SOUTHWOOD PHARMACEUTICALS

Using ScriptPlus

Edition 1, 8/2004

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1

Getting Started

This chapter will provide an overview of the ScriptPlus program and assist with installation and setup.

What is ScriptPlus?

ScriptPlus is a complete medication management software system, that facilitates the dispensing of Southwood Pharmaceuticals' pre-packaged prescriptions and orthopedic products.

ScriptPlus includes the following features:

- An easy to use, familiar interface
- Integrates with most practice management software
- Facilitates the dispensing of all Southwood Pharmaceutical product lines
- Streamlines Reimbursement through multiple methods: (HCFA, 3rd Party, Cash)
- Provides reimbursement audit and reconciliation tools
- Delivers HIPAA compliance with extensive security options
- A fully customizable SIG builder for patient directions
- Brand/Generic description cross reference for dispensed items
- Mandatory state controlled substances report generator
- Drug dispensing compliance transaction reports
- Issues product utilizing bar codes to improve your speed and accuracy
- Will maintain perpetual inventory of dispensing formulary
- Provides an automated purchase order function with user-defined stocking levels
- Prints patient-specific prescription labels
- Prints Patient Education Leaflets to meet patient drug advisory requirements

Installation and Setup

Install the Dymo® LabelWriter™

ScriptPlus is designed to work with the Dymo LabelWriter, using labels available exclusively from Southwood Pharmaceuticals.

Unpack and install the Dymo LabelWriter, following the installation instructions included with the LabelWriter product.

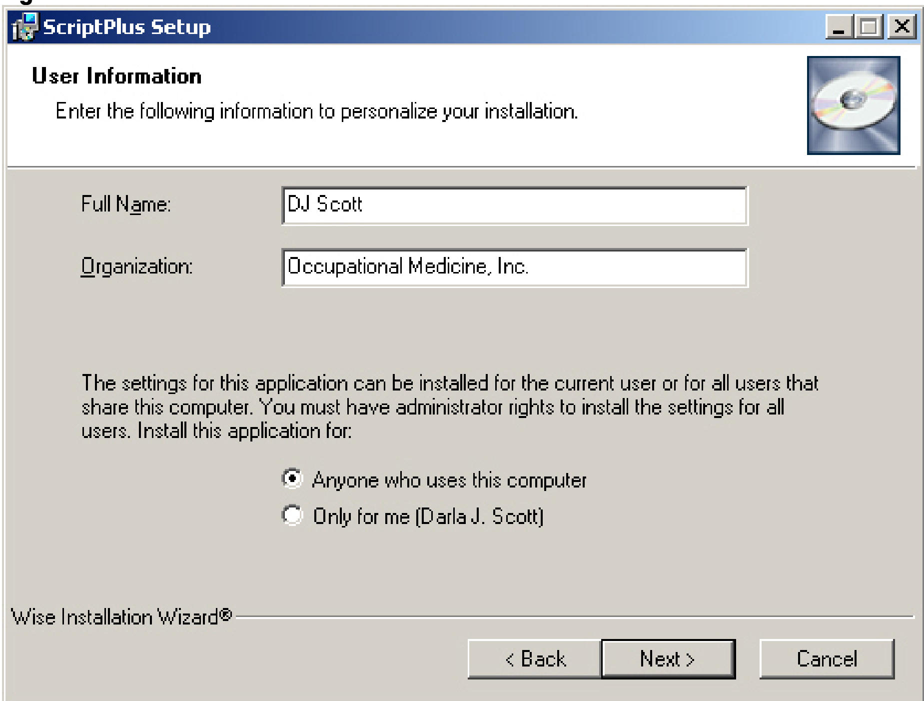
Install ScriptPlus

1. Insert the ScriptPlus CD in the CD-ROM drive. If the Setup Installation Wizard does not begin automatically, click **Start**, click **Run**, and then browse to and double-click the **ScriptPlus.exe** file in the CD-ROM directory.
2. When you have read the information on the Installation Wizard screen (see Figure 1-1), click **Next>** .

Figure 1-1: Setup Installation Wizard

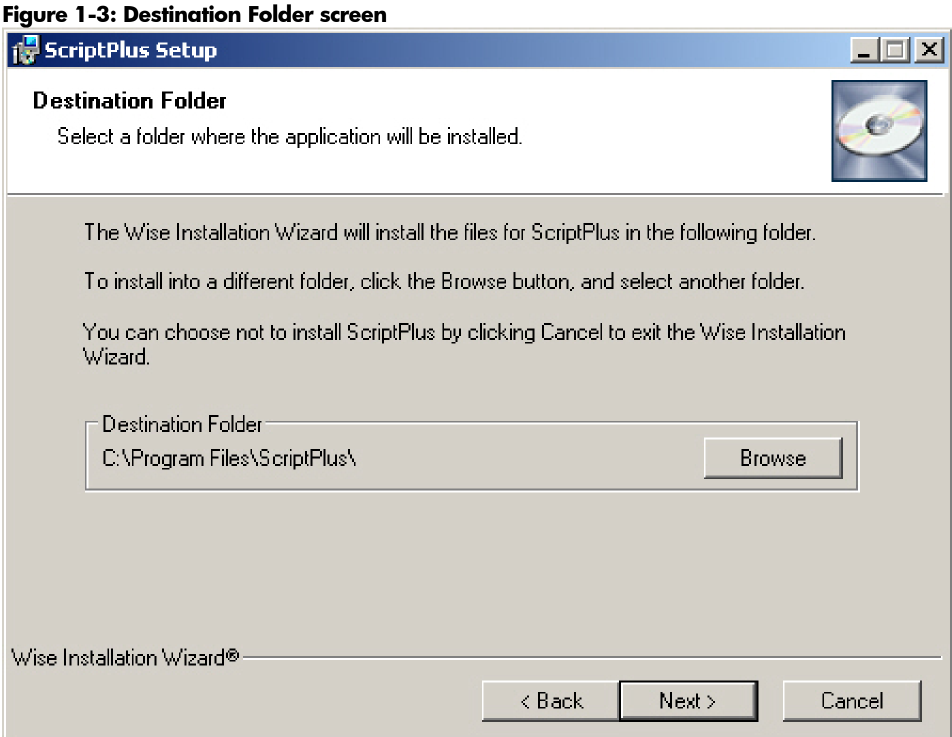
3. Personalize your ScriptPlus program by completing the information fields in the User Information screen (see Figure 1-2).

Figure 1-2: User Information screen



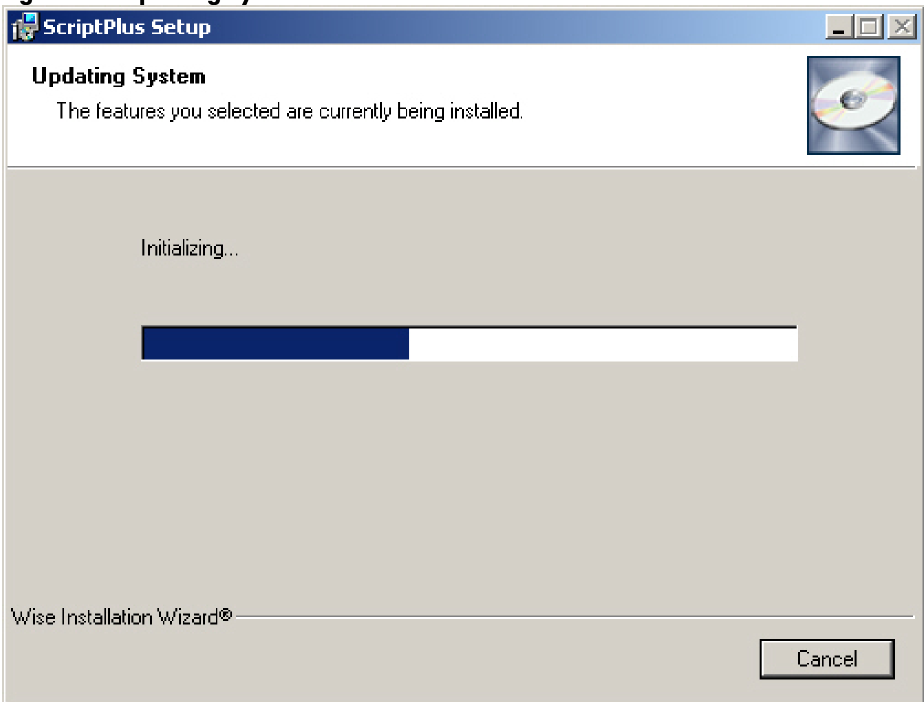
4. In the Destination Folder screen, accept the default destination (recommended) or click **Browse** to select a different destination (see Figure 1-3).

Figure 1-3: Destination Folder screen



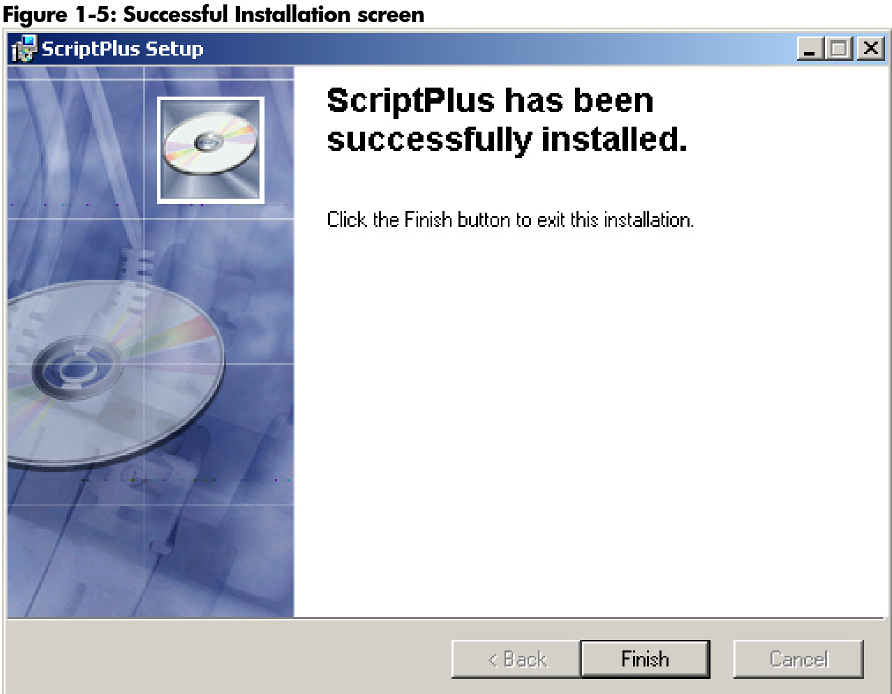
5. As the ScriptPlus files are installed, the Updating System screen will indicate the installation progress (see Figure 1-4).

Figure 1-4: Updating System screen



6. When the installation is complete, click **Finish** on the Success screen (see Figure 1-5).

Figure 1-5: Successful Installation screen

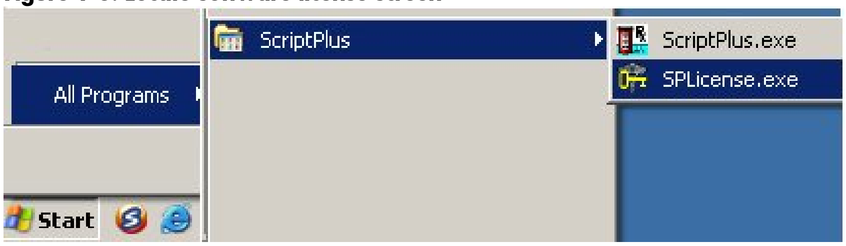


License ScriptPlus

To begin using ScriptPlus, you must first complete the software license information.

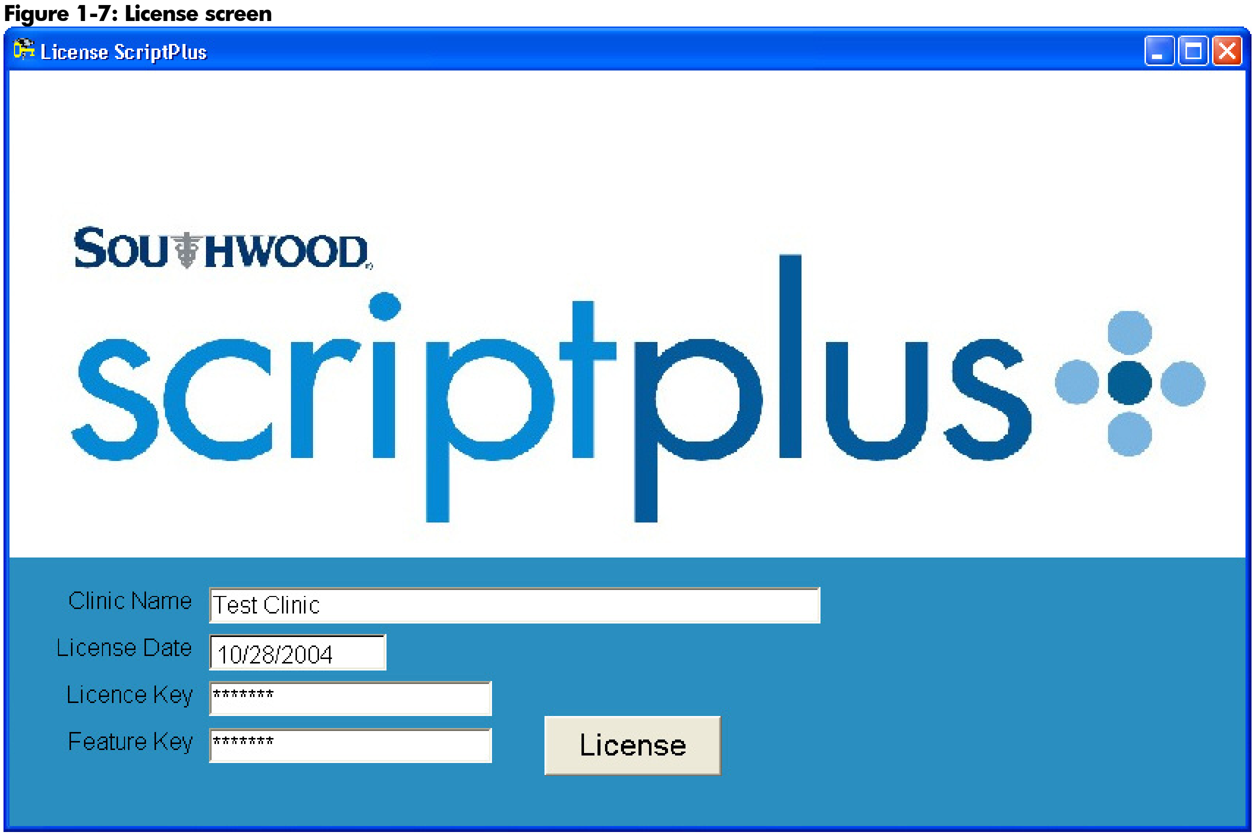
1. Click the Windows **Start** icon.
2. Select All Programs.
3. Select ScriptPlus.
4. Select **SPLicense.exe** (see Figure 1-6).

Figure 1-6: Locate software license screen



5. Complete the information fields in the License screen (see Figure 1-7).

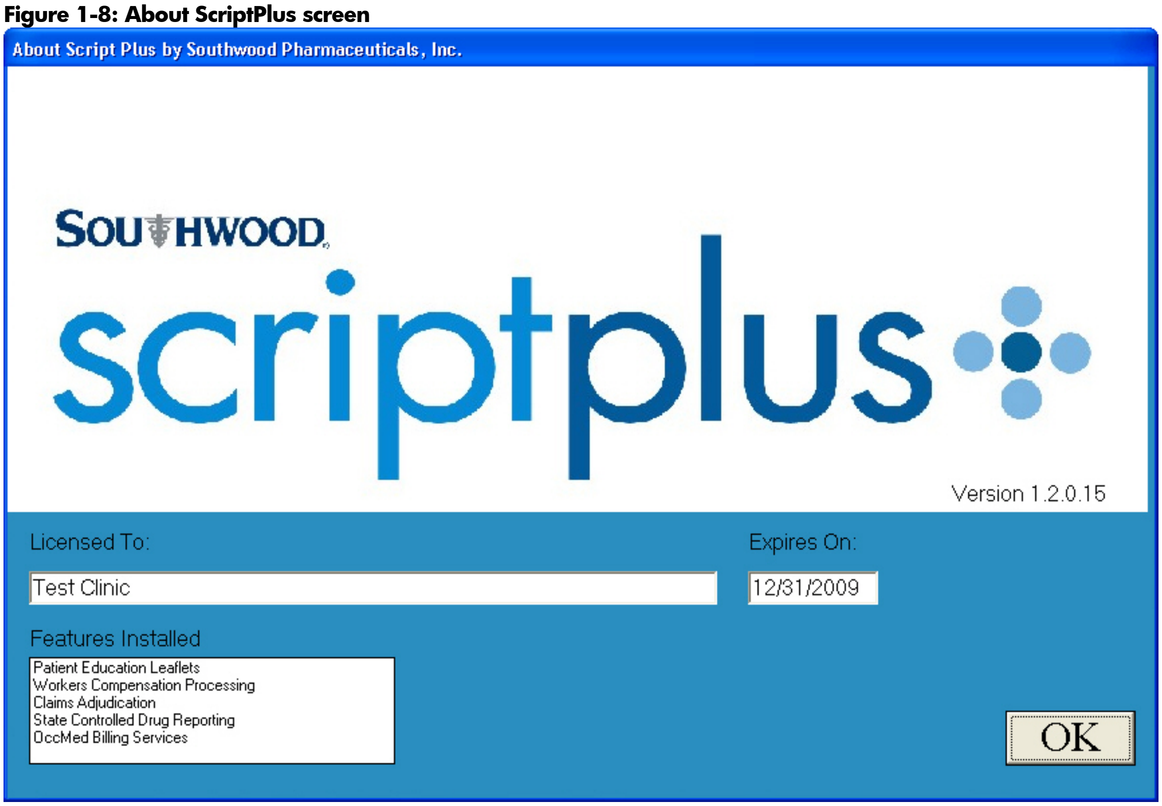
Figure 1-7: License screen



- **Clinic Name** – Type the name of your clinic
- **License Date** – Type the license date.
- **License Key** – Type the License Key provided with your ScriptPlus software. As you type the License Key, the License button will display on the screen.
- **Feature Key** – Type the Feature Key purchased with your ScriptPlus software. The Feature key determines the number of ScriptPlus features available to you.

6. When you have completed the license information, click **License**.
7. The About ScriptPlus screen verifies that your application is licensed, and lists the ScriptPlus Features you have purchased. Click **OK** to begin using ScriptPlus (see Figure 1-8).

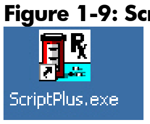
Figure 1-8: About ScriptPlus screen



The ScriptPlus Desktop Icon

The ScriptPlus icon will be installed on your desktop (see Figure 1-9). You can begin ScriptPlus by clicking the desktop icon.

Figure 1-9: ScriptPlus icon

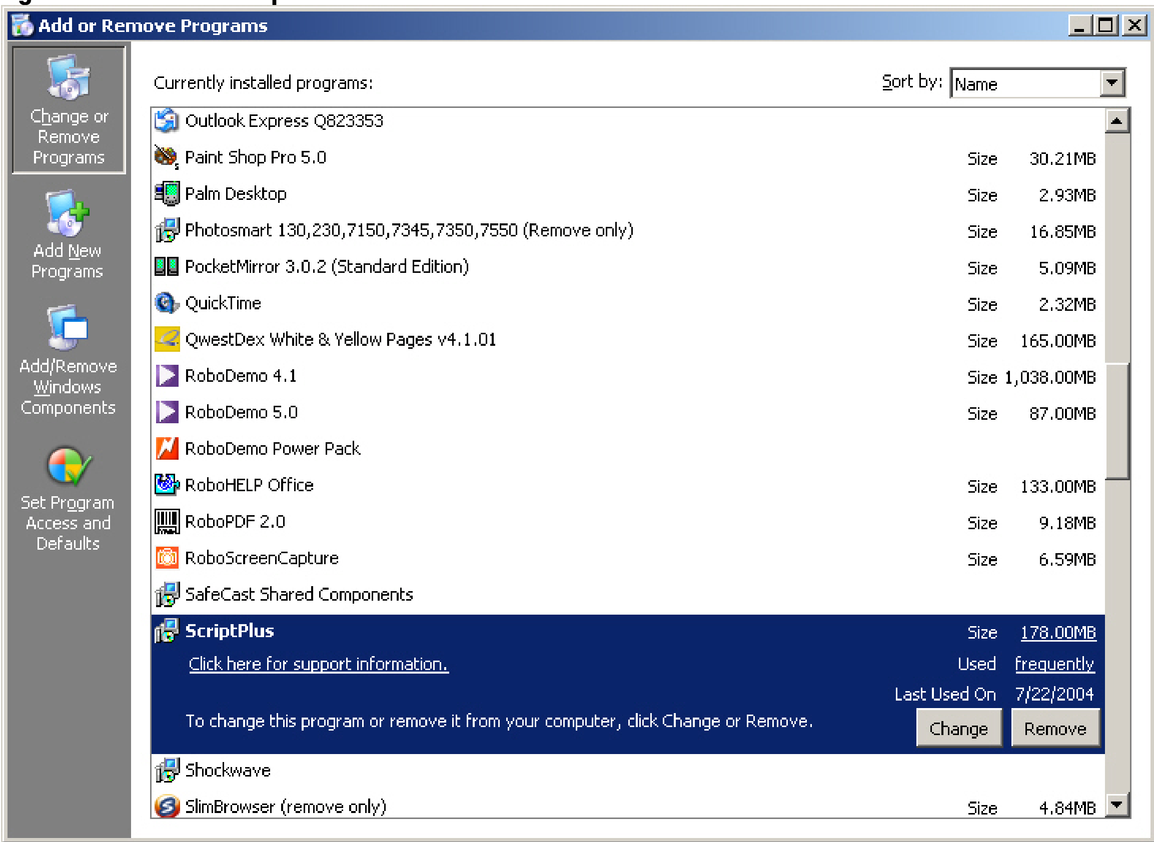


Uninstall ScriptPlus

To uninstall ScriptPlus, use the Windows® Add or Remove Programs feature:

1. Click the Windows **Start** button.
2. Select Control Panel.
3. Select Add or Remove Programs.
4. Navigate to the ScriptPlus program icon and select the file.
5. Click **Remove** to uninstall the program (see Figure 1-10).

Figure 1-10: Uninstall ScriptPlus



Chapter 2

The System Menu

This chapter will provide an overview of the ScriptPlus System Menu functions.

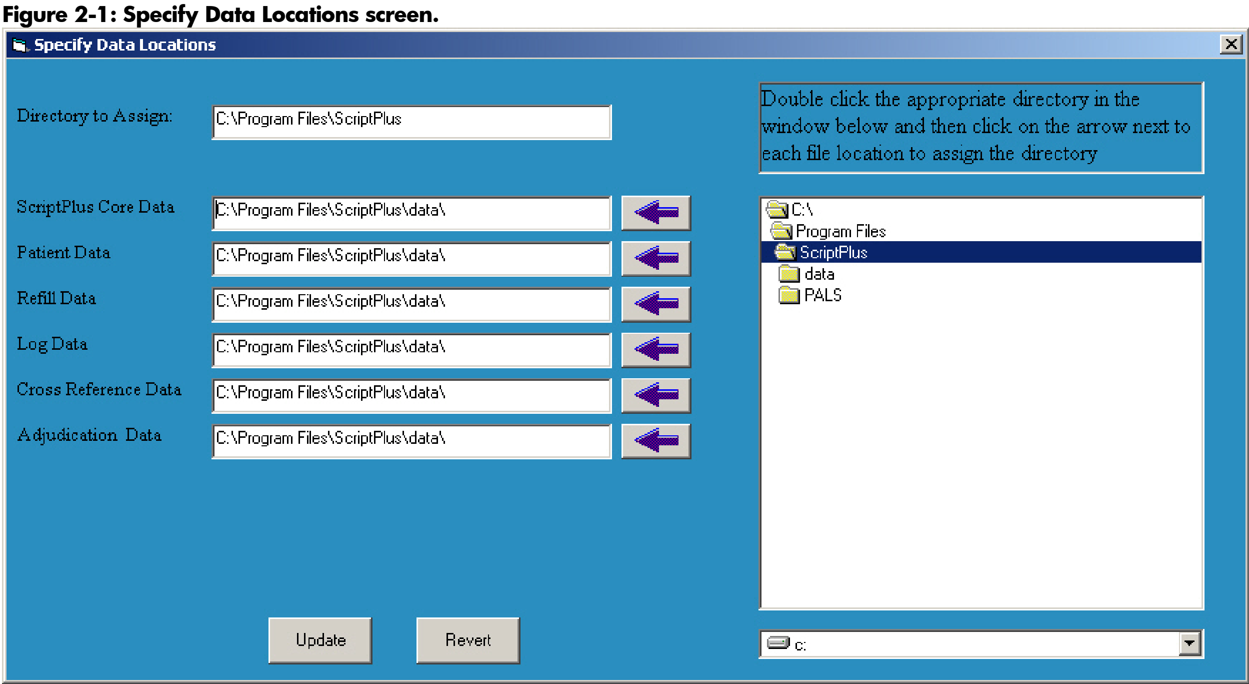
The System menu contains the tools for setting up and maintaining your ScriptPlus operating environment and functions:

- Database Locations
- System Setup
- User Maintenance

Database Locations

ScriptPlus data uses several different database files to store information. Each file may reside in a different location, but under most circumstances, there is no need to move data files from their default location. Figure 2-1 shows the Specify Data Locations screen.

Figure 2-1: Specify Data Locations screen.



To change data locations

If it is necessary to change file locations, use the following steps:

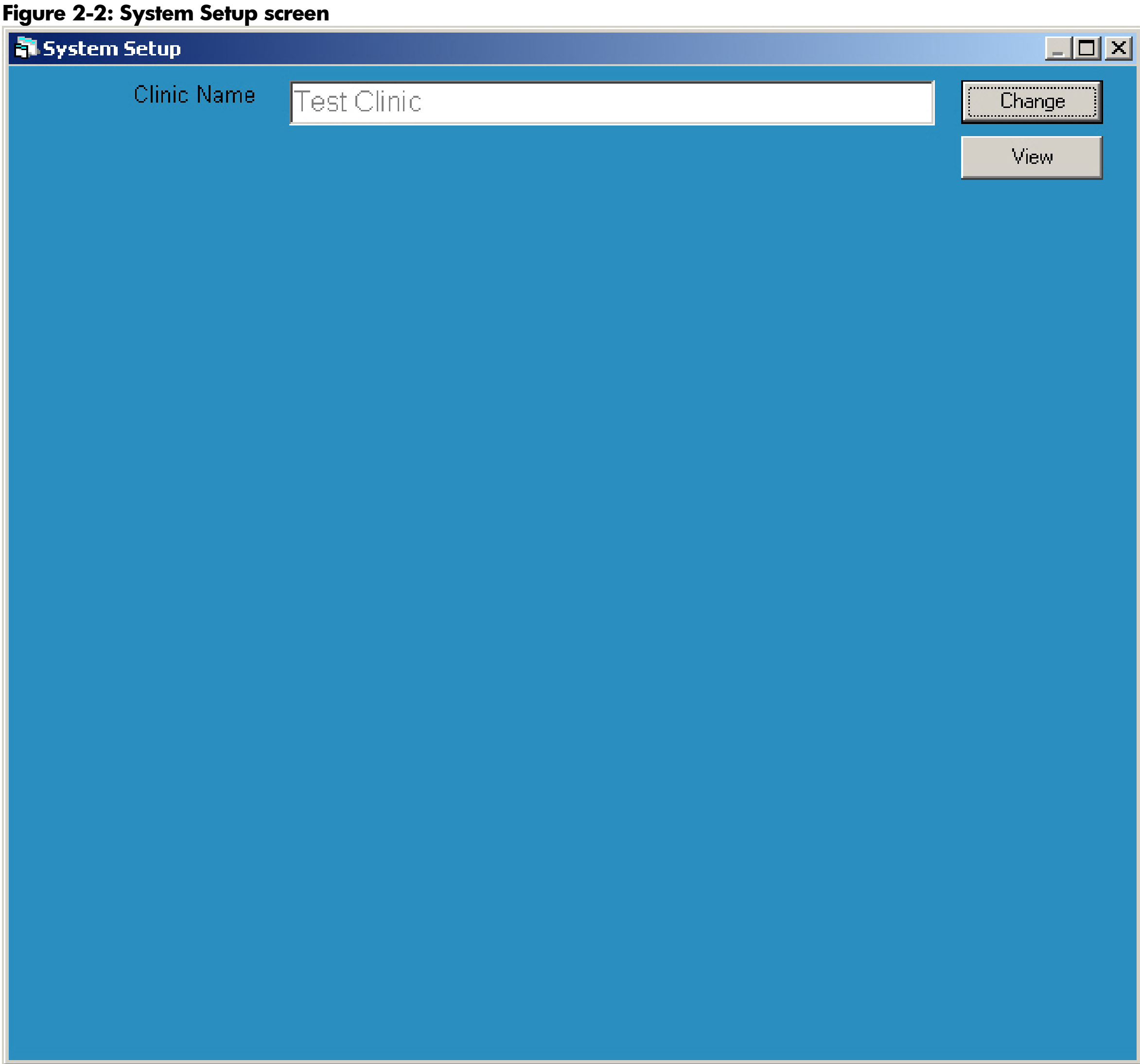
Note: Always perform a backup of your ScriptPlus database before moving database files!

1. Shut down the ScriptPlus software.
2. Move the data files to the new location.
3. Start the ScriptPlus software. You will be prompted to enter new data locations.
4. Use the Directory window in the Specify Data Location screen (see Figure 2-1) to select the new directory.
5. Click the arrow next to each database field to assign the new data location to that database.
6. Click **Update** to save changes.

System Setup

The System Setup screen allows you to customize your ScriptPlus environment (see figure 2-2).

Figure 2-2: System Setup screen



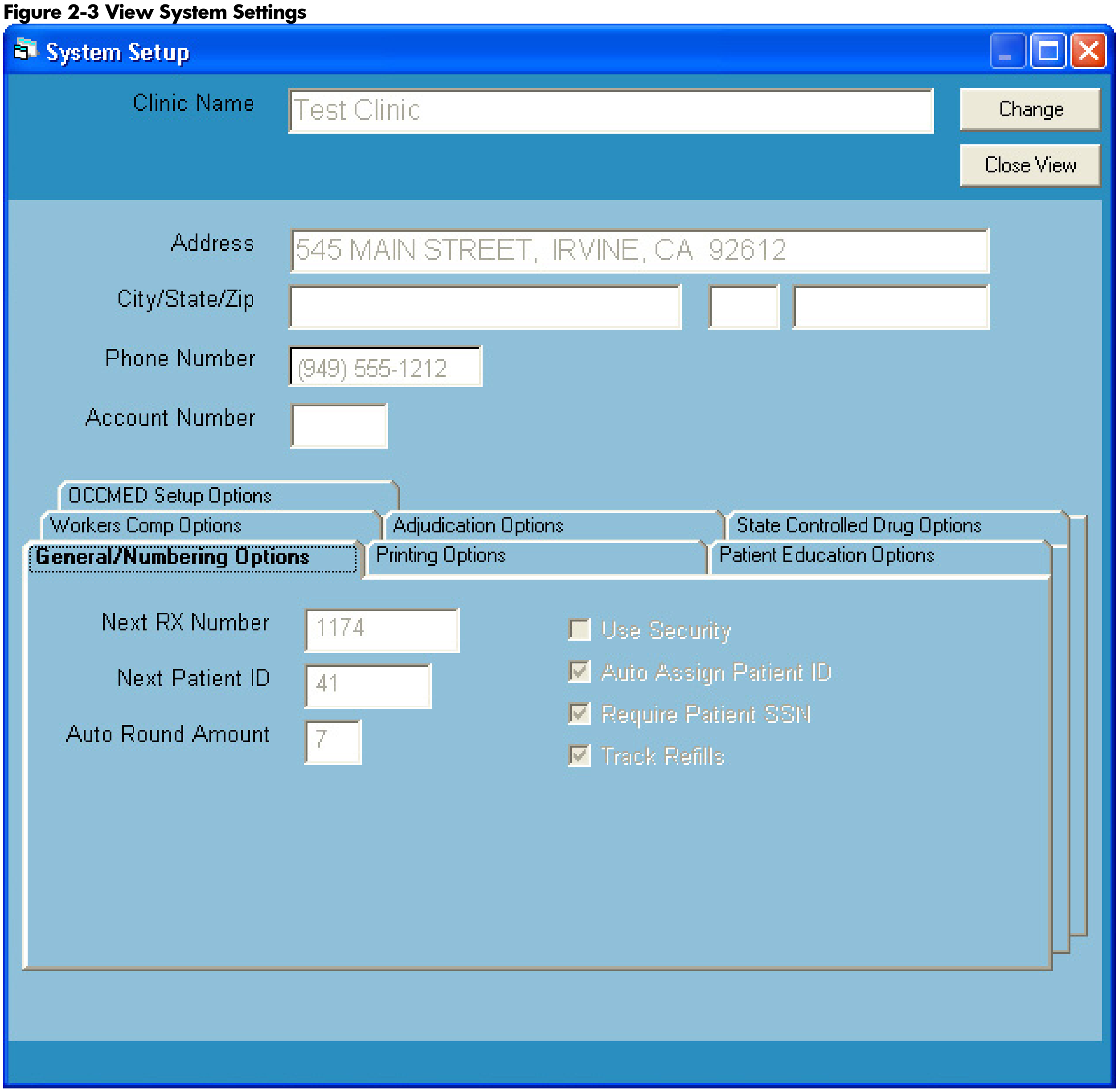
The System Setup screen displays your licensed clinic name, and offers two functions:

- Change
- View

Select **View** to see the current system setup (see Figure 2-3).

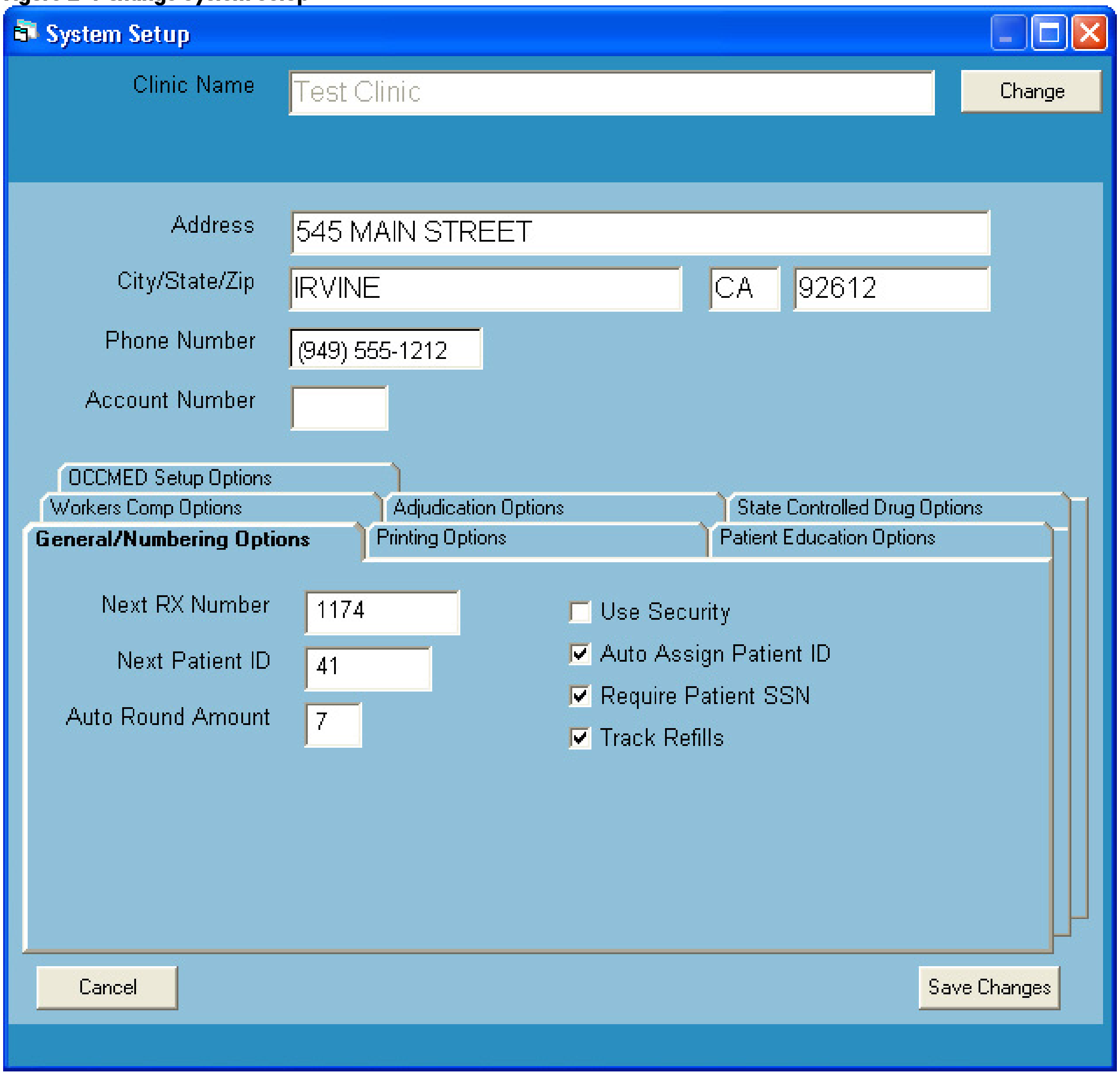
Note: Settings cannot be changed while in View mode.

Figure 2-3 View System Settings



From the View screen, or from the main System Setup screen, select **Change** to make changes to your System Setup (see Figure 2-4).

Figure 2-4 Change System Setup



Complete the fields in the tabbed sections of the System Setup screen to customize your ScriptPlus working environment:

Clinic Name

The Clinic Name field contains the Clinic Name used during licensing, and it may only be changed as part of the licensing process. If it is necessary to change the Clinic Name, contact Southwood Pharmaceuticals for licensing information.

Address

Type the complete clinic address—street, city, state, and zip code—in the Address field. This address will be printed on the dispensing label.

Phone number

Type the primary clinic telephone number in the Phone Number field. This phone number will be printed on the dispensing label.

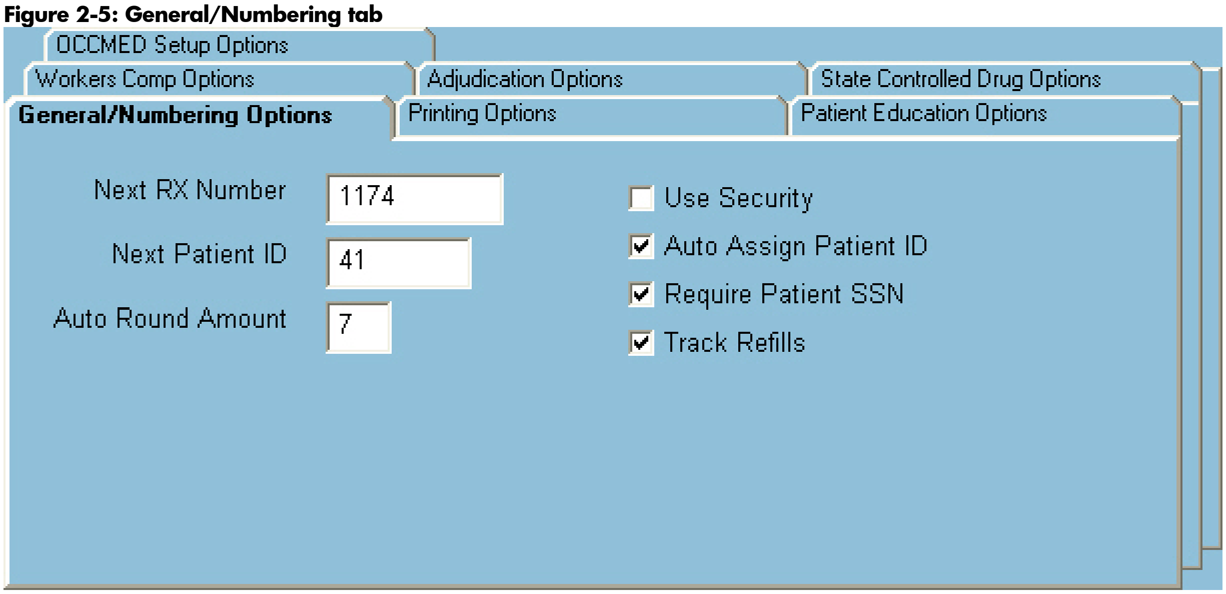
Account number

Type the clinic's SWP customer number in the Account Number field. This number will be included with all electronic or faxed orders, identifying the clinic order.

Note: Your SWP customer number is located on your invoices or packing lists. Contact SWP or your sales representative if you are unsure of your Account number.

General/Numbering tab

Figure 2-5: General/Numbering tab



Next RX Number

Each dispensed product is required by law to have a unique RX number. The Next RX Number field allows you to specify the starting number value; once this number is set, it should not be changed.

Next Patient ID

Based on the **Auto Assign Patient ID** option (offered later in the form), the system will either assign a patient ID or allow the user to assign one. If Auto Assign is selected, this number is used as a starting value for assigning patient IDs. Each new patient causes this number to increase.

Auto Round Amount

The ScriptPlus Auto Round feature allows you to specify a rounded value for product order quantities, to assist in inventory maintenance.

For example, you may set the Auto Round value to 5. If you complete a purchase order for a quantity of 14, the actual order quantity will be changed to 15. If you complete a purchase order for a quantity of 17, the actual order quantity will be changed to 20. A purchase order with a quantity of 25 would not be auto-rounded.

Use Security

Check this box to set user security levels. When security is on, each user must log in for access. See User Maintenance for more information on Security.

NOTE: Be sure to set up at least one valid user before turning on the Use Security feature.

Auto Assign Patient ID

Check this box to automatically assign a unique patient identification number when a new patient is added to the database. This number does not affect imported patient records.

Require Patient SSN

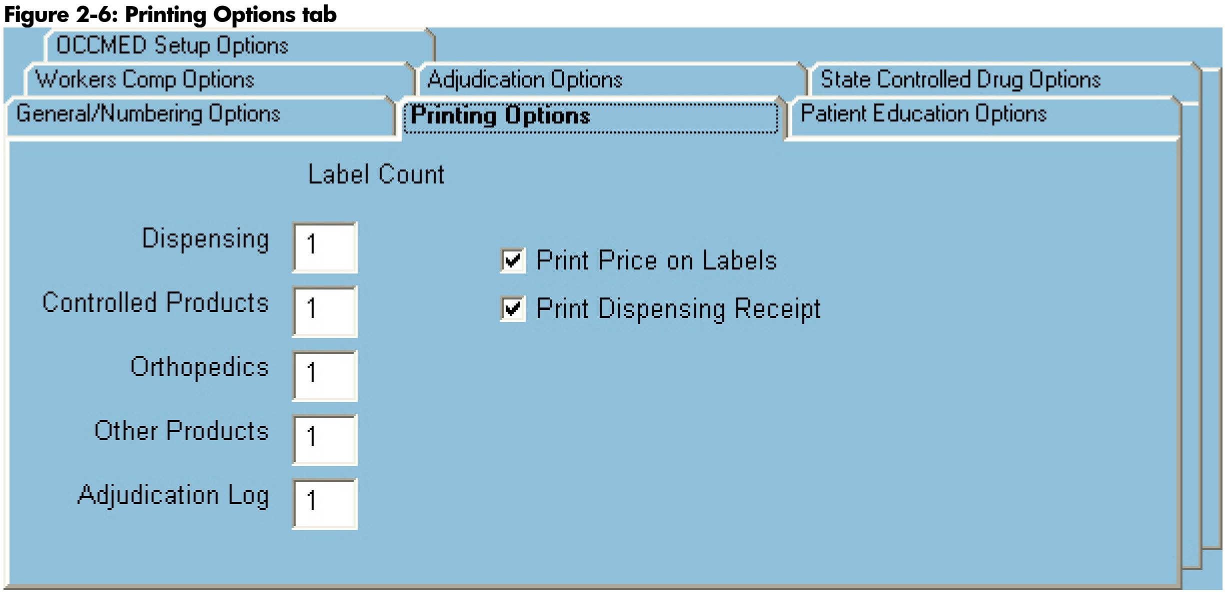
A patient social security number (SSN) is required for Workers Compensation claims. Check this box to have the system check for a SSN during new patient entry.

Track Refills

Check this box to track refill orders within the system.

Printing Options

Figure 2-6: Printing Options tab



Label Count fields

Values typed in each of the label count fields determine the total number of labels to be printed for each of the different types of dispensed products. For example, if you type 2 in the Dispensing field and select a quantity of 3 bottles to dispense, then 6 labels will be printed. The Label Count fields include:

- **Dispensing** – Labels printed for medications dispensed
- **Controlled Products** – Extra labels are printed for DEA controlled drugs reporting
- **Orthopedics** – Labels printed for orthopedic inventory
- **Other Products** – Labels printed for inventory control
- **Adjudication Log** – Labels printed for successfully adjudicated medications. This label is in addition to Dispensing and Controlled Product labels.

Print Price on Labels

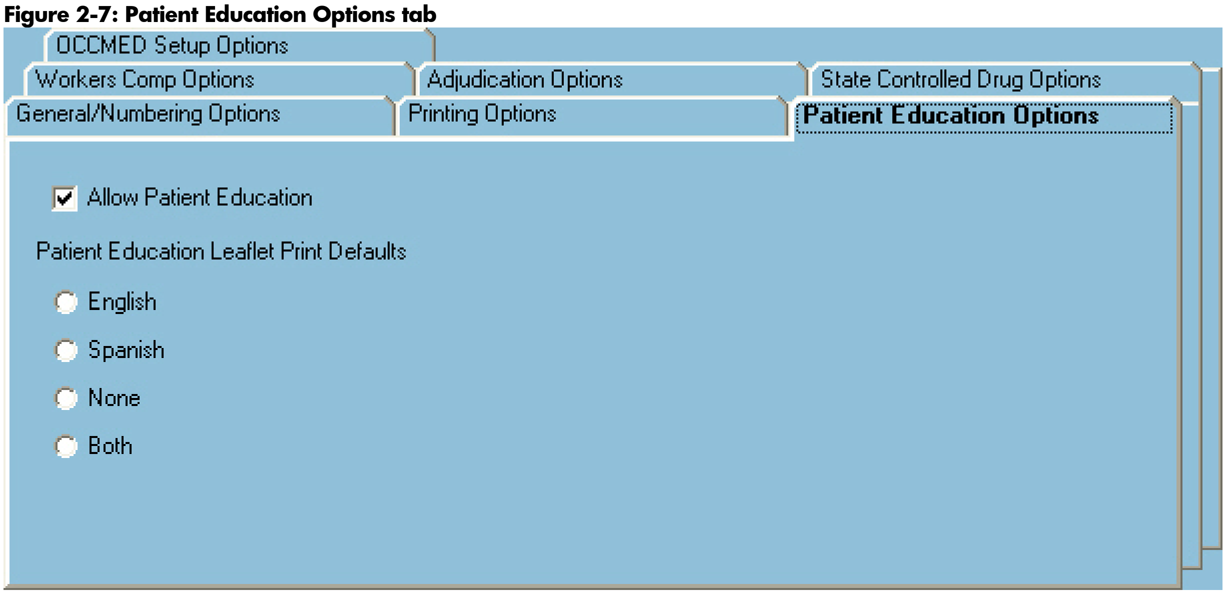
Check this box to print the actual price of dispensed medication on the dispensing label, in cash transactions.

Print Dispensing Receipt

Check this box to print a dispensing receipt.

Patient Education Options tab

Figure 2-7: Patient Education Options tab



Allow Patient Education

Select this box to allow printing of Patient Education Leaflets (PELs)

Patient Education Leaflet Print Defaults

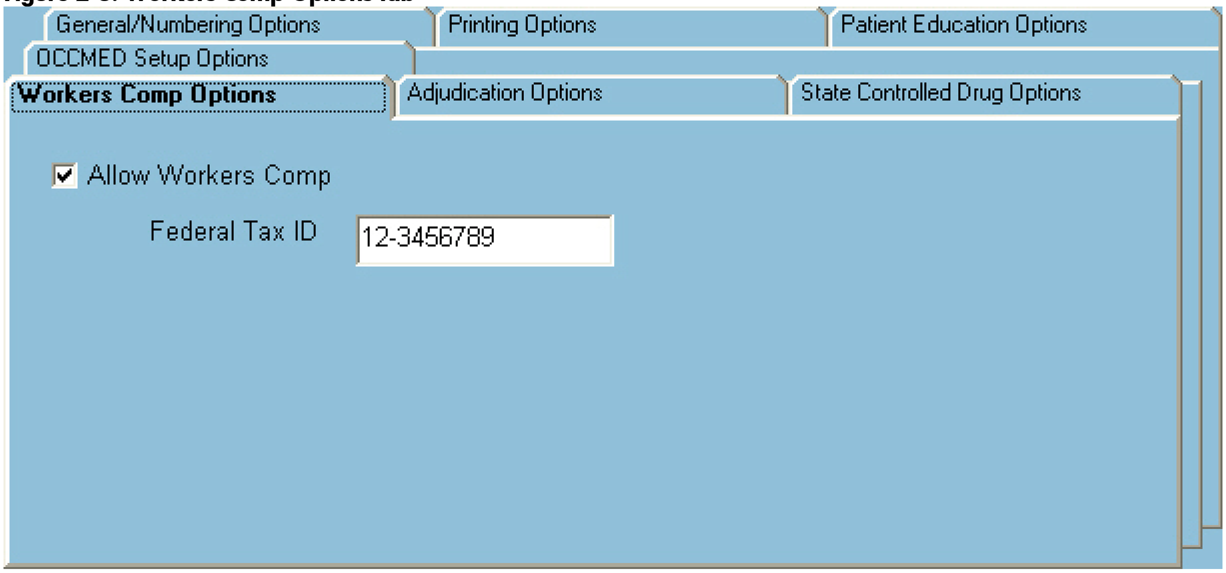
Select a default option for printing Patient Education leaflets when medication is dispensed. The default options are:

- **Spanish** – PELs will print in Spanish.
- **English** – PELs will print in English
- **None** – No PELs will print
- **Both** – PELs will print in both English and Spanish.

Note: You will have the option of overriding the default PEL setting when dispensing medications.

Workers Comp Options tab

Figure 2-8: Workers Comp Options tab



Allow Workers Comp

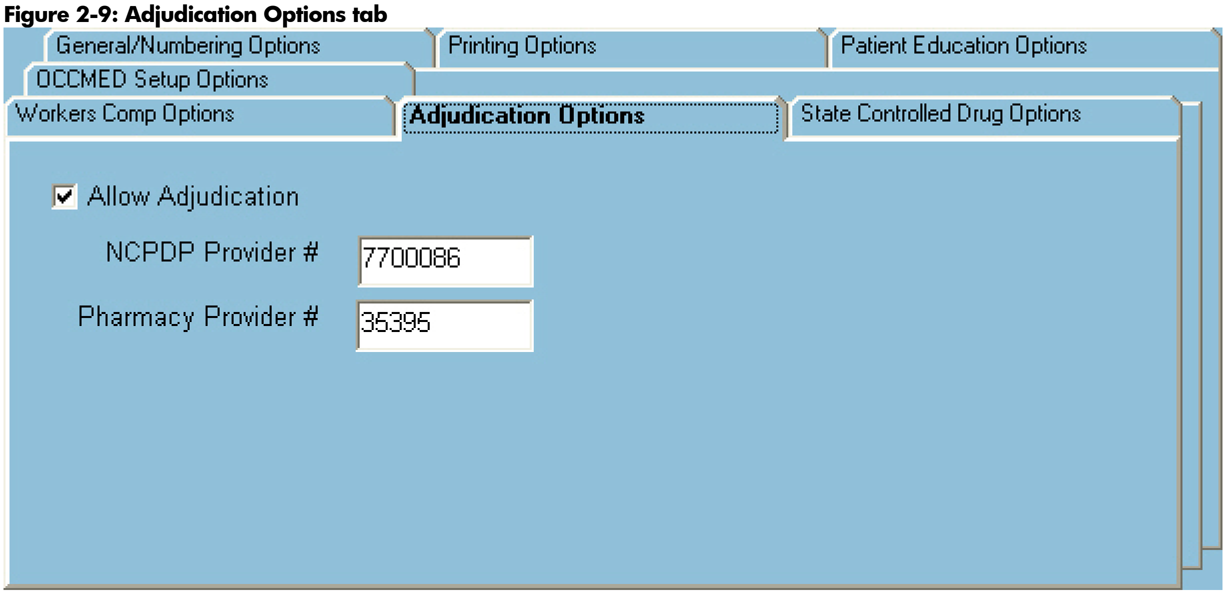
Check this box if you dispense to patients for Workers Compensation claims. When this feature is selected, ScriptPlus functions specific to Workers Compensation become available in the menus and forms.

Federal Tax ID

Type the clinic's Federal Tax ID in this field. This Federal Tax ID will print on the HCFA billing forms (CMS-1500) FOR Workers Comp claims.

Adjudication Options tab

Figure 2-9: Adjudication Options tab



Allow Adjudication

Check this box to allow Adjudication functions.

NCPDP Provider ID

The NCPDP Provider ID is assigned by the NCPDP as part of the adjudication process. (See Adjudication appendix for more information)

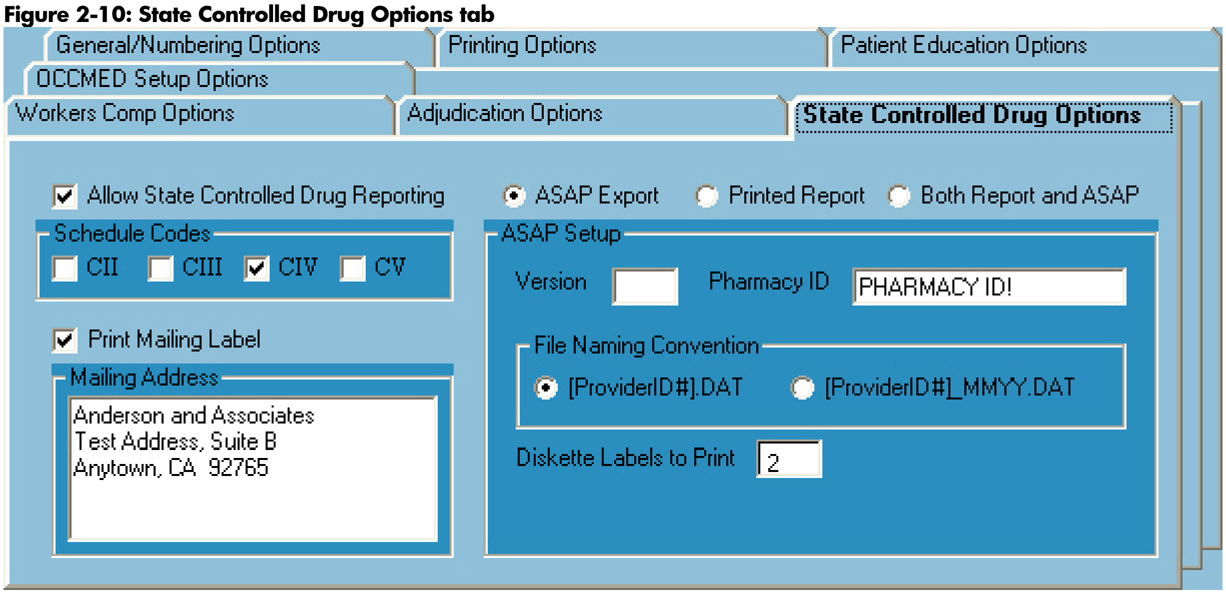
Pharmacy Provider ID

The Pharmacy Provider ID is assigned by the NCPDP as part of the adjudication process. (See Adjudication appendix for more information)

State Controlled Drug Options tab

The State Controlled Drug Options tab allows you to set up export files for reporting controlled drug dispensing reports required by some states. Also see State Controlled Drug Export.

Figure 2-10: State Controlled Drug Options tab



Allow State Controlled Drug Reporting

Select this box if your clinic is required to report controlled drug dispensing to a state agency.

Schedule Codes

Select the control codes for which reporting is required.

Print Mailing Label

Select this box to generate a mailing label for your reports, and complete the report mailing address in the Mailing Address field provided.

Reporting options

Select the type of report to generate:

- **ASAP Export** – Export to American Society for Automation in Pharmacy (ASAP) reporting program (see ASAP Setup)
- **Printed Report** – Generates a printed report, only.

- **Both Report and ASAP** – Generates a printed report and ASAP reporting

ASAP Setup

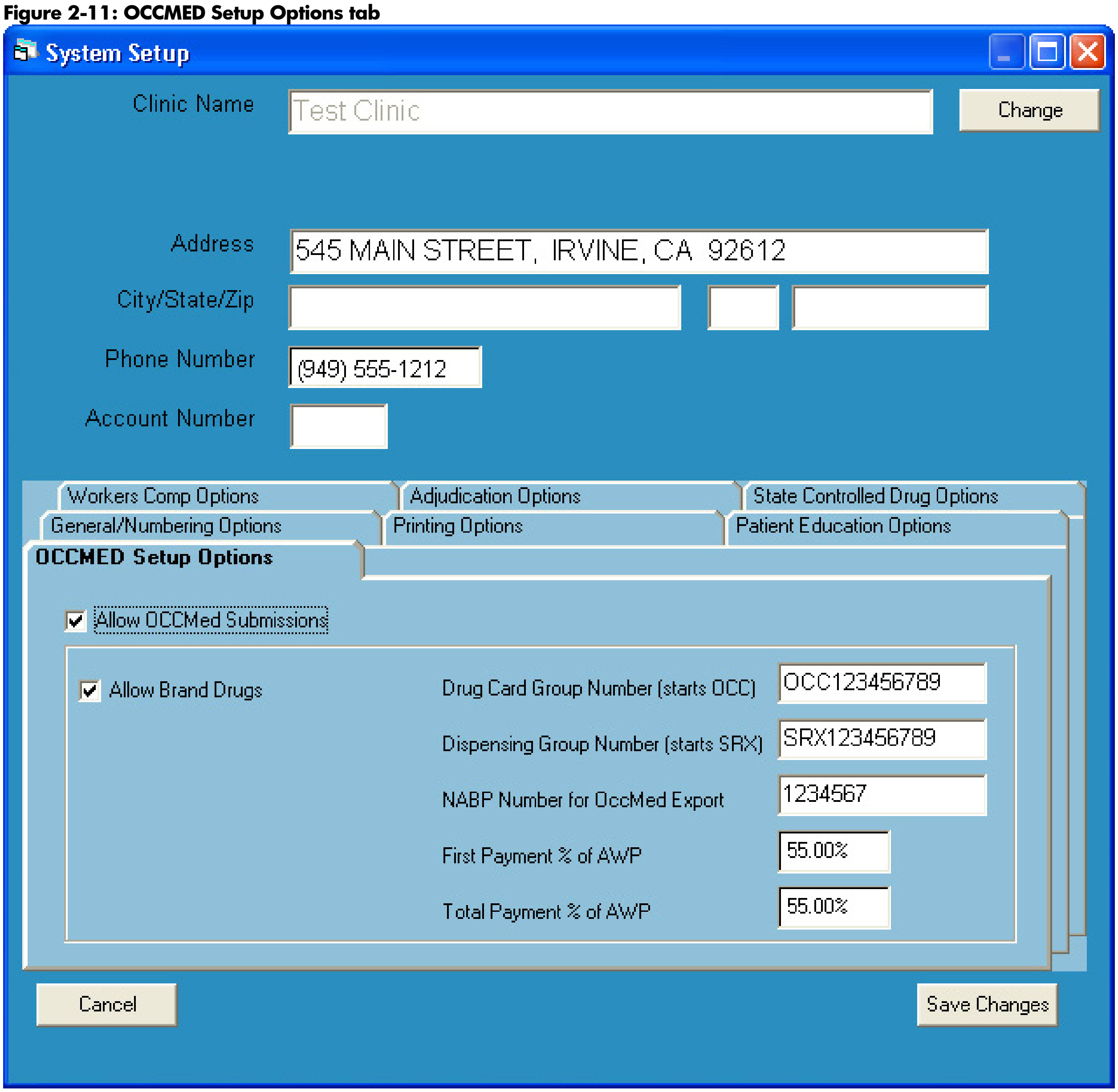
Complete the ASAP Setup fields according to your state's requirements. Check your ASAP program documentation for required information.

When you have completed all of the fields in the System Setup, click **Save Changes**.

OCCMED Setup Options tab

If your clinic submits reimbursement claims to OCCMed, select the **Allow OCCMed Submission** box. Then, complete the fields with the information provided by OCCMed.

Figure 2-11: OCCMED Setup Options tab

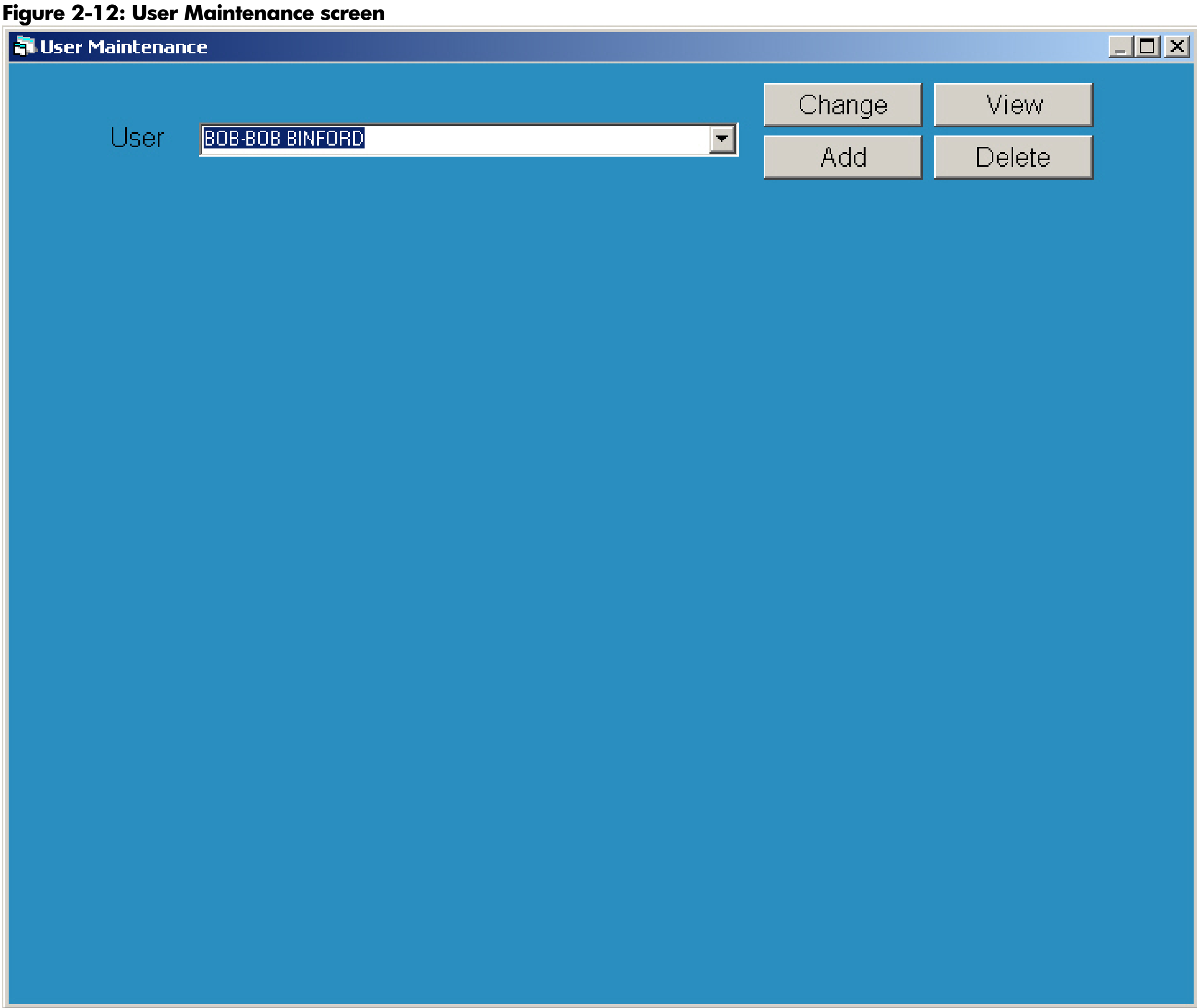


User Maintenance

The User Maintenance screen is used to set up individual user accounts in ScriptPlus. The main User Maintenance screen contains a drop-down list of system users, and offers four functions (see Figure 2-12):

- **Change** – to change user information
- **Add** – to add a new user
- **View** – to view user authorizations
- **Delete** – to delete a system user

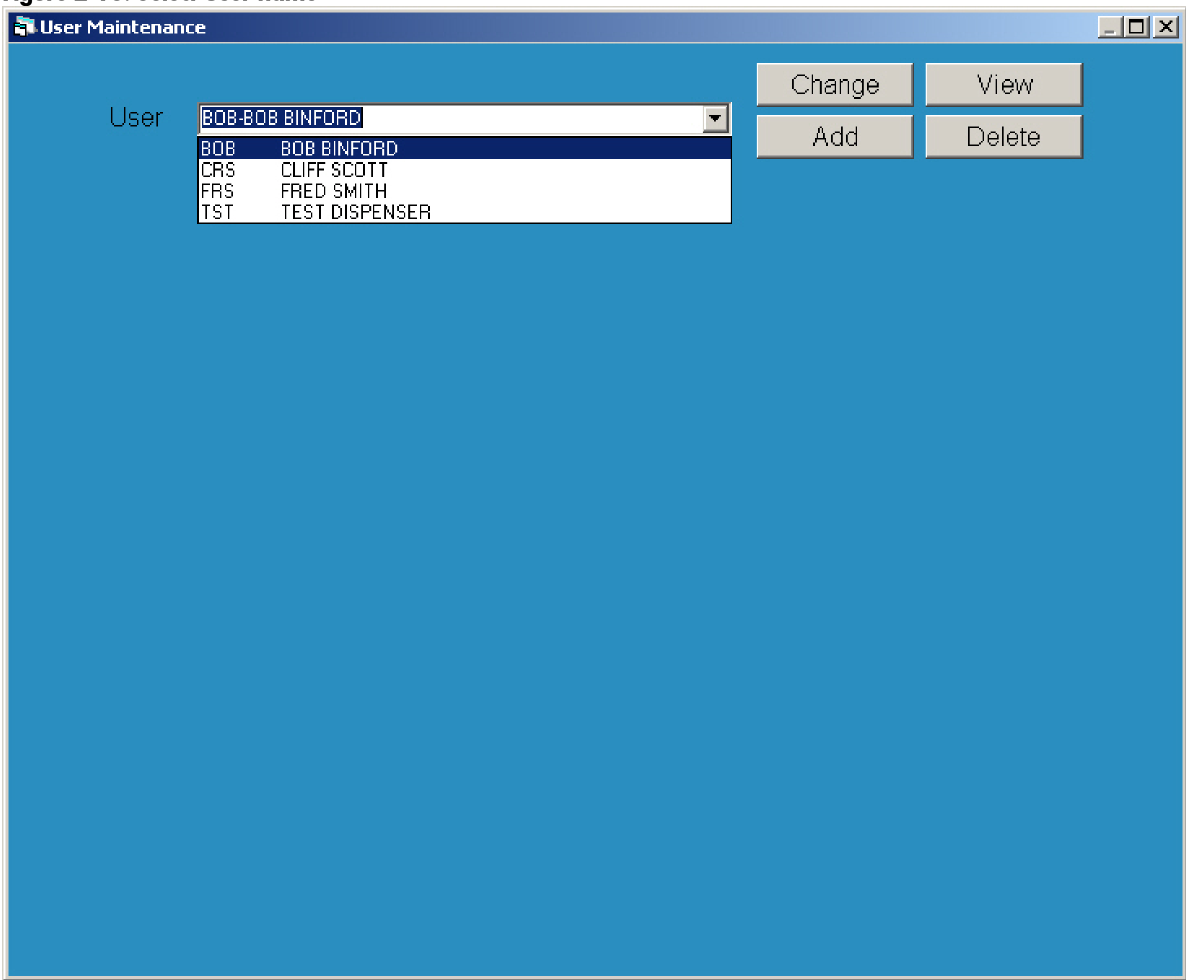
Figure 2-12: User Maintenance screen



Change, View, or Delete User Authorization

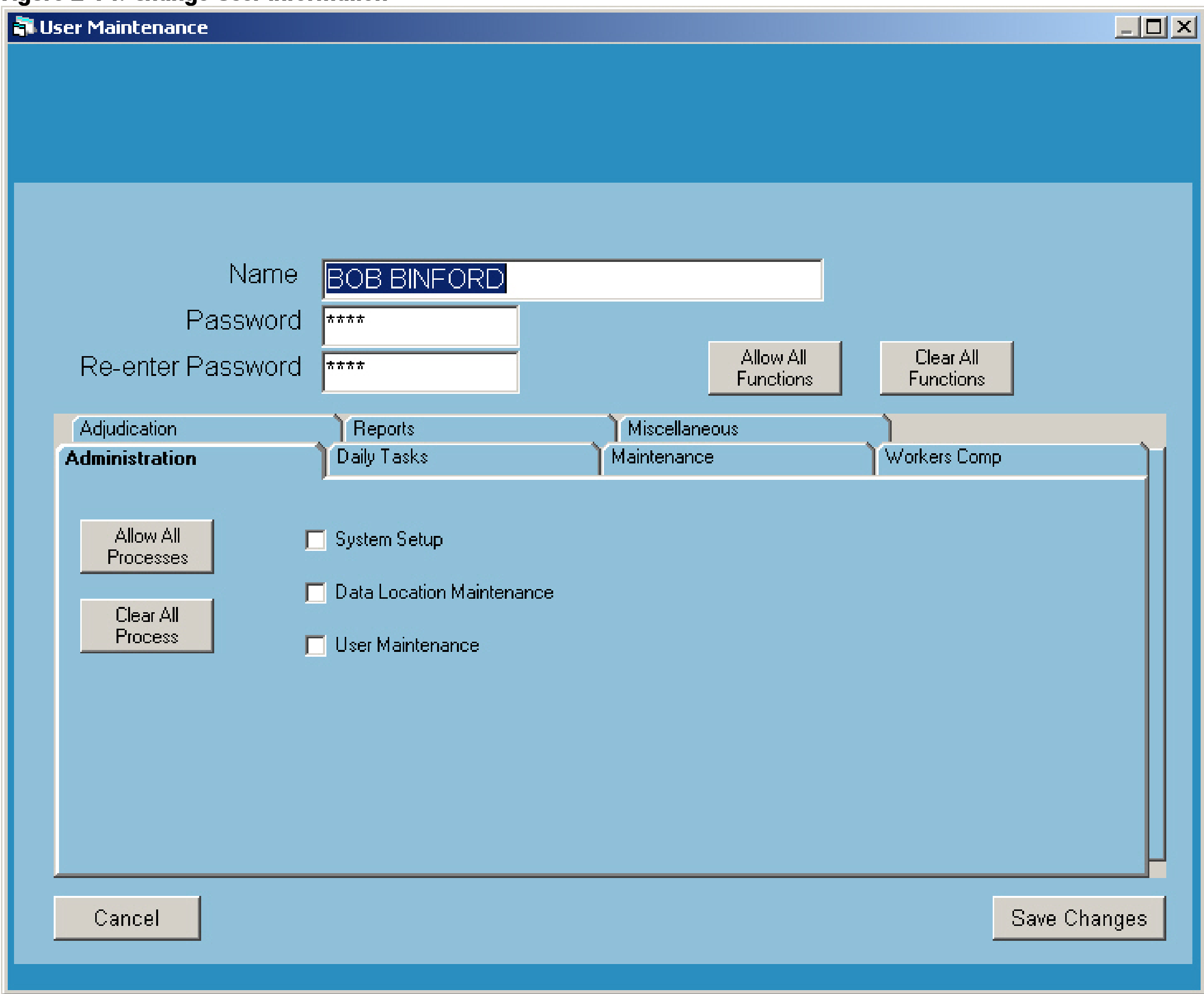
To change, view, or delete function authorization for an existing user, select the user name from the drop-down User list (see Figure 2-13). Then, click **Change, View, or Delete**.

Figure 2-13: Select User name



In the Change view, you can change the functions and processes the user is authorized to perform (see Figure 2-14).

Figure 2-14: Change User information



User Security Settings

When Use Security is selected in System Setup, each user must log in to use the ScriptPlus system (see Figure 2-15).

Figure 2-15 User Login

When user login is validated, the user will only have access to authorized processes and functions.

The User Maintenance View, Change, or Add screens contain tabbed sections that categorize specific program zones, and selections authorizing each ScriptPlus user to perform specific processes in each zone.

Note: User authorization determines the availability of system menu choices and information availability in the ScriptPlus system. For example, if a user is not authorized to dispense controlled medications, all controlled medications will be filtered from the list of medications available to be dispensed.

Allow/Clear All Functions

If the user is authorized to perform all system functions, click **Allow All Functions**. This will select each box in each process zone. To remove authorization for all functions, click **Clear All Functions**.

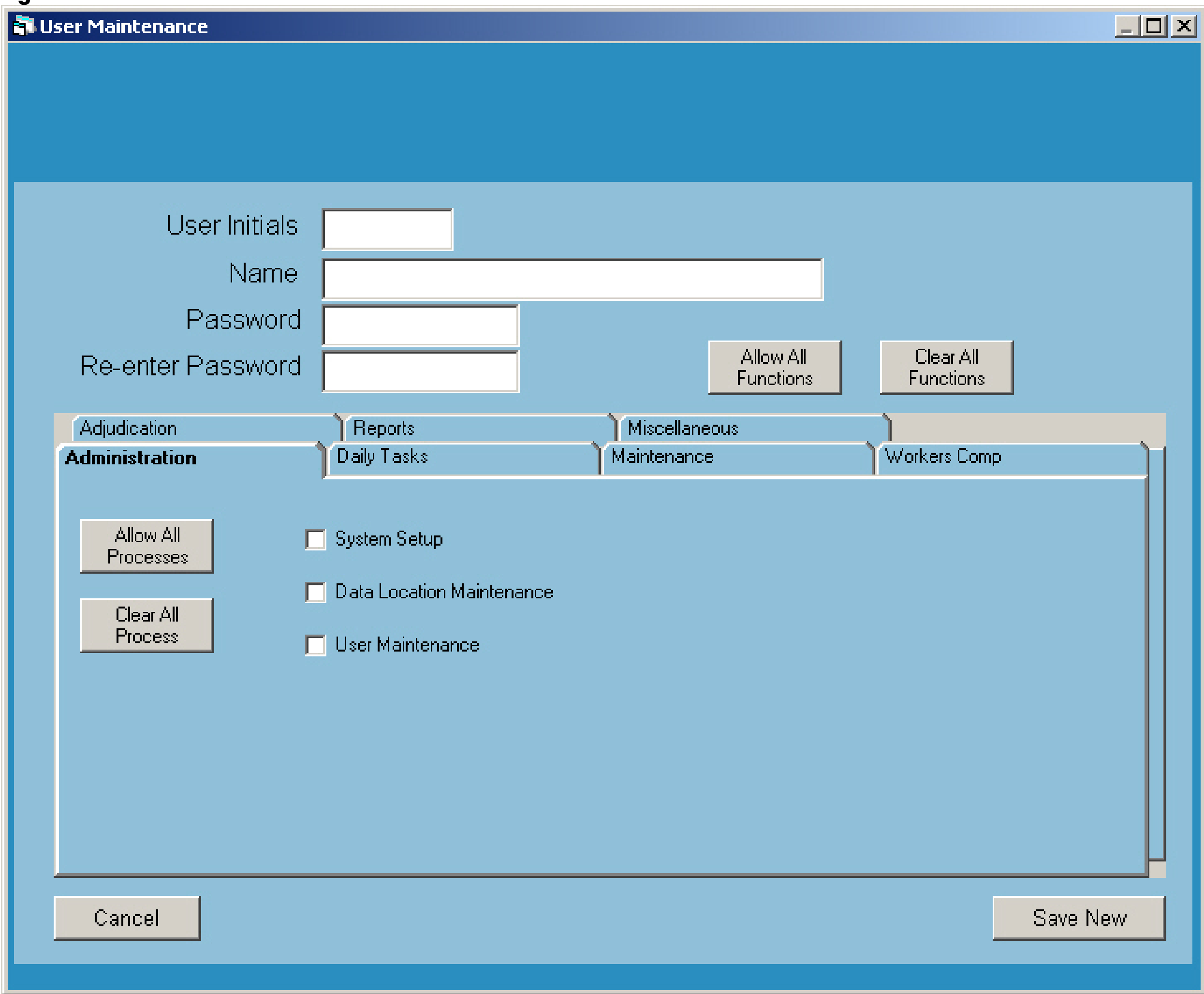
Allow/Clear All Processes

If the user is authorized to perform all processes within a tabbed process zone, click **Allow All Processes** in the zone. This will select each box in the process area. To remove authorization for all processes within a zone, click **Clear All Processes**.

Add a new user

1. To add a new ScriptPlus user, click **New** on the User Maintenance main screen.
2. Set the function and process capabilities for the new user by completing the information fields and check boxes provided. (see Figure 2-16).

Figure 2-16: Add a new user



Complete the new **User Initials**, **Name**, and **Password** fields in the top half of the screen.

Note: Each user must have unique 2- or 3-digit initials.

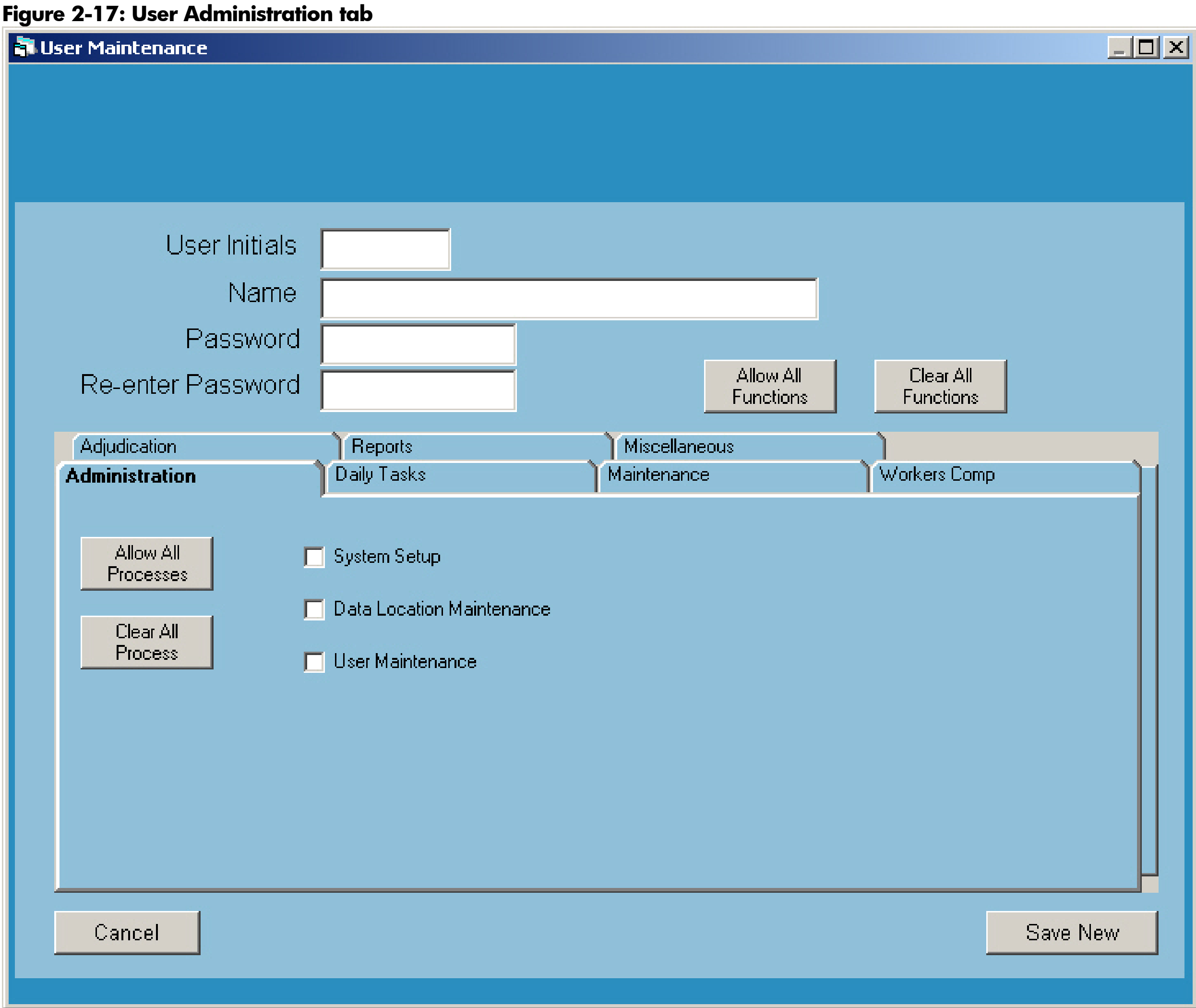
Administration tab

In the Administration tab, the user may be given authorization to perform the following processes (see Figure 2-17):

- System Setup
- Data Location Maintenance
- User Maintenance

When the desired authorization settings have been checked, click **Save New**.

Figure 2-17: User Administration tab



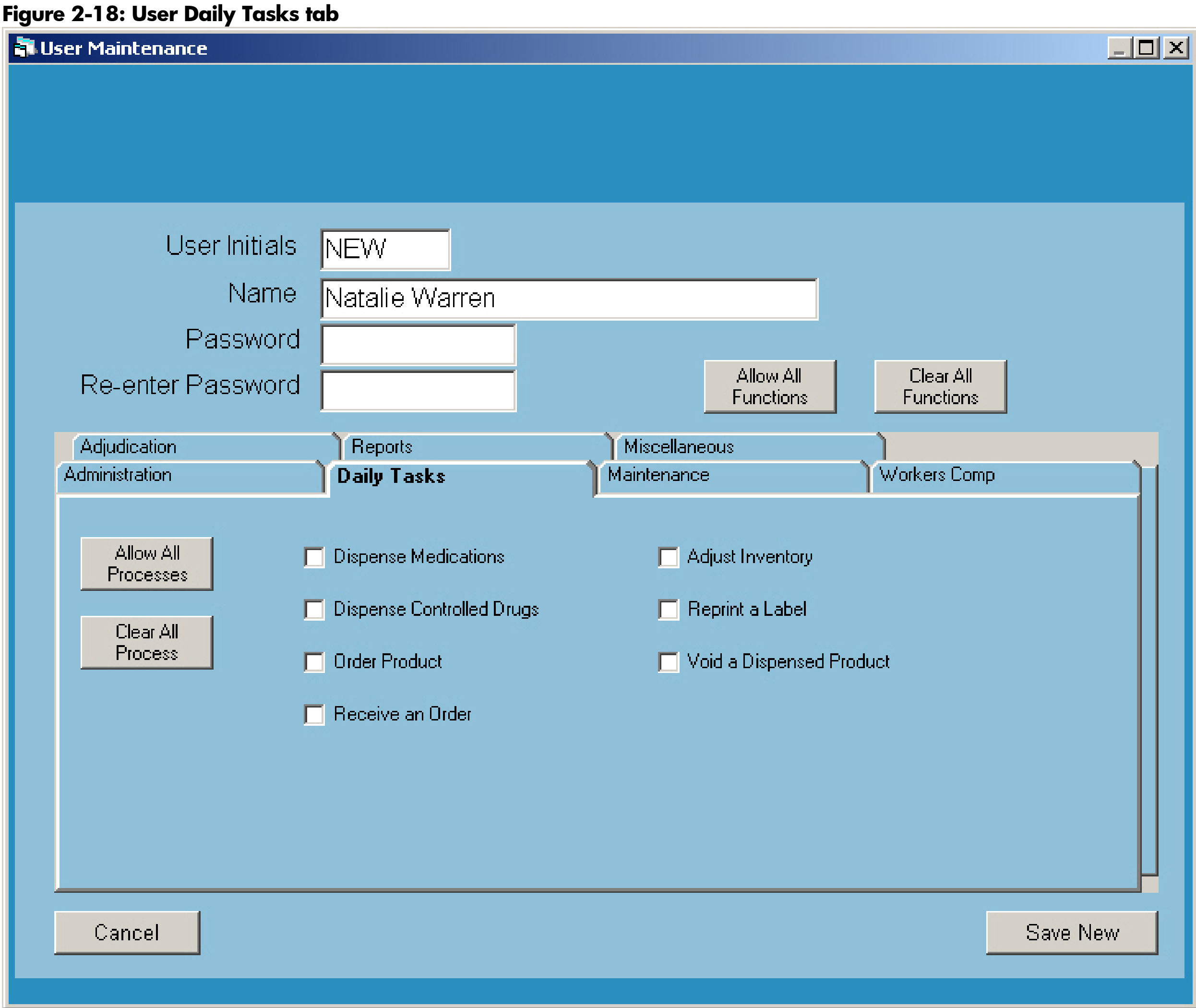
Daily Tasks tab

In the Daily Tasks tab, the user may be given authorization to perform the following processes (see Figure 2-18):

- Dispense Medications
- Dispense Controlled Drugs
- Order Product
- Receive an Order
- Adjust Inventory
- Reprint a Label
- Void a Dispensed Product

When the desired authorization settings have been checked, click **Save New**.

Figure 2-18: User Daily Tasks tab



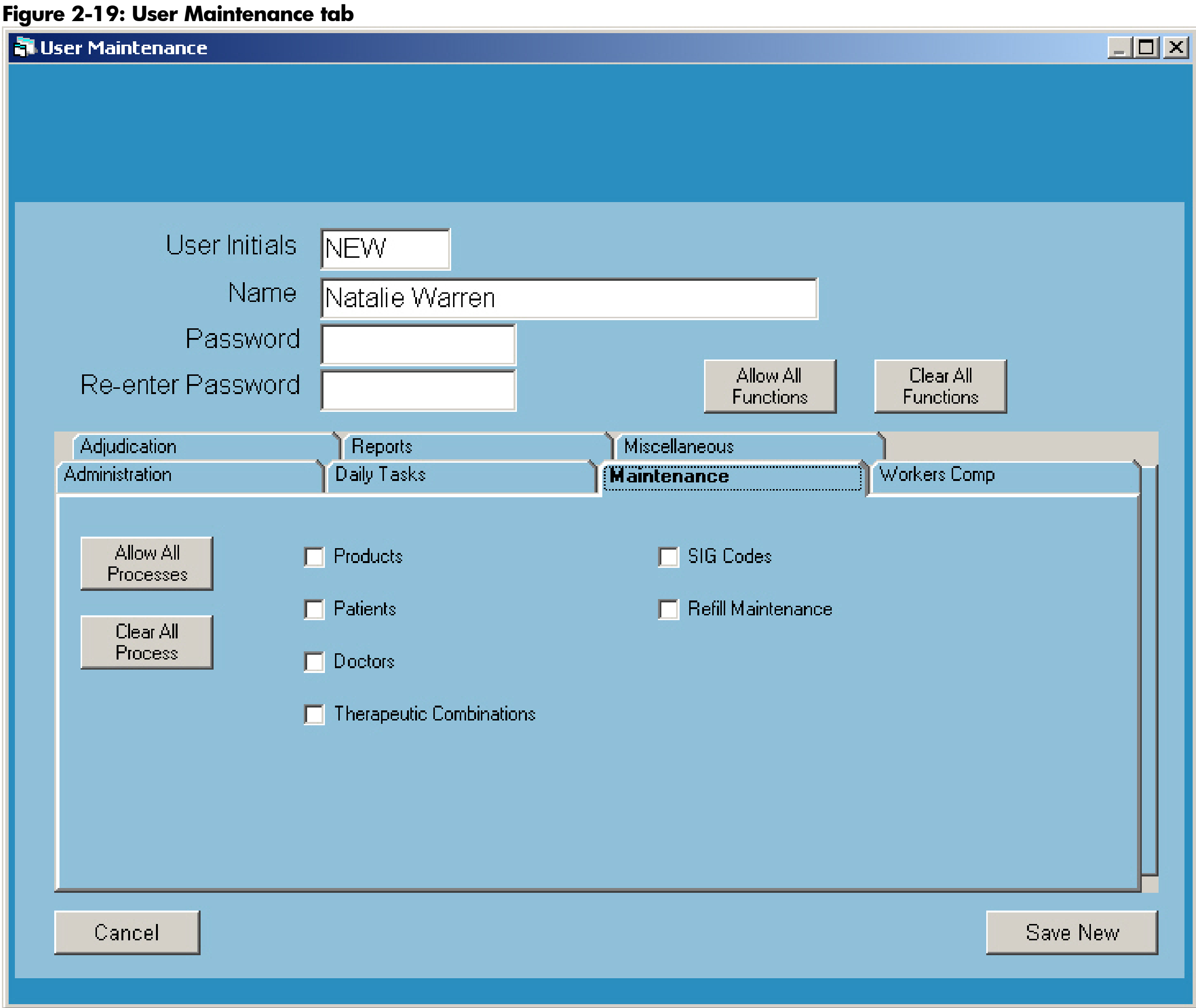
Maintenance tab

In the Maintenance tab, the user may be given authorization to perform maintenance tasks for the following (see Figure 2-19):

- Products
- Patients
- Doctors
- Therapeutic Combinations
- SIG Codes
- Refill Maintenance

When the desired authorization settings have been checked, click **Save New.**.

Figure 2-19: User Maintenance tab



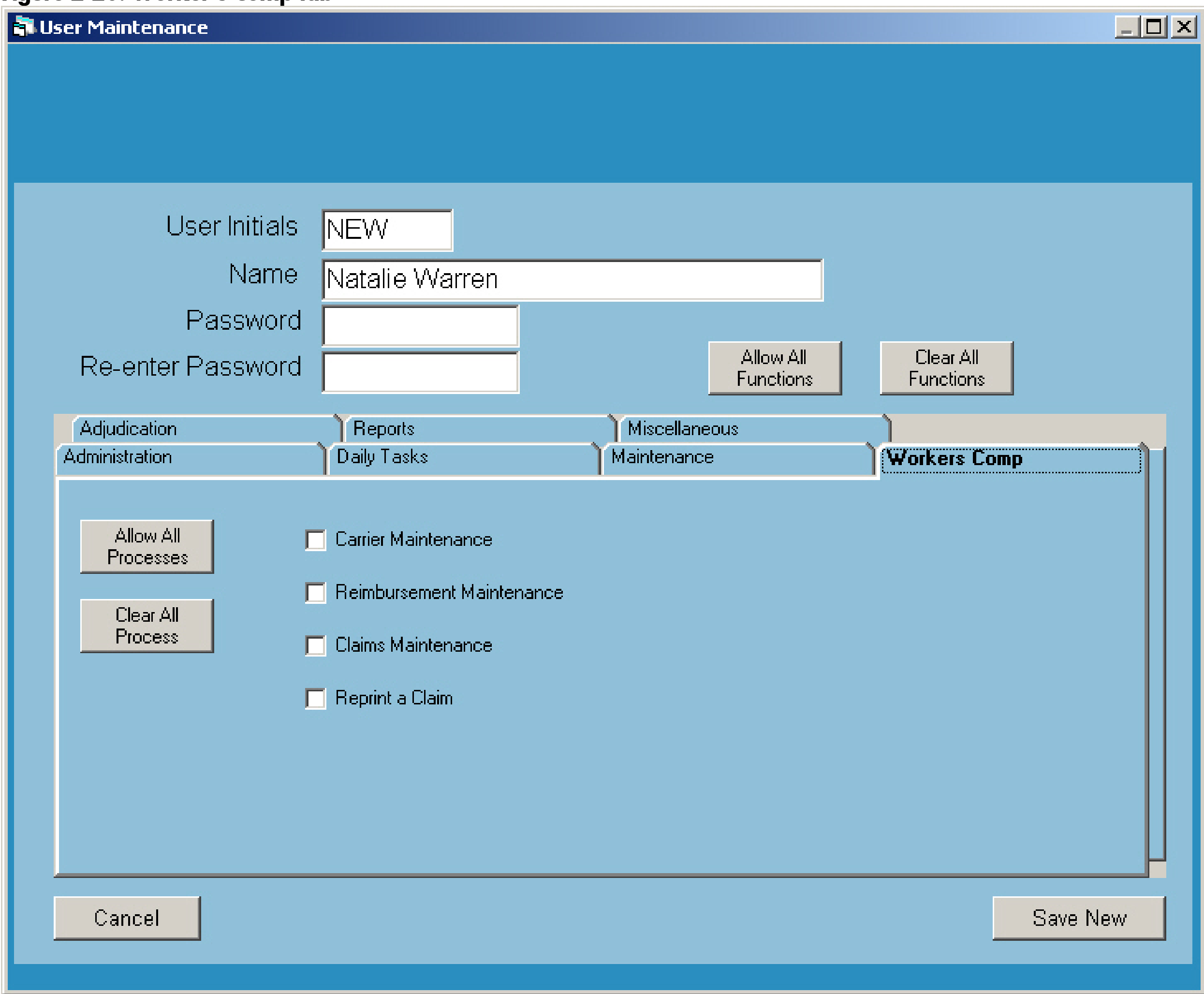
Worker's Comp tab

In the Worker's Comp tab, the user may be authorized to perform the following processes (see Figure 2-20):

- Carrier Maintenance
- Reimbursement Maintenance
- Claims Maintenance
- Report a Claim

When the desired authorization settings have been checked, click **Save New.**

Figure 2-20: Worker's Comp tab



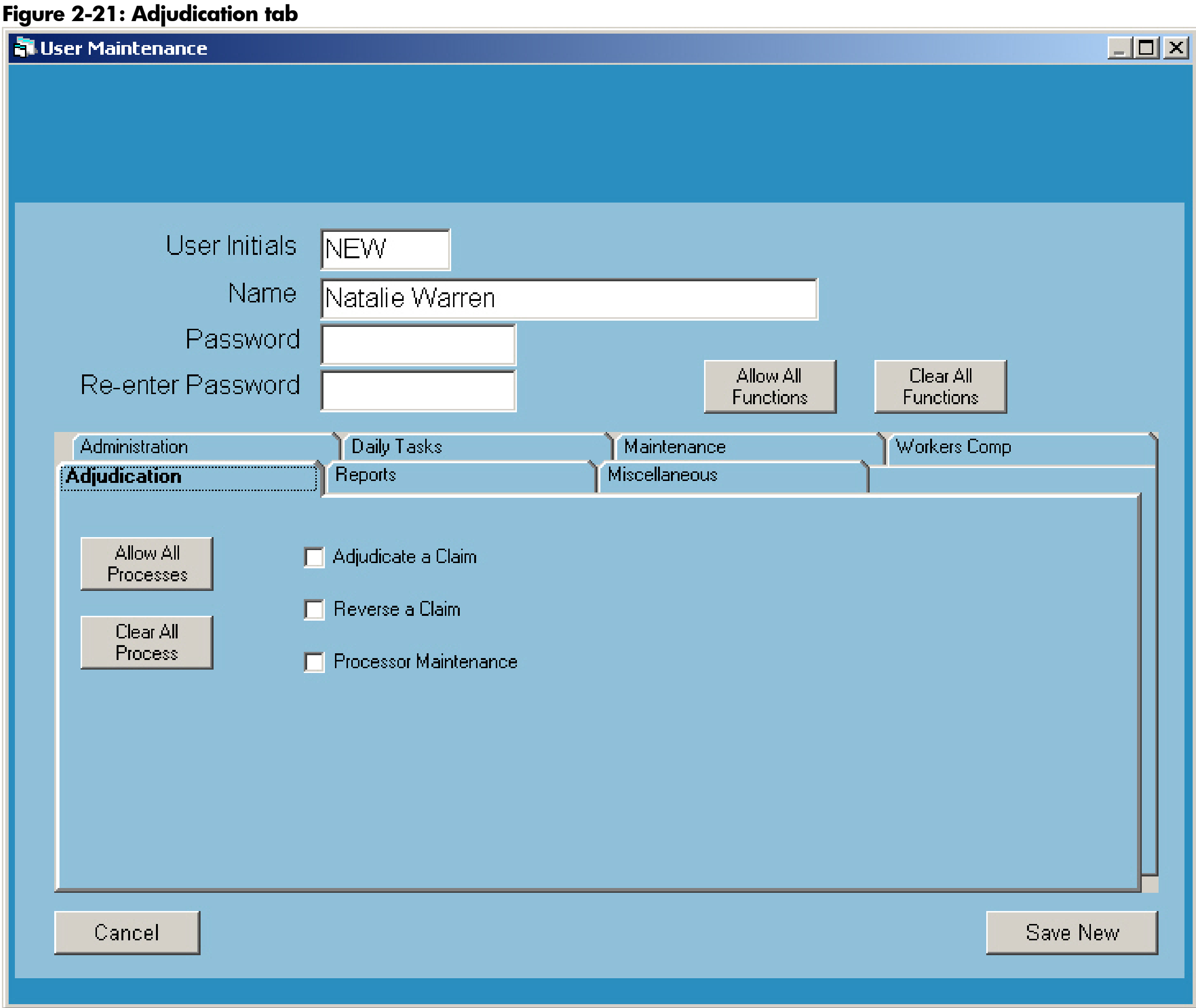
Adjudication tab

In the Adjudication tab, the user may be authorized to perform the following processes (see Figure 2-21):

- Adjudicate a Claim
- Reverse a Claim
- Processor Maintenance

When the desired authorization settings have been checked, click **Save New**.

Figure 2-21: Adjudication tab



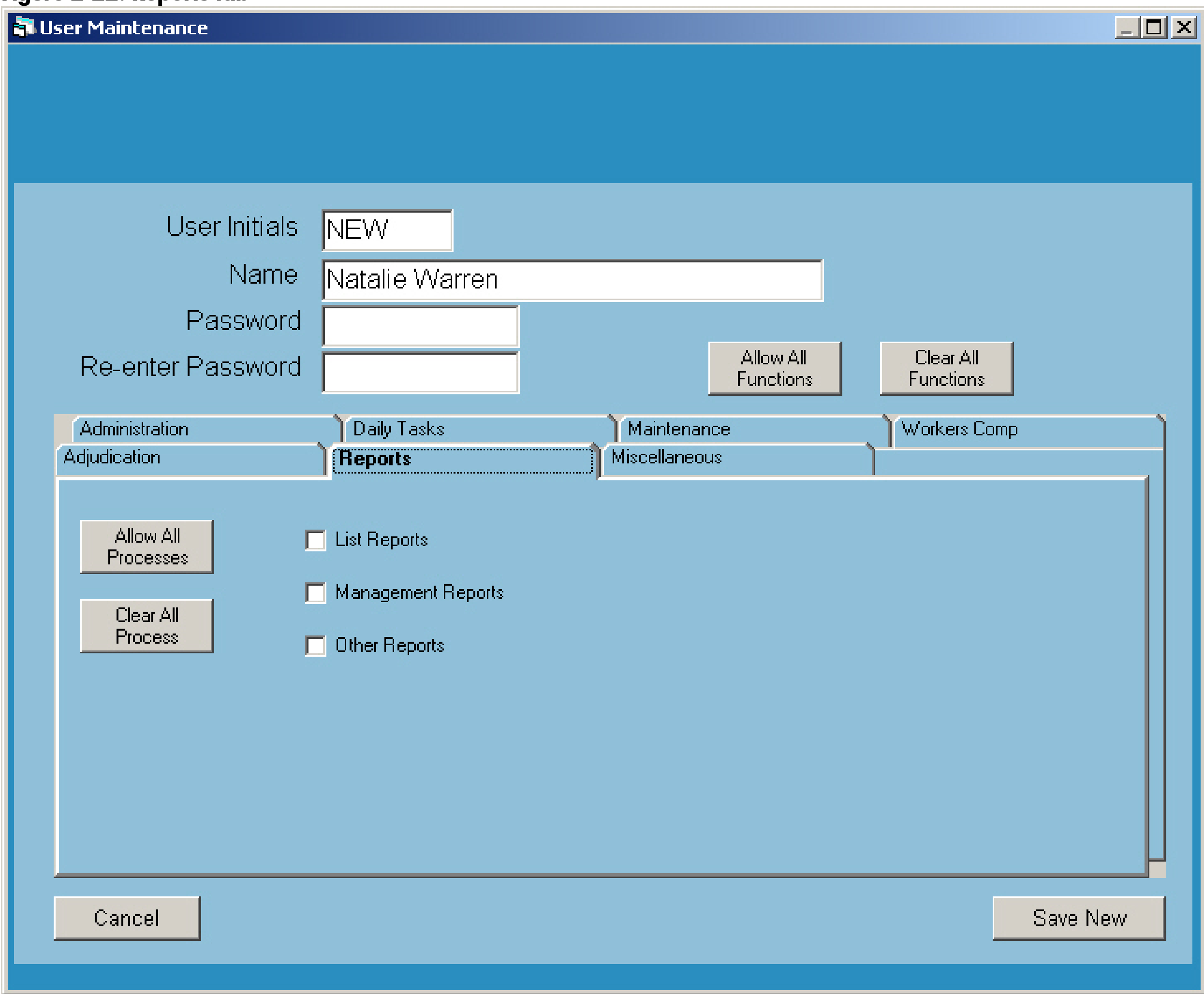
Reports tab

In the Reports tab, the user may be authorized to generate the following reports (see Figure 2-22):

- List Reports
- Management Reports
- Other Reports

When the desired authorization settings have been checked, click **Save New**.

Figure 2-22: Reports tab



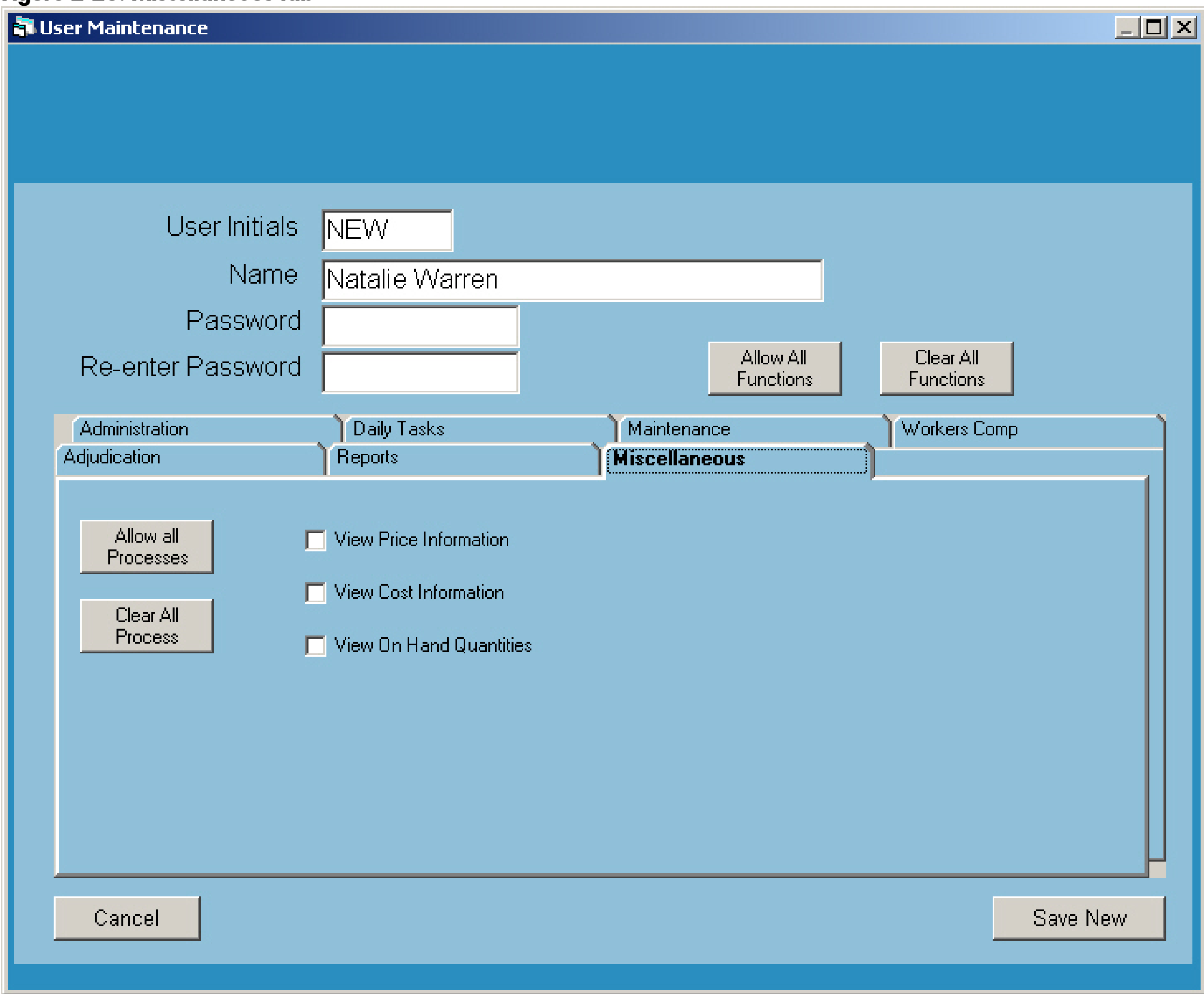
Miscellaneous tab

In the Miscellaneous tab, the user may be authorized to view the following (see Figure 2-23):

- View Price Information
- View Cost Information
- View On Hand Quantities

When the desired authorization settings have been checked, click **Save New**.

Figure 2-23: Miscellaneous tab



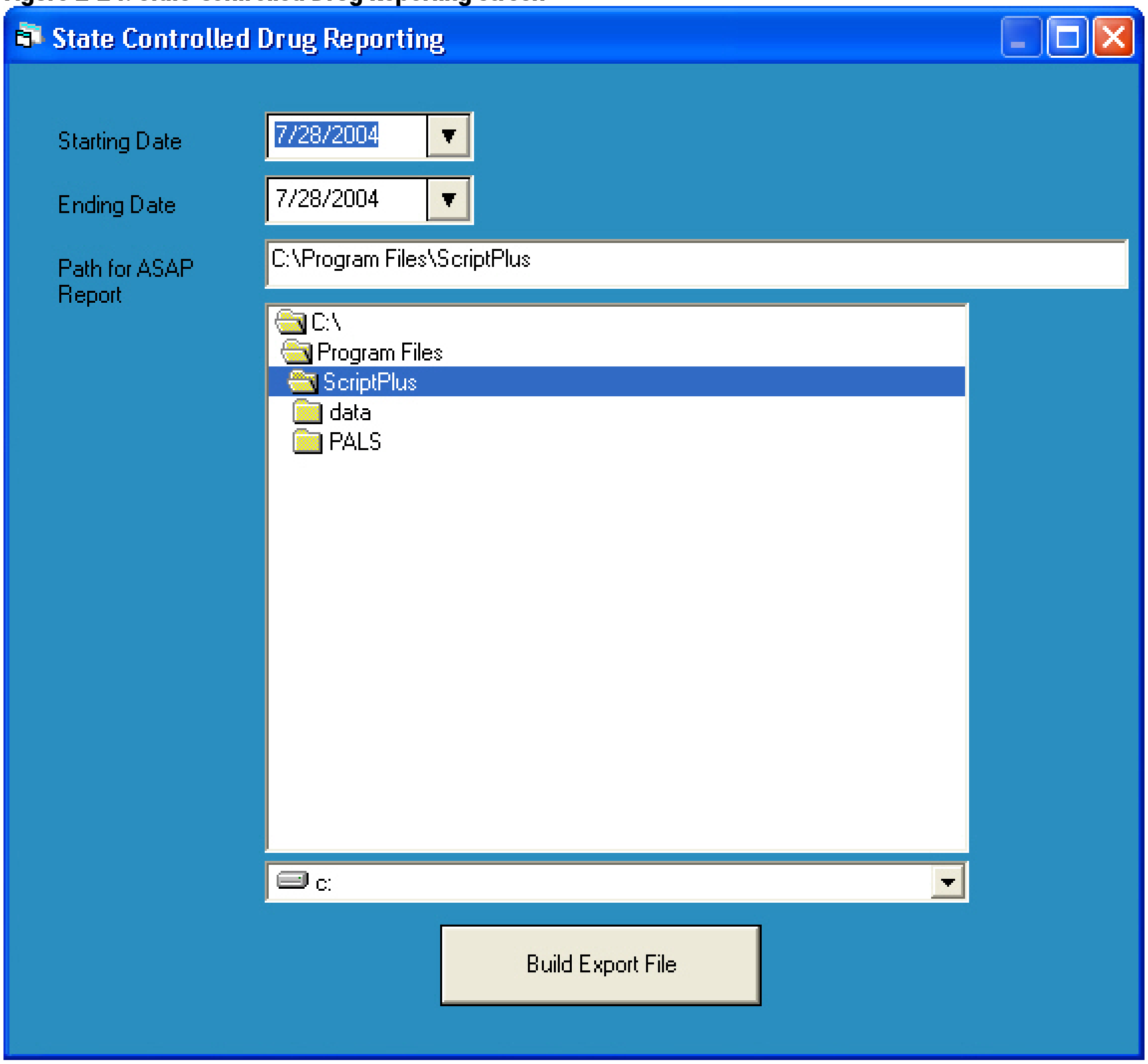
State Controlled Drug Export

The State Controlled Drug Reporting screen allows you to set up and export ASAP reports required by your state when controlled drugs are dispensed (see Figure 2-24).

1. Select the starting and ending date for your report by typing in the dates or by clicking the arrow within each date field to access a calendar.
2. You can type the designated file pate in the Path for ASAP Report field, or use the directory window to navigate to the location where you want to export the report file. When you select the directory, the file path will display in the field.

3. Click **Build Export File**. The ASAP .DAT file will be located in the designated location, in the file format designated in your System Setup.
4. Diskette and mailing labels will print, as indicated in your System Setup.

Figure 2-24: State Controlled Drug Reporting screen



Chapter

3

The Maintenance Menu

The ScriptPlus Maintenance menu offers a selection of database maintenance functions for:

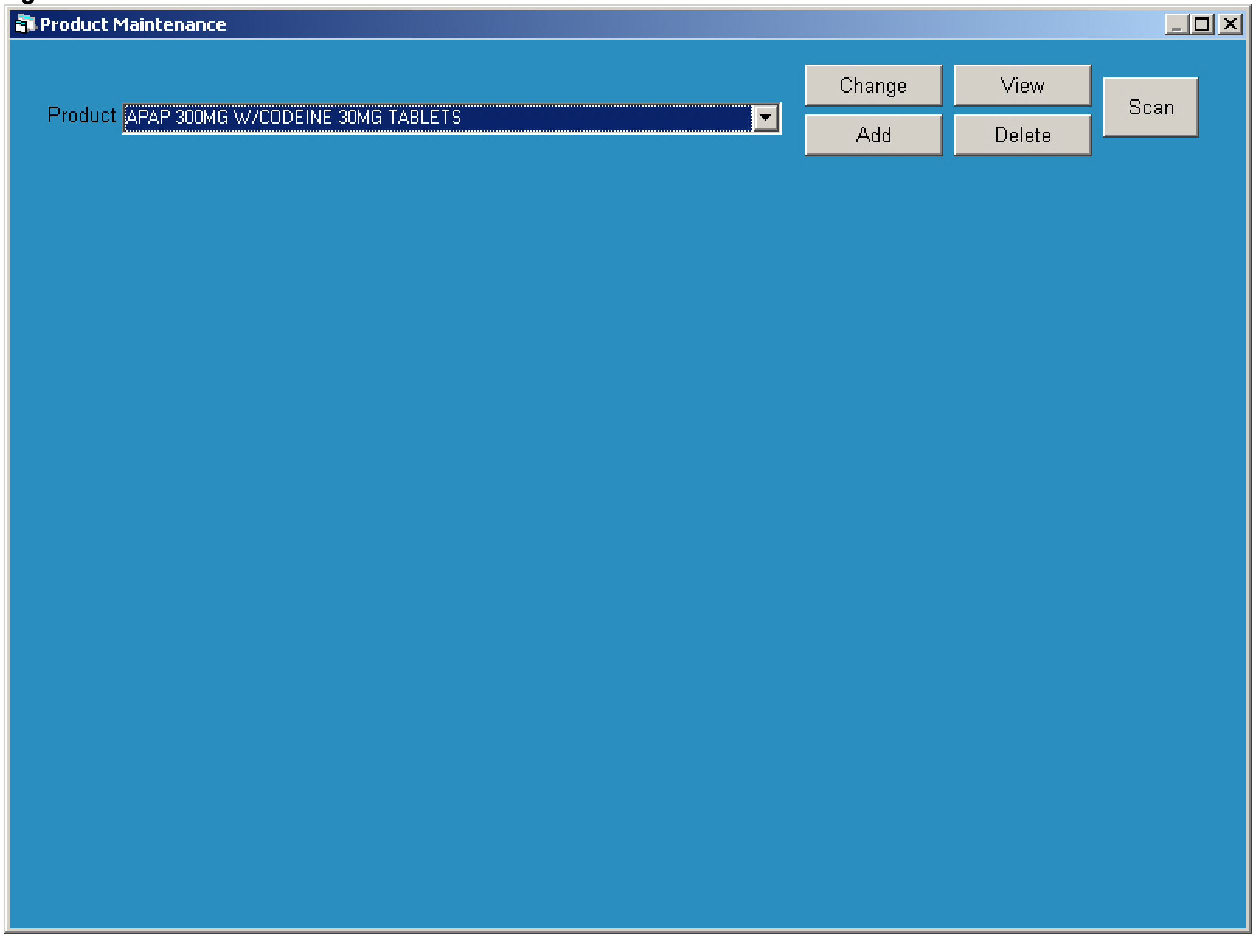
- Products
- Therapeutic Combinations
- Patient records
- Patient Worker's Comp records
- Physicians
- SIG Codes
- Processors

Product Maintenance

The Product Maintenance screen is used to add or revise product information. The main Product Maintenance screen contains a drop-down list of Products, and offers five functions
(see Figure 3-1):

- **Change** – to change product information
- **Add** – to add a new product
- **View** – to view product information
- **Delete** – to delete a product
- **Scan** – to use a bar code scanner

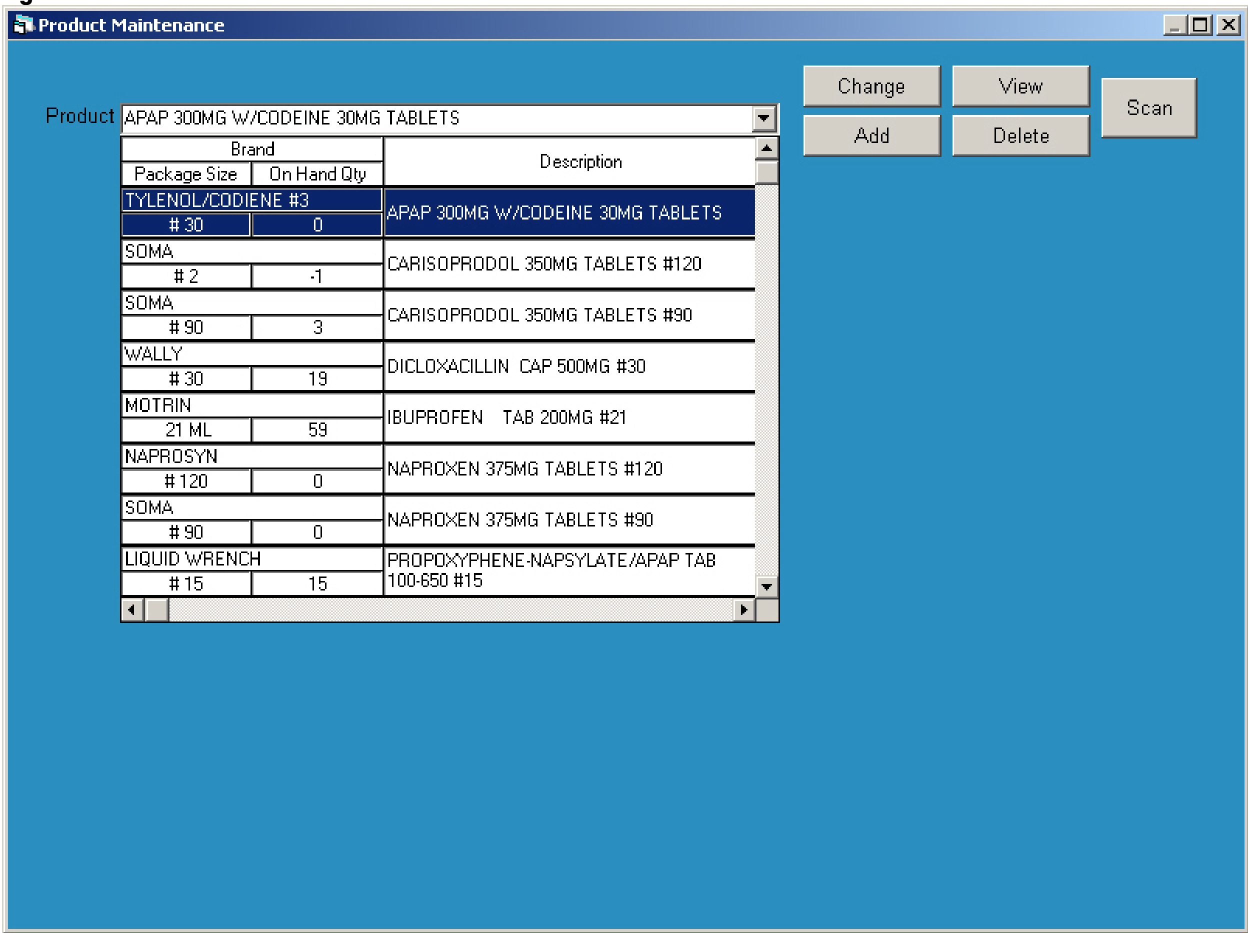
Figure 3-1: Product Maintenance screen



Product Description

The drop-down Product menu allows you to select a product by name (see Figure 3-2).

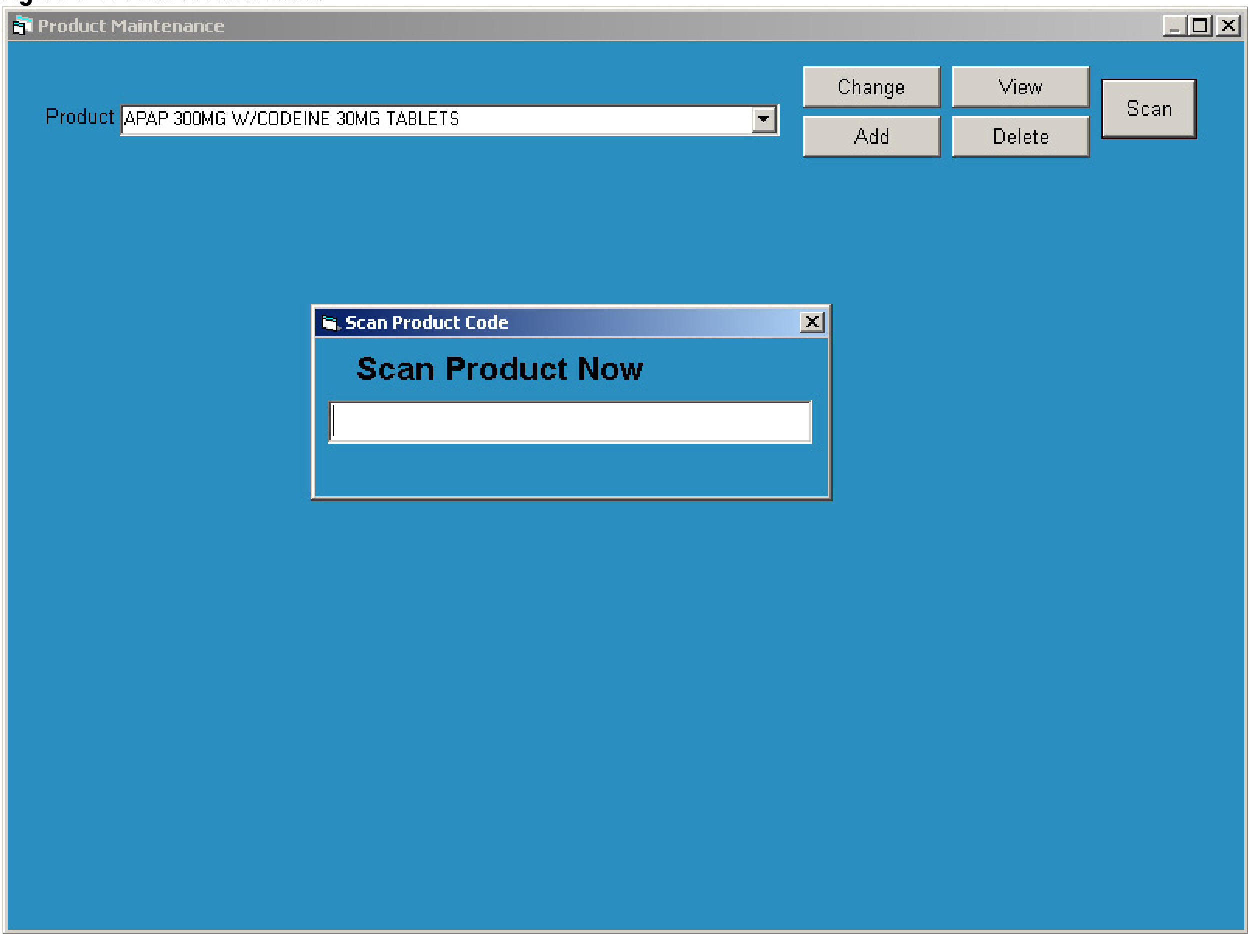
Figure 3-2: Product List



Scan Product Code

You can also scan the product code from an existing product label. Click the **Scan** button and scan the product label when prompted (see Figure 3-3).

Figure 3-3: Scan Product Label



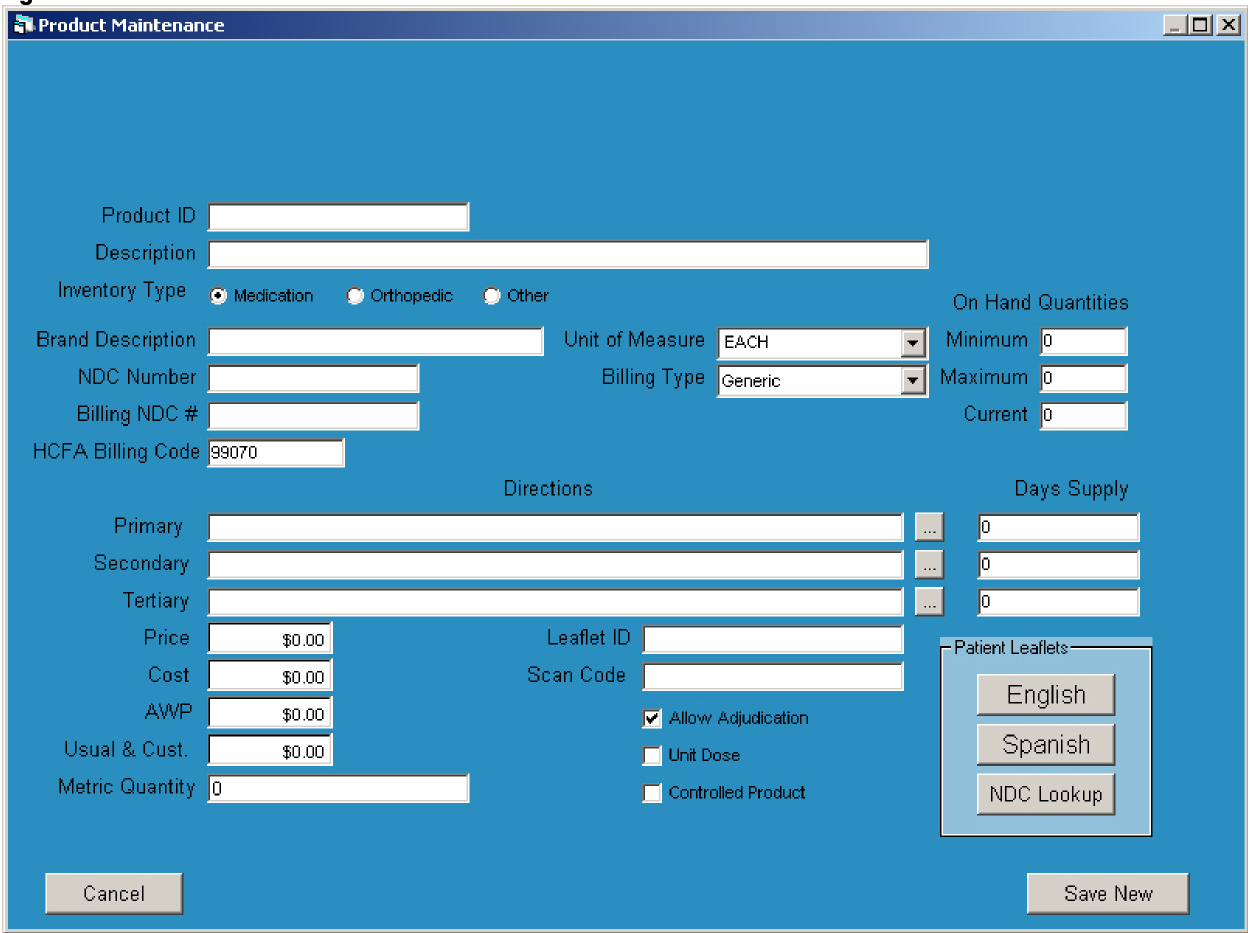
Change, View, or Delete Product Information

To change, view, or delete product information, select the product name from the drop-down Product list (see Figure 3-2). Then, click **Change, View, or Delete**.

Add a new product

1. To add new product information, click **New** (see Figure 3-4).
2. Complete the product information fields.
3. When you have completed the fields, click **Save New**.

Figure 3-4 : Add New Product



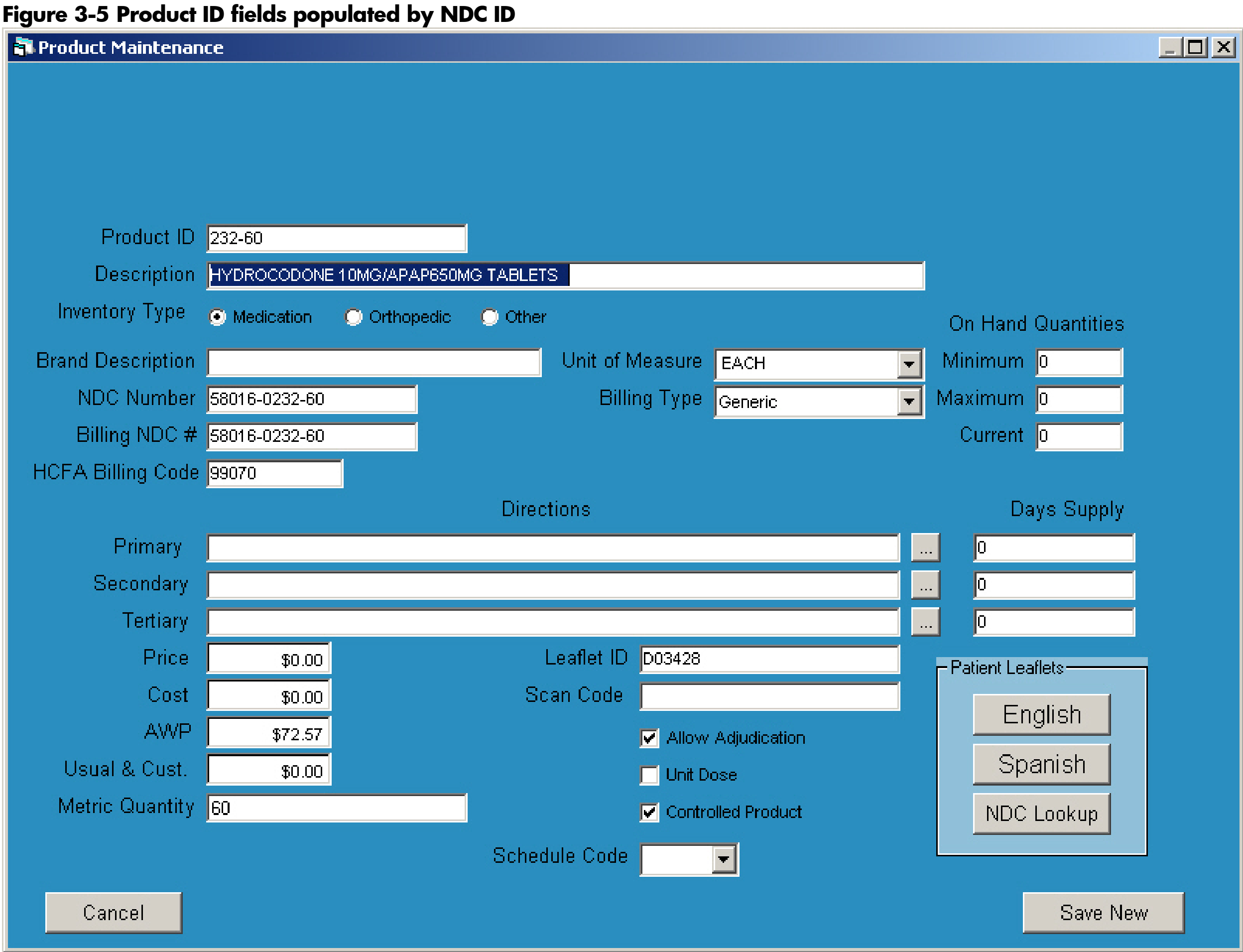
Product ID

Type a unique product identification number in this field. It is strongly recommended that the last two sections of the NDC number be used for the Product ID.

For example, the NDC number for Hydrocodone 10mg/Apap 650mg #60 tablets is 58016-0232-60. The product number for this item would be 0232-60 (or 232-60; the leading zero is not needed).

If the NDC segment is used for the Product ID, the system will look up the product and populate product fields with appropriate information (see Figure 3-5

Figure 3-5 Product ID fields populated by NDC ID



Description

Accept the description provided by the system (when an NDC Product ID is used), or enter a new product description.

Inventory Type

Select **Medication**, **Orthopedic**, or **Other**.

Brand Description

Type the Brand Description (or Brand Equivalent).

For example, the Brand name for Hydrocodone is Lorcet 10/650.

NDC Number

The NDC number associated with the product. This number is provided by the system when an NDC Product ID is used.

Units of Measure

Select an appropriate designation from the drop-down list:

- Each
- Grams
- Milliliters

Billing Type

Select an appropriate designation from the drop-down list:

- Generic
- Brand
- Generic OTC
- Brand OTC

On Hand Quantities

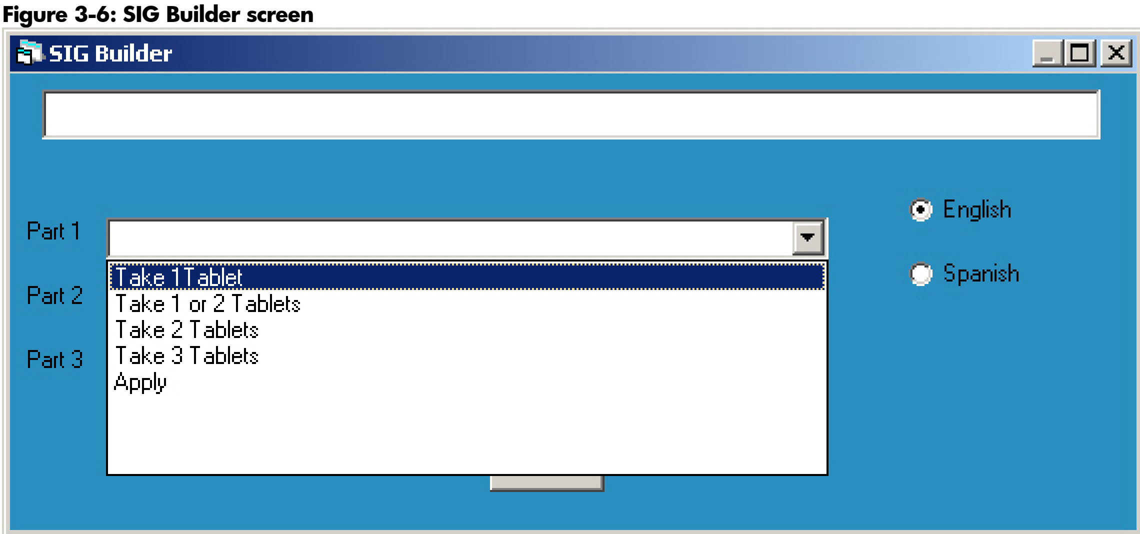
These inventory control fields allow you to enter the stocking levels you wish to maintain, and the on-hand information for the product:

- **Minimum** – the lowest stocking level you wish to maintain for this product.
- **Maximum** – the highest stocking level you wish to maintain for this product.
- **Current** – the current inventory for this product.

Directions

The Product Maintenance screen contains fields for primary, secondary, and tertiary dispensing directions. Each set of directions can be added by typing in the fields or by clicking the … button to the right of the field and choosing SIG entries from the SIG Builder screen (see Figure 3-6).

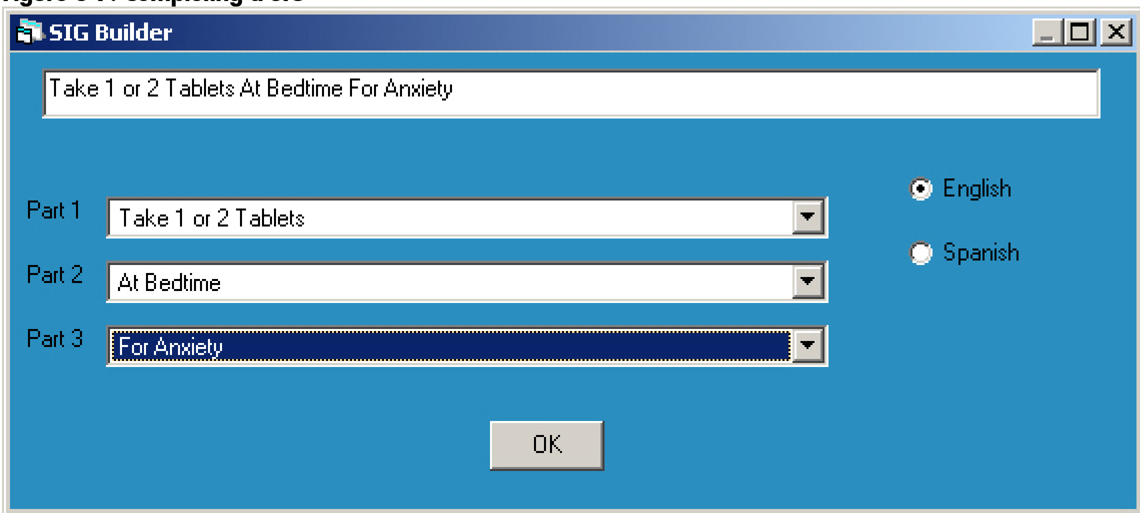
Figure 3-6: SIG Builder screen



Note: Select English or Spanish to generate a SIG in either language.

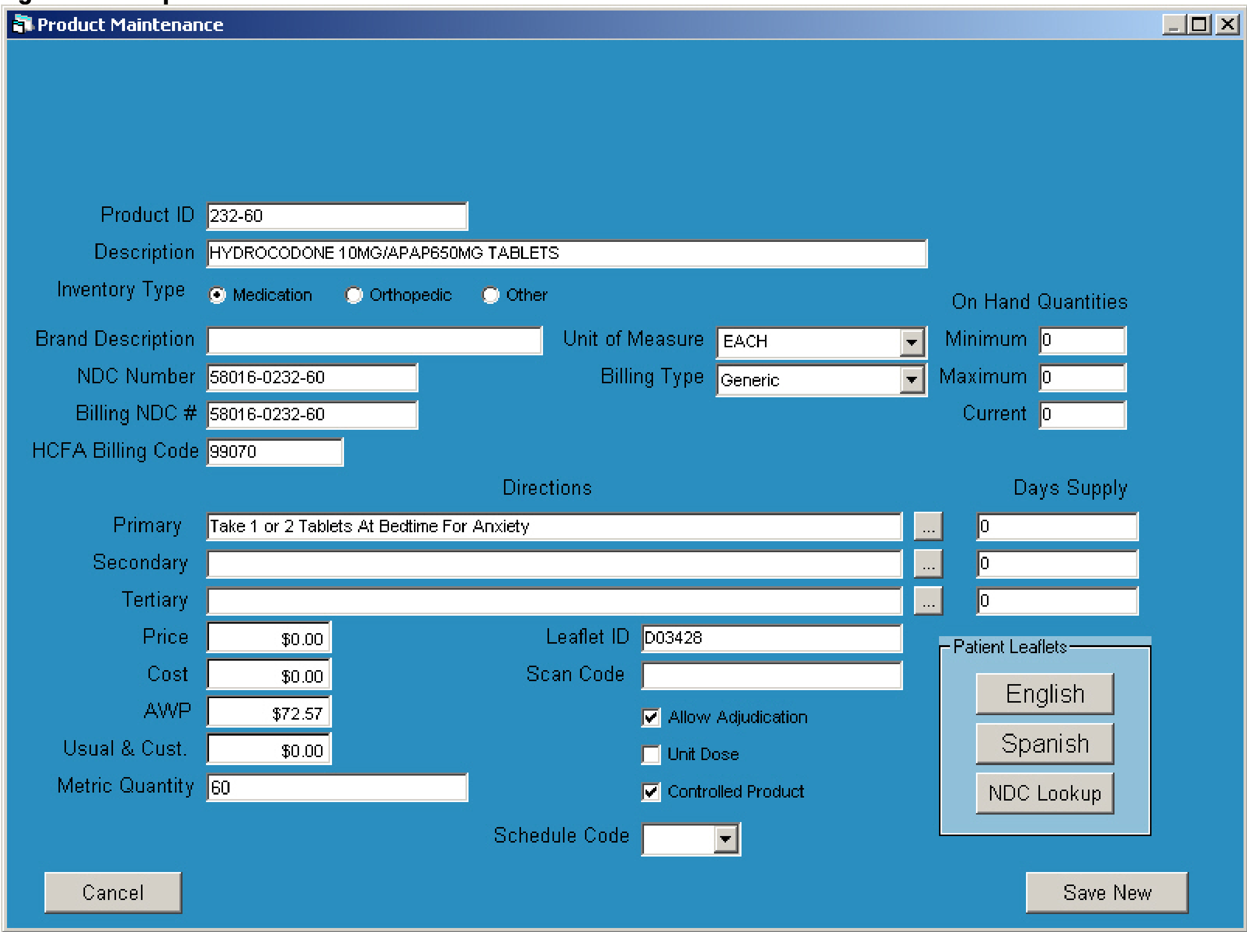
Select an appropriate phrase from the drop-down menus for each field (Part 1, Part 2, and Part 3) to complete the SIG for the selected product. As you select the phrase components, the SIG will appear in the top field (see Figure 3-7).

Figure 3-7: Completing a SIG



When the SIG information is completed, click **OK**. The completed SIG will appear in the Directions field (see Figure 3-8).

Figure 3-8 Completed Directions



Days Supply

Each SIG has an associated Days Supply.

For example, if you are dispensing a bottle of 30 pills, the Primary SIG may be “Take one tablet three times a day until gone.” The Days Supply for this SIG is 10 days. The Secondary SIG may be “Take one tablet daily before bed.” The Days Supply for this SIG would be 30.

Price

The cash price for this medication.

Cost

The actual cost of this medication the last time it was purchased.

AWP

Average Wholesale Price. This is the dollar figure assigned to drugs to be used in calculating reimbursement.

Usual & Customary

Usual and customary cost. Used by ScriptPlus for Adjudication and Workers Comp calculations.

Metric Quantity

A description of the actual quantity of medication in each package. Actual tablet and capsule count, grams of creams and ointments, or liquid milliliters.

Leaflet ID

The Leaflet ID generates the Patient Education Leaflet. When the NDC segment is used for the Product ID, this field is populated correctly. You can also click **NDC Lookup** to locate a Leaflet ID based on the NDC number. Under normal circumstances, this field should not be changed.

Scan Code

If a bar code scanner is used, this field is the link between the product and the bar code. Use the following steps:

Add a new record (or edit a record which does not have a scan code or which has a changed scan code)

1. Fill in the appropriate fields
2. Position the cursor in the scan field
3. Scan the item (using the bar code scanner)
4. Save your changes

When the Scan Code is completed, you can click the **Scan** button whenever it is available in the system, to scan the product.

Allow Adjudication

Select this box for products that can be adjudicated.

Note: Some products are very unprofitable to adjudicate. For those items, make sure this box is not selected.

Unit Dose

Unit dose medications adjudicate differently than non-Unit dose products. Select this box for all medications that are Unit Dose.

Controlled Product

Select this box if this product is considered a controlled product by the DEA.

Schedule Code

This field only displays if the Controlled Product box is checked. Each controlled product will have a specific code. Select the code from the drop-down list.

Patient Leaflet

- Click **English** to display the English version of the PEL.
- Click **Spanish** to display the Spanish version of the PEL.
- Click **NDC Lookup** to find a Leaflet ID for this product. ScriptPlus will search the database and, if a listing is found for the specified NDC number, the Leaflet ID number will display in the Leaflet ID field, and will overwrite the existing Leaflet ID.

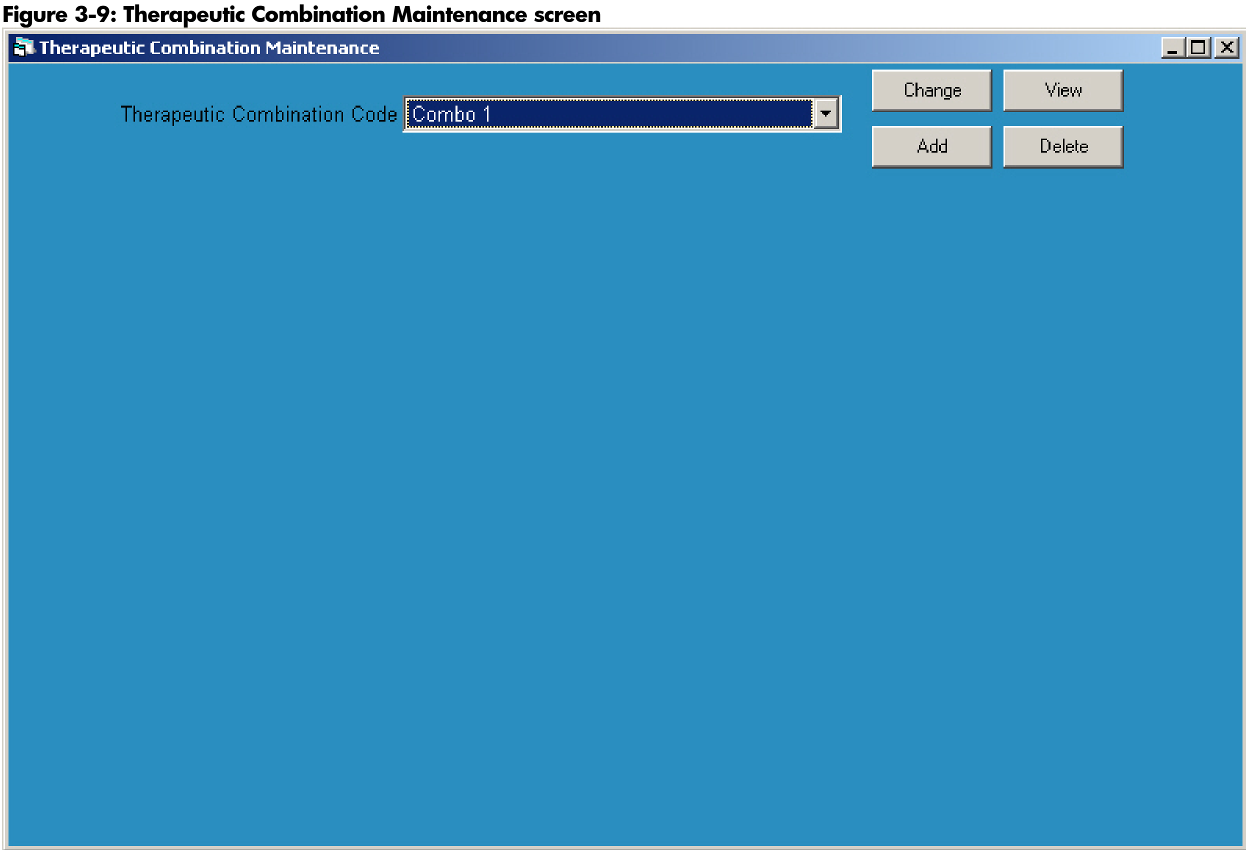
Therapeutic Combination Maintenance

The Therapeutic Combination Maintenance screen allows you specify a group of drugs commonly dispensed at the same time to one patient. For example, it is common to dispense an anti-nausea drug with a pain-killer. Using Therapeutic Combinations, you can specify a combination of both drugs and dispense the combination at the same time. Up to four drugs can be combined in a Therapeutic Combination.

The main Therapeutic Combination Maintenance screen contains a drop-down list of Therapeutic Combinations, and offers four functions (see Figure 3-9):

- **Change** – to change Therapeutic Combination information
- **Add** – to add a new Therapeutic Combination
- **View** – to view Therapeutic Combination information
- **Delete** – to delete a Therapeutic Combination

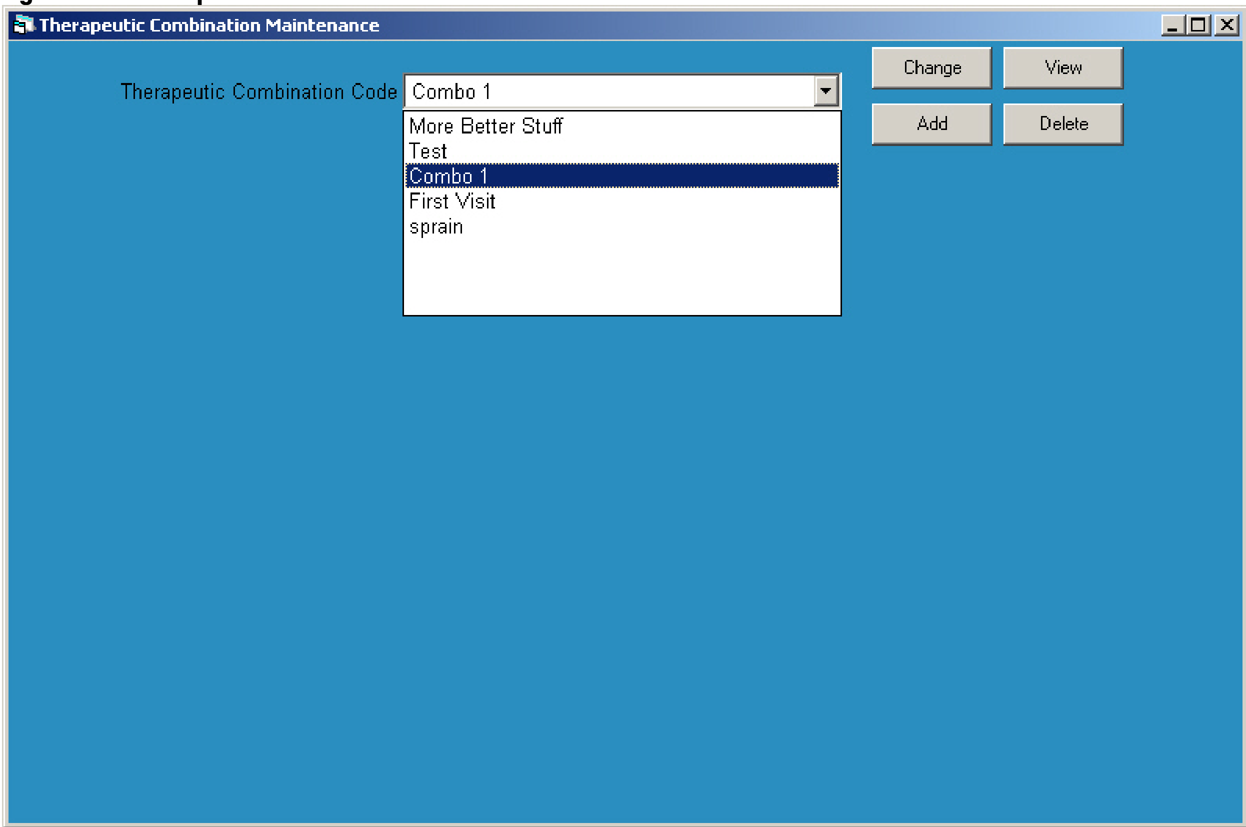
Figure 3-9: Therapeutic Combination Maintenance screen



Change, View, or Delete Therapeutic Combination information

To change, view, or delete Therapeutic Combination information, select the Therapeutic Combination from the drop-down Therapeutic Combination Code list (see Figure 3-10). Then, click **Change, View, or Delete**.

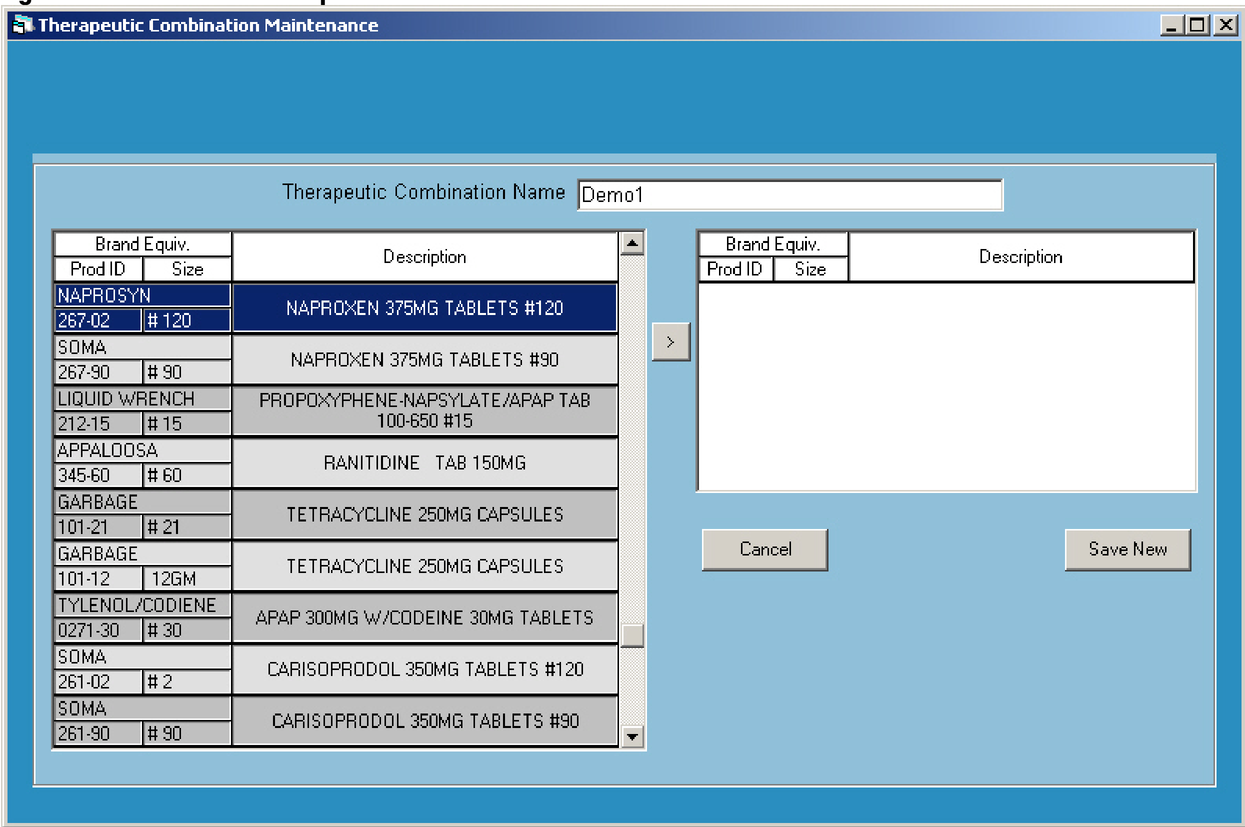
Figure 3-10: Therapeutic Combination Code list



Add a new Therapeutic Combination

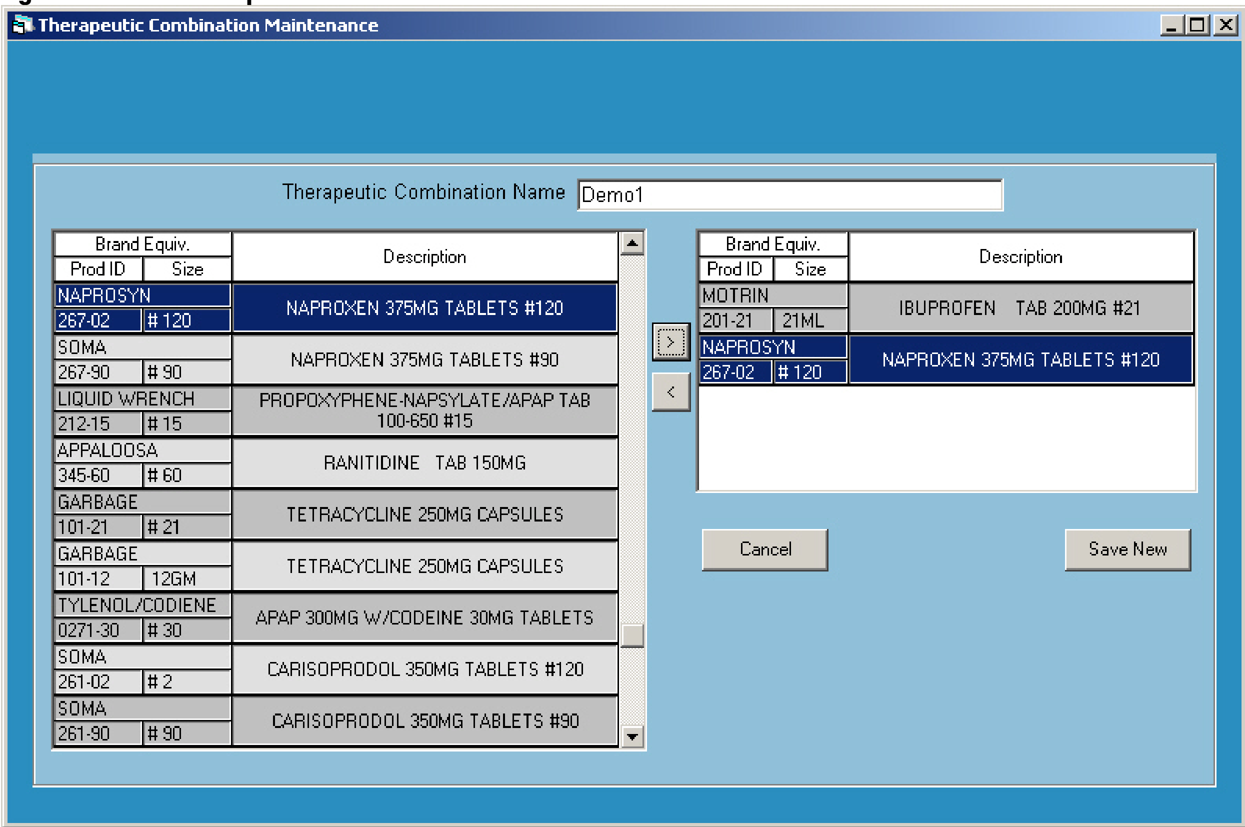
1. To add a new Therapeutic Combination, click **Add**.
2. Type the name of the new Therapeutic Combination (see Figure 3-11).

Figure 3-11: Add a new Therapeutic Combination



3. Select a product from the left window and click the **>** button to move it to the right window.
4. Select as many products as needed for the new Therapeutic Combination (see Figure 3-12).
5. When the combination is complete, click **Save New**.

Figure 3-12: Add Therapeutic Combination Products

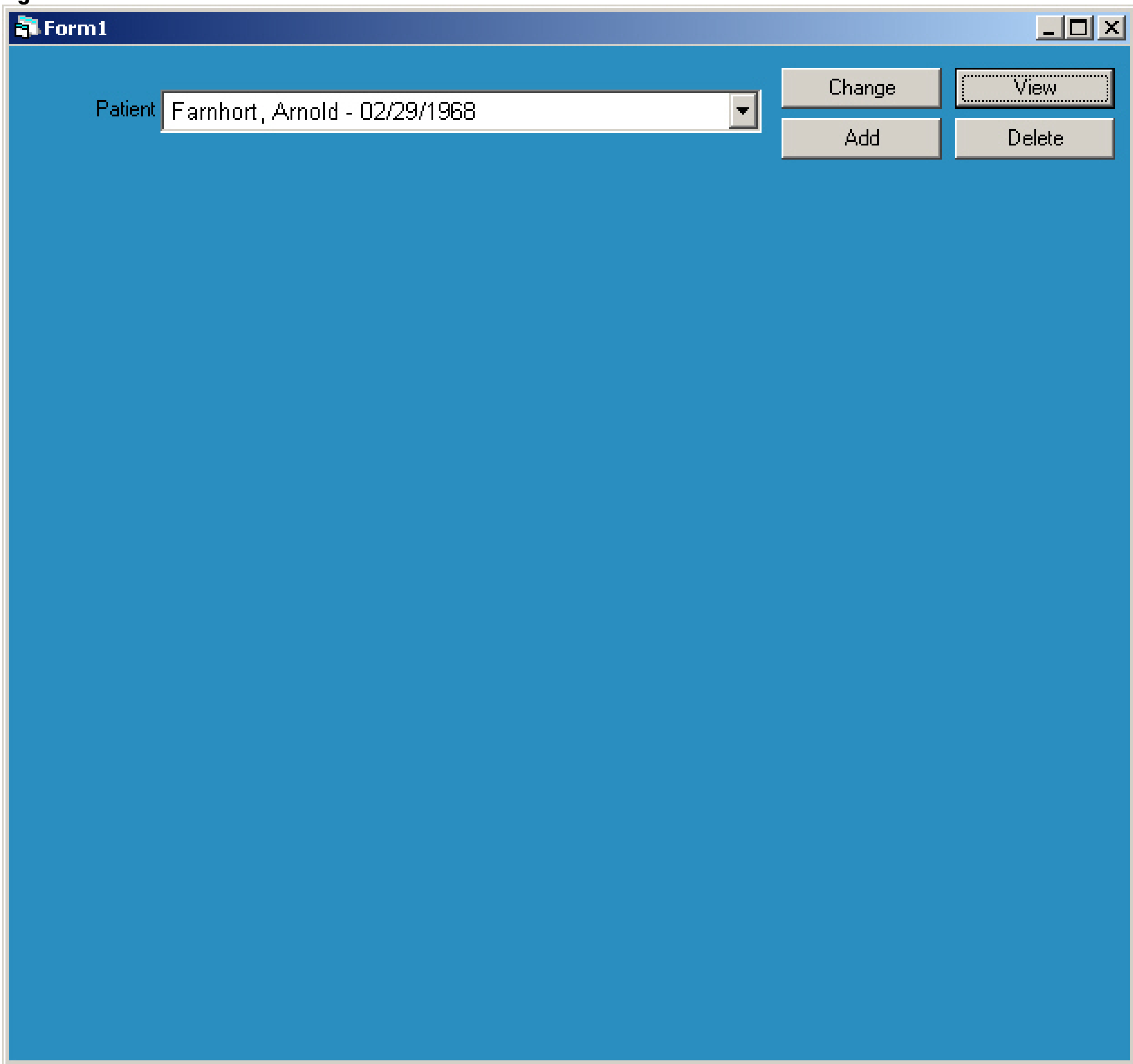


Patient Maintenance

The main Patient Maintenance screen contains a drop-down list of patients, and offers four functions (see Figure 3-13):

- **Change** – to change Patient information
- **Add** – to add a new Patient
- **View** – to view Patient information
- **Delete** – to delete a Patient

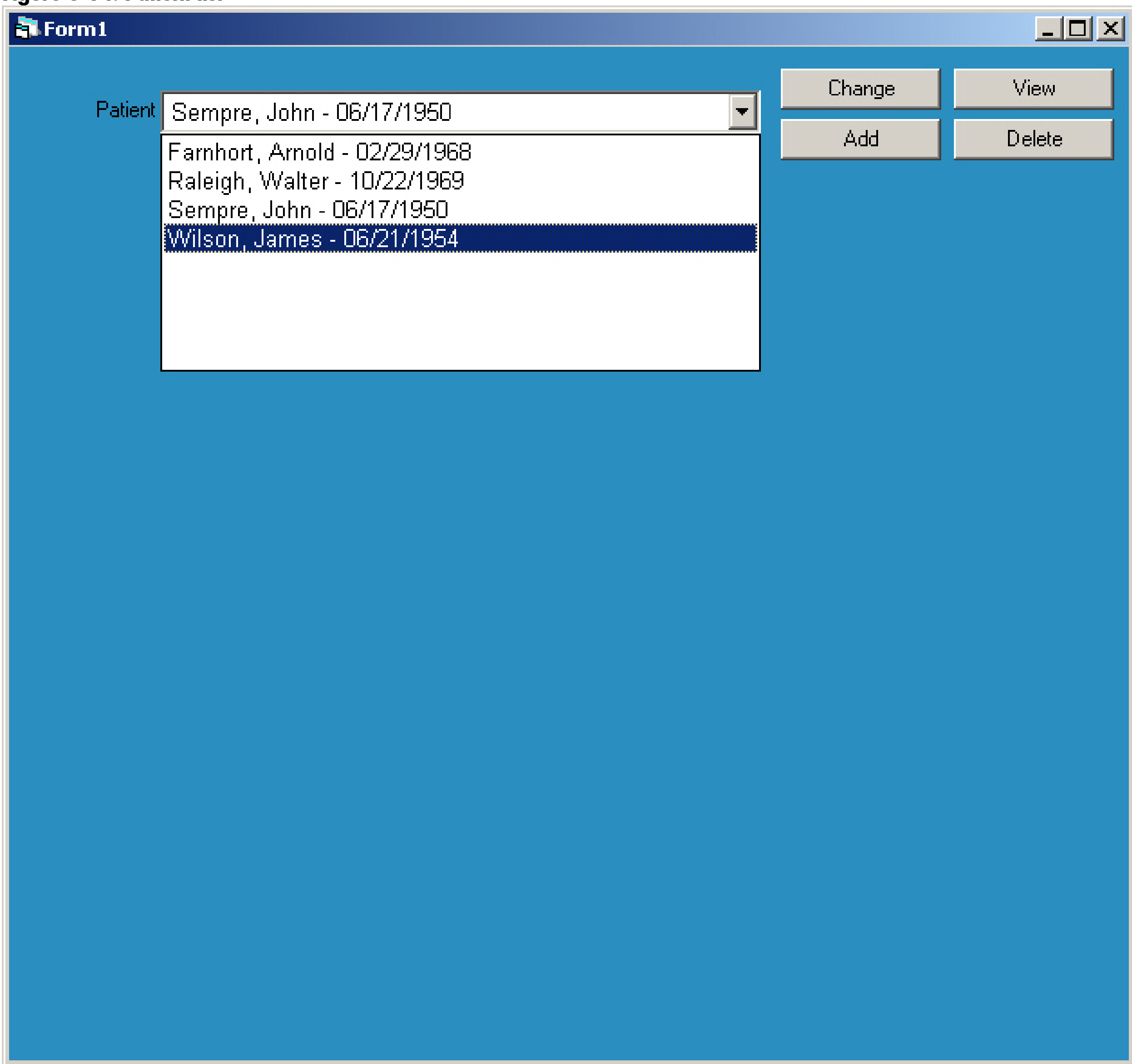
Figure 3-13: Patient Maintenance main screen



Change, View, or Delete Patient Information

To change, view, or delete Patient information, select the Patient name from the drop-down Patient list (see Figure 3-14). Then, click **Change, View, or Delete**.

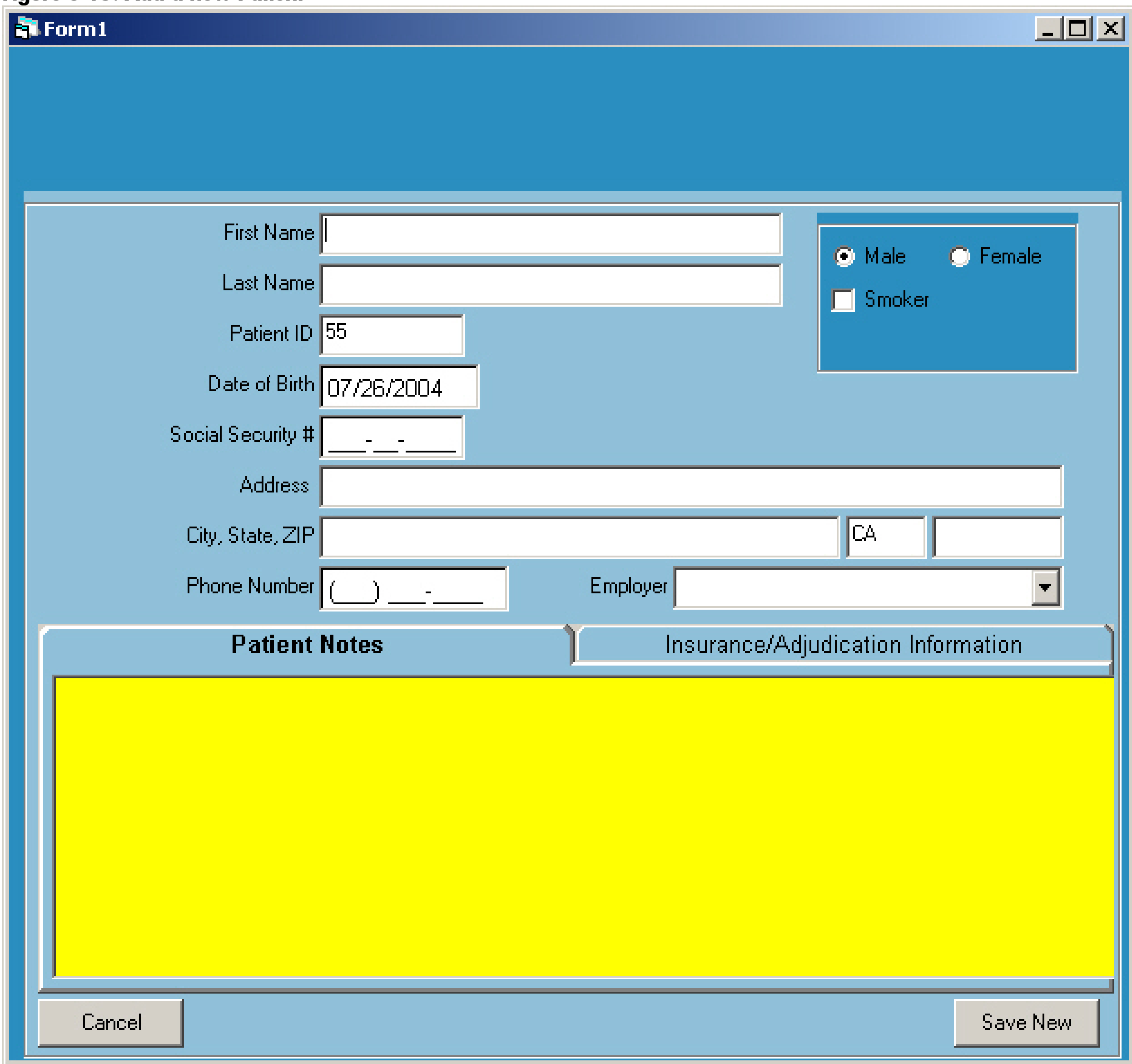
Figure 3-14: Patient list



Add a new Patient

1. To add a new Patient, click **Add**.
2. Complete the Patient information fields (see Figure 3-15):
3. When the information is complete, click **Save New**.

Figure 3-15: Add a new Patient



First Name

Type the patient's first name.

Last Name

Type the patient's last name.

Patient ID

If Auto Assign Patient Number was selected in the System Setup, a unique patient number is assigned by the ScriptPlus system. If the number is not system-assigned, the patient chart number is often used for the Patient ID.

If you are importing from Practice Management software, this is the PM Patient ID.

Date of Birth

Type the patient's date of birth.

SSN

Type the patient's social security number.

Address

Type the patient's street or mailing address.

City, State, Zip

Type the patient's City, State, and Zip code.

Phone

Type the patient's telephone number.

Employer

(available only if Workers Comp is selected in System Setup)

Select an employer from the drop-down list.

Gender, Smoker

Select the patient's gender, and whether or not the patient is a smoker.

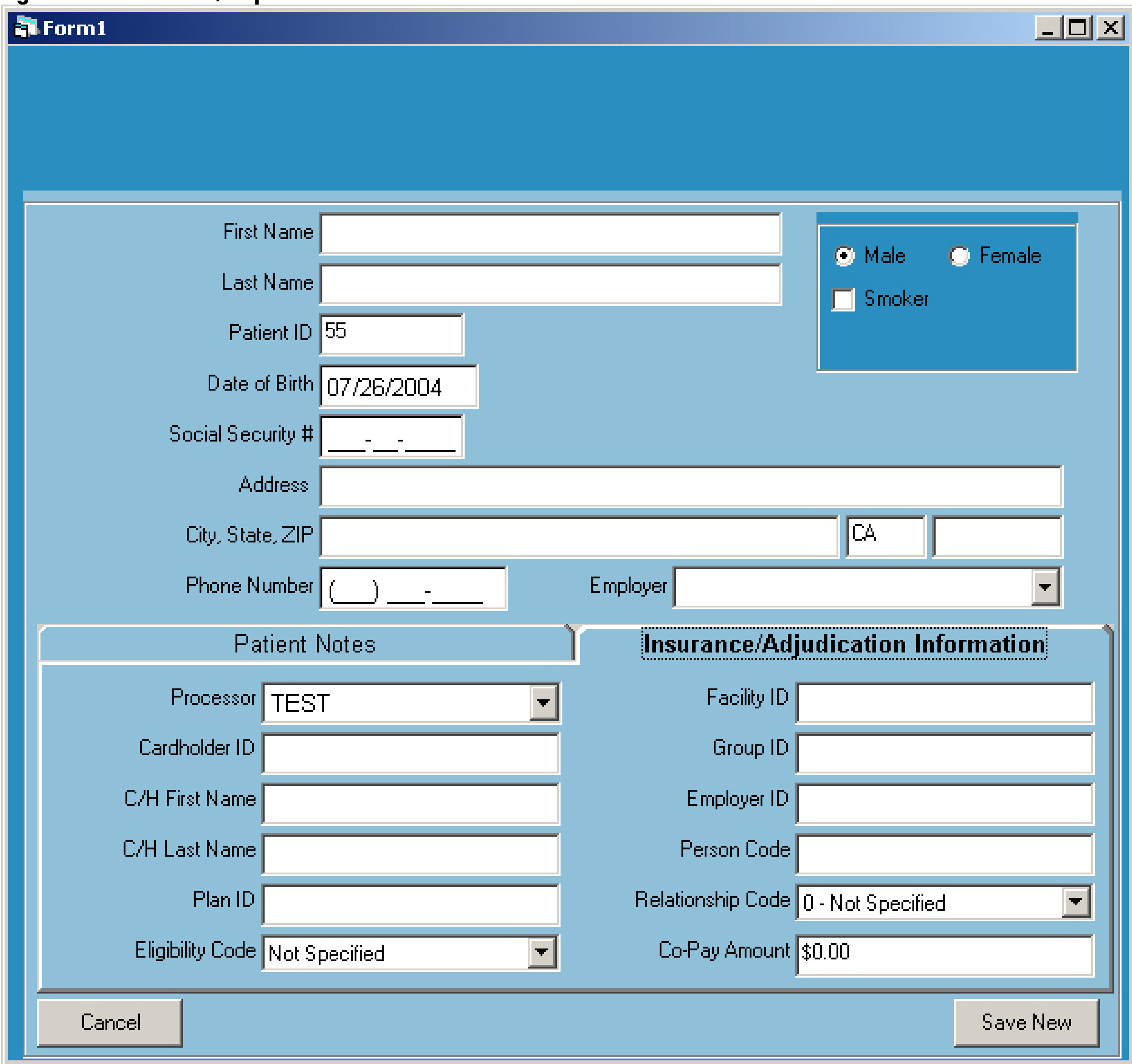
Patient Notes tab

This is a free-form field for adding patient notes. If notes are added, they will pop up in the Dispense screen when the patient is selected.

Insurance/Adjudication tab

The Insurance/Adjudication tab contains information fields specific to insurance and adjudication needs (see Figure 3-16):

Figure 3-16: Insurance/Adjudication tab



Processor – Adjudication is based on different prescription card processors. Processors are added in the Processor Maintenance screen and display on a drop-down list. Select the processor that corresponds to the patient's prescription drug card.

Cardholder ID – Type the Cardholder ID specified on the prescription card. This uniquely identifies the insured to the processor.

Card Holder First name, Last Name – Since the card holder may not be the patient (in the case of a spouse or children), the actual card holder name is specified here.

Plan ID – If required by the processor, type the information supplied on the prescription card.

Eligibility Code - If required by the processor, type the information supplied on the prescription card.

Facility ID - If required by the processor, type the information supplied on the prescription card.

Group ID - If required by the processor, type the information supplied on the prescription card.

Employer ID - If required by the processor, type the information supplied on the prescription card.

Person Code - If required by the processor, type the information supplied on the prescription card.

Relationship Code - If required by the processor, type the information supplied on the prescription card.

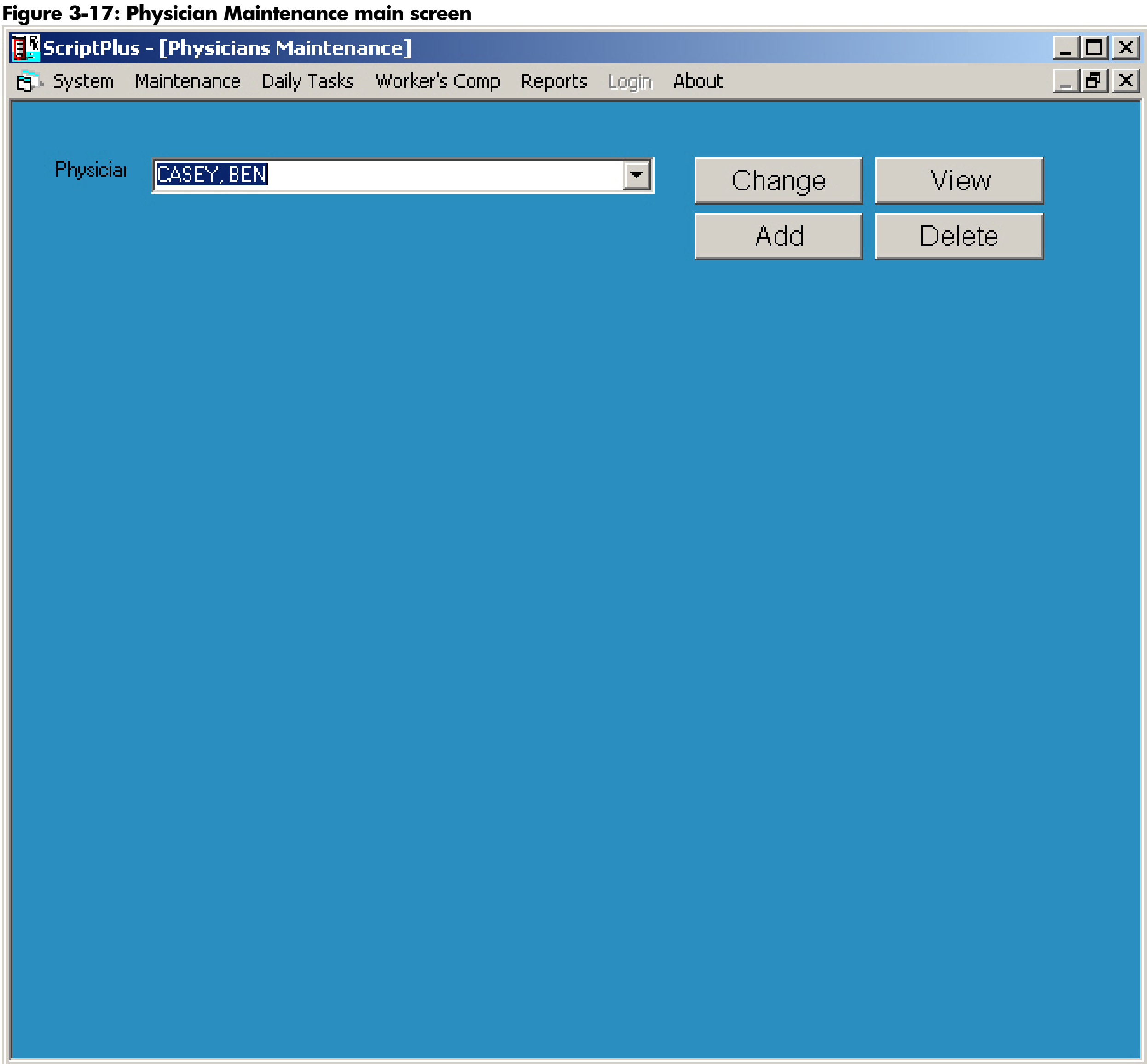
Co-Pay Amount – This information is also commonly specified on the prescription card.

Physician Maintenance

The main Physician Maintenance screen contains a drop-down list of physicians, and offers four functions (see Figure 3-17):

- **Change** – to change Physician information
- **Add** – to add a new Physician
- **View** – to view Physician information
- **Delete** – to delete a Physician

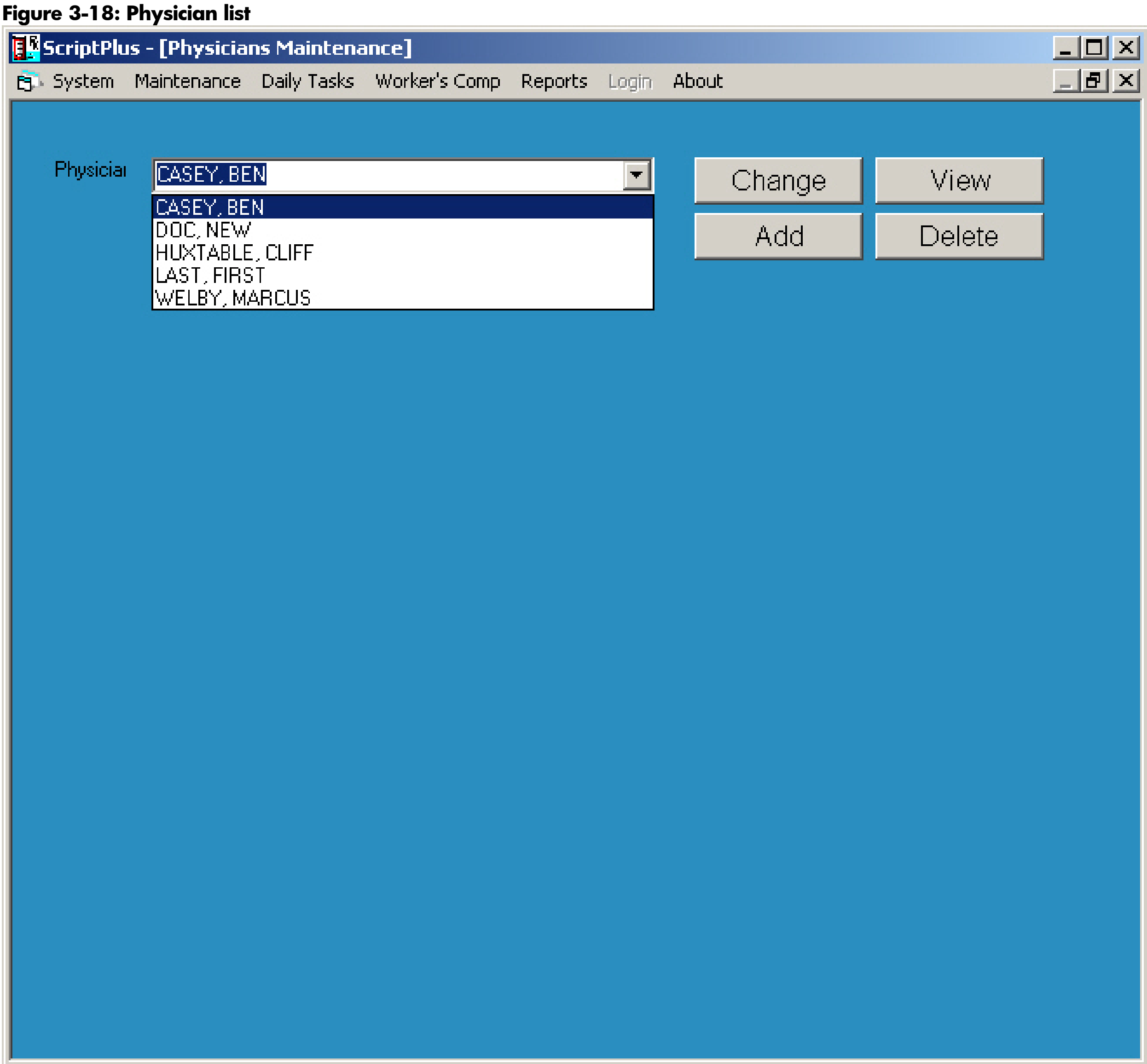
Figure 3-17: Physician Maintenance main screen



Change, View, or Delete Physician Information

To change, view, or delete Physician information, select the Physician name from the drop-down Physician list (see Figure 3-18). Then, click **Change, View, or Delete**.

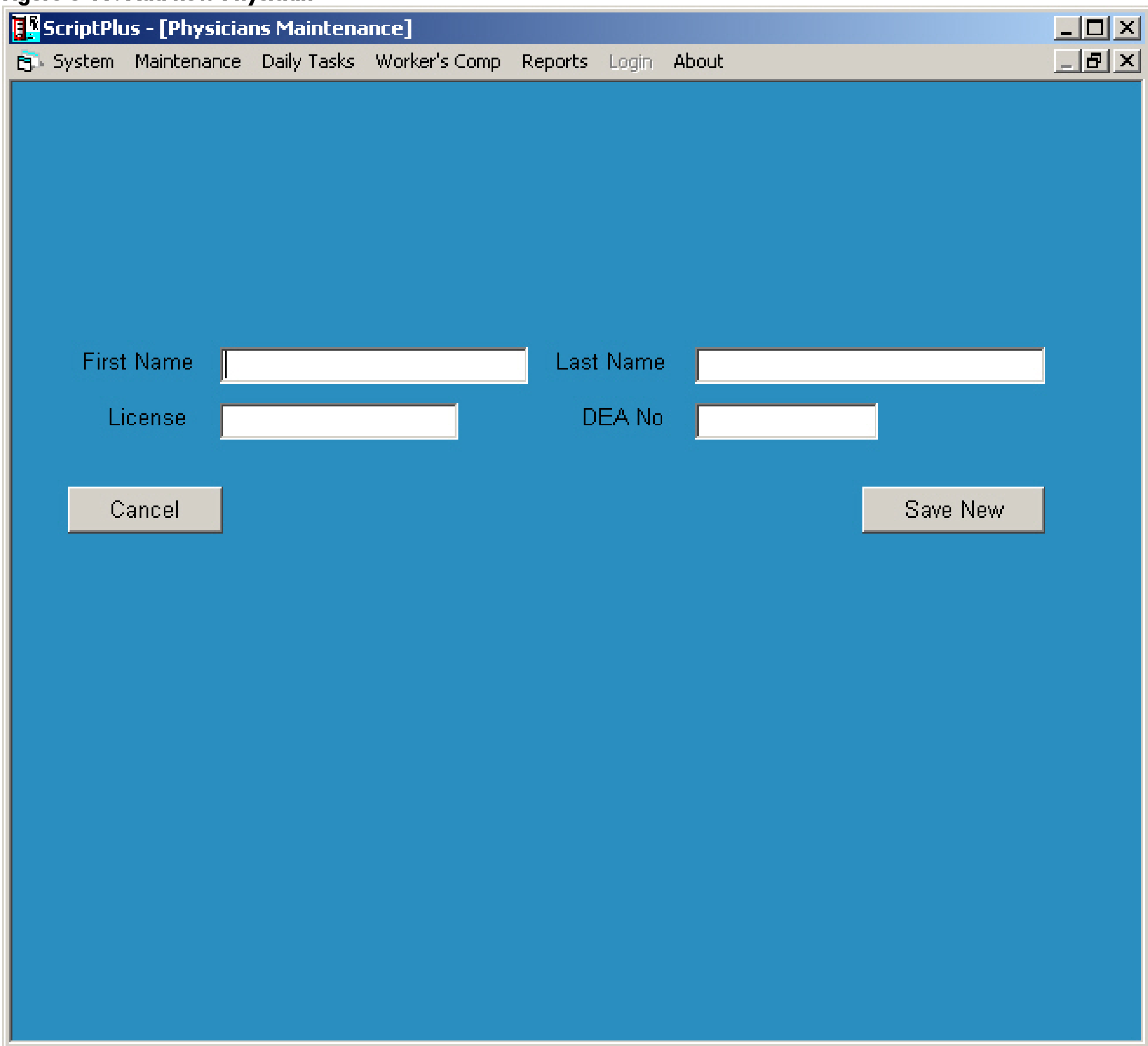
Figure 3-18: Physician list



Add a new Physician

1. To add a new Physician, click **Add**.
2. Complete the Physician information fields (see Figure 3-19):
3. When the information is complete, click **Save New**.

Figure 3-19: Add new Physician



First Name

Type the Physician's first name.

Last Name

Type the Physician's last name.

License

Type the Physician's state Medical License number. This is required for reporting purposes.

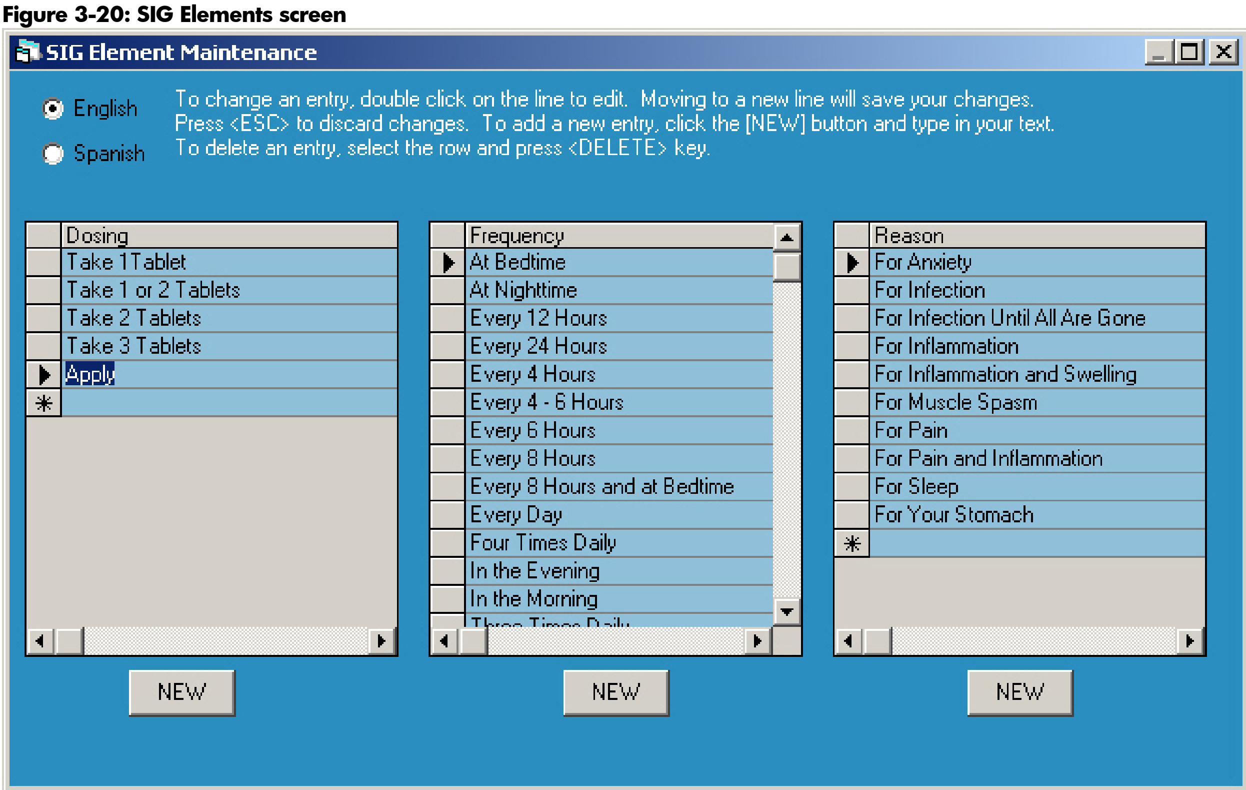
DEA No.

Type the Physician's Federal DEA License Number. This is required for adjudication and controlled drug reporting.

SIG Elements

The SIG Elements form allows you to add, change, or delete SIG Codes used in the SIG Builder Form. There are three SIG Element levels: **Dosing**, **Frequency**, and **Reason**. English and Spanish SIG Elements can be accessed by selecting the desired language.(see Figure 3-20).

Figure 3-20: SIG Elements screen



Change or Delete SIG Elements

1. To change a SIG Element, double-click on the line to edit the text. Moving to a new line will save your changes. Press <ESC> on your keyboard to discard changes.
2. To delete a SIG Element, select the entry row and press <Delete> on your keyboard.

Add a new SIG Element

1. Click **New** under the SIG Element level you wish to add (Dosing, Frequency, or Reason)
2. Type your SIG Element entry in the new row.
3. When your entry is completed, click in any row to save the new entry.

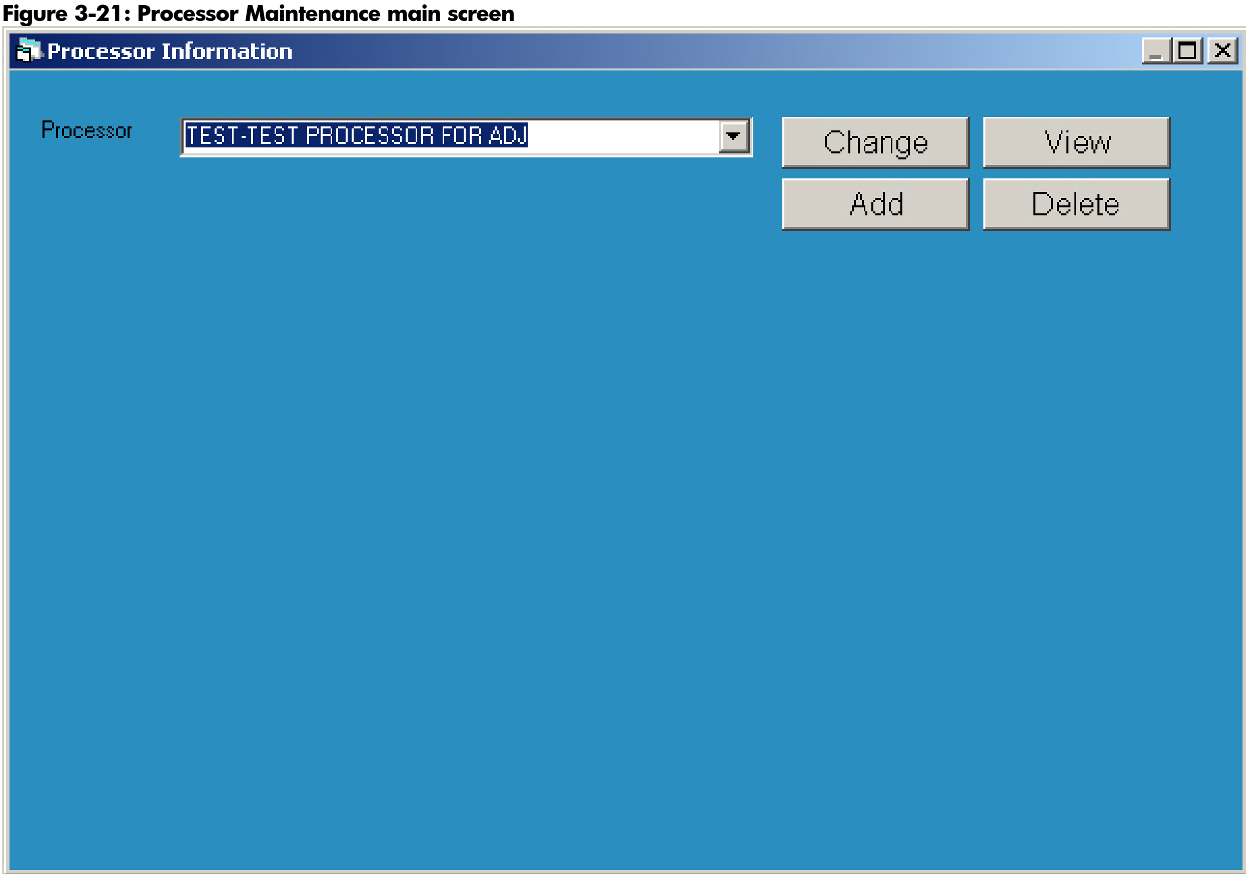
Processor Maintenance

The main Processor Maintenance screen contains a drop-down list of Processors, and offers four functions (see Figure 3-21):

- **Change** – to change Processor information
- **Add** – to add a new Processor
- **View** – to view Processor information

- **Delete** – to delete a Processor

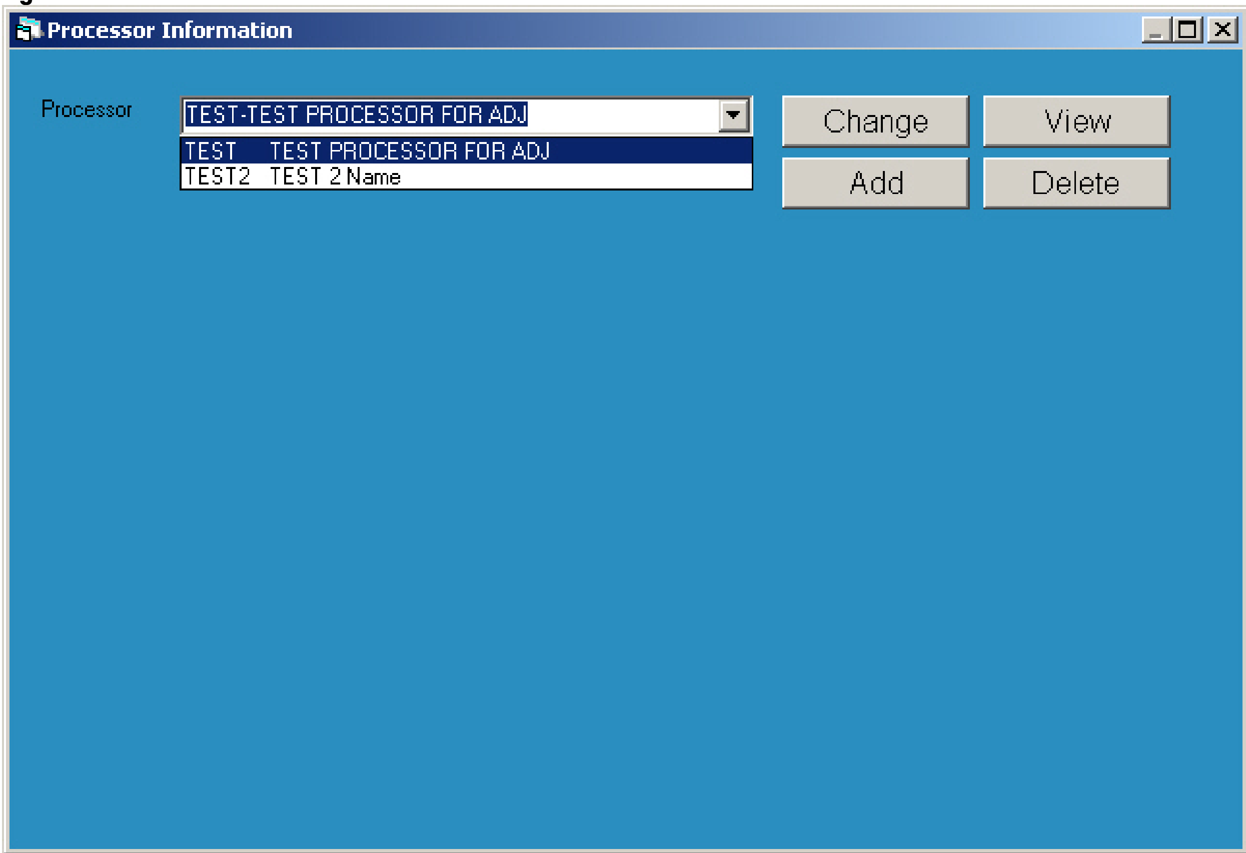
Figure 3-21: Processor Maintenance main screen



Change, View, or Delete Processor Information

To change, view, or delete Processor information, select the Processor name from the drop-down Processor list (see Figure 3-22). Then, click **Change, View, or Delete**.

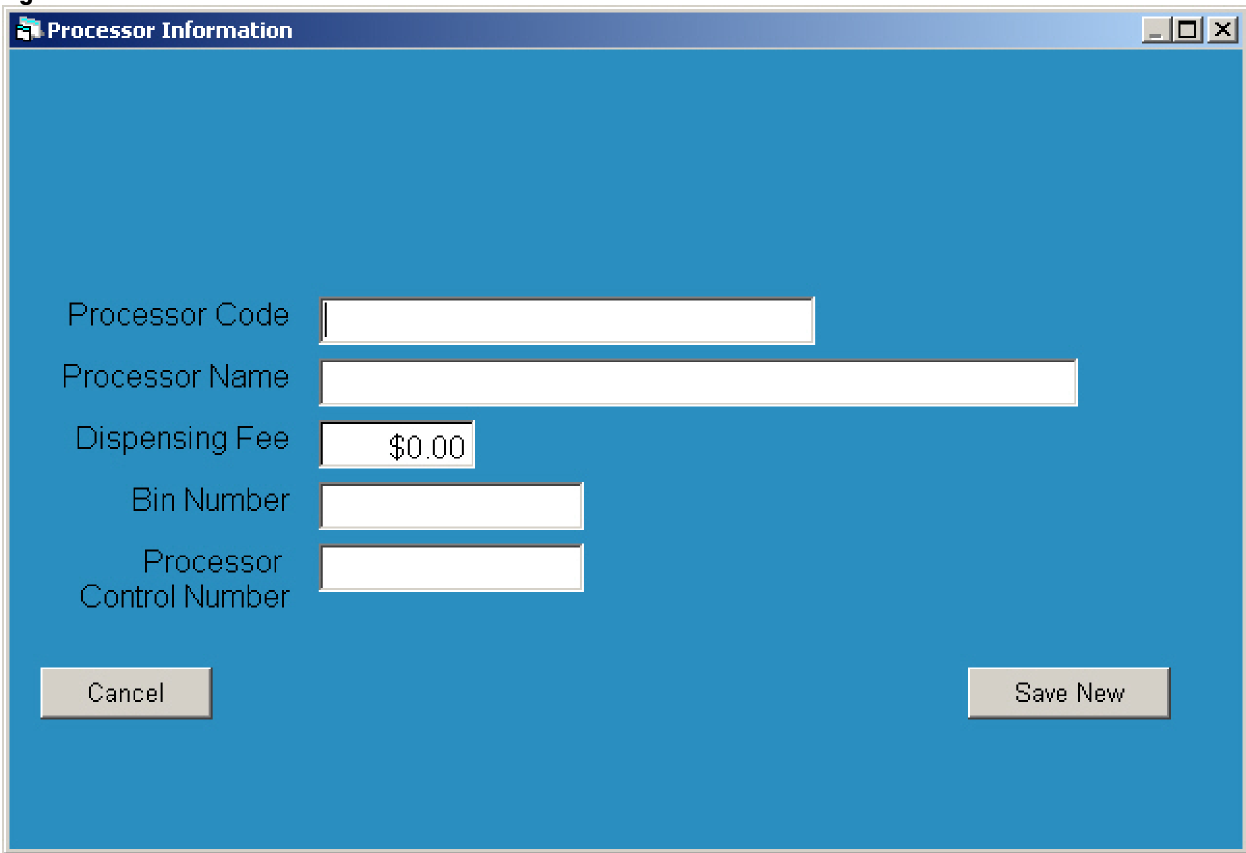
Figure 3-22: Processor list



Add a new Processor

1. To add a new Processor, click **Add**.
2. Complete the Processor information fields (see Figure 3-23):
3. When the information is complete, click **Save New**.

Figure 3-23: Add new Processor



Processor Code

Type a unique value in this field to identify the Processor.

Processor Name

Type the Processor name in this field.

Dispensing Fee

Type the contractual dispensing fee in this field.

Bin Number

When contracting with a Processor, your clinic will be provided with a Bin number. The adjudication software uses the Bin number to route prescription claims to the proper location. Type the Bin number in this field.

Processor Control Number

When contracting with a Processor, your clinic will be provided a Processor Control number. The adjudication software uses the Processor Control Number to route prescription claims to the proper location. Type the Processor Control Number in this field.

Chapter

4

The Daily Tasks Menu

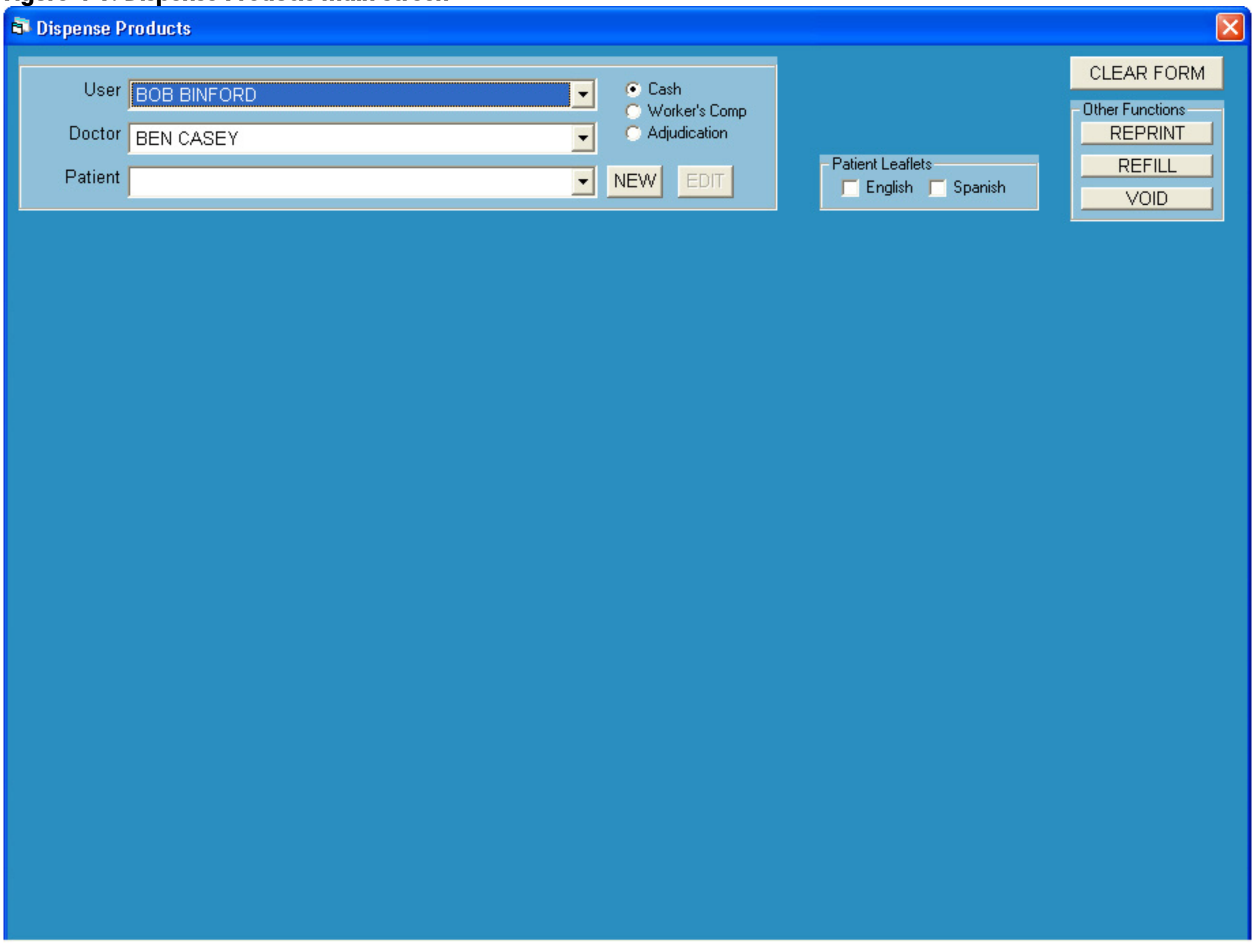
The ScriptPlus Daily Tasks menu offers a selection of functions:

- Dispense Products
- Refill Maintenance
- Receive Products
- Adjust Inventory
- Reprint a Label
- Void a Dispense
- Reverse Claim
- Purchase Orders

Dispense Products

Dispense products using the functions provided on the Dispense Products screen (see Figure 4-1).

Figure 4-1: Dispense Products main screen



Dispense Products Main screen

The Dispense Products screen offers the following fields:

User

If Use Security is selected in your System Setup, the User field will contain the name of the user who is logged into the system. If you are not using ScriptPlus security features, use the drop-down list to select the User name.

Doctor

Use the drop-down list to select a physician name.

Transaction type

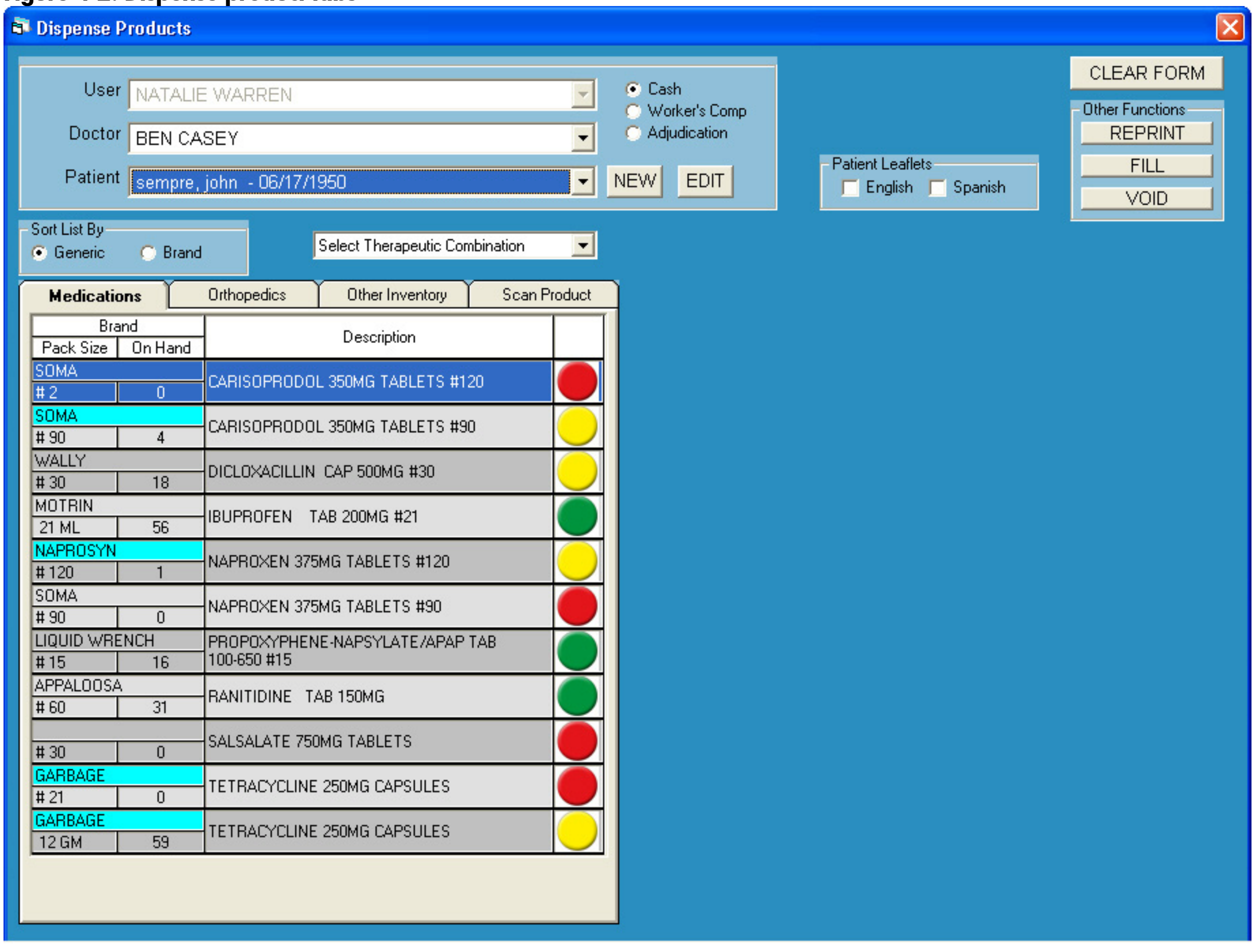
Select **Cash**, **Worker's Comp**, or **Adjudication**. Each transaction type is processed a bit differently, and dispensing instructions are included for each in this section.

Patient

Use the drop-down list to select a patient name, or click **New** to add a new patient. When a patient is selected, you may click **Edit** to change patient information.

When a patient is selected, the product tabs and Select Therapeutic Combination menu are available in the bottom portion of the screen (see Figure 4-2).

Figure 4-2: Dispense product tabs



Product Tabs

Each product tab displays a list of products available to dispense.

Medications

Orthopedics

Other Inventory

The product tabs provide a list of available medications, orthopedic products, and other inventory available to dispense. The list can be sorted by Brand or Generic name—select the **Sort List By** option above the product tabs.

NOTE: The red, yellow and green buttons indicate the inventory level of each product listed, according to the minimum and maximum On-Hand Quantities selected in Product Maintenance.

Red = Current quantity is 0

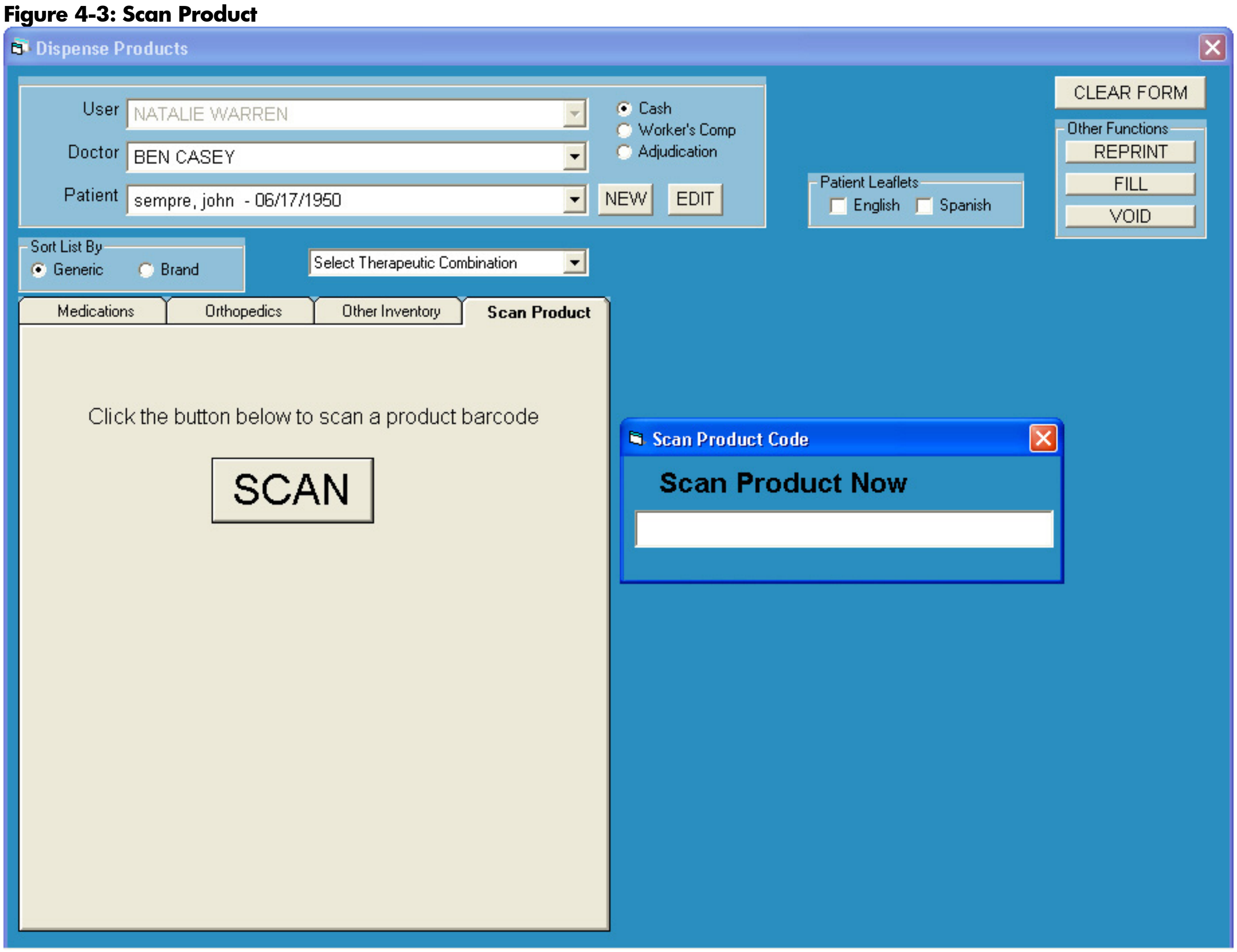
Yellow = Current quantity is below the minimum On-Hand Quantity selected

Green = Current quantity is at or above the minimum On-Hand Quantity selected

Scan Product

To dispense a product not currently in your inventory, select the Scan Product tab and click **SCAN**. Then, use a bar code scanner to scan the product code (see Figure 4-3).

Figure 4-3: Scan Product



Patient Leaflets

Select **English** or **Spanish** for PEL printing.

Clear Form button

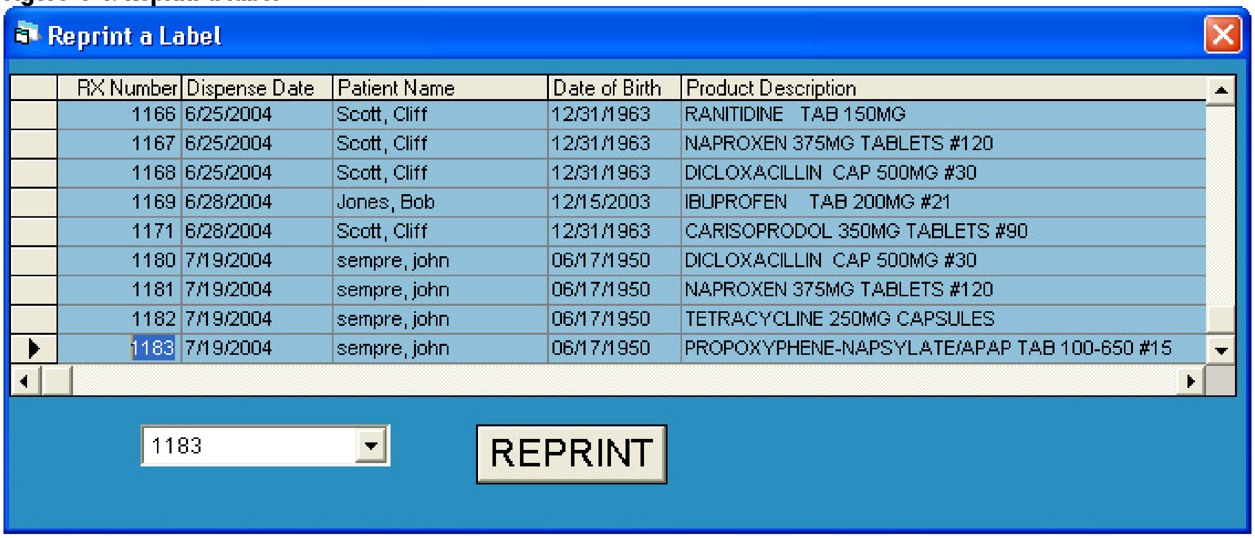
Click **Clear Form** to clear the screen and begin a new transaction.

Other Functions

The **Reprint**, **Fill**, and **Void** buttons allow you to perform routine dispensing functions quickly:

REPRINT allows you to reprint a label from any previous dispensing transaction (see Figure 4-4). Select the transaction by scrolling through the list, or from the drop-down RX ID list, and click **REPRINT**.

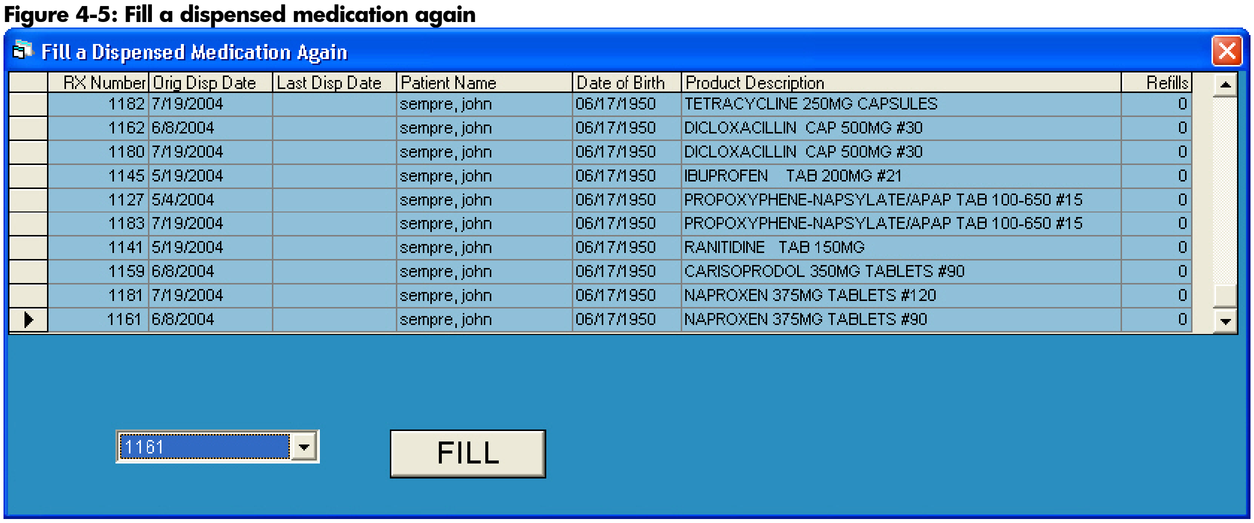
Figure 4-4: Reprint a label



RX Number	Dispense Date	Patient Name	Date of Birth	Product Description
1166	6/25/2004	Scott, Cliff	12/31/1963	RANITIDINE TAB 150MG
1167	6/25/2004	Scott, Cliff	12/31/1963	NAPROXEN 375MG TABLETS #120
1168	6/25/2004	Scott, Cliff	12/31/1963	DICLOXACILLIN CAP 500MG #30
1169	6/28/2004	Jones, Bob	12/15/2003	IBUPROFEN TAB 200MG #21
1171	6/28/2004	Scott, Cliff	12/31/1963	CARISOPRODOL 350MG TABLETS #90
1180	7/19/2004	sempre, john	06/17/1950	DICLOXACILLIN CAP 500MG #30
1181	7/19/2004	sempre, john	06/17/1950	NAPROXEN 375MG TABLETS #120
1182	7/19/2004	sempre, john	06/17/1950	TETRACYCLINE 250MG CAPSULES
1183	7/19/2004	sempre, john	06/17/1950	PROPOXYPHENE-NAPSYLATE/APAP TAB 100-650 #15

FILL allows you to refill a medication previously dispensed to the selected patient (see Figure 4-5). Select the product by scrolling through the list, or from the drop-down RX ID list, and click **FILL**.

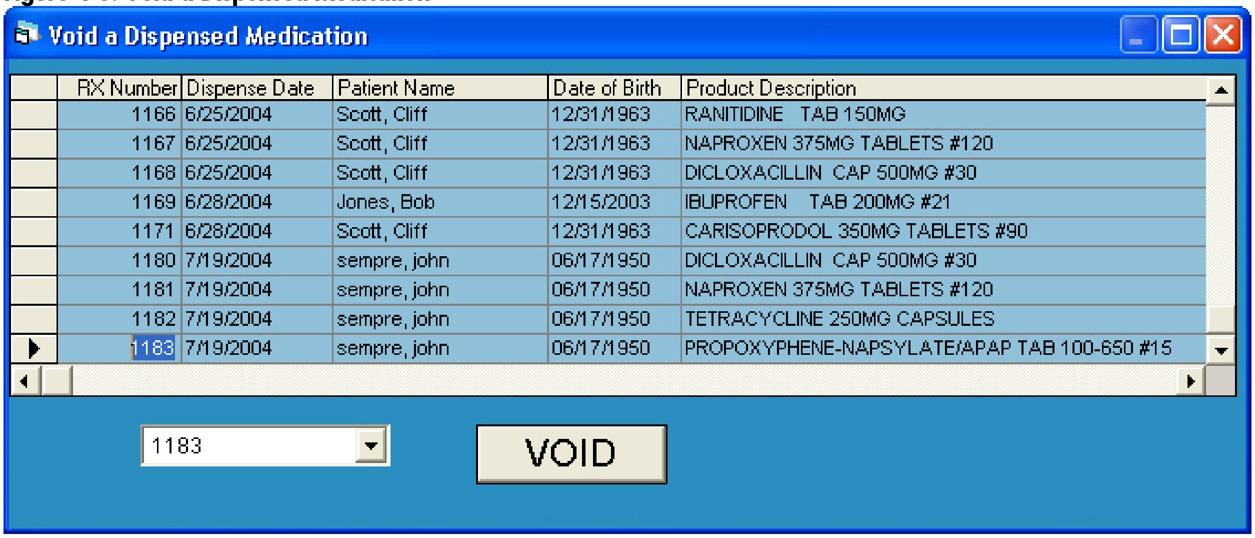
Figure 4-5: Fill a dispensed medication again



RX Number	Orig Disp Date	Last Disp Date	Patient Name	Date of Birth	Product Description	Refills
1182	7/19/2004		sempre, john	06/17/1950	TETRACYCLINE 250MG CAPSULES	0
1162	6/8/2004		sempre, john	06/17/1950	DICLOXACILLIN CAP 500MG #30	0
1180	7/19/2004		sempre, john	06/17/1950	DICLOXACILLIN CAP 500MG #30	0
1145	5/19/2004		sempre, john	06/17/1950	IBUPROFEN TAB 200MG #21	0
1127	5/4/2004		sempre, john	06/17/1950	PROPOXYPHENE-NAPSYLATE/APAP TAB 100-650 #15	0
1183	7/19/2004		sempre, john	06/17/1950	PROPOXYPHENE-NAPSYLATE/APAP TAB 100-650 #15	0
1141	5/19/2004		sempre, john	06/17/1950	RANITIDINE TAB 150MG	0
1159	6/8/2004		sempre, john	06/17/1950	CARISOPRODOL 350MG TABLETS #90	0
1181	7/19/2004		sempre, john	06/17/1950	NAPROXEN 375MG TABLETS #120	0
1161	6/8/2004		sempre, john	06/17/1950	NAPROXEN 375MG TABLETS #90	0

VOID allows you to void a dispensed medication (see Figure 4-6). Select the transaction by scrolling through the list, or from the drop-down RX ID list, and click **VOID**.

Figure 4-6: Void a Dispensed Medication



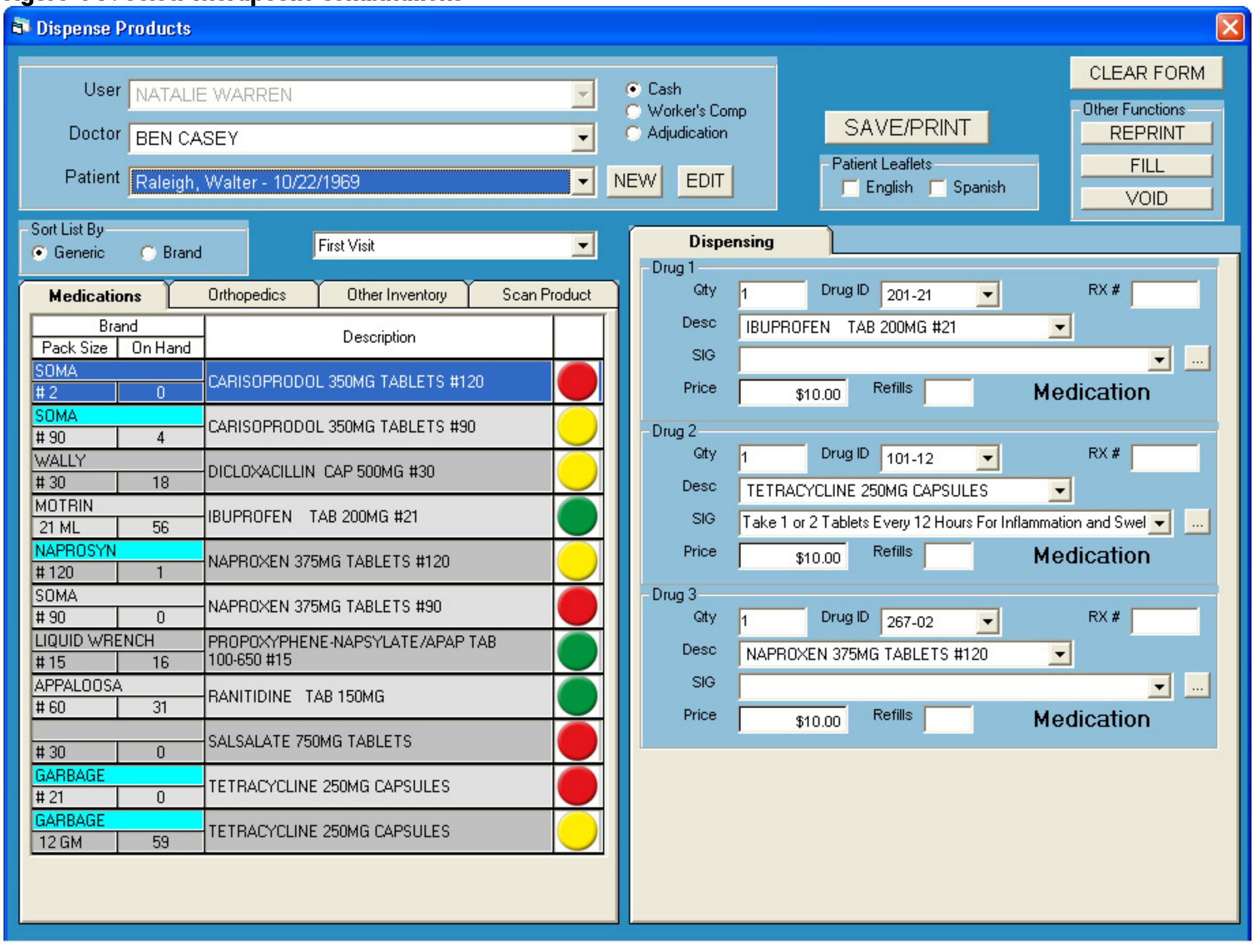
Dispensing Products - Cash

Use the drop-down menu of Therapeutic Combinations or select products from the product tabs to dispense to the patient.

Select Therapeutic Combinations

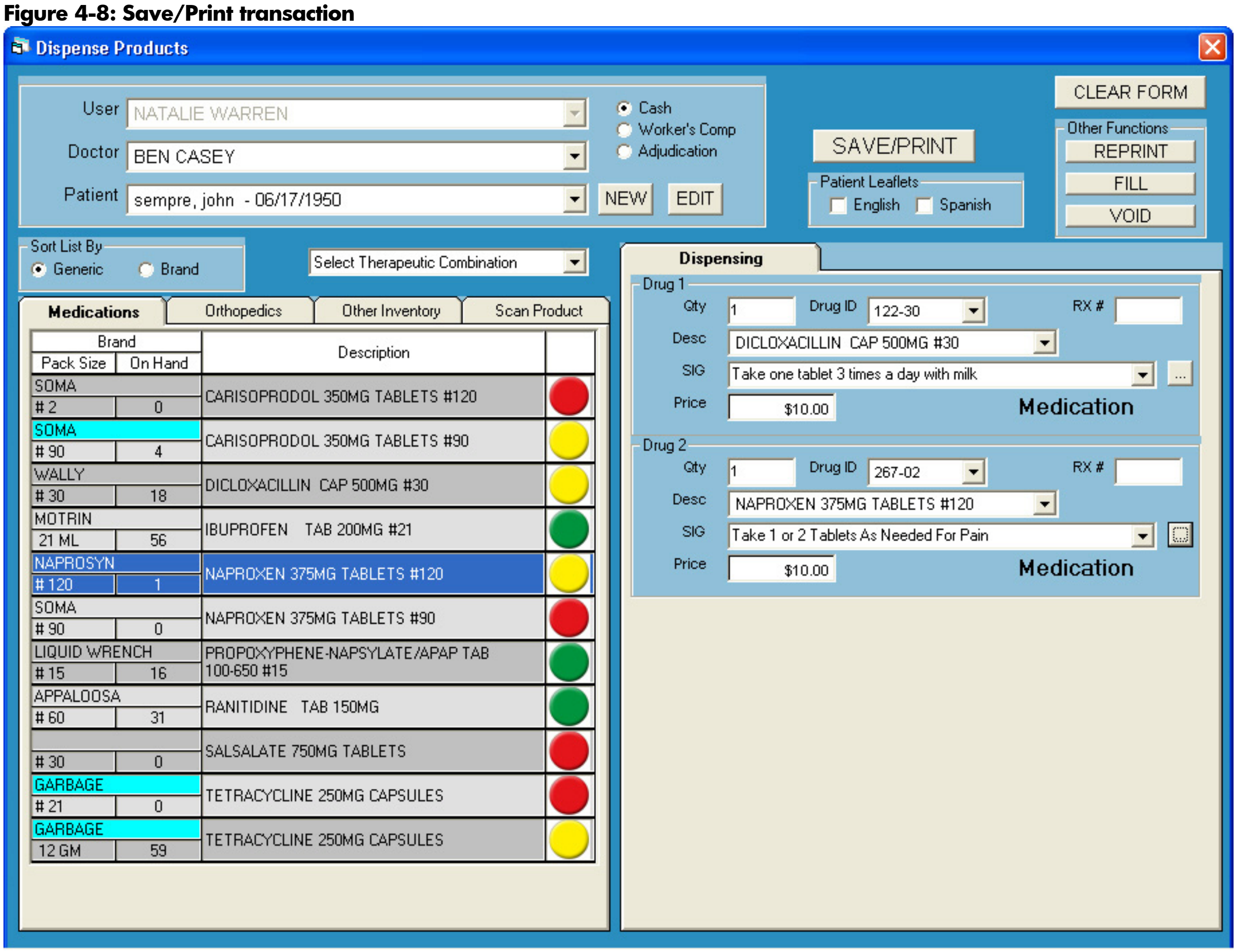
1. Use the drop-down menu to select a Therapeutic Combination. The combination products will display on a Dispensing tab. (see Figure 4-7).

Figure 4-7: Select Therapeutic Combinations



2. When you have selected the products to dispense (see Figure 4-8), click **SAVE/PRINT**. The product labels, PEL, and receipt will print and the transaction is complete.

Figure 4-8: Save/Print transaction



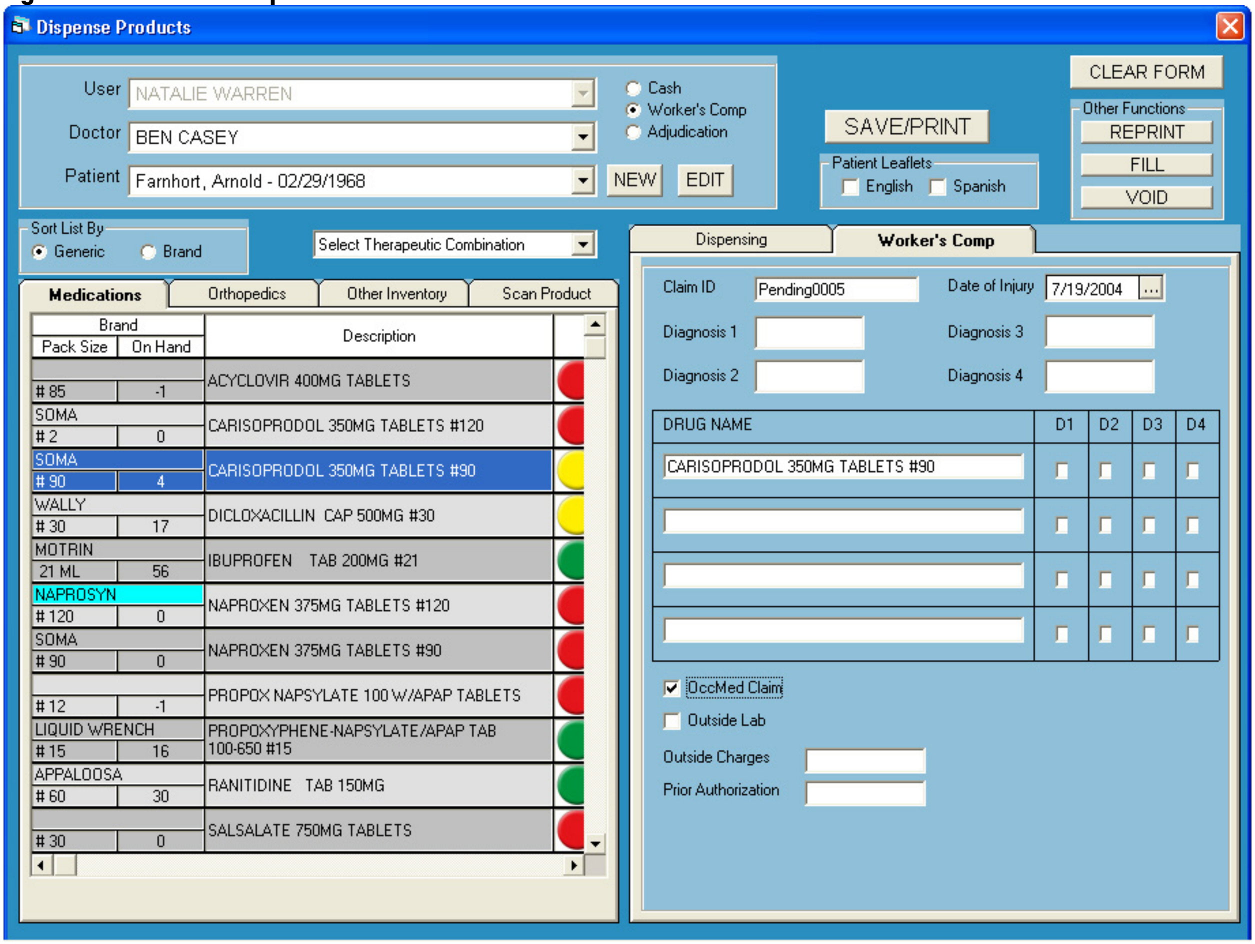
Dispensing Products – Workers Comp

Use the drop-down menu of Therapeutic Combinations or select products from the product tabs to dispense to the patient.

Select Therapeutic Combinations

1. Use the drop-down menu to select a Therapeutic Combination. The combination products will display on a Dispensing tab, as shown previously in figure 4-6.
2. In addition to the Dispensing tab, a Workers Comp tab will display (see figure 4-9).

Figure 4-9: Workers Comp tab



3. Complete the information according to Worker's Compensation regulations.
4. When you have selected the products to dispense and completed the required information, click **SAVE/PRINT**. The product labels, PEL, and receipt will print and the transaction is complete.

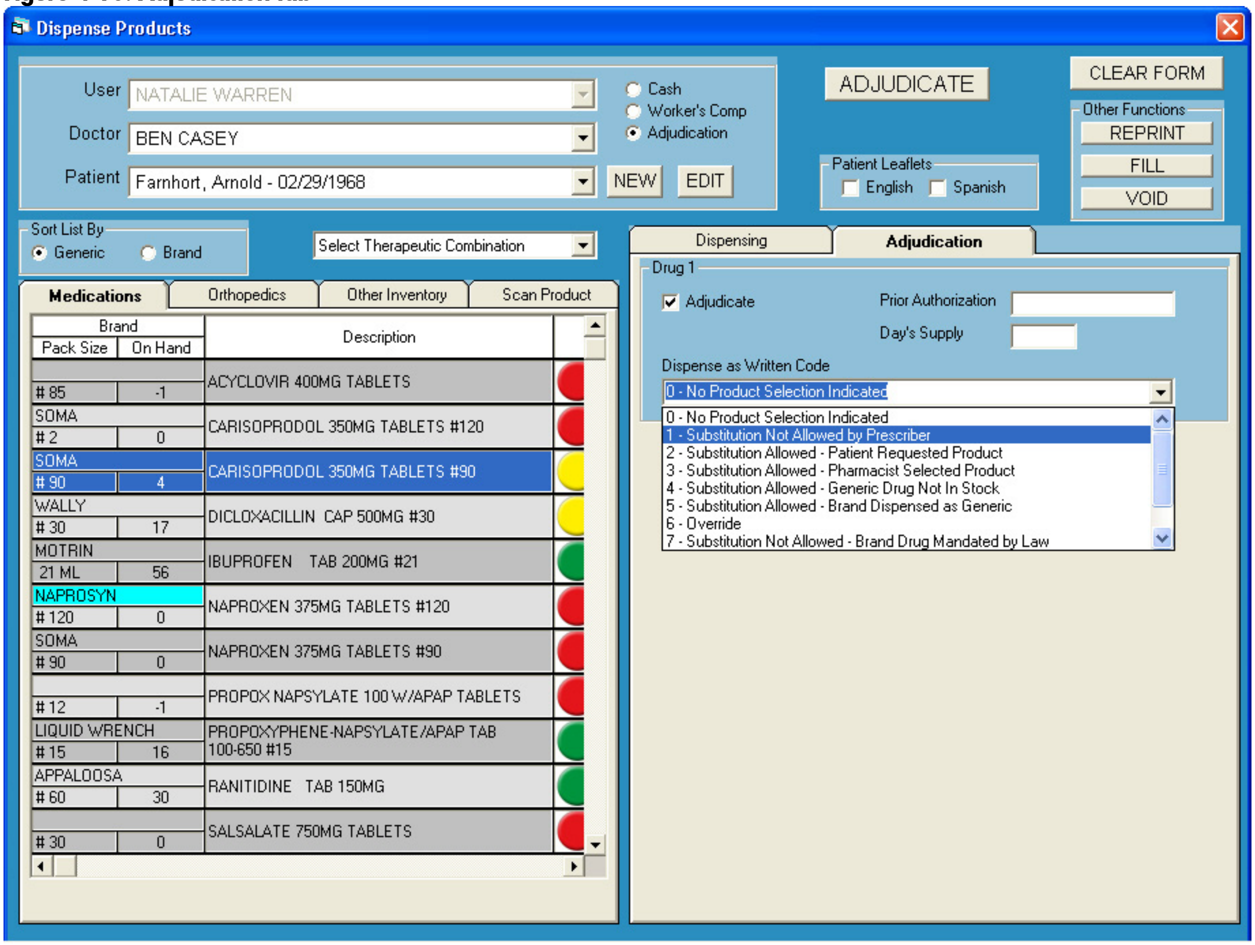
Dispensing Products – Adjudication

Use the drop-down menu of Therapeutic Combinations or select products from the product tabs to dispense to the patient.

Select Therapeutic Combinations

1. Use the drop-down menu to select a Therapeutic Combination. The combination products will display on a Dispensing tab, as shown previously in figure 4-6.
2. In addition to the Dispensing tab, an Adjudication tab will display (see figure 4-10).

Figure 4-10: Adjudication tab

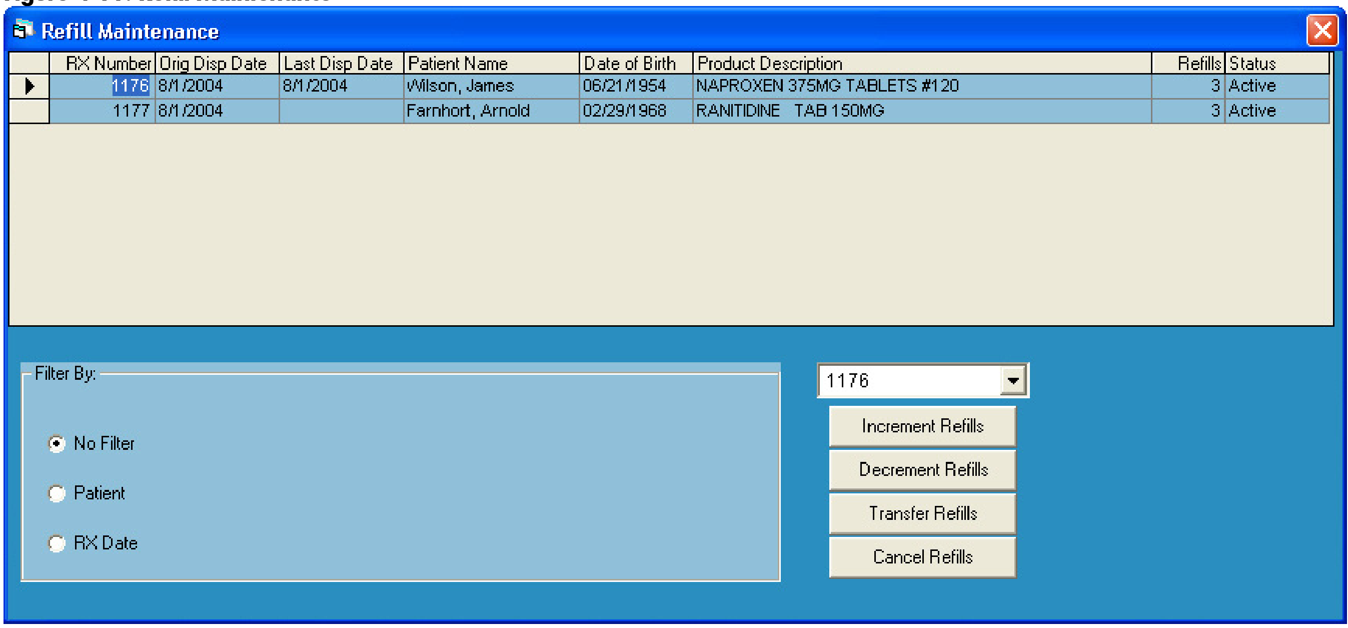


3. Complete the information as required for adjudication.
4. Click Adjudicate.

Refill Maintenance

The Refill Maintenance screen displays products that have been dispensed with refills authorized, and allows you to manage the refill status of those products (see figure 4-11).

Figure 4-11: Refill Maintenance



Select a **Filter By** option to sort the record display:

- No Filter
- Patient
- RX Date

Increase/Decrease Refill Authorization

1. Select a record line.
2. Click **Increment Refills** to increase the number of refills authorized, or Click **Decrement Refills** to decrease the number of refills authorized.

The number in the **Refills** column of the record will change.

Transfer Refills

1. Select a record line.
2. Click Transfer Refills.

The **Status** of the refill record will change.

Cancel Refills

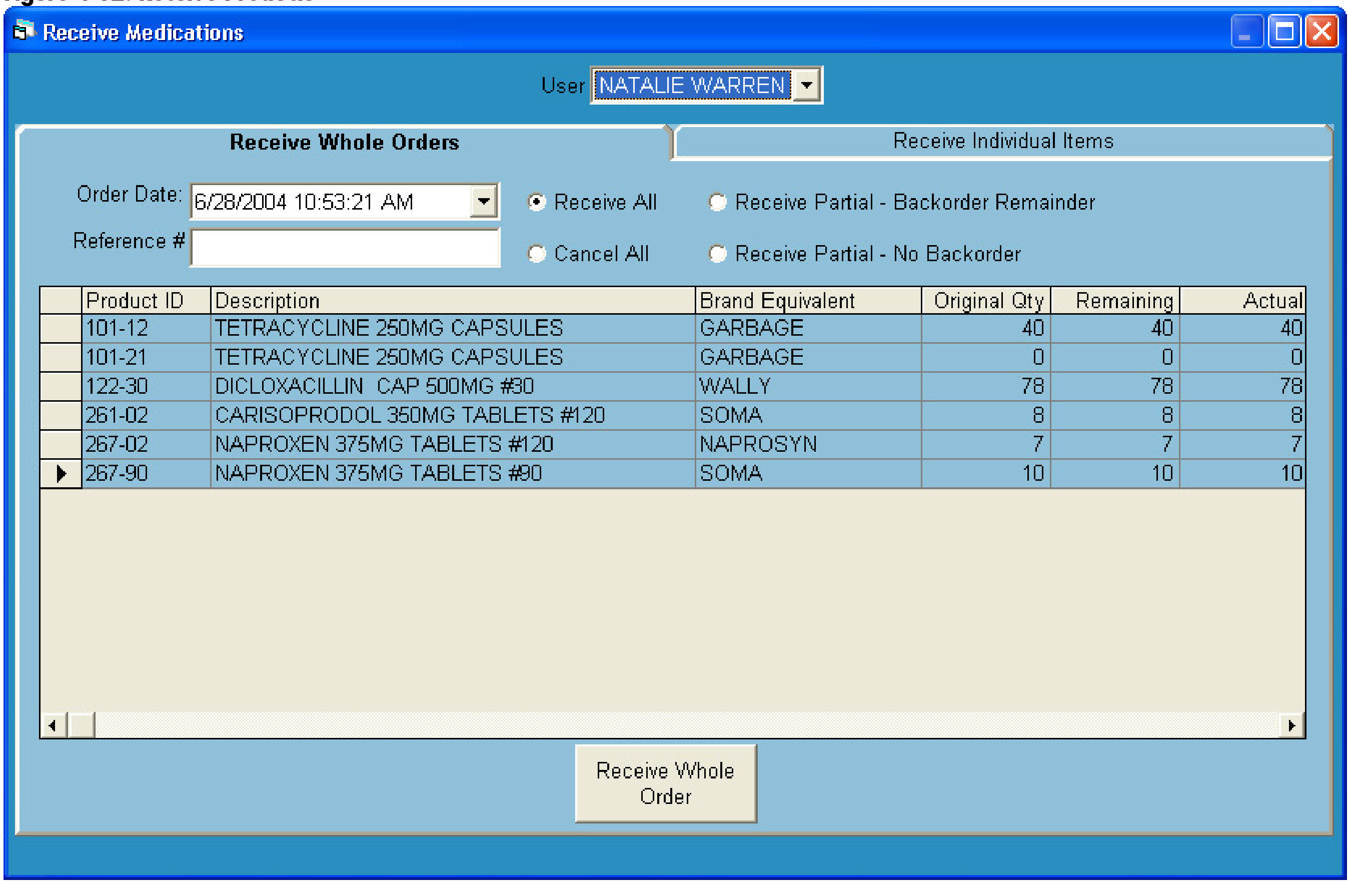
1. Select a record line
2. Click Cancel Refills

The **Status** of the refill record will change.

Receive Products

The Receive Products screen allows you to receive ordered products into your inventory (see figure 4-12).

Figure 4-12: Receive Products

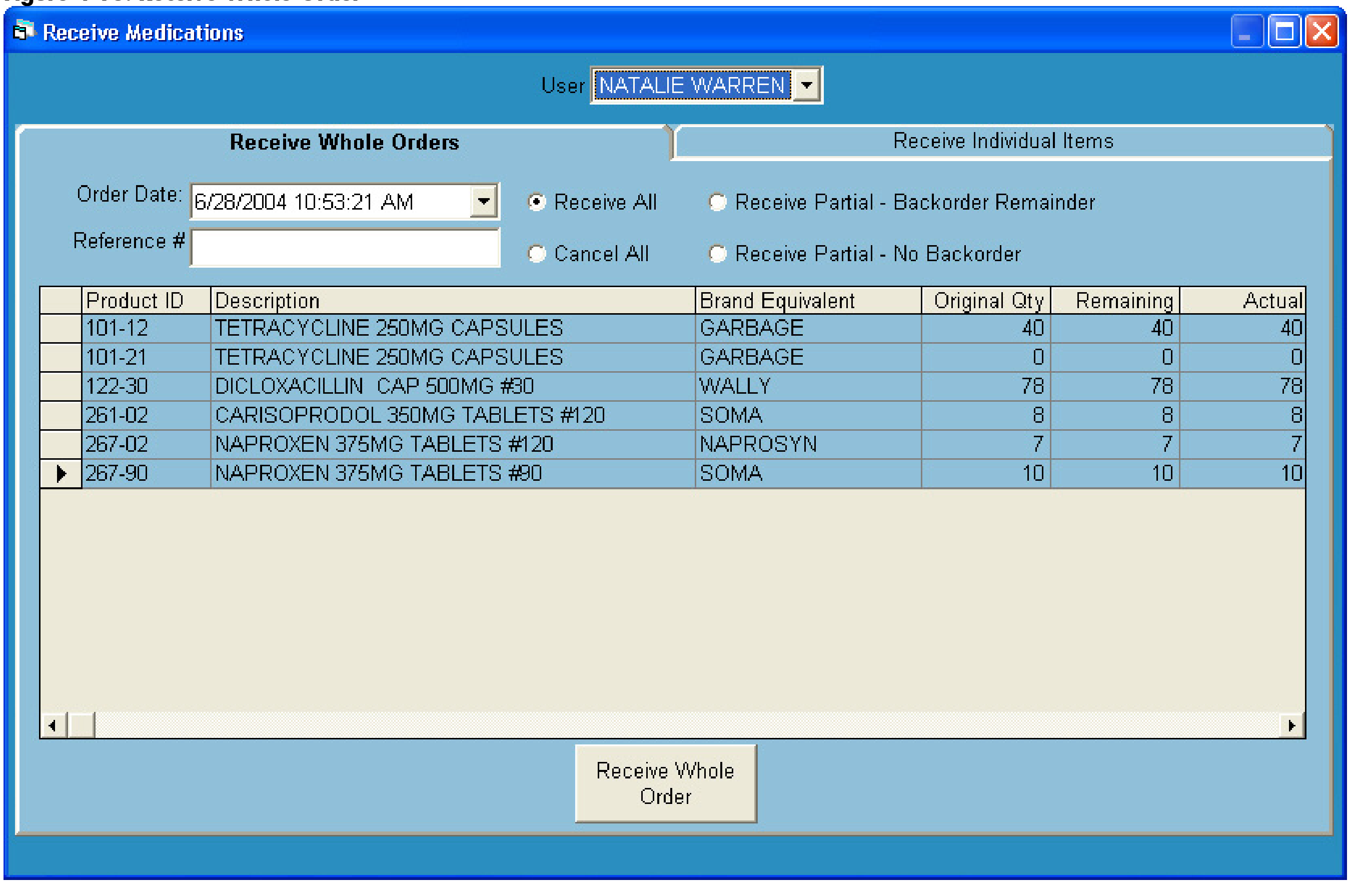


1. To begin receiving orders, select your **User** name from the drop-down list.
2. On the **Receive Whole Orders** tab, select the **Order Date** from the drop-down list, or type a **Reference #** in the field provided.

Receive Whole Order

If all products ordered are received, in the correct quantities, select **Receive All** and click **Receive Whole Order** (see figure 4-13).

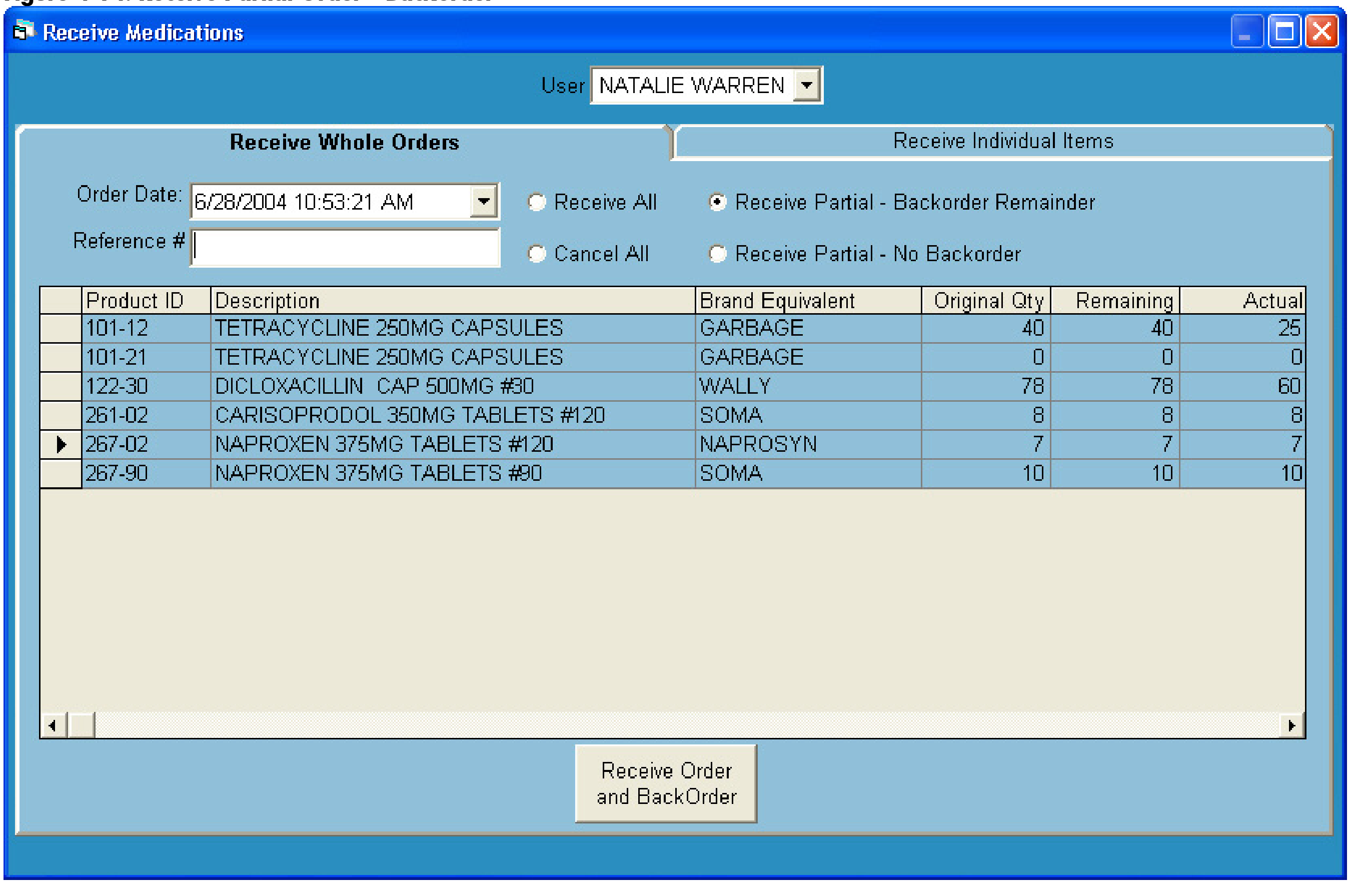
Figure 4-13: Receive Whole Order



Receive Partial Order – Backorder

If you have received only a portion of your order, and wish to backorder the remaining quantities, select **Receive Partial – Backorder Remainder**, adjust the quantities received in the **Actual** column of the record, and click **Receive Order and Backorder** (see figure 4-14).

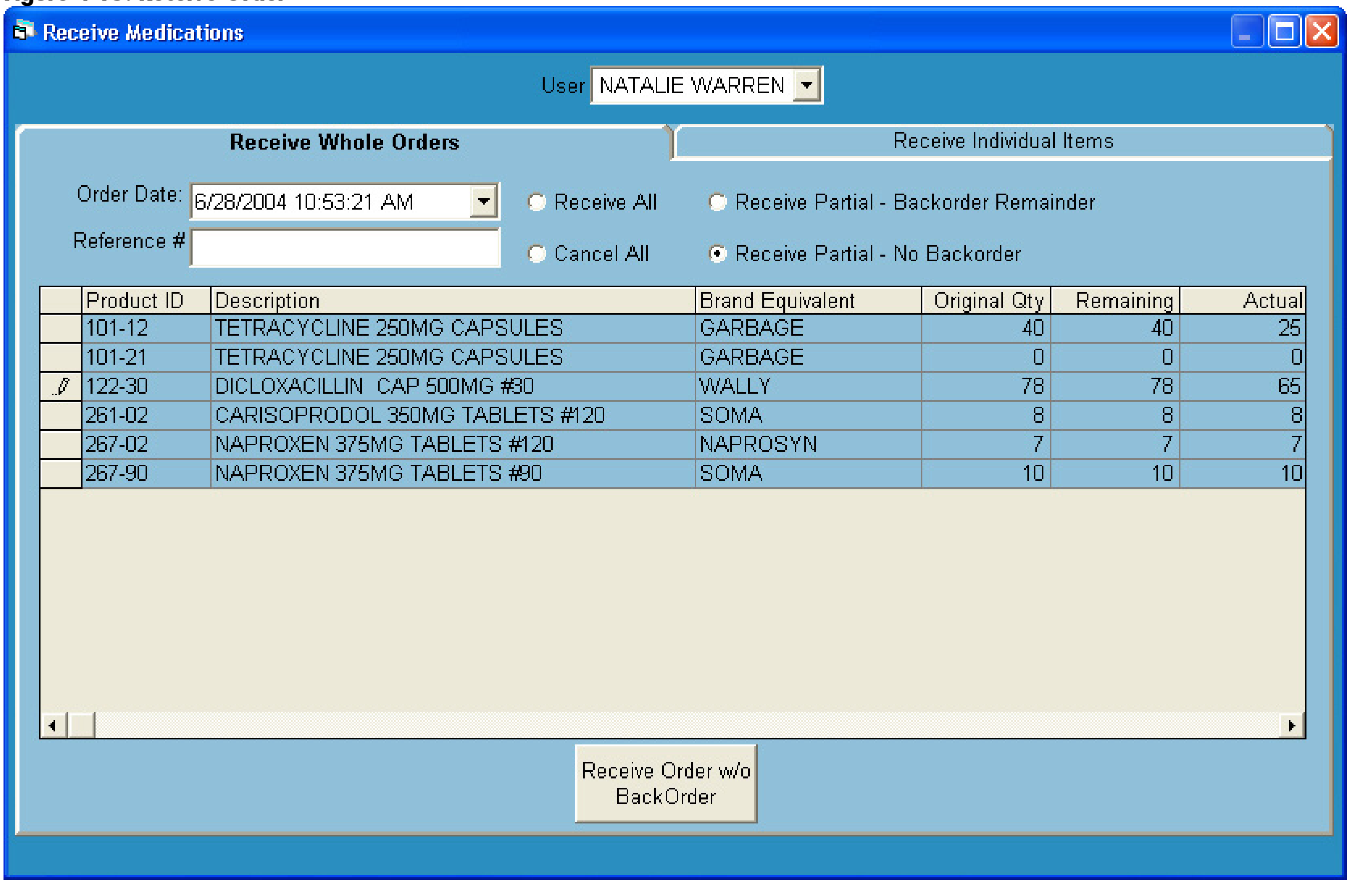
Figure 4-14: Receive Partial Order – Backorder



Receive Partial Order – No Backorder

If you have received only a portion of your order, but do not wish to backorder the remaining quantities, select **Receive Partial – No Backorder**, adjust the quantities received in the **Actual** column of the record, and click **Receive Order w/o Backorder** (see figure 4-15).

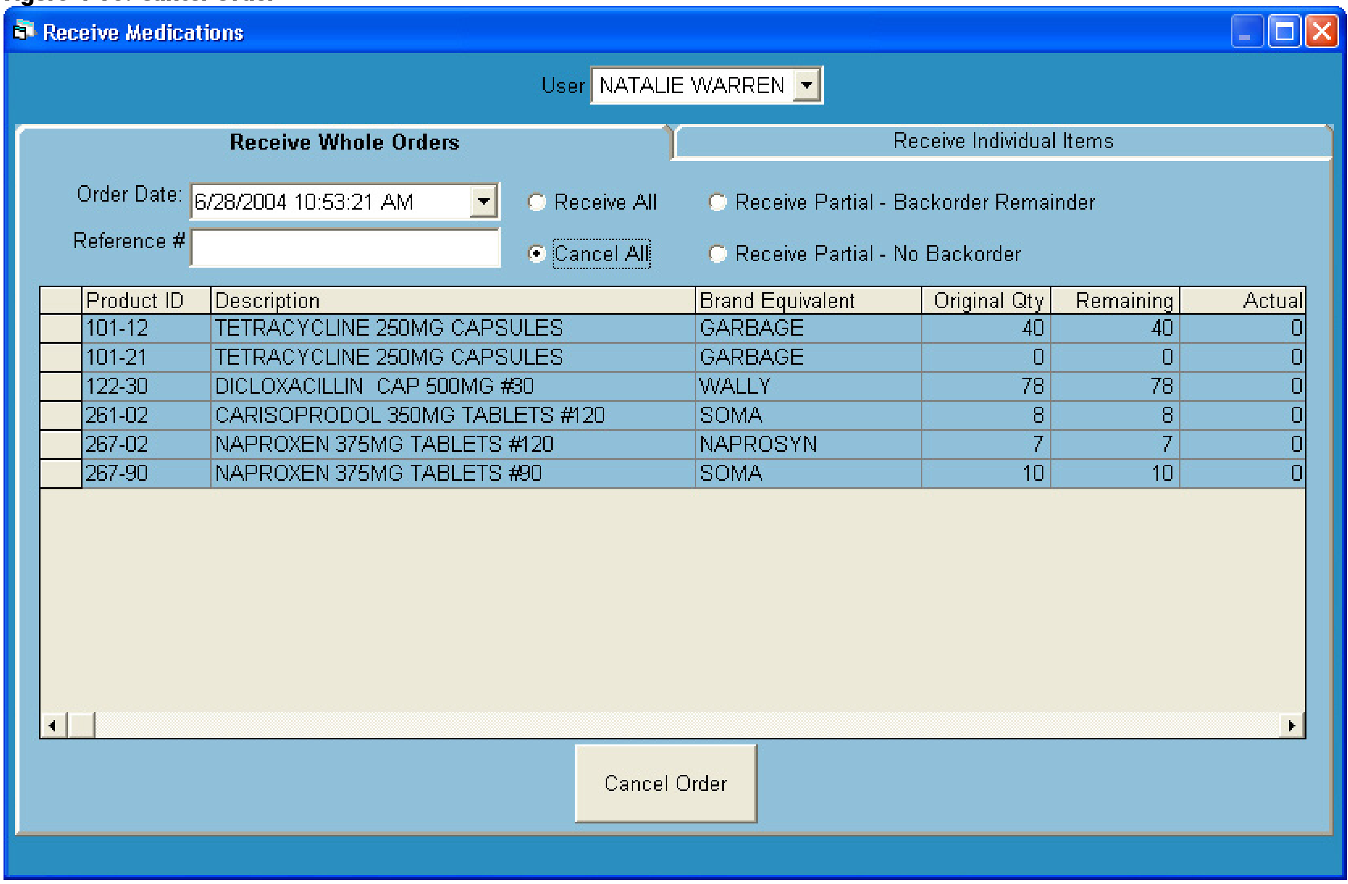
Figure 4-15: Receive Order



Cancel Order

To cancel an entire order, select **Cancel All** and click **Cancel Order** (see figure 4-16).

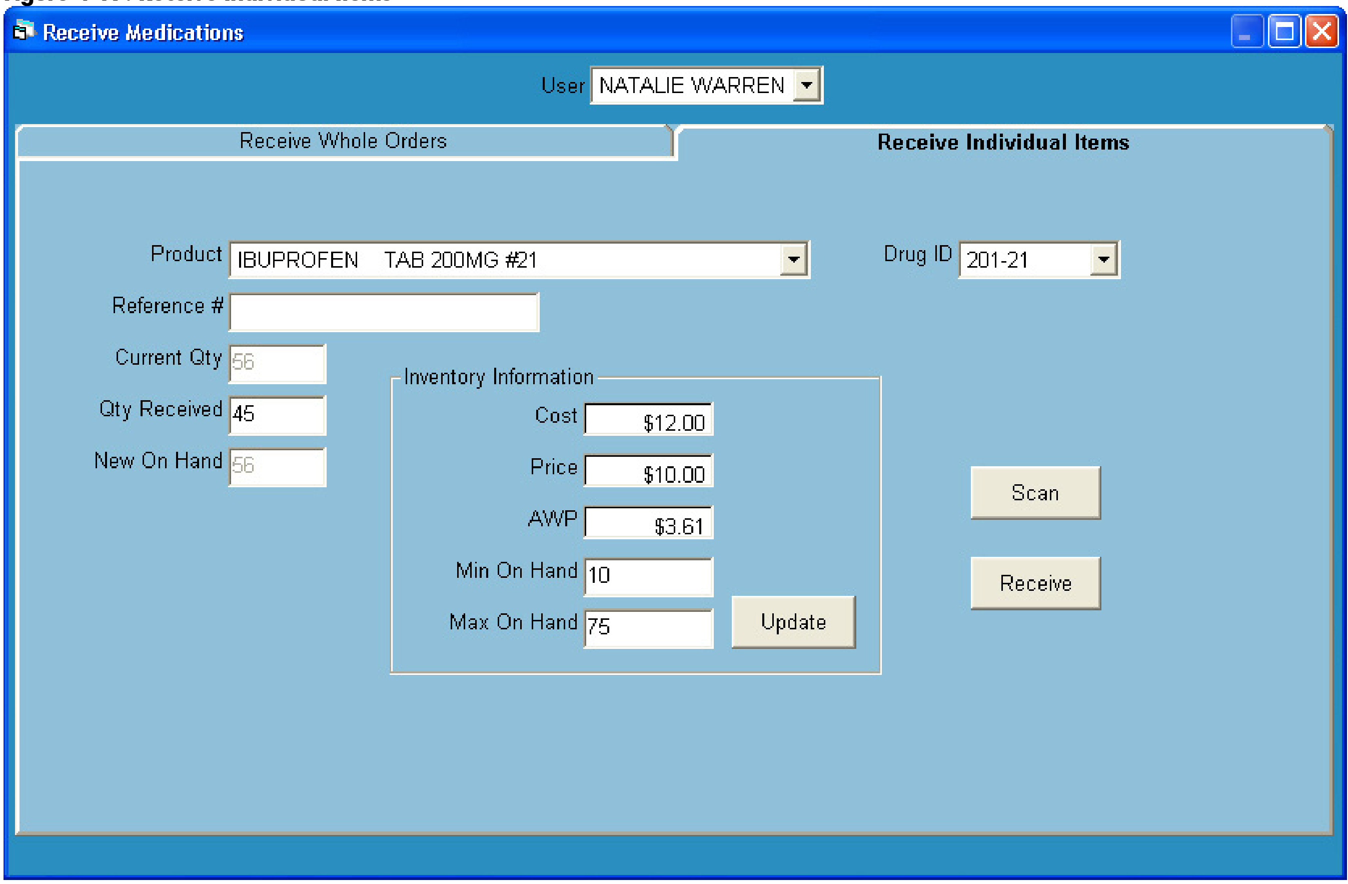
Figure 4-16: Cancel Order



Receive Individual Items

If you receive products for which you did not initiate a purchase order, and wish to submit the products into your inventory, click the **Receive Individual Items** tab (see figure 4-17).

Figure 4-17: Receive Individual Items

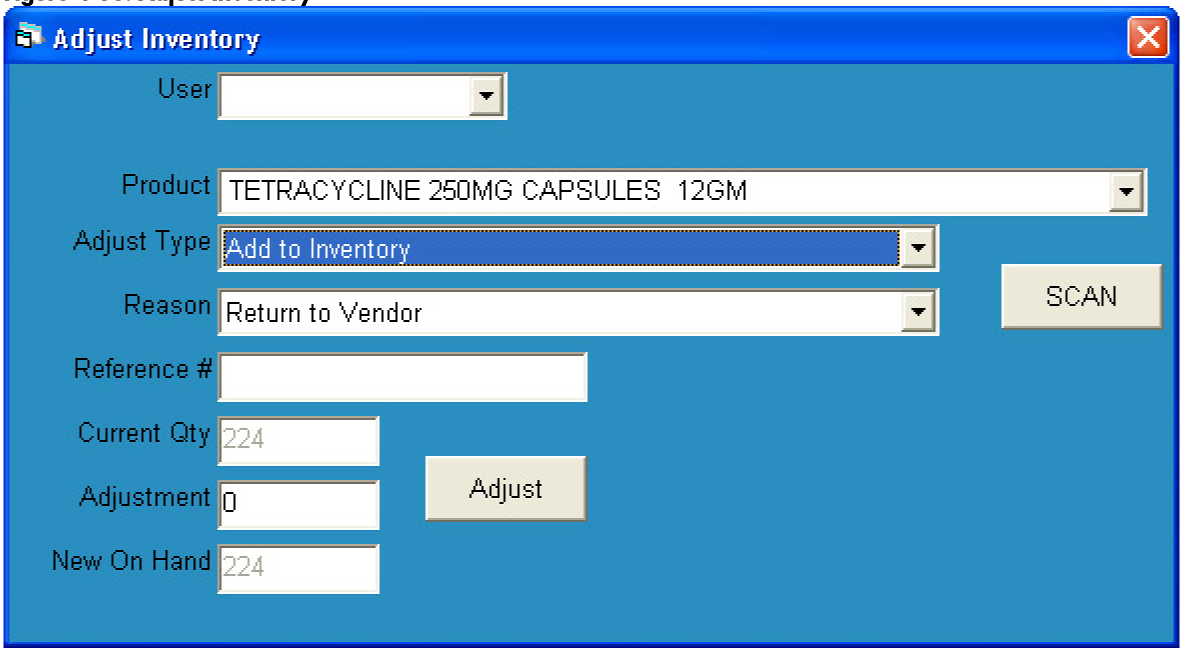


1. Select the **Product** or **Drug ID** from the drop-down lists, or click **Scan** to identify the product received by using a bar code scanner.
2. Enter the quantity received in the **Qty Received** field.
3. If necessary, make adjustments to the **Inventory Information** fields and click **Update**.
4. When all information is completed, click **Receive**.

Adjust Inventory

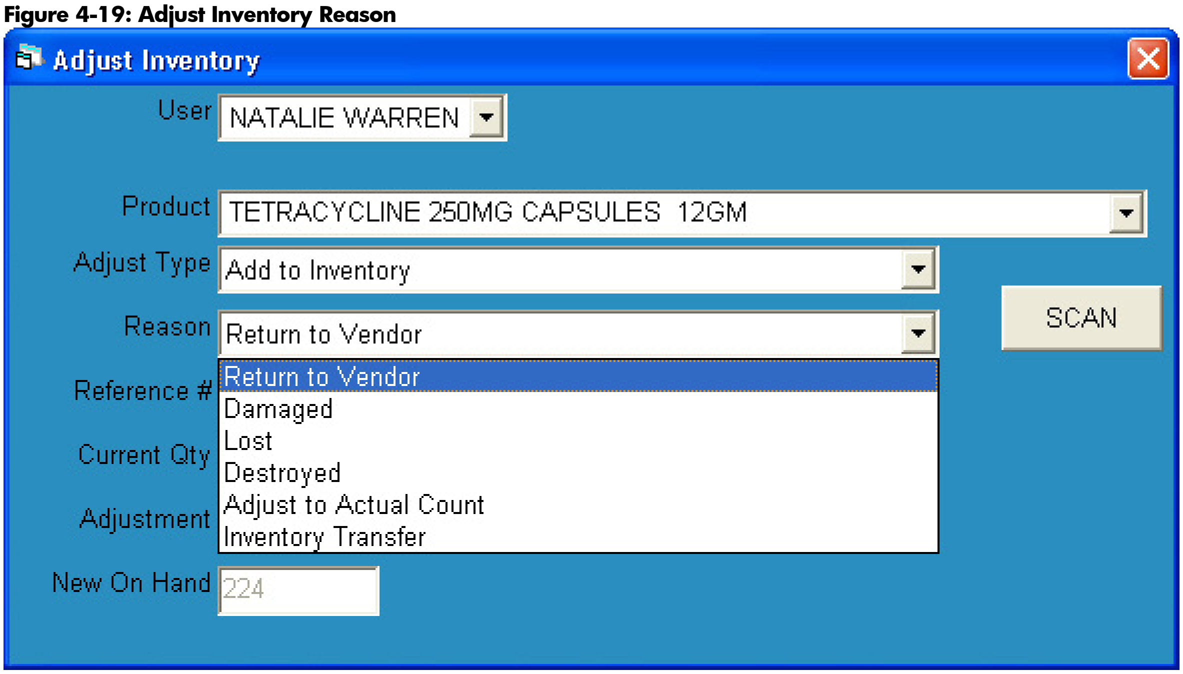
The Adjust Inventory screen allows you to increase or decrease product inventory count for reasons other than purchasing or dispensing (see figure 4-18).

Figure 4-18: Adjust Inventory



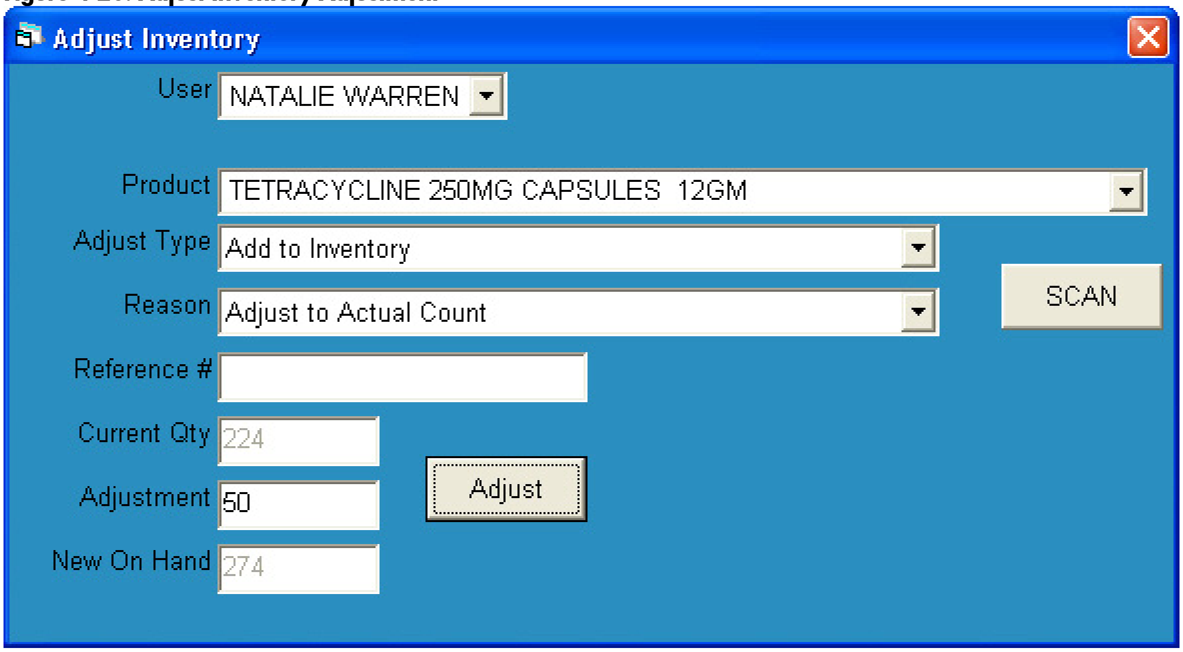
1. To begin using the Adjust Inventory function, select your **User** name from the drop-down list.
2. Select the product name from the **Product** drop-down list, or click **Scan** to use a bar code scanner.
3. Select either **Add to Inventory** or **Subtract from Inventory** from the **Adjust Type** drop-down list.
4. Select a Reason from the drop-down list (see figure 4-19).

Figure 4-19: Adjust Inventory Reason



5. Type the adjustment quantity in the **Adjustment** field and click **Adjust** (see figure 4-20).

Figure 4-20: Adjust Inventory Adjustment

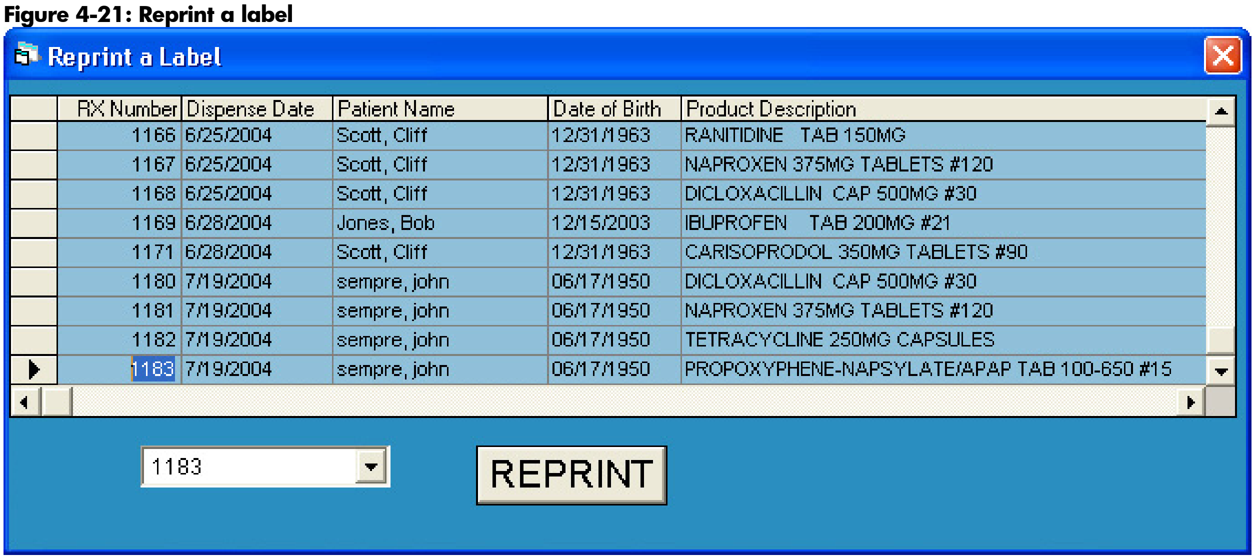


The adjusted quantity is reflected in the **New On Hand** field.

Reprint a Label

The Reprint a Label screen allows you to reprint a label from any previous dispensing transaction (see Figure 4-21). Select the transaction by scrolling through the list, or from the drop-down RX ID list, and click **REPRINT**.

Figure 4-21: Reprint a label

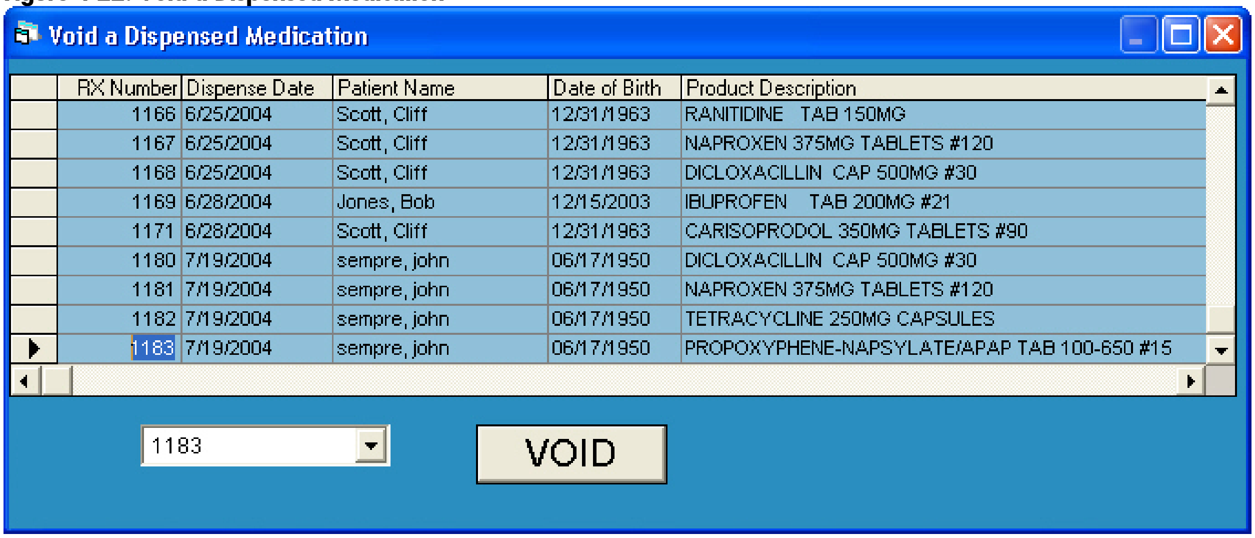


RX Number	Dispense Date	Patient Name	Date of Birth	Product Description
1166	6/25/2004	Scott, Cliff	12/31/1963	RANITIDINE TAB 150MG
1167	6/25/2004	Scott, Cliff	12/31/1963	NAPROXEN 375MG TABLETS #120
1168	6/25/2004	Scott, Cliff	12/31/1963	DICLOXACILLIN CAP 500MG #30
1169	6/28/2004	Jones, Bob	12/15/2003	IBUPROFEN TAB 200MG #21
1171	6/28/2004	Scott, Cliff	12/31/1963	CARISOPRODOL 350MG TABLETS #90
1180	7/19/2004	sempre, john	06/17/1950	DICLOXACILLIN CAP 500MG #30
1181	7/19/2004	sempre, john	06/17/1950	NAPROXEN 375MG TABLETS #120
1182	7/19/2004	sempre, john	06/17/1950	TETRACYCLINE 250MG CAPSULES
1183	7/19/2004	sempre, john	06/17/1950	PROPOXYPHENE-NAPSYLATE/APAP TAB 100-650 #15

Void a Dispense

The Void a Dispense screen allows you to void a dispensed medication (see Figure 4-22). Select the transaction by scrolling through the list, or from the drop-down RX ID list, and click **VOID**.

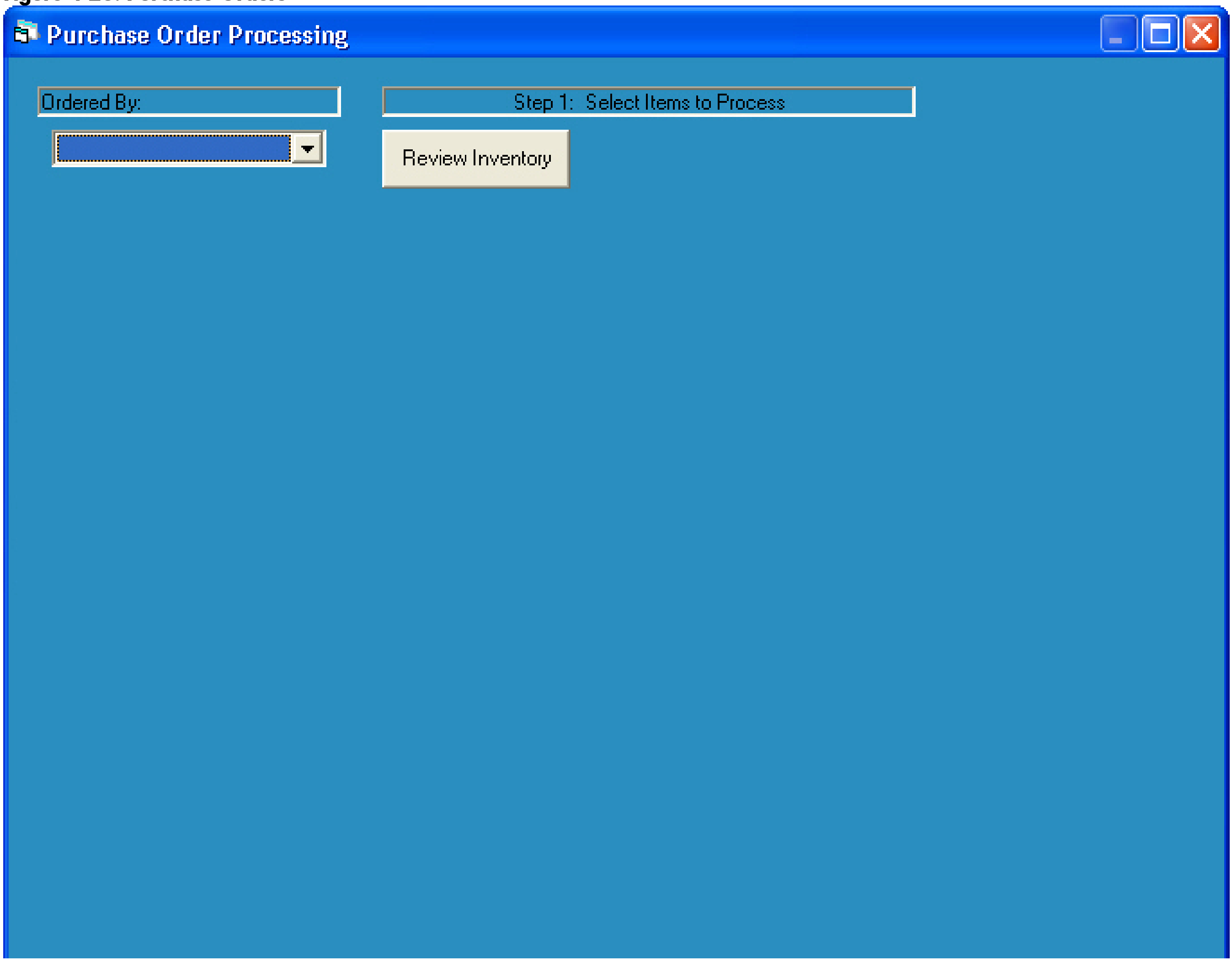
Figure 4-22: Void a Dispensed Medication



Purchase Orders

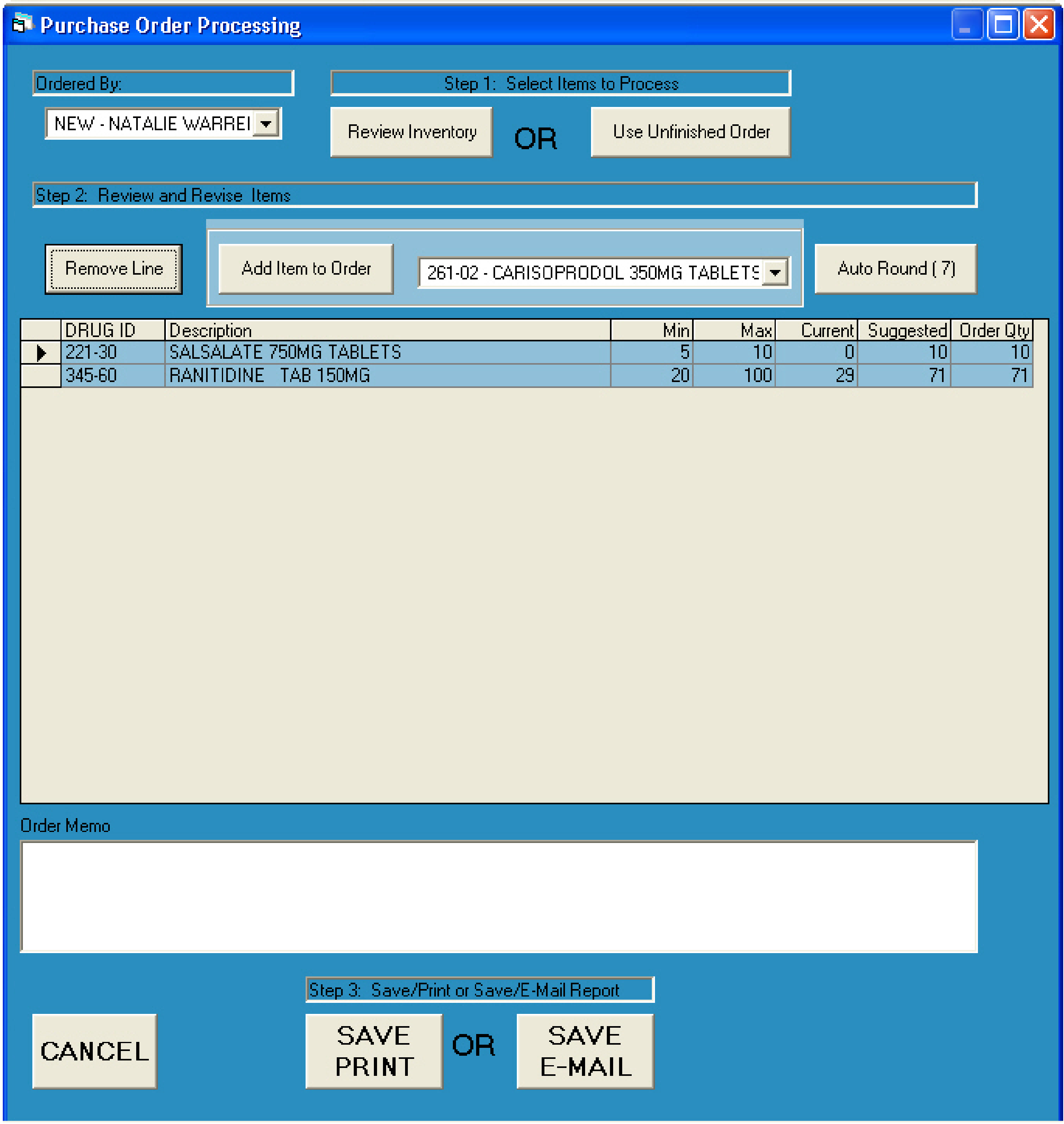
The Purchase Order screen allows you to create purchase orders for products (see figure 4-23).

Figure 4-23: Purchase Orders



1. To begin creating a purchase order, select your **User** name from the drop-down list.
2. Click **Review Inventory**.
3. The product review lists products that should be ordered (see figure 4-24).

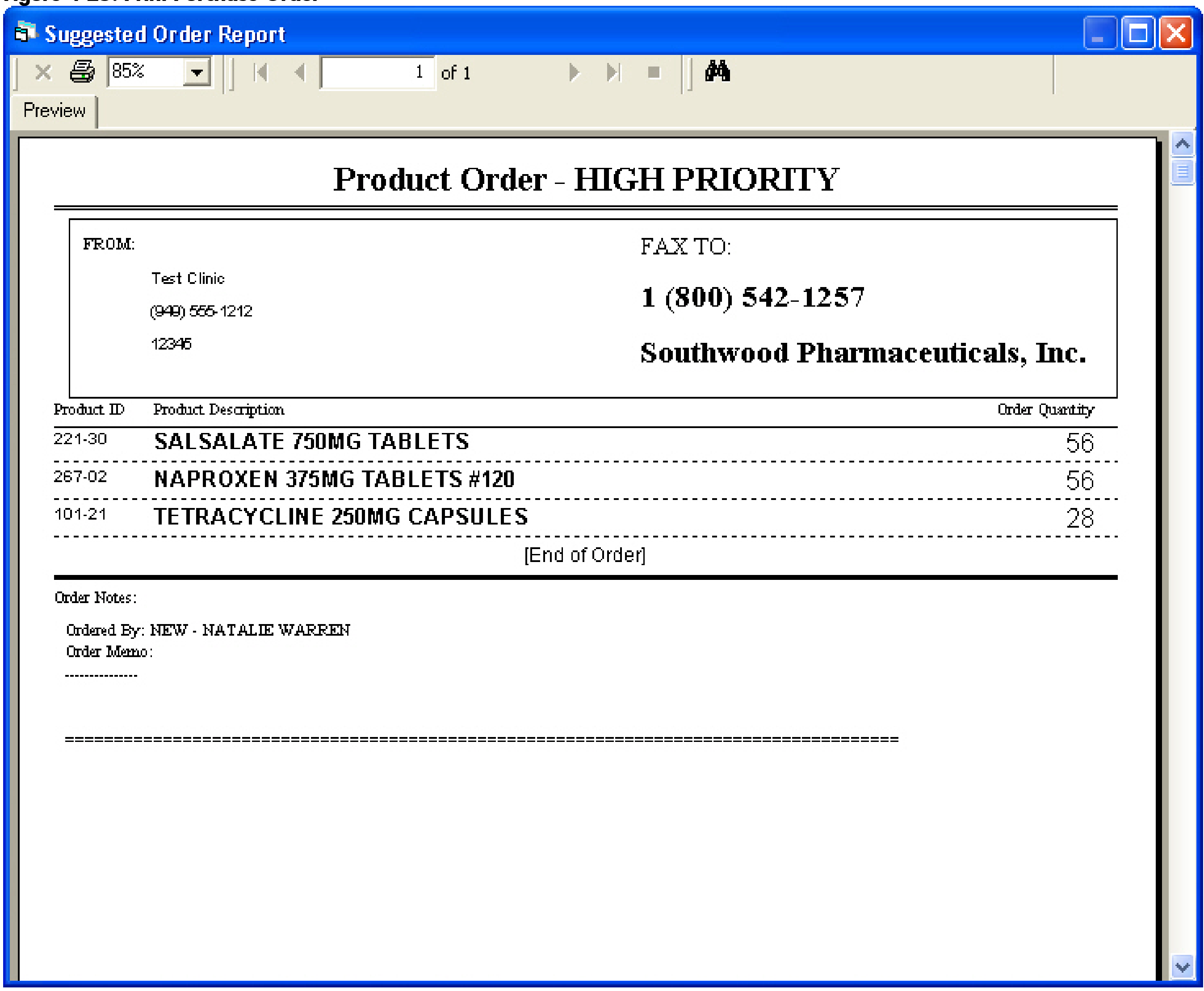
Figure 4-24: Purchase Order Review Inventory



4. To remove a product from the order, select the product line and click **Remove Line**.
   To add a product, select a product from the drop-down product list and click **Add Item to Order**.
5. Make any necessary adjustments to the order quantity in the **Order Qty** field.
   You can click **Auto Round** to set quantities to the rounded amount designated in your System Setup.
6. Type any order instructions in the **Order Memo** field.

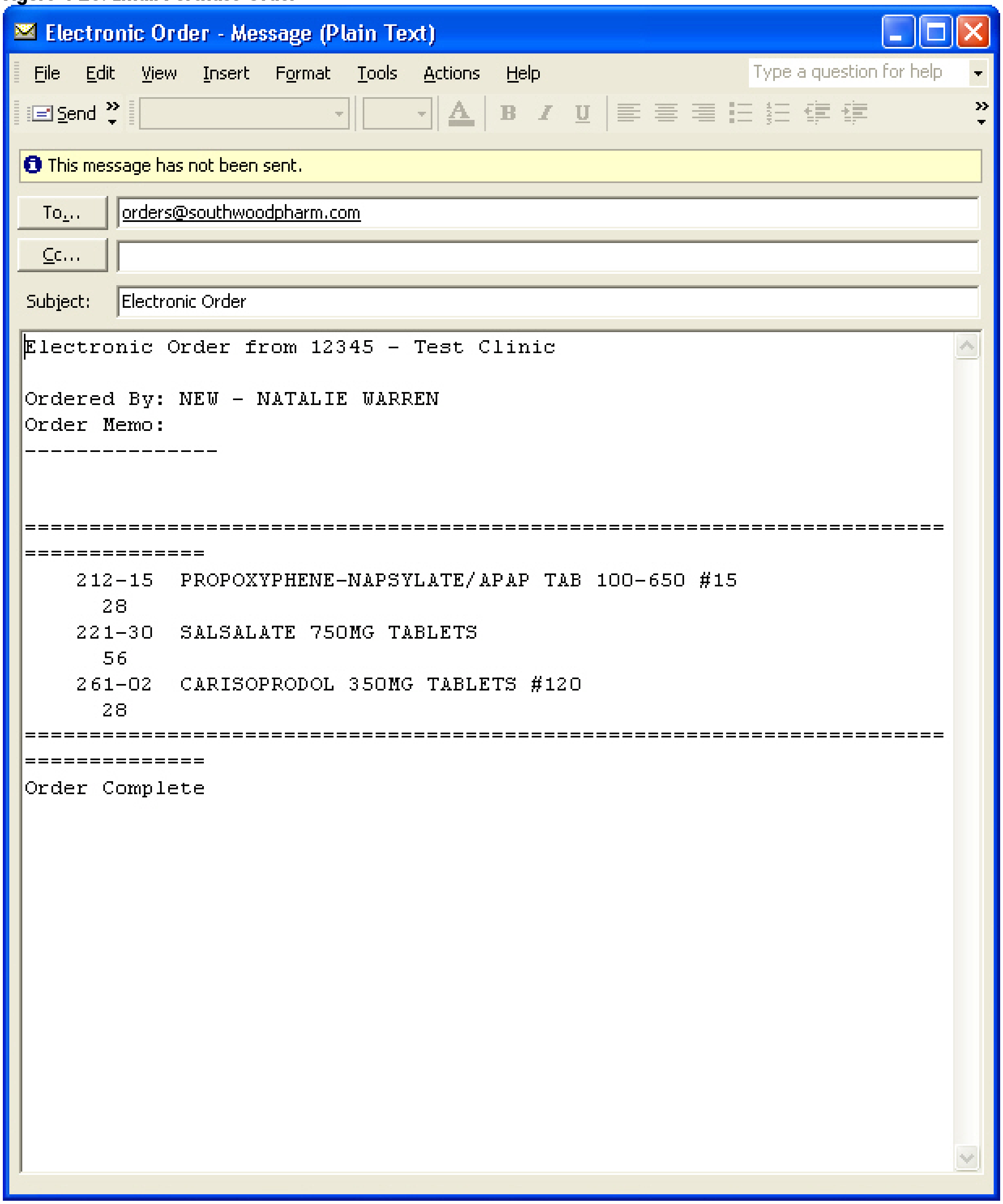
7. Click **SAVE PRINT** to generate a view of the purchase order (see figure 4-25). From the order view, select the printer icon to print the order.

Figure 4-25: Print Purchase Order



8. To email your purchase order to Southwood Pharmaceuticals using your default email program, click **SAVE E-MAIL**. Your order will display as an email message (see figure 4-26), which you can transmit.

Figure 4-26: Email Purchase Order



Chapter

5

The Worker's Comp Menu

The ScriptPlus Worker's Comp menu offers a selection of functions:

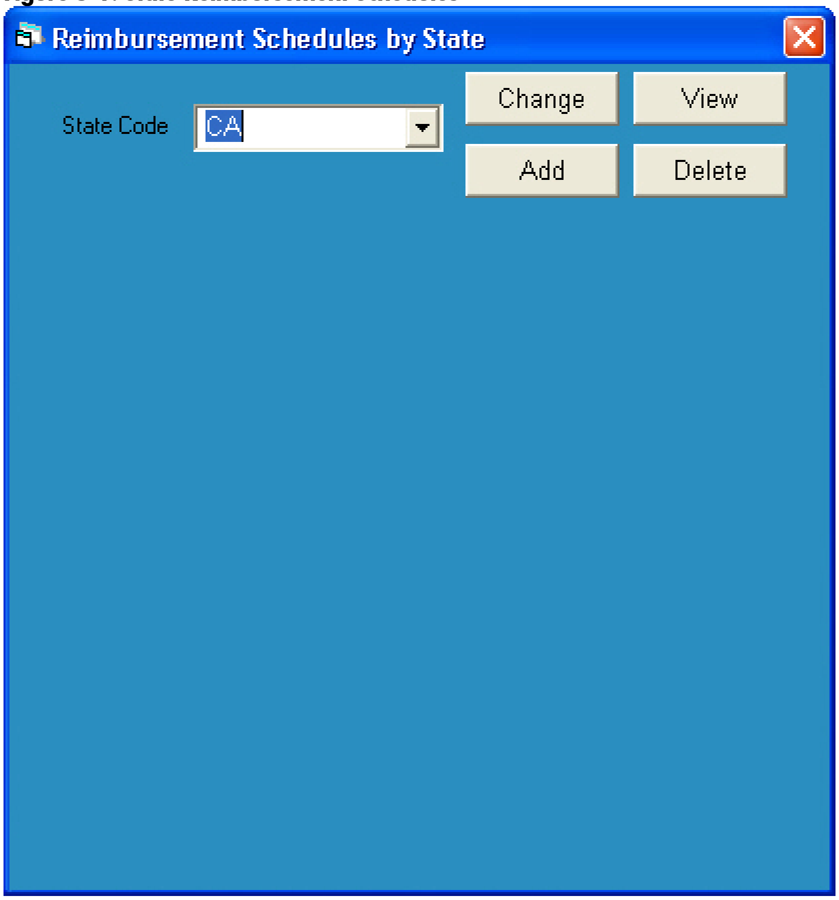
- State Reimbursements
- Carrier Maintenance
- Employer Maintenance
- Claim Maintenance/Print HCFA

State Reimbursements

The main State Reimbursements screen contains a drop-down list of State Codes, and offers four functions (see Figure 5-1):

- **Change** – to change State Reimbursement information
- **Add** – to add new State Reimbursement information
- **View** – to view State Reimbursement information
- **Delete** – to delete a State

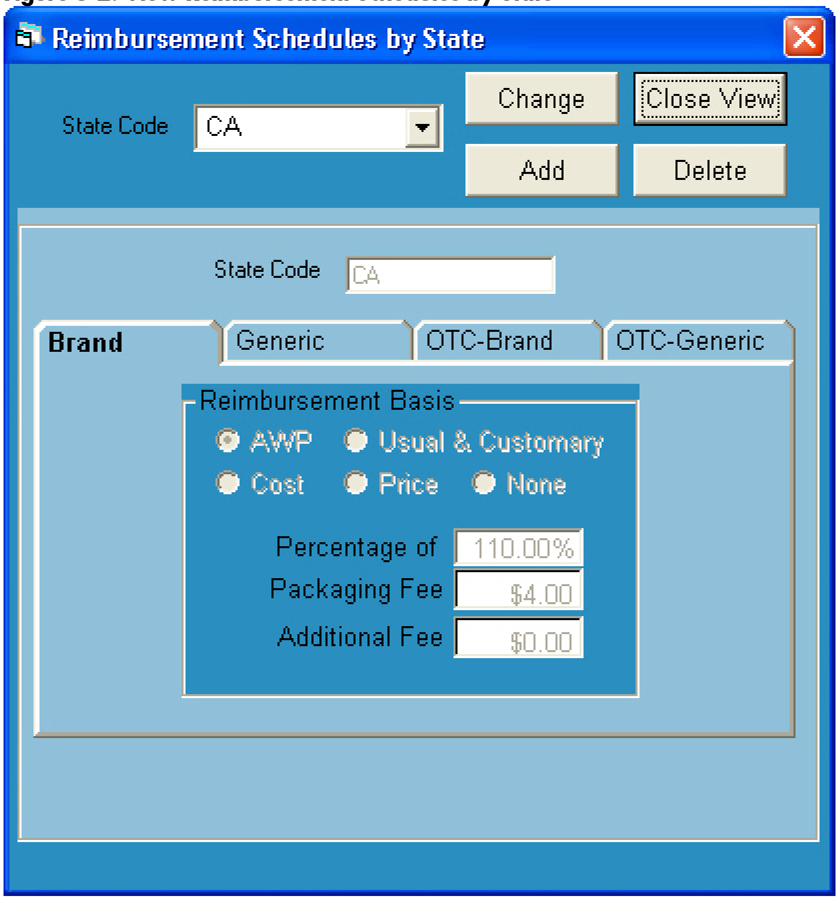
Figure 5-1: State Reimbursement Schedules



Change, View, or Delete State Reimbursement Information

To change, view, or delete State Reimbursement information, select the State code from the drop-down State Code list and click **Change, View, or Delete** (see figure 5-2).

Figure 5-2: View Reimbursement Schedules by State

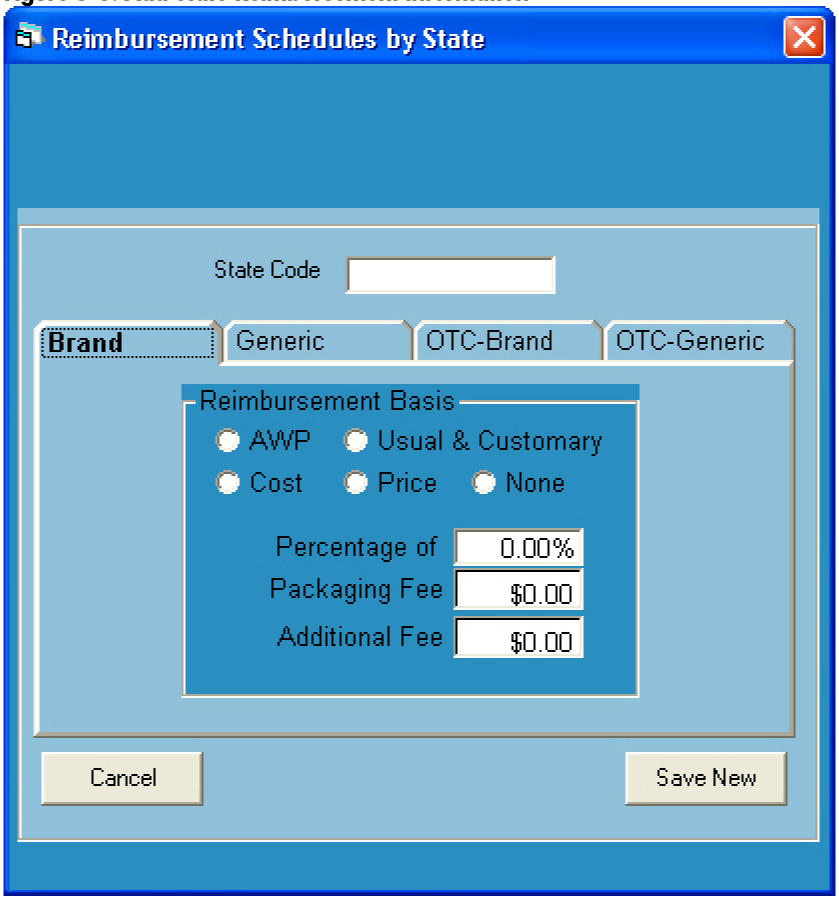


Each of the four tabs—**Brand**, **Generic**, **OTC-Brand**, and **OTC-General**—contain information about the Reimbursement Basis for tabbed product category, according to the regulations of the selected state. This information can only be changed when **Change** is selected from the main screen.

Add State Reimbursement Information

1. To add State Reimbursement information, click **Add**.
2. Enter a State Code.
3. Complete the **Reimbursement Basis** information according to the regulations of the new state (see Figure 5-3).
4. When the information is complete, click **Save New**.

Figure 5-3: Add State Reimbursement information

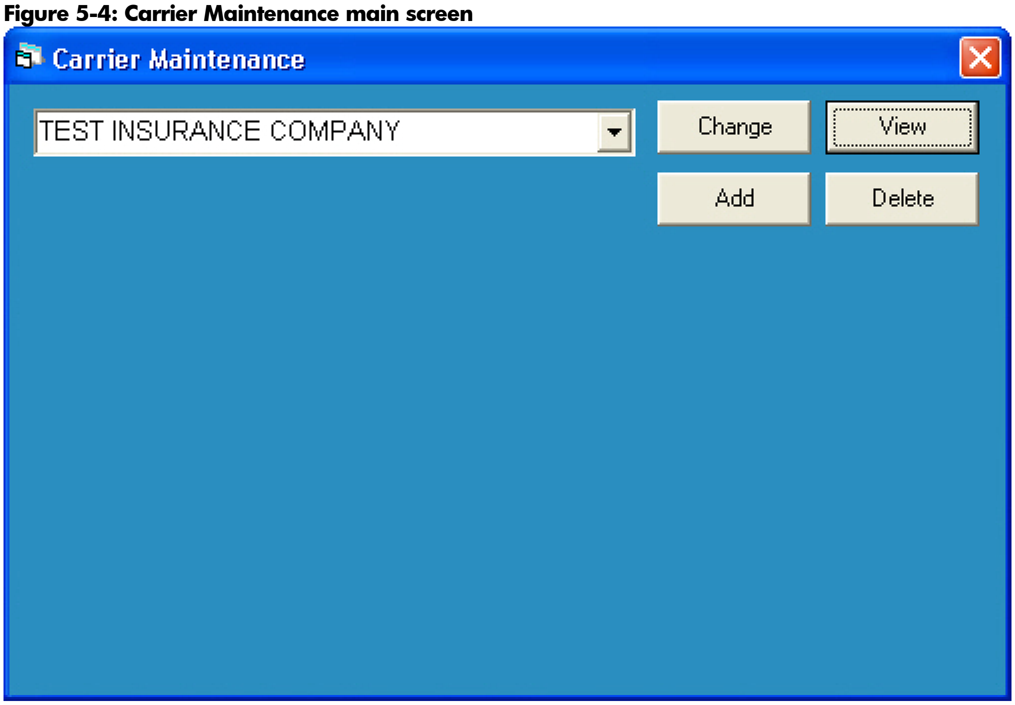


Carrier Maintenance

The main Carrier Maintenance screen contains a drop-down list of Carriers, and offers four functions (see Figure 5-4):

- **Change** – to change Carrier information
- **Add** – to add new Carrier information
- **View** – to view Carrier information
- **Delete** – to delete a Carrier

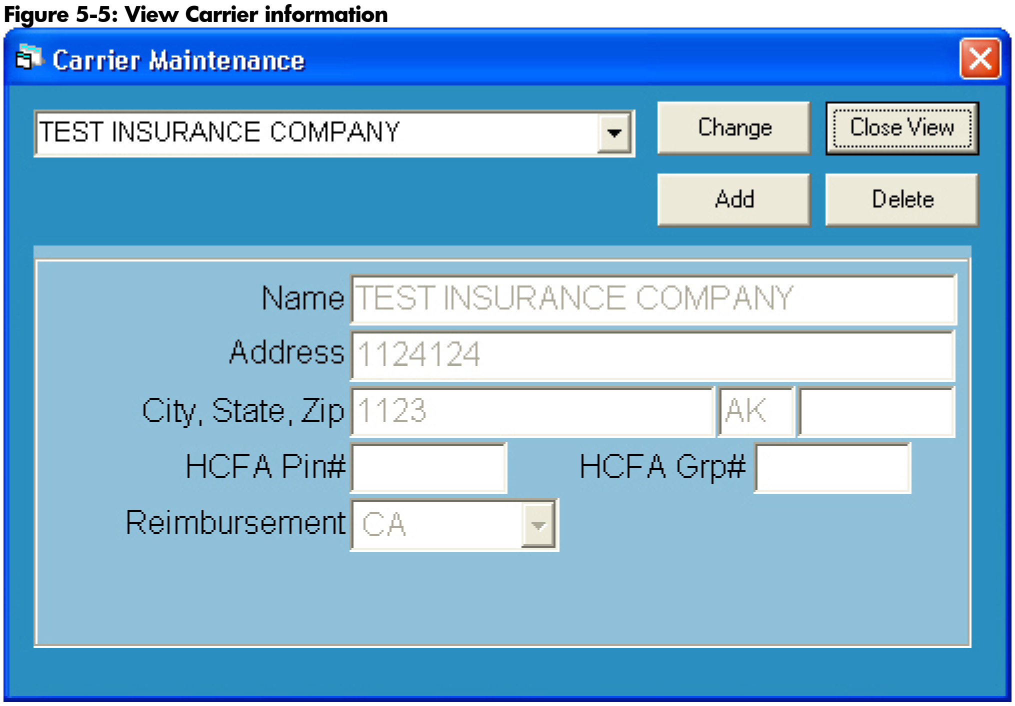
Figure 5-4: Carrier Maintenance main screen



Change, View, or Delete Carrier Information

To change, view, or delete Carrier information, select the Carrier name from the drop-down list and click **Change, View, or Delete** (see figure 5-5).

Figure 5-5: View Carrier information

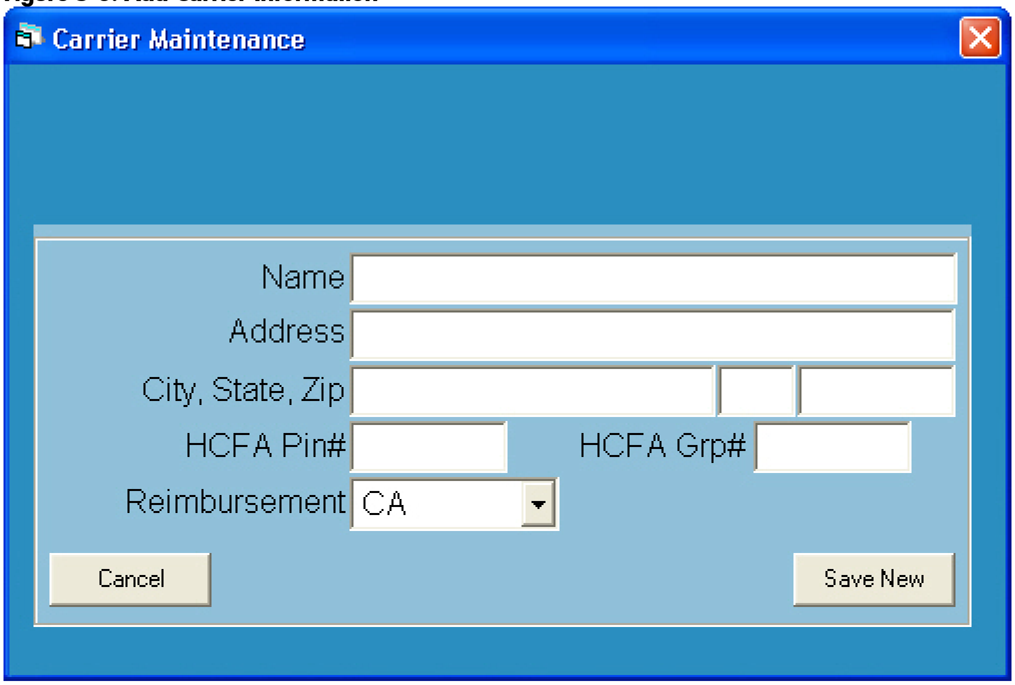


Add Carrier Information

1. To add a new Carrier, click **Add**.

2. Complete the Carrier information (see Figure 5-6).
3. When the information is complete, click **Save New**.

Figure 5-6: Add Carrier Information

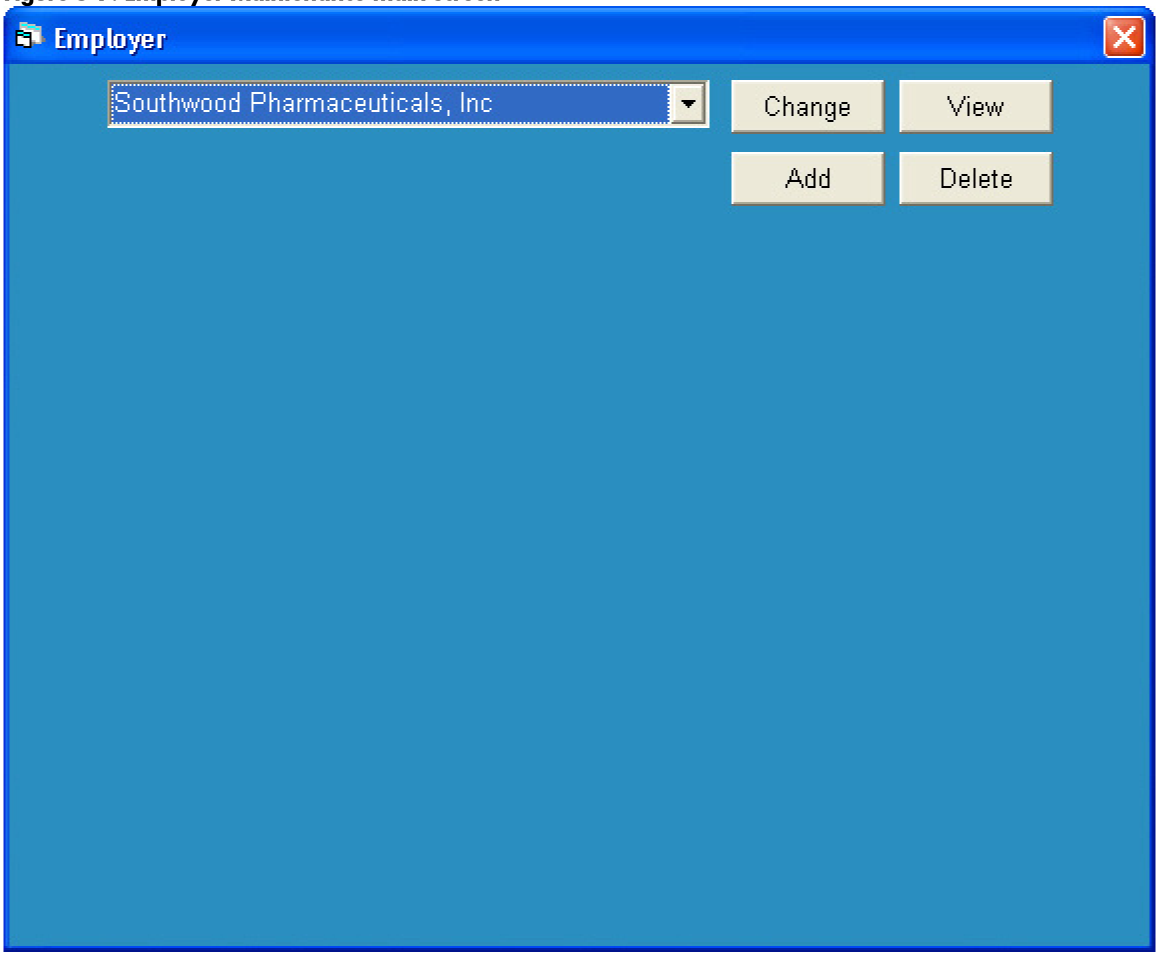


Employer Maintenance

The main Employer Maintenance screen contains a drop-down list of Employers, and offers four functions (see Figure 5-7):

- **Change** – to change Employer information
- **Add** – to add new Employer information
- **View** – to view Employer information
- **Delete** – to delete a Employer

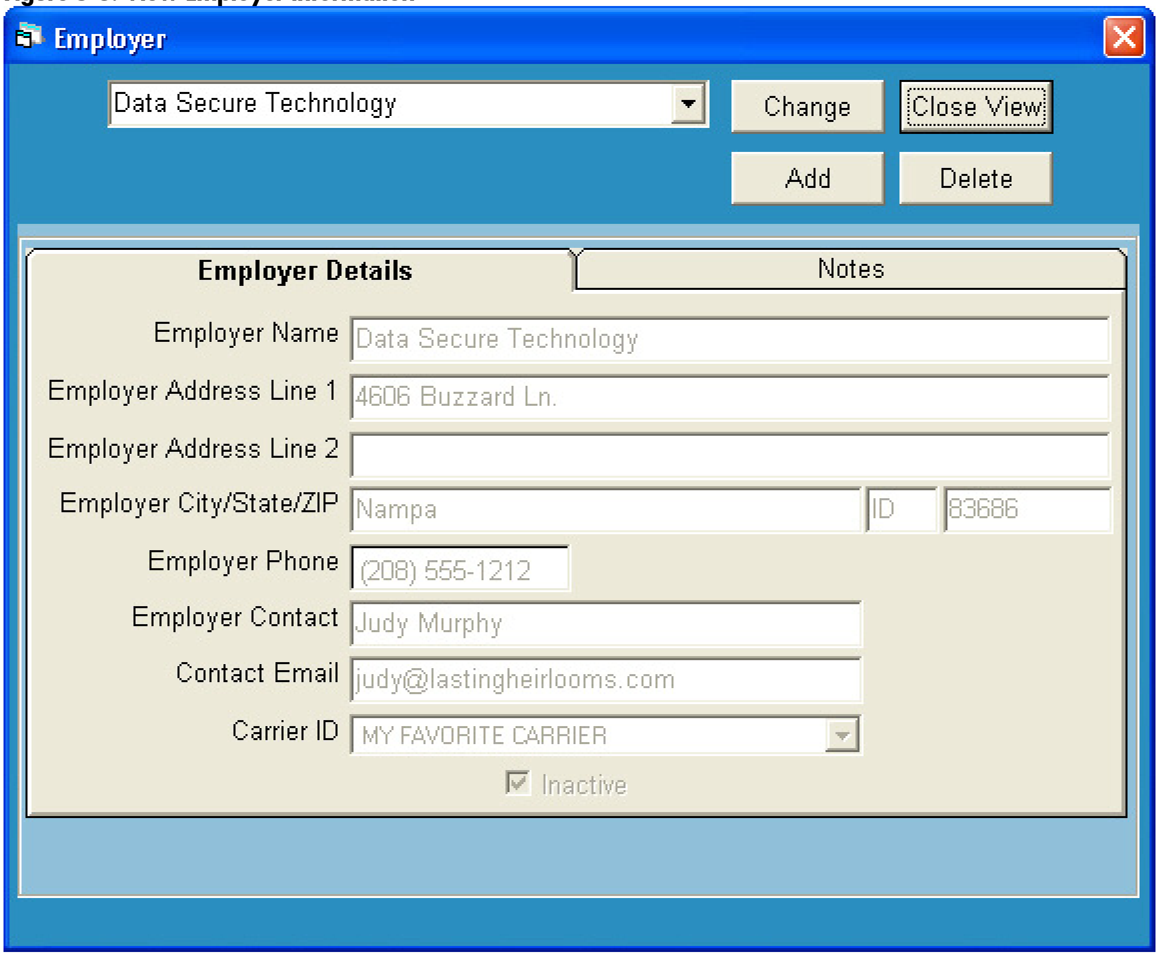
Figure 5-7: Employer Maintenance main screen



Change, View, or Delete Employer Information

To change, view, or delete Employer information, select the Employer name from the drop-down list and click **Change, View, or Delete** (see figure 5-8).

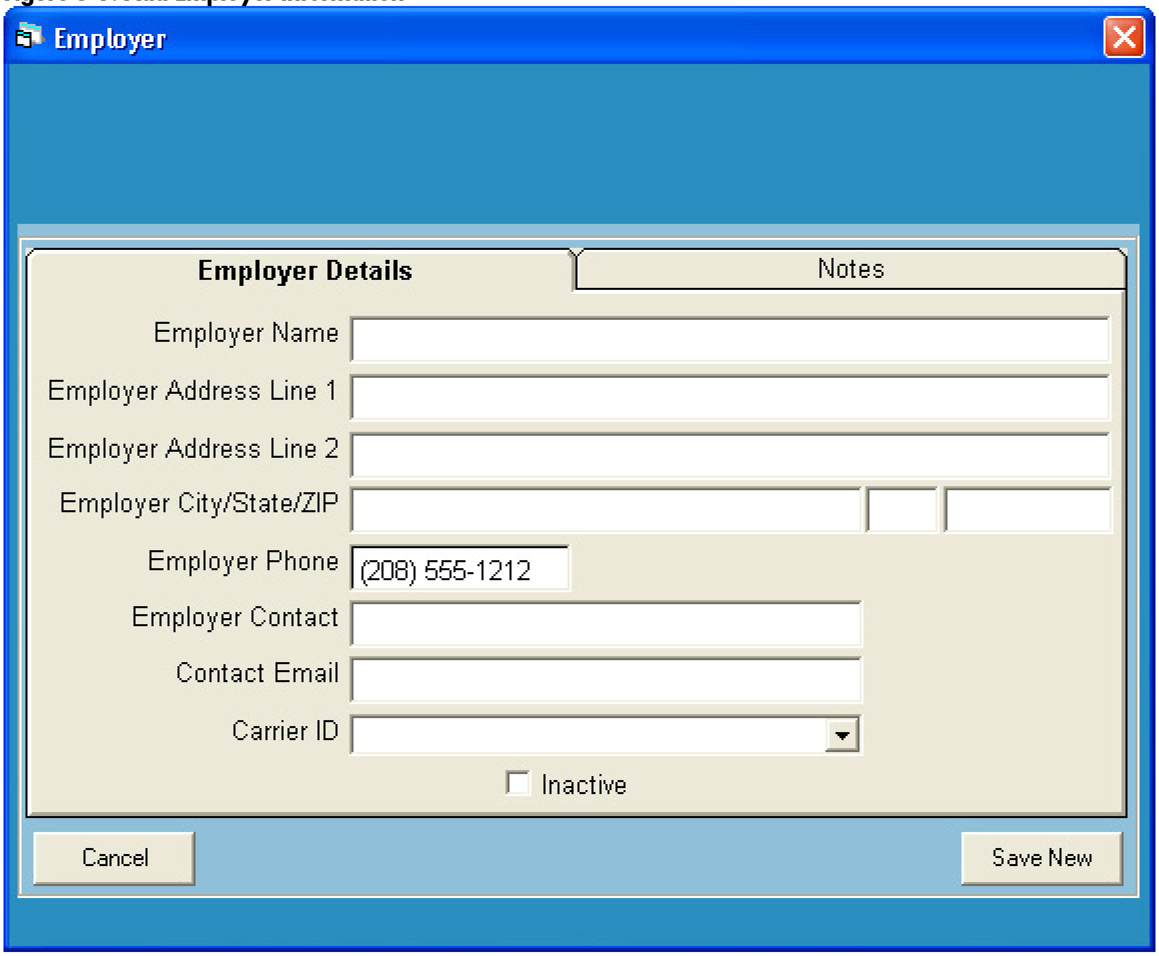
Figure 5-8: View Employer information



Add Employer Information

1. To add a new Employer, click **Add**.
2. Complete the **Employer Details** information (see Figure 5-9).
3. When the information is complete, click **Save New**.

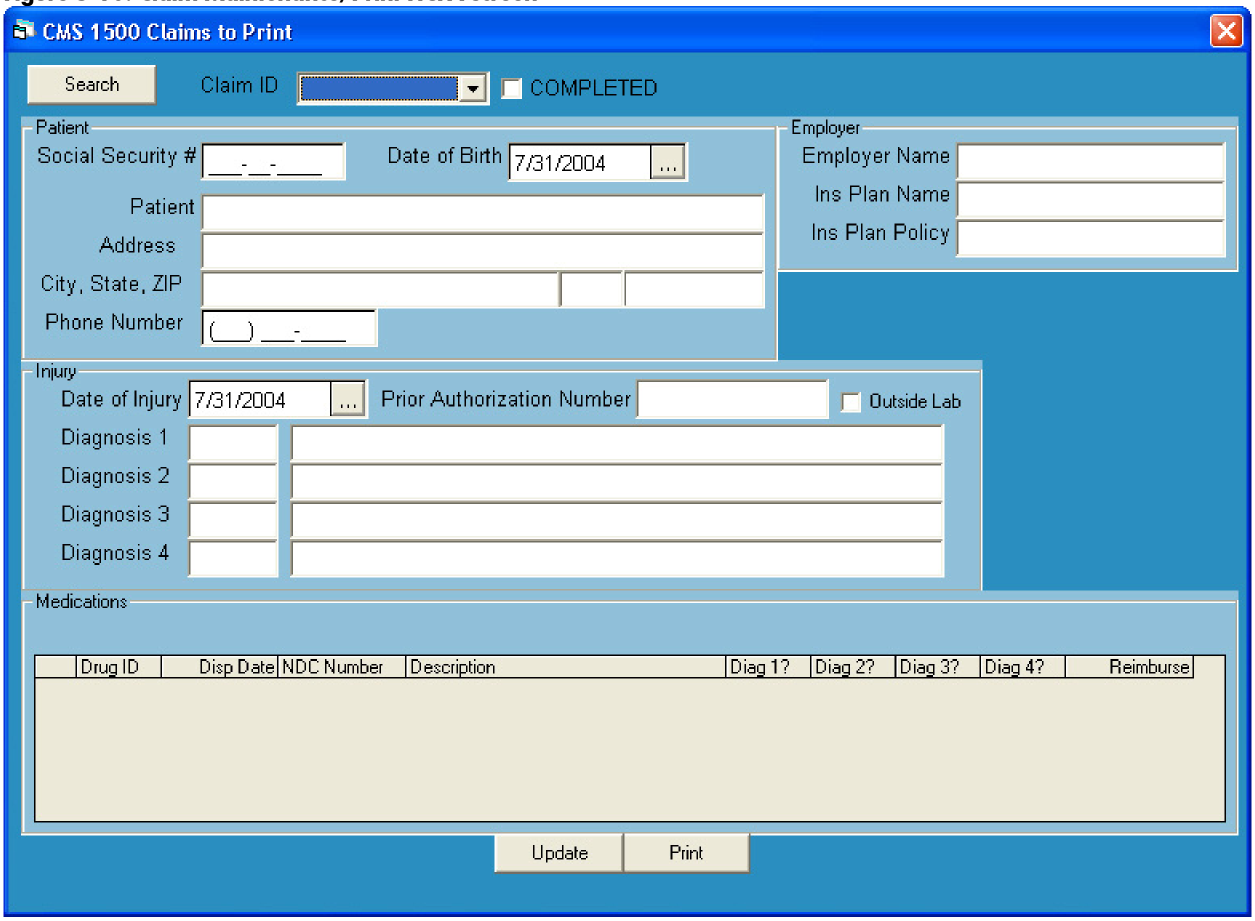
Figure 5-9: Add Employer information



Claim Maintenance/Print HCFA

The Claim Maintenance/Print HCFA screen allows you to track and manage claims and print HCFA forms (see Figure 5-10).

Figure 5-10: Claim Maintenance/Print HCFA screen



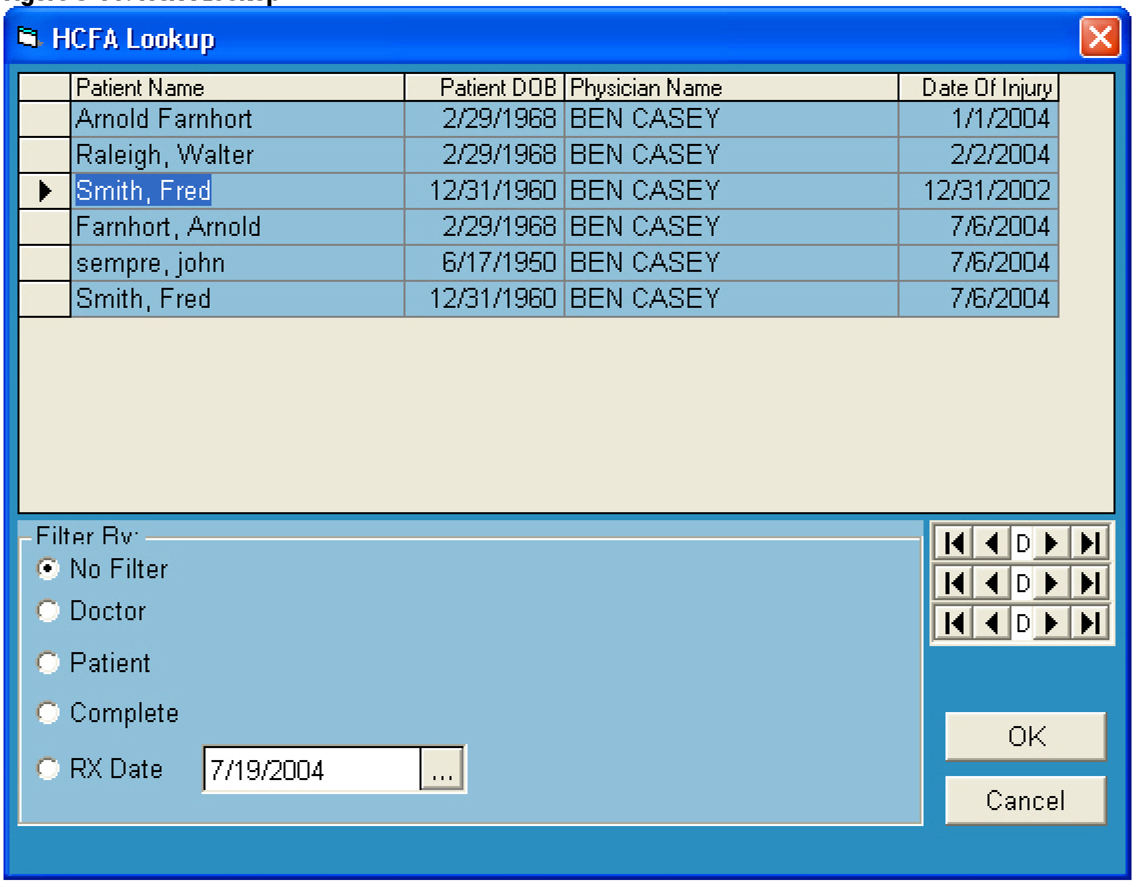
Selecting Claims

Select claims by using the **Search** function or by selecting a Claim ID number from the drop-down **Claim ID** list.

Search/HCFA Lookup

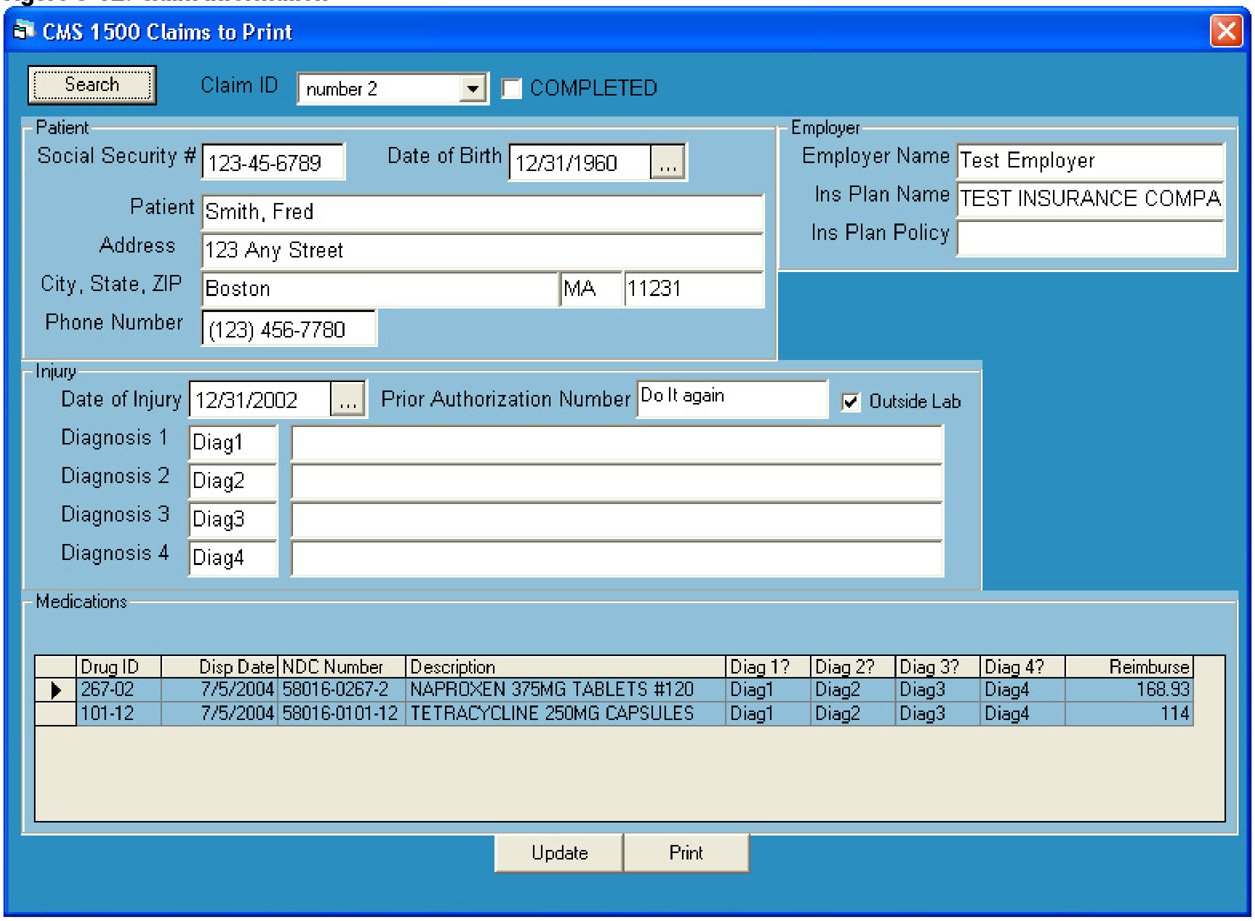
1. Click **Search** to perform an HCFA lookup (see figure 5-11). The search can be filtered by Doctor, Patient, Status (complete/incomplete), or RX Date.
2. Select a claim from the list and click **OK**.

Figure 5-11: HCFA Lookup



The Claims Maintenance screen will contain the information from the claim selected (see figure 5-12).

Figure 5-12: Claim information



If you make any changes to the claim information, click **Update**.

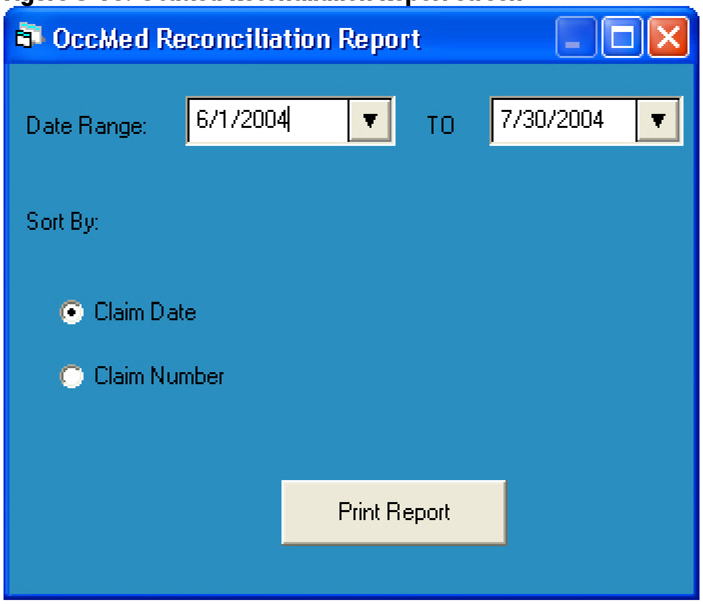
To print the HCFA form, click **Print**.

OCCMed Reconciliation Report

To print an OCCMed Reconciliation report:

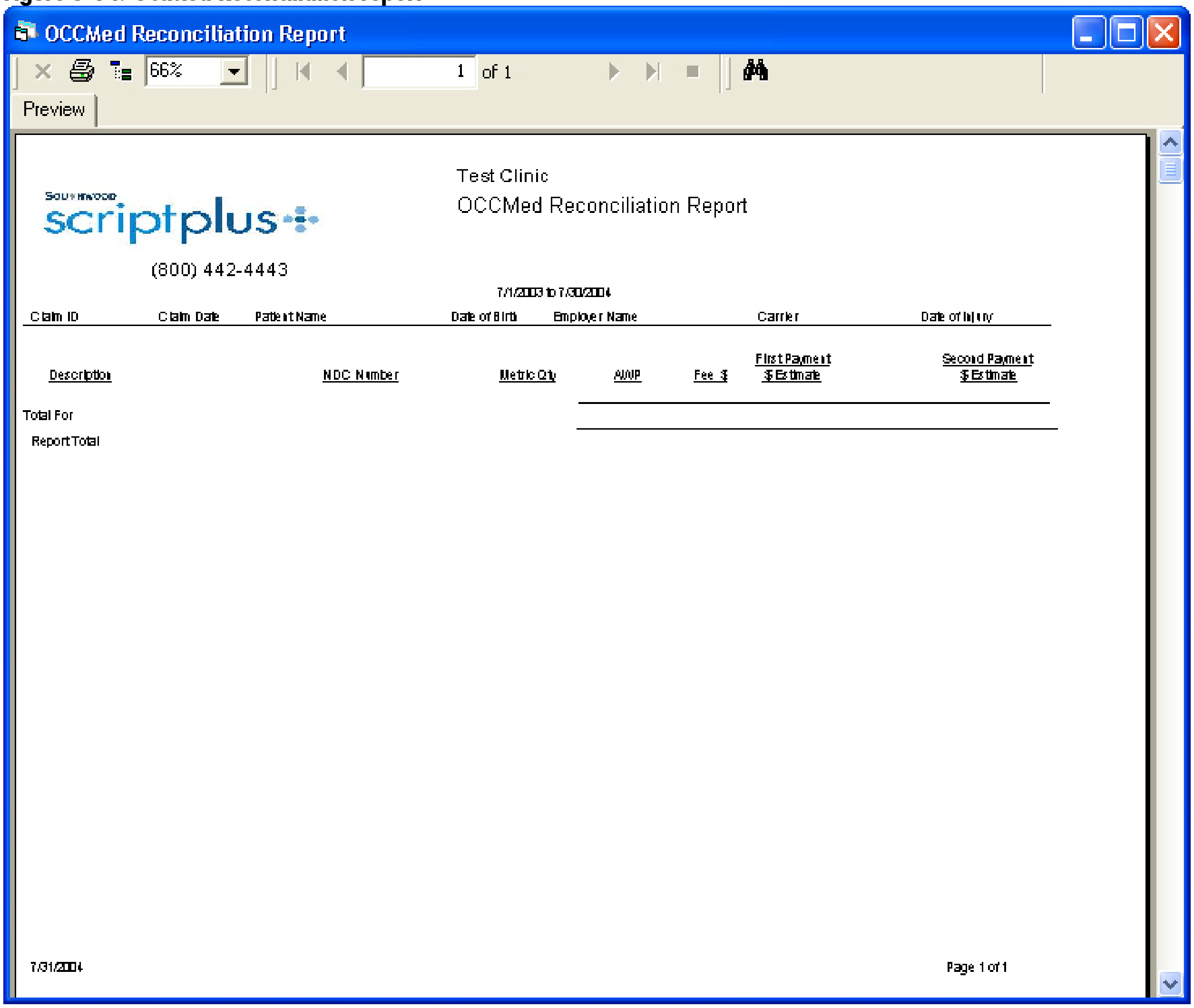
1. Select the **Date Range** for the report.
2. Select whether you want the report sorted by **Claim Date** or **Claim Number**.
3. Click **Print Report**.

Figure 5-13: OccMed Reconciliation Report screen



The OccMed Reconciliation report will display in a new screen (see figure 5-14).

Figure 5-14: OccMed Reconciliation report



Chapter

6

The Reports Menu

The ScriptPlus Reports menu offers a selection of reports that can be generated:

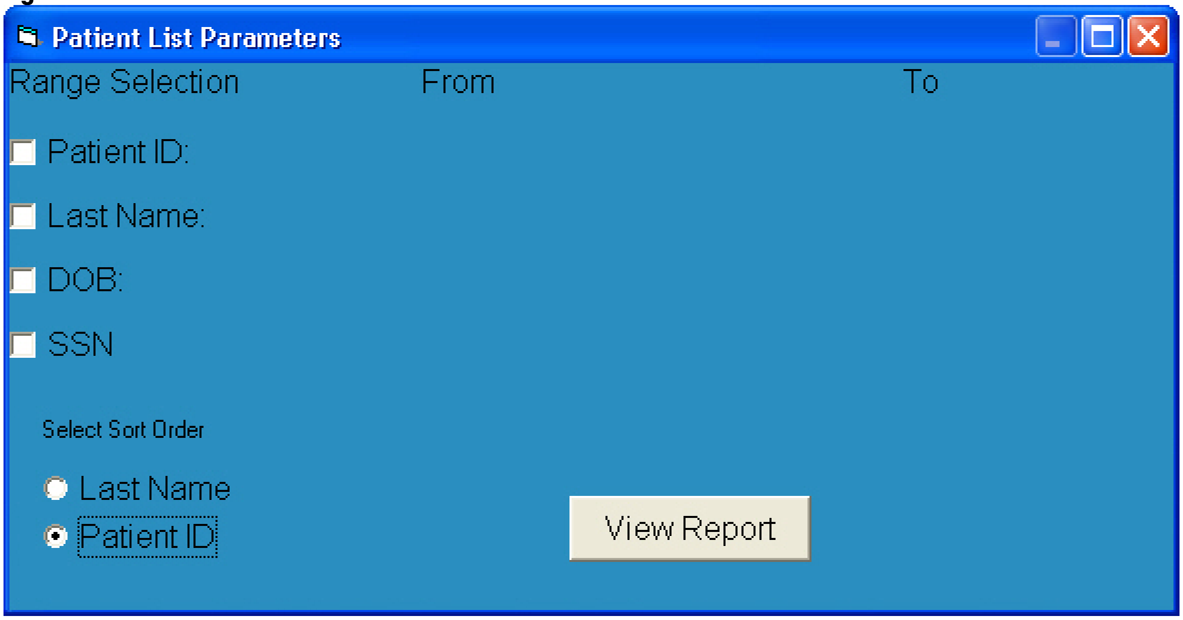
- Patient List
- Physician List
- User List
- Product List
- Processor List
- Dispensing List
- Scheduled Drug Log
- Scheduled Drug Count
- Inventory Value Report
- Inventory Movement Report
- Adjudication Log

Patient List

To generate a Patient List report, select a category from the **Range Selection** list (see figure 6-1):

- **Patient ID**
- **Last Name**
- **DOB**
- **SSN**

Figure 6-1: Patient List Parameters screen



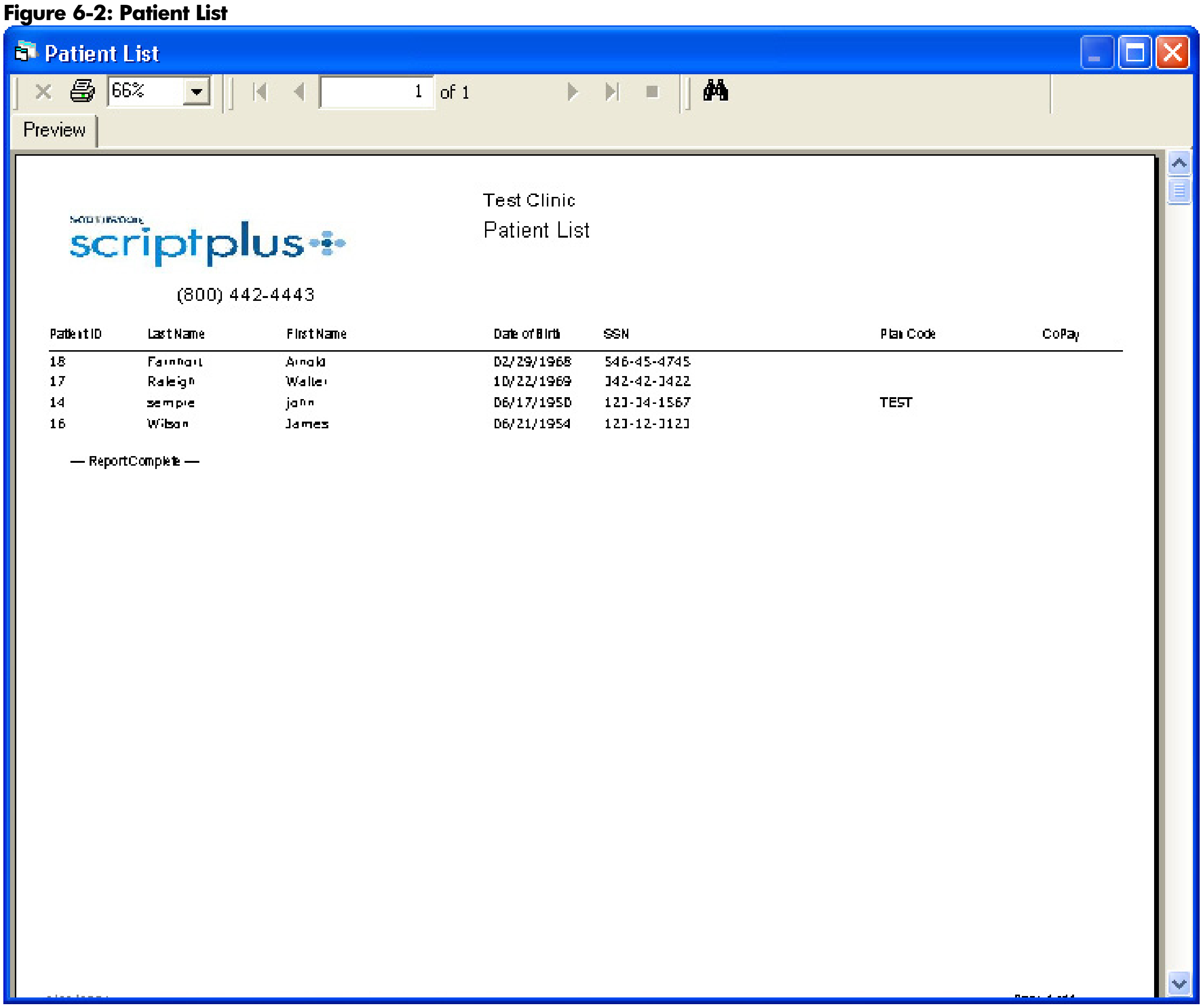
When you select a range category, the **From** and **To** fields will appear, with drop-down lists to select a specified range.

NOTE: If you select none of the range categories, the report will include all patient records.

Select a **Sort Order** for the report—Last Name or Patient ID—and click **View Report**.

The Patient List report will display in a new screen (see figure 6-2).

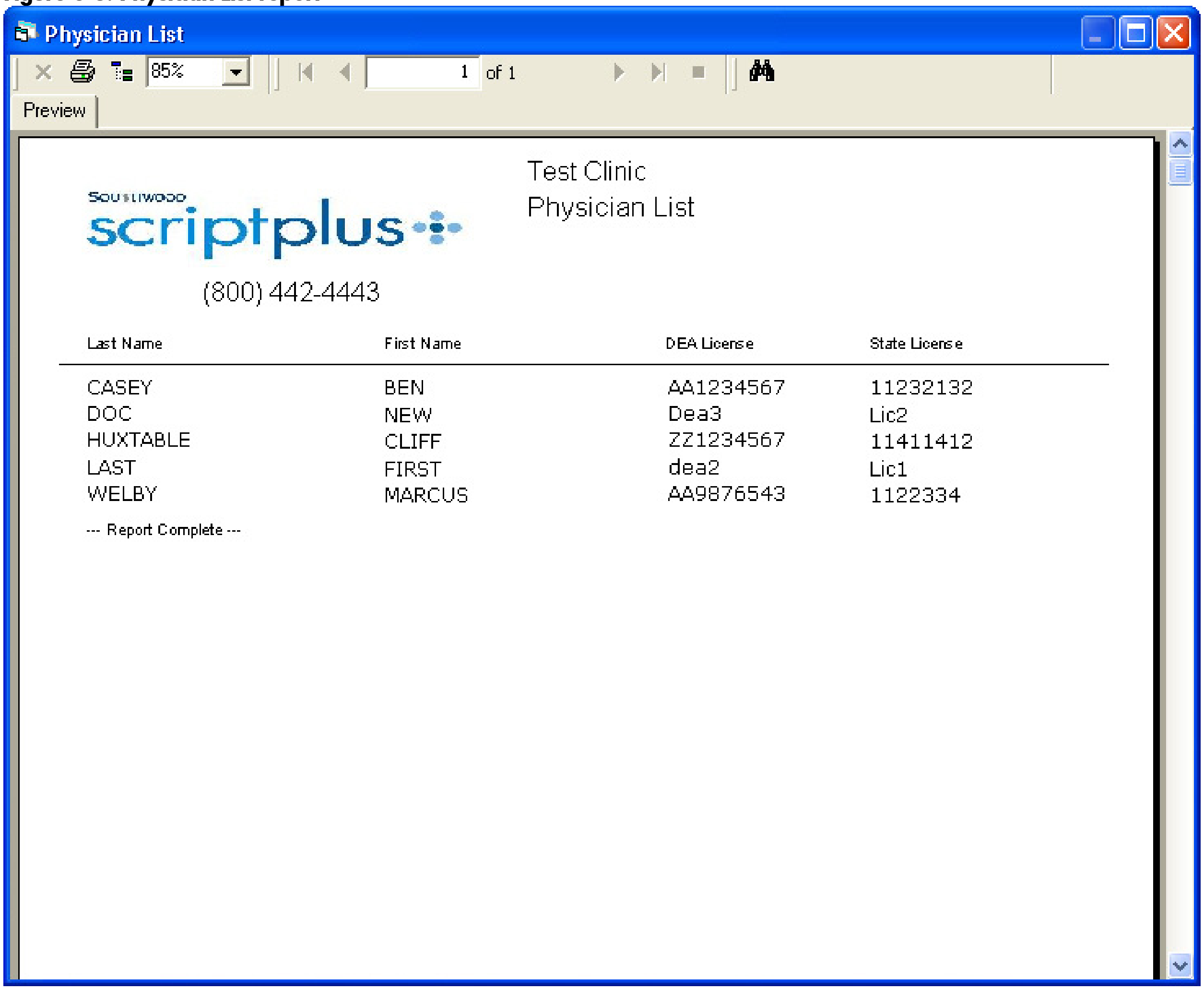
Figure 6-2: Patient List



Physician List

When you select **Physician List** from the **Reports** menu, a report of all clinic physicians will generate and display in a new screen(see figure 6-3).

Figure 6-3: Physician List report



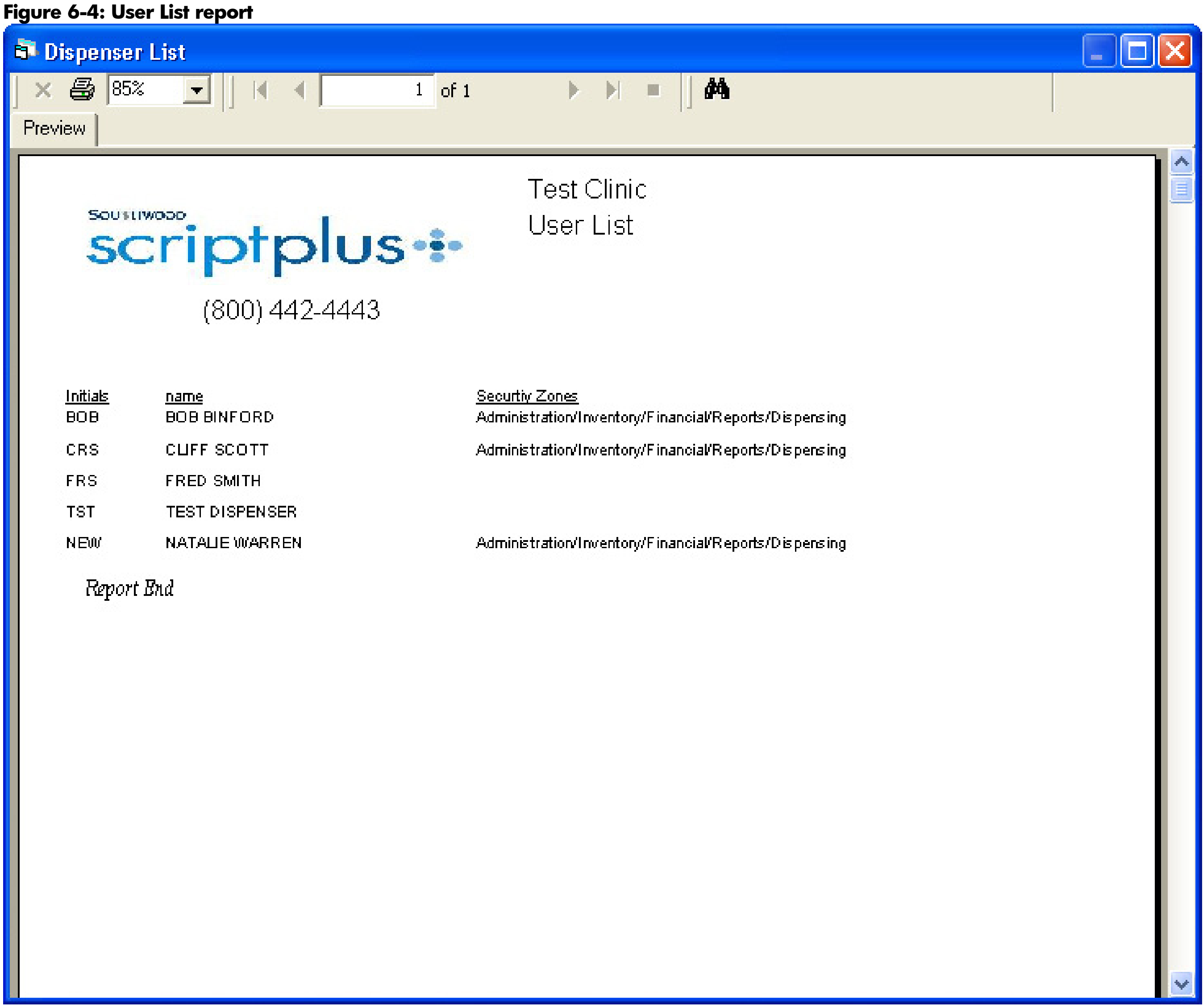
Last Name	First Name	DEA License	State License
CASEY	BEN	AA1234567	11232132
DOC	NEW	Dea3	Lic2
HUXTABLE	CLIFF	ZZ1234567	11411412
LAST	FIRST	dea2	Lic1
WELBY	MARCUS	AA9876543	1122334

--- Report Complete ---

User List

When you select **User List** from the **Reports** menu, a report of all ScriptPlus dispensers will generate and display in a new screen(see figure 6-4).

Figure 6-4: User List report

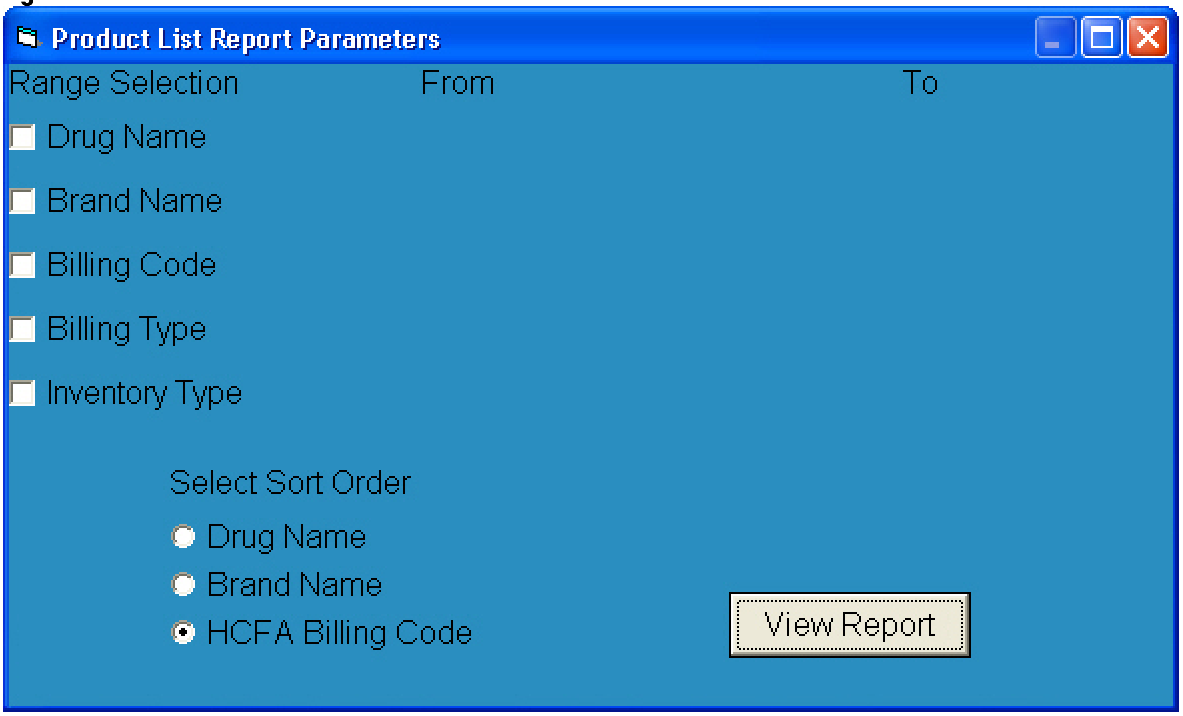


Product List

To generate a Product List report, select a category from the **Range Selection** list (see figure 6-5):

- **Drug Name**
- **Brand Name**
- **Billing Code**
- **Billing Type**
- **Inventory Type**

Figure 6-5: Product List



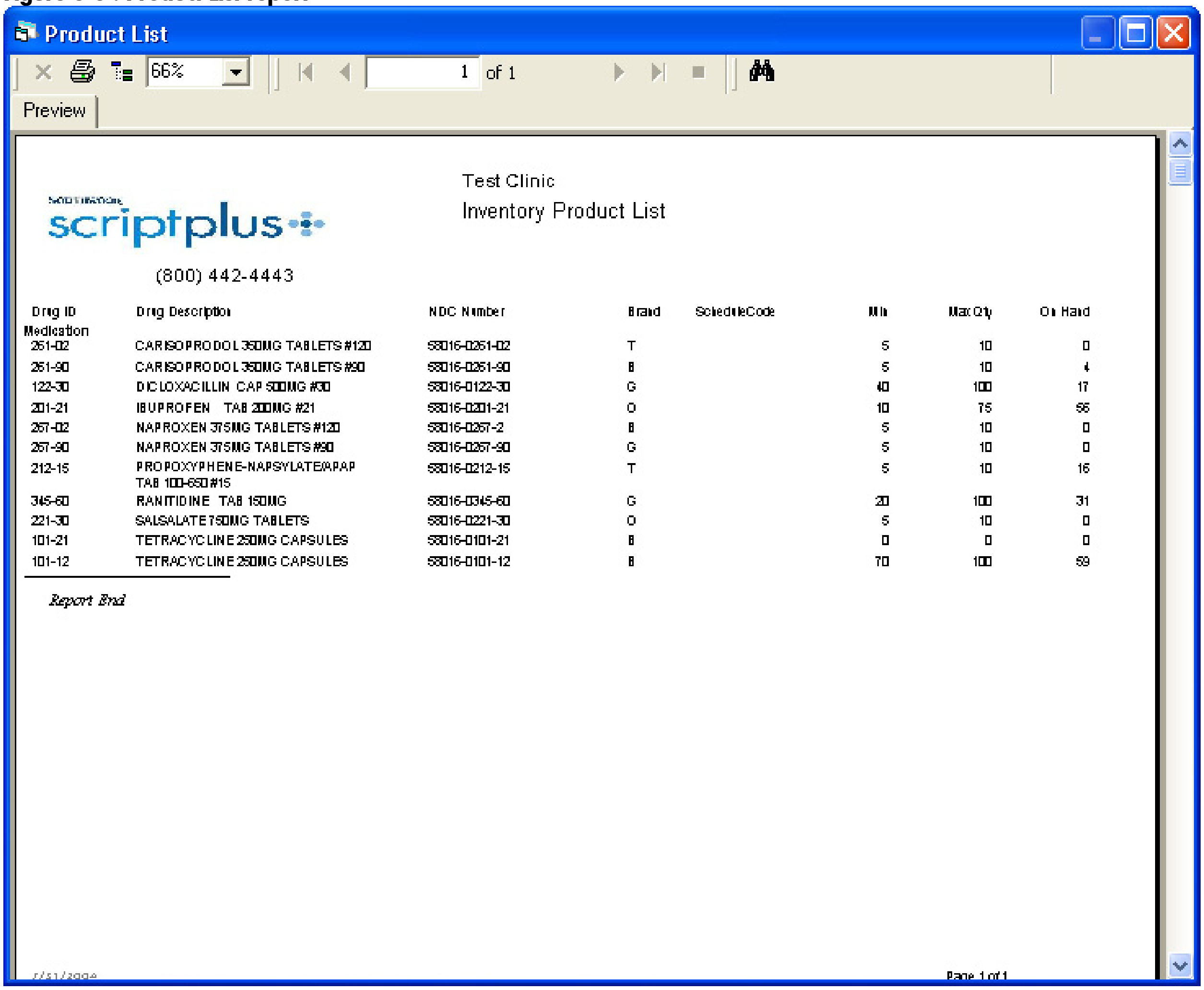
When you select a range category, the **From** and **To** fields will appear, with drop-down lists to select a specified range.

NOTE: If you select none of the range categories, the report will include all product records.

Select a **Sort Order** for the report—Drug Name, Brand Name, or HCFA Billing Code—and click **View Report**.

The Product List report will display in a new screen (see figure 6-6).

Figure 6-6 : Product List report



Drug ID	Drug Description	NDC Number	Brand	ScheduleCode	Min	Max Qty	On Hand
Medication							
261-02	CARISOPRODOL 350MG TABLETS #120	58016-0261-02	T		5	10	0
261-90	CARISOPRODOL 350MG TABLETS #90	58016-0261-90	B		5	10	4
122-30	DICLOXACILLIN CAP 500MG #30	58016-0122-30	G		40	100	17
201-21	IBUPROFEN TAB 200MG #21	58016-0201-21	O		10	75	56
267-02	NAPROXEN 375MG TABLETS #120	58016-0267-2	B		5	10	0
267-90	NAPROXEN 375MG TABLETS #90	58016-0267-90	G		5	10	0
212-15	PROPOXYPHENE-NAPSYLATE/APAP TAB 100-650 #15	58016-0212-15	T		5	10	16
345-60	RANITIDINE TAB 150MG	58016-0345-60	G		20	100	31
221-30	SALSALATE 750MG TABLETS	58016-0221-30	O		5	10	0
101-21	TETRACYCLINE 250MG CAPSULES	58016-0101-21	B		0	0	0
101-12	TETRACYCLINE 250MG CAPSULES	58016-0101-12	B		70	100	59

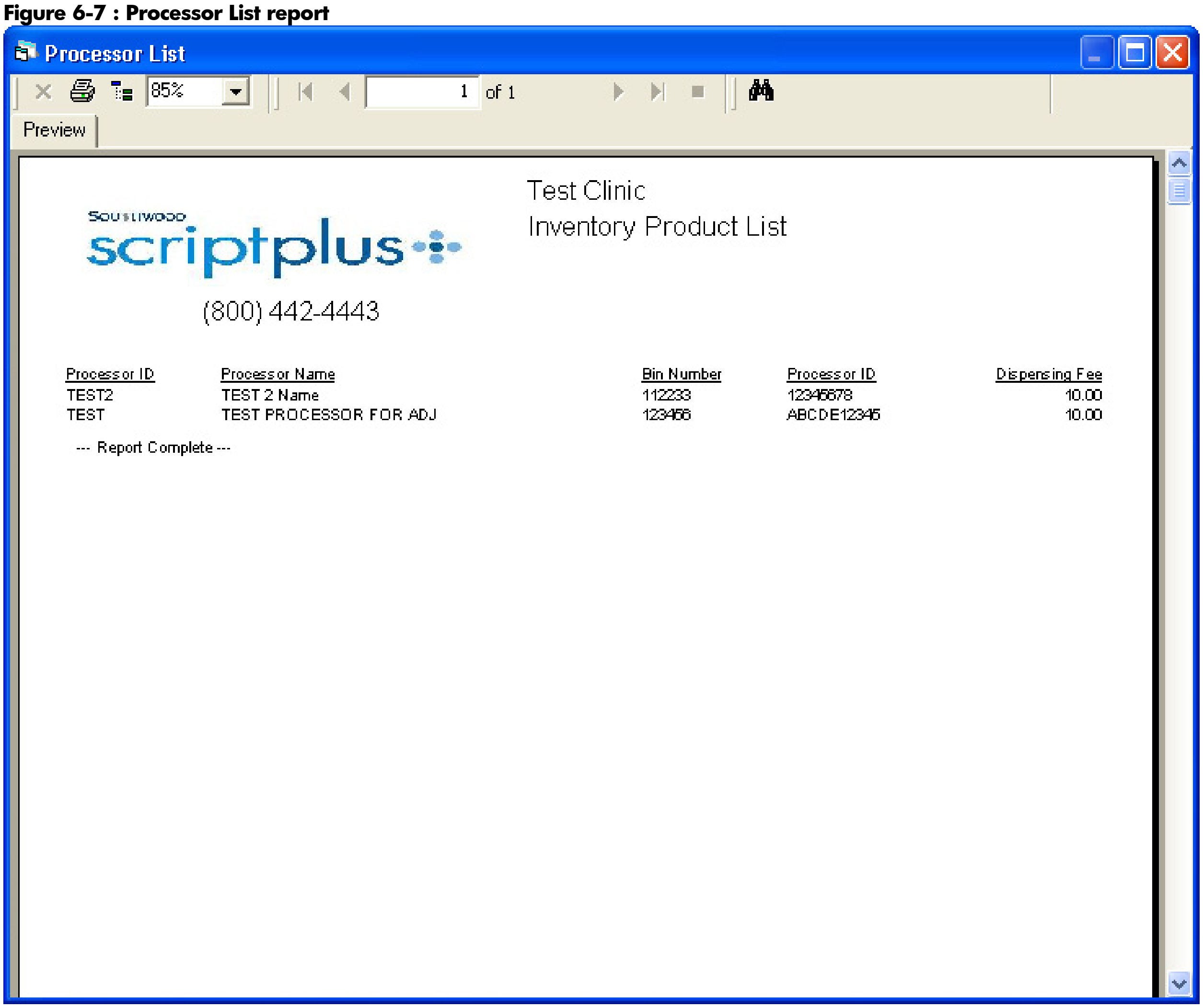
Report End

Page 1 of 1

Processor List

When you select Processor List from the Reports menu, a report of all Processors will generate and display in a new screen(see figure 6-7).

Figure 6-7 : Processor List report

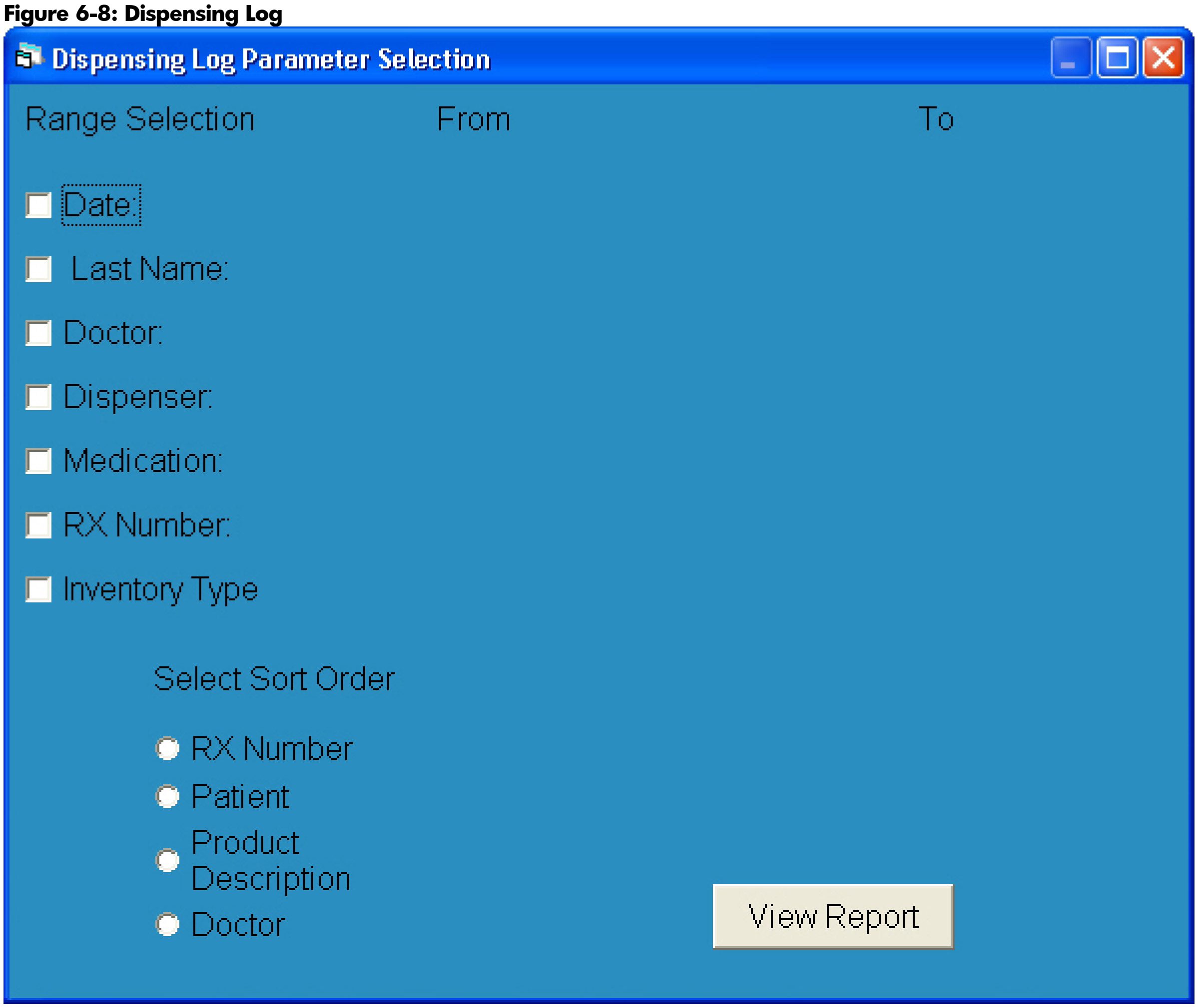


Dispensing Log

To generate a Dispensing Log report, select a category from the **Range Selection** list (see figure 6-8):

- **Date**
- **Last Name**
- **Doctor**
- **Dispenser**
- **Medication**
- **RX Number**
- **Inventory Type**

Figure 6-8: Dispensing Log



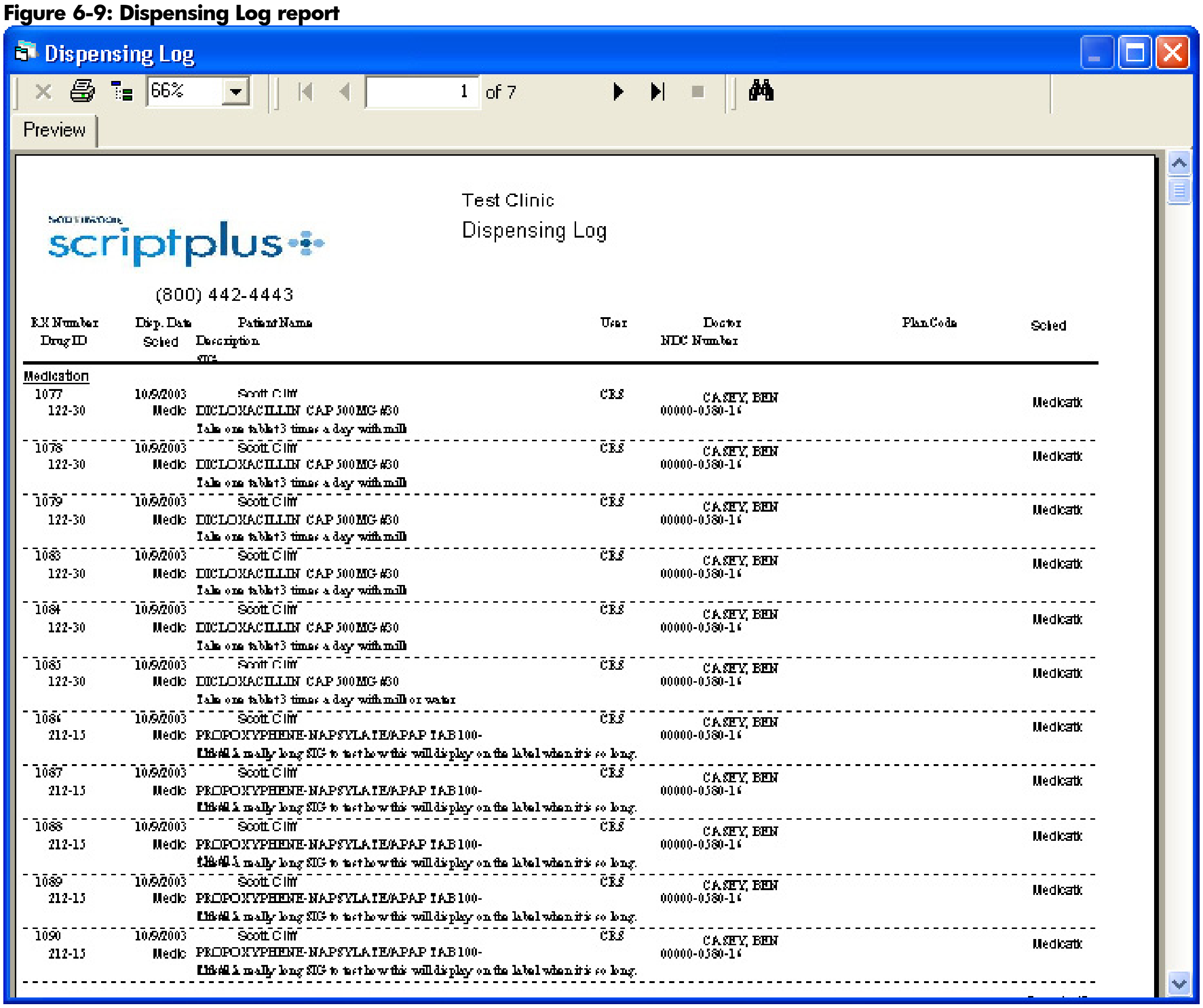
When you select a range category, the **From** and **To** fields will appear, with drop-down lists to select a specified range.

NOTE: If you select none of the range categories, the report will include all dispensing records.

Select a **Sort Order** for the report—RX Number, Patient, Product Description, or Doctor—and click **View Report**.

The Dispensing Log report will display in a new screen (see figure 6-9).

Figure 6-9: Dispensing Log report

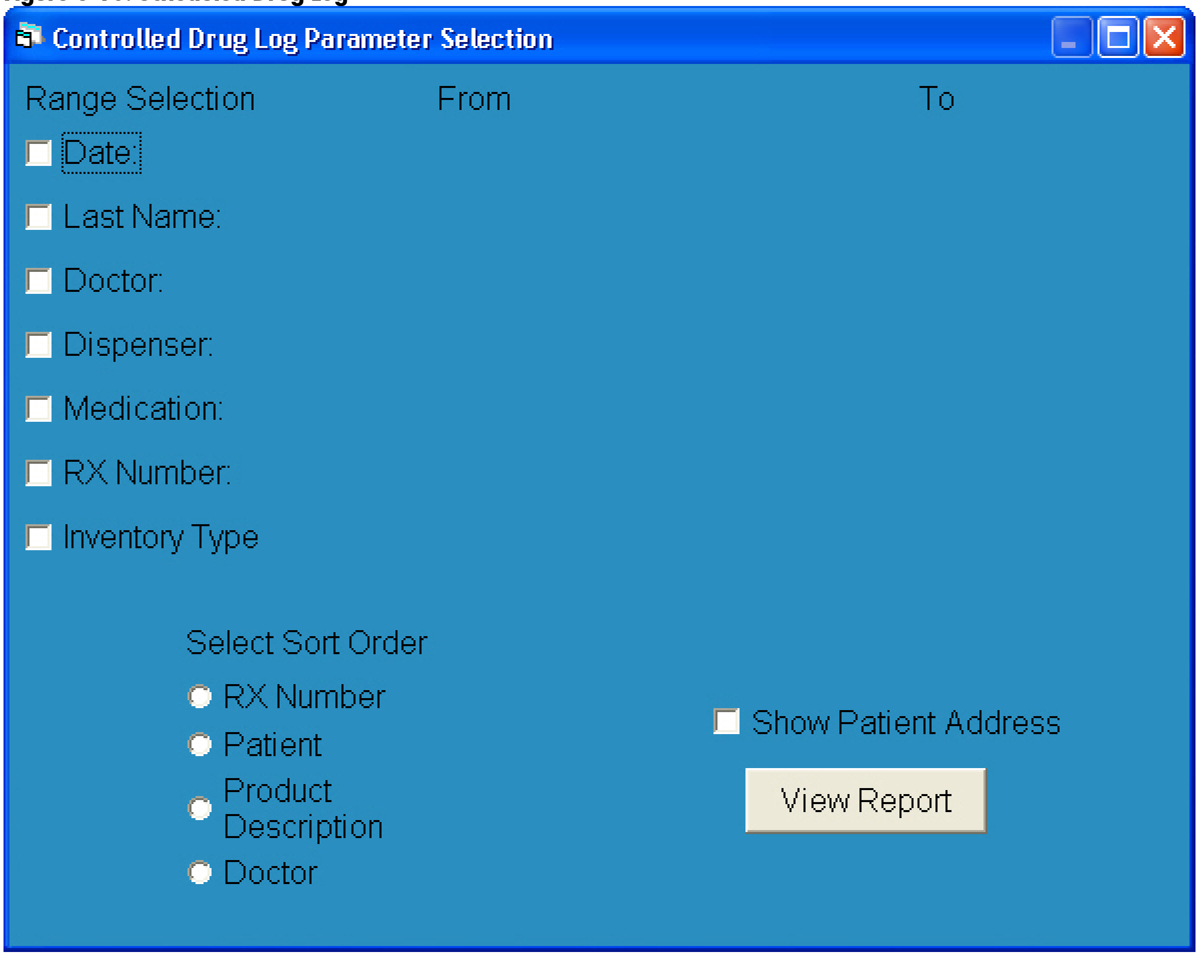


Scheduled Drug Log

To generate a Scheduled Drug Log report, select a category from the **Range Selection** list (see figure 6-10):

- **Date**
- **Last Name**
- **Doctor**
- **Dispenser**
- **Medication**
- **RX Number**
- **Inventory Type**

Figure 6-10: Scheduled Drug Log



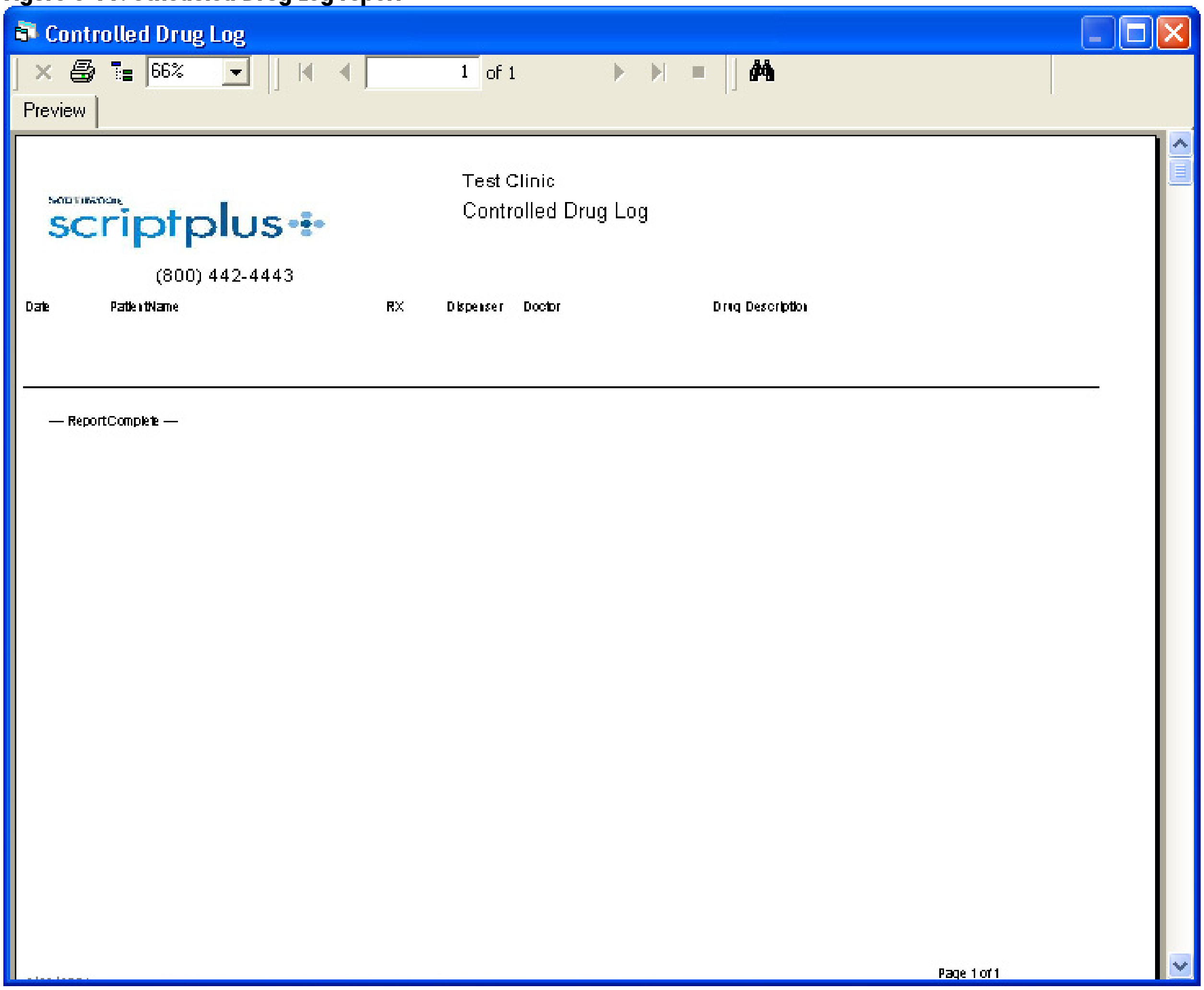
When you select a range category, the **From** and **To** fields will appear, with drop-down lists to select a specified range.

NOTE: If you select none of the range categories, the report will include all scheduled drug dispensing records.

Select a **Sort Order** for the report—RX Number, Patient, Product Description, or Doctor—and click **View Report**.

The Scheduled Drug Log report will display in a new screen (see figure 6-11).

Figure 6-11: Scheduled Drug Log report

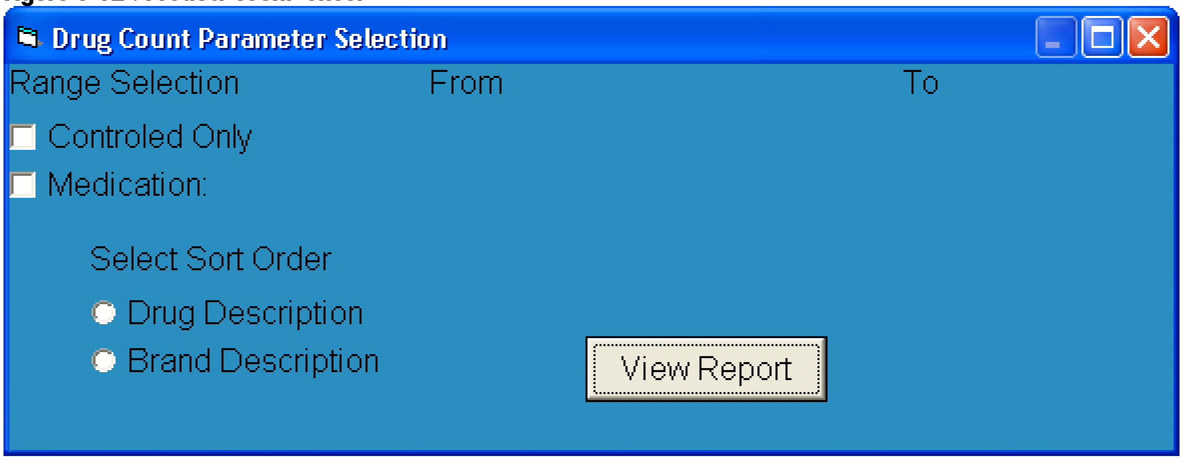


Product Count Sheet

To generate a Product Count Sheet report, select a category from the **Range Selection** list (see figure 6-12):

- **Controlled Only**
- **Medication**

Figure 6-12 : Product Count Sheet



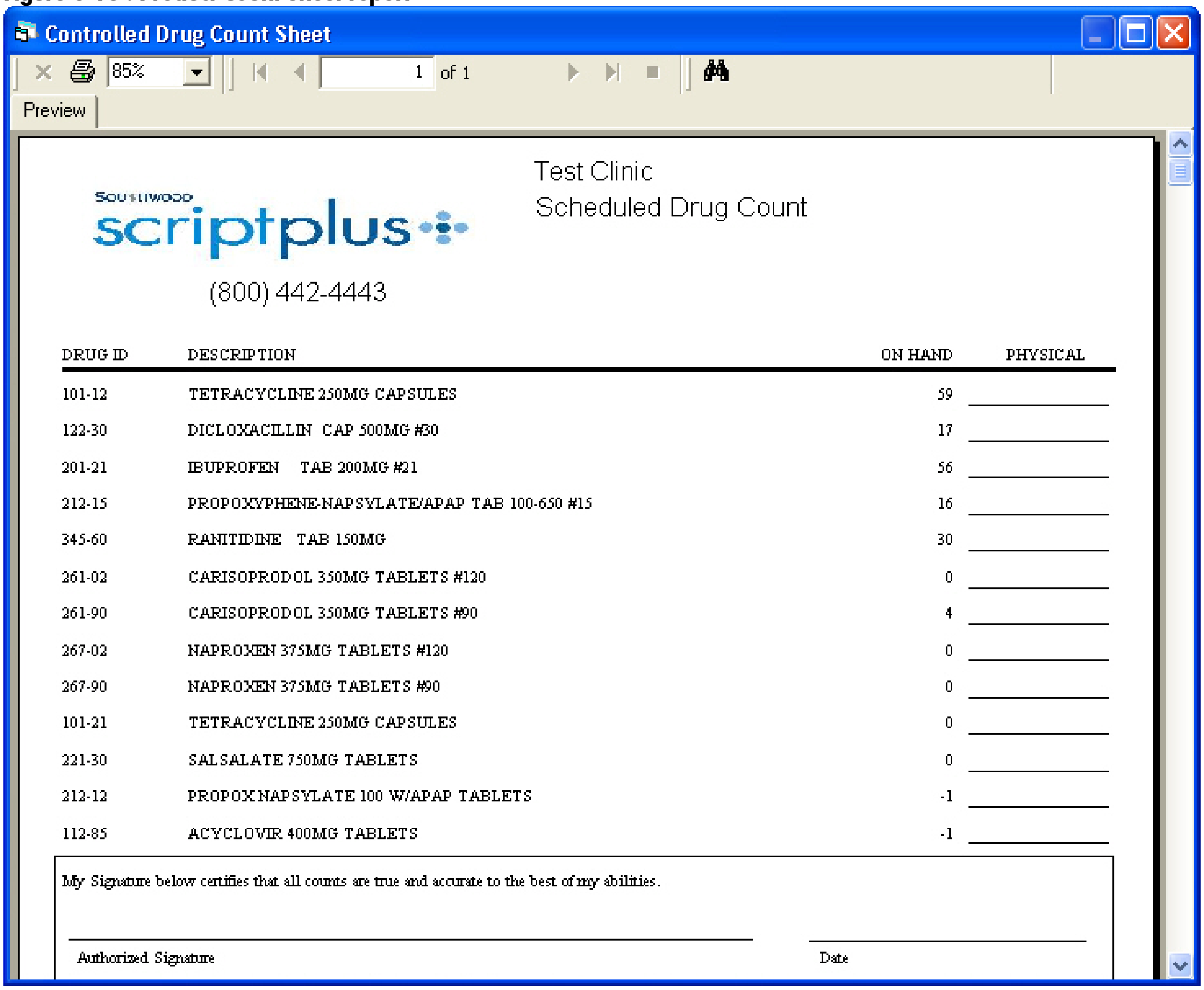
When you select a range category, the **From** and **To** fields will appear, with drop-down lists to select a specified range.

NOTE: If you select none of the range categories, the report will include all product dispensing records.

Select a **Sort Order** for the report—Drug Description or Brand Description—and click **View Report**.

The Product Count Sheet report will display in a new screen (see figure 6-13).

Figure 6-13 : Product Count Sheet report



Controlled Drug Count Sheet

Test Clinic
Scheduled Drug Count

(800) 442-4443

DRUG ID	DESCRIPTION	ON HAND	PHYSICAL
101-12	TETRACYCLINE 250MG CAPSULES	59	
122-30	DICLOXACILLIN CAP 500MG #30	17	
201-21	IBUPROFEN TAB 200MG #21	56	
212-15	PROPOXYPHENE-NAPSYLATE/APAP TAB 100-650 #15	16	
345-60	RANITIDINE TAB 150MG	30	
261-02	CARISOPRODOL 350MG TABLETS #120	0	
261-90	CARISOPRODOL 350MG TABLETS #90	4	
267-02	NAPROXEN 375MG TABLETS #120	0	
267-90	NAPROXEN 375MG TABLETS #90	0	
101-21	TETRACYCLINE 250MG CAPSULES	0	
221-30	SALSALATE 750MG TABLETS	0	
212-12	PROPOX NAPSYLATE 100 W/APAP TABLETS	-1	
112-85	ACYCLOVIR 400MG TABLETS	-1	

My Signature below certifies that all counts are true and accurate to the best of my abilities.

Authorized Signature

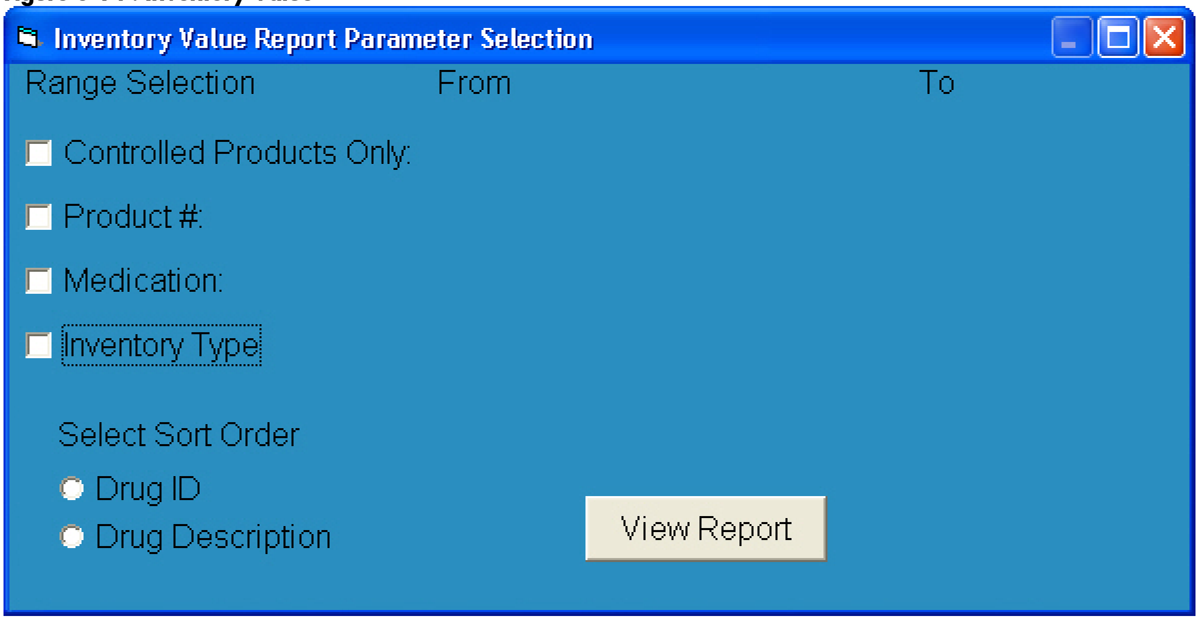
Date

Inventory Value Report

To generate an Inventory Value report, select a category from the **Range Selection** list (see figure 6-14):

- **Scheduled Products Only**
- **Product #**
- **Medication**
- **Inventory Type**

Figure 6-14 : Inventory Value



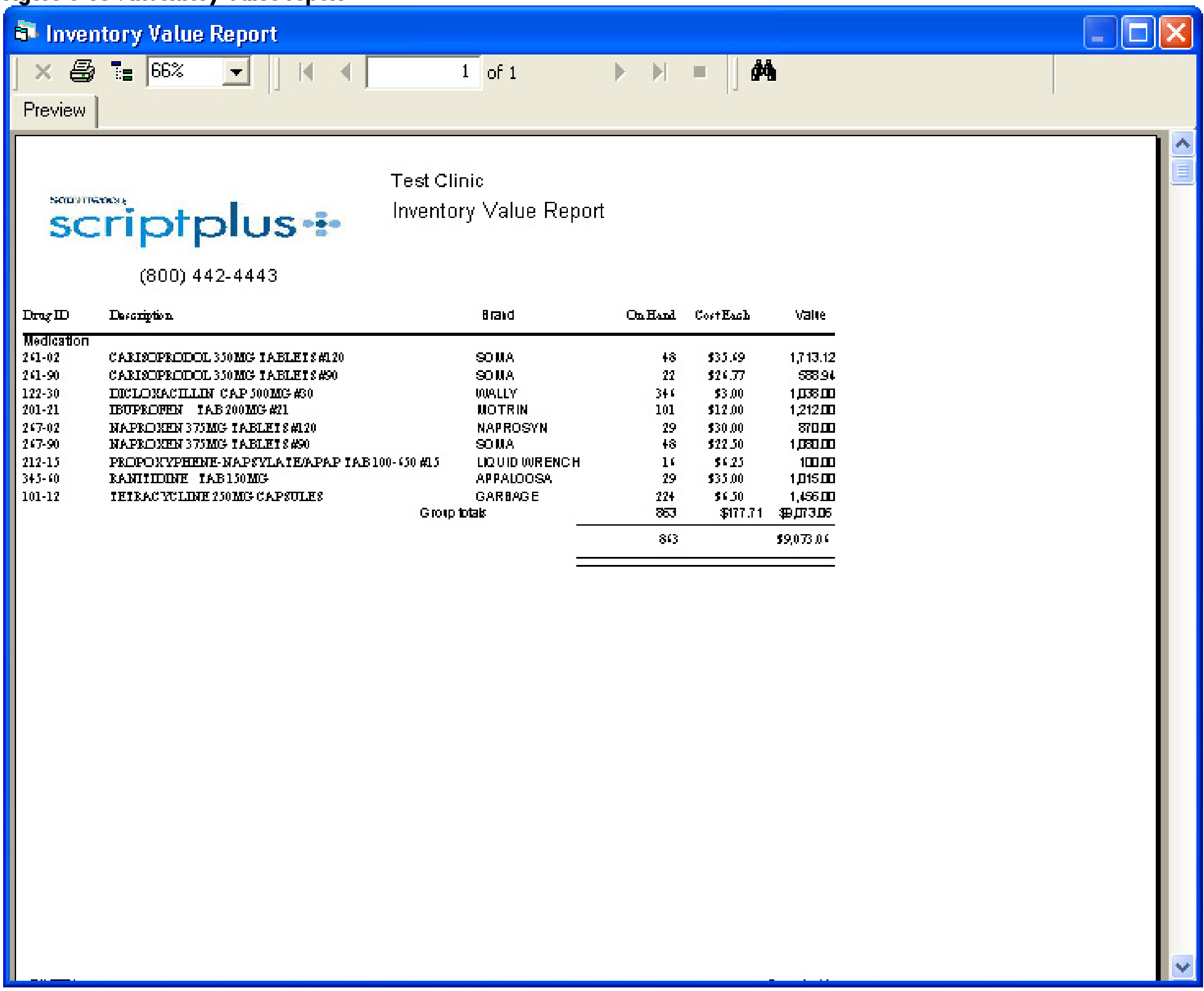
When you select a range category, the **From** and **To** fields will appear, with drop-down lists to select a specified range.

NOTE: If you select none of the range categories, the report will include all inventory value records.

Select a **Sort Order** for the report—Drug ID or Drug Description—and click **View Report**.

The Inventory Value report will display in a new screen (see figure 6-15).

Figure 6-15 : Inventory Value report



Test Clinic

Inventory Value Report

(800) 442-4443

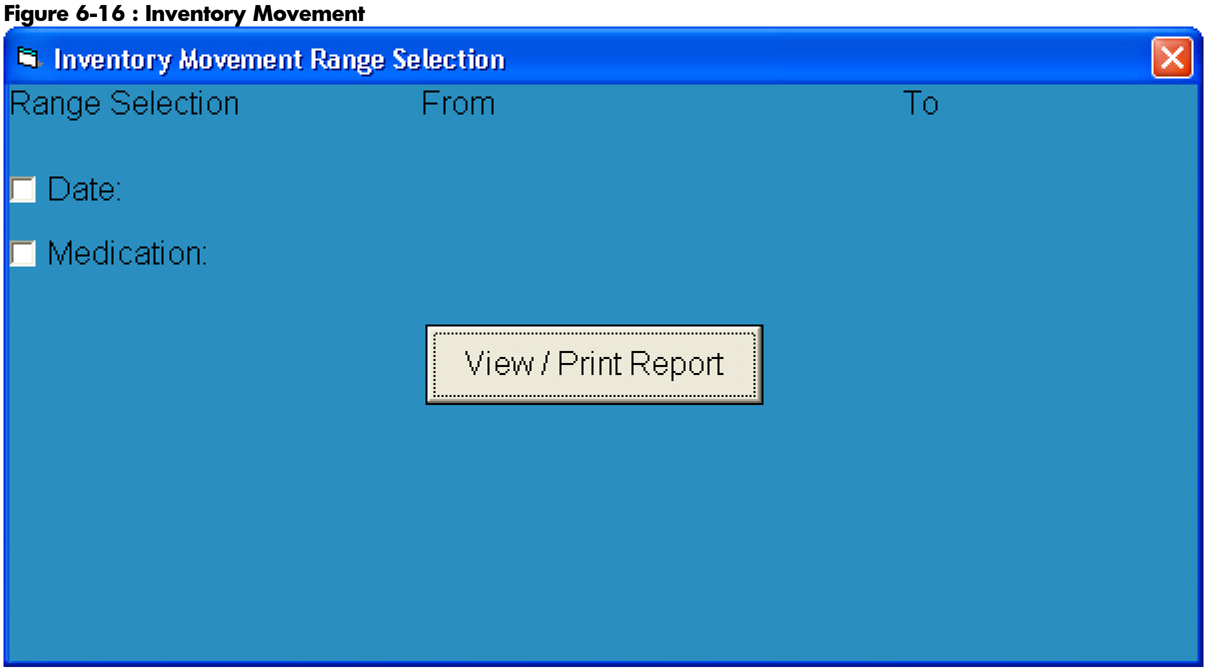
Drug ID	Description	Brand	On Hand	Cost Each	Value
Medication					
261-02	CARISOPRODOL 350MG TABLETS #120	SOMA	48	$35.69	1,713.12
261-90	CARISOPRODOL 350MG TABLETS #90	SOMA	22	$26.77	588.94
122-30	DICLOXACILLIN CAP 500MG #30	WALLY	346	$3.00	1,038.00
201-21	IBUPROFEN TAB 200MG #21	MOTRIN	101	$12.00	1,212.00
267-02	NAPROXEN 375MG TABLETS #120	NAPROSYN	29	$30.00	870.00
267-90	NAPROXEN 375MG TABLETS #90	SOMA	48	$22.50	1,080.00
212-15	PROPOXYPHENE-NAPSYLATE/APAP TAB 100-650 #15	LIQUID WRENCH	16	$6.25	100.00
345-60	RANITIDINE TAB 150MG	APPALOOSA	29	$35.00	1,015.00
101-12	TETRACYCLINE 250MG CAPSULES	GARBAGE	224	$6.50	1,456.00
		Group totals	863	$177.71	$9,073.06
			863		$9,073.06

Inventory Movement Report

To generate an Inventory Movement report, select a category from the **Range Selection** list (see figure 6-16):

- **Date**
- **Medication**

Figure 6-16 : Inventory Movement



When you select a range category, the **From** and **To** fields will appear, with drop-down lists to select a specified range.

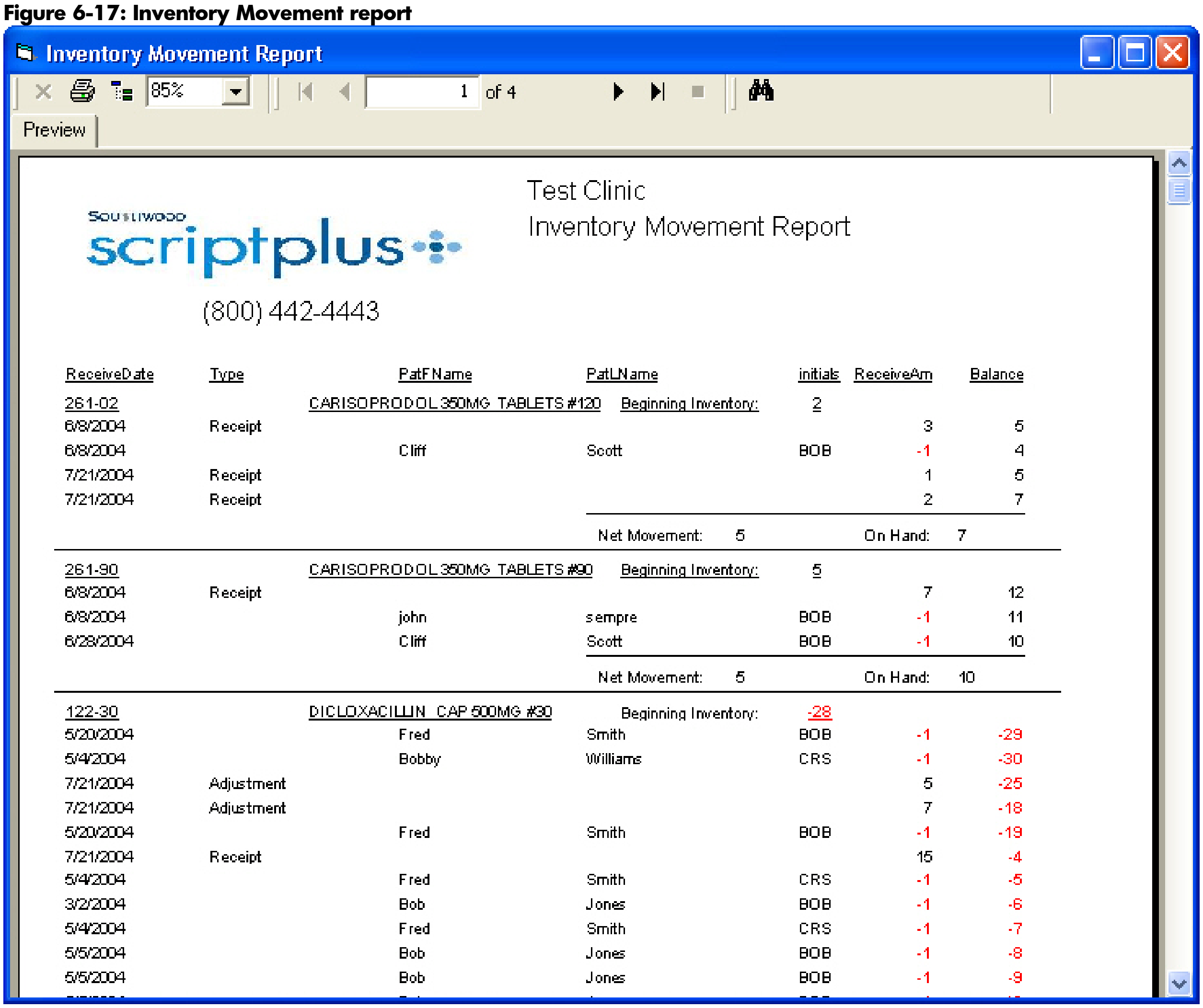
NOTE: If you select none of the range categories, the report will include all inventory movement records.

Click **View Report**.

The Inventory Movement report will display in a new screen (see figure 6-17).

Click the printer icon to print the report

Figure 6-17: Inventory Movement report



Test Clinic
Inventory Movement Report

(800) 442-4443

ReceiveDate	Type	PatFName	PatLName	initials	ReceiveAm	Balance
261-02		CARISOPRODOL 350MG TABLETS #120	Beginning Inventory:	2		
6/8/2004	Receipt				3	5
6/8/2004		Cliff	Scott	BOB	-1	4
7/21/2004	Receipt				1	5
7/21/2004	Receipt				2	7
			Net Movement: 5		On Hand:	7
261-90		CARISOPRODOL 350MG TABLETS #90	Beginning Inventory:	5		
6/8/2004	Receipt				7	12
6/8/2004		john	sempre	BOB	-1	11
6/28/2004		Cliff	Scott	BOB	-1	10
			Net Movement: 5		On Hand:	10
122-30		DICLOXACILLIN CAP 500MG #30	Beginning Inventory:	-28		
5/20/2004		Fred	Smith	BOB	-1	-29
5/4/2004		Bobby	Williams	CRS	-1	-30
7/21/2004	Adjustment				5	-25
7/21/2004	Adjustment				7	-18
5/20/2004		Fred	Smith	BOB	-1	-19
7/21/2004	Receipt				15	-4
5/4/2004		Fred	Smith	CRS	-1	-5
3/2/2004		Bob	Jones	BOB	-1	-6
5/4/2004		Fred	Smith	CRS	-1	-7
5/5/2004		Bob	Jones	BOB	-1	-8
5/5/2004		Bob	Jones	BOB	-1	-9