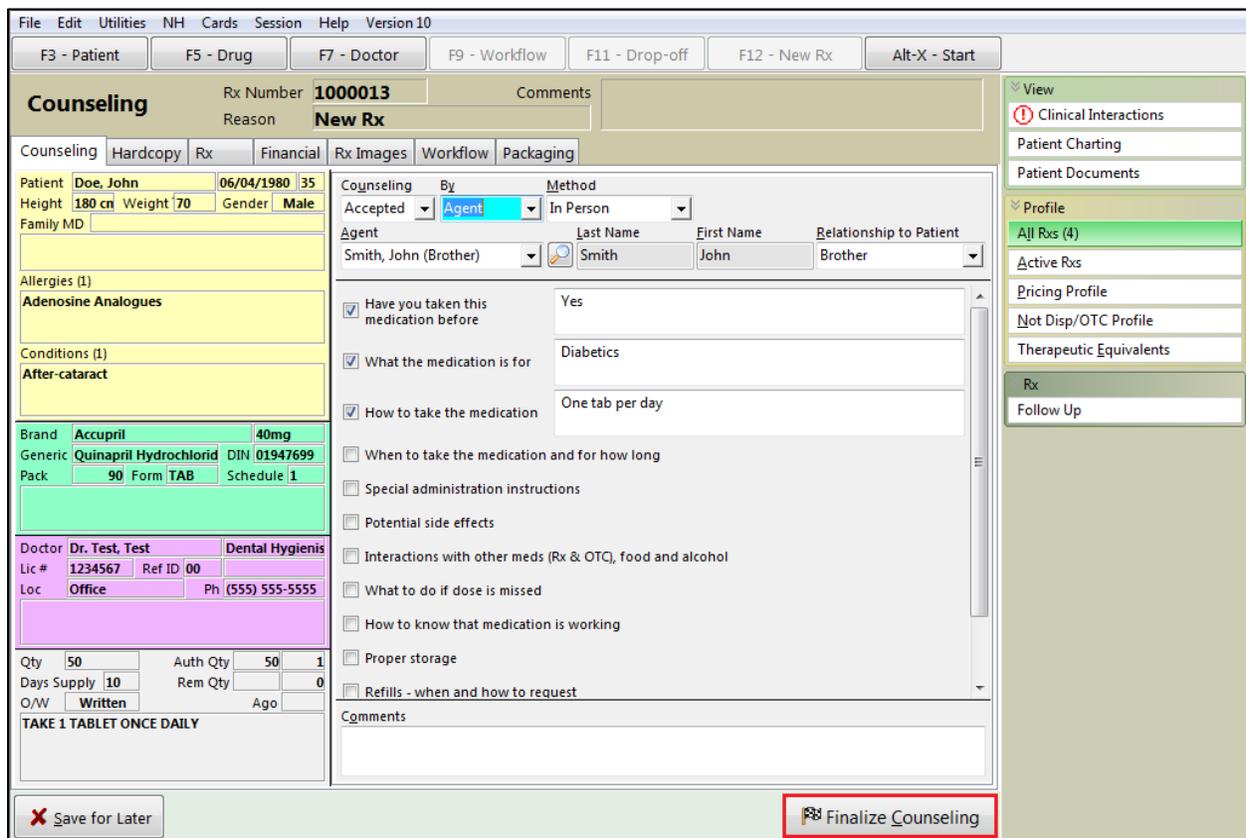
NOTE: Only persons 18 years of age and older can accept counseling on someone's behalf.

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

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

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

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



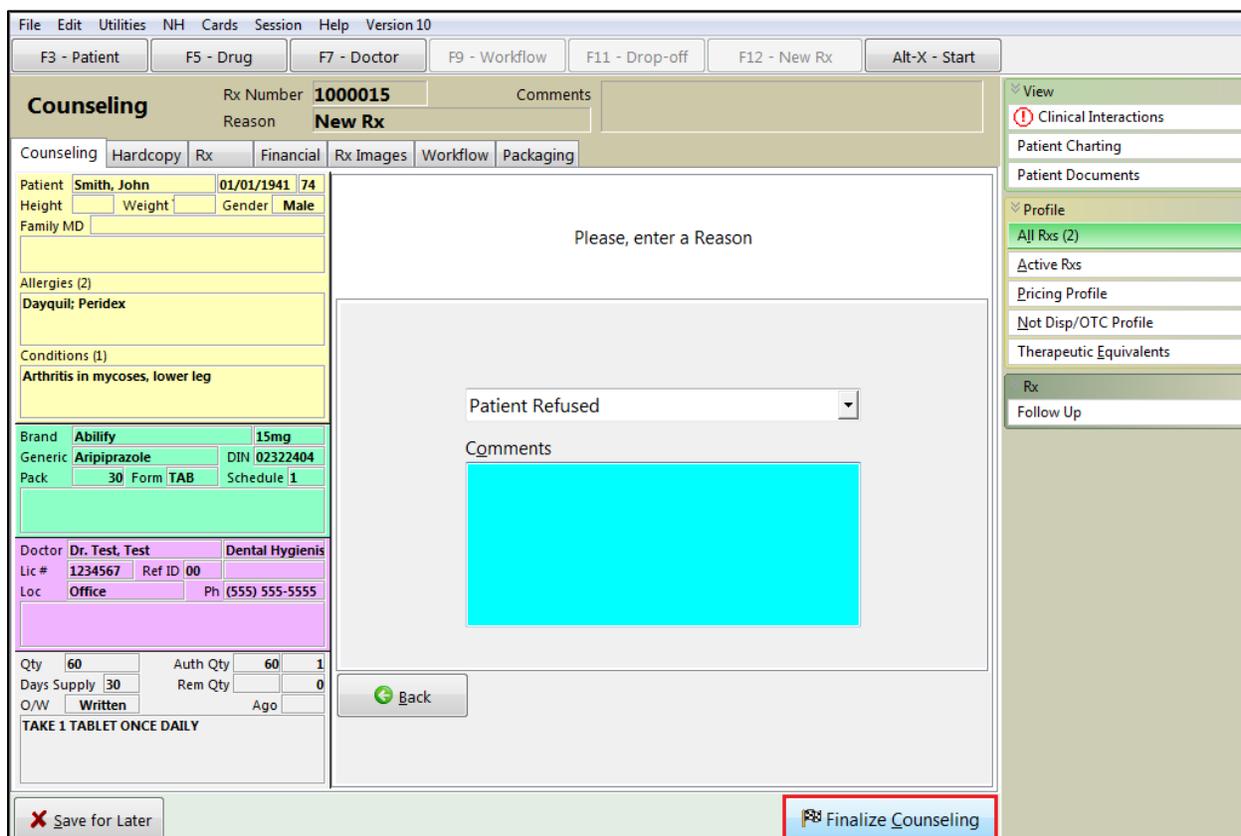
The screenshot shows the 'Counseling' window in the Kroll software. At the top, there are menu options: File, Edit, Utilities, NH, Cards, Session, Help, Version 10. Below the menu is a toolbar with buttons for 'F3 - Patient', 'F5 - Drug', 'F7 - Doctor', 'F9 - Workflow', 'F11 - Drop-off', 'F12 - New Rx', and 'Alt-X - Start'. The main area is divided into several sections:

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

Counseling Rejected by Patient/Agent

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

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

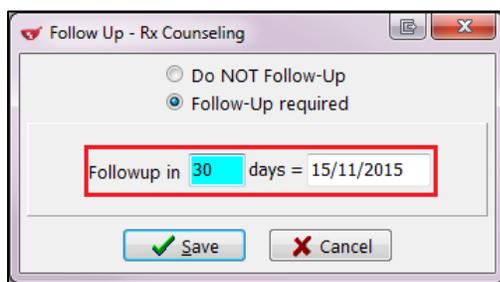


The screenshot shows the 'Counseling' screen for Rx Number 1000015. The Reason is 'New Rx'. The patient is John Smith, born 01/01/1941, Male. The drug is Aripiprazole 15mg, 30 Form TAB, Schedule 1. The doctor is Dr. Test, Test, Dental Hygienist. The 'Please, enter a Reason' dropdown is set to 'Patient Refused'. The 'Comments' field is empty. The 'Finalize Counseling' button is highlighted with a red box.

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

Counseling Follow-up

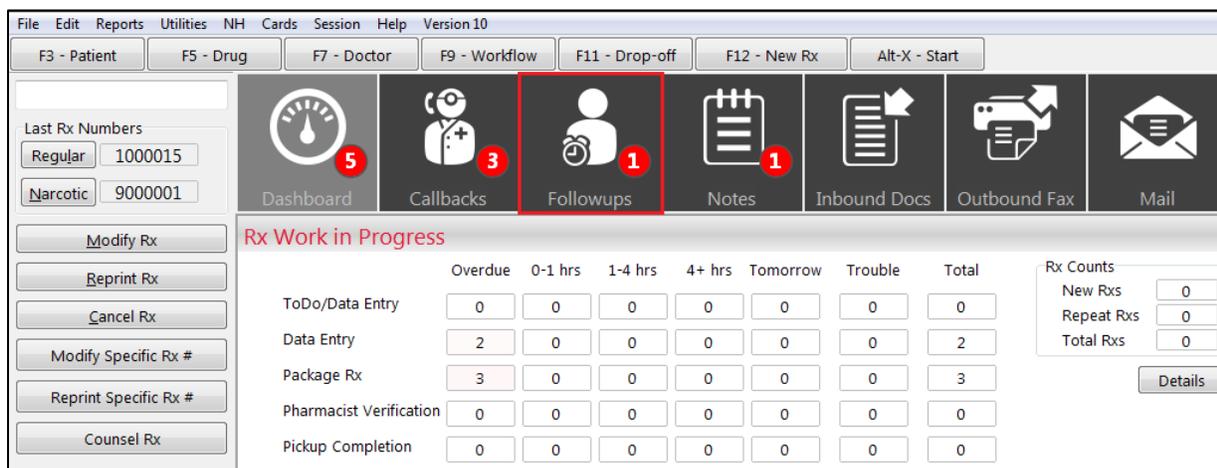
1. Prior to finalizing the counseling session, select **Follow Up** from the right navigation pane on the **Counseling** screen. The **Follow Up - Rx Counseling** window will appear.
2. Enter the number of days you want to lapse before counseling is performed again, or enter the next counseling date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



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



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



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

| Rx Counts | |
|------------|---|
| New Rxs | 0 |
| Repeat Rxs | 0 |
| Total Rxs | 0 |

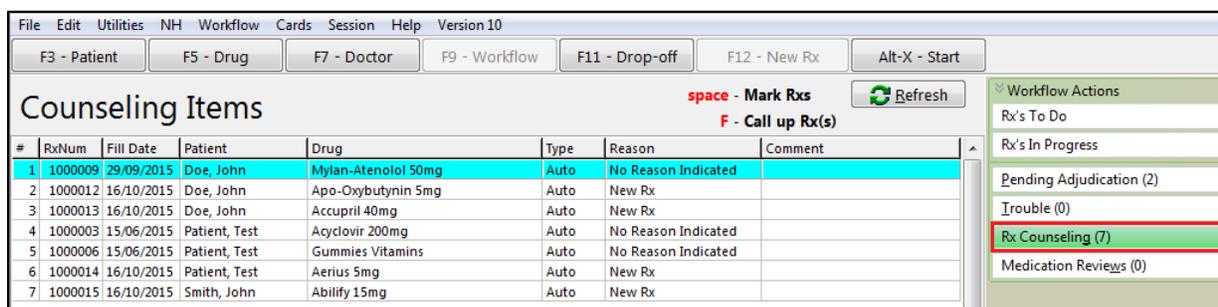
6. Double-click the Rx record.
7. Complete the **Counseling** steps noted above.
8. When you are finished, click **Finalize Counseling**.

Printing and Scanning the Prescription Counseling Worksheet

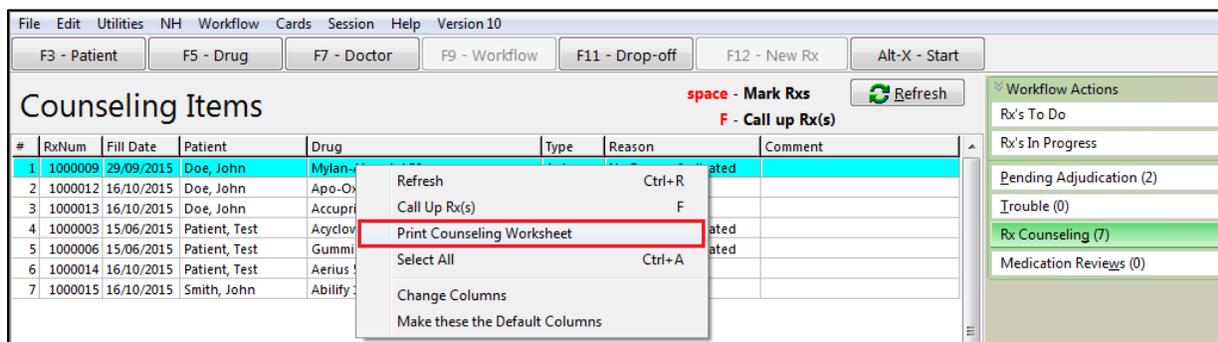
If, for some reason, documenting Rx counseling cannot be completed on-screen, users can print a Prescription Counseling Worksheet, complete it manually, and scan it into Kroll using the document scan utility.

Method 1: From the Counseling Items screen

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



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



A Prescription Counseling Worksheet like the one below will generate:

Prescription Counseling Worksheet

| | | | |
|---|----------------|--|--|
| RxNum 1000009 | CounselingDate | Method | Counseling <input type="checkbox"/> Accepted <input type="checkbox"/> Rejected |
| OrigRxNum 1000009 | AgenName | AgeRelationship | |
| Patient Doe, John 100 Yonge St Toronto ON M1K 4X5 Home: (222) 222-2222 | | Drug Mylan-Atenolol Atenolol DIN: 02146894 Form: TAB Mfr: MYL Schedule: 1 | Prescriber Test, Test 220 Duncan Mills Road Toronto ON (555) 555-5555 |

Counseling Points Reviewed

Have you taken this medication before _____

What the medication is for _____

How to take the medication _____

When to take the medication and for how long _____

Special administration instructions _____

Potential side effects _____

Interactions with other meds (Rx & OTC), food and alcohol _____

What to do if dose is missed _____

How to know that medication is working _____

Proper storage _____

Refills - when and how to request _____

Effect on other conditions (if applicable) _____

Self-monitoring techniques _____

Comments: _____

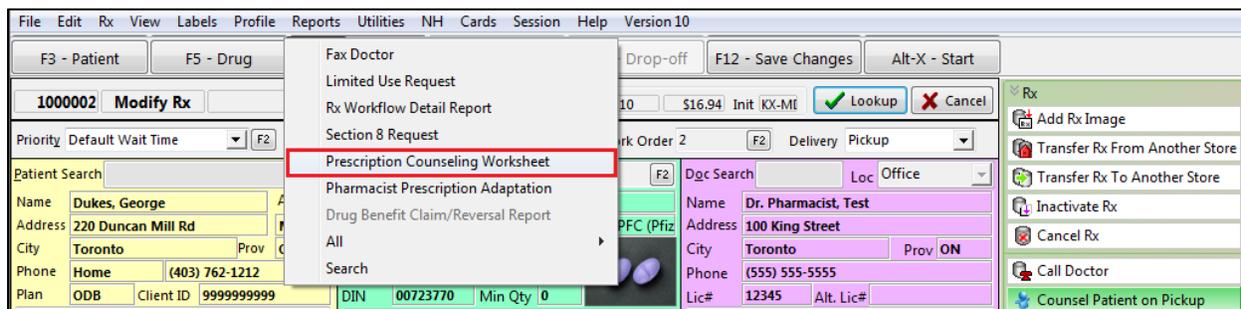
Counseled by: _____ Signature: _____ Date: _____



Printed on: 16/10/2015 12:05:40 Page 1

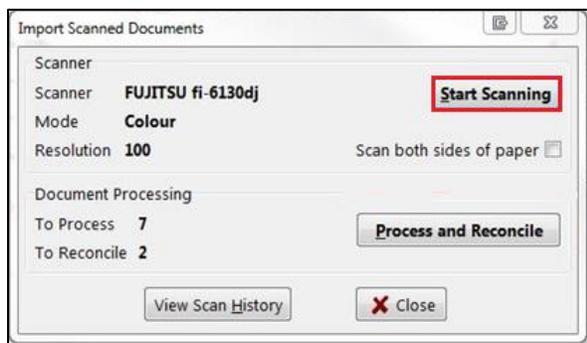
Method 2: From the F12 screen

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



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

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

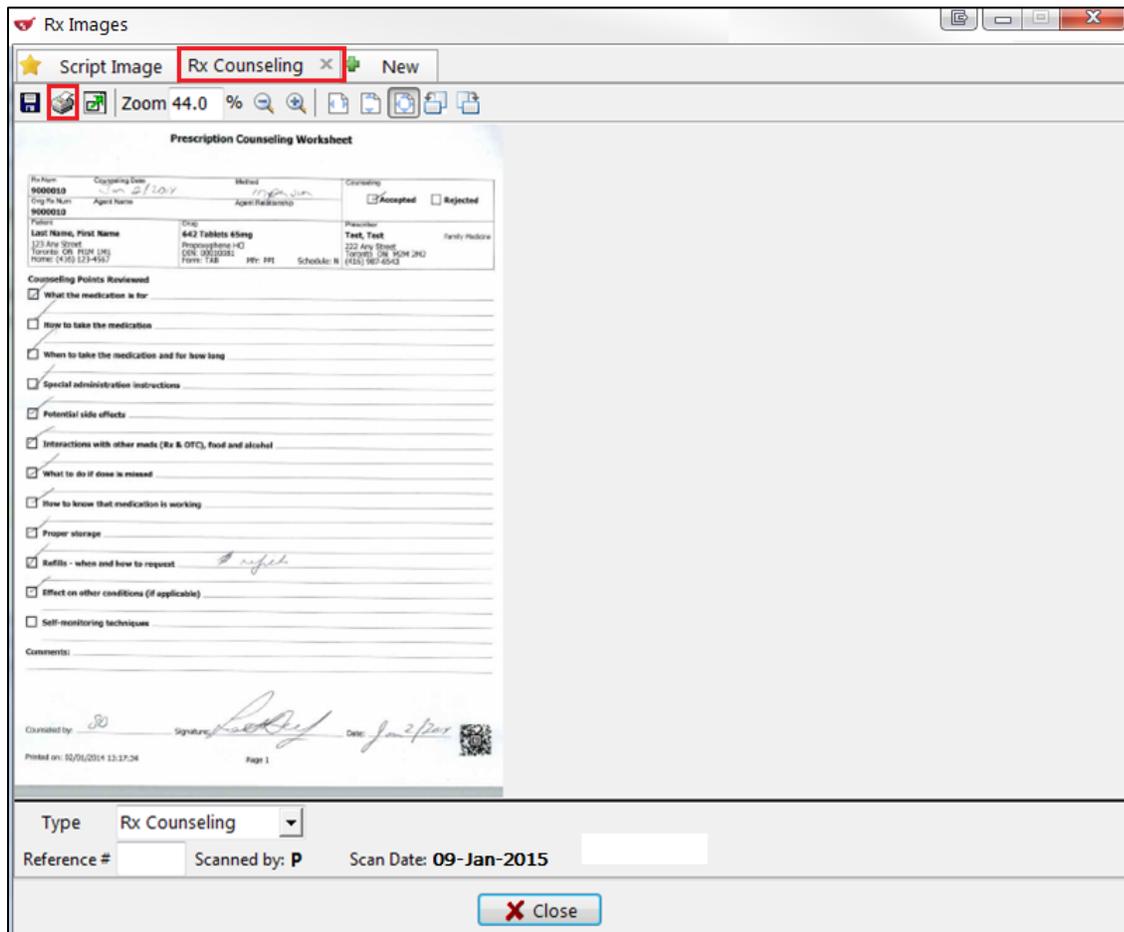


3. Complete the scan document process as per normal procedures. The counseling record will no longer appear in the **Counseling Items** screen.

Viewing Scanned Prescription Counseling Worksheets

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

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



4. If you need to reprint the worksheet, click the **Print** icon in the upper left corner of the **Rx Images** window.

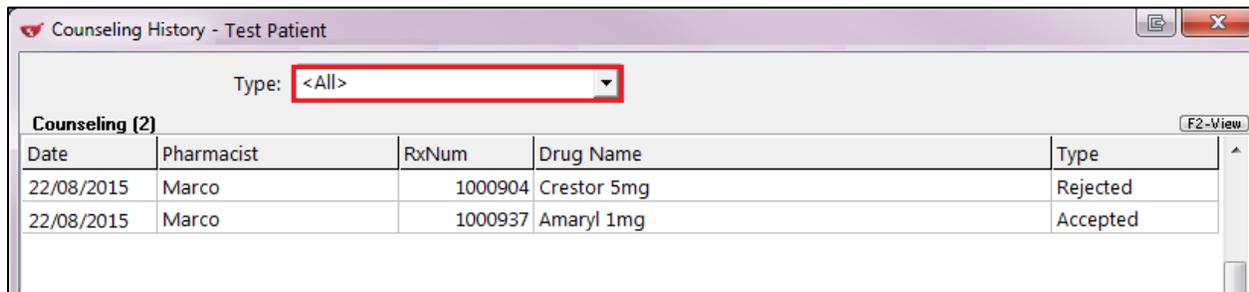
5. When you are finished, click **Close**.

Viewing Counseling History

Method 1: From the Patient Profile

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

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

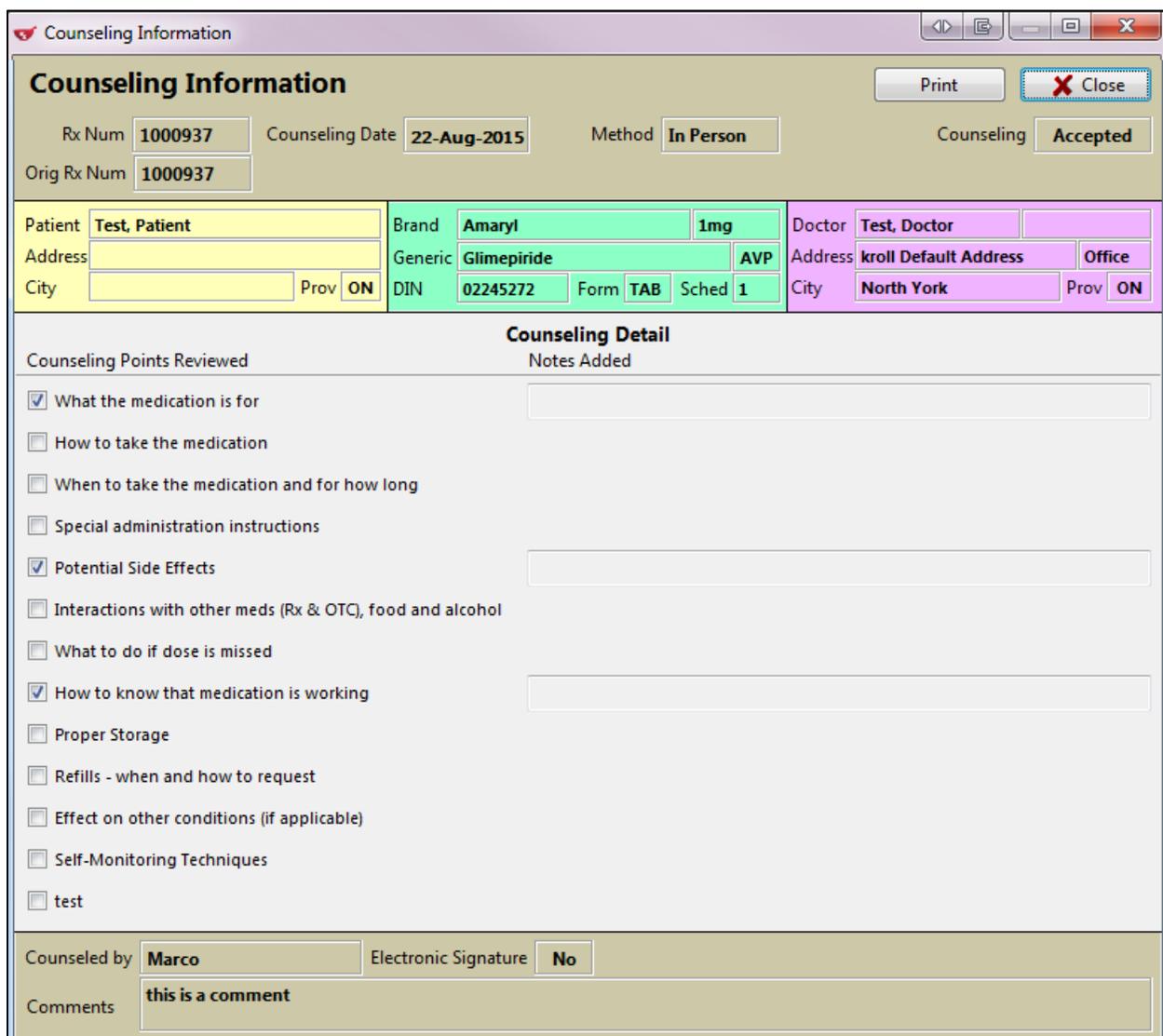


Counseling History - Test Patient

Type: <All>

| Counseling (2) | | | | |
|----------------|------------|---------|-------------|----------|
| Date | Pharmacist | RxNum | Drug Name | Type |
| 22/08/2015 | Marco | 1000904 | Crestor 5mg | Rejected |
| 22/08/2015 | Marco | 1000937 | Amaryl 1mg | Accepted |

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



Counseling Information

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

Orig Rx Num: 1000937

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

Counseling Detail

| Counseling Points Reviewed | Notes Added |
|--|-------------|
| <input checked="" type="checkbox"/> What the medication is for | |
| <input type="checkbox"/> How to take the medication | |
| <input type="checkbox"/> When to take the medication and for how long | |
| <input type="checkbox"/> Special administration instructions | |
| <input checked="" type="checkbox"/> Potential Side Effects | |
| <input type="checkbox"/> Interactions with other meds (Rx & OTC), food and alcohol | |
| <input type="checkbox"/> What to do if dose is missed | |
| <input checked="" type="checkbox"/> How to know that medication is working | |
| <input type="checkbox"/> Proper Storage | |
| <input type="checkbox"/> Refills - when and how to request | |
| <input type="checkbox"/> Effect on other conditions (if applicable) | |
| <input type="checkbox"/> Self-Monitoring Techniques | |
| <input type="checkbox"/> test | |

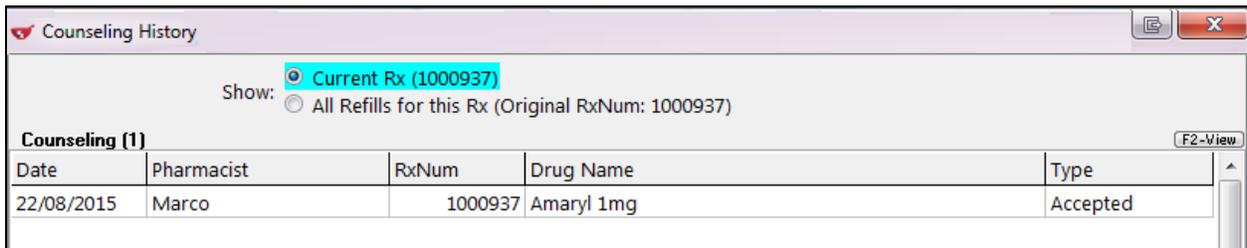
Counseled by: Marco Electronic Signature: No

Comments: this is a comment

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

Method 2: From the Rx Screen

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



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

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

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

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