Medication Reviews
British Columbia
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Medication Reviews - British Columbia

This document outlines how to configure Medication Review functionality in Kroll and the process of completing Medication Reviews for both paper based and electronic records.

Configuration

This section explains the configuration settings that must be in place before attempting to use the Medication Review functionality.

Configuring Electronic Signatures

**NOTE:** Only complete this section if you are using Electronic Signature pads.

Before you can begin configuring electronic signatures, **Allow Electronic Signatures** must be enabled in **File > Configuration > Kroll > Configuration**. This will require a support call and must be completed before proceeding.

1. Go to **File > Configuration > Store > General**.
2. Place a checkmark next to **Allow Electronic Signatures**.
3. Click **OK** to save the changes.
Configuring Electronic Medication Reviews


2. In the Med Reviews/Dialogs area above, ensure the following options are set appropriately.

   - **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.

3. Click OK.
NOTE: If you turn off the Require Electronic Signature option and keep the other options enabled you will still be able to complete the reviews on-screen. However, you will need to print the report, in order to capture pen-to-paper signatures and then scan it back into the system before giving it to the patient.

Electronic Medication Reviews

This section explains how to perform an Electronic Medication Review. Ensure your system is configured for Electronic Medication Reviews before proceeding. See Paper Medication Review for information on the non-electronic process.

NOTE: The automatic prompts will not appear if the patient does not meet the criteria for a Medication Review. However, based on other available information and your professional judgement, you can determine whether the patient might benefit from a Medication Review and then manually create a Medication Review.

Configuring the Medication Review Prompt

The system prompts for Medication Review when the option Prompt for Medication Review is enabled under File > Configuration > Store > Rx > Prompting.
When the option ‘Prompt for Medication Review’ is enabled, the system screens each patient for Medication Review eligibility every time an Rx is processed. If the patient is eligible, the user is prompted and presented with a number of options as shown below.

- **Add to Med Review Queue**: Selecting this option adds the Med Review record to the Medication Reviews queue which can be accessed from the Patient record or F9 – Workflow. See section ‘Completing Medication Reviews ‘Saved for Later’’ for further details.

- **Do not prompt me until the next time the patient comes in**: This will suppress prompting for today. The next time the patient comes in to fill an Rx, you will be prompted for the Medication Review.

- **Do not prompt until**: This will allow you to dismiss the prompt for a specified number of days, or until a specified date, after which the prompt will appear.

- **Never prompt for this patient**: This will suppress any further prompts for this patient. This option is only available if the configuration option of Allow ‘Never Prompt’ for Medication Review is enabled.

- **Undecided**: The prompt will re-appear once again the next time a prescription is filled for the patient.
Creating an Electronic Medication Review (Manual)

1. Bring up the patient card using the F3 Patient search.

2. Select Medication Review/Dialogs from the right navigation pane.


4. The Medication Review/Dialog screen will appear. Select a review type from the dropdown menu and click Perform Now. If you wish to add to the Med Review queue in order to complete the Medication Review later, click Save for Later.
5. The **Medication Review Rx Selection** screen will appear. Rxs under the **Pre-Selected** tab are selected by default; Rxs on the other tabs are not. Proceed through each tab and check the Rxs you want included in the report.

- **Select Do Not Profile Rxs** if you want the report to include Rxs that have been filled at your pharmacy only.

- **Select Profile Other Store Rxs (TRS)** if you want the report to include Rxs that have been filled at your pharmacy and at other pharmacies.

Use the **Include last [x] month(s) of Pharmanet Rxs** to specify a date range.

- If you have electronic signatures enabled, the **Pharmanet Medications** section will have an option called **Profile All Rxs (TPR)**. Select this option if you want to include all Rxs for the patient available on the Pharmanet network in the report. Note that Rxs filled at your pharmacy may appear twice on the report if this option is selected.
When you are finished, click **OK**.

6. The *(MR-S) - Standard* screen will appear. Click **Next** to proceed through the tabs, completing the required fields as you go.

**NOTE:** The type of review that is displayed on screen depends on what type of review was selected in Step 4. In this example, the *(MR-S) - Standard* screen appears.

**Questions**

The **Questions** tab includes a list of questions that the pharmacist is to ask the patient to better understand their situation. Answers are recorded by selecting the appropriate option from each dropdown menu.
Medical History

The Medical History tab displays the medications that have been selected on the Medication Review Rx Selection screen.

For each medication listed:

- Note if the patient is currently taking the specified medications and select Yes/No from the dropdown list.
- Enter the reason for using the medication based on the patient’s feedback in the Indications field.
- Enter any general comments in the Comments field.

Use the Del button to delete a record from the Medical History tab.
If you indicated that one or more of the patient's medications has a drug therapy problem on the Questions tab, a Drug Therapy Problem Details section will appear for each identified medication(s) and a consultation sheet will print for each. Complete the necessary Drug Therapy Problem Details fields before proceeding to the next tab.

Note that if you enter a Therapy Problem, the Medication Review type will change to MedReview Standard (MR-S + MR-PC).
Non-Prescription Medications

The **Non-Prescription Medications** tab provides space to record any OTC/non-prescription medications the patient is taking.

Click **Ins** to add a non-prescription medication to the tab.

- Note if the patient is currently taking any OTC medications and select **Yes/No** from the dropdown list.
- Enter the name of the medication in the medication field.
- Enter any appropriate comments in the comments field.

Use **Del** buttons to remove any OTC items.
General Comments

The General Comments tab provides space to record any comments you want included on the report printout.

Pharmacist Comments

The Pharmacist Comments tab provides space to record any comments that the pharmacist wishes to enter concerning the medication or patient in the free form.

7. When you are finished click Finalize Review.
8. The **Medication Review** prompt will appear. If you have **Allow Editing Counseling Time** enabled, enter the amount of time it took to complete the review in the **Time spent** field.

   The **Assessment Location** information is pre-populated with the pharmacy information. If the Medication Review was physically conducted in another location (LTC facility, patient’s home) other than the pharmacy, enter the name of the location and the address. Complete the **Other Professional Involved** fields if another health professional assisted with the review.

   When you are finished, click **OK**.

   ![Medication Review Prompt](image)

**Affixing an Electronic Signature**

**NOTE**: If you do not have an electronic signature configured, print the **Medication Review Report**, have both the patient and the pharmacist sign the report, and scan it back into the system.

9. Have the patient sign his or her name on the electronic signature tablet. Click the **OK** button on the signature tablet.

   ![Signature Tablet](image)
The patient signature appears once the patient signs on the electronic signature tablet.

10. Have the pharmacist sign the electronic signature tablet.

11. When you are finished, tap Done on the signature tablet.

**Printing a Medication Review**

12. A prompt will appear asking if you want to print a paper copy of the electronic Medication Review. Click Yes.

13. The **Medication Review report** print form will appear. Select the appropriate print options and select the appropriate user from the **Prepared by** field. Click Print and provide this copy to the patient.
Billing a Medication Review

14. Once printing is complete, the **Fee For Service** claim will automatically populate in the **F12** screen. If necessary, perform a doctor search to locate the pharmacist to use as the prescriber and ensure all of the other information entered on the **F12** screen is correct.

**NOTE:** If the user account of the pharmacist logged into the terminal during the processing of the Medication Review includes a license number that is identical to the license number of a Prescriber card in the Doctor file, then the Prescriber field on the **F12** screen for the claim will be populated with that prescriber.
15. Click **F12 - Fill Rx**. The claim will be transmitted to the appropriate party for payment.

**Medication Review Options**

Several Medication Review options are available from the right navigation pane on the **(MR-S) - Standard** screen.
Review

Print Medication Review
When this option is selected, the Medication Review report screen will appear, allowing you to set various print options. Configure the appropriate print options. Select Preview to view the report or Close to exit.
Select Rxs for review

If you wish to add/edit Rxs on the Medical History tab, click the button Select Rxs for review. When selected, the Medication Review Rx Selection screen will appear, allowing you to add and remove items from the Medical History tab on the Medication Review Annual Review screen. Click OK to save any changes and Cancel to close the screen.

View Follow Ups

When this option is selected, the Medication Review Follow-ups screen will appear, allowing you to create follow-up reviews for the patient.

NOTE: This is something that you initiate to follow up with the patient after the Medication Review has been completed. This is NOT a Medication Review Followup review.
To add a follow-up, click **Ins** and complete the **Medication Review Follow-up** screen. When you are finished, click **Save**.

![Medication Review Follow-Up](Image)

**View**

**Patient Charting**

When this option is selected, the **Patient Charting** form will appear, displaying information about the patient’s weight, height, blood pressure, blood sugar, and so on.
Use the F2, Ins, and Del buttons to modify, insert, or delete information on this screen. Click Print to print or Cancel to close the screen.

**Patient Documents**

When this option is selected, the Patient Document List will appear displaying a list of documents associated with the patient.

![Patient Document List](image)

Use the F2, Ins, and Del buttons to modify, insert, or delete a patient document. Click Close to exit the screen.

**Patient Medication Reviews**

When this option is selected the Patient Medication Reviews and Dialogs screen will appear, displaying a history of all reviews for the patient including any that are currently in the Medication Review queue.

![Patient Medication Reviews and Dialogs](image)

Double-click a Medication Review to view its details. Click Close to exit the screen.

**Profile**

The Profile menu on the Medication Review Annual Review screen is identical to the Profile menu on the patient profile. This menu allows you to view All Rxs, Active Rxs, Active Rxs w/ Passtimes, Pricing Profile, and Not Disp/OTC Profile.
Completing Medication Review ‘Saved for Later’

1. To call up Medication Reviews ‘Saved for Later’ or added to the Med Review Queue via auto prompting, do one of the following:

**Patient Card**

a) Bring up the patient card using the F3 Patient search and select Medication Review/Dialogs from the right navigation pane.

b) The Medication Reviews queue appears with all the Med Review records that are pending review.

c) Select the Medication Review record you want to complete and click F - Call Up.

**F9 - Workflow**

a) Select F9 - Workflow from the Alt-X Start screen and select Medication Reviews from the right navigation pane.

b) The Medication Review queue will appear. Select the Medication Review you want to complete and click F - Call Up.

2. Complete steps 3-8 of the Creating an Electronic Medication Review section.
Sample Electronic Medication Review Report

- This printout only includes Rx items that were marked as **Currently Taking** in the (MR-S) - Standard screen.
- Provide this printout to the patient.
- The **CURRENT MEDICATIONS** section of this report includes Rx items that were marked as **Currently Taking** in the *(MR-S) - Standard* screen.

- The **CLINICALLY RELEVANT MEDICATIONS THE PATIENT IS NO LONGER TAKING** section includes Rx items that were not marked as **Currently Taking** in the *(MR-S) - Standard* screen.

- This printout is for pharmacy use only and should not be provided to the patient.
A (MR-PC) - Pharmacist Consultation sheet will be printed for each medication with an identified Therapy Problem on the (MR-S) - Standard screen.

This printout is for pharmacy use only and should not be provided to the patient.
Viewing a Completed Medication Review

With Electronic Signatures Enabled

1. Bring up the patient card using the F3 Patient search.
2. Select Medication Review/Dialogues from the right navigation pane.
3. Highlight the completed Medication Review and click F2 - View Details.
4. The MedReview Standard (MR-S) screen will appear. Click the various tabs to see the Medication Review information that has been entered.
5. Click Print to print the Medication Review, or View Signatures to view the pharmacist’s or patient’s electronic signature.

Scanned Reviews with Manual Signatures

1. Bring up the patient card using the F3 Patient search.
2. Select Medication Review/Dialogues from the right navigation pane.
3. Highlight the completed Medication Review and click **F2 - View Details**.

4. The **MedReview Standard (MR-S)** screen will appear. The **Review** tab displays information entered on-screen during the Medication Review; the **Documents** tab displays the scanned image of the signed Medication Review. Scanned paper Medication Reviews is also viewable from Patient Documents.

5. Click **Print** to print the Medication Review.
Paper Medication Reviews

This section explains how to perform paper Medication Reviews. Paper Medication Reviews must be completed on paper, signed, and scanned back into the system.

**NOTE:** The automatic prompts will not appear if the patient does not meet the criteria for a Medication Review. However, based on other available information and your professional judgement, you can determine whether the patient might benefit from a Medication Review and then manually create a Medication Review.

Configuring the Medication Review Prompt

The system prompts for Medication Reviews when the option **Prompt for Medication Review** is enabled under **File > Configuration > Store > Rx > Prompting.**

![Store Level Configuration Parameters](image-url)
When the option ‘Prompt for Medication Review’ is enabled, the system screens each patient for Medication Review eligibility every time an Rx is processed. If the patient is eligible, the user is prompted and presented with a number of options as shown below.

- **Print Report Now**: This will call up the Medication Review report so you can select the items you would like to print on the report.

- **Print Report Later**: This places a record in the Medication Review queue allowing you to print the Medication Review at a later date or time. See section ‘Completing Medication Reviews ‘Saved for Later’ for more details.

- **I have Other Rxs to fill for this patient**: This will allow you to continue filling more Rxs for the patient before printing the report.

- **Do not prompt me until the next time the patient comes in**: This will suppress prompting for today. The next time the patient comes in to fill an Rx, you will be prompted for the Medication Review.

- **Do not prompt until**: This will allow you to dismiss the prompt for a specified number of days, or until a specified date, after which the prompt will appear.

- **Never prompt for this patient**: This will suppress any further prompts for this patient. This option is only available if the configuration option of Allow ‘Never Prompt’ for Medication Review is enabled.
Creating a Paper Medication Review (Manual)

1. Bring up the patient card using the **F3 Patient** search.

2. Select **Medication Review/Dialogs** from the right navigation pane.


4. The **Medication Review/Dialog** screen will appear. Select a review type from the dropdown menu and click **Print Now**. If you wish to add to the Med Review queue in order to print the Medication Review later, click **Save for Later**.
5. The **Medication Review Rx Selection** screen will appear. Rxs under the **Pre-Selected** tab are selected by default; Rxs on the other tabs are not. Proceed through each tab and check the Rxs you want included in the report.

- Select **Do Not Profile Rxs** if you want the report to include Rxs that have been filled at your pharmacy only.

- Select **Profile All Rxs (TRP)** if you want to include all Rxs for the patient available on the Pharmanet network in the report. Note that Rxs filled at your pharmacy may appear twice on the report if this option is selected.

- Select **Profile Other Store Rxs (TRS)** if you want the report to include Rxs that have been dispensed in your pharmacy and in other pharmacies.

  Use the **Include last [x] month(s) of Pharmanet Rxs** to specify a date range.

When you are finished, click **OK**.
6. The **Medication Review Report** form will appear. Check **Print Best Possible Medication History Worksheet** if you want to generate this worksheet.

   Select the appropriate print options and select the appropriate user from the **Prepared by** field. Click **Print**.

   ![Medication Review Report Form](image)

7. Complete the Medication Review on the form. Sign the **Medication Review Report** and have the patient do the same.
Scanning Medication Review Reports

8. From the Alt-X Start screen, go to Utilities > Printed Document Scan/Import.

9. The Import Scanned Documents screen will appear. Place the report pages face down on the scanner hopper. Check Scan both sides of paper if you are scanning pages with information on both sides and your scanner supports dual side scanning. Click Start Scanning.
10. When scanning is complete, the screen will indicate how many pages were scanned successfully and how many will need to be manually reconciled. When you are finished, click **Process and Reconcile**.

11. The **Document Scan Reconciliation** screen will appear. Items ready to be processed will appear in the **Documents to be created** section. Items that need to be reconciled will appear in the **Unprocessed Images** section.
12. If all Rxs were scanned successfully and appear in the Documents to be created section, click the Process Pending Documents button. Click Cancel to close the screen.

Billing a Medication Review

13. Once scanning is complete, the Fee For Service claim will automatically populate in the F12 screen. If necessary, perform a doctor search to locate the pharmacist to use as the prescriber and ensure all of the other information entered on the F12 screen is correct.

14. Click F12 - Fill Rx. The claim will be transmitted to the appropriate party for payment.

Completing Medication Review ‘Saved for Later’

1. To call up Medication Reviews ‘saved for later’, do one of the following:

Patient Card

a) Bring up the patient card using the F3 Patient search and select Medication Review/Dialogs from the right navigation pane.
b) The Medication Reviews queue appears with all the Med Review records that are pending review.

c) Select the Medication Review record you want to complete and click F - Call Up.

F9 - Workflow

a) Select F9 - Workflow from the Alt-X Start screen and select Medication Reviews from the right navigation pane.
b) The Medication Review queue will appear. Select the Medication Review you want to complete and click F - Call Up.
2. Complete steps 4-14 of the Creating a Paper Medication Review section.

Sample Paper Medication Review Report

- This printout only includes Rx items that were selected on the Medication Review Rx Selection screen.
- Provide this printout to the patient.
• The **CURRENT MEDICATIONS** section of this report includes Rx items that were marked selected on the **Medication Review Rx Selection** screen.

• The **CLINICALLY RELEVANT MEDICATIONS THE PATIENT IS NO LONGER TAKING** section includes inactive Rxs.

• This printout is for pharmacy use only and should not be provided to the patient.
This printout details Rxs from Pharmanet only. If you are printing all Rxs from Pharmanet, this printout will also include Rxs that are on the patient’s local profile.

**Viewing a Completed Medication Review**

1. Bring up the patient card using the **F3 Patient** search.
2. Select **Medication Review/Dialogs** from the right navigation pane.
3. Highlight the completed Medication Review and click **F2 - View Details**.
4. The (MR-S) - Standard screen will display the scanned image of the completed Medication Review. Scanned Medication Reviews are also viewable from Patient Documents.
Declined and Refused Medication Reviews

This section explains the process for recording Medication Reviews that have been declined by the pharmacist or refused by the patient.

**NOTE:** The medication review records that are declined by the pharmacist or patient refused can also be noted from the Medication Review queue on the F9-Workflow screen.

**Pharmacist Declined**

1. Bring up the patient card using the **F3 Patient** search.
2. Select **Medication Review/Dialogs** from the right navigation pane.
3. Select the appropriate Medication Review and click **D – Pharmacist Declined**.
4. Select the appropriate option from the **Decline/Refuse** prompt.

   - If you select **Do not prompt until the next time the patient comes in**, no further action is required until the next time the patient visits the pharmacy.
If you select **Do not prompt until...** you will be prompted to specify the next time you want to be prompted for the patient’s Medication Review. Complete the form and click **OK**.

If you select **Never Prompt for this patient** you will not receive any additional Medication Review prompts for the patient.

**Patient Refused**

1. Bring up the patient card using the **F3 Patient** search.

2. Select **Medication Review/Dialogs** from the right navigation pane.

3. Select the appropriate Medication Review and click **R – Patient Refused**.

4. Select the appropriate option from the **Decline/Refuse** prompt.

   - If you select **Do not prompt until the next time the patient comes in** you will be prompted to specify if the review was declined by the **Patient** or **Someone Else**.
     - If you select **Someone Else**, the **Medication Review/Dialog Refusal** form will appear. Click the lookup button next to the **Select agent** field to search for the patient who refused the review. Select a relationship from the **Relationship to patient** menu and click **OK**.
No further action is required until the next time the patient visits the pharmacy.

- If you select **Do not prompt until...** you will be prompted to specify the next time you want to be prompted for the patient’s Medication Review. Complete the form and click **OK**.

- If you select **Never Prompt for this patient** you will not receive any additional Medication Review prompts for the patient.

**NOTE:** Medication Review records that have been refused or declined cannot be deleted from the Medication Reviews queue.

### Medication Review Statuses

This section explains the statuses that appear in the **Medication Review** queue at various stages throughout the Medication Review process.

#### Statuses

**Pending**
Reviews that have been initiated but have not yet been completed.

**Printed Paper**
Reviews that have been printed but have not yet been billed.
**Completed**
Reviews that have been printed and billed.

**Declined by Pharmacist**
Reviews that have been declined by the pharmacist.

**Refused by Patient**
Reviews that have been refused by the patient.

**Fee Statuses**

**Review Not Completed Yet**
Reviews that have been initiated but have not yet been completed.

**No Fee Applicable**
Reviews with no associated fees (usually declined or refused reviews).

**Pending Claim**
*Electronic reviews:* Completed reviews with a Status of **Completed**.
*Paper reviews:* Reviews that have been printed and the option **Require Document scan to complete Paper Med Review** is off, and reports that have been printed and scanned back into the system if this option is enabled.