MCKESSON

Pharmaserv

Getting Started Guide

For use with the
Pharmacy Management System
from McKesson

BUSINESS
CARE
CONNECTIVITY

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Table of Contents

Welcome

McKesson Pharmacy Systems (MPS) welcomes you to the growing number of pharmacists who have selected the Pharmaserv® pharmacy management computer system for their pharmacy business.

In today's retail pharmacy environment, where cost containment is critical and the competition is fierce, MPS is committed to providing the products, services, and third party support to help keep you profitable.

This guide provides you with vital information to help ensure the successful implementation of your Pharmaserv system.

The *Pharmaserv Getting Started Guide* is organized as follows:

Welcome provides an overview of the features in the Rx Processing and the Pharmaserv applications and other services offered by McKesson Pharmacy Systems such as customer support and label supplies.

Introduction to Microsoft Windows describes the key elements of the Microsoft® Windows® desktop and provides some basics for how to "move around" in windows and how to select options.

Starting The Pharmaserv System outlines the server and client relationship and provides step-by-step instructions for accessing your system using the Windows Server 2008 operating system.

Using Rx Processing covers basic operations within the Rx Processing application. (The Pharmaserv application provides access to optional Long-term Care and Accounts Receivable modules.)

Using Online Help explains how to access and use the online Help for up-to-date information while you are using the Rx Processing and Pharmaserv applications.

Customizing Your System provides an overview and checklist of the steps your system administrator must complete to customize your Pharmaserv system.

Establishing Initial Information provides general procedures and checklists for establishing initial information such as pricing schedules, prescribers, and patients.

Appendix A: Base Data identifies the information provided by McKesson Pharmacy Systems when you receive your Pharmaserv system. (**NOTE:** Customers converting from a previous Pharmaserv system or competitor's system may have additional base data as a result of their conversion.)

Appendix B: System Administrator Requirements provides guidelines for managing your Pharmaserv system and its users.

Overview of Features

Designed with the pharmacist in mind, Pharmaserv gives you complete control over every aspect of your pharmacy and helps you keep pace with today's rapidly changing health-care industry. Whether it's filling a new prescription, pricing an Rx, or generating a management report, the Rx Processing application provides you with a wide range of practical and innovative features. The Pharmaserv application provides access to Dashboard, Rx Tracker, and other optional modules.

Following is a brief overview of some of the features in the Rx Processing application:

- **Complete prescription filling process**. You can quickly fill a prescription for a customer and automatically check the prescription information for third party billing requirements, calculate prices, copays, days supply, and provide patient warnings based on patient allergies and medical conditions and drug interactions. The system supports electronic transmission of claims to third party carriers immediately after filling a prescription, with Rx correction and rebilling options. DUR response information can be transmitted. Optional e-Prescribing capabilities enable you to electronically submit refill requests, receive refill authorizations and new Rxs using Surescripts.

- **Pricing flexibility**. Pricing formulas provide complete control over pricing strategies. You have the ability to apply premium add-ons to improve profits. MPS provides daily and weekly price updates. The optional Auto-Rx-Net service automatically updates Pharmaserv price schedules based on competitive prices in your area. Call your MPS representative for details.

- **Total third party control**. When filling prescriptions you can enter and edit all data required by the third party carrier as well as plan and group variables. This enables you to reduce carrier rejects and efficiently handle third party processing.

- **Detailed patient profile information**. The Rx Processing application enables you to enter detailed information about your patients, including insurance information, vital statistics, patient counseling information, allergies, and medical conditions.

- **Extensive reporting capabilities**. The Report Manager module enables you to schedule and print a variety of reports for Pharmaserv and other licensed products.

- **Business maintenance**. Establish and maintain mailing address, contact name, telephone number, and other information about the transfer pharmacies and various companies with which you do business.

- **Extensive prescriber profiles**. You can enter and maintain information on any person prescribing medication, including doctors, physician assistants, and dentists. This information includes licensing and carrier participation.

- **Online Help.** The online Help provides procedures, window explanations, and field definitions. Access the online Help at any time within the Rx Processing or Pharmaserv applications.

To help you use these features, the system incorporates user-friendly tool bar buttons to represent common functions. These buttons are located across the top and below the menu bar of each main window on what is called the **horizontal tool bar**. Selecting these buttons opens a different module.

Within each module, additional buttons are available on the left side of the window, commonly referred to as the **vertical tool bar**. Selecting a vertical tool bar button opens a window related to the current module.

McKesson Pharmacy Systems Software Support Guidelines

McKesson Pharmacy Systems provides software maintenance support which includes enhancements and new releases. Maintenance support is also provided for all peripherals listed in your Purchase Agreement. You can contact the Customer Support Department at:

1.800.424.0444 Option #1 or listen to the menu for other options

Monday through Friday 8:30 a.m. to 11 p.m. Eastern
Saturday 8:30 a.m. to 5 p.m. Eastern
Saturday on-call coverage 5 p.m. to 9 p.m. Eastern
Sunday on-call coverage 9 a.m. to 9 p.m. Eastern

McKesson Pharmacy Systems also offers a Customer Support Web site at www.mckessonpharmacysystems.com

McKesson Data Backup Service is an automated, cloud-based service that continuously runs every 15 minutes to backup critical data elements (for example, your database) necessary to recover Pharmaserv information in the event of catastrophic failure. This data is stored offsite in secure, underground, mirrored data vaults. Data is completely secure and protected at every step of the way using stringent procedures, protocols, and standards.

You will receive a nightly e-mail from MPS (that can be viewed through Microsoft Outlook) displaying basic statistical information regarding the prior day's backup. Contact Pharmaserv Product Support for assistance if you are not receiving these e-mail messages or are having trouble viewing them. A notification is sent to MPS whenever a backup fails. The MPS System Support department will contact you to troubleshoot and resolve the issue. See the section **Using Microsoft Outlook Mail** in this guide for more information.

McKesson Pharmacy Systems assumes no responsibility for re-creating data destroyed by hardware malfunctions, operator misuse, or abuse. If you request additional software support services, such as file re-creation or other services not covered, MPS provides the services within its reasonable capabilities and at the existing service rate.

If you lose or corrupt the data on your system, MPS restores your Pharmaserv system software and data, and the operating system. MPS is not responsible for restoring other software or data on your system.

In addition, when MPS is performing maintenance to your system, no one should attempt to access the system unless specifically instructed to do so by MPS personnel. To begin using the system prior to MPS completing its work and/or without our knowledge can cause loss of data and programs. MPS is not responsible for loss under any of the above conditions.

McKesson Printing Services

MPS offers the convenience of ordering prescription labels and forms directly through McKesson Printing Services, a division of MPS. Since 1981, Printing Services has been committed to providing high quality products and services at competitive prices to pharmacies nationwide.

McKesson Printing Services is a full service printing division. The in-house graphics department is available to assist you in designing labels and forms that incorporate your logo and unique business personality. The labels and forms are printed at our Livonia, Michigan facility.

To view label samples visit the McKesson Pharmacy Systems web site at
www.mckessonpharmacysystems.com

McKesson Printing Services has knowledgeable and courteous customer service representatives who are available to answer questions about their complete product line. Business hours are 8:30 a.m. to 5 p.m. Eastern, Monday through Friday, with voice mail available at any time. To talk to a representative, call 1.800.521.1758 extension 8550.

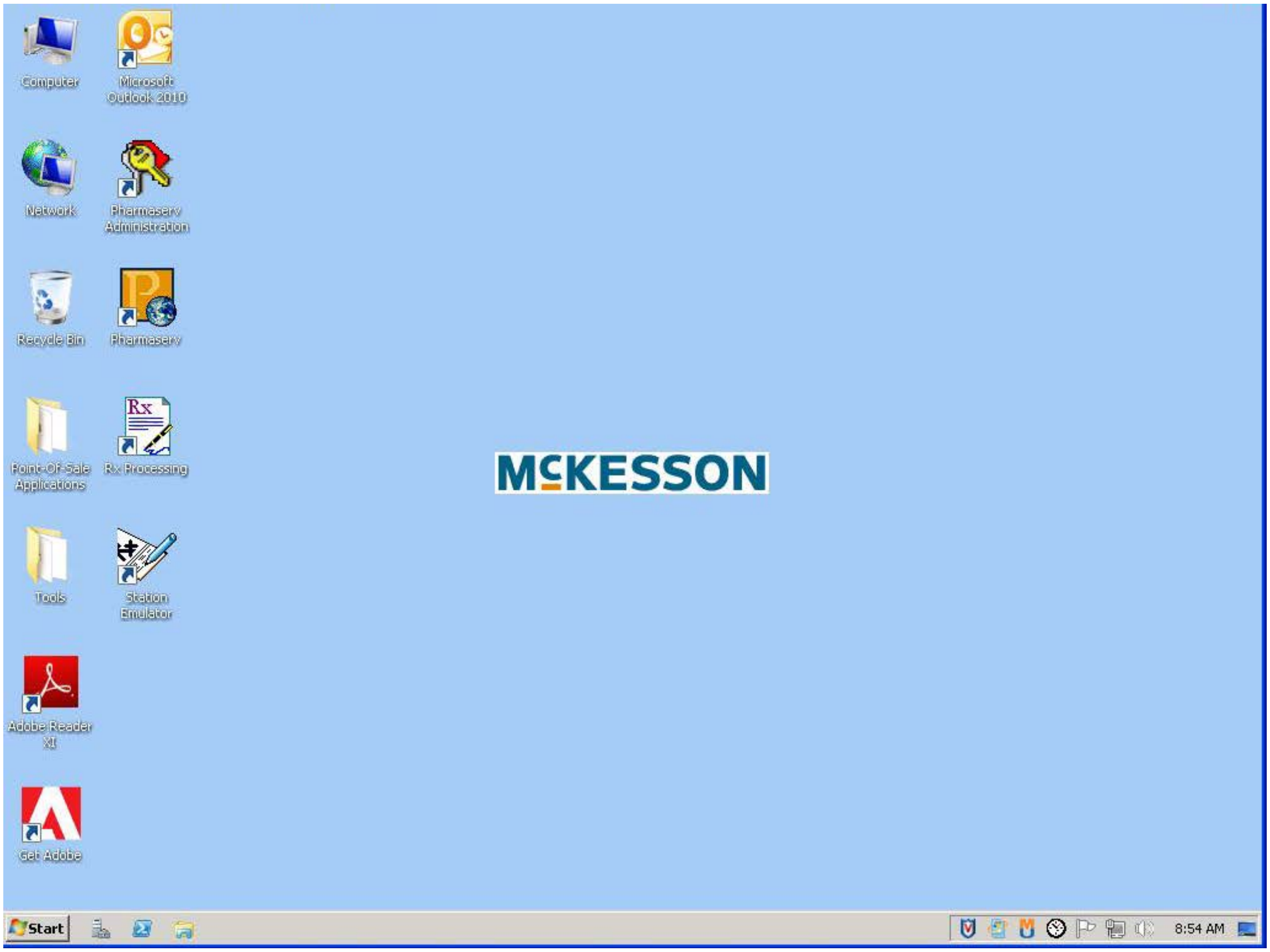
Introduction To Microsoft Windows

Pharmaserv uses the Microsoft Windows Server 2008 operating system on the server and Windows XP or Windows 7 on client systems. This section provides you with an overview of the Windows environment.

This section covers the following information:

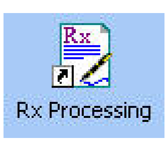
- The Desktop
- Using the Start Menu
- Using the keyboard and mouse
- Manipulating windows including opening, sizing, moving, and closing windows
- Using the menu bar commands
- Selecting options within a window

The Desktop



The Desktop displays all of the shortcut icons you have on your system. The **Start** button at the bottom left enables you to access all of the programs and applications on your system from the Start menu.

Rx Processing Icon



Double-click the **Rx Processing** icon to access the Rx Processing application. This is where you spend most of your time on the system, utilizing business, patient, prescriber, third party information, etc.

Pharmaserv Icon

Double-click the **Pharmaserv** icon to access Dashboard, Rx Tracker, and other optional modules.

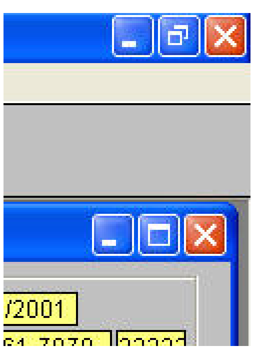
NOTE: Sample windows included in this document may display options available only when optional Long-term Care or Accounts Receivable modules have been activated.

Using the Start Menu

The System Administrator (see Appendix B) accesses the Rx Processing and Pharmaserv applications by double-clicking the appropriate icon from the Desktop on the server. Other users can access the applications from a client system. To access other programs on your system, click the **Start** button. When you click on the **Start** button, the Start menu displays similar to the following:

Click **All Programs** to access a complete list of programs available on your system.

To shrink an application window into a taskbar button at the bottom right of the window, use the minimize button (minus sign) in the upper right corner of the window as shown below.



By minimizing the window, you can clear space on the Desktop without exiting active applications.

When you access the application from a client system, you are using functionality called terminal services. This is covered later in the *Starting The Client Systems* section.

Using the Keyboard and Mouse

Use the keyboard or a mouse to move around the Desktop. General directions about the mouse and keyboard are provided below.

Using the Keyboard

When using the keyboard, selections are made by pressing one key or a combination of keys. When two or more applications are open, you can hold down **Alt** and then press **Tab** to change to other applications without closing the open window.

Using the Mouse

When using the mouse, selections are made based on how you move and click the mouse. Make selections with the mouse using the following techniques. **Click** is used throughout the guide and it always refers to using the left button on the mouse.

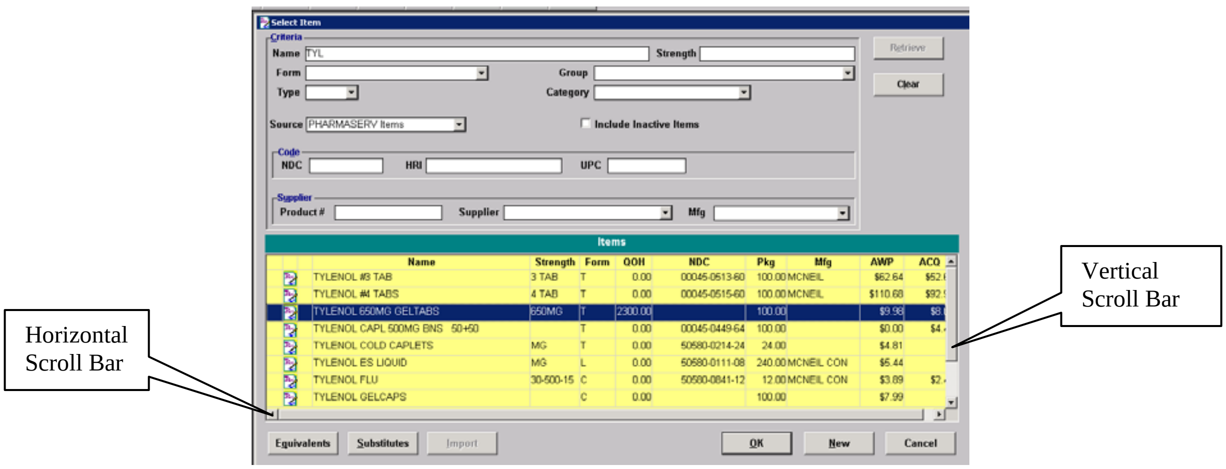
- **Click** means move the mouse pointer to a selection and press and release the left mouse button. This technique selects an object or performs an action.
- **Double-click** means move the mouse pointer to a selection and then press the left mouse button two times in rapid succession. This technique selects and opens the selection. For example: double-click the icon on the Desktop to open the Pharmaserv application.
- **Click and drag** means move the mouse pointer to a selection, click on the selection and then continue to hold down the left mouse button while you move the mouse from one place to another across the window.
- **Right-click** means press and release the right mouse button. This technique displays a menu to enable other commands.

Manipulating Windows in Pharmaserv

Windows can be opened, closed, selected, moved, and sized. To start an application from an icon, double-click on the application icon.

Scrolling Through Windows

When a window cannot display its entire contents, horizontal and/or vertical ***scroll bars*** display. Below is a sample window that is sized too small to display its entire contents:

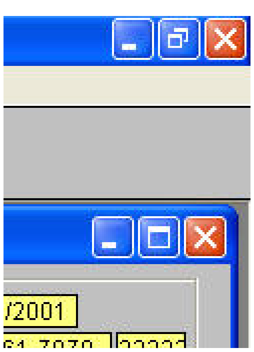


In the above example, the horizontal scroll bar displays indicating that there is more information on the window. The scroll bar indicates the position of the window display relative to the entire view of the window.

To move the window left and right, click on the left or right arrow icon in the horizontal scroll bar. You can also click and drag the scroll box to the left or right until a specific view displays. You can perform the same functions with the vertical scroll bar by moving up or down.

Changing Window Sizes

You can control the size of most windows by using buttons which are located in the upper right corner of the window:



The buttons are known as Minimize (-), Maximize (square), Restore (overlapping squares), and Close (x). This enables you to easily view other applications that are running without exiting the current application. When you move the cursor over a button the name "pops-up."

Minimize Button

 To minimize a window, click on the minimize button (minus sign). The minimize button turns the window into a taskbar button at the bottom of the Desktop. The taskbar button displays the icon and the name of the application. Even though the application appears to be closed, it is still running in the background. To restore a minimized window, click that button representing the application on the task bar.

Maximize Button

 To maximize a window, click on the maximize button (square). The maximize button enlarges the window to its full size. When a window is maximized, all other running applications are in the background.

Restore Button

 When a window is “maximized” the restore button (overlapping squares) replaces the maximize button. Click the restore button to “restore” the window to its original size.

Close Button

 After you have saved your work in a window, close the window by clicking the close button (x). (**NOTE:** When you are closing a Remote Desktop Connection, use the **Log Off** button in the Start menu instead of the close button). You can also click **File** on the menu bar and then click **Exit** to close the window.

Changing the Height and Width of a Window

In addition to minimizing and maximizing windows, you can make windows larger or smaller if the window is NOT maximized. To change the height of a window, use the mouse to click and drag the top or bottom border. The mouse pointer changes to a double sided arrow (↔). To change the width of the window, click and drag the left or right border. To change the height and width at the same time, click and drag one of the corners.

Moving Windows and Icons

You can move windows and icons to different places on your Desktop. To move a window:

1. Click in the title bar of the window and drag the mouse to move the window where you want it. The title bar is part of the top border of the window. As you move the mouse pointer, an outline of the window moves with it. For an icon, the mouse pointer changes to a black and white outline of the icon that moves as you move the mouse.

2. To cancel the move, press **Esc** before releasing the mouse button. When the window or icon is positioned where you want it, release the mouse button.

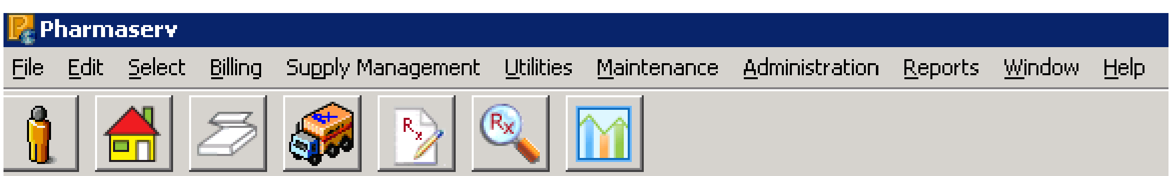
Using the Menu Bar

The menu bar is located below the window's title bar and provides access to several menu options. The following is the menu bar for the Rx Processing application:

To display a menu, move the mouse pointer over the menu name and click with the left mouse button. A list of commands display. Dimmed options are unavailable. Below is a sample Rx menu:

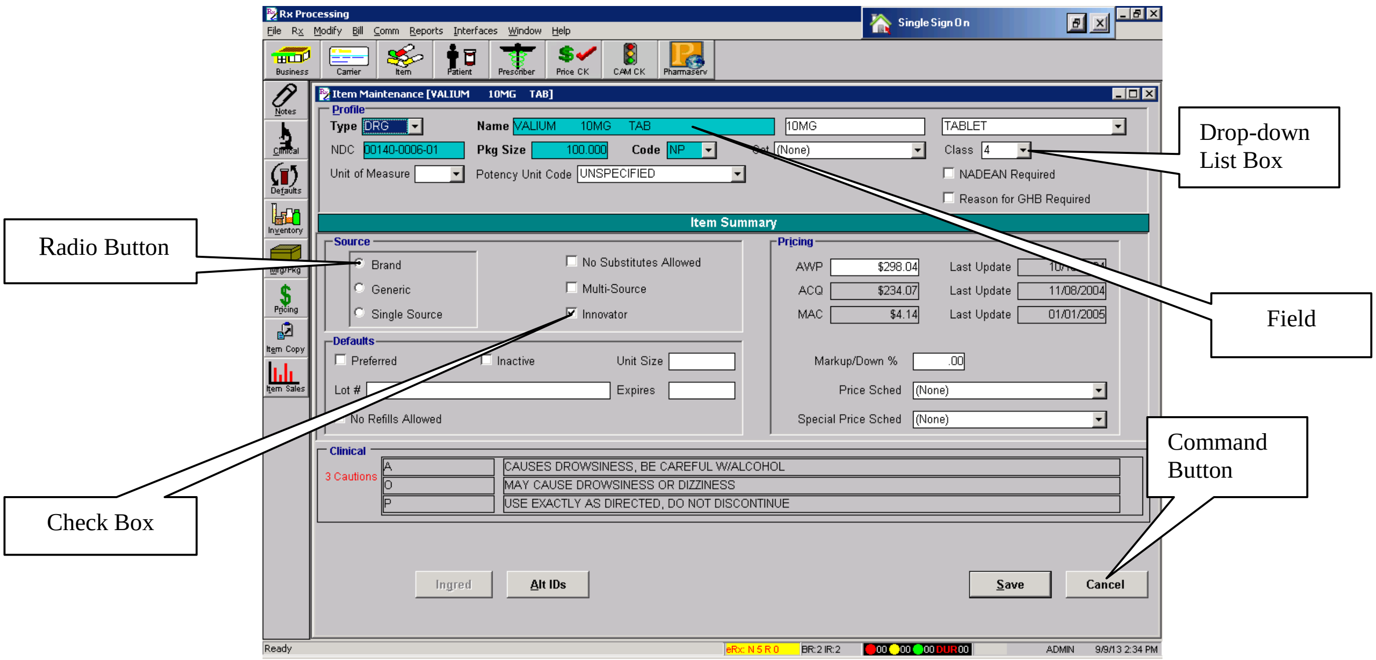
To select a menu option, click on the name.

NOTE: The optional Accounts Receivable or Long-term Care modules can be accessed from the Pharmaserv application menu bar similar to the following:



Selecting Elements on a Window

Following is a description of the various elements—command button, field, radio button, check box, drop-down list box—on a window. A sample window illustrates the various elements:



Command Button

A command button is a button that begins an action. Clicking a command button immediately starts the action. To select a command button, move the mouse pointer to the button and click the left mouse button. You can also press and hold the **Alt** key and click the underlined letter on the button; like **S** on the Save button.

Field

A field is usually a box in which you can enter information. If the field is dimmed you cannot access the field. To select a field to enter information, move the mouse pointer to the box and click the left mouse button. If the box is empty, enter the new text. If the box has existing text, it is automatically highlighted. To replace existing text, type over it.

Check Box

A check box enables you to toggle (select or clear) the option. To select/clear the check box, move the mouse pointer to the square and click the left mouse button.

Radio Button

A radio button is a circle that enables you to select or clear an option. You can select only one radio button in a group. If you select a second option, the first radio button is cleared. To select the radio button, move the mouse pointer to the circle and click the left mouse button.

Drop-down List Box

A drop-down list box is a box with a down arrow, usually on the right. Clicking on the down arrow displays a list from which you may choose.

There are two types of drop-down list boxes. A list box that has a space between the field and the down arrow can be edited. You can enter information in the field or make a selection from the drop-down list.   List boxes that cannot be edited do not have a space before the down arrow.

To select a drop-down list box, click on the arrow to display the drop-down list of options. Then click on the selection.

NOTE: You can use the **Tab** key to move from field to field on any window. When the field or option is highlighted, it is active for entry or changing.

Starting The System

The Pharmaserv system consists of a “server” system and one or more “client” systems.

This section provides the following information:

- Before you start the day
- Understanding the client/server relationship
- Procedures for starting your server system
- Procedures for starting your client systems
- Using Microsoft Outlook Mail
- Using the Rx Processing application

Before You Start The Day

You should perform the following steps each morning before accessing the system:

1. Verify end-of-day reports for accuracy.
2. Check your mail for the following:
   a.) Success of backup
   b.) Messages received from the system
   c.) Messages received from McKesson

See the **Using Microsoft Outlook Mail** section for more information.

Understanding The Client/Server Relationship

The Rx Processing application is installed on the **server** system. The server system holds and manages data that can be accessed by clients. The client systems are connected to the server via a network. The **client** systems allow multiple users to access and enter data that the server processes. Pharmacists and technicians can access the application from anywhere in your pharmacy where a client is available.

You can establish basic System Preferences in Pharmaserv Administration at the server as to how data should be handled and how applications run. These preferences determine what client systems can access and how data is processed.

Starting the Server

The server is the main system. **Before you access the server for the first time using the Windows Server 2008 operating system, YOU MUST CONNECT AND POWER ON THE MODEM (if your system is equipped with a modem)**.

The person in your facility assigned as the System Administrator must start the server before any client system can access the Rx Processing application. THE SERVER MUST BE LEFT ON AT ALL TIMES. When the server is first accessed, the Windows startup sequence begins. The *Begin Logon* window displays. Hold down the **Ctrl – Alt – Del** keys in sequence to access the *Logon Information* window.

You must logon to the computer by entering the Username and Password assigned to the server. Valid users are set up by the System Administrator. Once you have entered the valid login information, click **OK** to continue. The Pharmaserv logon window displays.

Most facilities use multiple clients to access and run the Rx Processing application on a daily basis.

Starting the Client Systems

Once the server is started you can turn on client systems and access Pharmaserv. The Remote Desktop component of Microsoft Windows Server 2008 enables you to use the Remote Desktop Connection on your client system to access the Rx Processing application on your server system.

When you turn on a client system, the Windows startup sequence begins. The *Begin Logon* window displays. Press the **Ctrl – Alt – Del** keys to access the *Logon Information* window. You must logon using the Username and Password assigned to you. Once you have entered the valid login information, click **OK** to continue. The Windows Desktop opens.

NOTE: The Pharmadmin user should be used only for initial setup. The Store Manager user can be used for daily Pharmaserv functions.

1. Click the Pharmaserv Remote Desktop icon (shown below).

2. Enter your server name and click **Connect**. (**NOTE:** If your server name does not display, please contact your MPS Implementation Project Manager.) A similar window opens and prompts to enter your Username and Password.

3. Enter your Username and Password. Click **OK**. You now have remote access to the server and you can use the system just like you were standing at the server. The server name displays at the top of your client screen. The Pharmaserv login window displays. You can either log into the application or cancel to return to the desktop.

4. To exit or close the Pharmaserv Remote Desktop Connection (a terminal services session), be certain to exit from all of the applications. After a short processing delay, the session will close by itself.

IMPORTANT: **Do not use the close button (x) as this will not close the Pharmaserv session. Using this button to exit could result in hardware connection problems the next time you log into any system.**

Using Microsoft Outlook Mail

Use Outlook Mail to review daily messages regarding the status of your system backup and database maintenance. You can also check for Price updates, MAC price updates, GPI updates, Medi-Span® updates, and iDigicall messages from McKesson Pharmacy Systems. If you are a new user, or you are logging into the system for the first time, you must follow the instructions below.

NOTE: It is recommended that you designate a single user as the person to access mail daily. Only the user logged in when messages are received becomes the sole owner of these messages and the messages cannot be viewed by other users.

1. Double-click the Microsoft Outlook icon from the Desktop. Skip to Step 5 unless the *Internet E-mail - store* window displays similar to the following:

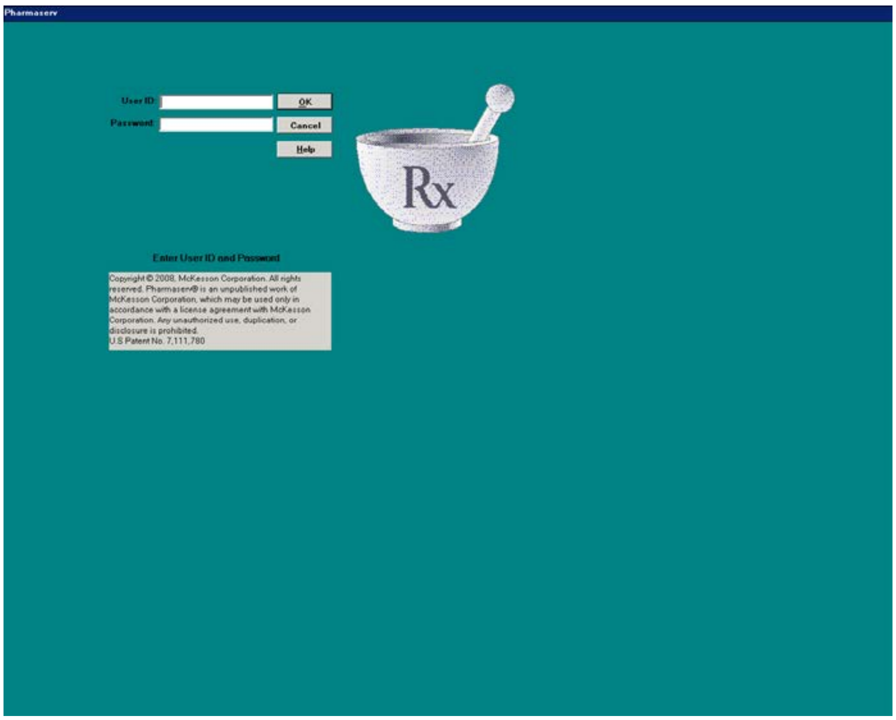
   NOTE: This window may display the first time for each user.

2. Type **store** in the Password field.
3. Select the **Save this password in your password list** check box.
4. Click **OK**.
5. The *Inbox-Microsoft Outlook* window opens and retrieves all pending messages.

Log On To The Pharmaserv Application

Before you log on to the Pharmaserv application, all system preferences and users should be assigned by the System Administrator. See the appropriate section if this information applies to you.
You can run the Pharmaserv application from the server or any client system. Most people access the application from the client system using Terminal Services functionality.

When accessing the server, the Pharmaserv application automatically opens to the Pharmaserv Logon window, similar to the following:



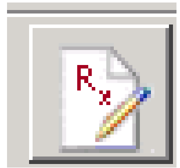
Enter information in the fields listed below:

Field	**Enter**
User ID	User ID assigned to you by the System Administrator.
Password	Password assigned to your User ID for security.

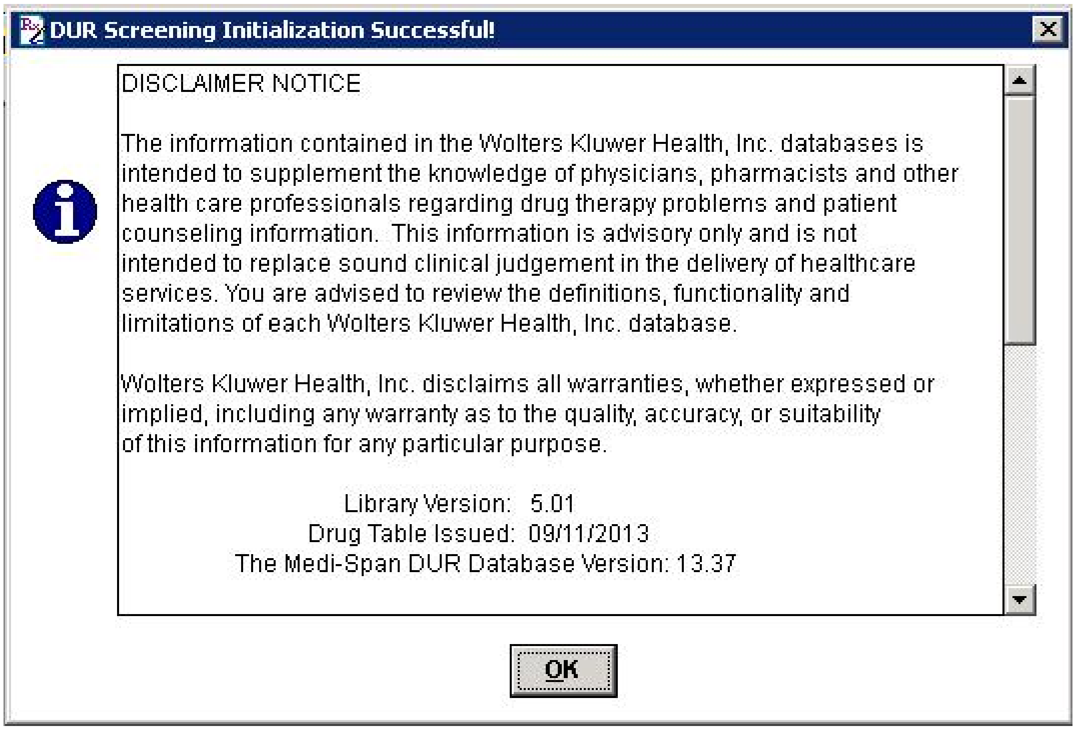
From the *Logon* window, you have the following options:

Click	**To Do This**
OK	Indicate the Logon ID and password are correct and access the Rx Processing application.
Cancel	Exit without accessing the Rx Processing application.
Help	View online Help for instructions.

Once you log on to Pharmaserv, move the mouse pointer to the Rx Processing icon on the toolbar and click the icon:



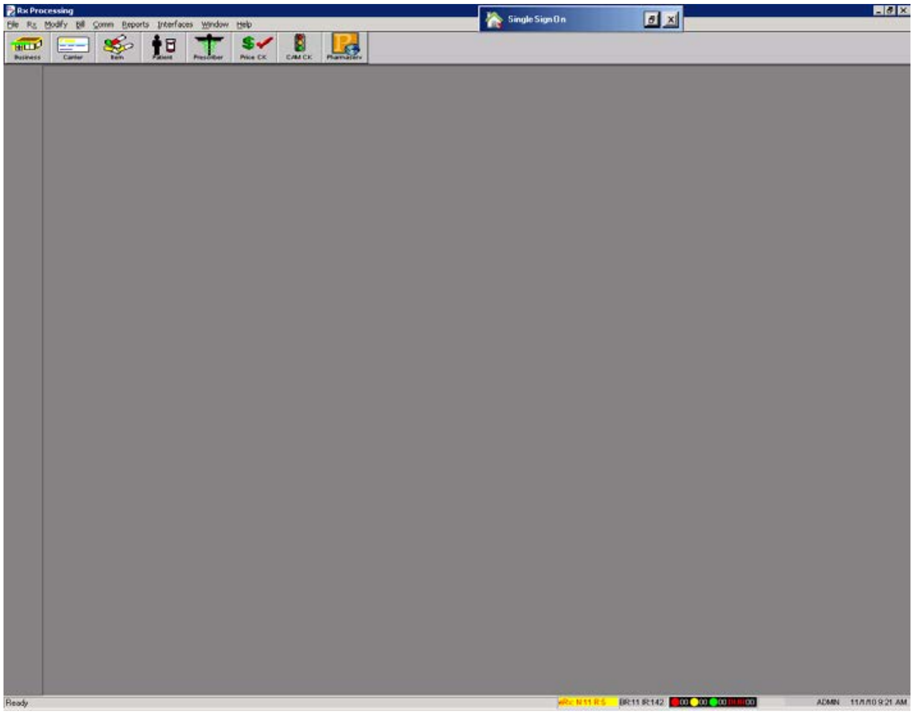
After you log on to the application and the Medi-Span module is successfully initialized, a window displays similar to the following:



Click **OK** to continue.

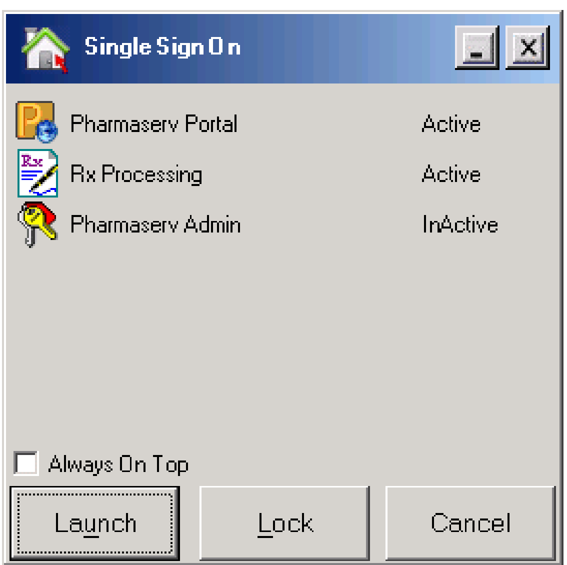
NOTE: If the Medi-Span database has expired, the DUR screening does not occur.

The Rx Processing application opens similar to the following:



You are now ready to use the Rx Processing application!

Single SignOn



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. You can choose to always display the *Single Sign On* window on top of the active window or to send it to the back and not remain on top of the active window.

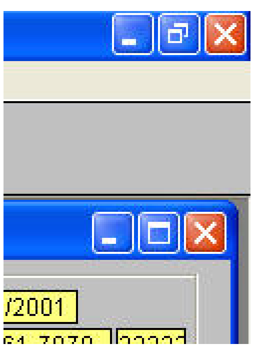
Using The Rx Processing Application

Rx Processing uses some conventions to help you easily move through the application and perform necessary functions. This section defines the following conventions for you:

- Closing a window
- Horizontal toolbar buttons and keyboard shortcuts
- Vertical toolbar buttons and keyboard shortcuts
- Field information such as use of colors and multiple entries
- Information lookup processes
- Main windows and secondary windows
- Exiting Rx Processing

Closing a Window

To close a window in Rx Processing, click on the close box in the upper right corner of the window. Be careful not to select the close box on the main (outer) window because the application closes. The close boxes are shown from a sample window below:



Closes the application

Closes Rx Processing window

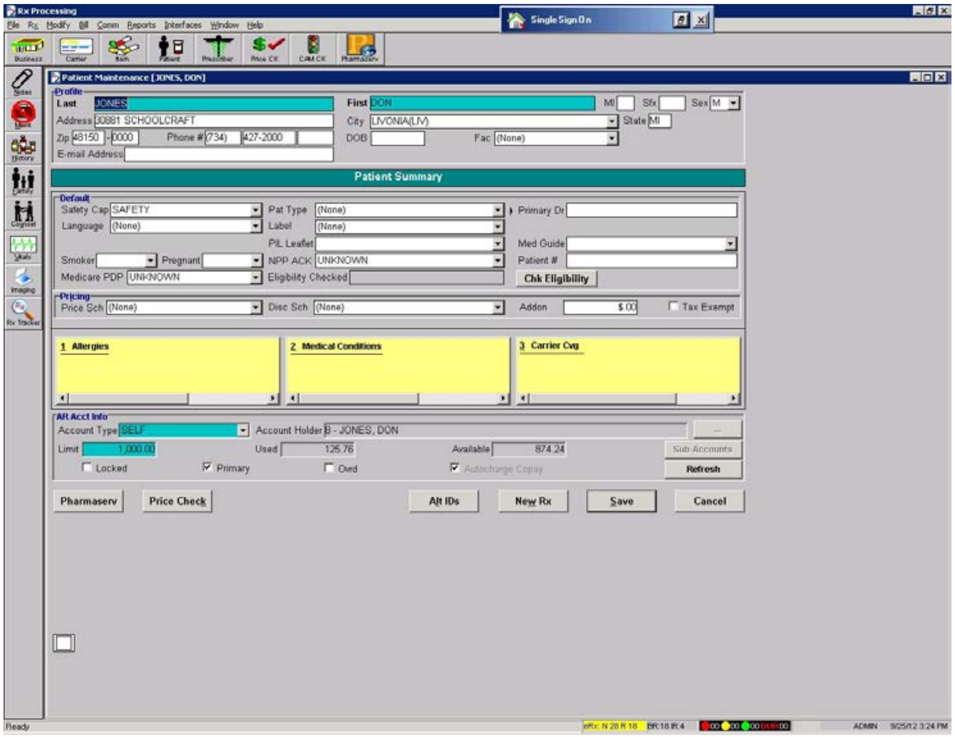
If information has been entered and not saved, you are prompted to save the information before closing the window. Windows without a close box can be closed by selecting one of the following command buttons:

- **OK**
- **Save**
- **Cancel**

When you are finished working in a window, you should always close the window. This ensures that your information has been saved and frees system memory for faster processing. Your system runs much more efficiently if you keep the number of open windows to a minimum.

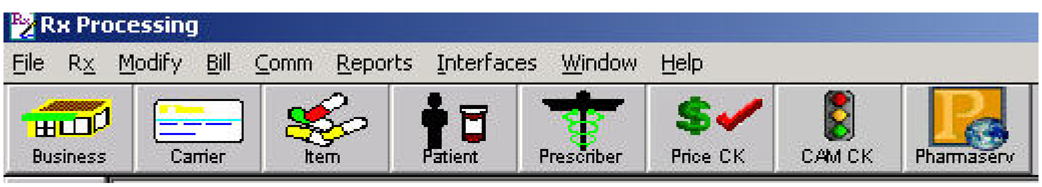
Tool Bar Buttons

Rx Processing uses two tool bars. The horizontal tool bar (left to right at the top of the window) has buttons you select to begin a specific module within the Rx Processing application. The vertical tool bar (up and down the left side) buttons enable you to perform a specific function within the module. A sample window shows the tool bar buttons:



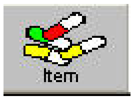
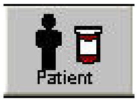
Horizontal Tool Bar Buttons

The horizontal tool bar buttons display in a row at the top of each window in Rx Processing:



Following is an explanation of the horizontal tool bar buttons.

Tool Bar Button	Explanation
Business (Building icon)  **Shortcut: Ctrl + B**	Opens the *Select Business* window enabling you to access the functions in the Business module. Enter information about your pharmacy and the companies (e.g., employers, manufacturers, suppliers, other pharmacies) with which you do business.
Carrier (Coverage Card icon)  **Shortcut: Ctrl + A**	Opens the *Select Carrier* window enabling you to select and enter information about the carriers that you bill.

Tool Bar Button	Explanation
Item (Capsules icon)  **Shortcut: Ctrl + I**	Opens the *Select Item* window enabling you to access the functions available in the Item module. Establish information about the items you dispense, including clinical information, and pricing.
Patient (Person and Vial icon)  **Shortcut: Ctrl + R**	Opens the *Select Patient/Rx* window enabling you to access the functions available in the Patient and Rx modules. Fill and refill Rxs and enter information about your patients and Rxs.
Prescriber (Medical symbol icon)  **Shortcut: Ctrl + E**	Opens the *Select Prescriber* window enabling you to access the functions in the Prescriber module. Establish information about the individuals who prescribe Rxs for your patients.
Price Check (Dollar Sign/ Check Mark icon)  **Shortcut: Ctrl + K**	Opens the *Price Check* window enabling you to check prices on items on your screen before you fill the prescription.
CAM Status (Traffic Light icon)  **Shortcut: Ctrl + T**	Opens the *CAM Status* window enabling you to review the results (approved, rejected, etc.) of claims that have been sent to a third party carrier for adjudication.
Pharmaserv (Letter P and Globe icon)  **Shortcut: Not Available**	Opens the Pharmaserv application and provides access to additional options.

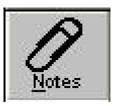
Vertical Tool Bar Buttons

The vertical tool bar buttons vary depending upon your location within the application. Buttons that are not available have the universal No symbol displayed over the button (sample below) to indicate that you cannot select this button.

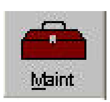
The vertical tool bar buttons relate to the specific window from which the button is selected.

Standard Vertical Tool Bar Buttons

The *Notes* and *Maintenance* vertical tool bar buttons are standard throughout the application. They display on most windows and perform a consistent function. The buttons can be accessed by keyboard shortcuts by pressing and holding the Alt key + the corresponding underlined letter. For example, the Notes button has the N in Notes underlined (below) so you can hold Alt and press N (**Alt + N**) to open a Notes window.



When the *Notes* tool bar button is selected, you can enter notes specific to the window that you are using. The *Maintenance* vertical tool bar button (sample below) is available when the field that has focus has an associated Maintenance window.



The *Maintenance* vertical tool bar button (**Alt + M**) brings up the appropriate Maintenance window. For example, if any of the address fields have focus and this button is selected, the *Address Maintenance* window opens.

Codes can be quickly accessed via the **Maint** tool bar button for those codes that can be modified. For example, if you place the focus on the Instr or Single Line Edit (no label) field for an Rx, and then click **Maint**, the *Signa Code Maintenance* window opens enabling you to enter a new Signa Code. (Ask your trainer about other Code Maintenance shortcuts using **Ctrl + D.**)

Field Information

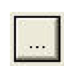
Colors

The Rx Processing application uses specific colors to help you easily identify field types:

Teal background/bold field label	Field is required. You must enter information in this field before the information in the window can be saved.
Gray background	Field is display-only and cannot be edited.
White background	An entry field that is not required (optional).
Pale Yellow	Display-only field which cannot be edited directly, but has maintenance functions available for editing, or can be edited in another window. For example, patient date of birth is pale yellow on the *New Rx* window, but can be edited on the *Patient Maintenance* window.

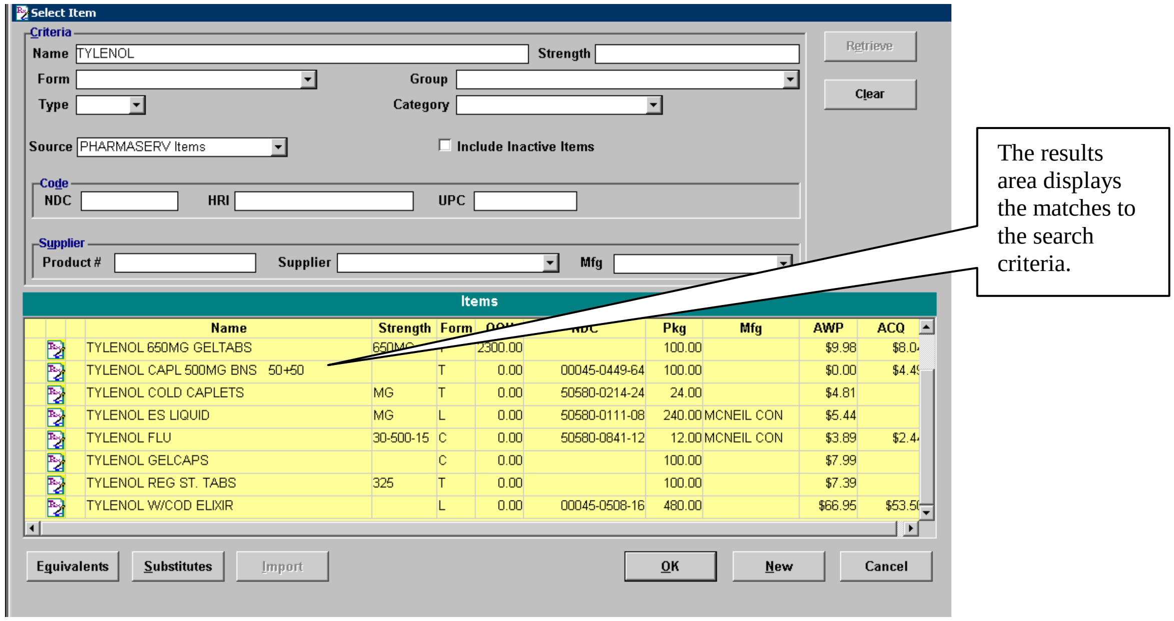
Fields with Multiple Entries

Fields such as address and telephone numbers support multiple entries. Pharmaserv identifies the fields that can have multiple entries with a chevron (**>**). These fields can be maintained from Maintenance windows, available by selecting the **Maintenance** vertical tool bar button when the field has focus.

Some of the optional modules use an ellipsis button  to indicate that more information is needed.

Information Lookup

At times you will need to look up information within the application (e.g., prescriber name, item, carrier, etc.) and in most cases, you can perform a lookup by entering selection criteria on a selection window. When entering the selection criteria, enter as much or as little of the criteria as you may know. Pharmaserv displays all matches that use the criteria in a results area.



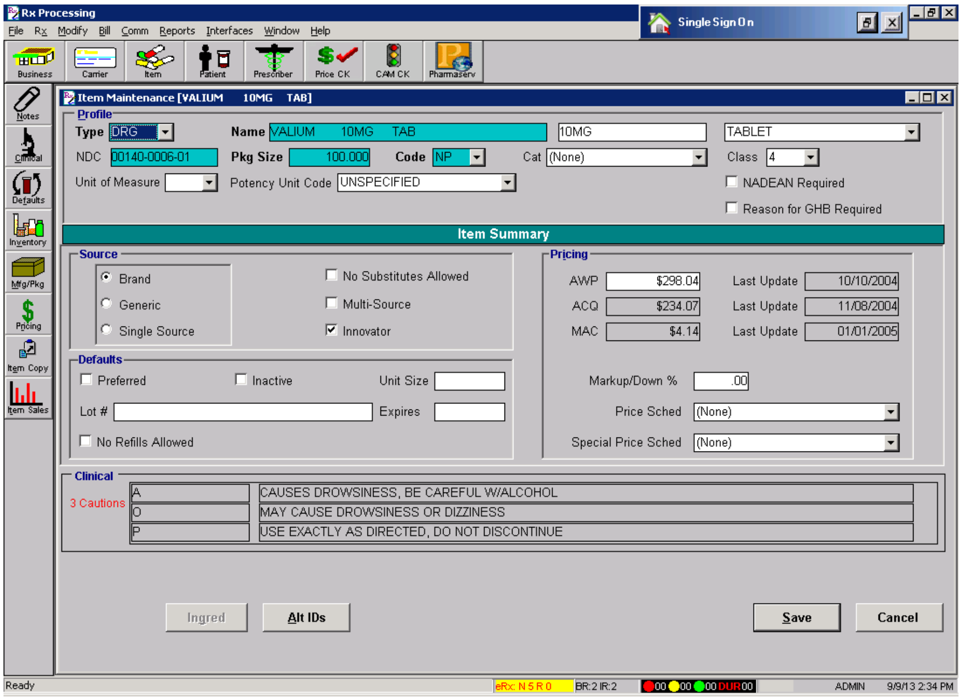
For example, if you are searching for a patient with a very long name or an item with multiple strengths, you could enter just the first few letters of the name and click **Retrieve**. Then make a selection from the results window. The sample above uses TYLENOL as the criteria. The results window shows the various TYLENOLs that match your search.

You can scroll through the list in the results area either by clicking on the up or down arrows in the vertical scroll bar, by dragging the scroll box up and down, or by using the up and down arrows on the keyboard. To move the window left and right, click on the left or right arrow in the horizontal scroll bar.

In other instances, such as prescription processing, a search is performed automatically once you press **Tab** to exit the selection field. This is used in places where only one selection criteria field is available.

Header or Main Window

Each module is composed of one main window and several secondary windows which display and/or accept information. The header window is the main portion of the window displayed on the top of most secondary windows as seen with the *Item Maintenance* window below:



Secondary Window

The secondary window (Item Summary above) displays within a main window and usually displays as a result of a selection made (from a tool bar or command button).

Exiting Rx Processing

When you are done using Rx Processing and want to exit the application, click the close box in the upper right corner of the main window. A confirmation box displays. Click **Yes** to exit.

IMPORTANT: **To exit or close a Remote Desktop Connection (a terminal services session), be certain to use the *Log Off* button.**

Do not use the close button (x).

Using Online Help

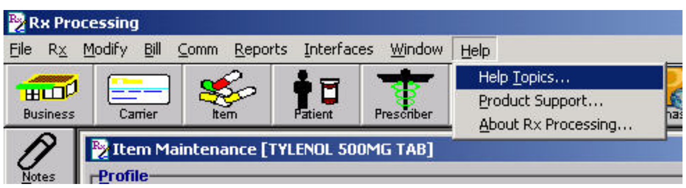
Online Help is a convenient way to lookup information without leaving the application. The Rx Processing and Pharmaserv applications provide context-sensitive Help, which means that you can read Help specific to the field which has focus. Or, you can use the Contents, Index, Search, and Favorites (Pharmaserv only) options to view helpful information.

This section explains the following information:

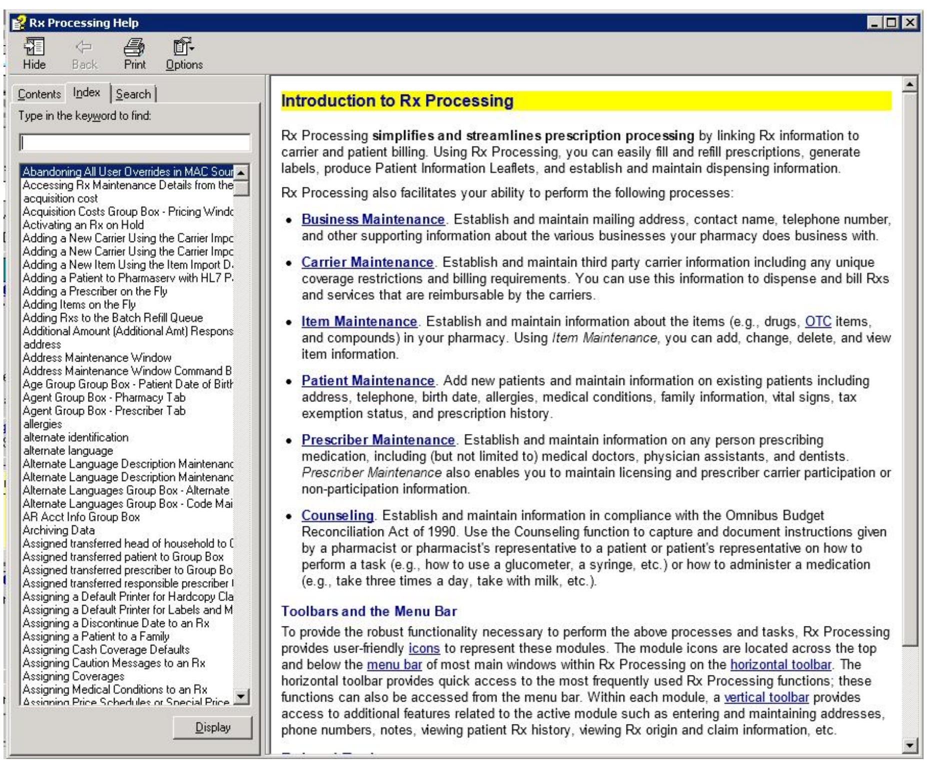
- Accessing Help and using Index, Contents, Search, and Favorites options
- Using Field level Help
- Identifying other Help menu options

Accessing Help

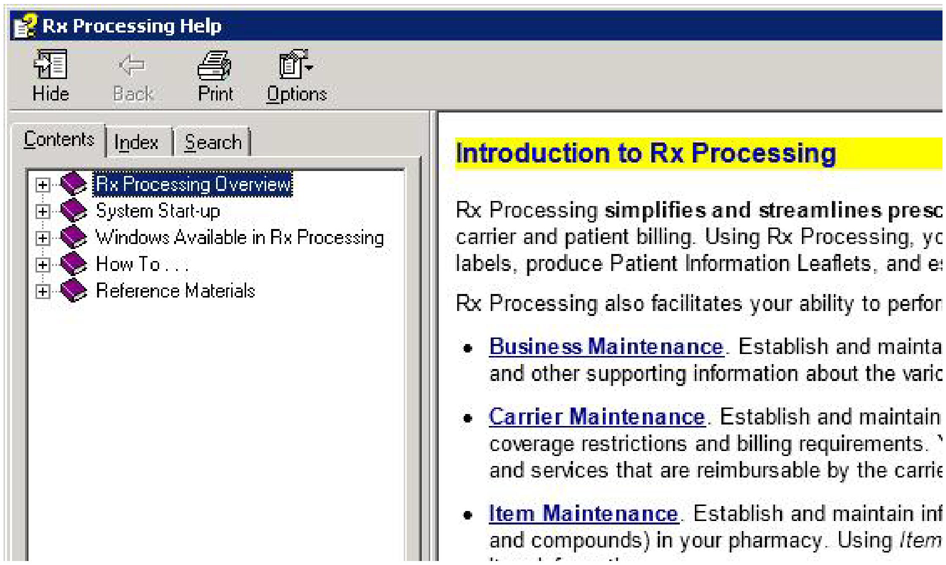
There are several methods to access Help. You can open the Help menu and search for Help by using an Index, Contents, or Search option, and you can use Field level Help from within the application. To display an index of Help topics, click **Help** from the menu bar and then click **Help Topics**. The following windows vary slightly when accessed in the Pharmaserv application.



The *Rx Processing Help* window opens similar to the following:



Online Help offers a quick way to find information just like thumbing through an index. Highlight the topic and click **Display**. A window displays with the information you need. The following topics are available by selecting the **Contents** tab on the *Rx Processing Help* window:



Rx Processing Overview provides general information about the application such as the horizontal and vertical tool bar buttons, keyboard shortcuts, etc.

System Start-up provides a list of the steps that should be followed before you begin using the application.

Windows Available in Rx Processing describes the windows available in each module with field definitions and command button explanations. This is similar to a Reference Manual, describing each window within the software.

How To... provides the procedural information you need to perform functions in Rx Processing. This is similar to a User Manual.

Reference Materials provides a glossary of terms used in the online Help.

You can select a topic from Contents by double-clicking on a book icon in Contents. Under some of Contents entries, another book icon may display. These are usually divided by categories. Continue selecting topics until the information displays.

The online Help in the Pharmaserv application adds a **Favorites** tab. The Contents tab opens to the Introduction to Pharmaserv Help and displays the following options:

Online Help and User Interface Features contains introductory information that helps you understand the online Help in the Pharmaserv application.

Menu Bar describes the commands and functions available from the menu bar.

Accounts Receivable provides an overview to the optional Accounts Receivable module.

Long-term Care provides an overview of the optional Long-term Care module.

Pharmacy Navigator provides an overview to the optional workflow management module.

Point-of-Sale provides information on eight features available in the optional Point-of-Sale module.

Point-of-Sale Register provides information on the main window of Point-of-Sale register window.

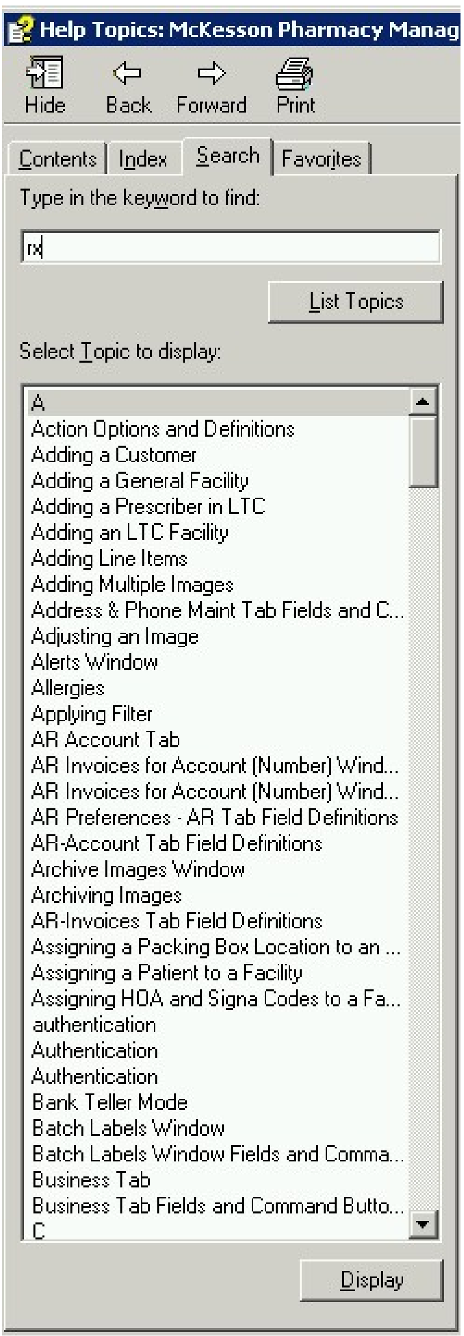
Report Manager provides an overview to the Report Manager module which enables you to view, print, and schedule reports.

Signature Center provides an overview to the optional electronic signature capture device.

Supply Management provides an overview to the Supply Management module.

Glossary provides access to an alphabetical list of terms used in the Pharmaserv application.

When you click the **Search** tab, a window opens similar to the following:



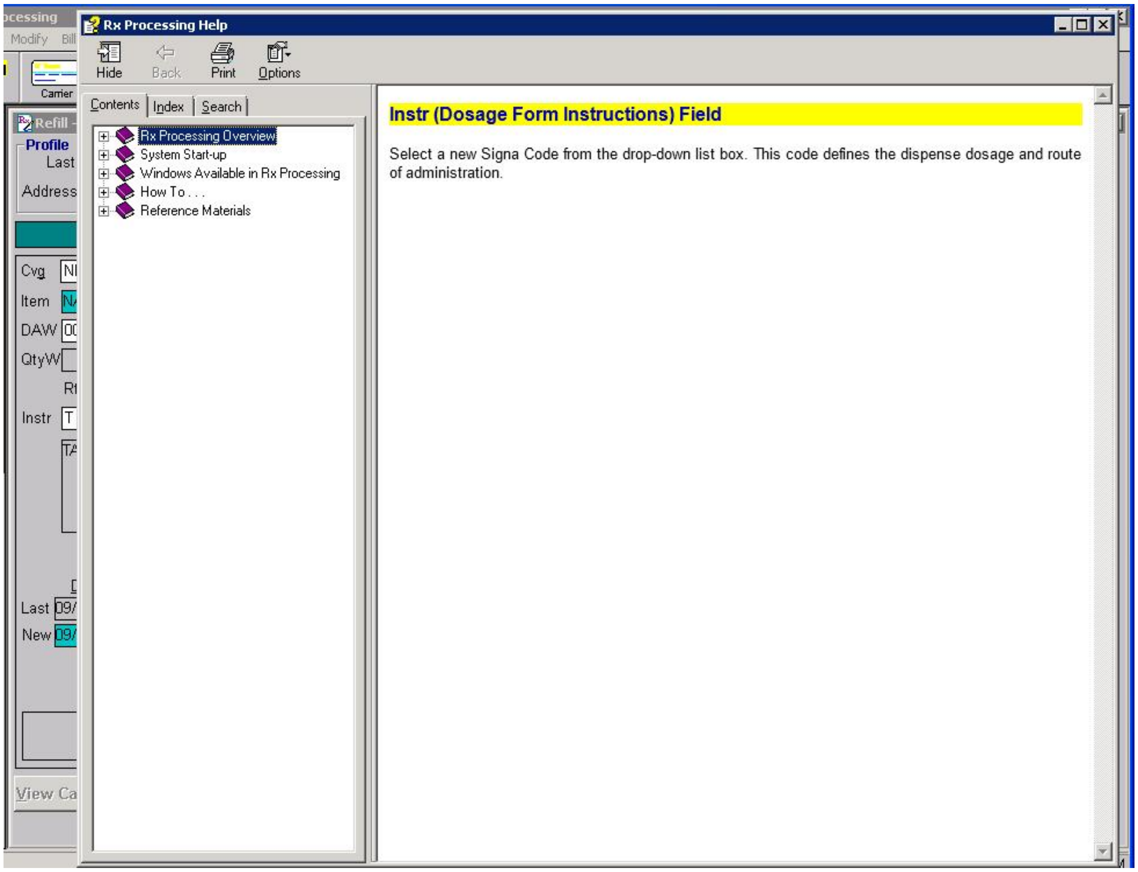
Type what you want to find and matching words display. Click a matching word or click a topic, and click **Display**. The system searches and displays the word highlighted in a matching topic.

Using Field-Level Help

On an Rx Processing window, you can access Help at any time by pressing **Shift** and **F1** to display an explanation of a field or area where the cursor is located.

On a Pharmaserv window, you can access Help at any time by pressing **F1** to display an explanation of a field or area where the cursor is located.

To access Help for a specific field on an Rx Processing window, press **Shift** and **F1** when the field has focus. Field-level Help overlays the window similar to the following:



Other options available on the **Help** menu include:

Rx Processing Application	**Description**
Help Topics	Opens Help on the **Index** tab.
Product Support	For future use.
About Rx Processing	Displays Version and License information.
Pharmaserv Application	**Description**
Help Topics	Opens Help on the **Contents** tab.
About Pharmaserv	Displays Version and License information.
Medispan Imprint/Image Information	Displays Medi-Span database and License information.

Jumps and Pop-up Windows in Help

Help topics can include text or graphics that link to other Help topics or to more information about the current topic. These are called jumps and pop-ups and they are identified by underlined blue text. Jumps take you to a related topic while pop-up windows define the underlined term and display over the topic, so you do not have to exit the current topic to obtain this information.

Selecting a Jump

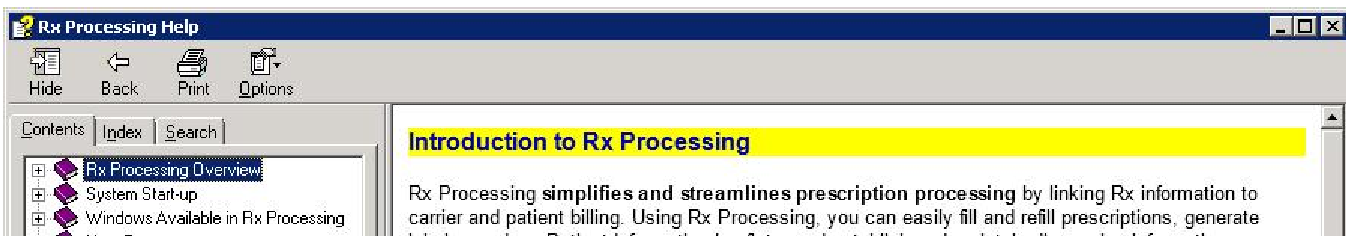
To select a jump in Help, click on the blue text or press **Tab** until the text is selected, then press **Enter**. When the underlined text is selected, a new topic displays.

Selecting a Pop-Up Window

When a pop-up window is selected, a window "pops up" with additional information about the selected text. To close a pop-up window, click in the pop-up window or anywhere else in the Help window.

Help Command Buttons in Rx Processing

Command buttons in the Rx Processing application display at the top of a Help topic window to make finding information easier as shown below:

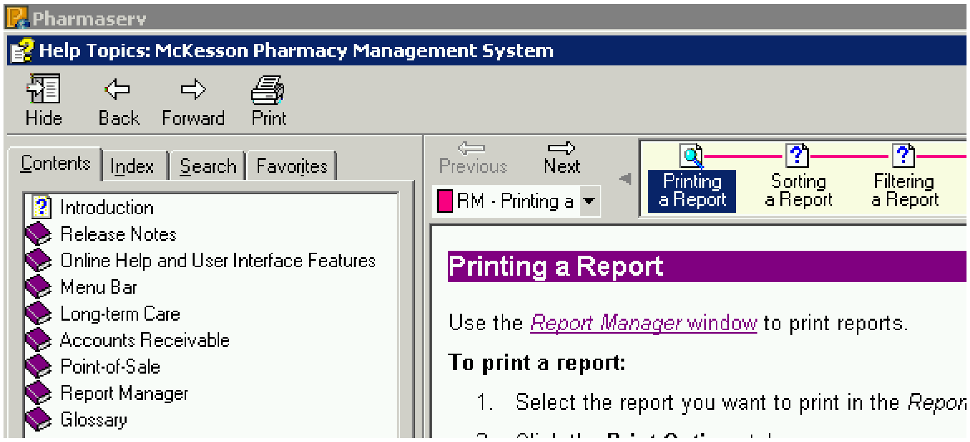


Tab/Option	Description
Contents	Provides access to the table of contents for online Help. The book icons represent chapters.
Index	Displays an index of key words in online Help.
Search	Enables you to locate Help topics by entering a word or phrase.
Hide/Show	Enables you to toggle and either hide or show the left frame.
Back	Enables you to view the topic before the current topic.
Print	Enables you to print the selected topic or the selected heading and all subtopics.
Options	Enables you to access various options in Help including Back, Forward, and Print.

To exit Help, click **Exit** or click the close box.

Help Options in Pharmaserv

A Help topic window in the Pharmaserv application displays similar to the following:



Tab/Option	Description
Contents	Provides access to the table of contents for online Help. The book icons represent chapters.
Index	Displays an index of key words in online Help.
Search	Enables you to locate Help topics by entering a word or phrase.
Favorites	Enables you to save topics you view frequently.
Hide/Show	Enables you to toggle and either hide or show the left frame.
Back	Enables you to view the topic before the current topic.
Forward	Enables you to view the topic after the current topic.
Print	Enables you to print the selected topic or the selected heading and all subtopics.
Previous	Enables you to display the previous topic in a browse sequence.
Next	Enables you to displays the next topic in a browse sequence.

Browse Sequence is the unlabeled area above the right frame and it displays a series of topics in a specific order. You can select a browse sequence from the drop-down list below the Previous and Next options.

To exit Help, click the close box.

Customizing Your System

Most users do not have access to the Pharmaserv Administration module because this is where your system administrator sets system preferences and assigns IDs and passwords for all authorized personnel. Customize your system by completing the following three steps:

1. Set your System Preferences in System Administration.

2. Establish your pharmacy profile in the Rx Processing application.

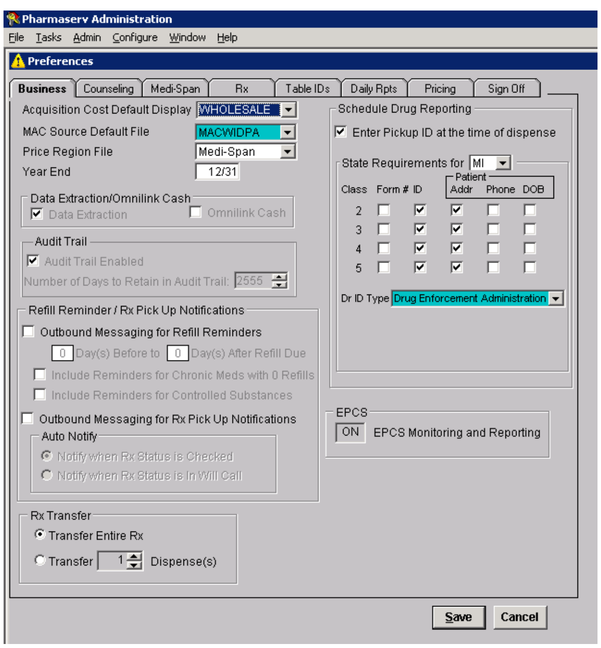
3. Enter the city codes for your patients, prescribers, and businesses in the Rx Processing application.

This section briefly explains how to complete the three steps above.

Setting System Preferences

System Preferences are established in System Administration on the server. MPS recommends that the System Administrator establish this information before any data entry begins. Access the Pharmaserv Administration application by clicking on the **Pharmaserv Administration** icon (below):

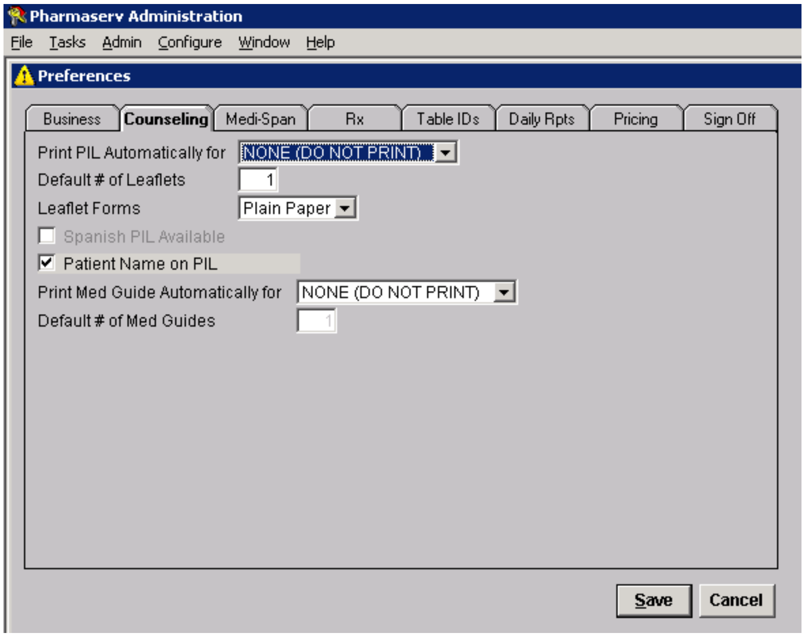
The default is ADMIN for both the Logon ID and Password. Click **Admin** on the menu bar and then click **Preferences**. The Business tab displays on the *Preferences* window similar to the following:



If the Business preferences are not displayed, click the **Business** tab.

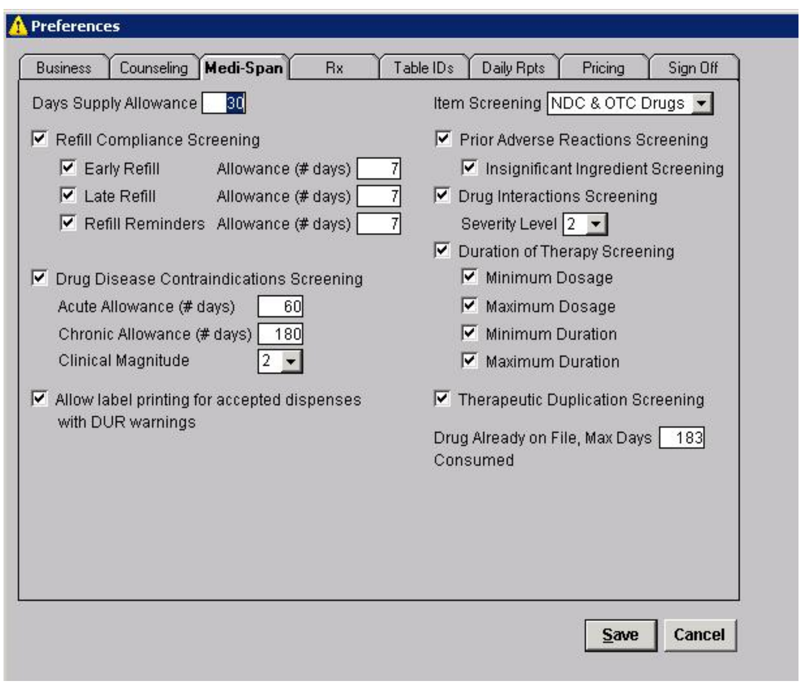
Review the Business preferences. Use the **Shift** and **F1** keys to access online Help regarding any of the fields.

Click the **Counseling** tab on the *Preferences* window to display the Counseling preferences:



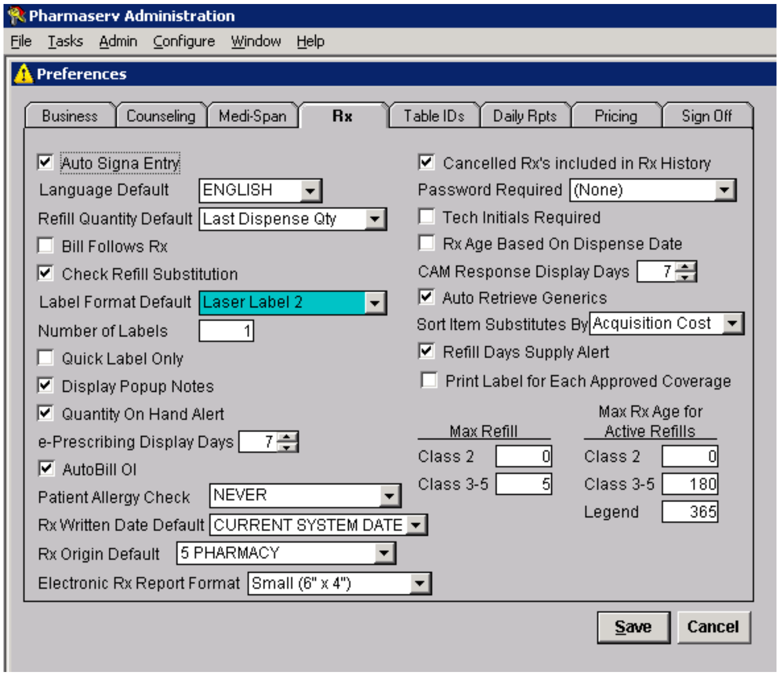
Review the Counseling preferences and make changes as needed. Use the **Shift** and **F1** keys to access online Help regarding any of the fields.

Click the **Medi-Span** tab on the *Preferences* window to display the Medi-Span preferences:



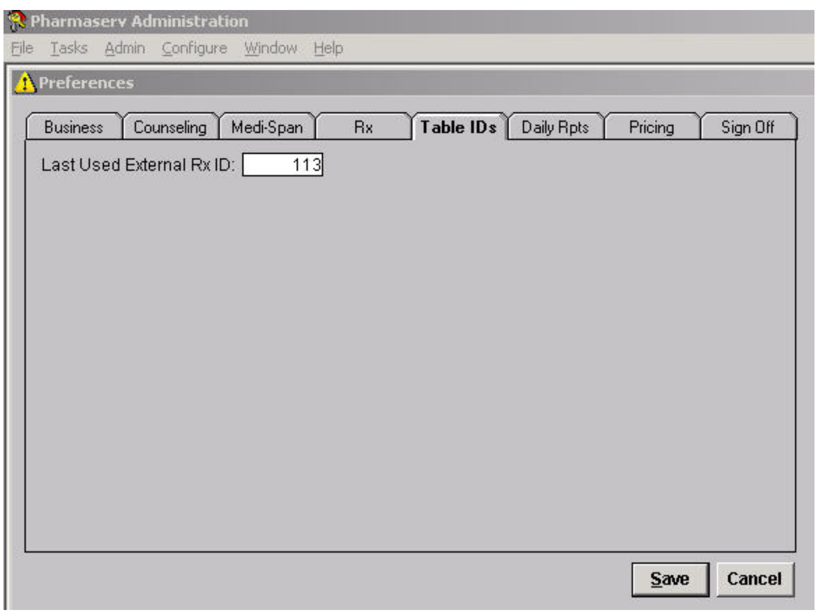
Review the Medi-Span preferences and make changes as needed. Use the **Shift** and **F1** keys to access online Help regarding any of the fields. The options selected determine what displays during various DUR screenings when filling prescriptions.

Click the **Rx** tab on the *Preferences* window to display the Rx preferences:



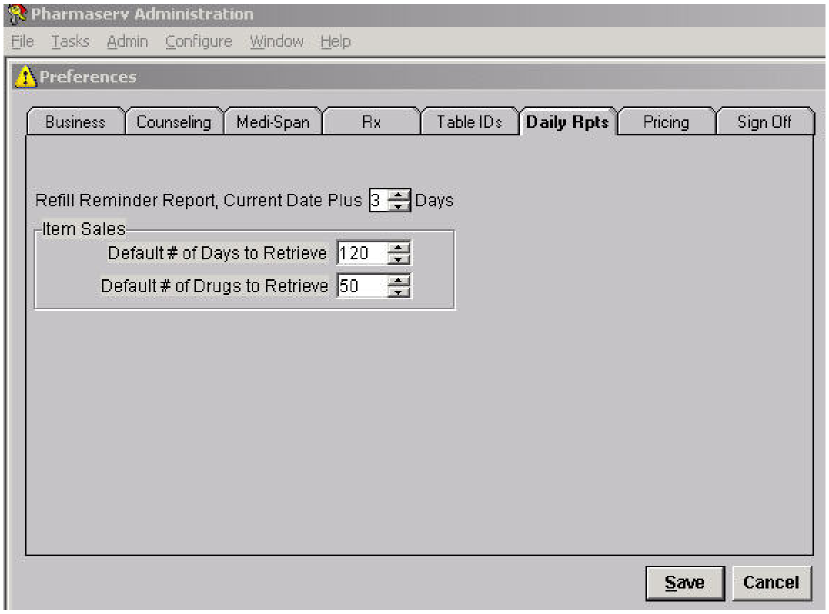
Review the Rx preferences and make changes as needed. Use the **Shift** and **F1** keys to access online Help regarding any of the fields. The Rx Preferences control the default language and label format for prescriptions, whether cancelled (deleted) Rxs display in the history, maximum number of refills, age of Class 2-5 items, and other functions related to the entry and display of Rx information.

Click the **Table IDs** tab from the *Preferences* window to display the last number used in your numbering sequence for your Rxs and counseling sessions:



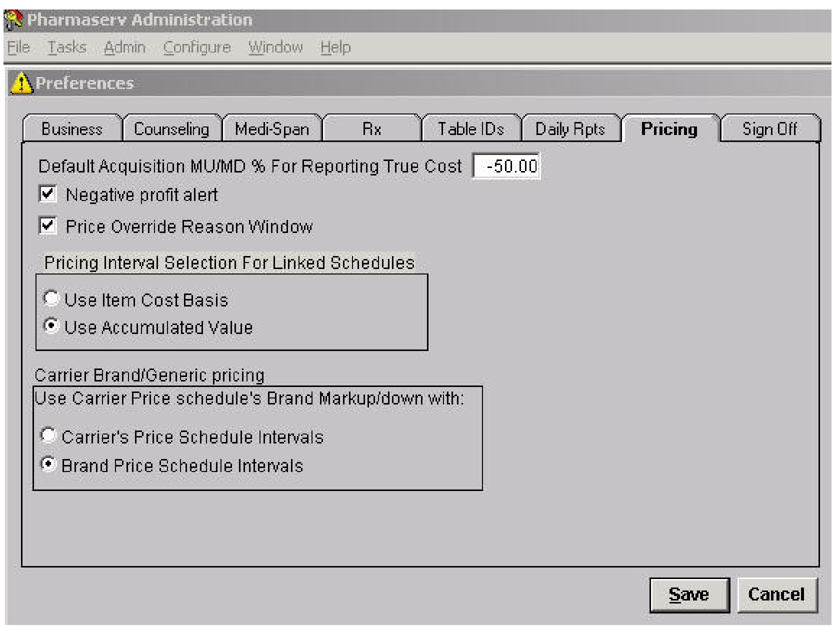
Review the numbering sequence and make changes as needed. The example displays the last number used was 113, therefore the next available number is 114. Use the **Shift** and **F1** keys to access online Help if needed.

Click the **Daily Rpts** tab from the *Preferences* window to determine the characteristics of your daily reports:



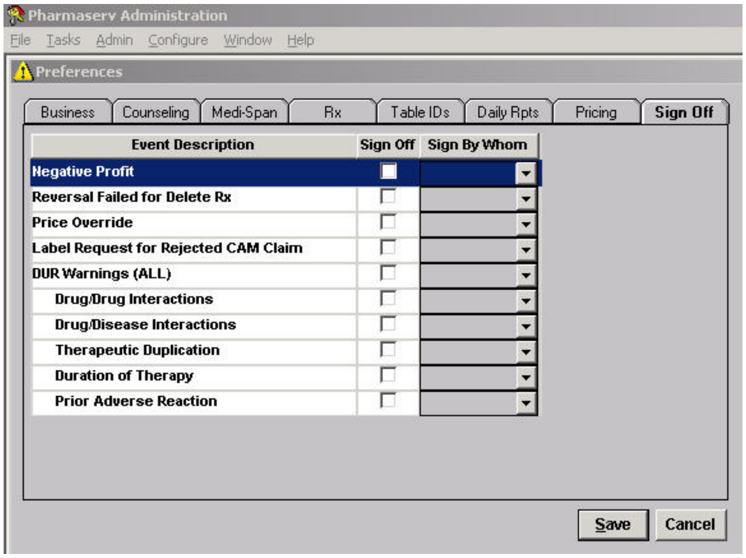
Review the Daily Reports preferences and make changes as needed. Use the **Shift** and **F1** keys to access online Help regarding any of the fields.

Click the **Pricing** tab from the *Preferences* window to display the Pricing preferences:



Review the Pricing preferences and make changes as needed. Use the **Shift** and **F1** keys to access online Help regarding any of the fields. The Pricing preferences enable you to select default acquisition adjustments, negative profit alert, price override, pricing interval for linked schedules and carrier brand/generic pricing options.

Click the **Sign Off** tab from the *Preferences* window to display the Sign Off preferences:



Review the Sign Off preferences and make changes as needed. Determine whether a pharmacist or technician has the authority to "sign off" or override the event (function) listed. If the field is blank, no sign off is required. When Technician is selected, both pharmacist and technician can sign off. Use the **Shift** and **F1** keys to access online Help regarding any of the fields.

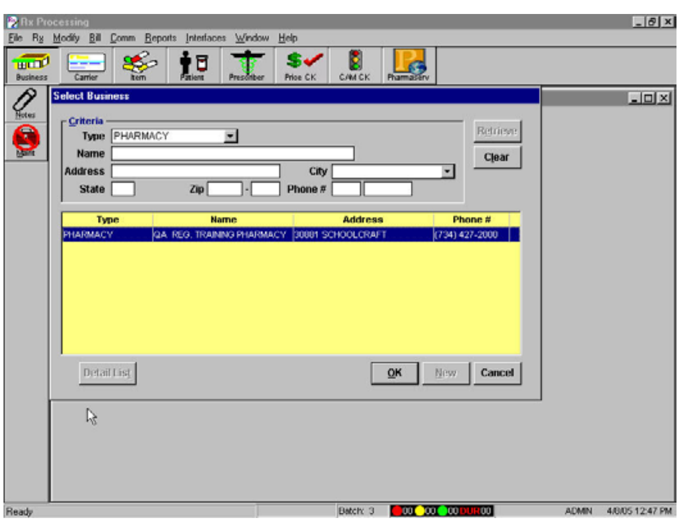
When you have selected all of your preferences, click **Save**. You are ready to establish other information to help you start using your pharmacy system. From the **File** menu, click **Exit** to exit Pharmaserv Administration.

Establishing Your Pharmacy Profile

You must establish information about your pharmacy before you begin filling prescriptions. This profile information is used throughout the system.

1. Access the Rx Processing application.

2. Select the Business module either from the Modify menu (click **Business**) or by selecting the ***Business*** horizontal tool bar button. The *Select Business* window opens similar to the following:



3. Click **OK** if the Pharmacy name is listed; or click **Pharmacy** from the Type drop-down list box and click **New**. The *Pharmacy Maintenance* window opens.

4. Enter or select the appropriate information for each field.

5. Remember, fields that are required display with a teal background. If you need information about the group field, press **Shift** and **F1** to display the field-level Help for details.

6. When all information is correct, click **Save** to save the business information.

Establishing City Codes

Many modules within the Rx Processing application require you to enter an address (for a patient, prescriber, carrier, etc.). City Codes enable you to enter city, state, and Zip Code information by entering up to a five character code. When filling Rxs, use this abbreviated code instead of typing all of the city related information each time. MPS recommends you establish your most frequently entered cities as city codes before entering your initial information.

1. Access the Rx Processing application.

2. Access *Code Maintenance* by clicking **Code** from the Modify drop-down menu.

3. Click the **City** vertical tool bar button to access *City Code Maintenance*. A window displays similar to the following:

4. To add a city code, click **Add** and type up to five characters to use as a code for each city, state, and Zip Code you use frequently. You can enter this code in place of the actual city, state, or Zip Code. (**NOTE:** Many pharmacists prefer to use the last three digits of the Zip Code for the City Code.)

5. Enter the city, state, and Zip Code to associate with the code. (For details about any of these fields, place the focus on the field and press **Shift** and **F1** to display the online Help for the field.)

6. Click **Save** to save the City Code.

7. Repeat steps 4-6 for each new City Code.

Verify Signa Codes and Caution Codes

While you are in the Code Maintenance module, you should review the Signa Codes and Caution Codes that were entered before your system was delivered.

1. To access the Signa Codes, click the **Signa** button.
2. Review and make changes as needed.
3. **Save** the changes or **Cancel** without making changes.
4. Access Caution Codes by clicking the **Cautions** button.
5. Review and make changes as needed.
6. **Save** the changes or **Cancel** without making changes.

You are ready to establish initial system information.

Establishing Initial System Information

Once you have customized your system in Pharmaserv Administration, you can start to establish initial system information. Because the information entered in one module is often used by another module it is important that you establish information in a specific order. Once you have established some initial information you can use the Rx Processing application to enter information as needed. This section covers establishing the following initial information (information must be established in the order listed):

- Pricing schedules (general pricing, copay, discount, premium, and special pricing)
- Tax table information
- Third party carriers (due to the sensitive nature of third party billing, MPS recommends that all third party carrier setup and maintenance information should be done with the help of an MPS representative.)
- Prescribers
- Businesses with which your pharmacy is connected
- Patients

Establishing Pricing

Pharmaserv enables you to accommodate many types of pricing schedules. Pricing takes into consideration many factors such as markups and markdowns to multiple types of costs, unit dose pricing, generic/brand pricing, patient discounting, and more.

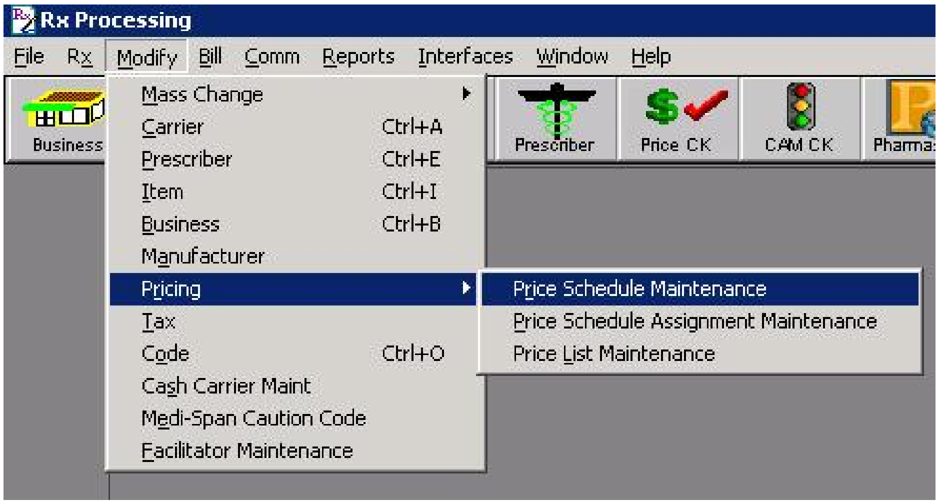
Enter your basic pricing strategies as a specific general pricing schedule. Rules for copays, discounts, premiums, and special pricing are entered separately. Following is a brief explanation of the types of pricing schedules:

Schedule Type	**Description**
Price (Default)	Enables you to add price detail for use when pricing Rxs. Default price schedules (cash pricing) are the starting point for all Rx pricing. This identifies cost basis, markups, fees, etc. You must establish at least one price schedule for your default pricing.
Copay	A schedule for copayments based on patient age, Rx cost, Rx price, or days supply.
Discount	Enables the calculated price of each Rx to be adjusted by a specific amount, usually associated with a patient. The basis of the discount may be Rx price, Rx cost, and/or patient age. MPS provides a default discount pricing schedule based on age as part of your base data supplied with your pharmacy system. You can use this schedule or modify it as needed. Only one age discount schedule is allowed.
Special Price	Pricing to designate retail prices for a specific quantity of a selected item (e.g., 30 of an item is \$3.00, 60 of the item is \$5.50, etc.).
Premium	An addition or subtraction to the calculated final price of an Rx based on the dispensed item's form, category, class, and/or type.

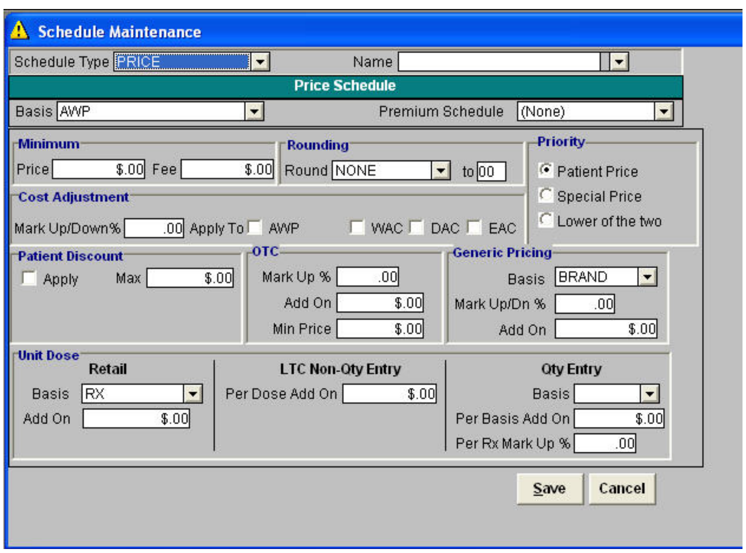
MPS provided a Pre-Install Guide with worksheets for helping you determine your pricing strategies. You can use these worksheets to help you enter the pricing schedules.

If you provided MPS with printouts of your current pricing strategy, an MPS representative has already created your pricing schedules for you.

All types of price schedules are established by using *Schedule Maintenance.* To access the *Schedule Maintenance* window, click **Modify** to display the menu similar to the following:



Click **Price Schedule Maintenance** and a window displays similar to the following:

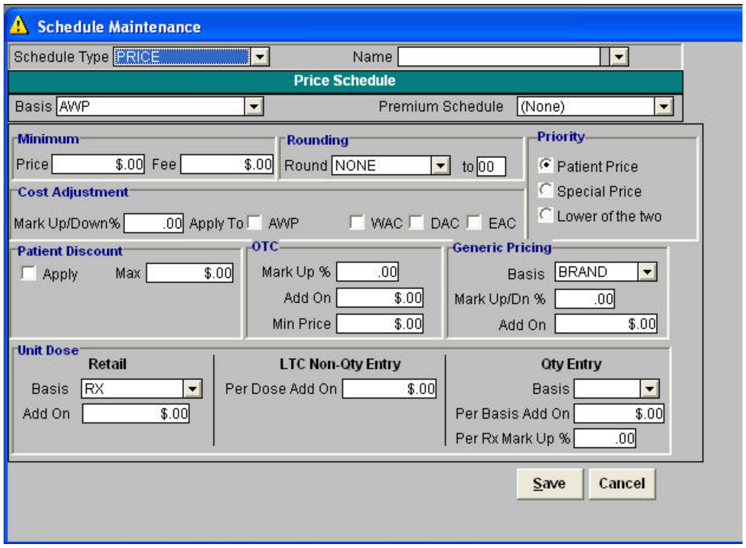


Selecting the Type of Pricing Schedule to Add

From *Schedule Maintenance*, select the type of price schedule you want to enter from the Schedule Type drop-down list box. Enter a name for this schedule in the Name field and press **Tab**. Click **Yes** to indicate you want to add a new schedule. The appropriate pricing schedule window displays enabling you to enter the schedule.

Entering "Price" Schedule Type

Select *Price* as the Schedule Type and a *Price Schedule* window displays similar to the following:



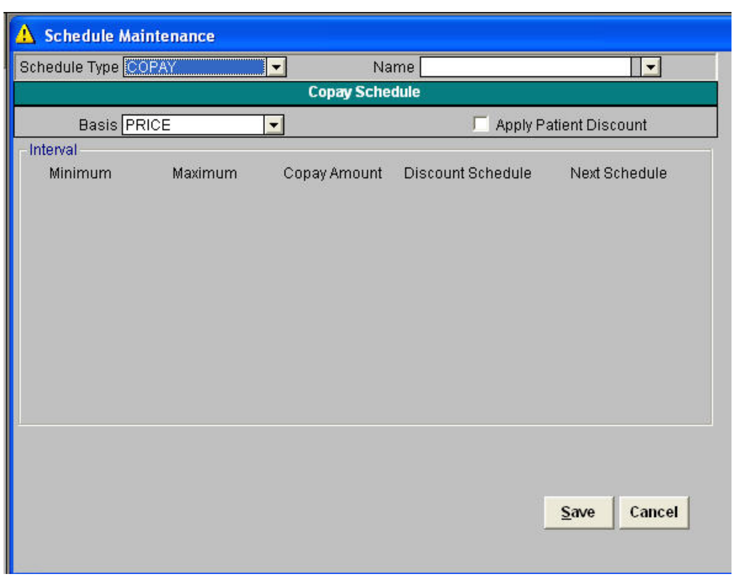
NOTE: The Basis field in the Generic Pricing area (above) defaults to BRAND. This indicates the brand name item cost is used as the basis for calculating the generic selling price for generics using this schedule. Select the **GENERIC** option from the Basis field to price a generic item from its own item cost.

When you complete entries in this window, click **Save**. Then click **Interval** to enter the pricing intervals. Pricing intervals are the pricing minimum and maximum range, fee amount (dollar value), and the fee percent to be added to an Rx under this pricing schedule. If both the fee amount and fee percentage are used, the price is calculated to add the dollar amount first and then add a percentage.

Add as many interval levels that you need. Click **Save** to save the intervals.

Entering "Copay" Schedule Type

When *Copay* is the Schedule Type selected, the *Copay Schedule* window displays similar to the following:

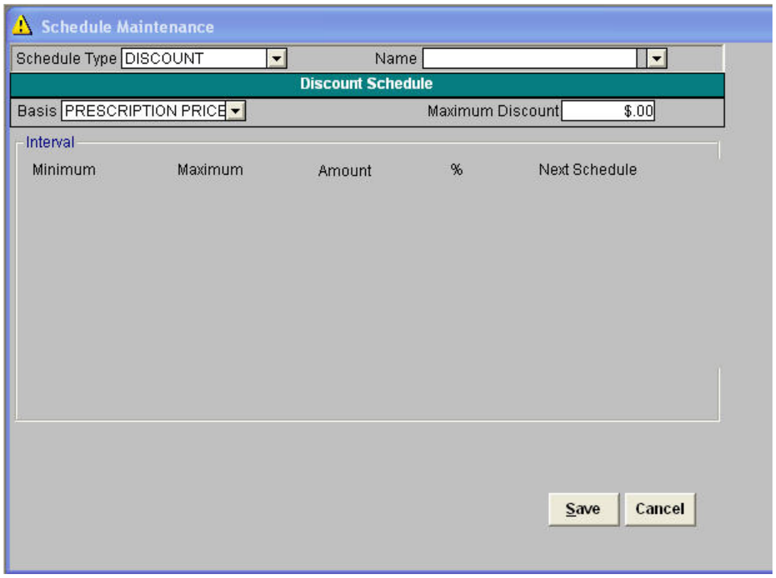


Enter copay pricing information in this window. Pricing intervals are the pricing minimum and maximum range, copay amount (dollar value or percentage) to be added to an Rx under this pricing schedule. Select the Basis of the copay from the drop-down menu. The copay amount is determined by your choice in the Basis field. Refer to online Help for field information, if necessary.

After you have entered information click **Save**.

Entering "Discount" Schedule Type

When *Discount* is the Schedule Type selected, the *Discount Schedule* window displays similar to the following:



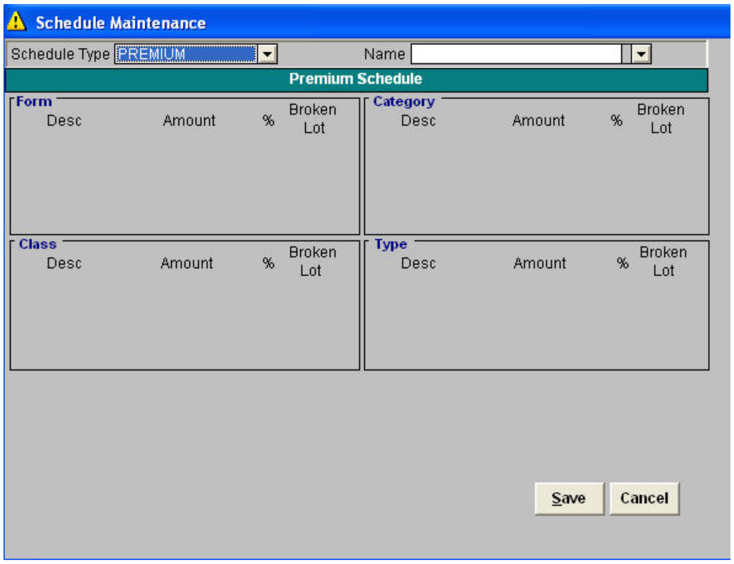
Enter discount pricing information on this window. Pricing intervals are the pricing minimum and maximum range, discount amount (dollar value), or the percent of discount to apply to an Rx under this pricing schedule. If both the Amount and % are used, the price is calculated to subtract the dollar amount first and then subtract the percentage amount. Refer to online Help for field information if necessary.

After you have entered information, click **Save**.

NOTE: To verify the discount applies to the appropriate schedules, check the Apply option (for that schedule) in the Patient Discount area on the *Price Schedule* window.

Entering "Premium" Schedule Type

When *Premium* is the Schedule Type selected, the *Premium Schedule* window displays similar to the following:

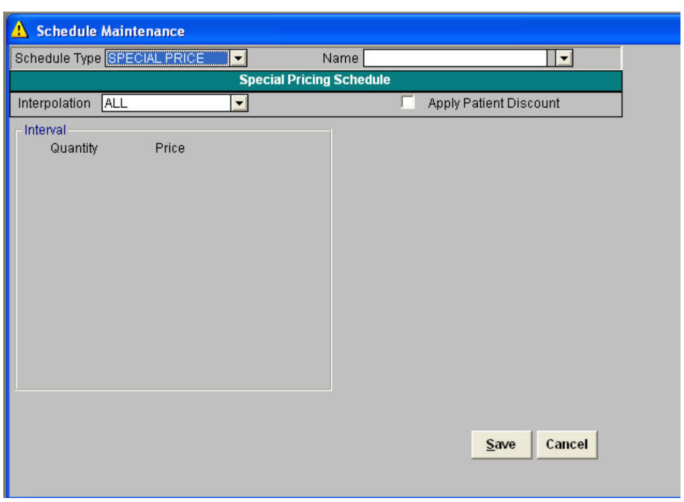


Enter the premium pricing information on this window. Premium schedules are based on the attributes of an item defined in one or all of the four group boxes. Define a premium dollar amount or percentage amount to add to or subtract from the final calculated price. The premium schedule can be attached to a specific price schedule. Refer to online Help for field information if necessary.

After entering information, click **Save**.

Entering "Special Price" Schedule Type

When *Special Price* is the Schedule Type selected, the *Special Pricing Schedule* window displays similar to the following:



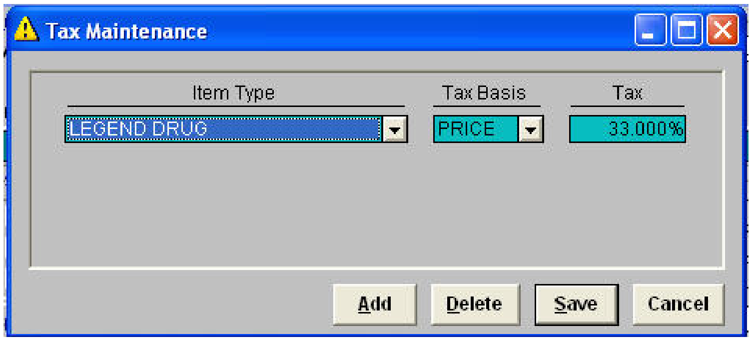
Enter special pricing information on this window. Special pricing enables you to define exact retail prices for specific quantities of a selected item. Refer to online Help for field information if necessary. Special Price schedules are attached to the item in the *Pricing* window in Item Maintenance.

After entering information, click **Save**.

Entering Tax Information

Because tax rates vary from state to state and for different item types, you may need to establish tax rates for items.

1. Access *Tax Maintenance* from the Modify menu by clicking **Tax**. A window opens similar to the following:



2. To add tax information for an item, click **Add**.

3. Enter the Item Type, Tax Basis, and Tax amount. For details about these fields, place the focus on the field and press **Shift** and **F1** to display the online Help.

4. Repeat steps 2-3 for each item that needs a tax rate.

5. When all tax rates have been entered, click **Save**.

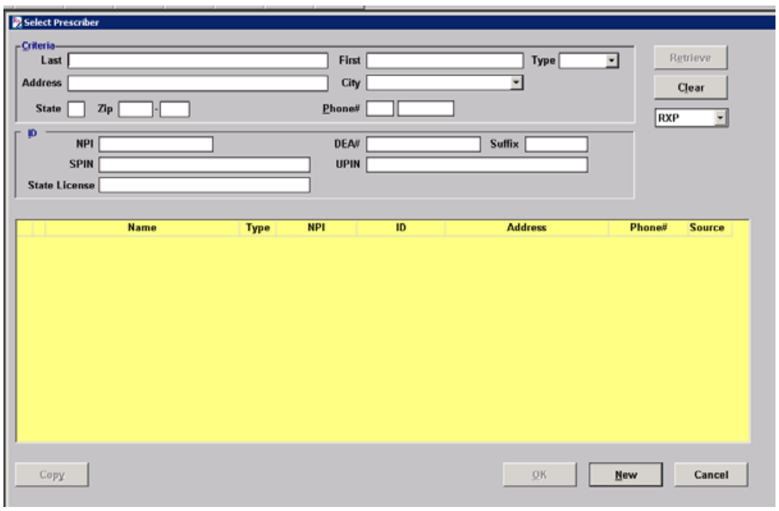
Entering and Importing Third Party Carrier Information

Please consult an MPS representative regarding establishing, maintaining, and importing third party carriers.

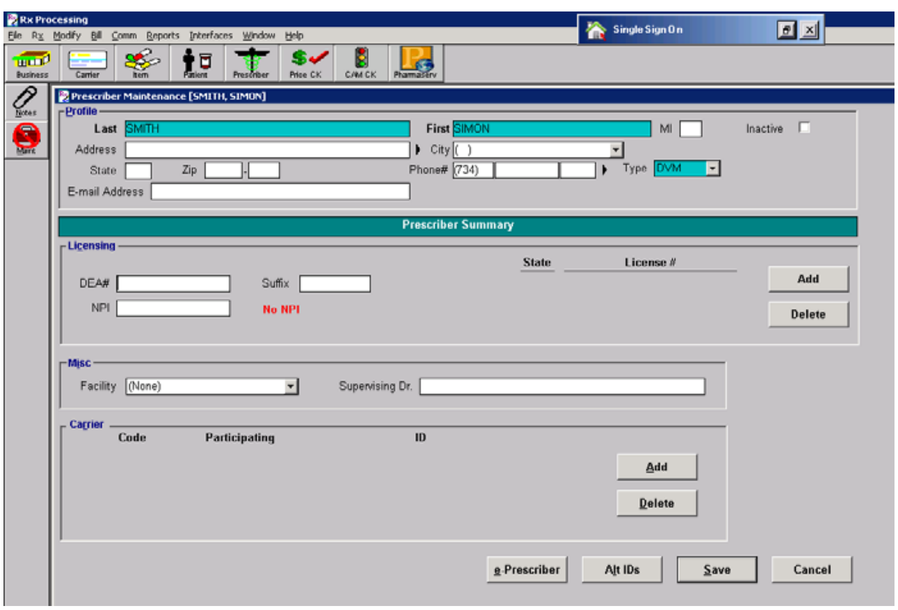
Entering Prescribers

Before filling and billing prescriptions, you should establish information about those prescribers with which you do business. The Rx Processing application enables you to enter prescriber information while filling a prescription. However, you may want to establish some often-used prescribers in advance for faster processing. **NOTE:** If you are converting data from a competitor's system, the information may already have been converted and added to the system.

1. Access the Prescriber module from the Modify menu by clicking **Prescriber** or by clicking the *Prescriber* horizontal tool bar button. The *Select Prescriber* window opens similar to the following:



2. Enter the last name of the prescriber and click **Retrieve** to see if the prescriber already exists. If not, click **New**. The *Prescriber Maintenance* and *Prescriber Summary* windows open similar to the following:



3. Enter the information in the *Prescriber Maintenance* and *Prescriber Summary* windows.
   NOTE: The state license number is entered in the *Prescriber Alternate ID Maintenance* window. For details about fields on these windows, place the mouse pointer in the field and press **Shift** and **F1** to display the online Help.

4. To assign an alternate ID number to the prescriber, click **Alt IDs**. The *Prescriber Alternate ID Maintenance* window opens. Select an ID Type and enter the associated ID number. Refer to online Help for field information if necessary.

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

6. Repeat steps 2-5 for each prescriber.

Entering Businesses

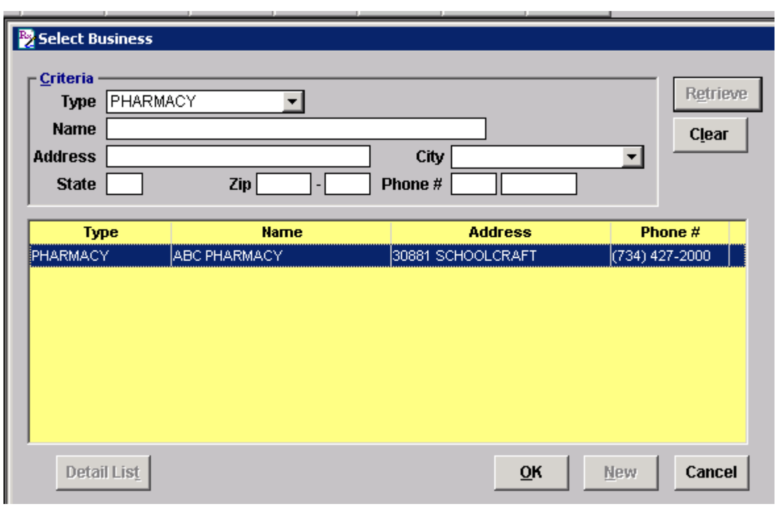
Rx Processing enables you to enter and maintain information on the businesses with which you work, including your pharmacy. Information on entering your initial pharmacy information was covered in *Customizing Rx Processing.*

When you enter a profile for a business associated with your pharmacy, you must assign the business a type. The type of business reflects the information you may enter about the business.

Rx Processing enables you to enter the following business types in addition to your pharmacy:

- Employer
- Facility
- HL7 Partner (**NOTE:** You must be licensed to use the HL7 feature to enter this type.)
- Supplier
- Transfer Pharmacy

All types of businesses are established in *Select Business* in the Business Module. To access the *Select Business* window, click the Business horizontal tool bar button or, from the Modify menu click **Business**. The *Select Business* window opens similar to the following:

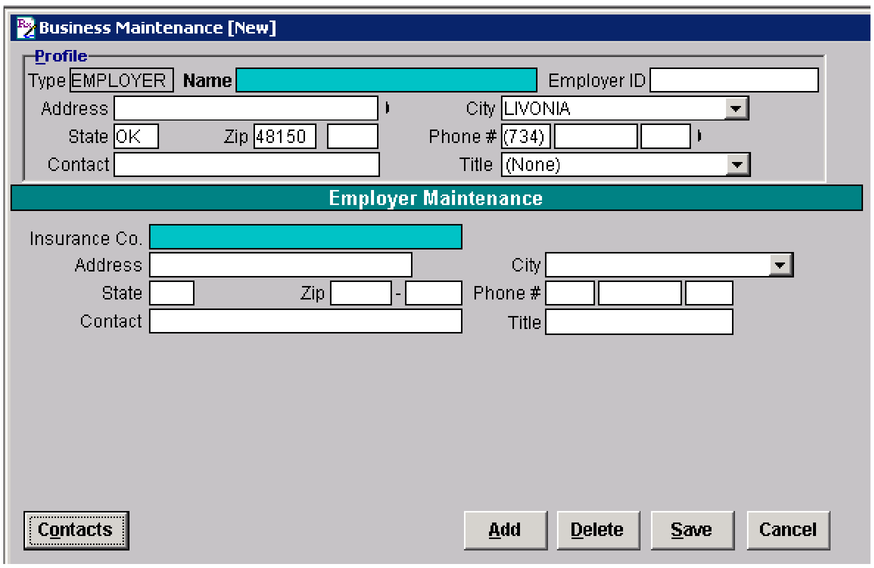


Entering The Type of Business

From the Criteria area on the *Select Business* window, select the type of business you want to enter from the Type drop-down list box.

Entering Employers

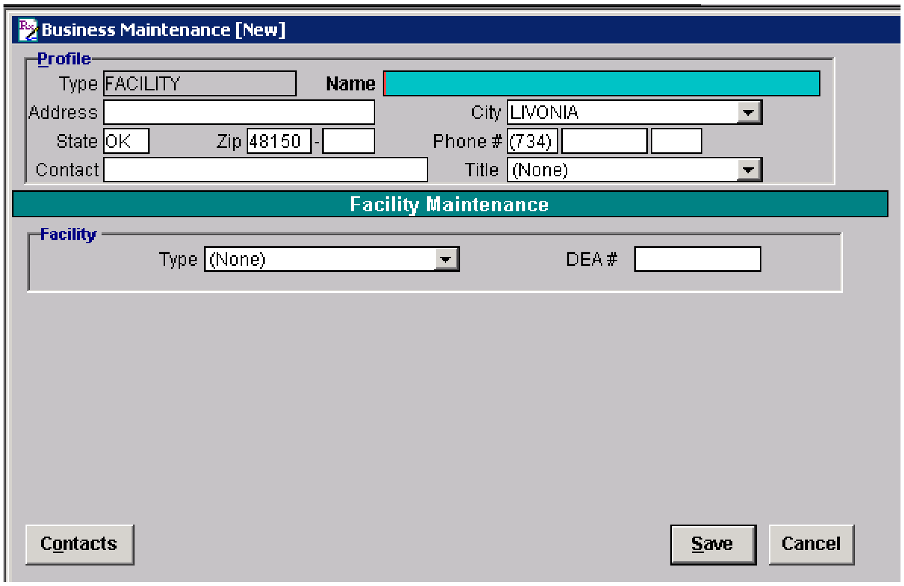
To enter employer information (e.g., for Workers Compensation), select *Employer* from the Type drop-down list box, then click **New**. The *Business Maintenance* and *Employer Maintenance* windows open similar to the following:



Enter information in the *Business Maintenance* and *Employer Maintenance* windows. Click **Save** to save the information.

Entering Facilities

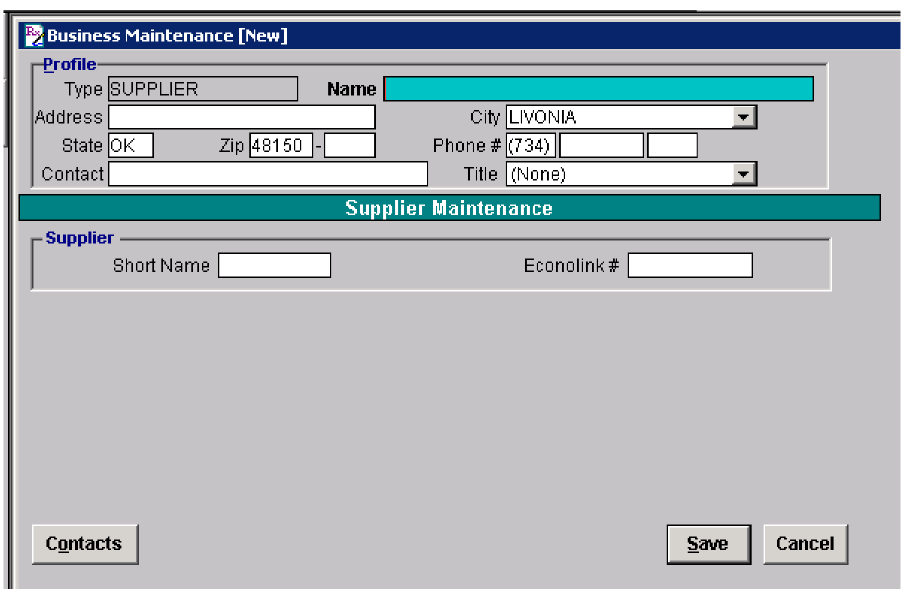
To enter facility information (e.g., nursing homes, hospitals), select *Facility* from the Type drop-down list box, then click **New**. The *Business Maintenance* and *Facility Maintenance* windows open similar to the following:



Enter the information in the *Business Maintenance* and *Facility Maintenance* windows. Click **Save** to save the information.

Entering Suppliers

To enter supplier information (e.g., wholesalers), select *Supplier* from the Type drop-down list box and click **New**. The *Business Maintenance* and *Supplier Maintenance* windows open similar to the following:

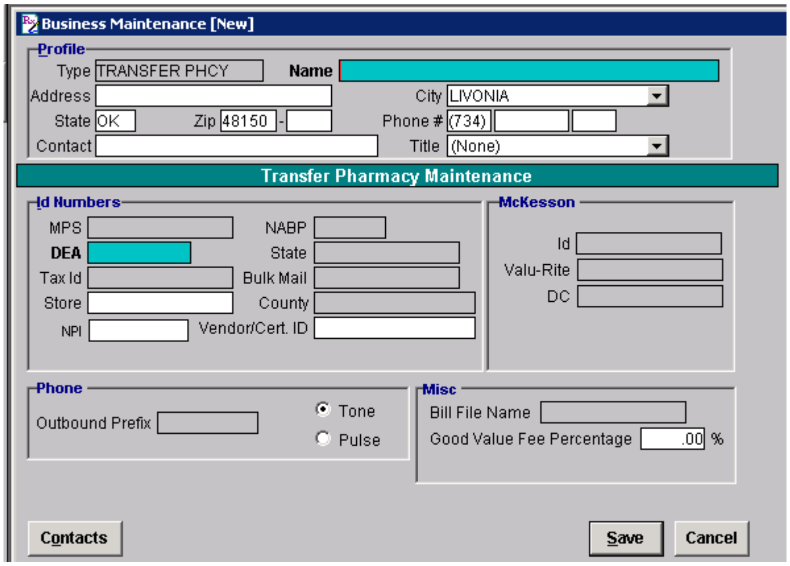


Enter information in the *Business Maintenance* and *Supplier Maintenance* windows. For details about any of the fields on these windows, place the focus on the field and press **Shift** and **F1** to display the online Help.

Click **Save** to save the information.

Entering Transfer Pharmacies

To enter information about pharmacies that you transfer Rxs with, select *Transfer Phcy* from the Type drop-down list. Then click **New**. The *Business Maintenance* and *Transfer Pharmacy Maintenance* windows open similar to the following:

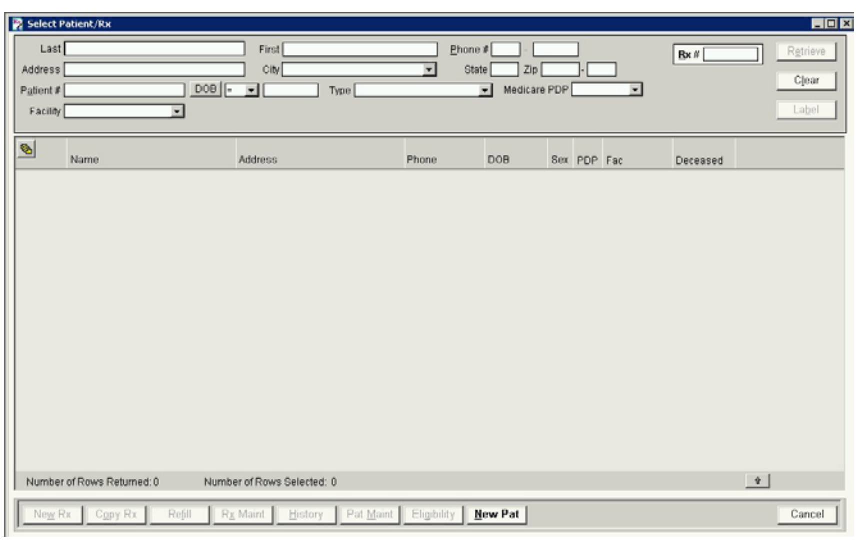


Enter information in the *Business Maintenance* window. In *Transfer Pharmacy Maintenance,* the only required information is the DEA number and the name of the pharmacy. For details about these fields, place the focus on the field and press **Shift** and **F1** to display the online Help. Click **Save** to save the information.

Entering Patient Information

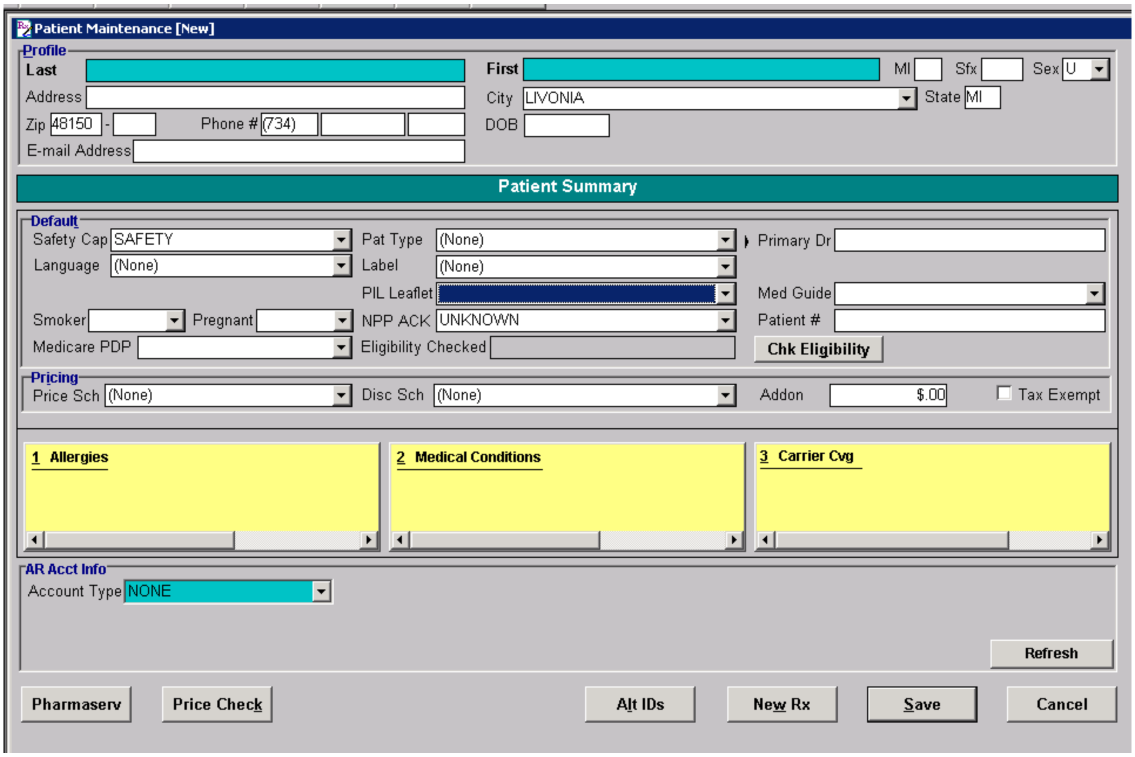
You can enter new patient information at any time. Before you begin using the Pharmaserv system, you might want to enter information about your current patients. Or, you can wait and enter information when the patient comes in for a prescription. **NOTE:** If you are converting data from another system, the information may already have been converted and added to the system.

1. Access the *Select Patient/Rx* window from the Rx menu by clicking **Patient/Rx** or by clicking the *Patient* horizontal tool bar button. The *Select Patient/Rx* window opens similar to the following:



2. Search for the customer first by entering the patient's last name and first name. Click **Retrieve**.

3. If the customer does not exist in the patient file, click **New Pat**. The *Patient Maintenance* and *Patient Summary* windows display similar to the following:



4. Enter other information in the fields in the Profile area and click **Save**.

5. Assign the patient to a family or as the Head of Family, when prompted. Instructions for assigning a patient to a family can be found in the online Help.

6. Click **OK** to exit the *Select Family* window.

7. Enter information in the remaining *Patient Maintenance* fields.

8. Enter information in the *Patient Summary* areas.

9. Click **Save** to save the information.

Entering Additional Patient Information

While not required, you may enter the following additional patient information: Allergies, Medical Conditions, Insurance Coverage, Vital Signs, Counseling Information, and Notes.

To enter patient allergies

1. Enter allergies, by moving the focus to the Allergies view area.

2. Click the **Maint** vertical tool bar button.

3. Click **Add**.

4. Enter information as needed.

5. Repeat steps 3 and 4 to add other allergies.

6. Click **Save** to return to the *Patient Summary* window.

To enter patient medical conditions

1. Move the focus to the Medical Conditions view area. **NOTE:** For use in adjudication, the medical conditions must be assigned to an Rx via the *Clinical Information* window. You can use the description NO KNOWN MED CONDITION when a specific condition is not listed in the Description field.

2. Click the **Maint** vertical tool bar button.

3. Click **Add**.

4. Enter information as needed. **NOTE:** You can select the NO KNOWN MED CONDITION option when a specific condition is not listed in the Description field.

5. Repeat steps 3 and 4 for each medical condition to add.

6. Click **Save** to return to the *Patient Summary* window.

To enter patient insurance coverage information

1. Move the focus to the Carrier Cvg view area.

2. Click the **Maint** vertical tool bar button.

3. Complete the information in the Patient area on the *Patient Coverage Summary* window and click **Save**.

4. Click **Add**. The *Select Carrier* window displays.

5. Enter a Carrier Code and click **Retrieve**. Select a code (if more than one displays) and click **OK**.

6. Complete the information in the *Patient Coverage Details* window.

7. Repeat steps 4 through 6 for each coverage.

8. Click **Save** twice to save information and return to the *Patient Summary* window.

To enter patient vital signs

1. Click the **Vitals** vertical tool bar button.
2. Click **Add** and enter information as needed.
3. Repeat step 2 for each new vital sign.
4. Click **Save** to return to the *Patient Summary* window.

To enter patient counseling information

1. Select the **Counsel** vertical tool bar button.
2. Click **New**.
3. Enter the information as needed.
4. Repeat steps 2 and 3 for each counseling session.
5. Click **Save** to return to the *Patient Summary* window.

To enter notes about the patient

1. Click the **Notes** vertical tool bar button. **NOTE:** Be certain that the focus is not in the Allergies, Medical Conditions, or Carrier Cvg areas.
2. Select the Note Type from the drop-down list box.
3. Enter information in the Note Text area.
4. To add more than one note, click **New Note** and then repeat steps 2 and 3.
5. Click **Save** to return to the *Patient Summary* window.

Appendix A

Base Data

To enable you to begin using your Pharmaserv system, McKesson Pharmacy Systems has provided some base data already loaded on your system. This chapter identifies the base data that has been loaded.

Item File

An extensive item file has been loaded to your system. Customers converting from a competitor's system have the Drug File converted if requested and, if you provided MPS with printouts of your pricing strategy, an MPS representative creates the pricing schedules for you.

Pricing Schedules

A default Price Schedule, based on AWP, is provided with your system. No fees have been applied. A default Discount Schedule, based on patient age, is also provided with your system. You may use either pricing schedule or modify as needed.

Cash Carrier

A cash carrier has been established on your system. You may set up defaults in Cash Carrier Maintenance.

Frozen Codes

Certain code groups have been defined by MPS and cannot be added to or changed. Codes are "frozen" for various reasons:

- The codes are the same for all users and no other variations are valid
- The codes are defined by an outside source and must be the code used by that source
- Codes are common abbreviations that the Pharmaserv system uses

Some examples of frozen codes are:

- The two character code for each state
- Allergy classification codes used by the Medi-Span database
- Codes of Y for Yes and N for No
- Business type codes that display the appropriate *Business Maintenance* window
- Maximum Allowable Cost source files

Codes that are frozen do not display as an option in *Code Maintenance.*

Modifiable Codes

For some modifiable code groups, MPS has defined some base codes for you. Other code groups are unique to each pharmacy and no codes have been defined.

Base Codes Assigned

The following code groups have base codes already assigned:

- Caution Codes
- Item color
- Item flavor
- Language
- Maximum patient age
- Minimum patient age
- Potency Unit
- Price override reason
- Item Shape
- Signa Codes
- User Category
- Vital signs

You may add additional codes to any of the categories in these code groups.

User Defined Codes

The following code groups have no codes assigned:

- Claim Status
- EPSDT (Early Planning Screening Diagnosis Treatment)
- Patient Types
- City Codes

You can add additional codes to any of the categories in these code groups in Code Maintenance.

Codes can be assigned to the following code groups while adding patient information:

- Medical Conditions text
- Allergies text

Appendix B

Understand The *Pharmadmin* User

The Pharmacy Store Manager (pharmadmin) ID/Role and the associated password is the “key” that opens the Pharmaserv system and enables you to determine user access to the system. Your Pharmaserv system is shipped with a management account setup with a temporary password that can be provided to you by an MPS representative.

Pharmadmin is a temporary store manager ID provided to enable you to create and assign other users including assigning the Store Manager role. The first user created should be for the person that will be designated as Store Manager. Once created pharmadmin should be logged out of and no longer used.

Store Manager Role

The Store Manager login provides a central point for managing your system users. You may want to limit the following information to one individual or a small group of individuals. A Store Manager is a person in your organization who is responsible for performing and monitoring key system functionality including:

- Create user accounts
- Manage users (disable, enable, and delete users, reset or unlock accounts, and designate a user as a store manager)
- Install all Pharmaserv software and upgrades
- Maintain Microsoft Windows updates

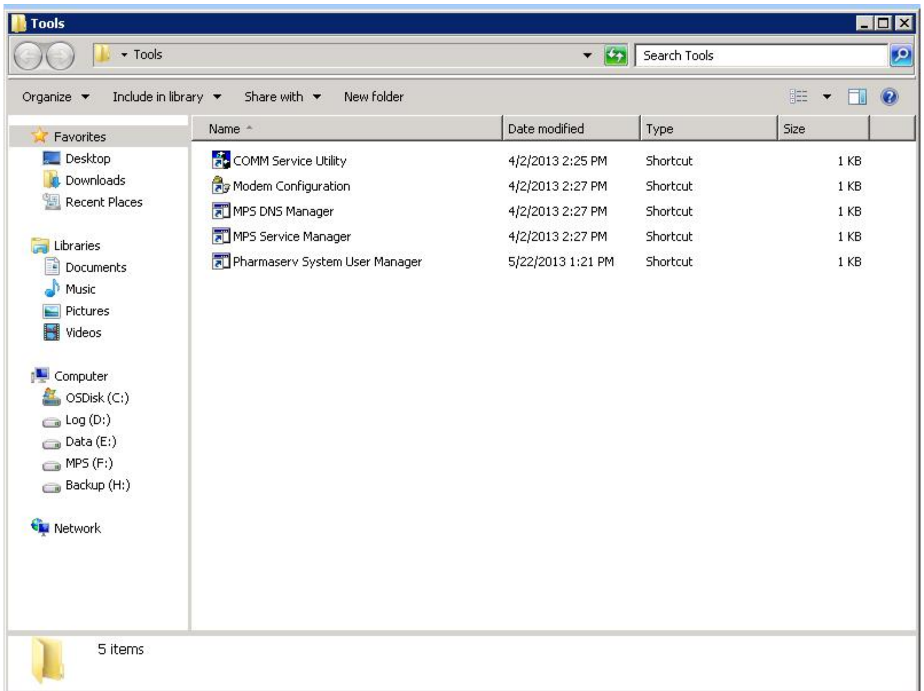
Consult with your MPS Field Installation Consultant for more information.

Create User Accounts

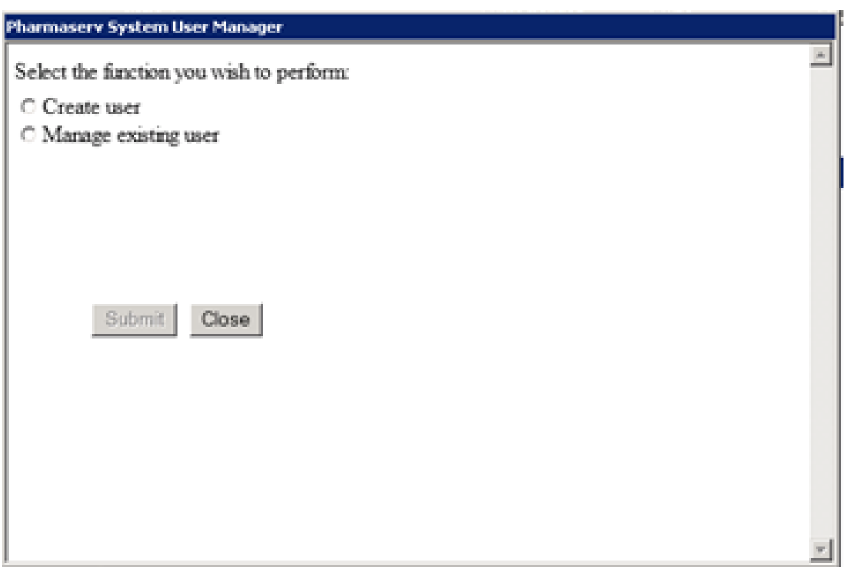
Before creating individual accounts, you should determine a naming convention to easily track accounts. A simple naming convention would be to use the first initial and the last name. For example, John Doe would become *Jdoe*.

Complete the following steps to create a new user:

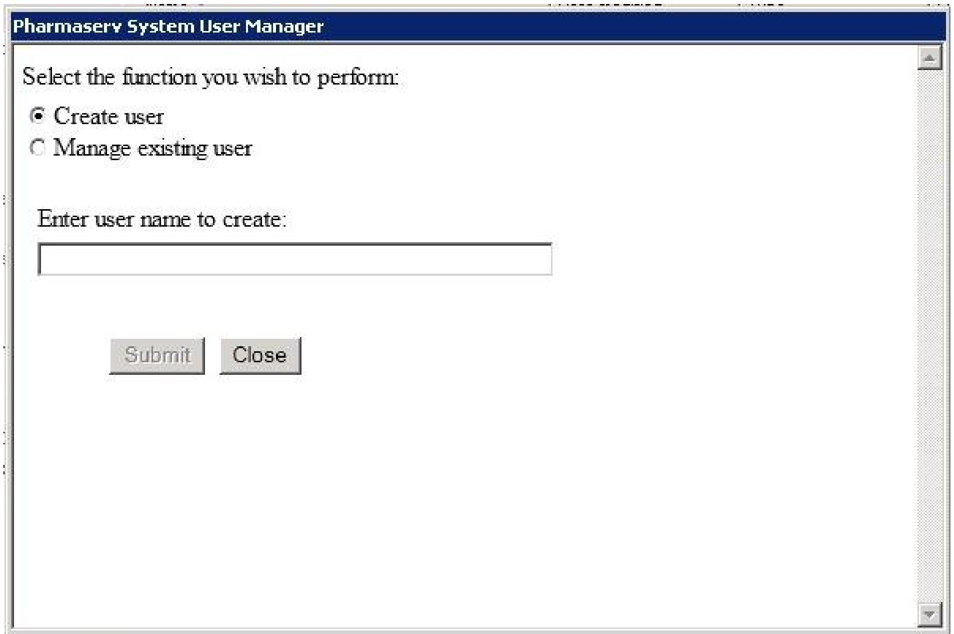
1. Click the **Tools** icon on the desktop. The *Tools* window displays similar to the following:



2. Double-click the **Pharmaserv System User Manager** option. The *Pharmaserv System User Manager* window displays similar to the following:

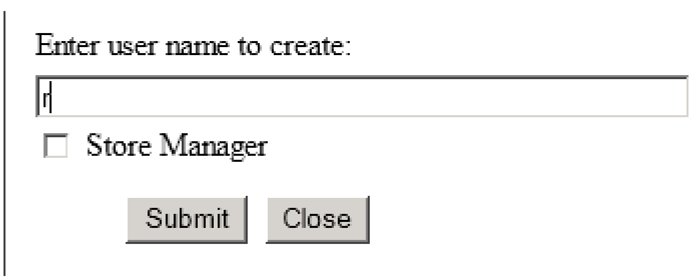


3. Click the **Create user** button. A window displays similar to the following:



4. Type the name of the user in the **enter user name to create** field. You can enter up to 20 characters. You cannot use spaces and it is strongly recommended not to use special characters.

   NOTE: To designate the user as store manager, check the **Store Manager** check box. The **Store Manager** check box displays after you type one character in the **Enter user name to create** field similar to the following:



   A Store Manager is a user with privileges to manage (create, modify, delete, etc.) other users and to run Pharmaserv upgrades.

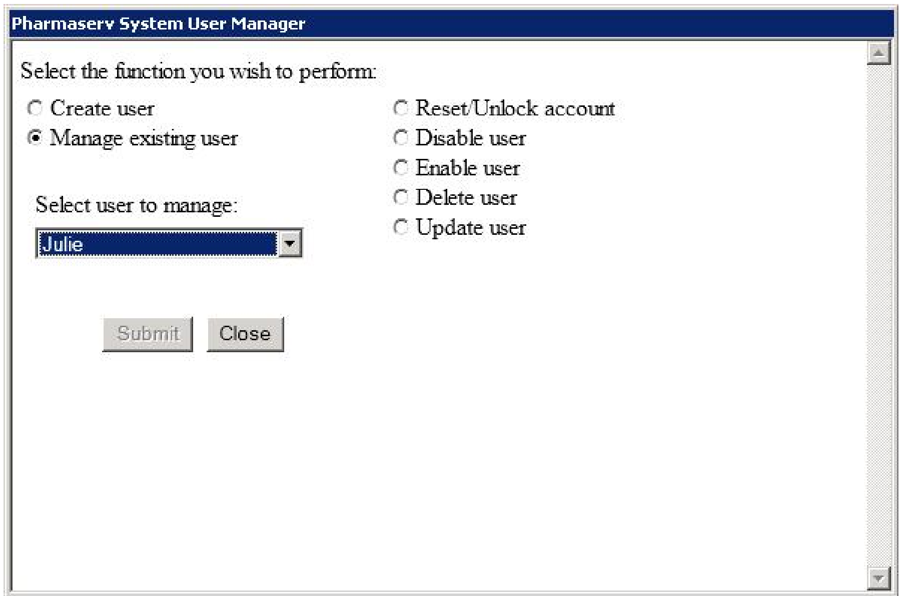
5. Click **Submit** to save your entry. A confirmation window displays with the initial password for the account. The user is required the first time they log into the system to use this password to access the system and create their own personalized password. Passwords must have a minimum of at least one upper case alpha character, one lower case alpha character, one numeric character, and one special character. Passwords are valid for 90 days at which time you will be prompted to create a new password.

Managing Users

You can disable, enable, and delete users, reset or unlock accounts, and designate a user as a store manager.

Complete the following steps to manage existing users:

1. Click the **Tools** icon on the desktop. The *Tools* window displays.
2. Double-click the **Pharmaserv System User Manager** option. The *Pharmaserv System User Manager* window displays.
3. Click the **Manage existing user** button. The Select user to manage drop-down list displays.
4. Select the name of the user for which you want to make changes. Your window should look similar to the following:



5. Perform one of the following actions:
   - To reset or unlock a user account, select the **Reset/Unlock account** button.

     NOTE: If you reset a user account, a temporary password is provided for you to create a new password.
   - To disable a user, select the **Disable user** button.
   - To enable a user, select the **Enable user** button.
   - To delete a user, select the **Delete user** button.
   - To designate a user as store manager, select the **Update user** button and then check the **Store Manager** check box. Only a Store Manager has permission to access the Pharmaserv System User Manager utility.
6. Click **Submit** to save you entry.
7. Click **OK** at the confirmation window.

Install All Pharmaserv System Software And Upgrades

The *Store Manager* accounts are the only accounts that provide access to install Pharmaserv system upgrades. To be compliant with your contract with McKesson Pharmacy Systems, you must install all Pharmaserv software upgrades from McKesson Pharmacy Systems.

NOTE: MPS does not support non-MPS software and it should never be installed on your SERVER system. You should contact an MPS support representative to determine software compatibility issues if you are considering the use of non-MPS software on a client system.

Maintain Microsoft Windows Updates

If you are connected to the Internet, Microsoft periodically releases system security updates. A small yellow shield or globe icon may also display in the system tray. When updates are available from Microsoft, a message displays similar to the following:

New updates are ready to install. Click here for more information.

Click **OK** (or double-click the icon) and follow the prompts to install the updates.

NOTE: Some system security updates require a system restart at the server system. When necessary, you are prompted to restart your system now or later. When you decide to restart your system, be certain that all users are logged off the Rx Processing and Pharmaserv applications and logged off from the Remote Desktop session.

To verify you have the latest updates installed:

1. Open Internet Explorer and click **Tools**.
2. Click **Windows Updates** and follow the prompts on the *Windows Update* window.

Service Pack Updates

Please contact MPS before loading Service Pack Updates from Microsoft as these must be approved by MPS prior to installation.

McAfee VirusScan

McAfee VirusScan is the virus protection software approved for use with systems from MPS. The system is configured to automatically pull updates from the following URLs if connected to the Internet. If FTP fails, it tries HTTP.

FTP: ftp://ftp.nai.com/commonupdater or HTTP: http://download.nai.com/Products/CommonUpdater

Rebooting (restarting) The Server

MPS suggests rebooting your server for only the following reasons:

- A Pharmaserv Upgrade instruction
- After a Microsoft Windows Update
- As requested by an MPS representative