

# Auto-Substitution



**Pharmacy Technology Solutions**

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# Auto-Substitution

McKesson to provide an auto-substitution opt-in program on PharmaClik.

- This program will automatically substitute **non Enterprise** formulary brands for the Primary Enterprise formulary brand (this does not include Brand Name drugs). It will also automatically substitute out of stock pack sizes to ones that are in stock.
- When substitution occurs on PharmaClik, PharmaClik Rx will automate the inventory setup.
  - This includes: monitoring non-monitored products, setting re-order parameters, and receiving the substituted product into inventory.
- Possible substitutions are: (i) DIN-to-DIN, or (ii) Same DIN, different Pack Size.

# Pointer Substitution Logic Defined

- Example scenario background:

Formulary Status	Item	Formats	Inventory@McKesson
Primary molecule	AVA-ATORVASTATIN 10MG	90's	100 <b>OR</b> zero <i>*both scenarios considered</i>
Fabricator	APO-ATORVASTATIN 10MG	90's, 100's, 500's	100 <b>OR</b> zero <i>*both scenarios considered</i>
Secondary	TEV-ATORVASTATIN 10MG	100's, 500's	100
Non-formulary	RAN-ATORVASTATIN 10MG	90's, 100's, 500's	1000
Brand	PFI-ATORVASTATIN 10MG	90's, 500's	500

# Pointer Substitution Logic Defined – Outside Ontario

- Example scenario substitution for ATORVASTATIN 10MG:
  - McKesson has inventory of primary AVA products.
  - Store is not located in Ontario and Avantra is active in province.

Stores Orders	If Primary item is in stock	If Primary item inventory is zero	If Primary & Fabricator inventory is zero
Primary molecule AVA	No subs	AVA 90's → APO 90's	AVA 90's → APO 90's → TEV 100's
Fabricator APO	APO 90's → AVA 90's APO 100's → AVA 90's APO 500's → AVA 90's	APO 90's → AVA 90's → APO 90's APO 100's → AVA 90's → APO 90's APO 500's → AVA 90's → APO 90's	→ TEV 100's → TEV 100's → TEV 100's
Secondary TEV	TEV 100's → AVA 90's TEV 500's → AVA 90's	TEV 100's → AVA 90's → APO 90's TEV 500's → AVA 90's → APO 90's	→ TEV 100's → TEV 100's
Non-formulary RAN	RAN 90's → AVA 90's RAN 100's → AVA 90's RAN 500's → AVA 90's	RAN 90's → AVA 90's → APO 90's RAN 100's → AVA 90's → APO 90's RAN 500's → AVA 90's → APO 90's	→ TEV 100's → TEV 100's → TEV 100's
Brand PFI	PFI 90's PFI 500's	PFI 90's PFI 500's	PFI 90's PFI 500's

# Pointer Substitution Logic Defined – Ontario

- Example scenario substitution for ATORVASTATIN 10MG:
  - McKesson has inventory of primary AVA products.
  - Store is not located in Ontario and Avantra is active in province.

Stores Orders	If Primary item is in stock	If Primary item inventory is zero	If Primary & Secondary inventory is zero
Primary molecule APO	No subs	APO 90's → TEV 100's	AVA 90's → TEV 100's → MCS
Fabricator n/a	n/a	n/a	n/a
Secondary TEV	TEV 100's → APO 100's TEV 500's → APO 500's	TEV 100's → APO 100's → TEV 100's TEV 500's → APO 500's → TEV 500's	→ MCS → MCS
Non-formulary RAN	RAN 90's → APO 90's RAN 100's → APO 100's RAN 500's → APO 500's	RAN 90's → APO 90's → TEV 90's RAN 100's → APO 100's → TEV 100's RAN 500's → APO 500's → TEV 500's	→ MCS → MCS → MCS
Brand PFI	PFI 90's PFI 500's	PFI 90's PFI 500's	PFI 90's PFI 500's

# Pharmacy Inventory Preferences

The screenshot shows the 'Pharmacy Inventory Preferences' dialog box. It contains several sections of settings:

- General Settings:**
  - Inv. Number Required When Reconcile P.O.
  - Automatic Re-order
  - Use Default Pack Size on Refills
  - Create Balance Owning Activities
  - Inventory Expiry Alert (days):
  - Auto Pick
  - Prompt for Change Pack
  - Allow Inventory Reallocation
  - Automatically Reconcile Owe Amounts with P.O.
- Purchase Order Received Prices:**
  - Validate Purchase Order Received Prices
  - Purchase Order Price Variance (%):
- Purchase Order Send:**
  - Validate Purchase Order
  - Quantities Over:
  - Dollar Value Over:
- Bottom Section:**
  - Allow Substitution Reconciliation

Buttons:

- A checkbox has been added to the existing **Pharmacy Inventory Preferences** window called: **Allow Substitution Reconciliation.**

- When this preference is *ON*, it will allow the user to receive substitutions and have them reported as substitutions on the **Auto-Reconcile Exceptions Report** as either **DIN** or **Pack Size Substitutions**.
- When this preference is *OFF*, the substitutions will not be reconciled and will be reported on the **Auto-Reconcile Exceptions** report as Invoice Exceptions.

# Receiving Substitutions

- PharmaClik Rx can determine if the substitution is for the same DIN or a different DIN. When substitution is for a received product that is **not** monitored PharmaClik Rx will:
  1. Set the **Monitor** flag = ON.
  2. Set the **Re-Order** point to match the **Re-order** point of the original ordered item's default pack size for the **Pack Size** substitutions or the **Primary Interchangeable's** default pack size for DIN Substitutions.
  3. If the default pack size of this reference item is not monitored, then the received item's **Re-Order** point is set to 50% of the Pack Size (e.g. pack size 100 would be 50).
  4. Re-Order # Packs = 1.
  5. **Do Not Re-Order** flag = OFF.
- When substitution exists in the invoice file and the received product is already monitored (Monitor = ON), no changes are required for the re-order parameters and item is received as per the usual reconciliation process.

# Auto-Reconcile Exceptions Report

- There will be two parts to the **Auto-Reconcile Report**:
  - **Auto-Reconcile Exceptions – Action Items.**  
Lists substituted items that could not be reconciled and substituted items that were set to monitor and had the re-order point entered by PharmaClik Rx.
  - **Auto-Reconcile Exceptions Report**  
Continues to list Invoice Exceptions, Purchase order Exceptions and Backorders. In addition it will now list **Pack Size** and **DIN** substitutions that were reconciled with no changes to re-order parameters.



# Auto-Reconcile Exceptions Action Items

## Auto-Reconcile Exceptions - Action Items

Pro Pharmacy  
131 McNabb St  
Markham, Ontario L3R 5V7

Nov 23, 2010

**PACK SIZE SUBSTITUTIONS:** Products were received as pack size substitutions. Review substitutions and make adjustments to the Drug folder manually as required.

**DIN SUBSTITUTIONS:** Products were received as DIN substitutions. Review substitutions and make adjustments to the Drug folder manually as required.

P.O. #: 00012345      Supplier: McKesson      Invoice #: 454454      Applied Date: Nov 23, 2010

Type	Item#	DIN	Description	Qty Shipped	Notes
Pack Size Substitution	319871	2280396	APO SIMVASTATIN TB 40MG	1	Product could not be reconciled. Update product manually.
Pack Size Substitution	107573	2280396	AVAPRO 150MG	1	Product could not be reconciled. Update product manually.
DIN Substitution	264861	2280396	APO-ACEBUTOLOL 200MG	1	Product could not be reconciled. Update product manually.

P.O. #: RX00012345      Supplier: McKesson      Invoice #: 454454      Applied Date: Nov 9, 2010

Type	Item#	DIN	Description	Pack Size	Inv #	Notes
Pack Size Substitution	107573	2280396	AVAPRO 150MG	90	1	Re-order parameters have been set: Re-Order Point of 45, Re-Order # packs of 1. Review re-order parameters
DIN Substitution	264861	2147610	APO-ACEBUTOLOL 200MG	500	1	Re-order parameters have been set: Re-Order Point of 250, Re-Order # packs of 1. Review re-order parameters

# Auto-Reconcile Exceptions Report

Auto-Reconcile Exceptions Report							
Pro Pharmacy 131 McNabb St Markham, Ontario L3R 5V7				Date: Nov 9, 2010			
<b>INVOICE EXCEPTIONS:</b> The following products are included in the invoice file, but do not exist in the purchase order or could not be reconciled from the file. Manually adjust these products in the Drug folder after the purchase order is reconciled.							
<b>PURCHASE ORDER EXCEPTIONS:</b> The following products are included in the purchase order, but were not updated by the invoice file. Review and adjust these items in the purchase order before reconciling, otherwise they will be reconciled '0' received and will not be reordered.							
<b>BACKORDERED PRODUCTS:</b> Products flagged for backorder by supplier.							
<b>PACK SIZE SUBSTITUTIONS:</b> The following products were received as pack size substitutions. Products will be reconciled.							
<b>DIN SUBSTITUTIONS:</b> The following products were received as DIN substitutions. Products will be reconciled.							
P.O. #: 12345RX    Supplier: McKesson    Invoice #: 454454    Applied Date: Nov 9, 2010							
<b>INVOICE EXCEPTIONS</b>							
Item#	DIN	Description	Qty Shipped	Pack Price	Notes		
89409	28347	SULAMYD SOD 10% OT/OTH 3.5G	3	3.86	Item discontinued by manufacturer		
<b>PURCHASE ORDER EXCEPTIONS</b>							
Item#	DIN	Trade Name	Strength	Form	Pack Size	Inv #	Ordered Qty
374850	2190915	LOSEC	20MG	TABLET, DE	28	1	4
<b>BACKORDERED PRODUCTS</b>							
Item#	DIN	Trade Name	Strength	Form	Pack Size	Inv #	Backordered Qty
512822	2230714	LIPITOR	40MG	TABLET, DE	90	1	4
<b>PACK SIZE SUBSTITUTIONS</b>							
Item#	DIN	Description	Qty Shipped	Pack Size	Inv #	Notes	
991349	2244577	APO-AMOXI 250MG	1	500	1	Products will be reconciled.	
<b>DIN SUBSTITUTIONS</b>							
Item#	DIN	Description	Qty Shipped	Pack Size	Inv #	Notes	
107482	865397	APO-ALPRAZ 0.25MG	2	100	1	Products will be reconciled.	

- The **Auto-Reconcile Exceptions Report** is an existing report that will now display **Pack Size** and **DIN** substitutions.
- The purchase orders on the report will be listed in ascending order based on the P.O. # for each section.
- The **Auto-Reconcile Exceptions – Action Items** and **Auto-Reconcile Exceptions** will print automatically when a McKesson invoice file is applied and there is data that qualifies for the report.