

Sending and Receiving Faxes



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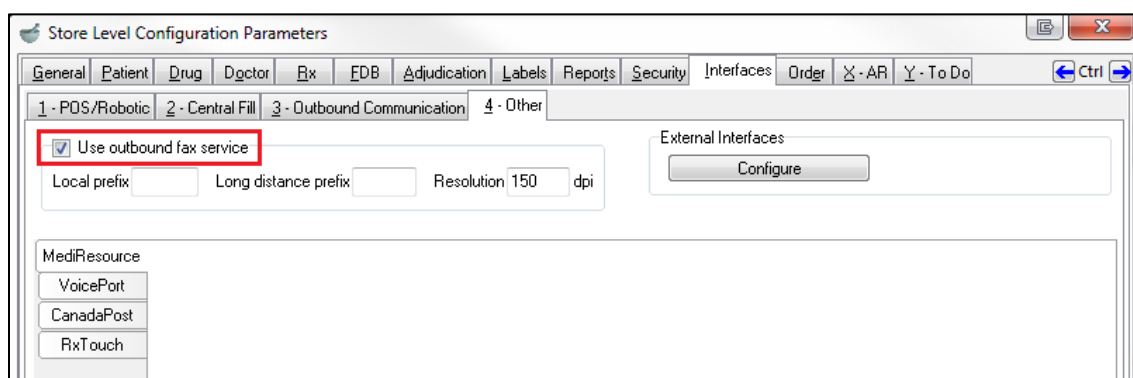
Sending and Receiving Faxes

This document explains the fax functionality in Kroll. It outlines the process for receiving incoming documents and sending outgoing faxes, as well how to send faxes as mail.

Configuration

This section explains how to enable the outbound fax service in Kroll so faxes can be sent and received.

1. From the **Alt-X Start** screen, go to **File > Configuration > Store > Interfaces > Other** and place a checkmark next to **Use outbound fax service**.



2. Click **OK** to close the **Store Level Configuration Parameters** screen.

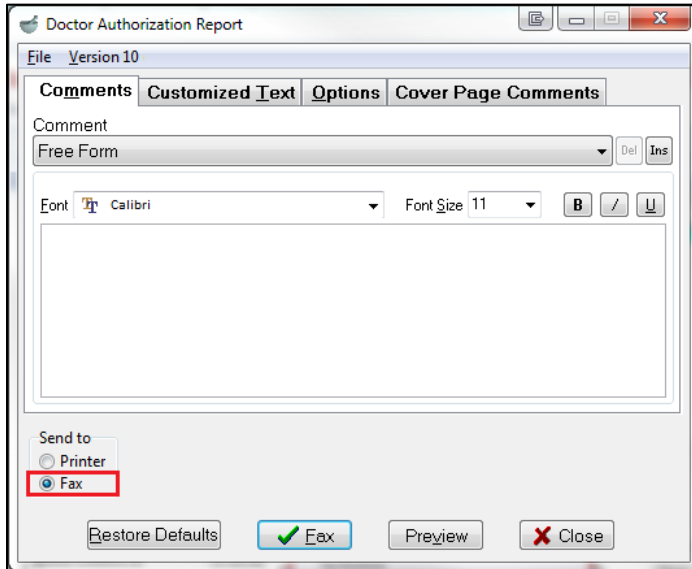
Fax Reports

Several reports can be faxed directly from the report form. This section explains how to fax Prescription Authorization Requests and Rx Transfer Reports.

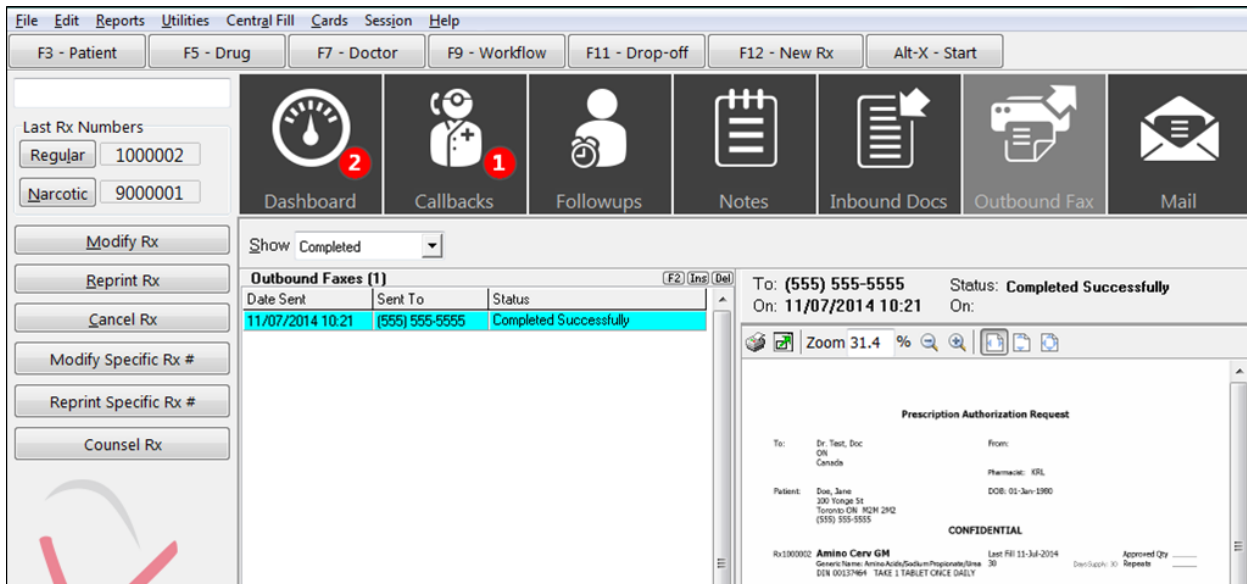
Fax Doctor (Prescription Authorization Request)

1. Call up a patient record and select **All Rxs** from the right navigation pane.
2. Right-click the Rx you want to generate a Doctor Authorization Report for and select **Fax Doctor(s)**.
3. The **Doctor Authorization Report** form will appear. Select the **Fax** radio button and complete the form.

- **Comments tab:** Enter any comments you want to include in the report
- **Customized Text tab:** Enter any body text you want to include in the report
- **Options tab:** Select the components you want to include in the report
- **Cover Page Comments tab:** Enter any comments you want to appear on the cover page for the report



4. Click **Fax**. The Prescription Authorization Request will be sent to the fax number listed on the corresponding doctor profile and will appear in the **Outbound Fax** queue:



The screenshot shows the main application window with a menu bar (File, Edit, Reports, Utilities, Central Fill, Cards, Session, Help) and a toolbar with buttons for F3 - Patient, F5 - Drug, F7 - Doctor, F9 - Workflow, F11 - Drop-off, F12 - New Rx, and Alt-X - Start. Below the toolbar is a row of icons for Dashboard, Callbacks, Followups, Notes, Inbound Docs, Outbound Fax, and Mail. The 'Outbound Fax' icon is highlighted with a red circle and the number 1. The 'Dashboard' icon is highlighted with a red circle and the number 2.

The 'Outbound Faxes (1)' table shows the following data:

Date Sent	Sent To	Status
11/07/2014 10:21	(555) 555-5555	Completed Successfully

The 'Prescription Authorization Request' preview shows the following information:

To: (555) 555-5555 Status: Completed Successfully
 On: 11/07/2014 10:21 On:

Patient: Doe, Jane
 300 Yonge St
 Toronto, ON M5H 2H2
 (555) 555-5555

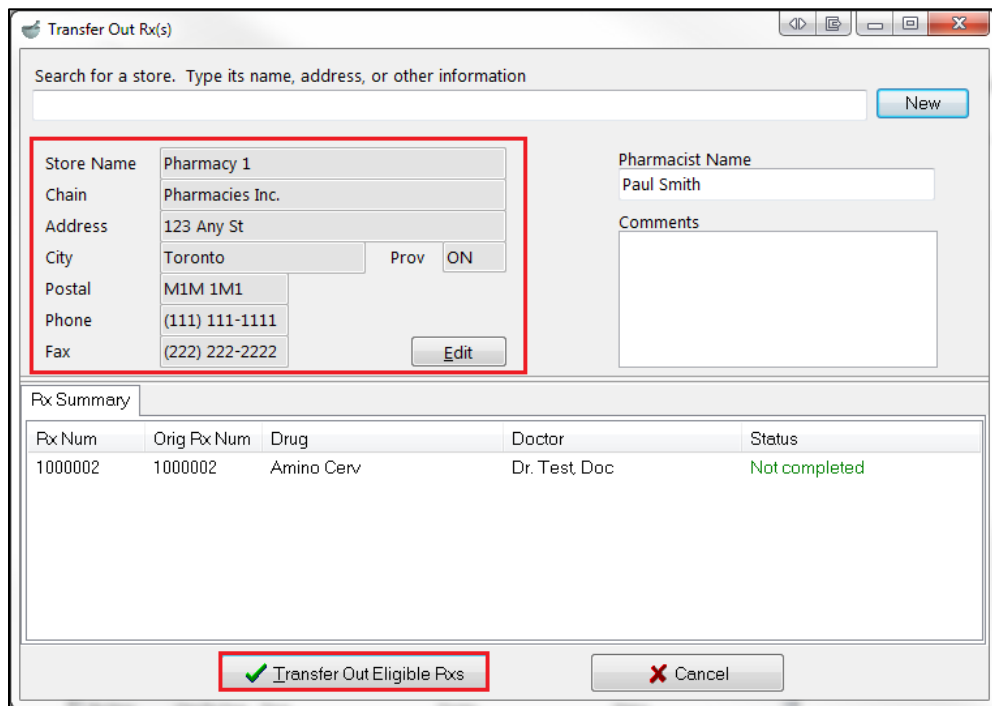
Pharmacy: KRL
 DOB: 01-Jan-1980

CONFIDENTIAL

Rx1300002 Amino Cerv GM Last Fill 11-Jul-2014 Approved Qty: 30
 Generic Name: AminoAcids/Calcium/Pregabalin/Dopa 30
 DSR 00137461 TABLET ORAL ONLY

Rx Transfer Report

1. Call up a patient record and select **All Rxs** from the right navigation pane.
2. Right-click the Rx you want to transfer out and select **Transfer Rx to Another Store**.
3. Search for the store you want to transfer the Rx to and click **Transfer Out Eligible Rxs**.



Transfer Out Rx(s)

Search for a store. Type its name, address, or other information

New

Store Name: Pharmacy 1

Chain: Pharmacies Inc.

Address: 123 Any St

City: Toronto Prov: ON

Postal: M1M 1M1

Phone: (111) 111-1111

Fax: (222) 222-2222 Edit

Pharmacist Name: Paul Smith

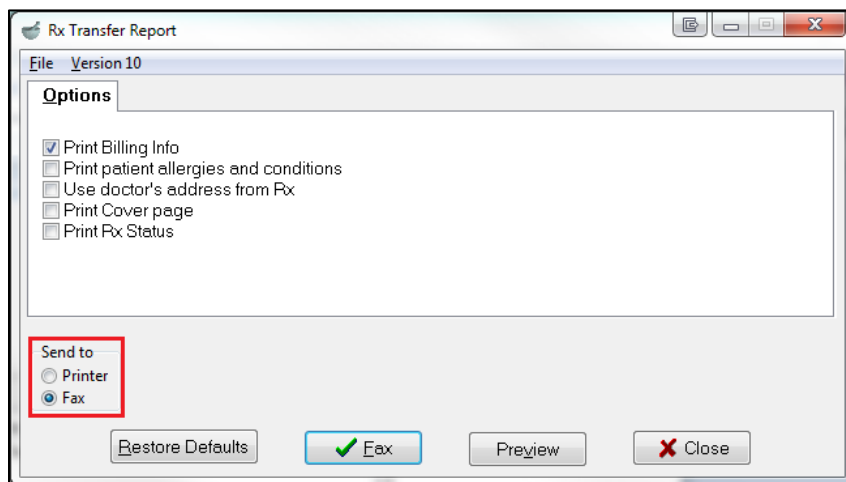
Comments

Rx Summary

Rx Num	Orig Rx Num	Drug	Doctor	Status
1000002	1000002	Amino Cerv	Dr. Test Doc	Not completed

Transfer Out Eligible Rxs Cancel

4. Answer **Yes** when asked 'Do you want to print the Transfer Report?'.
5. Click the **Fax** radio button and select **Fax**.



Rx Transfer Report

File Version 10

Options

☒ Print Billing Info

☐ Print patient allergies and conditions

☐ Use doctor's address from Rx

☐ Print Cover page

☐ Print Rx Status

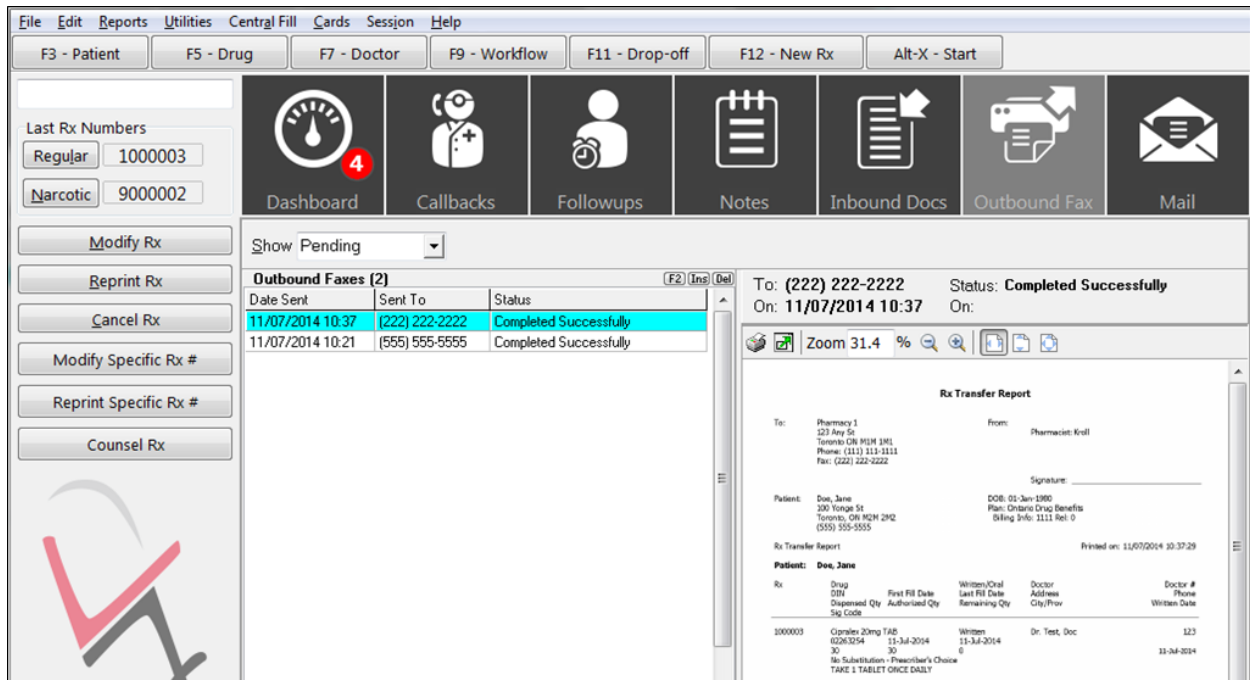
Send to

☐ Printer

☒ Fax

Restore Defaults Fax Preview Close

The Rx Transfer Report will be sent to the fax number on the store record that you selected and will appear in the **Outbound Fax** queue:



Outbound Faxes [2]

Date Sent	Sent To	Status
11/07/2014 10:37	(222) 222-2222	Completed Successfully
11/07/2014 10:21	(555) 555-5555	Completed Successfully

Rx Transfer Report

To: Pharmacy 1
123 Any St
Toronto, ON M1H 1M1
Phone: (111) 111-1111
Fax: (222) 222-2222

From: Pharmacist: Kroll

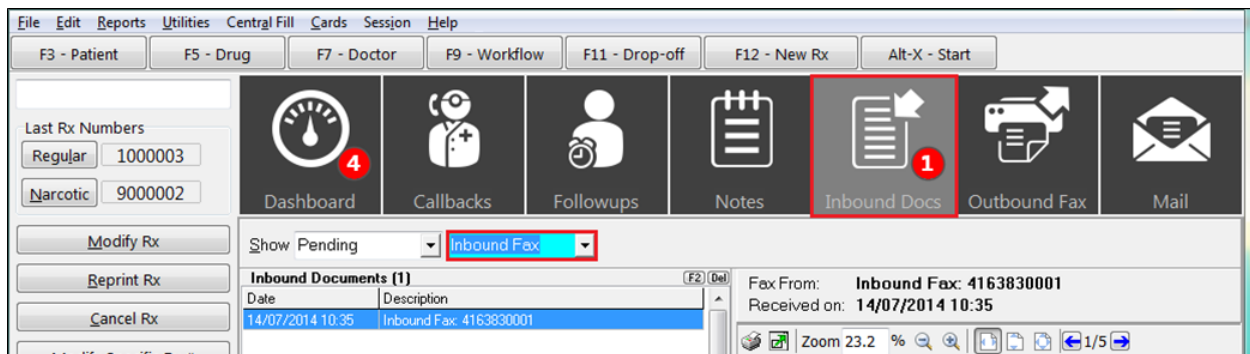
Patient: Doe, Jane
DOB: 01-Jan-1980
Rpt: Ontario Drug Benefits
Billing Info: 1111 Rel: 0

Printed on: 11/07/2014 10:37:29

Rx	Drug	Qty	First Fill Date	Written/Oral Last Fill Date	Doctor Address City/Prov	Doctor # Phone Written Date
1000003	Conazole 20mg TAB	30	11-Jul-2014	11-Jul-2014	Dr. Test, Doc	123 11-04-2014

Inbound Documents

Incoming faxes are located in the **Inbound Docs** screen, which is accessed from the default **Alt-X Start** screen. Select **Inbound Fax** from the highlighted dropdown menu to view inbound faxes.



Inbound Documents [1]

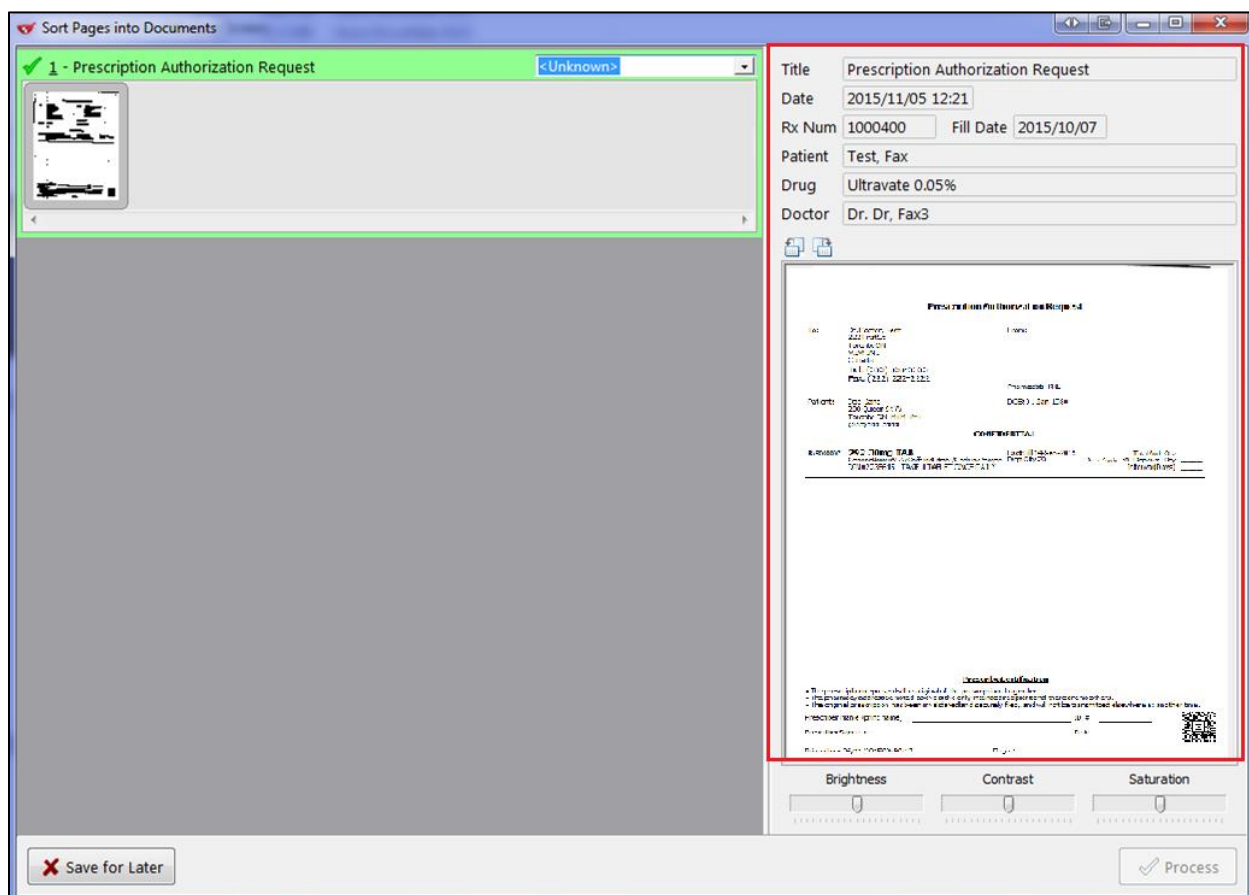
Date	Description
14/07/2014 10:35	Inbound Fax: 4163830001

Fax From: **Inbound Fax: 4163830001**
Received on: **14/07/2014 10:35**

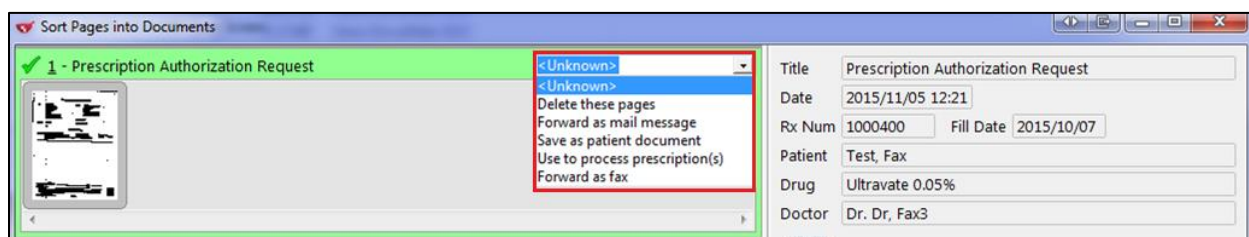
Fax Doctor (Prescription Authorization Request)

Inbound Prescription Authorization Requests contain 2D barcodes that get decoded by the Kroll Background Service. Once a 2D barcode has been decoded

1. Double-click the inbound fax from the **Inbound Documents** frame.
2. The **Sort Pages into Documents** screen will appear. If the 2D barcode has been successfully decoded, Rx information will populate on the right side of the screen.



3. Select an option from the dropdown list at the top of the screen. This determines how the inbound fax will be used.

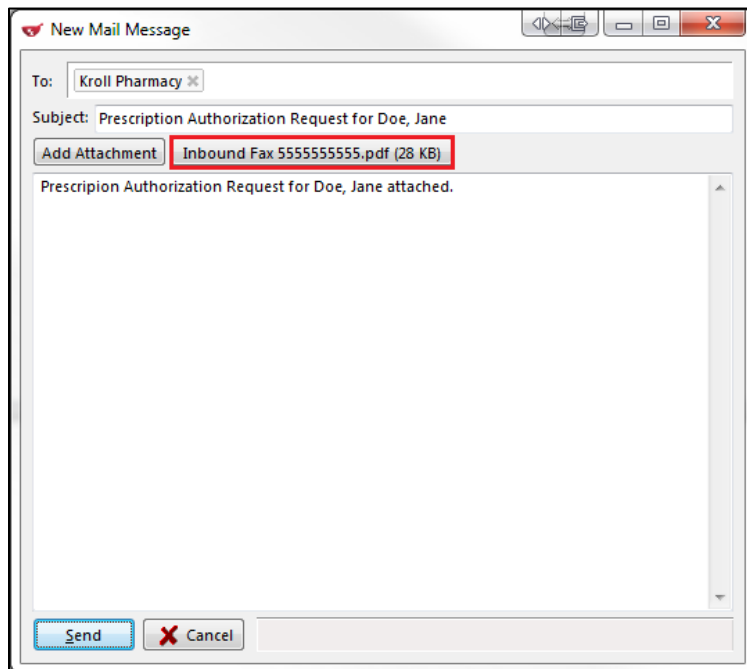


Delete these pages

The inbound fax image will be deleted.

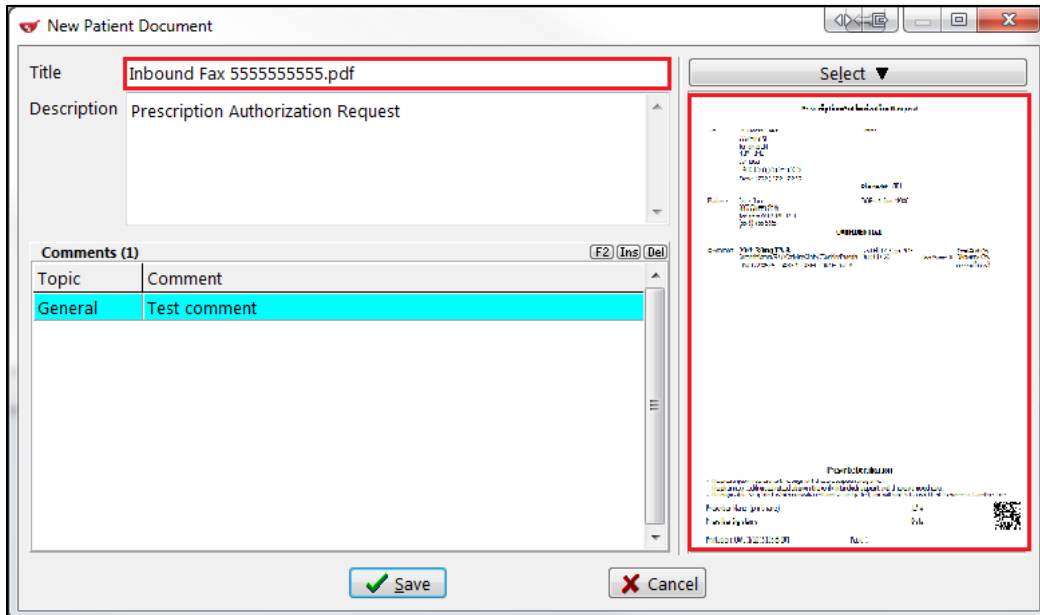
Forward as mail message

The **New Mail Message** screen will appear with the fax image attached. Select a recipient, enter a subject line, and enter any comments in the space provided (optional). Click **Send**.



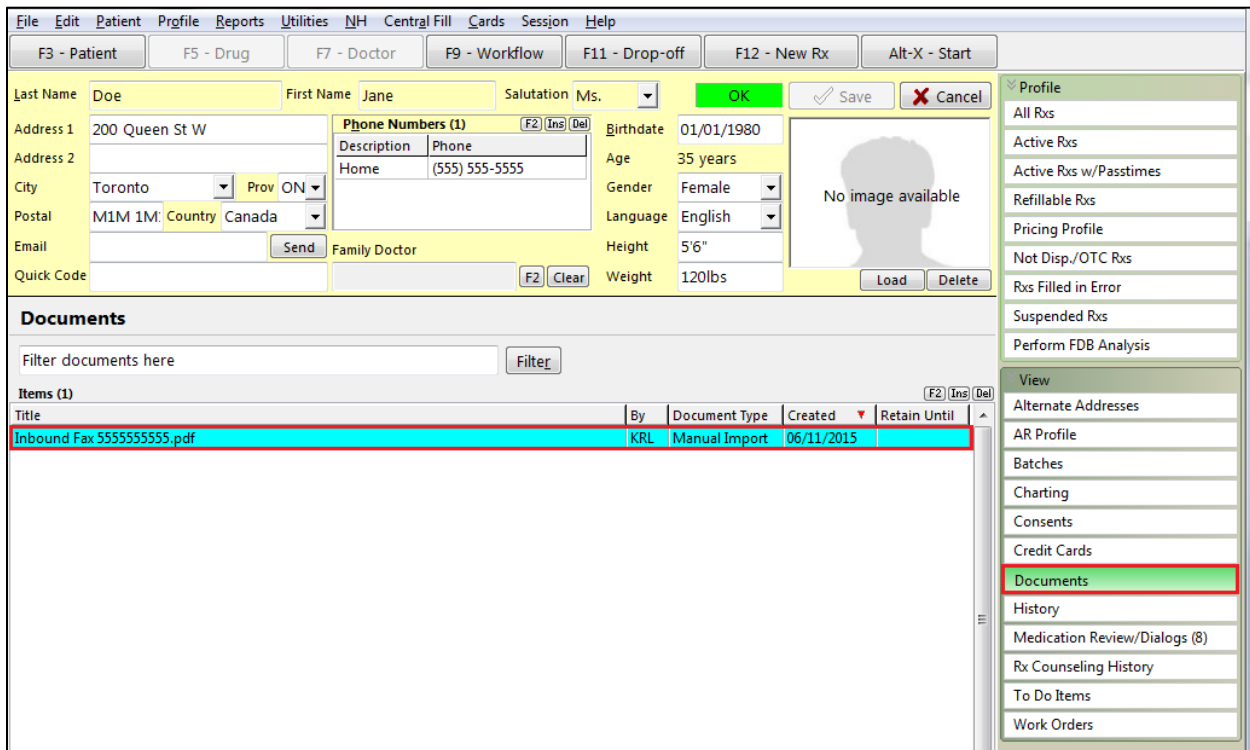
Save as patient document

The **New Patient Document** screen will appear with the fax image attached. Enter a description. Click **Ins** to add a comment to the file (optional). Click **Save**.



The 'New Patient Document' window shows a form for creating a new document. The 'Title' field is 'Inbound Fax 5555555555.pdf' and the 'Description' is 'Prescription Authorization Request'. A 'Comments (1)' section contains a 'General' comment 'Test comment'. A 'Select' dropdown is set to 'All Documents'. A 'Save' button is at the bottom left, and a 'Cancel' button is at the bottom right.

The fax image will appear in the patient's document library. This screen can be accessed by selecting **Documents** from the right navigation pane in the patient card.

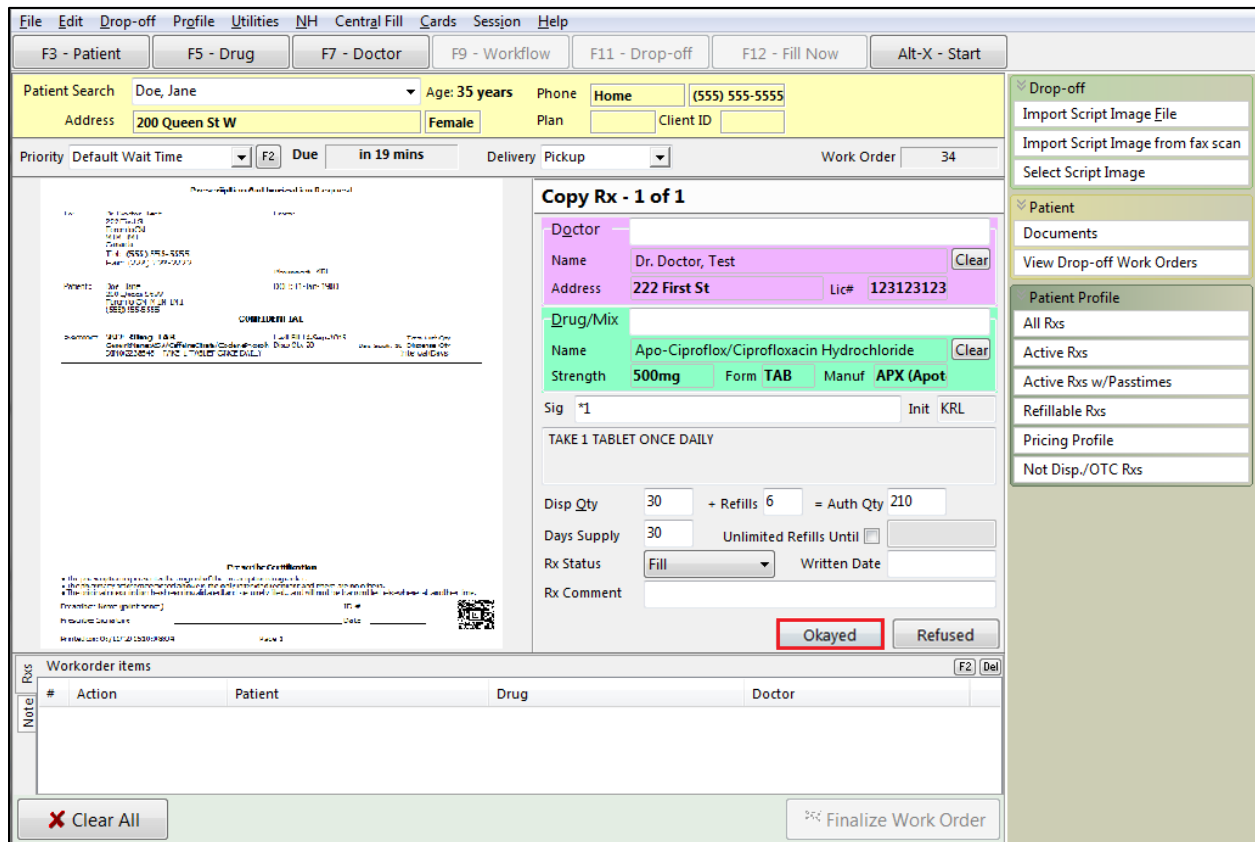


The 'Patient Card' window displays patient information for Jane Doe. The 'Documents' section shows a list of documents, with 'Inbound Fax 5555555555.pdf' highlighted. The right navigation pane shows the 'Documents' option selected.

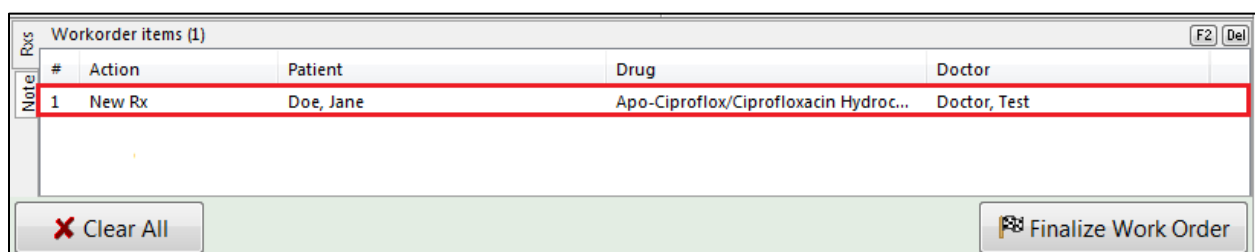
Items (1)	Title	By	Document Type	Created	Retain Until
1	Inbound Fax 5555555555.pdf	KRL	Manual Import	06/11/2015	

Use to process prescriptions

The **F11 - Drop-off** form will appear with the original fill parameters of the faxed Rx. Make any necessary changes to the Rx. Click **Okayed**.



The Rx will be added to the **Workorder items** frame.



If the Prescription Authorization Request contains additional Rx's, the original fill parameters of the next faxed Rx will populate. Make any necessary changes and click **Okayed** for each Rx included in the fax.

When each Rx has been added to the **Workorder items** pane, click **Finalize Work Order**. A To Do record will be created for each Rx.

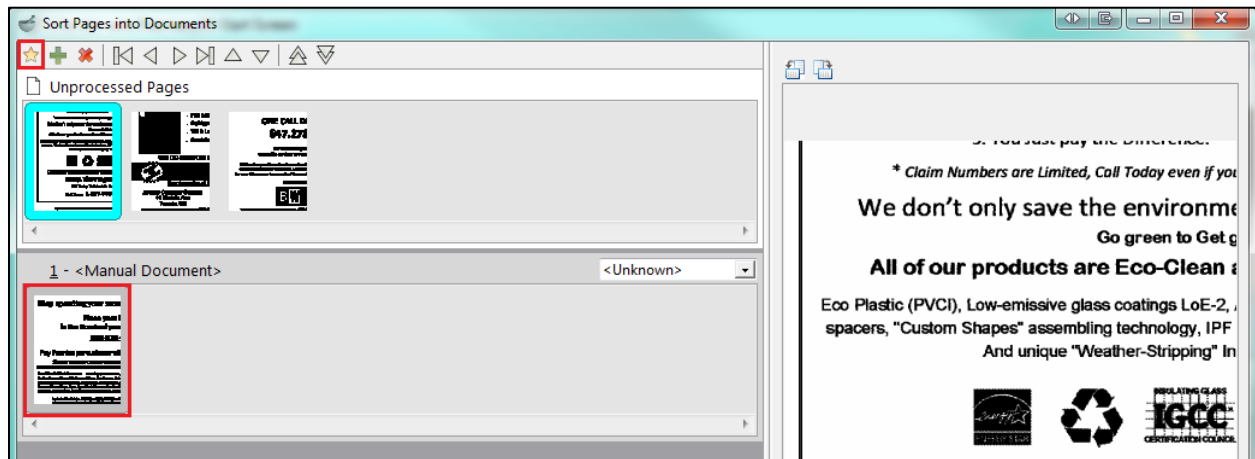
NOTE: If you click **Refused** instead of **Okayed**, no To Do record will be created for the Rx.

The **New Fax Message** screen will appear with the fax image attached. Select a recipient and click **Send**.

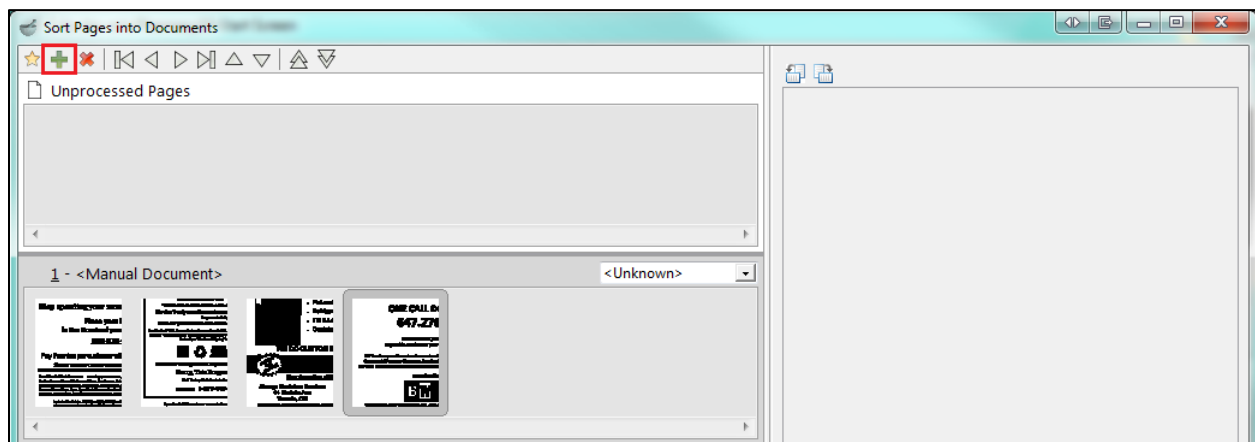
9

Modifying an Inbound Document

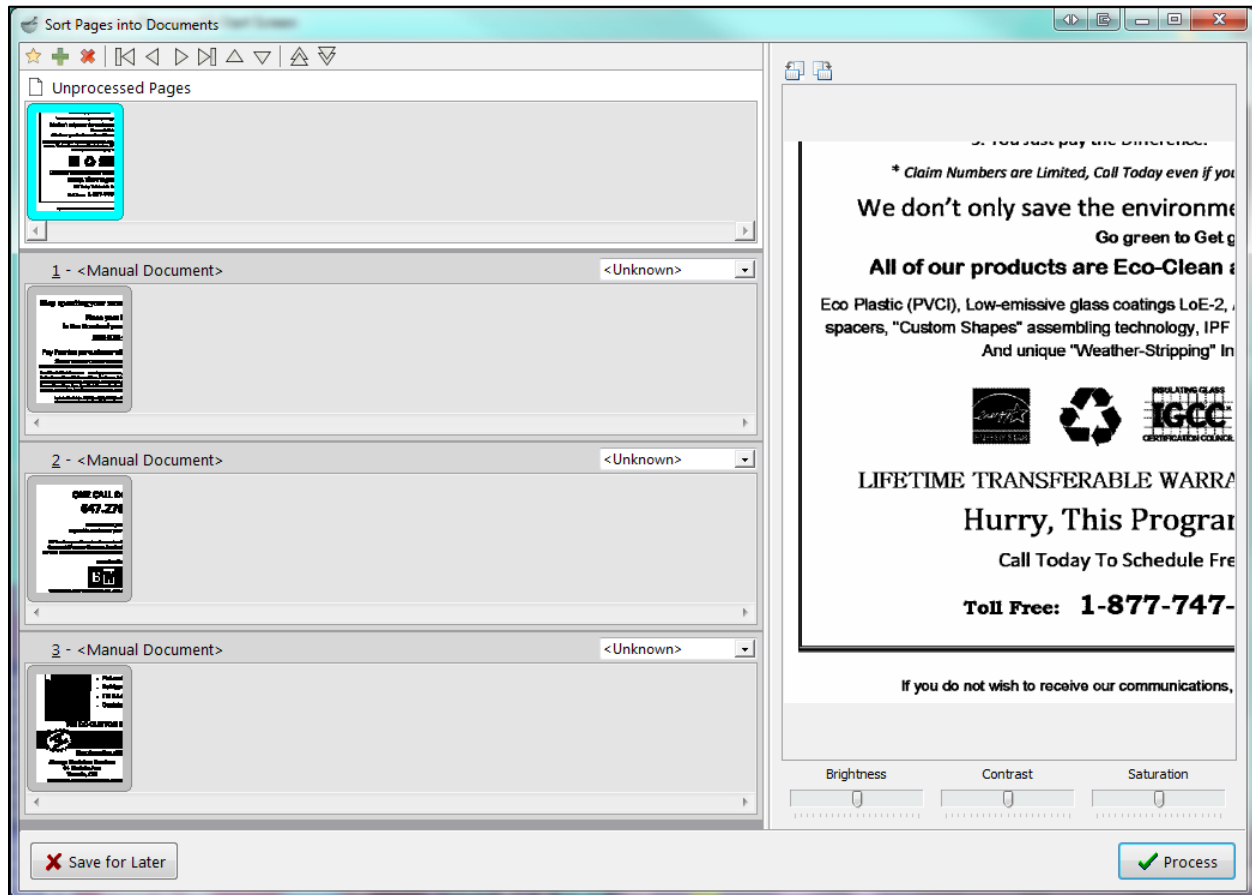
1. Double-click the fax you want to modify.
2. The **Sort Pages into Documents** screen will appear. The pages must be added to a manual document before they can be modified. To do so, select the first page and click the star icon. The page will appear in the **<Manual Document>** pane.



3. Select each additional page you want included in the document and click the plus sign icon. The additional pages will appear in the **<Manual Document>** pane.



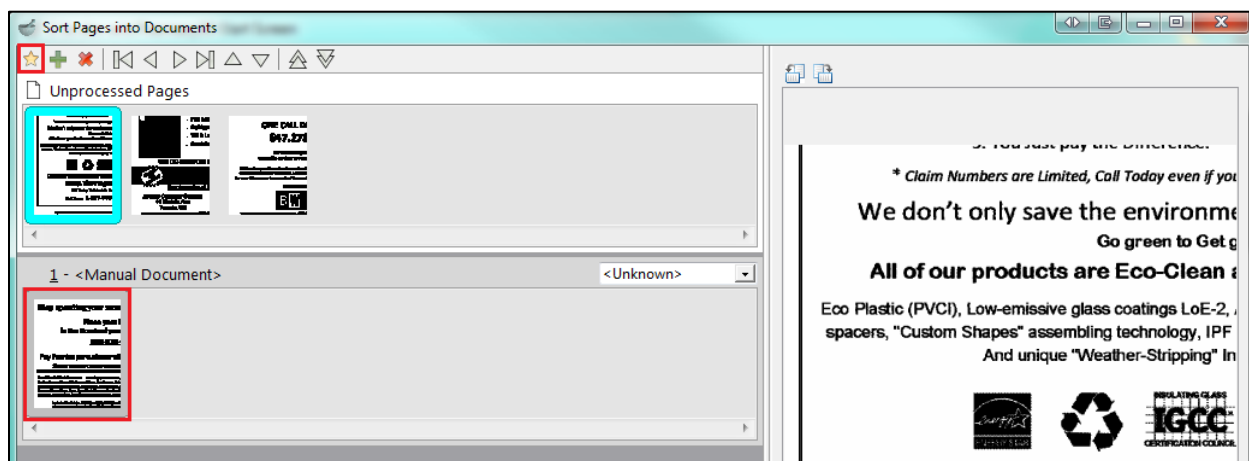
If you want to modify each page separately, click the star icon instead of the plus sign icon for the subsequent pages. Each page will appear in a separate **<Manual Document>** pane and can be modified independently.



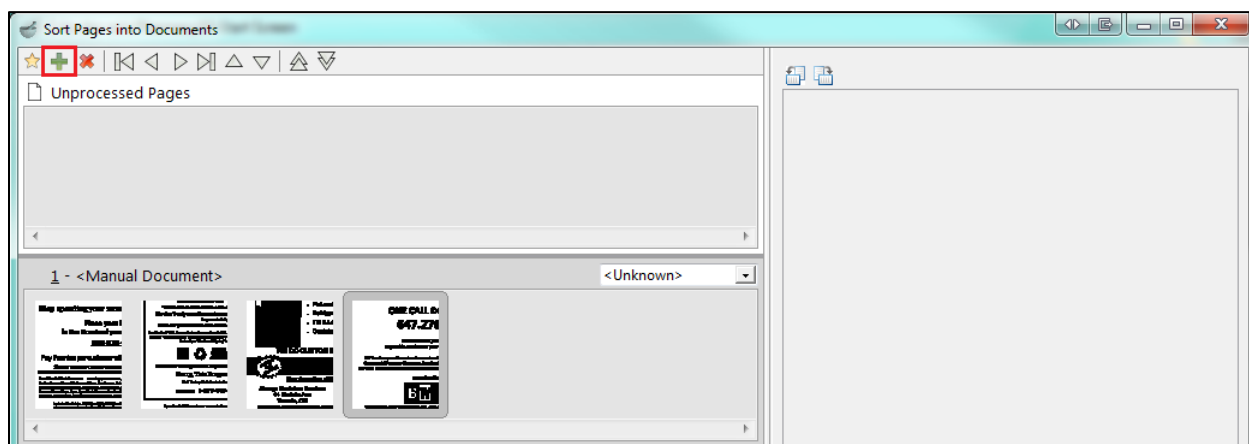
4. Use the **Brightness**, **Contrast**, and **Saturation** controls to adjust the colour display.
5. Click **Process** to save the changes you made to the document.

Using an Inbound Document to Process a Prescription

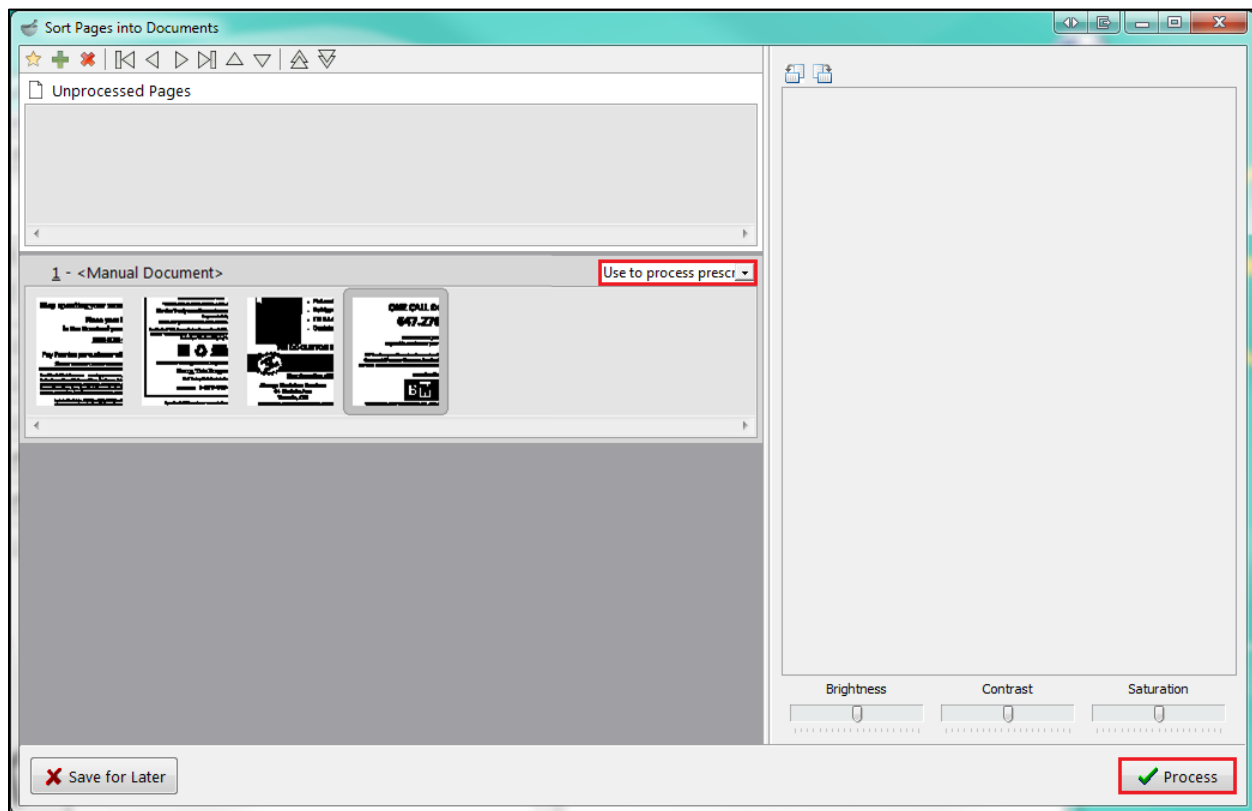
1. Double-click the fax you want to use for a prescription.
2. The **Sort Pages into Documents** screen will appear. The pages must be added to a manual document before they can be used. To do so, select the first page and click the star icon. The page will appear in the **<Manual Document>** pane.



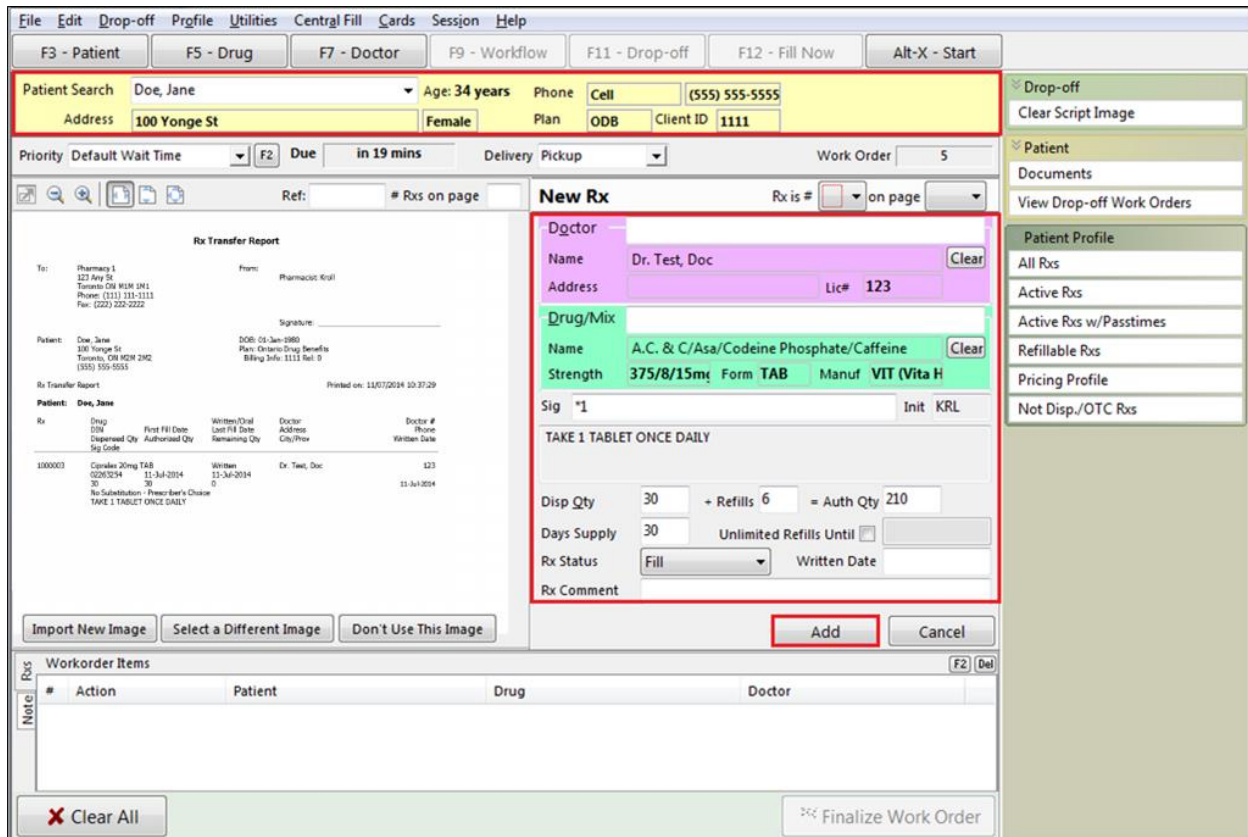
3. Select each additional page you want included in the document and click the plus sign icon. The additional pages will appear in the **<Manual Document>** pane.



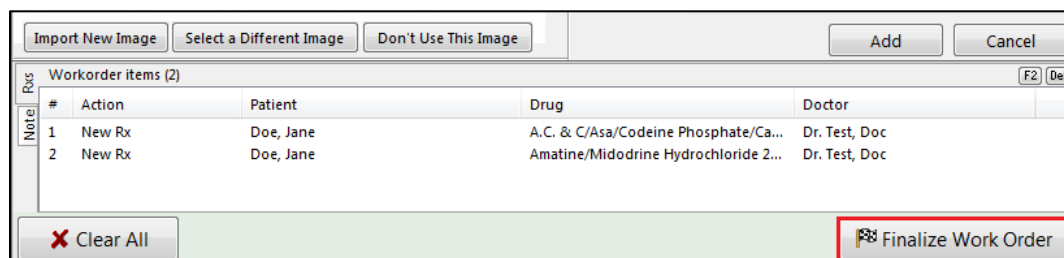
4. Select **Use to process prescription** from the dropdown menu and click **Process**.



- The **Drop-off** screen will appear. Enter the required patient, doctor, and drug information and click **Add**.

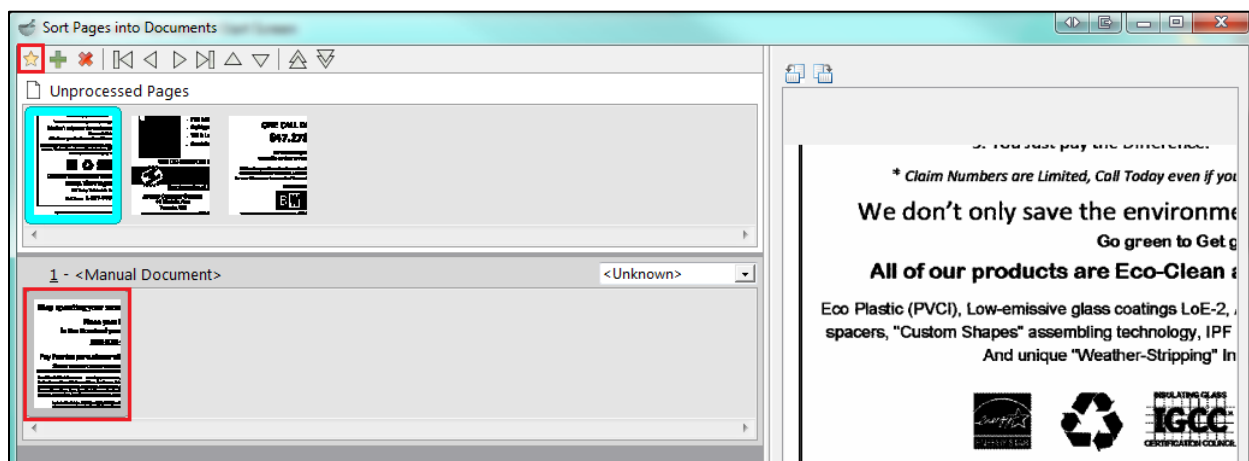


- The Rx will appear in the **Workorder Items** pane. Repeat step 5 for each Rx you want included in the work order. When you are finished, click **Finalize Work Order**.

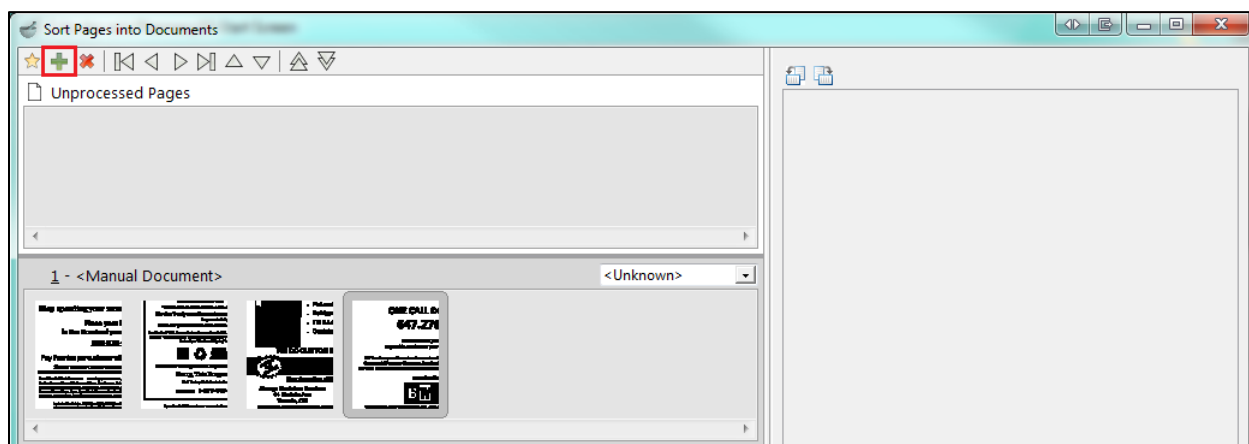


Saving as a Patient Document

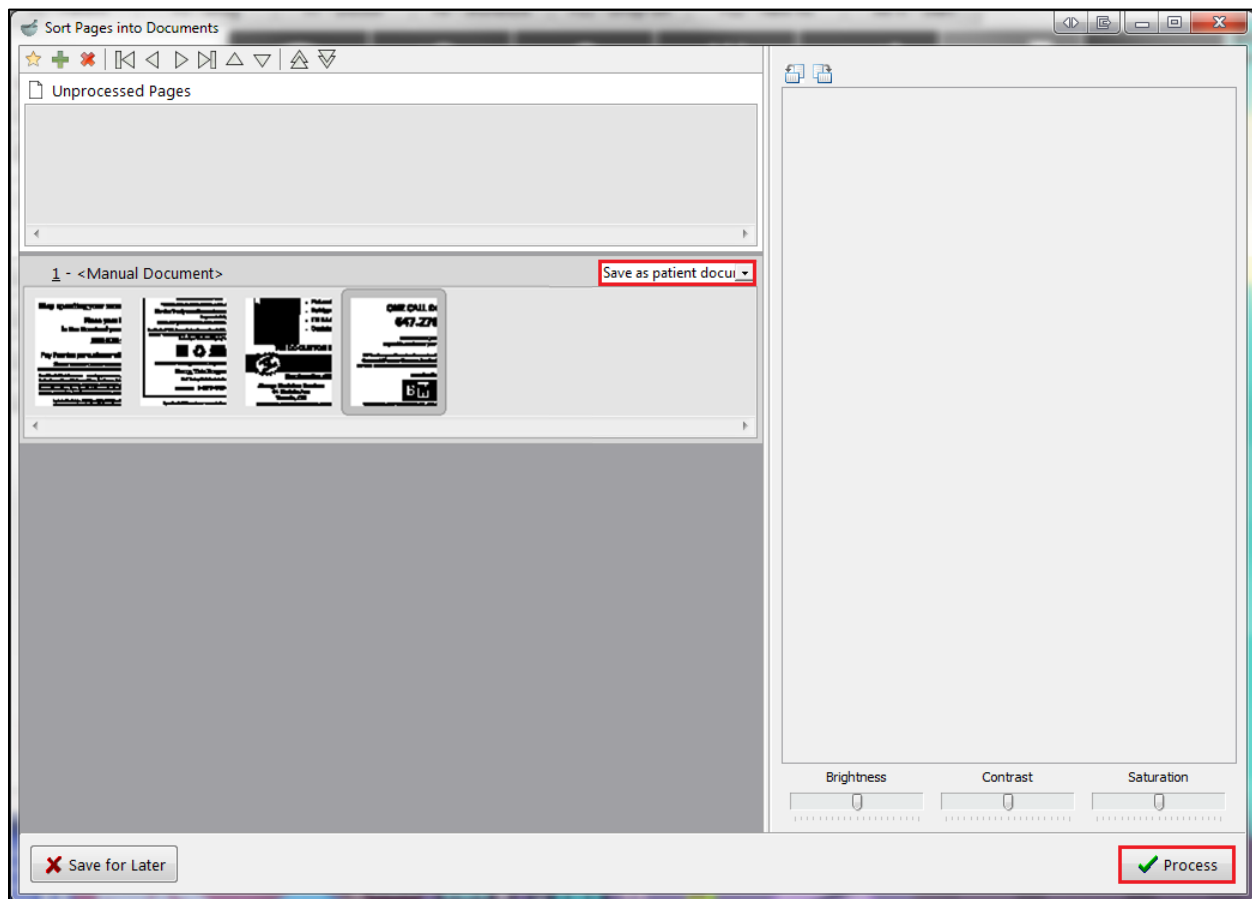
1. Double-click the fax you want to save as a patient document.
2. The **Sort Pages into Documents** screen will appear. The pages must be added to a manual document before they can be used. To do so, select the first page and click the star icon. The page will appear in the **<Manual Document>** pane.



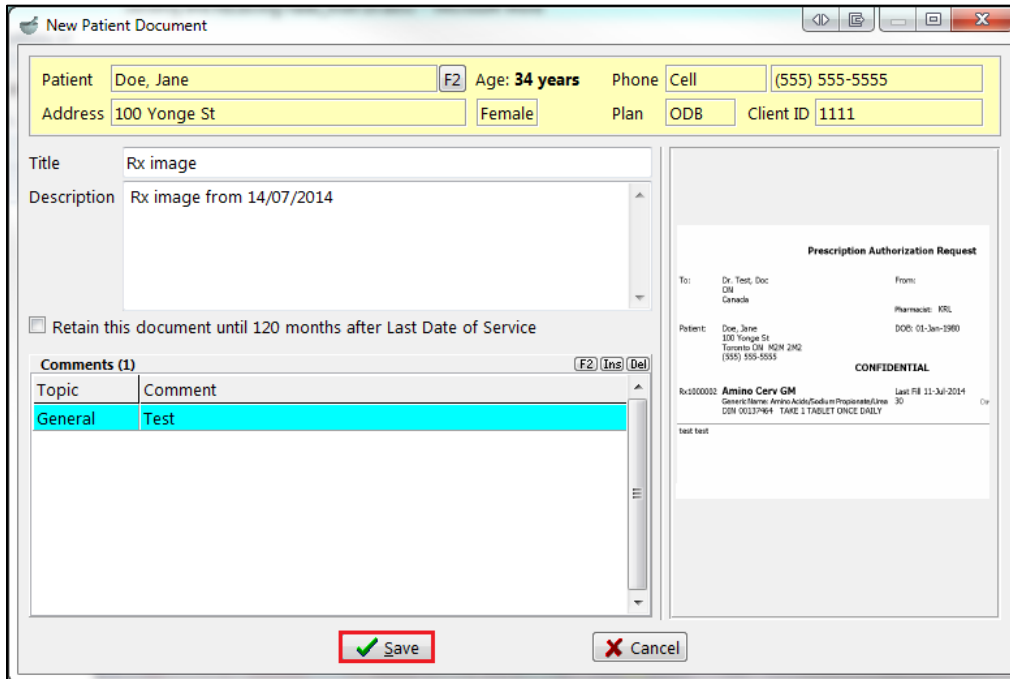
3. Select each additional page you want included in the document and click the plus sign icon. The additional pages will appear in the **<Manual Document>** pane.



4. Select **Save as patient document** from the dropdown menu and click **Process**.



- The **New Patient Document** screen will appear. Click **F2** to perform a patient search. Enter a title and description and any applicable comments. When you are finished, click **Save**.



New Patient Document

Patient: Doe, Jane **F2** Age: 34 years Phone: Cell (555) 555-5555
 Address: 100 Yonge St Female Plan: ODB Client ID: 1111

Title: Rx image
 Description: Rx image from 14/07/2014

☐ Retain this document until 120 months after Last Date of Service

Comments (1) **F2** **Ins** **Del**

Topic	Comment
General	Test

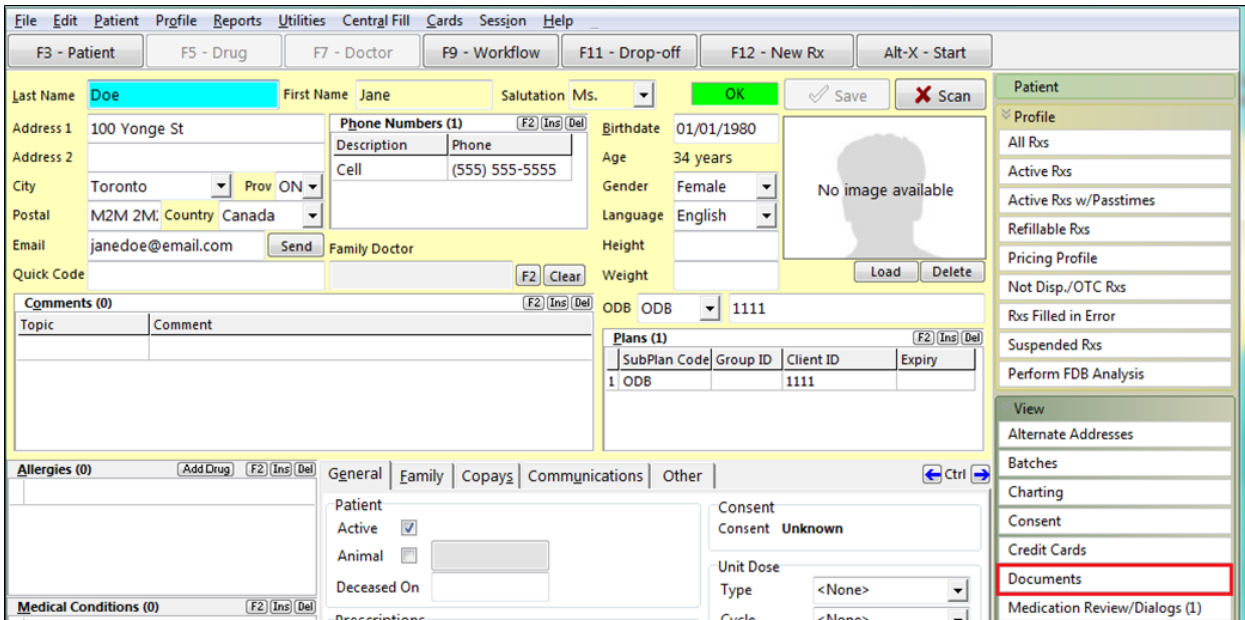
Prescription Authorization Request

To: Dr. Test, Doc
 From: Pharmacist: KROL
 Patient: Doe, Jane
 DOB: 01-Jan-1980
 Rx1000002: Amino Cerv GM
 Last Fill: 11-Jul-2014
 CDS: 00127464 TAKE 1 TABLET ONCE DAILY

CONFIDENTIAL

Save **Cancel**

The document will be added to the patient's documents. To view the document, call up the Patient Profile and select **Documents** from the right navigation pane.



Patient Profile

Last Name: Doe First Name: Jane Salutation: Ms. **OK** **Save** **Scan**

Address 1: 100 Yonge St Address 2: City: Toronto Prov: ON Postal: M2M 2M1 Country: Canada Email: janedoe@email.com **Send**

Phone Numbers (1) **F2** **Ins** **Del**

Description	Phone
Cell	(555) 555-5555

Birthdate: 01/01/1980 Age: 34 years Gender: Female Language: English Height: Weight: ODB: ODB 1111

Plans (1) **F2** **Ins** **Del**

SubPlan Code	Group ID	Client ID	Expiry
1	ODB	1111	

Comments (0) **F2** **Ins** **Del**

Topic	Comment
-------	---------

Allergies (0) **Add Drug** **F2** **Ins** **Del**

Medical Conditions (0) **F2** **Ins** **Del**

General **Family** **Copays** **Communications** **Other**

Patient: Active ☒ Animal: ☐ Deceased On:

Consent: Consent: Unknown Unit Dose: Type: <None> Cycle: <None>

View

- Alternate Addresses
- Batches
- Charting
- Consent
- Credit Cards
- Documents**
- Medication Review/Dialogs (1)

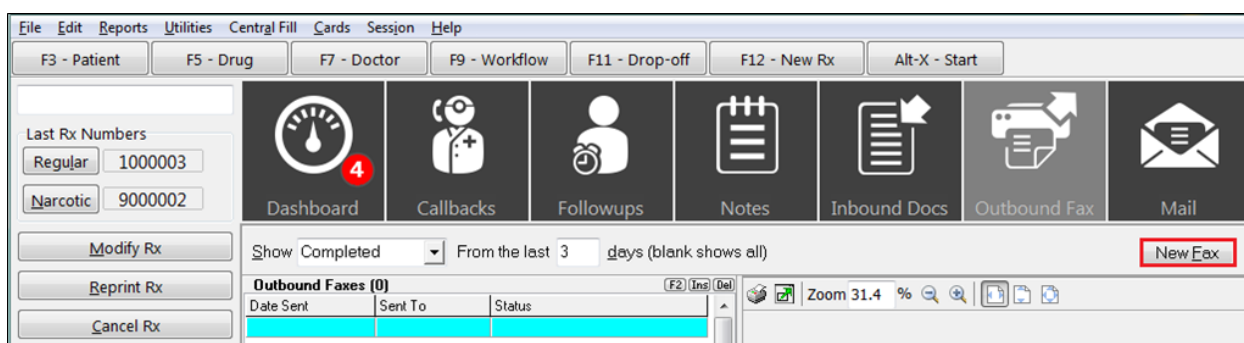
The **Patient Document List** screen will appear. Double-click a document view its contents.

Outgoing Faxes

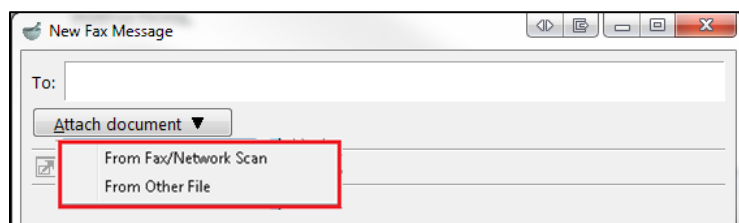
Outgoing faxes are located at the top of the default view on the **Alt-X Start** screen. When sending a fax or mail message, you have the option to include an existing script image from your computer or scan a new image. Please refer to your scanner's user manual for operation instructions.

Sending a Fax

1. Select the **Outbound Fax** tab and click **New Fax**.



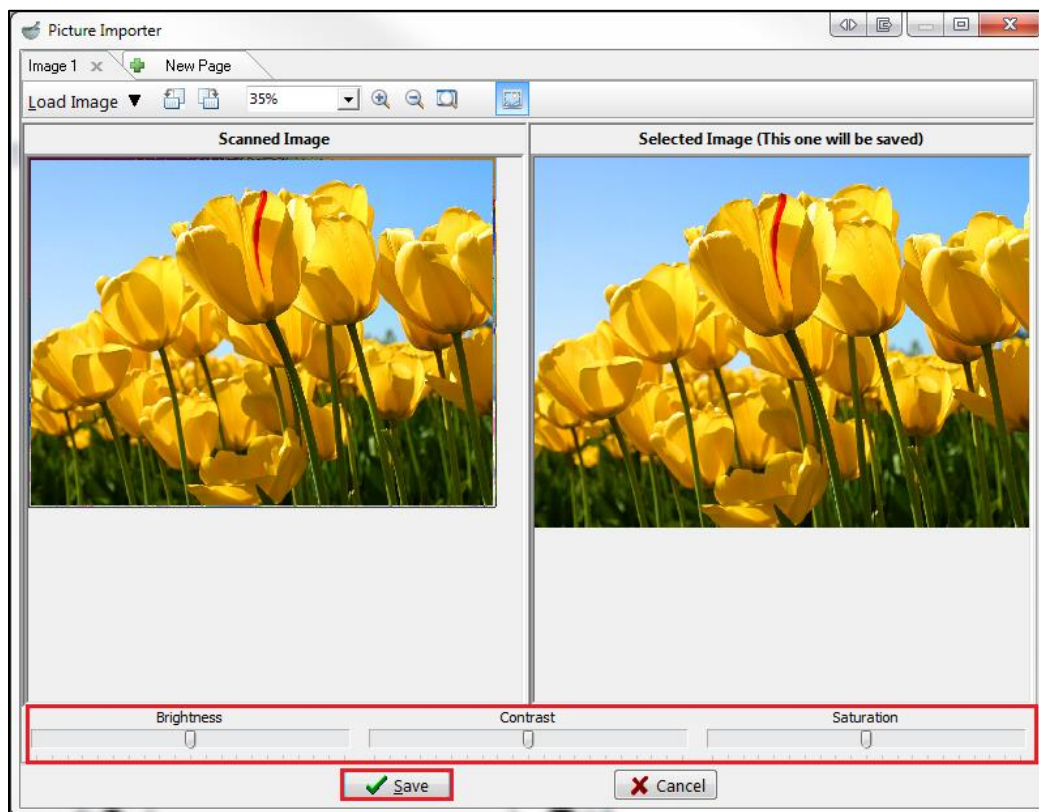
2. Click **Attach Document**. Select **From Fax/Network Scan** to scan a new image, or select **From Other File** to upload an image from your computer.



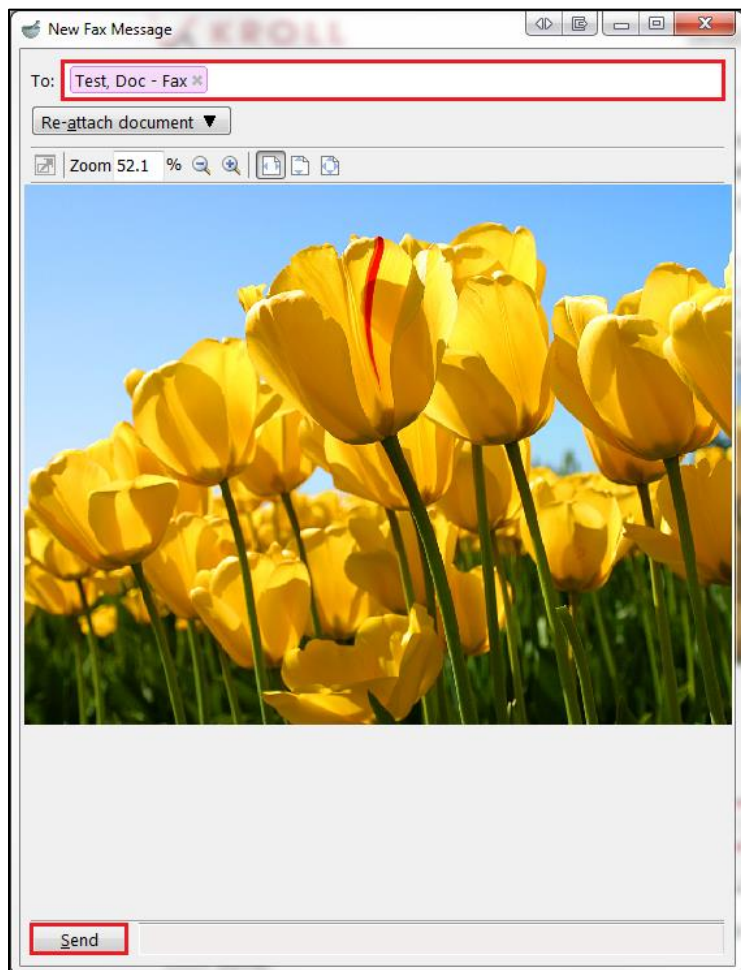
- If you selected **From Fax/Network Scan**, feed the script through your scanner, as shown:



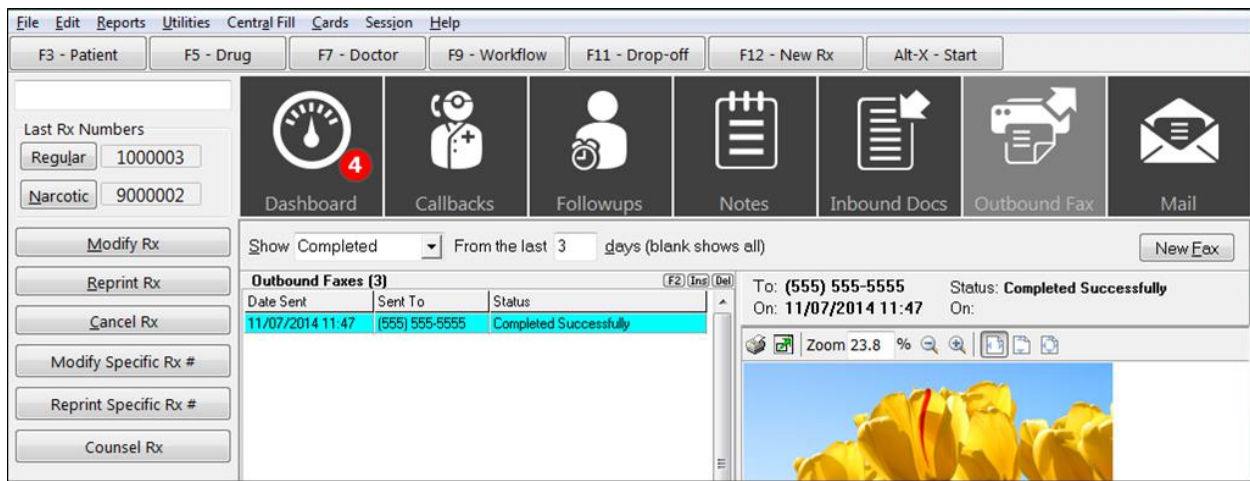
- If you selected **From Other File**, locate the document you want to attach and click **Open**. The image will display in the **Picture Importer** window. Use the **Brightness**, **Contrast**, and **Saturation** controls to adjust the colour display. When you are finished, click **Save**.



3. Enter the recipient's fax number in the **To** field and press the **Enter** key on your keyboard. Click **Send**.

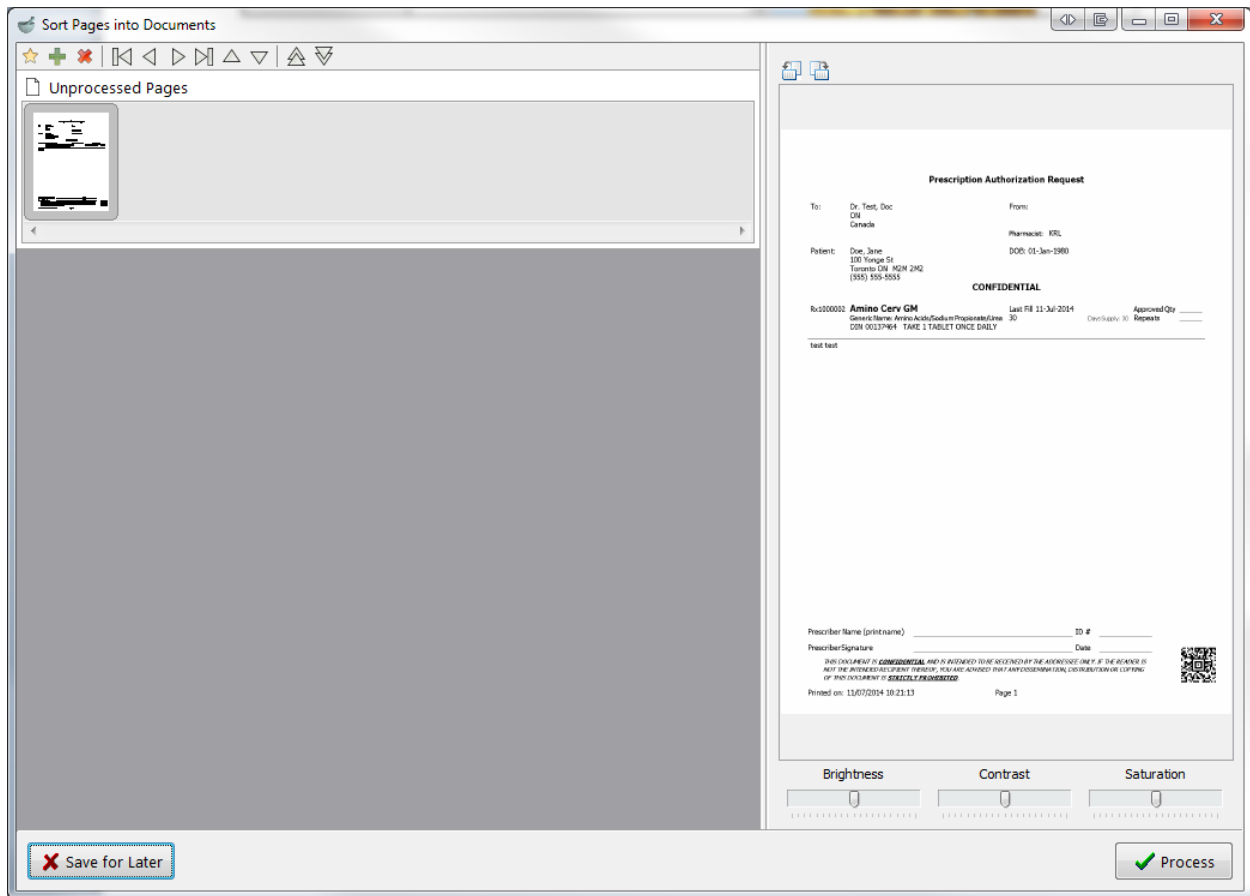


- When the fax has been transmitted, it will show a status of **Completed Successfully**.

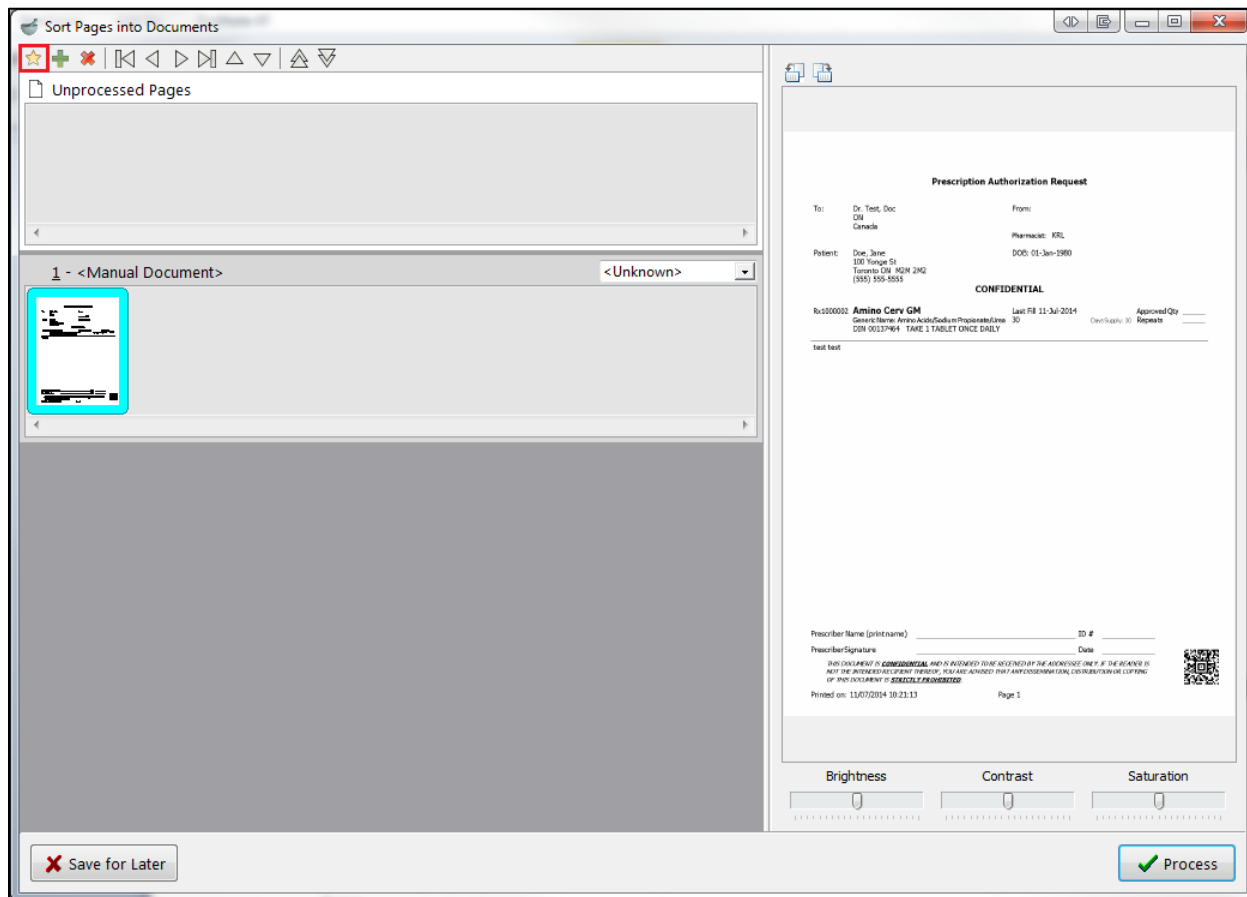


Sending as Mail

- Double-click the document you want to send as a mail message. The document will appear in the **Unprocessed Pages** section of the **Sort Pages into Documents** screen.

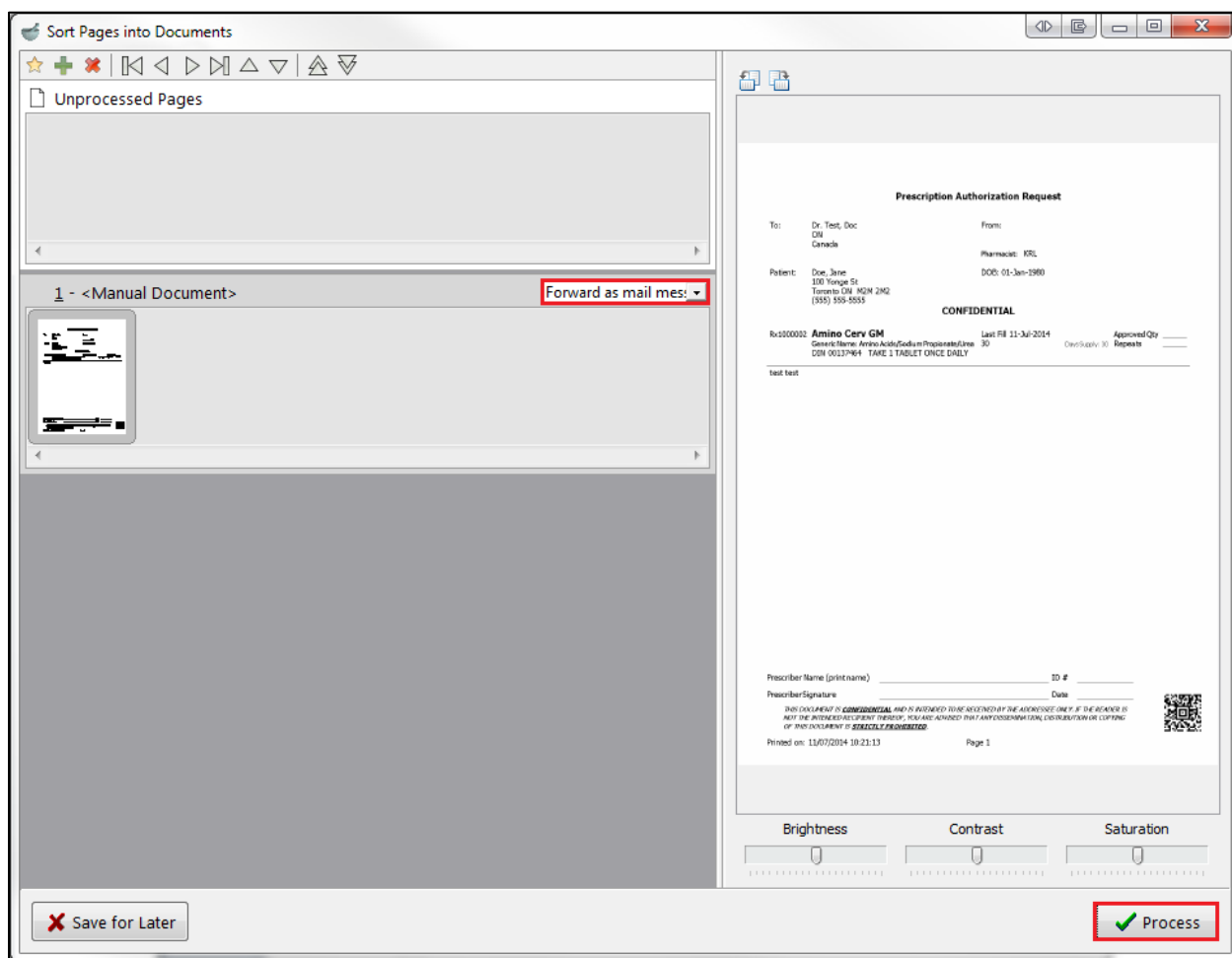


- The page(s) in the document must be added to a manual document before they can be used. To do so, select the first page and click the start icon. The page will appear in the **<Manual Document>** pane.

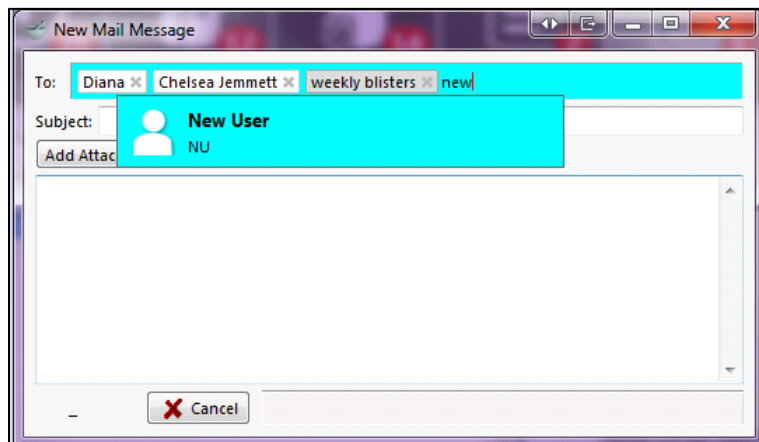


- Select each additional page you want included in the document and click the plus sign icon. The additional pages will appear in the **<Manual Document>** pane.

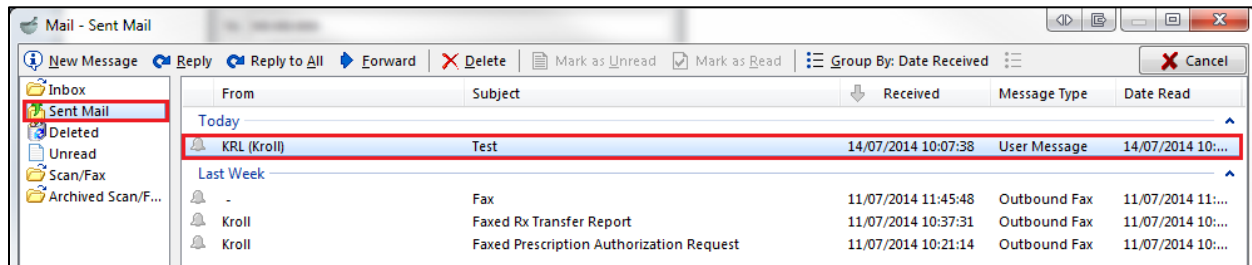
4. Select **Forward as mail message** from the dropdown menu in the **<Manual Document>** pane and click **Process**.



5. The **New Mail Message** window will appear. Enter the recipient's user initials and any body text you want included with the mail message. You can send this message to additional recipients by entering more user initials in the **To:** field. When you are finished, click **Send**.



The mail message will appear in the **Sent Mail** folder (accessed via the **Mail** dashboard icon).



NOTE: Mail messages can be sent to Kroll users only.

Printing and Deleting

This section explains how to print and delete faxes.

To print a fax:

Select the fax you want to print and click the **Print** icon.

File Edit Reports Utilities Central Fill Cards Session Help

F3 - Patient F5 - Drug F7 - Doctor F9 - Workflow F11 - Drop-off F12 - New Rx Alt-X - Start

Last Rx Numbers
Regular 1000003
Narcotic 9000002

Modify Rx
Reprint Rx
Cancel Rx
Modify Specific Rx #
Reprint Specific Rx #
Counsel Rx

Dashboard Callbacks Followups Notes Inbound Docs Outbound Fax Mail

Show Pending

Outbound Faxes (2) (F2) (Ins) (Del)

Date Sent	Sent To	Status
11/07/2014 10:37	(222) 222-2222	Completed Successfully
11/07/2014 10:21	(555) 555-5555	Completed Successfully

To: (222) 222-2222 Status: **Completed Successfully**
On: 11/07/2014 10:37 On:

Zoom 31.4 %

Rx Transfer Report

To: Pharmacy 1
123 Any St.
Toronto ON M5M 1A1
Phone: (213) 311-3311
Fax: (222) 222-2222

From: Pharmacist Kroll

To delete a fax:

Right-click the fax you want to delete and select **Delete**.

