Pharmacy Access Solutions Inc.

ACCESS P✻INT™ Consultant

User Manual

Access Point™ Consultant

A Pharmacist Driven Patient Empowerment Opportunity

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Access Point™ Consultant, the newest version of Access Point™, provides a new approach to recognizing and completing patient interventions. Through the use of facilities, the user's ability to navigate through available functionality is made easier than ever before.

For those users with previous experience using Access Point™, you will notice a few changes:

▶ Deferred Programs is now displayed in the Interventions facility with <u>Open</u> and <u>Completed Interventions</u> neatly separated by tabs, allowing you to easily find and action patient interventions for *any* patient.

▶ Professional Services, CE Modules, Reports and OTC Recommendations have merged into the *Resources* facility, which has been broken into tabs including <u>References</u>, <u>Patient Tools</u>, <u>Reports</u> and <u>CE Modules</u>. For those users with the Blood Glucose Meter Warranty and Registration Program, the <u>Demo Meter</u> tab will also be present. (See **Resources Facility** for further information.)

▶ The Appointment Calendar has been reorganized into the *Calendar* facility with a new look and functionality.

▶ For licensed users, there are a number of new features to take advantage of, including:

PATIENT VIEW. Provides a consolidated view of all Open and Completed interventions on behalf of a specific patient, along with a Medication Profile, Lifestyle information, and CARE PLAN (see CARE PLAN) functionality, to ensure the pharmacist has all patient specific information necessary to support counselling. As part of PATIENT VIEW, the following functionality also exists:

PATIENT SEARCH allows the pharmacist to search for a particular patient in order to access their PATIENT VIEW.

PROFESSIONAL SERVICES action button allows the pharmacist to initiate professional services ON DEMAND with or without the selection of a medication. This feature eliminates the need to put PINs on hold in the patient's dispensing system profile in order to access the required documentation. Applicable Professional Service programs are displayed in a smart manner, depending on the medication selection made in the Medication Profile tab and/or provincial eligibility.

CARE PLAN provides a documentation facility for patient care plans, including drug related and other issues, goals for therapy, recommendations, monitoring and on-going follow-ups. This facility is optional and only available with PATIENT VIEW.

LIFESTYLE tab provides the ability to document on a wide range of lifestyle attributes, which is used to populate Medication Review and other Professional Service documentation requirements without the need to re-enter information, and also to launch other patient-centric programs. A date stamp reminds the pharmacist of the last information update.

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PREFERENCES provides the user with the opportunity to customize Calendar program types, select a store logo, and enter pharmacy staff information and other program related attributes, reducing administration time and ensuring accuracy in required fields.

For more information on these features and/or the Professional Services Modules and other Modules in development, email **BD@pharmacyaccess.com** to connect with a sales representative.

We hope you enjoy Access Point™ Consultant, now let's get started!
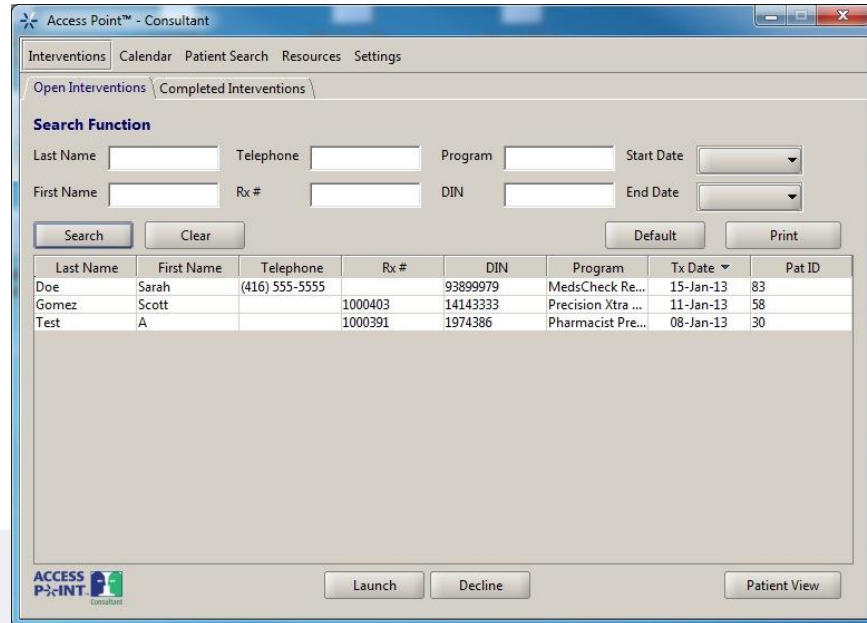
Left click on the *Starburst* located on the bottom right hand corner of your screen to launch Access Point™ Consultant.

Note: Access Point™ Consultant should remain open during daily dispensing activity. This will allow you to easily toggle back and forth from the dispensing system.

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INTERVENTIONS FACILITY

The *Interventions* facility is the landing page of Access Point™ Consultant. This facility provides information on **all** patient interventions organized in 2 tabs as <u>Open Interventions</u> and <u>Completed Interventions</u>.
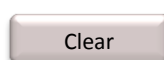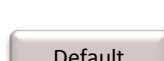
OPEN INTERVENTIONS TAB

SEARCH FUNCTION

► Function buttons include:

Button	Description
Search	Criteria entered by the user will be displayed when SEARCH or ENTER on the keyboard is selected.
Clear	Removes any search criteria and returns the listing to view all interventions.
Default	Clears any search criteria and resets the column order and sort to the default view.
Print	Provides a "preview [number of pages]" and allows the user to print a list of the currently displayed interventions.

► The user can search using the following criteria:

- Last Name
- First Name
- Telephone #
- Rx #
- DIN

- Program
- Start Date
- End Date

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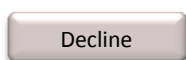
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▶ The search functionality will utilize all field entries to perform the search (i.e. First Name "Me" and Last Name "RIB" will provide a list of all patient interventions that meet both search criteria).

▶ The user can display one or more open Professional Service interventions by selecting from the "Program" drop-down of the Search Function.

▶ Any entered search criteria will remain until the user selects CLEAR, DEFAULT or restarts Access Point™ Consultant.

OPEN INTERVENTIONS LISTING

▶ Action buttons include:

| Launch | Highlight the desired intervention and select LAUNCH to open the Program Documentation Panel specific to the intervention. |

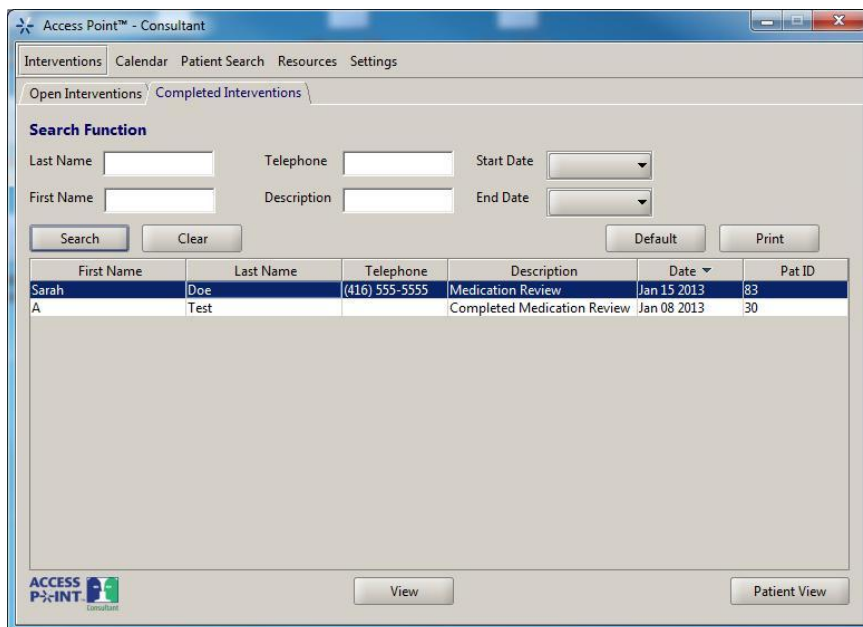| Decline | Highlight the desired intervention and select DECLINE to remove the intervention from the listing. |

| Patient View | Highlight the desired intervention and select PATIENT VIEW to access the Interventions tab of the PATIENT VIEW for this patient. |

▶ Entries will be displayed with the most recent intervention at the top of the listing by default.

▶ Column order can be reorganized by the user by selecting a column and dragging it to a new position.

▶ Selecting any column header will sort the displayed interventions in the opposite order i.e. descending to ascending if previously displayed as ascending to descending.

▶ The column order and/or sort will reset to default when Access Point™ Consultant is restarted or when the DEFAULT button is selected.

OPEN INTERVENTIONS SAMPLE PRINT OUTPUT

Last Name	First Name	Telephone #	Description	Date
Doe	Sarah	416-555-5555	Pharmaceutical Opinion	12/03/2012
Smith	Jane	905-555-8523	Medication Review	11/03/2012

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COMPLETED INTERVENTIONS TAB

SEARCH FUNCTION

► Function buttons include:

Search	Criteria entered by the user will be displayed when SEARCH or ENTER on the keyboard is selected.
Clear	Removes any search criteria and returns the listing to view all interventions.
Default	Clears any search criteria and resets the column order and sort to the default view.
Print	Provides a "preview [number of pages]" and allows the user to print a list of the currently displayed interventions. If a search has been performed, the results of the search will print.

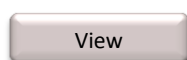► The user can perform a **SEARCH** using the following criteria:

- Last Name
- First Name
- Telephone #

- Program
- Start Date
- End Date

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6711 Mississauga Road, Suite 400, Mississauga, Ontario, L5N 2W3, T: 905-607-3809, F: 905-607-8919,
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▶ The search functionality will utilize all field entries to perform the search (i.e. First Name "Me" and Last Name "RIB" will provide a list of all patient interventions that meet both search criteria).

▶ The user can display one or more open Professional Service interventions by selecting from the "Program" drop-down of the Search Function.

▶ Any entered search criteria will remain until the user selects CLEAR, DEFAULT or restarts Access Point™ Consultant.

COMPLETED INTERVENTIONS LISTING
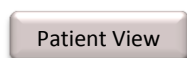
▶ Action buttons include:

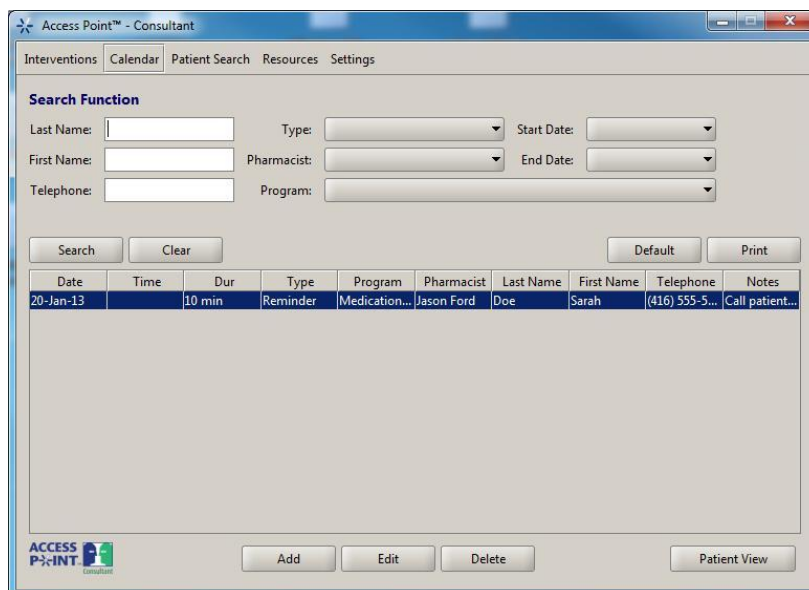| View | Opens a pdf copy of the selected document. |

| Patient View | Highlight the desired intervention and select PATIENT VIEW to access the <u>Interventions</u> tab of the PATIENT VIEW for this patient. |

▶ Entries will be displayed with the most recent intervention at the top of the listing by default.

▶ Column order can be reorganized by the user by selecting a column and dragging it to a new position.

▶ Selecting any column header will sort the displayed interventions in the opposite order i.e. descending to ascending if previously displayed as ascending to descending.

▶ The column order and/or sort will reset to default when Access Point™ Consultant is restarted or when the DEFAULT button is selected.
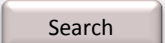
COMPLETED INTERVENTIONS SAMPLE PRINT OUTPUT

Last Name	First Name	Telephone #	Description	Date
Doe	Sarah	416-555-5555	Pharmaceutical Opinion	12/03/2012
Smith	Jane	905-555-8523	Medication Review	11/03/2012

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SEARCH FUNCTION

▶ Function buttons include:

Search	Criteria entered by the user will be displayed when SEARCH or ENTER on the keyboard is selected.
Clear	Removes any search criteria and returns the listing to view all entries.
Default	Clears any search criteria and resets the column order and sort to the default view.
Print	Provides a "preview [number of pages]" and allows the user to print a list of the currently displayed items. If a search has been performed, the search results displayed will print.

▶ The user can perform a search using the following criteria:

- Last Name
- First Name
- Telephone #
- Pharmacist

- Type
- Program
- Start Date
- End Date

▶ The search functionality will utilize all field entries to perform the search (i.e. First Name "Me" and Last Name "RIB" will provide a list of all patients that meet both search criteria).

▶ Any entered search criteria will remain until the user selects CLEAR, DEFAULT or restarts Access Point™ Consultant.

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CALENDAR LISTING

▶ Action buttons include:

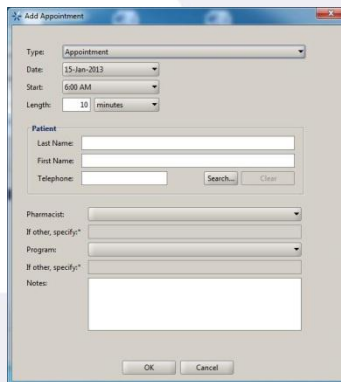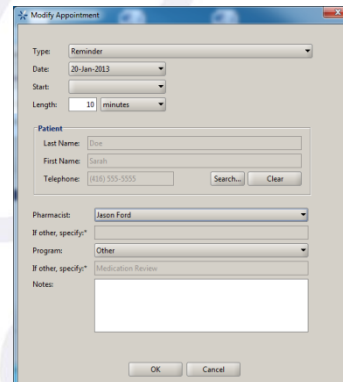| Button	Description
Add	Launches the Add Appointment panel (See Add Appointment panel).
Edit	Launches the Edit Appointment panel for the highlighted listing (See Edit Appointment panel).
Delete	Allows the user to delete entries in the Calendar listing.
Patient View	Highlight the desired entry and select PATIENT VIEW to access the <u>Interventions</u> tab of the PATIENT VIEW for this patient.

Add Appointment Panel	**Edit Appointment Panel**

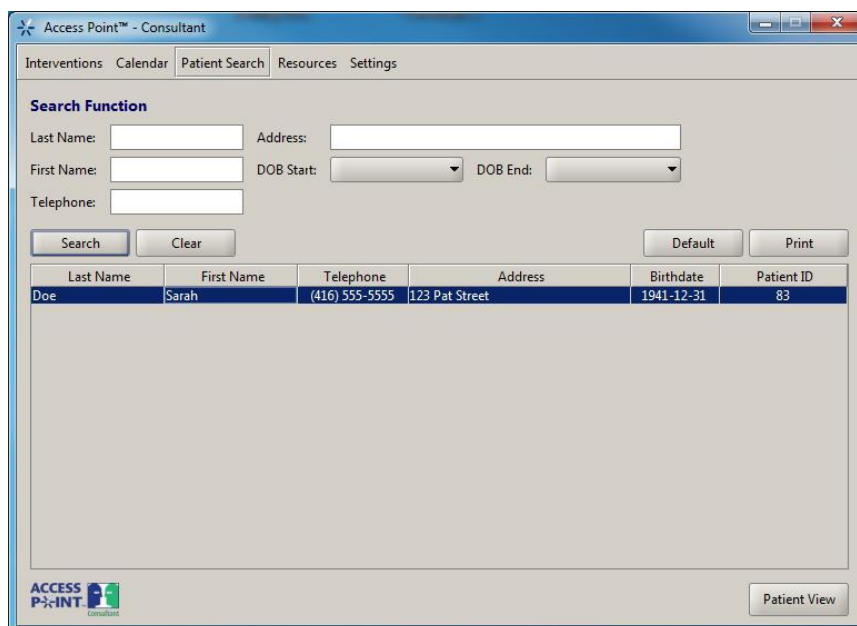| Button	Description
Ok	Accepts the addition/edit/deletion to the *Calendar* facility listing.
Cancel	Returns the user to the *Calendar* facility listing.

See *Settings* facility, <u>Preferences</u> tab for Appointment Type and Pharmacist custom options.

▶ Entries will be displayed with the most recent appointment at the top of the listing by default.

▶ Column order can be reorganized by the user.

▶ Selecting any column header will sort the displayed appointments in the opposite order i.e. descending to ascending if previously displayed as ascending to descending.

▶ The column order and/or sort will reset to default when Access Point™ Consultant is restarted or when the DEFAULT button is selected.

CALENDAR PRINT OUTPUT

Date	Time	Duration	Type	Program	Pharmacist	Pt Last Name	Pt First Name	Telephone #	Notes
									Call to follow up on injection service provided on Nov 11,
12/11/2012	9:00am	10 min	Reminder	Injection Administration	Paul Cairns	Doe	Sarah	416-555-5555	2012
14/11/2012	3:00pm	15 min	Appointment	Medication Review	Mandy Moore	Smith	Jane	905-555-8521	

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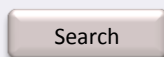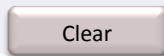
SEARCH FUNCTION

▶ Function buttons include:

Search	Criteria entered by the user will be displayed when SEARCH or ENTER on the keyboard is selected.
Clear	Removes any search criteria and previously displayed entries.
Default	Clears any search criteria and resets the column order and sort to the default view.
Print	Provides a "preview [number of pages]" and allows the user to print a list of the currently displayed patients. If a search has been performed, the search results records will print.

▶ The user can perform a patient search using the following criteria:

- Last Name
- First Name
- Telephone #
- Address
- Birthdate (start and end date range)

▶ The search functionality will utilize all field entries to perform the search (i.e. First Name "Me" and Last Name "RIB" will provide a list of all patients that meet both search criteria).

▶ Any entered search criteria will remain until the user selects CLEAR, DEFAULT or restarts Access Point™ Consultant.

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PATIENT LISTING

▶ Action buttons include:

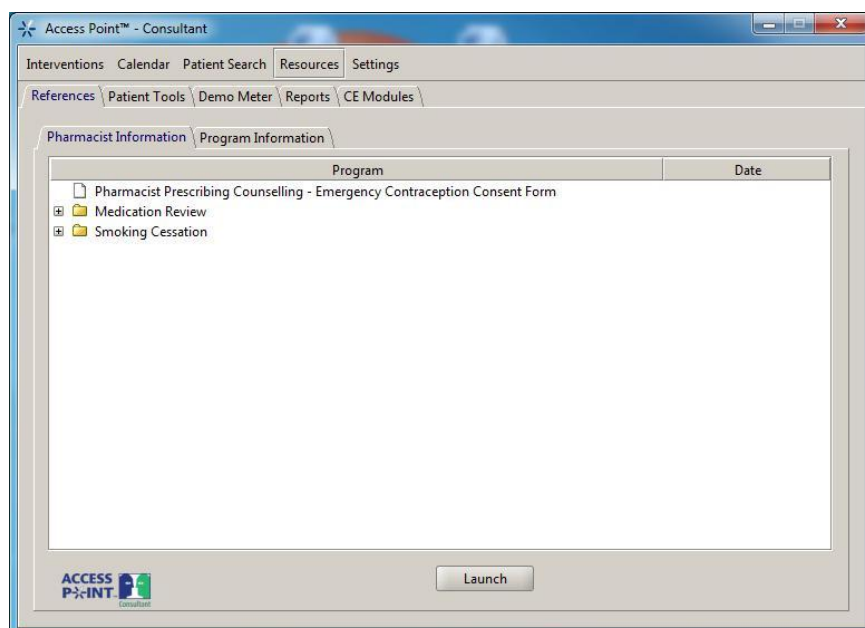| Patient View | Highlight the desired entry and select PATIENT VIEW to access the <u>Interventions</u> tab of the PATIENT VIEW for this patient. |

▶ Column order can be reorganized by the user by selecting a column and dragging it to a new position.

▶ Selecting any column header will sort the displayed interventions in the opposite order i.e. descending to ascending if previously displayed as ascending to descending.

▶ The column order and/or sort will reset to default when Access Point™ Consultant is restarted or when the DEFAULT button is selected.

PATIENT SEARCH SAMPLE PRINT OUTPUT

Last Name	First Name	Telephone #	Address	Birthdate
Doe	Sarah	416-555-5555	123 Pat Street	01/01/1942
Smith	Jane	905-555-8523	444 Test Drive Beeton	11/03/2012

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▶ The *Resources* facility is divided in (5) tabs as follows:

TAB	DESCRIPTION
References ▪ Pharmacist Information ▪ Program Information	Provides pharmacist reference material and program overviews in support of available programs.
Patient Tools	Provides education/information intended to support patients, as available.
Demo Meter	*For BGM Warranty and Registration program users only.* Provides a facility which allows the user to submit demo meters as authorized by a manufacturer representative for meter reimbursement. No Training Fees apply.
Reports	Provides all available in-store reports (performance, program tracking).
CE Modules	Provides the ability to view/print CE Modules, as available, print the test sheet, document user answers, and receive certification.

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►   Action buttons can include:

| View | All items in the listing are provided in pdf format. Highlighting the desired item and selecting VIEW will provide a screen view and opportunity to print. |

| Launch | All items in the listing include a Program Description Panel which provides additional instruction. Highlighting the desired item and selecting LAUNCH will the Program Description Panel. |

►   Documents in all tabs will be displayed alphabetically by program name then by grouped programs.

►   Column order can be reorganized by the user by selecting a column and dragging it to a new position.

►   Selecting any column header will sort the displayed materials in the opposite order i.e. descending to ascending if previously displayed as ascending to descending.

►   The column order and/or sort will reset to default when Access Point™ Consultant is restarted.

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▶ The *Settings* facility is divided in (4) tabs as follows:

HELP TAB
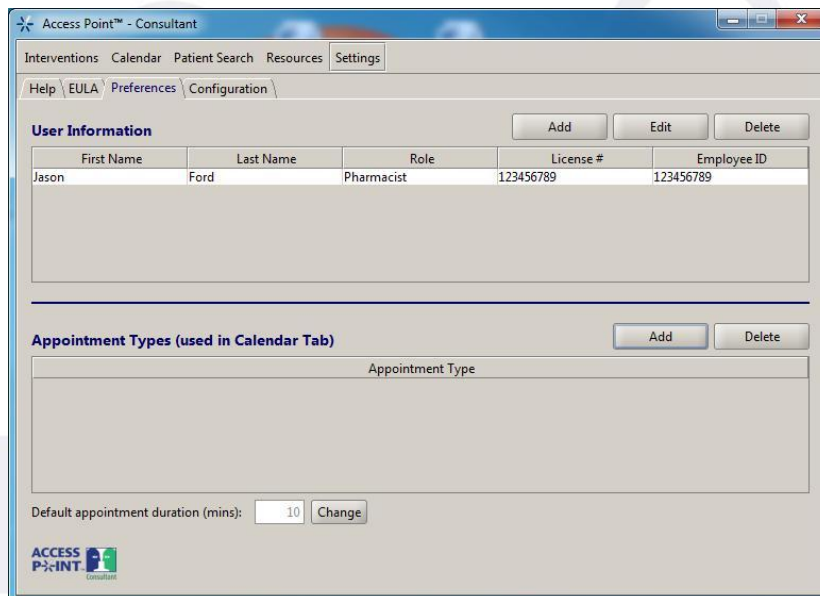
▶ Provides the user with support materials and our Customer Service contact information. By selecting one of the buttons on the tab, the user is provided with the opportunity to view and/or print the User Manual and Quick Start Guide. The Training Demo is for viewing only.

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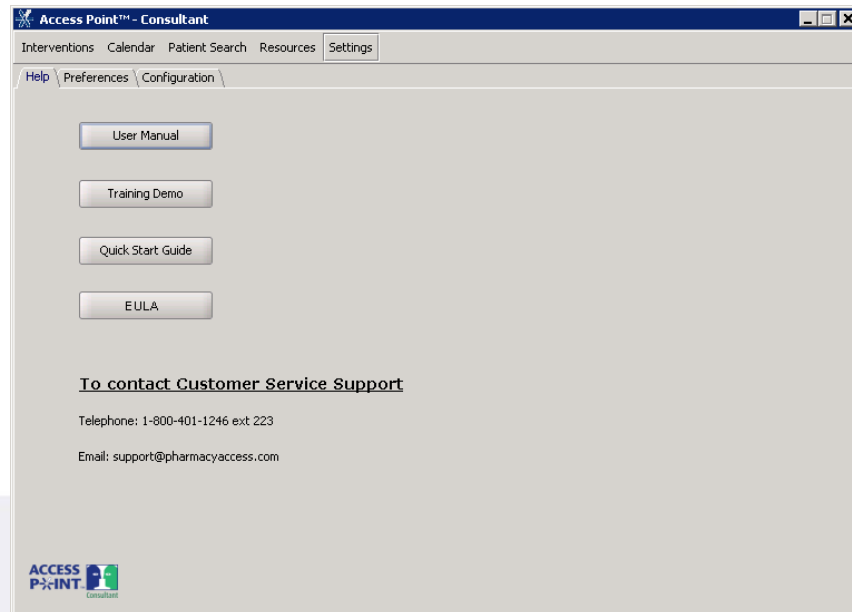
PREFERENCES TAB

Allows subscribed users to Add/Edit/Delete User Information and Appointment Types.

▶ User Information noted as "Pharmacist" will populate in the drop-downs for users with the Professional Services Module.

▶ Appointment Types will pre-populate as selections in the *Calendar* facility. Users can also adjust the Default appointment duration.
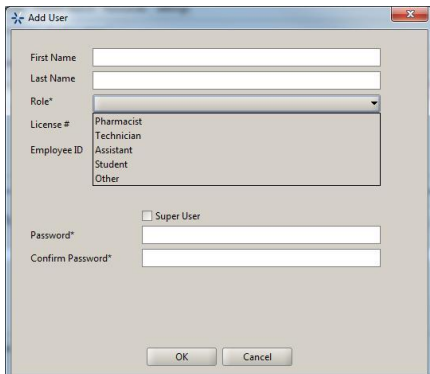
USER INFORMATION

▶ Function buttons include:

Add	Launches the Add User panel (See Add User panel).
Edit	Launches the Edit User panel for the highlighted listing (See Edit User panel).
Print	Allows the user to delete entries in the listing.

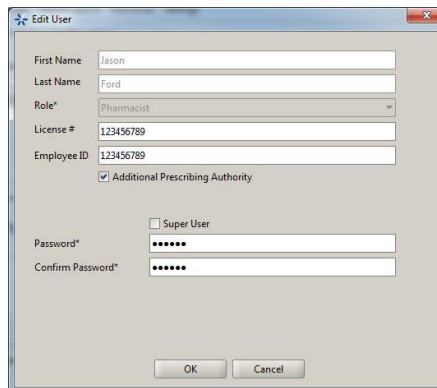PRIVATE & CONFIDENTIAL – NOT FOR DISTRIBUTION
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Add User Panel   **Edit User Panel**

Add User	**Edit User**
First Name	First Name: Jason
Last Name	Last Name: Ford
Role*	Role*: Pharmacist
License #	License #: 123456789
Employee ID	Employee ID: 123456789
Pharmacist / Technician / Assistant / Student / Other	☑ Additional Prescribing Authority
☐ Super User	☐ Super User
Password*	Password* ●●●●●●
Confirm Password*	Confirm Password* ●●●●●●
OK Cancel	OK Cancel

Ok   Accepts the addition/edit/deletion to user listing.

Cancel   Returns the user to the Preferences tab.
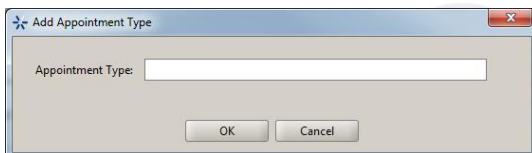

APPOINTMENT TYPES

► Function buttons include:

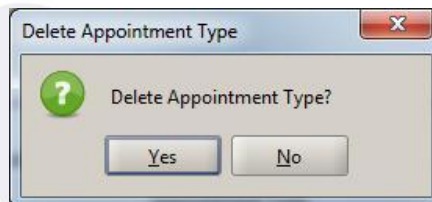**Add**   Launches the Add Appointment Type panel (See Add Appointment Type panel).

Delete   Launches the Delete Appointment Type panel (See Delete Appointment Type panel).

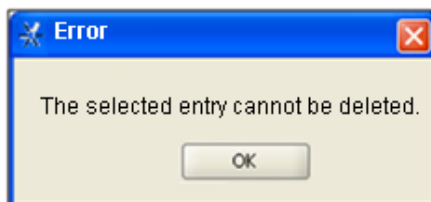|	
Add Appointment Type	**Delete Appointment Type**
Appointment Type:	❓ Delete Appointment Type?
OK Cancel	Yes No

OK   Accepts the addition/deletion to appointment listing.

Cancel   Returns the user to the Preferences tab.

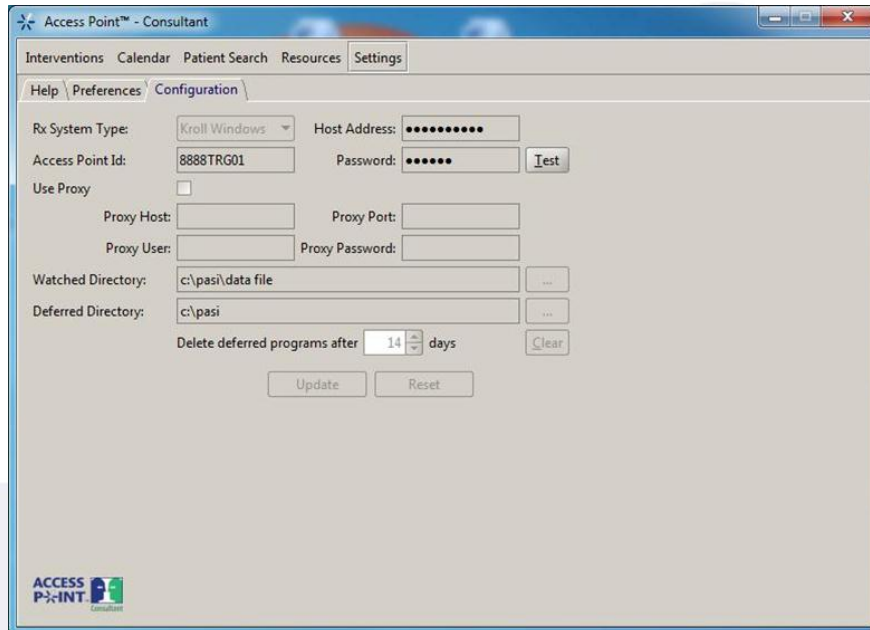► If the user attempts to delete a hard-coded Appointment Type entry, an error message will pop-up.

Error

The selected entry cannot be deleted.

OK

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CONFIGURATION TAB

▶   The Configuration tab is for use by PASI Customer Service. They will guide your use of this tab during the time of a Customer Service call.

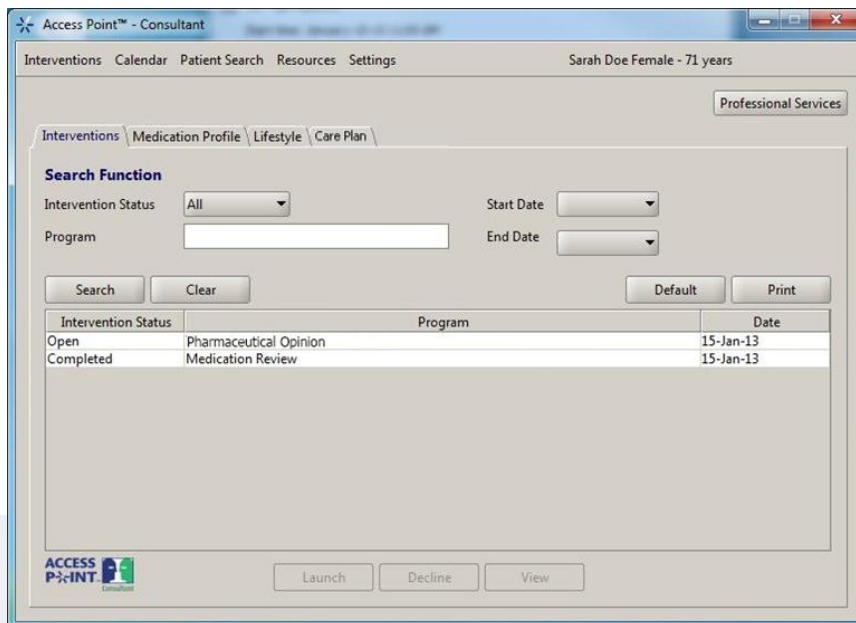▶   The Version and Set up areas of this screen are non-editable by default, as required.

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PATIENT VIEW

► PATIENT VIEW is initiated by selecting the PATIENT VIEW button from any facility. It is available to subscribed users only.

► PATIENT VIEW will display the Patient Name, Gender and Age as entered in their dispensing system profile on the top right hand corner of the panel. This information cannot be edited.

INTERVENTIONS TAB

► The Interventions tab of PATIENT VIEW is the default tab displayed when PATIENT VIEW is selected.

► The Interventions tab houses all open and completed interventions for the selected patient.

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SEARCH FUNCTION

▶ Function buttons include:

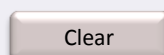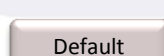|	
Search	Criteria entered by the user will be displayed when SEARCH or ENTER on the keyboard is selected.
Clear	Removes any search criteria and returns the listing to view all interventions.
Default	Clears any search criteria and resets the column order and sort to the default view.
Print	Provides a "preview [number of pages]" and allows the user to print a list of the currently displayed patients. If a search has been performed, the search results records will print.

▶ The user can perform a patient search using the following criteria:

- Intervention Status
- Program
- Start Date
- End Date

▶ The search functionality will utilize all field entries to perform the search (i.e. First Name "Me" and Last Name "RIB" will provide a list of all patient interventions that meet both search criteria).

▶ The user can display one or more open Professional Service interventions by selecting from the "Program" drop-down of the Search Function.

▶ Any entered search criteria will remain until the user selects CLEAR, DEFAULT or restarts Access Point™ Consultant.

INTERVENTIONS LISTING

▶   Action buttons include:

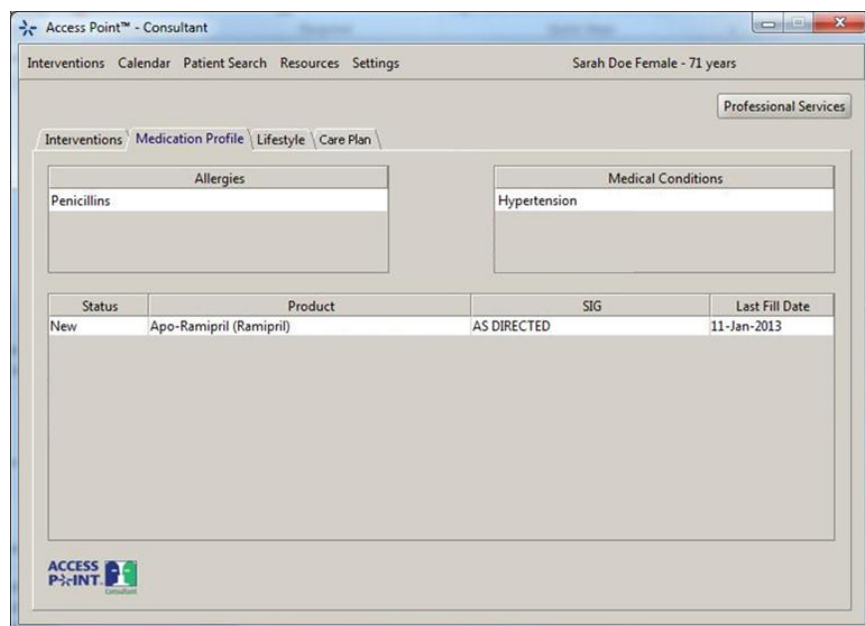|	
Launch	Highlight the desired intervention and select LAUNCH to open the Program Documentation Panel specific to the intervention.
Decline	Highlight the desired intervention and select DECLINE to remove the intervention from the listing.
View	For completed interventions only, highlighting the desired intervention and selecting VIEW opens a pdf copy of the selected document for viewing or printing.

▶   Entries will be displayed with the most recent open intervention at the top of the listing to least recent and then most recently completed intervention to least recent by default.

▶   Column order can be reorganized by the user by selecting a column and dragging it to a new position.

▶   Selecting any column header will sort the displayed interventions in the opposite order i.e. descending to ascending if previously displayed as ascending to descending.

▶   The column order and/or sort will reset to default when Access Point™ Consultant is restarted or when the DEFAULT button is selected.

INTERVENTIONS SAMPLE PRINT OUTPUT

Name: Sarah Doe

Intervention Status	Program	Date
Open	Medication Review	25/09/2012
Open	Pharmaceutical Opinion	24/09/2012
Open	Smoking Cessation	13/09/2012

MEDICATION PROFILE TAB

▶   Displays Allergies and Medical Conditions as retrieved from the patient's dispensing system profile.

▶   Displays the patient's Medication Profile as retrieved from the patient's dispensing system profile.

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LIFESTYLE TAB

▶ This tab allows the user to record non-medication indices for a specific patient. This tab may be customized in some retail environments.

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► The following information can be recorded:

   ▪ Smoker – drop-down box with Yes, No.

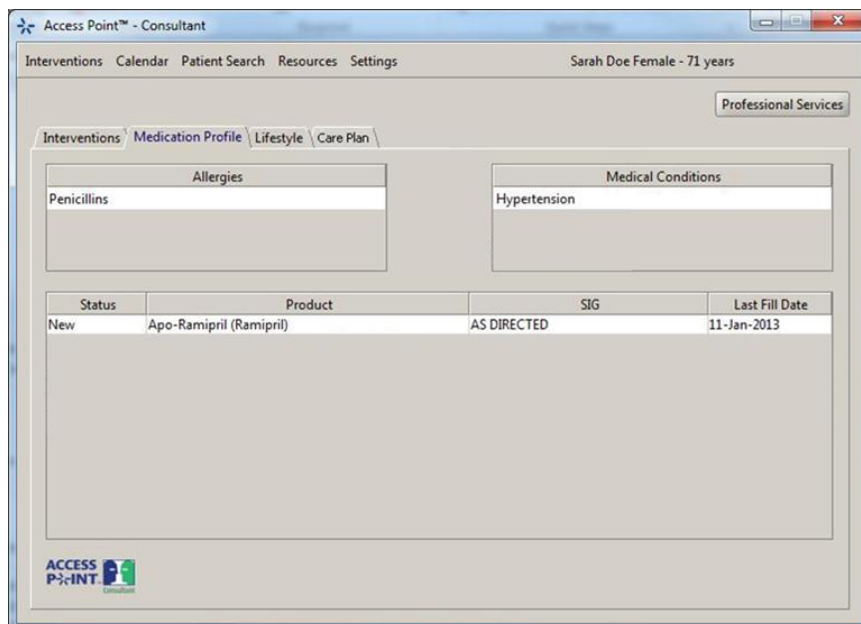   ▪ # cigarettes/day – drop-down box with options of 0-5, 6-10, 11-20, 21-40, >40

   ▪ # of years – drop-down box with options of 0-1, 2-5, 6-10, 11-25, >25

   ▪ Height – free form box plus drop-down menu with options of "cm" and "inches"

   ▪ Weight – free form box plus drop-down menu with options of "kg" and "lbs."

   ▪ BMI – calculated by Access Point™ Consultant based on entered height and weight

   ▪ Caffeine Use – drop-down box with options of <7, 8-14, 15-25, >25 drinks per week

   ▪ Alcohol Use – drop-down box with options of <7, 8-14, 15-25, >25 drinks per week

► Action buttons include:

   [Save]   Saves any information entered/updated within the Lifestyle tab.
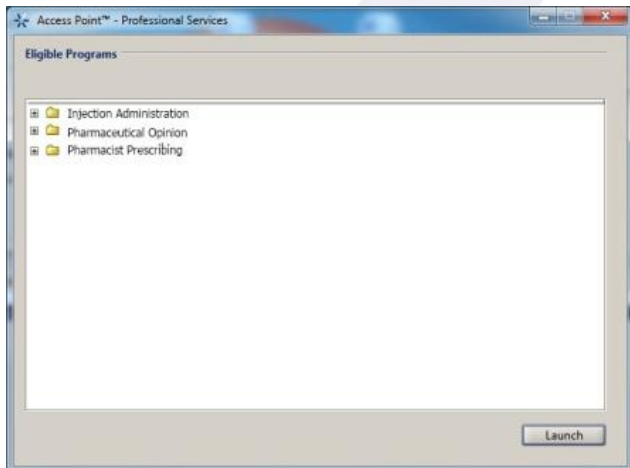
► Additional information may be included on the Lifestyle tab based on your individual store set-up.

► Information recorded in the Lifestyle tab is saved in Access Point™ Consultant and may be used to prompt program interventions and/or be populated on program outputs.
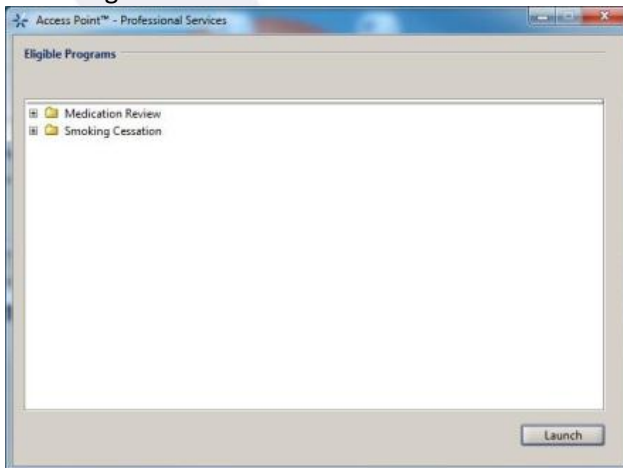
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▶ For subscribed users only. The user can initiate any Professional Service program ON DEMAND using the Professional Services button. Note: Selections reliant on payer status (such as ODB for Pharmaceutical Opinion) and/or province (i.e. not all services are available in each province) will be provided/removed as applicable.

Professional Services *requiring* a reference to a specific medication in order to initiate the service are listed in the following Professional Services panel. The user must select a medication from the patient's profile first and then the **Professional Services** button.

Professional Services that do ***not require*** a reference to a specific medication in order to initiation the service are listed in the following Professional Services panel. The user can select this list directly from the Patient View tab by selecting the Professional Services button.

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► Highlighting the applicable Professional Service and selecting launch will provide the documentation panel for the selected program. Documentation Panels associated with all Professional Services programs will step the user through the required documentation. It is the user's responsibility to ensure all documentation is completed and saved in accordance with provincial requirements.

► Refer to program specific documentation included in the *Resources* facility, Program Information tab.

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