McKESSON Canada

PharmaClik Rx Central Fill ADI Inventory

User Guide

Last Updated: March 2, 2017

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1. Centralized Prescription Filling (Central Fill)

Background

The **Automated Dispensing Interface (ADI)** provides integration between the PharmaClik Rx system and automated medication dispensing devices. For further details on how to use ADI, refer to the *Automated Dispensing Interface User Guide*.

ADI Central Fill is an enhancement made to the ADI application to send and receive ADI files. By creating ADI output files and transmitting to a remote ADI, stores under one umbrella can package their medications in one central location or stores that do not have device can use another store's device.

The ADI output files contain information about drug, patient, group, dosage and admin times, etc., that are required to package the medication.

When the ADI **Central Fill** feature is turned on, the receiving pharmacy is set up as the ADI server (aka Central Pharmacy) for receiving and processing other store's ADI prescriptions; likewise, the originating or remote pharmacy is set up as an ADI client (aka Satellite store) which will send ADI prescriptions to the ADI server for fulfillment.

Inventory Enhancement

The **ADI Central Fill** feature has been enhanced so that inventory counts can be maintained accurately at both satellite and central locations. When the **ADI Central Fill Inventory** feature is turned on, prescriptions which are filled at the satellite pharmacies will **not** decrement inventory in the PharmaClik Rx shipment details.

The following sections describe at a high level the various enhancements made to the **Central Fill** functionality to accommodate for Inventory

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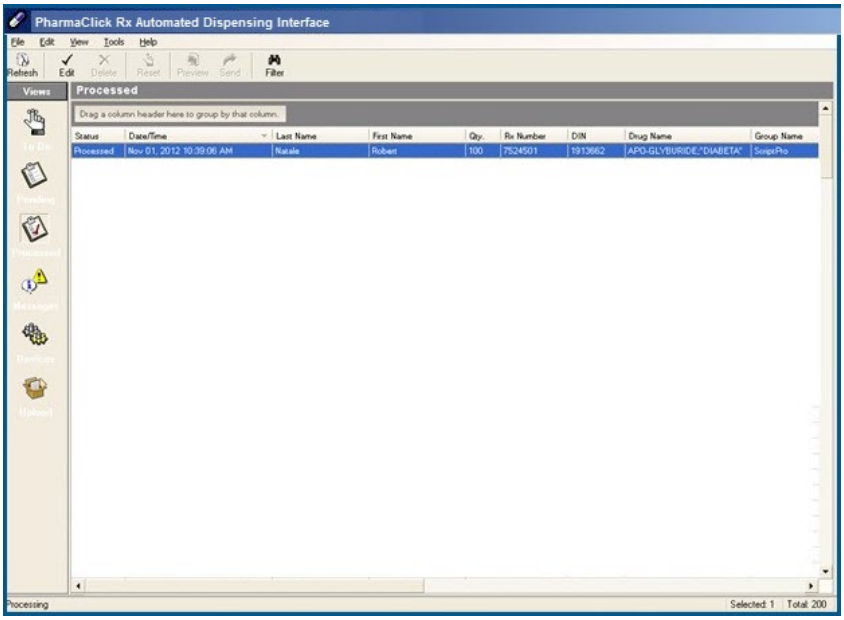
2. Satellite Pharmacy (Originating Pharmacy)

ADI Processed View - ScriptPro (Retail Device)



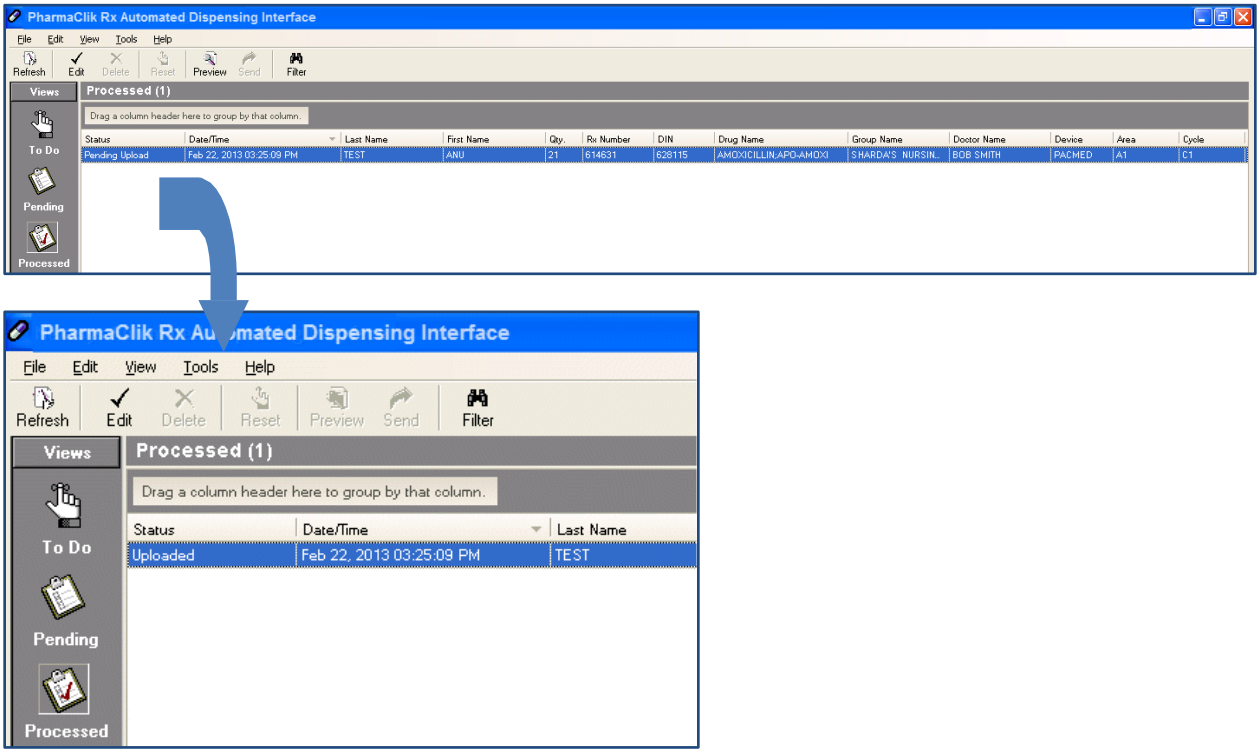
Prescriptions entered in PharmaClik Rx and flagged to be fulfilled with a ScriptPro (retail) automated dispensing device directly appear in the **Processed** view of the local ADI application, with a status of **Processed**.

NOTE: No user intervention is required to upload or send the prescription or file to the central pharmacy.

ADI Processed View - Pacmed (Non-Retail Device)

Prescriptions entered in PharmaClik Rx and flagged to be fulfilled with a PACMED (non-retail) automated dispensing device continue to appear in the **To Do** view of local ADI application. When the prescription is sent to the device, as per existing process, the prescription is moved into the **Processed** view.

The **Processed** view in the satellite ADI has been modified to indicate whether the prescription transaction has left the satellite location (e.g. uploaded to the sFTP). The status of the prescription changes from **Pending Upload** to **Upload** once the file has been uploaded.



Additionally, a prescription with an ADI status of Uploaded, that is subsequently refused/cancelled in PharmaClik Rx changes from an **Uploaded** status to **Reversal Sent**.

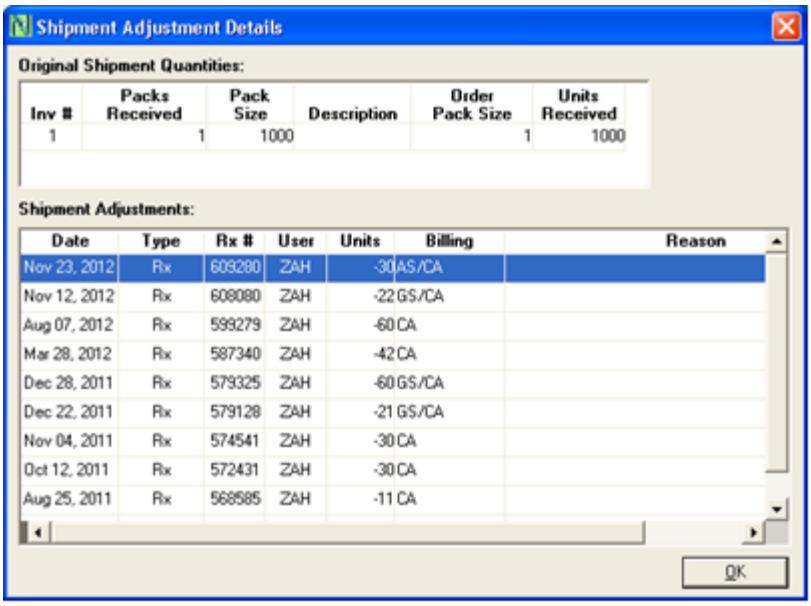
When a prescription is refused from the satellite PharmaClik Rx (that has already been uploaded), the user must continue to inform the central location that the prescription has been cancelled and no longer required for packaging. Inventory however, is automatically adjusted in the central PharmaClik Rx system once the next file is received.

NOTE: Reversals (for inventory) are automatically uploaded from the satellite ADI, so that inventory can be adjusted appropriately at the central site. However, this does not remove the original transaction that was sent to the device for packaging.

Satellite Pharmacy Inventory

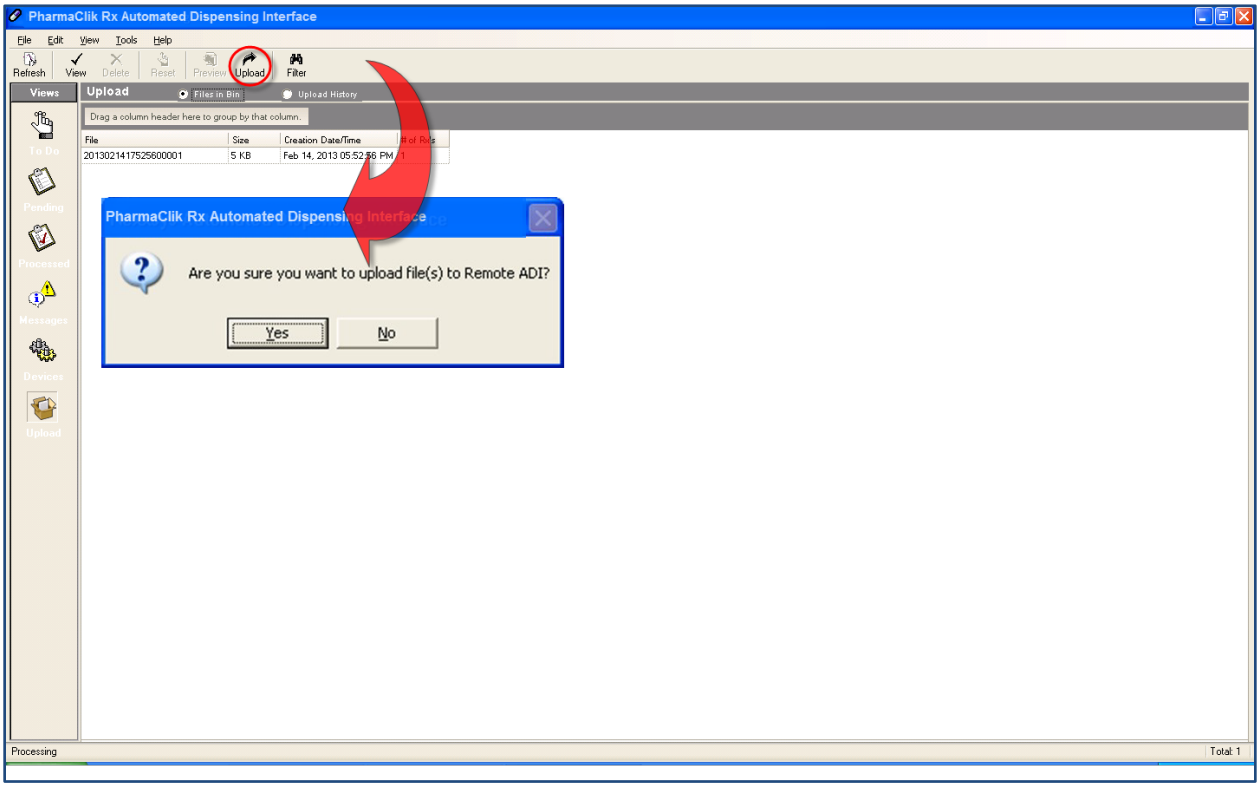
Inventory will not be decremented at the Satellite location for the prescriptions which are transmitted to another pharmacy for packaging.

No entry is made into the **Shipment Adjustment Details** within the satellite PharmaClik Rx system for the prescription that has been flagged for a device.



3. Transmitting Files

Files are transmitted from the Satellite pharmacy to the Central pharmacy via secure FTP (sFTP).For non-retail devices, such as PACMED the user is required to initiate the upload of the files by selecting the **Upload** button.



For retail devices, such **as ScriptPro** the user is not required to initiate the upload of the files. Instead, prescriptions flagged to be fulfilled by a **ScriptPro** device in a central fill environment are automatically uploaded.

4. Central Pharmacy (Receiving Pharmacy)

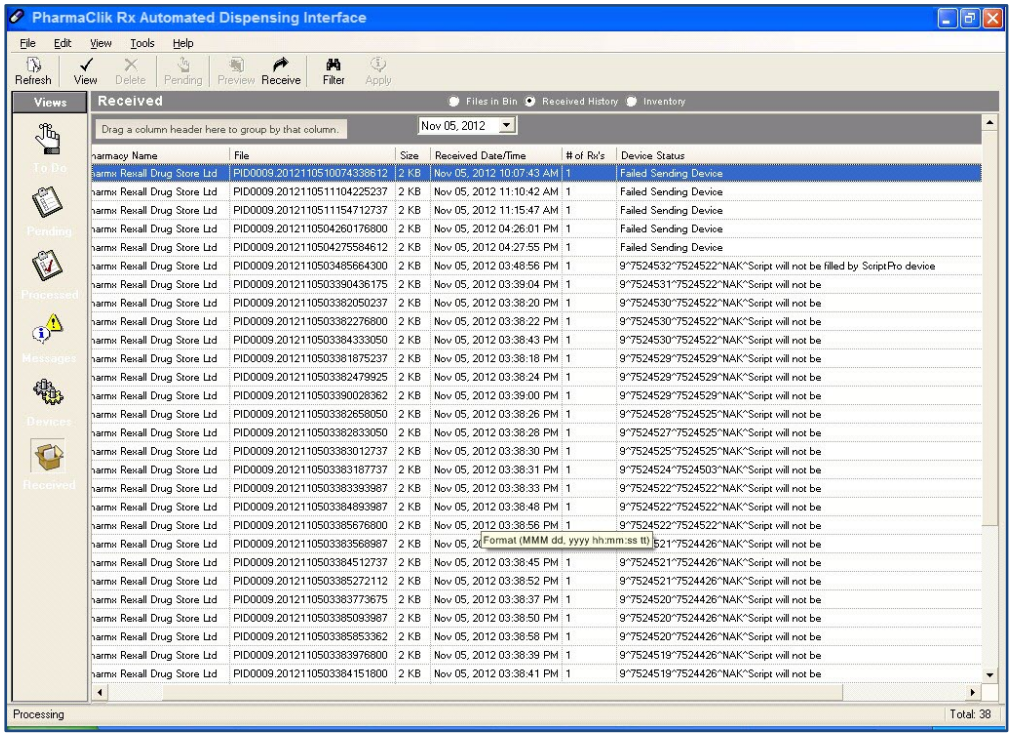
When a file is received into the **Central ADI**, there are multiple functions that occur simultaneously.

1. The file is sent over to the device for packaging
2. PharmaClik Rx inventory adjustments are attempted

Central ADI Received View – ScriptPro

Transactions received by the **Central ADI** are listed in the **Received History** tab and indicate the applicable pharmacy information from where the file was received. The **Device Status** column details if the file was received by the **ScriptPro** device.

The following types of responses can be returned by the **ScriptPro** device:



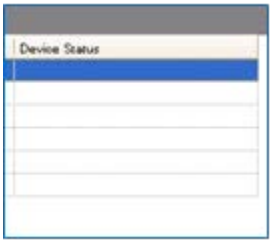
ACK – Acknowledgment

NAK – Prescription will not be filled by ScriptPro device

Error – corrupt file

Central ADI Received View – Pacmed

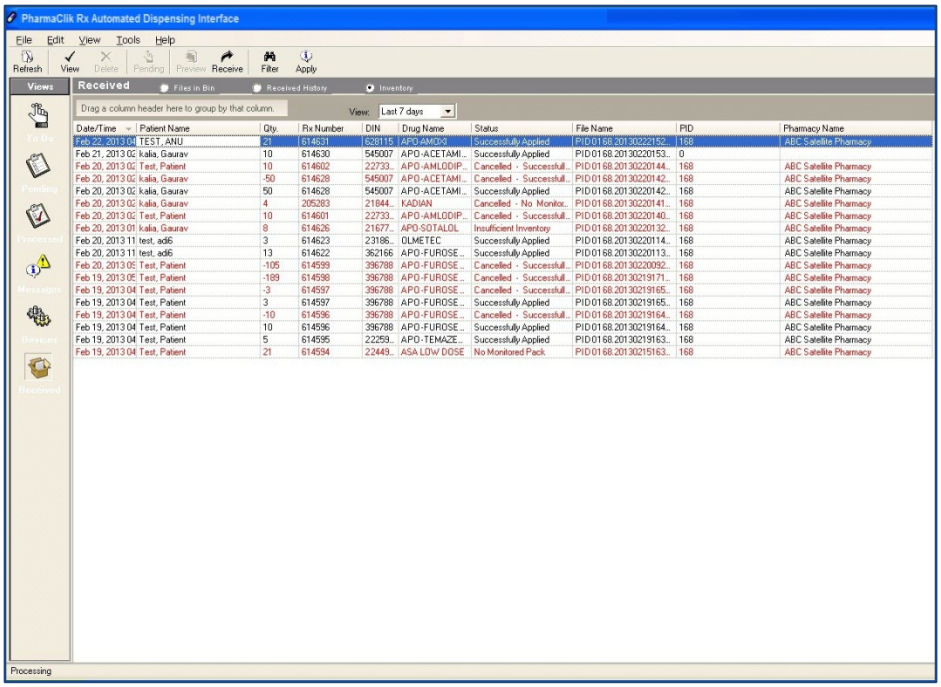
Transactions received by the **Central ADI** are listed in the **Received History** tab, however for Pacmed transactions the **Device Status** column is not relevant and will remain blank.



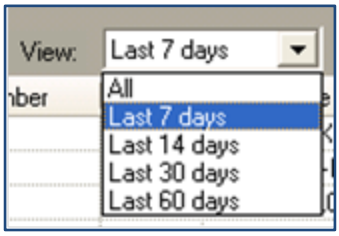
Central ADI Inventory

A new Inventory tab has been added to the **ADI Received** view, which lists all applicable prescriptions that have been received by the Central Pharmacy.

By default the view lists the archived transactions for the last 7 days, but the view can be expanded to show older transactions by selecting one of the other options in the dropdown:

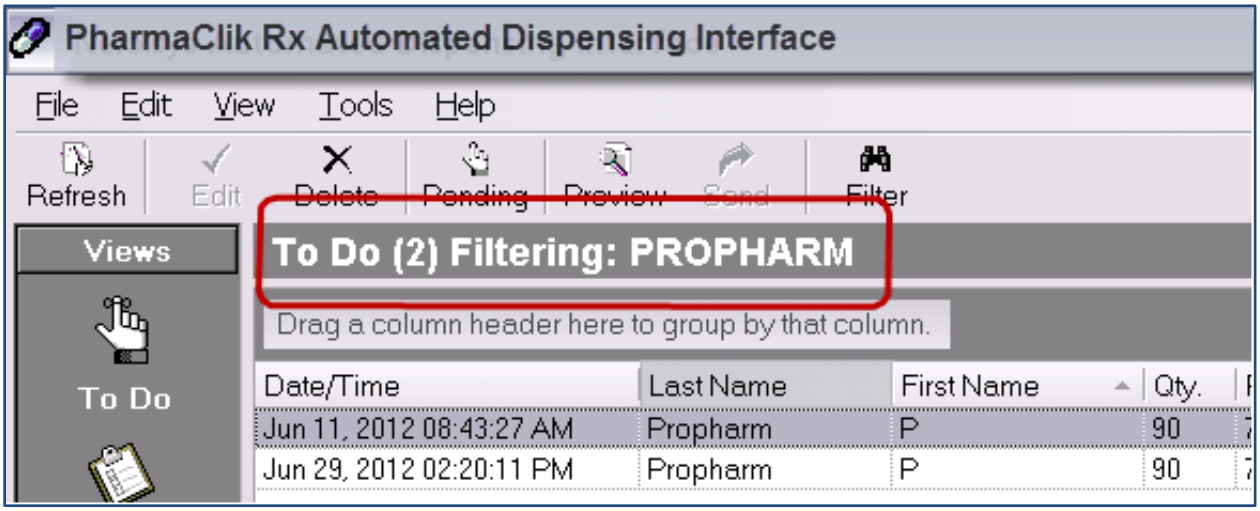


- All
- Last 7 days
- Last 14 days
- Last 30 days
- Last 60 days

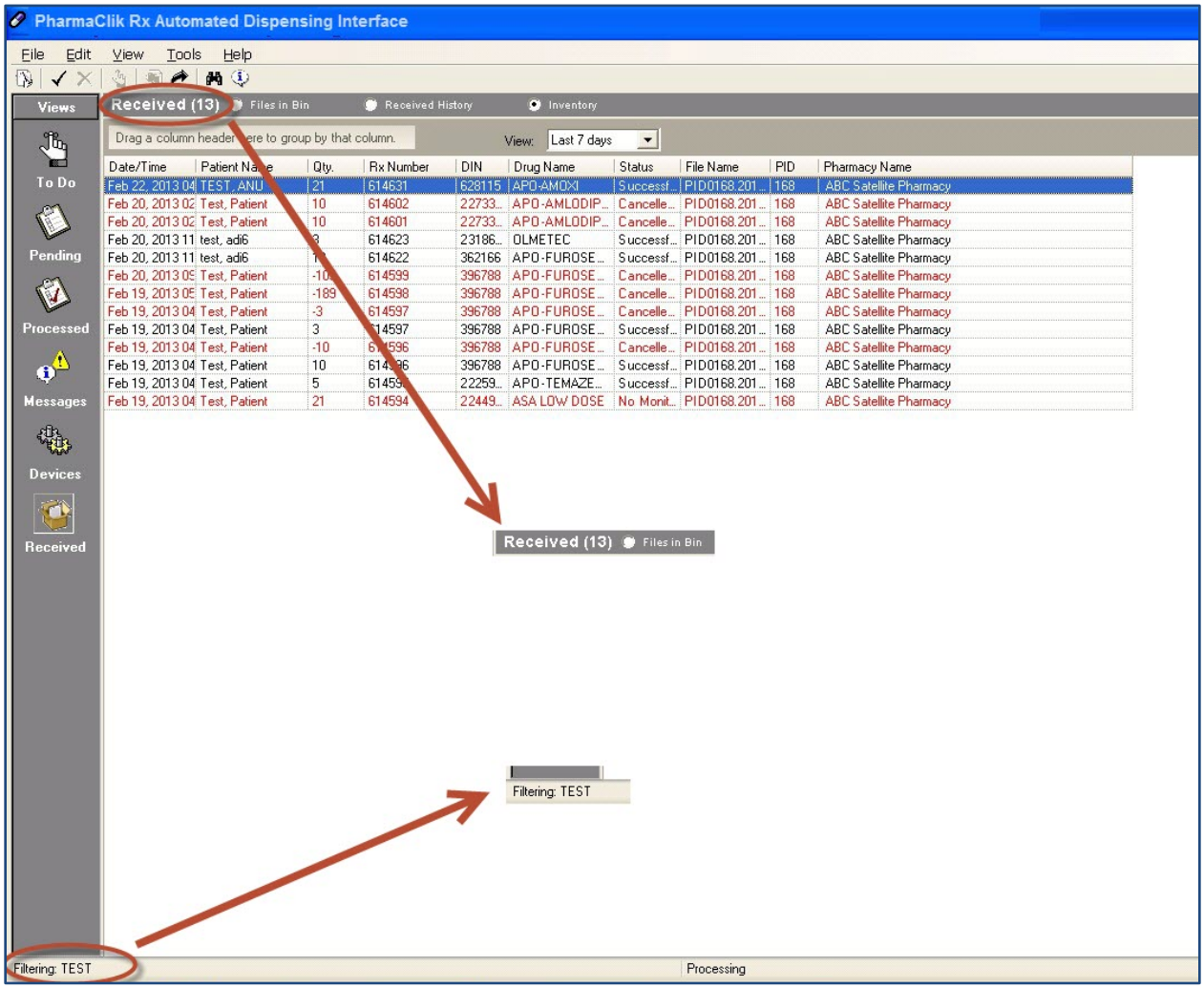


In order to accommodate for the new ADI Inventory view, the existing Filter functionality has been modified. When a filter is set in the ADI view, the filtered criteria is no longer displayed in the ADI header, but instead is now shown at the bottom left of the screen. The filter count however, will continue to display in the header.

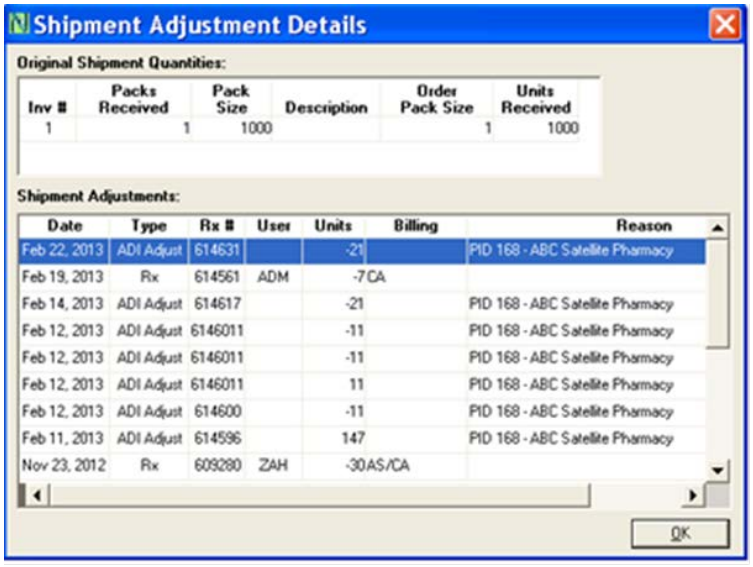
Example of the previous **Filte**r functionality:



Example of new **Filter** functionality:



When a file is received, inventory adjustments are attempted to be decremented from the main monitored pack size of the applicable DIN for the prescription.



A row is inserted into the **Shipment Adjustment Details** window and populated with the following information:

Date

Type = ADI Adjust

Rx# = Satellite prescription #

Units decremented

Reason = populates with the Satellite ID# and Pharmacy Name.

Inventory Status

The status of the Inventory adjustment can vary dependent on whether sufficient inventory exists in the Central PharmaClik Rx system. The following is a list of possible Inventory Status':

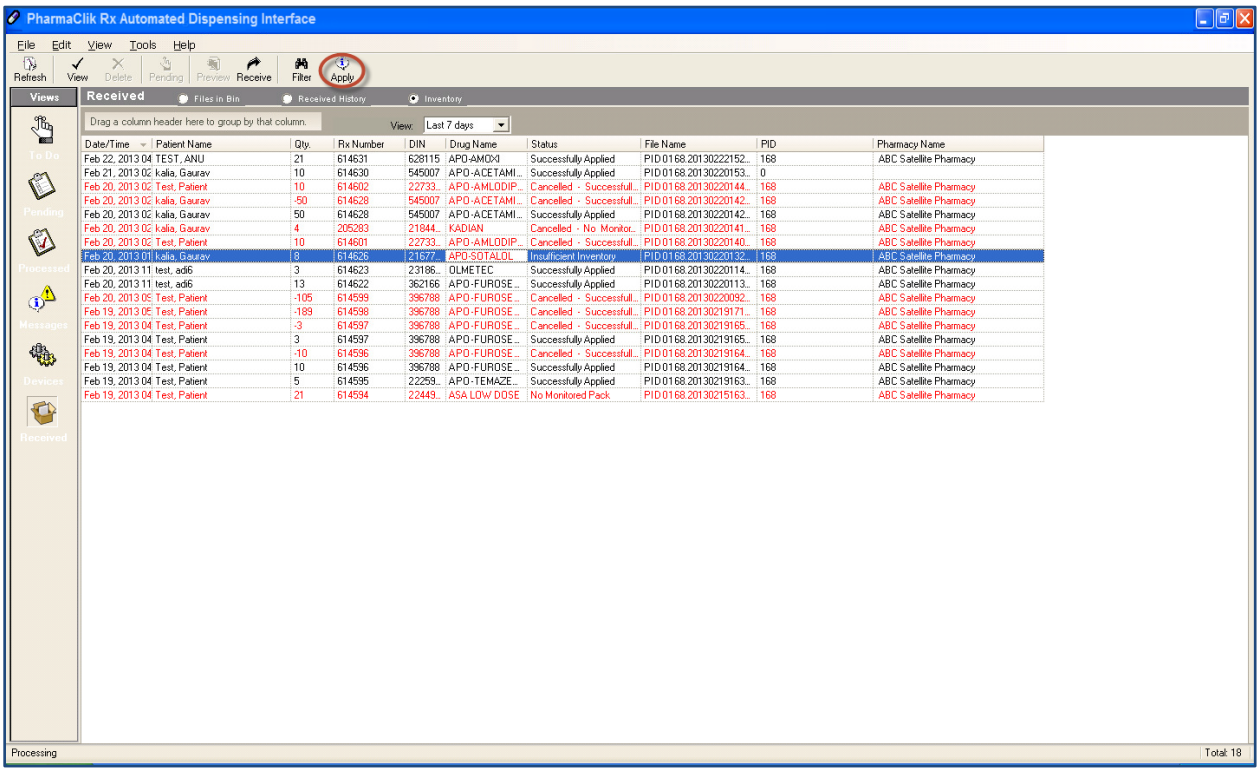
Inventory Status	Appears if…
Successfully Applied	Sufficient on hand amount exists for the main monitored pack size for the DIN, and inventory is successfully decremented.
No Monitored Pack	There is no main monitored pack size for DIN for the prescription which has been sent over to the Central ADI.
Insufficient Inventory	Inventory cannot be decremented due to not enough on hand for the main monitored DIN.
Cancelled - Successfully Applied	The prescription is cancelled/refused at the Satellite location, and inventory is successfully added back.
Cancelled - No Monitored Pack	The prescription is cancelled/refused at the Satellite location, and inventory for the original transaction was not decremented because there were no monitored pack sizes for the main inventory.
Cancelled - Insufficient Inventory	The prescription is cancelled/refused at the Satellite location, and inventory for the original transaction was not decremented because there was insufficient inventory for the main inventory.
Queued	A file has been received, but the PharmaClik Rx inventory adjustment is still in progress. This may be displayed when receiving large files with multiple transactions.

- When a prescription is cancelled/refused at the satellite location for a transaction that has already been received at the Central ADI, the inventory is added back in the Shipment Adjustment details and an additional row inserted into the ADI Inventory view for the cancellation. For inventory transactions that were not successfully applied (e.g. No Monitored Pack or Insufficient Inventory), the original row in the Inventory view is updated to indicate Cancelled.

Applying Inventory

- Inventory which has not been decremented in PharmaClik Rx as a result of Insufficient Inventory is automatically attempted the next time a file is received, provided the issue of insufficient inventory has been addressed.

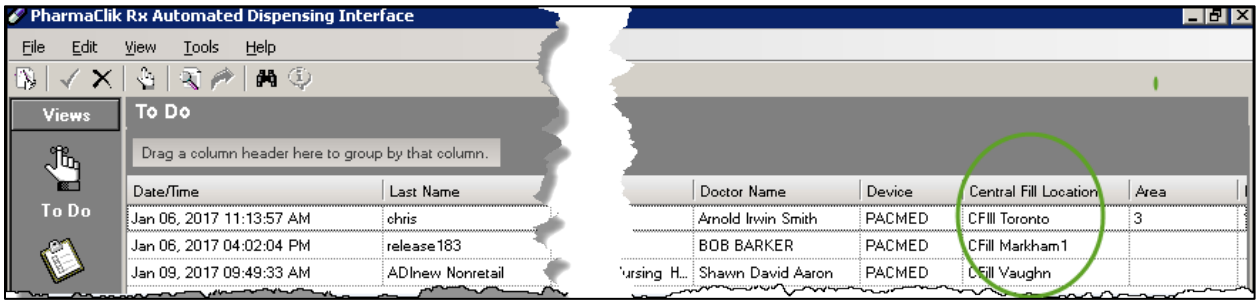
- Inventory which has not been decremented in PharmaClik Rx due to **No Monitored Pack** requires the user to flag the appropriate pack size for the DIN as Monitored and then manually apply those rows so the inventory is decremented.



5. Configuring Multi-Location Multi-Device

Background

Pharmacies can allow Central Fill to function at a central site that has multiple devices, or a satellite site that can upload to multiple central sites, each with their own devices. This capability permits pharmacies to quickly adapt and redirect their prescriptions to another location, if necessary.



Viewing Active Central Fill Locations & Devices

The **ADI Central Fill** feature has been enhanced so that inventory counts can be maintained accurately at both satellite and central locations. When the **ADI Central Fill Inventory** feature is turned on, prescriptions which are filled at the satellite pharmacies will **not** decrement inventory in the PharmaClik Rx shipment details.

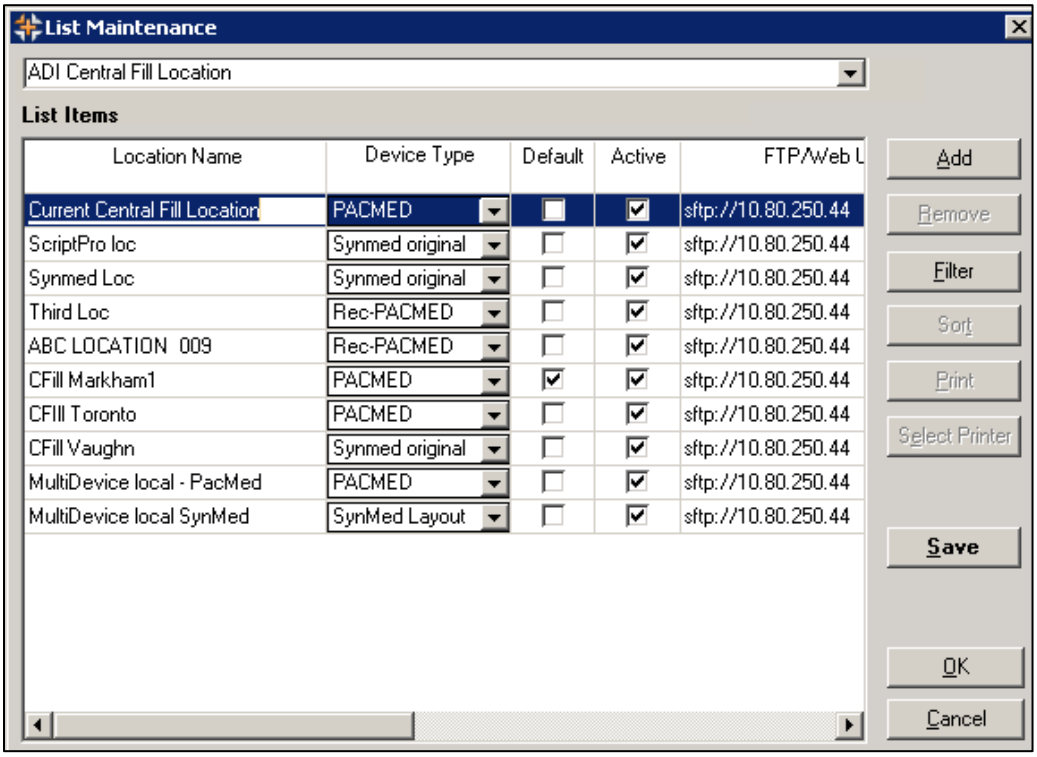
The following sections describe at a high level the various enhancements made to the **Central Fill** functionality to accommodate for Inventory

All Central Fill locations will be located in the **ADI Central Fill Location** table within List Maintenance. Users will have the ability to view active Central Fill locations, as well as the dispensing device for each specific location.

NOTE: If your pharmacy wishes to add another Central Fill location, contact the PTS Customer Care team. We will add the new location for you.

To view the Central Fill locations your pharmacy currently has on file:

1. Select **More** > **List Maint**.
2. Select **ADI Central Fill Location** from the dropdown menu. All active locations will appear in this list.



Setting Central Fill Location and Device Preferences

Pharmacies can change the Central Fill Location and/or device from 3 different windows:

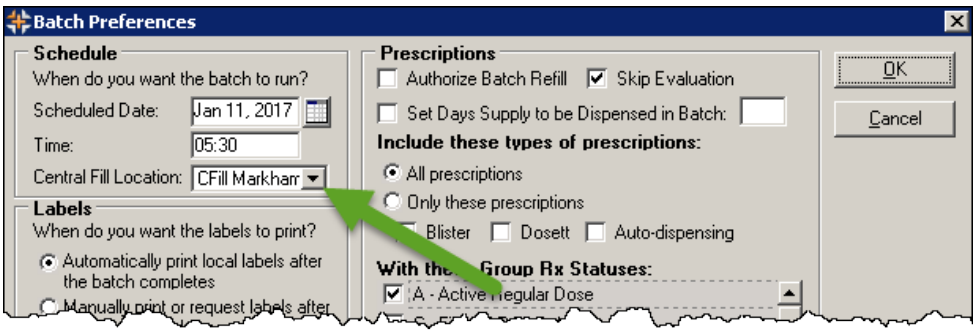
- Batch Preferences
- Group Auto-Dispensing Preferences
- Rx Detail – Administration Details

Batch Preferences

Users will have the ability to set a batch preference to be able to change Central Fill Locations at the time a batch is being set. This preference will assist in the case where one Central Fill location is down and the store needs to redirect to another Central Fill location.

By default, the *Central Fill Location* dropdown will be populated with the Central Fill Location set up in the Group Auto-Dispense Preference.

All prescriptions within the batch will have the Central Fill Location change/set in Rx Detail - Administration Details window as set in the Batch Preferences window. If a change is made, it will only apply to this batch as the new evaluation process will always evaluate what is set in the Group level preference.



To modify the Central Fill location from the Batch Preferences window:

1. Open the Batch Preferences window.
    - If you already have a batch scheduled, select **Rx** > **Batch**.
    - If you do not have a batch scheduled, select the **Refill** button from the Workbench, enter the criteria for the group you to view preferences for, and select the **Schedule** button.
2. In the *Schedule* groupbox, select the location you wish to send your Central Fill file to from the **Central Fill Location** dropdown menu.
3. Select the **OK** button.

NOTE: The Location dropdown will be greyed out if Central Fill is not activated at your pharmacy.

Group Auto-Dispensing Preferences

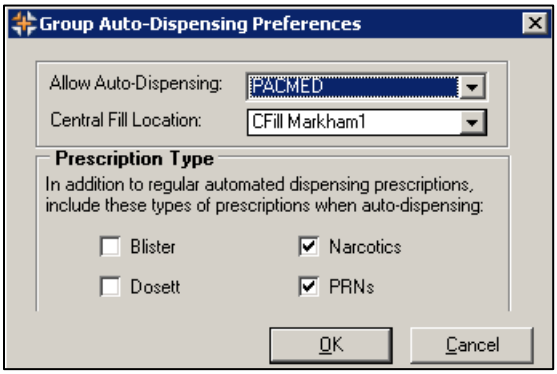
Users will have the ability to select the location they wish to send their Central Fill file at the group-level. This permits pharmacies to send different files to different active Central Fill locations and/or devices.

The group-level Central Fill location will override the prescription Auto-Dispense Setting when a prescription is filled within a group. However, if you are filling retail prescriptions using an Auto-Dispense device, the Drug-Level setting will take precedence.

NOTE: When filling a new or refill prescription, the Central Fill location will always look at the Group Auto-Dispensing location preference first. Any changes made at the drug-level will only apply for that one fill. All subsequent fills will revert back to the location set at the group-level.

To modify the Central Fill Location from the Group Auto-Dispensing Preferences:

1. Select **More** > **Groups**.
2. Search for and select the group you wish to modify the preferences for.
3. Select the **Preferences** tab.
4. Select the **Auto-Dispensing** button located in the *General* groupbox. The 'Group Auto-Dispensing Preferences' window appears.



5. From the *Central Fill Location* dropdown, select the location you wish to send your Central Fill file to.
6. Select the **OK** button.

NOTE: The Location dropdown will be greyed out if Central Fill is not activated at your pharmacy.

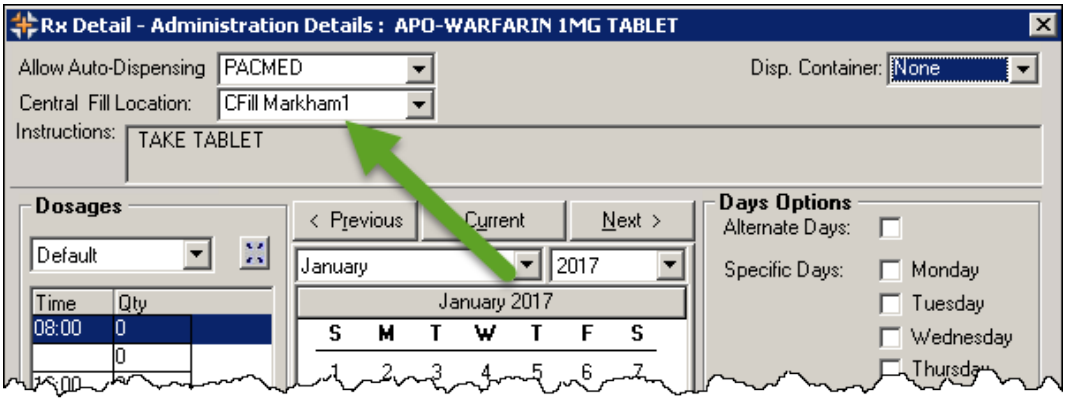
Prescription Auto-Dispensing Preferences

Users will have the ability to select the location they wish to send their Central Fill file at the prescription-level. The prescription-level Central Fill location will override the group-level setting.

By default, the *Central Fill Location* dropdown will be populated with the Central Fill Location set up in the Group Auto-Dispense Preference. Any changes made at the prescription-level will only apply for that one fill. All subsequent fills will revert back to the location set at the group-level.

To modify the Central Fill Location from the Prescription Auto-Dispense Preferences:

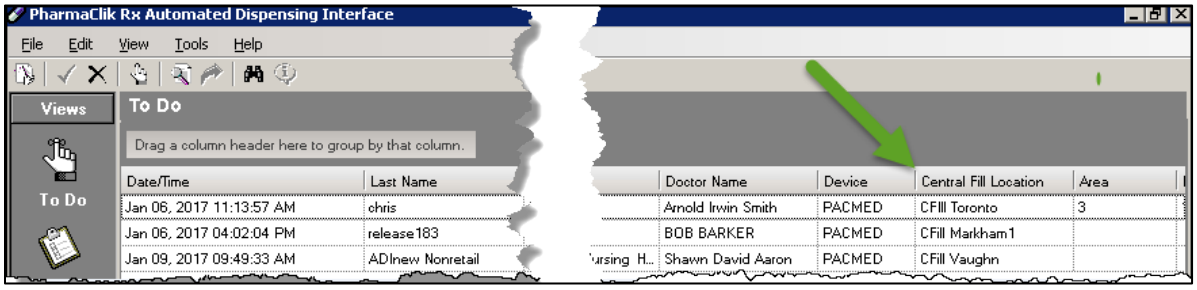
1. Open an incomplete prescription in Rx Detail.
2. Select the magnifying glass icon. The 'Rx Detail – Administration Details' window appears.



3. From the *Allow Auto-Dispensing* dropdown, select the device you wish to dispense to.
4. From the *Central Fill Location* dropdown, select the location you wish to send your Central Fill file to.
5. Select the **OK** button.

Automated Dispensing Interface

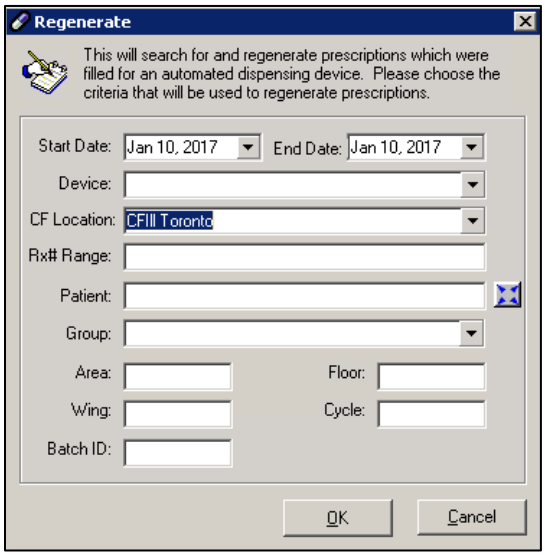
The ADI now has a new Central Fill Location column. This column indicates which Central Fill location each prescription will be sent to. This column is for informational purposes only. You will not be able to change the location from this column. If you must change the location, refer back to the Preferences section.



Selecting Criteria for Regenerate Prescriptions

Users will have the ability to select a Central Fill Location from the ‘Regenerate’ window. This will permit the use to re-direct the Central Fill file, if necessary.

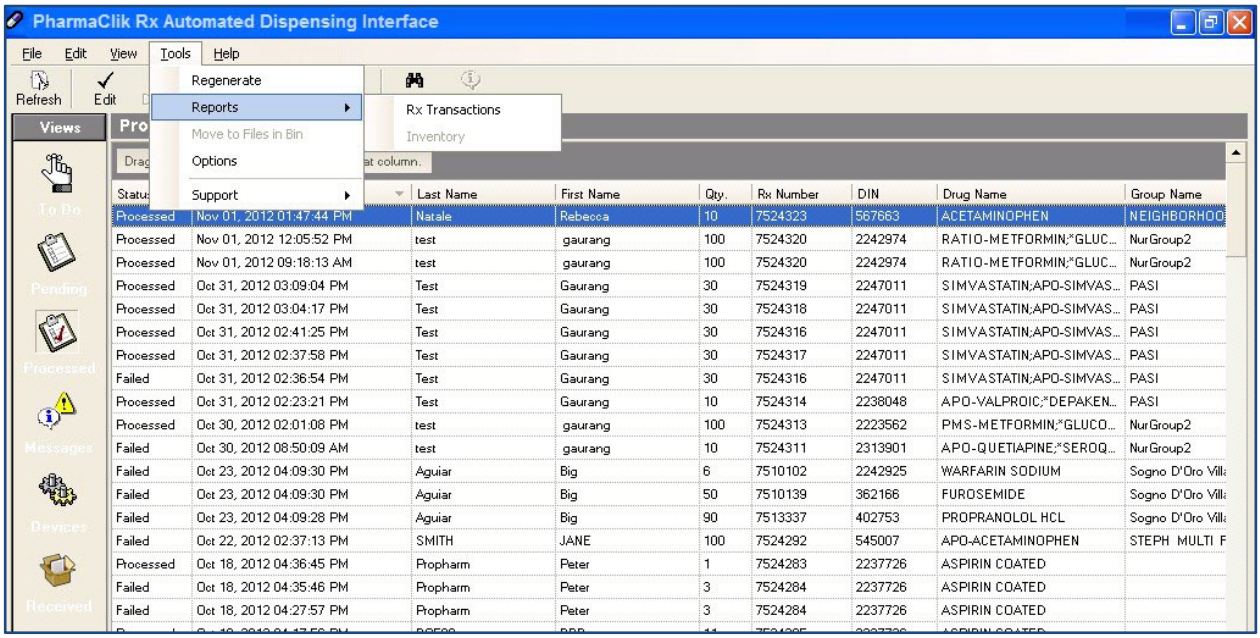
Users will not have the ability to change the Central Fill Location to another location that has a different layout (e.g. Synmed to PacMed). A validation prompt will appear: "The Central Fill location you are attempting to change has a different packaging file format - change of Central Fill location is not permitted."



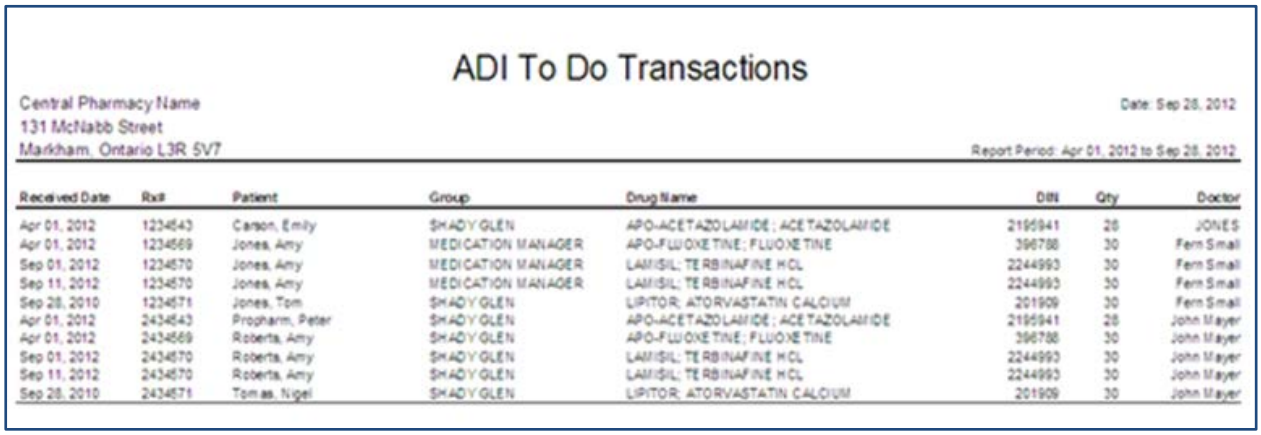
6. ADI Reports

Transaction Reports

Reports have been enhanced to allow reporting on the **To Do**, **Pending**, **Processed** and I**nventory** views in the ADI.



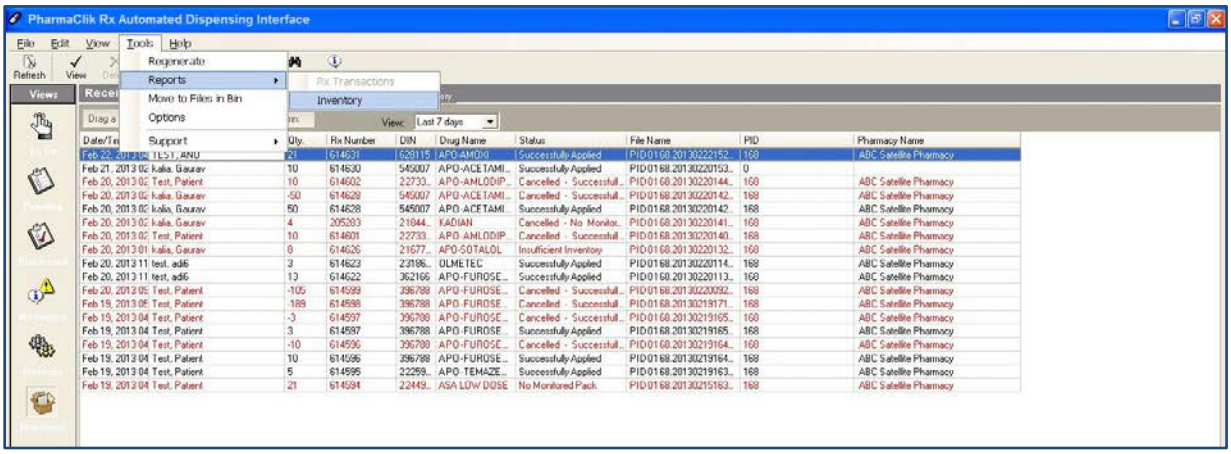
Retail devices will <u>not</u> place Rx transactions into the **To do**, or **Pending** tabs; as a result ScriptPro reporting will only be available on the **Processed** tab.

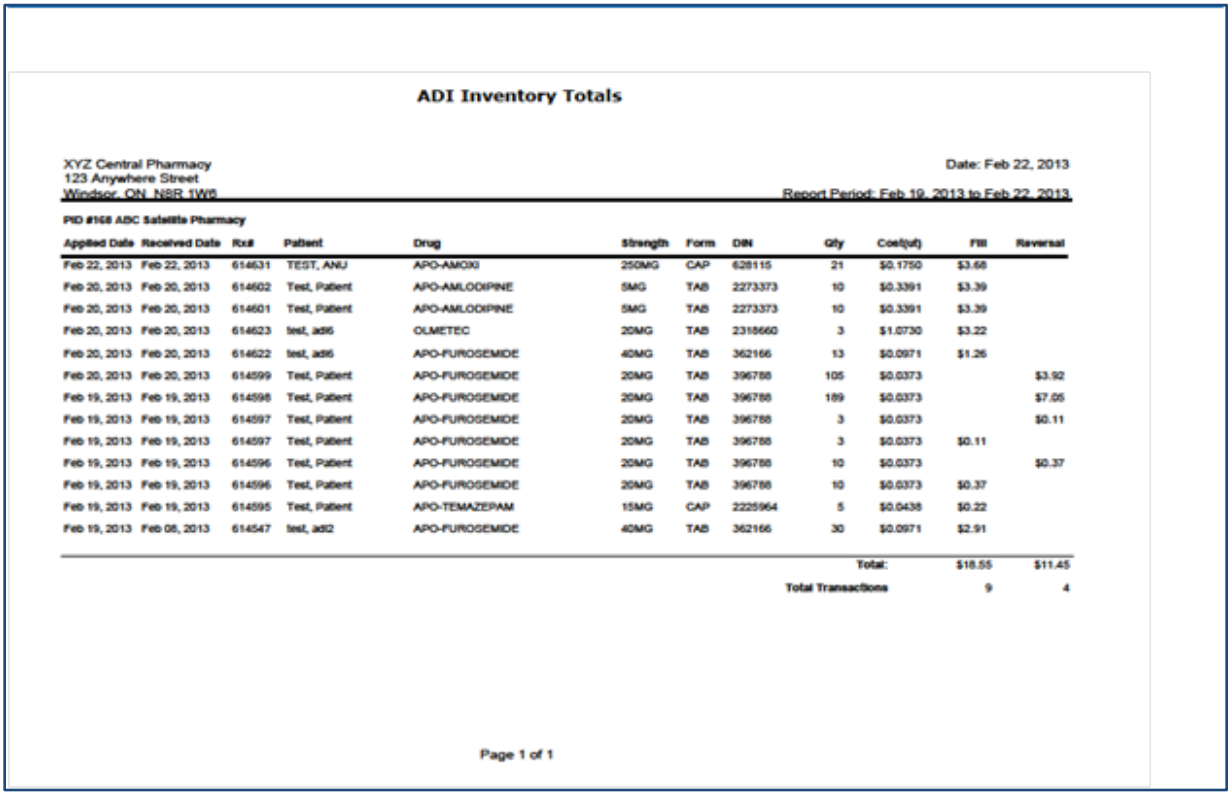


When the **Rx Transactions** report is generated the title of the report changes dynamically based on the tab from which it was generated, that is if the **To Do** tab is selected then the report will be titled ADI **To Do Transactions**.

Inventory Report

A new **ADI Inventory** report is available when the **Received** tab has been selected and the view is on the **Inventory** radio button. This report is specific to Central ADI when in a Central Fill environment.





ADI Inventory Totals

XYZ Central Pharmacy
123 Anywhere Street
Windsor, ON, N8R 1W8

Date: Feb 22, 2013
Report Period: Feb 19, 2013 to Feb 22, 2013

PID #168 ABC Satellite Pharmacy

Applied Date	Received Date	Rx#	Patient	Drug	Strength	Form	DIN	Qty	Cost(ut)	Fill	Reversal
Feb 22, 2013	Feb 22, 2013	614631	TEST, ANU	APO-AMOXI	250MG	CAP	628115	21	$0.1750	$3.68	
Feb 20, 2013	Feb 20, 2013	614602	Test, Patient	APO-AMLODIPINE	5MG	TAB	2273373	10	$0.3391	$3.39	
Feb 20, 2013	Feb 20, 2013	614601	Test, Patient	APO-AMLODIPINE	5MG	TAB	2273373	10	$0.3391	$3.39	
Feb 20, 2013	Feb 20, 2013	614623	test, adi6	OLMETEC	20MG	TAB	2318660	3	$1.0730	$3.22	
Feb 20, 2013	Feb 20, 2013	614622	test, adi6	APO-FUROSEMIDE	40MG	TAB	362166	13	$0.0971	$1.26	
Feb 20, 2013	Feb 20, 2013	614599	Test, Patient	APO-FUROSEMIDE	20MG	TAB	396788	105	$0.0373		$3.92
Feb 19, 2013	Feb 19, 2013	614598	Test, Patient	APO-FUROSEMIDE	20MG	TAB	396788	189	$0.0373		$7.05
Feb 19, 2013	Feb 19, 2013	614597	Test, Patient	APO-FUROSEMIDE	20MG	TAB	396788	3	$0.0373		$0.11
Feb 19, 2013	Feb 19, 2013	614597	Test, Patient	APO-FUROSEMIDE	20MG	TAB	396788	3	$0.0373	$0.11	
Feb 19, 2013	Feb 19, 2013	614596	Test, Patient	APO-FUROSEMIDE	20MG	TAB	396788	10	$0.0373		$0.37
Feb 19, 2013	Feb 19, 2013	614596	Test, Patient	APO-FUROSEMIDE	20MG	TAB	396788	10	$0.0373	$0.37	
Feb 19, 2013	Feb 19, 2013	614595	Test, Patient	APO-TEMAZEPAM	15MG	CAP	2225964	5	$0.0438	$0.22	
Feb 19, 2013	Feb 08, 2013	614547	test, adi2	APO-FUROSEMIDE	40MG	TAB	362166	30	$0.0971	$2.91	
									Total:	$18.55	$11.45
									Total Transactions	9	4

Page 1 of 1

The report includes all **Successfully Applied** inventory adjustments (fills and reversals) that took place within the specified report time period. The report includes the quantity which was filled for each prescription along with the Unit Cost. The **Unit Cost** column is followed by the calculated cost which is equal to the Unit Cost x Available A/S/E cost from the drug folder. The report displays a total sum of the calculated cost at the bottom of the page and is grouped by store name

McKESSON Canada

Pharmacy Technology Solutions

Pharmaclik RX

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Markham, Ontario
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