

# Change of Ownership Package

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## Welcome to the PTS Family!

As your business continues to grow, PTS is here to provide comprehensive support for all your product and service needs.

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### Pharmacy Technology Solutions

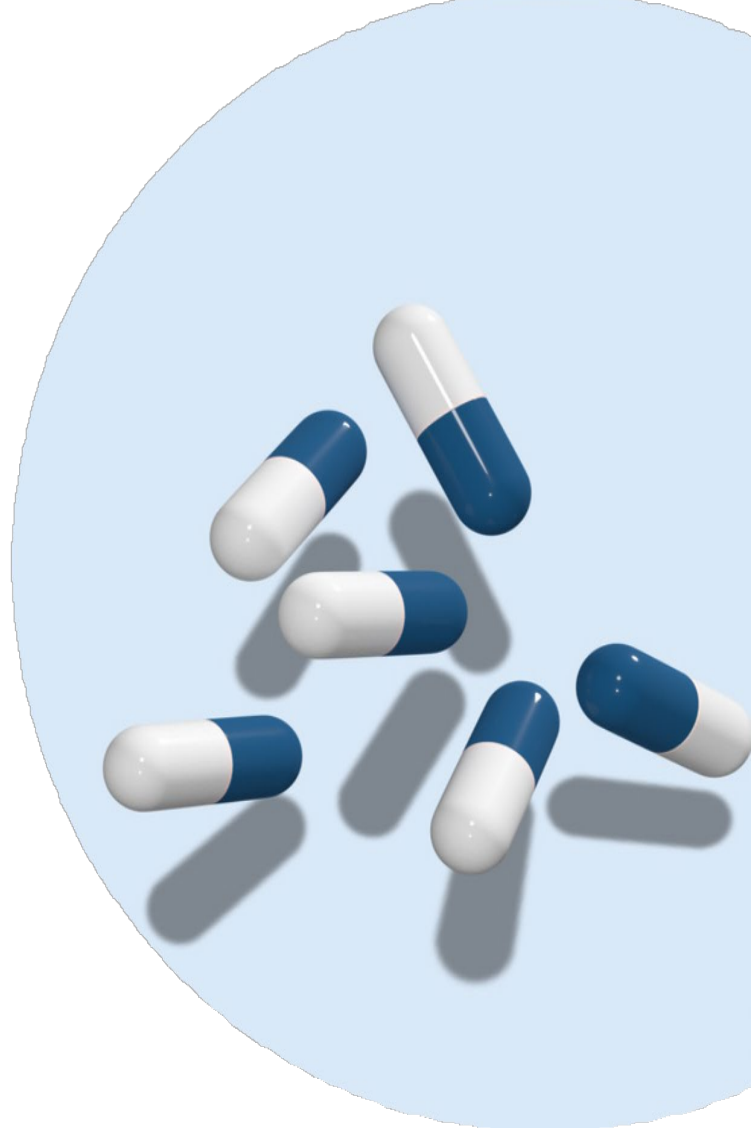
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# WELCOME

This guide contains key contact information, portal instructions, and useful tips to help get you started.

## IMPORTANT REMINDERS

- Contact your local College of Pharmacists to advise them of the change in ownership.
- If applicable, contact the provincial Drug Information System (DIS) team to advise them of the change in ownership.
- Apply for necessary third party provider numbers, as needed.
- Update the legal name of the pharmacy in PharmaClik Rx, Propel Rx and/or Propel POS (if required).
- Review PharmaClik Rx or Propel Rx system preferences and adjust as required.
- Review existing standard operating procedures for the pharmacy.
- Update the GST/HST number in Propel POS for the till receipts (if required).
- Review existing standard operating procedures for the front shop.
- When ordering pin pads for your POS system, consider ordering an integrated one for optimal performance.

## IMPORTANT CONTACTS

### PTS Customer Care

(Help when you need it)

**1-800-387-6093**

[ptscustomercares@mckesson.ca](mailto:ptscustomercares@mckesson.ca)

### PTS Sales

(Product & Services inquiries)

**1-800-387-6093**

**Option 5**

[ptssales@mckesson.ca](mailto:ptssales@mckesson.ca)



# SALES

As a new member of the PTS Family, you should already have been contacted by your PTS Sales Associate. Our Sales Associates conduct a full detailed account review of the existing services and monthly fees associated with your new pharmacy's account.

If you still have questions about your services, you can contact sales at [ptssales@mckesson.ca](mailto:ptssales@mckesson.ca) or **1-800-387-6093 Option 5**. For more information about our offerings, explore the [Product & Services Catalogue](#).

# CUSTOMER CARE & FIELD SERVICE

Customer service has always been a key part of what we stand for at PTS. We have over 60 employees dedicated to customer care and field service across Canada. Regardless of where your business is located, we are available to help when you need us.

## How to contact Customer Care and Field Service

We can be reached by phone at **1-800-387-6093**, and are available for critical incidents 24/7. You can also email non urgent requests to [ptscustomer care@mckesson.ca](mailto:ptscustomer care@mckesson.ca) or fill out this [form](#).

# LEARNING ABOUT OUR PRODUCTS

PTS offers training programs that cover both fundamental and advanced topics to help you make the most of your software. By mastering the basics, you can optimize your software usage. Training is offered both virtually and in person. Whether you prefer a classroom setting or on-site training at your pharmacy, we can meet your needs. Explore our training offerings for [Propel Rx](#), [PharmaClik Rx](#) and [Propel POS](#).

To help you get started, we offer a complimentary consultation session with one of our Software Trainers. During this session, you can ask any questions you have and receive recommendations on your next steps as a new owner. Our trainers can assist you with a range of topics from fee setting to providing an overview of current settings. To make the most of the session, we encourage you to prepare your questions in advance. Contact us at [PTSLearning@mckesson.ca](mailto:PTSLearning@mckesson.ca) to book your session today!



## INTRODUCING PROPEL RX

We're excited to introduce to you our newly enhanced pharmacy management software. Get a sneak peek of what's in store for you. The best of PharmaClik Rx and Nexxsys have been combined to create a single upgraded software platform known as [Propel Rx](#).

- Visit our Online Help [here](#).
- Check out our Propel Rx demo [here](#).

## PharmaClik Rx

- Some topics the trainer can assist with include resetting user passwords for PharmaClik Rx, reviewing your pricing structure, and reviewing reports currently scheduled to print.
- Visit our [PharmaClik Rx Online Help](#) to familiarize yourself with topics and access valuable resources such as job aids and videos on PharmaClik Rx.

## Propel POS

- Some topics the trainer can assist with will include sending and receiving a McKesson PharmaClik order, balancing the till, reviewing reports and checking your knowledge level. They can also review any security questions you may have.
- Both our [Retail Learning Academy](#) (eLearning platform) and our [Propel POS Online Help](#) contain eLearning, curriculum, job aids, and videos on Propel POS.

## Retail Learning Academy

During your review with the Trainer, they can also introduce you to the [Retail Learning Academy](#) and ensure you or your RLA Admin have the proper enrollment keys to give you access to any existing Propel Rx, PharmaClik Rx or Propel POS learning available on the RLA.

Will you have new staff? That's not a problem! They can enroll to complete the eLearning modules.

## Resources

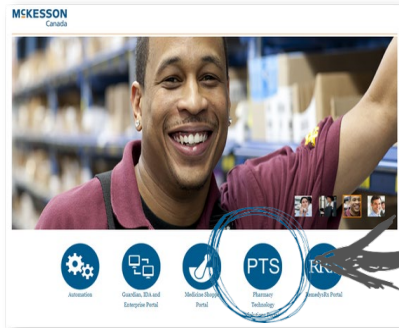
**PTS Portal** - The portal is a central place for valuable information. Click [here](#) to see for yourself.

**Videos to Watch** - Have a look at [past recordings](#). There are various topics that may be of interest to you.

**Retail Learning Academy (RLA) eLearning Curriculum** - Access the RLA Login page [here](#).

# PTS PORTAL

The PTS Portal is a secure web-based platform that provides the most relevant information for the PTS Community. The portal contains a wealth of knowledge ranging from guidance on pharmacy solutions and learning materials, as well as access to essential financial information.



## How to access the PTS Portal

You can access the McKesson Canada Portal at [portal.mckesson.ca](https://portal.mckesson.ca). If you are joining the PTS family for the first time, you will receive an email from PTS that contains your temporary password. Log in promptly to set your secure password. If you already have access to the **PTS Portal**, this new account will be added to your existing login. Access the PTS Portal [here](#).

If you haven't logged in yet, please do so within the next few days. Should you need help, our PTS Customer Care team is available. Be sure to tell them right away that you are calling about PTS Portal.

## Manage and give your entire team access

There is an abundance of learning information on the PTS Portal. It is imperative that your team is also granted access. Should you need assistance with this or any other PTS Portal related concerns, feel free to contact PTS Customer Care.

## Browse Resources

Take some time to browse the resources available on the PTS Portal, including:

- [How to Download and Save Financial Documents](#)
- [Learning Materials](#)
- [Learn how to grant access to your Team Members](#)
- [PTS Blog](#)
- [Contact Us](#)



# OWNERSHIP CHANGE CHECKLIST

The following checklist has been created to ensure you complete all the transitional tasks that are required to ensure both your Propel Rx and Propel POS systems are ready for your first day under new ownership.

Links are included for your convenience, but if at any time you require support, please contact the Customer Care team at 1-800-387-6093.



- ☐ [Change Legal Name](#)
- ☐ [Update Third party Provider Numbers](#)
- ☐ [Evaluate/Update Pricing Rules](#)
- ☐ [Review the list of Rx users](#)
- ☐ [Update McKesson Account Number](#)



If you require updates to your Propel POS account numbers or assistance with the items below, contact our Customer Care team at **1-800-387-6093 option 3** or

[ptscustomercare@mckesson.ca](mailto:ptscustomercare@mckesson.ca)

- ☐ [New McKesson Account Number and SAP Number](#)
- ☐ New GST/HST Number
- ☐ TD Merchant Number for integrated pin pads (if applicable)
- ☐ Blackhawk Gift card Account Number (if applicable)
- ☐ Givex Gift card Account Number (if applicable)

## INVOICES

Finding invoices is easy on the PTS Portal. You can access them through the **Reports** menu on the PTS Portal. If you are unable to locate your invoices, please contact Customer Care at 1-800-387-6093 Option 2, or by email at [ptscustomercare@mckesson.ca](mailto:ptscustomercare@mckesson.ca). Other invoice related questions should be directed to recurring revenue at [billing-pts@mckesson.ca](mailto:billing-pts@mckesson.ca). If you have inquiries related to a purchase invoice, contact [ar-pts@mckesson.ca](mailto:ar-pts@mckesson.ca).