

IVR Outbound Calling Using PharmaClik Rx User Guide

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IMPORTANT!

DO NOT close PharmaClik Rx IVR Service at the end of the day!



IVR
Interface

IVR requires the PharmaClik Rx **IVR Service** to be running at all times, 24 hours a day, 7 days a week.

This ensures outbound calls are sent during the scheduled hours on Monday to Friday, and on weekends; it also ensures patient-initiated inbound refills are received throughout the business day and after hours. Inbound and outbound calls cannot be handled when the IVR Service is not running.

Introduction

IVR Outbound Calling provides your pharmacy with automated Refill Reminders and Pickup Reminders, enabling improved patient compliance and customer service. As with regular patient-initiated inbound IVR refills, the Outbound Calling module requires the PharmaClik Rx Interface Manager to communicate with PharmaClik Rx.

Pickup Reminders are automated calls by the IVR to inform patients that their prescription order has been filled and is now ready for pickup. When prescriptions are not picked up within a certain number of days, reminder calls are placed to the patients—PharmaClik Rx and the IVR system are doing all the work, instead of pharmacy staff.

Refill Reminders (also called Compliance Reminders) are pro-active telephone calls reminding patients when prescriptions are due for refill; an additional call is placed if a prescription becomes overdue for refill. Upon receiving a Refill Reminder call, patients can choose to refill prescriptions using touch-tone selections on the telephone, or speak to a pharmacy staff member.

Not only do these features reduce the time pharmacy staff members spend on the telephone, but they increase overall efficiency in your pharmacy, reduce the number of never-picked-up prescriptions returned to stock, and improve patient compliance—all of which have a direct impact on your pharmacy's prescription volume and patient retention.

Outbound Calling is activated for the pharmacy as a whole, automatically enrolling patients in program. This means most RETAIL patients with active prescriptions will receive Refill Reminder and Pickup Reminder calls.

★★ IMPORTANT TIPS TO REMEMBER ★★

- To ensure IVR Outbound Calling is directed to the correct patients, it is CRUCIAL to have an accurate **Birth Date** and **Phone #** for each patient. The *Birth Date* is required for Refill Reminders, as a method of verifying the patient's identity. The *Phone #* for the patient's primary address is used for Outbound Calls, unless otherwise specified in Rx Detail or Patient Preferences. Outbound Calls are not sent to telephone numbers that have extensions.
 - Prescriptions must always be scanned though POS, including those with Patient Pays \$0.00 and those being delivered. Scanning the prescription flags it as **Picked Up** in PharmaClik Rx. If prescriptions are not scanned though POS, patients will continue to receive Pickup Reminder calls, and Refill Reminder calls will not be scheduled for the accurate dates.
-

Configuring PharmaClik Rx for Outbound Calls

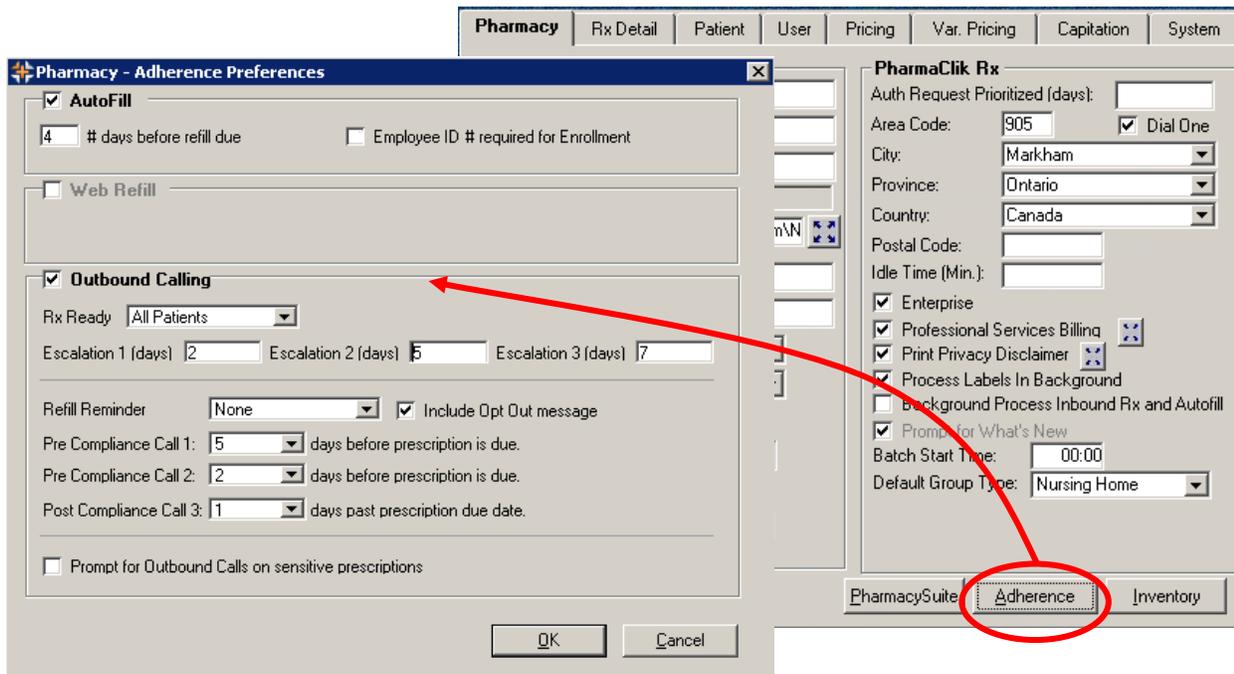
Set your pharmacy's Outbound Calling preferences in PharmaClik Rx in Reminder Preferences in the Pharmacy folder, as shown below.

1. From the Workbench, select **More > Pharmacy**.
2. Select the **Pharmacy** tab.
3. Select the **Adherence** button. The **Pharmacy – 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)
- Outbound Calling

Note Refer to The AutoFill User Guide for steps to set your Pharmacy's preferences for AutoFill and enrolling patients, and their prescriptions, in the program.



Setting Outbound Calling Preferences

Pickup Reminder Outbound Calls are sent in a series of three escalations until the prescription is picked up by the patient.

The day the prescription is filled is considered day one when referring to the number days in the pick-up bin. The first call is placed once a prescription is 'Waiting for Pickup' in the Workbench Completed tab.

The **Rx Ready** preferences are set in the top portion of the Reminder preferences window, in the Outbound Calling section.



To set Outbound Calling preferences:

1. Select the **Outbound Calling checkbox**. This turns the feature ON. A checkmark displays.
2. From **Rx Ready dropdown** list, make your selection:
 - None
 - All Patients
 - Selected Patients
3. Set **Escalation days in** the escalation fields accordingly.

Escalation 1 (days)	The first Pickup Reminder call is placed the day after the prescription is filled.
Escalation 2 (days)	A second Pickup Reminder is placed, if the prescription is still 'Waiting for Pickup'.
Escalation 3 (days)	The third and final Pickup Reminder call occurs, if the prescription is 'Waiting for Pickup'.

SCENARIO

Below is a scenario to further explain how the escalation works.

Let's say that we've set our preferences as follows:

- Escalation 1 (days) 2
- Escalation 2 (days) 5
- Escalation 3 (days) 7

A prescription is filled on Monday. This is Day 1.

On Tuesday, it is still waiting for pickup, so the IVR places a Pickup Reminder call to the patient. This is Day 2. Escalation 1 has taken place.

On Thursday, the prescription has still not been picked up, so the IVR places a second Pickup Reminder call to the patient. This is Day 4. Escalation 2 has taken place.

On Friday, the patient picks up the prescription. No further Pickup Reminders are made for this prescription.

Note When multiple prescriptions for patients in the same household are 'Waiting for Pickup', the calls are grouped by telephone number and one call is placed for all members in the household (i.e. all patients with the same telephone number).

Pickup Reminder Exemptions

Pickup Reminders are **NOT CREATED** for the following types of patients:

- Non-retail patients and prescriptions
- Patients who are Deceased, Inactive, Obsolete or Hospitalized (as set in the *Status* field, located in the main tab of the Patient folder).
- Patients who have opted out of Pickup Reminders (as set in Patient Outbound Call Preferences).

Pickup Reminders are **NOT CREATED** for the following types of prescriptions:

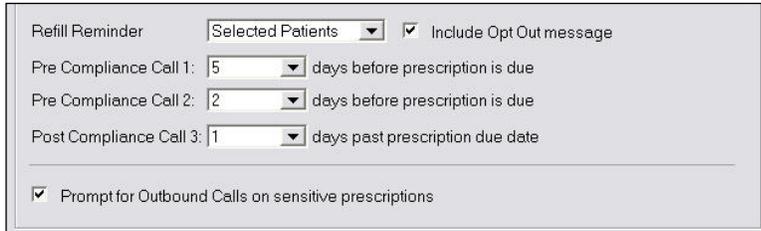
- Dosett or Dispill prescriptions
- Prescriptions that are 'Waiting for Delivery'
- Prescriptions that are classified as sensitive (refer to Outbound Calls for Sensitive Prescriptions).

Setting Refill Reminders Preferences

Refill Reminders are sent for prescriptions with refills, and prescriptions for maintenance medications (calls are made for maintenance prescriptions even if there are no repeats remaining on the prescriptions).

When Outbound Calling is in place, regular PharmaClik Rx refill reminders are not used.

The **Refill Reminder** preferences are set in the bottom portion of the Reminder preferences window, in the Outbound Calling section.



To set **Refill Reminder** preferences:

- From Refill Reminder dropdown list, select one option:
 - None
 - All Patients
 - Selected Patients
- Select **Include Opt Out message** checkbox to turn ON option. A checkmark displays indicating the option is enabled.

TIP

When turned ON, the first call a patient receives for a refill remind, the patient is given the option to opt-out of refill reminders. There are two different compliance scripts: one for when this preference is ON, one for when the preference is turned OFF.

- Set Compliance preferences. A maximum of three IVR Refill Reminders are sent:

Pre Compliance Call 1	<ul style="list-style-type: none"> The initial Refill Reminder call occurs before the prescription is due for refill. Select from 0-14 days, or select Do not call.
Pre Compliance Call 2	<ul style="list-style-type: none"> A second call occurs the day before the refill is due. Select from 0-14 days, or select Do not call.
Post Compliance Call 3	<ul style="list-style-type: none"> The third and final call is sent if the prescription is not refilled by the due date. This call occurs when the prescription is one day overdue (i.e. the day after the due date). Select from 0-14 days, or select Do not call.

The date a prescription is due for refill is calculated from the date the prescription is Picked Up; if the prescription does not have a Picked Up date, the due date is calculated from the prescription's Fill Date.

SCENARIO

Below is a scenario to further explain how the escalation works.

Let's say that we've set our preferences as follows:

- Pre Compliance Call: 7 days before the prescription is due.
- Pre Compliance Call 2: 1 days before the prescription is due.
- Post Compliance Call 3: 1 days past prescription due date.

A prescription is filled on July 30 for a 30-day supply. The prescription is picked up on August 1; it is scanned through POS and the Rx# becomes 'Picked Up' in PharmaClik Rx.

The Picked Up date is considered Day 1 in the prescription's days supply; the prescription has a 30-day supply, therefore it will be due for refill on August 30.

The Refill Reminder calls are scheduled as follows:

- August 23 (7 days before the due date)
- August 29 (1 day before the due date)
- August 31 (1 day after the due date)

When there are multiple refill reminder calls for the same household, the calls are grouped by patient and one call is placed per patient; all of the patient's refill-due prescriptions are included in the same call. If the patient chooses to refill prescriptions over the IVR, refill requests are created on the Workbench To Do tab for all refill-due prescriptions.

4. Check **Prompt for Outbound on sensitive prescriptions** to turn ON the option. A checkmark displays indicating the option is enabled.

TIP

When turned ON, a message prompt displays when a prescription is filled for sensitive prescriptions, such as oral contraceptives. Refer to **Outbound Calls for Sensitive Prescriptions** subsection of **Prescriptions & Outbound Calling**.

IVR Refill Reminder Exemptions

IVR Refill Reminders are **NOT CREATED** for the following types of patients:

- Non-retail patients and prescriptions
- Patients who are Deceased, Inactive, Obsolete or Hospitalized (as set in the *Status* field, located in the main tab of the Patient folder).

IVR Refill Reminders are **NOT CREATED** for the following types of prescriptions:

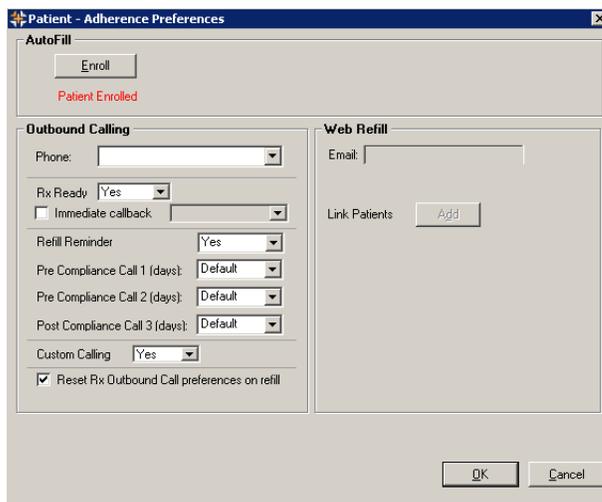
- Narcotics
- Dosett or Dispill prescriptions
- Inactive, Discontinued or Suspended prescriptions
- Prescriptions with no repeats, unless they are for maintenance medications
- Prescriptions that are classified as sensitive (refer to Outbound Calls for Sensitive Prescriptions)
- Patients who have opted out of Refill Reminders (as set in Patient Outbound Call Preferences)

Patient Outbound Call Preferences

Patient Outbound Call Preferences provide the ability to remove a patient from the Refill Reminder and/or Pickup Reminder service, as well as set a default phone number for the patient's Outbound Calls.

To access Patient Outbound Call Preferences:

1. Open the patient's folder.
2. Select the **Preferences** tab.
3. Select the **Adherence** button. The **Patient – Adherence Preferences** window opens.



Changing the Patient's Outbound Phone

By default, Outbound Calls are sent to the Phone number for the patient's primary address. If the patient prefers to receive calls at a different number, change the phone number in the **Call Details** box by making a selection from the dropdown list.

The dropdown list contains telephone numbers from the various Address tabs in the patient's folder (fax numbers are not included, nor are phone numbers with extensions).

If the preferred telephone number is not in the list:

1. Select **Cancel** or **OK** to close the Adherence Preferences window.
2. Select the main tab in the Patient folder.
3. Select the **Address** tab to which the new phone number will be added.
4. Enter the number in the **Phone** or **Mobile Phone** field for that tab.
5. Select the **Save** button.
6. From the **Preferences** tab, select the Adherence button.
7. Select the **Outbound Call** button.
8. Select the new telephone number from the **Phone** dropdown list in the Call Details box.
9. Select the **OK** button to save changes and close the window.

Immediate Pickup Reminders

If a patient prefers to receive Pickup Reminders as soon as prescriptions are ready, the patient can be flagged for immediate callback and an immediate callback number can be specified. Pickup Reminders are sent shortly after the prescriptions become 'Waiting for Pickup'. Patients who receive an immediate Pickup Reminder, will receive the Escalation 1 call as usual if the prescription is still in the pickup bin the next day.

Example:

A patient works in an office building near the pharmacy and usually picks up prescriptions at lunch or after work. She can request to receive Pickup Reminders on her cell phone as soon as the prescriptions are ready. She now knows exactly when her prescriptions are ready and can plan a return trip to the pharmacy accordingly.

To set a patient for immediate calls:

1. Open the patient's folder.
2. Select the *Preferences* tab.
3. Select the *Outbound Call* button.
4. Turn ON the *Immediate Callback* checkbox.
5. The *Immediate Callback* dropdown list becomes enabled. Select the preferred telephone number from the list.

TIP If the telephone number is not in the list, it must be added to one of the address tabs in the Patient's folder.

6. Select the *OK* button to save changes and close the window.

Resetting Call Preferences on Refill

Outbound Call Preferences can be set at patient level and prescription level. Turning ON the *Reset Rx Outbound Call preferences on Refill* flag ensures all prescription overrides are reset to match the patient preferences upon refill. When this flag is OFF, prescription overrides are carried over to the next refill.

Opting Out of Outbound Calls

Patients can choose to opt out of Refill Reminders, Pickup Reminders or both. Patients are given a one-time automated option to opt out of Refill Reminders, but can only be removed from Pickup Reminders upon request.

Removing a Patient from Refill Reminders

The first time a patient receives a Refill Reminder call from your pharmacy, he is given the option to opt out of the Refill Reminder program. A message similar to the following plays for the patient:

*Hello. I am calling from XXX pharmacy to let you know our records indicate a member of this household has a prescription that is due for refill. Please choose from the following options: If you want to refill now, select 1. **Select 2** to speak to a pharmacy staff member. If you have received this message in error, please **select 3**. You can **select 4** to remove your number from this service.*

If the patient selects 4, the *Refill Reminder Outbound Call* field is set to NO in the patient's Outbound Call Preferences. Once removed, the patient no longer receives any IVR Refill Reminders – all existing Refill Reminders are deleted for this and other prescriptions, and no further Refill Reminders are created. Opting out over the telephone also creates an entry in the patient's History, indicating the patient opted out of Refill Reminders.

TIP To view the patient's History, open the patient's folder and then select the *History* tab.

The patient only receives the automated option once. If the patient chooses to be removed from Refill Reminders at a later date, he must speak directly to a pharmacy staff member and the patient's preferences must be updated manually.

To remove a patient from Refill Reminders:

1. Open the patient's folder.
2. Select the *Preferences* tab.
3. Select the *Adherence* button.
4. Select **No** from the *Refill Reminder* dropdown list.
5. Select the **OK** button to save changes and close the window.
6. All existing IVR Refill Reminder activities are automatically removed.

Removing a Patient from Pickup Reminders

If a patient requests to be removed from Pickup Reminders, update the *Pickup Reminder Outbound Call* field in Patient Outbound Call Preferences. Once removed, the patient will no longer receive Pickup Reminders.

To remove a patient from IVR Refill Reminders:

1. Open the patient's folder.
2. Select the *Preferences* tab.
3. Select the *Adherence* button.
4. Select **No** from the *Rx Ready* dropdown list.
5. Select the *OK* button to save changes and close the window. All existing Pickup Reminder activities are automatically removed.

IVR Doctor Refill Authorization

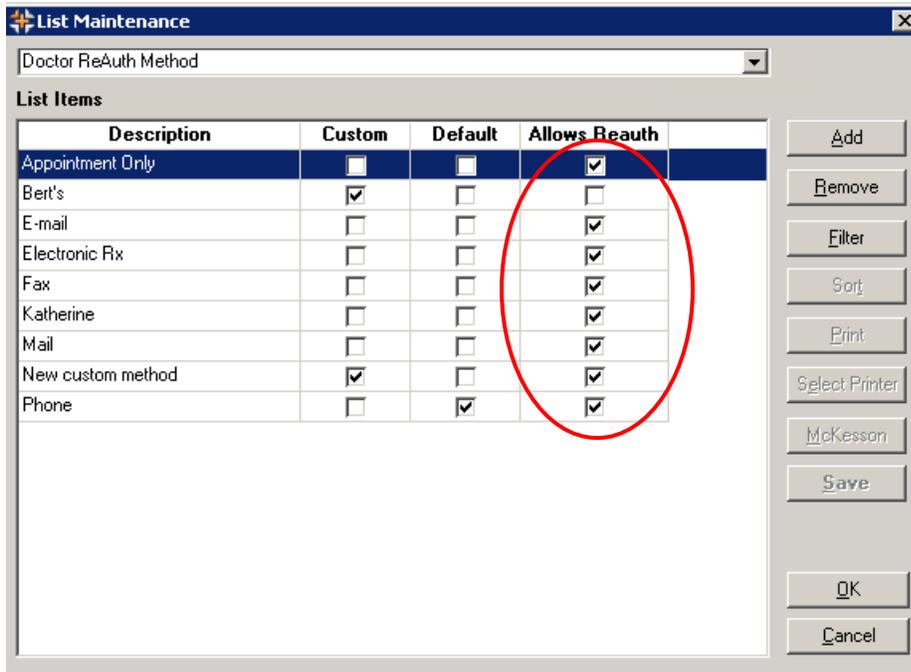
The pharmacy often contacts a doctor in order to reauthorize prescriptions and while some doctors accept prescription reauthorizations by telephone, fax, or email, others prefer to see the patient in person.

The doctor contact information displays in the Communication field on the Main tab of the Doctor folder.

When a patient calls into the pharmacy to renew a prescription through the automated telephone system (IVR), if the prescription has zero (0) refills, the IVR plays an automated message based on preferences set in PharmaClik Rx.

These preferences are set in the **Doctor ReAuth Method** list in List Maintenance.

The default settings, as shown below, cannot be changed.



The screenshot shows a window titled "List Maintenance" with a dropdown menu set to "Doctor ReAuth Method". Below the dropdown is a table with the following data:

Description	Custom	Default	Allows Reauth
Appointment Only	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Bert's	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
E-mail	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Electronic Rx	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Fax	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Katherine	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Mail	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
New custom method	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Phone	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

To the right of the table are several buttons: Add, Remove, Filter, Sort, Print, Select Printer, McKesson, Save, OK, and Cancel. A red circle highlights the "Allows Reauth" column in the table.

Doctor Preference	Sample Message	Prescription
DOES NOT allow refill authorizations	<p>I'm sorry. There are no refills/too soon/expired[‡] on this prescription. Our records indicate that you must contact your doctor regarding this prescription.</p> <p>If you would like to speak to someone in the pharmacy, select 1, or if you would like to enter a different prescription number, select 2. Or, if you are finished with your prescription refill, select 3.</p>	IS NOT added to the Workbench To Do tab.
Allows refill authorizations	<p>I'm sorry. There are no refills/too soon/expired[‡] on this prescription. Refilling this prescription requires authorization from your doctor.</p> <p>If you would like the pharmacy to contract your doctor, select 1. If you are going to contact your doctor, select 2. If you would like to speak to someone in the pharmacy, select 3, or if you would like to enter a different prescription, select 4.</p>	is added to the Workbench To Do tab.

[‡]The outgoing message refers to the status of the prescription. It is one of the following: a) no refills, b) too soon, or c) expired.

Prescriptions & Outbound Calling

Rx Outbound Call Preferences contains fields similar to Patient Outbound Call Preferences, providing a prescription-level override to the pharmacy and/or patient defaults.

Pharmacy staff should also be aware that Outbound Calling has an impact on delivery prescriptions. Staff must also be diligent about flagging delivery prescriptions as such in Rx Detail, ensuring Pickup Reminders are not sent to patients who are receiving deliveries.

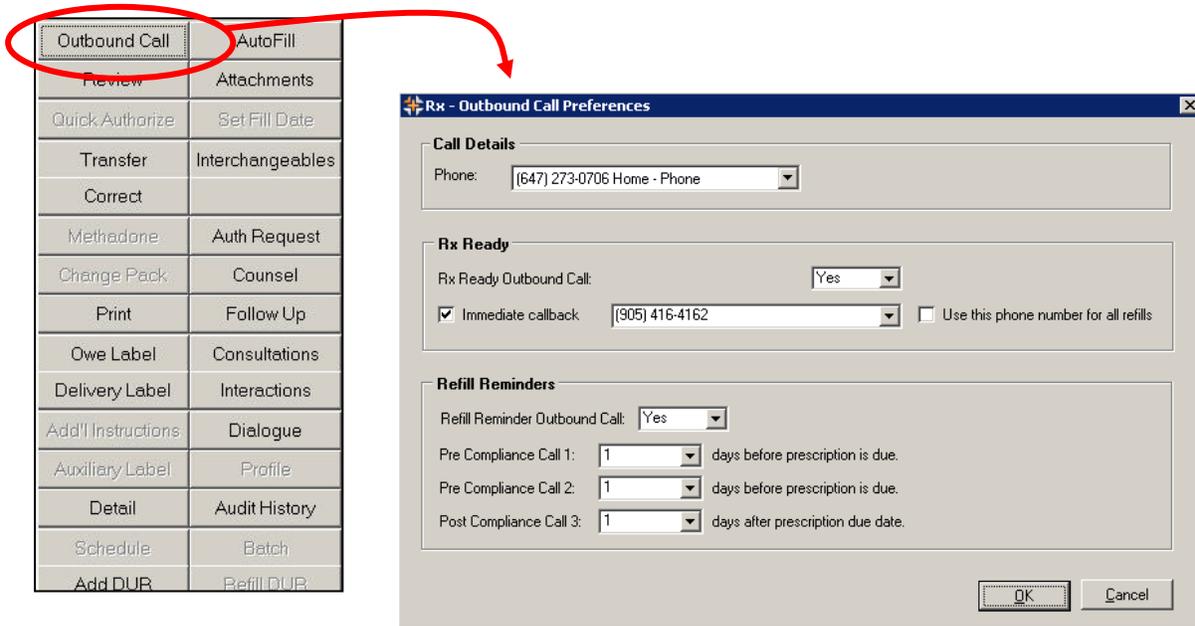
Rx Outbound Call Preferences

Rx Outbound Call Preferences default to the same values as the patient's Outbound Call Preferences. They allow an Outbound Call telephone number to be set for a specific prescription, the prescription can be flagged for an immediate Pickup Reminder, and outbound calling can be turned off for a sensitive prescription (refer to [Outbound Calls for Sensitive Prescriptions](#) for details).

Rx Outbound Call Preferences can be opened from Rx Detail, the Workbench or the patient's Profile, using the Rx button. The following steps explain how to open Rx Outbound Call Preferences from Rx Detail; follow similar steps from the Profile and Workbench.

To open Rx Outbound Call Preferences from Rx Detail:

1. The prescription must be open in Rx Detail.
2. Select the **Rx** button.
3. Select **Outbound Call**. The Rx – Outbound Call Preferences window opens.



Setting an Outbound Call Phone Number for a Prescription

Outbound Calls are sent to the patient's default telephone number, as set in Patient Outbound Call Preferences. If the patient prefers to receive calls for a specific prescription at a different number, change the phone number in the *Call Details* box by making a selection from the dropdown list.

The dropdown list contains telephone numbers from the various Address tabs in the patient's folder (fax numbers are not included, nor are telephone numbers with extensions). Follow these steps if the preferred telephone number is not in the list:

1. Select *Cancel* or *OK* to close the Rx Outbound Call Preferences window.
2. Open the patient's folder as usual.
3. Select the main tab in the Patient folder.
4. Select the Address tab to which the new phone number will be added.
5. Enter the number in the *Phone* or *Alt Phone* field for that tab.
6. Select the *Save* or *OK* button (the available button differs depending upon how the folder was accessed).
7. Re-open Rx Outbound Call Preferences from **Rx button > Outbound Call**.
8. Select the new telephone number from the *Phone* dropdown list in the *Call Details* box.
9. Select the *OK* button to save changes and close the window.

Immediate Pickup Reminders

If a patient wishes to receive a pickup reminder as soon the prescription is ready, flag the prescription for immediate callback and specify an immediate callback telephone number. Pickup Reminders are sent shortly after the prescription becomes 'Waiting for Pickup'.

Example:

A patient is shopping in the mall and drops off a prescription at your pharmacy. Instead of waiting in the pharmacy, she wants to receive a call on her cell phone when the prescription is ready, at which time she will return to pick up the prescription.

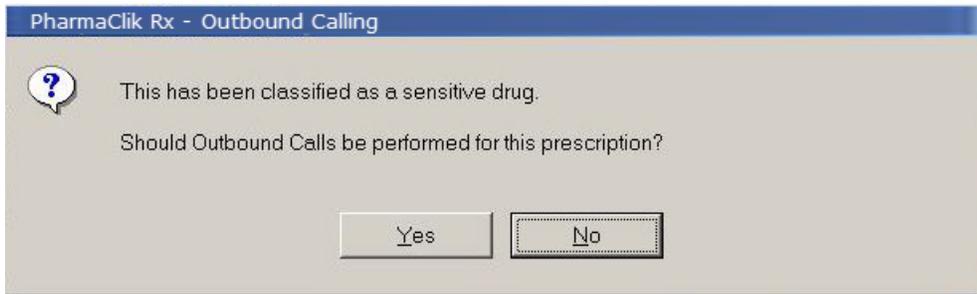
To set a prescription for an immediate call:

1. When the prescription is open in Rx Detail at the time of filling, select the *Rx* button.
2. Select *Outbound Call*.
3. Turn ON the *Immediate Callback* checkbox.
4. The *Immediate Callback* dropdown list becomes enabled. Select the preferred telephone number from the list.
TIP If the telephone number is not in the list, it must be added to one of the address tabs in the Patient's folder.
5. Select the *OK* button to save changes and close the window.
6. Continue to fill the prescription as usual.

Outbound Calls for Sensitive Prescriptions

Certain drugs are deemed sensitive, in the sense that a patient may be uncomfortable receiving Outbound Calls for that specific prescription (e.g. Viagra, oral contraceptives).

The following prompt appears in Rx Detail the first time a prescription is filled for a sensitive drug, after Outbound Calling is enabled for the pharmacy.



Select Yes	Select No
<p>If the patient will not object to receiving Outbound Calls for the drug – ask the patient or use your best professional judgment (e.g. a teenager may not wish to receive calls for oral contraceptives, but such calls are most likely acceptable for an adult).</p> <p>When <i>Yes</i> is selected, the <i>Pickup Reminder Outbound Call</i> and <i>Refill Reminder Outbound Call</i> fields in Rx Outbound Call Preferences are both set to 'Yes'.</p> <p>Outbound Calls will be created for the prescription and the Sensitive Drug prompt does not reappear.</p>	<p>To turn OFF Outbound Calling for this prescription, as well as any future refills and reauthorizations.</p> <p>The <i>Pickup Reminder Outbound Call</i> and <i>Refill Reminder Outbound Call</i> fields in Rx Outbound Call Preferences are both set to 'No'.</p>

Manually Removing a Prescription

As mentioned above, the Sensitive Drug prompt does not reappear on future fills and reauthorizations. If a patient requests no Outbound Calls for a prescription, other than those drugs deemed sensitive, modify the prescription to turn off Pickup Reminders and Refill Reminders. This can be done from Rx Detail, the Workbench or the patient's Profile, using the Rx button. The following steps explain how to modify Rx Outbound Calling Preferences from the Profile.

To manually remove a prescription from Outbound Calls:

1. Open the patient's folder.
2. Select the *Profile* tab.
3. Highlight the prescription on the Profile.
4. Select the *Rx* button.
5. Select *Outbound Call*.
6. Select **No** from the *Pickup Reminder* dropdown list.
7. Select **No** from the *Refill Reminder* dropdown list.
8. Select the *OK* button to save changes and close the window.

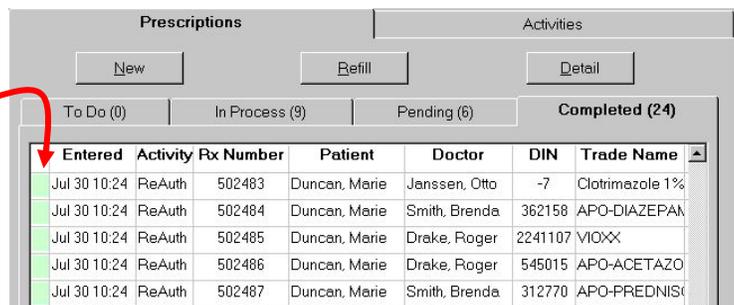
Delivery Prescriptions

When a prescription is to be delivered, it must be flagged as *Delivery* in Rx Detail to ensure it is appropriately marked as 'Waiting for Delivery' on the Workbench. If the prescription is not flagged for delivery, it becomes 'Waiting for Pickup' and Pick Reminder calls will be sent to the patient.

A 'Waiting for Pickup' prescription can be changed to 'Waiting for Delivery' by amending the prescription and turning ON the *Delivery* flag in the main tab Rx Detail **OR** by modifying the workflow status from the Workbench Completed tab.

To change a prescription's workflow status to 'Waiting for Delivery':

1. Go the Workbench.
2. Select the *Completed* tab.
3. To change one prescription:
 - Use the mouse to right-click on the prescription's *Priority* column (i.e. the colour-coded column).
4. To change multiple prescriptions:
 - Highlight all prescriptions to be changed, and then use the mouse to right-click on the *Priority* column for a highlighted prescription.



Entered		Activity	Rx Number	Patient	Doctor	DIN	Trade Name
Jul 30 10:24	ReAuth	502483	Duncan, Marie	Janssen, Otto	-7	Clotrimazole 1%	
Jul 30 10:24	ReAuth	502484	Duncan, Marie	Smith, Brenda	362158	APO-DIAZEPAN	
Jul 30 10:24	ReAuth	502485	Duncan, Marie	Drake, Roger	2241107	VIOXX	
Jul 30 10:24	ReAuth	502486	Duncan, Marie	Drake, Roger	545015	APO-ACETAZO	
Jul 30 10:24	ReAuth	502487	Duncan, Marie	Smith, Brenda	312770	APO-PREDNIS	

The Change Workflow Status menu appears.

5. Select *Change to 'Waiting for Delivery'*. The Change Workflow Status window appears.
6. Review all prescriptions listed in the window and deselect any prescriptions that should not be assigned 'Waiting for Delivery'.
7. Select the *OK* button. The screen returns to the Completed tab and the selected prescriptions are now 'Waiting for Delivery'.

Outbound Calling Activities

Outbound Calls are listed in the Activities To Do tab for their scheduled dates. Once a call is sent, it moves to the Activities Completed tab. If appropriate, an activity for the next escalation is scheduled at the same time (e.g. the next Pickup Reminder is scheduled after the first Pickup Reminder call is successful).

Scheduled activities are automatically removed once the prescription is picked up or refilled. Future Pickup Reminders are deleted once the prescription is picked up; Refill Reminders are deleted once a prescription is refilled.

To access Activities:

1. Select the *Workbench* button.
2. Select the *Activities* tab.

The **User** is o_c, which stands for Outbound Call.

The **Activity** is *IVR Refill Reminder* or *IVR Rx Ready*.

Outbound Calls are identified by a **T** in the **Priority** column.

Prescriptions		Activities (43)		Messages
New		Done		Process
To Do (112)		In Process (0)		Completed (0)
Scheduled	User	Activity		
T Mar 21, 2015 10:15	o_c	IVR Rx Ready	Rx: 7526294, ABC Test, (9...	
T Mar 19, 2015 09:20	o_c	IVR Rx Ready	Rx: 7526293, JAMES MCKE...	
T Mar 19, 2015 09:20	o_c	IVR Rx Ready	Rx: 7526291, JAMES MCKE...	
T Feb 11, 2015 08:20	o_c	IVR Rx Ready	Rx: 7526283, AASDAS TEST	
T Jul 27, 2014 10:47	o_c	IVR Rx Ready	Rx: 7526277, WALLY WINTI	
T Jun 25, 2014 11:41	o_c	IVR Rx Ready	Rx: 7526268, WALLY WINTI	
T Dec 07, 2013 15:40	o_c	IVR Rx Ready	Rx: 7526195, WALLY WINTI	
T Dec 06, 2013 11:10	o_c	IVR Rx Ready	Rx: 7526191, WALLY WINTI	
T Dec 05, 2013 13:20	o_c	IVR Rx Ready	Rx: 7526186, JAMES MCKE...	
T Dec 05, 2013 09:50	o_c	IVR Rx Ready	Rx: 7526178, WALLY WINTI	
T Dec 05, 2013 09:20	o_c	IVR Rx Ready	Rx: 7526175, WALLY WINTI	

Comment indicates the patient's name, telephone number, drug trade name, and Rx#.

Pickup Reminders indicate how long the prescription has been waiting for pickup (e.g. Waiting for Pickup since: Aug 11, 2007).

IVR Refill Reminders display the prescription's Last Fill Date and the Refill Due Date.

Finding a Patient's Refill Reminder Calls

When a patient receives a Refill Reminder call, he can refill all the prescriptions over the IVR using touch-tone selections, or chose to speak to a pharmacy staff member. If the patient speaks to a pharmacy staff member, he may ask which prescriptions are due for refill (prescription details are not provided over the IVR). You can find this information in the Activities To Do and Completed tabs; filter on the patient's name to see today's Outbound Calls for that patient.

To find prescriptions that are due for a refill:

1. Select the *Workbench* button.
2. Select the *Activities* tab.
3. Select the *Filter* button
4. Enter the patient's last name in the Filter window.
5. Select the *OK* button.

Today's activities for the patient are listed in the To Do and Completed tabs. Refill Reminders are identified by IVR Refill Reminder in the *Activity* column; each prescription has its own IVR Refill Reminder activity.

TIP To view the patient's Outbound Calls for the current week, select the *Calendar* button at the bottom of the tab. The Workbench Calendar window opens; select the **7** button (*By Week*), and then select the *OK* button to return to Activities. The date at the bottom of the tab shows 'Week of Mmm dd, yyyy'.

Removing an Outbound Call Activity

When Outbound Call activities are deleted from the Activities tab, patients will not be called for those prescriptions. IVR Refill Reminders should be deleted if a patient speaks to a pharmacy staff member and chooses not to refill a prescription.

Example:

A patient receives a Refill Reminder call and chooses to speak to a pharmacy staff member to ask which prescriptions are due. It turns out that three prescriptions are due for a refill, but the patient only wants two prescriptions refilled. The user must delete the next scheduled Refill Reminder activity for that patient to ensure another Refill Reminder call does not occur for the prescription. (Scheduled Refill Reminder activities for the two refilled prescriptions are automatically deleted.)

To delete Refill Reminders for prescriptions that are not being refilled:

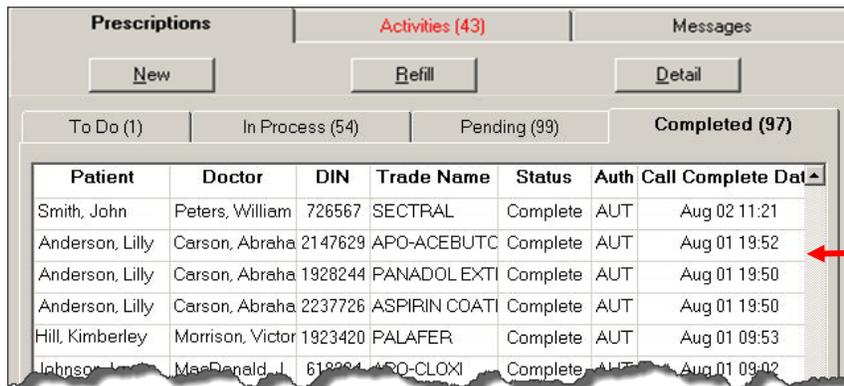
1. Select the *Workbench* button.
2. Select the *Activities* tab.
3. Select the *To Do* tab.
4. Select the *Filter* button
5. Enter the patient's last name in the Filter window.
6. Select the *OK* button.
7. Select the *Calendar* button at the bottom of the Activities tab.
8. The Workbench Calendar window opens; select the **31** button to view upcoming Refill Reminders for the patient.
9. Select the *OK* button to return to Activities. The date at the bottom of the tab shows 'Month of Mmm dd, yyyy'.
10. On the To Do tab, find the next IVR Refill Reminder for the prescription(s); if the current date is close to month end, you may need to view the next month as well. Highlight the IVR Refill Reminder(s) to be deleted.
11. Select the *Delete* button. A prompt confirms if the activities should be deleted.
12. Select the *Yes* button.

The Workbench

Prescriptions that are Waiting for Pickup

Completed prescriptions are automatically assigned workflow status 'Waiting for Pickup' unless they are flagged for Delivery, in which case they are 'Waiting for Delivery'. 'Waiting for Pickup' prescriptions are continuously carried over to the next day's Completed tab until they are scanned through POS and become 'Picked Up'.

A *Call Complete Date* column on the Workbench Completed tab indicates the last date and time a successful Pickup Reminder call was sent to the patient.



Prescriptions						
		Activities (43)		Messages		
New		Refill		Detail		
To Do (1)		In Process (54)		Pending (99)		Completed (97)
Patient	Doctor	DIN	Trade Name	Status	Auth	Call Complete Date
Smith, John	Peters, William	726567	SECTRAL	Complete	AUT	Aug 02 11:21
Anderson, Lilly	Carson, Abraha	2147629	APO-ACEBUTC	Complete	AUT	Aug 01 19:52
Anderson, Lilly	Carson, Abraha	1928244	PANADOLEXTI	Complete	AUT	Aug 01 19:50
Anderson, Lilly	Carson, Abraha	2237726	ASPIRIN COATI	Complete	AUT	Aug 01 19:50
Hill, Kimberley	Morrison, Victor	1923420	PALAFER	Complete	AUT	Aug 01 09:53
Johnson, Lisa	MacDonald, J.	618884	APO-CLOXI	Complete	AUT	Aug 01 09:02

Inbound Refill Requests

Inbound refill requests initiated through IVR Refill Reminder calls are displayed on the Workbench To Do tab in the same manner as regular IVR inbound refills. They should be processed in the regular manner.

Questions & Answers

During what hours are Outbound Calls placed?

The call parameters for outbound calls are set on the IVR device. The calls are placed as follows:

Monday to Friday	9:00 am – 7:00 pm
Saturday	10:00 am – 6:00 pm
Sunday	NO CALLS

When a call is scheduled for Sunday, it will be carried over to Monday. Statutory holidays use the regular call parameters as indicated above.

What happens when there is no answer or the line is busy?

The IVR attempts to contact the patient up to a maximum of three times per escalation. When there is no answer, the calls are attempted in 120 minute intervals; when the IVR receives a busy signal, the calls are attempted in 10 minute intervals.

Calls roll over to the next day if all three attempts cannot be made on the same day (e.g. two attempts were made, but the third cannot be called since it is after hours; the third call is placed the next day).

If the call is unsuccessful after the third attempt, an activity is scheduled for the next escalation.

What happens if voice mail picks up?

The call is considered successful and a brief message is left on the patient's voice mail indicating the reason for the call. If the patient does not respond, either by picking up a waiting prescription, or by calling the pharmacy to request refills, the Outbound Call is escalated to the next level as usual.

Which patients and prescriptions are exempt from Outbound Calls?

Outbound Calls are only sent to active RETAIL patients; they are not sent to nursing home or other types of non-retail patients. Patients who choose to opt-out are also exempt from IVR Refill Reminders, Pickup Reminders, or both.

Patients with one of following statuses set in the main tab of the Patient folder do not receive Outbound Calls: Deceased, Hospitalized, Inactive, or Obsolete.

The following types of prescriptions are exempt from Outbound Calls:

- Inactive, Discontinued, or Suspended prescriptions
- Dispill or Dosett (i.e. prescriptions that are already on a compliance schedule)
- Non-retail prescriptions
- Prescriptions that have been classified as sensitive
- IVR Refill Reminders are not sent for Narcotics
- Pickup Reminders are not sent for prescriptions that are 'Waiting for Delivery', or for prescriptions that do not have a Workflow status

What are maintenance medications?

Maintenance medications are classified as:

(a) Any prescription where the days supply is greater than or equal to 30.

OR

(b) Any prescription where the days supply is less than 30 AND the drug's therapeutic class is one of the following:

- | | | |
|---------------------------|-------------------------------------|---------------------------|
| ▪ Androgens | ▪ Lipotropics | ▪ Systemic Contraceptives |
| ▪ Anticoagulants | ▪ Progesterone | ▪ Vasodilators Coronary |
| ▪ Folic Acid Preparations | ▪ Psychostimulants-AntideSelectants | ▪ Vasodilators Peripheral |

When are Pickup Reminders scheduled?

An Escalation 1 Pickup Reminder is scheduled as soon as the prescription becomes 'Waiting for Pickup' on the Workbench Completed tab. The activity for Escalation 2 is scheduled after the Escalation 1 call is successful. The Escalation 3 activity is scheduled once the second escalation call is successful.

When a prescription is flagged for immediate callback, the immediate Pickup Reminder is scheduled AND called as soon as the prescription becomes 'Waiting for Pickup'. The Escalation 1 Pickup Reminder is scheduled AFTER the immediate call is successful.

Any existing Pickup Reminder activities are automatically deleted as soon as the prescription is picked up, ensuring the patient does not receive further Pickup Reminder calls for that prescription.

When are Refill Reminders scheduled?

The first Refill Reminder activity is created as soon as the prescription becomes Complete – it is scheduled for 7 days prior to the end of the prescription's days supply. This activity is automatically rescheduled as soon as the prescription is Picked Up, ensuring the days supply is calculated from the date the prescription was picked up instead of the prescription's Fill Date.

Upon receiving the first Refill Reminder call, the patient has the option to refill all prescriptions included in the call or speak with a pharmacy staff member. If refill requests are not placed, the Escalation 2 Refill Reminder call is then scheduled for the day prior to the refill due date.

If the prescriptions are not refilled with the second Refill Reminder call, the Escalation 3 call is immediately scheduled for the day after the refill due date.

Any existing Refill Reminder activities are automatically deleted as soon as the prescription is refilled, ensuring the patient does not receive further Refill Reminder calls for that prescription.

Are Pickup Reminders created for prescriptions with Owe Amounts?

Pickup Reminders are not scheduled if the Owe Amount AT THE TIME OF FILLING is for the prescription's full quantity (i.e. no medication will be provided to the patient). Refill Reminders are still scheduled.

If some medication is being provided at the time of filling (Owe Amount < Rx Qty), a Pickup Reminder is created since the partial prescription is ready.

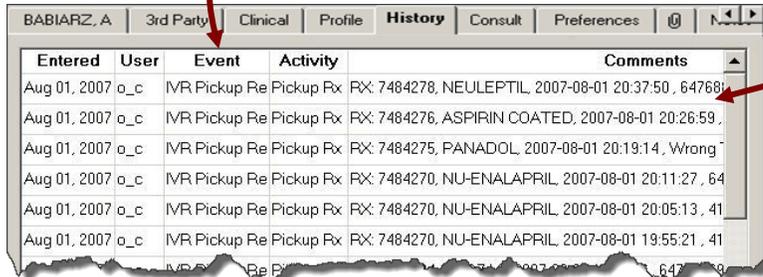
If the Owe Amount is modified AFTER filling the prescription, the Pickup Reminders is not changed. If a Pickup Reminder should not be called the following day, the user must DELETE the prescription's Pickup Reminder from the Activities To Do tab.

Are patient Outbound Call records tracked in PharmaClik Rx?

Completed Outbound Calls are listed in the Activities Completed tab. Outbound Call attempts for a specific patient can be viewed in the patient’s History tab. Follow these steps to view Outbound Calls in Patient History:

1. Open the patient’s folder.
2. Select the *History* tab.
3. Select the *Filter* button
4. Enter **O_C** in the Filter window (all Outbound Calls have the User o_c).
5. Select the *OK* button. The filtered tab shows all Outbound Calls for the patient. Remove the filter when you are finished.
6. Select the *Filter* button, select the DELETE key on the keyboard, then select the *OK* button.

Event and Activity indicate the type of Outbound Call.



Entered	User	Event	Activity	Comments
Aug 01, 2007	o_c	IVR Pickup Re	Pickup Rx	RX: 7484278, NEULEPTIL, 2007-08-01 20:37:50, 64768
Aug 01, 2007	o_c	IVR Pickup Re	Pickup Rx	RX: 7484276, ASPIRIN COATED, 2007-08-01 20:26:59,
Aug 01, 2007	o_c	IVR Pickup Re	Pickup Rx	RX: 7484275, PANADOL, 2007-08-01 20:19:14, Wrong
Aug 01, 2007	o_c	IVR Pickup Re	Pickup Rx	RX: 7484270, NU-ENALAPRIL, 2007-08-01 20:11:27, 64
Aug 01, 2007	o_c	IVR Pickup Re	Pickup Rx	RX: 7484270, NU-ENALAPRIL, 2007-08-01 20:05:13, 41
Aug 01, 2007	o_c	IVR Pickup Re	Pickup Rx	RX: 7484270, NU-ENALAPRIL, 2007-08-01 19:55:21, 41

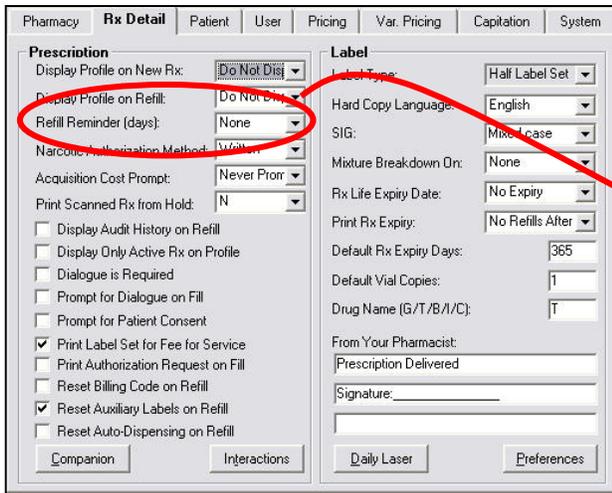
Comments displays the Rx#, drug trade name, date and time of the call, telephone number called, and any interactive touch-tone responses from the patient (e.g. Wrong Telephone #, Already Picked Up).

Appendix

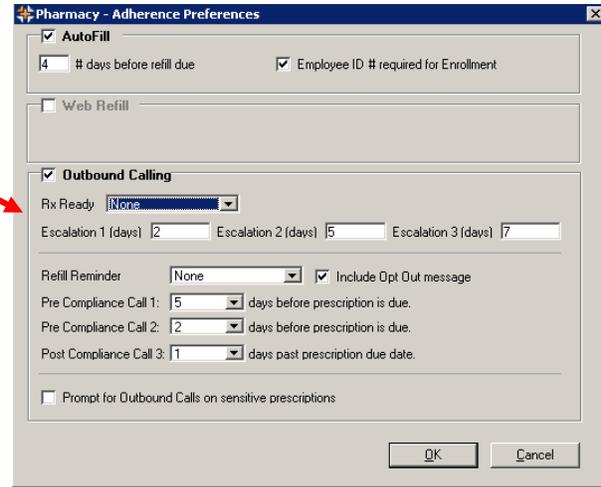
When the IVR Outbound Call module is activated, settings are automatically set in the Pharmacy and Patient. The settings are described below and in the following pages.

Pharmacy Preferences

Rx Detail tab



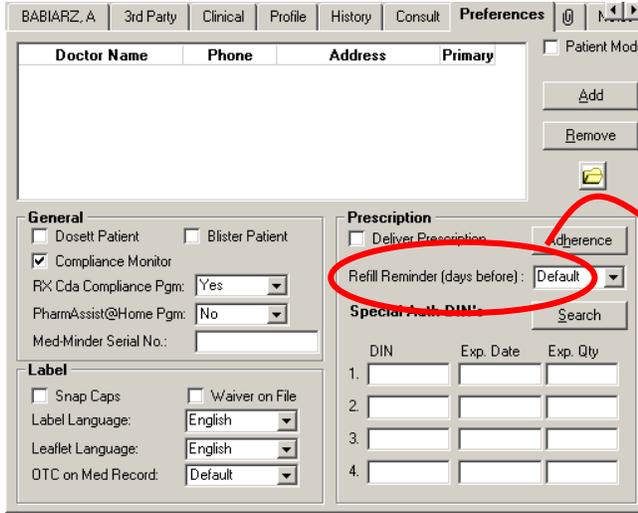
Outbound Call Preferences window



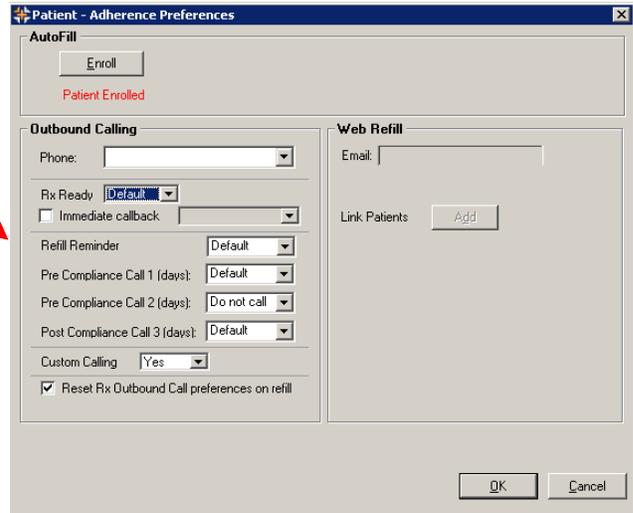
Refill Reminder (days)	Pharmacy – Reminder Preferences in Outbound Calling Groupbox			
	Refill Reminder	Compliance Calls		
		Pre Compliance Call 1:	Pre Compliance Call 2:	Post Compliance Call 3:
Default None	None	Do not call	Do not call	Do not call
0 (zeros)	All Patients	0	Do not call	Do not call
Any number from the dropdown list: 1–14 inclusive	All Patients	# selected	Do not call	Do not call
-1	All Patients	1	Do not call	1
-2	All Patients	2	Do not call	2
Any negative number	All Patients	Corresponding positive number	Do not call	Do not call

Patient Folder

Preferences Tab



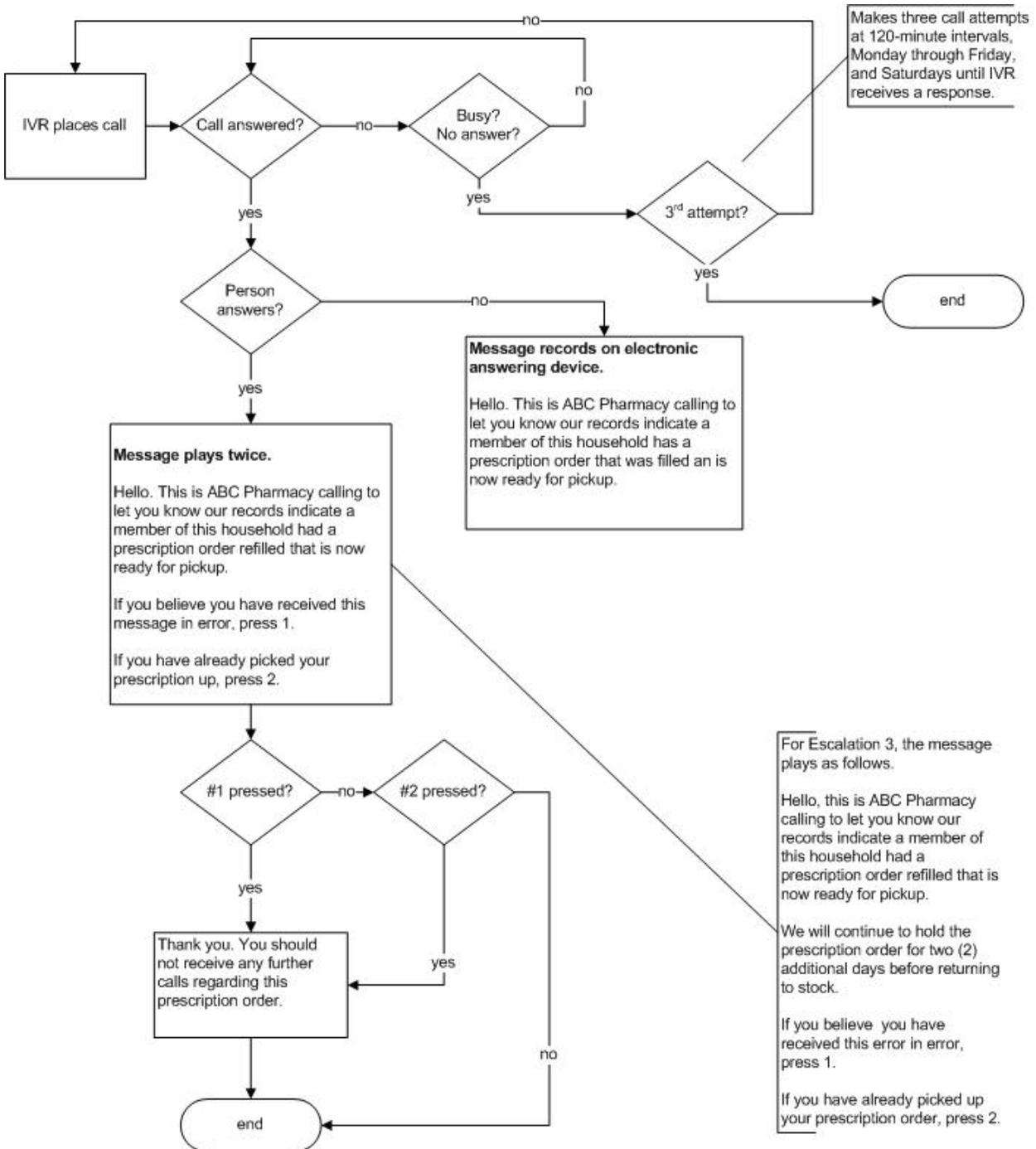
Reminders Preferences Window



Refill Reminder (days)	Patient – Reminder Preferences in Outbound Calling Groupbox			
	Refill Reminder	Compliance Calls		
		Pre Compliance Call 1:	Pre Compliance Call 2:	Post Compliance Call 3:
Default	Default	Default	Do not call	Default
None	No	No	Do not call	Do not call
0	Yes	0	Do not call	Do not call
1	Yes	Yes	Do not call	Default
any positive number	Yes	corresponding number	Do not call	Default
-1	Yes	Default	Do not call	1
-2	Yes	Default	Do not call	2
any negative number	Yes	Default	Do not call	corresponding number

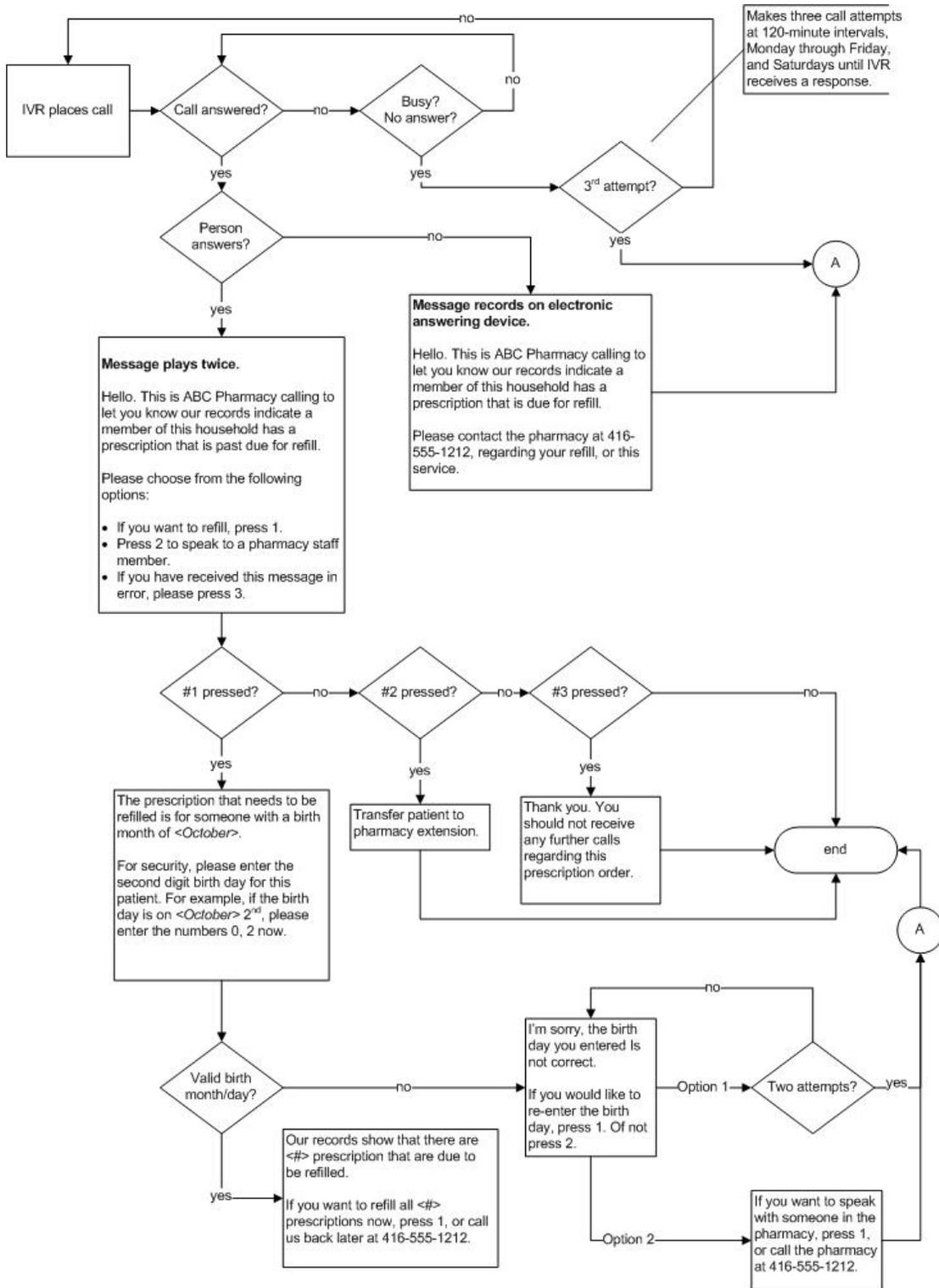
Outbound Will Call Flow: Rx Ready

The following diagram illustrates the call for Escalations 1, 2, and 3.



Outbound Post-Compliance Call Flow for Refill Reminder

The following diagram illustrates the call flow for a post-Compliance call.



Outbound Compliance Call Flow for Refill Reminder

The following diagram illustrates the call flow for seven to one day pre-Compliance.

