

AutoFill in PharmaClik Rx

User Guide

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Introduction

AutoFill is the newest enhancement to our successful Refill Reminder Service. It provides patients with optional enrollment to a service that automatically refills their chronic medications once the prescriptions are due for refill. This program works with Rx Ready, where the outbound calling service notifies patients when their prescriptions are ready for pickup.

As noted, this is an opt-in program and patients may choose to enroll, as well as specify which prescriptions should be added to the AutoFill Service. Patients do not receive Refill Reminder calls for prescriptions enrolled in AutoFill; Rx Ready calls will continue to be placed to the patient once an AutoFill prescription is refilled.

Using the AutoFill service, pharmacists have the ability to better manage their daily workflow by processing the refills during non-peak times. Additionally, a reporting feature provides stores with AutoFill enrollment statistics, from numbers and percentages of patient and prescription enrollment, to the reasons patients have stated for declining the service.

★★ IMPORTANT TIPS TO REMEMBER ★★

- **Days supply must be accurate.** Since AutoFill calculates the next Refill Due date based on the days supply entered for the prescription, it is CRITICAL that an accurate days supply be entered by dispensary staff.
 - **ALL prescription receipts must be scanned** in POS when picked up, even if the patient pays \$0.00 copay. In order for the system to know that patients have picked up prescription(s) and accurately calculate the next Refill Due date, EACH and EVERY prescription must be scanned, including deliveries.
-

 Refer to the **IVR Outbound Calling** section for details on Outbound Calling features of Rx Ready and Refill Reminder.

Configuring PharmaClik Rx for AutoFill

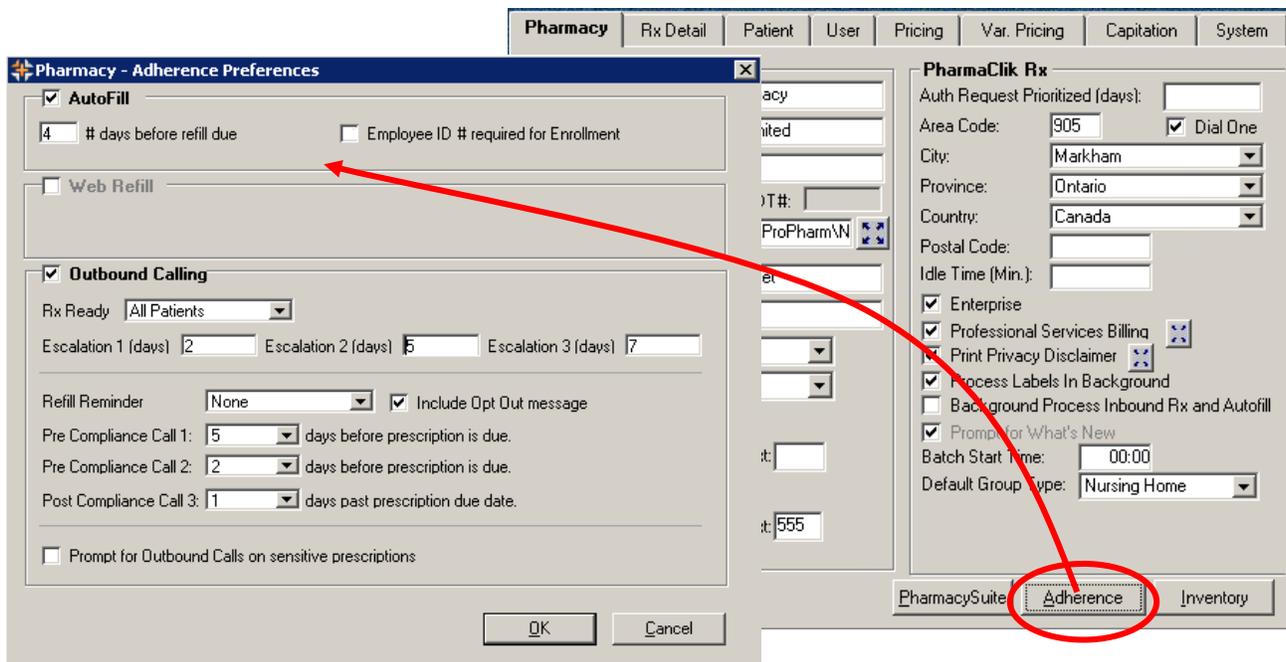
Set your pharmacy's AutoFill preferences in PharmaClik Rx in Reminder Preferences in the Pharmacy folder, as shown below.

1. From the Pharmacy folder, select **More > Pharmacy**.
2. On the Pharmacy tab, select the **Adherence** button. The Adherence Preferences window opens.

The Adherence Preferences window consists of three group boxes, where preferences are set for these services:

- AutoFill
- Web Refill (greyed out if not available to your pharmacy)
- Outbound Calling

Refer to **IVR Outbound Calling** section for steps to set Outbound Calling preferences.



To turn ON AutoFill, in the AutoFill group box:

1. Select the AutoFill checkbox. A checkmark displays indicating AutoFill is enabled.
2. In the **# days before refill due**, enter the number of days before the prescription's refill due date that you want it added to the To Do tab on the Workbench.
 - We recommend that you enter the number **4**.
 - Note that this applies only prescriptions for patients enrolled in AutoFill.
3. Select the **OK** button.

AutoFill is enabled. You may now enroll patients in the AutoFill program.

Patient Preferences

AutoFill provides the ability to enroll a patient and the patient's prescriptions in the AutoFill program. Refills for prescriptions selected are automatically placed on the Workbench To Do tab.

Enrolling a Patient in AutoFill

To access patient enrollment:

1. Open the patient's folder.
2. Select the **Preferences** tab.
3. Select the **Adherence** button. The Adherence Preferences window opens.
4. Select the **Enroll** button. The AutoFill – Enrollment window opens.
5. Choose **Accepted** from Enrollment dropdown list.
6. Select the **OK** button. Or to enroll prescriptions, continue with step 6 on the following page.

Notes:

The following prescriptions are **not displayed** in the Enrollment window:

- Incomplete
- Inactive
- Discontinued
- Suspended
- Transferred

The *Enroll* button is **not accessible** for patients with any of the following statuses:

- Animal
- Deceased
- Hospitalized
- Inactive
- Obsolete
- Out-of-Province
- Nursing Home patients

Enrolling a Patient's Prescriptions

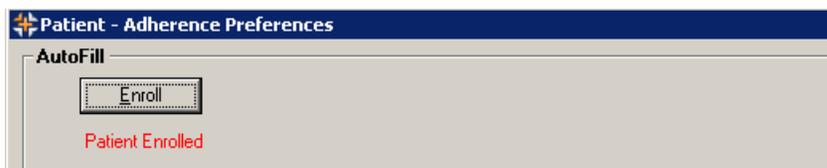
Patients enrolled in this service DO NOT RECEIVE Refill Reminder. Once prescriptions are flagged as AutoFill, any scheduled Refill Reminder calls are automatically deleted. However, Rx Ready calls continue to be placed to the patient when an AutoFill prescription is refilled.

Once a patient is enrolled in the AutoFill program, select prescriptions that the patient would like included in this service.

To enroll a patient's prescriptions in AutoFill:

1. Open the patient's folder.
2. Select the **Preferences** tab.
3. Select the **Adherence** button. The **Patient - Adherence Preferences** window opens.
4. Select the *Enroll* button. The AutoFill Enrollment window opens.
5. Choose **Accepted** from the *Enrollment* dropdown list.
6. Review the list of prescriptions.
 - a) Select the **AutoFill** checkbox to enroll the prescription.
 - b) Continue through the list to add more prescriptions:
 - Use **Select All** button to turn ON the AutoFill checkbox for all prescriptions.
 - Use **Deselect All** button to turn OFF the AutoFill checkbox for all prescriptions.
7. Enter your **Employee ID #**, if required.
8. Select the **OK** button. The screen returns to Patient - Adherence Preferences.
9. Select **Yes** from the *Rx Ready* dropdown list.
10. Select the **OK** button.

When enrollment is complete, a **Patient Enrolled** indicator displays in red text below the *Enroll* button.



11. Select the **OK** button to return to Preferences tab.

STEP 6 TIP

The window lists all active prescriptions that have been filled for this patient within the last **120 days**.

You may select **180 days** to see the last 180 days. Or, select **All Active** to see all active prescriptions on the patient's Profile.

STEP 8 TIP

Did a validation message display?

If the prescription is open in Rx Detail, on *any* workstation, a validation message appears and you will not be able to select that prescription for enrollment.

To resolve this, check Rx Detail on all the workstations to find the open prescription(s) and close it (them).

Then return to the AutoFill window and continue with enrollment.

The selected prescriptions are placed on the Workbench To Do tab for the future fill date.

- The future fill date is the number of days – as set in the Pharmacy Preferences – before the prescription is due for refill.
- The indicator **WB** appears on the patient's Profile for AutoFill prescriptions (refer to the screenshot below for an example).

Viewing AutoFill Prescriptions on the Profile

To view prescriptions enrolled in AutoFill, go to the patient's Profile. There is a **WB** indicator in the far right column beside the Active flag (**WB** stands for Workbench).

This means the prescription the next refill is waiting on the Workbench To Do tab for a future date.

Fill Date	Drug Name	Rx#	MFR	REM	Status	Active	
Perf On	Strength	Form	Qty	Instructions			
Jul 16, 2008	APO-OMEPRAZOLE	7491357	APX	3	Complete	<input checked="" type="checkbox"/> WB	
Jul 16, 2008	20MG	CAPSULE DR 180	TAKE 2 TABLETS DAILY				

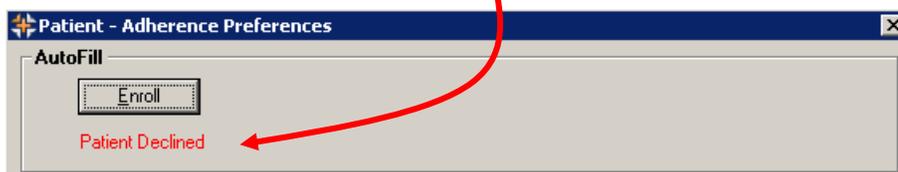
There is an *AutoFill* checkbox in the Rx Detail Extended tab. There is a checkbox in the box when the prescription is enrolled in AutoFill.

Declining AutoFill Enrollment

Patients who decline enrollment will continue to receive Refill Reminder and Rx Ready calls, as part of the regular refill reminder program.

When a patient declines AutoFill enrollment:

1. Open the patient's folder.
2. Select the *Preferences* tab.
3. Select the *Adherence* button. The Patient - Adherence Preferences window opens.
4. Select the *Enroll* button. The AutoFill Enrollment window opens.
5. Choose **Declined** from the *Enrollment* dropdown list.
6. Make a selection from the *Decline Reason* dropdown list.
7. Enter your *Employee ID #*, if required.
8. Select the *OK* button.
9. When enrollment is declined, a **Patient Declined** indicator displays in red text below the *Enroll* button.



12. Select the *OK* button to return to Preferences tab.

Opting Out of AutoFill for Enrolled Patients

An enrolled patient may choose to opt-out of the AutoFill service at any time.

To remove the patient from the, follow the steps listed above for 'When a patient declines AutoFill enrollment'.

Upon removing the patient from AutoFill, any AutoFill refills that are already on the Workbench To Do tab are removed and the WB indicator is automatically removed from the patient's Profile.

Note If the patient participates in Refill Reminders, when the patient's prescriptions are refilled, they will once again be part of the Refill Reminder Service.

Other Ways to Access AutoFill Enrollment

The previous pages explain how to enroll and decline patients from the Patient folder. The AutoFill Enrollment window can also be accessed from the Rx actions on the Workbench, Profile and Rx Detail.

Accessing AutoFill Enrollment from the Profile

1. Open the patient's folder
2. Select the *Profile* tab.
3. Select the *Rx* button.
4. Select *AutoFill*.
5. The patient's AutoFill Enrollment window opens.
6. Make any necessary changes, such as enrolling a patient, declining a patient, or selecting/deselecting prescriptions for AutoFill (use the procedures described on the previous pages).
7. Select the *OK* button to save changes and return to the Profile, or select the *Cancel* function to return to the Profile without saving changes.

Accessing AutoFill Enrollment from Rx Detail

1. With the prescription open in Rx Detail, select the *Rx* button.
2. Select *AutoFill*.
3. The patient's AutoFill Enrollment window opens.
4. Make any necessary changes:
 - Enroll patient
 - Decline patient, or
 - Select/deselect prescriptions to include/exclude for AutoFill program.
5. Select the *OK* button to save changes and return to Rx Detail, or select the *Cancel* function to return to Rx Detail without saving changes.

Accessing AutoFill Enrollment from the Workbench

To access AutoFill enrollment from the Workbench:

- Highlight a patient on any Workbench tab, or
- Search for a patient without any rows highlighted.

When no prescriptions are highlighted on the Workbench:

1. No prescriptions should be highlighted on the Workbench.
TIP SELECT THE DESELECT ALL BUTTON TO ENSURE NO PRESCRIPTIONS ARE HIGHLIGHTED.
2. Select the *Rx* button.
3. Select *AutoFill*.
4. The Select Prescription window opens. Search for a patient by Rx# or patient name.
 - **To Search by Rx#:** Enter a prescription number in the *Rx(s)* field and select the *OK* button.
 - **To Search by Patient:** Enter the patient's name in the *Patient* field and select the *OK* button. Patient Search appears. Highlight the patient in the search results and select the *OK* button. The patient's Profile opens. Highlight an active prescription on the Profile. Select the *OK* button.
5. The patient's AutoFill Enrollment window opens. Make any necessary changes, such as enrolling a patient, declining a patient or selecting/deselecting prescriptions for AutoFill (use the procedures described on the previous pages).
6. Select the *OK* button to save changes and return to the Workbench, or select the *Cancel* function to return to the Workbench without saving changes.

When a prescription is highlighted on the Workbench:

1. Highlight one of the patient's prescriptions on any Workbench tab.
2. Select the *Rx* button.
3. Select *AutoFill*.
4. Refer to steps 5-6 above, in 'When no prescriptions are highlighted on the Workbench'.

Patient Self-Enrollment

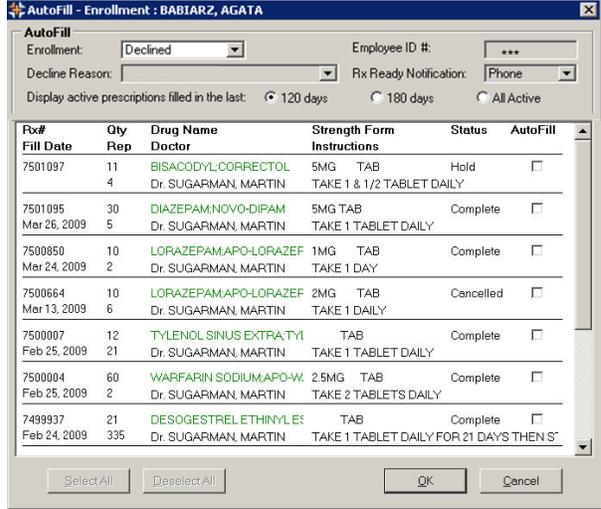
Note: This is only available if you have purchased the IVR service.

The AutoFill program allows patients to self-enroll when refilling prescriptions through the Interactive Voice Response System (IVR), our automated telephone service.

When patients call a pharmacy with an IVR system, the patient is offered a series of automated menu choices, such as refilling one or more prescriptions without speaking to pharmacy staff. In selecting the refill option, after successfully answering all voice-activated prompts and completing the refill procedure, the patient has the opportunity to enroll all refill prescriptions in the AutoFill/AutoFill program and the patient's response is passed from the IVR to PharmaClik Rx—either enrolling the prescriptions, or declining enrollment—and recorded in the AutoFill Enrollment window.

If the patient fails to respond “yes,” or “no,” and instead hangs up, then the prescriptions are neither accepted, nor declined and no changes apply to the Enrollment window.

View changes in the Enrollment window, as shown below.

Accepted	Declined
<p>When a patient responds “Yes” by Selecting menu option 1:</p> <ul style="list-style-type: none"> Enrollment field displays Accepted. Employee ID# field displays *** for IVR. AutoFill displays checkmark. 	<p>When a patient responds “No” by Selecting menu option 2:</p> <ul style="list-style-type: none"> Enrollment field displays Declined Employee ID# field displays *** for IVR. Decline Reason field is blank.
	
<ul style="list-style-type: none"> Because the patient has called in the current refill, the prescriptions are immediately placed on the Workbench To Do tab. Subsequent refills are enrolled in AutoFill and added to the Workbench To Do tab. 	

If the patient wishes to enroll other prescriptions that are not refilled during the call, he or she must speak to the pharmacy staff to do it manually.

Prescriptions & Rx Detail

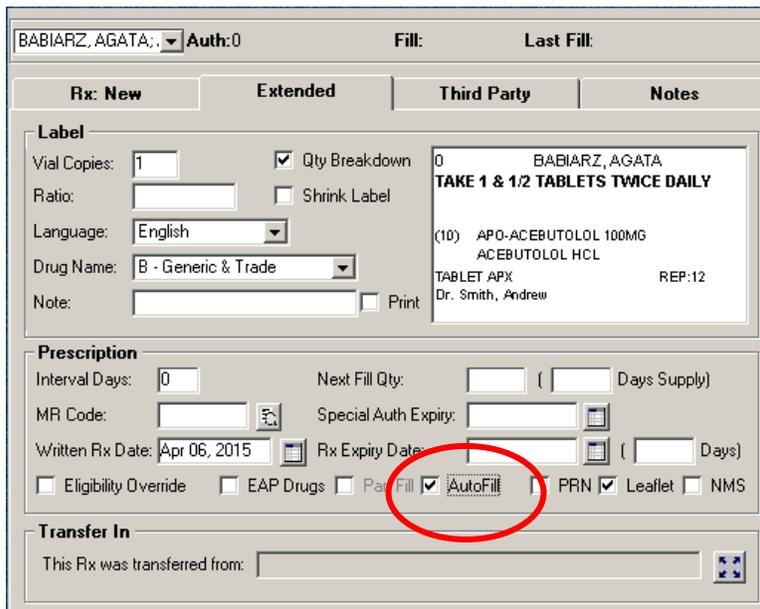
An AutoFill flag in Rx Detail allows you to flag a prescription for AutoFill at the time of filling. It also allows you to remove a prescription from the AutoFill service.

An important aspect of AutoFill is to add new prescriptions to the service, ensuring ongoing increases in program participation and refill volume. Processing in Rx Detail informs you if a patient is enrolled in AutoFill and allows you to add new prescriptions at the time of filling.

Viewing and Editing the AutoFill Flag in Rx Detail

The Rx Detail Extended tab contains an *AutoFill* checkbox that indicates if the prescription is enrolled in AutoFill. You may select or deselect this checkbox to add or remove a prescription from AutoFill.

1. With the prescription open in Rx Detail for processing, select the *Extended* tab.
2. The *AutoFill* checkbox is located near the bottom of the tab. Modify the checkbox as required: prescriptions enrolled in AutoFill have a checkmark in the box; the checkbox is empty for prescriptions that are not enrolled.
3. Continue to fill the prescription as usual.



The screenshot shows the 'Rx: New' tab selected. The patient name is 'BABIARZ, AGATA' and the authorization level is 'Auth:0'. The 'Extended' tab is active. The 'Label' section includes fields for Vial Copies (1), Ratio, Language (English), Drug Name (B - Generic & Trade), and a Note field. The 'Prescription' section includes Interval Days (0), Next Fill Qty, MR Code, Special Auth Expiry, Written Rx Date (Apr 06, 2015), and Rx Expiry Date. The 'AutoFill' checkbox is checked and circled in red. Other checkboxes include Eligibility Override, EAP Drugs, Patient Fill, PRN, Leaflet, and NMS. The 'Transfer In' section has a field for 'This Rx was transferred from:'.

A checkmark in the *AutoFill* checkbox indicates the prescription is enrolled in the AutoFill service.

A checkmark displays alongside this prescription in the patient's AutoFill Enrollment window.

When the *AutoFill* checkbox is empty, the prescription is not enrolled in AutoFill.

Filling a New Prescription for an Enrolled Patient

Follow these steps when filling a new prescription for a patient who is already enrolled in AutoFill.

1. Create and fill the new prescription as usual.
2. Upon Selecting the *Fill*, *Queue*, or *Multi-Fill* button in Rx Detail, you are prompted to include the prescription in AutoFill. Make a selection from the prompt: *Include this prescription in AutoFill* or *Do not include this prescription in AutoFill*.



3. Select the *OK* button.
4. The prescription continues to process as usual.

Once the prescription is complete, it appears in the patient's Profile with a WB indicator, and will also be placed on the Workbench To Do tab four days before the next refill is due.

Filling a Vacation Supply

AutoFill allows you to provide a vacation supply of medication

Your pharmacy can now provide AutoFill patients with a supply of medication to take with them on vacation, for the length of their stay, without delaying subsequent refills.

When the patient returns from vacation, the next refill will automatically appear on the Workbench To Do tab, as with all AutoFill, four days before it is due per your Pharmacy Preferences.

You can manually set date the prescription is placed on the Workbench To Do tab. This vacation supply can be an extra refill, or a refill of different quantity.

Adding Vacation Supply to a New Prescription

On the patient's folder, select the Profile tab.

1. Select the **New** button.
2. On the New Prescription window, enter new prescription details.
3. When the prescription opens in Rx Detail, select the **Extended** tab.
4. Enter prescription information—QA, Qty, SIG—as usual.
5. On the Extended tab, select the **AutoFill checkbox**.
6. Select the Rx button and follow Steps 3–8 below in "Setting the Vacation Supply."
7. Continue to fill the prescription as usual.

Setting the Vacation Supply

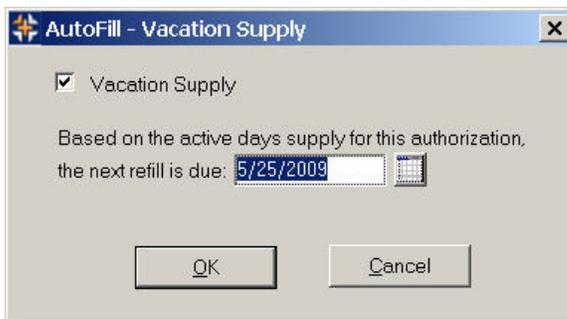
1. Open the prescription for refill as usual.
2. Adjust the amounts in the **QTY** and **DS** fields.
3. Select the **Rx** button and then:
 - a. Select AutoFill.
 - b. Select Vacation Supply.



If the Vacation Supply button is greyed-out, the prescription and/or patient is/are not enrolled in the AutoFill program.

To enroll the prescription, follow the steps on the following page.

4. The Vacation Supply window displays.



Next Refill Date

The next refill date is based on the days supply entered in Rx Detail and the balance remaining in the existing prescription.

To **change the date**, select the calendar icon and select another date.

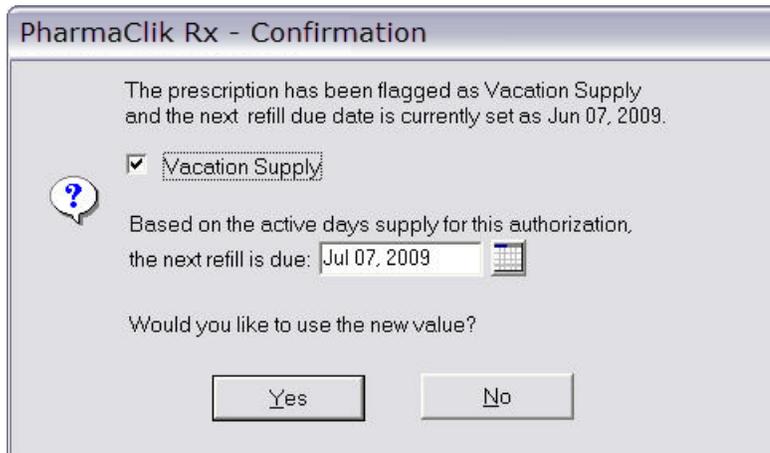
We recommend that you retain the refill date.

5. Select the **Vacation Supply** checkbox to turn ON vacation supply.
6. Verify next refill date.
7. Select the **OK** button to complete the transaction.
 - Select Cancel to get out of the window without setting the Vacation Supply.

Refill Date Prompts

- If the Refill Date is blank, or if it is set to a date in the past, prompts display:
 - Refill date must be in the future.
 - Refill date cannot be blank.
- Respond to the prompts accordingly and enter the correct Refill Date and continue.

If you change the amounts, or tab into the QTY and/or DS fields, once the Vacation Supply is set, a confirmation prompt displays.



- Select **Yes to save** the new QTY and/or DS for vacation supply.
 - Select **No to exit** confirmation prompt. The screen returns to detailed prescription. Return to Step 2 to enter the applicable QTY and DS amounts.
8. Continue to fill the prescription as usual. The Vacation Supply fills process and the subsequent refill is added to the Workbench To Do tab.

To add Vacation Supply *after* adding, or refilling prescription, choose to Amend the prescription and then follow the steps listed above.

Removing the Vacation Supply

To remove Vacation Supply on an open, detailed prescription:

1. Select **Rx button**, and then
 - a. Select AutoFill.
 - b. Select Vacation Supply.
2. The **AutoFill - Vacation Supply** window displays.
3. Select the checked **Vacation Supply checkbox** to turn OFF vacation supply.
4. Select the **OK** button.
5. Select the **OK** or the Save button in Rx Detail.

The first refill or reauthorization performed after the Vacation Supply next refill returns the prescription to its pre-Vacation Supply setting.

Enrolling HOLD Prescriptions

You are able to enroll a retail prescription with Hold status into the AutoFill program. The introduction of prompts for new Hold and existing Hold prescriptions allows you to add refills to the Workbench To Do tab. The new prompt allows you to start the prescription on a specified date at the time to you enroll the prescription into the program. Alternatively, you can enroll a prescription, but not place it on the To Do tab. Even if a patient is enrolled, you can place the prescription on Hold without enrolling it in the AutoFill program.

TIP

When opting to override the default date, by selecting a date from the calendar, it is important to understand the calculation PharmaClik Rx uses in placing the prescription on the To Do tab:

(Days Supply + Picked Up date) less #days before refill due date.

Days Supply + Picked Up date is taken from the prescription filled previous to the Hold, if one exists.

$$\begin{array}{r}
 \text{Days Supply} \\
 + \text{ Picked Up date} \\
 - \text{ Days before refill due} \\
 \hline
 \text{Default date}
 \end{array}$$

Placing a New Prescription on Hold

Follow the standard PharmaClik Rx procedure for filling a new prescription for a patient enrolled in AutoFill.

With the prescription open in Rx Detail:

1. Select the **Hold** button. The following prompt displays:

Follow the instructions to:

- Add the prescription to AutoFill program.
 - Add it to the Workbench To Do tab:
 - for the default date, or
 - on a date you select from the calendar.
 - Do not add it to the Workbench To Do tab:
- Or
- Exclude it from the AutoFill program.

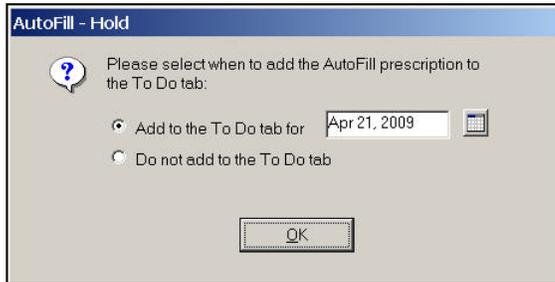
2. Select the **OK** button. The Hold prescription is processed according to these selections.

Placing an Existing Prescription on Hold

Follow the standard PharmaClik Rx procedure for placing an existing prescription on Hold, or refilling a prescription by reauthorizing it and placing it on Hold.

With the prescription open in Rx Detail:

1. Select the **Hold** button. The following prompt displays.



Follow the instructions to:

- Add the prescription to the Workbench To Do tab:
 - for the default date, or
 - on a date you select from the calendar.
- Or
- Do not add it to the Workbench To Do tab.

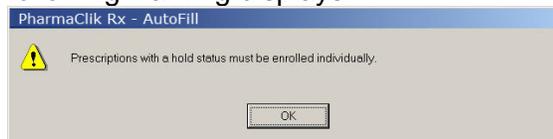
2. Select the **OK** button. The Hold prescription is processed according to the options selected.

Enrolling a Hold Prescription

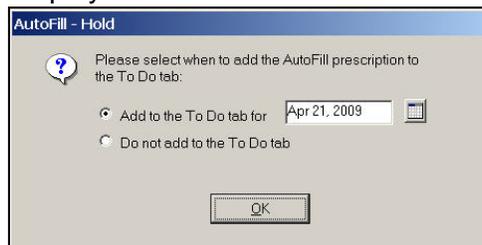
Follow the standard PharmaClik Rx procedures for enrolling a prescription in the AutoFill program using the Preferences tab of the Patient folder, or through the Enrollment option of AutoFill button through the Rx button in Rx Detail.

When the Enrollment window displays:

1. Select the **AutoFill** checkbox to turn ON the flag.
 - a. If you select more than one prescription (by selecting the **Select All** button), the following warning displays:



- b. Select **OK**.
- c. Select **Deselect All**. Select one Hold Prescription at a time. The following prompt displays:



2. Select the **OK** button. The prompt closes.
3. Select the **OK** button on the Enrollment window, if accessed through the Patient folder.

The Hold prescription is now enrolled and is processed according to the options selected.

Canceling an Enrolled Hold Prescription

When a Hold prescription is cancelled after it is enrolled in AutoFill:

- The prescription remains enrolled.
- The date prescription appears on Workbench To Do tab recalculates (based on values taken from the last Complete prescription) Days Supply + Picked Up date, or Fill date. (If a Picked Up date does not exist, date of last Complete prescription.)
- The date displayed in Refill due column adjusts according to the last Complete prescription.

Withdrawing a Hold Prescription from Enrollment

When a Hold prescription is withdrawn from the AutoFill program, even after adding/not adding the prescription to the Workbench To Do tab:

- The AutoFill flag on the prescription turns OFF, and
- The prescription is removed from the Workbench To Do tab.

Amending an Enrolled Hold Prescription

When the days supply is amended for an AutoFill prescription, the prescription appears on the Workbench with a recalculated days supply.

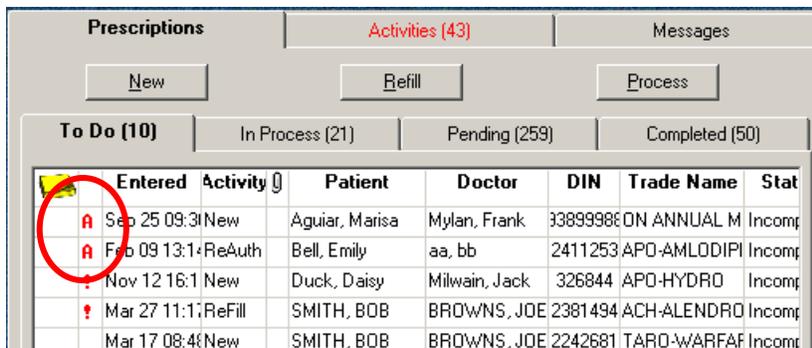
For example, a Hold prescription with 30 days supply is enrolled and added to the Workbench To Do tab with the user-specified date of January 15. When the prescription is amended to 45 days supply, 15 days is added to the prescription on the To Do tab and the adjusted date of January 30 displays.

The Workbench

AutoFill prescriptions are stored in the Workbench To Do tab four days prior to the due date and are identified by a red letter “A” in the Priority column.

There is also a *Refill Due* column, which indicates when the prescription is due for refill. The Refill Due column allows you to prioritize your refills, as you know which refills are due first and therefore need to be filled first.

TIP BY DEFAULT, THE *REFILL DUE* COLUMN IS LOCATED AT THE END OF THE WORKBENCH. TO MOVE THE COLUMN, DRAG AND DROP IT IN ITS NEW LOCATION.



Prescriptions		Activities (43)		Messages			
New		Refill		Process			
To Do (10)		In Process (21)		Pending (259)		Completed (50)	
Entered	Activity	Patient	Doctor	DIN	Trade Name	Stat	
A Sep 25 09:31	New	Aguiar, Marisa	Mylan, Frank	3389998	ON ANNUAL M	Incomp	
A Feb 09 13:1	ReAuth	Bell, Emily	aa, bb	2411253	APD-AMLODIP	Incomp	
Nov 12 16:1	New	Duck, Daisy	Milwain, Jack	326844	APD-HYDRO	Incomp	
Mar 27 11:1	ReFill	SMITH, BOB	BROWNS, JOE	2381494	ACH-ALENDRO	Incomp	
Mar 17 08:4	New	SMITH, BOB	BROWNS, JOE	2242681	TARD-WARFAF	Incomp	

Calculating the Refill Due Date

When a prescription is filled, the Refill Due date is initially calculated based on the Fill Date and the days supply. The prescription is added to the Workbench To Do tab of the date that is four days before the end of the days supply.

When a prescription is picked up and scanned through POS, the *Refill Due* date is re-calculated based on the prescription’s Picked Up date and moves the To Do tab for the appropriate re-calculated date.

Populating the Workbench

All prescriptions that are eligible for AutoFill automatically display on the Workbench To Do tab on the applicable future date. The date that the prescription appears on the Workbench To Do tab, is based on the value set in the *# days before refill due* preference: four days before the end of the prescription’s days supply.

Example: The *# days before refill due* is set to 4 and a prescription’s Refill Due date is January 16, the prescription refill is automatically placed on the to the To Do tab for January 12.

Below are two scenarios in which the To Do tab is populated:

Scenario 1: Prescription enrolled before next refill is due

Joan Smith has a prescription for 60-day supply of ENALAPRIL that was last filled January 1.

On January 3, the prescription is enrolled in the AutoFill service. Since this is a 60-day supply, due for refill on March 2, the next refill is immediately placed on the Workbench To Do tab for February 26 (4 days before the due date).

If this prescription was enrolled in AutoFill after the refill due date, the prescription is placed on the Workbench's To Do tab for the current day. For example, if the prescription has not been refilled and is enrolled in AutoFill on March 3, the refill will be placed on the To Do for March 3.

Scenario 2: Refilling a prescription that is already enrolled in AutoFill

Melinda Osbourne's prescription for PLAVIX, a 30-day supply, is already enrolled in the AutoFill service. The prescription was filled on December 1 and the next refill is scheduled for December 31.

The next refill due is added to the Workbench To Do tab at the time of filling a prescription that is enrolled in AutoFill. This occurs once the prescription becomes Complete. In this case, the refill is automatically added to the To Do tab for December 27.

AutoFill Refills Automatically Removed from the Workbench

Since AutoFill refills are added to the Workbench To Do tab in advance, there are certain situations when they are automatically removed from the To Do tab to prevent the refill from being processed.

The various conditions include:

- a. Patient status has been changed, or modified:
 - From *Active* to Animal, Deceased, Hospitalized, Inactive, Obsolete, or Out of Province
 - From Retail to Dispill, Dosett, or Non-Retail
- b. The prescription has been:
 - Cancelled and either put on hold or removed from the profile
 - Discontinued, Inactivate, Suspended, or Transferred

Note When a prescription is SUSPENDED, the AutoFill refill on the Workbench To Do tab is removed. If you enter a reactivation date at the time of suspending, the next AutoFill refill is NOT re-inserted on the To Do tab upon reactivating. Instead, the next AutoFill refill is added *once the prescription has been refilled* after the prescription is reactivated.

- c. The prescription has been removed from AutoFill.
- d. The patient has opted-out of the AutoFill service.
- e. The AutoFill service has been turned OFF for the pharmacy.

Reporting

The AutoFill Summary report provides statistics for all patients and prescriptions enrolled in the AutoFill service within a specific time period, as well as the number of Rx Ready calls generated for AutoFill prescriptions.

Generating the AutoFill Summary

1. Open PharmaClik Rx Reports.
2. Select *Patient* in the report types on the left side of the window.
3. Select *AutoFill Summary* in the list of reports on the right side of the window.
4. Select the *Next* button.
5. Enter a *Start Date* and *End Date*.
6. Select the *Preview* button (optional).
7. Select the *Print* button.

Below is a sample of the AutoFill Summary:

AutoFill Summary										
Pro Pharmacy 131 McNabb St Unit #121 Markham, Ontario L3R 5V7					Date: Apr 08, 2008 Report Period: Apr 01, 2008 to Apr 07, 2008					
Patient Enrollment		Employee	# Patients Enrolled	Decline Reason	#	%	Prescription Enrollment	Rx Ready Calls		
Total # Patients	623	1212	8	Not Interested	8	80.00%	# Enrolled	113	Total # Rx's	1162
# Enrolled	72	3726	6	Acute Therapy	0	0.00%	Total # Rx's	1162	# Rx Ready Calls	781
% Enrolled	11.56%	5464	38	Care Designate declined	0	0.00%	# AutoFill	68	# AutoFill Rx Ready Calls	32
# Declined	10	6899	20	Not my regular pharmacy	1	10.00%	% AutoFill	5.85%	% AutoFill Rx Ready Calls	4.10%
% Declined	1.61%	Total	72	Patient prefers eFILL	1	10.00%				
				Patient prefers Rexall Reminders	0	0.00%				
				Patient Status changed	0	0.00%				
				Patient will call in refills	0	0.00%				
				Total	10					

Patient Enrollment ❶

This is a cumulative total of the number of retail patients in PharmaClik Rx with at least one, active prescription filled within the previous 365 days of the reporting period selected.

Enrollment is reported as number and percentage of patients who enrolled and those who declined within the specified time period.

Employee | # Patients Enrolled ❷

This area reports the number of patients enrollment entries made, per employee, and listed by ascending employee number.

The amount reported as **Total** equals the total number listed in # *Enrolled* in *Patient Enrollment* section.

Decline Reason ❸

The report lists all reasons for patients' refusals to enroll in the AutoFill service, along with the related totals and percentages.

The reasons are listed in alphabetical order after Not Interested.

❷ "Not Interested" always remains at the top of the list, followed by:

- Acute Therapy
- Care Designate declined
- Not my regular pharmacy
- Patient prefers Refill Reminders
- Patient will call in refills

All reasons are listed whether they have been entered, or not. Zeros appear where there is no tally to display.

Prescription Enrollment ❹

The total number of prescriptions filled in PharmaClik Rx is listed here – including those filled using AutoFill.

The total number of prescriptions enrolled are also listed here.

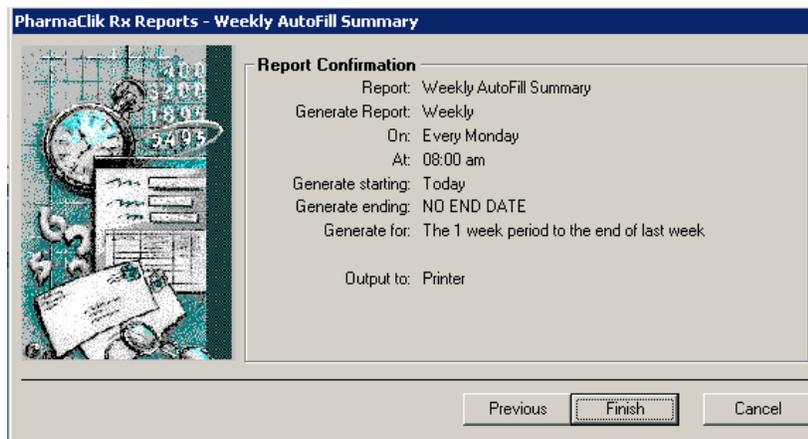
Rx Ready Calls ❺

This section lists the total number of prescriptions filled as well as the number of Rx Ready call opportunities for AutoFill prescriptions.

Scheduling the AutoFill Summary

You may wish to schedule the AutoFill Summary to print on a weekly basis:

1. Open PharmaClik Rx Reports.
2. Select **Patient** in the report types on the left side of the window.
3. Select **AutoFill Summary** in the list of reports on the right side of the window.
4. Select the **Next** button.
5. Select the **Schedule** button.
6. The Report Frequency window opens.
 - a. Highlight **Weekly**, and then select the **Next** button.
7. In Report Timing,
 - a. Highlight **Monday** as the day of the week on which the report will generate.
 - b. Enter **08:00** in the *Time* field.
 - c. In the *First Date* field, enter the first date the report should generate (since the report will run on Monday, enter next Monday's date).
Do not make any other changes in this window.
 - d. Select the *Next* button.
8. The Report Period window allows you choose the time period that will be included on the report.
 - a. To see data from the previous calendar week, do not make any changes to this window.
 - b. Select the *Next* button.
9. In the Report Name window, the name of the report defaults to **Weekly AutoFill Summary**.
 - a. Select the *Next* button.
10. The Report Confirmation window appears. Verify the information in the Report Confirmation.
 - a. Select the *Finish* button if everything is correct.



TIP IF ANYTHING NEEDS TO BE CHANGED, SELECT THE *PREVIOUS* BUTTON TO RETURN TO THE PREVIOUS WINDOWS AND MAKE CHANGES.

11. The screen returns to the report criteria, with two new tabs displayed: Timing and Output. Select the *Save* button.

The report is now listed under *Scheduled* reports and will print at 8:00 a.m. every Monday.

Glossary

As noted in 'Patient AutoFill Preferences' on page 4, the following fields are available in the patient's AutoFill Enrollment window.

Field Name	Field Description
Enrollment	<p>The dropdown list offers Accepted or Declined options to confirm enrollment, or to decline enrollment to AutoFill.</p> <p>When the value is changed from Accepted to Declined, the AutoFill flags for all enrolled prescriptions for this patient are automatically turned off.</p>
Decline Reason	<p>The reason the patient has opted-out of the program. It is mandatory and only available when Declined is selected from Enrollment dropdown list.</p> <p>Select from:</p> <ul style="list-style-type: none"> • Not interested • Acute Therapy • Care Designate declined • Not my regular pharmacy • Patient prefers Refill Reminders • Patient will call in refills <p>An error message appears if a reason is not selected. You may not continue until a selection is made.</p>
Employee ID #	<p>PharmaClik Rx converts the digits to asterisks and displays "*****" in this field to protect the employee's privacy.</p> <p>If not entered, a validation message indicates: <i>Employee ID must be entered.</i></p>
Rx Ready Notification	<p>At the present time, Rx Ready notifications are only sent by telephone, which are the outbound Rx Ready calls.</p>
Display active prescriptions filled in the last	<p>Displays all Active prescriptions with a Fill Date that falls within the specified number of days.</p> <p>However, if a prescription is enrolled in AutoFill, it will display no matter the setting selected.</p> <p>Options are 120 days (default), 180 days, or All Active.</p>

The following fields display in the active prescriptions list section of Enrollment window. The prescriptions display in a condensed version of the list shown on the patient's Profile.

Field name	Field Description
Rx#	Prescription number
Fill Date	The date the prescription was filled.
Qty	Quantity dispensed for that prescription.
Rep	Number of repeats authorized for that prescription.
Drug Name	The name of the drug displayed in green text.
Doctor Name	The name of the prescribing physician.
Strength Form	The strength of the drug.
Instructions	Instructions for the prescription.
Status	Indicates the prescription status: Amend, Amend Next, Cancelled, Completed, Hold, Incomplete, Pending, or Queued.
AutoFill	A checkmark indicates if the prescription is included in AutoFill.

Questions & Answers

Can a patient enrolled in AutoFill switch to Refill Reminders?

If a patient, who is enrolled in AutoFill prefers to receive Refill Reminder calls instead, your pharmacy must have purchased the IVR system.

To remove the AutoFill service, by following these steps:

1. Open the patient's folder.
2. Select the *Preferences* tab.
3. Select the *Adherence* button.
4. Select the *Enroll* button.
5. The AutoFill Enrollment window opens. Select **Declined** from the *Enrollment* dropdown list.
6. Select a *Decline Reason* from the dropdown list.
7. Enter your Employee ID #, if required.
8. Select the *OK* button.
9. The window returns to the Patient Adherence Preferences. Select the *OK* button.

The WB indicator is removed from the prescriptions on the patient's Profile. Any AutoFill refills that are on the Workbench To Do tab are removed.

The next time the patient's prescriptions are refilled they will be part of the Refill Reminder service, provided the patient's Refill Reminder preference is set to *Default* or *Yes*.

The patient continues to receive Rx Ready calls.

How are prescriptions sorted on the Workbench?

The Workbench To Do tab has its own sort order, separate from the Pending or Completed tab. This allows the To Do tab to be sorted without affecting the workflow status sort order on the Completed tab.

Prescriptions in the To Do tab are sorted in the following order:

- IVR (**T!**) priority prescriptions, if the IVR service is being used
- IVR (**T**) prescriptions, if the IVR service is being used
- AutoFill (**A**) prescriptions
- Priority (**!**) prescriptions
- Any Regular prescriptions that have no priority will be listed last

Within each grouping, the prescriptions are sorted by the *Refill Due* date. The *Time* column on the Workbench defaults to 09:00 for all AutoFill prescriptions.

Why is the prescription missing from the Enrollment window?

You are not able to see the prescription when you try to edit the AutoFill checkbox (at the AutoFill Enrollment window), when the corresponding prescription is open in Rx Detail on any workstation.

If this happens, open the 'Open in Rx Detail' prescriptions on the Workbench In Process tab to see which workstation has the prescription open. Go to the workstation and remove the prescription from Rx Detail.

How do I refresh the profile upon enrollment?

The Patient folder is refreshed upon saving changes in the AutoFill Enrollment window and the **WB** indicator immediately displays on the Profile tab.

If the Enrollment window is invoked from...	The refresh occurs...
Rx action AutoFill from the Profile	upon closing the AutoFill Enrollment window.
Patient folder Preferences tab	upon closing Patient Adherence Preferences window.

Will the AutoFill patient receive Refill Reminder calls?

No. AutoFill overrides the Refill Reminder program. Therefore, any patient that is enrolled in both the AutoFill Service and the Refill Reminder program will no longer receive any Refill Reminder calls.

This applies to all the patient’s prescriptions, not just prescriptions flagged as AutoFill.

Will patients get Rx Ready calls for systemic contraceptives?

Yes, if the IVR service is being used. Currently, systemic contraceptives are excluded from Rx Ready calls. However, a patient who wishes to get an Rx Ready call can enroll a contraceptive prescription in AutoFill and an Rx Ready call will be placed when the prescription is ready for pickup.

If a Hold prescription is flagged for AutoFill, is it placed on the To Do tab?

No. When a new prescription is placed on Hold and flagged for AutoFill, it is not automatically placed on the Workbench To Do tab.

You may, however, manually add the prescription by determining the next refill due date and scheduling it. The prescription will not have an AutoFill “A” indicator in the To Do tab, but it will be activated in AutoFill after the first time the prescription is refilled from Hold.

To schedule a prescription,

1. Select the *Refill* button on the Workbench.
2. In the Refill window, enter the patient’s name.
3. Select the *Schedule* button. The Patient Search window appears.
4. Highlight the patient in the search results and select the *OK* button. The Batch Preferences window appears.
5. Enter the *Scheduled Date* and *Time* at which you would like the prescription(s) to process.
6. Select the *OK* button. The patient profile appears.

7. Highlight the prescription(s) and select the *OK* button. The Batch Profile window appears, displaying the selected prescription(s).
8. Select the *OK* button.

The prescription will be placed in the Workbench Pending tab for the scheduled date.

What happens when I transfer an AutoFill prescription?

When you select an AutoFill prescription to transfer, all of the following occur:

- It is automatically removed from the To Do tab.
- The AutoFill flag is removed.
- The transfer is processed as usual.

If you cancel out of the transfer process, the prescription remains in the Workbench To Do tab with a status of Incomplete and remains enrolled in the AutoFill service.