The Integrated Pharmacy

User Documentation

BUSINESS
CARE
CONNECTIVITY

Table of Contents

1.   Workflow

Introduction

Your PharmaClik Rx point of sale and dispensary systems have been integrated in order to facilitate prescription sales tracking. As such, each time a prescription is filled; information including prescription number, patient ID and prescription price will be passed from the dispensary system to POS.

When the patient picks-up his or her prescription and the barcode on the prescription label is scanned at the POS till, the amount owing will automatically be registered, as well as the prescription number. In turn, the POS till will send a message back to the dispensary system indicating that the prescription has been picked-up by the patient.

This will allow the dispensary system to track and report which prescriptions have been picked up and which have not. If not picked-up within a specified period of time, stores equipped with the outbound IVR (Interactive Voice Response) system will automatically initiate a call to the patient as a reminder that a prescription is waiting for pick-up.

In order to ensure that this new feature functions correctly, and to avoid calls to patients that have already picked-up their prescriptions, it is imperative that **each** and **every** prescription picked up by the patient is scanned through the till. This includes prescriptions that are fully covered by the insurer and that have a "Pays" amount of $0.00.

The following pages describe how to handle prescription sales at the POS till. Please review the contents of this document thoroughly with your pharmacy staff and cashiers. Please also ensure each of your staff members is aware that every prescription must now be scanned through the till.

Should you have any questions regarding this document or require assistance, please contact PTS Customer Care at **1-800-387-6093 Option #3.**

Workflow and PharmaClik Rx

Workflow Statuses

Workflow statuses identify each prescription's filling status in the pharmacy; they are indicated in the **In Process** and **Completed** tabs on the **Workbench**. The following Workflow statuses are available:

Open in Rx Detail   'Open in Rx Detail' prescriptions were previously referred to as 'In Process'. As per existing functionality, these prescriptions cannot be opened from the **In Process** tab, since they are already open in **Rx Detail** on a workstation.

Queued   'Queued' prescriptions were previously located in the **Queued** tab. The same functions and information previously available in the **Queued** tab continue to be available/displayed for Queued prescriptions in the **In Process** tab.

Waiting for Delivery   Complete prescriptions that have been flagged for *Delivery* in the main tab of Rx Detail are automatically assigned 'Waiting for Delivery' **if PharmaClik Rx is integrated with PharmaClik POS**. These prescriptions remain 'Waiting for Delivery' and are carried over to the next day's **Completed** tab until they are scanned through PharmaClik POS at the till. This gives a running total of all prescriptions that are currently waiting to be delivered.

Waiting for Pickup   Complete prescriptions are automatically assigned 'Waiting for Pickup' **if PharmaClik Rx is integrated with PharmaClik POS**. These prescriptions remain 'Waiting for Pickup' and are carried over to the next day's **Completed** tab until they are scanned through PharmaClik POS at the till. This gives a running total of all prescriptions that are currently sitting in the pickup bin.

Picked Up   **If PharmaClik Rx is integrated with PharmaClik POS**, prescriptions become 'Picked Up' once they are scanned through PharmaClik POS. 'Picked Up' prescriptions remain in the **Completed** tab for the date they were picked up, providing a reflection of the number of prescriptions that have been picked up each day.

To ensure workflow is correctly assigned to prescriptions, <u>ALL PRESCRIPTIONS MUST BE SCANNED THROUGH PharmaClik POS,</u> including those with Patient Pays $0.00.

Workflow Status	Color	Available in These Tabs…
Open in Rx Detail	Blue	In Process
Queued	Yellow	In Process
Waiting for Delivery	Orange	Completed
Waiting for Pickup	Green	Completed
Picked Up	Pale Red	Completed

A prescription's workflow status is indicated using color-coding in the **Priority** column.

Place the cursor over the color-coded **Priority** column to see the number of prescriptions within a workflow status. **A tool tip shows the number of prescriptions and the workflow status.**

In the example shown here there are 21 prescriptions Waiting for Pickup (green in the **Priority** column).
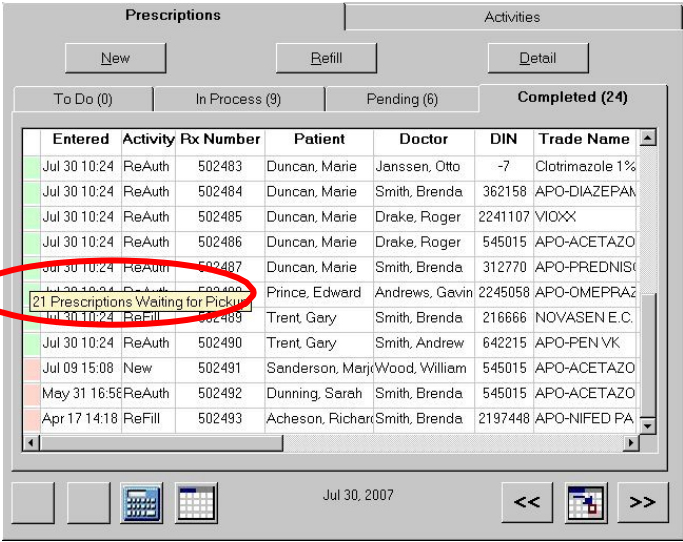
Workbench in Process Tab

The **Workbench In Process** tab lists all prescriptions that are being processed, meaning someone is currently working on them in **Rx Detail** (Open in Rx Detail), or they are being adjudicated (Queued).

Notes about the in the Process tab

- **Open in Rx Detail** prescriptions are listed at the top of the tab; these prescriptions cannot be highlighted.
- **Queued** prescriptions have the same functionality as in the previous **Queued** tab.
- Workflow statuses in the **In Process** tab are assigned by PharmaClik Rx and cannot be modified.
- When a Filter is used in the **In Process** tab, it does not apply to the **To Do**, **Pending** or **Completed** tabs; filters in the To Do, Pending and Completed tabs do not apply to the **In Process** tab.

Workbench Completed Tab

Workflow statuses in the **Completed** tab determine if a prescription is waiting to be delivered, waiting to be picked up, or has already been picked up.

Workflow statuses are automatically assigned in the Completed tab if PharmaClik Rx is integrated with PharmaClik POS.

Notes about the Completed tab

- **Waiting for Delivery** prescriptions are at the top of the tab, followed by **Waiting for Pickup** and **Picked Up**.

- **Picked Up** prescriptions remain in the **Completed** tab for the date they were picked up.

- **Waiting for Delivery** and **Waiting for Pickup** prescriptions move to the next day's **Completed** tab until they are picked up.

- Prescriptions with no workflow status are at the bottom of the tab. These prescriptions are **Amend Next**, **Cancelled**, **Hold**, **Transferred**, **Not Filled** (BC only), or **Discontinued** (BC only). They remain in the **Completed** tab for the date on which the action took place.

- Workflow statuses in the **Completed** tab are automatically assigned if PharmaClik Rx is integrated with PharmaClik POS; workflow statuses can be modified.

- Prescriptions are not assigned workflow statues if a pharmacy does not have PharmaClik POS integration; users can manually assign workflow statuses if desired.

Changing a Prescription's Workflow Status

Workflow statuses can be modified in the **Completed** tab, providing the following benefits:
- Pharmacies without PharmaClik POS integration can manually assign workflow statuses.
- Provides a manual override for workflow statuses automatically assigned at PharmaClik POS integrated pharmacies. For example, a prescription is flagged as 'Waiting for Pickup', but should be 'Waiting for Delivery'; or a $0.00 prescription was not scanned through PharmaClik POS, therefore the prescription remains as 'Waiting for Pickup' unless it is manually changed to 'Picked Up'.

To change a prescription's workflow status, highlight the prescription(s) to be updated and **right click on the Priority column**. The right click applies to the prescription on which you have clicked OR if multiple prescriptions are highlighted, the right click applies to all highlighted prescriptions. The **Change Workflow Status** menu appears.

Change to 'Waiting for Delivery'	D
Change to 'Picked Up'	P
Change to 'Waiting for Pickup'	W
Remove Workflow Status	R

The available options in the menu depend on the current workflow status of the highlighted prescription(s). The letters on the right side of the menu are keyboard shortcuts for each option.

In this example, the highlighted prescriptions are 'Waiting for Pickup', so these prescriptions can be changed to 'Waiting for Delivery', 'Picked Up', or the workflow status can be removed.

All menu options will be disabled if there are no common workflow statuses for the selected prescriptions.

If this occurs, review the highlighted prescriptions in the **Completed** tab and deselect any prescriptions that should not be highlighted.

The **Change Workflow Status** window appears once an option is selected from the **Change Workflow Status** menu. This window displays all highlighted prescriptions and serves two purposes:
- A confirmation of which prescriptions to update with the new workflow status.
- Provides the ability to deselect prescriptions that were accidentally highlighted.

Indicates the **new workflow status**.

Review the list of prescriptions and use the checkboxes to **deselect** any that should not be changed to the new workflow status.

Lists each highlighted prescription on the Completed tab and its **current workflow status**.

Total # Rx is the number of prescriptions highlighted on the Workbench.

 # Rx to Change is the number of prescriptions that will be changed to the new workflow status.

Press the **OK** function button to apply the workflow status change to the selected prescriptions.
Cancel closes the window without changing the workflow status.

To change a prescription's workflow status
1. Go the **Workbench**.
2. Press or click the **Completed** tab.
3. To change one prescription: Use the mouse to right-click on the prescription's **Priority** column (i.e. the color-coded column).
   To change multiple prescriptions: Highlight all prescriptions to be changed, and then use the mouse to right-click on the **Priority** column for a highlighted prescription.
4. The Change **Workflow Status** menu appears. Make a selection in the menu.
5. The **Change Workflow Status** window appears. Review all prescriptions listed in the window and deselect any prescriptions that should not be assigned the new workflow status.
6. Press or click the **OK** button. The screen returns to the **Completed** tab and the selected prescriptions have the new workflow status.

NOTE   By changing the prescription status in PharmaClik Rx, this will not update PharmaClik POS that the prescription has been picked-up.

Compliance Packaged Prescription Workflow Preferences

Compliance packaged prescriptions, such as Blister and Dosett prescriptions, can be set to have a specific workflow status in the Completed tab. This preference is set in **Workflow Preferences** window, accessed from **More > Pharmacy > Workflow > Compliance** tab.
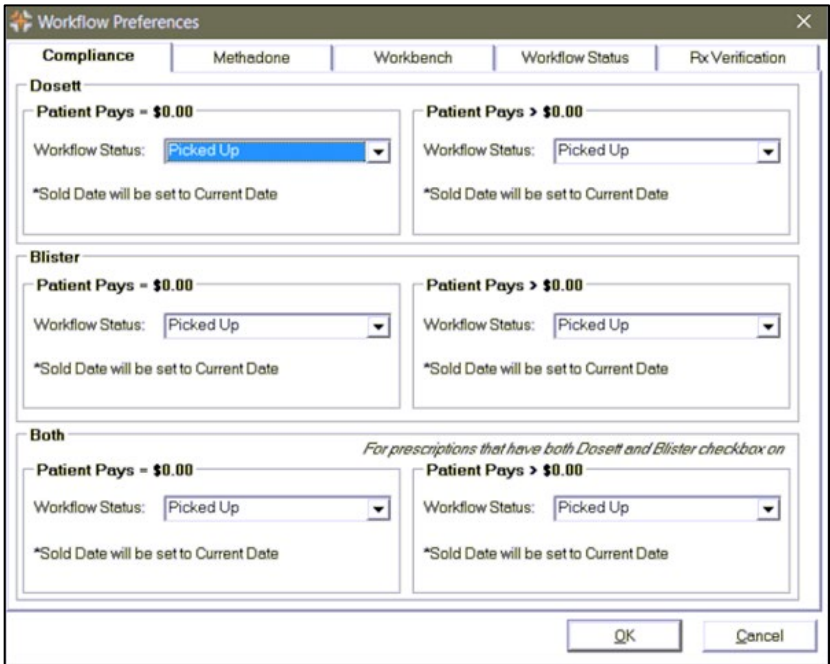
A **Workflow Status** of **Picked Up** or **Waiting for Pickup/Delivery** can be selected from the **Workflow Status** dropdown based on the following settings.

- The compliance packaging flag set in the **Rx Detail** window of the prescription:
  - Blister
  - Dosett
  - Both
- The amount the patient pays for the prescription:
  - Patient Pays = $0.00
  - Patient Pays > $0.00

If the **Workflow Status** is set to **Picked Up**, the prescription does not need to be scanned at the PharmaClik POS till.

Methadone Prescriptions Workflow Preferences

Methadone prescriptions can be set to have a specific workflow status in the Completed tab. This preference is set in **Workflow Preferences** window, accessed from **More > Pharmacy > Workflow > Methadone** tab.
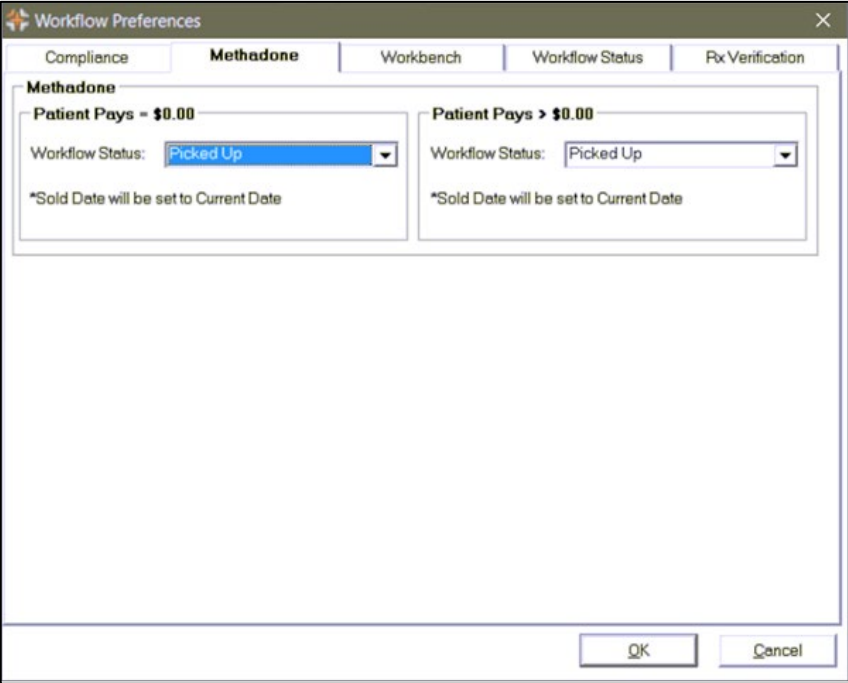

A **Workflow Status** of **Picked Up** or **Waiting for Pickup/Delivery** can be selected from the **Workflow Status** dropdown based on the amount the patient pays for the prescription:

- o   Patient Pays = $0.00
- o   Patient Pays > $0.00

If the **Workflow Status** is set to **Picked Up**, the prescription does not need to be scanned at the PharmaClik POS till.

WORKFLOW AND **PharmaClik POS**

Selling a Prescription by Scanning

All prescriptions must now be scanned through the PharmaClik POS till, including those with a "Pays" amount of $ 0.00, as follows:

1. Scan the barcode located at the bottom of the prescription privacy label. The Rx number imbedded in the barcode will be used to query the database for the prescription price, etc.

Community Pharmacy   (905) 555-5555
131 McNabb St.
Markham, ON L3R 5V7
 	
Rx#: 7480001   Aug 08, 2007
Smith, John
1456 Maple Lane
Markham, ON L3R
5R6 (905) 555-4434
 	
                    Rep: 0
 	
                    CA
 	
‖‖‖‖‖‖‖‖‖ ‖‖‖‖‖‖‖ ‖‖
2000074800016
	‖‖ ‖‖‖‖‖‖‖‖‖‖‖‖ ‖‖‖‖‖‖‖ ‖‖
	2000074800016
	
	Rx Number
	
	Pays $ 23.89

2. If the prescription is on file, the prescription will be added to the transaction with the appropriate price, as shown below:

3. If the prescription is not on file, you will be prompted to enter the **Price**, as shown below.

4. Enter the price (if greater than $ 0.00) and then press the **Enter** key.
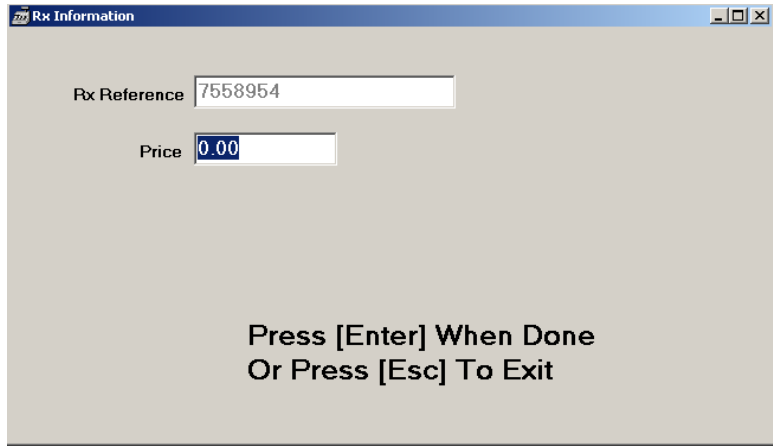
5. When you have entered all of the customer's purchases, select a method of payment, as usual (i.e. Cash).

6. If prescriptions other than those you scanned into the transaction are available for pick-up, but were overlooked, a message box will be displayed on the screen listing these prescriptions, as shown below:

TIP
When the **Outstanding Prescriptions** screen is displayed, you can use the **Tab** key to highlight the **Print** button and then press **Enter**. A stub will be printed listing the remaining prescriptions available for pick-up. Use this stub to locate these prescriptions in the bin, and then press the **Esc** key to return to the transaction in order to scan the remaining prescriptions.
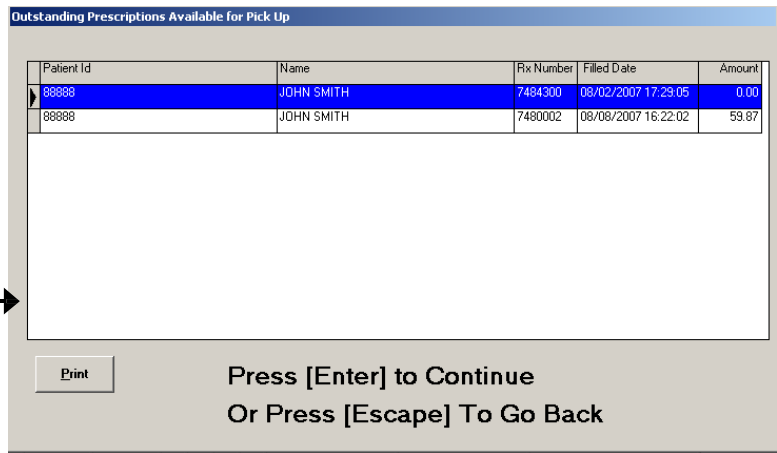
7. If the screen pictured above is displayed, you may press the **Escape** key to return to the transaction and ring in the remaining prescriptions or press the **Enter** key to complete the transaction, as is. You also have the option to print a list of outstanding prescriptions, as described.

	Prescriptions Available for Pick Up	
JOHN SMITH 88888		
7484300	08/02/2007 17:29:05	0.00
7480002	08/01/2007 16:22:02	59.87
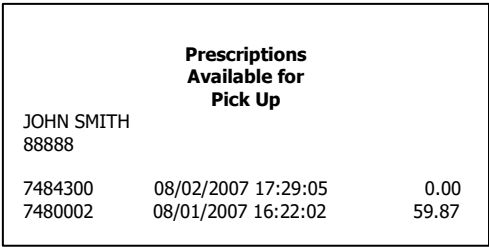
Manually Selling a Prescription

If you are unable to scan the barcode on the prescription privacy label for any reason, you may sell the prescription manually, as described below. This procedure may also be used to sell prescriptions with the "old" barcode format as explained in **Appendix A**.

1.   Press or click **F10-Rx** on the **Green** menu bar, shown below.

2.   The **Rx Information** screen will be displayed, as shown below.
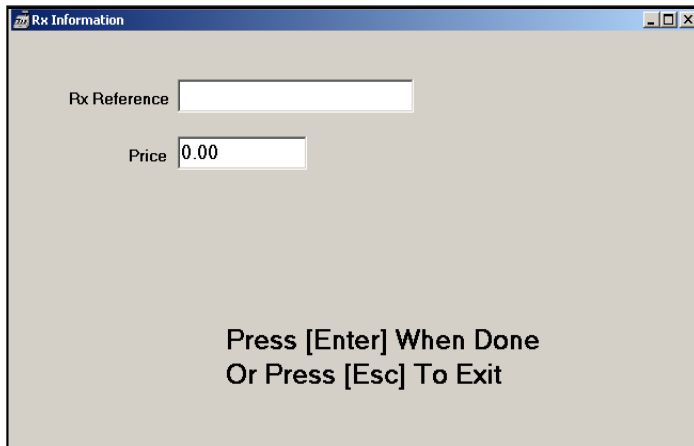
3.   Enter the 7 digit prescription number from the privacy label in the **Rx Reference** field, and then press the **Tab** key. If on file, the **Price** will be filled in automatically. If not, enter the "Pays" amount from the prescription label and then press **Enter**.

4.   The prescription will be added to the transaction, as shown below.


5.   When you have entered all of the customer's purchases, select a method of payment, as usual (i.e. Cash).

Returning a Prescription

In the event the patient returns a prescription, you must first return the prescription at the PharmaClik POS Till before cancelling the prescription in the dispensary system. To return a prescription, perform the   following:

1. Press the **F12** key to advance to the **Red** menu bar, and then press **F5-Item Refund**. "**IR**" (item refund) will be displayed on the information bar at the bottom of the screen.
2. Scan the barcode located at the bottom of the prescription privacy label. The Rx number imbedded in the barcode will be used to query the database for the prescription price, etc.

Community Pharmacy   (905) 555-5555
131 McNabb St.
Markham, ON L3R
8V7

Rx#: 7480001   Aug 08, 2007
Smith, John
1456 Maple Lane
Markham, ON L3R 5R6
(905) 555-4434

                                  Rep: 0

                                  CA   **Pays $ 23.89**

2000074800016
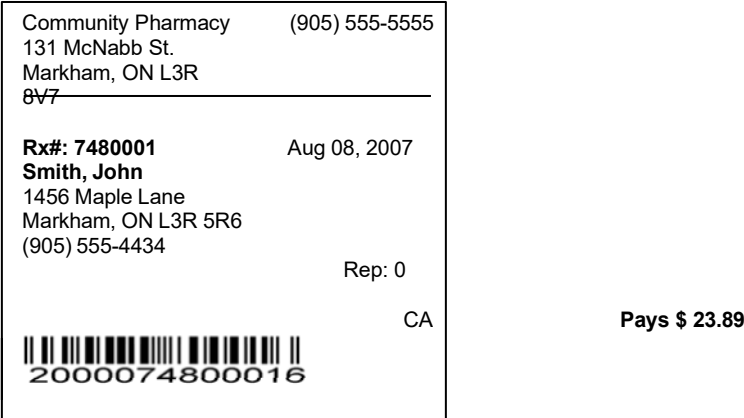
3. If the prescription is found, a message will be displayed indicating the item has already been sold, as shown below. This is just a warning to prevent you from selling the same prescription twice.

Attention

Rx 7480001 already sold on (Wed) Aug 8/2007 18:18:03. Continue?

Press [Enter] For Yes, Or [Esc] For No
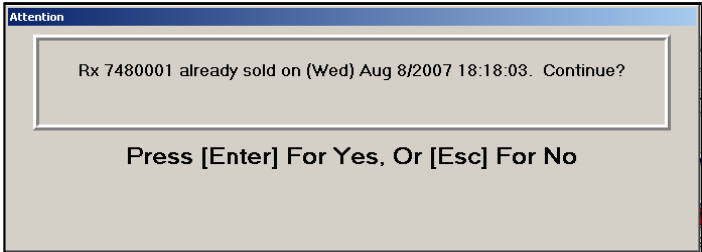
4. Press the **Enter** key to continue.
5. The **Rx information** screen (shown below) will be displayed, allowing you to confirm the original price paid for the prescription. If incorrect, modify the price and then press **Enter**. If correct, simply press **Enter**.

Rx Information

Rx Reference 7480001

Price 23.89

Press [Enter] When Done
Or Press [Esc] To Exit
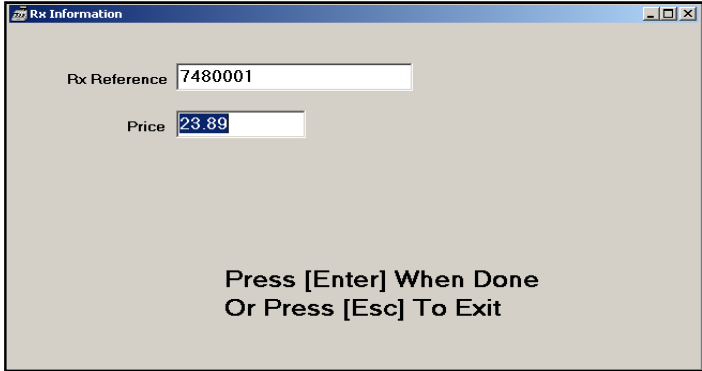
6.   The prescription will be added to the transaction with a negative amount, as shown below.

7.   To complete the transaction, select a method of payment (i.e. Cash).

Dispensary Integration Reporting

Should you need to report on prescriptions that were **Filled But Not Sold** (picked-up), in PharmaClik POS, perform the following:

1. From the **PharmaClik POS Utilities** menu, select **Dispensary Integration.**
2. From the **Report Selection** section, choose **Prescriptions Filled but Not Sold**.
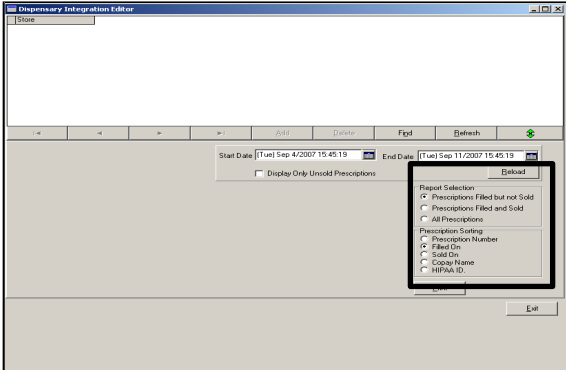
3. From the **Prescription Sorting** section, choose **Filled On** to sort by date sold or **Copay Name** to sort by patient name.
4. Press or click the **Print** button. The screen shown below will be displayed.
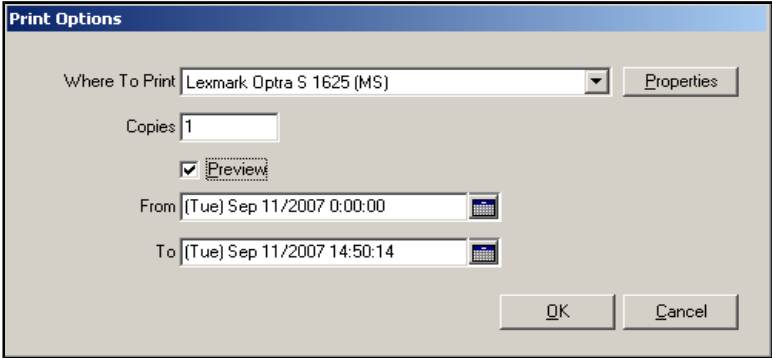
5. Enter the **From** and **To** dates (these are the dates between which the prescription was filled).
6. Select **Preview** and then press **OK.**
7. The report will be previewed, as shown below. To print, press the **Printer** icon.

Customer Loyalty Program & Rx Integration

Once PharmaClik POS is integrated with the PharmaClik Rx dispensary system, stores using the **Customer Loyalty** program will no longer be required to input the **Rx Total Amount for Loyalty Points** at the till[*].

For example, <u>prior </u>to Rx Integration, if a prescription was $100 with $98 paid by a 3rd party insurer and $2 paid by the patient, the cashier would have been prompted to enter the Rx Total Amount of $100 after the prescription was scanned into the transaction at $2 (as pictured below). This would allow loyalty points to be calculated on the 'total' $100 amount as opposed to the $2 'patient pays' amount.
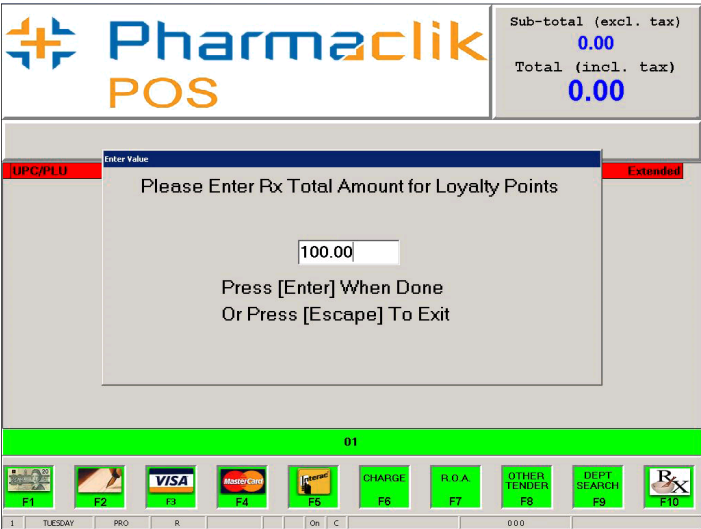
NOTE
This prompt will not appear after Rx Integration with PharmaClik Rx is enabled unless the prescription scanned is not found.

<u>After </u>Rx Integration with PharmaClik Rx is enabled, the PharmaClik POS till will automatically calculate loyalty points based on the Total Prescription Amount (if desired) without prompting the cashier to enter this value. This will improve efficiency at the till and eliminate keying errors. Please note; in the unlikely event the prescription is not found in PharmaClik POS, the cashier will be prompted to input the Rx Total Amount, as before.

This feature applies only to stores in provinces where points may be awarded on prescription sales, as dictated by the provincial pharmacy regulatory authority. Further, if your system has been configured to award points on the 'patient pays' amount only, as opposed to the total prescription amount, this feature does not apply.

FREQUENTLY ASKED QUESTIONS (FAQ)

Q.   **Why must I sell prescriptions through the till that have a Pays amount of $ 0.00?**

A.   It is imperative that each and every prescription picked-up by a patient is scanned through the till in order to change the status of the prescription to "picked-up" in the PharmaClik Rx workbench. Further, if using the outbound IVR (Interactive Voice Response) system, a call will be made to the patient to remind them to pick-up a prescription that has already been picked-up.

Q.   **When a prescription is sold through the till with a Pays amount of $ 0.00, do I need to print a receipt and give to the patient?**

A.   Yes. The receipt should be given to the customer even when the total is $0.00. This is a "proof of purchase".

Q.   **If a prescription is paid in part or full by a third party insurer, can the insurer's portion be charged by PharmaClik Rx to an account in PharmaClik POS?**

A.   Yes, Workflow is automatically configured to charge all 3rd Party amounts to the 3rd Party charge account in PharmaClik POS at time of filling the prescription.

Q.   **How do I know which prescriptions in the pick-up bin have the old barcode format and which have the new?**

A.   The new barcode format will always begin with the number 2000. These should be scanned.

Q.   **Why is it important I identify prescriptions in the pick-up bin with the old barcodeformat and then black out the barcode on these prescriptions?**

A.   The old barcode format has the prescription number at the beginning of the code, while in the new format it is at the end. If you scan a prescription with the old barcode format, it will record the prescription number incorrectly. Prescriptions with the old barcode format should be entered into the till manually, as described on pages 5-6.

Q.   **When a prescription is returned, why do I need to enter the prescription price (Pays amount) from the prescription label?**

A.   Although the prescription price is stored in the database, if the prescription was cancelled and re-billed at a different price than that originally paid, it would be refunded at the wrong amount. As such, you are required to enter the refunded amount as a safeguard.

Q.   **How are my Nursing Home prescriptions handled? Do they have to be individually scanned out at the till?**

A.   No. If you are using the Nursing Home module in PharmaClik Rx, these prescriptions will automatically be set to "Picked Up" when they are filled.

Q.   **Why, on my PharmaClik POS Daily Cash report, do my sales seem to higher than in the past?**

A.   With the new integration activated, all 3rd Party amounts that are payable, are automatically posted to the 3rd Party charge account in PharmaClik POS. These new amounts will appear on the CHARGE total of the Daily Cash Report. As well, all reports that show the amounts for the ~~~01 – RX Open Dept Fineline or 01 – RX Open Dept barcode, will have higher values for the same reason.

Q.   Why, on some of my PharmaClik POS end of day reports, is there now a cashier 11120 or Till 30 showing?

A.   This is all the information being posted over from the PharmaClik Rx system. It has been designated as casher 11120 and Till 30 for reporting purposes.

Q.   Why has there been in an increase in Voids on my PharmaClik POS since going live with Workflow?

A.   Now in PharmaClik Rx when a prescription is cancelled, it will send a VOID command over to PharmaClik POS for the 3rd Party portion of the prescription. This will deduct the cancelled total from the 3rd Party charge account.

APPENDIX A

Old & New Prescription Barcode Formats

Prior to the integration of the dispensary and point of sale systems, barcodes printed on prescriptions were in a different format. The old barcode format (figure 1) contained the prescription price. This was required, as prescription data was not passed from the dispensary system to PharmaClik POS at the time of filling and therefore needed to be stored on the barcode.

Now that prescription data is stored in PharmaClik POS, the barcode only needs to include the prescription number, as shown in figure 2.

Figure 1 – Old Format

Figure 2 – New Format
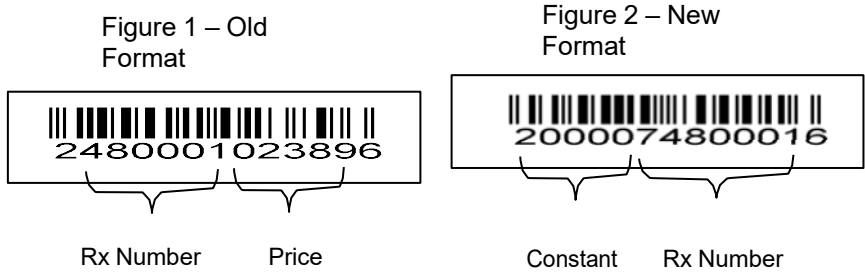
TIP
If you are not sure whether the barcode is in the new or old format, examine the first 4 digits of the barcode number. The new format always begins with **2000**, the old does not.

2480001023896

2000074800016

Rx Number   Price

Constant   Rx Number

Once pharmacy integration is enabled in your store, the barcode printed on prescription label will be in the new format. However, you may still have some older prescriptions that have not yet been picked-up that were printed with the old barcode format. You should identify these before your store goes "live" with pharmacy integration. Using a black marker, place a thick line through the barcode on these prescription labels to prevent them from being scanned, as shown below.

Figure 1 - Old Format

Figure 2 – New Format

2480001023896

2000074800016

Price   Constant
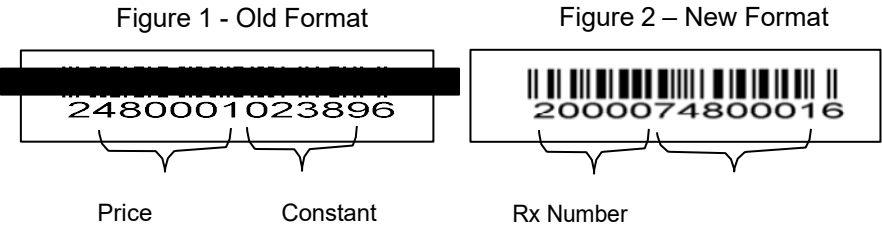
Rx Number

When you sell these prescriptions at the till, you will need to enter them manually as described on pages 5 through 6. Selling remaining prescriptions with the old barcode format using the "manual" method will ensure the prescription number and price are recorded correctly. Further, this will ensure the correct information is passed back to the dispensary system to indicate that the prescription has been picked-up.

2. OTC Inventory Transfer

OTC INVENTORY TRANSFER

PharmaClik Rx/PharmaClik POS Pro integration allows front shop inventory to be transferred into PharmaClik Rx inventory for prescription use. PharmaClik POS Pro sends full packages to PharmaClik Rx and inventory is immediately updated in both systems.

Navigating the PharmaClik POS Inventory Transfer Fields

The PharmaClik Rx fields used for PharmaClik POS inventory transfer are located in the Drug folder Inventory tab. Drugs are flagged for inventory transfer at the pack size level. The three main fields used for inventory transfer are: **POS Size, POS Product** and **Main UPC**.

PharmaClik POS Size column

PharmaClik POS Size is the quantity that will be removed from PharmaClik POS inventory when one package is transferred to PharmaClik Rx inventory. The PharmaClik POS Size will be **1** for most products.
Main UPC and
Alt UPC fields

The product's UPC must be entered in the **Main UPC** field. This ensures PharmaClik Rx queries PharmaClik POS Pro for the correct product. An alternate UPC can be entered in the **Alt UPC** field.

Reset function button

Inventory should not be reset for PharmaClik POS Products. Refer to the *Questions & Answers* at the end of this document for more information.
Re-Order Point and
Re-Order # Packs fields

Re-Order Point and **Re-Order # Packs** are blank and blocked, since these fields are not used for PharmaClik POS Products – PharmaClik POS Products are not re-ordered through PharmaClik Rx.

PharmaClik POS Product checkbox

The **PharmaClik POS Product** flag tells PharmaClik Rx that the pack size is a regular front- shop item (e.g. vitamins, Ensure, etc…). When a pack size is flagged as a *PharmaClik POS Product*, inventory will be pulled from the PharmaClik POS system when additional packs are required for prescriptions.
The pack size will not be re-ordered through PharmaClik Rx purchase orders – the *Re-Order Point* and *Re-Order # of Packs* will be blank and PharmaClik Rx will ignore this pack size when creating purchase orders.
PharmaClik POS Products are only re-ordered through PharmaClik POS purchase orders. The *PharmaClik POS Product* flag is disabled;

Filling Prescriptions for PharmaClik POS Products

Prescriptions for PharmaClik POS products are filled in the same manner as regular prescriptions. PharmaClik Rx and PharmaClik POS Pro manage the inventory for PharmaClik POS products without user intervention.

- When a prescription for a PharmaClik POS Product opens in Rx Detail and PharmaClik Rx has enough On Hand to fill the prescription, a PharmaClik POS inventory transfer is not required and the prescription is filled as usual.

- Prescriptions filled for PharmaClik POS Products indicate ***PharmaClik POS Product*** on the label set's File Copy.

- If PharmaClik Rx does not have enough On Hand to fill the prescription, an Alert in Rx Detail indicates:

> ◇ Feb 22, 2006   Insufficient On Hand. Inventory will be transferred from POS.
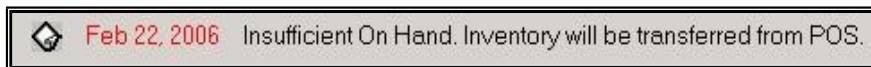
- Upon pressing the FILL, QUEUE or MULTI-FILL action button in Rx Detail, PharmaClik Rx sends an inventory transfer request to PharmaClik POS Pro. When an inventory transfer is requested, PharmaClik POS Pro returns one of two responses: Accepted, or UPC Does Not Exist. Each scenario is described below.

When the PharmaClik POS Inventory Transfer Request is Accepted by PharmaClik POS Pro

When a transfer request is accepted, PharmaClik POS Pro transfers as many full packages as required to fill the prescription; no intervention is required by the user and no prompts appear.

- In PharmaClik Rx, the product's Shipment Details indicates the On Hand was adjusted by a *PharmaClik POS Product Transfer*.

- Once the prescription is filled, the balance of the inventory transfer remains as an On Hand amount in PharmaClik Rx inventory.

For example,

A prescription is created for 30 tablets of Claritin using pack size 18.

- PharmaClik Rx has no On Hand inventory for pack size 18; therefore two packages are transferred from PharmaClik POS inventory.
- PharmaClik POS inventory is "virtually" reduced by two (2) packages (you will physically remove two packages from the front shop) and PharmaClik Rx inventory increases by 36 tablets (pack size 18 x 2 packages).

The prescription is filled for 30 tablets and the PharmaClik Rx On Hand becomes 6 tablets. An RX INV sticker is placed on the remaining 6 tablets.

When the UPC Does Not Exist in PharmaClik POS Pro

An inventory transfer request will be unsuccessful if the UPC does not exist in PharmaClik POS Pro. The following prompt appears in Rx Detail when this occurs:

Press **OK**.

- The prescription finishes processing and the label set prints.

- An inventory transfer DOES NOT occur and PharmaClik Rx creates an Owe Amount for the outstanding quantity.

When the UPC does not exist, you must correct the UPC and rebill the prescription. Before proceeding, retrieve a package from the shelf so you can verify the UPC on the physical package against the UPC entered in PharmaClik Rx.

PART 1: Verify or edit the UPC in PharmaClik Rx

1. Press or click the **Drug** button.
2. Search for and select the drug.
3. Press or click the **Inventory** tab.
4. Highlight the pack size that was dispensed.
5. Verify the **Main UPC** field (see page 1 of an example of the *Main UPC* field). Make any corrections.
6. Press or click the **Save** button to save changes.

> If the UPC in PharmaClik Rx matches the UPC on the package, have the Store Manager verify the UPC in PharmaClik POS Pro.
>
> The UPC must be the same in both systems. PharmaClik POS Pro cannot accept an inventory transfer request if the UPCs do not match.

PART 2: Rebill the prescription

- The prescription can be rebilled once the UPC has been corrected in PharmaClik Rx and/or PharmaClik POS Pro.

- Follow the regular procedures for rebilling a prescription.

- The prescription will be cancelled and then resubmitted with the same prescription number – the inventory transfer request will be submitted on fill.

PharmaClik Rx   *See*   **More>Help**

Use PharmaClik Rx Help to learn about rebilling prescriptions.
1. Press or click the **More** button.
2. Press or click the **Help.**
3. Press or click the **Go to Quick Tips** button at the top of the page.
4. Scroll down to **Rebilling Prescriptions**.
5. Press or click the **Rebilling Prescriptions** button.

When PharmaClik POS Pro has Insufficient Inventory (Advanced PharmaClik POS Inventory)

An inventory transfer request will be unsuccessful if there is not enough inventory on the PharmaClik POS system. If this occurs, the following prompt appears in the **Rx Detail**:

PharmaClik Rx Warning

⚠ Insufficient inventory in POSPro.

OK

You must press **OK** in the message.

- The prescription finishes processing and the label set prints.

- An inventory transfer DOES NOT occur and PharmaClik Rx creates an Owe Amount for the outstanding quantity.

Owe Amounts for PharmaClik POS Products must be reconciled manually from either the **Activities** tab or the **Drug** folder, as per existing functionality for processing owe balances. Once the **Owe Amount** is reconciled in PharmaClik Rx, PharmaClik POS inventory must also be manually updated.

Follow your regular procedures for manually recording front shop inventory reductions.

PharmaClik Rx   *See*

Use the **PharmaClik Rx Help** to learn about reconciling owe amounts.
1. Press or click the **More** button.
2. Press or click the **Help**.
3. Press or click the **Go to Quick Tips** button.
4. Scroll down to **Owe Balances**.
5. Press or click the **Owe Balances**.

There are three scenarios in an insufficient inventory situation
(a) If the **PharmaClik POS Pro** inventory is incorrect, correct the inventory in **PharmaClik POS Pro** and rebill the prescription in PharmaClik Rx.
(b) If there is insufficient inventory in **PharmaClik POS Pro**, place a front shop order for the product. Once the order is received, update the inventory in **PharmaClik POS Pro** and rebill the prescription in PharmaClik Rx.
(c) If there is insufficient inventory in **PharmaClik POS Pro**, rebill the prescription in PharmaClik Rx using a different brand.

When there is Insufficient Inventory in the Front Shop (Non-Advanced PharmaClik POS Inventory)

Read the scenarios below to understand what to do when there is not enough inventory in the Front Shop.

SCENARIO A

There is no inventory in Front Shop or Pharmacy to fill the prescription.

1. Transfer of OTC inventory occurs automatically.
2. Order inventory.
3. Take the item from Front Shop when it arrives, as it has already been transferred to Rx.

SCENARIO B

There is no inventory in Front Shop or Pharmacy to fill the prescription and the prescription is Cancelled (e.g. due to the item not being covered or due to patient's decision).

1. Transfer of OTC inventory occurs automatically.
2. Order inventory.
3. Take the item from Front Shop when it arrives, as it has already been transferred to Rx.
4. Keep inventory in the Pharmacy for future prescriptions.

An alternate solution to handling insufficient inventory:

If there is insufficient inventory in the Front Shop, rebill the prescription in PharmaClik Rx using a different brand.

IMPORTAN	**RXUSE Customer Account** The RXUSE customer account should no longer be used for any transactions through the **PharmaClik POS Till**. **Methadone Carries** When filling prescriptions for Methadone carries, an inventory transfer cannot be performed on the Distilled Water in the Methadone mixture. The inventory transfer can only be performed when a Methadone prescription is filled without carries.

Cancelling Prescriptions for PharmaClik POS Products

When a **PharmaClik POS Product** prescription is cancelled, PharmaClik Rx keeps the transferred inventory amount. **The inventory amount is NOT returned to the front shop. You must physically remove the product from the front shop** to maintain accurate inventory in both the front shop and the dispensary.

If a prescription is not picked up, cancel the prescription in PharmaClik Rx. Since the product is monitored in PharmaClik Rx inventory, cancelling the prescription returns the On Hand to PharmaClik Rx inventory – **it does not return the amount to PharmaClik POS Pro**.

Place an **RX INV** sticker on the product and store the product in <u>Pharmacy inventory stock</u>.

Backgrounding and Batch Processing

When a prescription for a PharmaClik POS Product is backgrounded, or scheduled for batch processing, PharmaClik Rx performs the same validation checking as the regular prescription filling process. The prescription will stop in **the Workbench Pending** tab with status I**ncomplete** if the prescription has insufficient inventory on hand and requires a PharmaClik POS inventory transfer.

|	
Backgrounding	Open the prescription in the **Rx Detail** as usual. In the **Rx Detail**, the **Alerts** indicate *Insufficient On Hand*. Inventory will be transferred from PharmaClik POS" (this is the same alert as shown on page 2). Continue to fill the prescription as usual, following the procedures described under 'Filling Prescriptions for PharmaClik POS Products' at the beginning of this document.
Batch Processing	In the **Batch Profile**, the **Prescription Information** column indicates *PharmaClik POS Transfer response required* for the **Pending** prescription. When the prescription is opened in Rx Detail, the **Alerts** indicate *Insufficient On Hand*. Inventory will be transferred from PharmaClik POS (this is the same alert as shown on page 2). Continue to fill the prescription as usual, following the procedures described under *Filling Prescriptions for PharmaClik POS Products* at the beginning of this document.
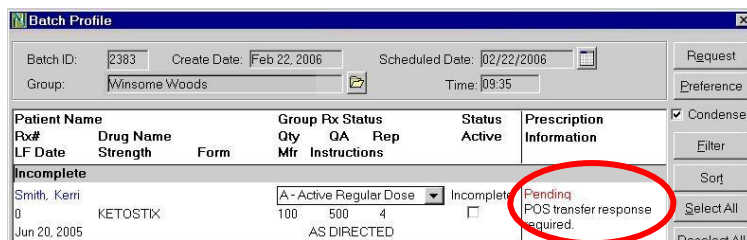
REPORTS

There are four reports that can be generated for PharmaClik POS Products: **Manual Adjustments Report**, **PharmaClik POS Products Report**, **Drug Movement**, and **Drug Movement Totals**. These reports can be used to track PharmaClik POS inventory transfers, find products that are flagged for PharmaClik POS inventory transfer, and monitor the volume of PharmaClik POS products that have been filled on prescription. Further details about each report are provided below.

Obtaining a List of Inventory Transfers

The **Manual Adjustments** report can be used to identify all PharmaClik POS Product inventory transfers that occurred during a specified time period. The report indicates the quantity and dollar value of the inventory transfer.

To generate the Manual Adjustments report for inventory transfers

1. Press or click the **More** button.
2. Press or click the **Reports**.
3. In the **Select a Report** window, highlight **Manual Adjustments**.
4. Press or click the **Next** button.
5. The **Criteria** tab opens for the report. Enter the **Start Date** and **End Date** for your report period.
6. Select **PharmaClik POS Product Transfer** from the **Reason** dropdown list.
7. Press or click the **Preview** button. (Optional)
8. Press or click the **Print** button.

See

PharmaClik Rx   **More>Help**

1. Open **PharmaClik Rx Reports**.
2. Press or click the **Help** button.
3. Press or click the **Contents** button.
4. Double-click the **Report Descriptions and Samples**.
5. Double-click the **Inventory Reports**.
6. Double-click the **Manual Adjustments**.

Finding DINs Flagged as PharmaClik POS Products

The **PharmaClik POS Products Report** lists DINs and pack sizes in the **Drug** folder that are flagged as PharmaClik POS Products. The On Hand provided for each PharmaClik POS Product is stock that is currently in Pharmacy inventory.

To generate the PharmaClik POS Products report:

1. Press or click the **More** button.
2. Press or click the **Reports**.
3. In the **Select a Report** window, highlight **PharmaClik POS Products Report**.
4. Press or click the **Next** button.
5. The **Sort Options** tab opens for the report. Select a sort option.
6. Press or click the **Preview** button. (Optional)
7. Press or click the **Print** button.

See

PharmaClik Rx   **More>Help**

1. Open **PharmaClik Rx Reports**.
2. Press or click the **Help** button.
3. Press or click the **Contents** button.
4. Double-click the **Report Descriptions and Samples**.
5. Double-click the **Inventory Reports**.
6. Double-click the **PharmaClik POS Products**.

Determining Prescription Usage for PharmaClik POS Products

The **Drug Movement and Drug Movement Totals** reports can provide prescription usage and gross profit data for DINs flagged as PharmaClik POS Products (i.e. products that are flagged for inventory transfer).

To generate the Drug Movement or Drug Movement Totals report for PharmaClik POS Products

1. Press or click the **More** button.
2. Press or click the **Reports**.
3. In the **Select a Report** window, highlight **Drug Movement or Drug Movement Totals**.
4. Press or click the **Next** button.
5. The **Criteria** tab opens for the report. Enter the **Start Date** and **End Date** for your report period.
6. Select the **PharmaClik POS Products** flag on the right side of the tab.
7. Press or click the **Preview** button. (Optional)
8. Press or click the **Print** button.

See

PharmaClik Rx   **More>Help**

1. Open **PharmaClik Rx Reports**.
2. Press or click the **Help** button.
3. Press or click the **Contents** button.
4. Double-click the **Report Descriptions and Samples**.
5. Double-click the **Accounting Reports**.
6. Double-click the **Drug Movement Totals**.

Examples of Products

The following are examples of PharmaClik POS Products, bulk items and Ostomy supplies.

PharmaClik POS Products are ordered through **PharmaClik POS Pro Front Shop** purchase orders; they are placed out on the sales floor and can now only be transferred to PharmaClik Rx inventory though the newly automated PharmaClik POS inventory transfer function.

Bulk items are tracked in regular PharmaClik Rx pharmacy inventory and are re-ordered on PharmaClik Rx purchase orders.

PharmaClik POS Products

This product is set up for PharmaClik POS inventory transfer.

The product is monitored. It has On Hand amount because inventory has already been transferred to PharmaClik POS.

The product is **monitored**.

It has **On Hand** amount because inventory has already been transferred from PharmaClik POS.

The **PharmaClik POS Size** is 1.

The **Main UPC** is populated.

Re-Order Point and **Re- Order #Packs** are blocked since PharmaClik POS Products are NOT re-ordered through PharmaClik Rx purchase orders.

The **PharmaClik POS Product** flag is ON. PharmaClik Rx transfers inventory from the front shop to fill prescriptions for these products.

Bulk Items

This is an example of a bulk item. It is monitored in regular PharmaClik Rx inventory and re-ordered through PharmaClik Rx.

The product is **monitored** in regular pharmacy (PharmaClik Rx) inventory.

It has **On Hand** amount.

The product has **Re-Order Point** and **Re-Order # Packs**, as it is reordered through PharmaClik Rx purchase orders.

The **PharmaClik POS Product** flag is *OFF*.

QUESTIONS & ANSWERS

Q1.   Can inventory be reset for on a PharmaClik POS Product?

NO. Resetting is not recommended for PharmaClik POS Products. Resetting inventory wipes out the product's PharmaClik POS Transfer history – all of the PharmaClik POS Product Transfer adjustments are deleted from the database, which means there is no audit history of transfers. Head Office uses the PharmaClik POS Product Transfer adjustments to compare PharmaClik Rx data with PharmaClik POS data. PharmaClik Rx will only reset a PharmaClik POS Product's inventory as a last resort, provided inventory cannot be corrected manually and all other adjustment options have been exhausted.

Q2.   How do I remove owe amounts from PharmaClik POS Products?

To remove an owe amount on a **PharmaClik POS Product**, create a manual adjustment in PharmaClik Rx to add inventory to the product and then reconcile the **Owe Amount**.

To create a manual adjustment:

1. Press or click the **Drug** button.
2. Search for and select the drug.
3. Press or click the **Inventory** tab.
4. Highlight the pack size to be adjusted.
5. Press or click the **Adjust** button.
6. In the **Adjustment** field, enter the unit quantity that is being added to inventory (i.e. the SAME quantity as the product's Owe Amount).
7. Select a **Reason** (e.g. Physical Count).
8. Enter a **Comment**. (Optional)
9. Update the **User** if necessary.
10. Press or click the **OK** button.

To reconcile the owe amount:

1. Press or click the magnifying glass button in the **Packs Available** section.
2. The **Shipments for Pack Size** window opens. Press or click the **Adjust Owe** button.
3. The **Owe Adjustment** window opens and the prescription is listed. Verify the **Prescription** column – it indicates the quantity owing on the prescription.
4. Press or click the **OK** button in the **Owe Adjustment** window.
5. Press or click the **OK** button in the **Shipments for Pack Size** window

Q3.   Why can't I choose PharmaClik POS Product Transfer as a manual adjustment reason?

The database uses two special manual adjustment reasons for PharmaClik POS inventory transfers. These cannot be selected when performing manual adjustments, as they are required to identify the automated set-up and transfer information between PharmaClik Rx and PharmaClik POS Pro. The reasons are:

- **PharmaClik POS Product Transfer** – Identifies the automated inventory transfers.
- **PharmaClik POS PharmaClik Rx Link Startup** – Identifies adjustments created when PharmaClik Rx was set up for **PharmaClik POS Inventory Transfer**.

Q4.   What happens when there is no communication between PharmaClik Rx and PharmaClik POS?

If PharmaClik Rx cannot connect to PharmaClik POS for an inventory transfer request, a prompt indicates that PharmaClik Rx cannot communicate with PharmaClik POS Pro. Communication must be re-established before any PharmaClik POS inventory transfers can take place.

If the prescription is in a batch, **Batch Profile** indicates **No PharmaClik POS Communication.**
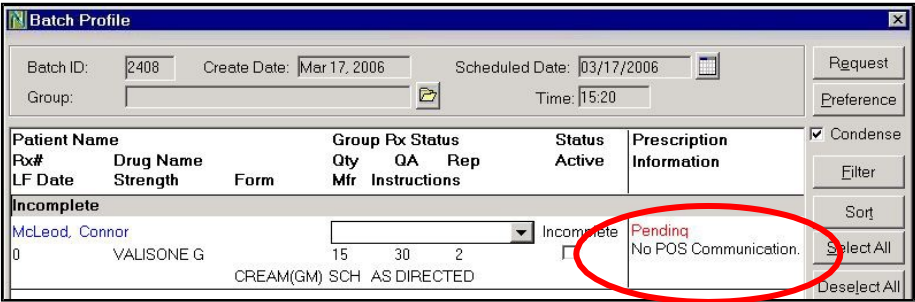
Q5.   What is the PharmaClik POS On Hand Values report?

PharmaClik POSOnhandvalue.txt is a one-time report that is generated when the PharmaClik Rx\PharmaClik POS link is first set up. Stores that monitor perpetual inventory on PharmaClik POS can use this report to update inventory quantities in PharmaClik POS Pro.

3. PharmaClik POS Accounts Receivable Posting

PharmaClik Rx/PharmaClik POS Pro integration provides real-time PharmaClik Rx Accounts Receivables posting to PharmaClik POS Pro when filling prescriptions. This allows the Cash portion of a prescription to be billed to a patient's PharmaClik POS charge account.
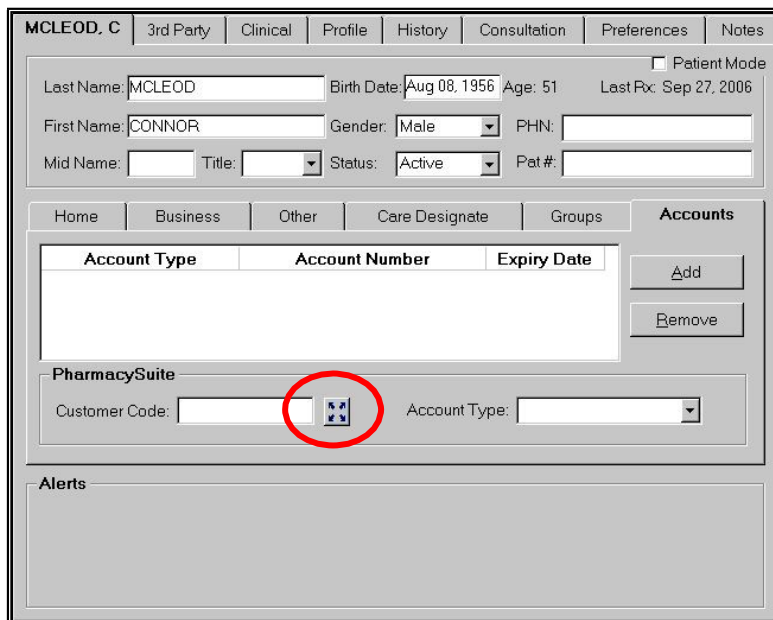
Configuring an Accounts Receivable Patient

The PharmaClik Rx fields used for Accounts Receivable posting are located in the Patient folder. Patients are linked to a PharmaClik POS charge account through the Accounts Receivable third party and a PharmaClik POS Customer Code. The patient must first be set up with a customer account in PharmaClik POS Pro. One Accounts Receivable plan can be added per patient.

A total of 37 Accounts Receivable plan codes are available, with **AR** as the general plan code and the additional codes being XA through to XZ, and X0 to X9. The plan names can be customized in List Maintenance and pricing rules can be set per plan (refer to 'Getting Started on Accounts Receivable').

To set up Accounts Receivable for a patient

1. Press or click the **Patient** button.
2. Search for and select the patient.
3. Press or click the **Accounts** tab.

4. Press or click the expand button ⊞ to search for the patient's account code in PharmaClik POS Pro.

5. The **Search** window opens and immediately searches for the patient's information in **PharmaClik POS Pro**. The search uses information from the **Patient** folder: Last Name, First Name, Address Line 1 and/or Phone Number. The top of the search window indicates the application in which you are searching (PharmaClik POS Pro or BusinessVision – in the example here it is PharmaClik POS Pro).

TIP If PharmaClik Rx cannot communicate with PharmaClik POS Pro, a prompt indicates 'No PharmaClik POS Communication'
– Press or click the **OK** in the prompt. Communication must be re-established before you can continue searching in PharmaClik POS Pro. Refer to the *Questions & Answers* section at the end of this document for further details.

6.   The search results are displayed in the bottom portion of the screen. Highlight the appropriate patient (if there are multiples) and press or click the **OK** button. This is similar to all PharmaClik Rx search screens.
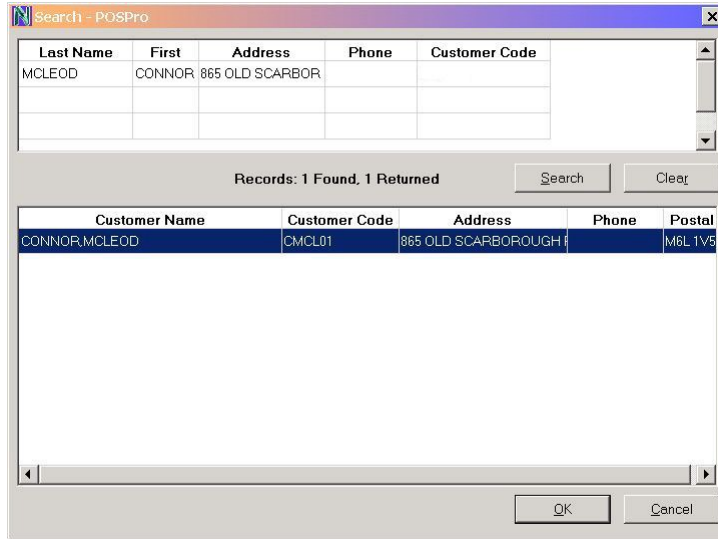
TIP: If search results are returned, but the correct patient is not displayed, modify the search criteria and press or click the **Search** button to initiate a new search.

7.   The screen returns to the **Patient** folder and the **Customer Code** is populated (Note: The **Customer Code is** CASE SENSITIVE) – DO NOT MODIFY THE CUSTOMER CODE. Make a selection from the **Account Type** dropdown**.**
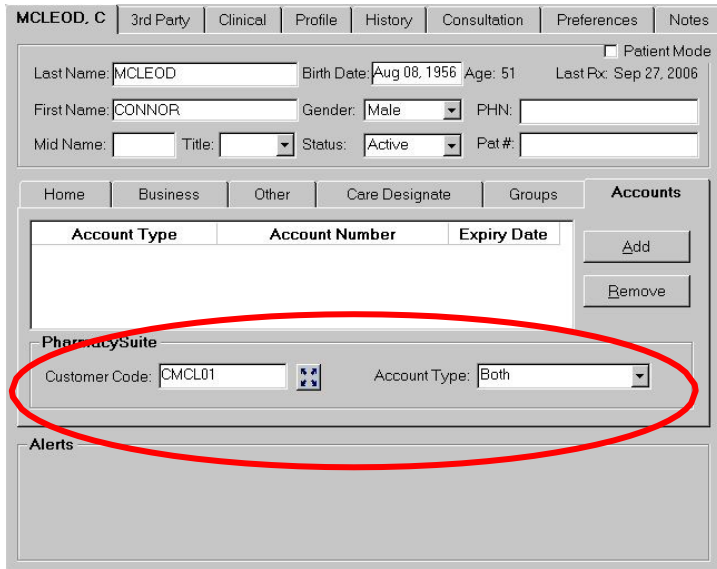
8.   Press or click the **Save** button.
9.   Press or click the **3rd Party** tab.
10. Press or click the **Add** button.
11. Search for and select the appropriate **Accounts Receivable** plan in **Third Party Search**. The plan is added to the **Third Party** tab. (Note: This is the same process as adding a regular third party to the Patient's folder).

12. Press or click the **Save** button.

   TIP You cannot add the **AR** third party to a patient without entering the Customer Code. This
   information is used for **Accounts Receivable** posting; therefore it is critical that the
   Customer Code be accurate.

The **Accounts Receivable** third party is ranked as the patient's second last third party – it will always
be listed before **Cash (CA)** in both the **Patient** folder **Third Party** tab and in prescription billing codes.
This ensures the **Patient Pays** amount is posted to **Accounts Receivable** instead of to CA.
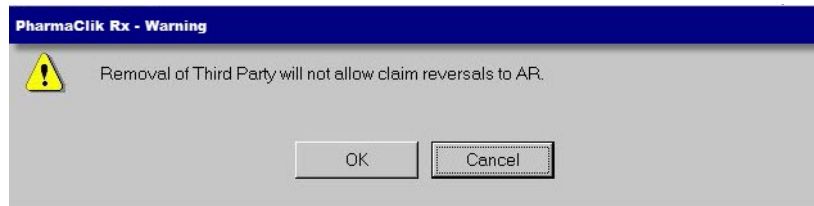
Removing Accounts Receivable from a Patient

When a patient no longer requires **Accounts Receivable** posting, the **Accounts Receivable** third
party should be removed from the patient's list of third parties and the patient's Customer Code must
be removed.

TRANSACTIONS CAN NO LONGER BE POSTED TO THE CUSTOMER'S ACCOUNT when the
Accounts Receivable plan is removed from a patient. This means existing prescriptions billed to
Accounts Receivable cannot be cancelled or rebilled.

To remove Accounts Receivable from a patient:

1. Press or click the **Patient** button.
2. Search for and select the patient.
3. The patient's folder opens. Press or click the **3rd Party** tab.
4. Highlight the **Accounts Receivable** plan in the list of third parties.
5. Press or click the **Remove** button.
6. The following prompt appears. Press or click the **OK** button to continue.

7. The **Accounts Receivable** plan is removed from the list of third parties. Press or click the
   Save button.
8. Press or click the main tab in the **Patient** folder.
9. Press or click the **Accounts** tab.
10. Delete the value in the **Customer Code** field.
11. Delete the value in the **Account Type** field.
12. Press or click the **Save** button.

Filling Prescriptions

When a prescription for an **Accounts Receivable** patient is opened in the **Rx Detail**, PharmaClik Rx
queries PharmaClik POS Pro to determine the status of the patient's charge account. The query uses
the Customer Code and Account Type set in the **Patient** folder.

Note: In the examples below, 'AR' refers to any Accounts Receivable plan code.

When the Account is in Good Standing

When the patient's account is in good standing, AR is included in the prescription's billing code. This
allows the **Patient Pays** amount to be billed to AR instead of to Cash.

Example: A patient's third parties are EP/AR/CA and the AR account is in good standing in PharmaClik POS Pro. When a prescription opens in the **Rx Detail**, the billing code will be EP/AR/CA.

When the Account is Not in Good Standing

There are several reasons why an account may not be in good standing; the account could be on hold, over the credit limit or payment could be overdue.

When an account is not in good standing, AR is automatically dropped from the prescription's billing code. An alert is displayed in the **Rx Detail**, explaining why the prescription cannot be billed to AR.

If the account is…	The Rx Detail alert indicates…	
On Hold	AR account is on HOLD.	
Overdue	AR account is XXX DAYS OVERDUE.	**Note:** XXX is the number of days overdue (30, 60, 90, etc…)
Over the Credit Limit	AR account is OVER CREDIT LIMIT.	

Example: A patient's third parties are EP/AR/CA and the AR account is 60 days overdue in PharmaClik POS Pro. When a prescription opens in Rx Detail, the billing code is EP/CA (AR is dropped from the billing code) and Alerts indicates 'AR account is 60 DAYS OVERDUE'. The prescription cannot be billed to AR at this time – to fill the prescription immediately, it must be billed to EP/CA.

If you wish to charge the cash portion of the prescription to AR, you must first rectify the issue in PharmaClik POS Pro, and then process or rebill the prescription in PharmaClik Rx.

Billing a Prescription to Accounts Receivable

When a prescription contains AR in the billing code, the **Patient Pays** amount is submitted to AR instead of Cash.
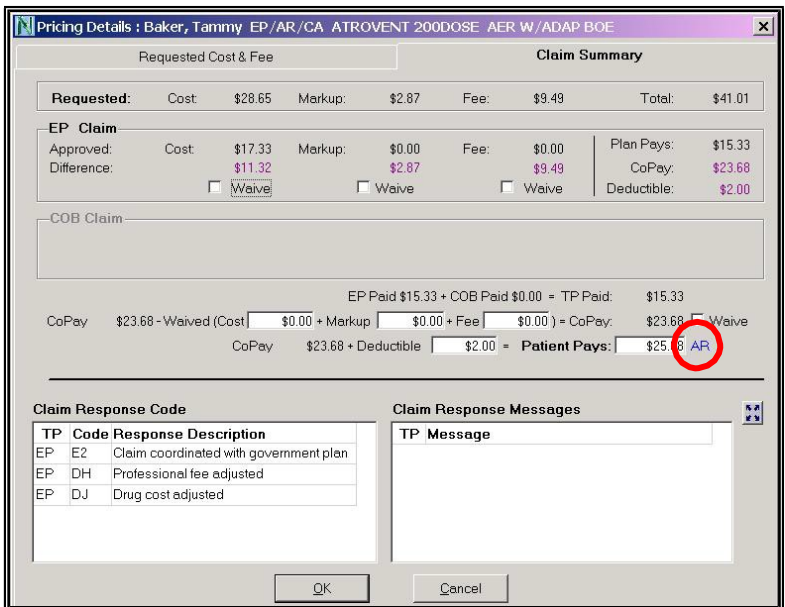
AR is displayed beside the **Patient Pays** field when the **Claim Summary** appears.

The amount in the **Patient Pays** field will be billed to AR.

At this point, you can waive any necessary amounts, nothing has been billed to AR.

The amount in the **Patient Pays** will be billed to AR once you press or click the **OK** button.

What Prints on the Label Set?

The **Privacy Label** prints Patient Pays $0.00 because nothing will be collected from the patient when the prescription is picked up.

The Patient Pays on the RECEIPT is the amount charged to AR, allowing the patient to manually submit the Receipt to his or her insurance plan (e.g. the receipt prints Patient Pays $12.50 for the prescription shown above).

Getting Started on Accounts Receivable

Before assigning any patients to Accounts Receivable plans, determine if you will be using multiple plan codes (e.g. use a different code for each LTC Facility), and if any pricing rules are required.

Customizing Accounts Receivable Plans

Accounts Receivable Preferences in List Maintenance allows the Plan Name for each Accounts Receivable plan to be customized, and therefore easily identified throughout PharmaClik Rx.

1. Press or click the **More** button.
2. Press or click the **List Maint.** The **List Maintenance** window opens**.**
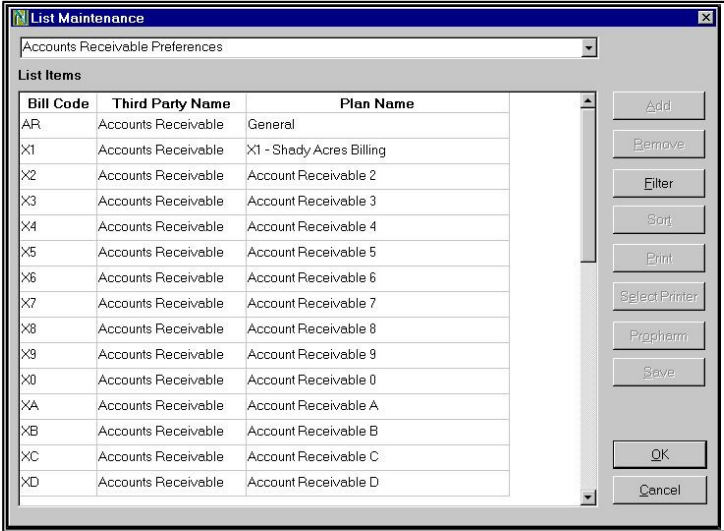
3. Select the **Accounts Receivable Preferences** from the dropdown list at the top of the window.
4. Highlight the **Accounts Receivable** plan that is to be customized.
5. Enter the customized name in the **Plan Name** field for the corresponding Bill Code.
6. Press or click the **OK** button to save changes and close the window.

TIP When customizing the **Plan Name**, enter the bill code in front of the name to ensure it is easily identified in other areas of the application (e.g. when setting up pricing rules). For example, if XW is set up as for billing patients in Winsome Woods Nursing Home, enter the Plan Name as **XW - Winsome Woods**.

Setting up Pricing Rules for Accounts Receivable

Pricing rules can be set for **Accounts Receivable** in general, as well as for each **Accounts Receivable** plan. As with all other third parties, pricing rules are set in the **Pricing** and **Variable Pricing** tabs located in the **Pharmacy** folder.

1. Press or click the **More** button.
2. Press or click the **Pharmacy**.
3. Press or click the **Pricing** tab to access standard pricing rules, or press or click the **Var. Pricing** tab to access variable pricing rules.
4. Enter pricing rules as required.
5. Press or click the **Save** button to save your changes.

Refer to the **PharmaClik Rx Help** for more information on **Pricing**.

1. Press or click **More** button.
2. Press or click **Help**. The **PharmaClik Rx Help** window opens.
3. Press or click **Contents** button. The **Contents** window opens.
4. Highlight **Pricing Methods**.
5. Press or click **Open** button.
6. Highlight **How PharmaClik Rx Calculated a Prescription's Price**. There are options for **Setting up Pharmacy Pricing Methods** and **Setting up Variable Pricing Methods**.
7. Press or click the topic you desire to view. The selected topic opens.

Setting AR Overdue Days Validation

The **PharmacySuite Preferences** provide the ability to set overdue days validation checking for both retail and non-retail prescriptions. For example, you may want to be warned when a retail patient's **Accounts Receivable** plan is overdue, but you may not be concerned about non-retail patients. In this case, **AR Overdue Days Validation** allows you to suppress the 'AR account is XXX DAYS OVERDUE' Rx Detail alert for Nursing Home and other types of non-retail patients.

1. Press or click the **More** button.
2. Press or click the **Pharmacy**.
3. Press or click the **Pharmacy** tab.
4. Press or click the **PharmacySuite** button. The **PharmacySuite Preferences** window opens.
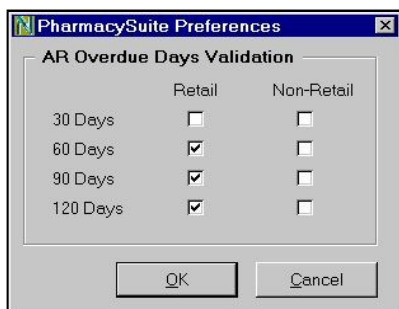
5. In the **Retail** column, choose the minimum number of days for which you would like to be warned if the patient's account is overdue; all other days above the minimum become selected as well (e.g. if you choose 60 Days, the checkboxes for 90 Days and 120 Days are automatically selected).
6. To be warned of overdue plans for non-retail prescriptions, make the necessary selections in the **Non-Retail** column. Leave the column blank if you do not wish to be warned for non-retail prescriptions.
7. Press or click the **OK** button.

Setting an Accounts Receivable Plan as a Group's Default Billing Code

When an **Accounts Receivable** plan is set as a group's default billing code, all new patients added to the group are automatically assigned that **Accounts Receivable** plan. This ensures the patients are assigned to the appropriate plan for that group, and is useful if specific pricing rules are used for a group's **Accounts Receivable** plan.

1. Press or click the **More** button.
2. Press or click the **Groups**.
3. Search for and select the group.
4. Press or click the **Preferences** tab.

5. Select the appropriate **Accounts Receivable** plan code from the **Default Billing Code** field.
6. Press or click the **Save** button.

Note The default billing code only applies to patients newly added to the group.

You must manually add the appropriate **Accounts Receivable** billing code to all patients who already belong to the group.

Running Batches for Groups

The **first time you run a batch for a group** after moving to **Accounts Receivable Posting**, the pharmacy preference **Reset Billing code on Refill** must be *ON* to ensure prescriptions reset to include AR when it is first added to the patient:

1. Press or click the **More** button.
2. Press the **Pharmacy**.
3. Press or click the **Rx Detail** tab.
4. **Reset Billing Code on Refill** is located on the left side of the tab. If **Reset Billing Code on Refill** is *OFF*, select the checkbox to turn it *ON*.
5. Press or click the **Save** button.

After the batch completes: Turn *OFF* **Reset Billing Code on Refill** – this ensures the appropriate billing code is retained for prescriptions on all subsequent batches.

Verifying Customer AR Statements

For the **first month after conversation**, it is recommended that you compare the **Customer AR Statements** to the **PharmaClik Rx Patient Office Receipt Report**.

Generate a **Patient Official Receipt Report** in PharmaClik Rx for the same time period as your **Customer AR Statement** from PharmaClik POS. Follow these steps to run the **Patient Official Receipt** report:

1. Open the **PharmaClik Rx Reports**.
2. Highlight the **Patient** on the left side of the **Select a Report** window.
3. Highlight the **Patient Official Receipt** on the right side of the **Select a Report** window
4. Press or click the **Next** button. The **Criteria** tab opens for the **Patient Official Receipt** report.
5. Enter a **Start Date** and **End Date** to match the **Customer AR Statements**.
6. Enter the name of the group in the **Group** field.
7. Press or click the **Preview** button. If the **Group Search** window appears, search for and select the group.
8. The report is displayed in the **Preview** window. Press or click the **Print** button.

Once both reports have been generated, **BEFORE** any statements are sent out, cross-reference both reports to ensure that no billings have been missed. Correct any billings where required, using the *Troubleshooting Tips* below.

Troubleshooting Tips

If a billing is on the **Patient Official Receipt Report** and not on the **Customer AR Statement**:

•   For any missing prescriptions, open the prescription in the **Rx Detail** and check the **Alerts** section for any alerts pertaining to the customer account (e.g. AR is OVER CREDIT LIMIT). Make any necessary adjustments to the customer's credit limit in the PharmaClik POS system, and then rebill the prescription.

•   Verify if the customer code in PharmaClik Rx matches the customer code in PharmaClik POS. Make any necessary corrections to the code in PharmaClik Rx.

•   Ensure the AR bill code is flagged as Active in the **Patient's Third Party** tab: Open the patient's folder; press the **Third Party** tab; at the top of the tab, verify if the **Active** checkbox is *ON* for the AR row. If **Active** is *OFF*, select the checkbox to turn it *ON* and then press or click the **Save** button.

Checking the ATM

Accounting Transaction Management (ATM) handles all communication between PharmaClik Rx and PharmaClik POS. To ensure all transactions are successfully transmitted to PharmaClik POS, staff should regularly check ATM to ensure all transactions are status Complete or Cancelled.

The transactions occurring between PharmaClik Rx and PharmaClik POS are a concept similar to prescription claims to third parties—you must resubmit any unsuccessful claims until they are accepted; in this case, you must ensure all transactions submitted to PharmaClik POS are Completed or Cancelled.

IMPORTANT	There should never be any Failed or Incomplete transactions in ATM. **Check ATM daily** to ensure all information is correctly updated in PharmaClik POS.
	Always check ATM before closing a period in PharmaClik POS.

To check the ATM:

1. Press or click the **More** button.
2. Press or click the **Housekeeping**.
3. Press or click the **Accounting.**

   **TIP**   The **Housekeeping and Accounting** buttons will be disabled if the user currently logged onto PharmaClik Rx is not authorized to access **Housekeeping** or **PharmacySuite**.The **Accounting Transaction Management** (ATM) window opens.
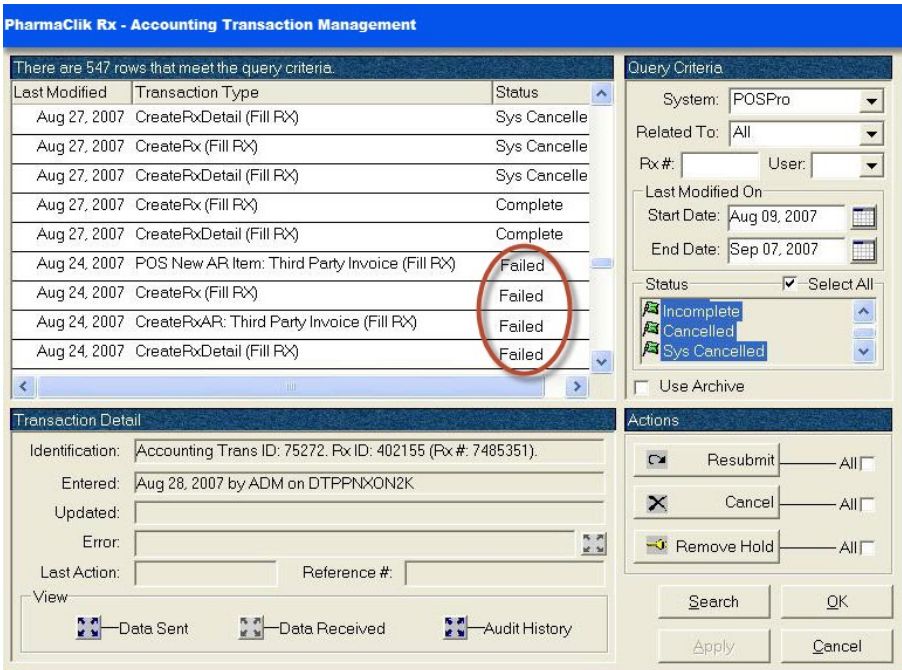
All **transactions are listed** on the upper left side of the window.

The **Status** column indicates if transactions are Failed or Incomplete.

4. To find **Failed** and **Incomplete** transactions, enter the following under the **Query Criteria** (the Query Criteria should appear the same as this picture):

    a) System = **PharmaClik POS Pro**
    b) Related To = **All**
    c) Rx# and User must both be blank.
    d) Enter a **Start Date** and **End Date**.

        •   The **Start Date** should be the last date ATM was checked

        •   The **End Date** should be today's date.

    e) In the **Status** box, scroll down until you see **Failed** and **Incomplete**.

        •   Highlight **Failed**.

        •   Hold down the CTRL key on the keyboard and highlight **Incomplete**.
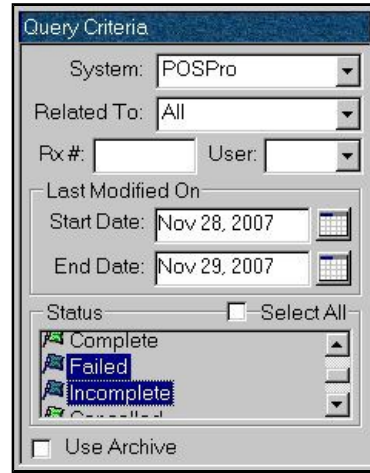
        Both statuses should now be highlighted.

5. Press or click the **Search** button located on the lower right side of the window.
    ATM refreshes and only **Failed** and **Incomplete** transactions are listed.

6. Select the **All** checkbox located to the right of the **Resubmit** button (all transactions listed in the window are selected).
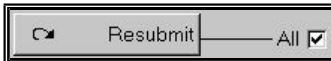
7. Press or click **Resubmit**.
    All **Failed** and **Incomplete** transactions are resubmitted to PharmaClik POS.

8. Press or click the **Search** button to refresh the list of transactions.
    •   Some of the previously Failed transactions may become Incomplete.
    •   If this occurs, refresh by pressing or clicking the **Search** button again.

9. If there are still Incomplete transactions in the list after refreshing, press or click the **Cancel** button to close ATM.
    •   Repeat steps 1–9.
    •   Contact Pharmacy Relations if the Incomplete transactions are still listed.

QUESTIONS & ANSWERS

Q1. What happens when there is no communication between PharmaClik Rx and PharmaClik POS?

You cannot bill to AR if there is no communication between PharmaClik Rx and PharmaClik POS Pro, nor can you query PharmaClik POS Pro for customer account codes. Communication must be re-established before processing any transactions related to **Accounts Receivable** posting.

When searching for customer account codes
When searching for customer account codes in the **Patient** folder **Accounts** tab, the following prompt appears in the **Search – PharmaClik POS** if there is no communication with PharmaClik POS Pro.

Press or click the **OK** button in the prompt.
Once communication is re-established, press or click the **Search** button in the **Search – PharmaClik POS** to send the search query to **PharmaClik POS Pro** a second time (an example of the Search – PharmaClik POS window is shown at the top of page 2).

When filling prescriptions
A prompt appears in the **Rx Detail**, indicating *PharmaClik Rx cannot communicate with the other PharmacySuite applications. Bill Code is changed from AR/CA to CA to include all the eligible plans*.

If Multi-Fill is used for an AR prescription and there is no communication: The prescription becomes Complete in PharmaClik Rx, but it is stored in the **Accounting Transaction Manager** (ATM). Follow these steps to retrieve the Rx from ATM and submit the transaction to PharmaClik POS Pro:

1. Press or click the **More** button.
2. Press or click the **Housekeeping**.
3. Press or click the **Accounting**. The **ATM** window opens.
4. Search for a **Failed** status by scrolling through the list of transactions on the left side of the window
   • If you know the prescription number, enter the **Rx#** under the **Query Criteria** and then press or click the **Search** button located on the lower right side of the window.
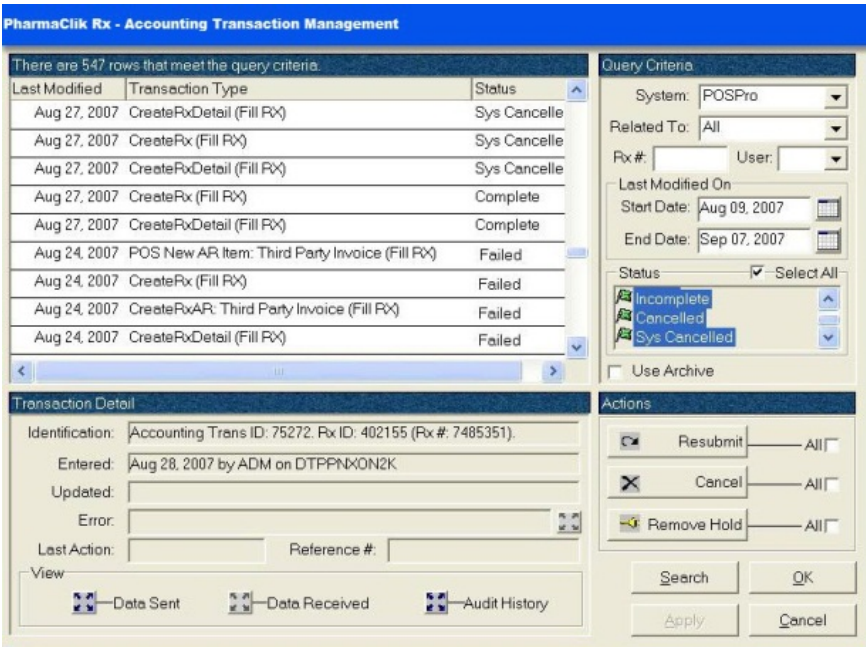
5. In the list of transactions, highlight the **Failed** row (only one row can be highlighted at a time). Press or click the **Resubmit** button located on the lower right side of the window.
6. Press or click the **Search** button to refresh the list of transactions.
7. Repeat steps 4-6 for each Failed transaction.

When Processing Prescriptions in a Batch

If the prescription is in a batch, the **Prescription Information** column in **Batch Profile** indicates *No PharmaClik POS Communication* and the status will be **Pending**.
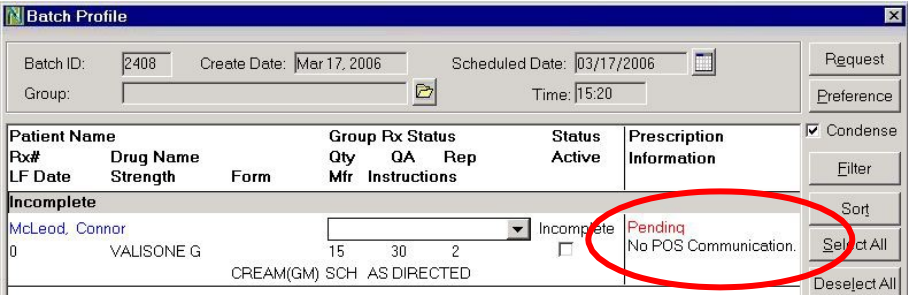
Q2. **When searching for a Customer Code in PharmaClik POS Pro, how do you know if the correct patient is displayed in the search results?**

In addition to the Customer Code and the customer's name, the search results returned from PharmaClik POS Pro in include the patient's address, telephone number and postal code. If this is still not enough information to differentiate between patients with the same name, the best solution is to manually look up the patient's account in PharmaClik POS Pro.

Q3. How do I change an existing Accounts Receivable patient to a different Accounts Receivable code (e.g. change a patient from AR to XW)?

IMPORTANT	Before changing a patient's existing Accounts Receivable plan, ensure all billings have been successfully and accurately posted to the patient's account in PharmaClik POS.
	Once the new plan is added, **prescriptions billed to the previous accounts receivable plan cannot be cancelled, or rebilled.**

Since a patient can only subscribe to one **Accounts Receivable** plan, the existing plan must be removed from the patient's folder before the new plan can be added. It is not necessary to re-enter the patient's Customer Code.

1. Open the patient's folder.
2. Press or click the **3rd Party** tab.
3. In the list of third parties, highlight the **Accounts Receivable** plan to be removed.
4. Press or click the **Remove** button.
   A prompt indicates *Remove of Third Party will not allow claim reversals to AR* (where 'AR' is the plan that is being removed).
5. Press or click the **OK** button to continue.
   The **Accounts Receivable** plan is removed from the list of third parties.
6. Press or click the **Save** button.
7. Press or click the **Add** button.
8. Search for and select the new **Accounts Receivable** plan in **Third Party Search**. The new plan is added to the **Third Party** tab.
9. Press or click the **Save** button.

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