

# Documenting Rx Counseling

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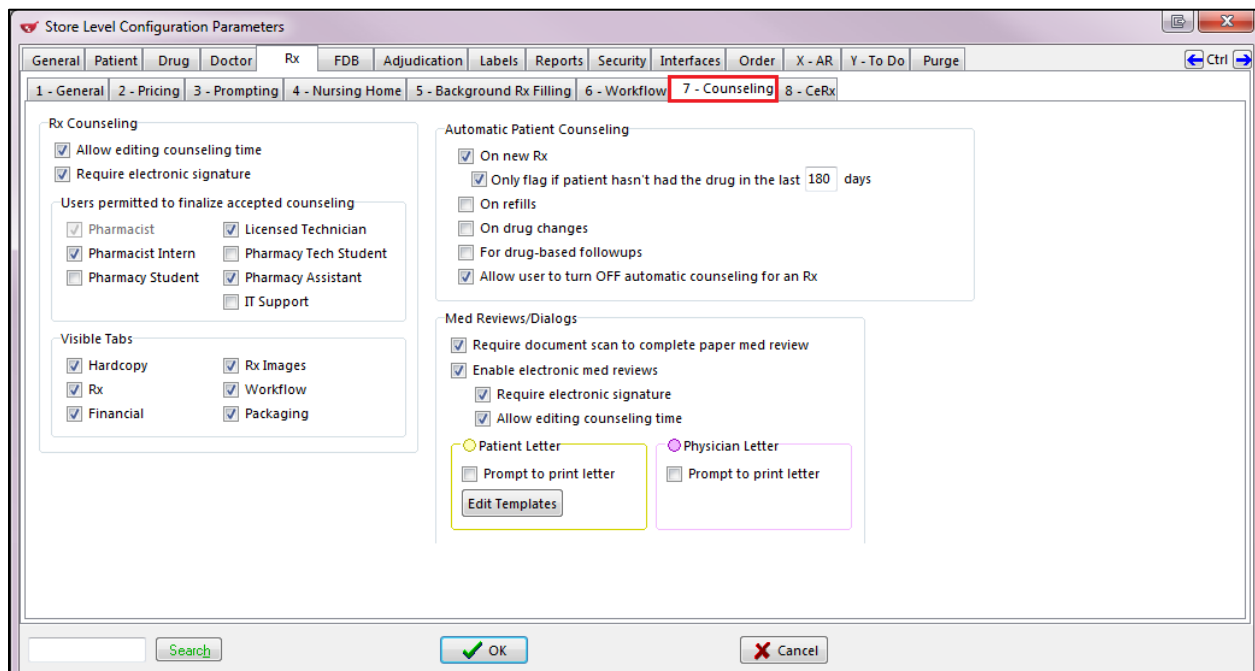
# Documenting Rx Counseling

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

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

## Configuration

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



**Store Level Configuration Parameters**

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

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

**Rx Counseling**

- ☒ Allow editing counseling time
- ☒ Require electronic signature
- Users permitted to finalize accepted counseling**
  - ☒ Pharmacist
  - ☒ Licensed Technician
  - ☒ Pharmacist Intern
  - ☐ Pharmacy Tech Student
  - ☐ Pharmacy Student
  - ☒ Pharmacy Assistant
  - ☐ IT Support
- Visible Tabs**
  - ☒ Hardcopy
  - ☒ Rx Images
  - ☒ Rx
  - ☒ Workflow
  - ☒ Financial
  - ☒ Packaging

**Automatic Patient Counseling**

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

**Med Reviews/Dialogs**

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

**Patient Letter**

- ☐ Prompt to print letter
- 

**Physician Letter**

- ☐ Prompt to print letter

Search OK Cancel

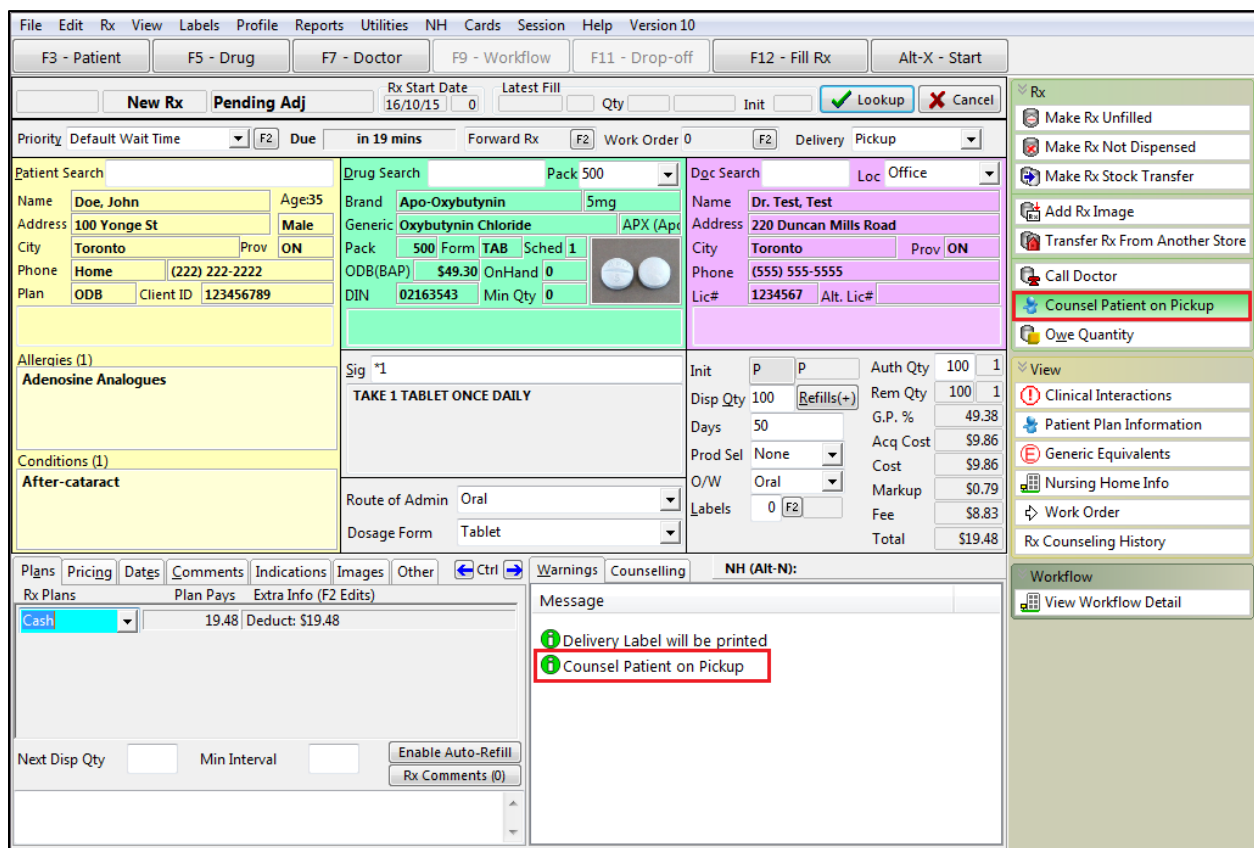
- **Rx Counseling:** allows you to control whether or not counseling times can be edited and to set up electronic signatures;
  - **Allow editing counseling time:** allows you to record the amount of time it took to complete the counseling session;
  - **Require Electronic Signature:** for this option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

# Automatic and Manual Counseling

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

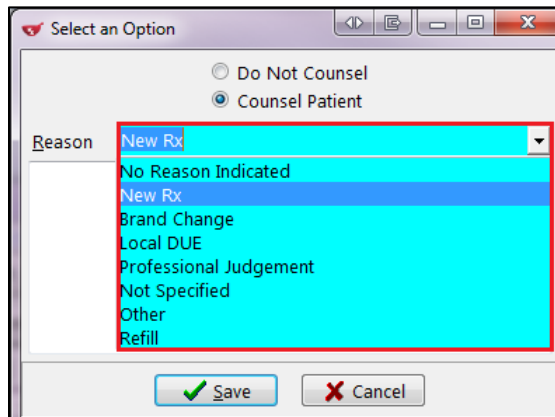
## Automatic Rx Counseling

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



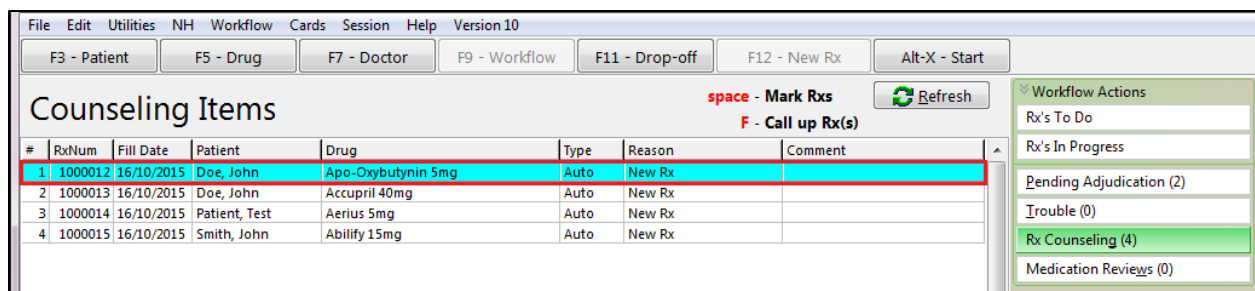
The screenshot displays the 'F12 - Fill Rx' screen in the Kroll software. The interface includes a menu bar at the top with options like File, Edit, Rx, View, Labels, Profile, Reports, Utilities, NH, Cards, Session, and Help. Below the menu is a toolbar with buttons for F3 - Patient, F5 - Drug, F7 - 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: Apo-Oxybutynin; Generic: Oxybutynin Chloride; Pack: 500 Form TAB; Sched: 1; ODB(BAP): \$49.30; OnHand: 0; DIN: 02163543; 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#: ). The right-hand navigation pane lists various actions, with 'Counsel Patient on Pickup' highlighted in red. The bottom section shows a 'Message' area with two red-bordered boxes containing the text: 'Delivery Label will be printed' and 'Counsel Patient on Pickup'.

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



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

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

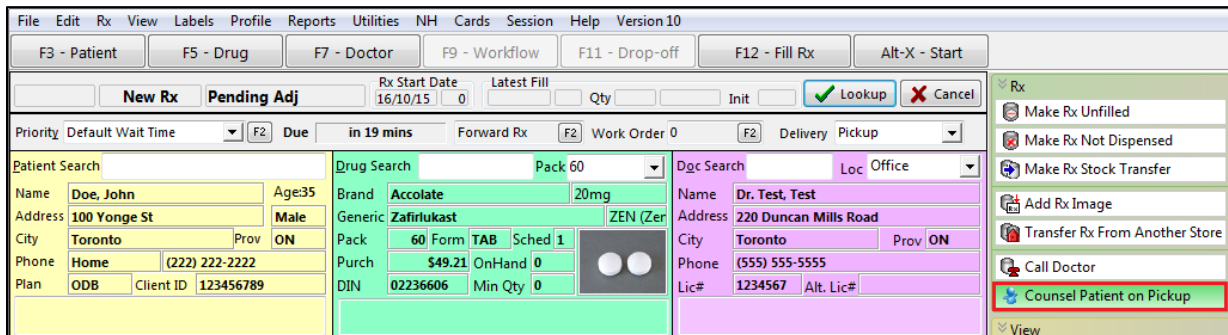


#	RxNum	Fill Date	Patient	Drug	Type	Reason	Comment
1	1000012	16/10/2015	Doe, John	Apo-Oxybutynin 5mg	Auto	New Rx	
2	1000013	16/10/2015	Doe, John	Accupril 40mg	Auto	New Rx	
3	1000014	16/10/2015	Patient, Test	Aerius 5mg	Auto	New Rx	
4	1000015	16/10/2015	Smith, John	Abilify 15mg	Auto	New Rx	

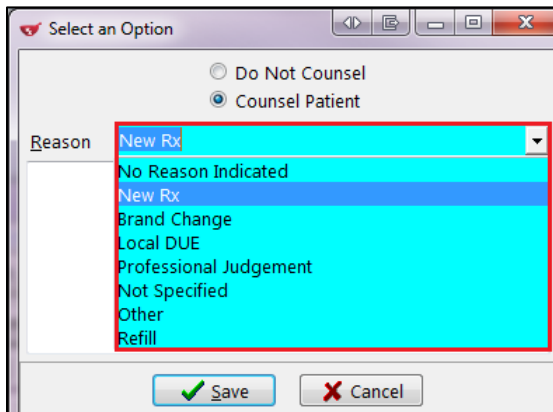
## Manual Rx Counseling

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

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



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



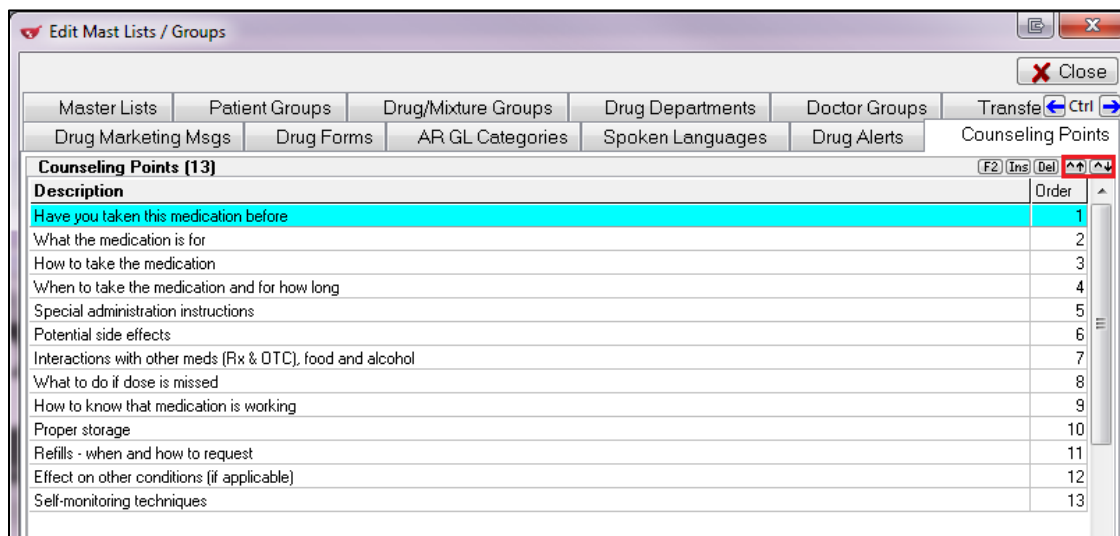
A counseling record will add to the **Counseling Items** list.

# Documenting Rx Counseling

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

## Editing Counseling Points

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



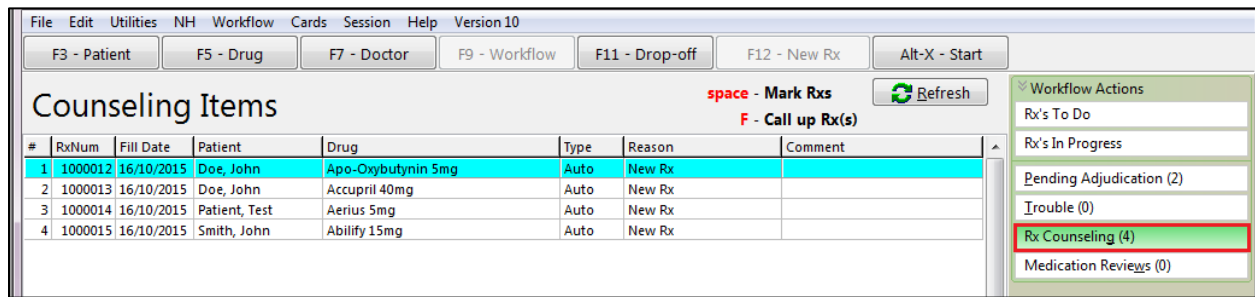
Description	Order
Have you taken this medication before	1
What the medication is for	2
How to take the medication	3
When to take the medication and for how long	4
Special administration instructions	5
Potential side effects	6
Interactions with other meds (Rx & OTC), food and alcohol	7
What to do if dose is missed	8
How to know that medication is working	9
Proper storage	10
Refills - when and how to request	11
Effect on other conditions (if applicable)	12
Self-monitoring techniques	13



## Calling up an Rx to be Counseled

### Method 1: From the Workflow screen

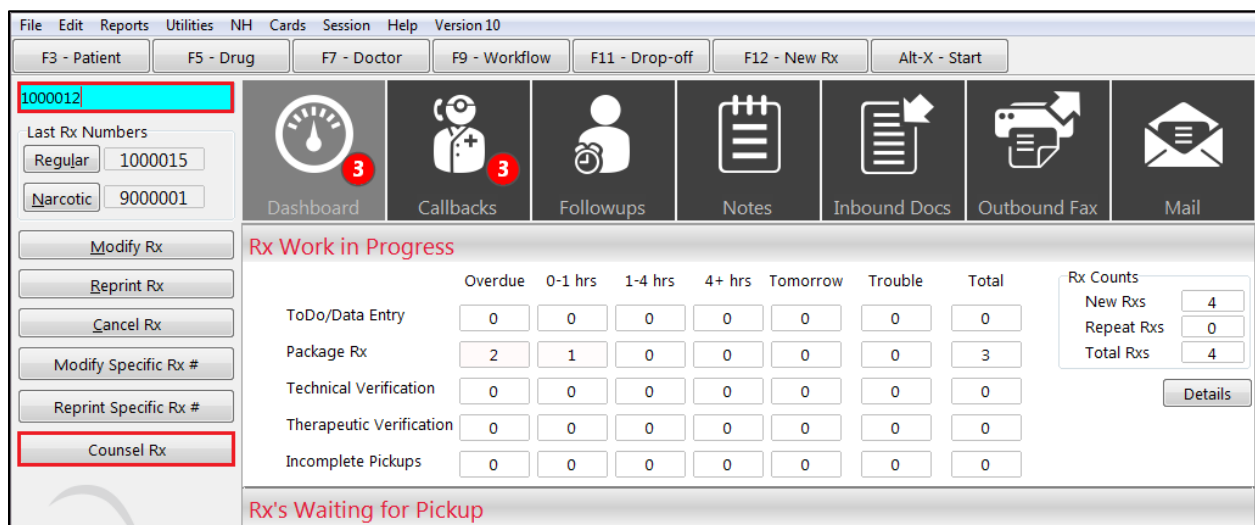
1. From the **Alt-X Start** screen, click the **Workflow** button or press **F9** on your keyboard.
2. Select **Rx Counseling** from the right navigation pane.



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

### Method 2: From the Alt-X Start screen

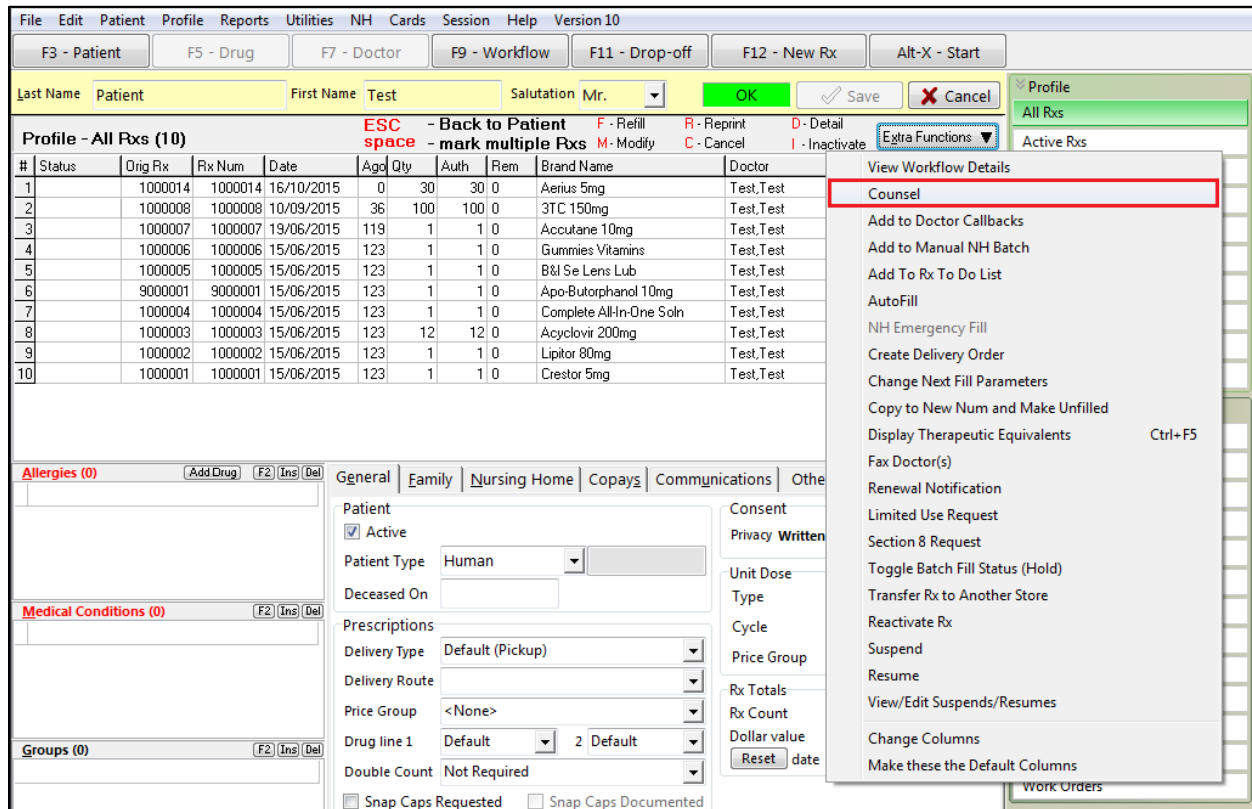
1. Enter the Rx number in the search field and click **Counsel Rx**.



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**.



The screenshot shows the KROLL software interface. At the top, there's a menu bar with options like File, Edit, Patient, Profile, Reports, Utilities, NH, Cards, Session, Help, and Version 10. Below the menu bar, there are 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. On the left, there's a 'Profile - All Rxs (10)' section with a table of prescriptions. The table has columns for #, Status, Orig Rx, Rx Num, Date, Age, Qty, Auth, Rem, Brand Name, and Doctor. The table contains 10 rows of data. On the right, there's a 'Profile' section with a navigation pane showing 'All Rxs' and 'Active Rxs'. The 'Extra Functions' menu is open, and the 'Counsel' option is highlighted. Below the 'Counsel' option, there are several other options like 'Add to Doctor Callbacks', 'Add to Manual NH Batch', 'Add To Rx To Do List', 'AutoFill', 'NH Emergency Fill', 'Create Delivery Order', 'Change Next Fill Parameters', 'Copy to New Num and Make Unfilled', 'Display Therapeutic Equivalents', 'Fax Doctor(s)', 'Renewal Notification', 'Limited Use Request', 'Section 8 Request', 'Toggle Batch Fill Status (Hold)', 'Transfer Rx to Another Store', 'Reactivate Rx', 'Suspend', 'Resume', 'View/Edit Suspends/Resumes', 'Change Columns', and 'Make these the Default Columns'. At the bottom, there's a 'Work Orders' section.

#	Status	Orig Rx	Rx Num	Date	Age	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

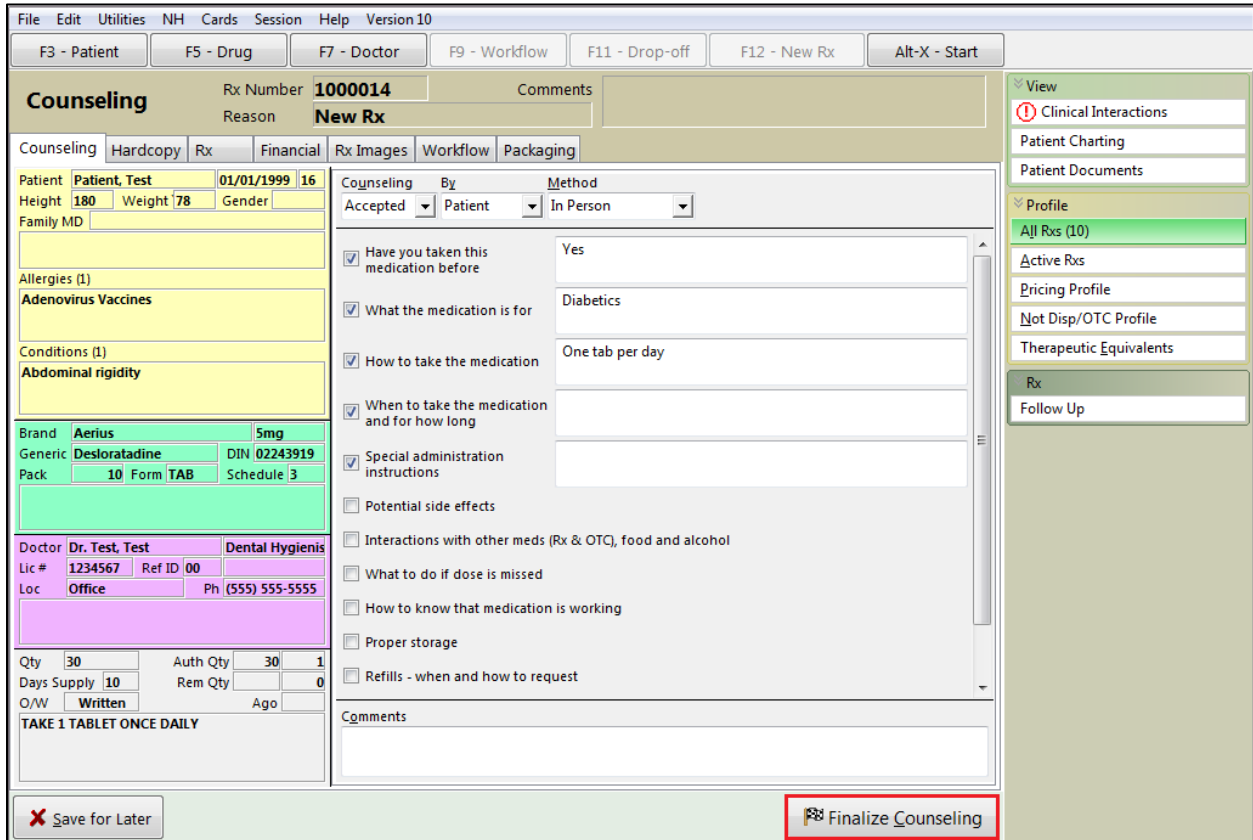
The **Counseling** screen will appear.

## 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.



The screenshot shows the 'Counseling' screen in the Kroll software. The top menu bar includes File, Edit, Utilities, NH, Cards, Session, and Help. 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 window is divided into several sections:

- Header:** Rx Number 1000014, Reason New Rx, Comments.
- Navigation:** Counseling, Hardcopy, Rx, Financial, Rx Images, Workflow, Packaging.
- Patient Information:** Patient Patient, Test, 01/01/1999, 16, Height 180, Weight 78, Gender, Family MD, Allergies (1) Adenovirus Vaccines, Conditions (1) Abdominal rigidity.
- Medication Information:** Brand Aeriur, 5mg, Generic Desloratadine, DIN 02243919, Pack 10 Form TAB, Schedule 3.
- Doctor Information:** Doctor Dr. Test, Test, Dental Hygienist, Lic # 1234567, Ref ID 00, Loc Office, Ph (555) 555-5555.
- Counseling Options:** Counseling By Patient, Method In Person. Checkboxes for: 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:** A text area for additional notes.
- Buttons:** Save for Later (with a red X icon) and Finalize Counseling (highlighted with a red box).
- Right Sidebar:** View (Clinical Interactions, Patient Charting, Patient Documents), Profile (All Rxs (10), Active Rxs, Pricing Profile, Not Disp/OTC Profile, Therapeutic Equivalents), Rx (Follow Up).

## Counseling Accepted by Agent

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

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

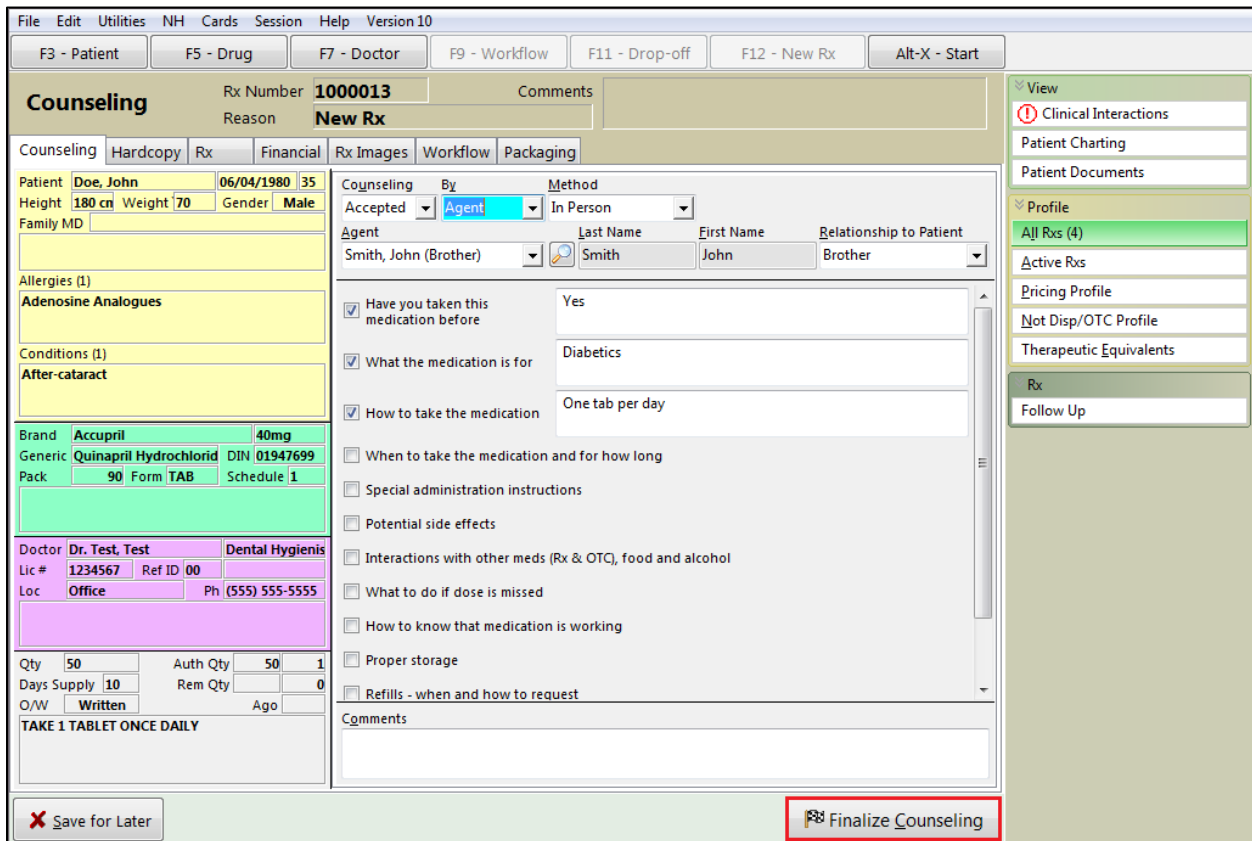
**NOTE:** Only persons 18 years of age and older can accept counseling on someone's behalf.

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

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

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

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



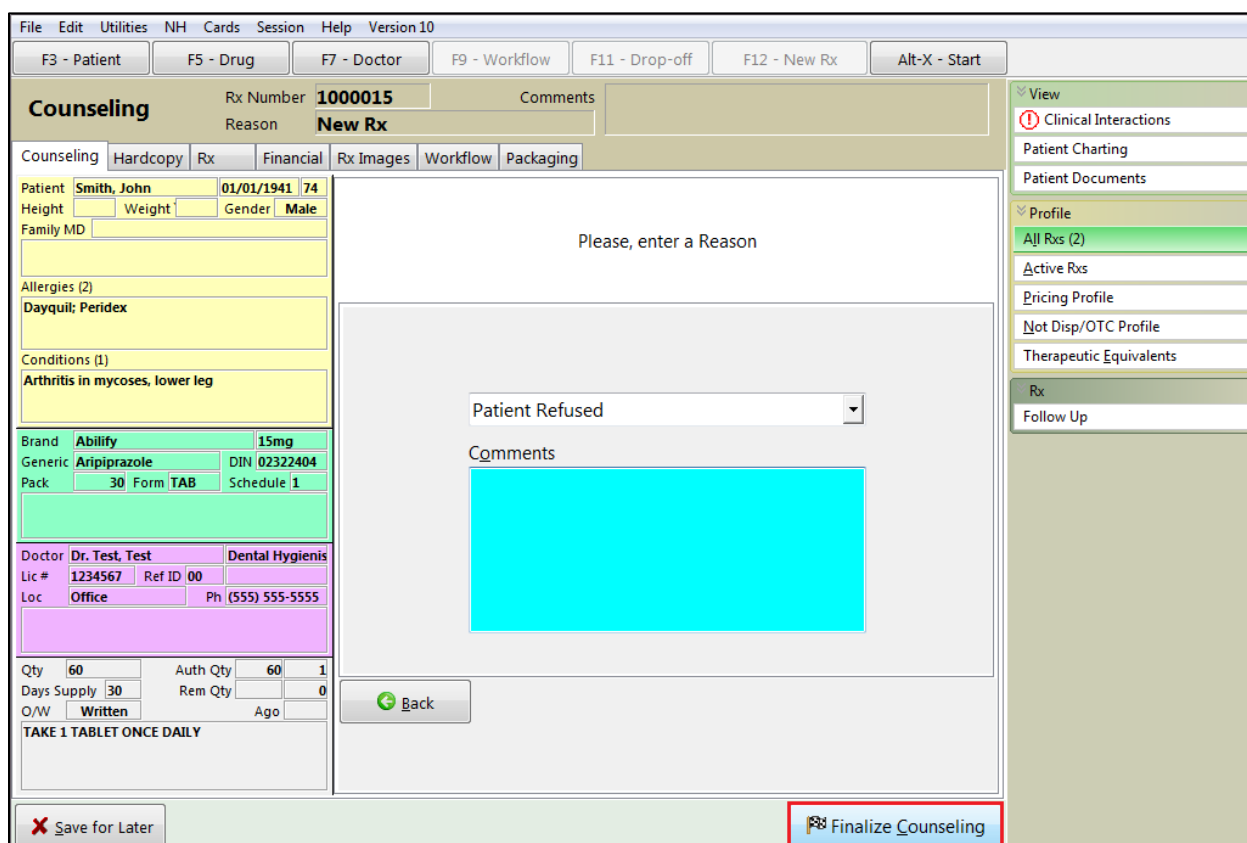
The screenshot displays the 'Counseling' window in the Kroll software. The interface includes a menu bar (File, Edit, Utilities, NH, Cards, Session, Help, Version 10) and a toolbar with buttons for F3 - Patient, F5 - Drug, F7 - Doctor, F9 - Workflow, F11 - Drop-off, F12 - New Rx, and Alt-X - Start. The main window is divided into several sections:

- Top Section:** Contains 'Rx Number' (1000013), 'Comments', and 'Reason' (New Rx).
- Left Panel:** Includes tabs for Counseling, Hardcopy, Rx, Financial, Rx Images, Workflow, and Packaging. Below these are fields for Patient (Doe, John), Height (180 cm), Weight (70), Gender (Male), Family MD, Allergies (Adenosine Analogues), Conditions (After-cataract), Brand (Accupril 40mg), Generic (Quinapril Hydrochlorid), Pack (90 Form TAB), Schedule (1), Doctor (Dr. Test, Test), Dental Hygienist, Lic # (1234567), Ref ID (00), Loc (Office), and Ph ((555) 555-5555). It also shows Qty (50), Auth Qty (50), Days Supply (10), Rem Qty (0), O/W (Written), and a note 'TAKE 1 TABLET ONCE DAILY'.
- Right Panel:** Contains a 'View' section with 'Clinical Interactions', 'Patient Charting', and 'Patient Documents'. Below this is a 'Profile' section with 'All Rxs (4)', 'Active Rxs', 'Pricing Profile', 'Not Disp/OTC Profile', and 'Therapeutic Equivalents'. At the bottom is an 'Rx' section with 'Follow Up'.
- Bottom Section:** Includes a 'Counseling' section with 'By' (Agent), 'Method' (In Person), 'Agent' (Smith, John (Brother)), 'Last Name' (Smith), 'First Name' (John), and 'Relationship to Patient' (Brother). It also has checkboxes for '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', and 'Refills - when and how to request'. A 'Comments' text box is at the bottom.
- Bottom Bar:** Contains a 'Save for Later' button and a 'Finalize Counseling' button (highlighted with a red box).

## 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**.

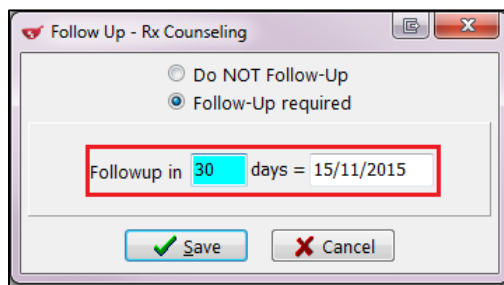


The screenshot shows the 'Counseling' screen for a patient named John Smith. The 'Reason' dropdown is set to 'Patient Refused'. The 'Comments' field is highlighted in blue. The 'Finalize Counseling' button is highlighted with a red box.

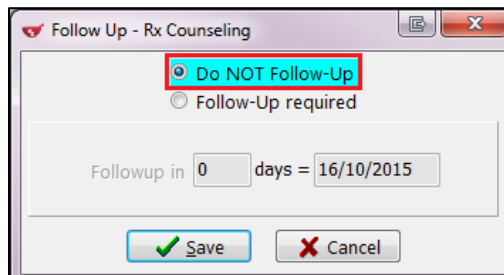
If the patient requests Rx counseling at a later date a new counseling record for the Rx can be created either from the **Alt-X Start** screen or from the patient profile, as noted in [Method 3: From the Patient Profile](#).

## Counseling Follow-up

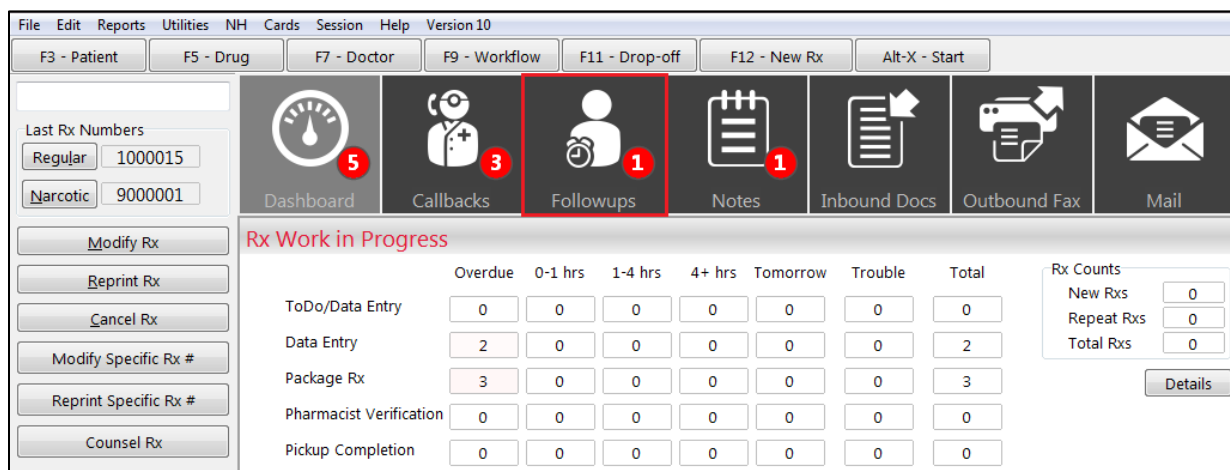
1. Prior to finalizing the counseling session, select **Follow Up** from the right navigation pane on the **Counseling** screen. The **Follow Up - Rx Counseling** window will appear.
2. Enter the number of days you want to lapse before counseling is performed again, or enter the next counseling date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

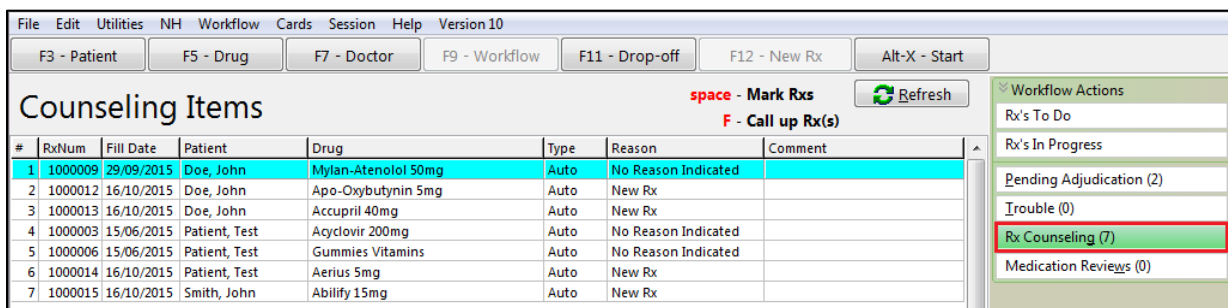
6. Double-click the Rx record.
7. Complete the **Counseling** steps noted above.
8. When you are finished, click **Finalize Counseling**.

## 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.

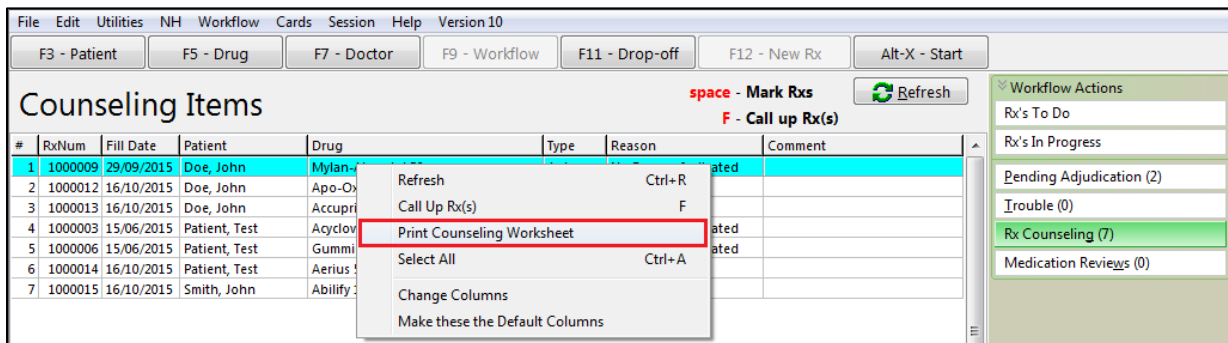
### Method 1: From the Counseling Items screen

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.




#	RxNum	Fill Date	Patient	Drug	Type	Reason	Comment
1	1000009	29/09/2015	Doe, John	Mylan-Atenolol 50mg	Auto	No Reason Indicated	
2	1000012	16/10/2015	Doe, John	Apo-Oxybutynin 5mg	Auto	New Rx	
3	1000013	16/10/2015	Doe, John	Accupril 40mg	Auto	New Rx	
4	1000003	15/06/2015	Patient, Test	Acyclovir 200mg	Auto	No Reason Indicated	
5	1000006	15/06/2015	Patient, Test	Gummies Vitamins	Auto	No Reason Indicated	
6	1000014	16/10/2015	Patient, Test	Aerius 5mg	Auto	New Rx	
7	1000015	16/10/2015	Smith, John	Abilify 15mg	Auto	New Rx	

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



#	RxNum	Fill Date	Patient	Drug	Type	Reason	Comment
1	1000009	29/09/2015	Doe, John	Mylan-Atenolol 50mg	Auto	No Reason Indicated	
2	1000012	16/10/2015	Doe, John	Apo-Oxybutynin 5mg	Auto	New Rx	
3	1000013	16/10/2015	Doe, John	Accupril 40mg	Auto	New Rx	
4	1000003	15/06/2015	Patient, Test	Acyclovir 200mg	Auto	No Reason Indicated	
5	1000006	15/06/2015	Patient, Test	Gummies Vitamins	Auto	No Reason Indicated	
6	1000014	16/10/2015	Patient, Test	Aerius 5mg	Auto	New Rx	
7	1000015	16/10/2015	Smith, John	Abilify 15mg	Auto	New Rx	

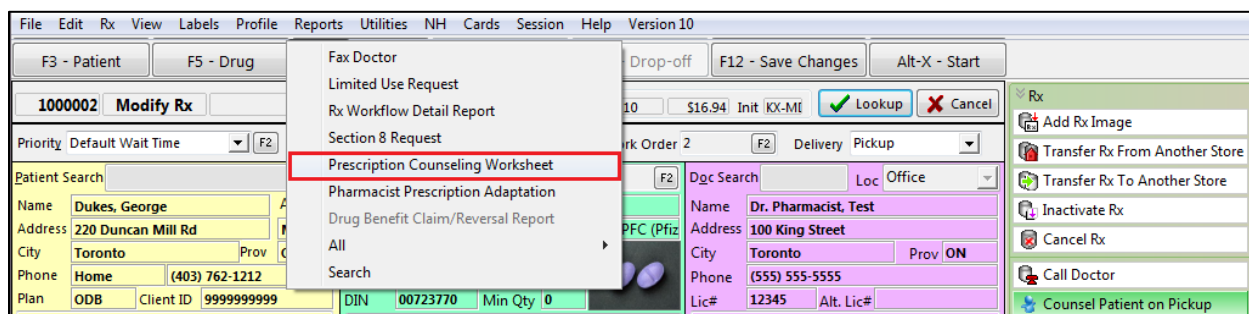
A **Prescription Counseling Worksheet** like the one below will generate:

Prescription Counseling Worksheet			
RxNum <b>1000009</b>	CounselingDate	Method	<input type="checkbox"/> Accepted <input type="checkbox"/> Rejected
OrigRxNum <b>1000009</b>	AgentName	AgentRelationship	
Patient <b>Doe, John</b> 100 Yonge St Toronto ON M1K 4X5 Home: (222) 222-2222	Drug <b>Mylan-Atenolol</b> Atenolol DIN: 02146894 Form: TAB    Mfr: MYL    Schedule: 1		Prescriber <b>Test, Test</b> 220 Duncan Mills Road Toronto ON (555) 555-5555
<b>Counseling Points Reviewed</b> <div style="margin-top: 5px;"> <input type="checkbox"/> Have you taken this medication before _____            _____         </div> <div style="margin-top: 5px;"> <input type="checkbox"/> What the medication is for _____            _____         </div> <div style="margin-top: 5px;"> <input type="checkbox"/> How to take the medication _____            _____         </div> <div style="margin-top: 5px;"> <input type="checkbox"/> When to take the medication and for how long _____            _____         </div> <div style="margin-top: 5px;"> <input type="checkbox"/> Special administration instructions _____            _____         </div> <div style="margin-top: 5px;"> <input type="checkbox"/> Potential side effects _____            _____         </div> <div style="margin-top: 5px;"> <input type="checkbox"/> Interactions with other meds (Rx &amp; OTC), food and alcohol _____            _____         </div> <div style="margin-top: 5px;"> <input type="checkbox"/> What to do if dose is missed _____            _____         </div> <div style="margin-top: 5px;"> <input type="checkbox"/> How to know that medication is working _____            _____         </div> <div style="margin-top: 5px;"> <input type="checkbox"/> Proper storage _____            _____         </div> <div style="margin-top: 5px;"> <input type="checkbox"/> Refills - when and how to request _____            _____         </div> <div style="margin-top: 5px;"> <input type="checkbox"/> Effect on other conditions (if applicable) _____            _____         </div> <div style="margin-top: 5px;"> <input type="checkbox"/> Self-monitoring techniques _____            _____         </div> <div style="margin-top: 10px;"> <b>Comments:</b> _____            _____         </div>			
Counseled by: _____ Signature: _____ Date: _____			
Printed on: 16/10/2015 12:05:40 <span style="float: right;">Page 1</span>			



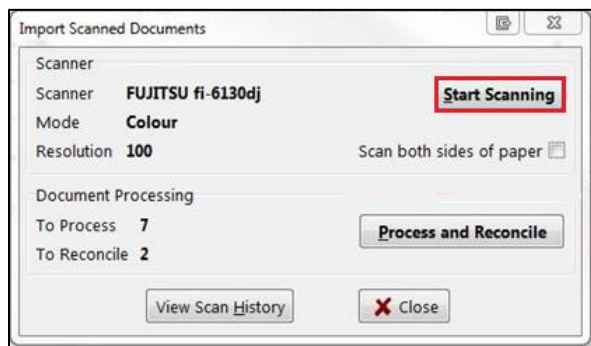
## Method 2: From the F12 screen

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**.

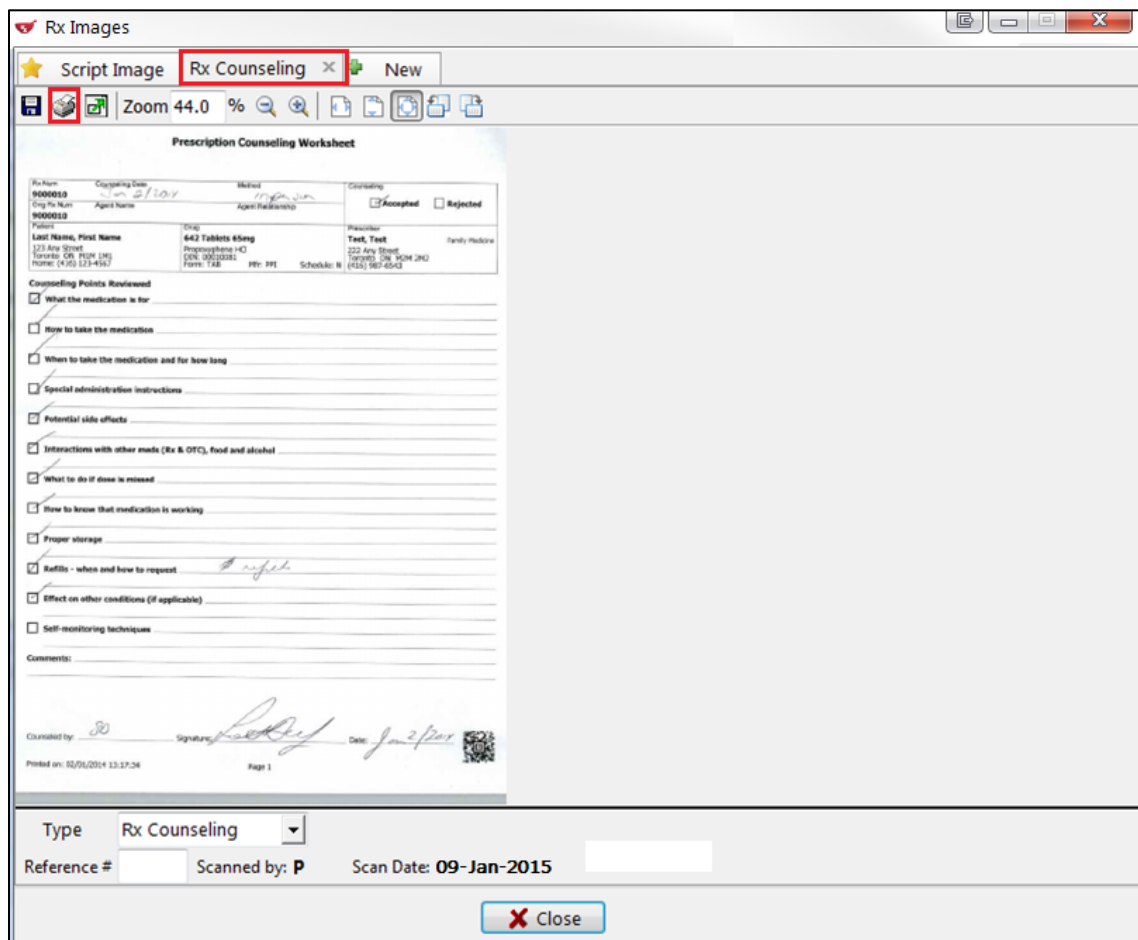


3. Complete the scan document process as per normal procedures. The counseling record will no longer appear in the **Counseling Items** screen.

## 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.

- Click the **Rx Counseling** tab.



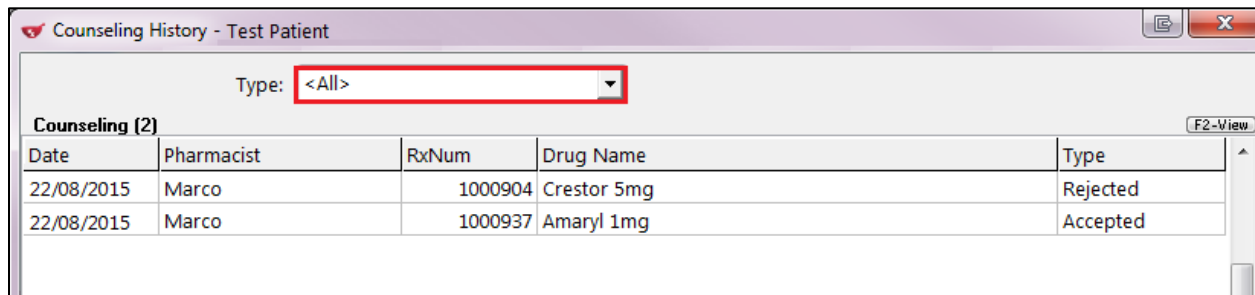
- If you need to reprint the worksheet, click the **Print** icon in the upper left corner of the **Rx Images** window.
- When you are finished, click **Close**.

## Viewing Counseling History

### Method 1: From the Patient Profile

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

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



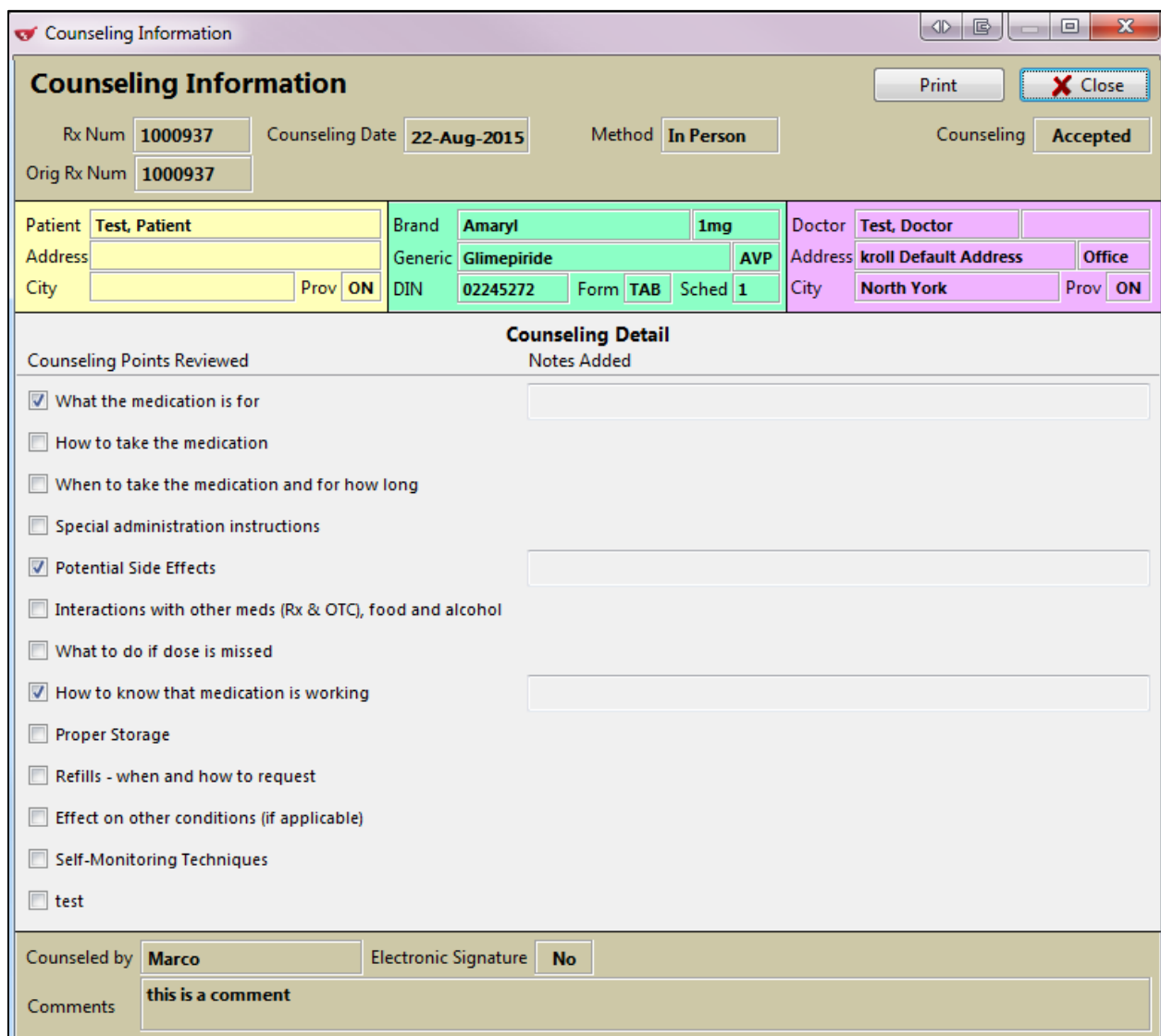
Counseling History - Test Patient

Type: <All>

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

F2-View

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



Counseling Information

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

Orig Rx Num: 1000937

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

**Counseling 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	

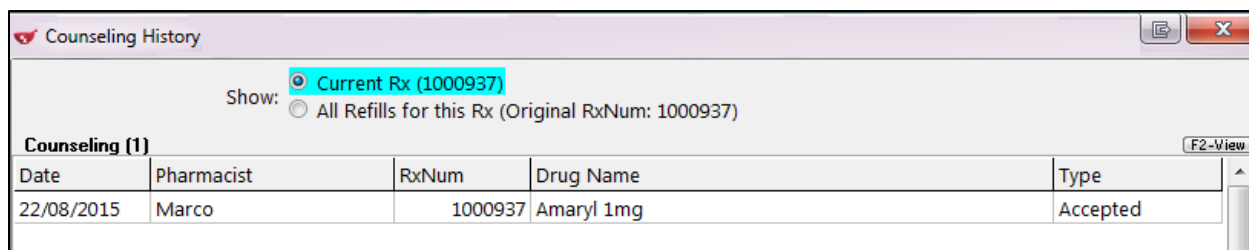
Counseled by: Marco Electronic Signature: No

Comments: this is a comment

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

## Method 2: From the Rx Screen

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



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

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

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