Pharmaserv® 101: Introduction to Prescription Processing

Student Workbook

This workbook accompanies the Pharmaserv Instructor-Led Training Class

Produced in Cork, Ireland
Welcome to an Engaging, Hands-On Learning Experience!

What to Expect

This workbook is used with the Pharmaserv Instructor Led Training (ILT) Class. This ILT is not meant to cover every function of the system. This class is meant to give you a good foundation to build on.

Your instructor will demonstrate features of Pharmaserv, and then allow time for you to practice what you’ve learned. If you are attending the class virtually, your instructor will be able to see and monitor your progress and guide you if you have questions or need help.

About This Workbook

This workbook includes the following:

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<th>Demo page</th>
<th>Practice Summary</th>
<th>Step-by-Step Help</th>
<th>Reference Cards</th>
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<tr>
<td>Contains notes and diagrams; can be used to follow along with the instructor’s demonstration</td>
<td>Provides the scenario for the practice. This can be used alone if you want to try the exercises with minimal guidance.</td>
<td>Available for each practice if you want to follow an exercise in a guided manner.</td>
<td>Quick Reference guides for additional features.</td>
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Before Attending Class

You should have received instructions on accessing the McKesson Pharmacy Systems Training Portal.
You can access the Training Portal at http://learning.mckesson.com

Prior to your class, be sure to go to the website and complete the self-paced course, “Class Prerequisites” (approximately 1 hour total duration).
How to Join the Virtual Class
The class will start and end on time to respect the schedules of all the students involved.

**GET INFORMATION FROM YOUR TRAINING EMAIL:**

1. Retrieve the email you received regarding your scheduled training.
2. Dial the toll-free number for the audio conference. When prompted, enter the conference code.
3. Click on the session hyperlink to open the session website.

**JOIN THE LAB:**

A webpage opens with a description of the session.

1. In the **Join Session Now** area, type your name and email address.
2. Click on the **Join Now** button.
3. Wait while your computer connects to the session. The **Session In Progress** message displays during this time.
4. Please accept any requests to download required software.
5. After you’ve successfully joined the session, the Teleconference window opens. Click **OK** to dismiss the window.

You are now ready for class. Wait for further instructions from your instructor.
**Training Tips and Information**

Don’t underestimate the importance of keyboarding and using shortcut keys instead of your mouse!

The instructor may rely heavily on the mouse for the demonstrations so that you can see what is happening. However, Pharmaserv provides many shortcuts that make prescription filling quicker. Whenever possible, *try out the shortcut key combinations rather than relying on your mouse.*

In this document, keyboard shortcuts will be shown in brackets, e.g. `[Enter]` or `[F2]`.

**Variations and Customizations:**
Customization decisions made by your organization affect the workflow, system functionality and features of Pharmaserv. Your trainer will incorporate many of these business decisions into this training session. There are some circumstances where these options may differ between training and production due to decision changes or training environment limitations.

**Important Note:**
The examples contained in this course are designed to build on one another. It is important that you are present for all examples to ensure an effective and complete learning experience.

**Patient Family Assignment:**
Please remember to only use patients assigned to you during training. This will preserve other participant’s examples for their own use.

Circle the family that you have been assigned to process prescriptions for:

- Lee
- Harris
- Taylor
- Williams
- Davis
- Johnson
- Garcia
- Clark
- Anderson
- Robinson

*(Names selected from the most common names in US. Source: census.gov.)*
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What to Expect from this Class

This handout is used with the Pharmaserv Instructor-Led class. You can follow along with the notes and steps shown as the instructor explains and demonstrates features of Pharmaserv.

Before Attending Class (Prerequisites)

You should have received instructions on logging in and using the McKesson Training Portal http://learning.mckesson.com to complete the prerequisite Computer-Based Training.

About This Workbook

This workbook includes:

- Demo page for each topic: Contains notes and graphics relating to the topic.
- Step-by-Step practice pages: Available for each demonstration to follow along in a guided manner.

Training Tips and Information

1. The focus of this class is basic prescription filling.
   This class is not meant to cover every function of Pharmaserv.

2. This class is only one part of the Pharmaserv training solution.
   In addition to the Computer-Based Training and Instructor-Led class, there will be additional learning opportunities available to you later. This class is meant to give you a good foundation.

3. If you have questions that are not within the scope of the class, the instructor may defer the answer until later.
   In order to meet the training goals for this session in the allotted time, your instructor may ask you to save your questions for the Q&A period of the class or ask you to limit the questions to the topic at hand. The instructor may defer any questions unique to your particular store or situation until later.

4. Don’t underestimate the importance of keyboarding and using shortcut keys instead of your mouse!
   The instructor will rely heavily on the mouse for the demonstrations so that you can see what is happening. However, Pharmaserv provides many shortcuts that make prescription filling quicker.

In this document, keyboard shortcuts will be shown in brackets, e.g. [Enter] or [Ctrl+R].
**The Three Applications**

**You will learn how to:**

- Understand the Rx Processing, Pharmaserv, and Pharmaserv Administration applications
- Use the Single Sign On menu to launch and close applications

**Some Important Points:**

Pharmaserv is made up of 3 applications:

- **Pharmaserv Administration** is where the store administrator will set system preferences and maintain users.
- **The Rx Processing Application** is where you can maintain patient, prescriber, and third party information, and to enter prescriptions.
- **The Pharmaserv application** is where you can access optional modules such as Reports, Navigator, A/R, and Rx Tracker.

These applications can be opened by using desktop shortcut icons, through buttons on each application toolbar, or through the Single Sign-On menu.

The easiest way to manage the launching and signing out of applications is through the Single Sign On menu:

When more than one application is open, you can use the keyboard shortcut **Alt + Tab** to change to another application.
Logging In

You will learn how to:

- Start the Remote Desktop session of the server
- Log in
- View the status of Medi-Span updates
- Navigate using shortcut keys

Some Important Points:

The Medi-Span Disclaimer window contains information about the status of the Medi-Span updates. The window title bar will indicate if the updates are current, in the grace period, or expired.
Practice Steps:  Log In

**START A PHARMASERV REMOTE SESSION:**

1. From the desktop, double-click on the Pharmaserv Remote icon.

**ENTER USERNAME AND PASSWORD:**

1. Type the Logon ID and Password (assigned by your system administrator).
2. Select OK [Enter].

   Username: Tech
   Password: Tech

**START RX PROCESSING:**

The Pharmaserv application opens.

1. On the Pharmaserv horizontal toolbar, select the Rx Processing icon to open up the Rx Processing application.

**ACKNOWLEDGE MEDI-SPAN MESSAGE:**

The Medi-Span module initializes and a message box displays.

1. Select the OK button.
2. The Rx Processing window opens.
Rx Processing Toolbars and Navigation

You will learn how to:

- Use the horizontal and vertical toolbars in Rx Processing
- Navigate using keyboard shortcuts

Some Important Points:

Main Menu Bar (at top of window):
- To select an option in a drop-down menu, just select the corresponding underlined letter.
  For example: Press Alt+B to open the Bill menu, then press B to select Batch Billing.

Horizontal Toolbar (at top of window):
- The Horizontal Toolbar will always display at the top of every window during Rx Processing.
Vertical Toolbar (at left side of window):

- The **Notes** and **Maintenance** buttons on the vertical toolbar are standard throughout the application.
- Any buttons not available have the universal “No” symbol over the button.
- Buttons can be selected by pressing and holding the Alt key + the underlined letter. For example, to select the **Notes** button use Alt+N (hold down Alt and press N).
- When the **Notes** button is selected, you can enter notes specific to the window that you are using.
- The **Maint** button opens the appropriate Maintenance window. For example, if any of the address fields have focus and this button is selected, the Address Maintenance window opens. If you place the focus on the **Instr** or **Single Line Edit** field for an Rx, and then select the **Maint** button, the Signa Code Maintenance window opens enabling you to enter a new Sig Code.
Creating a New Patient

You will learn how to:

- Search for and add a new patient

Some important points:

- You may search for patients with a partial first name and partial last name as well as other search criteria, including date of birth and telephone number.
- Required fields are highlighted in amber.
- It is recommended that when entering names with hyphens and apostrophes, utilize a space or omit the hyphens and apostrophes.
- When entering dates, they must be entered in the format of MM/DD/YYYY—separated by either a dash (-) a dot (.) or a slash (/).

![Image of the Pharmaserv 7.5.0 interface with a form for creating a new patient. The form includes fields for last name, first name, phone, and DOB. There is a highlighted button labeled "New Pat."
Practice Steps: Create a New Patient

- Remember: when entering dates, they must be entered in the format of MM/DD/YYYY—separated by either a dash (-) a dot (.) or a slash (/).

**SEARCH FOR THE PATIENT:**

1. From the menu bar select **Patient** [Ctrl+R].
2. Type part of the patient’s name or the date of birth.
3. Select the **Retrieve** button [Enter] to verify the patient is not currently in your database.
4. Select the **New Pat** button to open the Patient Maintenance window. The last name displays as you typed it in the previous window.

**ENTER PATIENT DATA:**

1. Input the Patients Last, First, MI, Sfx., and Sex fields.
2. A window will populate when you tab past the Sex field. Family Linking is an available option, please select **New**.
3. Input the Address information. Note: the city field auto fills with the city of your Pharmacy.
4. Input the phone number, area code in the first field, seven-digit number in the second field, and extension in the third field.
5. Input Patients Date of Birth. (MM/DD/YYYY)
6. Select **Save**
Cash Prescriptions

You will learn how to:

- Process a simple cash prescription
- Dispense a generic or a brand name product

Some Important Points:

To quickly open the select Patient option press Ctrl+R.

Use the Tab key to move from field to field.

Color coding of fields help you identify the field type:

- **Gray** = Read-only restricted field
- **Amber** = Required field that also contains a red asterisk by the field name
- **White** = Optional field
- **Yellow** = Field cannot be edited on the current window but can be edited through the appropriate maintenance option (e.g. Allergy field can be edited through patient maintenance)

In a Live Pharmacy, every effort should be made to scan the Hard Copy Prescription; due to the limitations of this environment we will NOT be able to scan Hard Copy images.
Practice Steps:  Fill a Cash Prescription

Mike
(Team Name)  Cash
customer

A customer has dropped off a new prescription for an existing patient.

The patient would like to purchase the generic.

SEARCH FOR THE PATIENT:

1. From the menu bar select Patient [Ctrl+R].

2. Type part of the patient’s name or the date of birth.

3. Select the Retrieve button [Enter].

4. Highlight the patient name in the results list.

START A NEW RX:

1. With the patient highlighted, select the New Rx button [Alt+W].

SELECT COVERAGE TYPE:

1. Verify that the correct coverage type is in the Cvg field (Cash). Use the drop-down to make a change if necessary.
**Practice Steps: Fill a Cash Prescription**

**SEARCH FOR THE WRITTEN PRODUCT:**

(Use the Tab key to move from field to field. This will ensure that all fields are reviewed to the hard copy.)

1. In the **Item** field, type the product name, NDC number, or supplier order number then press Tab.

2. Highlight the item in the results list then select OK [Enter].

**SUBSTITUTE THE GENERIC PRODUCT:**

If generics are available, a list will automatically display.

1. Continue with the product you selected previously or, highlight a generic in the results list then select OK [Enter].

**COMPLETE THE RX DETAILS:**

1. In the **DAW** drop-down box, update the DAW code if necessary.

2. In the **Prescriber** field, type a few letters of the last name then press Tab to search.

3. Highlight the prescriber in the results list then select OK [Enter].

4. Type the quantity written in the **QtyW** field. If the dispense quantity is different than the written quantity, change the **QtyD** field.

5. Type the number of refills authorized.

6. Complete the SIG.
   a. Use the **Instr** drop-down box to make a selection for the SIG pre-instruction (i.e. T for “Take 1 tablet”).
   b. In the following field, enter any additional codes separated by a semi-colon (i.e. PO;BID).

   The SIG displays as it will print on the label.

7. Verify the information in the Days Supply, Rx Origin, Written Date, and Dispensed Date fields.
Practice Steps: Fill a Cash Prescription

**VERIFY AND SAVE THE RX:**

1. Verify that all the Rx details have been entered correctly.
2. Verify or select the RPh and Tech initials as applicable for sign-off.
3. Select the Save button [Alt+S].
   The Label and Bill window opens.

**LABEL AND BILL:**

1. Verify that Cvg is set to Bill Now as Cash.
2. Select OK [Enter] to process the Rx and print the label.

Notes or questions:

___________________________________________________________________________

___________________________________________________________________________

___________________________________________________________________________

___________________________________________________________________________

___________________________________________________________________________

___________________________________________________________________________

___________________________________________________________________________
Third-Party Prescriptions (Paid Claims)

You will learn how to:

- Add insurance information for a patient
- Process a third-party prescription

Some Important Points:

The most effective method of searching for an insurance carrier is to search by the BIN number.

Use the Maintenance option to add patient insurance information to the Carrier Coverage area.
Practice Steps: Fill a Third Party Prescription (Paid Claim)

A customer has dropped off a new prescription for an existing patient.

He has a new insurance card.

The insurance information needs to be added and the prescription billed to the third party.

**Search for the Patient:**

1. From the menu bar select Patient [Ctrl+R].

2. Type part of the patient’s name or the date of birth.

3. Select the Retrieve button [Enter].

4. Highlight the patient name in the results list.

5. Select the Patient Maint button [Alt+M].

**Open Patient Carrier Maintenance:**

1. Click in the yellow 3 Carrier Cvg area [Alt+3]. A field with a dotted outline will appear in the Carrier Cvg box.

2. Select the Maint button in the side toolbar [Alt+M]. The Patient Coverage Summary opens.
Practice Steps: Fill a Third-Party Prescription (Paid Claim)

**ADD INSURANCE INFO:**

1. Select the **Add** button [Alt+A].
2. Type the BIN number or other search criteria.
3. Select the **Retrieve** button to begin the search [Alt+E].
4. Highlight the carrier in the results list then select **OK** [Alt+O].
5. In the Elig field, use the drop-down to select Cardholder or other appropriate relationship. This field is used by Pharmaserv for family linking.
6. Use the fields in the **Policy** area to enter the information from the insurance card.
7. Select the **Save** button [Alt+S]. The insurance plan you added will be listed in the **Coverages** area.
8. Select **Save** [Alt+S] to close the Patient Coverage Summary.

**START A NEW RX:**

1. Back on the Patient Maintenance window, select the **New Rx** button [Alt+W].

**VERIFY COVERAGE TYPE:**

1. The Cvg field defaults to the patient’s insurance plan. (Use the drop-down to select cash or a different plan if necessary.)

**SEARCH FOR THE WRITTEN PRODUCT:**

1. In the Item field, type the product name, NDC number, or supplier order number then press **Tab**.
2. Highlight the item in the results list then select **OK** [Enter].
Practice Steps: Fill a Third-Party Prescription (Paid Claim)

**SUBSTITUTE THE GENERIC PRODUCT:**

If generics are available, a list will automatically display.

1. Continue with the product you selected previously or, highlight a generic in the results list then select OK [Enter].

**COMPLETE THE RX DETAILS:**

(Use the Tab key to move from field to field.)

1. In the DAW drop-down box, update the DAW code if necessary.

2. In the Prescriber field, type a few letters of the last name then press Tab to search.

3. Highlight the prescriber in the results list then select OK [Enter].

4. Type the quantity written in the QtyW field. If the dispense quantity is different than the written quantity, change the QtyD field.

5. Type the number of refills authorized.

6. Complete the SIG.
   a. Use the Instr drop-down box to make a selection for the SIG pre-instruction (i.e. T for “Take 1 tablet”).
   b. In the following field, enter any additional codes separated by a semi-colon (i.e. PO;BID).

The SIG displays as it will print on the label.

7. Verify the information in the Days Supply, Rx Origin, Written Date, and Dispensed Date fields.

**VERIFY AND SAVE THE RX:**

1. Verify that all the Rx details have been entered correctly.

2. Verify or enter your initials for sign-off.

3. Select the Save button [Alt+S].

The Label and Bill window opens.
Practice Steps: Fill a Third-Party Prescription (Paid Claim)

**LABEL AND BILL:**

1. Verify that Cvg is set to **Bill Now** to the appropriate third party plan.

2. Select **OK [Enter]** to process the Rx and print the label.

   **Note:** A label only prints if the prescription is Cash or if a claim has been paid successfully. A label will not print if the claim has been rejected.

---

Notes or questions:
Claim Adjudication Module (CAM CK)

The CAM Response window is opened by clicking on the **CAM CK Traffic Light**:

Check the status of Third Party insurance claims [Ctrl+T]

The CAM Response window:
A closer look at the CAM Response fields:

**Claim Status:**
- CP = Captured
- AP = Accepted
- RJ = Rejected
- RD = Rejected Duplicate
- DC = Data Communication Error

**Carrier:**
Carrier code associated with the claim.

**Rx #:**
The Rx or counseling reference number.

**Date:**
Date claim was completed or response received from carrier.

**DUR:**
Y or N indicates if conflict info was received.

**Claim Type:**
- CLAIM = Claim submission
- REVERSAL = Claim reversal
- DUR = DUR Claim submission
- MTM = MTM service claim
- MTM REV = MTM service claim reversal

**Sequence:**
Sequence number for the coverage associated with the claim.

**Item:**
Description of item dispensed.

**Profit:**
Difference between the authorized amount (minus tax) and the true cost. Negative values display in red; positive values display in black.

**Some Important Points:**

The **Item** description is blank for MTM service claims.

The **Profit** field is blank for all OI coverage types and for Rejected (RJ), Rejected Duplicate (RD), and Data Communication Error (DC) primary coverage types. It is also blank if no authorized amount is received.
Refills

You will learn how to:

- Refill a prescription using the Rx number
- Refill a prescription from the patient’s history
- Refill multiple prescriptions in a batch

Some Important Points:

You can select multiple items (Rx’s) from a list by holding down the Ctrl key and clicking on each line for the Rx to be selected.

To select a group of Rx’s from the history window, hold down the Shift key after selecting the first Rx and then select the last Rx in the group.

Batched refills are processed from the Batch Refill Queue.

From the Batch Refill Queue you can process prescriptions by:
- Selecting one Rx at a time.
- Choosing several Rx’s. They will automatically open, one after the other.
- Using the Select All option to process all items in the queue, one after the other.
Practice Steps: Refill a Prescription (by Rx Number)

A customer has called in a number for a refill.

*Locate your student’s last name to determine the Rx number to use.

<table>
<thead>
<tr>
<th>Name</th>
<th>Phone #</th>
<th>State</th>
<th>Zip</th>
<th>Medicate POP</th>
<th>Rx #</th>
</tr>
</thead>
<tbody>
<tr>
<td>Harris</td>
<td>720101</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Robinson</td>
<td>720110</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Anderson</td>
<td>720120</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Williams</td>
<td>720130</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lee</td>
<td>720140</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Zestril = Lisinopril**  **Bactroban = Mupirocin**

**ENTER THE REFILL NUMBER:**

1. From the menu bar select Patient [Ctrl+R].
2. In the Rx # field, type the Rx number.
3. Select the Refill button [Alt+F].

**VERIFY AND SAVE:**

1. Verify the Rx details shown.
2. Verify or enter your initials for sign-off.
3. Select the Save button [Alt+S].

The Label and Bill window opens.

**LABEL AND BILL:**

1. Verify that Cvg is set to CAM and BILL NOW.
2. Select OK [Enter] to process the Rx and print the label.
Practice Steps: Refill a Prescription (with No Rx Number)

A customer has requested a refill but he does not have the number.

**Search for the Patient:**
1. From the menu bar select Patient [Ctrl+R].
2. Type part of the patient’s name or the date of birth.
3. Select the Retrieve button [Enter].
4. Highlight the patient name in the results list.

**Select Refill from Patient History:**
1. Select History [Alt+H].
2. Highlight the prescription to refill.
3. Select the Refill button [Alt+F].

**Verify and Save:**
1. Verify the Rx details shown.
2. Verify or enter your initials for sign-off.
3. Select the Save button [Alt+S].
   The Label and Bill window opens.

**Label and Bill:**
1. Verify that Cvg is set to CASH and BILL NOW.
2. Select OK [Enter] to process the Rx and print the label.
Select multiple prescriptions for refill from the patient’s profile. Process the prescriptions in a batch.

**Search for the Patient:**

1. From the menu bar select Patient [Ctrl+R].
2. Type part of the patient’s name or the date of birth.
3. Select the Retrieve button [Enter].
4. Highlight the patient name in the results list.

**Select Refills for the Batch:**

1. Select History [Alt+H].
2. Hold down the Ctrl key and click on each Rx to be refilled.
3. After all the prescriptions to be filled are highlighted, select the Batch button [Alt+B].
4. At the prompt, ‘Add selected prescriptions to the Batch Refill’, select Yes [Enter].

**Process Refills Using the Batch Refill Queue:**

1. From the Rx menu, select Batch Refill > Queue Maintenance [Alt+X then B then Q].
2. If you want to process all the prescriptions in the batch, one after the other, choose the Select All button [Alt+E] to select all the Rx’s.
3. To start the batch refill process, select the Process Refill button [Alt+P]
Practice Steps: Refill Multiple Prescriptions (Batch Refill Queue)

**VERIFY AND SAVE (FIRST RX):**

1. Verify the Rx details shown.
2. Verify or enter your initials for sign-off.
3. Select the Save button [Alt+S].
   The Label and Bill window opens.

**LABEL AND BILL:**

1. Verify that Cvg is set to CAM and BILL NOW.
2. Select OK [Enter] to process the Rx.
   The next Rx in the batch automatically opens.

**VERIFY AND SAVE (NEXT RX):**

1. Verify the Rx details shown.
2. Verify or enter your initials for sign-off.
3. Select the Save button [Alt+S].
4. Complete processing the Rx as usual. Process each Rx until the batch is complete.

Notes or questions:

__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________
**Claims Adjudication Module - Rejections (CAM CK)**

The CAM Response window is opened by clicking on the **CAM CK** Traffic Light:

![CAM Response Window](image)

**Claim Status:**
- **CP** = Captured
- **AP** = Accepted
- **RI** = Rejected
- **RD** = Rejected Duplicate
- **DC** = Data Communication Error

**Carrier:**
Carrier code associated with the claim.

**Rx #:**
The Rx or counseling reference number.

**Date:**
Date claim was completed or response received from carrier.

**DUR:**
Y or N indicates if conflict info was received.

**Claim Type:**
- **CLAIM** = Claim submission
- **REVERSAL** = Claim reversal
- **DUR** = DUR Claim submission
- **MTM** = MTM service claim
- **MTM REV** = MTM service claim reversal

**Sequence:**
Sequence number for the coverage associated with the claim.

**Item:**
Description of item dispensed.

**Profit:**
Difference between the authorized amount (minus tax) and the true cost. Negative values display in red; positive values display in black.
Correct a Days’ Supply Rejection:

1. Select the Rx Dtls button [Alt+X].
2. Correct the value in the QTYD field and verify that the Days field is correct.
3. Select Save and re-bill the claim.

Correct a Patient or Prescriber Error:

For rejections such as missing/invalid patient date of birth or missing/invalid prescriber DEA or NPI:

1. Select the Rx Smry button [Alt+Y].
2. Place your cursor in either the Prescriber or Patient field then select the Maintenance button.
3. Make the necessary change.
4. Select Save to rebill claim.

Place a Claim on Hold:

1. Select the Rx Smry button [Alt+Y].
2. Select Delete to open the Delete Options window.
3. Select the Place On Hold button [Alt+H].

The prescription is now placed on hold to be filled at a later date.

Delete a Claim:

1. Select the Rx Smry button [Alt+Y].
2. Select Delete to open the Delete Options window.
3. Select the Delete button [Alt+D].

A record of the prescription will be retained but it cannot be refilled.
Claims Adjudication Module: Rejection

You may also use **CAM CK** to change a prescription to cash or to resubmit a claim.

**CHANGE TO CASH:**

If the product is non-formulary or not covered by the insurance, you can select the **Cash** button \([Alt+C]\).

This will take you back to the data entry step and automatically change the coverage to CASH.

**RESUBMIT:**

If the third party network is unavailable you can use the **Resubmit** button \([Alt+E]\) to resend the claim.
**Claims Adjudication Module - Rejection**

**ADD AN OVERRIDE CODE OR PRIOR AUTHORIZATION NUMBER:**

1. Select the **Rx Dtls** button [Alt+X] to open the Rx Details window.

2. Select the **Claim Info** button [Alt+C].
   *Note*: When this window is open all horizontal toolbar buttons, vertical toolbar buttons, and menu commands are disabled.

3. Enter the appropriate information as described on the next page.
4. Select the **Save** button.

---

The Rx Details Window:
**Coverage**
Using the drop-down, select the insurance carrier you want to apply the override codes to, if split billed.

**Prior Authorization**
Use this area to enter prior authorization info including prior authorization code, number, effective date, expiration date, intermediary authorization code, and intermediary authorization number.

**Miscellaneous Fields**
Use this area to enter additional info about the dispense.

**Carrier Remarks**
Use this area to enter miscellaneous free text comments to the carrier.

**Other Insurance**
Use this area to enter other insurance code, patient benefit status, denial date for previously submitted claim, and Other Insurance (OI) payment date.

**Other Payer**
Use this area to enter other payer qualifier ID type, payment amount ID, Payer identification number, and amount paid.

**Fees**
Use this area to enter fee information about the dispense.

**Reject Code Overrides**
Use this area to override the reject reasons sent by the carrier for the previous coverage.
Claims Adjudication Module: DUR

**TO RESPOND TO A DUR MESSAGE:**

1. Select the claim with the DUR message for which you need to respond.

2. Select the **Send DUR** button [Alt+U] on the vertical toolbar.

3. In the Counseling Details window, update the **Reason for Service** (e.g., DUR Conflict Code), **Prof Service** (e.g., DUR Intervention), **Result of Service** (e.g., DUR Outcome), and **Level of Effort** fields, as applicable.

   **Note:** The **Conflict Code** returned by the carrier automatically displays in the **Reason Code** field. You can override this code if necessary.

4. Select the **Save** button.

   The Bill Options window opens with the **Medium** field set to **CAM** and the **Option** field set to **Bill Now**.

5. Select **OK** to transmit the DUR response to the carrier.
Coordination of Benefits (Split-Billing)

You will learn how to:

- Indicate Coordination of Benefits (COB) billing for a prescription
- Change the plan priority (sequence) for billing

Some Important Points:

There are several prerequisites that must be in place before COB billing can take place:

- The Third Party plan must accept COB billing.
- In the Carrier Coverage area of the patient record, each plan involved must be set to allow COB billing.

You may submit a COB claim for up to 9 third party carriers.

Most of the steps for split-billing using a coupon are the same as split-billing using two third party insurances.

When using a secondary insurance that applies to every prescription, use a sequence number of 2. When the secondary is a coupon, leave the Sequence field blank.

Patient Coverage Summary

The primary insurance has a sequence of “1”. The Seq field for a coupon will be blank.
Practice Steps:  Process a COB Claim (with a Coupon)

1. From the menu bar select **Patient** [Ctrl+R].

2. Type part of the patient’s name or the date of birth.

3. Select the **Retrieve** button [Enter].

4. Highlight the patient name in the results list.

5. Select the **Pat Maint** button [Alt+M].
Practice Steps: Process a COB Claim (with a Coupon)

**VERIFY/ADD COVERAGE:**

1. Place your cursor in the **Carrier Cvg** area of the window.
2. Select **MAINT** from the side toolbar.
3. Select **Add** [Alt+A] to add the new policy.
4. Enter all necessary information for the third party (Elig, Relation, ID#, PCN, Person# and group if available).
5. If this is a drug-specific card, remove the number in the **SEQ #** field.
6. Select the **Save** button [Alt+S]. The insurance plan you added will be listed in the **Coverages** area.
7. Select **Save** [Alt+S] to close the Patient Coverage Summary.

**START NEW RX:**

1. Select the **New Rx** button [Alt+W].

**ADD OTHER INSURANCE (OI) COVERAGE:**

1. Select the **Cvg** drop-down arrow.
2. In the 2 field (the second coverage field), select the drop-down arrow to view the plans.
3. Select the insurance to use for secondary billing.
4. Close the coverage window.
**Practice Steps: Process a COB Claim (with a Coupon)**

**VERIFY AND SAVE:**

In the Coverage area, the Primary plan will be listed on the left and the Other Insurance listed on the right.

1. Verify the Rx details shown.

2. Verify or enter your initials for sign-off.

3. Select the **Save** button [Alt+S].

The Label and Bill window opens.

**LABEL AND BILL:**

1. Verify that Cvg for the primary plan is set to **Bill Now** and the secondary is set to **Batch for Later**.

2. Select **OK** [Enter] to send to CAM (Claim Adjudication Module).

**REVIEW Rx PRICING AFTER ADJUDICATION:**

From the CAM window.

1. Select tab **2 Pricing** [Alt + 2].

2. Review the amounts in the **Rx Pricing Totals** area.

3. Click on the secondary claim to highlight it.

4. Select the **Rx Dtls** button [Alt + X] in the side toolbar.
Practice Steps: Process a COB Claim (with a Coupon)

**ADD AN OI CODE FOR THE SECONDARY PLAN:**

1. Select the **Rx Dtls** button [Alt + X] from the side toolbar.
2. In the **Coverage** drop-down box of the Claim Info window, select the secondary plan.
3. In the **OI Code** drop-down box, select the appropriate value.
   - 02 = OI Exists – Payment Collected
   - 04 = OI Exists – Payment Not Collected
   - 08 = Claim is Billing for a Copayment Only
4. If the claim was paid, enter the paid date in the **Paid** field. If the claim was denied, enter the denied date in the **Denied** field.
5. In the **Other Payer** section, select a value in the **ID Qual** field then complete the **ID** field.
Practice Steps: Process a COB Claim (with a Coupon)

**COMPLETE LABEL AND BILL AS “NO BILLING”:**

1. Verify that the Billing Option for both plans is set to No Billing.
2. Select OK [Enter].

**OPEN CAM AND RESUBMIT THE CLAIM:**

1. Click on the CAM CK Traffic Light at the top of the window [Ctrl + T] to open the Claim Adjudication Module.
2. In the list of CAM Responses, highlight the secondary claim.
3. Verify that the Billing Option is set to Bill Now and the Cvg Seq is 2.

**CONFIRM CLAIM APPROVAL:**

1. Verify that for each claim, the 1 Transmission tab shows Status of AP and an Authorization Number.
Next Steps

- An onsite trainer will be present during Go-Live Week to help your staff learn to use Pharmaserv.

  They will help your pharmacy get a smooth start. Typically, the trainer will arrive a day or two before your Go-Live to make sure all hardware is in place, and to test labels and printing.

- You will be assigned a Customer Transition Specialist (CTS) for 30 days to help you address any concerns. The CTS may be reached at 1-866-950-8743.

- The **McKesson Training Portal** - http://learning.mckesson.com is available for scheduling of future training classes and for completing or reviewing self-paced CBT (Computer Based Training) classes. If you do not have a login, request one using the Request Login link on the login page. If you’ve forgotten your password, use the Forgot Login link on the login page.
Pharmaserv Customer Support — 1.800.424.0444, option 1

Monday through Friday 8:30 a.m. to 10 p.m. and Saturday 8:30 a.m. to 5 p.m. Eastern
Pager Coverage—Saturday 5 p.m. to 9 p.m. and Sunday 9 a.m. to 9 p.m. Eastern
Visit the MPS&A Customer Support web site at www.betterpharmacytech.com

Pharmaserv Daily Procedures (Opening/Closing)

Opening Procedures

Log on to your computer

Server
  If necessary, turn your monitor on or press Shift to activate the monitor display.
  If necessary, press Ctrl Alt Del and type your user name and password. The Pharmaserv login window displays by default.
Client
  If necessary, turn your monitor on or press Shift to activate the monitor display.
  If necessary, press Ctrl Alt Del and type your user name and password.

Check e-mail on the server
1. If necessary, minimize Pharmaserv or close the Pharmaserv login window.
2. Double-click the Microsoft Outlook icon on the desktop.
3. Open the Inbox folder.
4. Click the Send/Receive button on the Microsoft Outlook menu bar.
5. Confirm the system backup and McKesson Data Backup were successful and verify that updates were received (Digicall and scheduled task messaging information).

Receive Quantity Acknowledgments, Invoices, and Maintenance from McKesson
1. Quantity acknowledgments, invoice acknowledgments, and price update maintenance are received from McKesson through an automated process that runs every two hours. To receive this information manually click Supply Management | Communications | Receive Acks from the Pharmaserv menu bar.
2. To verify your orders are finalized, click Supply Management | Ordering.
3. From the Select Purchase Order window, confirm that Finalized displays in the Status column for each order.

Log on to Pharmaserv/Rx Processing

NOTE: Complete the following procedures for the icon you were instructed to use.

Client – Pharmaserv Remote Desktop Connection icon (Recommended)
1. Turn on your monitor and log on to your system.
2. Double-click the Remote Desktop Connection icon on the desktop.
3. Select your server name from the Computer field and click Connect.
4. Enter your Login ID and Password.

Client – Remote Desktop Connection icon
1. Turn on your monitor and log on to your system.
2. Double-click the Remote Desktop Connection icon on the desktop.
3. Select your server name from the Computer field and click Connect.
4. Enter your User name and Password and click OK.
5. Enter your Login ID and Password.

Check for Refills (using Refill TeleManager™)
1. From the Rx Processing main window, click Rx | Batch Refill | Queue Maintenance.
2. Click Select All.
3. Click Process Refill.
4. Listen to voice mail messages, if applicable, from the client equipped to perform this function.

Continued on next page
Pharmaserv Daily Procedures (Opening/Closing)

Continued from page 1)

Process OTC Maintenance (POS Customers)
1. From the Pharmaserv main window, click Maintenance | Product Catalog Maintenance.
2. From the Point-of-Sale Product Catalog Maintenance window, click Store End | Import | EconoLink.
3. Process the appropriate files or process the itmupdt.dat file.
4. Click Store End | Process Changes. Review and apply the changes.

Maintain quantity on hand amounts (POS Customers)
1. Double-click the Point-of-Sale Applications folder on the desktop.
2. Double-click the Point-of-Sale BackOffice icon.
3. Click TBO List from the Main menu.
4. Click OK to the message “xx items updated from Econolink.”
5. Click No to subsequent messages and cancel/close out of Point-of-Sale BackOffice.

Closing Procedures

Log off from the System
Client
1. From the Pharmaserv main window, click File | Exit and then click Yes.
2. From the Rx Processing main window, click File | Exit and then click Yes.
3. From the desktop, click Start | Log Off. Do not use the close button (x).
4. Turn your monitor off, if applicable.

NOTE: Be sure to close out of all applications and leave your server at the desktop.
## Rx Processing Horizontal Toolbar Buttons

Each horizontal toolbar button in the Rx Processing application enables you to access a system module:

<table>
<thead>
<tr>
<th>Button</th>
<th>Shortcut</th>
<th>Windows</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business</td>
<td>Ctrl + B</td>
<td>Opens the Select Business window and enables you to access each Business Maintenance window.</td>
</tr>
<tr>
<td>Carrier</td>
<td>Ctrl + A</td>
<td>Opens the Select Carrier window and enables you to enter new carrier information or retrieve existing carrier information.</td>
</tr>
<tr>
<td>Item</td>
<td>Ctrl + I</td>
<td>Opens the Select Item window and enables you to access Item Maintenance and other item-related functions via the vertical toolbar.</td>
</tr>
<tr>
<td>Patient</td>
<td>Ctrl + R</td>
<td>Opens the Select Patient/Rx window and enables you to access patient and prescription information.</td>
</tr>
<tr>
<td>Prescriber</td>
<td>Ctrl + E</td>
<td>Opens the Select Prescriber window and enables you to access prescriber information.</td>
</tr>
<tr>
<td>Price CK</td>
<td>Ctrl + K</td>
<td>Opens the Price Check window and enables you to provide price quotes for a specific item and patient.</td>
</tr>
<tr>
<td>CAM CK</td>
<td>Ctrl + T</td>
<td>Opens the CAM Status window and displays the results (approved, rejected, etc.) of claims that have been sent to a third party carrier for adjudication.</td>
</tr>
<tr>
<td>Outreach</td>
<td>Ctrl + Y</td>
<td>Accesses the Physician Outreach Program website based on the NABP (NCPDP) number of the pharmacy established in Business Maintenance. This option enables you to only access the website and not transfer information automatically between the systems. You must be enrolled in the Physician Outreach Program to use this feature.</td>
</tr>
<tr>
<td>CPS Task</td>
<td>Ctrl + Q</td>
<td>Opens the CPS Task Queue enabling you to view CPS program messages. The CPS Task Queue is a centralized view of all unresolved messages that have been received for your patients. You must be licensed to use this feature.</td>
</tr>
</tbody>
</table>

Continued on next page
Ctrl + G

Opens the CPS Messaging App displaying messages as they are triggered, enabling you to take action on enrollments and alerts as they are received. You must be licensed to use this feature.

N / A

Enables you to access the Pharmaserv application including Report Manager and optional modules. See the Pharmaserv Horizontal Toolbar section for descriptions of the toolbar options that display when you access the Pharmaserv application.

Maintenance Vertical Toolbar Button

Use the Maint vertical toolbar button as a short cut to add/modify information. The toolbar button is available when the field which has focus has an associated Maintenance window. Following is a sample of some of the fields for which this function is available.

When Focus is on:

Any field in the Profile group box of New Rx, Refill, Rx Maint Details, or Rx Maint Summary window

Cvg field of New Rx, Refill, or Rx Maint Details window

Item or W/F field of New Rx, Refill, or Rx Maint Details window

Instructions (Instr) and Signa Instructions (no label) fields of New Rx, Refill, or Rx Maint Details window

Prescriber field of New Rx, Refill, or Rx Maint Details window

Physical Qty field of New Rx, Refill, or Completion window

Carrier Coverage (Cvg) area of Patient Maintenance window

Allergies area of Patient Maintenance window

Medical Conditions area of Patient Maintenance window

Address, City, State, Zip, or Zip+4 fields of various Business, Carrier, Patient, Prescriber, and Rx windows

Area Code, Phone #, or Extension fields of various Business, Carrier, Patient, Prescriber, and Rx windows

Click MAINT to open:

Patient Maintenance window enabling you to add/edit profile information for the patient displayed

Patient Coverage Details window for that coverage enabling you to add/edit third party coverage.

Item Maintenance window for the item enabling you to modify information for drug, AWP Acq, etc.

Signa Code Maintenance to add, maintain, or delete information for the Signa Code selected.

Prescriber Maintenance window for the prescriber enabling you to modify the information.

Inventory window to modify inventory information for the item selected.

Patient Coverage Summary window enabling you to add insurance data.

Patient Allergies window enabling you to add, delete, or maintain allergies for the selected patient.

Patient Medical Conditions window enabling you to add, delete, or maintain medical conditions for the selected patient.

Address Maintenance window to add, maintain, or delete multiple addresses for the selected business, carrier, patient, or prescriber.

Phone Maintenance window to add, maintain, or delete multiple telephone numbers for the selected business, carrier, patient, or prescriber.
Pharmaserv Horizontal Toolbar

Additional toolbar buttons display based on which modules are licensed.

<table>
<thead>
<tr>
<th>Button</th>
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</tr>
</thead>
<tbody>
<tr>
<td>Customer Maintenance</td>
<td>Ctrl + R</td>
<td>opens the Select Customer window and enables you to retrieve customers and to initiate the process of adding a customer.</td>
</tr>
<tr>
<td>Facility Maintenance</td>
<td>Ctrl + F</td>
<td>opens the Select Facility window and enables you to retrieve facilities and to add a Long-term Care facility (when licensed for LTC) or a general facility.</td>
</tr>
<tr>
<td>Item Maintenance</td>
<td>Ctrl + I</td>
<td>opens the Select Item window and enables you to retrieve items for viewing and editing when licensed for LTC.</td>
</tr>
<tr>
<td>Generate Statements</td>
<td>Ctrl + G</td>
<td>opens the Generate Statements window enabling you to start the statement generation process when licensed for Accounts Receivable.</td>
</tr>
<tr>
<td>Supply Management</td>
<td>N/A</td>
<td>opens the Select Purchase Order window and enables you to create, edit, send, copy, combine, finalize, and delete POs when licensed for Supply Management.</td>
</tr>
<tr>
<td>Rx Processing</td>
<td>N/A</td>
<td>opens the Rx Processing application.</td>
</tr>
<tr>
<td>Imaging</td>
<td>Ctrl + M</td>
<td>opens the Imaging module and enables you to scan hard copy prescriptions and other documents to associate to Rxs and patients when licensed for Pharmacy Navigator.</td>
</tr>
<tr>
<td>Filling</td>
<td>Ctrl + N</td>
<td>opens the Filling module and enables you to dispense Rxs and to use automation units when licensed for Pharmacy Navigator. You can also fill Rxs manually, and complete partial and deferred Rxs.</td>
</tr>
</tbody>
</table>

Continued on next page

(Continued from page 5)
<table>
<thead>
<tr>
<th>Button</th>
<th>Shortcut</th>
<th>Windows</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Ctrl + E</td>
<td><strong>Inventory &amp; Replenishment</strong> opens the Inventory &amp; Replenishment module and enables you to maintain and replenish inventory when licensed for Pharmacy Navigator.</td>
</tr>
<tr>
<td></td>
<td>Ctrl + H</td>
<td><strong>Checking</strong> opens the Checking module and enables you to verify a patient’s Rx for accuracy prior to distributing the Rx to the patient when licensed for Pharmacy Navigator.</td>
</tr>
<tr>
<td></td>
<td>Ctrl + W</td>
<td><strong>Virtual Will Call</strong> opens the Virtual Will Call module and enables you to store and maintain Rxs in Will Call areas.</td>
</tr>
<tr>
<td></td>
<td>Ctrl + K</td>
<td><strong>Rx Tracker</strong> opens the <em>Rx Tracker</em> window and enables you to locate and track an Rx throughout every step in the workflow process.</td>
</tr>
<tr>
<td></td>
<td>Ctrl + D</td>
<td><strong>Dashboard</strong> opens the <em>Dashboard</em> window and enables you to view prescription processing information and pharmacy performance.</td>
</tr>
<tr>
<td></td>
<td>N/A</td>
<td><strong>CPS Task</strong> opens the CPS Task Queue enabling you to view CPS program messages. The CPS Task Queue is a centralized view of all unresolved messages that have been received for your patients. You must be licensed to use this feature.</td>
</tr>
<tr>
<td></td>
<td>N/A</td>
<td><strong>Message</strong> opens the CPS Messaging App displaying messages as they are triggered, enabling you to take action on enrollments and alerts as they are received. You must be licensed to use this feature.</td>
</tr>
</tbody>
</table>

**Single SignOn** enables you to log in or authenticate one time to access multiple applications. The authentication process eliminates the need to log in each time you switch applications during a session.
Using Online Help In Pharmaserv

Context sensitive Help is available for fields in the Rx Processing and Pharmaserv applications:

Field Level Help
1. To view online Help for a field or button in the Rx Processing application, press the Shift and F1 keys when the field or button has focus. In the Pharmaserv application, press the F1 key.

   To view Help for fields within a table, press the Shift and F1 keys when the table has focus. The window displays the first field in the table.

2. To close the Help window, click the Close (x) button. You can also click Exit from the Rx Processing application.

Tab Level Help (Available only in the Pharmaserv application)
1. To view online Help for a tab, press the Shift and F1 keys when the tab name has focus or press the F1 key.

   The window displays the topic that describes the tab. Links to other related information, such as field definitions and procedures, are built into the Help.

2. To close the Help window, click the Close (x) button.

Window Level Help (Available only in the Pharmaserv application)
1. To view online Help for a window, press the Shift and F1 key when the window has focus or press the F1 key.

   The window displays the topic that describes the window. Links to other related information, such as field definitions and procedures, are built into the Help.

2. To close the Help window, click the Close (x) button.

Using Other Navigation Tools in Online Help

For access to additional tools, click Help from the menu bar and then click Help Topics. You have the following tab options:

Contents tab: Provides access to a predetermined list of helpful "books" covering various options within the Rx Processing and Pharmaserv applications.

Index tab: Provides access to type a word/phrase to find a procedure or definition.

Search: Provides access to type a word/phrase to locate a topic related to your word/phrase.

Favorites: Available only with optional modules in the Pharmaserv application and enables you to bookmark frequently visited Help topics.
Enter a New Patient

1. Click the **Patient** button to open the *Select Patient/Rx* window.

2. Type the patient’s last name in the Last field.

3. Click the **Retrieve** button to verify the patient is not currently in your database.

4. Click the **New Pat** button to open the *Patient Maintenance* window. The last name displays as you typed it in the previous window.

5. Complete the patient profile information.

6. Complete the Allergies, Medical Conditions, and Carrier Copays as needed by clicking in that view area and then clicking the **Maint** button.

7. Click **Save**.

---

Enter Patient Coverage Information

1. Click the **Patient** toolbar button to open the *Select Patient/Rx* window.

2. Type the selection criteria (last name, etc.) and click **Retrieve**.

3. Select the patient from the list of patients.

4. Click **Pat Maint**.

5. Click in the Carrier Cvg view area in the lower right corner of the *Patient Summary* window.

6. Click the **Maint** vertical toolbar button.

7. Type information in the required fields and any optional fields in the Patient area on the *Patient Coverage Summary* window.

8. To add a new coverage, click **Add**. The Select Carrier window opens.

9. Select a carrier and click **Retrieve**.

10. Enter information on the *Patient Coverage Details* window.

11. If this is Worker’s Compensation coverage, click the **WC** button. Type information in the fields in the *Patient Coverage WC* window and click **Save**.

12. If required to associate patient employer information with the coverage, click **Empl**. The employer must first be entered in Employer Maintenance (Business Maintenance).

13. Select or enter information in the required fields (teal background) and any optional fields on the *Patient Coverage Employer* window and click **Save** to save the patient employer information.

14. Click **Save** to return to the *Patient Coverage Summary* window.

15. Click **Save** to return to the *Patient Maintenance* window.

16. To modify an existing coverage, from the *Patient Coverage Summary* window, select a coverage row to modify and then click **Details**.

---

Enter Notes

The **Notes** toolbar button enables you to access the Notes text box and enter or retrieve information for a patient, prescription, item, prescriber, or carrier.

1. Click the **Notes** toolbar button to open the *Patient Notes* window. This button displays in **red** if patient notes exist.

2. Select a Note Type from the drop-down list.

3. Click in the Note Text field and type the text.

4. To add text to existing notes, click the cursor where you want to add text and click **Save**.

5. To add more notes, click **New Note** and type the text.

6. Click **Save**.
Enter Multiple Addresses or Telephone Numbers for Patients, Prescribers, Businesses, and Carriers

1. Retrieve the patient, prescriber, carrier, or business.

2. To enter multiple addresses or phone numbers:
   a. For multiple addresses, click in any address field (Address, City, State, Zip, or Zip + 4).
   b. For multiple phone numbers, click in any phone number field (Area Code, Phone #, or Ext.).

3. Click the Maint vertical toolbar button.

4. Click Add.

5. Select the Type of address or phone number. For fax numbers, be certain to select FAX as the Type.

6. Type the additional address or phone number. Repeat as needed.

7. Select the Primary check box if necessary to indicate the main address or phone number.

8. Click Save to save the addresses or phone numbers.

---

Entering and Maintaining Businesses

1. Click the Business toolbar button to open the Select Business window.

2. Select the type of business to add or update (pharmacy, employer, facility, transfer pharmacy, eMAR partner, or supplier) from the Type field.

   **NOTE:** You can only enter one business as the Pharmacy type.

3. Type other search criteria and click Retrieve. A list of matching businesses displays.

4. Select a business from the list and click OK, or click New to add a new business of the selected type.

5. Complete or modify the appropriate information in the Business Maintenance window. Fields that are required display with a teal background.

6. Click Save to store the information.
Add and Maintain Items

1. Click the Item toolbar button to open the Select Item window.

2. Type the name of an item in the Name field or enter the NDC.

3. Click Retrieve. A list of items matching the entry displays in the Items window.

4. Select the item from the Items window. If the item is not on the list, click New to add the item.

5. Click OK.

6. Type or select information (like the Preferred Item default) in the Item Maintenance and Item Summary windows. (Type the item name exactly how you want it to print on the Rx label.)

7. If the item is a compound (Profile Type = CMP), click Ingred and type or edit the ingredients or instructions for mixing the compound.

8. Click Save to save the information.

9. Complete any additional functions from the vertical toolbar as needed.

10. Click Save to save the changes.

Adding a New Item Using the Item Import Database

1. Click the Item toolbar button to open the Select Item window.

2. Enter or select search criteria in any of the fields in the Criteria area.

3. Select Items to Import from the Source drop-down list.

4. Click Retrieve. All items matching the search criteria entered display, sorted alphabetically, in the results window of the Select Item window.

5. Highlight the row for which you want to create a new item and click Import. The Create Item window displays.

6. Complete the fields and group boxes in the Create Item window.

7. Click Save to add the item to the Pharmaserv Item database with information from the Item Import database.
**Fill a New Rx**

1. Click the **Patient** toolbar button to open the *Select Patient/Rx* window.

2. Type the patient selection criteria (i.e., last name, telephone number, etc.).

3. Click **Retrieve**. A list of patients displays.

4. Select the patient from the list of patients.

   If the patient does not display, click **New Pat** to add the patient. See Page 6.

5. Click **New Rx**.

6. Type the full or partial name or item number of the item being dispensed and press **Tab**. The *Items* window displays a list of items matching your entry.

7. Select an item from the display. Click **OK**. If System Preferences is enabled, a list of generic substitutes may display. The brand name item displays at the bottom of the list.

8. If applicable, select a generic substitute and then click **OK**. The *New Rx* window displays.

9. Type information in the following fields:
   - **Cvg**
   - **Prescriber**
   - **QtgW**
   - **QtgD**
   - **Rfls Auth**
   - **Instr (Signa Code)**
   - **Dosage Instructions (unlabeled)**

10. Type information into optional fields. You can place the Rx on Hold (Card 12) by selecting HOLD RX from the Status drop-down list.

11. Click **Save**. The *Label and Bill Options* window opens.

12. To accept the defaults, click **OK**. If you do not want to use the defaults, enter the new information and click **OK**.

**Refill an Rx**

1. Click the **Patient** toolbar button to open the *Select Patient/Rx* window.

2. If you know the Rx number, type the number in the Rx# field, and go to Step 3.

   If you don’t know the Rx number:

   a.) Type the patient’s last name.

   b.) Click **Retrieve**.

   c.) Select the patient from the list of patients.

   d.) Click **History**.

   e.) Select the Rx to be refilled.

3. Click **Refill**.

4. If a different item is being dispensed, type the name or item number and press **Tab**. Select the item from the list of displayed items. (If System Preference is enabled, a list of generic substitutes may display.)

5. If applicable, select the generic and click **OK**.

6. Type or update the required fields and any optional fields as needed.

7. Click **Save**. The *Label and Bill Options* window opens.

8. To accept the defaults without making any changes, click **OK**.

   If you do not want to use the defaults, type the new information and click **OK**.
### Put an Rx on Hold

1. Type information in all required fields for the Rx.

2. Click the drop-down arrow in the Status field and select **HOLD RX**.

3. Click **Save**. The *Label and Bill Options* window opens.

4. To accept the defaults without making any changes, click **OK**.

   The prescription number will remain the same when you need to activate the Rx.

   The letter **H** displays next to the Rx number in *Patient Rx History* window. Follow the procedures for refilling an Rx to activate the Rx on hold.

### View Rx Dispensing History

1. Select a patient to view Rx dispensing history.

2. Click **History**.

3. Select the Rx from the list on the *Rx History* window.

4. Click the **Rx Maint** button.

5. View the Dispense Summary.

6. Select the dispense date and click **Details**.

7. View all dispensing information about the Rx including doctor, directions, quantity, etc.

8. If applicable, change any values as needed and click **Save**.

### Take an Rx Off Hold

1. Click the **Patient** toolbar button to open the *Select Patient/Rx* window.

2. If you know the Rx number, type the number in the Rx# field. Go to step 3.

   If you don't know the Rx number:
   a.) Type the patient's last name.
   b.) Click **Retrieve**.
   c.) Select the patient from the list of patients.
   d.) Click **History**.
   e.) Select the Rx to be refilled.

3. Click **Refill**.

4. If a different item is being dispensed, type the item name, item number, and press **Tab**. Select the item from the list displayed. (If the System Preference is enabled, a list of generic substitutes may display.)

5. If applicable, select the item from the displayed list.

6. Change any default values as needed.

7. Click **Save**. The *Label and Bill Options* window opens.

8. To accept the defaults without making any changes, click **OK**.

   If you do not want to use the defaults, type the new information, and then click **OK**.
**Enter Signa Codes**

1. From the menu bar, click **Modify** and then click **Code**. The **Code Maintenance** window opens.

2. Select the **Signa** vertical toolbar button.

3. Type the Signa Code and press the **Tab** key. A window prompts if the code does not exist.

4. Type the instruction text.

5. Type the Dosage Per Day (field accepts decimal values—e.g., 1.5).

6. Select the Dosage/Route check box if the code may be used as the first instruction.

7. To add an alternate language:
   a. Click **Add**.
   b. Select a language from the Language list box.
   c. Type text in the selected language in the Text field. (**NOTE**: To print on labels, you must select a Language default in Patient Maintenance.)

8. Click **Apply** or **OK** to save the new codes.

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**Enter Group Codes**

1. From the menu bar, click **Modify** and then click **Code**. The **Code Maintenance** window opens.

2. Select a code group in the Group field or click a code group button on the vertical toolbar.

3. Click **Add** to add a new code.

4. If the System Assigned check box is blank, enter a code identifier in the Code Value field.

5. Type a description for the code in the Description field.

6. Repeat steps 3-5 for each code you want to add.

7. Click **Save** to save the new codes.

---

**Enter Auxiliary Label Codes**

1. From the menu bar, click **Modify** and then click **Code**. The **Code Maintenance** window opens.

2. Click the **Auxiliary** vertical toolbar button.

3. Type the auxiliary Label Code and press the **Tab** key. A window prompts if the code does not exist.

4. Type the auxiliary label text. (Hold the **Ctrl** key and press **Enter** to start a new line.)

5. Click **Save** to save the codes.

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**Enter City Codes**

1. From the menu bar, click **Modify** and then click **Code**. The **Code Maintenance** window opens.

2. Click the **City** vertical toolbar button.

3. Click **Add**.

4. Type the City Code.

5. Type information in the City, State, and Zip Code fields.

6. Click **Save** to save the codes.
Change “Billed” Rx to “Cash”

**From the CAM Status window:**
1. Select an Rx from a row in the CAM Responses area.
2. Click the Cash button on the vertical toolbar to open the Rx Maint Details window.
3. Click Save.
4. Click OK.

**From the Select Patient/Rx window:**
1. Type the Rx number or lookup the Rx on the Patient History window.
2. Click the Rx Maint button.
3. Select the dispensing to be changed.
4. Click the Details button.
5. Change the Cvg field to Cash.
6. Click Save.
7. Click OK.

---

Delete an Rx

1. Click the Patient button to open the Select Patient/Rx window.
2. Select the patient and click the History button.
3. Select the Rx number to be deleted and click the Rx Maint button.
4. Click Delete. The Delete Options window opens.

**NOTE:** If the claim has already been adjudicated, be sure to reverse the claim prior to completing the deletion.
5. Select the dispense date to delete.
6. Click OK. A Delete Warning window opens and prompts confirmation of the delete.
7. Click OK to delete the Rx.

The letter D displays next to the dispense date in the Dispense Summary area of the Rx Maint Summary window.

**NOTE:** A deleted Rx cannot be restored and the claim is reversed.

Viewing a Claim’s Status

1. Click the CAM CK button on the horizontal toolbar. The CAM Status window opens.
2. In the CAM Responses area, select the claim that you want to review.
3. Click one of the tabs (Transmission, Pricing, DUR, etc.) to view information about the claim.
4. Click a vertical toolbar button to perform a specific function. For example:
   - **Rx Dtls** enables you to make corrections to the Rx and then re-send.
   - **Resubmit** enables you to immediately re-send the claim to the carrier.

**NOTE:** You can leave this window open and use Ctrl + Tab to access this window at any time while in Pharmaserv.
Reversing and Re-sending Claims

1. Retrieve the patient for the Rx which is being reversed and re-sent.

2. Click History. The Patient Rx History window opens.

3. Select the Rx to reverse and re-send.

4. Click Rx Maint. The Rx Maint Summary window opens.

5. Click Details for the dispensing to be reversed and re-sent. The Rx Maint Details window opens.

6. Click Save to display the Label and Bill Options window.

7. Select the appropriate choice in the Billing Option field.

8. Click OK to accept the changes and re-send the claim.

   - Or -

   Click Cancel to close the window without making any changes. You may be prompted to confirm the cancellation.

Reversing MTM Billing Claims

1. Open the Counseling Summary window for the patient.

2. Select the MTM service claim you want to reverse and click Details. The MTM Service window displays.

3. Highlight the claim you want to reverse and click Reverse. The transaction is transmitted to the carrier. When complete and accepted, the Status and Amount Paid fields are blank and the CPT Code, Prior Auth #, Reason, Prof Service, Result, and Service Fee fields are enabled.

4. Edit and resubmit the claim, if applicable. Use the Cam Status window to check the status of your claims and to reverse or resubmit MTM claims.
Print Reports Using Print Manager

The Report Manager module enables you to view, print, and schedule reports for regular print cycles from the Rx Processing application or the Pharmaserv application. You can save reports and export them as Adobe® Acrobat®, Microsoft® Excel, or Microsoft® Word file formats.

1. In the Rx Processing application, click Reports | Report Manager and the Report Manager window displays a list of report categories licensed for McKesson products. In the Pharmaserv application, click Reports | Report Print Manager to open the Report Manager window.

2. Click on a tab (Categorized, Alphabetic, or Recently Used) to display available reports.

3. Double-click the abbreviated product name or click the plus (+) sign to view an expandable tree of report categories, templates, and report names.

4. Click on the report you want to access. (Steps to add/create a report are available in the Online Help.)

5. If necessary, use the options on the Sort and Filter tabs to customize the report. (Online Help is available throughout the application to help you.)

6. Select a Print Option. You can print to printer, view on screen, or save to file. You can also click the Scheduler button to print at a later date or at recurring intervals. (See Scheduling a Report below.)

7. Type or select the number of copies to print.

8. The Report Viewer window enables you to view a report before printing. Select a report and then click View Report button on the Print Options tab.

Scheduling a Report

1. Open the Scheduler window by:
   a.) right-clicking on a report name from the Categorized, Alphabetic, or Recently Used tab in the Report Manager window and click Schedule.

   b.) Click the Scheduler icon if it has focus.

2. In the Schedule Frequency area, select how often you want to run a report. Your options are Once, Daily, Weekly, Monthly, or Yearly.

   NOTE: The date range automatically increments to coincide with the option selected.

3. Type/select dates and times where necessary.

4. Select a Schedule Option:
   - Print to Printer to schedule the report and print to the selected printer.
   - Save to File to save the report and export it when scheduled in an Adobe® Acrobat®, Microsoft® Excel, or Microsoft® Word file format.

5. Type or select the number of copies to print.

6. Click OK to complete the report schedule.

NOTE: To view the Scheduler Status window, click the Scheduler Status toolbar icon in the Report Manager window.
This Page Intentionally Left Blank
<table>
<thead>
<tr>
<th>TABLETS/CAPSULES</th>
<th>LIQUIDS</th>
<th>TIME OF DAY</th>
</tr>
</thead>
<tbody>
<tr>
<td>BCP 1 TAB DAILY FOR 21 DAYS, STOP FOR 7, THEN REPEAT</td>
<td>EL TAKE 1 TEASPOONFUL</td>
<td>Q12 EVERY 12 HOURS</td>
</tr>
<tr>
<td>BCP28 TAKE 1 TABLET DAILY FOR 28 DAYS</td>
<td>L TAKE 1 TEASPOONFUL</td>
<td>1HS AND 1 AT BEDTIME</td>
</tr>
<tr>
<td>C TAKE ONE CAPSULE</td>
<td>L1TB TAKE 1 TABLESPOONFUL</td>
<td>1VHS INSERT 1 APPLICATORFUL AT BEDTIME</td>
</tr>
<tr>
<td>C2 TAKE 2 CAPSULES</td>
<td>L2 TAKE 2 TABLESPOONFUL</td>
<td>2HS AND 2 AT BEDTIME</td>
</tr>
<tr>
<td>D DISSOLVE 1 TABLET</td>
<td>L2TB TAKE 2 TABLESPOONFUL</td>
<td>AM IN THE MORNING</td>
</tr>
<tr>
<td>D2 DISSOLVE 2 TABLETS</td>
<td>TB TAKE 1 TABLESPOONFUL</td>
<td>AM PM MORNING AND EVENING</td>
</tr>
<tr>
<td>DENTAL TAKE 4 CAPSULES BY MOUTH 1 HOUR PRIOR TO APPT</td>
<td>TB2 TAKE 2 TABLESPOONFUL</td>
<td>ATC AROUND THE CLOCK</td>
</tr>
<tr>
<td>F CHEW 1 TABLET</td>
<td>TP TAKE 1 TEASPOONFUL</td>
<td>BID TWICE A DAY</td>
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<tr>
<td>F2 CHEW 2 TABLET</td>
<td>TP2 TAKE 2 TEASPOONFUL</td>
<td>BTID 2 OR 3 TIMES A DAY</td>
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<td>T TAKE ONE TABLET</td>
<td></td>
<td>HR HOUR</td>
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<tr>
<td>T2 TAKE TWO TABLETS</td>
<td></td>
<td>HRS HOURS</td>
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<td>HS AT BEDTIME</td>
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<td></td>
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<td>PM IN THE EVENING</td>
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<td></td>
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<td>Q2 EVERY 2 HOURS</td>
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<td>Q24 EVERY 24 HOURS</td>
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<td>Q3-4 EVERY 3 TO 4 HOURS</td>
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<td>QIDACH 4 TIMES A DAY, BEFORE MEALS AND AT BEDTIME</td>
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<td>QIDPCH 4 TIMES A DAY, AFTER MEALS AT BEDTIME</td>
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<td>QD OD EVERY OTHER DAY</td>
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<td>QPM EACH EVENING</td>
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<td></td>
<td>TID TIMES DAILY</td>
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</tbody>
</table>

**ADMINISTRATION**

| A APPLY | ABD FOR ABDOMINAL PAIN |
| AA TO AFFECTED AREA | ALG FOR ALLERGY |
| AAD APPLY AS DIRECTED | ANG FOR CHEST PAIN |
| AD IN RIGHT EAR | ANX FOR ANXIETY |
| ALL TAKE ALL AS ONE DOSE | ART FOR ARTHRITIS |
| AO APPLY | BM FOR BOWEL MOVEMENT |
| AS IN LEFT EAR | BP FOR BLOOD PRESSURE |
| AU IN EACH EAR | BRE FOR BREATHING |
| B USE | CCL FOR COUGH AND COLD |
| E USE | COG FOR COUGH AND CONGESTION |
| EM USE | COL FOR COLD |
| EN USE | CON FOR CONGESTION |
| G INSTILL | COU FOR COUGH |
| GPO DROPS IN MOUTH | CR FOR CRAMPS |
| H USE | DEC DECUBITIS |
| I INHALE | DEP FOR DEPRESSION |
| IN INCHES | DIA FOR DIARRHEA |
| J INJECT | DIZ FOR DIZZINESS |
| K INSERT | FL FOR FLUID |
| LO TAKE 1 LOZENGE | HE FOR HEART |
| M SPRAY | HEA FOR HEADACHE |
| N TAKE 1 DROP | LBM LOOSE BOWEL MOVEMENT |
| O APPLY ONE PATCH | NAU FOR NAUSEA |
| OD IN RIGHT EYE | PAI FOR PAIN |
| OS IN LEFT EYE | SAC SACRAL |
| OU IN EACH EYE | STO FOR STOMACH |
| P APPLY | |
| PO BY MOUTH | |
| Q APPLY | |
| R RINSE MOUTH | |
| S INSERT | |
| SAS SWISH AND SWALLOW | |
| SH APPLY | |
| SL UNDER TONGUE | |
| UNW UNWRAP BEFORE USING | |
| V INSERT 1 APPLICATORFUL | |
| VAG VAGINALLY | |
| W WASH | |
| X INSERT 1 VAGINALLY | |
| Y DISSOLVE 1 PACKET | |

**SYMPTOMS**

**AS NEEDED**

| PRN AS NEEDED | PRNF AS NEEDED FOR |
| PRNP AS NEEDED FOR PAIN | SPAR SPARINGLY |
| SPAR SPARINGLY | UD AS DIRECTED |

**MISCELLANEOUS**

| * SEE OTHER LABEL | FOL FOLLOW ATTACHED INSTRUCTIONS |
| STAT AT ONCE | TIL UNTIL FINISHED |
| TIL UNTIL FINISHED | WO WITHOUT |
| WO WITHOUT | X# X NUMBER OF DAYS |
| X# X NUMBER OF DAYS | ZZZ EXPAND FREE TEXT BOX |